

## Export & Import Process for Billing Matrix Rate Changes

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## INTRODUCTION:

This document provides a step-by-step process for creating new **Billing Matrix** lines needed due to periodic payer or agency rate changes using the Credible **Export Tool** and **Import Tool** functionalities.

This process should be used only when there are a large number of Billing Matrix records that need to be expired and copied for rate changes. This process requires a minimum of 2 Exports and 3 Imports to complete the rate changes. 1 additional Export and Import each will also be needed if **Payer Specific Rate & Codes** and/or **Payer/Dx Specifics** are used within any of the needed Billing Matrix lines.

### IMPORTANT WARNING:

**If the steps outlined in this document are completed incorrectly, it could severely and negatively impact your agency billing. Please enter a Task Ticket requesting a review with a Billing Specialist prior to attempting your first Billing Matrix import.**

If a smaller number of Billing Matrix lines require updating, Credible's best practice recommendation is to use the Billing Matrix record's **Copy New Entry** feature accessible from the bottom of the Billing Matrix form. This feature copies ALL of the defined data within the Billing Matrix line, including **Allowed Payers**, **Payer Specific Rate & Codes** and **Payer/Dx Specifics** and requires no other manual Export or Import process.

Steps to Expire Old and Create New Billing Matrix lines for Rate Changes:

1. Select Billing Tab > Billing Config > Billing Matrix
2. Select "Edit" on desired Matrix ID
3. Enter 'Expiration Date' (one day prior to effective date of new record)
4. Select "Save Settings"
5. Select "Edit" Again for the now expired Billing Matrix line
6. Select "Copy New Entry" (at bottom of page)
7. Update the 'Effective Date' and 'Expiration Date'
8. Update the Rate field(s) (these may be in 'Payer Specifics Rates & Codes' as well as the main form )
9. Make any other needed updates
10. Select "Save Settings"

## A. EXPORT THE MAIN FORM OF THE BILLING MATRIX LINES TO BE REPLACED:

In Reports > Export Tool:

- 1) Create an Export Tool for the **BillingMatrix** table called 'BillingMatrix for Rate Changes' (or similar):

17	SNP-Form Est	CUSTOM	CS	
18	SNP-Forms Dictionary	CUSTOM	CS	
16	SNP-Episodes	CUSTOM	CS	
14	SNP-Partner Config	CUSTOM	CS	AccountingPeriod
11	SNP-Credentials	CUSTOM	CS	AdminTime
12	SNP-Data Dictionary	CUSTOM	CS	AdminTimeTypes
10	SNP-Custom Lookup Categories	CUSTOM	CS	Answer
9	SNP-Locations	Location	CS	ApprovalRole
8	SNP-Programs	CUSTOM	CS	Assets
7	SNP-Payers	CUSTOM	CS	Authorizations
4	SNP-Profile	CLIENT	HT	Axis1
3	Unmatched Ledger Lines	CUSTOM	HT	BedBoardFacility
				BedBoardRoom
				BillingCodes
				<b>BillingMatrix</b>
				BillingMatrixPayer
				BillingMatrixPayers

New Export    Export Name: BillingMatrix For Rate C    Form / Table Name: BillingMatrix

Custom Query: \_\_\_\_\_

- a. Select ALL Billing Matrix table fields by checking the **BillingMatrix** checkbox in the **Export Fields** area:

**Export Builder: BillingMatrix**

Export Name:  Export Format:  Quoted Fields:

Delimiter:  Batch Mode:

Date Format:  (ie. MM-DD-YYYY HH:NN) For Template Printout:

Lock Export:  Show on Reports Tab:

Category:  Is Advanced Search:

Can Unbatch Exported Items:

Pre-Query:

Where Clause:

Custom Param 1:  Param 2:  Param 3:

Notes:

- Export Fields**
- BillingMatrix
  - visittype\_id
  - payertype\_id
  - description
  - cpt\_4\_code
  - other\_code
  - modifier
  - modifier2
  - modifier3
  - modifier4
  - program\_id
  - external\_code

- b. Select **Next Step** and **Reorder** the columns, as desired. (Note: Reordering the column sequence is not required.)
  - c. Select **Finish** to complete the creation of the Billing Matrix Export tool that includes ALL of the 'Main Form' Billing Matrix options.
- 2) Run the new 'BillingMatrix for Rate Changes' Export to return **all Billing Matrix lines** in the domain.

**NOTE:** Export in **Delimited (CSV)** and check **Header Row** checkbox.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1	visittype_id	payertype_id	description	cpt_4_code	other_code	modifier	modifier2	modifier3	modifier4	program_id	external_code	location_id	recipient_id	credential_group	em_code	multiple_flag	start_length_min	end_length_min	start_date	
2	11		GROUP THERAPY - Outpatient	90853							2							8	1440	5/1/2016
3	11		GROUP THERAPY - Outpatient - NB	90853-NB							2							1	7	5/1/2016
4	11		GROUP THERAPY - CTSS	90853		UA					19		14					8	1440	5/1/2016
5	11		GROUP THERAPY - CTSS - NB	90853-NB							19		14					1	7	5/1/2016
6	11		GROUP THERAPY - ChildDayTx	90853		UA					21		14					8	1440	5/1/2016
7	11		GROUP THERAPY - ChildDayTx - NB	90853-NB							21		14					1	7	5/1/2016
8	46		DBT GROUP	90853							5							8	1440	5/1/2016
9	46		DBT GROUP	90853-NB							5							1	7	5/1/2016
10	45		DBT INDIVIDUAL	90834							5							8	52	5/1/2016
11	45		DBT INDIVIDUAL	90834-NB							5							1	7	5/1/2016
12	35		TRAVEL - ARMHS	H0046							6							0	1440	5/1/2016
13	35		TRAVEL - CRISIS	H0046							18							0	1440	5/1/2016
14	35		TRAVEL - CTSS	H0046							19							0	1440	5/1/2016
15	30		CHILD DAY TREATMENT	H2012		UA	HK				21							30	1440	5/1/2016
16	30		CHILD DAY TREATMENT - NB	H2012-NB							21							1	29	5/1/2016
17	84		E&M Est - RN - Level 1	99211							3			11	1			1	1440	5/1/2016
18	84		E&M Est - APRN - Level 2	99212							3			13	2			1	1440	5/1/2016
19	84		E&M Est - APRN - Level 2	99212							3			24	2			1	1440	5/1/2016
20	84		E&M Est - APRN - Level 2	99212							3			25	2			1	1440	5/1/2016
21	84		E&M Est - APRN - Level 2 (Televideo)	99212		GT					3			13	2			1	1440	5/1/2016
22	84		E&M Est - APRN - Level 2 (Televideo)	99212		GT					3			13	2			1	1440	5/1/2016

## B. PREPARE THE NEW BILLING MATRIX LINE IMPORT DATA:

Within the .CSV file created in Step 2:

- 3) Select **Filter** from the **DATA** tab to allow filtering of desired Billing Matrix lines.

**HINT:** To make working with the spreadsheet simpler, it is recommended to 'delete' any columns that return ONLY 'Blanks' and ONLY '0', as these settings have not been used in your current configuration.

- 4) Filter for the current Billing Matrix lines that are to be expired and replaced with new records for the new Rates.

**In this example:** We are replacing all the current 'billable' Billing Matrix lines for Program ID '10', so we have filtered on the program\_id (10 only), non\_billable (0s only) and end\_date (blanks only) columns to return only the records that need to be replaced.

**HINT:** Copy the filtered records to a new .csv (comma delimited) worksheet and once again 'delete' any additional columns that return ONLY 'Blanks' and ONLY '0', as these settings have not been used in the current configuration for these specific records.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z			
1	visittyp	description	cpt_4	modifier	program	recipient	credent	start	length	end	start	rate	unit	fixec	first	unit	unit	claim	update	rollup	roll	mont	force	merge	ba	billing	group	id
2	15	INTERPRET T1013			10			8	1440	5/1/2016	1	34.75	1	22.5	15	1	P		1								201	34.75
3	37	CM FACE T12023	HE		10			1	254	5/1/2016	0	203.88	1				P		1	CMA	1	1	1	1	3	351	203.88	
4	37	CM FACE T12023	HE		10			255	614	5/1/2016	0	203.88	1				P		1	CMA	1	1	1	1	3	352	203.88	
5	37	CM FACE T12023	HE		10			615	44640	5/1/2016	0	203.88	1				P		1	CMA	1	1	1	1	3	353	203.88	
6	38	CM PHON T2023	HE	U4	10	2		1	1440	5/1/2016	0	203.88	1				P		1	CMA	1	1	1	1	3	354	203.88	
7	69	PRE-PETIT NA			10			26	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							360	34.75
8	69	PRE-PETIT NA			10			4	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							361	34.75
9	69	PRE-PETIT NA			10			6	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							362	34.75
10	69	PRE-PETIT NA			10			8	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							363	34.75
11	69	PRE-PETIT NA			10			21	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							364	34.75
12	69	PRE-PETIT NA			10			27	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							365	34.75
13	69	PRE-PETIT NA			10			35	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							366	34.75
14	69	PRE-PETIT NA			10			15	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							367	34.75
15	69	PRE-PETIT NA			10			16	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							368	34.75
16	69	PRE-PETIT NA			10			17	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							369	34.75
17	69	PRE-PETIT NA			10			18	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							370	34.75
18	69	PRE-PETIT NA			10			19	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							371	34.75
19	69	PRE-PETIT NA			10			20	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							372	34.75
20	69	PRE-PETIT NA			10			28	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							373	34.75
21	69	PRE-PETIT NA			10			29	8	1440	5/1/2016	0	34.75	1	22.5	15	1	P		1							374	34.75
22	183	MILEAGE MILEAGE			10			0	1440	5/1/2016	0	0.54	1	1.5	1	1	P		0								895	0.54

- 5) Update the rate and start\_date columns, as needed, for the new Billing Matrix lines.

**NOTE:** Be sure to save the "matrix\_id" values for these rows, as we will be expiring these Billing Matrix lines in an upcoming step.

**NOTE:** If 'deaf\_rate' is used, update these rates as needed as well.

**NOTE:** If there are any Billing Matrix lines in your worksheet that DO NOT need new rates, delete these rows now.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X				
1	visittyp	description	cpt_4	modifier	program	recipient	start	length	end	start	rate	unit	fixec	first	unit	unit	claim	update	rollup	roll	mont	force	merge	ba	billing	group	id
2	15	INTERPRETER SERVICE - Licensed	T1013		10		8	1440	1/1/2017	1	35.25	1	22.5	15	1	P		1									3
3	37	CM FACE TO FACE (Adult)	T2023	HE	10		1	254	1/1/2017	0	210.33	1					P		1	CMA	1	1	1	1	1	3	
4	37	CM FACE TO FACE (Adult)	T2023	HE	10			255	614	1/1/2017	0	210.33	1				P		1	CMA	1	1	1	1	1	3	
5	37	CM FACE TO FACE (Adult)	T2023	HE	10			615	44640	1/1/2017	0	210.33	1				P		1	CMA	1	1	1	1	1	3	
6	38	CM PHONE (Adult)	T2023	HE	U4	10	2	1	1440	1/1/2017	0	210.33	1				P		1	CMA	1	1	1	1	1	3	
7	183	MILEAGE	MILEAGE		10			0	1440	1/1/2017	0	0.54	1	1.5	1	1	P		0								0

## C. IMPORT NEW BILLING MATRIX LINES (WITH UPDATED RATES & DATES):

In Reports > Import Tool:

- 6) Create an Import Tool (or update an existing one) for the **BillingMatrix** table to create the new Billing Matrix lines with updated **Rates** and **Start Date** (Billing Matrix Import - New Records):

15	Impc	BillingCodes	CSV	POST	3/30/15 11:55 AM	10/6/15 7:23 AM (jpiwko)	<a href="#">edit</a>	<a href="#">delete</a>	<a href="#">run</a>
14	Clie	BillingMatrix	CSV	POST	3/30/15 11:01 AM	11/29/15 12:54 PM (jpiwko)	<a href="#">edit</a>	<a href="#">delete</a>	<a href="#">run</a>
12	Clie	BillingMatrixPayer	CSV	POST	3/30/15 10:27 AM	9/24/16 9:25 PM (jgrant)	<a href="#">edit</a>	<a href="#">delete</a>	<a href="#">run</a>
11	Tea	BillingMatrixPayers	CSV	POST	3/30/15 10:23 AM		<a href="#">edit</a>	<a href="#">delete</a>	<a href="#">run</a>
10	Clie	BillingMatrixPayerType	CSV	POST	3/30/15 10:21 AM	12/10/15 6:31 AM (jpiwko)	<a href="#">edit</a>	<a href="#">delete</a>	<a href="#">run</a>
9	Emp	BillingMatrixRevCode	CSV	POST	3/27/15 3:55 PM	8/2/16 1:58 PM (aahmed)	<a href="#">edit</a>	<a href="#">delete</a>	<a href="#">run</a>
6	Pay	ChangeLog	CSV	POST	9/23/14 1:36 PM	7/11/16 5:15 PM (jgrant)	<a href="#">edit</a>	<a href="#">delete</a>	<a href="#">run</a>
		ClientAllergy							
		ClientAxis							

Table: AccountingPeriod Format: Comma Separated Add New Import

- a. Check all data elements/**Column Labels** that are left in the worksheet completed in Step #5 and select **Next Step**:

**NOTE:** Data elements that are always required for new Billing Matrix line imports are:

visittype\_id  
 description  
 cpt\_4\_code or other\_code  
 start\_length\_min  
 end\_length\_min (required for ALL Billing Matrix imports)  
 start\_date  
 rate  
 unit\_fixed  
 claim\_format  
 update\_cpt\_onscascade

Import Name: Billing Matrix Import - New Records

Format: Delimited Delimiter (CSV): ; Parent XML Element:

Allow Invalid Fields:  Add/Delete Column:  Replace/Delete ALL:

Use External ID:  Use Internal ID:

Pre Query:

Post Query:

Select all columns that will be in the import file:

<input checked="" type="checkbox"/> visittype_id	<input checked="" type="checkbox"/> update_cpt_onscascade
<input type="checkbox"/> payerype_id	<input type="checkbox"/> override_eoi_location
<input checked="" type="checkbox"/> description	<input type="checkbox"/> send_rendering
<input checked="" type="checkbox"/> cpt_4_code	<input type="checkbox"/> approval_as_service_date
<input type="checkbox"/> other_code	<input checked="" type="checkbox"/> rollup_code
<input checked="" type="checkbox"/> modifier	<input type="checkbox"/> rollup_gap_max
<input checked="" type="checkbox"/> modifier2	<input type="checkbox"/> sum_code
<input type="checkbox"/> modifier3	<input type="checkbox"/> sum_emp_only
<input type="checkbox"/> modifier4	<input type="checkbox"/> sum_units_with_roll
<input checked="" type="checkbox"/> program_id	<input checked="" type="checkbox"/> roll_month
<input type="checkbox"/> external_code	<input type="checkbox"/> roll_week
<input type="checkbox"/> location_id	<input type="checkbox"/> roll_week_start_day
<input checked="" type="checkbox"/> recipient_id	<input type="checkbox"/> roll_week_eom
<input type="checkbox"/> credential_group	<input type="checkbox"/> roll_auth
<input type="checkbox"/> em_code	<input type="checkbox"/> Rollup_Episode
<input type="checkbox"/> multiple_flag	<input type="checkbox"/> bill_roll_end_date
<input checked="" type="checkbox"/> start_length_min	<input type="checkbox"/> rollup_custom
<input checked="" type="checkbox"/> end_length_min	<input checked="" type="checkbox"/> force_as_primary
<input checked="" type="checkbox"/> start_date	<input type="checkbox"/> roll_xdays
<input type="checkbox"/> end_date	<input type="checkbox"/> roll_consecutive_to_limit
<input checked="" type="checkbox"/> is_splitsecondary	<input checked="" type="checkbox"/> merge_batched
<input checked="" type="checkbox"/> rate	<input type="checkbox"/> subtract_overlapping
<input type="checkbox"/> contract_rate	<input type="checkbox"/> subtract_overlapping_units
<input checked="" type="checkbox"/> unit_fixed	<input type="checkbox"/> can_overlap
<input checked="" type="checkbox"/> first_unit_min	<input type="checkbox"/> auto_approve
<input checked="" type="checkbox"/> unit_min	<input type="checkbox"/> auth_required
<input checked="" type="checkbox"/> unit_count	<input type="checkbox"/> force_client_pay
<input type="checkbox"/> overproduction_units	<input checked="" type="checkbox"/> billing_group_id
<input type="checkbox"/> overproduction_code	<input type="checkbox"/> non_billable
<input type="checkbox"/> overproduction_period	<input type="checkbox"/> matrix_id
<input type="checkbox"/> overproduction_start_day	<input type="checkbox"/> Transportation
<input type="checkbox"/> overproduction_start_date	<input type="checkbox"/> deaf_rate
<input type="checkbox"/> contract_flag	<input type="checkbox"/> revenue_code_837i
<input checked="" type="checkbox"/> claim_format	<input type="checkbox"/> location_default
<input type="checkbox"/> use_provider_for_rendering	<input type="checkbox"/> location_is_pos
<input type="checkbox"/> override_crossover_secondary	<input type="checkbox"/> is_op_837i

- b. Verify that the Column Headings appear in the same order as your import worksheet columns (i.e. - **Reorder**, as needed) and select **Finish**:

Import Details: BillingMatrix - Billing Matrix Import - New Records

Column Order	Column	SQL Transform (%col%)
1	visitype_id	
2	description	
3	cpt_4_code	
4	modifier	
5	modifier2	
6	program_id	
7	recipient_id	
8	start_length_min	
9	end_length_min	
10	start_date	
11	is_splitsecondary	
12	rate	
13	unit_fixed	
14	first_unit_min	
15	unit_min	
16	unit_count	
17	claim_format	
18	update_cpt_onscascade	
19	rollup_code	
20	roll_month	
21	force_as_primary	
22	merge_batched	
23	billing_group_id	

- 7) Import the new Billing Matrix lines using the Import Tool completed in Step #6b and the .CSV Import Worksheet completed in Step #5.

**NOTE:** Be sure to select the **Skip First Line** option.

**NOTE:** Best Practice is to run the Import in **Test Mode** first, verify results and then run live import.

**NOTE:** If importing many new lines, select 5 to 10 records to test the live import first (by copying column header line to a new import worksheet and then cutting the desired number of rows to live test and pasting them into the new import worksheet).

Upload Import File: BillingMatrix : CSV

Select File:

Import\_New CM Billing Matrix lines\_01012017.csv

Test Mode:  Skip First Line:

Verify the import was successful:

```

-----
Import process started at: 1/5/2017 10:41:15 AM
File Import_New CM Billing Matrix lines_01012017.csv received through HTTP upload. 816 bytes received.
Import started for table: BillingMatrix - format: CSV
File Processed: 6 entries were scanned.
File Processed: 6 entries were processed.
File Processed: 0 entries were invalid and not processed.
File Processed: 6 entries were for insert.
File Processed: 0 entries were for update.
File Processed: 0 entries were for delete.
Import process ended at: 1/5/2017 10:41:16 AM
-----

```

Verify the Billing Matrix lines are created successfully in Billing > Billing Config > Billing Matrix:

Matrix ID	Description	CPT4	Other Code	Modifier	External Code	Visit Type	Program	Location	Recipient	Start Minutes	End Minutes	Effective Date	Expiration Date	Group	Credential Group	Non Billable	Rate	Deaf Rate	Contract Rate	Fixed Units	First Unit Minutes	M
901	CM FACE TO FACE (Adult)	T2023		HE		CM F: F	TCM Clay A			1	254	1/1/2017				<input type="checkbox"/>	210.33	0.00		1.00		
902	CM FACE TO FACE (Adult)	T2023		HE		CM F: F	TCM Clay A			255	614	1/1/2017				<input type="checkbox"/>	210.33	0.00		1.00		
903	CM FACE TO FACE (Adult)	T2023		HE		CM F: F	TCM Clay A			615	44640	1/1/2017				<input type="checkbox"/>	210.33	0.00		1.00		
904	CM PHONE (Adult)	T2023		HE, U4		CM PHONE	TCM Clay A		AdtClient	1	1440	1/1/2017				<input type="checkbox"/>	210.33	0.00		1.00		
900	INTERPRETER SERVICE - Licensed	T1013				INTERPRETER SERVICE	TCM Clay A			8	1440	1/1/2017				<input type="checkbox"/>	35.25	0.00		1.00	22.50	1
905	MILEAGE	MILEAGE				MILEAGE-CONTRCT ONLY	TCM Clay A			0	1440	1/1/2017				<input type="checkbox"/>	0.56	0.00		1.00	1.50	1

## D. EXPIRE THE OLD BILLING MATRIX LINES BEING REPLACED:

- 8) Create a .csv (comma delimited) file Import Worksheet to expire the no longer valid rates.

**NOTE:** Only 2 columns are needed to expire the old records: **matrix\_id** & **end\_date**

Populate the worksheet with the Matrix IDs that need to be expired (i.e. – those replaced by the import completed in Step #7) and the desired Expiration Date (i.e. – usually one day prior to the Effective Date of the new records):

	A	B
1	matrix_id	end_date
2	201	12/31/2016
3	351	12/31/2016
4	352	12/31/2016
5	353	12/31/2016
6	354	12/31/2016
7	895	12/31/2016

### In Reports > Import Tool:

- 9) Create (or update an existing) BillingMatrix table 'Update' Import Tool (Billing Matrix Import - Update) by selecting only **matrix\_id** (order 1) & **end\_date** (order 2) from the Column options:

**NOTE:** For Billing Matrix 'updates', also select the **Use Internal ID** option:

Import Name:

Format:  Delimiter (CSV):  Parent XML Element:

Allow Invalid Fields:  Add/Delete Column:  Replace/Delete ALL:

Use External ID:  **Use Internal ID:**

Pre Query:

Post Query:

**Import Details: BillingMatrix - Billing Matrix Import - Update**

Column Order	Column	SQL Transform (%col%)
<input type="text" value="1"/>	matrix_id	<input type="text"/>
<input type="text" value="2"/>	end_date	<input type="text"/>

- 10) Import the Billing Matrix line updates (i.e. - expiration dates) using the Import Tool completed in Step #9 and the .CSV Import Worksheet completed in Step #8.

Verify the import was successful:

```

-----
Import process started at: 1/5/2017 11:16:53 AM
File BM Lines to Expire.csv received through HTTP upload. 116 bytes received.
Import started for table: BillingMatrix - format: CSV
File Processed: 6 entries were scanned.
File Processed: 6 entries were processed.
File Processed: 0 entries were invalid and not processed.
File Processed: 0 entries were for insert.
File Processed: 6 entries were for update.
File Processed: 0 entries were for delete.
Import process ended at: 1/5/2017 11:16:53 AM
-----

```

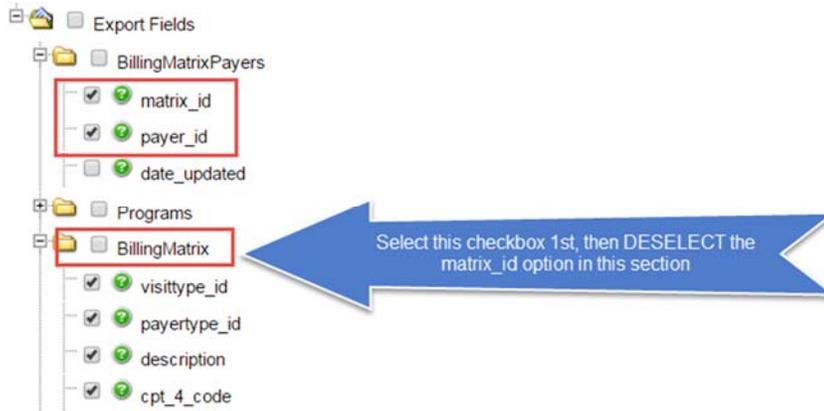
Verify the Billing Matrix lines are expired successfully in Billing > Billing Config > Billing Matrix.

## E. EXPORT ALLOWED PAYERS FROM EXPIRED BILLING MATRIX LINES:

In Reports > Export Tool:

11) Create an **Allowed Payers Export** using the **BillingMatrixPayers** table:

- a. Select **matrix\_id** and **payer\_id** under the BillingMatrixPayers section
- b. Select **ALL** BillingMatrix section options (by checking the 1st checkbox)
- c. But **DESELECT** **matrix\_id** in the BillingMatrix section



d. **Reorder** the **BillingMatrixPayers:matrix\_id** to Column Order 1 and **BillingMatrixPayers:payer\_id** to Column Order 2:

Export Details:

Column Order	Column Name	Ancestor ID	Export Name
1	BillingMatrixPayers:matrix_id		matrix_id
2	BillingMatrixPayers:payer_id		payer_id
3	BillingMatrix:visitype_id		visitype_id
4	BillingMatrix:payertype_id		payertype_id
5	BillingMatrix:description		description
6	BillingMatrix:cpt_4_code		cpt_4_code

e. Select **Finish**

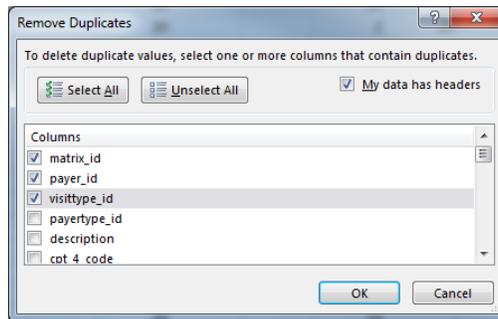
12) Run the 'Allowed Payers' Export to return all **Allowed Payer** information across all Billing Matrix lines in the domain.

**NOTE:** Export in **Delimited (CSV)** and check **Header Row** checkbox.

## F. PREPARE THE NEW BILLING MATRIX LINE ALLOWED PAYERS IMPORT DATA:

Within the .CSV file created in Step 12:

- 13) Prepare an import worksheet that will populate the appropriate **Allowed Payers** into the new Billing Matrix lines, by extracting this information from the now expired records.
  - a. In the .csv worksheet, go to the **DATA** tab, select **Remove Duplicates**, select the **Unselect All** button, then check only the **matrix\_id**, **payer\_id** and **visitype\_id** checkboxes and select **OK**.



- b. In the .csv worksheet, go to the **DATA** tab, select **Sort**, in 'Sort by' select **matrix\_id**, select **Add level** and in 'Then by' select **payer\_id**. Select **OK**.
  - c. In the .csv worksheet, go to the **DATA** tab, select **Filter**, so that the data can be filtered down to the desired Billing Matrix records.

**In this example:** We are filtering for all the expired (as of 12/31/2016) 'billable' Billing Matrix lines for Program ID '10', so we have filtered on the program\_id (10 only), non\_billable (0s only) and end\_date (= 12/31/2016) columns to return only the Allowed Payer records that need to be imported into the new Billing Matrix lines.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	
1	matrix	payer_id	visitype	payerty	descrip	cpt_4	other	modifi	modifi	program	recipie	creden	start_le	end_le	start_d	end_date	is_split	rate	contrac	unit_fi	first_ur	unit_m	
10087	201	2	15		INTERPRE T1013					10				8	1440	5/1/2016	12/31/2016	1	34.75		1	22.5	15
10088	201	114	15		INTERPRE T1013					10				8	1440	5/1/2016	12/31/2016	1	34.75		1	22.5	15
10089	201	224	15		INTERPRE T1013					10				8	1440	5/1/2016	12/31/2016	1	34.75		1	22.5	15
16213	351	2	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16214	351	17	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16215	351	34	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16216	351	47	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16217	351	54	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16218	351	66	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16219	351	79	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16220	351	82	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16221	351	99	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16222	351	114	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16223	351	197	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16224	351	244	37		CM FACE 1T2023		HE			10				1	254	5/1/2016	12/31/2016	0	203.88		1		
16225	352	2	37		CM FACE 1T2023		HE			10				255	614	5/1/2016	12/31/2016	0	203.88		1		
16226	352	17	37		CM FACE 1T2023		HE			10				255	614	5/1/2016	12/31/2016	0	203.88		1		
16227	352	34	37		CM FACE 1T2023		HE			10				255	614	5/1/2016	12/31/2016	0	203.88		1		
16228	352	54	37		CM FACE 1T2023		HE			10				255	614	5/1/2016	12/31/2016	0	203.88		1		

- d. In the .csv worksheet, copy the values from the first TWO columns (A & B) into a new .csv (comma delimited) worksheet. (This will become the **Allowed Payers Import worksheet** for your new Billing Matrix lines.)

**NOTE:** DO NOT copy these 2 columns by clicking on the Column *letter labels*. This will cause serious problems upon importing the file. Instead highlight **ONLY** the cells to be copied, including the Column table labels.

In Billing > Billing Config > Billing Matrix:

- 14) Filter for the newly created Billing Matrix lines that need **Allowed Payer** information:

<input type="checkbox"/>	<a href="#">edit</a>	900	INTERPRETER SERVICE - Licensed	T1013			INTERPRETER SERVICE	TCM Clay A			8	1440	1/1/2017
<input type="checkbox"/>	<a href="#">edit</a>	901	CM FACE TO FACE (Adult)	T2023	HE		CM F/F	TCM Clay A			1	254	1/1/2017
<input type="checkbox"/>	<a href="#">edit</a>	902	CM FACE TO FACE (Adult)	T2023	HE		CM F/F	TCM Clay A			255	614	1/1/2017
<input type="checkbox"/>	<a href="#">edit</a>	903	CM FACE TO FACE (Adult)	T2023	HE		CM F/F	TCM Clay A			615	44640	1/1/2017
<input type="checkbox"/>	<a href="#">edit</a>	904	CM PHONE (Adult)	T2023	HE,U4		CM PHONE	TCM Clay A	AdtClient		1	1440	1/1/2017
<input type="checkbox"/>	<a href="#">edit</a>	905	MILEAGE	MILEAGE			MILEAGE-CONTRCT ONLY	TCM Clay A			0	1440	1/1/2017

Within the .CSV file created in Step 13d: (Not going to lie... this is a tedious step...)

- Replace the Expired Billing Matrix IDs (in matrix\_id column) with the NEW Billing Matrix ID for each row in the **Allowed Payers** import worksheet:

Old matrix\_ids:

	A	B	C	D	E	F	G
1	matrix_id	payer_id					
2	201	2					
3	201	114					
4	201	224					
5	351	2					
6	351	17					
7	351	34					
8	351	47					
9	351						
10	351						
11	351	79					
12	351	82					
13	351	99					
14	351	114					
15	351	197					
16	351	244					
17	352	2					
18	352	17					
19	352	34					

New matrix\_ids:

	A	B
1	matrix_id	payer_id
2	900	2
3	900	114
4	900	224
5	901	2
6	901	17
7	901	34
8	901	47
9	901	54
10	901	66
11	901	79
12	901	82
13	901	99
14	901	114
15	901	197
16	901	244
17	902	2
18	902	17
19	902	34



**HINT:** Utilize the originally exported and filtered data (from Step #13c), along with the filtered Billing > Billing Config > Billing Matrix records in Credible, to help determine which new Matrix IDs replace the old.

## G. IMPORT ALLOWED PAYERS INTO THE NEW BILLING MATRIX LINES:

In Reports > Import Tool:

- 16) Create (or use an existing) **BillingMatrixPayers** table (Allowed Payers) Import Tool (Billing Matrix Import - Update) by selecting only **matrix\_id** (order 1) & **payer\_id** (order 2) from the Column options to match your new **Allowed Payers** import worksheet columns:

**Import Builder: BillingMatrixPayers**

---

Import Name:

Format:  Delimiter (CSV):  Parent XML Element:

Allow Invalid Fields:  Add/Delete Column:  Replace/Delete ALL:

Use External ID:  Use Internal ID:

Pre Query:

Post Query:

---

Select all columns that will be in the import file:

matrix\_id  date\_updated

payer\_id

- 17) Import the new Billing Matrix line Allowed Payers using the Import Tool completed in Step #16 and the .CSV Import Worksheet completed in Step #15.

Verify the import was successful:

```

-----
Import process started at: 1/5/2017 4:17:58 PM
File Import_New CM Allowed Payers_01012017.csv received through HTTP upload. 449 bytes received.
Import started for table: BillingMatrixPayers - format: CSV
File Processed: 52 entries were scanned.
File Processed: 52 entries were processed.
File Processed: 0 entries were invalid and not processed.
File Processed: 52 entries were for insert.
File Processed: 0 entries were for update.
File Processed: 0 entries were for delete.
Import process ended at: 1/5/2017 4:18:00 PM
-----
    
```

Verify the Billing Matrix lines Allowed Payers are imported successfully in Billing > Billing Config > Billing Matrix > Export