REPORTS

The Duplicate Claims System includes an integrated reporting system that generates standard and custom reports. These reports facilitate resolution activities and support contractor and TMA auditing and management functions. In addition to the range of user-defined reports and graphs provided by the **R**eport function on the menu bar, the system provides the capability to download data to local tables. This capability, which is accessed through the **U**tility function on the menu bar, enables users to load Duplicate Claims System data into other database management or reporting software and subsequently generate a variety of ad hoc queries and reports. See Chapter 10, Addendum E for report descriptions and sample reports.

There are predefined and semi ad hoc reports and graphs available to DCS users. Each report/graph has one or two parameter screens which allow the user to refine the report by choosing specific criteria to report on. The following is a list of "standard" parameters/ criteria available for each report.

The "standard" parameters (available on most reports) are:

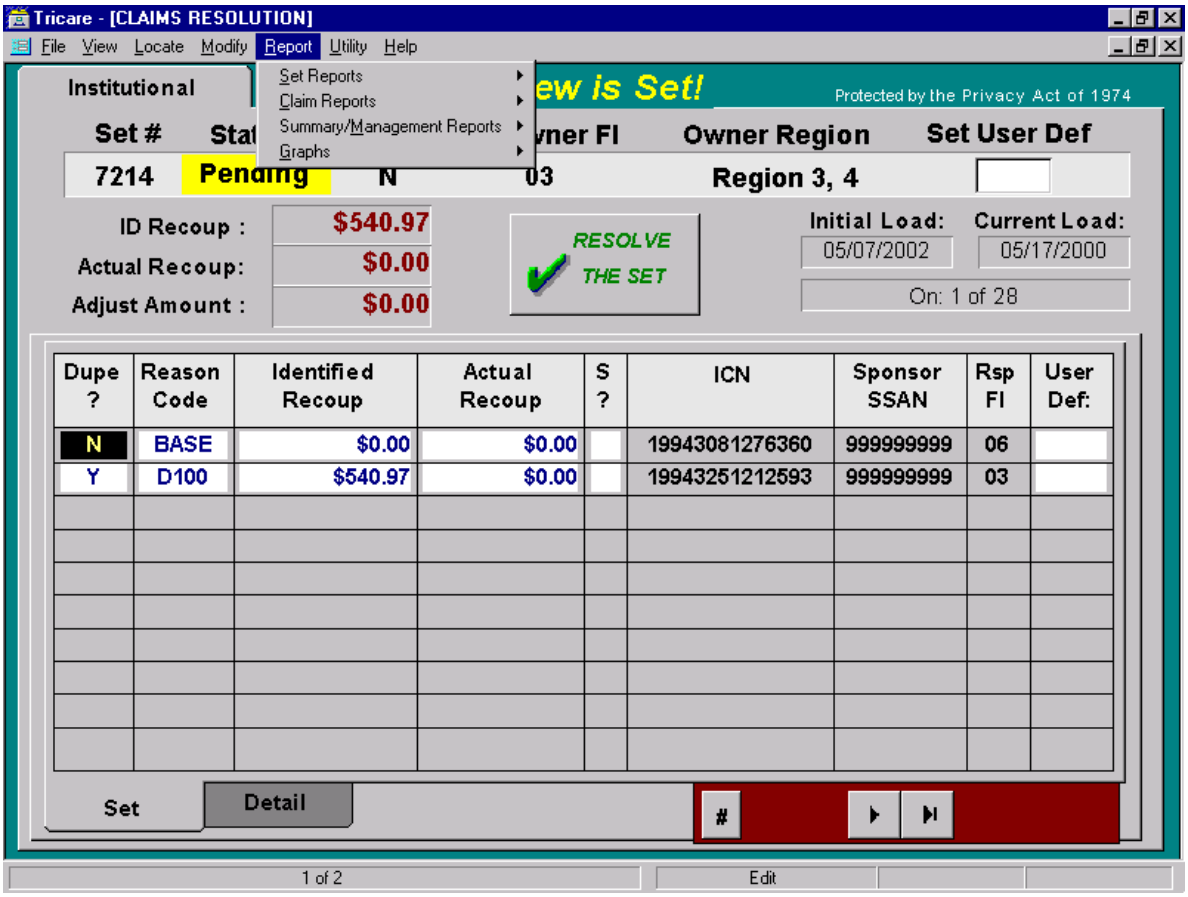
Claim Set Status	(All, O, P, V C)
Adjustments	(All, Non-adjusted Sets, Adjusted Sets)
Set Owner Type	(All, Multi FI, Single FI)
Claim Type	(All, Institutional, Non-institutional)
Match Type	(All, E, N, D, C, O)
Date Type	(Initial Load Date, Current Load Date, Last (Update) Date)
Set Range	(beginning and ending set numbers)
FI	(Select one from the list of available)
Region	(If FI selected, select one or more of available)

Some reports have other "special" parameters/criteria that may be selected depending on the report. (See Chapter 10, Addendum D for Report Descriptions and available parameters.)

When a user selects a report, a Report Parameter Screen will appear. Every Report Parameter Screen will contain a "Most Common" tab on which the available "standard" parameters applicable for the selected report will be displayed. If the report has associated "special" parameters available, a second "special" tab will be visible. Users may further refine their report criteria from the additional parameters on the "special" tab.

1.0. USING THE REPORT FUNCTION

FIGURE 10-8-1 REPORT CATEGORIES MENU

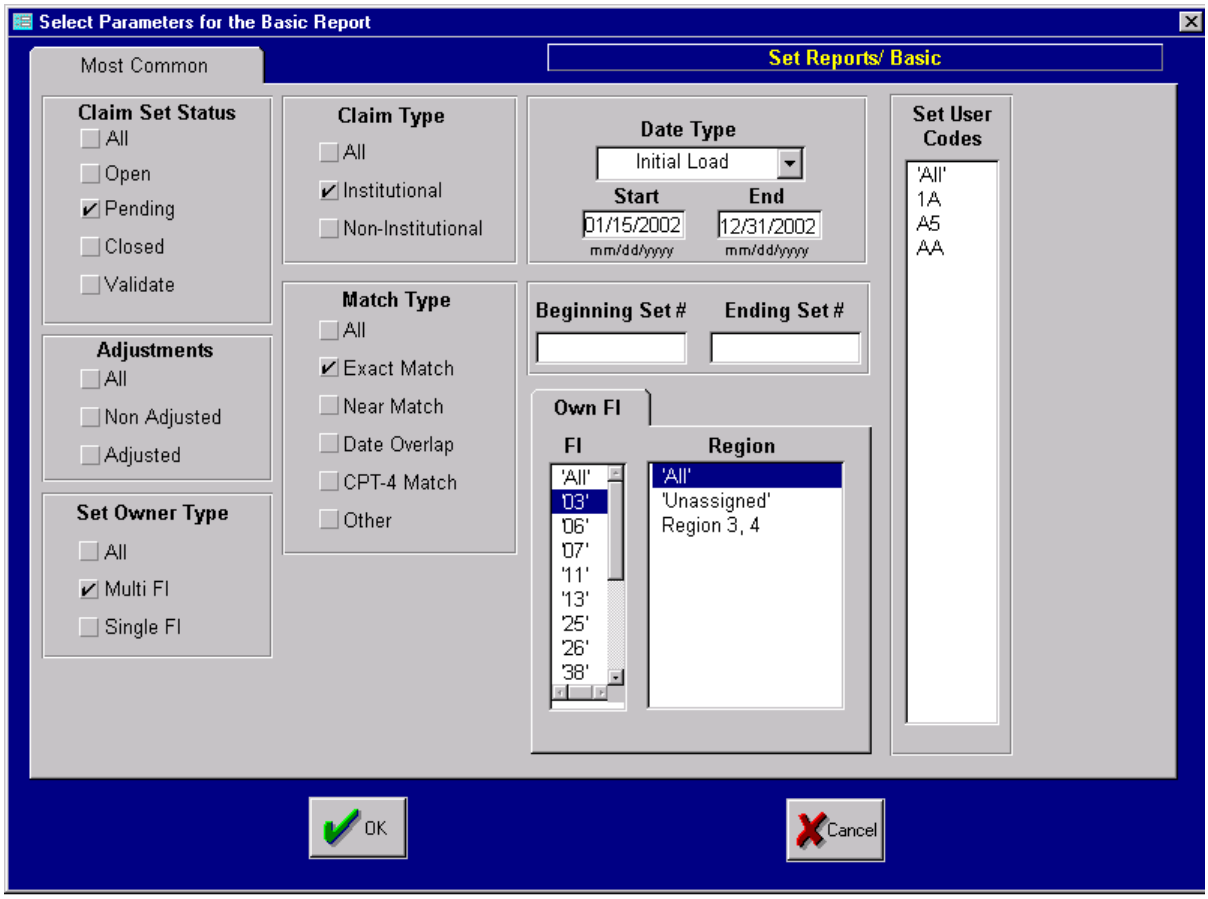


The menu bar on the top of every screen in the Duplicate Claims System includes a **R**eport function with a pull-down menu. When a user selects **R**eport from the menu bar, a report categories menu appears (shown in Figure 10-8-1, Report Categories Menu) to display the four selections available to the user:

- Set Reports
- Claim Reports
- Summary/Management Reports
- Graphs

When a user selects one of the report categories, a list of the available report formats for that category appears. When a report format is selected, a parameter screen appears and presents the user with available options for limiting the sets and claims to be included in the report. The report parameter screen resembles the **V**iew screen. A number of options are presented from which the user can define the data to be included in the report. Figure 10-8-2, Report Parameter Screen, shows an example of options available for selecting data to be included in a report.

FIGURE 10-8-2 REPORT PARAMETER SCREEN



Note that the system recognizes if the user is a TMA or contractor user and will display the appropriate options. For example, a contractor is able to print only their own data (i.e., sets assigned to this contractor or region) and not data of other contractors. TMA users are able to generate reports containing data from all contractors.

The report parameter screen presents available options for data selection criteria based on the user type and the type of report format selected. For example, some report formats permit users to include institutional data, non-institutional data, or both in a report. Other formats are exclusively dedicated to either institutional or non-institutional data. Some report formats permit users to include data based on a range of dates while others do not.

The parameter screen detects the user type and the report format selected and displays only those data selection criteria options available for the user and the selected format.

The date range options on the report parameter screen allow a user to specify a selection of sets or claims based on a range of different dates such as:

- Processed-to-Completion Date - the date when the claim was processed to completion.

- Initial Load Date – the date when the set was initially loaded into the Duplicate Claims System

- Current Load Date – the date when the set was loaded into the Duplicate Claims Database or when a claim was appended to the set or when set ownership was changed as a result of a mass change or a change in the **Owner FI** field).

- Last Update Date – the date when the set was last updated by a user or by the system.

After a user selects a report format and data parameters and clicks **OK**, the system informs the user of the number of records found which match the selection criteria. The system then prompts the user whether or not to continue. If the user wishes to continue and clicks 'Yes', the system creates the report and displays it on the user's screen.

The user may then choose to direct the report to a printer. Prior to printing a report, the user should ensure that the correct printer is set as the default printer and properly configured in Windows®. The correct printer can be selected and configured using the **SETUP** button on the Report menu bar above the Report display.

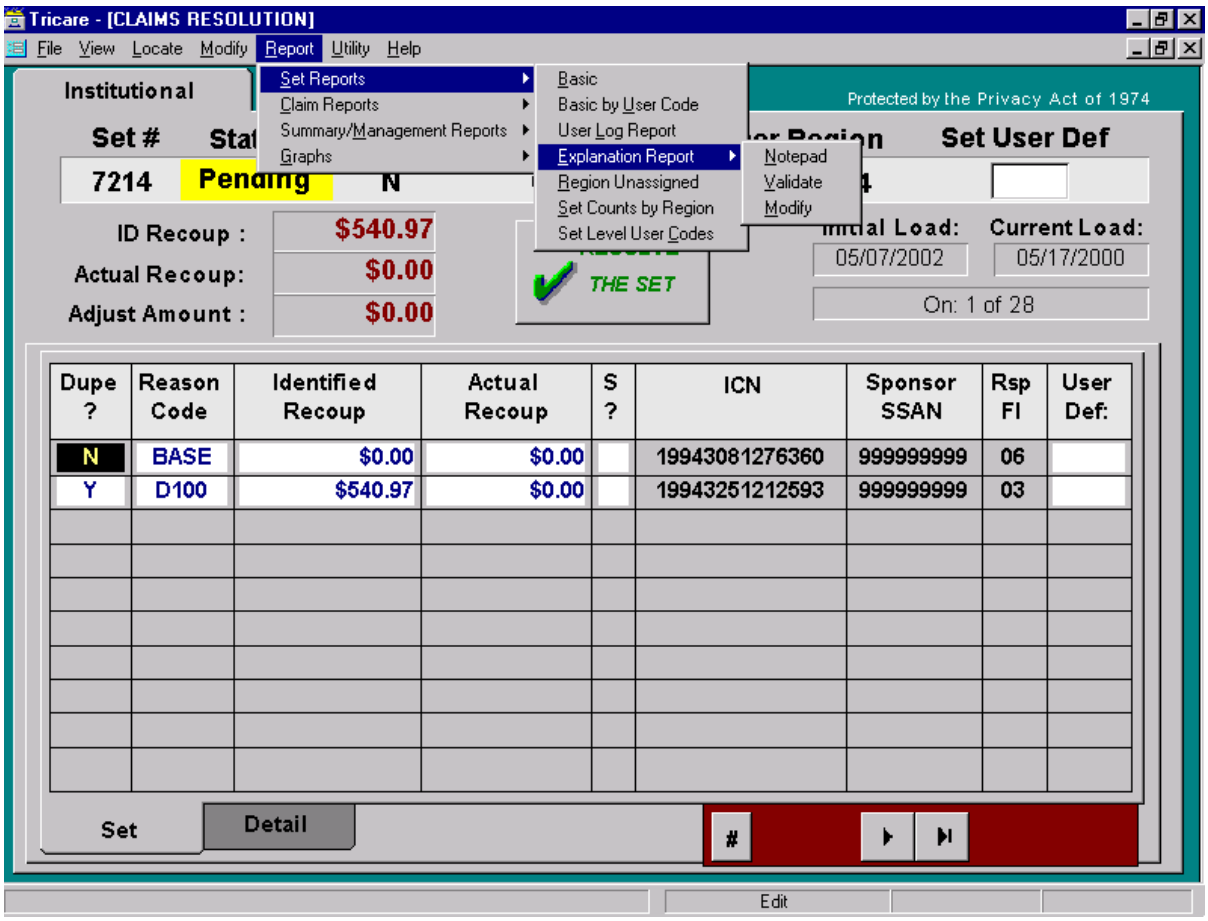
2.0. DESCRIPTION OF REPORTS

Chapter 10, Addendum D contains a description and a sample of all available reports. The system groups reports into four categories, which are described briefly below. The first two categories of reports are based on set characteristics and claim characteristics. The other two categories of reports provide a range of summary and management analyses as well as graphical presentations of data. Each of the four categories of reports are further defined by menus to specify report formats and screens on which report parameters can be specified.

2.1. Set Reports

Set reports contain set information based on selection criteria established by the user. In other words, if a set has met the selection criteria for a report, all claims in the set will be included. Set reports are defined through menu(s) of set report formats and report parameter screens. A sample of set report menus are shown in Figure 10-8-3.

FIGURE 10-8-3 SET REPORT MENU



2.2. Claim Reports

As the name suggests, claim reports contain listings of individual claims that meet specific criteria based on the report format selected and the filters applied by the user on the report parameter screen(s). Sample claim report menus are shown in Figure 10-8-4. Examples of claim reports are:

2.2.1. All institutional claims in sets assigned to a particular region grouped by set status.

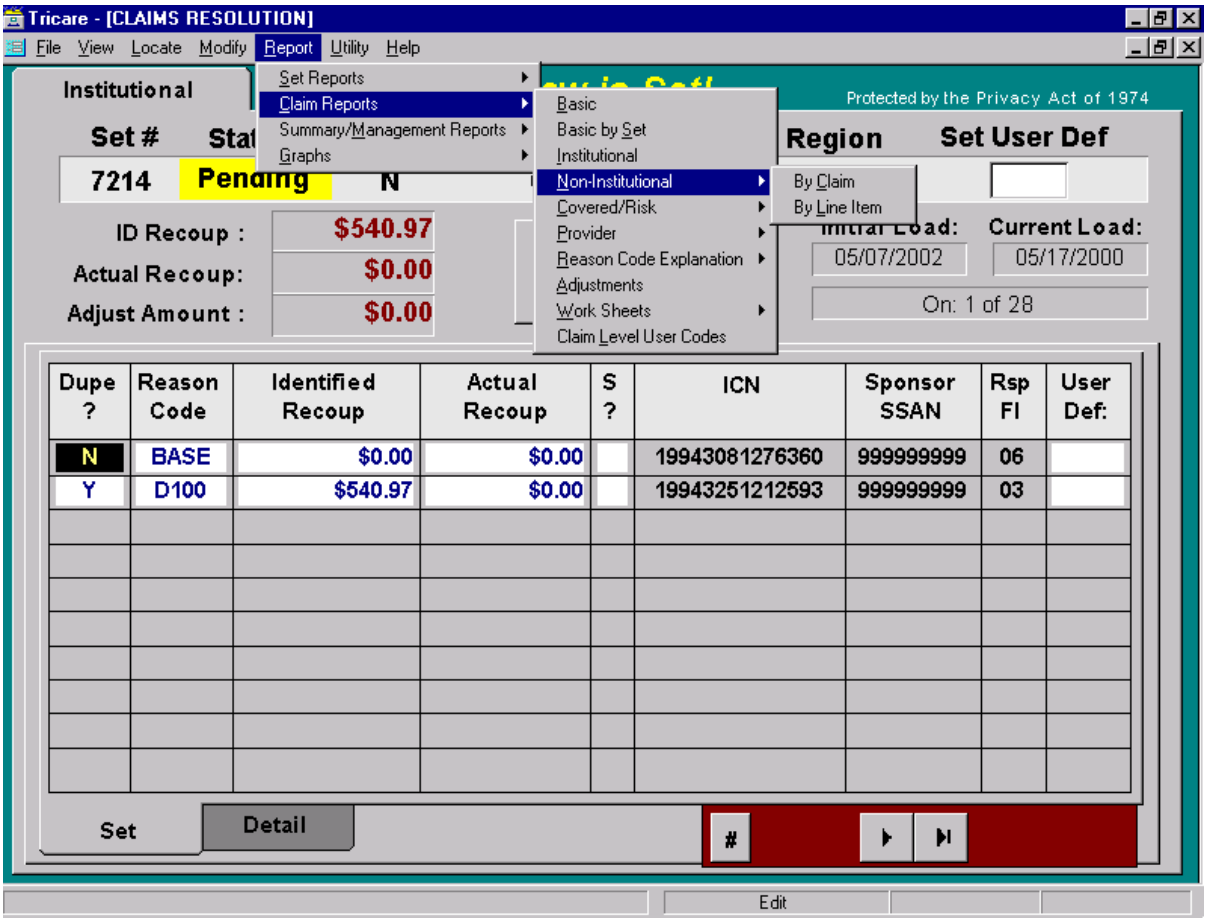
2.2.2. All claims in multi-contractor sets for a particular region by set status and within a specified initial load date time frame

2.2.3. All claims identified as an actual duplicate in a set with *Pending* status and with a last update date between a specified date range

2.2.4. All non-duplicates for a specified region which are not BASE claims.

2.2.5. Special report formats for Claim Reports have been developed for use by a contractor during the various stages of the claim set life cycle. For example, there is a report format that lists the claims identified as actual duplicates for which recoupment should be initiated. This report could be generated by a person researching potential duplicates and sent to the recoupment unit daily. Another report format lists those claims for which recoupments have been received. This report could be generated by a contractor finance unit and sent to the adjustment unit when adjustments/cancellation TEDs need to be submitted.

FIGURE 10-8-4 CLAIM REPORT MENU

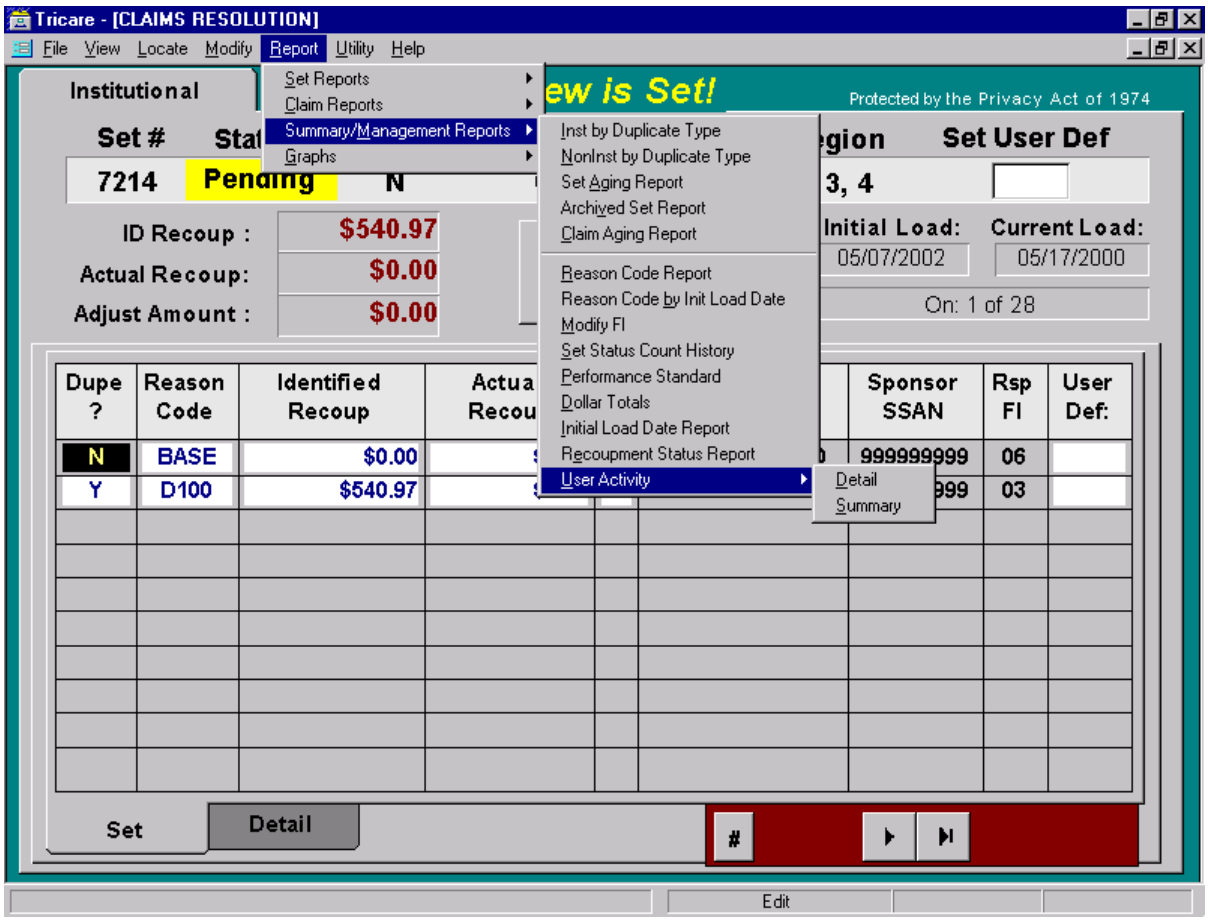


2.3. Summary/Management Reports

Summary/Management Reports display claims and other system data in formats which facilitate analyses and management functions. Sample summary/management report menus are shown in Figure 10-8-5. Examples of Summary/Management reports are:

- Set aging reports.
- Claim aging reports.
- Performance reports.

FIGURE 10-8-5 SUMMARY/MANAGEMENT REPORT MENU



2.4. Graphs

The Graphs category of reports displays data in graphical presentations that are useful in management analysis. For example, there is a graph that displays data regarding user activity. Another provides a graphical representation of actual versus potential duplicates.

The categories of report formats, in concert with report parameter screen options, provide users with flexible reporting tools to generate a wide range of reports. If a desired report cannot be devised through the use of the available report formats and the parameter screen options, users have the ability to download their data to their local hard drives, perform their own queries, and generate customized reports using their own database management spreadsheet, or report generation software.

See Chapter 10, Addendum E for available report formats.

3.0. USING THE UTILITY FUNCTION TO DOWNLOAD DATA FOR ADDITIONAL ANALYSIS

Users have the capability to download duplicate claims data to their local system for additional analyses and reporting. This feature permits downloading of a contractor's data to a local PC, where it can be accessed from a PC-based database management program (e.g., Paradox, Access, dBase, etc.) or a spreadsheet program or query/report generator. This feature permits the user to perform analyses and develop reports not available in the Duplicate Claims System. Depending on the volume of data associated with a particular contractor, the process of downloading data could take some time. Users should plan ahead and only perform data downloads during non-peak hours, since the PC may be unable to be used for resolving duplicate claims while the download process is being completed.

3.1. How To Download Data

To initiate a download, a user should first select **U**tility from the menu bar at the top of the screen. A pop-up menu appears explaining that the user can download the current "**V**iew" to local Paradox tables and local ASCII fixed length tables and save them to a directory of the user's choice by clicking the 'Yes' box. A 'No' box is also provided to cancel or change the request. If the user clicks 'Yes', a matrix is displayed showing the names and brief descriptions of tables that can be downloaded. The user should follow the directions provided and click on the table(s) to be downloaded. A check- mark (✔) will appear to indicate the table(s) that have been selected. The user also can change the default directory to specify another directory to which the download should be saved. Tables available for downloading are:

dcset	set level data
dcclm	claim level data
dcutlztn	line item data
dcutladj	adjustment data
dcsetcmt	set level comments
dccmnt	claim level comments
dcsetlog	set log
dcsetusr	set level user defined codes
dcclmusr	claim level user defined codes
dccount	set counts
dccontract	region table
dcsfi	FI/Contractor table
dcsreas	reason codes

While the download is being processed, the system will display the message: "Accessing Database.... Working.... Please Wait". This process can take several minutes or hours, depending on the number of claims/sets to be downloaded. If the download consists of 500 or more sets/claims, the user's screen-saver may activate and the Duplicate Claim System screen (with the message about waiting) may disappear. The screen may go blank. In effect, the PC will be inoperable until the download is completed. When the download is

completed, the claim screen or screen-saver will reappear. The download will create Paradox tables (files with extension of "db") and ASCII text files (files with extension of "txt").

The downloaded Paradox® tables carry the "key", or index field indicators, to enable users to access the tables for Paradox® reporting. No restructuring of the downloaded Paradox® tables is necessary prior to linking the tables for queries or reports. All a user has to do is open the desired Paradox® tables (using the full version of Paradox For Windows®) and proceed to link the applicable tables. Subsequently, users can perform queries and generate reports. If a user decides to use the ASCII fixed-length files to generate reports in a non- Paradox® environment, tables have to be defined in the database management software selected (dBase®, Access®, etc.) and the ASCII files imported. Chapter 10, Addendum E, Download Files, contains all of the information necessary to create the files, including the key or index fields.

It should be noted that downloaded files cannot be uploaded to TMA systems. This is a security feature to prevent corruption of the Duplicate Claims Database.

3.2. Specifying Data to be Downloaded

Data to be downloaded may be specified in two ways. First, users should set a view through the **V**iew function of the menu bar to select specific claim types, set statuses, FIs/ regions, match criteria, load dates, PTC dates, owner types, etc. Then, through the **D**ownload feature of the **U**tility function users may specify the data tables to include in the download.