

<p style="text-align: center;">York/Adams Drug and Alcohol Commission Treatment Policy and Procedure Manual</p>	<p><i>Number: F-3</i></p> <p><i>Policy: Case Management Invoicing Report</i></p>
<p><i>Creation Date : 6/1/20</i> <i>Effective Date: 7/1/2020</i></p>	<p style="text-align: right;"><i>Page: 1 of 2</i></p>

I. Purpose:

To outline how Case Management Services are reported and invoiced to the SCA.

II. Policy:

Case Management is a coordinated approach to the delivery of health, substance use, mental health, and social services, and linkage of individuals with appropriate services to address specific needs and achieve stated goals.

Reporting & Billing (Activity Code 9100):

Using the *Case Management Invoicing Report*, the case manager must track all case management services conducted, including face-to-face meetings or case management services on behalf of clients such as phone calls and paperwork. Services must also be tracked regardless of funding stream.

The following information must be reported on a monthly basis:

- a. Client's "Last Name"
- b. Client's "First Name"
- c. Client's "Unique Client Number" (*UCN from WITS*)
- d. Service Date
- e. Number of units for "Face-to-Face Meetings"
- f. Number of units for "On-Behalf of Client" services
- g. Billed To: (*YADAC, CCBH, or Private Insurance*)
- h. Rate: (*YADAC's rate only*)
- i. Billed Amount
- j. Case Management "Start Date"
- k. Case Management "End Date"
- l. MA/CCBH Eligibility Date

All Invoicing/Reports must be submitted via e-mail in excel format. The *Case Management Invoicing Report* must **be password protected** using the following instructions:

- Once form is completed with information. Go to "File" and "Save As"
- On the dropdown menu under "Tools" select "General Options"
- Enter a Password and click "OK".
- You will be prompted to reenter the password. Reenter and click "OK"
- After entering file name click "Save"
- When you go to open the file you will be prompted to enter the password you selected. Enter password.
- You have just password protected a confidential information spreadsheet.
- Attach to email and send to intended recipient. You must send the password in a separate email to open.

Monthly reports/ invoices shall be submitted within 15 calendar days from the last day of the month within which the work is performed. The final invoice shall be submitted within 15-days of the contract agreement's termination date. YADAC will neither honor nor be liable for invoices not submitted in compliance with the time requirements outlined in this paragraph. Any exceptions to this will not apply without written documentation that YADAC agrees to an extension of these requirements.

Approved By:

Audrey Gladfelter

YADAC Administrator

6/1/20

Date