Magellan Healthcare of Idaho

Outcomes and Assessments System – Generating reports

Overview

Upon completion of assessments within Magellan's outcomes and assessments system (accessed via Availity Essentials), you may want to generate reports for internal use and/or to share with families, care teams, or the member within care. This step-by-step guide provides instruction on how to generate the various reports available.

Locate the member

There are three ways to access a member in the outcomes and assessments system:

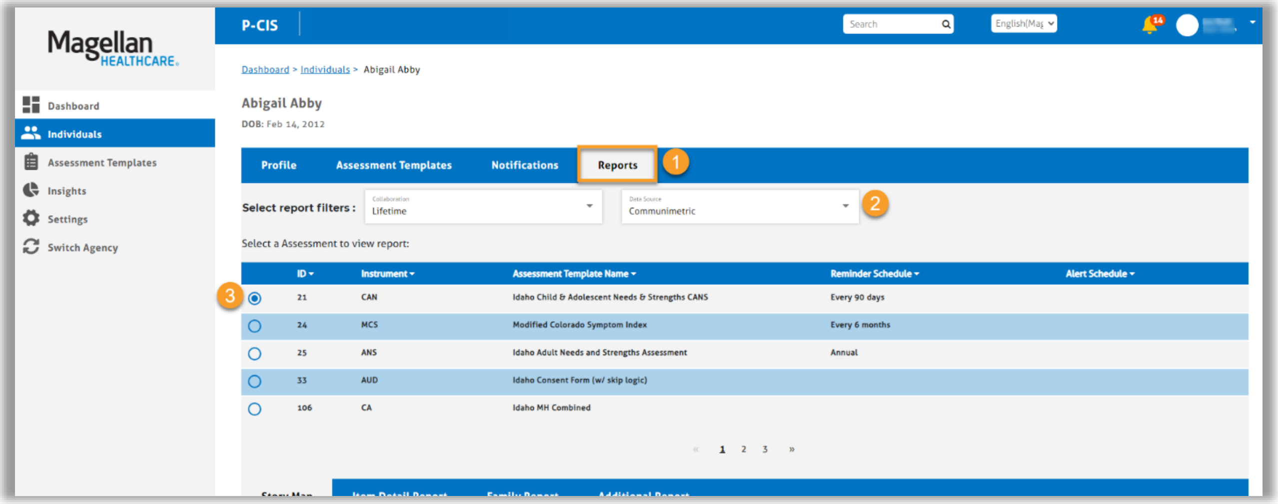
1. Using the Search Bar at the top of the page.
2. Using the Individuals module on the left-side navigation ribbon.
3. Using the Individuals table on the Dashboard.

NOTE: If you need additional assistance with locating members within the system, please reference the Searching for a Member Step-by-Step Guide on the Outcomes and Assessments Training page for guidance.

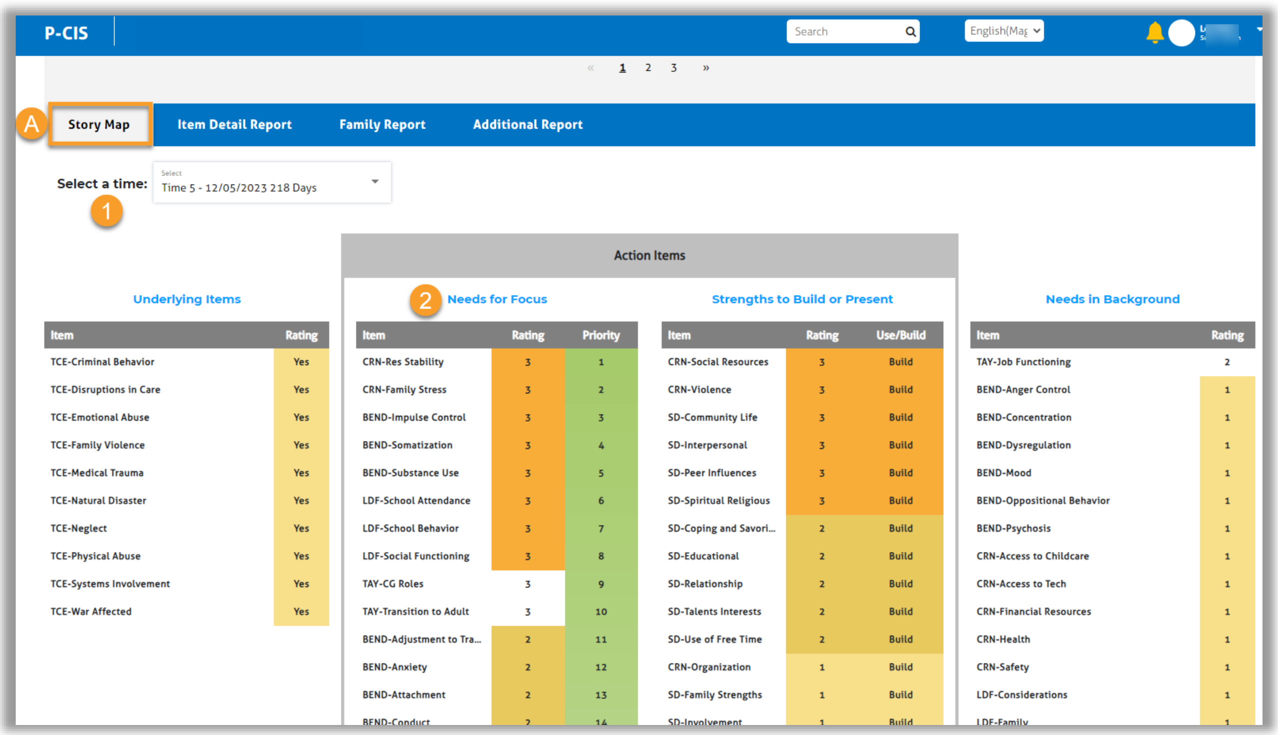
Generate a report

1. From the member's profile, click the **Reports** tab.
2. Select the report filters you would like to use for the report:
   A. **Collaboration** – Refers to the time of the assessment; filter by a specified collaboration or by **Lifetime** (for all times) assessments available.
   B. **Data Source** – Refers to who completed the assessment; filter by the method the individual used to collect information for the assessment.
      1) Some assessments, like the CANS, ANSA and POC, are "Communimetric," meaning they are developed as part of a team.
      2) Other assessments are completed directly by the member or a family member; if the member/family member completed the assessment, their name would be a data source in the drop-down.

   NOTE: Within this drop-down there is also an option to show a **Super Story**, which, if selected, will automatically compile a Story Map view of *all* assessment information to date.
3. Under the **Select an Assessment to view report** section, select the assessment for which you require the report by clicking the appropriate radio button.



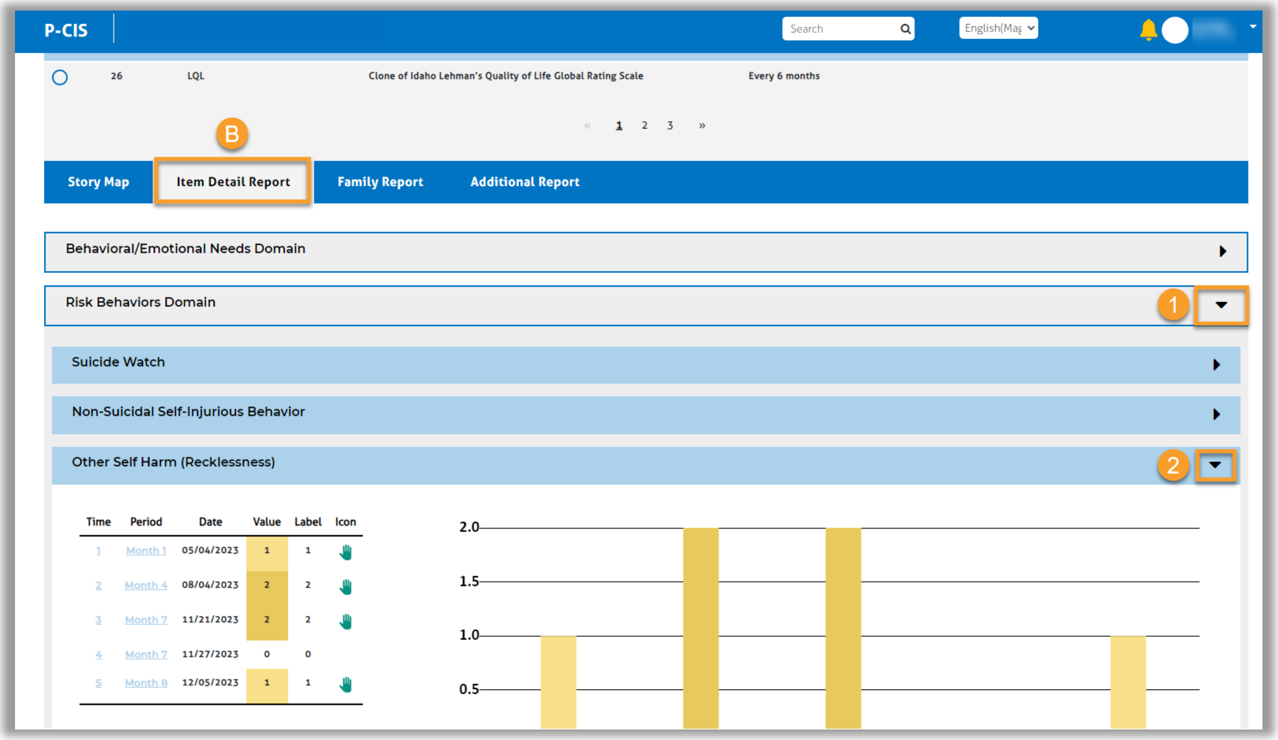
4. From the report screen, you have several options to view:
   A. **Story Map** – This default setting displays an overall view of the member's assessment results.
      1) Select a time – Within the drop-down, select which individual assessment you would like to view for the member based on when it was entered.



If applicable, you can drag and drop items under the **Needs for Focus** section to arrange priorities.

B. **Item Detail Report** – Generates a report for specific items within the selected assessment.

1) Click the **caret** ▶ next to a section to expand and see the subcategories within that section.

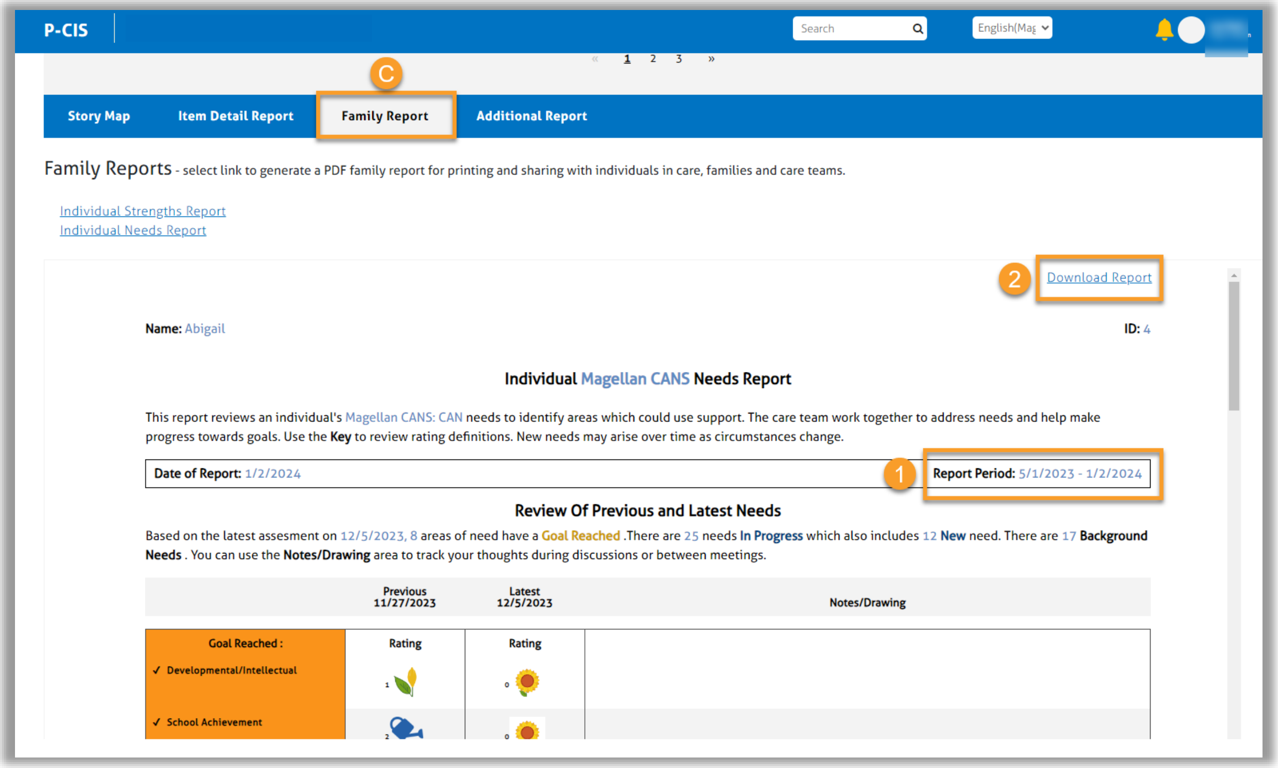


If applicable, click the caret next to the selected subcategory to see specific items and their scores.

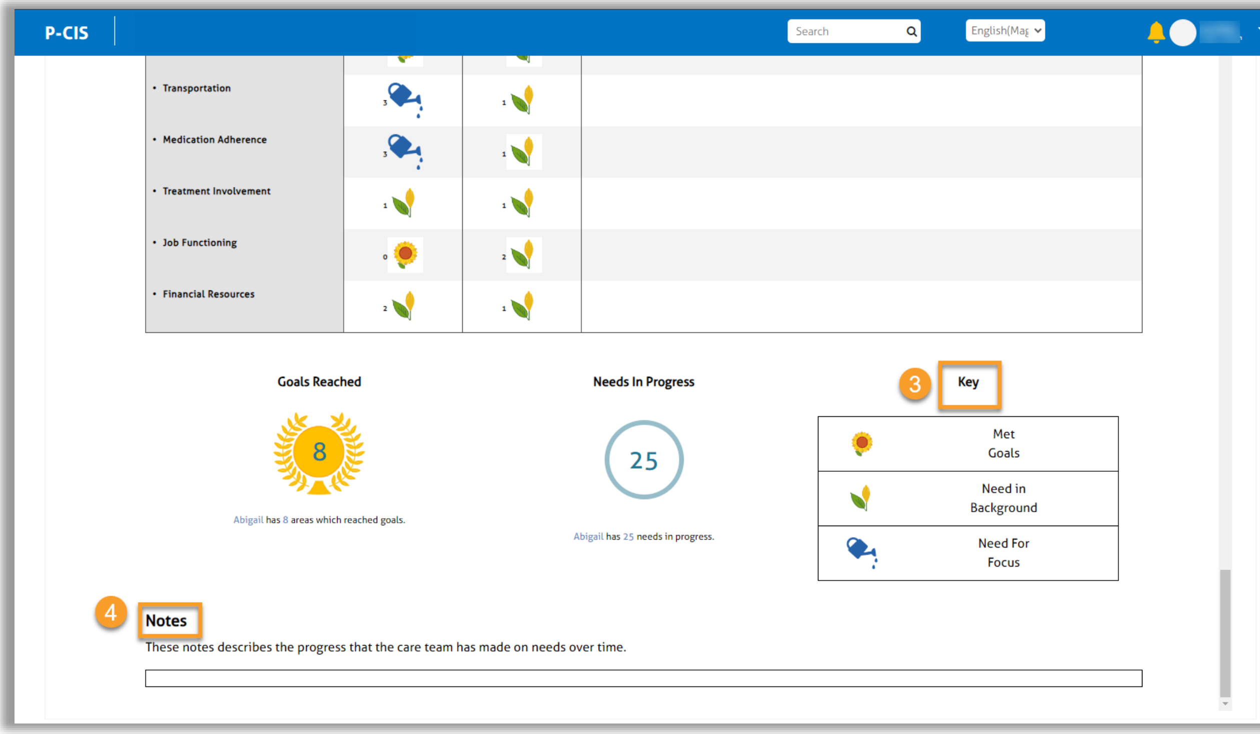
C. **Family Report** – Allows you to generate a specialized PDF report for printing and sharing with members in care, families, natural supports, and care teams; you can generate several Family Reports based on the assessment you select.

The reports generate based on the assessment question responses; the available Family Reports will be based on the information gathered from the specific assessment selected.

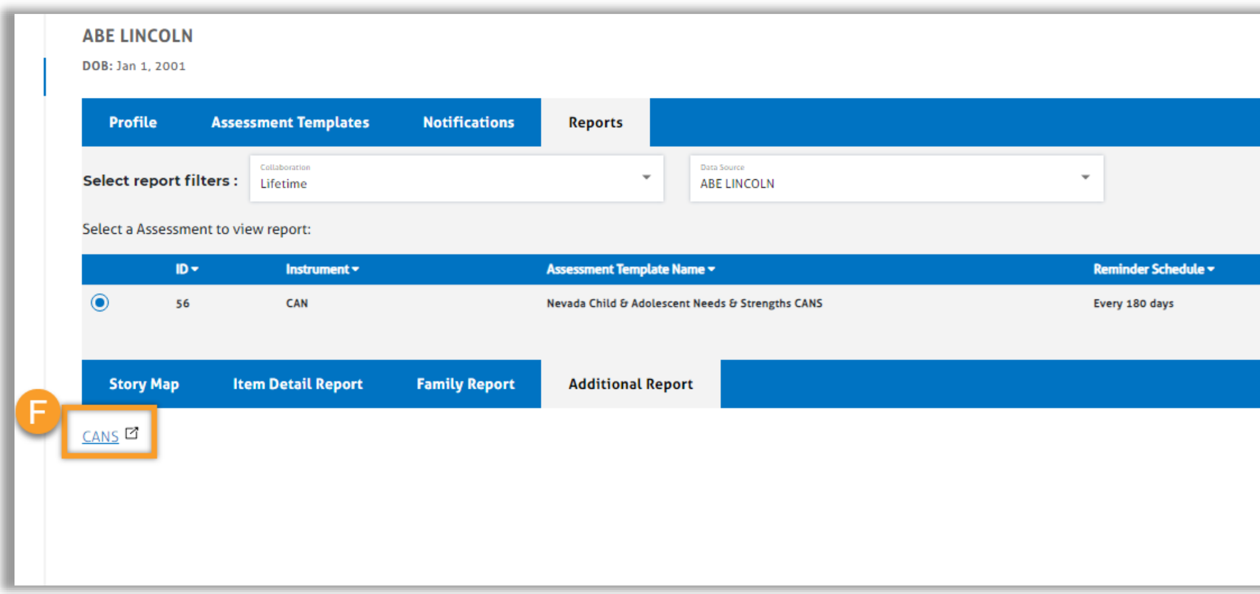
1) Each Family Report available for the selected assessment will show longitudinal data to reflect the individual's assessments over time.
2) To download reports as a shareable PDF, click the **Download Report** link at the top of the report.



3) Each Family Report will include a **Key** at the bottom to indicate what the various icons within the report represent.
4) Each Family Report will include a **Notes** section you can use to describe progress over time.



D. **Additional Report** – If configured for your organization/agency, additional reports will display here; if configured and shown, they will display the most recent version of the selected assessment.
E. Using the radio button, select the assessment you want to see.
F. Click the hyperlinked assessment name to open the report; if there is more than one report, there will be a drop-down with date options.



1) **Report filters** can assist in selecting the time and sources of the assessment.

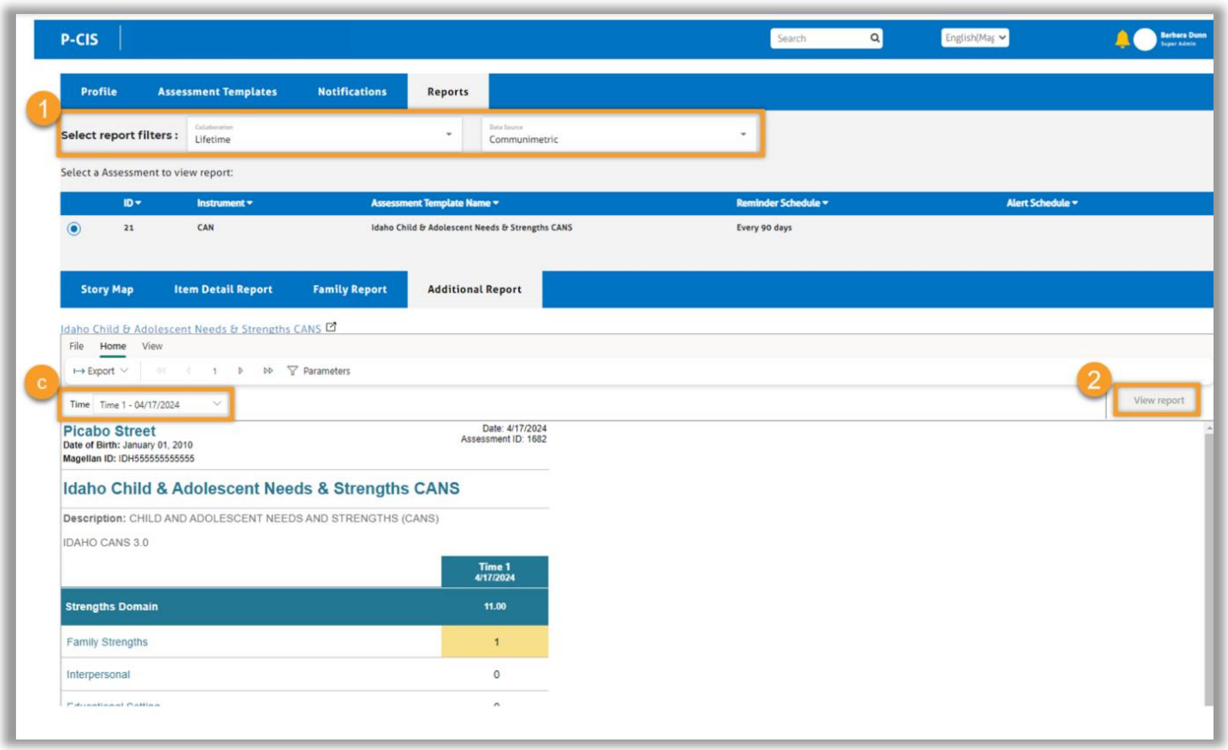
a. **Collaboration** – Refers to the time of the assessment. Filter by a specified collaboration or by **Lifetime** (for all times) assessments available.

b. **Data Source** – Refers to who completed the assessment.

- Some assessments, like the CANS, ANSA and POC, are "Communimetric," meaning they are developed as part of a team.
- Other assessments are completed directly by the member or a family member, and if the member/family member completed the assessment, their name would be a data source in the drop-down.
- Filter by the method that the individual used to collect information for the assessment.
  NOTE: Within this drop-down, there is an option to show a **Super Story**, which, if selected, automatically compiles a Story Map view of *all* assessment information to date.

c. **Time** – Allows you to select the date of a completed assessment within in the drop-down.

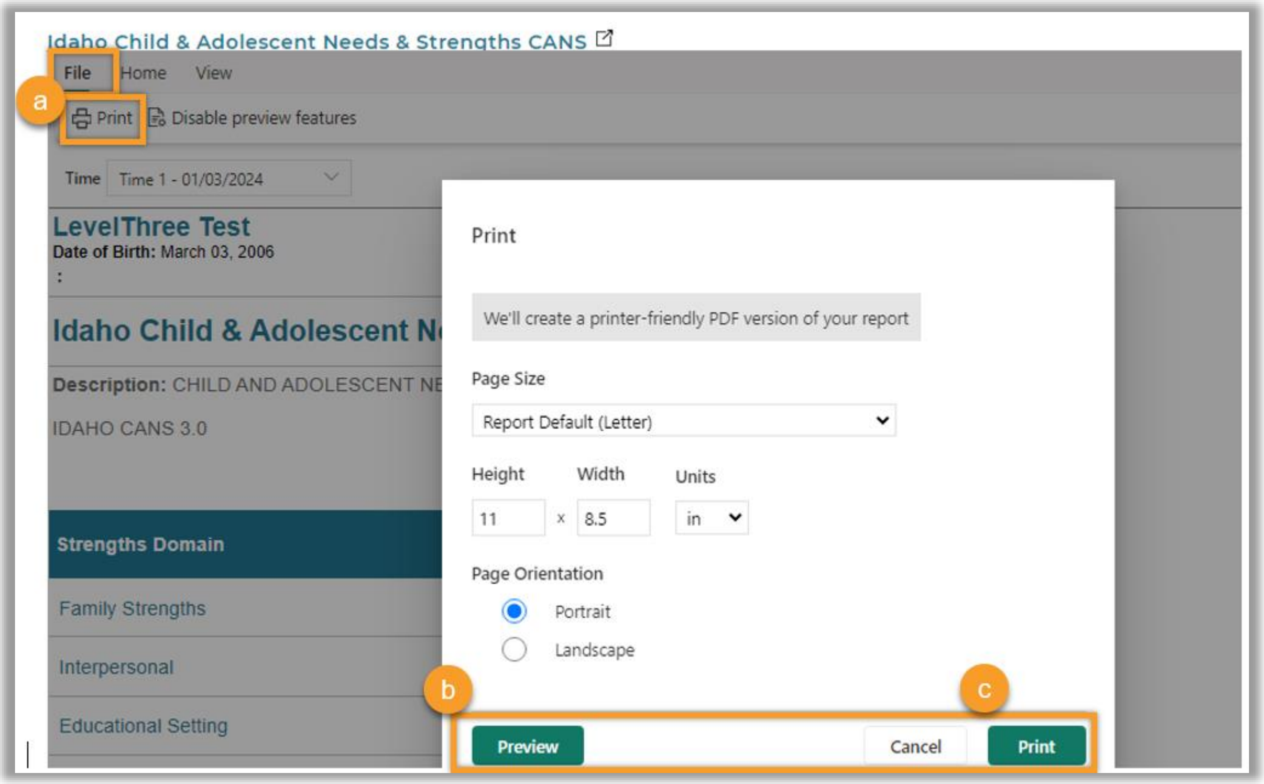
2) **View Report** – Clicking this button will produce a report for the date selected in the Time drop-down.
3) Use the arrow keys to view other pages on the assessments.



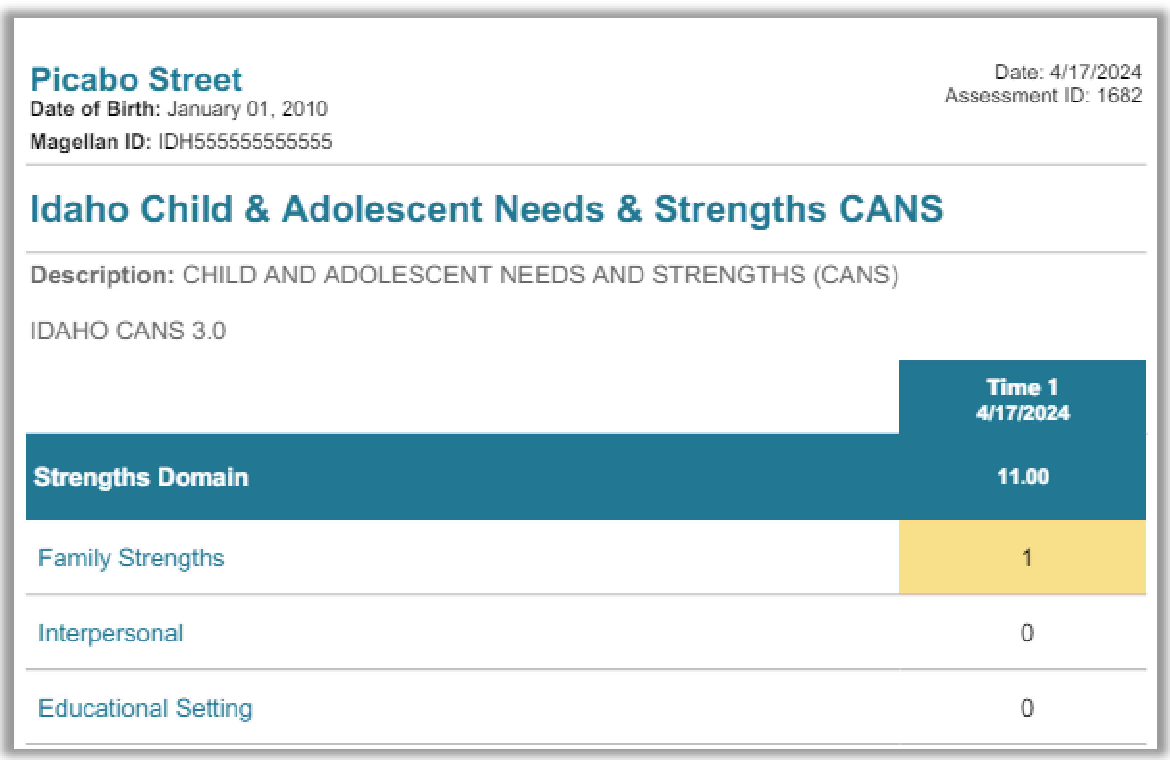
4) **Printing a Report as a PDF:**

a. To Print to PDF, select **File** and **Print**.

b. A **Print** prompt to **Preview** or **Print** will display.

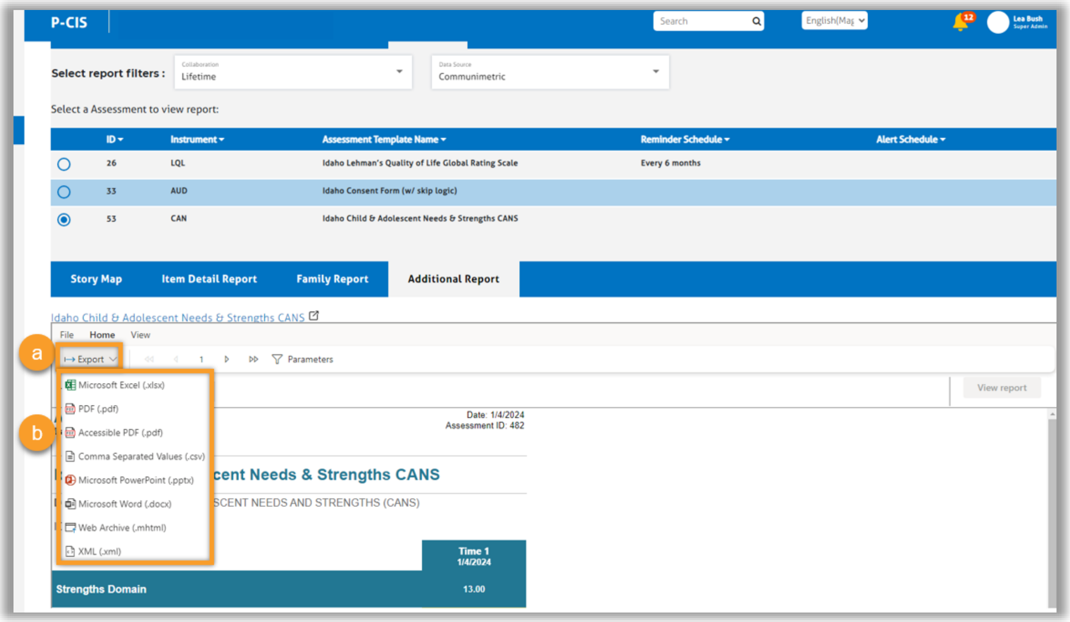


c. Click **Print** to create the PDF.



Once created, the PDF can be saved and attached to other records, as needed.

5) **Exporting the report:**
   a. You can also use **Export** to convert the data from the report into other formats or create a PDF.
   b. Click **Export** to see a drop-down menu of options for exporting data from a report.
   c. Select the method in which you want to receive the data; a report in that format will automatically generate for you to download/save.



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