Create Bill Templates

Introduction

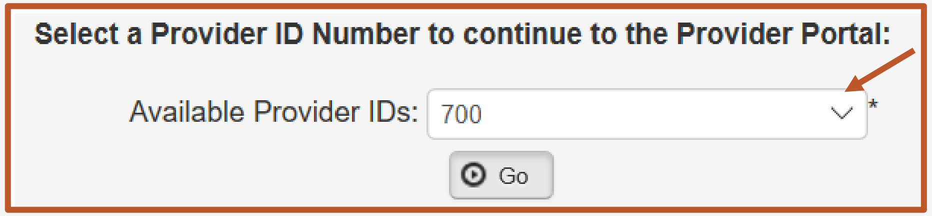
The Workers' Compensation Medical Bill Process (WCMBP) System features templates that allow providers to create preset formats for billing Office of Workers' Compensation Programs (OWCP), reducing the need to recreate an entire bill with each submission. The purpose of this tutorial is to educate providers on the use of bill templates for Direct Data Entry (DDE) online bill submission. It is broken out into these three sections:

- Creating and Managing Bill Templates
- Updating Bill Templates
- Deleting Bill Templates

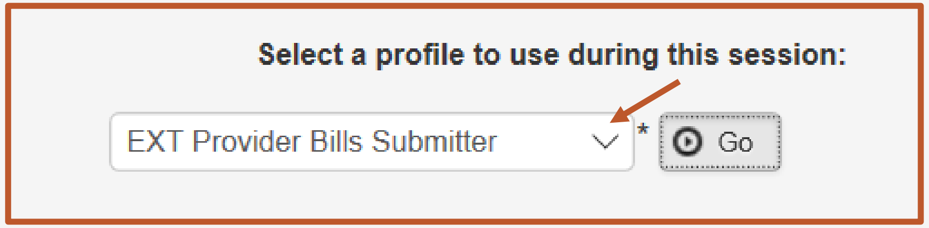
Creating and Managing Bill Templates

Creating and Managing Bill Templates (1 of 19)

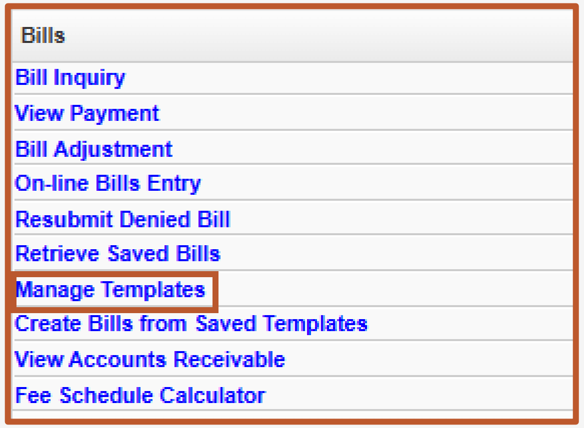
1. Log in to the WCMBP System. The system displays the **Select a Provider ID Number** page.



2. Select the **Ext Provider Bills Submitter** profile from the drop-down list and select **Go**.



3. From the **Bills** column, select the **Manage Templates** link.

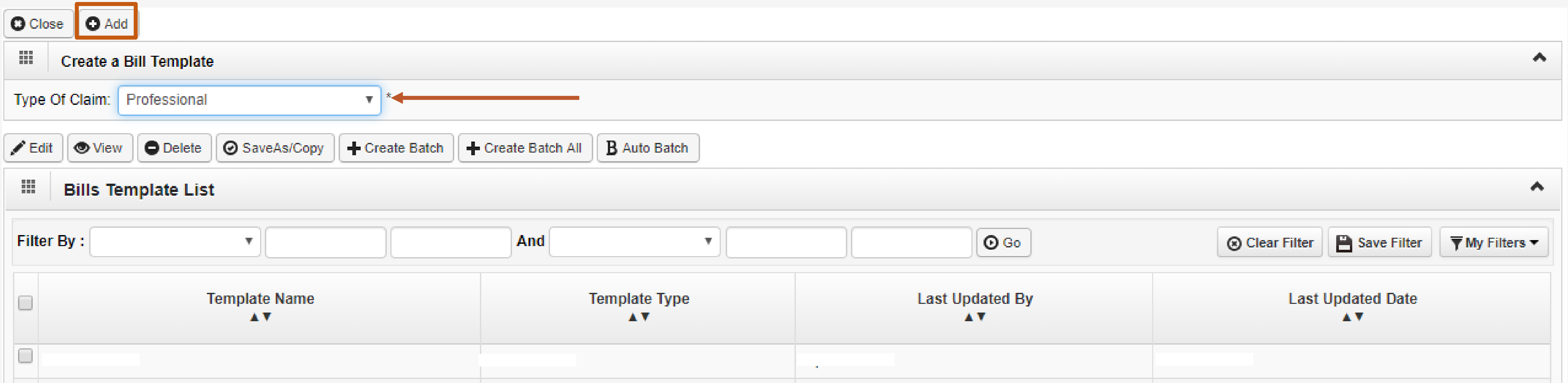


Note: Under **Admin**, **Maintain Users** and **Switch OWCP Provider ID** are two different links.

Creating and Managing Bill Templates (2 of 19)

Create a Bill Template:

4. Select **Professional**, **Institutional**, or **Dental** from the **Type Of Claim** drop-down list dependent on the type of bill for which the provider wants to create a template and select **Add**.



Creating and Managing Bill Templates (3 of 19)

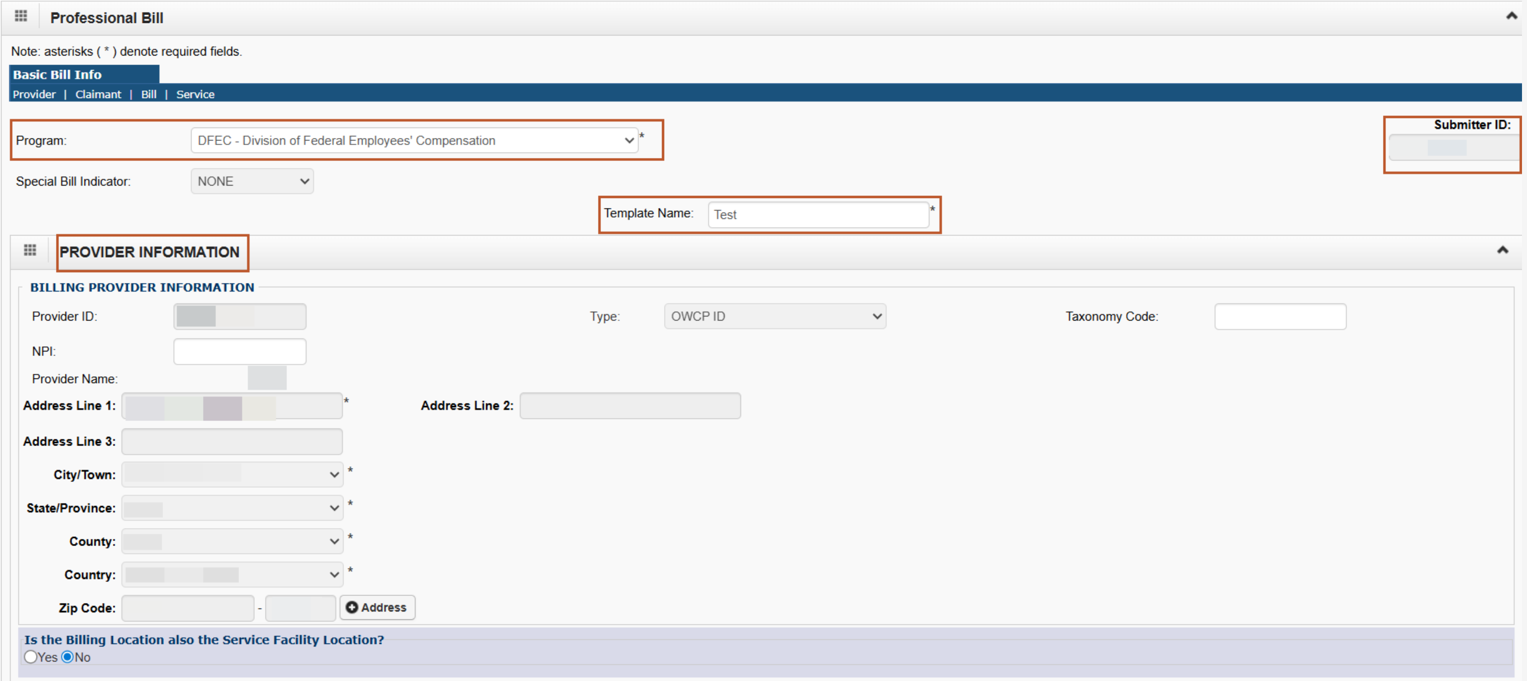
The **Professional Bill** page opens where the provider must enter Basic Bill information to create the provider template.

5. Select the program from the **Program** drop-down list at the top.
6. In the **Template Name** field, enter a name for the provider template.

Note: The **Submitter ID** is displayed at the top right side of the page, based on the provider login credentials.

Billing provider information populates based on the provider login credentials.

7. The Provider can enter rendering servicing facility information.



Creating and Managing Bill Templates (4 of 19)

8. Complete the following under the **CLAIMANT INFORMATION** section:

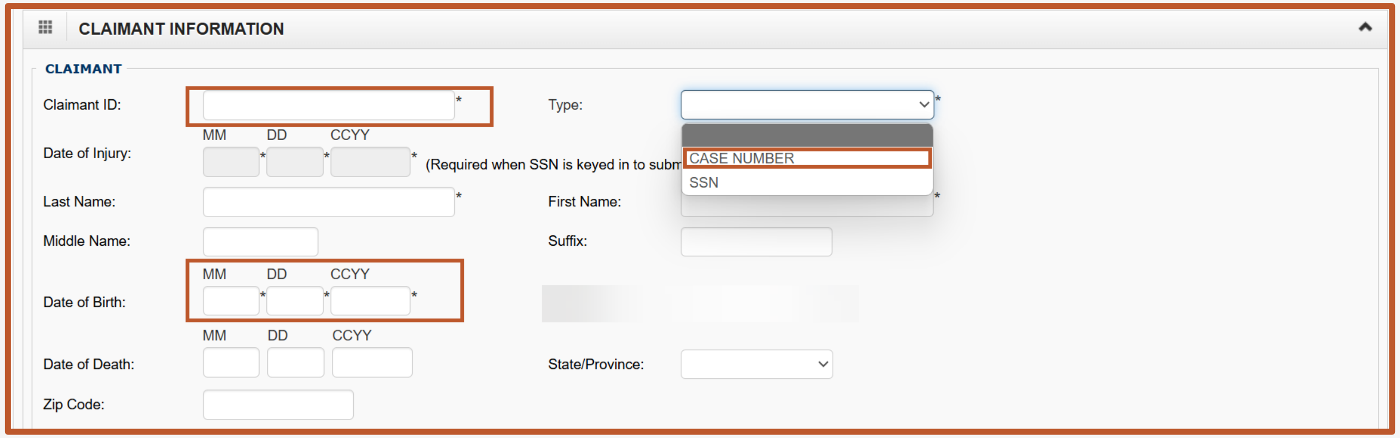
    a. Enter the claimant ID in the **Claimant ID** field.

    b. Select **CASE NUMBER** from the **Type** drop-down list.

    c. Enter the claimant's name in the **Last Name**, **First Name**, and **Middle Name** fields.

    d. Enter the claimant's date of birth (DOB) in the **Date of Birth** fields.

    e. Select the gender from the **Gender** drop-down list.



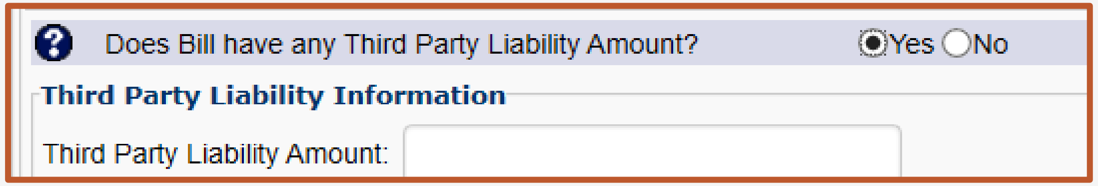
Creating and Managing Bill Templates (5 of 19)

Note: Once the provider selects the case number type, the claimant information may auto-populate.

Note: The template can be reused for the same claimant or a different claimant.

If the template will be used for a different claimant but for same type of services, the claimant information need not be added.

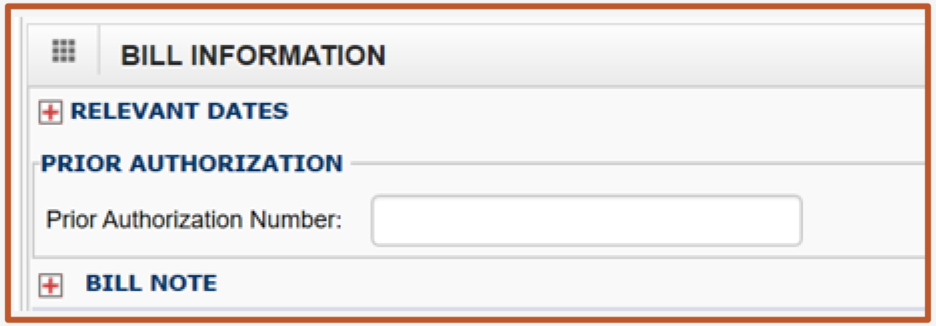
9. Select **Yes or No** to the question **Does Bill have any Third-Party Liability Amount?**.
   - If **Yes** is selected, enter the TPL amount in the **Third Party Liability Amount** field below.



Creating and Managing Bill Templates

10. Below the **CLAIMANT INFORMATION** section on this page, enter the **BILL INFORMATION**.

Note: Although these are not required fields, providers can select the plus icons to open the screens to enter Relevant Dates or a Bill Note. These fields are optional.



11. To enter relevant dates, select the plus icon next to **RELEVANT DATES**. A new dialogue box appears to enter the information.

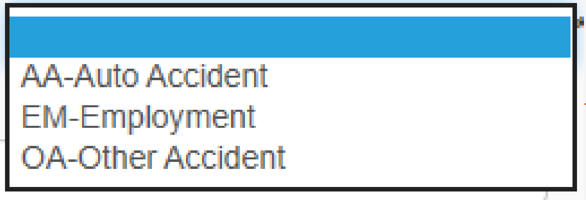
Creating and Managing Bill Templates (8 of 19)

12. To enter a bill note related to the services the provider is entering on this bill, select the plus icon next to **BILL NOTE**. A new dialogue box appears to enter the information.

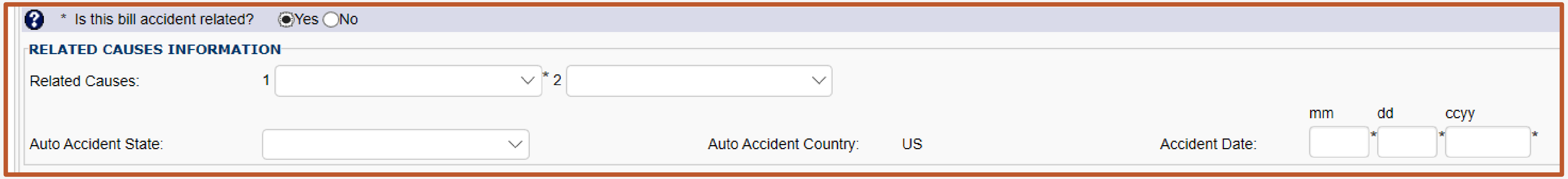
Note: Up to 80 characters can be entered.

13. Proceed as applicable depending on the answer selected for “Is this bill accident related?”

    - If “Yes” is selected, a screen opens for information to be entered. Select the applicable option from the **Related Causes** drop-down list.



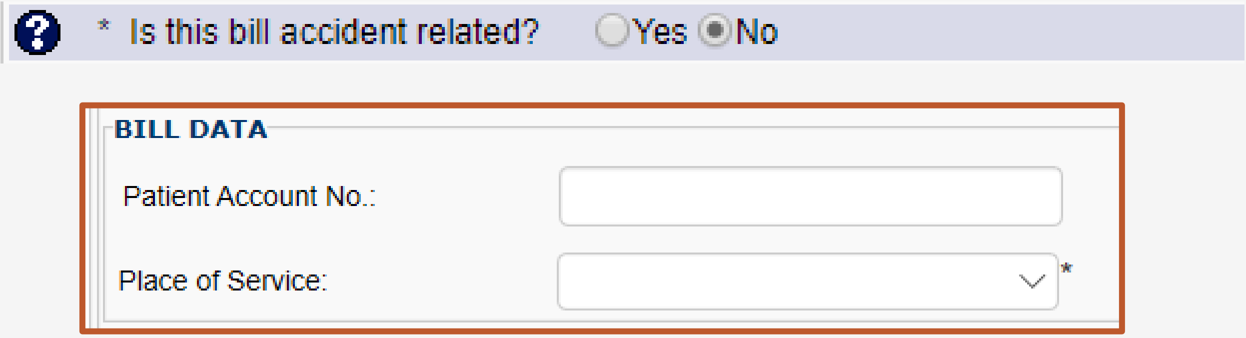
Related Causes Options.



    - If “No” is selected, complete these steps:

        a. Enter the patient account number in the **Patient Account No** field.

        b. Select the applicable option from the **Place of Service** drop-down list.



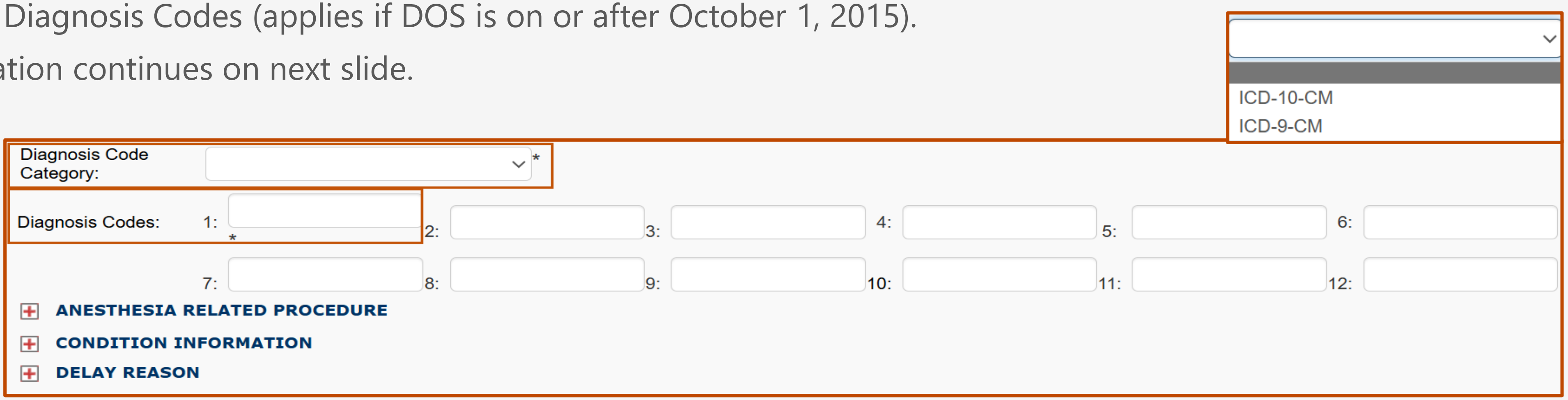
Creating and Managing Bill Templates (10 of 19)

In the Bill Data, Diagnosis Codes section enter the information as described herein:

14. From the **Diagnosis Code Category** drop-down list, select the code category the provider will be using, ICD-9 or ICD-10.
15. In the **Diagnosis Codes** fields, enter up to 12 diagnosis codes. List the ICD Codes in primary order.

Notes:

- All ICD-9 or ICD-10 codes must be listed based on the Date of Service (DOS).
- ICD Codes must be listed in sequential order, 1-12 (cannot skip a number).
- ICD-9 Diagnosis Codes (applies if DOS is on or prior to September 30, 2015).
- ICD-10 Diagnosis Codes (applies if DOS is on or after October 1, 2015).
- Information continues on next slide.



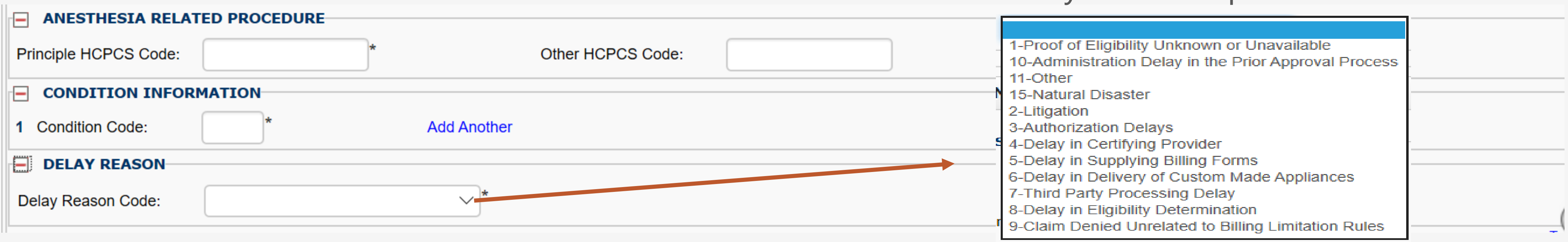
Diagnosis Code Category Options

Creating and Managing Bill Templates (11 of 19)

16. To add an **ANESTHESIA RELATED PROCEDURE**, **CONDITION INFORMATION**, and **DELAY REASON**, select the plus icon next each of these sections. These sections open to reveal required fields.
    - In the **ANESTHESIA RELATED PROCEDURE** section, update **Principle HCPCS Code** or **Other HCPCS Code**.
    - In the **CONDITION INFORMATION** section, update **Condition Code**. Add another **Code** if necessary.
    - In the **DELAY REASON** section, select a reason from the **Delay Reason Code** drop-down list.

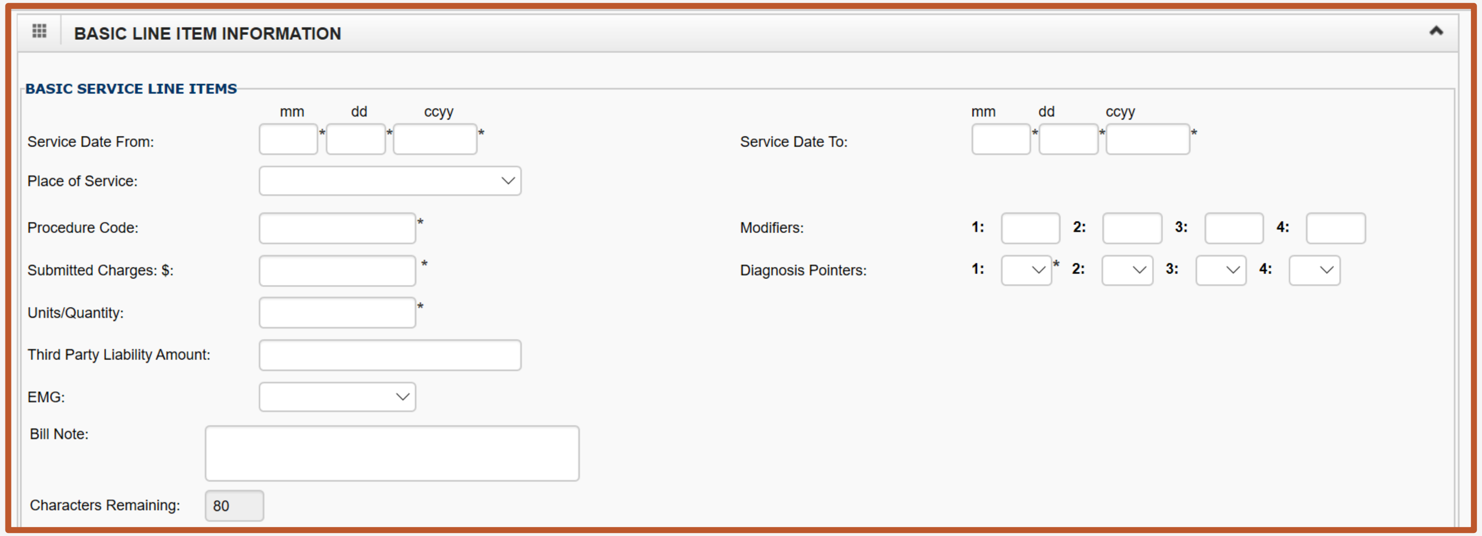
Note: Providers can select the minus icon next to each of these fields to minimize or exit the screen if it is no longer needed. Providers can select **Add Another** to add another Code.

Delay Reason Options



Creating and Managing Bill Templates (12 of 19)

17. In the **BASIC LINE ITEM INFORMATION** section, complete the following basic service line items:
    - **Service Date From** and **Service Date To:** Enter the date of service range (when the services were rendered)
    - **Place of Service:** (if different from header) Enter the two-digit POS Code representing where services were rendered
    - **Procedure Code:** Enter the five-character HCPCS, CPT, or CDT.
    - **Submitted Charges:** Enter the charge for the line item
    - **Units/Quantity:** Enter the number of units provided during the DOS range listed



Remaining fields are covered on the next slide.

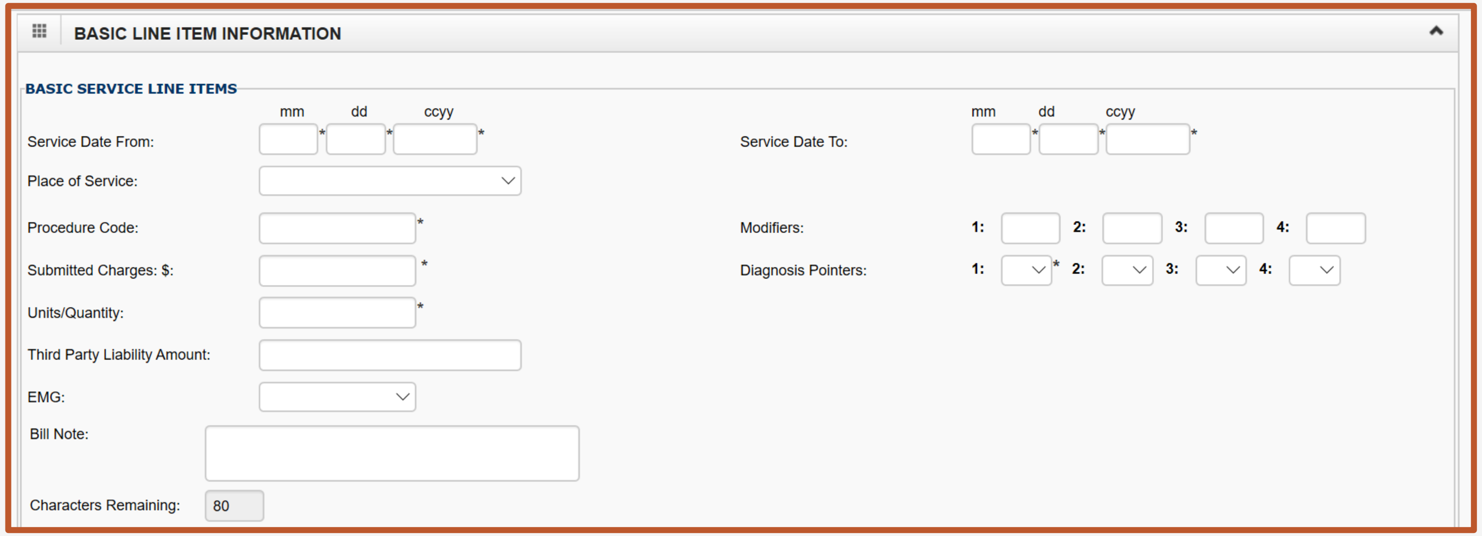
Creating and Managing Bill Templates (13 of 19)

18. In the **BASIC LINE ITEM INFORMATION** section, complete the following basic service line items:

   - **Third Party Liability Amount:** Enter the amount that was paid by a third party

   Note: If listed, monies will be deducted from the allowed reimbursement amount (Third Party Liability Amount).

   - **EMG:** (Optional) Select **Yes** or **No** as to whether this is an emergency service
   - **Bill Note:** (Optional) Enter a bill note, up to 500 characters
   - **Modifiers:** These are separate fields (up to four modifiers can be entered)
   - **Diagonal Pointers:** Enter the diagnostic reference number (one to twelve) from the **Bill Information** section) to relate the DOS and procedure performed to the appropriate DX

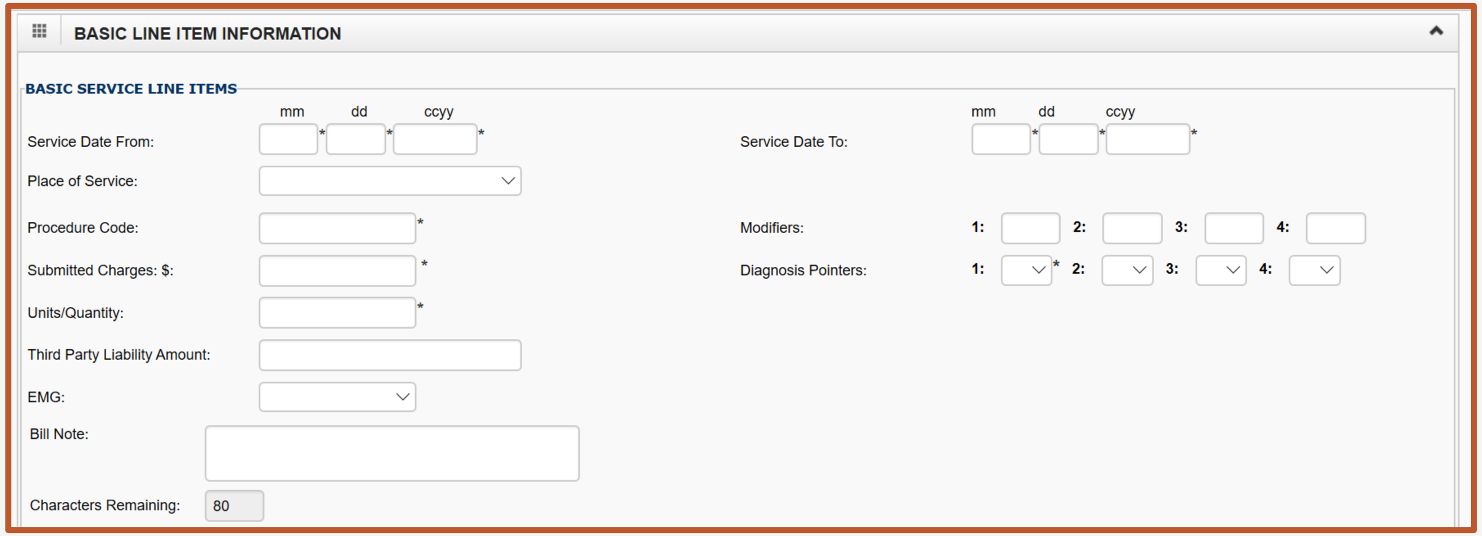


Creating and Managing Bill Templates (14 of 19)

18. In the **BASIC LINE ITEM INFORMATION** section, complete the following basic service line items:
    - **Third Party Liability Amount:** Enter the amount that was paid by a third party

    Note: If listed, monies will be deducted from the allowed reimbursement amount (Third Party Liability Amount).

    - **EMG:** (Optional) Select **Yes** or **No** as to whether this is an emergency service
    - **Bill Note:** (Optional) Enter a bill note, up to 500 characters
    - **Modifiers:** These are separate fields (up to four modifiers can be entered)
    - **Diagonal Pointers:** Enter the diagnostic reference number (one to twelve) from the **Bill Information** section) to relate the DOS and procedure performed to the appropriate DX



Creating and Managing Bill Templates (15 of 19)

19. In the **BASIC LINE ITEM INFORMATION** section, complete the following basic service line items:

    Prior Authorization Number : Enter the provider authorization number

    - **Rendering Provider ID (if different from header):** Enter if different from the header provider information
    - **Ordering Provider ID:** Enter if different from the header provider information
    - **Referring Provider ID (if different from header):** Enter if different from the header provider information

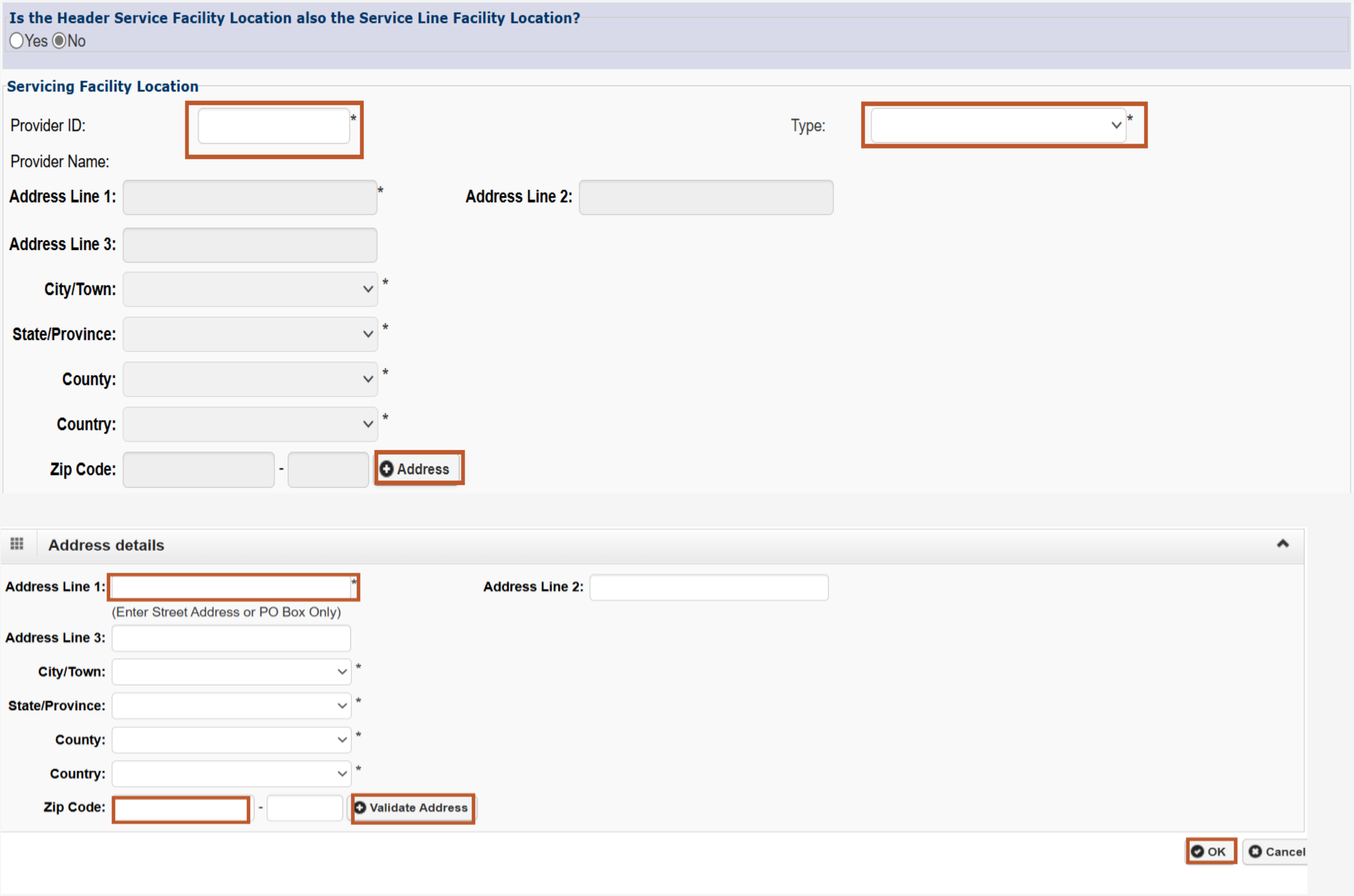
Note: The **Prior Authorization Number**, **Rendering Provider ID**, **Ordering Provider ID**, and **Referring Provider ID** fields are not required.

- Select the applicable response (Yes or No) next to **Is the Header Service Facility Location also the Service Line Facility Location?**

  Note: If "No" is selected, a dialogue box will allow the provider to add the Servicing Facility Location (address), Provider ID, and Type information.

20. In the **BASIC LINE ITEM INFORMATION** section, complete the following basic service line items:
    - **Is the Header Service Facility Location also the Service Line Facility Location?:** Proceed as applicable depending on the answer selected.

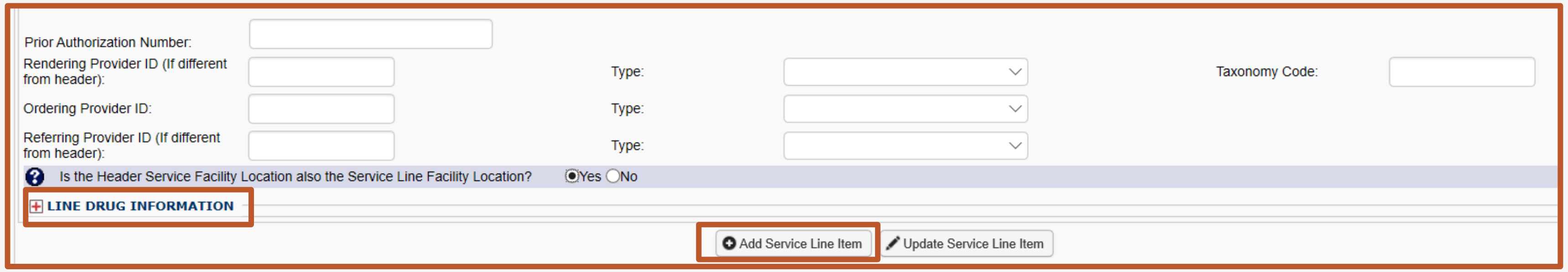
    Note: This section automatically defaults to **Yes**.
    - If **Yes**, proceed to the next step.
    - If selecting **No**, a dialogue box opens to add the Service Line Facility Location in the Billing Provider Information.
        a. In the **Provider ID** field, enter the Servicing Facility Provider ID.
        b. Select **NPI** from the **Type** drop-down list.
        c. Select the plus icon next to **Address** to enter the Servicing Facility Location address. The **Address details** window opens.
        d. Complete the **Address Line 1** and **Zip Code** fields, then select **Validate Address**. The remaining address fields automatically populate.
        e. To return to the **Professional Bills Online Submission** page, select **OK**.

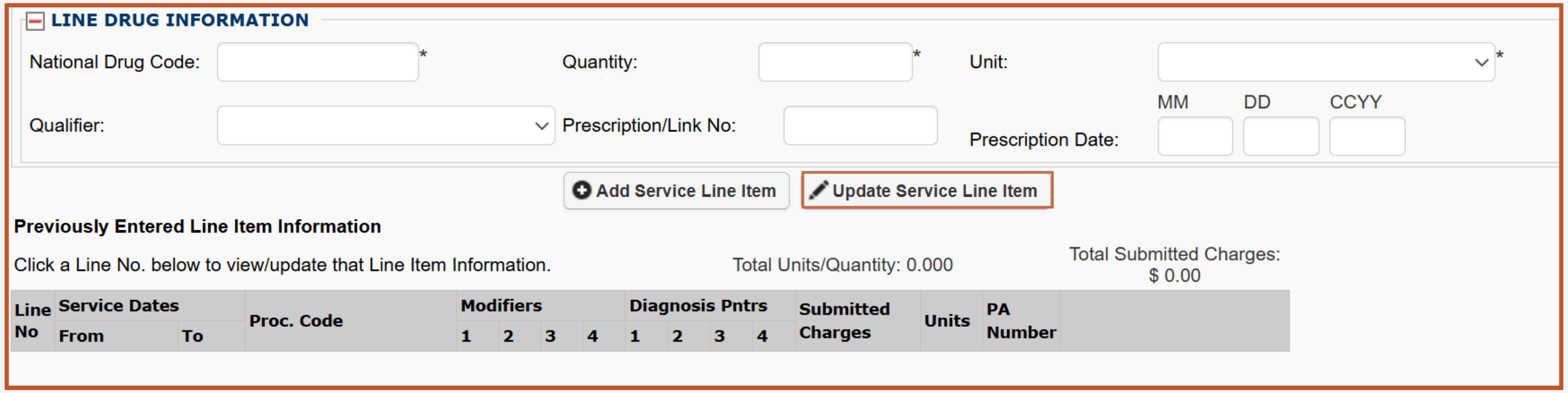


Creating and Managing Bill Templates (17 of 19)

21. In the **BASIC LINE ITEM INFORMATION** section, complete the following basic service line items:
    a. To add an additional line, select the plus icon next to **LINE DRUG INFORMATION**.
    b. To add additional line items to the bill, select **Add Service Line Item**. Repeat this step for additional lines.

Note: Providers can select **Update Service Line Item** to update an existing line item.





Creating and Managing Bill Templates (18 of 19)

22. Once a line item has been selected, the line item information added will be displayed.

Note: Providers can select the **Line No** link to make updates or they can select the **Delete** link to remove the line item.

23. Once providers have entered all line items, scroll back to the top of the page and select **Save Template** to save the provider bill template.

Note: Providers have an option to reset the bill if they want to start all over.

Previously Entered Line Item Information

Click a Line No. below to view/update that Line Item Information.

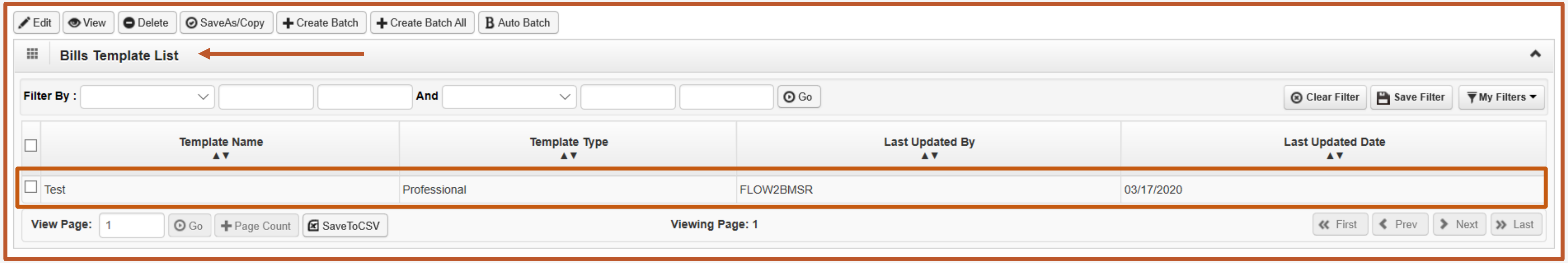
Total Submitted Charges: $ 100.00

Line No	Service Dates From	To	Proc. Code	Modifiers 1	2	3	4	Diagnosis Pntrs 1	2	3	4	Submitted Charges	Units	PA Number	
1			97140									$ 100.00	3		Delete

Note: A dialogue displays requesting confirmation that the provider wants to save the template.

Creating and Managing Bill Templates (19 of 19)

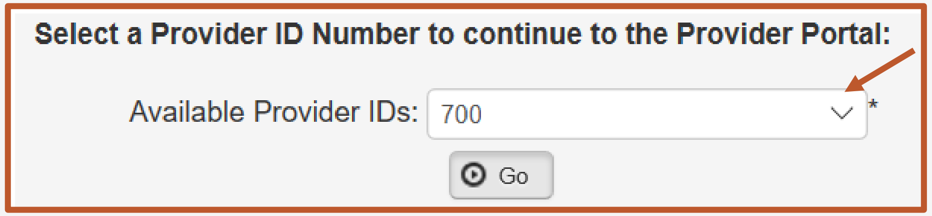
Note: Once the provider saves the provider template, it will be listed on the **Bills Template List** located at the top of the page.



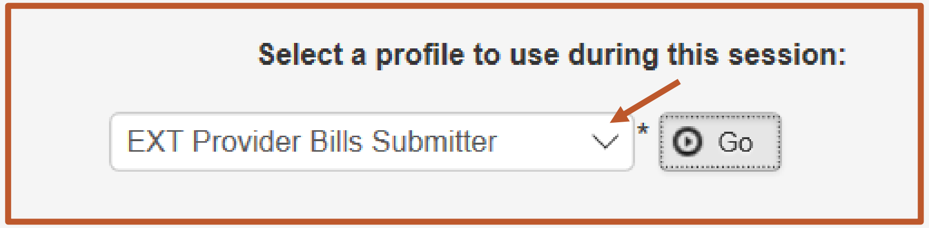
Updating Bill Templates

Updating Bill Templates (1 of 3)

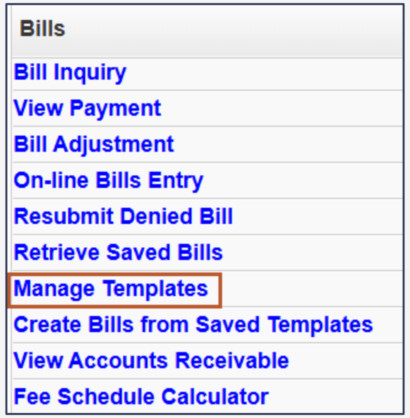
1. Log in to the WCMBP System. The system will display the default **Select a Provider ID Number** page.



2. Select the appropriate profile, **EXT Provider Bills Submitter**, from the drop-down list and select **Go**.



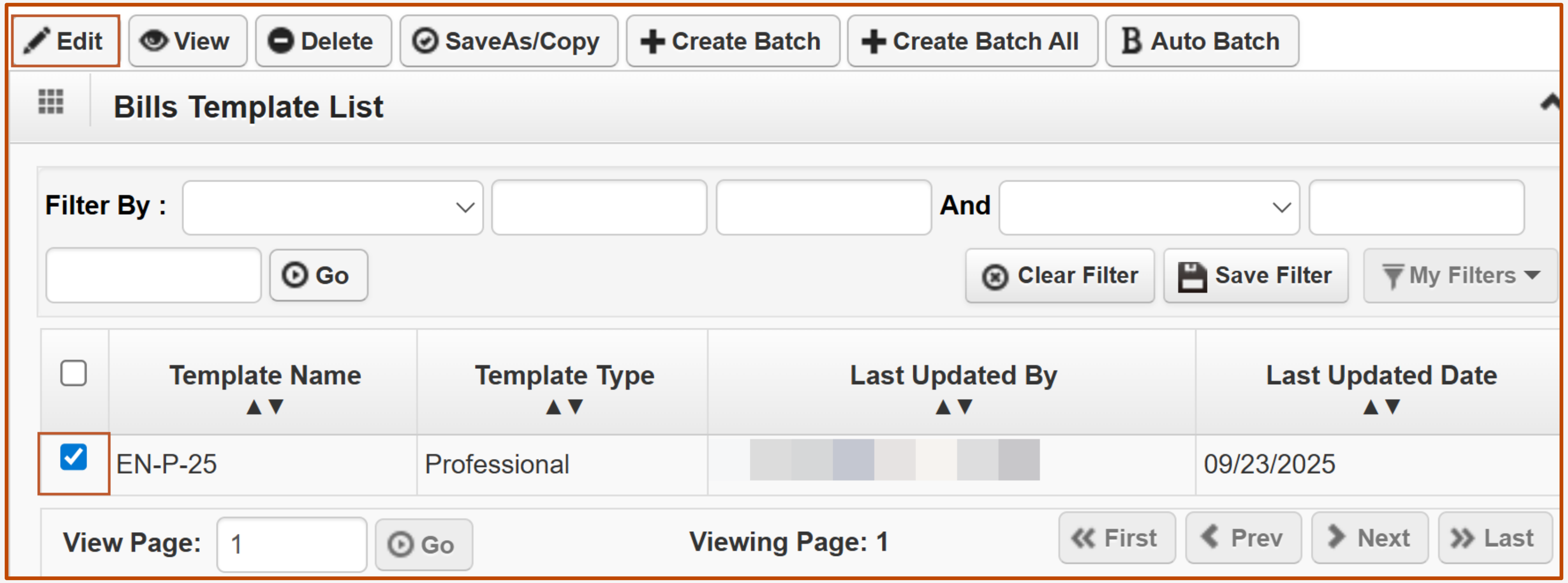
3. In the column under **Bills**, select **Manage Templates**.



Updating Bill Templates (2 of 3)

4. Select the checkbox to the left of the Template Name the provider wants to modify.

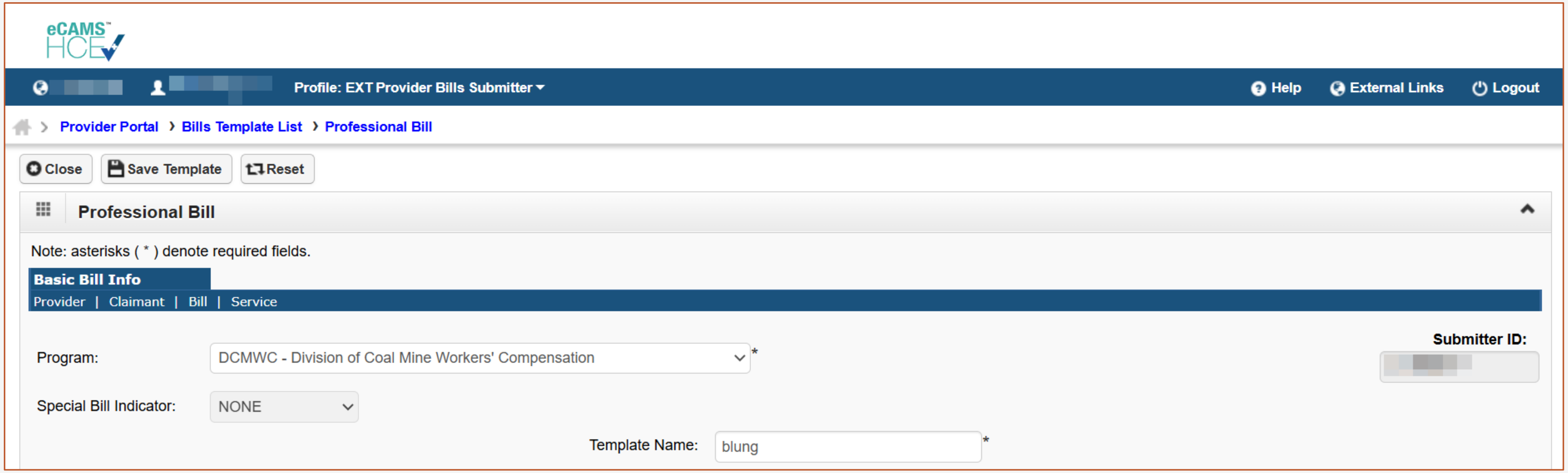
5. Select **Edit**.



Updating Bill Templates (3 of 3)

The Bill Template displays with the data prepopulated.

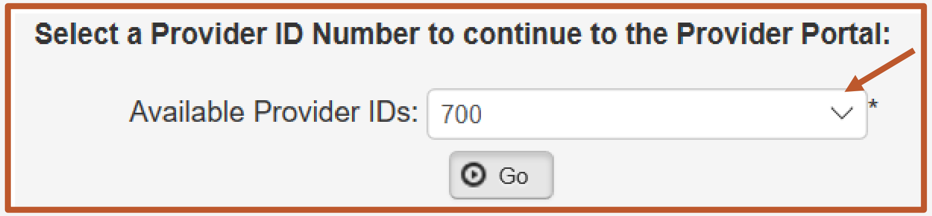
6. Make the necessary updates and select **Save Template**, or select **Close** to return to the previous page.



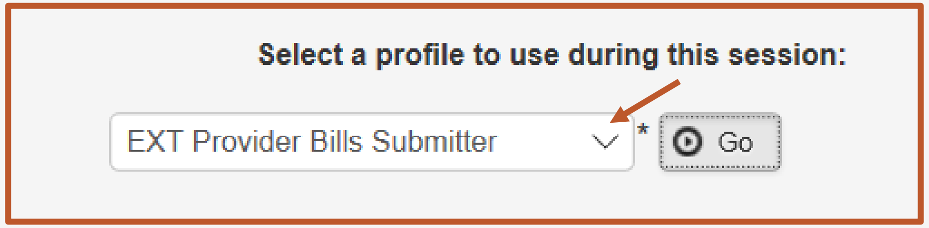
Deleting Bill Templates

Deleting Bill Templates (1 of 3)

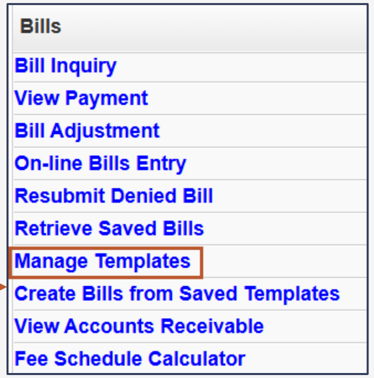
1. Log in to the WCMBP System. The system will display the default **Select a Provider ID Number** page.



2. Select the appropriate profile, **EXT Provider Bills Submitter**, from the drop-down list and select **Go**.



3. In the column under **Bills**, select **Manage Templates**.

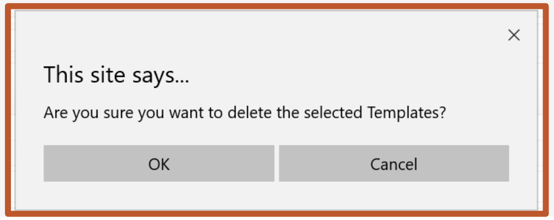


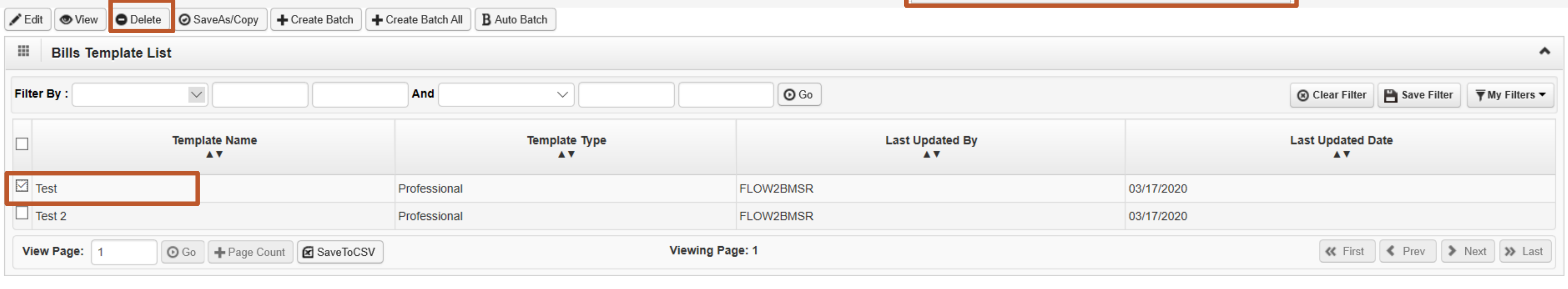
Deleting Bill Templates (2 of 3)

4. Select the checkbox to the left of the Template Name the provider wants to delete.

5. Select **Delete**. The system will display a dialogue requesting confirmation to delete the template.

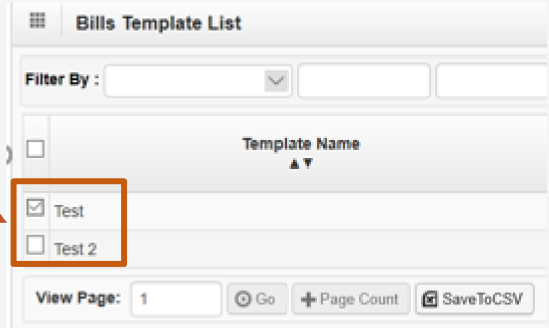
6. Select **OK** to delete or select **Cancel** to keep it on the **Bill Template List**. When OK is selected, the system deletes the template.



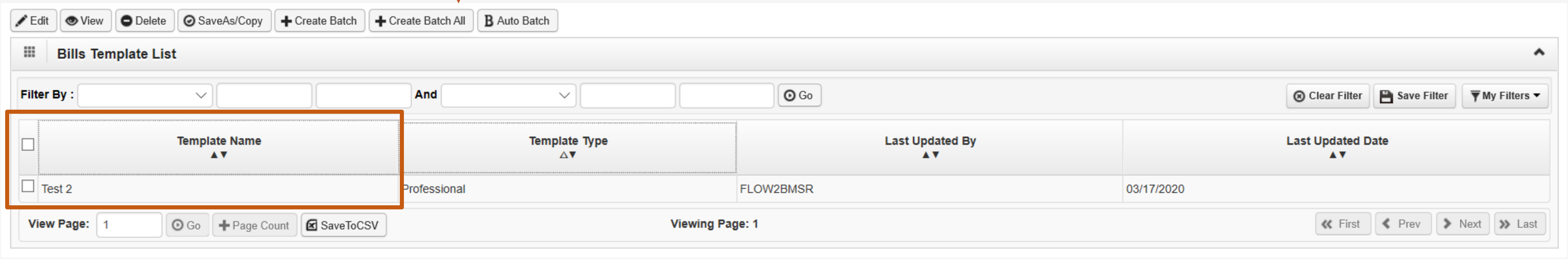


Deleting Bill Templates (3 of 3)

Note: Before deletion, the Bill Template List displayed two Template Names: Test and Test 2.



Note: After deletion, the deleted template – Test – no longer appears on the list page. Only Test 2 displays.



THANKS!