ILLINOIS
MENTAL HEALTH COLLABORATIVE
FOR ACCESS AND CHOICE

Provider Guide to IntelligenceConnect For Reporting

November 06, 2014

www.illinoismentalhealthcollaborative.com

IntelligenceConnect allows providers/submitters to access reports and data sets directly from the Collaborative's system through our website. This feature does not require special software.

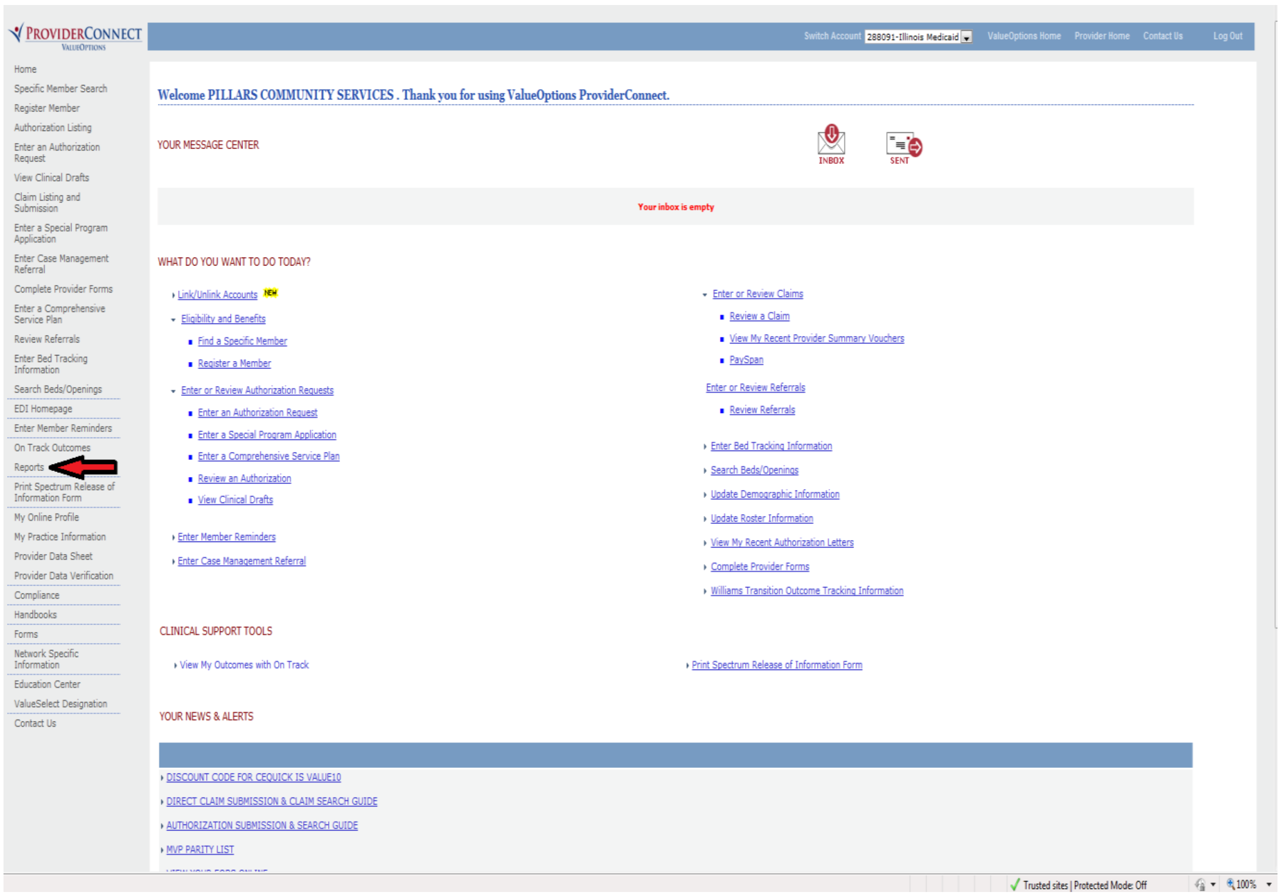
An upgrade to IntelligenceConnect was implemented in late September, 2013. This upgrade includes changes to the interface, its usage and improved performance.

If you have questions or need technical guidance regarding the reports that are available on IntelligenceConnect, contact the e-Support Helpdesk at (888) 247-9311. You may also email the helpdesk directly at e-supportservices@valueoptions.com.

Questions that are out of the scope for the e-Support Helpdesk will be forwarded to the Collaborative reporting staff for resolution.

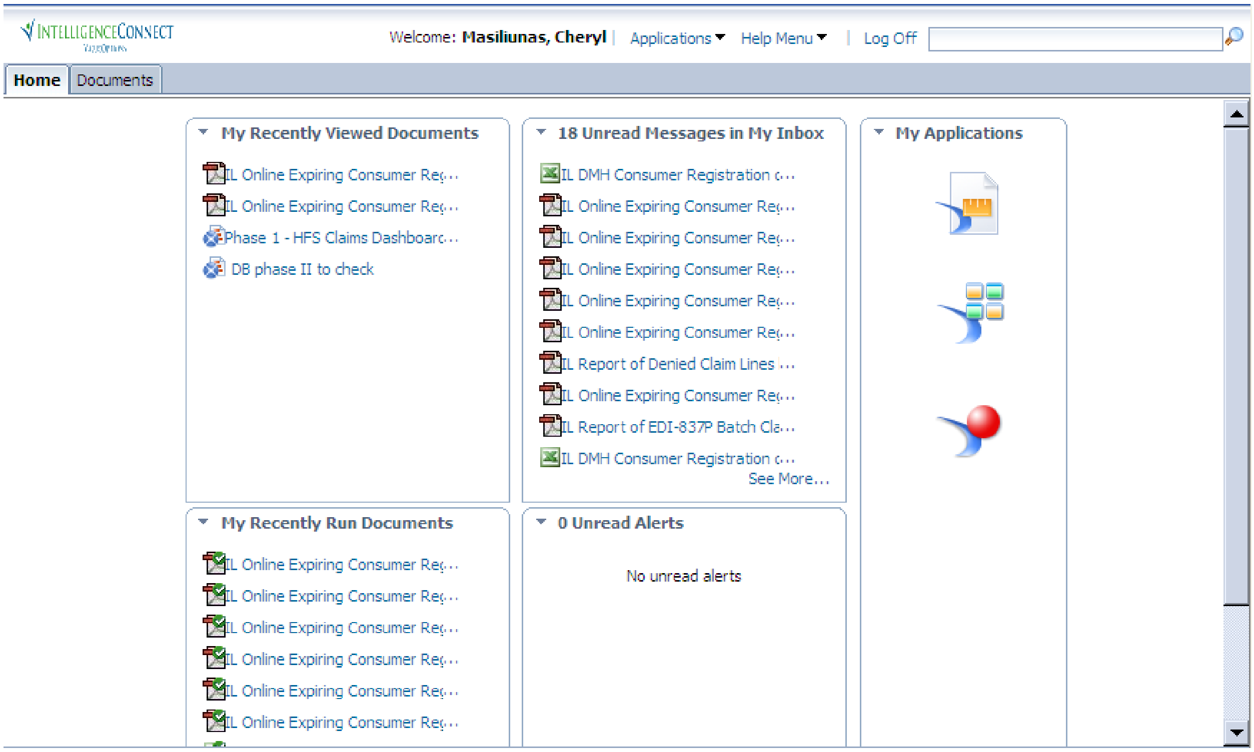
Accessing IntelligenceConnect

1. Access http://www.illinoismentalhealthcollaborative.com and click on the For Providers link. This will display the Provider Online Services Home Page.
2. Click on Log In, which displays the ProviderConnect Log In page. Enter your User ID (Submitter ID) and password and click on Log In button.
3. After logging in, select “I Agree” at the User Agreement screen and before proceeding you will need to acknowledge the Message from webpage box by clicking “OK” after reading.
4. The Welcome page now displays with the related menu options displayed on the left side of the screen.
5. To run a report, click on the “Reports” button on the left.

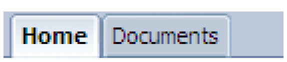


IntelligenceConnect Home Page

Once you click on “Reports” in ProviderConnect, the IntelligenceConnect home page displays.



The Home Tab allows for quick access to reports and information that you use on a regular basis. There are two main tabs located in the upper left-hand corner: Home and Documents.



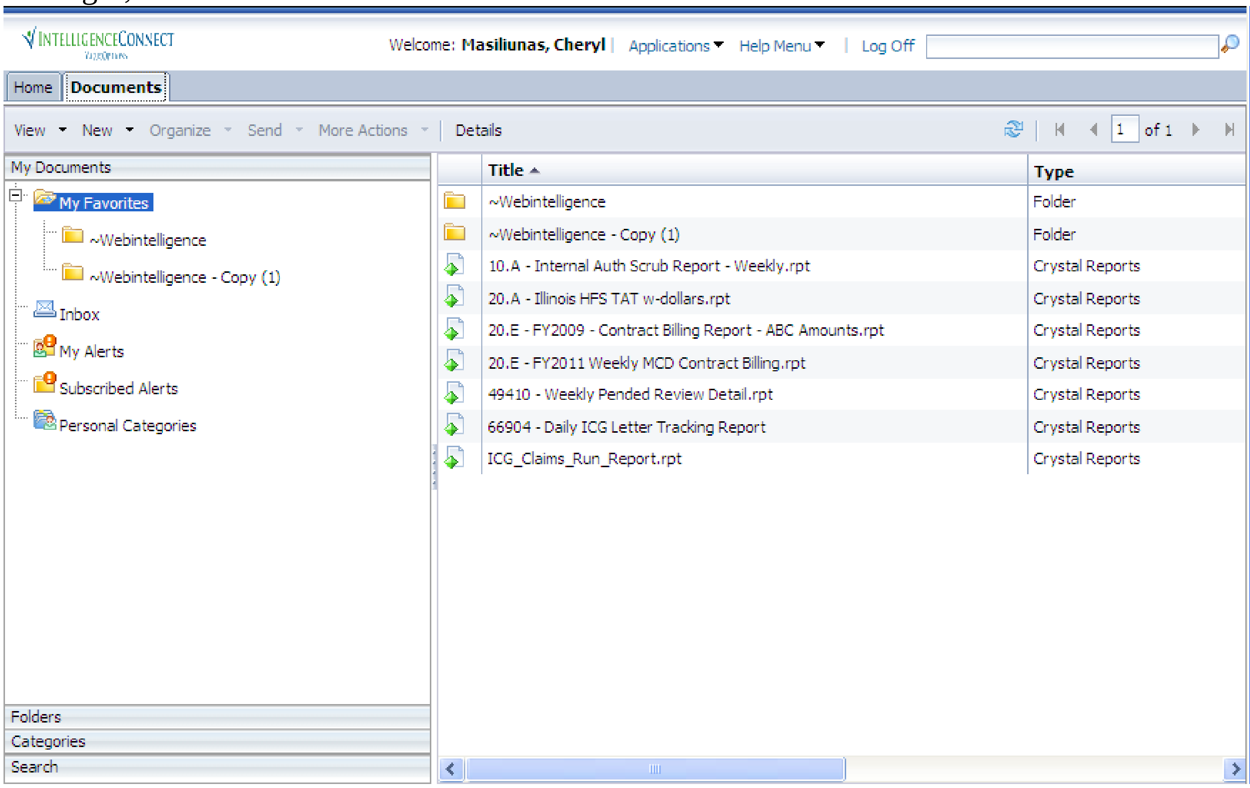
The Home tab displays the four main areas of interaction within IntelligenceConnect.

- The **My Recently Viewed Documents** portion displays the recent documents that you have used so that you will not have to search for items that you have recently accessed.
- Any messages programmed within reports when they run will be seen in **My Inbox**.
- The **My Recently Run Documents** section displays all the reports you have recently run.
- Any preprogrammed alerts within a scheduled report or from the business objects administrator display in the **Alerts** section.

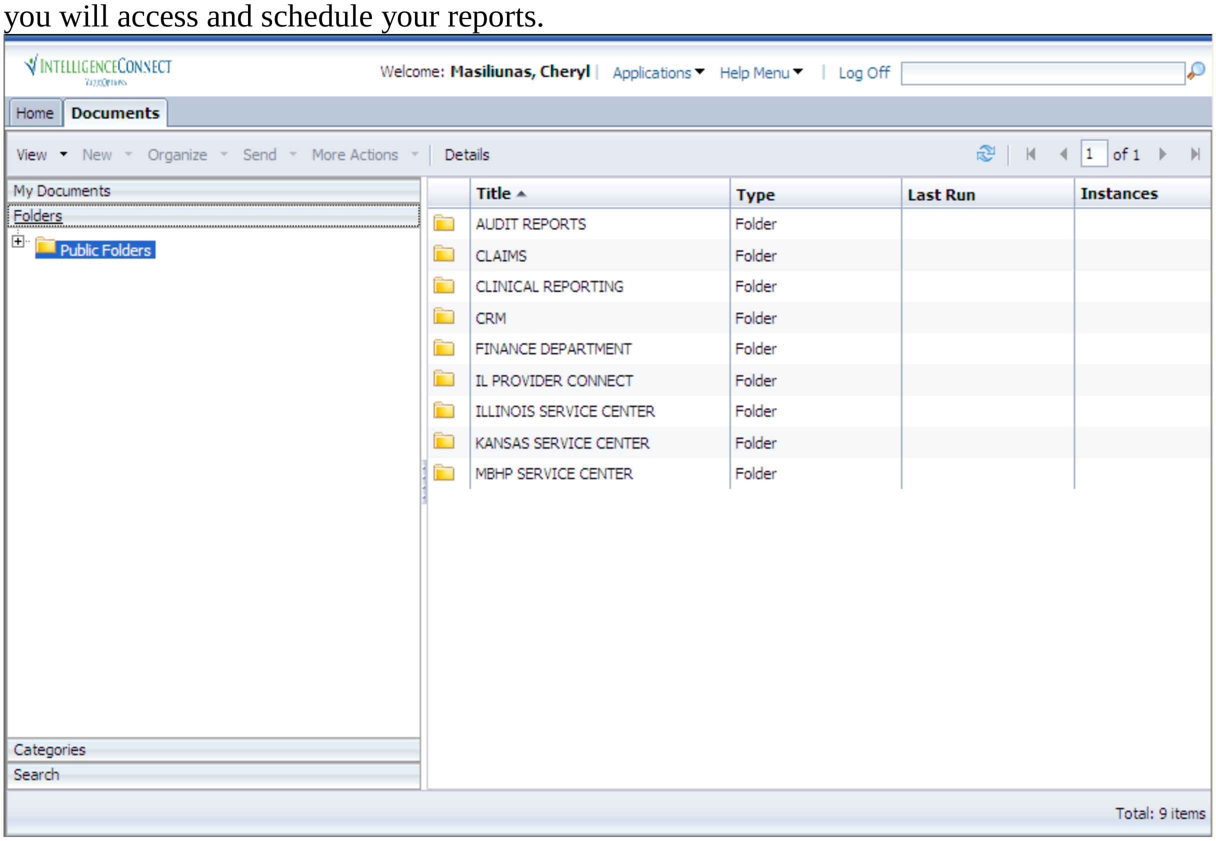
The Documents tab is where you navigate through the content that is included in IntelligenceConnect. This content is separated into four sections on the left-hand side. To access the content within each of these sections, click on the names:

- My Documents
- Folders
- Categories
- Search

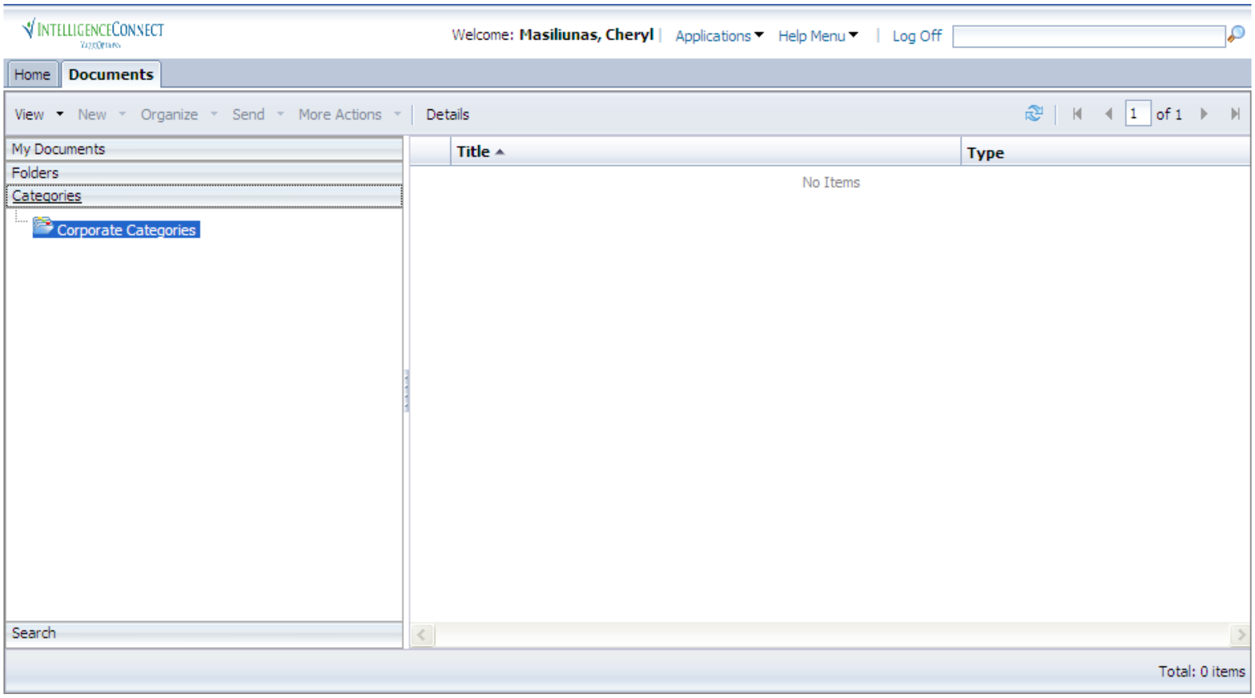
The default section is My Documents which contains all of your personal documents, reports, messages, and alerts.



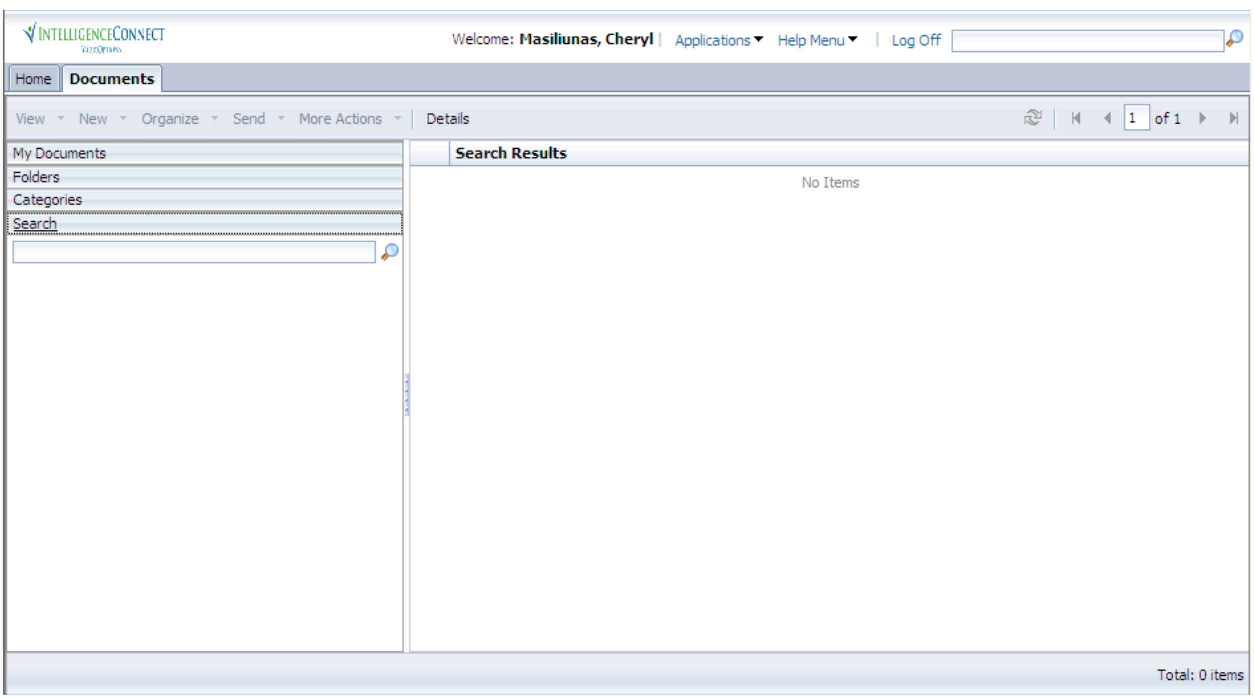
The Folders section contains all of the report folders to which you have access. This is where you will access and schedule your reports.



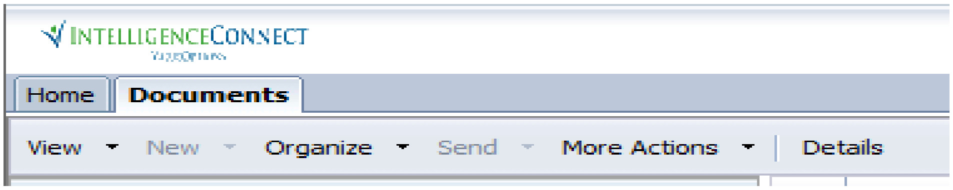
The Categories section displays any reports or documents that have been structured for a specific access to reports and documents in a certain area of business or category.



Utilize the Search section to find a report or document in the available folders. The names of reports as well as the report descriptions are searchable.



When you select a report or document in any of the sections, the action bar appears at the top of the screen.



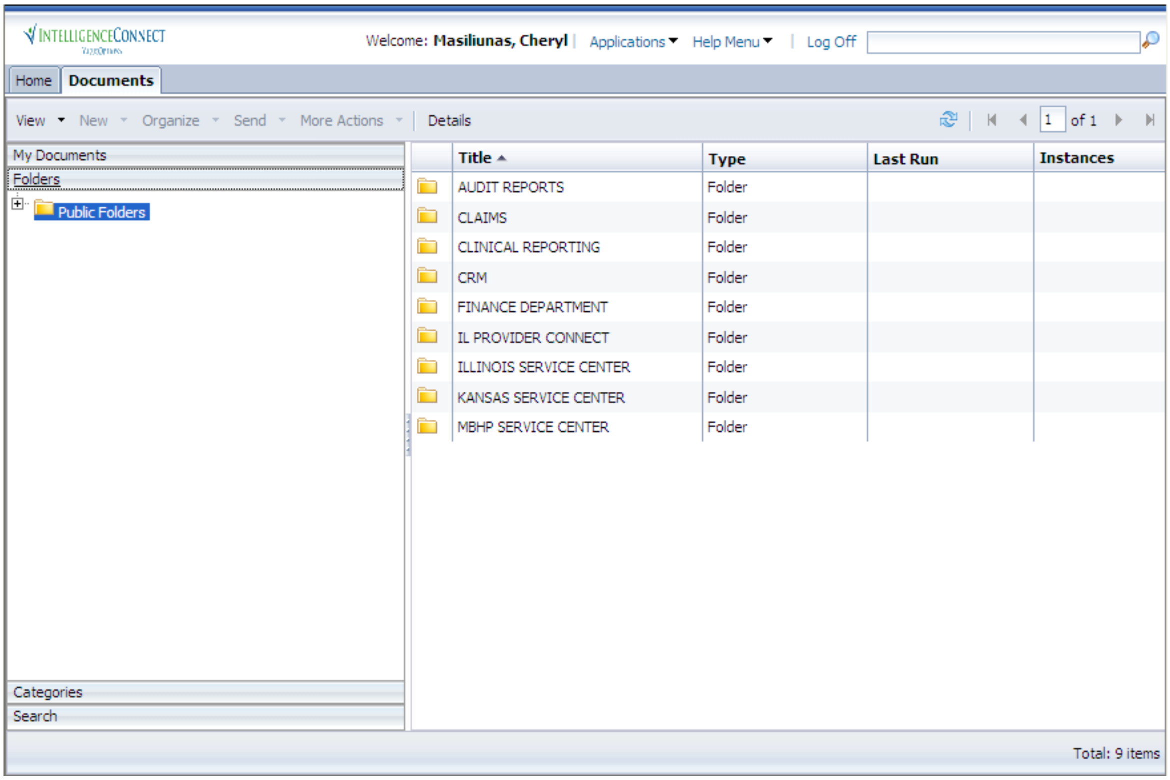
The Action bar allows you to:

- View your latest instance or the properties used to run the report
- Create a Shortcut in My Favorites using the Organize option
- Schedule a report using the More Actions option

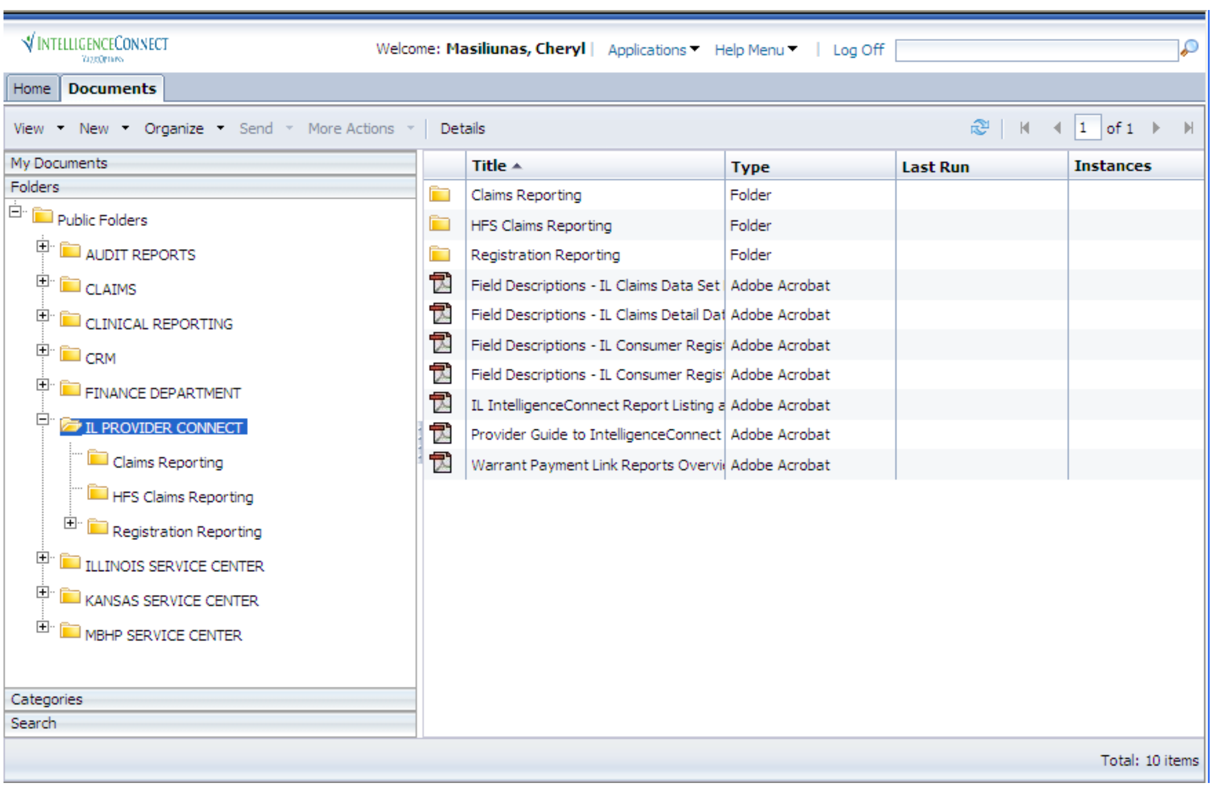
These actions are also available when you right-click on an object within IntelligenceConnect.

Scheduling Reports

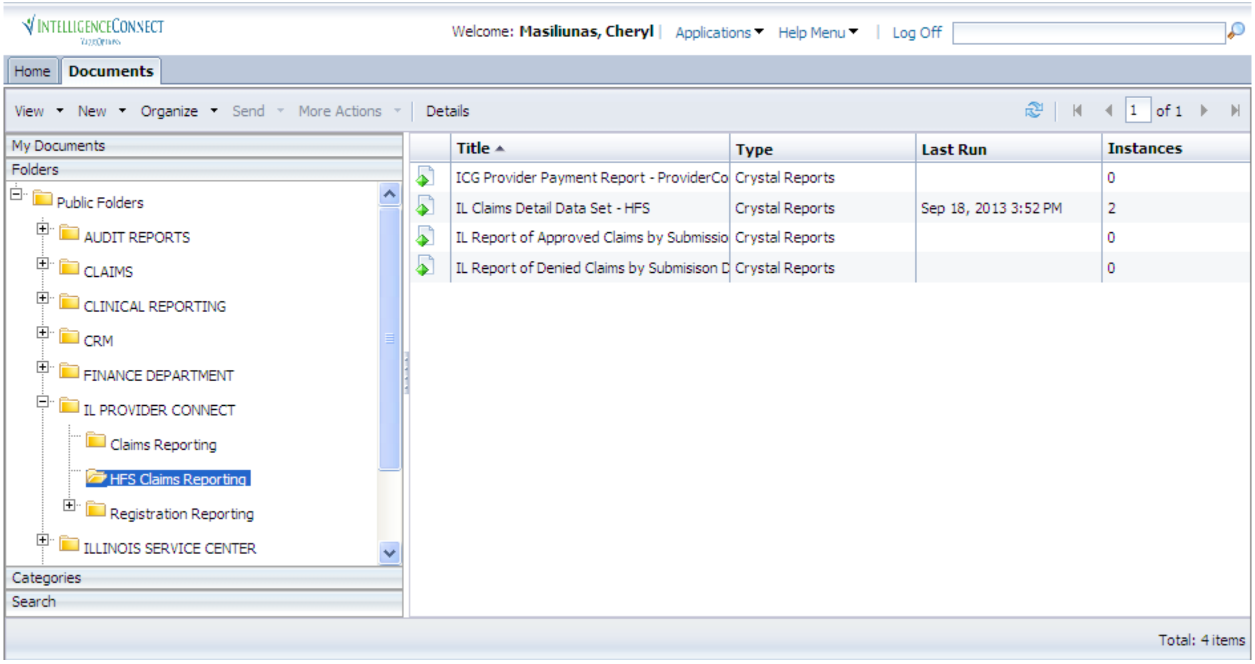
Navigate to the Documents tab and expand the Folders section.



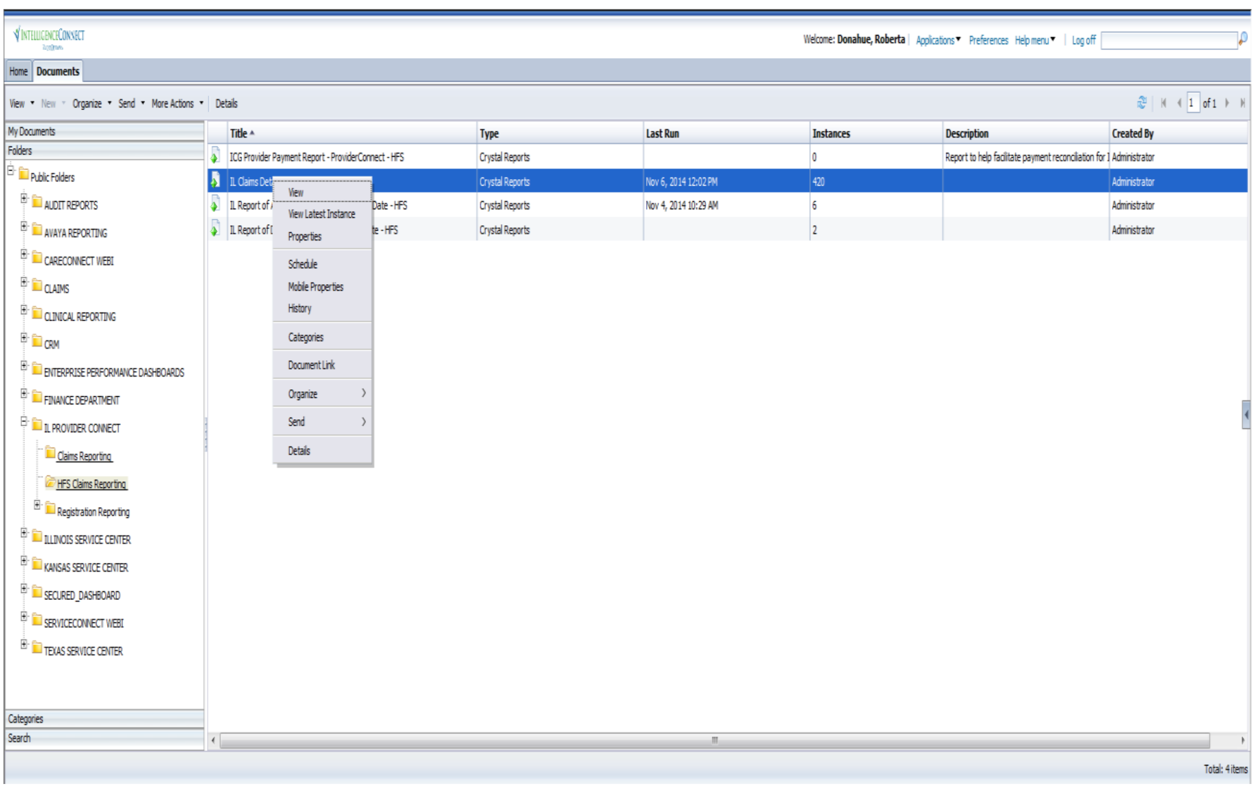
Expand the folders and select IL PROVIDER CONNECT.



Click on one of the Reporting folders to display the reports that are available.



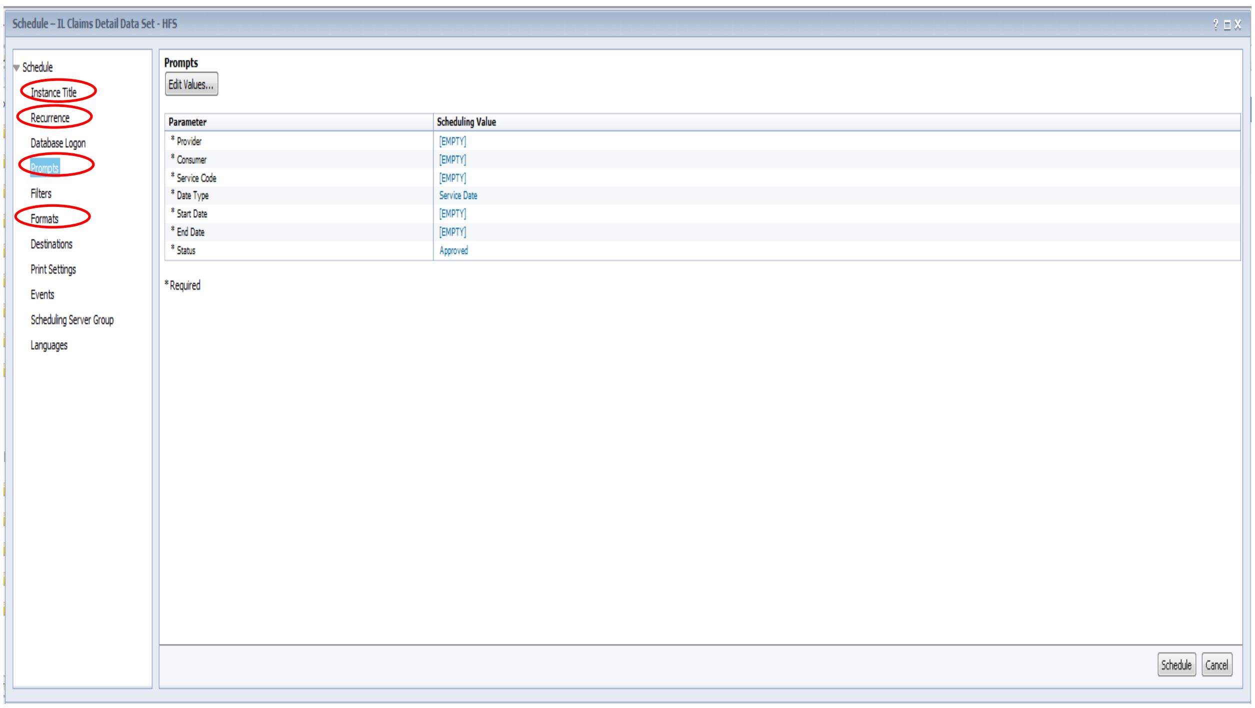
Right-click on the report that you want to run; select the Schedule option from the menu.



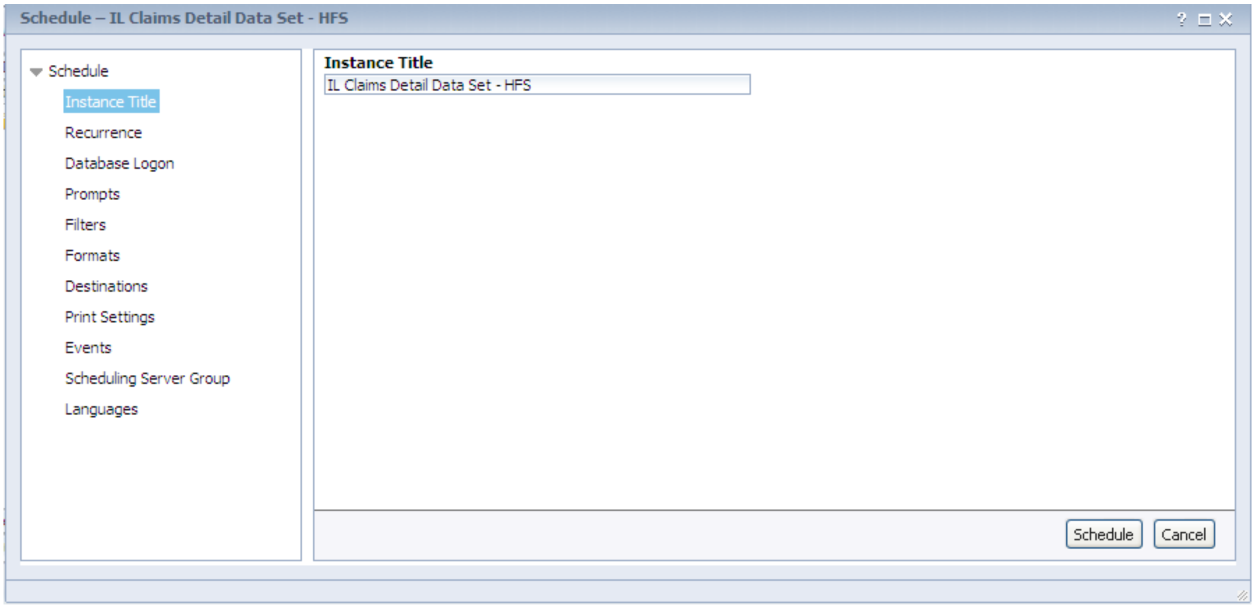
The Schedule box displays with 7 menu options:

- Instance Title
- Recurrence
- Database Logon
- Prompts
- Filters
- Formats
- Destinations
- Print Settings
- Events
- Scheduling Server Group
- Languages

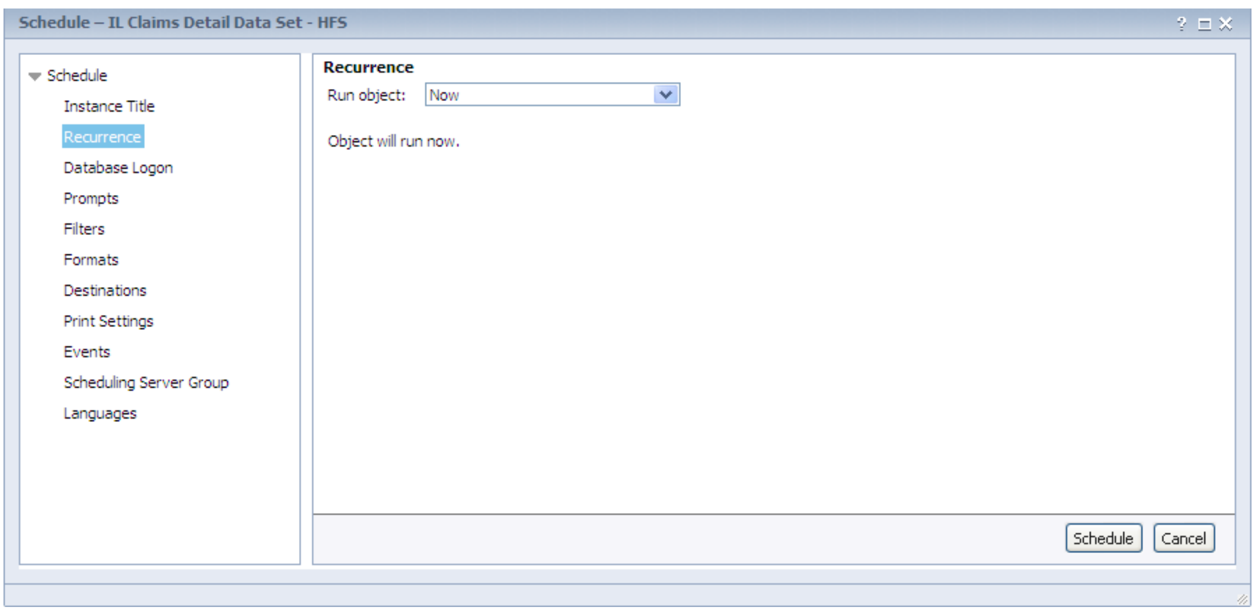
The only menu options that you will need to access when scheduling your reports are: Instance Title, Recurrence, Prompts, and Formats.



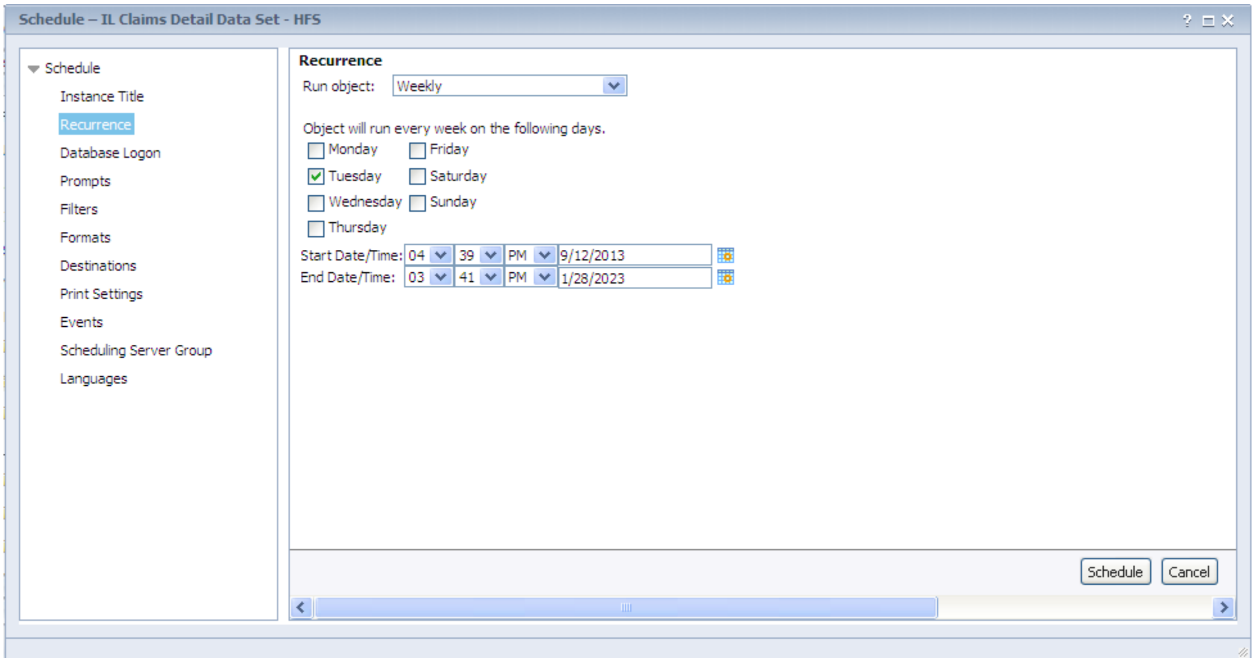
Instance Title is the name of the report instance that you are scheduling. You can leave it as the default name of the report itself, or change it to something different.



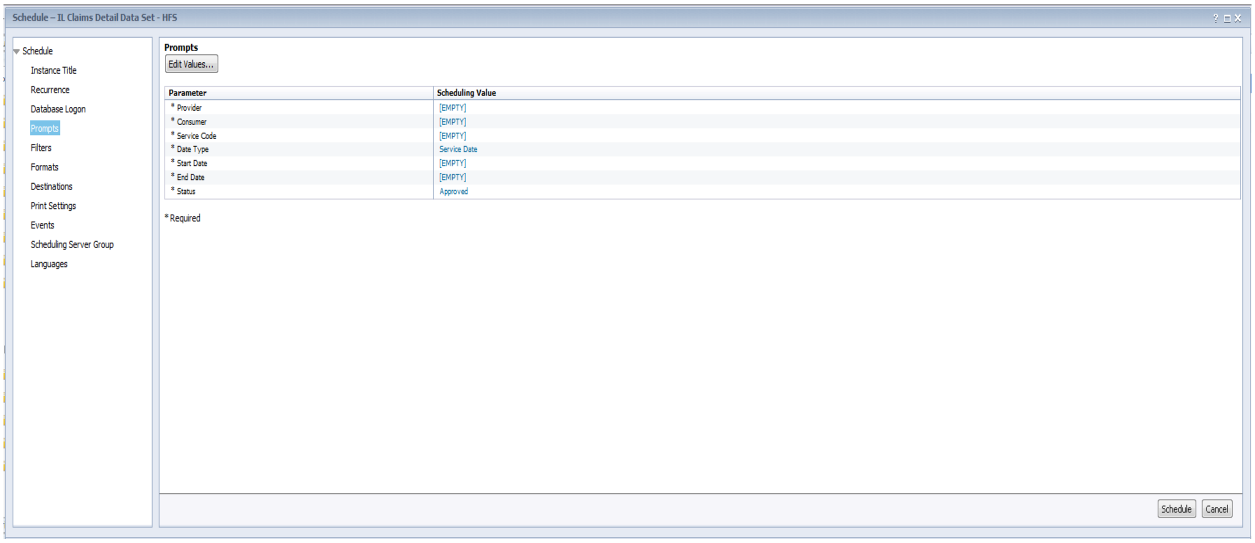
Recurrence is where you will indicate when you want your report to run. The default value is "Now" and will run your report one-time, immediately.



You can select the arrow in the Run Object field to select a recurring time frame to run your report. It is recommended that you schedule reports to run on a weekly basis, as the data within these reports is refreshed each week (refreshed data is available each Monday morning).

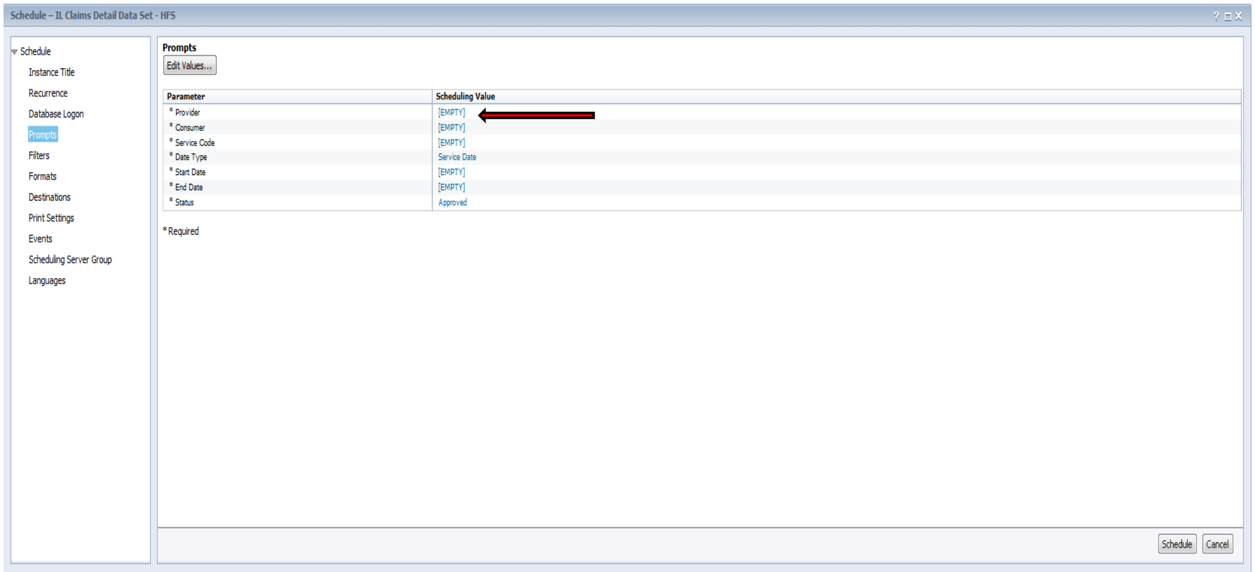


The Prompts menu is where you enter the information for the data you would like returned on your report.

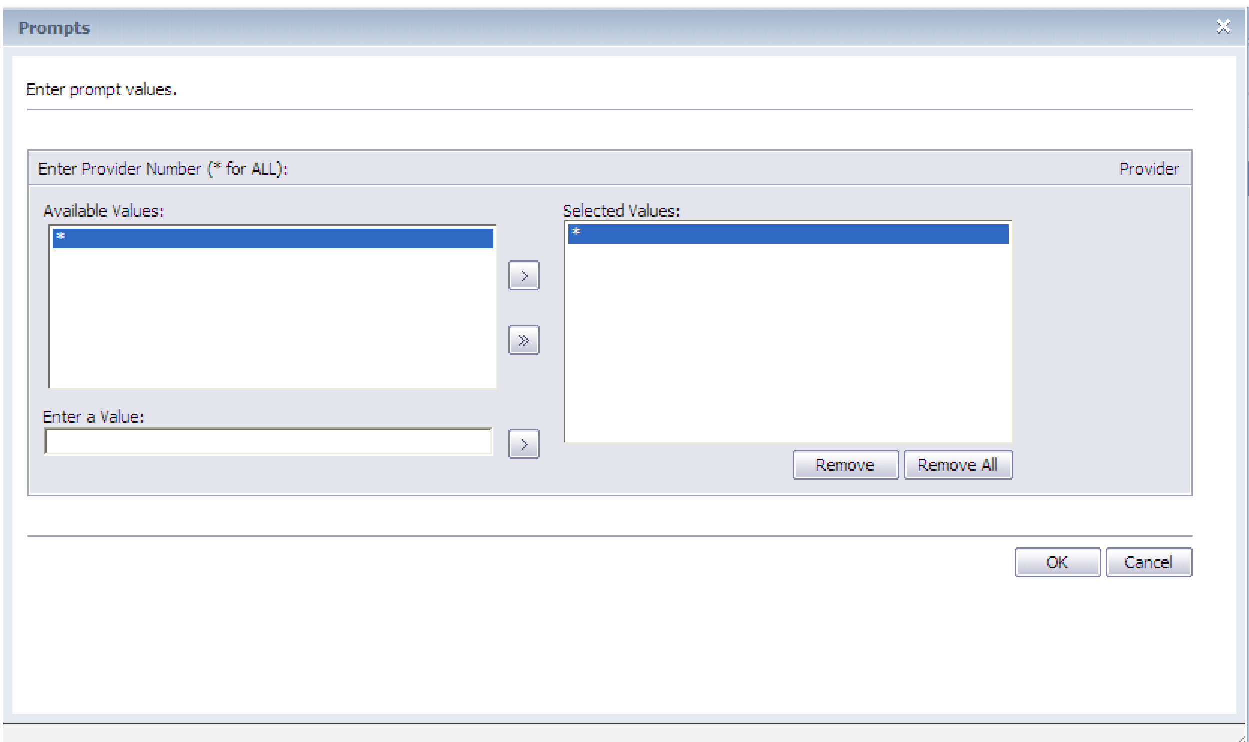


You will need to be sure that each parameter is completed within the Prompts section. This means that the "Scheduling Value" for each of the Parameters should have a value that is not [EMPTY].

To enter a Scheduling Value, click on the [EMPTY] link next to the Parameter.



Enter the information that is needed, and select OK.



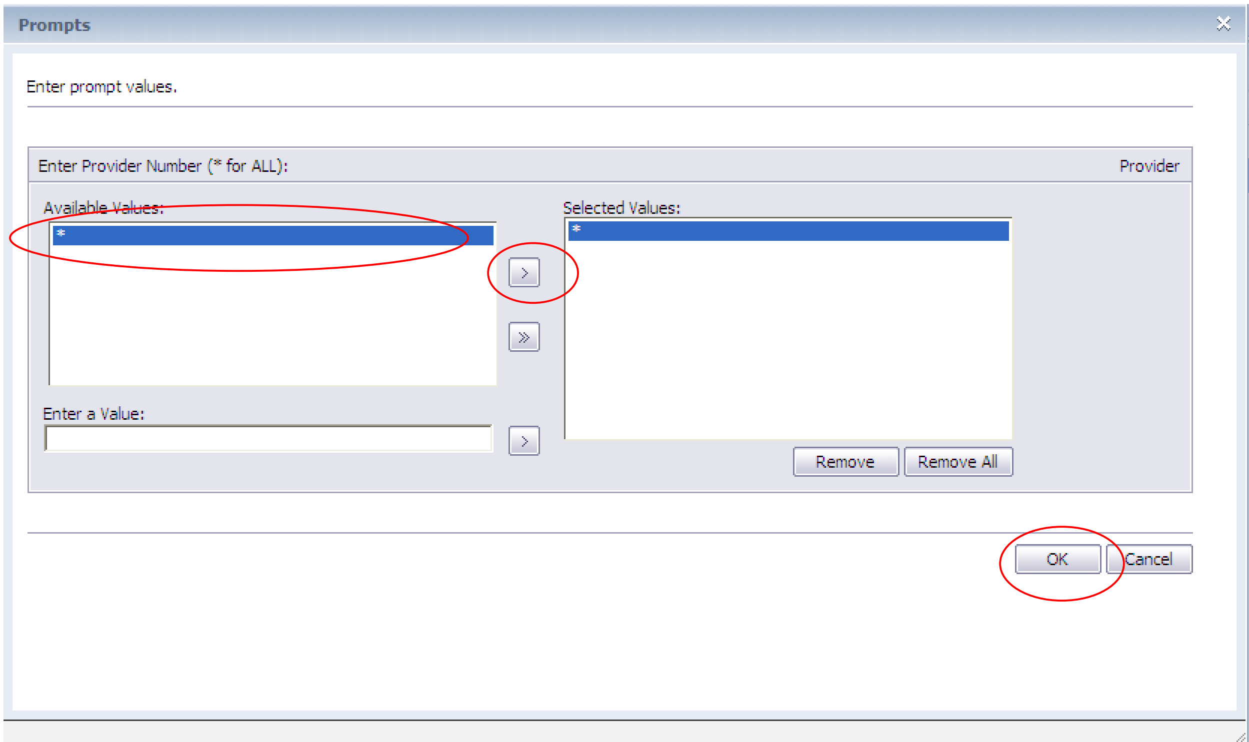
Complete this step for each parameter. Do NOT select Schedule until all of your parameters have been entered and there are no longer any [EMPTY] values.

Prompt/Parameter Types

There are a number of Prompt types that you may need to complete when scheduling a report.

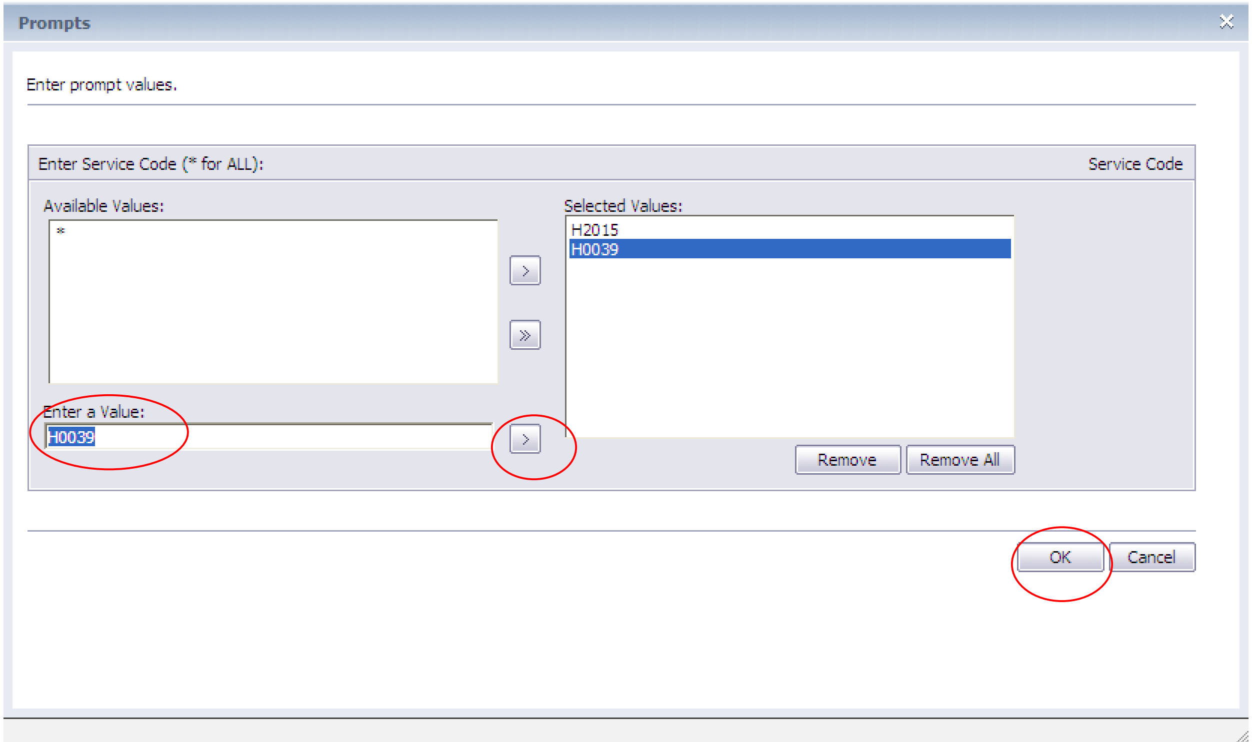
Available Values – For this Prompt type you can:

- Select the asterisk in the Available Values box to bring back all of the data for that field.
- Click on the single arrow in between the Available Values and Selected Values boxes to move the asterisk to the Selected Values box.
- Click on OK when you are done.



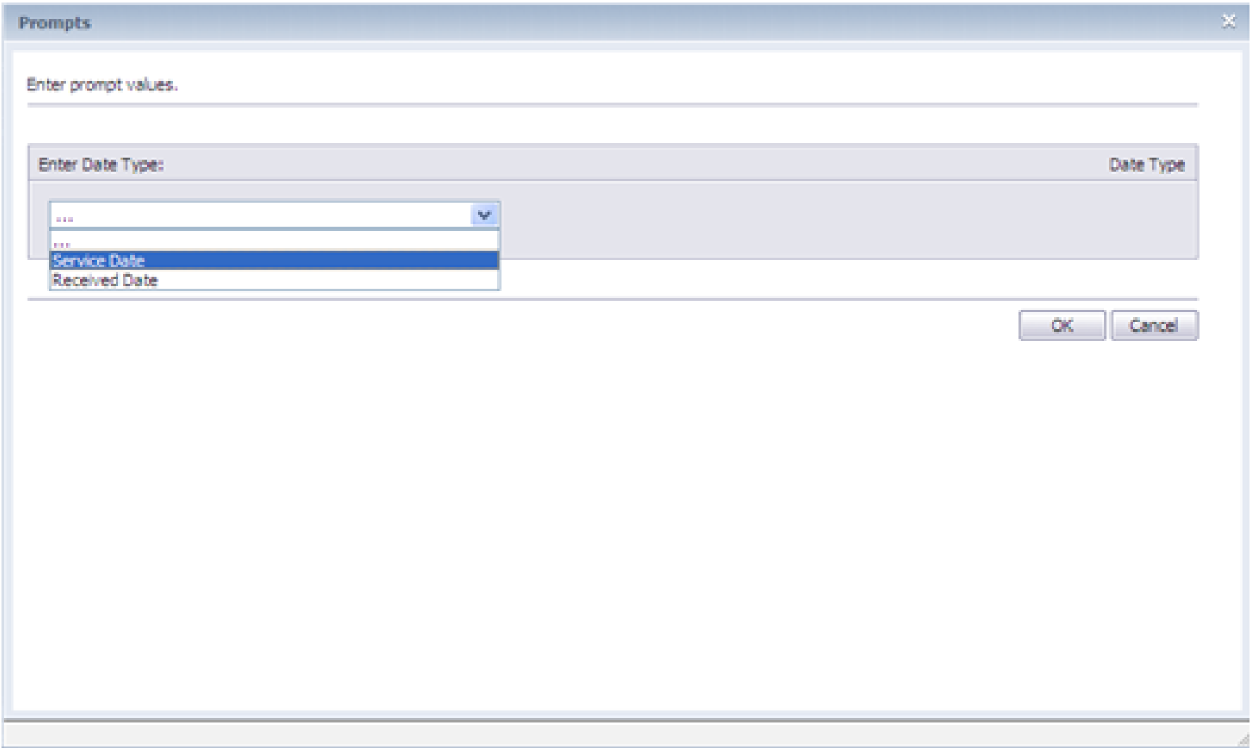
You can also enter values on this type of Prompt. For example, you can enter each Service Code that you want to display on the report.

- Enter a single service code in the Enter a Value box.
- Click on the arrow next to that box so that the Service Code displays in the Selected Values box.
- Repeat this process for each Service Code that you want returned on the report.
- *Note: Do not enter the service codes at the same time; enter each one separately, as detailed above.*



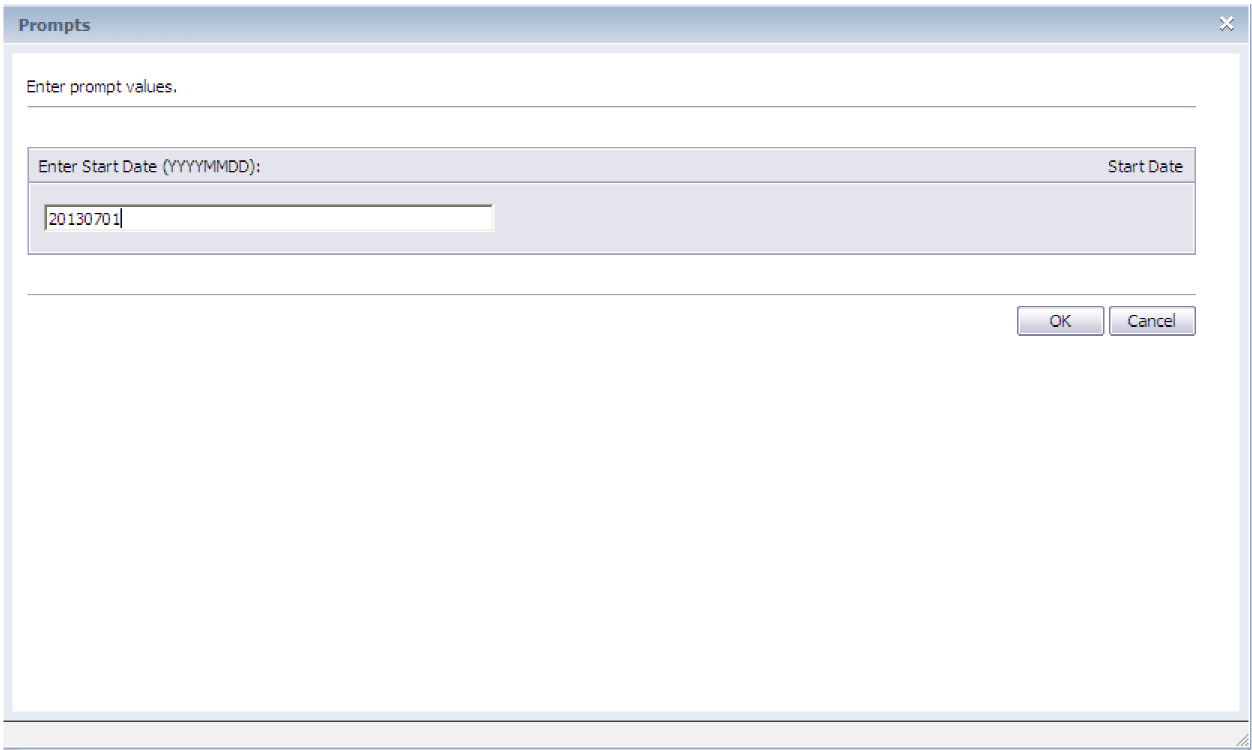
Pick List Prompt – This type of Prompt has a field available with an arrow to show the available values.

- Click on the arrow to show the values.
- Select a value.
- Click on OK.

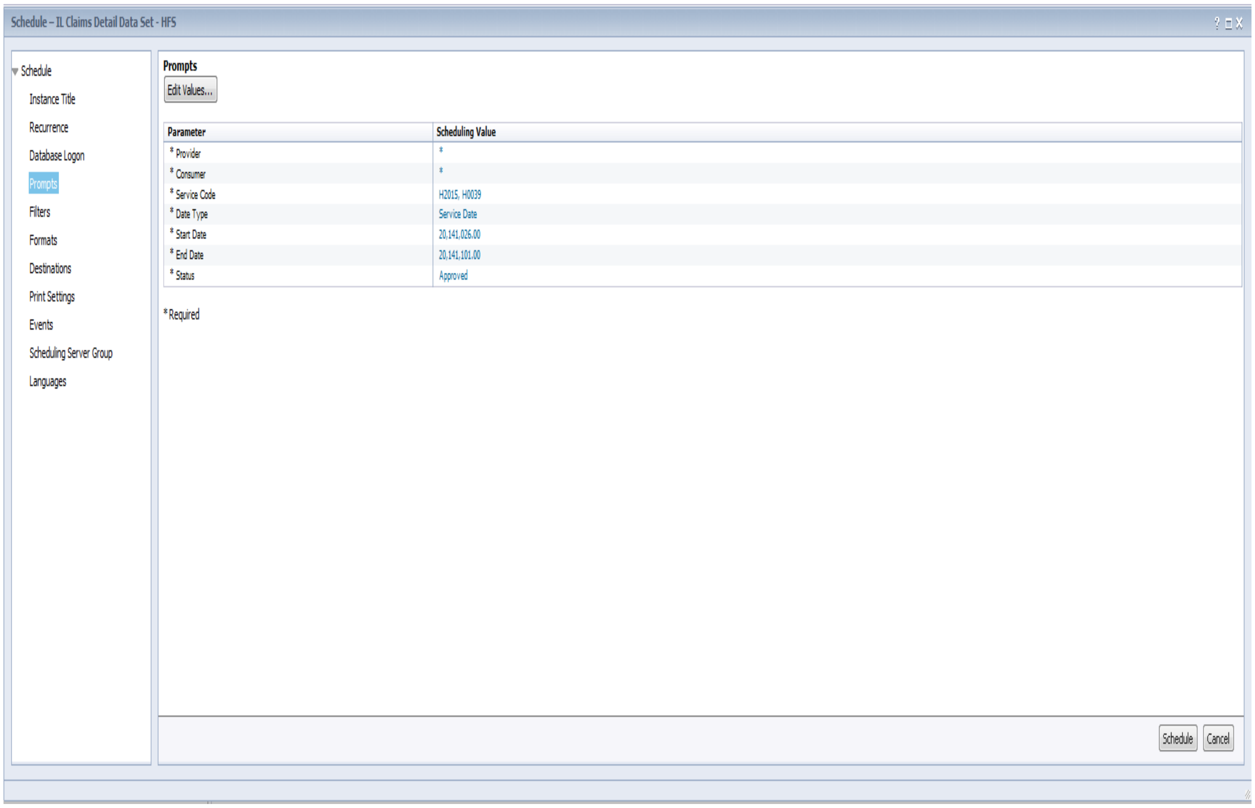


Date Value Prompt – When entering values in this type of Prompt you will need to pay attention to the date format that is needed.

- In the example below, the date needs to be entered in the following format: YYYYMMDD.
- This means that if you are entering the date of July 1, 2013 you will enter it as: 20130701

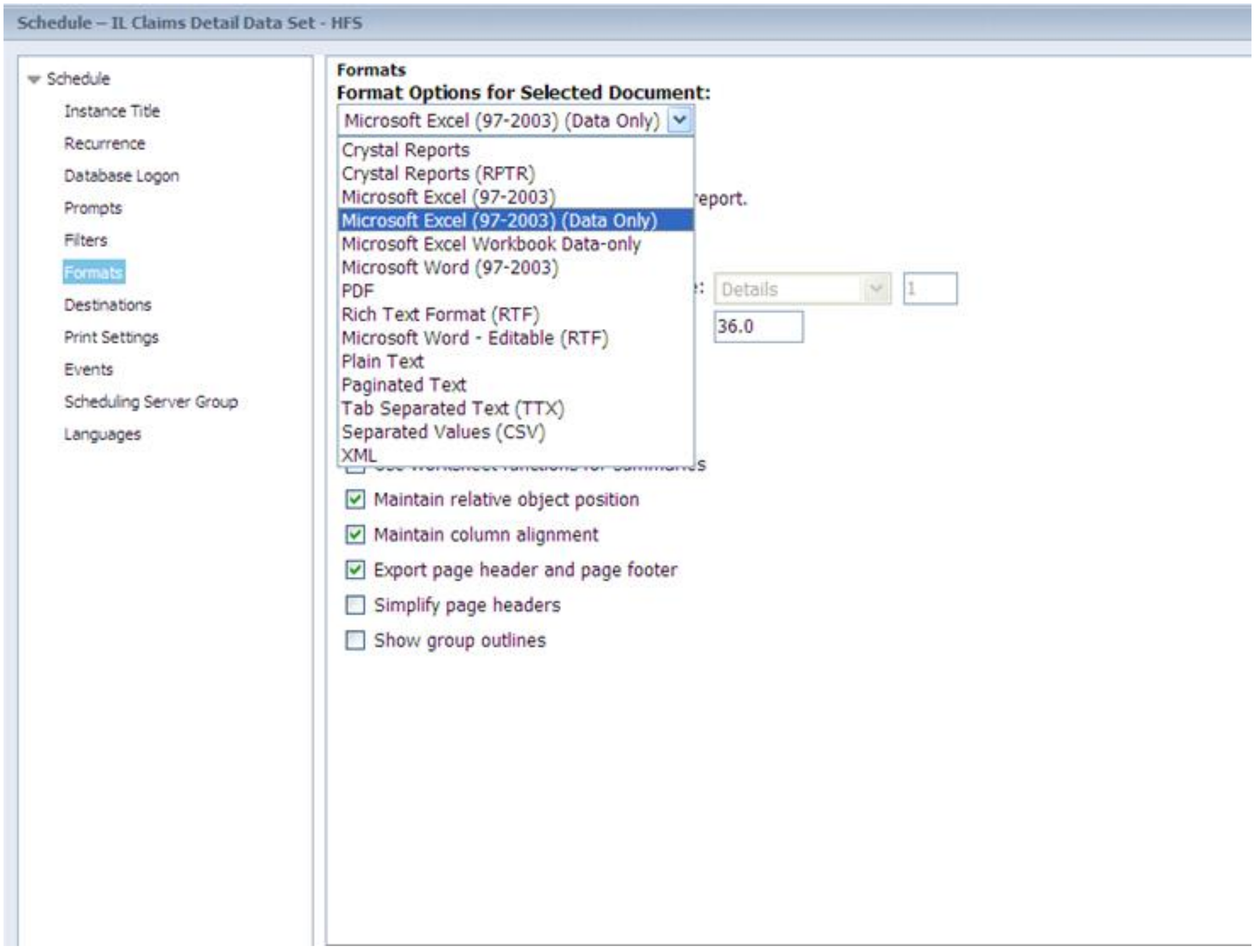


Once you have completed all of the Prompts, your screen should no longer have any [EMPTY] Scheduling Values.



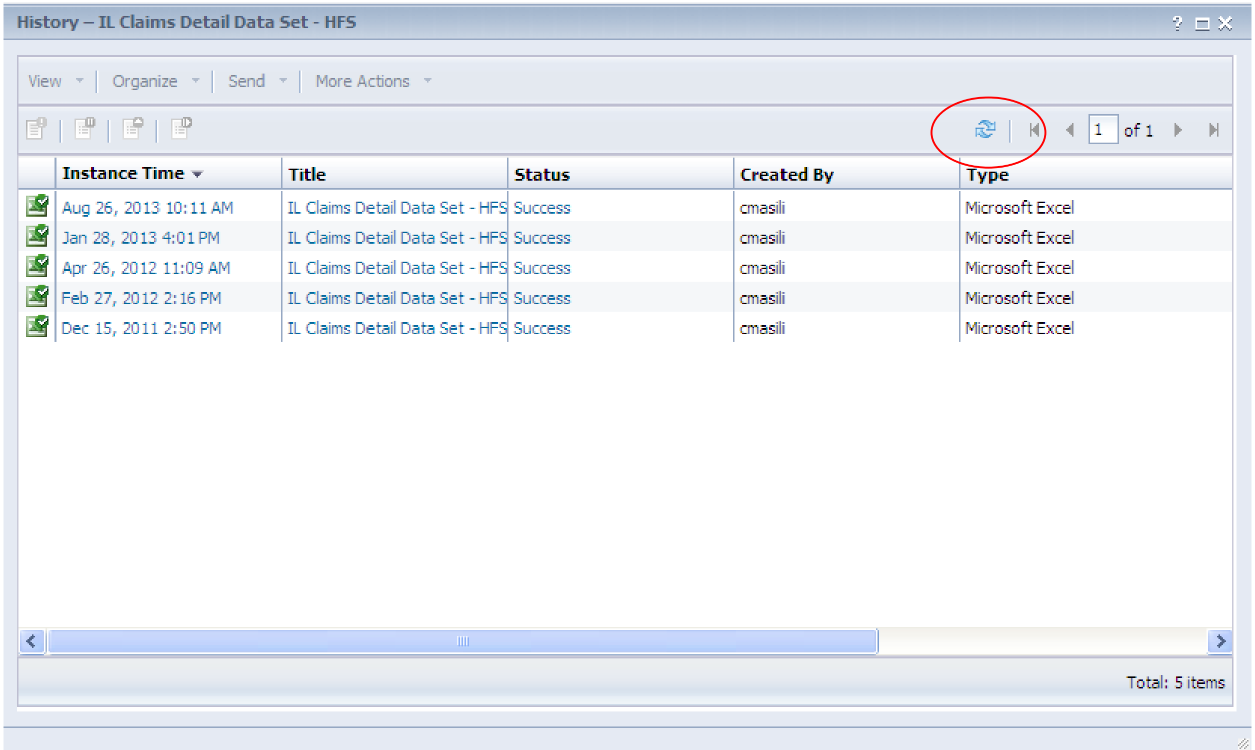
You can now Format your report if needed. All reports have a default output format of either Excel or PDF, depending on the type of data that is being displayed. Therefore, you can Schedule your report without accessing the Format menu at this time. However, if you need to change the format of the report:

- Click on the Format option.
- Select the format for which you would like to see the output of your report.
- Complete the necessary fields.



Once you are done entering all of your settings for the report schedule click on Schedule in the bottom right-hand corner.

Your report will appear in the instance History screen with a status of Pending, Running, or Recurring. To view the updated Status of the report, click on the blue arrows to refresh the screen.



Once your report Status updates to Success you can open the report. Click on the Instance Time to view/open your report. This will bring up the actual report. It may now be printed or saved to your local PC or shared drive. To print your report click on the ‘Print’ icon, to save your report click on the ‘Save’ icon and save it on your local drive.

Reports are available on IntelligenceConnect for 7 days.

If you have any questions, or need technical guidance, contact the e-Support Helpdesk at (888) 247-9311, Monday through Friday, 8am – 6pm EST. You may also email the Helpdesk directly at e-supportservices@valueoptions.com