

Division of Care and Treatment Services

# Quick Guide to Running PPS PORTAL Reports

Disclaimer: Not for public distribution. These PPS PORTAL reports and analytics contain privileged and confidential information, including protected health information subject to federal and state privacy laws. Reports are not intended for public distribution but rather for authorized users and should only be reviewed, disseminated, or distributed according to that permitted by law.

## **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:

wisconsin.gov home	state agencies	subject directory	department of health services		
Forward	dHealth	interChange 1 Partner	3	Welcome > March 28,	2016 12:13 L
			_		Searc
The Partner site is s functionality specific income Maintenar Katie Beckett Pro FosterCare and S Managed Care on Child Support sta Wisconsin Well W Social Securty A Aging and Disabili Subrogation work Women, Infants, Wisconsin Depart MetaStar Wisconsin Division	pecifically designer to the following p nce Workers/Coordin gram staff ubsidzed Adoption v ganization Enrollmen ff mmistration (SSA) ty Resource Centers ers and Children (WIC) v and Children (WIC) v and following and the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of the top of top of the top of top of the top of the top of	d to provide up-to wartners: ators t Brokers t Brokers (ADRCs) vorkers	-date ForwardHealth information and ies (LCAs)	Login to Secure Site Username Password Go1 Co1 Logging in for the first time? Forgot your password?	

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:

💓 wisconsin.gov home	state agencies	subject directory	department of health services			
Forward	dHealth	interChange Partner			Welcon	ne ELLIE HOLZHAUSEN » March 28, 201
Home Search Certification	Partners Max Fe	e Home Account	Contact Information	Online Handbooks	Site Map i	C Functionality User Guides
You are logged in as a P	Partner User					Sea
Messages					3	Quick Links
*** No rows found	***					Online Handbooks     ForwardHealth Updates
						Max Fee Schedules
						Partner Links
						• Business Objects WebI
						Partner Request Access
						Partner Portal User Guide
						Partner Request Search [Admin]
						<ul> <li>Partner DSS Request Search [Adu</li> </ul>

5. Click on the link "Business Objects (Link to WEBI)":

ForwardHealth Partner	Welcom
Home         Search         Partners         Max Fee Home         Account         Contact Information         Online Handbooks           Certification	Site Map   iC
You are logged in as a Partner User           Webi Home           Reporting	
The link below will take you to the Business Objects Web Intelligence reporting tool. You will need to have a login id and password to access this site.	
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:

	SAP BusinessObjects BI launch pad	
	Enter your user information, and click "Log On". If you are unsure of your account information, contact your system administrator.	
	User Name: Password: Authentication:	
	Log On Help	
If you are	experiencing issues logging into Business Objects, please click this: < <u>change p</u>	assword>

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:

SA	2	Welcome:
Home	Documents	
View	New 🕆 C	)rganize 👻
My Doc	uments	
Folders		
<b>Ē</b> . ≽	Public Folders	

9. Once you have expanded all of your folders, you should see something similar to the following:

SA		
Home	8 Documents	
View 🔻	New - Organize - Send -	
My Doci	uments	
Folders		
ė. 📂 P	Public Folders	
 	PPS MH & AODA Reports	
	🛄 _All WI Statewide	
	🗀 💼 State DHS Staff Reports	
	🛨 💼 County Specific	
	🙂 💴 Statewide	

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:

Now - New - Operation - Could - Marc	A					_
My Documents	Actions +	De	Title 🔺		Туре	_
olders		-	(AODA Only) Primary Substa	nce Amo	Web Intelligen	ce
🚊 💼 State DHS Staff Reports	~	<b>.</b>	(MH Only) Consumer BRC Ta	rget Pop	Web Intelligen	ce
🛨 🚞 County Specific		-	Adults vs. Youth Served		Wob Intolligon	
🖃 🧮 Statewide		-	CCS Demographics	View	v 	
		-	CRS Demographics	Prop	oerties	
Consumer Promes		<b>.</b>	CSP Demographics	Mod	ifv	
Data Quality		-	CST Demographics	Sche	edule [hn	
Outcomes		-	Demographics	MoD	ne Properties	
Service Utilization		-	Referral Source	Theorem	ory	
				Cate	egories	
				Doci	ument Link	
	3			New		>
	4 4 4			Orga	anize >	>
				Send	d >	>
				Deta	ails	

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:

Schedule – Adults vs. Youth Served	? = ×
<ul> <li>Schedule</li> <li>Instance Title</li> <li>Recurrence</li> <li>Formats</li> <li>Caching</li> <li>Events</li> <li>Scheduling Server Group</li> <li>Destinations</li> <li>Delivery Rules</li> </ul>	Instance Title         Adults vs. Youth Served         Schedule
	< >>

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:

History – Adults vs. Youth Served							
View *   Organize *   Send *   More Actions *							
						2	M
Instance Time 🔻	Title	Status	Created By	Туре	Parameters		
Feb 11, 2019 12:10 PM	Adults vs. Youth Served	Running	DSS Reporting Team	Web Intelligence			
	Image: second	tory - Adults vs. Youth Served         ew *       Organize *       Send *       More Actions *         Image: Served tory - Adults vs. Youth Served         Instance Time *       Title         Feb 11, 2019 12:10 PM       Adults vs. Youth Served	tory - Adults vs. Youth Served         iew *       Organize *       Send *       More Actions *         Image: Served for the served served served       Image: Served ser	tory - Adults vs. Youth Served         ew *       Organize *       Send *       More Actions *         Image: Served for the served served served       Image: Served serv	tory - Adults vs. Youth Served         ew *       Organize *       Send *       More Actions *         Image: Served tory - Adults vs. Youth Served       Status       Created By       Type         Image: Served tory - Adults vs. Youth Served       Running       DSS Reporting Team       Web Intelligence	tory - Adults vs. Youth Served         iew *       Organize *       Send *       More Actions *         Image: Send *       More Actions *         Image: Send *       Title       Status       Created By       Type       Parameters         Image: Send *       Title       Status       Created By       Type       Parameters         Feb 11, 2019 12:10 PM       Adults vs. Youth Served       Running       DSS Reporting Team       Web Intelligence	tory - Adults vs. Youth Served         ew *       Organize *       Send *       More Actions *         Image: Send *       More Actions *       Image: Send *       More Actions *         Image: Send *       Title       Status       Created By       Type       Parameters         Image: Send *       Title       Status       Created By       Type       Parameters         Feb 11, 2019 12:10 PM       Adults vs. Youth Served       Running       DSS Reporting Team       Web Intelligence

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):

Histo	History – Adults vs. Youth Served								
View	View   View								
EP									
	Instance Time 🔻	Title	Status	Created By	Туре	Parameters			
- 19	Feb 11, 2019 12:11 PM	Adults vs. Youth Served	Success	DSS Reporting Team	Web Intelligence				

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:

Schedule – Adults vs. Youth Served	
Schedule Instance Title Recurrence Prompts Formats Caching Fueste	Promots Modify values for: Adults vs. Youth Served County: [EMPTY_VALUE]
Scheduling Server Group Destinations Delivery Rules	

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:

Prompts						×
Prompts Summary	County:					
County: <b>405200</b>	Reporting Unit Code           100100           100900           101300           101500           102000           102200           102200           102500                 February 12, 2019 8:55:5:	Refresh Values S         Reporting Unit Code       Reporting Unit Desc         100100       Adams Co DSS         100900       Chippewa Co. DSS         101000       Clark DSS         101300       Dane Co DSS         101500       Door DSS         102000       Fond du Lac DSS         102100       Forest DSS         102200       Grant DSS         102500       Iowa DSS			405200	
* Required prompts		(#)	•	(	Apply	Cancel

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:

Prompts	×
Prompts Summary	County:
◆ * County:	Refresh Values S Reporting Unit Code Reporting Unit Desc 401300 Dane HSD
	C         >           February 12, 2019 8:55:51 AM GMT-06:00         AM •           401300         AM •
* Required prompts	Apply Cancel

6. Select the county and click the **right arrow** to add the county into the query:

Prompts		×
Prompts Summary	County:	
County: 401300	Refresh Values       >         Reporting Unit Code       Reporting Unit Desc         401300       Dane HSD             February 12, 2019 8:55:51 AM GMT-06:00         401300       A	
* Required prompts	Apply Cancel	

7. Once you have filled in all of the queries, you can click on the **Apply** button in the lower right-hand corner:

Prompts		×
Prompts Summary	County:	
County: 401300	Refresh Values     Reporting Unit Code   Reporting Unit Desc   401300     >     *     #01300     *     #01300     *     #01300     *     #01300     * </th <th></th>	
* Required prompts	Apply Cancel	<b>.</b>

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**:

SAP				
Home Documents Adults vs. Youth Served	<b>₽</b> # 8			
Web Intelligence 🔻 🗋 🧭 🔚 🖣 🍊 🕶 🏦 🖄 🐨 🍽 👘 🍋 🔹				
Navigation Map - «	Event			
💻 🖃 👰 Adults vs. Youth Served	Export			
	I Select			
	Reports			
(?)	🔿 Data			
	Select All			
	AODA			
	🗹 мн			
	File Type: PDF			
	Current Report			
	All pages			
	Current Page			
	Dece(a)			

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: <u>vedswiedi@wisconsin.gov</u> 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
	Human Service Center
202100	(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
	North Central Community Services
203400	(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 <u>Kathryn VerPlanck</u> before running reports.