



# CDT Billing Report

## AWARDS INSTRUCTION SHEET

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The AWARDS Fiscal/Program module provides user with access to the Continuing Day Treatment (CDT) Billing Report, which provides direct services contact data for monthly billing needs.

CDT Billing Reports run prior to April 1, 2009 will be different than CDT Billing Reports run after April 1, 2009 to incorporate The New York State Office of Mental Health's Continuing Day Treatment (CDT) regulatory changes effective as of April 1, 2009.

*If you do not see the CDT Billing Report on your Fiscal/Program menu, please contact your Client Services representative for assistance.*

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### ABOUT THIS DOCUMENT

This document is intended to explain how the CDT Billing Report works in AWARDS. Specific topics are:

- [CDT Billing Report Rules](#) – Learn about the CDT Billing Report rules. Page **1**
  - [Running the CDT Billing Report](#) – Learn how to run and interpret the report. Page **2**
  - [CDT Invoices](#) – Learn about CDT invoices in AWARDS. Page **3**
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### CDT BILLING REPORT RULES

The CDT Billing Report is intended to provide direct services contact data for monthly billing needs. This includes face-to-face progress notes, group notes, group activities attendance records, reception desk hours and contacts logs that have no progress note attached to them. For each client on the program census, this report shows the daily billable hours. When the report is run from the first of the month, a running monthly total is also available.

The following billing rules apply to the CDT Billing Report in AWARDS:

*Note that different billing rules exist when reports are run for date periods that precede 4/1/09, and those run with date ranges from 4/1/09 forward.*

- Prior to April 1, 2009 the report allowed the user to set the maximum countable duration for the day, with a default of five hours.

As of April 1<sup>st</sup> 2009, the default is four hours.

- Prior to April 1, 2009, the report displayed the actual number of billable hours for each day (0, 1, 2, 3, 4, or 5).

As of April 1<sup>st</sup> 2009, the daily hours display 0, 2, or 4, where anything less than 2 is 0, anything less than 4 but more than 2 is 2, and anything more than 4 is 4.

*4 hours, which is a full day for billing purposes, is only displayed if there are at least 3 face-to-face services each at least 15 minutes in duration (including progress notes, contacts logs, group notes, or group activity attendance) and a total of at least 4 attendance hours.*

2 hours, which is a half day for billing purposes, is only displayed if there is at least 1 face-to-face service of at least 15 minutes in duration (including progress notes, contacts logs, group notes, or group activity attendance) and a total of at least 2 attendance hours.

0 is displayed if no face-to-face services of at least 15 minutes in duration are found, even if attendance hours exist.

- As of April 1<sup>st</sup> 2009, a full day visit may be billed, rather than a pre-admission visit, when the service date is prior to the program admission date and the client has at least four hours of attendance and three services. If these conditions are not met, it is considered a pre-admission visit and appears as such on the report. Therefore, the report displays 4 hours if the client has 4 hours and 3 services rather than putting the X in the pre-admission column. Otherwise, if the client has at least one 1-hour pre-admission visit, it displays the X in the pre-admission column.
- As of April 1<sup>st</sup> 2009, the program attendance duration for the CDT Billing Report does not just look at the reception desk time. First it looks at the services duration and adds the time for all the progress notes, contacts logs, group activities and group notes. Then if the "Include Hours based on Reception Desk" check box is checked on the *CDT Billing Report Menu* page, it looks at the reception desk time.
- As of April 1<sup>st</sup> 2009, any attendance time tracked via group activities with the activity type "Community Meal" and/or "Non-Medically Necessary Service" is subtracted from the total attendance time recorded under Reception Desk, and so is not included in the billable hours on this report.
- As of April 1<sup>st</sup> 2009, any time duration tracked for services recorded in Crisis notes or Collateral notes does not count towards the duration and services needed for half and full day billing.
- As of March 15<sup>th</sup> 2010, agencies have the ability to specify a **default meal period**. When set, the default meal period will also be subtracted from the program attendance duration, unless the client is recorded in a Community Meal during any of the default meal period time slot or is not active in any billable service. If the client is active in billable services for part of the default meal period, then AWARDS will only subtract the remainder of the default meal period from the program attendance duration.

*To set the default meal period, please contact your Client Services representative or the Help Desk.*

- For reports run with dates after April 1<sup>st</sup> 2009, AWARDS calculates billable program time duration by adding reception desk hours, *subtracting* any full or half day non-billable and separately billable hours from the reception desk hours and *adding* billable service time not included in the reception desk hours.

*Full or half day non billable hours include "Community Meal," "Non-Medically Necessary Service" entries, and any set default meal period. Separately billable hours include crisis notes and collateral notes.*

*The CDT Billing Report also contains columns for pre-admission, collateral and crisis visits. The crisis and collateral visits are determined by looking for crisis notes and collateral notes.*

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## RUNNING THE CDT BILLING REPORT

AWARDS is configured to allow users to run the CDT Billing Report for certain programs and date ranges. To do so, complete the following steps:

1. From the AWARDS *Opening Menu* page, click **Fiscal/Program**. The *Fiscal/Program Reports Menu* page is displayed.

- Click **CDT Billing Report**. The *CDT Billing Report Menu* page is displayed. →
- Click the **Program** drop-down arrow and select the CDT program or program group for which the report is to be run.

- The date range specified in the **Start Date** and **End Date** fields defaults to the beginning of the current month to today's date. This date range can be edited or left with its default values.
- The value in the **Max Hours/Day** field defaults to four hours, which is the maximum countable duration for the day. This field can be left with its default value.
- If reception desk time is to be counted in the billing report, ensure the **Include Hours based on Reception Desk** check box is checked. It is checked by default.
- To run the report without individual client details, click the **Summary Only** check box. Otherwise, to see a report that contains individual client details, leave this unchecked.
- Click **CONTINUE**. The CDT Billing Report is displayed.

For reports with a start date prior to April 1, 2009 the report displays a section for each client in the selected program(s), and lists the number of billable hours a client has for each day within the report date range. A running total for the date range is also included. An X may appear in the "Pre-Admission," "Collateral" and "Crisis" columns of the report depending on the type of visit/services counted for that day, as previously explained in this document.

For reports with a start date of April 1, 2009 or later the report displays a section for each client in the selected program(s), and contains columns for "Half Day" and "Full Day" bills. The columns display an X in each column when 2 or 4 hours (respectively) are eligible to be billed on each day of the report. The report also displays columns for "Number of Billable Services," and "Billable Program Time," which contain the total number of billable services and the number of billable hours for each day of the report date range determined using the rules previously explained. An X may appear in the "Pre-Admission," "Collateral" and "Crisis" columns of the report depending on the type of visit/services counted for that day, as previously explained in this document.

A subtotal row appears at the bottom of each client section, containing the sum of all the fields in each column of the report. Note that the subtotal reported for the "Half Day" and "Full Day" columns does not reflect the total number of billable hours, but the count of each type of bill. The "Running Total" column displays the total billable hours in this case.

A TOTAL row appears at the bottom of the report and displays the sum of all fields in each column.

The process of running the CDT Billing Report is now complete.

## CDT INVOICES

For agencies that are configured to use the Billing Menu feature in the Fiscal/Program module, the option to generate invoices for CDT programs assumes the following assumptions:

- The provider is doing monthly billing

- Billing is based on reception desk attendance
- A three-tiered hourly rate is used
- The rate is based on whole hours with a maximum of five hours per day
- The tiered rate steps down based on the aggregate attendance hours in the month

Per the CDT regulatory changes effective April 1<sup>st</sup> 2009, the following modifications were deployed to the CDT billing functionality in AWARDS as of that date:

- The daily hours are two or four (half day or full day, respectively) as described earlier in this document for the CDT Billing Report, where a half day requires at least one service and a full day requires at least three services.
- The billing rates data entry include options to set rates for:

CDT half day	CDT full day	Collateral visit	Crisis visit
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*The announced rates do not permit you to continue to set hourly rates such that they will multiply out correctly to the penny for two and four hours. Rather these new rate options must be entered in order to generate invoices after April 1<sup>st</sup>, 2009.*

- The rate tiers are applied at 40 and 65 hours, instead of 50 and 80 hours for the monthly aggregate attendance hours.
- In addition to the half day and full day regular visits, invoices are created for crisis and collateral visits based on the individual progress notes. Specifically:
  - If a face-to-face progress note (15+ minutes in duration) is found that is flagged as a crisis note, and there is a billing rate record for a crisis visit, an additional invoice for the day is created.
  - If a face-to-face collateral contact note (30+ minutes in duration) is found and there is a billing rate record for a collateral visit, an additional invoice for the day is created.

*Note that if a CDT billing batch is generated for a date period that precedes 4/1/09, the old logic will be in place. The new logic put in place for the regulatory changes only applies to batches run with date ranges from 4/1/09 forward.*