Version Dependency

Oracle 5.4 SP1 CU05 or later
MS SQL 5.4 SP2 or later
2019 Q3A KnowledgeBase or later

Definitions

UI: User Interface

Additional Resources

Administrator’s Guide: The reports available in the panel-based UI have similar configuration options (e.g. filtering options) and are outlined in further detail in the Administrator’s Guide.

General Report Information

All of the reports are specific to data for a selected enterprise and accessed from the Reports tab on the Enterprise panel.

Enterprise level reports extract data only from a selected enterprise (i.e. Professional Main) while System level reports extract data from across all Enterprises.

At the System level (i.e. not at the Enterprise level), only the Summary Reports, Detail Reports, and KB Customization are available.
At the Enterprise level for both Professional and Facility, there are four subtabs under the Reports tab. They are the Summary Reports, Detail Reports, Custom Reports, and KB Customization.

For both the System and Enterprise level, the Reports tab contains a dashboard of high-level charts that show key indicators of the performance/value of the system. The data on the dashboard is based on the most recently ran report; whether the report was ran real-time or it was scheduled.

The Summary reports are comprised of three high-level reports:

- The Claim Edit Summary Report – Reports clean claims versus claims that fired an edit.
- The Flag Edit Summary report – Reports the flags or edits that occur the most.
- The Flag Status Summary report – Reports the number of claims that triggered a particular edit.

The data from these three reports makeup the dashboard on the Reports tab.

The Detail reports are comprised of two reports:

- Dropped Flags – Reports claims that had a flag that was dropped due to a drop flag.
- Rules that did not add edits – Reports all edits that did not fire in a particular timeframe. Clients utilize the report to identify which edits are of little value in order to determine if the edit should be removed from the ruleset.

The Custom Reports provide flexibility for the user and allows the user to define the claim data to pull from CES. Additional information can be found in the Panel Based UI Reports – Custom Reports job aid.

The KB Customization Report shows all KnowledgeBase overrides that affect claim editing.
Accessing the Reports

Log into CES: http://<hostname>:8080/ices/app. The user should change hostname to their internal machine name.

Navigate to Professional or Facility Editing and then to Reports > Reports.

Selecting the ‘Reports’ icon will direct the user to the Enterprise panel based Reports. Select the appropriate sub-report tab (Summary Reports, Detail Reports, or KB Customization). For Custom Reports refer to the CES Panel UI Reports_Custom Reports Job Aid.

Creating a New Report

In the chosen sub-report tab click on the Add a report button. This will prompt CES to ask the user to select the desired report type. Once the report type has been selected, the Properties tab will appear for the user to filter through the report criteria.

Report Criteria

Below are the various report criteria that the user may encounter in the reports. Please note that not all reports have all of the criteria listed below.

Name

The Reports can be renamed to meet business needs.

Report Type

Identifies the report type being utilized.

Days to Keep

Specifies the number of days the report should be retained before it is automatically deleted. The system will default to 14. A value of 1 - 9,999 is allowed.

Environment

The user can select to use either the Test or Live environment to query from. For instance, in a Live environment the user can select the Live environment to review claims and/or flags that have recently been processed or they can select Test to review the behavior of specific edits before making them Live in the Live environment.

Time Period

The user can select the desired time period. The definitions of each time period can be found in the Administrator’s Guide under the Time Period Dropdown section.
Panel Based UI Reports - Claims Edit System

Analysis type

- **Most recent analysis** – the data based on the claim’s most recent analysis in the system.
- **First time analysis** – the data based on the claim’s earliest analysis present in the system.

Scheduling

Select the *Run on a recurring schedule* checkbox in order to run the report on a periodic basis. A dropdown box will become available with options for Daily, Weekly, Monthly and Quarterly. Once the desired option has been selected, additional fields are displayed to allow the user to more precisely choose when the report is being generated.

Grouped by

Allows the user to choose the option to view the data by (claim) Count or Submitted charge.

Flag Status

- **Deny** – To view flags with a status of Deny.
- **Review** – To view flags with a status of Review.
- **Profile** – To view flags with a status of Profile.
- **All** – To view all flags

Rule engine

Allows the user to choose between ILOG and DDR or the user can select All to see data for both options.

Rule type

Allows the user to choose between System and Custom or the user can select All to see data for both options.

Rulesets

Allows the user to select specific rulesets along with the option to select all of the rulesets.

Code repository modules

Allows the user to select specific module in the Code Repository along with the option to select the entire repository.

Effective date

The effective date pertains to the date listed in Code Repository. The default value in the report is “no date chosen.” If a date value is entered, only those overrides that are effective on or after the specified date will be included in the report.
Expiration date

The expiration date pertains to the date listed in Code Repository. The default value in the report is “no date chosen.” If a date value is entered, only the overrides that expire on or before the specified date will be included in the report.

Override status

Allows the user to choose between Enabled and Disabled or the user can select All to see data for both options.

Type of claim (Facility Editing only)

Allows the user to choose either inpatient or outpatient claims.

Save

Once all the data has been inputted the Save button becomes enabled.

Run Report

Once the report has been saved the user can run the report at any time.

Unsaved Reports

When creating a report and exiting it before completing or selecting ‘Save’, the report will be displayed until you log out of the application or click out of the panel base. At that point the report will no longer exist.

Report Data Archive and Details

Report Data Archive Tab

The Report Data Archive tab will display summary information about the report.

Report Data Details

Clicking on a line in the Report Data Archive tab will open the details of the report as defined by the Report layout and Filter data in the Properties tab.

Export

To export a report as a CSV file, select the ‘Tools’ gear icon then select ‘Export listing to spreadsheet’.

Deleting a Report Run

Delete a report by clicking the Delete Report Run button. CES will verify if the user would like to delete the report run by having the user click on the Delete button.
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Report Examples

Claim Edit Summary

Live environment claim count report created from the previous six months.

![Report Run “Claim Edit Summary for Professional Main run 2/11/2020”](image)

Live environment submitted charge report created from the previous six months.

![Report Run “Claim Edit Summary for Professional Main run 2/18/2020”](image)
Flag Edit Summary

Top five flags that fired on Live environment claims for the previous month for all flag statuses.

Top 20 flags that fired on Live environment claims for the previous six months for all flag statuses.
Flag Status Summary

Flag statuses Count and Submitted Charges for Live environment claims for the past six months.

Dropped flags

All Live environment claims that have a dropped flag in the Live environment that had a Time period of ‘Today’.
**Rules that did not add edits**

All system and custom flags that have not fired in the prior six months.

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**KB Customization**

All Code Repository modules for all Rulesets with override status All (both enabled and disabled).