

Billing Cheat Sheet

This article provides a reference to billing system elements and terminology.

Roles Required: Super User, Billing

Permissions Required: N/A

Account Type				
Name	Id (for imports)	Description	Key Characteristics	Examples
Hourly Services	1	Used for any type of individualized service where an employee is working with one client at a time in any capacity. Funding source pays based on service provided (hourly, daily, milestone, etc.).	<ul style="list-style-type: none"> • <i>Not</i> site-based • Employee works with 1 client at a time 	<ul style="list-style-type: none"> • Behavior Consultation • Respite/Relief Care (Hourly or Daily) • Skills Training • Vocational Services where one employee works with one client at a time and is <i>not</i> at a site.
Residential Program	2	Client lives at a residential program and employees clock in and out at that program. Funding source pays based on client attendance.	<ul style="list-style-type: none"> • Site based • Employees punch at the program, can work with 1+ clients at a time • Client attendance is generated 	<ul style="list-style-type: none"> • 24 Hour Residential Programs • Service Codes would include: Residential, Rent
Day Program	3	Client attends a facility of some sort and employees clock in and out at that	<ul style="list-style-type: none"> • Site-based • Employees punch at the program, 	<ul style="list-style-type: none"> • Activity centers • Job sites • Rehab centers, etc.



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		facility. Funding source pays based on client attendance.	<ul style="list-style-type: none"> can work with 1+ clients at a time Client attendance is generated 	
Group Service	4	Client receives service in any location and is not tied directly to a site. Employees can work with one or more clients at a time in any capacity. Funding source pays based on service provided (hourly, daily, monthly, milestone, etc.)	<ul style="list-style-type: none"> Not site-based Employee works with 1+ clients at a time 	<ul style="list-style-type: none"> Oregon Supported Living Oregon Day Services Group Therapy
Parenting Program	13	Client lives at a foster home/professional parent home and employees clock in and out at that home. Funding source pays based on client attendance.	<ul style="list-style-type: none"> Site based Employees punch at the program, can work with 1+ clients at a time Client attendance is generated 	<ul style="list-style-type: none"> Professional Parent Homes/tracking
Transportation	14	Client lives at a residential program/professional parent home and receives funding for transportation. Funding sources pays based on client attendance and transportation provided.	<ul style="list-style-type: none"> Site-based Attendance based 	<ul style="list-style-type: none"> MTP
Client Transportation	15	Client receives transportation services and the mileage is billable to the client's funding source.	<ul style="list-style-type: none"> Not Site-based Employee works 1:1 with client. 	<ul style="list-style-type: none"> Transporting to the community for hourly services.



Billing Unit		
<p>Note: Billing Units are <i>not</i> tied to how an employee punches. Billing units can be provided in a variety of account types. Just because a billing unit is hourly, does not mean that it has to be tied to an Hourly Services Account. Similarly, just because a billing unit is Daily, does not mean that it has to be tied to a Day Program Account.</p>		
Name	Id (for imports)	Description
Hourly	2	Paid per hour worked. Is not tied to how the employee punches. Can be billed per hour, or can be rolled up into a daily, weekly, or monthly unit (see below).
Daily	3	Paid per day of service provided, regardless of the number of hours worked. Can be billed per day, or rolled up into a weekly or monthly unit (see below).
Monthly		Paid per month of service provided, regardless of the number of hours worked.
Miles	7	Paid per mile. <i>Note:</i> An hourly account type can have a billing unit of miles. Can be billed per mile, or can be rolled up into a daily, weekly, or monthly unit (see below).

Billing Rounding Increment		
<p>Note: Billing Rounding is available for service codes with hourly units. There are four type of rounding and four increments to select from.</p>		
Name	Id (for imports)	Description
None	0	Do not round - every minute is billed
15	25	Round to the 15 minute mark (quarter hour)
30	50	Round to the 30 minute mark (half hour)
60	100	Round to the hour mark (hour)

Billing Rounding Type		
<p>Note: Billing Rounding is available for service codes with hourly units. There are four type of rounding and four increments to select from.</p>		
Name	Id	Description
Round	1	Round up or down to the nearest increment
Truncate	2	Always round down
Increment	3	Always round up

Billing Rollup Type			
Name	Id	Description	Examples
None	1	Every billable punch entry is itemized on the billing file.	For example, two employees each work a 2 hour respite shift for Johnny on the same day. Respite has a billing unit type of hourly. The billing file will show two billing entries for 2 units each.
Daily	2	The billing files shows one line per day per Service	For example, two employees each work a 2 hour respite shift for Johnny on the same day. Respite has a billing unit type of



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		Code, with each line representing the number of billable units used that day under that Service Code.	hourly. The billing file will show one line item for a total of 4 units consumed that day.
Weekly	3	The billing file shows one line per week per Service Code, with each line representing the number of billable units used that week under that Service Code.	For example, one employee works a 2 hour respite shift for Johnny on Monday, Wednesday, and Friday. Respite has a billing unit of hourly. The billing file will show one line item for a total of 6 units consumed that week.
Monthly	4	The billing file shows one line per month per Service Code, with each line representing the number of billable units used that month under that Service Code.	For example, Johnny receives services in a residential 24-hour program. Residential services has a billing unit of daily. If Johnny was present at the program for 28 out of 31 days in the month, the billing file will show one line item for a total of 28 units consumed that month.

