

Provider Training  
on  
Monthly Service Records (MSRs)

July 26th & 27th, 2010

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# Thank You

- On behalf of everyone at Developmental Pathways', we would like to thank you for taking the time to come and learn about the new process.
- Our goal is to insure accurate, timely and appropriate payments are made to SLS and CES providers.
- Please check off your provider name on the attendance sheet and make corrections if needed to your email address & other information, as that information will be used in our new processes.

# Why Are Changes Needed?

- New MSR is Needed:

- To Increase Accuracy

- The MSR is a program attendance, invoice & remittance form
    - It will be prefilled based on the Service Plan to increase accuracy and reduce denials by the State.
    - You will only have to complete the units of service delivered.
    - The State will be screening every invoice against the Service Plan starting 7/1/2010 for SLS and CES, so it was critical to have more accuracy.

- To Improve Communications

- The MSR will also serve as a remittance advice and we will note any changes we make to your invoice and return it with your monthly check

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# Why Are Changes Needed?

- New Processing Fee is Needed:
  - 4% if electronically via MSR, 5% otherwise
  - To Cover Costs of Processing Invoices:
    - Complexity - The processing of invoices for the SLS and CES programs has become increasingly difficult and labor intensive requiring more and more staff resources of Pathways.
    - Too Costly - Pathways can no longer absorb the costs.
    - Other CCBs Apply Fees - A majority of other CCB's in Colorado have already instituted processing fees.
    - While Pathways has delayed this for as long as we can, we must now move forward with this.
- **Option** — you can become a Medicaid approved provider (SLS-M & CES) and bill ACS for Medicaid directly rather than through Pathways. If you want to do this, contact the State DDD office.

# What Will Change?

- One MSR will be sent to your e-mail address  
(Tested okay on Excel versions – 2007, 2003, 2000 (possibly 1997))
  - Do NOT change the Name or Format of the MSR File
    - Save the MSR to your computer with the same name as when emailed to you
    - Keep it in the same Format (i.e. Must be a Excel \*.xls file)
  - MSR will have up to 3 different tabs:
    - Medicaid SLS, CES and State Funded SLS.
    - Example - If you are only have clients in the CES program, then the MSR will automatically open up to that tab.
  - Write-in Tabs - Plus up to 3 more tabs if you have more ‘write-ins’ of clients-services not on the prefilled form.
- No Email?
  - Pick up at Pathways - Then you will need to come to our Inverness office during the mid month to last week of each new billing month to pick up your pre-populated MSR. Ask the Receptionist, who will have your ‘PDF’ version of the MSR for you to manually complete.
  - Higher Processing Fee - You will then be subject to the 5% processing fee.
  - Return by postal mail or hand deliver by same deadline (i.e. we must receive it by 6 pm on the 3<sup>rd</sup> business day of the month )

# What Will Change?

- The MSR will be pre-populated
  - Clients, Services, Annual Units, Service Date Span, Maximum Units/Month, Rate
  - Billing Period - The MSR will already identify the billing month, year
  - Provider Information – your name, address, phone, email, primary contact person
  - Invoice Number - An automatic invoice # will be assigned (but you can optionally enter your own internal invoice as well – DP will not use that #)
- Provider Entry
  - Prefilled Areas are Locked - The MSR will only allow you to type in certain fields ... others will be locked down
  - Units by Dates of Service – you enter your units under 1-31 for the days of the month
  - Yellow Write-in Area - The MSR will allow you to add clients & service (with prior authorization) at the bottom of the form
    - Only add clients/services if they are on a Service Plan or Cover Sheet – Do NOT rely on verbal promises or other written material
    - You do NOT need to attach Service Plan or Cover Sheet (we have them)
  - Provider Justification & Comments – The MSR will allow/require you to make comments when clients or services are added or you delivered more services than the Maximum Units for the Month
  - Certification - The MSR will only require your typed signature as certification of the invoice.

# What Will Change?

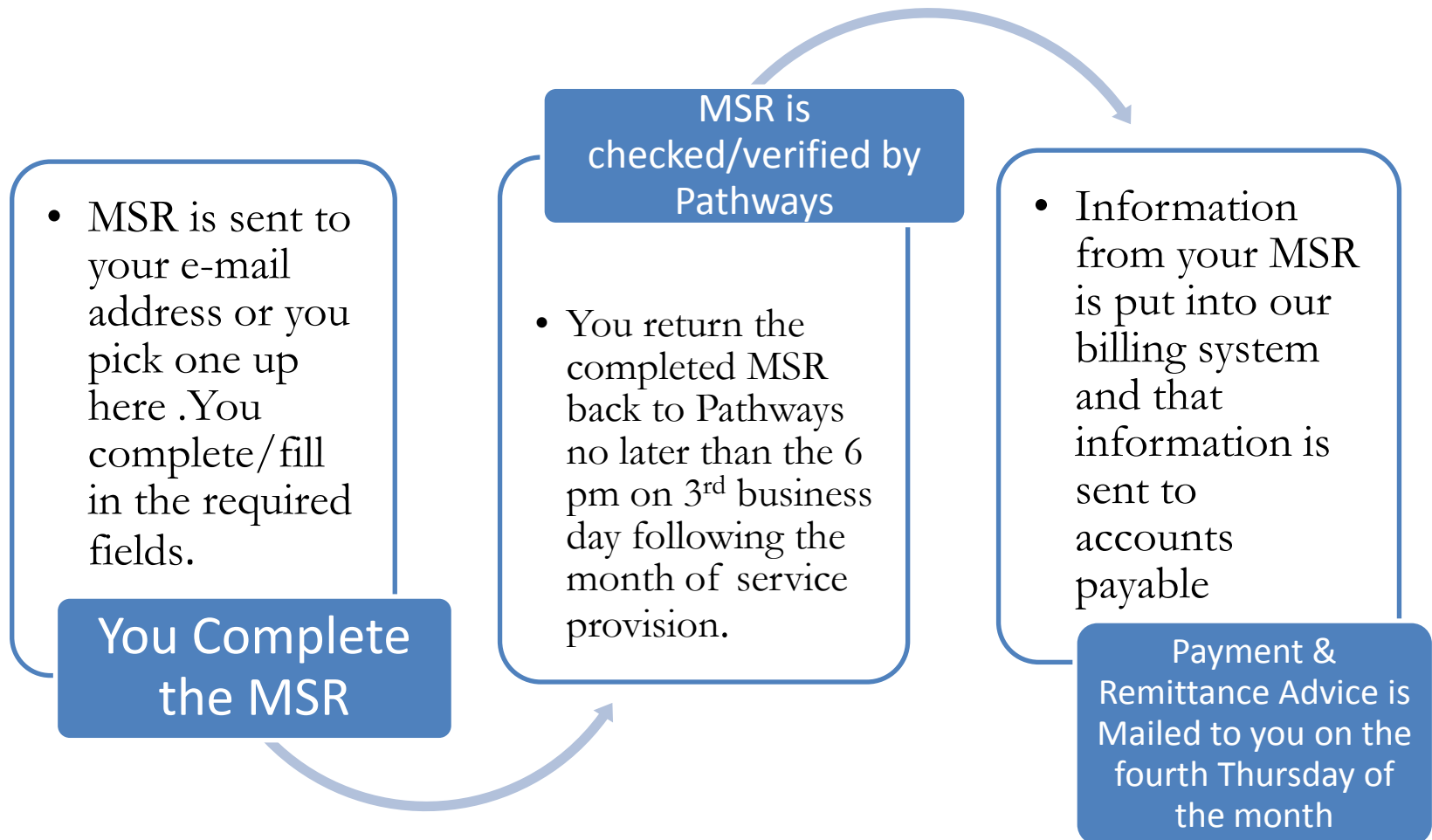
- Submission Deadlines –
  - Submit via Email by 6 pm on the 3rd business day of the month
  - Late Submissions - will be processed the following month
  - Processing Fee - You will be charged a 4% processing fee if MSR is sent as an excel sheet via email, otherwise 5%
  - One MSR invoice per Month - Only one MSR may be submitted each month for each program – all services and clients are on the same form for the month

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# What Will Change?

- Paychecks will be mailed on the last working Thursday of the month
  - Remittance Advice - When you are paid, you will receive a copy of the MSR attached to your check
  - DP Review - It will show any changes under the DP Review section or Pathways Additional Comment section near bottom.
  - Didn't Get Your Check? - If you don't receive your check within 6 days after the fourth Thursday., then call us.
- **Back Bills** (for prior months)
  - Not ready yet - A “Back Billing” form will soon created and will be posted on our website under *Vendor Resources*.
  - Use Old Forms for Now - Until you receive notification of that, use our current forms which can be found on our website.

# How this Works?



# What to Expect Now?

- First month may have more issues – so be patient
  - Learning the new form
  - Clients or Services not pre-filled that you will have to enter in the Yellow section for review
  - Next month, we will move any clients-services from the yellow section to the turquoise section if confirmed during review
  - Let us know what is or is not working right, so we can fix it
- MSRs will be sent to you by late August for the August Billing Period
  - By mid-month for Sept. and Subsequent billing periods.
  - Use existing forms for the service month of July.
- Return completed by 6pm on 3<sup>rd</sup> business day of the following month
  - [SLS-CESinvoicing@developmentalpathways.org](mailto:SLS-CESinvoicing@developmentalpathways.org)
- Billing hotline
  - (303) 858-2203
  - Only call if you have not received the new MSR for the next billing month.

# Notes from Demo of the MSR

- **Entry of Units:**
  - Turquoise Area – is for entering units for pre-filled clients- services
  - Yellow Area – if for ‘write-ins’ of new clients or services (if authorized)
- **Freeze Panes** – as you move your cursor around the sheet, you will find that a certain sections (name, service columns and top heading rows) always stay on the screen even when you move across the screen within the “Dates of Service” areas. That is so you always know which day of the month you are recording units under and for which client/service
- **Automatic Edits or Error Messages**
  - Red Text - Potential issues are flagged in red (in units, costs, etc.)
  - Error Messages - Potential errors are automatically identified under the DP Review column
  - Units must be whole numbers (no decimals) under the Dates of Service
  - Drop Down Service List - Services can only be selected from a drop down menu, if adding new clients or services
- **Automatic Calculations for Accuracy**
  - Total Units - Units under days of the month are automatically totaled
  - Revised Units – if you exceed the Max. Units for the Month, the ‘Revised Units’ will cap at that maximum
    - (this will be reviewed and might be approved if you justify in the Provider Justification column)
  - Cost – This is automatically calculated as Revised Units time Rate
  - Total Units and Total Cost - across all lines on the Invoice
  - Calculation of the Processing Fee
  - Net Payable ( Total cost minus processing fee) – what your check will be after review

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# Notes from Demo of the MSR

- Maximum Units Per Month –
  - These authorize the units available in a given month
  - Total Units - The units you deliver will be summed into a Total Units column
  - Revised Total – the units you delivered exceed the authorized ‘Max. Units in a Month’, then you will see a ‘red’ entry under ‘Revised Total Mo. Units’ which will be capped at the ‘Max. Units in a Month’.
  - You must justify any units above that maximum in the Provider Justification Section
  - DP will review and either Confirm (& you will be paid for those) or Not confirm (you will not be paid for the extra)
  - You will only get paid for units above the maximum if they are approved by Pathways.
  - If they are disallowed & you believe they should not have been, then you can re-submit the extra units on a Back Bill form and have it reviewed again.
- Provider Justification Section – use the this to:
  - Justify units delivered above the Maximum Units for the Month
  - Justify any new clients or services entered into the yellow section
- Provider Comment Section (at bottom)
  - Note any changes to provider information (email, contact person, phone, address, name)
- Small Font Size
  - This was unavoidable to get all the information we needed on the form
  - You can change the ‘View’ on your computer in Excel, so it appears larger, if you want.

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# Notes from Demo of the MSR

- Extra Write-in Tab
  - If there are more new clients and services than fit on the MSR tab, then use the Extra Write-in Tab
  - It only has yellow lines.
  - This might happen the 1<sup>st</sup> month (i.e. August), but should not happen after that point
- Printer Issues
  - The MSR prints on 2 pages (letter size) unless you have client/service rows greater than 20.
    - First page is a form you can use to keep track of your service delivery (units delivered) each day, if you wish to do that.
    - Second page calculates the totals and is used by DP to indicate any revisions they make. DP will return this page to you along with your check after they process your invoice, as a 'remittance' advise.
  - Some printers space differently.
  - If your MSR form does not print on 2 pages, then see Instruction tab on the MSR...
  - If you have more than 22 clients in the turquoise area, then it is unavoidable
  - If you have fewer than 22 clients in the turquoise area, then you can correct the paging
    - If Excel 2007, then click the 'Page Layout' tab, then the Page Setup right arrow at bottom of that tab, and then clicking the 'Page' folder. Then reduce the 'Adjust to' percentage until it prints correctly.
    - If earlier Versions of Excel – you would find this command under 'File', 'Page Setup', 'Page'. Then reduce the 'Adjust to' percentage until it prints correctly.
    - DO NOT check the 'Fit to' choice. Please call Pathways if you need assistance.
    - If you tell us what % Adjustment you make, we can change your MSR, so you will not have to do it every month.
- Instruction Tab – all of these instructions are on your MSR for reference

# Thank you again for your time

- Remember to check off your name on the attendance sheet
- Write in, if missing
- Check that the information we have about you is right
  - Email address (or you might not get your MSR which would be your mistake)
  - Address, phone, key contact person