

## Encounter Reporting Certification Worksheet

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The purpose of the encounter reporting certification process is to ensure that each organization can demonstrate a thorough understanding of the interfaces required between their service processing system and the encounter reporting application. Each organization is required to complete an encounter submission test process, submit monthly reconciliation summary reports, and pass an initial certification audit of production source and transmitted data. Requirements of the encounter reporting certification process include the following components:

- Each organization must successfully complete a series of test worksheet scenarios on different types of claims data and submit test XML files. These tests serve as a basis for ensuring that most service scenarios are executed through the testing process. All related edits and errors are reviewed during this process, minimizing any unexpected errors when the organization begins submitting actual data to the encounter application. Upon successful completion of this testing process, each organization demonstrates their readiness to begin submitting encounters and have earned their readiness certification to submit production claims data to the encounter production application.
- Each organization is required to submit accepted encounter transactions for the first (and subsequent) month of posted services by a specified date in the month following the reporting month (i.e., claims posted in January will be submitted in February). Monthly reconciliation reports must be submitted beginning the second quarter after cutover from HSRS to LTCare Encounter, and include reconciled historical summary reports each month following the first month of operation.
- The organization is required to provide documentation to support an audit of submissions. The Department performs audits of randomly selected production transaction and organization source data items to verify the accuracy of the encounter transactions in relation to the source data. In addition to transaction sampling, the Department requires that encounter transactions can be reconciled to financial reports.

This worksheet is the first step in encounter reporting certification. The contact person for questions regarding this worksheet is Ron Wollner, who can be reached at (608) 267-2930 or [Ron.Wollner@wisconsin.gov](mailto:Ron.Wollner@wisconsin.gov).

Please provide responses that are thoughtful and that accurately reflect your current system. This worksheet will be evaluated as part of your organization certification process. Additional iterations of this worksheet may be required and must be completed satisfactorily before moving to the next step in the encounter certification process.

The following test scenarios are provided to assist the Department in certifying an organization's ability to provide data from their system in the encounter format. This worksheet is not intended to provide an exhaustive list of scenarios and it does not represent all fields that may be involved in a given transaction.

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Use the scenarios below to illustrate the encounter record that would be provided by your current system for each circumstance. A template is provided for each scenario, and identifies specific fields for that circumstance. One blank line is provided for illustration purposes. Actual responses may require more than one encounter record line to fully report the details of the scenario.

- Please provide all components required to meet the scenario, including both original and adjusting records.
- In cases where the information is not specifically provided, organizations should assume any information needed to record the encounter. While specific service information is not provided in all cases, responses are expected to include appropriate service coding information. Responses must indicate all assumptions made.
- In some cases, more than one response scenario may be acceptable.
- Submissions may only contain line items for postings prior to the submission date, so some of these scenario details will be submitted in multiple, separate files.

### MH Scenarios

1. The organization authorizes individual MH counseling service for provider A to perform 1 hour of service once a week for a particular MH member in the high intensity target group. The member receives the service every Monday in August 2009, the bill/invoice was received and posted on 9/16/2009.

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjustment Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	BRC Target Population	Commitment Status	Diagnostic Impression 1	Provider ID	Posting Date

2. On 10/6/2008 it was discovered the member was out of town on the second Monday of August 2009 and therefore did not receive counseling that day. The service was recorded in scenario 1.

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjustment Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	BRC Target Population	Commitment Status	Diagnostic Impression 1	Provider ID	Posting Date

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3. The organization provides 2 hours of a situational service of crisis intervention at the emergency room for a member on August 20, 2009.

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjustment Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	BRC Target Population	SPC delivery year month	Diagnostic Impression 1	Provider ID	Posting Date

4. It is discovered on 10/05/2009 that the crisis intervention service in scenario 3 took place at a residence and not at the emergency room.

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjustment Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	BRC Target Population	SPC delivery year month	Diagnostic Impression 1	Provider ID	Posting Date

### AODA Scenarios

5. The organization does an intake assessment for a new member on Monday September 14, 2009.

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjust. Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	Employment Status	Substance Problem Primary	Usual Route of Administration Primary	Use Frequency Primary	Provider ID	Posting Date

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6. The organization authorizes two hours of community support for a member each week. One hour of support is provided to the member every Tuesday and Friday for the month of May 2009 and posted on the same day the service is given. Show the services through May 9, 2009.

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjust. Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	Employment Status	Substance Problem Primary	Usual Route of Administration Primary	Use Frequency Primary	Provider ID	Posting Date

7. The organization closes the community support for the client in scenario 6 on June 1, 2009 and enters the member in comprehensive community services the same day which is the first day of receiving the new service.

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjust. Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	SPC End Reason	Substance Problem Primary	Usual Route of Administration Primary	Use Frequency Primary	Provider ID	Posting Date

8. The member completed all services with major improvement on August 14, 2009. The member was a youth and in a residential group home

Record ID	Parent ID	Original ID	Characteristic 1	Record Type	Adjust. Type	Quantity	Service Date From	Service Date To	SPC	Unit or basis of measurement	Brief Service	SPC End Reason	Close status A	Close status E	Close status F	Close status AR	Close status LA