

# Electronic Document Management System (EDMS)

## COLD Reports

Medicaid Information Technology System (MITS)

HP Enterprise Services



Medicaid Information  
Technology System



# EDMS Catalog of Courses

## Business Courses

Introduction to EDMS

Document Preparation, Scanning, and Manual IQC

Correction Processing – Completion: NEW

Quality Assurance – Completion: VERIFY

FileNet One Step Workflow

**COLD Reports**

## Technical Courses

Orientation to FileNet System Administration

Orientation to Captiva System Administration



# Electronic Document Management System

## Course Objectives

1. Summarize the EDMS role as the central document repository for MITS and how EDMS supports the mission of MITS
2. Define COLD Reports, including:
  - The two types of COLD reports
  - How EDMS accesses them and stores them
  - How they are indexed for retrieval
  - How the end user can search for them and view them



# Electronic Document Management System

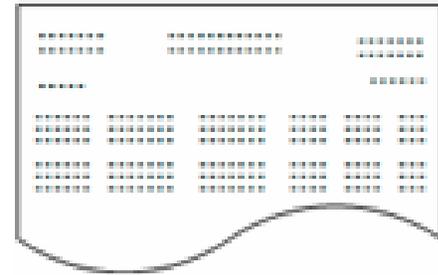
## What are the Components of EDMS?

- EDMS serves as OHP's central document repository for provider and recipient related documentation
- EDMS includes the scanning of paper documents for storage as electronic images, for online viewing by the business user
- EDMS also includes the storage of electronic reports generated by MITS – these are called **COLD Reports** and are the subject of this course



# What Are COLD Reports?

1. These are standard operating reports generated by MITS – daily, weekly, monthly, on request, etc.



2. COLD Reports do not include ad hoc reports that are designed and run ‘on the fly’ — COLD reports are pre-designed, pre-formatted, standard business reports

3. Types of reports include Remittance Advice (RA), Claims Daily History Reports, etc.

4. Collectively, these reports can span many pages per day

# What Are COLD Reports?

5. Any MITS generated report can be flagged by ODJFS to automatically be:
  - Printed, or
  - Moved to EDMS COLD storage

The Report Distribution panel in interChange is where this designation is made. The authority to modify reports on this panel will be restricted.

6. EDMS will provide COLD Report Search panels for users to locate and view the stored reports. COLD reports will be searchable by Report Name, Date, and other data values.



# Questions About COLD Reports

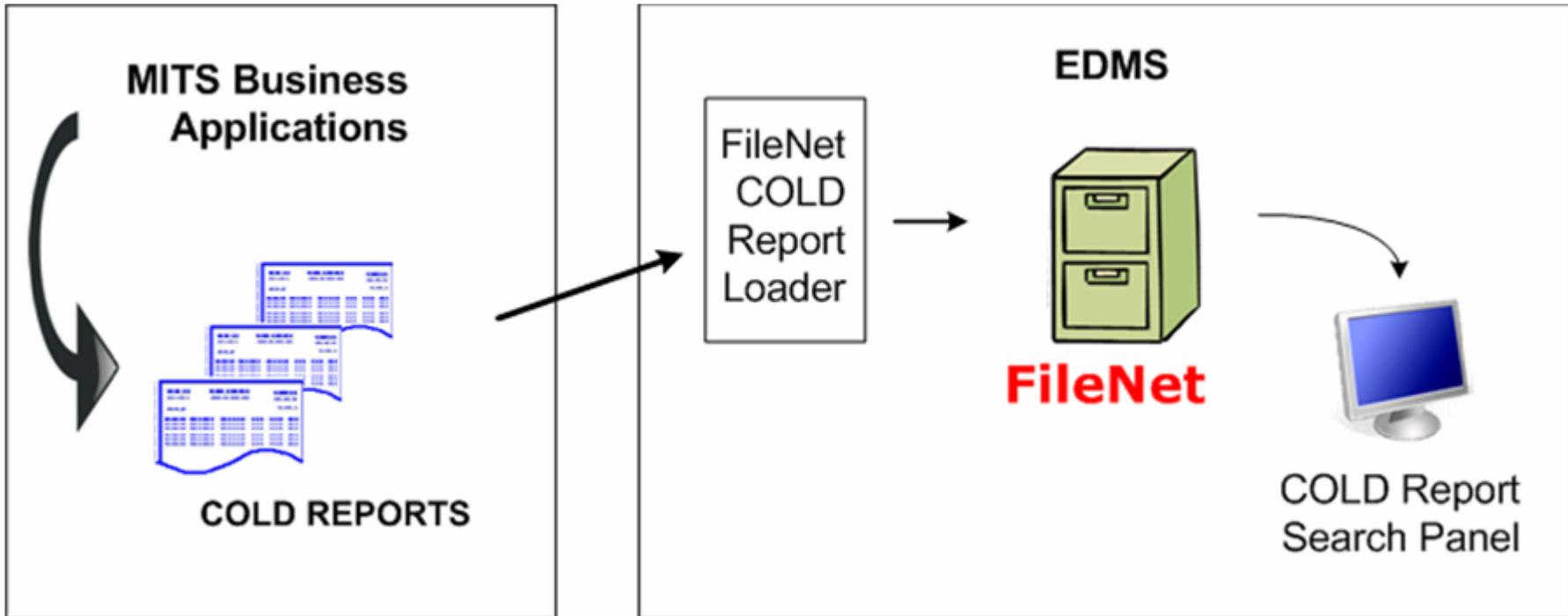
**Q1: How Do COLD Reports Get Into EDMS?**

**A1:** COLD Reports will be transmitted from interChange to EDMS each day

EDMS will store them in text format for user access and long term retention



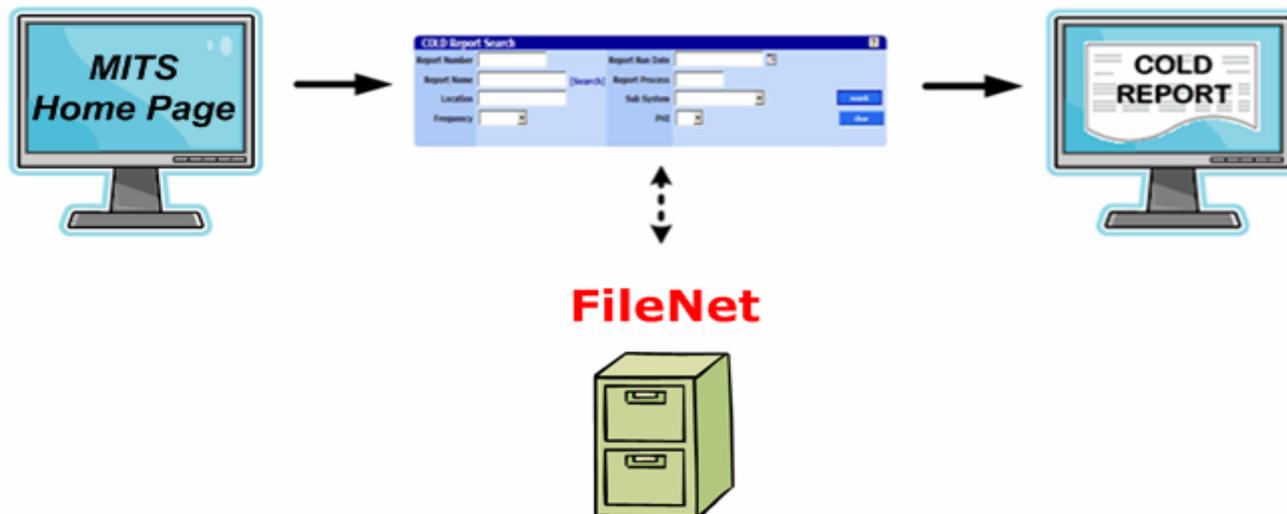
# How EDMS Loads COLD Reports



# Questions About COLD Reports ...

## Q2: How Are COLD Reports Accessed?

**A2:** The MITS Home Page will grant authorized users access to the COLD Report Search panels. (We will look at the Search panels shortly.)



# Questions About COLD Reports ...

## **Q3: Are All COLD Reports Alike?**

**A3:** No. COLD Reports are divided into two categories, within EDMS:

**1. Standard Reports**

(day-to-day operational reports)

**2. RA (Remittance Advice) Reports**



# 1. Standard Reports

Report: TPL-0003-M	MITS	RUN DATE: MM/DD/CCYY
Process: TPLJM009	MEDICAID INFORMATION TECHNOLOGY SYSTEM	RUN TIME: HH:MM:SS
Location: TPLC0170	TPL MONTHLY CASUALTY COMPOSITE	PAGE: 9999
	PERIOD: MM/DD/CCYY - MM/DD/CCYY	

The above is an example of the report header for the Standard Report. This example is a Third Party Liability report called the TPL Monthly Casualty Composite.



# 1. Standard Reports

Report: TPL-0003-M  
Process: TPLJM009  
Location: TPLC0170

MITS  
MEDICAID INFORMATION TECHNOLOGY SYSTEM  
TPL MONTHLY CASUALTY COMPOSITE  
PERIOD: MM/DD/CCYY - MM/DD/CCYY

RUN DATE: MM/DD/CCYY  
RUN TIME: HH:MM:SS  
PAGE: 9999

Below is the COLD Report Search panel for Standard Reports. Some of the search parameters are index fields taken from the report header (yellow). These search fields are the same for all Standard reports.

### COLD Report Search ?

Report Number	<input type="text"/>	Report Run Date	<input type="text"/>
Report Name	<input type="text"/> [Search]	Report Process	<input type="text"/>
Location	<input type="text"/>	Sub System	<input type="text"/>
Frequency	<input type="text"/>	PHI	<input type="text"/>





## 2. Remittance Advice (RA) Reports

Report: CRA-BANN-R  
RA# : 999999999

MITS  
MEDICAID INFORMATION TECHNOLOGY SYSTEM  
PROVIDER REMITTANCE ADVICE  
BANNER MESSAGES

Date: MM/DD/CCYY  
Page: 9,999

XX  
XX  
XX  
XXXXXXXXXXXXXXXXXX, XX XXXXX-XXXX

PROVIDER ID: 9999999999999999  
NPI ID: 9999999999  
TAX ID: XXXX  
ISSUE DATE: MM/DD/CCYY

Below is the COLD Report Search panel for RA Reports. Again, these search fields are the same for all RA reports.

**COLD Report Search** ?

RA Number	<input type="text"/>	Report Run Date	<input type="text"/>
Payee ID	<input type="text"/>	Provider ID	<input type="text"/>
NPI	<input type="text"/>	Sub System	<input type="text"/> ▼
Frequency	<input type="text"/> ▼	PHI	<input type="text"/> ▼
County	<input type="text"/> ▼		



# COLD Report Search Panels

Let us see how the two Search panels operate:

## Standard Reports

**COLD Report Search** ?

Report Number	<input type="text"/>	Report Run Date	<input type="text"/>
Report Name	<input type="text"/> [Search]	Report Process	<input type="text"/>
Location	<input type="text"/>	Sub System	<input type="text"/> ▼
Frequency	<input type="text"/> ▼	PHI	<input type="text"/> ▼

## RA Reports

**COLD Report Search** ?

RA Number	<input type="text"/>	Report Run Date	<input type="text"/>
Payee ID	<input type="text"/>	Provider ID	<input type="text"/>
NPI	<input type="text"/>	Sub System	<input type="text"/> ▼
Frequency	<input type="text"/> ▼	PHI	<input type="text"/> ▼
County	<input type="text"/> ▼		

# Accessing **Standard COLD Reports**

1. From the MITS Home Page, click on COLD Report Search to bring up that panel.

### COLD Report Search ?

Report Number	<input type="text"/>	Report Run Date	<input type="text"/> 
Report Name	<input type="text"/> [Search]	Report Process	<input type="text"/>
Location	<input type="text"/>	Sub System	<input type="text"/>
Frequency	<input type="text"/>	PHI	<input type="text"/>



# Accessing **Standard COLD Reports**

- When key values have been entered and the Search button is pressed, the results appear below the search parameters.

**COLD Report Search** ?

Report Number	<input type="text"/>	Report Run Date	<input type="text"/>
Report Name	<input type="text"/> [Search]	Report Process	<input type="text"/>
Location	<input type="text"/>	Sub System	<input type="text"/>
Frequency	<input type="text"/>	PHI	<input type="text"/>

<<<< 1, 2, 3, 4, 5, 6, 7, 8 >>>>

PDF	EXCEL	WORD	COLD	Report Number	Report Name	Report Process	Report Location	Report Run Date
				EPS-0011-A	CMS-416 ANNUAL EPSDT PARTICIPATION REPORT	EPSJA416	EPA41603	08/28/2009
				CLM-0145-M	ENCOUNTER PHARMACY BATCH SUMMARY	CLMJM145	CLM0145M	06/03/2009
				CLM-0015-D	BUNDLING POTENTIAL HISTORY TO ADJUST	CLMJD015	CLM0015D	01/27/2006
				CLM-0010-D	ON-LINE DAILY ADJUSTMENT REPORT	CLMJD10D	CLM0010D	09/30/2009
				ELG-0050-D	UNLINKING TRANSACTION COUNT REPORT	ELGJD050	ELGPD050	07/10/2006



# Accessing Standard COLD Reports

««« 1, 2, 3, 4, 5, 6, 7, 8 »»»

PDF	EXCEL	WORD	COLD	Report Number	Report Name	Report Process	Report Location	Report Run Date
				EPS-0011-A	CMS-416 ANNUAL EPSDT PARTICIPATION REPORT	EPSJA416	EPA41603	08/28/2009
				CLM-0145-M	ENCOUNTER PHARMACY BATCH SUMMARY	CLMJM145	CLM0145M	06/03/2009
				CLM-0015-D	BUNDLING POTENTIAL HISTORY TO ADJUST	CLMJD015	CLM0015D	01/27/2006
				CLM-0010-D	ON-LINE DAILY ADJUSTMENT REPORT	CLMJD10D	CLM0010D	09/30/2009
				ELG-0050-D	UNLINKING TRANSACTION COUNT REPORT	ELGJD050	ELGPD050	07/10/2006

- On the left of the results portion of the panel, you see the various formats you can use to view for each report.
- Click on an icon ([PDF](#), [Excel](#), [Word](#)) and the report can immediately be opened in that format, based on the presence of that software on the user's PC – it can then be saved in that format on the user's PC if desired.
- The [COLD](#) column icon, when clicked, opens the report in text format, similar to a Notepad display.

# Accessing Standard COLD Reports

◀◀ 1, 2, 3, 4, 5, 6, 7, 8 ▶▶

PDF	EXCEL	WORD	COLD	Report Number	Report Name	Report Process	Report Location	Report Run Date
				EPS-0011-A	CMS-416 ANNUAL EPSDT PARTICIPATION REPORT	EPSJA416	EPA41603	08/28/2009
				CLM-0145-M	ENCOUNTER PHARMACY BATCH SUMMARY	CLMJM145	CLM0145M	06/03/2009
				CLM-0015-D	BUNDLING POTENTIAL HISTORY TO ADJUST	CLMJD015	CLM0015D	01/27/2006
				CLM-0010-D	ON-LINE DAILY ADJUSTMENT REPORT	CLMJD10D	CLM0010D	09/30/2009
				ELG-0050-D	UNLINKING TRANSACTION COUNT REPORT	ELGJD050	ELGPD050	07/10/2006

**NOTE:** Opening a COLD Report in [Excel](#) will not enable the user to manipulate numeric data in individual cells in the spreadsheet.

Excel will open the text file with each report line in column A. The user will have to manually move the data into individual cells to do any numeric operations.

# Accessing RA COLD Reports

The same process exists with the RA COLD Report Search screen - the results appear below the search parameters.

**COLD Report Search** ?

RA Number	<input type="text"/>	Report Run Date	<input type="text"/>
Payee ID	<input type="text"/>	Provider ID	<input type="text"/>
NPI	<input type="text"/>	Sub System	<input type="text"/>
Frequency	<input type="text"/>	PHI	<input type="text"/>
County	<input type="text"/>		

««« 1, 2, 3 »»»

PDF	EXCEL	WORD	COLD	RA Number	RA Run Date	Payee ID	Provider ID	Provider NPI	Frequency	County
				12458796	20090707		12476985	54348699		
				145444674	20091010		12433555	12468556		
				1453789642	20090707		1459753948	4257893		
				123784597865	20090303		57989468613	45475455444		
				12345678	20090715		749844846489	456784167567		



# COLD Report Search Panels

For both types of report, the results displayed from the Search will satisfy all key values entered by the user.

**COLD Report Search** ?

RA Number	<input type="text"/>	<b>Report Run Date</b>	<input type="text" value="20090715"/>	<input type="button" value="calendar"/>
Payee ID	<input type="text"/>	Provider ID	<input type="text"/>	
NPI	<input type="text"/>	Sub System	<input type="text"/>	<input type="button" value="search"/>
Frequency	<input type="text"/>	PHI	<input type="text"/>	<input type="button" value="clear"/>
County	<input type="text"/>			

◀◀◀ 1, 2, 3 ▶▶▶

PDF	EXCEL	WORD	COLD	RA Number	RA Run Date	Payee ID	Provider ID	Provider NPI	Frequency	County
				1453789642	20090715		1459753948	4257893		
				123784597865	20090715		57989468613	45475455444		
				12345678	20090715		749844846489	456784167567		



# COLD Report Search Panels

Here is an example of an RA Report search where a Wildcard ‘%’ was entered as a key value. All RA reports on file will be shown in this instance.

**COLD Report Search** ?

RA Number	<input type="text" value="%"/>	Report Run Date	<input type="text"/>	<input type="button" value="search"/>
Payee ID	<input type="text"/>	Provider ID	<input type="text"/>	<input type="button" value="clear"/>
NPI	<input type="text"/>	Sub System	<input type="text"/>	
Frequency	<input type="text"/>	PHI	<input type="text"/>	
County	<input type="text"/>			

◀◀◀ 1, 2, 3 ▶▶▶

PDF	EXCEL	WORD	COLD	RA Number	RA Run Date	Payee ID	Provider ID	Provider NPI	Frequency	County
				12458796	20090707		12476985	54348699		
				145444674	20091010		12433555	12468556		
				1453789642	20090707		1459753948	4257893		
				123784597865	20090303		57989468613	45475455444		
				12345678	20090715		749844846489	456784167567		



# COLD Report Search Panels

If the index value(s) entered by the user do not result in any reports that satisfy them, 'No results found' is displayed below the Search panel.

### COLD Report Search ?

Report Number	<input type="text" value="XYZ"/>	Report Run Date	<input type="text"/>	
Report Name	<input type="text"/>	Report Process	<input type="text"/>	
Location	<input type="text"/>	Sub System	<input type="text"/>	
Frequency	<input type="text"/>	PHI	<input type="text"/>	

[Search]

No results found

# COLD Report Search Panels

Some search fields have dropdown boxes --

The screenshot shows a search interface titled "COLD Report Search" with a help icon in the top right. The interface is divided into two columns of search fields. The left column contains: RA Number (text input), Payee ID (text input), NPI (text input), Frequency (dropdown menu), and County (dropdown menu). The right column contains: Report Run Date (text input with a calendar icon), Provider ID (text input), Sub System (dropdown menu), and PHI (dropdown menu). On the far right, there are two blue buttons: "search" and "clear".

Frequency:

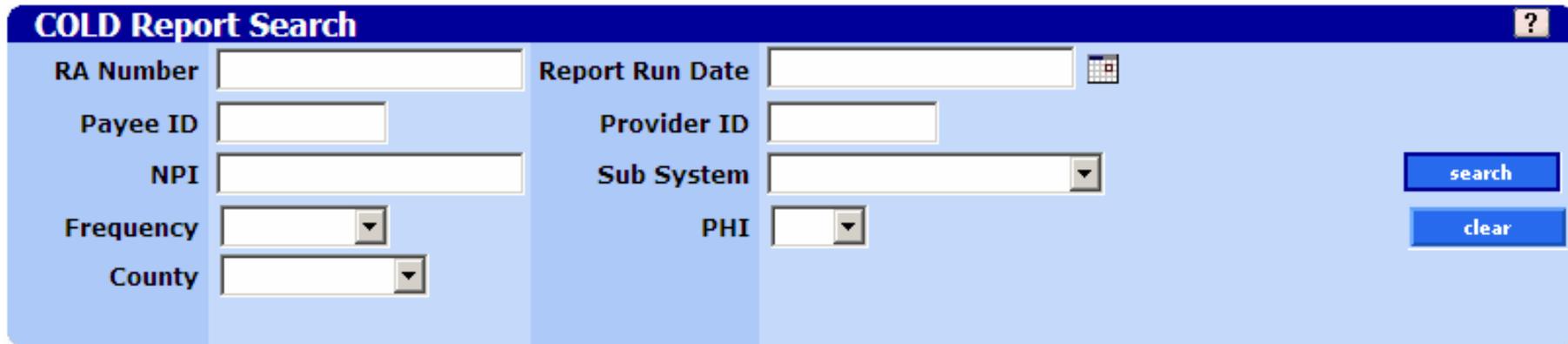
Daily, Weekly,  
Monthly, Quarterly,  
Yearly

County:

All 88 Ohio counties are displayed. Note: only EPSDT reports (5 of them) have County as an index field.

# COLD Report Search Panels

More dropdown boxes --



The screenshot shows a search panel titled "COLD Report Search" with a help icon in the top right corner. The panel is divided into two columns of search criteria. The left column includes: RA Number (text input), Payee ID (text input), NPI (text input), Frequency (dropdown menu), and County (dropdown menu). The right column includes: Report Run Date (text input with a calendar icon), Provider ID (text input), Sub System (dropdown menu), and PHI (dropdown menu). At the bottom right of the panel are two buttons: "search" and "clear".

## Sub System:

A list of each MITS subsystem -  
examples: CT-CTMS  
FI-Financial  
CL-Claims etc.

## PHI:

Yes or No - indicates whether the user making the search request is authorized to view reports containing Protected Health Information (PHI)



HP Enterprise Services  
50 W. Town Street  
Suite 100  
Columbus, OH 43215

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