**User Story ID:** US317

**User Story Name:** Corrected EEOB Attach to Claims

**Priority (H, M, L):** H

**Sizing:** 21

**Author:** Susan Kersten

# Story:

# If a payer sends a bundled payment OR the incorrect claim number in the claim number (CLP01) field, the clerk must edit the claim number using ‘split/edit’ to enter the correct claim number. IF the Electronic Explanation of Benefits (EEOB) is received WITHOUT a valid claim number in the CLP01 field, the EEOB will post to the exceptions and the clerk must correct the number and fix the exception, prior to posting the Electronic Remittance Advice (ERA). (VistA will not allow posting of the ERA until exceptions are cleared). If the EEOB is corrected in the exceptions list, the EEOB should ‘attach’ to the correct claim.

# If the claim is valid in VistA, but is incorrect for the claim being paid, the clerk still needs to correct the claim number using the split/edit option. HOWEVER, the EEOB DOES NOT post to the correct claim, when making the corrections in the worklist or the APAR. VistA needs to append the EEOB to the correct claim, regardless of when the split/edit is completed.

# If a patient comes in and requests ALL their medical records, it must include all copies of EOBs or EEOBs. Facilities need EEOBs to attach to the patients claims, to ensure they are HIPAA compliant.

# Detailed Listing of Acceptance Criteria

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| --- | --- | --- |
| Requirement ID | Description | External Dependency  (Y/N)  If Y, provide organization and description |
|  | 1. **The full claim payment amount is split to a new claim** |  |
| US317.01.A | When the full claim payment amount is split to a new claim and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB Move/Copy/Remove Audit Report** | N |
| US317.01.B | When the full claim payment amount is split to a new claim and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB TPJI/AR Account Profile/Comment History** | N |
| US317.01.C | When the full claim payment amount is split to a new claim and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **APAR and ERA worklist options to View/Print EEOB** | N |
| US317.01.D | When the full claim payment amount is split to a new claim and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **TPJI/Bill Charges screen** | N |
|  | 1. **The full claim payment amount is split to suspense** |  |
| US317.02.A | When the full claim payment amount is split to suspense and the EEOB is **marked as removed,** the system will automatically place the justification text " EEOB removed from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB Move/Copy/Remove Audit Report** |  |
| US317.02.B | When the full claim payment amount is split to suspense and the EEOB is **marked as removed,** the system will automatically place the justification text " EEOB removed from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB TPJI/AR Account Profile/Comment History** |  |
| US317.02.C | When the full claim payment amount is split to suspense and the EEOB is **marked as removed,** the system will automatically place the justification text " EEOB removed from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **APAR and ERA worklist options to View/Print EEOB** |  |
| US317.02.D | When the full claim payment amount is split to suspense and the EEOB is **marked as removed,** the system will automatically place the justification text " EEOB removed from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **TPJI/Bill Charges screen** |  |
|  | 1. **Claim payment amount is split partially to one new claim and partially to suspense** |  |
| US317.03.A | When the claim payment amount is split partially to one new claim and partially to suspense and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB Move/Copy/Remove Audit Report** |  |
| US317.03.B | When the claim payment amount is split partially to one new claim and partially to suspense and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB TPJI/AR Account Profile/Comment History** |  |
| US317.03.C | When the claim payment amount is split partially to one new claim and partially to suspense and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **APAR and ERA worklist options to View/Print EEOB** |  |
| US317.03.D | When the claim payment amount is split partially to one new claim and partially to suspense and the EEOB is **moved to the new claim** (by changing claim number on the EEOB), the system will automatically place the justification text "EEOB moved from claim XXXXX automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **TPJI/Bill Charges screen** |  |
|  | 1. **Claim payment amount is split between the original claim and multiple other claims** |  |
| US317.04.A | When the claim payment amount is split between the original claim and multiple other claims and the EEOB is **copied to multiple new claims** (existing EEOB remains), the system will automatically place the justification text " EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB Move/Copy/Remove Audit Report** |  |
| US317.04.B | When the claim payment amount is split between the original claim and multiple other claims and the EEOB is **copied to multiple new claims** (existing EEOB remains), the system will automatically place the justification text " EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB TPJI/AR Account Profile/Comment History** |  |
| US317.04.C | When the claim payment amount is split between the original claim and multiple other claims and the EEOB is **copied to multiple new claims** (existing EEOB remains), the system will automatically place the justification text " EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **APAR and ERA worklist options to View/Print EEOB** |  |
| US317.04.D | When the claim payment amount is split between the original claim and multiple other claims and the EEOB is **copied to multiple new claims** (existing EEOB remains), the system will automatically place the justification text " EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **TPJI/Bill Charges screen** |  |
|  | 1. **Claim payment amount is split between multiple other claims with no payment remaining on original claim** |  |
| US317.05.A | When the claim payment amount is split between multiple other claims with no payment remaining on original claim, the EEOB is **moved to the first new claim** (by changing claim number on the EEOB**) and the EEOB is copied to remaining new claims,** the system will then automatically place the justification text "EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB Move/Copy/Remove Audit Report** |  |
| US317.05.B | When the claim payment amount is split between multiple other claims with no payment remaining on original claim, the EEOB is **moved to the first new claim** (by changing claim number on the EEOB**) and the EEOB is copied to remaining new claims,** the system will then automatically place the justification text "EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **EEOB TPJI/AR Account Profile/Comment History** |  |
| US317.05.C | When the claim payment amount is split between multiple other claims with no payment remaining on original claim, the EEOB is **moved to the first new claim** (by changing claim number on the EEOB**) and the EEOB is copied to remaining new claims,** the system will then automatically place the justification text "EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **APAR and ERA worklist options to View/Print EEOB** |  |
| US317.05.D | When the claim payment amount is split between multiple other claims with no payment remaining on original claim, the EEOB is **moved to the first new claim** (by changing claim number on the EEOB**) and the EEOB is copied to remaining new claims,** the system will then automatically place the justification text "EEOB from claim XXXXX copied to claim(s) YYYYY, ZZZZZ automatically by AUTOPOST” or similar on the EEOB and will be displayed on the **TPJI/Bill Charges screen** |  |
|  | 1. **Claim payment amount is split between the original claim and suspense - no move or copy of the EEOB is performed** |  |
| US317.06.A | When the claim payment amount is split between the original claim and suspense, **no move or copy of the EEOB is performed**. The system must not place an automated message on the **EEOB Move/Copy/Remove Audit Report** |  |
| US317.06.B | When the claim payment amount is split between the original claim and suspense, **no move or copy of the EEOB is performed**. The system must not place an automated message on the **EEOB TPJI/AR Account Profile/Comment History** |  |
| US317.06.C | When the claim payment amount is split between the original claim and suspense, **no move or copy of the EEOB is performed**. The system must not place an automated message on the **APAR and ERA worklist options to View/Print EEOB** |  |
| US317.06.D | When the claim payment amount is split between the original claim and suspense, **no move or copy of the EEOB is performed**. The system must not place an automated message on the **TPJI/Bill Charges screen** |  |

# Constraints:

N/A

# Risks:

N/A

# Assumptions:

# The APAR/Worklist automatic move of EEOB will follow the same rules as the existing manual RCDPE EEOB MOVE/COPY menu option. The automatic update of EEOB information to reflect split/edit of claims will occur at receipts creation in the PRCA nightly auto post job (for APAR) or at receipt creation in the ERA Worklist.

# Approval Signatures

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**Revision History**

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| --- | --- | --- | --- |
| Date | Version | Description | Author |
| 1/03/2017 | v0.01 | Original / Initial | Chad Morrison |
| 2/15/2017 | V0.02 | Updated from elaboration sessions | Chad Morrison |
| 3/1/2017 | V0.03 | Acceptance criteria re-written based on scenarios 1-6 | Chad Morrison |
| 3/3/2017 | V1.0 | Final version for submission | Team Leidos |