# Downloading Your PS&R Report

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**Requesting Your Reports**

➢ You must first be fully registered with IDM and be a PS&R User for your agency. Register at: CMS Portal Registration Page

➢ Log into the PS&R System via the IDM Page of the CMS Website: PS&R Login Page

➢ Click on I Accept to enter the Enterprise Portal

➢ Enter your credentials and click Login

➢ From the menu along the top choose Request Report (if you have multiple providers, select which provider you want to work with then Continue)
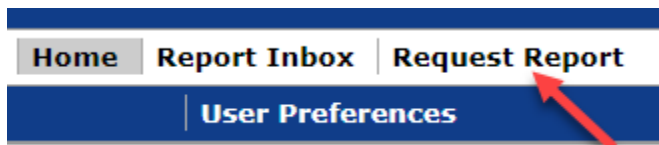


➢ From the next menu along the top choose Request Summary
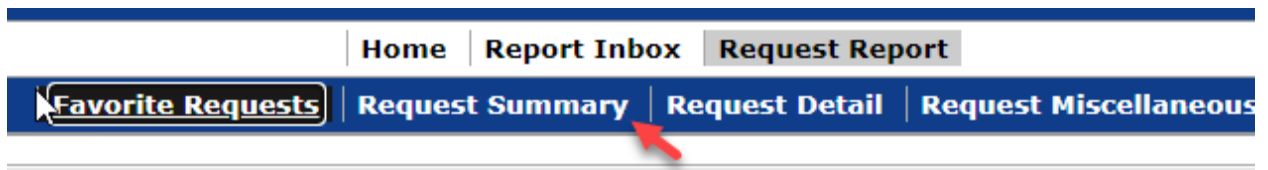


➢ On Step 1. Select Reports…. Choose the last item "By Report Type" which is the system default

➢ Scroll through the list of Available Report Types and choose all of them:

  o Select the first report listed under Available Report Types, hold the control key and scroll to the bottom and select the last report in the list, with all highlighted click the >> button to move them into the "Selected Report Types" window. Should look like this when done:

**Summary Report Request**

*\* Indicates Required Field*
Select the corresponding radio button to select reports By Service Type, By Report Group, or By Report Type. After selections

**1. Select Report(s)**

○ By Service Type

| All | ⌄ |
|-----|---|

☐ Exclude 329 and 339 Patient CBSA Visit Section ☐ Include 110 DRG Section ☐ Include 1000 Report
○ By Report Group
Search: [            ]

Available Report Groups (Hold Ctrl to select multiple)     \* Selected Report Groups (Hold Ctrl to select multiple)

| 11x | | |
| 12x | >> | |
| 13x | | |
| 14x | << | |
| 18x | | |

☐ Exclude 329 and 339 Patient CBSA Visit Section ☐ Include 110 DRG Section ☐ Include 1000 Report
◉ By Report Type
Search: [            ]

Available Report Types (Hold Ctrl to select multiple)     \* Selected Report Types (Hold Ctrl to select multiple)

| | >> | 110 IP - PART A |
| | | 115 IP - FEE REIMBURSED |
| | << | 118 IP - PART A MANAGED CARE |
| | | 119 IP - PPS INTERIM BILLS |
| | | 11A IP - PART A (MSP-LCC) |

☐ Exclude 329 and 339 Patient CBSA Visit Section ☐ Include 110 DRG Section

[Continue]

➢ Continue

➢ On Step 2. Enter Service Periods – Enter the Period 1 Start Date on the top section as:
01/01/2021 and click Apply

**Summary Report Request**

*\* Indicates Required Field*
Populate the Service Periods table below by using one of the following methods: Apply Dates by Interval to Service Period
button to proceed.

**2. Enter Service Periods (Format: MM/DD/YYYY)**

Apply Dates by Interval to Service Periods:

Interval: [ Year                          ⌄ ]  Period 1 Start Date: [01/01/2021] 📅 [Apply]

Once you click Apply, the date you entered in Period 1 Start Date will go away, no worries, it will
populate the periods below

➢ *This is important, please don't skip this step!*
Skip to the bottom section and Checkmark to Exclude each of the other periods not needed:
Period 2 – 2022, Period 3 – 2023, Period 4 – 2024 as these will print even with zeros and they
aren't needed.  You will be left with only Period 1 NOT checked to Exclude and that should be
2020.  If your screen looks a bit different, just make sure that the period NOT excluded is the full
year of 01.01.21 – 12.31.21.  It will look like this when done:

| Period 1<br>Exclude ☐ | | Period 2<br>Exclude ☑ | | Period 3<br>Exclude ☑ | | Period 4<br>Exclude ☑ | |
|---|---|---|---|---|---|---|---|
| From: 01/01/2021 | 📅 | From: 01/01/2022 | 📅 | From: 01/01/2023 | 📅 | From: 01/01/2024 | 📅 |
| To: 12/31/2021 | 📅 ☐ | To: 12/31/2022 | 📅 ☑ | To: 12/31/2023 | 📅 ☑ | To: 12/31/2024 | 📅 ☑ |

➢ Step 3. Leave as defaulted, Include all Paid Dates available

### 3. Enter Paid Dates (Format: MM/DD/YYYY)

◉ Include all Paid Dates available at time of report generation

○ * From: 08/01/2007 📅    * To: 01/27/2022 📅

[Back]    [Continue]    [Reset]

➢ Continue

➢ Step 4. Select Report Format – choose both PDF & CSV

### Summary Report Request

Select report format and choose the Continue button to proceed.

### 4. Select Report Format

○ PDF
○ CSV
◉ PDF & CSV
☐ Separate Files by Provider

[Back]    [Continue]

PDF is not an accessible form of report. Users with accessibility

   o **If you have multiple provider numbers under one Tax ID number, check to separate Files by Provider**

➢ Continue

➢ Step 5. Confirm Report Request – you can change the name of the Request, I normally use the agency name here.  But you can leave it as it is.

➤ Submit

**Retrieving Your Reports** – Depending on when you request your report, it may be available pretty quickly, within a few minutes.  Or you may need to log back into the system later to see if the report is available.  Sometimes this can take up to 2-3 days to be available although the system has greatly improved over the years and typically is available within 30 min or quicker.  To do so follow these steps:

➤ Log back into the PS&R site as shown above (if necessary)

➤ Along the top menu choose Report Inbox

| Home | **Report Inbox** | **Request Report** |
|------|------------------|--------------------|
|      | **User Preferences** |                |
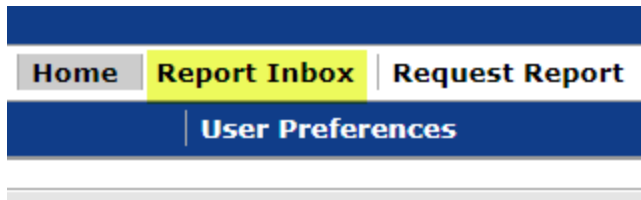
➤ You will see your request here, the Status column will show the status as Pending, Processing or Complete.

**Summary Report Inbox**

After 21 calendar days with a Status of "Complete" or "Error", the report request will no longer appear in this inbox. If the Status is "Complete", it is your responsibility during these 21 days to save the reports to your own cor

Data Definition Document for each report can be found in Appendix E of the PS&R User Manual.

| Delete ☐ | Request Name | Request Date | PDF | CSV | Status |
|----------|--------------|--------------|-----|-----|--------|
| ☐ |  | 01/26/2022 | (PDF, 551 KB) | CSV | Complete |

➤ Once the status is Complete you can download each report

  o PDF link and save to your desktop and

  o click on the CSV link and save to your desktop (you may have 2 CSV files, save both of them)

➤ Please upload or email all files (PDF & CSV) to us for processing, we need these reports in electronic form and not faxed or mailed.

➤ These reports only remain in your inbox for 21 days, please make sure they don't expire before you download them.

HELP DESK:  EUSSUPORT@CGI.COM     866-484-8049