



## CDDP Report Matrix

(updated 3/27/2026)

The following matrix shows key reports that are used often by a CDDP. 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>I want a list of PSW providers from my CME's POC provider panel whose CHC and/or PEAA are due for renewal.</i>	<b>CHC and PEAA Expiring</b>	Local Auth	<p>There is no way to get this information for multiple PSWs manually.</p> <p>You can open an individual PSW's provider record to view when that PSW's CHC and/or PEAA are due to be renewed.</p> <p>Go to:</p> <ul style="list-style-type: none"><li>• <b>Provider</b> then <b>Provider</b> Panel<ul style="list-style-type: none"><li>- In your POC Provider Panel Members page, click on the Provider Panel Members header to expand that section.</li><li>- Find the PSW provider you need from the list and click on their blue hyperlink name.</li><li>- Click on the <b>View Provider</b> button to go to that provider's record.</li><li>- In the provider's record, expand the Credentials section to view their CHC and/or PEAA information.</li></ul></li></ul>

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?
<p><i>I want to know the client enrollment list <b>for a specific service provider.</b></i></p>	<p><b>Client Enrollment</b> See the user guide “How to Run a Client Enrollment Report” from the <b>eXPRS Help Menu</b> for more information.</p>	<p>Local Auth</p>	<p>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:</p> <ul style="list-style-type: none"> <li>• <b>Prior Authorization</b> then <b>Client Prior Auth</b> then <b>Find CPA</b></li> <li>• Search by: <ul style="list-style-type: none"> <li>– <b>Provider ID</b> = the provider’s eXPRS provider ID number. Use the binocs to search if you don’t know it.</li> <li>– <b>Status</b> = Accepted</li> <li>– <b>Effective Date</b> = enrollment start date you wish</li> <li>– <b>End date</b> = end date you wish, if any</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>For Foster Care, Children’s Group Home, Children’s Host Home, Employment, or other In-Home services, go to:</p> <ul style="list-style-type: none"> <li>• <b>Prior Authorization</b> then <b>Service Prior Auth</b> then <b>Find SPA</b></li> <li>• Search by: <ul style="list-style-type: none"> <li>– <b>Rendering/Agency eXPRS Provider ID</b> = the provider’s eXPRS provider ID number. Use the binocs to search if you don’t know it.</li> <li>– <b>Status</b> = Accepted</li> <li>– <b>Effective Date</b> = start date you wish</li> <li>– <b>End date</b> = end date you wish, if any</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>You will get a list of active CPAs or SPAs for that specific provider for the date range you entered.</p>

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?
<p><i>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.</i></p>	<p><b>Client Liability</b> See the user guide <i>How to Run the Client Liability Report</i> from the <b>eXPRS Help Menu</b> for more information.</p>	<p>Local Auth</p>	<p>You can then export the authorizations results list returned for use externally to eXPRS. See the user guide <i>“How to Find a CPA”</i> or <i>“How to Find POC Service Prior Authorizations”</i> from the <b>eXPRS HELP Menu</b> for more information.</p> <hr/> <p>You can also find client liability information by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>Liabilities</b> then <b>Client Liabilities</b> then <b>View Client Liability</b></li> <li>• Search by: <ul style="list-style-type: none"> <li>– <b>Effective Date</b> = the first date of the month you wish to view</li> <li>– Enter additional search criteria if you wish. <ul style="list-style-type: none"> <li>• <b>Zero Balance Accounts? = Yes</b> is the default setting and will give you a list of all clients you have enrolled in your residential or foster care service.</li> <li>• <b>Selecting Zero Balance Accounts? = No</b> will show give you just the clients who have a service contribution/client liability amount to pay.</li> </ul> </li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>You can then export the CLA results list returned for use externally to eXPRS. See the user guide <i>How to Find &amp; View Client Liability Amounts</i> from the <b>eXPRS Help Menu</b> for more information.</p>
<p><i>I want to see if a provider has gaps in submitting <b>residential service</b> claims.</i></p>	<p><b>CPA Unclaimed Balance</b></p>	<p>Local Auth</p>	<p>There is no easy way to get this information. You can do a search for <b>approved</b> CPA claims.</p> <ul style="list-style-type: none"> <li>• <b>Claims</b> then <b>Search/Update Claims</b></li> </ul>

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?
	<p>This report works for CPA authorized services <b>only</b>.</p> <p>See the user guide <i>"How to Use the CPA Unclaimed Balance Report"</i> from the <b>eXPRS Help Menu</b> for more information.</p>		<ul style="list-style-type: none"> <li>• Enter the search criteria: <ul style="list-style-type: none"> <li>- <b>Status</b> = Approved</li> <li>- <b>Provider ID</b> = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it.</li> <li>- <b>Effective Date</b> = first day of the time period you wish to search for.</li> <li>- <b>End Date</b> = the last day of time period you wish to search for.</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>Then export the claims results to an Excel spreadsheet, sort by claim dates, and then look for gaps in the dates claimed.</p>
<p><i>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.</i></p>	<p><b>Employer Relationships</b></p> <p>See the user guide <i>"How to Run the PSW-Client Employer Relationships Report"</i> from the <b>eXPRS Help Menu</b> for more information.</p>		<p>There is no easy way to get this information for multiple PSWs or clients manually.</p> <p>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.</p> <p>To view by specific PSW, go to:</p> <ul style="list-style-type: none"> <li>• <b>Provider</b> then <b>Provider Panel</b></li> <li>• In your POC Provider Panel Members page, click on the <b>Provider Panel Members header</b> to expand that section.</li> <li>• Find the PSW provider you need from the list and click on their <b>blue hyperlink name</b>.</li> <li>• Click on the <b>View Provider</b> button to go to that provider's record.</li> <li>• In the provider's record, expand the <b>Employment Relationship</b> section to view the individuals the PSW has an employment relationship.</li> </ul> <p>To view by specific individual, go to:</p>

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?
			<ul style="list-style-type: none"> <li>• <b>Client</b> then <b>View Client</b></li> <li>• Enter the search criteria: <ul style="list-style-type: none"> <li>– <b>Client Prime</b> = the individual’s DHS prime number.</li> <li>– Click <b>Find</b></li> </ul> </li> <li>• From the results returned, click on the individual’s last name to open the profile page.</li> <li>• Scroll to the bottom of the page and expand the <b>Employment Relationship section</b> to view the PSWs the individual has an employment relationship.</li> </ul> <p>See the user guide “How to View PSW-Client Employer Relationship Info” from the <b>eXPRS Help Menu</b> for more information.</p>
<p><i>I want to see if I have Plans of Care that are due to expire/be renewed.</i></p>	<p><b>Expiring POC</b> See the user guide “How to Run the POC Expire Report” from the eXPRS Help Menu for more information.</p>	<p>Local Auth</p>	<p>You can also find POC information by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>Plan of Care</b> then <b>Plan of Care</b></li> <li>• Enter the search criteria: <ul style="list-style-type: none"> <li>– <b>Plan Begin</b> = first day of the time period you wish to search for.</li> <li>– <b>Plan End</b> = the last day of time period you wish to search for.</li> <li>– <b>Status</b> = Accepted</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>You will get a list of POCs for the date range you entered. You can then export the list of POCs returned for use externally to eXPRS.</p>

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>I want to see what ONAs are due to expire/be renewed.</i>	<b>There is no specific report for this.</b>	Local Auth	<p>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.</p> <p>See the user guide <i>“How to Find Expiring ONAs”</i> from the <b>eXPRS Help Menu</b> for instructions.</p>
<i>I want to see what PSWs from my CME POC provider panel have approved EVV Exceptions.</i>	<p><b>EVV Exceptions</b></p> <p>See the user guide <i>“How to Run the EVV Exceptions Report”</i> from the <b>eXPRS Help Menu</b> for more information.</p>	Local Auth	<p>There is no easy way to get this information for multiple PSWs manually.</p> <p>You can open an individual PSW’s provider record to view their EVV Exceptions for that PSW if they have one.</p> <p>To view by specific PSW, go to:</p> <ul style="list-style-type: none"> <li>• <b>Provider</b> then <b>Provider Panel</b> <ul style="list-style-type: none"> <li>– In your POC Provider Panel Members page, click on the <b>Provider Panel Members</b> header to expand that section.</li> <li>– Find the PSW provider you need from the list and click on their <b>blue hyperlink name</b>.</li> <li>– Click on the <b>View Provider</b> button to go to that provider’s record.</li> <li>– In the provider’s record, expand the <b>EVV Exceptions</b> section to view the PSW’s EVV exceptions, if they have any.</li> </ul> </li> </ul>
<i>I want to see if my CME has any outstanding liability amounts that are still owing/to be recovered from future claims.</i>	<b>Outstanding Provider Liability</b>	Local Auth	<p>You can also find your outstanding provider liability amounts by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>Liabilities</b> the <b>Provider Liability</b> then <b>View Provider Liability</b></li> <li>• 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.</li> </ul>

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?
<p><i>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.</i></p>	<p><b>Payment Detail</b> Or <b>Provider Payment Summary</b> See the user guide "How to Run Payment Detail Report" from the <b>eXPRS Help Menu</b> for more information.</p>	<p>Local Auth</p>	<ul style="list-style-type: none"> <li>• Click <b>Find</b></li> </ul> <p>You can then export the provider liability results list returned for use externally to eXPRS.</p> <hr/> <p>You can also find your claims paid in a specific SFMA run by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>Claims</b> then <b>Search/Update Claims</b></li> <li>• Enter the search criteria you wish to bring back a list of claims. <ul style="list-style-type: none"> <li>- <b>Status</b> = Approved</li> <li>- <b>Run ID</b> = the SFMA run ID (same as the ACH Invoice number on your SFMA RA).</li> </ul> </li> <li>• Or <ul style="list-style-type: none"> <li>- <b>Status</b> = Approved</li> <li>- <b>Provider ID</b> = the provider's eXPRS provider ID number. Use the binocs to search if you don't know it.</li> <li>- <b>Effective Date</b> = enrollment start date you wish</li> <li>- <b>End date</b> = end date you wish, if any</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>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.</p>
<p><i>I want to get a list of PSW (or other) providers to see who has credentials that</i></p>	<p><b>Provider Status</b> See the user guide "How to Use the Provider Status Report" from the eXPRS Help</p>	<p>Local Auth</p>	<p>There is no way to get this information for multiple PSWs manually.</p> <p>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:</p>

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>are expiring. Plus get an email list for my PSWs.</i>	Menu for more information.		<ul style="list-style-type: none"> <li>• <b>Provider</b> then <b>Provider Panel</b> <ul style="list-style-type: none"> <li>- In your POC Provider Panel Members page, click on the <b>Provider Panel Members</b> header to expand that section.</li> <li>- Find the PSW provider you need from the list and click on their <b>blue hyperlink name</b>.</li> <li>- Click on the <b>View Provider</b> button to go to that provider's record.</li> <li>- In the provider's record, expand the <b>Credentials</b> section to view credential information.</li> </ul> </li> </ul>
<i>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.</i>	<b>Remittance Advice</b>	Local Auth	<p>You can also find your paid claims by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>Claims</b> then <b>Search/Update Claims</b></li> <li>• Enter the search criteria you wish to bring back a list of claims, such as: <ul style="list-style-type: none"> <li>- <b>Run ID</b> = the SFMA run ID (same as the ACH Invoice number on your SFMA RA).</li> </ul> </li> <li>• Or <ul style="list-style-type: none"> <li>- <b>Status</b> = Approved</li> <li>- <b>Effective Date</b> = the first service date you wish to view</li> <li>- <b>End Date</b> = the last service date you wish to view</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>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.</p>

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?
<p><i>I want to review the claims paid to my CME or under my CME's contract number for a specific calendar month.</i></p>	<p><b>Remittance Advice Monthly</b> See the user guide "How to Run Remittance Advice Monthly Summary Report" from the <b>eXPRS Help Menu</b> for more information.</p>	<p>Local Auth</p>	<p>You can also find your paid claims by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>Claims</b> then <b>Search/Update Claims</b></li> <li>• Enter the search criteria you wish to bring back a list of claims, such as: <ul style="list-style-type: none"> <li>– <b>Status</b> = Approved</li> <li>– <b>Effective Date</b> = the first day of the service month you wish to view</li> <li>– <b>End Date</b> = the last day of the service month you wish to view</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>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.</p>
<p><i>I want a summary of my CME's funding allocation.</i></p>	<p><b>SEPA Detail Report</b></p>	<p>Local Auth</p>	<p>You can search for your SEPAs manually, if needed. To search for your SEPAs, go to:</p> <ul style="list-style-type: none"> <li>• <b>Prior Authorization</b> then <b>Service Element Prior Auth</b> then <b>Update SEPA Adjustments.</b></li> <li>• Enter the search criteria you wish to bring back a list of your CME's SEPAs.</li> <li>• Clicking on the blue Unit ID number will open that SEPA so you can view its details.</li> <li>• You can export the SEPA results list returned for use externally to eXPRS.</li> </ul>

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?
<p><i>I want to know if a specific provider has suspended claims and why they may be suspended.</i></p>	<p><b>Suspended Claim</b> See the user guide “How to Access the Suspended Claim Report” from the <b>eXPRS Help Menu</b> for more information.</p>	<p>Local Auth</p>	<p>You can also find suspended claims by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>Claims</b> then <b>Search/Update Claims</b></li> <li>• Enter the search criteria you wish to bring back a list of claims. <ul style="list-style-type: none"> <li>– <b>Status</b> = Suspended</li> <li>– <b>Provider ID</b> = the provider’s eXPRS provider ID number. Use the binocs to search if you don’t know it.</li> <li>– <b>Effective Date</b> = first day of the time period you wish to search for.</li> <li>– <b>End Date</b> = the last day of time period you wish to search for.</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>You can then export the claims results list returned for use externally to eXPRS.</p> <p>See the user guide “How to Review Claims” and the “Claims Problem Solving Matrix” from the <b>eXPRS Help Menu</b> for more information.</p>

## 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>I want to know the client enrollment for Case Management services with my CME.</i>	<b>CM/PA Enrollment</b>	CM Provider	<p>You can find your CME Case Management client enrollment by searching for a list of your CME's accepted CM CPAs.</p> <p>Go to:</p> <ul style="list-style-type: none"> <li>• <b>Prior Authorization</b> then <b>Client Prior Auth</b> then <b>Find CPA</b></li> <li>• Search by: <ul style="list-style-type: none"> <li>– <b>Status</b> = Accepted</li> <li>– <b>Service Element</b> = 48 – Case Management</li> <li>– <b>Effective Date</b> = enrollment start date you wish</li> <li>– <b>End date</b> = end date you wish, if any</li> </ul> </li> <li>• Click <b>Find</b>.</li> </ul> <p>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.</p>
<i>I want to know who is due to have their adult eligibility re-determined for DD services.</i>	<b>DD Adult Eligibility Due Dates</b>	CM Provider	<p>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 <b>View Client</b> screens/panels.</p> <p>To view by specific individual, go to:</p> <ul style="list-style-type: none"> <li>• <b>Client</b> then <b>View Client</b></li> <li>• Enter the search criteria: <ul style="list-style-type: none"> <li>– <b>Client Prime</b> = the individual's DHS prime number.</li> </ul> </li> </ul>

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?
			<ul style="list-style-type: none"> <li>- Click <b>Find</b></li> <li>• From the results returned, click on the individual's last name to open the profile page.</li> <li>• Scroll to the bottom of the page and expand the <b>DD Eligibility</b> section to view the overall DD eligibility information for that individual.</li> </ul>
<p><i>I want a summary of RFFS claims by service month that also includes any voided claims, as well as any Local Match claims.</i></p>	<p><b>RFFS CDDP/ Brokerage by Service Month</b></p>	<p>CM Provider</p>	<p>There is no other way to pull the data for this report manually.</p>
<p><i>I want to get a summary list of claims by service month that shows how many TXIX eligible claims and GF claims were paid.</i></p>	<p><b>RFFS Claims Summary</b></p>	<p>CM Provider</p>	<p>There is no other way to pull the data for this report manually.</p>
<p><i>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 &amp; PLA details.</i></p>	<p><b>RFFS Payment Detail</b></p>	<p>CM Provider</p>	<p>You can find your RFFS Claims paid for a specific service month by searching manually.</p> <p>Go to:</p> <ul style="list-style-type: none"> <li>• <b>CM/PA TCM Billing</b> then <b>RFFS Claims</b> then <b>View RFFS Claims</b></li> <li>• Enter the search criteria to bring back a list of RFFS claims, use: <ul style="list-style-type: none"> <li>- <b>Status</b> = Approved (or other status you wish; leave as "select" to get all statuses).</li> </ul> </li> </ul>

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?
			<ul style="list-style-type: none"> <li>- <b>Effective date</b> = first date of service month</li> <li>- <b>End date</b> = last date of service month</li> <li>• Click <b>Find</b></li> </ul> <p>You can then export the claims results list returned for use externally to eXPRS.</p>
<p><i>I want to know if I have suspended RFFS claims &amp; why they may be suspended.</i></p>	<p><b>Suspended Claim</b>            You will need to know your <b>CM (SE48) Provider number</b> to run this report.            See the user guide <i>"How to Access the Suspended Claim Report"</i> from the <b>eXPRS Help Menu</b> for more information.</p>	<p>CM Provider</p>	<p>You can also find your suspended RFFS Claims or Encounters by searching manually. Go to:</p> <ul style="list-style-type: none"> <li>• <b>CM/PA TCM Billing</b> then <b>RFFS Claims</b> then <b>View RFFS Claims</b></li> <li>• Enter the search criteria you wish to bring back a list of RFFS claims or encounters.               <ul style="list-style-type: none"> <li>- <b>Status</b> = Suspended</li> <li>- <b>Effective Date</b> = First day of the time period you wish to search for.</li> <li>- <b>End Date</b> = the last day of time period you wish to search for.</li> </ul> </li> <li>• Click <b>Find</b></li> </ul> <p>See the user guides <i>"How to Review RFFS Claims,"</i> and the <i>"RFFS Claim Problem Solving Matrix"</i> from the <b>eXPRS Help Menu</b> for more information.</p>