

DATA REPORTING IN BUSINESS OBJECTS FOR CMS KIDS USERS

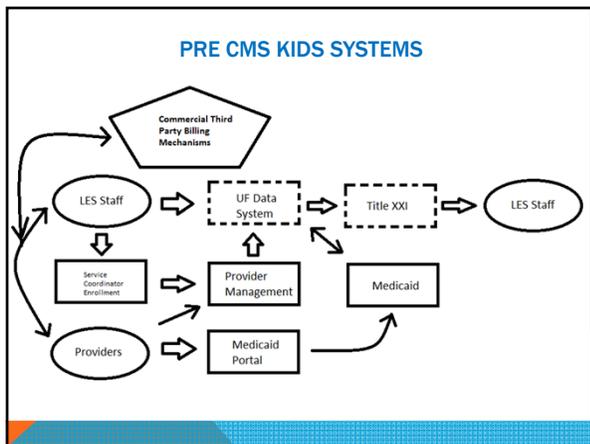
PRESENTED BY:
SALLY GOLDEN MCCORD
AND DAVID JOHNSON

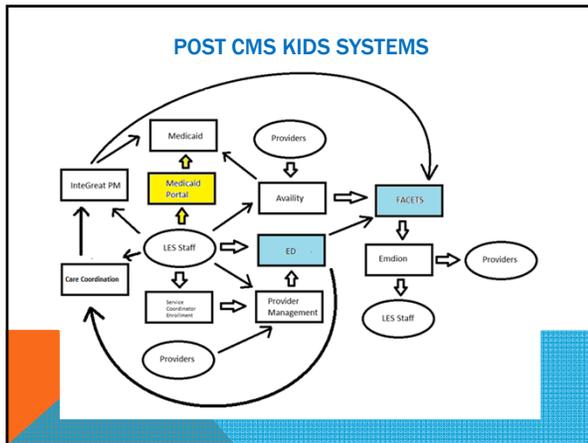
OVERVIEW AND PURPOSE

The purpose of this presentation is to explore the capabilities of Business Objects (BO). It will explain:

- Basic parameters of a report
- Query Creation
- Content Selection
- Data Field inclusion
- Creation of Folders in Favorites
- Report Usage in normal business

Advanced report features (Slide titles marked in RED) will be briefly introduced to show the capabilities of the reporting environment but covered at another time.



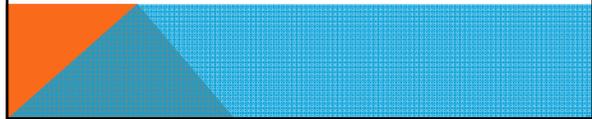


- ### WHERE IS DATA ENTERED?
- Enrollment Records -> Search Screen (View History)
 - FSPSA data entry -> Form G
 - Intervention Data Entry -> Practice Management, and Care Coordination
 - eIFSP -> ED

- ### WHERE DID MY REPORT GO?
- Reports- Child Count -> Child Enrollment Report MMBR3060
 - Reports - FSPSAs -> Service Authorization Report MMBR3060
 - Reports- Fiscal/Billing for Provider Services -> Claims Detail Report CLCL1340
 - Providers -> Provider Directory PRVN1010 / Provider List PRVN1000

WHERE ARE MY SERVICE COORDINATOR REPORTS?

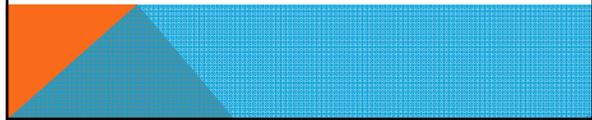
- Demographic Report (ES49) -> Service Coordinator Open Caseload MMBR2030
- Case Management Activity Report (ES50) -> Child Enrollment Report MMBR3060
- Due Date/Calendar Report (ES51) -> IFSP Tickler Report MMBR2010, LEA/SEA Notification Report MMBR1730
- SC Reports - Supervisor Report (ES52) -> Service Coordinator Caseload Report MMBR1490 is the closest match
- SC Reports - Supervisor Fix It Report (ES53) -> Aging Out Report MMBR1050, Missing Referral Date Report EROR1000, Missing Service Coordinator Report MMBR2000, Form I Clean-Up Report, Missing Brochure Date Correction Report MMBR1730B, OSEP and EXIT Data Cleanup reports



REPORT CREATION AND BAKING ARE VERY SIMILAR.

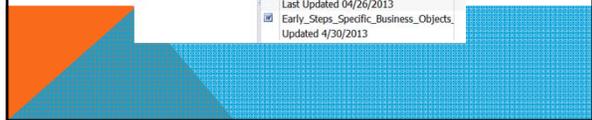
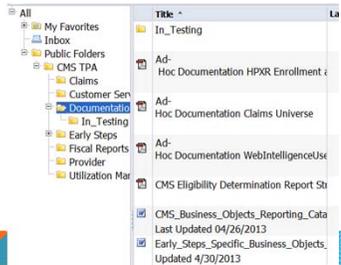
"To Die For Muffins" - "To Audit Billing and Maximize Funds"

- Ingredients - Documentation
- Directions - Data Dictionary
- Preheat Oven - Setup View and Create New Report (Web Intelligence Document)
- Combine - Add Universe
- Mix - Add Data Elements
- Fold - "What You See Is What You Get" (WYSIWYG) query and Advanced Queries
- Fill muffin cup - Run the Report (Query)
- Sprinkle - Add Report Elements and Titles and Save
- Bake - Run The Report again or Schedule
- Cool - Organize Your Report
- Enjoy - Save Your Report



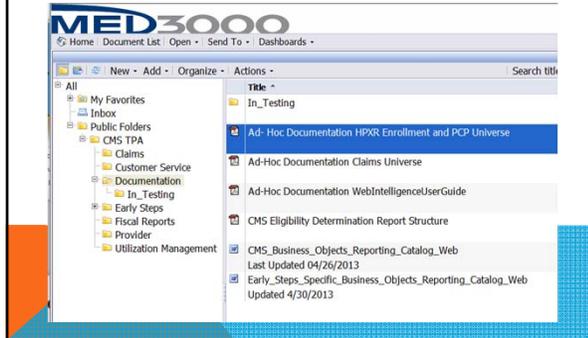
DOCUMENTATION

In Business Objects there is a folder containing report tool documentation:



DATA DICTIONARY

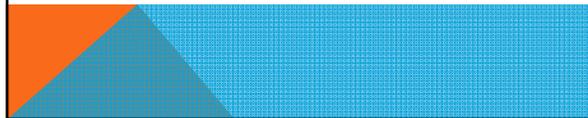
Database field level descriptions are in the highlighted pdf file below:



DATA DICTIONARY: LIST OF ELEMENTS

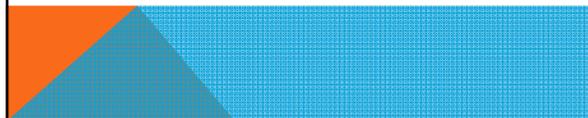
Member Demographics
Member Full Name, First, Last
Member Last, First Name
Member Last Name
Member First Name
Member Middle Initial
Member Short Name
Member Title
Member Master Index
Member Social Security Number
Original Member ID
Subscriber ID

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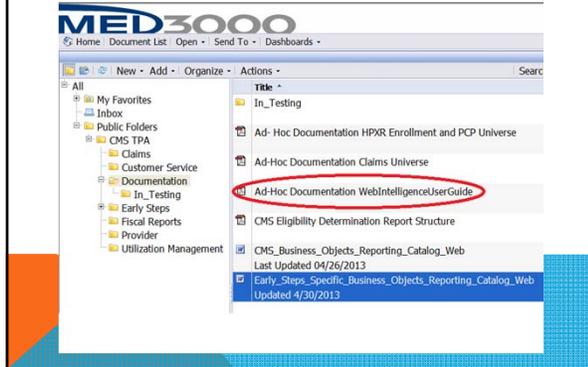


DATA DICTIONARY: DESCRIPTION OF FIELDS

Object: **Member Last, First Name**
Type: Character
Description: The member name in the format Last Name, First Name Middle Initial
Select equivalent: tpxcr:hpccadmin:MEMBER_D01K:LAST_FIRST_NAME
Where equivalent:
Qualification: dimension
List of values: D07, editable, manual refresh, not exportable
Security access level: 0
Can be used: in result, in condition, in sort
Object status: show

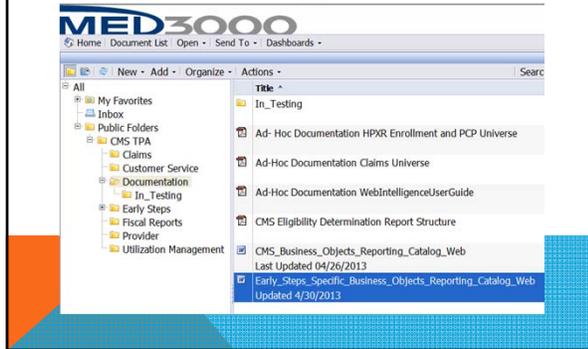


**DOCUMENTATION – 566 PAGE MANUAL ON
HOW TO USE BUSINESS OBJECTS...**



DOCUMENTATION

Early Steps Reports are described in the highlighted word document below:



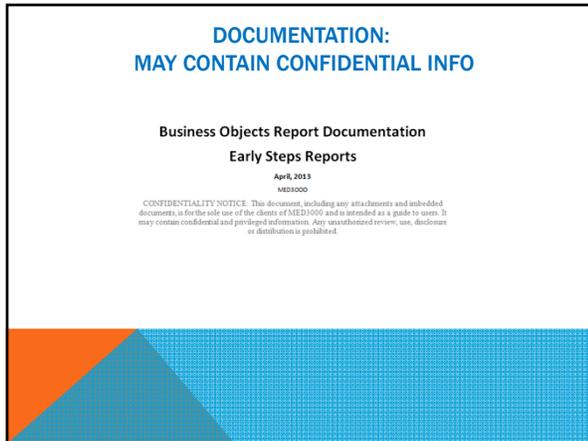
**DOCUMENTATION:
MAY CONTAIN CONFIDENTIAL INFO**

Business Objects Report Documentation

Early Steps Reports

April, 2013
MED3000

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DOCUMENTATION: TABLE OF CONTENTS

Reporting in Business Objects: Table of Contents

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Introduction	4
Admin	5
11 Claims Detail Report	5
12 Disposition Report	8
13 Family Directory	11
14 Form G Rejection Report	14
15 Initial IFSP Part Due Report	18
16 Natural Environment Determination Report	20
17 Service Authorization Report	25
18 Service Authorization with Unassigned Provider	30
Contract Deliverables	33
19 Authorizations InBated in Period	33

DOCUMENTATION: REPORT DESCRIPTION

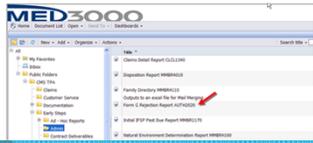
1.4 Form G Rejection Report

Report Name: Form G Rejection Report AUTH2020

Purpose: This report shows a listing of PSPAs that had errors which prevented them from loading into Paicis.

Location: CMS TPA -> Early Steps -> Admin

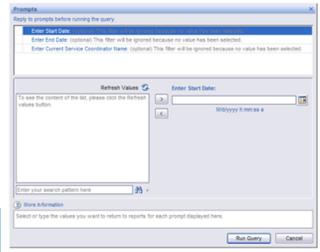
Where to Find Report:

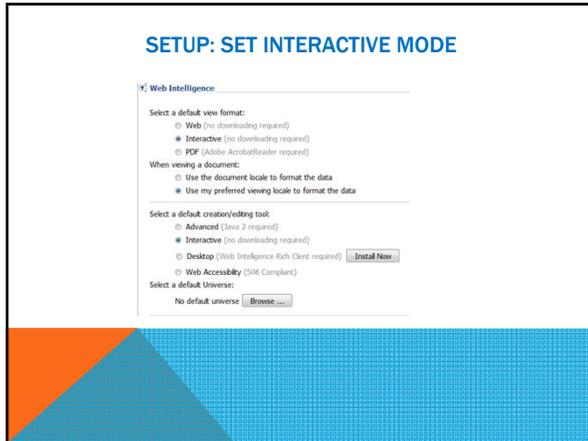


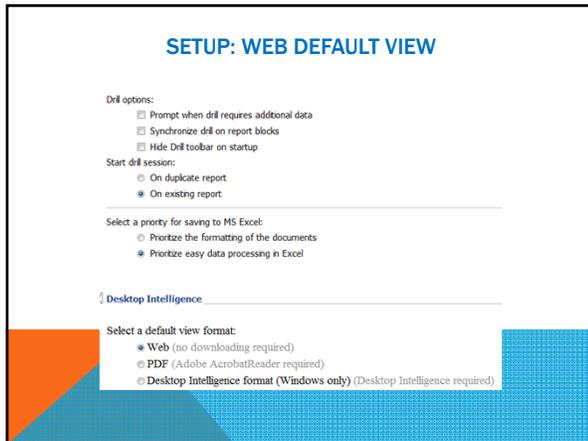
DOCUMENTATION: REPORT RUN PARAMETERS

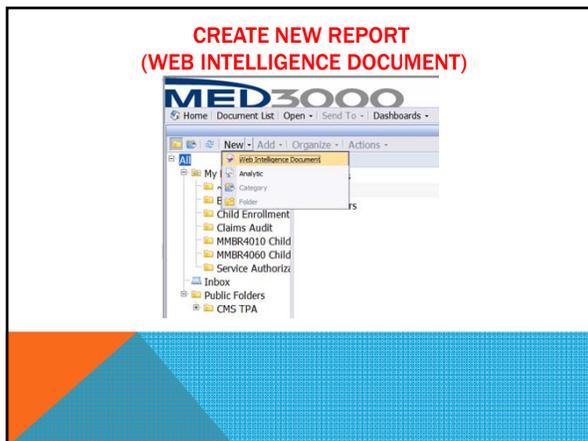
Parameters:

- Required Parameters: Disposition Date From, Disposition Date To
- Optional Parameters: Office Name



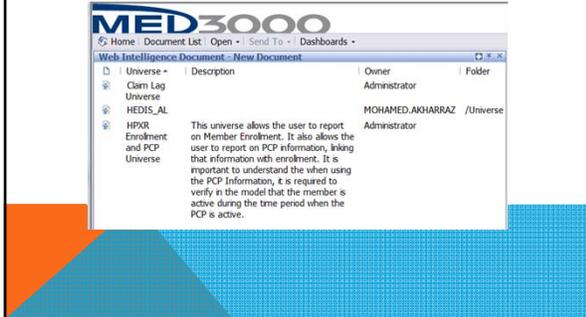






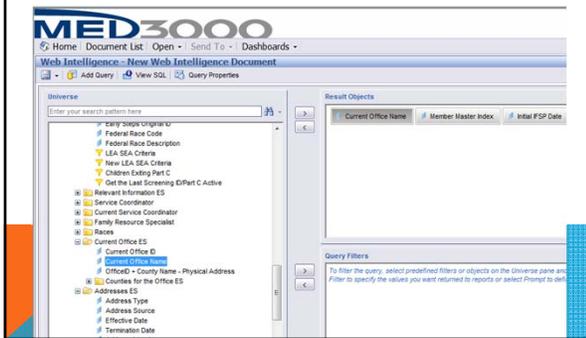
ADD UNIVERSE

Select HPXR Enrollment and PCP Universe.



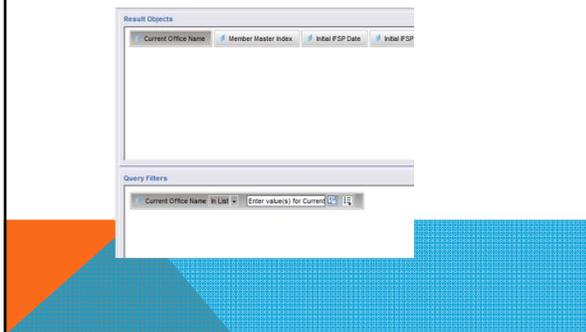
ADD DATA ELEMENTS

Drag and drop data elements from the Universe to the Result Objects window.



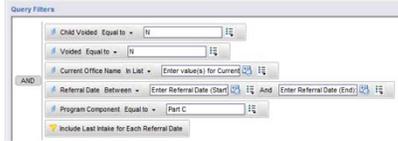
WYSIWYG QUERY

Drag and drop fields from the Result Objects or Universe to the Query Filters.



COMPLEX QUERIES PART 1

To ensure you don't get back voided records you will want to exclude as shown below the "Child Voided Equal to N" and the "Voided Equal to N" records. In addition, you will want to specify the "Current Office" to avoid transferred records from a prior LES. You will also note that special calculations can be done such as "Include Last Intake for Each Referral Date"



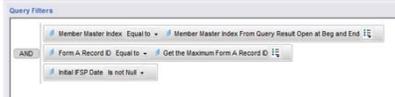
COMPLEX QUERIES PART 2

In order to make a report faster, you can break it up into smaller queries by the "data set" such as Form A information.



COMPLEX QUERIES PART 3

You can tie the results of each sub query to the main report query through a key like the Member Master Index. You can also limit the results of data in tables such as on the Form A where there is an option to only return the Maximum Form A Record ID.



ADVANCED REPORT FEATURES

You can format a report and save a report with the formatting changes (or export to Excel and manipulate it there). There are many formatting options available within BO.



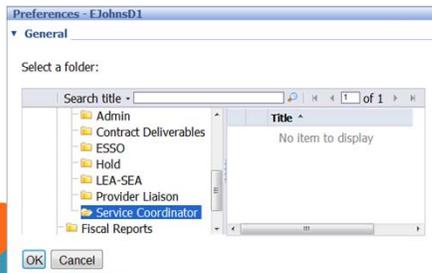
CREATION OF FOLDERS (YOUR FAVORITES)

I would suggest adding different categories that make sense to you as the BO user.



REPORT USAGE IN NORMAL BUSINESS

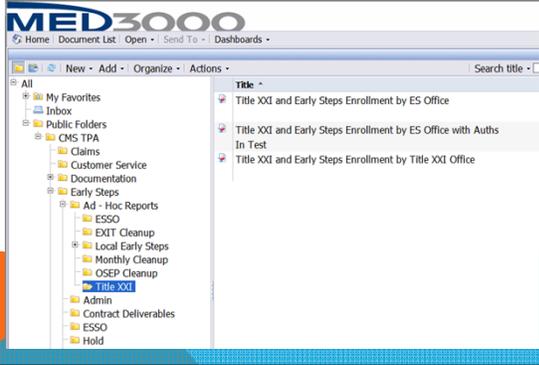
Set your default to a folder in your Preferences. For instance, Service Coordinators might set their folder so they see their reports as their "home page" at the start of BO.



COOL DOWN - REPORTS YOU NEED TO USE



TITLE XXI AND EARLY STEPS ENROLLMENT BY ES OFFICE



FORM G REJECTION REPORT AUTH2020

