

Insurance Carrier Reports Menu

1 - Health Insurance Carriers

- Purpose:** A list of insurance carriers.
- Sort:** The sort is alphabetic by carrier name. The user can modify the sort as the sort screen is displayed or press **ENTER** for the default sort.
- Selection:** The report selects all the insurance carriers on file or all carriers beginning with a given string can be selected for example, all carriers that were coded starting with "B" or "BC" could be selected.
- Paper:** Sent to default printer. This report is 83 columns with no special printer codes. It should print on most printers on 8.5" paper.
- Procedure:** At the Reports Main Menu press **4** for the "Insurance Carrier Reports Menu" then press **1** for Health Insurance Carriers.
Change the sort indicated or press **ESC** to keep the sort by Company Name.

```
Change Printer Selection? (Y/N) >
```

Press **Y** to change the printer destination. Then a prompt will display as follows:

```
Select All Carriers Beginning with: ( ENTER for ALL) >
```

All carriers with ID's starting with the characters given will be selected.

See Appendix C for a sample printout.

Insurance Carrier Reports Menu

2 - Workers' Compensation Carriers

Purpose: A list of workers' compensation carriers.

Sort: The sort is alphabetic by carrier name. The user can modify the sort as the sort screen is displayed or press for the default sort.

Selection: The report selects all the workers' compensation carriers or only carriers with codes starting with the specified characters.

Paper: This report is 80-column and will print on 8.5" paper.

Procedure: At the Reports Main Menu press for the "Insurance Carrier Reports Menu" then press for Workers' Compensation Carriers.

```
Change Printer Selection? (Y/N) >
```

Press to change the printer destination. Then a prompt will display as follows:

```
Select All Carriers Beginning with: (  for ALL) >
```

All carriers coded starting with the letters given will be selected. If you would like only carriers beginning with the letters WC then type that and press .

See Appendix C for a sample printout.

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3 - Employer Claim Count

Purpose: A count of claims by employer over a given period of time. Lists the number of patients, claims and total charges by employer. If invoices have been purged during this time period, this report is not longer accurate. This report will be useful for worker's compensation and employer funded health care providers.

Sort: The sort is alphabetic by employer's name.

Selection: The report selects all invoices with a date between the given service dates.

Paper: This report is 80-column and will print on 8.5" paper.

Procedure: At the Reports Main Menu press for the "Insurance Carrier Reports Menu" then press for Employer Claim Count.

```
Change Printer Selection? (Y/N) >
```

Press to change the printer destination.

The following prompt appears:

```
From Service Date: (MM/DD/YY) ( for 01/28/93) >
```

Supply the start selection date. If you press a date will be selected 5 years earlier than today's date. Then enter the closing date .

```
End Service Date: (MM/DD/YY) ( for 01/28/98) >
```

Enter the closing date or press or for today's date. A window is displayed indicating the selection made.

```
Report selection between: 01/01/95 - 09/01/95  
Only valid if claims have not been purged in this time frame.  
REDO Responses?  es  o  -Exit
```

Press or if the selection is correct and the report will be generated. Press to cancel the report. Or press to reenter the selection responses.

See Appendix C for a sample printout.

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4 - Performance by Carrier

Purpose: This report will list the responsible parties (Insurance companies, patients and workman compensation carriers), with a total charge, payment, variance and Percent of Payment for a given time.

Sort: The report is sorted by Carrier Code.

Selection: A given year, quarter, or user selected consecutive months in a given year. Only data that has been recapped will be included in this report.

Paper: This report requires 8 1/2 " by 11" paper. The report prints to the default printer.

Procedure: Press **[4]** for the Insurance Carrier Reports Menu. Then press **[4]** for the Performance by Carrier Report.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination.

A drop list appears with a choice of quarters, a year or other. Select a quarter or year and you will be prompted next for the YEAR.

```
ENTER YEAR TO SELECT (ENTER for 1998) >
```

Press **[ENTER]** for the current year or type the year and the report will run. If you select "OTHER", you will be prompted for a starting month number and an ending month number. This report will only select within one year.

```
REQUEST OUTPUT

Select Month's from list below

Jan - Mar
Apr - Jun
Jul - Sep
Oct - Dec
Jan - Dec
Other
EXIT

Press BREAK To Exit.
```

Data: The variance represents the charges minus the payments. The "% CHG" represents the payments / charges x 100. This would indicate the amount normally received from an insurance company compared to the amount that was charged. The higher the percent the better the payments you are receiving from this carrier.

```

Your Practice Name
Medical Office System
Performance by Carrier
Jan - Dec 1996
FOR RSP PARTY ALL
Run: Sep 4, 1996
Page: 1
```

Carrier	Carrier Name	Charges	Payments	Variance	% CHG
BS	Blue Shield Of Pa	.00	.00	.00	
MC	Medicare	200.00	48.01	151.99	24.0
MD	Pennsylvania Medical Assist	10.00	.00	10.00	.0
PT	PATIENT	50.00	46.60	3.40	93.2
Total for Practice:		260.00	94.61	165.39	36.4

Insurance Carrier Reports Menu

5 - Electronic Insurance Data

Purpose: This report can be used to verify the codes and numbers that must be entered on the Insurance Carrier records when submitting claims electronically. This report will identify carriers that have been assigned the same name. It will also list the numbers needed to file electronically. The numbers required vary from state to state so you will need to get a list from your electronic service provider to update your data properly.

Sort: This report will print your insurance carriers alphabetically by company name. This sort can be changed at the time the report is generated.

Selection: All carriers are selected or all carriers starting with a given string can be selected.

Paper: This report will print on 8 1/2" x 11" tractor feed paper. It uses 12 pitch to fit 96 characters.

Procedure: At the Reports Main Menu press **[4]** for the "MOS Insurance Carrier Reports Menu" then press **[5]** for the Electronic Insurance Data Report.

The sort screen will be displayed:



Figure 1-2:Sort Options for Electronic Insurance Data List

The sort is currently designed to print alphabetically. If that is acceptable, then press **[ESC]** and the report will continue. Change the sort if the list from the insurance company is sorted in some other way and it would be easier to match and check the list. Any fields displayed on the list at the top of the screen can be used for the sort.

Change Printer Selection? (Y/N) >

Press **[Y]** to change the printer destination. Then a prompt to allow the list to be narrowed by selecting only carriers with ID's that start with the same characters.

Select All Carriers Beginning with: (**[ENTER]** for ALL) >

This report will print a warning, when the sort is alphabetical and there are two companies with exactly the same name. Use this information to rename the companies, to insure that no two carriers have identical names for the electronic submission portion of the software.

Note: The insurance company match with the electronic insurance file has been improved to eliminate the need to make the names unique, however, it is helpful to keep some uniqueness so the data entry people can distinguish the carriers properly.

Once the two records have been connected, they will always attach correctly.

Sample Electronic Submission Report

Your Practice Name					
Medical Office System					Run: Sep 4, 1996
+-----+					Page: 1
HEALTH INSURANCE CARRIERS					
ELECTRONIC SUBMISSION DATA					
+-----+					
Code	Company Name	Payor ID	Claim Office#	OCNA#	CO SOP Group #

AARP	AARP				
	P.O. Box 13999				
Y	Philadelphia, PA	19187			

AETN	Aetna				

BAS	Benefit Administrative Systems				
	43 Orland Square Drive				
	Suite 303				
N	Orland Park IL	60462			

BS	Blue Shield Of Pa		12345		Y
	Po Box 890058				
Y	Camp Hill PA	17089-0058			

BS65	Blue Shield Of Pa-Special 65				Y
	456 Blue Street				

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6 - Check Track List

Purpose: Print a list of payments applied by check track entries. This report will show what was paid with each check and the list can be compared to the list of invoices paid by a given check.

Sort: The report is sorted by Carrier Code then by check number. A total amount applied and un-applied is calculated.

Selection: The report selects all payments attached to a given check number, all payments entered on a given date or all payments.

Paper: This is an 80 column report and will print on 8.5" paper.

Procedure: Press **[6]** from the "Insurance Carrier Reports Menu".

Change Printer Selection? (Y/N) >

Press **[Y]** to change the printer destination.

Check # to Print or **[ENTER]** to enter a Check Date >

Enter the check number to be listed or press **[ENTER]** to select by check date instead.

Check Date: (MM/DD/YY) (**[ENTER]** to Select ALL) >

Enter the check date that was indicated for the check or press **[ENTER]** to select all checks on file. This file is cleared based on information in the Practice Setup and is purged with your End-Of Month Purge. So it is best to select this report based on the check number or check date to be sure you get just the information needed.

See Appendix C for a sample printout.

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7 - Code Cross-Reference List

- Purpose:** Print a list of all cross-reference codes entered.
- Sort:** The report is sorted by Carrier Code then by cross-reference type.
- Selection:** The report selects all cross-reference codes on file.
- Paper:** This is an 80 column report and will print on 8.5" paper.
- Procedure:** Press from the "Insurance Carrier Reports Menu".

Press to change the printer destination.

See Appendix C for a sample printout.

Insurance Carrier Reports Menu

8 - Submission Summary

Purpose: Print a summary of claims submitted during a given date range and how they were submitted This can be used to double check that claims have been submitted. A detailed version of this report is available on the Daily Reports Menu.

Sort: The report is sorted by Patient Account, Invoice Number, Date Submitted and How Submitted.

Selection: The report selects all claims submitted between user given dates.

Paper: This is an 80 column report and will print on 8.5" paper.

Procedure: Press from the "Insurance Carrier Reports Menu".

Change Printer Selection? (Y/N) >

Press to change the printer destination.

From Submission Date: (mm/dd/yyyy)
 for 01/05/2000

Enter the starting date for the report. Press for today's date. Then another prompt requests the closing date.

End Submission Date: (mm/dd/yyyy)
 for 01/05/2000

Enter the end submission date. Press for today's date.

Then you have one more chance to check your answers. This prompt allows you to repeat your answers if they are not correct.

Report selection between 01/05/2000 - 01/05/2000
Only valid if claims have not been purged during this time fram.e.
REDO Responses? es o -Exit

Insurance Carrier Reports Menu

9 - Count Patients by Carrier

Purpose: Count patients for each carrier listed on their Insurance Screen, Primary, Secondary, Tertiary and Workers Comp. A patient is counted under each carrier listed on their insurance screen.

Sort: The report is sorted by Carrier Code.

Selection: The report selects all patients with the selected patient status. This will allow only active patients to be selected.

Paper: This is an 80 column report and will print on 8.5" paper.

Procedure: Press from the "Insurance Carrier Reports Menu".

Press to change the printer destination.

No patient data is included on this report, just a list of carriers and a count for each carrier.

Insurance Carrier Reports Menu

A - Drug Definitions List

- Purpose:** A list of defined drugs.
- Sort:** The sort is alphabetic by drug name.
- Selection:** The report selects all items in the file.
- Paper:** Sent to default printer. This report is 83 columns with no special printer codes. It should print on most printers on 8.5" paper.
- Procedure:** At the Reports Main Menu press **[4]** for the "Insurance Carrier Reports Menu" then press **[A]** for Drug Definitions List.

Change Printer Selection? (Y/N) >

Press **[Y]** to change the printer destination.

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B - Diagnostic Lab Testing Providers

Purpose: A list of diagnostic lab testing providers.

Sort: The sort is alphabetic by provider name.

Selection: The report selects all items in the file.

Paper: Sent to default printer. This report is 83 columns with no special printer codes. It should print on most printers on 8.5" paper.

Procedure: At the Reports Main Menu press for the "Insurance Carrier Reports Menu" then press for Diagnostic Lab Testing Providers.

Change Printer Selection? (Y/N) >

Press to change the printer destination.

Insurance Carrier Reports Menu

C - Count Patients/Claim by Carrier

Purpose: A list of patients for a given carrier with number of claims submitted. This is helpful for HMO's and other payment plans that might want to see how many patients you treated in the plan and how much you billed the plan.

Sort: The sort is will page break by carrier code and then list each patient alphabetic by patient last name.

Selection: The report selects all claims for a given carrier and between two dates.

Paper: Sent to default printer. This report is 83 columns with no special printer codes. It should print on most printers on 8.5" paper.

Procedure: At the Reports Main Menu press **[4]** for the "Insurance Carrier Reports Menu" then press **[C]** for Count Patients/Claims by Carrier. Supply the normal security information for HIPAA.

```
Change Printer Selection? (Y/N) >
```

Press **[Y]** to change the printer destination. Then the following prompt is offered:

```
Enter Primary Carrier Code: (BLANK for ALL) >
```

Then you must supply the date range. The default will be for the current month. Supply the starting date and then the closing date.

A detailed explanation of the data printed is included in the report summary. This was intended to try to get an encounter count for the patients, but the data can only count claims accurately.

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D - Patient Carrier History

Purpose: A list of patients insurance policies, both active and terminated policies. This can tell what patients were listed for a give carrier at a give time.

Sort: The sort is alphabetic by insurance carrier.

Selection: The report selects all carriers or selected carrier. Then policies by active date, defaulting to all policies on file.

Paper: Sent to default printer. This report is 83 columns with no special printer codes. It should print on most printers on 8.5" paper.

Procedure: At the Reports Main Menu press **[4]** for the "Insurance Carrier Reports Menu" then press **[D]** for Patient Carrier History. Supply HIPAA security information.

Change Printer Selection? (Y/N) >

Press **[Y]** to change the printer destination.

Enter Carrier Code: (Blank for ALL) >

Then supply the date range which will default to the earliest possible to the latest possible. Change this as required.