

New Customer Checklist

The following things must happen before billing can be performed. While this is the usual order of things, they can happen in any order.

- OHCA contract approved/renewed
- da Vinci informed of:
 - OHCA contract approval/renewal
 - List of facility names, NPI, taxonomy, and provider numbers
 - Oklahoma tax ID
 - Contact name
 - Contact phone
 - Contact email address
- da Vinci contract approved
- da Vinci Business Associate Agreement approved
- da Vinci added/confirmed as clerk to OHCA provider website
- da Vinci linked/confirmed to DMH PICIS website
- Login created/confirmed for da Vinci website
- HPES switched/confirmed for electronic transactions (might be done already)
- Spreadsheet of client information submitted (optional)

Administration Tips

Several extra information lines are available to administrators on their cockpit. The cockpit is color coded and the basic guideline is to eliminate as much color as possible, especially red. One common cause of Rejected progress notes is overlapping times, and there is a dedicated report available to all users called the NoteDoubleBill to help resolve overlapping times. Depending on the amount of billing performed, the desire to maximize the amount paid, and how often the administrator does it, administrative tasks can take anywhere from a few minutes to a few hours a week. The longer the tasks go undone the longer they will take to complete. There is also a detailed help file available on the website and form inside the application. As always da Vinci is standing by to provide support. During the transition it is practically required to pick a handful of your more computer savvy therapists to transition first. After that transitions usually go best when they are performed one facility/provider ID at a time. In the documentation we generally refer to anybody that writes a progress note in Milan as a therapist, and anybody who is receiving services as a patient.

- da Vinci Support – Phone: (866) 773-3867, Fax: (405) 773-8675, Email: support@milanmedical.com
- OHCA Support – Phone: (800) 522-0114
- HPES Support – Phone: (405) 416-6801, Fax: (405) 947-3394

Switching EDS to Electronic Transactions

What the OHCA expects most providers to do is to use their website to enter billing information and then mail the results back in a big stack of paper (called an RA or EOB). They further expect you to go through the results by hand to make sure that you got paid for what you asked to get paid for. Our system replaces this cumbersome and error prone system with one that is much more efficient and easier to use. However, to use our system you first need to tell the HPES that you would like to submit and get your results electronically for each facility as you transition to us. You only need to do this once, and you will need to inform the HPES should you ever wish to switch back to paper results. Please do not switch back without informing us first because it royally screws things up for us if we don't know about it. Furthermore, the only time you should switch back to paper is if you should decide that you no longer require our services. OK, here's what you need to do:

Go to the Internet, download the HPES form, and print it out: http://www.okhca.org/provider/billing/pdflib/edi_providers.pdf

- For the first subsection, when in doubt check “Facility”.
- The next subsection is pretty self explanatory except for “Provider ID/NPI” which is both vague and kind of pointless if you have multiple provider numbers. NPI numbers and OHCA provider numbers are basically interchangeable as far as HPES is concerned, but they seem to prefer provider numbers. So put your provider number in that spot, and if you have multiple provider numbers just pick your favorite one.
- In the next subsection (EDI Software Vendor) enter da Vinci Network Services, (Address) PO Box 3196, OKC, OK 73101, (Name) James Bearden, (Phone)(405) 773-3867, and (Email) support@milanmedical.com.
- In the next subsection check 837 Professional, 270/271, 835, and 276/277.
- In the first subsection of the second section check “Enable 835” and enter your provider numbers and a descriptive name that goes with the provider numbers. If you have more than four provider numbers you can attach a list.
- In the next subsection, do not check the "Elect a Designated Receiver" box and leave the entire subsection blank.
- If you have multiple provider numbers, somewhere on the form write "Please allow submitting files for all provider numbers."
- Sign and date the form near the bottom, and fax the form to HPES: (405) 416-1426.

Patient and Therapist List Formats

To facilitate entering or updating large amounts of patient or therapist information, da Vinci can import a spreadsheet of some information into the system as long as the information is separated into discreet columns. In other words, instead of having one column for address, there needs to be separate columns for address, city, state, etc. Common list information for patients is name, date of birth, social security number, Medicaid number, address, and diagnosis code. Common list information for therapists is name, credentials, taxonomy, and NPI. Lists can be emailed, but it is a better idea to upload them via the website once you have a Milan login.