State & Local Government Solutions

Medicaid Information Technology System (MITS)

Overview of InfoView Reporting Participant Guide

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HP Enterprise Services
Suite 100
50 West Town Street
Columbus, OH 43215

Table of Contents

Course Overview

Overview

The goal of this course is to provide you with the skills and knowledge necessary to manage standard InfoView reports required for your role.

Objectives

In this course, you learn how to:

- Create My InfoView and update preferences
- View, refresh, and print a report
- Schedule a report
- View the history of a report
- Create a personal folder
- Move and delete a report
- Update report properties
- Save a report to a local computer

Agenda

Topic	Time in Minutes
Welcome and Introductions	10
Course Overview	5
Getting Started	15
InfoView Layout	10
Creating My InfoView	20
Updating Preferences	15
Break	**15**
Viewing and Refreshing a Report	15
Printing a Report	5
Scheduling a Report	20
Viewing the History of a Report	15

Topic	Time in Minutes
Organizing Reports	25
Saving a Report to a Local Computer	15
Review	10
Total	**195**

Getting Started

Overview

In this topic, you learn descriptions of InfoView and the three main report types.

InfoView

InfoView is a report viewer that allows you to view and manage standard reports quickly and easily.

> In the system, one or more reports represents a "document." A document may have multiple tabs, with each tab containing a different report or notes about the report(s). The structure is similar to an Excel file with multiple worksheets.
>
> In this course, the term "report" and "document" are used interchangeably for ease of discussion.

Benefits

The benefits of using InfoView to manage reports are:

- A user-friendly interface to work with standard reports quickly and easily
- Built-in report query prompts that narrow data results to meet your specific needs
- A Report Scheduler that runs reports in the background so you can continue to work on other tasks

BIAR, MAR, and SUR Report Categories

The following lists describe the BIAR, MAR, and SUR report folders and categories at a high level. To learn more about specific reports, see the descriptions under the report titles in InfoView.

BIAR:

- **Balancing Reports:** Reports in this category are reviewed after BIAR is loaded, and are used to validate the claim and non-claim loads

- **BIAR Targeted Queries:** Reports in this category focus on provider and recipient claim history, as well as home health visits. These are some of the items in the targeted reports:
    - Home health visits and costs by provider
    - Provider history, with detailed information about the provider, diagnosis, procedures, and place of services that have been used by a specific provider
    - Recipient history, with detailed information about medical visits, emergency room visits, and prescriptions

- **Executive Information System (EIS):** Reports in this category provide high-level summary, aggregate-type data that is useful for executives or those in leadership positions. The reports display information such as:
  - Provider and recipient count information per county, with the ten counties having the lowest provider-to-recipient ratio identified at the top of the report
  - Trending data that summarizes eligible recipients by geography and Medicaid plan in three ways for a three-month period
  - Totals in a graphical format for the Nursing Facility Services Program to support legislature-appropriated funding
  - Paid claims by provider type for a calendar quarter for the present year and comparison data for the previous year
  - Summary information for payments by provider type
  - The number of providers in each status based on provider type within each county
  - A list of recipient and provider counts for each county
  - The top 20 providers ranked by number of claims processed for a specified date range
  - The top 25 NDC codes
  - Enrollment counts by assistance category
  - Summary information for pharmacy claims by specific therapeutic class for a payment date range, ordered by therapeutic class code and description

- **ODJFS Corporate Documents:** Reports in this category were specifically requested by ODJFS

MAR: This category contains management reports, including the hospital paid claims summary and detail data, as well as BusinessObjects versions of the payment appropriation reports

SUR:

- **Case Tracking:** Reports in this category are useful to the SUR unit--specifically for the Case Tracking process. This information can be found in some of the Case Tracking reports:
  - Case Tracking information for cases in Open, Closed, and Purged status
  - Providers who have been suspended
  - Recipient Lock-In data

- **Random Sample Reports:** This category contains the Random Sample Claim Detail report, which provides a detailed list of claims returned by a random-sample request

- **SUR Profiler Reports:** This category contains quarterly and yearly reports that assist with identifying providers who have medical resource use that is substantially different from their peers

- **SUR Targeted Queries:** This category contains pre-defined reports that identify specific questionable practice patterns and potential instances of fraud or abuse. Reports in this category display information such as:
  - Providers, without particular specialties, who bill certain MRI or CT scans during any one calendar quarter

- All inpatient claims containing a surgical code where the surgical date is greater than the From Date of Service
- A summary of all diagnosis codes billed by the criteria selected by the user for a specific time frame
- Exception Professional claims submitted by a provider meeting the defined criteria for the report
- Providers who bill a lower number of codes than their peers
- Inpatient claims and home and community care service claims with overlapping time periods for the same recipient
- Recipients who visited multiple pharmacies and multiple non-pharmacy providers for a given date-of-service range

The majority of MAR reporting occurs through interChange panels and COLD reports.

Summary

In this topic, you learned descriptions of InfoView and the three main report types.

InfoView Layout

Overview

In this topic, you learn the basic layout of the InfoView Home page and toolbars.

Relevance

By learning the layout of the InfoView Home page and toolbars, you can locate and work with reports more quickly and efficiently.

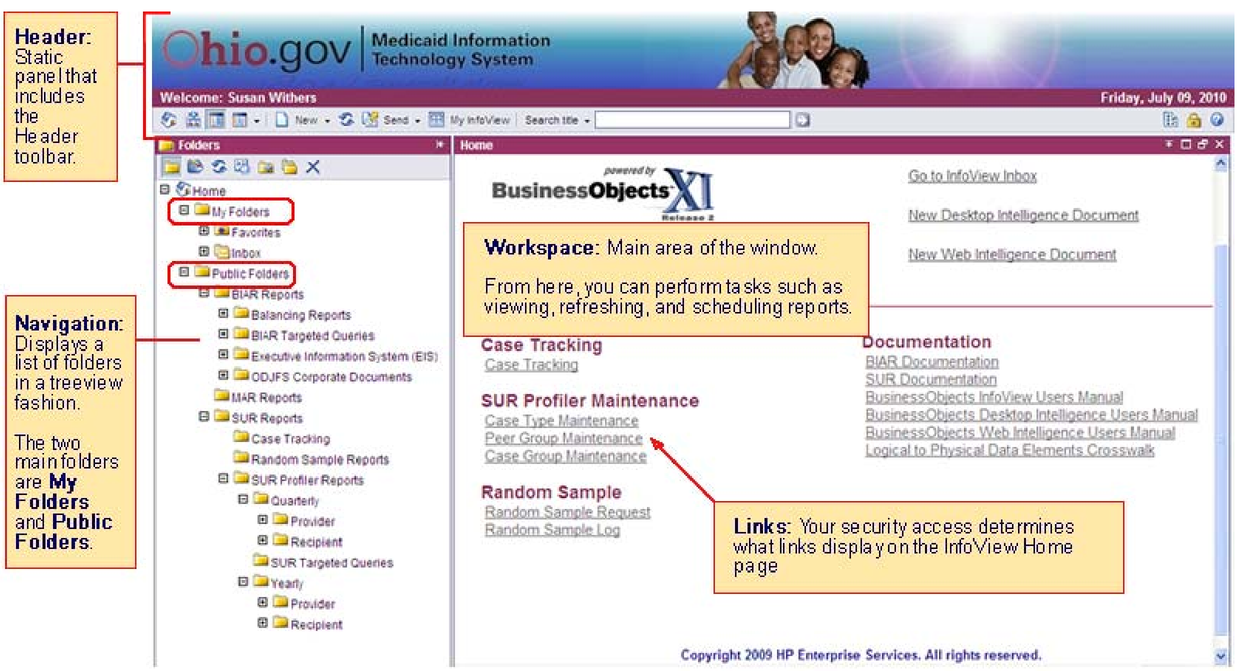
Home Page

The InfoView Home page contains three main sections:

- **Header** panel on top,
- **Navigation** panel on the left, and
- **Workspace** panel on the right.

BIAR, MAR, and SUR standard reports are stored in separate Public Folders, but the processes for managing the reports in InfoView are the same for all three report types.

This image shows an example of the InfoView Home page:



Toolbars

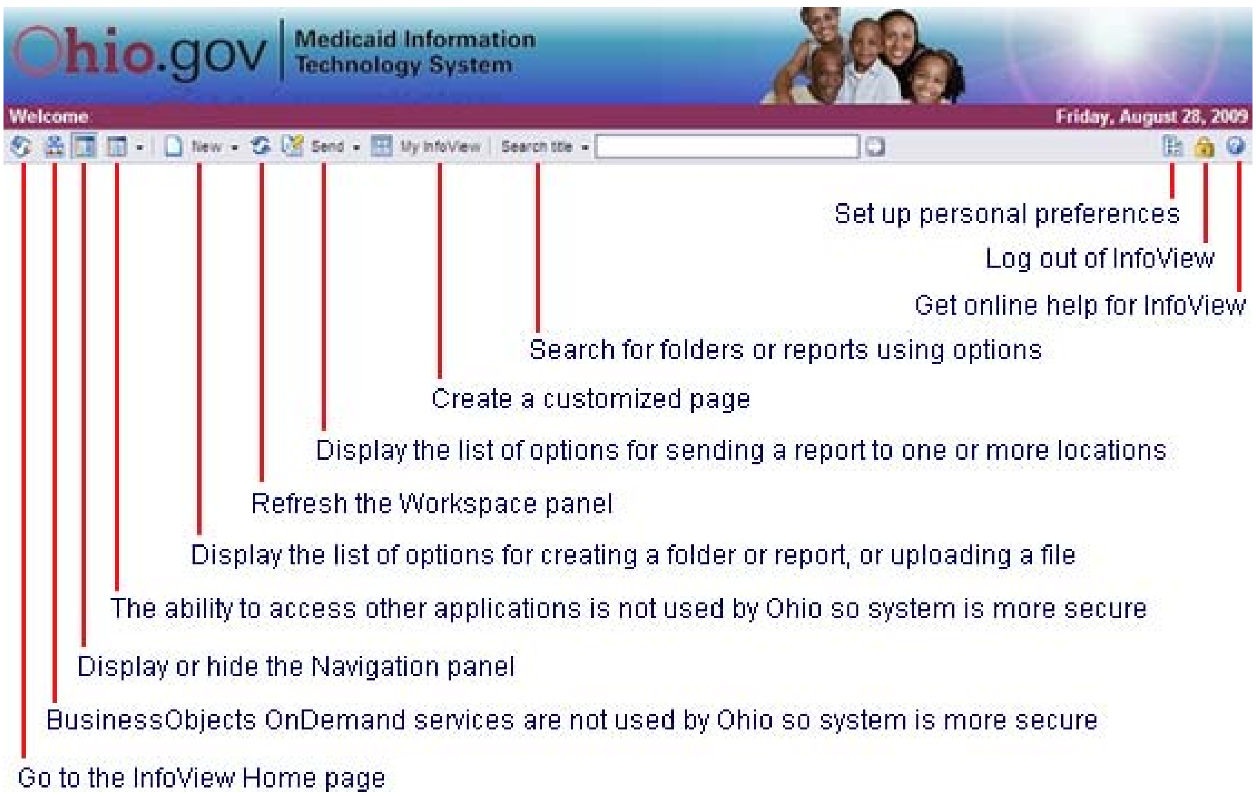
These toolbars make working with reports easier:

- Header
- Navigation
- Workspace
- Document

Header Toolbar

The Header toolbar remains static as you navigate among pages in InfoView.

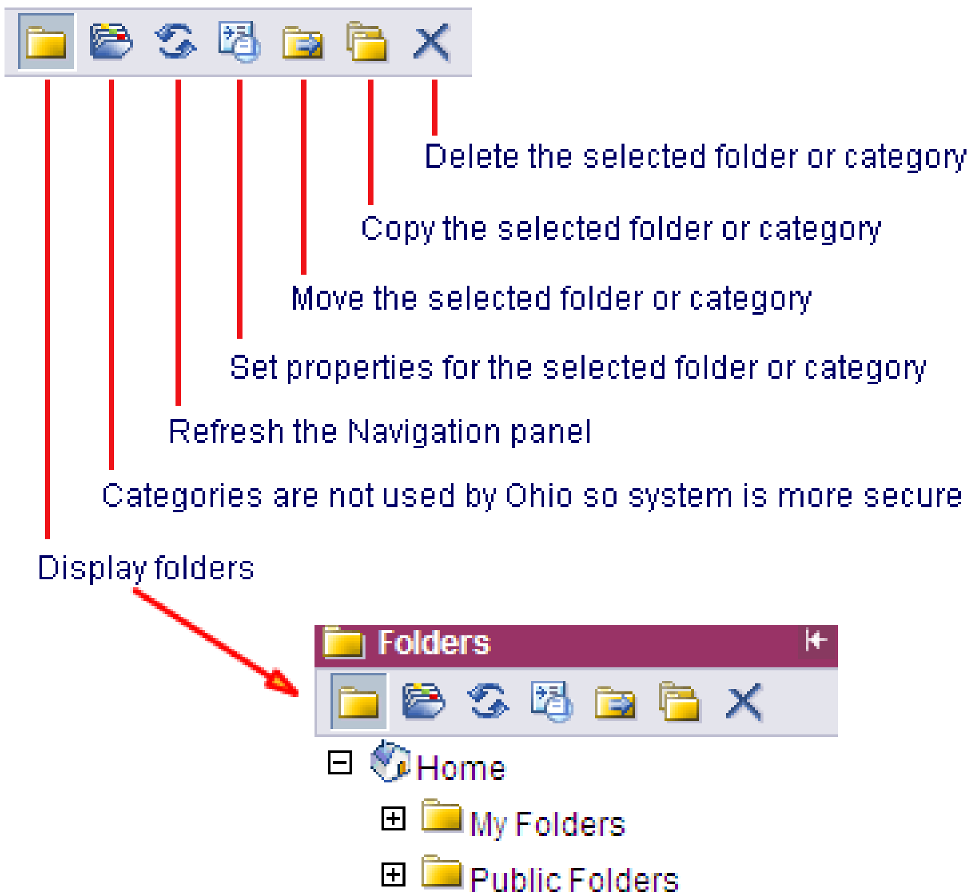
This image provides a description of each Header toolbar button:



Navigation Toolbar

The Navigation toolbar displays at the top of the Navigation panel.

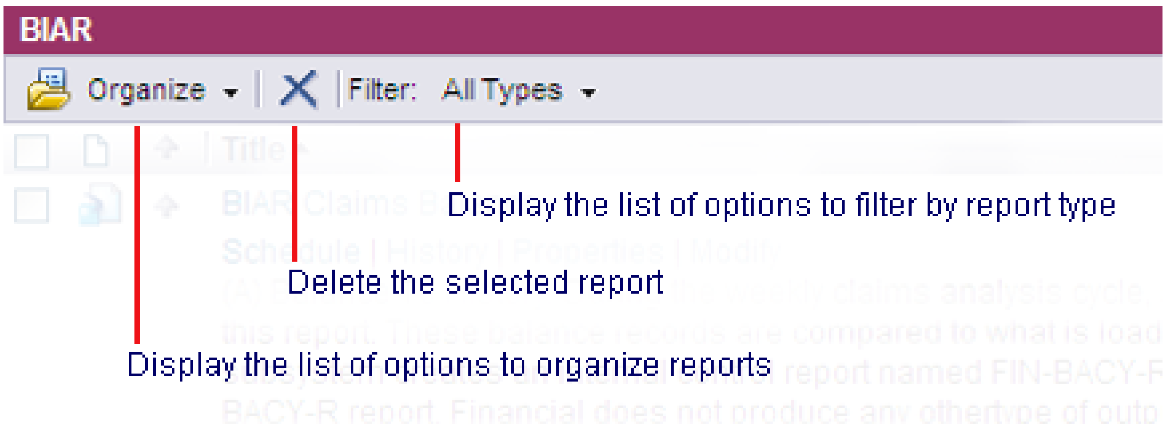
This image provides a description of each Navigation toolbar button:



Workspace Toolbar

The Workspace toolbar displays at the top of the Workspace panel after you select a report folder in the Navigation panel.

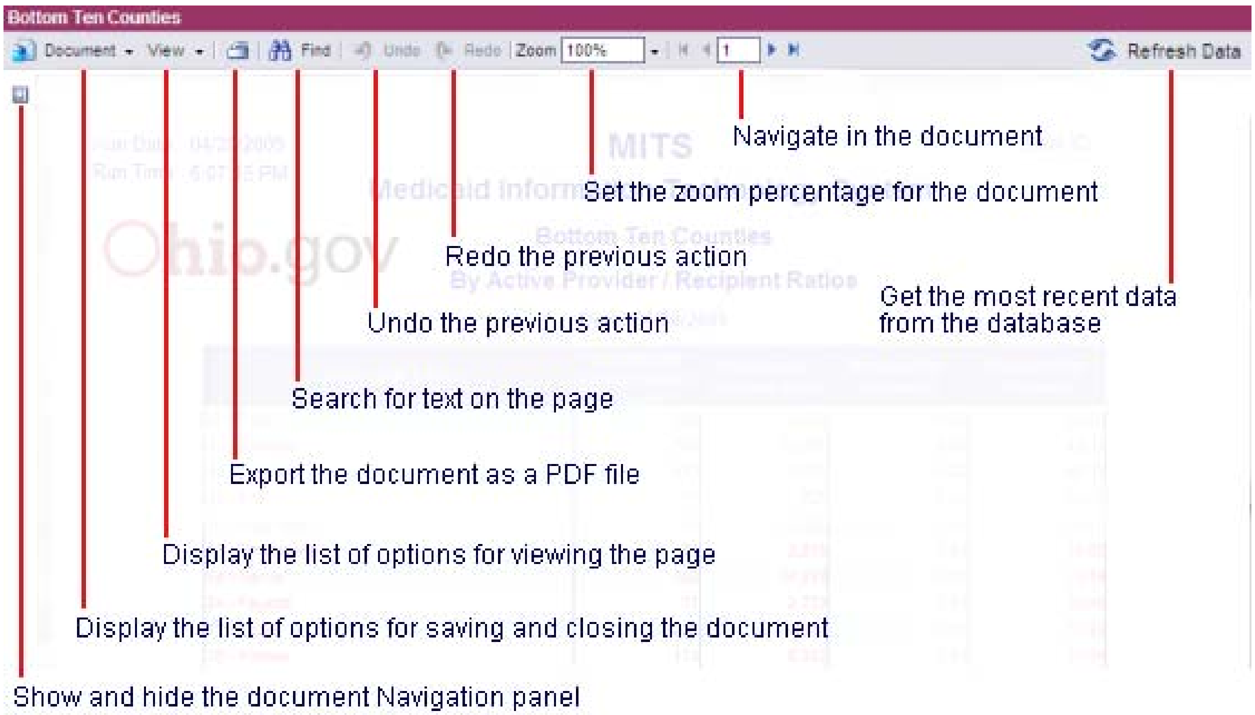
This image provides a description of each Workspace toolbar button:



Document Toolbar

The Document toolbar displays after you open a report in the Workspace panel.

This image provides a description of each Document toolbar button:



Summary

In this topic, you learned the basic layout of the InfoView Home page and toolbars.

Creating My InfoView

Overview

In this topic, you learn how to create My InfoView. You can divide your browser window into various panes for your own customized InfoView page.

You can create more than one My InfoView.

Who

TBD

When

You can create My InfoView at any time; however, it is often helpful to do so when you first start using the system.

Relevance

By creating My InfoView, you can customize the view of reports that are specific to your job, allowing you to locate and work with reports more efficiently.

How To

Follow these steps from the InfoView Home page to create My InfoView:

Step	Action
1	Click **My InfoView** on the **Header** toolbar.
2	Select the desired template.
3	Click **Define Content**.
4	Select the desired options and click **OK**.
5	Repeat Steps 3 and 4 for all configurations as desired.
6	Click **Save**.

Success

You have successfully completed this task when My InfoView displays in your Favorites folder and reflects the desired options.

Practice

Create My InfoView using this information:

- **Template:** Two Columns
- **Location of Report for First Column:** Public Folders>BIAR Reports>Executive Information System (EIS)
    - o Select a report of your choice
- **Location of Report for Second Column:** Public Folders>BIAR Reports>BIAR Targeted Queries
    - o Select a report of your choice

Summary

In this topic, you learned how to create My InfoView.

Updating Preferences

Overview

In the last topic, you learned how to create My InfoView to divide your browser window into various panes for your own customized page. In this topic, you learn how to customize your display settings further by updating preferences.

For example, you can make My InfoView your Home page, choose how many reports you want to display in a list, and select the default format for your reports.

Who

TBD

When

You can update preferences at any time; however, it is often helpful to establish preferences when you are first using InfoView. This is similar to selecting viewing options in Microsoft Office applications, and helps you to tailor InfoView to meet your viewing needs.

Relevance

By customizing your display settings, you can tailor the display to match what you need for your job. This helps you to locate and work with reports more efficiently.

Requirements

Depending on the business need and your security access, you may need to install special software to view reports.

IF you want to:	THEN choose this format:	AND you will need:
View in a web browser	HTML (Hypertext Markup Language)	Only the current browser through which you are using InfoView, such as Internet Explorer **Note:** At times, this format may truncate images; if this happens, switch to the PDF format.
View as a read-only document	PDF (Portable Document Format)	Adobe Reader software **Note:** The PDF format works well for displaying images; however, you cannot save files in an Excel format to your computer when this option is selected.
View in Desktop Intelligence	Desktop Intelligence	Desktop Intelligence software

You learn how to save a report as a PDF, Excel, or CSV file in the *Saving a Report to a Local Computer* topic.

How To

Follow these steps from the InfoView Home page to update preferences:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click Preferences on the Header toolbar.</td></tr>
<tr><td>2</td><td>Specify the desired Destination by following these steps:
<table>
<tr><th>TO set:</th><th>THEN:</th></tr>
<tr><td>The default report view</td><td>Click the Desktop Intelligence tab.</td></tr>
<tr><td>All other preferences</td><td>Click the General tab.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>Select the desired options and click OK.</td></tr>
</table>

Success

You have successfully completed this task when the Preferences page reflects the desired options.

Practice

Update preferences using this information:

- Preferences page>General tab
- **My initial view is:** Favorites
- **On my desktop:** 12, which sets the number of objects per page

Summary

In this topic, you learned how to update preferences.

Viewing and Refreshing a Report

Overview

In this topic, you learn how to view and refresh a standard report. Standard reports are stored in subfolders within **Public Folders**.

Who

TBD

When

You can view and refresh a report at any time.

Relevance

Refreshing a report lets you view the most up-to-date data from the BIAR data warehouse.

The BIAR data warehouse is updated weekly. Claims are appended to BIAR for the claims that finalized for the week with the financial cycle for Paid and Denied claims, and adjusted originals are updated to signify there are no longer current versions of the claims.

How To

Follow these steps from the InfoView Home page to view and refresh a report:

Step	Action
1	Expand **Public Folders** and select the desired subfolder.
2	Click the title of the desired report. **Note:** Use the navigation buttons to see additional reports.
3	Click **Refresh Data** on the **Document** toolbar. **Note:** The **Run Date** in the upper-left corner of the report tells you when the report was last refreshed.
4	If the **Prompts** window displays, respond to the prompts and click **Run Query**. **Note:** Prompt values allow you to specify what data to include when refreshing a report.

Success

You have successfully completed this task when a refreshed report displays.

Practice

View and refresh a report using this information:

- **Location:** Public Folders>BIAR Reports>Executive Information System (EIS)
- **Report:** Bottom Ten Counties

Summary

In this topic, you learned how to view and refresh a report.

Printing a Report

Overview

In this topic, you learn how to print a report.

Who

TBD

When

It is helpful to print a report whenever a hard-copy document will aid in your data analysis, such as if you want to highlight information on a page.

How To

Follow these steps from the InfoView Home page to print a report:

Step	Action
1	Expand **Public Folders** and select the desired subfolder.
2	Display the desired report.
3	Click **Export to PDF for Printing** on the **Document** toolbar.
4	Click **Open**.
5	Proceed as you normally would to print a file.

If you right-click a report that is open in the Workspace panel and select **Print**, this prints only the first page of the report.

Summary

In this topic, you learned how to print a report.

Scheduling a Report

Overview

In this topic, you learn how to schedule a report. Scheduling a report allows you to refresh the report while working on other tasks.

Each time you schedule a report, it is known as an **instance** of the report. You can compare a previous version of a report with the latest instance to analyze the changes.

After you schedule a report successfully, the instance appears in the report's history.

Who

TBD

When

You can schedule a report at any time.

Relevance

When you schedule reports, you can perform other tasks while the reports are running, and later retrieve the completed refreshed reports, thus allowing you to be more productive with your time and efforts.

You can also schedule reports for specific time frames to support your job needs. These are the scheduling choices:

- Now
- Once
- Hourly
- Daily
- Weekly
- Monthly

Guidelines

Inboxes

You can schedule reports from Public Folders to either the Default Inbox, which is your own InfoView Inbox, or Specific Inbox, which is the Inbox of one or more other InfoView users.

These Inboxes are specific to InfoView and do not connect with your regular email system. As shown in the *InfoView Layout* topic, your Inbox is part of the My Folders structure, along with your Favorites folder.

Cleaning up Instances

When you choose the **Default Inbox** or **Specific Inbox** option for scheduling a report, you can select **Clean up instance after scheduling** to remove the latest scheduled instance of the report from the corresponding Public Folder.

Clean up instance after scheduling is a good choice when you send a **copy** of a report, but **not** when you send a shortcut, because if you delete the public instance, the shortcut does not work.

When you schedule a report, many options display in the **Destination** drop-down list. It is important to select only **Default Enterprise location**, **Default inbox**, or **Specific inbox** from the list. Also, do **not** change **anything** in these sections: **Print Settings**, **Caching Options**, **Server Groups**, or **Events**.

How To

Follow these steps from the InfoView Home page to schedule a report:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Expand Public Folders and select the desired subfolder.</td></tr>
<tr><td>2</td><td>Click Schedule for the desired report title.</td></tr>
<tr><td>3</td><td>Verify that the instance title is correct.
Note: You can keep the default instance title or rename the report instance.</td></tr>
<tr><td>4</td><td>Select the desired option from the Schedule option drop-down list.</td></tr>
<tr><td>5</td><td>Expand the Destination section.</td></tr>
<tr><td>6</td><td>Specify the desired Destination by following these steps:
<table>
<tr><th>TO send the report to:</th><th>THEN:</th></tr>
<tr><td>Yourself</td><td>Select Default Inbox from the Destination drop-down list.</td></tr>
<tr><td>One or more individuals</td><td>a. Select Specific Inbox from the Destination drop-down list.
b. Select User from the Choose drop-down list.
c. Select the desired recipient(s) and move each to the Selected Recipients list.
d. Select the desired options in the Send As section. (Select Shortcut to send a link.)</td></tr>
<tr><td>One or more groups of people</td><td>a. Select Specific Inbox from the Destination drop-down list.
b. Select Group from the Choose drop-down list.
c. Select the desired group(s) and move each to the Selected Recipients list.
d. Select the desired options in the Send As section. (Select Shortcut to send a link.)</td></tr>
</table>
</td></tr>
<tr><td>7</td><td>If visible, expand the Prompts section and follow these steps:
a. Click Modify values.
b. Enter the desired data in the fields.
c. Click Apply.</td></tr>
<tr><td>8</td><td>Click Schedule.</td></tr>
<tr><td>9</td><td>Periodically click Refresh until the Status column changes to Success.</td></tr>
</table>

Success

You have successfully completed this task when the **Status** column in the report's **History** page changes to **Success**.

Practice

Schedule the Provider History report twice for the same provider--first for January 2009; then for the first quarter of 2009, using this information:

- **Location:** Public Folders>BIAR Reports>BIAR Targeted Queries
- **Report:** Provider History
- **Schedule option**: Now
- **Destination:** Specific Inbox
- **Recipients:** Select the training usernames provided by your instructor
- **Send As:** Copy
- **Prompts** window:
    - Provider Medicaid ID: **2354945**
    - Payment Begin Date: **01/01/2009**
    - Payment End Date: **01/31/2009**
- **After** you schedule the report successfully, **schedule the same report again** using this information in the **Prompts** window:
    - Provider Medicaid ID: **2354945**
    - Payment Begin Date: **01/01/2009**
    - Payment End Date: **03/31/2009**

> In the next topic, you are going to view the history of a report. To save time, you will view previously-scheduled reports instead of waiting for the reports from this Practice session to refresh.

Summary

In this topic, you learned how to schedule a report.

Viewing the History of a Report

Overview

In this topic, you learn how to view the history of a report. You can view instances of a report from the report's history page.

Who

TBD

When

It is helpful to view the history of a report whenever you want to compare data from different parameters or dates to analyze changes.

Relevance

You can compare previous versions of a report with the latest instance to analyze changes. This helps you identify data variances and trends.

How To

Follow these steps from the InfoView Home page to view the history of a report:

Step	Action
1	Expand **Public Folders** and select the desired subfolder.
2	Click **History** for the desired report title.
3	Click the date for the desired instance. **Note:** Select the most recent date in the History page to view the latest instance of the report.

Success

You have successfully completed this task when you view the desired instance of a report.

Practice

View the history of a report using this information:

- **Location:** Public Folders>BIAR Reports>BIAR Targeted Queries
- **Report:** Provider History

Summary

In this topic, you learned how to view the history of a report.

Organizing Reports

Overview

In this topic, you learn how to organize reports by creating a personal folder, moving a report, and deleting a report.

Who

TBD

When

You can organize reports at any time; however, it is helpful to organize reports on a regular basis to maintain efficiency in locating information for your job.

Relevance

Adding personal folders to your Favorites folder helps you to organize reports and retrieve them more quickly. You can move reports from your Inbox to personal folders and delete reports. This helps you to locate and manage your reports more efficiently.

How To

Follow these steps from the InfoView Home page to organize reports:

Creating a Folder

Step	Action
1	Expand **My Folders**.
2	Select the **Favorites** folder.
3	Select **Folder** in the **New** drop-down list.
4	Type the desired folder name in the **Folder Name** field.
5	Type a description in the **Description** field.
6	Type keywords in the **Keywords** field. **Note**: Adding keywords allows you to search by keywords.
7	Click **OK**.

Moving a Report

Step	Action
1	Expand **My Folders**.
2	Select **Inbox**.
3	Select the checkbox for the desired report. **Note**: To choose all reports, select the checkbox in the column heading.
4	Select **Move to New Folder** in the **Organize** drop-down list.
5	In the location section, expand **My Folders** and then expand **Favorites**.
6	Select the desired destination folder.
7	Click **OK**.

Deleting a Report

Step	Action
1	Expand **My Folders**.
2	Select **Inbox** or the desired personal folder.
3	Select the checkbox for the report you want to delete. **Note**: To choose all reports, select the checkbox in the column heading.
4	Click **Delete** on the **Workspace** toolbar.
5	Click **OK**.

Success

You have successfully completed this task when your personal folder(s) or Inbox reflect your changes.

Practice

Organize reports using this information:

Create a Folder:

- **Folder Name:** Training
- Description and keywords of your choice

Move a Report:

- **From:** Inbox
- **Report:** One of the Provider History report instances
- **To:** Training folder

Delete a Report:

- **From:** Inbox
- **Report:** Provider History

Summary

In this topic, you learned how to organize reports.

Updating Report Properties

Overview

In this topic, you learn how to update report properties. You can modify the title, description, and keywords of a report in any of your personal folders.

	You cannot update report properties in Public Folders.

Who

TBD

When

You can update report properties at any time; however, it is helpful to update properties on a regular basis to maintain efficiency in locating and managing information for your job.

Relevance

Updating report properties helps you to keep track of each report's purpose and description, and allows you to locate and analyze data more efficiently.

For example, you could schedule a report to your Inbox to retrieve data for a specific procedure code for a particular provider. You could then update the report's title and description to reflect the parameters you chose.

Then, you could schedule the same report again with different parameters, and update the properties for that instance of the report.

By updating report properties in this way, you can locate specific instances quickly and compare data among reports easily.

How To

Follow these steps from the InfoView Home page to update the properties of a report:

Step	Action
1	Expand **My Folders**.
2	Select **Inbox** or the desired personal folder.
3	Click **Properties** for the desired report.
4	Modify the **Title**, **Description**, and **Keywords** fields as desired.
5	Click **OK**.

Success

You have successfully completed this task when the report properties reflect your updates.

Practice

Update report properties using this information:

- **Folder:** Training
- **Report:** Provider History
- Title, description, and keywords of your choice

Summary

In this topic, you learned how to update report properties.

Saving a Report to a Local Computer

Overview

In this topic, you learn how to save a report in another file format to a local computer.

Who

TBD

When

It is helpful to save a report to a local computer whenever you need to have access to data outside of InfoView.

For example, you could save a report in an Excel format to combine with other data in a workbook.

Relevance

By saving a report in another file format to your computer, you can:

- Share the report with users who do not have access to InfoView
- Work with the report on your own outside of InfoView
- Save an InfoView report to your computer to associate with a case in the SUR Case Tracking subsystem

Requirements

When you save a report to your computer, these versions of Microsoft Office are supported with the current InfoView application:

- 2000
- 2000 SP3
- 2000 SR1
- 2003
- 2003 SP1
- 2003 SP2
- XP
- XP SP1
- XP SP2
- XP SP3
- 2007

How To

Follow these steps from the InfoView Home page to save a report to your computer:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Display the desired report.</td></tr>
<tr><td>2</td><td>Click the Document arrow, point to Save to my computer as, and specify the desired Destination using these steps:
<table>
<tr><th>TO:</th><th>THEN select this format:</th></tr>
<tr><td>View and print only</td><td>Adobe Acrobat PDF</td></tr>
<tr><td>Combine report data with other data in an Excel workbook</td><td>Microsoft Excel</td></tr>
<tr><td>Make report data available so other programs can manipulate the data</td><td>CSV (Comma-Separated Value)

Note: You can also open a CSV file in Excel, make changes, and save the file as you would a regular Excel file.</td></tr>
</table>
</td></tr>
<tr><td>3</td><td>Click Save.</td></tr>
<tr><td>4</td><td>Proceed as you normally would to save a file to your computer.</td></tr>
</table>

The layout of some reports may not convert well to Excel, so it is good to double-check the conversion results.

There is no storage limit defined for Ohio at the moment, but if needed, HP can:

- Lock permissions to limit the ability to save to local folders
- Store only a certain number of reports
- Limit file sizes

Success

You have successfully completed this task when a report is saved from InfoView to your computer.

Practice

Save a report to your computer using this information:

- **Folder:** Training
- **Report:** Provider History
- **Format:** Excel

Summary

In this topic, you learned how to save a report to a local computer.

Review

In this course, you learned how to:

- Create My InfoView and update preferences
- View, refresh, and print a report
- Schedule a report
- View the history of a report
- Create a personal folder
- Move and delete a report
- Update report properties
- Save a report to a local computer