Take Control With Reports

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

PCC Pediatric EHR Solutions

Control Your Future™

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.

Financial & Operational Oversight Reports

Daily Reports

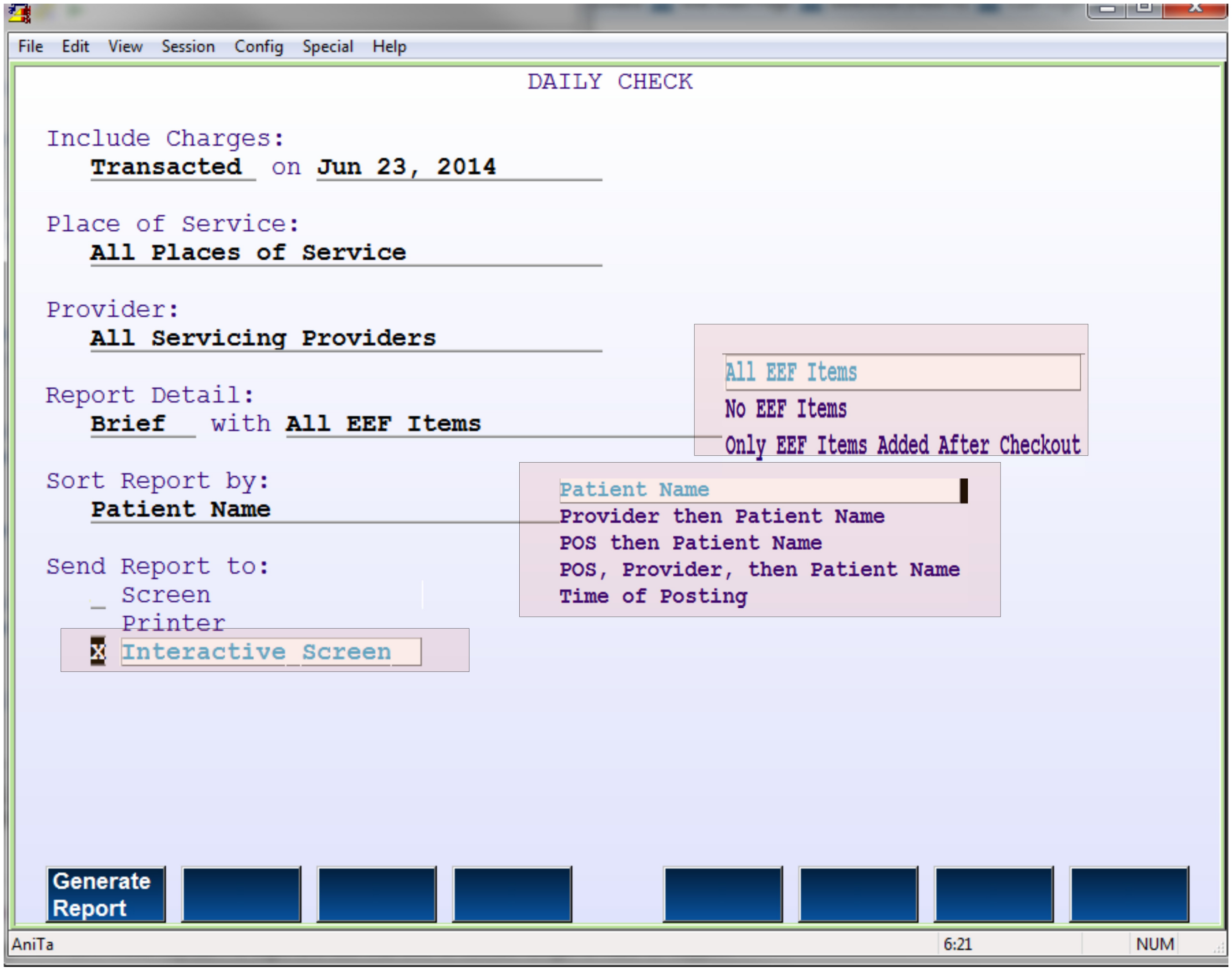
- Collection Worksheet for Appointments
- dailycheck
- daysheet
- deposit
- srs Payment Reports
- ecsreports
- erareports

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



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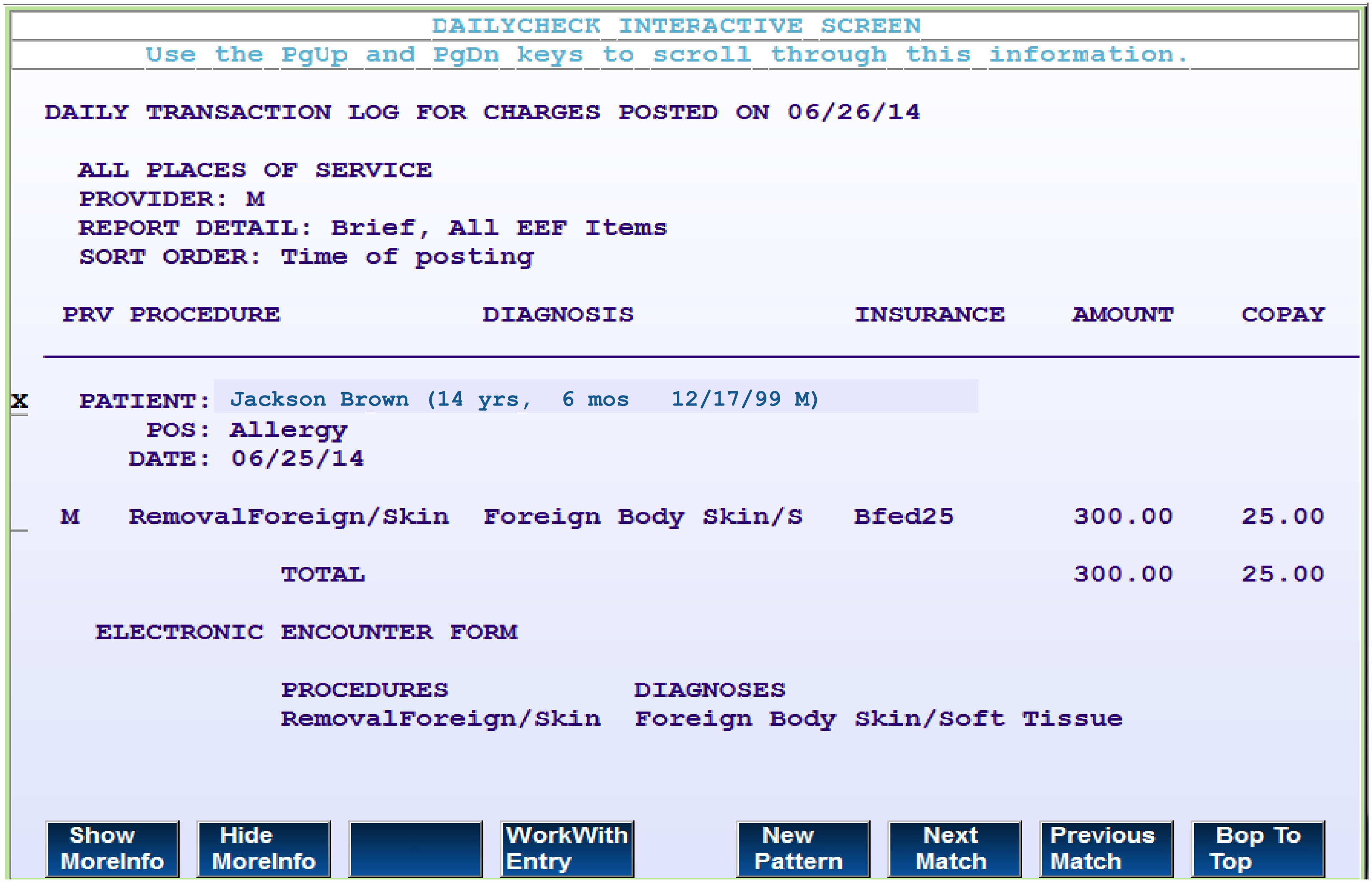
Interactive dailycheck

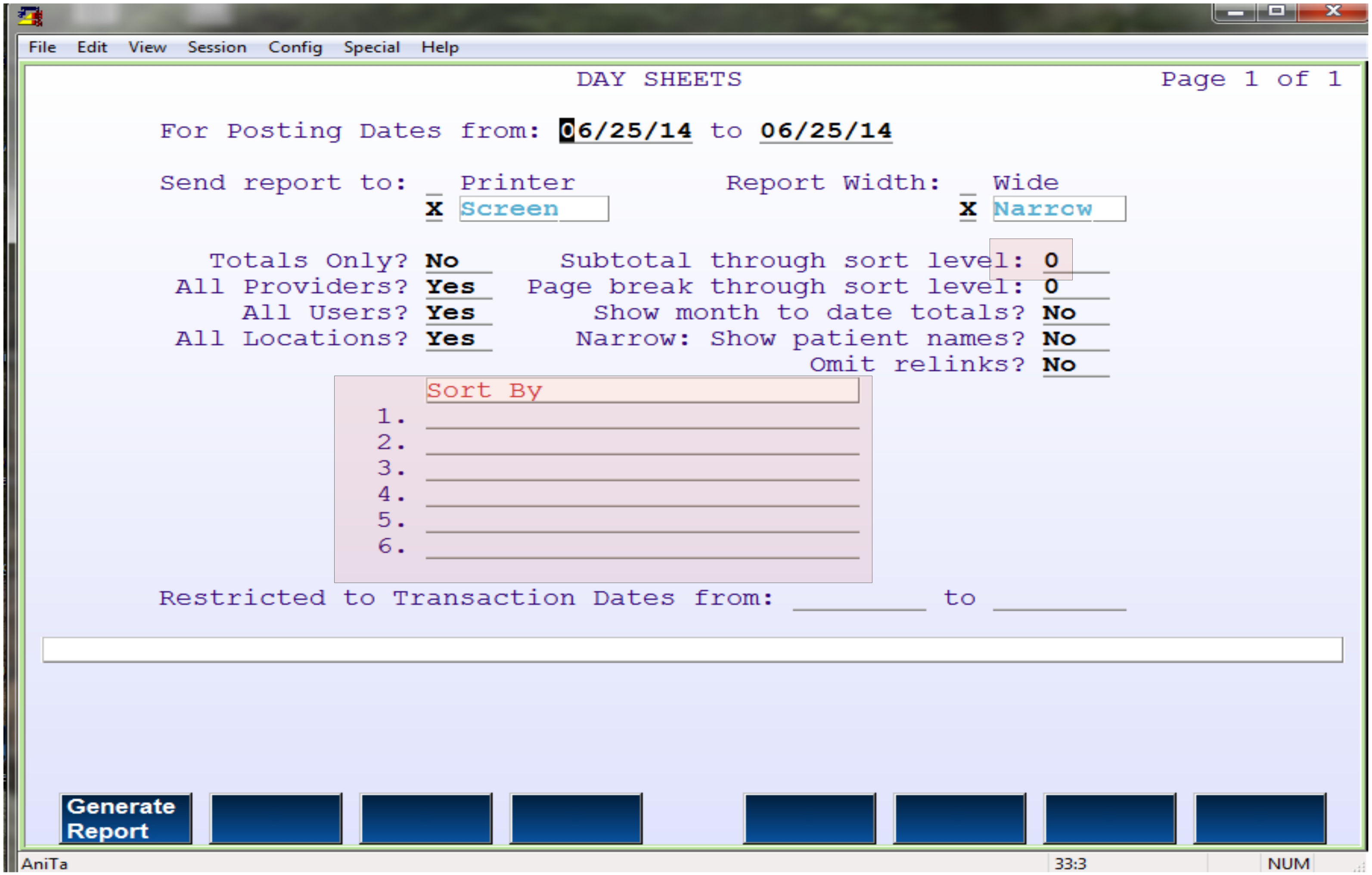


Dates in Partner

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



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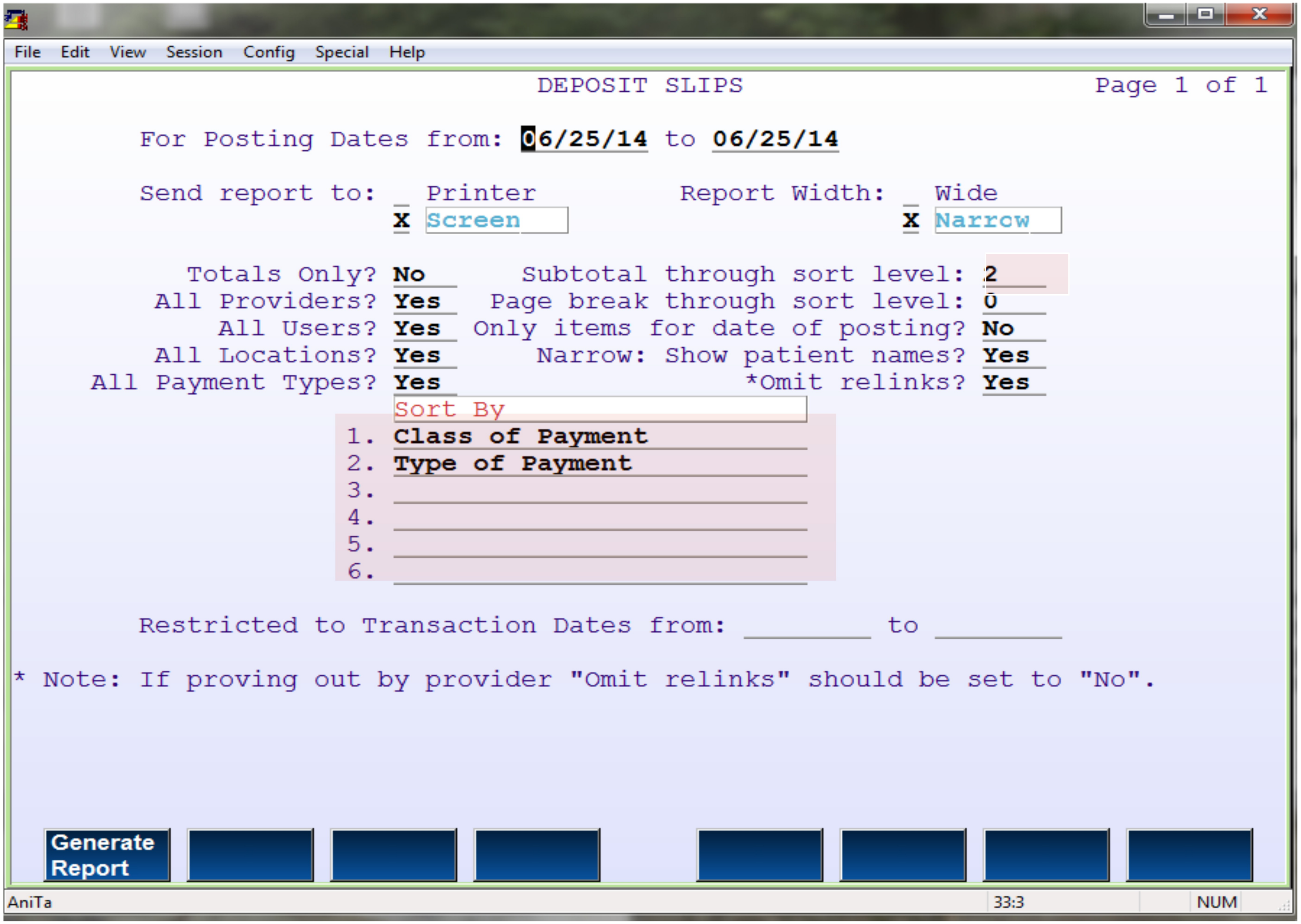
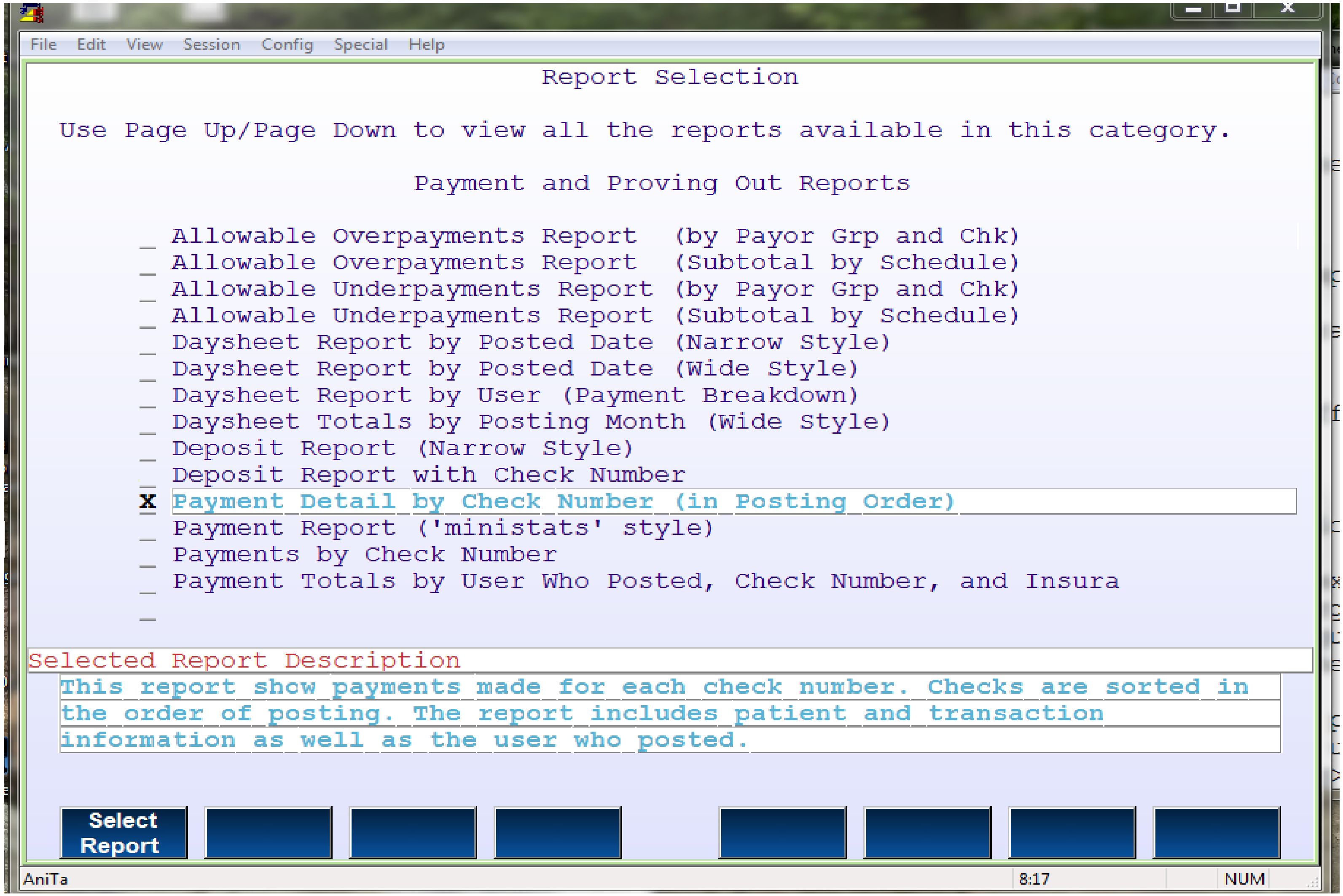
deposit


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
X Screen
Report Width: _ Wide
X Narrow
Totals Only? No
All Providers? Yes
All Users? Yes
All Locations? Yes
All Payment Types? Yes
Subtotal through sort level: 2
Page break through sort level: 0
Only items for date of posting? No
Narrow: Show patient names? 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.

06/25/2014

				Times Printed
█	Anthem Level 2 Status Report	ECS	3:15pm	0
_	ERA/EOB Report	ERA/EOB	2:45pm	0
_	Post-N-Track Claims Report	ECS	1:15pm	0
_	Emdeon File Status Report	ECS	12:30pm	0
_	PCC Daily Submission Summary	ECS	11:57am	0
_	ERA/EOB Report	ERA/EOB	11:15am	0
_	ERA/EOB Report	ERA/EOB	11:15am	0
_	Post-N-Track Claim Acknowledgment Report	ECS	11:15am	0
_	PCC Daily Submission Summary	ECS	9:50am	0
_	UHC Health Care Claim Acknowledgment Rep	ECS	9:45am	0
_	ERA/EOB Report	ERA/EOB	9:30am	0
_	PCC Daily Submission Summary	ECS	9:15am	0
_	ECS Batch Log	ECS	8:56am	0
_	preptags/tagsplit Bad Claims	ECS	8:55am	0
_	Eligibility Report	Eligibility	7:59am	0
_	UHC Health Care Claim Acknowledgment Rep	ECS	7:45am	0
_	Capario Daily Verification Report	ECS	7:16am	0
_	Capario Payor Response Report	ECS	7:16am	0
_	Availity Electronic Batch Report	ECS	5:47am	0
_	PCC Daily Submission Summary	ECS	1:30am	0
_	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

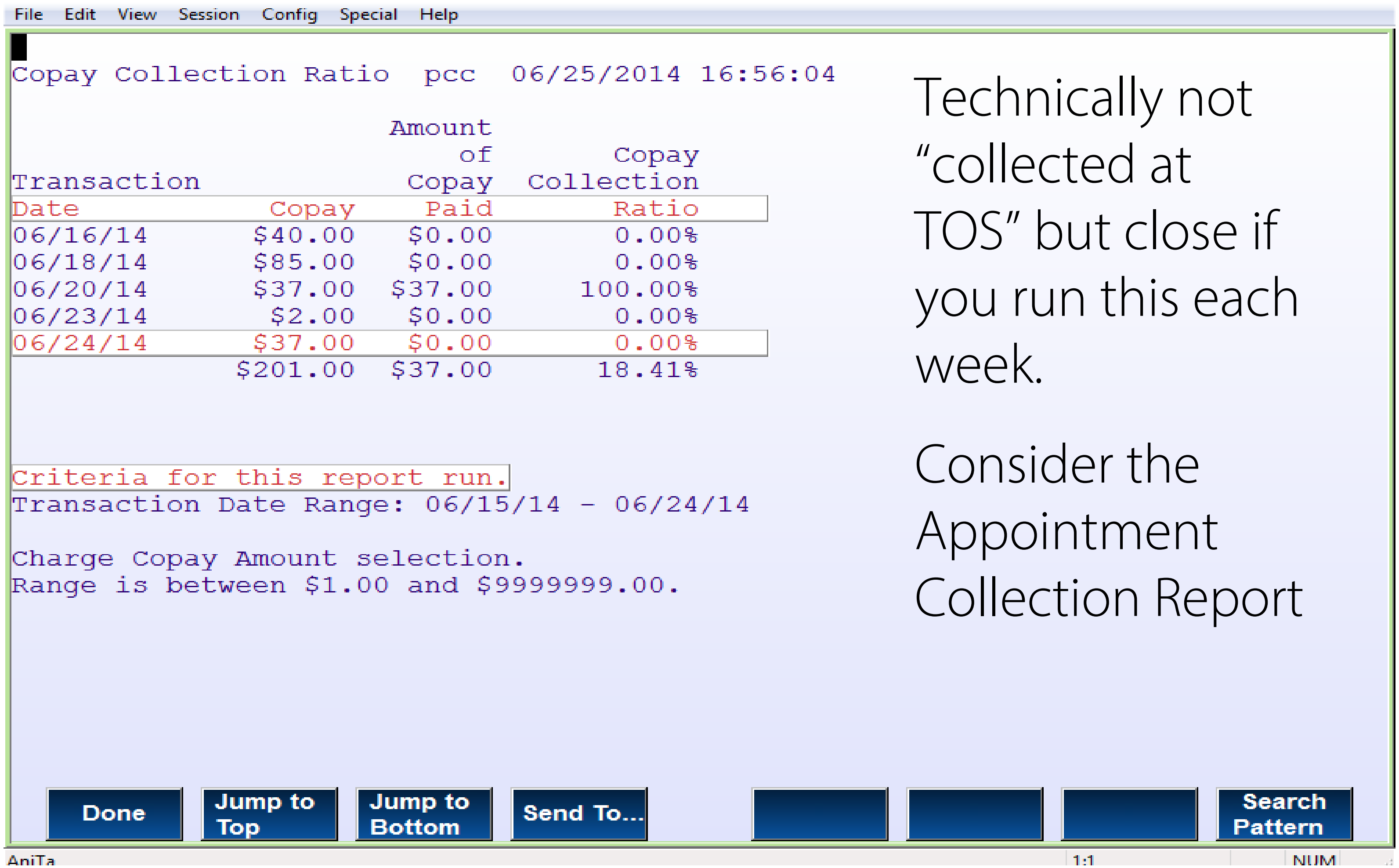
- _ Accounts with Credit Balances
- _ Billing Report by Family
- _ Billing Report by Responsible Party
- X Claim Acknowledgement Report (Proxymed/Emdeon Only)
- _ Claim Error Report (preptags/Proxymed/Emdeon Claims)
- _ Claims First Submitted Over X Days Ago
- _ Claims Last Submitted Over X Days Ago
- _ 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



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