Report Maker (Advanced) – Session #2

Report Options

In the Report Maker toolbar, when you click onto the wrench/hammer icon, you are presented with the overall report options. This screen is detailed further below.

- 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 in the field to the right. The person listed there is the only one who can ever make changes to the report, unless the lock is removed by them.
- Margins: The numbers listed here will define the margins of the paper upon which the report will be printed.
- Size: The numbers listed here represent the size of the report grid space. These numbers may need to be adjusted if creating label reports or a resident receipt report.
- Options
    - Multiple Names per Report: To have more than one name display on a report, this may need to be selected. Without this checked, each name will display onto their own page.
    - Disable Footer: Select this box to disable the footer from the printed report.
    - Use Link Is Active: Not utilized in clinical reports. However, designates that that the charting should include anything from the linked resident as well as the name the report is being run on.
    - Copies: This field determines how many copies of the report will print. The default setting is 0. This may be needed when printing physician telephone orders where several copies are wanted for the record.
- Label: Utilize the below settings to adjust the sizing of a label report. You may need to look at the label packaging to determine what settings would be best suited here. Also specify the number of label columns and number of labels that should display in each column.
- Tasks
    - Common: A common task may be linked to a report so that the name list is paired down prior to running the report. This could be utilized if a report is setup for a specific provider and they only want their resident names to be listed, then a common task for their provider name can be linked to the report. Only one common task may be linked to a report. The common task itself will need to be created in the ID/Demographics screen before it can be linked here.
    - Sort: A sort task may be linked to a report so that the resident names are sorted in a specific order before the report is run. This may be useful is wanting a report to run in room order, rather than alphabetical. It can also be utilized to sort table groups or meal types together if running a tray card report. The sort

task itself will need to be created in the ID/Demographics screen before it can be linked here.

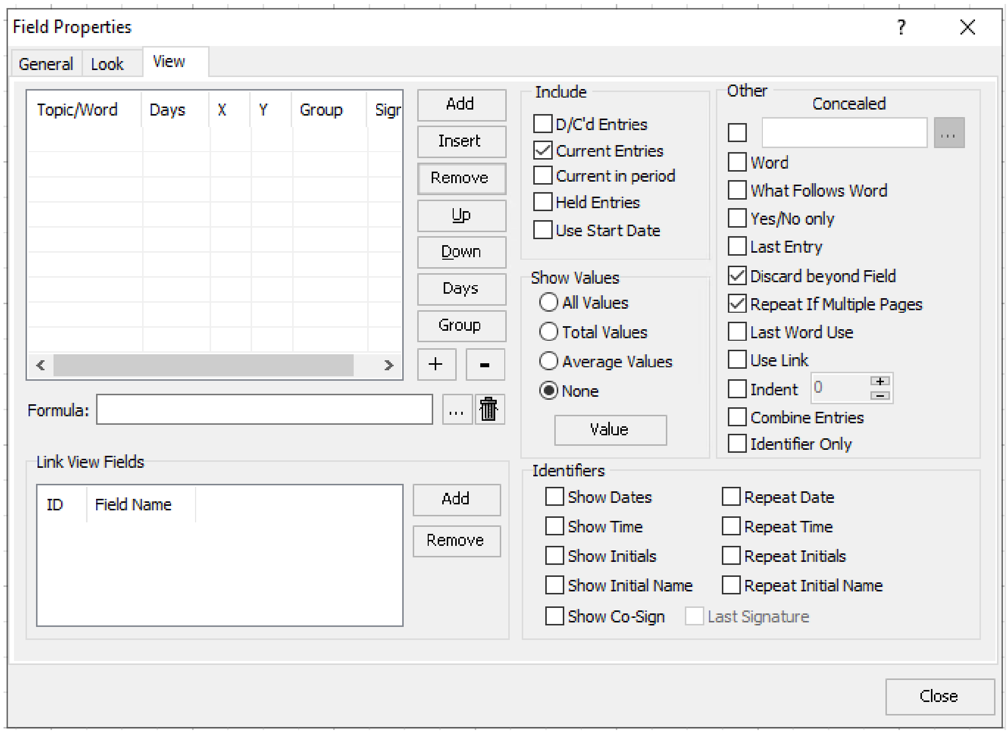
  - Email: This allows for an email word to be linked so that when a user previews the report, they have an Email button that is lit up. Once clicked onto, the previewed report(s) will send to the email addresses documented on each name that follow the word listed here.
  - Attach: This allows for a specific word to be linked so that when a user previews the report, they have an Attach button that is lit up. Once clicked onto, the previewed report(s) will attach into the medical record on each of the selected name(s).

- Report Type: There is an option for General, Graph, and Financial. This will determine the location of the report. By default, a new report will always be setup as General, but can be changed to Graph or Financial to change the location it can be found within.
- Orientation: Determines whether the report is in Portrait or Landscape.
- Active: A checkmark indicates that the report is active. If you would like to inactive a report that you currently have open on the screen, remove the checkmark in Active and save changes to the report.
- Dates: If default dates should be run for the entire report, those can be setup here. Options include Today, Current Week, Current Month, Day of Year, Last Week, and Last Month. In addition, there is an option for Force Selection, which will prompt the end user to select a date range before clicking OK to run the report.
- Time From/To: Allows the report to have an attached start and/or end time. This was programmed specifically for 12-hour shifts that overlap days (as setting a report to "Today" was not working effectively). Instead, a user could set the Time From at 7:00pm and the Time To at 7:00am to accommodate a 12-hour shift. Then setting the report to today will look at today but will also look at the specified time(s).
- Site/Group: Determines which sites/services and user groups have access to the current report.

Most Used Fields – More Detailed Look

View Field

In the Field Properties of a View field, there is an additional tab that has not yet been reviewed. This is the View tab. View fields are well suited when wanting to pull information for one resident. These field types are popular for populating heading information, such as room number, physician, code status, etc. They are also popular for displaying data such as notes, vital signs, etc.



The different options on this tab are detailed below.

- Topic/Word Box: This box is where the information that pulls to the report is defined. Topics and/or words are listed here by clicking onto Add to call the topic selection screen.
  - Days: Utilize Days to define only a specific number of days that data should display. Rather than set days here, you may also select *Force Selection* or a different default time period on the overall report options which then would apply to all fields on the report.
  - Group: This button allows a topic or word to be assigned to a group. This would be so that the all information in that group are treated as one. For example, if there are three different entries and you want only the last entry that was made of the three entries, then they may all be grouped together so that when Last Entry is selected, only the last entry of the group displays.
- Formula: Use this to add a formula which will then only pull the data in the Topic/Word box if the formula qualifies. For example, if needing the field to pull the Primary Contact's contact information, a formula with "PRIMARY CONTACT" can be added in and then the word "PHONE NUMBER" that is shared amongst all contact types can be populated in here and will only pull in if the formula qualifies.
- Include: Determines the type of entries to include in the column. Something must be checked here for the column to work appropriately. When a new column is created, the default is "Current Entries."
  - D/C'd Entries: Pulls discontinued entries to this field.
  - Current Entries: Pulls current entries to this field. This is the most common option selected.

- Current In Period: Pulls entries that are active during the selected time period. This may include entries that are still active or entries that have since been discontinued.
  - Held Entries: Pulls held entries to this field.
  - Use Start Date: Will pull only entries that have been documented since the resident's most recent Start Date. This feature is not utilized in majority of facilities so will not need to be adjusted.
- Show Values: If wanting to show values on a report, rather than words, or in addition to words, this may be utilized. This may be utilized if wanting to display values associated with an assessment.
  - All Values: Will list all the individual values.
  - Total Values: Will total all the values and only display the total.
  - Average Values: Will total all the values and average them based on the total number of entries. Will display the average.
  - None: This is the default setting. Unless a user specifically needs values listed, the dot can remain in None.
  - Value: Specify the value type (e.g., Scale, Graph, Score, Text) and column location if applicable (e.g., AA, AB, BC).
- Identifiers: Options here define if additional information regarding the entry display.
  - Show Dates: Will display the date the entry was entered/discontinued.
  - Show Time: Will display the time the entry was entered/discontinued.
  - Show Initials: Will display the initials of the user who entered/discontinued the entry.
  - Show Initial Name: Will display the full name of the user who entered/discontinued the entry.
  - Show Co-Sign: Will display any cosignatures that were made on the entry (e.g., physician cosigning a medication order or an administrator cosigning an incident note).
  - Last Signature: Will only display the most recent cosignature that was made, rather than displaying all. This is useful if an order is cosigned monthly, but only the most recent one needs to display on the report.
  - Repeat Date/Time/Initials/Initial Name: Without these checked an identifier will only display with each time there is a change. For example, if there are six entries all made on the date 10/31/2020, only the first entry will display the date to the left side of the entry. This is until the entry with 11/1/2020 starts, which then will identify that change with the date being displayed again. With this checked, all six entries would display the date.
- Other: Determines what will be displayed in each column of the report.
  - Concealed: This option allows for concealed words to print in the field. An example of concealed words is the side effects for medications. There are 16 different levels of concealment, so first you will need to determine what words

you may want to include that are concealed to ensure you select the correct level here.

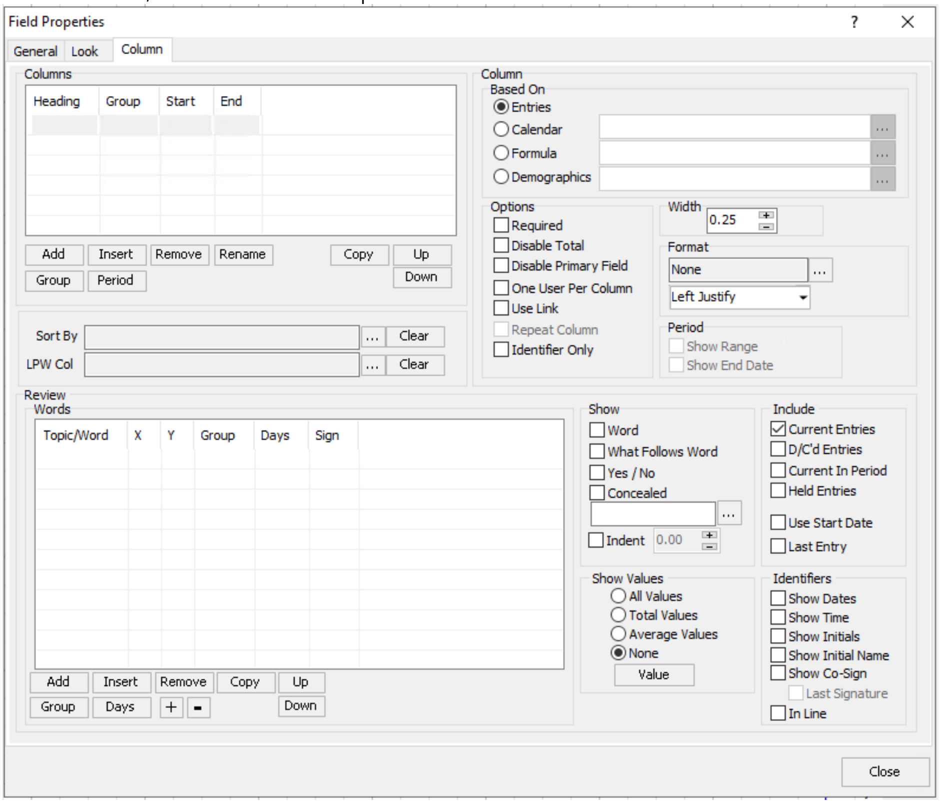
- Word: This option will pull the specific word itself from the documentation. Surrounding words or typed text would not be included. For example, if an entry was "INCIDENT: fall" and the report is pulling in only the word "INCIDENT" to *Review Words* and if *Show* is set to *Word*, only the word INCIDENT will display in the report.
- What Follows Word: This option will pull the text or button words which follow the word listed in *Review Words*. This does not pull the defined word itself, but only the items after it. Only the items that follow the defined word will display until the next word with "Question" checked on the options tab is found. For example, if an entry was: "INCIDENT: fall LOCATION: bathroom," and in the *Review Words*, only the word "INCIDENT" is located, with *What Follows Word* checked, only "fall" will populate and will stop once it finds the next question word in the entry, in this case, that is "LOCATION."
- Yes/No: This option will place an "X" within the field on the report when the content designated in *Review Words* qualifies.
- Last Entry: Will only pull the most recent entry that was made (rather than all entries that qualify).
- Discard beyond Field: This option will discard any data that does not fit in the field. This option must be selected if you also wish to select Repeat if Multiple Pages. If you do not wish to have information cut off, but rather continue onto subsequent pages, then she should remain unchecked.
- Repeat If Multiple Pages: This option allows the user to define which data should or should not repeat when the report generates to additional pages. This property only applies to reports that print to more than one page per client. If this option is selected, Discard Beyond Field must also be selected.
- Last Word Use: This option will pull the last time a word was used within an entry. This may be useful for capturing the last time something was evaluated.
- Use Link: Some clients in the system may have another client linked to his or her record (e.g., husband and wife may be linked). Select this checkbox if the report should pull information for the specified client as well as anyone linked to them.
- Indent: When this is selected, the report recognizes word properties for formatting. You can set the indent amount utilizing the +/- buttons in the box to the right.
- Combine Entries: When a question word is listed to pull information, which follows the word and the documentation has the question word used multiple times, the information can now be displayed from left to right on the screen, instead of top to bottom. For example, suppose a resident has the question word ALLERGIES used multiple times. Without this checked, the report would like those multiple entries from top to bottom, therefore taking up more space

in the report. However, using this property, those allergies can now be displayed from left to right on the report, ensuring that all allergies can be displayed on one page.

- Identifier Only: When this is checked, only the item(s) checked under Identifier will display in the column. For this option to work correctly, there must be data in Review Words, something checked under Show, as well as something checked under Include. Although only the identifier of the data will display in the field, the user still must tell the system which entry it should the identifiers from.

Column Field

In the Field Properties of a Column field, there is an additional tab that has not yet been reviewed. This is the Column tab. Column fields are well suited when wanting a report that displays multiple resident's data on one page or if needing to display multiple different data points on one resident, with each data point listed in their own column.



The different options on this tab are detailed below.

- Columns: This is where new columns may be added, edited within a column field. Each column will allow for all options listed below to be adjusted dependent on what is to be displayed. Utilize Add, Insert, Remove, and Rename to adjust the columns. In addition, utilize Up/Down to move a column to a different location.
    - Group: This option allows for the grouping of columns together for purposes of selecting topics/words for consideration (this may be especially useful for

reports with Yes/No columns). For example: Independent, Supervision, and Dependent 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 for each column, and click OK. All columns to be considered must have the same group number.
    - Period: This allows for a period to be designated per column. For example, in a weights report that displays the last 12 months of weights, each column can be its own period (e.g., 1 month-1 month, 2 months-2 months, etc. for each of the 12 months).
- Sort By: Use this to sort the report by a specific column. For example, if there is a column for room numbers and you would like the report to sort the names in room order, you may select to sort by that column. Click the picklist box to select the column that the report should use to sort by.
- LPW Col: LPW stands for Line Per Word. This gives you the ability to have words in the chosen column pull, even if there is not a resident charted with that word in it the day it is run. This feature is only utilized in a Room/Bed List report so that users may see empty rooms as well as occupied ones. Click the picklist box to select the column that should display all items in it no matter what.
- Review Words: This box is where the information that pulls to the report is defined. Topics and/or words are listed here by clicking onto Add to call the topic selection screen. Utilize Days to define only a specific number of days that data should display.
    - Group: This button allows a topic or word to be assigned to a group. This would be so that the all information in that group are treated as one. For example, if there are three different entries and you want only the last entry that was made of the three entries, then they may all be grouped together so that when Last Entry is selected, only the last entry of the group displays.
    - Days: Utilize Days to define only a specific number of days that data should display. Rather than set days here, you may also select *Force Selection* or a different default time period on the overall report options which then would apply to all fields on the report.
- Based On: This section determines what the column data will be based on. Whether the column should look at entries in the record, the calendar, a formula, or demographic data.
    - Entries: The column will pull information based on the words/topics located in the Review Words section. This will populate based on the date the entry was made. This is the default option.
    - Calendar: The column will pull information based on the words/topics located in the Review Words section. This will populate based on the date IN the entry. This will only work if the words located in the Review Words section are setup to be calendar words and have a date located in the entry.
    - Formula: The column will pull information based on the results of the formula that are put into place. A new formula may need to be created or an existing

one can be linked. If the column qualifies based on the attached formula, a user will still need to specify what should display on the report by placing those items into the Review Words section. If the formula is met, the items in Review Words will display. If the formula is not met, nothing will display.
    - Demographics: This column will pull information about the selected name's demographics. Choices for this field include items such as: Full Name, DOB, Sex, Age, Medicare Number, Floor, Unit, etc.
- Options: Located here are additional options that can be utilized in any necessary columns.
    - Required: When this is checked, this means that information will only pull to the report if the items in this column qualify. For example, if a column for "Blood Pressures" is set to required, the report will only display data on that resident if they have a "Blood Pressure" documented.
    - Disable Total: When checked, this will disable the totaling feature for the column. If the report is setup to have the "Total" option checked on the Look tab, there may be some columns that do not need to total and therefore could be disabled. For example, if a report totals the number of activities attended/not attended, I may disable the total on the "Date of Activity" column as I do not need a total of all the entries.
    - Disable Primary Field: If the Primary field is checked on the Look tab, that means that the report is date sensitive and will only display data found with the selected date range. However, there may specific columns on the report that the user would like to show no matter what the date range selected. These columns should have Disable Primary Field checked. An example of this is if one of the columns populates with Room or Primary Physician.
    - One User Per Column: When this is checked, only one user will display in each column. This may useful if tracking the entries made by specific users.
    - Use Link: Some clients in the system may have another client linked to his or her record (e.g., husband and wife may be linked). Select this checkbox if the report should pull information for the specified client as well as anyone linked to them.
    - Repeat Column: When this is checked, this means that information in this column will repeat for every row of information, regardless of other settings on the report, such as "Line Per Entry." This feature is beneficial when the report is exported so that resident data points may all be attached with identifiers, such as resident room. One Line Per Entry must be active in the Look tab in order to be able to select this option.
    - Identifier Only: When this is checked, only the item(s) checked under Identifier will display in the column. For this option to work correctly, there must be data in Review Words, something checked under Show, as well as something checked under Include. Although only the identifier of the data will display in

the field, the user still must tell the system which entry it should the identifiers from.

- Width: Set the width (in inches) for the highlighted column. A width must be individually set for each column. You can type in a number or utilize the +/- buttons.
- Format: The data may be formatted to appear in text money format, the decimal may be dropped, and/or values may be right, left, or center, justified.
- Period: Columns have the option of displaying information from different time periods in separate columns. When reports are viewed, it may become difficult for the user to determine which column is pulling information from which time period. To make the information clear, there are two options that can be considered: Show Range and Show End Date.
- Show: Determines what will be displayed in each column of the report.
    - Word: This option will pull the specific word itself from the documentation. Surrounding words or typed text would not be included. For example, if an entry was "INCIDENT: fall" and the report is pulling in only the word "INCIDENT" to *Review Words* and if *Show* is set to *Word*, only the word INCIDENT will display in the report.
    - What Follows Word: This option will pull the text or button words which follow the word listed in *Review Words*. This does not pull the defined word itself, but only the items after it. Only the items that follow the defined word will display until the next word with "Question" checked on the options tab is found. For example, if an entry was: "INCIDENT: fall LOCATION: bathroom," and in the *Review Words*, only the word "INCIDENT" is located, with *What Follows Word* checked, only "fall" will populate and will stop once it finds the next question word in the entry, in this case, that is "LOCATION."
    - Yes/No: This option will place an "X" within the field on the report when the content designated in *Review Words* qualifies.
    - Concealed: This option allows for concealed words to print in the field. An example of concealed words is the side effects for medications. There are 16 different levels of concealment, so first you will need to determine what words you may want to include that are concealed to ensure you select the correct level here.
    - Indent: When this is selected, the report recognizes word properties for formatting. You can set the indent amount utilizing the +/- buttons in the box to the right.
- Show Values: If wanting to show values on a report, rather than words, or in addition to words, this may be utilized. This may be utilized if wanting to display values associated with an assessment.
    - All Values: Will list all the individual values.
    - Total Values: Will total all the values and only display the total.
    - Average Values: Will total all the values and average them based on the total number of entries. Will display the average.

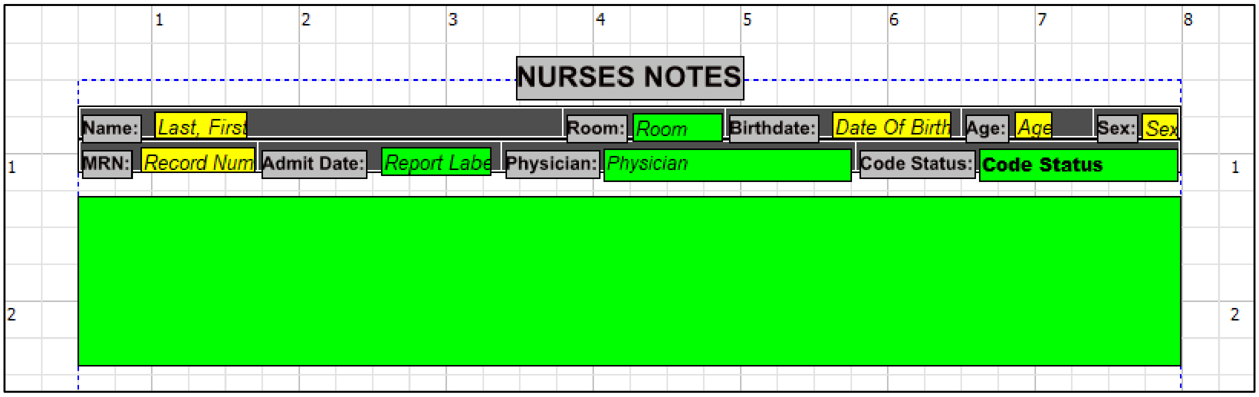
  - None: This is the default setting. Unless a user specifically needs values listed, the dot can remain in None.
  - Value: Specify the value type (e.g., Scale, Graph, Score, Text) and column location if applicable (e.g., AA, AB, BC).
- Include: Determines the type of entries to include in the column. Something must be checked here for the column to work appropriately. When a new column is created, the default is "Current Entries."
  - Current Entries: Pulls current entries to this field. This is the most common option selected.
  - D/C'd Entries: Pulls discontinued entries to this field.
  - Current In Period: Pulls entries that are active during the selected time period. This may include entries that are still active or entries that have since been discontinued.
  - Held Entries: Pulls held entries to this field.
  - Use Start Date: Will pull only entries that have been documented since the resident's most recent Start Date. This feature is not utilized in majority of facilities so will not need to be adjusted.
  - Last Entry: Will only pull the most recent entry that was made (rather than all entries that qualify).
- Identifiers: Options here define if additional information regarding the entry display.
  - Show Dates: Will display the date the entry was entered/discontinued.
  - Show Time: Will display the time the entry was entered/discontinued.
  - Show Initials: Will display the initials of the user who entered/discontinued the entry.
  - Show Initial Name: Will display the full name of the user who entered/discontinued the entry.
  - Show Co-Sign: Will display any cosignatures that were made on the entry (e.g., physician cosigning a medication order or an administrator cosigning an incident note).
  - Last Signature: Will only display the most recent cosignature that was made, rather than displaying all. This is useful if an order is cosigned monthly, but only the most recent one needs to display on the report.
  - In Line: Will show the identifiers in line with the entry, rather than placing them on their own line.

Example Reports

For each of the below reports, I will include the field types in the report, a screenshot of the report setups as well as key setup points to be aware of when creating reports such as these.

All Nurses Notes (48 hrs.)

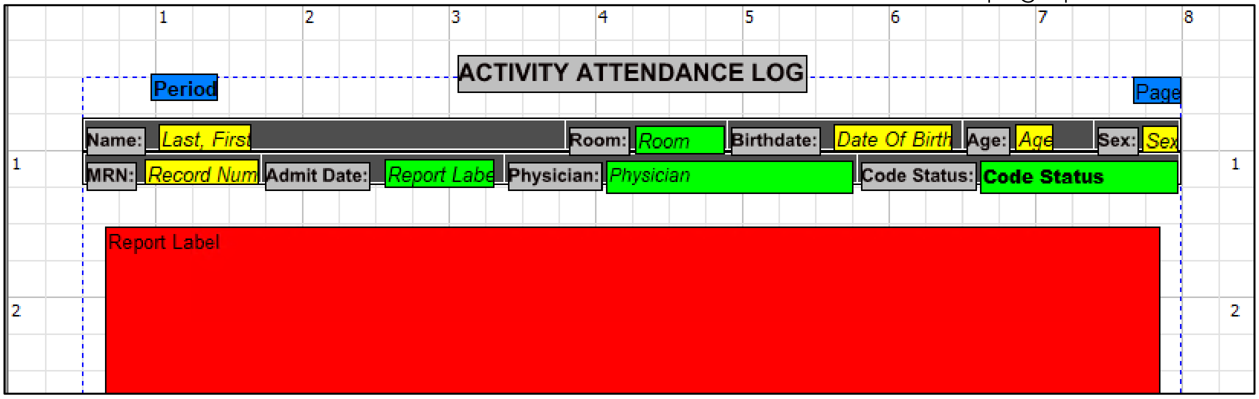
This report we will utilize one large view field as we will have one page per resident.



- Field types utilized in this example: Frame, Text, Demographics, View.
- The view fields for the following have **Primary Field** on the **Look** tab <u>unchecked</u>: Admit Date, Room, Physician, and Code Status.
- The view field for nurse's notes has the following setups:
    - On the **General** tab: *Variable to content (Height)* is checked.
    - On the **Look** tab: *Primary, Line After Topic, Frame, Row/Entry*, and *Chronological* are all checked.
    - On the **View** tab: the topic/word box includes all topics in the Nursing section as well as some in the MAR/TAR section. Because only the past 48 hours should display, all topics must be set to *2* in the *Days* column. *Current Entries, Show Dates/Time/Initial/Initial Name* are all checked.

Activity Attendance Log

This report we will utilize a column field as we will have several columns of data per resident. However, for the headers, we will utilize view fields as we will still have one page per resident.



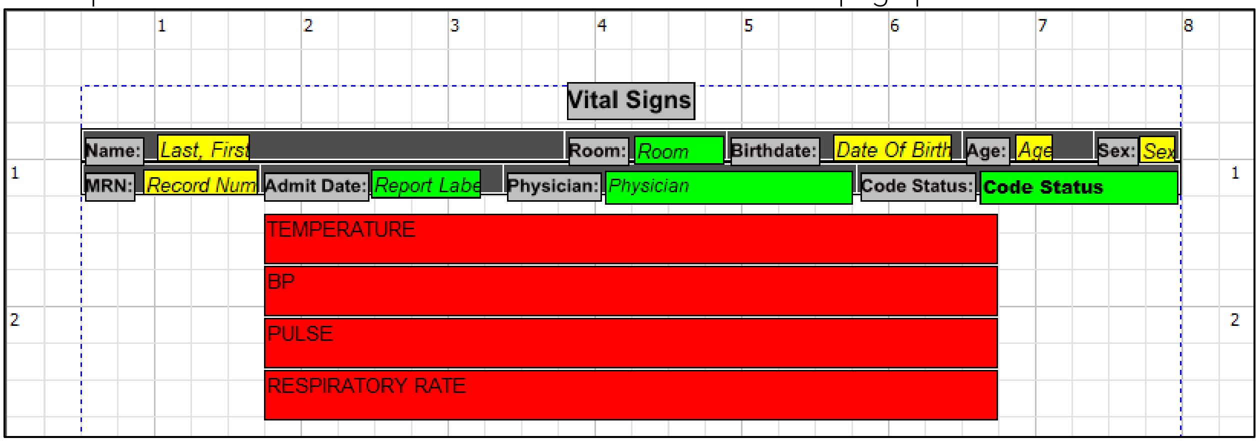
- Field types utilized in this example: Frame, Text, Demographics, System, View, Column.
- The view fields for the following have **Primary Field** on the **Look** tab <u>unchecked</u>: Admit Date, Room, Physician, and Code Status.
- The column field for the activity attendance has the following setups:
    - On the **Look** tab: *Primary Field, Isolate, Chronological order, One Line Per Entry, Row*, and *Percentage* are all checked.

- On the **Column** tab: there are four different columns (titled: *Date*, *Activity Attended, Activity Not Attended,* and *Participation*). All four columns have Based On set to *Calendar* and are based on the *Date* column. This is because we want the entries to search for the date IN the entry (which is what calendar does) rather than the date OF the entry. All four are also set to *What Follows Word* and *Current Entries*. The Date and Participation columns are also set to *Disable Total* as we do not want them factored into the percentage of activities attended (only the two middle columns should be set to factor into this).

- In the report **Options** icon, in the Dates box, the option for *Force Selection* is checked.

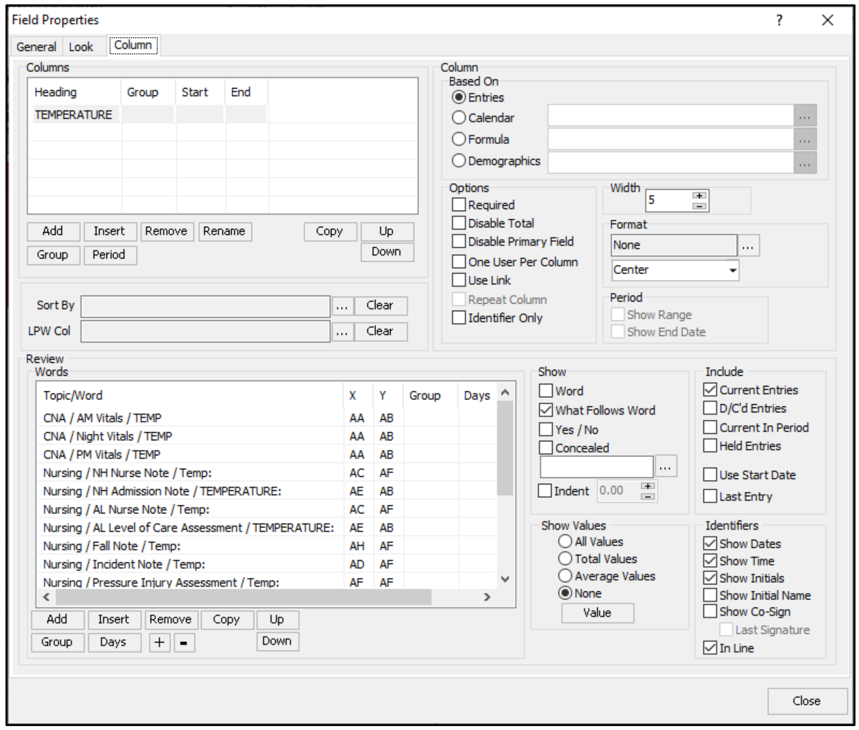
All Vital Signs

This report we will utilize several view fields as we will have one page per resident.



- Field types utilized in this example: Frame, Text, Demographics, View.
- The view fields for the following have **Primary Field** on the **Look** tab <u>unchecked</u>: Admit Date, Room, Physician, and Code Status.
- Each of the four column fields are setup the exact same, except for that they will be pulling a different set or words dependent on which vital needs to display. Here is what is setup on each column field:
  - On the **General** tab: *Variable to content (Height)* is checked as well *as Skip if Blank*. The field name of the vital sign type (e.g., TEMPERATURE, PULSE) is filled in and the *Header Font* section has a Color specified just to add some extra to the report field headers.
  - On the **Look** tab: *Primary Field, Isolate*, and *Topic Order* are all checked.

- On the **Column** tab: There is only one column in *Heading*, which is titled with the vital sign type (e.g., RESPIRATORY RATE, BLOOD PRESSURE). In the *Review Words*, all the vital sign words are listed. The column is set to *What Follows Word, Current Entries* and has *Show Dates/Time/Initials* checked as well as *In Line*. Width of column is 5 and format is set to *Center*.



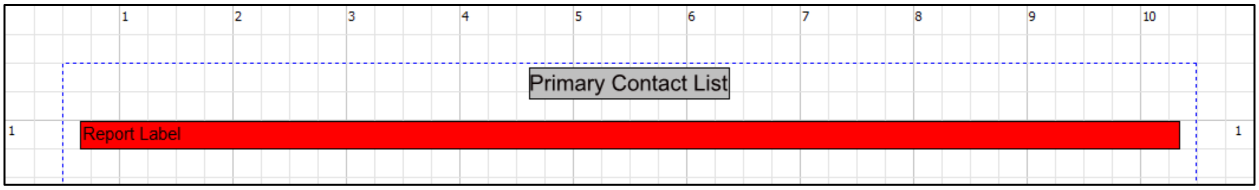
Vital Signs

Name: *Edwards, Jack C*		**Room:** *110*	**Birthdate:** *03/26/1923*		**Age:** *97 Yrs*	**Sex:** *M*	
MRN: *54*	**Admit Date:** *03/30/2020*	**Physician:** *Dr. James Black*		**Code Status: DNR**			

TEMPERATURE			
10/24/2020	10:10:22	HEB	98.6 °
11/10/2020	16:01:21		98
BLOOD PRESSURE			
11/10/2020	16:01:21		136/68
10/19/2020	17:05:28	HDC	135/64
10/24/2020	10:12:04	HEB	142/80
10/26/2020	11:56:36	HDC	145/82
PULSE			
10/24/2020	10:10:22	HEB	60
11/10/2020	16:01:21		58
10/19/2020	17:05:29	HDC	61
10/26/2020	11:56:37	HDC	62
RESPIRATORY RATE			
10/24/2020	10:10:22	HEB	16
11/10/2020	16:01:21		21

Emergency Contact List for Entire Building

This report we will utilize a column field as we will have several residents on one page.



- Field types utilized in this example: Text, Column.
- The column field has the following setups in place:
  - On the **General** tab: *Variable to content (Height)* is checked as well as *Skip if Blank.*
  - On the **Look** tab: *Primary Field, Isolate, Row/Entry, Topic Order, Show Names Without Data, One Line Per Name*, *Export*, and *Space After Entry (1)* are all checked.
  - On the **Column** tab:
    - There are five columns listed in Heading (Resident Name, Primary Contact Name, Primary Contact Relationship, Primary Contact Phone, Primary Contact Email).
    - The first column (Resident Name) is populating based on *Demographics* and lists the residents full name.
    - The next four columns are all set to Based On *Formula* as we want to only display the contact information IF the contact is the primary one. The formula setup is shown below and is attached to all four columns. The columns also have *What Follows Word* and *Current Entries* checked. In the *Review Words* section, we are populating the words from the Face Sheet/Contacts topic. The words are CONTACT NAME, RELATIONSHIP, PRIMARY PHONE, ALTERNATE PHONE 1, ALTERNATE PHONE 2, and EMAIL.