

INDIVIDUAL ADVOCACY

IMPROVING CLIENT DATA MANAGEMENT & MEDICAL CLAIM EFFICIENCY

New Access Database Overview

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EXECUTIVE SUMMARY

A centralized database that unifies client records, case manager activity, and Medicaid billing data—reducing errors, improving access to information, and protecting over \$100K/month in revenue.

What the system delivers:

- One source of truth for 400+ clients
- Immediate visibility into authorizations & unit usage
- Faster, more accurate Medicaid billing
- TCM-friendly workflows and customized reporting
- Improved compliance and service continuity

PROBLEM

Fragmented data caused recurring billing delays, incomplete client records, and preventable revenue loss.

Key Challenges:

- Average of \$5K+ monthly at risk due to various claim issues
- 400+ client records scattered or incomplete
- No centralized billing hub for claim status or authorization info
- Unknown authorization lapses risking service interruptions
- Manual processes created delays and inconsistent data accuracy

SOLUTION

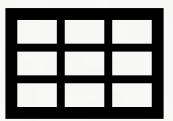
A unified Client & Medicaid Billing Database that streamlines billing, improves data accuracy, and supports day-to-day TCM operations.

Key Challenges:

- Centralized data access for clients, TCMs, and units
- Faster claim tracking across all months
- Automated authorization visibility to prevent lapses
- Accurate monthly billing + cross-checks
- Instant reports for management and case managers

DATABASE ARCHITECTURE

Designed for stability, separation of duties, and future scalability.



Tables

- Client Master Table
- Monthly Billing Tables
- Case Manager
- Client Information
- UHC Clients



Forms

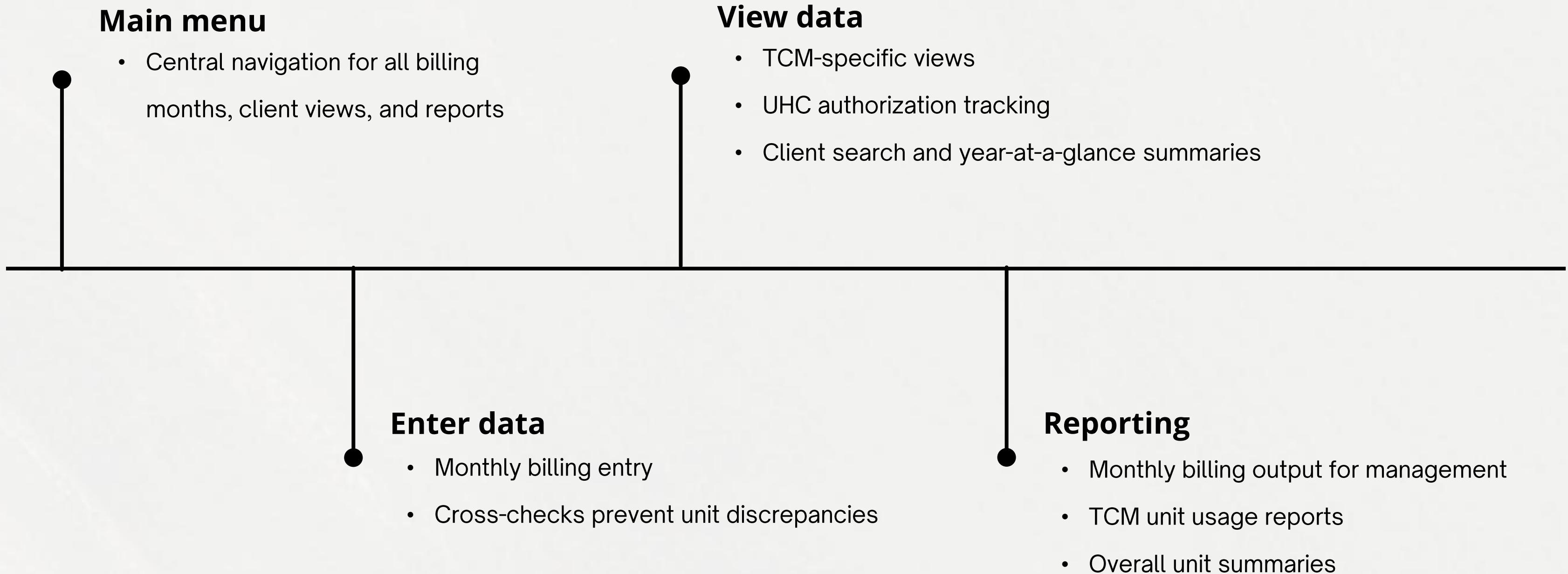
- Billing Entry
- Client Lookup
- TCM Tracking
- Client/TCM Editing



Reports

- TCM Client List & Units
- Overall Unit Usage
- Authorizations
- Ad Hoc Views

WORKFLOW OVERVIEW



MONTHLY BILLING FORM

Ensures accurate billing by combining unit entry, claim information, and built-in validation.

Key features:

- Top form: TCM unit entry + automatic total calculation
- Bottom form: Monthly billing details, claim numbers, and notes
- Cross-check logic ensures unit totals match
- Conditional formatting: Unpaid claims flagged in red
- Search & filter for multiple clients

Why it matters:

- Reduces manual errors
- Supports real-time claim status tracking
- Improves month-end billing accuracy

The screenshot displays the 'April Billing' software interface. The top navigation bar includes links for 'New Client', 'View Overall Billing', 'Billing by TCM', and 'Back to Menu'. Below the navigation is a sub-menu titled 'Apr_Unit_Totals' with columns for 'tcm', 'Apr Total', and 'Apr PP'. To the right of this are two input fields: 'Total TCM Units:' set to 0 and 'Total Billed Units:' also set to 0. The main data area is a grid table with columns: MCO, Client Name, DOB, Medicaid#, Units, OUnits, TotalUnits, \$Bill, Balance, Paid, Claim#, and Note. All rows in the table show 0 values across all columns, indicating no data has been entered.

MCO	Client Name	DOB	Medicaid#	Units	OUnits	TotalUnits	\$Bill	Balance	Paid	Claim#	Note
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		
HB				0	0	0	\$0.00	\$0.00	\$0.00		

CLIENT & TCM VIEWS

Client Information

Client Name:

Medicaid ID:

MCO: U

DOB:

Allotted Units: 240

PA units: 0

PA date:

Start Date:

End Date:

Status: Medicaid

Authorization: *

Note:

TCM:

Record: 14 | 1 of 340 | < > No Filter | Search

Case Managers

ID: 2

TCM:

TCM Initials: LM

TCM Login:

Unit Summary

	Jan Units	Jan PP	Feb Total	Feb PP	Mar Total	Mar PP	Apr Total	Apr PP	May Total	May PP	Jun Total	Jun PP	Jul Total	Jul PP	Aug Total	Aug PP	Sep Total	Sep PP	Oct Total	Oct PP	Nov Total	Nov PP	Dec Total	Dec PP
Jan Units	622				603	46			0				622	74	520	64	603	46						
Jan PP		74											74											
Feb Total			520										520											
Feb PP				64									64											
Mar Total					603								603											
Mar PP						46							46											
Apr Total							Oct Total																	
Apr PP							Oct PP																	
May Total							May Total	0																
May PP							May PP																	
Jun Total							Jun Total																	
Jun PP							Jun PP																	

Record: 14 | 1 of 11 | < > No Filter | Search

Client View:

- Core client details for billing
- TCM dropdown linked to Case Managers table
- Note section for Care Coordinator/Guardian information

TCM View:

- Incorporate staff photos
- Monthly ‘Unit Summary’ for Medicaid and Private Pay
- ‘TCM Login’: If security levels are needed for access

REPORTING

Overall Units Used											
MCO	CLIENT	MED ID	Init. Units	PA	Remain	Used	Jan	Feb	Mar		
HB			240	0	154	86	62	11	13		
HB			240	0	195	45	25	11	9		
HB			240	0	167	73	30	15	28		
HB			240	0	205	35	16	9	10		
HB			240	0	128	112	55	36	21		
HB			240	0	206	34	11	13	10		

Overall Units Report:

- Management-level summary
- Displays units granted (PA) and units used
- Supports service continuity and audit requirements

Overall Units Used - TCM											
MCO	CLIENT	MED ID	IU	PA	Remain	Used	Jan	Feb	Mar	Apr	
HB			240	0	128	112	55	36	21	0	
					<i>Units from other TCMs</i>		0	0	0	0	
HB			240	0	198	42	18	18	6	0	
					<i>Units from other TCMs</i>		0	0	0	0	
HB			240	0	212	28	12	7	9	0	
					<i>Units from other TCMs</i>		0	0	0	0	
S			240	0	193	47	13	19	15	0	

TCM Units Report:

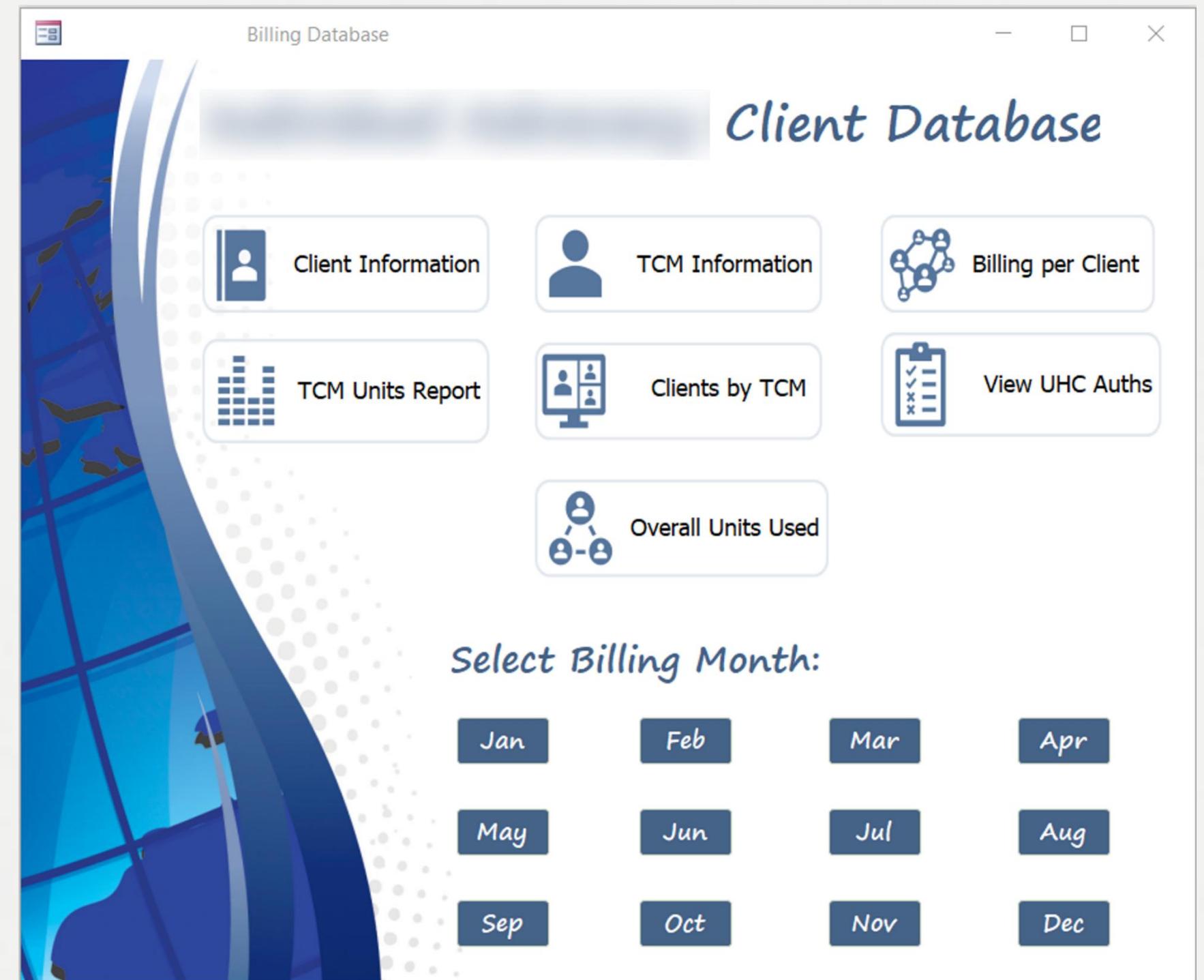
- Filtered by TCM initials
- Shows unit usage across all clients
- Includes secondary TCMs if applicable

IMPACT AND VALUE

The new database improves accuracy, transparency, and revenue protection across the organization.

Measurable Benefits:

- Protects \$5K+ monthly revenue previously at risk due to denials
- Eliminates manual tracking of units and claim status
- Improves compliance with authorization requirements
- Creates an audit-ready trail for all billing data
- Scales for future forms, reports, or additional services



TECHNICAL SIDE OF THINGS

```
1  SELECT
2    MasterClientList.[Client Name],
3    MasterClientList.[Medicaid#],
4    MasterClientList.[MCO],
5    MasterClientList.[DOB],
6    "January" AS [Month],
7    Jan_Billing.[UNITS],
8    Jan_Billing.[OTCM units],
9    Jan_Billing.[Total Units],
10   Jan_Billing.[$Bill],
11   Jan_Billing.[Balance],
12   Jan_Billing.[Paid],
13   Jan_Billing.[Note]
14  FROM
15  MasterClientList
16  LEFT JOIN
17  Jan_Billing ON MasterClientList.[Medicaid#] = Jan_Billing.[MED ID]
18
19  UNION ALL
```

Other technical tid-bits & Next Steps:

- The Database has been split into a ‘Front-End’ and a ‘Back-End;
 - Front-End – contains the forms and the reports
 - Back-End – contains the tables and queries and it not accessible in order to maintain the database’s integrity
- Specialized reports can be created as needed
- All data tables can be exported into either CSV or Excel files and used for visualizations
- Update Queries are incorporated to ensure that any new clients appears in the appropriate billing month’s data entry table(s) and reports

How is the information combined?

- Select information from the ‘Clients’ and each monthly billing table is combined into one using SQL (Structured Query Language) . Queries were created for each billing month
- Information from the two tables are joined on the client’s Medicaid number

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Thank You!

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