Vendor Information Portal (VIP) User Guide

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Overview

The Choices Vendor Information Portal (VIP) is an Internet based web application that allows vendors to submit invoices electronically with Choices. Using the Vendor Information Portal will help expedite payment of services performed as well as help facilitate accurate submission of billable services. The following instructions should prove to be helpful in learning how to use the different features of the Vendor Information Portal (VIP).

Accessing the Vendor Information Portal

You can access the Vendor Information Portal at these links:

- Indiana: https://services.choicesteam.org/login.aspx
- Mississippi: https://msvip.choicesccs.org/

In your web browser configuration, please be sure to enable "pop ups" for this website .

The Vendor Information Portal is also published on the Choices website here:
https://www.choicesccs.org/providers/claims

For best performance, use Microsoft Internet Explorer Version 7 or higher or Google Chrome.
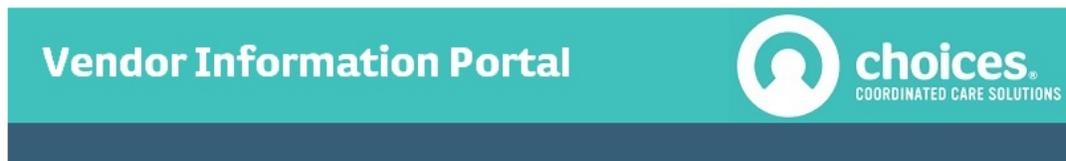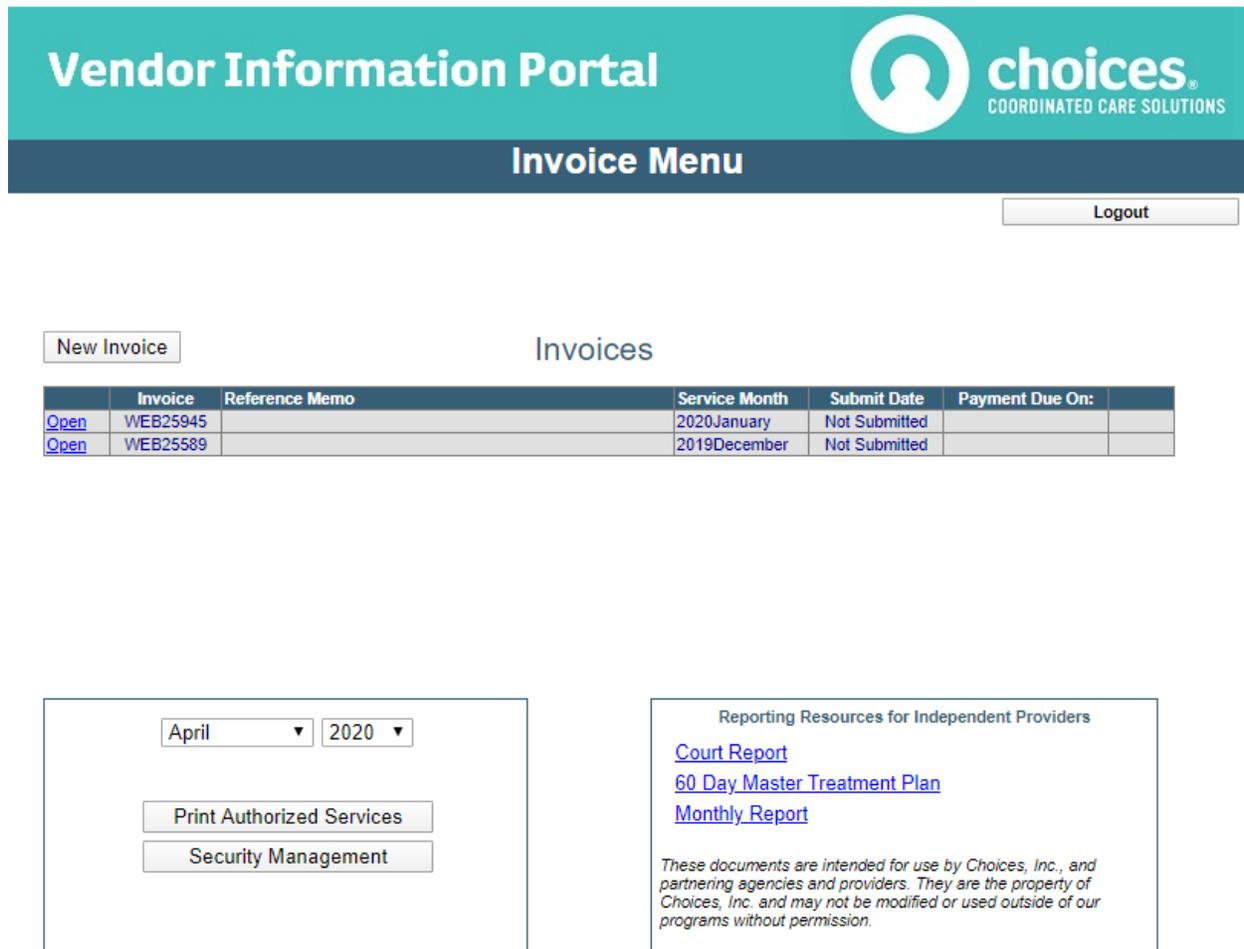
Creating an Invoice

In order to create and submit a valid invoice using the online billing system, please keep in mind the following guidelines:

- Services cannot be invoiced until the first day of the next month. For example, the earliest you may submit any invoice for March services is April 1st.
- Services cannot be invoiced after 90 days. For example, all services performed in March must be invoiced between April 1st and July 1st. If, for some reason, you must enter an invoice after the 90-day period, you will need to email claims@choicesccs.org for further assistance.
- Please put all billing (for multiple clients, multiple dates) on one invoice. You cannot submit multiple invoices for the same month. If you ever need to do an additional invoice, which will require an override, you will need to contact claims@choicesccs.org.
- Services cannot be entered for dates in which the client is not enrolled.
- Service date cannot be a future date.
- Dates on the invoice should correspond to the actual date services were provided. Use a separate line for each service provided per client.
- If the service provided is billable at the same rate for a period of time, billing on one line with a range of days is acceptable. For example, residential placement or Foster Care services would be billable on one line with a date range.

Invoice Menu

After entering the Online Billing section of the Vendor Information Portal, you will see the "Invoice Menu" screen (*Figure A1)*. From this screen, you will be able to see all the invoices you have created as well as their submission status. You will be able to create new invoices, access security maintenance, as well as print a list of authorized services that you may bill for.

Figure A1

Entering an Authorized Service

On the Invoice Menu screen, click the "New Invoice" button. You will be given the option to select the month and year of the service you are billing for *(Figure A2)*.
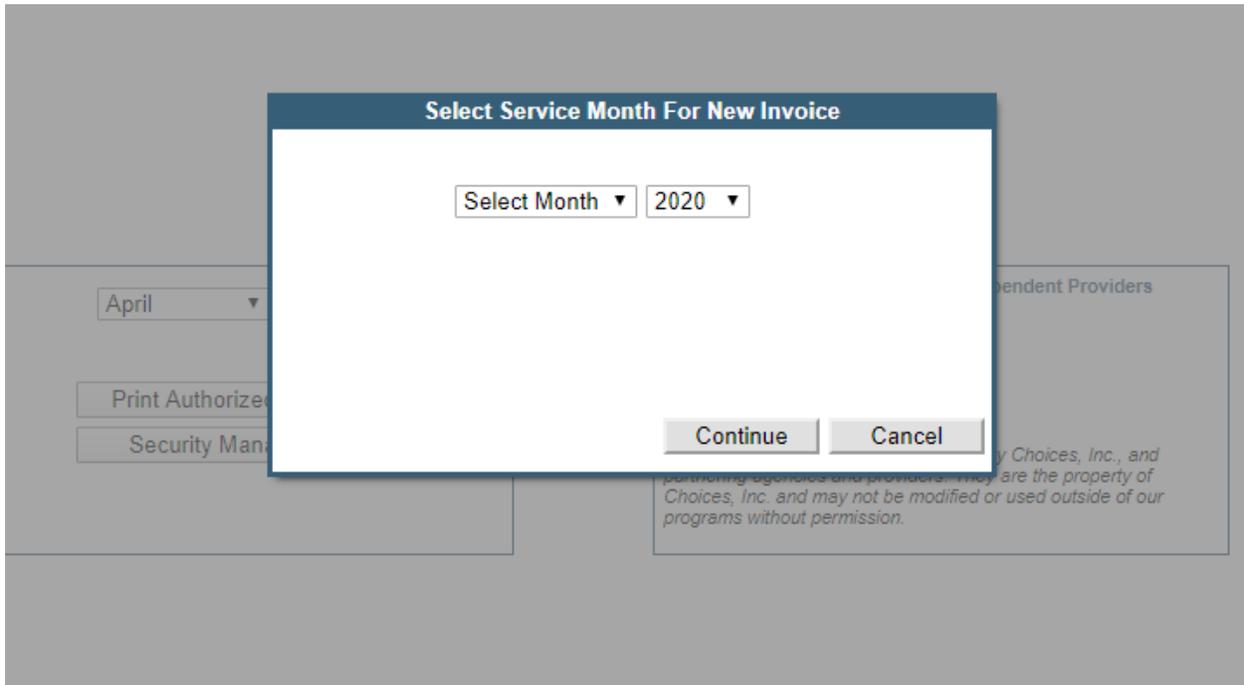
After clicking "Continue" you will enter the Invoice Items screen *(Figure A3).* The following steps will outline the procedure to enter billable services on your invoice:

1. Enter the date in which the service was completed. Press <Tab> on your keyboard.
2. After the date has been entered, click the "Get Client List" button to activate the dropdown list with clients that were authorized to receive services. Select client and the client's ID number will be entered automatically.
3. Select the appropriate service code, provider name, quantity of the units of service, type of units, and unit cost. The line total will be calculated automatically. In the "Memo" field, you may enter any information (your invoice number, reference number, invoice description, etc.) to allow you to readily be able to identify an invoice on the Invoice Menu screen. Click the "Update Memo" button to save your memo entry.
4. Click the "Save to Invoice" button to add that service to your invoice. If the service has a valid authorization, it will be added. Otherwise, a message box will indicate why the service was not added to the invoice. If you determine that a data entry error was not made, you made add the service as a pending service by clicking the "Services Pending Approval" button *(see Entering a Pending Service on page 9)*.

5. Units should be billable in whole units or quarter hour units only. Invoices containing fractional units, other than quarter hour, will be put in pending or denied.

Vendor Information Portal

choices.
COORDINATED CARE SOLUTIONS

Invoice Items

| Invoice Menu | Logout |

Service Month is: December 2019

Service Entry

Service Date: _____

Client: _____ ▼ Get Client List

Status:

Coordinator:

Service Code: ____ ▼

Provider: **Select** ▼

Billing Unit:

Quantity: _____   Total:

Unit Cost: ____ ▼   _____

Vendor Billing Information

Agency Name: TRAINING AGENCY (PROVIDER TRAINING)

Address: 1234 Best Street

_____

City: Indianapolis

State: Indiana ▼

Zip: 46205 - _____

Telephone: 317-201-3000

Email: Tbates@choicesccs.org

☐ Edit Contact Information   Save

| Pending Services | Print Friendly Format |

1 pending service.

TCM Invoice: WEB25589   Memo: _____   Update Memo

	Date	Client Name	ClientID	Code	Provider	Units	Type	Unit Cost	Total	Processed	DOC
Delete	12/01/2019	CLIENT1 (PROVIDER TRAINING)	78517		8888 STAFF TRAINING AGENCY	1.00	Hour	$100.00	$100.00	NO	Add
Delete	12/05/2019	CLIENT1 (PROVIDER TRAINING)	78517		8888 STAFF TRAINING AGENCY	2.00	Hour	$100.00	$200.00	NO	Add
							Grand	Total	$300.00		

| Submit Final Invoice |

Figure A3

Changing Billing Information

On the Invoice Items screen, you have the option to change your billing information by checking the box labeled "Edit Contact Information." Checking this box will enable you to modify and save your billing information.

Importing Billable Services

On this screen you may also import services from a specially formatted file that may be exported from your in-house billing system. This feature is not enabled by default. Activation of this option must be requested.

Sorting

You can sort by date, client name, service code, provider name, or submitted status by clicking on the heading titles. The sort enabled columns have a brown color to the heading text. This feature is available on the Invoice Items, Pending Items, and "Print Friendly" screens of the online billing section.

Entering a Pending Service

- At times, you may not be able to enter a service to your invoice. This happens when:

  - There is no authorization for the service being invoiced.
  - The requested dollar amount, number of units, or billing rate has not been authorized for this service.

A message box will prompt you to enter the service as a "Service Pending Approval." To enter a service as pending or to check on existing pending items, click the button "Services Pending Approval." You will be taken to the "Pending Services" screen *(Figure A4)*.
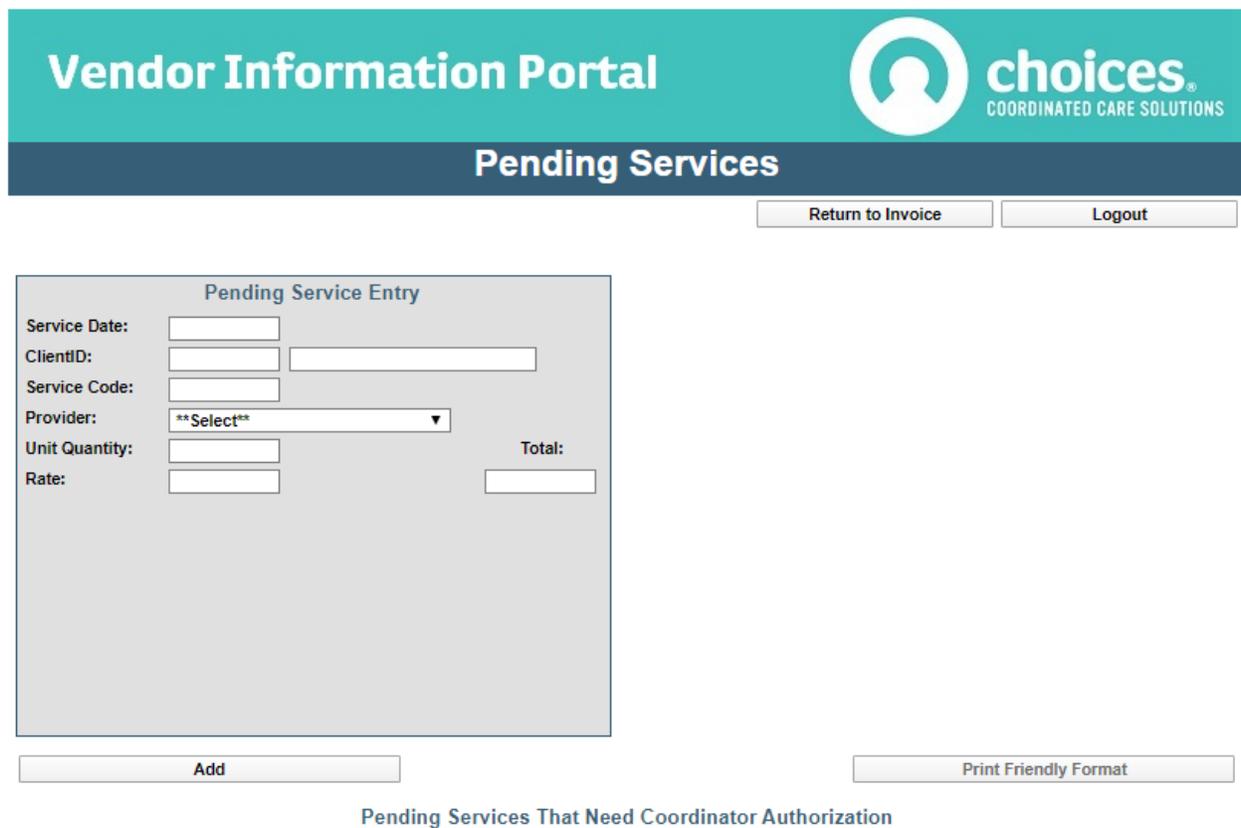
Figure A4

On the Pending Services screen, you can create a list of services that you feel should be authorized. Entering services on this screen is similar to adding services on the Invoice Items screen.

Once you have entered the necessary information, click the "Add" button. Within the list of items, you have the option of deleting or editing the pending service. You may also select the "Add to Invoice" link. If any authorization matches this service, the item will disappear, thus indicating that the service has been approved and has been added to your invoice.

If an authorization for this item does not exist, a message box will alert you as to why the service cannot be added to the invoice at this time. You may call the care coordinator of your client to expedite the authorization process.

After pending items have either been added to invoice items or still remain as pending, click the "Return to Invoice" button in the navigation row to return to the Invoice Items screen.

Submitting Final Invoice to Choices

After all of your services have been entered, you may click the "Submit Final Invoice to Choices" button. Before clicking this button, keep the following in mind:

- You will <u>not</u> be able to add any **new** services to this invoice after you have submitted the invoice.
- You can add (*actually move*) services already entered as pending to the invoice items section.
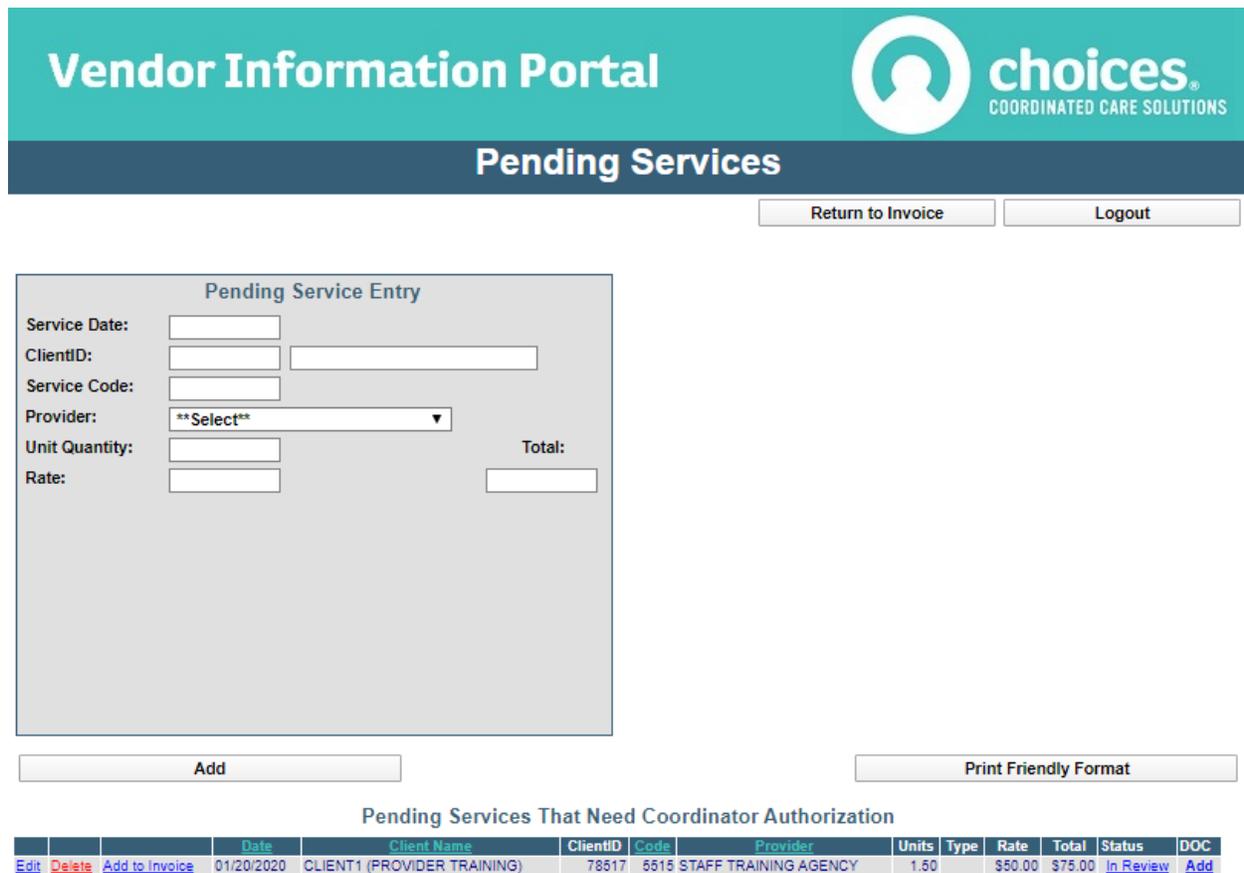-

Your billing cycle will begin the day you submit your invoice to Choices. The billing cycle begins **even if there are pending items yet remaining.** For this reason, we encourage you to submit your invoice as soon as ALL services have been entered (*regardless of some items possibly being in pending status*). If there are pending invoice items, the system will check the authorization status of those items. If items are still not authorized, an email will be sent to the appropriate Choices staff automatically. If the submission is successful, you will be redirected to the Invoice Menu.

After your invoice has been successfully submitted, the system will automatically notify Choices' personnel that your invoice has been completed. Please remember that before a successful submission of an invoice, you will have the option to view, delete, or print that invoice; however, if the invoice has been successfully submitted, you will not be able to delete it.

Managing Pending Items After Invoice Submission

If you have already submitted an invoice and there are pending items on the invoice, you may access the pending items by clicking the "Services Pending Approval" button on the Invoice Items screen.

On the Pending Services screen, you will see a new button labeled "Request Authorizations for All Pending Services" *(Figure A5)*. Clicking this button does a "batch" request for all pending services. If there are still pending items after clicking this button, you will receive a message indicating that. In addition, an email will automatically be generated by the system to notify the appropriate care coordinator of the authorization request for all remaining pending services. **Only after** an invoice submission has been initiated, will an email indicating an authorization discrepancy be generated by the system.

Figure A5

Printing Invoices

You may print an invoice at any time by clicking the "Print Friendly Format" button on the Invoice Items or Pending Items screens. After an invoice has been successfully submitted and closed, you may print an invoice by going to the "View Invoice" screen *(Figure A6).* You are automatically redirected to this screen from the Invoice Menu when you choose to open an invoice that has already been submitted.

Figure A6

Click "Print Friendly Format, and a pop-up like this will appear *(Figure A7)*:
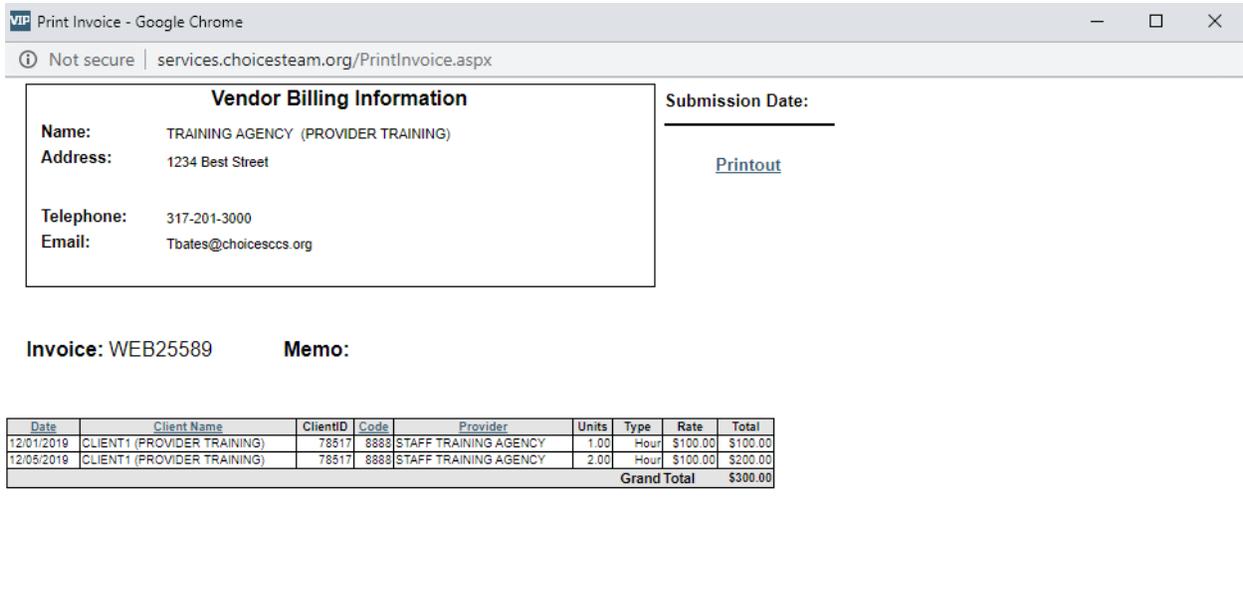
Vendor Billing Information

Name:	TRAINING AGENCY (PROVIDER TRAINING)
Address:	1234 Best Street
Telephone:	317-201-3000
Email:	Tbates@choicesccs.org

Submission Date:

Printout

Invoice: WEB25589   **Memo:**

Date	Client Name	ClientID	Code	Provider	Units	Type	Rate	Total
12/01/2019	CLIENT1 (PROVIDER TRAINING)	78517	8888	STAFF TRAINING AGENCY	1.00	Hour	$100.00	$100.00
12/05/2019	CLIENT1 (PROVIDER TRAINING)	78517	8888	STAFF TRAINING AGENCY	2.00	Hour	$100.00	$200.00
							Grand Total	**$300.00**

Figure A7

Printing Authorization Reports

On the Invoice Menu screen, you may print a list of all authorized services for a given date range. This report *(Figure A8)* will show you the client name, client ID number, service codes and descriptions, authorization date range, and other helpful information.
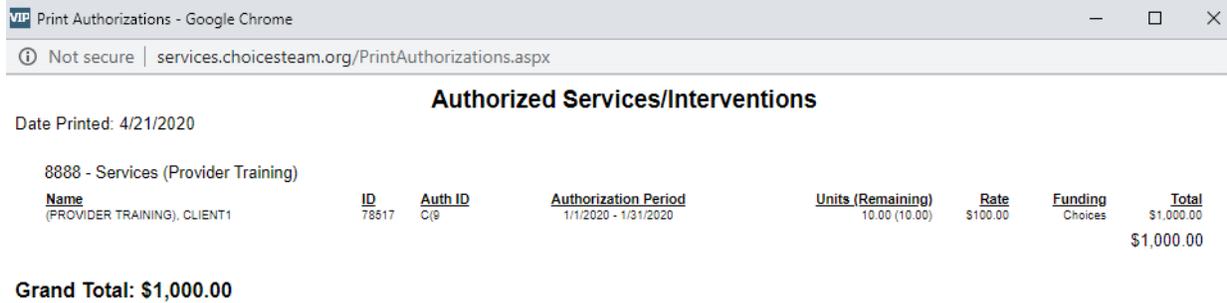
Figure A8

Security Management

From the Invoice Menu you can access your login profile as well as the profiles of your staff by clicking on the "Security Management" button. Once inside the Security Management" screen *(Figure A9)* you can change your password for your login ID as well as setup user access for additional personnel.
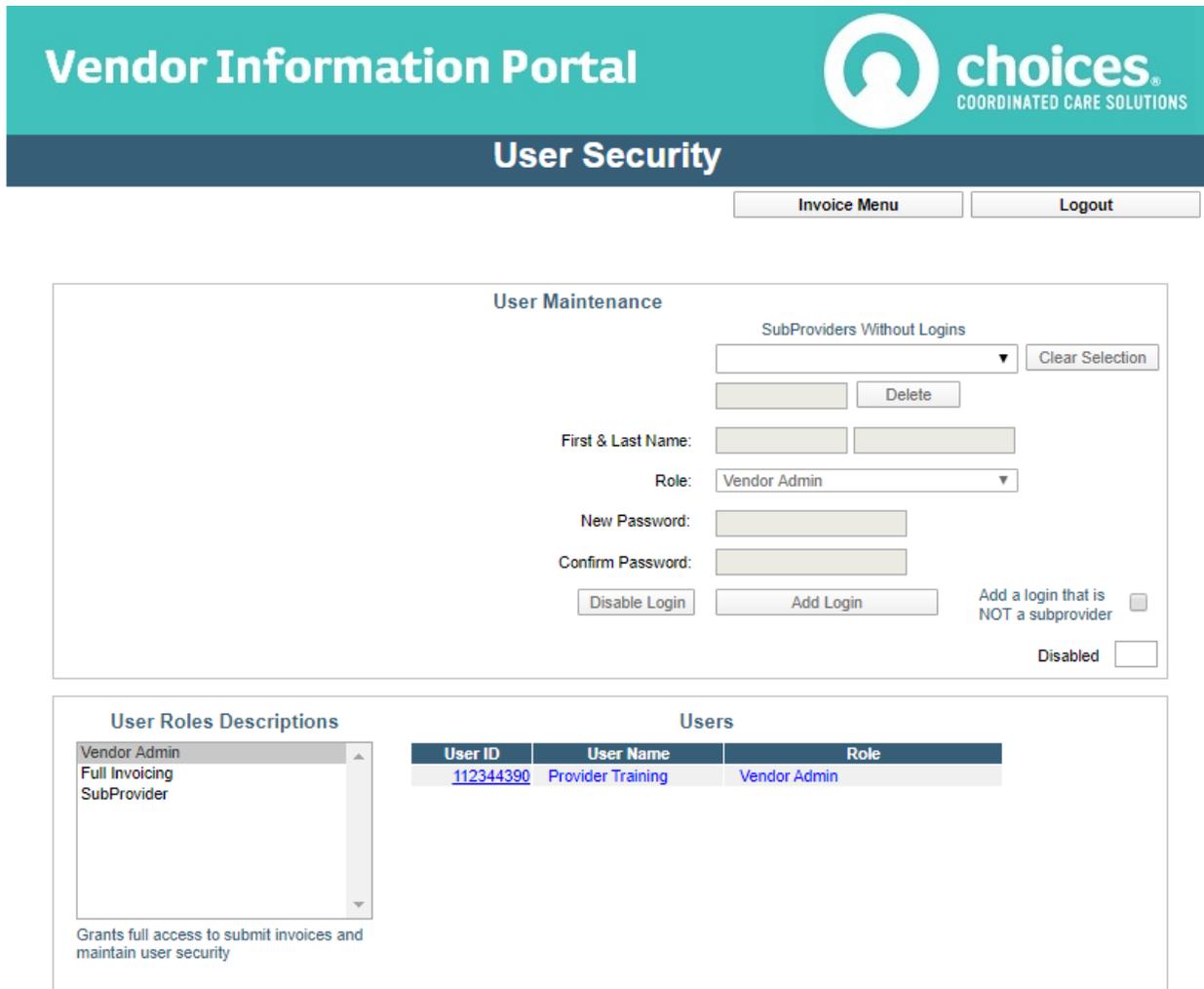
Changing Vendor Password

 In order to change your password, simply enter your new password on the appropriate field and repeat entering your password in the space provided directly below your new password. Both entries must be identical. Also, passwords must contain between 8 and 16 characters, contain at least one numeric character, at least one capital letter, at least one lowercase letter, and at least one special

character (!, #, $, etc.).

User Roles

Each Vendor Information Portal login user must be assigned a role. Roles determine the type of access that a login user has while using the Vendor Information Portal. You may find a list of pre-defined user roles under "User Roles Descriptions". By selecting the role, you may see a description of the level of access each role gives to a user. Roles containing "Contracts" in the description only apply to online renewals which are discussed in another manual.

Managing User Access

With exception to adding a user with the "SubProvider" role, you must check the box "Add a user that is NOT a SubProvider". You must then specify a first name, last name, and a password (with same password complexity restrictions as mentioned previously). After entering this information, click the "Add Non-SubProvider User" button to complete the process.

SubProvider Access

If you want to add a user with the "SubProvider" role, you must select SubProviders that ALREADY exist in the dropdown list. If you need a login ID for a SubProvider that is not in the list, you may contact the Claims department at Choices at claims@choicesccs.org to have the desired SubProvider added to the list; after which, you will need to add a login ID for that SubProvider. The process for adding users with the SubProvider role is the same as adding other users except:

1. Do not check the box "Add a user that is NOT a SubProvider."
    1. SubProvider must be selected from the dropdown list.
2. Click the "Add Sub-Provider Login" button.

You may also delete login IDs (*thus requiring re-adding the login to give that user access to the system*) or you may temporarily disable and enable login IDs.

Please keep in mind the following regarding user access:

- Logging into the Vendor Information Portal with the Vendor ID gives MASTER level access. For this reason, do not share your Vendor ID and password with anyone. Instead, use the "User Security" section to add users with the appropriate level of access that you deem to be necessary.
- Currently, passwords must be changed every 90 days. Reusing passwords is restricted. If you need to change your password within a 2-day period, you must contact Choices technical support. If your password expires, you will be forced to change your password before continuing.
- Users with SubProvider level access must select an already existing invoice to add their service entries, so the invoice must have already been created.

- After opening an invoice, SubProviders will only be able to add services (approved or pending) that will be linked to their "provider" name. They will only be able to view services (as well as dollar totals) that they enter. After a final submission of an invoice, sub-users will not have access to the invoice at all.

Reporting Problems

If you experience technical difficulties such as unexplained error messages, please send an email to claims@choicesccs.org .