

# 1 Needy Individual Calculation - Workaround

The Patient Volume Report in the Third Party Billing Package does not give enough information to calculate the Needy Individual Patient Volume rate for providers or groups when the minimum Medicare volume of 30% is not met.

This is one process that can be used to calculate the needed information for attesting with a Needy Individual calculation.

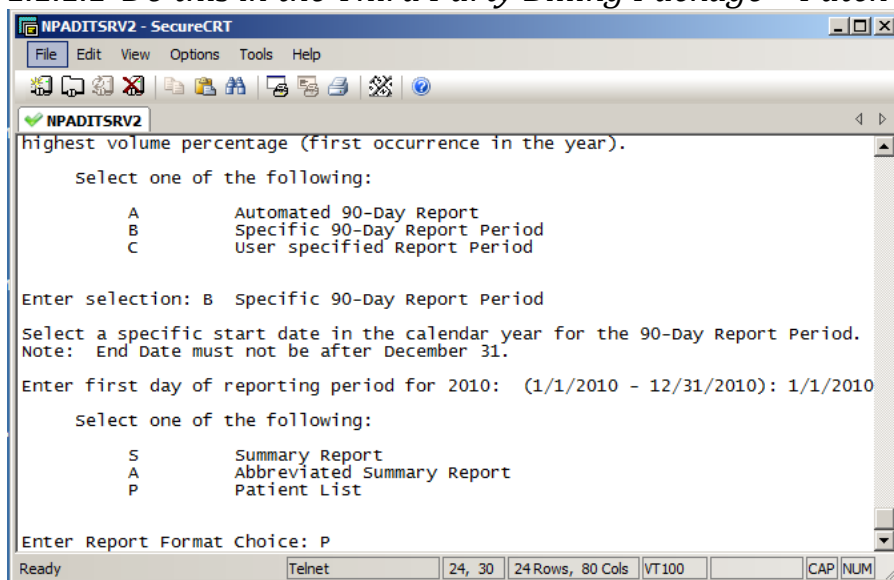
These steps are meant to be suggestive, only. They are one way to work with a Group (or Individual EP) Patient Volume report to calculate the Needy Individual Group Patient Volume rate for your facility.

The important thing is to document and save all of your work so it will support any audit by your state Medicaid office.

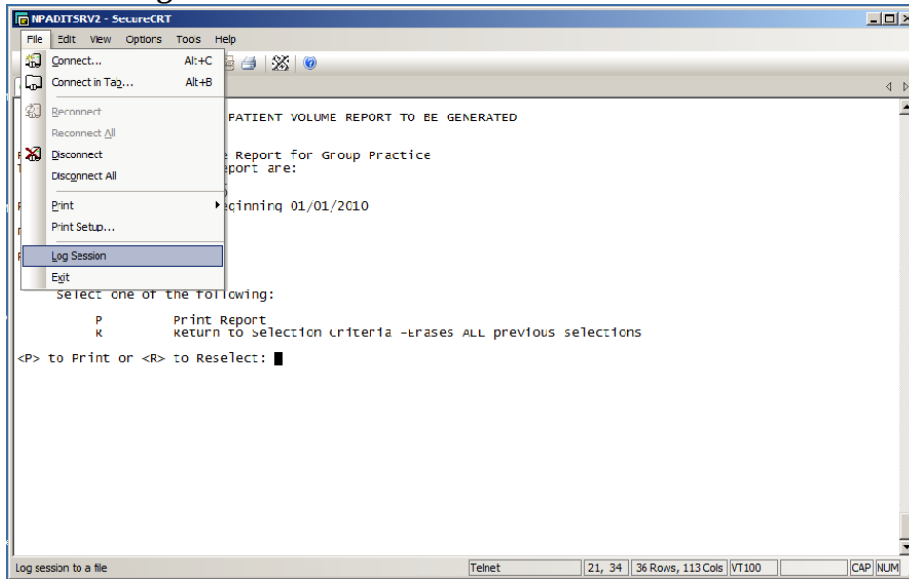
## 1.1 Running the Patient Group (or EP) Patient List

### 1.1.1 Run group (or EP) report Patient List

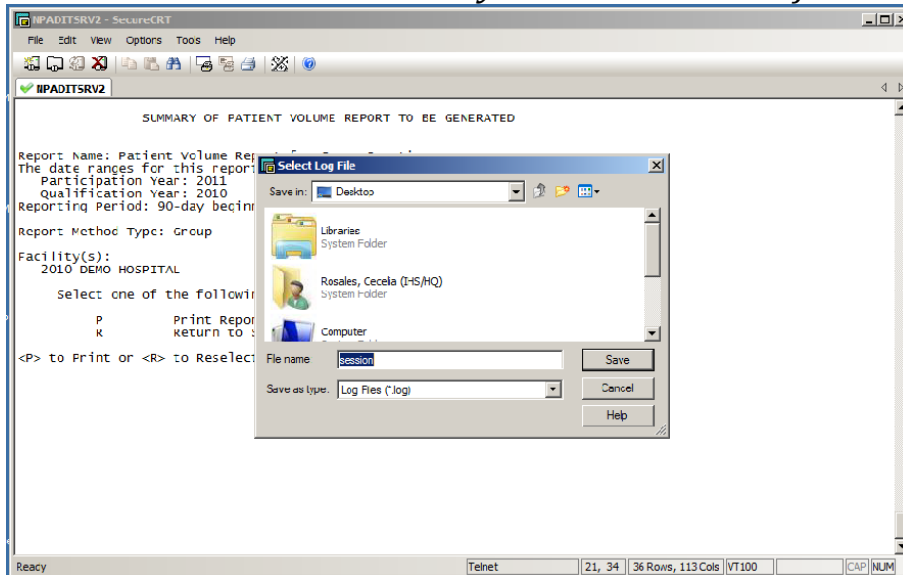
#### 1.1.1.1 Do this in the Third Party Billing Package – Patch 8 – PVP.



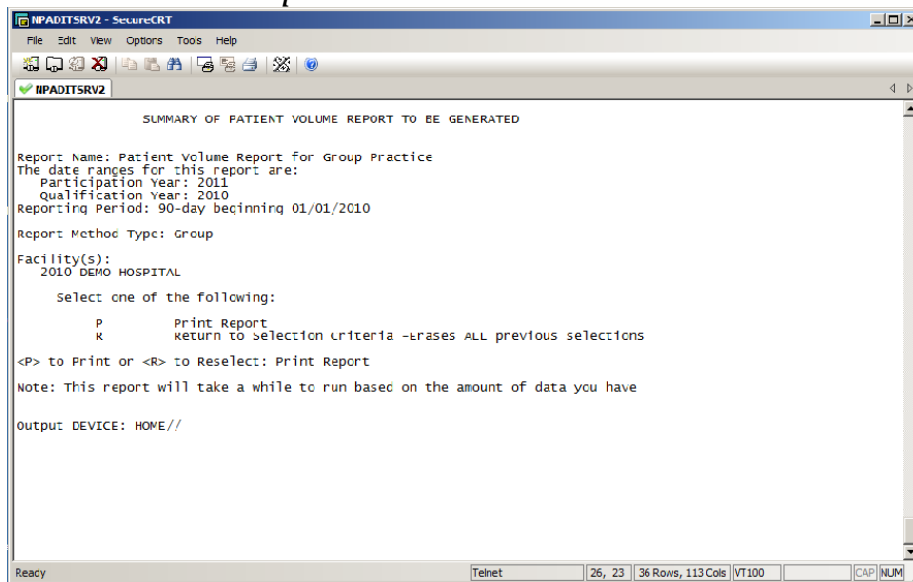
### 1.1.1.2 Log the session



### 1.1.1.3 Save the session where you can retrieve the file.



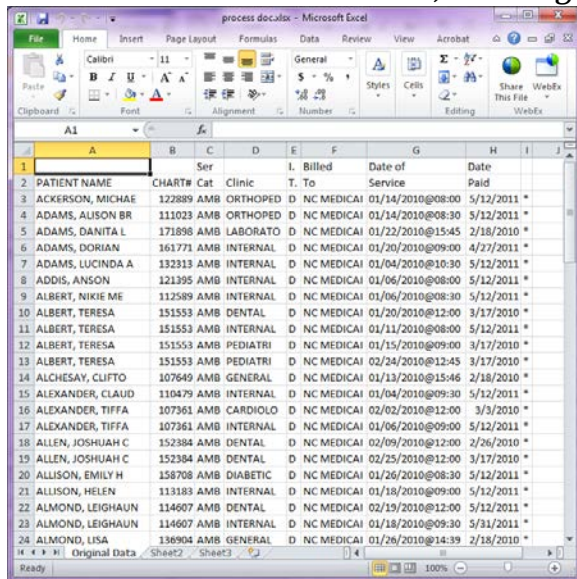
### 1.1.1.4 Run the report



## 1.2 Export list to Excel.

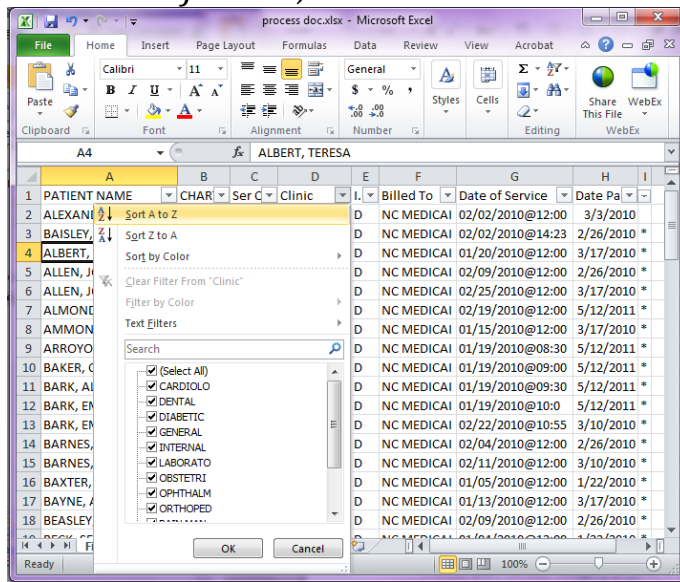
See directions at end of this document for an example of how this can be done. There are many other ways to do this.

### 1.2.1.1 Label the data sheet; as "Original Data."



1. Copy the Data to a new data sheet; work on the new page, so original data is retained for auditing purpose, and save your work.

### 1.2.1.2 Put filter in, label the data sheet as “Filtered” and sort by clinic.



### 1.2.1.3 Compare service category to clinic

If clinics are incorrect, such as telephone calls and chart reviews, pull these out of your totals by deleting these rows.

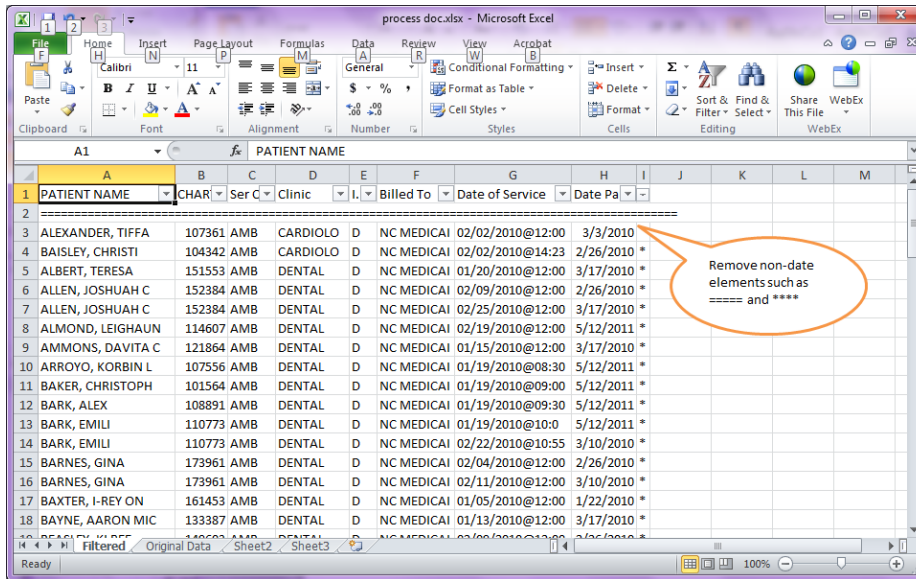
### 1.2.1.4 Determine Group

The following steps will depend upon your state's definition of “group” for calculating Patient Volume. They are meant to be a guide – you may need to add other steps.

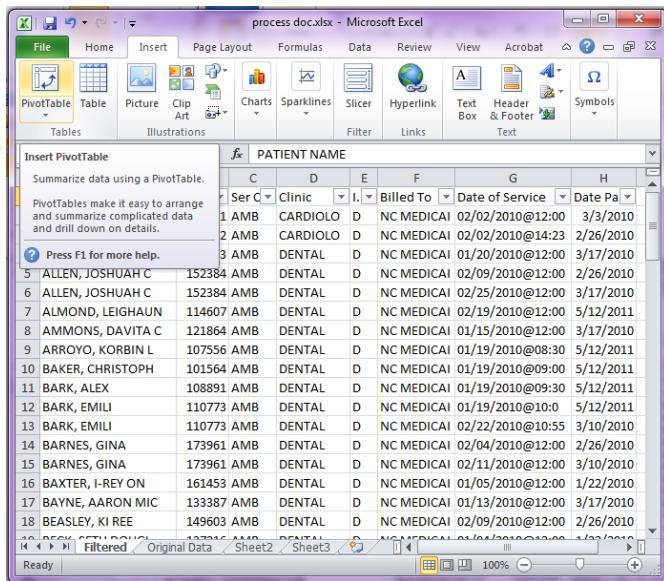
1. If your state considers a group as one NPI, and you have encounters that are billing under separate NPI, such as pharmacy, remove them.
2. Remove any other categories of encounters that your state doesn't count.
3. Copy the Data to a new data sheet; work on the new page, so original data is retained for auditing purposes.
4. Label this data sheet “Final Patient Volume Encounters” and save your work.

### 1.2.1.5 Create a pivot table to show paid encounter breakdown.

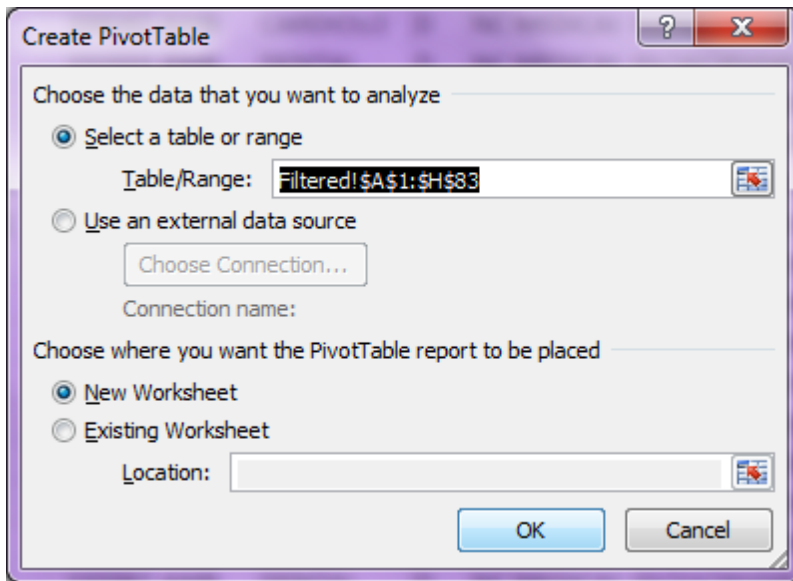
1. Remove non-data elements, such as dashed separator lines, asterisks in column I, etc. prior to creation of the Pivot Table



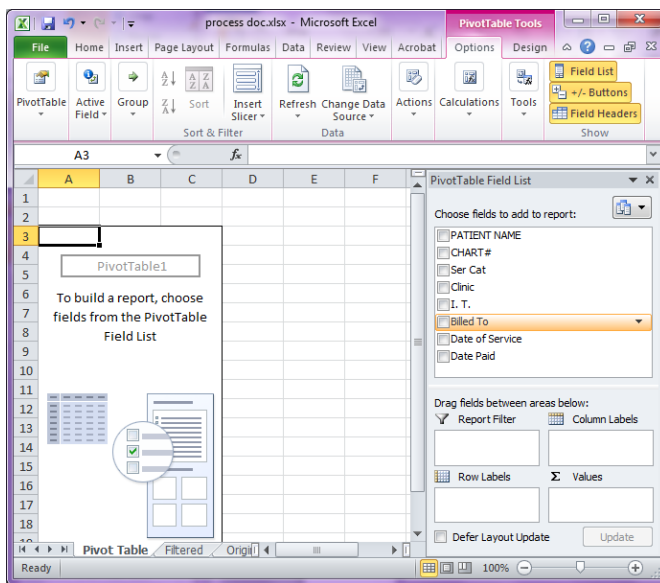
2. Find Insert Pivot Table command (may be located in different areas, depending on your version of Excel.)



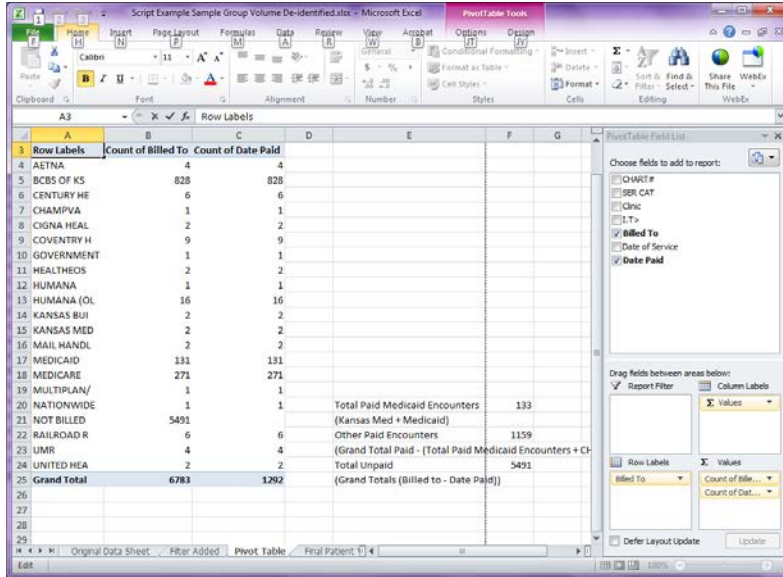
3. Select all Rows and Columns for your data table.



4. Pivot Table will be created on a new sheet. Label this sheet "Pivot Table"



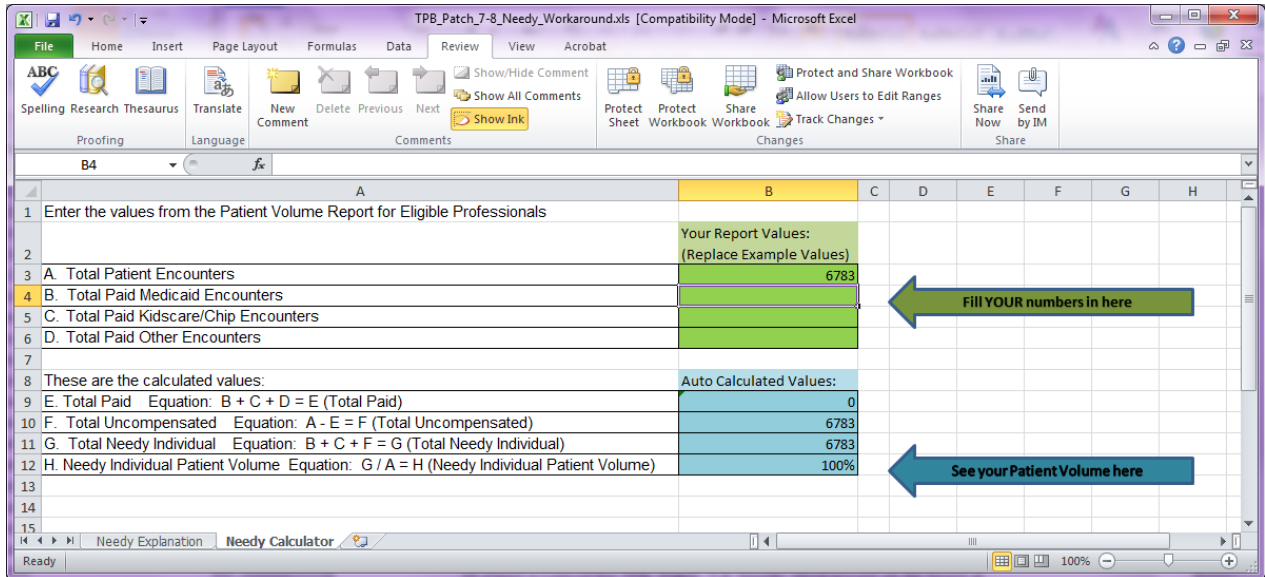
5. Select "Billed To" for Row Labels (May be able to drag & drop in some versions of Excel.)
6. Select "Billed To" and "Date Paid" for Values (May be able to drag & drop in some versions of Excel.)



This can be found at <http://www.ihs.gov/meaningfuluse/index.cfm?module=toolkit> .

### 1.2.1.7 Note the Grand Total of Billed To value

Enter in in cell B3, "A. Total Patient Encounters" of the Needy Calculator page, and save your work.



### 1.2.1.8 Calculate Values

There are several ways these calculations may be done – please contact your IT Support if you need assistance in developing formulas for your cells.

1. In a separate cell on the Pivot Table page, add all of the Medicaid and any other paid encounters (Except CHIPS) that are countable for your state's Needy Individual calculation, and label this cell "Total Paid Medicaid Encounters." Enter this number on the TPB\_Patch\_7-8\_Needy\_Workaround.xls file in cell B3, "B. Total Paid Medicaid Encounters" of the Needy Calculator page.
2. If you have them, in a separate cell on the Pivot Table page, calculate the total of the CHIPS total in cell B4, "C. Total Paid Kidscare/Chip Encounters," label this cell.
3. In a separate cell on the Pivot Table page, calculate the total of Other Paid Encounters (Grand Total Date Paid – (Total Paid Medicaid + CHIPS)), label this cell.
4. In a separate cell on the Pivot Table page, calculate the total of Unpaid Encounters (Grand Total Billed to - Grand Total Date Paid), label this cell and save your work.

	Count of Billed To	Count of Date Paid
4	4	4
5	828	828
6	6	6
7	1	1
8	2	2
9	9	9
10	1	1
11	2	2
12	1	1
13	16	16
14	2	2
15	2	2
16	2	2
17	131	131
18	271	271
19	1	1
20	1	1
21	5491	
22	6	6
23	4	4
24	2	2
25	6783	1292

Total Paid Medicaid Encounters	131
(Kansas Med + Medicaid)	
Other Paid Encounters	1350
(Grand Total Paid - (Total Paid Medicaid Encounters + CHIPS))	
Total Unpaid	5491
(Grand Totals (Billed to - Date Paid))	

1 - Total Paid Medicaid Encounters  
2 - No CHIPS for this clinic  
3 - Other Paid Encounters  
4 - Total Unpaid



5. Enter the values for Steps 1, 2 & 3 in the corresponding cells of the workaround table.

	A	B	C	D	E	F	G	H	I
1	Enter the values from the Patient Volume Report for Eligible Professionals								
2		Your Report Values: (Replace Example Values)							
3	A. Total Patient Encounters	6783							
4	B. Total Paid Medicaid Encounters	133							
5	C. Total Paid Kidscare/Chip Encounters	0							
6	D. Total Paid Other Encounters	1159							
7									
8	These are the calculated values:	Auto Calculated Values:							
9	E. Total Paid Equation: B + C + D = E (Total Paid)	1292							
10	F. Total Uncompensated Equation: A - E = F (Total Uncompensated)	5491							
11	G. Total Needy Individual Equation: B + C + F = G (Total Needy Individual)	5624							
12	H. Needy Individual Patient Volume Equation: G / A = H (Needy Individual Patient Volume)	83%							
13									

6. Compare the Pivot Table “Grand Total Date Paid” encounters to cell B9, “Total Paid” of the workaround table. These numbers should match.

7. Compare the number of unpaid encounters on your “Final Patient Volume Encounters” data sheet (Step 4) to cell B10, “Total Uncompensated” of the workaround table. These numbers should match.

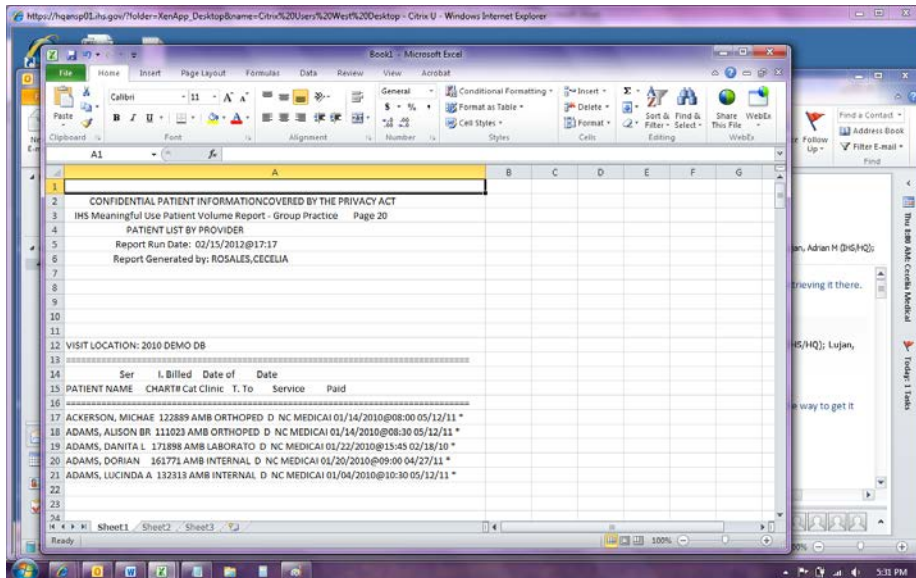
8. The Total Needy Individual values and Needy Individual Patient Volume rate will be calculated by the workaround sheet. These will be used to attest for Patient Volume.

## 2 Processing Data in Excel from Session Logging

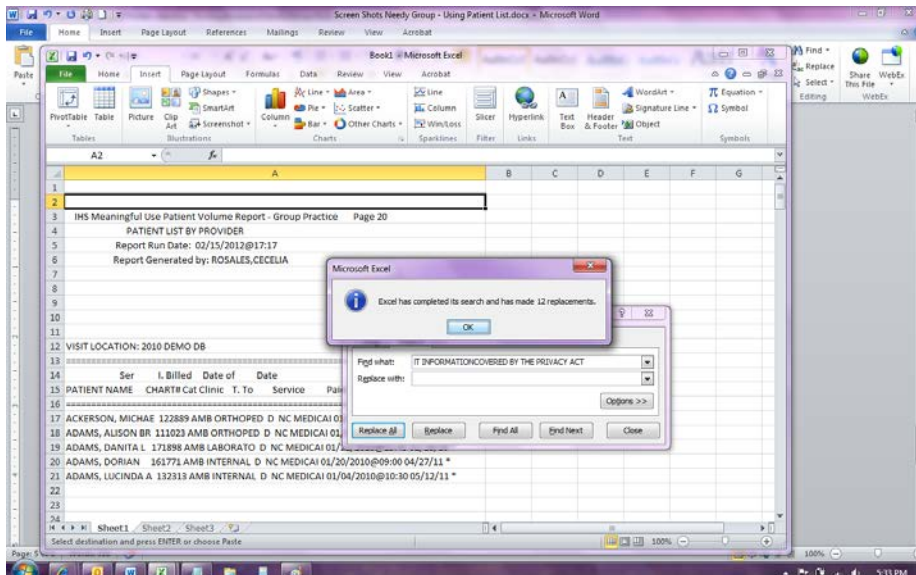
Log session when running the Patient List, and save the results for exporting to Excel. Consult with your IT Support about the best way to do this.

### 2.1 In Excel – One Suggested Method

Paste data from the log file into Excel – this will give you a single column of data, with repeated header information throughout your data.

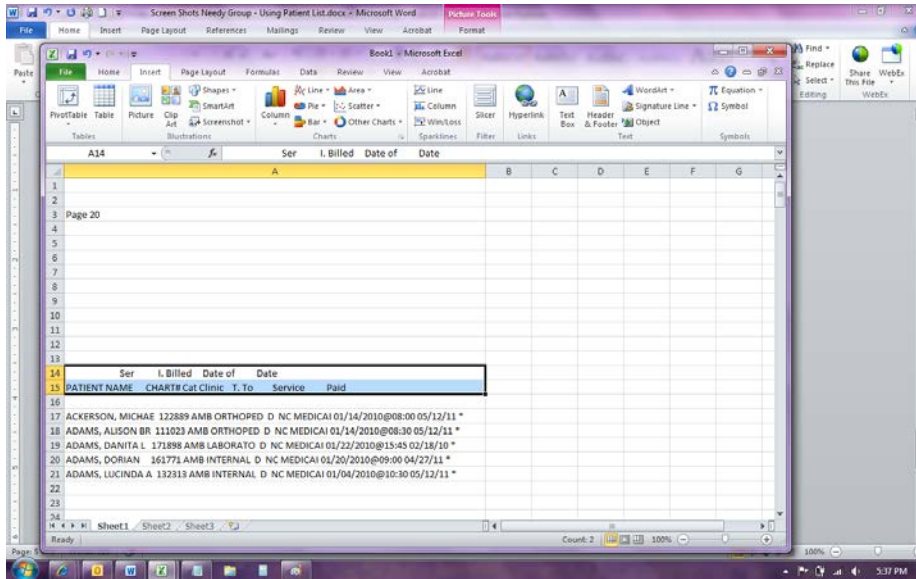


#### 2.1.1 Strip heading rows

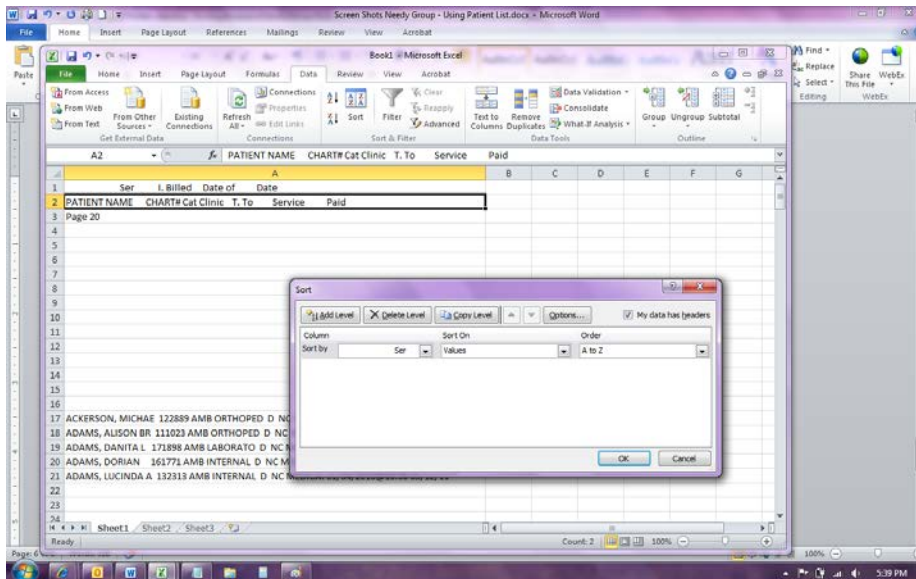


1. Copy repeated row from report header.
2. Paste row in Find, and leave Replace blank
3. Select Replace All.

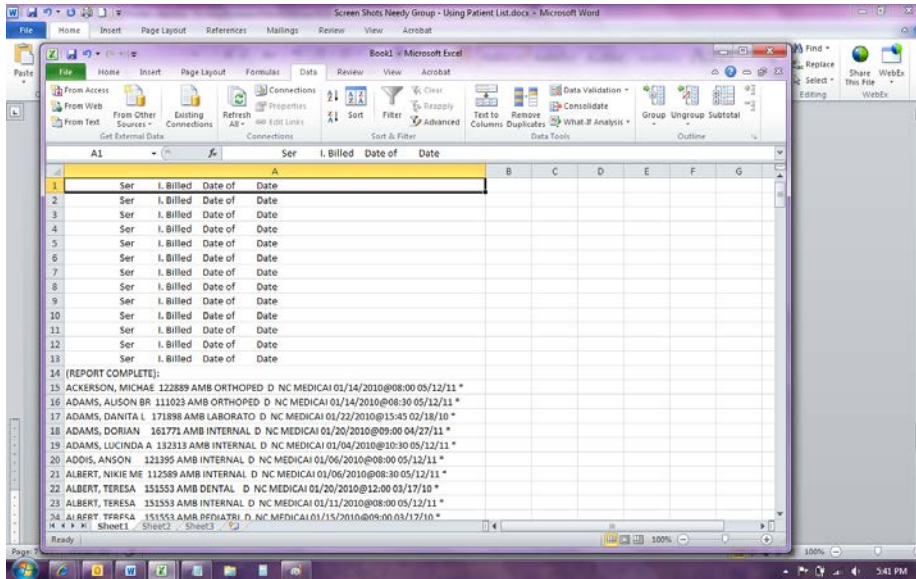
## 2.1.2 Move header rows to the top:



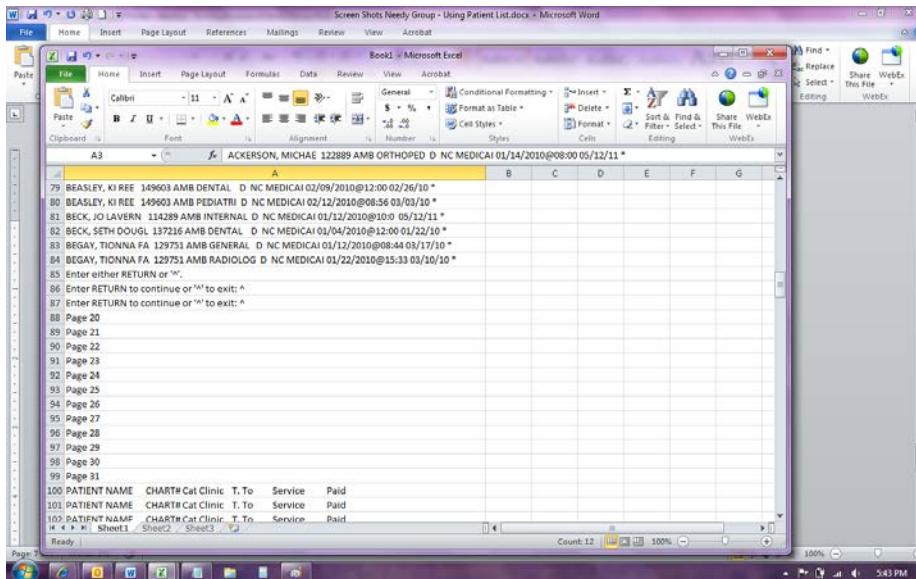
## 2.1.3 Sort, selecting Data Headers



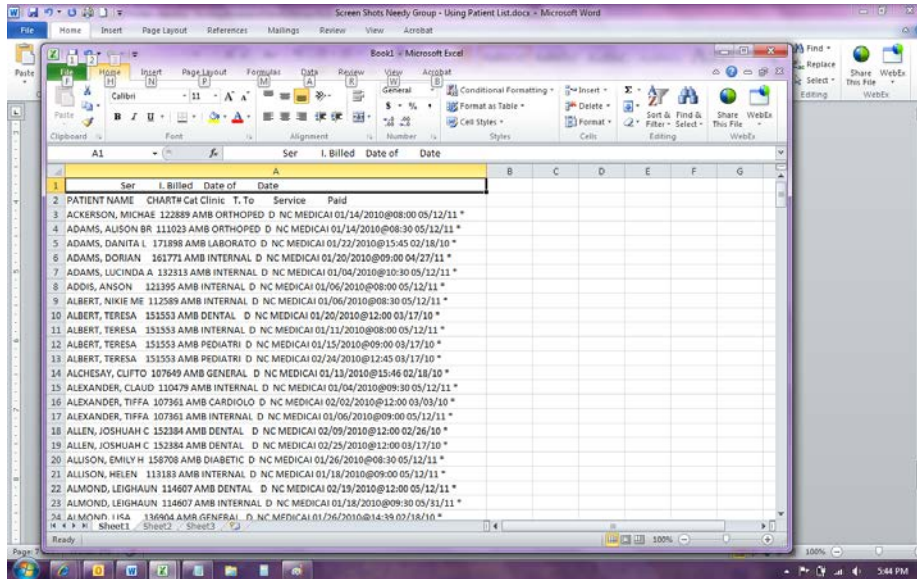
## 2.1.4 Clean up headers rows



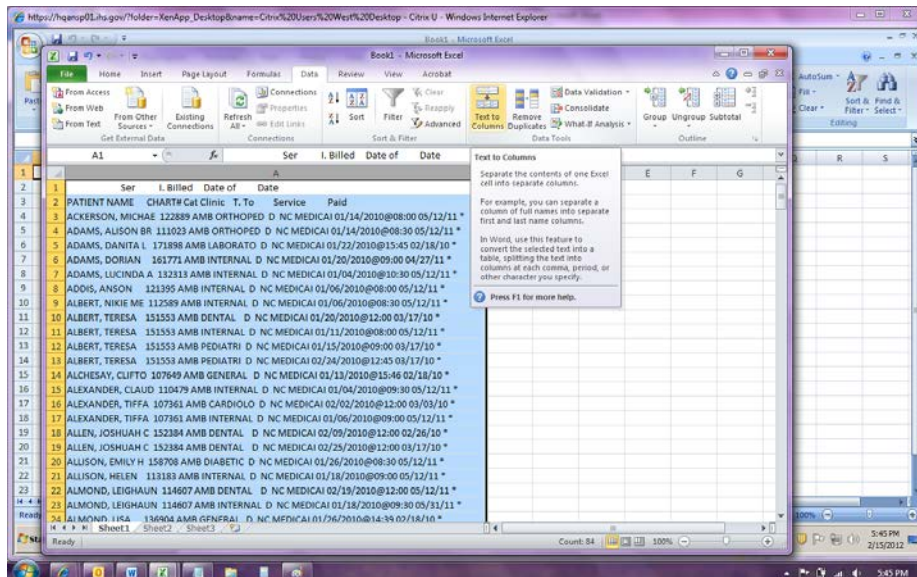
## 2.1.5 Clean up Page # rows



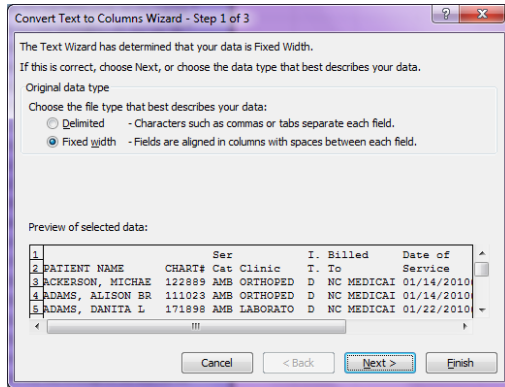
## 2.1.6 Move Patient Name header row to top.



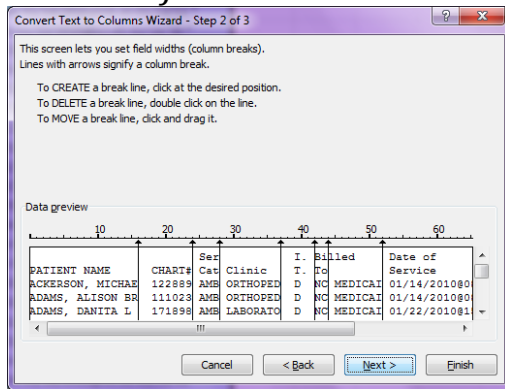
## 2.1.7 Split into columns using Text to Columns



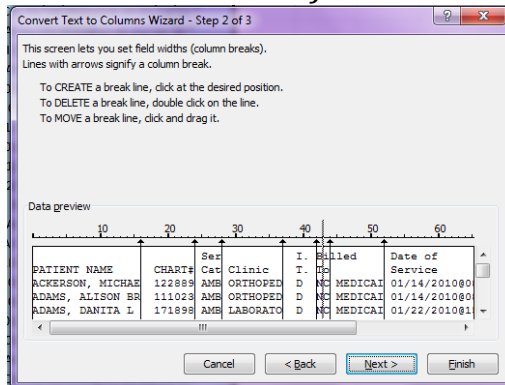
### 2.1.7.1 Select Fixed Width



### 2.1.7.2 Adjust the line in Billed to so it will become just one field.



### 2.1.7.3 Check other fields and adjust as needed, and then select Finish.



## 2.1.8 Adjust Column widths

PATIENT NAME	CHART#	Ser	Cat	Clinic	I. T.	Billed To	Date of Service	Date Paid
ACKERSON, MICHAEL	122889	AMB	ORTHOPEID			NC MEDIC	01/14/2011	*****
ADAMS, ALISON BR	111023	AMB	ORTHOPEID			NC MEDIC	01/14/2011	*****
ADAMS, DANITA L	171898	AMB	LABORATD			NC MEDIC	01/22/2011	*****
ADAMS, DORIAN	161771	AMB	INTERNALD			NC MEDIC	01/20/2011	*****
ADAMS, LUCINDA A	132313	AMB	INTERNALD			NC MEDIC	01/04/2011	*****
ADDIS, ANSON	121395	AMB	INTERNALD			NC MEDIC	01/06/2011	*****
ALBERT, NIKIE ME	112589	AMB	INTERNALD			NC MEDIC	01/06/2011	*****
ALBERT, TERESA	151553	AMB	DENTAL	D		NC MEDIC	01/20/2011	*****
ALBERT, TERESA	151553	AMB	INTERNALD			NC MEDIC	01/11/2011	*****
ALBERT, TERESA	151553	AMB	PEDIATRI	D		NC MEDIC	01/15/2011	*****
ALBERT, TERESA	151553	AMB	PEDIATRI	D		NC MEDIC	02/24/2011	*****
ALCHESAY, CLIFTO	107649	AMB	GENERAL	D		NC MEDIC	01/13/2011	*****
ALEXANDER, CLAUD	110479	AMB	INTERNALD			NC MEDIC	01/04/2011	*****
ALEXANDER, TIFFA	107361	AMB	CARDIOLOD			NC MEDIC	02/02/2010	3/3/2010
ALEXANDER, TIFFA	107361	AMB	INTERNALD			NC MEDIC	01/06/2011	*****
ALLEN, JOSHUAH C	152384	AMB	DENTAL	D		NC MEDIC	02/09/2011	*****
ALLEN, JOSHUAH C	152384	AMB	DENTAL	D		NC MEDIC	02/25/2011	*****
ALLISON, EMILY H	158708	AMB	DIABETIC	D		NC MEDIC	01/26/2011	*****
ALLISON, HELEN	113183	AMB	INTERNALD			NC MEDIC	01/18/2011	*****
ALMOND, LEIGHAUN	114607	AMB	DENTAL	D		NC MEDIC	02/19/2011	*****
ALMOND, LEIGHAUN	114607	AMB	INTERNALD			NC MEDIC	01/18/2011	*****
ALMOND, IISA	136904	AMR	GENERAL	D		NC MEDIC	01/26/2011	*****

## 2.1.9 Combine the top two lines, so all of the text for the header in in a single row.

PATIENT NAME	CHART#	Ser	Cat	Clinic	I. T.	Billed To	Date of Service	Date Paid
ALEXANDER, TIFFA	107361	AMB	CARDIOLO	D		NC MEDIC	02/02/2010@12:00	3/3/2010
BAISLEY, CHRISTI	104342	AMB	CARDIOLO	D		NC MEDIC	02/02/2010@14:23	2/26/2010
ALBERT, TERESA	151553	AMB	DENTAL	D		NC MEDIC	01/20/2010@12:00	3/17/2010
ALLEN, JOSHUAH C	152384	AMB	DENTAL	D		NC MEDIC	02/09/2010@12:00	2/26/2010
ALLEN, JOSHUAH C	152384	AMB	DENTAL	D		NC MEDIC	02/25/2010@12:00	3/17/2010
ALMOND, LEIGHAUN	114607	AMB	DENTAL	D		NC MEDIC	02/19/2010@12:00	5/12/2011
AMMONS, DAVITA C	121864	AMB	DENTAL	D		NC MEDIC	01/15/2010@12:00	3/17/2010
ARROYO, KORBIN L	107556	AMB	DENTAL	D		NC MEDIC	01/19/2010@08:30	5/12/2011
BAKER, CHRISTOPH	101564	AMB	DENTAL	D		NC MEDIC	01/19/2010@09:00	5/12/2011
BARK, ALEX	108891	AMB	DENTAL	D		NC MEDIC	01/19/2010@09:30	5/12/2011
BARK, EMILY	110773	AMB	DENTAL	D		NC MEDIC	01/19/2010@10:0	5/12/2011
BARK, EMILY	110773	AMB	DENTAL	D		NC MEDIC	02/22/2010@10:55	3/10/2010
BARNES, GINA	173961	AMB	DENTAL	D		NC MEDIC	02/04/2010@12:00	2/26/2010
BARNES, GINA	173961	AMB	DENTAL	D		NC MEDIC	02/11/2010@12:00	3/10/2010
BAXTER, I-REY ON	161453	AMB	DENTAL	D		NC MEDIC	01/05/2010@12:00	1/22/2010
BAYNE, AARON MIC	133387	AMB	DENTAL	D		NC MEDIC	01/13/2010@12:00	3/17/2010
BEASLEY, KI REE	149603	AMB	DENTAL	D		NC MEDIC	02/09/2010@12:00	2/26/2010
BECK, SETH DOUGL	137216	AMB	DENTAL	D		NC MEDIC	01/04/2010@12:00	1/22/2010
ALLISON, EMILY H	158708	AMB	DIABETIC	D		NC MEDIC	01/26/2010@08:30	5/12/2011
ARCH, SANDRA	176688	AMB	DIABETIC	D		NC MEDIC	03/31/2010@09:00	5/12/2011
ARMOUR, TRACI	116057	AMB	DIABETIC	D		NC MEDIC	01/27/2010@09:00	5/12/2011
ALCHESAY, CLIFTO	107649	AMB	GENERAL	D		NC MEDIC	01/13/2010@15:46	2/18/2010