

Reports Guidance

**Videos will be blurry when they first open. Press pause and then start; the video will reload and be clear.*

Reporting Module Overview

- **Report Buttons Overview:** https://drive.google.com/file/d/1TMTYkR28l_Ulr2v7QUVbaiRiLQbo7tiw/view?usp=sharing
- **Report Sections Overview:** https://drive.google.com/file/d/1ZreNd2n_PN75faE0U1OqzyaksVA8F6o/view?usp=sharing
- **Building a Report Part 1:** <https://drive.google.com/file/d/1U1qbYqd1ObmGIJhzRUze0ool0AemttvN/view?usp=sharing>
- **Building a Report Part 2:** <https://drive.google.com/file/d/1NcVKLDaBAdjdpovrmKbo4hvLiBMe18FX/view?usp=sharing>

How to Run a Client Roster Report vs. Worker Caseload

- **Video:** <https://drive.google.com/file/d/1Rt7l8CXFYc07XcNgevouoSveUwv2g4RJo/view?usp=sharing>
- **Breadcrumbs:** Reports > Clients > General > Client Roster
 - This report pulls a list of staff assigned as primary worker
- **Breadcrumbs:** Reports > Clients > General > Worker Case Loads
 - This report pulls a list of staff assigned as primary worker and as direct staff assignments

Client Services vs. Service entry

- **Video:** <https://drive.google.com/file/d/1IOAO4BTZuGHCCQgPgMzIlpOOn77DM-P/view?usp=sharing>
- **Breadcrumbs:** Reports > Clients > Services & Treatment > Client Services
- **Breadcrumbs:** Reports > Clients > Services & Treatment > Service Entries
 - The main difference between these two reports is that the Service Entries report preview displays the date that the service was entered in to myEvolv.
 - Both reports pull the same information to an Excel document.

How to Run a Progress Notes Report

- **Video:** <https://drive.google.com/file/d/1E1Fveak9TDGwvextYYfxHuln6nsGwMcg/view?usp=sharing>
- **Breadcrumbs:** Reports > Clients > Services & Treatment > Progress Notes
 - This report is helpful to view a selection of progress notes entered for a client for a period of time

How to Run a Treatment Plan Report

- **Tx Plan Video:** <https://drive.google.com/file/d/1KmFBQsY534VNzq-ZbDXgQQU6roTIWxnn/view?usp=sharing>
- **Plan Goals Video:** <https://drive.google.com/file/d/1yNHnNuiMZXmfz6cxakgwgYCbt7U-TxA8/view?usp=sharing>
- **Breadcrumbs:** Reports > Clients > Services & Treatment > Client Treatment Plans

How to Run a Missing Diagnoses Report

- **Video:** <https://drive.google.com/file/d/1czl23Kn9k7l4LRXcU-3UKGyTCNVJYzx6/view?usp=sharing>
- **Breadcrumbs:** Reports > Clients > General > Missing Diagnoses

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- This report helps identify clients without a primary diagnosis on file for a specific program or the agency.

How to Run a Billable Services not Billing Report

- **Billable Client Services not Billing:** <https://drive.google.com/file/d/1clsFBzE2b2Abu4xE8zycoZFyMzbnhVN/view?usp=sharing>
- **Billable Client Services:** https://drive.google.com/file/d/18Cs3xz3rSRp2WZei2c0ApTgtVhGv7_IT/view?usp=sharing
- **Breadcrumbs:** Reports > Clients > Services & Treatment > Billable Client Services
 - This report helps identify why services are not billing due to: duration issues, services not submitted or approved, services not marked as no show, services that could have been entered as case management vs. individual progress notes, etc. (*see screenshot below*)
 - Additional parameters can be added such as Program.

How to Run a Benefit Assignments Report

- **Video:** <https://drive.google.com/file/d/1D24Am5DL4abBKZL8t9TAq6b9VO12FYD9/view?usp=sharing>
- **Breadcrumbs:** Reports > Clients > General > Benefits Assignments
 - This report is helpful to identify clients without a benefit assignment on file or clients with a specific type of benefit assignment.

How to Run a Client Workflows (*scheduled tasks*) Report

- **Video:** https://drive.google.com/file/d/1xUPYQZK_SuSHKvynSp8nuucgWFeltcBK/view?usp=sharing
- **Breadcrumbs:** Reports > Events > Work Flows > Clients
 - This report is helpful for supervisors and clinicians to keep track of their assigned tasks and/or tasks for specific client services to ensure client records are in compliance.

Staff Productivity vs. System Usage Report

- **Video:** <https://drive.google.com/file/d/1zsrvyv41X1O2S1sB6JPyfVKL0pVzGabS/view?usp=sharing>
- **Breadcrumbs:** Reports > Clients > Services & Treatment > Staff Productivity
 - Staff Productivity Report allows you to check what percentage of service entry/ticket durations are billable for a staff member, program, facility, etc.
 - System Usage Reports allow you to view when and where a staff clicked in myEvolv

Adding Frequent Report Breadcrumbs to myFavorites

- **Video:** <https://drive.google.com/file/d/1KRXJFpivSgkRhtWVtGVdmMBa3bden6F8/view?usp=sharing>

How to Set Up Report Queries and Use Saved Queries from Widget

- **Video:** https://drive.google.com/file/d/1Rw_oOF0lxDfIE5LO89rsftHhPTo5987x/view?usp=sharing

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Typical Billable Client Services Not Billing Report:

Reports > Clients > Services & Treatment > Billable Client Services

Client Services Service Entries Progress Notes Progress Notes Entries Attendance Client Served Staff Service Overlap Client Service Overlap Staff Productivity Services Changed After Billing Billable Client Services Payable Services Authorizations

Preview Cancel Excel CSV Display SQL Refresh Form Info Schedule Save Query Use Queries Delete Queries Help

↑ Dates

From Date: 01/01/2021 Through Date: 03/31/2021

↑ Selection

Report Selection*: Break by Client

↑ Parameters

Billed: Not Billed: Approved: Submitted/Not Approved:

Not Submitted: Services not indicated as 'do not bill': Services indicated as 'do not bill': Include Incident-To Information:

Show only non-billed service on same day as billed: Agency: Rainbow Treatment Center

Parameters

Parameter	Not Equal	Value*	Actions
Plan/Contract to Client	<input type="checkbox"/>	AMCCCS - AMCCCS Billable	Actions
No Show	<input type="checkbox"/>	No	Actions
Service	<input checked="" type="checkbox"/>	Case Management	Actions
Service	<input checked="" type="checkbox"/>	Case Management (M)	Actions
Service	<input checked="" type="checkbox"/>	Case Management (S)	Actions
	<input type="checkbox"/>		Actions