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

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Patient Name</th>
<th>Personal Due</th>
<th>Comments</th>
<th>Today’s Charges</th>
<th>Total Owed</th>
<th>Total Collected Init</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/30/14</td>
<td>2:00pm</td>
<td>Bell, Byron P</td>
<td>$ 79.93</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/30/14</td>
<td>2:20pm</td>
<td>Bell, Cameron C</td>
<td>$ 79.93</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/30/14</td>
<td>3:00pm</td>
<td>Medeiros, Logan</td>
<td>$ 49.96</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/30/14</td>
<td>4:00pm</td>
<td>Novo, Jacob J</td>
<td>$ 30.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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:
Interactive Screen

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

Generate Report
### 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

<table>
<thead>
<tr>
<th>PRV PROCEDURE</th>
<th>DIAGNOSIS</th>
<th>INSURANCE</th>
<th>AMOUNT</th>
<th>COPAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Removal Foreign/Skin Foreign Body Skin/S S Bfed25</td>
<td></td>
<td>300.00</td>
<td>25.00</td>
</tr>
</tbody>
</table>

**TOTAL**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th>300.00</th>
<th>25.00</th>
</tr>
</thead>
</table>

**ELECTRONIC ENCOUNTER FORM**

**PROCEDURES**  
Removal Foreign/Skin

**DIAGNOSES**

Foreign Body Skin/Soft Tissue
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
Report Selection

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

Payment and Proving Out Reports

- Allowable Overpayments Report (by Payor Grp and Chk)
- Allowable Overpayments Report (Subtotal by Schedule)
- Allowable Underpayments Report (by Payor Grp and Chk)
- Allowable Underpayments Report (Subtotal by Schedule)
- Daysheet Report by Posted Date (Narrow Style)
- Daysheet Report by Posted Date (Wide Style)
- Daysheet Report by User (Payment Breakdown)
- Daysheet Totals by Posting Month (Wide Style)
- Deposit Report (Narrow Style)
- Deposit Report with Check Number
- Payment Detail by Check Number (in Posting Order)
- Payment Report ('minisstats' style)
- Payments by Check Number
- Payment Totals by User Who Posted, Check Number, and Insura

Selected Report Description

This report show payments made for each check number. Checks are sorted in the order of posting. The report includes patient and transaction information as well as the user who posted.
<table>
<thead>
<tr>
<th>Report Type</th>
<th>Frequency</th>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/25/2014 Anthem Level 2 Status Report</td>
<td>ECS</td>
<td>3:15pm</td>
<td>0</td>
</tr>
<tr>
<td>ERA/EOB Report</td>
<td>ERA/EOB</td>
<td>2:45pm</td>
<td>0</td>
</tr>
<tr>
<td>Post-N-Track Claims Report</td>
<td>ECS</td>
<td>1:15pm</td>
<td>0</td>
</tr>
<tr>
<td>Emdeon File Status Report</td>
<td>ECS</td>
<td>12:30pm</td>
<td>0</td>
</tr>
<tr>
<td>PCC Daily Submission Summary</td>
<td>ECS</td>
<td>11:57am</td>
<td>0</td>
</tr>
<tr>
<td>ERA/EOB Report</td>
<td>ERA/EOB</td>
<td>11:15am</td>
<td>0</td>
</tr>
<tr>
<td>ERA/EOB Report</td>
<td>ERA/EOB</td>
<td>11:15am</td>
<td>0</td>
</tr>
<tr>
<td>Post-N-Track Claim Acknowledgment Report</td>
<td>ECS</td>
<td>11:15am</td>
<td>0</td>
</tr>
<tr>
<td>PCC Daily Submission Summary</td>
<td>ECS</td>
<td>9:50am</td>
<td>0</td>
</tr>
<tr>
<td>UHC Health Care Claim Acknowledgment Rep</td>
<td>ECS</td>
<td>9:45am</td>
<td>0</td>
</tr>
<tr>
<td>ERA/EOB Report</td>
<td>ERA/EOB</td>
<td>9:30am</td>
<td>0</td>
</tr>
<tr>
<td>PCC Daily Submission Summary</td>
<td>ECS</td>
<td>9:15am</td>
<td>0</td>
</tr>
<tr>
<td>ECS Batch Log</td>
<td>ECS</td>
<td>8:56am</td>
<td>0</td>
</tr>
<tr>
<td>preptags/tagsplit Bad Claims</td>
<td>ECS</td>
<td>8:55am</td>
<td>0</td>
</tr>
<tr>
<td>Eligibility Report</td>
<td>Eligibility</td>
<td>7:59am</td>
<td>0</td>
</tr>
<tr>
<td>UHC Health Care Claim Acknowledgment Rep</td>
<td>ECS</td>
<td>7:45am</td>
<td>0</td>
</tr>
<tr>
<td>Capario Daily Verification Report</td>
<td>ECS</td>
<td>7:16am</td>
<td>0</td>
</tr>
<tr>
<td>Capario Payor Response Report</td>
<td>ECS</td>
<td>7:16am</td>
<td>0</td>
</tr>
<tr>
<td>Availity Electronic Batch Report</td>
<td>ECS</td>
<td>5:47am</td>
<td>0</td>
</tr>
<tr>
<td>PCC Daily Submission Summary</td>
<td>ECS</td>
<td>1:30am</td>
<td>0</td>
</tr>
<tr>
<td>PCC Daily Submission Summary</td>
<td>ECS</td>
<td>1:00am</td>
<td>0</td>
</tr>
</tbody>
</table>
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.
Percent of Copays Collected

<table>
<thead>
<tr>
<th>Date</th>
<th>Copay</th>
<th>Paid</th>
<th>Collection</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/16/14</td>
<td>$40.00</td>
<td>$0.00</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>06/18/14</td>
<td>$85.00</td>
<td>$0.00</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>06/20/14</td>
<td>$37.00</td>
<td>$37.00</td>
<td>100.00%</td>
<td></td>
</tr>
<tr>
<td>06/23/14</td>
<td>$2.00</td>
<td>$0.00</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td>06/24/14</td>
<td>$37.00</td>
<td>$0.00</td>
<td>0.00%</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$201.00</strong></td>
<td><strong>$37.00</strong></td>
<td><strong>18.41%</strong></td>
<td></td>
</tr>
</tbody>
</table>
Appointment Totals by Status

<table>
<thead>
<tr>
<th>Appt Current Status</th>
<th>Number of Appts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chg Posted</td>
<td>358</td>
</tr>
<tr>
<td>Missed</td>
<td>8</td>
</tr>
<tr>
<td>Cancelled</td>
<td>52</td>
</tr>
<tr>
<td>Checked In</td>
<td>19</td>
</tr>
<tr>
<td>Total</td>
<td>437</td>
</tr>
</tbody>
</table>

- 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
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