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ACCESSING CASPER REPORTS

OBQM, OBQI, and HHA Provider (HHA Web) Reports are available to agencies through the CASPER Reporting System.

Agencies can access the reports via the State Page, and will be redirected to the log in screen of the CASPER Reporting System once the HHA Online Reports link is selected.

To access reports using the CASPER Reporting application:

1. Access the OASIS Welcome home page (Figure 2-1). Select the Online Reports link.

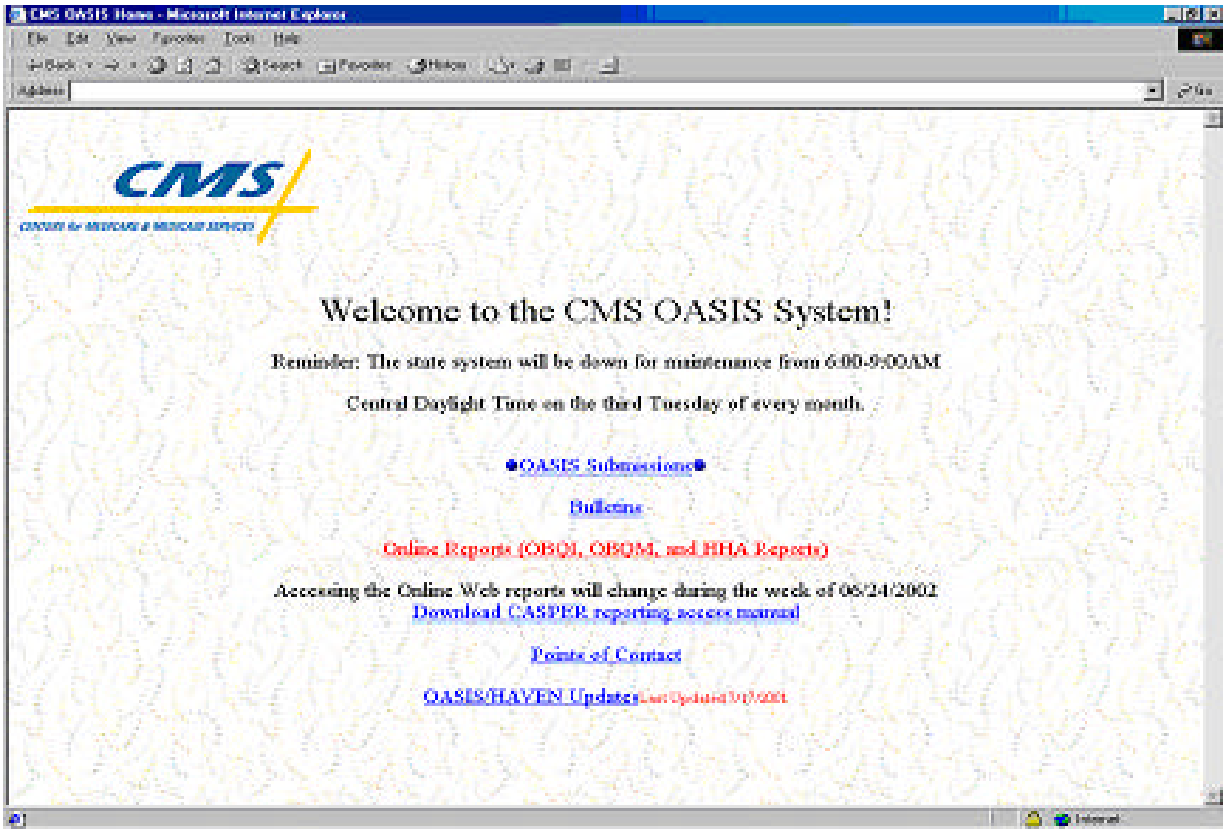


Figure 2-1. OASIS Welcome page

2. Selecting the CASPER Reports link from any of the preceding websites will connect the user to the CASPER Login page. (Figure 2-2).

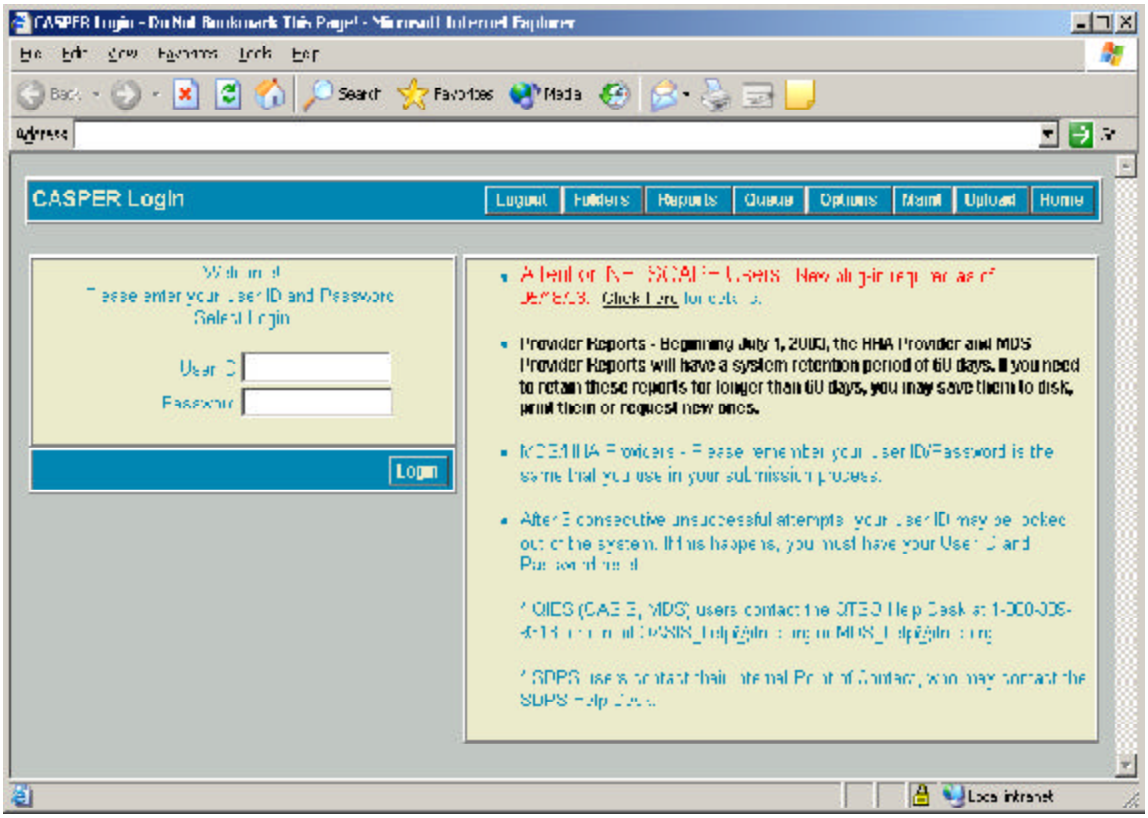


Figure 2-2. CASPER Login Page

NOTE: If you are a first-time user **and using a Netscape browser**, you must download the required plug-in. If you are using Internet Explorer, or if you have previously downloaded this plug-in for use with the CASPER Reporting application, this step is NOT required.

3. Download instructions for obtaining the plug-in are available by the selecting the link on the CASPER Login page (Figure 2-1), or via the CASPER Topics / Home button (Figure 2-3). If you are a first-time user **and using a Netscape browser**, select the Datawindow Report Viewer Plug-in link to download the plug-in.

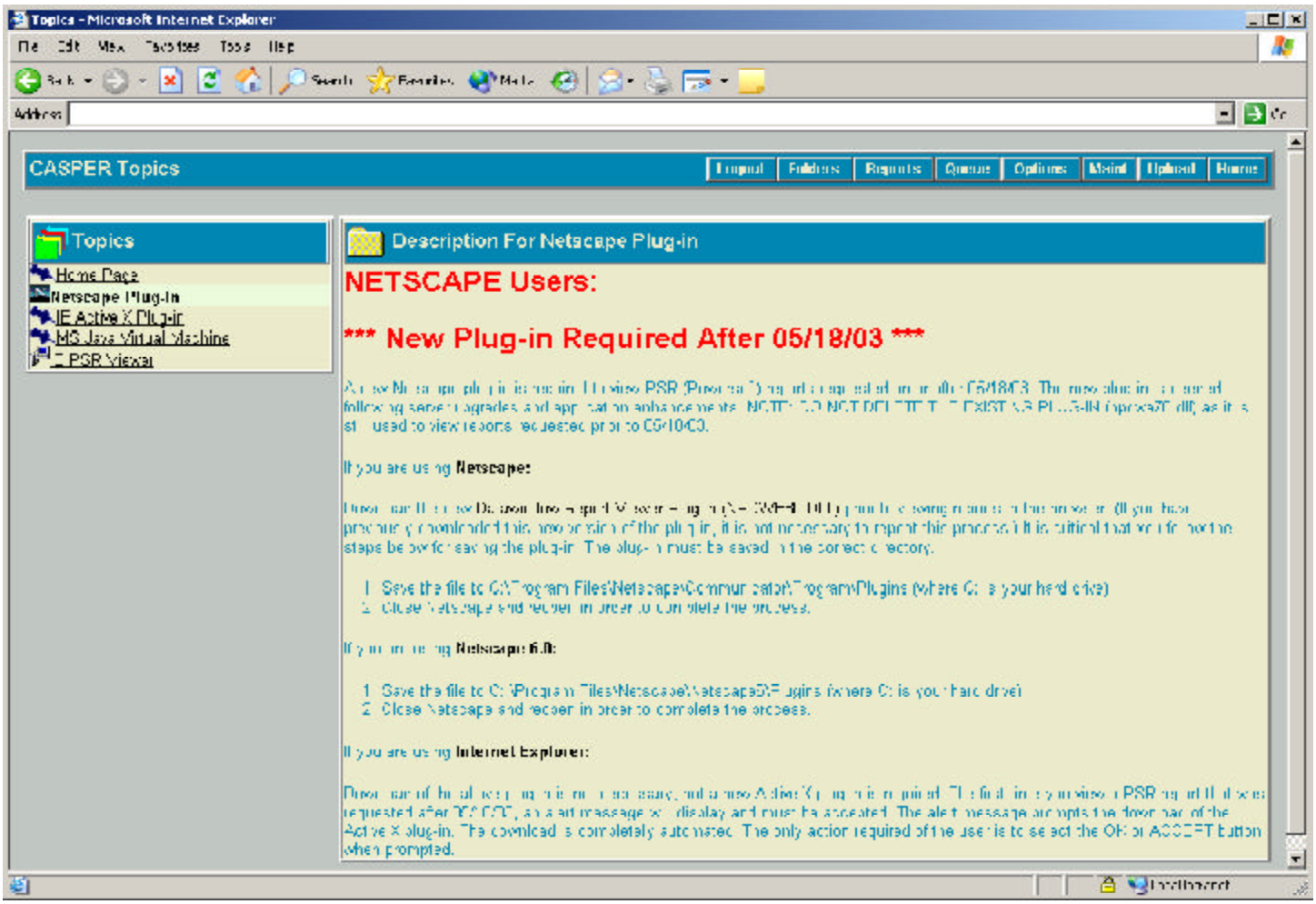


Figure 2-3. Plug-in Download Instruction Window

NOTE: An updated version of the plug-in was made available in May 2003. **This updated version is required for Netscape users** in order to properly view and print reports within the CASPER Reporting application. To verify that the correct version is being used, navigate to the Windows Explorer directory where the plug-in is stored. The file name is “NPDWE80.DLL” and file size is 2,430 KB.

4. For those Netscape users that select the plug-in link, a Save As box will display. (Figure 2-4.)

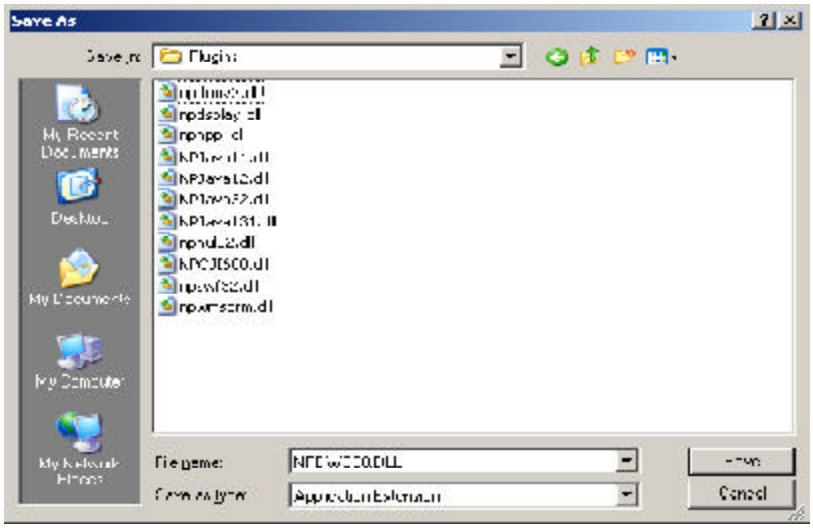


Figure 2-4. Save As Box

If you are using **Netscape**, save the file to C: (where C is your hard drive):

C:\ProgramFiles\Netscape\Communicator\Program\Plugins

If you are using **Netscape 6.0**, save the file to C: (where C is your hard drive):

C:\ProgramFiles\Netscape\Netscape6\Plugins

NOTE: After saving the plug-in, you must close all active sessions of Netscape in order to complete the plug-in download and installation process.

If you are using **Internet Explorer**:

This plug-in is no longer needed for use with Internet Explorer. You will be prompted to download an Active X plug-in the first time you view a report in the CASPER Reporting application. That process is completely automated. The only action required of the user is to select the OK or ACCEPT button when prompted to download the Active X plug-in.

If a red 'X' displays when trying to view a report with Internet Explorer, verify that:

a. 'OK' or 'Accept' was selected when the security certificate was presented
b. The user who is logged in at the workstation has download rights
c. MS Java Virtual Machine (JVM) is installed and enabled

5. Enter your login information in the appropriate fields. (Figure 2-5.)

NOTE: For most CMS, QIO, and State Agency users, the User ID and Password are the same that were previously used when accessing the OBQM Reports application. The User ID and Password for HHA and MDS Providers is the same one that is used when submitting assessment data.

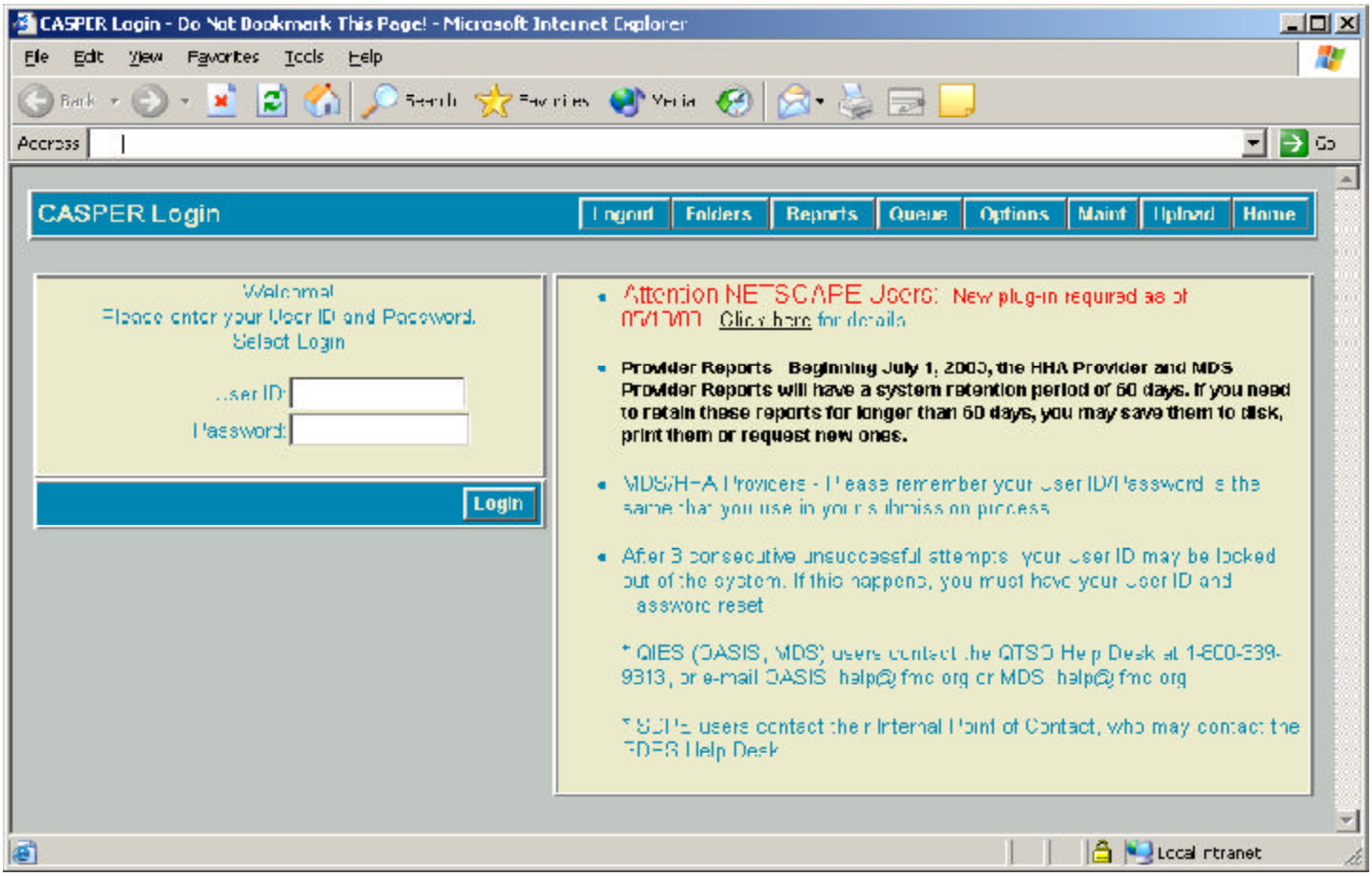


Figure 2-5. CASPER Login Page

6. The CASPER Topics / Home page will display. (Figure 2-6.)

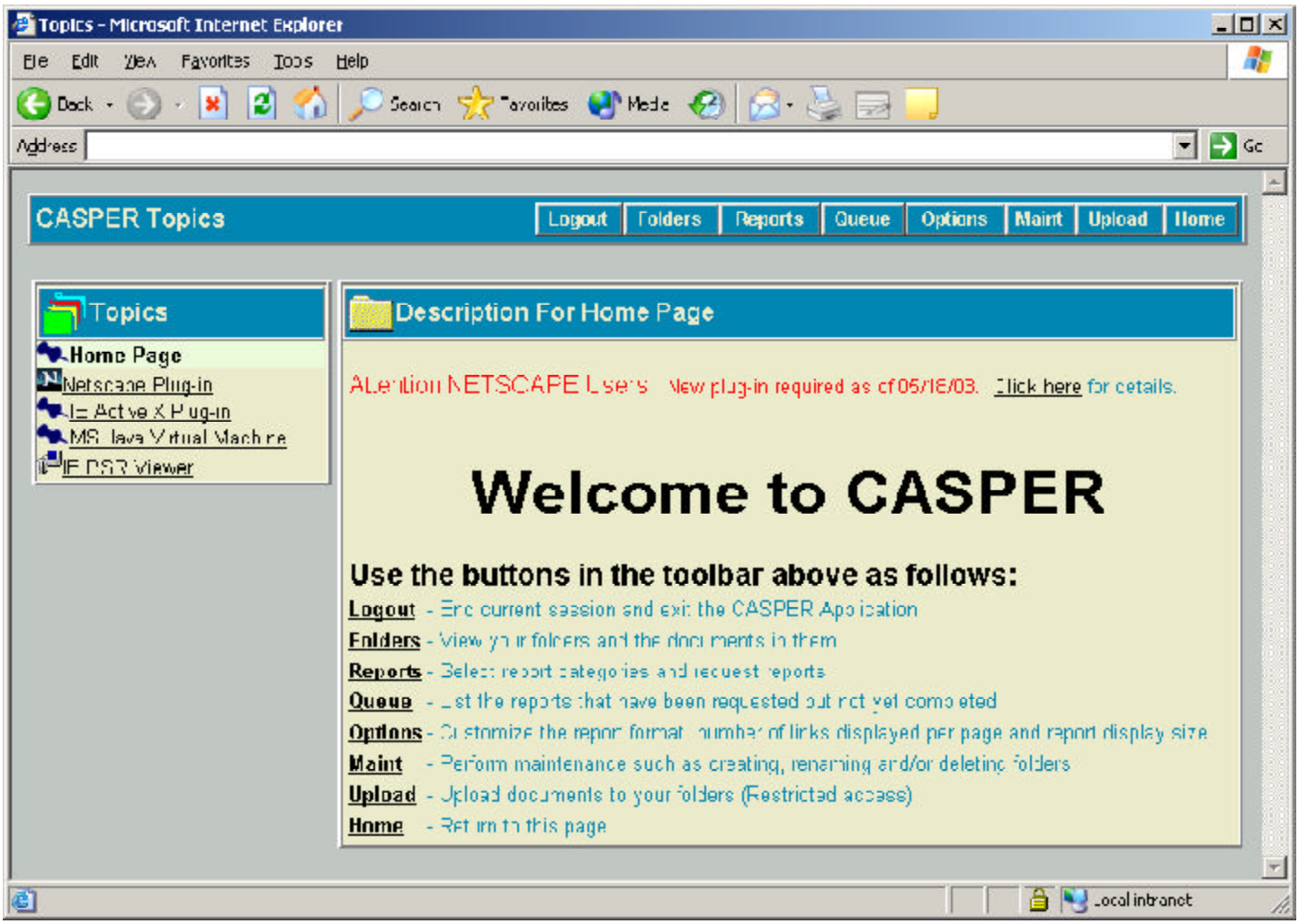


Figure 2-6. CASPER Topics / Home Page

7. To begin using the CASPER Reporting application, select one of the buttons in the CASPER menu bar, or the corresponding link used in the description section.

NOTE: For example, if the Folders button is selected, you will enter the CASPER Reporting application on the page where previously requested reports are stored. If using the Reports button, you will enter the CASPER Reporting application on the page that allows you to select and request reports.

REQUESTING REPORTS

1. To request reports, enter the CASPER Reports page by selecting the Reports button in the CASPER menu bar. The Report Categories section displays the various report groups that have been assigned to your User ID. Depending on the specific level of access, varying users may have access to additional or different report catergories. The section on the right displays the reports that are contained in the selected report group. (Figure 2-7.)

   NOTE: For the purposes of this section of the guide, the OBQI Reports will be demonstrated. The same procedure is followed when requesting other reports in the CASPER Reporting application.

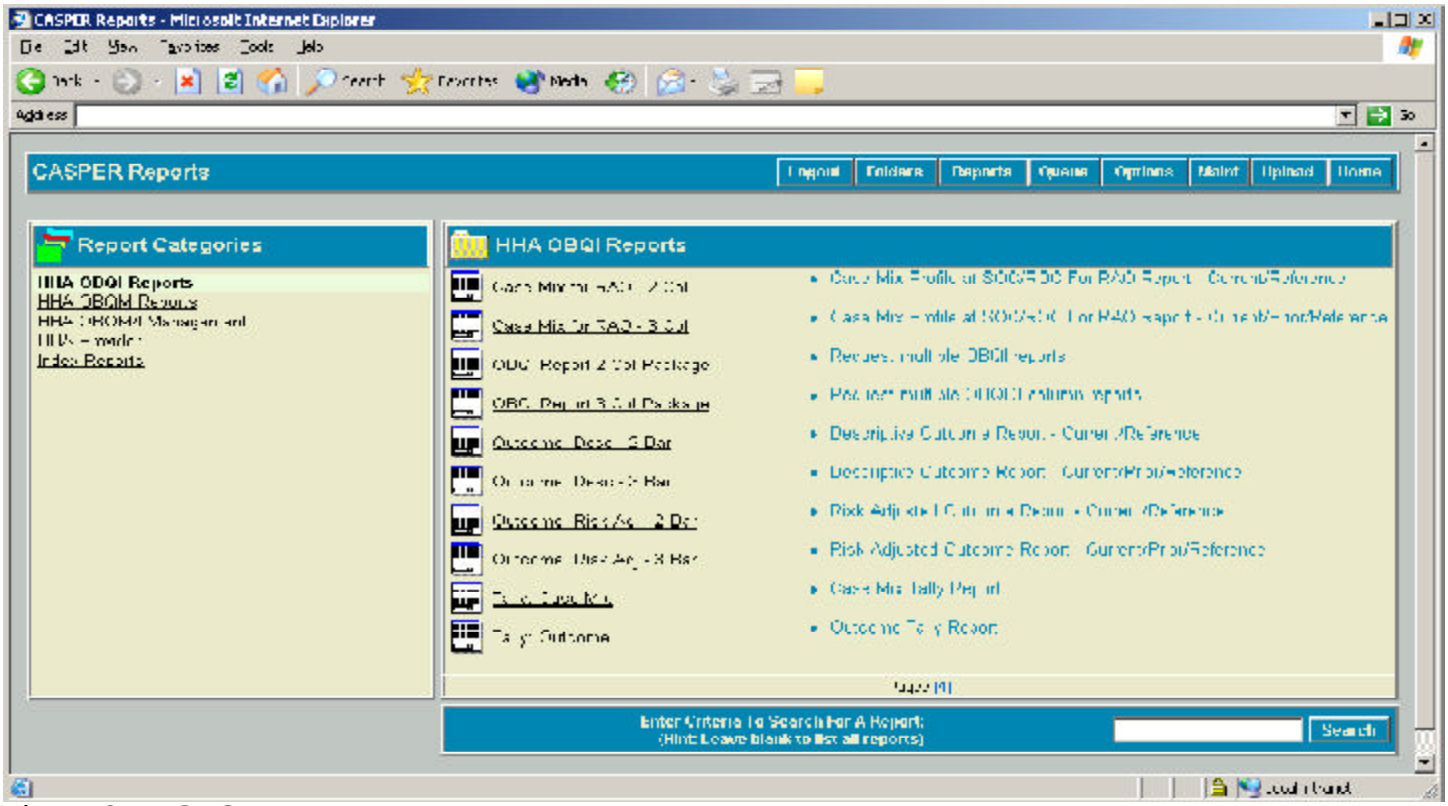


Figure 2-7. CASPER Reports Page

2. To request a specific report, click on the abbreviated report name. These are displayed as links in black, underlined text.

3. The CASPER Reports Submit page will display allowing the user to select the desired report criteria. When finished, select the Submit button. (Figure 2-8.)

NOTE: The criteria choices that are available will vary depending on:

a. the specific report being requested
b. the user's level of access

See individual report description information in the following sections of this guide for report-specific critieria.

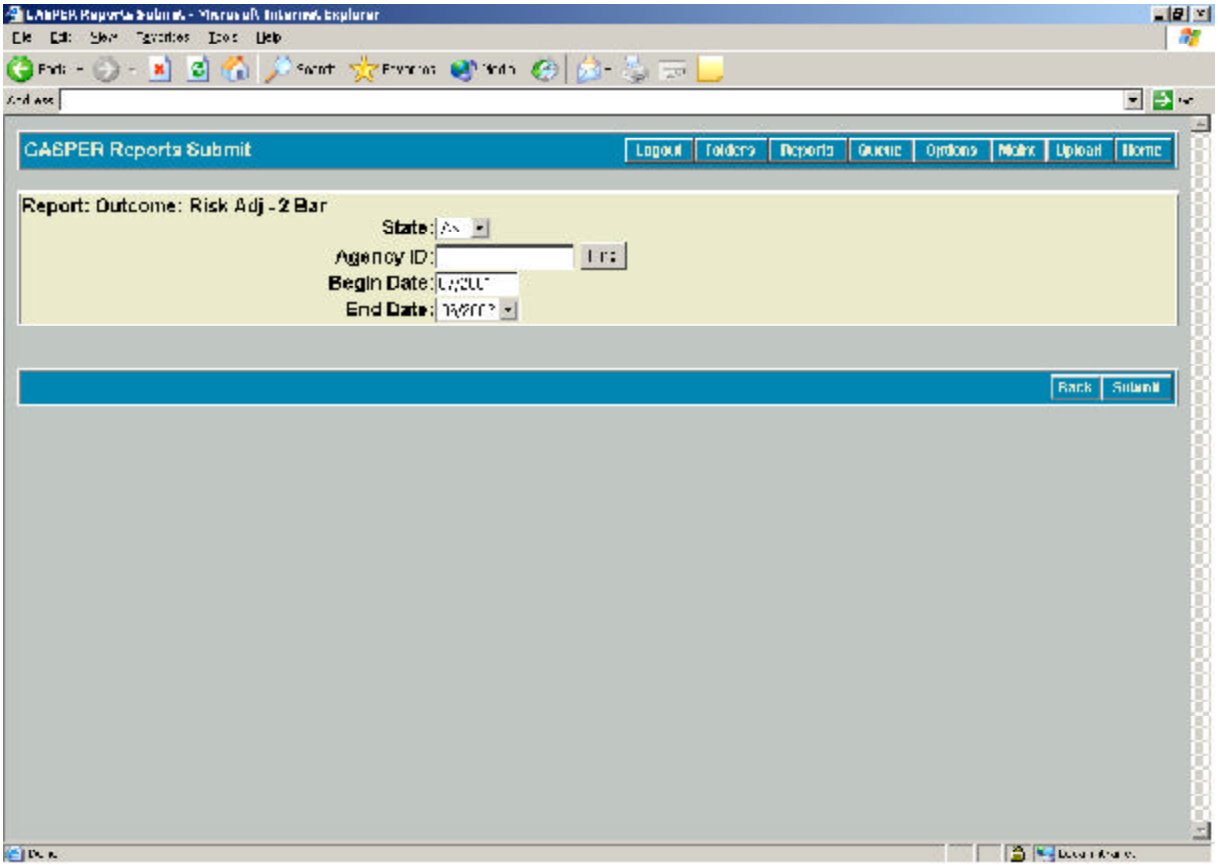


Figure 2-8. CASPER Reports Submit Page

NOTE: For OBQI and OBQM Reports, the FIND button is used when the Agency ID is unknown to the user. Enter the **first letter** (uppercase only) of the agency name in the Agency ID field then select the FIND button. A pop-up box will display with a list of all agencies that begin with that letter. Select the desired agency from the list and click the OK button. The Agency ID will then display in the Agency ID field.

4. Following a report request, the user will receive verification that the request has been received by the system. (Figure 2-9.)

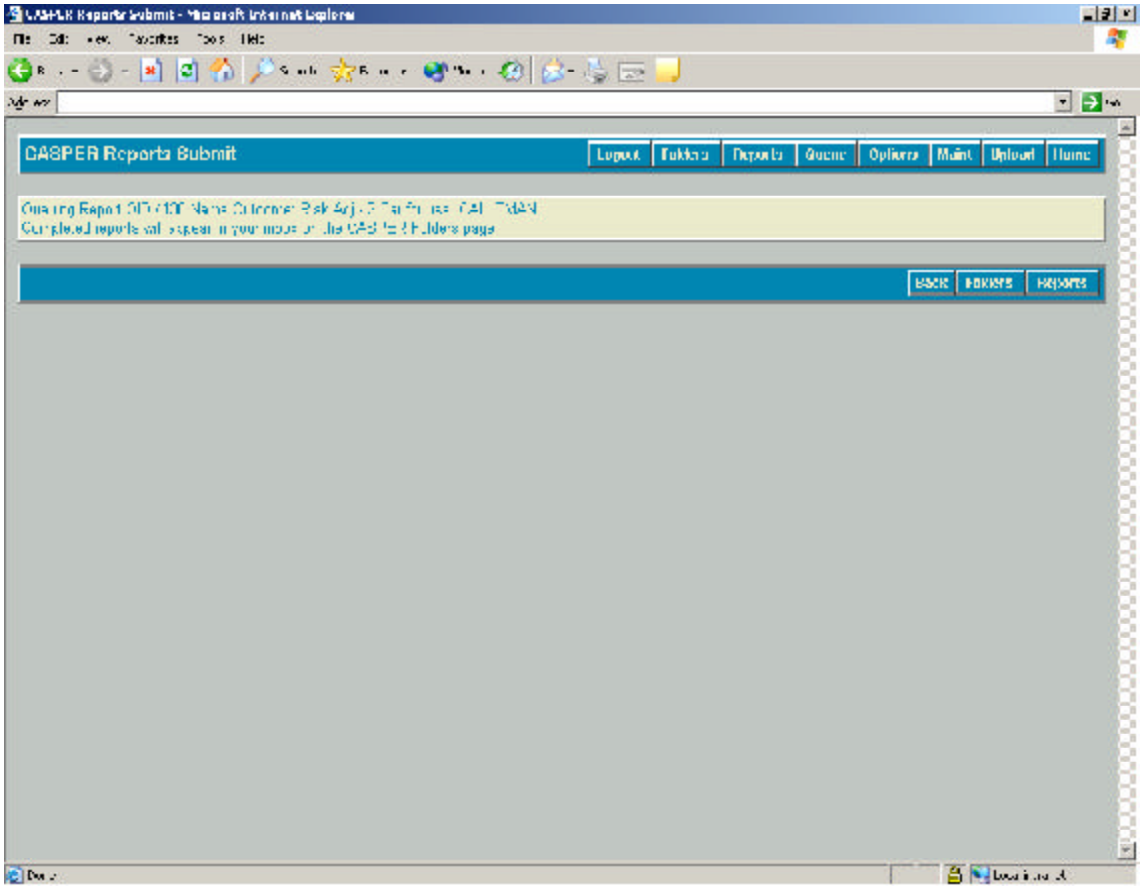


Figure 2-9. CASPER Reports Submit Verification Page

5. To request another report, select the Reports button to return to the listing of reports.

6. Completed reports are delivered to the default folder, My Inbox, and are accessed by selecting the Folders button.

7. The status of requested reports can be viewed by selecting the Queue button in the CASPER menu bar. The CASPER Report Queue page will display with detailed information including the report's position in the queue, the corresponding Que Id, the name of the requested report, the processing status, and the duration (or time) that the report has spent processing. (Figure 2-10.)

8. The title bar "Processing # of # Reports" informs the user of how many reports are currently being processed for all users in the nation. For example, if the Queue Position is 1 of 50, this explains that the report is first to be processed out of 50 requests submitted nationwide.

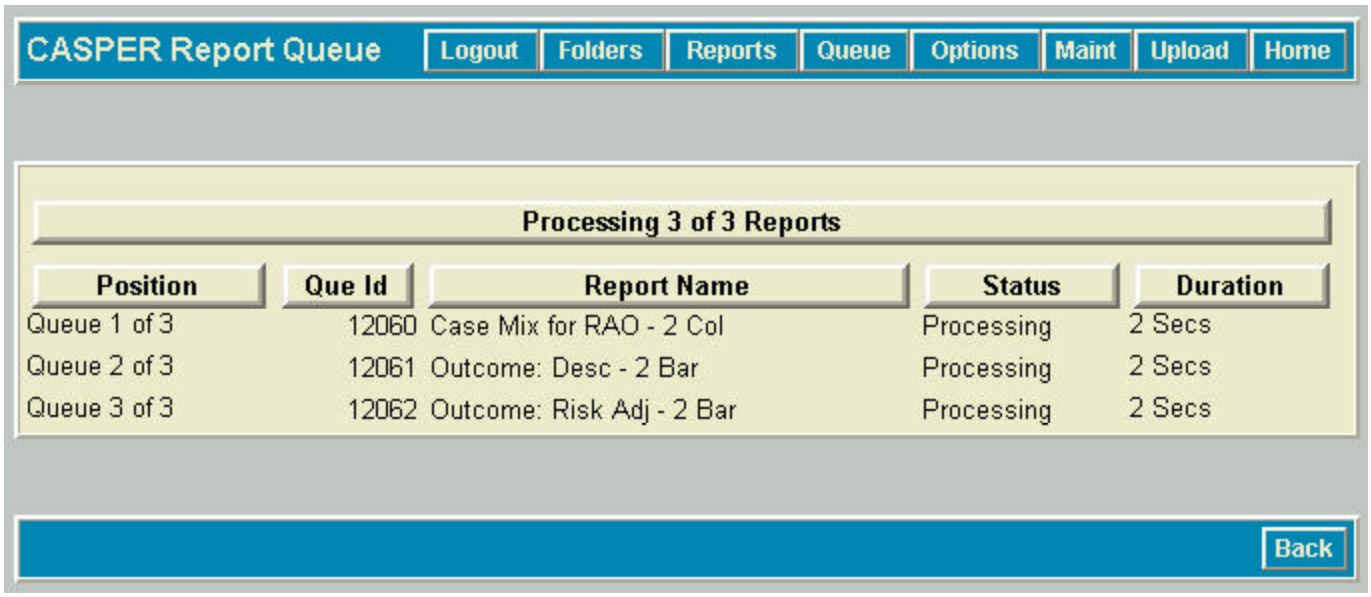


Figure 2-10. CASPER Report Queue Page

NOTE: The length of time needed to generate a report following a request may vary. Therefore, it is suggested that the user log off after requesting the desired reports, and then return to the reporting system at a later time to retrieve the reports. On the other hand, some reports may process so quickly that they are delivered to the user's Inbox before they can be viewed on the CASPER Queue page.

1. All user levels with access to the OBQI and OBQM Report categories will have “Package” listings which allow multiple reports to be requested in a single submission. These packages also allow state and national users to select and request reports for multiple agencies. (Figure 2-11.)

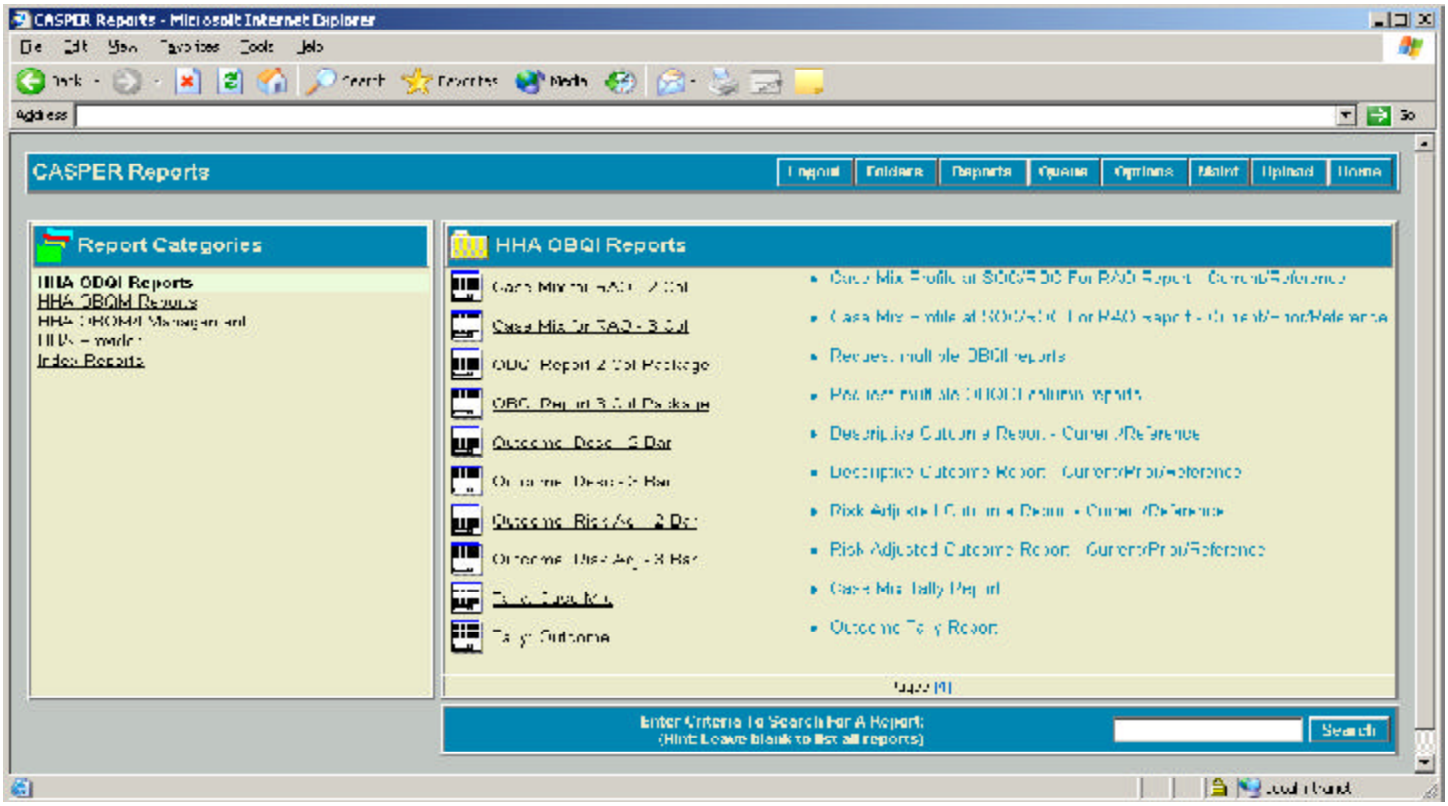


Figure 2-11. CASPER Reports Page

NOTE: When submitting requests containing multiple reports and/or agencies, expect the total processing time to increase. It’s recommended that requests be limited to a reasonable number.

2. When selecting the packages, the name of each report included will be present with checkboxes (checked by default). If only specific reports in the group are desired, uncheck those that are not needed. (Figure 2-12).

3. Add the Agency ID for each desired agency. IDs may be manually entered in the Agency ID text box, followed by selecting the "Add Agency ID" button; or use the "Find By Name" button and select multiple ids from the pop-up list. The "Find By Name" button searches for matches based on the first letter of the agency name (uppercase only) and can be used as many times as needed until all of the desired Agency IDs have been chosen.

   NOTE: As each Agency ID is added to the list, it remains highlighted. If you choose to only submit requests for some of the listed selections, click on the listings (while holding the "Ctrl" key) of those you'd like to request. Any Agency IDs that are not highlighted will not be submitted for processing.

4. Choose the desired reporting period and select the "Submit" button. Each report will then be individually processed in the queue and delivered to the Inbox.

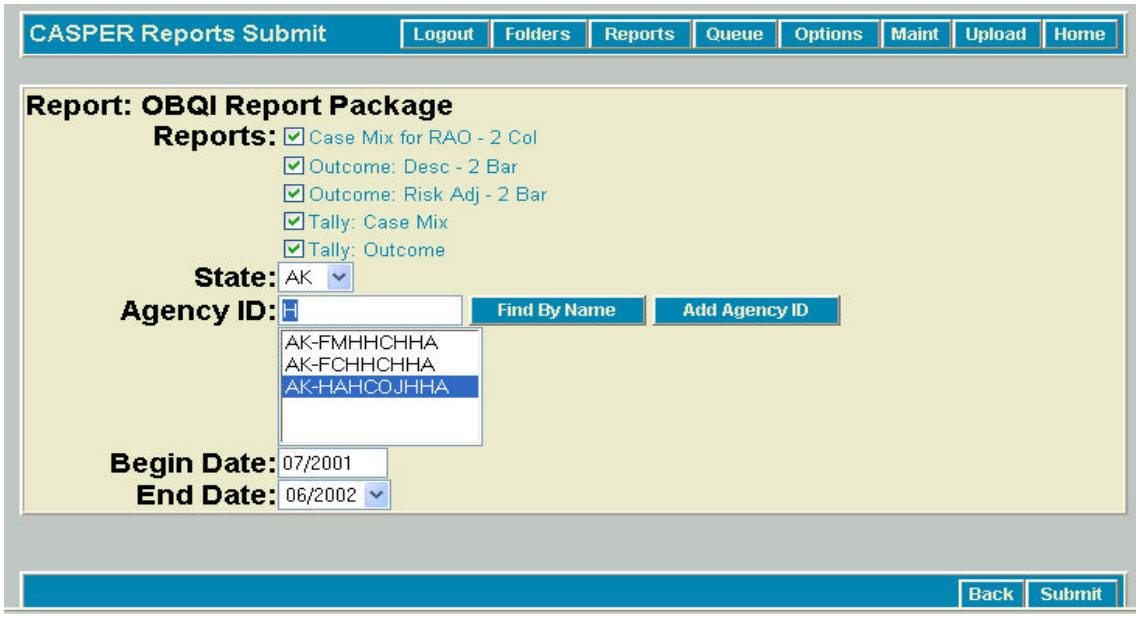


Figure 2-12. CASPER Reports Package

SHARED FOLDERS

1. Shared folders are ones similar to those already used. However, these folders are created for users and labeled as “Read Only”. Users will have access to the folders and the reports that they contain, but will not be able to alter, modify, delete, move, or rename these items. (Figure 2-13).

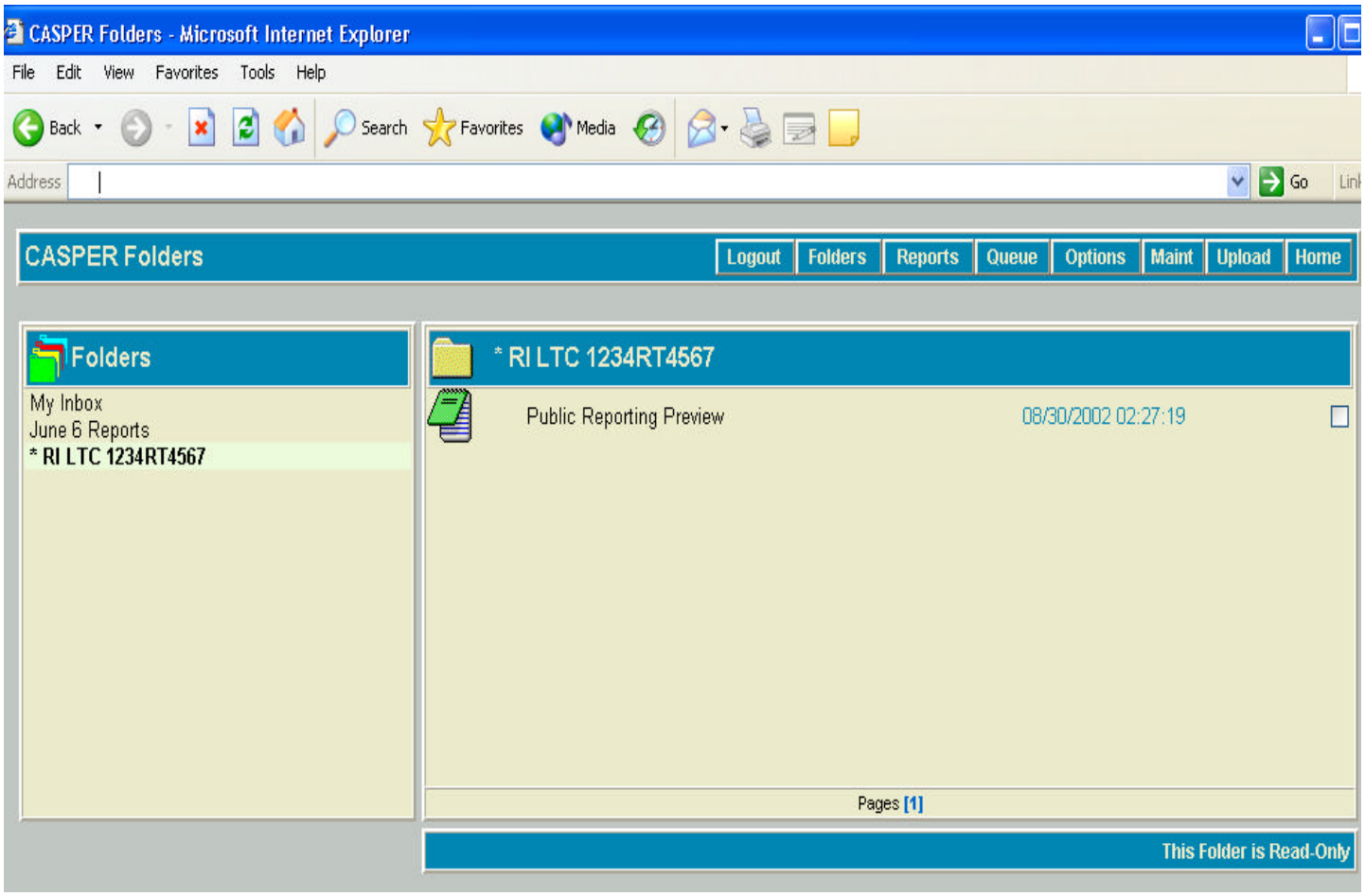


Figure 2-13. Shared Folder

NOTE: The naming convention used for shared folders is as follows: Asterisk (space) state abbreviation (space) facility type (space) facility ID

2. Facility level users will see their own shared folder, but will not have the ability to access shared folders for other facilities. State Agency and QIO users will have access to all shared folders for their appropriate state(s). CMS users, on the other hand, will have access to all shared folders for every facility in every state.

3. Because of the number of shared folders that are available to CMS, QIO, and State Agency users, a Search feature was implemented to help manage this access. Shared folders will not be visible on the CASPER Folders page by default to these users.

   To seach for a specific provider's shared folder, visit the CASPER Maintenance page. (Figure 2-14.)

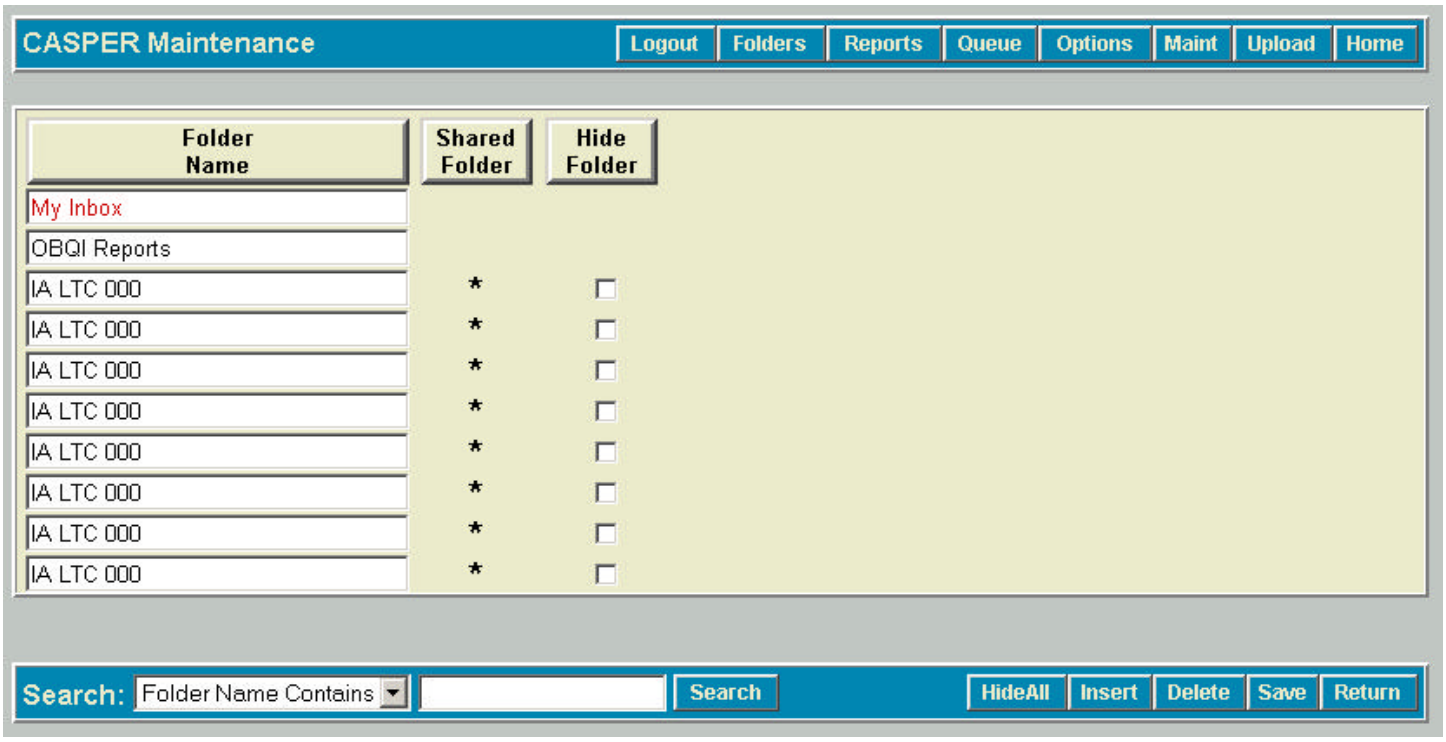


Figure 2-14. CASPER Maintenance Page

Searches may be perfomed using the following criteria:

a. Folder Name Contains
b. Provider Name
c. Provider Number

For example, a CMS user performing a search on "Folder Name Contains" with an entry of 'IA' will return all shared folders for the state of Iowa. The user may place a checkmark in the corresponding checkbox under the "Visible?" heading for the provider folder which they want access to, or select the "Show All" button to automatically check every box. (Figure 2-15). Selecting the "Hide All" button will remove all checkmarks from the displayed page.

4. After marking the desired checkboxes, select “Save” to retain this setting, then select “Return” to return to the CASPER Maintenance page. The selected shared folder(s) will be available on the CASPER Folders page.

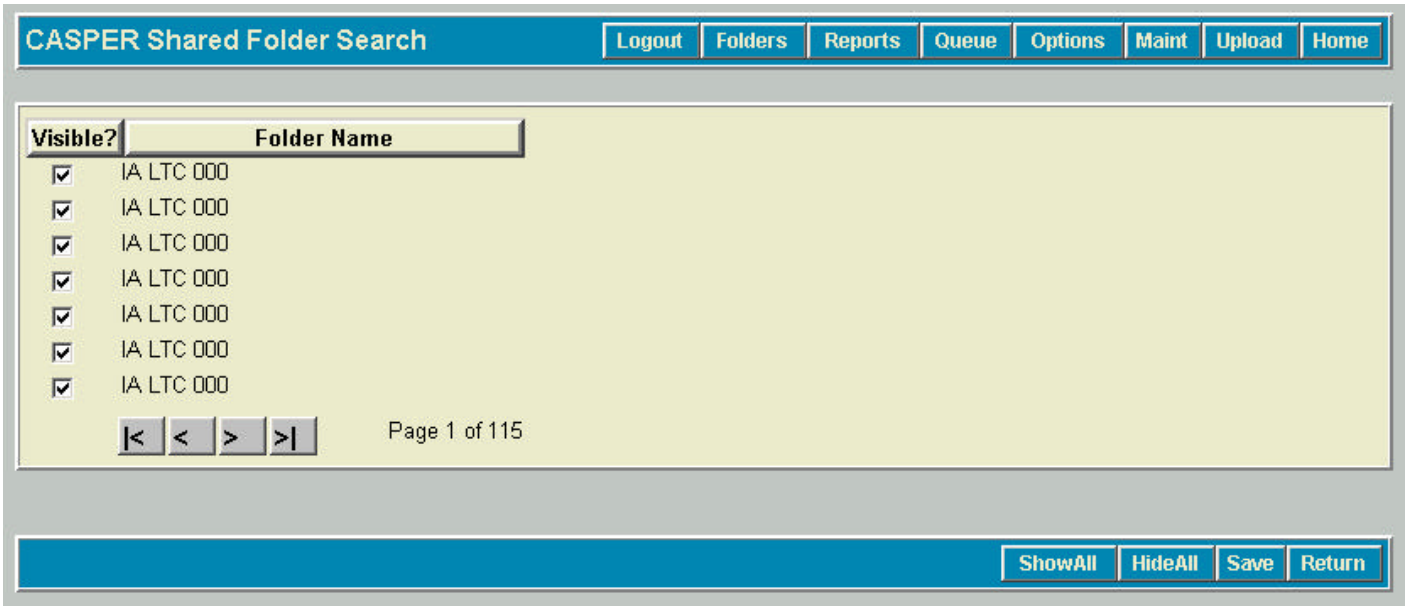


Figure 2-15. CASPER Folders Page

NOTE: When entering search criteria, upper or lower case characters may be used. Also, it is recommended that you be as specific as possible when searching for shared folders in order to narrow your results.

5. Shared folders that have been set as visible will also display on the CASPER Maintenance page as shown here. (Figure 2-16).

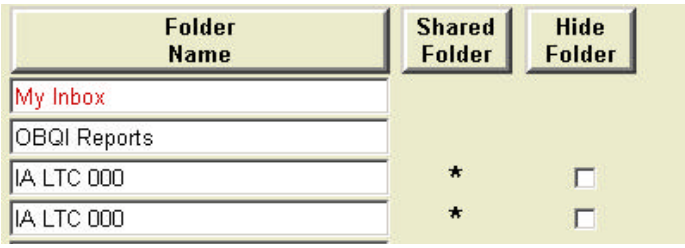


Figure 2-16. Visible Shared Folder

NOTE: To “hide” unwanted folders, place a checkmark in each box under the “Hide Folder” heading or select the “Hide All” button as shown in Figure 2-14.

1. In order to view completed reports, select the Folders button. The CASPER Folders page will display. When completed, previously requested reports are delivered to the default folder titled My Inbox. (Figure 2-17.)

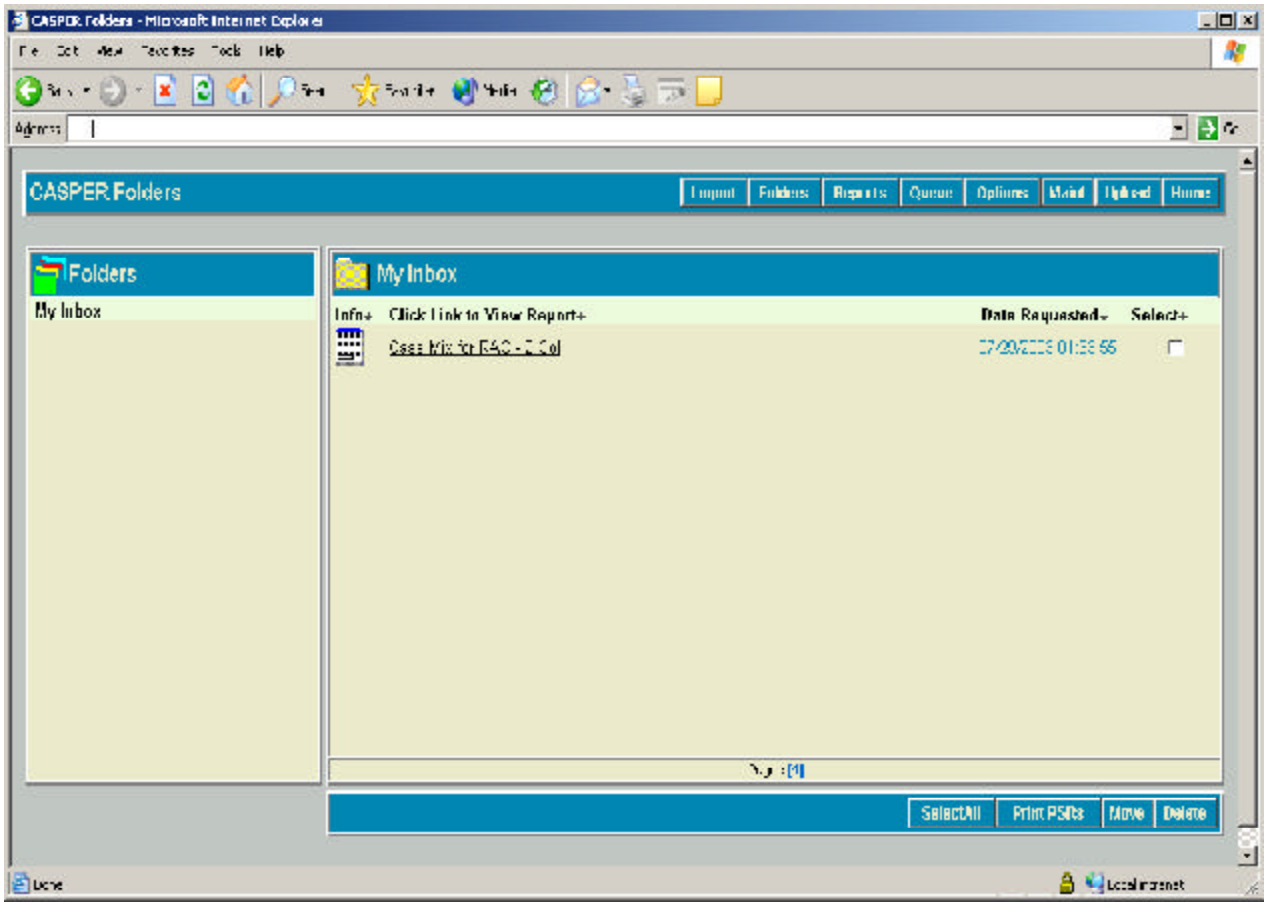


Figure 2-17. CASPER Folders Page

2. In order to view a report, single click on the name of the desired report. (For information regarding the required plug-in, review pages 2-3 through 2-5.)

3. A summary of the report criteria report can be viewed by moving the mouse pointer over the report icon. A pop-up message will display with a brief description of the report criteria. (Figure 2-17.)

4. More detailed information regarding the report criteria can also be displayed by clicking on the report icon. (Figure 2-18.)

Figure 2-18. Report Icon

5. Use the report criteria information as a guide when selecting from a list of multiple reports. When this icon is selected, the following page will display. (Figure 2-19.)

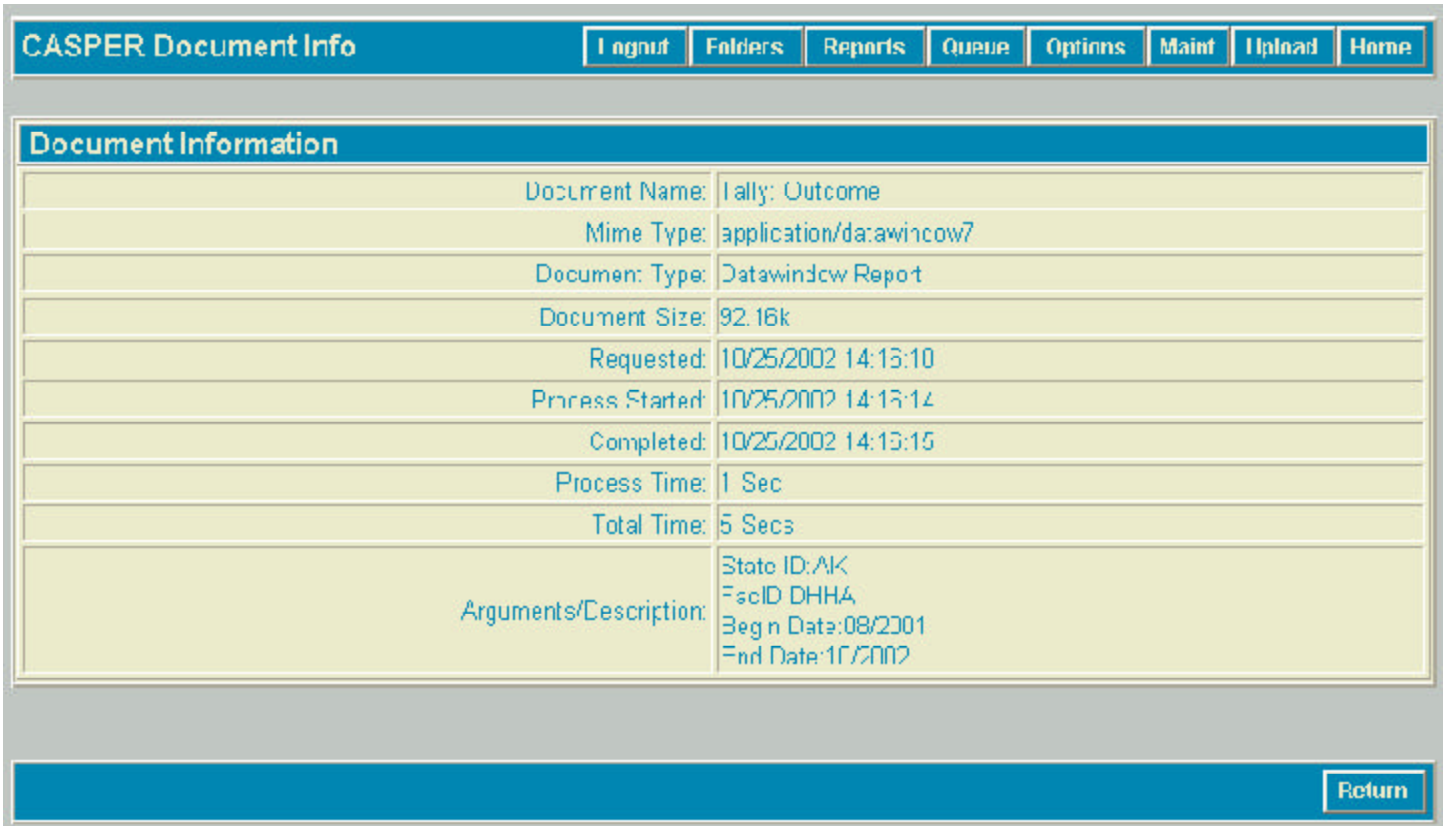


Figure 2-19. CASPER Document Info Page

Internet Explorer Users:

1. Use the Reports tool bar located directly above the report window. This feature is available only with Internet Explorer due to the Active X plug-in capabilities. (Figure 2-20.)

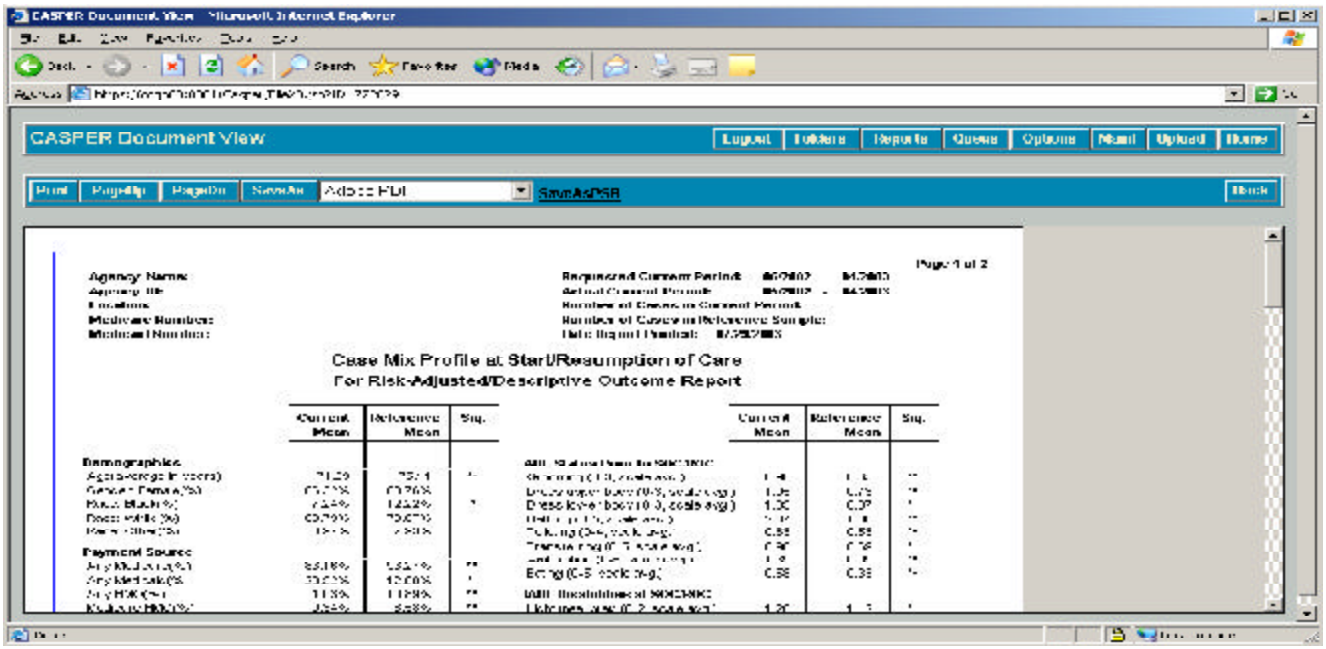


Figure 2-20. Printing, Saving and Exporting Using Internet Explorer

2. To **print** a single report, select the Print button from the reports toolbar shown above. Printing multiple reports is also possible if using the PSR format. To do this, place a check in the "Select" field for each PSR report on the CASPER Folders page to be printed, then select the PrintPSRs button. With either process, the report(s) will automatically be printed to your default printer.

3. To **save** the report, select the desired format from the drop down box. Select the Save As button. **NOTE: Internet Explorer 5.5 SP2 and 6.0 do not support saving reports in thier original format, Powersoft Report (PSR). The IE PSR Viewer described on page 2-31 is available for this process, or users may change the default report format to PDF on the CASPER Options page.**

4. To **export** to a spreadsheet, select Excel (.xls) from the drop down box. Select the Save As button. The browser will display the report in a spreadsheet. To save this information, select the Save As option from the File drop down menu in your browser.

Netscape Users:

1. Netscape user's option to Print or Save Rows remains unchanged from the previous OBQM application. In either case, while viewing a report you must right click anywhere on the report to display these options. The built-in browser tools will not print or save the reports. (Figure 2-21.)

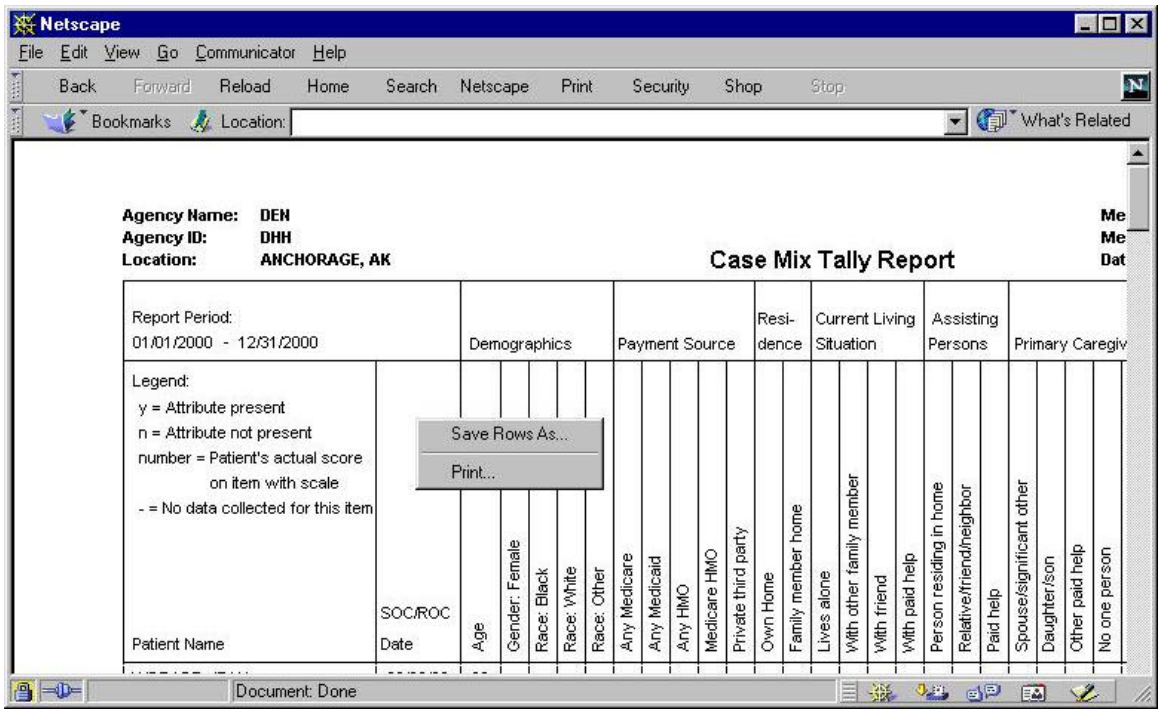


Figure 2-21. Printing, Saving and Exporting Using Netscape

2. To **print**, select the Print option. Your Printer dialog box will display allowing you to finish the print task.

3. To **save** the report, select the Save Rows As option. Save the report as a Powersoft Report (.psr). This file type must be used if original formatting is desired. **NOTE: Use the "drag and drop" method to open a saved .psr report.** To do this, open both Netscape and Windows Explorer. Position the open windows so that both can be seen on the screen. Navigate to and click on the saved file in Windows Explorer, then holding the mouse button drag the file from Windows Explorer to the Netscape window. When the file is positioned over the open Netscape window, release the mouse button.

4. To **export** the report to Excel, select the Save Rows As option. Save the report as an Excel or Excel With Headers file (.xls).

1. The My Inbox folder is the default folder and cannot be deleted. However, you may change the name of this folder, as well as create additional folders by selecting the Maint (Maintenance) button from the CASPER menu bar. The CASPER Maintenance page will display.

2. To create new folders, select the Insert button. Enter the name for the new folder in the blank field under My Inbox. (Figure 2-22.)

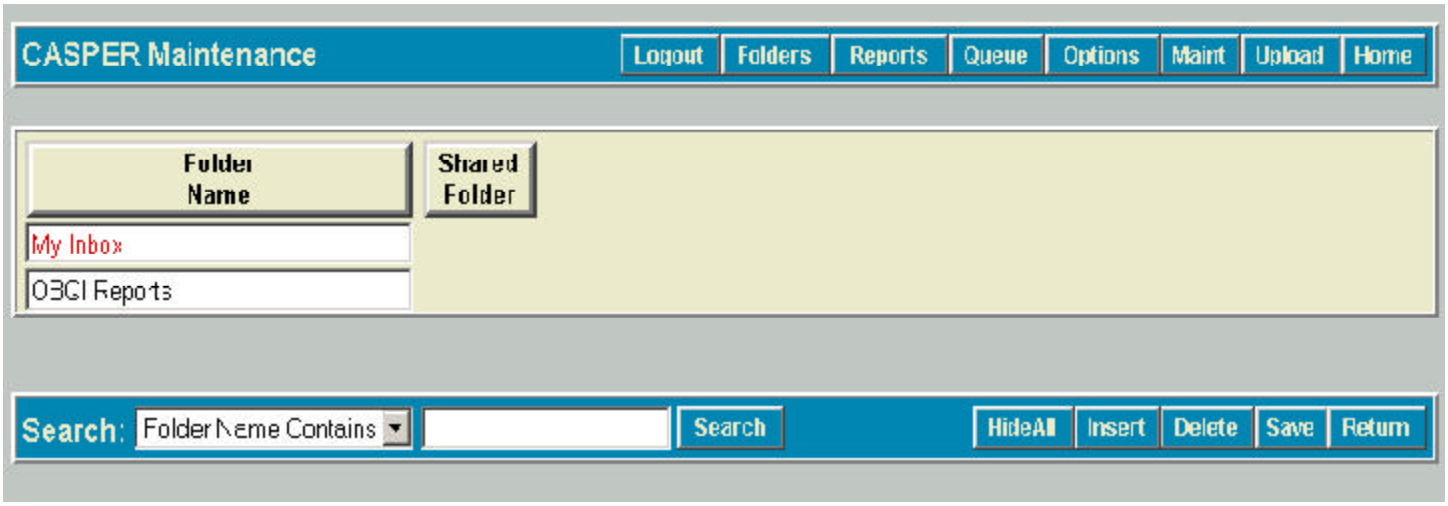


Figure 2-22. CASPER Maintenance Page

3. To save this new folder, select the Save button. To continue, select the Insert button again to create another folder, or the Return button to return to the CASPER Folders page.

4. To move reports from the default folder to your newly created folder, place a check in the box to the far right of the report listing and select the Move button. (Figure 2-23.)

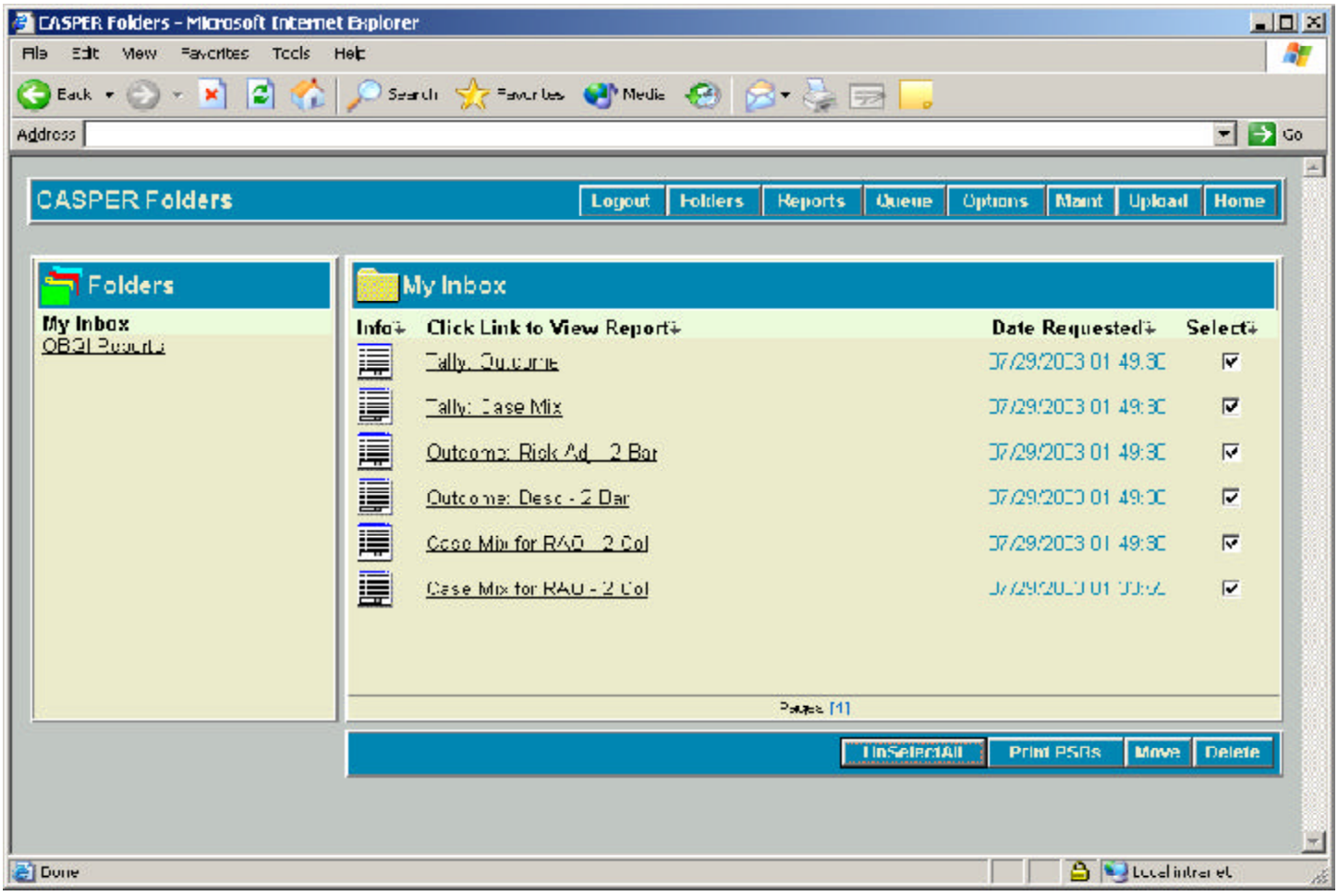


Figure 2-23. CASPER Folders Page - Moving Reports

5. The CASPER Move page will display with a list of the reports that were selected. (Figure 2-24.)

6. Open the drop down box and highlight the folder that the reports should be moved to.

7. From the CASPER Move page, the user may also rename report titles. Simply highlight the title(s) displayed under the Report Name heading and type in the desired name for the report.

8. When all changes are complete, select the Save button to retain the change, then the Return button to return to the CASPER Folders page.

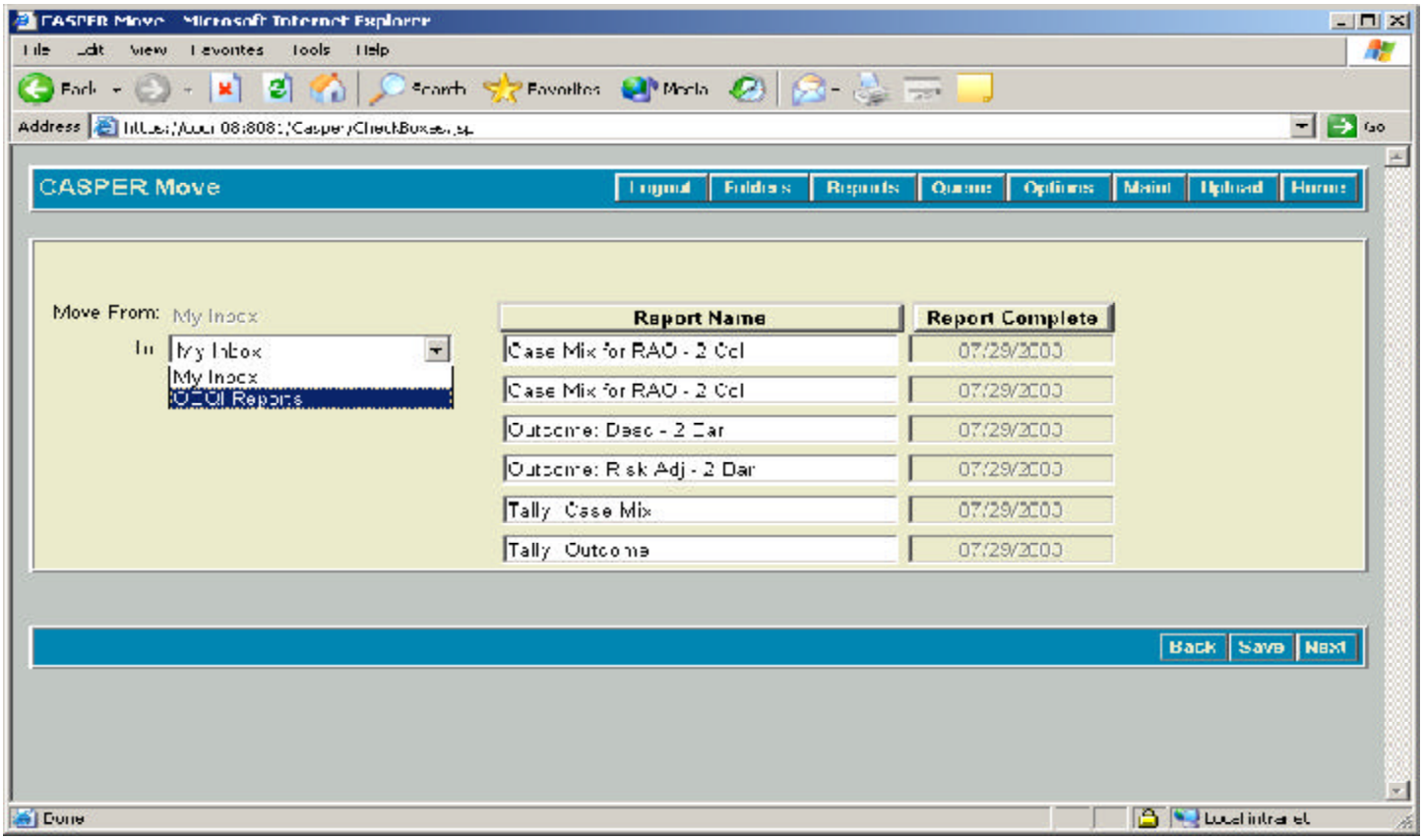


Figure 2-24. CASPER Move Page

9. When returning to the CASPER Folders page, you'll notice that the new folder now contains the reports that were just moved. (Figure 2-25.)

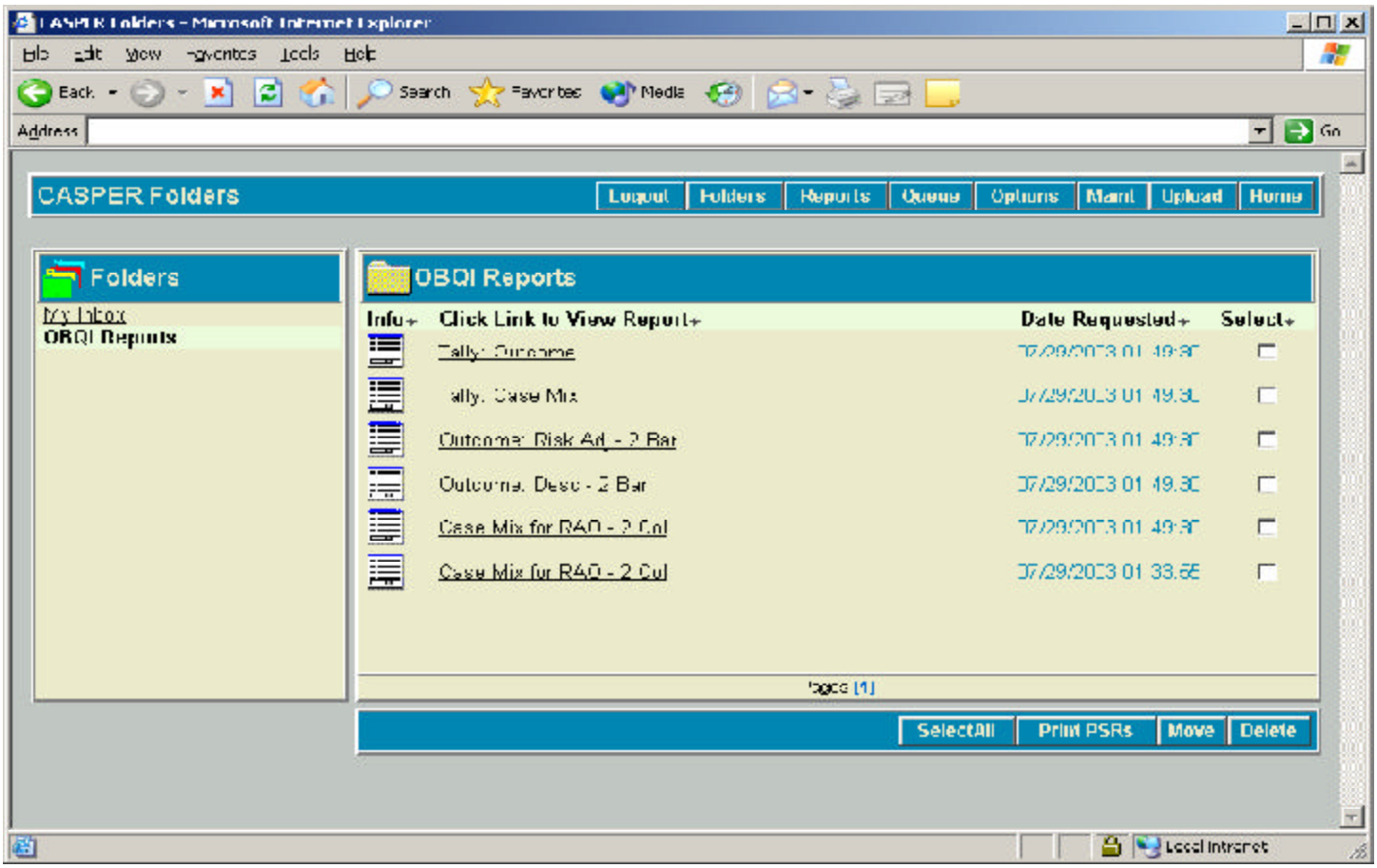


Figure 2-25. Newly Created Folder

10. To delete reports, place a check in the box to the far right of the report listing and select the Delete button.

11. A message will display requesting that the user confirm the delete request. (Figure 2-26.)

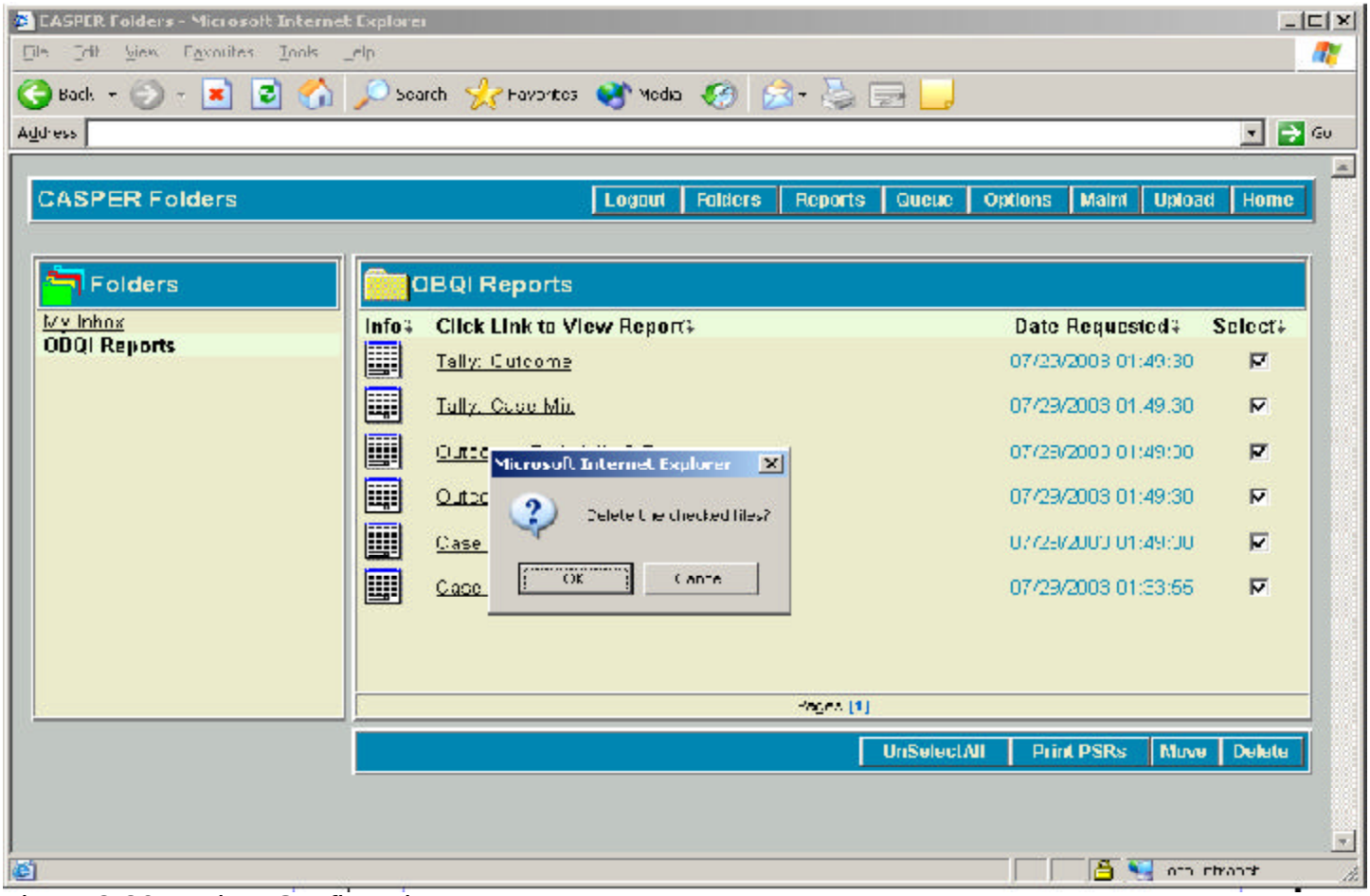


Figure 2-26. Delete Confirmation

12. To continue with the deletion request, select the OK button. The CASPER Delete page will display. (Figure 2-27.)

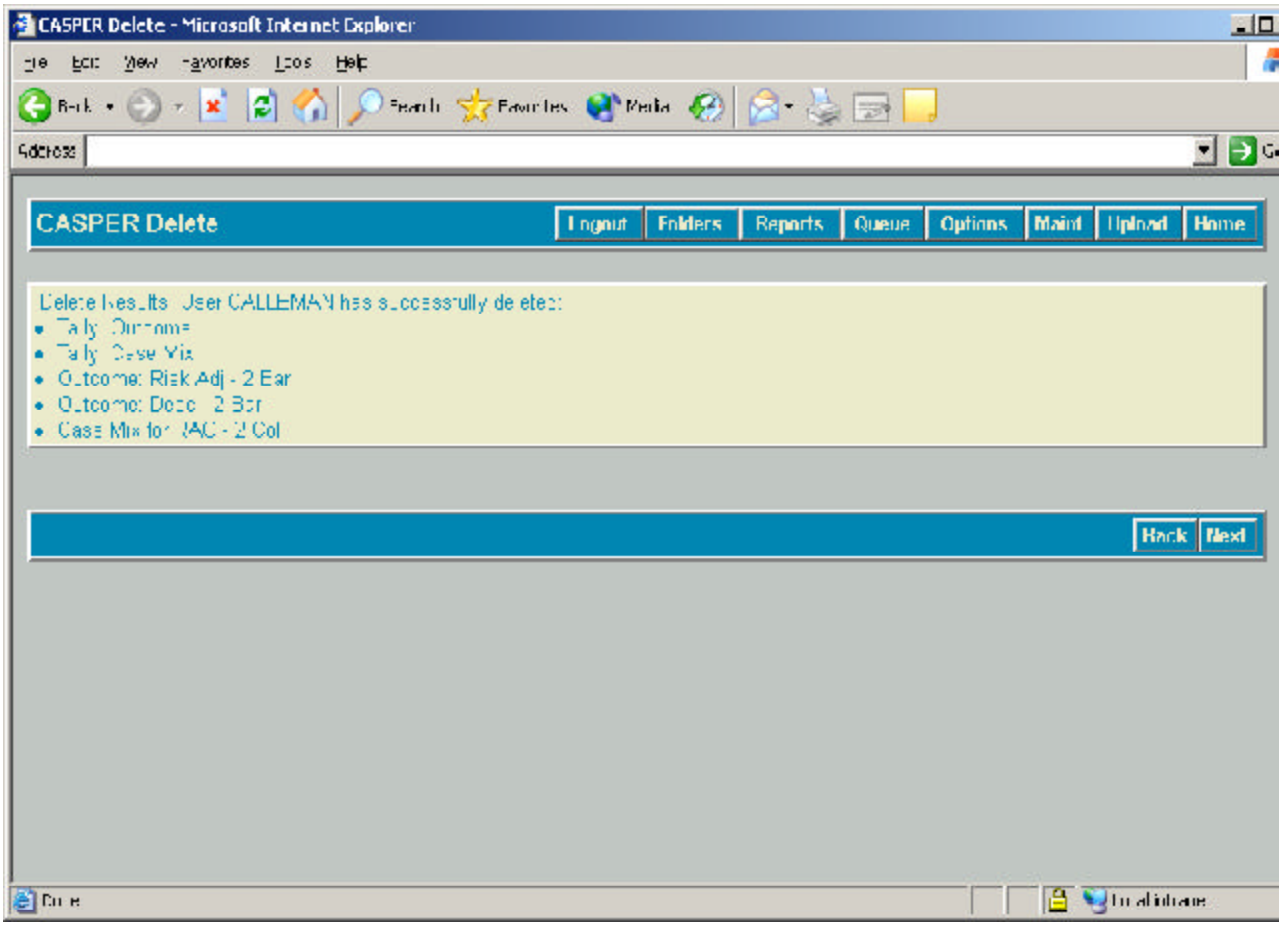


Figure 2-27. CASPER Delete Page

13. To return to the CASPER Folders page, select the Next button.

14. When numerous reports have been requested and delivered to the default folder, additional “pages” will be created and the reports will be accessible via page numbers listed at the bottom of the frame. To alter the number of reports per page that are displayed in the Folders section, and further customize the CASPER Reporting application, select the Options button from the CASPER menu bar. (Figure 2-28.)

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

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

- **Allow Share**: displayed when user has access to Shared Folders, but it cannot be modified. Only a CASPER Reporting Admin can add or remove Shared Folder access.

- **OutputFormat**: allows report requests to be processed in one of the following formats rather than the default format of PSR: PDF, HTML, EXCEL, or TEXT. At this time, only select reports are available for request in alternate formats. The link beside the dropdown box allows users to identify which reports can be requested in alternate formats. If the user preselects a format that is not available for a requested report, the standard default of PSR will be returned.

- **ColorScheme**: allows color customization of the application. Select from choices such as: Footprints, Original, Lavender, Forest, Wood, and Winter.

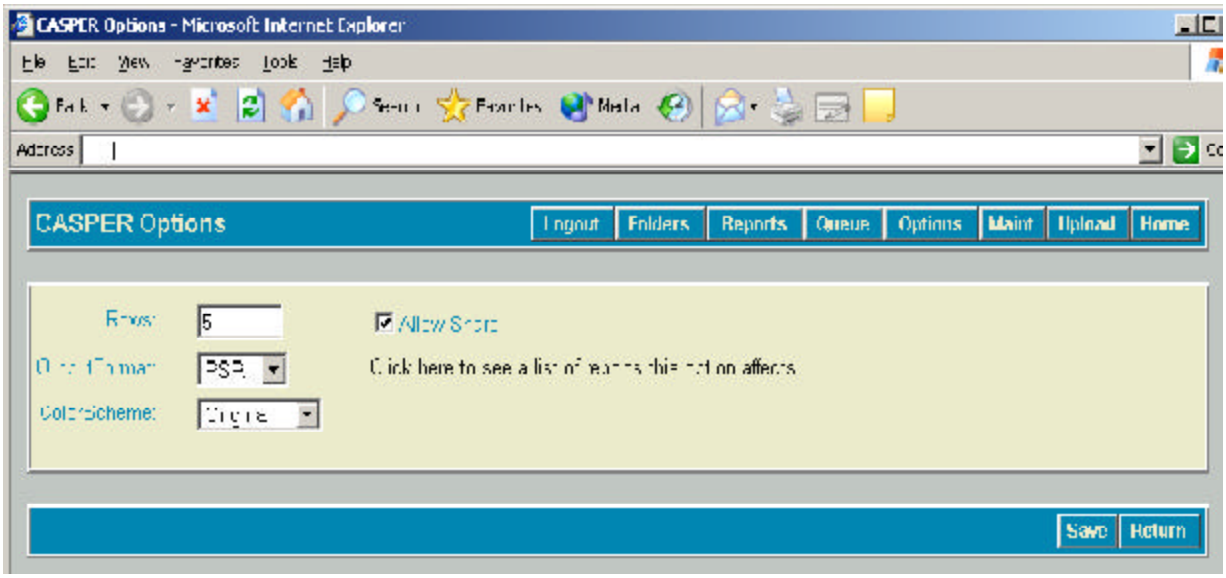


Figure 2-28. CASPER Options Page

1. The CASPER Topics area provides instructions, notices and bulletins, helpful information, and downloadable files pertaining to the CASPER Reporting application. (Figure 2-29.)

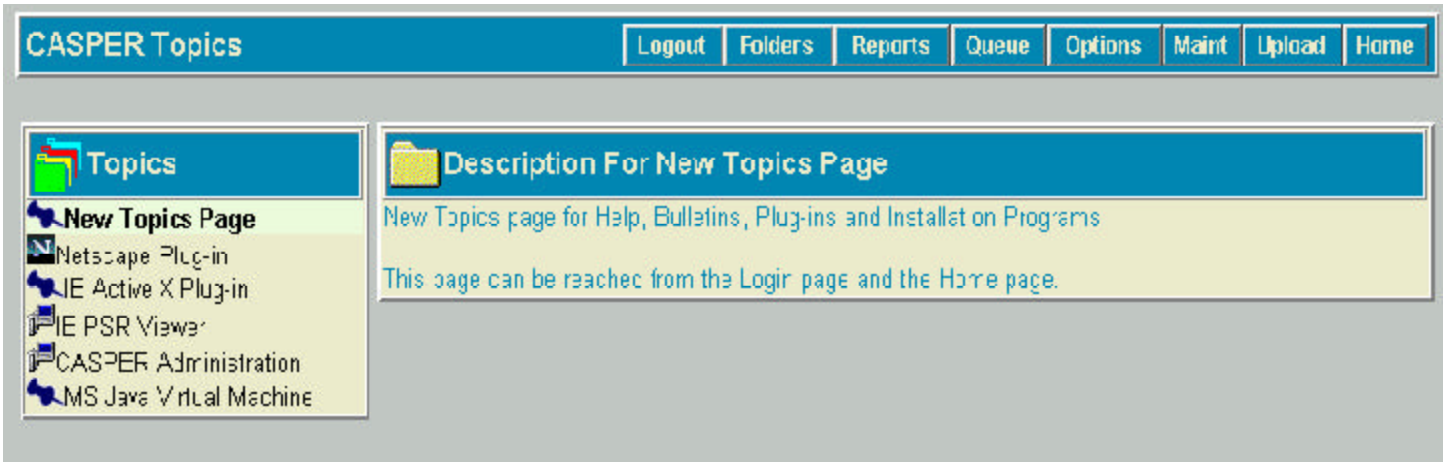


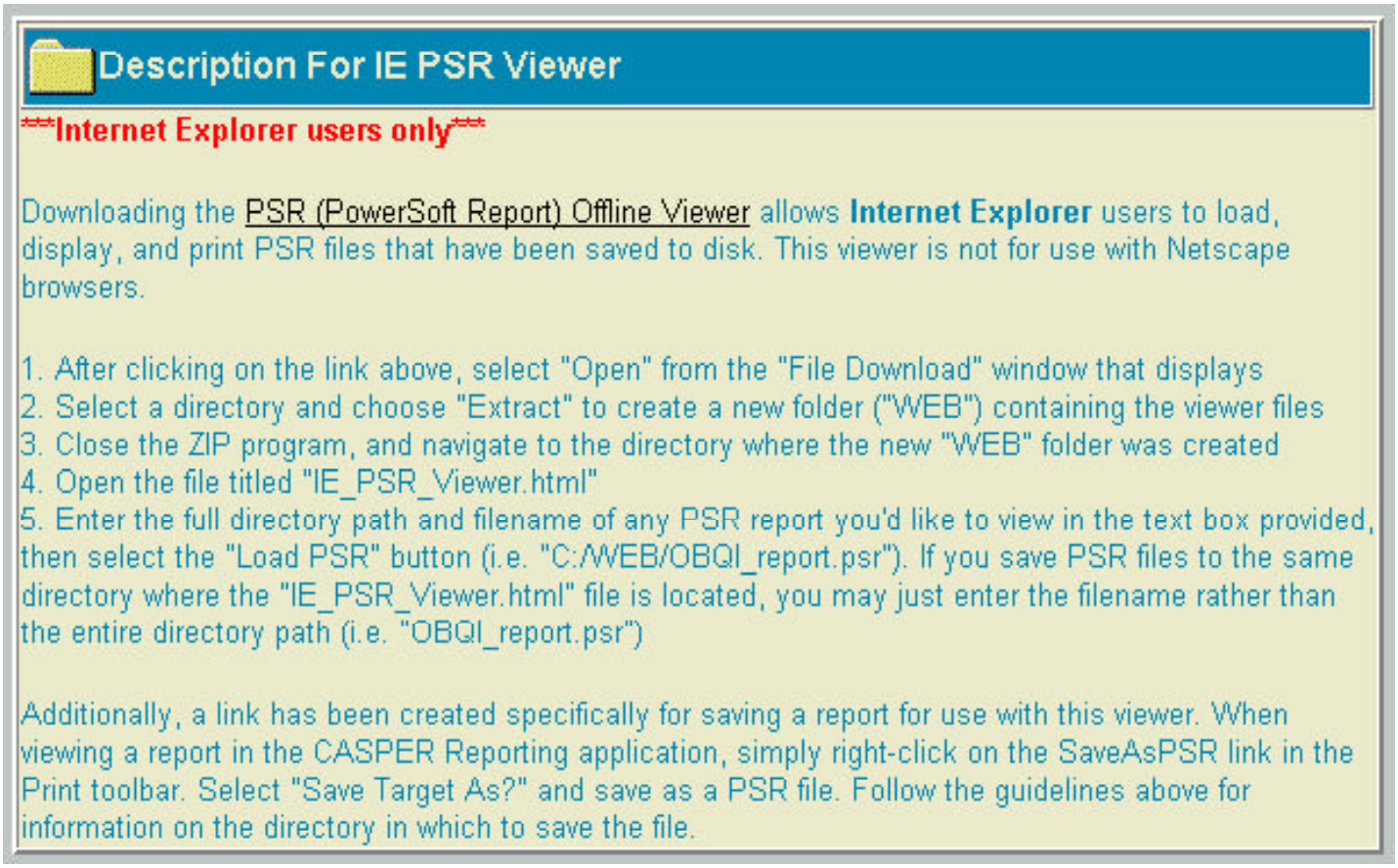
Figure 2-29. CASPER Topics Page

2. To access the CASPER Topics area, select the links available on either the CASPER Login or CASPER Home pages.

Powersoft Report Viewer (IE Only):

1. Due to the inability to save PowerSoft (PSR) report formats in CASPER Reporting while using Internet Explorer versions 5.5 SP2 and higher, a PSR Viewer has been created.

2. To obtain the PSR Offline Viewer, which will allow loading, displaying, and printing of PSR files, follow the instructions posted on the bottom of the CASPER Topics page. (Figure 2-30).



Description For IE PSR Viewer

Internet Explorer users only

Downloading the PSR (PowerSoft Report) Offline Viewer allows **Internet Explorer** users to load, display, and print PSR files that have been saved to disk. This viewer is not for use with Netscape browsers.

1. After clicking on the link above, select "Open" from the "File Download" window that displays
2. Select a directory and choose "Extract" to create a new folder ("WEB") containing the viewer files
3. Close the ZIP program, and navigate to the directory where the new "WEB" folder was created
4. Open the file titled "IE_PSR_Viewer.html"
5. Enter the full directory path and filename of any PSR report you'd like to view in the text box provided, then select the "Load PSR" button (i.e. "C:/WEB/OBQI_report.psr"). If you save PSR files to the same directory where the "IE_PSR_Viewer.html" file is located, you may just enter the filename rather than the entire directory path (i.e. "OBQI_report.psr")

Additionally, a link has been created specifically for saving a report for use with this viewer. When viewing a report in the CASPER Reporting application, simply right-click on the SaveAsPSR link in the Print toolbar. Select "Save Target As?" and save as a PSR file. Follow the guidelines above for information on the directory in which to save the file.

Figure 2-30. PSR Viewer Instructions

3. Additionally, a link has been created specifically for saving a report for use with this viewer. When viewing a report online, simply **right-click** on the SaveAsPSR link in the Print toolbar.

4. Select “Save Target As...” and save as a PSR file. Follow the guide lines provided in the instuctions on the previous page for the directory in which to save the file. (Figure 2-31).

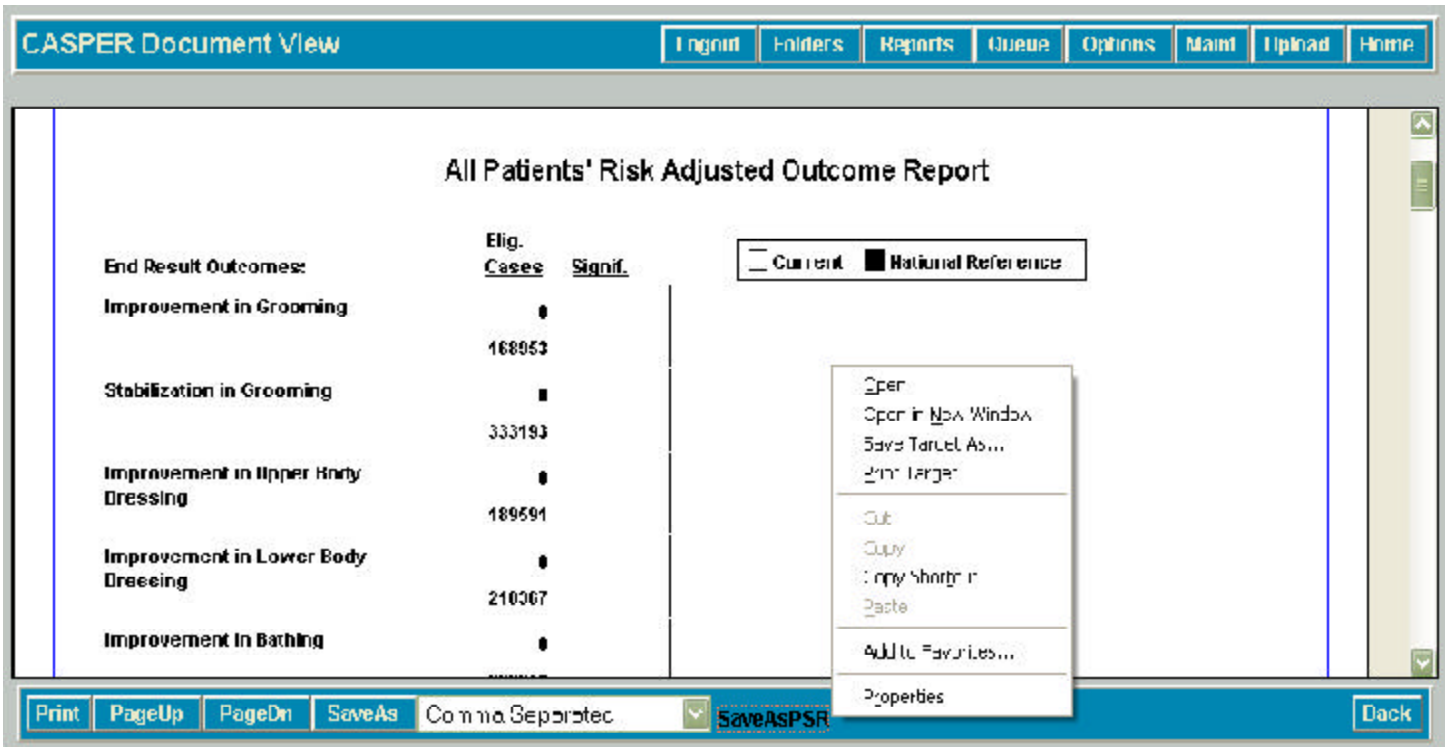


Figure 2-31. SaveAsPSR Link

REPORT SEARCH FEATURE

1. The Report Search feature is available at the bottom of the CASPER Reports page. (Figure 2-32.) This returns a list of reports (only those that the user has access to) matching the search criteria entered.

2. To perform a search, click inside the Report Search textbox and enter the search criteria. Leave the textbox blank to receive a complete list of all reports you have access to.

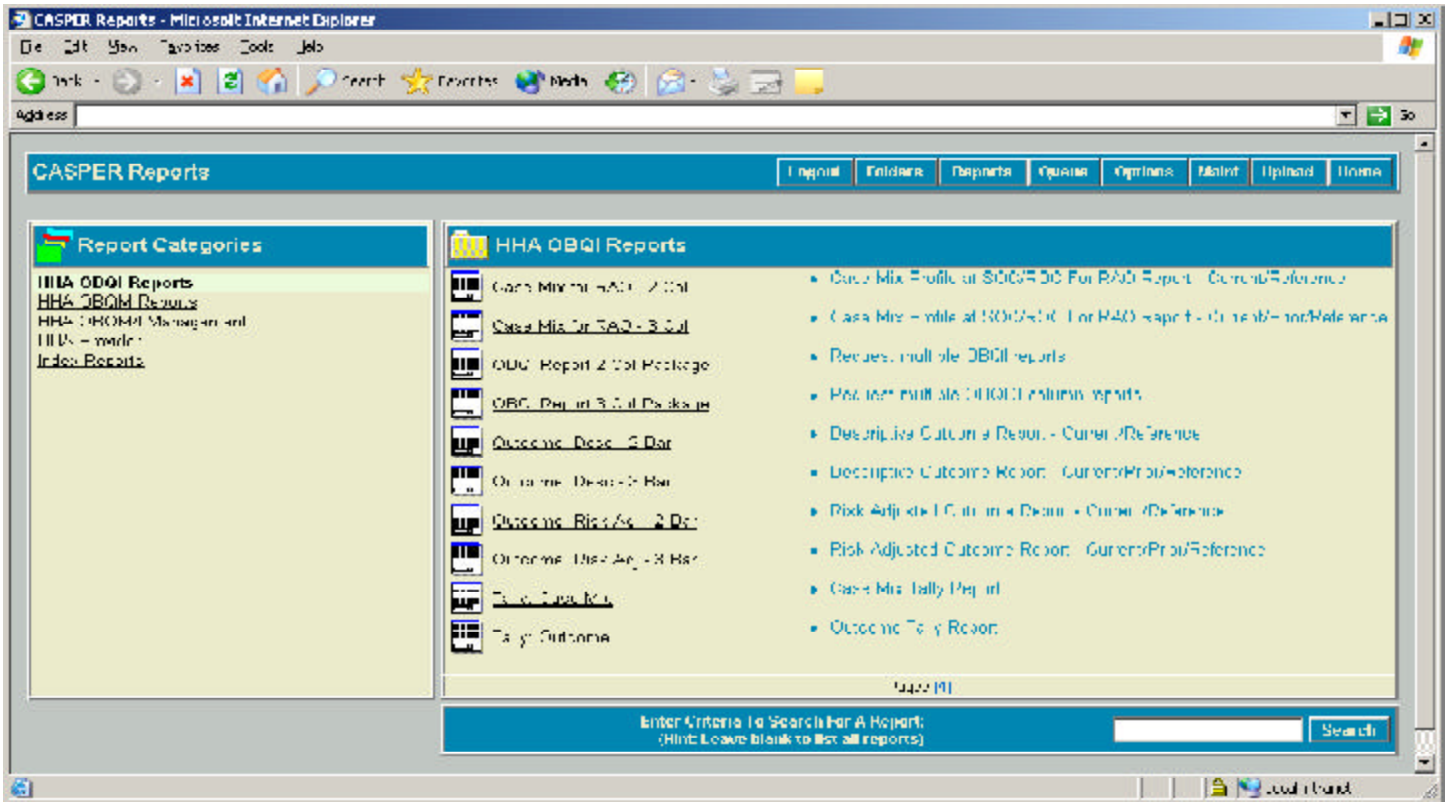


Figure 2-32. Report Search Feature

3. Criteria is matched on Report Category, Report Name, and Report Description. For example, when entering “Outcome” as the search criteria, all reports with a match are displayed. (Figure 2-33.)

4. The user may then click on the report name and be directed to the criteria selection and submission page for that particular report.

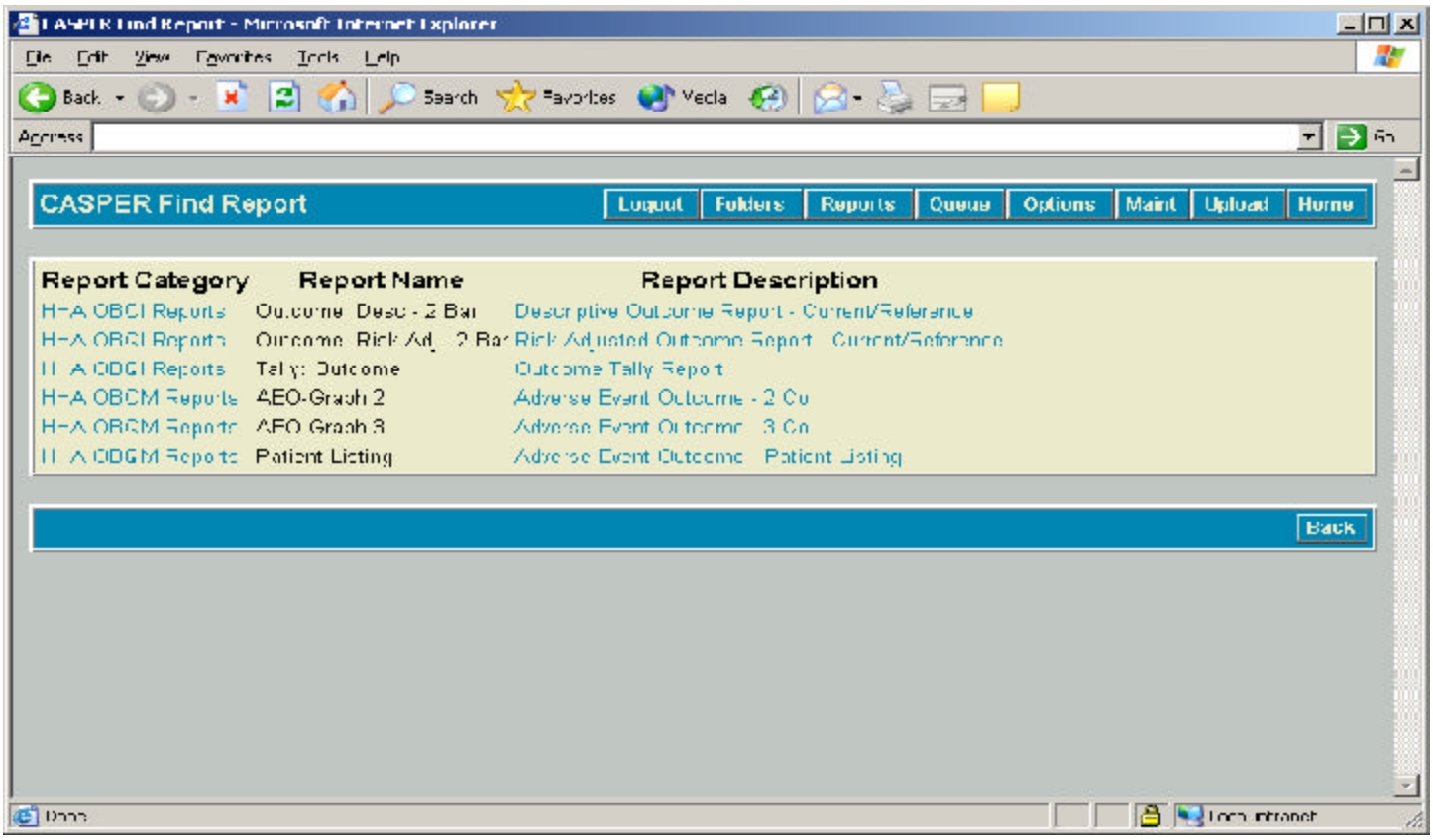


Figure 2-33. Report Search Results