



Statistical Report Mapping

Santrax Agency Management

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Statistical Report Mapping

Below is the set up required for mapping DOH statistical reports. For these reports to return accurate data it is essential that all mapping is complete prior to running any of the reports.



Note:

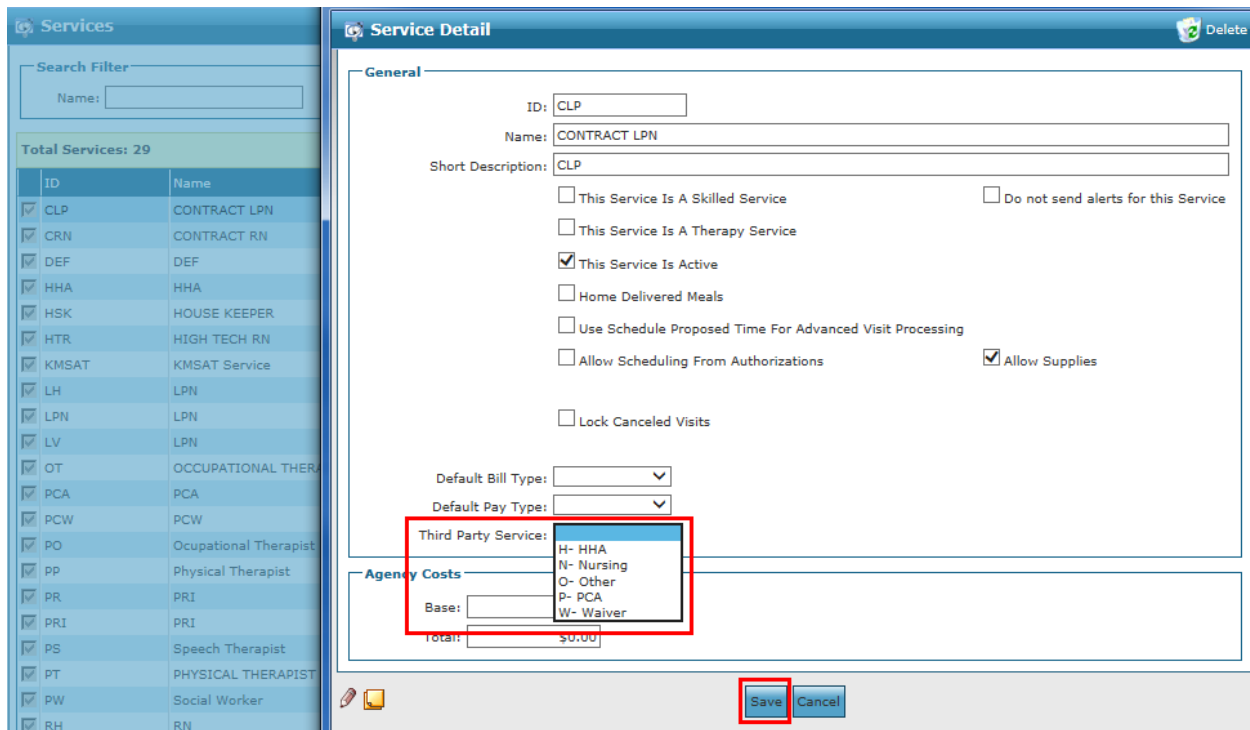
Ensure that you review the DOH Statistical Report questions as the report does change annually, and the mapping such as the Discharge Type may need to be adjusted.

Mapping the Services

For reports to group services and calculate totals, all applicable services must be mapped to standardized **Third Party Services**.

(Path: **Admin > System Setup > Services**)

1. Double click a service to open the **Service Detail** screen.
2. Select a **Third Party Service**.
3. Click **Save**.



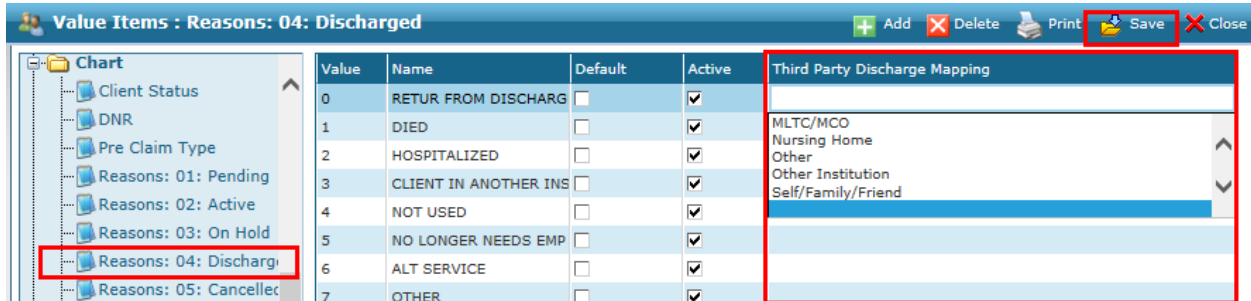
The screenshot shows the 'Services' application interface. On the left is a list of services with checkboxes. The 'Service Detail' window is open for the 'CONTRACT LPN' service. The 'General' tab is active, showing fields for ID, Name, and Short Description. Below these are several checkboxes for service characteristics. At the bottom, the 'Third Party Service' dropdown menu is open, showing options: H- HHA, N- Nursing, O- Other, P- PCA, and W- Waiver. The 'Save' button is highlighted with a red box.

Mapping the Discharge Type

For the **Discharge by Type** section of reports to calculate totals, all applicable discharge reasons must be mapped to standardized **Third Party Discharge Reasons**.

(Path: **Admin > System Setup > Value Items > Chart - Reason: 04 Discharged > Third Party Referral Mapping**)

1. Select a discharge reason in the **Third Party Discharge Mapping** column, for each discharge reason listed.
2. Click **Save**.



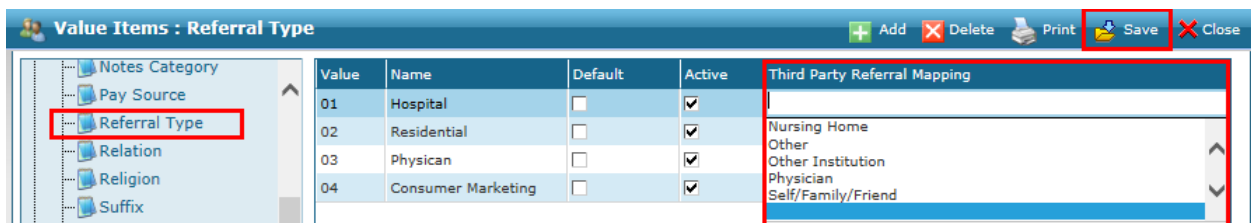
Value	Name	Default	Active	Third Party Discharge Mapping
0	RETUR FROM DISCHARG	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
1	DIED	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MLTC/MCO
2	HOSPITALIZED	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Nursing Home
3	CLIENT IN ANOTHER INS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other
4	NOT USED	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other Institution
5	NO LONGER NEEDS EMP	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Self/Family/Friend
6	ALT SERVICE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
7	OTHER	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Mapping the Referral Type

For the **Admission Source** section of reports to calculate totals, all applicable referral types must be mapped to a standardized third party referral type.

(Path: **Admin > System Setup > Value Items > General > Referral Type**)

1. Select a discharge reason in the **Third Party Discharge Mapping** column, for each discharge reasons listed.
2. Click **Save**.



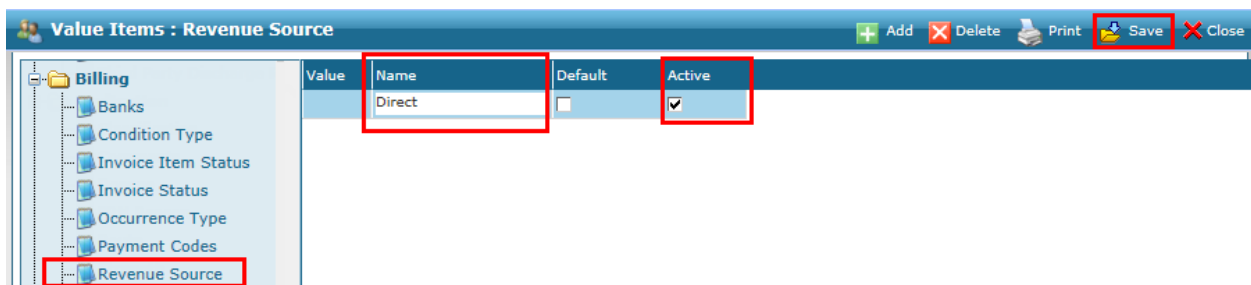
Value	Name	Default	Active	Third Party Referral Mapping
01	Hospital	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
02	Residential	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Nursing Home
03	Physican	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other
04	Consumer Marketing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Other Institution
				Physician
				Self/Family/Friend

Creating Revenue Source Categories

For the **Revenue Source** section of reports to calculate totals, revenue source categories (Example: Direct vs. Contract) must be created and assigned to each payer.

(Path: **Admin > System Setup > Value Items > Billing > Revenue Source**)

1. Click **Add**.
2. Enter the **Name** of the revenue source.
3. Select the checkbox in the **Active** column.
4. Click **Save**.



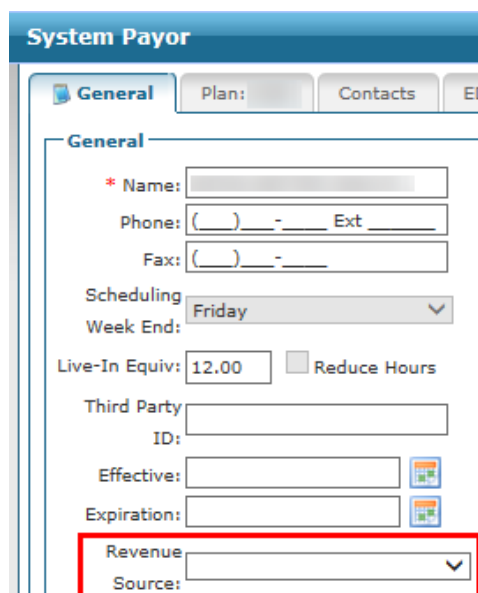
Assigning Revenue Source Categories

(Path: **Billing > Payor**)

1. Select the payer.
2. Select the **Revenue Source** in the **General** section.
3. Click **Save**.

Repeat this process for each applicable payer.

Note: To report data for a single payer contract filter the Statistical Revenue Summary Report by that payer.



Reports

Statistical Contract Form Summary

Description:

This report displays a summary with totals of billable hours and hourly rates charged for those hours categorized by type of service rendered, with totals.

Use:

Use this report to summarize a provider’s activities for payer or regulatory agencies.

Access:

This report is available to users with the applicable report permissions, via the Santrax® Agency Management system to organizations providing services.

Parameters

Use the following fields to limit the report output to:

Field	Description
Companies	The selected company(s)
Payor	The selected payor
Admit Type	The selected admission type
Locations	The selected location(s)
Date From/To	Schedules which occurred during the entered/selected date range.

Report Output

Each column of the report displays the:

Columns	Description
Service	The type of service provided
Rate	The hourly rate being billed for this service
Hours	Number of hours accumulated for each service



Statistical Report Mapping Santrax Agency Management

Sample Report

Statistical Contract Form Summary		
Company <> From 10/04/2016 To 10/04/2017 11:59 PM		
Service	Rate \$	Hours
HHA	\$2.50	1.00
	\$2.55	6.00
	\$4.93	5.00
	\$5.00	1,515.00
	\$5.33	158.50
	\$5.34	204.50
	\$7.00	1.00
	\$10.00	261.33
	\$13.00	1.50
	\$15.00	52.50
	\$20.00	65.00
	\$25.00	5.00
	\$35.00	6.00
	\$40.00	4.00
\$50.00	35.50	
Total:	N/A	2,321.83
Nursing	\$7.50	13.00
Total:	N/A	13.00
PCA	\$3.00	22.50
	\$4.00	4.75
	\$5.00	0.50
	\$8.00	10.00
	\$9.00	1.00
Total:	N/A	38.75
Waiver	\$3.50	23.00
	\$14.00	17.00
Total:	N/A	40.00
Other	\$0.01	3.00
	\$3.00	3.25
	\$4.87	14,044.00
	\$4.94	107.25
	\$5.00	1,820.00
	\$5.20	6,251.00
	\$5.33	164.00
	\$5.34	281.00
\$11.00	1.00	
Total:	N/A	22,674.50
TOTAL		25,088.08

Figure 1: Statistical Contract Form Summary



Statistical Report Mapping

Santrax Agency Management

Statistical Patient Summary Report

Description:

This report allows providers to view summary information about their case load and client traffic – where they came from; where they were discharged to and how long they were with the provider for a selected date range.

Use:

Use this report to summarize a provider’s activities for payer or regulatory agencies.

Access:

This report is available to users with the applicable report permissions, via the Santrax® Agency Management system to organizations providing services.

Parameters

Use the following fields to limit the report output to:

Field	Description
Company	The selected company(s)
Date From/To	Schedules which occurred during the entered/selected date range.
Locations	The selected location(s)

Report Output

Each column of the report displays the:

Columns	Description
Census	Number of active patients on the date(s) defined in the report
Total Cases	Number of admissions handled (some clients may account for more than one case)
Unduplicated Patient Count	Number of unique clients with an admission.
Length of Stay	Length of time clients received services.
Admission Source	Where clients came from prior to provider’s care
Discharge by Type	Where clients were discharged to after leaving provider’s care

Sample Report

Statistical Patient Summary Report	
Company <> [REDACTED], Date From 10/04/2016 Date To 10/04/2017	
Census	787
Total Cases	2,199
Unduplicated Patient Count	2,022
Length Of Stay	
1-30 Days	998
31-60 Days	175
61-90 Days	74
91-180 Days	57
181-365 Days	32
366+	78
Total	1,414
Admission Source	
Hospitals	1
Physicians	0
Self/Family/Friends	1
Nursing Homes	0
Other Institutions	0
CHHA's	1
LTHHCP's	0
LHCSA's	1
CASA/ Social Services	1
MLTC/MCO	0
Birth Affidavits	0
Elementary/Pre K	1
Local Health Departments	0
Other	0
Total	6
Discharge By Type	
Hospitals	2
Death	2
Self/Family/Friend	2
Nursing Homes	2
Other Institutions	2
CHHA's	0
LTHHCP's	2
LHCSA's	7
CASA/Social Services	0
MLTC/MCOs	0
Other	0
Total	19

Figure 2: Statistical Patient Summary Report



Statistical Report Mapping

Santrax Agency Management

Client Search Report (Updated)

Description:

This report allows providers to patients start and end of care and referral information.

Use:

Use this detail report to summarize a provider's length of stay.

*Notes: *This report can be viewed in the Excel (Data Only) format, and can be filtered to remove SOC Start of Care dates after the end of the period being reviewed and EOC End of Care dates before the period being reviewed to include all active patients during the necessary time period.*

Access:

This report is available to users with the applicable report permissions, via the Santrax® Agency Management system to organizations providing services.

Parameters

Use the following fields to limit the report output to:

Field	Description
Company	The selected company(s)
Locations	The selected location(s)
Admit Type	The selected admission type
Team	The group assigned to the patient.
Client Status	The selected client status. (Leave blank)
Referral Source	The source of referral on the patient's profile.

Report Output

Each column of the report displays the:

Columns	Description
Client Name	Number of active patients on the date(s) defined in the report
Chart ID	The patient's chart ID.
As of	The date the patient's status was edited
ROC	The Referral of Care date.
SOC	The Start of Care date.
EOC	The End of Care date.
Other ID	The ID entered in the patient's Other ID field.
Referrer	The source of referral on the patient's profile.



Statistical Report Mapping

Santrax Agency Management

Sample Report

Client_Search_Reporting [Compatibility Mode] - Excel Lisa Pares

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do Share

O20

	A	B	C	D	E	F	G	H	I	J
1	Client Search									
2	Name	Chart ID	Status	As Of	ROC	SOC	EOC	Other ID	Referrer	
3	Aaronson, Aron	QU1234567890-CON	04	09/12/18	08/30/18	09/03/18	09/12/18		MetroPlus	
4	Doe, John	NA9999999999-CON	04	06/20/14	04/29/14	04/30/14	06/20/14		Winthrop University Hosp	
5	Jackson, Jill	QU9999999998-CON	04	07/04/12	06/25/12	06/25/12	07/04/12		United Health Care	

Sheet1

Ready Display Settings 100%

Statistical Revenue Summary Report

Description:

This report allows agencies to view the numbers of hours, the amount of net revenue generated by the different types of services they perform, with totals. Billable hours and net revenue are grouped by payer type and service for the selected date range.

Use:

Use this report to summarize a provider’s activities for payer or regulatory agencies.

Access:

This report is available to users with the applicable report permissions, via the Santrax® Agency Management system to organizations providing services.



Note:

In order for the Statistical Revenue Summary Report to display hours and revenue by service for a single payer, filter the report by that payer.

Parameters

Use the following fields to limit the report output to:

Field	Description
Companies	The selected company(s)
Date From:/To	Schedules which occurred during the entered/selected date range.
Locations	The selected location(s)
Payor	The selected payor
Admit Type	The selected admission type

Report Output

Each column of the report displays the:

Columns	Description
Service	Type of service provided
Hours	Number of hours accumulated for each service
Net Revenue \$	Revenue accumulated for the selected service

Sample Report

Statistical Revenue Summary Report		
Companies = [REDACTED] From 10/04/2016 To 10/04/2017 11:59 PM		
Revenue Source: Contract		
Service	Hours	Net Revenue \$
HHA	442.58	\$4,879.30
Nursing	13.00	\$97.50
PCA	38.75	\$178.00
Waiver	40.00	\$94.50
Other	7.25	\$20.78
Total	541.58	\$5,270.08
Other - Specify: CRN, HSK, PCW		
Revenue Source: Direct		
Service	Hours	Net Revenue \$
HHA	5.00	\$250.00
Nursing	3.75	\$37.50
PCA	0.00	\$0.00
Waiver	0.00	\$0.00
Other	16.75	\$15.38
Total	25.50	\$302.88
Other - Specify: CRN, HSK, PCW		
Grand Totals		
Hours	567.08	
Net Revenue \$	\$5,572.96	

Figure 3: Statistical Revenue Summary Report



Statistical Report Mapping

Santrax Agency Management

Statistical Services Provided by County Report

Description:

This report displays a demographic categorization of clients by county, age, gender, number of hours, type of visits and contract over a specific date range.

Use:

Use this report to summarize a provider's activities for payer or regulatory agencies.

Access:

This report is available to users with the applicable report permissions, via the Santrax Agency Management system to organizations providing services.

Parameters

Use the following fields to limit the report output to:

Field	Description
Company	The selected company(s)
Locations	The selected location(s)
Date From	Enter the beginning date of the date range
Date To	Enter the ending date of the date range

Report Output

Each column of the report displays the:

Columns	Description
Cases	Number of clients handled, categorized by county, source, gender and age
Hours and Units	Number of hours and units billed, categorized by county, source, gender and age
Live-In Visits	Number of visits in which the caregiver stayed overnight, categorized by client age
Other Visits	Number of schedules that recorded visits rather than hours that recorded visits rather than hours, categorized by client age



Statistical Report Mapping

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Sample Report

Statistical Services Provided Summary Report											
Company <-> [REDACTED] Location = [REDACTED], Date From 10/04/2016 Date To 10/04/2017											
Service	Cases				Hours + Units (In Hours)				Live In Visits	Other Visits	
	Total	Female	Male	Unk	Total	Female	Male	Unk			
Cherokee											
Contract											
HHA											
< 21	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
21-64	1	0	0	1	54.49	0.00	0.00	54.49	0	0	
65+	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
Unk	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
Contract Totals											
< 21	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
21-64	1	0	0	1	54.49	0.00	0.00	54.49	0	0	
65+	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
Unk	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
Cherokee Totals											
< 21	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
21-64	1	0	0	1	54.49	0.00	0.00	54.49	0	0	
65+	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
Unk	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
Los Angeles											
Contract											
CLP											
< 21	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
21-64	1	0	0	1	3.00	0.00	0.00	3.00	1	0	
65+	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
Unk	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
CRN											
< 21	0	0	0	0	0.00	0.00	0.00	0.00	0	0	
21-64	1	1	0	0	6.00	6.00	0.00	0.00	0	1	
65+	0	0	0	0	0.00	0.00	0.00	0.00	0	0	

Figure 4: Statistical Services Provided by County Report

Authorization Schedule Variance (Updated)

Description:

This report displays difference between what was scheduled vs. what was used for authorizations.

- If the variance for the Proposed (scheduled) hours/units or the actual (billed) hours/units are a negative number, this indicates the number of hours that were under-utilized in the authorization.
- If this number is positive this means either that there is no authorization limit (see Auth Limit By), or the hours/units are about the authorized amount.

Use:

Use this report to summarize the following information for regulatory agencies:

- The total client's that had authorized hours/units which were not completed/under-utilized.
- The number of cases for a range of authorized hours per week.

Notes:



- Authorizations with a limit of '**None**' will not give valid totals for hours/units that were not completed/underutilized.
- The authorizations format '**Unit**' typically represent 15-minute increments. To determine the number of hours for that line divide totals for the authorized, proposed and actual times by 4.

Access:

Parameters

Use the following fields to limit the report output to:

Field	Description
Companies	The selected company(s)
Date From/To	Schedules which occurred during the entered/selected date range.
Locations	The selected location(s)
Payor	The selected payor
Admit Type	The selected admission type
Coordinator	The selected coordinator
Auth Limit By	The selected authorization limit type (weekly, daily, none)
Event Status	The selected event status

Report Output

Each column of the report displays the:

Columns	Description
Client Name	The client's name
Client ID	The client's Chart ID
Client Customer #	The client's Medicaid ID
Auth Ref #	The Authorization number
Auth From/To	The Date range for that authorization.
Service	Type of service provided
Auth Format(H/U/V)	Authorization format H-Hourly, U-Unit, V-Visit.
Auth Limit By*	Authorization limit type (D-Daily, W-Weekly, M-Monthly, None)
Auth Available**	The number of hours/units allowed by the authorization's limitation for the specified date range. If the authorization date range extends past the report date range it will break down the hours/units to the equivalent date range. For example, if a week report date range was selected but the authorization date range is a month, the report will calculate the number of hours/units that would have been the maximum limitation amount for the report week date range selected.
Proposed Schedule	Proposed schedule time during the specified date range applied to that authorization.
Proposed Variance	The difference between the schedule time and the authorization available. A negative number represents time under the authorization limit, while a positive number represents time over the authorized limit or authorizations with no limit.
Actual Schedule	The billed time during the specified date range applied to that authorization.
Actual Variance	The difference between the billed time and the authorization available. **A negative number represents time under the authorization limit, while a positive number represents time over the authorized limit or authorizations with no limit.



Statistical Report Mapping

Santrax Agency Management

Sample Report

Authorization Schedule Variance Report														
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Authorization	Event Status = 04- Closed, Date From 01/01/2017 Date To 01/31/2017												
2	Client Name	Client ID	Client Customer #	Auth Ref #	Auth From	Auth To	Service Shared	Auth Format (H/U/V)	Auth Limit By*	Auth Available**	Proposed Schedule	Proposed Variance	Actual Schedule	Actual Variance
3	Aaron, Aaron	NY99999-MC	BC1230545	00099999	01/27/2017	03/06/2017	PCA	Units	D	864.00	856.00	-8.00	851.00	-13.00
4	Doe, Jane	BX12345-MCO	AA00055566	00123456	01/01/2017	01/31/2017	PCA	Hours	None	0.00	87.00	87.00	87.00	87.00
5	Hill, Jack	NY00001-MC	XY987654321	4567890123	01/01/2017	01/31/2017	SN	Visit	None	0.00	1.00	1.00	1.00	1.00
6	Hill, Jack	NY00001-MC	XY987654321	00009998	10/06/2016	03/31/2017	PCA	Hours	D	186.00	126.00	-60.00	126.00	-60.00
7	Hill, Jane	NA88888-MCO	AW4444333	00000123	09/06/2016	03/04/2017	PCA	Units	W	80.00	86.00	6.00	86.00	6.00
8	Smith, John	NY01234-MCO	PA122333	00004567	12/29/2016	01/27/2017	PCA	Hours	W	248.00	247.00	-1.00	247.00	-1.00
9	*Auth Available column does not consider the auth maximum when calculating for auths with a limit by other than 'None'.													
10	** Auth Available is derived from the auth limit and the number of days in the report range; it does not account for available auths outside the report range. For best results set report range to match the auth limit.													
11	Page -1 of 1													

Live-In Totals

Live-in totals can be found through either your payroll system or the Santrax Agency Management the Payroll Review report. Please see the handout below for this information:

Santrax Agency Management NY Library: **“Suggested Reports for DOH FLSA Survey Updated 8/18/2016”**

http://webtraining.sandata.com/ny_sam/?download=lsZXMtbnV3L3NpdGVzLzE4LzlwMTgvMDQvMjAxNI8wOF8xOF9TdWdnZXNOZWQtRE9lLVN1cnZleS1SZXBvcnRzLVNhbncRyYXgtQWdlbnN5LU1hbmFnZW1lbnQtLnBkZgZm