

ACCESSING OBQI & OBQM REPORTS

USING THE CASPER REPORTING SYSTEM

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To access OBQI & OBQM Reports:

1. Access the CMS OASIS System in your state. (Figure 1.)
2. Select the HHA OBQI & OBQM Reports link.

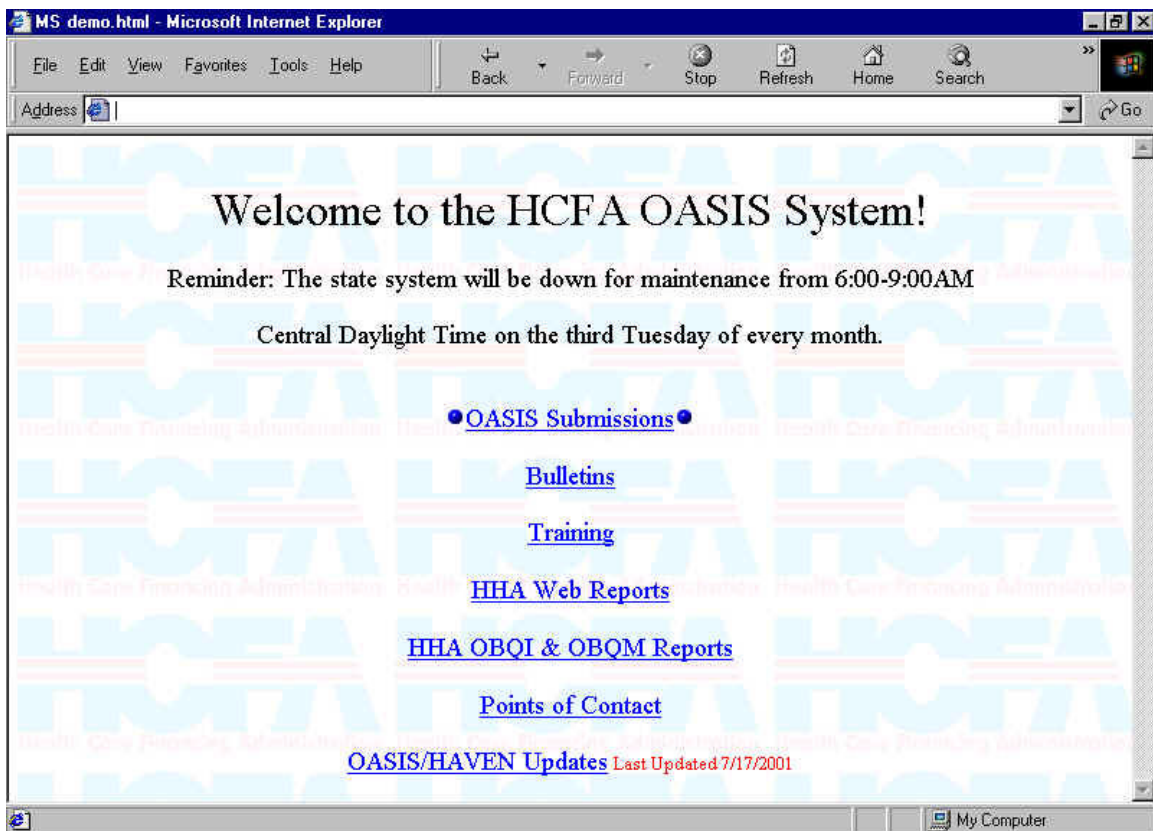


Figure 1. CMS OASIS System—Welcome Page

3. The OBQI & OBQM Online Reports page will display. If you are a first-time user **and using a Netscape browser**, select the [Datawindow Report Viewer Plug-in](#) link. If you are using Internet Explorer, this step is NOT required and you may skip to #6 on page 4. (Figure 2.)

NOTE: This is an updated version of the plug-in that was previously used when accessing the OBQM Reports application. This new version is required for Netscape users in order to view your OBQI & OBQM Reports in the new CASPER Reporting application.

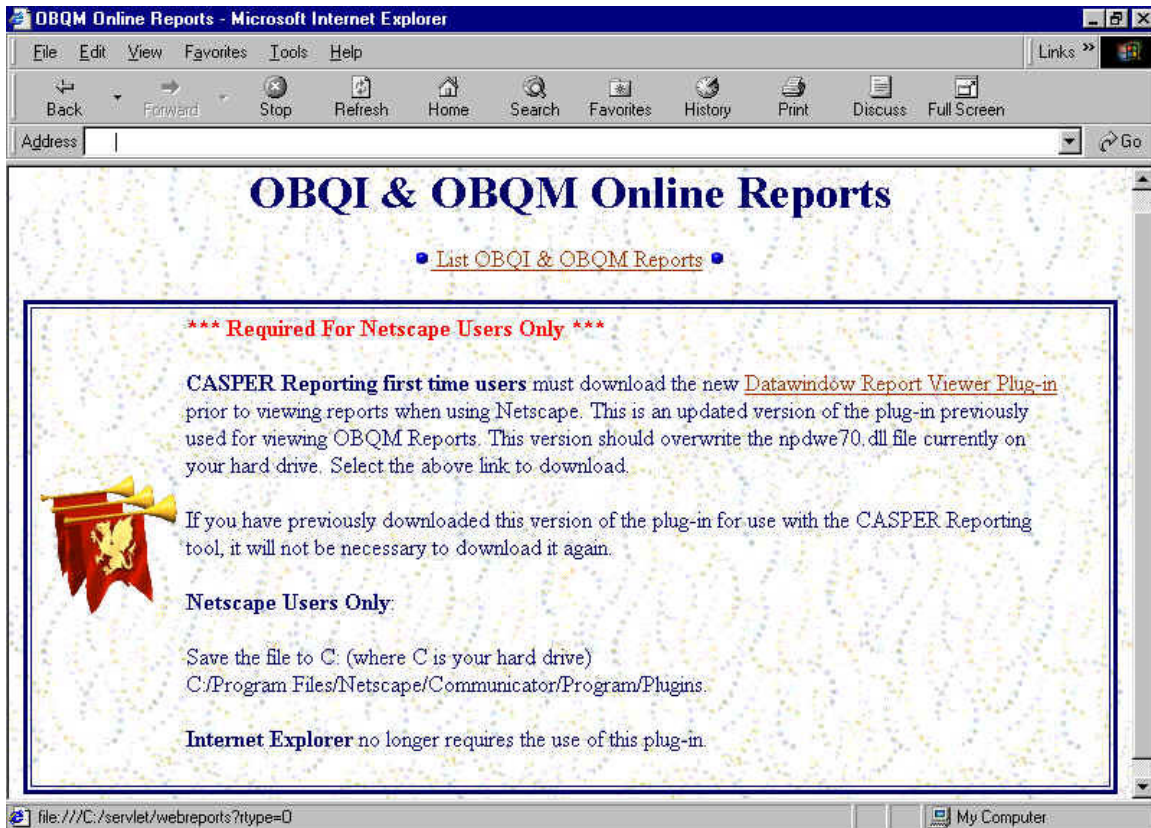


Figure 2. OBQI & OBQM Online Reports Page

4. For those Netscape users that select the plug-in link, a Save As box will display. (Figure 3.)

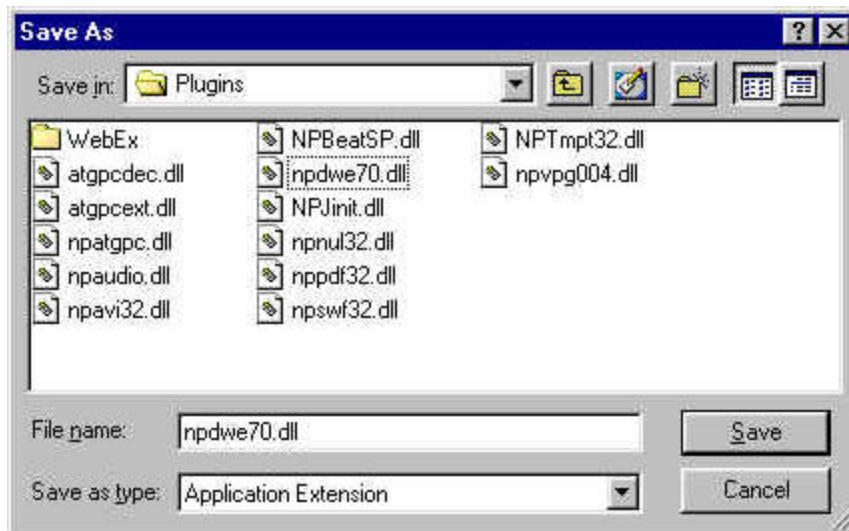


Figure 3. Save As Box

If you are using **Netscape**:

Save the file to C: (where C is your hard drive)
C:/ProgramFiles/Netscape/Communicator/Program/Plugins.

If you are using **Internet Explorer**:

This plug-in is no longer needed for use with Internet Explorer. You will be prompted to download an Active X plug-in the first time you view a report in the CASPER Reporting application. That process is completely automated. The only action required of the user is to select the OK or ACCEPT button when prompted to download the Active X plug-in.

5. After saving the plug-in, you will return to the OBQI & OBQM Online Reports page. (Figure 2.)

6. Select the List OBQI & OBQM Reports link.
7. The CASPER Home page will display. (Figure 4.)

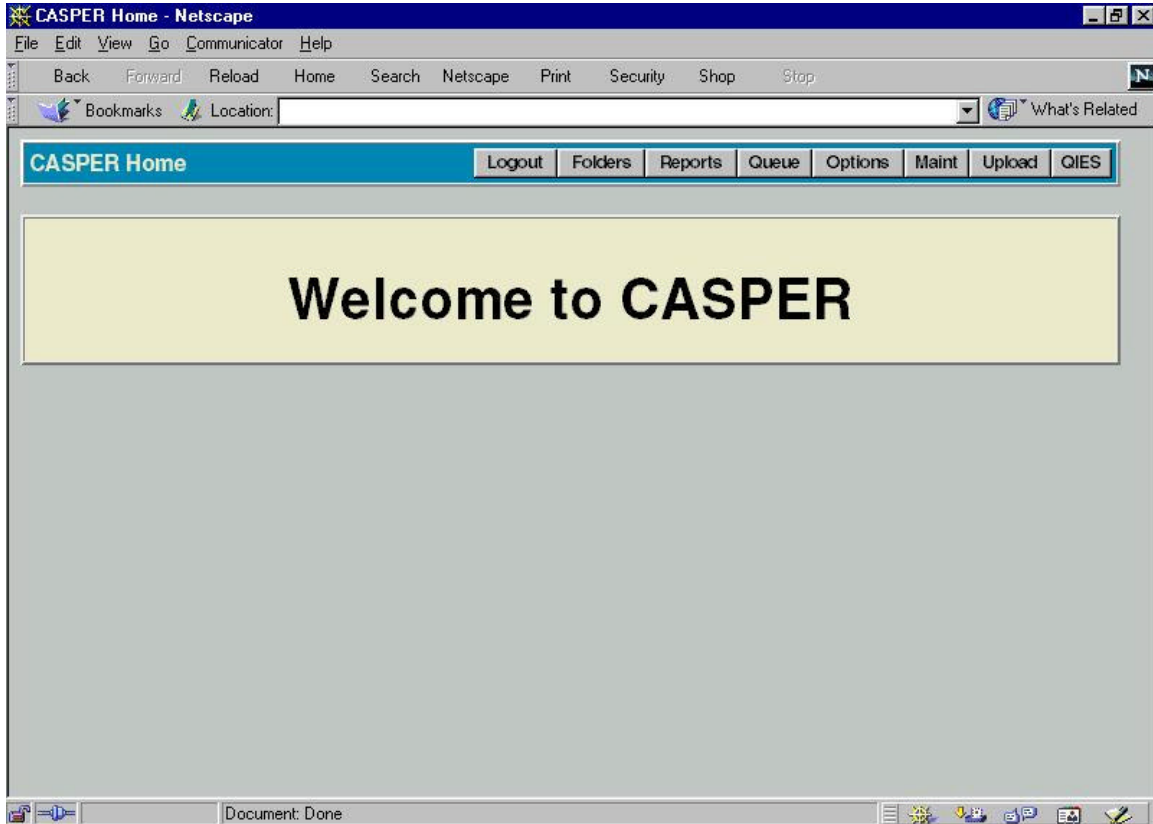


Figure 4. CASPER Home Page

8. To enter the CASPER Reporting application, select either the Folders button or the Reports button in the CASPER menu bar.

NOTE: If using the Folders button, you will enter the CASPER Reporting application on the page where previously requested reports are stored. If using the Reports button, you will enter the CASPER Reporting application on the page that allows you to select and request reports.

9. The CASPER Login page will display. Enter your login information in the appropriate fields. The Name and Password are the same that are used when submitting OASIS data. (Figure 5.)

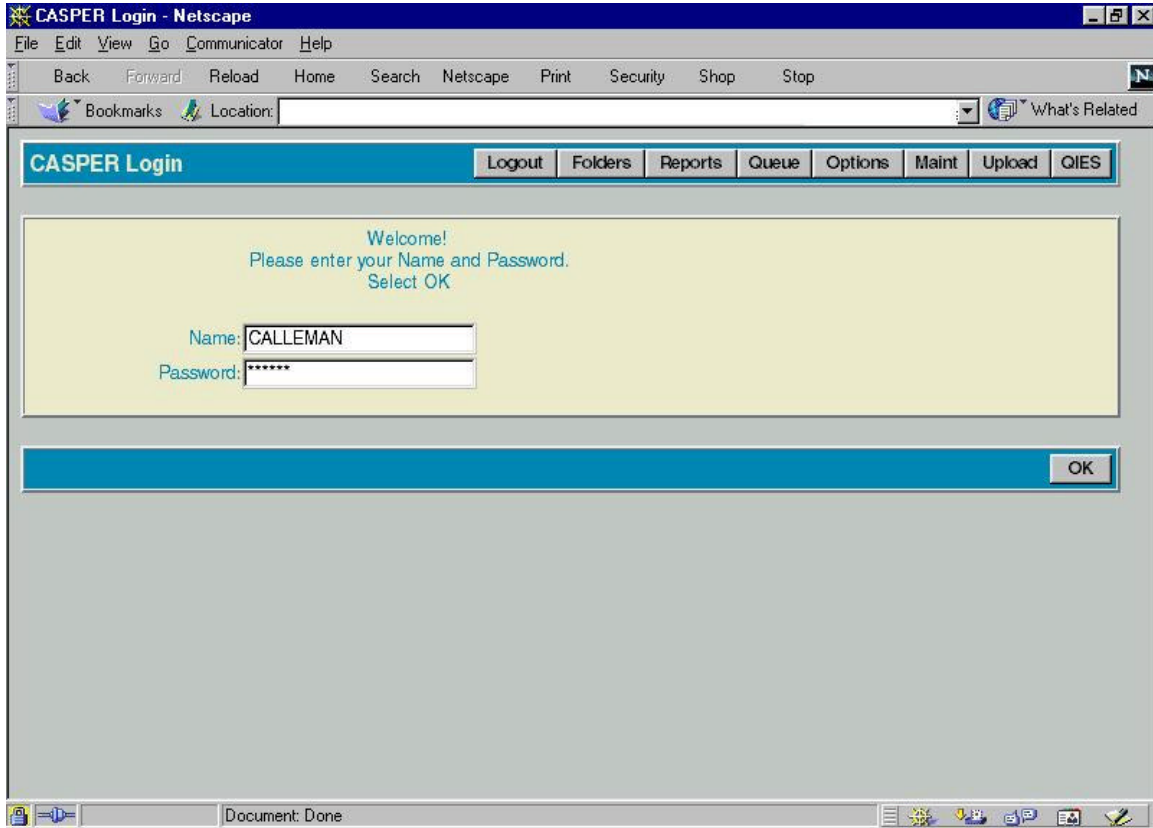


Figure 5. CASPER Login Page

REQUESTING OBQI REPORTS

1. To request reports, enter the CASPER Reports page by selecting the Reports button in the CASPER menu bar. The Report Categories section displays the various report groups that are available. The section on the right displays the reports that are contained in the selected report group. (Figure 6.)

NOTE: For the purposes of this guide, the OBQI Reports will be demonstrated. The procedure for requesting the OBQM Reports is similar.

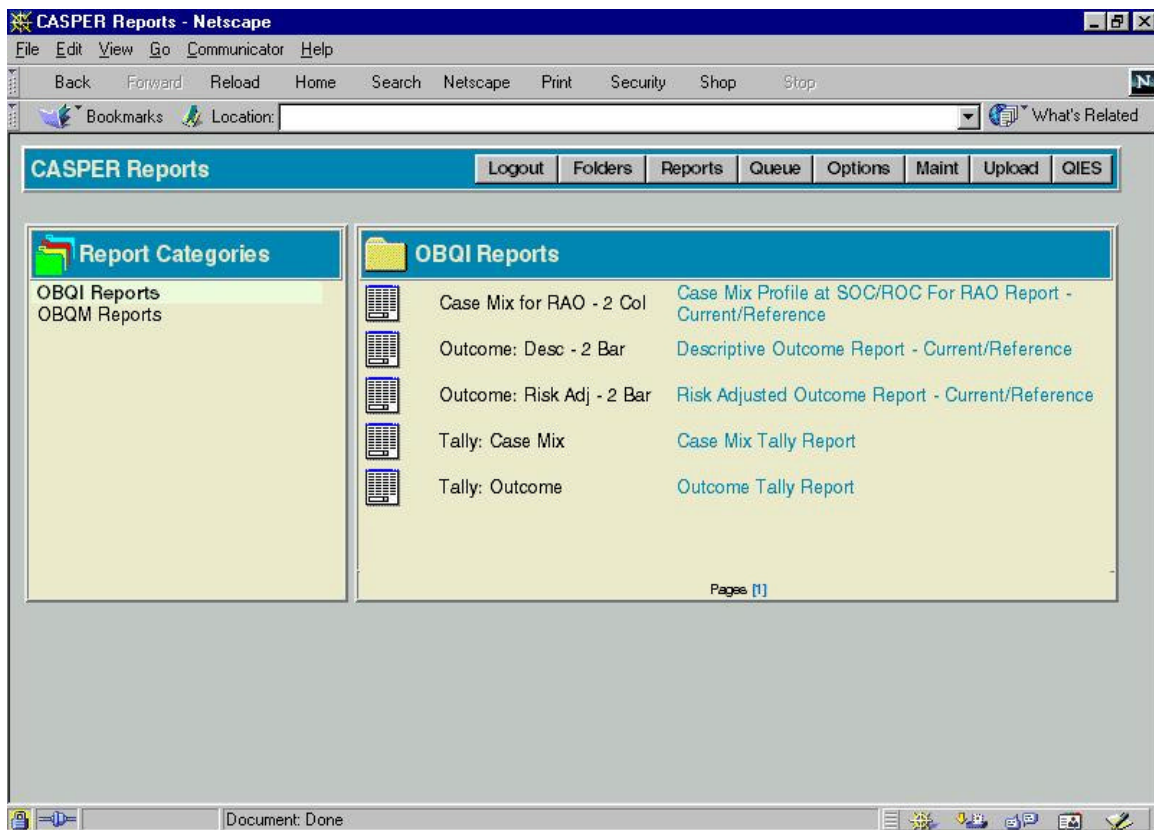


Figure 6. CASPER Reports Page

2. To request a specific report, select the abbreviated report name. These are displayed in black text.

3. The CASPER Reports Submit page will display.
(Figure 7.)

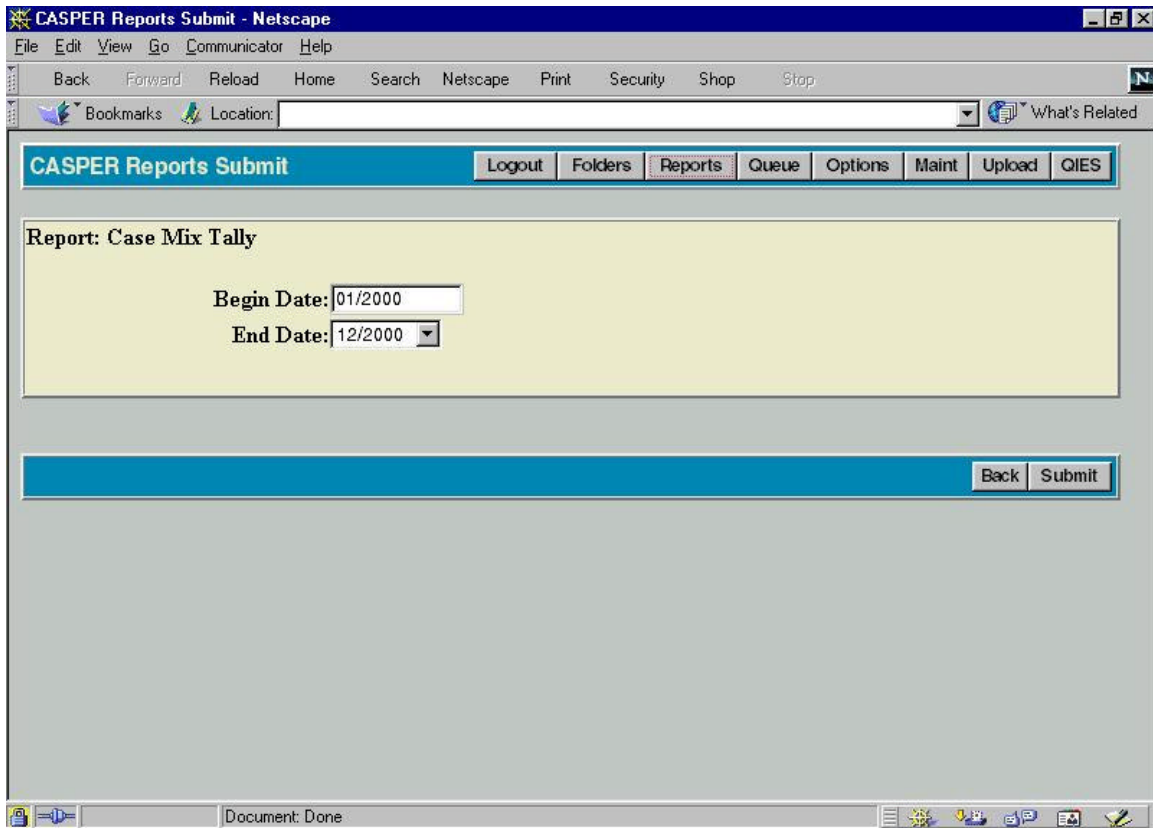


Figure 7. CASPER Reports Submit Page

4. Select the End Date for the desired reporting period, then select the Submit button.

NOTE: At this time, the OBQI Reports are only available in reporting periods of one year with data for the current and reference means. Upon selection of the desired End Date, the Begin Date field will automatically default to the month one year prior to the End Date. Currently, prior period data is not available on the OBQI Reports.

NOTE: The OBQM Reports continue to be available in reporting periods as short as one month. This is discussed later in the "Reporting Periods For OBQM Reports" section.

5. Following a report request, the user will receive verification that the request has been received by the system. Information on requested reports can also be viewed by selecting the Queue button in the CASPER menu bar. (Figure 8.)

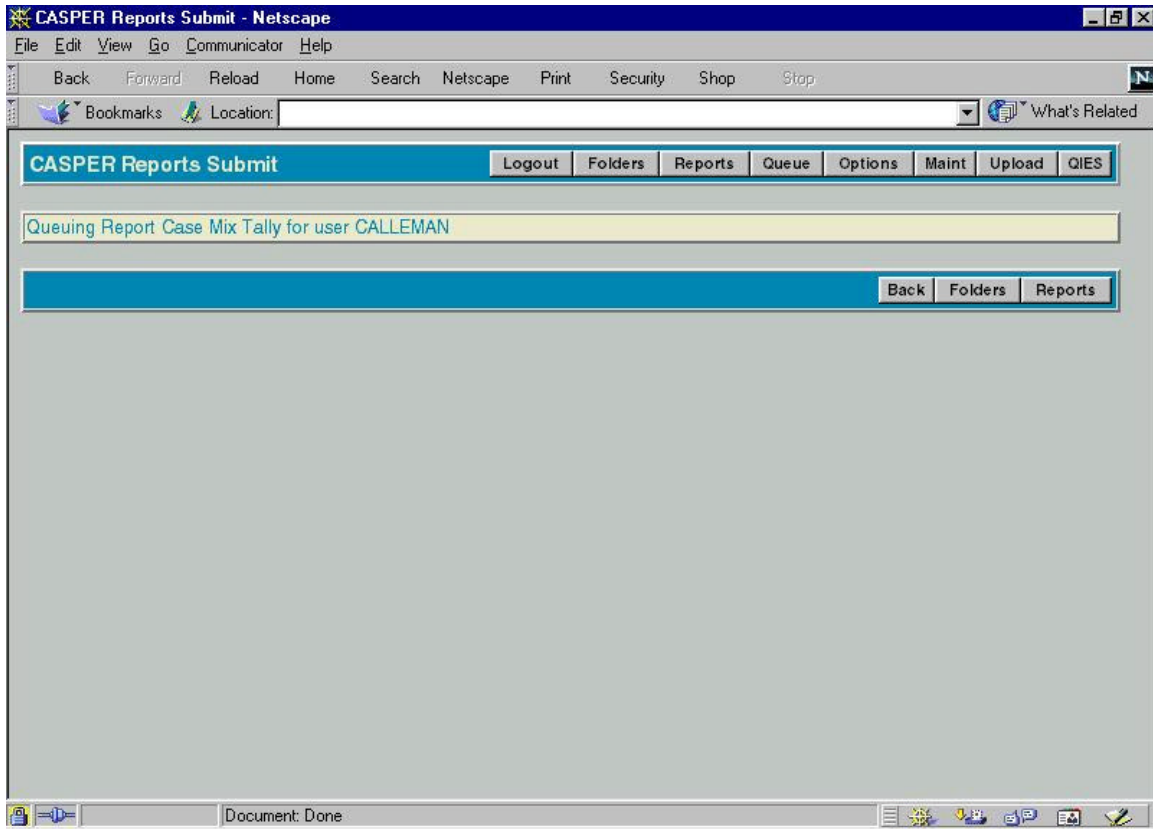


Figure 8. CASPER Reports Submit Verification Page

6. To request another report, select the Reports button to return to the listing of reports.
7. To view the completed report, select the Folders button.

NOTE: The length of time needed to generate a report following a request may vary. Therefore, it is suggested that the user log off after requesting the desired reports, and then return to the reporting system at a later time to retrieve the reports.

REPORTING PERIODS FOR OBQM REPORTS

1. The process to request the OBQM Reports is similar to that used when requesting the OBQI Reports. However, requests for the OBQM Reports may still be made for reporting periods as short as one month.

The default reporting date for the two-column format is a 12 month period ending 2 calendar months prior to the current month. The available fields are Begin Date and End Date. (Figure 9.)



The screenshot shows a light green background with two dropdown menus. The first dropdown is labeled "Begin Date:" and has the value "10/2000" selected. The second dropdown is labeled "End Date:" and has the value "09/2001" selected.

Figure 9.

The default reporting date for the three-column format includes both current and prior periods. The current date range for the three-column format is a 3 calendar month period ending 2 calendar months prior to the current month. The coinciding prior date range defaults to a 3 calendar month period prior to the current date range. The requestor may use the default date ranges or enter other desired date ranges. (Figure 10.)



The screenshot shows a light green background with four dropdown menus. The first dropdown is labeled "Prior Begin Date:" and has the value "04/2001" selected. The second dropdown is labeled "Prior End Date:" and has the value "06/2001" selected. The third dropdown is labeled "Begin Date:" and has the value "07/2001" selected. The fourth dropdown is labeled "End Date:" and has the value "09/2001" selected.

Figure 10.

VIEWING OBQI & OBQM REPORTS

1. In order to view reports, select the Folders button. The CASPER Folders page will display. When completed, previously requested reports are delivered to the default folder titled My Inbox. (Figure 11.)

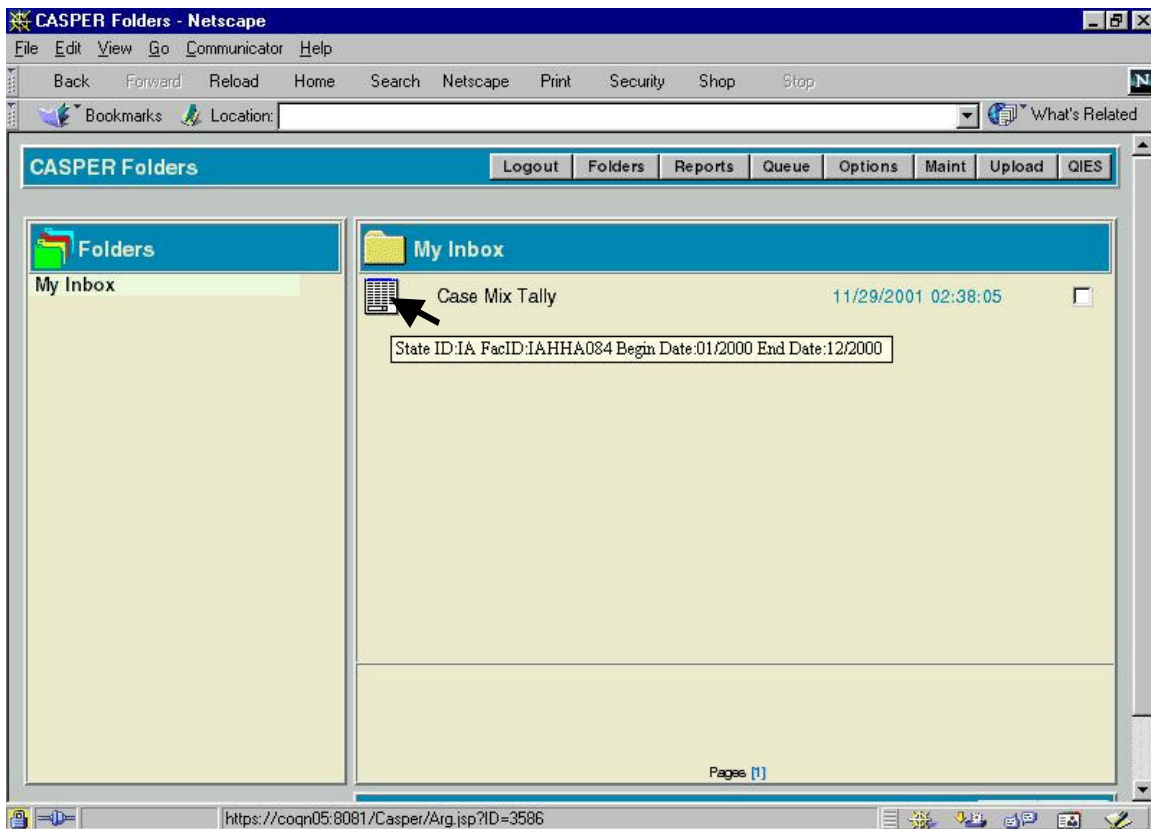


Figure 11. CASPER Folders Page

2. In order to view a report, click on the name of the desired report.
3. The date criteria for each report can be viewed by moving the mouse pointer over the report icon. A pop-up message will display with a brief description of the report criteria. (Figure 11.)

4. More detailed information regarding the report criteria can also be displayed by selecting the report icon. (Figure 12.)



Figure 12.

5. Use the report criteria information as a guide when selecting from a list of multiple reports. When selected, the following page will display. (Figure 13.)

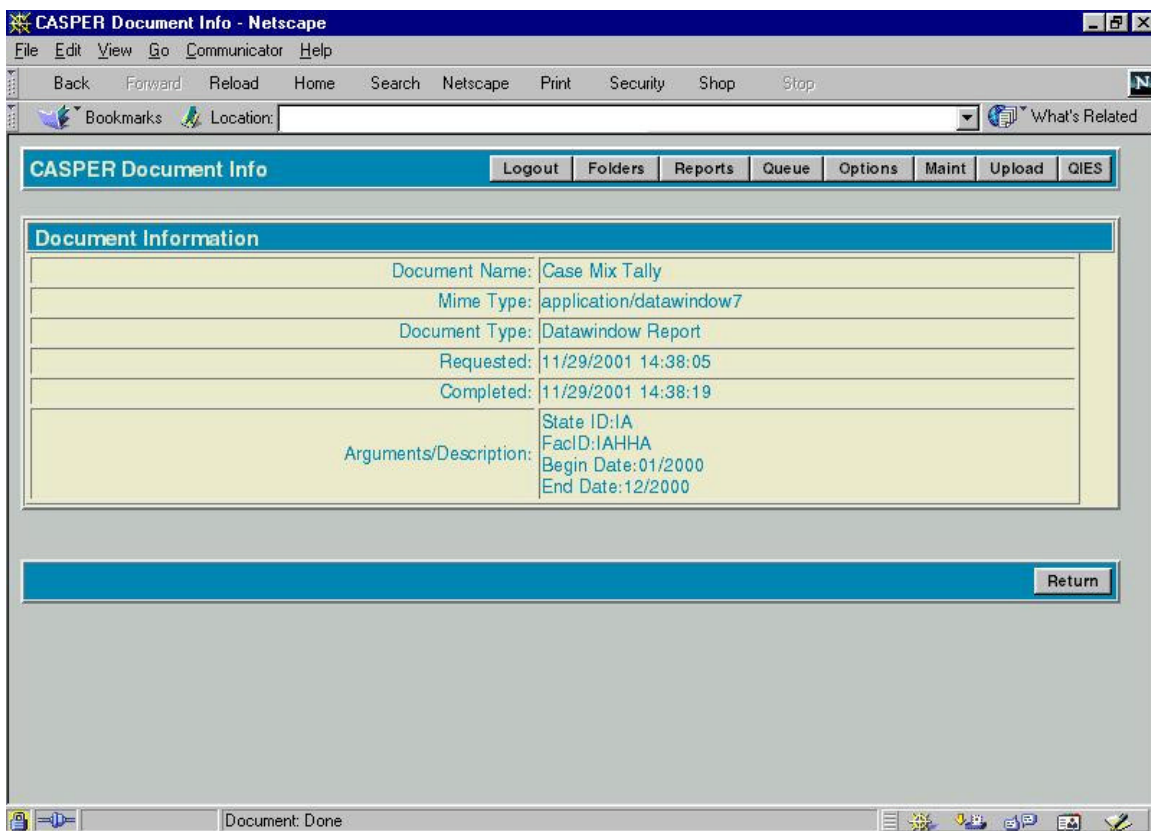


Figure 13. CASPER Document Info Page

PRINTING, SAVING, AND EXPORTING REPORTS

Internet Explorer Users:

1. Use the Reports tool bar located directly under the report window. (Figure 14.)

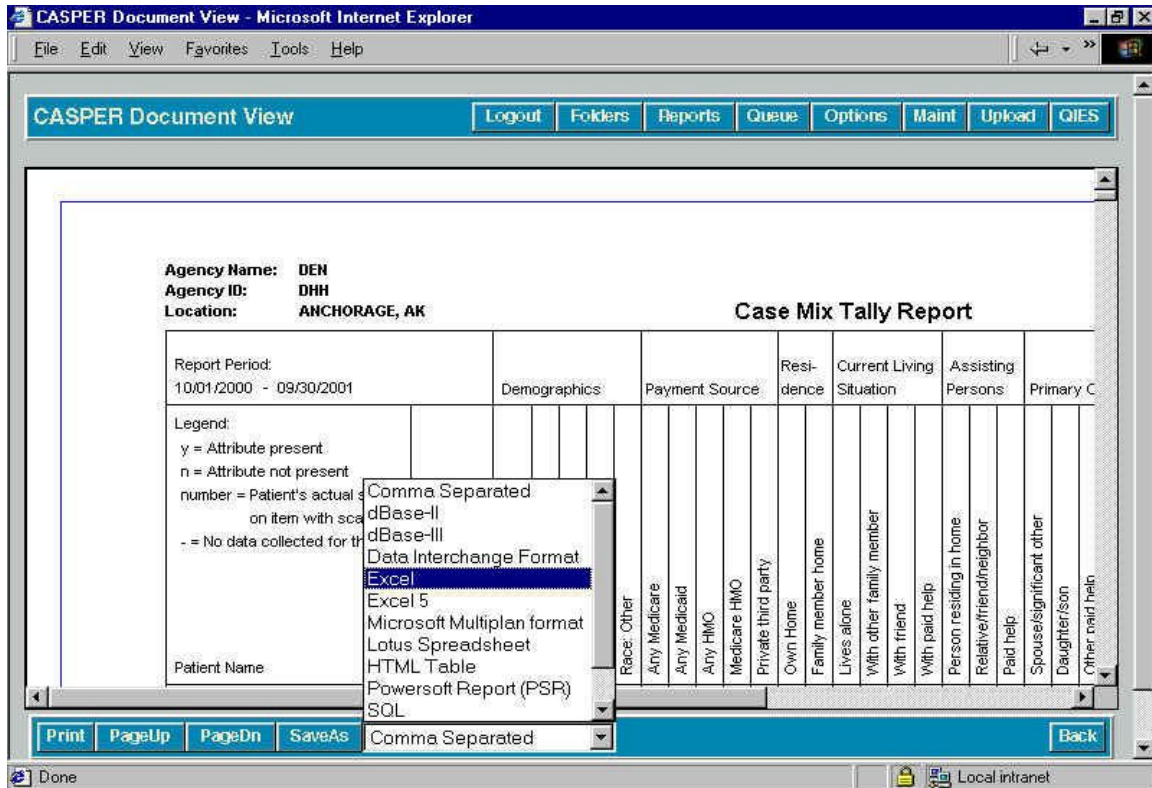


Figure 14. Reports Toolbar

2. To **print** the report, select the Print button from the reports toolbar. The report will automatically be printed to your default printer.
3. To **save** the report, select Powersoft Report (.psr) from the drop down box. Select the Save As button.
4. To **export** to a spreadsheet, select Excel (.xls) from the drop down box. Select the Save As button. The browser will display the report in a spreadsheet. To save this information, select the Save As option from the File drop down menu in your browser.

Netscape Users:

1. Users are given the option to Print or Save Rows. In either case, while viewing a report you must right click anywhere on the report to display these options. The built-in browser tools will not print or save the reports. (Figure 15.)

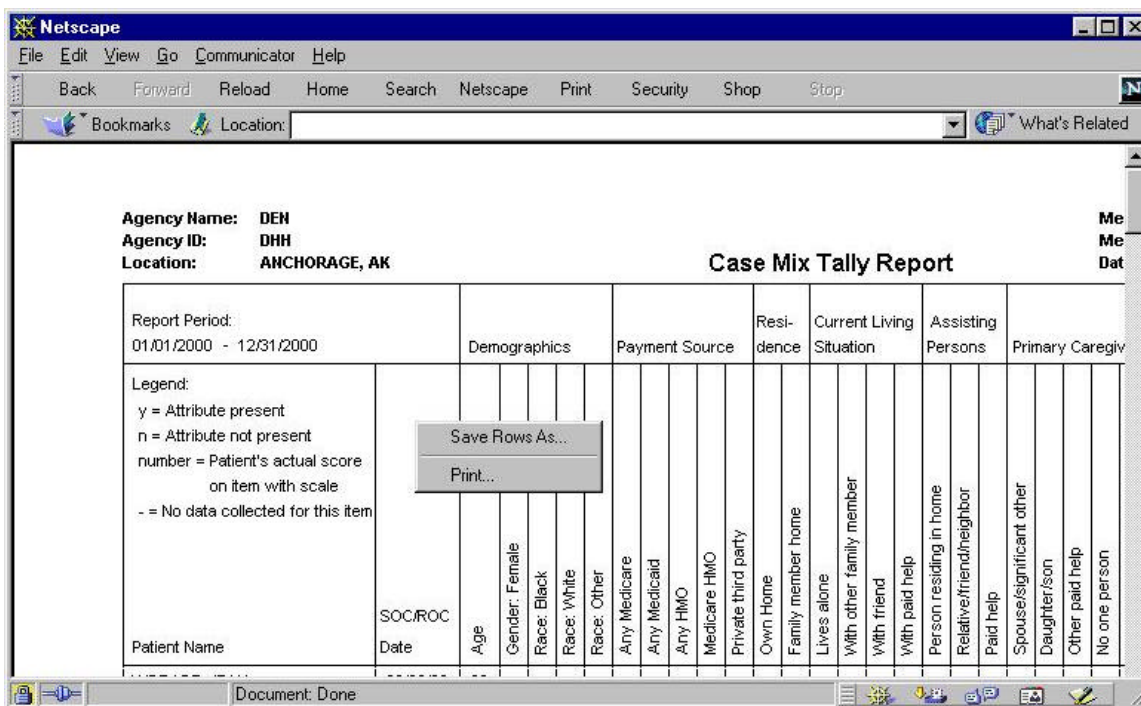


Figure 15. Netscape Users

2. To **print**, select the Print option. Your Printer dialog box will display allowing you to finish the print task.
3. To **save** the report, select the Save Rows As option. Save the report as a Powersoft Report (.psr). If this file type is not used, the report will not retain proper formatting.
4. To **export** the report to Excel, select the Save Rows As option. Save the report as an Excel or Excel With Headers file (.xls).

CUSTOMIZING THE CASPER REPORTING TOOL

1. The My Inbox folder is the default folder and cannot be changed. However, to add additional folders, select the Maint button from the CASPER menu bar. The CASPER Maintenance page will display.
2. Select the Insert button. Type the name for the new folder in the blank field under My Inbox. (Figure 16.)

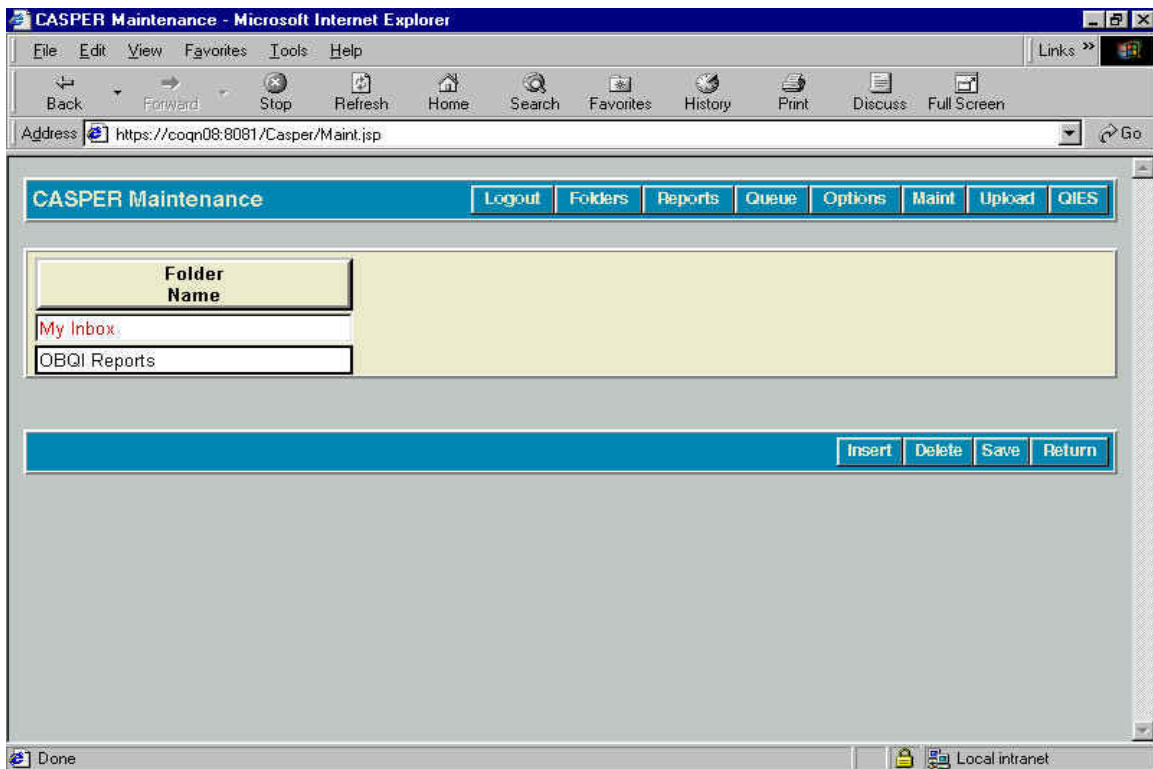


Figure 16. CASPER Maintenance Page

3. To save this new folder, select the Save button. To continue, select the Insert button again to create another folder, or the Return button to return to the CASPER Folders page.

4. To move reports from the My Inbox folder to your newly created folder, place a check in the box to the far right of the report listing and select the Move button. (Figure 17.)

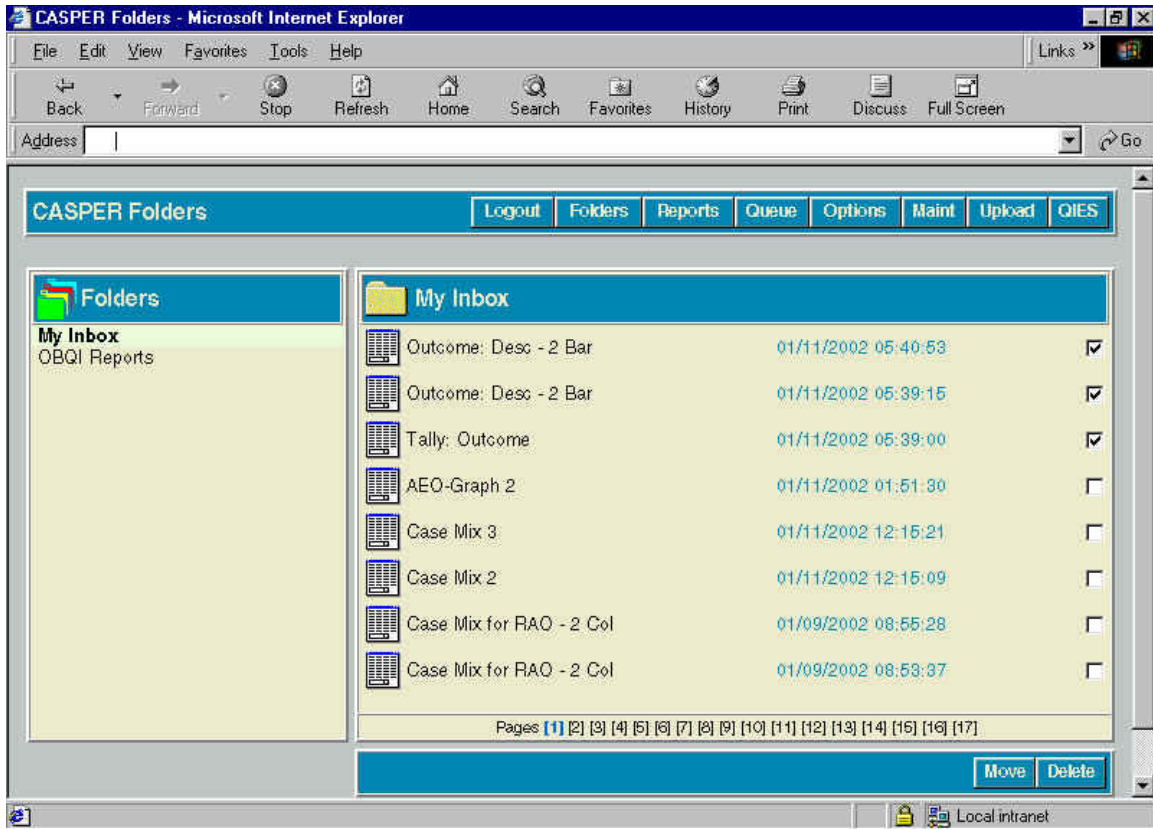


Figure 17. Moving Reports From My Inbox

5. The CASPER Move page will display with a list of the reports that were selected. (Figure 18.)
6. Open the drop down box and highlight the folder that the reports should be moved to. First select the Save button to retain the change, and then the Return button to return to the CASPER Folders page.

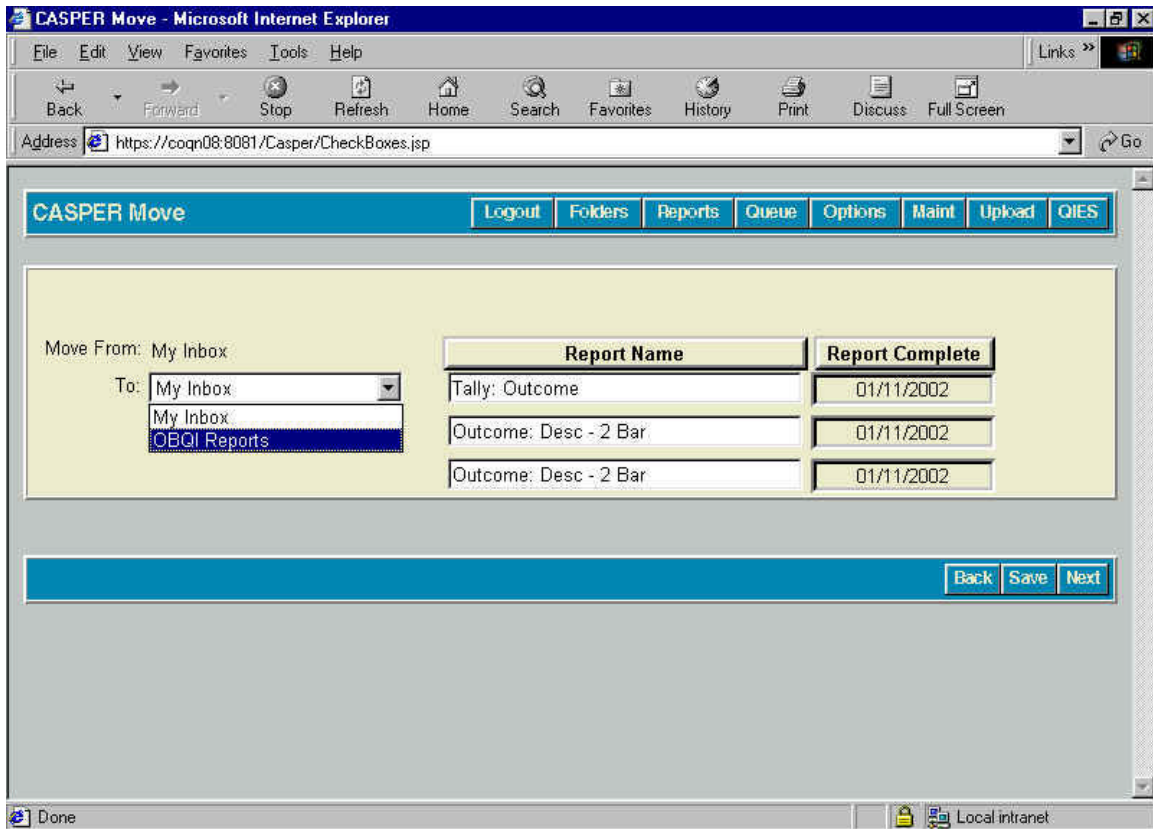


Figure 18. CASPER Move Page

7. When returning to the CASPER Folders page, you'll notice that the new folder now contains the reports that were just moved. (Figure 19.)

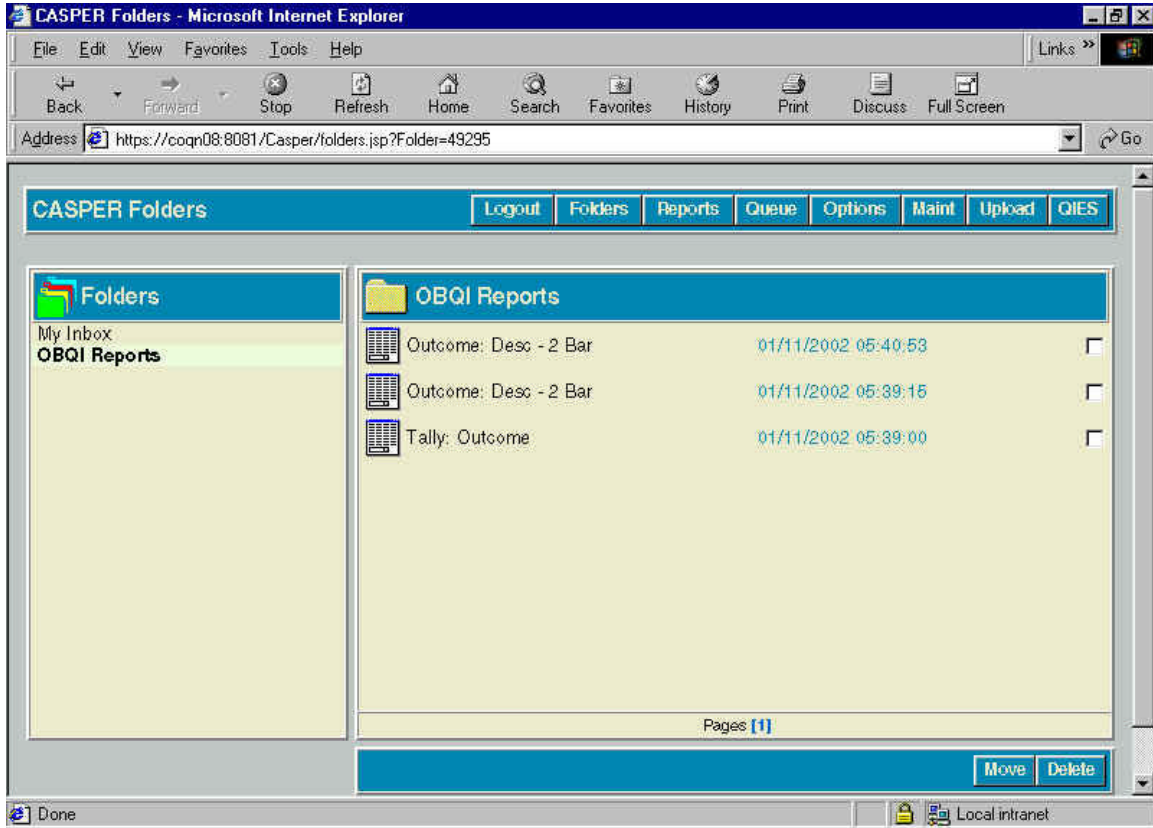


Figure 19. Newly Created Folder

8. To delete reports, place a check in the box to the far right of the report listing and select the Delete button.
9. A message will display requesting that the user confirm the delete request. (Figure 20.)

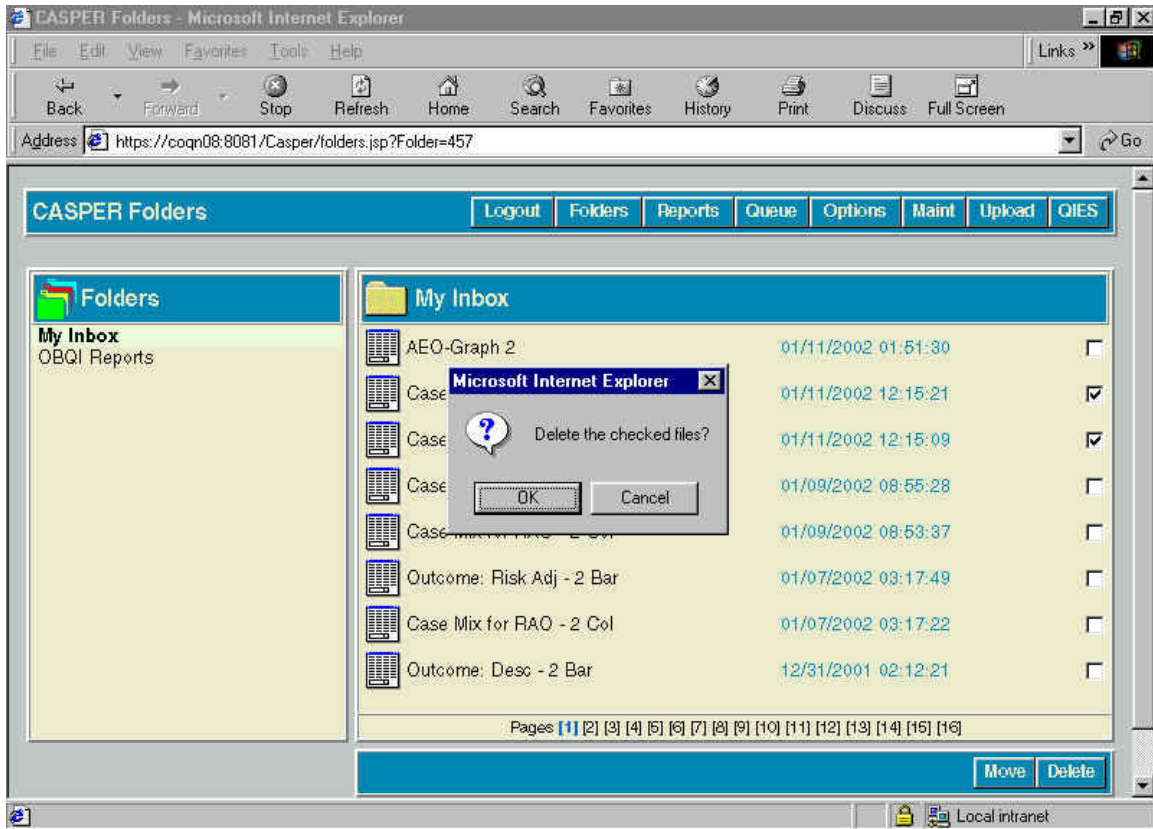


Figure 20. Delete Confirmation

10. To continue with the deletion request, select the OK button. The CASPER Delete page will display. (Figure 21.)

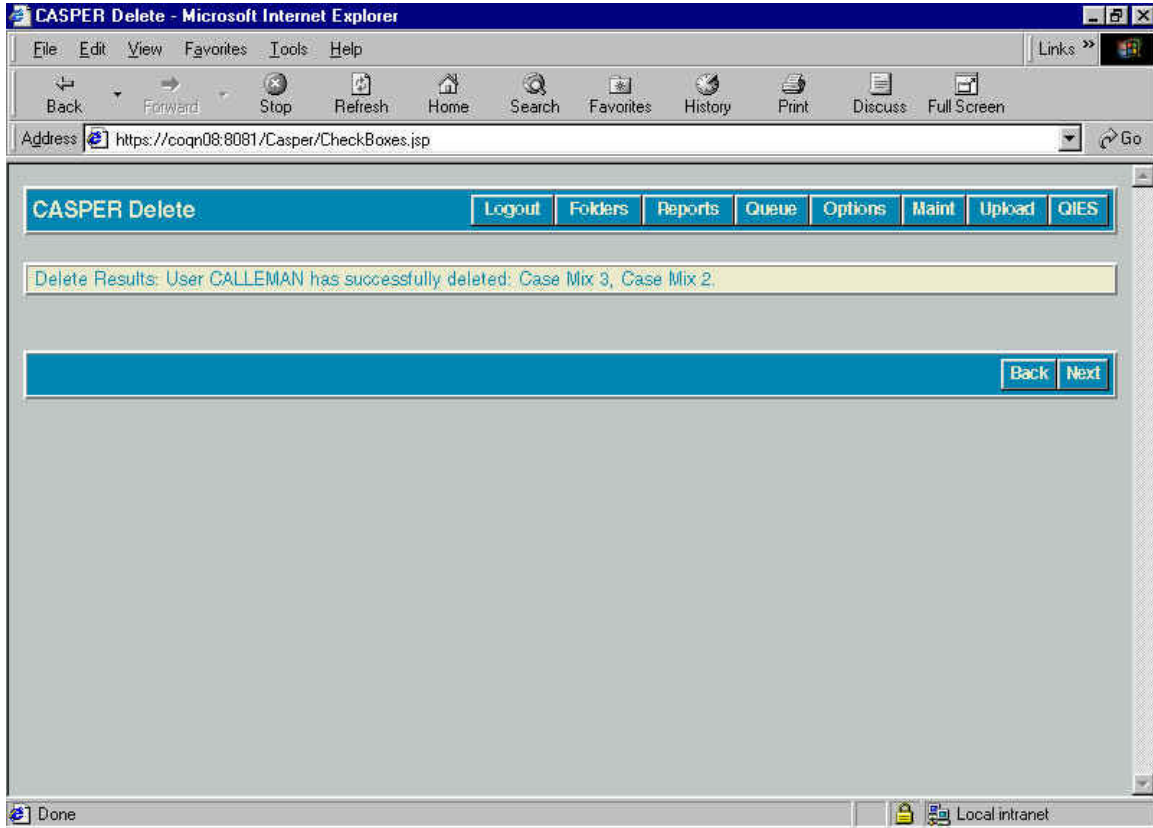


Figure 21. CASPER Delete Page

11. To return to the CASPER Folders page, select the Next button.

12. To alter the number of reports that are displayed on any given page, select the Options button from the CASPER menu bar.
13. The CASPER Options page will display allowing the user to enter the desired number of rows in the Setting Value field. After the entry has been made, select the Save button to retain the setting, and then the Return button to return to the CASPER Folders page. (Figure 22.)

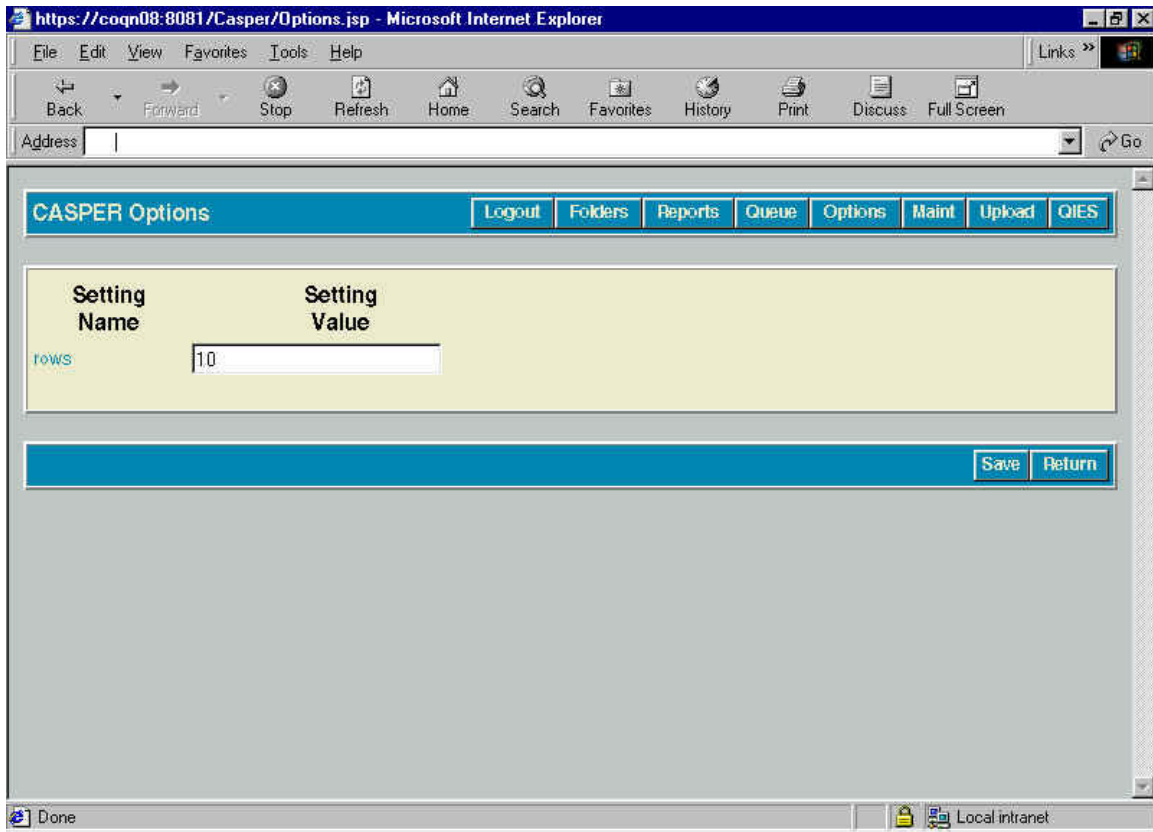


Figure 22. CASPER Options Page