

# Report Groups & Workflows

User Guide

*Prepared for*

**myUnity Essentials Financial**



**Netsmart**

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# Overview

The Report Groups & Work Flow feature allows users to save their frequently used reports for easy access from one central location. The most frequently used reports are available for use with Report Groups. In version 1.2.9.1, additional options have been added to accommodate billing workflow routines. The File > Import/Export (including Payroll export) can also be run from this option.

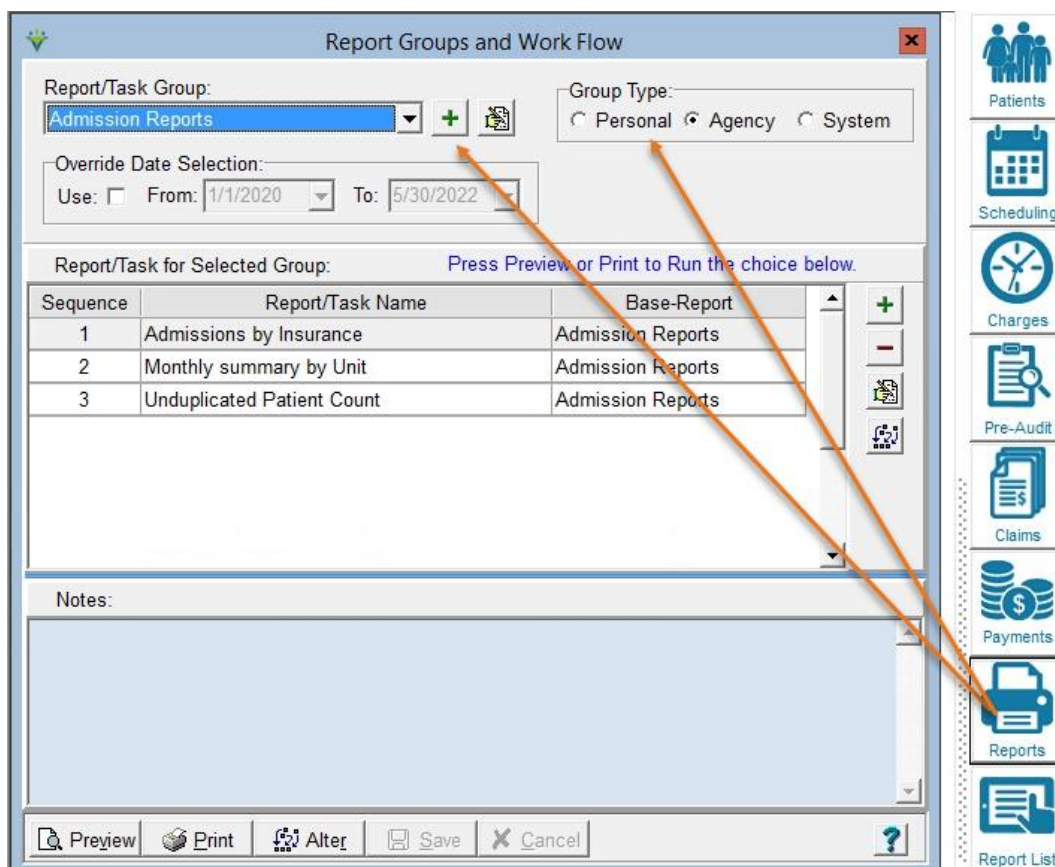
Contact Netsmart Support if you use a report not currently listed here.

## Creating a Report Group

Go to **File > Report Groups** or press the **Reports** button on the right of the myUnity Essentials Financial window. User Security permissions must be granted to access the menu option.

Report Groups are categorized into three types, **Personal**, **Agency** and **System**. Personal groups are only accessible to the individual user who created them. Agency groups are accessible to all users, though they can only be created, edited, or deleted with use of the Master Password. System Groups, provided by Netsmart, are available to anyone with access to the Report Groups menu.

Set the Group Type radio button to **Personal** or **Agency** and press the  button to add a new group.



Report Groups and Work Flow

Report/Task Group: Admission Reports + [trash icon]

Group Type:  Personal  Agency  System

Override Date Selection: Use:  From: 1/1/2020 To: 5/30/2022

Report/Task for Selected Group: Press Preview or Print to Run the choice below.

Sequence	Report/Task Name	Base-Report
1	Admissions by Insurance	Admission Reports
2	Monthly summary by Unit	Admission Reports
3	Unduplicated Patient Count	Admission Reports

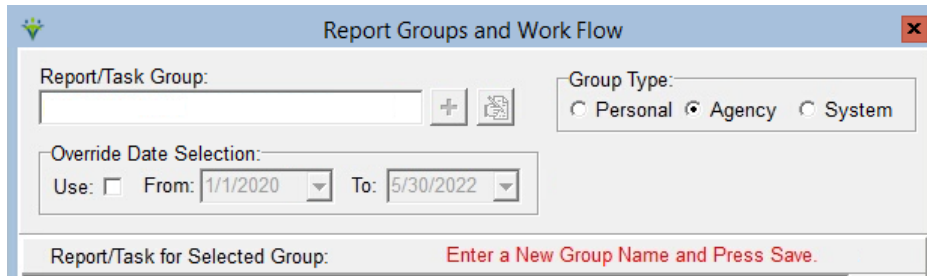
Notes:

Preview Print Alter Save Cancel

Patients Scheduling Charges Pre-Audit Claims Payments Reports Report List


Click **Yes** on the Confirmation window.

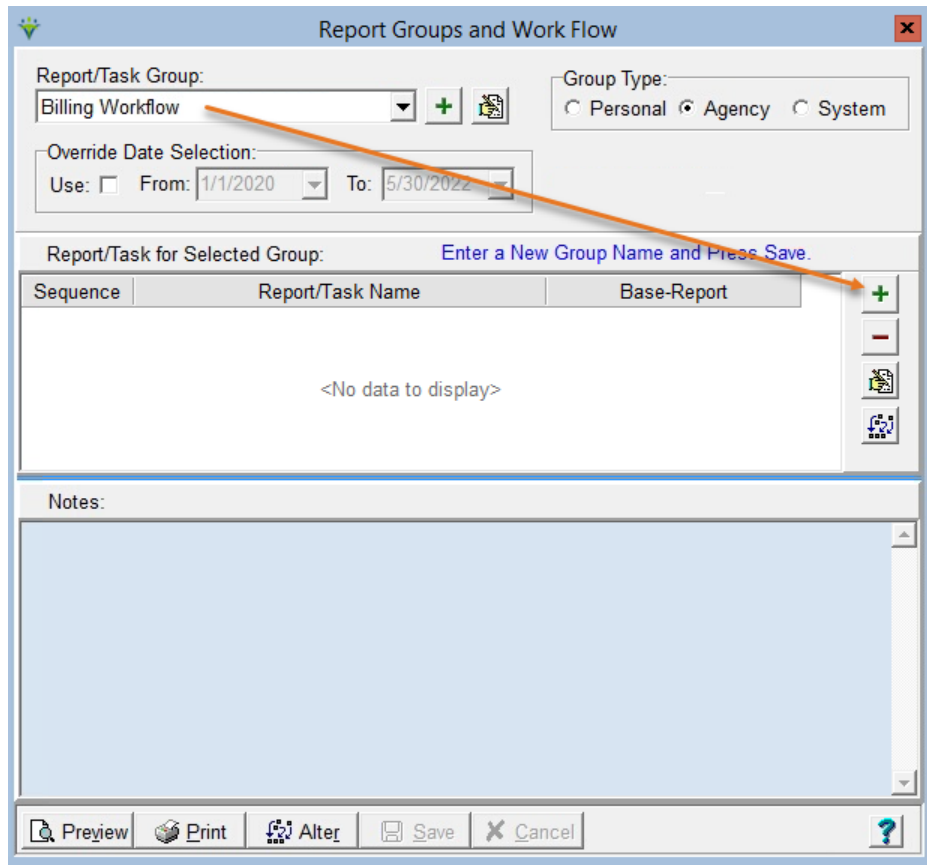
In the **Report Group** box, enter a name for the group and press **Save**.



To change an existing Report Group name, click the  **Edit** button.

### Adding Reports

With the Report Group selected in the dropdown, press the  **Add** button to the right of the **Reports/Task for Selected Group** grid.



Click **Yes** to add a new report to the selected group.

Select a **Base-Report** from the dropdown list and assign a user-defined **Report/Task Name**. For example, if adding a Base-Report choosing the Admission Report to get a list of unduplicated patients,

you may want to assign a Report/Task Name of Unduplicated Patient Count. The Report/Task Name displays in the report header when printed or previewed.

The Base-Report called “Task to Complete” can be used to designate tasks that need to be completed outside of Report Groups (e.g. “Confirm Integration Log has been cleared of Failure & Decline messages.”).

Press **Save** when done.

The screenshot shows the 'Report Groups and Work Flow' window. The 'Report/Task Group' is set to 'Billing Workflow' and the 'Group Type' is 'Agency'. The 'Override Date Selection' is set from '1/1/2020' to '5/30/2022'. Below this, a table lists the 'Report/Task for Selected Group':

Sequence	Report/Task Name	Base-Report
1	Unduplicated Patient Counts	Admission Reports

An orange arrow points from the 'Unduplicated Patient Counts' row in this table to the corresponding report header in the 'Print Preview' window below. The 'Print Preview' window shows the report title 'Unduplicated Patient Counts' and a table of patient data.

Refer	Admit	Admit Count	Disch	Disch Count	Un-Dup Count	Active Count	LOS
<b>Aetna</b>							
Msp, PdgM: 320	12/14/2020	1/14/2021	1		1	1	590
NewYorkEps, Secondary: 381	5/20/2021	3/1/2021	1		1	1	544
NOA22, Msp: 379	5/20/2021	5/20/2022	1		1	1	95

## Editing Reports

To edit a row, press the **Edit** button. Change the **Sequence** field to reorder the report list and press the **Re-sequence Reports** button when done. The **Report/Task Name** can also be changed. The Base-Report selection cannot be switched. Delete it instead if necessary. Each row must be edited individually, pressing **Save** in between. Click the **Edit** button again to change additional rows.

**Notes** can be added when pressing the **Edit** button to edit a row. Notes can be used for a more detailed description of what the report is used for and the data it provides, with a maximum length of 1000 characters. It can also be used to specify the selection criteria used for running the report or to detail the steps of a specified task (select ‘Task To Complete’ as the Base-Report).

*Tip:* click & drag the blue horizontal bar to adjust the size of the Notes field.

Report/Task Group: CA OSHPD Annual Hospice Report

Group Type:  Personal  Agency  System

Override Date Selection:  
Use:  From: 1/1/2020 To: 5/30/2022

Report/Task for Selected Group: Press Preview or Print to Run the choice below.

Sequence	Report/Task Name	Base-Report
1	Section 6 - lines 25-32	Statistical Analysis
2	Section 7 lines 1-13 Male	Admission Reports
3	Section 7 - lines 1-13 Female	Admission Reports
4	Section 7 - lines 15-28 Male	Admission Reports
5	Section 7- Lines 15-28 Female	Admission Reports
6	Section 7 - lines 30-37	Admission Reports
7	Section 7 - lines 40-45	Admission Reports
8	Section 7- lines 50-59(col 2)	Admission Reports
9	Section 7-lines 50-59(col 3-5)	Admission Reports
10	Sect 7- lines 60-76	Statistical Analysis

Notes:  
Visits by Type of Staff. Sequence is Modality. Selection Type is Unit. Select unit(s) on the Specific Includes tab. Uncheck Non Visit Care Types. Billed/Not Billed set to All-Chgs. Report Detail - leave all unchecked. Date Type is Charge Date. Use numbers from the "Actual-Qty" column. Effective 5/31/2022

Preview Print Alter Save Cancel

## Deleting Reports

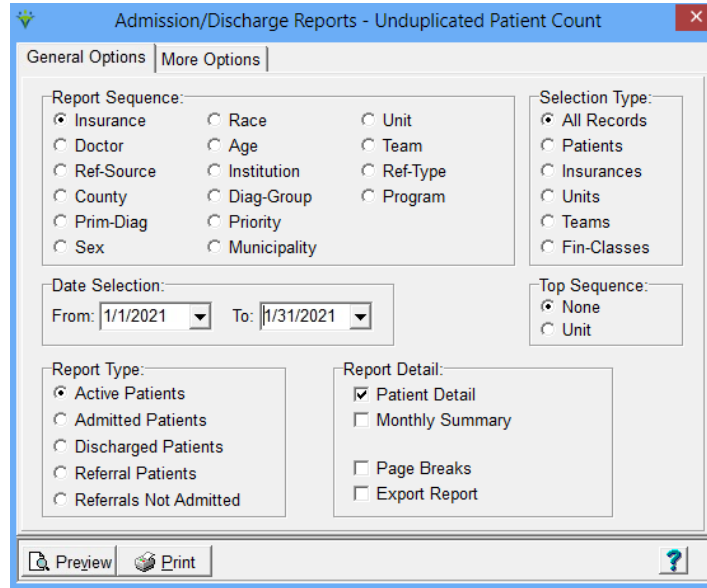
If a report was added to the group in error or should no longer be a part of the group, select the report and press the **Delete** button to remove it. To delete the entire Report Group, press the delete button again and choose "Yes" when prompted to delete the group.

# Running Reports

## Run & Alter Buttons

To specify the report criteria, click the **Alter** button to display the report menu. Specify the desired criteria and press **Print** or **Preview** to view the report. The selections will automatically be saved for use next time.

**Note:** If running the Auto Charge Generation, Billing Pre-Audit, Claim Status, Electronic Claims, Eligibility Realtime, Hospice LOC Report or Import/Export, use the **Run** button. Specify the desired criteria and press **Print** or **Preview** to view the report. Press the **Alter** button to save the selections for use next time.



### Override Date Selection

If running a group of reports for the same date range, the **Override Date Selection** option can be utilized as a time-saving feature. Check the **Use** box and specify the **From** and **To** date range.

These dates supersede those specified via the **Alter** button when the report is run from the Report Groups window. This can be useful if running annual reports such as the Medicare Cost Report.

For reports utilized in posting routines (Auto Charge Generation, Billing Pre-Audit, Electronic Claims, Hospice LOC Report or Import/Export), these dates will carry through to the report window if **Use** is checked.

