Report Maker - General

Reports may be edited, created from scratch, or an existing report may be copied, and changes can be made. To create a report from scratch, a user must go into the Report Maker screen and add fields. The fields are then defined and saved. The Report Maker uses visual editing so the user will see the format of how the report looks. There are several types of fields. Each field type pulls data in a unique manner.

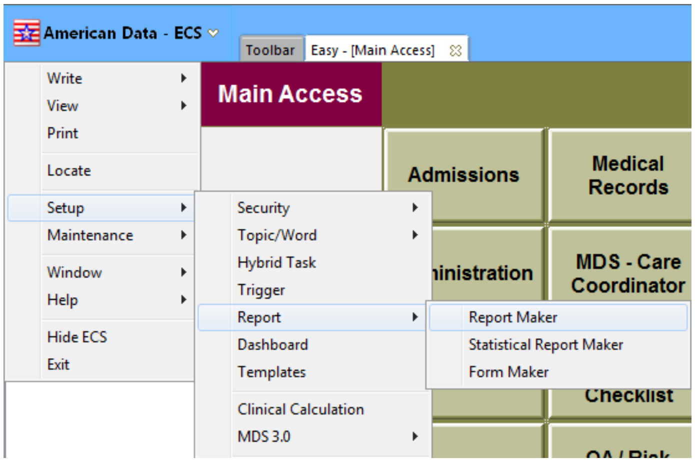
User Group Rights for Report Maker

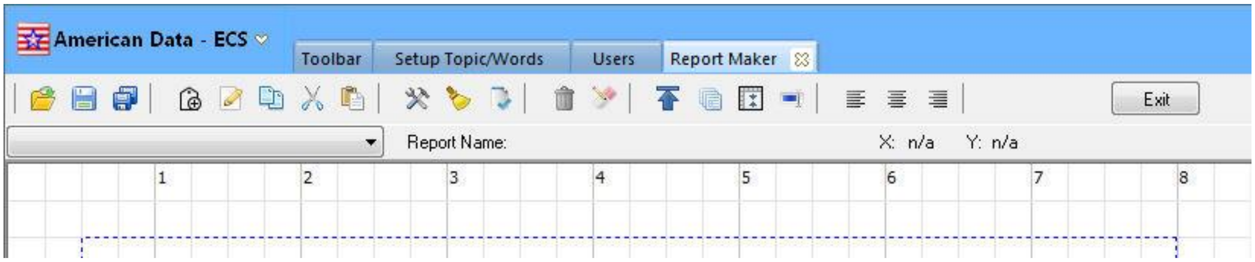
Setting up and editing reports is a User Group right that must be given to users. By default, most user groups do NOT have rights to the setup of Report Maker, unless they are in a system supervisor group.

1. Click American Data – ECS and follow the path Setup > Security > User Group.
2. Right-click on a user group and select Properties.
3. On the Rights tab, click the + next to Setup, click the + next to Report, and put a green checkmark in the Report Maker checkbox.

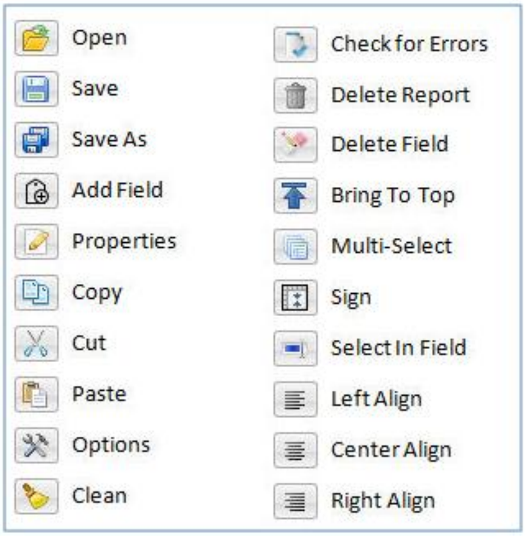
Accessing Report Maker

Click American Data - ECS and follow the path Setup > Report > Report Maker.





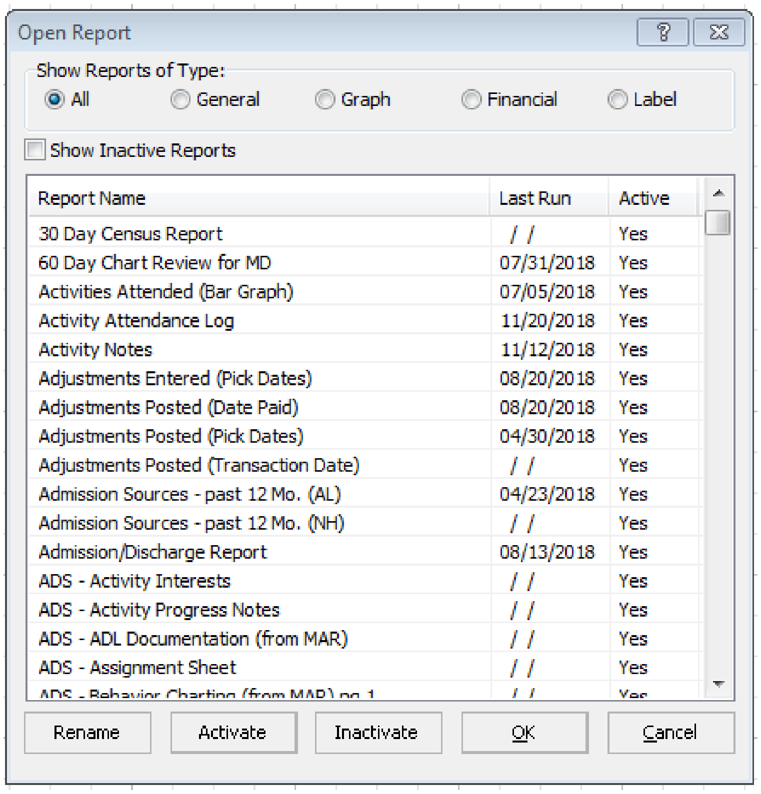
Report Icon Key



Open Reports

Reports may be opened and altered in order to add new fields, delete, move, or change existing fields.

1. Click **American Data - ECS** and follow the path **Setup > Report > Report Maker.**
2. Click the **Open** icon .
3. Select the report to open.
4. Click **OK**.



Reports may be filtered by type. After clicking on the **Open Reports** icon, the report selection screen appears. At the top of this screen are five choices: All, General, Graph, Financial, and Label. Selecting one of these choices will narrow down the reports listed.

Open Report Options

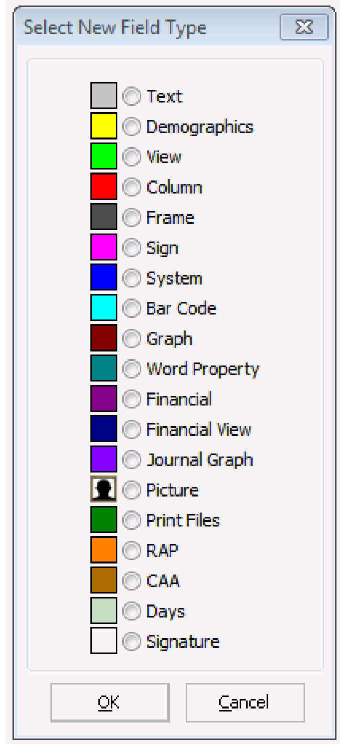
A user can see when a report that has been created was last run and can choose to mark it as “inactive,” which will narrow down the report selection list for the end users selecting and running reports.

1. To inactivate a report, click the **Open** icon .
2. Select a report on the list and click on Inactivate.

3. To activate an inactive report, select the report on the list and click on Activate.

Select the Type of Field

Information documented in the record is available to pull to reports. How the information appears on the report depends on two things. One is how it was entered into the system; reports recognize many of the properties words have. For example, question words are used as delimiters in some fields. The second thing that affects how information appears on reports is what fields are used to pull the information and which options are selected within that field. Different fields are used to pull different types of information to reports.



Field	Description
Text	Pulls text to the report. Text fields are the most basic fields in Report Maker. This field allows users to put labels on reports. These fields are often used as titles to other fields. The text in this field remains constant, that is it appears the same on reports for all clients.
Demographics	Pulls client demographic information to the report. Demographic fields pull information from the client record that was entered via the ID icon (or the Demographics screen). These fields will pull information for Clients, Providers, and Vendors. Demographic data includes name, age, birth date, record number, client number, gender, status, Medicaid, social security number, Medicare number, SSI, location, facility, floor, unit, assign, service.
View	Pulls data entered the chart. The View field pulls information from the client record that was entered via a documenting screen. A single report may contain several view fields of varying sizes. A View field may pull a lot of information (e.g., all of nursing notes) or one single piece of information (e.g., a room number).
Column	Pulls client demographic data and information documented in the chart.

	Column Fields are unique because they can pull demographic information, charting, calendar and formula-based items, and this type of field can be set to export data into an Excel workbook.
Frame	Frame fields can add character to your reports. These fields may be used to created frames, grids, or blocks and can even include labels.
System	Pulls computer or settings information to the report. System fields pull computer data to reports. Often it is helpful to know when a report was printed, for which period a report was generated, or even who generated the report. System data includes date, time, time period, page number, previous month/year, current month/year, next month/year, user's full name and user's initials. Other system options are pulled from system settings (American Data - ECS > Setup > Settings > System). These options include: ID #, Federal #, State # and NPI. The System tab defines the field.
Bar Code	Allows printing of bar codes for clients.
Graph	Pulls data entered the chart. Graph fields are formatted to illustrate two-dimensional and three-dimensional line, bar and pie graphs. Under report Options the report type must be set to Graph for printing graphs. The Graph tab defines the field. Graph reports can also contain equations to calculate and track various rates and totals.
Word Property	Pulls word short name, long name, and values to the report. This is often used for word setup. The Word Property tab defines the field.
Picture	Pulls picture files to a report. This is often utilized for adding facility logos to reports or even pulling in a scanned image of a report the facility is using that they wish to build into ECS, such as an admission packet or a state form. Other report fields can be placed on top of picture fields.
Print Files	Prints attachments from ECS. To print these attachments, you must have Adobe reader and a default printer established. This field is simply a holder so ECS knows to find the file and print it. The attachment prints on its own paper (i.e., when you add the field to the report, the attachment does not print on this report).

CAA	Pulls information from the CAA screens.
Days	This creates a field that can count calendar-based items between a designated starting and ending time. For example, this field can create an Average Length of Stay report for your SNF and AL that will count a stay from Admit/Readmit through Discharge.
Signature	This field adds a Signature area to allow electronic signatures on admissions paperwork, physician order sheets, etc.

Add Fields to Reports

Fields may be added to existing and new reports. For more detailed information on the different fields see Types of Fields and the appropriate screen descriptions.

1. Click **American Data - ECS** and follow the path **Setup > Report > Report Maker.**
2. Click the **Add Field** icon . A field selection box appears.
3. Select the appropriate field type.
4. Click **OK.**
    - The Field Properties box appears.
    - All fields have the General Tab.
5. Make the appropriate changes to the General Tab. This tab typically controls fonts and sizing for the entire report.
6. If the field has a Look tab, make desired selections. Selections in this tab define various cosmetic choices used to make the form pleasing to the eye. The setups in this tab do not change the content of the report.
7. Select the field specific tab and make the desired changes.
8. Click **OK** when finished making selections and **Close**.
9. Move the field to the desired position.
10. Size the field to appropriate dimensions. To size the field left click and hold while pointing to the lower right corner of the field (there is a small box on the corner). Drag the lower right corner of the field to the desired size. Any of the boxes appearing on the outline of the field may be used for sizing.
    - Text fields, Demographics fields, and System fields should not be manually sized. These fields automatically adjust when previewing/printing the report.
    - Column, Sign and Word Properties fields should not have the width manually changed. The width of these columns is determined by the width designated for each column.
11. Save the report by selecting the **Save As** or the **Save** icon.

Move Fields on Reports

When new fields are created or copied, they are in the upper left corner of the screen. The fields are moved to the desired position in the report one of two different ways. If the user knows the x and y coordinates of the desired location these may be entered the field properties, or the user may drag the field to the desired position. After the field is created or copied follow the steps listed below.

Move Fields by Defining X and Y Coordinates

1. When in field properties select the General tab.
2. Define the X coordinate of the field in the Location/Left area.
3. Define the Y coordinate of the field in the Location/Top area.
4. Click **OK** to save the changes.

Move Fields by Dragging

1. Left click and hold on the field that is to be moved.
2. While holding the left-click move the field to the desired position. Release the left-click when done moving the field.

Move or Stretch Fields by Using the Keyboard

1. Left click on the field that is to be moved or stretched.
2. Hold down the Shift key and use the arrows on the keyboard to stretch a field to make it bigger or smaller.
3. Hold down the Ctrl key and use the arrows on the keyboard to move a field into the desired place. Using the keyboard option helps with more precise accuracy than using a mouse.

Save Reports

Reports should be saved often. Just like word documents in word processing when the computer crashes the unsaved data is lost. Reports may be used as templates to other reports by using the Save As feature. American Data encourages this time saving process for creating new reports.

1. Select the **Save Reports** icon .
2. Name the report and click **OK**.
3. Select the desired facility and click **OK**.
4. Select the desired user groups and click **OK**.

The report maker runs an error check during the save process. If errors are found, click **Yes** to see the results and fix the issue. When a report has errors the user encounters problems with printing and viewing the report.

Use the Save As Feature

1. Open a report that is to be saved as a copy. (Select the **Open** icon , select the report, and click **OK**.)
2. Select the **Save Reports** icon .
3. Type in a new unique name for the report and click **OK**.

4. Select the desired facility(s) and click **OK**.
5. Select the desired user groups and click **OK**.
6. Make changes to the report and click the **Save Reports** icon to save the changes.

Delete Reports and Fields

Reports may be deleted from the system. Once a report is deleted it is no longer available for printing. If a report is deleted from the system, the only way it may be "brought back" is by re-creating the report from scratch. ECS has a wealth of reports in the system at the time of purchase.

Delete Reports

1. Click **American Data - ECS** and follow the path **Setup > Report > Report Maker.**
2. Select the **Open Report** icon.
3. Select the report(s) to be deleted.
4. Click **Delete**.
5. Click **Yes**.

Delete Fields

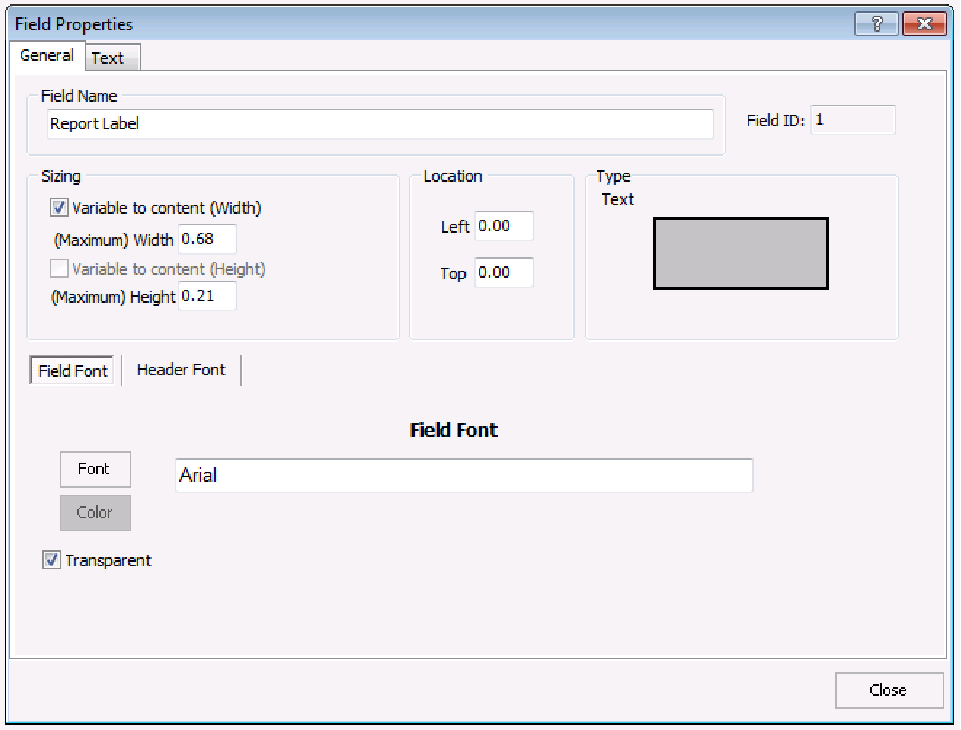
Individual fields may be removed from reports. Once a field is deleted the only way to "bring it back" is to re-create the field.

1. When in the report, highlight the field that is to be deleted.
2. Click the **Delete Field** icon or simply hit Delete on the keyboard.

Multiple fields may be deleted by selecting more than one field using the **Multi-Select** icon then clicking the **Delete Field** icon (or pressing the Delete key).

Setup Instructions

General Tab



Field Name: Words typed here label the field in report maker (helpful in cases of multiple fields) or they can serve as headings for variable height fields.

Sizing: Used to control the size of a specific field.

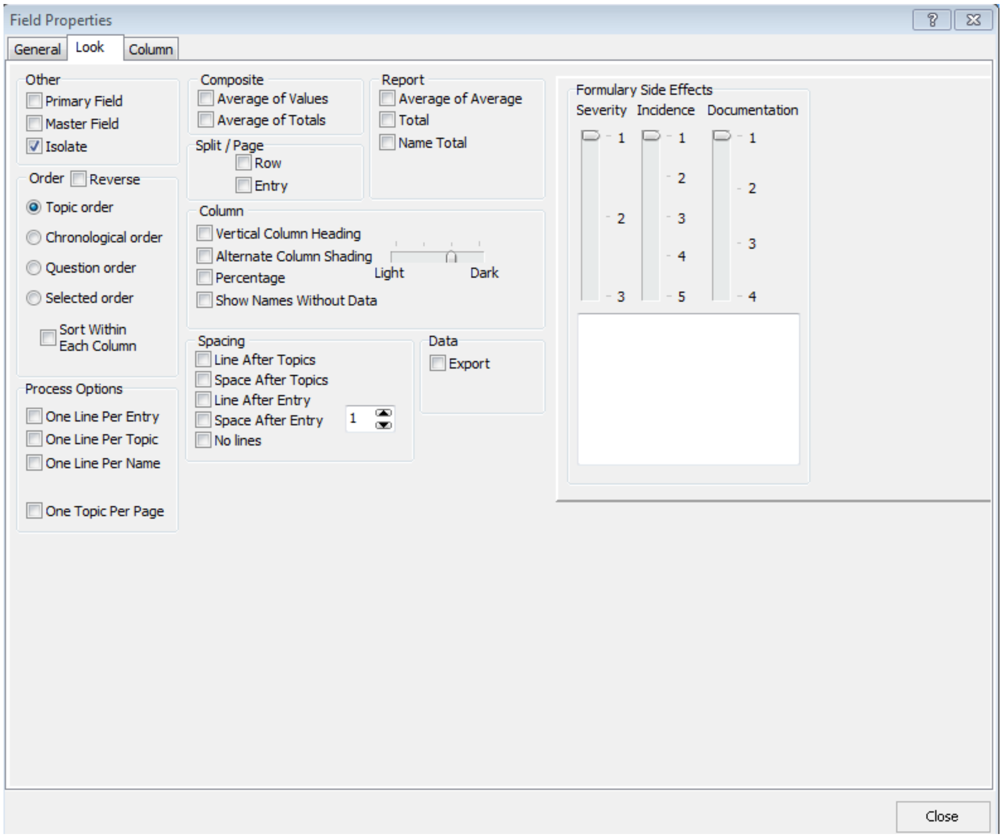
- Variable to content (Width): Place a check here to allow the computer to size the field based on the amount of data in the field. If this item is not checked, the user needs to size the field manually. This defaults checked for text, system, and demographic fields.
- Variable to content (Height): Place a check here to allow the field to stretch vertically in order to pull all desired information so another variable height field can begin underneath without excess spacing in between or having reports run onto multiple pages due to static fields.
- (Maximum) Width - (Maximum) Height: The field width and height (in inches) is in this area. The user may type a number in this area to alter the width/height of the field.

Location: Displays the placement, or coordinates, of the field on the screen. When new fields are created, they always appear in the upper left corner of the screen. Typically, the field is dragged to the desired location. Another alternative is to alter the coordinates to reflect the desired location.

Field Font/Header Font: Use these to change the font options of the text in the field/header. Each tab has a [Font] and [Color] button. The [Font] button allows for font type, style, and size selection and the [Color] button allows for color selection. In a case where a report is using the Variable to content (Height) option, a Field Name can serve as a heading for that field and the Header Font area controls the font, style, and size of that heading.

Transparent: An option that allows removal of the block outline of the field, if checked. If left unchecked, a frame will appear around the field and the field itself will cover anything beneath it.

Look Tab



Primary Field: This allows the field to be date sensitive.

Master Field: "Hide" blank reports by selecting this option. Without selecting this option, when running a report in ECS (e.g., physician orders report), a report is generated for each client selected. In other words, if running the physician orders report for seven residents, you will get seven reports listed. If two of the seven residents have physicians' orders, two reports print with the information listed and five reports print without any information. With this option selected, reports will not run on clients that don't have the desired information.

Isolate: When "Isolate" is selected, only the words specified in the setup appear in the report. When "Isolate" is not selected, the entire entry appears. When this option is selected in "Sign" fields, only the first column is isolated.

Order - Topic/Chronological/Question/Selected: Defines the order in which the data will appear within the specific field. Placing a check in "Reverse" list the information in the reverse of the order selected, for example, reverse chronological lists data from the most recent first then progresses backward in time.

- Topic Order - the information appears in the order the topics are listed in the field setup.
- Chronological Order - the information appears in chronological order.
- Question Order - the information appears in the order the question words are listed in the field setup.

- Selected Order - the information appears in the order the words are in the field setup. This is like question order, however; "selected order" does not group words by topic.
- Sort Within Each Column – (Column field) Within each column, the data that appears will be sorted by whichever option above is selected.

Process Options: this area is available on the Look Tab for column fields only

- One Line per Entry: Creates one line for each entry across all columns.
- One Line per Topic: Creates one line for each topic across all columns.
- One Line per Client: Keeps each entry for a specific client together across the columns. If this is not selected, the information for an individual client may appear staggered across the columns and no lines appear to separate each client. Note that "Multiple Names per Report" would also need to be selected (using the Options icon).
- One Topic per Page: This option separates topics by page when printing. This is useful in printing care plans when facilities would like each care plan to print on its own sheet of paper.

Composite: Defines the values for the overall report.

- Average of Values- shows the total values of all the averages selected.
- Average of Totals - shows the averages of all the total values selected.

Split/Page (Row, Entry): Select the Entry or Row checkbox if you want to split entries, client information, or rows between pages. There may be circumstances where you do not want this checkbox selected because you want information together on one page. For example, when printing a care plan report, the report by default splits entries and/or rows between pages, so you may end up with part of a care plan approach on the bottom of one page, and then finish on the top of another page. This can be cumbersome to read. If the checkboxes are not selected, the entire approach would carry over to the top of the next page if the entire entry did not fit on the bottom of the first page. In addition, rather than just making the entry not split, you can disable the split between row, so the entire care plan will start on a new page if it does not fit on the bottom of the first.

Column: This area is available on the Look Tab when editing a column field.

- Vertical Column Heading: Prints the Column Heading words up and down instead of across, allowing the column width to be minimal. Use this for columns which will not be very wide, as in Yes/No columns.
- Alternate Column Shading: Causes every other column within the specific field to be lightly shaded when it prints. This makes it easier to find information on a grid of columns, such as are found on a Medication sheet.
- Percentage: Sets the column to show a percentage.
- Show Names Without Data: When set, the names of clients not containing the information requested on the report appear. When not set, only the names of clients containing information requested appear on the report.

Spacing: Defines various options to cosmetically separate the entries or topics. Options include: a line after topics, space after topics, line after entries, space after entries, and no lines. If none of these options are selected, there will be no spaces or lines between entries or topics. More than one option may be chosen, if desired. By default, column fields have lines drawn between entries, if no lines are desired the user may need to select "No Lines" in this area.

Report: Further defines values for the overall report.

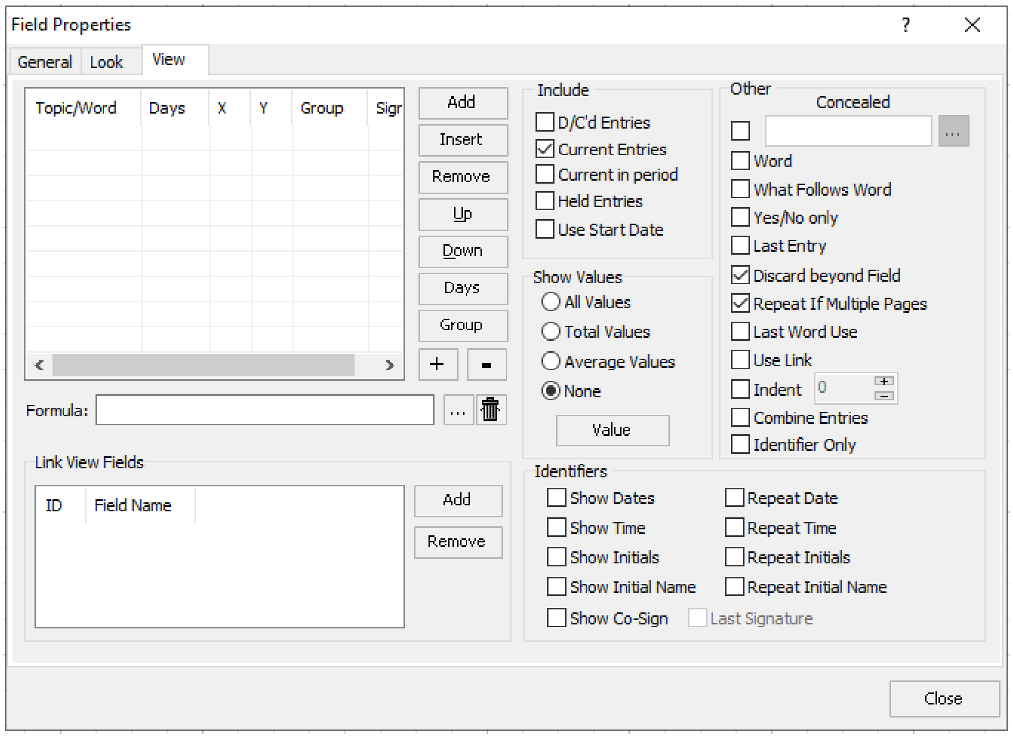
- Average of Average - shows the average value of all the values selected.
- Total - shows the total value of all columns per column.
- Name Total – provides a total for the number of clients appearing in the report.

Formulary Side Effects: American Data's Electronic Chart System has a pharmacy formulary embedded within the system. When a facility uses this formulary, they may select filters for side effects. The side effect filters include severity [mild (rash) to severe (death)], incidence [common (diarrhea) to rarely seen (death)] and documentation [this is how much documented evidence is found in clinical literature]. Place your cursor on a slider, hold the mouse button down and move to a slide bar position to see a more detailed explanation of that level of filter.

Export: Select this checkbox to be able to turn this report into a data file that can be used in other programs like Excel for further analysis of the data. Selecting this checkbox will add an Export button on your toolbar when previewing the report. Click this button, enter a file name, and select a location of where you would like to save the file. The file will be exported and saved as a .csv file which can then be opened using Excel.

**View fields have an additional option on the Look tab. "Frame Offset", allows the user to put a frame around the view field. The number designated represents the number of pixels for the width of the frame. The frame color may be selected by clicking Frame Color.

View Tab



View: Defines the list of topics, specific words, or days which have been chosen for the view field. If this is not defined the field will be blank.

- Add/Remove: Click Add to bring up the topic selection screen. The topics and words are added to the bottom of the list. Click Remove to remove the highlighted topic/word from the list.
- Use Insert to add a topic/word to a location in the list. The topic/word is inserted above the topic/word highlighted in the list.
- Up/Down: Select a topic/word from the list and click Up or Down to move it to another position in the list. The items may not be moved when the field is set to View in Topic Order.
- Days: Sets the desired number of Days to be included for the specific topic/word. If no Days are set the selections are made from the entire record. To set the number of days highlight the topic/word and then click Days. Type the desired number of Days and click OK.
- Group: Assigns the topic or word to a group. To set a topic or word to a group highlight the topic/word and click Group. A box appears set the desired group and click OK. To remove a group, highlight the topic/word, click Group and assign a group of "0" and click OK. For example, if there are three words from a single topic in the list and the last entry entered for each one is what should display, each word must be set to its own group. And on the contrary, if the last entry of any of three different word options is desired, all three items would need to be set to be the same group.
- +/-: Makes the word positive or negative. This is most often used for billing reports.
- Formula: This allows for a formula to be added into a view field, therefore able to more narrowly determine the data that populates. For example, if a user wants the

CONTACT NAME for only the Healthcare representative to display, then a formula may be added to state, "If Any of – Healthcare representative." This will narrow down the entry that displays in the view field to only pull data IF the formula applies.

Include: Defines the type of entries to be included in the field. D/C'd and Current Entries may be both selected but when Current in Period is used this should be the only one selected.

- D/C'd Entries pulls discontinued entries to this field in the report.
- Current Entries pulls current entries to this field in the report.
- Current in Period pulls entries that were current during the time period specified when running the report. (This means the entries may now be discontinued).
- Held Entries pulls entries in a held status into this field in the report. Held entries appear with *********HELD ENTRY********* in front of them.
- Use Start Date sets the report to pull data only from a client's most recent stay. For example, if a client has been to the facility twice, then with this checkbox selected, only the data from the second stay will appear on the before. Before this setting can take effect, initial setup must be in place in *File > Setup > System Settings > Review > Start Date Word*.

Show Values: Defines what aspect of the value is desired.

- All Values lists all the individual values.
- Total Values shows the total of all values.
- Average Values shows the average of all values.
- None specifies that no values are to show.

Value (button): This defines information to be pulled from the values tab in word properties.

Identifiers: Defines information regarding entry date, entry time or author's name to be placed within the highlighted column. When Show CoSign is selected, the view screen displays the date and initials of the user who cosigned the entry via the Electronic Co-Sign feature in ECS. Select Last Signature to have only the most recent co-signature displayed on the entry rather than ALL co-signatures for the entry. To have any of the identifiers repeat per entry, place a checkmark in the appropriate Repeat option. If not checked, when there are several entries with the same date, time, user initials, etc. the identifier will not repeat to the left of the entry.

NOTE: To display the full name of the user who co-signed an entry the report must have both "Show Co-Sign" selected and "Show Initial Name" selected. You many also need or choose to have "Repeat Initial Name" selected.

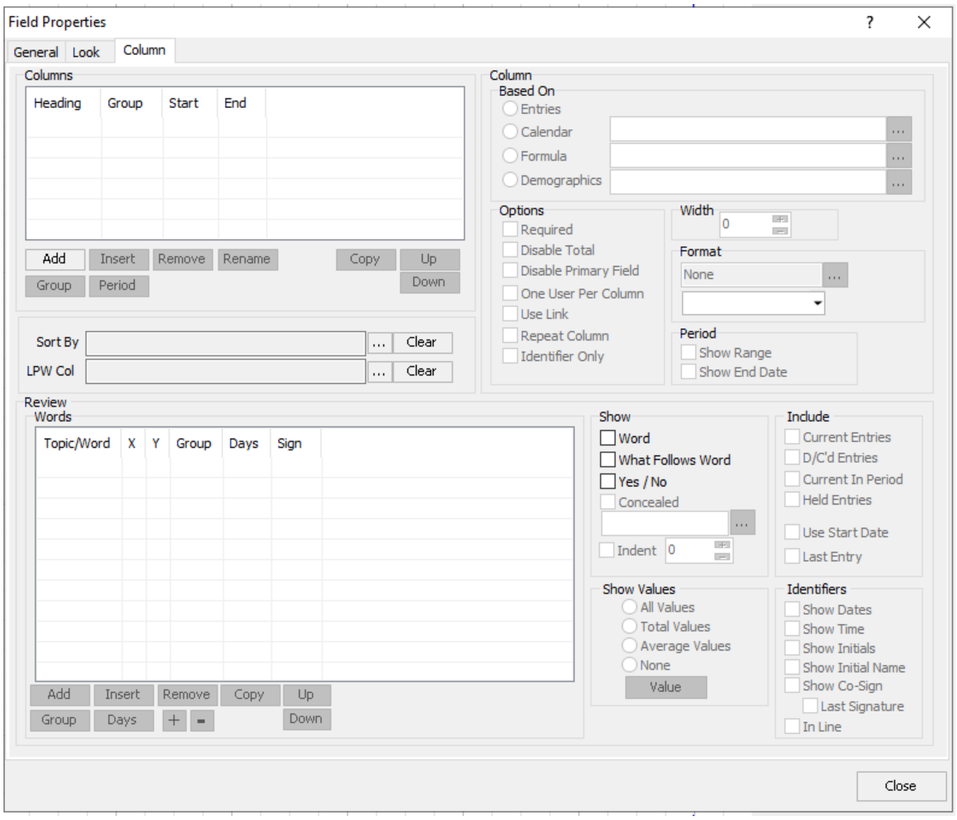
Other: Controls the format and content of the field.

- Concealed: Allows concealed words to print in the field. If this selection is not checked concealed words will not print within the field. An example of concealed words is side effects for medications. There may be up to 16 levels of concealed words. To select a level, click the pick list box and select a level (multiple may be selected). For more information on concealed words see the Word Setup portion of the manual.

- Word: Used to pull the specific word itself from the documentation. Surrounding words or typed text would not be included. For example, the word INCIDENT would appear, but not INCIDENT: fall. This is usually chosen in conjunction with What follows word to avoid that circumstance.
- What Follows Word: Pulls the text which follows the word in the documentation. This does not pull the defined word itself but the text after it. This option may be used with Button or Non-Button words however most frequently it is used with Button Words. Surrounding words and typed text are included but not the word itself. This selection may be chosen in conjunction with Word.
- Yes/No Only: Places an X within the field when the content designated for the field is present.
- Last Entry: Used to pull only the most recent entry as defined in the field. Previous entries are not included in the field even if they remain current when this selection is made.
- Discard Beyond Field: Discards data that does not fit in the field. This prevents reports from going into an infinite loop. This also prints the information on successive pages. An example of this is a view field that pulls room number. The room number would print on page 1, page 2, etc.
- Repeat if Multiple Pages: Select this checkbox if the report might have subsequent pages and this should print on all of them.
- Last Word Use: Pulls the last time a word was used within an entry. This may be useful when capturing the last time something was evaluated. Many times, when something is evaluated the user appends the original entry with a date of evaluation.
- Use Link: Some clients in the system may have other clients linked to their record (e.g. husband and wife may be linked). When the report is to pull information for the specified client, and anyone linked to that client place a check here.
- Indent: When indent is selected the report recognizes word properties for formatting. When this is not selected the information is shown without formatting.
- Combine Entries: Use this property to display information from left to right in the report instead of top to bottom. For example, suppose a resident has the question word ALLERGIES: used multiple times. Without using this property, the report will list those multiple entries from top to bottom. This property will display the allergies from left to right, ensuring that all allergies can be displayed on one page.
- Identifier Only: When this is checked, only the item(s) checked under the *Identifier* section (Show Dates, Show Time, Show Initials, Show Initial Name) of the field will display. For this option to work correctly, there must be data in the *Review Words*, something checked under *Show*, as well as something checked under *Include*.

Link View Fields: This may only be used on label reports. One field may be made to be dependent upon another field. Use Add to define the field being linked. Use Remove to remove the defined field.

Column Tab



Columns: This box will display columns in your report and their information.

- Add: Allows you to add a column to the field and to give the column a name. When this is clicked an Add Column box appears. Type in the name of the heading and click OK. If other columns have already been set up the new column appears at the end of the list.
- Insert: Allows you to insert a column into a position in a list of existing columns. Highlight the column just below where the new column is to appear. Click Insert and an Add Column box appears. Type in the name of the heading and click OK.
- Remove: Removes a column heading. Highlight the desired column then click Remove.
- Rename: Allows you to rename an already existing column.
- Copy: Select a column to copy and click Copy Column the button changes to Paste Column. Click Paste Column and the column pastes to the bottom of the list. The user may click the Paste button multiple times.
- Up/Down: Clicking on Column Up or Column Down moves the highlighted column up/down the list.
- Group: Allows the grouping of Columns together for purposes of selecting topics/words for consideration (this is especially useful for reports with Yes/No columns). For example: Independent, Supervised, Limited, Extensive and Total Assist for Bathing may comprise a group. The last documented response within the group is considered. Highlight the desired Column, click Group, designate the group number,

and click OK. Click **Remove** to remove the group. The Column will remain but its designation as part of a group is removed.

- **Period:** Period allows a period to be designated per column. Highlight the column and click Add Period. A Select Period box appears. Designate the period and click OK. Click **Remove** to remove a period from a column.

Column - Based On: The report can be set to pull information per column. For example, I have a report that has a total of 5 columns. Of those 5 columns I would like 4 of them to pull information to the column based on the date the entry was made and 1 column to pull information based on the date in the entry.

- **Entries:** Entry Date –Pulls information based on the date of the entry (the date the entry was made). This is the default
- **Calendar:** Pulls information based on the date in the entry. To set this up click the pick list box. Select the column that includes the calendar word and click OK. To Remove a column from the list, click the pick list box and click OK without highlighting any columns.
- **Formula.** Pulls information based on a selected formula. Click the picklist box and select a formula.
- **Demographics:** Defines the content of the highlighted column to pull information from the Demographic portion of the program. Client demographics, Provider demographics and Vendor demographics may be pulled to reports. Click **Clear** to clear the demographics from a specific column.

Width: Sets the width (in inches) of the highlighted column. A width must be individually set for each column.

Format: Formats columns. The data may be formatted to appear in Text Money Format, the decimal may be dropped, and/or values may be right or left justified, or centered.

Sort By: Sort tasks may be linked to a column report (e.g. room number order). Click on the pull-down arrow to select the desired sort task.

LPW Col: (Line Per Word) This gives you the ability to have words in the chosen column pull, even if there is a not a resident charted with that word the day it is ran. This could be used to create a room list report that pulls the room even if it is empty.

Options:

- **Required**: This allows for filtering data that pulls to the report. As an example, you could create a column report that has 3 columns: 1) resident name, 2) room number and 3) pressure sore. If you do not have this "Required" option selected, you will have a report that prints all in -house clients who have a room number (i.e. everyone). This is not the intent of the report. If you were to place a check in "Required" for column #3 (pressure sore) your report will pull only those residents who have pressure sore documented in their chart. This option is used to define the report.

- Disable Total: Used to disable the Totaling feature for individual columns. If the report is set to "Total" (on the Look tab) placing a check here disables the totaling for the column selected.
- Disable Primary Field: Used to disable the Primary Field feature for individual columns. If the report is set to "Primary Field" (on the Look tab) placing a check here disables the primary field for the column selected.
- One User Per Column: This is an option independent of the date option above. This option works in conjunction with selecting users when generating the report. For example, I may wish to evaluate productivity of staff members based on information they document in the system.
- Use Link: Some clients in the system may have other clients linked to their record (e.g. husband and wife may be linked). When the report is to pull information for the specified client, and anyone linked to that client place a check here.
- Repeat Column: When this is checked on a column, the information in that column will repeat for every row of information, regardless of other settings on the report, like "Line per Entry." This feature is beneficial if the report is to be exported, so that each row of data has identifiers associated with it. *One Line Per Entry* on the Look tab must be active to utilize this option.
- Identifier Only: When this is checked, only the item(s) checked under the *Identifier* section (Show Dates, Show Time, Show Initials, Show Initial Name) of the field will display. For this option to work correctly, there must be data in the *Review Words*, something checked under *Show*, as well as something checked under *Include*.

Period: When using periods in a column report the user may display either the date range of the period in the column heading or the end date for the period in the column heading.

Review – Words: This is where you can specify which information should be pulled to the report. Topics and/or words are listed here by clicking Add to call the topic selection screen. Using Insert allows a topic/word to be inserted anywhere in the list (will always be inserted above the highlighted link). To remove a link highlight it and click Remove.

- Days: Sets the desired number of Days to be included for the specific topic/word. If no Days are set the selections are made from the entire record. To set the number of days highlight the topic/word and then click Days. Type the desired number of Days and click OK.
- Group: Assigns the topic or word to a group. To set a topic or word to a group highlight the topic/word and click Group. A box appears set the desired group and click OK. To remove a group, highlight the topic/word, click Group and assign a group of "0" and click OK.
- +/-: Makes the word positive or negative. This is most often used for billing reports.
- Copy: Allows the user to copy and paste links from one column to another. Highlight the links to be copied and click on Copy (this button then changes to read Paste). Navigate to the column the links are to be pasted and click on Paste.
- Up/Down: Allows the user to move links up or down in the list.

Show:

- Word: Used to pull the specific word itself from the documentation. Surrounding words or typed text would not be included. For example, the word INCIDENT would appear, but not INCIDENT: fall. This is usually chosen in conjunction with What follows word to avoid that circumstance.
- What Follows Word: Pulls the text which follows the word in the documentation. This does not pull the defined word itself but the text after it. This option is most often used with Question Words. Surrounding words and typed text are included but not the word itself. This selection may be chosen in conjunction with Word.
- Yes/No Only: Places an X within the field when the content designated for the field is present.
- Concealed: Allows concealed words to print in the field. If this selection is not checked concealed words will not print within the field. An example of concealed words is side effects for medications. There may be up to 16 levels of concealed words. To select a level, click the pick list box and select a level (multiple may be selected). For more information on concealed words see the Word Setup portion of the manual.
- Indent: When this is selected the report recognizes word properties for formatting. When this is not selected the information is shown without formatting.

Include: Defines the type of entries to be included in the column. When a column is created Current Entries is the default. D/C'd and Current Entries may be selected at the same time. Current in Period should be used by itself.

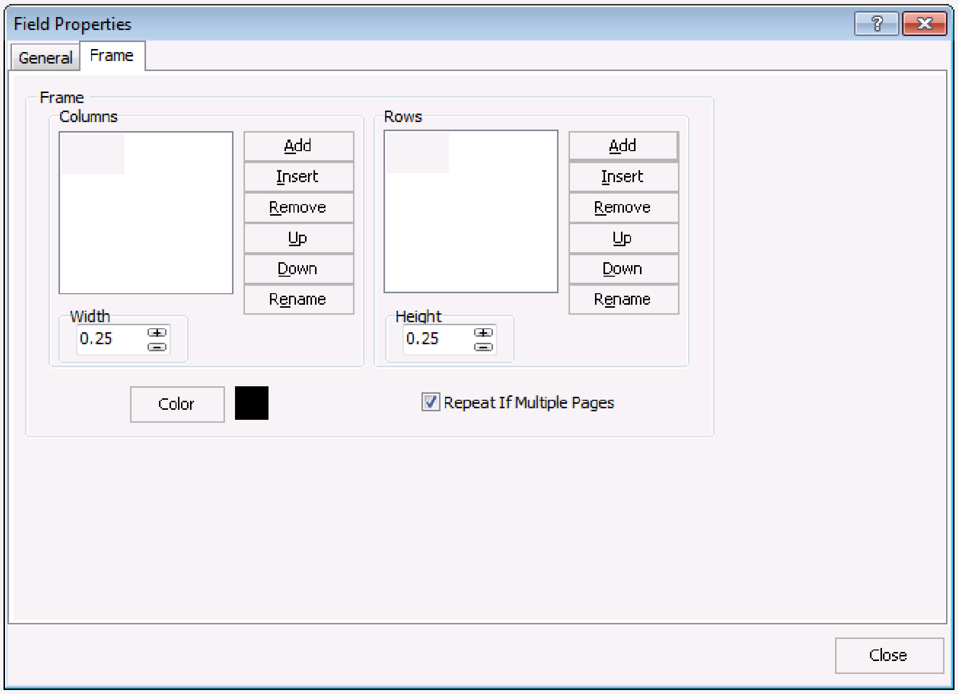
- Current Entries pulls current entries to this field in the report.
- D/C'd Entries pulls discontinued entries to this field in the report.
- Current in Period pulls entries that were current during the time period specified when running the report. (This means the entries may now be discontinued.)
- Held Entries pulls entries in a held status into this field in the report. Held entries appear with *********HELD ENTRY********* in front of them.
- Use Start Date pulls entries for the most recent admission (stay). For this option to function the system administrator must have the settings for "Start Date" in File > Setup > System Settings - "Review Tab".
- Last Entry: Used to pull only the most recent entry as defined in the field. Previous entries are not included in the field even if they remain current when this selection is made.

Show Values: Defines what aspect of the value is desired.

- All Values - lists all the individual values.
- Total values - shows the total of all values.
- Average Values - shows the average of all values.
- None - shows no values.
- Value button - defines information to be pulled from the Values tab in Word Properties.

Identifiers: Defines information regarding entry date, entry time or author's name to be placed within the highlighted column. The option In Line adjusts the identifiers to be on the same line as the entry (as opposed to being on the top of the entry). When Show CoSign is selected, the view screen displays the date and initials of the user who cosigned the entry via the Electronic Co-Sign feature in ECS. Select **Last Signature** to have only the most recent co-signature displayed on the entry rather than ALL co-signatures for the entry.

Frame Tab



Frame fields may be used to created frames, grids, or blocks.

- To create a **frame**: Click the Add Field icon, select Frame, and click Close. Resize the frame by pulling on the edges. The field may be layered behind another field.
- To create a **grid**: Click the Add Field icon, select Frame, and define the Rows and Columns.
- To create a **block**: Click the Add Field icon, select Frame, select the General tab, change the background color, and click Close.

Frame Columns: Frame fields can be boxes or grids. Define the # of columns desired.

Column width may be adjusted by clicking on the +/- buttons or manually entering a number. The width is in inches.

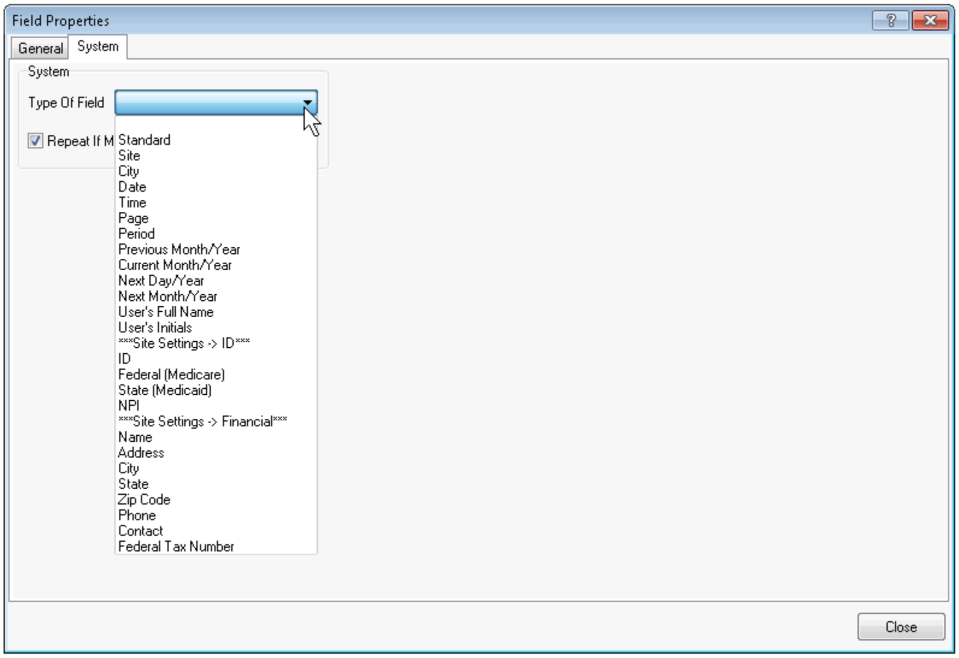
Frame Rows: Frame fields can be boxes or grids. Define the # of row desired.

Row height may be adjusted by clicking on the +/- buttons or manually entering a number. The height is in inches.

Color: The color of the frame field may be altered by clicking **Color**.

Repeat if Multiple Pages: Select this checkbox if the report might have subsequent pages and this should print on all of them.

System Tab



Click on the pull-down arrow to the right of Type of Field. A menu appears with the following options:

- Standard: Prints the facility's/corporation's name and city, the current date and time, and page numbers
- Site: Print the facility's/corporation's name on the report. This comes from the setup of facility information.
- City: Prints the facility's/corporation's city on the report. This comes from the setup of facility information.
- Date: Prints the date the report was printed.
- Time: Prints the time the report was printed.
- Page: Prints page numbers on the report. The format is "Page __".
- Period: Prints the start date and end date the user selected when printing the report.
- Previous Month/Year: Prints the previous month along with the year on the report.
- Current Month/Year: Prints the current month along with the year on the report. This is often used for printing paper MARs for new admissions.
- Next Month/Year: Prints next month along with the year on the report. This is often used for printing paper MARs.
- Next Day/Year: Prints tomorrow's day and year on the report. This is often used for printing daily MARs or flow sheets.
- User's Full Name: Displays the full name of the user who is printing the report.
- User's Initials: Displays the initials of the user who is printing the report.

You can select one of the following fields from the ID tab in Site Settings:

- ID

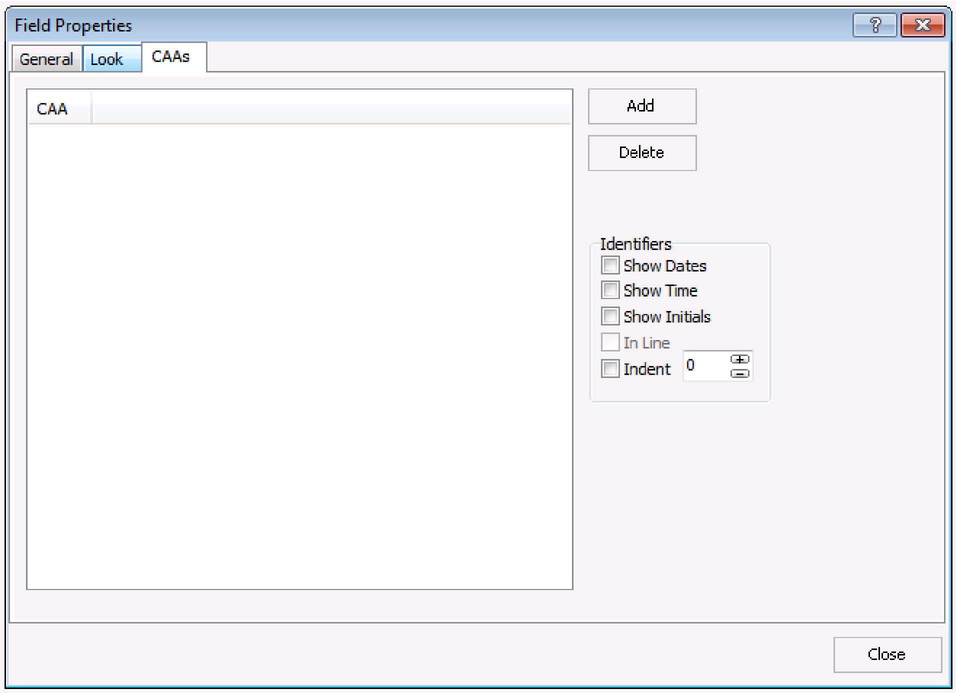
- Federal (Medicare)
- State (Medicaid)
- NPI

You can also select one of the following fields from the Financial tab in Site Settings:

- Name
- Address
- City
- State
- ZIP Code
- Phone
- Contact
- Federal Tax Number

Repeat if Multiple Pages: Select this checkbox if the report might have subsequent pages and this should print on all of them.

CAAs Tab

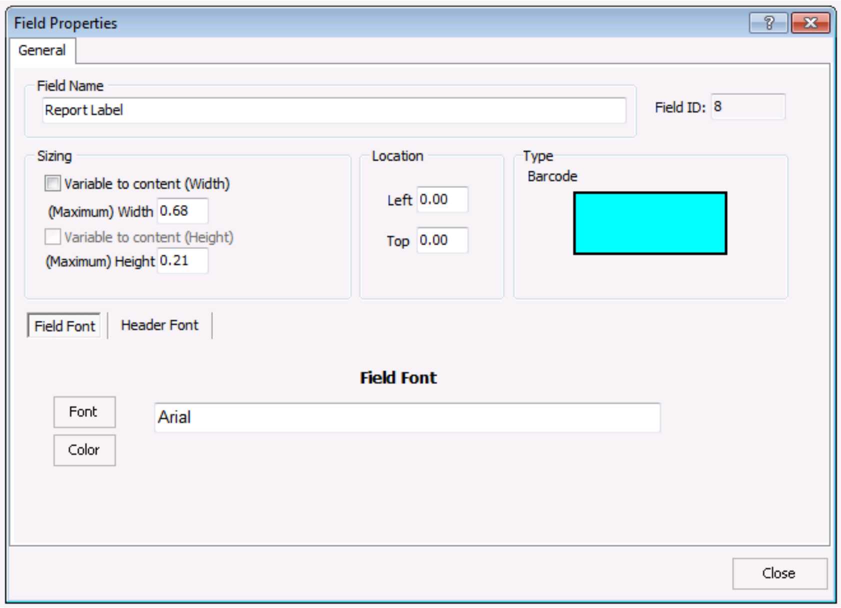


The box on the left side of the screen is where the CAAs are listed when they are included in the report setup.

Add: Defines which specific CAAs are to be pulled in the field. Click **Add** and highlight the desired CAAs. To add multiple CAAs, hold down CTRL or SHIFT on the keyboard when selecting them. CAAs are added to the bottom of the list as they are selected.

Delete: Removes CAAs from the field. To remove a CAA highlight it and click **Delete**. To remove multiple CAAs hold down CTRL or SHIFT as they are highlighted.

Identifiers: Defines information regarding entry date, entry time, or author's name to be placed within the highlighted column. The option "In-Line" will place dates/times on the same line as the data (by default the dates/times are listed on a separate line). The option "Indent" places the designated # of inches between Question Words and Canned Phrases. Selections from this list are optional.



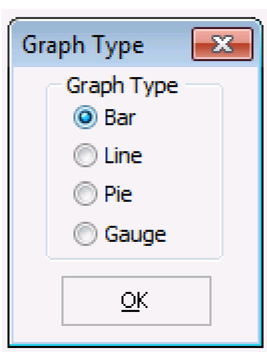
Bar Code Tab

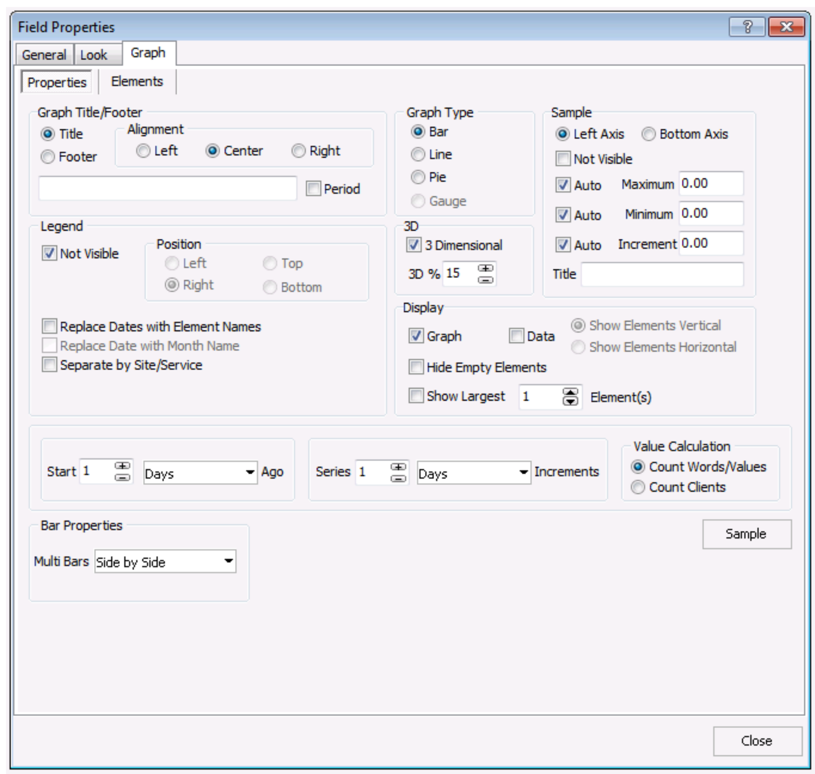
The Bar Code field allows for printing client bar codes. Create a report with this field. The field does not need to be defined (this is its only purpose).

Graph Tab

When a user chooses to create a graph field, they are presented with a menu to define what type of graph to create. Options for graph type include: Bar, Line, Pie and Gauge. When a graph field is created there are 2 tabs presented to define the graph: "Properties" and "Elements".

The Properties tab is where the user defines the general properties of the graph. Each graph type has its own properties in the lower left corner.





Alignment

- Left: the user can specify where the title/footer will be placed on a report. "Left" is selected if the title/footer is to be aligned on the left side of the report.
- Center: the user can specify where the title/footer will be placed on a report. "Center" is selected if the title/footer is to be aligned in the center of the report.
- Right: the user can specify where the title/footer will be placed on a report. "Right" is selected if the title/footer is to be aligned on the right side of the report.

Period checkbox: When this option is checked the field will reflect the date range that is set on the Properties tab. This is useful when printing pie graphs and gauge graphs. If you would like the time period, the graph is illustrating to print (e.g. pie graph generating data from the past year) you must put a check in this property "Period". For example, if the field is set to look back "Start 30 Days Ago", the period field will count back 30 days from the report is generated and display that date range at the top of the field on the report.

Legend: The Legend is the description of the bars/lines or slices on the graph. Place a check in "Not Visible" to hide the Legend on the report.

Replace Dates with Element Names: When bar graphs are generated, the dates, by default, appear under each bar to show the user the range of dates that each bar represents. When Replace Dates with Element Names is selected, the dates will no longer appear under the bar. Instead, the actual name of the element appears. For example, if there are two elements named "Element A" and "Element B" and the bar graph is set up to look back 12 months in 1-month increments, when the bar graph is generated, each month date range will appear under the element. When Replace Dates with Element Names is then selected, the user will see the name Element A and Element B under the bar instead of the date ranges.

Replace Date with Month Name: When bar graphs are generated, the dates appear under each bar to show the user the range of dates that each bar represents. When the graph is set to increment by month, the option Replace Date with Month Name becomes available. When this checkbox is selected, the dates appear as month names on the graph. For example, 02/01/2012-02/28/2012 becomes February.

Separate by Site/Service: Select this checkbox to display bar graphs representing multiple sites and multiple services.

Graph Type: Select the graph type (bar, line, pie, or gauge).

3D

- 3 Dimensional: When this is selected, the graph is displayed in 3D.
- 3D %: Select this checkbox to manually specify how the 3D will appear on the Graph report. Use the 3D % pick box to specify the percent.

Axis

- Left Axis: The Left Axis are the numbers that appear on the left side of the graph. The maximum and minimum numbers and increments may be specified.
- Bottom Axis: The Bottom Axis is the numbers/dates that appear on the bottom of the graph. The maximum and minimum numbers and increments may be specified.
- Not Visible: Placing a check in "Not Visible" hides the Left and or Bottom Axis from the Graph report.
- Auto Maximum: Auto is set as the default. The computer automatically configures the Maximum axis for the Graph report. Remove the check from Auto to create your own Maximum axis.
- Auto Minimum: Auto is set as the default. The computer automatically configures the Minimum axis for the Graph report. Remove the check from Auto to create your own Minimum axis.
- Auto Increment: Auto is set as the default. The computer automatically configures the Increment for the Graph report. Remove the check from Auto to create your own Increment
- Title: A Title can appear by the Left and the Bottom Axis to specify what is being graphed. Click on the desired axis to specify what the title will read (e.g. Left Axis-Weight, Bottom Axis-Weights for Past 6 Months in 1-month Increments).

Sample: Click Sample to see a sample of how the Graph report will appear.

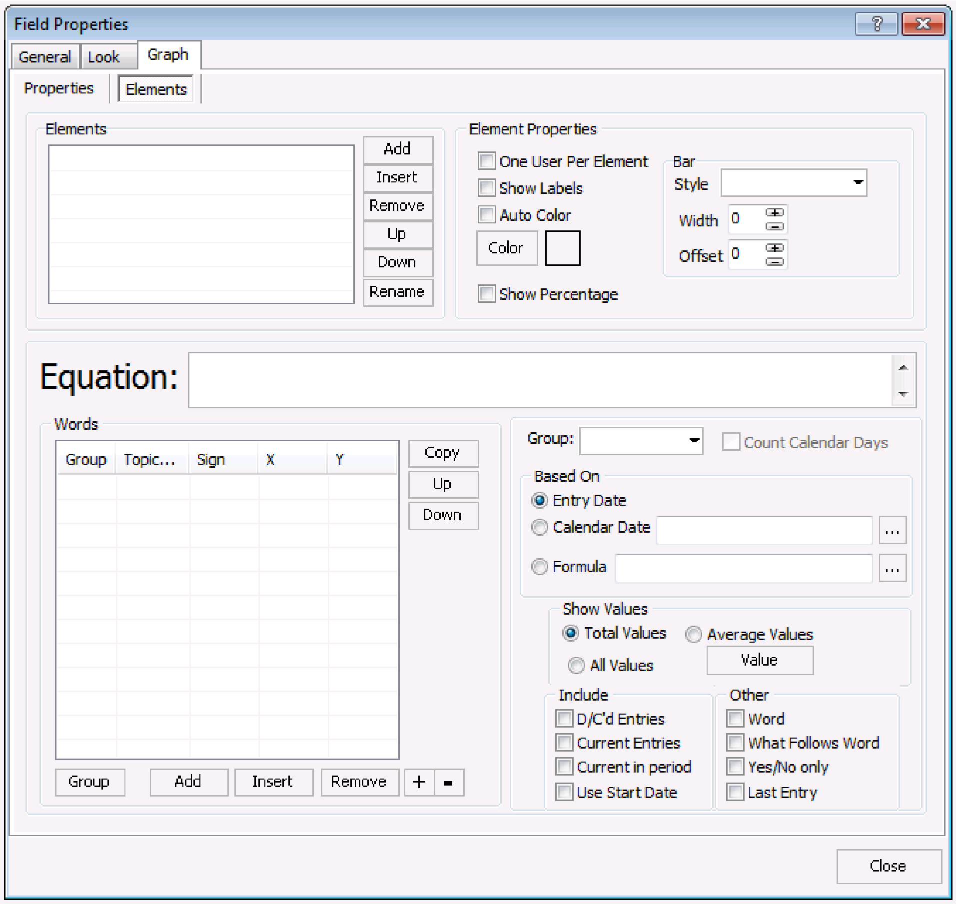
Start: This is where the beginning time frame for gathering data for each element is defined. Highlight the start field and either type in the desired number of hours, days, weeks, or months upon which you wish this element to begin looking at data or use the up/down arrows. Select Hours, Days, Weeks, or Months from the Ago area. If a start number for each element is not defined, the graph will likely not contain any information as the default setting is 1 Day Ago.

Series: The blocks of time in the breakdown of the graph. For example, if a user wanted to evaluate the number of falls quarterly, they would set the series to 3 and Increments to Month. Increments are hours, days, weeks, or months.

Value Calculation

- Count Words/Values - This defines the type of calculation to be used when determining the percentages used on the graph. It sets the graph to count the number of words/values used. For example, this may be used when setting up a graph to count the specific number of activities attended by an individual resident.
- Count Clients - This defines the type of calculation to be used when determining the percentages used on the graph. Count Clients sets the graph to count the number of clients. For example, this may be used when setting up a graph to count the number of residents receiving psychotropic medications.

The Elements tab is where the user defines the specifics of the graph.



Elements table

Add: Allows user to add an element to the field and to give the element a name. When this is clicked on an Element box appears. Type in the name of the element and click OK. If other elements have already been set up the new element appears at the end of the list in the box on the left. This heading appears on the graph

Element Properties

One User Per Element: When this option is selected, the report compares information from one user against another (i.e. physical therapy minutes for all the physical therapy staff). Each user must have their own individual element created for comparison, so if there are 4 users being compared, 4 separate elements must be created.

For each element, select the One User Per Element checkbox and the Calendar Date checkbox and make any other setup changes needed.

Multiple Clients per Report must be selected from the Options area in Report Maker if multiple users are to be compared in the same report. If viewing only one users information per report, do not select the Leave Multiple Clients per Report checkbox in the Options area.

Show Labels: When this is selected, labels appear on the graph element.

Auto Color: When this is selected, the computer assigns colors to each element.

Color: Click on this button to assign the color of your choice to an element.

Words - List View: The information that is to pull to the graph is defined here. Click Add to add words to the setup. Click Insert to insert words into an already existing list. Click Remove to remove a highlighted/selected word from the list.

Based On: Specifies how the graph is to pull data from the specified time period

- Entry Date: Pulls information based on the date of the entry (the date the entry was made). This is the default.
- Calendar Date: Pulls information based on the date in the entry. To set this up click the pick list box. Select the column that includes the calendar word and click OK. To Remove a column from the list, click the pick list box and click OK without highlight any columns.
- Formula: Formulas may be linked to graphing fields. Formulas allow for more specific data to be pulled to the graph. For example, you may wish to have a graph pull all falls without follow-up documentation compare to falls with follow-up documentation. The formula is first created (IF ANY OF: fall AND NOT: follow-up then pull the number of occurrences) (IF ANY OF: fall: AND: FOLLOW-UP then pull the number of occurrences) and then it is linked to the graphing element.

Include: Defines the type of entries to be included in the graph. D/C'd and Current Entries may be selected at the same time. Current in Period should be used by itself.

- D/C'd Entries pulls discontinued entries to this field in the report.
- Current Entries pulls current entries to this field in the report.
- Current in Period pulls entries that were current during the time period specified when running the report. (This means the entries may now be discontinued).
- Use Start Date pulls entries for the most recent admission (stay). For this option to function the system administrator must have the settings for "Start Date" in File > Setup > System Settings - "Review Tab".

Show Values: Defines what aspect of the value is desired.

- Total Values shows the total of all values.
- Average Values shows the average of all values.
- All Values shows all values during the designated time period.
- Value Button: This defines information to be pulled from the values tab in word properties.

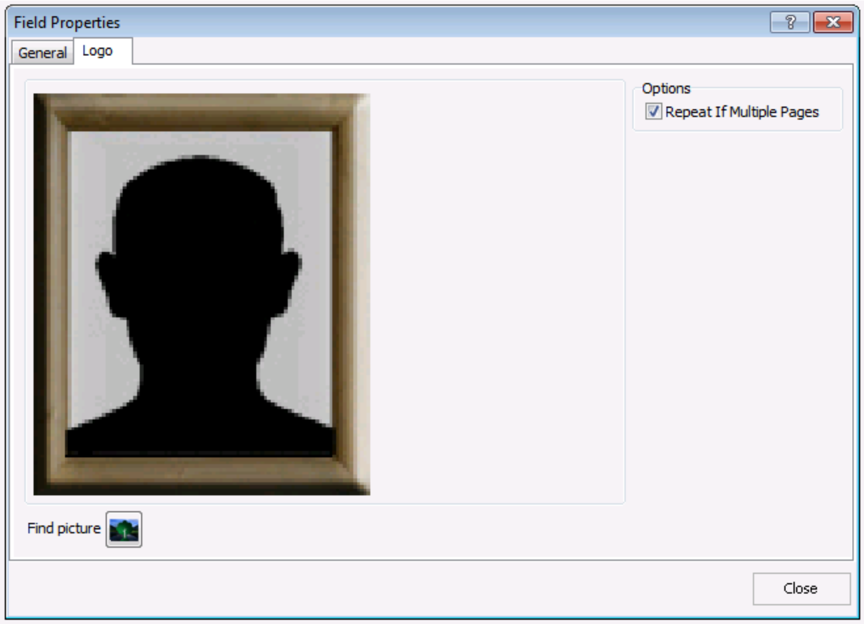
Other: Controls the format and content of the field.

- Word: Used to pull the specific word itself from the documentation. Surrounding words or typed text would not be included.

- What Follows Word: Pulls the text which follows the word in the documentation. This does not pull the defined word itself but the text after it. This option may be used with Button or Non-Button words however most frequently it is used with Button Words. Surrounding words and typed text are included but not the word itself.
- Yes/No Only: Places an X within the field when the content designated for the field is present.
- Last Entry: Used to pull only the most recent entry as defined in the field. Previous entries are not included in the field even if they remain current when this selection is made.

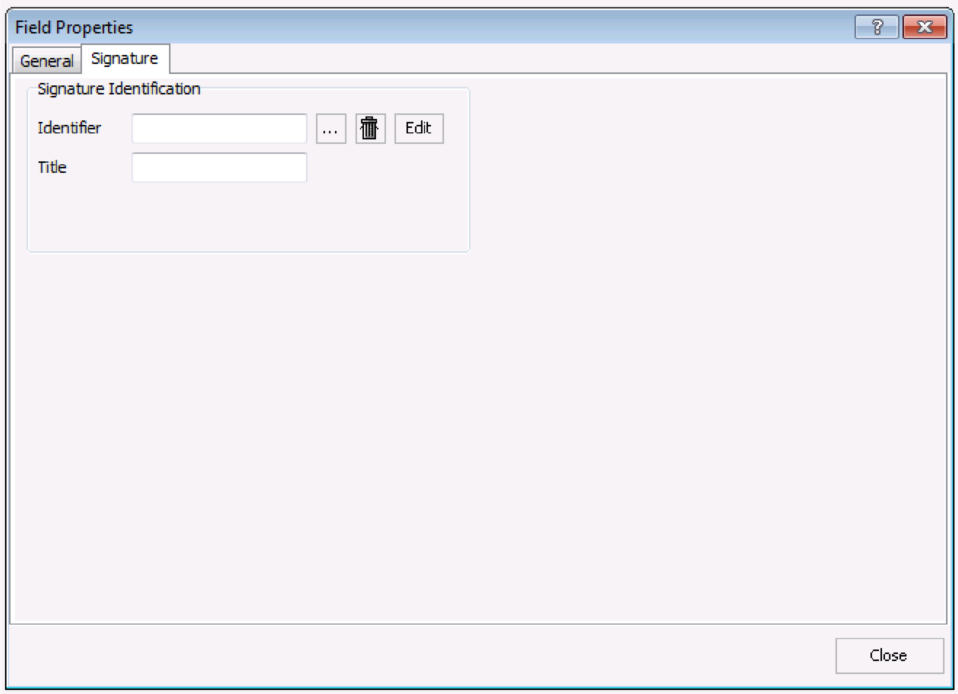
Logo Tab

When setting up a Picture field in ECS, click "Find Picture" on the Logo tab. Browse to find the desired image, select it and click **OK**. You can choose to use the "Variable to Content (Width)" option on the General tab. Clicking **Close** on the field properties box closes the setup screen and the user now sees the image on the report. The image may be moved or resized (if not using the "Variable to Content (Width)") feature).



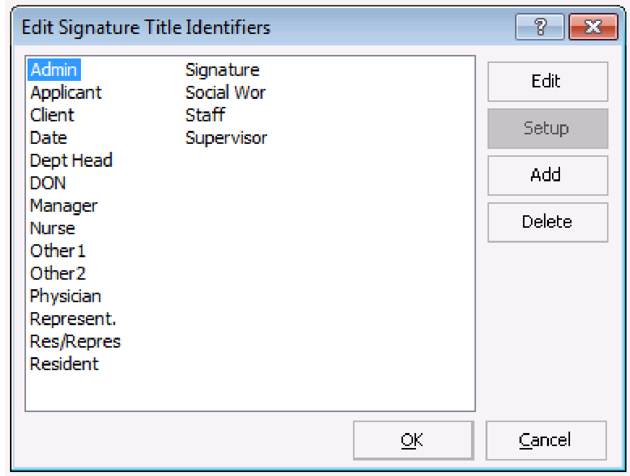
Repeat if Multiple Pages:
Select this checkbox if the report might have subsequent pages and this should print on all of them.

Signature Tab



Identifier - Enter a unique name or label used to group signature boxes when wanting to run multiple reports and only having to sign once.

To create an identifier, click **Edit** next to the picklist box.

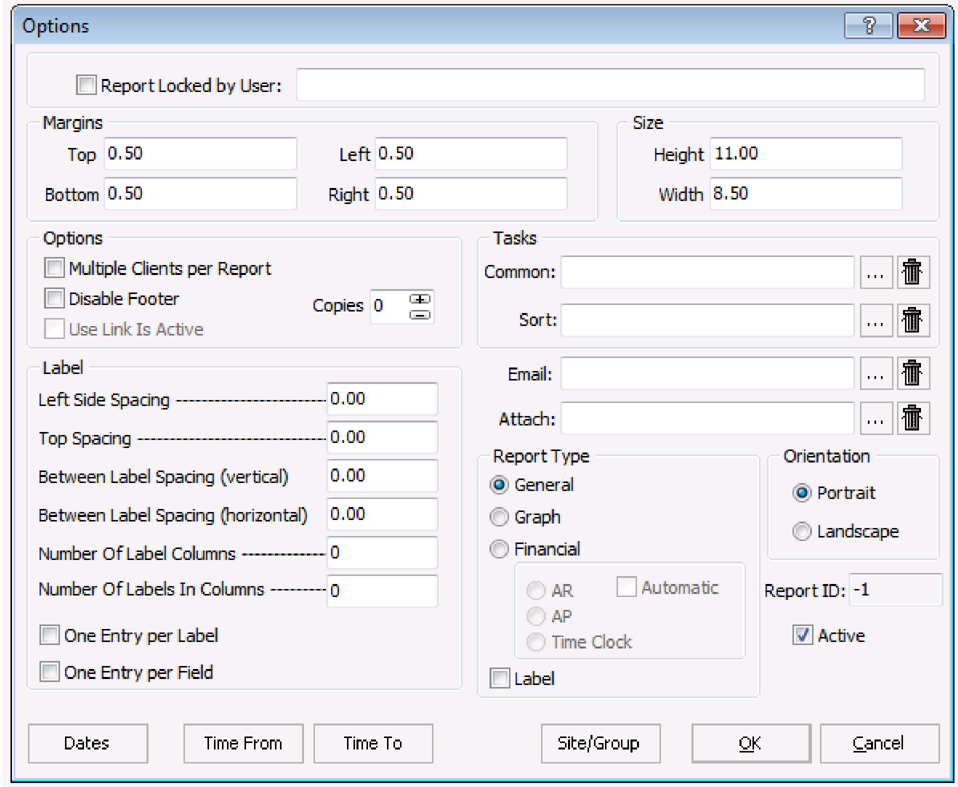


1. Create a new identifier by clicking **Add** and entering a name.
2. To rename an existing identifier, highlight the name and click **Edit**.
3. To delete a modifier, highlight the name and click **Delete**.
4. When you are finished in this window, click **OK** to save any changes.

Title - Enter a name used to distinguish one signature field from another. The title may be different for every signature field; therefore, they are not saved in a list like the identifiers. To give a signature field a title, click in the box next to Title and create a name.

Overall Report Options

To access the overall report options, click onto the hammer/wrench icon .



Report Locked by User: Select this checkbox to lock all other users from making changes to the report. The user who enabled the lock is listed here.

Margins: Defines the margins of the report. The default settings are 0.50 in each option. Typically, these are not adjusted unless creating a report which produces labels.

Size

Height and Width: Defines the size of the paper upon which the report prints. The default setting is 11 inches height and 8.5-inch width. Most reports are printed on this size of paper.

Options - Multiple Clients per Report: Select this checkbox to have more than one resident print on a report. When this checkbox is not selected, each resident appears on a separate report.

Disable Footer: Select this checkbox to remove the footer from the printed report.

Copies: Determines how many copies of the report will print. The default setting is 0, which produces one copy of the report.

Tasks

Common and Sort: Common tasks and Sort tasks may be linked to a report. Linking these decreases the number of keystrokes for generating reports.

Label: Specifies the format for labels.

Left Side Spacing: defines where the left border of the first label is positioned from the left side of the label sheet

Top Spacing: defines where the top border of the labels is from the top side of the label sheet

Between Label Spacing (vertical): Defines amount of space is vertically between labels.

Between Label Spacing (horizontal): Defines amount of space is horizontally between labels.

Number of Label Columns: Defines how many columns of labels are on the label sheet

Number of Labels in Columns: Defines how many labels are in each column on the label sheet

One Entry per Label: Specifies that each entry is to print on a separate label.

One Entry per Field: Prints one entry per field per label.

Report Type: Defines the type of Report which enables various options on the field set up screen. Choices include: General (the default setting, used for most Clinical reports), Graph, Financial, and Label Report. Financial reports are further broken down to include AR (accounts receivable), AP (accounts payable) and Payroll.

Orientation: Determines the direction on the paper in which the report prints. The default setting is portrait.

Report ID: Used for technical assistance.

Site/Group: Allows for the selection of facilities and groups that may access the report.

Dates: When you click the Dates button, a new Date Selection form appears. You have the option of specifying a start date. An example when you may want to use this for is the Therapy Cap summaries. Set the Start date for January 1st and it will pull the current year. This will automatically update each year so there is no need to reset this date in subsequent years.

By default, reports are set to No Dates. This means that ECS is not selecting dates for the user, but the user still can select dates if they want. Please keep in mind the Primary Field property. Remember that only fields with this property respect these date selections.

Choosing Force Selection requires the user to select desired dates when running the report. Selecting any of the other options saves the user from needing to select dates, ECS will do this for them (thus saving them time!).

Time From/Time To: A report can be set to run for certain time spans during the day. Foe example, 7pm-7am. This may be useful so that facilities who utilize 12-hour shifts can run reports for the night shift that accurately reflect the charting that was done throughout the entire shift. These time words should be set to the start time – end time of the shift, so that it will run for that same time each day.

Error Check

Error Check

Each time the ECS system administrator saves a change to a report, ECS runs an error check. If errors are found ECS asks the user if they would like to review the list. Users have the option of ignoring the error check; however, be warned that this might cause your report to fail/not function appropriately.

On reports with multiple fields it can be difficult to determine which field the error is contained in. One method for finding the appropriate field is to highlight the Error or Warning and click the **Go to Problem** button.

Tips and Tricks

Move Multiple Fields at Once

When setting up a report, you may find that you need to move multiple fields at one time. For example, you set up three fields on the right side of the screen but need to move them to the left side. You can click into the Report Maker screen and drag your mouse over the fields you wish to move. Once the fields are highlighted, you can move all three of the fields together. These fields do not need to be moved individually and then re-aligned.

Primary Field and Disable Primary Field

Giving a field this property signals the report engine to honor the selections made in the Report Selection screen. If you look at the image below, the Period, Date/Time, Topic, and User's information (circled in the image) affect only those fields with Primary Field selected on the Look tab. Fields that do not have the Primary Field option selected will ignore the Report Selection filter specified.

Column fields are unique in that these pull a large amount of information and the information pulls from various areas within the electronic chart. It is possible that you may want one column to have the Primary field option but another column to ignore this function. Therefore, the **Disable Primary Field** option was created.

For example, a column report pulls the resident's name, room number, and new falls within the time period selected. When the column 'room number' is set to pull 'Current Entries' you will find that many of your residents will have an empty room number result on this report.

Set Fields as Required

As previously stated, column fields can be set up to pull a large amount of information from several areas of ECS. Often, we hear requests for assistance with filtering data that pulls to these reports.

For example, a column report pulls the resident's name, room number, and new falls within the time selected. The only residents you would like to have pull to this report are those who have had a fall or incident in the time period selected when generating the report. This can be done by using the **Required** option for the desired column. This option is found in the column field Column tab in the Other panel. This option may be used on more than one column in a report. If we look at this example, we could require both a fall/incident and the presence of a psychotropic medication on the resident's chart.

Pull Information from Particular Time Periods

Periods have been a capability in ECS for several years now and as more people utilize this feature the more refined it is becoming. As review, a report may be setup to pull information from a time period in separate columns. For example, review of blood sugars over the past month. You can create a column report with four columns; the first column reviews data from 4 weeks ago, the second column reviews data from 3 weeks ago, the third column reviews data from 2 weeks ago, and the fourth column reviews data from 1 week ago. Arranging information in this manner may make reviewing the information more efficient. The enhancement to this feature is the ability to display the period dates within the columns. Select the **Show Ranges** checkbox to display the start and end dates of the period in the column heading. Select the **Show End Date** checkbox to display the end date of the period in the column heading.

Scan a Report to Insert as Backdrop

If you have been in Report Maker trying to recreate an intricate report, you will want to learn this trick. If you have access to a scanner you may scan the report and insert it into the Report Maker canvas as a backdrop. This saves you time from creating all the text fields, frames, lines, and such! All you need to do is layer on the proper demographic and view fields. The trick to getting this to function is: 1) have a quality scanned image and 2) save the image in .jpeg format.

Report Tasks

Report tasks can be very useful to all staff. In the example of transfers, it is beneficial to create transfer tasks for the end users. Some facilities send different information for different transfer types. For example, when a resident is transferred to the hospital the medical records staff may be required to send: 1) the face sheet, 2) the physician orders list, 3) a MAR from the past 7 days, 4) a transfer summary report, 5) insurance information, and 6) advanced directives. Some of this might require photocopying in your current system but it does not have to. You can create a report task that pulls all 6 of these documents into one easy to print **Transfer to Hospital** button on an Access screen.

Another example is a resident being transferred back to their assisted living apartment. With this transfer the medical records staff may be accustomed to printing/copying: 1) the face sheet, 2) discharge orders, 3) a MAR for the past 7 days, and a 4) discharge summary report. Again, this can all be set to print with one touch of a button from an Access screen. To create a report task, follow the steps below.

1. Click on the green **Reports** icon.
2. Do not select a client and click **OK**.

3. Holding CTRL on the keyboard, select the appropriate Report Maker reports.
    - NOTE: MARs are not included in the Report Maker reports if you are using the electronic MARs.
4. When all the reports have been selected, click Tasks.
5. Click Save.
6. Name the task and click OK. Specify which sites and which user groups will need access to the task.
7. Find the task in the task list, highlight it, and click Edit.
8. Click Add under the Sign Tasks window to add a defined MAR to the report task.
    - Any date selections chosen here will be applied toward all reports in the task.