

ONTRAC[®] Baseline Reports

A guide to using the ONTRAC reports

For Software Version 11.3

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ONTRAC Reports

Reports are essential to understanding, evaluating, and communicating how well your organization is performing. The following reports sections describe the general ONTRAC and specific component reports. A listing of all reports and the components where they are used is in [Appendix A](#).

For each report, there is a sample page, description, report details, and parameters. There may also be sections about specific terminology, usage tips, and criteria. Actual data fields and calculations are included only for the summary reports. Data in the report samples comes exclusively from test databases and any resemblance to actual data is strictly coincidental. You can use the parameters to configure the reports, such as when unit goals change or if you want to limit the report to a specific department or type of patient. Required parameters are marked with a red asterisk (*).

ONTRAC Purge

Summary and summary detail level reports are populated with information that is captured in snapshots at specific points in time. Summary information such as account listings and summary totals are stored in the system to allow users to review reports from past summary periods. Over time, the amount of snapshot data stored in the system can increase report generation and snapshot duration times. Baseline ONTRAC snapshot purge logic does not purge detailed or aggregate snapshot information or data. Huron Healthcare recommends purging snapshot information at 365 days and works with the client to implement purge when necessary to improve performance. For long-term historical review, save each week's reports to a shared drive that can be accessed past the purge time frames.

Live account information is purged from the system according to a detailed purge plan that deletes accounts no longer requiring active follow-up, generally six months past discharge and 31 days past the last follow-up date. However this plan may be adjusted depending on client circumstances.

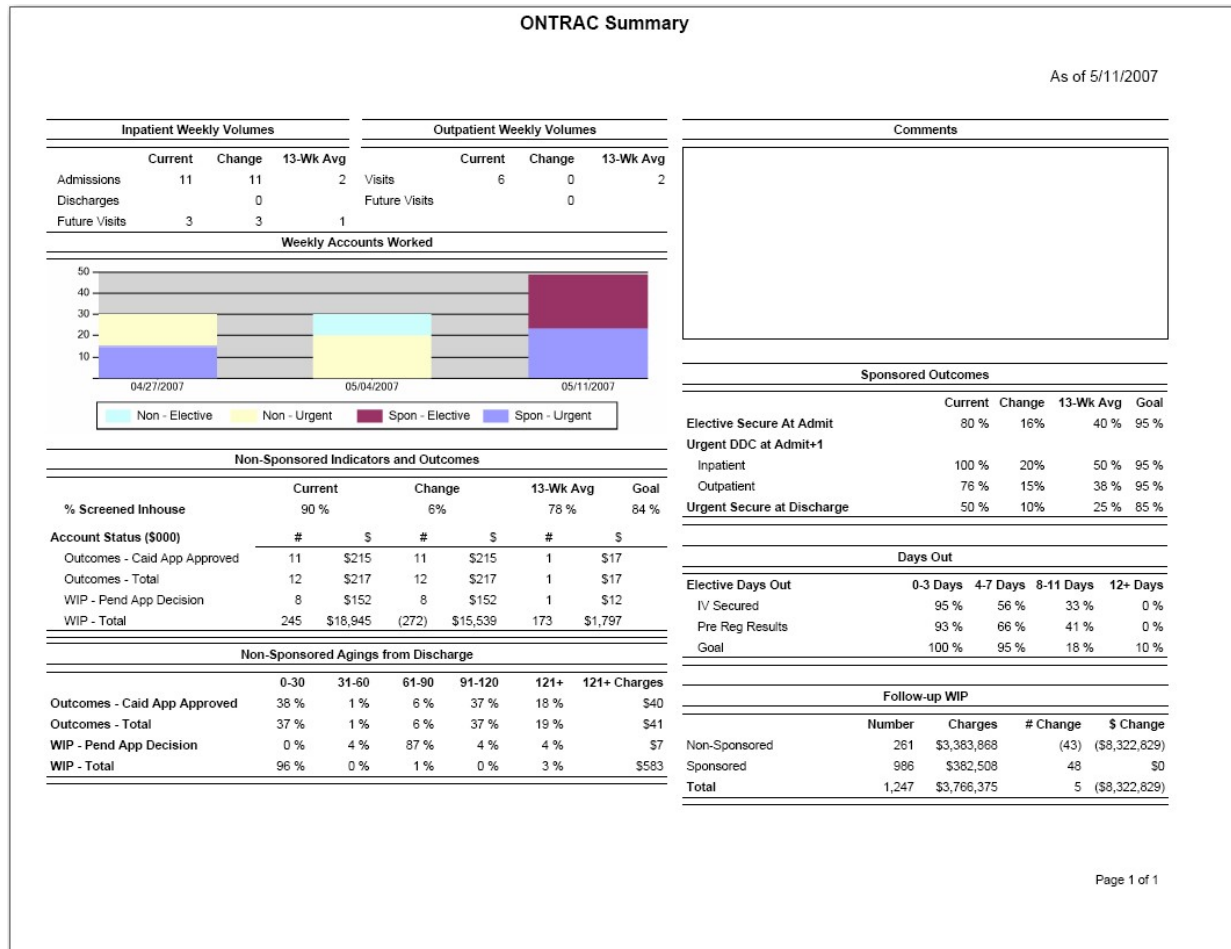
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General Reports

The baseline ONTRAC reports listed in this section are the same for both Financial Counseling and Insurance Verification.

ONTRAC Summary



Description

The ONTRAC Summary report provides an overview of several reports in one. You can drill down to more detail by clicking in each area of this report. The ONTRAC Summary report is printed on a weekly basis and reviewed in meetings with the client. It consists of the following sections:

- ☐ Inpatient Weekly Volumes
- ☐ Outpatient Weekly Volumes
- ☐ Weekly Accounts Worked Graph
- ☐ Comments
- ☐ Non-Sponsored Indicators and Outcomes
- ☐ Sponsored Outcomes
- ☐ Non-Sponsored Agings from Discharge

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- ☐ Days Out
- ☐ Follow-up WIP

Terminology

Sponsored: Account has a payer assigned to it.

Follow-up WIP: Accounts that are past the scheduled follow-up date at the end of day Friday and that still require follow-up.

Reporting Period: The period of time for which data is displayed on the report.

Report Details

The following information is displayed on the ONTRAC Summary Report:

Inpatient Weekly Volumes

| Column | Description |
|---------------|--|
| Admissions | Accounts that have been admitted in the current reporting period and the change from the prior reporting period. Also includes a 13-week average of IV and FC accounts. |
| Discharges | Accounts that have been discharged in the current reporting period and the change from the prior reporting period. Also includes a 13-week average of IV and FC accounts. |
| Future Visits | Accounts that had services after the end of the reporting period and the change from the prior reporting period. Only counts 30 days forward. Also includes a 13-week average of IV and FC accounts. |

Outpatient Weekly Volumes

| Column | Description |
|---------------|---|
| Visits | Accounts that have been discharged in the current reporting period and the change from the prior reporting period. Also includes a 13-week average of IV and FC accounts. |
| Future Visits | Accounts that had services after the reporting period and the change from the prior reporting period. Also includes a 13-week average of IV and FC accounts. |

Comments

Comments that you enter to describe your organization's performance for the week. They are used to explain significant events that contributed to the results. Comments may highlight successes, goal achievements, and areas of concern.

Weekly Accounts Worked (Graph)

The graph displays the number of sponsored elective and urgent accounts and non-sponsored, urgent and elective accounts by week.

Non-Sponsored Indicators and Outcomes

| Column | Description |
|------------------------|--|
| Current | Current week |
| Change | Change from the preceding week |
| 13-Week | 13-Week average |
| Goal | Weekly goal amount |
| Indicators | |
| % Screened In-house | Total accounts in FC module that were discharged during the reporting period and had a Discharge Screening code in 1 (Not Required), 7 (Completed Pre-Admit), or 8 (Completed In-house) divided by total accounts in the FC module that were discharged during the reporting period. |
| Account Status (\$000) | |

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| Column | Description |
|------------------------------|--|
| Outcomes – Caid App Approved | This week's accounts from the Medicaid application approved outcome lines of the FC Summary report |
| Outcomes - Total | This week's accounts from total outcomes line of the FC Summary report |
| WIP – Pend App Decision | Accounts from "Pending App Decision" under WIP by Accountability on the FC Summary report - #, \$ |
| Total WIP | Accounts from Total WIP line of FC Summary - #, \$ |

Sponsored Outcomes

| Column | Description |
|---|---|
| Current | Current week |
| Change | Change from the preceding week |
| 13-Week Avg | 13-Week average |
| Goal | Weekly goal amount |
| Elective Secure at Admit | Number of elective IV accounts admitted as of the end of the day during the reporting week divided by all IV accounts admitted during the reporting week. NOVA deleted accounts and accounts transferred to FC are excluded. |
| Urgent DDC at Admit +1 Inpatient and Outpatient | Number of urgent accounts with due diligence complete one day after admission. |
| Urgent Secure at Discharge | Number of discharged urgent secure IV accounts during the reporting period divided by the total number of all urgent IV accounts that were discharged during the reporting period. NOVA deleted accounts and accounts transferred to FC are excluded. |

Non-Sponsored Agings from Discharge

| Column | Description |
|------------------------------|---|
| Outcomes - Caid App Approved | Percent of dollars for outcomes by age strata for Medicaid application approval |
| Outcomes - Total | Percent of dollars for all outcomes for a specified discharge age tier and the ratio of all outcomes for a specified discharge age tier to Total Outcomes for all discharge age tiers |
| WIP – Pend App Decision | Percent of dollars for WIP that is pending an approval for a specified discharge age tier |
| WIP Total | Percent of total dollars for WIP for a specified discharge age tier and the ratio of the all WIP for a specified discharge tier to all WIP regardless of discharge age |

Days Out

| Column | Description |
|-------------------|--|
| Elective Days Out | Day ranges |
| IV Secured | Percentage of elective IV accounts that are secured and not transferred to FC for each future date range |
| Pre-Reg Results | Percentage of Pre-Reg accounts that are complete for each future date range. |
| Goal | Goal percentage entered for each days out period |

Follow-up WIP

| Column | Description |
|---------------|---|
| Non-Sponsored | The number and charges for non-sponsored follow-up WIP. Reflects the number of accounts on FC worklists at the end of day Friday. Also includes the amount of change from the preceding week. |
| Sponsored | The number and charges for sponsored follow-up WIP. Reflects the number of accounts on IV worklists at the end of day Friday that have discharged, are in-house, or are expected up to 7 |

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| Column | Description |
|--------|---|
| | days in the future. Also includes the amount of change from the preceding week. |
| Total | The total number and charges for follow-up WIP. Also includes the amount of change from the preceding week. |

Parameters

| Parameter | Description |
|------------------------|---|
| Report Date (Equal To) | Date for which to display information on report. If left blank, the ONTRAC software will default to the previous Friday. |
| Worklist (In List) | Enter the worklist code for which you want to run the report (if multiple, separate by commas). Leave blank to include all. |
| Facility (Equal To) | Enter the facility code for the facility that you want to report. Leave blank to show all facilities. |

Related Reports

Related reports include the IV Days Out Detail, FC Summary, FC Summary Detail, IV Summary, IV Summary Detail, and ONTRAC Summary Trends reports.

Report Distribution

Generally this report is distributed to executives, managers, and supervisors.

Reporting Period

The reporting period is one week, beginning on Saturday and ending on Friday.

Report Data Source

Most information comes from snapshot data from the ONTRAC database that is updated with data from the HIS. Comments and goals are manually entered.

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ONTRAC® Baseline Reports

ONTRAC Summary Trends

| ONTRAC Summary Trends | | | | | | | | | |
|----------------------------------|------------------------|-------------|-------------|-------------|--------------|-------------|-------------|-------------|------|
| Week Ending: 07/27/2007 | | | | | | | | | Goal |
| | Baseline 06/19/2005 | 06/15/2007 | 06/22/2007 | 06/29/2007 | 07/06/2007 | 07/13/2007 | 07/20/2007 | 07/27/2007 | |
| Inpatient Weekly Volumes | | | | | | | | | |
| Admissions | 357 | 450 | 410 | 422 | 297 | 345 | 401 | 431 | |
| Future Visits | 197 | 197 | 185 | 178 | 173 | 201 | 193 | 189 | |
| Outpatient Weekly Volumes | | | | | | | | | |
| Visits | 537 | 481 | 581 | 587 | 497 | 511 | 631 | 590 | |
| Accounts Worked | | | | | | | | | |
| Non Sponsored - Elective | 66 | 87 | 78 | 63 | 72 | 57 | 58 | 61 | |
| Non Sponsored - Urgent | 32 | 29 | 39 | 45 | 42 | 28 | 37 | 33 | |
| Sponsored - Elective | 100 | 130 | 97 | 72 | 87 | 99 | 93 | 103 | |
| Sponsored - Urgent | 167 | 113 | 152 | 148 | 137 | 141 | 139 | 157 | |
| Follow-Up WIP | | | | | | | | | |
| Non-Sponsored | 129 | 153 | 90 | 171 | 304 | 260 | 260 | 256 | |
| | \$3,013,197 | \$4,914,569 | \$3,176,910 | \$3,500,829 | \$11,706,696 | \$3,383,868 | \$1,618,920 | \$1,393,929 | |
| Sponsored | 300 | 0 | 0 | 0 | 938 | 615 | 613 | 623 | |
| | \$987,495 | \$0 | \$0 | \$0 | \$382,508 | \$382,508 | \$743,525 | \$1,711,297 | |
| Total | 429 | 0 | 0 | 0 | 1242 | 875 | 873 | 879 | |
| | \$4,000,692 | \$4,914,569 | \$3,176,910 | \$3,500,829 | \$12,089,204 | \$3,766,375 | \$2,362,445 | \$3,105,226 | |
| Sponsored Outcomes | | | | | | | | | |
| Elective Secure At Admit | 72% | 91% | 92% | 93% | 94% | 93% | 95% | 95% | 95% |
| Inpatient | 72% | 91% | 92% | 93% | 94% | 93% | 95% | 95% | 95% |
| Outpatient | 72% | 91% | 92% | 93% | 94% | 93% | 95% | 95% | 95% |
| Urgent Secure at Discharge | 72% | 91% | 92% | 93% | 94% | 93% | 95% | 95% | 95% |
| Elective Days Out DDC | | | | | | | | | |
| IV Secured | | | | | | | | | 0% |
| 0 - 3 Days | 0% | 0% | 0% | 93% | 91% | 93% | 0% | 0% | 100% |
| 4 - 7 Days | 53% | 93% | 93% | 81% | 94% | 93% | 95% | 95% | 95% |
| 8 - 11 Days | 8% | 13% | 12% | 13% | 13% | 14% | 15% | 15% | 17% |

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ONTRAC® Baseline Reports

| ONTRAC Summary Trends | | | | | | | | | |
|--|------------------------|------------|------------|------------|------------|------------|--------------|--------------|------|
| Week Ending: 07/27/2007 | | | | | | | | | |
| | Baseline 06/19/2005 | 06/15/2007 | 06/22/2007 | 06/29/2007 | 07/06/2007 | 07/13/2007 | 07/20/2007 | 07/27/2007 | Goal |
| Elective Days Out DDC | | | | | | | | | |
| 12+ Days | 1 % | 5 % | 5 % | 6 % | 7 % | 6 % | 7 % | 8 % | 10 % |
| Pre Reg Days Out | | | | | | | | | |
| 0 - 3 Days | 81 % | 97 % | 98 % | 98 % | 97 % | 98 % | 98 % | 98 % | 98 % |
| 4 - 7 Days | 53 % | 93 % | 93 % | 81 % | 94 % | 93 % | 95 % | 95 % | 95 % |
| 8 - 11 Days | 8 % | 13 % | 12 % | 13 % | 13 % | 14 % | 15 % | 15 % | 17 % |
| 12+ Days | 1 % | 5 % | 5 % | 6 % | 7 % | 6 % | 7 % | 8 % | 10 % |
| Non-Sponsored Indicators and Outcomes | | | | | | | | | |
| % Screened Inhouse | 72 % | 87 % | 87 % | 86 % | 87 % | 88 % | 88 % | 89 % | 90 % |
| Account Status (#) | | | | | | | | | |
| Outcomes - Approval # | 0 | 0 | 0 | 0 | 0 | 0 | 111 | 121 | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$215,276 | \$345,211 | |
| Total Outcomes # | 0 | 0 | 0 | 0 | 0 | 0 | 312 | 401 | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$116,980 | \$1,541,947 | |
| WIP - FC/Patient # | 0 | 0 | 0 | 0 | 0 | 0 | 218 | 252 | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$152,137 | \$1,763,739 | |
| Total WIP # | 129 | 0 | 0 | 0 | 0 | 0 | 254 | 252 | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$18,945,396 | \$13,941,022 | |
| Non-Sponsored Aging from Discharge | | | | | | | | | |
| 121+ | | | | | | | | | |
| Outcomes - Approval % | 0 % | 0 % | 0 % | 0 % | 0 % | 0 % | 6 % | 5 % | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$39,711 | \$6,050 | |
| Total Outcomes % | 0 % | 0 % | 0 % | 0 % | 0 % | 0 % | 5 % | 6 % | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$41,416 | \$97,516 | |

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| ONTRAC Summary Trends | | | | | | | | | |
|---|------------------------|------------|------------|------------|------------|------------|------------|------------|------|
| Week Ending: 07/27/2007 | | | | | | | | | |
| | Baseline 06/19/2005 | 06/15/2007 | 06/22/2007 | 06/29/2007 | 07/06/2007 | 07/13/2007 | 07/20/2007 | 07/27/2007 | Goal |
| Non-Sponsored Aging from Discharge | | | | | | | | | |
| 121+ | | | | | | | | | |
| WIP - FC/Patient % | 0 % | 0 % | 0 % | 0 % | 0 % | 0 % | 1 % | 3 % | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$6,668 | \$218,453 | |
| Total WIP % | 0 % | 0 % | 0 % | 0 % | 0 % | 0 % | 6 % | 16 % | |
| \$ | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$582,762 | \$730,563 | |

Description

The report displays weekly inpatient and outpatient volumes trended over seven weeks. Use this report to analyze weekly inpatient and outpatient volumes. Percentages for sponsored outcomes are displayed based on secure status and patient type. Non-Sponsored indicators and outcomes are trended by number and dollar amount as well as WIP. Use the report to identify positive or negative changes and to identify opportunity areas for future weeks' focus.

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Report Details

The ONTRAC Summary Trends report has the following information for each entry:

| Column | Description |
|---------------------------------------|--|
| Inpatient Weekly Volumes | |
| Admissions | Number of inpatients admitted by week |
| Discharges | Number of inpatients discharged by week |
| Future Visits | Number of inpatients expected by week |
| Outpatient Weekly Volumes | |
| Visits | Number of outpatient visits by week |
| Future Visits | Number of outpatients expected by week |
| Accounts Worked | |
| Non Sponsored - Urgent | Number of non-sponsored urgent accounts worked |
| Non Sponsored - Elective | Number of non-sponsored elective accounts worked |
| Sponsored - Urgent | Number of sponsored urgent accounts worked |
| Sponsored -Elective | Number of sponsored elective accounts worked |
| Follow-up WIP | |
| Non-Sponsored | Number of and dollar amount of non-sponsored accounts with follow-up WIP |
| Sponsored | Number of and dollar amount of sponsored accounts with follow-up WIP |
| Total | Total number of and dollar amount of accounts with follow-up WIP |
| Sponsored Outcomes | |
| Elective Secure at Admit | Percent of elective accounts that are secure at admit |
| Inpatient | Percent of elective accounts that are inpatient |
| Outpatient | Percent of elective accounts that are outpatient |
| Urgent Secure at Discharge | Percent of urgent accounts that are secure at discharge |
| Elective Days Out DDC | |
| IV Secured | |
| 0-3 Days | Percentage of IV Secured accounts that are 0-3 days out |
| 4 - 7 Days | Percentage of IV Secured accounts that are 4 -7 days out |
| 8 - 11 Days | Percentage of IV Secured accounts that are 8 -11 days out |
| 12+ Days | Percentage of IV Secured accounts that are 12 or more days out |
| Pre-Reg Results | |
| 0-3 Days | Percentage that are 0-3 days out |
| 4 - 7 Days | Percentage that are 4 -7 days out |
| 8 - 11 Days | Percentage that are 8 -11 days out |
| 12+ Days | Percentage that are 12 or more days out |
| Non-Sponsored Indicators and Outcomes | |
| % Screened In-house | Percentage of non-sponsored accounts that are screened in-house |

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| Column | Description |
|---|---|
| Outcomes - Approval | Number and dollar amount of non-sponsored accounts with an approval |
| Total Outcomes | Number and dollar amount of all outcomes for non-sponsored accounts |
| WIP - FC/Patient | Number and dollar amount of non-sponsored accounts with FC WIP |
| Total WIP | Number and dollar amount of all WIP for non-sponsored accounts |
| Non-Sponsored Aging from Discharge 121+ | |
| Outcomes - Approval | Percent of and dollar amount of non-sponsored aged accounts with an approval |
| Total Outcomes | Percent of and dollar amount of all outcomes for non-sponsored aged accounts |
| WIP FC/Patient | Percent of and dollar amount of WIP for F/C Patient non-sponsored aged accounts |
| Total WIP | Percent of and dollar amount of all WIP for non-sponsored aged accounts |

Parameters

| Parameter | Description |
|--------------------------|---|
| Facility (Equal To) | Enter the Facility code for which you want to run the report (if multiple, use the parent facility). Leave blank to include all. |
| Baseline Date (Equal To) | Select the date from the list to use as the baseline on the report. |
| Report Date (Equal To) | Select the date from the list for which to display information on report. If left blank, the ONTRAC software will default to the previous Friday. |

Related Reports

Related reports include ONTRAC Summary report.

Report Distribution

Generally this report is distributed to executives, managers, and supervisors.

Reporting Period

The reporting period is one week, beginning on Saturday and ending on Friday.

Report Data Source

Most information comes from snapshot data from the ONTRAC database that is updated with data from the HIS.

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ONTRAC Admitting

ONTRAC Admitting

| Account Number | Patient Name | Medical Record | Authorization | Verification | IV Delete |
|----------------|--------------|---------------------|---------------|--------------|-----------|
| | | Attending Physician | | | |
| | Visit Note | | | | |

Expected Date: MM/DD/2005

| | | | | | |
|-----------|----------------|--------------------------|--|--|--|
| ACT#11111 | LName1, FName1 | MR#111111 | | | |
| | | PhysLName1, PhysFName1 | | | |
| ACT#22222 | LName7, FName7 | MR#222222 | | | |
| | | PhysLName1, PhysFName1 | | | |
| ACT#33333 | LName6, FName6 | MR#333333 | | | |
| | | PhysLName23, PhysFName23 | | | |
| ACT#44444 | LName5, FName5 | MR#555555 | | | |
| | | PhysLName2, PhysFName2 | | | |
| ACT#77777 | LName3, FName3 | MR#444444 | | | |
| | | PhysLName1, PhysFName1 | | | |
| ACT#55555 | LName4, FName4 | MR#777777 | | | |
| | | PhysLName2, PhysFName2 | | | |
| ACT#66666 | LName2, FName2 | MR#666666 | | | |

Description

The ONTRAC Admitting report lists the patients expected to present for service. Use this report to review a complete listing of accounts with expected dates in the future. By default, this report is grouped by expected date and can be compared against the scheduling system reports to identify accounts added-on since the last download. Missing accounts should be brought to the attention of the staff to ensure proper diligence is performed and the account is created and secured prior to patient presenting for service. This report can also aid in scheduled patient chart reconciliation.

Criteria

This report uses all accounts in the ONTRAC database expected in the next seven days (or the number of days entered in the parameters). It also includes unmatched STAT Edits. The account population can be limited by authorization code, facility code, service code, number of days out, physician name, report date, and verification code.

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Terminology

Days Out: the number of consecutive days in which all accounts are due diligence complete or secure. To be considered one due diligence day out, 100% of scheduled accounts for the next day must be due diligence complete. To be considered one secure day out 100% of accounts for the next day must be secured (authorization obtained if required).

Report Details

The report table has the following information for each entry:

| Column | Description |
|---------------------|--|
| Account Number | |
| Patient Name | Last name, first name of patient |
| Visit Note | |
| Medical Record | Medical record number |
| Attending Physician | The physician with defined clinical privileges who has the primary responsibility for diagnosis and treatment of the patient |
| Authorization | Authorization code* |
| Verification | Verification code* |
| IV Delete | Delete code |
| Service Code | Indicates the department in the hospital where the patient will be seen or the type of service the patient will receive |

*For IV codes used, [See "Appendix B: ONTRAC Activity Codes".](#)

IV Delete Codes

| Code Type | Code | Code Description |
|-----------|------|-------------------|
| Delete | 1 | Out of Scope |
| | 2 | Canceled Account |
| | 3 | Supervisor Delete |

Parameters

| Parameter | Description |
|----------------------------------|--|
| Facility (Equal To) | Enter the Facility code for which you want to run the report (if multiple, use the parent facility). Leave blank to include all. |
| Auth Code (Equal To) | Used to limit the report to a specific authorization code; leave blank to include all authorization codes on the report |
| Hospital Service Code (Equal To) | Defines the area in the hospital where the patient was admitted or treated or the type of service the patient received; used to limit the report to a specific department or service |
| Number of Days Out (Equal To) | Used to include a specific number of days out. Default is seven days, leave blank to use the default number of days out. |
| Physician Last Name (Equal To) | Used to limit the report to a specific physician; leave blank to include all physicians on the report. |
| Report Date (Equal To) | Enter the date for which you want to run the report |
| Verif Code (Equal To) | Used to limit the report to a specific verification code; leave blank to include all verification codes on the report |

Revenue Cycle Solution
ONTRAC® Baseline Reports

Grouping and Sorting

- ☐ Expected Date—Baseline Grouping
- ☐ Patient Name—Baseline Sort, first
- ☐ Hospital Service Code—Baseline Sort, second

See the Grouping and Sorting tabs in the Report Properties for all available grouping and sorting options.

Related Reports

ONTRAC Unmatched STAT Edits

Report Distribution

Generally this report is distributed to managers and supervisors.

Reporting Period

The reporting period depends on what is entered in the parameters but is generally one week.

Report Data Source

Most information comes from snapshot data from the ONTRAC database that is updated with data from the HIS.