NEXTGEN®EPM General Reports Overview

Introduction

The General Reports within EPM includes several different reporting options in which gather non-financial activity associated to patients. These reports include:

- Authorizations
- Claims Requests
- Docuscan Status
- Downtime Patient Listing by Provider
- Eligibility Referral
- Patient Chart Demographics
- Patient Insurance
- Patient Recall
- Person Employers
- Policy Holder
- Potential Duplicate Persons
- Significant Events
- Statements

To access the reports from the Main Toolbar go to Reports > General.

Authorizations

You can track insurance authorizations by using the Authorizations report.

- Gathers data from the chart authorizations
- By default, includes all authorizations, payers, renderings
- Filters can be set up by effective date, payer, number of encounters, number of encounters left, units, and number of units left.

Common uses include but are not limited to:

- Provides a means to update expired authorizations prior to their expiration.

Claims Requests

You can generate lists of claims for specific practices, encounters, and service locations with the Claim Requests report.

- You can drill down to the encounter associated to the reported claim.
- You can filter on Renderings, Locations, Payers, Financial Classes, Claim Types and Claim Forms.
Filter 1 Options:
- Create date is the date the encounter was billed and the claim was created and Process date is the date a paper claim is actually printed or the date in which the 837 file is generated for electronic claims.
- Provides a list of Pending and/or Archived claims. By default, pending claims is selected.
- Lists primary, secondary and tertiary claims. By default, primary is selected.
- Provides an option to display paper and/or electronic claims. By default, both are selected.
- If using claim acknowledgement reports (997’s), you have the ability to further filter the report by acknowledgment statuses.

Common uses include but are not limited to:
- Monitor and Track archived claims

**Docuscan Status**

If you have a Docuscan interface, this report can monitor the interface activity.
- Create date is the date in which the charge/payment was submitted through the interface.
- You can display successful and unsuccessful transmissions.

**Downtime Patient Listing by Provider**

The Downtime Patient Listing by Provider report lists information about all the active patients within your practice.
- Columns are limited to patient demographics, charge renderings, and locations
- If you pull in the Rendering column, the patient will display once for each rendering.

Common uses include but are not limited to:
- To provide patient information during any times when your system is down or off-line.
  You can print it on a weekly basis so that updated information is available. You can filter on create date, so you can print a list of patients added since your last print of the report.

**Eligibility Referral**

You can produce and Eligibility/Referral report to track eligibility and referral inquires.

Filter 1 Options:
- Create date is the date the eligibility/referral was transmitted.
- You can filter on Successful, Incomplete and/or Submit errors, physicians, practices, payers, providers, etc. based on the report criteria you select

заметка: Если вы не лицензированы на приложение Eligibility Referral, этот отчет недоступен.
**Patient Chart Demographics**

The **Patient Chart Demographics** report lists patients for the selected practice(s).
- Columns options include patient demographics, default chart details, marketing plan information.
- Rendering tab pulls from the default rendering selected on the chart details tab of the patient chart.
- You can filter on Patient Status, if enabled in practice preferences.

**Filter 1 Options:**
- Create date is the date that the chart was created.
- You can include or exclude expired patients.
- You can pull a list of patients that have not had an encounter created in a specific number of days.

**Filter 2 Options:**
- You can select patients greater than, less than or equal to a specific age, gender, and marital status.

**Patient Chart Demographics with Providers**

The **Patient Chart Demographics with Providers** pulls it data exactly like the Patient Chart Demographics; however, if a patient has more than one patient provider, you can add additional rows to this report for that patient.
- Columns options include patient demographics, default chart details, marketing plan information.
- Rendering tab pulls from the default rendering selected on the chart details tab of the patient chart.
- You can filter on Patient Status, if enabled in practice preferences.

**Filter 1 Options**
- Create date is the date that the chart was created.
- **Provider Effective Date is**
- You can include or exclude expired patients.
- You can pull a list of patients that have not had an encounter created in a specific number of days.
- **Provider Preferred Name is**

**Filter 2 Options**
- You can select patients greater than, less than or equal to a specific age, gender, and marital status.

**Patient Insurance**

The **Patient Insurance** report will provide a list of patients sorted by their insurance providers.
- There are several columns options that pull from the insurances attached to a patient.
- Def COB is the coordination of benefits associated to the chart level and Enc COB is the coordination of benefits associated to the encounter.
Filter 1 Options:
- Policy Effective Date is the effective date, if entered, on the insurance maintenance screen.
- Policy Expiration Date is the expiration date, if entered, on the insurance maintenance screen.
- Person Create Date is the date that the person record was created.
- Encounter Date is the billable date on the encounter maintenance screen.

Filter 2 Options:
- You can filter on patients that have the front and/or back of the insurance card scanned in to the application.
- Default COB is the coordination of benefits designated on the chart.

Patient Recall

The Patient Recall report will provide a list of patients that have recall plans associated to the chart.
- The column options are all geared towards the recall plan itself.
- Additional filters can be set for recall plans and practices.
- The Totals tab is not set up to include totals for this report.

Filter 1 Options:
- You can choose the Active Plans status, (include all, exclude, or only).

Filter 2 Options:
- Enables you to specify additional report criteria such as Recall Plan letter sent dates, the plan start and end dates, and the expected return date.

Person Employers

The Person Employers report enables you to generate lists of employers associated with your practice's patients and/or their relations.
- Pulls data from the Employers tab of the patient chart/person record
- In addition to employer information, you can pull in patient demographic information.
- Filters include Occupation, Primary Employer and Employment status.

Policy Holder

The Policy Holder report enables you to generate lists of guarantors and/or patients that are sorted by insurance providers.
- Columns include patient demographics, insurance information attached to the insurance.
  The insurance information pulls from the chart and the master file.

Filter 1 Options:
- Policy Effective Date is the effective date, if entered, on the insurance maintenance screen
• Policy Expiration Date is the expiration date, if entered, on the insurance maintenance screen.
• The Active indicator pulls from the insurance maintenance screen.

**Potential Duplicate HIN**

The Potential Duplicate HIN report lists all the people in the system that may have been entered into the system more than once.

- HIN means Health Identification Number.
- The report compares same last name, birth date and sex, or the same social security number.
- If the patient has multiple encounter numbers, the patient will display on the report one time for each encounter.
- It is not recommended to update or change any filter options.

**Significant Events**

The Significant Events report provides an audit or tracking of activity performed within the EPM application.

- Events tracked for selected significant events set in the preferences (Admin, Preferences, Significant Events)
- This report must be run within each practice.
- History is not recorded for system generated activity.
- Results will show pre-update and post-update information.
- Create date on filter 1 is the date in which the change took place.
- Additional filters include Creator and Significant Event Message.

**Statements**

The Statements report provides a list of accounts that generated a statement within a specific time period.

- Pulls data from the history section of the account.
- Displays one line for each statement created within the specified date range on filter 1.
- You can filter on Pat and/or Ins Amounts on filter 2.
- Additional filter options include Creator, Practice, Location and Rendering Physician.