PS&R – Order Summary Report

The Provider Statistical & Reimbursement System (PS&R) contains various report features. The following describes how to order the Summary Report which is used in preparing the Medicare cost report.

An approved **PS&R User** can order reports. Access to the PS&R is controlled through the Enterprise Identity Management (EIDM) website. If access is needed, refer to the article, **PS&R - Obtain Access through EIDM**, for instructions.

A. Login to PS&R

Use the following link to login to the PS&R: <u>https://psr-ui.cms.hhs.gov/psr-ui</u>

The **Terms and Conditions** screen will appear (see below). To continue, review and accept the terms and conditions. Select **I Accept.** (Please refer to the arrow below.)

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You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.	
Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.	
By using this information system, you understand and consent to the following: You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.	
Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.	
To continue, you must accept the terms and conditions. If you decline, your login will automatically be cancelled.	
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The **Welcome to CMS Enterprise Portal** screen will appear. Enter your **User ID** and **Password** as established in registering for EIDM (or obtained previously through the Individuals Authorized Access to the CMS Computer Services (IACS) system).

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Select Log In.

B. Order Summary Report

After logging in, the **Welcome to The Provider Statistical and Reimbursement System** screen will appear. In the banner line at the top of the screen – select **Request Report.**



On the next screen, select Request Summary.

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The Summary Report Request screen will appear. Perform the following steps to complete the request.

1. Select Provider(s)

Select the provider number/name and click >> button to select the provider. Select **Continue** at the bottom of the screen.

2. Select Report(s)

Select the first option – **By Report Type** by clicking the round button. "All" will be displayed on the next line. Scroll to the end of the screen and select all reports that start with **HHA** and move them to the next box using the arrows >> between the boxes. When done select **Continue.**

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

Enter the starting date period and select apply. Four periods may be listed below. For one year only, exclude the other periods by clicking the box beside **Exclude**. If no periods are showed then enter the desired period under Period 1. When done select **Apply**

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

The default setting is all paid dates and is typically used. If different dates are desired, choose those below. Scroll down to the end of the screen and select **Continue**.

5. Select Report Format

Select the PDF and CVS option, then Select **Continue**.

6. Confirm Report Request

This presents information on the request. Scroll down to the end of the screen and select **Submit** to complete the request (or select **Back** to modify).

7. **Note**: The PS&R System may take a few minutes to a few hours to process the report. The next section will explain how to obtain the completed report.

C. Print or Save - Summary Report

To obtain the completed report, Select Report In-box in the banner at top of the screen.



- The Status column indicates if the request is Queued, Processing or Complete.
 - o If status is **Queued** the reporting is waiting to process, you need to wait or log in again later.
 - If status is **Processing** the report should be complete in a few minutes.
 - o If status is **Complete** the report is available.
- Once status is **Complete**, the **PDF** or **CSV** column contains the requested file (refer to the following screen)

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- o Click on the item in the **PDF or CSV** column to open the files
- o After opening the files save the files containing the report to your desktop.

Send both files (PDF and CVS) by e-mail to: costreportcpa@gmail.com so we can start working on your cost report.

Accessing the System

If you do not have a user ID and password to access CMS Enterprise Portal, you must do a new registration, type the following URL into the address bar: https://portal.cms.gov/wps/portal/unauthportal/home/ and select New User Registration.

