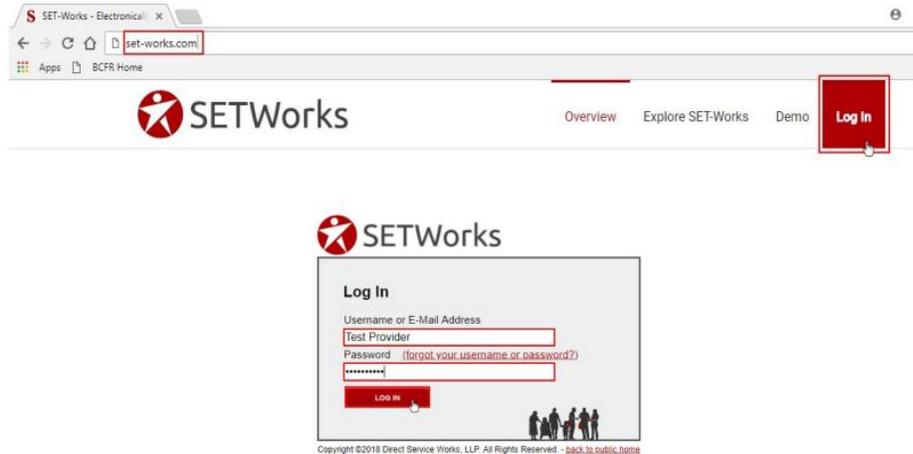


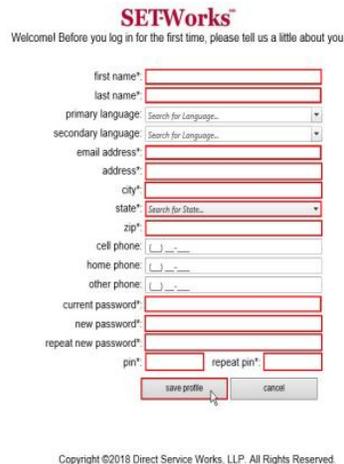
SETWorks Provider Billing Guide

Log into SETWorks

1. Go to www.set-works.com, click **Log In**, and enter your credentials.



2. On first login, reset your password and create a 4-digit PIN.
 - When entering your last name, please include your company name as well (e.g., “Smith-ABC Company”).



3. Click **Save Profile** to access the Provider Home page (with tabs for **Messages** and **Billing**).

View & Sort Authorizations

- Navigate to the **Billing** tab to see service authorizations by month.

The screenshot shows the 'Billing' tab in the Boone County Family Resources system. At the top, there are navigation links for 'Home', 'No New Messages', 'Provider, Test', and 'Log Out'. Below this is the 'Messages' section, which states 'There are no new messages.' and includes a link to 'View all messages'. The main 'Billing' section contains several filters: 'Provider' (TestProvider), 'Department' (All), 'Service Dates' (7/1/2017 - 6/30/2018), 'Service' (All), 'Consumer' (All), and 'Billing Status' (4 items checked). Below the filters is a table with columns: Service, Month, Status, Date Submitted, and Submitted By. The table lists several entries for Occupational Therapy, Social Skills Group, and Speech Therapy for the months of June, May, and April 2018, all with a status of 'Not Started'. Each row has a 'Submit' button.

- Click column headers (e.g., Service, Status) to sort. Click again to reverse order.

Filter Authorizations

- Use drop-down filters for Service, Consumer, Month, and Billing Status to narrow results.

This screenshot is similar to the previous one but highlights the filter and sorting options. A blue box highlights the filter area, and red boxes highlight the 'Service', 'Consumer', and 'Billing Status' dropdown menus. The table headers 'Service', 'Month', 'Status', 'Date Submitted', and 'Submitted By' are also highlighted in red. A red instruction at the top reads: 'Filter the list by choosing values from the drop-down lists inside the blue box'. Another red instruction at the bottom of the table headers reads: '<-- Sort the list by clicking on a column heading'. The table content remains the same as in the previous screenshot.

Expand Details & Record Units

- Click the expand arrow to the left of a service line to view individual details, authorized units, and usage.

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

- Click the pencil icon to the left of a service line to open the **Create Billing Submission** screen.

		Speech Therapy	June 2018	Not Started	<input type="button" value="Submit"/>
Consumer	DOB	DMH #	Recorded Units	Authorized Units	
Brown, Charlie	1/1/1955	1111111	0	11	

- Enter daily units in the calendar grid — this will update the monthly usage totals automatically.

create billing submission close

Billing Month:

Provider:

Service:

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.

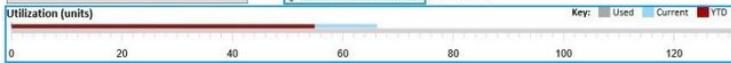
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Status: Not Started

Usage
 Rate: \$17.00/unit
 Units: 11 / Total: 66
 Billing: \$187.00

(0 attached)

Utilization (units) Key: █ Used █ Current █ YTD █ Future



- Authorization, Usage, and Utilization grid show total usage vs. authorized units.

create billing submission close

Billing Month:

Provider:

Service:

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

Status: Not Started

Usage
 Rate: \$17.00/unit
 Units: 0 / Total: 55
 Billing: \$0.00

(0 attached)

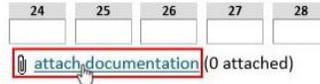
Utilization (units) Key: █ Used █ Current █ YTD █ Future



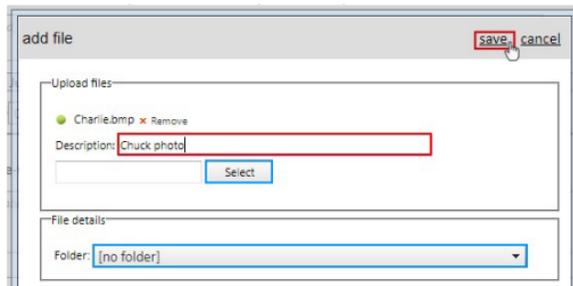
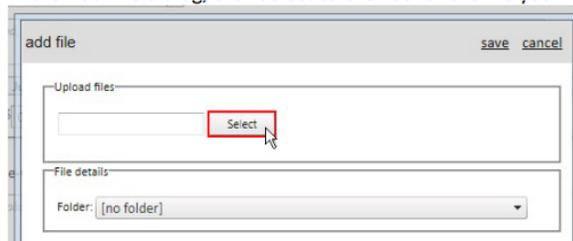
Page size: 3

Attach Progress Notes

1. Click **Attach Documentation** below the calendar grid.



2. In the pop-up, use the upload icon to add files — note a description is required.



3. Uploaded files appear in a list; use the "X" to delete if needed.

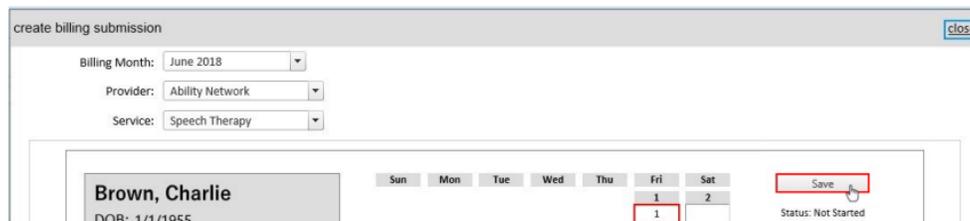


Save Billing Entries

- After entering units and attaching notes, click **Save** (this does not close the window, it saves the information you have entered for the individual).
- Scroll to repeat for all clients included in that service/month. Ensure all pages were viewed by using the page scroll at the bottom of the Create Billing Submission screen.



- Once all entries are made, click **Close** to return to the main Billing screen.

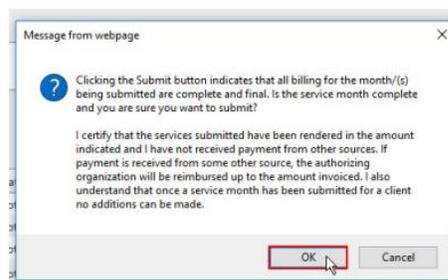


Submit Billing

1. On the main Billing screen, click **Submit** for the relevant service and month.



2. A confirmation pop-up will appear asking you to verify and certify that you want to finalize the service billing for the month — click **OK** to finalize.



3. Status changes to **Submitted**, along with the date.

NOTE: Before submitting your billing for the month, all units provided and progress notes for all individuals **MUST** be submitted at the same time. Submission can only be

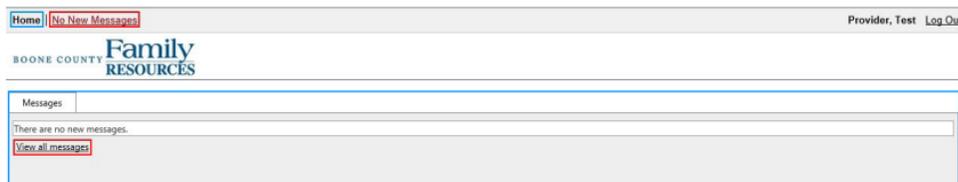
done once per month. Please be sure that all units for EVERY individual and their corresponding progress notes are all included for the month.

Handle Returned Submissions

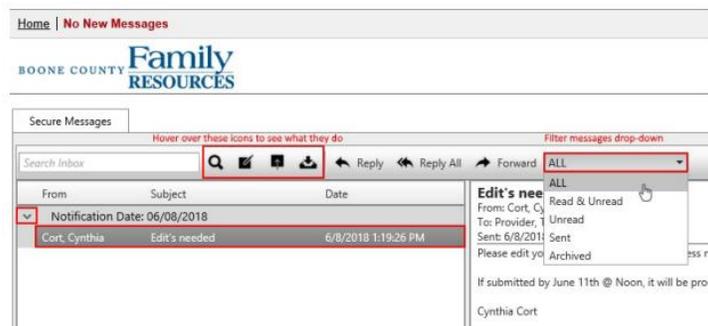
- If BCFR needs revisions to your submitted billing, the billing is marked **Pending Updates**.
- You'll receive a secure message with instructions on the revisions required — please make changes and re-submit.

Use Secure Messaging

- Access messages via the **Home** or **View All Messages** links.



- You can compose, reply, forward, mark read/unread, and filter messages.



BCFR e-Billing FAQ Summary

(For full details, please refer to the complete FAQ on the BCFR website.)

- **Submission Deadline:** Billing must be submitted by 5:00 PM on the 5th of each month to ensure payment within the same month. If the 5th falls on a weekend or holiday, the deadline is 5:00 PM on the following business day.
- **Payment Schedule:** Payments are sent on the 20th of each month. If the 20th falls on a weekend or holiday, payment will be sent on the prior business day.
- **Grace Period:** Submissions are accepted up to 95 days after the service month. Requests submitted beyond this period require prior approval from BCFR.
- **Unit Tracking:** SETWorks tracks both monthly ("soft") unit limits and total authorized ("hard") unit limits. Units may be flexibly used within the approved authorization period.

Important Reminders

- **Review Before Submission:** Ensure all clients and supporting documentation (e.g., progress notes) are included before submitting. Once submitted, billing entries are final.
- **Monitor Unit Usage:** Regularly review "Used" vs. "Authorized" units in SETWorks to prevent overutilization.
- **Support & Corrections:** For missing authorizations or required corrections, contact: serviceprocurement@bcfr.org or your Agency assigned staff.