

ART Gallery Report 0347

Billing Summary by Provider

1. INTRODUCTION

Tired of the endless paper involved in keeping track of your billable services? Use the 0347 Billing Summary by Provider report to streamline your billing process and examine billable services by project, service type, client, and case worker.

This report is intended for case managers, project managers, and executive directors, to see billable services and bill out accordingly.

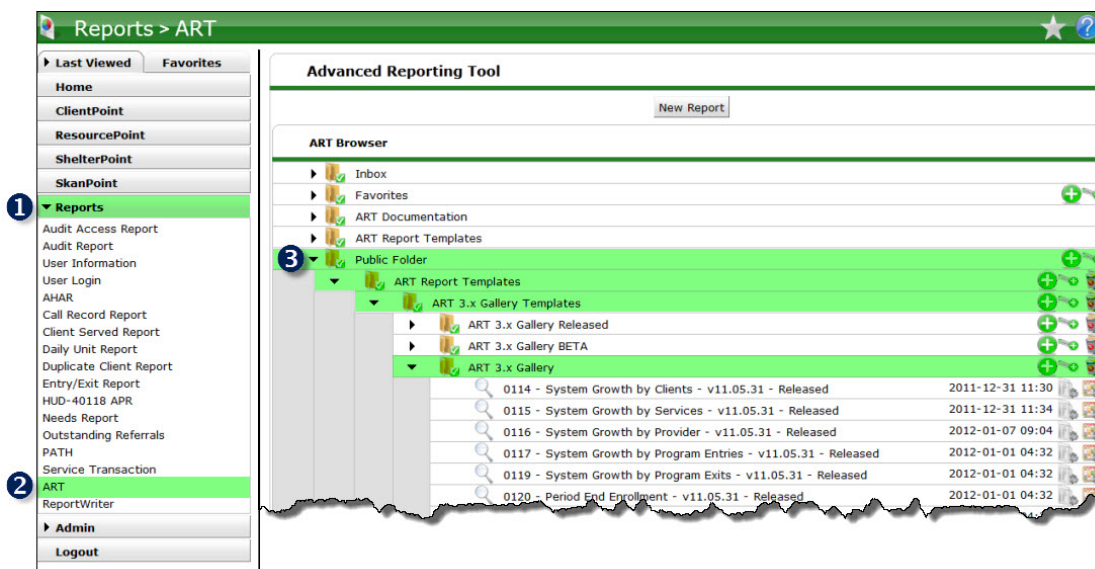
The report can be run whenever a new billing summary is desired.

This report requires ServicePoint 5.x and ART 3.x.

2. REPORT INSTRUCTIONS AND PROMPTS:

The easiest way to start using this report is to navigate to the automapper. This is a folder that has the reports automatically mapped to your site, so that you don't have to map them yourself. You can navigate to the automapper as shown below:

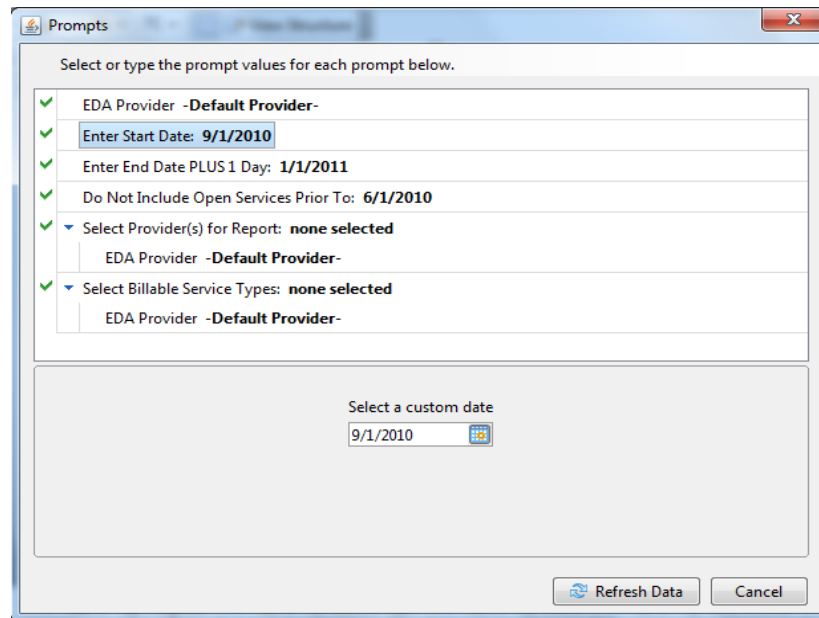
Figure 2.1: Location of Automapped Reports



Requests for additional information concerning the report function/design should be directed to Bowman Systems' Customer Support Specialist (CSS) staff.

How to run: Upon opening the report, the user will be prompted (see Figure 2) to specify parameters which control the data returned by the report. Once the user has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a selection has been made. The user should then single-click the “Refresh Data” button to generate the report.

Figure 2.2: Report Prompts



The screenshot shows a window titled "Prompts" with a close button in the top right corner. The main area contains a list of prompts, each with a green checkmark to its left. The prompts are: "EDA Provider -Default Provider-", "Enter Start Date: 9/1/2010", "Enter End Date PLUS 1 Day: 1/1/2011", "Do Not Include Open Services Prior To: 6/1/2010", "Select Provider(s) for Report: none selected", "EDA Provider -Default Provider-", "Select Billable Service Types: none selected", and "EDA Provider -Default Provider-". Below the list is a section titled "Select a custom date" with a text box containing "9/1/2010" and a calendar icon. At the bottom right, there are two buttons: "Refresh Data" and "Cancel".

The user prompts contained in this report are:

1. **EDA Provider:** The user should select the EDA provider to run the report as, or leave it at the default "-Default Provider-" if EDA mode is not desired.
2. **Enter Start Date:** The user should type in, or select from the calendar, the first day of the reporting period.
3. **Enter End Date PLUS 1 DAY:** The user should type in, or select from the calendar, the day immediately following the last day of the reporting period. For example, if the reporting period is July 1 2009 - September 30 2010, then October 1 2010 should be entered/selected.
4. **Do Not Include Open Services Prior to:** The user should type in, or select from the calendar, the date for which open or services without an end date prior to that date will be excluded from the report.
5. **Select Provider(s) for Report:** Click the “refresh list” icon and wait for the left window to refresh. Now select the providers to include, by highlighting them in the left window and moving them into the right window using the right selection arrow.
6. **Select Billable Service Types:** Click the “refresh list” icon and wait for the left window to refresh. Now select services by highlighting them in the left window and moving them into the right window using the right selection arrow.

3.2 TAB SPECIFIC INFORMATION:

Tab A – By Project

Figure A

Billing Summary				
Billable Units by Project				
Reporting Period: 1/1/2014 - 7/3/2014				
Bowman Systems, LLC(0)				
Unit Type	Number of Units	Unit Cost	Cost of Service	Count of Services
Bags	5	2.00	10.00	1
Sessions	6	10.00	60.00	2
Missing Unit Type	0	0	0	2
Total Number of Units:	11	Total Service Cost:	\$70.00	5
Vruxmf Yreyye - Xmmdigepf Yrgjvq Gsgrowm(MJR)(5020)				
Unit Type	Number of Units	Unit Cost	Cost of Service	Count of Services
Sessions	282	0	0	102
Tickets/Tokens/Rides	53	0	0	12
Vouchers	12	0	0	12
Missing Unit Type	0	0	0	3
Total Number of Units:	347	Total Service Cost:	0	129
Wex Ejywxugp Qlza py Mdhcbk - Axsdprno Tlsecrazng(8179)				
Unit Type	Number of Units	Unit Cost	Cost of Service	Count of Services

Tab A summarizes the data by project for the selected date range. The information in the table is sorted by Unit Type.

- Data in this tab is limited to the Primary Recipient (see Tech Notes) to avoid inflated counts.
- Data is displayed in terms of Number of Units, Unit Cost, Cost of Service and Count of Services.
- If the Unit Type is missing then “Missing Unit Type” appears in the row with the same display as described above.
- Each project is sectioned off and a Total Number of Units and Total Service Cost are provided at the bottom of each section.

Tab B – By Service Type

Figure B

Billing Summary						
Billable Units by Service Type						
Reporting Period: 1/1/2014 - 7/3/2014						
Bowman Systems, LLC(0)						
Start Date	End Date	Unit Type	Number of Units	Unit Cost	Cost of Service	Count of Services
Education						
6/3/2014	6/3/2014	Missing Unit Type	0	0	0	1
7/2/2014	7/2/2014	Missing Unit Type	0	0	0	1
7/2/2014	7/2/2014	Bags	5	2.00	10.00	1
Total Number of Units:			5	Total Service Cost:	\$10.00	3
Life Skills Education						
7/2/2014	7/2/2014	Sessions	5	10.00	50.00	1
7/3/2014	7/3/2014	Sessions	1	10.00	10.00	1
Total Number of Units:			6	Total Service Cost:	\$60.00	2
Vruxmf Yreyye - Xmmdige pf Yrgjvq Gsgrowm(MJR)(5020)						
Start Date	End Date	Unit Type	Number of Units	Unit Cost	Cost of Service	Count of Services
Bus Fare						
1/9/2014	1/14/2014	Tickets/Tokens/Rides	4	0	0	1

Tab B contains the same information as Tab A and is sorted first by Provider and then by Service Code Type.

- Data in this tab is limited to the Primary Recipient (see Tech Notes) to avoid inflated counts.
- Data is displayed in terms of Service Start and End Dates, Unit Type, Number of Units, Unit Cost, Cost of Service and Count of services per Service Type.
- If the Unit Type is missing then “Missing Unit Type” appears in the row with the same display as described above.
- Each project is sectioned off and a Total Number of Units and Total Service Cost are provided at the bottom of each section.

Tab C – By Client

Figure C

Billing Summary						
Billable Units by Client						
Reporting Period: 1/1/2014 - 7/3/2014						
Bowman Systems, LLC(0)						
Start Date	End Date	Unit Type	Number of Units	Unit Cost	Cost of Service	
Biffkhln, Taqueta W (36962)						
Education						
6/3/2014	6/3/2014	Missing Unit Type	0	0	0	
Total Number of Units:			0	Total Service Cost:	0	
Cxgrd, Anthony (215046)						
Life Skills Education						
7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
Total Number of Units:			5	Total Service Cost:	50.00	
Eotfj, Anthony O (363138)						
Life Skills Education						
7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
7/3/2014	7/3/2014	Sessions	1	10.00	10.00	
Total Number of Units:			6	Total Service Cost:	60.00	

Tab B contains the same information as Tabs A and B and is sorted first by Provider, then by Client and finally by Service Code Type.

- Data in this tab is displayed for the Primary Recipient (see Tech Notes) and for other household members included in the service.
- Data is displayed in terms of Service Start and End Dates, Unit Type, Number of Units, Unit Cost, Cost of Service and Count of services per Service Type.
- If the Unit Type is missing then “Missing Unit Type” appears in the row with the same display as described above.
- Each project is sectioned off and a Total Number of Units and Total Service Cost are provided at the bottom of each section.

Tab D – Detail

Figure D

Billing Summary												
Billable Units Detail												
Reporting Period: 1/1/2014 - 7/3/2014												
Provider	Group Id	Clients Served in Group	Client Id	Client Name	Service Description	Start Date	End Date	Unit Type	Number of Units	Unit Cost	Cost of Service	Primary
Bowman Systems, LLC(0)	4670059	5	30902	Biffkhin, Taqueta W	Education	6/3/2014	6/3/2014	Missing Unit Type	0	0	0	P
		5	30903	Fekrhog, John Q	Education	6/3/2014	6/3/2014	Missing Unit Type	0	0	0	
		5	72823	QhYkgxf, Christina	Education	6/3/2014	6/3/2014	Missing Unit Type	0	0	0	
		5	123783	RtGxzim, Christally X	Education	6/3/2014	6/3/2014	Missing Unit Type	0	0	0	
		5	123784	Luvhgogb, Christopher P	Education	6/3/2014	6/3/2014	Missing Unit Type	0	0	0	
	4670066	8	210486	Vcnlrz, Latisha X	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
		8	210489	Xkhmru, Ashley D	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
		8	210490	Yqgyvq, Ashton T	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
		8	210491	Wqnos, Azia R	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
		8	215046	Cxgrd, Anthony	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
		8	383138	Eotfj, Anthony O	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	P
		8	427921	Yfwix, Antonio D.	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	
		8	539846	Xango, Amber T.	Life Skills Education	7/2/2014	7/2/2014	Sessions	5	10.00	50.00	

Tab D is a detail tab that provides information about each client served in the date range selected:

- **Provider** – this column lists the name of the service provider.
- **Group Id** – this column lists the Group Id.
- **Clients Served in Group** – this column displays the number of clients served in the group.
- **Client Id** – this column displays the Client Id for each client served.
- **Client Name** – this column displays each client’s name.
- **Service Description** – this column displays the service code description for each service.
- **Start Date** – this column displays the start date for each service.
- **End Date** – this column displays the end date for each service.
- **Unit Type** – this column displays the unit type for each service.
- **Number of Units** – this column displays the number of units for each service.
- **Unit Cost** – this column displays the unit cost for each service.
- **Cost of Service** – this column displays the cost of each service.
- **Primary** – this column displays a “P” for the Primary Recipient of each group service.

Tab E –Additional Information

Figure E

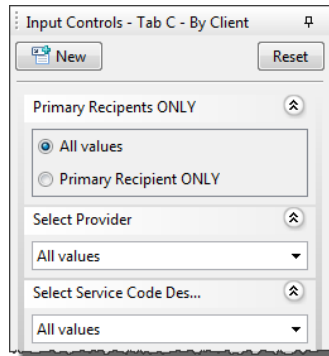
Billing Summary Additional Information Reporting Period: 1/1/2014 - 7/3/2014			
User Prompt Field:		Value Selected:	
EDA Provider	-Default Provider-		
Enter Start Date:	1/1/14		
Enter End Date PLUS 1 Day:	7/4/14		
Do Not Include Open Service Prior To:	1/1/11		
Select Provider(s) for Report:	none selected; Bowman Systems, LLC(0); Vruxmf Yreyye - Xmmdigepf Yrgjvq Gsgrowm(MJR)(5020); Wex Ejqywxugp Qlza py Mdhcbk - Axsdprno Tlsecrazng(8179)		
Select Billable Service Types:	none selected; Case/Care Management; Rent Payment Assistance; Utility Assistance; Life Skills Education; Parenting Education; Clothing; Bus Fare; Clothing Vouchers; Employment Preparation; Education; Household Goods; Mortgage Payment Assistance		
Providers Reporting Information in this Report:		Service Types	Total Service Count
Bowman Systems, LLC(0)		2	19
Vruxmf Yreyye - Xmmdigepf Yrgjvq Gsgrowm(MJR)(5020)		5	332
			77

Tab E is provided as a reference to the user running the report and lists the parameters specified in the user prompts, as well as counts by provider:

- “Service Types” represents the number of service types during the reporting period.
- “Total Service Count” represents the total number of services during the reporting period.
- “Unique Client Count” is the Client Count de-duplicated using the Client Unique Id algorithm.

4. INPUT CONTROLS

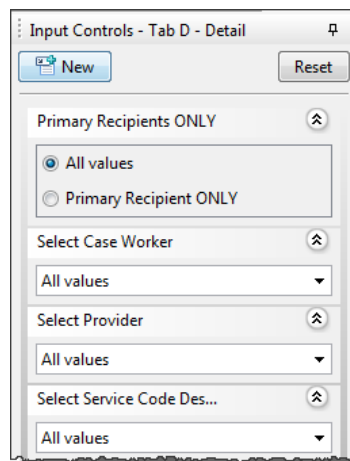
4.1 Tab C – By Client



Tab C contains several Input controls to help the user filter the data as desired:

- **Primary Recipients Only** – this input control allows the user to filter the data by the Primary Recipient Only (see Tech Notes for more details)
- **Select Provider** – this input control allows the user to filter the data to a particular provider
- **Select Service Code Description** – this input control allows the user to filter the data to a particular service code.

4.2 Tab D – Detail



Tab D contains several Input controls to help the user filter the data as desired:

- **Primary Recipients Only** – this input control allows the user to filter the data by the Primary Recipient Only (see Tech Notes for more details)
- **Select Case Worker** – This input control allows the user to filter to a particular case worker (as assigned in ServicePoint on the Case Managers Tab)
- **Select Provider** – this input control allows the user to filter the data to a particular provider
- **Select Service Code Description** – this input control allows the user to filter the data to a particular service code.

5. ALERTERS

Tab C – By Client, Tab D – Detail

There are several alerters on these tabs to assist with data quality.

- Primary Recipient – the Primary Recipient (see Tech Notes for more details) is highlighted in bold black font. Other clients in the same group are highlighted in grey font.
- Missing Unit Type – null values for Service Unit type will display as “Missing Unit Type”
- Null values for Number of Units, Unit Cost and Cost of Service – null values for these fields will display as “0”

6. DIMENSIONS USED:

Tab-Specific Information

Tab A – By Project

Dimension Used: Service Provide Provider, Service Units, Service Non-Dollar Amount, Service Cost Per Unit

Tab B – By Service Type

Dimension Used: Service Provide Provider, Service Code Description, Service Provide Start Date, Service Provide End Date, Service Units, Service Non-Dollar Amount, Service Cost Per Unit

Tab C – By Client

Dimension Used: Service Provide Provider, Client Last Name, Client First Name, Client Middle Name, Service Code Description, Service Provide Start Date, Service Provide End Date, Service Units, Service Non-Dollar Amount, Service Cost Per Unit

Tab D – Detail

Dimension Used: Svs Start, Svs End, Svs Unit Type, Svs Unit Number, Service Uid, Group Id, Svs Unit Amt, Svs Desc, Svs Name, Svs Provider, Svs Case Worker

Tab E – Additional Information

Dimension Used: Service Provide Provider, Service Code Description, Service Uid, Client Unique Id

7. TECHNICAL INFORMATION

7.1 Primary Recipient

Primary Recipient is derived in one of several ways:

- a. Clients served as singles will be counted as Primary Recipient.
 - I. Service is created with only a single individual and no other clients are included
 - II. Service is created with more than one client but other client(s) are deleted from the service leaving only one client or other members exited service (modified group count of 1)
- b. Clients served with more than one client in a group:
 - I. Client where service units, unit type, service number of units or service unit cost where not null is the Primary Recipient.
 - II. Otherwise, if all of the above fields are null then the Primary Recipient is the client with the lowest Service Id number in the group.

7.2 Cost Calculations

The report will calculate the “Cost of Service” column by multiplying the number of units by the cost per unit. If the Number of Units or the Unit Cost is a 0 value then the “Cost of Service” column will also show a 0 value.

7.3 Naming Conventions

There are some naming differences between ServicePoint and ART:

- a. Case Worker in ART refers to the Case Managers section available in *ServicePoint* when viewing a client record.
- b. Service Cost Per Unit in ART refers to the Cost per Unit field available in *ServicePoint*.

7.4 Inclusion

In order for a case manager to be properly included in this report, the requirements listed below must be met.

- a. The provider selected for the case manager must be in the same list of providers that are selected for the provider prompt of the report.
- b. The Service Provide Start Date is on or after the date started for the Case Manager.
- c. The Service Provide Start Date is on or before the date ended for the Case Manager or the Case Manager date ended is null.

7.3. Modification Options

There are no recommended modifications to this report.

8. MAPPING OBJECTS:

A listing of the report objects and their source universe and source folder is provided below. Objects are arranged by query and by object type.

QUERY NAME	OBJECT TYPE	FIELD NAME	LOCATION
BISData: _u (Client Universe)	Result Objects	Client Uid	Clients folder
		Client Unique Id	Clients folder
		Client First Name	Clients / Client Unique Id folder
		Client Last Name	Clients / Client Unique Id folder
		Client Middle Name	Clients / Client Unique Id folder
		Service Uid	Clients / Services (Outer) folder
		Service Code	Clients / Services (Outer) folder
		Service Code Description	Clients / Services (Outer) folder
		Service Provide Start Date	Clients / Services (Outer) folder
		Service Provide End Date	Clients / Services (Outer) folder
		Service Provide Provider	Clients / Services (Outer) folder
		Service Units	Clients / Services (Outer) folder
		Service Non-Dollar Amount	Clients / Services (Outer) folder
		Service Cost Per Unit	Clients / Services (Outer) folder
		Service Group Units	Clients / Services (Outer) / Service Group (Outer) / Service Group Fund (Outer) / Service Group funding Source (Outer) folder
		Service Group Non-Dollar Amount	Clients / Services (Outer) / Service Group (Outer) / Service Group Fund (Outer) / Service Group funding Source (Outer) folder
	Service Group Cost per Unit	Clients / Services (Outer) / Service Group (Outer) / Service Group Fund (Outer) / Service Group funding Source (Outer) folder	
	Service Group Id	Clients / Services (Outer) folder	
	Filter Objects	Service Provide Provider	Clients / Services (Outer) folder
		Service Provide Start Date	Clients / Services (Outer) folder
Service Provide End Date		Clients / Services (Outer) folder	
Service Code Description		Clients / Services (Outer) folder	
Service Inactive		Clients / Services (Outer) folder	
Case Worker Universe: _u (Client Universe)	Result Objects	Client Uid	Clients folder
		Client Unique Id	Clients folder
		Case Worker Uid	Clients / Case Workers folder
		Case Worker Name	Clients / Case Workers folder
	Filter Objects	Service Uid	Clients / Services (Outer) folder
		Case Worker Inactive	Clients / Case Workers folder
		Case Worker Date Started	Clients / Case Workers folder
		Case Worker Date Ended	Clients / Case Workers folder
		Case Worker Provider	Clients / Case Workers folder
		Service Provide Start Date	Clients / Services (Outer) folder

9. REVISION HISTORY:

Version	Description of Changes
V1	Original version –BETA
V2	Revision: Updated service counts for 5.8x and higher; formatting changes to improve layout; removed Case Worker tab and replaced with Client Detail; addition of input controls, including one for Case Worker.
V3	Revision: Corrected Input Control error; removed references to ServicePoint setting that is no longer valid.