


Logging into SETWorks

Type www.set-works.com into the address bar of the browser. When the website opens up, click “Log In” in the upper right corner.



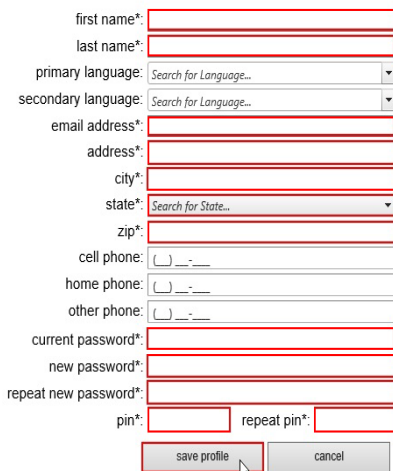
Enter your SETWorks username and password. Click “Log In.”



The first time you log in, SETWorks will require that you change your password and set up your profile. Enter the required fields including your new password and a PIN (a four-digit number). **For last name please add your company name in that same field (ex: Smith- ABC company).** Click Save Profile.

SETWorks™

Welcome! Before you log in for the first time, please tell us a little about you.



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Once logged in, the Provider Home page will be shown. On it are two tabs: one for secure Messages and one for Billing.

Messages

There are no new messages.

[View all messages](#)

Billing

Provider: Department: Service Dates: - Service: Consumer: Billing Status:

Service	Month	Status	Date Submitted	Submitted By
> Occupational Therapy	June 2018	Not Started		
> Social Skills Group	June 2018	Not Started		
> Speech Therapy	June 2018	Not Started		
> Occupational Therapy	May 2018	Not Started		<input type="button" value="Submit"/>
> Social Skills Group	May 2018	Not Started		<input type="button" value="Submit"/>
> Speech Therapy	May 2018	Not Started		<input type="button" value="Submit"/>

Viewing Authorizations

On the Billing tab, there are a variety of ways to view authorization information.

Sorting

The authorization list defaults to sort by Month, with the most recent month shown at the top of the list. The list can also be sorted by Service, Status, Date Submitted and Submitted By if you click on the column heading. If the list sorts in the wrong "direction," click on the column heading again.

Filtering

At the top of the billing tab are a number of fields with drop-down lists. By selecting a value from a drop-down list you selectively "filter" the list of authorizations to include only those that contain the value of the selected filter.

Billing

Filter the list by choosing values from the drop-down lists inside the blue box

Provider: Department: Service Dates: - Service: Consumer: Billing Status:

<input type="text" value="Service"/>	<input type="text" value="Month"/>	<input type="text" value="Status"/>	<input type="text" value="Date Submitted"/>	<input type="text" value="Submitted By"/>	<-- Sort the list by clicking on a column heading
> Occupational Therapy	June 2018	Not Started			
> Social Skills Group	June 2018	Not Started			
> Speech Therapy	June 2018	Not Started			
> Occupational Therapy	May 2018	Not Started		<input type="button" value="Submit"/>	
> Social Skills Group	May 2018	Not Started		<input type="button" value="Submit"/>	
> Speech Therapy	May 2018	Not Started		<input type="button" value="Submit"/>	
> Occupational Therapy	April 2018	Not Started		<input type="button" value="Submit"/>	
> Social Skills Group	April 2018	Not Started		<input type="button" value="Submit"/>	
> Speech Therapy	April 2018	Not Started		<input type="button" value="Submit"/>	

For example, by choosing “Speech Therapy” for the Service filter, the list will only show authorizations for Speech Therapy:

Billing

Provider: TestProvider
Department: All
Service Dates: 7/1/2017 - 6/30/2018
Service: Speech Therapy
Consumer: All
Billing Status: 4 items checked

	Service ▲	Month	Status	Date Submitted	Submitted By
>	Speech Therapy	June 2018	Not Started		
>	Speech Therapy	May 2018	Not Started		Submit
>	Speech Therapy	April 2018	Not Started		Submit
>	Speech Therapy	March 2018	Not Started		Submit
>	Speech Therapy	February 2018	Not Started		
>	Speech Therapy	January 2018	Not Started		
>	Speech Therapy	December 2017	Not Started		
>	Speech Therapy	November 2017	Not Started		
>	Speech Therapy	October 2017	Not Started		
>	Speech Therapy	September 2017	Not Started		
>	Speech Therapy	August 2017	Not Started		
>	Speech Therapy	July 2017	Not Started		

+ create billing
Refresh

Similarly, the list can be filtered by individual client (Consumer), Service Dates (month) and Billing Status.

Viewing Authorization Details by Service and Month

Each line of service by month can be expanded to show basic information for each client. Click on the arrow icon beside a line in the list.

>	Speech Therapy	June 2018	Not Started
>	Occupational Therapy	May 2018	Not Started

The expanded view will provide you client information as well as service units provided (Recorded) and units Authorized.

Recording Authorized Units Provided

To record utilized units for the service, click the pencil icon next to any authorization line.

<div> </div>	Speech Therapy	June 2018	Not Started	Submit
Consumer	DOB	DMH #	Recorded Units	Authorized Units
Brown, Charlie	1/1/1955	1111111	0	11

The Create Billing Submission screen will appear. This screen provides detailed information regarding the service authorization timeframe, units authorized and units provided for each individual authorized. The screen also provides a grid to enter service units provided for each day of the month, and includes a place to attach progress notes.

create billing submission close

Billing Month: June 2018
 Provider: Ability Network
 Service: Speech Therapy

Brown, Charlie
 DOB: 1/1/1955
 DMH: 1111111
 SC: Blinne, Wayne

Authorization
 Dates: 1/1/2018 - 12/31/2018
 June '18: 11 units / 3.75 hrs.
 YTD: 66 units / 16.5 hrs.
 Total: 132 units / 33 hrs.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

[attach documentation](#) (0 attached)

Utilization (units)

Key: Used Current YTD Future

Save
 Status: Not Started
 Usage: Rate: \$17.00/unit, Units: 0 / Total: 55, Billing: \$0.00

To enter units provided, type the number of units provided in the appropriate dates on the month grid. Notice that the information in the Usage box updates as you enter daily units. In addition, utilization of the entire authorization will be tracked on the grid at the bottom.

create billing submission close

Billing Month: June 2018
 Provider: Ability Network
 Service: Speech Therapy

Brown, Charlie
 DOB: 1/1/1955
 DMH: 1111111
 SC: Blinne, Wayne

Authorization
 Dates: 1/1/2018 - 12/31/2018
 June '18: 11 units / 3.75 hrs.
 YTD: 66 units / 16.5 hrs.
 Total: 132 units / 33 hrs.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
					1	
					2	
					8	
					2	
					15	
					2	
					22	
					2	
					29	
					2	

[attach documentation](#) (0 attached)

Utilization (units)

Key: Used Current YTD Future

Save
 Status: Not Started
 Usage: Rate: \$17.00/unit, Units: 11 / Total: 66, Billing: \$187.00

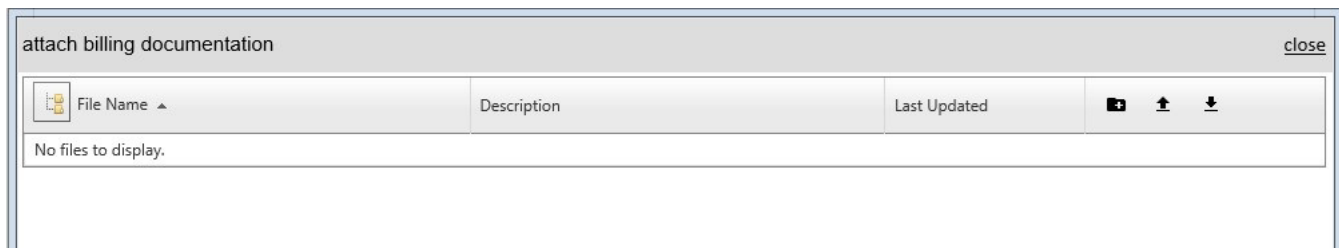
Attaching Progress Notes

To attach progress notes, click the Attach Documentation link below the month grid.

24 25 26 27 28

[attach documentation](#) (0 attached)

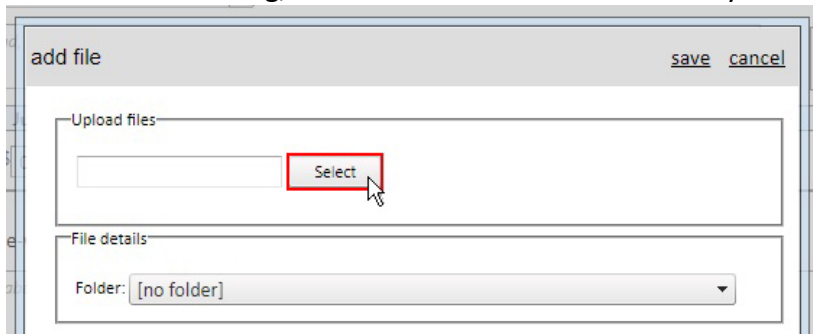
The Attach Billing Documentation screen will appear.



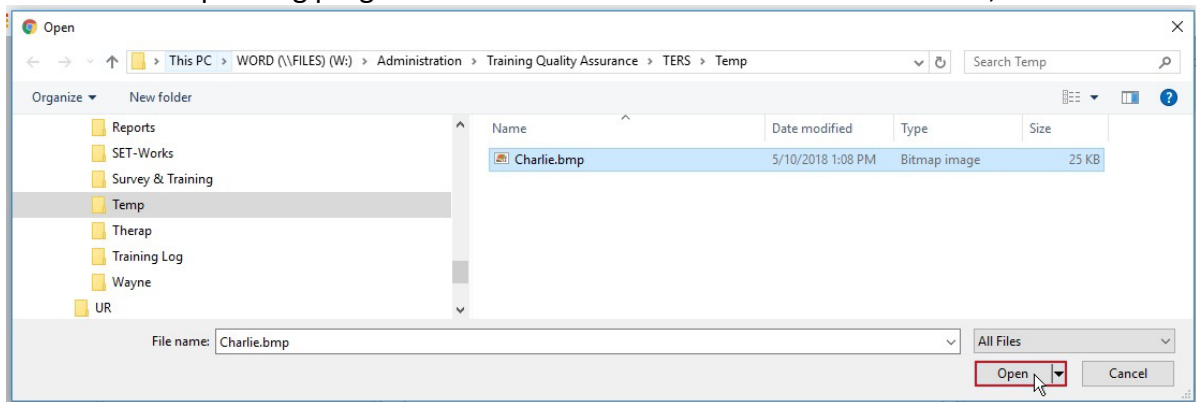
The icons on the right allow you to create folders and upload or download files. Click the Upload Files icon:



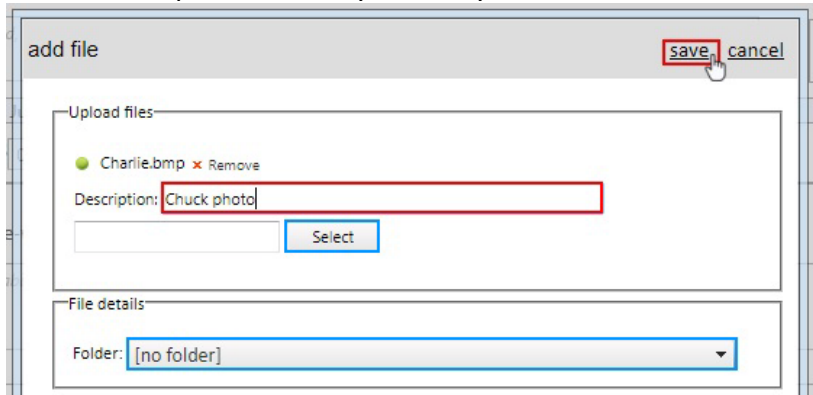
In the Add File dialog, click Select to browse for the file you want to upload to the request:



Find the corresponding progress note for the selected month and individual, select that file and click Open:



Enter a description for the file (this is required). More files can be added by clicking Select again. Documents can also be uploaded to any folders you have created. Click Save to finalize adding the file(s):



The file(s) will now be listed in the Attach Billing Documentation section. Click on the file name to preview it. You can also delete an uploaded document by clicking on the X icon to the right (you will be asked to verify deletion):

File Name ▲	Description	Last Updated	
Charlie.bmp	Chuck photo	5/10/2018 1:33:26 PM	

Preview Charlie.bmp Delete

Saving a Billing Submission for a Client

Once units have been entered, and progress notes have been attached, double-check for accuracy and click the Save button.

create billing submission close

Billing Month: June 2018
 Provider: Ability Network
 Service: Speech Therapy

Brown, Charlie
 DOB: 1/1/1955

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
					1	

Save
 Status: Not Started

NOTE: clicking the Save button will not close the billing submission form. This saves the units provided and attaches progress notes for only the one individual.

Additional clients authorized for that service and that month are also available on the Create Billing Submission screen if you continue to scroll down. Additional pages of authorizations can be accessed by using the page navigation icons at the bottom of the screen.

1

Page size 3 ▼

NOTE: Before submitting billing for the month, all units provided and progress notes for all clients must be submitted at the same time.

Click close to return to the main billing screen, but be sure that you have saved all work for EVERY client first.

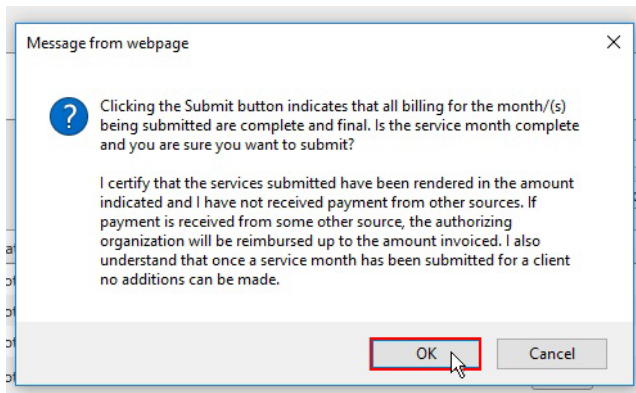
Submitting Billings

After closing the Create Billing Submission screen, you should see the main authorization list again. To officially submit a billing for a service month click on the Submit button to the right of the service for the month in question.

>	Speech Therapy	June 2018	Not Started	Submit
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Note: This can only be done once per month, and all of your billed services for that month must be included in the one-time submission. So, assure that all units for every individual and the corresponding progress notes are all included for the month.

Once you've clicked submit, a pop-up window will appear asking to verify and certify that you want to finalize the service billing for the month. To do so, click OK:



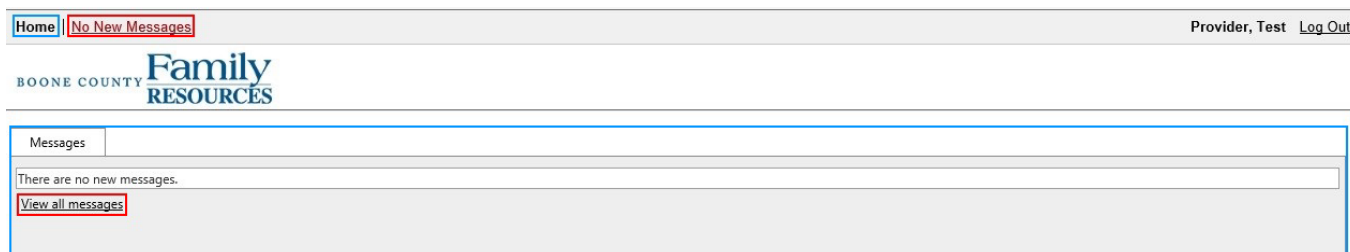
On the authorizations list, the billing status will now display as Submitted and the Submission Date will be listed as well.

Returned Submissions

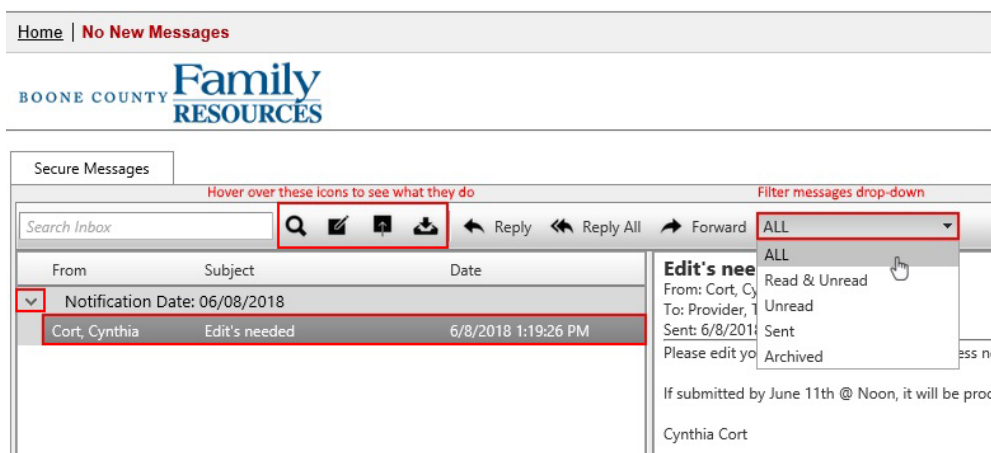
On occasion, a submitted billing will be returned for correction or additional progress notes. When this happens, you will receive a secure email in SETWorks from BCFR Billing detailing the changes needed. The status for that billing should now read “Pending Updates” and the billing will be editable. Make the necessary changes and re-submit.

Sending and Receiving Secure Messages in SETWorks

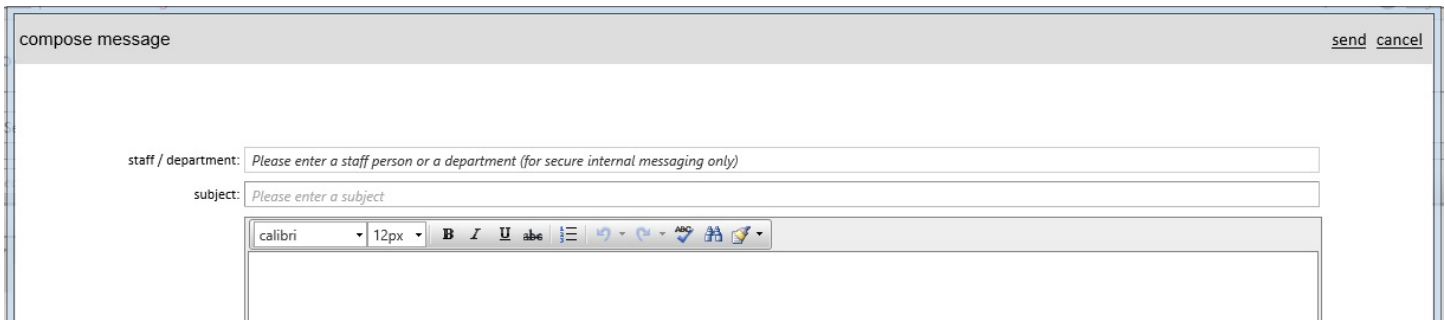
Secure messaging between the Provider and BCFR Billing and Accounting will be completed within the SETWorks system. To access your messages, click the Home link in the upper left, then View All Messages or just the messages link that is directly to the right of the Home link:



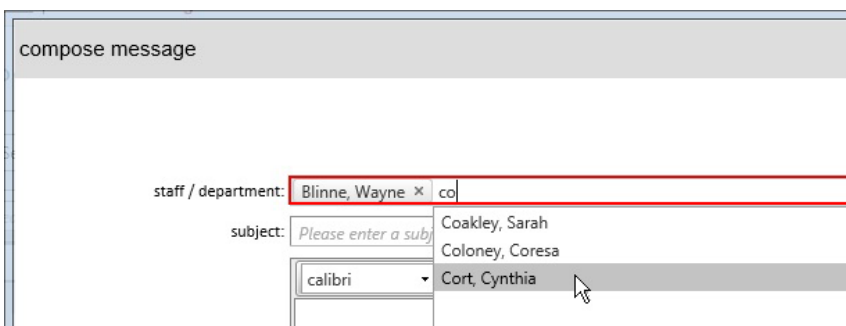
In the Secure Message area of SETWorks, you can Reply, Reply All, Forward, Compose New Messages, Mark Messages as Read or Unread, etc. just like you would in any email program. You can also filter the messages in your Inbox to include only the messages of interest to you. To see all of your messages, select ALL from the filter messages drop-down list on the right side of the screen.



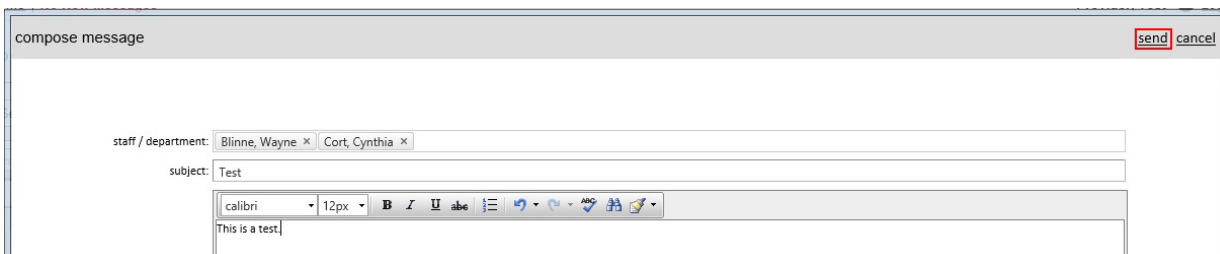
To compose a message, click on the Compose Message icon . This brings up a new, blank message.



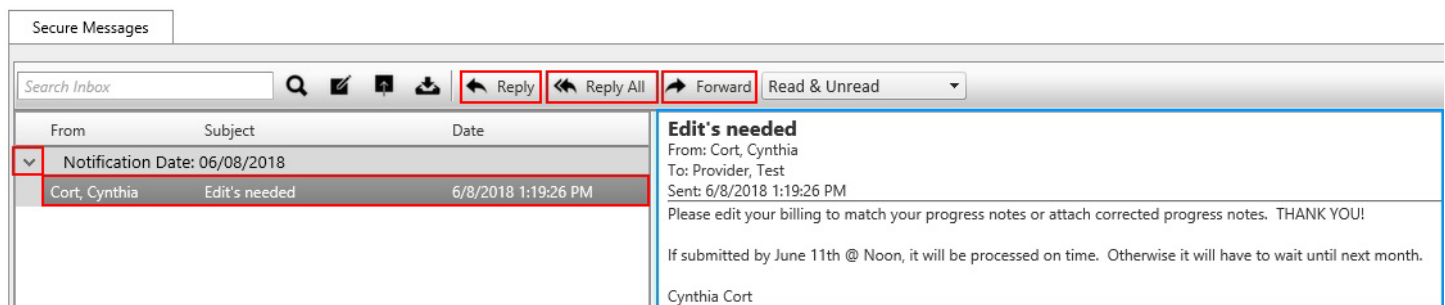
Begin typing in the name of the BCFR staff member to select them from this list. You can repeat this process to send messages to more than one BCFR staff member.



Once you have finished composing your message, click Send in the upper right.



To read a message, click on the message in the messages list. The body of the message will appear to the right in the reading pane. To reply or forward, click on the appropriate icon above the messages list.



From	Subject	Date
Notification Date: 06/08/2018		
Cort, Cynthia	Edit's needed	6/8/2018 1:19:26 PM

Edit's needed
From: Cort, Cynthia
To: Provider, Test
Sent: 6/8/2018 1:19:26 PM
Please edit your billing to match your progress notes or attach corrected progress notes. THANK YOU!
If submitted by June 11th @ Noon, it will be processed on time. Otherwise it will have to wait until next month.
Cynthia Cort