



GEORGIA DEPARTMENT OF  
COMMUNITY HEALTH



# ***ViewDirect***

***Georgia Technology Authority***  
***ELECTRONIC BILLING PROCESSING***  
***(E - BILL)***

**QUICK REFERENCE GUIDE**

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## PROPRIETARY STATEMENT

The Georgia Technology Authority (GTA) Electronic Reporting System (E-Bill or ViewDirect) is owned by the State of Georgia and operated by the State Health Benefit Plan Division of Information Technology and the Georgia Technology Authority. Unauthorized access is prohibited by the Georgia Computer Systems Protection Act (O.C.G.A. 16-9-90, et seq.), as well as all applicable FEDERAL laws.

The Telecom, DataNet, and Miscellaneous Computer Services Billing information is available on-line via the internet. This process is called Electronic Billing Process (E-Billing) or State Health Benefit Plan (SHBP) ViewDirect; and is accessible according to the information provided by the employing entity.

All information contained in this document is confidential proprietary information of the State of Georgia, the Department of Community Health, and SHBP and must not be shared with unauthorized users.

**ViewDirect: TECHNICAL REQUIREMENTS / ACCESS AGREEMENT /  
USER I.D. AND PASSWORD**

**Technical Requirements:**

Assistance from your IT staff may be necessary in order for you to access this site and utilize all features. Your IT staff should verify the following:

- Pop-up blockers are turned off
- Port 8443 is open
- Java is installed and enabled on your computer
- Security settings are correct to allow downloads from this site

**SHBP ViewDirect Access Agreement:**

Authorized employing entities may access various reports electronically for viewing, downloading, and/or printing from the SHBP ViewDirect System by completing a **SHBP ViewDirect Access Agreement**. This agreement gives access to the secure site where ViewDirect Reports are housed; and grants access to only that specific employing entity as stated in the SHBP ViewDirect Access Agreement.

SHBP ViewDirect Access Agreement(s) are available for printing at the DCH website, [www.dch.georgia.gov/shbp](http://www.dch.georgia.gov/shbp) or by calling the SHBP Payroll Location/Employer Services Unit at 1-800-776-9045. Complete SHBP ViewDirect Access Agreement(s) should be faxed to the attention of Deborah Sheppard at 1-866-545-3161.

**SHBP ViewDirect User I.D.'s and ViewDirect Passwords:**

Once the SHBP ViewDirect Access Agreement has been received and verified by SHBP, ViewDirect User I.D.'s and ViewDirect Passwords are assigned according to the agreement. The SHBP ViewDirect System Administrator is responsible for the following:

- the assignment of ViewDirect User I.D.'s (Identifications)
- the assignment of ViewDirect Passwords
- the resetting of ViewDirect Passwords

All SHBP ViewDirect System Administrator requests should be made via e-mail to Deborah Sheppard at [dsheppard@dch.ga.gov](mailto:dsheppard@dch.ga.gov).

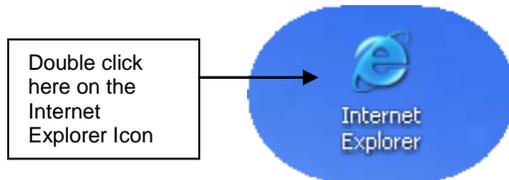
Each employing entity may be assigned up to three ViewDirect User I.D.'s and ViewDirect Passwords; and are assigned to specific individuals within the employing entity's location. Each individual must sign an agreement that they will not allow anyone access to their ViewDirect User I.D.'s and ViewDirect Password. The employing entity's location manager will also sign an agreement to immediately advise Deborah Sheppard via email at [dsheppard@dch.ga.gov](mailto:dsheppard@dch.ga.gov) to terminate ViewDirect User I.D.'s and ViewDirect Passwords when assigned users are no longer eligible to access the ViewDirect secure site.

To access an electronic version of the ViewDirect Quick Reference Guide, please visit the DCH website at [www.dch.georgia.gov/shbp](http://www.dch.georgia.gov/shbp).

## ViewDirect LOG ON

Follow the below directions to log onto ViewDirect:

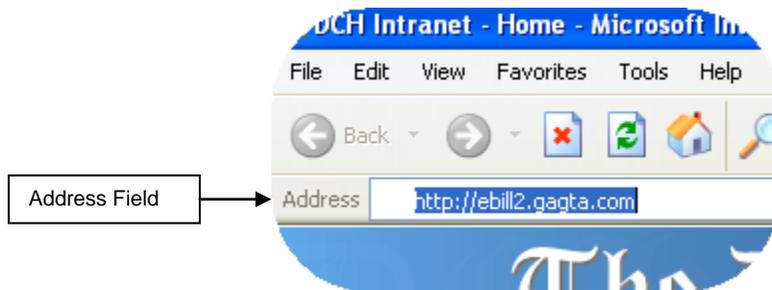
- **Double click** the **Internet Explorer Icon** on your desktop (*Figure 1*)



*Figure 1 - Desktop Internet Explorer Icon*

The Internet Browser Home screen will display.

- **Enter** <http://ebill2.gagta.com> in the **address field** of the Internet Browser screen (*Figure 2*)
- **Press** the **Enter** key



*Figure 2 - Internet Browser Address Field*

**Note:**  
**The site address does not use www.**

The Georgia Technology Authority (GTA) Electronic Reporting System (E-Bill) / **ViewDirect Log On Screen** will display (Figure 3).



Figure 3 - ViewDirect Log On Screen

- Enter your **ViewDirect User ID** in the SSG Info User I.D. field (Figure 4)
- Press the **Tab** key to move the cursor to the Password field
- Enter your **initial ViewDirect Password** in the Password field (Figure 4)

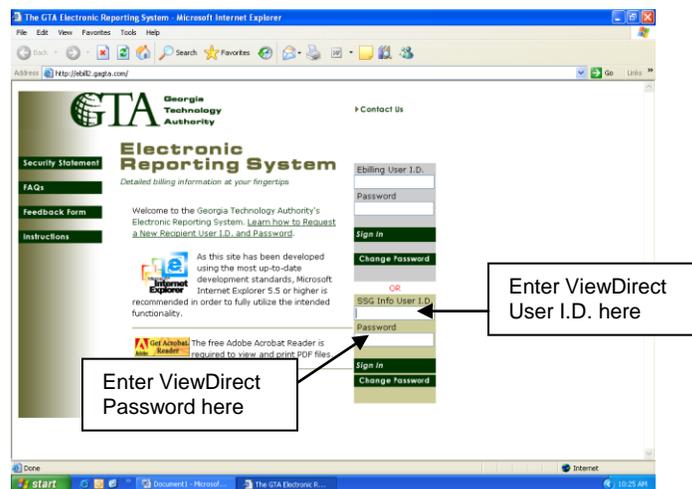


Figure 4 - ViewDirect Log On Screen

**Note:**

The State Health Benefit Plan (SHBP) ViewDirect System Administrator is responsible for the following:

- the assignment of ViewDirect User I.D.'s (Identifications)
- the assignment of ViewDirect Passwords
- the resetting of ViewDirect Passwords

All SHBP ViewDirect System Administrator request should be made via e-mail to Deborah Sheppard at [dsheppard@dch.ga.gov](mailto:dsheppard@dch.ga.gov).

You will not be prompted to change your initial ViewDirect Password, but it must be changed within 30 days of issue. To change your ViewDirect Password, follow the instructions in the ViewDirect Password Change section on page 9.

- Press the **Tab** key to move the cursor to the Sign In field (Figure 5)
- Press the **Enter** key



Figure 5 - ViewDirect Log On Screen

**Note:**

When using the **Tab** key to move your cursor to the **Sign In** field (Figure 5), the cursor will not be displayed in that field prior to pressing the **Enter** key. You may also click inside the **Sign In** field to complete this step.

A **Security Alert** pop up box will display (Figure 6). Stating, “You are about to view pages over a secure connection. Any information you exchange with this site cannot be viewed by anyone else on the Web” (Figure 6).

- Click the **OK** push button (Figure 6) to acknowledge the Security Alert (If you would like to see additional information regarding the Security Alert, click the **More Info** push button. If you do not wish to receive this Security Alert in the future, click inside the check box in front of the “do not show this warning” statement.)



Figure 6 - Security Alert Pop Up Box

The DocumentDirect for the Internet screen will display (Figure 7). From this screen you may view reports, print reports, download reports, and download files.

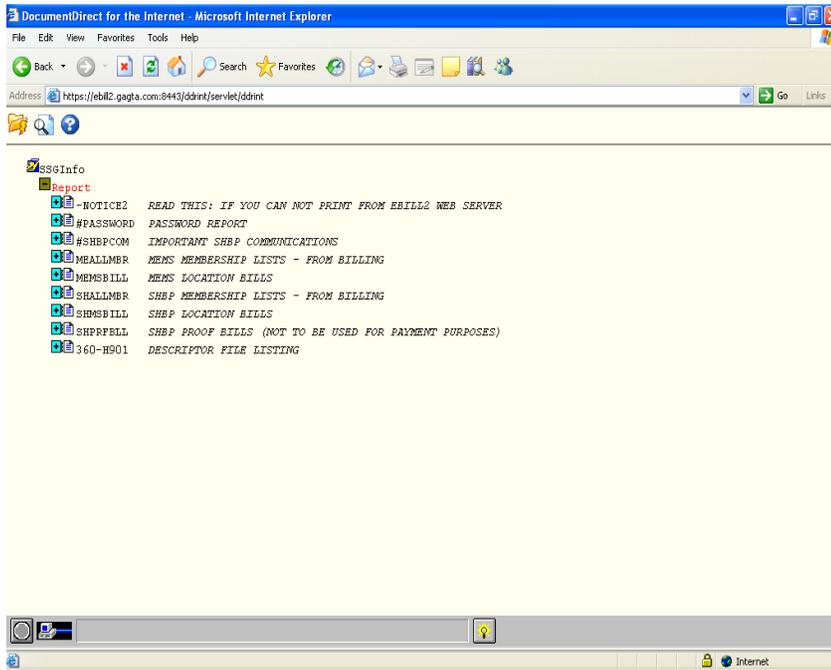


Figure 7 - DocumentDirect for the Internet Screen

## ViewDirect PASSWORD CHANGE

The initial ViewDirect Password, assigned by the System Administrator, must be changed to a new password within 30 days of issue. ViewDirect Password changes may be made at anytime. To prevent password expiration please place a reminder on your calendar every 30 days to change your password (a scrolling message will appear on the log on screen advising the required password change is due).

**Follow the below directions to change your ViewDirect password:**

Access the **ViewDirect (GTA E-Bill) Log On Screen** (Figure 8).



Figure 8 - ViewDirect Log On Screen

- Enter your **ViewDirect User ID** in the SSG Info User I.D. field (Figure 9)
- Press the **Tab** key to move the cursor to the Password field
- Enter your **ViewDirect Password** in the Password field (Figure 9)

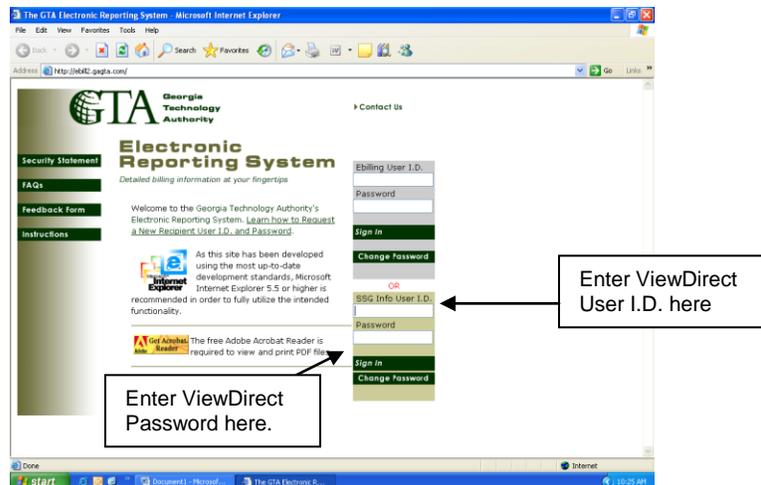


Figure 9 - ViewDirect Log On Screen

- Press the **Tab** key **twice** to move the cursor to the Change Password field (Figure 10)
- Press the **Enter** key

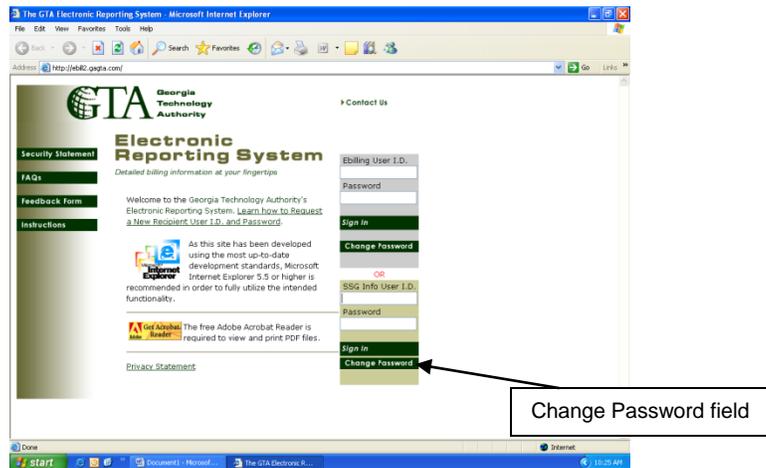


Figure 10 - ViewDirect Log On Screen

**Note:**  
 When using the **Tab** key to move your cursor to the **Change Password** field (Figure 10), the cursor will not display in that field prior to pressing the **Enter** key. You may also click inside the **Change Password** field to complete this step.

The GTA Electronic Reporting System Password Maintenance screen will display (Figure 11).

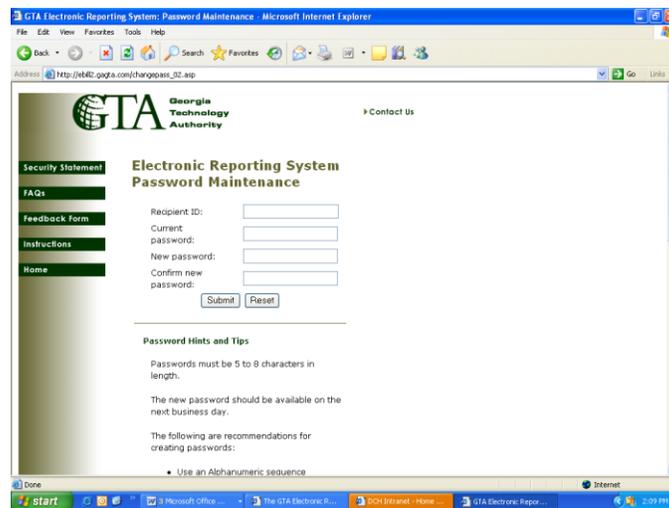


Figure 11 - GTA Electronic Reporting System Password Maintenance Screen

- Enter your **ViewDirect User ID** in the Recipient I.D. field (Figure 12)
- Press the **Tab** key to move the cursor to the Current Password field (Figure 12)
- Enter your **Current ViewDirect Password** (Figure 12)
- Press the **Tab** key to move the cursor to the New Password field (Figure 12)

### Electronic Reporting System Password Maintenance

Recipient ID:

Current password:

New password:

Confirm new password:

Enter ViewDirect ID in the Recipient ID field here

Enter the Current ViewDirect Password in the Current Password field here

New Password field

Figure 12 - GTA Electronic Reporting System Password Maintenance Screen

- Enter your **New ViewDirect Password** (Figure 12a)
- Press the **Tab** key to move the cursor to the Confirm New Password field (Figure 12a)
- Enter your **New ViewDirect Password again to confirm the new password** (Figure 12a)
- Press the **Tab** key to move the cursor to the **Submit** push button (Figure 12a)
- Press the **Enter** key (Figure 12a)

### Electronic Reporting System Password Maintenance

Recipient ID:

Current password:

New password:

Confirm new password:

Enter your New ViewDirect Password in the New Password field here

Re-enter your New ViewDirect Password in the Confirm New Password field here

Submit Push Button

Figure 12a - GTA Electronic Reporting System Password Maintenance Screen

A password change request confirmation will display (Figure 13). The message states:

**“Your Password change request has been submitted. Your new password will not be effective until the next business day.”**



Figure 13 - Password Request Change Confirmation

- Click the Home field (Figure 13a)



Figure 13a - Password Request Change Confirmation

The ViewDirect Log On Screen will re-display (Figure 14).



Figure 14 - ViewDirect Log On Screen

**Your new ViewDirect password will be effective the next business day.** The system will execute a batch job that will process nightly to complete the process of all requested password changes. **Your old ViewDirect password should be used on the date of the password change.** Please refer to page 5 for ViewDirect User ID and ViewDirect Password entry instructions - *Figures 3 and 4.*

Please contact your System Administrator at SHBP for ViewDirect password change issues or to reset your ViewDirect password.

## SELECTING AND VIEWING CURRENT REPORTS

Once the log on process for ViewDirect has been successfully completed, the DocumentDirect for the Internet screen (DocumentDirect Screen) will automatically display (Figure 15). The screen will list reports available on ViewDirect including a brief description of each. The frequency at which the reports are generated may be found on pages 44 thru 46 of this document.

For the purpose of this quick reference guide, we will focus on two reports:

1. **SHMSBILL** - this report displays a payroll location's billing for a specific period
2. **SHALLMBR** - this report displays a payroll location's membership listing for a specific billing period

However, the exact steps are utilized when selecting and viewing other reports posted to ViewDirect.

The most current/recent report may be quickly accessed by clicking on the blue notepad icon next to the report name. Additional reports (other than current reports) may be collapsed on the reports list (Figure 15). To expand and view a list of additional reports, follow the instructions in the Displaying Additional Reports section on page 21.

Follow the below directions to quickly view the *most current/recent reports* from the SHMSBILL list:

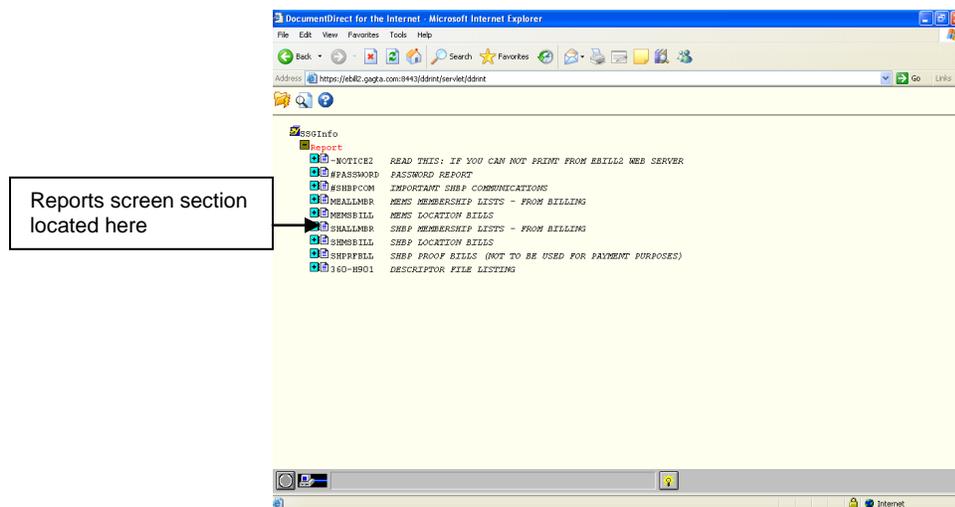


Figure 15 - DocumentDirect for the Internet Screen (DocumentDirect Screen)

- Click the blue notepad icon in front of the **SHMSBILL** report name (Figure 16)

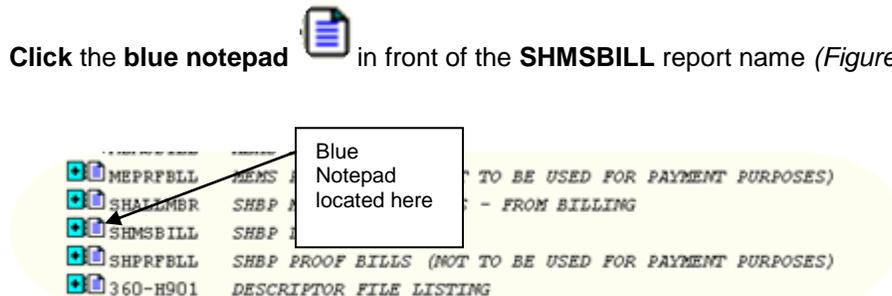


Figure 16 - Blue Notepad (DocumentDirect Screen)

The Process Summary screen for the most recently generated report from the SHMSBILL list will display in a pop-up window (Figure 17).

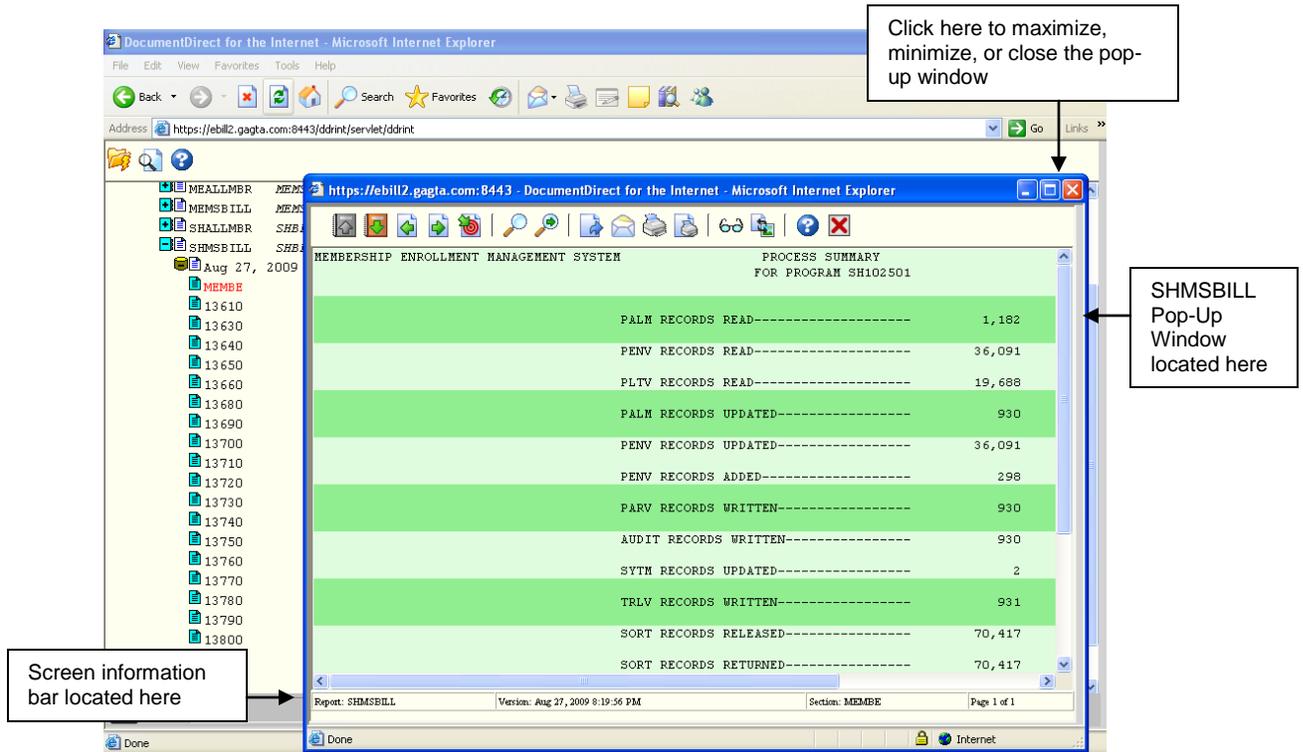


Figure 17 - SHMSBILL Pop-Up Window

To maximize the size of the pop-up window to display as full screen on your PC, click on the box in the upper right hand corner (middle box) of the pop-up window (Figure 17). You may also minimize and close the pop-up windows from this screen location. Click on the first box to minimize the screen; and the last box to close the pop-up window.

The screen information bar is located at the bottom of the pop-up window (Figure 17). The screen information bar will display the report name, report version (date), section of the report currently displayed, and the number of the pages contained in the report including the current page being displayed in the pop-up window (Figure 17a).

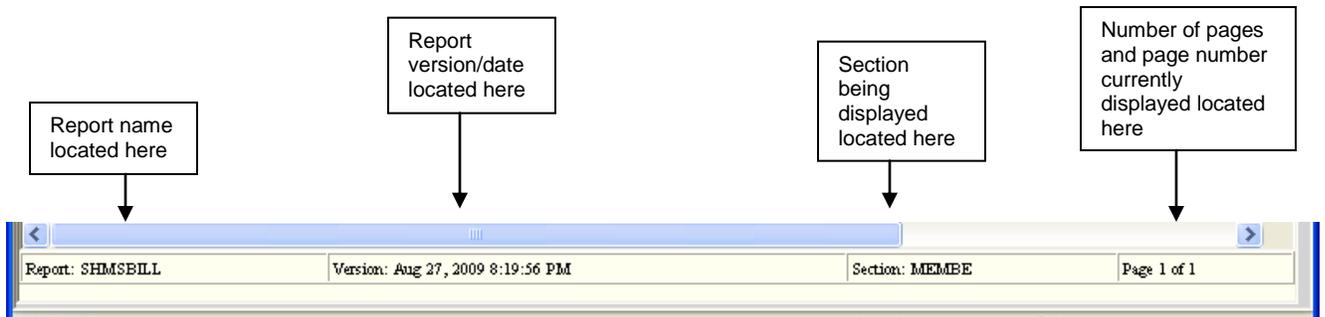


Figure 17a - SHMSBILL Pop-Up Window Screen Information Bar

The list of SHMSBILL reports available for view (per payroll location number) are displayed to the left of the pop-up window (Figure 18). The report currently being displayed in the pop-up window will display in the color red.

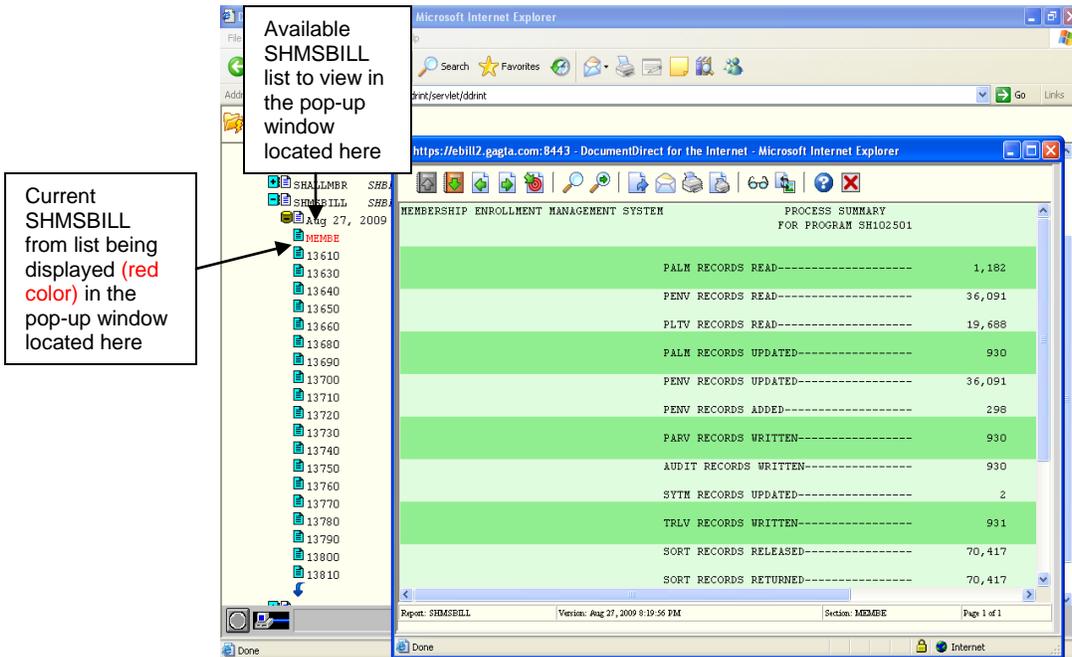


Figure 18 - SHMSBILL Reports Available for View

**Note:**  
More than one pop-up window may be displayed at the same time.

Once a bill list has been accessed for selection and viewing, the report will display the date and time the report was posted, including the report status (Figure 19).

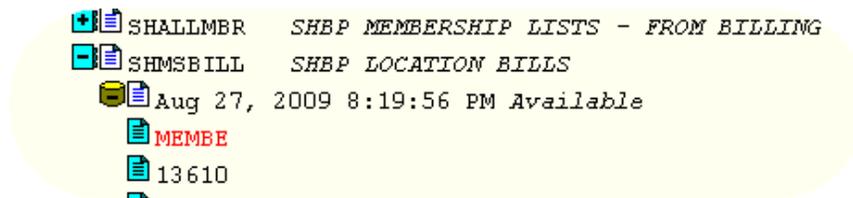


Figure 19 - SHMSBILL Reports Available for View (Aug 27, 2009)

## NAVIGATING DISPLAYED REPORTS

You are now ready to navigate through the selected report. Best practice is to use the **reports navigation tool bar** located at the top of the pop-up window to navigate **within the selected report(s)** (*Figure 20*). You may also select the desired report for viewing by clicking on the report located in the report list, located on the left of the report screen.

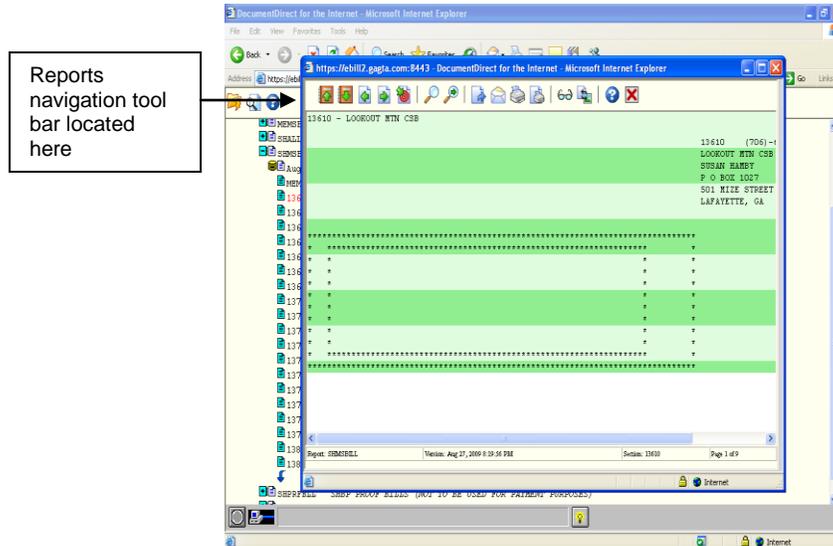


Figure 20 – Report Navigation Tool Bar

The **report navigation tool bar** (*Figure 20a*) includes the following most commonly used push button functions:



Figure 20a - Report Navigation Tool Bar

### Next Document



- Click the **down arrow**, the next document will display.

### Previous Document



- Click the **up arrow**, the previously viewed document will re-display.

### Page Forward



- Click the **forward arrow**, the next page of the current document will display.

### Page Backward



- Click the **back arrow**, the previous page of the current document will re-display.

### Go To...



- Click the **bulls eye push button** to display a specific page(s)

- A pop-up box will display with the total number of pages for the current displayed document (*Figure 21*). **Enter the page number** you would like displayed in the page field (*Figure 21*)
- **Click the green check** (*Figure 21*)

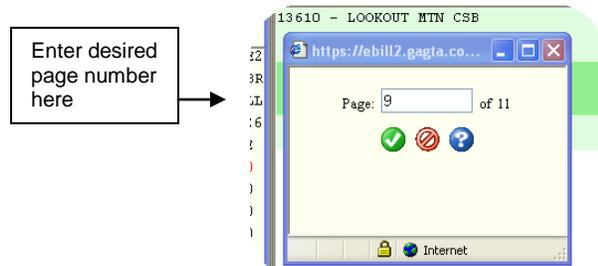


Figure 21 - Go To... Pop-up Box

- The requested page number of the document will display in the bottom right hand corner of the information bar (*Figure 21a*)

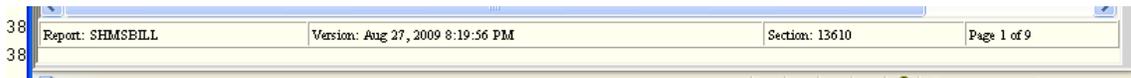


Figure 21a - Go To... Pop-up Box Information Bar

### - Find ...

- **Click the magnifying glass push button** to initiate this search feature
- A pop-up box will display (*Figure 22*)
- **Enter the word or phrase in the Find What field** (*Figure 22*)
- **Click the box in front of the As Is (Case Sensitive) field if you want the search to be case sensitive to your entry (complete document search)** (*Figure 22*)
- **Click the box in front of the Current Section Only field if your want your search to be confined to the current displayed section of the document** (*Figure 22*)
- **Click the Up or Down Push Button in the Direction Field to determine the direction of your search in the displayed document** (*Figure 22*)
- **Click the magnifying glass** (*Figure 22*)

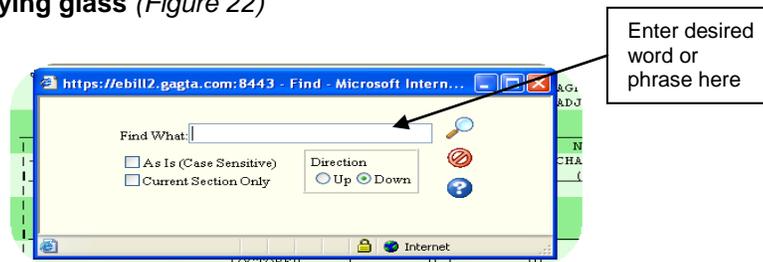


Figure 22 - Find... Pop-up Box

The **first entry** matching your search criteria will display.

**- Find Next ...**



**Note:** Clicking on this icon goes to the next entry that matches the search or “Find” criteria that was previously entered (Figure 22).

**- Change View**



- Click the **glasses push button** (change the view of the document in windows)
- A pop-up box will display (Figure 23)
- Click your selection in the **Scale field** using the scroll
- Click the **push button** in front of your selection in **Fit field** (you may also enter a number in the % area) (Figure 23)



Figure 23 - Find... Pop-up Box

- Click the **green arrow paper push button** (Figure 23)

The view of the document will display in the window as specified.

**Format Page**



- Click the **pages with the black arrows** push button
- A pop-up box will display with a choice of Format (Figure 24)
- Click the format choice in the **Format field** (Figure 24)
- Click the **green arrow paper push button** (Figure 24)

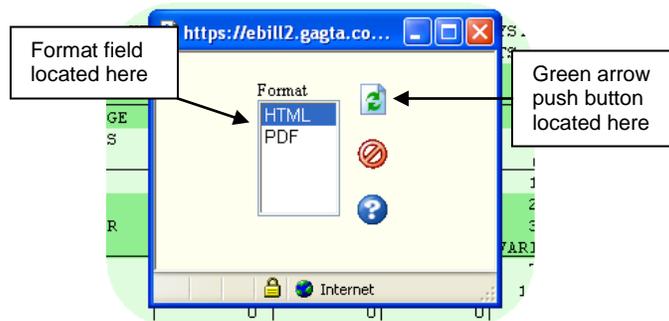


Figure 24 - Find... Pop-up Box

- Help (Online Help) 

Online help provided by the software vendor.

- Exit 

- Click the “red X” push button located on the report navigation tool bar
- All displayed report pop-up boxes will be closed; the **reports screen** will still display (Figure 25)

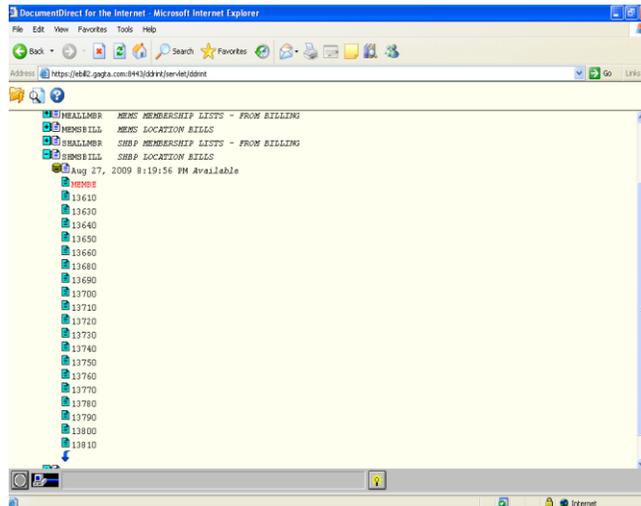


Figure 25 - Exit Reports

You may now select another report for viewing.

## DISPLAYING ADDITIONAL REPORTS

All reports (per payroll location) may not be displayed on the DocumentDirect screen. Additional reports may be collapsed on the reports list using a blue arrow . **Follow the below directions to display, view and select additional reports:**

- Locate the blue arrow near the bottom of the report list using the scroll; **Click the blue arrow** (Figure 26) to display the complete list of reports

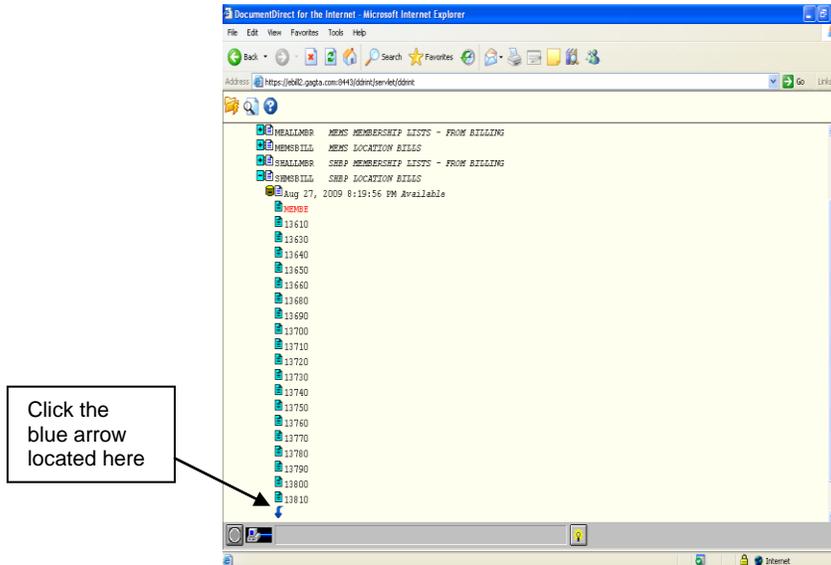


Figure 26 - Additional Reports

A list of additional reports will display (Figure 26a). The blue arrow will redisplay at the bottom of the list when there are still additional reports to view.

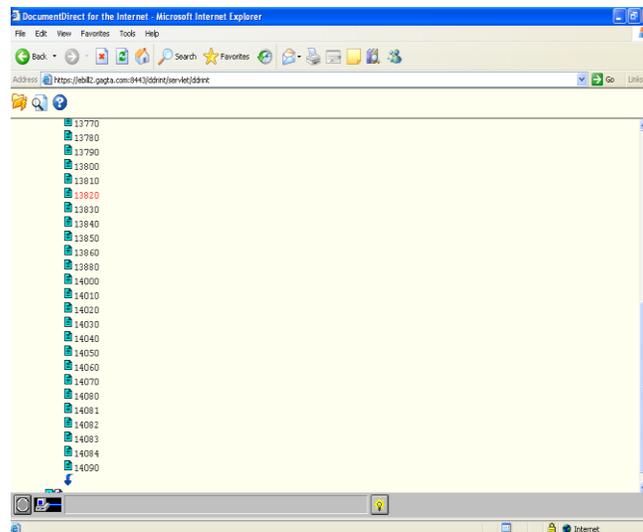


Figure 26a - Additional Reports

Once the report list has been expanded by clicking on the blue arrow, the report list may be collapsed.

- **Click** on the Minus Sign  located to the right of the report date (Figure 27)

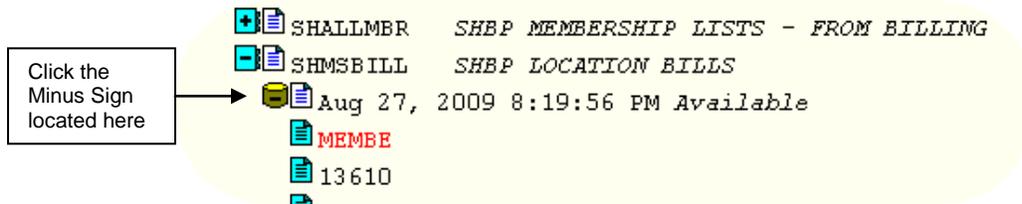


Figure 27 - Expanded Report List

The report list will collapse into the report date and the minus sign will revert back to a Plus Sign  (Figure 28).

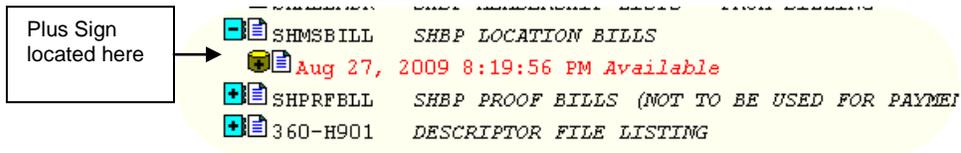


Figure 28 - Collapsed Report List

## SELECTING AND VIEWING AVAILABLE & RECALL REQUIRED REPORTS

Although the most current/recent report(s) may be selected and viewed quickly by clicking on the blue note pad; a full list of reports may be displayed for selection and viewing. **The full lists of reports include Available and Recall Required reports.** Current/Recent reports will list as Available reports.

Follow the below directions to view and select Available and Recall Required reports:

Access the DocumentDirect screen (*Figure 29*).

- Click the plus sign  next to the report name (*Figure 29*)

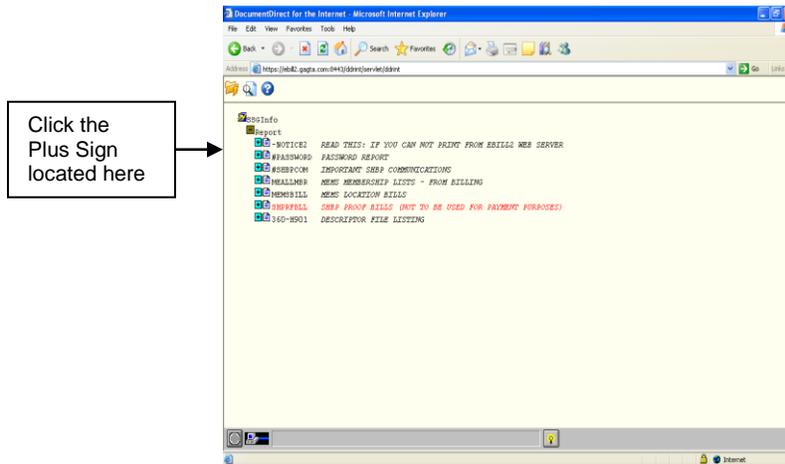


Figure 29 - DocumentDirect Screen

The full list of Available and Recall Required reports will display (*Figure 30*). The selected report will display in the color red on the report list. The report list will display including reports that are Available (+) and archived in the system, indicating Recall Required (X).

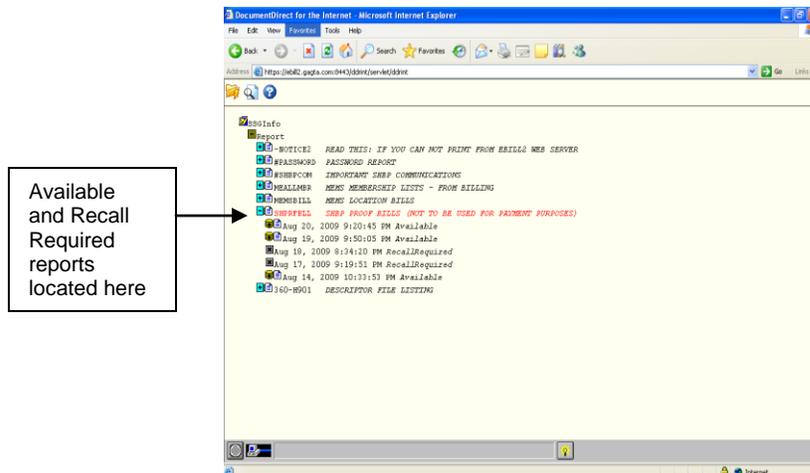


Figure 30 - Available & Recall Required Report List

- Click the **plus sign**  next to the report date (Figure 31) to expand the report list for selection and viewing

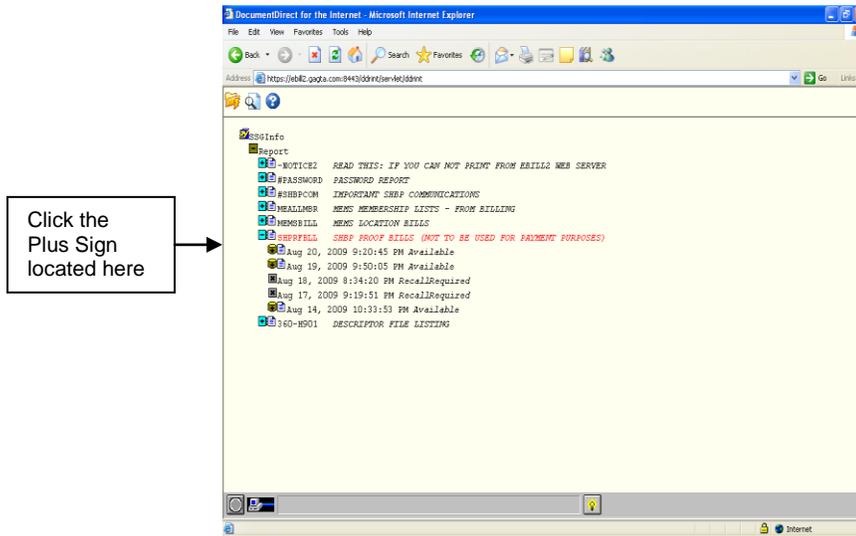


Figure 31 - Expanded Report List Screen

To display a Recall Required report from the list for viewing and selection, follow the below directions:

- Click the **"X" sign**  next to the report date (Figure 32)

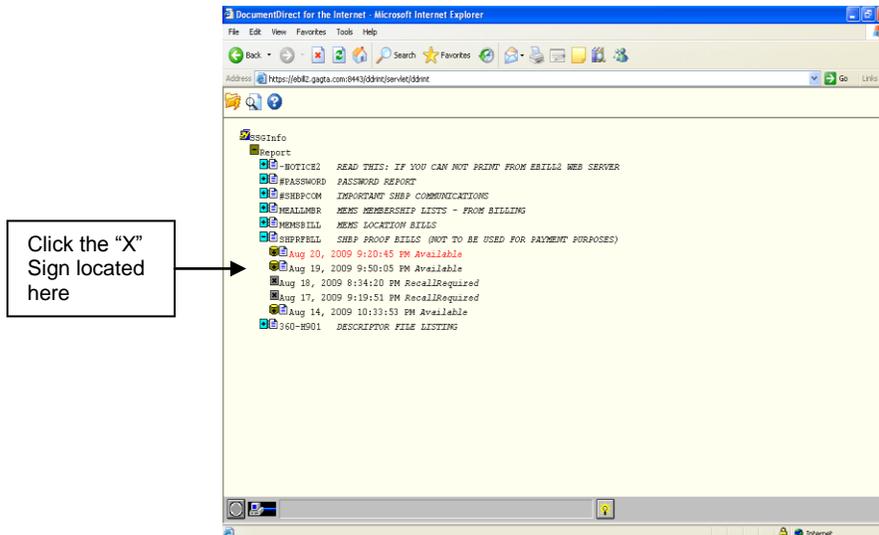


Figure 32 - Recall Required Selection

A pop up box will display stating, 'Recall request issued. Try again later.'

- Click the OK push button (Figure 33)

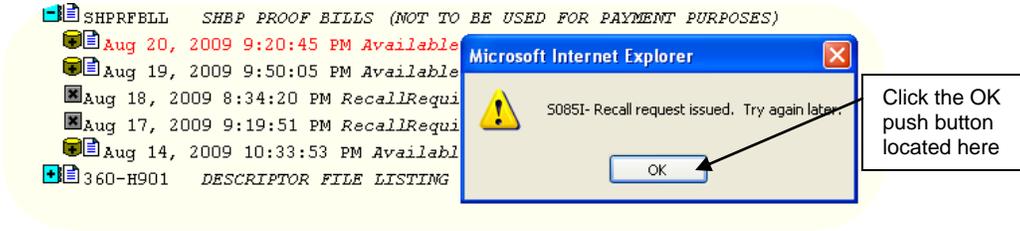


Figure 33 - Recall Required Pop-up Box

The system has begun the process of downloading the selected file for selection and viewing.

- Click the "X" sign  next to the report date (Figure 34)

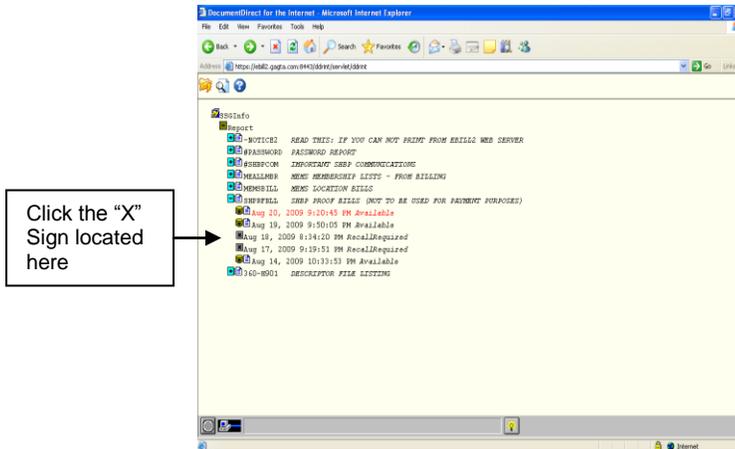


Figure 34 - Report List

The Recall Required report list will display under the selected report date (Figure 35). You may now select a report from the list for viewing.

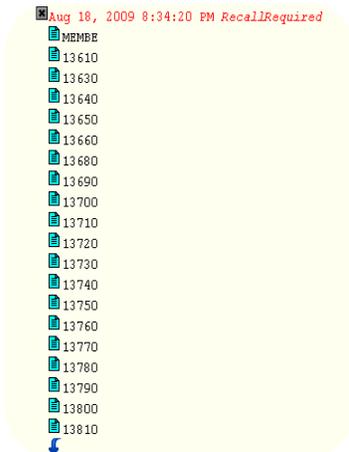


Figure 35 - Recall Required Report List

## LOCATING AND OPENING REPORTS FROM THE TOOL BAR

The three push buttons, located in the top left hand corner of the DocumentDirect screen may be used to open a report, find specific report, or receive online help (Figure 36).

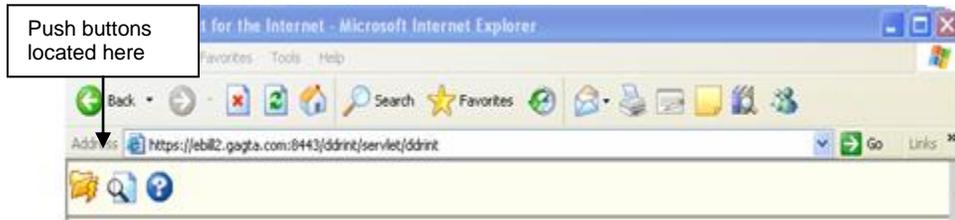


Figure 36 - Push Buttons (DocumentDirect Screen)

By clicking on the below push button(s), you will be able to:

### - Open (Open a Report)

Select a report list, **Click** on the **folder** push button, then the first report on the report list selected will display from the DocumentDirect screen.

### - Locate (Find a Specific Report)

This item is very helpful to find a report faster than following the “drill down”

selection path using the blue arrow . **You may locate a report by Report ID from the DocumentDirect screen as follows:**

- Click on the **plus sign**  next to the report name (Figure 37) to open the report list (**SHMSBILL has been used in this example**)

Report	
 -NOTICE2	READ THIS: IF YOU CAN NOT PRINT FROM EBILL2 WEB SERVER
 #PASSWORD	PASSWORD REPORT
 #SHBPCOM	IMPORTANT SHBP COMMUNICATIONS
 MEALLMBR	MEMS MEMBERSHIP LISTS - FROM BILLING
 MEMSBILL	MEMS LOCATION BILLS
 SHALLMBR	SHBP MEMBERSHIP LISTS - FROM BILLING
 SHMSBILL	SHBP LOCATION BILLS
 SHPRFBLL	SHBP PROOF BILLS (NOT TO BE USED FOR PAYMENT PURPOSES)
 360-H901	DESCRIPTOR FILE LISTING

Figure 37 - ViewDirect Report List

The expanded list of SHMSBILL Reports by date will display (Figure 38)

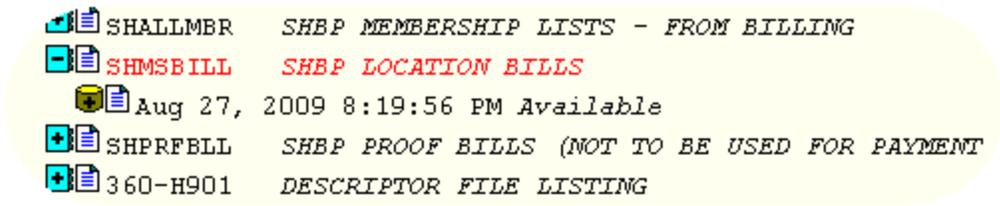


Figure 38 - Expanded SHMSBILL Report List (by date)

- Click the plus sign  next to the report date (Figure 39) to expand the report list for that date

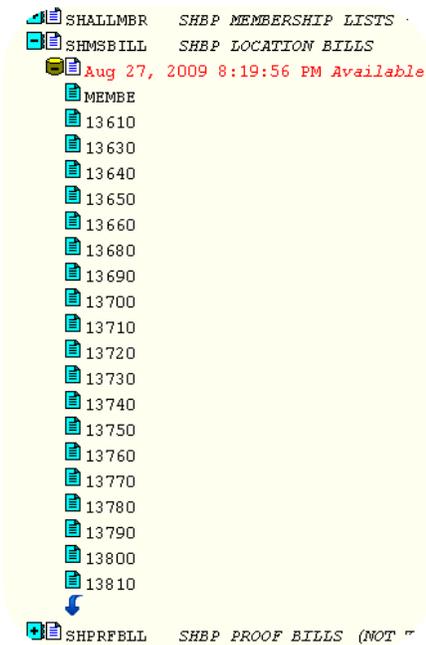


Figure 39 - Expanded Report List



- **Click on the Locate push button**  
(Figure 40, located in the top left hand corner of the screen)

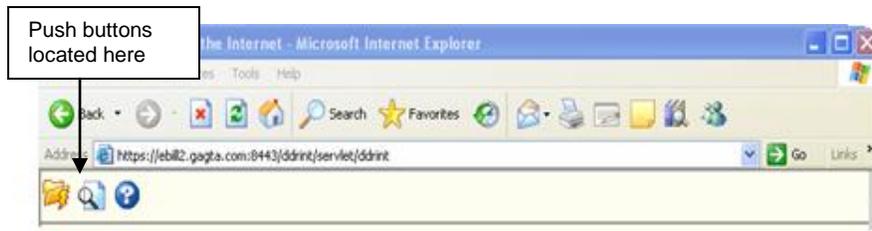


Figure 40 - Push Buttons (DocumentDirect Screen)

The **Locate pop-up box by Report ID** will display (Figure 41) with pre-populated fields.

Although the Locate Pop-up Box offers the selection of two locate tabs  (Report ID and Topic), the system default is to display the **Report ID Tab**. **The Topic Tab is the secondary tab in the pop-up box and is not utilized in the application.**

- **Enter the five digit payroll location number related to the report you want to locate in the Section ID field** (all other pre-populated fields should not be changed) (Figure 41)
- **Click the locate push button** (located on the right side of the pop-up box) (Figure 41)

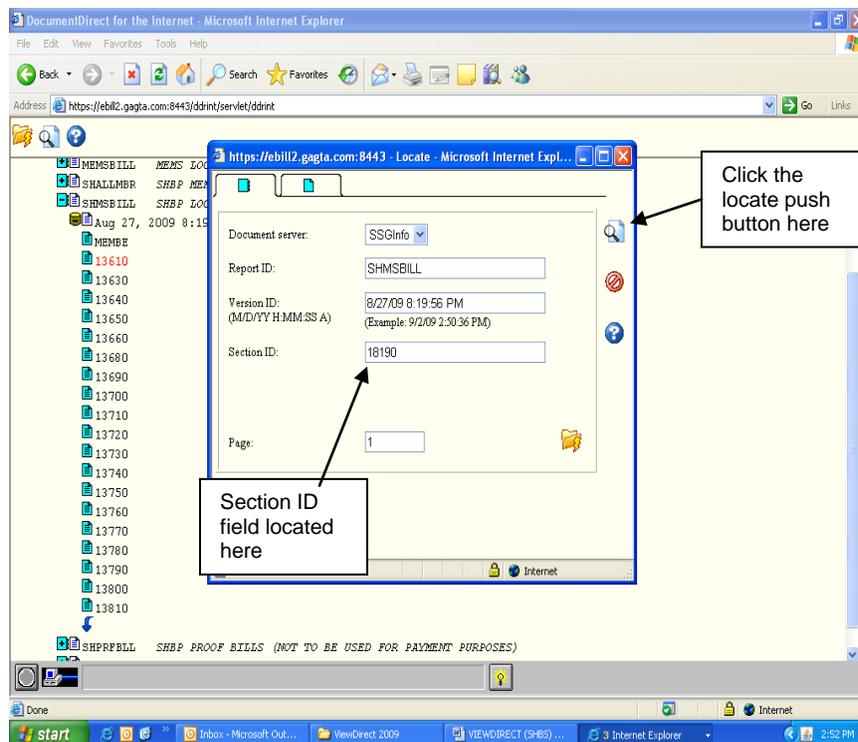


Figure 41 - Locate Pop-up Box

The report will display in red at the top of the report list (Figure 42) according to criteria entered in the Locate Pop-up Box.

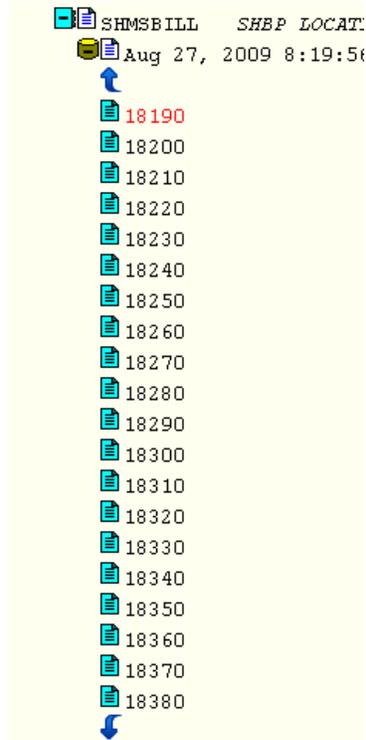


Figure 42 - Expanded Report List after Locate by Report ID

- Help (Online Help) 

Provided by software vendor.

## DOWNLOADING REPORTS

**Pop-up blockers must be turned off to download reports in ViewDirect.**

Once a report has been selected and displayed for viewing, follow the 'Best Practice' directions below to Download the report:

- Click the **Download push button**  located on the navigation tool bar of the displayed report (Figure 43)



Figure 43 - Navigation Tool Bar

**Note:**

Internet Explorer may block pop-up windows or file downloads that might not be safe. When this occurs, an Information Bar pop-up window will display asking, 'Did you notice the Information Bar?' (Figure 44).



Figure 44 - Information Bar Pop-up Window

- Click the **OK** push button (You may also place a check in the field prompting 'Do not show this message again.');

The Information Bar (located at the top of the browser) will display a message stating, 'To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for Options...'. (Figure 45). To unblock the Internet Explorer site:

- Click on 'Click here for options...' on the Information Bar (Figure 45)



Figure 45 - Information Bar

An options box will display on the Information Box (Figure 46).



Figure 46 - Information Bar Options Box

The Information Bar Options (Figure 46a) are:

Option	Description
Download File...	Unblocks Internet Explorer to allow the downloading of files
What's the Risk?	Explains the risk of downloading files to Internet Explorer
Information Bar Help	Provides answers to frequently asked questions

Figure 46a - Information Bar Options

- Click on 'Download File...' on the Information Bar (Figure 46)

The Download pop-up box will display (Figure 47).

- Click the **desired push button** related to the pages you want to download in the **Pages Field** (Figure 47)

The Pages field descriptions are as follows:

- **All** will download all of the reports (Figure 47)
- **Current Section** will download all pages of the report that is displayed on the screen
- **Current Page** will download the page displayed on the screen (system default)
- **From x to x** will download the specific pages that are selected (from and to) (Figure 47)

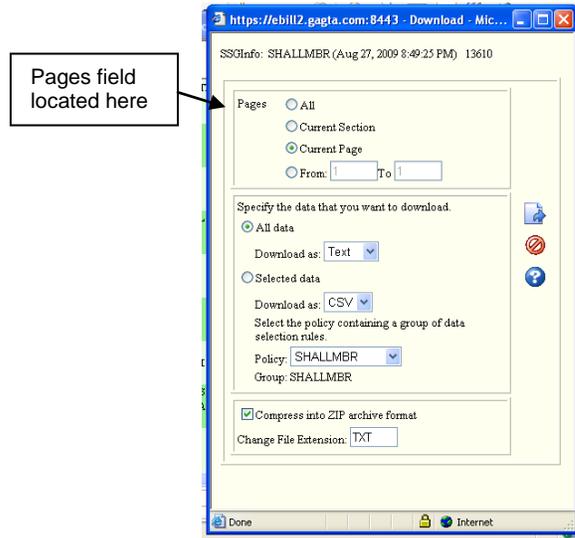


Figure 47 - Download Pop-up Box

- Click the **Selected data push button** in the 'Specify the data that you want to download' field (Figure 48)

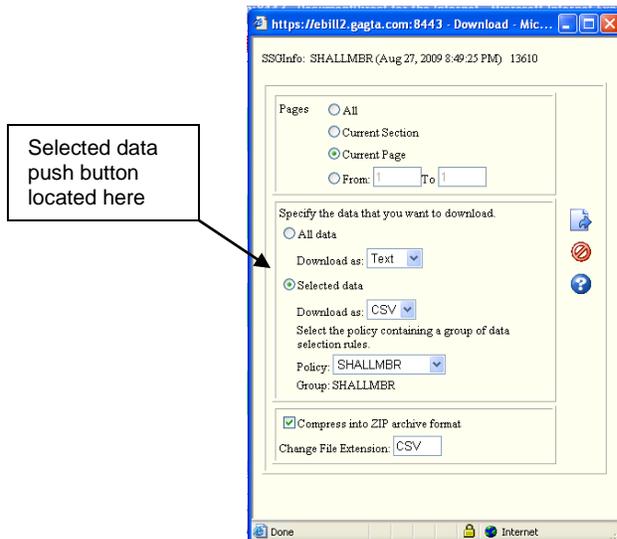


Figure 48 - Download Pop-up Box

**Best Practice:**

Listed below are the 'Specify the data that you want to download' field Best Practice(s):

- The system default is All data (Figure 49). It is 'Best Practice' not to select the All data push button when downloading a report. It is 'Best Practice' to select the Select Data push button when downloading a report.
- The system default is Text formatting in the Download as: drop down box. It is 'Best Practice' to leave the selection as 'Text', unless otherwise indicated in your specific selection from the ViewDirect Report Descriptions table (pages 44 through 46). To make another selection, click the arrow on the drop down box (Figure 44).

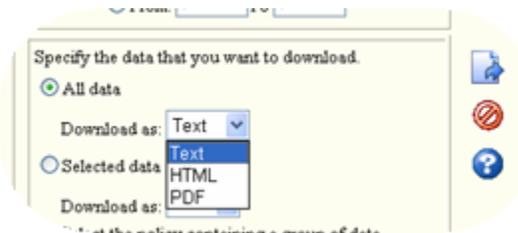


Figure 49 - Download Pop-up Box

**Best Practice:**

The system default is 'CSV' displayed in the associated Download as: drop down box (Figure 50). It is 'Best Practice' to have 'CSV' remain as the selection in this drop down box. To make another selection, click the arrow on the drop down box.

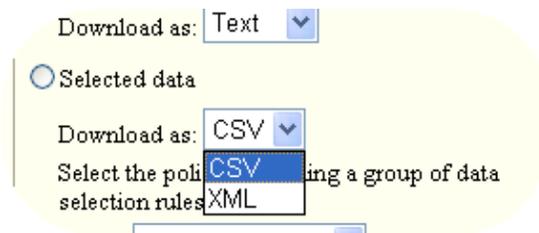


Figure 50 - Download Pop-up Box

**The policy abbreviations listed in the 'Policy' drop down box are configured to the export method of the ViewDirect Report. Please refer to pages 44 through 46 for ViewDirect Report Descriptions and required policy/export methods.**

- Click the **Policy (export method) drop down box arrow** located under 'Select the policy containing a group of data rules' (*Figure 51*) to display available Policies (use the scroll bar for additional displays)

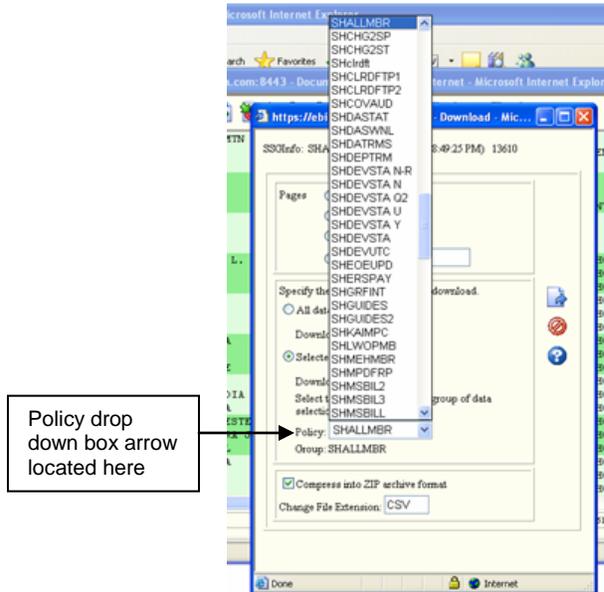


Figure 51 - Download Pop-up Box

**Note:**

**Please refer to the ViewDirect Report Descriptions table (pages 44 through 46) to determine the appropriate Policy (Export Method) and formatting per report.**

- Click **SHALLMBR** from the **Policy drop down box** (*Figure 52*) located under 'Select the policy containing a group of data rules' (SHALLMBR has been used in this example)

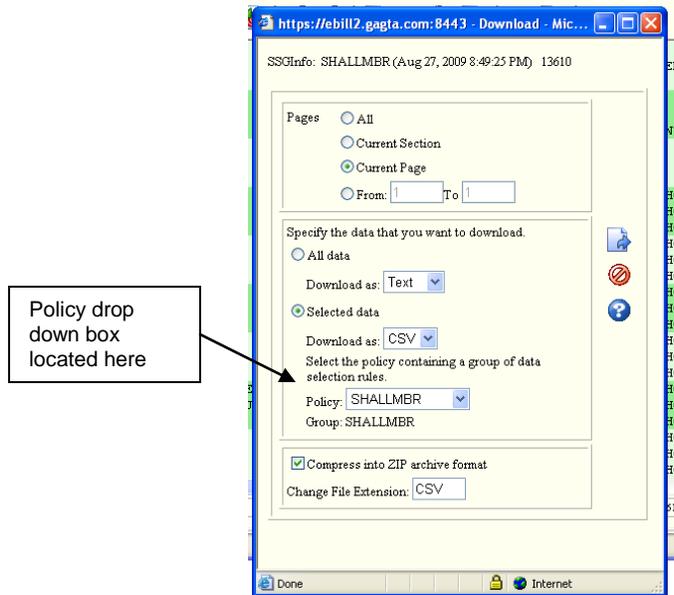


Figure 52 - Download Pop-up Box

**Best Practice:**

The system default is the selection of 'Compress into ZIP archive format' (Figure 53). It is 'Best Practice' not to change this system default.

The 'Change File Extension' box (Figure 53) is driven by the 'Download as' selection (Figure 50).

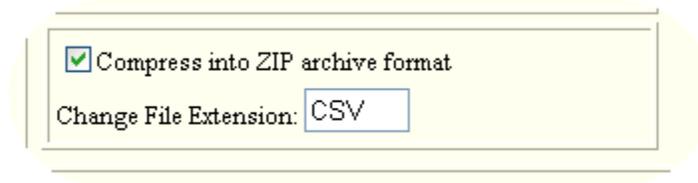


Figure 53 - Download Pop-up Box

- Click the **Create push** button located on the right hand side of the pop-up box (Figure 54)

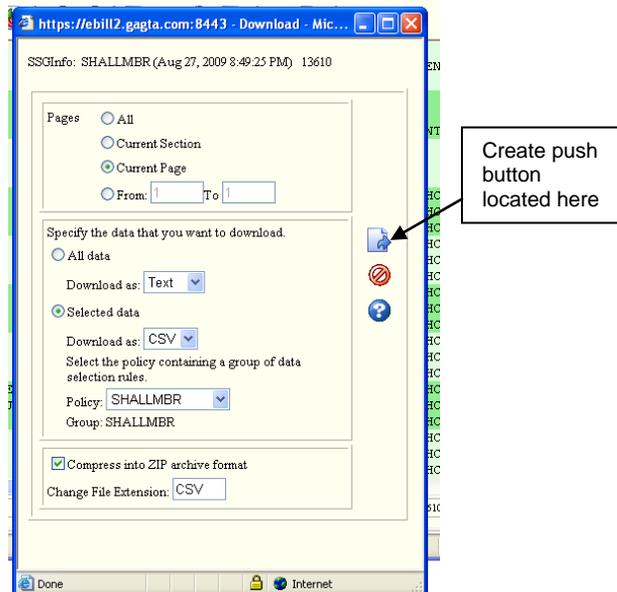


Figure 54 - Download Pop-up Box

**Note:**

To download an Excel Spread Sheet format, select 'Selected Data' push button; the Download as field should display CSV (Figure 54).

The **File Download** screen will display (Figure 55) asking, 'Do you want to open or save this file?'

- Click the **Open** push button (Figure 55)

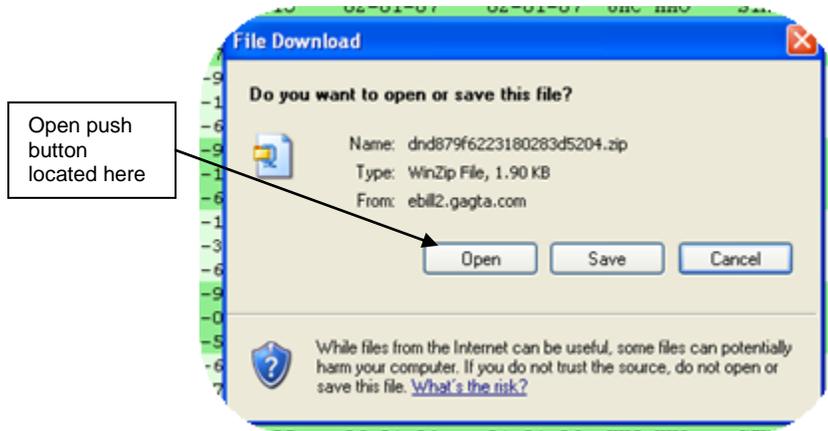


Figure 55 - File Download Pop-up Box

**Best Practice:**

It is 'Best Practice' to Open the downloaded file for viewing before saving the file. This practice enables you to make sure you are downloading the correct data. You may also choose to save the file by pressing the 'Save' push button if you are certain you have the correct data.

The WinZip screen will display with a listing of downloaded file(s) (Figure 56). To open the downloaded data file:

- Click on the **downloaded file name** (Figure 56)

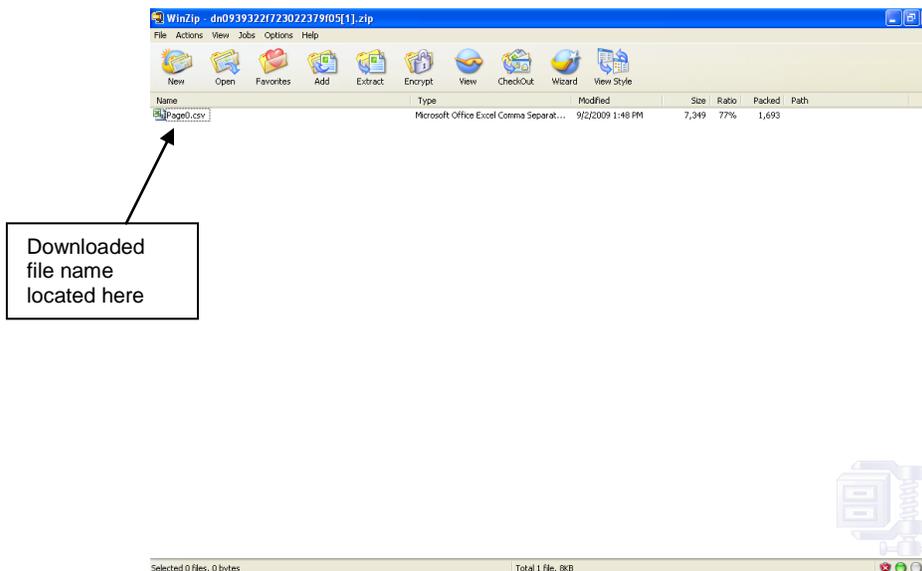


Figure 56 - WinZip Screen

**Note:**

**WinZip must be loaded on the computer to download or open the downloaded data. Follow the instructions loaded on WinZip for unzipping files on your computer system.**

***Pop-up Blockers must be turned off to download reports. Please consult your IT staff if adjustments are needed to your internet tools/security settings regarding your download being blocked.***

A WinZip pop-up box will display (Figure 57) asking, 'Do you want to open this file?'

- **Click** the **Open** push button (Figure 57)

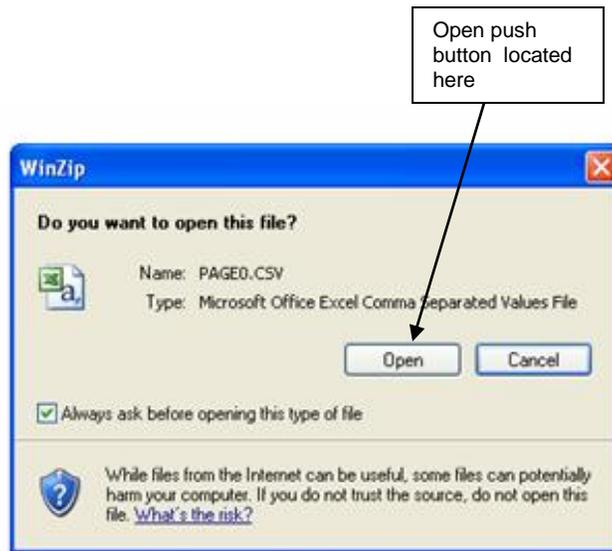


Figure 57- WinZip Pop-up Box

The file data will open in the requested format; Excel was the format requested in this example (Figure 58).

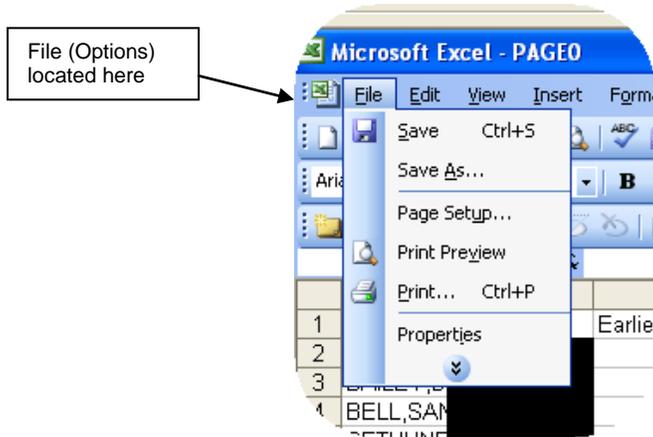
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Name	Member ID	Earliest_EFDT	Effective_DT	Option	Type	Location_Sort_Key	Sex	DOB				
2	ANDERSON		2/1/2007	2/1/2007	UHC	HMO SINGLE		10000	FEMALE				
3	BAILEY, D		11/1/2008	11/1/2008	UHC	HMO SINGLE		10000	FEMALE				
4	BELL, SAN		1/1/2005	1/1/2005	UHC	HMO SINGLE		10000	FEMALE				
5	BETHUNE		1/1/2009	1/1/2009	UHC	HMO SINGLE		10000	FEMALE				
6	BISHOP, T		1/1/2005	1/1/2006	UHC	HMO SINGLE		10000	FEMALE				
7	BOLES, S		7/1/2000	3/1/2006	UHC	HMO SINGLE		10000	FEMALE				
8	BRADFOR		6/1/2008	6/1/2008	UHC	HMO SINGLE		10000	FEMALE				
9	BREWER		5/1/2008	5/1/2008	UHC	HMO SINGLE		10000	MALE				
10	BUCHANAN		1/1/2008	1/1/2008	UHC	HMO SINGLE		10000	FEMALE				
11	BURRY, D		7/1/2000	1/1/2006	UHC	HMO SINGLE		10000	MALE				
12	CARREAT		12/1/2007	12/1/2007	UHC	HMO SINGLE		10000	FEMALE				
13	COLLETT		10/1/2007	1/1/2009	UHC	HMO SINGLE		10000	FEMALE				
14	DILLINGE		2/1/2009	2/1/2009	UHC	HMO SINGLE		10000	FEMALE				
15	DOBBLA		7/1/2008	7/1/2008	UHC	HMO SINGLE		10000	FEMALE				
16	ELLIS, SA		7/1/2000	7/1/2005	UHC	HMO SINGLE		10000	FEMALE				
17	FREEMAN		3/1/2002	7/1/2003	UHC	HMO SINGLE		10000	FEMALE				
18	GARRETT		7/1/2000	2/1/2009	UHC	HMO SINGLE		10000	FEMALE				
19	GOBBEL,		6/1/2004	1/1/2006	UHC	HMO SINGLE		10000	FEMALE				
20	HEINER, K		7/1/2008	7/1/2008	UHC	HMO SINGLE		10000	FEMALE				
21	HEMBRE		5/1/2006	5/1/2006	UHC	HMO SINGLE		10000	FEMALE				
22	HEYDE, S		8/1/2001	1/1/2007	UHC	HMO SINGLE		10000	FEMALE				
23	JOHNSON		7/1/2000	1/1/2008	UHC	HMO SINGLE		10000	FEMALE				
24	KELLER, M		7/1/2000	7/1/2005	UHC	HMO SINGLE		10000	FEMALE				
25	LEWIS, JA		7/1/2000	5/1/2008	UHC	HMO SINGLE		10000	FEMALE				
26	MARSH, T		1/1/2007	1/1/2007	UHC	HMO SINGLE		10000	FEMALE				
27	MAXEY, K		7/1/2000	1/1/2009	UHC	HMO SINGLE		10000	FEMALE				
28	MCWHIRT		11/1/2008	11/1/2008	UHC	HMO SINGLE		10000	MALE				
29	MORRIS, C		7/1/2000	7/1/2003	UHC	HMO SINGLE		10000	FEMALE				
30	MOULTON		10/1/2008	10/1/2008	UHC	HMO SINGLE		10000	FEMALE				

Figure 58- Microsoft Excel Downloaded Screen

**Note:**  
The member's full name, Member ID and Date of Birth (DOB) are not displayed in Figure 58 to remain in compliance with HIPAA guidelines.

Once you have verified the correct file has been downloaded, you may save the document.

- **Click** on **File** located on the Task Bar (*Figure 59*); the options listed under File will display



*Figure 59 - Microsoft Excel Downloaded Screen*

You may now select the File option of Save or Save As, to save the document in the desired location.

## PRINTING REPORTS

Once a report has been selected and displayed for viewing, follow the below directions to Print the report to a local desktop printer or local LAN printer:

- Click the **Print push button**  located on the navigation tool bar of the displayed report (*Figure 60*)

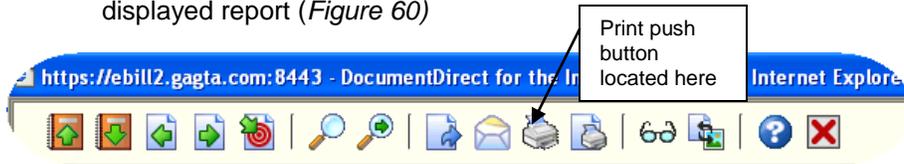


Figure 60 - Print Push Button

The report to print pop-up box will display (*Figure 61*).

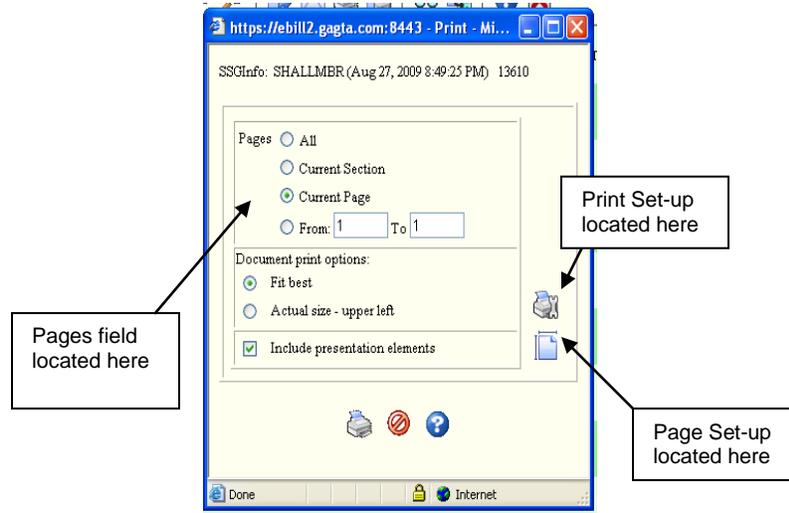


Figure 61 - Report to Print Pop-up Box

- Click your **selection in Pages field** - depending on what is necessary to print
  - **ALL** will print all pages for the selected report
  - **Current Section** will print all pages of the report that is displayed on the screen
  - **Current Page** will print the page displayed on the screen
  - **From x to x** will print specific pages that are selected (from and to)

Make any necessary adjustments to the **Print Set-up** and **Page Set-up** by clicking on the associated push buttons (*Figure 61*). Reports should be printed as Landscape in order to print on one page.

Once you have completed all necessary selections on the report to print pop-up box...

- Click the **print push button** at the bottom of the report to print screen (Figure 62)

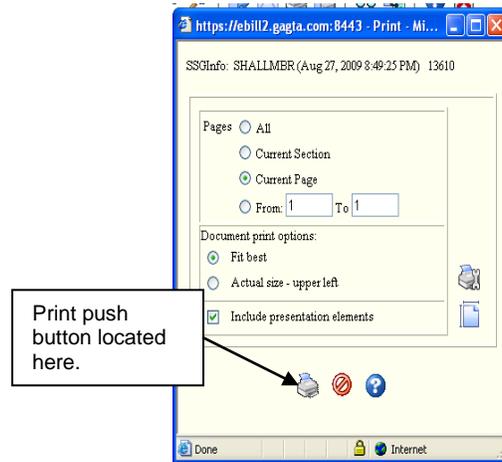


Figure 62 - Report to Print Pop-up Box

The print confirmation pop-up window will display, confirming the completion of the print job requested (Figure 63).



Figure 63 - Print Confirmation Pop-up Window

The requested print job is now ready to be retrieved from the appropriate printer.

**Note:**

**Pop-up Blockers must be turned off to print reports. For additional instructions regarding the installation of "Print Manager" or if you cannot print from the ViewDirect Web server, please refer to the print information listed under Reports/Notice2 on the Document Direct for the Internet Screen (Figure 7 on page 8).**

## QUICK PRINT REPORTS

The Quick Print function will print from the previous settings requested through the Print push button located on the reports navigation tool bar.

**Follow the below directions to Quick Print the report to a local desktop printer or local LAN printer:**

- **Click the Quick Print push button**  located on the navigation tool bar of the displayed report (Figure 64)

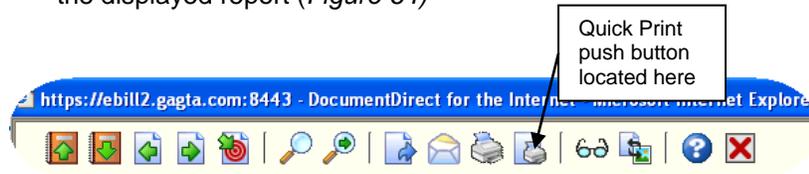


Figure 64 - Quick Print push Button

The print confirmation pop-up window will display, confirming the completion of the print job requested (Figure 65).

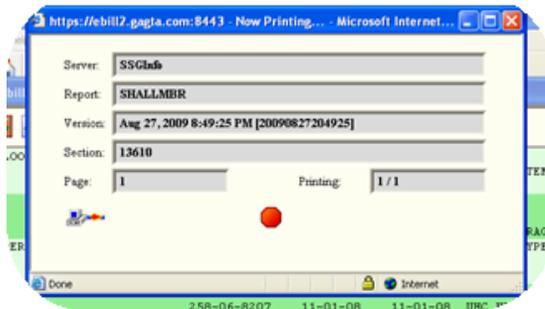


Figure 65 - Print Confirmation Pop-up Window

The requested print job is now ready to be retrieved from the appropriate printer.

**Note:**  
**Pop-up Blockers must be turned off to print reports.**

## ViewDirect LOG OUT

Follow the below directions to log out of the ViewDirect system:

Once all report pop-up windows have been closed, the DocumentDirect for the Internet screen will remain displayed (Figure 66).

- Click the Exit “X” in the upper right hand corner of the screen (Figure 60)

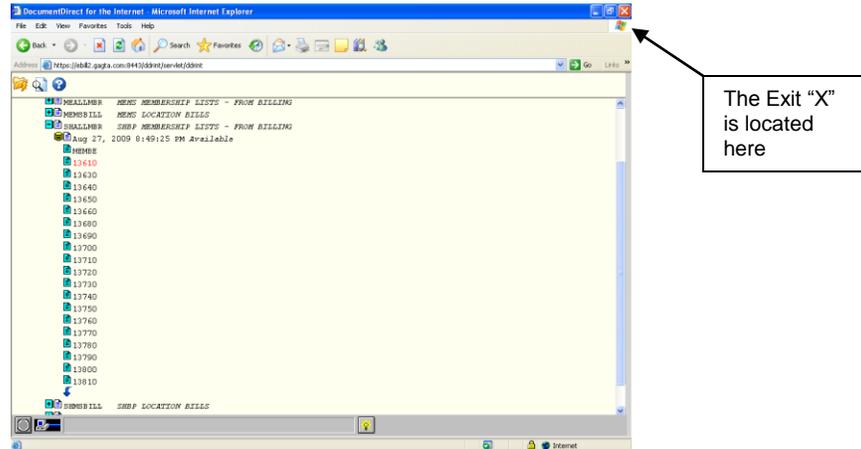


Figure 66 - DocumentDirect Screen

The ViewDirect Log On screen will redisplay (Figure 67).

- Click the Exit “X” in the upper right hand corner of the screen (Figure 67)

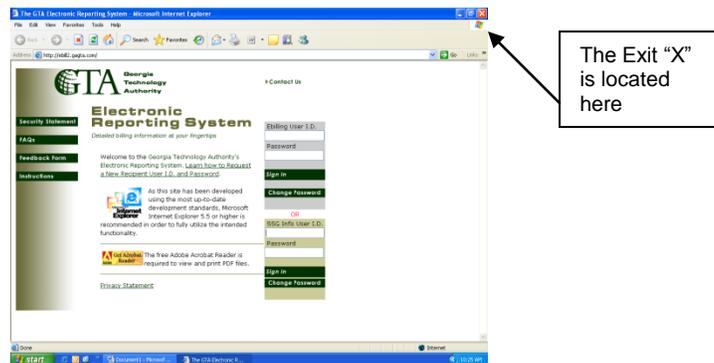


Figure 67 - ViewDirect Log On Screen

The ViewDirect session will disconnect, redisplaying your computer desktop application or the last application displayed on your system.

VIEWDIRECT REPORT DESCRIPTIONS		
Report Name	Frequency	Content
<b>SHALLMBR</b>  Membership Lists – From Billing	Monthly  (Also at end of OE)	Monthly report generated in conjunction with the monthly SHBP billing listing all members and their coverage selections for the month. Report is also generated after the close of Open Enrollment. The report generated at this time will list all changes made during open enrollment except for discontinuations. <b>Download to Excel format using export method (policy): SHALLMBR.</b>
<b>SHCHG2ST</b>  SHBP Possible Tier/Covered Dependent Discrepancies	Daily	Generated daily. Lists employees possibly having inappropriate tier as no dependents are currently covered. Discrepancy may be due to employee's failure to provide approved dependent eligibility documentation in a timely manner. Payroll location should investigate to determine if appropriate to submit form to change tier. <b>Download to Excel format using export method (policy): SHCHG2ST.</b>
<b>SHDATRMS</b>  SHBP Dependents Not Verified Report	Daily	Generated Daily. Lists employees having dependents for which dependent verification documentation has been requested, but approved documentation has not yet been received by SHBP. Coverage for these dependents is subject to being rescinded if documentation is not received in a timely manner. <b>Download to Excel format using export method (policy): SHDATRMS.</b>
<b>SHDEVUTC</b>  SHBP DEV Termination Report	Daily	Generated daily. Lists employees having dependents for which the dependent's coverage has been rescinded due to failure to provide the proper dependent verification documentation within the time specified. <b>Download to Excel format using export method (policy): SHDEVUTC.</b>
<b>SHMISSSN</b>  SHBP Missing Dependent SSN	Monthly	Generated monthly; on the last day of the month. Lists covered members and their dependents for which no Social Security Number (SSN) has been provided for the dependent in the State Health Benefit System. <b>Download to Excel format using export method (policy): SHMISSSN.</b>

Report Name	Frequency	Content
<b>SHMSBILL</b>  SHBP Location Bills	Monthly	Generated Monthly. SHBP Billing. <b>Download report 360-H141 (Current &amp; retroactive Transaction list) to Excel format using export method (policy) SHMSBILL.</b> <i>This export method (policy) includes premium changes.</i> <b>Download report 360-H141 (Current &amp; retroactive Transaction List) to Excel format using export method (policy): SHMSBIL2.</b> <i>This export method (policy) does not include premium changes.</i> <b>Download report 360-H142 (Reported Membership Totals) to Excel format using export method (policy): SHMSBIL3.</b>
<b>SHOEUPDT</b>  SHBP Covered Employee & Discontinuation Interface (Open Enrollment)	Annually	Generated annually after the Open Enrollment period has closed. This report will show all changes made during Open Enrollment utilizing the SHBP Open Enrollment Web Site including premium changes. Provides a listing of employees who elected coverage or employees who discontinued coverage; including the employee's name, SSN, address and telephone number. <b>Download to Text format using export method (policy): SHOEUPDT</b> <b>Download to Excel format using export method (policy): SHOEUPXL</b>
<b>SHPDBILL</b>  SHBP Direct Bills	Monthly	Generated Monthly. SHBP Direct Billing. <b>Download report 360-H141 (Current &amp; retroactive Transaction list) to Excel format using export method (policy) SHPDBILL.</b> <i>This export method (policy) includes premium changes.</i> <b>Download report 360-H141 (Current &amp; retroactive Transaction List) to Excel format using export method (policy): SHPDBIL2.</b> <i>This export method (policy) does not include premium changes.</i> <b>Download report 360-H142 (Reported Membership Totals) to Excel format using export method (policy): SHPDBIL3.</b>
<b>SHPRFBLL</b>  SHBP Location Proof Bills	Daily	Generated Daily. SHBP Proof Bill. <b>Download report 360-H141 (Current &amp; retroactive Transaction list) to Excel format using export method (policy) SHPRFBLL.</b> <i>This export method (policy) includes premium changes.</i> <b>Download report 360-H141 (Current &amp; retroactive Transaction List) to Excel format using export method (policy): SHPRFBL2.</b> <i>This export method (policy) does not include premium changes.</i> <b>Download report 360-H142 (Reported Membership Totals) to Excel format using export method (policy): SHPRFBL3.</b>

Report Name	Frequency	Content
<b>SHPRFDBL</b>  SHBP Proof Direct Bills	Daily	Generated Daily. SHBP Proof Direct Bills. <b>Download report 360-H141 (Current &amp; retroactive Transaction list) to Excel format using export method (policy) SHPRFDBL.</b> <i>This export method (policy) includes premium changes.</i> <b>Download report 360-H141 (Current &amp; retroactive Transaction List) to Excel format using export method (policy): SHPRFDB2.</b> <i>This export method (policy) does not include premium changes.</i> <b>Download report 360-H142 (Reported Membership Totals) to Excel format using export method (policy): SHPRFDB3.</b>
<b>SHSHBPIN</b>  SHBP Cov Employees and Disc Interface	Monthly	Monthly report generated in conjunction with the monthly SHBP billing. Provides same coverage information as SHALLMBR but includes discontinuations and premium information. This report is also generated after the close of Open Enrollment. The report will show all changes made during Open Enrollment including discontinuations. <b>Download to Excel format using export method (policy): SHSHBPXL.</b> <b>Download to Text format using export method (policy): SHSHBPIN.</b>
<b>SHTTP654</b>  SHBP Possible Duplicate Records	Weekly  (Friday nights)	Generated weekly (every Friday night). This detailed report list possible duplicate records.
<b>SHXXXXXR</b>  SHBP Payroll Deduction Compare Detail	Monthly	Generated Monthly upon receipt of payroll deduction information. "XXXXX" represents each location's SHBP payroll location number. This is a detail report showing all discrepancies found when comparing information in the Payroll deduction file with enrollment information contained in the SHBP eligibility system.
<b>SHXXXXXS</b>  SHBP Payroll Deduction Compare Interface File	Monthly	Generated Monthly upon receipt of payroll deduction information. "XXXXX" represents each location's SHBP payroll location number. This is a summary file which can be downloaded into Excel format. See below instructions on downloading this report.

Report Name	Frequency	Content
<p><b>SHWBNCFM</b></p> <p>SHBP Open Enrollment Unconfirmed Covered Employees</p>	<p>Daily</p>	<p>Generated Daily during Open Enrollment period. Lists currently enrolled SHBP members who have not accessed the Open Enrollment Web site to make Open Enrollment elections and respond to surcharge questions. Final report generated each year at the end of the Open Enrollment period.</p> <p><b>Download to Excel format using export method (policy): SHWBNCFM.</b></p>
<p><b>SHWELLNM</b></p> <p>SHBP Wellness Promise Not Met</p>	<p>Weekly</p>	<p>Generated weekly (UnitedHealthcare (UHC) members updated monthly). Lists Cigna and UHC members enrolled in the Wellness Plan Options who have not met the requirements of the Wellness Promise.</p> <p><b>Download to Excel format using export method (policy): SHWELLNM.</b></p>
<p><b>SH523961</b></p> <p>SHBP Web Availability Cross Reference Report</p>	<p>Annually</p>	<p>Generated annually prior to the beginning of the Open Enrollment period. Provides a listing of all employees who currently have SHBP coverage and those provided by the employers as being eligible to enroll for SHBP coverage during Open Enrollment. Contains employee's name, SSN and DOB. Report can be accessed to check above info if employee is experiencing problems logging in on Open Enrollment Web site.</p> <p><b>Download to Excel format using export method (policy): SH523961.</b></p>

## DOWNLOADING COMPARE FILE(S) TO EXCEL FORMAT

Follow the instructions below to download Compare File(s) to Excel Format:

(Throughout these instructions “XXXXX” represents your SHBP payroll location number.)

- Go to ViewDirect
- Select SHXXXXXS
- Select/open the report for the month you want to work with
- Click on the “download” icon on the toolbar at top of the page
- Download window “pop up” box will appear
- It will default to the radio button for “current page” selected. Change to “all”
- Leave everything else in this window as it is
- Click on “create” button. (Top button of three buttons to the right in this window)
- When next window appears, choose “save”
- (When next window appears- watch where you are saving document)
- Change file name to: XXXXX.zip
- Leave “type” as winzipfile
- Save
- Choose “Open”
- Choose “I agree”
- Open “archive.txt” file. Should have “readable” test file
- Go to “File”
- “Save as”
- (Again watch where you are saving this file)
- Change name to “XXXXX.txt”
- Leave everything else as is
- Save

### Next Steps:

- Open Excel
- Go to “file”
- Open
- Locate your document – will probably need to change file type to “all files”
- Select your compare file
- Text import window will appear
- Change “original data type” to “delimited”
- Select “next”
- Change “delimiters” from “tab” to “semicolon”
- Select “next”
- Change “column data format” to text

- Under “Data Preview” select all columns. (First column will be highlighted. Hold shift key and go to last column. Click on this column should select all of them.)
- Select “finish”
- Should now be in Excel format for you to adjust column widths and save

## USER NOTES