SECTION 700

REPORTS

SECTION 700 INDEX

SECTION 700: REPORTS

701: <u>Introduction</u>

The following is a listing of the reports you can generate from the **Reports** tab:

$ Aggregate Service Report
$ Bulk Demographic Report
$ By Provider, By Service
$ Client List
$ Client List - No Demographics
$ Custom Reporting Tool
$ Mailing Label Export
$ Prior Approval Report
$ Reservation List
$ Service Description Report
$ View saved Reports

702: <u>View Saved Reports</u>

If anyone in your agency saved any ClientTracker reports, this option will allow the reports to be reviewed. In order to review saved reports, complete the following steps:

1.   In ClientTracker, click on the **Reports** tab.

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click on <u>**View Saved Reports**</u>.

3.   The **Saved Reports** page will appear.   The following content boxes will be displayed:

   My Saved Reports - If you saved any ClientTracker reports and chose the reports to be Private, then you only have the rights to view those reports.

   Public Reports - If anyone in your agency saved any ClientTracker reports and chose the reports not to be Private, anyone who has ClientTracker rights in your agency will have access to those reports.

7-1

Updated: 9/2009

703: <u>Aggregate Service Report</u>

This report is based on provider, site, service offering, and quarter/year selections. By viewing the **Aggregate Service Report** you can determine the number of units displayed for each month for each service in a particular quarter. The quarter/year selection corresponds to the fiscal year time frame in which 1st quarter is Oct/Nov/Dec of the ***previous year selected***. <u>All</u> service providers should review this report on a monthly/quarterly basis.

1.   In ClientTracker, click on the **Reports** tab

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Aggregate Service Report** and click the **Go!** button.

3.   The **Build Aggregate Service Report** page will appear. In the **Service Report Parameters** dialogue box, choose the parameters (**Provider**, **Service**, **Site**, and **Quarter/Year**) for the report you want to view.

4.   Click the **Go!** button.

5.   The **Aggregate Service** report will appear. This report will show the number of service units entered into ClientTracker by the provider for a particular quarter. **Month 1** - is the 1st month of the quarter, **Month 2** - is the 2nd month of the quarter, and **Month 3** - is the last month of the quarter.

703.1:   <u>Save this Report</u>

In order to save this report, complete the following steps:

1.   At the bottom of the report page, click on **<u>Save this Report</u>**.

2.   The **Save Report** page will appear.   In the **Report Information** dialogue box, complete the following information:

Report Title: - Give the report a filename.

Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker will be able to view the saved report.

704: <u>Bulk Demographic Report</u>

This report is based on provider, site, service offering, county, and fiscal year. The services that would review this report are the following:

SHAP
> SHAP Information & Assistance (S12)
> Community Events (S16)
> Education & Training (S19)

Legal Services
> Legal Assistance
> Caregiver Legal Fund
> GRG Legal Fund

1.   In ClientTracker, click on the **Reports** tab.

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Bulk Demographic Report** and click the **Go!** button.

3.   The **Build Bulk Demographic Report** page will appear. In the **Select Report Parameters** dialogue box, choose the parameters (**Provider**, **Service**, **Site**, **Fiscal Year**, and **Number of Years**) for the report you want to view.

4.   Click the **Go!** button.

5.   The **Bulk Demographic** report will appear. (Before printing this report, change the page layout to <u>landscape</u>.)

704.1:   <u>Save this Report</u>

In order to save this report, complete the following steps:

1.   At the bottom of the report page, click on **<u>Save this Report</u>**.

2.   The **Save Report** page will appear. In the **Report Information** dialogue box, complete the following information:
     Report Title: - Give the report a filename.

     Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker in your agency or Area Agency staff will be able to view the saved report.

705: <u>By Provider, By Service</u>

This report is based on provider, site, service offering, county, and fiscal year. The services that would use this report on a monthly/quarterly basis are the following:

Assisted Transportation
Caregiver Advisory Services
      Caregiver Advisory - Caregiver
      Caregiver Advisory - GRG
SHAP
      SHAP Information & Assistance
      SHAP counseling
      SHAP Outreach visits
      Low Income Subsidy form
      Medicare Savings Program (MIPPA)
      Medicare Part D
      CB/IL Cares Rx applications
Counseling
Home Health
Nutrition
      Individual Needs Assessment
      Home Delivered Meals
      Congregate Meals
Medication Management
Money Management
MPSC
Respite Services
Senior Information Services
Transportation
Gap Filling (regular, caregiver and CCC)

1.   In ClientTracker, click on the **Reports** tab.

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **By Provider, By Service** and click the **Go!** button.

3.   The **Build By Provider, By Service** page will appear. In the **Select Report Parameters** dialogue box, choose the parameters (**Provider**, **Service**, **Site**, **Fiscal Year**, and **Number of Years**) for the report you want to view.

4.   Click the **Go!** button.

5.   The **By Provider, By Service** report will appear. (Before printing this report, change the page layout to <u>landscape</u>.)

705.1:   <u>Save this Report</u>

In order to save this report, complete the following steps:

1.   At the bottom of the report page, click on <u>**Save this Report**</u>.

2.   The **Save Report** page will appear. In the **Report Information** dialogue box, complete the following information:

Report Title: - Give the report a filename.

Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker will be able to view the saved report.

705.2:   <u>Confirm as Final Numbers</u>

This function will send an e-mail to your agency's assigned Community-Grants Specialist indicating the figures in this report are accurate and complete. This function also locks out your agency for the remainder of that quarter.

706: <u>Client List</u>

This report is based on site, service offering, county, and date range selections. The date range selection applies to the date that a client was authorized to receive a service. All service providers, except providers listed under **Bulk Demographic Report**, should review this report on a monthly/quarterly basis to ensure client data was entered correctly.

1.   In ClientTracker, click on the **Reports** tab.

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Client List** and click the **Go!** button.

3.   The **Build Client List** page will appear. In the **Select Report Parameters** dialogue box, choose the parameters (**Provider**, **Service**, **Site**, **County**, **Authorization Start Date**, **Authorization End Date**) for the report you want to view. For the purposes of this report, ACounty@ refers to the client's county of residence.

4.   Click the **Go!** button.

5.   The **Client List** report will appear.

706.1:   <u>Save this Report</u>

In order to save this report, complete the following steps:

1.   At the bottom of the report page, click on <u>**Save this Report**</u>.

2.   The **Save Report** page will appear. In the **Report Information** dialogue box, complete the following information:

   Report Title: - Give the report a filename.

   Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker will be able to view the saved report.

707: <u>Client List - No Demographics</u>

This report is based on site, service offering, county, and date range selections. The date range selection applies to the date that a client was authorized to receive a service. All service providers, except providers listed under **Bulk Demographic Report**, should review this report on a monthly/quarterly basis to ensure client data was entered correctly.

1.   In ClientTracker, click on the **Reports** tab.

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Client List - No Demographics** and click the **Go!** button.

3.   The **Build Client List - No Demographics** page will appear. In the **Select Report Parameters** dialogue box, choose the parameters (**Provider**, **Service**, **Site**, **County**, **Authorization Start Date**, **Authorization End Date**) for the report you want to view. For the purposes of this report, ACounty@ refers to the client's county of residence.

4.   Click the **Go!** button.

5.   The **Client List - No Demographics** report will appear.

707.1:   <u>Save this Report</u>

In order to save this report, complete the following steps:

1.   At the bottom of the report page, click on <u>**Save this Report**</u>.

2.   The **Save Report** page will appear. In the **Report Information** dialogue box, complete the following information:

Report Title: - Give the report a filename.

Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker will be able to view the saved report.

708: <u>Custom Reporting Tool</u>

This report is used to generate service or assessment reports with a wide selection of parameters. All services, except services listed under **Bulk Demographic Report**, can utilize this function.

1.   In ClientTracker, click on the **Reports** tab.

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Custom Reporting Tool** and click the **Go!** button.

3.   The **Custom Reporting Tool** page will appear. In the **Select where clients should come from - Step 1 of 5** dialogue box, choose the following parameters:

Sites: The default is **All Sites**. You can choose one site by clicking on that site or multiple sites can be selected by holding down the CTRL key while clicking on each site you want to include in the report.

Counties: The default is **All Counties**. The user can choose one county by clicking on that county or multiple counties can be selected by holding down the CTRL key while clicking on each site you want to include in the report. County refers to the client's county of residence.

Townships: Township names will only appear in this box if the user has entered township information through the **Provider Settings** process. (If

you would like to add Townships in ClientTracker, please see **Section 800 - Provider Settings**.) If townships have been entered, the user can

choose one township by clicking on that township or multiple townships can be selected by holding down the CTRL key while clicking on each township you want included in the report.

Zip Codes: The default is **All Zip Codes**. If you choose a specific county(ies) and want to choose a specific zip code (or multiple zip codes within the county), click on the green link **Load Zip Codes**. Only the zip codes for that county(ies) will be displayed.

4.   When you have selected all of the parameters in **Step 1**, click on the **Save and Continue** button.

5.   The **Select what type and when services were provided - Step 2 of 5** dialogue box will appear.   In **Step 2**, choose the following parameters:

Authorization Dates: If you want dates other than the ones displayed, change the **Start date** and **Stop date** by using the drop down arrow next to the month, day and year box.

Registration Dates: Registration dates reflect when the provider first entered the client into ClientTracker. The default is to **Show all clients**. To create a report for clients entered into the system during a specific time frame, click in the circle next to **Limit to clients with registration dates between** and change the **Start date** and **Stop date** by using the drop down arrow next to the month, day and year box. You also have the option of changing the **and no Registration before:** date by using the drop down arrow next to the month, day and year box.

Services: The default is **All services**. The user can choose one service by clicking on the service or multiple services can be selected by holding down the CTRL key while clicking on each service you want included in the report.

6.   When you have selected all of the parameters in **Step 2**, click on the **Save and Continue** button.

7.   The **Select demographics - Step 3 of 5** dialogue box will appear. In **Step 3**, choose the following parameters:

Date of Birth: The default is **Show all Clients**. To only view clients in specific age ranges (i.e. 75+), click in the circle next to **Limiting to clients with birth dates between** and change the **Start date** and **Stop date** by using the drop down arrow next to the month, day and year box.

ADL Assessment Scores: The default is **All Clients**. To only view clients within specific assessment ranges, click in the circle next to **Only**

Clients with Assessments and select the assessment ranges by using the drop down arrow next to the number boxes.

IADL Assessment Scores: The default is **All Clients**. To only view clients within specific assessment ranges, click in the circle next to **Only Clients with Assessments** and select the assessment ranges by using the drop down arrow next to the number boxes.

Nutrition Risk Assessment Scores: The default is **All Clients**. To only view clients within specific assessment ranges, click in the circle next to **Only Clients with Assessments** and select the assessment ranges by using the drop down arrow next to the number boxes.

Demographic Categories (**Gender, Ethnicity, Race, Lives Alone, Limited English Speaking, Status, Eligibility, Low Income, Rural (<2500 residents), and CCP Client**): Clicking in the box next to a demographic category will restrict the report to displaying only those demographics. If you do not select any of the demographic categories, all demographics will be displayed on the report.

8.   When you have selected all of the parameters in **Step 3**, click on the **Save and Continue** button.

9.   The **Select information to include in the report - Step 4 of 5** dialogue box will appear. In **Step 4**, choose the following parameters:

    Always included: All reports include client last name and first name. The report date and total number of clients will always be in the header at the beginning of the report.

    Include Demographics: The default is to view all client demographics. If you do not want to view client demographics, click in the circle next to the No.

    Also Include: Click in the box next to each item you want to include in your report. You must select **Address** if you want to view township designations.

10.   When you have selected all of the parameters in **Step 4**, click on the **Save and Continue** button.

11.   The **Order the report by - Step 5 of 5** dialogue box will appear. In **Step 5**, select the parameter(s) you want to use in determining the order in

which the report is displayed. NOTE: Records with no data for the chosen parameter will be listed first in the report.

12. When you have selected all of the parameters in **Step 5**, click on the **Search** button.

13. The **Custom Client Report** page will appear. There are two (2) links at the top of the report which allow you to:

   a. **Build a New Report** - this takes you back to **Step 1**. NOTE: this link is also available on all of the selection screens for each step.

   b. **Save this Report** - this allows you to save the report so you don't have to build the report again. In order to save this report, complete the following steps:

      1. At the top of the report page, click on **Save this Report**.

      2. The **Save Report** page will appear. *(Attachment A8)* In the **Report Information** dialogue box, complete the following information:
      Report Title: - Give the report a filename.

      Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker will be able to view the saved report.

709: <u>Mailing Label Export</u>

This option is used to create a comma-delimited list of clients. This list can be imported into a word processing program and used to print mailing labels. All services, except services listed under **Bulk Demographic Report**, can utilize this function.

1. In ClientTracker, click on the **Reports** tab.

2. The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Mailing Label Export** and click the **Go!** button.

3. The **Build Mailing Labels** page will appear. In the **Select Parameters** dialogue box, choose the parameters (**Provider**, **Service, Site**, **County**,

and **Fiscal Year**) to create your mailing labels. ACounty refers to the client's county of residence.

4.   Click on the **Go!** button.

5.   The **Download Mailing Labels** page will appear. In the **Download Generated CSV File** dialogue box, if the parameter information is correct, right click on the link that reads **Right Click and choose Save Target As... to Download Now!**.

6.   Click on **Save Target As**. You will then be given an option of where you would like to save this file. Remember to click on **Save**.

7.   Retrieve this file by using the mail merge program in your word processor. Below are instructions on how to create Mailing Labels in WordPerfect, Microsoft Word XP, and Microsoft Word 2000.

709.1:   To Create Mailing Labels in WordPerfect

1.   In WordPerfect, click on the **Insert** function, select **Spreadsheet/Database**, and select **Import**.

2.   The **Import Data** window appears. In the **Data type:** list box, choose **ASCII Delimited Text.**

3.   In the **Import as:** list box, choose **Merge Data File. (**Please note: In the **Import as:** list box, you can also choose **Table.** If you want to automatically size table columns, enable the Size table columns to fit the data after import check box.)

4.   In the **Filename:** box, choose a path and filename of the exported file or browse to locate the exported file.

5.   You can either leave the default choices selected or choose options for delimiters and characters.

709.2:   To Create Mailing Labels in Microsoft Word XP

1.   In Word, click on the **Tools** function, select **Letters and Mailings,** and select **Mail Merge Wizard.**

2.   A **Mail Merge** instruction page will appear on the right of your document. It will guide you through each of the steps.

3.   **Step 1: Select document type** - Select the type of document you wish to create. For this process, select **Labels**. Then click **Next:**

Starting document at the bottom of the instruction page to continue to **Step 2**.

4.   **Step 2:** **Select starting document** - Select **Change the document layout** and click **Next: Select recipients** at the bottom of the instruction page.

5.   The **Labels Options** window appears asking you to select the type of label you wish to prepare. Select the **Label Products** and **Product Number** to match the labels you will be using. Click **Ok.** If it does not take you to **Step 3**, click **Next: Select recipients** at the bottom of the instruction page to continue to **Step 3**.

6.   **Step 3: Select Recipients** - Under the **Use an existing list**, select **Use an existing list** and click **Browse...**

7.   The **Select Data Source** window will appear. Select the file you wish to use as your data source. Click on the drop down menu for **File of Types** and choose **Text Files** (*.txt, *.prb, *.csv, and *.tab).

8.   Browse to the file you downloaded from ClientTracker. Click **Open** and allow a few moments to load the ClientTracker data. Click **Ok** whenever the data has been loaded.

9.   Click **Next: Arrange your labels** at the bottom of the instruction page to continue to **Step 4**.

10.   **Step 4: Arrange your labels** - Click on **Address block....**

11.   **Insert Address block** window appears and click on **Match Fields** button located at the left hand corner of the **Insert Address block** window.

12.   **Match Fields** window appears, displaying a singe client's information. Map each field to the appropriate data displayed. Then click **Ok** and click **Ok** on the **Insert Address block** window.

13.   You should then notice **<<Address Block>>** displayed in the first label in your document. In order to copy this function to all of the labels, click on the **Update all labels** button under **Replicate Labels** section.

14.   Click on **Next: Preview your labels** at the bottom of the instructions page to continue to **Step 5**.

15.   **Step 5: Preview your labels** - If everything is correct in your document, click on **Next: Complete the Merge** at the bottom of the instructions page to continue to **Step 6.**

16.   **Step 6: Complete the Merge -** You have the option to **Print** or **Edit** individual labels.

709.3:   To Create Mailing Labels in Microsoft Word 2000

1.   In Word, click on the **Tools** function, select **Mail Merge.**

2.   Click on **Document Type** and click **Mailing Labels.**

3.   **Open Data Source** dialogue box appears. Select **Merge information from another type of file.**

4.   Browse to the folder where you saved the exported file from ClientTracker and click on the file name. Click **Open**.

5.   A box will appear asking **ADo you want to use entries in the 1st row of your data as field names?** Click **No**.

6.   A box will appear titled **Select Separator Character**. Click in the box next to the Comma. Click **Ok**.

7.   A box will appear saying **AWord needs to set up your merge document.** Click **Ok**.

8.   **Mail Merge Helper** appears. Under **#1 - Mail Document**, click **Setup**, choose label and click **Ok**.

9.   Click **Insert Merge Field**. Click on F1 (field F1 is the first name field) and press the space bar.

10.   Click **Insert Merge Field.** Click on F2 (field F2 is the last name field) and press **Enter**.

11.   Click **Insert Merge Field.** Click on F3 (field F3 is the 1st address field, field F4 is the 2nd address field - which you probably won't use) and press **Enter**.

12.   Click **Insert Merge Field.** Click on F5 (field F5 is the city field) and press the space bar.

13.   Click **Insert Merge Field.** Click on F6 (field F6 is the state field) and press the space bar.

14.   Click **Insert Merge Field.** Click on F7 (field F7 is the zip code field) and press **Ok**.

15.   Go to **#3 - Merge the data with the document** and click **Merge. Merge to new document** is a default. Click on **Merge.**

710: <u>Prior Approval Report</u>

This report is based on provider, service offering, fiscal services, funds, county, and date range. The date range selection applies to the date the client was approved for an authorized service or paid amounts. This report can be utilized by service providers who administer GAP Filling and/or Respite Services.

1.   In ClientTracker, click on the **Reports** tab.

2.   The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Prior Approval Report** and click the **Go!** button.

3.   The **Funds Approval** page will appear. In the **Build Query Constraints** dialogue box, choose the following parameters:

       Provider: You will only be able to view information for your agency.

       Service: All the services that are authorized for your agency will be listed. Select which service you wish to review by using the drop down arrow in the **Service:** .

       Fiscal Service: Select which fiscal service you wish to review by using the drop down arrow next to: (If you wish to review Respite authorizations, select **All Fiscal Services**.)

       All Fiscal Services
       Cooling Equipment
       Dental Assistance
       Eyeglasses/Hearing Aids
       Handicapped Access Equipment
       Heating Equipment
       Medication
       Not Applicable
       Other - Miscellaneous
       Other Equipment
       Other Repairs

Fund: Select which funding source you wish to review by using the drop down arrow next to:

All Funds
Caregiver/GRG GAP Filling
GAP Filling
GRG under 60 GAP
Respite
CCC Gap Filling

Approval Start Date: and **Approval End Date:** Select the dates you want to review authorizations for by using the drop down arrow next to the month, day and year box.

4.   Click on **Go!** button.

5.   The **Funds Approval** page will appear. This report will show the following:

Client Name
Initials of the Area Agency Specialist who approved the request
Approval Date
Brief Comments from Specialist
DOB (Date of Birth)
County of Residence
Provider
CCU
Service Name
GAP Filling Service
Amount Approved
Amount Paid

6.   In order to print this report, you need to change the page format to landscape.

710.1:   <u>Save this Report</u>

In order to save this report, complete the following steps:

1.   At the bottom of the report page, click on **<u>Save this Report</u>**.

2.   The **Save Report** page will appear. In the **Report Information** dialogue box, complete the following information:

Report Title: - Give the report a filename.

Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker will be able to view the saved report.

711: <u>Reservation List</u>

This report is based on site, service offering, county, and month. You can use this list to indicate dates during the month when a client has used a service. All services, except services listed under **Bulk Demographic Report**, can utilize this report.

1. In ClientTracker, click on the **Reports** tab.

2. The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Reservation List** and click the **Go!** button.

3. The **Build Reservation List** page will appear. In the **Select Report Parameters** dialogue box, choose the parameters (**Provider**, **Service**, **Site**, **County**, **Month**, and **Fiscal Year**) to create your reservation list.

4. Click on the **Go!** button.

5. The **Service Recording Form** page will appear. The report will show client names in alphabetical order down the left side of the page. Remember that only the clients that have been authorized in ClientTracker to receive this service will appear in this report.

6. In order to print this report, you need to change the page format to landscape.

712: <u>Service Description Report</u>

This report lists all services that are available in ClientTracker and their NAPIS ID code. This report also indicates how a unit of service is reported for each of those services listed.

1. In ClientTracker, click on the **Reports** tab.

2. The **Reports** page will appear. In the **Choose Delivery Method** dialogue box, click in the circle next to **Service Description Report** and click the **Go!** button.

3. The **Service Description Report** will appear. The report will give you the following information:

NAPIS ID - This is the NAPIS ID Code which has been assigned to that particular service.

Service Name - This will list **all** of the services that have been entered into ClientTracker by the Area Agency and services added to ClientTracker by other service providers.

Unit - This describes how a unit of service is reported for each of the services listed.

712.1:   Save this Report

In order to save this report, complete the following steps:

1.   At the bottom of the report page, click on **Save this Report**.

2.   The **Save Report** page will appear. In the **Report Information** dialogue box, complete the following information:

Report Title: - Give the report a filename.

Is the Report Private: - Select Yes or No. If you select **Yes**, then the person who is saving the report will be the only person who will be able to view the saved report. If you select **No**, then anyone who is able to access ClientTracker will be able to view the saved report.