CDDP 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 CDDP. Below is a matrix to help CDDP users know which reports can give them the data they are most often looking for to conduct CDDP 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***	Local Auth	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***	Local Auth	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 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 know who is due to have their adult eligibility re-determined for DD services.	***DD Adult Eligibility Due Dates***	Local Auth or CM Provider	There is no easy way to find this information in eXPRS, aside from looking up each individual client and viewing their DD Eligibility Dates via the ***VIEW CLIENT*** screens/panels.
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***	Local Auth	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 (SE48) 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***	Local Auth	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	Local Auth	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*** • Search by:

	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.		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.
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 what the client enrollment list for a specific service.	***Client Enrollment*** *And pick the service element you want the enrollment for. Leave the provider ID blank if you want all providers. → See the user guide "***How to Run a Client Enrollment Report***	Local Auth	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*** • 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

	" from the eXPRS **HELP** menu for more information.		• 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 CDDPs and their descriptions.

Report Name	Org Level I need to be in to access it.	Report Description
Client Liability	Local Auth	This report is to replace the old Provider Financial Statement report that providers used to get before services moved into eXPRS. For the date range selected, the report lists the client income and service liability (client "offset") information by month. For best results, pull the report by calendar month. Larger date ranges will result in very long report, as data is broken out by individual by month. Report instructions: https://apps.state.or.us/exprsDocs/HowToRunClientLiabilityReport.pdf
CPA Unclaimed Balance	Local Auth	This report helps providers to quickly see if they have claimed all they can for a CPA. The report shows the total amount authorized in accepted CPAs, the amount successfully claimed/paid against that CPA, and any balance remaining to be claimed/paid. This balance remaining could include claims that have been submitted but remain in a status other than "approved" (i.e.: not paid due to being suspended, draft, denied, etc. Report excludes SE54 for dates 10/1/11 and after. See the SE54 Daily Claims report for SE54 claim information after 10/1/11. Report instructions: https://apps.state.or.us/exprsDocs/HowToAccessUnclaimedBalance.pdf

Employer Relationships	Local Auth	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
Outstanding Provider Liability	Local Auth	This report shows any outstanding provider liability amount (amount a provider owes back to the State) yet to be paid/recovered from the provider.
Payment Detail	Local Auth	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	Local Auth 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	Local Auth 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	Local Auth	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
SEPA Detail	Local Auth	This is a report that shows a summary of the BA line information for a certain SEPA approval unit, by service element. You will need the SEPA ID number to use this report. When open, if you click on the blue "Prog Cd" hyperlink, you will get more details of that BA line, such as purpose statement, client information, notes and special condition, if any. The Budget Allocation report by also be useful for getting this information.