

MSO KPI: Batch Overview Guide

No Protected Health Information (PHI) is contained in this document.

The Batch Overview sheet is found on the Sage MSO KPI Dashboard. It provides a set of key performance indicators (KPIs) based on the batches created during the billing process as well as high level measures per batch.

When Primary Sage Users submit claims via Fast Service Entry Submission, a batch is created containing all the claims created per submission. When Secondary Sage Users submit 837I/P files, a batch is created when the file is uploaded into Sage. Occasionally a batch may have issue, and when Finance attempts to process it, a secondary batch is created. In essence, there may be more batches in Sage than the number of Fast Service Entry Submissions or 837 files.

This sheet is intended to help providers and SAPC have an overview of the number and frequency of claim submissions by agency, and specified periods.

Batch Overview

To search by when batches were submitted: 1) clear all filters, 2) change Date Sort to Batch.Date Claims Received, 3) select Calendar Year and Calendar Year-Month filter.

Summary Statistics:

- Total # of Batches: 8
- Total 837P Batches: 0
- Total MSO/PCNX Batches: 8
- Total 837I Batches: 0
- Procedure Count: 10
- Total Charges: \$1,428.73
- Total Disbursed: \$108.88
- MSO Procedure Count: 10
- 837P Procedure Count: 0
- 837I Procedure Count: 0

Batch History Table:

Batch ID	Batch Date Claims Received	Procedure Count	Client Count	Earliest DOS	Latest DOS
Totals		10	3	2023-07-01	2026-01-14
536278	2026-02-27	1	1	2026-01-14	2026-01-14
378762	2025-03-11	1	1	2025-03-04	2025-02-04
371436	2025-03-04	2	2	2025-03-04	2025-03-04
190681	2024-01-25	1	1	2023-08-08	2023-08-08
158372	2023-10-30	1	1	2023-10-30	2023-10-30
145937	2023-09-28	2	2	2023-07-01	2023-07-01

OBJECTS

Common Selector

As with other sheets, the standard common selector panel is on the right-hand side for quick filtering options.

The image shows a vertical sidebar of filters. At the top are text input fields for 'Provider Name', 'Performing Provider Name', 'Procedure', and 'Contracting Provider Pro...'. Below these are dropdown menus for 'Authorization Status' and 'Authorization Type'. A section titled 'General' contains dropdowns for 'Client' and 'Calendar'. Another section titled 'Fiscal' contains a dropdown for 'Fiscal'. At the bottom is a 'Date Sort' section with a dropdown menu currently set to 'Procedures.Date O...'. Below the sidebar, the text 'Procedures.Date Of Service' is displayed in red, followed by the date range '2023-07-01 to 2026-03-20'.

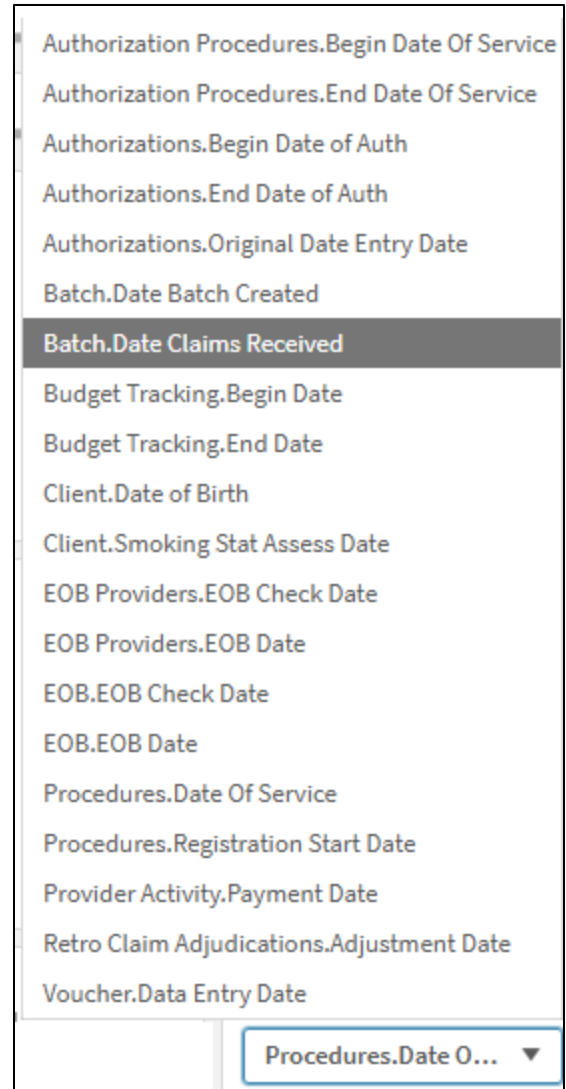
Instructions

Sage MSO KPI Dashboard's default Date Sort, found at the bottom of the Common Selector, is Procedures.Date Of Service. When filtering by any "Fiscal Year" option this hard codes KPI to search for only items with services within the selected fiscal year(s).

As billing may be delayed and cross fiscal years, such as billing June services in the following fiscal year or replacement of State denied services which may also occur in the following fiscal year, analysis on batches may require looking at when batches are received irrespective of the dates of service within the batch. For this analysis, the following steps should be followed:

To search by when batches were submitted: 1) clear all filters, 2) change Date Sort to Batch.Date Claims Received, 3) select Calendar Year and Calendar Year-Month filter.

- 1) Clear all filters
- 2) Change the Date Sort to Batch.Date Claims Received
- 3) Select Calendar Year filter(s) based on analysis.



Filters

In addition to the Common Selector pane, filters were added to the main body of the sheet for targeted access.

Fiscal Year	Fiscal Year-Month
Calendar Year	Calendar Year-Month

Batch Origin
837I
837P
MSO

Filter	Description
Fiscal Year	<p>The year notes the ending year in a fiscal year range.</p> <ul style="list-style-type: none"> FY2026 = FY 25-26 FY2025 = FY 24-25 <p>This selection pulls batches with claims within the selected fiscal year(s).</p>
Fiscal Year-Month	<p>This is a combination of the fiscal year and month for more targeted drill down.</p>
Calendar Year	<p>If using this filter, ensure the Date Sort is set to Batch.Date Claims Received.</p>
Calendar Year-Month	<p>If using this filter, ensure the Date Sort is set to Batch.Date Claims Received.</p>
Batch Origin	<p>This is the method by which claims are submitted to SAPC.</p> <p>Values:</p> <ul style="list-style-type: none"> 837I 837P MSO <p>Primary Sage Users =MSO Secondary Sage Users =837I and/or 837P</p>

Last 15 Batch Dates

This object provides a quick account of how many batches were created for the user’s agency per day within the last 15 days. If no batch was created in one or more of the last 15 days then there will be a dash next to the date. If no batches were submitted at all within the last 15 days the object will be blank.

🔍 Last 15 Batch Dates

2026-04-28	-
2026-04-27	-
2026-04-26	-
2026-04-25	-
2026-04-24	-
2026-04-23	-

Column	Description
1 st Column	Date the batch was received in Sage.
2 nd Column	The number of services within the batch

Batch History

Batch History

Batch ID 🔍	Batch Date Claims Received 🔍	☰ Procedure Count	☰ Client Count	☰ Earliest DOS	☰ Latest DOS
Totals		10	3	2023-07-01	2026-01-14
536278	2026-02-27	1	1	2026-01-14	2026-01-14
378762	2025-03-11	1	1	2025-03-04	2025-03-04
371436	2025-03-04	2	2	2025-03-04	2025-03-04

Column	Description
Batch ID	Batch ID number.
Batch Date Claims Received	Date the batch was received in Sage.
Procedure Count	The number of services within the batch.

Client Count	The number of clients billed within a batch.
Earliest DOS	The earliest date of service (DOS) in the batch.
Latest DOS	The latest date of service (DOS) in the batch.

KPI Objects

As sheets are viewed by both SAPC and providers alike, this sheet may contain blank KPIs which may not apply to the user’s agency. The KPIs are divided by how claims are submitted, MSO/PCNX or an 837 file. Unless a provider transitioned from a Primary Sage User to a Secondary Sage user within KPI Dashboards’ rolling history period, only some of the objects listed below will populate with data other than “0.”

Total # of Batches 8	Total 837P Batches 0
Total MSO/PCNX Batches 8	Total 837I Batches 0

Procedure Count 10	Total Charges \$1,428.73	Total Disbursed \$108.88
MSO Procedure Count 10	837P Procedure Count 0	837I Procedure Count 0

KPI	Description
Total # of Batches	Total count of batches based on filtered selections.

Total 837P Batches	Total number of batches created for claims received via 837P files for the selected period. Applies to Secondary Sage Users only.
Total 837I Batches	Total number of batches created for 3.7WM or 4.0WM claims received via 837I files for the selected period. Applies to Secondary Sage Users only.
Total MSO/PCNX Batches	Total number of batches created when billing directly through Sage for the selected period. Applies to Primary Sage Users only.
Procedure Count	<p>The total number of billed services based on filtered selections.</p> <p>For Primary Sage Users this will match the MSO Procedure Count KPI.</p> <p>For Secondary Sage Users who do not offer 3.7WM or 4.0WM this will match the 837P Procedure Count KPI.</p> <p>For Secondary Sage Users who offer both Professional and Institutional services this is a combined total of 837P and 837I procedures.</p>
Total Charges	The total dollar amount billed to SAPC based on filtered selections.
Total Disbursed	The total dollar amount disbursed based on filtered selections.
MSO Procedure Count	The total number of services billed through Sage based on filtered selections.
837P Procedure Count	The total number of services billed via 837P based on filtered selections.
837I Procedure Count	The total number of services billed via 837I based on filtered selections.