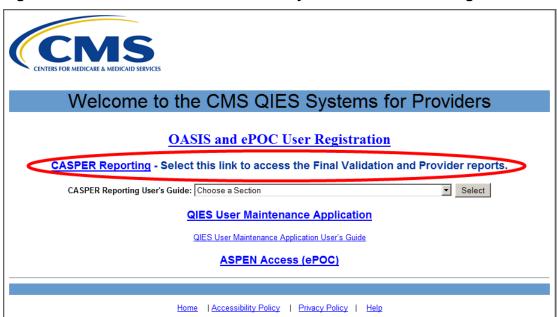
2

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ACCESSING THE CASPER REPORTING APPLICATION

Home Health Agency (HHA) providers, including corporate and third-party users, access the CASPER Reporting application from their **Welcome to the CMS QIES Systems for Providers** page (Figure 2-1) by selecting the <u>CASPER Reporting</u> link.





<u>Login</u>

Selecting the <u>CASPER Reporting</u> link from the preceding website connects you to the **QIES National System Login** page for CASPER Reporting (Figure 2-2).

rigure 2-2. Qie National Oystein Eogin i age foi OAOI EN Reportin	Figure 2-2.	QIE National System Login Page for CASPER Reporting
---	-------------	---

QIES National System Login
Welcome to CASPER Reporting Please enter your User ID and Password User ID: Password: Login
Unable to login? Go to the QIES User Maintenance application to reset your User ID/Password.

FUNCTIONALITY 2-2

Enter your User ID and Password in the appropriate fields, select the **Login** button, and respond appropriately to any security advisories.

The **CASPER Topics** (Home) page displays (Figure 2-3).

Figure 2-3. CASPER Topics Page – Home Page Pane

Skip navigation links Skip to Content	
CASPER Topics	Logout Folders MyLibrary Reports Queue Options Maint Home
Topics	Home Page
Home Page Merge PDF Feature	Welcome to CASPER
LE Active X Plug-in	Use the buttons in the toolbar above as follows:
◆ <u>Java JRE</u> [™] PSR/Jasper Report Viewer & Unzip Utility	Logout - End current session and exit the CASPER (dvqsap33) Application Folders - View your folders and the documents in them
CMS Tally Template	Reports - Select report categories and request reports Queue - List the reports that have been requested but not yet completed
	Options - Customize the report format, number of links displayed per page and report display size Maint - Perform maintenance such as creating, renaming and/or deleting folders
	Home - Return to this page
	Welcome:

The **CASPER Topics** page includes a list of related topic links in the *Topics* pane on the left. Refer to the *CASPER Topics* section of this guide for more information.

The main body of the **CASPER Topics** page is the *Home Page* pane. The *Home Page* pane includes a "Welcome to CASPER" greeting and links to the functionality available in the CASPER Reporting application. The links and descriptions of the functionality they provide are included in the *Home Page* pane:

- Logout End current session and exit the CASPER Application
- Folders View your output report folders and the documents in them
- <u>Reports</u> Select report categories and request reports
- <u>Queue</u> List the reports that have been requested but not yet completed
- <u>Options</u> Customize the report format, number of links displayed per page and report display size
- <u>Maint</u> Perform maintenance such as creating, renaming and/or deleting folders
- <u>Home</u> Return to this page

The functionality provided by these links is also available on the CASPER Reporting application toolbar that is described below.

NOTE: The graphics of the CASPER Reporting application pages in this guide depict the *ViewStyle* option *Classic*. Refer to the *Other Customizations* topic in this guide for information about changing your *ViewStyle*.

<u>Toolbar</u>

The title bar of each page of the CASPER Reporting application contains a toolbar (Figure 2-4) with which you may access the CASPER Reporting application functionality.

Figure 2-4. CASPER Reporting Application Toolbar

Logout Folders MyLibrary Reports Queue Options Maint Home

The CASPER Reporting toolbar includes the following buttons:

- Logout
- Folders
- MyLibrary
- Reports
- Queue
- Options
- Maint
- Home

You can select the buttons of the CASPER Reporting toolbar in two ways:

- With the mouse, you may click on a button to access the functionality associated with that button.
- Keyboard users may use the following shortcut keys bring focus to items on the toolbar:
 - Alt + I Logout
 - Alt + s Folders
 - Alt + y MyLibrary
 - Alt + r Reports
 - Alt + q Queue
 - Alt + o Options
 - Alt + m Maint
 - Alt + g Home

With focus on a button, press the Enter key to access the function associated with that button.

NOTE: For users utilizing assistive reading tools, <u>Skip navigation links</u> and <u>Skip to content</u> links are available, as appropriate, at the top of each page that allow you to bypass the repetitive reading of the toolbar and, if present, other navigation items on the page.

Navigating the CASPER Reporting Application

To begin using the CASPER Reporting application, select one of the buttons on the CASPER toolbar in the title bar of the **CASPER Topics** page or a descriptive link in the *Home Page* pane (Figure 2-3, above).

If you select the **Reports** button [Alt + r] from the toolbar or the <u>Reports</u> link from the *Home Page* pane, you proceed to the **CASPER Reports** page where you may request reports. If you select the **Folders** button [Alt + s] or the <u>Folders</u> link, you proceed to the **CASPER Folders** page where you may view previously requested report output.

NOTE: Do not use the browser's Back and Forward buttons. To make changes to the data or navigate between pages, use the links/buttons provided in the CASPER Reporting application.

REQUESTING REPORTS

Select the **Reports** button [Alt + r] from the CASPER toolbar to access the **CASPER Reports** page (Figure 2-5).

CASPER Reports	Lugu	ut Folders MyLibrary Reports Queue Options Maint Home
Report Categories	HHA Provider	
HA OBQI Reports HA OBQM Reports	MHA Agency List	HHA Online Agency List Report
HA Provider Jex Reports	MHA Discharges	HHA Online Discharges Report
	MHA Duplicate Patient	HHA Online Duplicate Patient Report
	MHA Error By Field By Agency	HHA Online Error By Field By Agency
	HHA Error By Month By Agency	HHA Online Error By Month By Agency
	MHA Error Message	HHA Online Error Message Report
		Pages [1] [2] [3]

Figure 2-5. CASPER Reports Page

The *Report Categories* pane on the left lists the various report categories that are available to you. Some reports are restricted to specific users/user groups. The report categories available to you may differ from those depicted in the figure above.

The pane on the right lists the reports available in the selected report category. This list may span multiple pages. Use the page number links at the bottom of the pane to navigate from one page to another.

2. To request a specific report, select the abbreviated report name displayed as a black underlined link in the right pane of the page.

The **CASPER Reports Submit** page (Figure 2-6) is presented for the selected report.

Figure 2-6. CASPER Reports Submit Page

CASPER Repo	rts Submit	Logout Folders	MyLibrary Report	s Queue Options Mai	nt Home
Report: HHA Di	scharges				
	Date Cri Begin Date(mm/dd/y End Date(mm/dd/y				
Template Folder: Template Name:	My Favorite Reports HHA Discharges		v v	Submit Save & Submit	Back Save

3.

Select the desired report criteria. If another page of criteria selections exists, select the **Next** button to proceed to it. The **Back** button returns you to the previous page. When you are finished specifying all of the desired report criteria, select the **Submit** button.

NOTE: Do not use the browser's Back and Forward buttons. To make changes to the data or navigate between pages, use the links provided in the CASPER Reporting application.

NOTE: The criteria choices presented on the **CASPER Reports Submit** pages vary depending upon the specific report requested and the level of access assigned to you.

Refer to the individual report descriptions in subsequent sections of the CASPER Reporting HHA Provider User's Guide for report-specific criteria.

Following a report submission request, you receive verification that it was placed into the queue for processing (Figure 2-7).

Figure 2-7. CASPER Reports Submit Verification Page

CASPER Reports Submit	Logout Folders MyLibrary Reports Queue Options Maint Home	-
Queueing Report QID:7283907 Name:HHA Agency List for user Completed reports will appear in your inbox on the Folders page.		
	Back Folders Reports	-

4 If desired, select the **Queue** button [Alt + q] from the CASPER toolbar to view the status of a requested report. The **CASPER Report Queue** page (Figure 2-8) is presented.

Figure 2-8. CASPER Reports Queue Page

CASPER Report Queue Options Maint Home			Options Maint Home	<u> </u>		
	Processing 0 of 1 Reports					
	Position	Queue ID	Report Name	Status	Duration	
	Queue 1 of 1	7283908	HHA Agency List	Requested		l
					Back Refresh	

The **CASPER Report Queue** page provides detailed information including the report's position in the queue, the corresponding Queue ID, the name of the requested report, the processing status, and the duration (or time) the report has spent processing.

Processing # of # Reports tells you how many reports are currently being processed for all users in the nation. *Position* tells you where the report you submitted is in the queue. For example, if the *Position* is 2 of 3, this indicates that your report is next to be processed out of the 3 requests submitted nationwide.

5. Select the **Refresh** button to refresh the **CASPER Report Queue** page so that you can monitor the progress of your report. When your report is no longer listed on the **CASPER Report Queue** page it is done processing.

NOTE: The length of time it takes to generate a report varies. You may consider logging off after requesting reports, and returning to the reporting system at a later time to retrieve them. However, some reports may process so quickly that they are delivered to your inbox before you can view them on the **CASPER Report Queue** page.

6. The completed report is delivered to the default folder, *My Inbox*. Select the **Folders** button [Alt + s] to access your *My Inbox* folder. Refer to the *Viewing, Printing, Saving And Exporting Reports* section of this document for more information.

To request another report, select the **Reports** button [Alt + r] to return to the listing of reports.

The **Back** button [Alt + b] on the **CASPER Report Queue** page returns you to the previous page you were viewing.

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SAVING REPORT CRITERIA

The CASPER Reporting application includes functionality that allows you to save the criteria you selected for a report so that you may run it at a later time without selecting all of the criteria again.

The last **CASPER Reports Submit** criteria page (Figure 2-9) for each report provides *Template Folder* and *Template Name* fields as well as **Save** and **Save & Submit** buttons for the purpose of saving the report criteria you selected.

Figure 2-9. CASPER Reports Submit Page

CASPER Reports	Submit	Logout Folder	s MyLibrary Rep	orts Queue Options Main	nt Home
Report: HHA Disc	harges				
	Begin Date(mn	te Criteria: Prior Month n/dd/yyyyy): 06/01/2007 n/dd/yyyyy): 06/30/2007			
	ly Favorite Reports HA Discharges		T T	Submit Save & Submit	Back Save

1 To save report criteria, select the desired criteria options, advancing as necessary through all of the **CASPER Reports Submit** criteria pages.

On the last **CASPER Reports Submit** criteria page, the generic name of the report you selected is defaulted into the *Template Name* field. You may save your report criteria template with this name, select another template name from the drop-down list, or create a new template name by typing it in the *Template Name* field.

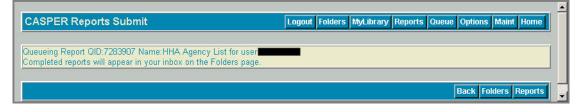
NOTE: If you select an existing template name from the drop-down list, the criteria previously saved in that template are replaced with the current criteria selections.

In the *Template Folder* field, *My Favorite Reports* is the defaulted folder name. You may save your template into this folder or create a new folder by typing the new folder name in the *Template Folder* field.

NOTE: The *My Favorite Reports* folder does not actually exist until you save a template to it. If you choose to save a template to the *My Favorite Reports* folder, it is created for you when you save the template.

- 2. Select or enter a name for your report criteria template in the *Template Name* field and a folder in which to save the template in the *Template Folder* field.
- **3.** To run the report AND save the criteria for future use, select the **Save & Submit** button. The system responds with verification that the report was placed into the queue for processing (Figure 2-10). The template is saved into the folder you specified.

Figure 2-10. CASPER Reports Submit Verification Page



4. If you wish only to save the report criteria for future use, select the **Save** button. The system responds with verification that the report criteria template was saved into the folder you specified (Figure 2-11).

Figure 2-11. CASPER Reports Submit Verification Page – Template Saved



RUNNING AND MAINTAINING SAVED CRITERIA TEMPLATES

To view, run or maintain a report criteria template you saved, select the **MyLibrary** button [Alt + y] on the CASPER toolbar. The **CASPER My Library** page (Figure 2-12) is presented.

CASPER My Library		Logout	Folders MyLibrary Reports	Gigge Queue Options Ma	aint Home
🖰 My Library(s)		My Favorite Reports			
My Favorite Reports	Info:	Click Link to Run The Template	Date Created	Date Last Run≆	Select∓
Quarterly Reports	8	HHA Discharges	09/20/2007	09/20/2007 10:22	
	B	OBQM Report 3 Col Package	07/20/2007	07/20/2007 14:57	
			Pages [1]		
				SelectAll ReRun Mo	we Delete

Figure 2-12. CASPER My Library Page

Your report criteria template folders are listed in the *My Library(s)* pane of the **CASPER My Library** page. The saved report criteria templates that are stored in the selected (highlighted) template folder are listed in the right pane of the page.

Viewing and Modifying Saved Criteria Templates

The saved report criteria template names listed in the right pane of the **CASPER My Library** page are links with which you may view the report criteria options saved in a template.

Select the report criteria template name link to view the **CASPER Reports Submit** criteria page(s) with the criteria options you previously saved. Review or modify the criteria as needed, using the **Next** button to advance through multiple pages, if applicable. You may save the template and/or submit the report from the final **CASPER Reports Submit** criteria page. To view a synopsis of the saved criteria, with your mouse, point to and hover over the report icon in the Info column to the left of the template name. A **Report Arguments** pop-up box (Figure 2-13) containing the details of the saved criteria is presented.

CASPER My Library		Logout Folders MyLibrary Repor	ts Queue Options Ma	aint Home
My Library(s)	My Favorite Reports			
My Favorite Reports	Info Click Link to Run The	Template∓ Date Created∓	Date Last Run∓	Select-
Quarterly Reports	HHA Discharges	09/20/2007	09/20/2007 10:22	
	OBQM Report 3 Col Pac	kage 07/20/2007	07/20/2007 14:57	
	Report Arguments Patient Listing Branch Report Case Mix 3 Branch Report			
	AEO-Graph 3 Branch Report Prior Begin Date:09/2006			
	Prior End Date:11/2006 Begin Date:12/2006 End Date:02/2007			
	Branch:N			
			SelectAll ReRun Mo	ive Delete

Figure 2-13. Template Info – Report Arguments

When you click the Info icon, the **CASPER Document Info** page (Figure 2-14) is presented for the associated template. This page displays the saved criteria selections in addition to the date the template was created and the date it was last run. If needed, use your browser's print function to print this page.

Figure 2-14.	CASPER Document Info Page
--------------	----------------------------------

CASPER Document Info	Logout Folders MyLibrary Reports Queue Options Maint Home
Template Information	
Template Name:	OBQM Report 3 Col Package
Last Run: (07/20/2007 14:57:23
Date Created:	07/20/2007 14:57:23
Arguments/Description:	Patient Listing Branch Report Case Mix 3 Branch Report AEO-Graph 3 Branch Report Prior Begin Date:01/2006 Prior End Date:11/2006 Begin Date:12/2007 Branch:N
	Return

Running Reports From Saved Criteria Templates

To run one or more reports without first viewing or modifying the saved criteria, check the *Select* box(es) to the far right of the desired template(s) and select the **Rerun** button on the **CASPER My Library** page (Figure 2-12). All selected reports are placed into the queue for processing.

NOTE: Use the **SelectAll** button to place checks in the *Select* boxes for all of the report criteria templates in the selected folder. The **SelectAll** button then changes to an **UnSelectAll** button with which you may remove all checks in the *Select* boxes.

Moving Saved Criteria Templates

To move one or more templates in the selected template folder to another template folder, check the *Select* box(es) to the far right of the desired template(s) and select the **Move** button on the **CASPER My Library** page (Figure 2-12, above). The **CASPER Template Move** page (Figure 2-15) presents a list of the report(s) you selected.

Figure 2-15. CASPER Template Move Page

CASPER Template Move	Logout Folders MyLibrary Reports Que	eue Options Maint Home
Move From: My Favorite Reports	Template Name	Template Created
To: My Favorite Reports 💌	OBQM Report 3 Col Package	07/20/2007 14:57:23
		Back Save Next

Open the *To* drop-down list and highlight the template folder to which you wish to move the selected template(s). Select the **Save** button.

From the **CASPER Template Move** page, you may also change a template name. Select a template displayed under the *Template Name* heading and type a new name.

When all changes are complete, select the **Save** button to retain the change.

Deleting Saved Criteria Templates

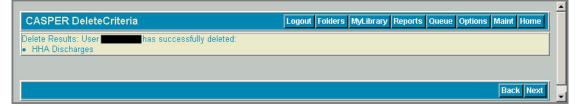
To delete one or more report criteria templates, check the *Select* box(es) to the far right of the desired template(s) and select the **Delete** button on the **CASPER My Library** page (Figure 2-12, above). A delete confirmation dialog box (Figure 2-16) is presented.



Microsoft Inter	net Explorer 🛛 🗙
2 Delete	e the checked files?
	ene checked hies:
ОК	Cancel

Select the **OK** button to confirm the delete request. The **CASPER DeleteCriteria** page (Figure 2-17) is presented indicating the template(s) you successfully deleted.

Figure 2-17. CASPER DeleteCriteria Page



NOTE: Upon deletion of all saved report criteria templates from a template folder, the system automatically deletes the template folder.

PACKAGE REPORTS

Several report categories provide "Package" report listings that allow you to request multiple reports with a single submission. An example, the OASIS-C Quality Improvement reports category, is depicted in Figure 2-18.



Figure 2-18. CASPER Reports Page – Package Report

NOTE: When submitting requests containing multiple reports and/or facilities, expect the total processing time to increase. Please limit the number of reports you submit to a reasonable number.

When a package is selected, the name of each report included in the package is presented (Figure 2-19) on the first criteria page. One or more reports are selected (checked) by default. Check and/or uncheck reports as necessary to select only those reports you need.

Figure 2-19. CASPER Reports Package

CASPER Repo	rts Submit	Logout Folders MyLibrary R	eports Queue Options Maint Home
Report: Quality	Improvement 2 Col Package		
	Repo	Process Measure 2 □ Process Measures 2 - Text □ Agency Patient-Related Chara	actoristics 2
		☑ Outcome Risk Adjusted 2 ☑ Outcome Risk Adjusted 2 - Te	ext
	Durin D	Potentially Avoidable Event Ri Potentially Avoidable Event Ri Potentially Avoidable Event Pa	isk Adjusted 2 - Text
		ate: 10/2010 - ate: 09/2011 -	
	Report By Bran		
Template Folder:	My Favorite Reports	V	Submit Back
Template Name:	Quality Improvement 2 Col Package	T	Save & Submit Save

Specify the additional criteria on this and any subsequent criteria pages, and select the **Submit** button. Each report is then individually sent to the queue, processed, and delivered to your Inbox.

SHARED FOLDERS

Shared folders are "read-only" folders into which automatically-generated reports are distributed for your agency. One shared folder exists for and is visible to each provider. You may view the shared folder and the reports that it contains, but cannot alter, modify, delete, move, or rename these items.

Select the **Folders** button [Alt + s] from the CASPER toolbar to access the **CASPER Folders** page (Figure 2-20) and view the shared folders that are available to you.

CASPER Folders		Logout Folders MyLibra	ary Reports Queue Options Ma	aint Home
T Folders	* IA HHA IAHHA290			
My Inbox	Info Click Link to View Rep	ort∓	Date Requested∓	Select∓
* IA HHA IAHHA290	Public Reporting Preview		03/16/2007 11:06:13	
	Public Reporting Preview		11/20/2006 15:14:31	
		Pages [1]		
		Fages [1]		
	This Folder is Read-Only		SelectAll Print PSRs Zip	MergePDFs

Figure 2-20. CASPER Folders page - Shared Folder

NOTE: Shared folders are identified with an asterisk (*) on the **CASPER Folders** page. A shared folder's name begins with a two-letter state abbreviation.

Provider-level users only see a shared folder for their agency; they cannot see or access shared folders for other agencies. Corporate and third-party users see shared folders only for the agencies for which they submit assessments. State Agency and QIO users may see all shared folders associated with their state(s). CMS users may see shared folders for every agency in the nation.

CMS, QIO, and State Agency Shared Folders Access

Because of the number of shared folders that are available to CMS, QIO, State Agency, corporate, and third-party users, a Search feature was implemented so that the specific provider folders of interest may be located and flagged for viewing. Shared folders are not visible on the **CASPER Folders** page by default to these users; those of interest must first be identified.

1 To search for a specific provider's shared folder, select the **Maint** button [Alt + m] on the CASPER toolbar. The **CASPER Maintenance** page (Figure 2-21) is presented.

CASPER Maintenance	Logout Folders MyLibrary Reports Queue Options Maint Home
Select Folder Type: Visible Folders 💌 Select	
Select Folder Type: Visible Folders Select	
Folder Shared Hide Delete Name Folder Folder Folder	
My Inbox	
a La Falder Neme Centeire	Irch HideAll Insert Save Return
Search: Folder Name Contains Sea	HideAli Insert Save Return

Figure 2-21. CASPER Maintenance Page

- **2.** From the Select Folder Type field drop-down list, select the Hidden Folders option and then select the **Select** button.
- **3.** From the Search drop-down list, indicate the type of search criteria you are supplying: Folder Name Contains, Provider Name, or Provider Number. Enter you search criteria text in the text box provided and select the **Search** button [Alt + k]. A list of the folders matching your search criteria is presented on the **CASPER Shared Folder Search** page (Figure 2-22).

Figure 2-22. CASPER Shared Folder Search Page



For example, a CMS user may wish to perform a search using *Folder Name Contains* with an entry of *IA*. The results of this search returns all shared folders for the state of Iowa.

NOTE: When entering search criteria, upper or lower case characters may be used. In order to narrow your results, be as specific as possible when searching for shared folders.

- **4** To specify the folders you wish to display on the **CASPER Folders** page, check the box under the *Visible?* heading corresponding to the provider folder(s), or select the **Show All** button to automatically check the box for every provider folders listed (Figure 2-27, above). Selecting the **Hide All** button removes all checkmarks.
- **5.** After checking the desired boxes on the **CASPER Shared Folder Search** page, select **Save** to retain this setting.

Shared folders that are set as "visible" are presented on the **CASPER Maintenance** page as shown in Figure 2-23.

Figure 2-23. CASPER Maintenance Page – Visible Shared Folder

ice	Logout Fold	ers MyLibrary Reports Queue Option	ons Maint Home
E LI E LOTAL			
e Folders V Select			
Shared Hide Delete			
~			
 Image: A set of the set of the			
<i></i>			
untains -	Search	HideAll Insert	Save Return
	Search		Save Return
	e Folders Select Shared Hide Delete Folder Folder	a Folders Select	E Folders Select

NOTE: The Hide Folder feature is available only to certain users. To hide unwanted folders, place a checkmark in the box under the *Hide Folder* heading associated with the folder(s) you wish to hide or select the **HideAll** button [Alt + j] to hide all of the folders listed. Select the **Save** button to retain these settings.

NOTE: Only System Administrators may delete shared folders.

VIEWING, PRINTING, AND SAVING INDIVIDUAL REPORTS

1 To view a completed report, select the **Folders** button [Alt + s] on the CASPER toolbar. The **CASPER Folders** page (Figure 2-24) s presented. By default, the *My Inbox* folder is selected. Reports that you request are placed in your *My Inbox* folder. Select another folder if necessary. Links to the reports stored in the selected folder are listed in the right-hand pane of the page.

CASPER Folders			Logout Folders	MyLibrary Rep	orts Queue Options M	aint Home
Folders		My Inbox				
My Inbox	Info"	Click Link to View Repo	rt∓		Date Requested∓	Select-
IA HHA IAHHA290	∕	<u>HHA Error Message</u>			09/20/2007 11:44:23	
		HHA Discharges			09/20/2007 10:20:01	
		HHA Agency List			09/20/2007 10:13:01	
		HHA Agency List			09/20/2007 10:07:45	
		Report Template Listing			07/20/2007 14:57:41	
		Report Locator Listing			07/20/2007 14:49:15	
			Pag	es [1]		
			S	electAll Print P	SRs Zip MergePDFs M	ove Delete

Figure 2-24. CASPER Folders Page – My Inbox

When you hover the mouse pointer over a report icon in the Info column in the right-hand pane of the page, details of the criteria selected to generate the report appear briefly (Figure 2-25).

Figure 2-25. CASPER Folders Page – Report Criteria Summary

CASPER Folders	Logout Folders M	yLibrary Reports Queue Options Ma	aint Home
Folders	My Inbox		
My Inbox	Info Click Link to View Report	Date Requested∓	Select∓
<u>* IA HHA IAHHA290</u>	HHA Discharges	09/20/2007 10:20:01	
	Begin Date:04/01/2007 St 50 End Date:06/30/2007	09/20/2007 10:13:01	
	st	09/20/2007 10:07:45	
	Report Template Listing	07/20/2007 14:57:41	
	Report Locator Listing	07/20/2007 14:49:15	
	Pages	[1]	
	Sele	ctAll Print PSRs Zip MergePDFs Mo	we Delete

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NOTE: Use the report criteria information to identify the specific report you wish to view from a list of similar reports.

When you select a report Info icon, the **CASPER Document Info** page (Figure 2-26) is presented for the associated report. This page displays the criteria selections used to generate the report in addition to other characteristics of the report document.

SPER Document Info		Logout Folders MyLibrary Reports Queue Options Maint Home
ocument Information		
	Document Name:	HHA Discharges
	Mime Type:	application/pdf
	Document Type:	Adobe PDF
	Document Size:	4.07k
	Requested:	09/20/2007 10:20:01
	Process Started:	09/20/2007 10:20:05
	Completed:	09/20/2007 10:20:07
	Process Time:	2 Secs
	Total Time:	6 Secs
	Arguments/Description:	Begin Date:04/01/2007 End Date:06/30/2007

Figure 2-26. CASPER Document Info Page

2. To view the report, click the underlined report name link from the *My Inbox* folder (Figure 2-24, above).

A report generated in the PDF format (Figure 2-27) displays in your browser with the Adobe Reader plug-in.

NOTE: Other report formatting options include comma-separated values (CSV) and XLS for use with Microsoft Excel.



https://				- Wind	dows Int	ernet Ex	olorer			_	
→ ▼ Attps://				•	• • >	< 🔁 Bi	ng				۰ م
File Edit Go To Favorites Help											
Favorites 🌈 https://c					• 🔊 •		Page 🕶	Safety 🕶	Tools -	0 - •	
Run Date: 06/13/2014 Job # 18377363		Provide Active P	eport 001 r Counts Providers gional Of					Las	t Update: (Page 1	06/03/2014 of 5	-
Provider Category	CN	FN	NJ	NY	PR	VI			Region	Nation	1
HOSPITALS	0	0	97	217	59	2			375	6,160	1
DEEMED STATUS 1. DEEMED	0	0	93	195	35	2			325	4.636	
1. NON-DEEMED	ō	ō	4	22	24	ő			50	1,524	
TYPE OF HOSPITAL 1. SHORT TERM (0001-0899) A. PSYCHIATRIC UNIT (SF45=Y, SF51=0) B. REHABILITATION UNIT (SF47=Y, SF53=0) C. SWING BED HOSPITALS (SF44=Y)			1 (¹ 5	171 90 61 12	► ⁵¹ 人 3	2 0 0 0			288 123 72 12	3,498 1,130 915 507	

- **3.** To locate specific text of interest in the displayed report, perform a Find function. The Find function [Ctrl + f] is available on the Edit menu for all report formats.
- **4** To print a displayed PDF-formatted report, select the **Print** tool from the Adobe toolbar or select the *Print* option from the browser's *File* menu.
- **5.** To save a displayed PDF-formatted report to your workstation or local network, select the **Save** tool from the Adobe toolbar or select the *Save As* option from the browser's *File* menu. Specify the name and destination location of your file.

ZIPPING, PRINTING, AND SAVING MULTIPLE REPORTS

The CASPER Reporting application includes functionality that allows you to collect multiple reports into a single compressed (zipped) file that you may print and/or download to your workstation.

Using this zip functionality, you may print multiple reports with a single print command as follows:

1 From the **CASPER Folders** page (Figure 2-28), select the reports you wish to include in a zipped file by checking the checkbox under the *Select* heading associated with each report.

🖰 Folders		/ly Inbox		
My Inbox	Info∓	Click Link to View Report‡	Date Requested∓	Select∓
<u>)ther Reports</u> IA HHA IAHHA290		HHA Discharges	09/20/2007 10:20:01	
		HHA Agency List	09/20/2007 10:13:01	◄
		HHA Agency List	09/20/2007 10:07:45	
		Report Template Listing	07/20/2007 14:57:41	
	POF	Report Locator Listing	07/20/2007 14:49:15	

Figure 2-28. CASPER Folders Page – Reports Selected

2. Select the **Zip** button.

A Windows File Download dialog box (Figure 2-29) opens.

File Downlo	pad		×
Do you want	to open or save this fil	e?	
м. т	ame: ZipFiles.zip Type: WinZipFile From: devweb.qiesnet.org		
✓ Always ask	<u>Open</u>	<u>S</u> ave	Cancel
While	files from the Internet can b our computer. If you do not his file. <u>What's the risk?</u>	e useful, some fil	

Figure 2-29. Windows File Download Dialog Box

3. If you wish to print the one or more reports in their entirety immediately, select the **Open** button.

NOTE: If you prefer to save the zip file to your workstation so that you may readily view and/or print the reports it in the future, select the **Save** button.

A WinZip window (Figure 2-30) displays the contents of the zipped file.

Figure 2-30.	WinZip Window
--------------	---------------

<mark></mark> v File	VinZip - Actions	-	les[1].zip Jobs Options	Help									×
1	Actions New		Favorites		Extract	in the second se	Encrypt	View	CheckOut	Wizard	Vie	w Style	
2	Name 🔺					Туре		Mod	ified	Size	R	Packed	Pa
	15065	382 Fac	ility Characteris	tics Report.p	df	Adobe	Acrobat Docum	ent 5/3/.	2010 9:33 AM	3,255	37%	2,041	
	15065	386_Fac	ility Quality Mea	isure-Indicati	or Report.pdf	Adobe	Acrobat Docum	ent 5/3/.	2010 9:33 AM	3,502	35%	2,276	
	15065		ident Listing Re	port- Chronic	: Care Sample.pd	f Adobe	Acrobat Docum	ent 5/3/.	2010 9:33 AM	3,430	35%	2,217	
	15065	388 Res	ident Level Rep	, ort- Chronic	Care Sample.pdf	Adobe	Acrobat Docum	ent 5/3/.	2010 9:33 AM	5,172	23%	3,973	
	15065	389_Res	ident Level Rep	ort- Post Acu	te Sample.pdf	Adobe	Acrobat Docum	ent 5/3/.	2010 9:33 AM	3,420	36%	2,189	
elec	ted 0 files	0 bytes	3			Total 5 f	files, 19KB					00)

4 Select (highlight) each report you wish to print.

NOTE: To highlight two or more reports, press and hold the Ctrl key as you select the reports.

5. From the *File* menu select the *Print* option (Figure 2-31) or right-click and select the *Print* option. All pages of each report are sent to your default printer.

WinZip - ZipFiles[1].zi	р									×
<u>File Actions View Jobs Opti</u>	ons <u>H</u> elp									
🞾 <u>N</u> ew Archive	Ctrl+N			D D -					14	
🤔 Open Archive	Ctrl+O				<u> </u>			(
🥥 Eavorite Zip Folders	Shift+F	Extract	Mail	Encrypt \	/iew	CheckOut	Wizard	Vie	ew Style	
📀 New Zip File on CD or DVD	Shift+Z		Туре		Modified	4	Size	R	Packed	Pat
🐼 <u>C</u> lose Archive	Shift+L	.pdf		Acrobat Document			3,255	37%	2,041	
Save <u>A</u> s	Shift+S	ator Report.pdf		Acrobat Document	2002/00/2		3,502	35%	2,276	
Send To	•	hic Care Sample.pdf	Adobe	Acrobat Document	5/3/201	MA 88:0 0.	3,430	35%	2,217	
Print	Ctrl+P	c Care Sample.pdf	Adobe	Acrobat Document	5/3/201	0 9:33 AM	5,172	23%	3,973	
<u> </u>	Carin	cute Sample.pdf	Adobe	Acrobat Document	5/3/201	.0 9:33 AM	3,420	36%	2,189	
Create Shortcut										
	Shift+W	-								
Recent (<u>H</u> istory)	•								1	
🕞 E <u>x</u> it	Alt+F4	ernet Files\Content.	IES\41NG	BESB\ZinEiles[1].z	in					· ·

Figure 2-31. WinZip File Menu

NOTE: To print select pages from the zipped reports you must open each report individually.

CUSTOMIZING THE CASPER REPORTING TOOL

Maintaining Folders

My Inbox is the default folder and cannot be deleted. You can, however, change the name of this folder and create additional folders.

Select the **Maint** button [Alt + m] from the CASPER toolbar to access folder maintenance functions. The **CASPER Maintenance** page (Figure 2-32) is presented.

Figure 2-32. CASPER Maintenance Page

CASPER Maintenance	Logout Folders MyLibrary Reports Queue Options Maint Home
Select Folder Type: Visible Folders 🔽 Select	
Folder Shared Hide Delete Name Folder Folder Folder	
My Inbox	
Search: Folder Name Contains 💌 Search	HideAll Insert Save Return

The **CASPER Maintenance** page includes a *Select Folder Type* field with which you indicate the types of folders, *Visible Folders* (the default) or *Hidden Folders*, you wish to view and/or maintain. From the *Select Folder Type* drop-down list, select the type of folder you wish to view and select the **Select** button.

To create a new folder, select the **Insert** button [Alt + i]. A *NewFolder* field is presented on the page. In the *NewFolder* field (Figure 2-33), specify the name of the folder you wish to add.

Select Folder Type:	Visible Folders 💌 Se	lect		
Folder	Shared Hide	Delete		
Folder Name	Folder Folder			
/ly Inbox				
NewFolder		Delete		

Figure 2-33. CASPER Maintenance Page – Insert New Folder

Select the **Save** button [Alt + c] to save the new folder.

Select the **Insert** button again to create another folder, or the **Return** button [Alt + u] to return to the **CASPER Folders** page.

To delete a folder you created, check the *Delete* box associated with that folder and select the **Save** button.

NOTE: You can delete only those folders you created. You cannot delete a shared folder.

Moving Reports

The **CASPER Folders** page provides you with functionality to move reports from one folder to another.

1 To move one or more reports, check the *Select* box to the far right of each report and select the **Move** button [Alt + n] (Figure 2-34).

Figure 2-34. CASPER Folders Page - Moving Reports

Folders		/ly inbox		
ly Inbox	Info 🖡	Click Link to View Report¥	Date Requested∓	Select∓
<u>her Reports</u> A HHA IAHHA290	anj	HHA Error Message	09/20/2007 11:44:23	
		HHA Discharges	09/20/2007 10:20:01	
		HHA Agency List	09/20/2007 10:13:01	
		HHA Agency List	09/20/2007 10:07:45	
		Report Template Listing	07/20/2007 14:57:41	
	FOF	Report Locator Listing	07/20/2007 14:49:15	



The **CASPER Move** page (Figure 2-35) lists the report(s) you selected.

Figure 2-35. CASPER Move Page

CASPER Move		Logout Folders MyLibrary Reports Q	leue Options Maint Home
Nove From: My Inbox	Document Name		Report Complete
To: Other Reports 💌	HHA Error Message		09/20/2007 11:44:32

<u>Certification And Survey Provider Enhanced Reports</u> CASPER Reporting HHA Provider User's Guide **3.** Open the drop-down list and highlight the folder to move the report(s) to. Select the **Save** button.

From the **CASPER Move** page, you may also change a report title. Select a report displayed under the *Document Name* heading and type a name for the report that is more meaningful to you.

When all changes are complete, select the **Save** button to retain the change.

Deleting Reports

The **CASPER Folders** page also provides you with functionality to delete reports.

Place a check in the Select box to the far right of each report to delete on the CASPER Folders page (Figure 2-31, above) and select the Delete button [Alt + x]. A delete confirmation dialog box (Figure 2-36) is presented.

Figure 2-36. Delete Confirmation

Microsoft Intern	net Explorer	×
2 Delete	the checked fi	les?
ОК	Cancel	

2. Select the **OK** button to confirm the delete request. The **CASPER Delete** page (Figure 2-37) is presented indicating the report(s) you successfully deleted.

Figure 2-37. CASPER Delete Page

CASPER Delete	Logout Folders MyLibrary Reports Queue Options Maint Home
Delete Results: User IAHHA290 has successfully deleted: • HHA Agency List	
	Back Next

Other Customizations

As reports accumulate in a folder, the list of reports on the **CASPER Folders** page may expand to multiple pages. You can access specific pages of the list with the page number links (Figure 2-38) at the bottom of the pane.

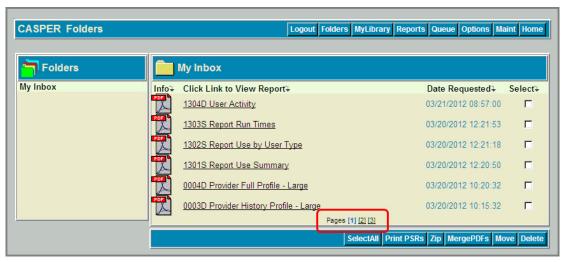


Figure 2-38. CASPER Folders Page

To alter the number of reports per page that display in a folder, and further customize the CASPER Reporting application, select the **Options** button [Alt + o] from the CASPER toolbar. The **CASPER Options** page (Figure 2-39) is presented.

Figure 2-39. CASPER Options Page

Jser Settings		
Rows:	6	Allow Share
OutputFormat:	PDF	Click here to see a listing of reports with Accessibility Option PDFs available to you.
ColorScheme:	Original 💌	
ViewStyle:	Classic 💌	

The following items are currently available on the **CASPER Options** page:

• *Rows*: alters the number of reports available on each page and, therefore, the size of the report-viewing window. This setting must be between 5 and 50.

- *Allow Share*: displays when you have access to Shared Folders, but it cannot be modified. Only a CASPER Reporting Administrator can add or remove Shared Folder access.
- OutputFormat: specifies the format of report output: PDF, CSV, EXCEL, or PDF Accessibility Option. The default is PDF.

NOTE: When the *PDF* option is selected, reports are generated without accessibility tags for use with assistive reading equipment and software. When the *PDF Accessibility Option* is selected, report output includes accessibility tags, if available. With the *PDF Accessibility Option* selected, if you run a report that does not include accessibility tags, no report is generated. Select the <u>Click here to see a listing of reports with Accessibility</u> <u>Option PDFs available to you</u> link to identify the CASPER reports that include accessibility tags and the report category in which each is found. You may also run report 1205D in the Audit Reports category to view a list of the reports that include accessibility tags.

- ColorScheme: allows color customization of the application colors. Select from: CMS, QNE, Footprints, Original, Lavender, Forest, Wood, and Winter.
- *ViewStyle*: allows customization of the layout of your CASPER Reporting application workspace. Select from: *Classic*, *DDLB* (drop-down list box), and *TreeView*. The screen shots included in this manual depict the *Classic* ViewStyle.

After selecting the desired options, select the **Save** button [Alt + c].

The **Return** button [Alt + u] on the **CASPER Options** page returns you to the previous page you were viewing.

CASPER TOPICS

The *Topics* pane of the **CASPER Topics** page (Figure 2-40) provides instructions, notices and bulletins, helpful information, and downloadable files pertaining to the CASPER Reporting application.



CASPER Topics	Logout Folders MyLibrary Reports Queue Options Maint Home	•
Topics	Home Page	
Home Page Merge PDF Feature IE Active X Plug-in ZIP Feature	Welcome to CASPER	
◆ <u>Java JRE</u> <mark>⊯PSR/Jasper Report Viewer & Unzip Utility</mark>	Folders - View your folders and the documents in them	
	Reports Select report categories and request reports Queue - List the reports that have been requested but not yet completed Options - Customize the report format, number of links displayed per page and report	
	Maint Perform maintenance such as creating, renaming and/or deleting folders Home Return to this page	

The **CASPER Topics** page is presented with each successful login to the CASPER Reporting application. To access the **CASPER Topics** page anytime thereafter, select the **Home** button [Alt + g] on the CASPER toolbar.

VIEWING REPORTS OFFLINE

You can save PDF-formatted reports to a local drive and then view them with Adobe Reader at any time. Likewise, you can save and then view XLS- and CSV-formatted reports with Microsoft Excel. It is not necessary to be logged in to the CASPER Reporting application to view these types of reports offline.

NOTE: In order to be viewed offline, a report must first be saved to a local drive, workstation or other storage medium. Refer to the *Viewing, Printing, And Saving Reports* section for instructions.

REPORT SEARCH FEATURE

A search feature is available on the **CASPER Reports** page (Figure 2-41). It returns a list of reports (only those to which you have access) matching the search criterion you entered.

Report Categories	HHA OBQI Reports
IA OBQM Reports IA Provider Jex Reports Join (C) Join (C)	Case Mix Analysis Summary • OBQI Case Mix Analysis Summary Report Report • Case Mix Profile at SOC/ROC For RAO Report - Current/Reference Case Mix for RAO - 3 Col • Case Mix Profile at SOC/ROC For RAO Report - Current/Reference Case Mix for RAO - 3 Col • Case Mix Profile at SOC/ROC For RAO Report - Current/Prior/Reference Case Mix for RAO - 3 Col • Case Mix Profile at SOC/ROC For RAO Report - Current/Prior/Reference Case Mix Profile at SOC/ROC For RAO Report - Current/Prior/Reference • Request multiple OBQI 2 column reports DBQI Report 3 Col Package • Request multiple OBQI 3 column reports DBQI come: Desc - 2 Bar • Descriptive Outcome Report - Current/Reference Report • Descriptive Outcome Report - Current/Reference Report • Risk Adjusted Outcome Report - Current/Prior/Reference Report • Tally Case Mix Report
🔺 I	Tally Outcome Report Tally Outcome Report
	Pages [1]

Figure 2-41. Report Search Feature

To perform a search, enter the characters for which you wish to search in the *Search* text box and select the **Search** button [Alt + c]. Leave the textbox blank to receive a complete list of all reports to which you have access.

Report Category, Report Name, and Report Description are searched for the criterion entered. For example, if you enter "outcome" as the search criterion, all reports containing "outcome" in the Report Category, Report Name, or Report Description are listed (Figure 2-42).

Figure 2-42. Report Search Results

CASPER Find Report		Logout Folders MyLibrary Reports Queue Options Maint Home
search Criteria : outcome		
Report Category#	Report Name∓	Report Description 4
HHA OBQI Reports	Outcome: Desc - 2 Bar	Descriptive Outcome Report - Current/Reference
HHA OBQI Reports	Outcome: Desc - 3 Bar	Descriptive Outcome Report - Current/Prior/Reference
HHA OBQI Reports	<u>Outcome: Risk Adj - 2 Bar</u>	Risk Adjusted Outcome Report - Current/Reference
HHA OBQI Reports	<u>Outcome: Risk Adj - 3 Bar</u>	Risk Adjusted Outcome Report - Current/Prior/Reference
HHA OBQI Reports	<u>Tally: Outcome</u>	Outcome Tally Report
HHA OBQM Reports	AEO-Graph 2	Adverse Event Outcome - 2 Col
HHA OBQM Reports	AEO-Graph 3	Adverse Event Outcome - 3 Col
HHA OBQM Reports	Patient Listing	Adverse Event Outcome - Patient Listing

You may select the underlined report name link to go to the criteria selection and submission page for that report.