Customizing SRS

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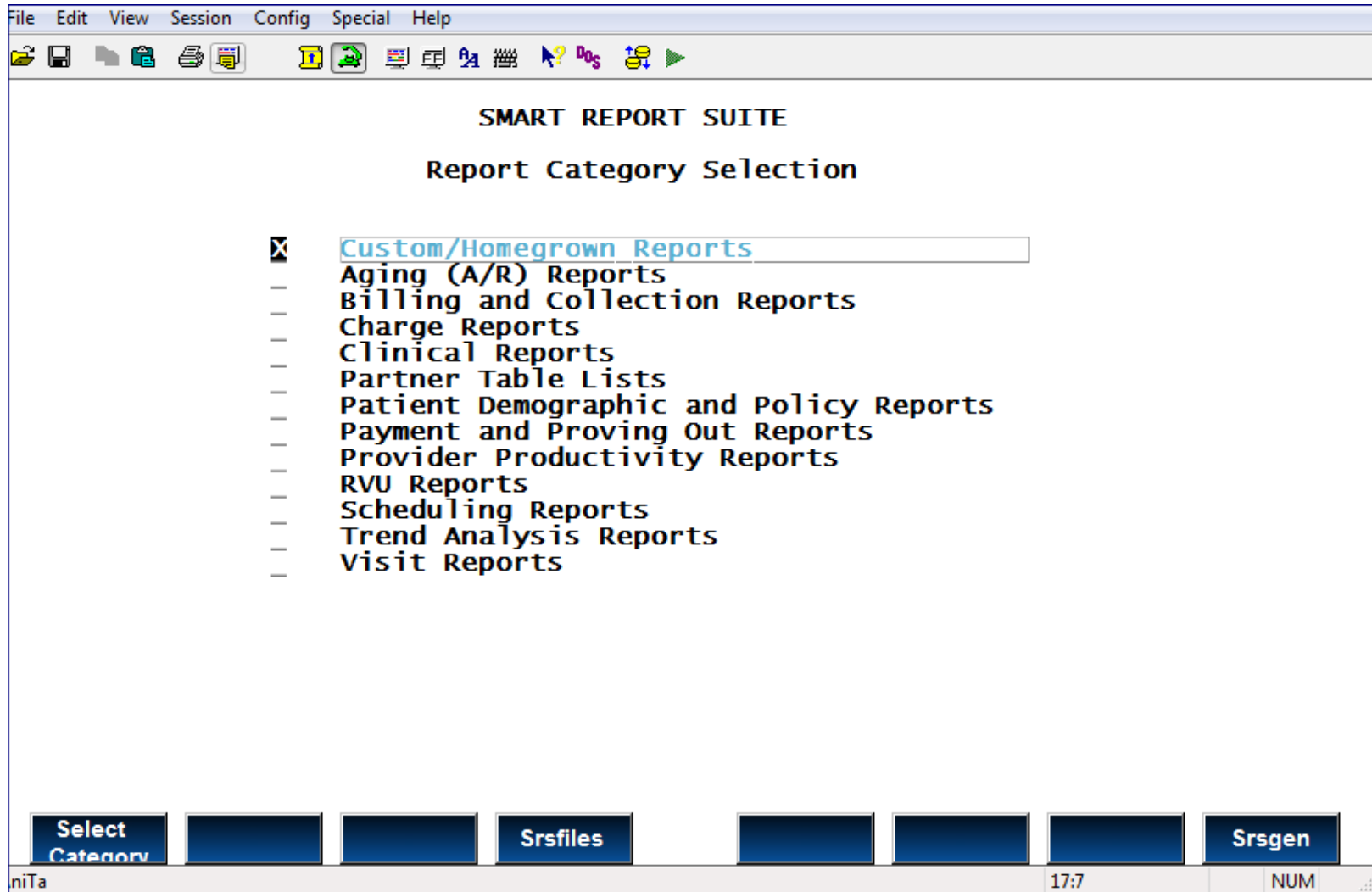# SRS Customizing Basics

- 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.

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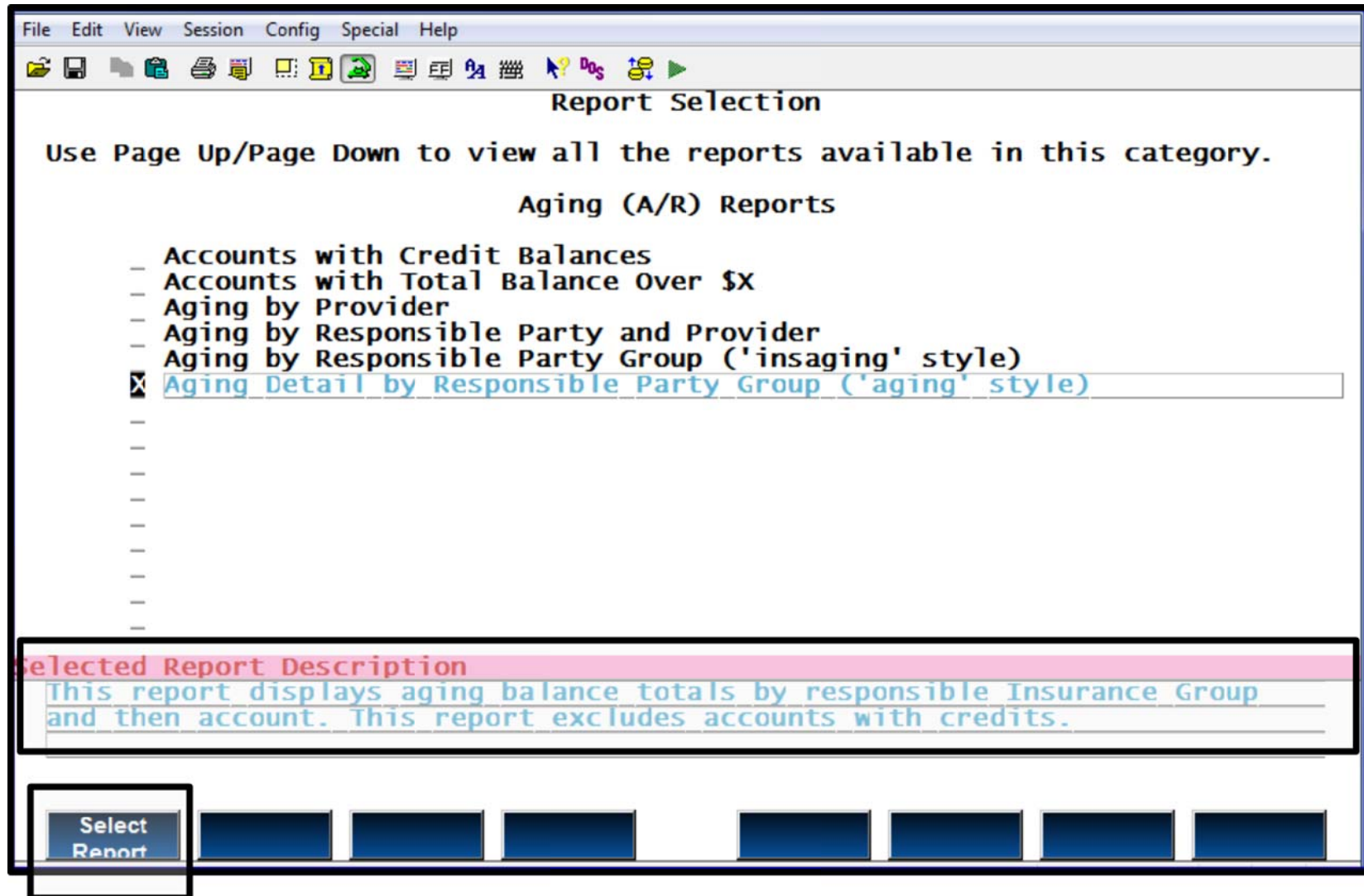
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Report Categories

- 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

Aging (A/R) Reports

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Default Criteria Screen

Summary of Report Criteria

File   Edit   View   Session   Config   Special   Help

Aging Detail by Responsible Party Group ('aging' style)
Description of Restriction Criteria
Press the F8 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.

| Accept Criteria | | | Save As Default | | Save Rpt Criteria | | | Add/Edit Criteria |

Destination Selection
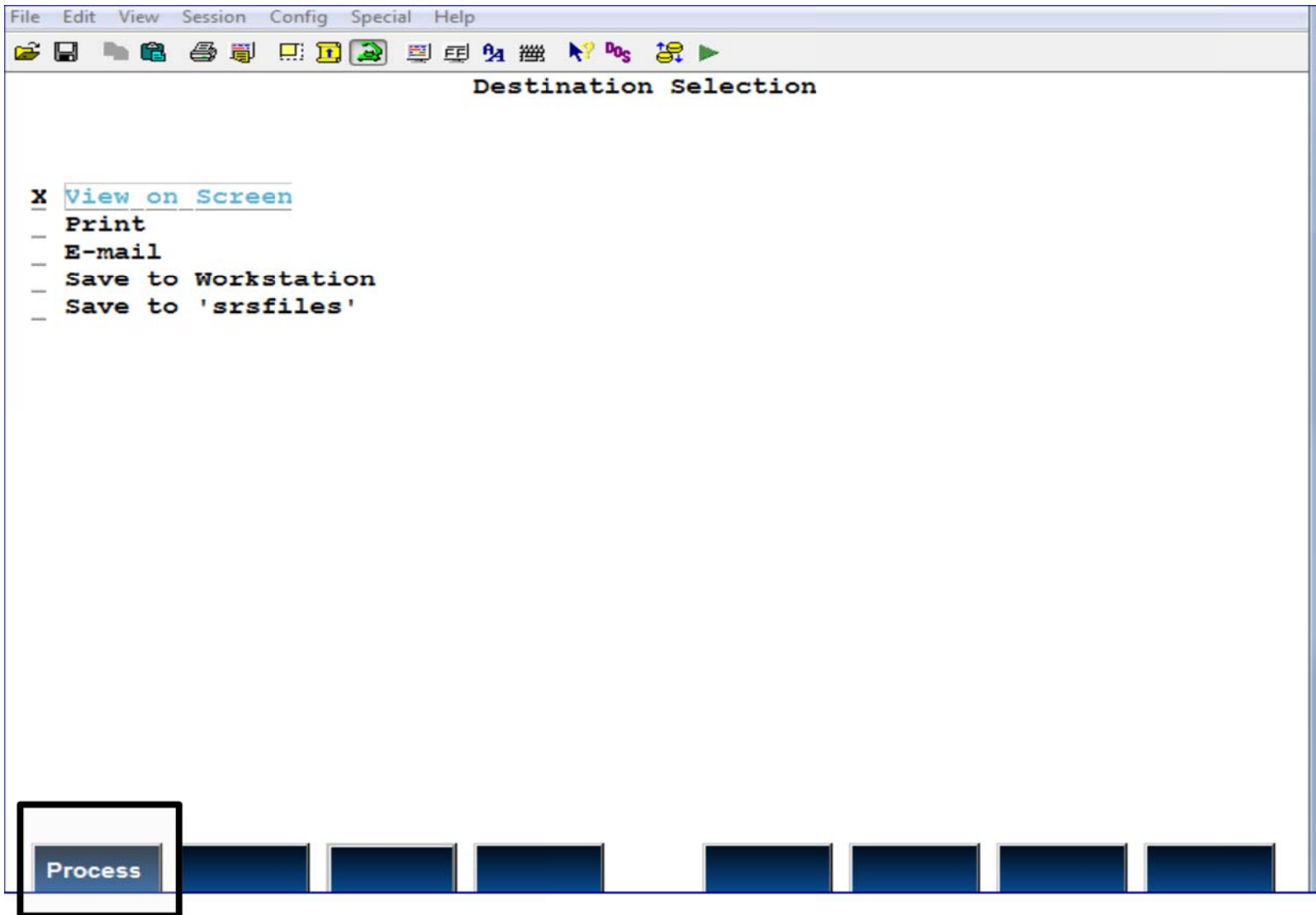
PDF Report Output

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

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

Aging Ins Group Name: HealthyKids HMO

Acct Last Name	Acct First Name	Aging Last Pmt	Aging 0..29	Aging 30..59	Aging 60..89	Aging 90..119	Aging 120+	Aging Total
Jones	Edward	04/30/15	$0.00	$450.00	$0.00	$0.00	$0.00	$450.00
Graybill	Christopher	06/07/15	$0.00	$0.00	$0.00	$0.00	$317.00	$317.00
Swamy	Steven	05/18/15	$175.00	$0.00	$0.00	$0.00	$0.00	$175.00
Depew	Amanda	05/09/15	$0.00	$41.00	$100.30	$0.00	$0.00	$141.30
Horricks	Olga	03/21/15	$0.00	$0.00	$106.00	$0.00	$0.00	$106.00

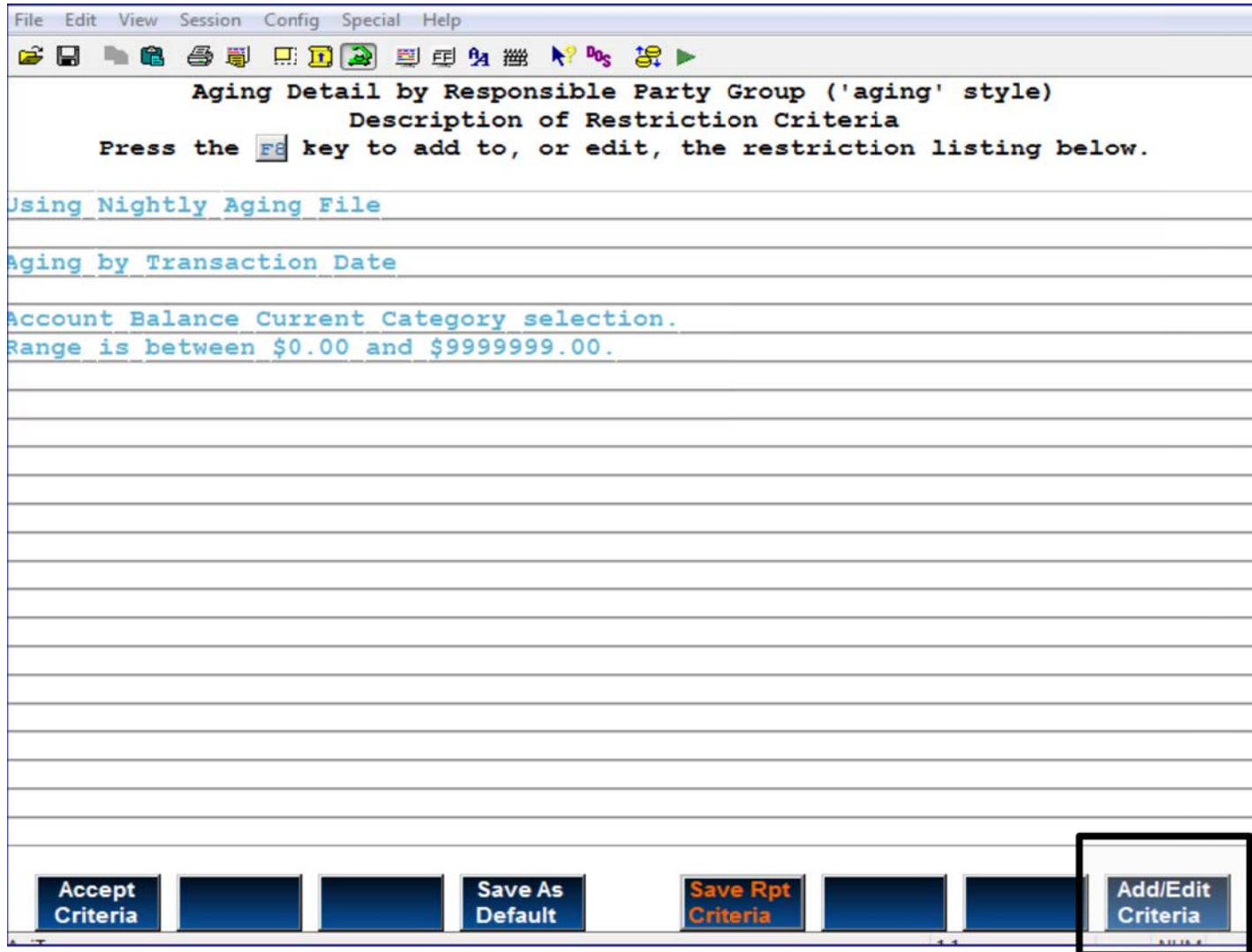PCC Pediatric EHR Solutions

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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

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Add/Edit Criteria

File Edit View Session Config Special Help

Aging Detail by Responsible Party Group ('aging' style)
Description of Restriction Criteria
Press the F6 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.

| Accept Criteria | | | Save As Default | | Save Rpt Criteria | | | Add/Edit Criteria |

To Search Criteria List

Selecting & Adding Criteria

File   Edit   View   Session   Config   Special   Help

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

```
     ACCOUNT Balance Total
     ACCOUNT Budget Amount
     ACCOUNT Date of Last Insurance Payment
 1)  ACCOUNT Date of Last Personal Payment
 2)  ACCOUNT Flag, Exclude if All Flags Match
 3)  ACCOUNT Flag, Exclude if Any Flags Match
 4)  ACCOUNT Flag, Include if All Flags Match
 5)  ACCOUNT Flag, Include if Any Flags Match
 6)  ACCOUNT Select only one account.
 7)  AGING Account Balance 120+ Day Category
 8)
 9)
10)
11)
12)
```

UPPER CASE: Source of the data

Lower Case: Description of the criteria

e.g.   ACCOUNT = Guarantor
          AGING = Aging Files

Accept Criteria

Report Restriction Criteria
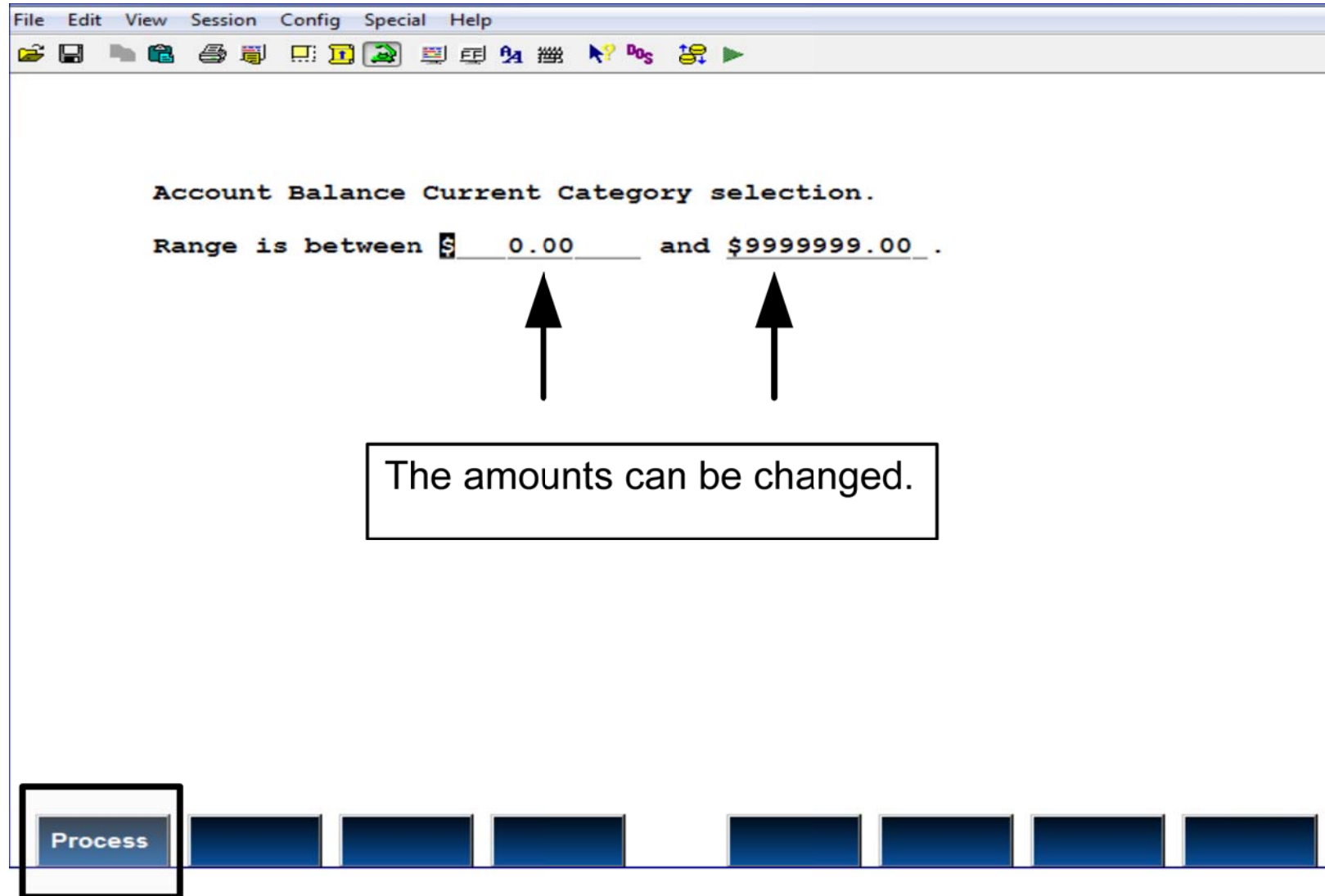

Aging Detail by Responsible Party Group ('aging' style)

REPORT RESTRICTION CRITERIA

Select the restriction criteria for the report.

1) AGING Account Balance Current Category
2) AGING 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.

Process

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Select Second Criteria

Select Providers to Include.

GROUP - Casey (1)
* Elizabeth Casey, M.D.
GROUP - Davidson (1)
    James Davidson, M.D.
GROUP - Gomez (1)
    Kathleen W. Gomez, M.D.
GROUP - Retired (5)
    Beverly Crusher, MD
    Flu
    Leonard McCoy, MD
    None
    Office
GROUP - Williams (18)
    Alfred Woodward, M.D.
    Fred Jones, M.D.
    Mark Williams, M.D.
    Test ProviderEight, M.D.
    Test ProviderEleven, M.D.
    Test ProviderFifteen, M.D.

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

Process | Select | Select All | Select None | List By Group | List By Pattern | | View Selected

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Select Third Criteria

Select Insurance to Include.

```
GROUP - Personal (1)
    Personal
GROUP - Aetna HDHP (1)
    Aetna HDHP
GROUP - Aetna MC & Elect (7)
    Aetna EPO $10 Box  91522
    Aetna EPO $15 Box  91522
    Aetna MC $10 Box 1125
    Aetna MC $15 Box 1125
    Aetna MC $15;Full WC
    Aetna MC $25
    Aetna MC $5 Box 1125
GROUP - Aetna Open (9)
    Aetna PPO $0
    Aetna PPO $10
    Aetna PPO $15
    Aetna PPO $20
    Aetna PPO $25
    Aetna PPO 10%
```

Useful tools:
[F5] List By Group
[F6] List By Pattern

Process | Select | Select All | Select None | List By Group | List By Pattern | View Selected

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Description of Restriction Criteria

```
                 Aging Detail by Responsible Party Group ('aging' style)
                           Description of Restriction Criteria
              Press the F8 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.

Providers:
Elizabeth Casey, M.D.

Insurance:
GROUP - BCBS
```
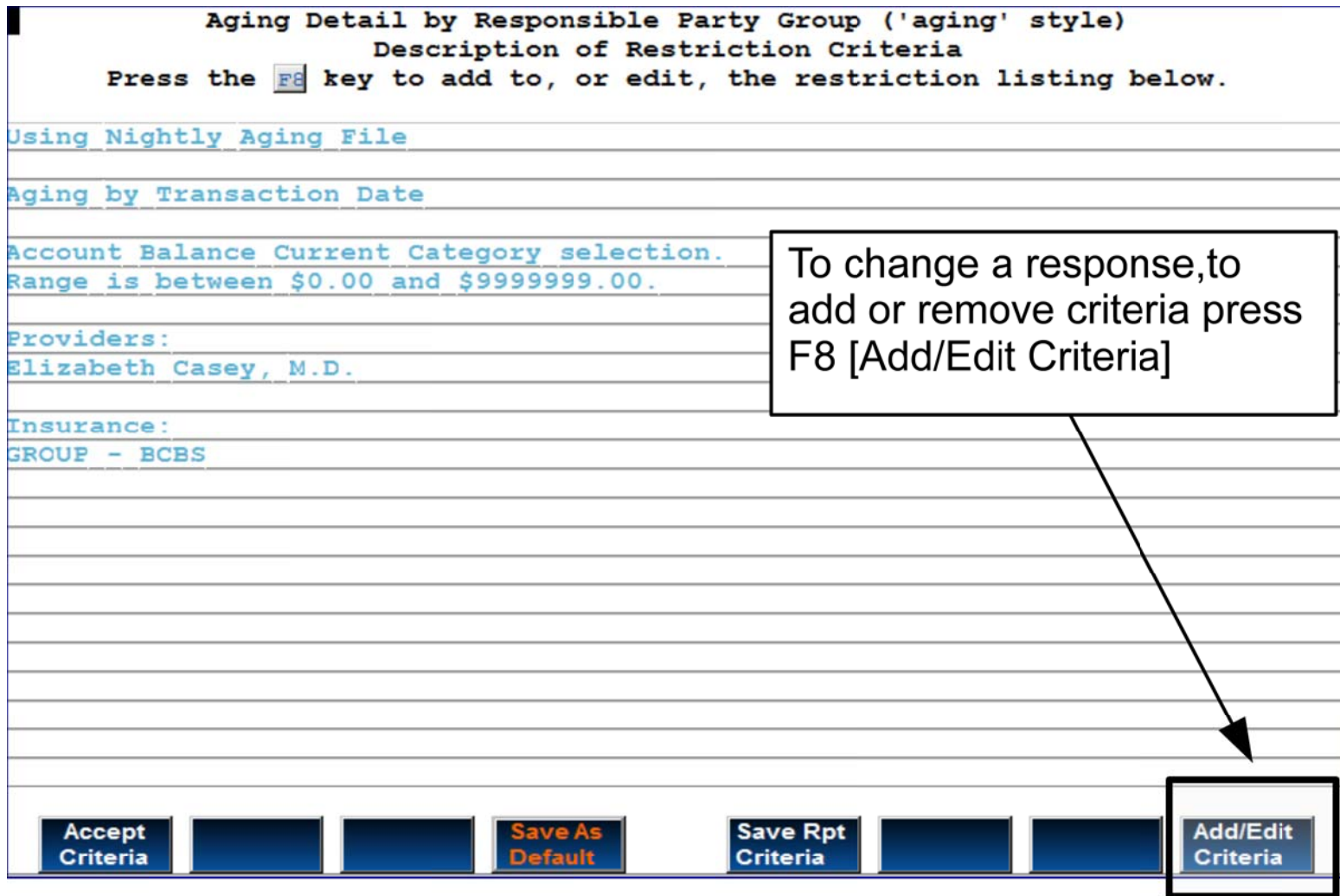
To change a response, to add or remove criteria press F8 [Add/Edit Criteria]

Accept Criteria			Save As Default	Save Rpt Criteria			Add/Edit Criteria

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Save as Default

Aging Detail by Responsible Party Group ('aging' style)
Description of Restriction Criteria
Press the `F8` key to add to, or edit, the restriction listing below.

Using Nightly Aging File

Aging by Transaction Date

Account Balance Current Category selec
Range is between $0.00 and $9999999.00

Providers:
Elizabeth Casey, M.D.

Insurance:
GROUP - BCBS

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 . . .

| Accept Criteria | | | Save As Default | Save Rpt Criteria | | | Add/Edit Criteria |

Save as Report Criteria

Aging Detail by Responsible Party Group ('aging' style)
Description of Restriction Criteria
Press the `F8` 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.

Providers:
Elizabeth Casey, M.D.

Insurance:
GROUP - BCBS

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

Accept Criteria			Save As Default	Save Rpt Criteria			Add/Edit Criteria

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Naming and Saving Report Criteria

```
                        SAVING FILE

     Please enter a description for the save file:
     ▮CBS, 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...

Process

Restoring Report Criteria

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

Aged How?
X Transaction Date
_ Posting Date
_ Payor Date

Aged as of what date?
X Nightly File
_ Existing File for: 06/14/15
_ Regenerate as of: 06/19/15   *

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

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

| Generate Report | | | | | | | | Restore Criteria |

Report Restore Selection

Report Restore Selection
Use PgUp/PgDown keys to view more saved report runs.

Save Date: 06/12/15   Save Time: 12:50AM   By: mch
Save Description:
Dr. Casey and BCBS

Save Date: 06/12/15   Save Time: 01:40PM   By: mch
Save Description:
Davidson
Aetna USHC HMO & Cigna

Save Date:
Save Description:

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 . . .

Restore File   Delete File

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Customized vs Standard Report

Customized report

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

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Thanks for attending.
Happy reporting!!!!