Report Groups & Workflows

User Guide

Prepared for

myUnity Essentials Financial

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Table of Contents

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.

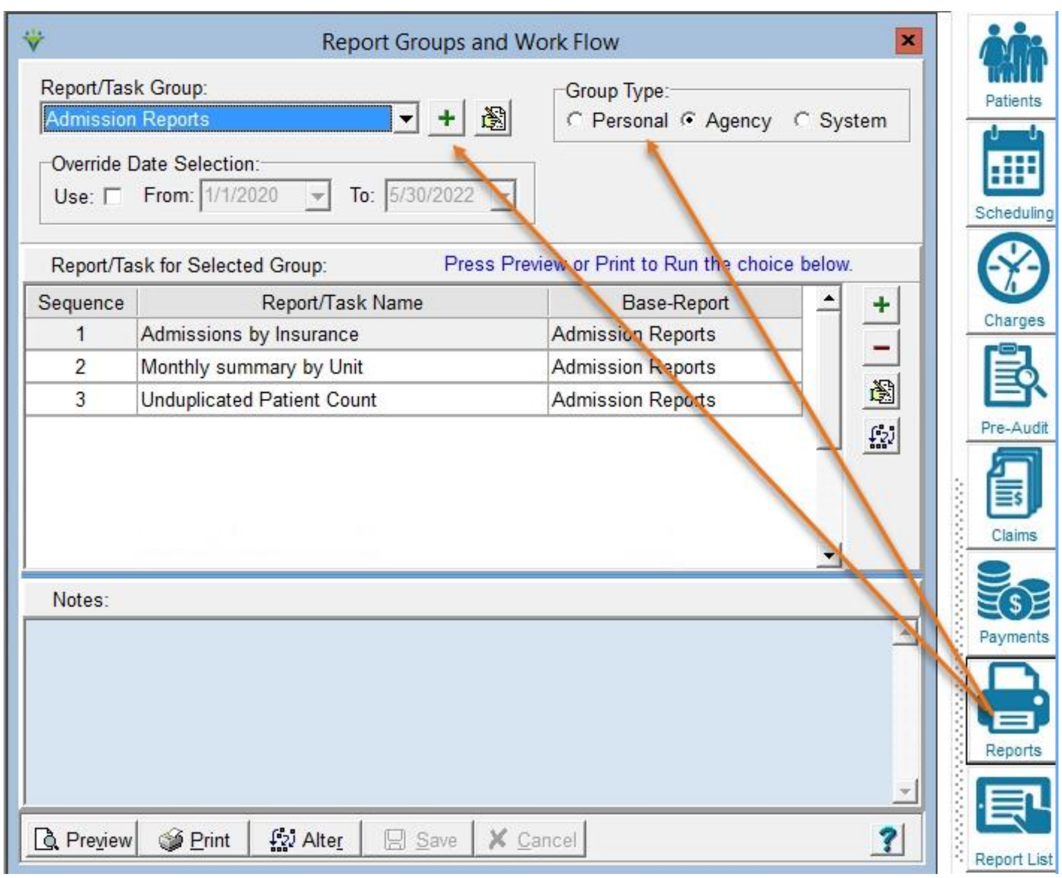
Contact Netsmart Support if you use a report not currently listed here.

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.

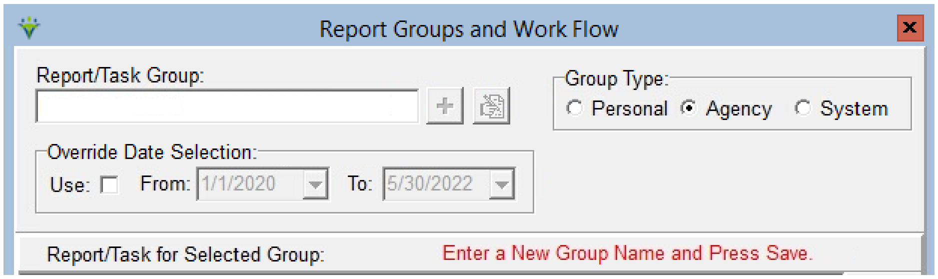
Report Groups are categorized into three types, **Personal**, **Agency** and **System**. Personal groups are only accessible to the individual user who created them. Agency groups are accessible to all users, though they can only be created, edited, or deleted with use of the Master Password. System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



Click **Yes** on the Confirmation window.

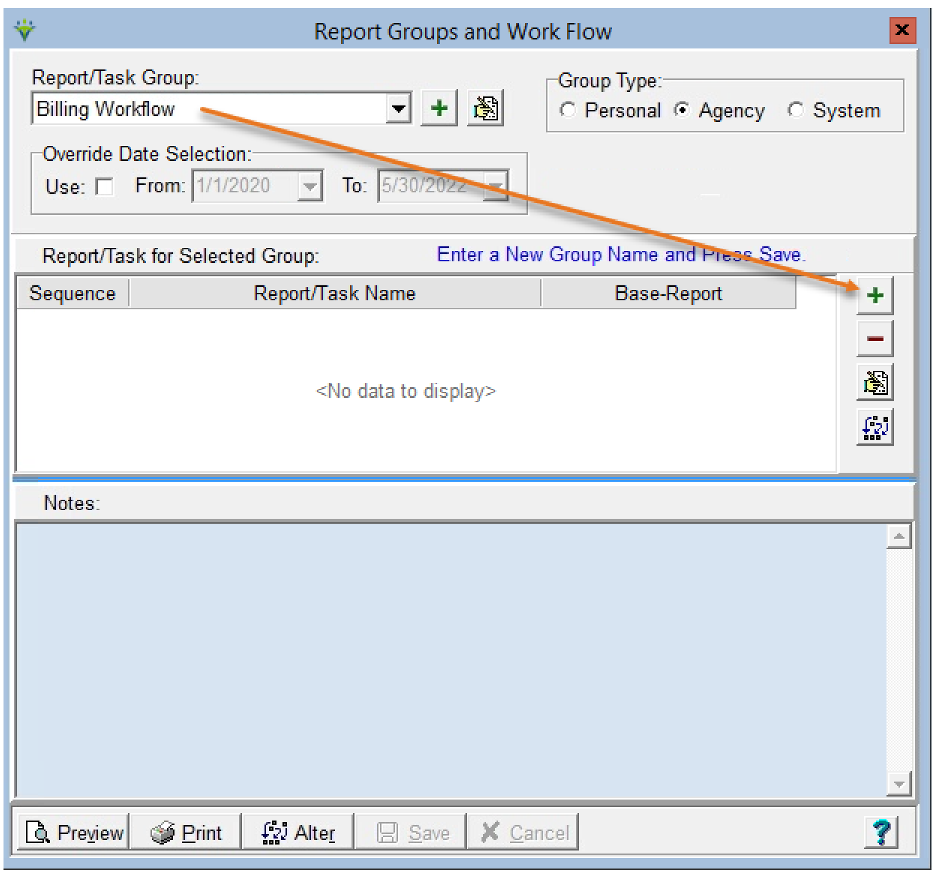
In the **Report Group** box, enter a name for the group and press **Save**.



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.

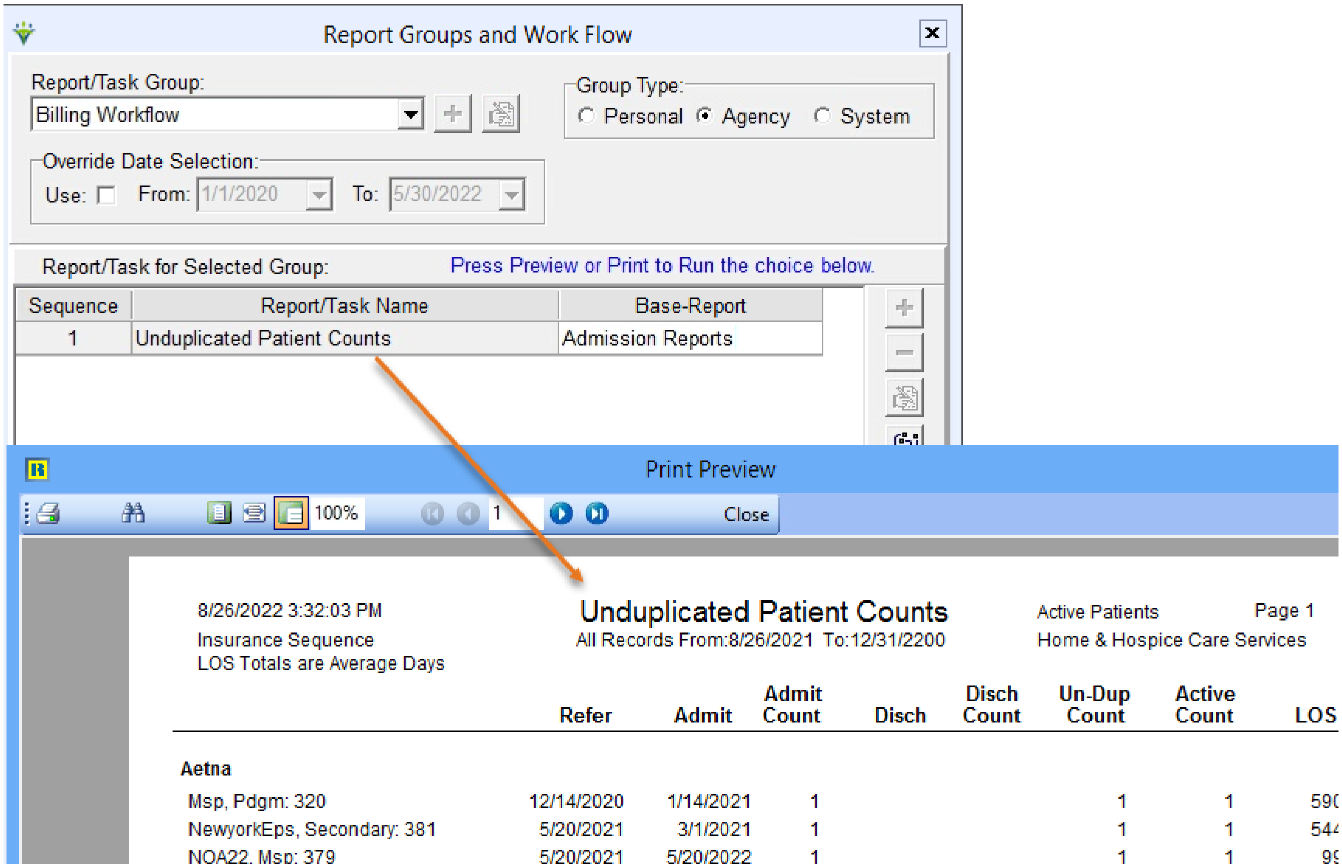


Click **Yes** to add a new report to the selected group.

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.

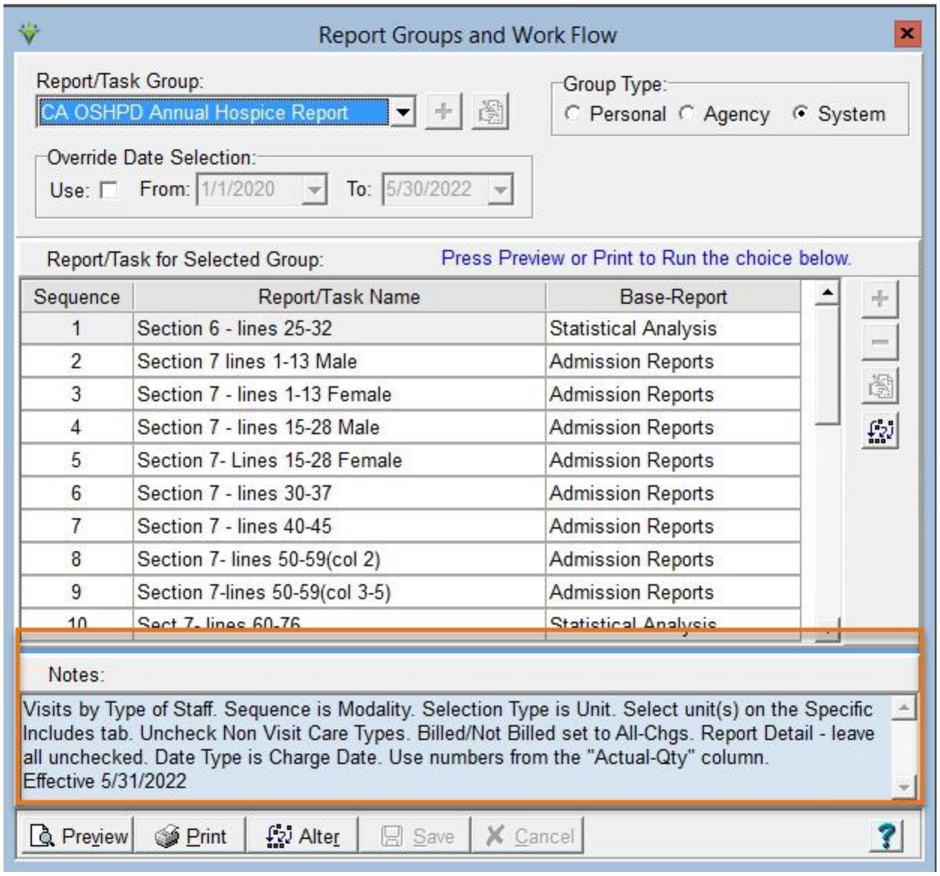


Editing Reports

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.



Deleting Reports

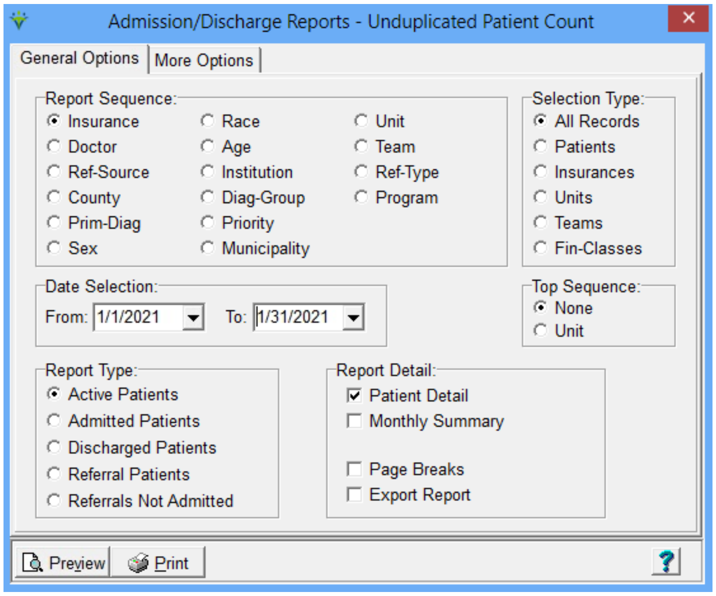
If a report was added to the group in error or should no longer be a part of the group, select the report and press the **Delete** button to remove it. To delete the entire Report Group, press the delete button again and choose "Yes" when prompted to delete the group**.**

Running Reports

Run & Alter Buttons

To specify the report criteria, click the Alter **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 **Run** button. Specify the desired criteria and press **Print** or **Preview** to view the report. Press the Alter **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.