WISCONSIN DEPARTMENT *of* **HEALTH SERVICES**

Division of Care and Treatment Services

Quick Guide to Running PPS PORTAL Reports

Accessing Business Objects

1. Using your web browser, access ForwardHealth at: https://www.forwardhealth.wi.gov/WIPortal/
2. Click on the Partners button:

3. Using the credentials you submitted during the access request process, sign in on the right-hand side of the page:

4. After logging in, you will be brought to your Partner Secure Homepage. Click the Business Objects WebI link on the right-hand side of the page:
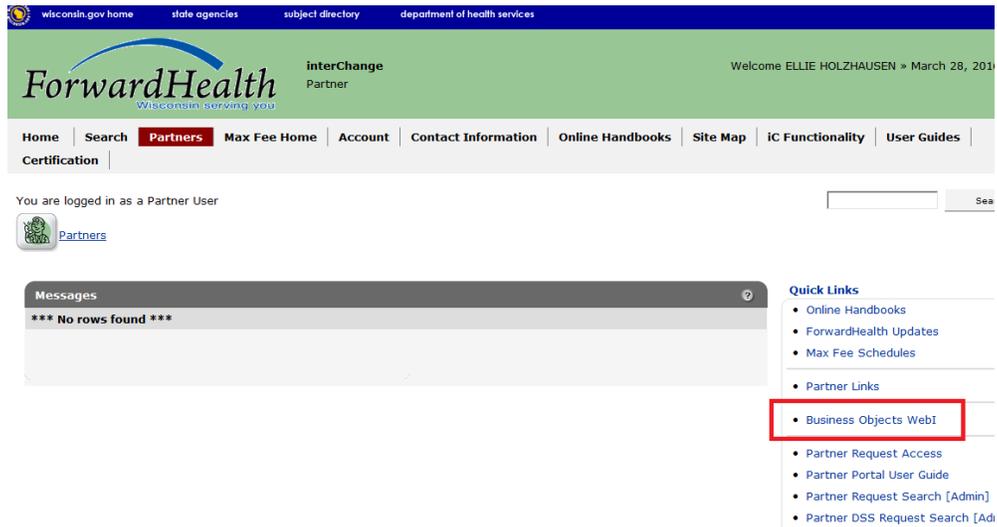
5. Click on the link "Business Objects (Link to WEBI)":
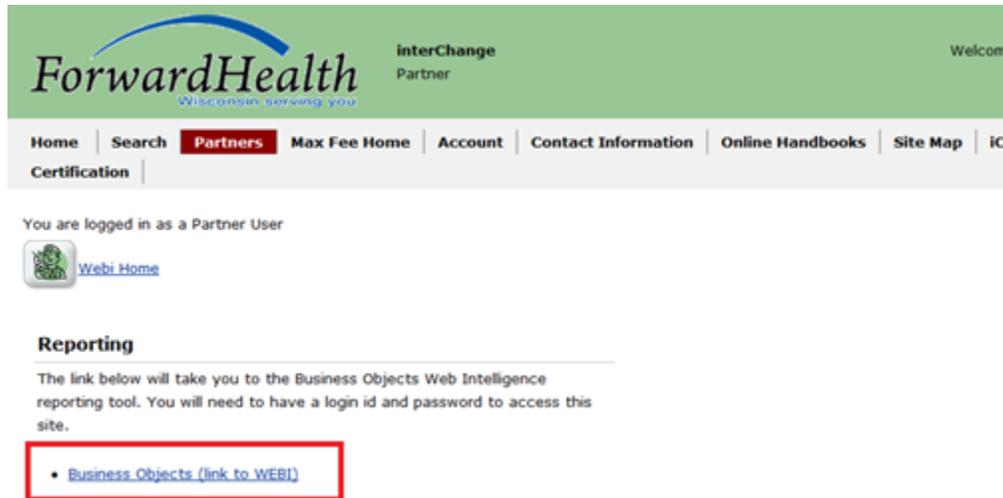
6. A new tab will open, showing a login screen. Log in using the same credentials that you used to log in to the ForwardHealth Portal:
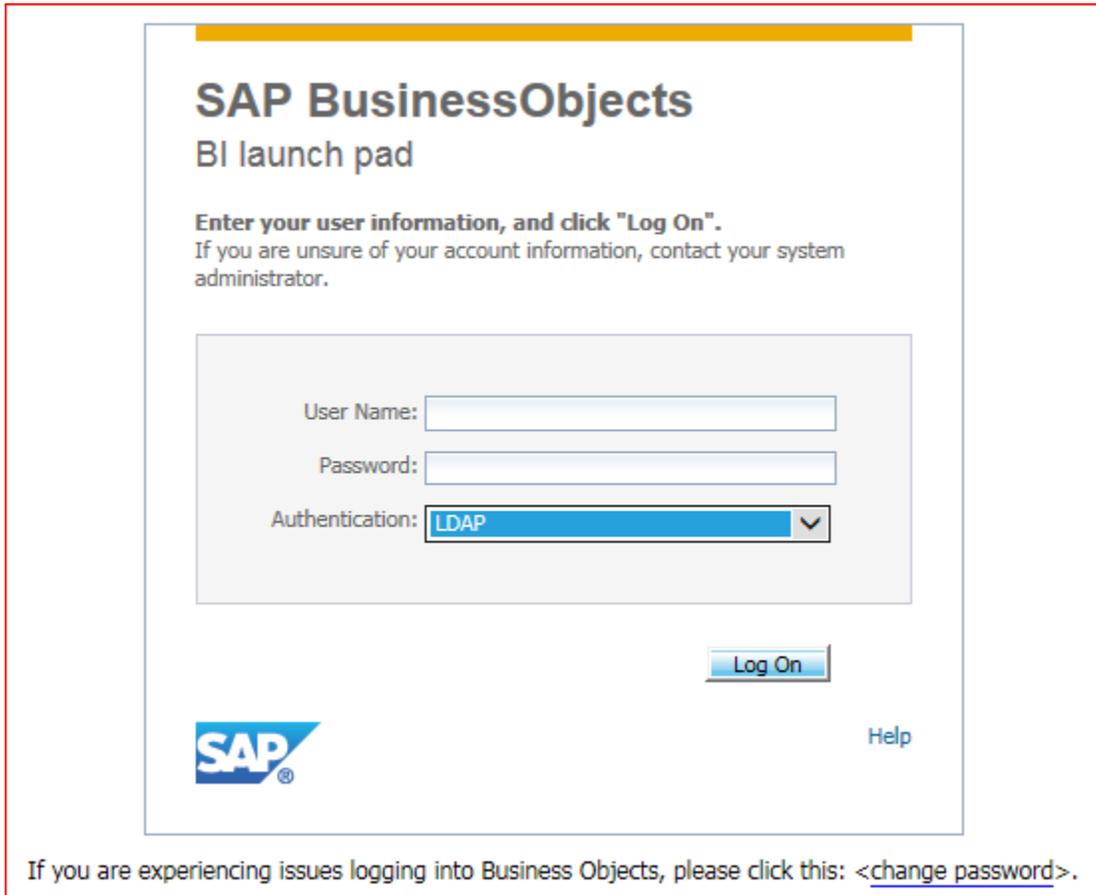
7. You will be taken to your WEBI homepage. To access reports, click on the **Documents** tab:
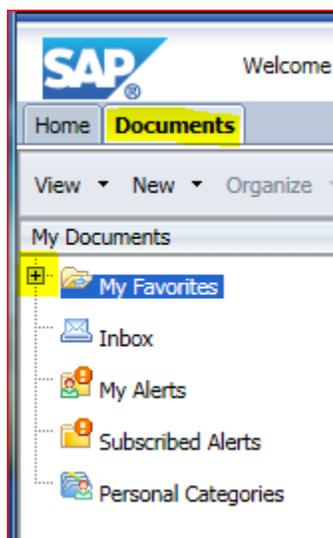
8. This will take you to a list of all the documents available to you. You will need to navigate to the lower left-hand corner and click the "Folders" bar. You may need to click on the + next to the folders on the left pane of your screen in order to see all of the available documents:
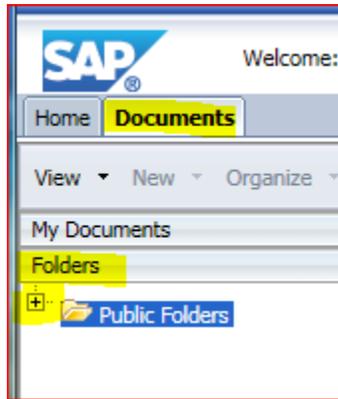
9. Once you have expanded all of your folders, you should see something similar to the following:
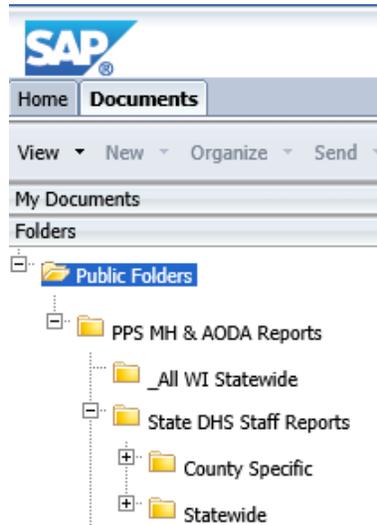
10. If you are interested in accessing aggregate, statewide data, you will use the **Statewide** folder. If you are interested in accessing data for a particular county, you will use the **County Specific** folder. Each of these folders contains the same reports—the only difference is whether you want to see data for one county or for the entire state. Click on one of the folders to access its reports. Each folder contains the following four categories of reports: Consumer Profiles, Data Quality, Outcomes, and Service Utilization. To access the reports in any one of these categories, simply click on the folder and a list of the available reports will be shown in the right pane. The following set of instructions will show you how to run a statewide report, and the instructions after that will show you how to run a county-specific report—**these two processes are different.**

Running a Statewide Report

11. For demonstration purposes, this guide will show you how to run a Consumer Profile report, but you can repeat this process with any of the other reports. Click on the **PPS MH & AODA Reports > State DHS Staff Reports > Statewide > Consumer Profiles** folder to open it:
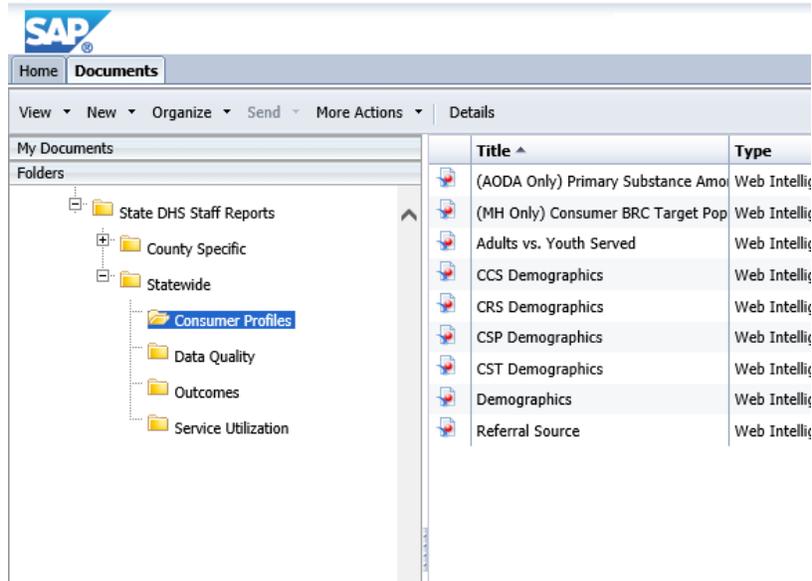
12. Now that you are within the folder, you can chose the report that you would like to run listed on the right side of your screen. This guide will use the **Adults vs. Youth Served** report for demonstration purposes, but repeat this process for any other report that you are interested in. **Right-Click** on the report that you would like to run. You will see the following drop-down menu:
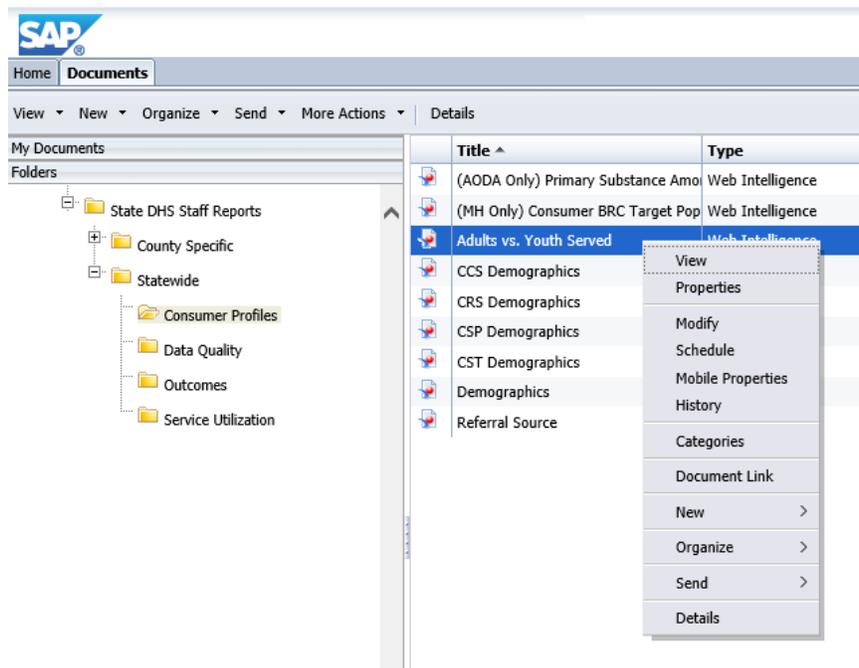
13. Select **Schedule**:
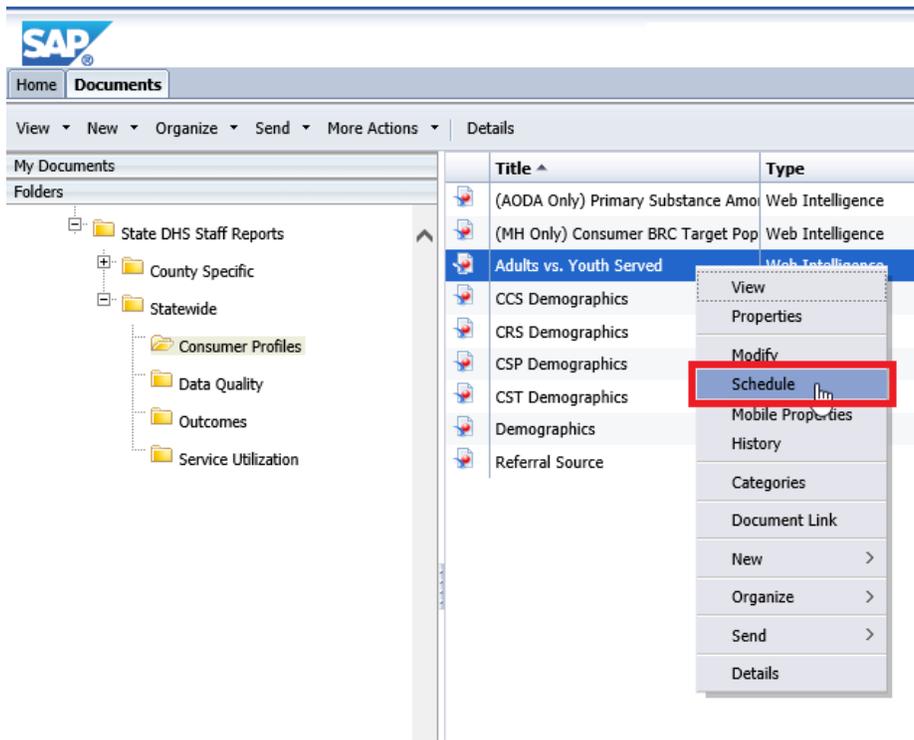
14. You will be taken to the report scheduling screen. You do not need to change any of the options on this page, simply click **Schedule** in the lower right-hand corner:
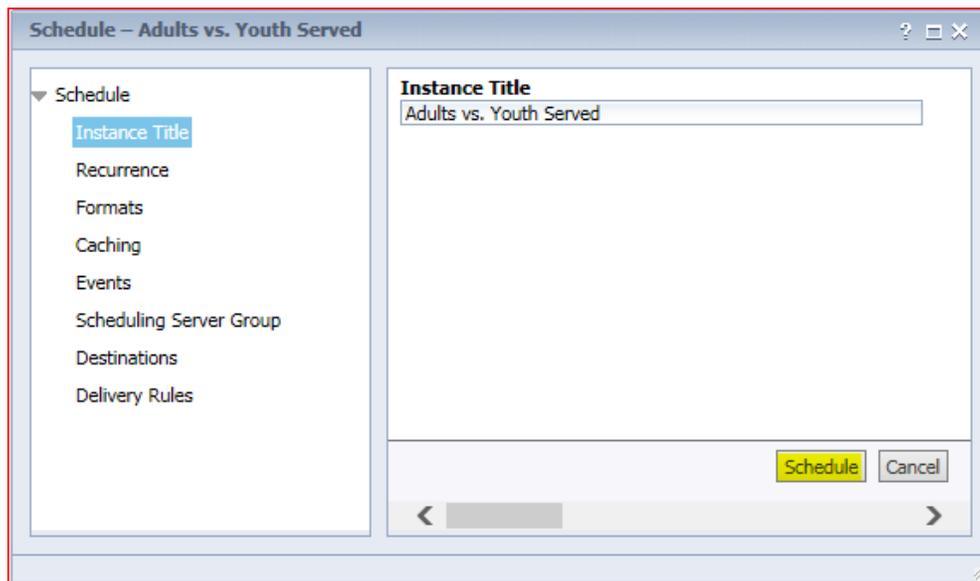
15. After you have scheduled the report to run, you will be taken to a page showing the run history of your report. If the report has been run previously, you will be able to access previously run reports here as well.

16. Initially, your report will have a status of "Running." The status will auto Refresh every few seconds:

17. When your report is complete, the status of the report will say "Success." Click on the **Instance Time** column to view your report (or if you'd like to view older reports, click on their Instance Time):

18. Now you should see the content of the report. For some reports, there are tabs on the bottom that allow you to toggle between substance use and mental health information. For some reports which have either "AODA Only" or "MH Only" in their title, this option is not be available:
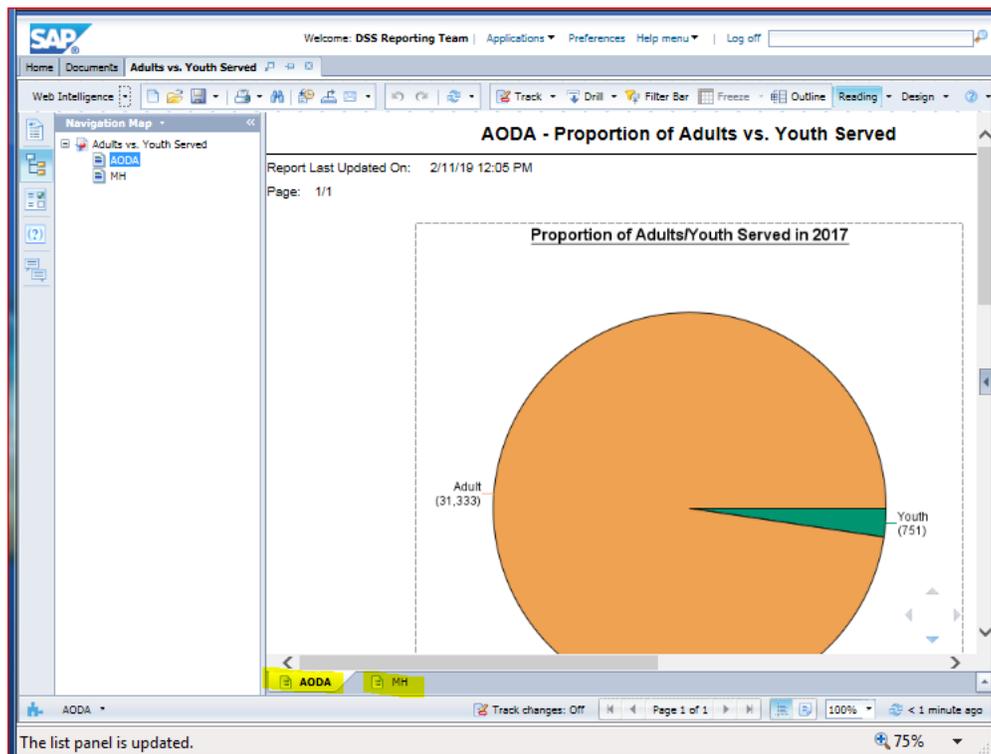
Running a County-Specific Report

1. Click on the **County-Specific** folder, and click on the type of report you would like to run. For demonstration purposes, this guide will use a **Consumer Profile** report, but you can repeat this process for any other type of report.

2. Right-click on the report that you would like to run and select **Schedule** from the drop-down menu:
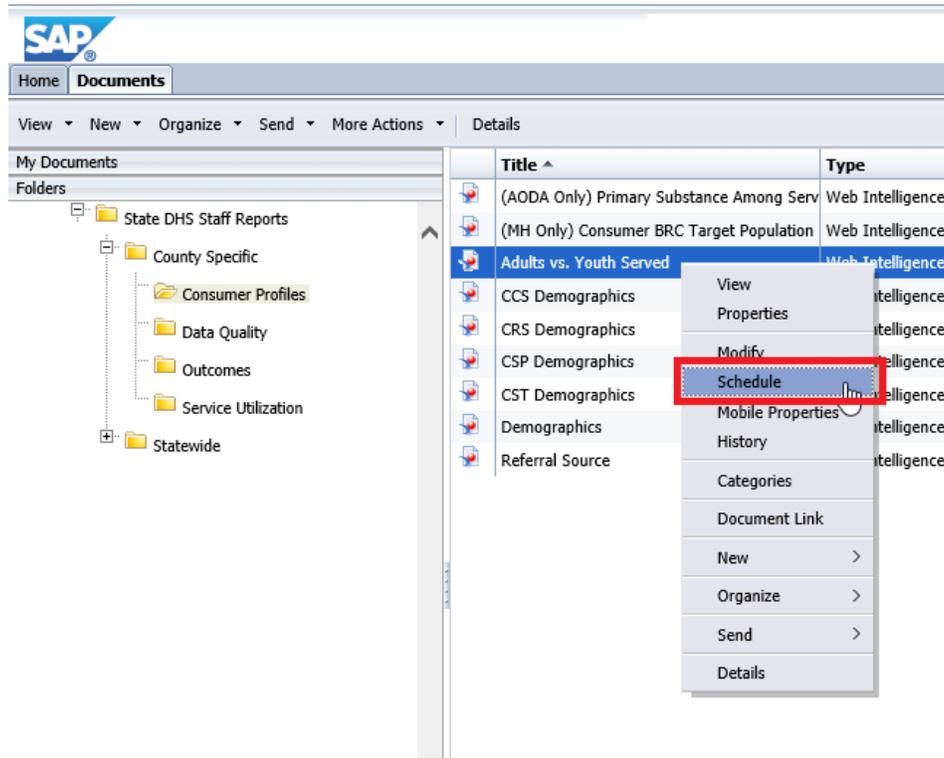
3. You will be brought to the scheduling page. From the pane on the left-hand side, select **Prompts.** Then in the right pane, click the **Modify** button:
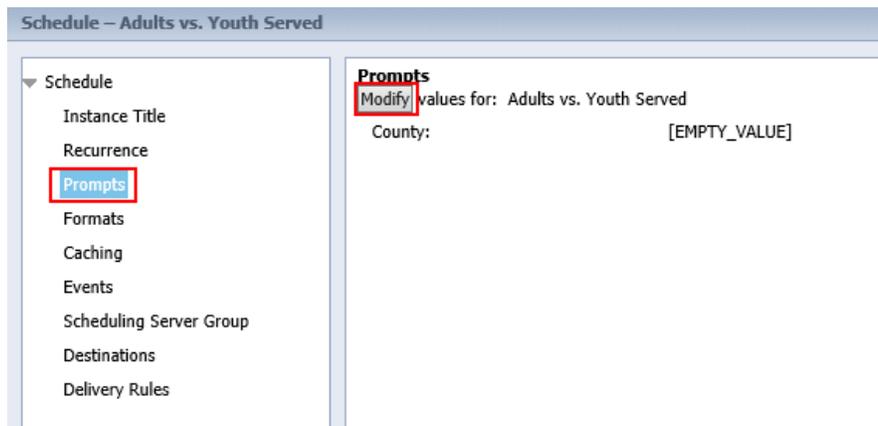
4. The pop-up box here will allow you to select the county whose data you are interested in viewing. If the report has been run before, the previous county will still be in the query. Click on the **left arrow** to clear out the previous value:
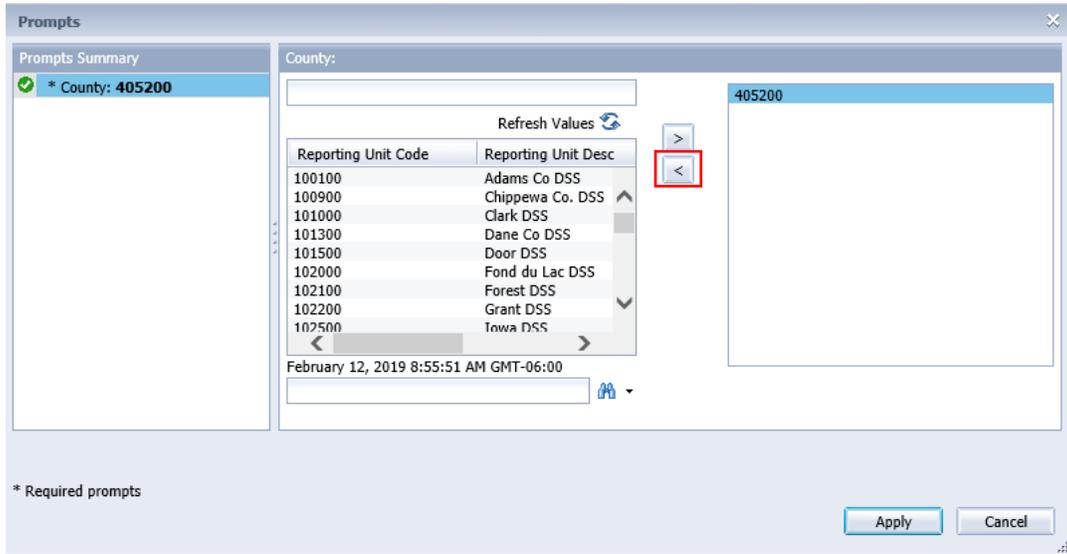
5. In the bottom box next to the binoculars, enter the code of the county. The appendix includes the county codes that you should use. The results of your search will show up in the window above:
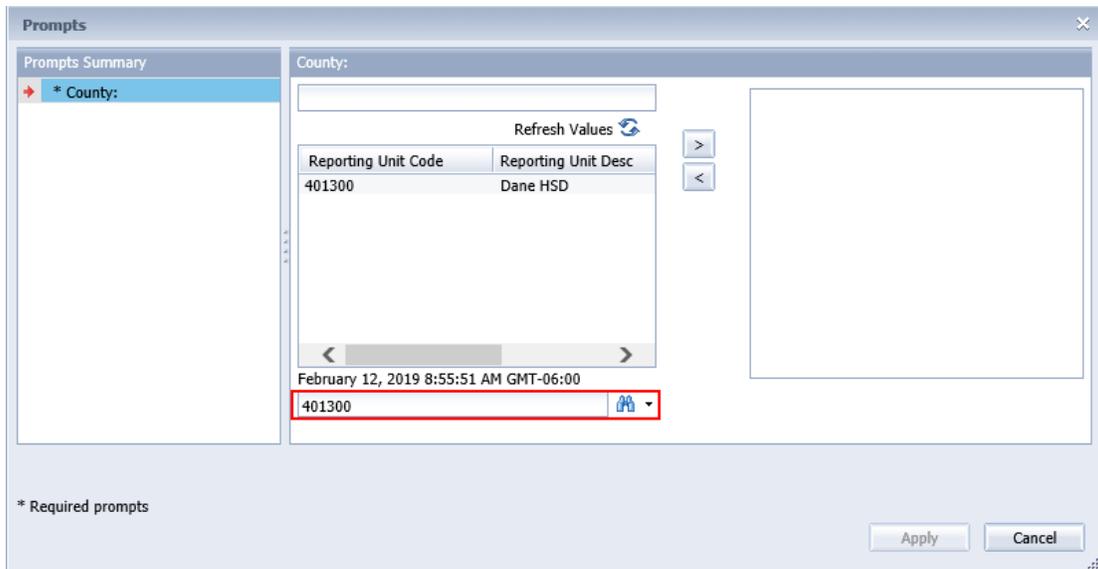
6. Select the county and click the **right arrow** to add the county into the query:
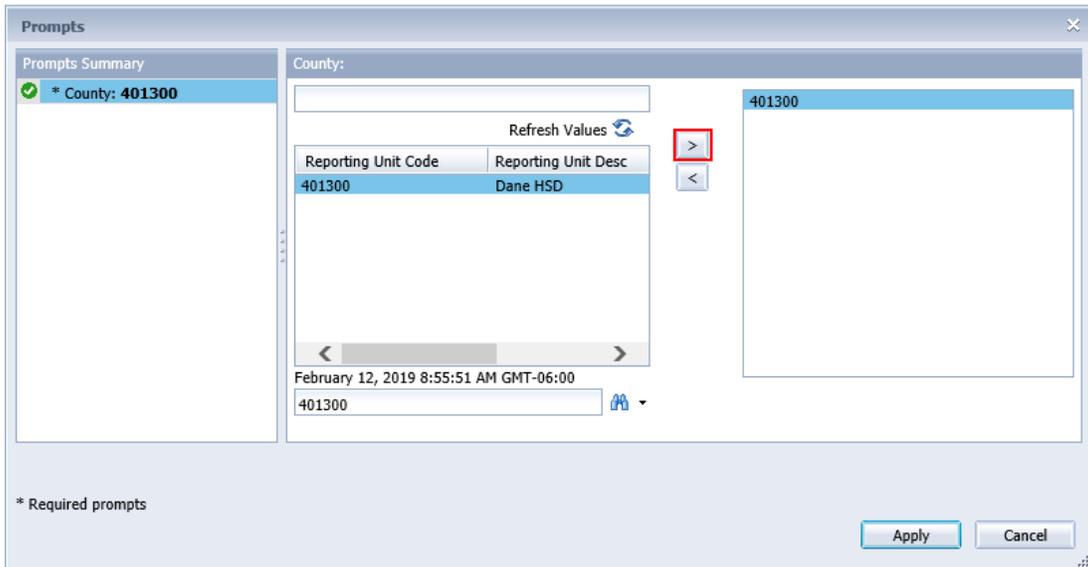
7. Once you have filled in all of the queries, you can click on the **Apply** button in the lower right-hand corner:
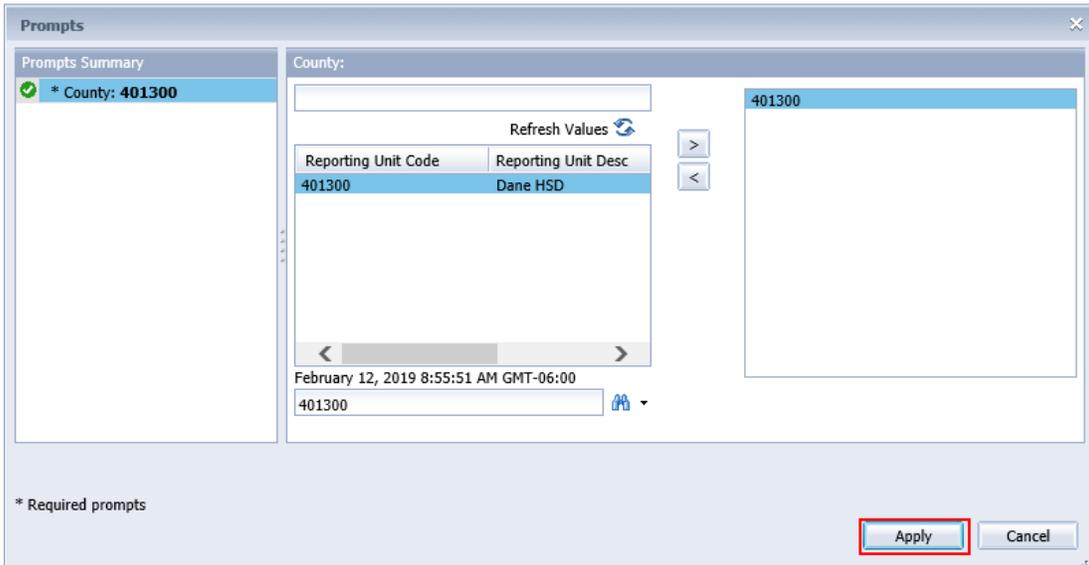
8. Click **Schedule** in the lower right-hand corner of the window and continue running the report in the same way you did for the Statewide report. For a reminder of how to finish running the report, go back to step 15 in the previous section.

Saving a Report

Once you have accessed a report following the previous steps, you may choose to save the report that you have viewed. The following will show you how to do this.

1. In the upper-left corner of the screen, click the **Export** icon > click **OK**:
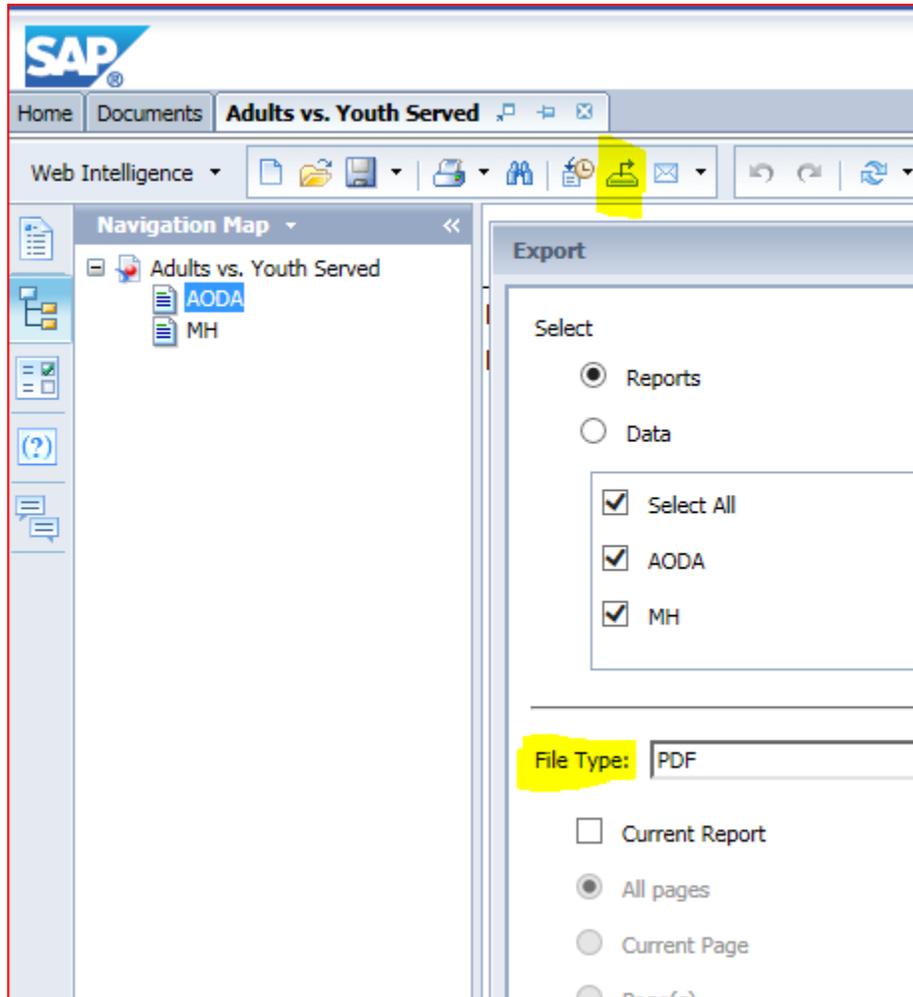
2. Depending on which Internet browser you're using, the steps here may vary, but you can save the report following the steps that you would typically follow to save a downloaded document.

Where to Get Help

For questions related to your ForwardHealth logins or any errors that you are experiencing, please contact the ForwardHealth Portal Help Desk:

Email: vedswiedi@wisconsin.gov
Phone: 1-866-908-1363

Appendix

Code	County
400100	Adams HSD
400200	Ashland HSD
400300	Barron HSD
400400	Bayfield HSD
400500	Brown HSD
400600*	Buffalo HSD
400700	Burnett HSD
400800	Calumet HSD
400900*	Chippewa HSD
201000	Clark DCP
401100	Columbia HSD
401200	Crawford HSD
401300	Dane HSD
401400	Dodge HSD
201500	Door DCP
401600	Douglas HSD
401700	Dunn HSD
401800	Eau Claire HSD
401900	Florence HSD
202000	Fond du Lac DCP
202200	Grant and Iowa DCP
402300	Green HSD
402400	Green Lake HSD
202100	Human Service Center (Forest/Oneida/Vilas)
402600	Iron HSD
402700	Jackson HSD
402800	Jefferson HSD
402900	Juneau HSD
403000	Kenosha Co. HSD
403100	Kewaunee Co. HSD
403200*	LaCrosse HSD
403300	Lafayette HSD
403600	Manitowoc HSD
403800	Marinette HSD
403900	Marquette HSD
407200	Menominee HSD
404000	Milwaukee Co. HSD
404100*	Monroe HSD

Code	County
203400	North Central Community Services (Langlade/Lincoln/Marathon)
404200	Oconto HSD
404400	Outagamie Co HSD
404500	Ozaukee HSD
404600*	Pepin HSD
404700	Pierce HSD
404800	Polk HSD
404900	Portage HSD
405000	Price HSD
405100	Racine HSD
405200	Richland HSD
405300	Rock HSD
405400	Rusk HSD
405600	Sauk HSD
405700	Sawyer HSD
205800	Shawano DCP
405900	Sheboygan HSD
405500	St Croix HSD
406000	Taylor HSD
406100	Trempealeau Co. HSD
406200	Vernon HSD
406400	Walworth HSD
406500	Washburn HSD
406600	Washington Co. HSD
406700	Waukesha HSD
406800	Waupaca HSD
406900	Waushara HSD
407000	Winnebago HSD
207100	Wood HSD
Code	**Additional CST County Agencies**
101000	Clark DSS
102100	Forest DSS
102200	Grant DSS
102500	Iowa DSS
104300	Oneida DSS
106300	Vilas DSS
Code	**Tribes**
1522	Bad River Tribe

Code	Tribes
1526	Forest County Potawatomi Community
1527	Ho Chunk Nation
1528	Lac Courte Oreilles Tribe
1515	Lac du Flambeau Tribe
1523	Menominee Tribe
1524	Oneida Tribe
1525	Red Cliff Tribe
1529	Sokaogon Chippewa Community
1530	St. Croix Chippewa Tribe
1531	Stockbridge Munsee Community
Code	**Agencies**
1558	ARCW
1613	Marshfield Clinic
1568	NorthLakes Community Clinic Iron River
1626	St. Joseph's Hospital Libertas
1559	Waukesha Community Health Center
Code	**New County Regions**
1571*	WRIC (LaCrosse/Monroe)
1570*	WRRWC (Chippewa/Buffalo/Pepin)

*If you are interested in data from these counties/regions, please consult Kathryn VerPlanck before running reports.