Thom Biller Upgrade
Version v20.02b

This upgrade assumes you are at least on version 19.12a. If not, please run it first.

If your IT staff are going to run your upgrade, make sure you give them a copy of this document and the email that was sent with the upgrade notice. Once the IT staff has completed the basic installation, please be sure to run any additional steps within Thom Biller that may be needed.

Note, you can use Windows 10 machines for the installation.

Additional Steps Needed Before Install: none.

Data File Changes: substantial changes to billing claim and remit tables. These are generally hidden from the user but the upgrade may take a while.

Additional Steps Needed After Install: none

Contact Information:

Please call email me, Larry Tucker, at ltucker@thomchild.org if you have any questions. Also remember to check the Thom website for updates and news:

www.thomchild.org/thom-biller/thom-biller-updates

There is also a current copy of the User's Guide and "Generally Useful Documentation" such as instructions for adding a new workstation.

Installation Instructions:

Windows 10 machines can be used to run the upgrade. If you are on a network, and have run the previous upgrades, *then you only have to run this upgrade on a single workstation*. The updates will automatically propagate to all other machines running Thom Biller on the network.

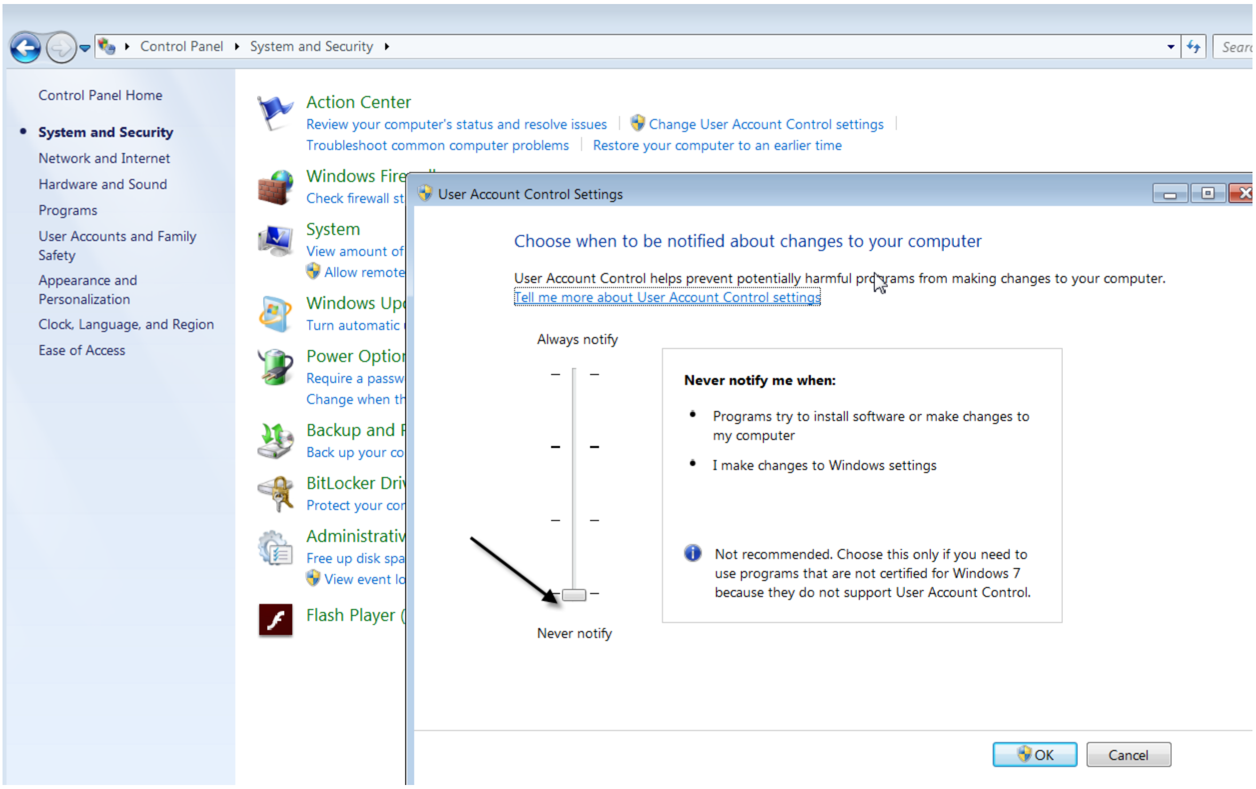
1. Make sure you have backed up your data. *If your backup run automatically at night, it is best to run the upgrade first thing in the morning so you won't lose any work if you have to revert to the backup.*

2. Make sure no one else is using the Thom Biller software on the network and that it is not running on your computer (in a minimized window on your taskbar.)

3. For Base – Off site systems, make sure you complete any billing disk and recovery exchanges that may be in process. Both the Base and the Off-site systems must be on the same version of Thom Biller during a billing exchange. If one “side” upgrades before the other, then the off-site disk recovery will be disallowed. So, if you are currently downloading disks, or waiting to recover a download disk, do not run the upgrade until both the download and recovery processes are complete.

4. For network users, pick a single workstation that you will use for upgrades. Windows 7 or Windows 10 machines should work fine. Try to run the upgrade on this machine this time, and all future upgrades on the same machine because it may take some special configuration of UAC (#5) and dlls (#8).

5. Make sure User Account Control "UAC" is turned off ("Never Notify").

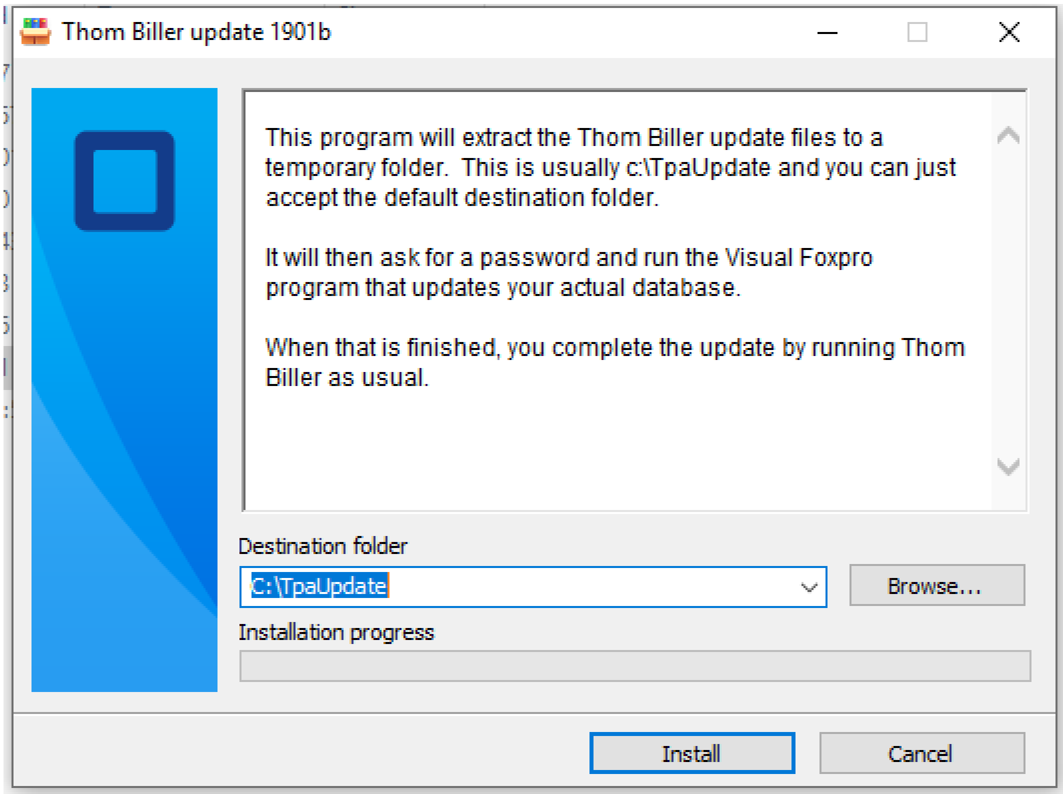


Any other setting will prevent the upgrade program from copying files. If the UAC is not off, pull the slider down and restart the computer. You must restart in order for the new UAC setting to take effect.

6. Run the upgrade executable from the web site:

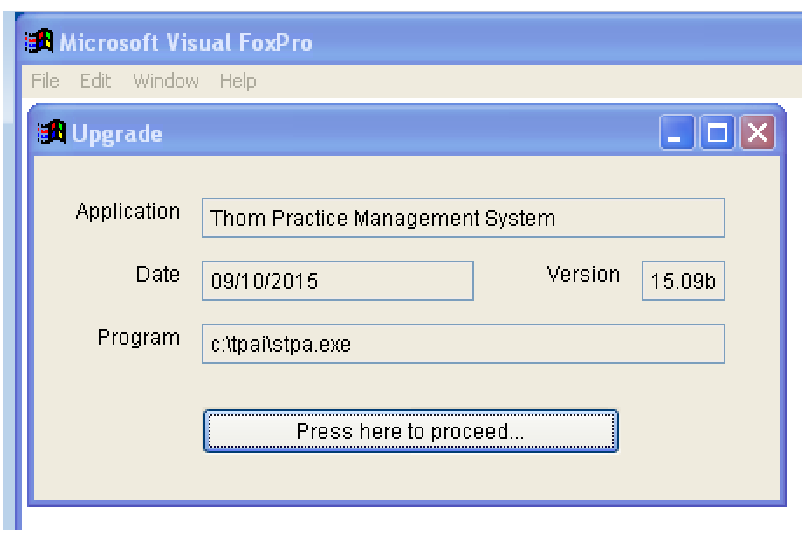
(www.thomchild.org/thombillerupdates.htm)

7. A WinRar screen will start up.



Accept all the default choices and enter the password.

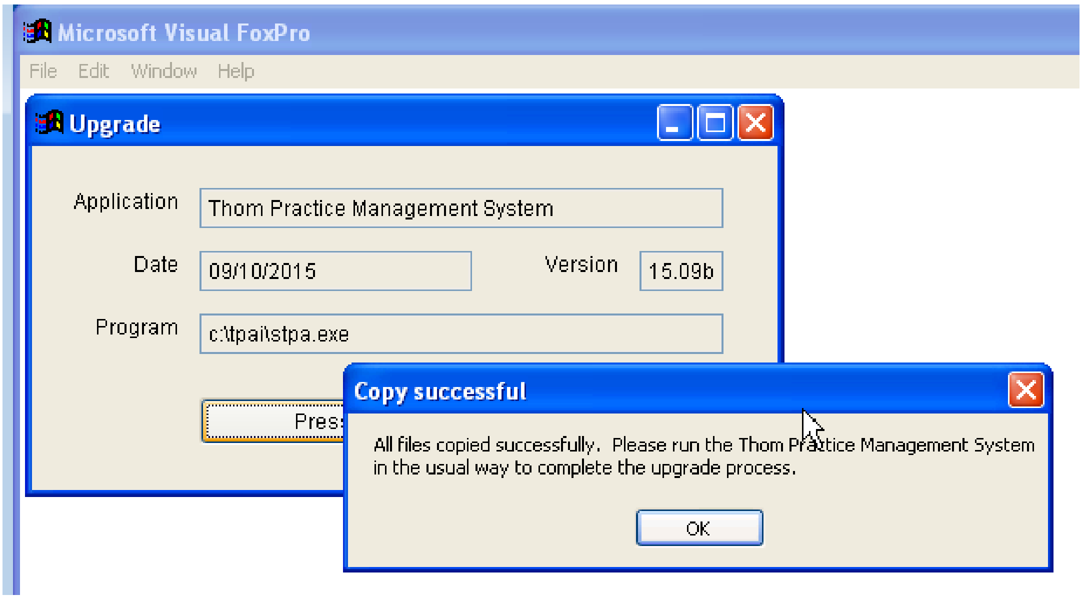
8. A FoxPro window will open to complete the upgrade (below). Press the "Proceed..." button to do this.



If this FoxPro "Upgrade" window does not appear, it means this computer does not have a dll in the correct location. Locate the msvcr71.dll (probably on your c:\ root folder) and copy it to your

Windows\SysWow64 folder for 64-bit machines.   (For 32-bit Win 7, copy the msvcr71.dll to your Windows\System32 folder).   If you need to make this change, restart the computer and re-try the upgrade.

Assuming the Foxpro Upgrade routine runs, it will locate your data wherever it is on the network and upgrade it. It will tell you whether all files copied successfully or not (below):



If files do not copy correctly, it is usually because the UAC setting (#4) is incorrrect.

9. Start the Thom Biller software as usual. This will complete the upgrade and set the title bar version. (If you get a warning that data changes are needed and someone else is running the program, please make sure everyone is logged off and try running Thom Biller again.) This step may bring over a new version of the loader program and ask you to restart Thom Biller. It may also bring over a new version of VFPSetup and automatically run it as well.

For network users, DO NOT run the upgrade on every machine. Running it once on the machine you have chosen for upgrades will be enough to send the upgrade to all other workstations the next time they start the Thom Biller.

Problems downloading or running the upgrade file

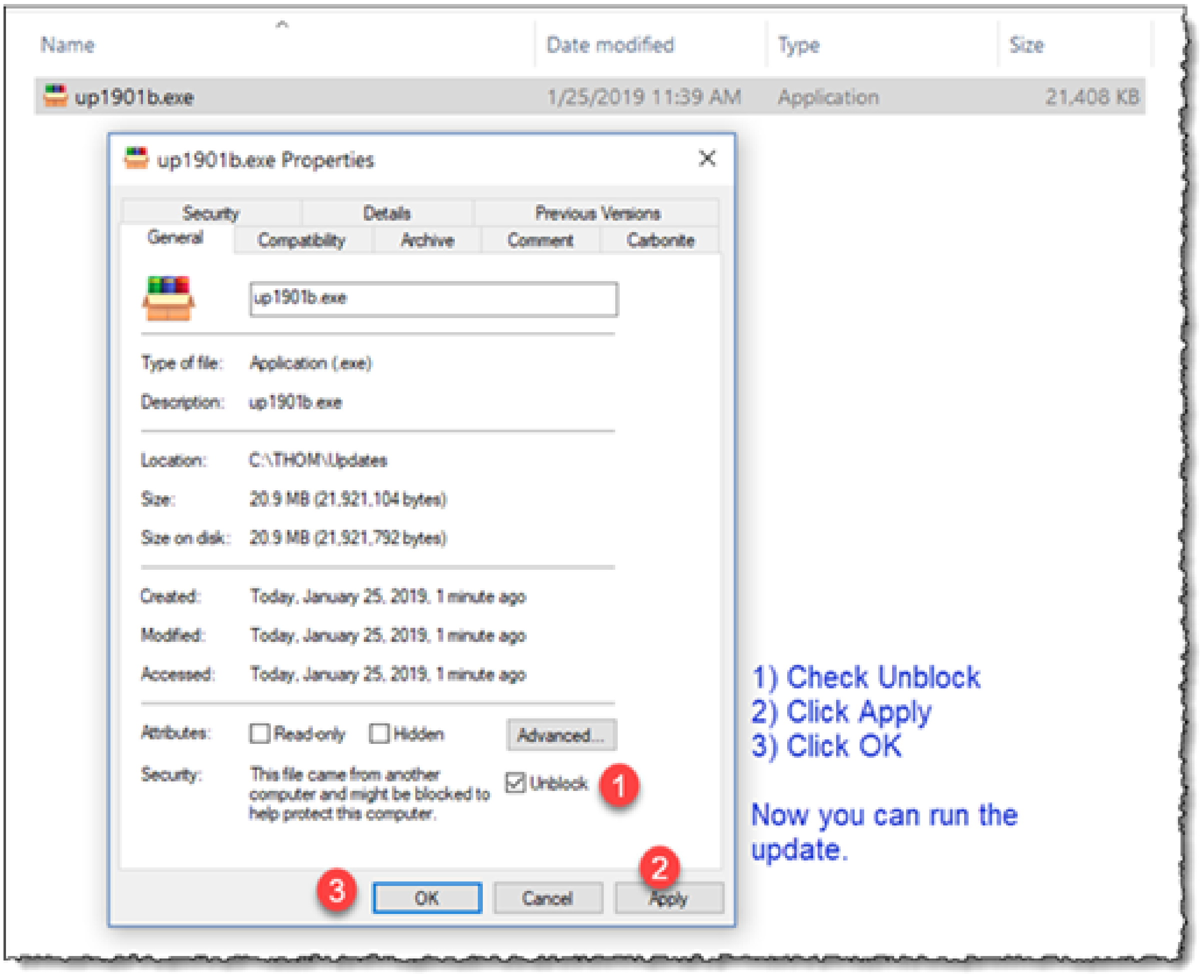
If you get a Windows error, such as “Error: Windows cannot access the specified device, path, or file. You may not have the appropriate permission to access the item” see the following:

1) Make sure your anti-virus software is stopped temporarily and not interfering.

2) Save the file to a local (not network) folder, such as c:\temp, that you know you have full permissions to.

3) Look at the file properties and “Unblock”.

1. Right click the file and select "Properties", then click the "Unblock" checkbox at the "Security" section.
2. Click "Apply"
3. Click "OK"



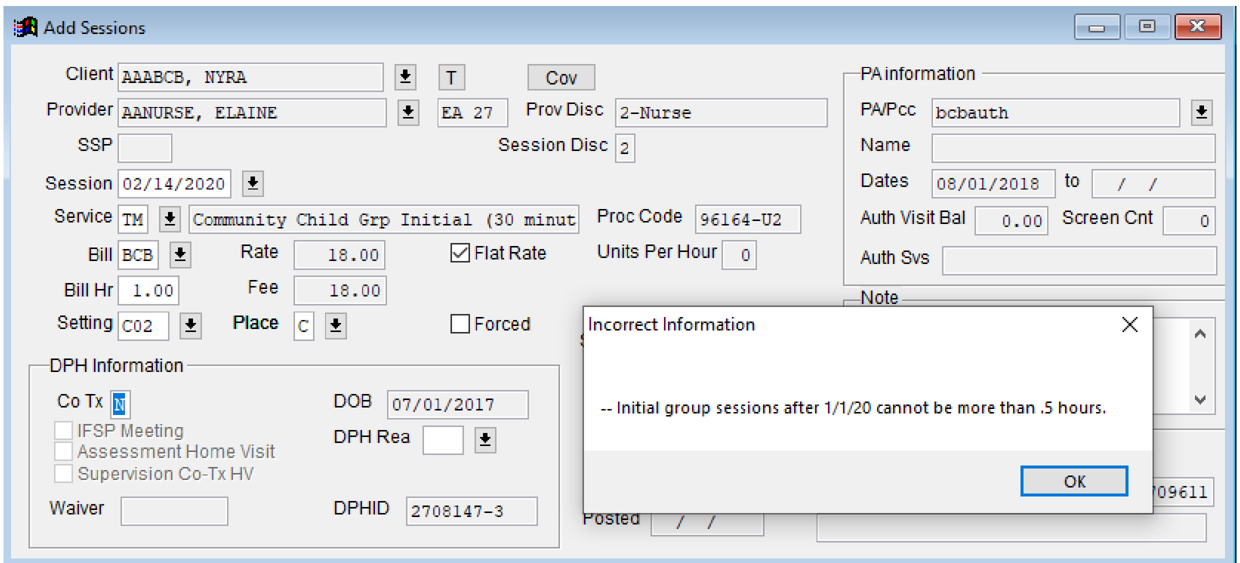
For more discussion of problems with Windows reading a downloaded file, see this link:

https://support.microsoft.com/en-us/help/2669244/windows-cannot-access-the-specified-device-path-or-file-error-when-you

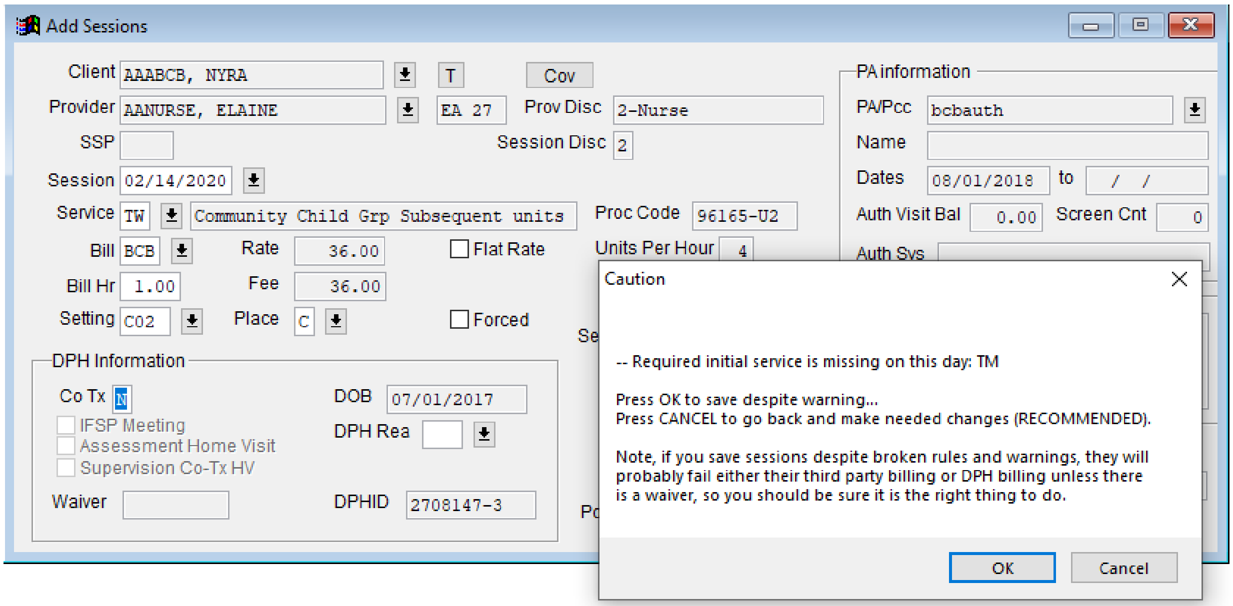
Upgrade Details
V20.02b

Initial and Subsequent Group Services

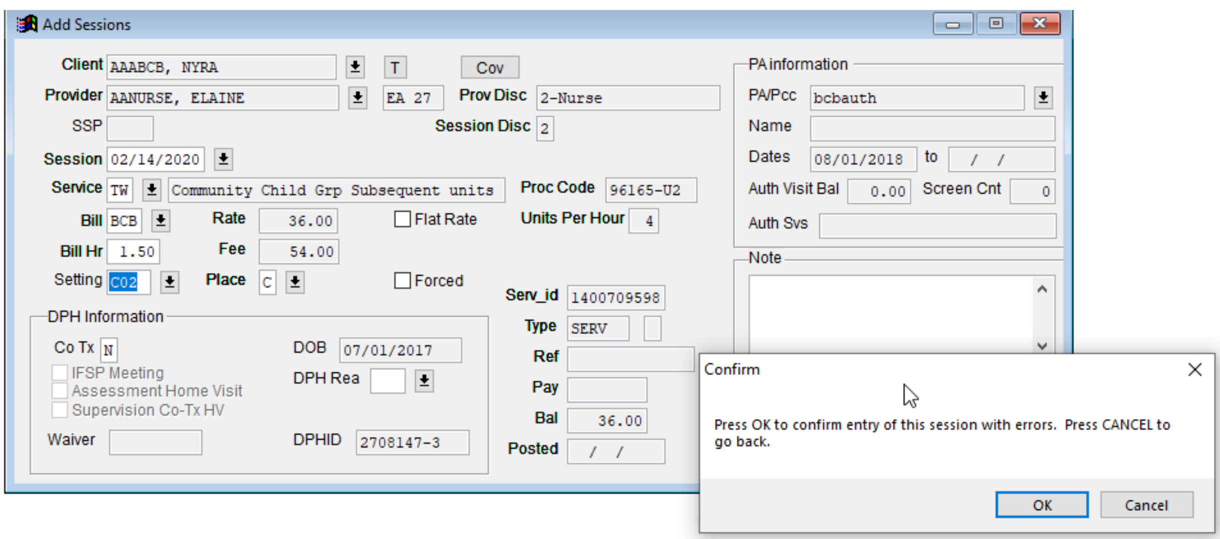
More than .5 hours will no longer be allowed for initial group sessions (before it just generated a warning). You must now go back and change it in order to save a record (below):



When you get any “Caution” or warning during session entry, there is more information in the warning message and if you go ahead and try to save the session despite the warning, you’ll get a second confirmation message just to make sure. You should seldom save sessions that have warnings and then only when you have a good reason (below):



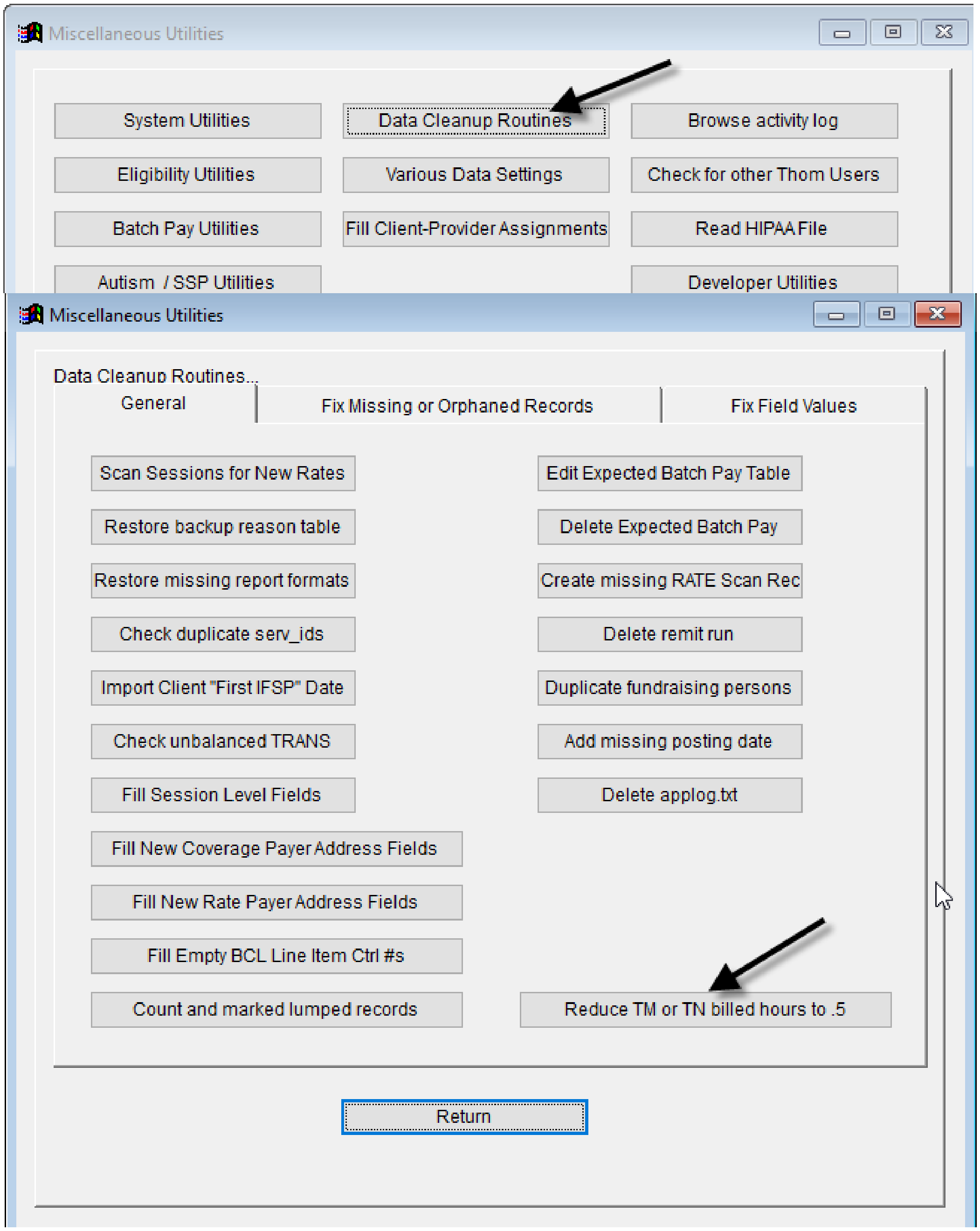
You may want to save this if you know the proper TM Initial Group will be entered later, but that is the only reason to do so.



Initial Group Service Excess Hour Repair

If you have accidentally entered more than .5 hours for initial groups, you'll need to do the following steps. If not, skip to the next section.

For stand alone systems, run this at your main office. For base/off-site systems, run it at <u>both</u> the base and off-site locations.


Miscellaneous Utilities
System Utilities
Data Cleanup Routines
Browse activity log
Eligibility Utilities
Various Data Settings
Check for other Thom Users
Batch Pay Utilities
Fill Client-Provider Assignments
Read HIPAA File
Autism / SSP Utilities
Developer Utilities
Miscellaneous Utilities
Data Cleanup Routines...
General
Fix Missing or Orphaned Records
Fix Field Values
Scan Sessions for New Rates
Edit Expected Batch Pay Table
Restore backup reason table
Delete Expected Batch Pay
Restore missing report formats
Create missing RATE Scan Rec
Check duplicate serv_ids
Delete remit run
Import Client "First IFSP" Date
Duplicate fundraising persons
Check unbalanced TRANS
Add missing posting date
Fill Session Level Fields
Delete applog.txt
Fill New Coverage Payer Address Fields
Fill New Rate Payer Address Fields
Fill Empty BCL Line Item Ctrl #s
Count and marked lumped records
Reduce TM or TN billed hours to .5
Return

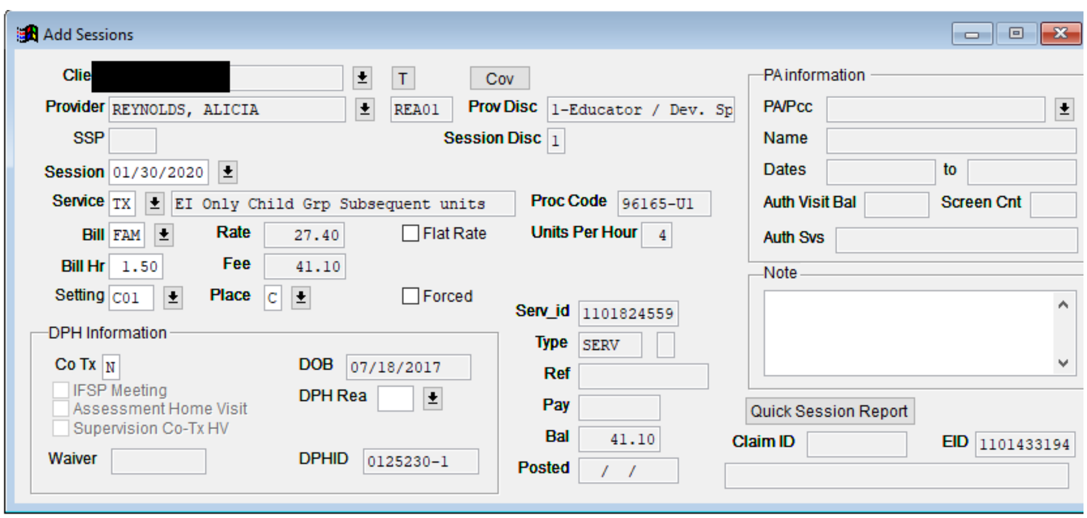
Print the TM and TN scan report in full:

```
02/09/2020                                      Basic Events by Client                                    Page      1
                                        Reduced billed hours for TM and TN Services

Pr  Dphid-Ref  Session   Sv      Prov     Bl.Hr.  Bill   Fee              Pay  Type       Ref        Resub     Bal     Posted
    SSP        Serv_id   Place   Disc     SSP     Sec    Proc                  IFSP              SDR Resub  Reason   Billed
    Setting    Eid       Forced  Coverage               Auth              Waiver          TCN                         Sdr
    Note                                                                                                              Entered
------------------------------------------------------------------------------------------------------------------------

** Client: [redacted]
01  0125488-1  01/03/2020 TN     PRC01     0.50  OTM     13.70           0.00 SERV                          13.70  01/16/2020
               1101818043 C      1                      96164                                                      01/16/2020
    C01        1101426677        N0138427201                                                                        /  /
    TM scan reduced old billed hour from: 2                                                                        01/03/2020

01  0125488-1  01/10/2020 TN     DEA01     0.50  OTM     13.70           0.00 SERV                          13.70  01/16/2020
               1101819014 C      C                      96164                                                      01/16/2020
    C01        1101427649        N0138427201                                                                        /  /
    TM scan reduced old billed hour from: 2                                                                        01/14/2020

** Client Subtotal **

                                           1.00          27.40           0.00                          27.40
```

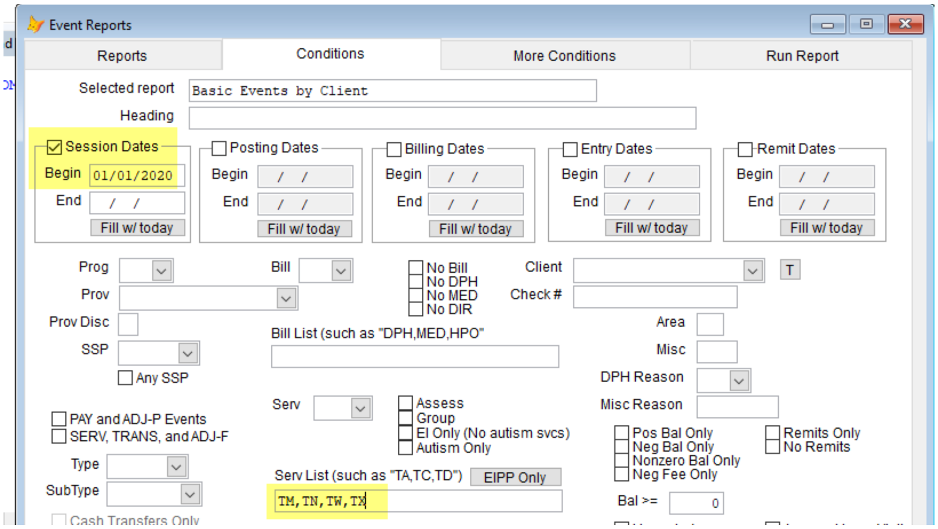
You will use this report to enter the needed subsequent sessions by hand. (For base/offsite systems, the session entry will be done at the offsite location as usual). In this example, enter TX Subsequent EI only group sessions for 1.5 hours to bring the total up to 2 hours (for what started as a TN Initial EI only group session.

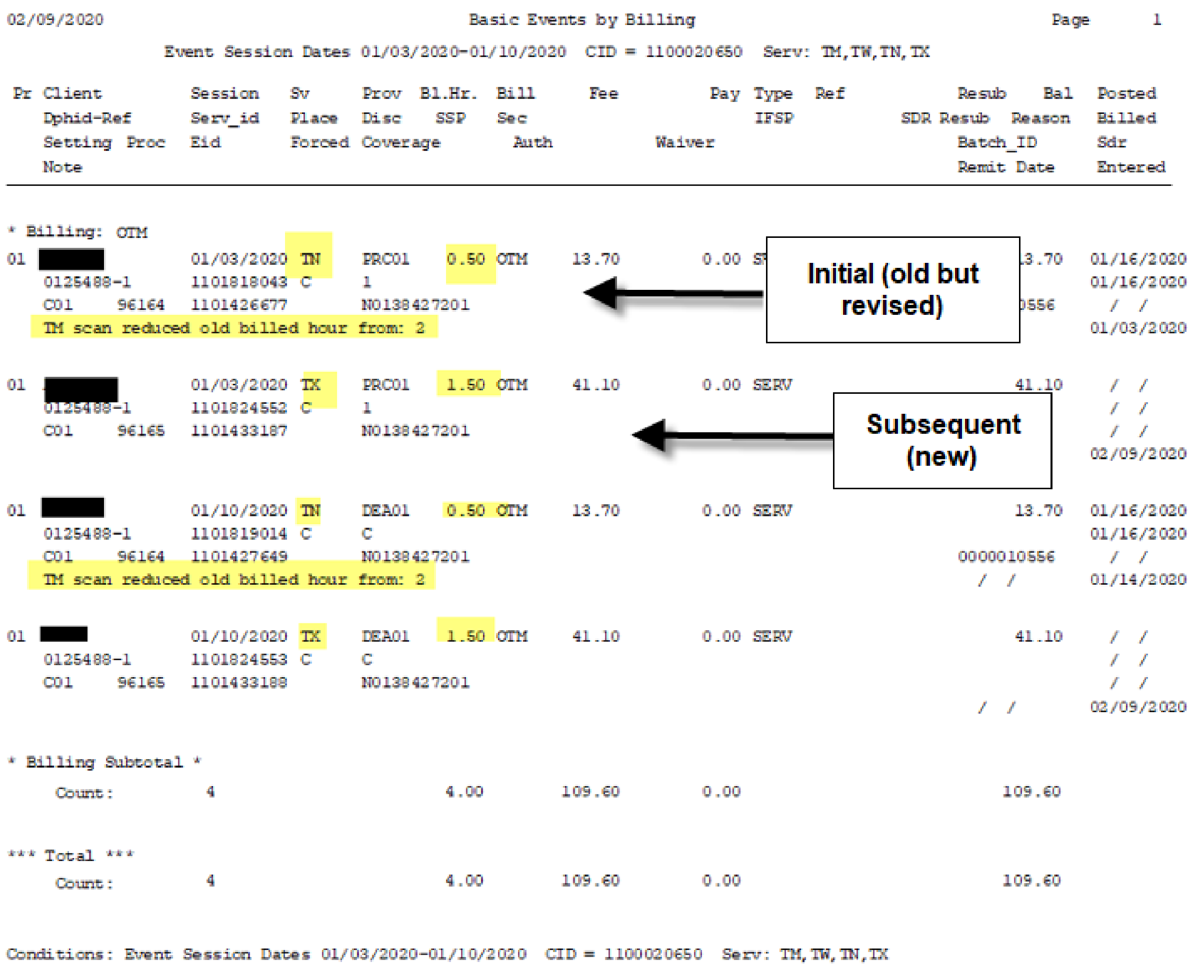
Remember:

TM -> TW (Initial and subsequent Community Group)
TN ->TX (Initial and Subsquent EI Only Group)



If you run a report for TM, TN, TW, TX sessions since 1/1/20, you'll see both the revised and newly entered sessions as follows:





02/09/2020 Basic Events by Billing Page 1

Event Session Dates 01/03/2020-01/10/2020 CID = 1100020650 Serv: TM,TW,TN,TX

Pr Client Session Sv Prov Bl.Hr. Bill Fee Pay Type Ref Resub Bal Posted
Dphid-Ref Serv_id Place Disc SSP Sec IFSP SDR Resub Reason Billed
Setting Proc Eid Forced Coverage Auth Waiver Batch_ID Sdr
Note Remit Date Entered

* Billing: OTM

01 [redacted] 01/03/2020 TN PRC01 0.50 OTM 13.70 0.00 S 13.70 01/16/2020
0125488-1 1101818043 C 1 01/16/2020
C01 96164 1101426677 N0138427201 0556 / /
TM scan reduced old billed hour from: 2 01/03/2020

Initial (old but revised)

01 [redacted] 01/03/2020 TX PRC01 1.50 OTM 41.10 0.00 SERV 41.10 / /
0125488-1 1101824552 C 1 / /
C01 96165 1101433187 N0138427201 / /
02/09/2020

Subsequent (new)

01 [redacted] 01/10/2020 TN DEA01 0.50 OTM 13.70 0.00 SERV 13.70 01/16/2020
0125488-1 1101819014 C C 01/16/2020
C01 96164 1101427649 N0138427201 0000010556 / /
TM scan reduced old billed hour from: 2 / / 01/14/2020

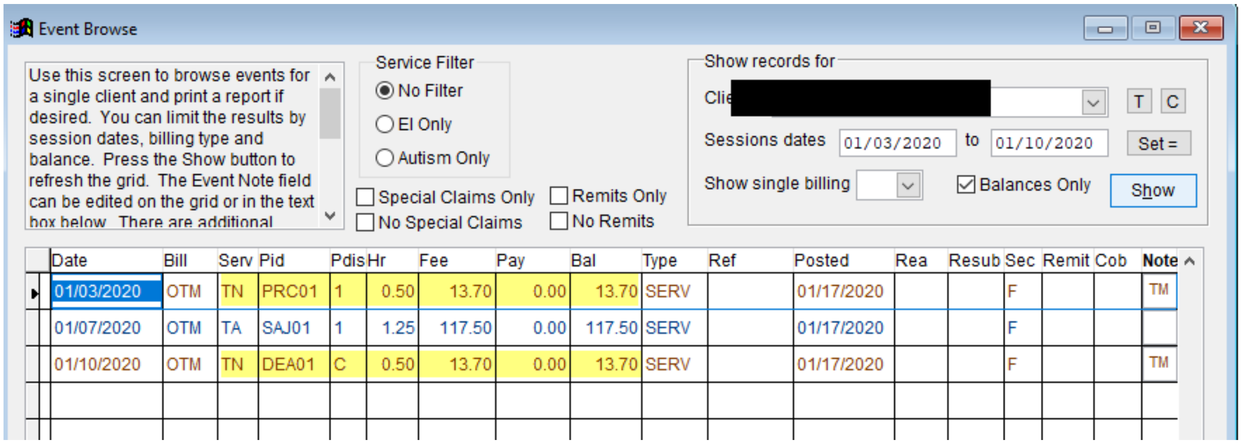
01 [redacted] 01/10/2020 TX DEA01 1.50 OTM 41.10 0.00 SERV 41.10 / /
0125488-1 1101824553 C C / /
C01 96165 1101433188 N0138427201 / /
/ / 02/09/2020

* Billing Subtotal *
Count: 4 4.00 109.60 0.00 109.60

*** Total ***
Count: 4 4.00 109.60 0.00 109.60

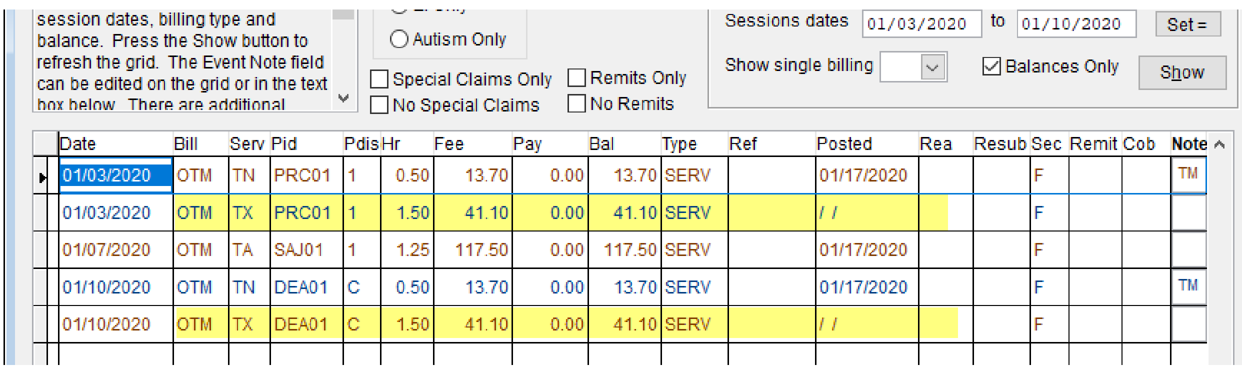
Conditions: Event Session Dates 01/03/2020-01/10/2020 CID = 1100020650 Serv: TM,TW,TN,TX

For base/off-site programs, after the scan you'll see only the reduced hours (below). Note that the scan changed the billed hours on posted records, which you would think violates a basic business rule. But, in this case, because it was a flat rate service, the payers never saw the excess hours. They just saw 1 unit of the initial service and a low fee that was correct for 1 unit:



You may also see some transfers that were affected. Again, the scan changed all the hours to either +.5 or -.5.

After downloading the new subsequent sessions entered by billing staff, you'll see them as well (in yellow below) and the combination of the reduced + new claims should add up to the original billed hours (which should match the clinical log).



These new sessions will go out as new sessions on the next third-party billing run as usual; they are simply new sessions that are unposted. They will not be rejected as duplicates since they will have different procedure codes.

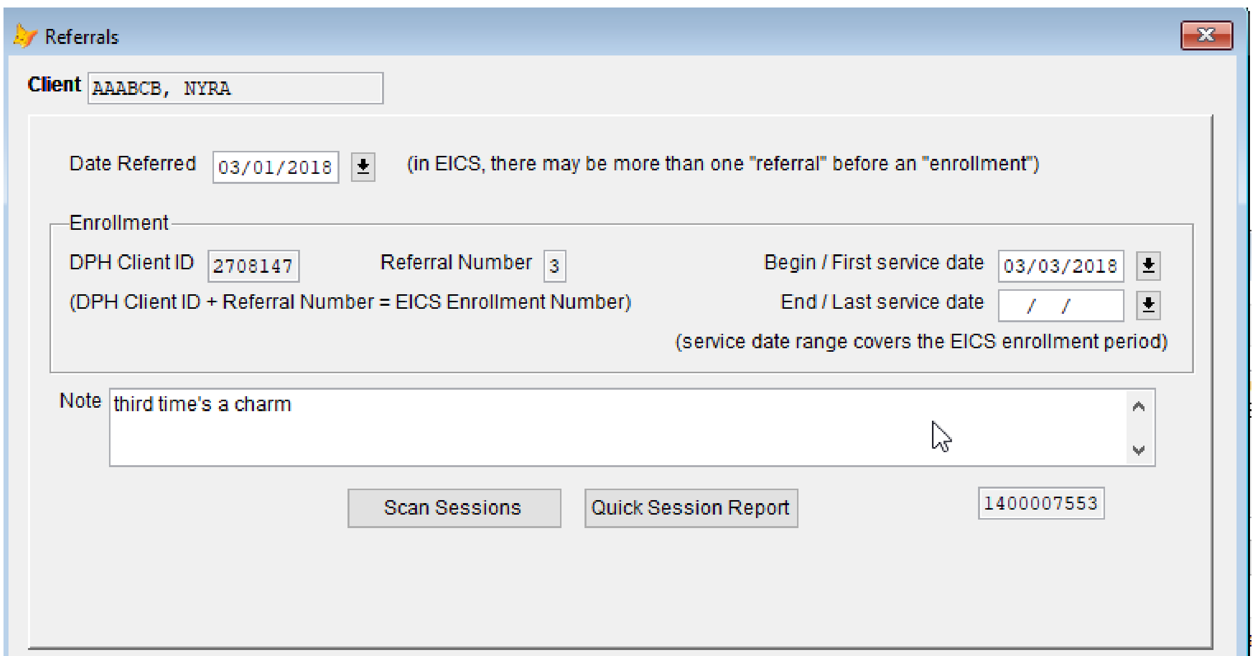
As for DPH, you should have removed the initial group sessions (because of the hour incompatibility) and marked them for SDR resubmission, so they will go out on the next SDR. The new subsequent sessions automatically go to DPH after being posted.

Client Referral Screen changes

The new EICS system uses the term "enrollment" the way we used to use the term "referral". In EICS, a "referral" is literally when someone calls to tell you about the child and there may be several referral communications before an "enrollment" occurs. In EICS, the enrollment process is what creates the "enrollment number", which in Thom Biller is a combination of the DPHID and Referral Number. EICS doesn't appear to have a term for the sequential "numeric" part of their Enrollment Number.

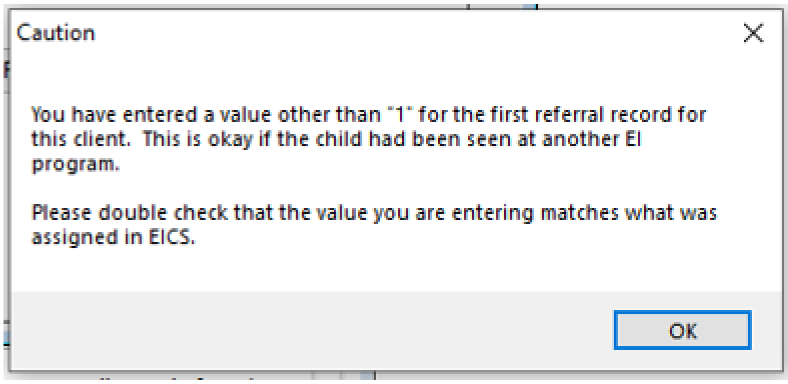
On the Thom Biller "Referral" page, I moved the old referral date up and away from the more important "enrollment" information. The Referral Date is not used for any important purpose in Thom Biller.

What really matters is what is now within the "Enrollment" box on the form. The Begin and End dates (now called "Begin / First Service Date" and "End / Last Service Date" are important just like they always were: they determine whether this particular DPHID and Referral Number ("EICS Enrollment Number") will be stamped on a particular session.

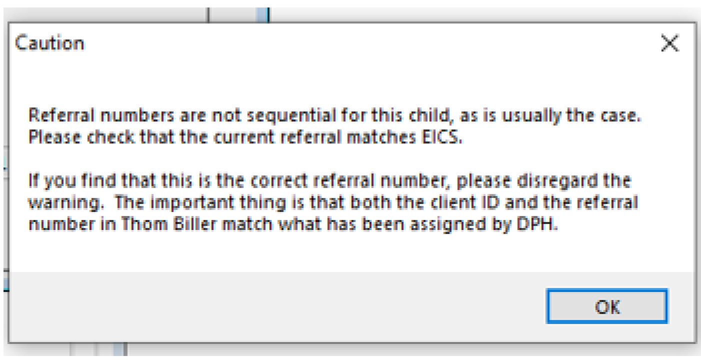


The DPH Client ID and Referral Number in Thom Biller must match the "Enrollment number" in EICS. Note that neither the Client ID nor the referral number have anything to do with your particular program in the new EICS. The Client ID is meant to be unique for the child and will stay with him or her no matter what EI program works with the child. Similarly, the numeric part ("referral number") will be incremented each time a child enrolls in any EI program. So, if you see Johnny first, then he goes to another program, then comes back to yours, he will have a "3" for the referral number part of his Enrollment Number in EICS.

Of course, for most children, the first time you see the child is the first time they have enrolled, so Thom Biller still checks that you are assigning a "1" when you create your first Referral record. However, this is not necessarily correct, so the caution message will simply ask you to double check that you entered the right value based on what EICS assigned (below):

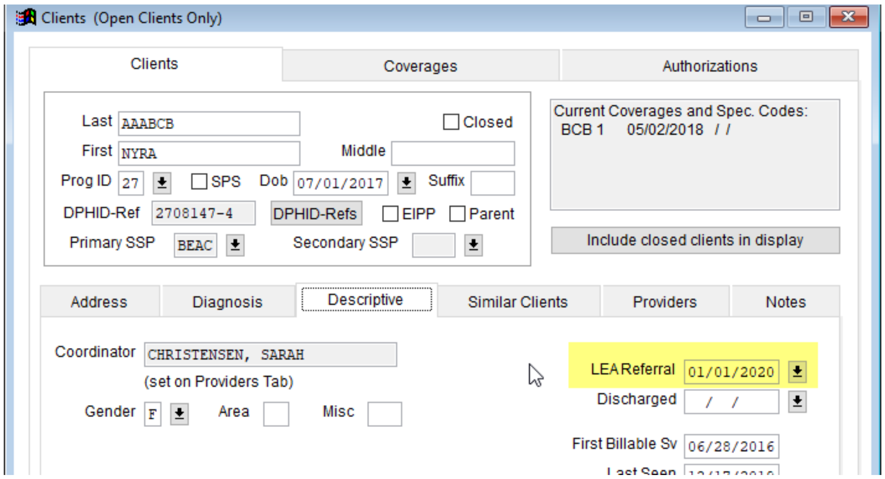


Similarly, for returning children, most return to the same program where they were previously seen, so again Thom Biller will look for sequential referral numbers and you'll get a caution message if yours are not sequential (below):

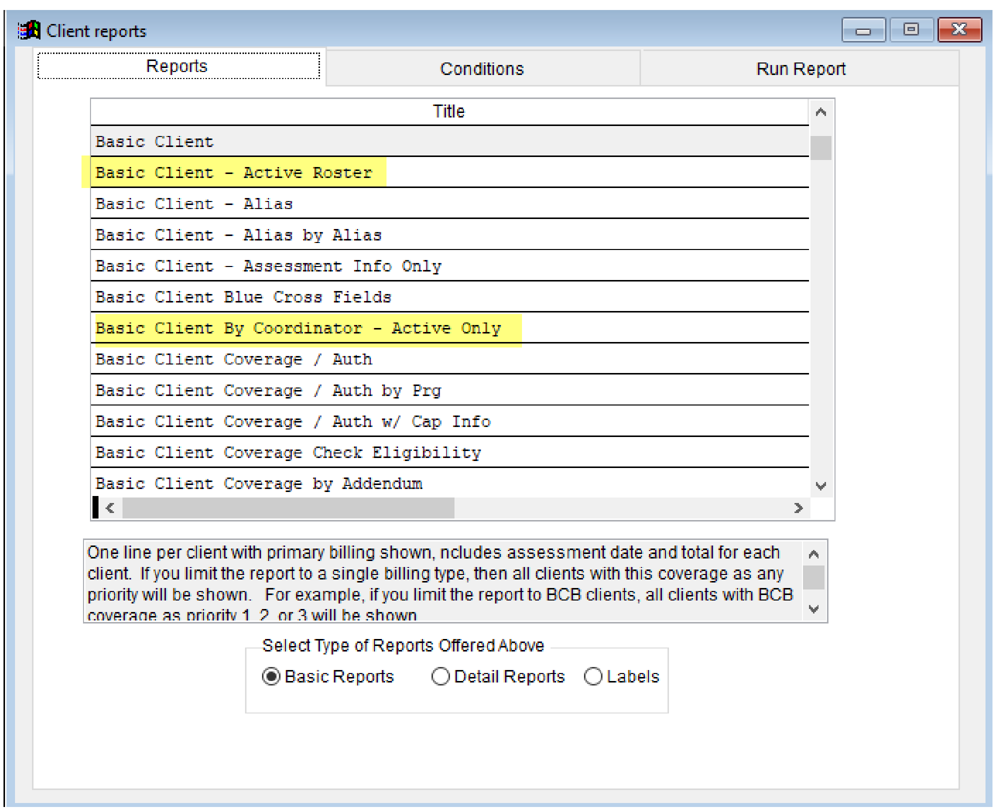


Again, your referral number will probably be sequential for 90% of your children, but not all. The important thing is that you double check that what you are entering in Thom Biller matches what EICS has assigned. These truly are "Caution" messages, not "ERROR" messages.

New LEA Referral date for Clients:



Two new reports were added for “Active” (not discharged) clients:



The Basic Client – Active Roster shows basic identifying information for all clients not discharged:

01/08/2020 Active Client Roster (Not Discharged) Page: 1

Client Not Closed

Client Prog DPHID	DOB Referred	Guardian Address	Phone	Coordinator
AAABCB,NYRA 27 2708147-4	07/01/2017 12/16/2019	[redacted] DAL & VISHAL OR RIDGE MA 01581	[redacted] 72-1816	[redacted] N, SARAH
AAABCBEIONLY,ANANYA 27 2701new-3	07/07/2017 12/15/2019	[redacted] KE ROAD 412 A 01581	[redacted] 79-1717	[redacted] TOLI), KRISTA

The Active Clients By Coordinator shows current clients not discharged and important dates for case management purposes. It is sorted by coordinator and also shows the supervisor or team, if assigned for the coordinator.

01/08/2020 Active Clients By Coordinator (Not Discharged) Page: 2

Client Not Closed

Coordinator: AASPEECH, MARIA Supervisor / Team:

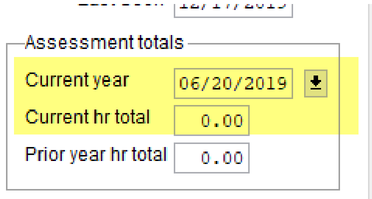
Client Prog DPHID	DOB Referred	Last Eval Hours Used To Report Date	6-month Review	Next Eval	Referral to LEA Due	Referred to LEA	TPC Between
[redacted], THIAGO 2707728-1	03/08/2014 06/22/2015	07/21/2019 0.00	01/21/2020	07/21/2020	12/08/2016	01/01/2020	06/08/2016 - 12/08/2016
[redacted] BENJAMIN 2707607-1	04/30/2014 03/27/2015	06/02/2019 0.00	12/02/2019	06/02/2020	01/30/2017	/ /	07/30/2016 - 01/30/2017
[redacted] ER, ANNEKE 2707903-1	08/11/2014 11/18/2015	12/17/2019 0.00	06/17/2020	12/17/2020	05/11/2017	/ /	11/11/2016 - 05/11/2017
[redacted] S, VALERIA 2707713-1	11/13/2014 06/10/2015	06/30/2019 0.00	12/30/2019	06/30/2020	08/13/2017	/ /	02/13/2017 - 08/13/2017
[redacted] DA LOPEZ, 2707629-2	07/08/2014 07/18/2016	08/08/2019 0.00	02/08/2020	08/08/2020	04/08/2017	/ /	10/08/2016 - 04/08/2017

Count: 5

The New Referred to LEA date shows as indicated.

The old Referred Date from the Referral record is on the left under the DOB.

The "Last Evaluation date and Hours Used are from the client Assessment Current Year and Hr totals:



The 6-month review is calculated from the last evaluation date, plus 6 months.

The next eval date is calculated as 1 year from the last evaluation.

The referral to LEA is calculated 2 years + 9 months from the child's birthday.

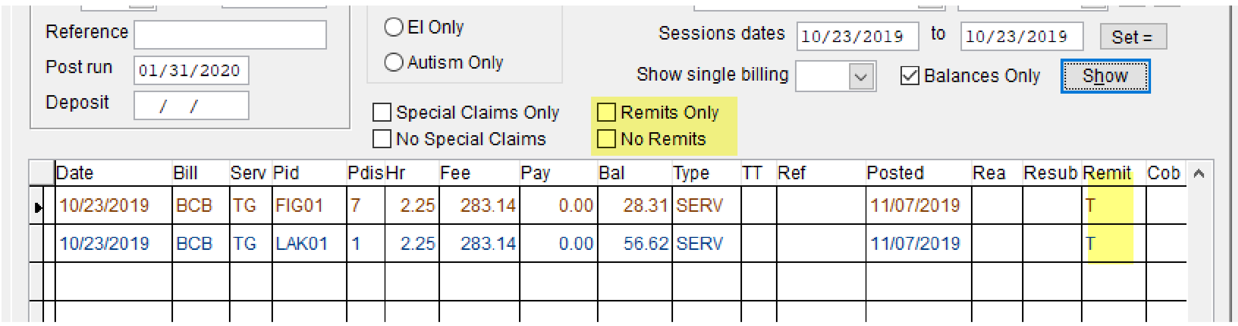
The Referred to LEA is the new field entered on the client record when the child is actually referred.

The TPC Between date range calculated as 2 years + 3 months to 2 years + 9 months from the child's birthday. (It's end date is the same as the Referral to LEA due date.)

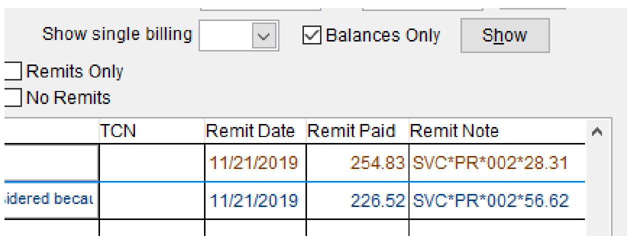
Remittance Information in PTA and Reports

To help track which claims have electronic 835 remittance information, this is now shown in the PTA (and Event Browse screens) as well as several reports.

On the PTA (and Event Browse screens), the “Remit” column will have a “T” for “True” if 835 remittance information has been applied to it:



Panning to the right, you can see additional remit fields: the date, amount paid, and adjustment note (below).



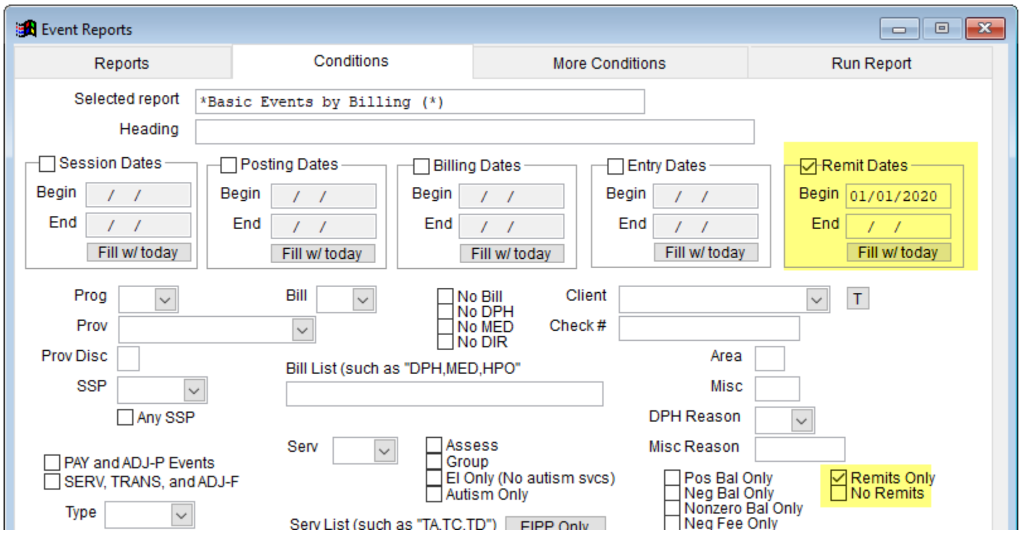
Note, you can limit the “Show” display of records to those with Remits Only or No Remits by the checkboxes at the top. (The Event Browse has similar columns and controls).

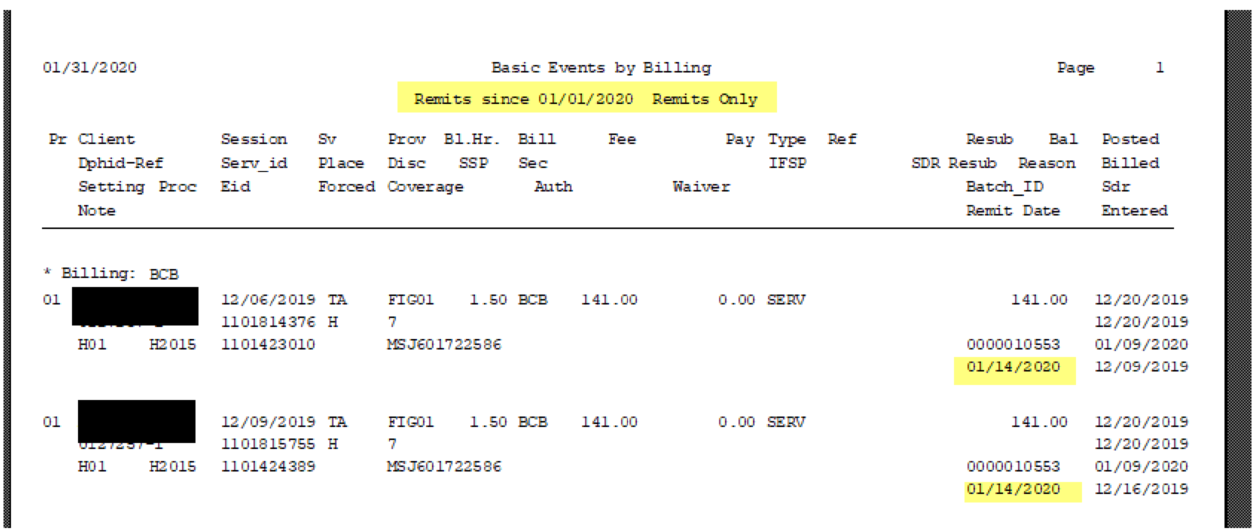
For reports, six Basic Event reports have at least the Remit Date shown and are also responsive to the same “Remits Only” vs. “No Remits” conditions:

For example, Basic Event by Billing has the Remit Date field added (below).

```
01/31/2020                         Basic Events by Billing                        Page      1
                                        Remits Only

 Pr Client          Session    Sv      Prov  Bl.Hr.  Bill     Fee          Pay  Type  Ref          Resub    Bal   Posted
    Dphid-Ref       Serv_id    Place   Disc    SSP   Sec                        IFSP            SDR Resub  Reason  Billed
    Setting  Proc   Eid        Forced  Coverage       Auth           Waiver                         Batch_ID        Sdr
    Note                                                                                            Remit Date      Entered
-----------------------------------------------------------------------------------------------------------------------------

* Billing:  BCB
01 [redacted]       10/11/2019 TG      CKE01    1.25 BCB    157.30         0.00 SERV                      -141.57  10/17/2019
    0127257-1       1101804829 H       1                                                                           10/17/2019
    S02      T1024  1101413463         MSJ601722586                                                 0000010545     11/08/2019
                                                                                                    11/05/2019     10/15/2019

01 [redacted]NRY    10/23/2019 TG      FIG01    2.25 BCB    283.14         0.00 SERV                        28.31  11/07/2019
    [redacted]1     1101806898 H       7                                                                           11/07/2019
    S02      T1024  1101415532         MSJ601722586                                                 0000010548     11/08/2019
                                                                                                    11/21/2019     10/29/2019
```

It can also be used with the remittance conditions on the Conditions Tab: Remit date range, "Remits Only" or "No Remits" (below). For example, use the remit date range to see records with recently run remits (below):





```
01/31/2020                          Basic Events by Billing                              Page      1
                                 Remits since 01/01/2020  Remits Only

Pr Client        Session    Sv     Prov  Bl.Hr.  Bill      Fee        Pay  Type  Ref          Resub    Bal   Posted
   Dphid-Ref     Serv_id    Place  Disc    SSP   Sec                       IFSP          SDR Resub  Reason  Billed
   Setting  Proc Eid        Forced Coverage       Auth           Waiver                       Batch_ID        Sdr
   Note                                                                                       Remit Date      Entered

* Billing:  BCB
01 [redacted]    12/06/2019 TA     FIG01   1.50  BCB    141.00        0.00  SERV                   141.00  12/20/2019
                 1101814376 H      7                                                                       12/20/2019
   H01    H2015  1101423010        MSJ601722586                                             0000010553     01/09/2020
                                                                                            01/14/2020     12/09/2019

01 [redacted]    12/09/2019 TA     FIG01   1.50  BCB    141.00        0.00  SERV                   141.00  12/20/2019
                 1101815755 H      7                                                                       12/20/2019
   H01    H2015  1101424389        MSJ601722586                                             0000010553     01/09/2020
                                                                                            01/14/2020     12/16/2019
```

These conditions can only be used with certain reports that have been modified to support them (and to display at least the Remit Date) (below):