

Introduction

The **A/R Ledger Document Repository (ARDR)** is a web-based application designed to retrieve and display permanently stored A/R Ledger documents. Utilizing the Document Management Server product that has been developed by Information Advantage Associates, the key features of **ARDR** include:

- Secure storage of A/R Ledger information in Excel spreadsheets by guarantor
- Use multiple criteria to search for guarantor files and display these results in a grid
- Record notes about a selected guarantor file
- Retrieve and view a selected guarantor file from the search results grid
- Automatic audit trail created each time a user requests access to a guarantor file.
- Review notes and history on-line within the search results grid
- Add and assign security rights for unlimited users

Data Conversion

The first step in utilizing the power of the ARDR system is to convert A/R ledger information from an existing application. Conversion routines have been written to extract A/R ledger information from version 4.5 of McKesson's clinic information system.

A/R ledger information is extracted into one or more print image files. Processing routines then load this information from all files, convert it to database elements, and then combine the data into a single Excel spreadsheet file for each guarantor. As this conversion process is underway, keyword values for each guarantor file are captured and loaded into **ARDR**. Keyword values include:

- Guarantor number.
- Guarantor name.
- Patient number.

If available, the patient name can also be loaded as a keyword value. If there are different customer or reporting entities (such as general clinics and psych units), this keyword value can also be recorded.

Functionality Review

There are two major components to the ARDR application: The Search Screen and the Guarantor File Retrieval.

Search Screen

The Search Screen allows the user to search for guarantor files based on the following keyword criteria:

- Guarantor number
- Guarantor name
- Patient number

Either the guarantor number, guarantor name, or patient number is required for all searches. If a customer or reporting entity keyword has been identified (such as general clinics or psych units), then a value for that keyword must be selected before the search begins. If partial values are entered then all matching records will be retrieved.

AR Ledger Document Repository

Search Upload Reports Administration Logout Information Advantage Assoc

Search Control Management

Search Criteria

Customer Number : 992222 Guarantor Number :
 Patient Number : Guarantor Name : smith, do

Result Displaying 3 Document(s) of 3. Search Clear

View	Description
	XX14-4 SMITH, DONNA J
	XX275-1 SMITH, DONNA L
	XX278-5 SMITH, DONALD A

Details Edit

Summary Keywords Notes History Hierarchy

Keyword	KeywordValue
Customer Number	992222
Guarantor Name	SMITH, DONNA J
Guarantor Number	XX14-4

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Detail information for a selected line in the Results grid is displayed in the Details grid in the bottom section of the screen. Tabs in the Detail grid display information about keyword values, notes, and history of the selected record.

Keywords Tab

Displays all keywords associated with the currently selected row from the Results Grid.

Keyword	KeywordValue
Customer Number	992222
Guarantor Name	SMITH, DONNA J
Guarantor Number	XX14-4

Notes Tab

Displays all notes that have been recorded for the currently selected row from the Results Grid.

Date	User	Comment
4/4/2006 1:30:00 PM	Information Advantage Assoc	Received call from F Davis about charge discrepan

History Tab

Displays audit trail of activity associated with the currently selected row from the Results Grid.

Action	User	Date/Time
Document previewed	Information Advantage Assoc	4/7/2006 10:03:00 AM
Notes added	Information Advantage Assoc	4/4/2006 1:30:00 PM

Guarantor File Retrieval

The “View” column in the Results grid of the Search Screen allows the user to select a specific guarantor file to be retrieved. Upon selecting the “View” icon, **ARDR** locates the appropriate file, makes a copy of the original and places it in a temporary location, and then opens the file in Excel.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1	Guar #	Guarantor Name	LT	Seq	Entry Date	Batch #	FC	AGC	L	Proc Dt	Patient #	Patient Name	Phys	Dept	Units	Type	D Code M	Proc Code M	Description	ST	IT1	Chg	GIGM Line Info		
2	XX11-4	SMITH, DONNA J	GT	1	03/15/99	2236	SP	V/S72	72	03/08/99	XX-554-3	DONNA	400	PS		V719	98889		CANCEL N/C	6		0.00			
3	XX11-4	SMITH, DONNA J	GT	2	03/15/99	6239	SP	JE72	13	03/10/99	XX-554-3	DONNA	400	PS		29844	98222		ADMIT LEVEL II	5		163.00			
4	XX11-4	SMITH, DONNA J	GT	3	03/16/99	2237	SP	V/S72	72	03/09/99	XX-554-3	DONNA	400	PS		V719	98886		NO SHOW CHG	6		36.00			
5	XX11-4	SMITH, DONNA J	GT	4	03/16/99	2201	SP	V/S72	13	03/11/99	XX-554-3	DONNA	400	PS		29844	98232		DAILY VISIT LEVEL II	6		77.00			
6	XX11-4	SMITH, DONNA J	GP	7	03/23/99	2551	SP	JE72	10	03/23/99		NO MISC NAME	200	PS				PDCHECK		CHECK PAYMENT	18		-163.00		
7	XX11-4	SMITH, DONNA J	GM	8																				CK#2235#NO YOUNG	
8	XX11-4	SMITH, DONNA J	GP	9	03/23/99	2551	SP	V/S72	10	03/23/99		NO MISC NAME	400	PS				PDCHECK		CHECK PAYMENT	20		-112.00		
9	XX11-4	SMITH, DONNA J	GM	10																				CK#2235#NO YOUNG	
10	XX11-4	SMITH, DONNA J	GT	11	03/31/99	2200	SP	V/S72	72	03/29/99	XX-554-3	DONNA	400	PS		29844	90862		MEDICATION MGMT	20		74.00			
11	XX11-4	SMITH, DONNA J	GP	12	03/31/99	2200	SP	V/S72	72	03/29/99	XX-554-3	DONNA	400	PS				PDCHECK		CHECK PAYMENT	20		-74.00		
12	XX11-4	SMITH, DONNA J	GM	13																				CK #224-3	
13	XX11-4	SMITH, DONNA J	GT	14	04/15/99	6201	SP	BA72	72	04/14/99	XX-554-3	DONNA	002	PS		29570	390804		PSYCHOTHERAPY	17		49.00			
14	XX11-4	SMITH, DONNA J	GP	15	04/15/99	2201	SP	KA72	72	04/14/99	XX-554-3	DONNA	003	PS				PDCHECK		CHECK PAYMENT	19		-76.00		
15	XX11-4	SMITH, DONNA J	GM	16																				#6186	
16	XX11-4	SMITH, DONNA J	GT	21	04/27/99	6205	SP	V/S72	72	04/12/99	XX-554-3	DONNA	400	PS		29854	90862		MEDICATION MGMT	30		74.00			
17	XX11-4	SMITH, DONNA J	GP	22	04/27/99	2205	SP	V/S72	72	04/19/99	XX-554-3	DONNA	400	PS				PDCHECK		CHECK PAYMENT	30		-74.00		
18	XX11-4	SMITH, DONNA J	GM	23																				#6175	
19	XX11-4	SMITH, DONNA J	GT	24	05/07/99	2237	SP	BA72	72	05/05/99	XX-554-3	DONNA	002	PS		29880	390806		PSYCHOTHERAPY	28		76.00			
20	XX11-4	SMITH, DONNA J	GP	25	05/07/99	2237	SP	BA72	72	05/05/99	XX-554-3	DONNA	002	PS				PDCHECK		CHECK PAYMENT	27		-49.00		
21	XX11-4	SMITH, DONNA J	GM	26																					
22	XX11-4	SMITH, DONNA J	GT	31	05/20/99	2237	SP	VE72	72	05/12/99	XX-554-3	DONNA	400	PS		29854	90862		MEDICATION MGMT	30		74.00			
23	XX11-4	SMITH, DONNA J	GP	32	05/20/99	2237	SP	VE72	72	05/25/99		DONNA	300	PS				PDCHECK		CHECK PAYMENT	30		-74.00		
24	XX11-4	SMITH, DONNA J	GM	33																					
25	XX11-4	SMITH, DONNA J	GT	38	06/20/99	2236	SP	BA72	72	06/21/99															
26	XX11-4	SMITH, DONNA J	GP	39	06/20/99	2236	SP	BA72	72	06/21/99															
27	XX11-4	SMITH, DONNA J	GM	40																					
28	XX11-4	SMITH, DONNA J	GM	41																					

The retrieved copy of the guarantor file can be sorted or manipulated using standard Excel functionality. Because this is only a copy, the original document is never changed.

Technical Considerations

The user interface for **ARDR** has been developed using Microsoft's ASP.Net development toolset. Data for the application is stored in a Microsoft SQL Server relational database. If desired, the application can be configured to use other relational databases such as Microsoft Access, MySQL, or Oracle.

The Excel spreadsheet files are stored in one or more folders on servers that are accessible by the application. Rights to these folders can be restricted to only the application so that once a document has been loaded into **ARDR** it can never be altered.

Like the entire suite of our healthcare products, **ARDR** is easy to learn, easy to manage, and priced to accommodate our client's budgetary requirements. All of our products provide flexible, scalable solutions that can be easily and quickly adapted to keep up with the constantly changing healthcare regulatory environment.

About Us

Information Advantage Associates is a Houston, Texas-based consulting firm that has been providing business solutions to clients since 1989. Other products in our healthcare portfolio include:

- EOB Generator – HCFA 1500 and UB92
- Denial Reporting – HCFA 1500 and UB92
- Supplemental Billing – HCFA 1500 and UB92
- Document Management
- Refund Tracking
- All Payor Log
- Rotation Tracking

For more information about this or any of our other products do not hesitate to contact:

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