Reports

Any MOHSAIC system entry field can be retrieved from the system in the form of a report.

The reporting tool used is Crystal Reports.

Crystal Reports is accessed by selecting the Reports link.

Reports – Business Objects Page

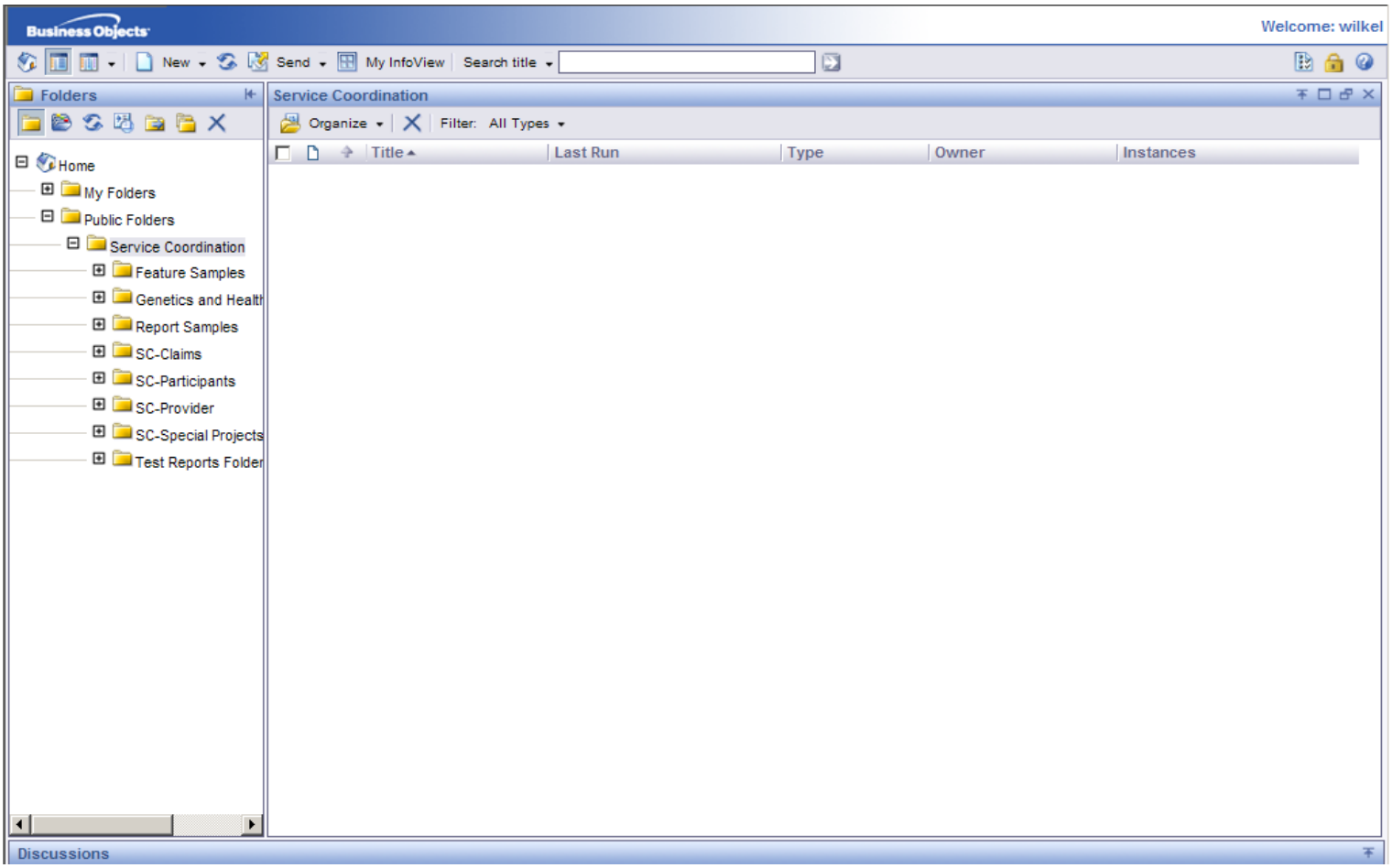
The system will open a separate IE Window to display the Business Objects page (the original IE window with the MOHSAIC system displayed remains open in the background).

A user's ID and password has been 'passed through' from MOHSAIC to Crystal, so the initial login is unnecessary.

Reports – Service Coordinator Folder

Select the '+' next to Public Folder, to display the Service Coordination folders.

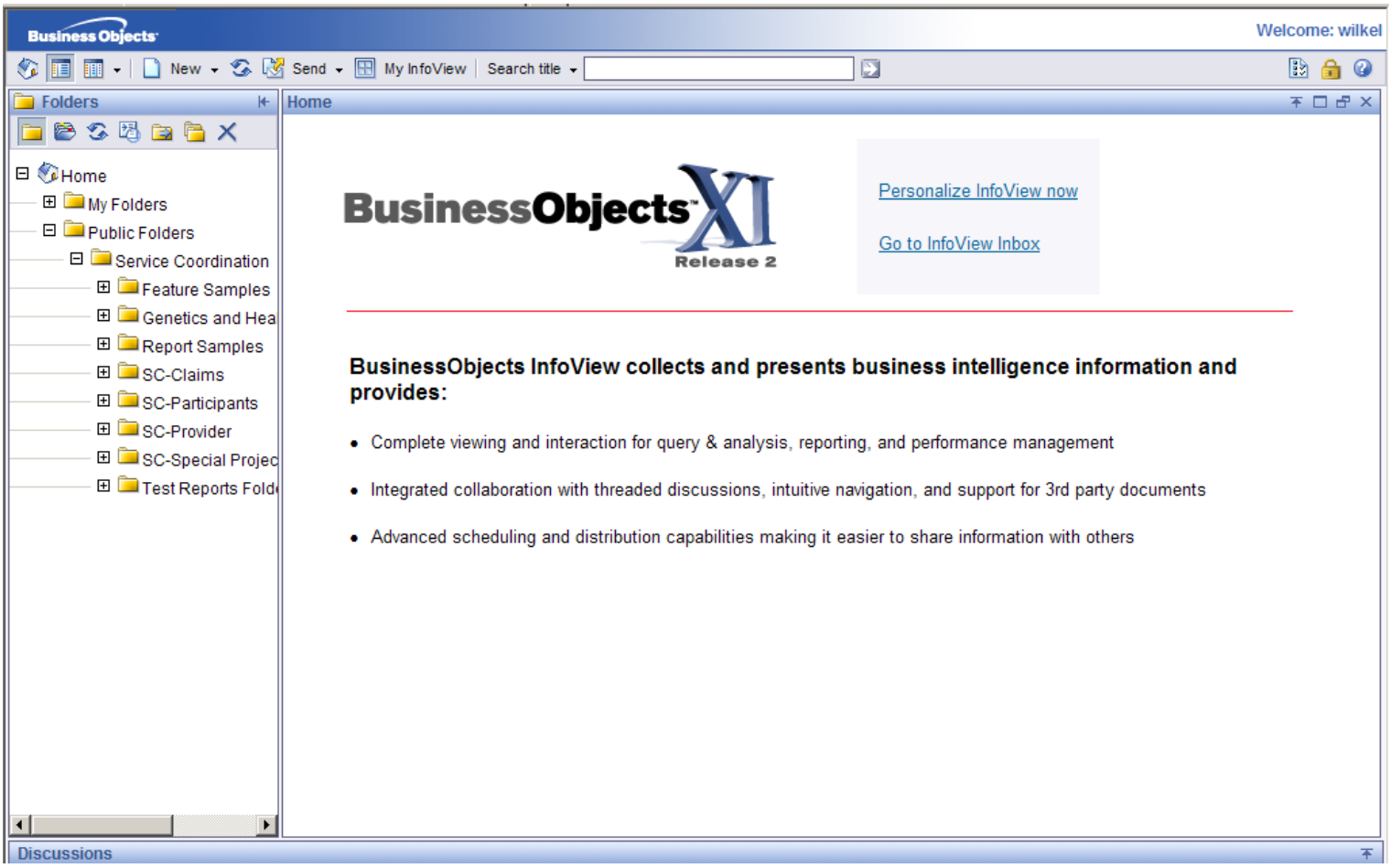
To access the folders in the Service Coordination folder, select the '+' next to Service Coordination Folder.



Reports –Folders

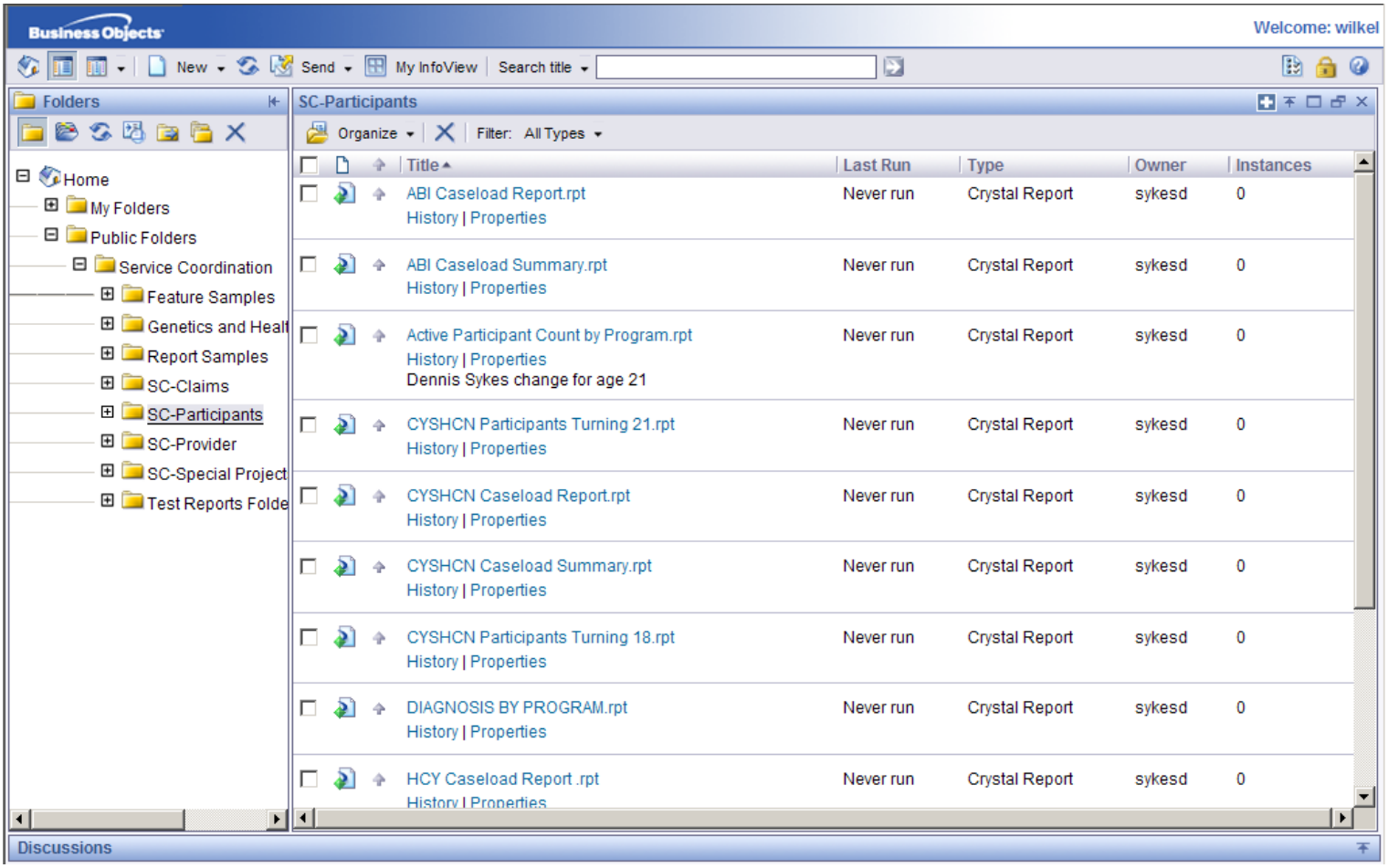
Access to report folders are based on a user's level of system access.

The Report system has Claims, Participants, Provider, Special Projects and Test folders to designate the type or phase of a report.



Reports –Sub-Folders

To display a report in a folder, select the folder title. In this example the SC Participants folder is selected.

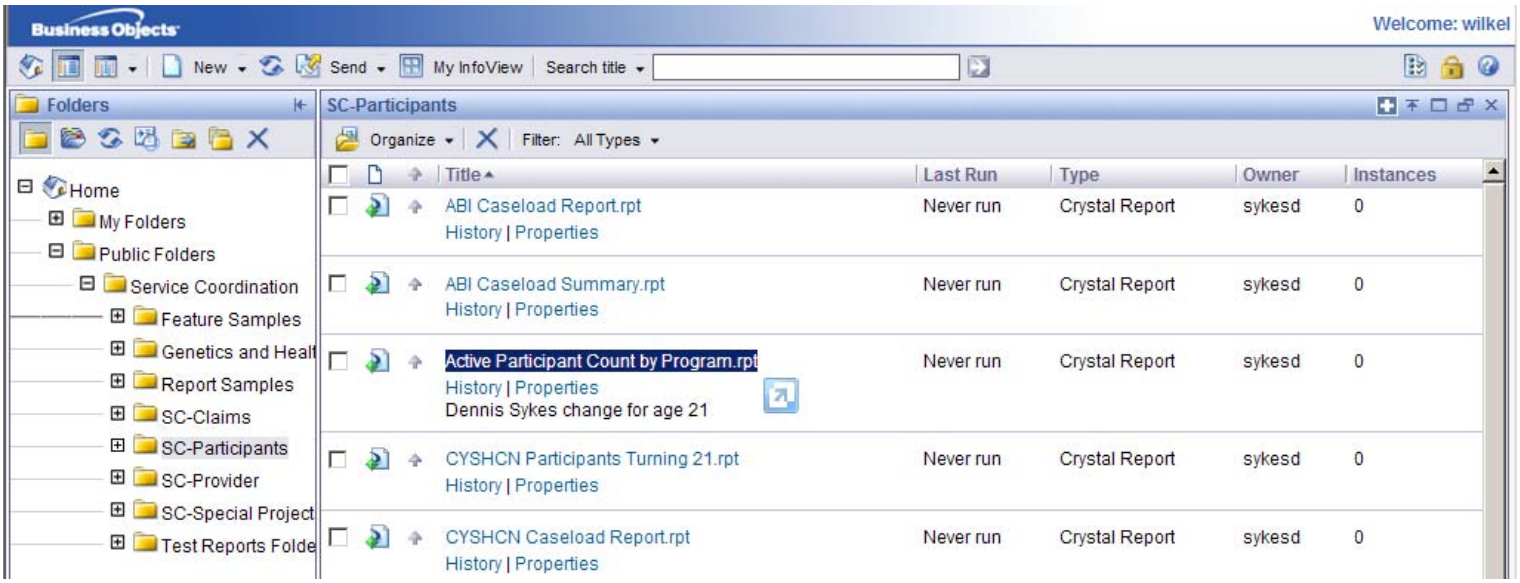


Reports –Select/Access Specific Report

To select a specific report, select a report name.

The Parameter page for a report will display. (Disregard all other information on this page.)

For this example the Active Participant Count by Program report title is selected.

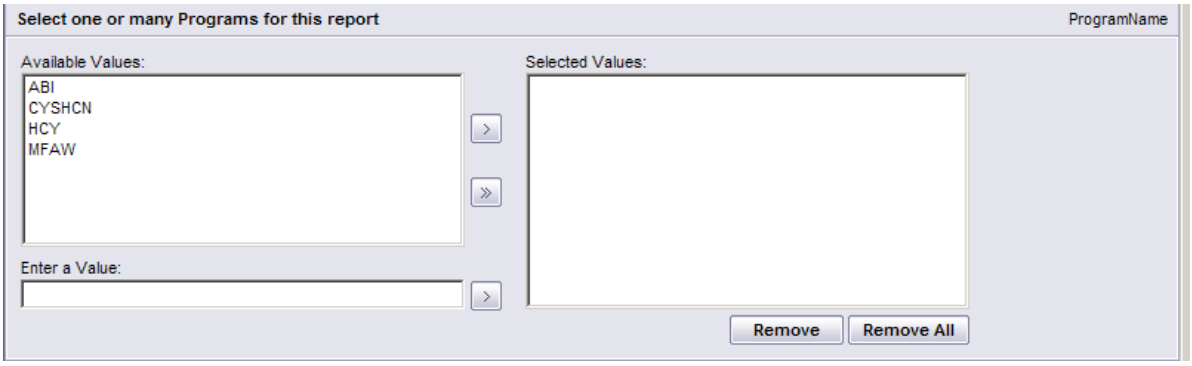


Reports –Parameter Page

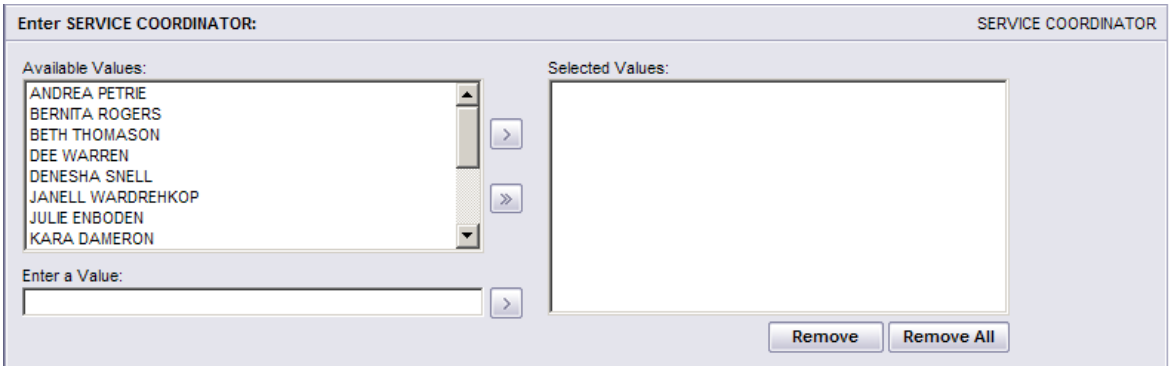
Parameters are used to designate how a report should be grouped, (i.e., Program, Service Coordinator or Region). Some reports also have date parameters to designate a period of time, i.e., week, month, year, fiscal year, etc.

To complete entry for a Program, Service Coordinator or Region, a user must make a selection.

Program Parameter:



Service Coordinator Parameter:

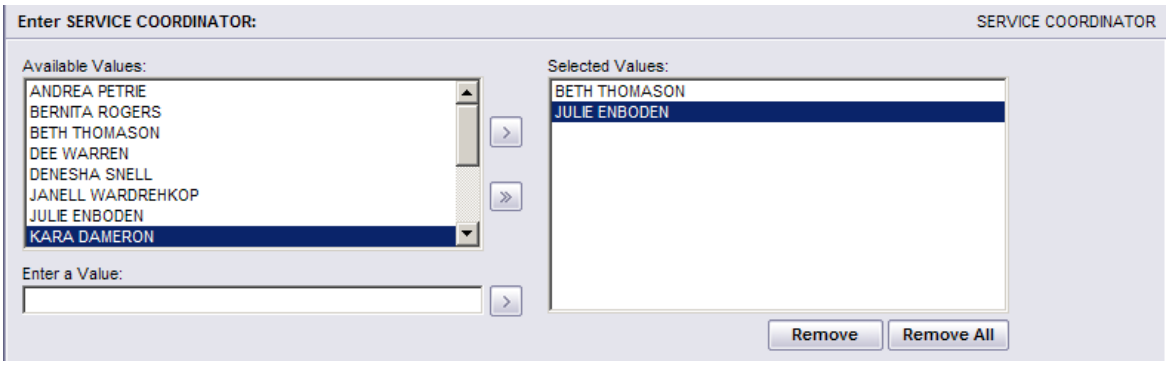


Date Parameters:

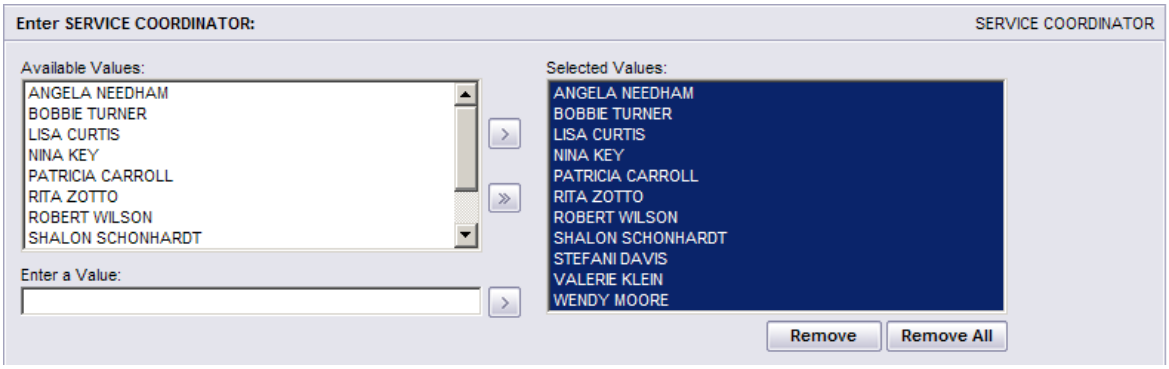
Reports –Parameter Field Selection

Objects may be selected individually, to tailor a report to just a few options.

A user can select each choice and use the '>' to move each object to the right side of the parameter field.



Or a user may select the '>>' button to move all objects, at once, into the right side of the parameter field to create a report that contains all options.



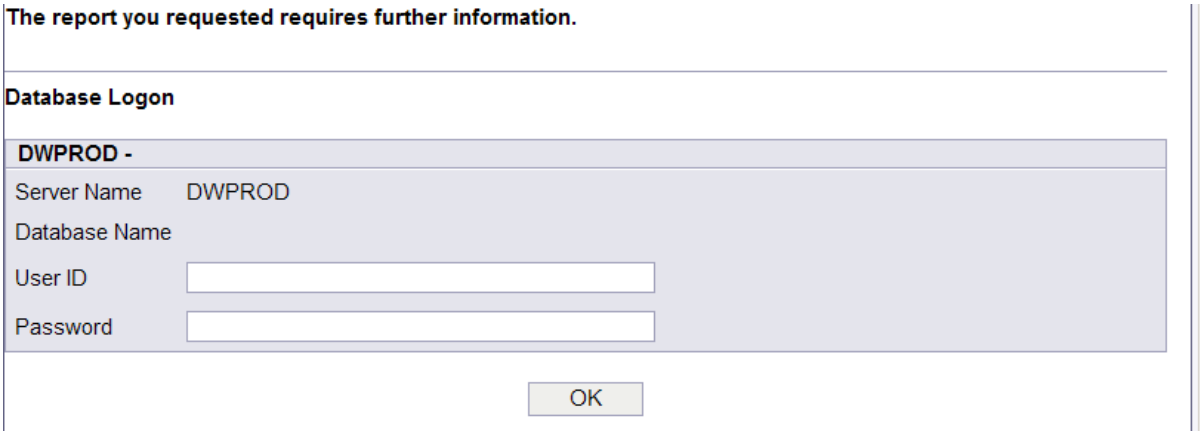
Format for date entry in any date parameter field is YYYY-MM-DD (i.e., 2013-01-31). A user must use the dash (-) vs. a forward slash (/) in a date parameter field.

There is also a calendar icon provided for date selections.

Reports –Second Login

The Crystal Reports system will require a user to complete a second login before access to any report is granted.

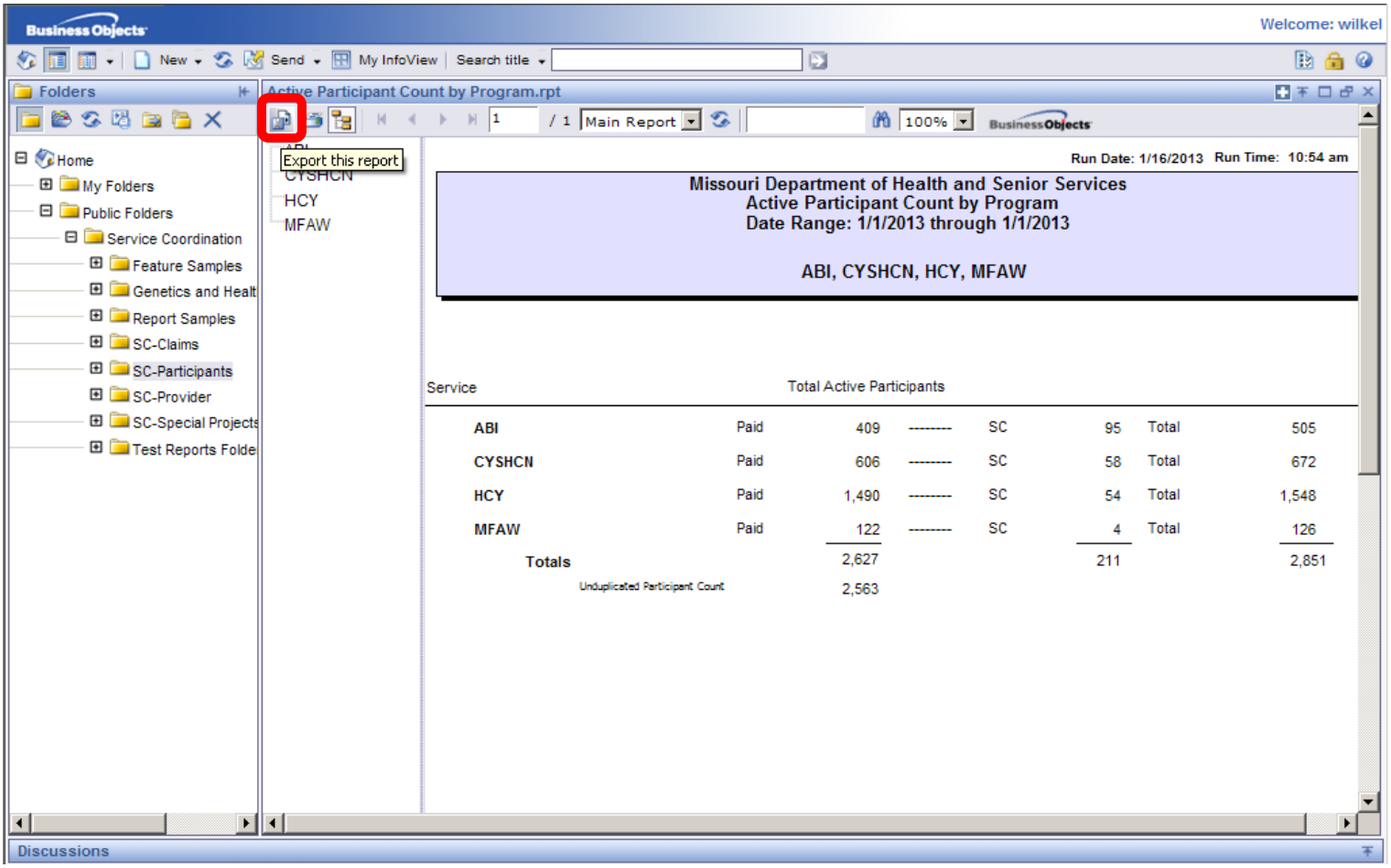
- A user ID is the same user ID used to access the MOHSIAC system, i.e., first five (5) letters of the last name, first letter of the first name (wilkel). If a user's ID contains numbers, those are to be also used (wilkel7).
- The password is a users first and last initials and last four (4) digits of their Social Security Number, i.e., lw7777



Reports –Export (Download) Reports

The Crystal Reports system allows a user to download any report accessed.

With a report display open, select the first icon on the tool bar in the upper left corner of a report window (the link will state 'Export this report' if you hover over the link).



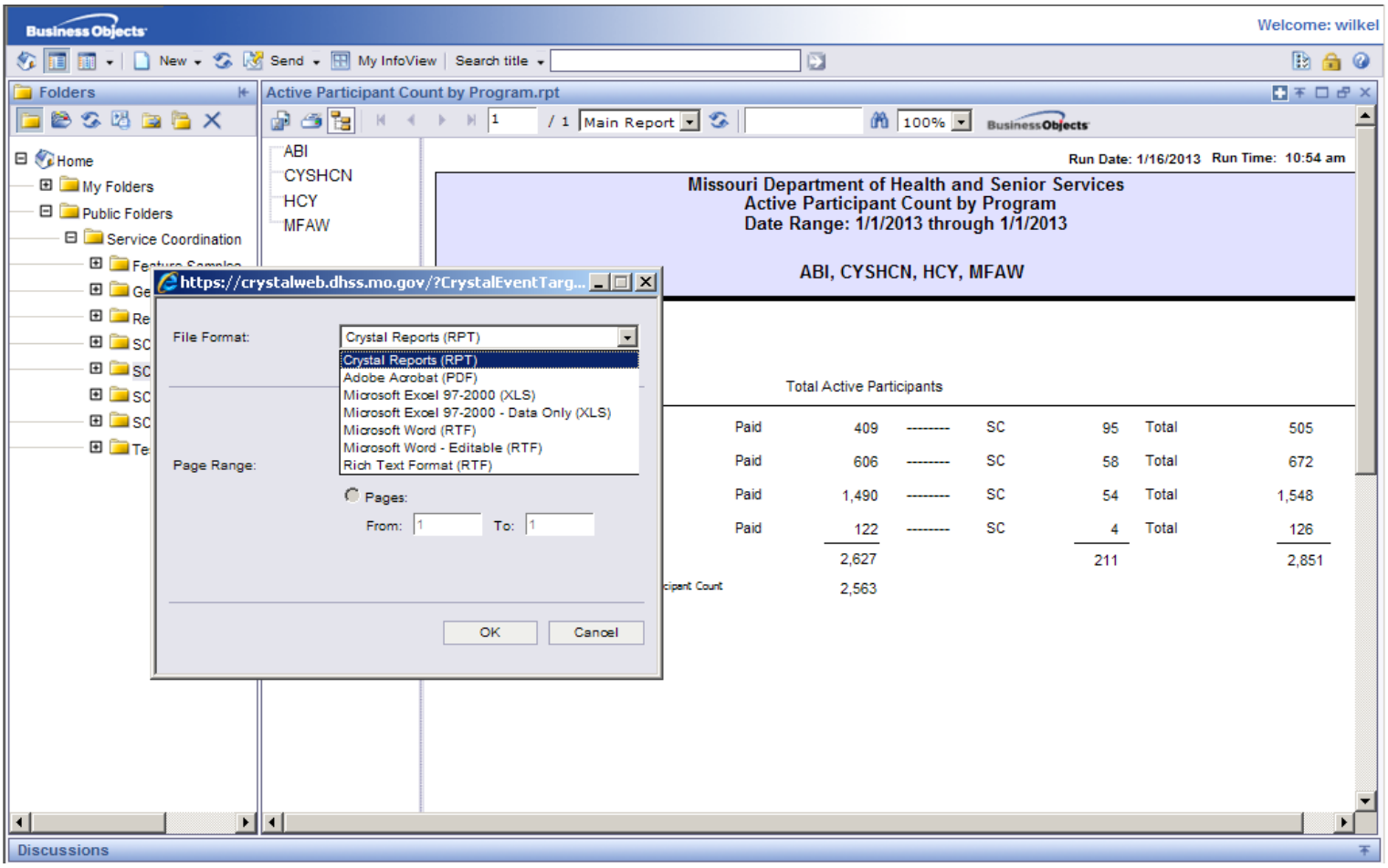
Reports –Export (Download) Report Window

When the Export icon is selected, a separate window will display requiring a user to make specific selections so the downloaded report will be exported appropriately, i.e., using MS Word, MS Excel, Adobe Acrobat, etc.

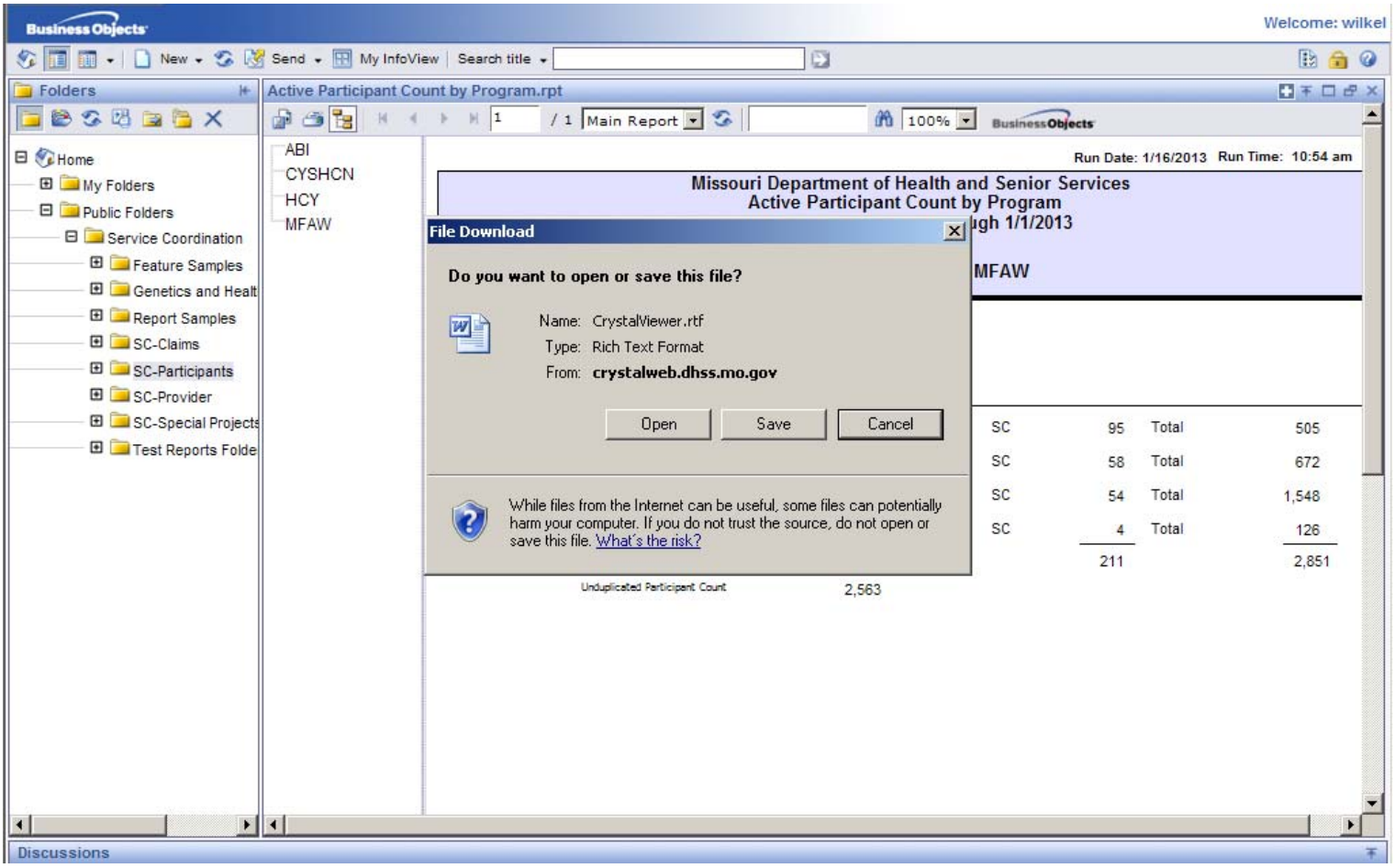
The window also allows a user to select the Page Range, i.e., whole report or certain pages of a report to be exported.

General rules for exporting are:

- Use a MS Word option(s) to download a report into a Word document, i.e., aggregate reports (as shown in the example), AFER Form report, or Caseload reports.
    - The 'editable' option allows a user to change a report after it is downloaded from the Crystal Report system, i.e., change page breaks.
- Use an MS Excel option(s) to download a report into an Excel spreadsheet format, i.e., Master Spreadsheet report.
    - The 'editable' option allows a user to 'filter' or change a report after it is downloaded from the Crystal Report system.
- Use the Adobe Acrobat option to download a report into a PDF format.
    - If a report does not need to be altered in any way, especially if a report needs to be sent as an email attachment.
    - PDF report versions save 'space'; it is a smaller, more compact report download.



Reports –File Download

After selecting the File Format and Page Range for a report download, the Crystal Report system will allow a user to choose if they want to view or save a report.

- Open will display the exported report.
- Save will place the exported report into the selected folder.
- Cancel will discontinue the export process.