

Report Maker (Troubleshooting) - Session #3


In this session, we will review different problems that may be reported to you and steps you can take to troubleshoot the potential problem.

Reported Problem & Potential Solutions

Data is displaying outside of the selected date range. Or data is not displaying once a date range has been selected and should be.

- Check the fields that are not populating correctly and be sure that on the *Look* tab, Primary Field is either checked or not checked. Having Primary checked means that the field will look at the date ranges selected by the end user. That means that if data is displaying outside of the selected date range, that Primary Field must not be checked on that field. However, the opposite problem could also exist, data no longer displays when/if a date range is selected. This means that this field most likely needs the Primary Field unchecked. You may also select Disable Primary Field on a specific column in a column field report.

No names or data is displaying when I run my report, it just runs and show the heading of the field, but nothing else. It is a column field report.

- When you have the report preview up, check to be sure there are not more pages listed than the first one you are on. For example, if the first page you are on is showing no residents, but you notice that the preview states that there are multiple pages (e.g., 1/6 or page 1 of 10) then we know exactly what the issue is (each resident is pulling to their own page and should not be). To correct this, open the report and click onto the  report *Options* icon and place a checkmark in Multiple Names per Report. While in the *Options*, click into the Dates button and make sure that it doesn't have a date setting in here that it should not have.
- Next would be to check to ensure that the location you have the report linked to is correct and that entries exist in that location. Once in the report, open the Column field and look through each of the columns to see what is listed under *Review Words*. If you see that it is linked up correctly, it wouldn't hurt to go into a View screen and search for the charting to be sure that there are entries in the same location as where the report is linked.
- Next check to see if any of the columns are set to Required on the Column tab. If a field is set to required, then nothing will pull into the report for that resident if that one column isn't met.

All the data in my column field report is jumbled together.

| Primary Contact List | | | | |
|----------------------|----------------------|------------------------------|------------------------------------------------------|-----------------------|
| Resident Name | Primary Contact Name | Primary Contact Relationship | Primary Contact Phone | Primary Contact Email |
| Smith, John E | Ann Smith | daughter | (P) 365-444-1125 | kevin@gmail.com |
| Smythe, Jackson E | Jesse Milton | son | (P) 608-429-3475 | jimmywayne@yahoo.com |
| Spears, Britney | Kevin Federaline | husband | (P) 346-637-3443 (mobile) | |
| Thomas, Martin T | Susan Thomas | daughter | (P) 608-654-3210 (home) (1) 608-574-9876 (mobile) | |
| Timberlake, Justin | Jessica Biel | wife | (P) 587-485-1875 (home) | |
| Wayne, John W | Jim Wayne | son | (P) 546-545-6146 (1) 545-415-2132 | |

- This means that the Column field does not have anything selected in the Look tab under Process Options. With a report such as this, typically One Line Per Name would be most popular so that each resident is on their own line. Or you may also choose to do One Line Per Entry so that each contact is on their own line.

A view field is cutting off some of the entry.

- This would mean that Discard Beyond Field is checked on the View tab. Keep in mind that without this checked, the report will generate as many pages as needed to populate all the data from the entry(ies). This may make a report run onto seven pages, even though you had anticipated it to just be a one-page report (e.g., a CNA Kardex report). That is typically why this checkmark will be in place is that getting too many pages is not ideal, however missing data is also not ideal. We recommend sizing fields appropriately to accommodate all resident entry types. An alternate option is to turn the report into one with the Variable to content (Height) in place. However, this option may not suffice for all report types. It does lend itself nicely to Physician Orders, Diagnosis, and any Notes/Assessments Reports.

All the entries are showing in a field, but I only want the most recent one to display.

- If you only want the most recently charted entry to display in the field, then place a checkmark in the Last Entry option on the Column/View tab. Keep in mind that this will display the last entry documented based on the date it was documented, not the date in the entry.

I have a column field setup to pull multiple entries, so it is setup to *One Line Per Entry*, however every time I run the report, it keeps pulling blanks for the resident's room number.

- If you have multiple names per report but are choosing to process it based on One Line Per Entry, then you may run into some fields that display either blank or are pulling onto separate lines. As you can see, the resident's room pulls to one line and then their emergency contact information pulls to separate lines. We would prefer that

instead the resident's room number pulls to each line so that this can be easily exported to Excel for a mail merge. Keep in mind that pulling One Line Per Entry for any column report will separate each entry out. As room number and contacts are in different topics, this also means they are in separate entries. This means they can never pull to the same line without utilizing the Repeat Column feature. To determine what words are located within an entry, utilize the View Screen and pull up the entries. In the Control screen, place a checkmark in Line Between Entries so you may easily tell when an entry will split within a report.

| Resident Name | Room # | Contact Name | Contact Relationship | Contact Phone |
|-------------------|--------|---------------------|----------------------|--------------------------------------|
| Edwards, Mary J | 212-1 | | | |
| | | Charles Edwards | husband | (P) 608-555-8485 |
| | | Gretchen Hopper | daughter | (P) 608-555-9686 |
| Jefferson, Thomas | 107-2 | | | |
| | | Christine Jefferson | daughter | (P) 847-216-7736 |
| Morris, Luke J | 103-1 | | | |
| | | Joan Morris | wife | (P) 608-552-2222 (1) 608-888-8888 |
| | | Karrie Fritz | daughter | (P) 608-774-5475 |
| | | Henrietta Morris | sister | (P) 920-517-5984 (1) 608-089-4454 |

- In the *Column* tab, locate the column you need to populate to each "entry" line. Then place a checkmark in Repeat Column. This will then repeat the information in that column within each of the different "Lines" that display. This option is only available in One Line Per Entry is being utilized. Another item you may need to check is Disable Primary Field. In the above example, we do not need to as this report never has dates ran with it, however if we were instead running a report on all falls within a specific time frame, then we would have to disable the primary field on any columns that do not fall within the selected date range.

There are some fields on the report that display on all pages, whereas others do not. I want all fields to repeat on every page that is created.

- Demographics and View fields have options available for Repeat If Multiple Pages. Make sure this is checked if you would like this data to repeat on every page the report generates.

Not all the text I want to populate into the report is pulling in. I have added the word "Fall" into the Review Words section but want the entire entry to display on the report.

- In the *Look* tab of the field not displaying enough data, remove the checkmark from Isolate. Remember that Isolate means that only the word(s) listed in the Column/View tab will display, rather than the entire entry.

I only want residents who have certain items charted on them to populate into the report.

- There are a couple of different ways to accomplish this. One of those ways would be to attach a Common Task to the report *Options*. This will common the names down prior to running the report. For example, if you would like only resident's who have the physician named Dr. Jones to populate onto the report, a common task can be created and linked to the report.
- Another way to accomplish this is to make a column within the column field set to Required. This means a name will not populate into the report at all unless they have whatever item is listed in the column set to required. Sometimes you may want names to only populate if they have any of several columns. You may check Required on all columns, which means that any of them will need to be populated prior to the name populating the report. This does not mean that *all* columns with Required checked must be met prior to the name populating, but rather *any* of the columns must be met.

I am getting duplicate pages where almost everything is the same, but it should only be a one-page report (e.g., a Face Sheet report).

- This will typically happen on Face Sheet reports or CNA Kardex reports where there are several different view fields. This is because one of the view fields does not have Discard Beyond Field checked, so it is spilling over to a second page. Sometimes it is difficult to find the one field causing the problem. We recommend printing all pages of the report on one name that you know is spilling onto subsequent pages and comparing each field until you find one that is not identical on all pages. For example, if Name, DOB, and MRN are on all pages, then they are not the problem as they are just repeating the same data. But, if the beginning of an emergency contact's entry is on page 1 and it continues onto page 2, then you have found the problem field. This field will either need to be made bigger so it may fit more text or should have Discard Beyond Field checked so it does not spill over onto subsequent pages. Keep in mind that utilizing this option will then cut off any data that does not fit into the field.

A user has reported that they cannot access the report. When they click onto the easy button, nothing happens for them.

- If a user clicks onto a button and it does nothing (what we call a "dead" button), you will want to start by viewing the setups of that button to ensure you know the report/task name. Once you have that, you can open it up within report maker. Click onto the report *Options* icon and then onto the Site/Group button. Once in here, click Add to the right-hand side of the column you are needing to adjust.

In a column field, how do I know what to base my column on? There are options for Calendar, Entry, and Formula and I am unsure which is necessary for my needs.

- Often, the option for Entry will work with almost all entry types. There are only certain situations where utilizing calendar or formula may be beneficial.
- Entries: This will populate information based on the date of the entry. This is the default setting and most often will work with any data.
- Calendar: This will populate information based on the date in the entry (if there is one). This will only work if you are entering a word into the Review Words section that is setup as a calendar word. If it is not setup as a calendar word, it can be changed to be one, however typically calendar words will have a date somewhere in the entry to work appropriately. Most commonly, fields such as Room # or Occupancy Status would be set to calendar.
- Formula: This will populate information based on the whichever formula you put into place. This may be necessary if you only want to data to populate based on an algorithm of specific data. For example, only populate the resident's contact information if it's the primary contact person.

The report I have continually shows data only for a certain time frame, even though I do not have one selected when I run the report.

- There are a couple locations to check when noticing that data is not pulling based on the time frame you are expecting it too. Start by clicking into the report *Options* and select the Dates button. If this is set to No Dates, go to the next bullet point.
- Click into the field(s) that appears to be showing data only for certain date ranges. In a column field, there may be a Period set to the columns or within each column, there may be Days set in the Review Words section of the screen. You may have to scroll over to the right to see if there are days set. In a view field, there is also a Days option. You may have to scroll over to the right to see if there are any days set.

More detailed explanation of Word vs. What Follows Word.

- If there are entire topics listed, whether you have *Word*, *What Follows Word*, or *Isolate* checked/unchecked, will not matter as you are asking for the entire topic no matter what is located within there.
- Word will only pull the specific word itself. It will not pull in anything that surrounds this word (such as additional free text a user may have added into the entry).
- There are instances where a user pulls in specific words but pulls in all types of words that come together in the same entry. Placing a checkmark in Word will work appropriately. However, sometimes a user also is wanting the free text to populate, and there is not a way to do pull multiple answer words with using Word and What Follows Word. This will cause duplicates to display in the report (as seen in the example

| DRESSING |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>I dress: I can dress myself but I need help tying my shoes and I need help with buttons and zippers I need help with buttons and zippers I need help tying my shoes and I need help with buttons and zippers</p> |

here). In this instance, we would instead recommend pulling in a question/heading word and turning on What Follows Word.

- What Follows Word will pull any answer/button words as well as any free text words up until it finds the next question word in the entry. Once the next question word is found, the field knows to stop. In the example entries below, if a report is setup to pull Care Plan Approaches and the word "I need my nurses to ---" is populating to the report with What Follows Word checked, only the highlighted items will display in the report. That is because once the report sees the next question word in the entry ("I need my aides to ---") then the field will stop.

| | |
|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>I need my nurses to --- I need my aides to --- I REPOSITION IN BED: I TRANSFER:</p> | <p>assess my functional level monitor my medication use encourage me to use safety devices with me and work towards my ADL goal give me time to do tasks encourage me to be as independent as possible with my cares with the help of 1 person not bearing my weight with the help of 1 person not bearing my weight</p> |
|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

More detailed explanation of Current Entries vs. Current in Period.

- Current Entries will show any entries that remain active at the time the report is run. In addition, if the report is run with a date range, only entries that remain active AND **were written within that date range** will display. This means that if an entry has since been discontinued, even though it was written within the date range, it will not display as it is no longer an active entry.
- Current in Period will show any entries that were current during the selected time frame, even if they have since been discontinued. Keep in mind, **this does not require that the entry was written within the date range**. This just means that the entry was active (meaning it was not in a discontinued status) during the selected date range. Users sometimes find this confusing because if you run a report for December 2020, you will see entries that were written outside of this month. That's because the entries remained active during the selected time frame.

Quick Reference RM Troubleshoot Checklist

Make sure to check that there is an entry in place, and it is in the correct format (utilize **Free Text Highlighter to ensure a word was not free typed)**

| Report Options | Field Properties (Look Tab) | Field Properties (Column/View Tab) |
|------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none">• Dates• Multiple Names per Report• Site/Group | <ul style="list-style-type: none">• Primary Field• Master Field• Isolate• Process Options (Column fields) | <ul style="list-style-type: none">• Based On (Column fields)• Include:<ul style="list-style-type: none">• Current Entries• Current in Period, D/C'd Entries• Last Entry• Show:<ul style="list-style-type: none">• Word• What Follows Word• Options (Column fields):<ul style="list-style-type: none">• Required• Disable Primary Field |