# Report Guide

OR PTC DCI

VERSION 2.1

# Report Guide

## Contents

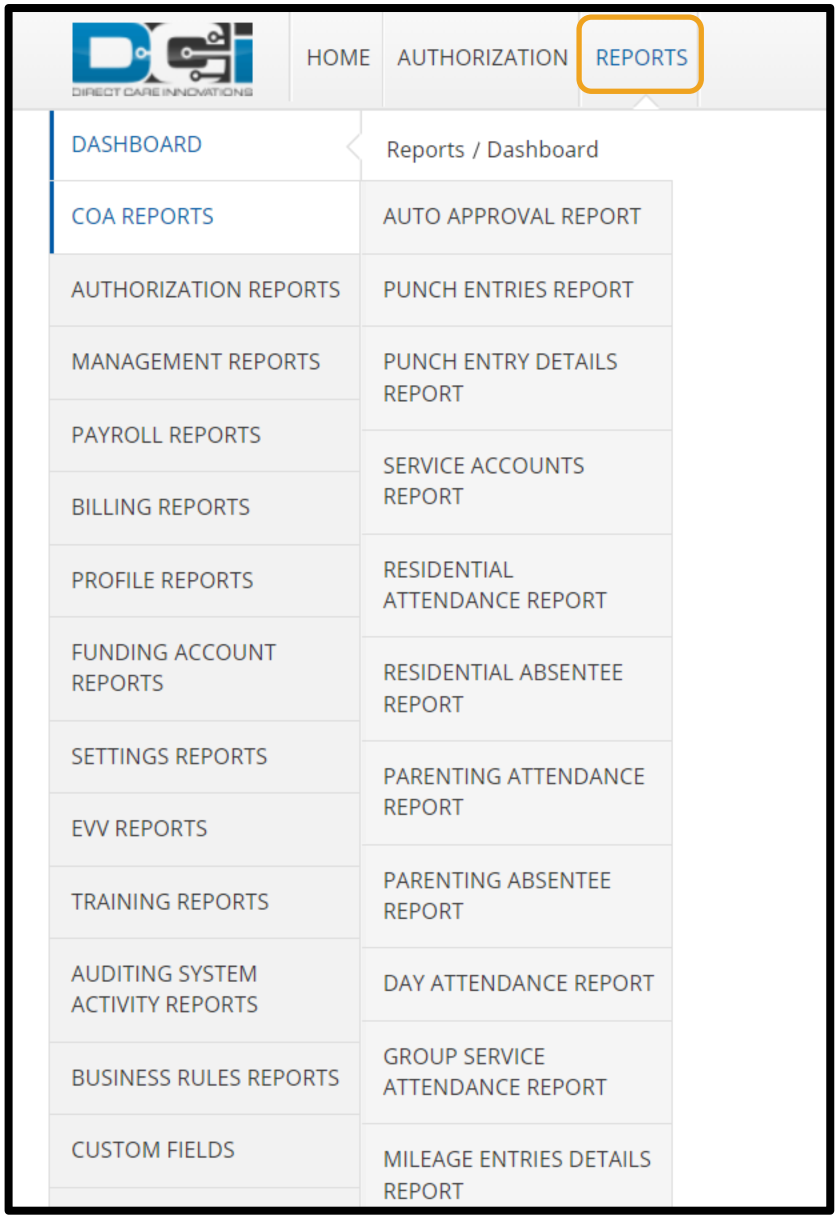
## Disclaimer

The content found in this document is intended for staff using the OR PTC DCI system.

## Canned Reports

The OR PTC DCI Reports Module includes over 80 canned reports and is accessible to State or AAA users. The data in each report is limited to the cost center(s) over which the user has a role. For a full list of all reports available, see Appendix A: Full List of Canned Reports.

**Note**: A canned report is a report that comes standard with the DCI software. Canned reports are valuable because they allow users to gather data pertaining to their cost center.



# Report Guide

Below are examples of information you may want to know and what report you can use to find that information.

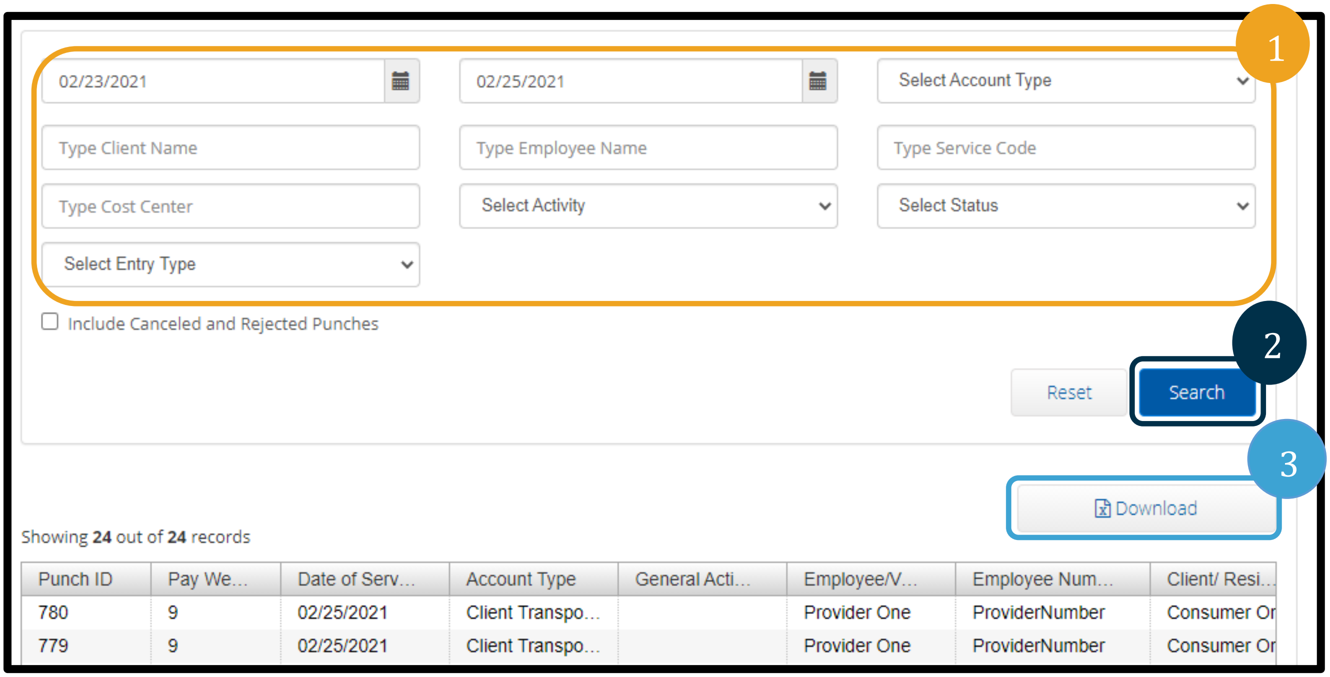
**Note**: COA stands for Chart of Accounts.

| I want to know… | Report Name | Report Location |
|---|---|---|
| How many hours were worked in a Cost Center or by a provider | Punch Entries | COA Reports |
| When State Users entered punches on behalf of the provider | Punch Entry Details or Late Entry Report | COA Reports/Management Reports |
| Who has service accounts for my Cost Center | Service Accounts Report | COA Reports |
| If consumers signed off on punches | Punch Entries | COA Reports |
| Who approved punches and when were they approved | Punch Entry Details | COA Reports |
| If a provider is on track to use all their authorized hours by the end of the pay period | Authorization Run Rate | Authorization Reports |
| If a consumer has active Authorizations | Authorization Entries | Authorization Reports |
| Which authorizations are expiring soon | Expiring Authorizations | Authorization Reports |
| How many hours have been worked against an authorization | Authorization Transactions | Authorization Reports |
| What consumers are assigned to a Cost Center | Client Report | Profile Report |
| What providers are missing an employee number | Employee Report | Profile Report |
| How many hours a provider claimed and the statuses of those entries | Punch Entries Details | COA Reports |

## Canned Reports – How to Search, Filter, and Download

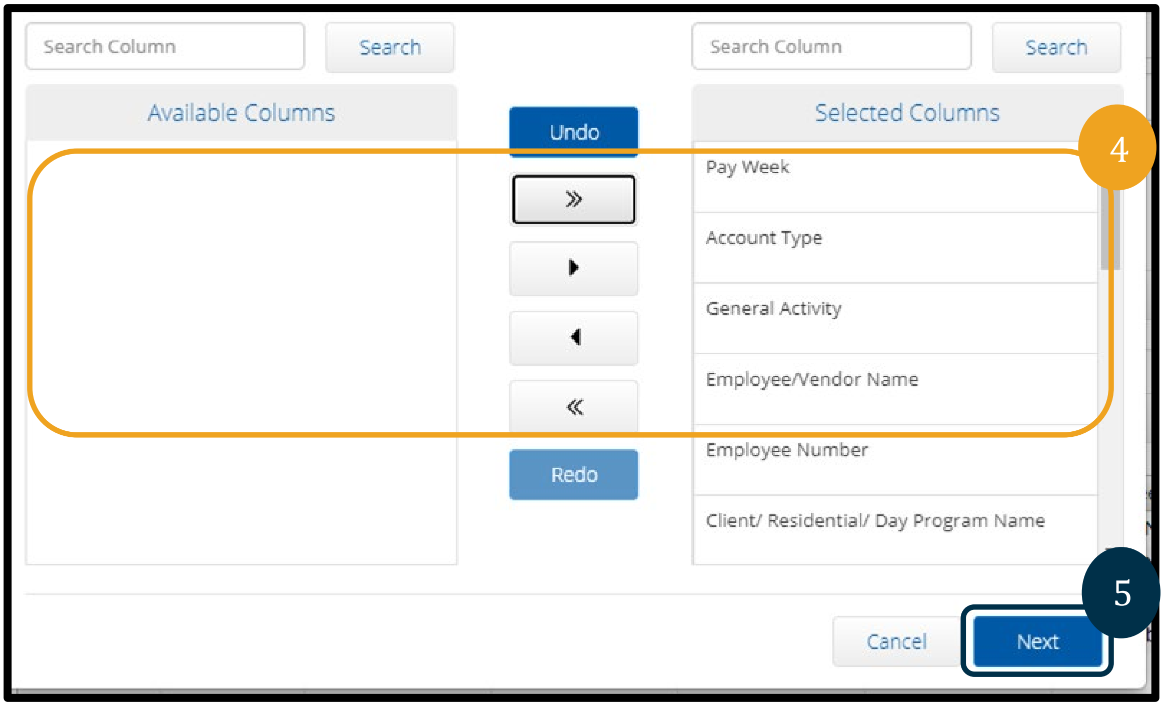
To search for and download a report, after navigating to the appropriate report within the Reports module:

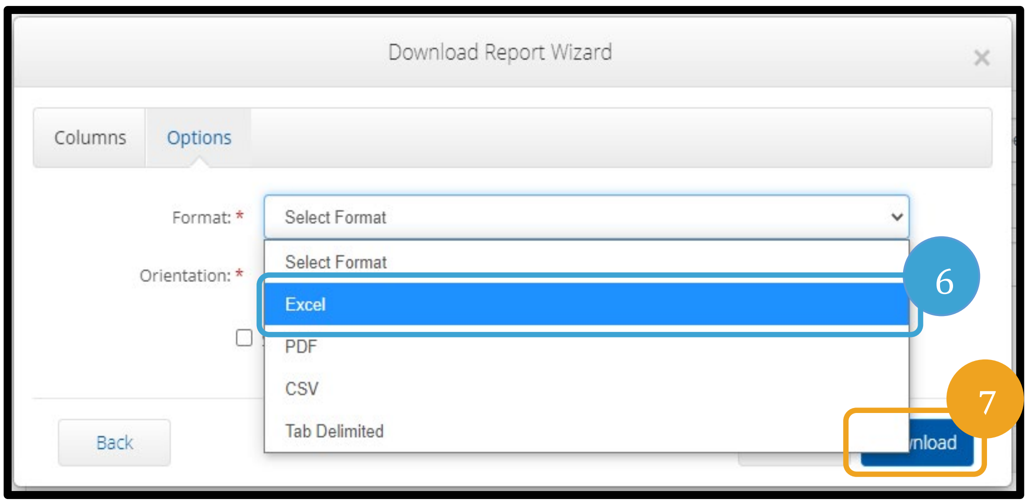
1. Enter search criteria (if you want to narrow the scope of the report).
2. Click Search.
3. Click Download.

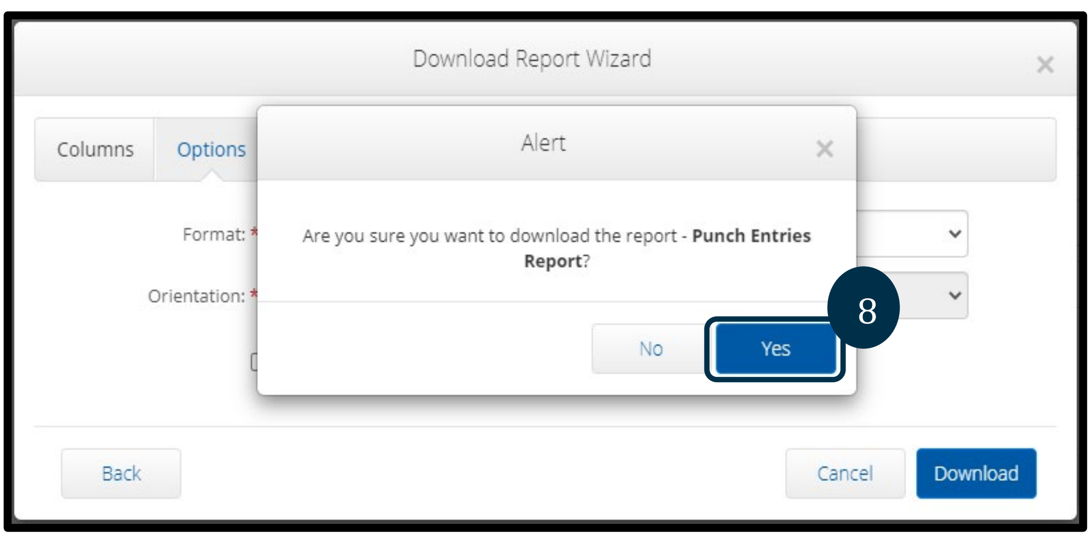



4. Various columns can be included or excluded using the arrow buttons. To include columns in your download:
   a. Click the column title in Available Columns.
   b. Click the right arrow and it will appear in Selected Columns.
   c. If you selected a column you don't want in your downloaded report, click the column in Selected Columns and click the left facing arrow.
   d. To download the report with all available columns, click the double right-facing arrow. The columns in Selected Columns will appear on your download in the order they are listed here. You can also drag columns in Selected Columns to change this order.

5. After selecting the desired columns, click Next.
6. Select a format from the dropdown menu you would like the report downloaded in.
7. Click Download.
8. When the Alert appears, click Yes.



## Canned Report Example

Your report can then be opened in an Excel workbook. For this example, we are using the Notes Report.

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Ge | nployee Number | Pay Rate Name | Pay Rate | Amount | Account Reference | Client/ I | Account Type | Pay Week |
| 2 | | 890123 | Standard | 0.00 | 1.00 | | Kimberl | Hourly | 24 |
| 3 | | 7890123 | Standard | 0.00 | -0.50 | | Kimberl | Hourly | 24 |
| 4 | | 7890123 | Standard | 0.00 | 0.22 | | Kimberl | Hourly | 24 |
| 5 | | 7890123 | Standard | 0.00 | -0.08 | | Kimberl | Hourly | 24 |
| 6 | | UNIID0002 | | 0.00 | 5.00 | | SM Con: | Client Transportation | 24 |
| 7 | | 775123 | | 0.00 | 12.00 | | Robert I | Hourly | 23 |
| 8 | | 775123 | | 0.00 | 12.00 | | Robert I | Hourly | 23 |
| 9 | | 775123 | | 0.00 | 12.00 | | Robert I | Hourly | 23 |
| 10 | | 775123 | | 0.00 | 12.00 | | Robert I | Hourly | 23 |
| 11 | | 775123 | | 0.00 | 12.00 | | Robert I | Hourly | 24 |
| 12 | | 775123 | | 0.00 | 0.38 | | Monica | Hourly | 24 |
| 13 | | 775123 | Standard | 0.00 | -0.40 | | Monica | Hourly | 24 |
| 14 | | 775123 | | 0.00 | 6.50 | | Monica | Hourly | 24 |
| 15 | | 729465 | Standard | 0.00 | 4.00 | | Roman I | Hourly | 24 |
| 16 | | 729465 | Standard | 0.00 | 4.00 | | Roman I | Hourly | 24 |
| 17 | | 745219 | Standard | 0.00 | 1.50 | | Bruce B: | Hourly | 24 |
| 18 | | 745219 | Standard | 0.00 | -2.00 | | Bruce B: | Hourly | 24 |
| 19 | | 729465 | Standard | 0.00 | 0.92 | | Roman I | Hourly | 24 |
| 20 | | 775123 | | 0.00 | 7.00 | | Monica | Hourly | 24 |
| 21 | | 775123 | | | | | | | |
| 22 | | 745219 | Standard | | | | | | |
| 23 | | 7890124 | Standard | | | | | | |

Table1

**Note**: If you select the triangle in the corner to select the whole sheet and double click the divider between any of the columns, Excel will resize to fit the contents.

## Punch Entry Details Report

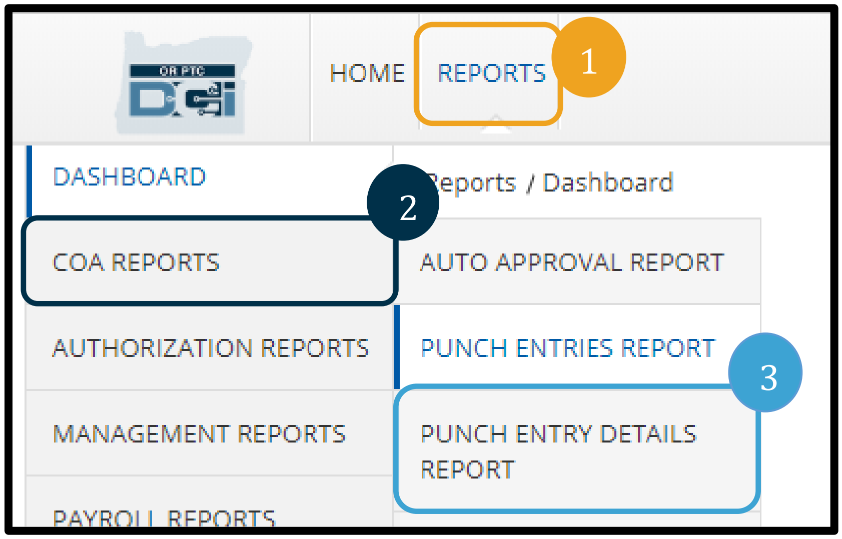
This report is useful for identifying the status of Punch Entries in your Cost Center, which is particularly useful after the end of the pay period.

It is recommended to pull the punch entries report <u>after the pay period has ended</u> so staff can follow up on different punch entries with one of these status options:

- Approved
- Rejected
- Open
- Pending
- Unverified

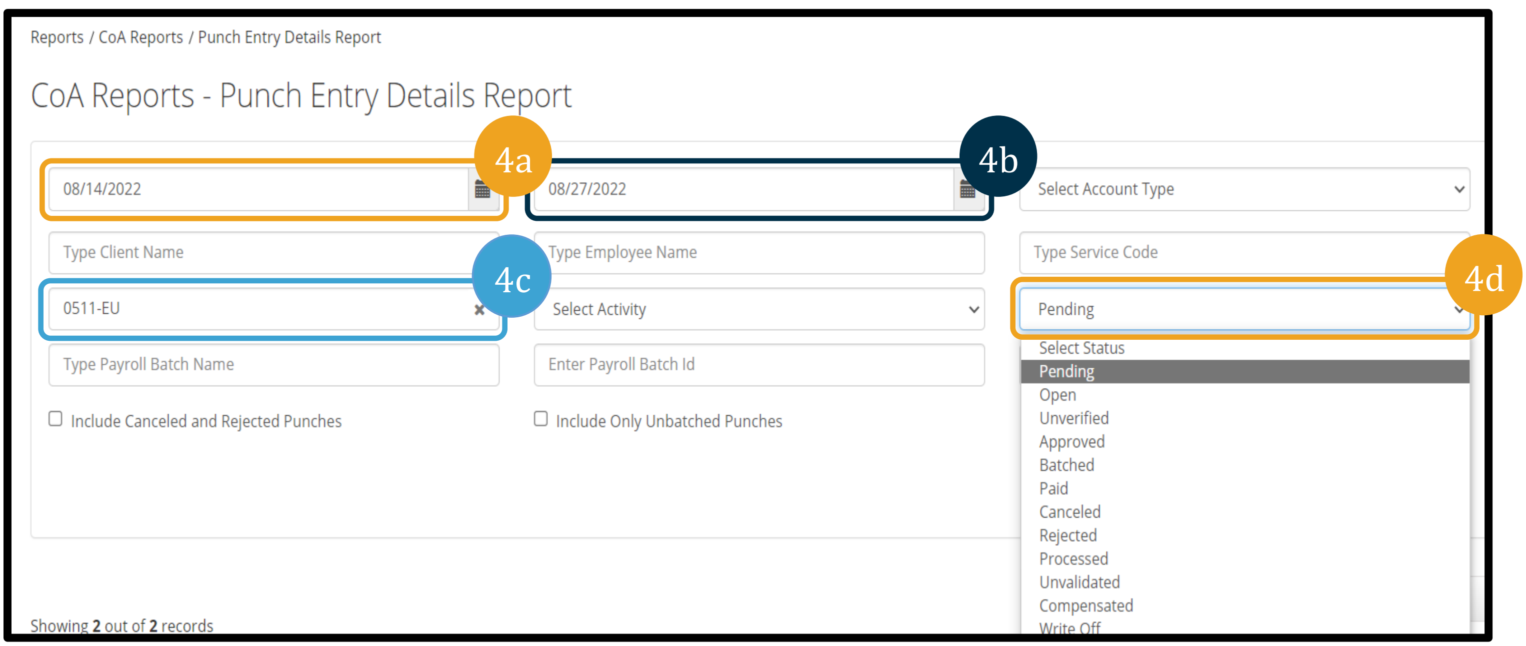
To access the Punch Entry Details Report:

1. Select the Reports tab.
2. On the left sidebar, select COA Reports.
3. Select Punch Entry Details Report.

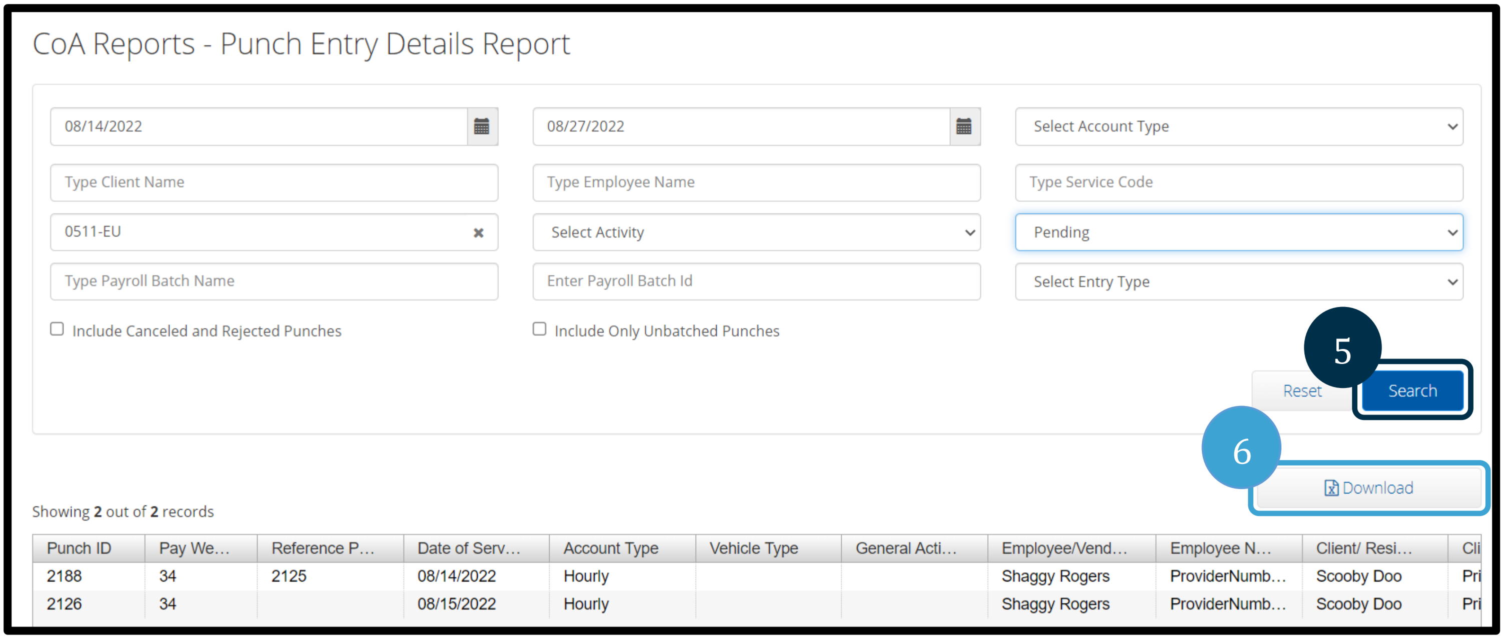



**Note:** This report will show who rejected an entry or entered an entry that went into an Unverified status.

4. Enter your search criteria.
   a. From (MM/DD/YYYY): this should be the start date of the pay period.
   b. To (MM/DD/YYYY): this should be the end date of the pay period.
   c. Cost Center: select the XXXX-**EU** version of the Cost Center (for this example we selected 0511-EU as the Cost Center).
   d. Status: select the status type you are interested in learning more about.
   e. Other search criteria are optional and dependent on your report needs.



5. Click Search.
6. Download the report (see Canned Reports - How to Search, Filter, and Download for more information).



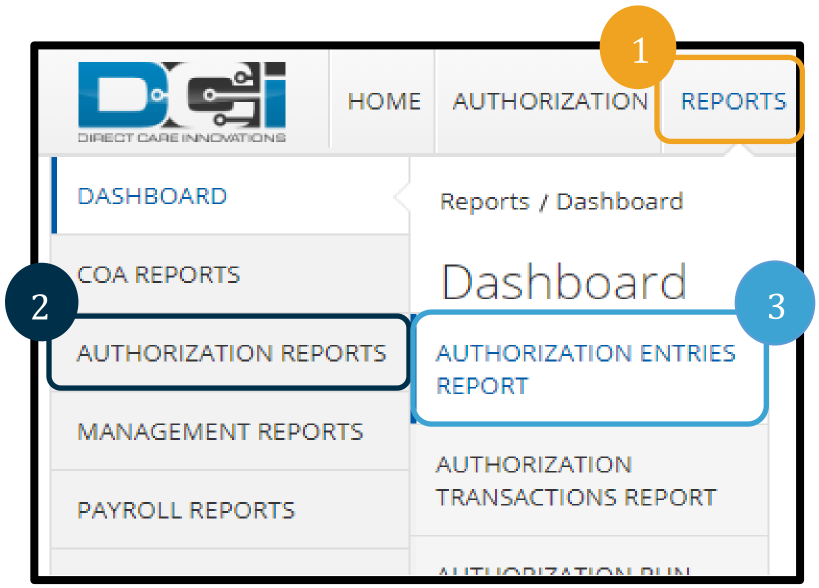

| Punch Entry Report Status | Meaning/Action Needed |
|---|---|
| **Approved** | The local office needs to run a Payroll Batch for the pay period in question. |
| **Rejected** | A staff member, the provider, or the consumer rejected the entry, meaning the entry was not accurate.<br><br>Providers are not notified if a time entry is rejected by a staff member but are notified if it is done by the consumer. |
| **Open** | The provider has clocked in for a shift but has not yet clocked out. |
| **Pending** | An entry waiting for auto-approval to run. |
| **Unverified** | The punch has been either entered or edited by a staff member and must be verified. Unverified entries require action to move on in the process and be paid. Either another staff member or the provider can verify the entry. |

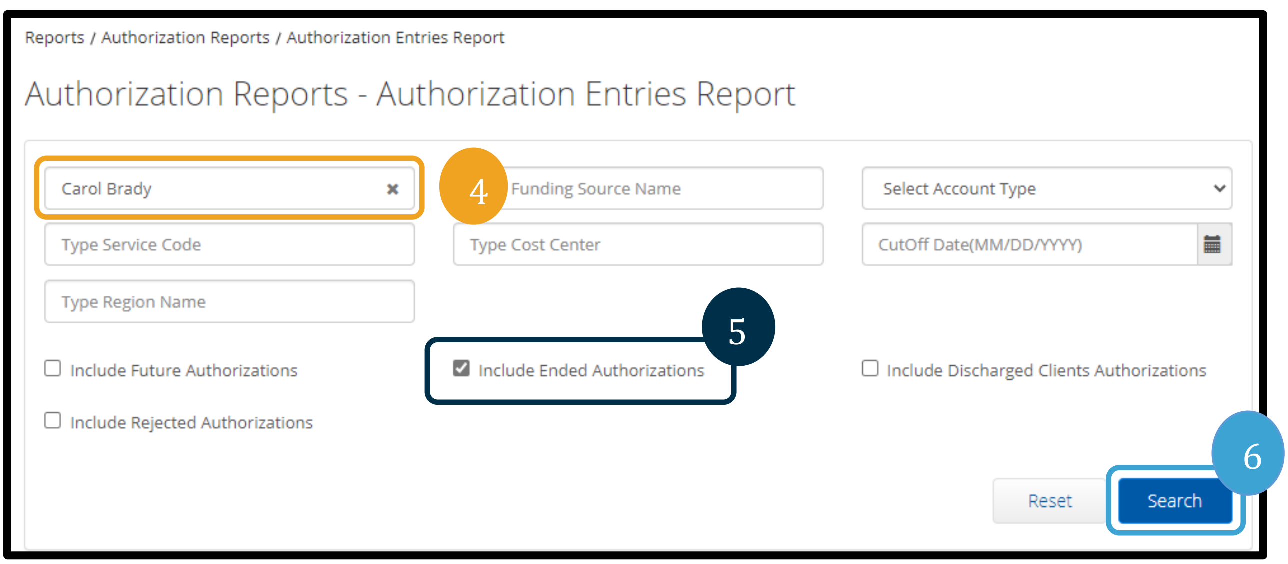
## Authorization Entries Report

This report is useful for looking up authorization information. Any user with a Supervisor role in OR PTC DCI can view/access this report. If you do not have the Authorization Admin permission, you can pull this report to see the initial and remaining balance of an authorization. If you have the Authorization Admin permission, you can view authorizations directly. However, you still may find the Authorization Entries Report useful.

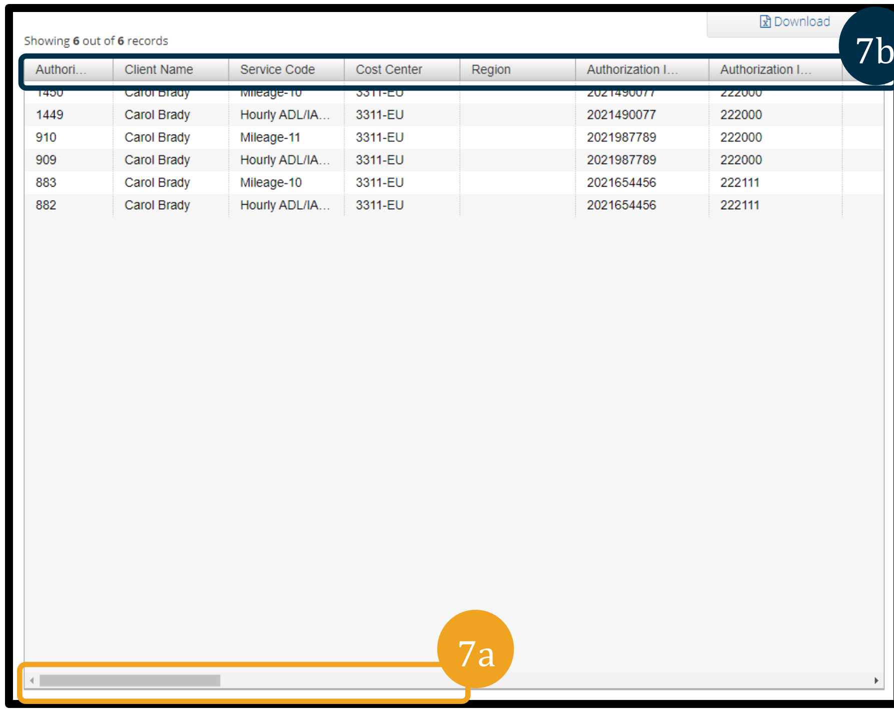
To access the Authorization Entries Report in OR PTC DCI:

1. Click the Reports tab at the top of your screen.
2. On the left sidebar, select Authorization Reports. This will open a secondary menu.
3. Click Authorization Entries Report.
4. Type in the consumer's name and any other search criteria you may want.
5. Check the box next to Include Ended Authorizations.
6. Click Search.



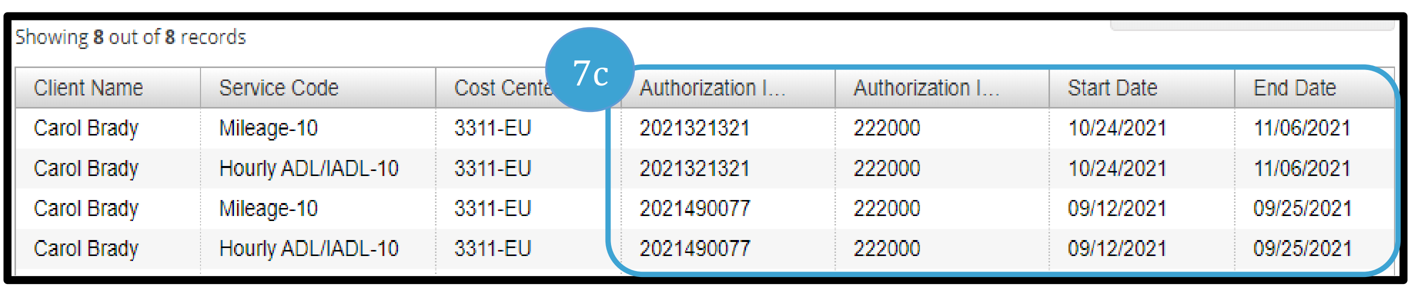



7. You will be taken to your search results. This will display all authorizations for this consumer.
    a. There is a scroll bar at the bottom of the list that allows you to scroll to the right to see more information about each authorization.
    b. You can move the columns left and right by clicking on the header and dragging it. This will allow you to organize the information displayed in the order you prefer. You can also change the width of columns by hovering to the right of the column and dragging to the right.
    c. Key columns you will want to look at to identify authorizations are Authorization ID Reference, Authorization ID Reference 1, Start Date, and End Date.
        - **Authorization ID Reference** shows the voucher number associated with the authorization.
        - **Authorization ID Reference 1** displays the provider number.
        - **Start** and **End Date** refer to the start and end date of the authorization. Unless the provider only worked part of the pay period, these dates will correspond with the pay period the authorization is associated with.


Download
Showing **6** out of **6** records

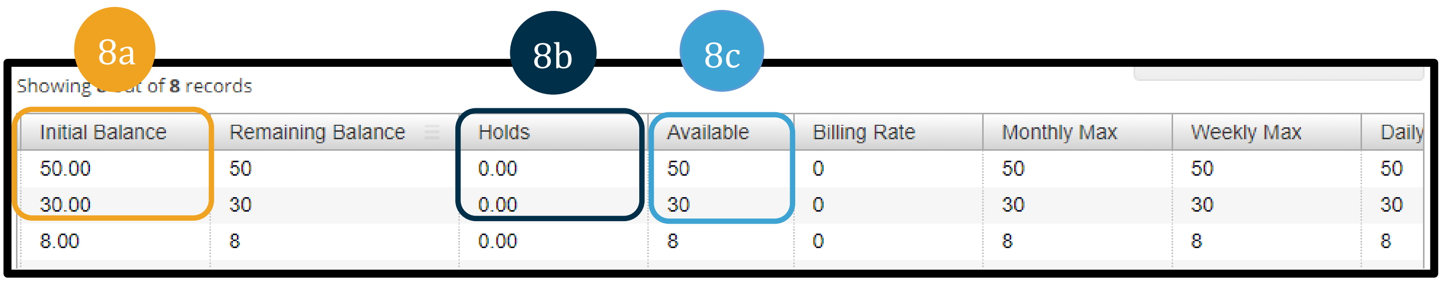
| Authori... | Client Name | Service Code | Cost Center | Region | Authorization I... | Authorization I... |
|---|---|---|---|---|---|---|
| 1450 | Carol Brady | Mileage-10 | 3311-EU | | 2021490077 | 222000 |
| 1449 | Carol Brady | Hourly ADL/IA... | 3311-EU | | 2021490077 | 222000 |
| 910 | Carol Brady | Mileage-11 | 3311-EU | | 2021987789 | 222000 |
| 909 | Carol Brady | Hourly ADL/IA... | 3311-EU | | 2021987789 | 222000 |
| 883 | Carol Brady | Mileage-10 | 3311-EU | | 2021654456 | 222111 |
| 882 | Carol Brady | Hourly ADL/IA... | 3311-EU | | 2021654456 | 222111 |



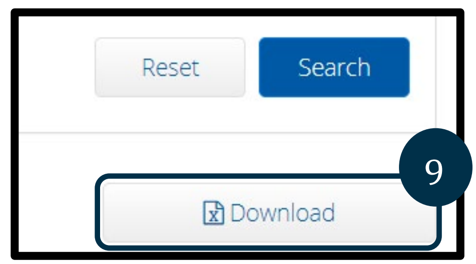

Showing **8** out of **8** records

| Client Name | Service Code | Cost Center | Authorization I... | Authorization I... | Start Date | End Date |
|---|---|---|---|---|---|---|
| Carol Brady | Mileage-10 | 3311-EU | 2021321321 | 222000 | 10/24/2021 | 11/06/2021 |
| Carol Brady | Hourly ADL/IADL-10 | 3311-EU | 2021321321 | 222000 | 10/24/2021 | 11/06/2021 |
| Carol Brady | Mileage-10 | 3311-EU | 2021490077 | 222000 | 09/12/2021 | 09/25/2021 |
| Carol Brady | Hourly ADL/IADL-10 | 3311-EU | 2021490077 | 222000 | 09/12/2021 | 09/25/2021 |

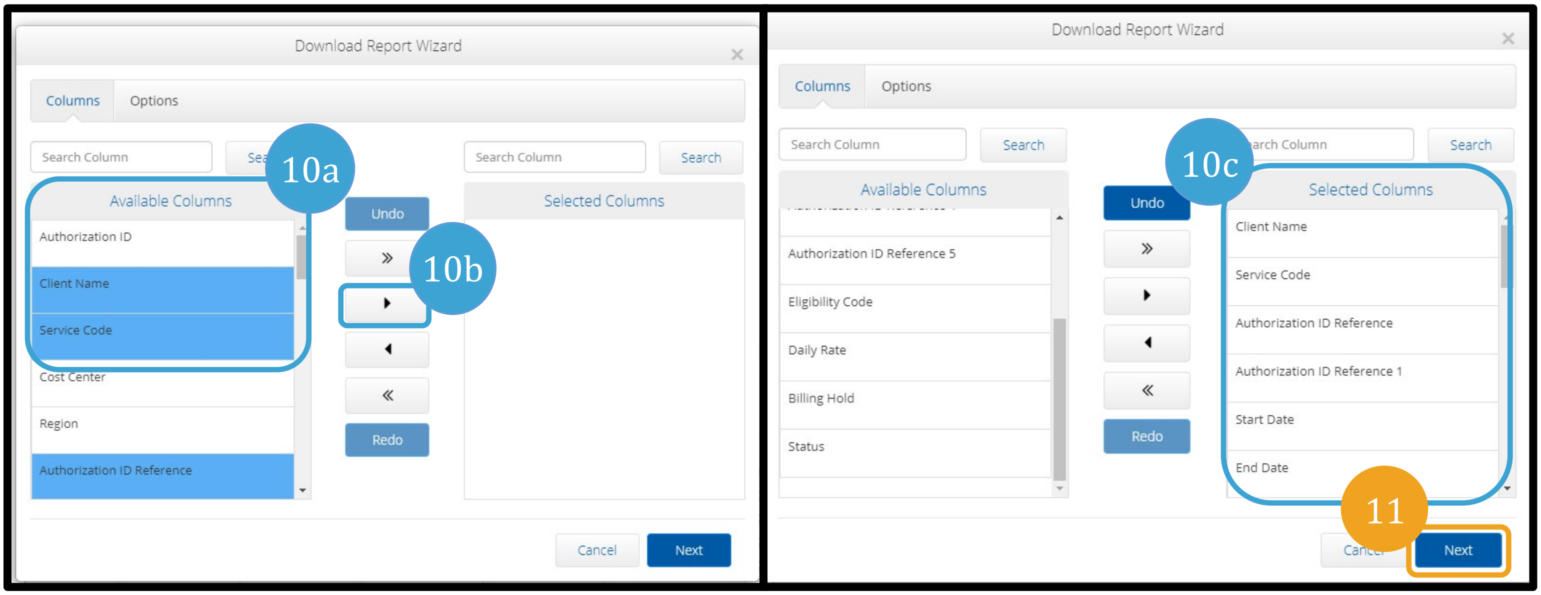
8. If you scroll to the right, you will see columns labeled Initial Balance, Holds, and Available.
    a. The **Initial Balance** column shows the number of hours or miles the provider is authorized to work for this consumer for the dates specified for this authorization.
    b. The **Holds** column shows how many hours or miles are in a pending status for this authorization.
    c. The **Available** column displays how many hours or miles the provider can still claim against this authorization. This considers all pending entries. If this column shows 0, the provider has claimed all their authorized hours or miles.



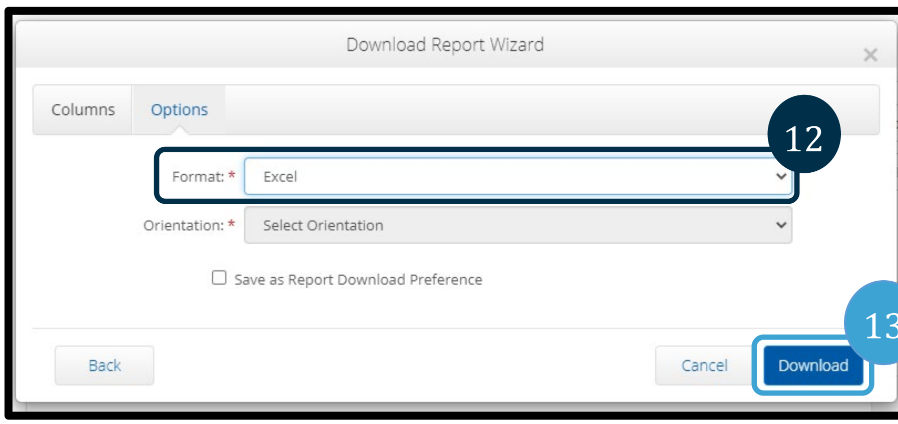

You can download this report if you would like to view it in Excel, PDF, or Google Sheets. For the following steps, we will download to Excel, but the steps are the same for the other formats.



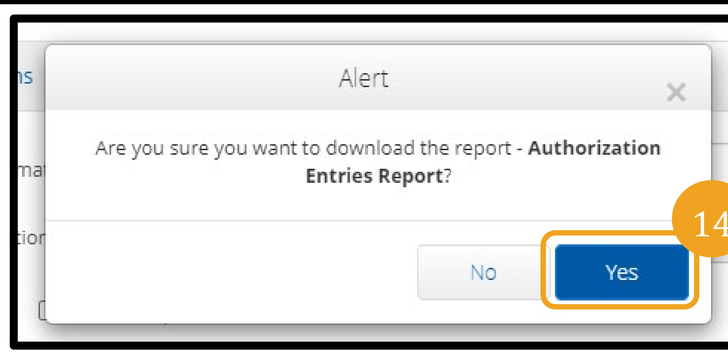

9. Click Download.
10. The Download Report Wizard will appear.
    a. Click the columns on the left you wish to include in your downloaded version.
    b. Following each selection from the left column, click the right-facing arrow to add the column you clicked to the Selected Columns list.
    c. The Selected Columns list will display all columns that will download in your report. If it is not included in the Selected Columns, it will not appear on your downloaded report. Once you download the report, the columns will display in the order they are listed in the Selected Columns. This means the top column header in Selected Columns will be the left column on the downloaded report. You can change this order by dragging items in the Selected Columns up or down.
11. Click Next.

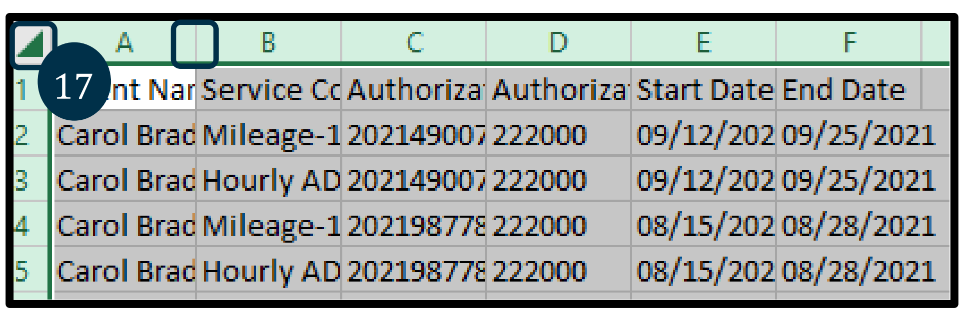



12. Select your desired report format from the dropdown menu next to Format.
13. Click Download.
14. Select Yes.
15. Open the download. It may appear in the bottom left corner or top right depending on your web browser settings.




16. Once you click to open the file, you will want to format it so it is easier to read.
17. To widen the columns, click the green arrow in the left corner of the spreadsheet. Then with your cursor, hover between any two columns and double click.

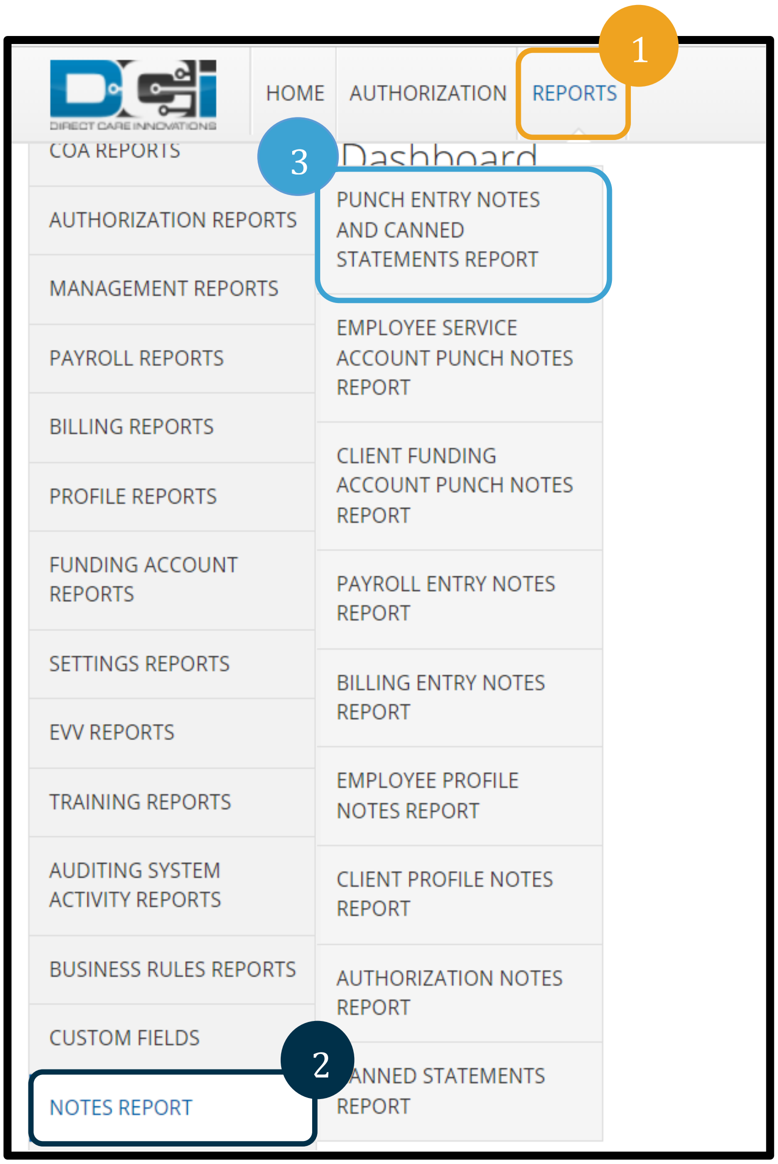


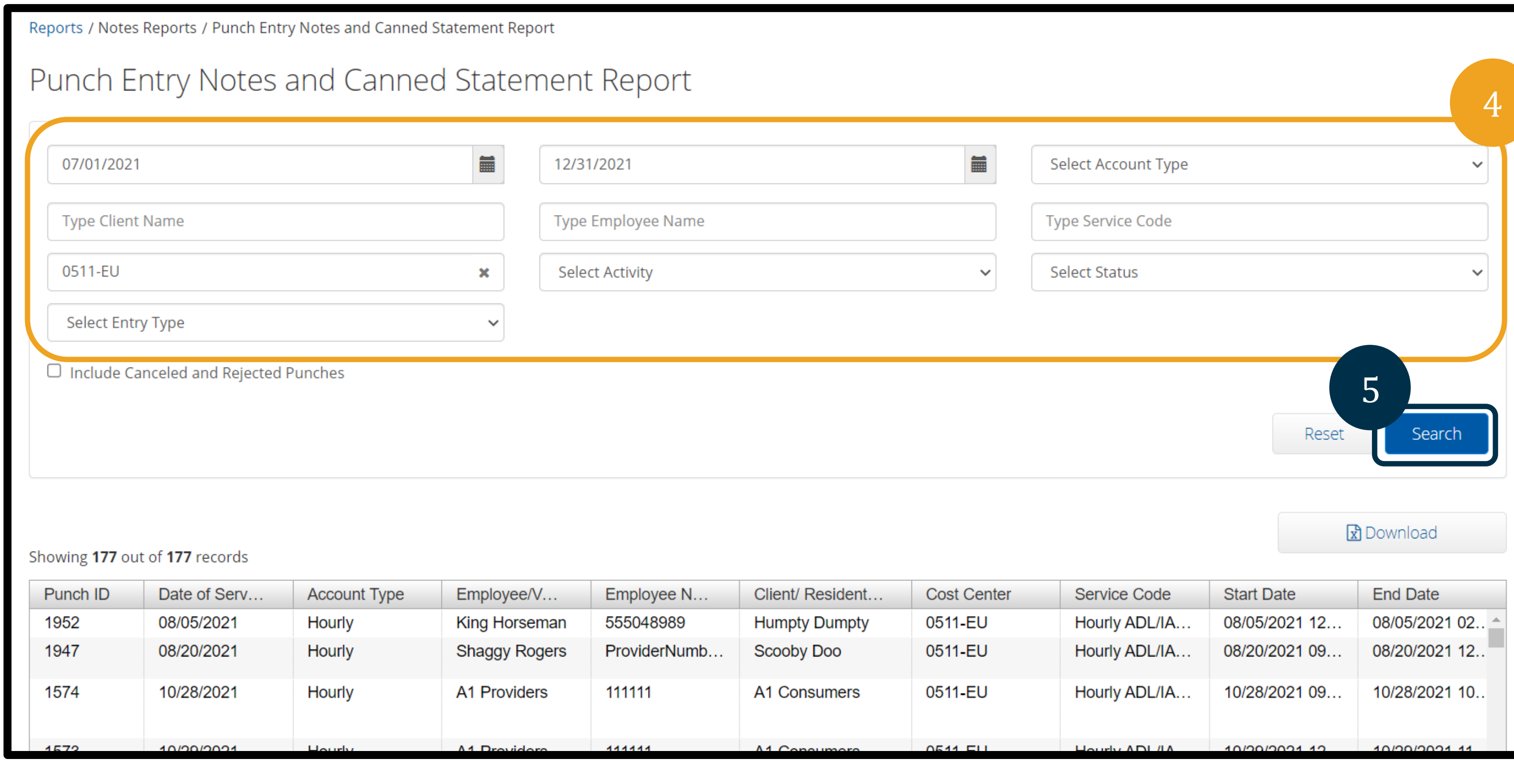
## Notes Report

When time allows, please pull this report to view comments left by providers on their entries. To run a notes report, follow these steps after logging into OR PTC DCI:

1. Click Reports.
2. Click Notes Report.
3. Click on Punch Entry Notes and Canned Statements Report.



4. Use the search fields to enter any search criteria you wish to filter your report by. In this example, we entered a date range. Also note, there are options listed below the search criteria, such as Include Canceled and Rejected Punches, that you may wish to use.
5. Click Search.




6. Your report will be displayed. If you wish to format this or download the report and format in Excel, follow the steps to download a report in <u>Canned Reports - How to Search and Download</u> beginning at step 4.

For an example of the Notes Report, see <u>Canned Report Example</u>.

## Custom Reports

Acumen has also developed custom reports for the Agency upon request. A custom report can be sent once or on a recurring schedule. Custom reports are delivered to the recipient through the OR PTC DCI Messaging Module. The Agency has two custom reports:

1. **Notifications Report (sent upon request)**
    - This report provides a list of all system generated notifications, using DCI Message Templates, sent to a specific user (consumer, provider, or consumer-employer representative (CER)) within a given timeframe. This includes the message and date and time it was sent.

2. **Changed Email/Phone Number Report (sent once per month)**
    - This report includes a list of external users (consumers, providers, and CERs) whose email address or phone number was changed in the prior month under a specific cost center.

## Notifications Report

State Users can request this report for a specific provider by submitting an email request to OHCC Customer Relations, OHCC.CustomerRelations@odhsoha.oregon.gov.

**The request needs to include:**

- Requestor name and OR# or P#.
- Explanation of why the report is being requested.
- The date range of notifications being requested (start date and end date).
- Either the Uni ID or the Provider Number of the provider who received the notifications.
- The name of the Message Template(s) included in the request. Or the requestor may simply state "All."
- Program Name(s): Requestor should state APD, AMH Behavioral Health, or both.

Here is an example of what the Notifications Report will look like. This will be sent to the Agency upon request.

| | |
|---|---|
| Start Date: | 1/25/2021 |
| End Date: | 1/31/2021 |
| Uni ID: | UI5555555 |
| Provider Number: | Must provide UNI ID or Provider Number |
| Message Template Name: | Password Reset, Password Changed |
| Program Name(s): | Must state which program or programs (i.e. APD) |
| Provider Name: | Provider Five |

| Program Name | Service Code | Service Name | Consumer Name | Consumer Prime | Provider Number | Message Template Name | Date Sent | Time Sent | Email | Text | Message | Message Opened | Opened Da |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | 456123,555555 | Password Changed | 2021-01-26 | 7:06:35 PM | Yes | Yes | Yes | No | |
| | | | | | 456123,555555 | Password Reset | 2021-01-26 | 7:15:42 PM | Yes | No | Yes | No | |
| | | | | | 456123,555555 | Password Changed | 2021-01-28 | 1:17:37 AM | Yes | Yes | Yes | No | |

## Changed Email/Phone Report

Here is an example of the Changed Email/Phone Number Report. This will be sent to those identified by each office each month. State Users will utilize this report to identify when a provider, consumer, or CER has updated their email or phone number. They will then take appropriate actions specified in business processes 1.2.3 Manage Provider Accounts – Update Provider Information, 1.3.2 Update Consumer Information, and 1.4.2 Update Consumer Employer Representative Information.

| | |
|---|---|
| **Month:** | Feb-21 |
| **Branch:** | 3412 - EU |

| User Name | Profile Type | Prime/UnilD | Provider Number | Old Email Address | New Email Address |
|---|---|---|---|---|---|
| Test Provider | Employee | 123456 | 456789 | | |
| Provider Ten | Employee | UI0000000 | 123456 | | |
| Provider Six | Employee | UI6666666 | 555555,666666 | | |
| Provider Four | Employee | UI4444444 | 444444,OR1212122 | | |
| Consumer Three | Client | AZ222222 | | | |
| Test Guardian | Guardian | | | | |

| Old Aternate Phone | New Alternate Phone | Old Mobile Phone | New Mobile Phone |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

| Changed Date | Changed Time | Changed By Name | Changed By Employee Number |
|---|---|---|---|
| March 18, 2021 | 3:09:29 PM | Case Manager | 123456 |
| March 2, 2021 | 11:12:25 PM | DCI Implementation | UI0000000 |
| February 9, 2021 | 2:55:09 PM | David Rudolph | UI6666666 |

# Appendix A: Full List of Canned Reports

- COA Reports
    - Auto Approval Report
    - Punch Entries Report
    - Punch Entry Details Report
    - Service Accounts Report
    - Residential Attendance Report
    - Residential Absentee Report
    - Parenting Attendance Report
    - Parenting Absentee Report
    - Day Attendance Report
    - Group Service Attendance Report
    - Mileage Entries Details Report
    - Low Accuracy Device Report

  - Void Pre-Action Report
  - Time Card Report
  - Reason Code Report
- Authorization Reports
  - Authorization Entries Report
  - Authorization Transactions Report
  - Authorization Run Rate Report
  - Expiring Authorization Report
- Management Reports
  - Punch Entry Overtime Report
  - Punch Entry Authorization Violation Report
  - Late Punch Entry Report
  - Client Approval Bypassed Punch Entry Report
  - Late Punch Entry Approval Report
  - Pay Week Hours Report
  - Pay Week Total Hours Report
  - Unbillable Entries Report
  - Compensating Entries Report
  - Total Daily Hours Report
  - Voided Entries Report
  - Employee Pay Rates Report
- Payroll Reports
  - Payroll Batch Details Report
  - Total Hours by Month Report
  - Check Details Report
- Billing Reports
  - Billing Batch Details Report
  - Billing Register Report
  - Residential Billing Absentee Report
  - Parenting Billing Absentee Report
  - Billing Entry Authorization Max Violation Report
  - Rollups Report
  - Rollups Detail Report
  - Payback Rebill Report
  - Billing Batch Payroll Results Report
  - Write-Off Detail Report
  - Billing Batch EDI Details Report
  - Billing Batch Reason Code Report

- Profile Reports
    - Employees Report
    - Roles Report
    - Clients Report
    - Residential Programs Report
    - Day Programs
    - Parenting Programs Report
    - Group Services Report
    - Guardians Report
    - Case Workers Report
    - Vendors Report
- Funding Account Reports
    - Funding Accounts Report
    - Funding Account Entries Report
- Settings Reports
    - Cost Center Report
    - Funding Sources Report
    - Service Codes Report
    - Service Code Groups Report
    - Regions Report
- EVV Reports
    - EVV Entries Report
    - Geofence Report
    - EVV Phone Report
    - FOB Report
    - Portal Sign Off Report
- Care Management Reports
    - Pending Care Notes Report
    - Task Result Details Report
    - Raw Data Dump Report
    - Client Diagnosis Report
    - Diagnosis Code Usage Report
- Scheduling Reports
    - Employee Schedule Report
    - Client Schedule Report
    - Day Program Schedule Report
    - Residential Program Schedule Report
    - Group Service Schedule Report

    - Missed Shift Report
- Training Reports
    - Employee Training Certification Report
    - Employee Training Certification Details Report
    - Service Code Certification Requirements Report
    - Service Code Certification Templates Report
    - Certification Templates Report
    - Certification Templates Association Report
    - Certification Requirements Report
    - Certification Requirements Associations Report
    - Expiring Training Certification Report
    - Employee Required Trainings Report
    - Employee Certification Requirements Linkage Report
- Auditing System Activity Reports
    - Login Report
    - Profile Event Report
- Business Rules Reports
    - Business Rules Settings Report
    - Business Rules Result Report
- Summary Report
    - Summary Report
- Custom Fields Reports
    - Custom Field Definitions Report
    - Custom Field Values Report
- Notes Reports
    - Punch Entry Notes and Canned Statements Report
    - Employee Service Account Punch Notes Report
    - Client Funding Account Punch Notes Report
    - Payroll Entry Notes Report
    - Billing Entry Notes Report
    - Employee Profile Notes Report
    - Client Profile Notes Report
    - Authorization Notes Report
    - Canned Statements Report