

## Release of billing or medical information by providers

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This *Wisconsin Medicaid and BadgerCare Update* article clarifies how providers should handle requests for billing or medical information relating to services provided to Wisconsin Medicaid recipients.

### Medicaid standards for release of billing and medical information

Wisconsin Medicaid has specific standards regarding the release of a Medicaid recipient's billing information or medical claim records. A Medicaid recipient has a right to have this information safeguarded and the provider is obligated to protect that right. Therefore, use or disclosure of any information concerning applicants and Medicaid recipients for any purposes not connected with Wisconsin Medicaid administration is prohibited unless authorized by the recipient.

To comply with the standards, the following procedures are required to ensure the proper release of this information. These procedures are in accordance with HFS 106.04(4), Wis. Admin. Code, and clarify the information on safeguarding recipient confidentiality found in the Provider Rights and Responsibilities section of the All-Provider Handbook.

### Notifying Wisconsin Medicaid of requests — basic principles

Requests for billing or medical claim information regarding services reimbursed by Wisconsin Medicaid may come from a variety of individuals including attorneys, insurance adjusters, and recipients. The following are some basic principles regarding requests for claims information:

- A provider may not directly send a Medicaid recipient an itemized or summary billing. Wisconsin Medicaid will coordinate these requests.
- Providers are required to notify Wisconsin Medicaid when releasing billing information or medical claim records relating to charges for Medicaid-covered services except:
  - ✓ When the recipient is a dual entitlee (i.e., recipient eligible for both *Medicare* and Wisconsin Medicaid) and is requesting materials pursuant to *Medicare* regulations.
  - ✓ When the provider is attempting to exhaust all existing health insurance sources prior to submitting claims to Wisconsin Medicaid.

## **How to handle requests for billing information or medical claim records**

The following are different situations a provider may encounter and the appropriate actions for each situation:

### *A request from a Medicaid recipient or authorized representative*

1. The provider sends a copy of the requested billing information or medical claim record, along with the name and address of the requester, to the following address:

Wisconsin Medicaid  
Coordination of Benefits  
6406 Bridge Rd  
Madison WI 53784-6220

2. Wisconsin Medicaid will process and forward the requested information to the requester.

### *A request from an attorney, insurance company, or power of attorney*

1. The provider obtains a release signed by the recipient or authorized representative.
2. The provider furnishes the requested material to the requester, marked "BILLED TO WISCONSIN MEDICAID" or "TO BE BILLED TO WISCONSIN MEDICAID," with a copy of the release signed by the recipient or authorized representative and approval from Wisconsin Medicaid is not necessary.
3. The provider sends notice of the material furnished to the requester to Wisconsin Medicaid at the above address, with a copy of the signed release.

### *A request from a managed care enrollee*

If any of the above requests involve a recipient enrolled in a Medicaid managed care program, the provider is required to:

1. Obtain a release signed by the recipient or authorized representative.
2. Send a copy of the letter requesting the information, along with the release signed by the recipient or authorized representative, directly to the managed care program.

The managed care program makes most benefit payments and is entitled to any recovery that may be available. Refer to the Wisconsin Medicaid Web site at [www.dhfs.state.wi.us/medicaid/](http://www.dhfs.state.wi.us/medicaid/) for a complete listing of managed care programs.

### *A request involving estate recovery*

If the request involves a notice of intent to file a lien, amounts due to satisfy a recorded lien on real property (lien pay-off amount), transfers by affidavit, or probate claims for estate recovery, the provider is required to:

1. Obtain a release signed by the recipient or authorized representative.
2. Send a copy of the letter requesting the information, along with the release signed by the recipient or authorized representative, to:

Division of Health Care Financing  
Estate Recovery Program  
PO Box 309  
Madison WI 53701-0309

### *A request for an itemized statement from a dual entitlee*

Pursuant to s. 4311 of the Balanced Budget Act, a *dual entitlee* has the right to request and receive an itemized statement from his or her *Medicare*-certified health care provider. The Act requires the provider to furnish the requested information to the recipient. The Act *does not* require the provider to notify Wisconsin Medicaid.

**A** *dual entitlee* has the right to request and receive an itemized statement from his or her *Medicare*-certified health care provider.

#### **Additional information**

For more information about requests for billing information or medical claim records, write to:

Division of Health Care Financing  
Coordination of Benefits  
PO Box 309  
Madison WI 53701-0309 ✦

## What's new on the Medicaid and BadgerCare Web sites

The Wisconsin Medicaid and BadgerCare Web sites include provider and recipient publications, contacts and statistics, and eligibility and benefit information.

Providers may visit the Medicaid Web site at [www.dhfs.state.wi.us/medicaid/](http://www.dhfs.state.wi.us/medicaid/). The BadgerCare Web site is located at [www.dhfs.state.wi.us/badgercare/](http://www.dhfs.state.wi.us/badgercare/).

The following is a list of recently added information:

- April 2002 *Wisconsin Medicaid and BadgerCare Update*.
- Wisconsin Medicaid and BadgerCare federal poverty level guidelines.
- BadgerCare brochure in Hmong.

Keep in mind that if you do not have a computer with Internet access, many libraries have access available. ✦

## Medicaid Basic Training offered in May and June

Wisconsin Medicaid is conducting Medicaid Basic Training for *new* providers and *new* staff who need to increase their *basic* knowledge of the Medicaid program. Attendees will obtain general, all-provider information but will not receive service-specific billing and policy information. More experienced providers and staff should call Provider Services or their Professional Relations Representative with questions regarding the Medicaid program and with issues regarding specific claims. Registration is required; however, Wisconsin Medicaid does not charge a fee for attending.

#### **Medicaid Basic Training**

Medicaid Basic Training offers *new* providers and *new* staff the opportunity to increase their *basic* knowledge of the Medicaid program.

This training is not intended for experienced providers or staff. Medicaid Basic Training will be held at the times and locations listed in Attachment 1 of this *Wisconsin Medicaid and BadgerCare Update*.

Medicaid Basic Training is intended to supply new providers and new staff with general, all-provider information. The agenda, which is the same for all sessions, includes the following topics:

- Recipient eligibility and the Forward card.
- Other insurance codes.
- Medicare disclaimer codes and crossover claims.

- Claims submission and claims adjustments.
- Remittance and Status Reports.
- Health Insurance Portability and Accountability Act of 1996 (HIPAA) overview.

It is important that providers bring a paper copy of the All-Provider Handbook to the training. All certified providers have received a copy of this 335-page handbook. Providers who would like to receive an additional copy may either download and print it from the Medicaid Web site at [www.dhfs.state.wi.us/medicaid/](http://www.dhfs.state.wi.us/medicaid/), or contact Provider Services at (800) 947-9627 or (608) 221-9883 to purchase a copy.

Experienced providers and staff should call Provider Services or their Professional Relations Representative with questions regarding the Medicaid program and with issues regarding specific claims. Refer to the Provider Resources section of the All-Provider Handbook for information on when it is appropriate to use these various resources.

## Registration

Wisconsin Medicaid does not charge providers a fee to attend Medicaid Basic Training; however, providers who wish to attend need to register by the registration deadlines listed in Attachment 1. To register, complete the registration form in Attachment 2 and submit it either by fax or mail to Wisconsin Medicaid.

Fax submissions  
Attention: Training Coordinator  
(608) 221-0885

Mail submissions  
Training Coordinator  
Wisconsin Medicaid  
6406 Bridge Rd  
Madison WI 53784-0017

These basic training sessions focus on Medicaid fee-for-service policy and apply to providers of services to recipients on fee-for-service Medicaid only. For Medicaid HMO or managed care information, contact the appropriate managed care organization. Wisconsin Medicaid HMOs are required to provide at least the same benefits as those provided under fee-for-service arrangements.



**I**t is important that providers bring a paper copy of the All-Provider Handbook to the training.

The *Wisconsin Medicaid and BadgerCare Update* is the first source of program policy and billing information for providers.

Although the *Update* refers to Medicaid recipients, all information applies to BadgerCare recipients also.

Wisconsin Medicaid and BadgerCare are administered by the Division of Health Care Financing, Wisconsin Department of Health and Family Services, P.O. Box 309, Madison, WI 53701-0309.

For questions, call Provider Services at (800) 947-9627 or (608) 221-9883 or visit our Web site at [www.dhfs.state.wi.us/medicaid/](http://www.dhfs.state.wi.us/medicaid/).

# ATTACHMENT 1

## Medicaid Basic Training schedule

<b>Medicaid Basic Training</b>			
<b>Location</b>	<b>Date</b>	<b>Time</b>	<b>Registration deadline</b>
Sheraton Milwaukee Brookfield Hotel 375 S Moorland Rd Brookfield WI 53005 (262) 786-1100	May 14, 2002	9:00 a.m. - 11:30 a.m. or 1:00 p.m. - 3:30 p.m.	May 1
	May 15, 2002	9:00 a.m. - 11:30 a.m. or 1:00 p.m. - 3:30 p.m.	
Radisson 2040 Airport Dr Green Bay WI 54313 (920) 494-7300	May 21, 2002	9:00 a.m. - 11:30 a.m. or 1:00 p.m. - 3:30 p.m.	May 7
Comfort Inn 4822 E Washington Ave Madison WI 53704 (608) 244-6265	June 4, 2002	9:00 a.m. - 11:30 a.m. or 1:00 p.m. - 3:30 p.m.	May 21
Best Western Midway Hotel 1835 Rose St La Crosse WI 54603 (608) 781-7000	June 6, 2002	9:00 a.m. - 11:30 a.m.	May 23

# ATTACHMENT 2

## Medicaid Basic Training registration form

(The registration form is located on the following page.)

# 2002 Medicaid Basic Training

## Agenda

- ✓ Understanding basic Medicaid procedures for all providers.
- ✓ You and your All-Provider Handbook.
  - Eligibility/Forward Card.
  - Other insurance (OI) codes.
  - Medicare disclaimer codes/cross-over claims.
  - General claims submission/adjustments.
  - Remittance and Status (R/S) Reports.
- ✓ Basic claims information.
- ✓ Health Insurance Portability and Accountability Act of 1996 (HIPAA) overview.
- ✓ Meet your Rep.

## Who should attend

This training is intended for new providers or new billing staff who need to increase their BASIC knowledge of the Medicaid program. This training will not include service-specific billing and policy information.

## What to bring

Please bring your All-Provider Handbook to the training. For an additional copy, please contact Provider Services or refer to the Medicaid Web site at [www.dhfs.state.wi.us/medicaid/](http://www.dhfs.state.wi.us/medicaid/).

## How to register

You may either fax or mail this registration form to:

Fax — Attention: Training Coordinator, (608) 221-0885

Mail — Attention: Training Coordinator  
 Wisconsin Medicaid  
 6406 Bridge Rd  
 Madison WI 53784-0017

## Medicaid Basic Training registration

Indicate which training session you will attend (check one):

Location	Date and Time	Register by
<b>Sheraton Milwaukee                      Brookfield Hotel</b> 375 S Moorland Rd Brookfield WI 53005 (262) 786-1100	<b>May 14, 2002</b> <input type="checkbox"/> (9:00 a.m. - 11:30 a.m.) <input type="checkbox"/> (1:00 p.m. - 3:30 p.m.)	<b>May 1</b>
	<b>May 15, 2002</b> <input type="checkbox"/> (9:00 a.m. - 11:30 a.m.) <input type="checkbox"/> (1:00 p.m. - 3:30 p.m.)	
<b>Radisson</b> 2040 Airport Dr Green Bay WI 54313 (920) 494-7300	<b>May 21, 2002</b> <input type="checkbox"/> (9:00 a.m. - 11:30 a.m.) <input type="checkbox"/> (1:00 p.m. - 3:30 p.m.)	<b>May 7</b>
<b>Comfort Inn</b> 4822 E Washington Ave Madison WI 53704 (608) 244-6265	<b>June 4, 2002</b> <input type="checkbox"/> (9:00 a.m. - 11:30 a.m.) <input type="checkbox"/> (1:00 p.m. - 3:30 p.m.)	<b>May 21</b>
<b>Best Western Midway                      Hotel</b> 1835 Rose St La Crosse WI 54603 (608) 781-7000	<b>June 6, 2002</b> <input type="checkbox"/> (9:00 a.m. - 11:30 a.m.)	<b>May 23</b>

## Registration

Name \_\_\_\_\_

Specialty \_\_\_\_\_

Telephone number \_\_\_\_\_

What is your present level of Medicaid experience? \_\_\_\_\_

\_\_\_\_\_