



# PPS Training

revised 1/2012

**Core Service Reporting in the  
Program Participation System  
(PPS)**



# Reporting Core Services in PPS

- Beginning with 2012 dates of service, Core service data previously reported in the Human Services Reporting System (HSRS) will be reported in the Program Participation System (PPS) under “Core Services”.
- Most local agencies enter Core service data through PPS web screens; however, an option is available to upload Core service data in an XML format. Please contact the SOS Desk for more information about the upload process and requirements.



# What's new to Core Reporting in PPS?

- Client ID: PPS uses a Master Client Index (MCI) ID to identify clients for service reporting. A HSRS Client ID number is not used in PPS, but local data fields exist to store identifiers that can be used for local data purposes.
- Provider ID: PPS uses the Wisconsin Provider Index (WPI) ID to identify providers in the PPS system. A conversion of current Core, MH and AODA providers is ongoing and a web-based registry is being developed. Until that service is available, contact the Help Desk for WPI registration.
- Episode and SPC start dates are required for Core services reported in PPS.

# Accessing PPS

- PPS requires a WAMS ID and security access to PPS and Core Services.
- For instructions on how to obtain a WAMS ID and to request access to PPS and Core service reporting please see the PPS Training power point titled, “Getting Access to PPS”.
- To obtain “Getting Access to PPS” power point or if you are authorized to access PPS but experience issues logging in, please contact the DHS SOS Desk:

Hours: Mon-Fri 8:00 -11:30 AM, 12:30 – 4:00 PM

Email: [DHSSOSHelp@wisconsin.gov](mailto:DHSSOSHelp@wisconsin.gov)

Phone: (608) 266-9198 Fax: (608) 267-2437

# PPS Navigation Guide

- Once logged into PPS, you can navigate PPS screens using the links available in the menu on the left side of the screen.
- The “PPS Navigation” power point is a guide to navigating PPS screens used by all modules, providing information on searching PPS for clients, MCI search and clearance pages, and new MCI registration. Use “PPS Navigation” in combination with this power point as a guide to Core service reporting in PPS.
- To obtain the “PPS Navigation” power point or if you experience issues navigating PPS, contact the DHS SOS Desk:

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# Navigation: Search vs. Basic Registration

- “Search” – searches PPS for existing records for Core Services or other PPS modules.
  
- “Basic Registration” – searches for MCI ID and creates a new MCI ID if the individual is not found.
  
- “Search” for a client in PPS first to avoid duplicates
  - Individuals may have PPS service records from other PPS modules or may have received services through another agency.
  - Search requirements: Name and date of birth -or- SSN.
  - A search may return multiple results depending on which fields are used to search. Additional details are available in the search results to determine if it is the correct individual.
  
- If client is not found, proceed to “Basic Registration”
  - Basic Registration requirements: First Name, Last Name, Gender, date of birth. SSN will improve search results.
  - An MCI clearance page will display results that closely match the information you entered on the registration page, or, if the individual is not found, allow you to create a new MCI ID.

# Reporting clients and service details in PPS Core module

- Like HSRS, data reported to PPS is collected by client, episode and service.
- Using SSN to search for PPS clients and for MCI search and registration will improve search results and avoid duplication.
- Please use the “PPS Navigation” power point and this power point together for a guide to Core service reporting. The following slides begin Core episode and service reporting at the Individual Summary page, which is the end of the “PPS Navigation” power point.
- **Important PPS Navigation Note**: Remember to check “**Cancel**” box near the upper right PPS screen to navigate away from the data entry page without saving, even if you have **NOT** entered data (see next slide).

# Select Cancel to navigate away from any data entry page.

In this Core Services Detail page example, no data has been entered. If an individual wants to navigate to any of the links inside the red box on the left, they must check the “Cancel” box inside the red circle (upper right) and then select the desired link. See the “PPS Navigation” power point for further information.

The screenshot displays the 'Program Participation System - Core Service Details' interface. The browser title bar indicates it is provided by DHS - State of Wisconsin. The user is logged in as 'W Emslie' with User ID 'PWRHC4'. The client is identified as 'Ppscoredemo Person 1 67M' with MCI# 6302247969. The page is titled 'Core Service Details' and contains a 'Service Details' form with fields for SPC, Target Group, and Provider WPINPI, along with date pickers for SPC Start Date, SPC End Date, and SPC Review Date. A 'Cancel' checkbox is highlighted with a red circle in the upper right corner of the main content area. On the left, a 'Navigation Menu' is visible, listing various system functions such as PPS Main Menu, Individuals, Service Reporting, Work Management, and Reports. The 'Core Service Details' link in the navigation menu is highlighted with a red box.



Once a client is found in a PPS Search, found in a MCI clearance search or has been registered through basic registration (see “Navigating PPS” power point), a Core service episode can be created from the Individual Summary Page.

Program Participation System - Individual Summary - Windows Internet Explorer provided by DHS - State of Wisconsin

Program Participation System User ID: PWRHC4 User Name: W Emslie

TRAINING

Navigation Menu

- PPS Main Menu
  - PPS Home
  - Search
  - Inbox
- Individuals
  - Basic Registration
  - Individual Information
    - Individual Summary
    - Birth to 3 Reporting
    - Correspondence
    - Incident Reporting
    - Notes
    - Service Reporting
- Work Management
  - Employment Outcomes
  - Family Care Support
  - Financial Reporting
  - Incident Management
  - LEA Notification
  - Referral Management
  - Workload Management
  - Waitlist Management
- Reports
  - Reports List
- System Administration
  - Agency Administration

Individual Summary

Cancel  Reset

Basic Information

Title:

\*First Name:  Middle Name:  \*Last Name:

Suffix:

\*Gender:

\*Birth Date:  /  /

SSN:  -  -  SSN Verification: Unverified SSN Last Updated Date: 01/18/2012

This individual is currently on Medicaid:

Last Updated By: Emslie William


County Of Responsibility:

Save

Episode Reporting Information

Episode Type:  + Add

Responsible Agency	Program	Start Date	End Date	Navigation	Download
This person is not on your agency's Episode Reporting.					



If an individual found through a PPS search or MCI clearance page has previous Core service episodes reported in PPS, the previous episodes may be updated or a new Core episode can be created.

Program Participation System - Individual Summary - Windows Internet Explorer provided by DHS - State of Wisconsin

Program Participation System User ID: PWRHC4 User Name: W Emslie Help Logout

TRAINING

### Navigation Menu

- PPS Main Menu
  - PPS Home
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    - Incident Reporting
    - Notes
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- Work Management
  - Employment Outcomes
  - Family Care Support
  - Financial Reporting
  - Incident Management
  - LEA Notification
  - Referral Management
  - Workload Management
  - Waitlist Management
- Reports
  - Reports List
- System Administration
  - Agency Administration

### Individual Summary

Cancel  Reset

#### Basic Information

Title:

\*First Name:  Middle Name:  \*Last Name:

Suffix:

\*Gender:

\*Birth Date:  /  /

SSN:  -  -  SSN Verification: Unverified SSN Last Updated Date: 11/15/2011

This individual is currently on Medicaid:  Last Updated By: Emslie William

County Of Responsibility:


Save

#### Episode Reporting Information

Episode Type:  + Add

Responsible Agency	Program	Start Date	End Date	Navigation	Download
OPIB CORE	Core	12/19/2011		<input type="text" value="Core Service"/> Go	<input type="button" value="Download"/>

Previous



Core Service Reporting page – this page shows all services reported for a Core service episode. Required fields to save an episode are noted with a red asterisk. Red arrows show where service details can be added or updated.

**Agency and County Information**

Agency: OPIB CORE Worker ID:   
 Related Family ID:  Local Data:   
 County of Responsibility:

**Case Information**

\* Start Date: 01 / 01 / 2012 Case Review Date: 01 / 10 / 2012  
 Closing Date: MM / DD / YYYY Closing Reason:   
 Diagnosis:

**Primary Residence**

Address:  County/Tribe of Residence:   
 City:  Phone:   
 State:  Zip:

**Race & Ethnicity**

\* Race:  American Indian or Alaska Native  Native Hawaiian or Other Pacific Islander  Asian  White  Black or African American  Unknown  
 \* Ethnicity:  Hispanic/Latino  Non-Hispanic/Latino  Unknown

**Client Characteristics**

\* Please select up to 3 characteristics to describe the client:

02 - Mental illness (excluding SPMI)  
 03 - Serious and persistent mental illness (SPMI)  
 04 - Alcohol client  
 05 - Drug client  
 07 - Blind/visually impaired  
 08 - Hard of hearing

18 - Alzheimer's disease/related dementia  
 39 - Gambling client

**Services**

SPC	Provider WP/INPI	SPC Date From	SPC Date To	View
401-Congregate meals	10063400	01/10/2012		<input type="button" value="View"/>
402-Home delivered meals	10063000	01/10/2012		<input type="button" value="View"/>

# Core Service Detail page

Services are reported by SPC, Target Group, Provider WPI and SPC start and end dates. SPC and Target Group can be selected from drop down menus. SPC start, end and review dates can be keyed or selected with the calendar icon to the right of each date field. A WPI or NPI ID must be used for provider reporting (provider search shown in next slide). Until the web-based WPI registry is available, contact the SOS Desk to register providers.

The screenshot displays the 'Program Participation System - Core Service Details' interface. The browser title bar indicates 'Program Participation System - Core Service Details - Windows Internet Explorer provided by DHS - State of Wisconsin'. The user is logged in as 'W Emslie' (User ID: PWRHC4). The client information is 'Ppscoredemo Person 1 67M' (MCI #: 6302247969). The page is titled 'Core Service Details' and features a 'Navigation Menu' on the left with categories like 'PPS Main Menu', 'Individuals', 'Service Reporting', 'Work Management', 'Reports', and 'System Administration'. The main form area contains the following fields:

- SPC: [Dropdown menu]
- SPC Start Date: [MM/DD/YYYY] [Calendar icon]
- Target Group: [Dropdown menu]
- SPC End Date: [MM/DD/YYYY] [Calendar icon]
- Provider WPI/NPI: [Text input] [Search icon]
- SPC Review Date: [MM/DD/YYYY] [Calendar icon]

A red arrow points to the 'Provider WPI/NPI' field, which is labeled 'WPI Search'. The form also includes buttons for 'Duplicate', 'Add', 'Delete', 'Cancel', 'Reset', 'Next Service', and 'Return'.

# Provider Search:

WPI providers may be searched for on any combination of NPI or WPI ID, Organization Name, First Name, Last Name, City, Zip Code, or Tax ID fields. Provider Numbers in search results (circled in red) are active links and when selected will automatically populate the Provider Number field on Core Service Details page.

The screenshot shows a web application interface for the Program Participation System. The main window is titled "Program Participation System - Core Service Details" and displays user information (User ID: PWRHC4, User Name: W Emslie) and client information (Client: Ppscoredemo Person 1 67M, MCI #: 6302247969). A "Navigation Menu" is visible on the left, and a "Core Service Details" section is active. A "Provider Search" window is open, showing a search form with fields for Provider WPI/NPI, Organization Name, First Name, Last Name, City, Zip Code, and Tax Id. The "Organization Name" field is filled with "Mendota Mental Health". A "Search" button is present. Below the search form is a table with the following data:

Provider Number	First Name	Last Name	Organization Name	City	State	ZIP
<a href="#">10063400</a>			MENDOTA MENTAL HEALTH INST	MADISON	WI	53704

A "Close" button is located at the bottom of the search window. The "Provider Number" 10063400 in the search results is circled in red.

# Workload Management Page

The Workload Management page allows you to search Core Service recipients on a number of client, local data, episode and service fields. The link to the Workload Management page is in the lower half of the left hand menu.

The screenshot displays the 'Workload Management' page within the 'Program Participation System'. The browser title bar indicates 'Program Participation System - Workload Management - Windows Internet Explorer provided by DHS - State of Wisconsin'. The user is logged in as 'W Emslie' with user ID 'pwrhc4'. The page features a navigation menu on the left, where 'Workload Management' is highlighted with a red circle. The main content area is titled 'Workload Management' and includes a 'Filter Options' section with dropdown menus for 'Agency' (set to 'UAT OPIB Core Services Access') and 'Module Type' (set to 'Core'). Below this are 'Individual Details' fields for 'First Name', 'Last Name', and 'MCI ID'. The 'Service Details' section contains various search criteria including 'SPC', 'SPC Start Date From/To', 'Open Services Records Only?', 'No Units', 'Local/Client data', 'Service Worker ID', 'SPC Review Month From/To', 'Case Review Date From/To', and 'Consumer Status' (with an 'Out of Date Consumer Status' checkbox). A 'Search' button is located at the bottom right of the form.

# Who to contact for Core reporting information/issues?

- SOS Desk

- Hours: Monday through Friday

- 8:00 – 11:30 AM

- 12:30 - 4:00 PM

- (you may leave voice mail at other times and someone will return your call)

- E-mail: [DHSSOSHelp@wisconsin.gov](mailto:DHSSOSHelp@wisconsin.gov)

- Phone: (608) 266-9198

- Fax: (608) 267-2437