AccuCare Billing Setup Checklist – Pre-Orientation/Training

These items are to be completed before Billing orientation or training.

Setup Area	Description	Notes	Complete
Business Info	This is your default business location (where the checks get sent to). Typically however many Tax ID's you have will determine how many businesses you have. *Includes:* - Address - Tax Identification Number - NPI number - Taxonomy Number	When you enter a business, it will automatically add it to the Locations of Service list. It is a default function.	☐
Location of Service	These are additional locations you may bill under. *Includes:* - Address - NPI number (if different from Business)	If one of the locations was setup in "Business Info" (and duplicated when entered into this module) then you will need to delete the duplicate	☐
Services	This is your initial crosswalk from your session types. Enter in the standard costs that YOUR agency charges. *Includes:* - Descriptions - Insurance codes - if applicable (CPT or revenue) - Charge amounts/Rates	Use your session types list as a guide to enter in each services and charges (fees).	☐
Provider Info	Enter all providers that will be providing and charging for services. Most will be clinical users of AccuCare, but may also be non-users of AccuCare. *Includes:* - Provider Name - Credentials - NPI number - Taxonomy Number	This is where you link clinical users of AccuCare to be providers you can charge services for. In addition, you may have a doctor or other provider that doesn't use the clinical features of AccuCare, but you still want to bill for services, so you would add them here.	☐

Payer	This is to setup the different payers. This may be different contracts, funding sources, insurance companies. MediCaid, Blue Cross or State specific contracts are examples. *Includes:* - Name of company (insurance, contract, etc.) - Address - Overrides for insurance (if applicable)	Include all payers for all clients.	☐
Contract Rates	This is where you setup the different rates for each contract/payer. *Includes:* - Contract name (and association to a payer) - Contract rate (vs the existing default agency rate)	This features allows you to handle different pay rates and fees for services, and different payer types, depending on the program.	☐
Accounting Codes	Provide a Chart of Accounts list to work with Orion to crosswalk client charges with your agency's accounting records	This will allow you to generate reports that match your operational accounting codes	☐