Wisconsin County Waiver Agency (CWA) Children's Long-Term Support (CLTS) Program Guide to SAS

WISCONSIN DEPARTMENT *of* HEALTH SERVICES

Version 1.0 (09/2024)

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SAS Basics

1.1 Introduction

SAS Institute is the vendor for the Wisconsin Department of Health Services (DHS) Enterprise Data Warehouse/Data Analytics and Reporting (EDW/DAR) Solution commonly just referred to as SAS. SAS provides county waiver agencies (CWAs) access to program data on an ongoing basis and includes data from the Medicaid Information Management System (MMIS), Functional Screen Information Access (FSIA), and the CLTS third-party administrator.

1.2 Getting access to SAS

Access to CLTS data through SAS is granted through the ForwardHealth Portal. Contact your agency's ForwardHealth CWA administrator to request access to SAS Data Mart (a.k.a. SAS). Each CWA's admin is responsible for determining who should have access to their data.

For more information about the waiver agency portal see the Eligibility and Enrollment User Guide here: https://www.dhs.wisconsin.gov/publications/p01991.pdf

1.3 Logging on

1.3.1 Where to access SAS

Web address: https://prod.widhs.cloudanalytics.sas.com/SASDrive/

1. Click "Use your corporate credentials."
2. Enter work email address and click "Next."
3. Enter username and password and click "Sign in."

NOTE: The username and passwords for #3 are the same as the ones used to log into the ForwardHealth Portal.
NOTE: When SAS opens it will be on the "SAS Studio" page.

1.3.2 Troubleshooting

1.3.2.1 Resetting a password

- Go to: www.forwardhealth.wi.gov.
- Click the Login link in the upper right-hand corner.
- Click "Forgot Your Password?" in the middle of the page.
- Follow the prompts to reset your password.

1.3.2.2 Other issues with SAS

SAS WI DHS Helpdesk: widhs-helpdesk@sas.com

The SAS Help Desk can help with topics like:

- Login issues
- Verifying which URL (website link) to use
- Password resets
- Error messages
- Finding reports

Bureau of Children's Services (BCS) Technical Assistance Center (TAC) Inbox: DHSBCSTAC@dhs.wisconsin.gov
The staff who answer questions sent to the TAC Inbox can help with:

- Running reports
- Understanding reports
- Creating new reports

Have a question about a topic not listed above? Send it to the BCS TAC inbox, and the staff can help you find the answer.

1.3.2.3 Definitions of terms used in this guide

Data tab—Tab seen when running a report, includes directions for running the report and data fields to enter when requested.

External user—Non-DHS staff, county SAS users.

File—The file in the Program Participation System (PPS) that has the data on a child while they participated in the program (from referral to close). A child may have multiple files in PPS.

File name—The name of the report being run in SAS

Folder—Location in SAS where documents (e.g., reports that have been run) are stored by a user.

Information tab—Tab seen when running a report, includes properties of the report such as name and description.

Master Client Index (MCI)—A number given to a child in PPS from an application that is used to identify a person in different programs across the state.

Output—The resulting report that is made when a prebuilt report is run, a completed report.

Output tab—Tab seen when running a report, includes where to save the report once it is run and the name of the report.

Output location—Field on the output tab where user chooses where to save a report being run, indicates where to find the resulting report.

Pane—Section of the screen that is separated from other sections like a window with separate panes, may also think of them as columns or navigation bars on the screen.

Record—Refers to the files in PPS that are all under the same child. A child may have multiple files in one record. A child should not have multiple records in PPS.

Report—Has multiple meanings:

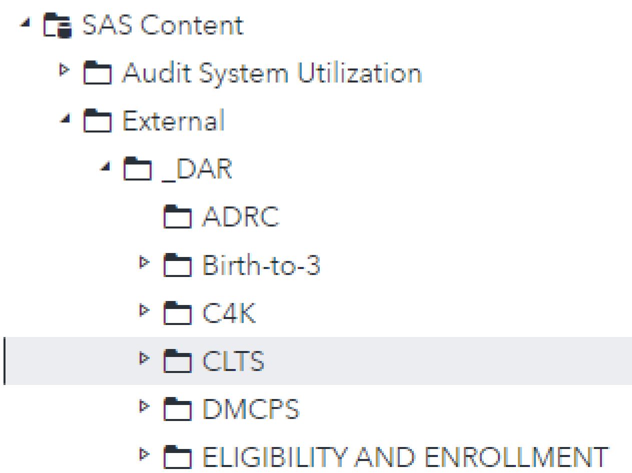
1. The prebuilt report—report provided by DHS to run.

2. The result of running a prebuilt report, the data pulled for the county to review.

1.4 SAS folders

Each SAS user will have access to the following folders for CLTS:

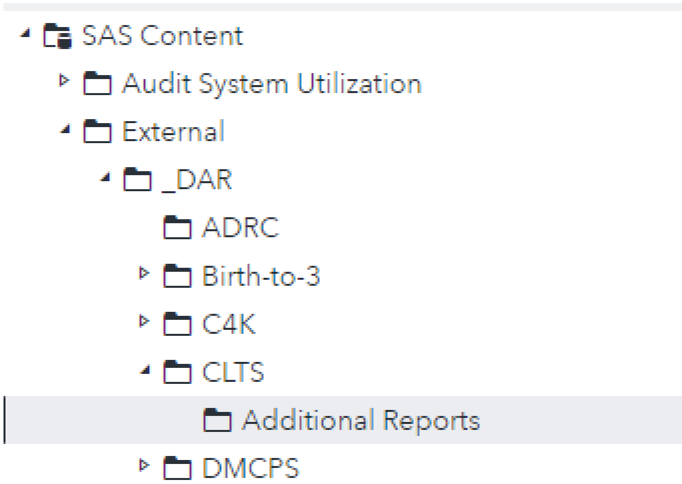
SAS Studio/SAS Content/External/DAR/CLTS



Where the following prebuilt reports are found:

- BCS Monthly CLTS Recert Report
- BCS Monthly CLTS Rescreening Report
- BCS Weekly CLTS Waiver Link Report
- BCS Weekly CLTS Waiver Member Enrollment
- CLTS Authorization Reports
- CLTS Reconciliation Template

SAS Studio/SAS Content/External/DAR/CLTS/Additional Reports

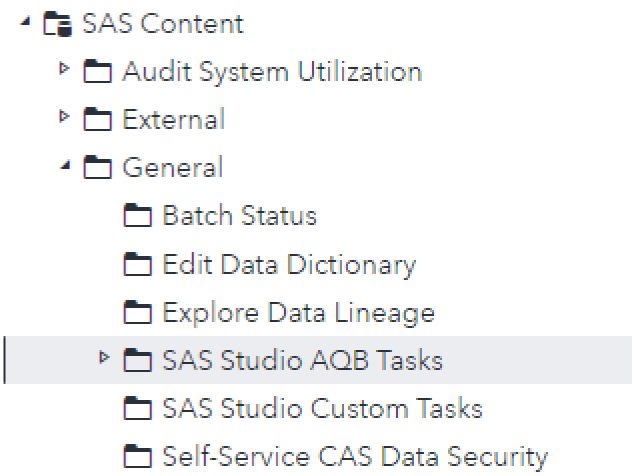


This folder will be used to share reports developed by BCS.

- CLTS Claims Extract V1

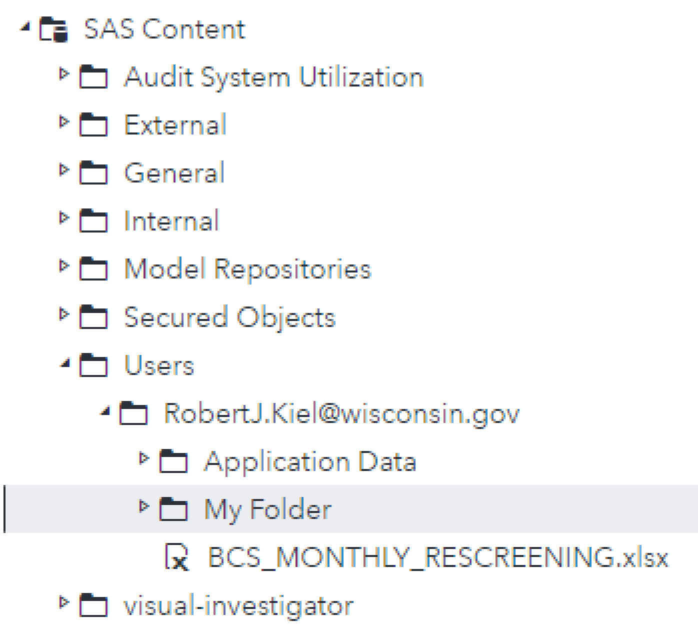
- CLTS Claims Extract V2
- CLTS Claims Extract Summary

SAS Studio/SAS Content/General/SAS Studio AQB Tasks



This folder contains advanced query builders (AQBs)

SAS Studio/SAS Content/Users/(User's email)/My Folder



Where reports the SAS user ran are saved

1.5 Finding a SAS data mart report

1. From the SAS Studio/Develop SAS Code page of the SAS data mart, scroll to SAS Content.
2. Open it up by clicking on the arrow preceding it.
3. Find "External" and click on the arrow preceding it.

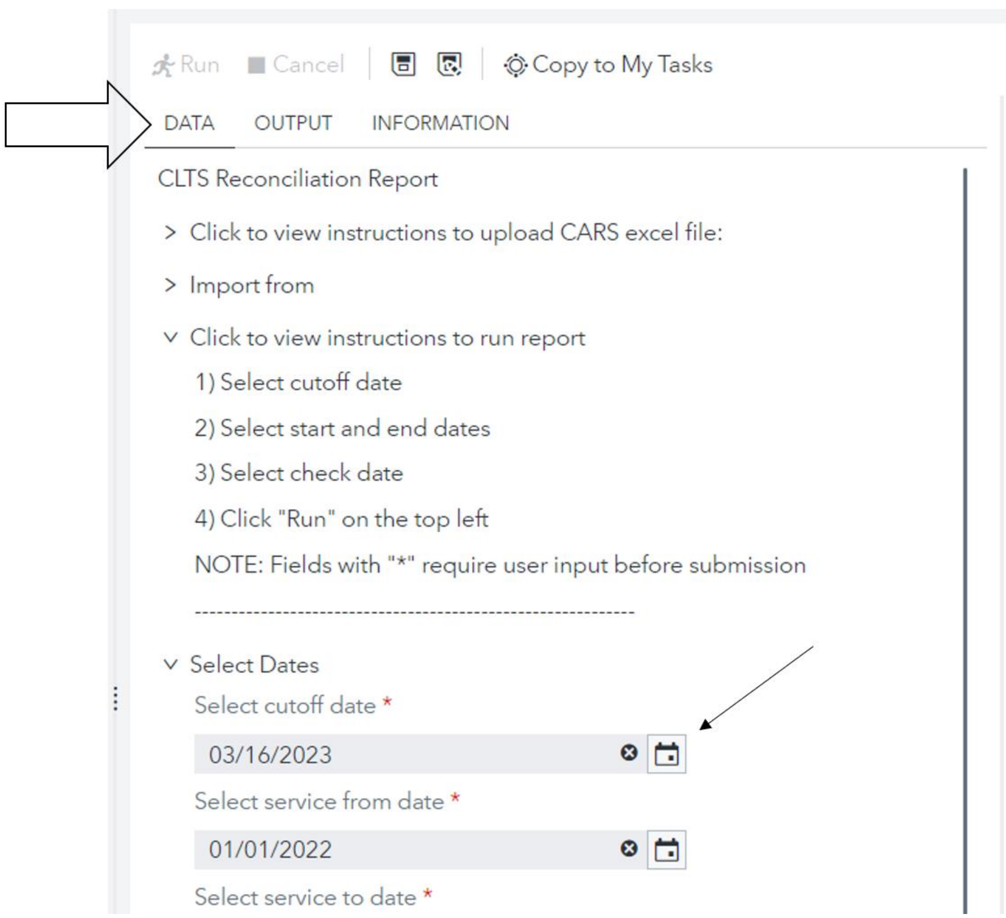
4. Scroll down to CLTS.
   Some reports are here and are run from this folder.
5. Click the arrow preceding it.
6. Find “Additional Reports” and click the arrow preceding it to open.
   Some reports are here and are run from this folder.

1.6 Running a SAS prebuilt report

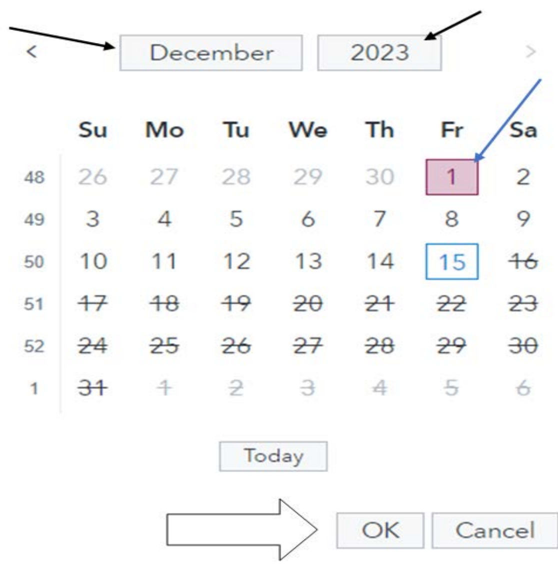
NOTE: To complete the steps to run a report users will be asked to move between tabs; moving from tab to tab does not erase/delete what was entered on a different tab.

1.6.1 To run a report

1. Double click on the name of the report.
   The report will open on the right side of the screen.
2. Read the instructions on the “Data” tab.
   If applicable, enter the prompted information (often a date).
   Note: Use the scroll bar on the right to get to the fields.
    - Click on the calendar icon for the first date field.

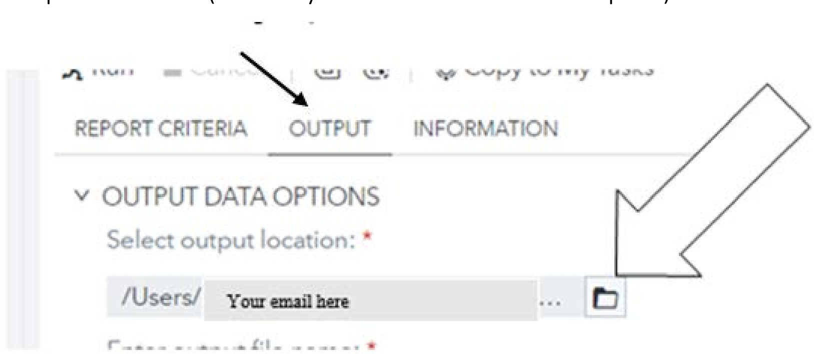


- Change the year by clicking the year box (top right) and choosing the year wanted.
- Change the month by clicking the month box (top left) and choosing the month wanted.
- Choose the day of the month to use (see blue arrow).
- Click "OK."



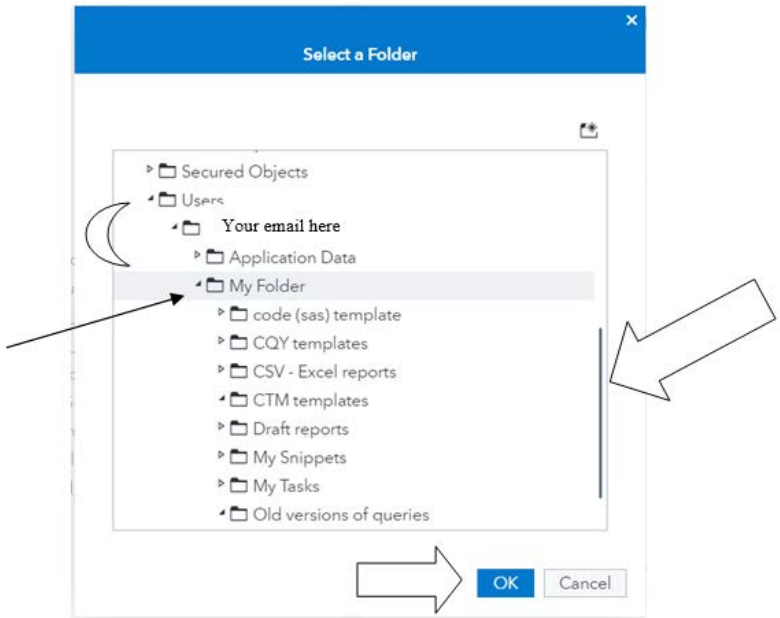
- Repeat steps above for any additional required fields.

3. Click the "OUTPUT" tab.
4. Click the folder icon at the end of the field.
5. Select output location (where you want to save the report).



A new box will open to choose the folder to save the report in.

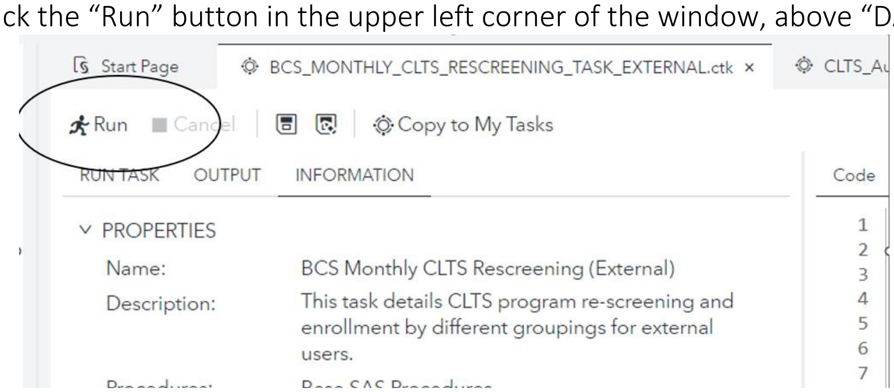
6. Choose where to save the report:
   - Scroll down using the scroll bar on the right side.
   - Find the SAS user’s email address under “Users.”
   - Highlight My Folder.
   - Click blue “OK” button.



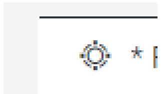
On the Output tab, the name on the report being run can be changed. **Note:** This step is not required.

- Click in the “File Name” box and change the name of the report.
- Click outside the “File Name” box.
- Go back to the DATA tab for further instructions.

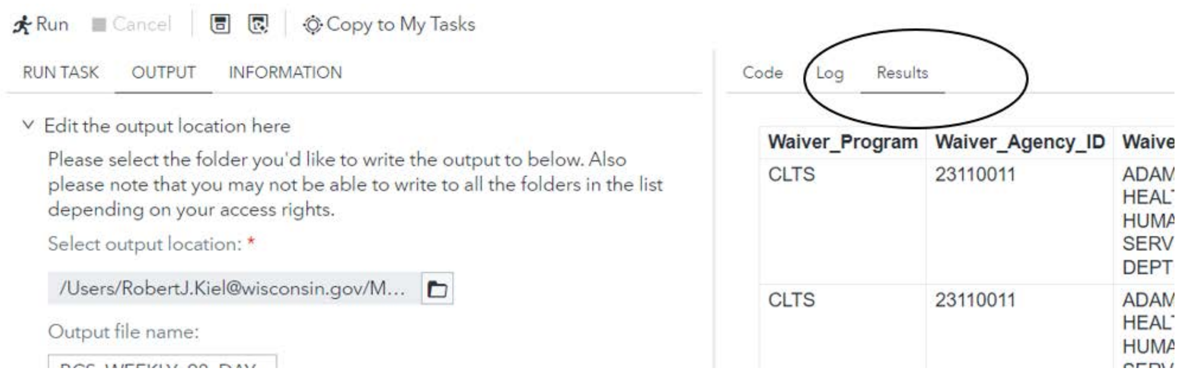
7. Click the “Run” button in the upper left corner of the window, above “DATA” tab.



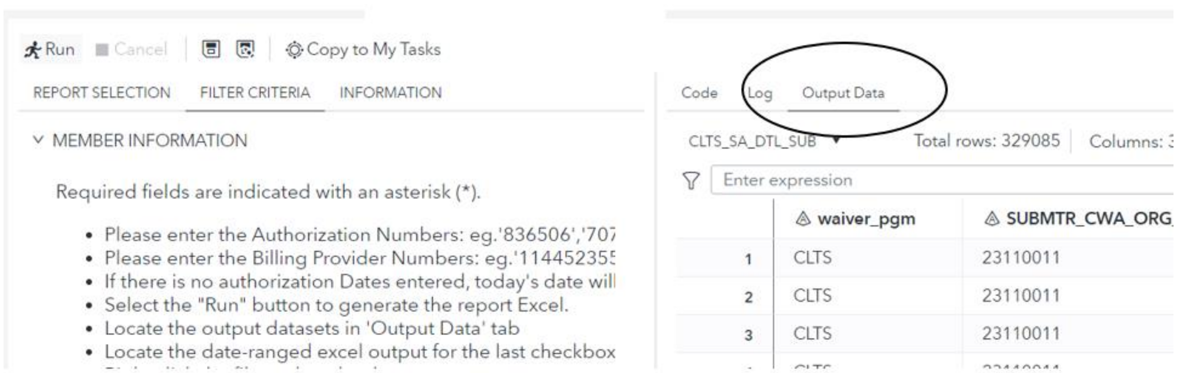
8. Once the report has run, two things will be seen:
   The following symbol in front of the name of the report that was run (.ctk tab)



And one of the following windows indicating a) the report is completed – see Results and/or Output Data:



Or:



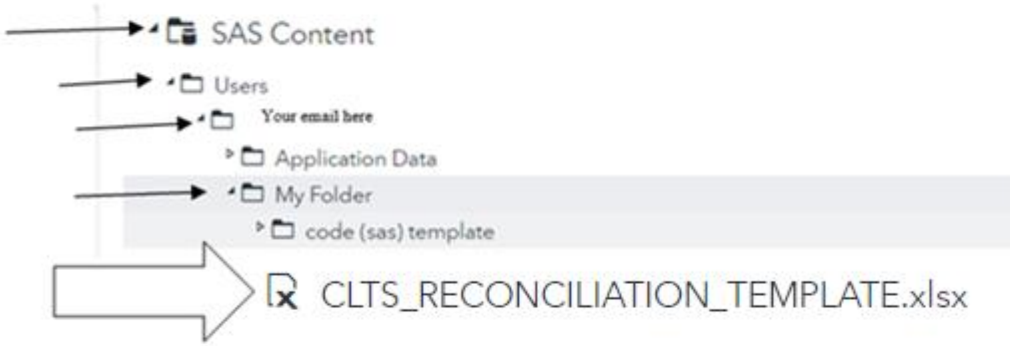
1.6.2 To open and save the report to the SAS user's computer

Note: Most reports that are run will be saved in "My Folder." The reports will appear in alphabetical order by name. Each report will have a date at the end of it (DD/MMM/YYYY)—see the orange rectangle in the screenshot below.

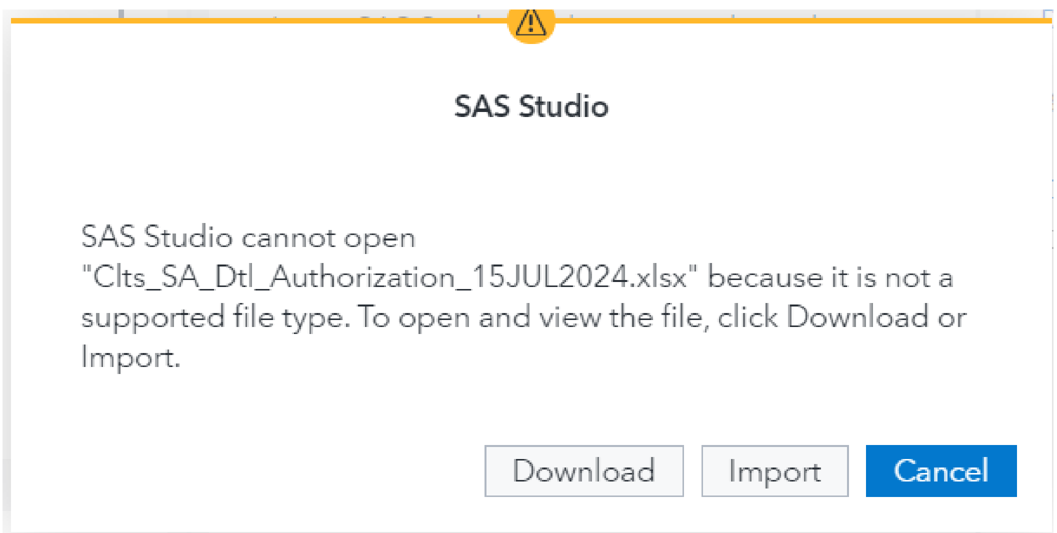
Note: If the same report is run multiple times on the same date, the newly run report will replace the previously run report. The name of the report via the Output tab can be changed prior to running it in order to keep both versions. (See instructions on page 8.)

1. Scroll down within SAS Content to Users.
2. Click the arrow preceding it.
3. Click the arrow preceding user's email.
4. Find "My Folder" and click the arrow preceding it.

5. Find the report ran by its name; it ends with .xlsx.
6. Double click the report name.



7. When another box opens, click "Download."

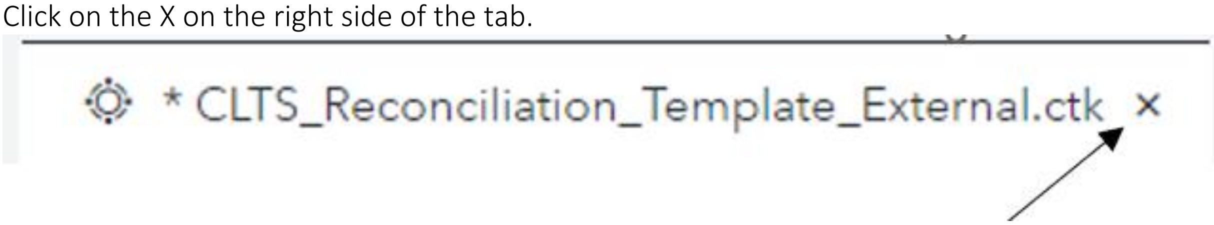


8. Find the downloaded report on the user's computer and open it.
   Note: Downloads may show up as a tab at the bottom left of the screen, in a box in the upper right, etc.
   Note: It opens as an Excel document. It can now be saved to the user's computer.

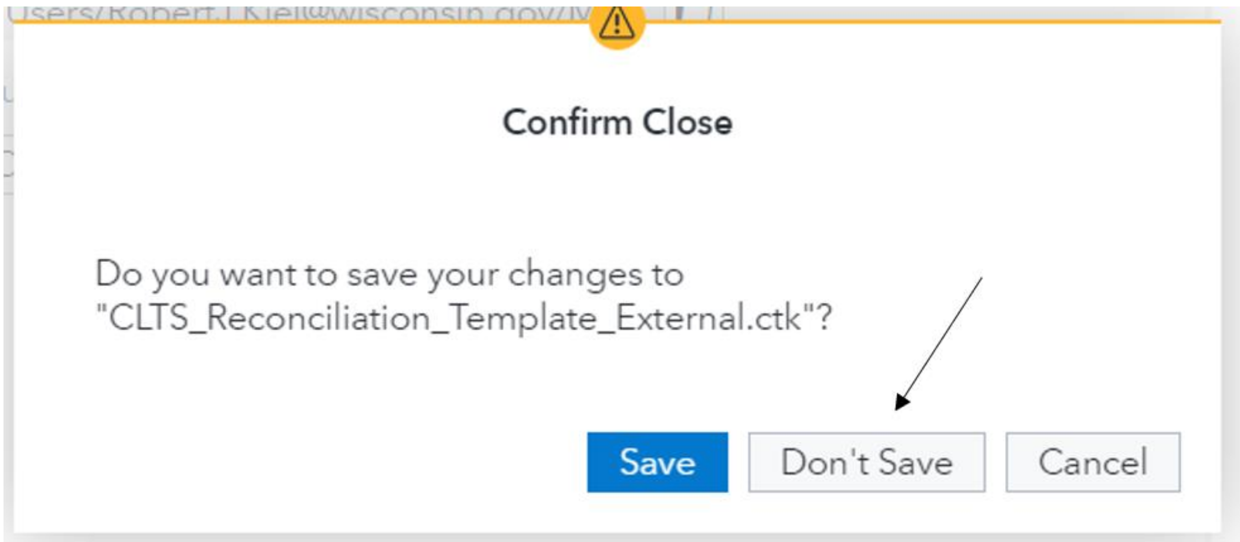
1.6.3 To close the report in SAS

Close the CTK tab:

1. Find the tab for the report ran you want to close.
2. Click on the X on the right side of the tab.



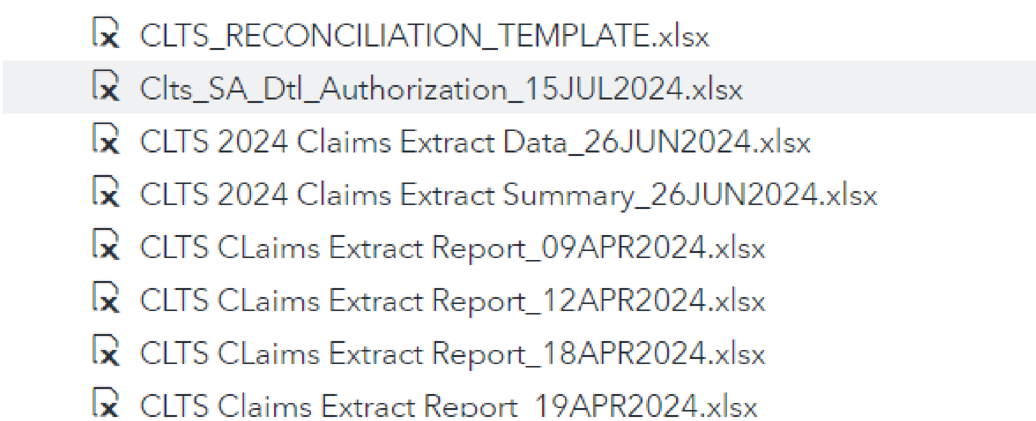
3. Another box opens.
4. Click “Don’t Save” button.



1.7 Cleaning up user’s folders in SAS

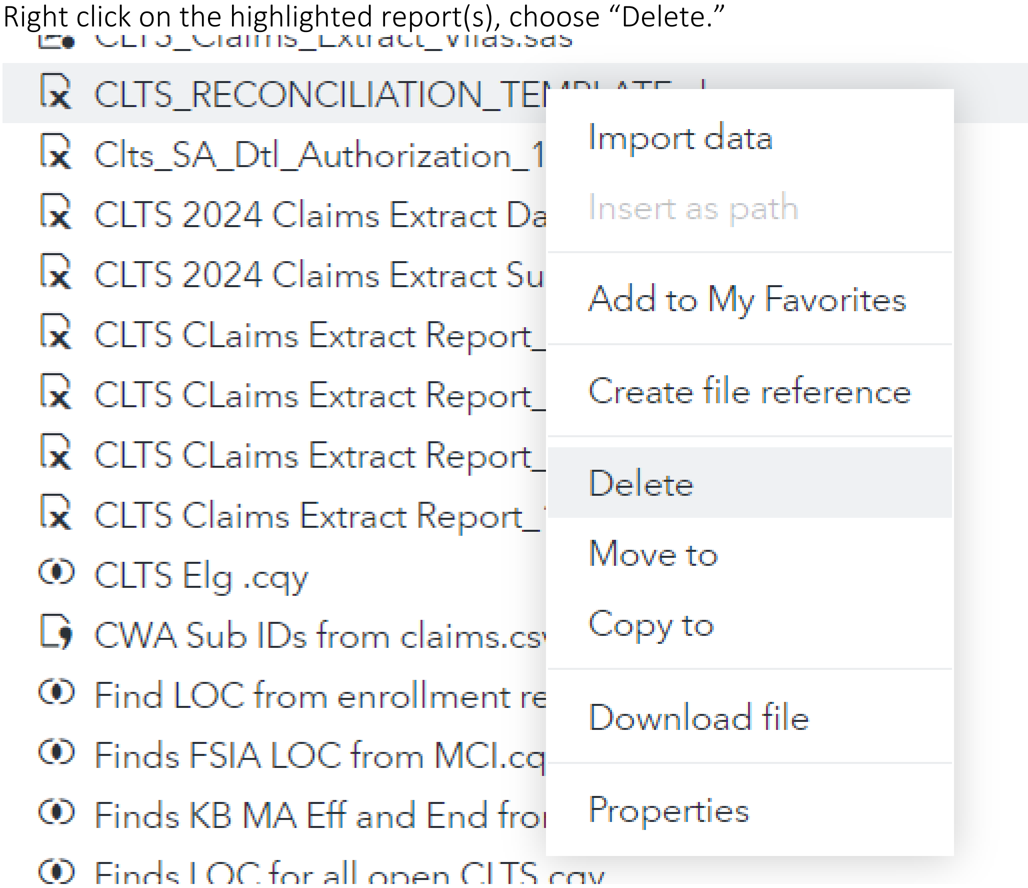
1.7.1 To delete reports already run and no longer needed

1. Go to “My Folder.”
2. Click the arrow in front of it.
3. Scroll down to find list of reports run, all ending in .xlsx.
   (Usually SAS Content/Users/(users email)/My Folder)

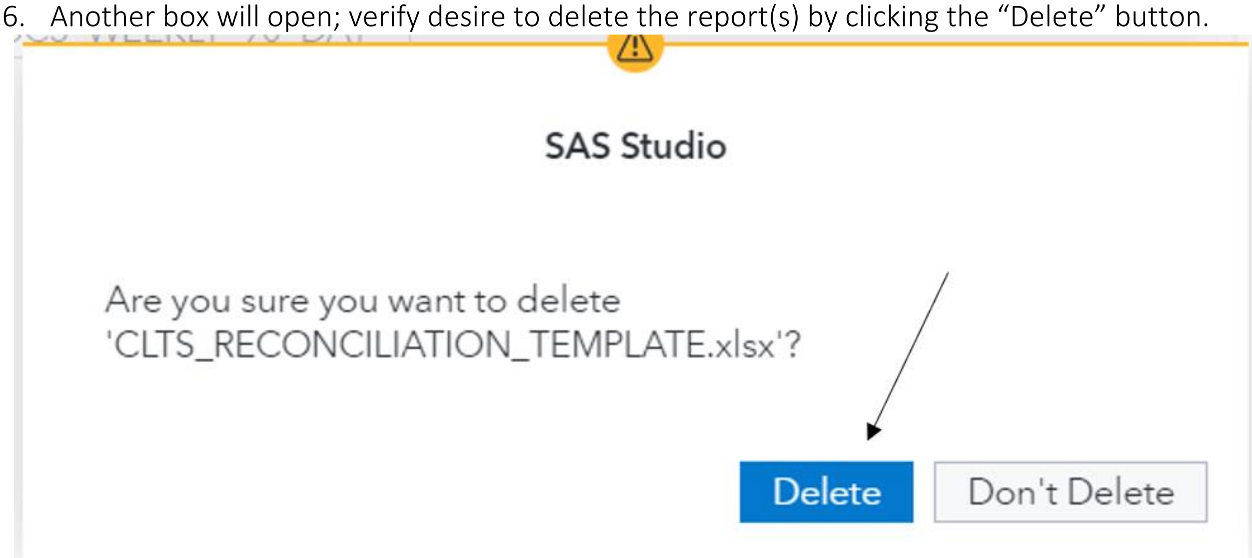


4. Highlight the report(s) to delete by clicking on it.
   NOTE: To delete more than one report at a time, highlight on one report, hold the Shift key down and highlight another report, all reports between the two will now be highlighted.

5. Right click on the highlighted report(s), choose “Delete.”

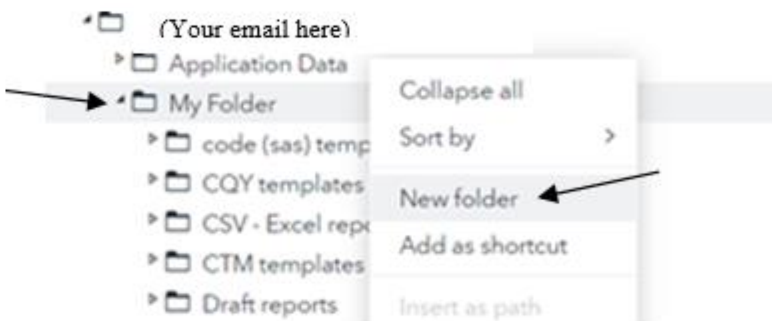


6. Another box will open; verify desire to delete the report(s) by clicking the “Delete” button.

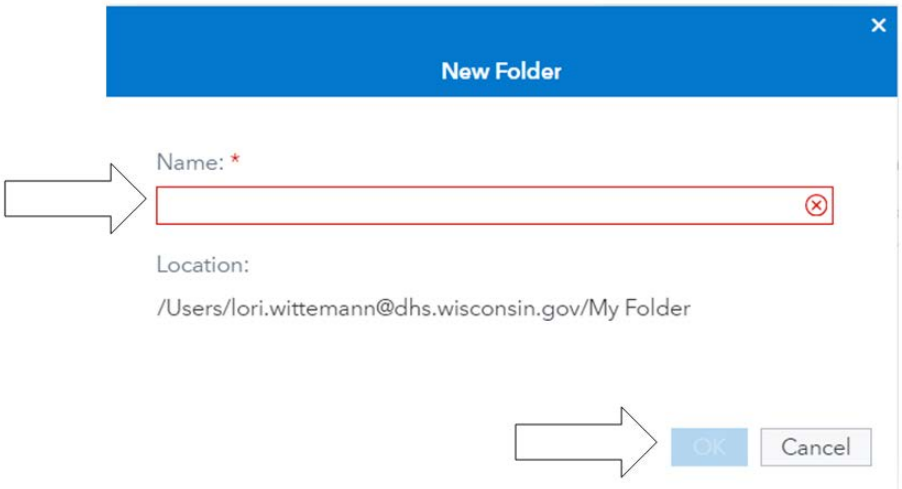


1.7.2 To add more folders under “My Folder”

1. Highlight “My Folder.”
2. Right click on it and choose “New folder.”



3. Another box will open; enter the name for the new folder in the “Name” field.
4. Click blue “OK” button in bottom right corner



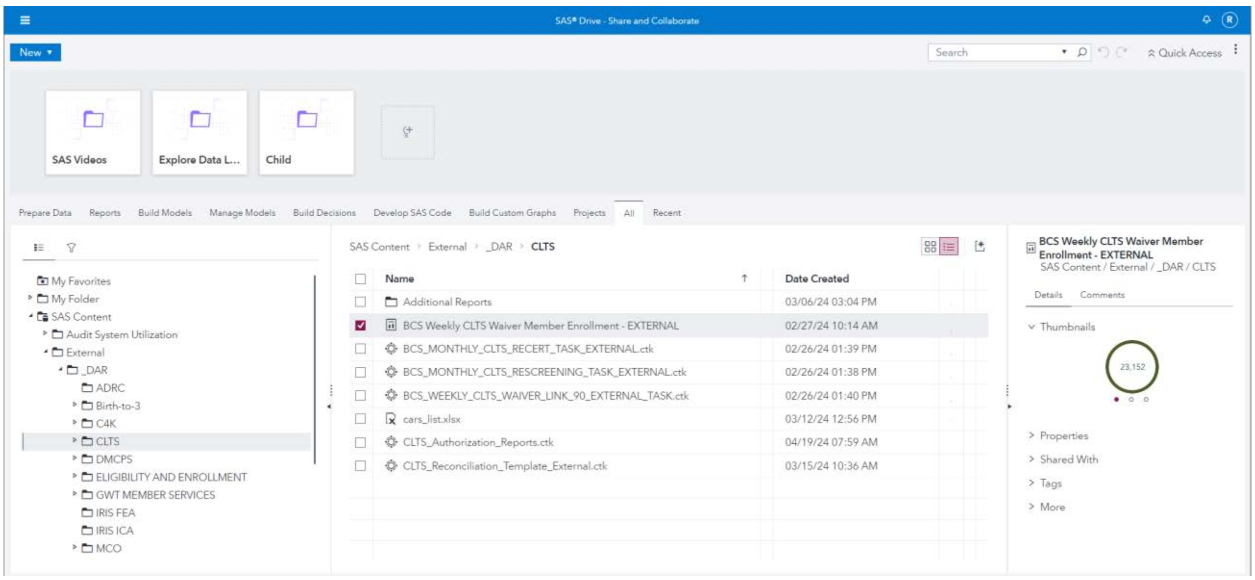
The new folder will be under “My Folder”
Note: New folders are listed in alphabetical order.

CLTS SAS Prebuilt Reports

2.1 Weekly CLTS Waiver Member Enrollment

Note: This report is an interactive visual analytics report; the data can be exported in an excel format which includes additional data fields by using the export option from the object menu icon (three vertical dots) located in the right corner of a report object.

Unlike the rest of the reports in this guide, this report is not accessed in SAS Studio/Develop SAS Code. To access the report from SAS Drive, double click the report name and it will open in SAS Visual Analytics.



2.1.1 Overview of report

This report is used to track county CLTS enrollment and disenrollment along with Medicaid benefit plan information.

2.1.2 Report tab descriptions

- Currently Enrolled Tab—Lists kids who had active enrollment in the past week. Report includes:
  - Address
  - CARES case number
  - Date of birth

- Katie Beckett details (Note: currently, the end date for Katie Becket is based on the child's 19^{th} birthday, not next renewal date)
    - Medicaid benefit plans
    - Waiver enrollment
- Predicted Disenrollments Tab—Lists kids scheduled for disenrollment at the end of the current and next calendar months. Must be for these reasons:
    - The child ages out of the program. This happens on the last day of the month they turn 22.
    - The child loses functional eligibility.
    - The child's Medicaid ends.
    - The recertification due date falls within the reporting period.
    - A yearly functional screen or level of care determination is due.

2.1.3 Application of report

This report can be used for a number of applications.

- Currently Enrolled Tab
    - Full listing of all enrolled participants
    - Identifying participants sources(s) of Medicaid and if they may be ending soon
- Predicted Disenrollments Tab
    - Find participants that are set to lose Medicaid
    - Find participants due for a functional screen
    - Find participants that are due for an annual certification
    - Find participants who will be aging out at 22

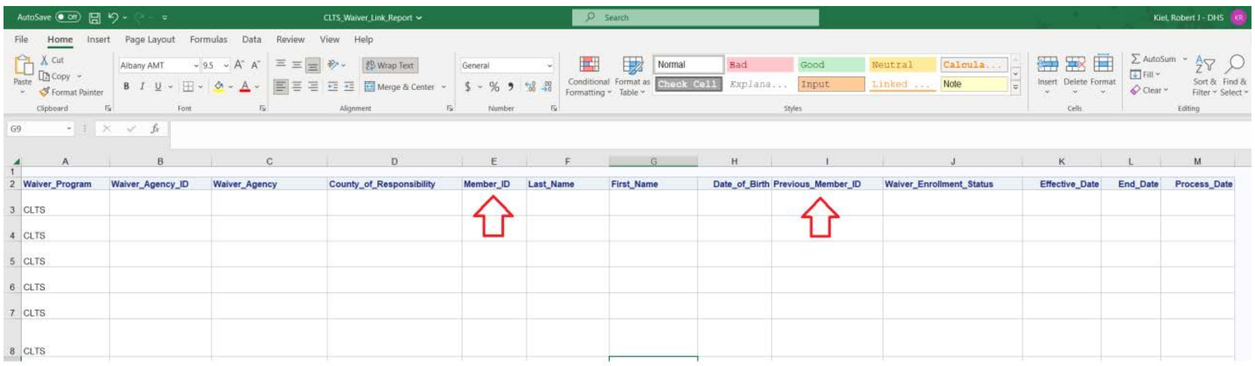
2.2 Weekly CLTS Waiver Link Report

2.2.1 Overview of report

This report identifies enrolled with more than one Master Customer Index (MCI) who had records linked in the past month.

2.2.1 Report tab descriptions

The report only has one tab. The member ID lists the current active ID and previous member ID is what it changed from.



2.2.2 Application of report

Used to identify MCI number changes.

2.3 Monthly CLTS Recert Report

2.3.1 Overview of report

Combines ForwardHealth enrollment and FSIA functional screen data. This report categorizes participants based on their annual recertification due date from ForwardHealth.

2.3.2 Report tab descriptions:

- **Enrolled within last 90 days**: Includes all participants with enrollment at any point in the prior 90 days
- **Recert Due Now**: Includes participants with a screen due in the current month
- **Recert Due Within 1-3 Mo**: Includes participants with a screen due in the next 3 months
- **Recert Due Within 4-6 Mo**: Includes participants with a screen due in the next 4-6 months
- **Aging out**: Includes participants enrolled and over age 17 years 6 months
- **Recert Past Due**: Includes participants with a screen due in the past
- **Disenrollment Last Month**: Includes participants with an end date in the prior month
- **Disenrollment Run Month**: Includes participants with an end date in the current month
- **Disenrollment Next month**: Includes participants with an end date in the next month

2.3.3 Application of report

Used to find participants who have their annual program recertification due based on the recertification due date in ForwardHealth.

2.4 Monthly CLTS Re-screening Report

2.4.1 Overview of report

Combines ForwardHealth enrollment and FSIA functional screen data. The report calculates rescreen due date based on the most recent screen calculated date in FSIA and calculates due date one year from that date.

2.4.2 Report tab descriptions

Note: A child may appear on more than one tab if they meet the criteria for multiple.

- **Enrolled within last 90 days**: Includes all participants with enrollment at any point in the prior 90 days
- **Rescreen Due Now**: Includes participants with a screen due in the current month
- **Rescreen Due Within 1-3 Mo**: Includes participants with a screen due in the next three months
- **Rescreen Due Within 4-6 Mo**: Includes participants with a screen due in the next four–six months
- **Aging out**: Includes participants enrolled and over age 17 years 6 months
- **Rescreen Past Due**: Includes participants with a screen due in the past
- **Disenrollment Last Month**: Includes participants with an end date in the prior month
- **Disenrollment Run Month**: Includes participants with an end date in the current month
- **Disenrollment Next month**: Includes participants with an end date in the next month

2.4.3 Application of report

Used to find participants who have annual rescreens due based on last screen calculated date from FSIA.

2.6 CLTS Claims Extract V1 and V2

Note: These reports are in the Additional Reports folder within the CLTS folder.

2.6.1 Overview of report

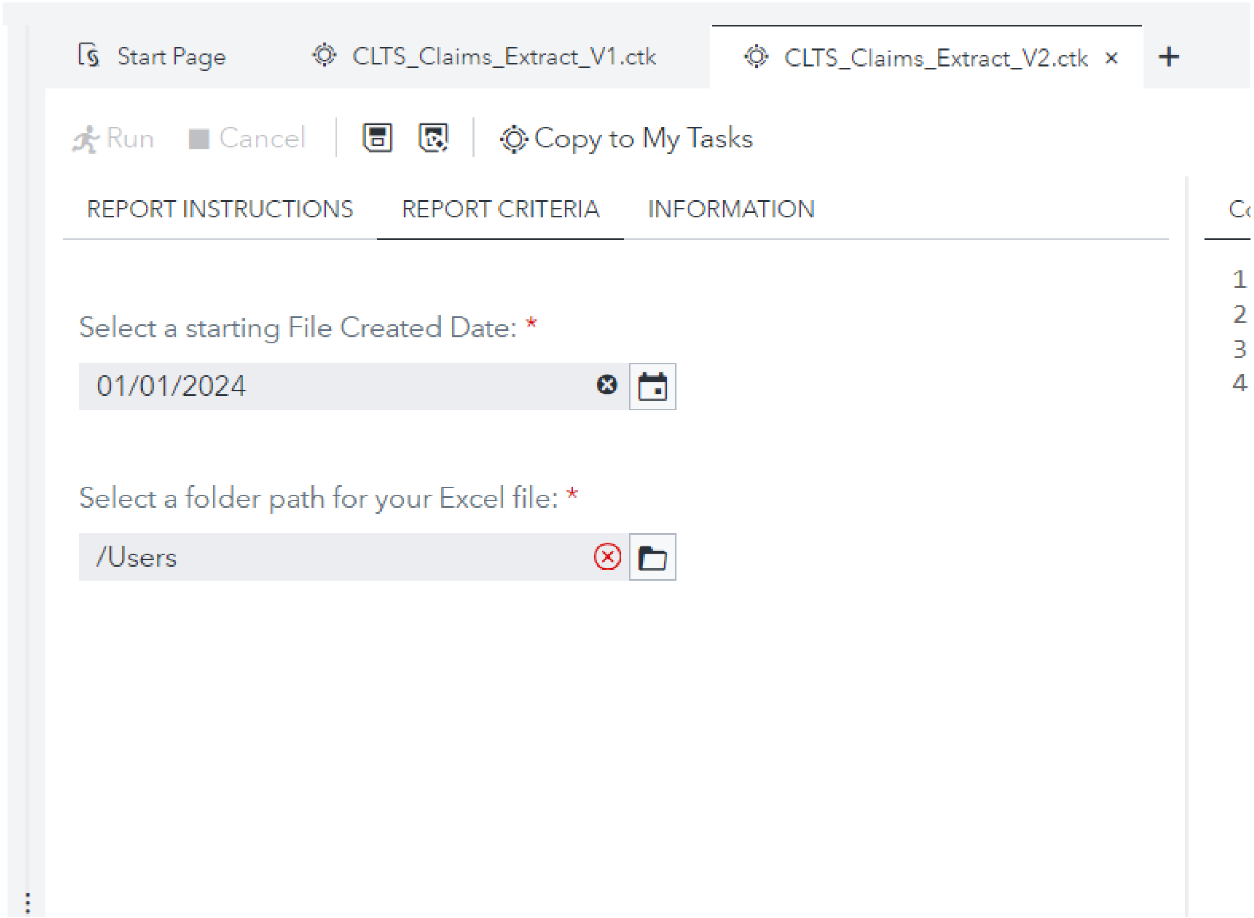
This report is designed to extract the weekly claims data received from Wisconsin Physicians Service (WPS). There are two versions of this report. The V1 (version 1) task is optimal if only needing a few months of File Created Dates. If you get memory errors when running the V1 task, use the V2 task. The V1 Excel file will contain auto filters, but the V2 Excel file will not contain auto filters.

2.6.2 Report tab descriptions

V1 of the report will create a tab for each CWA that the user has access to. V2 will only create one tab with multiple agencies' data combined.

2.6.3 Application of report

This report is designed to allow CWAs to easily extract the full claims data received from WPS. The only input is file create date; the report will extract all records with a file created date from the date entered forward.


Start Page
CLTS_Claims_Extract_V1.ctk
CLTS_Claims_Extract_V2.ctk
Run
Cancel
Copy to My Tasks
REPORT INSTRUCTIONS
REPORT CRITERIA
INFORMATION
Select a starting File Created Date: *
01/01/2024
Select a folder path for your Excel file: *
/Users
1
2
3
4

2.7 CLTS Claims Extract Summary

Note: This report is in the Additional Reports folder within the CLTS folder.

2.7.1 Overview of report

The CLTS Claims Extract Summary report provides a summary of CLTS expenditures of a calendar year. The totals by month are broken down by LTS Code and Funding Source.

2.7.2 Report tab descriptions

This report has one tab that displays the sum of claims paid by month of service.
The example below shows the first half of CY 2024 with dollar amounts removed.

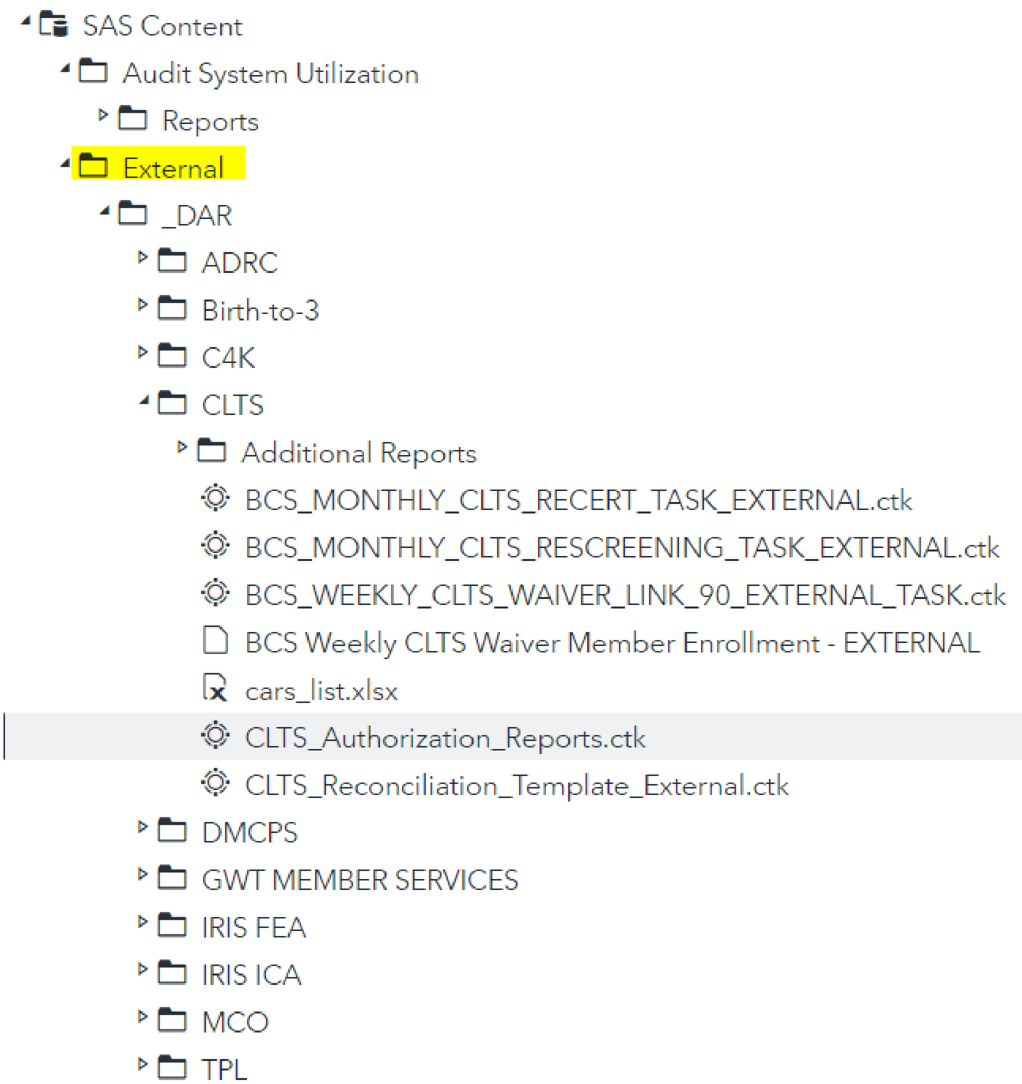
	A	B	C	D	E	F	G	H	I
1			Month of Service						
2	LTS Code Description	Funding Source Code Description	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06	Total
3	Autism DD Intensive	Services							
4	Autism DD Ongoing	Services							
5	Autism PD Ongoing	Services							
6	Autism SED Intensive	Services							
7	Autism SED Ongoing	Services							
8	DD Local	Community Aids match funding							
9		County local tax							
10		Services							
11		Special funding							
12	DD State	Services							
13	PD Local	Community Aids match funding							
14		County local tax							
15		Services							
16		Special funding							
17	PD State	Services							
18	SED Local	COP match funding							
19		Community Aids match funding							
20		County local tax							
21		Services							
22	SED State	Services							
23	missing	Services							
24		Total							

2.7.3 Application of report

This report can be used to get a quick summary of monthly service expenditures broken down by LTS Code and Funding Source.

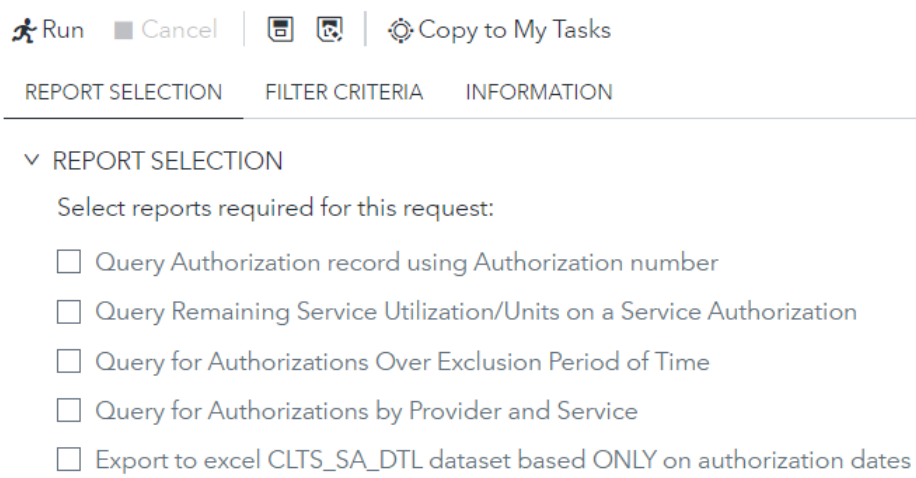
2.8 CLTS Service Auth Reports

2.8 Overview of report



2.8.1 Report selection

The first tab when you open the CLTS_Authorization_Report.ctk will be titled "REPORT SELECTION." It will contain different checkable boxes which determine what results the report will return:



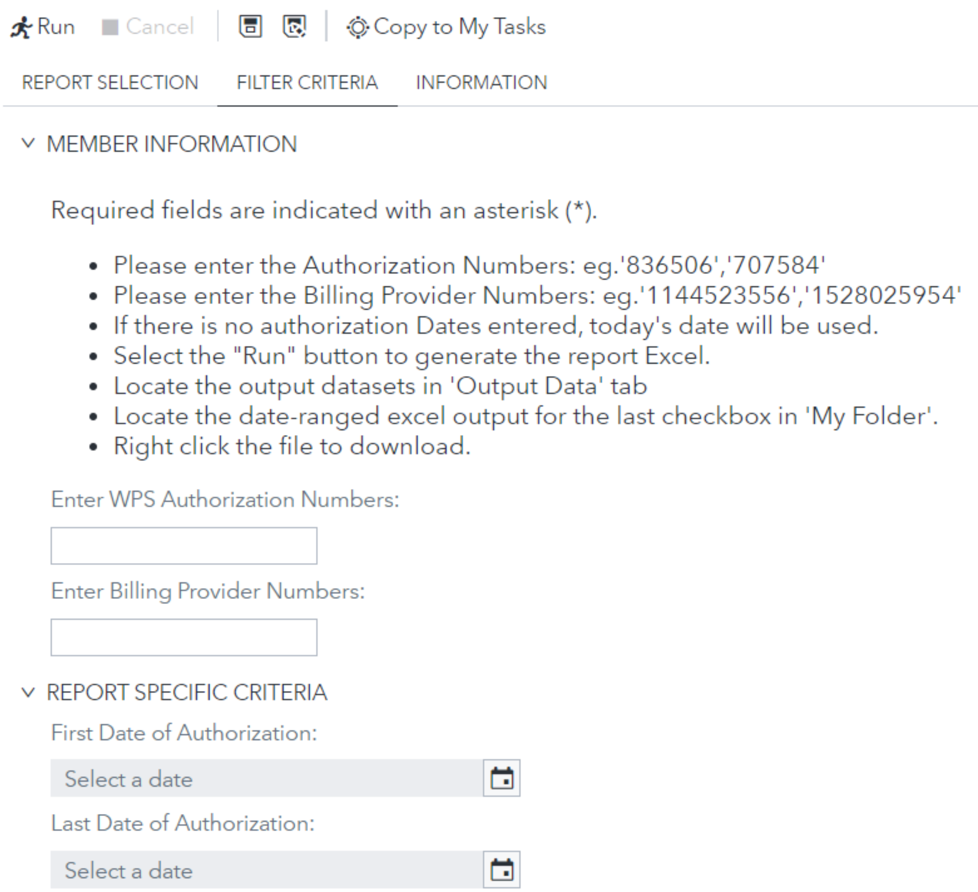
You can select anywhere from one of these report types to all of them but pay attention to their labels (for instance the last report titled "Export to excel CLTS_SA_STL dataset based ONLY on authorization dates" will ignore other filter criteria you may have selected. If you're opting to go by Authorization number, you will likely not want to select the last box).

2.8.2 Filter criteria

The Second tab you'll encounter is titled "Filter Criteria" and has 3 options to filter by:

1. WPS Authorization Numbers
2. Billing Provider ID Numbers
3. Authorization Start and End Dates

The Filter Criteria tab contains instructions on properly entering filtering elements into these fields:



2.8.3 Information

The final tab you will see when opening the CLTS_Authorization_Reports.ctk file is titled "Information" and contains information about the report, including a name and description of the report as well as a version number.

2.8.4 Application of report

This report provides combinations of the following data elements relating to CLTS Service Authorizations, based on the report selection you choose from the list of options below:

REPORT SELECTION

Select reports required for this request:

- ☐ Query Authorization record using Authorization number
- ☐ Query Remaining Service Utilization/Units on a Service Authorization
- ☐ Query for Authorizations Over Exclusion Period of Time
- ☐ Query for Authorizations by Provider and Service
- ☐ Export to excel CLTS_SA_DTL dataset based ONLY on authorization dates

Data Elements Available in Report:

- Waiver Program
- Waiver Agency Organizational ID
- Waiver Agency Authorization Number
- Waiver Agency Internal Authorization Number
- Member ID
- County Authorization is Serviced In
- Billing Provider ID
- Billing Provider ID Qualifier
- Authorization Frequency- Payment Method
- Fee Schedule Rate Amount
- Authorized Rate Amount
- Fee Schedule Percent of Billed
- Fee Schedule Percent of Billed Cap Amount
- Authorization Start Date
- Authorization End Date
- Amount Used
- Amount Remaining
- Procedure Code
- Revenue Code
- Modifier (1-4 potential modifiers)
- Units Approved
- Units Used
- Units Remaining
- Revision Indicator
- Record Added Date
- Record Last Updated Date
- Authorization Sequence Number
- Last Authorization Indicator

Selecting the report type labeled “**Query Authorization Record Using Authorization Number**” from the list shown at the beginning of this section will return Authorization Number, Authorization Start and End Date, Rate Amount, Remaining Amount, MCI Number, Rate Type Code, Authorization Number, and Last Authorization Indicator.

Selecting the report type labeled “**Query Remaining Service Utilization/Units on a Service Authorization**” will return Authorization Number, Units Remaining, Units Approved, Authorization Sequence Number, and Last Authorization Indicator.

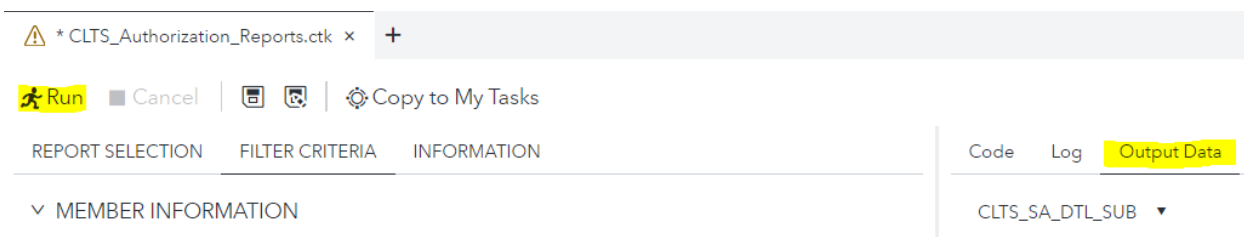
Selecting the report type labeled “**Query for Authorizations Over Exclusion Period of Time**” will return Authorization Number, Authorization Start and End Date, Exclusion Period Start and End Date, Authorization Sequence Number, and Last Authorization Indicator.

Selecting the report type labeled “**Query for Authorizations by Provider and Service**” will return Waiver agency Authorization Number, Provider Billing National ID, Rendering Provider National ID, Procedure or Revenue Code, and Modifier Codes (1-4).

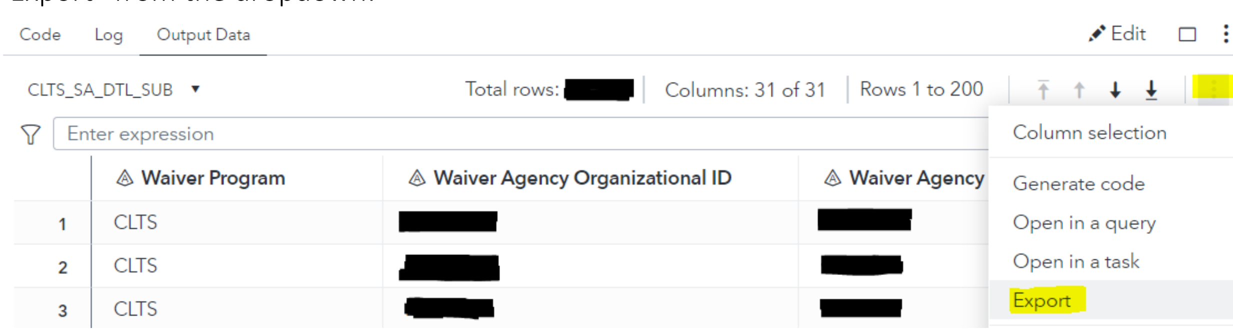
Lastly, selecting the final report type labeled “**Export to excel CLTS_SA_DTL dataset based ONLY on authorization dates**” will return every authorization related to your waiver agency within the dates you input, and will return **all** data elements named above.

2.8.5 Exporting results

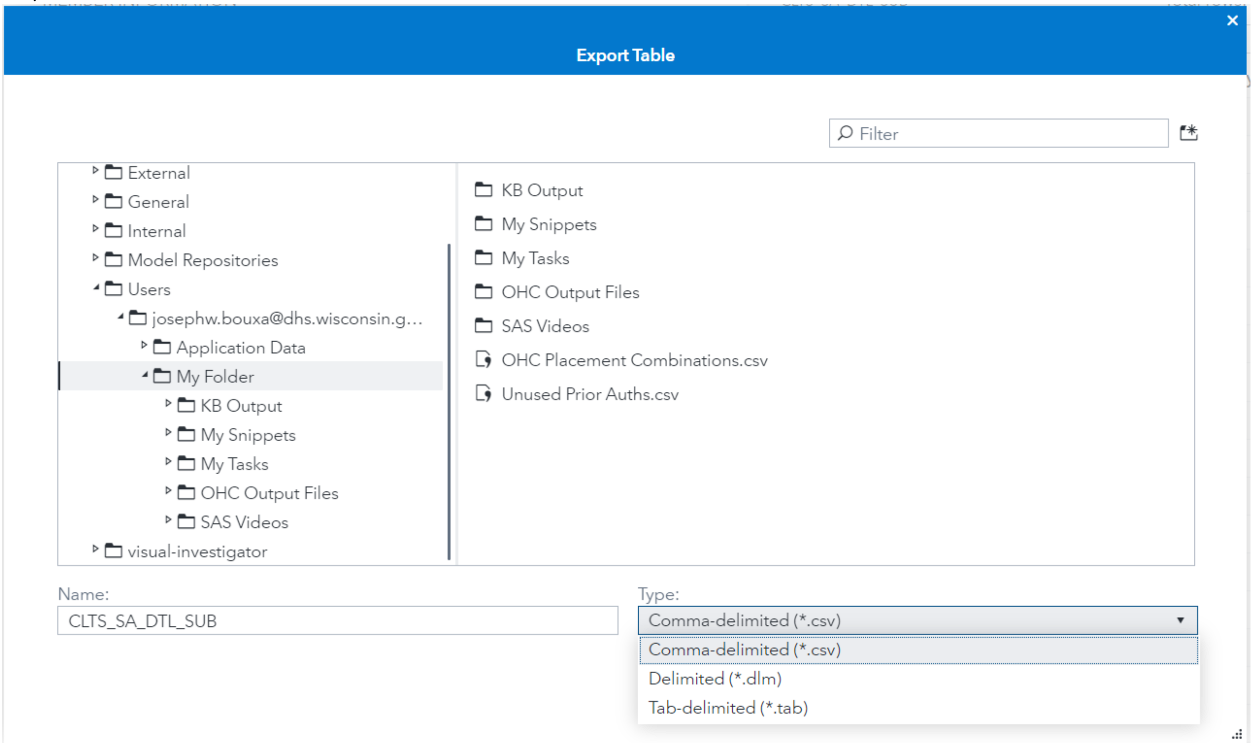
Once you’ve selected your report type and filter criteria and hit “Run” as shown below, you can navigate to the “Output Data” tab (also highlighted below) to view your results:



From here, you can navigate to the ellipses on the righthand side of the Output tab and select “Export” from the dropdown:



This will bring up a screen to select where in your SAS Directory the file will export as well as the export format:



Once you've selected a location, file format and exported, the file, you can simply download it and open it in excel.

CLTS Advanced Query Builder (AQB)

3.1 Overview of AQB

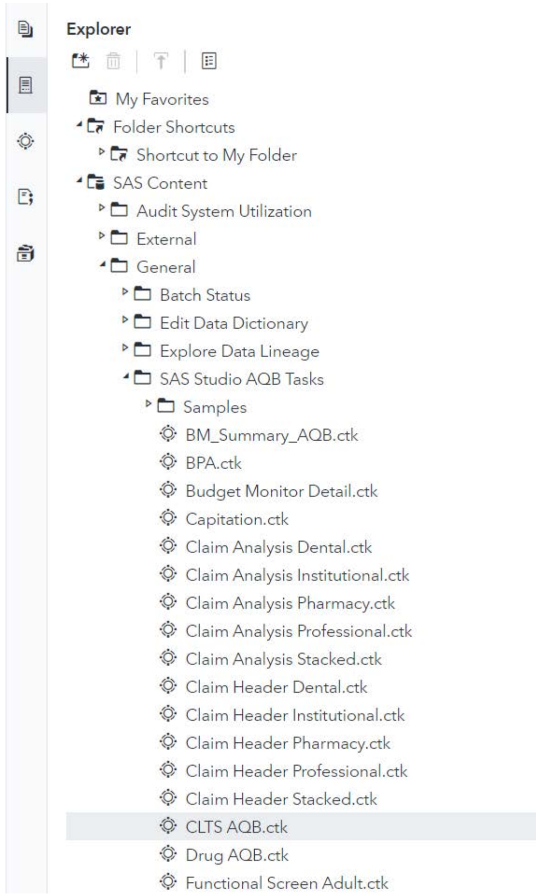
An AQB is a graphical user interface to query tables related to a specific data area. The AQB is available within SAS Studio as a point-and-click task. An AQB allows users to easily build a query by selecting the data elements they want to return and applying predefined filters.

This section will highlight functionality specific to the CLTS AQB. For general information on how to use AQBs please refer to the job aid "Using Advanced Query Builders" located on the SAS Virtual Learning Environment (VLE) under the Help -> Advanced Query Builder tab.

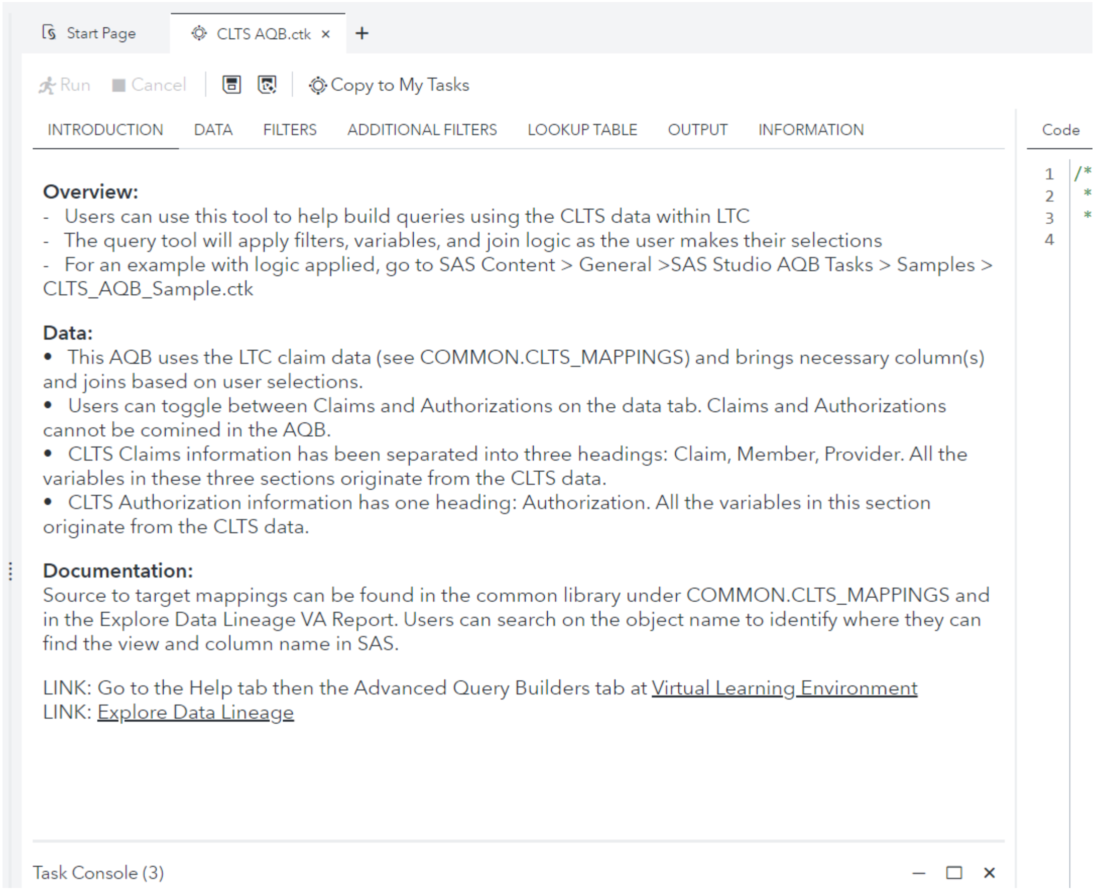
The CLTS AQB can be used to query the claims or authorization data received from WPS.

3.1.1 Introduction

1. To open the CLTS AQB, navigate to the SAS Studio/SAS Content/General/SAS Studio AQB Tasks folder and double click CLTS AQB.ctk

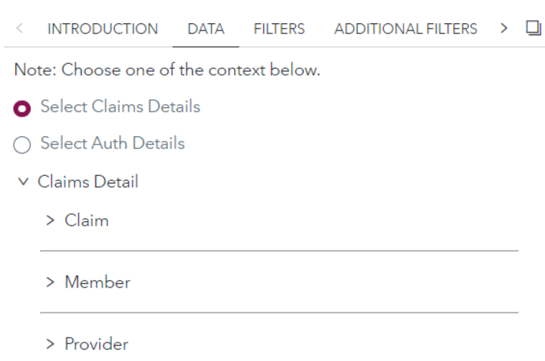


2. The introduction tab gives an overview of the AQB, important information for using the AQB, and links to documentation.

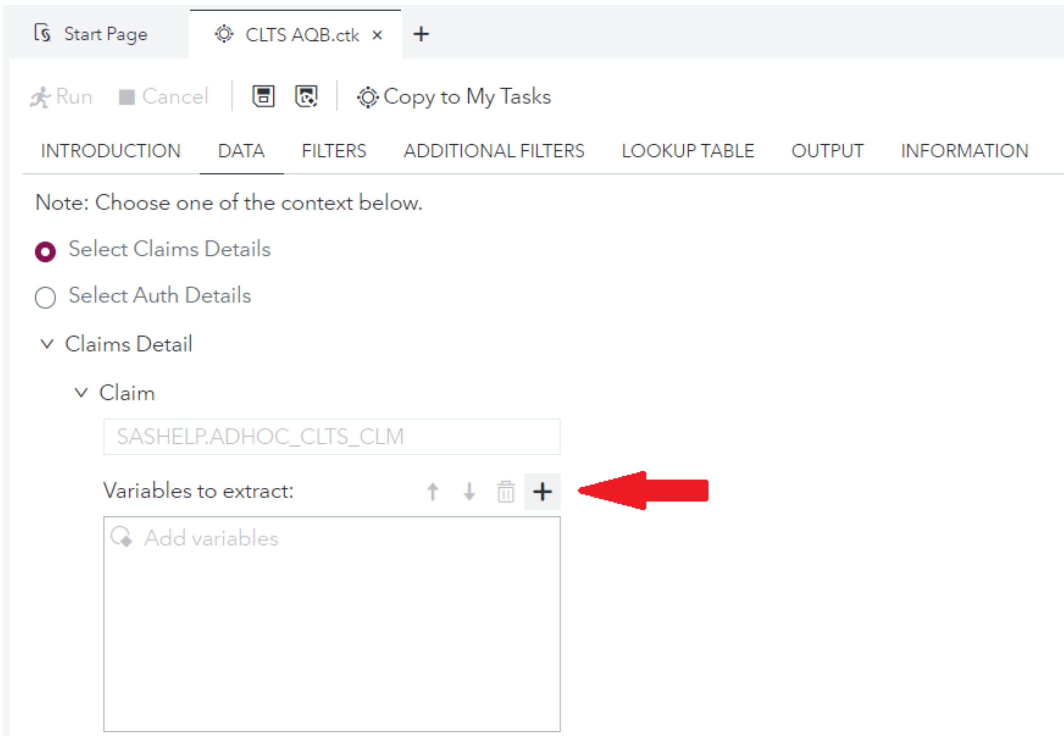


3.1.2 Data

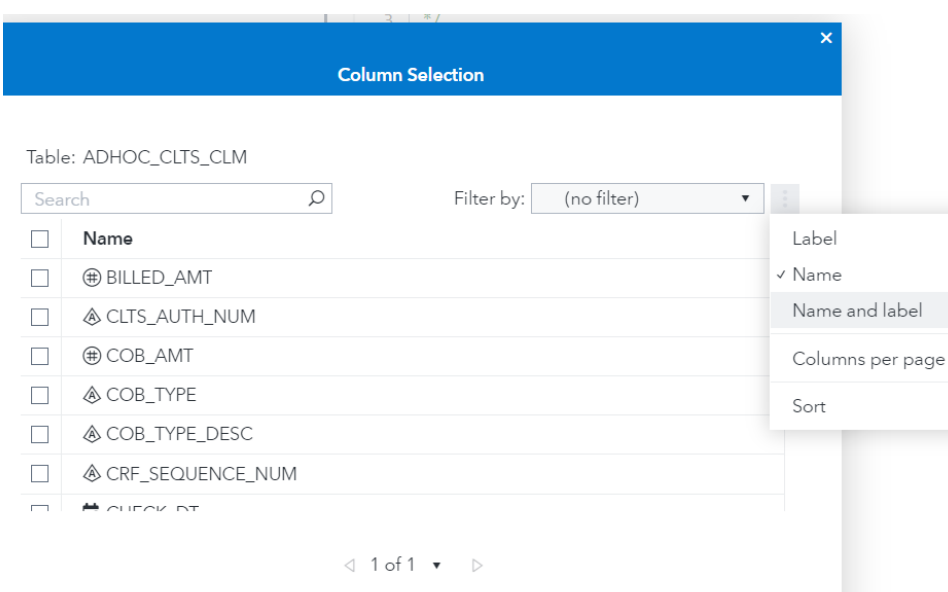
- The first step to using the AQB is to select the fields to return on the data tab.
- Selecting Claims Details will return Claims data and selecting Auth Details will return Authorization data. Claims and auth data cannot be combined.
  - Both claims and authorization data are broken into three classes: Claim, Member, and Provider:



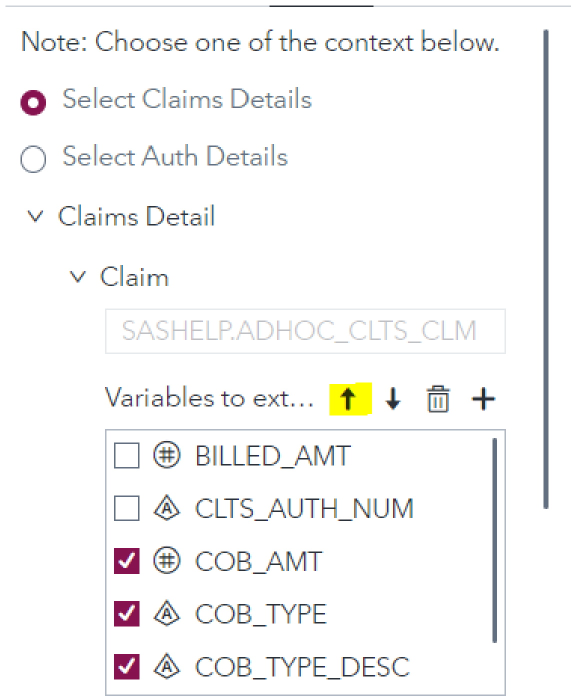
- To select the data elements you want, click the plus sign for “Variables to extract”



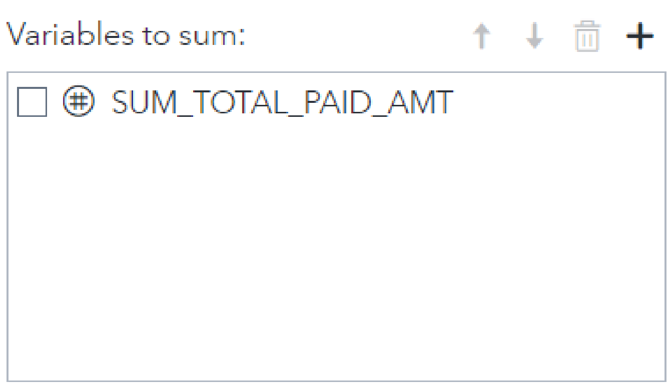
- Select the data elements that you want as columns on the output.
  Note: You can add the field label by clicking the 3 dots menu on the right side of the pop-up. This will display the common name of the field which could make it easier to find what you want.



- You can order data elements to output in the order you prefer. To do so, select data elements by checking the box to the left of them and use the up-facing and down-facing arrows to move selected objects up or down in list.

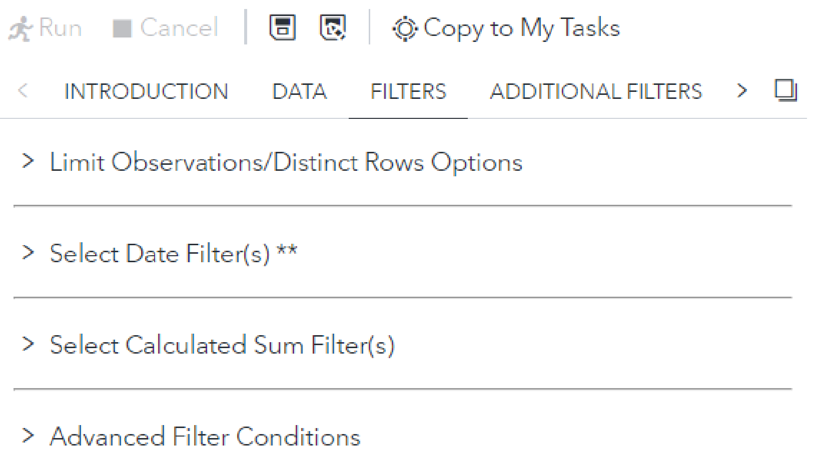


- **Tip:** If you're querying Sum Total Paid Amount (SUM_TOTAL_PAID_AMT) to determine the final paid total on a claim record, it's often better to add the element under the "Variables to Sum" selection box instead of the "Variables to Extract" selection box, especially when querying data specific to a service or provider without member info included:

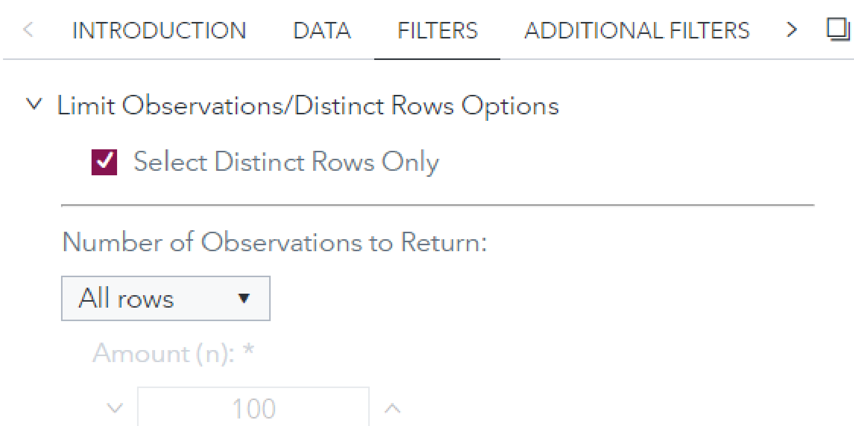


3.1.3 Filters

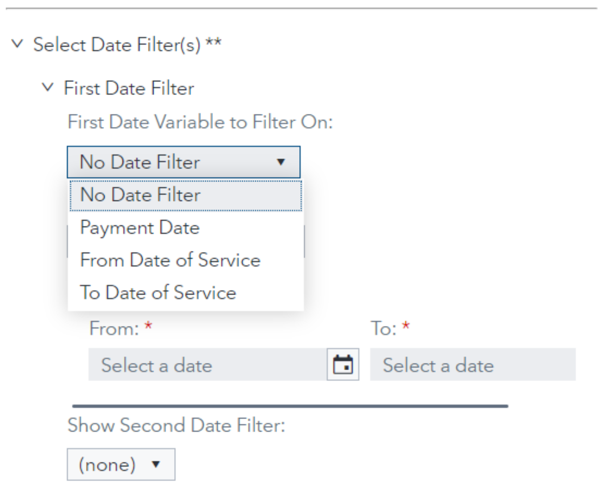
- You'll need to select at least one date filter to query data out of the CLTS Claims/Authorizations AQB.



- You should select "Select Distinct Rows only" under the first headed section as shown below:

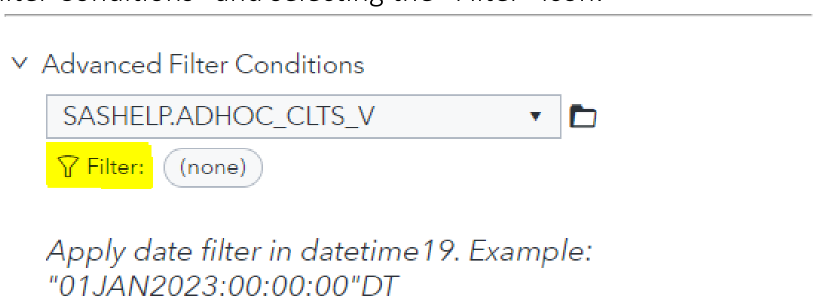


- The next tab allows you to select a date filter.

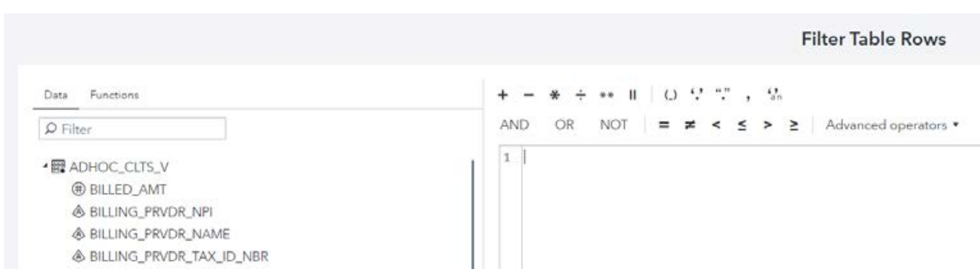


Here you can select either payment date, from date of service, to date of service, or a combination of any two of those date variables

- You can also add a custom filter to your query by selecting the filter button under “Advanced Filter Conditions” and selecting the “Filter” icon:

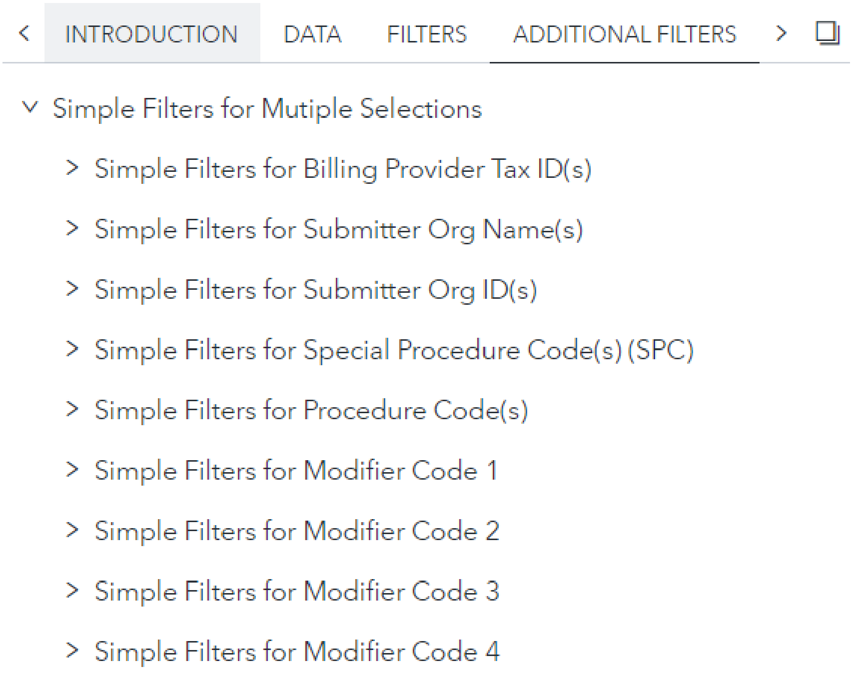


- From here you can freehand filters in using the provided SQL prompts as shown below:



3.1.4 Additional filters

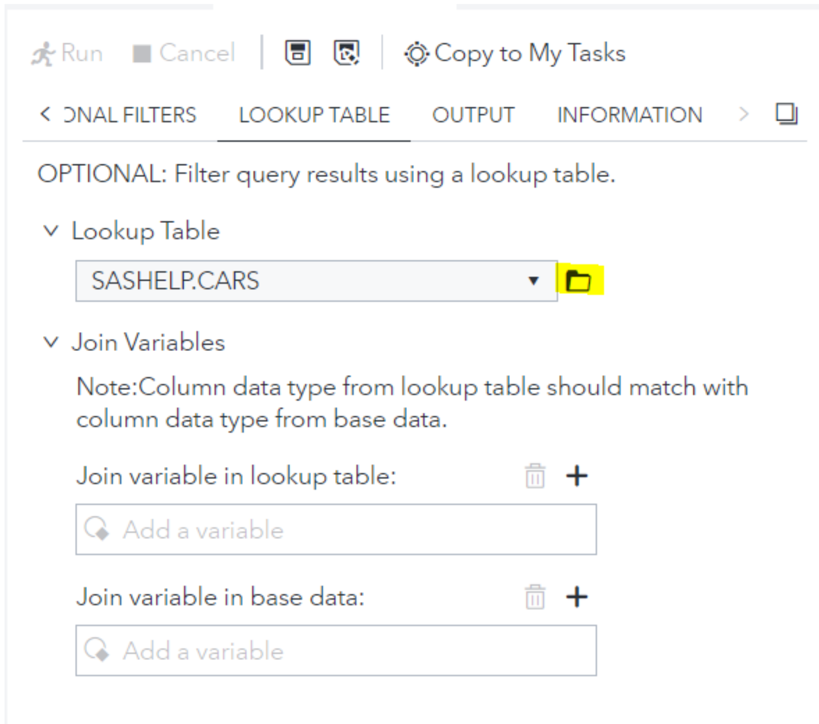
- In addition to the filters described above, there are additional simple filters available under the tab titled “Additional Filters” which allow you to search by the criteria listed below:



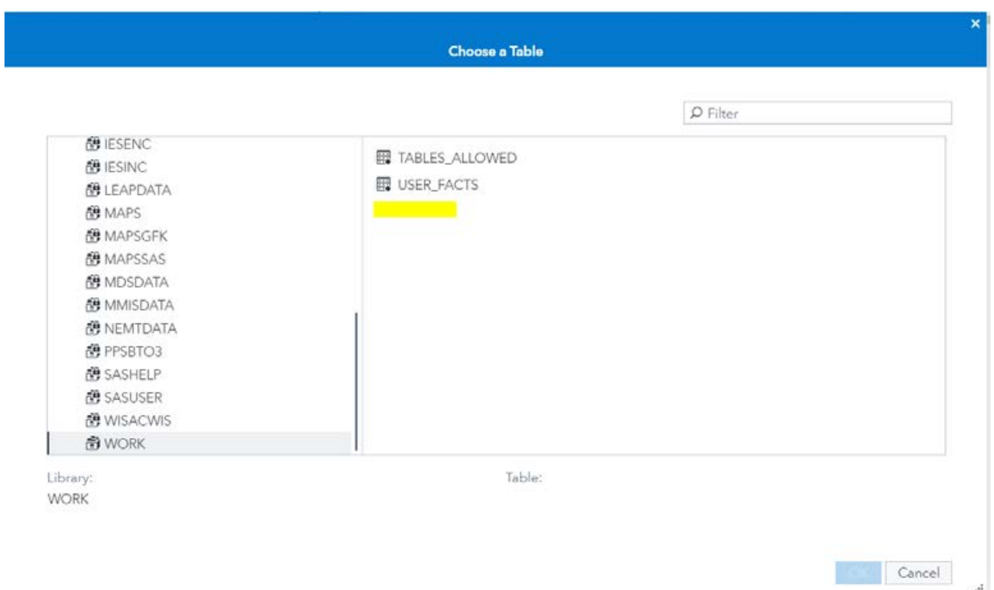
3.1.5 Lookup table

- One of the more advanced tools lives on the tab to the right of “Additional Filters” titled “Lookup Table.” This function allows users to upload a table of records to match to
  - For instance, you could upload a list of Medicaid IDs and,by joining to that data element, return only results for participants matching that list of IDs

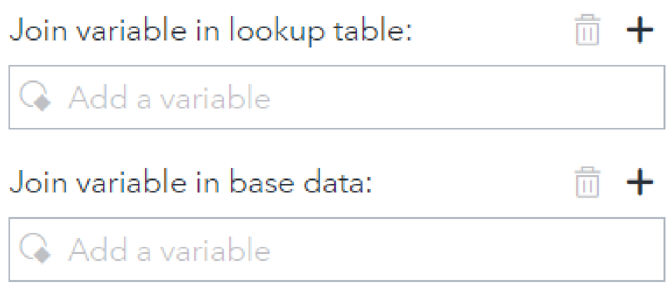
- To use this function, you'll need to select a table from your work library which has the criteria you wish to query against by selecting the highlighted folder icon:

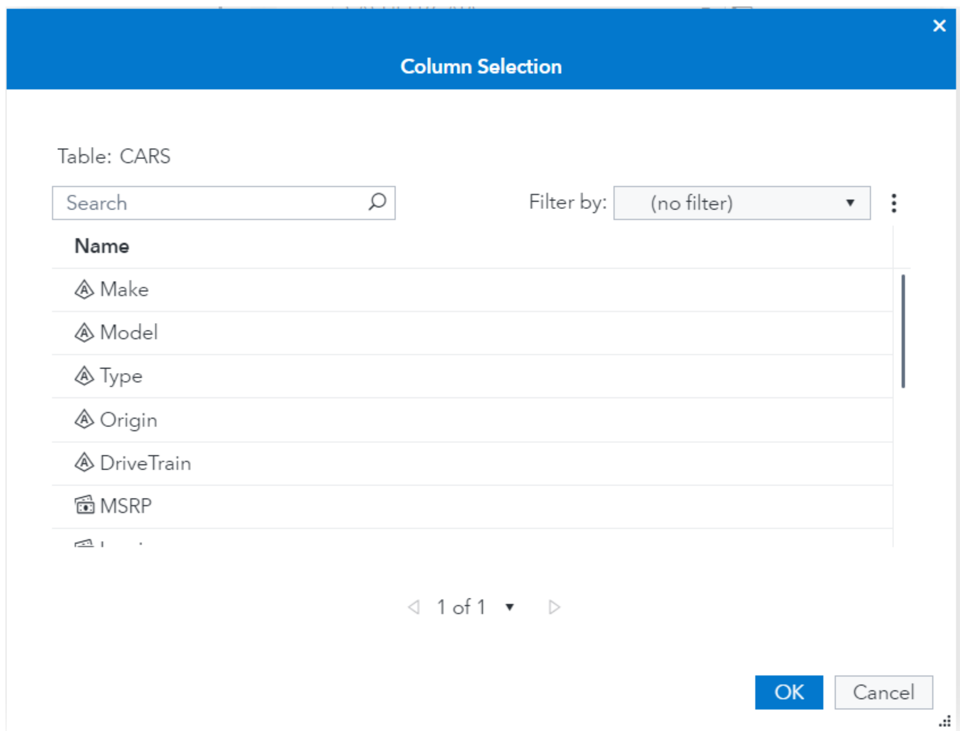


  - You'll then need to select the table that you'd like to open:



Lastly, you'll need to select a join variable in the lookup table, as well as a join variable in the SAS data. This join variable is what the AQB is matching records on.



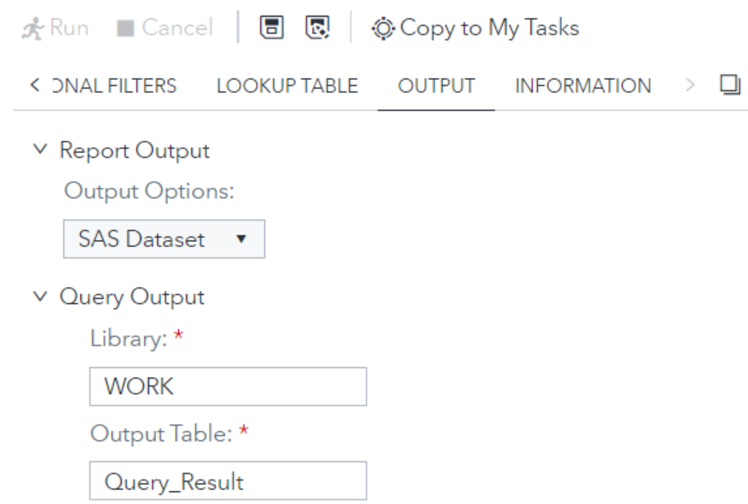


- In the example shown you can see the various example elements you're able to select from. Typically this value should be a unique ID, such as an SSN or an MCI

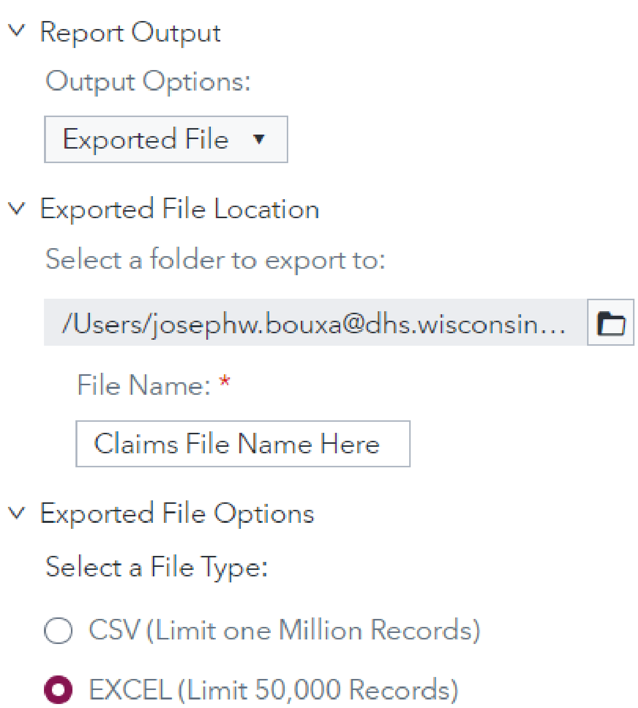
3.1.6 Output

The final step of using the CLTS AQB to query claims and authorizations data is to select an output format and location.

You will find the output tab far right on the list of tabs as shown below:



If you wish to export your query output as an Excel file, you'll need to select "Exported File" as well as a location in your personal folder system in SAS to export it to.



- As shown here you can also select either CSV or XLSX as a file type, as well as assign an output name to your query results