CDDP Report Matrix

(updated 8/5/2021)

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 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.

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

CDDP Local Authority 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*** o In your POC Provider Panel Members page, click on the Provider Panel Members header to expand that section. o Find the PSW provider you need from the list and click on their blue hyperlink name. o Click on the **View Provider** button to go to that provider's record. o 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 know the client enrollment list *for a specific service provider*.	***Client Enrollment***
	
	→ See the user guide "***How to Run a Client Enrollment Report***" from the **eXPRS Help Menu** for more information.
		Local Auth	You can find a specific service provider's client enrollment by searching for a list of the provider's ***accepted*** service authorizations. Go to:
			
			For Adult Group Home, Supported Living, or SE53 CPA Transportation, go to:
			• ***Prior Authorization → Client Prior Auth → Find CPA***
			 ○ Search by:
			  ▪ **Provider ID** = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it.
			  ▪ **Status** = Accepted
			  ▪ **Effective Date** = enrollment start date you wish
			  ▪ **End date** = end date you wish, if any
			 ○ Click ***FIND***
			
			For Foster Care, Children's Group Home, Children's Host Home, Employment, or other In-Home services, go to:
			• ***Prior Authorization → Service Prior Auth → Find SPA***
			 ○ Search by:
			  ▪ **Rendering/Agency eXPRS Provider ID** = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it.
			  ▪ **Status** = Accepted
			  ▪ **Effective Date** = start date you wish
			  ▪ **End date** = end date you wish, if any
			 ○ Click ***FIND***
			
			You will get a list of active CPAs or SPAs for that specific provider for the date range you entered.
			
			You can then export the authorizations results list returned

for use externally to eXPRS.

→ See the user guide "*How to Find a CPA*" or "*How to Find POC Service Prior Authorizations*" 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 a client in residential services has a service contribution (client liability) to pay to the provider, and how much it is.	*Client Liability*
	
	→ See the user guide *How to Run the Client Liability Report* from the **eXPRS Help Menu** for more information.
		Local Auth	You can also find client liability information by searching manually. Go to:
			• *Liabilities → Client Liabilities → View Client Liability*
			• Search by:
			   ○ **Effective Date** = the first date of the month you wish to view
			   ○ Enter additional search criteria if you wish**.**
			      ▪ **Zero Balance Accounts?** = **YES** is the default setting and will give you a list of all clients you have enrolled in your residential or foster care service.
			      ▪ Selecting **Zero Balance Accounts?** = **NO** will show give you just the clients who have a service contribution/client liability amount to pay.
			• Click *FIND*
			
			You can then export the CLA results list returned for use externally to eXPRS.
			
			→ *See the user guide How to Find & View Client Liability Amounts 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 a provider has gaps in submitting *residential service* claims.	*CPA Unclaimed Balance* *This report works*	Local Auth	There is no easy way to get this information. You can do a search for *approved* CPA claims. • *Claims → Search/Update Claims*

			Enter the search criteria:
	for CPA authorized services ONLY. → See the user guide "*How to Use the CPA Unclaimed Balance Report*" from the **eXPRS Help Menu** for more information.		○ **Status** = Approved ○ **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* Then export the claims results to an Excel spreadsheet, sort by claim dates, and then look for gaps in the dates claimed.
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 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 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***
			   o In your POC Provider Panel Members page, click on the **Provider Panel Members** header to expand that section.
			   o Find the PSW provider you need from the list and click on their blue hyperlink name.
			   o Click on the **View Provider** button to go to that provider's record.
			   o 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 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* OR *Provider Payment Summary*
	
	→ 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

			o **Effective Date** = the first service date you wish to view
			o **End Date** = the last service date 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 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 Remittance Advice Monthly Summary Report***" from the **eXPRS Help Menu** for more information.	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: o **Status** = Approved o **Effective Date** = the first day of the service month you wish to view o **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 a summary of my CME's funding allocation.	*SEPA Detail Report*	Local Auth	You can search for your SEPAs manually, if needed. To search for your SEPAs, go to: • *Prior Authorization → Service Element Prior Auth → Update SEPA Adjustments*.

Enter the search criteria you wish to bring back a list of your CME's SEPAs.

Clicking on the blue Unit ID number will open that SEPA so you can view its details.

You can export the SEPA 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 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.
			   o **Status** = Suspended
			   o **Provider ID** = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it.
			   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.
			• 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.

CDDP 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** = 48 – Case Management
			   ▪ **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 to know who is due to have their adult eligibility re-determined for DD services.	*DD Adult Eligibility Due Dates*	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. 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 **DD**

			Eligibility section to view the overall DD eligibility information for that individual.
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** (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.
			    ○ **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.