PRIMARY SOLUTIONS

Setup Patient Liability

Other Source window:

- Open the Consumers module and then the Other Source window
- Click on the NEW button
- Define each parameter:
  - Consumer - pick the appropriate consumer from the drop down
  - Funding Source - select your waiver funding source
  - Code - select '1' for patient liability
  - Amount of Liability - enter the amount to be deducted each month
  - Year - verify the year
  - Select Months - click on each month that the patient liability should be deducted
- Click OK
- Save and close the Other Source window

Services window:

- Open the Billing module and then go to the Services window
- Filter or find the Billing code where Patient Liability is needed to pull from
- On the 'Detail' tab of the Service code, select the 'Applicable for Patient Liability' checkbox.

Adding Patient Liability to Existing Billing:

- Open the Billing module and then the View Billing window
- Filter the billing parameters to display:
  - Consumer Name - Select the consumer whose patient liability is being adjusted
  - Funding Source - select your waiver funding source
  - Invoiced - select YES
  - Billing Date Range - enter the month that is being adjusted

- Click on the Detail tab of the first row needing the patient liability attached
- Enter a dollar amount, not greater than the invoiced amount for that row of billing, in the Other Source Amt. field.

  *Example: If the Patient Liability amount is $125 and each row of billing has invoiced $50, enter $50 on the first two billing rows and $25 on the third row to total $125.
- Click on the List tab and a message will come up asking if you want to set this record to re-transmit and change payment status if the record is already 'Paid'. Check the boxes and select YES.
- Continue down each row of billing until the total patient liability for the month is entered.
- Save and close the View Billing window.
- Create the transmission file
  - Open the Invoices & Transmissions folder and then the Create Transmission Files window
  - Define the following parameters:
  - Funding Source - select your waiver funding source
  - Consumer Number - Select the consumer whose patient liability is being adjusted
  - Billing Date Range - enter the month that is being adjusted
  - Include Paid Records - Check this box if the patient liability was attached to records that have a payment status other than 'Unpaid'
  - Select Create
  - Follow the rest of the create transmission file step and upload the transmission file to the state.