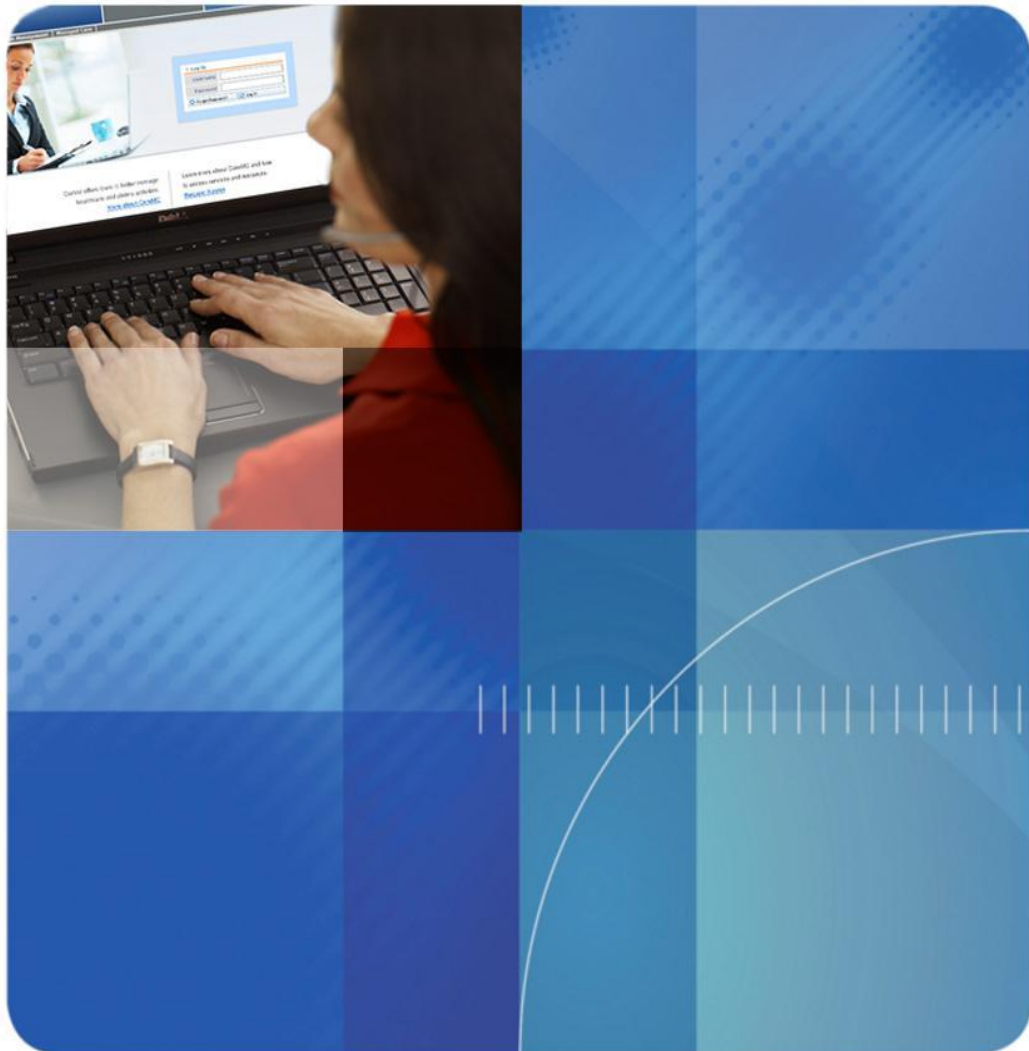


Liability Claim Receipt Report
Care^{mc} for Montgomery County
Self-Insurance Program
July 2012



Liability Claim Receipt Report

In order to locate general liability, automobile liability, and property damage claims in CareMC, please complete the following steps.

1. After logging into CareMC, you will see your personal Landing Page. Please select the Reports tile, or the Reports tab.



2. From the Reports tab, please select Claim Reports

REPORTS	TOOLS
Referral	
Medicare Report	
MSP Claim Search	
MSP CMS Response Report	
MSP Counts	
MSP Work Queue Report	
FNOL Lists	
(RT) Case Management	
(ME) Case Management	
(RT) Management	
(ME) Management	
(RT) Bonus	
(ME) Bonus	
(RT) Productivity	
(ME) Productivity	
EC Reports	
Claim Reports	
Claims Supervisor Dashboard	

- From Claim Reports, please select Claim Detail (the first report on the list)

	<u>Category</u>	<u>ReportName</u>
<u>Select</u>	Claim Reports	Claim Detail

- From the Parameters screen, the report will automatically populate the customer as Montgomery County Self-Insurance Program – EC. The Report as Of field should remain unchanged, but please select All Claims in the Claim Status field. You will not need to make any additional selections on the parameters screen.

▶ Claim Detail

Parameters
 Groups
 Filters
 Save Options
 Generate

Customer	Montgomery County Self-Insurance Program - EC
Report as Of	07/10/2012 mm/dd/yyyy
Claim Status	<input checked="" type="radio"/> All Claims <input type="radio"/> Open and Reopened <input type="radio"/> Reopened Only <input type="radio"/> Closed <input type="radio"/> Open
Location Level	<input type="radio"/> Level 1 <input checked="" type="radio"/> Level 2 <input type="radio"/> Level 3 <input type="radio"/> Level 4 <input type="radio"/> Level 5
Location Description	Filter <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Cancel"/> 9999 - MCSIP DEFAULT- 2 9999MCPS-1 - MCSIP CESC BUPO2 - MCSIP BETHESDA URBAN PARTNERSHIP- 2 COG02 - MCSIP CITY OF GAITHERSBURG- 2
Finance Detail Level	<input type="radio"/> Total <input type="radio"/> Level 1 <input checked="" type="radio"/> Level 2 <input type="radio"/> Level 3
Finance Category Description	Filter <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Cancel"/> ALE Allocated Expense BI Bodily Injury COL Collision EDC Expense-Defense & Cost Containment
Finance Amount Detail Level	<input checked="" type="radio"/> No Filter <input type="radio"/> Total Claim <input type="radio"/> Level 1 <input type="radio"/> Level 2 <input type="radio"/> Level 3
Finance Amount Category	No Filter
Finance Amount Type	No Filter
Finance Amount	<input type="radio"/> Equal <input type="radio"/> Not Equal <input type="radio"/> Less Than <input type="radio"/> Greater Than <input checked="" type="radio"/> None

- The user will note the below box on the right hand side of the screen. This simply shows all of the Parameters, and Filters the user has selected during the report build.



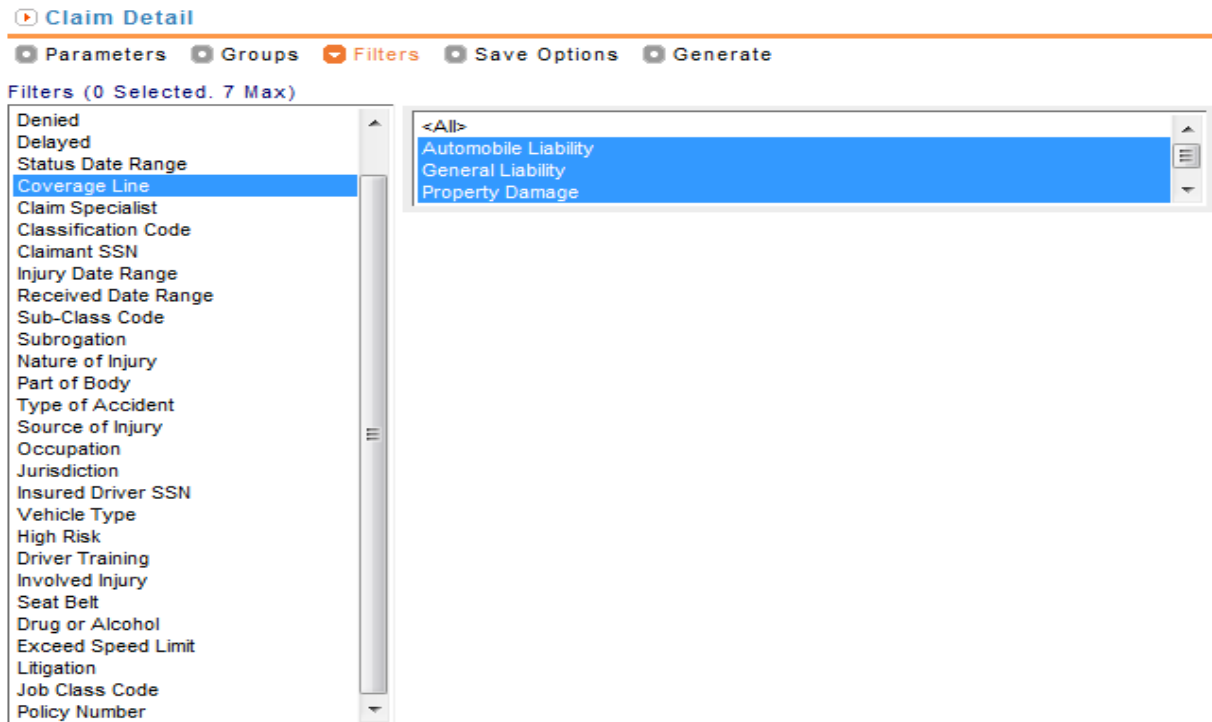
- From the Groups screen, select Coverage Line, and move the item over to the middle column. Please note that a Group is simply how the final report will subtotal your data. I.e., the report will subtotal the data by Coverage Line since the Coverage Line Group was selected.

Claim Detail

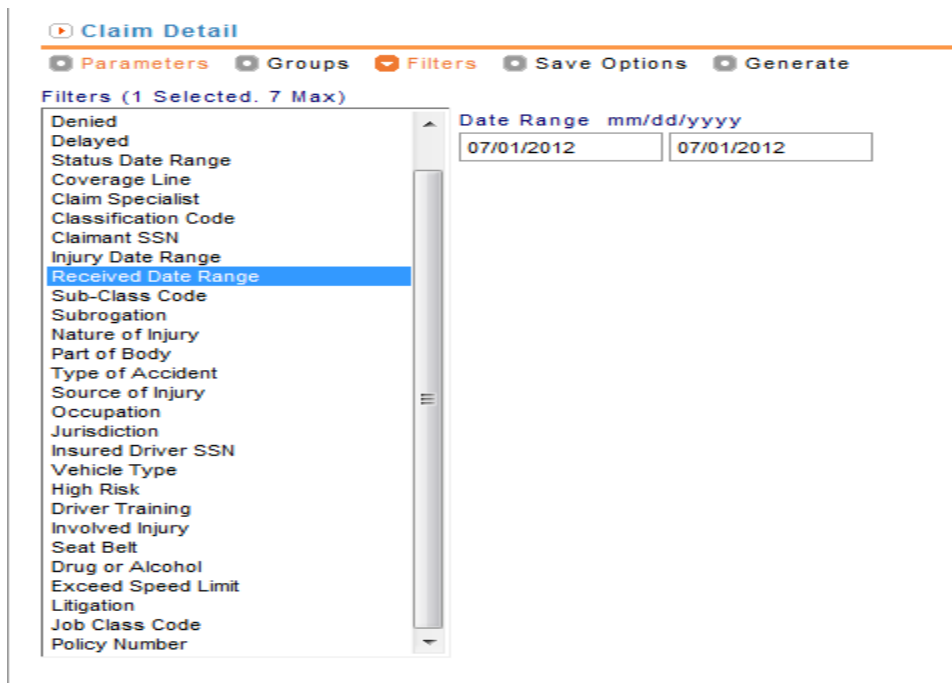
Parameters Groups Filters Save Options Generate

Available Groups	Page(3 Max.)	Detail(4 Max.)
Accounting Code Claimant Class Code Injury Year (FY) Jurisdiction Location Level 1 Location Level 2 Location Level 3 Location Level 4 Location Level 5 Purpose Code	Coverage Line	
Move Item	Move Item	Move Item

- From the Filters screen, please select Coverage Line. Select all of the the following by holding down the Ctrl button on your keyboard.



- Next, move to the Received Date Range Filter, and enter the dates you wish to review received claims.



- Click on Save Options, and title the report “Received Liability Claims” and click Save. This allows the user to access the report in the future without having to rebuild the parameters and groups. Please note that if the user wants to produce the report again with a different range of dates, that data will need to be changed under the Filters portion of the reporting module.

Claim Detail

Parameters Groups Filters **Save Options** Generate

Setting Description	Received Liability Claims
---------------------	---------------------------

- After clicking Save, the following screen will appear. This is simply showing the user that the report is now saved in My Reports, which is the users’ personal queue for all reports that have been built and saved by the user.

Claim Reports

Reports **My Reports** My Schedules Generated Reports(Complete: 12/Generating: 7)

		Report Name	Description	Last Saved Date	Last Status	Last Run Date	Scheduled
Select	Delete	Claim Detail	Received Liability Claims	7/10/2012 7:35:15 AM			No

11. Select the Received Liability Claims Report. This will take the user back to the Parameters screen, but bypass Parameters, Groups, Filters, and Save Options, and click the Generate tab. The Description field is optional, but it is recommended that the field be completed if the report will be emailed. The user has options to either view the report online, have it emailed, and choose what format the report should be generated in. Selections should be made based on the user's personal preference. Select Generate.

▶ Claim Detail

Parameters Groups Filters Save Options **Generate**

Description	Recieved Liability Claims
Report Handling	<input checked="" type="radio"/> View Online <input type="radio"/> Email
Email Address	Michelle_souchak@corvel.com
Zip	<input type="checkbox"/>
Format	<input checked="" type="radio"/> Pdf <input type="radio"/> Excel <input type="radio"/> CSV

Generate

12. Once Generate has been selected, the following will appear. Please note the Status column on the far right hand side which indicates that the reports is still generating. The user will not be able to access the report until it has finished generating.

▶ Claim Reports

Reports My Reports My Schedules **Generated Reports(Complete: 12/Generating: 8)**

		Report Name	Report Type	Description	Request Date	Viewed Date	Report Handling	Status
Detail		Claim Detail	PDF	Recieved Liability Claims	7/10/2012 7:45:05 AM		View Online	Generating

13. Once the report is complete, View and Delete options will appear. The user will then be able to view the report by clicking View. A pop up box will appear, and the report will open up in Adobe or excel (provided the user selected the view online version of the report).

▶ Claim Reports

Reports My Reports My Schedules **Generated Reports(Complete: 13/Generating: 7)**

			Report Name	Report Type	Description	Request Date	Viewed Date	Report Handling	Status
View	Detail	Delete	Claim Detail	PDF	Recieved Liability Claims	7/10/2012 7:45:05 AM		View Online	Complete

14. If the user selected the Email option, enter the applicable email address, and select the report format. The report will be delivered to the user's inbox after generation. The report will come from CorVel_AutoReporter@corvel.com, so please be sure to add the address to the user's safe senders list.

Claim Detail

Parameters Groups Filters Save Options **Generate**

Description	<input type="text"/>
Report Handling	<input type="radio"/> View Online <input checked="" type="radio"/> Email
Email Address	<input type="text" value="Michelle_souchak@corvel.com"/>
Zip	<input type="checkbox"/>
Format	<input type="radio"/> Pdf <input checked="" type="radio"/> Excel <input type="radio"/> CSV

Generate

15. In the .pdf version, please note that the first page of the report shows all of the Filters and Parameters the user selected, and the data begins on page 2.

CORVEL

1 of 2

Claim Detail

For all claims

For Finance Amount Detail Level : None

Claim status and finance amounts as of 07/10/2012

Finance Detail Level 2:

HIPAA WARNING - This report contains protected patient information

Report Filters

Filter One: Coverage Line

- AL Automobile Liability
- GL General Liability
- PROP Property Damage

Filter Two: Received Date Range

07/01/2012 - 07/01/2012

Groups

Page Groups: Coverage Line

Detail Groups:

16. In the excel version of the report, the filters and parameters are listed in the top rows of the report.

	A	B	C	D	E	F	G	H	I
1	Claim Detail								
2	For all claims as of 7/10/2012								
3	For Finance Amount Detail Level : None								
4	Claim status and finance amounts as of 07/10/2012								
5	Montgomery County Self-Insurance Program - EC								
6	Location Level 2: All Locations								
7	Finance Detail Level 2: All								
8	HIPAA WARNING - This report contains protected patient information.								
9	Groups: Coverage Line								
10	Filter 1: Coverage Line - AL, GL, PROP, Filter 2: Received Date Range - 07/01/2012 - 07/01/2012								
11	Prepared: 07/10/2012								

17. After the report has been generated and the user wishes to make changes to any Parameters, Filters, or Groups, simply return to the My Reports tab, click select, and make any changes needed. **This includes changing date filters to review claims received for a different period of time.** Since this report was saved, it will remain in My Reports until the user deletes the report.

▶ Claim Reports

Reports
 My Reports
 My Schedules
 Generated Reports(Complete: 15/Generating: 7)

		Report Name	Description	Last Saved Date	Last Status	Last Run Date	Scheduled
Select	Delete	Claim Detail	Received Liability Claims	7/10/2012 7:35:15 AM			No

18. If the user forgets to save the report, please note that all reports under Generated Reports will be available for 7 days from the date of generation, so the user can go back and access the report. If the report is not saved within that period of time, the report will be deleted and the user will have to re-create the report.

19. Once the user has generated the report, the user can then use the data within the report to look up particular claim information using the Claim Search tool. The Claim Search tool is a separate guide, and can be found on <http://www.mcsip.org/services/documents.html>.