

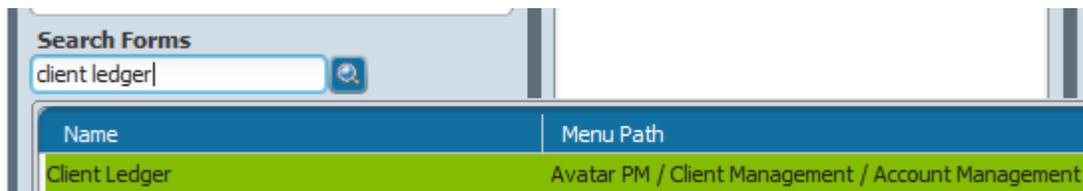


Checking if a service is in Open status

The purpose of this desk reference is to provide guidance on how to check if a service is in an Open status before proceeding with any Progress Note corrections. Services must be in an Open status when correcting or voiding a note to ensure that HHSA Fiscal has not submitted a claim to the state. A note should never be altered or voided after payment has been received from the state. If note needing correction is NOT in an Open status, contact the HHSA Fiscal department.

Menu Path

1. Menu path for users **with** access to the Client Ledger form: Avatar PM > Client Management > Account Management > Client Ledger or type “Client Ledger” in the Search Forms field:



2. Menu path for users **without** access to the Client Ledger form: Avatar PM > Services > Outpatient Services > Edit Service Information or type “Edit Service Information” in the Search Forms field:



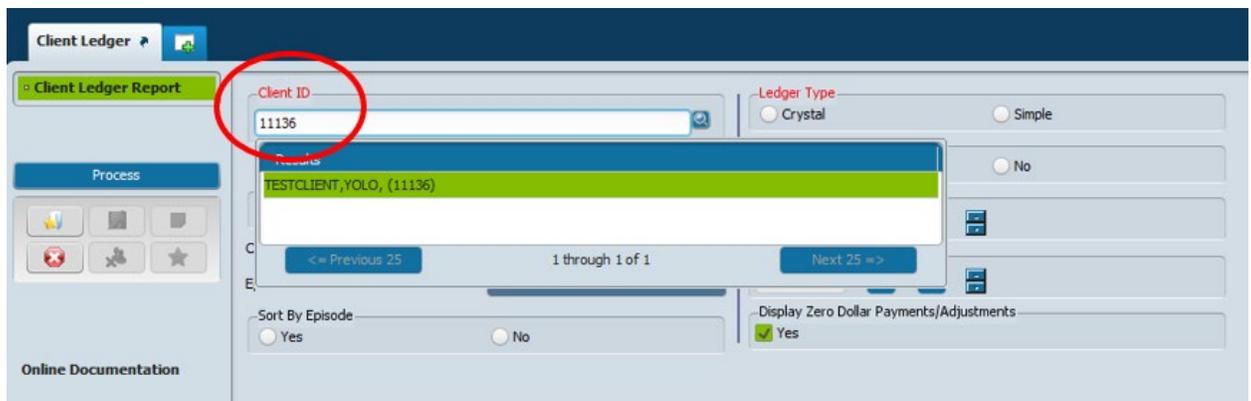
Details

1. Only users who have access to the Edit Service Information or Client Ledger forms will be able to check for an Open status.
2. The results of the check will determine the course of action regarding the correction. If the user discovers the service is in an Open status, they may proceed with the correction. If the user sees any status other than Open (examples: Closed, Billed or Claimed) they should not proceed with the correction and consult HHSA Fiscal.

Steps for Client Ledger

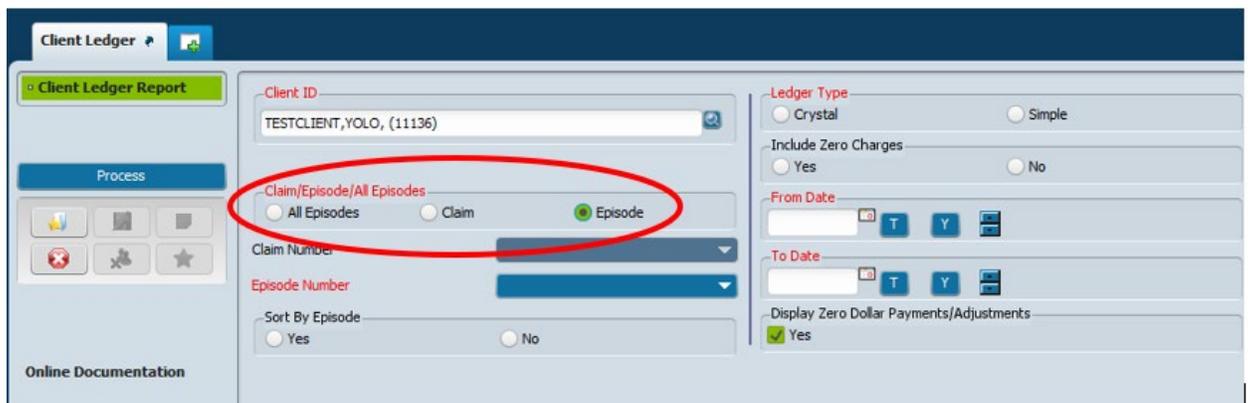
➤ Open the Client Ledger form.

1. In the Client ID field enter the medical record number or client last name, first. Double click on your selection.



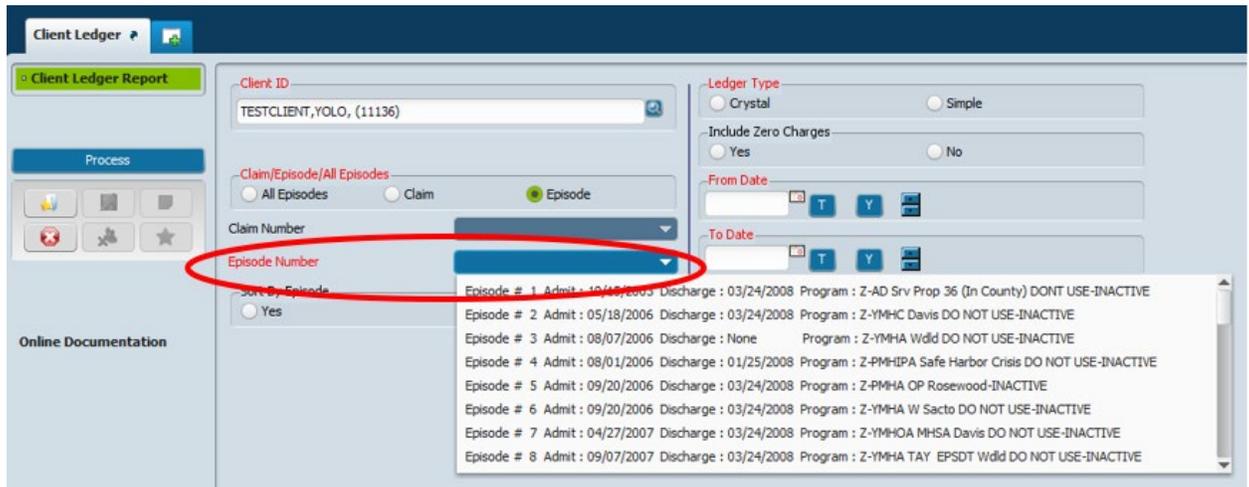
The screenshot shows the 'Client Ledger' form. The 'Client ID' field is highlighted with a red circle and contains the text '11136'. A dropdown menu is open below the field, showing a single result: 'TESTCLIENT, YOLO, (11136)'. The 'Ledger Type' section has radio buttons for 'Crystal', 'Simple', and 'No'. The 'Display Zero Dollar Payments/Adjustments' checkbox is checked. The 'Sort By Episode' section has radio buttons for 'Yes' and 'No'.

2. In the Claim/Episode/All Episodes field select Episode.

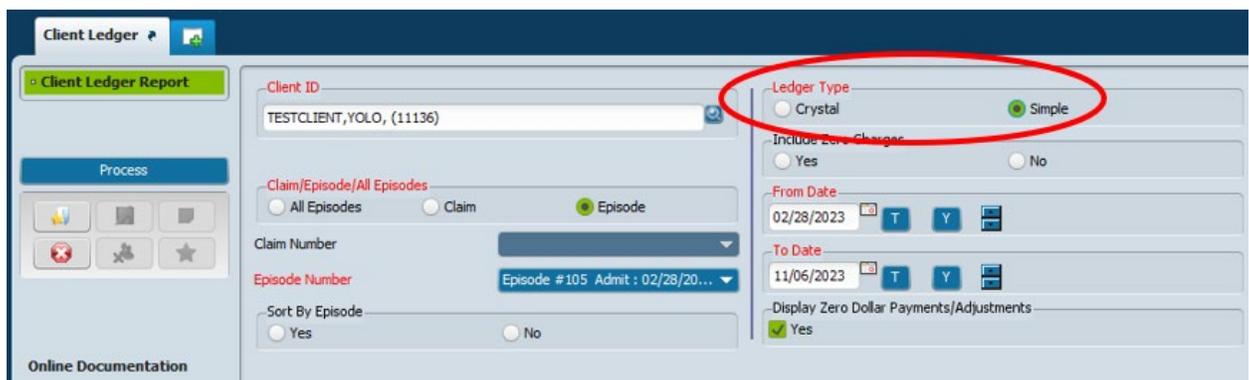


The screenshot shows the 'Client Ledger' form with the 'Client ID' field now containing 'TESTCLIENT, YOLO, (11136)'. The 'Claim/Episode/All Episodes' section is highlighted with a red circle and shows three radio buttons: 'All Episodes', 'Claim', and 'Episode'. The 'Episode' radio button is selected. The 'Claim Number' and 'Episode Number' dropdown menus are visible below. The 'Ledger Type' section has radio buttons for 'Crystal' and 'Simple'. The 'Include Zero Charges' section has radio buttons for 'Yes' and 'No'. The 'From Date' and 'To Date' fields are empty. The 'Display Zero Dollar Payments/Adjustments' checkbox is checked. The 'Sort By Episode' section has radio buttons for 'Yes' and 'No'.

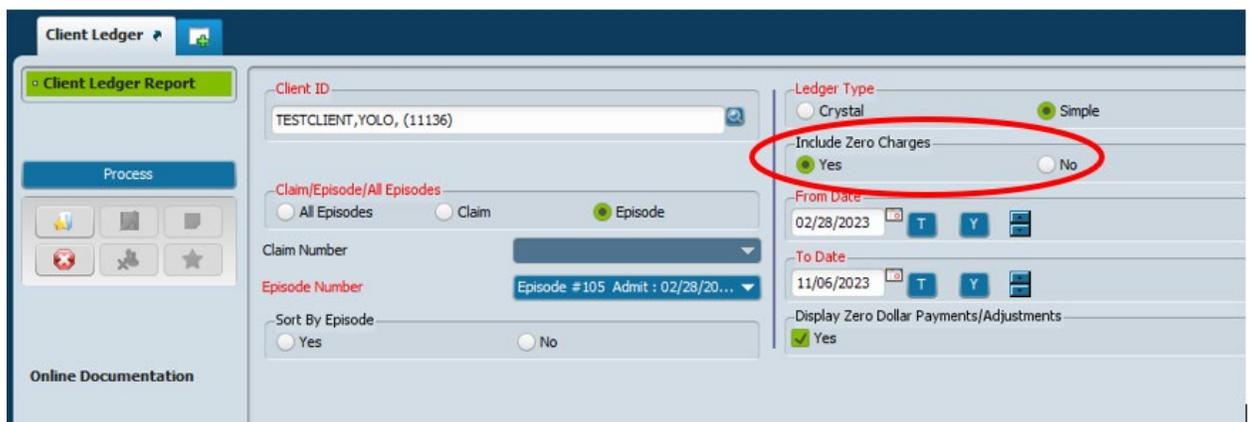
3. In the Episode Number drop down, select the episode.



4. In the Ledger Type field, click Simple.



5. In the Include Zero Charges field, click Yes.



- In the From Date field, enter the search start date. In the To Date field, enter the search end date.

The screenshot shows the 'Client Ledger Report' form. The 'Client ID' is 'TESTCLIENT, YOLO, (11136)'. The 'Ledger Type' is 'Simple'. The 'Include Zero Charges' is 'Yes'. The 'From Date' is '02/28/2023' and the 'To Date' is '11/06/2023'. The 'Claim/Episode/All Episodes' section has 'Episode' selected. The 'Episode Number' is 'Episode #105 Admit : 02/28/20...'. The 'Sort By Episode' is 'No'. The 'Display Zero Dollar Payments/Adjustments' is 'Yes'. A red circle highlights the 'From Date' and 'To Date' fields.

- Click Process.

The screenshot shows the 'Client Ledger Report' form with the 'Process' button highlighted by a red circle. The form fields are the same as in the previous screenshot.

- Ledger will display, confirm Open status in the Claim Number column.

The screenshot shows the 'Client Ledger' report for 'TESTCLIENT, YOLO'. The report displays a table of episodes with columns: EPISODE NUMBER, DATE, SERV, UNT, CHG, GUAR, GUARANTOR LIABILITY, AMOUNT RCVD, POSTING CODE, POSTING CODE TYPE, DATE POSTED, DATE BILLED, CLAIM NUMBER, and LINE BALANCE. The 'CLAIM NUMBER' column contains the word 'OPEN' for all 10 episodes, which is highlighted by a red box. Below the table, there is a 'GRAND TOTAL' of 0.00 and a 'TOTAL BALANCE BY GUARANTOR' section showing '1) CSM Default Payor' with a balance of 0.00.

EPISODE NUMBER	DATE	SERV	UNT	CHG	GUAR	GUARANTOR LIABILITY	AMOUNT RCVD	POSTING CODE	POSTING CODE TYPE	DATE POSTED	DATE BILLED	CLAIM NUMBER	LINE BALANCE
1	105 02012023	YASSENMH	15.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
2	105 08012023	T1017MH	4.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
3	105 09012023	9083SMH	1.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
4	105 09152023	H0021MH	8.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
5	105 10012023	90791MH	1.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
6	105 10012023	T101SMH	1.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
7	105 10012023	H0021MH	3.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
8	105 10092023	YASSENMH	60.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
9	105 11012023	YREHAMMH	50.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00
10	105 11062023	H2017MH	3.00	0.00	99999	0.00	-----	-----	-----	-----	-----	OPEN	0.00

(GRAND TOTAL: 0.00)

TOTAL BALANCE BY GUARANTOR

1) CSM Default Payor 99999: 0.00

Steps for Edit Service Information

- Open the Edit Service Information form.
 1. Enter the “Client ID”, select the “Episode Number” in which the note was filed and enter the “Service Start Date” then click “Select Service(s) To Edit”

TESTCLIENT, YOLO (000011136)
Preferred Name: George
Personal Pronouns: He/Him/His
F, 11, 03/13/2012

Ep: -
Problem P: -
DX P: -
Phone #: 530-666-6666

Edit Service Information

Client ID: TESTCLIENT, YOLO, (11136)

Service Start Date: 09/01/2023

Service End Date: [Empty]

Episode Number: Episode # 97 Admit : 08/17/2022 Discharge : None Program : 1...

Service Selection Default: All None

Select Service(s) To Edit

Episode Number (Edit): [Dropdown]

Service Code: [Text]

Practitioner: [Text]

Modifiers: [Text]

2. Locate the service that needs to be changed from the displayed list. Look at the Status column to determine status.

myAvatar 2023 - Select Service(s) To Edit

Client: TESTCLIENT, YOLO (11136)
Episode Number: 105

Service Date	Service Code	Program	Practitioner	Status	Document	Claim Number
<input type="checkbox"/> 10/01/2023	90791MH	HPE-15-001	JOHNSON, TIMOTHY LE	Open	-	-
<input type="checkbox"/> 10/01/2023	H0031MH	HPE-15-001	JOHNSON, TIMOTHY LE	Open	-	-
<input type="checkbox"/> 10/09/2023	YASSESMH	HPE-15-001	TORMEY, TIMOTHY JOH	Open	-	-
<input type="checkbox"/> 11/01/2023	YREHABMH	HPE-15-001	JOHNSON, TIMOTHY LE	Open	-	-
<input type="checkbox"/> 11/06/2023	H2017MH	HPE-15-001	LARSON, JUSTINA ANN	Open	-	-

OK Cancel