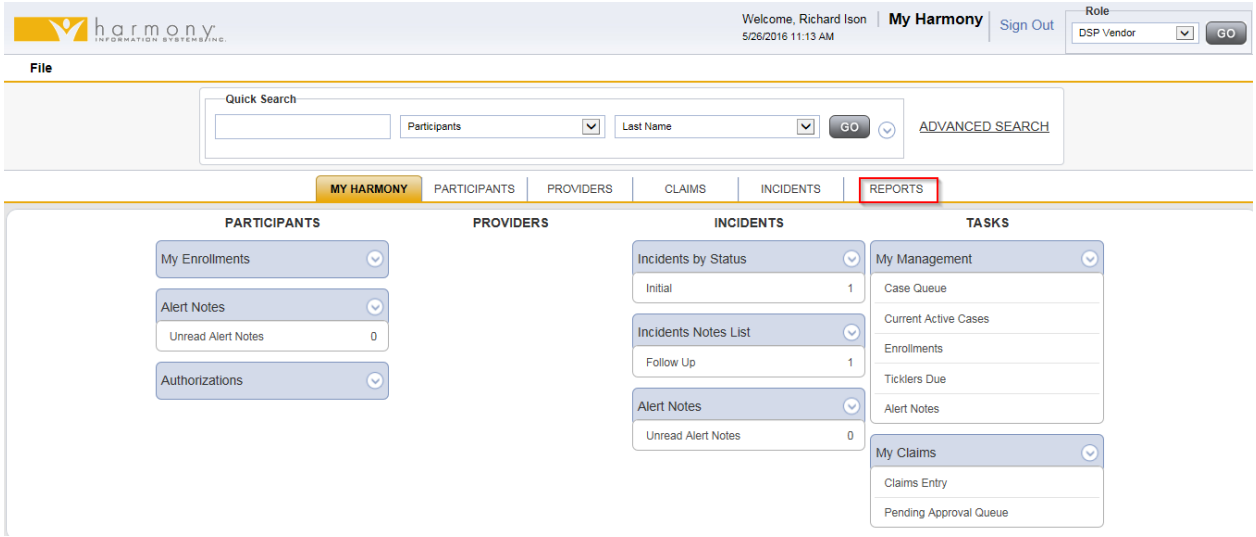
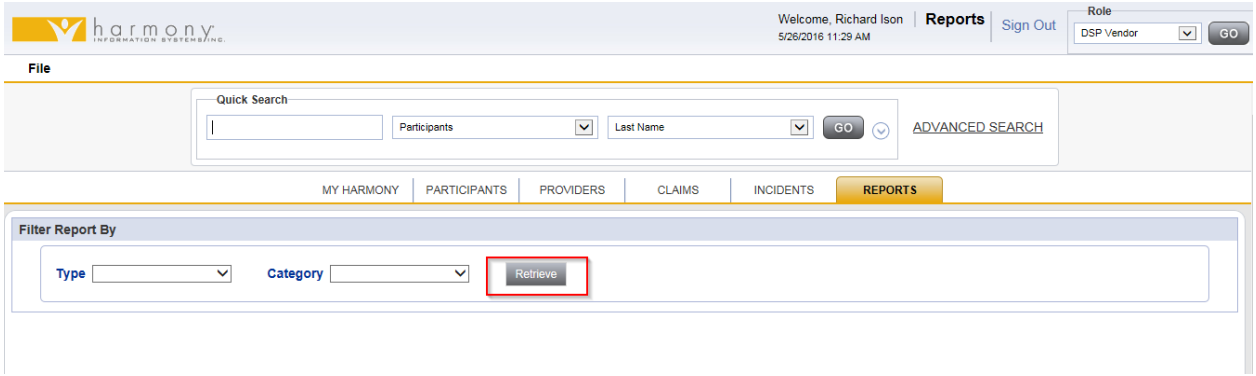
Reports Chapter in Harmony

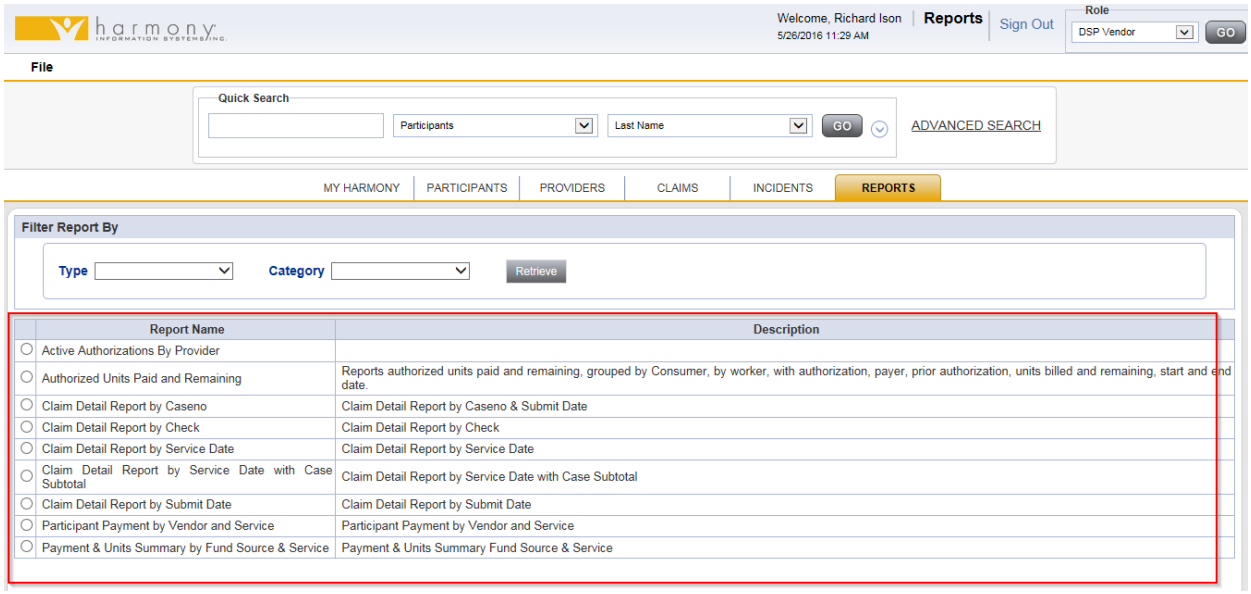
The Reports Chapter in Harmony is available to DSP vendors to generate a variety of reports. The following guide includes instructions on how to generate reports, directions on printing and exporting reports, and explanations of the purpose and parameters for each report. For any additional questions related to Harmony, please e-mail harmony@aaa1b.com



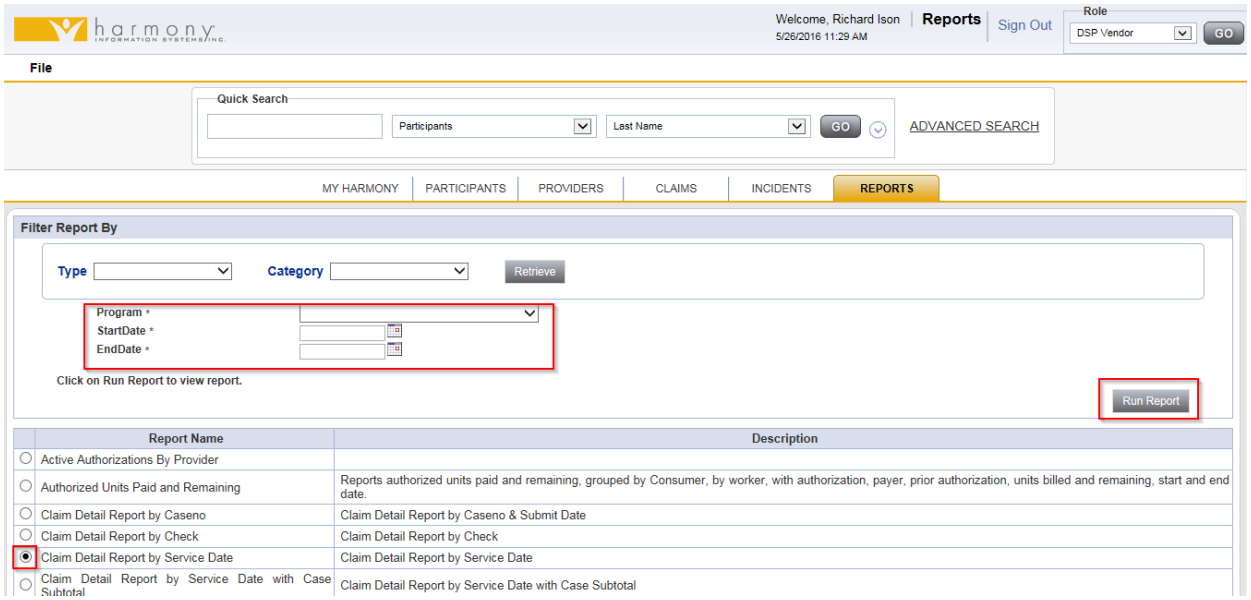
1. Click on the **Reports** chapter.



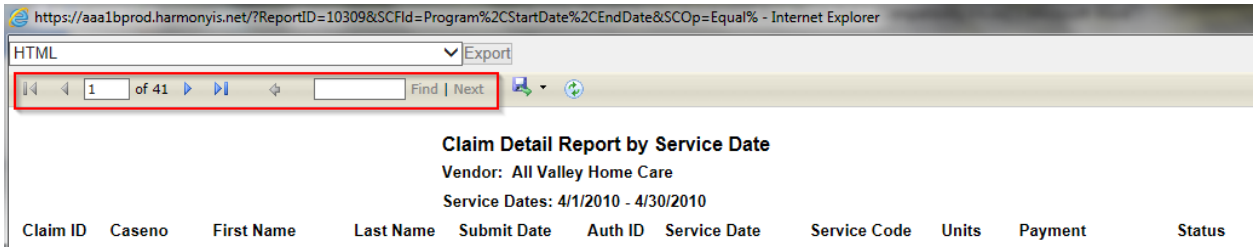
2. Leave the **Type** and **Category** boxes blank. Click **Retrieve**.



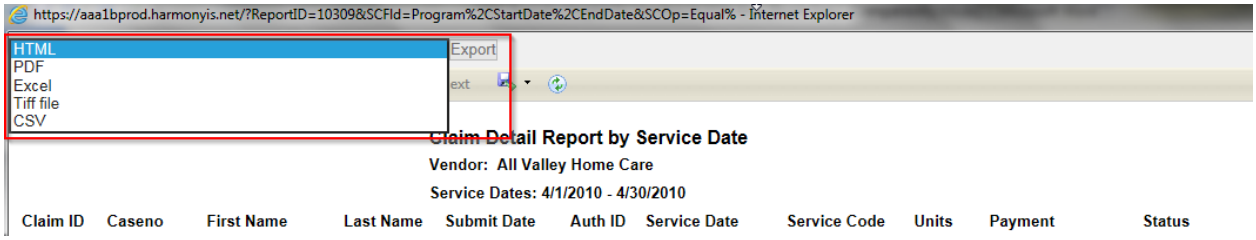
3. You will be presented with a list of reports currently available to DSP Vendors.



4. To run a report, click the radio button in front of the report you want to use.
5. When you select the radio button, parameters will appear above the reports list.
6. Fill in the parameters appropriately. See Table 1 below for more information on how to complete parameters.
7. When ready, click **Run Report**.



8. A new window will open with the report in it.
9. At the top of the screen, there are some options for viewing.
    a. Use the arrows to scroll through the pages of the report.
    b. Use the 100% drop down box to zoom in or zoom out the view of the report.
    c. Use the blank box with Find and Next to search for particular words in the report. This is helpful when looking for claims for a specific participant.



10. In the **Select a format** drop down, you can select the format you would like to export the report to. Excel is helpful if you would like to do further sorting and filtering of claims to isolate an error. Acrobat (PDF) file is useful if you would like to keep electronic copies of the report as proof of the billing work done in Harmony. Once a format is selected, click **Export**. You may then print the report.
11. The white box with two circling green arrows is the **Refresh** button. You can click this button for the report to run again, including any additional data that may be present since you first ran the report.

Table 1 – Report Detail

Report Name	Description	Parameters
Active Authorizations by Provider	Lists all active authorizations for a particular fiscal year and vendor. Useful when doing billing, as Auth ID is found on the report.	**Fund Code** – Select AAA **Fiscal Year** – Select appropriate fiscal year, which runs 10/1 – 9/30. **Program** – Select vendor name
Authorized Units Paid & Remaining	Lists all authorizations for a particular fiscal year and vendor. Similar to Active Authorizations by Provider report, but also includes how many units of service have been paid and how many units are remaining on the authorization.	**Fund Code** – Select AAA **Fiscal Year** – Select appropriate fiscal year, which runs 10/1 – 9/30. **Program** – Select vendor name

Claim Detail Report by Caseno	Details the claims for one participant by selected vendor within a date range of when the claims were submitted. Includes Grand Totals. Exports to Excel easily. Delete first 4 rows to sort and filter spreadsheet.	**Program** – Select vendor name **Start Date** – Enter first possible date to include in report. NOTE: This report is filtering by the date the claims were submitted, not the date of service. **End Date** – Enter last possible date to include in report. **Caseno** – Enter unique identifier for participant; can be found in Participant record.
Claim Detail Report by Check	Details all the claims contained on a particular check. Includes Grand Totals. Exports to Excel easily. Delete first 4 rows to sort and filter spreadsheet.	**Program** – Select vendor name **Start Date** – Enter the date before the date of the check. This is the EOP Date, when the claims were exported from Harmony into the AAA 1-B general ledger. **End Date** – Enter the same date as Start Date.
Claim Detail Report by Service Date	Details all the claims entered into Harmony based on date of service. For example, you can use to verify all of the previous month's billing. Includes Grand Totals. Exports to Excel easily. Delete first 4 rows to sort and filter spreadsheet.	**Program** – Select vendor name **Start Date** – Enter first possible date to include in report. NOTE: This report is filtering by the service delivery date, not the submit date. **End Date** – Enter last possible date to include in report.

Report Name	Description	Parameters
Claim Detail Report by Service Date with Case Subtotal	Details all claims entered into Harmony based on date of service. Includes a subtotal by participant and Grand Totals. Exports to Excel easily. Delete first 4 rows to sort and filter spreadsheet.	**Program** – Select vendor name **Start Date** – Enter first possible date to include in report. NOTE: This report is filtering by the service delivery date, not the submit date. **End Date** – Enter last possible date to include in report.
Claim Detail Report by Submit Date	Details all claims entered into Harmony based on the date the claim was submitted. Includes Grand Totals. Exports to Excel easily. Delete first 4 rows to sort and filter spreadsheet.	**Program** – Select vendor name **Start Date** – Enter first possible date to include in report. NOTE: This report is filtering by the date the claims were submitted, not the date of service. **End Date** – Enter last possible date to include in report.
Participant Payment by Vendor & Service	Similar format to report that was previously sent with checks before Harmony. Shows total paid by a particular check, with subtotals by service and participant.	**Program** – Select vendor name **Start Date** – Enter the date before the date of the check. This is the EOP Date, when the claims were exported from Harmony into the AAA 1-B general ledger. **End Date** – Enter the same date as Start Date.
Payment & Units Summary by Fund Source & Service	Similar format to report that was previously sent with checks before Harmony. Shows total paid by a particular check, with subtotals by fund source and service.	**Program** – Select vendor name **Start Date** – Enter the date before the date of the check. This is the EOP Date, when the claims were exported from Harmony into the AAA 1-B general ledger. **End Date** – Enter the same date as Start Date.