

Desk Review Reports In the PIA System

February 2024

Integrity

Collaboration

Quality

Effectiveness

Content

- ▶ What is the Desk Review Detail Report?
- ▶ How to run the report to complete monthly invoices.
- ▶ Using the desk review reports to monitor desk review activity.
- ▶ FAQs

What is the Desk Review Detail Report?

- ▶ When exported and filtered, this report will show the total number of desk reviews for a specific date range.
- ▶ It includes desk review details such as the requested date, due date, completed/withdrawn date, and the status (Submitted, In Progress, MDR Completed, MDR Requested, Withdrawn).
- ▶ Those with the supervisor role in PIA should use the report to obtain the number of desk reviews completed for their monthly invoice to Aging Well and to monitor their organization's desk review activity.

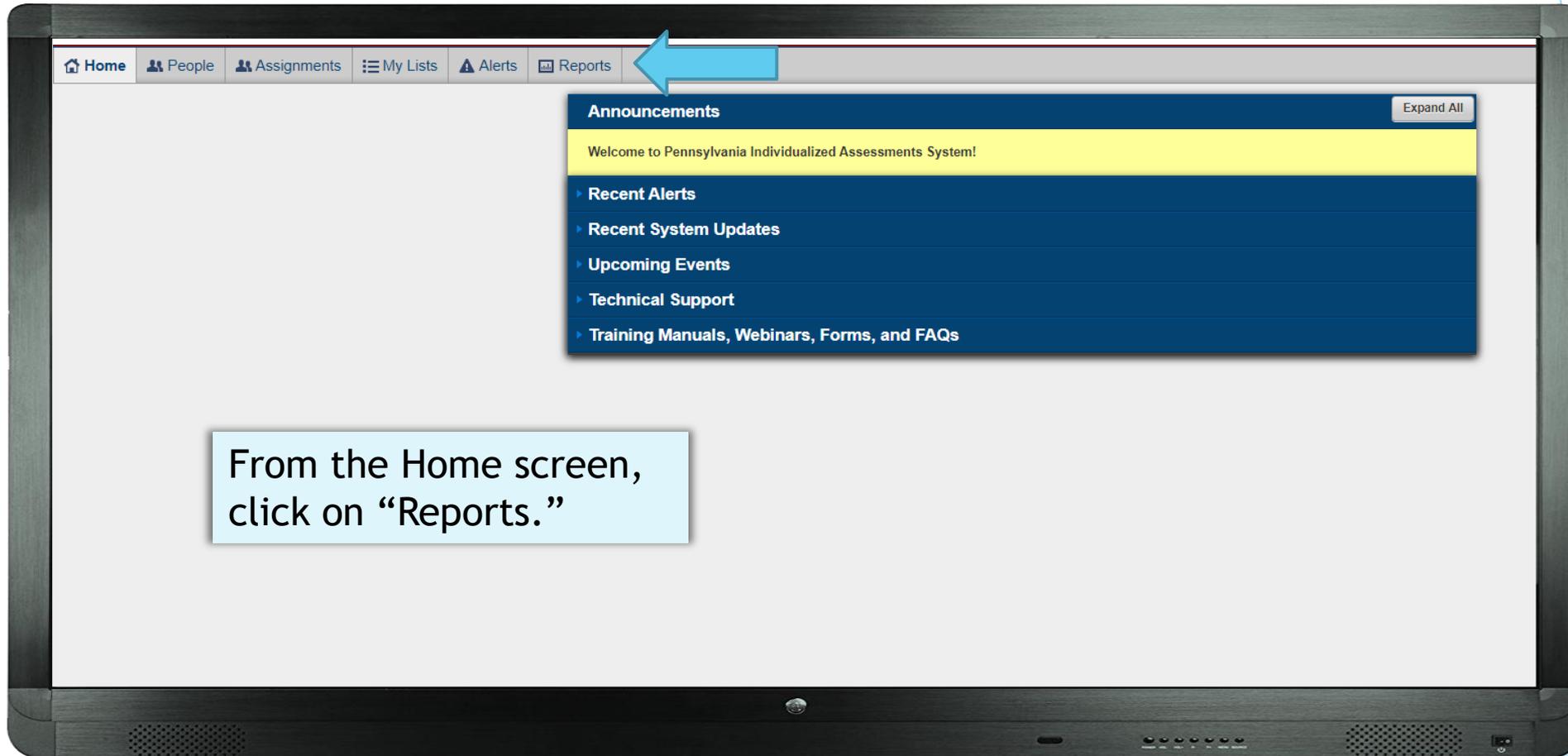
Integrity

Collaboration

Quality

Effectiveness

How to Run the Desk Review Detail Report for Monthly Invoices



Integrity

Collaboration

Quality

Effectiveness

Category:*

Filter

This opens the list of reports, including the Desk Review Detail Report. Click on "View" for this report.

Category	Name	
Account Activity	User Account Updates Detail Report	View
Account Activity	User Account Updates Summary Report	View
Desk Review	Desk Review Detail Report	View
Desk Review	Desk Review Summary Report	View
FED and PASRR Assessment	FED and PASRR Average Days Report	View
FED and PASRR Assessment	FED and PASRR Completion Detail Report	View
FED and PASRR Assessment	FED and PASRR Completion Summary Report	View
FED Assessment	Applicant Applied or FED Completion Detail Report	View
FED Assessment	Applicant Applied Or FED Completion Summary Report	View
FED Assessment	FED Excuse Detail Report	View
FED Assessment	FED Excuse Summary Report	View
PASRR Assessment	PASRR Excuse Detail Report	View
PASRR Assessment	PASRR Excuse Summary Report	View
Redetermination and Desk Review	Annual Redeterminations and Desk Review Detail Report	View
Redetermination and Desk Review	Annual Redeterminations and Desk Review Summary Report	View

Integrity

Collaboration

Quality

Effectiveness

Start Date

11/1/2023

End Date

1/31/2024

Organization Unit

Your AAA

View Report

Desk Review Report (Detail)

You are now on the report viewer screen. **Make sure to backdate the Start Date** by a few months, enter the End Date, and then click on “View Report.”

For example: If you are doing your invoice for January 2024, then use the dates 11/1/2023 to 1/31/2024.

Integrity

Collaboration

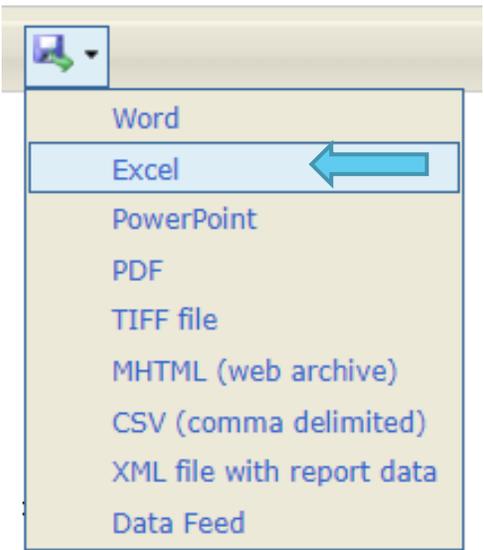
Quality

Effectiveness

Start Date Organization Unit

End Date

1 of 47



From the Export Drop Down Menu, Select Excel to export the report into an Excel Spreadsheet.

Detailed instructions for downloading reports into Excel and other formats are available on the Aging Well website, <https://agingwellpa.org> under AWP Resources for AAAs > PIA Resources > PIA Quick Reference Guides > Reports Quick Reference Guide.

Integrity

Collaboration

Quality

Effectiveness

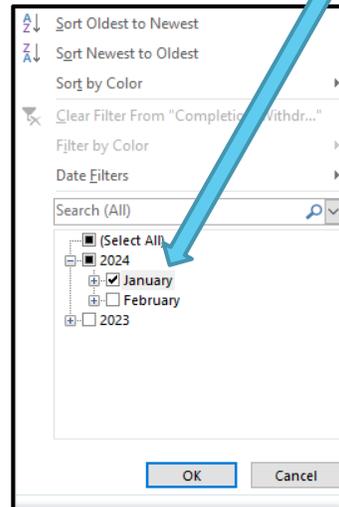
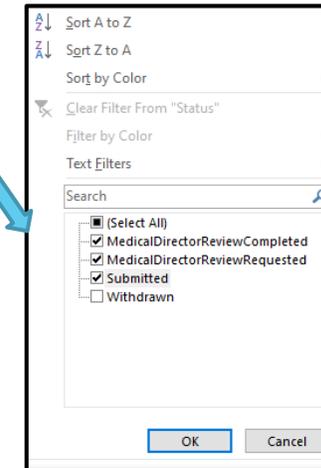
Open the Excel spreadsheet and filter the **Completion/Withdraw Date** and **Status** Columns as shown below.

Desk Review Report (Detail)

Total Count: 1972
 Search Criteria:
 Start Date: 11/1/2023
 End Date: 1/31/2024
 Organization Unit: Your AAA

Organization Unit	Assessors	Person ID	First Name	Last Name	Requested Date	Due Date	Completion/Withdraw Date	Status	Late?	Delay Reason	Comments
-------------------	-----------	-----------	------------	-----------	----------------	----------	--------------------------	--------	-------	--------------	----------

- Click the arrow on the **Completion/Withdraw Date** column and select January 2024. Click OK
- Click the arrow on the **Status** column, and select the boxes that state MDR Completed, MDR Requested, and Submitted. Exclude any desk reviews that were Withdrawn or are In-Progress. Click OK.

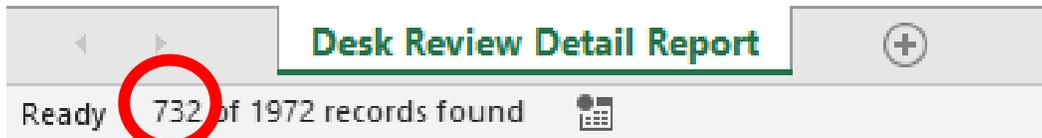
Integrity

Collaboration

Quality

Effectiveness

Now, look at the bottom left corner of your report to find the number of desk reviews to include on your invoice.



In this example, the number of desk reviews completed in January 2024 is 732.

Integrity

Collaboration

Quality

Effectiveness

You can monitor the status of your AAA's desk review activity (assessor, in progress, submitted, withdrawn, or late) by filtering each column on the Desk Review Detail Report.

Desk Review Report (Detail)

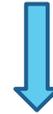
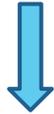
Total Count: 1972

Search Criteria:

Start Date: 11/1/2023

End Date: 1/31/2024

Organization Unit: Your AAA



Organization Unit	Assessors	Person ID	First Name	Last Name	Requested Date	Due Date	Completion/Withdraw Da	Status	Late?	Delay Reason	Comments
-------------------	-----------	-----------	------------	-----------	----------------	----------	------------------------	--------	-------	--------------	----------

Self-monitoring will provide you insight into issues that may be impacting your AAA's performance.

Questions you might ask are:

- Are there any desk reviews in progress that have not been fully submitted?
- If desk reviews are late, is there a trend that can be identified?
- Is there an IT or technical issue that needs to be addressed?
- Does your AAA need to train or hire additional staff?
- Can your QCSS assist you or your staff by providing additional guidance?

Integrity

Collaboration

Quality

Effectiveness

You can also self-monitor the status of your AAA's desk review activity (in progress, withdrawn, completed within 10 business days, or late) by running the Desk Review Summary Report. Clicking on the blue underlined number located under each column title will open the desk review details.

Start Date: Organization Unit:

End Date:

1 of 1

Date Executed: 2/22/2024 10:02:19 AM

Desk Review Report (Summary)

Total Count: 1

Search Criteria:

Start Date: 1/1/2024
 End Date: 1/31/2024
 Organization Unit: Your AAA

Organization Unit	Total	In Progress	Withdrawn	Completed in 10 business days	Late (Completed after 10 Business Days)
Total	589	0	1	587	2
Your AAA	589		1	587	2

*The Desk Review Summary Report should be used only for self-monitoring purposes, not for completing invoices.

Integrity

Collaboration

Quality

Effectiveness

Start Date  Organization Unit 

End Date 

14  of 14    

Date Executed: 2/22/2024 10:12:47 AM



Desk Review Report (Detail)

You can return to the summary report by clicking the blue arrow on the tool bar.

- Integrity
- Collaboration
- Quality
- Effectiveness

Desk Review Invoice FAQs



What is the payment for a desk review & how do we bill for it?

- ▶ The payment rate for a desk review is the same as your FED rate. You will generate a report in PIA to obtain the total number of desk reviews completed for your monthly invoice. Invoice totals will be reconciled with your QCSS.
- ▶ Desk reviews should be entered on the **Redetermination** line on your monthly invoice. (Contact your QCSS if you need a copy of the electronic invoice form)
- ▶ Invoices are due to Aging Well no later than the 5th business day of the month. Email invoices to fedbilling@agingwellpa.org, and copy your QCSS on the email.

Integrity

Collaboration

Quality

Effectiveness

Additional Information

- ▶ This presentation is available in a PDF format & posted on the Aging Well website.
- ▶ If you have additional questions or need assistance, please contact your Quality Compliance & Support Specialist.