



# BILLING MANAGER

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Imagine never having to plug data into a spreadsheet to complete an invoice again– never having to pull out the calculator to add up the total number of units and dollars to bill. We're in the age of billionaires making their own personal spaceships. The possibilities are limitless!

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# MAKE BILLING A BREEZE

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While we won't be needing to build space tech anytime soon, Vertex Systems has discovered a way to integrate software into all aspects of your IDD agency's operations so you can optimize your team's workflow and fully maximize all your resources.

Billing Manager makes billing a breeze by creating invoices using the service documentation entered by service providers while on or off-site. It's all accomplished using the innovative software that was created specifically for IDD agencies, like yours. We've partnered with other organizations who've had unique requirements, and through consistent collaboration, we were able to implement new features to further suit their needs.

Just within this solution, Billing Manager can create new unit sizes if our system doesn't already list it as an option.

Our goal is to provide you with the tools you need to take back the valuable time currently spent on tedious tasks. With Vertex's billing and invoice solution, you can dedicate more energy and resources to developing your team. Let Billing Manager take care of the administrative tasks!

Leverage features of Vertex Case Manager to simplify the billing process. Already using a reliable system to manage your cases? Add Billing Manager as a feature to elevate it.

## VIEW THE LATEST FINANCIAL INFORMATION & AUTHORIZATION AMOUNTS

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No more formulas or waiting for someone to return from lunch so you can ask about that missing piece of data. Billing Manager's software automatically collects service time entries when needed for billing.

HERE'S HOW 

## IMPORT THE LATEST & MOST ACCURATE AUTHORIZATION

With a minimum of one authorization and no limit for the maximum number of authorizations per consumer, you can bill the appropriate billing codes to the correct funding source with just a few clicks. Import the updated authorizations so you have the most accurate data.

### IMPORT, TRACK & MANAGE CRITICAL DATA SUCH AS:

- Billing code
- Description
- Start and stop date
- Expiration date
- Authorization number
- Rate directly from the billing code  
(can be overwritten if necessary)
- Unique traits for general ledger account  
number, department number or other feature



## AUTHORIZATION UTILIZATION

Set a limit in the authorization on what the consumer is billed for during a period such as a week, month or year with the Maximum Billing Units feature. Once the max has been reached, Billing Manager no longer bills and lists any services delivered in an adjustments column. Access various reports to compare and verify the information, then click a button to create the electronic 837 file for your invoice.

### CREATE BATCHES TO QUICKLY GATHER INFORMATION:

- Select the name of the funder
- Enter a start and stop date
- Select individual or all services
- Click 'Save'

That's all there is to it! Once you've reviewed the information, click 'Create Invoices' and the electronic file is sent to the funder.

## **AUTOMATICALLY FILTER THROUGH SPECIFIC DATA**

Billing Manager uses what's called an AR analysis to examine information based on anything from accounting periods to a specific ICN. Choose from various filters, select a billing summary, show payments, denials and the like, then decide what type of information to add to the report and how to group. Additionally, you can select one or several funding sources and show data for one or multiple consumers.

## **TAKE ADVANTAGE OF A SECONDARY LEDGER**

Complete transaction details are consolidated in Billing Manager's AR Analysis, providing one place to research and respond to billing issues. Additionally, the AR Analysis voids and resends invoices and checks for payments made against invoices received electronically through an electronic 835. Access all information through the AR Analysis for your research to leverage as needed.

### **END-TO-END RECONCILIATION**

Each time you bill, every line item is stored as a single transaction that's then rolled up to the invoice level. Incoming payments and denials are matched to the corresponding charges, and outstanding balances are automatically calculated.

### **DENIAL MANAGEMENT**

Denials are automatically identified in the AR Analysis when reported by the funder. You can filter by the denial type to view only those charges rejected by the funder as well as the reason for the denial.

### **VOID AND RESEND OF INVOICES AND INVOICE LINE**

Based on your choice of action, use a drop-down list to void the invoice or line, resend as original or replacement, or write-off the amount to clear the ledger of this charge.

## **MULTIPLE FUNDERS SUPPORTED**

Most agencies bill Medicaid but you can also bill your local counties or other state agencies, such as VR or Work Programs, and self-pays. Your state is automatically supported with electronic billing when the state allows.

## IMPORT THE LATEST & MOST ACCURATE AUTHORIZATION

### ELECTRONIC INVOICING VIA 837P AND 837I

Billing Manager automatically submits electronic 837P and 837I files when the billing batch is finalized. Using a process known as EDI, there is normally no intervention required on your part; the file is sent when you select the option to Create Invoices. The file is then transferred and, within a short time, you will receive a notice from the accepting agency that the file has been received.

### ELECTRONIC REMITTANCES VIA 835 UPLOADS

Billing Manager periodically checks with the funder to see if any payment files are available as a background process. Once they are, Billing Manager automatically downloads the remittance file. Assign a posting date to the file, and Billing Manager automatically matches the payments to the charges and logs any denials.

## ADDITIONAL STRENGTHS OF BILLING MANAGER

### HIGHLY CONFIGURABLE BILLING CODES TO MEET FUNDING SOURCE REQUIREMENTS

With Billing Manager, you have the ability to create billing codes based on funder requirements so you can avoid obstacles that disrupt your billing process.

### USE THE VARIOUS FIELDS TO CREATE THE BILLING CODE YOU NEED USING ANY COMBINATION OF THE FOLLOWING:

- Unit Rates
- Roll-up Methods
- Combine Days of Service Rules
- Rendering Provider IDs
- Facility/Place of Service Codes
- Default ICD-10 Code(s)
- 837 I or P Classification



## SELECT FROM OVER 30 BILLING UNIT TYPES

Billing Manager lets you decide which unit type to bill for, and includes the ability to define additional types. Choose from Full Hours or Quarter Hours that can round down, round to nearest, or round up and bill quarter, half, or full days depending on the number of hours. You can also create your own billing rules for switching between billing quarter hours or full days based on the amount of time a consumer receives services in the day or bill based on Units or Mileage.

### BILL BASED ON MULTIPLE LOCATIONS AND MEDICAID IDENTIFIERS

Each funding source can have its own location and/or Medical Identifiers if required. With the Billing Manager, you won't have to edit the numbers as the correct location after creating a file. Other identifiers are automatically included in the 837 file.

### BILL BASED ON AUTOMATED CALCULATION OF RATIOS BASED ON BILLING CODE

Pre-defined ratios and rates can be added to any billing code. When Ratio Billing is used, Billing Manager calculates the number of consumers with each staff and matches the total consumers to one of the on-file ratios for each 15-minute unit. The rates are automatically selected and billed based on the ratio for that unit. Then, the DSP and number of consumers assigned to them can be displayed in Reports.

## MEDICAID BILLING RULES ENFORCED

Billing Manager adheres to all standard Medicaid requirements set forth by CMS and allows for state-level modifications. Manage authorization utilization using dashboard-based information. The Authorization Utilization Exception tile displays a count of how many consumers are at risk for under or over-utilizing authorizations. Click the tile to see the specifics about the consumer, the +/- amounts as well as a handy index that indicates the individual's utilization.

The extensive reporting feature allows you to select from over 40 standard reports to research utilization, payments and denials, invoice details, ratio billing, percentage of community services and financial information for your accounting team.



