Customizing SRS

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UC2015
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SRS Customizing Basics

- **Category**
  - Which type of report are you looking for?

- **Criteria**
  - Selecting criteria that will answer your questions

- **Output**
  - Where and in which format do you want the report.
Report Categories

- Custom/Homegrown Reports
- Aging (A/R) Reports
- Billing and Collection Reports
- Charge Reports
- Clinical Reports
- Partner Table Lists
- Patient Demographic and Policy Reports
- Payment and Proving Out Reports
- Provider Productivity Reports
- RVU Reports
- Scheduling Reports
- Trend Analysis Reports
- Visit Reports
Select Category

SMART REPORT SUITE
Report Category Selection

- Custom/Homegrown Reports
- Aging (A/R) Reports
- Billing and Collection Reports
- Charge Reports
- Clinical Reports
- Partner Table Lists
- Patient Demographic and Policy Reports
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- Provider Productivity Reports
- RVU Reports
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- Visit Reports
Aging (A/R) Reports

Use Page Up/Page Down to view all the reports available in this category.

- Accounts with Credit Balances
- Accounts with Total Balance Over $x
- Aging by Provider
- Aging by Responsible Party and Provider
- Aging by Responsible Party Group ('insaging' style)
- Aging Detail by Responsible Party Group ('aging' style)

Selected Report Description
This report displays aging balance totals by responsible Insurance Group and then account. This report excludes accounts with credits.

Select Report
Default Criteria Screen

Aging Detail Report by Responsible Party Group

**Aged How?**
- Transaction Date
- Posting Date
- Payor Date

**Aged as of what date?**
- Nightly File
- Existing File for: 12/06/06
- Regenerate as of: 11/17/07

*Note that this option has to create the aging data first, which is very time consuming.*

Generate Report

Restore Criteria
Summary of Report Criteria

Aging Detail by Responsible Party Group ('aging' style)
Description of Restriction Criteria
Press the F3 key to add to, or edit, the restriction listing below.

Using Nightly Aging File

Aging by Transaction Date

Account Balance Current Category selection.
Range is between $0.00 and $9999999.00.
Destination Selection

- View on Screen
- Print
- E-mail
- Save to Workstation
- Save to 'srsfiles'

Process
## Aging Detail by Responsible Party Group ('aging' style)

<table>
<thead>
<tr>
<th>Acct Last Name</th>
<th>Acct First Name</th>
<th>Aging Last Pmt</th>
<th>Aging 0..29</th>
<th>Aging 30..59</th>
<th>Aging 60..89</th>
<th>Aging 90..119</th>
<th>Aging 120+</th>
<th>Aging Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setlock</td>
<td>Kevin</td>
<td>03/21/15</td>
<td>$168.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$168.00</td>
</tr>
<tr>
<td>Acker</td>
<td>Paul M</td>
<td>04/04/15</td>
<td>$128.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$128.00</td>
</tr>
<tr>
<td>Theodore</td>
<td>Michael</td>
<td>06/07/15</td>
<td>$87.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$87.00</td>
</tr>
<tr>
<td>Garcia</td>
<td>Edward</td>
<td>04/11/15</td>
<td>$0.00</td>
<td>$73.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$73.00</td>
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<tr>
<td>Burgdorf</td>
<td>Brian</td>
<td>06/01/15</td>
<td>$72.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$72.00</td>
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<tr>
<td>Priest</td>
<td>Dennis</td>
<td>05/02/15</td>
<td>$72.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$72.00</td>
</tr>
<tr>
<td>Naylor</td>
<td>David</td>
<td>06/01/15</td>
<td>$70.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$70.00</td>
</tr>
<tr>
<td>Jones</td>
<td>Ted</td>
<td>06/05/15</td>
<td>$68.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$68.00</td>
</tr>
<tr>
<td>Sternberger</td>
<td>Lori/Peter</td>
<td></td>
<td>$54.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$54.00</td>
</tr>
<tr>
<td>Gallagher</td>
<td>Donald</td>
<td>04/17/15</td>
<td>$54.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$54.00</td>
</tr>
<tr>
<td>Feaster</td>
<td>Adam</td>
<td>05/28/15</td>
<td>$53.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$53.00</td>
</tr>
<tr>
<td>Mitro</td>
<td>Stephen</td>
<td>05/09/15</td>
<td>$0.00</td>
<td>$50.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$50.00</td>
</tr>
<tr>
<td>Franz</td>
<td>Neal</td>
<td>06/05/15</td>
<td>$41.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$41.00</td>
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<tr>
<td>Willard</td>
<td>Kenneth</td>
<td>06/01/15</td>
<td>$36.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$36.00</td>
</tr>
<tr>
<td>Darrin</td>
<td>Dale</td>
<td>04/02/15</td>
<td>$0.00</td>
<td>$28.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$28.00</td>
</tr>
<tr>
<td>Benovy</td>
<td>Dan</td>
<td></td>
<td>$10.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$10.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Total</strong></td>
<td><strong>$2,664.00</strong></td>
<td><strong>$1,078.00</strong></td>
<td><strong>$101.00</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$3,843.00</strong></td>
</tr>
</tbody>
</table>

## Aging Ins Group Name: HealthyKids HMO

<table>
<thead>
<tr>
<th>Acct Last Name</th>
<th>Acct First Name</th>
<th>Aging Last Pmt</th>
<th>Aging 0..29</th>
<th>Aging 30..59</th>
<th>Aging 60..89</th>
<th>Aging 90..119</th>
<th>Aging 120+</th>
<th>Aging Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jones</td>
<td>Edward</td>
<td>04/30/15</td>
<td>$0.00</td>
<td>$450.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$450.00</td>
</tr>
<tr>
<td>Graybill</td>
<td>Christopher</td>
<td>06/07/15</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td>Swamy</td>
<td>Steven</td>
<td>05/18/15</td>
<td>$175.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$175.00</td>
</tr>
<tr>
<td>Depew</td>
<td>Amanda</td>
<td>05/09/15</td>
<td>$0.00</td>
<td>$41.00</td>
<td>$100.30</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$141.30</td>
</tr>
<tr>
<td>Horricks</td>
<td>Olga</td>
<td>03/21/15</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$106.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$106.00</td>
</tr>
</tbody>
</table>
How to Customize SRS

- Select different or additional criteria
- Amend a selection
- Save criteria as a user default
- Save criteria as a report option
- Save copies of report to srsfiles
Add/Edit Criteria

Aging Detail by Responsible Party Group ('aging' style)
Description of Restriction Criteria

Press the add key to add to, or edit, the restriction listing below.

Using Nightly Aging File

Aging by Transaction Date

Account Balance Current Category selection.
Range is between $0.00 and $99999999.00.
To Search Criteria List

Use the "*" to help find all the available criteria for the report.
Selecting & Adding Criteria

UPPER CASE: Source of the data

Lower Case: Description of the criteria

e.g. ACCOUNT = Guarantor
     AGING = Aging Files

PCC
Pediatric EHR Solutions

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Report Restriction Criteria

Select the restriction criteria for the report.

1) AGING Account Balance Current Category
2) ACING Provider of Service
3) AGING Insurance Company
4) 
5) 
6) 
7) 
8) 
9) 
10) 
11) 
12) 

Accept Criteria
Change or Accept Default Criteria

Account Balance Current Category selection.
Range is between $0.00 and $9999999.00.

The amounts can be changed.
Select Second Criteria

F2 [Select]
Select Dr. Casey as the provider of service.
F3 [Select All]
F4 [Select None]
Select Third Criteria

Useful tools:
[F5] List By Group
[F6] List By Pattern
Description of Restriction Criteria

Using Nightly Aging File
Aging by Transaction Date

Account Balance Current Category selection.
Range is between $0.00 and $9999999.00.

Providers:
Elizabeth Casey, M.D.

Insurance:
GROUP - BCBS

To change a response, to add or remove criteria press F8 [Add/Edit Criteria]
To save the criteria as your user default for this report, simply select F4 [Save as Default].

The following message appears:

Default settings have now been saved.
Please ENTER to continue . . .
Save as Report Criteria

To save the criteria as a report selection, select F5 [Save Rpt Criteria].
Naming and Saving Report Criteria

SAVING FILE

Please enter a description for the save file:
ECBS, Cigna, Keystone
Williams Provider Group
Current Balance => $100.00
sally@yourpractice.pcc.com 06/21/15

Enter a description for the report
Press F[1] and the next screen displays:
Report run has now been saved
Press ENTER to continue...
Restoring Report Criteria

Select F8 [Restore Criteria] and a dialogue box will appear.

* Note that this option has to create the aging data first, which is very time consuming.
Place an “x” before the criteria report you want to use and then press the F1 [Restore File], and the following message appears.

File Restored.
Please press ENTER to continue . . .
# Customized vs Standard Report

<table>
<thead>
<tr>
<th>Acct Last Name</th>
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<th>Aging Last Pmt</th>
<th>Aging 0.29</th>
<th>Aging 30.59</th>
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<tr>
<td>Seftor</td>
<td>Kevin</td>
<td>03/21/15</td>
<td>$168.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$168.00</td>
</tr>
<tr>
<td>Aker</td>
<td>Paul M</td>
<td>04/04/15</td>
<td>$128.00</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$128.00</td>
</tr>
<tr>
<td>Theodore</td>
<td>Michael</td>
<td>06/07/15</td>
<td>$87.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Criteria for this report run:**
- Using Nightly Aging File
- Aging by Transaction Date

**Insurance:**
- GROUP - BCBS

**Account Balance Current Category selection.** Range is between $5.00 and $99999999.00.

**Providers:**
- Elizabeth Casey, M.D.

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**Pediatric EHR Solutions**

**Control Your Future™**
Let's Give It a Go!!!

- Login and run srs
- Select a report category
- Select your report
- Run the report and save it to srsfiles
- Run the same report and add criteria of choice.
- Compare the reports
- Do another variation
Thanks for attending.
Happy reporting!!!!