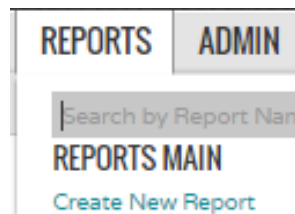


Claim Status Reporting

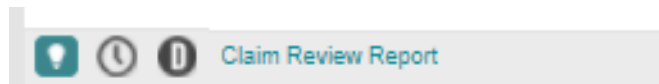
ServiceBench gives you the ability to run a report that shows the status of your claims for a selected period of time. Below are step-by-step instructions that show how to run a Claims Status report as well as how to schedule so the report will run automatically.

Create a Report Template:

1. Hover over Reports on the Main Menu, this will open the Mega Menu where you will click on "Create New Report"



2. From the list of available reports select "Claim Review Report"



3. Once you click on the report name, it will take you to the criteria page. If you plan to set up multiple reports, update the Report Name field to reflect the time period of the report. Below is a report set up for the previous week. Next, enter the email address you wish to have the report sent to.

Report Name *	Claim Review Report - Previous Week
Delivery Method	No Notification ▼
Email Report To	rdumortier@cchs.com

4. Enter the claim statuses that you wish to see in the report. CCHS recommends that you select the following statuses: Approved, Escalated, Paid, Rejected, Saved, Transferred, and Under Review.

Claim Status

- Approved
- Closed
- Corrected
- Duplicate
- Escalated
- Historical
- Incomplete
- New
- Paid
- Part Verify



To select multiple statuses, hold down the <Ctrl> key and click on each selection.

- Next, enter the Claim Date Submitted selection. CCHS recommends setting up the report for 3 different Claim Date Submitted selections; each one will be its own separate report. Those are Previous Week, Current Month and Previous Month.

Claim Date Submitted

Entered Date Range

Claim Date Rejected

From Claim Number

From Reference Number

Import File Name

Region

Past 7 Days

Past 30 Days

Past 60 Days

Past 90 Days

Past 180 Days

- In the Report Fields section, you will select the information you desire to see in your report. To select a desired field from the left hand side, highlight it by clicking on it, then click the right arrow to move it to the selected side. Once you have all your desired fields selected, you can arrange them in the order that you desire by selecting that field and clicking the Down or Up buttons to the right.

REPORT FIELDS

Report Fields

None

Service Administrator Name (GroupBy 1)

SP Account Number (GroupBy 2)

Reference Number

Authorization Number

Service Agreement Number

Store Code

Selected

Service Provider

Claim Number

Claim Date Submitted

Claim Status

Total Amount Requested

Total Amount Approved

DOWN UP

- Next, click in the Exclude Report Header box. This will remove the selection criteria information from appearing on the top of the report and save valuable space.

☐ Exclude Report Header

- Click on the **CREATE TEMPLATE** Icon on the bottom of the page to create the report template. These templates can be updated later if needed.

9. To schedule the report to run automatically, click on the **SCHEDULE REPORT** icon. Enter the time of day you wish the report to run in the upper right and select the timeframe you wish the report to run (for example 12/8/2017 to 12/8/2027) by clicking on the calendar icons next to each field.

SCHEDULE CRITERIA

Description * Claim Review Report - Previous Week Run Time [HHMM] *

Run Report From* To

☒ Daily
Every 1 day(s)
☐ Every Weekday

☐ Weekly
Every week(s) on
☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

☐ Monthly
Every month(s) on
Day
The Select... Select...

Select the frequency that you want the report to run. CCHS recommends Monday mornings for Weekly and Current Month reports and the 1st of the month for Previous Month reports.

10. Click **SCHEDULE** to complete the scheduling process. ServiceBench will then take you to the Scheduled Reports page and show you the report name, run start date, run end date, run time, next run date and reoccurrence.
11. To set up and schedule additional reports, follow steps 1 through 10 in the above process.

Update an Existing Report Template:

1. If you want to make changes to an existing template, follow steps 1 and 2 in the Create Template section above.
2. Click on the report template that you wish to edit.



3. This will take you to the Report Criteria page and allow you to update your criteria using steps 4 through 7 listed above.
4. Click the **UPDATE TEMPLATE** icon to save your changes.