



Medicaid Information Technology System

State & Local Government Solutions

Medicaid Information Technology System (MITS)

Reports & Letters (Online GUI Reports) Participant Guide

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Course Overview

Overview

The goal of this course is to provide you with the knowledge and common skills necessary to generate online reports and letters, using the Ohio MITS graphical user interface (GUI).

Objective(s)

After completing this course you should be able to complete these tasks:

- Locate online reports
- Describe the difference between on-demand and online batch reports
- View, compare, and print on-demand reports
- Request online batch reports
- Generate and print online letters

Agenda

Topic	Time
Welcome and Introductions	10 minutes
Course Overview	5 minutes
Introduction to Online Reports	15 minutes
Locating Online Reports	40 minutes
Break	15 minutes
Viewing, Comparing, and Printing On-Demand Reports	40 minutes
Requesting Batch Reports	35 minutes
Break	15 minutes
Introduction to Online Letters	15 minutes
Generating Online Letters	35 minutes
Review (Q&A)	15 minutes

Prerequisites

Before taking this course, you must complete the following courses:

- Introduction to MITS

In addition, you should have basic skills in using Internet Explorer, Adobe Acrobat Viewer, and Internet Explorer.

Introduction to Online Reports

Overview

MITS provides access to a variety of online reports. You access the online reports from a link in the submenu of a MITS subsystem.

Online reports are available in these MITS subsystems:

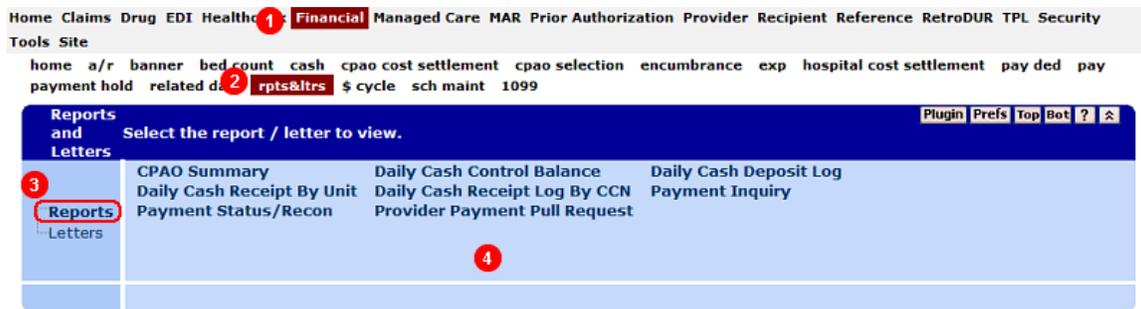
- Financial
- Provider
- RetroDUR
- TPL

In this lesson you will have the opportunity to see the **Reports** panel and familiarize yourself with the types of online reports that are available.

The Reports Panel

A **rpts & ltrs** link appears in the submenu of the MITS subsystems that include online reports and letters. This link displays the **Reports and Letters** panel for the subsystem in which the link resides.

The following image illustrates the **Reports and Letters** panel in the Financial subsystem:



The steps for locating the **Reports & Letters** panel are the same for each of the MITS subsystems that provide online reports:

- 1) Select the appropriate MITS subsystem.
- 2) Click **rpts & ltrs** from the submenu.
- 3) Click **Reports**, if it is not already selected by default.
- 4) Click an individual report link to open the report panel.



Some MITS subsystems, such as TPL, include reports but not letters. In these subsystems, there is a **Reports** link that displays the **Reports** panel.

Types of Online Reports

You can generate two types of online reports using the MITS GUI:

- **Online, on-demand reports** - Reports that run in real time, at the time of your request
- **Online, batch reports** - Reports that run in the regular batch cycle, using parameters you submit online



These online batch reports are not the same as the standard, pre-defined batch reports that are available in COLD/EDMS.

The following table details the differences between the two types of online reports:

	On-Demand	Batch
Access	Online on-demand reports allow you to access information in "real time."	Online Batch reports are system-generated and are only available at pre-determined times.
Availability Timeframe	You <u>generate</u> online on-demand reports for immediate use.	You <u>request</u> online batch reports, scheduling them for inclusion in a batch process.
Format	On-demand reports are available in these formats: <ul style="list-style-type: none"> • pdf • Microsoft Excel • HTML 	Batch reports are available in these formats: <ul style="list-style-type: none"> • ascii text
Applicable Subsystems	Online on-demand reports are available in the following MITS subsystems: <ul style="list-style-type: none"> • Financial • Provider • RetroDUR • TPL 	There are only a few online batch reports and they reside in these MITS subsystems: <ul style="list-style-type: none"> • Provider <ul style="list-style-type: none"> ○ Adhoc Report ○ Label Report • TPL <ul style="list-style-type: none"> ○ AOS DCN ○ Estate Recoveries

Check Your Understanding

This activity contains questions to assess your understanding of key concepts in this topic. Review the topic if your score is below your standards.

All of the reports listed in a **Reports & Letters** panel are available for immediate generation and use.

- A. True
- B. False

All subsystems that contain reports display a **rpts & ltrs** link.

- A. True
- B. False

Summary

In this lesson you learned which MITS subsystems offer online reports, and you saw an example of the **Reports** panel.

In addition, you learned about the two types of online reports:

- On-demand
- Batch

Locating Online reports

Overview

What

In this topic you learn how to use the MITS graphical user interface (GUI) to locate online reports.

Who

This task is performed by OHP staff members who need the information from online reports to complete their job duties.

When

You normally use these online reports to start your workflow—to obtain data to complete your jobs tasks.

Relevance

Online reports enable you to easily access the data that is necessary to do your job.

Failure to complete these tasks correctly may result in the following problems:

- You may not be able to access report information in a timely manner.
- OHP staff members may not be able to perform necessary job functions.

Requirements

You must have the appropriate MITS security role to complete this task.

How To

Follow these steps from any MITS page to locate an online report:

Step	Action
1	Click the link for the subsystem that contains the report you want to run.
2	Click the rpts & ltrs link in the submenu.  Subsystems that do not contain any letters display a reports link instead of the rpts & ltrs link.

Success

You have successfully completed this task when you have located the correct online report.

Practice

Locate the reports for each of these subsystems:

- Financial
- Provider
- RetroDUR
- TPL

Summary

In this topic you learned how to locate the online reports in the MITS subsystems that contain them.

Viewing, Comparing, and Printing on-demand reports

Overview

What

In this topic you learn how to view, compare, and print on-demand reports.

Who

This task is performed by OHP staff members who need the information provided by on-demand reports.

When

You normally use these on-demand reports to start your workflow—to obtain data to do your jobs tasks.

Relevance

On-demand reports:

- Enable you to easily and quickly access the data that is necessary to do your job
- Allow you to access report information in real time, whereas batch reports are only accessible at pre-determined times

Failure to complete these tasks correctly may result in the following problems:

- You may not be able to access report information in a timely manner.
- OHP staff members may not be able to perform necessary job functions.

Requirements

You must have the appropriate MITS security role to complete this task.

How To

Follow these steps from any MITS page to view, compare, and print an on-demand report:

Step	Action						
1	Click the subsystem that contains the report you want to generate.						
2	Click rpts and ltrs . Note: In some subsystems, the link may be called reports .						
3	Click a report name to display the report-specific panel. New panels open on the same page, below all other open panels.						
4	Complete the relevant fields in the panel.						
5	Click view .						
6	Do you want to compare this report to another version of the same report using different reporting criteria? <table border="1" data-bbox="380 911 1375 1335"> <thead> <tr> <th>IF:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>no</td> <td>Continue to step 7.</td> </tr> <tr> <td>yes</td> <td> <ul style="list-style-type: none"> a. Return to the panel where you generated the first version of the report. b. Complete the appropriate fields with the data that you want to use as a comparison. For example, provide a different date range. c. Select the Compare Reports checkbox. d. Click view. Each version of the report appears in its own browser window. </td> </tr> </tbody> </table>	IF:	THEN:	no	Continue to step 7.	yes	<ul style="list-style-type: none"> a. Return to the panel where you generated the first version of the report. b. Complete the appropriate fields with the data that you want to use as a comparison. For example, provide a different date range. c. Select the Compare Reports checkbox. d. Click view. Each version of the report appears in its own browser window.
IF:	THEN:						
no	Continue to step 7.						
yes	<ul style="list-style-type: none"> a. Return to the panel where you generated the first version of the report. b. Complete the appropriate fields with the data that you want to use as a comparison. For example, provide a different date range. c. Select the Compare Reports checkbox. d. Click view. Each version of the report appears in its own browser window.						
7	Do you want to print your report? <table border="1" data-bbox="380 1400 1375 1745"> <thead> <tr> <th>IF:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>no</td> <td>End of task</td> </tr> <tr> <td>yes</td> <td> <ul style="list-style-type: none"> a. Click the Print icon on the application that is displaying the report (Internet Explorer, Microsoft Excel, or Adobe Acrobat Viewer.) <p>Note: If you have more than one report open for comparison, you must print them individually.</p> <ul style="list-style-type: none"> b. End of task </td> </tr> </tbody> </table>	IF:	THEN:	no	End of task	yes	<ul style="list-style-type: none"> a. Click the Print icon on the application that is displaying the report (Internet Explorer, Microsoft Excel, or Adobe Acrobat Viewer.) <p>Note: If you have more than one report open for comparison, you must print them individually.</p> <ul style="list-style-type: none"> b. End of task
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no	End of task						
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Success

You have successfully completed this task when you have displayed the desired report(s), compared them (if specified), and printed them (if desired).

Practice

Generate an on-demand report using this information:

- Subsystem = Financial
- Report = Payment Status Recon **Note:** The instructor may specify a different report for use during this practice session.
- Financial Cycle = Test Cycle
- Date Range = 1/1/2009 - 12/31/2009

The following image illustrates a sample report:

Report: FIN-PY60-O	MITS	Run Date: 02/12/2010
From Date: 05/14/2009	Medicaid Information Technology System	Run Time: 2:01 PM
To Date: 05/14/2009	Payment Status/Recon	Page # 1 of 1
Checkwrite Total		Category Total
05/14/2009 Checkwrite	\$1,555.08	
Check Amount		\$56.75
EFT Amount		\$1,498.33
Issued in MITS		\$56.75
Issued in OAKS		\$1,441.00
Stopped		\$57.33

Summary

In this topic you learned how to generate, compare, and print on-demand reports.

Requesting Batch Reports

Overview

What

In this topic you learn how to request a batch report using the MITS GUI.

Who

This task is performed by OHP staff members who need the information provided by online batch reports.

When

You use these online batch reports to obtain the information necessary to do your job tasks.

Relevance

Online batch reports allow you to specify or select key reporting criteria to control the information that is to be included on the report. For example: date ranges, provider number, recipient number, etc...

Failure to complete these tasks correctly may result in:

- Reports that contain the wrong information
- Reports not generating correctly
- OHP staff members not able to perform necessary job functions in a timely manner

Requirements

You must have the appropriate MITS security role to complete this task.

How To

Follow these steps from any MITS page to use the MITS GUI to request a batch report:

Step	Action						
1	<p>Select the batch report that you want to request by following these steps:</p> <table border="1" data-bbox="370 527 1377 1276"> <thead> <tr> <th data-bbox="370 527 618 615">IF the subsystem is:</th> <th data-bbox="618 527 1377 615">THEN you should:</th> </tr> </thead> <tbody> <tr> <td data-bbox="370 615 618 957">Provider</td> <td data-bbox="618 615 1377 957"> Follow these steps: <ol style="list-style-type: none"> Click Provider. Click rpts & ltrs. Select one of the batch reports: <ul style="list-style-type: none"> ○ Adhoc Report ○ Label Report Click add. Complete all of the appropriate fields in the report-specific panel. Click save. </td> </tr> <tr> <td data-bbox="370 957 618 1276">TPL</td> <td data-bbox="618 957 1377 1276"> Follow these steps: <ol style="list-style-type: none"> Click TPL. Click report request. Select the report that you want to request. Click add. Complete all of the appropriate fields in the report-specific panel. Click save. </td> </tr> </tbody> </table>	IF the subsystem is:	THEN you should:	Provider	Follow these steps: <ol style="list-style-type: none"> Click Provider. Click rpts & ltrs. Select one of the batch reports: <ul style="list-style-type: none"> ○ Adhoc Report ○ Label Report Click add. Complete all of the appropriate fields in the report-specific panel. Click save. 	TPL	Follow these steps: <ol style="list-style-type: none"> Click TPL. Click report request. Select the report that you want to request. Click add. Complete all of the appropriate fields in the report-specific panel. Click save.
IF the subsystem is:	THEN you should:						
Provider	Follow these steps: <ol style="list-style-type: none"> Click Provider. Click rpts & ltrs. Select one of the batch reports: <ul style="list-style-type: none"> ○ Adhoc Report ○ Label Report Click add. Complete all of the appropriate fields in the report-specific panel. Click save. 						
TPL	Follow these steps: <ol style="list-style-type: none"> Click TPL. Click report request. Select the report that you want to request. Click add. Complete all of the appropriate fields in the report-specific panel. Click save. 						
2	After the batch cycle has completed, retrieve your report from COLD/EDMS.						

Success

You have successfully completed this task when MITS displays the "Save was successful" message.

Practice

Locate the Provider, Adhoc Report.

Add a new request using the following data:

- **Type From** = 21
- **Type To** = 21
- **County from** 1 to 2
- **Group indicator** =Group
- **Contract** = Clinic
- **Status** = Active
- Save your request.

If you receive errors, determine which field is incorrect based upon the error message, and correct the values that you provided.

Summary

In this topic you learned how to use the MITS GUI to submit a request for a batch report.

Introduction to Online Letters

Overview

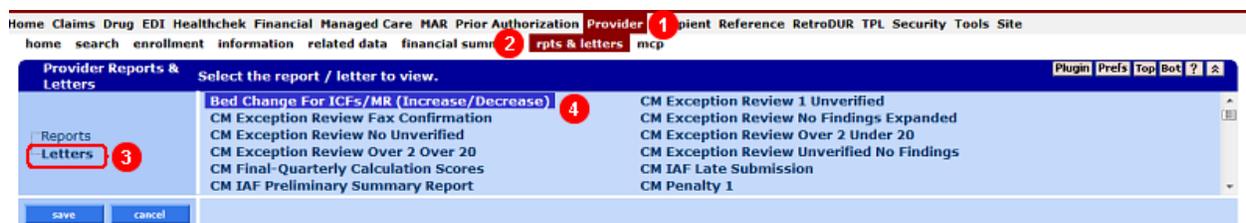
MITS provides you with online tools to complete and send letters, as required by your business process, using the MITS GUI.

Using the online tools, you can generate online letters that include information from the MITS databases, as well as information that you provide by completing the online forms.

Letters In the Reports & Letters Panels

A **rpts & ltrs** link appears in the submenu of the MITS subsystems that include online reports and letters. This link displays the **Reports and Letters** panel for the subsystem in which the link resides.

The following image illustrates the **Letters** portion of the **Reports and Letters** panel in the Financial subsystem:



The steps for locating online letters that reside in the **Reports and Letters** panel are the same for each of the MITS subsystems that provide online letters:

- 1) Select the appropriate MITS subsystem.
- 2) Click **rpts & ltrs** from the submenu.
- 3) Click **Letters**, if it is not already selected by default.
- 4) Click an individual letter link to open the letter panel.

Letters Embedded Within Other Functions

In some cases, you will find links for generating letters in places other than a **Reports and Letters** panel. Where appropriate, some functional areas include links to letters that are specific only to that function. An example is the **Generate Letter** panel that is accessible only from the **Cash Receipts Maintenance** panel.

In this image, there is a panel to generate a specific letter, regarding cash receipts, to the provider shown:

The screenshot displays the Ohio MITS interface. At the top, the 'Financial' tab is selected (1). The 'Tools Site' menu includes 'cash' (2). A search bar shows 'CCN' (3). The 'Cash Receipt Information' panel displays details for a receipt from MCDONALD PEDIATRICS LLC, including a paid amount of \$100.00 and a receipt date of 06/26/2010. The 'Cash Receipt Maintenance' panel has a 'Generate Letter' button (4). Below it, the 'Base Information' panel shows 'FIN-5200-O - Refund Letter for Insufficient Information' (5) and a 'Generate Letter' button.

The basic steps for generating online letters that reside in other MITS panels are as follows:

- 1) Select the appropriate MITS subsystem.
- 2) Click an area from the submenu.
- 3) Display the pertinent information using the applicable panels. For example, search for a provider.
- 4) Click **Generate Letter**.
- 5) Provide or select the appropriate parameters for your letter, and click **Generate Letter**.



For these function-specific letters, the steps may vary to gather all of the information necessary to generate the specific letter that you chose.



Some function-specific letters are dependent upon the existence of certain conditions or data. If those conditions or data do not exist, the letter will not generate. For example, if all of the required expenditures or accounts payable records do not exist in MITS, certain financial letters will not generate upon demand.

Types of Online Letters

You determine when to generate the online letters based upon your standard business processes. Because these letters do not run automatically, as part of a batch, they are known as "on-demand" letters.

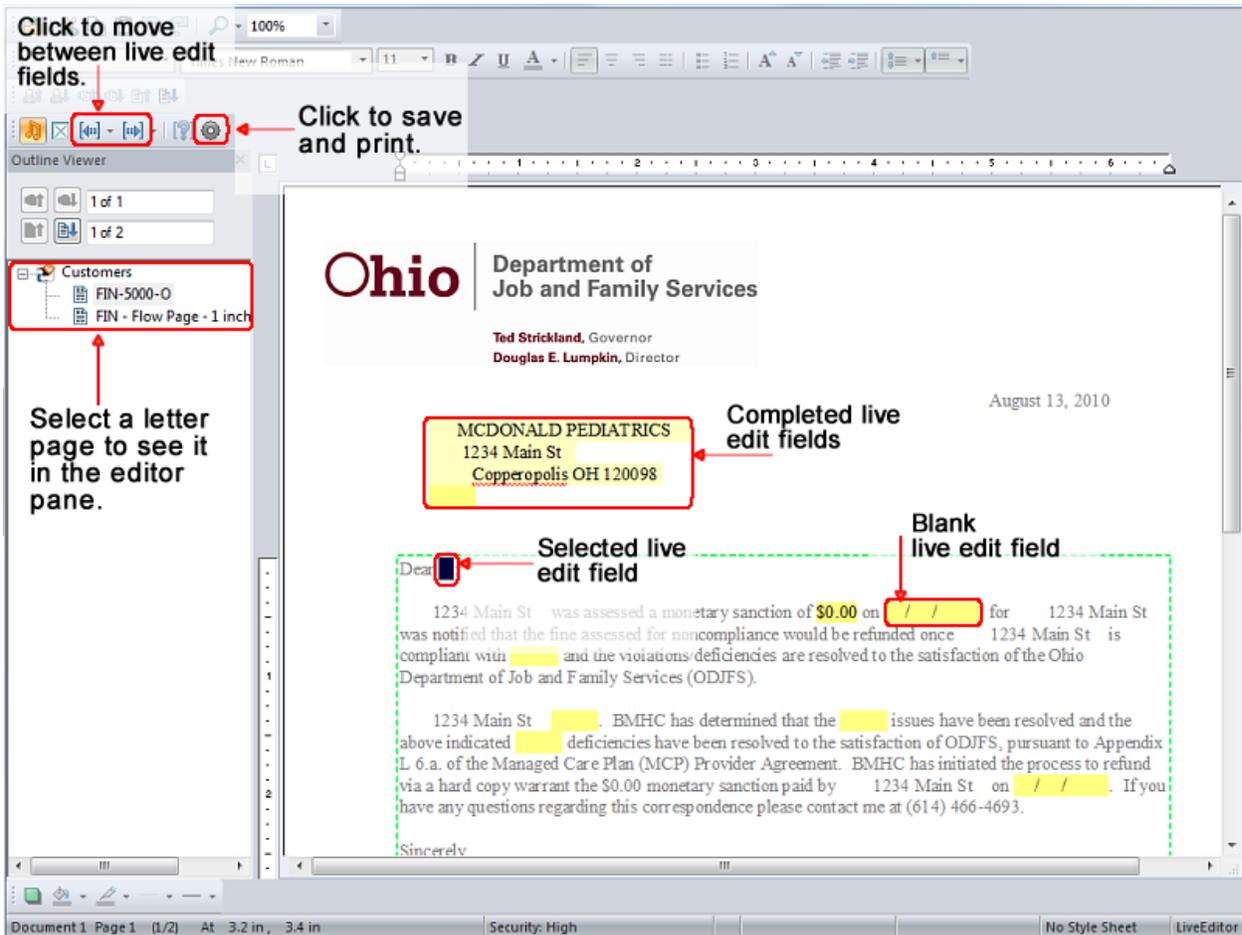
MITS creates two types of on-demand letters:

Type	Description
Standard	MITS automatically provides all of the required information that appears in the letter. The content of the letter is not editable.
Live Edit	You provide some of the key information using editable fields in the letter. Most of this information comes from sources outside of MITS.

The Live Edit Program

MITS is integrated with a letter generator program called Live Edit. This program allows you to generate online letters that include information that it retrieves from the MITS databases, as well as information that you provide when you generate and print the letter.

The following image illustrates an on-demand letter, shown in the Live Edit program. The key functions of the Live Edit program are highlighted.



Check Your Understanding

This activity contains questions to assess your understanding of key concepts in this topic. Review the topic if your score is below your standards.

In the **Reports & Letters** panel, links to letters appear on the same page as links to reports.

- A. True
- B. False

All links to letters in MITS appear on a subsystem's **Reports and Letters** panel.

- A. True
- B. False

Summary

In this lesson you learned that MITS provides access to online, on-demand letters that support your job tasks.

Also, you learned that letters appear in the **Reports and Letters** panel of many subsystems, as well as within other panels to provide access to function-specific letters.

Finally, you learned to identify the key components of the Live Edit program so you will be able to complete a live edit letter.

Generating Online Letters

Overview

What

In this topic you learn how to generate online letters using the MITS Graphical User Interface (GUI).

Who

This task is performed by OHP staff members who are responsible for generating online letters.

When

You should perform this task when a specific process or task requires you to use MITS to generate a letter.

Relevance

You use MITS to generate letters because the letters pertain to a specific process or task where MITS contains part or all of the information included in the letter.

Requirements

Some letters require that you have the Live Edit software installed on your PC.

How To

Follow these steps from any MITS page to run an online, on-demand letter:

Step	Action
1	Click a Subsystem link.
2	<p>If the letter that you want to run is located in a reports & letters submenu, continue to Step 3.</p> <p>If the letter that you want to run is located inside another MITS task, navigate to the appropriate panel, and go to Step 5.</p>
3	<p>Click rpts & ltrs.</p> <p>Remember: Some letters are located in other submenus.</p>
4	Click Letters on the Reports and Letters panel.
5	Select the appropriate letter from the list.
6	Complete any of the required fields. Some letters require specific information to continue, such as a provider ID, fiscal period, date range, etc...
7	<p>The method for opening the letter will vary depending on the letter.</p> <p>For some letters, there is a view link. For others, you may simply need to select a row of data to print the letter based upon the row that you select.</p>
8	When prompted, click Open from the File Download dialog box.
9	<p>If your letter includes editable fields, provide the required information.</p> <p> A brief description of the required information appears in a tool tip when you move your mouse pointer over the field.</p>
10	Click the Other Actions icon, and select Local Print from the pop-up menu.
11	Click OK on the Live Edit dialog box that displays the success message.
12	<p>When the LiveEditor dialog box opens and displays the location (URL) where your letter is stored, you can write down this address if you want.</p> <p>Click OK.</p>

13	When the Adobe Acrobat Viewer opens your letter in PDF mode complete the following steps: a. Review the letter for the correct name and address. b. Review the letter to ensure that every live edit field is complete and contains accurate values.
14	Print the letter.

Success

You have successfully completed this task when you have generated, completed, and printed the appropriate letter for your job task.

Practice #1

Generate an HCAP Pre-Assessment Letter using this information:

- Subsystem = Financial
- Letter = HCAP Pre-Assessment Letter
- Provider ID = 8520079536
- Provide fictitious answers for each of the live edit fields.

When you complete the practice, please do not print the letter.

Practice #2

Locate and generate an LTC Provider Agreement Checklist using this information:

- Provider ID = 8520079536
- Effective Dates: Your choice
- Return Reason: Your choice

Generate the letter as a PDF, but please do not print the checklist.

Summary

In this topic you learned how to generate online letters.

Review

Review

In this course you learned how to:

- Locate online reports
- Describe the difference between on-demand and online batch reports
- View, compare, and print on-demand reports
- Request online batch reports
- Generate and print online letters