Agency & Foster Care Provider Report Matrix

(updated 2/20/2020)

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 Agency & Foster Care providers. Below is a matrix to help Agency & FC provider users know which reports can give them the data they are most often looking for to conduct business.

What information do I want?	What report can I find that in?	What role do I need to be in?	Other ways to manually find the data or information?
I want to see my client enrollment.	***Client Enrollment*** → See the user guide "***How to Run a Client Enrollment Report***" from the **HELP** menu for more information.	Provider	You can find your client service enrollment by going to: • ***Prior Authorization → Client Prior Auth → Find CPA*** **OR** ***Prior Authorization → Service Prior Auth → Find SPA*** • Search by: o **Status** = Accepted o **Service Element** = the service you want 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 or SPAs for that service for the date range you entered. Your "enrollment" for that service for that time period. → 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 role do I need to be in?	Other ways to manually find the data or information?
I want to see if a client I serve has a residential service contribution to pay (client liability), and how much it is.	***Client Liability***	Provider	You can also find client liability information by searching manually. Go to: • ***Liabilities → Client Liabilities → View Client Liability*** • Search by: o **Effective Date** = the first date of the month you wish to view o Enter additional search criteria if you wish. If you select "**Zero Balance Accounts** = NO", then the list will only show you clients who have a liability balance for the dates selected. Selecting = YES will give you all clients you serve in that service. • Click ***FIND***

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I want to see if I have any gaps in submitting ***residential service*** claims for the clients I serve. I am missing claims and thus missing funds paid.	***CPA Unclaimed Balance*** → See the user guide "***How to Use the CPA Unclaimed Balance Report***" from the **HELP** menu for more information.	Provider	No easy way to find this information quickly, which is why we built the report. ***This report works for CPA authorized services ONLY***.

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I want to know if I have suspended claims and why they may be suspended.	***Suspended Claim*** → See the user guide "***How to Access the Suspended Claim Report***" from the **HELP** menu for more information.	Provider	You can also find your suspended claims by searching manually. Go to: • ***Claims → View Claims*** Enter the search criteria you wish to bring back a list of claims. 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 guide "***How to Review Claims***" and the "***Claims Problem Solving Matrix***" from the **HELP** menu for more information.
What information do I want?	**What report can I find that in?**	**What role do I need to be in?**	**Other ways to manually find the data or information?**
I want to review the payment details for claims submitted for a period of time or specific SFMA run ID.	***Payment Detail***	Provider	No easy way to find this information quickly, which is why we built the report.

Other reports available to Providers and their descriptions.

Report Name	Report Description
Outstanding Provider Liability	This report shows any outstanding provider liability amount (amount a provider owes back to the State) yet to be paid/recovered from the provider.
Remittance Advice Monthly	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	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.