KAV Consulting



ETM Reports Manual

Functional Documentation

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# Concepts

There are several ETM concepts that are critical to understanding the rest of the design components.

* ETM is a real-time application. Reports include the data at the time they are prepared and based on the criteria used.
* Microsoft Excel is used as the output application due to its universal acceptance and the Pivot Table capabilities.
* Microsoft Excel 2007 or higher is recommended since some of the reports exceed the line limitation of MS Excel 2003 and the Pivot Table and drill through capabilities are improved across all reports.

## Dictionary Values

The following entries are from the ETM Dictionaries and will be referenced in the pages that follow.

### Tasks

* Tasks drive the process in ETM, from item selection to Previews and Instructions.
* Each workflow has its own prefix and associated Tasks. Here are the different Task prefixes and associated workflows:
	+ CE – Claim Edits
	+ CPE – Claim Payer Edits
	+ CAR – Claim Acknowledgement Rejections
	+ REJ – Rejections
	+ NA – No Activity
	+ CB – Credit Balance
	+ OTH – Invoice Other
	+ TES – TES Edits
	+ SP – Self Pay
	+ CS – Customer Service
	+ MT – Manual Task
	+ HBA – Hold Bills/Alerts

### Statuses

* Statuses indicate the current condition of the Task, whether it is being worked on, waiting to be worked on, pending further information/follow-up, or completed.
* Statuses are grouped into Status Groups which categorize the different Statuses and allow for more effective reports.
* Point in Time (PIT) reports are typically page filtered by Status Group.

#### Status Groups

* Open – Items in the end user’s Open views that require immediate effort.
* Hold – Items in the end user’s Pending views that have been held
* Worked – Items in the end user’s Pending views that the user considers complete
* Activity – Only used in the No Activity portion of the Invoice workflow; Items that are currently considered active and not included in the views
* Historical – Items that have been confirmed as complete by the system and no included in the views
* Preprocessing – Items being scrubbed and not yet release to the end users

### Roles

* Roles within ETM are utilized to represent areas of responsibility. Therefore, Roles will include definitions such as Registration, Collections, Coding, Credentialing, etc.
* Roles are also used to allow for Reassignment of Tasks to certain areas, such as Charge Correction responsibility to Payment Posting research.
* Roles are the backbone of View definitions.

## KAVart Report Production

* To provide beneficial report information on a consistent and on-going basis, a reporting tool was developed to allow the production of these reports automatically with predefined output~~.~~ The tool developed is referred to as KAVart – the KAV automated reporting tool. This tool is used for report definition, output creation and distribution. The scheduling of these reports takes place in Windows Task Scheduler, a component of the KAVart implementation. KAVart is:
	+ A tool to allow daily, weekly, and monthly automatic updating, running, and outputting of Cache reports
	+ A report production tool that allows creation of MS Excel files with pre-defined PivotTables, charts, and graphs from the source data
	+ A mechanism for Information Technology to manage the production of reports
	+ A tool for management to have reports dropped into a specified shared location or emailed directly to a recipient(s)
	+ An opportunity to allow for system error checking and notification
	+ A solution for meeting daily reporting needs without having daily data warehouse updates
	+ A solution to eliminate the cost of labor intensive manual report production
* Any changes to distribution or report output definition should be submitted to your support team in Information Technology. Changes are easy to complete and requests should be submitted to implement these changes.
* All reports are produced during off-hours to minimize or eliminate impacts to daily processing

# Point in Time (PIT) Reports

The Point in Time (PIT) report reflects the inventory of items in a particular workflow. Knowing the inventory based on age categories allows for appropriate resource allocation to work Tasks effectively.

## Report Focus

* The Point-In-Time report provides a current inventory of the items in the workflow, where the Tasks are from a Role and age perspective, Status and responsibility.
* This report is available for all implemented workflows. Each workflow will have its own PIT report. The report is based on Task category and each workflow provides relevant data fields for better data management.
* The report is formatted to your needs since data is provided in MS Excel. The default report can be modified to best fit the needs of the organization or the pivot table can be modified for ad hoc evaluation.
* Shows age of all Tasks and the category or team they are related to.
* Allows management or users to focus on aged items.

## Intended Audience

* Providing an inventory of items allows any level of management to have a quick understanding of the items outstanding and work effort. The data available allows for analysis of outstanding Tasks and provides management with a tool for addressing older items or analyzing certain trends of non-worked items.

## Report Production

* These are automated reports that are usually run on a weekly basis on Mondays. The report production is defined through the KAVart reporting tool. They can also be run manually via the Report Writer in GEHC Webframework.

## Sample Report

* The PIT report is always presented in a table format, with the Task age grouped appropriately for the workflow.
* The report either allows drill through or includes a detail tab with all of the columns available (depending on the version of Excel in which the report is created and the version used to view the report).



Figure 2‑1: Sample Point in Time (PIT) report produced by the KAVart Application

## Columns Definitions

* Each PIT report can vary between workflows. There are standard columns across all PIT reports and variances will be outlined. Column order may not be consistent with the information outlined below.

### Standard Columns

* Id – Represents Task ID, the unique identifier for ETM
* Ind – the indicator field, represents special situations specific to the Task
	+ TXR – Transfer into the current Role
	+ TKR – Tickler return
	+ RET – A Return of an item completed incorrectly
	+ REP – A Repeat of the same edit and/or Rejection
* DOS Age – Represents the age since the Date of Service
* View Age – Represents the number of days the item had been in the current View at the time of report update. A negative View age indicates a Task in a Hold Status and the number of days until the Task returns to an Open Status.
* Task – Identifies the Task Name
* Patient – Patient name
* MRN – Patient MRN
* Grp – Patient Group Number
* Invoice – Patient Invoice Number
* DOS – Invoice Date of Service
* InvBal – Balance on the invoice at the time of the report
* FSC – Represents the FSC Name at time of report update
* FSC# –Represents the number of the FSC at time of report update
* FSC List – Represents the list of FSCs in registration, separated by the character of ^
* FSC Position – Indicates Primary if invoice FSC is in position 1, Secondary otherwise
* FSC ETM Category – Represents the FSC ETM Category for the FSC at time of report update
* FSC Rep Category 1 – Represents the FSC Reporting Category 1 for the FSC at time of report update
* FSC Rep Category 2 – Represents the FSC Reporting Category 2 for the FSC at time of report update
* FSC Rep Category 3 – Represents the FSC Reporting Category 3 for the FSC at time of report update
* Provider – Represents the Provider Name on the Invoice, provider name on the Encounter for TES
* Referring Physician – Represents the Referring Physician on the Invoice
* Billing Area – Represents the Billing Area on the Invoice, Billing Area on the encounter for TES
* BArea ETM Category – Represents the Billing Area ETM Category on the Invoice/Encounter
* Division – Represents the Division Name on the Invoice, Division Name on the Encounter for TES
* Div ETM Category – Represents the Division ETM Category on the Invoice/Encounter
* Location – Represents the Location Name on the Invoice, Location Name on the Encounter for TES
* Loc ETM Category – Represents the Location ETM Category on the Invoice/Encounter
* Assigned Name – Represents a list of Names of users that are currently assigned to the Task
* Assigned User – Represents a list of Usernames of users that are currently assigned to the Task
* Assigned Dept – Represents a list of Departments of users that are currently assigned to the Task
* Last Upd User – The last user who updated the Task. If no user has worked the Task, this field will be blank.
* Task Role – Indicates the Role, or area of responsibility of the Task at time of report update
* Role Group – Indicates the roll-up or team of the Role, or area of responsibility of the Task at time of report update. The Role Group is defined in the Roles Dictionary.
* Task Status – Indicates the Status of the Task at time of report update
* Status Group – Indicates the Status Type, whether Open, Hold, Historical, of the Task at time of report update
* TF Age – Indicates the Timely Filing days at time of report update. The age is calculated by subtracting the number of days indicated for the FSC in dictionary 19 from the date of service.
* ReviewDate – Represents the date a Task is expected to be worked following a Hold Status. When a user places a Task in the Hold Status they will also extend out the review date of the Task to the date when they need to work it again.
* UpdDt – Represents the last date the item was touched at the time of report update

### Workflow Specific Columns

* Claim Edits Workflow
	+ Clm Age – Represents the age since the first claim edit
	+ Last Edit Msg – Reflects the actual last edit reason for edit
	+ Clm Dt – Date of first claim edit
	+ Clm Run – Claim Run Number of first edit
	+ Form – Indicates the claim form the edit is related to
* Claim Acknowledgement Rejections Workflow
	+ Age – Represents the age since the response was received
	+ Prio Clm Status – Indicates the Claim Status
	+ Prio Clm Status Group – Indicates the Claim Status Group
	+ Prio Clm Status Category – Indicates the Claim Status Category
	+ Prio Clm Status Entity – Indicates the Claim Status Entity
	+ Resp Dt – Represents the date the response was received
* Rejections Workflow
	+ Age – Represents the age since the rejection was posted
	+ Prio Rej Code – Indicates the Rejection Code Name
	+ Prio Rej Type – Indicates the Rejection Code Type
	+ Prio Rej Description – Indicates the Rejection Code Description
	+ Post Dt – Represents the date the rejection was posted.
	+ Repeat Count – Indicates how many times the same rejection was posted
	+ App TF – Indicates the Timely Filing days at time of report preparation. The age is calculated by subtracting the number of days indicated for the FSC in dictionary 19 from the date of service.
* No Activity Workflow
	+ NA Age – Represents the age since the Task entered No Activity
	+ Stage – Indicates the Stage name
	+ Workflow – Indicates the workflow that the Stage is in
	+ Start Date – Defines the threshold for No Activity. It is the date the Task met the criteria to transfer from Activity to No Activity.
* Invoice Other Workflow
	+ Inv Age – Represents the age since the Invoice was created
	+ Stage – Indicates the Stage name
	+ Workflow – Indicates the workflow that the Stage is in
	+ Inv Cre Dt – Indicates the date that the Invoice was created
* Credit Balance Workflow
	+ CB Age – Represents the age since the credit was posted
	+ Stage – Indicates the Stage name
	+ Workflow – Indicates the workflow that the Stage is in
	+ Credit Bal Dt – Indicates the date the credit was posted
* TES Edits Workflow
	+ Enc Age – Represents the age of the encounter
	+ Last Edit Msg – Reflects the actual last edit reason for edit
	+ Encounter – Indicates the Encounter number
	+ TotChg – Indicates the total charges on the Encounter
* Self Pay Workflow
	+ Guarantor – Guarantor’s Name if not Patient, otherwise Patient name
	+ Stmt Cur Bal – Statement balance at the time of the report
	+ Last Stmt Bal – Last statement balance at the time of the report
	+ Stmt Dt – Statement Date
	+ Stmt Cyc – Current Statement Cycle
	+ Dunning Lvl – Current Dunning Level
	+ Acct Status – Current Account Status
	+ Bud Amt – Established Budget amount for this invoice at time of the report
	+ Last Pmt Dt – Date of last payment at the time of the report
	+ Last Pmt Amt – Amount of last payment at the time of the report
* The Detail or Edit PIT will include additional columns at the edit or transaction level for Claim Edits, Claim Ack Rejections, Rejections, and TES Edits.

## Management Analysis

Since the PIT report indicates inventory and aging of inventory, it should be used to manage goals defined by aging and overall volume.

* On a weekly basis management should review the report for their appropriate workflows evaluating for the following parameters:
	+ Any Tasks greater than a defined threshold, for instance, rejections greater than 90 days, claim edits greater than 15 days, etc. These thresholds should be defined, communicated and adhered to for each workflow.
	+ Specific high volume areas or pain points should be analyzed. If Registration is normally lower volume but the weekly PIT indicates a significant influx of rejections, this can be mitigated quickly. Similarly this report can allow ongoing monitoring of defined pain points, like Clinic requests or high impact areas.
	+ Analyze the report for unused or unknown Roles. Role Controls have been implemented, but at times Tasks can be reassigned to Roles that may not have the monitoring attention as the more frequently used Roles. There are also opportunities for Escalation to Management Roles that may not be monitored as frequently via the actual working in the Views. This report will identify those Tasks.
* Shared management of Workflows
	+ There are certain workflows that are shared among several different management areas. This could lead to areas of inventory not managed or unintentionally ignored.
	+ In every area and for each workflow, there needs to be one person designated as the workflow manager. This person should have an understanding of the entire workflow, preferably the responsibility of the majority of Tasks included in the workflow and must understand and accept the responsibility of areas not directly under their organizational area.
	+ Allowing this type of workflow management eliminates the buildup of unintentionally allocated Tasks.
	+ This type of overall management is not as critical for other reports, but when managing inventory it is critical to manage the entire workflow.
* Task vs Detail analysis
	+ There are typically two levels of reports produced when workflows allow for roll-ups of Tasks, for instance in Claim Edits. This roll up provides for multiple levels of management analysis.
	+ The PIT produced in detail allows for an analysis of specific Task reasons. For instance, if you look at a VOL report for Claim Edits, you might see 50 Tasks were created but understanding that 40 of those Tasks also had edits for Missing NPI as well as Missing Certificate Number might change the perspective of how these Tasks are generated or resolved. Management may decide that certain edits should not Task or should be allocated or prioritized differently.
	+ The Task Level report provides a view of effort required. An invoice that is editing for Missing Certificate Number might also be editing for 5 other edits, all resolved by resolving the one Task for the invoice.

# Volume (VOL) Reports

Understanding incoming volume is another important consideration in A/R management. The Volume Report (VOL) shows volume of Tasks over period of time, regardless of current Status. This allows trending, resource allocation and root cause analysis options.

## Report Focus

* The VOL report provides a trending option to understand volumes the last 3 BAR periods. With this report, trends and, therefore, root cause, can be analyzed.
* Understanding the volume of Tasks created over time will allow identification of root cause as well as necessary resource allocation for incoming Tasks.
* This report is available for all implemented workflows. Each workflow will have its own VOL report. The report is based on Task category and each workflow provides relevant data fields for better data management.

## Intended Audience

* Providing a volume over time of items allows any level of management to have a quick understanding of the incoming volume of Tasks. The data available allows for analysis of trends, root cause and components involved in Task creation.

## Report Production

* This is a monthly report, produced at the beginning of each month. The report contains Task information for the last 3 BAR periods over the defined period (usually 90 days), providing sufficient trending data for management. The report production is defined through the KAVart reporting tool. This report can also be run manually via the Report Writer in GEHC Webframework, though these reports take considerably longer to run.

## Sample Report

* This report is presented in a graph format with the PivotTable included in a separate worksheet
* A summary worksheet provides the graph data and can be referenced for drill through detail



Figure 3‑1: Sample Volume (VOL) report produced by the KAVart Application

## Column Definitions

* Each VOL report can vary between workflows. There are standard columns across all VOL reports and variances will be outlined. Column order may not be consistent with the information outlined below

### Standard Columns

* Id – Represents Task ID, the unique identifier for ETM
* DOS Age on … – Represents the age since Task creation to the most recent update of the Task.
* Task – Identifies the Task Name
* Patient – Patient name
* MRN – Patient MRN
* Grp – BAR Group that the invoice is associated with
* Invoice – Patient Invoice Number
* InvBal at Task Creation – Balance on the invoice at the time of task creation
* Current InvBal – Balance on the Invoice at the time of report running
* DOS – Invoice Date of Service
* FSC – Represents the FSC Name at time of report update
* FSC# – Represents the number of the FSC at time of report update
* FSC List – Represents the list of FSCs in registration, separated by the character of ^
* FSC Position – Indicates Primary if invoice FSC is in position 1, Secondary otherwise
* FSC ETM Category – Represents the FSC ETM Category for the FSC at time of report update
* FSC Rep Category 1 – Represents the FSC Reporting Category 1 for the FSC at time of report update
* FSC Rep Category 2 – Represents the FSC Reporting Category 2 for the FSC at time of report update
* FSC Rep Category 3 – Represents the FSC Reporting Category 3 for the FSC at time of report update
* Provider – Represents the Provider Name on the Invoice, provider name on the Encounter for TES
* Referring Physician – Represents the Referring Physician on the Invoice
* Billing Area – Represents the Billing Area on the Invoice, Billing Area on the encounter for TES
* BArea ETM Category – Represents the Billing Area ETM Category on the Invoice/Encounter
* Division – Represents the Division Name on the Invoice, Division Name on the Encounter for TES
* Div ETM Category – Represents the Division ETM Category on the Invoice/Encounter
* Location – Represents the Location Name on the Invoice, Location Name on the Encounter for TES
* Loc ETM Category – Represents the Location ETM Category on the Invoice/Encounter
* Assigned Name – Represents a list of Names of users that are currently assigned to the Task
* Assigned User – Represents a list of Usernames of users that are currently assigned to the Task
* Assigned Dept – Represents a list of Departments of users that are currently assigned to the Task
* Last Upd User – The last user who updated the Task. If no user has worked the Task, this field will be blank.
* Orig Task Role – Indicates the Role, or area of responsibility of the Task at time of Task creation
* Orig Role Group – Indicates the roll-up or team of the Role, or area of responsibility of the Task at time of report update. The Role Group is defined in the Roles Dictionary.
* Curr Task Role – Indicates the Role, or area of responsibility of the Task at time of report update
* Curr Role Group – Indicates the roll-up or team of the Role, or area of responsibility of the Task at time of report update. The Role Group is defined in the Roles Dictionary.
* Curr Task Status – Indicates the Status of the Task at time of report update
* Curr Status Group – Indicates the Status Type, whether Open, Hold, Historical, of the Task at time of report update
* TF Age – Indicates the Timely Filing days at time of report update. The age is calculated by subtracting the number of days indicated for the FSC in dictionary 19 from the date of service.
* CreDt – Represents the date the task was either created or sent to the Open views

### Workflow Specific Columns

* Claim Edits Workflow
	+ Clm Age – Represents the age since the first claim edit
	+ Last Edit Msg – Reflects the actual last edit reason for edit
	+ Clm Dt – Date of first claim edit
	+ Clm Run – Claim Run Number of first edit
	+ Form – Indicates the claim form the edit is related to
* Claim Acknowledgement Rejections Workflow
	+ Age – Represents the age since the response was received
	+ Prio Clm Status – Indicates the Claim Status
	+ Prio Clm Status Group – Indicates the Claim Status Group
	+ Prio Clm Status Category – Indicates the Claim Status Category
	+ Prio Clm Status Entity – Indicates the Claim Status Entity
	+ Resp Dt – Represents the date the response was received
* Rejections Workflow
	+ Age – Represents the age since the rejection was posted
	+ Prio Rej Code – Indicates the Rejection Code Name
	+ Prio Rej Type – Indicates the Rejection Code Type
	+ Prio Rej Description – Indicates the Rejection Code Description
	+ Post Dt – Represents the date the rejection was posted.
	+ Repeat Count – Indicates how many times the same rejection was posted
	+ App TF – Indicates the Timely Filing days at time of report preparation. The age is calculated by subtracting the number of days indicated for the FSC in dictionary 19 from the date of service.
* TES Edits Workflow
	+ Enc Age – Represents the age of the encounter
	+ Last Edit Msg – Reflects the actual last edit reason for edit
	+ Encounter – Indicates the Encounter number
	+ TotChg – Indicates the total charges on the Encounter
* The Detail or Edit VOL will include additional columns at the edit or transaction level for Claim Edits, Claim Ack Rejections, Rejections, and TES Edits.

## Management Analysis

Since the VOL report indicates the inflow of Tasks it should be used to analyze incoming volumes and effort required to address those volumes

* On a monthly basis management should review the report for their appropriate workflows evaluating for the following parameters:
	+ Identifying the areas of largest incoming volume.
	+ Allocation of effort by Task level. A staff member can be very productive and up to date on their inventory, but it might be related to the fact that that employee is receiving easily resolvable Tasks or even Tasks that could be automated.
	+ Analyzing the detail report allows for root cause analysis to understand what steps can be taken to reduce the inflow, thereby reducing cost of collections overall.
* Shared management of Workflows
	+ Since this is reporting on inflow of claims there is no concern for black holes or lost Tasks, just lost potential to possibly reduce volumes.
* Task vs Detail analysis
	+ There are typically two levels of reports produced when workflows allow for roll-ups of Tasks, for instance in Claim Edits. This roll up provides for multiple levels of management analysis.
	+ The VOL produced in detail allows for an analysis of specific Task reasons. For instance, if you look at a VOL report for Claim Edits, you might see 50 Tasks were created but understanding that 40 of those Tasks also had edits for Missing NPI as well as Missing Certificate Number might change the perspective of how these Tasks are generated or resolved. Management may decide that certain edits should not Task or should be allocated or prioritized differently.
	+ Whereas for the Task Level report, indicates the incoming volume of Tasks and indicate the effort required to allow Tasks to be resolved. If you consider the reports provided, the combination of VOLUME and OUTCOMES equals the current staff working the ongoing Tasks and then consider in that calculation the current inventory from the PIT report, this will provide an understanding of staffing required.

# Outcomes Report

Productivity reporting has long been a goal of A/R managers. With ETM and the concept of Outcomes within the application, management will not only be able to receive reports on how many items were resolved by staff during the day, but also how the staff resolved the items based on Outcomes.

## Report Focus

* The Outcomes report provides a productivity report of actions taken to resolve individual Tasks.
* This report is inclusive of all implemented workflows. Each workflow will be represented on one universal Outcomes Report. This provides an overall snapshot of productivity for users, regardless of area of effort.
* Allows reporting across the workflows by user providing an overall review of the user even when Outcomes differ across workflows. Claim edit workflows may be different than rejection workflows.
* True staff productivity is just one benefit of this report. Additional value is provided by evaluating the timestamp on each Outcome to understand the work effort of each individual, what hours they were working, or when they were completing Tasks.
* Alternatively, the data in the Outcomes report can be manipulated via pivot tables to look at all Outcomes based on Task, Priority Rejection Type, and other data elements to evaluate how the staff are processing items overall. This will provide data on the resolution pathway taken on certain items. From this information we will know that a certain rejection is always adjusted or a particular edit is always transferred to self-pay. The understanding of these patterns allows management to identify potential automation.
* The report also indicates incorrect Tasks completions by use of a Return indicator. Any situations where Outcomes are selected but the Task is truly not resolved will be indicated on this report as a Return and the production value reduced by the returned item.

## Intended Audience

* Providing a productivity report across all workflows provides all levels of management with a tool to analyze productivity and compare users’ goals to actual work.
* Quality Assurance or Training personnel can also benefit from this report to understand the current process or potential errors in processing by staff.

## Report Production

* This is an automated report that is typically run on a daily or weekly basis, depending on the preferences of the management staff. The report production is defined through the KAVart reporting tool. It can also be run manually via the Report Writer in GEHC Webframework.

## Sample Report



Figure 4‑1: Sample Outcomes report produced by the KAVart Application

## Column Definitions

Each Outcome report crosses all workflows. Column order may not be consistent with the information outlined below

* Id – Represents Task ID, the unique identifier for ETM
* DOS Age – Represents the age since Date of Service
* View Age – Represents the number of days the item had been in the current View at the time of report update
* Age – Represents the workflow specific age
* Task – Identifies the Task Name
* Category – Identifies the Task Category
* Last Activity – Represents the workflow specific information
* Last Activity Detail – Represents the workflow specific detail
* Last Activity Descr – Represents the workflow specific description
* Last Activity Date – Represents the workflow specific date
* Patient – Patient name
* MRN – Patient MRN
* Grp – BAR Group that the invoice is associated with
* Invoice - Patient Invoice Number
* InvBal – Balance on the invoice at the time of the report
* DOS – Invoice Date of Service
* FSC – Represents the FSC Name at time of report update
* FSC# –Represents the number of the FSC at time of report update
* FSC List – Represents the list of FSCs in registration, separated by the character of ^
* FSC Position – Indicates Primary if invoice FSC is in position 1, Secondary otherwise
* FSC ETM Category – Represents the FSC ETM Category for the FSC at time of report update
* FSC Rep Category 1 – Represents the FSC Reporting Category 1 for the FSC at time of report update
* FSC Rep Category 2 – Represents the FSC Reporting Category 2 for the FSC at time of report update
* FSC Rep Category 3 – Represents the FSC Reporting Category 3 for the FSC at time of report update
* Provider – Represents the Provider Name on the Invoice, provider name on the Encounter for TES
* Referring Physician – Represents the Referring Physician on the Invoice
* Billing Area – Represents the Billing Area on the Invoice, Billing Area on the encounter for TES
* BArea ETM Category – Represents the Billing Area ETM Category on the Invoice/Encounter
* Division – Represents the Division Name on the Invoice, Division Name on the Encounter for TES
* Div ETM Category – Represents the Division ETM Category on the Invoice/Encounter
* Location – Represents the Location Name on the Invoice, Location Name on the Encounter for TES
* Loc ETM Category – Represents the Location ETM Category on the Invoice/Encounter
* TF Age – Indicates the Timely Filing days at time of report update. The age is calculated by subtracting the number of days indicated for the FSC in dictionary 19 from the date of service.
* App TF – Indicates the Timely Filing days at time of report preparation. The age is calculated by subtracting the number of days indicated for the FSC in dictionary 19 from the date of service.
* Orig Task Role – Indicates the Role, or area of responsibility of the Task at time of Task creation
* Orig Role Group – Indicates the roll-up or team of the Role, or area of responsibility of the Task at time of report update. The Role Group is defined in the Roles Dictionary.
* Curr Task Role – Indicates the Role, or area of responsibility of the Task at time of report update
* Curr Role Group – Indicates the roll-up or team of the Role, or area of responsibility of the Task at time of report update. The Role Group is defined in the Roles Dictionary.
* Curr Task Status – Indicates the Status of the Task at time of report update
* Curr Status Group – Indicates the Status Type, whether Open, Hold, Historical, of the Task at time of report update
* View – Represents the view that the Outcome was selected in
* User Name – Represents the name of the User that selected the Outcome
* Upd User – Represents the username of the User that selected the Outcome
* Upd Dept – Represents the department of the User that selected the Outcome
* UpdDt - Represents the last date the Task was updated
* UpdTm - Represents the last time the Task was updated
* Outcome - Indicates the Outcome selected by the user as the final resolution on the item
* Outcome Group – Represents the group of the Outcome that was selected
* Production Points - Indicates the value of each Outcome. One point for each Outcome will be added, one subtracted for each Return.

## Management Analysis

Outcomes provide management the opportunity to evaluate staff productivity in relation to what Tasks they are resolving and how they are resolving them. Access to this level of information provides significant value in not only understanding what an employee is resolving per day, but also how Tasks in general are being resolved. It also serves as a tool to identify possible training or automation opportunities.

* On a daily or weekly basis management should review the report for their appropriate employees. Below are some tips on how to review the report and what data elements to look for:
	+ Reviewing the report to address employees and how they are measuring up to expected performance goals. If goals are not met, it is imperative that management either understand and modify the expectations or hold the employee accountable for the goals and expectations. Indicating goals and then not following through with repercussions of not meeting those goals does not adequately serve management.
	+ Identifying goals and identifying shining stars and promoting wins will go much further than using this report as a consistent negative tool.
	+ Consistent review of Returns and Repeats on the report will allow for ongoing training opportunities or further confirmation of weak areas for certain employees.
	+ Comparison of resolution procedure for employees across Tasks. Modifying the pivot table parameters in the report will allow for comparison of employees and how resolution options are selected across Tasks.
	+ Review of this report from a detail perspective will also serve as an audit tool to understand and compare how Tasks are resolved among and across employees.

# Stage Summary Report

The Stage Summary report provides snapshot of A/R on one page with drill-through and analysis opportunity by any invoice or ETM data element.

## Report Focus

* The Stage Summary report provides a one-page snapshot of the total accounts receivables.
* This report is available for the Invoice workflow.
* The report is a query of the invoice (insurance follow-up Task) that records as a stage where the invoice is in its life cycle and how other Tasks create if the stage is an exception (CE, CPE, and REJ). But if the stage has a workflow of No Activity then the Task is worked via the no activity flow.
* The Workflows and Stages of the exception Tasks (Claim Edits, Rejections, etc.) does not reflect the Status of those Tasks, just the Status of the invoice that has the associated Task currently active.
* This report runs efficiently, for instance it may take as little as 20 minutes to process the query for a database with $120 million in A/R.
* Pivot tables included on the report allow for page filters or any level of pivoting on any invoice or ETM data element.
* Every data field allows drill through capability for further analysis.
* Stage is defined as the current state of the invoice.
* The level of detail is defined by each client.
* Stages are also rolled up into categories called Workflows to allow for different levels of detail.

## Intended Audience

* Having the entire A/R available in a pivot table allows many levels of management and financial support staff the opportunity to evaluate any section of, or the entire receivables. Allowing pivot tables and page filters provides data manipulation by any defined invoice parameter.

## Report Production

* This is an automated report that is run on either a weekly or monthly basis it can also be run manually via the Report Writer in GEHC Webframework.

## Sample Report



Figure 5‑1: Sample Stage Summary report produced by the KAVart Application

## Column Definitions

* The main parameter of the Stage Summary is the actual stage and workflow. These are defined within the system as the last activity on the invoice.
* As the invoice moves through its lifecycle, the different events keep the Task updated and determine whether or not it will be subjected to user review.
* The isolated criteria that update the Tasks (AKA Task Definitions) include any system activity that would impact the workflow. Each activity updates the Stage and Status fields to reflect the most recent BAR activity. The Start Date value is also updated. Start Date is the equivalent to the no activity date and is set based on how many days after the specific activity it is expected that other BAR activity should occur.
* The Stage is defined as the last activity. Stages are defined in the table below.
* The workflow is defined as a grouping of the Stages. The stages of Claim Edits, Rejections, etc. are all defined as their individual Stages. There are also Stages of Activity and No Activity.
* Activity is defined as those Stages and associated invoices where current activity is being pursued by the payers or the invoice is pending further activity, as defined in the grid below.
* No Activity are those invoices that are currently allocated to the users in the No Response/No Activity (NA) Views since the date upon which follow-up should occur has passed.
* Also available on this report is the FSC position. This allows the report to be categorized as Primary, Secondary, etc so that A/R can be further grouped and understood.
* Below is a list of the different ETM Stages and corresponding descriptions for the workflow. The actual start dates of each can be referenced in the workflow documentation for the NA flow.

|  |  |  |
| --- | --- | --- |
| **Workflow** | **Stage** | **Description** |
| Non-work | Zero Balance | Invoice balance is zero |
| Other ETM Workflows | Credit Balance | Invoice balance is less than zero |
| Other ETM Workflows | Claim Edit | Invoice has a Claim Edit Task |
| Other ETM Workflows | Claim Payer Edit | Invoice has a Payer Edit Task |
| Other ETM Workflows | Rejection | Invoice has a Rejection Task |
| Other ETM Workflows | Correspondence | If in the Correspondence workflow specific requests may need to suppress NA or D19 Carve Out follow-up, the creation of the Tasks associated with those requests triggers this Stage  |
| Other ETM Workflows | Customer Service | In the Customer Service workflow specific requests may need to suppress NA or D19 Carve Out follow-up, the creation of the Tasks associated with those requests triggers this Stage  |
| D19 Carve Out Stages | Collections | Invoice FSC has an ETM Stage populated in D19 of Collections |
| D19 Carve Out Stages | Do Not Bill | Invoice FSC has an ETM Stage populated in D19 of Do Not  |
| D19 Carve Out Stages | Self Pay | Invoice FSC has an ETM Stage populated in D19 of Self Pay |
| D19 Carve Out Stages | Employee Health | Invoice FSC has an ETM Stage populated in D19 of Self Pay |
| Activity/No Activity Workflow  | New Invoice | New Invoice in a non-claim producing FSC and default when no other Stage applies |
| Activity/No Activity Workflow  | New Invoice Clm Req | New Invoice in a claim producing FSC |
| Activity/No Activity Workflow  | Claim Submitted | Last activity was a Claim Submission where the claim count for this payer = 1 |
| Activity/No Activity Workflow  | Claim Resubmitted | Last activity was a Claim Resubmission where the claim count for this payer > 1 |
| Activity/No Activity Workflow  | Claim Payer Edit Override | Invoice had a Payer Edit with an Override Outcome |
| Activity/No Activity Workflow  | Insurance Payment Posted | Last activity was an Insurance Payment Posted |
| Activity/No Activity Workflow  | FSC Transfer | Last activity was a FSC Transfer: N to claim |
| Activity/No Activity Workflow  | FSC Transfer Clm Req | Last activity was a FSC Transfer: Y to claim |
| Activity/No Activity Workflow  | Debit Posted | Last activity was a Debit posted |
| Activity/No Activity Workflow  | Credit Posted | Last activity was a Credit posted |
| Activity/No Activity Workflow  | Charge Corrected Invoice | Last activity was a Charge Correction: N to claim |
| Activity/No Activity Workflow  | Charge Corrected Invoice Clm Req | Last activity was a Charge Correction: Y to claim |
| Activity/No Activity Workflow  | Claim Submitted Crossover | Last activity was a Crossover Claim |

Figure 5‑2: Overview of the Workflow definition for the Stage Summary report

The Stage Summary report allows drill-through to column detail. Column order may not be consistent with the information outlined below

* Id – Represents Task ID, the unique identifier for ETM
* Ind – The indicator field, represents special situations specific to the Task
* DOS\_Age – Represents the age since Date of Service
* View\_Age – Represents the number of days the item had been in the current View at the time of report update
* Age – Represents the workflow specific age
	+ NA Age – Represents the age since invoice creation based on the parameters defined in the Stage Definition. This should either be the number of claims since the appropriate claim or the last action on the invoice. This will be reflected as negative days if the appropriate No Activity value is not yet met.
	+ CB Age – Represents the age since credit balance creation for stages of credit balances.
	+ Inv Age – Represents the age since the Invoice was created
* Task – Identifies the Task Name
* Stage – Represents the Stage, or the last activity on the invoice. Stages are defined in the associated table
* Workflow – Represents a categorization of the Stages for more effective reporting. The workflows are defined in the associated table
* Dt – Represents the workflow specific date
	+ Start Date – Defines the threshold for No Activity. It is the date the Task met the criteria to transfer from Activity to No Activity.
	+ Credit Bal Dt – Indicates the date the credit was posted
	+ Inv Cre Dt – Indicates the date that the Invoice was created
* Patient – Patient name
* MRN – Patient MRN
* Grp – BAR Group that the invoice is associated with
* Invoice - Patient Invoice Number
* InvBal – Balance on the invoice at the time of the report
* DOS – Invoice Date of Service
* FSC – Represents the FSC Name at time of report update
* FSC# –Represents the number of the FSC at time of report update
* FSC List – Represents the list of FSCs in registration, separated by the character of ^
* FSC Position – Indicates Primary if invoice FSC is in position 1, Secondary otherwise
* FSC ETM Category – Represents the FSC ETM Category for the FSC at time of report update
* FSC Rep Category 1 – Represents the FSC Reporting Category 1 for the FSC at time of report update
* FSC Rep Category 2 – Represents the FSC Reporting Category 2 for the FSC at time of report update
* FSC Rep Category 3 – Represents the FSC Reporting Category 3 for the FSC at time of report update
* Provider – Represents the Provider Name on the Invoice, provider name on the Encounter for TES
* Referring Physician – Represents the Referring Physician on the Invoice
* Billing Area – Represents the Billing Area on the Invoice, Billing Area on the encounter for TES
* BArea ETM Category – Represents the Billing Area ETM Category on the Invoice/Encounter
* Division – Represents the Division Name on the Invoice, Division Name on the Encounter for TES
* Div ETM Category – Represents the Division ETM Category on the Invoice/Encounter
* Location – Represents the Location Name on the Invoice, Location Name on the Encounter for TES
* Loc ETM Category – Represents the Location ETM Category on the Invoice/Encounter
* Last Upd User – The last user who updated the Task. If no user has worked the Task, this field will be blank.
* Task Role – Indicates the Role, or area of responsibility of the Task at time of report update
* Role Group – Indicates the roll-up or team of the Role, or area of responsibility of the Task at time of report update. The Role Group is defined in the Roles Dictionary.
* Task Status – Indicates the Status of the Task at time of report update
* Status Group – Indicates the Status Type, whether Open, Hold, Historical, of the Task at time of report update
* TF Age – Indicates the Timely Filing days at time of report update. The age is calculated by subtracting the number of days indicated for the FSC in dictionary 19 from the date of service.
* ReviewDate – Represents the date a Task is expected to be worked following a Hold Status. When a user places a Task in the Hold Status they will also extend out the review date of the Task to the date when they need to work it again.
* UpdDt – Represents the last date the item was touched at the time of report update

## Management Analysis

* The Stage Summary report provides a one page summary of the current stage of every invoice in the current A/R. Having this level of detail provides significant value to A/R managers.
* The report is a query of the invoice (insurance follow-up Task) that records as a stage where the invoice is in its life cycle and how other Tasks create if the stage is an exception (CE, CPE, and REJ. Knowing the stage of each invoice provides management with a true snapshot of the current inventory of each invoice and analysis can be complete on questions like why would I have so many invoices currently in the stage of Primary Claim Submitted where the DOS age is greater than 365? Or why do you have so many invoices where the stage, and therefore last activity, is FSC Changed and no claims are being submitted?
* For those invoices/Tasks where the stage has a workflow of no activity these are the Tasks that are worked via the no activity flow.
* Providing the opportunity to filter the report by parameters such as Billing Area, Division, Provider, FSC Category, etc. allows for analysis and review of portions of the A/R and sharing of the current status or stage of the A/R for every invoice on the system.

# Ad Hoc or Client Specific Reports

The previously outlined include reports consistently provided to clients. Additional reports are also provided based on client needs. This is not an exhaustive list, but provides a few samples of reports provided. These types of reports are ad hoc and not part of the standard project.

## Note Type Specific Reports

* When certain Note Types are used, for instance Payer Edit Override Reasons, reports can be generated based on the utilization of that Note Type to assist in quality assurance of that utilization.
* This report is available and can be produced and run on demand or can be added as a scheduled report on a regular basis.

## Paycode Specific Reports

* Even though not everything is processed through ETM, you can still pull reports via Cache’ SQL. We have produced reports of all occurrences of a certain paycode during the month.
* This could also apply to all charges, all claims, all Appointment Types, etc.
* The output is totally up to the client/requestor.

## Exception/Error Reports

* ETM processes like Agents are run on a regular basis and it is important for some form of monitoring to ensure all agents are completed and no errors are encountered in GEHC while running.
* This can be accomplished via daily interactive monitoring or a report can be set up in KAVart to evaluate the agent scheduler each day and only report on exceptions or errors captured in GEHC via the error trap.
* Any automated processes should also have some type of backup solution