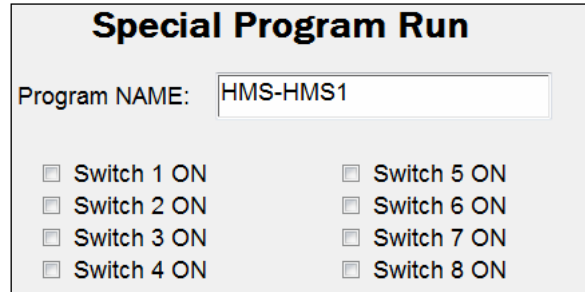


How to Create Files for the HMS Audit

Verify that you have installed **Release 9.08** (or later) and downloaded **Patches** from the Hi-Tech website.

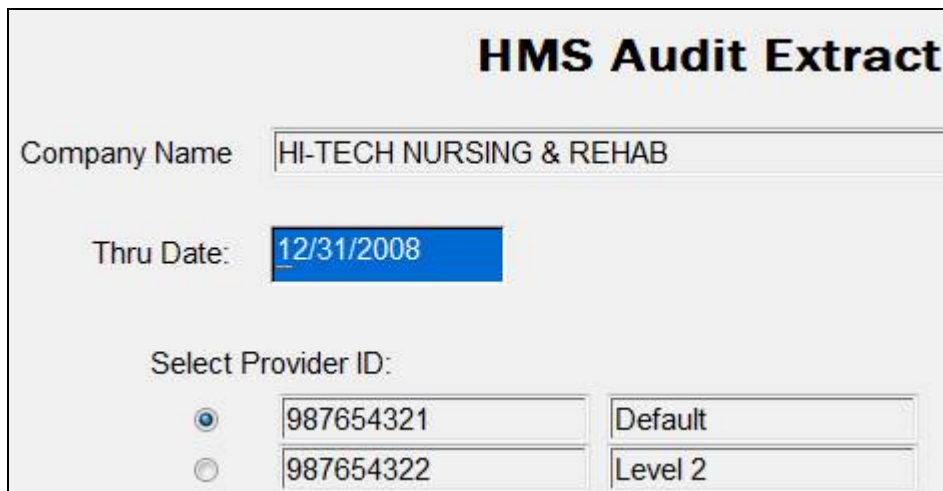
1. On any Hi-Tech menu press the [F9] key on your keyboard.
2. At **CAUTION: This function will allow you to do a Special Program Run!** click **OK**.
3. At Enter Password, type MENU (UPPER case) and click **OK**.

4. On the **Special Program Run** screen, at Program NAME, type **HMS-HMS1**. Click **OK**.



5. On the **HMS Audit Extract** (below) enter the **Thru Date*** and select the **Provider ID** for which you want to build audit files. (Some facilities will have only one Provider ID listed.) Click **OK**.

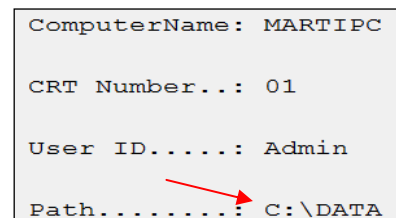
* Find the correct **Thru Date** in the letter from HMS that defines the materials required for the audit. Item 1 in that letter provides the census period.



6. The program will cycle through the detail and create files for all residents with MaineCare detail for the audit period defined by HMS.

Note: As these files are created, several Hi-Tech programs will run in the background. If you accidentally display any of these program screens, *please ignore them*. They will disappear when the process is finished.

7. When created, the HMS files will be saved to the HTS Path in the HMS-AUDIT folder. To learn the HTS Path name, on an HTS menu, press the [F1] key on your keyboard. See the sample screen on the right.



```
ComputerName: MARTIPC
CRT Number...: 01
User ID.....: Admin
Path.....: C:\DATA
```

8. The created files will be named with the Provider ID and the type of detail.
Examples: (X:\DATA represents the HTS path name):

- a. X:\DATA\HMS-AUDIT\123456789AGE.HMS (Aging)
- b. X:\DATA\HMS-AUDIT\123456789DTL01.HMS (*AR detail)
- c. X:\DATA\HMS-AUDIT\123456789CEN.HMS (Census detail)

* Note the **01** after the letters DTL in the AR detail file name.
The process might create multiple AR detail files of up to 50,000 records each.
The files will be numbered 01, 02, 03, etc.

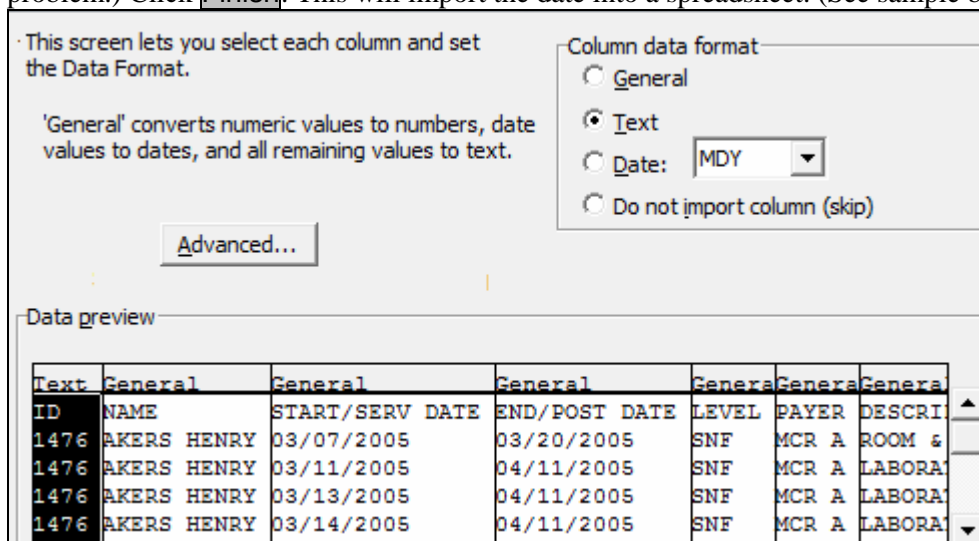
9. Open Microsoft Excel and browse for the files.

At **Files of Type**, choose All Files. Choose the file (see above sample names).

10. If Excel displays: "Excel has detected that 123456789AGE.HMS is a SYLK file..."
click **OK** to continue.

11. When the Excel **Import Wizard** opens, do the following:

- Step 1 of 3: Choose **Delimited** and then click **Next>**.
- Step 2 of 3: Choose **Comma** to insert columns correctly. Click **Next>**.
- Step 3 of 3: With the first column highlighted, choose **Text**.
(If you do not do this step the Resident IDs may lose leading zeroes, otherwise this is not a problem.) Click **Finish**. This will import the data into a spreadsheet. (See sample below.)



12. When you finish reviewing the spreadsheet, click **File > Save As** and save the file to a location and with a name of your choice.

IMPORTANT: Change "Save as type" to Excel or Microsoft Excel Workbook.

Example: **Save as type:** Microsoft Excel Workbook

13. Submit the files to HMS as they have recommended.

HMS uses **Voltage** for transmitting patient data.

Please ask HMS for help in submitting files.