Reporting Tool Process Guide

Provider User Guide

Contents

Reporting Tool

Overview

This category covers the **Reporting Tool** user interface in the HHAeXchange (HHAX) system, providing a high-level description of the information required to create a new report.

Please direct any questions, thoughts, or concerns regarding the content herein to HHAeXchange Customer Support.

HHAX System Key Terms and Definitions

The following provides basic definition of HHAX System key terms applicable throughout the document.

| Term	Definition
Patient	Refers to the Member, Consumer, or Recipient. The Patient is the person receiving services.
Caregiver	Refers to the Aide, Homecare Aide, Homecare Worker, or Worker. The Caregiver is the person providing services.
Provider	Refers to the Agency or organization coordinating services.
Payer	Refers to the Managed Care Organization (MCO), Contract, or HHS. The Payer is the organization placing Patients with Providers.
HHAX	Acronym for HHAeXchange

Reporting Tool User Interface

Navigate to *Report > Reporting Tool (2.0)* to open the Reporting Tool window, as seen in the following image.
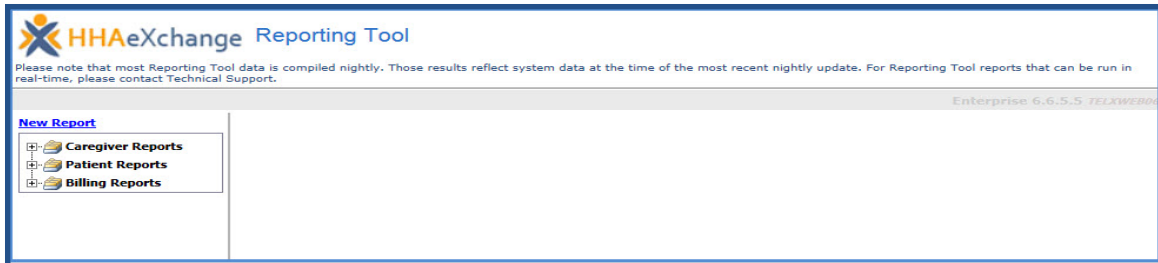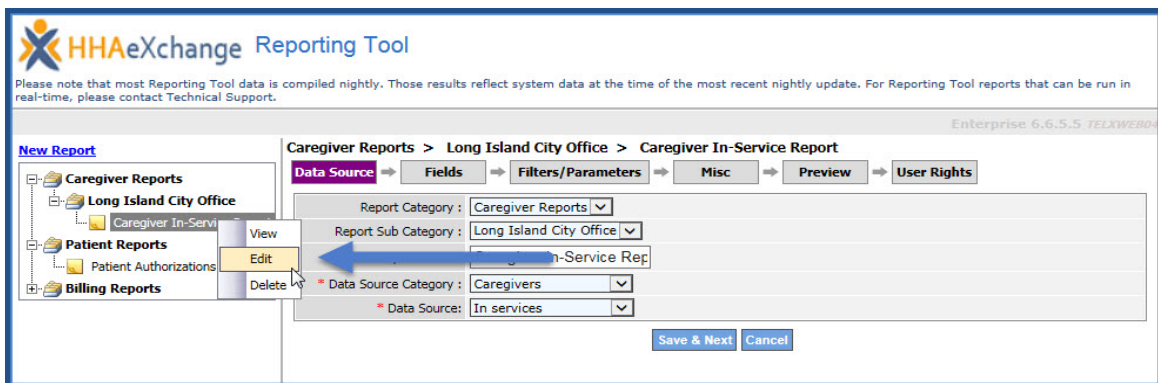

The Reporting Tool

In the *Reporting Tool* page, select the New Report link (at the top of the left navigation panel) to create a report, or select an existing report to run, edit, or delete, by expanding one of the **Report Categories**, or the folders containing the created ad hoc reports.
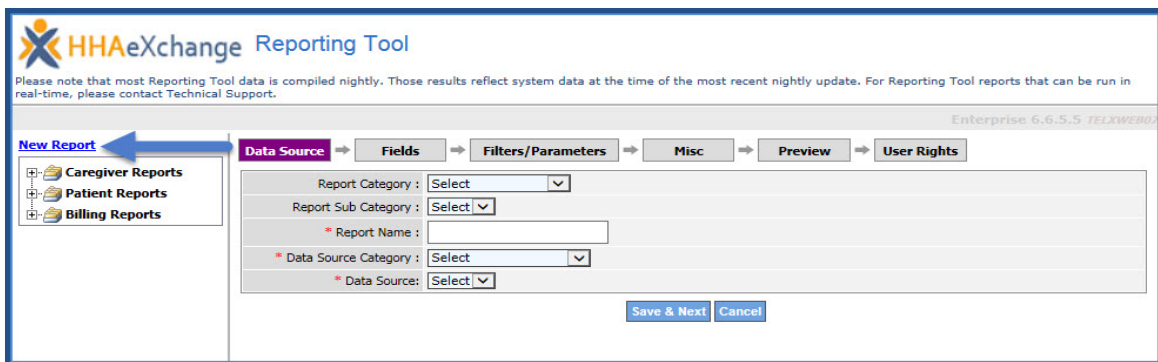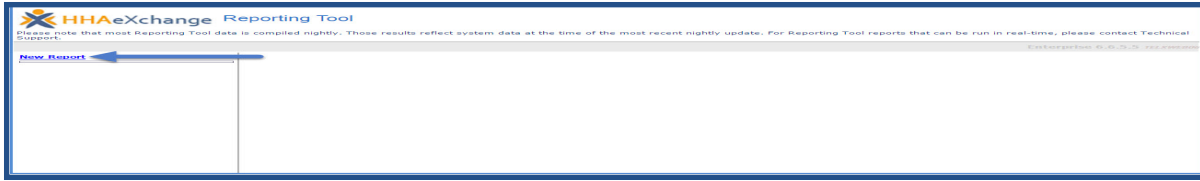

Create New Report

Select an Existing Report

When initially opening the Reporting Tool, the only option available is New Report (link). **Report Categories** are created as reports are generated in the system. The process of creating new **Report Categories** is covered in the Data Source section below.

Reporting Tool, no *Report Categories*

Reports are divided into six sections, accessible using the tabs highlighted in the image below. Four of these sections are used to set up the report, one is used to run it, and the last is used to assign report permissions. Refer to the table below the image for descriptions.
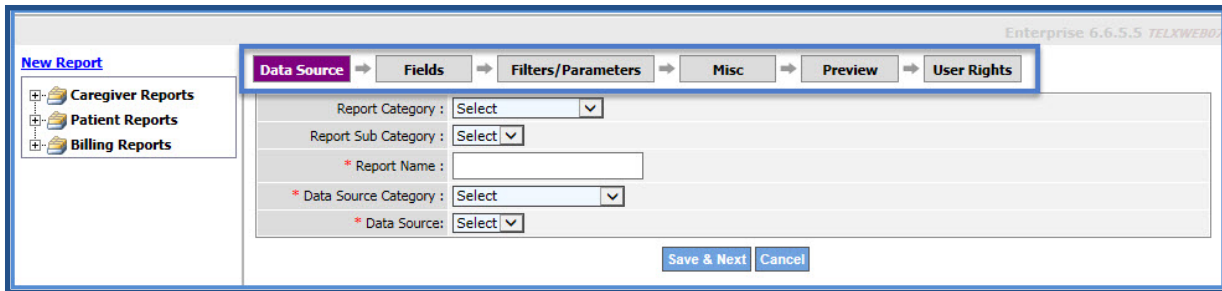
Report Tabs

Field	Description
Data Source	Create/Assign the report to a Report Category (one of the folders in the left-hand column of the Reporting Tool). Specify which Module in the system where the report is to gather information from.
Fields	Define categories into which information in the report is sorted.
Filters/Parameters	Expand the reports search results by defining limits or criteria for the information compiled from the selected **Data Source**.
Misc	Customize how the report is displayed when run.
Preview	Select to run and export the report.
User Rights	Permit or restrict access to reports on a case-by-case basis.

When creating, or editing a report, navigate to any of these sections by selecting the corresponding tab, ensuring that the required information on the current tab is complete. To proceed through the report creation process in a linear manner, use the *Save & Next* button at the bottom.
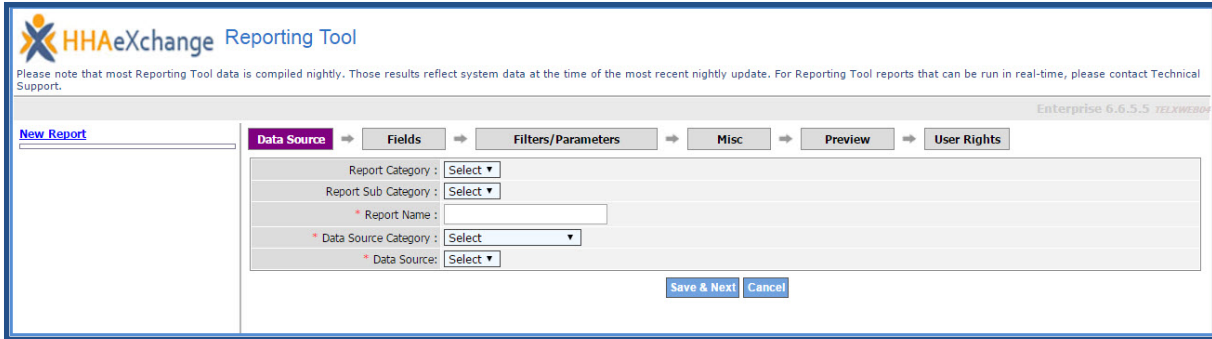
Creating an Ad Hoc Report

To create an ad hoc report, complete the below-listed sections within the tool. Navigate to each section in this document for details and instructions per section.
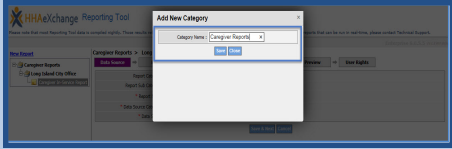
- Data Source
- Fields
- Filters/Parameters
- Misc
- Preview
- User Rights

The Data Source Section

The **Data Source** section is used to assign the report to a new or existing **Report Category**, and to specify from which Module in the system the report is retrieving information. Refer to table under the image for field descriptions.

The Data Source Tab

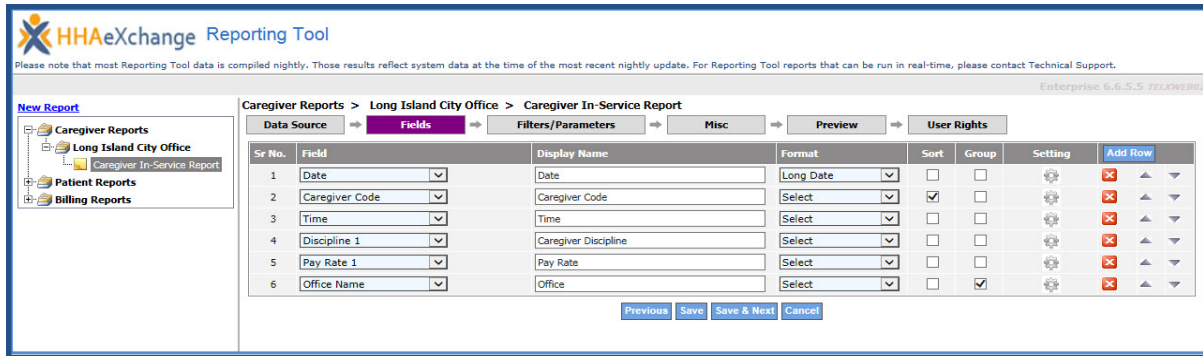| Field	Description
Report Category	Sorting tool allowing to file similar reports in a single location. Select an existing **Report Category** from this field or create a new category by selecting the *New* value. Every **Report Category** appears as a folder in the left navigation panel under the New Report link. When creating a new Report Category, the *Add New Category* window opens, prompting for a **Category Name**, as seen in the image on the right. **Adding a New Category**
Report Sub Category	Create a sub-level within a **Report Category**. As with **Report Category**, new values for this field can be created by selecting *New* from the dropdown. Values for this field are tied to the selected **Report Category**. *Note: The **Report Category** and **Report Sub Category** fields are not required. If no values are selected for these fields, the report automatically is filed under a **Default** folder.*
Report Name	The name of the report as it appears within the **Reporting Tool**.
Data Source Category	Specify the Module within HHAX from where the report collects information.
Data Source	Specify what information within the selected **Data Source Category**, or system Module, the report is collecting information from. These values correlate

Field	Description
	to the selected **Data Source Category.**
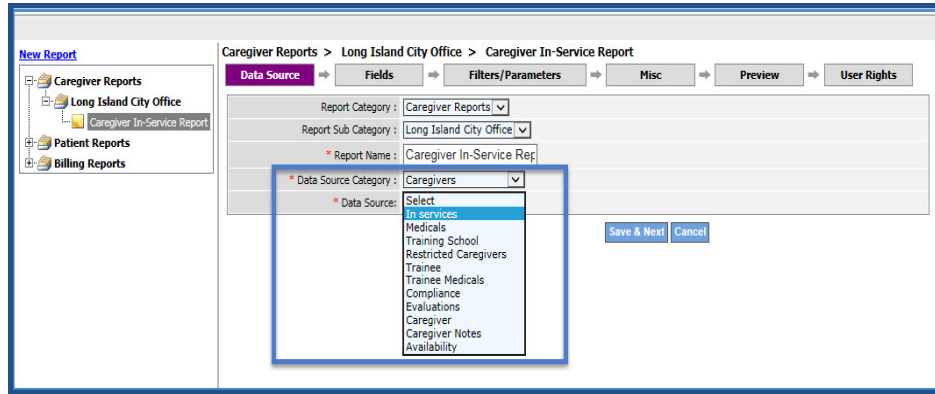
Data Sources tied to the *Caregiver* Data Source Category
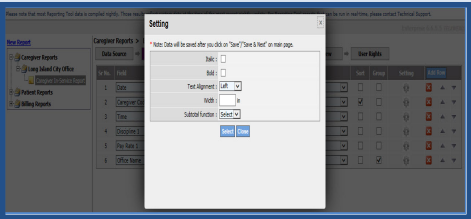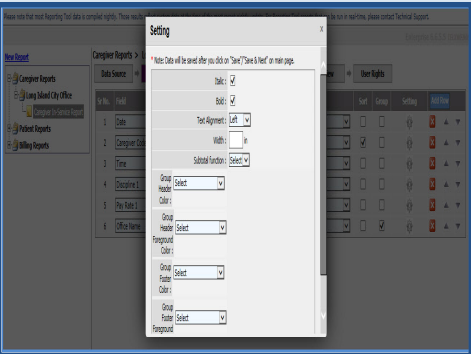
The Fields Section

The **Fields** section is used to specify what information from the selected **Data Source** is collected for the report. This section is also used to define how the **Field** information is formatted, sorted, and grouped.
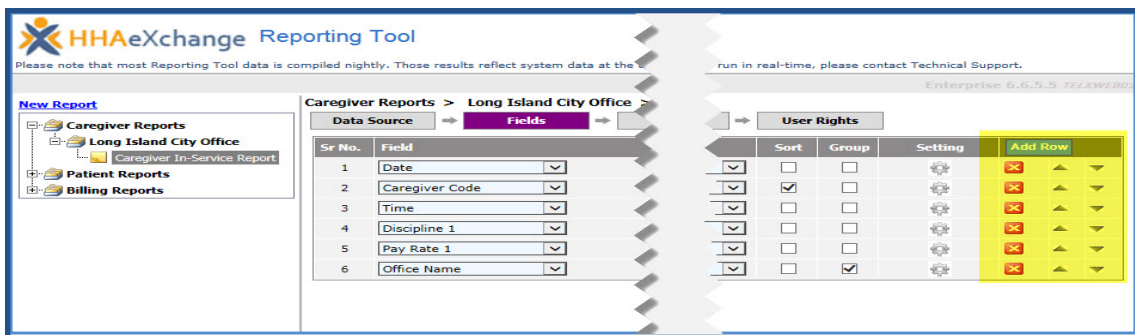

The *Fields* Tab

Define the following to set up a new Field.

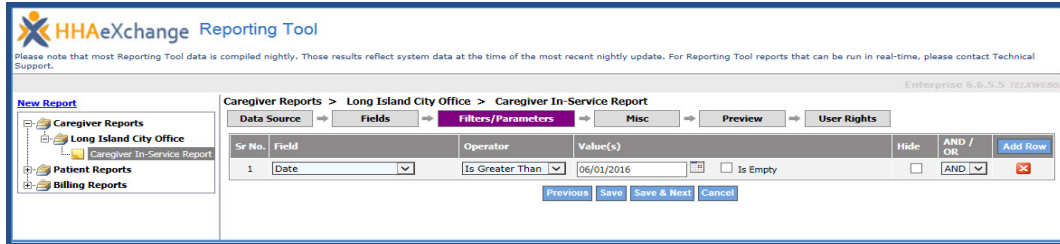| Field	Description
Field	Select a Field for the report.
Display Name	The name of the selected **Field** as displayed in the report. By default, the **Display Name** reflects the selected field. This value can be edited as needed.
Format	Specify how information in the related field is formatted. For example, fields containing date information can be customized to display in one of several ways. *Note: The **Format** option is not available for every **Field**.*
Sort	Select this checkbox to sort the results of the field in ascending order. Selecting this checkbox for multiple **Fields** prompts the system to sort based on the **Sr. No**, located in the left-most column of this section.
Group	Select this checkbox to group report information based on the associated **Field**. For example, to run a report to review Caregivers based on the Office they work for, then select the **Group** checkbox for the **Office** field, ensuring that Caregivers are grouped together based on this criterion.

Field	Description
Setting	Select the icon to define additional formatting requirements to include italicizing or bolding the field text, adjusting alignment or cell width, and specifying a Subtotal Function as well as adding a count to the field. **Field Setting** Fields defined as a **Group** contain additional **Setting** options to also add colors. **Group Field Setting**
Add Row (Button)	Click the *Add Row* button to add more fields.
Delete (Icon)	Click on the delete () icon to remove unwanted fields from the report.
Field Arrangement (Arrow buttons)	Use the up/down arrow buttons to rearrange fields. Click the up arrow to move the field one place right in the report.

Add, Delete, or Move Field
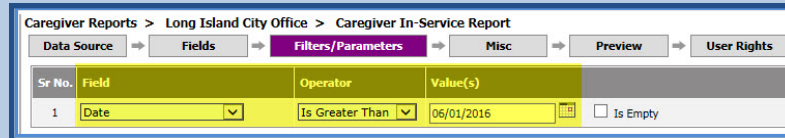
The Filters / Parameters Section

The **Filters / Parameters** section is used to set parameters for the set report **Fields**. Setting up filters and parameters ensures that only relevant information is collected in the report.
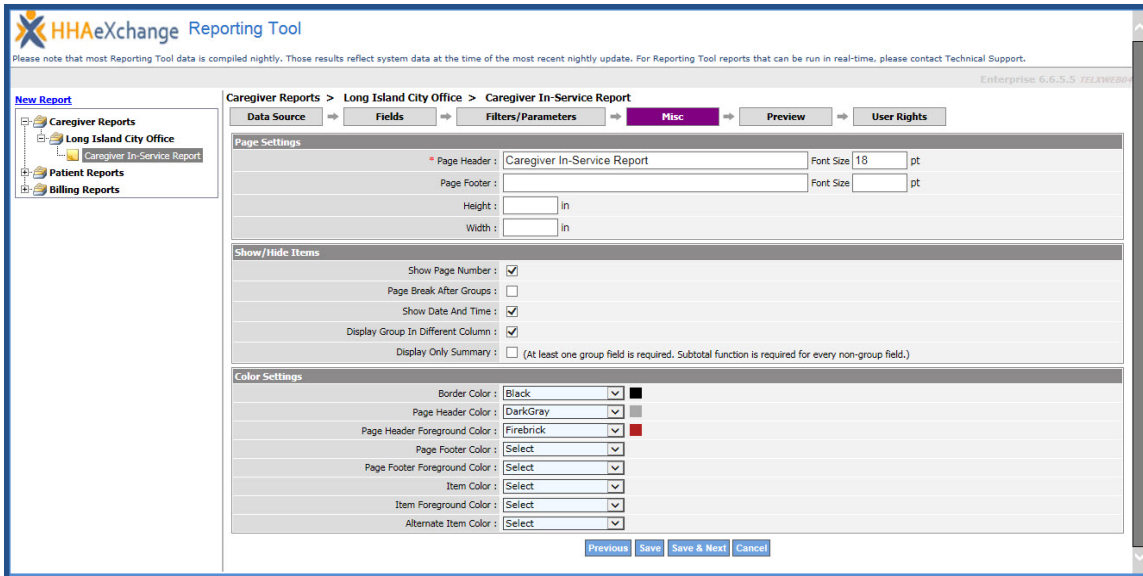

The Filters/Parameters Section

Define the following to set up a new **Filter / Parameter**.

Field	Description
Field	Select a **Field** from the dropdown. This dropdown allows the selection of any field associated with the **Data Source**, even if not used by the report.
Operator	Define the relation between the selected **Field** and the set **Value**.
Value(s)	Enter the **Value** of the selected **Field**. Depending on the selected **Field**, enter a date, select a predefined value, or manually enter. Once the **Value** is set, the new parameter can be saved. The following image illustrated the selected Value for a report that provides all Caregiver In-Services dating back to *06/01/2016*:
Is Empty	Select this checkbox to return "empty" results for the **Field** when there is no value. For example, to run a report to review *Alt. Caregiver Codes* and see Caregivers who are missing a value for this field.
Hide	Select this checkbox to hide the parameter; does not appear under the **Preview** Tab. Refer to the Preview Section below.
AND / OR	Link multiple parameters using the **AND / OR** values. Linking two or more parameters with the **AND** value means all the parameters must be satisfied to return results. If the parameters are linked with an **OR**, then the report yields either one parameter **OR** the other.
Add Field	Click the ***Add Row*** button to add more **Fields**.
Remove Field	Click on the delete icon to remove unwanted **Fields** from the report.

The Misc Section

The **Misc** section is used to customize the look and organization of the report. This section is divided into three sub-sections: **Page Settings, Show/Hide Items,** and **Color Settings**.


The *Misc* Section

Field	Description
Page Settings	• ***Page Header:** (Required) Set the text for the header of the report. By default, the **Report Name** is applied to the field. Enter/adjust the font size for header. • **Page Footer:** Set the text for the footer of the report. Enter/adjust the font size for footer. • **Height:** Set the height of the header/footer. • **Width:** Set the width of the header/footer.
Show/Hide Items	• **Show Page Number:** Select checkbox to include the page numbers in reports. • **Page Break After Groups:** Select checkbox to separate **Group** by page. • **Show Date And Time:** Select checkbox to include the date / time the report was run. • **Display Group In Different Column:** Select checkbox to sort multi-level groupings into different columns. • **Display Only Summary:** Select checkbox to review a summary of each fields **Subtotal Function**. To use this function, one field must be designated as a **Group** and all fields must have a **Subtotal Function** value.

Field	Description
Color Settings	• **Border Color:** Select the border color around the report. • **Page Header Color:** Select the page header color. • **Page Header Foreground Color:** Select the page header foreground color. • **Page Footer Color:** Select the page footer color. • **Page Footer Foreground Color:** Select the page footer foreground color. • **Item Color:** Add a color to every other row values. • **Item Foreground Color:** Select a color for the foreground. • **Alternate Item Color:** Add a color to every other row values; works in tandem with the **Item Color** field.

The Preview Section

The **Preview** section is used to review and export reports and to review existing filters set up in the **Filters / Parameters** section.
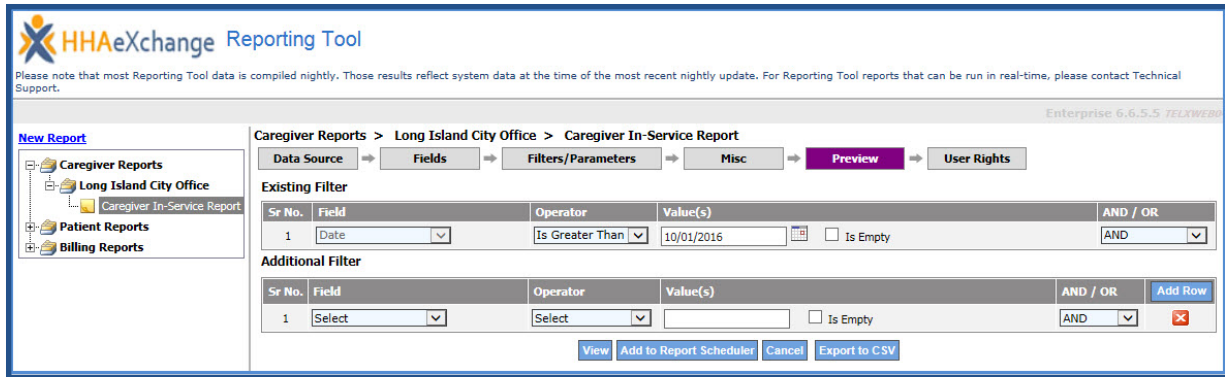
The *Preview* Section

Field	Description
Existing Filters	All **Filters / Parameters** created for the report are listed in this section for review purposes only.
Additional Filters	Create additional filters in this section before previewing or exporting the report. The filters created in this section are cleared once the report is closed.
View	Generates a copy of the report within the tool allowing assessment of the report before exporting it. Use the toolbar within the report to navigate between result pages, export, and refresh the data.
Add to Report	Use this button to add the ad hoc report to the **Report Scheduler**, a function
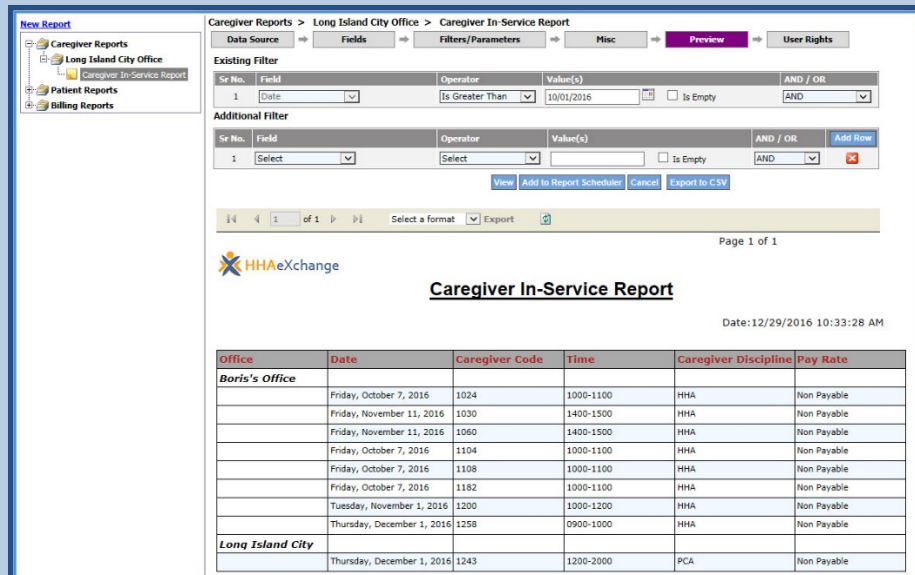
| Field	Description
Scheduler	which allows Agencies to define automated scheduling logic for reports.
Export to CSV	Click this button to export the report as a CSV file. *Note: Exporting the report in this format may remove any customized formatting/color options applied in the **Misc** section.*
Cancel	Click to exit the report.

The User Rights Section

The **User Rights** section permits Agencies to set the level of user access/permissions for the report. From here, Agencies can select the user permissions to *View/Run*, *Edit*, and/or *Delete* the report. Rights are granted on a Role basis or by individual user.
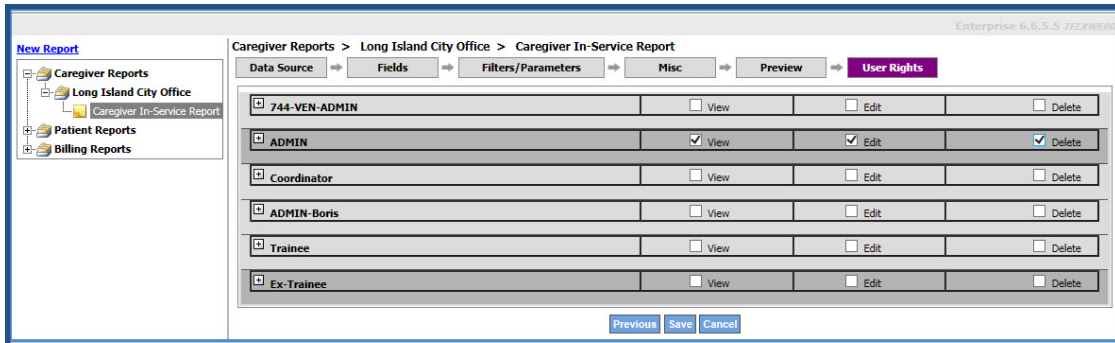
User Rights Section

To grant report rights on a Role basis, select the *View*, *Edit*, and/or *Delete* checkboxes at the Role level, as seen in the following image. Selecting at a Role level assigns rights to the entire Role group.
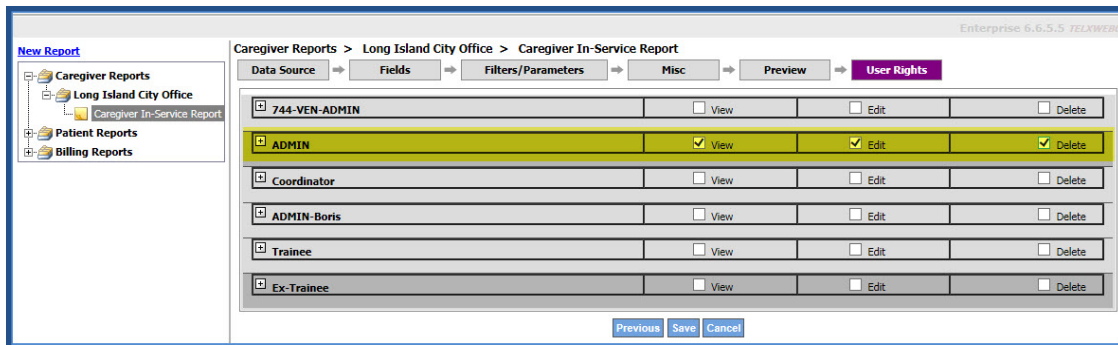
Assign User Rights to Role

To grant report rights to an individual user, click on the plus to expand the Role category and locate the individual(s). Select the *View*, *Edit*, and/or *Delete* checkboxes, as seen in the following image.

Assign Rights to Individual Users