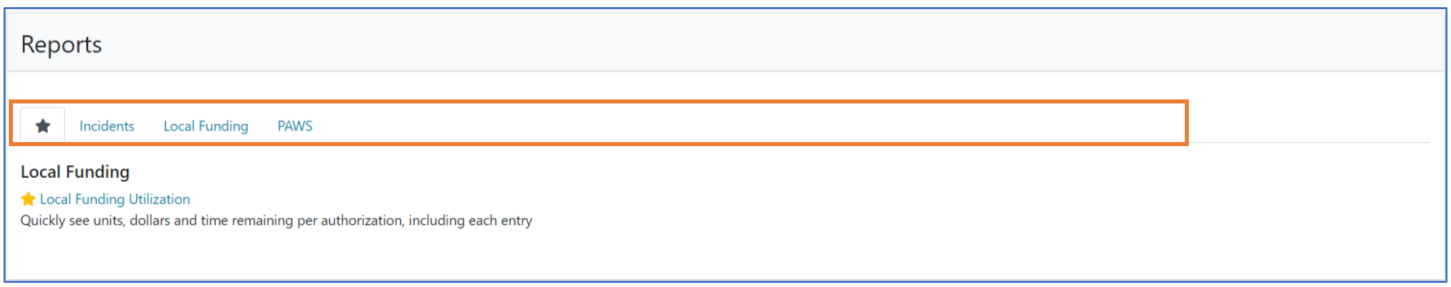
Overview

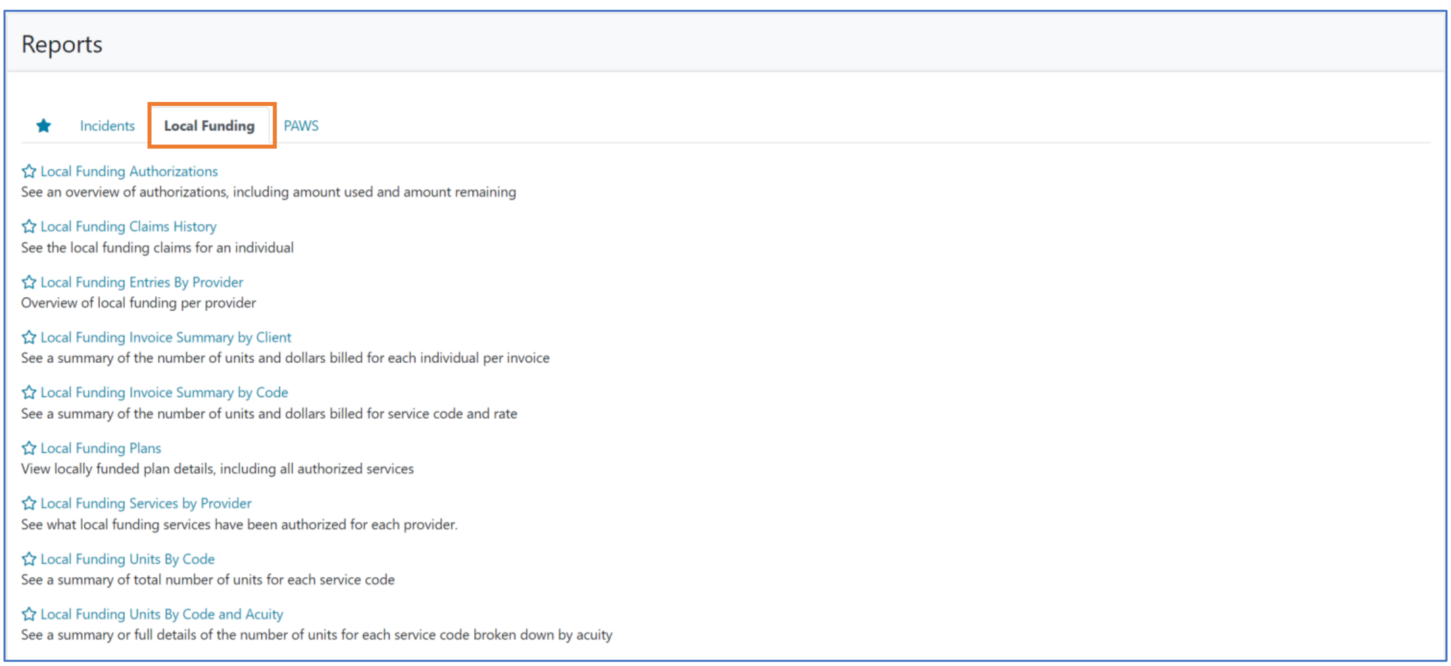
While there are many ways to look up information in Brittco, you'll likely want to use reports to give you summaries and snapshots of the most relevant data. There are many, many reports in Brittco and what this document outlines are the reports we think you'll be most likely to use. Feel free to explore other reporting options as you use Brittco and figure out what is the most beneficial for you.

To begin this document, we want to show you how to create a list of favorite reports and look at report filters to give you guidance on how you can restrict the data the returned in a report. Additionally, we'll identify the different options for downloading reports as well as saving commonly used filters to make report retrieval easier.

When you click on the *Reports* module from the left navigation panel, you'll see tabs that outline the various categories of reports in alphabetical order. The tabs are listed in what's referred to as stacked tabs meaning there are two rows of tabs in the current screenshot. Depending on your screen resolution, the layout of the tabs may vary but if new report categories are added, they'll be alphabetically inserted into the list. Not all reports will pertain to you and what you do at Summit County so it's likely you'll not be interested in all the report categories.



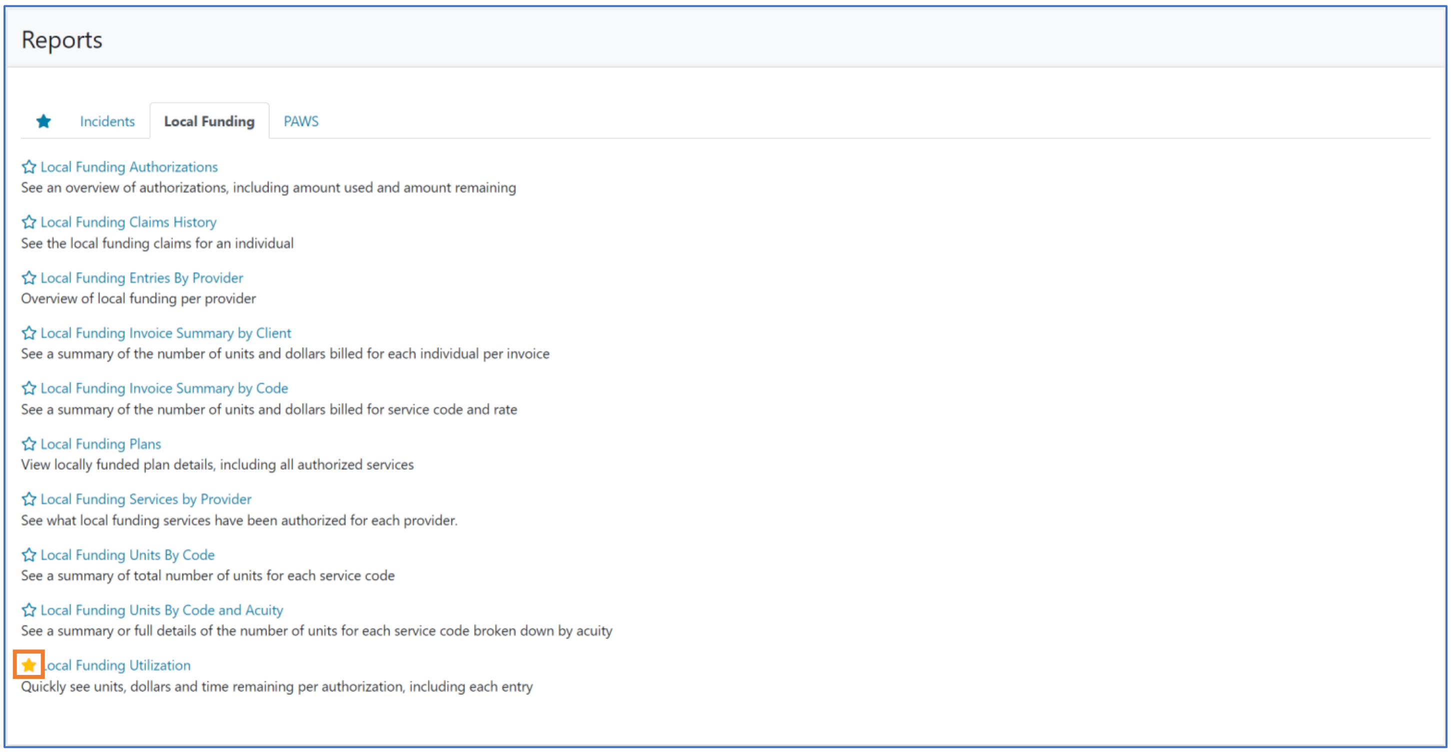
To see the list of available reports for any of the categories, just click on the appropriate tab.



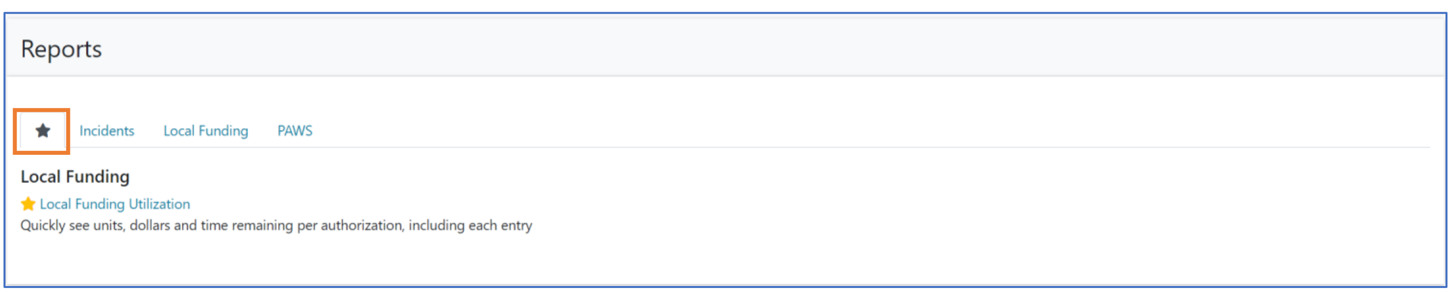
Creating a Favorite Report List

All information systems provide a plethora of reports to cover almost every conceivable way a user might want to view the data. Some of these reports are gems, some not so much. As you discover the reports that are the most useful to you, you can add them to a Favorites list that will then appear at the very beginning of your report tabs. Let's step through this process.

Select a report that you often use by navigating to the report tab and scrolling (if necessary) to locate the report. Click on the **Star** icon (*Favorites*) at the beginning of the report name. The **Star** icon is a toggle – click it once to turn it on, click it again to turn it off.



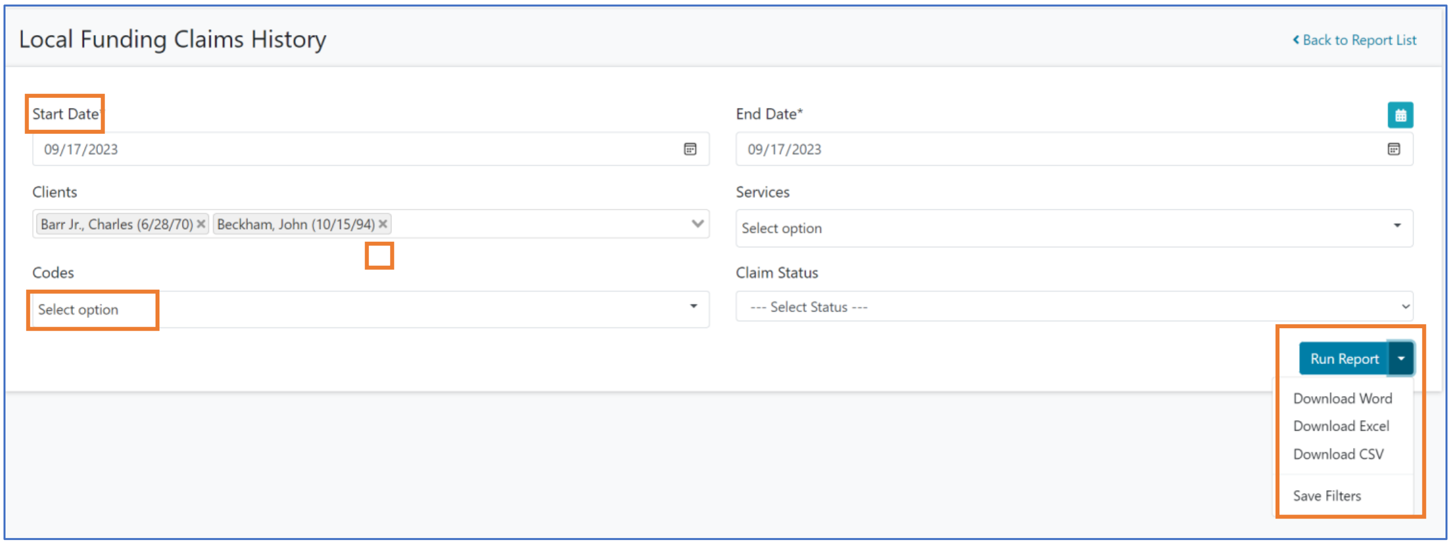
The next time you open the *Reports* module, the first category of the report tabs is **Favorites** (★)reports. You can add as many reports as you want to this list. To remove a report from this list, just click the gold **Star** icon to turn it off.



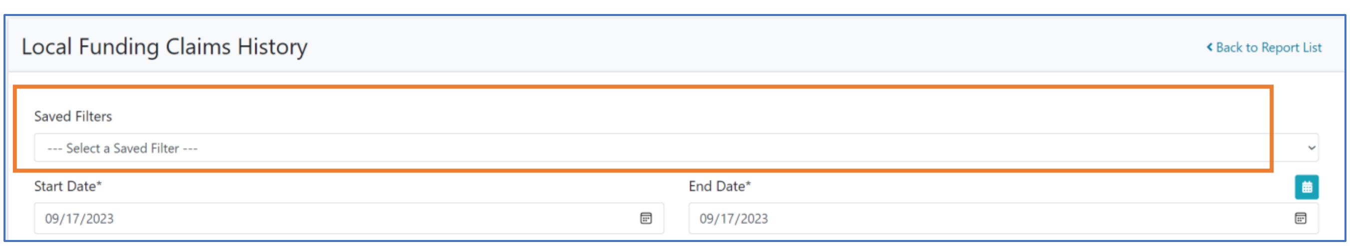
Common Report Filter Options

As with other filter screens in Brittco, the options you have will vary depending on the type of information – or in this case the type of report – you're filtering. We're going to review filter options on 3 reports, to identify some nuances to how filters can be applied. We're identifying these reports by the *Tab Name>Report Name*.

A couple of quick notes:

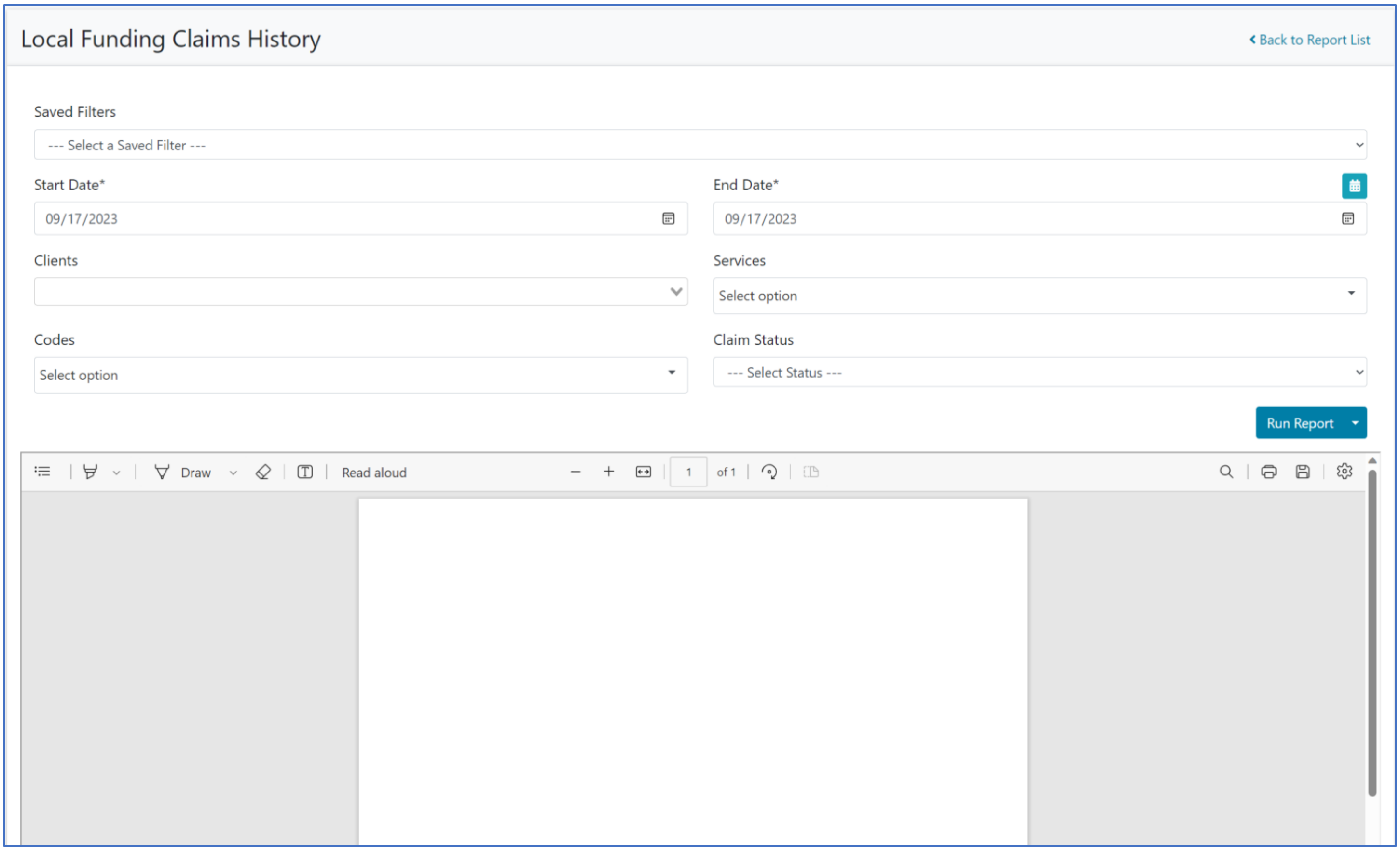


- Any filter with an asterisk by its name is a required filter. There's likely a default value already entered that you could overwrite with the value you want.
- You can remove a selected item from the filter by clicking on the **X** to the right of the item name.
- Any filter left blank or with the words *Select Option* will return all values for that category in conjunction with the other filters.
- If you click on the **Run Report** button, your report results appear in the window below the filters.
- If you click on the **Run Report** drop-down arrow, you can save the output of the report results to a *Word*, *Excel* or *CSV* file.
- If you click on the **Run Report** drop-down arrow and choose *Save Filters*, you can save your most commonly used filters for this report, which then appears as an additional filter at the top of the report.



Hate When this Happens

Every now and then when you run a report, you may end up with a blank report in the results window.



When this occurs, here are some common culprits:

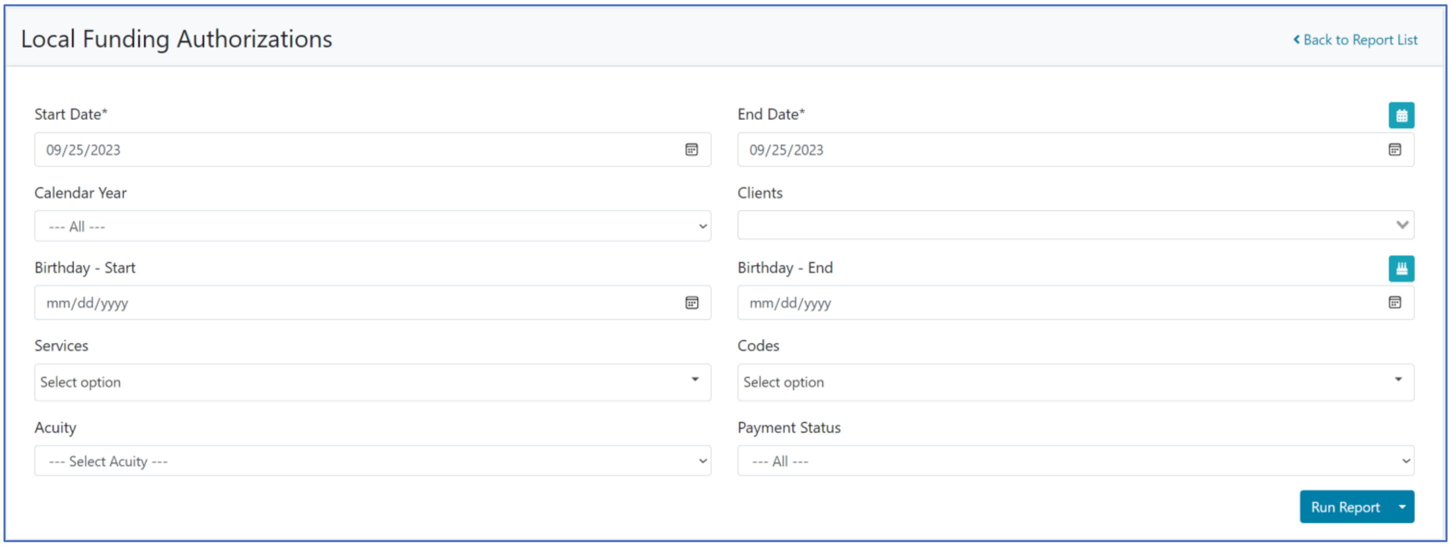
- **Check the Date or Date Range (Start Date to End Date)** – Default dates are often set to today's date. If the Start Date and the End Date are set to today and nothing happened on that day, you'll get a blank report.
- **Filters Cancelled Each Other Out** – If you choose a **Client** to search for and then designate a **Service** for a specific staff member, the report will only appear if the client chosen is receiving that service. Setting multiple filters creates an **AND** statement – the report result must meet **ALL** of the criteria in the filters. Sometimes using too many filters eliminates too many records.

Filter Examples from Specific Reports

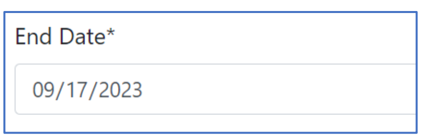
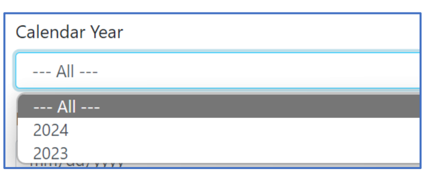
Let's look at some common filtering options by reviewing specific reports that you can use as a guide.

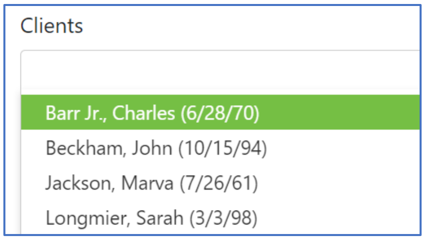
Local Authorizations>Local Funding Authorizations

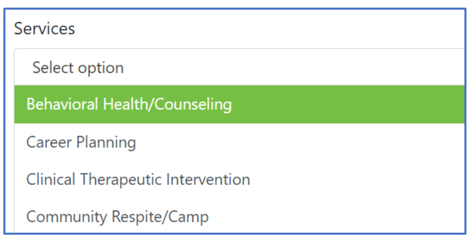
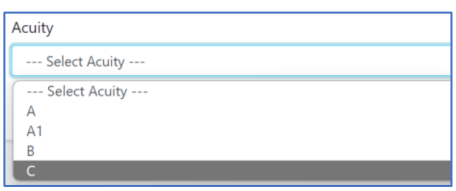
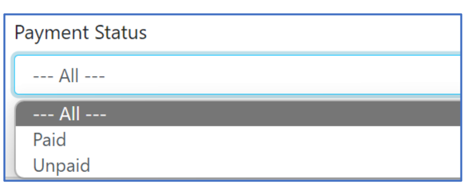
The report filters for this report include many common ones. Remember – any undesignated filter (*Select option*) will return all values for that category in conjunction with the other filters.



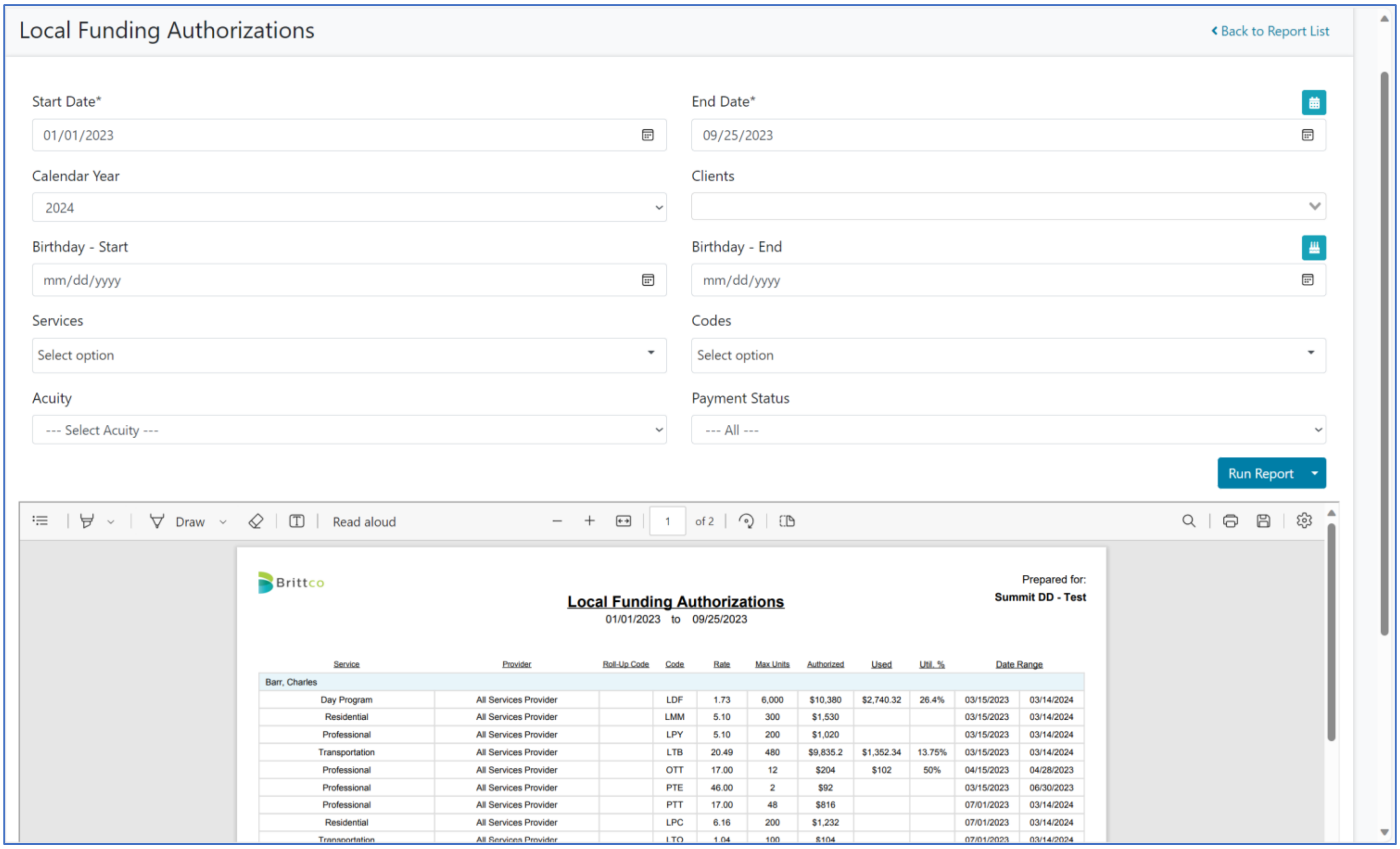
Points of Interest

Filter	Picture	Notes
Start Date **End Date**	 	• **Start Date** and **End Date** are required fields – the asterisk indicates that. • If there is only one date parameter (no **Start Date** or **End Date**), it is typically an *As Of* date, meaning that the data returned in the report is accurate *as of* the date listed.
Calendar Year		• If you don't want to focus on specific dates, you can designate a calendar year to only pull services that began within a particular calendar year. • If you enter specific dates and a calendar year, you may get more data or possibly less data than you intended.

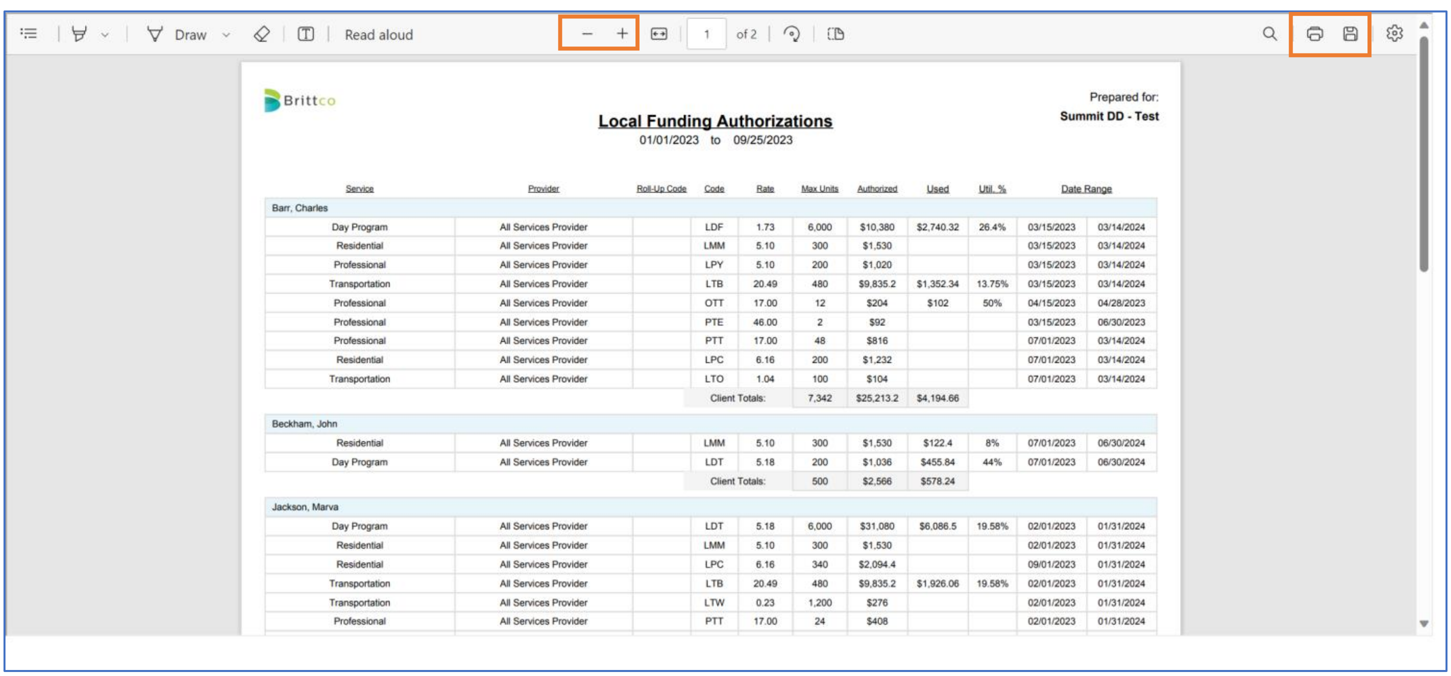
Clients		• **Client** drop-down lists are alphabetized by name. • You can select a single client or multiple clients by scrolling to the client name and pressing **Enter** on each selection you want to include.

Filter	Picture	Notes
Birthday Start **Birthday End**	 	• If you want to pull up authorizations based on an individual's birthday, you may designate that. • Remember the more dates you put in, the more limits you put on the resulting data.
Services		• **Services** drop-down lists are alphabetized by name. • You can select a single service or multiple services by scrolling to the service name and pressing **Enter** on each selection you want to include.
Codes		• Alphabetically lists the various service codes. • You can select a service code or choose multiples by scrolling to the entry and pressing **Enter**.
Acuity		• If you want to pull up a list by **Acuity** you can do so. • Remember on dropdown lists, you can select more than one item.
Status		• You can call up a list based on whether the line items are **Paid** or **Unpaid**. • By default, the filter is set to **All** to pull both statuses from the data.

When you run the report, you'll see the results in the *Report Window*.

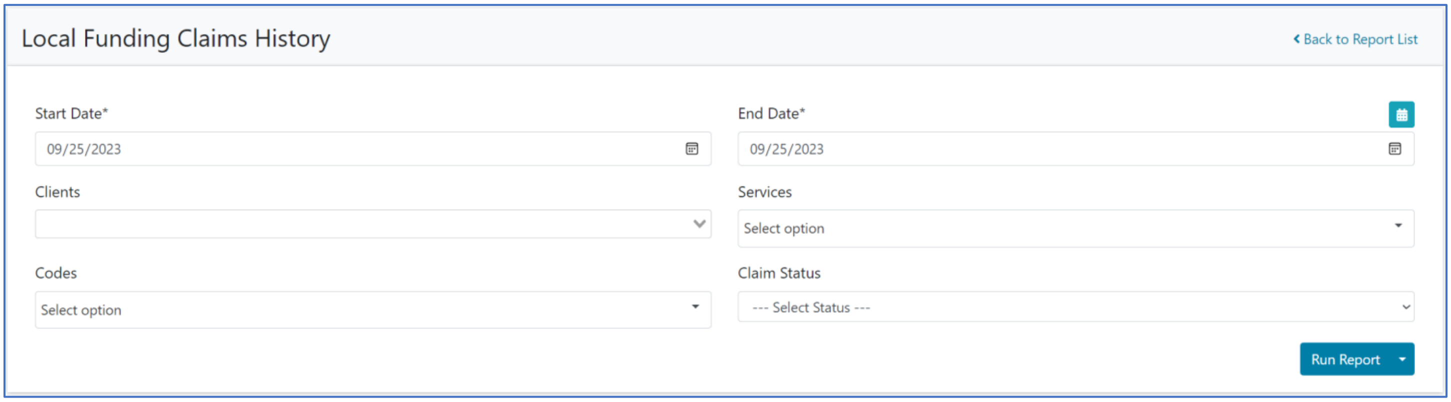


Within the report window itself, you can use the **–** or **+** buttons to zoom in or use the command buttons to **Print** or **Save**.

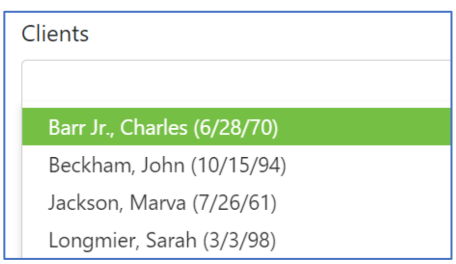
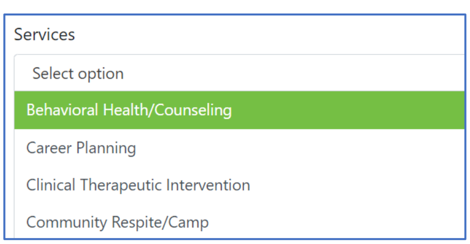


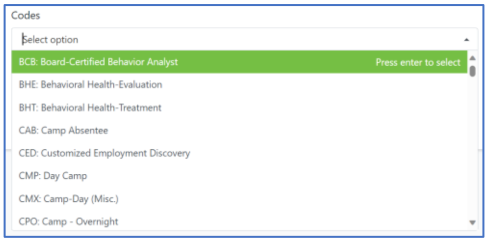
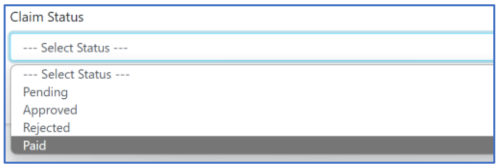
Local Funding>Local Funding Claims History

This report is a cumulative list of all the local funding claims for a specific period. If you don't designate additional criteria, it will list all individuals and services for that time period as well as all claim statuses.

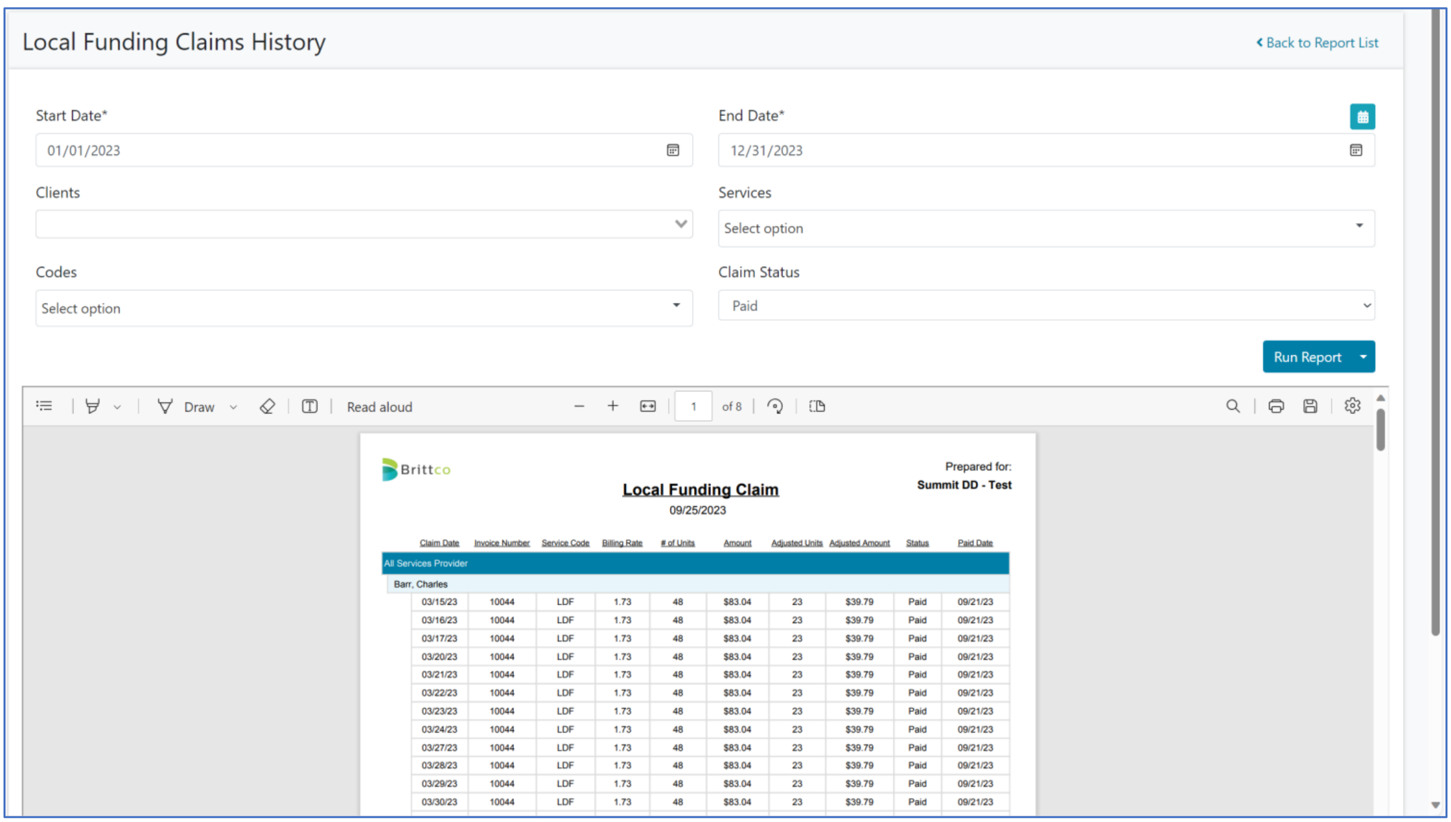


Points of Interest

Filter	Picture	Notes
Start Date		• Defaults to today's date – you'll likely want to set that to an early start date.
End Date		• Defaults to today's date – which may be fine but you can also change it to an end date for a specific period. • Remember you can click on the aqua **Calendar** button to get a relative date scale (*Current Month*, *Current Quarter*, *Last Quarter*, *Last Year*, etc.).
Clients		• **Client** drop-down lists are alphabetized by name. • You can select a single client or multiple clients by scrolling to the client name and pressing **Enter** on each selection you want to include.
Services		• **Services** drop-down lists are alphabetized by name. • You can select a single service or multiple services by scrolling to the service name and pressing **Enter** on each selection you want to include.

Filter	Picture	Notes
Codes		• Alphabetically lists the various service codes. • You can select a service code or choose multiples by scrolling to the entry and pressing **Enter**.
Claim Status		• Allows you to choose the line item status. • Typically, Summit County only marks claim line items as **Rejected** or **Paid**. Default statuses for unsent claims is **Pending**.

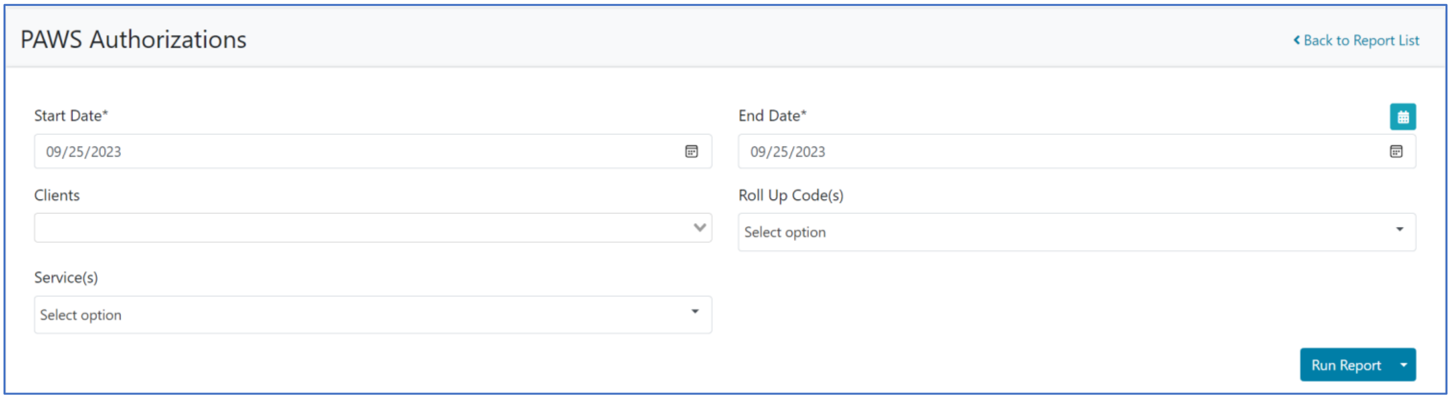
When you run the report, you'll see the results in the *Report Window*.



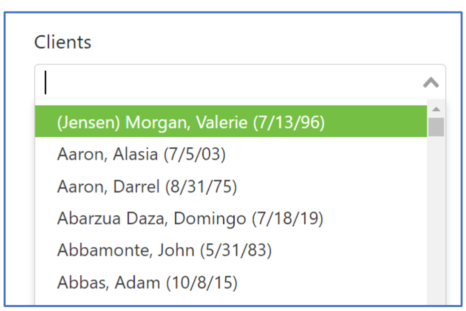
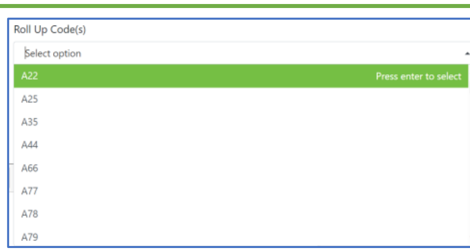
Claim Date	Invoice Number	Service Code	Billing Rate	# of Units	Amount	Adjusted Units	Adjusted Amount	Status	Paid Date
03/15/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/16/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/17/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/20/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/21/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/22/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/23/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/24/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/27/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/28/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/29/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23
03/30/23	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	09/21/23

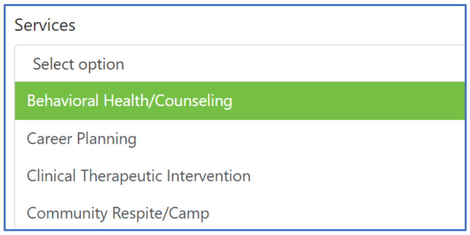
PAWS>PAWS Authorizations

This report lists the authorizations on the PAWS for the individual. This data comes from DODD and is updated on a nightly basis into Brittco.

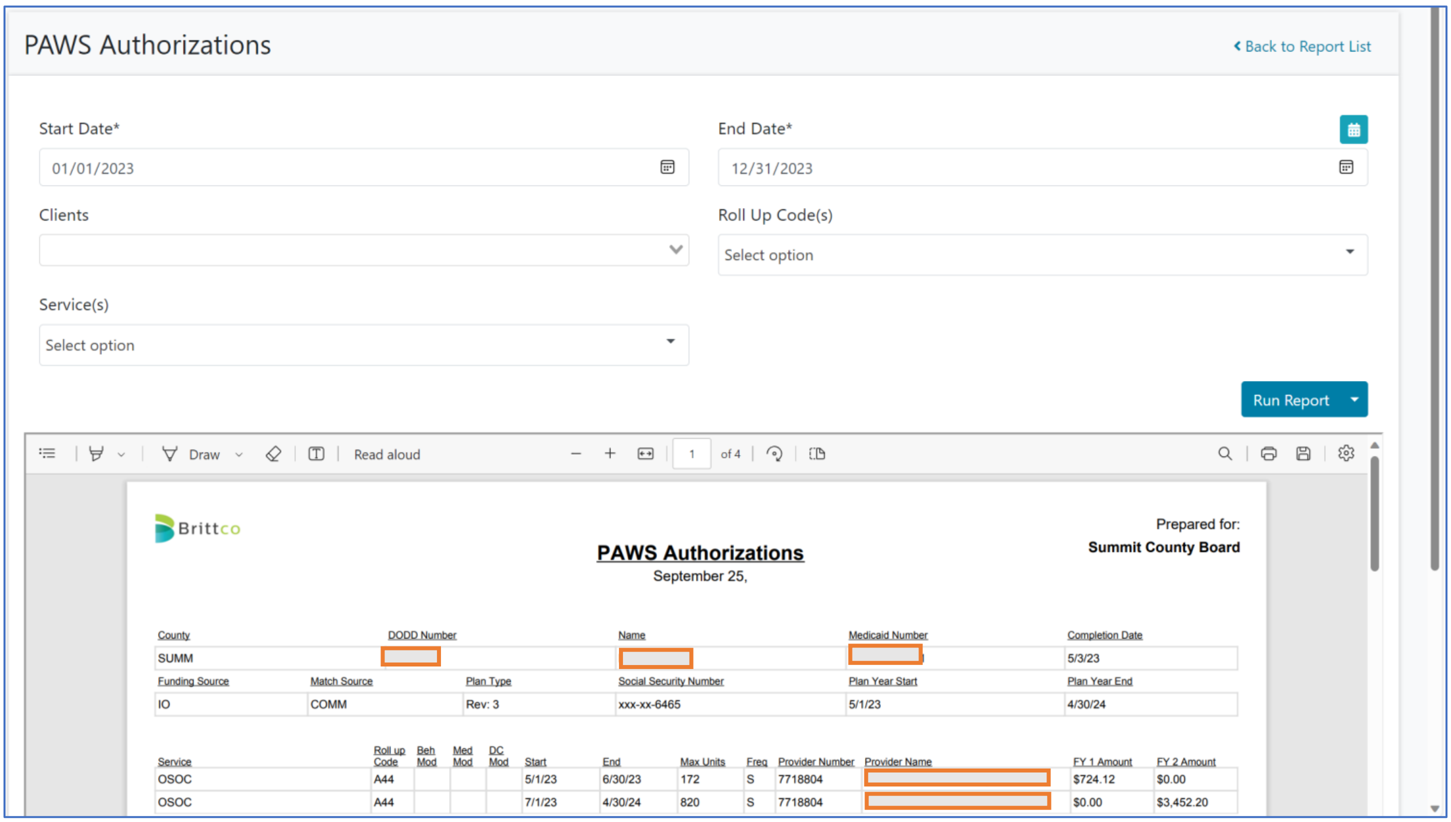


Points of Interest

Filter	Picture	Notes
Start Date		• Defaults to today's date – you'll likely want to set that to an early start date.
End Date		• Defaults to today's date – which may be fine but you can also change it to an end date for a specific period. • Remember you can click on the aqua **Calendar** button to get a relative date scale (*Current Month*, *Current Quarter*, *Last Quarter*, *Last Year*, etc.).
Clients		• **Clients** drop-down lists are first alphabetized by client names and also include the date of birth to help distinguish individuals with similar names. • You can select a single client or multiple clients by scrolling to the name and pressing **Enter** on each selection you want to include.
Roll Up Codes		• **Roll Up Coes** allows you to choose what category of services you would like to report on. • You can select multiple roll up codes by scrolling down and pressing the Enter key on your keyboard or by selecting the code with your mouse.

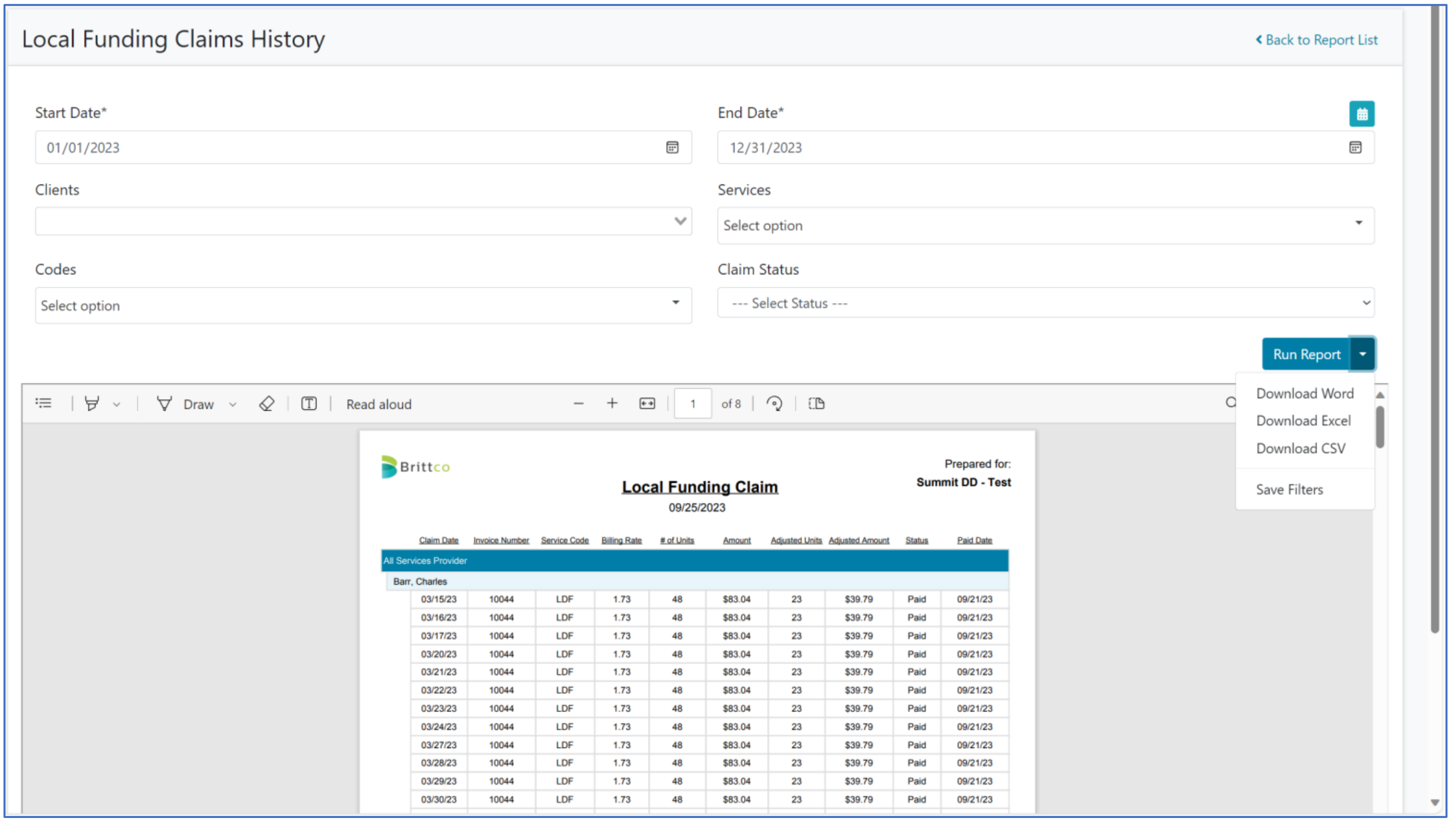
Filter	Picture	Notes
Services		• **Services** drop-down lists are alphabetized by name. • You can select a single service or multiple services by scrolling to the service name and pressing **Enter** on each selection you want to include.

When you run the report, you'll see the results in the *Report Window*.

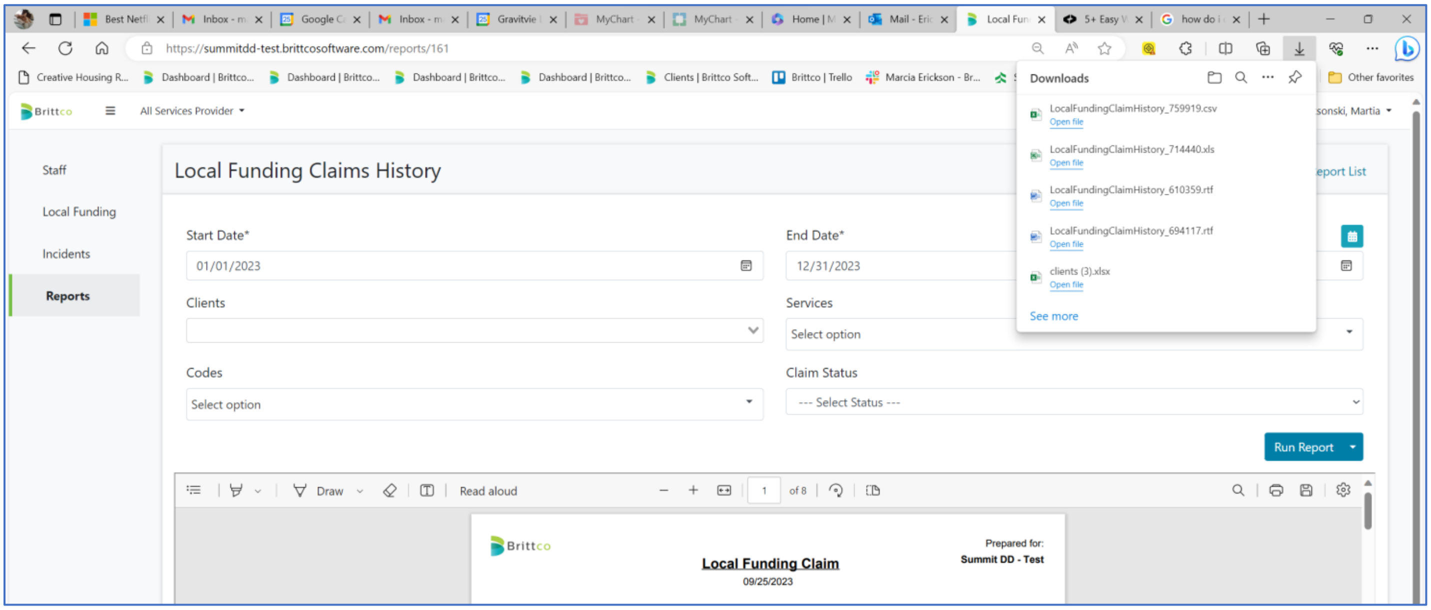


Exporting Data

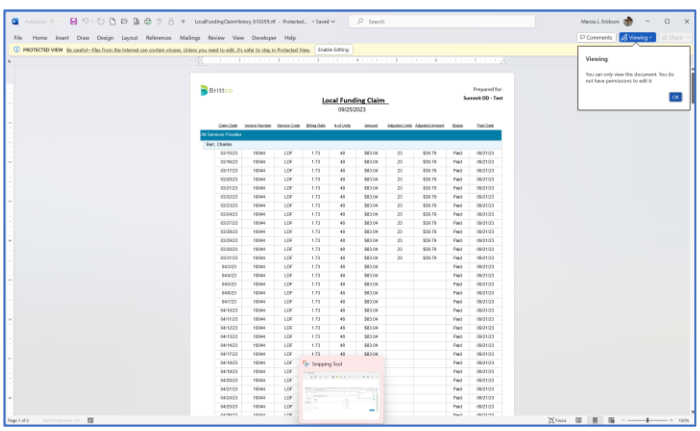
On any reports you run, you always have an option to export the data to another format. Typically your options include Word, Excel or CSV.

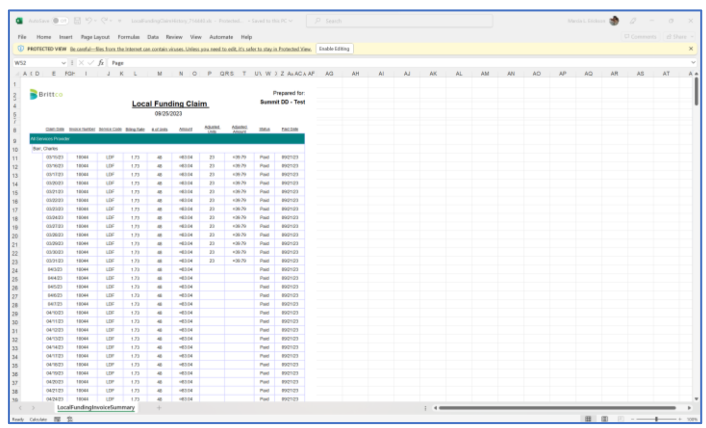


When you download a file, a copy is placed in your Downloads folder you'll get a link either in the upper right corner of your screen or in the lower left corner of the screen, depending on what web browser you're using.

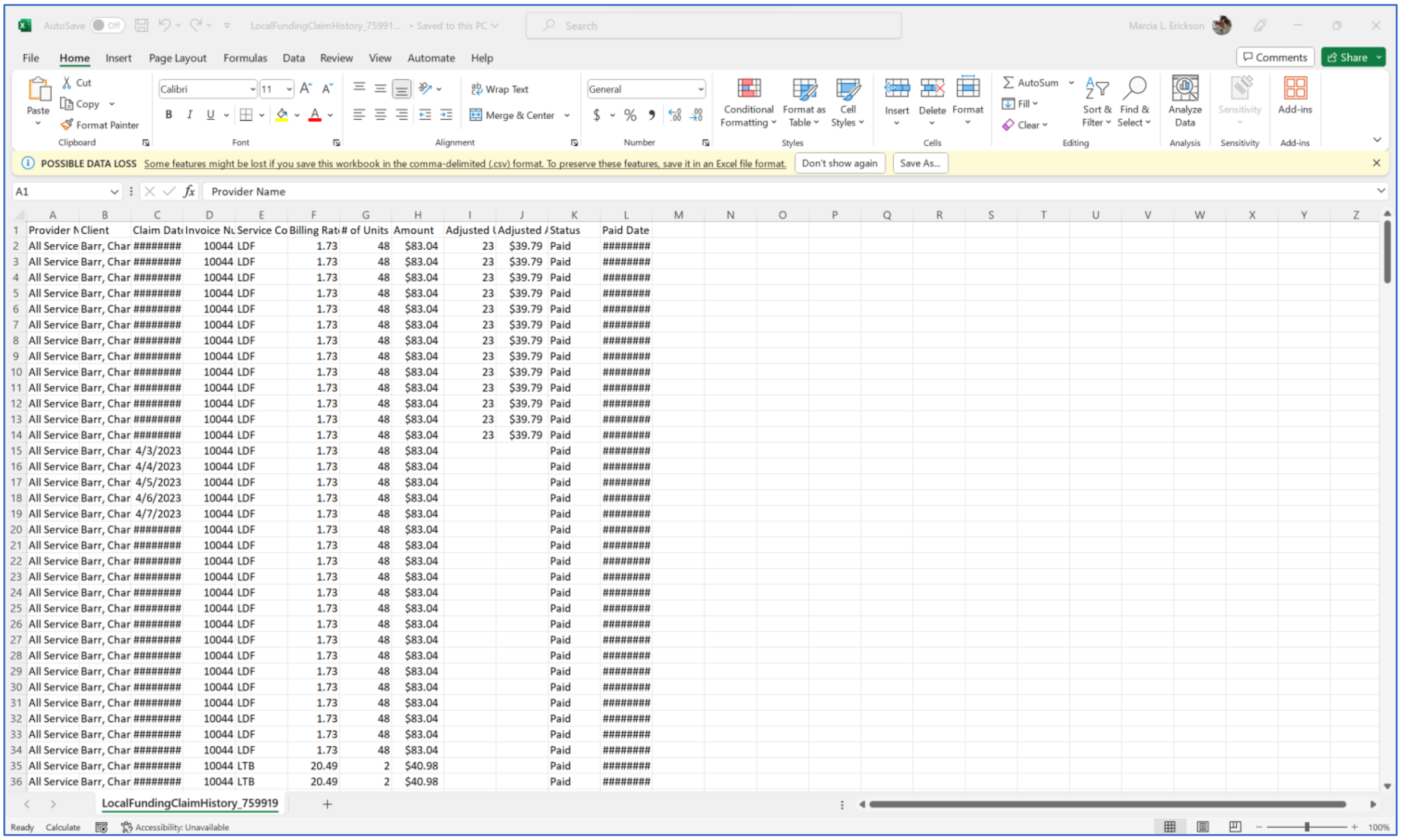


While Word and Excel are likely more familiar to you, if you download them the report looks pretty much the same as it did in the report window. You won't be able to manipulate this information in any particularly useful way.





Even though it might be less familiar to you, downloading a report as a CSV file is often your best bet. CSV stands for *Comma Separated Values* and it means that when the file opens in Excel (which is the default), it will separate the data into columns based on a separating character (which may be a comma or semi-colon, etc.). The challenge is that often these files come in kind of ugly.



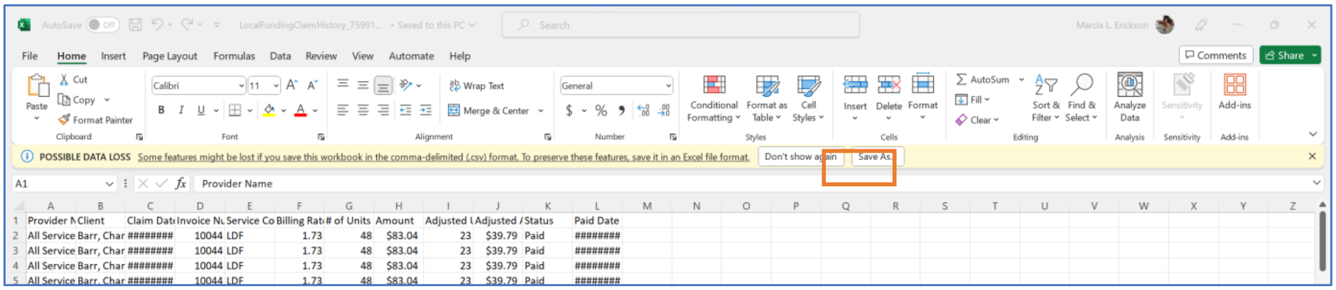
A1 Provider Name

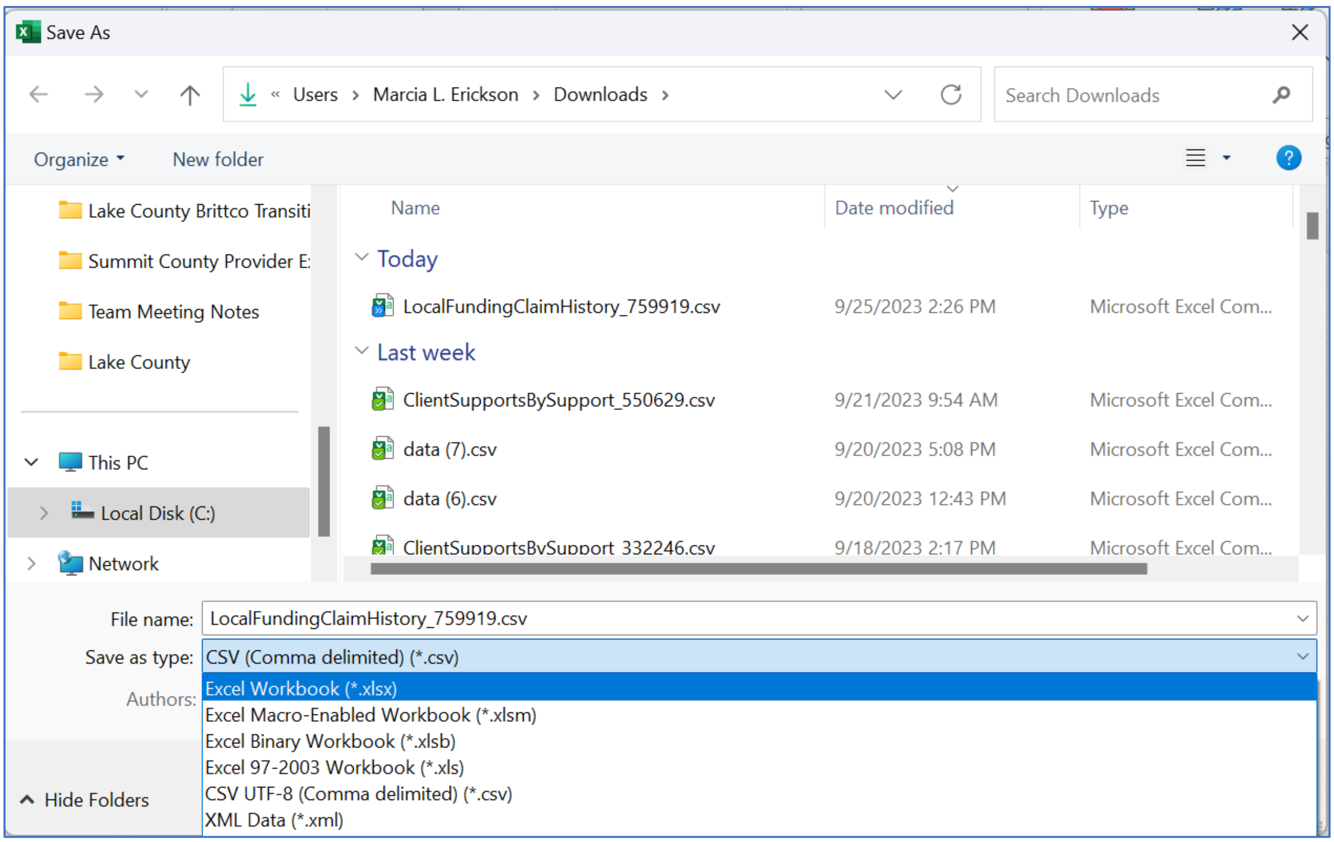
	A	B	C	D	E	F	G	H	I	J	K	L
1	Provider N	Client	Claim Dat	Invoice Nu	Service Co	Billing Rat	# of Units	Amount	Adjusted U	Adjusted A	Status	Paid Date
2	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
3	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
4	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
5	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
6	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
7	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
8	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
9	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
10	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
11	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
12	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
13	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
14	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04	23	$39.79	Paid	########
15	All Service	Barr, Char	4/3/2023	10044	LDF	1.73	48	$83.04			Paid	########
16	All Service	Barr, Char	4/4/2023	10044	LDF	1.73	48	$83.04			Paid	########
17	All Service	Barr, Char	4/5/2023	10044	LDF	1.73	48	$83.04			Paid	########
18	All Service	Barr, Char	4/6/2023	10044	LDF	1.73	48	$83.04			Paid	########
19	All Service	Barr, Char	4/7/2023	10044	LDF	1.73	48	$83.04			Paid	########
20	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
21	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
22	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
23	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
24	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
25	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
26	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
27	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
28	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
29	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
30	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
31	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
32	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
33	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
34	All Service	Barr, Char	########	10044	LDF	1.73	48	$83.04			Paid	########
35	All Service	Barr, Char	########	10044	LTB	20.49	2	$40.98			Paid	########
36	All Service	Barr, Char	########	10044	LTB	20.49	2	$40.98			Paid	########

LocalFundingClaimHistory_759919

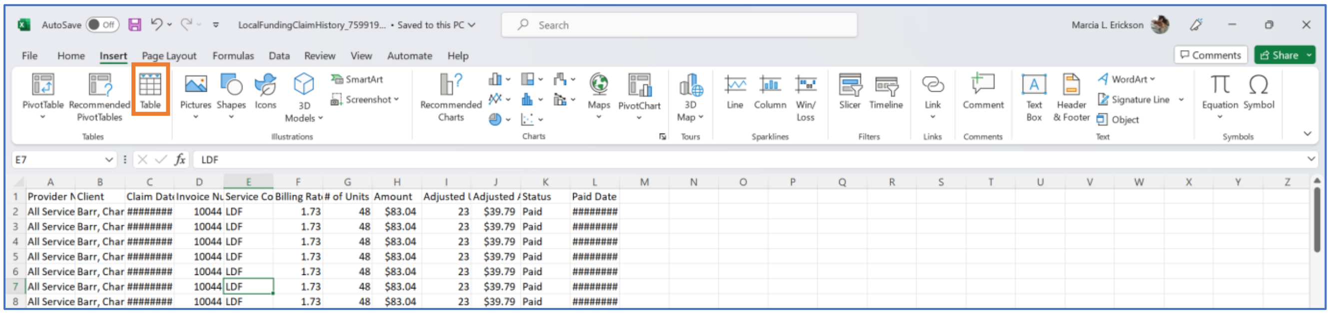
To work with this data, you should do three things:

- Click **Save As...** and save the file as an Excel Workbook. You can also take this opportunity to rename the file and move it into a different folder if you wish.

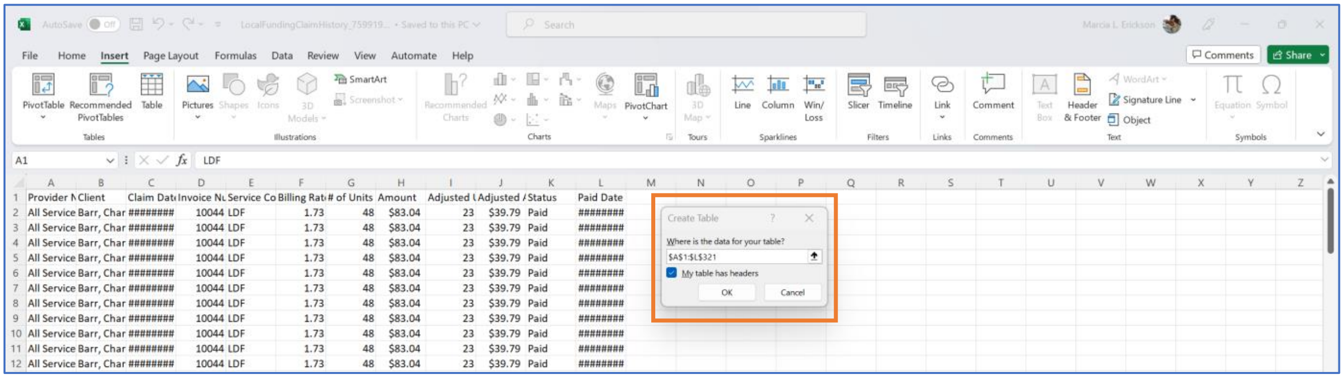




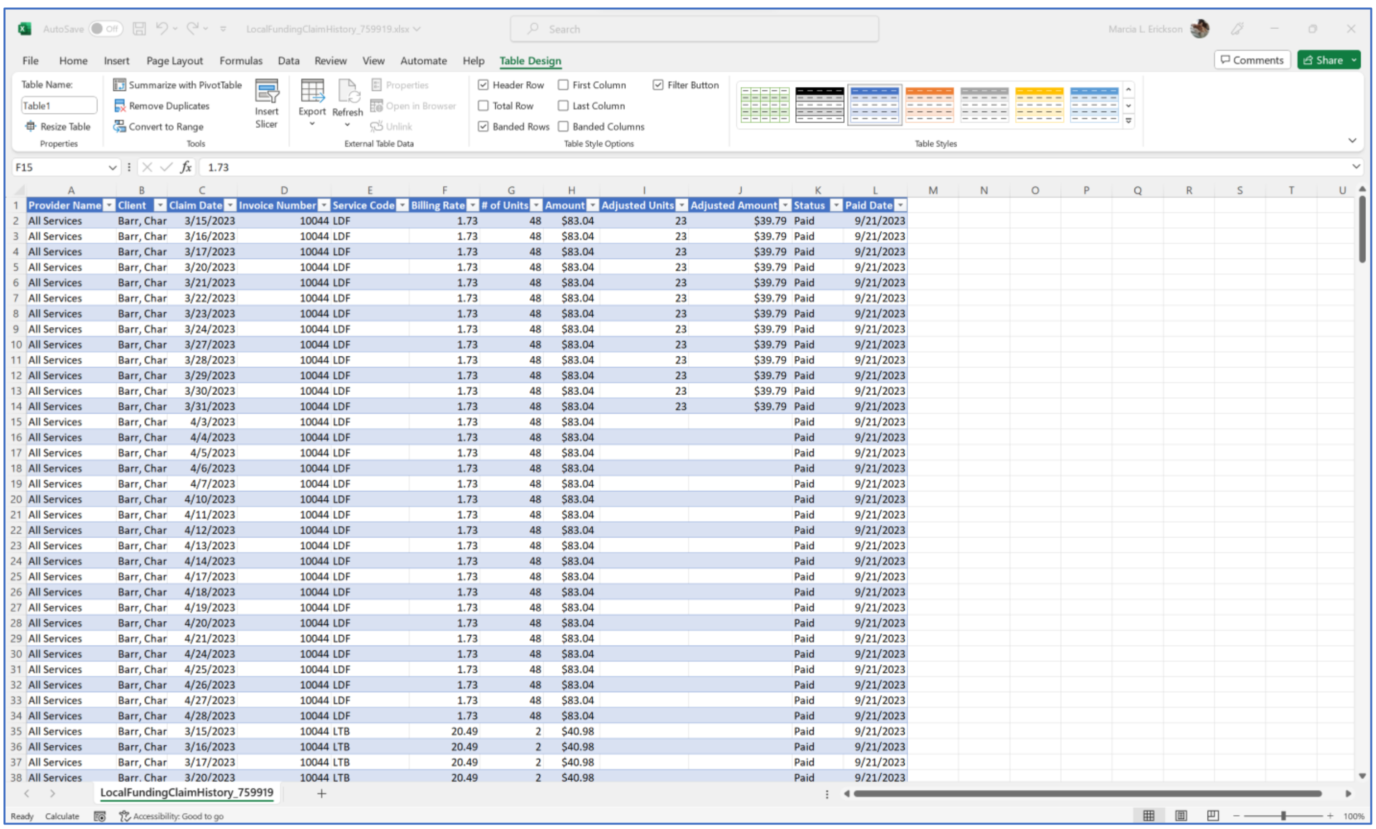
- Put your cursor in the middle of the data and choose **Insert>Table**.



- In the *Create Table* dialog box, verify that **My Table Has Headers** is checked and click **OK**.



- Now you have your data in a table that you can filter or manipulate like any other Excel file.

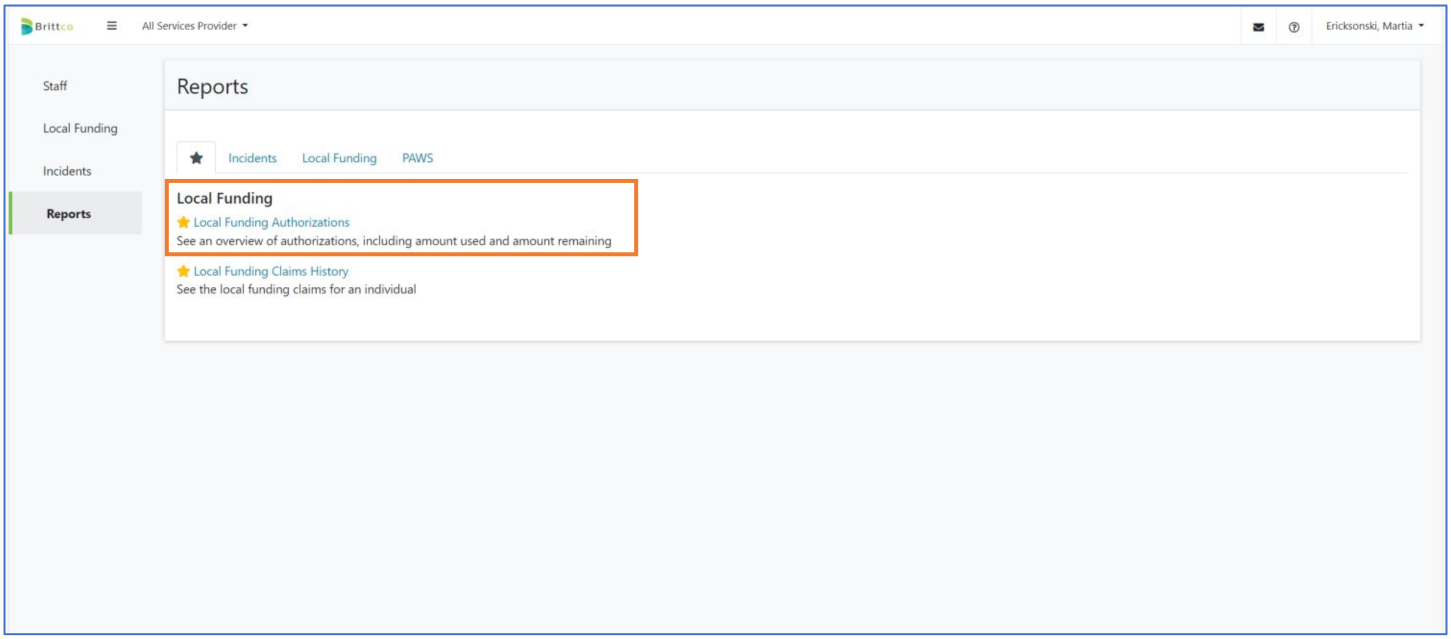


Saving Filters for Reports

As you use reports, there may find yourself reentering the same criteria every time. For those instances, you can save your filters in those reports for future use.

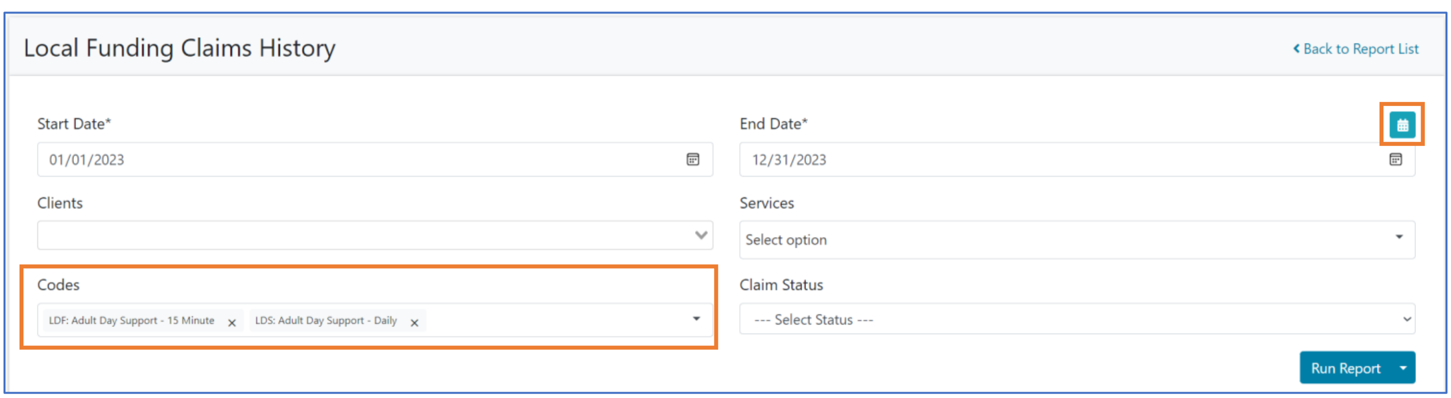
Saving a Report Filter

Let's use the *Local Funding>Local Funding Claims History* report as an example because this is a report you should be running weekly.



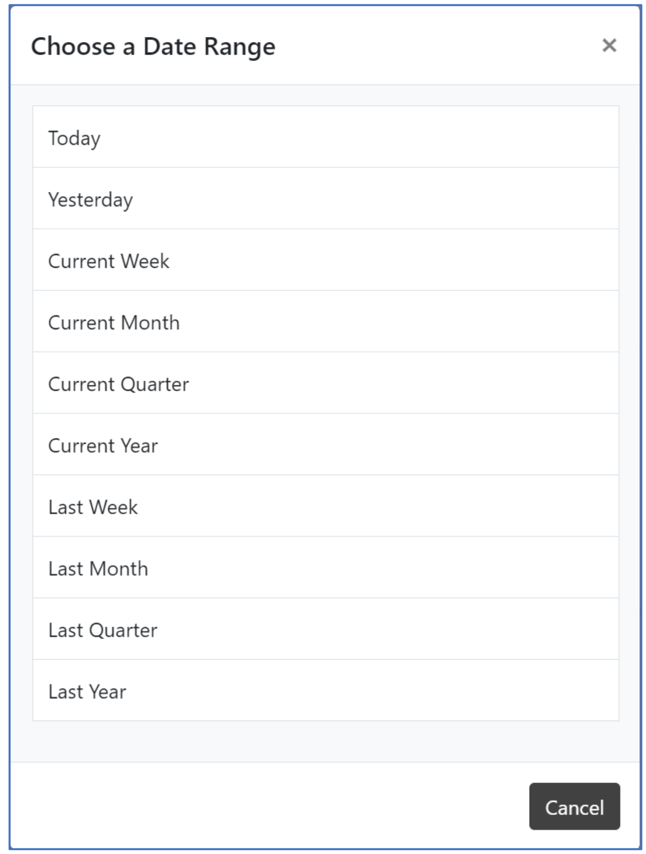
When you select the report, you'll see the basic criteria – **Start Date**, **End Date**, **Clients**, **Services**, **Codes**, **Claim Status**. In terms of use, you'll enter a time frame and the service codes you want.

For this example, we'll use *LDF: Adult Day Support – 15 Minute* and LDF: Adult Day Support – Daily as our **Codes**. In the real world, you can select whatever codes you may want to zero in on. For the Start Date and End Date, we could manually set the filters to last week but if we want to save the filters, we would be better off using the relative date **Calendar**.

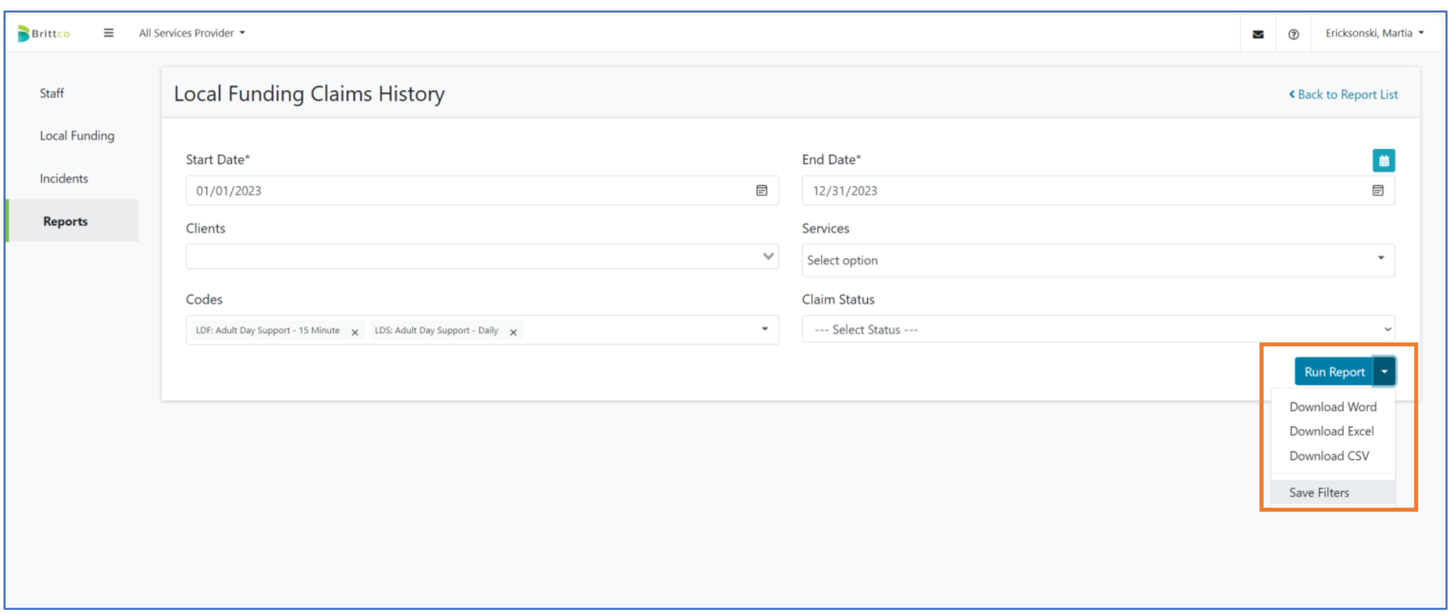


When you click on the **Calendar** icon, it opens the *Choose a Date Range* window. Select the desired time period.

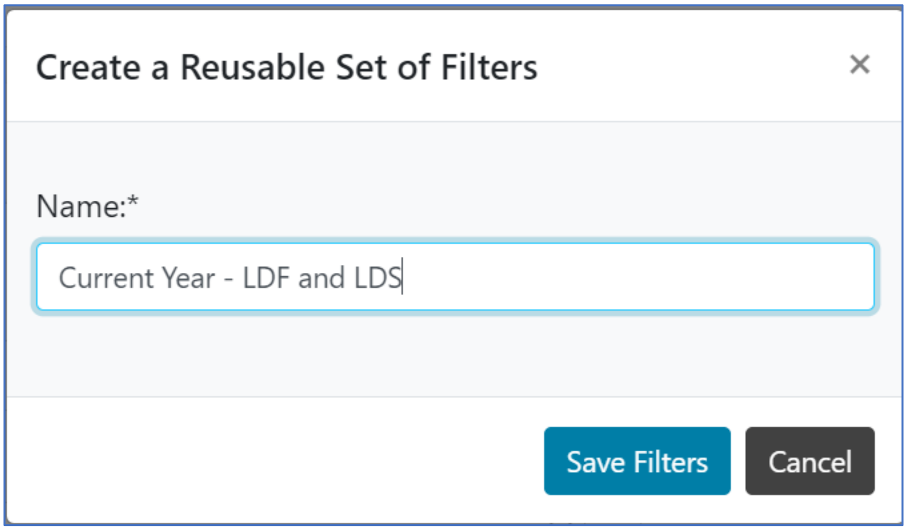
- *Current Week* pulls this week's dates starting on the Sunday of that week.
- *Current Month* pulls dates from the 1st day of the current month to today's date.
- *Current Quarter* pulls from the beginning date of the month of the quarter you're in – quarters are from January – March, April – May, June – August and October – December.
- *Current Year* pulls from January 1st of the current year to today's date.
- *Last Week* pulls last week's dates starting on Sunday and running through Saturday.
- *Last Month* pulls dates from the 1st day of the previous month to the last day of the previous month.
- *Last Quarter* pulls from the beginning date of the month of the previous quarter you're in – quarters are from January – March, April – May, June – August and October – December.
- *Last Year* pulls from January 1st of the previous year to December 31st of the previous year.



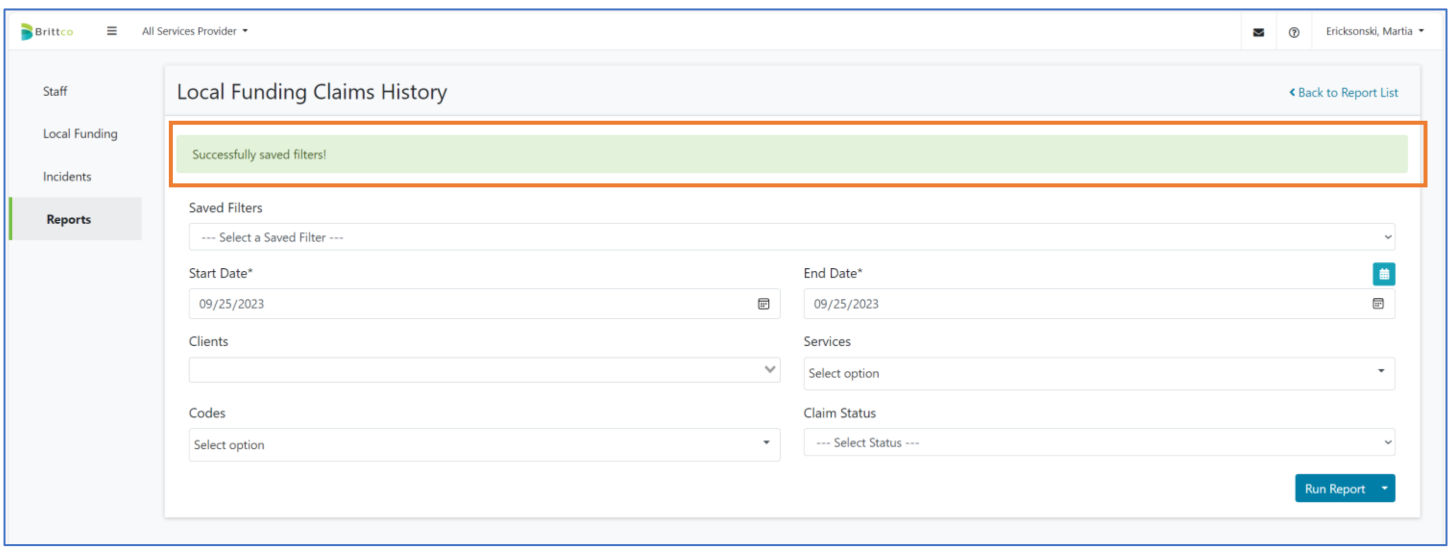
Once you have your report filters in place, click on the drop-down arrow next to **Run Report** and choose *Save Filters*.



When the *Create a Reusable Set of Filters* window opens, enter a **Name** for your saved filter. Click **Save Filters**.

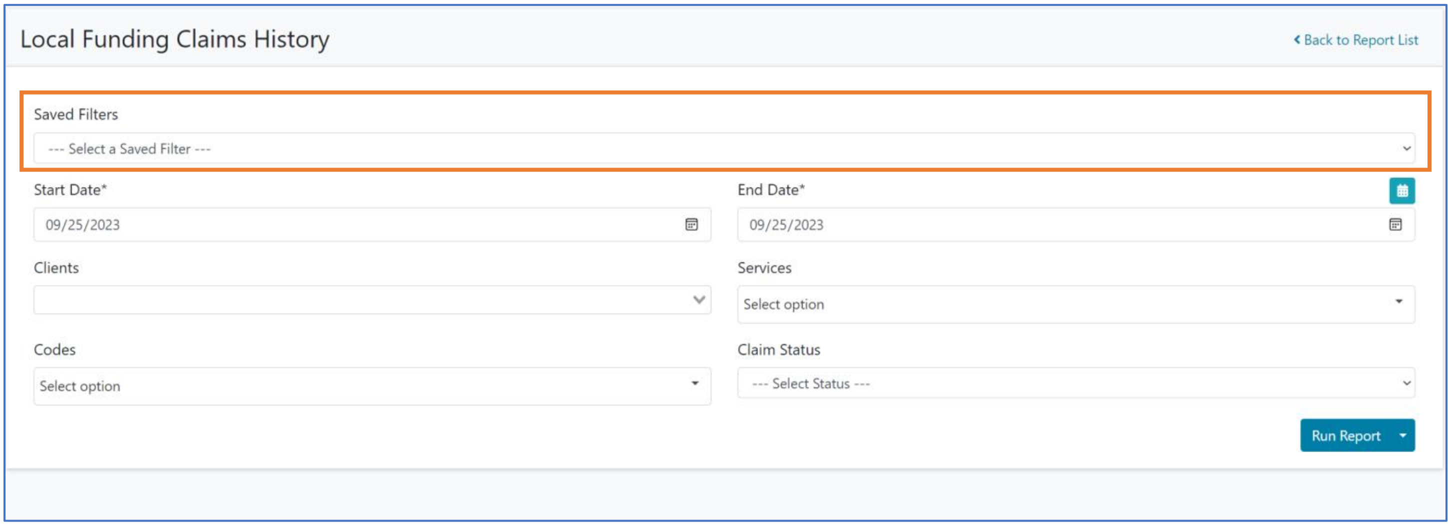


You'll get confirmation that your filter has been successfully saved.

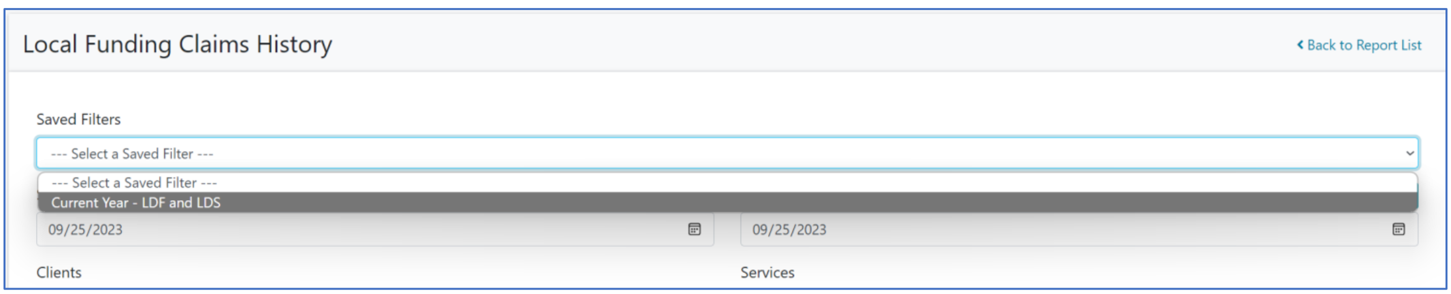


Using a Saved Filter

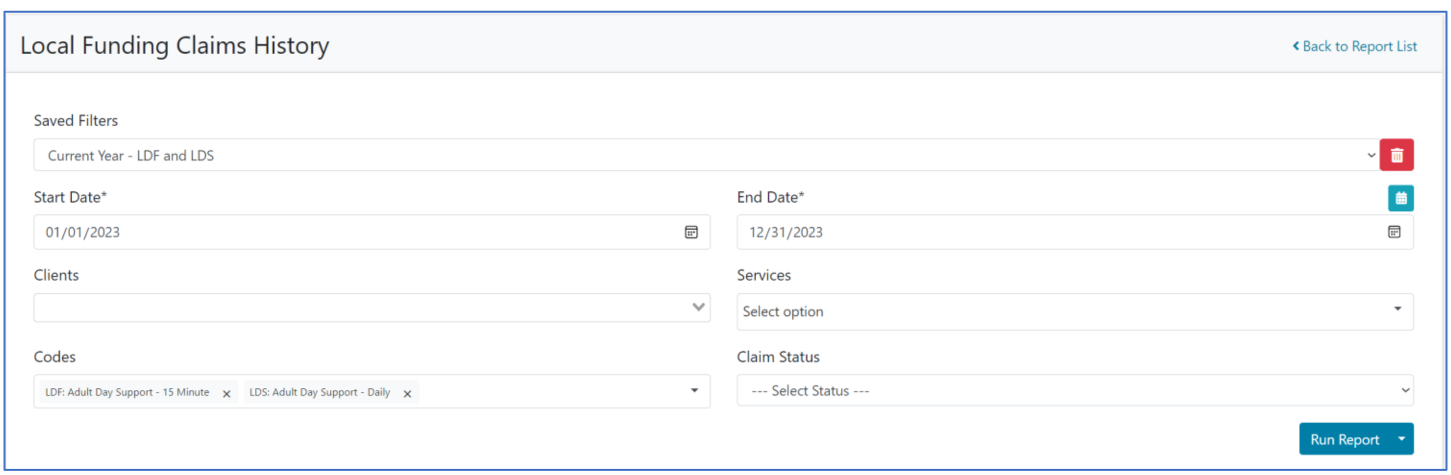
To use a filter you've saved, open the report you saved the filter in. You'll see a new filter at the top of the report titled **Saved Filters**.



Click on the drop-down arrow for **Saved Filters** and choose the filter from the list.

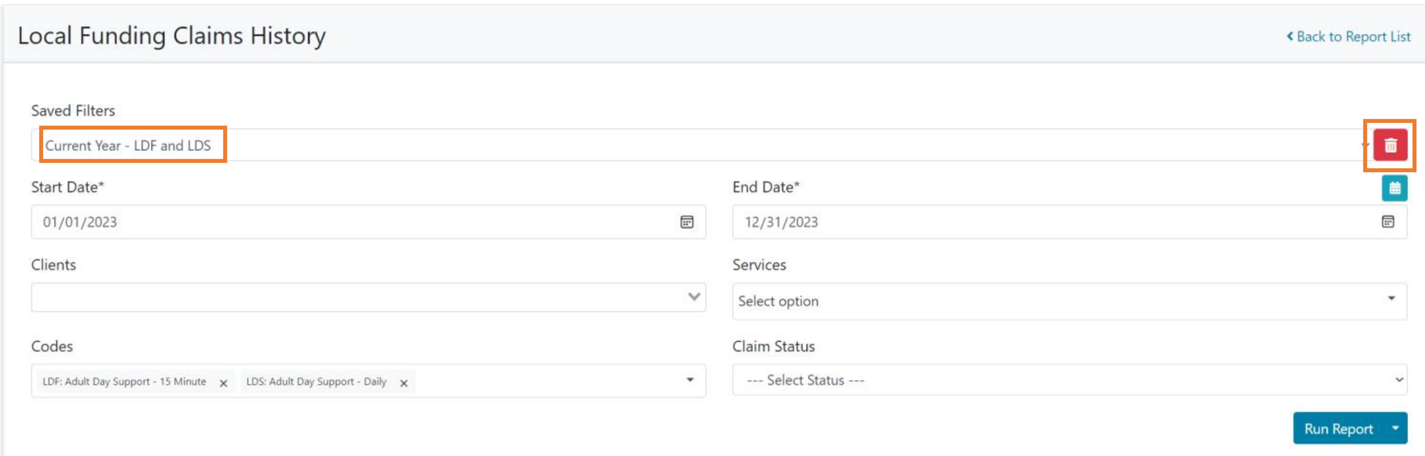


You can now click **Run Report** to execute the report with your saved filter.

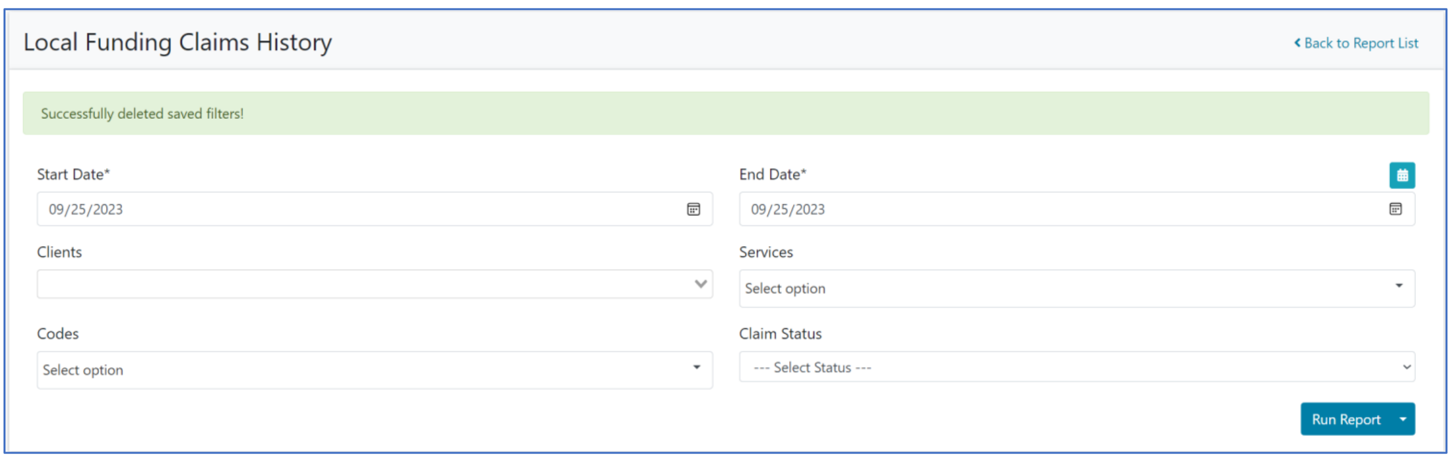


Removing a Saved Filter

If you've created a saved filter that you would like to remove, simply select it from the drop-down list and then click on the red **Trash** icon.



You'll get confirmation that the saved filter has been deleted.



Recommended Reports for Providers

While we're sure this list will grow, here's a listing of the recommended reports for Providers to use in Brittco. Feel free to make these *Favorites* by clicking on the **Star** icon next to the report names.

Local Funding Reports

Report Name	Description
Local Funding Authorizations	Displays an overview of authorizations including the amounts used and remaining. Criteria includes dates, clients, birthdates, services, codes, acuity and payment status.
Local Funding Claims History	Provides the list of local funding claims by client served. Criteria includes dates, clients, services, codes and claim status.
Local Funding Entries by Providers	Displays a listing of claims by client served, code, units, rate, amount, paid amount, paid date and invoice number. Criteria includes dates, clients, services, codes, payment status, invoice number and paid dates.
Local Funding Invoice Summary by Client	Displays any invoice. Criteria is the invoice number.
Local Funding Plans	Provides the details on locally funded plans including what services have been authorized for the provider including start and end dates. Criteria includes the calendar year and the clients.
Local Funding Utilization	Displays the units and dollars remaining per authorization. Criteria includes dates, clients, services, codes, payment status and summary or full detail.

PAWS Reports

Report Name	Description
PAWS Authorizations	Lists descriptive information from DODD including resident number, client, Medicaid number, plan year start and end, funding sources, match source, and version as well as services start and end dates, max units and fiscal year amounts.