Brokerage Report Matrix

(updated 7/29/2021)

While there are many reports in eXPRS and numerous ways for users to search for data, there are some key reports that are used most frequently by a Brokerage. Below is a matrix to help Brokerage users know which reports can give them the data they are most often looking for to conduct Brokerage business.

Please keep in mind that not all Brokerage users will have access to all reports. Access to a specific report is based on that Brokerage user's assigned eXPRS roles.

Brokerage Contractor reports

What information do I want?	What report can I find that in?	What Org level do I need?	Other ways to manually get the data or information?

I want a list of PSW providers from my CME's POC provider panel whose CHC and/or PEAA are due for renewal.	***CHC and PEAA Expiring***	Local Auth	There is no way to get this information for multiple PSWs manually.
			
			You can open an individual PSW's provider record to view when that PSW's CHC and/or PEAA are due to be renewed. Go to:
			• ***Provider → Provider Panel***
			  ○ In your POC Provider Panel Members page, click on the **Provider Panel Members** header to expand that section.
			  ○ Find the PSW provider you need from the list and click on their blue hyperlink name.
			  ○ Click on the **View Provider** button to go to that provider's record.
			  ○ In the provider's record, expand the **Credentials** section to view their CHC and/or PEAA information.

What information do I want?	What report can I find that in?	What Org level do I need?	Other ways to manually get the data or information?
I want to see what clients each of the PSWs on my CME POC provider panel have an employment relationship; allows the PSW to be paid for working with the client.	***Employer Relationships*** → See the user guide "***How to Run the PSW-Client Employer Relationships Report***" from the **eXPRS Help Menu** for more information.		There is no easy way to get this information for multiple PSWs or clients manually. You can open an individual PSW's provider record or the individual's View Client profile to view the Employer Relationships for that specific PSW or individual. To view by specific PSW, go to: • ***Provider → Provider Panel*** ○ In your POC Provider Panel Members page, click on the **Provider Panel Members** header to expand that section. ○ Find the PSW provider you need from the list and click on their blue hyperlink name. ○ Click on the **View Provider** button to go to that provider's record. ○ In the provider's record, expand the **Employment Relationship** section to view the individuals the PSW has an employment relationship. To view by specific individual, go to: • ***Client → View Client*** Enter the search criteria: • **Client Prime** = the individual's DHS prime number. • Click ***FIND*** From the results returned, click on the individual's last name to open the profile page. • Scroll to the bottom of the page and expand the **Employment Relationship** section to view the PSWs the individual has an employment relationship.

			→ See the user guide "***How to View PSW-Client Employer Relationship Info***" from the **eXPRS Help Menu** for more information.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to see if I have Plans of Care that are due to expire/be renewed.	***Expiring POC*** → See the user guide "***How to Run the POC Expire Report***" from the **eXPRS Help Menu** for more information.	Local Auth	You can also find POC information by searching manually. Go to: • ***Plan of Care → Plan of Care*** Enter the search criteria: ○ **Plan Begin** = first day of the time period you wish to search for. ○ **Plan End** = the last day of time period you wish to search for. ○ **Status** = Accepted • Click ***FIND*** You will get a list of POCs for for the date range you entered. You can then export the list of POCs returned for use externally to eXPRS.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to see what PSWs from my CME POC provider panel have approved EVV Exceptions.	***EVV Exceptions*** → See the user guide "***How to Run the EVV Exceptions Report***" from the **eXPRS Help Menu** for more information.	Local Auth	There is no easy way to get this information for multiple PSWs manually. You can open an individual PSW's provider record to view their EVV Exceptions for that PSW if they have one. To view by specific PSW, go to: • ***Provider → Provider Panel*** ○ In your POC Provider Panel Members page, click on the Provider Panel Members header to

			expand that section. ○ Find the PSW provider you need from the list and click on their blue hyperlink name. ○ Click on the **View Provider** button to go to that provider's record. ○ In the provider's record, expand the **EVV Exceptions** section to view the PSW's EVV exceptions, if they have any.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to see what ONAs are due to expire/be renewed.	**There is no specific report for this.**	Local Auth	There is no specific report to find expiring ONAs. You can do a specific search to find ONAs that are due to expire/be renewed. See the user guide "***How to Find Expiring ONAs***" from the **eXPRS Help Menu** for instructions.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to see if my CME has any outstanding liability amounts that are still owing/to be recovered from future claims.	***Outstanding Provider Liability***	Local Auth	You can also find your outstanding provider liability amounts by searching manually. Go to: • ***Liabilities → Provider Liability → View Provider Liability*** Enter the search criteria you wish to bring back a list of your outstanding provider liabilities. At least 1 search criteria must be entered to successfully search. • Click ***FIND*** You can then export the provider liability results list returned for use externally to eXPRS.

What information do I want?	What report can I find that in?	What Org level do I need?	Other ways to manually get the data or information?
I want to review the payment details for claims paid to my CME or under my CME's contract number for a period of time or specific SFMA run ID.	***Payment Detail*** → See the user guide "***How to Run Payment Detail Report***" from the **eXPRS Help Menu** for more information.	Local Auth	You can also find your claims paid in a specific SFMA run by searching manually. Go to: ○ ***Claims → Search/Update Claims*** Enter the search criteria you wish to bring back a list of claims. ○ **Status** = Approved ○ **Run ID** = the SFMA run ID *(same as the ACH* ***Invoice number*** *on your SFMA RA).* ***OR …*** ○ **Status** = Approved ○ **Provider ID** = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it. ○ **Effective Date** = enrollment start date you wish ○ **End date** = end date you wish, if any ○ Click ***FIND*** You can then export the claims results list returned for use externally to eXPRS. Then sum the Net Payment column to get a total payment amount for that SFMA run ID.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to get a list of PSW *(or other)* providers to see who has credentials that are expiring. Plus get an email list for my PSWs.	***Provider Status*** → See the user guide "***How to Use the Provider Status Report***" from the **eXPRS Help Menu** for more information.	Local Auth	There is no way to get this information for multiple PSWs manually. You can open an individual PSW's provider record to view when that PSW's CHC and/or PEAA or "approved to work" status are due to be renewed. Go to: • ***Provider → Provider Panel*** ○ In your POC Provider Panel Members page, click on

			the **Provider Panel Members** header to expand that section. ○ Find the PSW provider you need from the list and click on their blue hyperlink name. ○ Click on the **View Provider** button to go to that provider's record. ○ In the provider's record, expand the **Credentials** section to view credential information.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to review the claims paid to my CME or under my CME's contract number for a specific period of time or specific SFMA run ID.	***Remittance Advice***	Local Auth	You can also find your paid claims by searching manually. Go to: • ***Claims → Search/Update Claims*** Enter the search criteria you wish to bring back a list of claims, such as: ○ **Run ID** = the SFMA run ID *(same as the ACH **Invoice number** on your SFMA RA).* ***OR …*** ○ **Status** = Approved ○ **Effective Date** = the first service date you wish to view ○ **End Date** = the last service date you wish to view • Click ***FIND*** You can then export the claims results list to an Excel spreadsheet, the data and then be sorted/filtered to show specific details, as needed.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to review the claims paid to to my CME or under my CME's contract number for a specific calendar month.	***Remittance Advice Monthly*** → See the user guide "***How to Run***	Local Auth	You can also find your paid claims by searching manually. Go to: • ***Claims → Search/Update Claims*** Enter the search criteria you wish to bring back a list of claims, such as:

	Remittance Advice Monthly Summary Report" from the **eXPRS Help Menu** for more information.		○ **Status** = Approved ○ **Effective Date** = the first day of the service month you wish to view ○ **End Date** = the last day of the service month you wish to view • Click ***FIND*** You can then export the claims results list returned for use externally to eXPRS. If exported to an Excel spreadsheet, the data and then be sorted/filtered to show specific details, as needed.
What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want to know if a specific provider has suspended claims and why they may be suspended.	***Suspended Claim*** → See the user guide "***How to Access the Suspended Claim Report***" from the **eXPRS Help Menu** for more information.	Local Auth	You can also find suspended claims by searching manually. Go to: • ***Claims → Search/Update Claims*** Enter the search criteria you wish to bring back a list of claims. ○ **Status** = Suspended ○ **Provider ID** = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it. ○ **Effective Date** = first day of the time period you wish to search for. ○ **End Date** = the last day of time period you wish to search for. • Click ***FIND*** You can then export the claims results list returned for use externally to eXPRS. → See the user guide "***How to Review Claims***" and the "***Claims Problem Solving Matrix***" from the **eXPRS Help Menu** for more information.

Brokerage Case Management Provider reports

What information do I want?	What report can I find that in?	What Org level do I need?	Other ways to manually get the data or information?

I want to know the client enrollment for Case Management services with my CME.	***CM/PA Enrollment***	CM Provider	You can find your CME Case Management client enrollment by searching for a list of your CME's ***accepted*** CM CPAs.
			Go to:
			• ***Prior Authorization → Client Prior Auth → Find CPA***
			  ○ Search by:
			    ▪ **Status** = Accepted
			    ▪ **Service Element** = 148 – Personal Agent Services
			    ▪ **Effective Date** = enrollment start date you wish
			    ▪ **End date** = end date you wish, if any
			• Click ***FIND.***
			You will get a list of active CM CPAs for the date range you entered. You can then export the CPA results list returned for use externally to eXPRS.

What information do I want?	**What report can I find that in?**	**What Org level do I need?**	**Other ways to manually get the data or information?**
I want a summary of RFFS claims by service month that also includes any voided claims, as well as any Local Match claims.	***RFFS CDDP/ Brokerage by Service Month***	CM Provider	There is no other way to pull the data for this report manually.

What information do I want?	What report can I find that in?	What Org level do I need?	Other ways to manually get the data or information?
I want to get a summary list of claims by service month that show how many TXIX eligible claims and GF claims were paid.	***RFFS Claims Summary***	CM Provider	There is no other way to pull the data for this report manually.

What information do I want?	What report can I find that in?	What Org level do I need?	Other ways to manually get the data or information?
I want to see how much I was paid for RFFS Claims in a payment cycle, with access to the claims included in that payment & PLA details.	***RFFS Payment Detail***	CM Provider	You can find your RFFS Claims paid for a specific service month by searching manually. Go to: • ***CM/PA TCM Billing → RFFS Claims → View RFFS Claims*** Enter the search criteria to bring back a list of RFFS claims, use: ○ **Status =** Approved *(or other status you wish; leave as "select" to get all statuses)*. ○ **Effective date** = first date of service month ○ **End date** = last date of service month ○ Click ***FIND*** You can then export the claims results list returned for use externally to eXPRS.

What information do I want?	What report can I find that in?	What Org level do I need?	Other ways to manually get the data or information?
I want to know if I have suspended RFFS claims & why they may be suspended.	***Suspended Claim*** ****FYI: You will need to know your CM** (SE148) **Provider number to run this report.***	CM Provider	You can also find your suspended RFFS Claims or Encounters by searching manually. Go to: • ***CM/PA TCM Billing → RFFS Claims → View RFFS Claims*** Enter the search criteria you wish to bring back a list of RFFS claims or encounters.

	→ *See the user guide "**How to Access the Suspended Claim Report**" from the* ***eXPRS Help Menu** for more information.*		◦ **Status** = Suspended ◦ **Effective Date** = First day of the time period you wish to search for. ◦ **End Date** = the last day of time period you wish to search for. • Click **FIND** → See the user guides "***How to Review RFFS Claims***," and the "***RFFS Claim Problem Solving Matrix***" from the ***eXPRS Help Menu*** for more information.