

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 **[4]** for the "Insurance Carrier Reports Menu" then press **[3]** for Employer Claim Count.

Change Printer Selection? (Y/N) >

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

The following prompt appears:

From Service Date: (MM/DD/YY) (**[ENTER]** for 01/28/93) >

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

End Service Date: (MM/DD/YY) (**[ENTER]** for 01/28/98) >

Enter the closing date or press **[ENTER]** 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? **[Y]** es **[N]** o **[X]** -Exit

Press **[ENTER]** or **[N]** if the selection is correct and the report will be generated. Press **[X]** to cancel the report. Or press **[Y]** 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 ½ " 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 **Run: Sep 4, 1996**
Performance by Carrier **Page: 1**
Jan - Dec 1996 **FOR RSP PARTY ALL**

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:

The screenshot shows a terminal window titled "MOS DEVELOPMENT". Inside, there are two main sections: "Field list" and "Sort definition".

Field list: A table of 24 fields arranged in three columns. Fields 1-8 are on the left, 9-16 in the middle, and 17-24 on the right. Below the table, it says "Press **[PgUp]** / **[PgDn]** to scroll, **[F5]** to toggle display".

1- Ins Company Code	9- Ins type	17- Company ID
2- Company Name	10- city	18- extra pat screen na
3- Address 1	11- state	19- form load name
4- Address 2	12- zip	20- submit through fast
5- Proc allow # (1-9)	13- phone extension	21- Crossover Carrier (
6- Attn:	14- on-line printing	22- Payor ID#
7- Telephone	15- batch printing	23- Claim Office #
8- Ins Form Name	16- Practice Id	24- Group Number

Sort definition: A section with four labels and their current values, each followed by a series of arrows for navigation. The values are: Sort Field: 2, Length: 30, Descending: (arrow), Subtotal Field: (arrow). Below this, it says "Press **[ESC]** To Record, **[Ctrl-C]** To Cancel".

At the bottom of the screen, it says "Press **[F10]** for help".

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					
+-----+					
Payor Claim					
Code	Company Name	ID	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 **[7]** from the "Insurance Carrier Reports Menu".

Change Printer Selection? (Y/N) >

Press **[Y]** 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".

Change Printer Selection? (Y/N) >

Press to change the printer destination.

Enter Patient Status Codes to Include:
Active, Inactive, Deceased, Terminated, Completed > AIDTC

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