

Reports Quick Reference Guide

The Supervisor role is the only role in PIA with the *Reports* tab. The following are descriptions of six reports available in PIA. These reports can be run often, within any timeframe, to monitor the work by your AAA. When in a summary report, clicking on the hyperlink allows the information to show more detail.

Desk Review Report- The summary report shows the total number of Desk Reviews In Progress, Withdrawn, Completed within 10 Business Days, and Completed Late. Use the Desk Review Summary Report when pulling numbers for monthly invoices. For invoices, you will need to add the completed in 10 Business Days column and the Late column for the total. When the report is expanded to show the details or running the detail report from the menu, the PIA IDs pertaining to each category will be available.

FED and PASRR Completion Report- This report, in summary, shows a breakdown of both FED and PASRR Total Requested Assessments, Total Completed, Total Allow Excuses, Total Completed within 10 Business Days, and what PIA shows as the percentage completed within 10 business days. *This calculation should be done manually. Directions are at the end of this document.* When this report is expanded to *detail*, the report will break down the information to include the applicant's PIA ID with dates, status, and program type. The detailed report would be the most helpful for monitoring FEDs and PASRRs to make sure they have been submitted.

Applicant Applied/FED Completion Report- This report in summary mode shows the breakdown of the number of FEDs by referral sources; IEB or AAA/Aging Well (community), # of Completed Assessments, and the breakdown of FED determinations (NFCE/NFI) by percentage results. This report can be expanded to show detailed information about each applicant for which a FED was completed. When submitting invoices, it is suggested to use this report to capture the number of FEDs completed. It is essential to check that there were no unnecessary duplicate FEDs completed before submitting the monthly invoice. Click on the hyperlink of completed assessments; when in summary mode, export to excel and filter by duplicate values or by running the Applicant Applied/FED Completion Report detail report from the menu and export to excel.

FED Excuse Report- This report, in summary, shows all of the FEDs indicated as late with their corresponding reasons why. This report can be expanded to display detailed information about each applicant for which a FED was late. **IMPORTANT:** While Assessor Unavailable Within Required Timeframe and Assessor Cancellation is an option, it is **not** an acceptable excuse for a FED being late. Any FED marked with Assessor Unavailable Within Required Timeframe, and Assessor Cancellation will **not** count as acceptable.

PASRR Excuse Report- This report, in summary, shows all of the PASRRs that were indicated as late with their corresponding reasons why. This report can be expanded to display detailed information about each applicant for which a PASRR was late.



IMPORTANT: While Assessor Unavailable Within Required Timeframe and Assessor Cancellation is an option, it is **not** an acceptable excuse for a FED being late. Any FED marked with Assessor Unavailable Within Required Timeframe, and Assessor Cancellation will **not** count as acceptable.

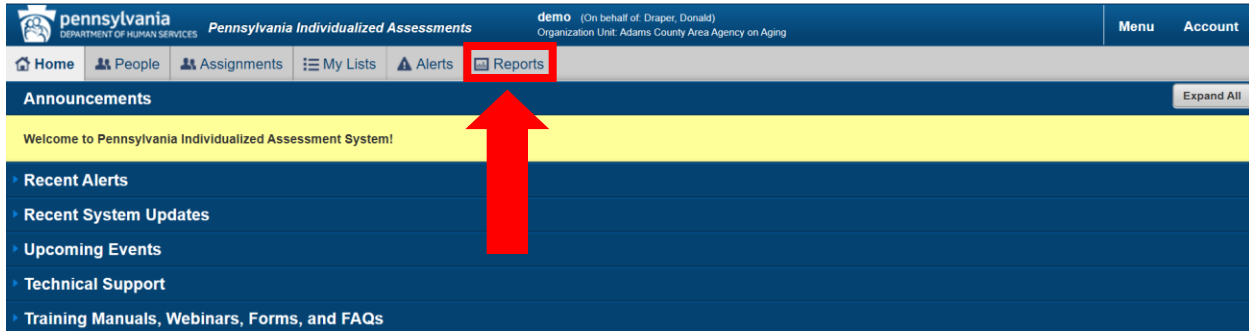
Annual Redeterminations and Desk Review Report- This report shows the Annual Redeterminations completed by the MCO's and Desk Reviews conducted by the AAA. The Total Requested Assessments, Total Completed, Total Allow Excuses, Total Completed in 10 Business Days, and the percentage of total Completed within 10 Business Days, are displayed for both. This report can be expanded to show detailed information about each applicant for an Annual Redetermination and Desk Review. This report would be the most helpful for monitoring Desk Review completion percentages.

The following reports currently have limitations and are not recommended:

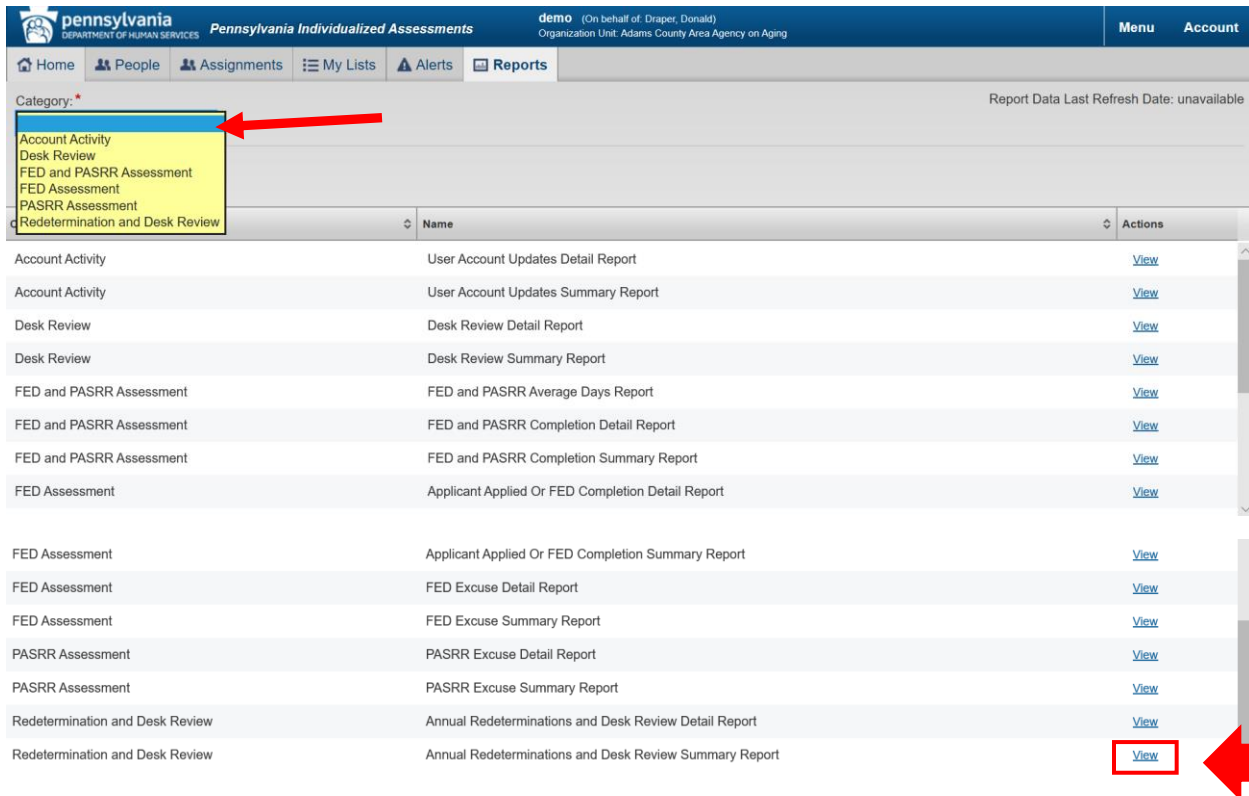
- FED and PASRR Average Days Report
- User Account Updates Report
- Redetermination Timeliness Report

How to Run Reports

Click on the *Reports* tab.



From here, you will see a list of available reports for your AAA. You may need to scroll down to see all of the reports available, or you can condense the reports shown by clicking on the category dropdown.



Category	Name	Actions
Account Activity	User Account Updates Detail Report	View
Account Activity	User Account Updates Summary Report	View
Desk Review	Desk Review Detail Report	View
Desk Review	Desk Review Summary Report	View
FED and PASRR Assessment	FED and PASRR Average Days Report	View
FED and PASRR Assessment	FED and PASRR Completion Detail Report	View
FED and PASRR Assessment	FED and PASRR Completion Summary Report	View
FED Assessment	Applicant Applied Or FED Completion Detail Report	View
FED Assessment	Applicant Applied Or FED Completion Summary Report	View
FED Assessment	FED Excuse Detail Report	View
FED Assessment	FED Excuse Summary Report	View
PASRR Assessment	PASRR Excuse Detail Report	View
PASRR Assessment	PASRR Excuse Summary Report	View
Redetermination and Desk Review	Annual Redeterminations and Desk Review Detail Report	View
Redetermination and Desk Review	Annual Redeterminations and Desk Review Summary Report	View

Note, that all but one report, *The FED and PASRR Average Days Report* has a detail and summary report available. Click on View to generate each report.

Enter the start and end date. Click on view report.

Start Date End Date

Organization Unit

Only reports related to your AAA can be viewed. From here, the report is generated. The ability to save in different file formats is available. We suggest downloading the report into excel so the various columns can be filtered in whichever way works best for your AAA.

Start Date End Date

Organization Unit

1 of 2

Date Executed: 3/4/2019 4:14:35 PM

Total Count: 95

Search Criteria:

Start Date: 4/1/2018

End Date: 4/30/2018

Organization Unit: Adams County Area Agency on

- Word
- Excel
- PowerPoint
- PDF
- TIFF file
- MHTML (web archive)
- CSV (comma delimited)
- XML file with report data
- Data Feed

Updates Report (Detail)

Organization Unit	Staff First Name	Staff Last Name	User Role(s)	Activity	Date Of Activity
Adams County Area Agency on Aging	Michael	Butler	FED Assessor	No Login Activity	N/A
Adams County Area Agency on Aging	Alex	Renea	FED Assessor	No Login Activity	N/A
Adams County Area Agency on Aging	amanda	bzzzzz	FED Assessor Supervisor	No Login Activity	N/A
Adams County Area Agency on Aging	Angela	SnappleFED	FED Assessor	Account Added	04/17/2018
Adams County Area Agency on Aging	Angela	SnappleFED	FED Assessor	No Login Activity	N/A
Adams County Area Agency on Aging	Ann	Adams	OU Admin	No Login Activity	N/A
Adams County Area Agency on Aging	Bella	Maggie	FED Assessor Supervisor	Account Added	04/17/2018
Adams County Area Agency on Aging	Bella	Maggie	FED Assessor Supervisor	No Login Activity	N/A
Adams County Area Agency on Aging	Bella	Maggie	FED Assessor Supervisor	Account Added	04/17/2018

How Calculate On-Time Completion Numbers

When running reports, we follow the requested FED through to completion to gather our on-time completion numbers to calculate their on-time percentage. Below is the breakdown of how we calculate those numbers.

Total Monthly FED Referrals	Run FED and PASRR Completion Detail report. Filter by requested month.
Total Number of completed FEDs in 10 days	Filter by completed, Review Requested, Reviewed Completed. Filter by late: No
Total Number of Withdrawn FEDS	Filter by withdrawn FEDs and deduct from requested.
Excused Late FEDs	Filter by yes in the column for late FEDs and count those that are excused.
Unexcused late	Filter by yes in the column for late FEDs and add those that are unexcused.
On-Time Percentage Rate	<ul style="list-style-type: none"> • Requested FEDs for the month- withdrawn=requested FEDs • Divide by the number of FEDs completed on time including excused FEDs gives the on-time completion percentage.