

Commonwealth of Massachusetts
Executive Office of Health and Human Services

Virtual Gateway



ESM Reports Guide **Winter 2008 R4v1**

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Module 1: Getting Started

Introduction

Enterprise Invoice Management/Enterprise System Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers and is one of the many services offered through the Virtual Gateway. Use of specific ESM report functionality is discussed in a later module.

This module discusses the following topics:

- What is the Virtual Gateway
 - System Requirements
 - Accessing the Virtual Gateway
 - Accessing Provider Services (including EIM/ESM)
 - Password Management
 - Virtual Gateway Customer Service Information
-

What is the Virtual Gateway?

The Virtual Gateway is a single point on the internet for accessing programs and services offered by the Executive Office of Health and Human Services (EOHHS).

The goal of the Virtual Gateway is to streamline service access and coordinate service delivery. It serves three important groups:

- Internal Health and Human Services staff
- Service Provider staff
- Consumers

In addition to EIM/ESM, the Virtual Gateway also offers:

- **Catalog of Services:** An online catalog with descriptions of several of the most widely used programs in Health and Human Services.
 - **Screening & Referral:** A short online survey for consumers and providers to determine potential eligibility for select EOHHS programs. Multiple services can be assessed at the same time.
 - **Common Intake:** An online data collection tool for registered providers to create applications for multiple EOHHS programs on behalf of clients (login required).
-



What is the Virtual Gateway? (continued)

- **Transitional Assistance Gateway:** An online inquiry tool for registered agencies to view secure case management information for various transitional assistance programs, including Food Stamps, financial assistance, and homeless services (login required).
- **Provider Data Management:** An online service that gives *Purchase of Service (POS)* providers a single place to view, upload and edit information commonly requested by Health and Human Services agencies. The service also provides EOHHS agencies with a single place to view provider information (login required).
- **Service and Transition Planning:** An online tool for registered EOHHS staff and providers to support collaborative treatment planning and referral services for certain children served by EOHHS (login required).
- **IRIS Services for Deaf and Hard of Hearing Consumers:** An online service for providers to request ASL interpreter or CART services on behalf of consumers; for ASL interpreters and CART reporters to post availability schedules, review and apply for open jobs (login required).
- **Homeless Management Information Systems:** The *Homeless Management Information Systems (HMIS)* perform data collection to capture information about citizens who experience being homeless over a period of time (login required).
- **Mental Retardation Quality Management Reporting (HCSIS):** A service for Purchase of Service providers, Department of Mental Retardation (DMR) staff, human rights coordinators, and others to file clinical information and reports on incidents, medication occurrences, restraints, and investigations for DMR clients (login required).
- **Senior Information Management System (SIMS):** An online data collection, case management, and reporting tool for Executive Office of Elderly Affairs (EOEA) agencies and providers. It enables users to track various programs for elders, including intake and referral, home care, nutrition, clinical assessments, and more (login required).



What is the Virtual Gateway?
(continued)

- **Enterprise Invoice Management/Enterprise Service Management (EIM/ESM):** Is a web-based billing and services reporting system for Purchase of Service (POS) providers. (login required).
- **Enterprise Organization Management (EOM):** Allows for administration of organization and staff information (login required).

System Requirements

System Requirements for EIM/ESM and the Virtual Gateway

All computers used to access the Virtual Gateway require Internet Explorer 6.0 or higher.

For the EIM/ESM application, the minimum system requirements are:

- Windows (98, 2000 or XP Business)
- Internet Explorer 6.0 or higher
- 800x600 screen resolution
- 300MHz CPU and 128MB RAM

Additionally, the preferred system features to enhance the performance of EIM/ESM are:

- Windows XP (Business Class)
- 1024x768 screen resolution
- 500MHz CPU and 256MB RAM

Acceptable Alternatives:

- Operating System
 - Mac OS X
- Browsers:
 - Safari (Mac)
 - Firefox
 - Netscape

Note: Testing on the EIM/ESM application has not been conducted on these alternative platforms therefore compatibility issues may result.

Tip: If a lower screen resolution is selected, then the user needs to select the “Smaller” text size.


1. Select the View menu from the Internet Explorer browser.
2. Select **Text Size>>Smaller**.

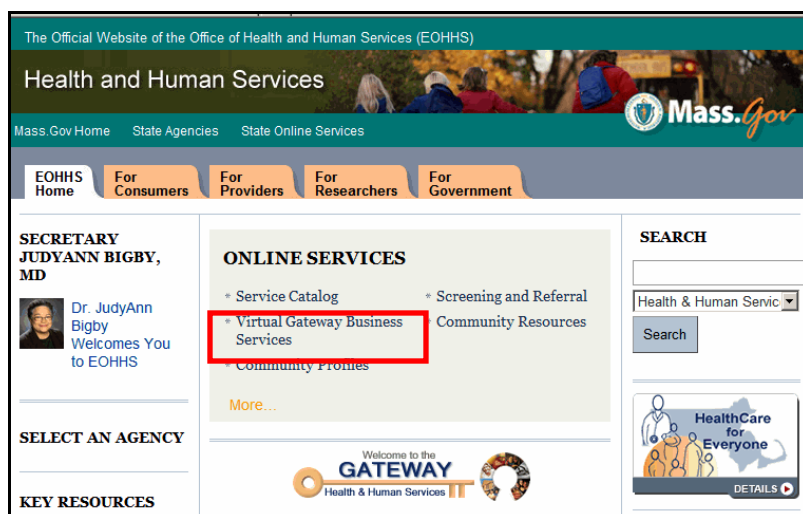


Accessing the Virtual Gateway

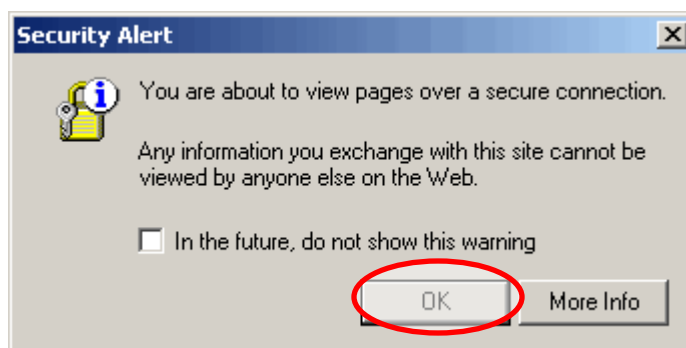
Access to EIM/ESM is through Virtual Gateway Provider Services.
To Access Provider Services:

1. Open an Internet Explorer session.
2. Type the web address mass.gov/eohhs in your browser.


3. Select  from **ONLINE SERVICES** box.



A Security Alert message appears.



4. Click OK.

Tip: Once you are in the Virtual Gateway, you must use the navigation tools that are part of the application *not* your internet browser's **Back** and **Forward** () buttons.



Accessing the Virtual Gateway (continued)

*You are directed to the **Virtual Gateway Login** page.*

Virtual Gateway

Mass.gov

June 25, 2007

HOME CONSUMERS PROVIDERS RESEARCHERS GOVERNMENT

Welcome Virtual Gateway User

Username

Password
(case-sensitive)

[Forgot password?](#)

Virtual Gateway Customer Service
Monday through Friday, 8:30 am to 5 pm

800-421-0938 (Voice)
617-988-3301 (TTY for the deaf and hard of hearing)

5. Enter **Username** and **Password**.
6. Click **Submit**.

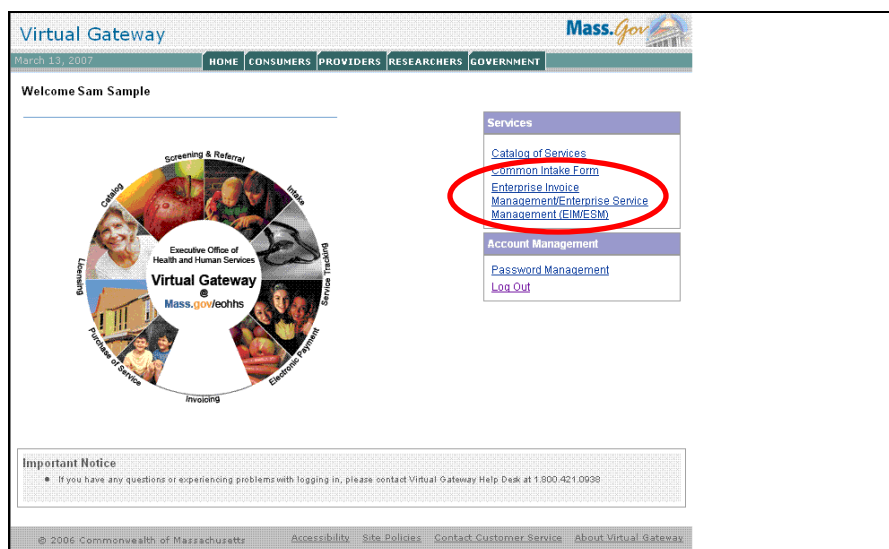
*The **Virtual Gateway Business Services** page displays.*

Note: Security requires that each person have a Virtual Gateway username and password.



Accessing Provider Services

The **Virtual Gateway Business Services** page displays after you have successfully entered your username and password. You can select the service(s) you wish to access from this page. You can call the Virtual Gateway Customer Service if you need any assistance: 1-800-421-0938.



Note: Once you are logged in, you will have access to EIM/ESM.

Password Management

All users must change their password at first login.

After your initial login, you can change your password at any time by clicking on the [Password Management](#) link.

Password policy rules:

- The user will be assigned an ID and temporary password sent through e-mail by the Virtual Gateway Customer Service
- The password must contain between 8 and 12 characters and have at least 1 alpha and 1 numeric character
- Passwords are case-sensitive
- Users will be automatically logged out of the system after 30 minutes of inactivity
- EIM/ESM after 15 minutes of inactivity



Password Management (continued)

Health and Human Services

Mass.gov

June 29, 2005

CONSUMER PROVIDER RESEARCHER GOVERNMENT

Welcome Jill Tr

Virtual Gateway

Change Password

Password should have 8 to 12 characters, and contain at least one alpha and one numeric character.

New Password:

New Password (confirm):

Submit Close

Account Management

[Password Management](#) [Log Out](#)

Important Notice

- The Virtual Gateway will be unavailable for system maintenance on Thursday February 3rd, 2005 from 5:00pm until 9:00pm
- If you have any questions please contact the Virtual Gateway Help Desk at 1.800.421.0938

[Return to the HHS Home page](#)

Important: You will need to disable any pop-up blocker in your browser to allow the change of password screen to appear. Contact your network administrator if you need assistance with this process.

Once you login, you can change your password.

To change your password:

1. Access the Business Services page.
2. Click the [Password Management](#) link.
The Change Password popup window appears.
3. Type your new password twice.
4. Click **Submit**.
5. Click **Close**.



Virtual Gateway Customer Service Information

The Virtual Gateway Customer Service is available to assist with:

- General questions regarding the Virtual Gateway
- Technical questions or system issues
- Questions regarding how to use EIM/ESM
- Password resets

Please be prepared to provide the following:

- Name, organization, phone number, email address
- Module/page/field you were working on (if applicable)
- Description of the issue or error message
- Perceived criticality

You can reach the Virtual Gateway Customer Service at 1-(800)-421-0938 from 8:30 a.m. to 5 p.m. Please leave a voice mail if calling after hours.



Module 2: Introduction to EIM/ESM and EOM

Introduction

The EIM/ESM service provides functionality for a variety of provider and agency users. These functions are presented as modules within EIM/ESM. Users have access to their required modules when logged into EIM/ESM. EOM service allows administrative staff to enter and update staff records.

The EIM/ESM and EOM service is available from 7 a.m. to 7 p.m.

This module discusses the following topics:

- What is EIM/ESM and EOM?
 - EIM/ESM and EOM Overviews
 - Benefits of EIM/ESM and EOM
-

What is EIM/ESM and EOM?

Enterprise Invoice Management/Enterprise Service Management (EIM/ESM) is a web-based billing and service delivery reporting system for Purchase of Service (POS) providers.

Enterprise Invoice Management (EIM) is an EOHHS-wide invoicing application which coordinates billing and reporting across POS programs, agencies, and providers.

Enterprise Service Management (ESM) supports providers contracted through the Department of Public Health (DPH) with a client management and service tracking tool. ESM fully integrates and coordinates delivery and administration of care across DPH programs, bureaus, and providers.

Enterprise Organization Management (EOM) allows for administration of organization and staff information.

This guide focuses on **reports** functionality available in ESM. Additional information about EIM/ESM can be found under the Provider tab of the EOHHS web page: www.mass.gov/eohhs.



EIM Overview

EIM (Enterprise Invoice Management) integrates invoicing and payment across EOHHS agencies.

Invoices:

- Are generated and submitted by providers through EIM
- Are automatically adjudicated within EIM
- Adjudication results can be viewed in EIM

PRC (Payment Request for Commodity):

- Are generated within EIM
 - Can be tracked through EIM
-

ESM Overview

ESM (Enterprise Service Management) enables provider organizations to maintain their client roster, program enrollments, service plans, case management plans, and encounter documentation.

Client Management:

- Provides program-specific electronic applications
- Maintains client information
- Determines eligibility
- Enrolls clients
- Offers configurable assessments

Service Management:

- Generates individual client service plans
- Offers configurable assessments
- Manages authorizations, when required
- Offers service planning and case management

Note: Initially, ESM will be deployed for DPH programs only.

EOM Overview

EOM (Enterprise Organization Management) enables provider and government organizations to maintain their related information such as addresses and identifiers.



Benefits of EIM/ESM and EOM

How does the EIM/ESM service benefit providers?

- **Simplifies** reporting and invoicing for purchased services
- **Enables** providers to track invoices through the adjudication and payment process, providing information about status, adjustments, date of payment, etc.
- **Provides** unprecedented enterprise reporting capabilities to provider organizations as well as agencies

What are the benefits of EIM?

- Provides expedited payment
- Provides real-time payment processing
- Offers access to up-to-date financial data

What are the benefits of ESM?

- Provides access to dynamic data collection and reporting
- Provides online, client-based enrollment
- Enhances referral throughout treatment episode

What are the benefits of EOM?

- Offers visibility into the structure of organizations and the ability to create multiple levels (sub-organizations) when appropriate
- Provides online access for maintaining staff and their associations with one or more organizations



Notes:



Module 3: EIM/ESM Navigation Basics

Introduction

Navigation is simple and consistent throughout each module in EIM/ESM. The topics in this module will help you:

- Understand the modular structure of EIM/ESM
- Navigate through each module
- Search for records
- Identify additional navigational tools

Module Links

When a user logs into EIM/ESM, the **module links** are immediately available at the top of the page.

The screenshot displays the EIM/ESM user interface. At the top, a navigation bar includes links for Home, Clients, Case Management, Billing, Contracts, Report, Help, and Logout. Below this, the current location is shown as 'Steps > Administrator Home'. The main content area includes a 'Welcome bdph' message, an 'Alerts' section with a table showing a message from 01/29/2007, and 'Tasks' and 'Appointments' sections, both indicating 'No Tasks Exist' and 'No Appointments Exist'. At the bottom, there is a 'EIM/ESM USER CERTIFICATION' section with a disclaimer and two sections for 'FOR AGENCY USERS' and 'FOR PROVIDER USERS', each with a bullet point regarding authorization. The bottom of the page features a blue bar with the text 'ALL USERS AGREE AND ACKNOWLEDGE THAT ALL INFORMATION SUBMITTED TO EIM AND ESM IS ACCURATE AND COMPLETE'.

Date	Message
01/29/2007	This environment is for training only!

Displaying 1-1 of 1

Tasks
No Tasks Exist.

Appointments
No Appointments Exist.

EIM/ESM USER CERTIFICATION

By submitting billing or service data by selecting save, release, or authorize, you acknowledge that you are responsible for entries made under your user identification name. If you submit billing or service data through EIM or ESM for processing, you agree that you are certifying under the pains and penalties of perjury that it is your intention to attach an electronic signature approval and date to the EIM or ESM billing or service data, and that either:

FOR AGENCY USERS

- You have been delegated signature authorization by your agency to approve the document (and supporting documentation) as part of your agency's internal control process; OR
- The document you are processing (and any supporting documentation) has received prior written approval by an authorized signatory of the agency, Secretariat, and other required entities, and that a copy of any such written approval is available at the agency referencing the EIM or ESM document number.

FOR PROVIDER USERS

- You have been given authority by your provider organization to approve, reject, modify and submit documents through EIM and ESM.

ALL USERS AGREE AND ACKNOWLEDGE THAT ALL INFORMATION SUBMITTED TO EIM AND ESM IS ACCURATE AND COMPLETE

Each **module link** corresponds with a functional area: the **Clients** module provides access to eligibility and enrollment functions, the **Report** module provides access to reports, etc.

Clicking a module link navigates you to the corresponding features.

The screenshot shows the navigation bar with links for Home, Clients, Case Management, Billing, Contracts, Report, Help, and Logout. The links are highlighted with a red border.



**Additional
Navigational
Tools**

You can use the following features to navigate through EIM/ESM.

Action Buttons

These buttons are used to inform the system to perform a function such as saving data, opening a new page, or performing a search.

**Page
Characteristics**

The look and feel of EIM/ESM is intended to ensure the pages are user-friendly.

The following table contains page characteristics with a graphic example.

Required Fields

These fields must be entered before the system can perform an action such as save new data or perform a calculation. Required fields are identified on each page with a red asterisk (*) to the left of the field name. If required fields are not populated appropriately, an error message is presented to the user.

Service Delivery Summary

Month:	December
Submission Date:	
SDR Type:	Supplemental
* Sort By:	Client Name <input type="button" value="Sort"/>

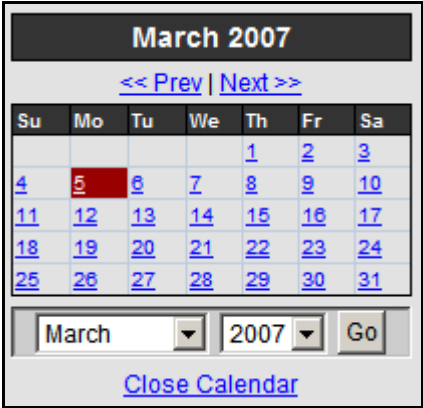
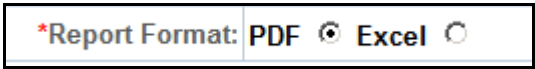
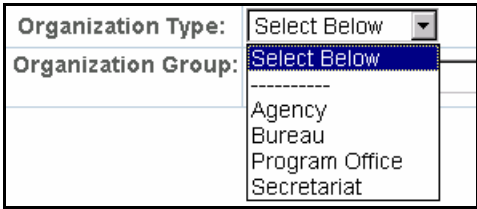
Optional Fields

These are fields where only policy and procedures dictate that the field needs to be populated. The system will allow these fields to remain empty.

*Government: Yes <input checked="" type="radio"/> No <input type="radio"/>	*Organization Type: Secretariat
Status: Active <input checked="" type="radio"/> Inactive <input type="radio"/>	
Comments:	<input type="text"/>



Page Characteristics (continued)

<p>Calendar Buttons</p> <p>These buttons appear to the right of date fields. By clicking the calendar button the current month calendar opens. You can use your mouse to select days in the current month or navigate to other months or years.</p>	
<p>Radio Buttons</p> <p>These buttons allow you to make a selection where you are limited to only one choice. Radio buttons can be selected using the mouse or the space bar.</p>	
<p>Pick Lists</p> <p>These fields allow you to click the arrow and select a single choice from an available list of previously entered options. Or you can type the first letter or number you are looking for and the system automatically reduces the list to the beginning letter or number you type.</p>	



Notes:



Module 4: Reporting

Introduction

Typically, reports are generated by an authorized user who chooses report content and format as part of submitting a reporting request.

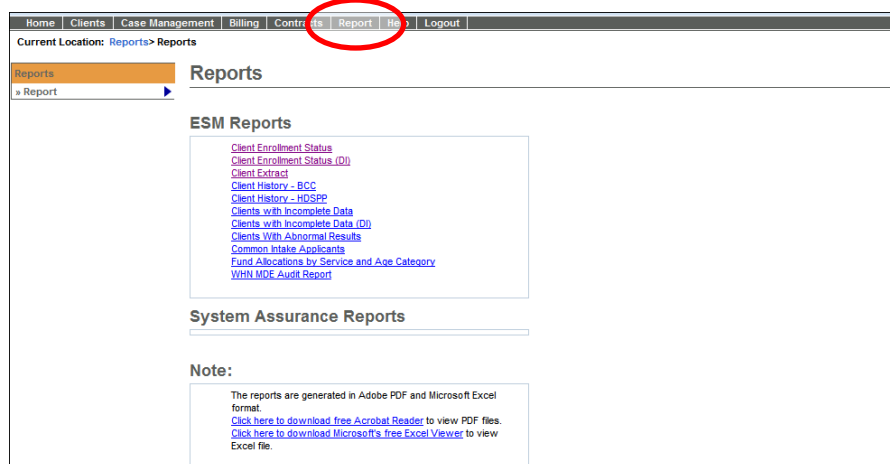
Key Terms

The following terms will help in understanding how reports function:

- **Service Management Reports:**
Reports related to ESM functionality
- **Report Selection Criteria:**
Parameters/filters a provider enters when requesting a report
- **Report Output Format:**
Reports can be created as Excel or PDF files
- **Report Frequency:**
Reports in EIM/ESM are scheduled on-demand

Accessing the Reporting Feature

To access the reporting feature of EIM/ESM: Access the **Reports** module. A list of Service Management reports appear.



Note: Access to reports is based on user security roles. Your page may look slightly different.



**Reports
Catalog**

The table below lists the reports available in EIM/ESM. Depending on your user security role, not all reports listed here may be relevant to the program you are working with.

Report Name	Purpose
Aggregate Diagnosis Report (SBHC)	Provides a listing of the top 50 diagnoses made at a given site in a given period.
Aggregate Enrollment Status Report (SBHC)	Provides a copy of the new unique client enrollments per site per month for the selected year.
Aggregate Service Report (SBHC)	Provides a listing of the top 50 services delivered at a given site in a given period.
Client Extract Report	Provides contact and demographic information for a selected client population for the purpose of contacting the client.
Client Enrollment Status Report	Provides a list of clients enrolled within some specified timeframe. Can be used to identify clients that have been enrolled that have not received services, to confirm enrollments, to identify clients that have disenrolled and referred to another program (activity) and to assess organization capacity usage.
Client Enrollment Status Report - DI (BSAS)	Provides a list of clients enrolled within some specified timeframe. This version of the report without client identification information is to be used by BSAS agency users.
Clients with Abnormal Results	Identifies clients with abnormal test results that require monitoring or follow-up.
Client with Incomplete Data	Provides a list of active clients missing information. The purpose of this report is to provide a summary report of clients where data is missing such as missing Assessments (input parameters might include: Program/Activity and Assessment Name – multi-select).



**Reports
Catalog**
(continued)



Report Name	Purpose
Client With Incomplete Data - DI (BSAS)	Provides a list of active clients that are missing information. This version of the report without client identification information is to be used by BSAS agency users.
Common Intake Applicant Report	Identifies clients that have been processed through common intake. Provides a list of applicants processed through common intake for a specific program.
Client History - BCC	Shows the full clinical history of services received and paid, funding sources, results, diagnosis, and treatment information for selected client/s. This report format will be used with site visit criteria to generate site visit client history as well.
Client History - HDSPP	Shows the full clinical history of services received and paid, funding sources, results, diagnosis, and treatment information for selected client/s. This report format will be used with Site visit criteria to generate site visit client history as well.
Diagnosis Report (SBHC)	Provides a copy of the enrolled individuals associated with a selected diagnosis.
Encounter Status Report (SBHC)	Provides a copy of the unique daily encounters per site for each month of the selected year.
Fund Allocations by Service and Age Category (Fund Allocation Report)	Analyzes fund allocations by service and age categories. The CDC requires monitoring performance against guidelines based on Age and Service Category.
Services Not Associated With a Claim or Have an Error	Provides a list of services that are in draft or ready state that have not been associated with a claim or services that have been rejected.



Entering Report Criteria

Criteria selection tailors report results. By entering criteria, a user can determine the details and grouping of the report data. Criteria include dates, activity, locations, and contract numbers.

To enter criteria and run a report:

1. Access the **Reports** module.
A list of Service Management reports appear.
2. Click the [name of the individual report](#) link.
*A **Report Criteria** page appears.*
***Note:** The **Report Criteria** page will differ depending upon the specific report being requested.*
3. Enter criteria.
4. Select a **Report Format** (*PDF is the default*). Report criteria are not always printed on reports. Users may find it helpful to record criteria manually.
5. Click .
The report opens in a new window.
6. Click **File** from the menu at the top of the page, select **Save As** for *Excel file* or **Save a Copy** for *PDF*.
7. Navigate to the desired location; enter a title in the **File Name** field and click .

Client Enrollment Status (DI) Sample Report

Client Enrollment Status Report BSAS	
*Report Format: PDF <input checked="" type="radio"/> Excel <input type="radio"/>	*Date Type: Enrollment <input type="text"/>
*Period Start Date: 07/01/2007 <input type="text"/>	*Period End Date: 07/31/2007 <input type="text"/>
*Activity: BSAS Treatment Services <input type="text"/>	
*Organization Type: Contracted <input type="text"/> <input type="button" value="Select Organization"/>	
*Organization: DPH Provider 1014 <input type="text"/>	
Services Received? <input type="text"/>	Select Below <input type="text"/>
Federally Paid Service? <input type="text"/>	Select Below <input type="text"/>
Disenrollment Reason:	<div>3 Years of Age Acquired Medicare Part B Acquired insurance Administrative/Non-compliance Assessment Only</div>
<input type="button" value="Run Report"/> <input type="button" value="Clear"/>	



Client Enrollment Status (DI) Sample Report Results

Report Title: Client Enrollment Status Report						Page Number:		1 of 5	
						Report Run Date:		07/16/2007	
						Report Run Time:		03:27:3 PM	
Enrollment Start Date:						07/01/2007		Date Type: Enrollment	
Enrollment End Date:						07/31/2007		Services Received:	
Activity(Program): 24 Hour Residential Services								Federally Paid Service:	
Enrolling Provider: Provider 8								Disenrollment Reason:	
Client Id	Client DOB	Medical Record Number	Enrollment Start	Enrollment End	Disenrollment Reason	Date of First Service	Most Recent Date Service	Agency Amount Paid To Date	Federally Funded Amount Paid to Date
1009001	02/11/65		07/02/07	07/13/07	Completed				
1009002	06/23/66		07/07/07	07/07/07	Enrolled in error				
1009003	05/22/84		07/16/07	07/16/07	Enrolled in error				
1009004	05/07/66		07/15/07	07/15/07	Enrolled in error				
1009005	05/02/82		07/01/07	07/03/07	Drop-out				
1009006	11/19/70		07/01/07	07/01/07	Enrolled in error				
1009007	11/19/70		07/01/07	07/13/07	Drop-out				
1009008	12/03/61		07/01/07	07/01/07	Enrolled in error				
1009009	12/03/61		07/02/07	07/02/07	Enrolled in error				
1009010	12/03/61		07/02/07	07/05/07	Drop-out				
1009011	08/10/87		07/02/07	07/06/07	Completed				
1009012	09/12/79	7702001	07/21/07	07/21/07	Enrolled in error				
1009013	03/19/60	7701001	07/16/07	07/16/07	Enrolled in error				
1009014	03/19/60	7701002	07/18/07	07/18/07	Enrolled in error				
1009015	03/19/60	7701008	07/24/07	07/24/07	Enrolled in error				

**Trouble -
Shooting**

Listed below are some of the most commonly asked questions about running reports in EIM/ESM.

Problem	Possible solutions
Why am I not getting the results I expected?	<ul style="list-style-type: none">• Double-check that criteria filters are correct• Consider user security
Why doesn't this match my legacy reports?	<ul style="list-style-type: none">• Double-check that criteria filters are correct
Why does my computer stall when I try to run certain reports?	<ul style="list-style-type: none">• Check your report parameters (dates, contract numbers etc). It may be the parameters you specified returned no results. Sometimes, when the system is trying to return an 'empty' report, it stalls. This does not happen every time when there are no results returned. If the system is unresponsive after five minutes, close any unresponsive windows.• Reports do not run directly off the EIM/ESM service. They run from a separate database that is regularly refreshed with EIM/ESM information. The time delay for this replication is about 20 minutes, so if you just entered information into EIM/ESM, you would not be able to report on it until about 20 minutes later.
When I alert customer service about reports not running or taking too long to run, what information should I provide?	<ul style="list-style-type: none">• Make a note of the report name and the date and time you attempted to run it.• Provide the input parameters you used (contract number, vendor name, etc.) and how long you waited before the report timed out or you halted your efforts. If an error message appears on the screen, make a note of that as well.



Notes: