

Take Control With Reports

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Maria Horn
July 17, 2014
8:30-11:45 am

Goals

- Help you get familiar with PCC's reporting tools
- Where to find reports
- What the reports mean
- How to leverage reports for the good of your practice

Agenda

- 8:30 – 10:15 Practice Oversight Reports and Dashboard presentation
- 10:15 – 10:30 Q&A Session
- 10:30 – 10:45 Break
- 10:45 – 11:45 Practice Session

Primary Oversight Goal

To ensure that the practice is functioning and running well so that the primary mission of providing excellent patient care happens seamlessly.



Pediatric EHR Solutions

Control Your Future™

Financial & Operational Oversight Reports

Daily Reports

- Collection Worksheet for Appointments
- dailycheck
- daysheet
- deposit
- srs Payment Reports
- ecsreports
- erareports

Collection Worksheet for Appointments

Provider of Service: Edward V. Clarence, M.D. Place of Service: Pediatric Associates of Winooski Falls

Date	Time	Patient Name	Personal Due	Comments	Today's Charges	Total Owed	Total Collected	Init
06/30/14	2:00pm	Bell, Byron P	\$ 79.93					
06/30/14	2:20pm	Bell, Cameron C	\$ 79.93					
06/30/14	3:00pm	Medeiros, Logan	\$ 49.96					
06/30/14	4:00pm	Novo, Jacob J	\$ 30.00					



dailycheck

DAILY CHECK

Include Charges:
Transacted on Jun 23, 2014

Place of Service:
All Places of Service

Provider:
All Servicing Providers

Report Detail:
Brief with All EEF Items

Sort Report by:
Patient Name

Send Report to:
_ Screen
_ Printer
 Interactive Screen

All EEF Items
No EEF Items
Only EEF Items Added After Checkout

Patient Name
Provider then Patient Name
POS then Patient Name
POS, Provider, then Patient Name
Time of Posting

Generate Report

AniTa 6:21 NUM



Interactive dailycheck

DAILYCHECK INTERACTIVE SCREEN						
Use the PgUp and PgDn keys to scroll through this information.						
DAILY TRANSACTION LOG FOR CHARGES POSTED ON 06/26/14						
ALL PLACES OF SERVICE						
PROVIDER: M						
REPORT DETAIL: Brief, All EEF Items						
SORT ORDER: Time of posting						
PRV	PROCEDURE	DIAGNOSIS	INSURANCE	AMOUNT	COPAY	
X	PATIENT: Jackson Brown (14 yrs, 6 mos 12/17/99 M)					
	POS: Allergy					
	DATE: 06/25/14					
M	RemovalForeign/Skin	Foreign Body Skin/S	Bfed25	300.00	25.00	
	TOTAL			300.00	25.00	
ELECTRONIC ENCOUNTER FORM						
	PROCEDURES	DIAGNOSES				
	RemovalForeign/Skin	Foreign Body Skin/Soft Tissue				
Show MoreInfo	Hide MoreInfo	WorkWith Entry	New Pattern	Next Match	Previous Match	Bop To Top



Dates in Partner

Which date do you use and why?

- Transaction date
 - Date of Service
 - Date of Deposit/EFT/Check
- Posting date
 - Date of entry of charges, payments, or adjustments into Partner



daysheet

File Edit View Session Config Special Help

DAY SHEETS Page 1 of 1

For Posting Dates from: **06/25/14** to **06/25/14**

Send report to: Printer **Screen** Report Width: Wide **Narrow**

Totals Only? **No** Subtotal through sort level:

All Providers? **Yes** Page break through sort level:

All Users? **Yes** Show month to date totals? **No**

All Locations? **Yes** Narrow: Show patient names? **No**

Omit relinks? **No**

Sort By

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Restricted to Transaction Dates from: _____ to _____

Generate Report

AniTa 33:3 NUM



deposit

File Edit View Session Config Special Help

DEPOSIT SLIPS Page 1 of 1

For Posting Dates from: 06/25/14 to 06/25/14

Send report to: Printer Report Width: Wide
 Screen Narrow

Totals Only? No Subtotal through sort level: 2
All Providers? Yes Page break through sort level: 0
All Users? Yes Only items for date of posting? No
All Locations? Yes Narrow: Show patient names? Yes
All Payment Types? Yes *Omit relinks? Yes

Sort By

1. Class of Payment
2. Type of Payment
3. _____
4. _____
5. _____
6. _____

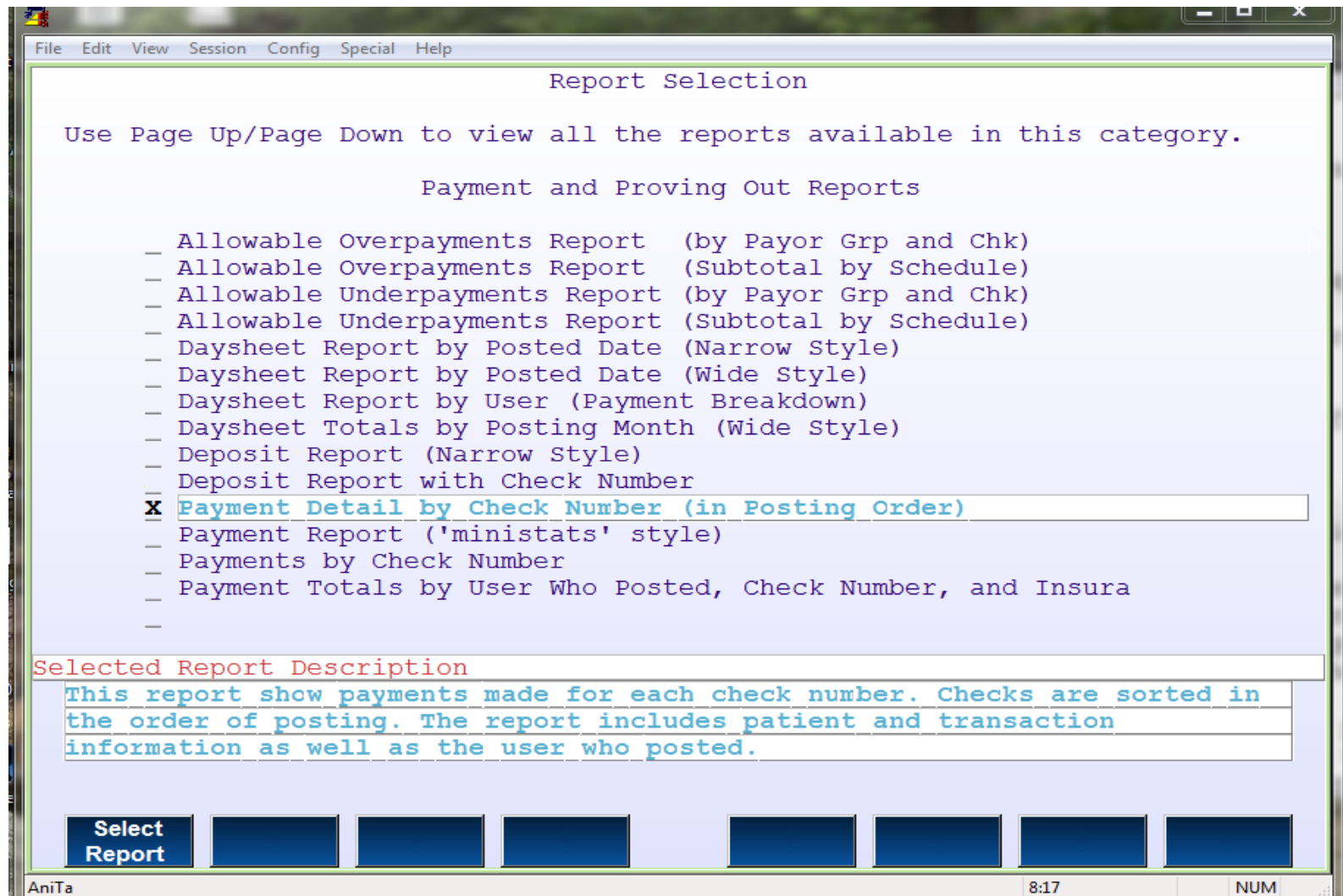
Restricted to Transaction Dates from: _____ to _____

* Note: If proving out by provider "Omit relinks" should be set to "No".

Generate Report [] [] [] [] [] [] [] []

AniTa 33:3 NUM

srs Payment Reports



ecsreports

File Edit View Session Config Special Help				
EDI Reports - Listing All Report Types				
31939 files are listed below.				Times Printed
06/25/2014				
<input checked="" type="checkbox"/>	Anthem Level 2 Status Report	ECS	3:15pm	0
<input type="checkbox"/>	ERA/EOB Report	ERA/EOB	2:45pm	0
<input type="checkbox"/>	Post-N-Track Claims Report	ECS	1:15pm	0
<input type="checkbox"/>	Emdeon File Status Report	ECS	12:30pm	0
<input type="checkbox"/>	PCC Daily Submission Summary	ECS	11:57am	0
<input type="checkbox"/>	ERA/EOB Report	ERA/EOB	11:15am	0
<input type="checkbox"/>	ERA/EOB Report	ERA/EOB	11:15am	0
<input type="checkbox"/>	Post-N-Track Claim Acknowledgment Report	ECS	11:15am	0
<input type="checkbox"/>	PCC Daily Submission Summary	ECS	9:50am	0
<input type="checkbox"/>	UHC Health Care Claim Acknowledgment Rep	ECS	9:45am	0
<input type="checkbox"/>	ERA/EOB Report	ERA/EOB	9:30am	0
<input type="checkbox"/>	PCC Daily Submission Summary	ECS	9:15am	0
<input type="checkbox"/>	ECS Batch Log	ECS	8:56am	0
<input type="checkbox"/>	preptags/tagssplit Bad Claims	ECS	8:55am	0
<input type="checkbox"/>	Eligibility Report	Eligibility	7:59am	0
<input type="checkbox"/>	UHC Health Care Claim Acknowledgment Rep	ECS	7:45am	0
<input type="checkbox"/>	Capario Daily Verification Report	ECS	7:16am	0
<input type="checkbox"/>	Capario Payor Response Report	ECS	7:16am	0
<input type="checkbox"/>	Availity Electronic Batch Report	ECS	5:47am	0
<input type="checkbox"/>	PCC Daily Submission Summary	ECS	1:30am	0
<input type="checkbox"/>	PCC Daily Submission Summary	ECS	1:00am	0

- View Selected
- Print Selected
- Select None
- Essentl Reports
- Search Selected
- Search Recent
- List By Type



Weekly Reports

- Claim Reports
 - Error Message Reports
 - Unpaid acknowledged reports
 - Never or number of times submitted
- Collection Reports
 - Copay Collection Report
 - daysheet/deposit
 - Payment Reports
- Appointment Status Report

Billing & Collection Reports

Report Selection

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

Billing and Collection Reports

- Accounts with Credit Balances
- Billing Report by Family
- Billing Report by Responsible Party
- Claim Acknowledgement Report (Proxymed/Emdeon Only)
- Claim Error Report (preptags/Proxymed/Emdeon Claims)
- Claims First Submitted Over X Days Ago
- Claims Last Submitted Over X Days Ago
- Claims Never Submitted (Sorted by Account)
- Claims Never Submitted (Sorted by Payor Group)
- Claims Submitted Over X Times
- Claim Status Report (Totals Only)
- Collection Worksheet for Appointments ('apptsheet' style)
- Copay Collection Ratio
- CPT Codes Sorted by Total Number of Procedures Charged
- Gross Collection Ratio Report

Selected Report Description

A list of claims with the status of "Not Rejected by the Clearing house or Payor" and billing status date of 21 days or more. This report only works for Proxymed and Emdeon Claims.

Select
Report



Percent of Copays Collected

File Edit View Session Config Special Help

Copay Collection Ratio pcc 06/25/2014 16:56:04

Transaction Date	Copay	Amount of Copay Paid	Copay Collection Ratio
06/16/14	\$40.00	\$0.00	0.00%
06/18/14	\$85.00	\$0.00	0.00%
06/20/14	\$37.00	\$37.00	100.00%
06/23/14	\$2.00	\$0.00	0.00%
06/24/14	\$37.00	\$0.00	0.00%
	\$201.00	\$37.00	18.41%

Criteria for this report run.
Transaction Date Range: 06/15/14 - 06/24/14

Charge Copay Amount selection.
Range is between \$1.00 and \$9999999.00.


Done Jump to Top Jump to Bottom Send To... Search Pattern

AniTa 1:1 NUM

Technically not "collected at TOS" but close if you run this each week.

Consider the Appointment Collection Report

Appointment Totals by Status

Appointment Totals by Status 	
Appt Current Status	Number of Appts
Chg Posted	358
Missed	8
Cancelled	52
Checked In	19
	437

- Missed about 4% (2012 PCC client data)
- Billed appointments are “Chg Posted”
- Identify missed appointment
- Rescheduled is a canceled appointment

Monthly Reports

- Financial indicators
 - Aging reports
 - Follow-up reports
 - Charges, payments, & adjustments
 - Allowables
- New patients
- Visit Reports
- Productivity Reports

Practice Vitals Dashboard

Dashboard Highlights

- Financial and clinical overview of your practice
- Also allows for more detailed analysis
- Customized for your practice
- Data is updated monthly
- Includes state, regional, and national pediatric benchmarks
- Benchmarks are based on PCC client pediatric data