Brokerage Report Matrix

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.

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***	Contractor	No easy way to find this information quickly, which is why we built the report. Instructions on how to use this report can be found here: https://apps.state.or.us/exprsDocs/HowToUseProviderStatusReport.pdf

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***	Contractor	No easy way to find this information quickly, which is why we built the report. Instructions on how to use this report can be found here: https://apps.state.or.us/exprsDocs/HowToRunRFFSPaymentDetail.pdf

What information do I want?	What report can I find that in?	What role do I need to be in?	Other ways to manually get the data or information?
I want to see how much I was paid for RFFS claims & if I have money that was recovered.	***RFFS CDDP\ Brokerage By Service Month Report***	CM Provider	No easy way to find this information quickly, which is why we built the report.
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 the list of RFFS Claims have been paid for a specific service month.	***No report for this at this time.***	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 you wish to bring back a list of paid claims, use: o **Effective date** = first date of service month o **End date** = last date of service month o **Status = Approved** (or other status you wish; leave as "select" to get all statuses). o **Max Displayed** = All • Click ***FIND*** • When your results list returns, click on the Export Option (such as Excel) to export your results to a format you can use and save.
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, in a simple summary format.	***RFFS Provider Payment Summary***	Contractor	No easy way to find this information quickly, which is why we built the report.

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 claims & why they may be suspended.	***Suspended Claim*** ******FYI*: You will need to know your CM (SE148) Provider number to run this report. → See the user guide "***How to Access the Suspended Claim Report***" from the eXPRS **HELP** menu for more information.	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. o **Effective Date** = First day of the time period you wish to search for. o **End Date** = the last day of time period you wish to search for. o **Status** = Suspended • 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.
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***	Contractor	Instructions for this report can be found here: https://apps.state.or.us/exprsDocs/HowToRunPOCExpireReport.pdf
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 list for a specific provider.	***Client Enrollment*** *And enter *(or search for)* the Provider ID for the	Contractor	You can find a provider's client service enrollment by going to: • ***Prior Authorization → Client Prior Auth → Find CPA*** **OR** ***Prior Authorization → Service Prior Auth → Find SPA***

	provider you want the enrollment for. → See the user guide "***[How to Run a Client Enrollment Report](#)***" from the eXPRS **HELP** menu for more information.		• Search by: o ***Provider ID*** = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it. o **Status** = Accepted o **Effective Date** = start date you wish o **End date** = end date you wish, if any • Click ***FIND*** You will get a list of active CPAs for that provider and the date range you entered. → See the user guide "***How to Find a CPA***" or "***How to Find POC Service Prior Authorizations***" from the **HELP** menu for more information.

Other reports available to Brokerages and their descriptions.

Report Name	Org Level I need to be in to access it.	Report Description
Employer Relationships	Contractor	To get a list of individuals/PSWs who have a confirmed Employer Relationship from PPL. Report instructions: https://apps.state.or.us/exprsDocs/HowToRunEmployerRelationshipsReport.pdf
Payment Detail	Contractor	This is a summary report for providers which shows payment information: the amounts claimed/billed, amounts of provider or client liability that reduced payments, and the net (actual) payment the provider received. In the HTML view, you can click on the blue hyperlink "PLA details" or "claim details" to view specific PLA or Claim details. Report Instructions: https://apps.state.or.us/exprsDocs/HowToRunPaymentDetail.pdf

Remittance Advice Monthly	Contractor or CM Provider	This is a monthly summary report of all SFMA payments made to a provider in that month. The report is only available in an Excel spreadsheet format.
Remittance Advice	Contractor or CM Provider	This is the payment report for each payment that is issued from eXPRS. It is essentially the "check stub" for the payment. It lists the specific details for that payment, including specific claims that were processed and paid in that payment, followed by summary pages. A final, grand total summary page will be at the end of the report.
RFFS Claim Summary	Contractor	Reports the total number of RFFS TXIX and GF claims approved for a specific SERVICE MONTH, and the total number of RFFS TXIX and GF claims that are suspended for "insufficient funds" for a specific SERVICE MONTH. Please note: the number of SUSPENDED claims may change over time, as they can be potentially picked up and paid in future RFFS payment cycles. Best practice will be to pull this report periodically over time to capture the updated suspended RFFS claim totals. This report will NOT correspond to any of the payment reports or payment dollar amounts received, as it is reporting data for SERVICE MONTHS, not months when the claim was actually paid. Report instructions: https://apps.state.or.us/exprsDocs/HowToUseRFFSClaimSummary.pdf

Other report options that may appear on your menu, but do not apply to Brokerage services. You may disregard these:

- Client Liability
- CPA Unclaimed Balance
- Outstanding Provider Liability
- Provider Payment Summary