



Wisconsin
Department of Health Services

Medicaid Nursing Home Cost Reporting System (ORBS)

Division of Long Term Care
User Training
System & Training Overview




New Electronic Cost Report System

- Developed in partnership with the University of Wisconsin Center for Health Systems Research & Analysis (CHSRA).
- ORBS replaces previous paper-based process.
- Electronic cost reporting system allows users to:
 - Create online accounts for the new system;
 - Access user, facility, and cost report information;
 - Download the electronic cost report Excel template;
 - Prepopulate, import, and manually enter data;
 - Perform validation tests for completeness and accuracy;
 - Submit completed reports online; and
 - Access and review history for completed cost reports.

ORBS Cost Reporting Website

- ORBS = New cost reporting website
- ORBS website: <http://orbs.chsra.wisc.edu>

ORBS DEMO WEBSITE



Welcome to the Orbs website, designed by the [Center for Health Systems Research and Analysis \(CHSRA\)](#) to support the [Wisconsin Department of Health Services \(DHS\)](#) nursing home Medicaid rate setting process. Medicaid Cost Reports are a major component for calculating Medicaid Long Term Care (LTC) payments.

A Medicaid Cost Report is considered to be public information. Submitted Cost Reports can be publicly accessed on this website; a link will be provided on this page for downloading PDF versions of the nursing home Cost Reports.

You can access the Excel worksheet used to guide the completion of a Cost Report ([2014 Cost Report Input Spreadsheet v029](#)). If you need more information regarding regulations related to or instructions for completing Cost Reports, please visit the [DHS web site](#).

This website is designed to support the transfer of Cost Reports and supporting documentation from nursing homes to CHSRA for use by Wisconsin DHS staff. Registration and logon information will only be granted to those approved by nursing home administrative staff and Wisconsin DHS staff.

Username [I forgot my username](#)

Password [I forgot my password](#)

Don't have an Orbs login?
[Register for one here!](#)

[Help](#)



Cost Report Training Details

- Training will be broken into several sections:
 - Section One – User registration process & user types.
 - Section Two – Cost reporting website content.
 - Section Three – Download, populate, validate, and upload a completed cost report template.



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Department of Health Services


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User Training

Section One: User Registration Processes

New User Registration

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[Help](#)

Website created by [CHSRA](#)
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- First time users will need to register for an account.
- Only registered users can access and submit reports.



Registration Process Options

- Pre-launch: Facilities with early fiscal year-ends have been contacted to identify users. Users preloaded into ORBS; eliminates registration process.
- Same process will be offered for remaining facilities.
- After preload activities are complete:
 - User visits site and fills out registration request.
 - Request is automatically forwarded to Division of Long Term Care (DLTC) staff.
 - DLTC staff identifies primary cost reporting contact for that specific facility or chain.
 - DLTC forwards the request to the facility/chain contact.
 - Contact responds via email with approval or rejection.
 - DLTC staff executes the function in ORBS.
 - Requestor receives emails with username and password from ORBS.

ORBS Cost Reporting Website Registration

- Go to the ORBS website to start the registration process: <http://orbs.chsra.wisc.edu>.
- Click the [Register](#) link.



A screenshot of the ORBS website login page. The page features a login form with fields for 'Username' and 'Password'. To the right of each field is a link: 'I forgot my username' and 'I forgot my password'. Below the password field is a 'Login' button. To the right of the 'Login' button is a text prompt: 'Don't have an Orbs login? Register for one here!'. The word 'Register' is a blue hyperlink. A red oval is drawn around the 'Register' link. At the bottom left of the form is a 'Help' link. The entire form is enclosed in a dark blue border.

Username [I forgot my username](#)

Password [I forgot my password](#)

Login Don't have an Orbs login? [Register](#) for one here!

[Help](#)

ORBS Cost Reporting Website Registration

- Fill out the required information on each tab.

The screenshot shows a web form titled "Register for Orbs". At the top, there are four tabs labeled "Step 1", "Step 2", "Step 3", and "Step 4". A red arrow points from Step 1 to Step 2, and another red arrow points from Step 2 to Step 3, indicating a sequence of steps. Below the tabs, the "Step 1" section is active. It contains the heading "What is Your Email?" followed by the instruction "This should be the email you use for work purposes (e.g. jane@nursinghome.com).". Below this instruction is a text input field. Further down, there is a heading "Confirm Email" followed by another text input field.

Register for Orbs

Step 1 Step 2 Step 3 Step 4

What is Your Email?
This should be the email you use for work purposes (e.g. jane@nursinghome.com).

Confirm Email

ORBS Cost Reporting Website Registration

- On Step 3, select the appropriate user type, and POP ID (DHS facility code) or multiple facility organization name.

The screenshot shows a web form titled "Register for Orbs". At the top, there are four tabs labeled "Step 1", "Step 2", "Step 3", and "Step 4". "Step 3" is the active tab. Below the tabs, the form is divided into two sections. The first section, "My Contact Information", contains two text input fields: "Job Title" with the value "Administrator" and "Telephone" with the value "123-456-7890". The second section, "My User Type", contains a dropdown menu with the following options: "Single Facility User", "Select Type", "Single Facility User" (highlighted in blue), and "Multiple Facility User". To the right of this dropdown is another dropdown menu with a downward arrow.



ORBS User Types

- If a user selects **Single Facility** permissions, then that user can submit a cost report for only the **single** POP ID that the user selects.
- If a user selects **Multiple Facility** permissions, then that user can submit a cost report for **any** POP ID associated with that chain or accounting organization.



ORBS Cost Reporting Website Registration

- On Step 4, verify user information, enter the Security Check code, and click the Continue button to submit your request.
- Individual user requests will be verified with the organization for which you are applying.
- Verification and password will be sent to the requestor via email after the organization approves the request for access.



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Section Two: Cost Report Website Details



Cost Reporting Website (ORBS)

- ORBS = New cost reporting website
- Website location: <http://orbs.chsra.wisc.edu>
- Here you will:
 - Create a user profile through the registration process;
 - Review facility & user profile information;
 - Find contact information for various help topics;
 - Review Frequently Asked Questions;
 - Download the cost report Excel template;
 - Upload completed reports and supporting documents; and
 - Access and review cost report history.




ORBS – User Information Tab

The User Information tab allows you to:

- Change your password.
- Update user specific information.
- See details associated with the facility including:
 - Facility address, POP ID, and Ownership.
 - Current Division of Long Term Care (DLTC) auditor.
 - Current ORBS users for your organization.
 - Associated accounting organization or chain name.

ORBS – User Information Tab

ORBS DEMO WEBSITE

Welcome **Brett Holinbeck** [Log Out](#)

[Home](#) [Cost Reports](#) [FAQ](#) [Contact Us](#) [User Information](#)


User Information

My Account Status

Password Status
Account has had the same password for 34 day(s)
[Change Password](#)

My Basic Information

Information that cannot be changed has been marked with an asterisk.

Username* brettwigov	Email* brett.holinbeck@wisconsin.gov	User Type* Nursing Home
Display Name Brett Holinbeck	Job Title Project Manager	Phone Number 123-456-7890 

My Nursing Home

Email needed changes to the Orbs help desk at orbshelp@chsra.wisc.edu.

POP ID 12345	Name Rocky Knoll Health Care Facility	Address 12345 6TH ST Plymouth, WI 53072	County Sheboygan	Ownership County
Current Auditor John Doe	Chain None	Accounting Organization None		



ORBS – Contact Us Tab

The Contact Us tab allows users to:

- Identify the DLTC auditors associated with facilities;
- Find applicable auditor contact information; and
- Find Center for Health Systems Research & Analysis (CHSRA) help desk information for technical questions.

ORBS – Contact Us Tab



Welcome Brett Tombeck [Log Out](#)

[Home](#)

[Cost Reports](#)

[FAQ](#)

[Contact Us](#)

[User Information](#)

Contact Us

Wisconsin Division of Long Term Care

All questions regarding Cost Reports should be directed to your Auditor, listed in bold below:

Name	Phone Number	Email	Location
Darlene Cater	(715) 836-3868	Darlene.Cater@dhs.wisconsin.gov	Eau Claire
Grant Cummings	(608) 267-8811	GrantR.Cummings@dhs.wisconsin.gov	Madison
Jane Gottwald	(715) 836-3059	Jane.Gottwald@dhs.wisconsin.gov	Eau Claire
Greg Leighty	(608) 266-9746	Gregory.Leighty@dhs.wisconsin.gov	Madison
Scott Manthey	(608) 264-8108	Scott.Manthey@dhs.wisconsin.gov	Madison
Sandy McKain	(262) 354-4468	Sandra.McKain@dhs.wisconsin.gov	Waukesha
Dave Medley	(262) 650-4455	David.Medley@dhs.wisconsin.gov	Waukesha
Sarah Olson	(920) 445-5270	Sarah.Olson@dhs.wisconsin.gov	Green Bay

Contact your DLTC auditor for questions about cost report content and reporting requirements.

DLTC auditors for specific nursing facilities will be shown in **bold**.



Technical Support

Login assistance and technical questions can be directed to:

Center for Health Systems Research and Analysis (CHSRA)
University of Wisconsin - Madison
610 Walnut Street
Madison, WI 53726-2397

Phone: 1-888-300-8098

E-mail: orbshelp@chsra.wisc.edu



ORBS – Cost Reports Tab

The Cost Reports tab allows users to:

- Download the most current cost report template;
- Submit completed reports and supplemental documents;
- Review cost report submission history; and
- Download previously submitted reports and documents.

ORBS – Cost Reports Tab



welcome Brett Holinbeck [Log Out](#)

[Home](#)[Cost Reports](#)[FAQ](#)[Contact Us](#)[User Information](#)

Cost Reports

[2014 Cost Report Input Spreadsheet v029](#)

← Click here to download the template.

Submit Cost Report

Use the button below to submit your nursing home's Cost Report. After the Cost Report file has been uploaded, you will be prompted to submit any required supporting documents. Please make sure that you have these documents (found in the "Checklist" tab of the Cost Report input spreadsheet) before starting this process.

Submit Cost Report

← Click here to submit a completed cost report.

This cost report must be signed and submitted before the information included in the cost report can be used to calculate Medicaid payment rates. Misrepresentation or falsification of any information contained in this report may be punishable by fine and/or imprisonment under state or federal law.

Please print Schedule One of the cost report, sign sections B and C as required, scan the document, and be prepared to upload the file of the scanned document when prompted.

By clicking on the submit button above, I HEREBY CERTIFY that I am authorized by the provider to submit this cost report.

Cost Report Submission History

Below is a list of the Cost Reports that have been submitted for your nursing home(s). This list can be filtered by using the options at the top of each column. You can get more information about each file by clicking the file name.

13 Cost Reports

Click the links to download previous reports.

Original File Name	POP ID	Year	Type	Submitted By	Submitted Date	Submission Status	Active	Submission Comment
ORBS Template V029 - EXAMPLE ABC NH.xlsm	774	All	R0	All		All	All	
ORBS Template V029 - EXAMPLE ABC NH.xlsm	774	2014	R0	Brett Holinbeck	2014/08/27 02:56:54pm	Accepted	Yes	This is a comment
774-14-R0-01.xlsm	774	2014	R0	IS Staff CHSRA	2014/08/26 10:30:30am	Rejected	No	test



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Section Three: Downloading, Using, and Uploading
The New Cost Report Template

The New Cost Report Template: a Few Notes...

- Read the cost report template instructions thoroughly.
- A cost report policy instructions tab is also available.
- The template contains over 3,500 possible data fields.
- There are options for both manual entry or data import.
- Hundreds of data validations are running in the template, such as:
 - Tests for required fields;
 - Tests for various calculations; and
 - Tests for conditional logic; if cell X, then cell Y.



Downloading the Template

- Login to the ORBS cost reporting website.
- Go to the Cost Reports tab.
- Click the Cost Report Input Spreadsheet hyperlink.
- Save the Excel spreadsheet to your hard drive.
- Open the spreadsheet and read all instructions before beginning the data entry process.

Template Instructions Tab

ORBS Template V031 Master Copy.xlsm - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

E7

A B C

1 **Wisconsin Medicaid Nursing Home Cost Report Template Instructions**

2

3 **Test Version V031**

4

5 **Provider-User Keyboard Shortcuts**

6

7 **Ctrl-Shift-B** Loads beginning values for PopID into schedules & runs full validation

8 **Ctrl-Shift-V** Refresh spreadsheet validation

9 **Ctrl-Shift-Z** Toggles all worksheet zoom settings; decreases by 10% to 50% then to 150%

10 **Ctrl-Shift-H** Moves to upper-left corner of screen, even if worksheet is protected;
If already at cell A1, then go to "Checklist" worksheet

11

12

13 **Provider-User Instructions**

14

15

1 Click on the worksheet tab to enter values into the corresponding schedule.
Enter values into cells highlighted in light yellow.
Gray cells are formulas and cannot be selected or changed.

2 Please start by entering the facility PopID into Schedule 1 and then pressing Ctrl-Shift-B to load several values from the 2013 cost report in cells in Schedules 1, 3, 26, 51 and 53. Note that values will only be loaded if a 2013 cost report is available and contains values for the se

Template Instructions CR Instructions CR Control Checklist 1 2 3 4 5 6 7-8-9 10 10A 11 12 13 14 15

Ready

Read all Template Instructions before beginning data entry activities.

Data Import Option

Please see the note on the Template Instructions tab if you wish to pursue data import features for the template.

ORBS Template V031 Master Copy.xlsm - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

E7

A B C

1 **Wisconsin Medicaid Nursing Home Cost Report Template Instructions**

2

3 **Test Version V031**

4

33

34 **Notes for users interested in importing values into the template from other systems**

35

If you will be completing several nursing home templates each year the process can be mechanized by constructing a vector of input values, inserting them in the appropriate location in the template and running a load macro to post the values to the schedules. There is a hidden worksheet, "CR_Vector", which lists all 3,000+ fields (input and formulas) for the entire cost report template. The columns of this table contain specifications for each field, including value type (integer, category, decimal numeric, etc.), input vs. formula, display format, validation requirements (which other cells trigger the field to be completed, etc.), and other characteristics. Column 73, "Saved Vector", can be replaced by user-supplied values meeting the constraints of the other columns. A load macro can then be run via Ctrl-Shift-L to post the input cell values to the appropriate positions in the template schedules. Ctrl-Shift-V will then apply the full validation process, the results of which can be seen, field by field, in the other columns of CR_Vector. Schedule-level error counts can be obtained from the "Checklist" worksheet. **CHSRA is willing to help providers who attempt to build their own mechanical interfaces to the template.**

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Template Instructions CR Instructions CR_Control Checklist 1 2 3 4 5 6 7-8-9 10 10A 11 12 13 14 15

Ready



Schedule Completion Checklist

- The cost report template contains a Checklist tab. Please use this tab to monitor your cost report status.
 - Schedules with errors are highlighted in red.
 - Quantity of errors per schedule are displayed.
 - Required supplemental documents are highlighted in blue.
- Double clicking a schedule box takes you to that specific schedule.
- **IMPORTANT:** Cost reports can only be submitted when the Checklist tab shows zero errors and the validation status is current.

Schedule Completion Checklist

Schedule Completion Checklist			
Validation status is current; 1 schedule contains errors (Do not submit until errors are resolved...)			
Double-click on schedule name to go to schedule		Please report any unresolved formula errors to CHSRA	
Schedule Name	Input Errors	Formula Errors	Schedule Status
Sched_01	-	-	Okay
Sched_02	-	-	Okay
Sched_03	-	-	Okay
Sched_04	-	-	Okay
Sched_05	-	-	Okay
Sched_06	-	-	Okay
Sched_07	-	-	Okay
Sched_10	-	-	Okay
Sched_10A	1	-	Error
Sched_11	-	-	Okay
Sched_12	-	-	Okay
Sched_13	-	-	Okay
Sched_14	-	-	Okay
Sched_15	-	-	Okay
Sched_16	-	-	Okay
Sched_17	-	-	Okay
Sched_18	-	-	Okay
Sched_20	-	-	Okay
Sched_21	-	-	Okay
Sched_22	-	-	Okay
Sched_23	-	-	Okay
Schedule Name	Input Errors	Formula Errors	Schedule Status
Sched_24	-	-	Okay
Sched_25	-	-	Okay
Sched_25A	-	-	Okay
Sched_25B	-	-	Okay
Sched_26	-	-	Okay
Sched_26ATT	-	-	Okay
Sched_26ATTRP	-	-	Okay
Sched_26B	-	-	Okay
Sched_26RP	-	-	Okay
Sched_27	-	-	Okay
Sched_28	-	-	Okay
Sched_29	-	-	Okay
Sched_30	-	-	Okay
Sched_30RP	-	-	Okay
Sched_31	-	-	Okay
Sched_31RP	-	-	Okay
Sched_32	-	-	Okay
Sched_32RP	-	-	Okay
Sched_33	-	-	Okay
Sched_33P2	-	-	Okay
Sched_33P2RP	-	-	Okay
Schedule Name	Input Errors		
Sched_33RP	-		
Sched_34	-		
Sched_34RP	-		
Sched_35	-		
Sched_36A	-		
Sched_36B	-		
Sched_37	-		
Sched_37RP	-		
Sched_39	-		
Sched_40	-		
Sched_41	-		
Sched_42	-		
Sched_43	-		
Sched_43A	-		
Sched_45	-		
Sched_46	-		
Sched_49	-		
Sched_50	-		
Sched_51	-		
Sched_52	-		
Sched_53	-		
Spreadsheet Validation Current			
Required?	Supporting Documents		
Yes	Schedule 1 (scanned version that has been signed by the proper person)		
Yes	Self-Funded Fringe Benefits Documentation (as reported on Schedule 28 per Schedule 3, line 5)		
Yes	Certified Audit (per Schedule 3, line 11)		
Yes	Trial Balance (final adjusted, with reconciliation per Schedule 3, line 13A)		
Yes	Asset Depreciation Schedules (as reported on Schedule 34 per Schedule 3, line 13B)		
Yes	Home Office Cost Allocation Report (required for non-government facilities with allocated home office costs on Sch 26, Line 6)		

Required supporting documents will be identified as the report is completed.



Submitting a Completed Cost Report

The user must have:

- An ORBS system login and password.
- A completed cost report without errors and a current template validation status.
- Supporting documents in electronic formats, such as:
 - Signed and scanned schedule 1 PDF;
 - Trial balance Excel spreadsheet;
 - Asset depreciation Word document; and
 - Other relevant materials.



Submitting a Completed Cost Report

- Login to the ORBS website: <http://orbs.chsra.wisc.edu>.
- Go to the Cost Reports tab.
- Click the Submit Cost Report button.
- Select the correct POP ID (DHS facility code) and year from drop down menus.
- Use the Browse button to select the completed cost report template.
- Add an optional comment, if you wish.
- Click the Continue button to start the submission process.
- Next, use the browse buttons to select supporting documents.
- Click the Continue button to complete the submission process.



Congratulations!

- Your cost report is done!
- Email notifications are sent to the report submitter and the Division of Long Term Care (DLTC) auditor.
- Completed reports can be viewed under the Cost Report Submission History header.
- **IMPORTANT:** Only one cost report can be submitted by a nursing home user per year. If adjustments or partial year submissions are needed, then contact your DLTC auditor.