



Claims Reports for Providers

Agenda:

- Walk through of the PowerPoint presentation
- Live Environment Demonstration
- Question Session for presenter and various Claims SME's that will be standing by



Claims Reports for Providers

Presenter: Michael Berry

Summary:

This presentation will provide a detailed approach to running Claims reports in the Business Objects environment.



Claims Reports for Providers

Presentation Assumptions:

1. The presenter is a subject matter expert in the Business Objects reporting environment, and will focus this presentation on how to use the Business Objects reporting tools. SME's from Claims will also be available to address questions.
2. Some recent challenges with the upgraded environment were due to LAN infrastructure equipment problems. Those issues have been resolved and addressed by LAN/WAN technicians. The presenter cannot address LAN/WAN hardware issues during this presentation.
3. Improving the speed of interacting with the reporting environment will always present new challenges due the huge variety of Provider computers that are supported. There are teams who monitor the timeliness of the environment everyday. These teams make every effort to get the environment faster and faster.

Getting Started

ILLINOIS
MENTAL HEALTH COLLABORATIVE
FOR ACCESS AND CHOICE

About Services News Contact

for providers

Provider Online Services

Log in to Provider Connect.
Your account name will determine your access to records that are specific to you.
Click the reports link, and wait for the environment to load (several seconds).

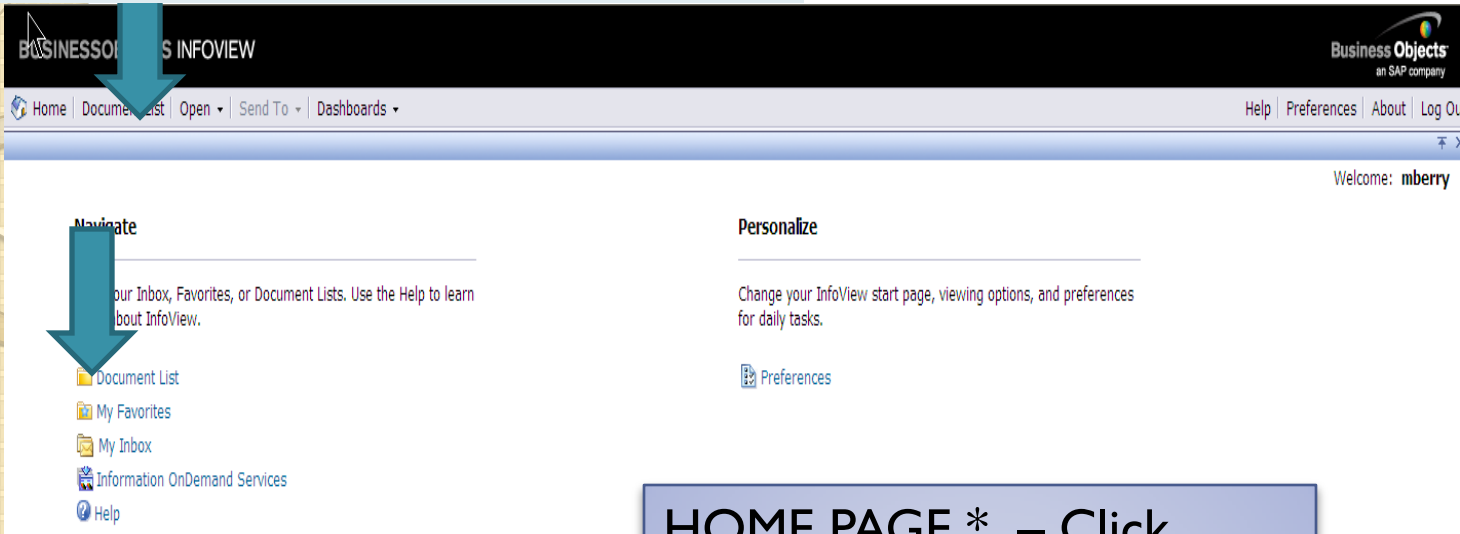
Home
Provider Home
Provider Manual

online
claims
our
izations
, secure

LOG IN
REGISTER
DEMO

developed specifically for you, which
include ProviderConnect, the Provider Manual, and links to mental health
resources.

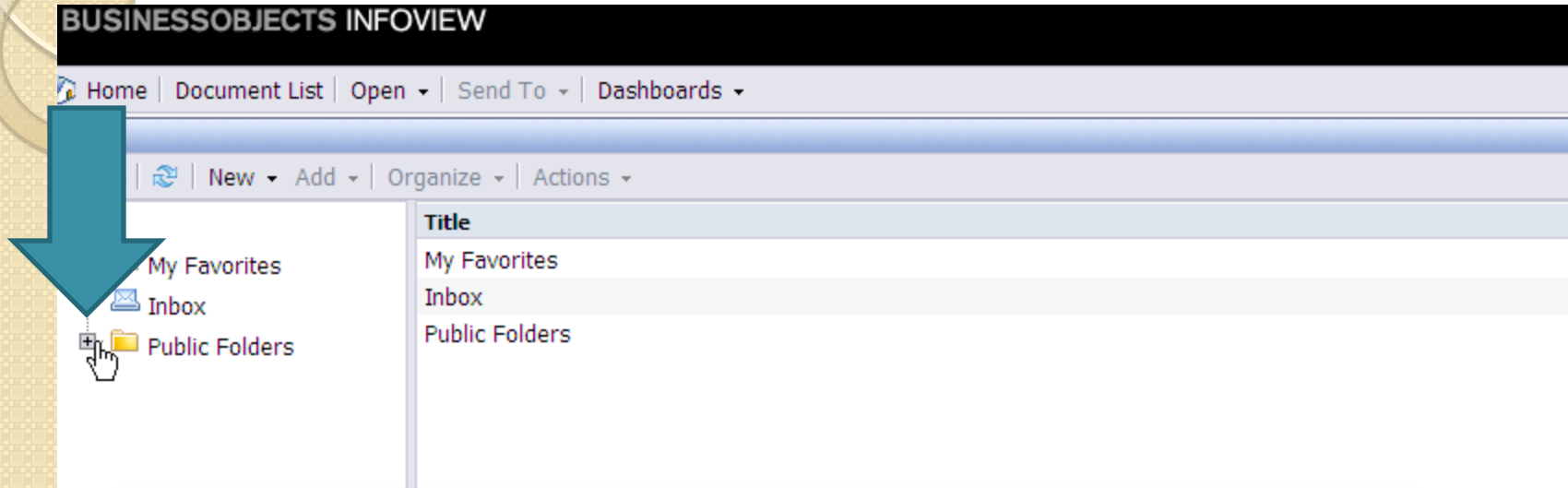
Environment Home Page



HOME PAGE * – Click “Document List” for your reports.

* For more information about features of this environment, please refer to the Infoview User Manual.

Getting to your Reports: Public Folders










Expand the Public Folders by click the + button next to Public Folders.

Or, Just click Public Folders.

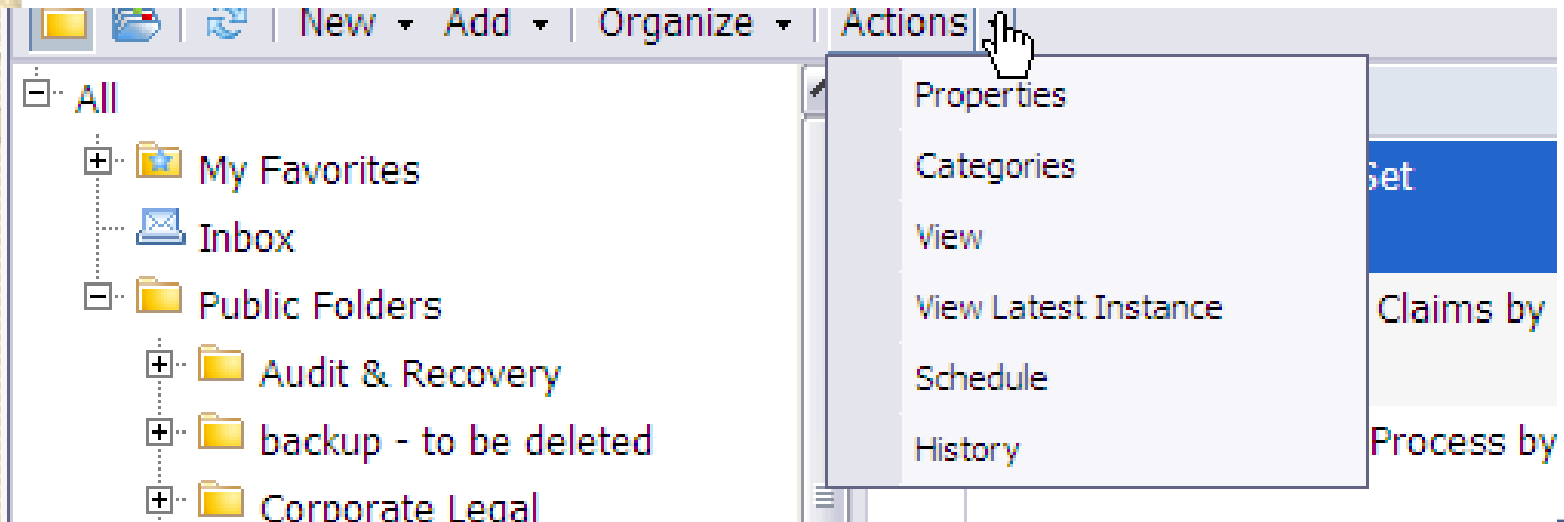
The Document List

New ▾ Add ▾ Organize ▾ Actions ▾ Search title 1 of 1

Title ^	Last Run	Type	Owner	Instances
 IL Claims Detail Data Set	May 29, 2009 10:35 AM	Crystal Report	jmartin	103
 IL Report of Approved Claims by Submission Date	May 29, 2009 9:19 AM	Crystal Report	jmartin	103
 IL Report of Claims in Process by Submission Date	May 29, 2009 9:19 AM	Crystal Report	jmartin	102
 IL Report of Denied Claim Lines by Submission Date	May 26, 2009 2:52 PM	Crystal Report	jmartin	100
 IL Report of Denied Claim Lines by Submission Date - Consumer Name	May 26, 2009 3:41 PM	Crystal Report	jmartin	101
 IL Report of Denied Claim Lines by Submission Date - Fund Source	May 8, 2009 9:05 AM	Crystal Report	jmartin	36
 IL Report of EDI-837P Batch Claims Submitted by Submitter ID	May 15, 2009 11:18 AM	Crystal Report	jmartin	24

You should see a list of reports to interact with. Note the “Last Run” Column. One way to see the last instance, is to double click the report name.

Different Command Options

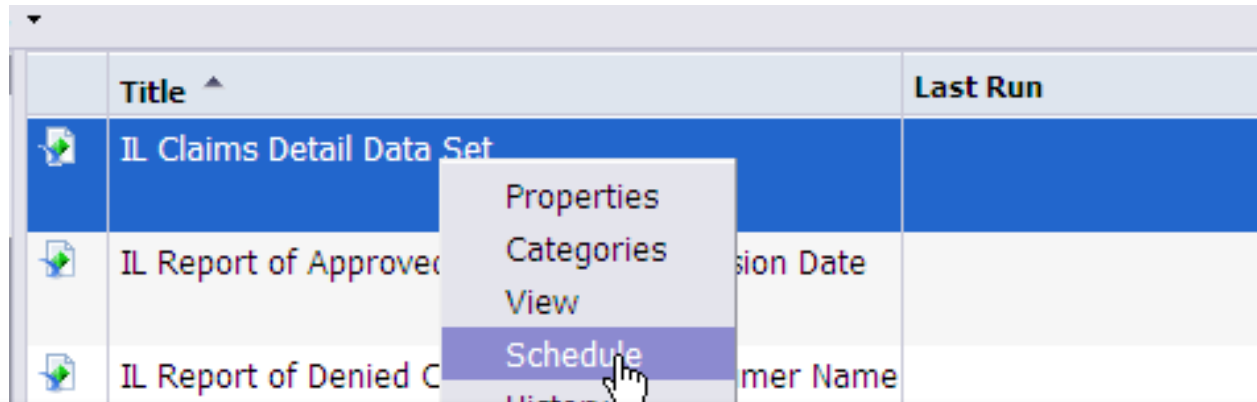


User Optional Note – Two ways to give commands

“Right Click Menus” are just one way of giving commands to the system. Right click a report name to see this menu.

You can also highlight a report name (one click), then choose a command from the **ACTIONS** button on the menu

Ways to Schedule



Most Providers will want to run a report different each time.

Use the Schedule option to customize the report to fit your needs:

- Right click a report name, choose Schedule or
- Highlight a report name, and choose Schedule from the ACTIONS menu

Scheduling is the most valuable feature of this system. Scheduling allows you to:

- Change parameters (like date ranges)
- Choose a new report title
- Choose a new report format (like PDF or Excel or CSV)

Scheduling Options

Schedule - IL Report of Claims

▼ Schedule

Instance Title

Recurrence

Database Logon

Parameters

Filters

Format

Destination

Print Settings

Events

Scheduling Server Group

The scheduling panel needs input from you. Plan on spending a few minutes to configure your new report

The text items on the left are hyperlinks to configuration screens. **Of all the options, there are 3 that you need to focus on.** The others do not necessarily require your attention!

Instance Title – Make your own title if you wish.

Recurrence - Scheduling a report to repeat on a calendar schedule (Not recommended – due to date inflexibility)

Database Logon – No need to change

Parameters – **Critical! Supply all information!**

Filters – Do not modify

Format – Change the format of the report (pdf, excel, etc)

Destination – Not recommended (no need to change)

Print Settings – No need to change

Events – Do not modify

Scheduling Server – Do not modify

Change Report Titles

▼ Schedule

Instance Title

Recurrence

Database Logon

Parameters

Filters

Format

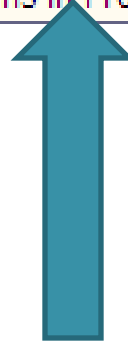
Destination

Print Settings

Event

Instance Title

IL Report of Claims in Process by Submission Date



Example: Changing the Title

- Click the “Instance Title” link (left side)
- Type a new Title Name.

Access the report parameters

Home | Document List | Open ▾ | Send To ▾ | Dashboards ▾

Schedule - IL Claims Detail Data Set

Schedule

Instance Title

Recurrence

Database Logon

Parameters

Filters

Format

Destination

Print Settings

Events

Scheduling Server Group

Parameters

Parameter	Value	
* USER ID	[EMPTY]	Edit

Example: Changing Parameters: *

- Click the “Parameters” Link on the left.
- Click the EDIT button to fill in a parameter (right side of screen)

User Warnings:

1. You must fill in all Parameters (the value “EMPTY” will fail your report)
The * means “everything and anything” for that column, and is ok to leave if necessary.
2. Be Patient. Some edits will take several seconds to load.
3. Be reasonable with your parameter requests (looking for 2 years of claims data is not a good idea for large providers)
4. Click OK when you are finished editing a parameter.

*Some reports have different parameters than others

Date parameters

Home | Document List | Open ▾ | Send To ▾ | Dashboards ▾

Schedule - IL Claims Detail Data Set

- Schedule
 - Instance Title
 - Recurrence
 - Database Logon
 - Parameters
 - Filters
 - Format
 - Destination
 - Print Settings
 - Events
 - Scheduling Server Group

Parameters

Set the initial value for this parameter

Enter prompt values.

Enter Start Date (YYYYMMDD):

Notes about Date parameters:

Filling in Parameter Values usually involves simple data entry.

However, if you do not fill out the parameter with the correct format... you will get an error, or a blank report.

20090101 does not equal Jan 1, 2009 or 1/1/2009 in database terms, because of the difference in formats.

Provider parameters

Parameters

Set the initial value for this parameter

Enter prompt values.

Enter Provider Number (* for ALL):

Available Values:

* > >> >

Selected Values:

Remove Remove All

Notes about Provider Number Parameters:

If you want a specific Provider, remove the “*” by Highlighting the “*” in the Selected Values panel (right side). Then click the REMOVE button.

Then enter a new value in the “ENTER A VALUE” box. Then click the “>” button to the right.

In the Selected Values box, all you want to see is a Provider Number (more than one is ok).

Click OK

Changing report format parameters

Home | Document List | Open | Send To | Dashboards

Schedule - IL Claims Detail Data Set

Schedule

- Instance Title
- Recurrence
- Database Logon
- Parameters
- Filters
- Format**
- Destination
- Print Settings
- Events
- Scheduling Server Group

Format

Format Options

- Microsoft Excel (97-2003) (Data Only)
- Crystal Reports
- Microsoft Excel (97-2003)
- Microsoft Excel (97-2003) (Data Only)
- Microsoft Word (97-2003)
- PDF
- Rich Text Format (RTF)
- Microsoft Word - Editable (RTF)
- Plain Text
- Paginated Text
- Tab Separated Text (TTX)
- Separated Values (CSV)
- XML

- Export images
- Use worksheet functions for summaries
- Maintain relative object position
- Maintain column alignment
- Export page header and page footer
- Simplify page headers
- Show group outlines

Notes about Report Formats:

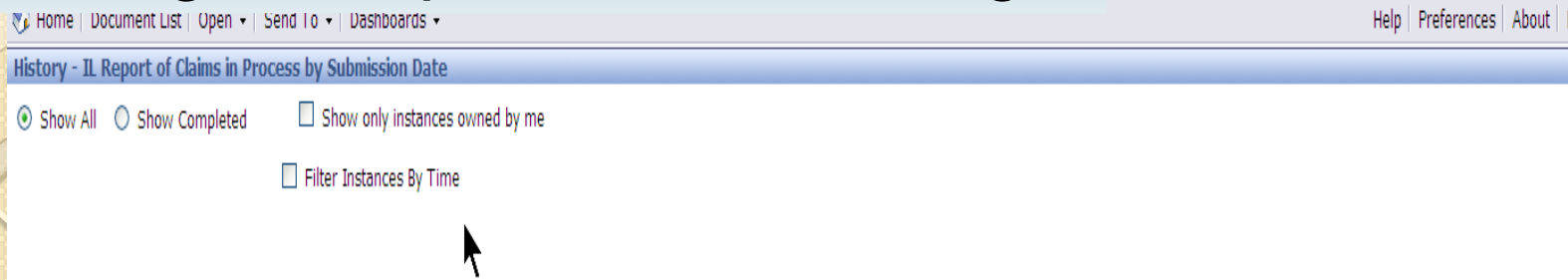
Some reports will allow you to change the format of the report.

Click the Format Link (left side) to get to Format OPTIONS.

Choose a Format that is good for you, and click OK

There is no need to modify other settings beyond the Format OPTIONS.

Running the report is “scheduling”



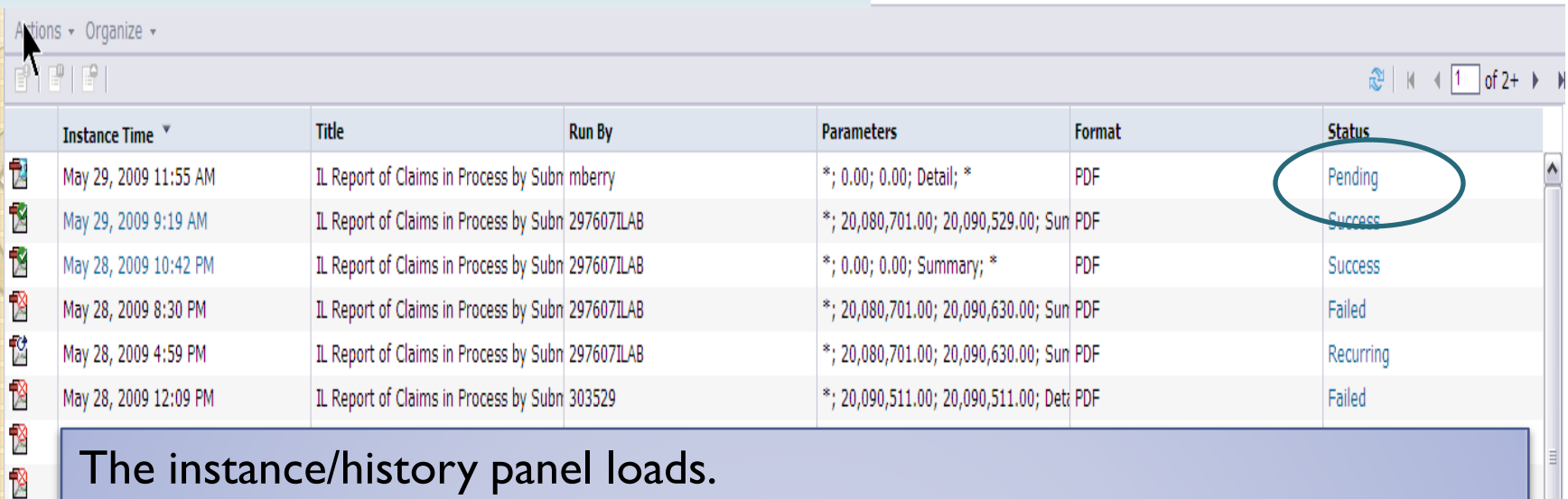
When you are finished with editing Schedule options, you can then Schedule the report.

Click the SCHEDULE button (lower right side of screen)

You will see an empty screen for several seconds. This delay is due to the report server loading your instance.

PLEASE WAIT! Do not do anything until.....(next slide)

Notes about report status



The screenshot shows a table with columns: Instance Time, Title, Run By, Parameters, Format, and Status. The first row has a status of 'Pending', which is circled in green. The table also includes a left-hand sidebar with various icons and a top navigation bar with 'Actions' and 'Organize' menus.

Instance Time	Title	Run By	Parameters	Format	Status
May 29, 2009 11:55 AM	IL Report of Claims in Process by Subn mberry		*; 0.00; 0.00; Detail; *	PDF	Pending
May 29, 2009 9:19 AM	IL Report of Claims in Process by Subn 297607ILAB	297607ILAB	*; 20,080,701.00; 20,090,529.00; Sun	PDF	Success
May 28, 2009 10:42 PM	IL Report of Claims in Process by Subn 297607ILAB	297607ILAB	*; 0.00; 0.00; Summary; *	PDF	Success
May 28, 2009 8:30 PM	IL Report of Claims in Process by Subn 297607ILAB	297607ILAB	*; 20,080,701.00; 20,090,630.00; Sun	PDF	Failed
May 28, 2009 4:59 PM	IL Report of Claims in Process by Subn 297607ILAB	297607ILAB	*; 20,080,701.00; 20,090,630.00; Sun	PDF	Recurring
May 28, 2009 12:09 PM	IL Report of Claims in Process by Subn 303529	303529	*; 20,090,511.00; 20,090,511.00; Deta	PDF	Failed

The instance/history panel loads.

This screen describes recent report that have run. Your report will be at the top. Check the instance time!

The status of your report will be “Pending”

Pending means that your report is waiting in line to be processed by the report server. Normally, this “wait” will only be 15-30 seconds, unless many other reports are attempting to run at the same time.

Refresh Status details

Your report is usually in one of 4 types of status.

To see the most recent status, click the tiny refresh button.

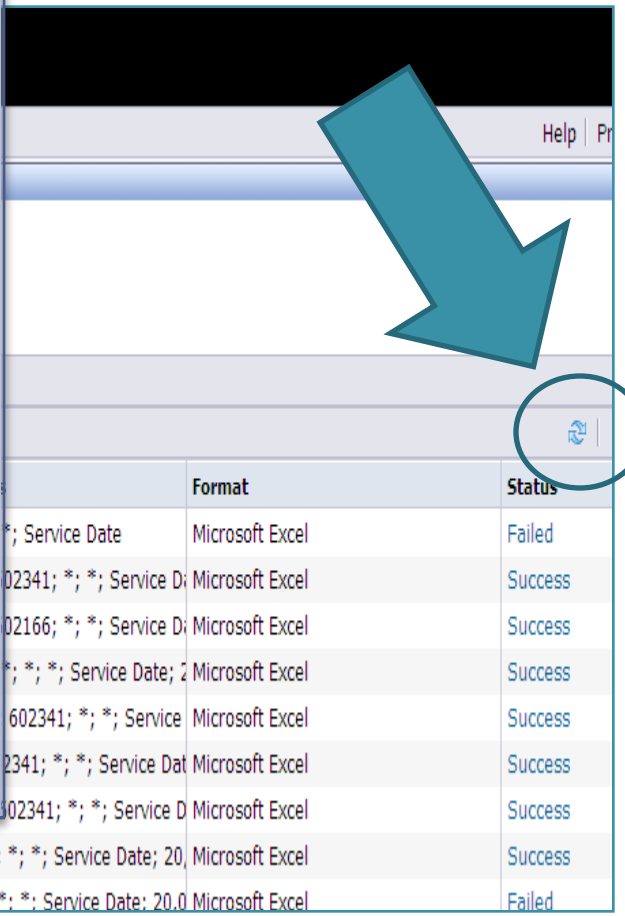
Possible Status messages:

Pending – The report is ‘waiting’ in line for its turn to run. Usually will take only a few minutes.

Running – Your data is being assembled by the report server. Usually will take only a few minutes.

Failed – Report did not run. Usually means an incorrect parameter was issued, or a parameter was left blank. Sometimes the issue is more serious, like a database error.

Success – The reports is finished and ready to view.



	Format	Status			
; Service Date	Microsoft Excel	Failed			
02341; *; *; Service D	Microsoft Excel	Success			
02166; *; *; Service D	Microsoft Excel	Success			
*; *; *; Service Date; 2	Microsoft Excel	Success			
602341; *; *; Service	Microsoft Excel	Success			
2341; *; *; Service Dat	Microsoft Excel	Success			
602341; *; *; Service D	Microsoft Excel	Success			
May 7, 2009 12:28 PM	IL Claims Detail Data Set	V5ZDWHMS	*; 602341; *; *; Service Date; 20	Microsoft Excel	Success
May 7, 2009 11:24 AM	IL Claims Detail Data Set	V5ZDWHMS	; 602341; *; *; Service Date: 20.0	Microsoft Excel	Failed

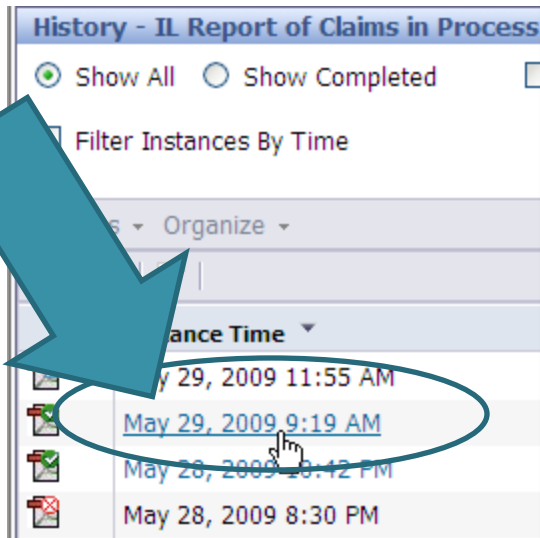
View your report

To view your report:

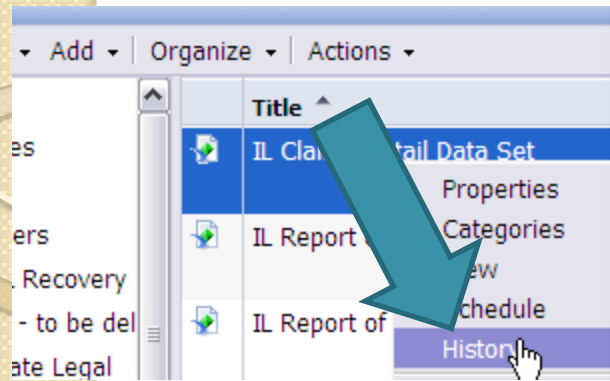
Find your report (usually at the top of the list).

Left Click the Date/Time Hyperlink. Your report will open in the chosen format (EXCEL, PDF, ETC).

You can save it locally from there. Regardless, the report server will save your report in the system.



The History feature



Your report will be saved (on the server) for a long period of time.

You can access your report in the future, by using the HISTORY feature.

Right click a report name and Choose “History” (or use the ACTIONS menu)

You will see a list of times different people have run the report,

Click a Date link (left side) to view that instance of the report.

	Apr 8, 2009 12:33 PM	IL Claims Detail Data Set	jmggin	305716; *, *, *, Service Date; 20,080,701.00 Microsoft Excel	Success
	Apr 8, 2009 12:26 PM	IL Claims Detail Data Set	jglobalbo	305716; *, *, *, Service Date; 20,080,701.00 Microsoft Excel	Success
	Apr 8, 2009 8:32 AM	IL Claims Detail Data Set	jglobalbo	*, *, *, Service Date; 20,080,701.00; Microsoft Excel	Success
	Apr 6, 2009 8:36 AM	IL Claims Detail Data Set	602454ILJS	*, *, *, Received Date; 0.00; 0.00 Microsoft Excel	Success
	Mar 25, 2009 4:16 PM	IL Claims Detail Data Set	602425	*, *, *, Received Date; 20,080,701.00 Microsoft Excel	Success
	Mar 25, 2009 3:32 PM	IL Claims Detail Data Set	324341CO	*, *, *, Received Date; 20,080,701.00 Microsoft Excel	Success

FAQ:

This report does not have the columns that I need. How do I get them there?

Sometimes you will need a custom report. All custom report requests need to be directed to Mary Smith via Email: maryesmith@illinois.gov.

No exceptions.

I don't know my password/account name

Call the EDI helpdesk.

Why does my report keep failing?

A very high number of failing reports are due to incorrect parameters. All parameters must be filled out.

Why is this report taking so long?

Several months worth of data could be accessing over several thousands of records. In cases of Excel formats, downloads may cause trouble for 65k+ rows. Only running a weeks worth of data is highly suggested. Your local network and equipment also contribute to processing times.

Can I stay logged in to Infoview all day?

No. Please Log out or close your browser window when you are finished with your reports. Each log in sessions consumes system resources, whether you are actively running reports or not. Eventually, you will be kicked off due to inactivity, and will need to log in again.

Troubleshooting Help:

Business Objects How-to Questions:

Call Michael Berry

217-801-9174, or email michael.berry@valueoptions.com

Technical Problems:

EDI Help Desk 888-247-9311 8am-6pm EST

Examples of Technical problems:

Forgot Account names or passwords or Account disabled

System “freezing” or crashing

Reports are failing and you know you are running the correct parameters

Database errors

System unavailable errors

Files will not download

Reports cannot be viewed or opened

System is responding very slowly