Informatica

Informatica® Data Archive
6.4 HotFix 2

# Application Retirement for Healthcare Accelerator Reference

Informatica Data Archive Application Retirement for Healthcare Accelerator Reference
6.4 HotFix 2
April 2016

Publication Date: 2018-06-09

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# Preface

The *Informatica Application Retirement for Healthcare Accelerator Reference* is written for system administrators who are responsible for configuring and setting up the application retirement for healthcare accelerator. This guide is also written for users who run patient reports through the patient archive. This guide assumes you have knowledge of the healthcare applications you have retired, Data Vault, and Data Archive.

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CHAPTER 1

# Introduction to the Application Retirement for Healthcare Accelerator

This chapter includes the following topics:



## Introduction to the Application Retirement for Healthcare Accelerator Overview

After an organization retires a healthcare application to the Data Vault, they can use the Application Retirement for Healthcare accelerator to retain access to the application data. Data Archive users can run reports on the retired data through the Patient Archive in the Data Archive user interface. Users can also add a payment to a patient account through the Patient Archive.

The accelerator installs metadata for patient information reports that return information such as test results, allergies, physician notes, lab results, and pharmaceutical orders. Healthcare professionals can search by patient name and other criteria to view patient information reports.

The accelerator also installs metadata for claim reports and accounts receivable reports. A patient or an insurance provider might submit a payment after the patient account data has been retired to the Data Vault. In this case, employees who handle billing can add the payment to the patient account. After they add the payment to the patient account, they can run accurate accounts receivable reports through the Patient Archive.

## Materialized Views and View Definitions

Before a Data Archive user can run a patient archive report, a Data Archive administrator or Informatica implementation consultant must create materialized views in the Data Vault. When a Data Archive user runs a

patient archive report, the Data Visualization server queries the materialized views in the Data Vault to return the report information.

To create materialized views, map the retired application tables to the materialized view definitions in the Enterprise Data Manager. Then run the create materialized views standalone job to create the views in the Data Vault.

# Patient Archive

Data Archive users can run Patient Archive reports or add a payment to a patient account through the Patient Archives in the Data Archive user interface.

Data Archive users can access the Patient Archives through the Data Visualization menu in Data Archive. Users can run multiple patient information reports, in addition to claim reports and accounts receivable reports, in the Patient Archives. Users can also add a payment to a patient account with the payment functions within the Patient Archives.

# Application Retirement for Healthcare Accelerator Process

To use the Application Retirement for Healthcare accelerator, a Data Archive administrator must perform the following tasks:

1. Perform the prerequisite tasks for installation and install the accelerator. For more information about accelerator installation, see the *Informatica Data Archive Installation Guide*.
2. Retire the healthcare application. When you retire an application, you import metadata from the source database, create retirement entities, and create and run the retirement project. For more information about application retirement, see the *Retiring an Application to Data Vault With On-Premise Data Archive H2L*.
3. Review and if required, change the materialized view definitions that the accelerator installer imports into the Enterprise Data Manager.
4. To create the materialized views in the Data Vault, run the create materialized views standalone job in the Data Archive user interface.
5. Create a Patient Archives user. Alternatively, select an existing Data Archive user or users that you want to give Patient Archive access to.
6. Create a Data Vault access role for the Patient Archives.
7. Assign the access role to the entity or entities that contain the views used to create Patient Archive reports.
8. Assign the access role and the required system-defined roles to the Patient Archives user or users.
9. Assign the Accounts Receivable Burndown entity to the accounts receivable reports.

After an administrator has completed configuration, Data Archive users can access the Patient Archives to run reports or add a payment to a patient account.

CHAPTER 2

# Materialized Views and View Definitions

This chapter includes the following topics:



## Materialized Views and View Definitions Overview

The Data Visualization server queries materialized views in the Data Vault to return information for Patient Archive reports. Before a Data Archive user can run Patient Archive reports, you must create materialized views that map to the retired application tables in the Data Vault. If a user updates a patient account to add a payment through the Patient Archives, you must also refresh the materialized views to run accurate accounts receivable reports.

Materialized views are database objects in the Data Vault that contain the results of an SQL query. When a Data Archive user runs a Patient Archive report, the Data Visualization server queries the materialized view to return the report information. Because the Data Visualization server queries the materialized view and not the underlying table in the Data Vault, the server returns report information in real-time.

Materialized views are defined by SQL statements called view definitions. When you install the accelerator, the installer imports the view definitions into the Enterprise Data Manager where you can view and change the definitions. Each view definition corresponds to multiple application tables in the Data Vault.

Before a Data Archive user can run Patient Archive reports, you must review the view definitions in the Enterprise Data Manager. If required, change the view definitions to correspond to the retired tables in the Data Vault. After you have made any required changes to the view definitions, run the create materialized views standalone job in Data Archive. The create materialized views standalone job creates the materialized views in the Data Vault.

If a Data Archive user adds a payment to a patient account through the Patient Archives, you must refresh the materialized views before users can run accurate accounts receivable reports. To refresh the materialized views, run the refresh materialized views standalone job in Data Archive.

# Materialized Views and View Definitions Process

Before users access the Patient Archives, review the materialized view definitions in the Enterprise Data Manager. If required, change the view definitions to match the retired tables. To create the views in the Data Vault, run the create materialized views standalone job.

To create materialized views for patient archive reports, perform the following tasks:

1. In the Enterprise Data Manager, review the view definitions imported by the accelerator installer.
2. If required, change the view definitions to match the retired application tables in the Data Vault.
3. In the Data Archive user interface, run the create materialized views standalone job.
4. If a user adds a payment to a patient account, run the refresh materialized views job to refresh the views. If you do not refresh the materialized views, users cannot run accurate accounts receivable reports.

# Materialized View Definitions

The materialized view definitions map to the retired tables in the Data Vault. Before you create the materialized views, you might need to change the view definitions to match the tables.

The materialized views are defined by SQL statements called view definitions. The accelerator installer imports the predefined view definitions into the Enterprise Data Manager.

The view definitions are designed to map to common healthcare application tables. Each view definition joins multiple retired tables.

If the view definitions do not accurately map to the retired tables, the view might not be valid. Incorrectly mapped views might also cause inaccurate information to appear in the Patient Archive reports. To ensure that the views are valid, you might need to change the view definitions to map to the retired tables. For example, you might need to change the name of a table or a column in a view definition to match the retired table. You can also add or delete columns in a view definition. If you add or delete a column in a view definition, you must also modify the corresponding report with Informatica Data Visualization Designer. For more information on Data Visualization Designer, see the *Informatica Data Visualization Designer User Guide*. If you change any column alias names in the view definition, the view is no longer valid.

Changing or creating a view definition is a manual process that requires functional knowledge of the retired tables. If you are unsure whether or not you need to change view definitions, contact an Informatica implementation consultant.

# Materialized Views

The Data Visualization server queries materialized views in the Data Vault to return information for Patient Archive reports. To create the views, run the create materialized views standalone job.

Materialized views are database objects that contain the results of an SQL query. When a user runs a Patient Archive report, the Data Visualization server queries the materialized views and not the underlying tables.

The underlying SQL query in the report joins multiple materialized views. Because the Data Visualization server queries the views and not the tables in the Data Vault, the server can return report information in real-time.

Materialized views do not support Data Archive compliance features. You cannot apply legal hold, retention, data browse, or data purge functionality to materialized views.

# Create Materialized Views

To create the materialized views, review the view definitions in the Enterprise Data Manager. If required, change the views to map to the retired tables. Then run the create materialized views standalone job in Data Archive.

To run the job, you must know the Data Vault archive folder where you retired the application data. You must also know the name of the schema that you retired. If you retired multiple schemas, run the job for each schema.

For more information about running standalone jobs, see the *Informatica Data Archive User Guide*.

## Reviewing Materialized View Definitions

Review the materialized view definitions before you create the views.

1. In the Enterprise Data Manager, click **View** > **Constraints**.
2. Double-click the healthcare accelerator and expand the accelerator version.
3. To review each view definition, expand the virtual view schema and click on the individual views. You can review the view definition SQL text on the **General Information** tab. You can also review the columns included in the view on the **Columns** tab.

## Changing Materialized View Definitions

If required, change the views to map to the retired application tables.

1. In the Enterprise Data Manager, click **View** > **Constraints**.
2. Double-click the healthcare accelerator and expand the accelerator version.
3. In the virtual view schema, click the materialized view that you want to change.
4. In the **SQL Text** box, edit the SQL text that defines the view.
5. Click **File** > **Save**.

## Running the Create Materialized Views Standalone Job

To run the create materialized views standalone job, select the job from the standalone programs list. Then define the job parameters and schedule the job.

1. In the Data Archive user interface, click **Jobs** > **Schedule a Job**.
2. Select **Standalone Programs** and click **Add Item**.

   The **Select Definitions** window appears with a list of all available jobs.
3. Select the **Create Materialized Views** job and click **Select**.

4. Define the following job parameters:

| Parameter | Description |
|---|---|
| Destination Repository | The archive folder in the Data Vault where you retired the application data. Click the list of values button and select from the available folders. |
| Schema Name | Name of the retired schema. |

5. Schedule the job to run immediately or on a certain day and time.
6. Enter an email address to receive notification when the job completes, terminates, or returns an error.
7. Click **Schedule**.

# Refresh Materialized Views

To run accurate accounts receivable reports through the Patient Archives, refresh the materialized views after a Patient Archives user adds a payment to a patient account.

Users can add a payment to a patient account within the Patient Archives. Users might need to add a payment to a patient account if they receive a payment from a patient or an insurance provider after you have retired the healthcare application.

After a user adds a payment to a patient account, you must refresh the materialized views before users can see the updated balance on accounts receivable reports. To refresh the materialized views, run the refresh materialized views standalone job.

You can schedule the refresh materialized views job to run on a periodic schedule that you choose. If you schedule the job to run periodically, you do not have to manually run the job each time that a Data Archive user posts a payment. Do not schedule the job to run during business hours, because some reports might not be accessible while the job runs.

For more information about running standalone jobs, see the *Informatica Data Archive User Guide*.

## Running the Refresh Materialized Views Standalone Job

To run the refresh materialized views job, select the job from the standalone programs list. Then define the job parameters and schedule the job.

1. In the Data Archive user interface, click **Jobs** > **Schedule a Job**.
2. Select **Standalone Programs** and click **Add Item**.

   The **Select Definitions** window appears with a list of all available jobs.
3. Select the **Refresh Materialized Views** job and click **Select**.
4. Define the following job parameters:

| Parameter | Description |
|---|---|
| Destination Repository | Archive folder in the Data Vault where you retired the application data. Click the list of values button and select from the available folders. |

| Parameter | Description |
|---|---|
| Schema | Name of the retired schema. |
| Entity | Name of the entity that contains the view or views you want to refresh. By default, the entity that contains accounts receivable views is called Healthcare Refresh Materialized View AR Entity. This field is optional. |
| Refresh All Views | Determines whether to refresh all of the materialized views. If you do not know the entity or name of the view you need to refresh, click the list of values button and select **Yes**. If you select **No**, you must provide the entity or the name of the view you want to refresh. |
| View | Name of view you want to refresh. This view maps to accounts receivable tables in the retired application. Click the list of values button and select the view. This field is optional. |

5. Schedule the job to run immediately or on a certain day and time.
6. Enter an email address to receive notification when the job completes, terminates, or returns an error.
7. Click **Schedule**.

CHAPTER 3

# Accelerator Configuration

This chapter includes the following topics:



## Accelerator Configuration Overview

Before Data Archive users can access the Patient Archives to run reports or add a payment to a patient account, as a Data Archive Administrator you must complete the following configuration tasks:

- **Configure Patient Archive reports.** Before a Data Archive user/users can access the Patient Archives and run reports, you must assign them certain system-defined roles in addition to a Data Vault access role. You must also assign the access role to the entity or entities that contain the materialized views used to create the reports.
- **Configure Accounts Receivable Burndown.** The accelerator installs a pre-built Accounts Receivable Burndown entity in the Enterprise Data Manager. Before you can add multiple payments to patient accounts with the Accounts Receivable Burndown function, you must assign the entity to the accounts receivable reports. Assigning the entity to the reports allows users to run accounts receivable reports that reflect updated balances.

## Patient Archive Reports Configuration

Before a Data Archive user can access the Patient Archives, you must assign the required system-defined roles to the user. You can create a user or multiple users specifically to access the Patient Archives. Alternatively, you can assign the required system-defined roles to an existing Data Archive user. You must also create and assign a Data Vault access role to both the user and the required report entities.

For more information about users, system-defined roles, and access roles, see the *Informatica Data Archive Administrator Guide*.

## System-Defined Roles

To access the Patient Archives and perform different tasks, users must have at least two system-defined roles.

The Patient Archive reports are types of Data Visualization reports. To use Data Visualization reports, every user that accesses the Patient Archives must have one or both of the following system-defined roles for Data Visualization:

**Report Designer**

Allows the user to create, run, copy, and delete Patient Archive reports.

**Report Viewer**

Allows the user to run, print, and export Patient Archive reports.

In addition to a Data Visualization role, every user that accesses the Patient Archives must have the Healthcare Portal User role. Users that post payments to a patient account must have the Healthcare Account Admin role.

The following list describes the Healthcare Portal User and Healthcare Account Admin roles:

**Healthcare Account Admin**

Allows the user to add a payment to a patient account. Users with this role can add payments to a patient account through the Payments area, the Accounts Receivable Burndown area, and through Accounts Receivable reports. If a user without this role tries to add a payment to a patient account, the Update for AR Burndown job will fail.

**Healthcare Portal User**

Allows the user to access the Patient Archives. Users without this role cannot see the Patient Archives tab within the Data Visualization menu in the Data Archive user interface.

Data Archive updates role assignments according to the value of the user cache timeout parameter in the Data Archive system profile. The default value of this parameter is five minutes. If a role assignment has not updated after five minutes, review the user cache timeout parameter in the system profile. For more information about the Data Archive system profile, see the *Informatica Data Archive Administrator Guide*.

## Data Vault Access Roles

Create a Data Vault access role. Then assign it to both the Patient Archives user and the entity or entities that contain the views used to create the Patient Archive reports.

Data Vault access roles determine which Patient Archive reports that a user can view. After you create an access role, you assign the role to a user. You also assign the role to the entity or entities that contain the specific materialized views used in the reports that the user wants to run. Users can run or manage a report only if they have the same access role as the entity used to create the report.

The entities that contain the materialized views used to create Patient Archive reports are predefined and imported by the accelerator installer during installation. After you create the access role and assign it to a user, assign the role to one or more of the following entities in the Enterprise Data Manager:

**Healthcare_Account_Reports_Entity**

Contains the views required to run accounts receivable and claim reports.

**Healthcare_Patient_Reports_Entity**

Contains the views required to run patient information reports.

**Healthcare_All_Reports_Entity**

Contains the views required to run all Patient Archive reports, including accounts receivable, claim, and patient information reports.

# Accounts Receivable Burndown Configuration

Before you or another Data Archive user can add a payment to a patient account, you must configure the Accounts Receivable Burndown function.

To configure Accounts Receivable Burndown, assign the accounts receivable reports to the Accounts Receivable Burndown entity in the Enterprise Data Manager. Then, review how to format the CSV data file that you must create and upload during the AR Burndown job.

# Configuration Process

To configure the accelerator, perform the following tasks:

Configure Patient Archive reports.

1. Optionally, create a user to log in to the Patient Archives.
2. Create a Data Vault access role for the Patient Archives.
3. Assign the access role to the required reports entity or entities.
4. Assign the access role and required system-defined roles to the Patient Archives user.

Configure Accounts Receivable Burndown.

1. Assign the Accounts Receivable Burndown entity to the accounts receivable reports.
2. Review the guidelines for creating the CSV data file.

# Configure Patient Archive Reports

To configure Patient Archive reports, assign the required system-defined roles to a new Data Archive user or an existing Data Archive user. After you designate or create a Patient Archives user, create a Data Vault access role and assign the access role to both the user and the entity or entities used to create the Patient Archive reports. Then assign the required system-defined roles to the user.

## Step 1. Creating a Patient Archives User

When you create a user, you provide properties for contact and login information.

1. Click **Administration** > **Manage Users**.
2. Click **New User**.

   The **New User** page appears.

3. Enter the following user properties:

| Field | Description |
|---|---|
| Full Name | First and last name of user. Full name can consist of letters, spaces, apostrophes (‘), and dashes (-). |
| Email | The user receives notifications at this email address. |
| Department | Name of the department or organization of the user. This can consist of letters, spaces, apostrophes (‘), and dashes (-). |
| Login ID | Login ID for the user account. The login ID can include letters and numbers. |
| Password | Password for the user account. The password can include a maximum of 40 characters.<br>The password cannot contain the following characters:<br>! \| / = $ & @ " ' ` , |
| Valid from | Start date of the user account validity period. |
| Valid until | End date of the user account validity period. |
| Login is (Enabled / Disabled / Locked) | User account status. |
| Must change password at next login | If enabled, forces the user to choose a new password at the next login. |
| Password never expires | Overrides the global setting to prompt for password change after a specified period. |

4. Click **Save**.

## Step 2. Creating a Data Vault Access Role

When you create a Data Vault access role, you define the name, description, and a period of time that the role is valid.

1. Click **Administration** > **Manage Roles**.
2. Click **New Role**.
3. Enter the following Data Vault access role properties:

| Property | Description |
|---|---|
| Role Name | Unique name for the role. Note that after you create the role, you cannot edit the role name. You cannot use the following special characters in the role name: < > |
| Description | Description of the role. |
| Valid From | Start date of the period of time that the role is valid. |
| Valid Until | End date of the period of time that the role is valid. The date is optional. By default, roles do not have an end date unless you specify one. Roles without an end date are valid indefinitely. |

4. Click **Save.**

## Step 3. Assigning the Data Vault Access Role to a Reports Entity

After you create the access role, assign it to the entity or entities that contain the materialized views used to create the Patient Archive reports.

1. Click **Administration** > **Manage Roles**.
2. Click **Assign Role to Entity**.
3. Choose the Patient Archives report entity that you want to assign the access role to.
4. Click **Add Role**.

   If the entity has role assignments, a list of the assigned roles appears.
5. Click **Add Role**.

   A new line appears in the list of roles.
6. Select the Data Vault access role that you created and enter the validity dates of the role assignment.
7. Click **Save**.

## Step 4. Assigning Roles to a User

Assign both the access role that you created and the system-defined roles for healthcare to the user who will access the Patient Archives.

1. Click **Administration** > **Manage Users**.

   A list of users appears.
2. Click **Edit** next to the healthcare user that you created, or the user that you want to assign Patient Archive privileges.

   The user details appear.
3. Click **Add Role**.

   A new line appears in the list of roles.
4. Select the access role that you created and enter the validity dates of the role assignment.
5. Click **Add Role**.

   A new line appears in the list of roles.
6. Select either the Report Viewer or Report Designer role and enter the validity dates of the role assignment.

   If you want the user to have both the Report Viewer and Report Designer roles, repeat the step and select the other role.
7. Click **Add Role**.

   A new line appears in the list of roles.
8. Select the Healthcare Portal User role.

   If the user needs the ability to add a payment to a patient account, repeat the step and assign the Healthcare Account Admin role to the user.
9. Click **Save**.

# Configure Accounts Receivable Burndown

To configure Accounts Receivable Burndown, assign the accounts receivable reports to the Accounts Receivable Burndown entity. Then review how to format the CSV data file for bulk uploads.

## Assigning the Accounts Receivable Reports to the Accounts Receivable Burndown Entity

In the Data Archive user interface, assign the accounts receivable reports to the Accounts Receivable Burndown entity.

1. Click **Administration** > **Manage AR Report & Entity Association**.

   The **Manage Accelerator Reports** page appears.

2. Click **Assign Report to Entity**.

   The **Assign Report to Entity** page appears.

3. To select a value for each field, click the **List of Values** button next to each of the following entity properties:

| Property | Description |
|---|---|
| Application Version | Version of the accelerator that you installed. |
| Application Module | Healthcare accelerator application module. |
| Entity Name | Healthcare AR entity. |

4. Click **Assign Report**.

   A new row appears in the Assign Report table.

5. Click the **List of Values** button next to the Accelerator Type field and select **Healthcare**.
6. Click the **List of Values** button next to the Report Name field and select **Add Payment**.
7. Click **Save**.

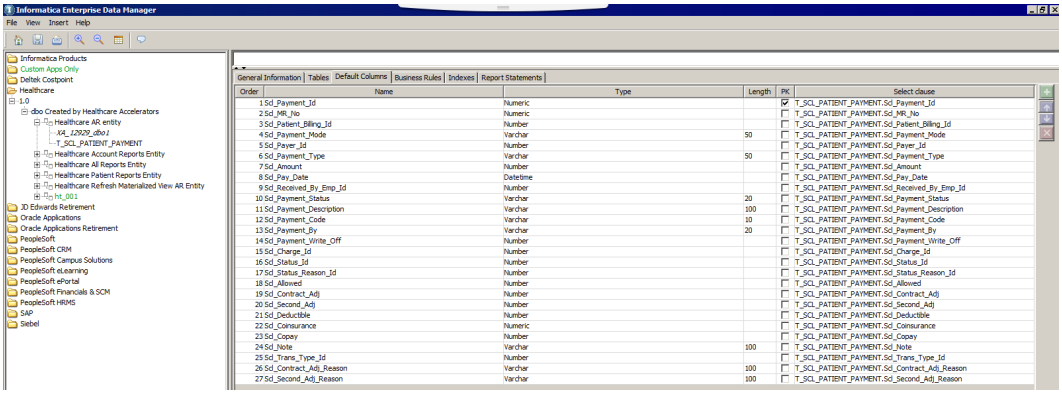
## CSV Data File Formatting for Accounts Receivable Burndown

To add multiple payments to one or more patient accounts at the same time, Data Archive users can submit a CSV data file. The data file triggers the update for AR Burndown standalone job, which updates the patient payment information in the Data Vault. Users must format the CSV file to match the default columns of the AR Burndown entity interim table.

The Accounts Receivable Burndown function gives users the ability to upload a CSV file that contains information about multiple payments. When a user submits the data file, it triggers the update for AR Burndown standalone job. The job first runs multiple validation steps, including a check to verify if the user who submitted the data file has the Healthcare Account Admin system-defined role. If validation is successful, the job reads the CSV data file and generates a BCP file and a metadata file in the staging location. Then the job calls a JSP that updates the patient payment information table in the Data Vault with the new payment information.

In order for the update for AR Burndown job to correctly generate the BCP file, the user must format the CSV data file in a specific way. The order of the default columns present in the Accounts Receivable Burndown entity interim table must match the order of entries in the CSV file.

The following image shows interim table columns of the Accounts Receivable Burndown entity in the Enterprise Data Manager:

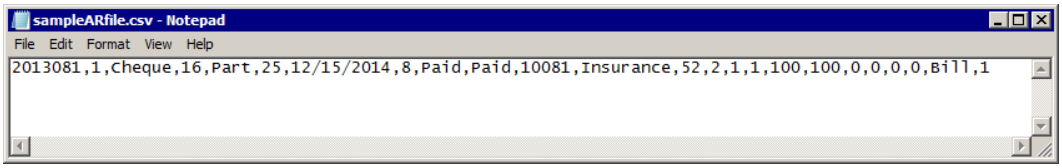



Each entry in the CSV file must be separated by a comma. Any mismatch in column order between the CSV file and the interim table might result in incorrect BCP file generation when the user submits the file.

If the column is marked as a primary key, the user does not have to enter a value for that column in the CSV file. Columns marked as primary keys in the Enterprise Data Manager must be numeric columns.

The information for each payment must be entered on a single line in the CSV file. There is no limit to the number of payments users can submit in one CSV file.

The following images shows an example of a CSV file with values for each of the default columns in an Accounts Receivable Burndown entity interim table:




# Copying the Accounts Receivable Burndown Entity

You can copy the Accounts Receivable Burndown entity from one schema to another.

When you copy the AR Burndown entity from one schema to another, perform the following tasks:

1. Copy the AR Burndown entity to the new schema.
2. Remove the table from the entity, as well as the interim tables and tables tabs.
3. Right-click the entity and select **Insert Table** from the respective schema.
4. Add the table in the interim tables and tables tabs, with the insert statement as "1=1" and delete statement as "1=0."
5. Save the entity and run the AR Burndown job.

CHAPTER 4

# Accounts Receivable and Claim Reports

This chapter includes the following topics:



## Accounts Receivable and Claim Reports Overview

Data Archive users assigned to the Healthcare_Account_Reports entity or the Healthcare_All_Reports entity can run accounts receivable reports in the Accounts Receivable area of the Patient Archives. In addition, users with the Healthcare Account Admin role can add a payment to a patient account. If you are unsure whether or not you have the correct role to run a report or submit a payment, contact a Data Archive Administrator.

Accounts receivable reports contain information about money owed to an organization by patients or insurance providers. You can view the accounts receivable reports in different forms, including a summary report, an analysis report, and a details report.

If a patient or an insurance provider submits a payment, you can add the payment information to the patient account. This ensures that the accounts receivable reports reflect accurate balances. If a patient submits a payment themselves, you can add the payment to their account in the Payments area. Or, to add more than one payment at a time, you can submit a data file through the Accounts Receivable Burndown function that contains information about multiple payments to multiple patient accounts. You can also post payments submitted by an insurance provider or company through the Accounts Receivable Details report.

Claim reports contain information about health insurance claims, such as the claim status, the insurance provider, and the insurance policy number. You can search for an individual claim to view the claim details, or you can generate a list of all claims within a specified time period.

Accounts receivable reports and claim reports are types of Data Visualization reports. For more information about Data Visualization reports, see the *Informatica Data Archive User Guide*.

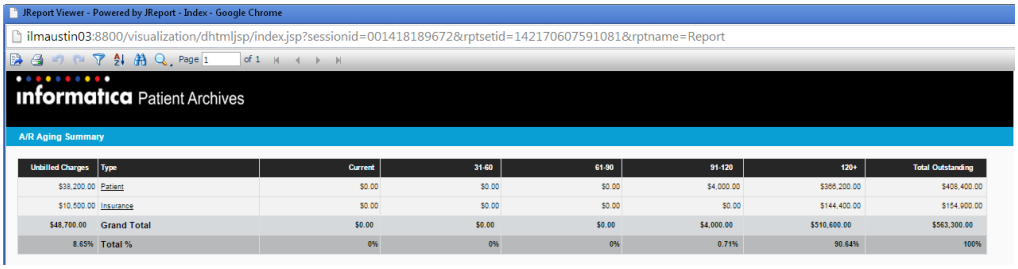
# Accounts Receivable Report Types

You can run the following types of accounts receivable reports:

**Accounts Receivable Summary**

The accounts receivable summary report summarizes the unpaid balances of all patients combined and all insurance providers combined. The report is organized by how many days the invoices are past due.

The following image shows an example of the accounts receivable summary report:

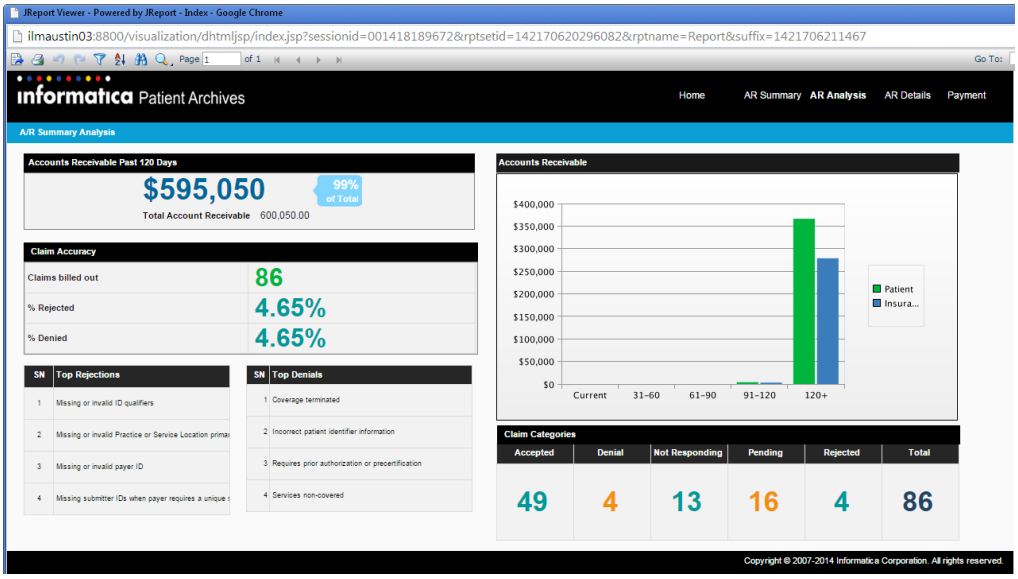



To view a summary of outstanding balances by individual patients or insurance providers, click the **Patient** or **Insurance** links in the Type column of the report.

**Accounts Receivable Analysis**

The accounts receivable analysis report contains information about the total outstanding accounts receivable amount. It also contains summary information about the number of claims billed, the percentage of claims rejected or denied, and the reasons for rejection or denial.

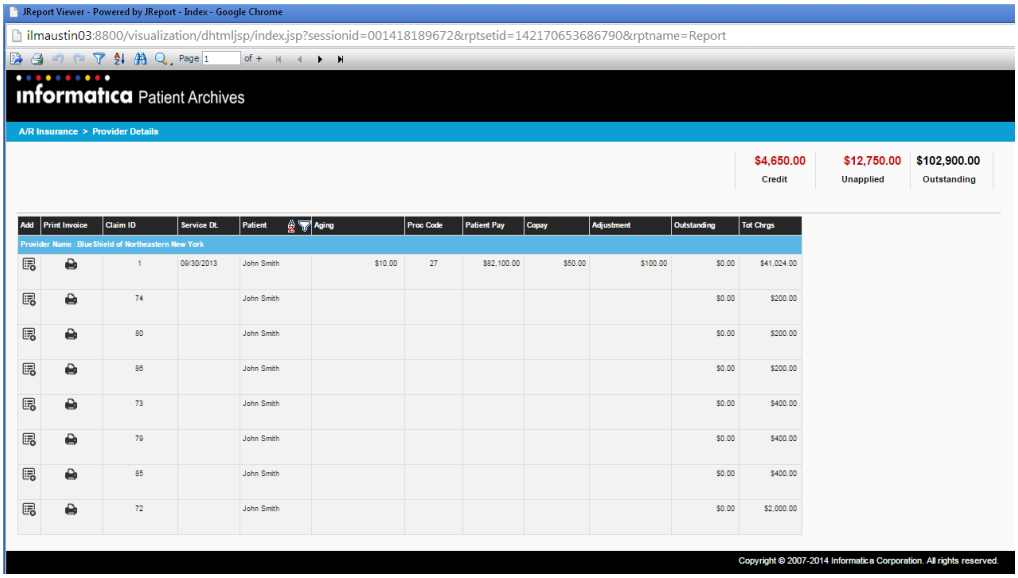
The following image shows an example of the accounts receivable analysis report:




**Accounts Receivable Details**

The accounts receivable details report contains detailed accounts receivable information that you can generate by insurance provider, insurance plan, or patient. The report contains details such as the claim ID, procedure code, patient payment, adjustment and copay amounts, and total charges.

The following image shows an example of the accounts receivable details report, generated by insurance provider:




Each row in the table represents an invoice associated with the selected insurance provider. To print an invoice, click the **Printer** button. If an insurance provider or company submits a payment for a patient account, you can click the **Add** button to apply the payment to the patient account through the associated invoice.

# Running Accounts Receivable Reports

To run an accounts receivable report, select the type of report that you want to run. Optionally, apply filters or hide columns in the report before you run it.

If you use the Google Chrome browser, you must disable the pop-up blocker before you run a report.

1. In the Data Archive user interface, click **Data Visualization** > **Patient Archives**.

   You might receive a prompt to select the archive folder where the healthcare application was retired. If you do not know the name of the application archive folder, contact a Data Archive administrator. If you do know the name of the archive folder, select it and click **OK**.

   The **Patient Archives** landing page appears.
2. Click the **Accounts Receivable** icon.

   The **Accounts Receivable** page appears.
3. To select which report you want to run, click one of the accounts receivable report icons.
4. Optionally, select report filters such as insurance provider or clinic location to filter the report information by certain criteria.
5. Optionally, select the check box next to any column that you do not want to appear on the report.
6. To run the report, click **Apply**.
7. Optionally, print or export the report by clicking the **Print** or **Export** buttons at the top of the report.

# Payment Processing

If a patient or an insurance provider submits a payment, you can add the payment to the patient's account in the accounts receivable area of the Patient Archives. Add a payment to a patient account so that you can run accounts receivable reports with accurate outstanding balances.

If a patient submits a payment themselves, you can add the single payment to the patient account in the Payments area. When you add a single payment to a patient account, you search for the patient by name and then enter details related to the payment, such as the payment amount and date.

You can also add a single payment from an insurance provider or company to a patient account. To process a payment from an insurance company or provider, run the Accounts Receivable Details report and add the payment through the report.

You can also add multiple payments for one or more patient accounts at the same time with the Accounts Receivable Burndown function. To submit multiple payments at the same time, you must create a CSV data file that contains the payment details. Use a text editor such as Notepad to create and save the file as a CSV file. You must format the file in a specific way and then submit the file for Data Archive to process. If you are unsure how to format the CSV data file, contact a Data Archive Administrator.

When you submit multiple payments in a CSV data file, Data Archive runs a standalone job that updates the patient account information to reflect the new account balance. Before the new balance appears in any accounts receivable reports, you or a Data Archive administrator must run the refresh materialized views standalone job. The accounts receivable reports generate the report information based on the materialized views. For more information about the refresh materialized views standalone job, see the chapter *Materialized Views and View Definitions* or contact a Data Archive administrator.

## Adding a Patient-Submitted Payment to a Patient Account

To add a single patient-submitted payment to a patient account, select the appropriate transaction and then enter the payment details.

1. Click **Data Visualization** > **Patient Archives**.

   You might receive a prompt to select the archive folder where the healthcare application was retired. If you do not know the name of the application archive folder, contact a Data Archive administrator. If you do know the name of the archive folder, select it and click **OK**.

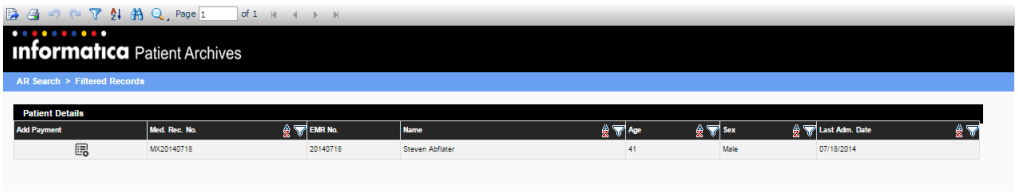
   The **Patient Archives** landing page appears.

2. Click the **Payments** icon.

   The **Patient Search** page appears.

3. Enter all or part of the patient's name and click **Apply**. The search function is not case-sensitive.

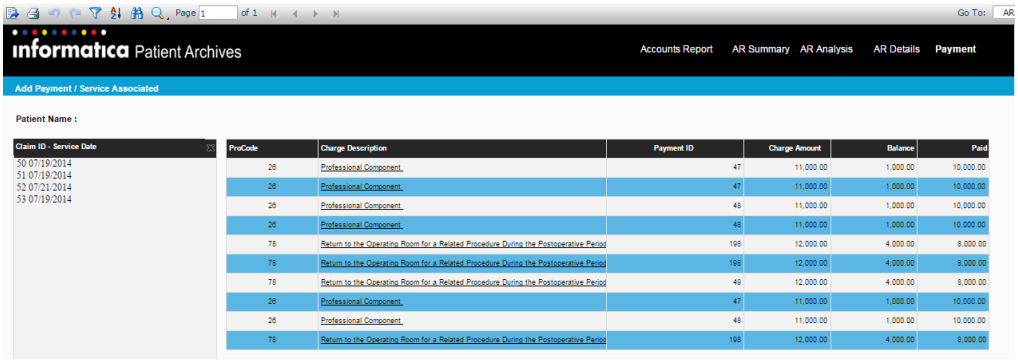
   The **Filtered Records** page appears.




4. Find the correct patient in the list of records and click the **Add Payment** button next to the patient's medical record number.

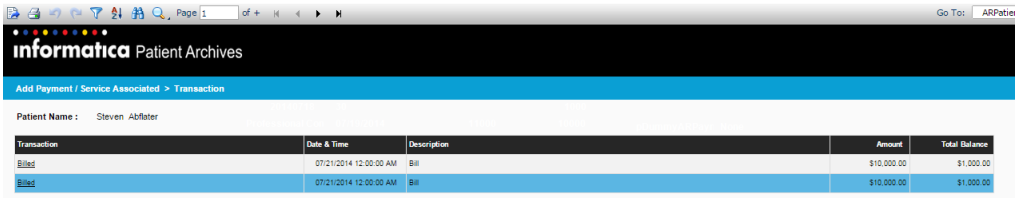
If your search returns multiple results, you can filter the results by medical record number, age, or other criteria to help you find the correct patient.

The **Service Associated** page appears.




5. To select the charge that you want to apply the payment to, click the **Charge Description** link.

   The **Transaction** page appears.

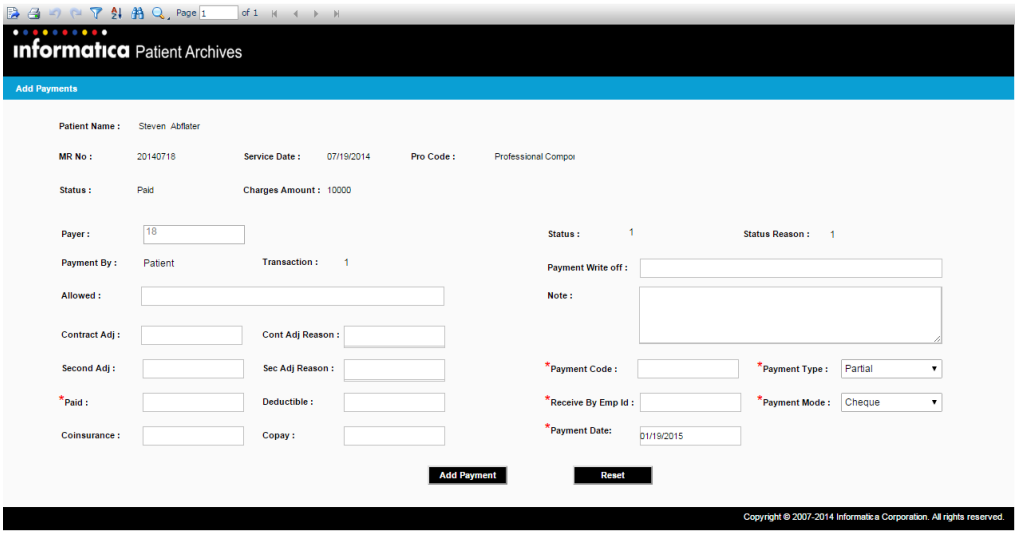



6. To select the transaction that you want to apply the payment to, click the **Transaction** link next to the correct transaction.

   The **Details** page appears.

7. From the menus, select the transaction type, the status, and the status reason.
8. Click **Apply**.

   The **Add Payments** page appears.




9. Enter the required payment details.
10. Click **Add Payment**.

    A dialog box appears to tell you that you will be redirected to the **Monitor Jobs** page, where you can monitor the status of the job that updates the patient account information.
11. Click **OK**.

    For more information about monitoring jobs, see the *Informatica Data Archive User Guide*.

## Adding a Payment Submitted by an Insurance Provider or Plan to a Patient Account

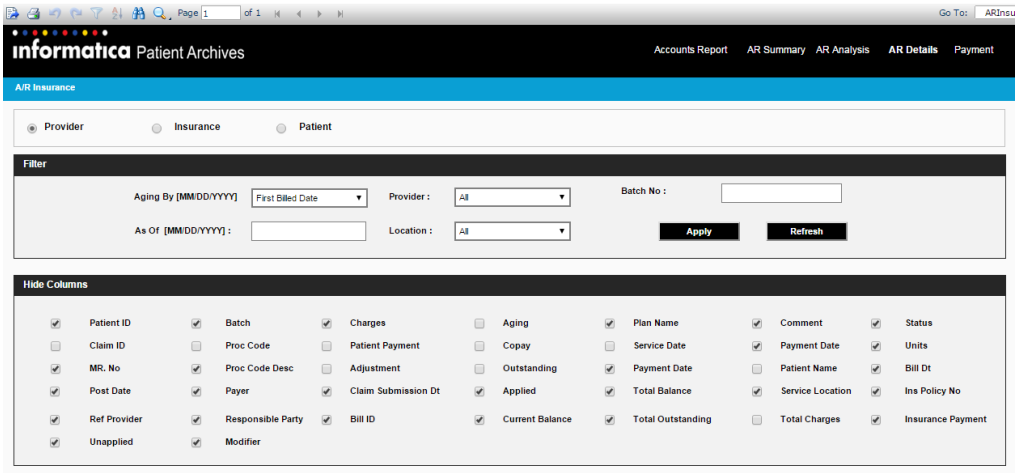
To add a payment submitted by an insurance provider or plan to a patient account, run the Accounts Receivable Details report and find the correct invoice.

1. Click **Data Visualization** > **Patient Archives**.

   You might receive a prompt to select the archive folder where the healthcare application was retired. If you do not know the name of the application archive folder, contact a Data Archive administrator. If you do know the name of the archive folder, select it and click **OK**.

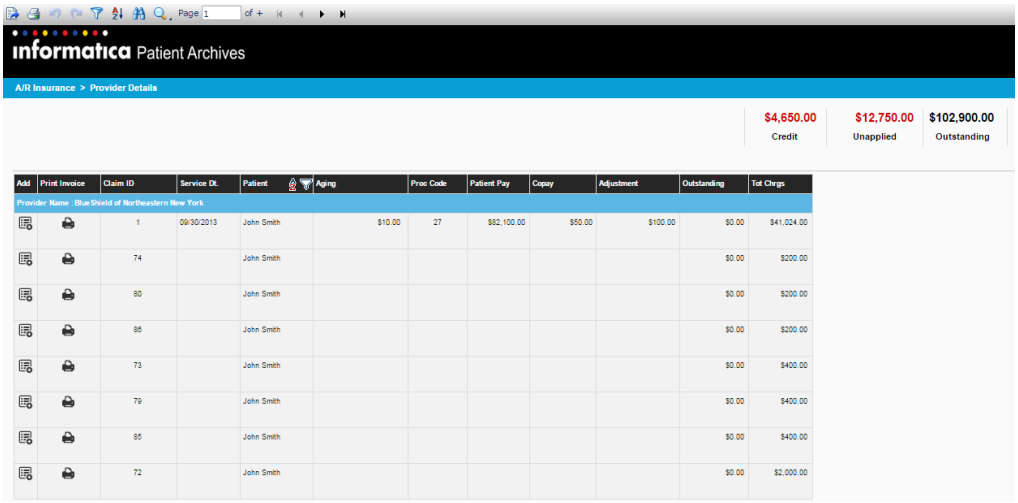
   The Patient Archives landing page appears.
2. Click the **A/R Details** icon.

   The **A/R Insurance** page appears.
3. To select the type of payment, click the button next to **Provider** or **Insurance**.
4. Optionally, select filters to limit the number of patient records the search returns.
5. Optionally, select the check box next to any columns that you want to hide on the report.




6. Click **Apply**.

   The **Provider Details** page appears.




7. In the Claim ID column, find the claim associated with the submitted payment and click the **Add** button in the same row.

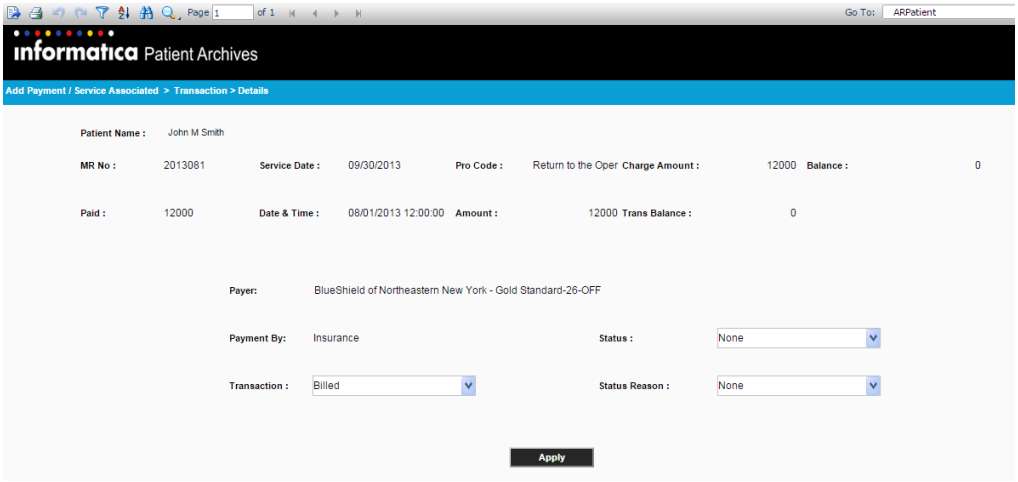
   The **Service Associated** page appears.


8. In the Charge Description column, click the link associated with the correct charge on the invoice.

The **Transaction** page appears.

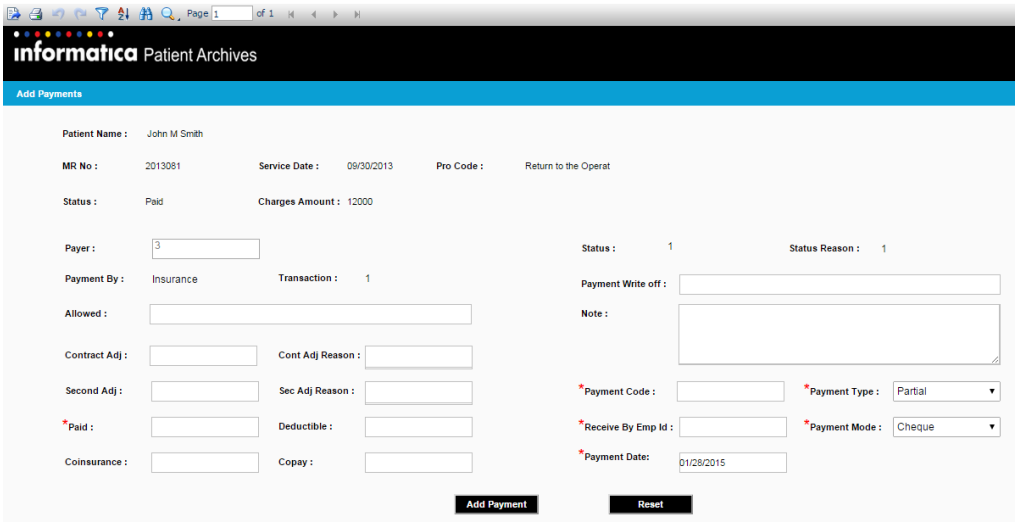
9. In the Transaction column, click the **Billed** or **Adjustment** link.

   The **Details** page appears.




10. Optionally, select a status and status reason from the menus and click **Apply**.

    The **Add Payments** page appears.




11. Enter the required payment information and click **Add Payment**.

    A dialog box appears to tell you that you will be redirected to the Monitor Jobs page, where you can monitor the status of the job that updates the patient account information.

12. Click **OK**.

    For more information about monitoring jobs, see the *Informatica Data Archive User Guide*.

## Adding Multiple Payments to Patient Accounts

To add multiple payments to one or more patient accounts, submit a CSV data file that contains the payment information. You must correctly format the file for the update to complete successfully. If you are unsure how to format the CSV data file, contact a Data Archive Administrator.

1. **Note:** You cannot use the Microsoft Internet Explorer browser to submit the CSV data file.

   Click **Data Visualization** > **Patient Archives**.

   You might receive a prompt to select the archive folder where the healthcare application was retired. If you do not know the name of the application archive folder, contact a Data Archive administrator. If you do know the name of the archive folder, select it and click **OK**.

   The Patient Archives landing page appears.

2. Click the **A/R Burndown** icon.

   The **Bulk Upload** page appears.

3. Click **Upload** and select the CSV file that you created.

4. Click **Submit**.

   The job submits the CSV file for processing and opens the **Monitor Jobs** page, where you can monitor the job status.

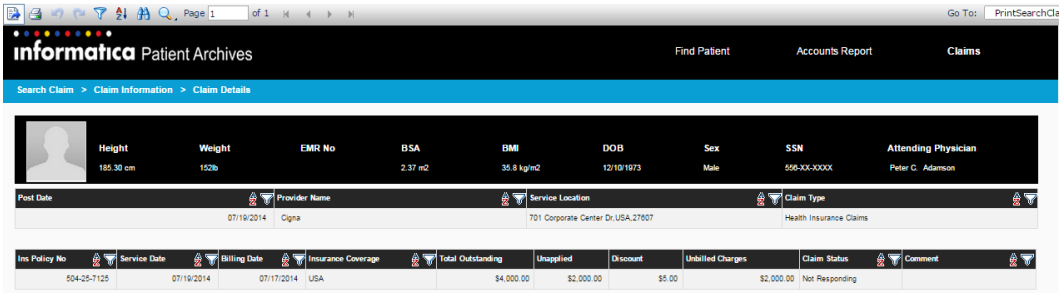
# Claim Reports

You can search by patient name to view an individual claim report, or you can generate a list of all claim reports within a specified time period.

Claim reports contain information about an insurance claim, which is a request asking an insurance company for a payment. Each claim report contains details about an individual claim, such as the insurance provider and policy number, the claim status, and the service date.

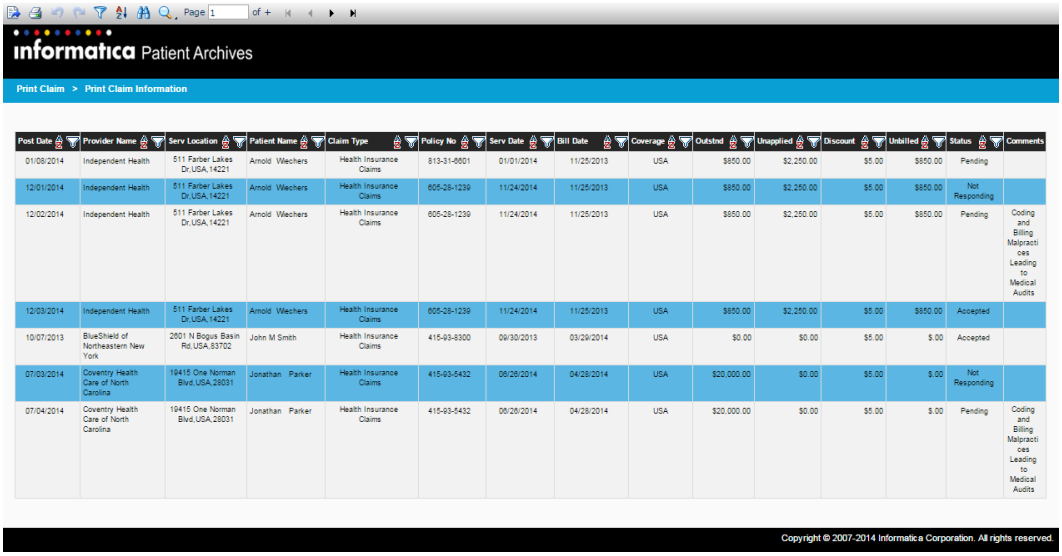
You can view a claim report by searching for the patient name. When you search for the patient, you can optionally include the claim status as a part of the search criteria. If you include the claim status in the search criteria, the search returns only claims with a certain status. You can also export or print the report.

The following image shows an example of a claim report:




You can also generate a report that lists all of the claims in the system within a specified time period. You can include the provider name, patient name, claim type, or claim status in your search criteria so that the search returns certain claims. You cannot view the individual claims in the report, only the basic details provided in the list, so this report is suitable for printing.

The following image shows an example of a report with multiple claims listed within a specified time period:




# Running Claim Reports

To run a claim report, choose the type of report that you want to run and search by either the patient name or a specified time period.

1. Click **Data Visualization** > **Patient Archives**.

   You might receive a prompt to select the archive folder where the healthcare application was retired. If you do not know the name of the application archive folder, contact a Data Archive administrator. If you do know the name of the archive folder, select it and click **OK**.

   The **Patient Archives** landing page appears.

2. Click the **Claims** icon.

   The **Search Claim** page appears.

3. Choose the type of claim report that you want to run.

   - To run an individual claim report, enter the patient name in the Patient Name field. Optionally, select a claim status from the menu. Then click **Apply**.
   - To run a claim report that lists all of the claims within a specified time period, select the **Print Claim** tab. On the **Print Claim** page, enter the dates of the claim search window. Optionally, select one or more search filters from the menu. Click **Apply**.

4. Optionally, print or export the report by clicking the **Print** or **Export** buttons at the top of the report.

CHAPTER 5

# Patient Information Reports

This chapter includes the following topics:



## Patient Information Reports Overview

Patient information reports contain medical information about a patient, such as lab results, allergies, and pharmaceutical orders. To run a patient information report, access the Patient Archives in the Data Visualization portal.

You can view a patient information report by searching for the patient's name. Or, you can search by other criteria, such as the medical record number or the patient date of birth. After you find the patient that you want to run a report on, select the type of report that you want to run. Each report type might contain multiple reports listed by the date that the patient received medical attention.

After you run the report, you can print or export the report in multiple file formats.

## Patient Information Report Types

You can run multiple types of patient information reports.

The following table describes the types of patient information reports that you can run:

| Report Name | Description |
|---|---|
| Vitals | Contains information about vital signs, such as blood pressure, respirations, and pulse. |
| Microbiology | Contains information about microbiology, such as culture tests and results. |
| Radiology | Contains information about radiology, such as CT exams and images. |
| Medication | Contains information about prescribed medications, such as medicine name and prescribed dose. |

| Report Name | Description |
|---|---|
| Orders | Contains information about drug orders, such as the order details and provider. |
| Blood Bank | Contains information about blood tests and transfusions. |
| Charges | Contains information about charges to a patient account, including the charge description, code, and amount. |
| Payment | Contains information about payments made to a patient account, including a description, code, and status. |
| Physician Note | Contains information about physician notes, such as event reports and discharge summaries. |
| Nursing Note | Contains information about nursing notes, such as changes in condition or discharge assessments. |
| Intake Output | Contains information about intakes and output, such as oral fluid intake. |
| Clinical Doc | Contains information about clinical documents, such as diagnosis history and immunization history. |
| Pathology | Contains information about pathology test results and ranges. |
| Plan of Care | Contains information about the physician's plan of care for the patient, including details and instructions. |
| Patient Alert | Contains information about patient alerts, such as a description of the alert and alert status. |
| Emergency Contact | Contains information about the patient's emergency contacts, such as their name and phone number. |
| Document | Contains information about medical record documents, including the document text and comments. |
| Transcription Doc | Contains information about transcription documents, including details and remarks. |
| Allergy | Contains information about allergies, including the allergy name, reaction, and severity. |
| Immunization | Contains information about immunizations, including the vaccine name and date administered. |
| Lab Result | Contains information about lab results, including the lab test name, values, and remarks. |
| ADT | Contains information about when and where the patient has been admitted, discharged, or transferred. |
| List of Problems | Contains information about noted problems, including the problem details, resolution, and comments. |
| Nursing Assessment | Contains information about nursing assessments, including the assessment date and details. |

| Report Name | Description |
|---|---|
| MRA | Contains information about medication administered, including the medication name and the date and time it was administered. |
| Pharmacy Order | Contains information about pharmacy orders, including the prescribing physician, order date, order details, and drug name. |
| Intervention | Contains information about interventions, including the physician name, intervention name and type, and intervention questions. |

# Running a Patient Information Report

To run a patient report, search for an individual patient and select the type of report that you want to run.

1. In the Data Archive user interface, click **Data Visualization** > **Patient Archives**.

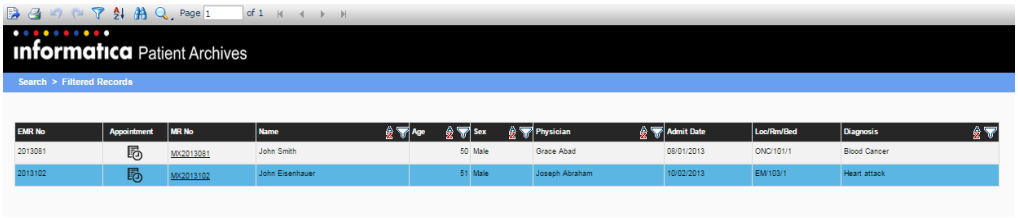
   You might receive a prompt to select the archive folder where the healthcare application was retired. If you do not know the name of the application archive folder, contact the Data Archive administrator. If you do know the name of the archive folder, select it and click **OK**.

2. Click the **Patient Search** icon.

   The **Search** page appears.

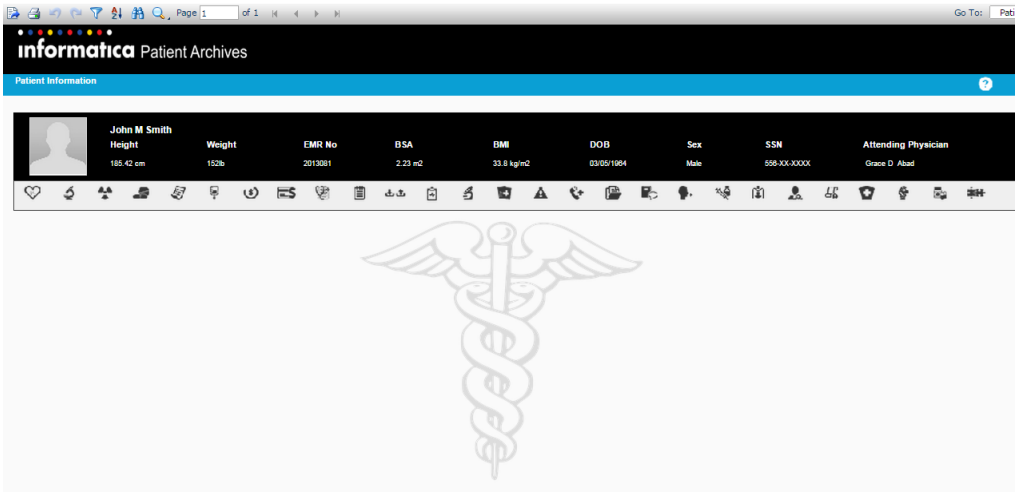
3. Enter all or part of a name in the Patient Search field and click **Apply**. Alternatively, click **Advanced Search** to search by other criteria such as patient date of birth, EMR number, and medical record number.

   The **Filtered Records** page appears.



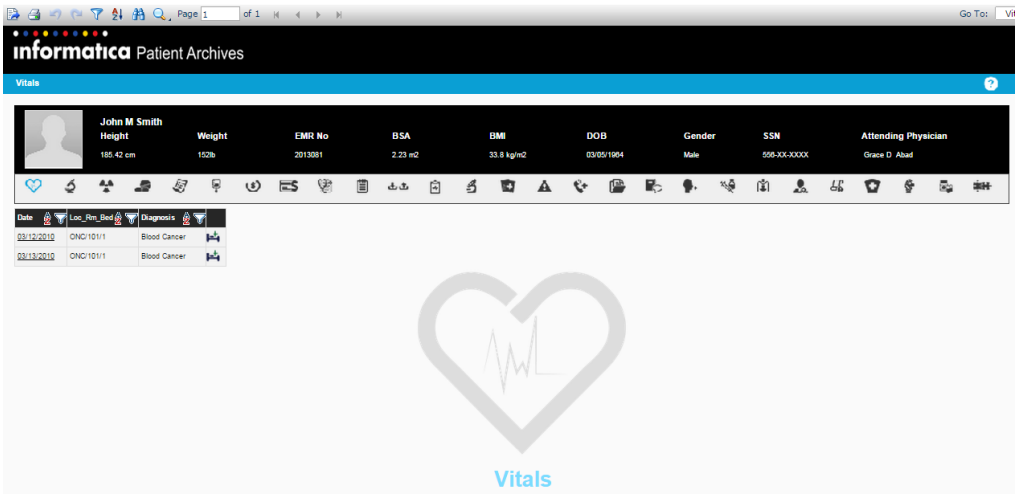

4. From the list of search results, click the **MR No** link next to the patient's name.

   The **Patient Information** page appears.



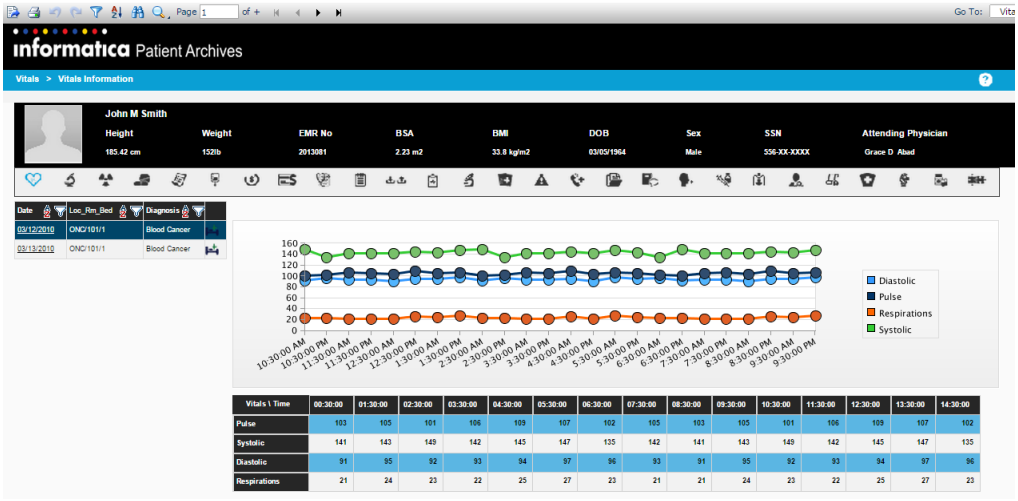

5. To view a report type, click a report icon at the top of the page. For example, to view all Vitals reports for a patient, click the **Vitals** icon.

   The report landing page appears.



6. To select an individual report, click the link in the Date column.

   The report opens in another window.




To export or print the report, click the **Export** or **Print** icons at the top of the window.