

The IMA Desktop Implementation Guide Fee Schedules

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Fee Schedules

Introduction

A fee schedule is a list of the rates that the agency charges for the services provided. Most agencies have more than one fee schedule as there is more than one expected fee for each service.

Agency Standard – a single table of standard rates for each service

Self pay – the out of pocket expense for the client, each self pay fee schedule can have up to seven levels of fees which can account for sliding fee scales or different copay amounts. Should more than seven levels be needed, more self pay fee schedules, with additional levels may be created.

Insurance – the expected fee to be paid by insurance plans. There may be separate fee schedules for every insurance company, and even multiple schedules that take into account different copay amounts.

Medicare – the reimbursement rates as regulated by Medicare. Medicare adjusts fees depending on the physical location of the services, service provider and new rates that come into effect with revised reimbursement levels.

Medicaid – the rates for Medicaid also periodically change, so IMA tracks beginning and ending dates for each fee.

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The Set Up process

The Agency Standard Fee Schedule is the first schedule entered in the IMA Desktop. Begin with a list of services provided and the agency standard fee for each one. Then move on to create the self pay and insurance plan fee schedules, input unique names and two-character code abbreviations for each one. Finally, the Medicaid and Medicare fee schedules and their effective dates are indicated.

Fee schedule grids

Each client is associated with an appropriate fee schedule that IMA uses to look up the correct fee for each service. With a single fee schedule, 'Agency Standard', in place, the system will function. IMA Desktop allows the creation of as many fee schedules as are needed.

In the Agency Profile chapter of this Implementation Guide, the services provided by the agency were identified and assigned a code. These Activity Codes are the key to the fee schedules.

- Multiple fee schedules can be attached to a single Activity Code.
- IMA will allow 'code switching' to substitute a Managed Care code for a simpler Activity Code.
- IMA can substitute the proper ICD-9 procedure code for the Activity Code where needed.

Setting up fee schedules is a process of associating billable activity codes with specific fees for each set of payment sources.

The Fee Schedule Table

Before using a fee schedule, it must be defined in the fee schedule table with a **code and description**. The **Self-pay** and **Insurance** fee schedules must be set up. The schedules for **Agency Standard**, **Medicaid**, and **Medicare** already exist in the IMA Desktop.

| [-] System Administration,
| [-] Table Maintenance,
| working with the fee schedule table ('FEESCH').

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The Fee Schedule Details

After a fee schedule is defined, it must be filled in with **details**: every billable activity code has to have an associated fee (or up to seven fees in the case of self pay fee levels).

| [-] System Administration,
| [-] Billing,
| [-] Fee Schedules,

select the appropriate screen for the type of fee schedule (**Agency Standard, Self pay, Insurance, Medicare, Medicaid**).

Subsequent sections of this manual provide instruction on how to work with the 'grid' (fee table spreadsheet) for each kind of fee category, and give tips on how to use the IMA Desktop's time saving tools to enter the agency fee schedules.

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The Fee Schedule Table

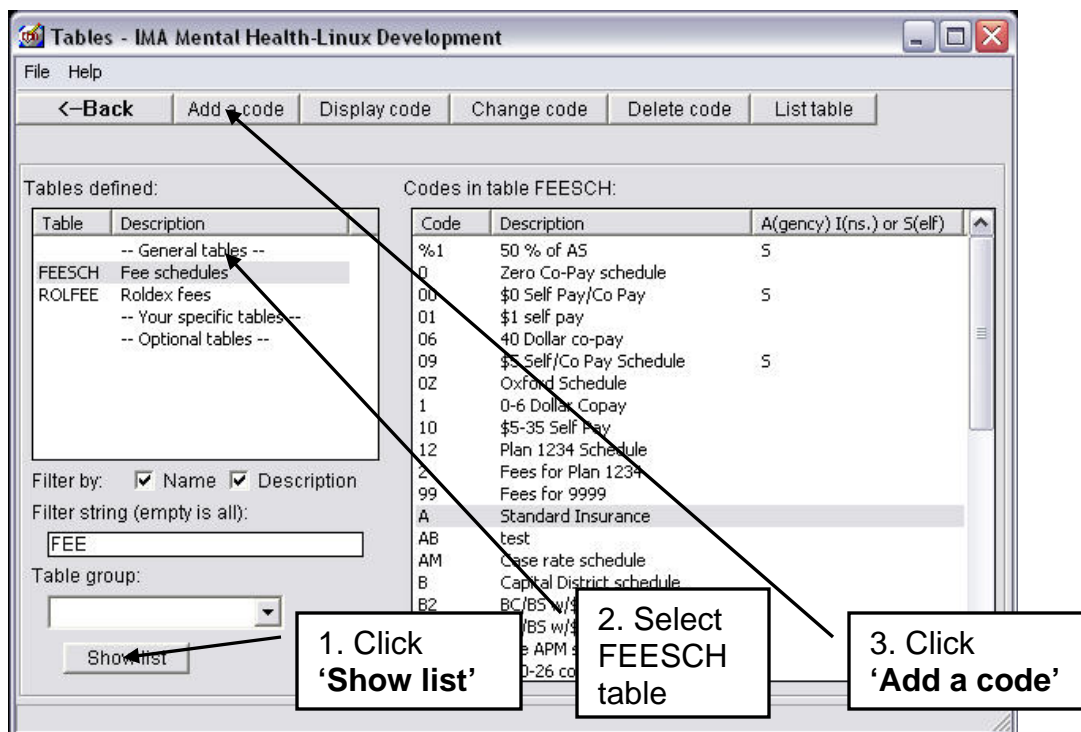
Fee schedules must be defined in the fee schedule table with a **code and description** before the schedule itself is filled out. The agency is responsible for creating its own new codes and descriptions for the **self-pay** and **insurance** fee schedules. Codes for **Agency Standard**, **Medicaid**, and **Medicare** are already set up by the IMA Desktop. For these payment sources, proceed directly to filling in the fee schedule details.

To create a fee schedule, start Table Maintenance.

[-] System Administration

->System Tables

->Table Maintenance



Click **'Show list'** to see all the table names, or enter a filter string such as 'FEES' before you click **'Show list'**.

Highlight the table 'FEESCH – Fee schedules'.

All the fee schedule codes will now appear in the right window pane.

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Click '**Add a code**' to create a new fee schedule definition.

Adding a new code to table FEESCH

<-Back Add

Schedule:

Description:

A(gency) I(ns.) or S(elf):

Memo:

Add an entry to the FEESCH table. The code and description are the only required fields necessary to establish a fee schedule.

Schedule: a two-character code abbreviation for this schedule

Description: a name to describe this schedule clearly

A(gency) I(ns.) or S(elf): (optional) enter **A**, **I**, or **S** for the category of schedule: **Agency Standard**, **Insurance**, or **Self-pay**

Memo: (optional) information for reference

Click **Add**, then **Back** to return to the IMA Desktop menu.

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Filling in the Details

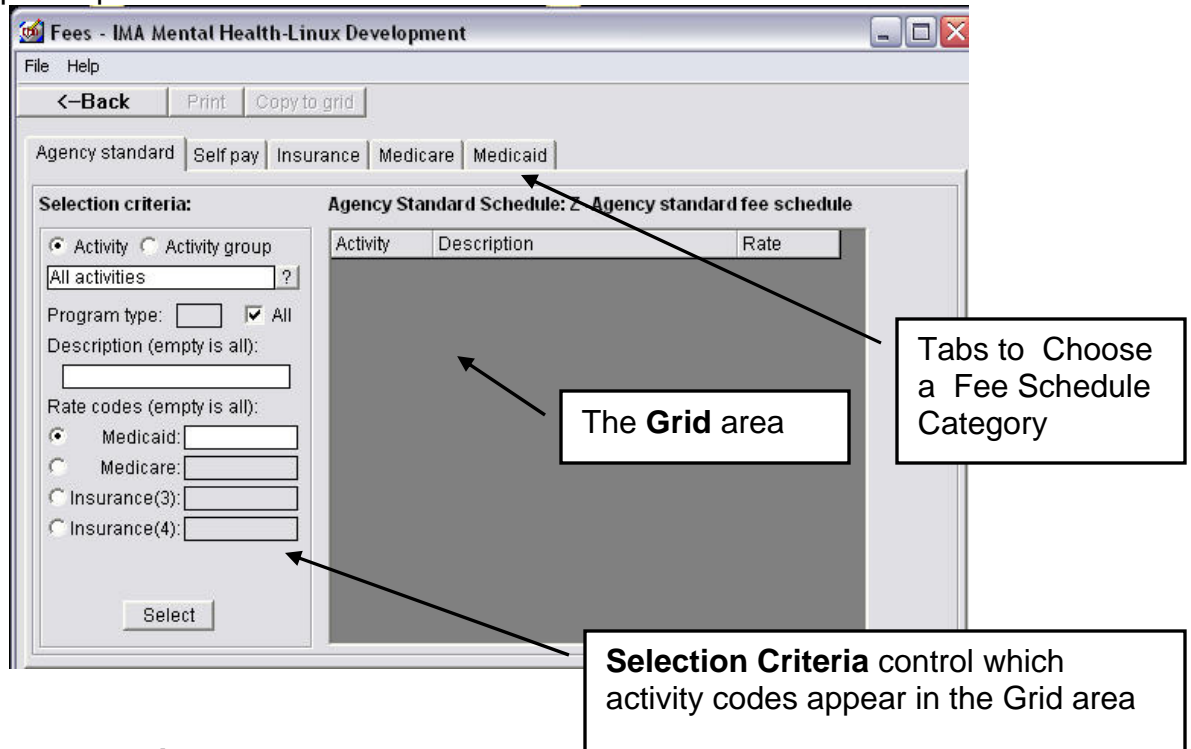
After a fee schedule is defined in the Fee Schedule Table, work with it to fill in all the billable activity codes and their associated fees.

[-] System Administration

->Billing

->Fee Schedules

This opens up the Fees window:



How the Fees Window works

To create or modify a fee schedule, enter the correct fees for each of the billable activity codes. The work area where these fees are entered is called the Grid. In the Grid, all of the activity codes can be displayed, using the Selection Criteria. To populate the Grid with a table of every activity code, just leave the selection criteria blank, and press **Select**. A spreadsheet where all fees for service can be entered in the proper spaces appears.

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Filling in fees for every activity code on every fee schedule can be done with **shortcuts**:

Shortcut: Using Grid Selection Criteria

Instead of entering fees for each code, use Selection Criteria to filter and display a set of codes in the Grid. Fill in the fee for a single code, highlight that code, and click the '**Copy to Grid**' command. The fee will be duplicated to all the other codes in the Grid.

Shortcut: Copying fee schedules

Duplicate an entire fee schedule with the '**Copy**' command, make selected changes where necessary.

Fee categories are indicated by the Tabs:

Agency standard

Self pay

Insurance

Medicare

Medicaid

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Agency Standard

The Agency Standard fee schedule (usually predefined with the code 'Z' or 'ZZ') is a single list of every billable activity code, with a description and fee amount.

Columns in the Agency Standard fee schedule window:

Activity – the Activity Code (not editable here)

Description - as defined in the Activity Code definition (not editable here)

Rate – the fee amount (editable – click the box to fill in the fee)

The **Agency Standard** tab

The Selection Criteria determine which activities appear in the Grid:

Choose **Activity** or **Activity group** or, leave alone to show all activities

Select a single activity or a group if desired

Select a program type or, leave 'all' checked to show all activities

Select a description – or, leave empty to view all activities

Press '**Select**' to populate the Grid.

The screenshot shows a window titled "Fees - IMA Mental Health-Linux Development". It has a menu bar with "File" and "Help". Below the menu bar are buttons for "<-Back", "Print", and "Copy to grid". There are tabs for "Agency standard", "Self pay", "Insurance", "Medicare", and "Medicaid". The "Agency standard" tab is selected.

Under "Selection criteria:", there are radio buttons for "Activity" (selected) and "Activity group". Below that is a dropdown menu showing "All activities". There are also fields for "Program type:", "Description (empty is all):", and "Rate codes (empty is all):". Under "Rate codes", there are radio buttons for "Medicaid:", "Medicare:", "Insurance(3):", and "Insurance(4):". A "Select" button is at the bottom left.

The "Agency Standard Schedule: Z - Agency standard fee schedule" table is shown with the following data:

Activity ^	Description	Rate
000	Intake/Initial Eval	250.00
001	Regular Clinical Visit - 1 Hr	110.00
002	Group Service - 1 hour	75.00
003	Clinical visit > 30 Minutes	250.00
004	Outpatient CD 1	60.00
005	Outpatient CD 2	60.00
006	Incident - Attempted Homicide	110.00
01	Brief Visit	90.00
012	Psychiatric Eval: Pre-Admit	125.00
013	Psychological Test: Clinic Pt.	100.00
015	Crisis Visit	100.00
016	Client Home Visit	100.00
018	Case Management - BRIEF	75.00
019	Off-Site Client Visit	75.00

A callout box with a black border and white background points to the "Rate" column of the table. The text inside the box is "Enter a fee for each Activity in the Rate column".

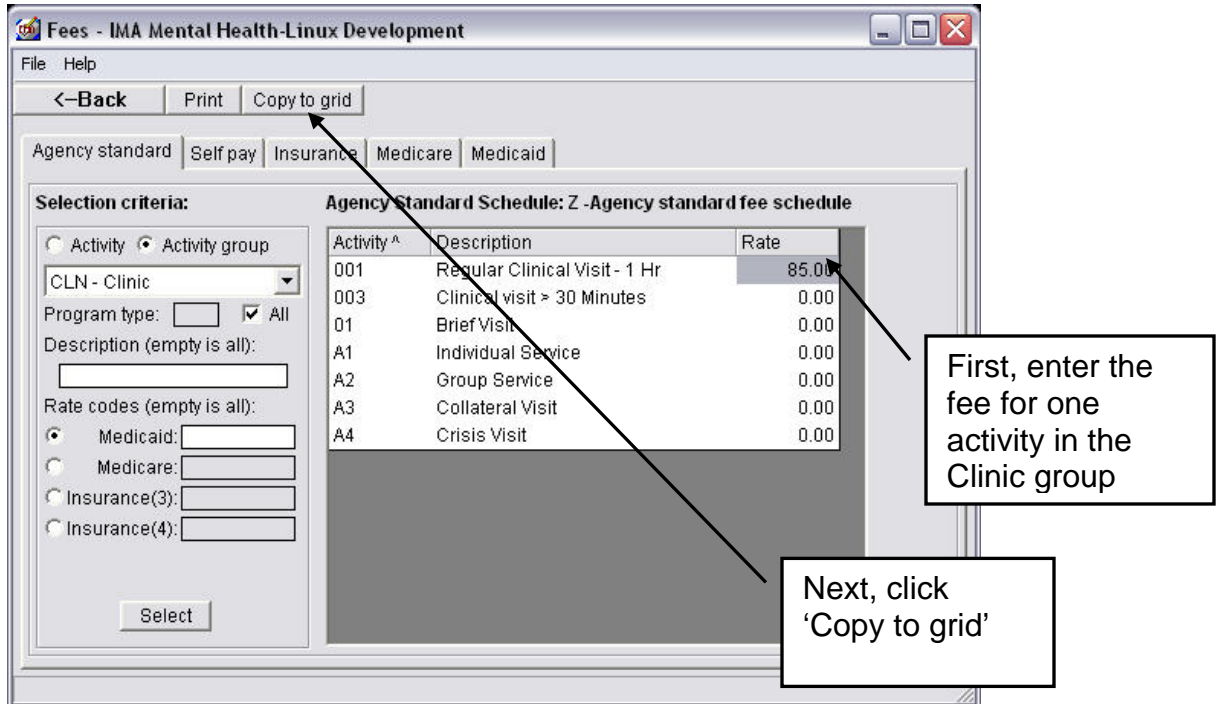
Copying fees from one activity to many

A time-saving alternative exists in the **Copy to grid** option. For example, if all 'Clinic' activities have a fee of \$85.00, select similar activities and then use the '**copy to grid**' button to enter the same \$85.00 fee.

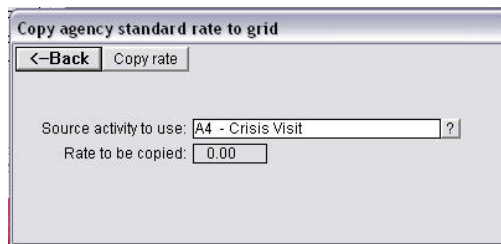
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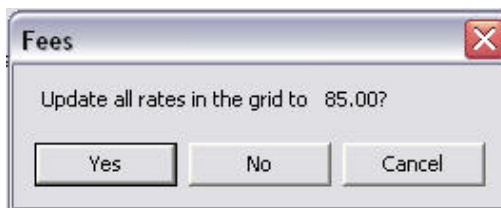
First, click the **Activity Group** button, choose a group type, and click **'Select'**. The grid fills in with the selected activities. In this example, chose CLN – Clinic activities:



Fill in the fee for the first activity – in this case, \$85.00. Then click **'Copy to grid'**.



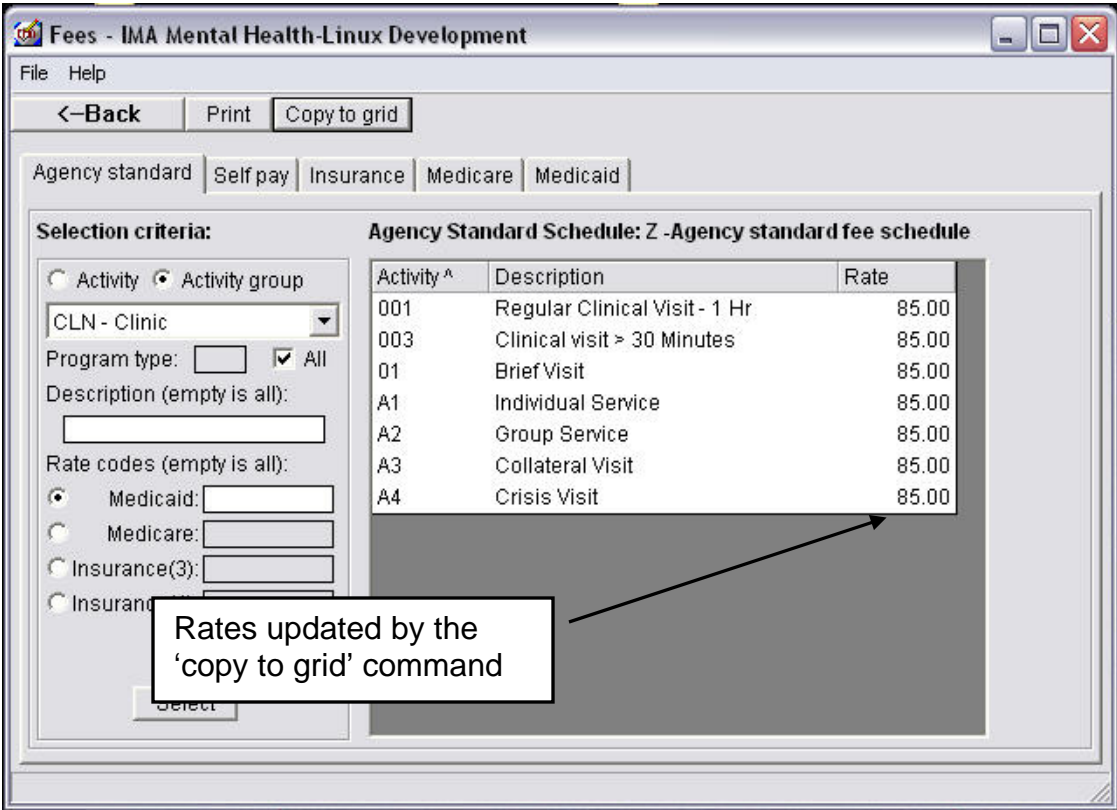
Click **'Copy rate'**. A confirmation window appears: Click **'Yes'** to proceed:



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All CLN rates will be the same \$85.00:



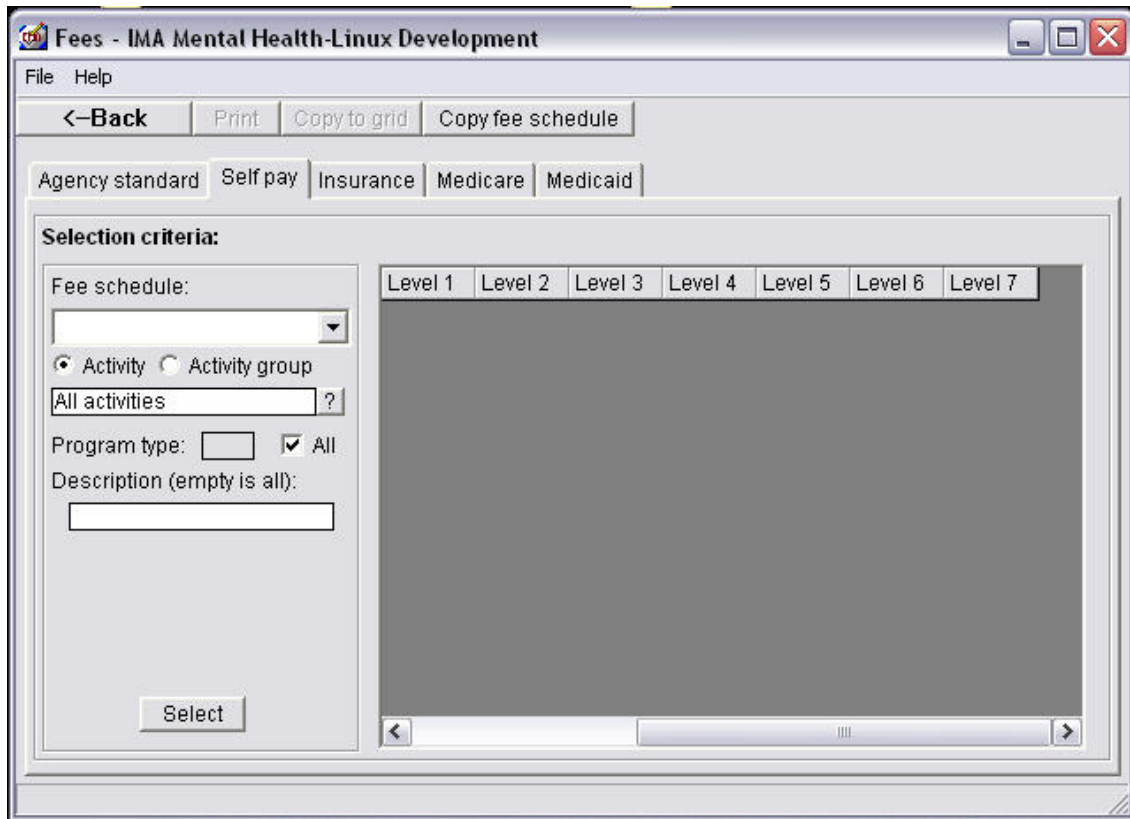
Use the Selection Criteria to work with similar activities, fill in fees and copy them.

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Self Pay

Click the **Self Pay** tab to view the window for this category of fee schedules.



Columns in the Self Pay fee schedule:

Activity – the Activity Code (not editable here)

Description – descriptive text (not editable here)

Level 1 – enter the fee here if there is a single fee

Level 2 – enter fees here for sliding fee scales or copay amounts

Level 3 - “ “ “ “

Level 4 - “ “ “ “

Level 5 - “ “ “ “

Level 6 - “ “ “ “

Level 7 - “ “ “ “

It is not necessary to fill in all seven levels in the Self Pay fee schedules.

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Select a **fee schedule** from the drop-down list of defined codes. In the previous section, at least one self pay fee schedule in the Fee Schedule Table should have been defined. Codes identified as '**S**' (self pay) will appear in this drop-down list.

Enter Selection Criteria to populate the Grid window or leave blank to display all codes.

Choose an **activity code** or an **activity group** (or leave blank for all).

Choose a program type (or leave '**all**' checked).

Enter all or part of the description.

Click '**Select**'.

The **Grid** will appear with all or a subset of the activity codes selected.

In the following illustration, the Zero Co-pay fee schedule is selected, and, the CLN Activity Group is indicated as a subset, similarly to the Agency Standard example:

The screenshot shows the 'Fees - IMA Mental Health-Linux Development' application window. The 'Selection criteria' section on the left includes a 'Fee schedule' dropdown set to '0 - Zero Co-Pay schedule', radio buttons for 'Activity' (selected) and 'Activity group', a text box containing 'All activities', a 'Program type' section with 'All' checked, and a 'Description (empty is all):' text box. The 'Self-pay Schedule: 0 - Zero Co-Pay schedule' grid on the right has the following data:

Activity ^	Description	Self-pay	Level 1	Level 2	Level
000	Intake/Initial Eval	Self-pay	80.00	0.00	0
		Sweep	0.00	0.00	0
001	Regular Clinical Visit -	Self-pay	0.00	0.00	0
		Sweep	0.00	0.00	0
002	Group Service - 1 hour	Self-pay	0.00	0.00	0
		Sweep	0.00	0.00	0
003	Clinical visit > 30 Minut	Self-pay	0.00	0.00	0
		Sweep	0.00	0.00	0
004	Outpatient CD 1	Self-pay	0.00	0.00	0
		Sweep	0.00	0.00	0
005	Outpatient CD 2	Self-pay			
		Sweep			
006	Incident - Attempted Ho	Self-pay			

A callout box with a black border and white background points to the 'Self-pay' column of activity 001. The text inside the box reads: 'Fill in the Self Pay fee in the Level 1 column; or use the remaining columns, up to seven levels for each activity'.

Sweep

Fill in the Self Pay amount (or copay), then use Sweep for the balance to be billed to the client after insurance has made partial payment for the service.

Leave the **Sweep** amount set at zero when the amount paid by the insurance company is accepted as payment in full.

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Using the Self Pay Fee Schedules

The IMA implementation specialist may suggest different strategies for using the Self Pay fee schedules. One possibility includes using the levels for fee ranges or to create multiple Self Pay fee schedules for each fee range, and within each schedule, use the levels to increase the fee by \$1:

For example, Schedule 21-27 could have the fees \$21, \$22, \$23, \$24, \$25, \$26, and \$27. Schedule 28-35 has the seven fee levels \$28, \$29, \$30, \$31, \$32, \$33, and \$34, and so on.

Shortcut: the Cop-y to Grid command

To save time, use Selection Criteria to populate the Grid, and the **'Copy to grid'** command to copy fees to activities that have the same fees.

The **'Copy to grid'** command works the same way as it did in the Agency Standard window, fees may be copied to all seven levels:

	Rate 1	Rate 2	Rate 3	Rate 4	Rate 5	Rate 6
Self-pay	80.00	0.00	0.00	0.00	0.00	0.00
Sweep	0.00	0.00	0.00	0.00	0.00	0.00

The confirmation dialog will appear:

Fees

Update all rates in the grid to the rates for 000?

Yes No Cancel

Click **'Yes'** to confirm.

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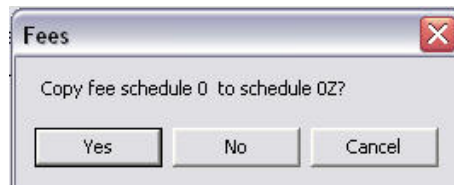
Copy Fee Schedule

Create a new Self Pay fee schedule by making a copy of an existing fee schedule, renaming and then modifying it.



The drop-down boxes are populated with codes from the Fee Schedule Table.

- Fill in the detailed fees for the first self-pay fee schedule
- Create a new fee schedule code in the Fee Schedule Table
- Click the '**Copy fee schedule**' button
- Select the first schedule as the 'Source schedule'
- Select the blank schedule's code as the 'Destination schedule'
- Click '**Copy rates**'.



Confirm the choice by clicking '**Yes**'.

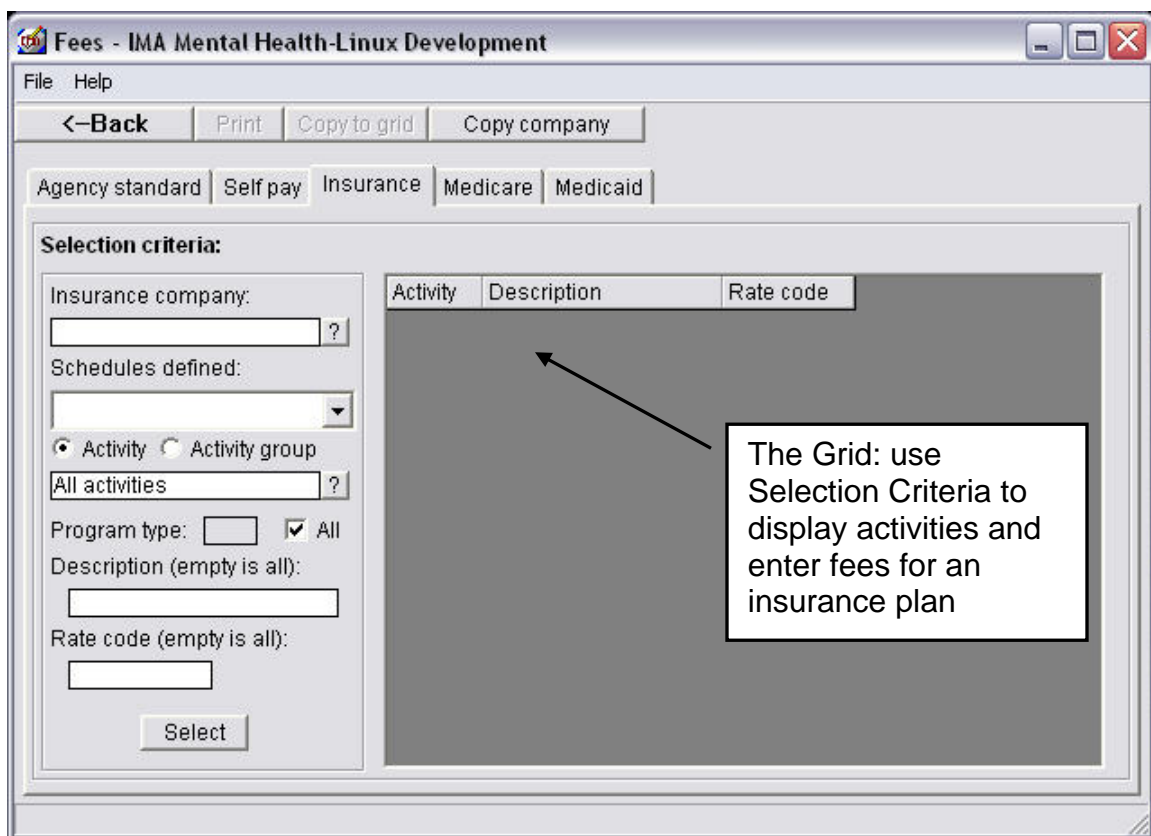
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Insurance

The Insurance tab opens a window that allows the maintenance of the insurance plan fee schedules. These plans are represented by the codes entered in the Fee Schedule Table.

Every insurance plan must have at least one fee schedule associated with it. The connection between the plan and its fee schedules is established when the plan is defined (see the previous chapter on insurance plans for instructions).



Standard Columns in the Insurance Fee Schedule:

- Activity** – the activity code (not editable here)
- Description** – descriptive text (not editable here)
- Rate code** – the CPT code for this activity (not editable here)
- Fee column 1** – enter fee for each billable service
- Fee column 7** – enter the fee if the plan is Managed Care

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Additional Columns that may appear:

If the insurance plan was defined using 'Staff Member Cross Reference':

Staff Title – multiple columns for each category of staff member, based on the Provider Table entered previously in Staff Definitions.

If the insurance plan was defined using 'All Staff'

Levels 1-7 – for each of the various disciplines that may deliver service

Filling in the Grid

As explained above in the discussion of Agency Standard and Self Pay fee schedules, the *Grid* is a spreadsheet that shows some or all of the fees for the plan fee schedule to be worked with. Select all, or some activities to display, then fill in the fee column of the grid for the activities that are displayed, and which activities are displayed by entering *Selection Criteria* and pressing the '**Select**' button.

Note: when an *Insurance company* is chosen from the drop-down window, the drop-down for *Schedules defined* shows only those fee schedules that are associated with that particular insurance plan.

The **Selection Criteria** for Insurance:

Choose an insurance company from the drop-down list (as previously defined – refer to the Insurance Plan chapter of this manual)

Select a fee schedule from the Fee Schedule Table (only insurance type fee schedule codes that apply to this plan will display).

Selection Criteria populate the Grid window:

Several optional filters are available:

Choose an *Activity code* or an *Activity group* (or leave blank for all).

Choose a program type (or leave 'all' checked).

Enter all or part of the *Description* (or leave blank).

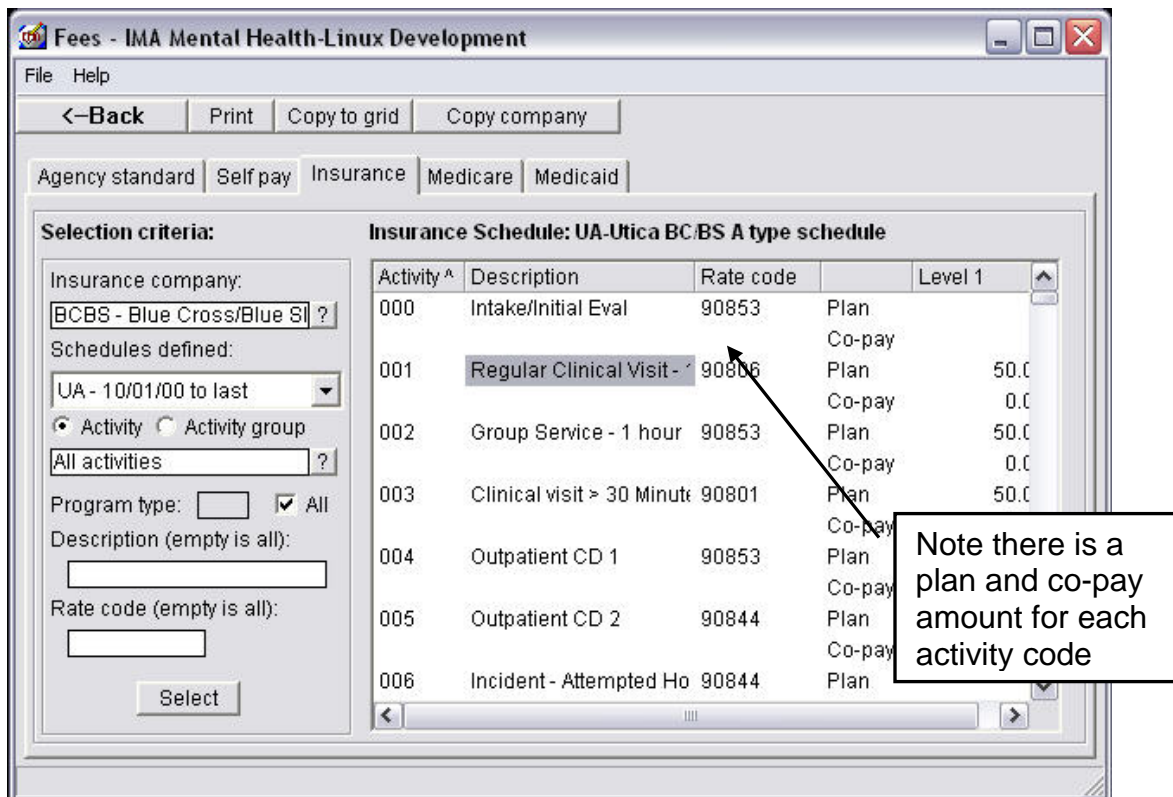
Enter a '*Rate code*' (CPT code) to select activities with the same CPT

Click '**Select**'.

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The **Grid** will fill in for the insurance plan that has been chosen:



As explained in the Insurance Plans chapter, there are two models for working with insurance, and therefore two strategies for filling in the details of the fee schedules for insurance:

The Single Plan method: the fee amount is the expected payment amount from the insurance company, and the copay amount (if any) is entered into each client's billing header. Leave the Co-pay fee blank in the insurance plan fee schedule

The Multiple Plan method: the fee amount from insurance is the expected payment less the Co-pay from the client. Fill in the client Co-pay fee in the insurance plan fee schedule, and create separate insurance plan schedules for each copay amount. Assign the client to the insurance plan fee schedule that conveys their copay amount.

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Time-saving hints

Again, two time-saving buttons are available to help create insurance fee schedules, and these work the same way as described in the previous section:

Copy to grid – use the selection criteria to populate the grid, enter a fee for one activity, highlight that activity, then use this command to duplicate the fee to all other activities in the grid

Copy company – fill in the fees for one company, then duplicate it to a second insurance company code, open the second company's schedule, and modify fees as needed.

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Medicare

The Medicare fee schedule has space for entry of the reimbursement rates for each activity by provider, and the dates that they go into effect. Note that the Selection criteria for Medicare includes '**Location**' as Medicare will have a different schedule of rates for separate geographic locations. There is only one Medicare fee schedule per location.

Activity	Description	Rate code	Effective	?	M.D.
----------	-------------	-----------	-----------	---	------

Columns in the Medicare fee schedule table:

Activity – the activity code (not editable here)

Description – text description (not editable here)

Rate code – the CPT code associated with the activity

Effective – date the rates went into effect

(note: click '?' to pull up the calendar and select dates quickly)

Medicare rates by specialty:

M.D. – enter rate for physician

Psychologist – enter rate for this specialty

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Social Worker – enter rate for this specialty
Nurse Practitioner – enter rate for this specialty
Clinical Nurse – enter rate for this specialty
Speech Therapist – enter rate for this specialty
Occupational Therapist – enter rate for this specialty
Physical Therapist – enter rate for this specialty

Not all columns apply to every activity.

Filling in the Grid

The Selection Criteria for the Medicare Grid:

Choose a location from the drop-down list. Medicare rates can be location-specific, and in the selection window a location must be specified even if the agency has only one.

Selection Criteria populate the Grid window:

Several filters are available:

Choose an activity code or an activity group (or none to show all).

Choose a program type (or leave 'all' checked).

Enter all or part of the description (or leave blank for all).

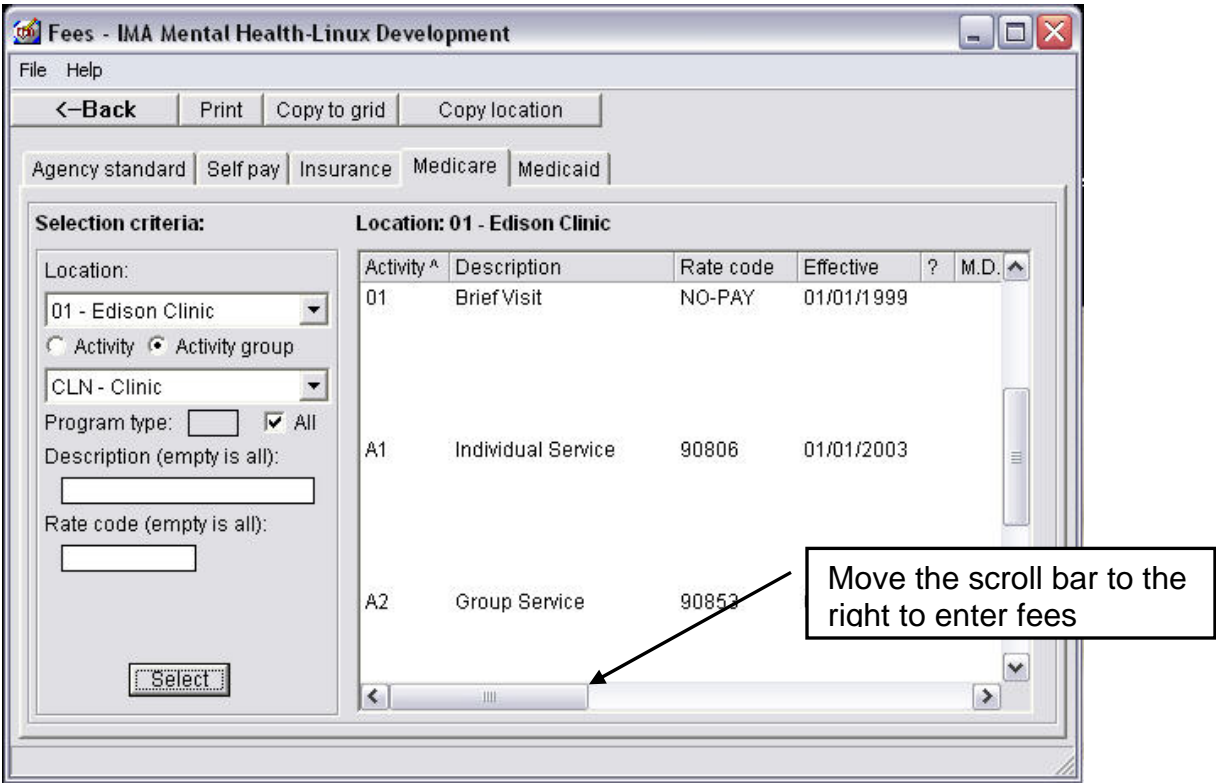
Enter a 'Rate code' (CPT code) to select activities with the same CPT

Click '**Select**'.

The Grid will fill in on the Medicare screen with the activities that have been chosen. In the following example, the filter is again set to the CLN activity group.

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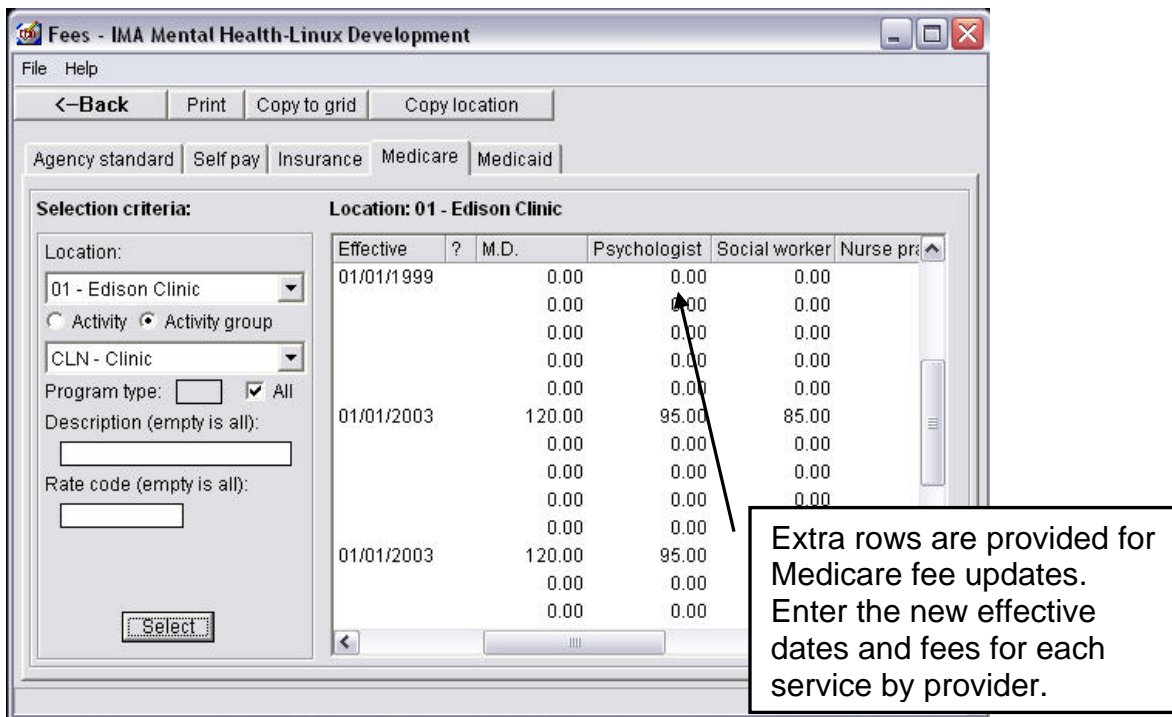
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When the scroll bar is moved to the right, the columns for the specialties will appear and allow for amount entry.

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The screenshot shows a software window titled "Fees - IMA Mental Health-Linux Development". It features a menu bar with "File" and "Help", and a toolbar with buttons for "<-Back", "Print", "Copy to grid", and "Copy location". Below the toolbar are tabs for "Agency standard", "Self pay", "Insurance", "Medicare", and "Medicaid". The "Medicare" tab is selected, and the window displays "Location: 01 - Edison Clinic".

On the left, there are "Selection criteria" fields: "Location:" (set to "01 - Edison Clinic"), "Activity" (radio button), "Activity group" (radio button, selected), "CLN - Clinic" (dropdown), "Program type:" (checkbox), "All" (checkbox, checked), "Description (empty is all):" (text input), and "Rate code (empty is all):" (text input). A "Select" button is at the bottom of this section.

The main area is a table with the following data:

Effective	?	M.D.	Psychologist	Social worker	Nurse pr:
01/01/1999		0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00
01/01/2003		120.00	95.00	85.00	0.00
		0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00
01/01/2003		120.00	95.00		
		0.00	0.00		
		0.00	0.00		

A callout box with a black border and white background points to the table with the text: "Extra rows are provided for Medicare fee updates. Enter the new effective dates and fees for each service by provider."

Tip: save time with the Copy buttons

Similar to the Insurance fee schedules, two time-saving buttons are available to help create the Medicare fee schedule.

Copy to grid – use the selection criteria to populate the grid, enter a fee for one activity, highlight that activity, then use this command to duplicate the fee to all other activities in the grid

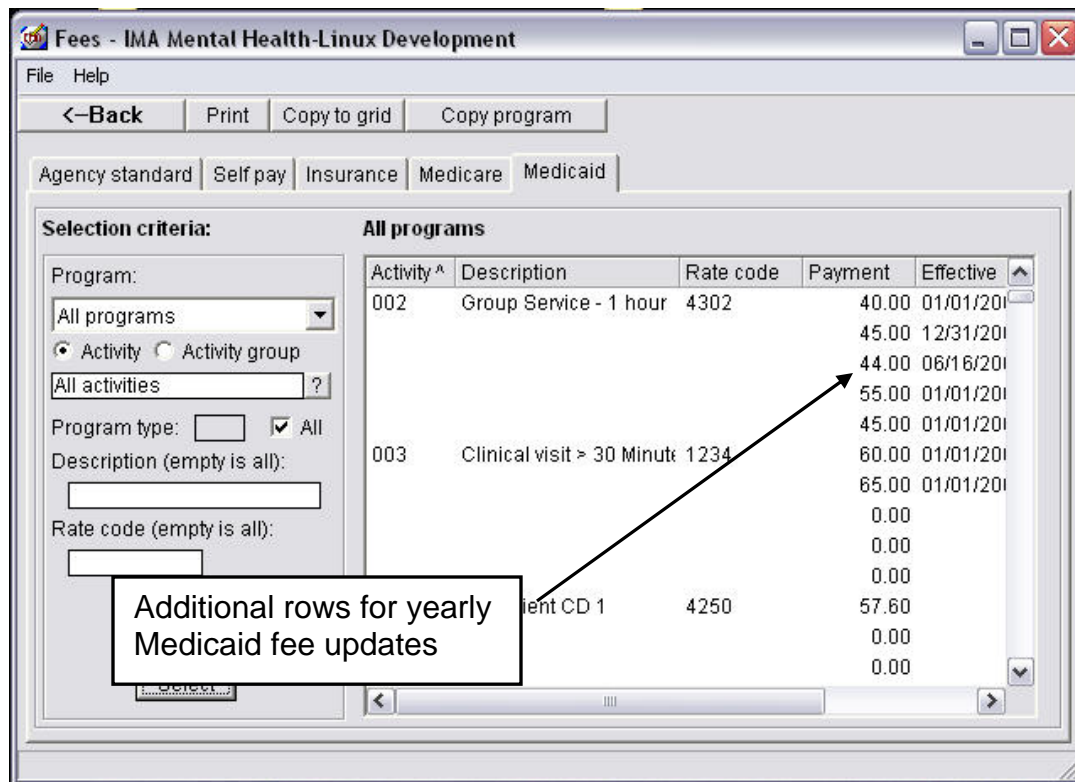
Copy location – fill in the fees for one location, then duplicate it to a second location code, open the second location's Medicare fee schedule, and modify fees as needed.

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Medicaid

Medicaid rates are not location-specific but can vary by program. Define a Medicaid rate schedule for each program, or leave the default, 'All programs' and define a single Medicaid fee schedule for the entire agency. Medicaid fees do not vary by provider, so there is only one rate column for each activity code:



Columns in the Medicaid fee schedule table:

Activity – the activity code (not editable here)

Description – text description (not editable here)

Rate code – the Medicaid Rate Code (not the CPT Code) associated with the activity

Payment – enter the rate Medicaid pays for this service

Effective – date the rates went into effect

(note: click '?' to pull up the calendar and select dates quickly)

Expires – leave blank until new Medicaid rates are published annually.

Fill in the expiration date in this row when new rates are published, and use the next row to enter the new effective data and fee information.

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Filling in the Grid

The Selection Criteria for Medicaid:

Choose a **Program** from the drop-down list because Medicaid rates are sometimes program-specific

Enter **Selection Criteria** to populate the Grid window (or leave blank to display all codes). Several filters are available:

Choose an activity code or an activity group.

Choose a program type (or leave 'all' checked).

Enter all or part of the description.

Enter a 'Rate code' (Medicaid rate code) to select activities with the same code.

Click '**Select**'.

The Grid will fill in for Medicaid with the activities that been have chosen. With Medicaid, the option of entering the effective starting and ending dates for each fee.

Shortcuts

Similarly to the Medicare fee schedules, two time-saving buttons are available to help you create the Medicaid fee schedule. These work the same way as described in the previous section, except you can duplicate by program rather than location:

Copy to grid – use the selection criteria to populate the grid, enter a fee for one activity, highlight that activity, then use this command to duplicate the fee to all other activities in the grid

Copy program – fill in the fees for one program, then duplicate it to a second program code, open the second location's Medicaid fee schedule, and modify fees as needed.