

# Advanced Reporting Workshop

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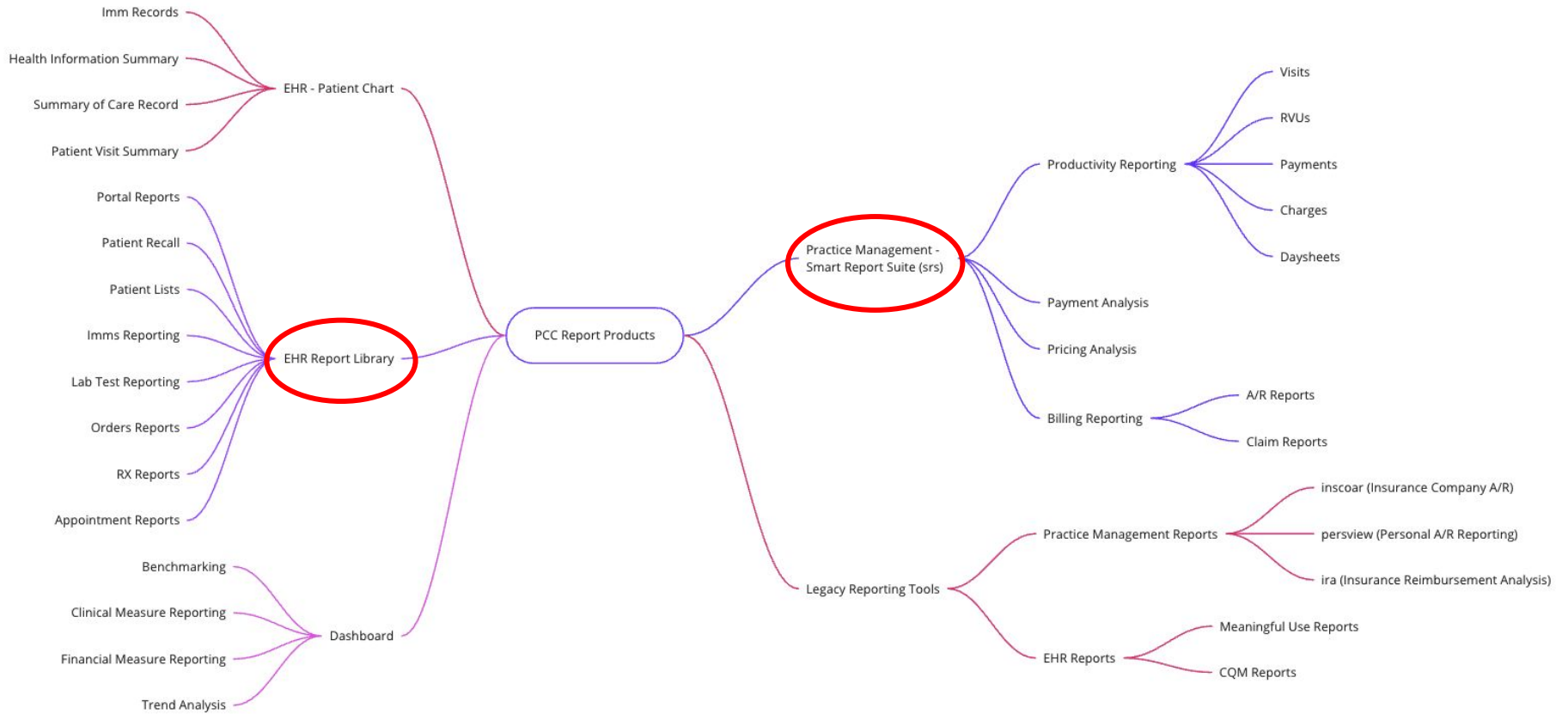
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# Agenda

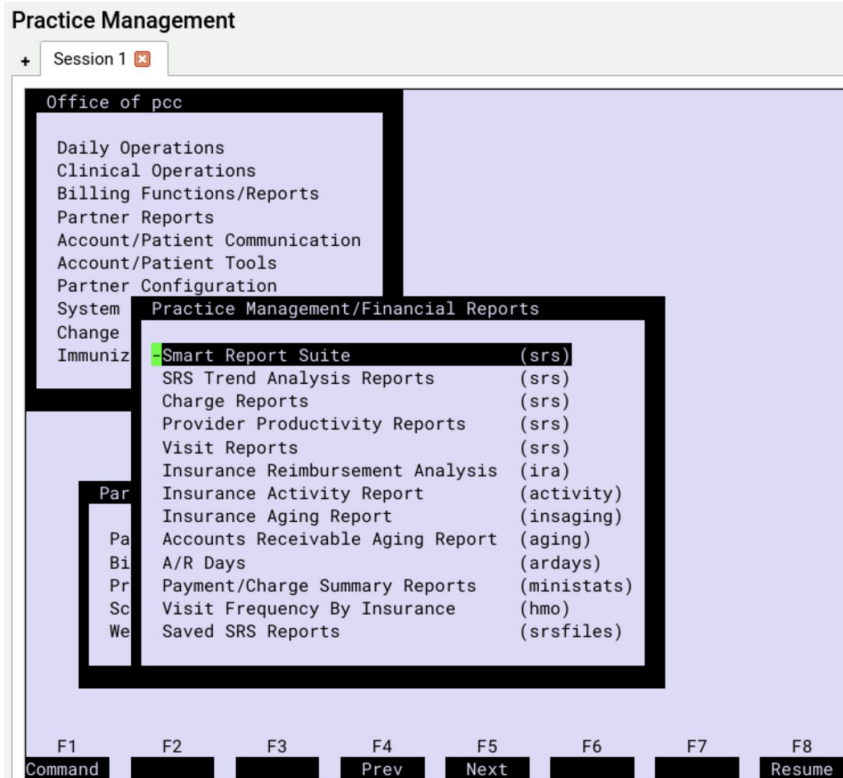
1. 10:00 - 11:15 - Presentation on reporting tools: Smart Report Suite (srs) and the EHR Report Library
2. 11:15 - 12:00 - Reporting Workshop

# Session Goals

1. Understanding of reporting tools within PCC PM and PCC EHR and how they can be used to meet your financial and clinical reporting needs
2. Experience using these tools to build and customize reports relevant to your practice



# Smart Report Suite



- Versatile and stable Practice Mgt reporting tool
- Use srs for reporting on productivity data (visits, charges, payments, RVUs)
- It can be a lot of trial and error when creating reports. Support can help!

# Five Common Productivity Report Data Sources in srs

1. Daysheet-based reports
2. Charge-based reports
3. Payment-based reports
4. Visit-based reports
5. RVU-based reports

# Daysheet-based reports

## Report Generation - Step 1

Identify the kind of report to create.

Please select the kind of report that should be generated.

- Charge report with collection information (all valid charges)
- Payment report
- Daysheet report
- Deposit report with payment details and no charge information
- Appointment report
- Per-visit charge report with collection information
- Aging report
- Charge report with billing/submission info (only charges with balances)
- Patient insurance policy report
- Procedure Table Listing
- Insurance Table Listing
- Patient demographic information
- RVU report
- Diagnosis Table Listing
- Billing History Statistics
- Deleted Charges
- Claim Adjustment Reason Code (CARC)

# Daysheet-based reports

- Based on daily transaction logs of charges, payments, adjustments, and refunds.
- Best report for reflecting overall charges, payments, adjustments, and refunds attributed to a specified time period, by provider if desired.
- Can be useful for provider productivity reporting
- Very limited detail (no detail on CPT code/name, payment types, etc)



# Daysheet-based reports

- Can be useful for reconciling to bank account deposits
- Limitations:
  - No CPT code detail: Can't show "provider charges for everything excluding vaccines" for example
  - Cannot show totals by place of service

# Example: Provider Productivity

Let's create a custom report to show provider charge, payment, adj, and refund totals posted in a given month. We're looking for report output like this:

Provider charges, payments, adjustments (daysheet)								
Service Provider Name	Non Service Charges	Service Charges	Adj	Cash	Check	Credit Card	Refund	Total Pmts
Elizabeth Casey, M.D.	\$0.00	\$0.00	\$0.00	\$0.00	\$40.00	\$50.00	\$-20.00	\$70.00
James Davidson, M.D.	\$0.00	\$260.00	\$19.53	\$0.00	\$262.84	\$50.00	\$-262.84	\$50.00
None	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$-120.00	\$0.00	\$-120.00
Office	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	\$20.00
	\$0.00	\$260.00	\$19.53	\$0.00	\$302.84	\$0.00	\$-282.84	\$20.00

Criteria for this report run.  
Posting Date Range: 01/01/19 - 04/30/20

Includes Relinked Payments and Adjustments

# Transaction vs Posting Dates

## Transaction Date

- For charges, this is the date of service
- For payments, this is the date attributed to the payment.
  - For insurance payments, this is typically the date of the check
  - For other payments, it's the date entered by the user

## Posting Date

- For charges and payments, this is the system-generated date of physical posting into the system. A PCC user cannot change a posting date.

# Charge Based Reports

Report Generation - Step 1

Identify the kind of report to create.

Please select the kind of report that should be generated.


- Charge report with collection information (all valid charges)
- Payment report
- Daysheet report
- Deposit report with payment details and no charge information
- Appointment report
- Per-visit charge report with collection information
- Aging report
- Charge report with billing/submission info (only charges with balances)
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# Charge Based Reports

- Show charges either transacted during a time period (transaction date) or physically posted into the system during a time period (posting date)
- Extensive subtotaling capabilities (provider, place of service, procedure code/group, etc)
- Also show payments made on the charges being reported
- Refunds are reflected as charges

# Example: Charges by Provider

Let's create a custom report showing charge totals by provider and procedure group. Output should look like this:

HASH(0x2fc6418) 							
Service Provider Name: Beverly Crusher, MD							
Service Provider Name	Procedure Group Name	Units	Charge Amount	Amount Deposited (all pmts)	Amount Due	Amount Collected (all pmts + all adjs)	Percent Collected (all pmts + all adjs)
Beverly Crusher, MD	Imms Administration	15	\$504.00	\$11.50	\$400.00	\$104.00	20.63%
Beverly Crusher, MD	Immunizations	12	\$963.02	\$0.00	\$963.02	\$0.00	0.00%
Beverly Crusher, MD	Injections	4	\$190.00	\$12.42	\$1.02	\$188.98	99.46%
Beverly Crusher, MD	Laboratory Procedures	19	\$319.00	\$36.00	\$266.00	\$53.00	16.61%
Beverly Crusher, MD	Medical Procedures	2	\$33.00	\$0.00	\$33.00	\$0.00	0.00%
Beverly Crusher, MD	Medical Tests	8	\$122.00	\$5.00	\$85.29	\$36.71	30.09%
Beverly Crusher, MD	Office Visits, Est Patients	17	\$2,481.00	\$437.74	\$1,292.68	\$1,188.32	47.90%
Beverly Crusher, MD	Physical Exams, Est Patients	5	\$891.00	\$0.00	\$824.96	\$66.04	7.41%
Beverly Crusher, MD	Unclassified	1	\$175.00	\$0.00	\$175.00	\$0.00	0.00%
Beverly Crusher, MD		83	\$5,678.02	\$502.66	\$4,040.97	\$1,637.05	28.83%

# Example: Charges by Provider

- Start with “Charge and Reimbursement Comparison by Provider”
- Amount deposited represents payments **on the charges being reported.**
  - Payments on charge reports cannot be compared to payments on payment-based or daysheet reports

# Payment Based Reports

## Report Generation - Step 1

Identify the kind of report to create.

Please select the kind of report that should be generated.

- Charge report with collection information (all valid charges)
- Payment report
- Daysheet report
- Deposit report with payment details and no charge information
- Appointment report
- Per-visit charge report with collection information
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# Payment Based Reports

- Useful for getting more detailed subtotals of payments (i.e., payments by check number)
- Always recommended to run by transaction date
  - For insurance payments, this is typically the date of the check
  - For other payments, it's the date entered by the user

# Why Run by Transaction Date?

- Because payment relinking happens all the time
- **When a payment is relinked, the posting date for that payment changes**
- When reporting monthly payment productivity, you don't want to count a payment in a given month if it was already counted for a prior month

# Example: Payments by Provider and Procedure

Let's create a custom report showing payment totals by provider and procedure group. Output should look like this:

HASH(0x34f7ae8)						
Service Provider Name: Beverly Crusher, MD						
Service Provider Name	Group Name	Personal Pmt	Ins Pmt	Personal Adj	Ins Adj	Amount Collected (all pmts + all adjs)
Beverly Crusher, MD	Imms Administration	\$0.00	\$49.20	\$0.00	\$114.80	\$164.00
Beverly Crusher, MD	Immunizations	\$0.00	\$19.93	\$0.00	\$15.07	\$35.00
Beverly Crusher, MD	Injections	\$0.00	\$12.42	\$0.00	\$176.56	\$188.98
Beverly Crusher, MD	Laboratory Procedures	\$0.00	\$27.58	\$0.00	\$80.42	\$108.00
Beverly Crusher, MD	Medical Procedures	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Beverly Crusher, MD	Medical Tests	\$0.00	\$7.98	\$0.00	\$61.22	\$69.20
Beverly Crusher, MD	Office Visits, Est Patients	\$20.00	\$407.74	\$0.00	\$763.30	\$1,191.04
Beverly Crusher, MD	Physical Exams, Est Patients	\$0.00	\$168.20	\$0.00	\$237.84	\$406.04
Beverly Crusher, MD	Unclassified	\$35.00	\$0.00	\$0.00	\$0.00	\$35.00
		\$55.00	\$693.05	\$0.00	\$1,449.21	\$2,197.26

# Example: Payments by Provider and Procedure

- Start with “Payment Breakdown by Provider”
- Always run by transaction date
- Insurance payment and personal payments are reported separately
  - Combine these to get total payments

# Visit Based Reports

## Report Generation - Step 1

Identify the kind of report to create.

Please select the kind of report that should be generated.

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- Appointment report
- Per-visit charge report with collection information
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# Visit Based Reports

- Based on PCC's charge database
- Based on transaction (service) date of visit
- Useful for counting and categorizing visits (sick, well, vaccine-only, telemed, hospital, etc)
- Also shows payments made on the visits being reported
- Extensive subtotaling capabilities (provider, location, etc)

# Visit Categories

- Categories defined for sick, well, consult, hospital, counseling, vaccine only, telephone, portal/email, telemedicine, and misc
- Based on CPT codes within the visit
- Well and sick codes on same day? This is categorized as a well visit

# Example: Revenue-per-Visit by Payor

srs Visit Reports → Per Visit Analysis By Payor ('activity' style)

Per-Visit Analysis by Payor ('activity' style)  
Description of Restriction Criteria  
Press the **F8** key to add to, or edit, the restriction listing below.

Transaction Date Range: 01/01/13 - 07/10/13

Charge Amount Due selection.  
Range is between \$0.00 and \$0.00.

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

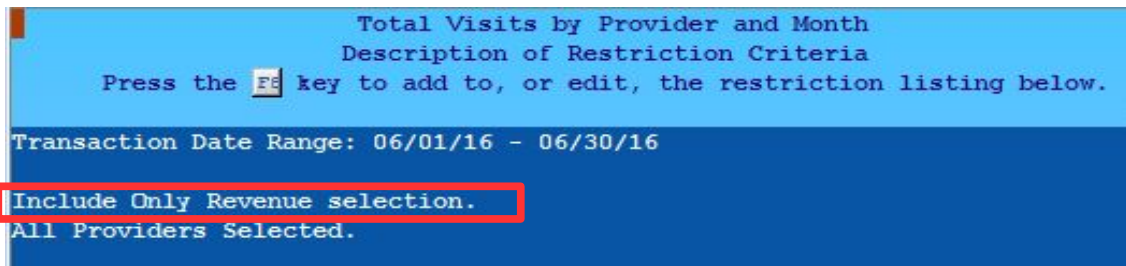
Press <F8> to add restriction criteria of "VISIT Amount Due for Visit" and specify \$0 to \$0. This ensures you are only looking at paid visits.



# Why so many Misc Visits?

- If a visit has CPT codes that do not match a category defined in the config file, it gets classified as “Misc”
- Did you add the “Include only Revenue charges” criteria?
- Example for later: Create a custom visit-based report to identify which visits were classified as “misc”

# Include Only 'Revenue' Visits



- Non-Revenue Services such as no-show or form fees can inflate total visits. Therefore, restrict the report to include only revenue services
- Add restriction criteria of “VISIT Include Only Revenue Charges.” This will report accurate visit totals

# RVU Based Reports

## Report Generation - Step 1

Identify the kind of report to create.

Please select the kind of report that should be generated.

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- Per-visit charge report with collection information
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# RVU Based Reports

- Based on PCC's charge database
- Based on transaction (service) date of visit
- Most CPT codes have Relative Value Units (RVUs) which are updated annually and vary by geographic region
- RVU reports can be useful for determining adequate pricing or for provider productivity
- Extensive subtotaling capabilities (provider, location, etc)

# Srs Tips and Tricks

- Avoid lots of subtotals for custom reports you will use in a spreadsheet
- Use F4 “Save as Default” to save criteria (this is a per-user setting)

# EHR Report Library

- Easy to customize
- Permissions-based to control user access
- Reports can be scheduled to run automatically in the future
- Includes broadcast messaging functionality

# Report Library Data Sources

- Patient Lists
- Appointments
- Immunizations
- Orders
- Lab Tests
- Portal
- Prescriptions
- Payments (Front Desk Payment Reconciliation)

# Customize Reports - Select Criteria

Report Library

### Customize Report

Title: Prescription Activity

Description: Prescription activity

Categories: Clinical, Data Source, Patient, Prescription, Visit

#### Select Columns to Include

Edit 9 Columns

#### Modify Report Criteria

**Patient Name**  
Enter search term

**Prescription Creation Date**  
Last 30 Days From 02/09/2019 to 03/11/2019

**Prescription Start Date**  
All Dates From mm/dd/yyyy to mm/dd/yyyy

**Prescription Stop Date**  
All Dates From mm/dd/yyyy to mm/dd/yyyy

**Prescriber**

Select Criteria Cancel Preview



# Customize Reports - Select Columns

The screenshot shows a window titled "Report Library" with a "Customize Report" section. The "Title" field contains "Prescription Activity" and the "Description" field contains "Prescription activity". Below these is a "Categories" dropdown menu with the text "Clinical, Data Source, Patient, Prescription, Visit". A yellow callout box with a black border points to the "Edit" button in the "Select Columns to Include" section, containing the text "Click 'Edit' to select columns to include in the report". The "Select Columns to Include" section has a red border around the "Edit" button and a disclosure triangle next to the text "25 Columns". A second yellow callout box with a black border points to the disclosure triangle, containing the text "You can click the disclosure triangle to review which columns are already included".

Report Library

## Customize Report

Title: Prescription Activity

Description: Prescription activity

Click "Edit" to select columns to include in the report

Categories: Clinical, Data Source, Patient, Prescription, Visit

### Select Columns to Include

Edit

▶ 25 Columns

You can click the disclosure triangle to review which columns are already included

# Restricting Report Access

**Manage Categories**

**Manage Categories**

Category Name	Allowed Roles	# of Reports
Appointment	Locum, Nurse, Nurse Practitioner, PCC Role	6
Billing	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	11
Clinical	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	20
Data Source	Administrative, Clerical, PCC Role	4
Front Desk	Administrative, Clerical, PCC Role	5
Immunization	Locum, Nurse, Nurse Practitioner, PCC Role	11
Patient	Administrative, Clerical, Locum, PCC Role	31
Patient Portal	Administrative, Clerical, Locum, PCC Role	16
Patient Recall	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	5
PCMH	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	25
Prescription	Nurse, Nurse Practitioner, PCC Role	9
Visit	Administrative, Clerical, PCC Role	15

**Add** **Delete** **Edit** **Close**

**Manage Categories**

**Manage Categories - Edit Category**

Category Name: Billing

**Allowed Roles**

**Select All** **Select None** Search:

- Administrative
- Clerical
- Locum
- Nurse
- Nurse Practitioner
- PCC Role

**Cancel** **Save**

# Broadcast Messaging

### Broadcast Messaging Patient List

Build a list of patients to be sent a broadcast message.

**Visit Date:** From 03/24/2020 to 03/24/2020  
**Deceased Status:** Not Deceased  
**Include by Patient Flag:** Billing Problem, Burlington Pediatrics, Chronic, CONFIDENTIALITY, Lake Champlain Pediatrics, Medicaid, Special Needs, Winooski F  
**Exclude by Patient Flag:** None  
**Patient Age:** From 0 mos. through 21 yrs. 11 mos.

Columns: 3 Displayed    Group By: None    Search:

Patient Name	PCC #	Patient DoB
Aucoin, Sean	2677	09/04/2000
Baird J.R., Ashlyn "RJ" Hope	574	12/10/2012
Boltz P.C., Richard M	489	03/10/2010
Broaddus, Janice M.	3277	07/18/2011
Ishler M.D., Alex "Ethan" Benjamin	724	06/02/2018
Jetson, Astro	1823	09/06/2015
Keim, Robert	2071	10/09/2004
Leah, Adam	2111	07/01/2000

15 results

[Report Library](#)    [Back](#)    [Export](#)    [Close](#)    [Print](#)

### Export

Save as PDF  
 Save as CSV  
 Send Message to Patients via

Text (SMS) messages are sent to mobile phone numbers from patients' home account and confidential communication preferences.

0/160

[Cancel](#)    [Send](#)

### Export

Save as PDF  
 Save as CSV  
 Send Message to Patients via

Email messages are sent to email addresses from the patients' home account, portal users, and confidential communication preferences.

Subject:

[Cancel](#)    [Send](#)

# Example - Well Visit Recall

- Start with - Patient Recall -> “Preventive Care Recall”
- Restrict on:
  - Visit date (last 3 yrs to include active patients)
  - Exclude by Patient flag (exclude pats w/ any type of inactive flag)
  - Patient age (focus on specific age range)
  - Physical due date (all past dates through next 90 days)
  - Exclude by scheduled appointment (exclude all well visit appointment types over next 365 days)

# Example - Identify 11-12 year olds Due for HPV Vaccine

Report Library

▸ Front Desk

▾ Immunization

Search:

Name	Description
Immunization Administration Count	Display the number of vaccines administered during a date range, grouped by lot number, vaccine type, lot location, and funding source.
Immunization Administration Count - Custom	Custom - date range 10/30/16 - 10/31/17, 5 flu immunizaitons, main location
Immunization Administration Details	View vaccine administration details for a given date range, including funding source, VFC eligibility, insurance policies and administering user.
Immunization Administration Details - Custom	Custom - date 10/30/16 - 10/31/17, 5 flu imms, all locations and users
Overdue Vaccine Recall	Find patients who are forecast to be due, or overdue, for specified vaccine families. This report requires immunization forecasting to be enabled.
Patient Immunization Administration Summary	Generate a list of patient vaccine histories for specified vaccines and number of administrations.
Patient Immunization Administration	Custom - removed-exclude-dead-patient-flag-removed-age-range-selection-1-to-6-photo-all-imms

# Example - Identify 11-12 year olds Due for HPV Vaccine

**Overdue Vaccine Recall**

Find patients who are forecast to be due, or overdue, for specified vaccine families. This report requires immunization forecasting to be enabled.

**Last Visit Date:** From 09/11/2016 to 09/11/2019  
**Deceased Status:** Not Deceased  
**Include by Patient Flag:** All  
**Exclude by Patient Flag:** None  
**Include by Account Flag:** All

Columns: 4 Displayed      **Group By:** Vaccine Family      Search:

Patient Name	Dose #	Recommended Date	Past Due Date
<b>Rotavirus (12)</b>			
Bennett, Karis Jean	1	08/10/2019	09/10/2019
Case, Christen	1	08/03/2019	09/03/2019
Cheatham, Josiah J	1	07/22/2019	08/22/2019
Eichelberger, Chelsea J	1	08/09/2019	09/09/2019
Friedrich, Jeffrey	1	07/29/2019	08/29/2019
Gullett III., Jacob "Max" Christopher	1	07/24/2019	08/24/2019
Hoover M.D., Ian "Nate" Hope	1	09/09/2019	10/09/2019
Ludwig, Christophe	1	08/06/2019	09/06/2019
Morrison D.D.S., Adam "Jay" Boy	1	08/05/2019	09/05/2019
Reardon Sr., Shelly "David" NP	1	07/24/2019	08/24/2019
Stanson, Karen	1	07/29/2019	08/29/2019

896 results

*Note: A callout box points to the 'Rotavirus (12)' header, stating: "There may be 12 patients at my practice who are overdue for their Rotavirus vaccine"*

# Reporting Workshop

- Experience using these srs and Report Library to build and customize reports relevant to your practice
- Refer to exercises or build a report specific to your practice needs

# Session Takeaways

1. An understanding of underlying data sources within PCC PM and Report Library
2. Experience and confidence with creating custom reports on your own



# References

- Reports Drop-In (In-Person Only)
- [Customizing Smart Report Suite \(srs\) Reports](#)
- [Creating Custom Reports Using Report Library](#)

# What Questions Do You Have?

# Later Viewing

This and all other UC2023 course recordings will be available for later viewing through the app.