Did you bill for the services provided in (PATIENT NAME)’s home during the calendar year 2020 by month, by 60-day period, or by week?

BY MONTH = 1
BY 60-DAY PERIOD = 2
BY SOME OTHER PERIOD?
(USE THIS RESPONSE ONLY IF PROVIDER ABSOLUTELY CANNOT CALCULATE COSTS BY MONTH) = 3
BY WEEK = 4

(IF SOME OTHER PERIOD: What was that?)

DK/REF – CONTINUE TO D1
VISIT DATE

D1. During calendar year 2020, what (was the (first/next) month/was the begin/was the end date) of the (first/next) 60-day period/(was the begin/was the end) date of the (first/next) OTHER PERIOD/(was the begin/was the end date of the (first/next) weekly period) during which your records show that services were provided in (PATIENT NAME)’s home?

REFERENCE PERIOD – CALENDAR YEAR 2020

MONTH:

Month: _____
Year: _______

OR

BEGIN DATE:

MM/DD/YYYY
Y

END DATE:

MM/DD/YYYY
Y

DCS: ENTER A DATE IN FORMAT MM/DD/YYYY. INCLUDE LEADING 0’s FOR SINGLE DIGIT MONTHS AND DAYS.

DK/REF – CONTINUE TO D2

SERVICES/CHARGES

D2. I need to know which type or types of persons provided services at (PATIENT NAME)’s home (during (MONTH)/from (BEGIN DATE) through (END DATE)) and either the number of hours or the number of visits for each type.

SELECT ONE; PROBE AS NEEDED.

EXPLAIN IF NECESSARY: By type of person I mean a housekeeper, therapist, nurse aide, yard worker, and so forth.

1. HOME HEALTH AID

   HOURS/MINUTES_____ OR VISITS_____ 

2. HOMEMAKER

   HOURS/MINUTES_____ OR VISITS_____
3. I.V./INFUSION THERAPIST
   HOURS/MINUTES_____OR VISITS_____

4. NURSE/NURSE PRACTITIONER
   HOURS/MINUTES_____OR VISITS_____

5. NURSE’S AIDE
   HOURS/MINUTES_____OR VISITS_____

6. OCCUPATIONAL THERAPIST
   HOURS/MINUTES_____OR VISITS_____

7. PERSONAL CARE ATTENDANT
   HOURS/MINUTES_____OR VISITS_____

8. PHYSICAL THERAPIST
   HOURS/MINUTES_____OR VISITS_____

9. RESPIRATORY THERAPIST
   HOURS/MINUTES_____OR VISITS_____

10. SOCIAL WORKER
    HOURS/MINUTES_____OR VISITS_____

11. SPEECH THERAPIST
    HOURS/MINUTES_____OR VISITS_____

12. YARD WORKER
    HOURS/MINUTES_____OR VISITS_____

13. DRIVER
    HOURS/MINUTES_____OR VISITS_____

14. BABYSITTER
    HOURS/MINUTES_____OR VISITS_____
D3. I need a description of the services provided (during (MONTH)/from (BEGIN DATE) through (END DATE)).

CLEANING OR YARD WORK
YES=1, NO=2

TRANSPORTATION
YES=1, NO=2

SHOPPING
YES=1, NO=2

EMOTIONAL SUPPORT PERSON OR
ONE-ON-ONE BUDDY
YES=1, NO=2

SUPPORT GROUPS
YES=1, NO=2

CHILD CARE
YES=1, NO=2

OTHER (SPECIFY): ________
YES=1, NO=2

(IF OTHER WHAT WAS THAT?)

ANY MORE TYPES OF HOME CARE PERSONS PROVIDING SERVICES?
YES=1, NO=2

D2 - DK/REF – CONTINUE TO D3
D3 – DK/REF– CONTINUE TO C2

C2. What were the charges for the services provided to (PATIENT NAME) (during (MONTH)/from (BEGIN DATE) through (END DATE))?  

IF NO CHARGE: Some facilities that don't charge for each individual service do associate dollar amounts with services for purposes of budgeting or cost analysis. This is sometimes called a "charge equivalent". Could you give me the charge equivalents for these services?

VERIFY: Is this the total charge for (this/these) service(s)? IF NOT, RECORD TOTAL CHARGE.

NOTE: WE NEVER ENTER $0 FOR A CHARGE

TOTAL CHARGES: $ ________.
C2 - DK/REF – CONTINUE TO C4a

**SOURCES OF PAYMENT**

**C4a.** From which of the following sources did your organization receive payment for the charges (for (MONTH)/from (BEGIN DATE) through (END DATE)) and how much was paid by each source? Please include all payments that have taken place between (MONTH/BEGIN DATE) and now for this care. IF NONE, ENTER ZERO (0).

SELECT ALL THAT APPLY

[DCS ONLY] IF NAME OF INSURER, PUBLIC, OR HMO, PROBE: And is that Medicare, Medicaid, or private insurance?

**OTHER SPECIFY:** PROBE FOR SOURCE OF FUNDS AND TYPE OF PLAN.

IF THE ONLY PAYMENT FOR THIS EVENT WAS A LUMP SUM, ANSWER “NO” HERE.

a. Patient or Patient’s Family ...... $ __________.____
b. Medicare .................................... $ __________.____
c. Medicaid .................................... $ __________.____
d. Private Insurance ....................... $ __________.____
e. VA/Champva .............................. $ __________.____
f. Tricare ...................................... $ __________.____
g. Worker’s Comp; ....................... $ __________.____
h. Or something else? .................... $ __________.____
   (IF SOMETHING ELSE: What was that? ______________)

C4a(h) – “Other Specify” menu

Auto or Accident Insurance
Indian Health Service
State Public Mental Plan
State/County Local program
Other

C4a - DK/REF – CONTINUE TO C5

**C5.** I show the total of all payments received for (MONTH) / (BEGIN DATE) through (END DATE)) as [SYSTEM WILL COMPUTE AND DISPLAY TOTAL]. Is that correct?

IF NO, CORRECT PREVIOUS ENTRIES AS NEEDED.

YES = 1
NO = 2

C5 – IF RESPONSE = 2, DISPLAY HARD CHECK: “IF INCORRECT, CORRECT ENTRIES AS NEEDED.”

**VERIFICATION OF PAYMENT**

**C5a.** I recorded that the payment(s) you received equal the charges. I would like to make sure that I have this recorded correctly. I recorded that the total payment is [SYSTEM WILL DISPLAY TOTAL PAYMENT FROM C5]. Does this total payment include any other amounts such as adjustments or discounts, or is this the final payment?
IF NECESSARY, READ BACK AMOUNT(S) RECORDED IN C4a.
YES, FINAL PAYMENTS RECORDED IN C4a AND C5 = 1 (GO TO LUMP SUM PAYMENT QUESTION)
NO = 2 (GO BACK TO C4a)

PAYMENTS LESS THAN CHARGES *(UNDERPAYMENT)*

PLC1. It appears that the total payments were less than the total charge. Is that because...

a. There were adjustments or discounts ...... YES=1 NO=2
b. You are expecting additional payment..... YES=1 NO=2
c. This was charity care or sliding scale ...... YES=1 NO=2
d. This was bad debt.............................. YES=1 NO=2
e. Person is an eligible veteran............... YES=1 NO=2

DIFFERENCE BETWEEN PAYMENTS AND CHARGES

Are you expecting additional payment from:
IF THE ONLY PAYMENT FOR THIS EVENT WAS A LUMP SUM, ANSWER “NO” TO ALL OPTIONS

Expecting additional payment

i. Patient or Patient’s Family?...............YES=1 NO=2
j. Medicare?.....................................YES=1 NO=2
k. Medicaid?.....................................YES=1 NO=2
l. Private Insurance?.........................YES=1 NO=2
m. VA/Champva?..............................YES=1 NO=2
n. Tricare?.......................................YES=1 NO=2
o. Worker’s Comp?.........................YES=1 NO=2
p. Something else .........................YES=1 NO=2
   (IF SOMETHING ELSE: What was that?_______________)

ADJEXTRA

It appears that the total payment was more than the total charges. Is that correct?

    YES = 1
    NO = 2

DCS: IF THE ANSWER IS "NO" PLEASE GO BACK TO C5 (VERIFY TOTAL PAYMENTS) TO RECONFIRM CHARGES AND PAYMENTS AS NEEDED.

LUMP SUM PAYMENTS

LSPCHECK
WAS THIS EVENT COVERED BY A LUMP SUM?

    YES = 1
    NO = 2

DK/REF ALLOWABLE and SKIP TO END OF EVENT FORM
FINISH SCREEN

ENTER 1 TO FINALIZE CASE.