

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

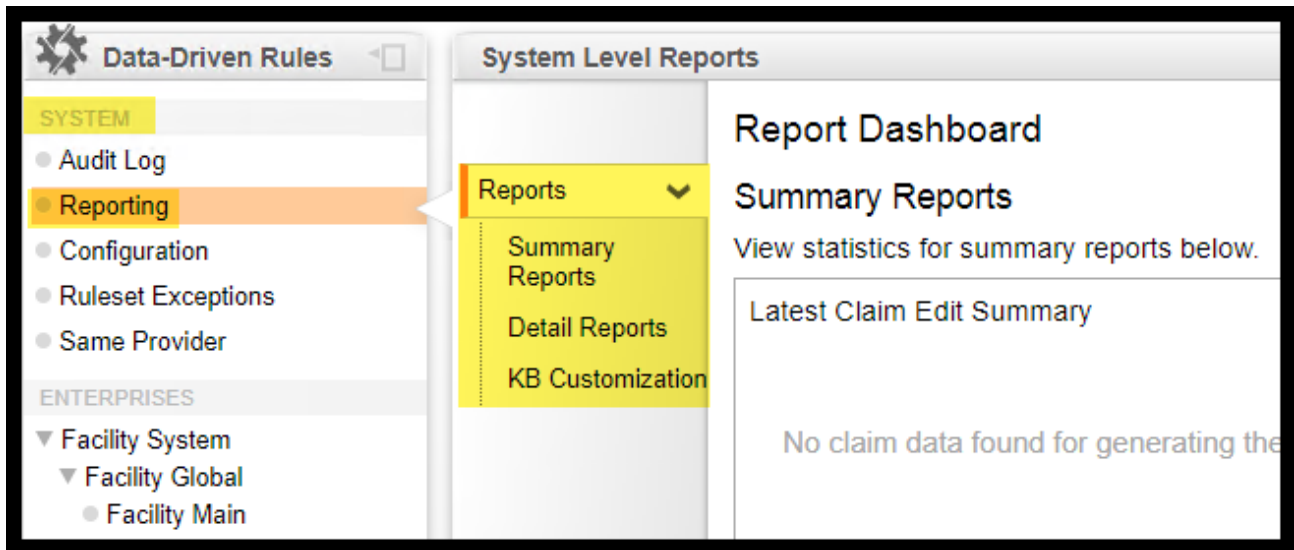
Administrator's Guide: The reports available in the panel-based UI have similar configuration options (e.g. filtering options) and are outlined in further detail in the Administrator's Guide.

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.



OPTUM™ Panel Based UI Reports - Claims Edit System

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.

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.

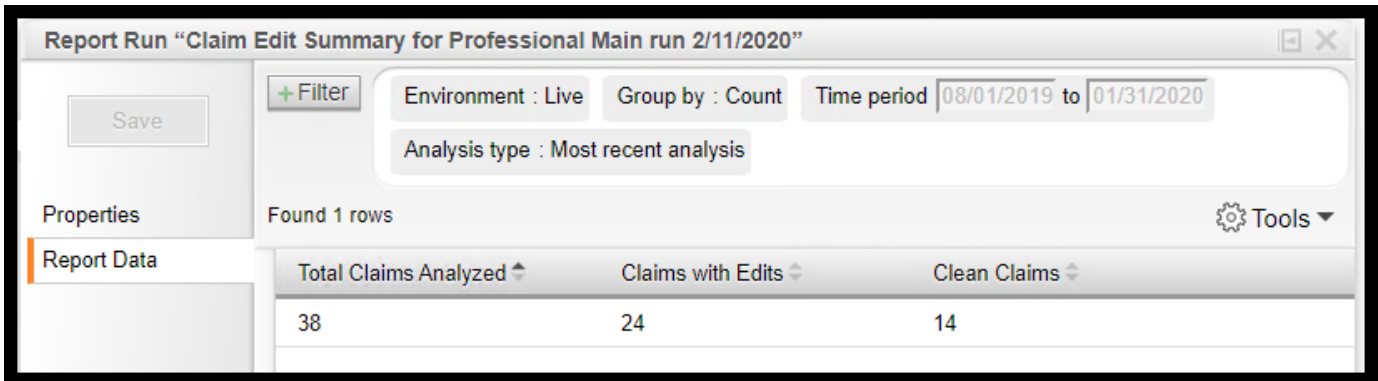
Deleting a Report

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

Report Examples

Claim Edit Summary

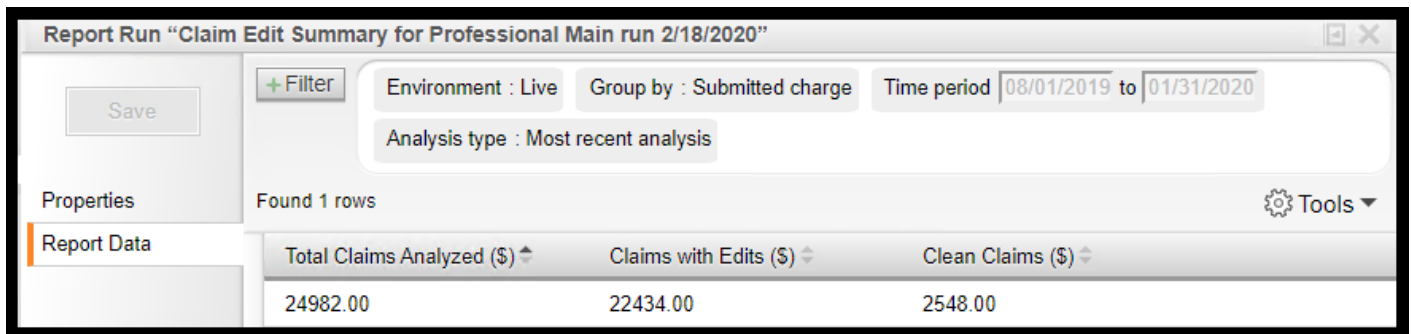
Live environment claim count report created from the previous six months.



The screenshot shows a report interface with a sidebar on the left containing 'Properties' and 'Report Data'. The main area has a 'Save' button and a '+ Filter' button. The report parameters are: Environment: Live, Group by: Count, Time period: 08/01/2019 to 01/31/2020, and Analysis type: Most recent analysis. It indicates 'Found 1 rows' and includes a 'Tools' dropdown menu. The data table below has three columns: Total Claims Analyzed, Claims with Edits, and Clean Claims.

Total Claims Analyzed	Claims with Edits	Clean Claims
38	24	14

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



The screenshot shows a report interface similar to the first one, but with 'Submitted charge' as the group by. The parameters are: Environment: Live, Group by: Submitted charge, Time period: 08/01/2019 to 01/31/2020, and Analysis type: Most recent analysis. It indicates 'Found 1 rows' and includes a 'Tools' dropdown menu. The data table below has three columns: Total Claims Analyzed (\$), Claims with Edits (\$), and Clean Claims (\$).

Total Claims Analyzed (\$)	Claims with Edits (\$)	Clean Claims (\$)
24982.00	22434.00	2548.00

OPTUM™ Panel Based UI Reports - Claims Edit System

Flag Edit Summary

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

Report Run "Flag Edit Summary for Professional Main run 2/18/2020"

Environment : Live Flag status : All Flags : Top 5 Time period 01/01/2020 to 01/31/2020

Analysis type : Most recent analysis

Found 5 rows

Flag	Flag Description	Count
sRM	[Pattern 28017] Blood Glucose...	24
mSX	[Pattern 10] Medicare Statutor...	4
sMUE	[Pattern 17683] DME Medically...	4
UNS	[Pattern 10372] Unspecified an...	4
MFD	Typical Daily Frequency Exceeded	3

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

Report Run "Flag Edit Summary for Professional Main run 2/11/2020"

Environment : Live Flag status : All Flags : Top 20

Time period 08/01/2019 to 01/31/2020 Analysis type : Most recent analysis

Found 20 rows

Flag	Flag Description	Count
sRM	[Pattern 28017] Blood Gl...	24
UNS	[Pattern 10372] Unspecifi...	11
TPL	[Pattern 4265] Third Part...	7
CS01	[Pattern CS0001] CS000...	4
mSX	[Pattern 10] Medicare St...	4
sMUE	[Pattern 17683] DME Me...	4
MFD	Typical Daily Frequency E...	3
mVP	[Pattern 20693] Medicare...	3
DAP	Deny Add-On Procedure	2
mMUE	[Pattern 17678] Practition...	2
mUN	[Pattern 24078] Medicare...	2
sFR	[Pattern 20357] Oregon ...	2
sRM	[Pattern 24276] PT, OT, a...	2
BMC01	null	1
CPT	[Pattern 4530] Invalid Pro...	1
IAP	Not a Frequent Diagnosis ...	1
ICD	[Pattern 8400] Invalid Dia...	1
ICR	[Pattern 8468] Anesthesi...	1
IMO	[Pattern 13248] Invalid M...	1
LBI	[Pattern 20079] LCD Rule	1

OPTUM™ Panel Based UI Reports - Claims Edit System

Flag Status Summary

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

Report Run "Flag Status Summary for Professional Main run 2/11/2020"

Save + Filter Environment : Live Time period 08/01/2019 to 01/31/2020
Analysis type : Most recent analysis

Properties Found 4 rows Tools

Report Data

Status	Count	Count(%)	Submitted Charge(\$)	Submitted Charge(%)
Deny	44	38.6	14472.52	56.8
Review	5	4.4	967.40	3.8
Profile	2	1.8	200	0.8
Clean	63	55.3	9842.88	38.6

Dropped flags

All Live environment claims that have a dropped flag in the Live environment that had a Time period of 'Today'.

Report Run "Dropped flags for Professional Main run 2/18/2020"

Save + Filter Environment : Live Flag status : All Time period 02/18/2020 to 02/18/2020

Properties Found 1 rows Tools

Report Data

Edit Scope	Claim ID	Claim Line ID	Dropped Edit Mnemonic	Drop Flag Rule Name	Other Edits	Submitted Charge(\$)	Analysis Date
Line	DROP20200217...	1	PCM	(DV) Drop Flag Vendor...		100.00	02/18/2020

Rules that did not add edits

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

Report Run "Rules that did not add edits for Professional Main-1 run 2/13/2020"

Found 28577 rows

Rule ID	Rule Name	Flag Mnemonic	Ruleset	Origin Enterprise	Rule Engine	Rule Type
100	Physician Interpretation Only Policy	mPI, sPI	Medicare PE (Static DDR)		DDR	System
100	Physician Interpretation Only Policy	mPI, sPI	Medicaid PE copy (Static DDR)		DDR	System
100	Physician Interpretation Only Policy	mPI, sPI	Medicaid PE (Static DDR)		DDR	System
	LCD Rule	LBI, LBP, LBS, LBT, LBM, BCC, BFR...	Medicare Professional (ILOG)	Professional System Enterprise	ILOG	System
	LCD Rule	LBI, LBP, LBS, LBT, LBM, BCC, BFR...	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
10000	CSHCN - Injection Antihemophilic ...	sMN	Medicaid PE (Static DDR)		DDR	System
	(UNL) Unlisted Procedure Code	UNL	Medicare Professional (ILOG)	Professional System Enterprise	ILOG	System
	(UNL) Unlisted Procedure Code	UNL	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(UNL) Unlisted Procedure Code	UNL	Commercial Professional (ILOG)	Professional System Enterprise	ILOG	System
	(UNB) Unbundle	HEX, HNB, HIN, UEX, UIN, UNB	test (ILOG)	Professional System Enterprise	ILOG	System
	(UNB) Unbundle	HEX, HNB, HIN, UEX, UIN, UNB	Default iLog (ILOG)	Professional System Enterprise	ILOG	System
	(UNB) Unbundle	HEX, HNB, HIN, UEX, UIN, UNB	Commercial Professional (ILOG)	Professional System Enterprise	ILOG	System
	(TRA) Rebundle	GRP, HRB, HRP, REB, TRA	Commercial Professional (ILOG)	Professional System Enterprise	ILOG	System
	(TPL) Third Party Liability	TPL	Medicare Professional (ILOG)	Professional System Enterprise	ILOG	System
	(TPL) Third Party Liability	TPL	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(TPL) Third Party Liability	TPL	Commercial Professional (ILOG)	Professional System Enterprise	ILOG	System
	(sUN) Medicaid National Correct C...	sUN, sUH	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(sTR)(sTRh) Medicaid Multiple The...	sTR, sTRh	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(sPD)(sPDh) Medicaid Professiona...	sPD, sPDh	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(sMUE) Medicaid Medically Unlikel...	sMUE	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(sMUE) Medicaid Medically Unlikel...	sMUE	Default iLog (ILOG)	Professional System Enterprise	ILOG	System
	(sMP)(sMPH)(sMP5) Medicaid Mult...	sMP, sMPH, sMP5	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(sER)(sERh) Medicaid Multiple En...	sER, sERh	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System
	(sDR)(sDRh) Medicaid Diagnostic ...	sDR, sDRh	Medicaid Professional (ILOG)	Professional System Enterprise	ILOG	System

KB Customization

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

Report Run "KB Customization report for Professional Main run 2/17/2020"

Found 12 rows

Module Name	Primary Code	State	Ruleset	Scope	Effective Date	Expiration Date	Status	Attribute-1	Attribute-2	Attribute-3
Modifiers	51	Original record	Professional Syst.		01/01/2004		Enabled	Description: Multiple ...	Category: CPT	Sub-category:
Modifiers	51	Overridden record	Professional Main...		01/01/2004		Enabled	Description: Multiple ...	Category: CPT	Sub-category:
Primary Procedures	20005	Original record	Professional Syst...		01/01/1993	12/31/2018	Enabled	Description: I&D SO...	Category: CPT	Sub-Category:
Primary Procedures	20005	Overridden record	Professional Main...		01/01/1993	12/31/2018	Enabled	Description: I&D SO...	Category: CPT	Sub-Category:
Primary Procedures	A4425	Original record	Professional Syst.		01/01/2004		Enabled	Description: OST PO...	Category: HCPCS	Sub-Category:
Primary Procedures	A4425	Overridden record	Professional Main...		01/01/2004		Enabled	Description: OST PO...	Category: HCPCS	Sub-Category:
Primary Procedures	G2067	Original record	Professional Syst...		01/01/2020		Enabled	Description: MEDICA...	Category: HCPCS	Sub-Category:
Primary Procedures	G2067	Overridden record	Professional Main...		01/01/2020		Enabled	Description: MEDICA...	Category: HCPCS	Sub-Category:
Procedure Maximu...	A4425	Original record	Professional Syst...		01/01/2018		Enabled	Max frequency per d...		
Procedure Maximu...	A4425	Overridden record	Professional Main...		01/01/2018		Enabled	Max frequency per d...		
Procedure Medicaid...	A7525	Overridden record	Professional Main...		10/01/2015		Enabled	Value: 4		
Procedure to Valid ...	G2067	Overridden record	Professional Main...		01/01/2020		Disabled			