



**Health Engagement and
Reporting Tool | HEART**

User Guide to the CCOP County Portal

December 2025

Version Information

Version	Added or Updated Section(s)	Effective Date
1.0	N/A	

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1. Purpose and Intended Use

This document serves as a comprehensive guide for county users on accessing and effectively using the CCOP County Portal.

Note: The images in this guide are from a test environment and are for illustrative purposes only. The information shown does not represent live data.

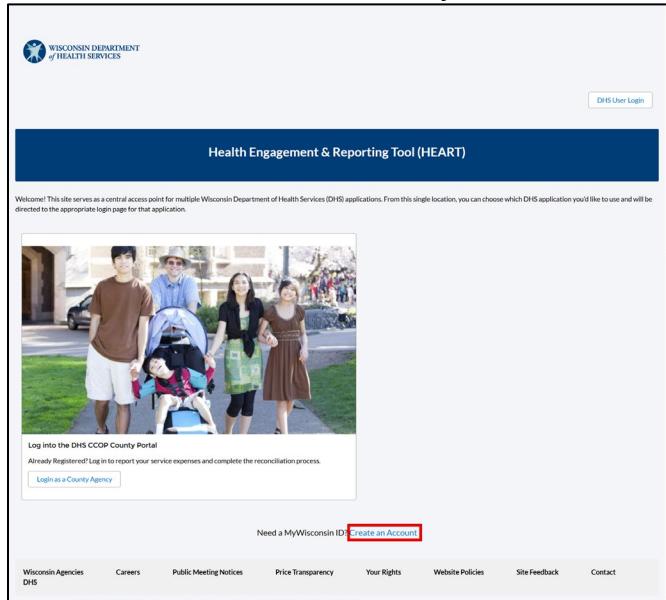
2. Logging in for the First Time

County users must have a MyWisconsin ID to access the CCOP County Portal. Those Users who do not already have a MyWisconsin ID must create one before proceeding.

If you already have a MyWisconsin ID, please refer to section 2.2 in this document.

2.1 Creating a MyWisconsin ID

1. Go to the landing page at <https://bfamboss.my.site.com/HEART> and select **Create an Account** next to "Need a MyWisconsin ID?"



2. On the "MyWisconsin ID Sign In" page, select **Sign up**.

3. On the “Sign up” page, enter a first name, last name, and a **non-State** (DHS) email address; then select **Sign Up**.



WISCONSIN

Sign up

First name

Last name

Email

Sign Up

Already have an account?

4. On the “Set up security methods” page, select **Set up** under Email.



WISCONSIN

Set up security methods

Security methods help protect your account by ensuring only you have access.

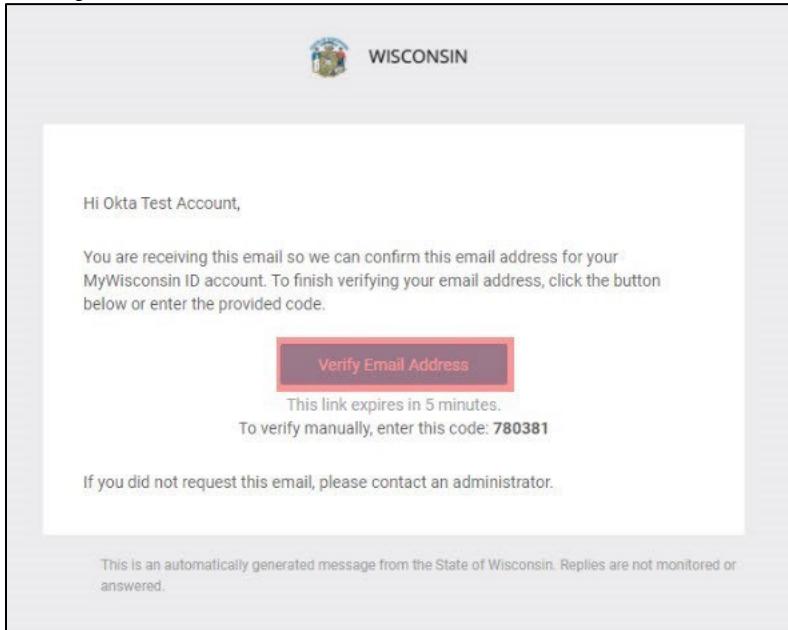
Set up required

Email
Verify with a link or code sent to your email
Set up

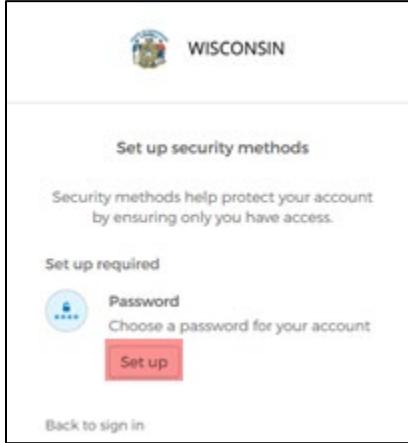
Password
Choose a password for your account
Set up

Back to sign in

5. Open the email entered in Step 3, check for the verification email, and select **Verify Email Address**.



6. In the "Set up security methods" page, select **Set up** under Password.



7. Enter a unique password in the "Set up password" page, re-enter it, and select **Next**.



WISCONSIN

Set up password

Password requirements:

- At least 16 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Your password cannot be any of your last 24 passwords
- At least 2 hour(s) must have elapsed since you last changed your password

Enter password

Re-enter password

Next

[Back to sign in](#)

8. On the "Set up security methods" page, choose a multifactor authentication (MFA) method. Be sure to confirm access to the MFA device before choosing.



WISCONSIN

Set up security methods

Security methods help protect your account by ensuring only you have access.

Set up required

Google Authenticator
Enter a temporary code generated from the Google Authenticator app.

Set up

Okta Verify
Okta Verify is an authenticator app, installed on your phone, used to prove your identity

Set up

Phone
Verify with a code sent to your phone

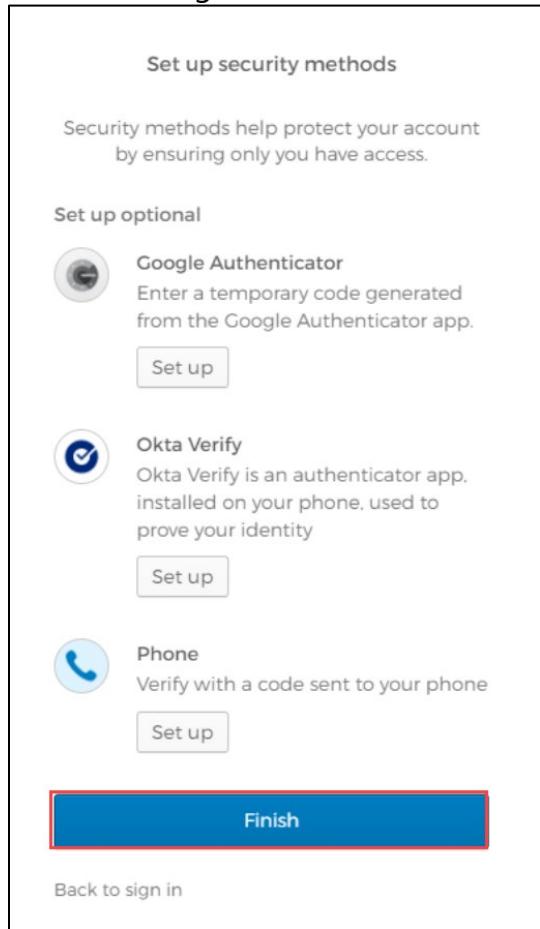
Set up

Security Key or Biometric Authenticator
Use a security key or a biometric authenticator to sign in

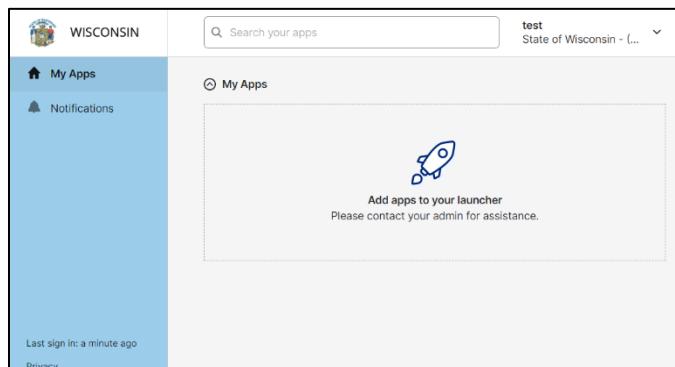
Set up

[Back to sign in](#)

9. After choosing an MFA, select **Finish**.



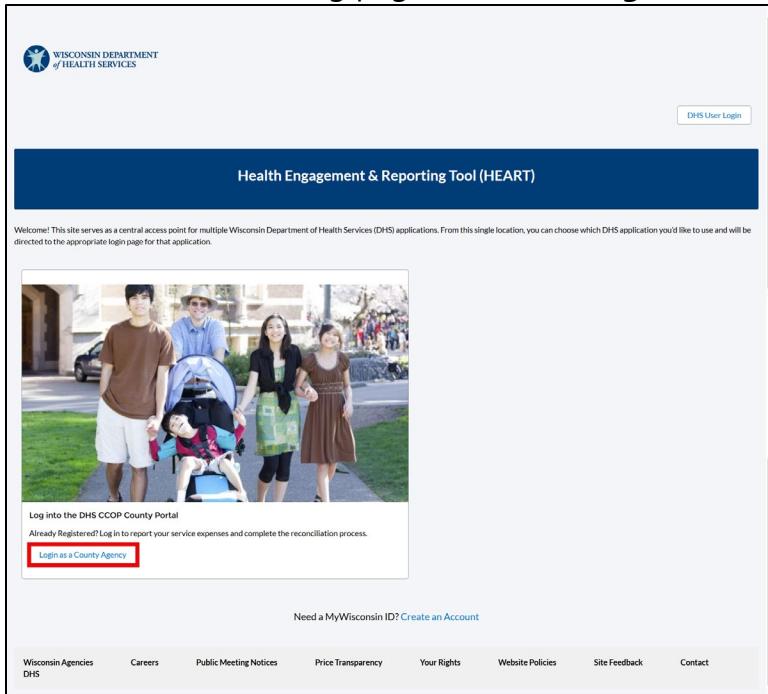
This will complete the setup of the MyWisconsin ID account registration. Close the My Apps dashboard and log in to the CCOP County Portal



Note: Contact the MyWisconsin ID Account Service Desk at 608-471-6667 if you experience any issue setting up your MyWisconsin ID and password.

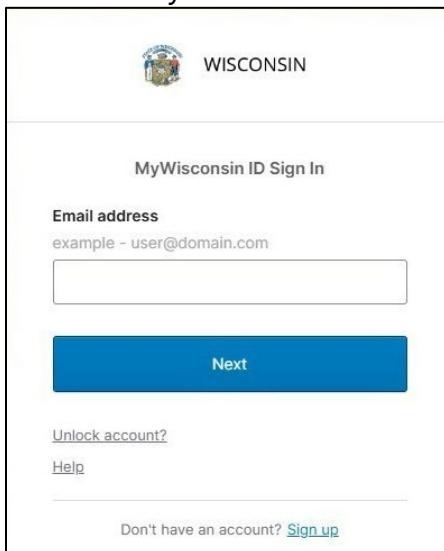
2.2 Logging in

1. Go to the landing page and select **Login as a County Agency**.

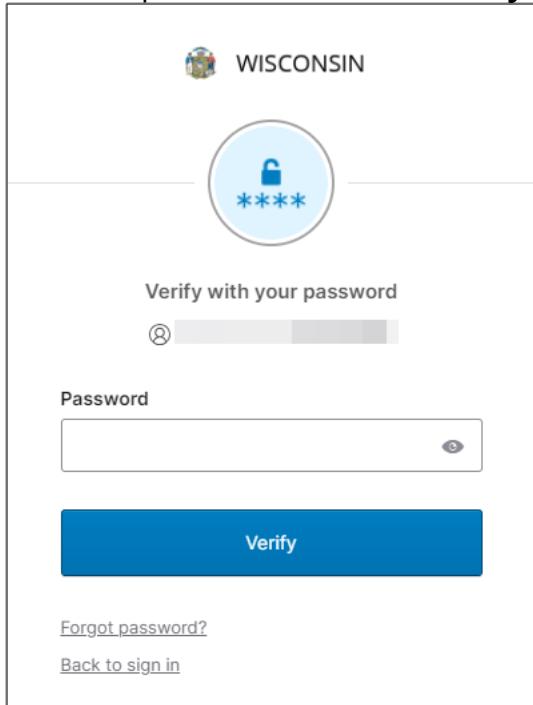


Note: If your browser has an open MyWisconsin ID session, you will go directly to the CCOP County Portal home page without being prompted to log in (Steps 2-5).

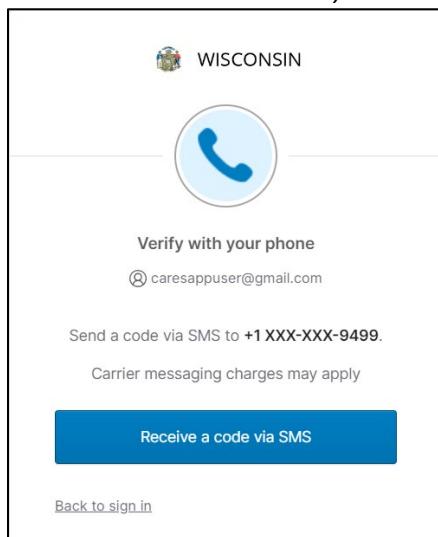
2. Enter the MyWisconsin ID.



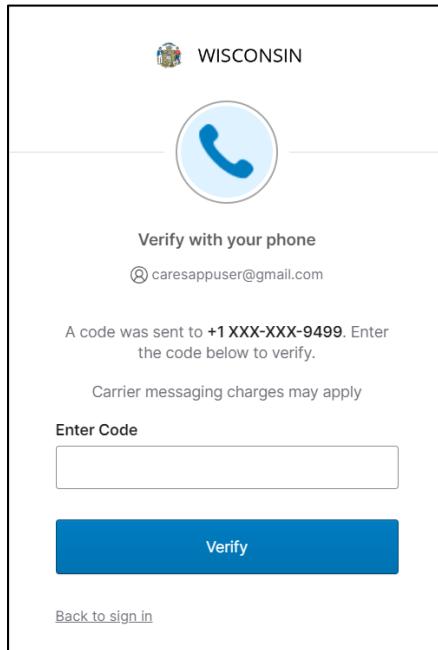
3. Enter the password and select **Verify**.



4. Select **Receive a code** (this will be based on the user's configured Multi-Factor Authentication method).



5. Enter the code from the MFA method you choose and select **Verify**.

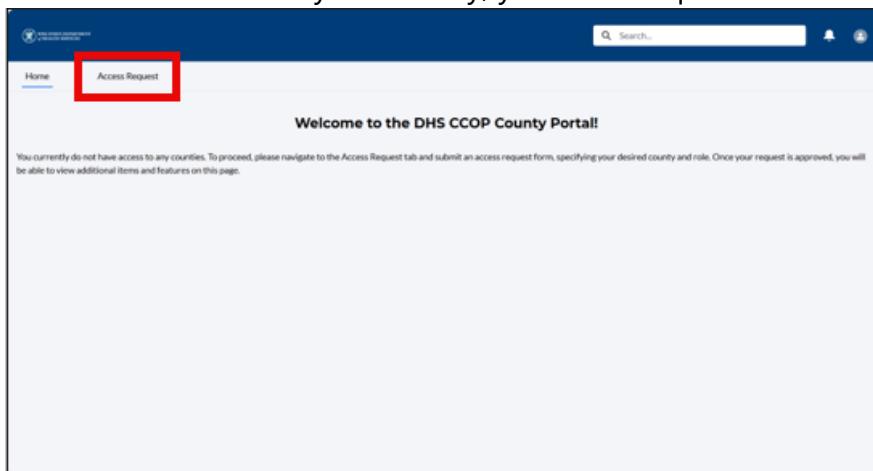


The image shows a mobile device screen displaying a verification code for Wisconsin. The screen has a white background with a thin black border. At the top, there is a small Wisconsin state icon and the word "WISCONSIN". Below this is a blue circular icon with a white phone receiver inside. Underneath the icon, the text "Verify with your phone" is displayed, followed by an email address "caresappuser@gmail.com". A message below states "A code was sent to +1 XXX-XXX-9499. Enter the code below to verify." A note at the bottom says "Carrier messaging charges may apply". There is a text input field labeled "Enter Code" with a placeholder box, and a blue "Verify" button below it. At the bottom of the screen, there is a link "Back to sign in".

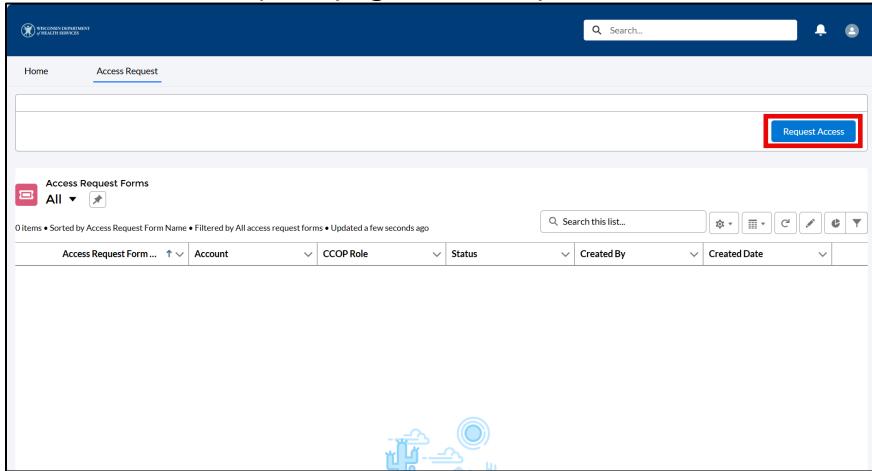
6. If the authentication is successful, you will be directed to the County Portal Home page.

2.3 Submitting an Access Request Form

When you log into the portal for the first time, you will see the following screen. To view information related to your county, you must request access to it.

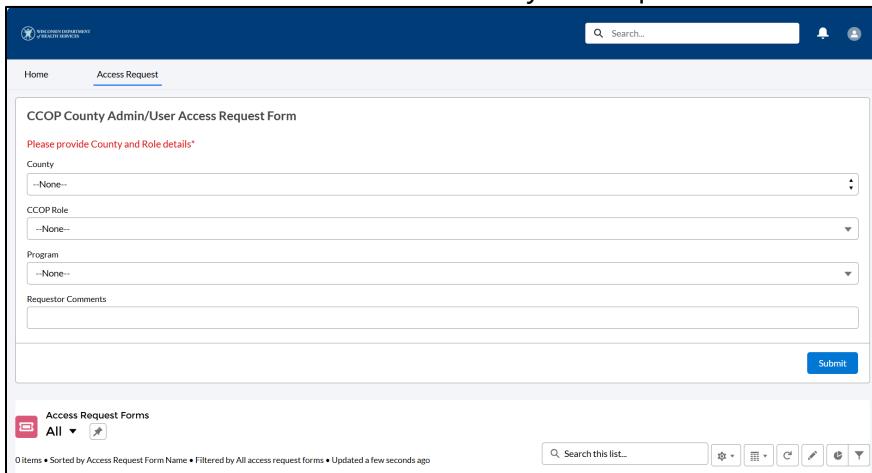


1. On the Access Request page, click Request Access.



The screenshot shows a web-based application interface for requesting access. At the top, there are navigation links for 'Home' and 'Access Request'. Below this is a search bar and a red box highlighting the 'Request Access' button. The main area is titled 'Access Request Forms' and shows a list of items with a search bar and filter options. A decorative icon of a person at a computer is visible at the bottom.

2. In the form, select the appropriate county, role, and program. Add any Requestor Comments, and click Submit to send your request.



The screenshot shows the 'CCOP County Admin/User Access Request Form'. It includes fields for 'County', 'CCOP Role', and 'Program', each with a dropdown menu. There is also a 'Requestor Comments' text area and a 'Submit' button. A red box highlights the 'Submit' button. The interface is similar to the one in the first screenshot, with a search bar and filter options at the bottom.

There are two roles to choose from: County Admin and County User. County Admins are approved by DHS and can authorize access requests for other county users in their county. County Users perform county-specific tasks and are approved by their local County Admin.

Role	Responsibilities	Approved By
County Admin	Authorize access requests for other county users in their county as well as perform county specific tasks	DHS
County User	Perform county specific tasks	Local County Admin

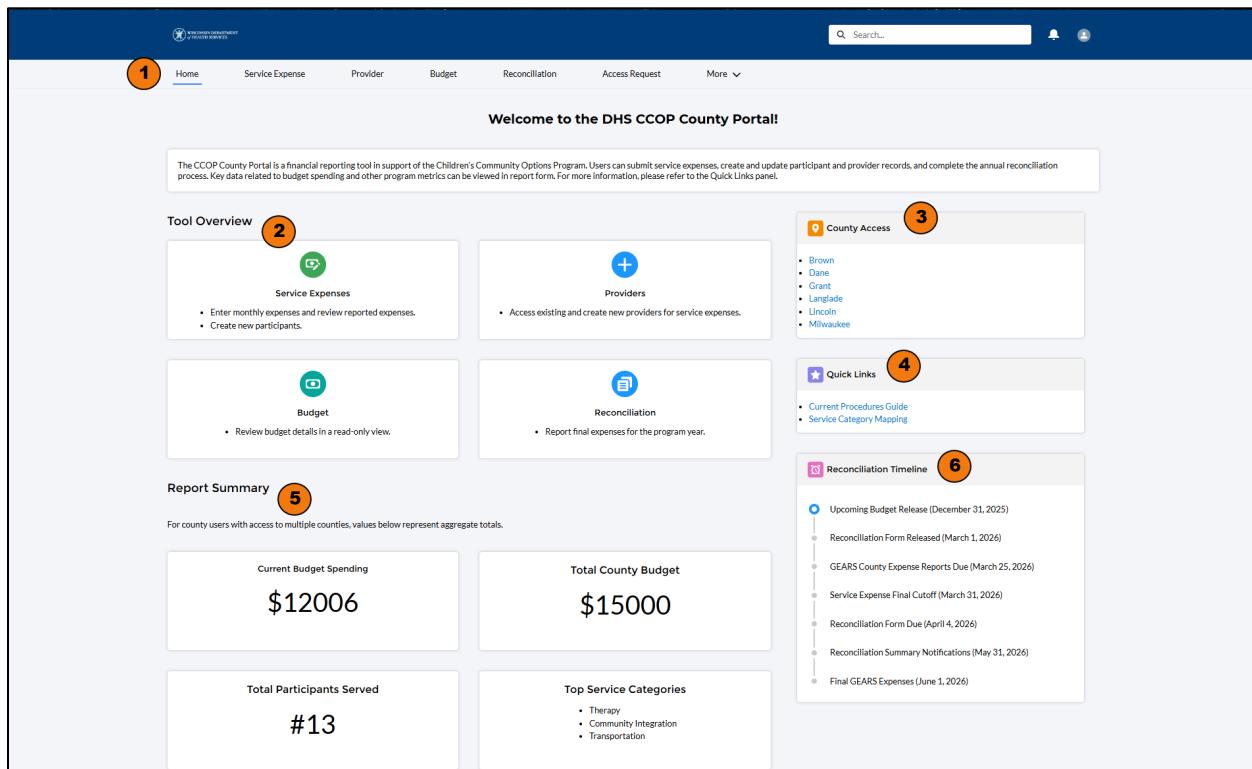
Before any other users can be approved, each county must first identify and request access for a County Admin.

After you submit your request, it will be reviewed for approval. Once a County Admin is approved, they can approve access requests for additional county users. You'll receive an email notification once your access has been approved. After receiving this notification, you can access the portal and view information related to your county.

3. Navigating the County Portal

The Home page serves as the central location for county users to monitor their CCOP activities. From here, you can access service expenses, providers, participants, budgets, reconciliation forms, and manage your access requests.

The navigation bar at the top of the screen contains the following pages: **Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and More**. Click any menu item to navigate directly to that page.



1. **Navigation Bar** - The menu located at the top of the screen that provides access to various pages in the system.
2. **Tool Overview** - This section highlights core CCOP tasks such as tracking expenses, managing providers, viewing budgets, and completing reconciliations.

3. **County Access** – Offers quick links to a county's account page. The 'Related' tab displays a list of all records associated with that county that the user can access. Most users will have access to only one county.
4. **Quick Links** - Shortcuts to help docs and reference resources for common tasks.
5. **Report Summary** - Snapshot of key county metrics. Selecting any frame in this section will open its report record.
6. **Reconciliation Timeline** - Key dates for budget release, forms, cutoffs, and final reports to guide reconciliation milestones.

Additional details for County Access (#3):

The Related tab on a county record displays a list of all records associated with that county that the user can access. Most users will have access to only one county.

Budgets (3)

Budget Name	Amount	Program	Period Start Date
Dane - CY2025	\$110,000.00	CCOP	1/1/2025
Dane CY2025 Y1	\$0.00	CCOP	1/1/2025
Dane dId	\$10.00	CCOP	1/1/2025

Related Contacts (6)

Contact Name	Account Name	Title	Email
Salvath Bhennreddy	Dane	slbhennreddy@deloitte.com	
YI County User	Dane	youssif3r3slim@chaisolutions...	
ccop nepon	Dane	neponccop1234@gmail.com	
Peter Parker	Dane	maratene@deloitte.com	
Tony Stark	Grant		
Sunny Wane	Dane	gopkrisnaweb@gmail.com	

Service Expenses (6+)

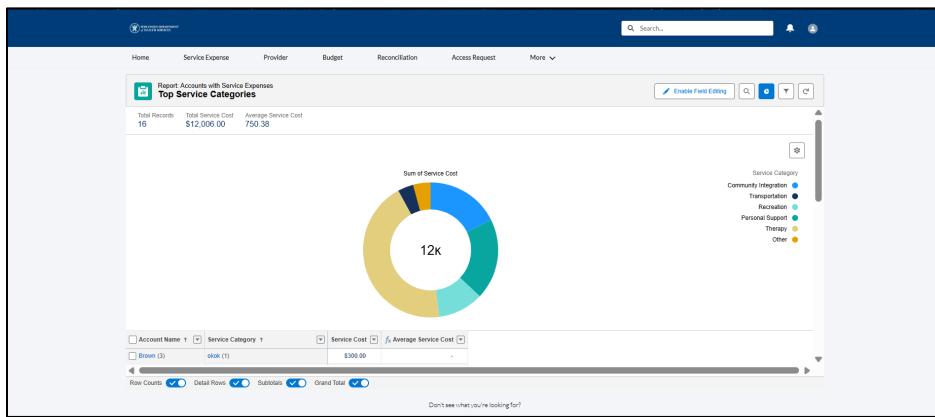
Service Expense	Participant	Budget	Service Category
SE-000001	Harri Andre	Dane - CY 2025	Community Integration
SE-000000	Cara Moran	Dane - CY 2025	Transportation
SE-000004	Neymar Jr		Transportation
SE-000006	Harri Andre	Grant - CY 2025	Transportation
SE-000005	Harri Andre		Support and Service Coordination
SE-000013	Harri Andre		Recreation

Reconciliation (6+)

Reconciliation Name	Assessment expenses	Care Plan Expenses	Total CCOP TCM revenue
Dane Item 17	\$0.00		
Dane Item 14	\$0.00		
Dane Item 04	\$0.00		
Dane Item 12	\$0.00		
Dane Item 10	\$0.00		
Dane Item 03	\$0.00		

Additional details for Report Summary (#5):

Selecting any frame in the Report Summary section will open the corresponding report record. In this example, opening a report displays both a chart and a table associated with that report.



3.1 Service Expense Page

The Service Expenses page displays documentation of services provided to children and their associated costs. County users can create new service expense records and track their submission status.

3.1.1 Service Expenses List Views

List views are lists of filtered records in a table format allowing users to view and manage data based on specific criteria. Use these to make finding records easier in categories.

The list view "pin" is a feature that allows you to quickly access your preferred list view. When you pin a list view (pin icon turned down), it saves your current view configuration so you can return to that list view when you leave the page.

Service Expenses

All

16 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

	Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Amount	
1	SE-000028		Emma Johnson	okok	10/4/2025	10/24/2025	\$300.00		
2	SE-000027			Recreation	10/20/2025	11/2/2025	\$987.00		
3	SE-000024	Grant - CY 2025		P-000...	Community Integration	10/23/2025	10/23/2025	\$123.00	
4	SE-000023		Neymar Jr	P-000...	Community Integration	10/24/2025	10/25/2025	\$1.00	
5	SE-000022	Grant - CY 2025		P-000...	Consumer and Family-Directed...	10/23/2025	10/23/2025	\$1.00	
6	SE-000017		Harris Andre	P-000...	Offsets	10/22/2025	10/22/2025	\$100.00	
7	SE-000013		Harris Andre	P-000...	Recreation	10/21/2025	12/30/2025	\$321.00	
8	SE-000012	Grant - CY 2025	Lara Eve Frazer	P-000...	Personal Support	10/21/2025	12/3/2025	\$2,323.00	
9	SE-000010	Grant - CY 2025	Cara Moran	P-000...	Therapy	10/5/2025	10/30/2025	\$300.00	
10	SE-000006	Grant - CY 2025	Harris Andre	P-000...	Transportation	10/9/2025	10/9/2025	\$100.00	
11	SE-000005		Harris Andre	P-000...	Support and Service Coordinat...	10/9/2025	10/9/2025	\$100.00	
12	SE-000004		Neymar Jr	P-000...	Transportation	10/6/2025	10/7/2025	\$250.00	
13	SE-000003	Dane - CY 2025	Cara Moran	P-000...	Therapy	6/18/2025	6/18/2025	\$1,000.00	
14	SE-000002	Brown - CY 2025	Camille S Snow	P-000...	Therapy	1/13/2025	6/24/2025	\$4,000.00	
15	SE-000001		Harris Andre	P-000...	Community Integration	8/5/2025	10/22/2025	\$2,000.00	
16	SE-000000	Dane - CY 2025	Cara Moran	P-000...	Transportation	10/8/2025	10/15/2025	\$100.00	

3.1.2 Creating a Service Expense – Selecting a Participant

- On the Service Expenses page, click the **New** button.

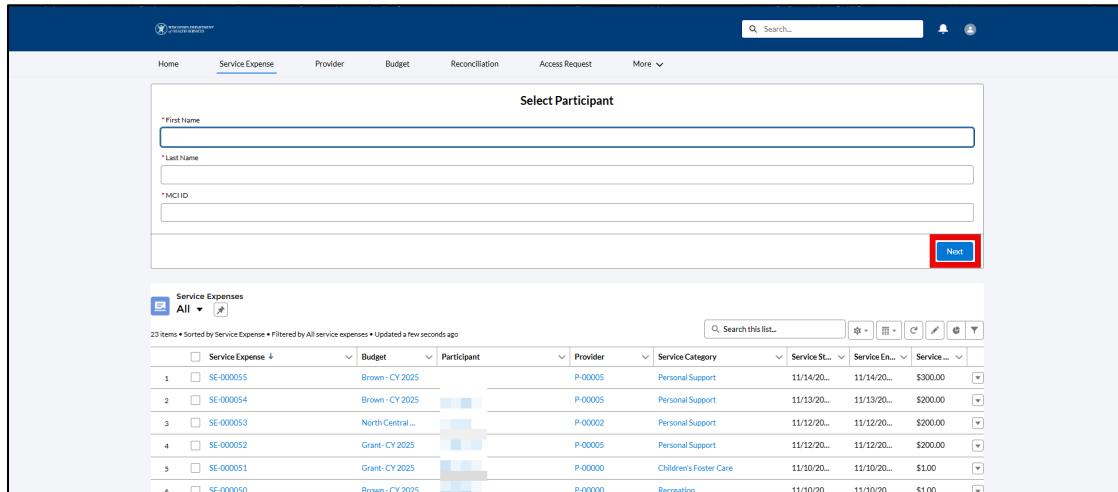
Service Expenses

All

16 items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

	Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Amount	
1	SE-000028			okok	10/4/2025	10/24/2025	\$300.00		
2	SE-000027			Recreation	10/20/2025	11/2/2025	\$987.00		
3	SE-000024	Grant - CY 2025		P-000...	Community Integration	10/23/2025	10/23/2025	\$123.00	
4	SE-000023			P-000...	Community Integration	10/24/2025	10/25/2025	\$1.00	
5	SE-000022	Grant - CY 2025		P-000...	Consumer and Family-Directed...	10/23/2025	10/23/2025	\$1.00	
6	SE-000017			P-000...	Offsets	10/22/2025	10/22/2025	\$100.00	
7	SE-000013			P-000...	Recreation	10/21/2025	12/30/2025	\$321.00	
8	SE-000012	Grant - CY 2025		P-000...	Personal Support	10/21/2025	12/3/2025	\$2,323.00	
9	SE-000010	Grant - CY 2025		P-000...	Therapy	10/5/2025	10/30/2025	\$300.00	
10	SE-000006	Grant - CY 2025		P-000...	Transportation	10/9/2025	10/9/2025	\$100.00	
11	SE-000005			P-000...	Support and Service Coordinat...	10/9/2025	10/9/2025	\$100.00	
12	SE-000004			P-000...	Transportation	10/6/2025	10/7/2025	\$250.00	
13	SE-000003	Dane - CY 2025		P-000...	Therapy	6/18/2025	6/18/2025	\$1,000.00	
14	SE-000002	Brown - CY 2025		P-000...	Therapy	1/13/2025	6/24/2025	\$4,000.00	
15	SE-000001			P-000...	Community Integration	8/5/2025	10/22/2025	\$2,000.00	
16	SE-000000	Dane - CY 2025		P-000...	Transportation	10/8/2025	10/15/2025	\$100.00	

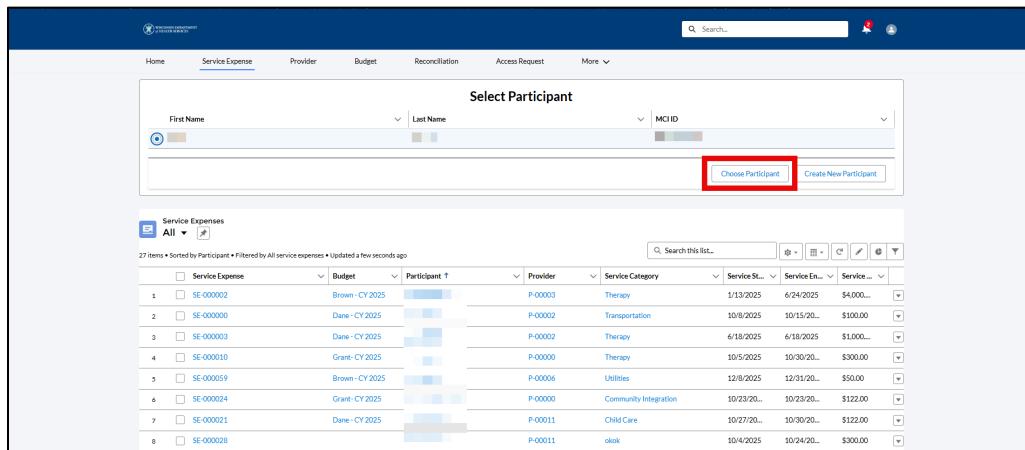
2. Enter the participant's first and last name and associated MCI ID, then click **Next**.



The screenshot shows a search interface for selecting a participant. It has three text input fields: 'First Name', 'Last Name', and 'MCI ID'. Below these is a 'Next' button, which is highlighted with a red box. Underneath the fields is a table of search results with columns for Service Expense, Budget, Participant, Provider, Service Category, Service Start Date, Service End Date, and Service Cost. The results list several entries, each with a checkbox and a unique ID.

Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Cost
SE-000055	Brown - CY 2025	P-00005	Personal Support	11/14/20...	11/14/20...	\$300.00	
SE-000054	Brown - CY 2025	P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00	
SE-000053	North Central ...	P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00	
SE-000052	Grant - CY 2025	P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00	
SE-000051	Grant - CY 2025	P-00000	Children's Foster Care	11/10/20...	11/10/20...	\$1.00	
SE-000050	Brown - CY 2025	P-00000	Respite	11/10/20...	11/10/20...	\$1.00	

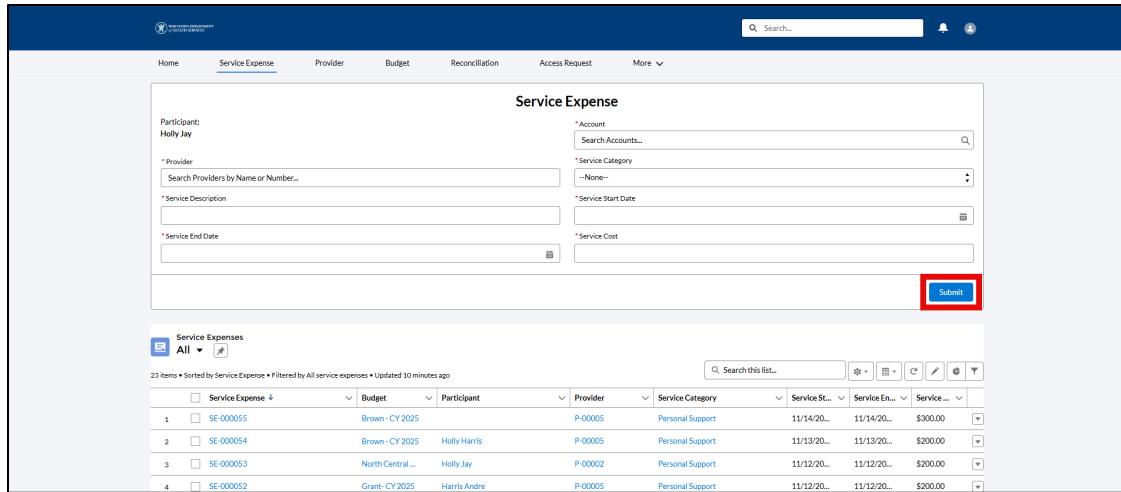
Once the participant is discovered in the system, select the radio button next to the participant's name and select **Choose Participant**.



The screenshot shows the same search interface as the previous one, but the 'Choose Participant' button is highlighted with a red box. The table of results is identical to the one above.

Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Cost
SE-000002	Brown - CY 2025	P-00003	Therapy	1/13/2025	6/24/2025	\$4,000.00	
SE-000000	Dane - CY 2025	P-00002	Transportation	10/8/2025	10/15/20...	\$100.00	
SE-000003	Dane - CY 2025	P-00002	Therapy	6/18/2025	6/18/2025	\$1,000.00	
SE-000010	Grant - CY 2025	P-00000	Therapy	10/5/2025	10/30/20...	\$300.00	
SE-000059	Brown - CY 2025	P-00006	Utilities	12/6/2025	12/31/20...	\$50.00	
SE-000024	Grant - CY 2025	P-00000	Community Integration	10/23/2025	10/23/20...	\$122.00	
SE-000021	Dane - CY 2025	P-00011	Child Care	10/27/2025	10/30/20...	\$122.00	
SE-000028		P-00011	okok	10/4/2025	10/24/20...	\$300.00	

Begin by selecting an existing provider. Then, choose the appropriate account (county) and service category from the dropdown menus. Input a service description, the start and end dates, and the service cost. **Note:** Service expense dates should be typed as 'mm/dd/yyyy' or selected using the calendar feature.



Service Expense

Participant: Holly Jay

Provider: Search Providers by Name or Number...

Service Description:

Service End Date:

Service Cost:

Submit

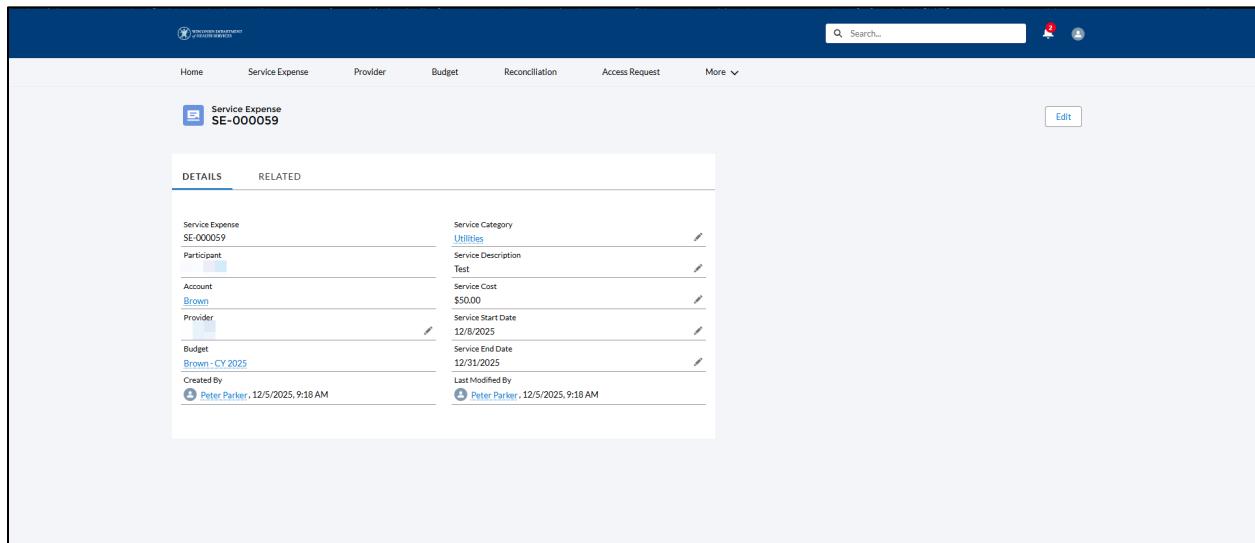
Service Expenses

All

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated 10 minutes ago

	Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Cost
1	SE-000055	Brown - CY 2025	P-00005	Personal Support	11/14/20...	11/14/20...	\$300.00	
2	SE-000054	Brown - CY 2025	Holly Harris	P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	SE-000053	North Central...	Holly Jay	P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	SE-000052	Grant - CY 2025	Harris Andre	P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00

Click **Submit** to save the record and submit to DHS. Service expenses are submitted against your county's annual budget. Click 'Home' to navigate back to the main page.



Service Expense
SE-000059

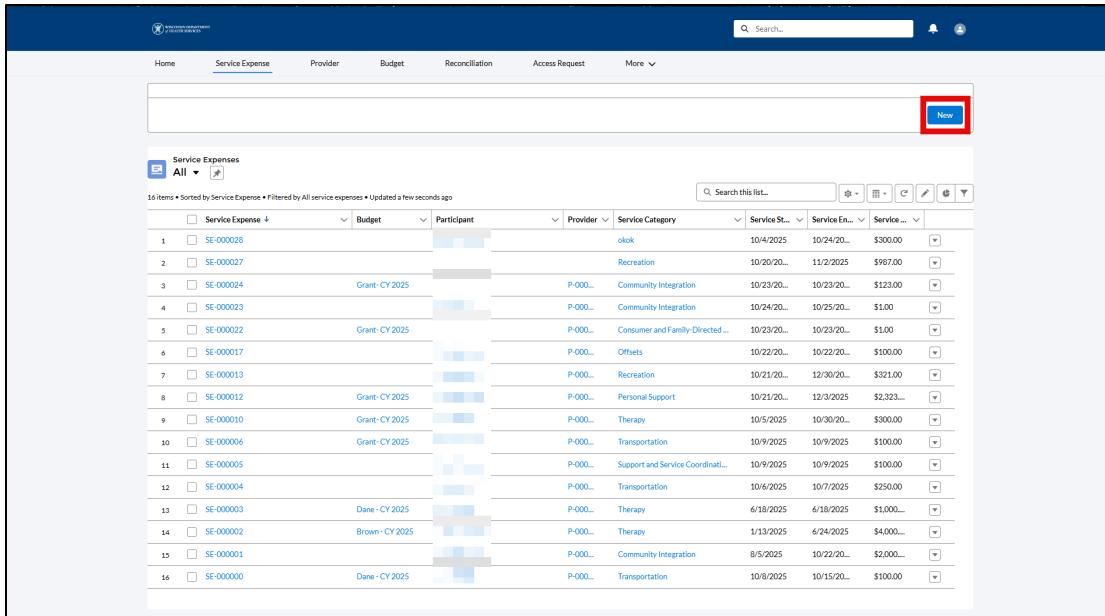
DETAILS

Service Expense SE-000059	Service Category Utilities
Participant	Service Description Test
Account Brown	Service Cost \$50.00
Provider	Service Start Date 12/8/2025
Budget Brown - CY 2025	Service End Date 12/31/2025
Created By Peter Parker , 12/5/2025, 9:18 AM	Last Modified By Peter Parker , 12/5/2025, 9:18 AM

RELATED

3.1.3 Creating a Service Expense – Create New Participant

1. On the Service Expenses page, click the **New** button.

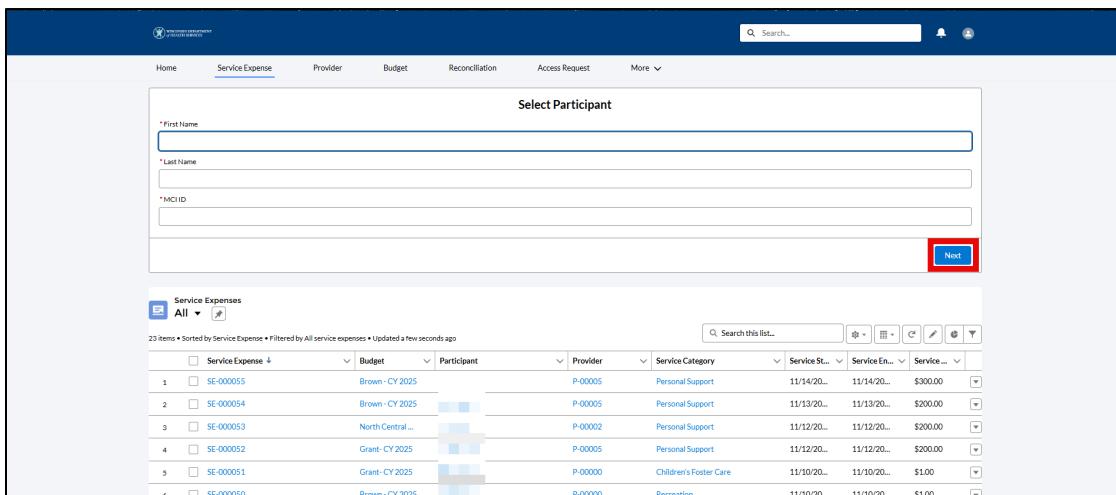


Service Expenses

16 Items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

	Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Amount
1	□ SE-000028			okok	Recreation	10/4/2025	10/24/2025	\$300.00
2	□ SE-000027					10/20/2025	11/2/2025	\$967.00
3	□ SE-000024	Grant - CY 2025		P-000...	Community Integration	10/23/2025	10/23/2025	\$123.00
4	□ SE-000023			P-000...	Community Integration	10/24/2025	10/25/2025	\$1.00
5	□ SE-000022	Grant - CY 2025		P-000...	Consumer and Family Directed...	10/23/2025	10/23/2025	\$1.00
6	□ SE-000017			P-000...	Offsets	10/22/2025	10/22/2025	\$100.00
7	□ SE-000013			P-000...	Recreation	10/21/2025	12/30/2025	\$921.00
8	□ SE-000012	Grant - CY 2025		P-000...	Personal Support	10/21/2025	12/3/2025	\$2,323.00
9	□ SE-000010	Grant - CY 2025		P-000...	Therapy	10/5/2025	10/30/2025	\$300.00
10	□ SE-000006	Grant - CY 2025		P-000...	Transportation	10/9/2025	10/9/2025	\$100.00
11	□ SE-000005			P-000...	Support and Service Coordinat...	10/9/2025	10/9/2025	\$100.00
12	□ SE-000004			P-000...	Transportation	10/6/2025	10/7/2025	\$250.00
13	□ SE-000003	Dane - CY 2025		P-000...	Therapy	6/18/2025	6/18/2025	\$1,000.00
14	□ SE-000002	Brown - CY 2025		P-000...	Therapy	1/13/2025	6/24/2025	\$4,000.00
15	□ SE-000001			P-000...	Community Integration	8/5/2025	10/22/2025	\$2,000.00
16	□ SE-000000	Dane - CY 2025		P-000...	Transportation	10/8/2025	10/15/2025	\$100.00

2. Enter the participant's first and last name and associated MCI ID. If the individual is a new participant, continue to click **Next**.



Select Participant

*First Name:

*Last Name:

*MCI ID:

Next

Service Expenses

23 Items • Sorted by Service Expense • Filtered by All service expenses • Updated a few seconds ago

	Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Amount
1	□ SE-000055	Brown - CY 2025		P-00005	Personal Support	11/14/2025	11/14/2025	\$300.00
2	□ SE-000054	Brown - CY 2025		P-00005	Personal Support	11/13/2025	11/13/2025	\$200.00
3	□ SE-000053	North Central ...		P-00002	Personal Support	11/12/2025	11/12/2025	\$200.00
4	□ SE-000052	Grant - CY 2025		P-00005	Personal Support	11/12/2025	11/12/2025	\$200.00
5	□ SE-000051	Grant - CY 2025		P-00000	Children's Foster Care	11/10/2025	11/10/2025	\$1.00
6	□ SE-000050	Brown - CY 2025		P-00000	Recreation	11/10/2025	11/10/2025	\$1.00

3. The system will acknowledge there are no records for the newly typed in data and prompt the user to create the participant record. Click **Create New Participant**.

No results found.

Choose Participant Create New Participant

Service Expenses
All Filter

23 items • Sorted by Service Expense • Filtered by All service expenses • Updated 2 minutes ago

	Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Cost
1	SE-000055	Brown - CY 2025	Brown	P-00005	Personal Support	11/14/20...	11/14/20...	\$300.00
2	SE-000054	Brown - CY 2025	Holly Harris	P-00005	Personal Support	11/13/20...	11/13/20...	\$200.00
3	SE-000053	North Central ...	Holly Jay	P-00002	Personal Support	11/12/20...	11/12/20...	\$200.00
4	SE-000052	Grant - CY 2025	Harris Andre	P-00005	Personal Support	11/12/20...	11/12/20...	\$200.00
5	SE-000051	Grant - CY 2025	Neymar Jr	P-00000	Children's Foster Care	11/10/20...	11/10/20...	\$1.00
6	SE-000050	Brown - CY 2025	Neymar Jr	P-00000	Recreation	11/10/20...	11/10/20...	\$1.00
7	SE-000049	Brown - CY 2025	Neymar Jr	P-00000	Respite	11/10/20...	11/10/20...	\$1.00
8	SE-000028		Emma Johnson	okok		10/4/2025	10/24/20...	\$300.00
9	SE-000027				Recreation	10/20/20...	11/2/2025	\$97.00

4. Fill out the participant fields and click **Next**.

MCID * Complete this field.

First Name

Middle Name

Last Name

SSN

Suffix

Gender --None--

Hispanic/Latino --None--

Birthdate

Race Asian

White

Black or African American

Native Hawaiian or Pacific Islander

American Indian or Alaska Native

Level of Care --None--

Living Arrangement --None--

CLTS Status --None--

Medicaid enrolled? --None--

Next

The system will return the user back to the Service Expense edit page with the new participant highlighted in the left-hand corner.

Participant: Billy West

Account Search Accounts...

Service Category --None--

Service Start Date

Service End Date

Service Cost

Submit

Service Expenses
All Filter

27 items • Sorted by Participant • Filtered by All service expenses • Updated 2 minutes ago

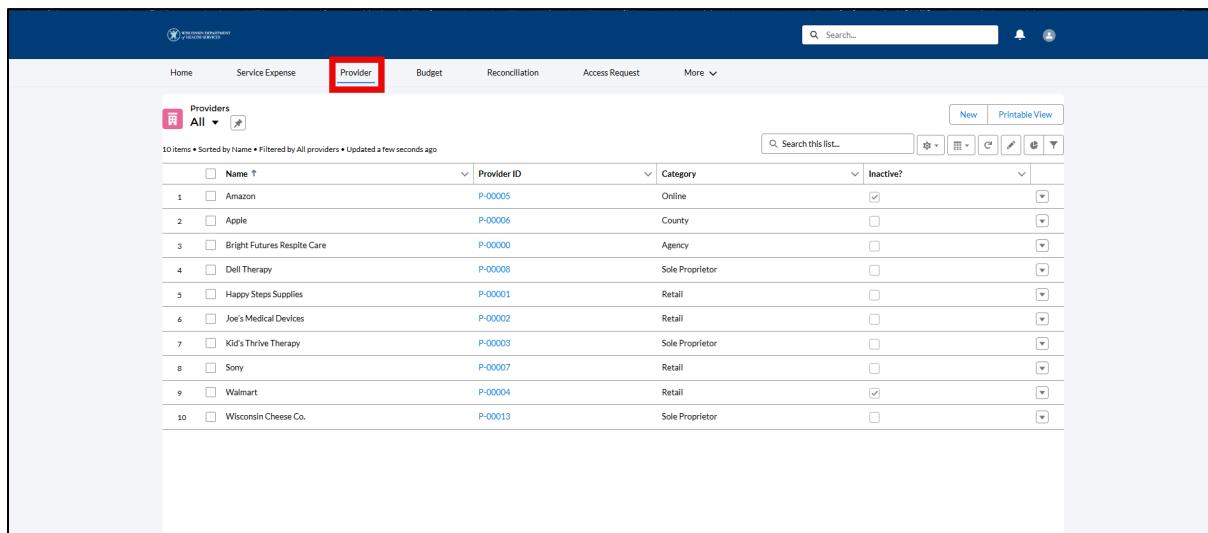
	Service Expense	Budget	Participant	Provider	Service Category	Service Start Date	Service End Date	Service Cost
1	SE-000002	Brown - CY 2025	Caroline S Snow	P-00003	Therapy	1/15/2025	6/24/2025	\$4,000...
2	SE-000000	Dane - CY 2025	Cara Moran	P-00002	Transportation	10/6/2025	10/15/20...	\$100.00
3	SE-000003	Dane - CY 2025	Cara Moran	P-00002	Therapy	6/18/2025	6/18/2025	\$1,000...
4	SE-000010	Grant - CY 2025	Cara Moran	P-00000	Therapy	10/5/2025	10/30/20...	\$300.00

5. Continue with creating the Service Expense record by choosing the appropriate account (county) and service category from the dropdown menus. Input a service description, the start and end dates, and the service cost. **Note:** Service expense dates should be typed as 'mm/dd/yyyy' or selected using the calendar feature.

6. Click **Submit** to save the record and submit it to DHS. Click 'Home' to navigate back to the main page.

3.2 Provider Page

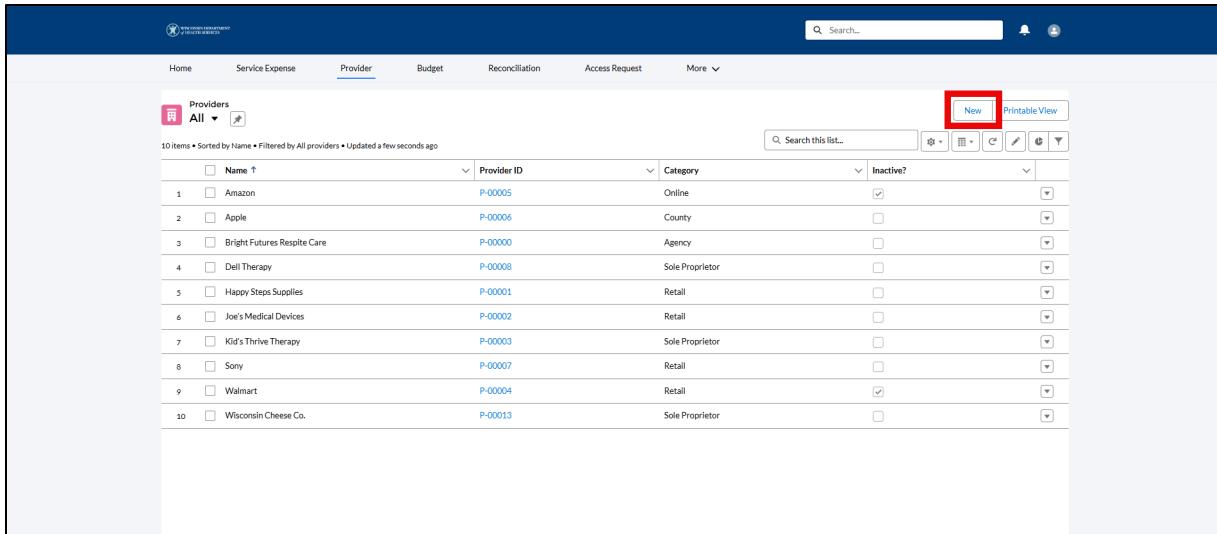
The Provider page displays all service providers entered by county users. You can view existing providers and create new provider records as needed.



	Name	Provider ID	Category	Inactive?
1	Amazon	P-00005	Online	<input checked="" type="checkbox"/>
2	Apple	P-00006	County	<input type="checkbox"/>
3	Bright Futures Respite Care	P-00000	Agency	<input type="checkbox"/>
4	Del Therapy	P-00008	Sole Proprietor	<input type="checkbox"/>
5	Happy Steps Supplies	P-00001	Retail	<input type="checkbox"/>
6	Joe's Medical Devices	P-00002	Retail	<input type="checkbox"/>
7	Kid's Thrive Therapy	P-00003	Sole Proprietor	<input type="checkbox"/>
8	Sony	P-00007	Retail	<input type="checkbox"/>
9	Walmart	P-00004	Retail	<input checked="" type="checkbox"/>
10	Wisconsin Cheese Co.	P-00013	Sole Proprietor	<input type="checkbox"/>

3.2.1 Creating a Provider Record

To create a new provider, click the **New** button on the Provider page.



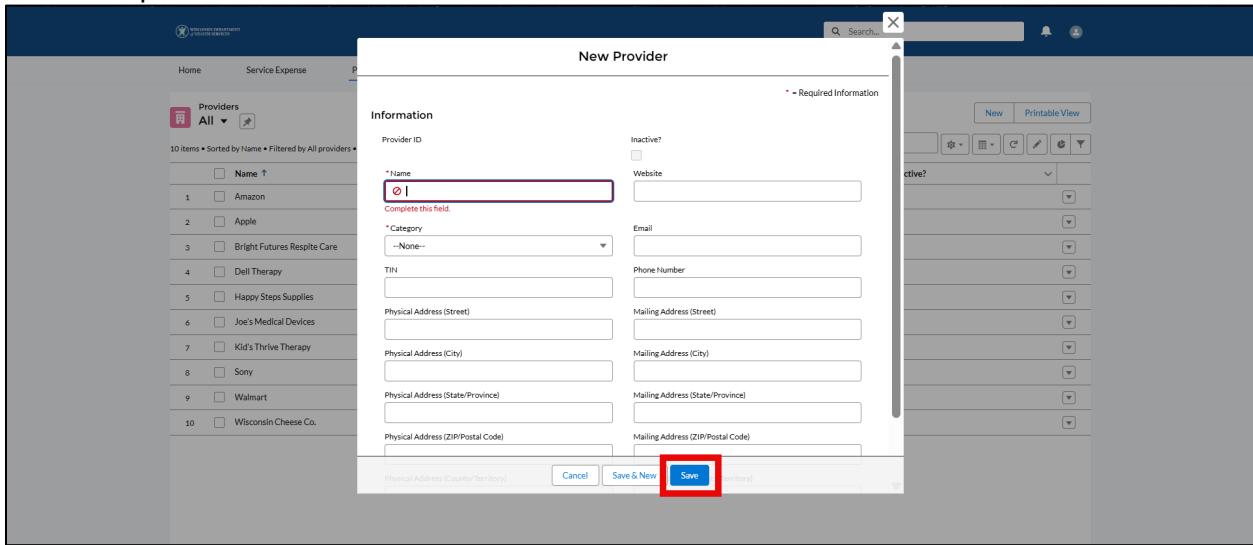
Providers

All

10 items • Sorted by Name • Filtered by All providers • Updated a few seconds ago

	Name	Provider ID	Category	Inactive?
1	Amazon	P-00005	Online	<input checked="" type="checkbox"/>
2	Apple	P-00006	County	<input type="checkbox"/>
3	Bright Futures Respite Care	P-00000	Agency	<input type="checkbox"/>
4	Dell Therapy	P-00008	Sole Proprietor	<input type="checkbox"/>
5	Happy Steps Supplies	P-00001	Retail	<input type="checkbox"/>
6	Joe's Medical Devices	P-00002	Retail	<input type="checkbox"/>
7	Kid's Thrive Therapy	P-00003	Sole Proprietor	<input type="checkbox"/>
8	Sony	P-00007	Retail	<input type="checkbox"/>
9	Walmart	P-00004	Retail	<input checked="" type="checkbox"/>
10	Wisconsin Cheese Co.	P-00013	Sole Proprietor	<input type="checkbox"/>

Fill in all the required information about the provider and click **Save** to save the record. Once the provider has been created, it will be available for selection when creating service expenses.



New Provider

Information

Provider ID: P-00013

Inactive?

*Name:

Complete this field.

*Category:

Website:

Email:

TIN:

Phone Number:

Physical Address (Street):

Mailing Address (Street):

Physical Address (City):

Mailing Address (City):

Physical Address (State/Province):

Mailing Address (State/Province):

Physical Address (ZIP/Postal Code):

Mailing Address (ZIP/Postal Code):

Physical Address County/Parish:

Save

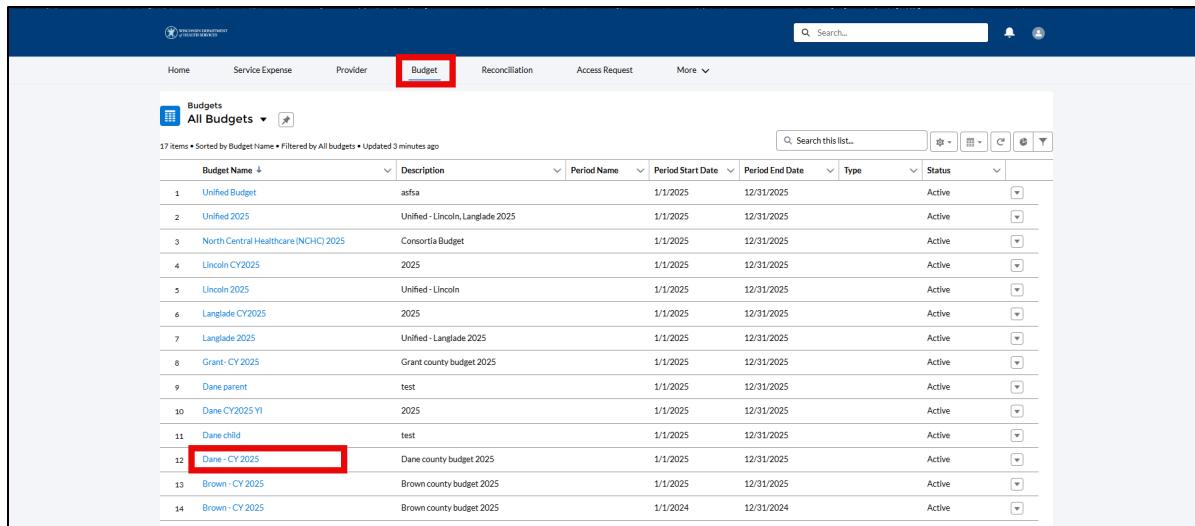
Note: A provider can also be created during the Service Expense process.

3.3 Budget Page

The Budget page displays each county's annual budget allocation. Budgets are released once a year by DHS administrators and determine how much funding is available for program expenses.

County users can view their current budget, see how much has been spent, and track remaining funds. All service expenses are created against the annual budget.

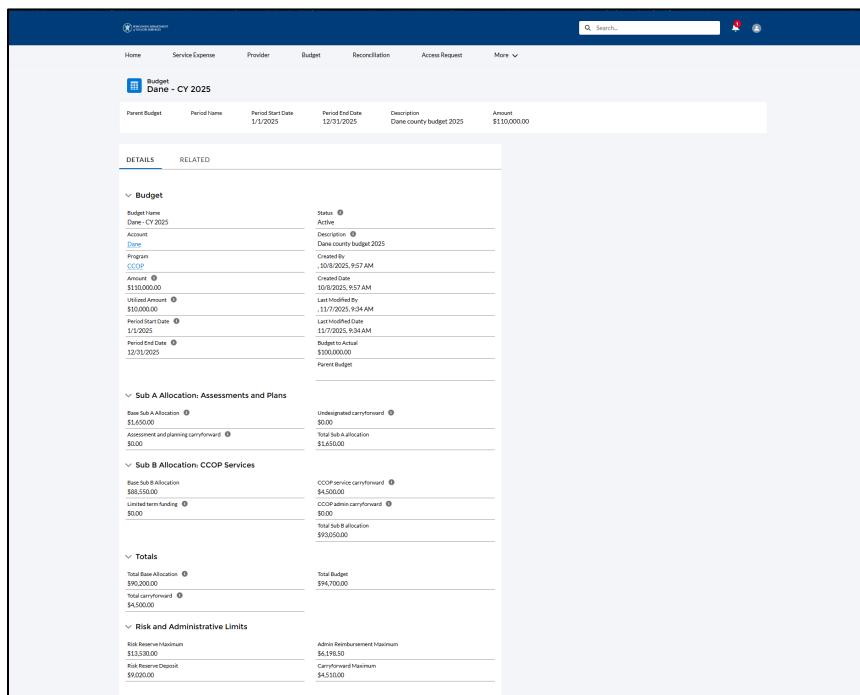
To view budget records, choose any record link under the **Budget Name** column.



The screenshot shows a table of budget records with the following data:

Budget Name	Description	Period Name	Period Start Date	Period End Date	Type	Status
Unified Budget	asfsa		1/1/2025	12/31/2025		Active
Unified 2025	Unified - Lincoln, Langlade 2025		1/1/2025	12/31/2025		Active
North Central Healthcare (NCHO) 2025	Consortia Budget		1/1/2025	12/31/2025		Active
Lincoln CY2025	2025		1/1/2025	12/31/2025		Active
Lincoln 2025	Unified - Lincoln		1/1/2025	12/31/2025		Active
Langlade CY2025	2025		1/1/2025	12/31/2025		Active
Langlade 2025	Unified - Langlade 2025		1/1/2025	12/31/2025		Active
Grant - CY2025	Grant county budget 2025		1/1/2025	12/31/2025		Active
Dane parent	test		1/1/2025	12/31/2025		Active
Dane CY2025 Y1	2025		1/1/2025	12/31/2025		Active
Dane child	test		1/1/2025	12/31/2025		Active
Dane - CY 2025	Dane county budget 2025		1/1/2025	12/31/2025		Active
Brown - CY 2025	Brown county budget 2025		1/1/2025	12/31/2025		Active
Brown - CY 2025	Brown county budget 2025		1/1/2024	12/31/2024		Active

Here's an example of what a budget record looks like.



The detailed budget record for 'Dane - CY 2025' includes the following information:

Parent Budget	Period Name	Period Start Date	Period End Date	Description	Amount
		1/1/2025	12/31/2025	Dane county budget 2025	\$110,000.00

DETAILS **RELATED**

Budget

Budget Name	Status
Dane - CY 2025	Active
Account	Description
Dane	Dane county budget 2025
Program	Created Date
CCOP	10/8/2025, 9:57 AM
Amount	Created Date
\$110,000.00	10/8/2025, 9:57 AM
Unallocated Amount	Last Modified Date
\$100,000.00	11/7/2025, 9:34 AM
Period Start Date	Last Modified Date
1/1/2025	11/7/2025, 9:34 AM
Period End Date	Budget to Actual
12/31/2025	\$100,000.00
	Parent Budget

Sub Allocation: Assessments and Plans

Base Sub Allocation	Unallocated carryforward
\$1,400.00	\$0.00
Assessment and planning carryforward	Total Sub Allocation
\$0.00	\$1,650.00

Sub Allocation: CCOP Services

Base Sub Allocation	CCOP service carryforward
\$88,550.00	\$4,500.00
Limited term funding	CCOP admin carryforward
\$0.00	\$0.00
	Total Sub Allocation
	\$93,050.00

Totals

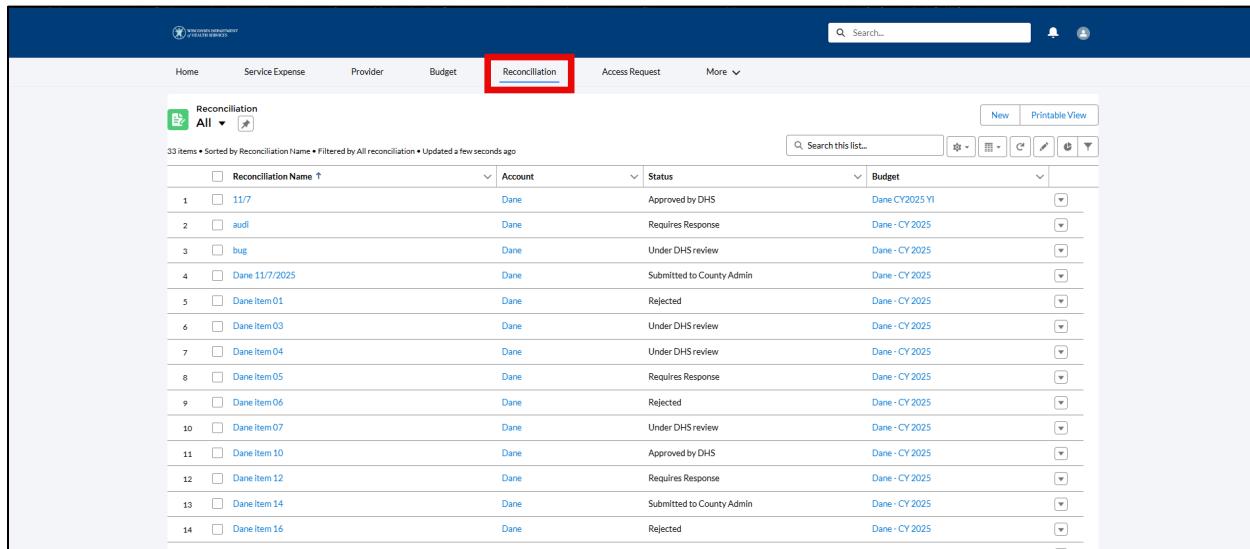
Total Base Allocation	Total Budget
\$90,200.00	\$94,700.00
Total carryforward	
\$4,500.00	

Risk and Administrative Limits

Risk Reserve Maximum	Admin Reimbursement Maximum
\$115,500.00	\$6,191.50
Risk Reserve Deposit	Carryforward Maximum
\$9,000.00	\$4,500.00

3.4 Reconciliation Page

The Reconciliation page is where the annual reconciliation process takes place. Below is the list view of existing reconciliation records under the Reconciliation tab.



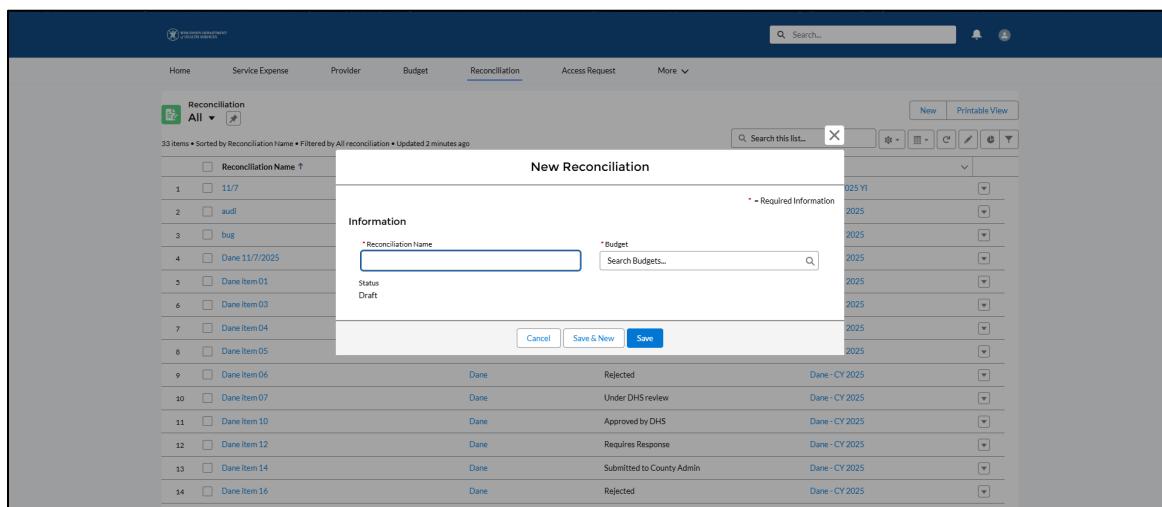
	Reconciliation Name	Account	Status	Budget
1	11/7	Dane	Approved by DHS	Dane CY2025 YI
2	audi	Dane	Requires Response	Dane - CY 2025
3	bug	Dane	Under DHS review	Dane - CY 2025
4	Dane 11/7/2025	Dane	Submitted to County Admin	Dane - CY 2025
5	Dane Item 01	Dane	Rejected	Dane - CY 2025
6	Dane item 03	Dane	Under DHS review	Dane - CY 2025
7	Dane Item 04	Dane	Under DHS review	Dane - CY 2025
8	Dane Item 05	Dane	Requires Response	Dane - CY 2025
9	Dane Item 06	Dane	Rejected	Dane - CY 2025
10	Dane Item 07	Dane	Under DHS review	Dane - CY 2025
11	Dane Item 10	Dane	Approved by DHS	Dane - CY 2025
12	Dane Item 12	Dane	Requires Response	Dane - CY 2025
13	Dane Item 14	Dane	Submitted to County Admin	Dane - CY 2025
14	Dane Item 16	Dane	Rejected	Dane - CY 2025

3.4.1 Working with Reconciliation Forms

County users can prepare reconciliation forms but **cannot** submit them to DHS. Only county admins can send reconciliation forms to DHS for review.

To work on a reconciliation form:

1. Navigate to the Reconciliation page
2. Name the reconciliation and add the relevant budget year by searching in the Budget field



	Reconciliation Name	Account	Status	Budget
1	11/7	Dane	Rejected	Dane - CY 2025
2	audi	Dane	Under DHS review	Dane - CY 2025
3	bug	Dane	Approved by DHS	Dane - CY 2025
4	Dane 11/7/2025	Dane	Requires Response	Dane - CY 2025
5	Dane Item 01	Dane	Submitted to County Admin	Dane - CY 2025
6	Dane item 03	Dane	Rejected	Dane - CY 2025
7	Dane Item 04	Dane	Under DHS review	Dane - CY 2025
8	Dane Item 05	Dane	Requires Response	Dane - CY 2025
9	Dane Item 06	Dane	Rejected	Dane - CY 2025
10	Dane Item 07	Dane	Under DHS review	Dane - CY 2025
11	Dane Item 10	Dane	Approved by DHS	Dane - CY 2025
12	Dane Item 12	Dane	Requires Response	Dane - CY 2025
13	Dane Item 14	Dane	Submitted to County Admin	Dane - CY 2025
14	Dane Item 16	Dane	Rejected	Dane - CY 2025

Important: The system controls when users can access specific budget records for reconciliation.

- **Administrative Control** – DHS admins control when users can access certain budget records on the back end.
- **Budget-Year Alignment** – Budget records are tied to the calendar year. When creating a reconciliation record, the budget selection field will only display budgets that are currently available for reconciliation.
- **Reconciliation Timing** – Reconciliation takes place in the first quarter of the year (March-April timeframe) for the previous calendar year.

Example: If you're reconciling for the 2024 calendar year, this would typically occur in March or April of 2025. The system prevents scenarios where reconciliation would happen at inappropriate times (such as reconciling for 2024 in September 2024).

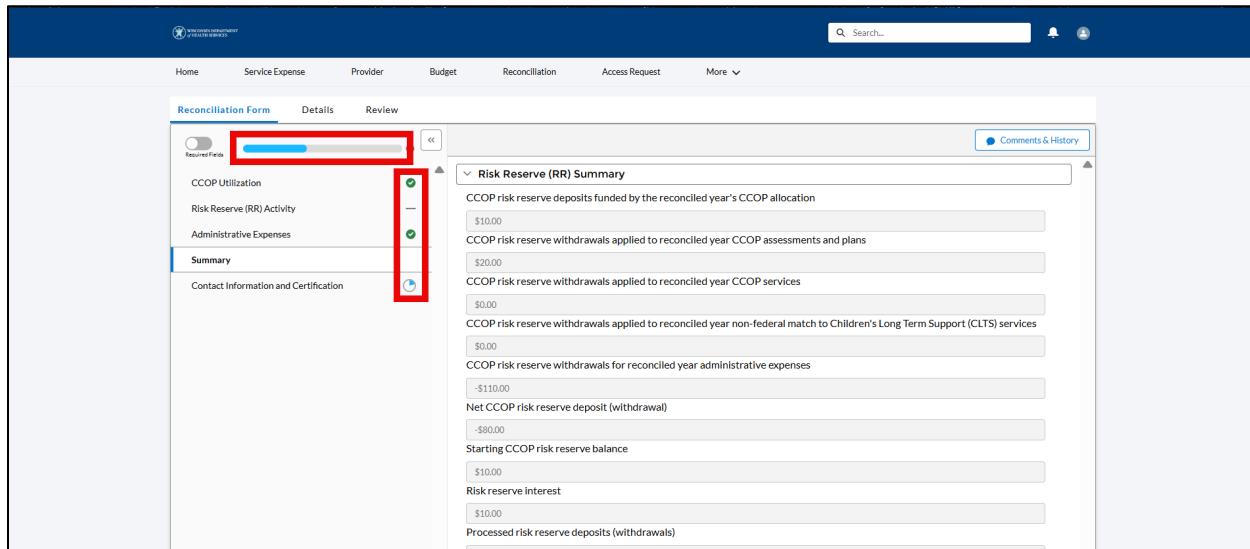
3.4.2 Reconciliation Form Tab

Fill in all required information comparing budgeted amounts to actual expenses in the Reconciliation Form Tab. Enter values in required fields or select "Accept Default Value" to complete the field.

The screenshot shows the 'Reconciliation Form' tab selected in the top navigation bar. The 'CCOP Utilization' section is expanded, displaying fields for 'Reconciled Year' and 'CCOP Assessments and Plans'. A note in the 'Assessment and Plan Expenses' field states: 'A default value has been assigned to this field.' with a 'Accept Default Value' button. The 'CCOP Services' section is also expanded, with a similar note and button for the 'Straight CCOP Service Expenses' field. Other sections like 'Risk Reserve (RR) Activity', 'Administrative Expenses', 'Summary', and 'Contact Information and Certification' are visible but not expanded.

Progress Tracking

The Reconciliation Form tab includes progress indicators that show completion status for the individual sections and the overall form.



Reconciliation Form Details Review

Required Fields

CCOP Utilization

Risk Reserve (RR) Activity

Administrative Expenses

Summary

Contact Information and Certification

Risk Reserve (RR) Summary

CCOP risk reserve deposits funded by the reconciled year's CCOP allocation

\$10.00

CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans

\$20.00

CCOP risk reserve withdrawals applied to reconciled year CCOP services

\$0.00

CCOP risk reserve withdrawals applied to reconciled year non-federal match to Children's Long Term Support (CLTS) services

\$0.00

CCOP risk reserve withdrawals for reconciled year administrative expenses

-\$10.00

Net CCOP risk reserve deposit (withdrawal)

\$0.00

Starting CCOP risk reserve balance

\$10.00

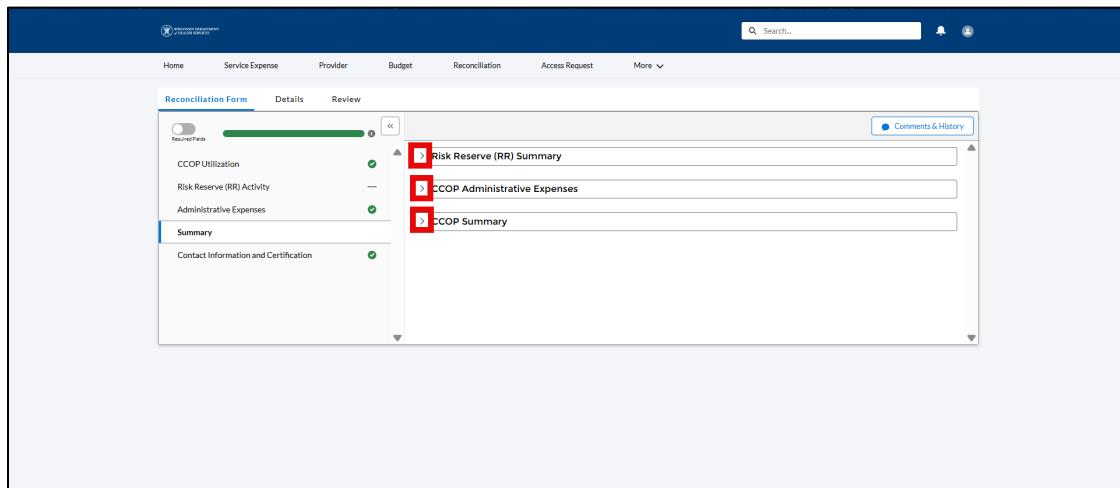
Risk reserve interest

\$10.00

Processed risk reserve deposits (withdrawals)

Reconciliation Form Features

- Expandable Sections** – The lefthand panel can expand or hide the form section menu. Individual sections can be expanded or collapsed, allowing you to focus on the section you're currently working on.



Reconciliation Form Details Review

Required Fields

CCOP Utilization

Risk Reserve (RR) Activity

Administrative Expenses

Summary

Contact Information and Certification

Risk Reserve (RR) Summary

CCOP Administrative Expenses

CCOP Summary

- **Save as Draft** – Save your work in progress as a draft. You must save each section as a draft before moving to the next section. If you try to navigate away without saving, the system will notify you of unsaved data and require you to save before proceeding.

Calculated Fields

Some fields in the reconciliation form are automatically calculated and appear grayed out. Calculated fields update in two ways:

1. **Immediate calculation:** Some fields update automatically as soon as you enter a value in a related field.

Examples:

- Starting CCOP risk reserve balance
- Reported unreimbursed and unrequested from CCOP administrative costs

2. **Calculation on save:** Other fields update only after "Save as Draft" is selected.

Examples:

- Pending prior year CCOP risk reserve

- Ending CCOP risk reserve balance

The screenshot shows a web-based application for a 'Reconciliation Form'. The top navigation bar includes 'Home', 'Service Expense', 'Provider', 'Budget', 'Reconciliation', 'Access Request', and 'More'. The main content area is titled 'Reconciliation Form' and has tabs for 'Details' and 'Review'. On the left, a sidebar lists sections: 'CCOP Utilization' (green checkmark), 'Risk Reserve (RR) Activity' (grey minus sign), 'Administrative Expenses' (green checkmark), and 'Summary' (blue bar). The 'Summary' section is expanded, showing 'Contact Information and Certification' (blue bar). The right side of the screen displays a 'Risk Reserve (RR) Summary' table with the following data:

Risk Reserve (RR) Summary	
CCOP risk reserve deposits funded by the reconciled year's CCOP allocation	\$10.00
CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans	\$20.00
CCOP risk reserve withdrawals applied to reconciled year CCOP services	\$0.00
CCOP risk reserve withdrawals applied to reconciled year non-federal match to Children's Long Term Support (CLTS) services	\$0.00
CCOP risk reserve withdrawals for reconciled year administrative expenses	\$-110.00
Net CCOP risk reserve deposit (withdrawal)	\$0.00
Starting CCOP risk reserve balance	\$10.00
Risk reserve interest	\$10.00
Processed risk reserve deposits (withdrawals)	

Conditional Questions

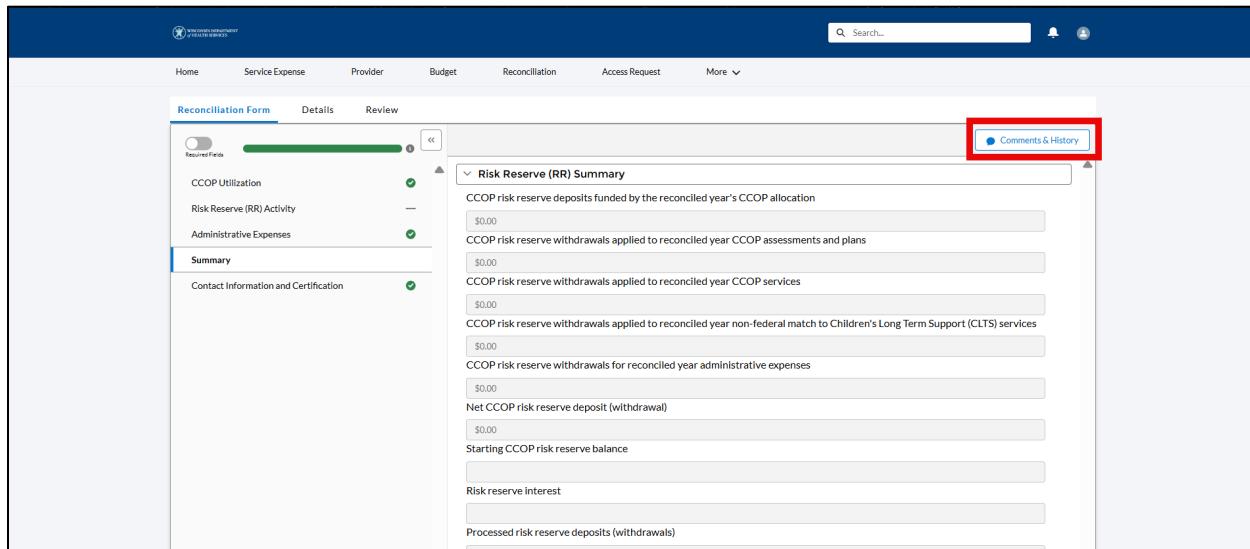
Certain fields may appear based on your answers to conditional questions, such as whether your county maintains a risk reserve.

In the last section, Contact Information and Certification, click **Submit** to save and submit your work.

The screenshot shows the 'Contact Information and Certification' section of the form. It includes fields for primary and secondary fiscal contacts, and a certification section. The 'Contact Information and Certification' section is highlighted with a red box. The 'Submit' button at the bottom right is also highlighted with a red box.

Once a county user submits a form, the county admin will be notified and review the form. County admins can approve or reject. When a county admin approves and submits the reconciliation form, DHS will review and either approve or reject it. County admins and DHS may add comments requesting clarification once a form is rejected.

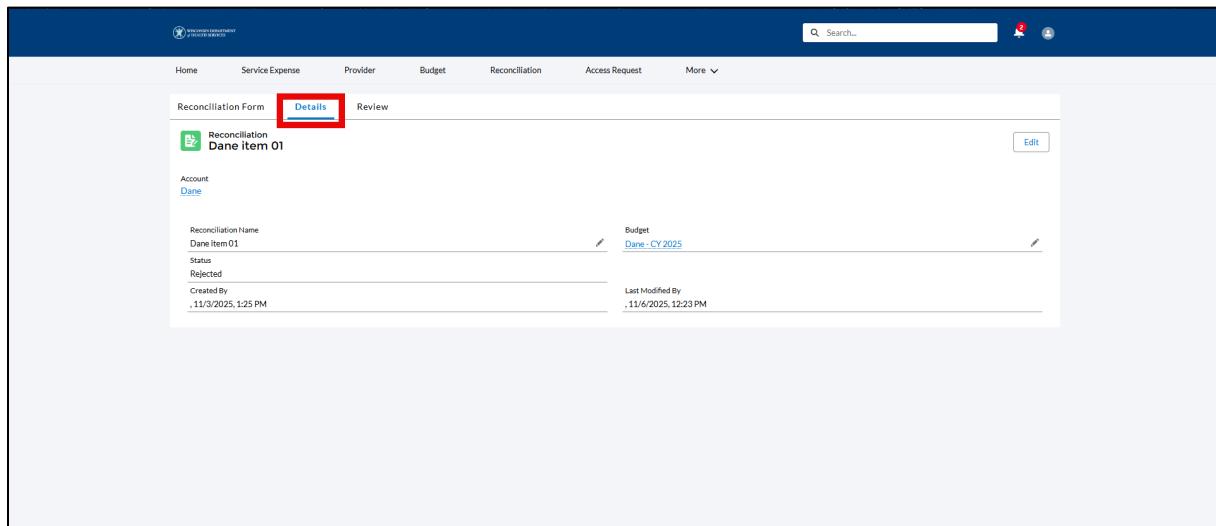
Comments can be found using the Comment & History button inside of the reconciliation form. See section 3.4.3 County Admin Review Process.



The screenshot shows the 'Reconciliation Form' page. At the top, there are tabs for 'Reconciliation Form', 'Details', and 'Review'. The 'Reconciliation Form' tab is active. On the left, there is a sidebar with sections like 'CCOP Utilization', 'Risk Reserve (RR) Activity', 'Administrative Expenses', and 'Summary'. The 'Summary' section is expanded. On the right, there is a large panel titled 'Risk Reserve (RR) Summary' which lists various financial details. In the top right corner of this panel, there is a blue button labeled 'Comments & History' with a red box drawn around it.

Details Tab

The Details tab can be checked for additional information related to the reconciliation form including the record status; whether it has been **Approved by DHS, Rejected, Submitted to the County Admin, Under DHS review, or Requires Response**. When the record is saved or submitted, it will be found under the Reconciliation Page list view.



The screenshot shows the 'Reconciliation Form' page with the 'Details' tab selected. At the top, there are tabs for 'Reconciliation Form', 'Details', and 'Review'. The 'Details' tab is active. In the center, there is a list of reconciliation items. The first item is 'Reconciliation Dane item 01'. Below the list, there are two columns of information: 'Reconciliation Name' (Dane item 01) and 'Budget' (Dane - CY 2025). Under 'Reconciliation Name', there are fields for 'Status' (Rejected) and 'Created By' (,11/3/2025, 1:25 PM). Under 'Budget', there is a field for 'Last Modified By' (,11/6/2025, 12:23 PM). A red box highlights the 'Rejected' status in the 'Status' field.

3.4.3 County Admin Review Process

After a county user submits a reconciliation form, it enters review with the county admin.

Notifications

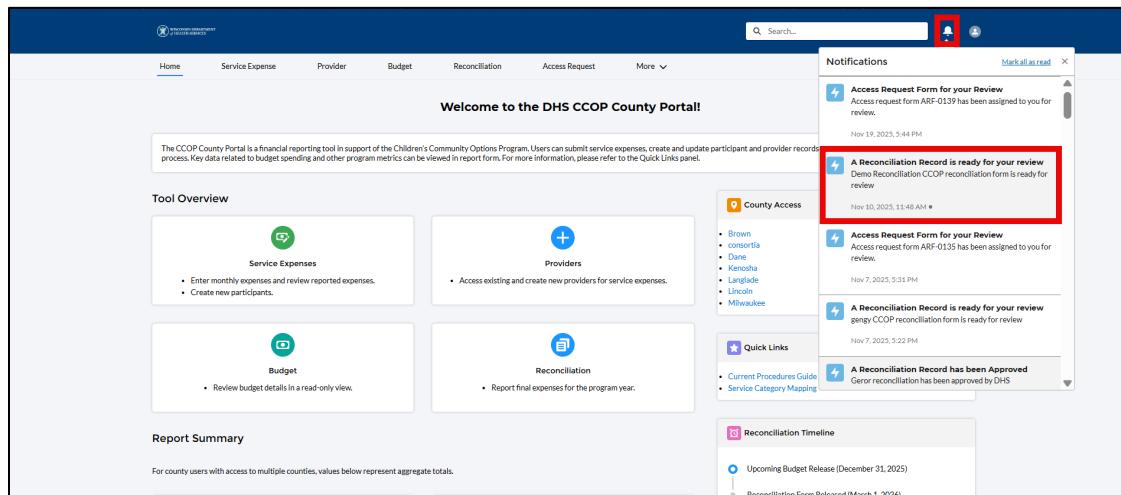
- The county admin receives both an email notification and a portal notification indicating that a reconciliation form is ready for review. Here is an example of the email template:

From: CCOP DHS <heartccop@gmail.com>
Sent: Thursday, December 4, 2025 4:04 PM
To: [REDACTED]
Subject: [EXT] Sandbox: Wisconsin DHS CCOP - Access Request Form Submission

Hello,
This is a notification confirming that [ARF-0144](#) access request form has been submitted in [HEART](#).

Thank you,
Wisconsin DHS CCOP

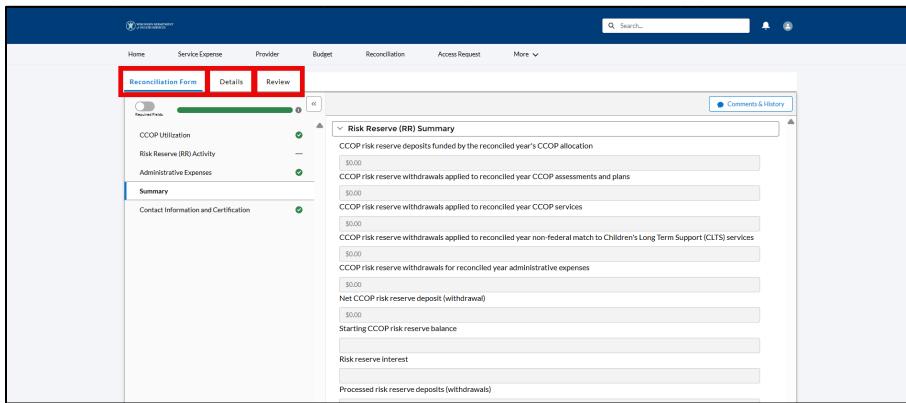
- The portal notification appears in the system (bell icon) and includes details about the submitted record
- Clicking the notification directs the admin to the reconciliation record



Alternatively, a county admin can look for the reconciliation record under "Submitted to County Admin" status in the Reconciliation list view to begin reviewing it.

Review Steps

1. County admins review all tabs of the submitted form
2. They look through and verify what the county user has input
3. On the Review tab, they provide the review decision



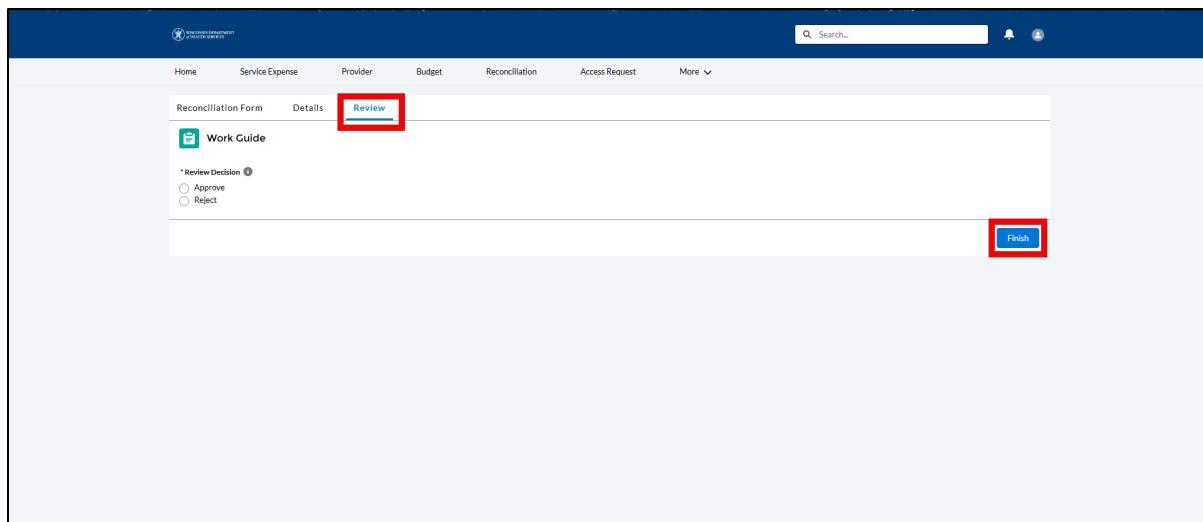
The screenshot shows the 'Review' tab of the 'Reconciliation Form' in the software. The 'Risk Reserve (RR) Summary' section is expanded, displaying various financial details:

- CCOP risk reserve deposits funded by the reconciled year's CCOP allocation: \$0.00
- CCOP risk reserve withdrawals applied to reconciled year CCOP assessments and plans: \$0.00
- CCOP risk reserve withdrawals applied to reconciled year CCOP services: \$0.00
- CCOP risk reserve withdrawals applied to reconciled year non-federal match to Children's Long Term Support (CLTS) services: \$0.00
- CCOP risk reserve withdrawals for reconciled year administrative expenses: \$0.00
- Net CCOP risk reserve deposit (withdrawal): \$0.00
- Starting CCOP risk reserve balance: \$0.00
- Risk reserve interest: \$0.00
- Processed risk reserve deposits (withdrawals): \$0.00

Review Decisions

County admins have two options:

- **Approve** - Sends the form to the DHS admin approval queue. Status changes from "Submitted" to "Under DHS Review" in the Reconciliation record.
- **Reject** - Returns the form to the county user for corrections. Status changes from "Submitted" to "Rejected" in the Reconciliation record. Rejection is appropriate when:
 - There is new content that needs to be updated
 - There is inaccurate information throughout the form



The screenshot shows the 'Review' tab of the 'Reconciliation Form' in the software. The 'Review Decision' section contains the following:

- * Review Decision
- Approve
- Reject

A red box highlights the 'Review' tab in the top navigation bar. A red box also highlights the 'Finish' button in the bottom right corner of the review section.

Select **Finish** to confirm the status of the form. The county user that submitted the reconciliation form will get an email notification that lets them know if their form has been approved or rejected. Here is an example of the email template:

From: CCOP DHS <heartccop@gmail.com>
Sent: Thursday, December 4, 2025 4:04 PM
To: 
Subject: [EXT] Sandbox: Wisconsin DHS CCOP - Reconciliation Form CY1340 Available

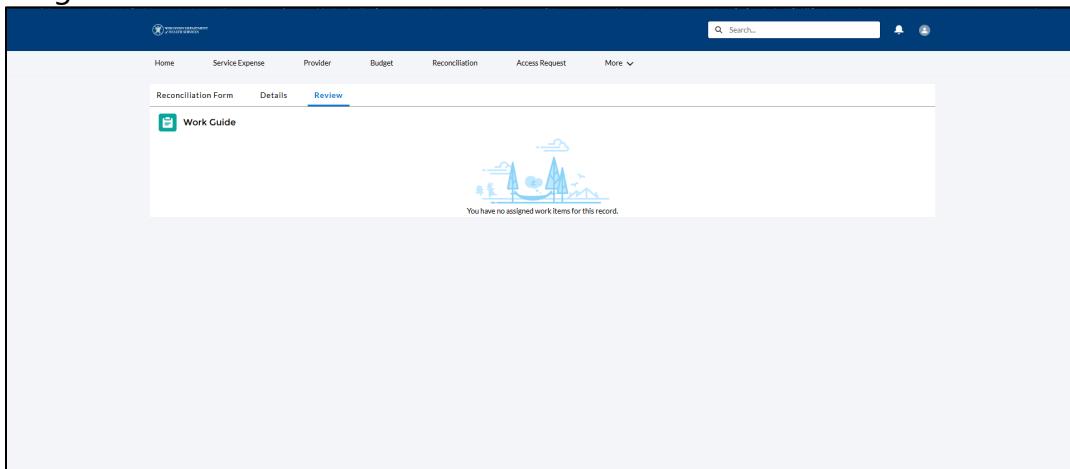
Hello,

The CCOP reconciliation form for CY1340 is now available. To complete your form, please log in to [HEART](#) and complete the reconciliation process.

Thank you,

Wisconsin DHS CCOP

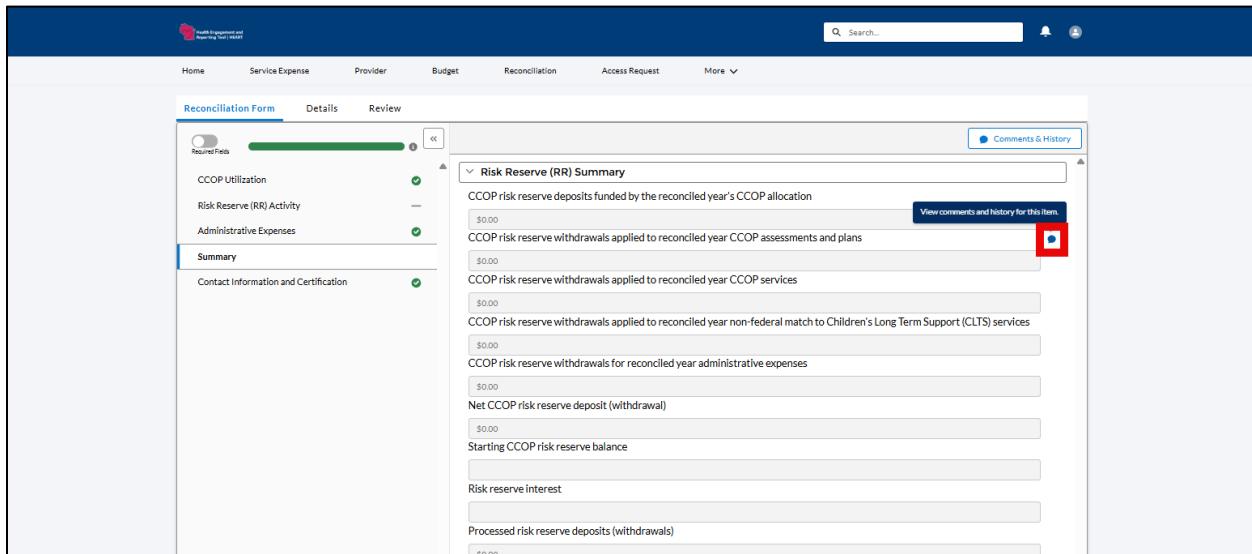
Note: When a reconciliation form is approved or rejected, the work guide has no assigned work items for the record.



3.4.4 Adding Comments as County Admins

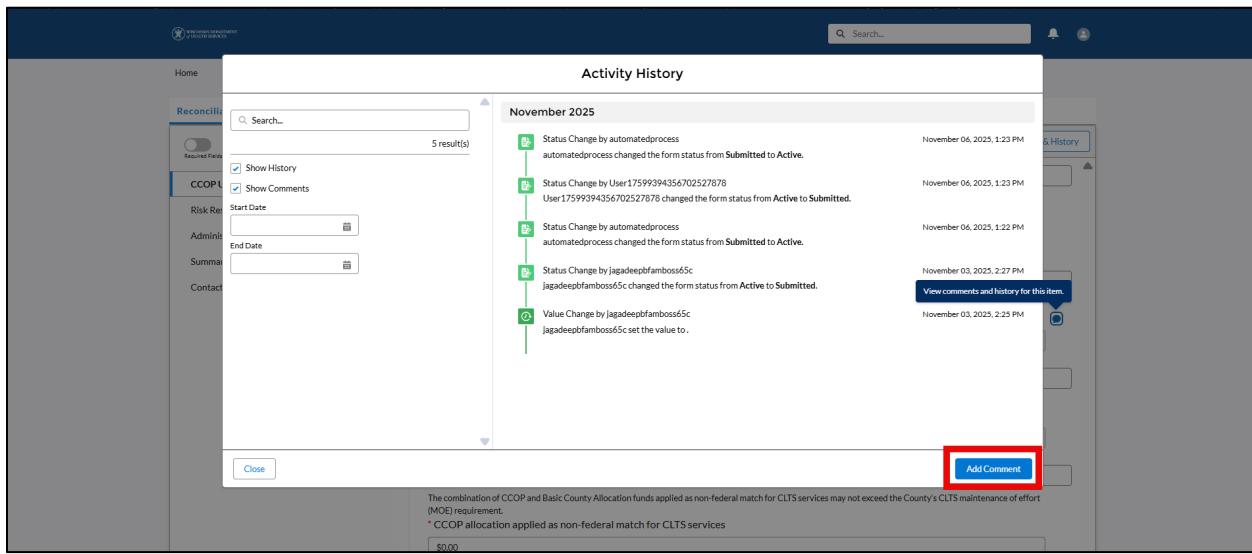
County admins can add comments for specific fields when rejecting a form. For example, if there's an issue with a particular field, they can leave a comment explaining the issue to the county user.

1. Start adding comments by clicking the comment icon next to the field you want to comment on.



The screenshot shows the 'Reconciliation Form' section of a web application. The 'Details' tab is selected. On the left, a sidebar lists sections: 'Required Fields' (green progress bar), 'CCOP Utilization' (green checkmark), 'Risk Reserve (RR) Activity' (grey), 'Administrative Expenses' (green checkmark), 'Summary' (blue bar), and 'Contact Information and Certification' (green checkmark). The 'Summary' section is expanded, showing the 'Risk Reserve (RR) Summary' sub-section. This section contains several input fields for risk reserve deposits and withdrawals, with a 'Comments & History' button and a 'View comments and history for this item' link. A red box highlights this button.

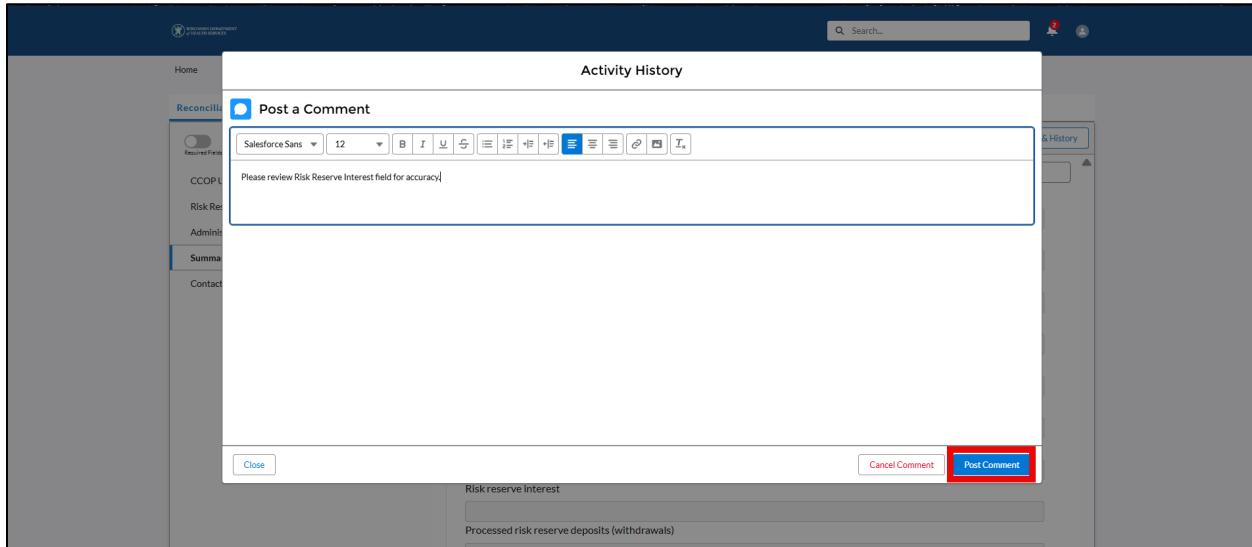
2. Select **Add Comment**.



The screenshot shows the 'Activity History' page. On the left, a sidebar has 'Reconciliation' selected. The main area shows a list of activity items under 'November 2025'. Each item has a small green icon and a timestamp. A red box highlights the 'Add Comment' button at the bottom right of the page.

A text editor will appear ready for any observations that need to be posted to the county user.

3. Click **Post Comment** to save comment.



3.5 Access Request Page

The Access Request page is where county users can request additional access or permissions after their initial access has been granted. For more information on submitting for initial access requests, see section 2.3 Submitting an Access Request Form.

Access Request Form Name	Account	CCOP Role	Status	Created By	Created Date
1 ARF-0150	Grant	County User	Approved		12/8/2025, 9:47 AM
2 ARF-0149	Dane	County User	Rejected		12/5/2025, 2:20 PM
3 ARF-0147	Brown	County User	Rejected		12/5/2025, 1:11 PM
4 ARF-0144	Dane	County User	Rejected		12/5/2025, 11:45 AM
5 ARF-0139	Dane	County User	Approved		11/19/2025, 4:43 PM
6 ARF-0138	Lincoln	County Admin	Approved		11/10/2025, 1:48 PM
7 ARF-0136	Langlade	County Admin	Approved	Peter Parker	11/7/2025, 6:19 PM
8 ARF-0135	Dane	County User	Approved		11/7/2025, 4:31 PM
9 ARF-0134	Dane	County User	Approved		11/7/2025, 3:13 PM
10 ARF-0133	Dane	County User	Approved		11/7/2025, 1:28 PM
11 ARF-0132	Dane	County User	In Review		11/7/2025, 11:33 AM
12 ARF-0131	Dane	County User	In Review		11/7/2025, 11:29 AM
13 ARF-0129	Milwaukee	County User	In Review		11/7/2025, 11:26 AM
14 ARF-0128	Dane	County Admin	In Review		11/7/2025, 9:40 AM

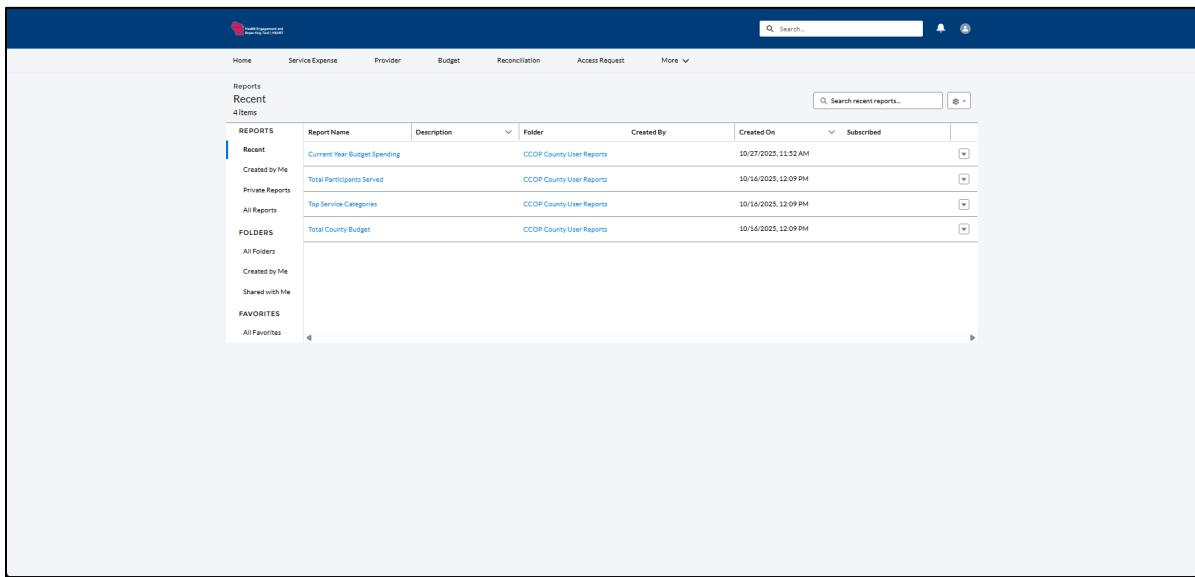
3.6 Reports Page

The Reports section in the CCOP system allows users to view pre-built reports about their county's data. County users and county admins can access reports through the navigation bar to see information about service expenses, budgets, providers, and participants for their county. If a user has access to multiple counties, the reports will aggregate data across all counties they have access to.

To reach the Reports Page, you may need to select the **More** dropdown to reveal more pages in the navigation bar.

What you'll see:

- **Left sidebar:** Recent, All Reports, Shared with Me, and Folders such as "CCOP County User Reports."
- **Main table columns:** Report Name, Description, Folder, Created By, Created On, Subscribed.

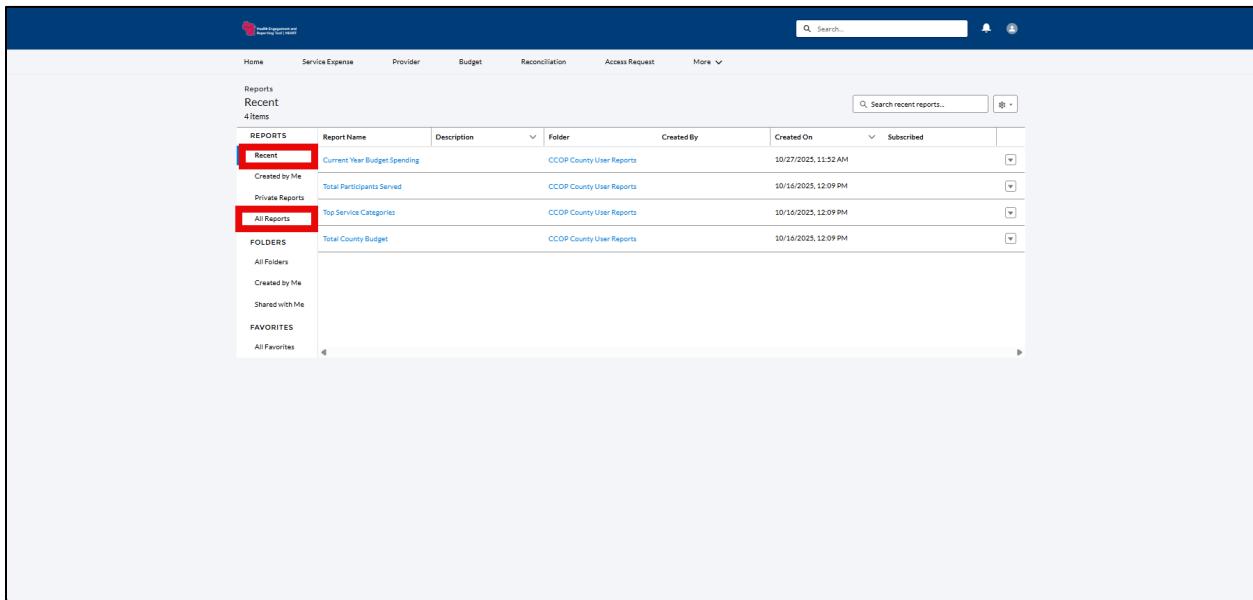


The screenshot shows the CCOP Reports Page. The top navigation bar includes links for Home, Service Expense, Provider, Budget, Reconciliation, Access Request, and a More dropdown. Below the navigation is a search bar and a 'Search recent reports...' input field. The main content area is a table titled 'REPORTS' with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table lists four recent reports: 'Current Year Budget Spending' (CCOP County User Reports, 10/27/2025, 11:52 AM), 'Total Participants Served' (CCOP County User Reports, 10/16/2025, 12:09 PM), 'Top Service Categories' (CCOP County User Reports, 10/16/2025, 12:09 PM), and 'Total County Budget' (CCOP County User Reports, 10/16/2025, 12:09 PM). The left sidebar contains navigation links for Reports (Recent, 4 items), Folders (Created by Me, Private Reports, All Reports), and Favorites (All Favorites). The bottom of the page shows a page number '4'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Current Year Budget Spending		CCOP County User Reports		10/27/2025, 11:52 AM	
Created by Me	Total Participants Served		CCOP County User Reports		10/16/2025, 12:09 PM	
Private Reports	Top Service Categories		CCOP County User Reports		10/16/2025, 12:09 PM	
All Reports	Total County Budget		CCOP County User Reports		10/16/2025, 12:09 PM	

To view a report

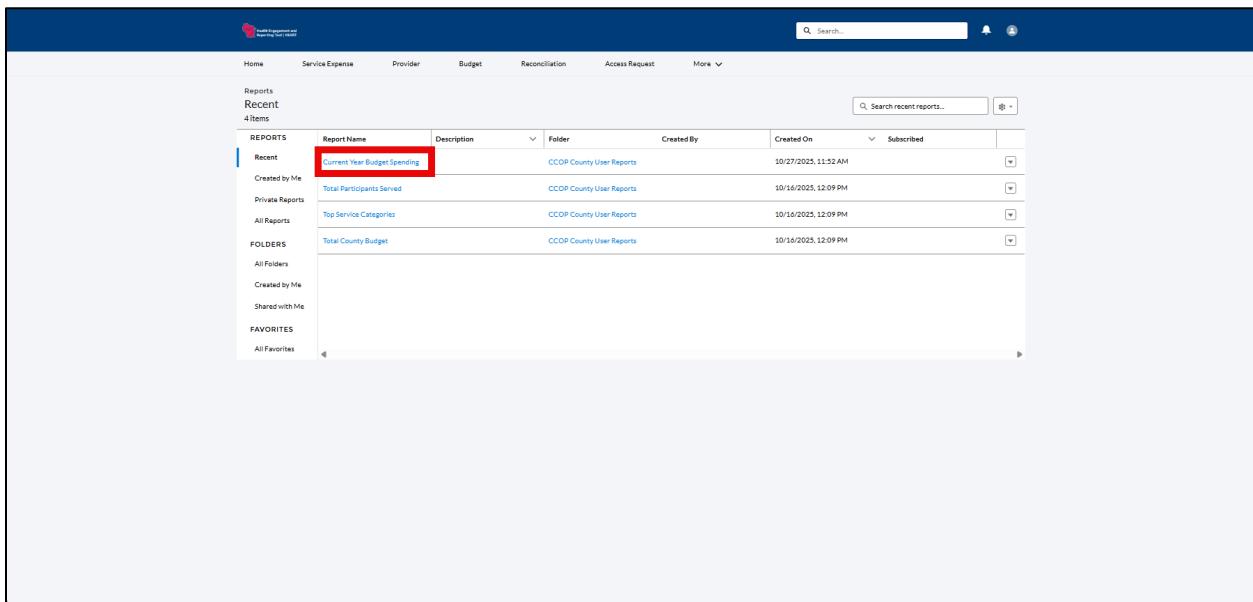
1. Go to Recent or All Reports.



The screenshot shows the 'Reports' section of the application. On the left, there is a sidebar with categories: 'Recent' (4 items), 'Reports' (Recent, Created by Me, Private Reports, All Reports), 'Folders' (All Folders, Created by Me, Shared with Me), and 'Favorites' (All Favorites). The 'Recent' and 'All Reports' buttons are highlighted with red boxes. The main content area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains four rows: 'Current Year Budget Spending' (CCOP County User Reports, 10/27/2025, 11:52 AM), 'Total Participants Served' (CCOP County User Reports, 10/16/2025, 12:09 PM), 'Top Service Categories' (CCOP County User Reports, 10/16/2025, 12:09 PM), and 'Total County Budget' (CCOP County User Reports, 10/16/2025, 12:09 PM).

Report Name	Description	Folder	Created By	Created On	Subscribed
Current Year Budget Spending		CCOP County User Reports		10/27/2025, 11:52 AM	
Total Participants Served		CCOP County User Reports		10/16/2025, 12:09 PM	
Top Service Categories		CCOP County User Reports		10/16/2025, 12:09 PM	
Total County Budget		CCOP County User Reports		10/16/2025, 12:09 PM	

2. Click the report name.



The screenshot shows the 'Reports' section of the application. The sidebar and table structure are identical to the previous screenshot. The 'Recent' and 'All Reports' buttons are highlighted with red boxes. The 'Current Year Budget Spending' report name in the table is also highlighted with a red box, indicating it has been selected.

Report Name	Description	Folder	Created By	Created On	Subscribed
Current Year Budget Spending		CCOP County User Reports		10/27/2025, 11:52 AM	
Total Participants Served		CCOP County User Reports		10/16/2025, 12:09 PM	
Top Service Categories		CCOP County User Reports		10/16/2025, 12:09 PM	
Total County Budget		CCOP County User Reports		10/16/2025, 12:09 PM	

Note: Users do not have the ability to create reports or folders; they can only view them.

3.6.1 Managing Reports

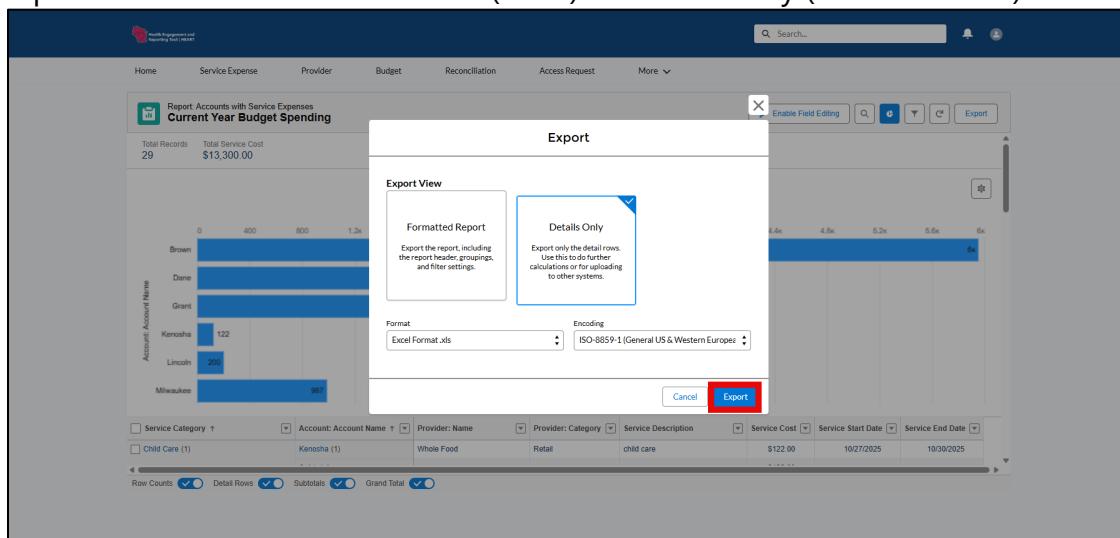
Each report includes:

- A chart summarizing the results. Hover over the chart components to see exact values.
- A table beneath the chart showing the underlying records the chart is based on

Core controls



1. **Enable Field Editing:** Click the pencil icon to edit values directly in the report table. Changes save automatically when you click outside the field.
2. **Search:** Use the search box above the chart to find specific records or values.
3. **Toggle Chart:** Toggle between seeing the report chart or simple report.
4. **Filter:** Adjust the current filters. Reports can be filtered by county.
5. **Refresh button:** Click the back arrow to refresh report to the most up to date data.
6. **Export:** Click the Export button to download the report data. You can export reports in two formats: Formatted (Excel) or Details Only (Excel and CSV).



7. **Row count:** The table displays the total number of rows returned based on your current filters, helping you gauge the volume of data.
8. **Detail Rows:** ON shows individual records, OFF shows grouped summaries only.

9. **Subtotals and Grand Total:** Toggle to display group level totals and an overall total when available.

