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/1TMTykR28I_UIr2v7QUVbaiRiLQbo7tiw/view?usp=sharing
- **Report Sections Overview**: https://drive.google.com/file/d/1ZreNd2n_PN75faE0U1OqyzyaksVA8F6o/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/1Rt7l8CXFYc07XcNgvouoSveUwv2g4RJo/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/1lOAO4BTZuGHCCQgPgMzIILpOOn77DM-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/1E1FveaK9TDGwevxtYYfxHuln6nsGwMcg/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/1czI23Kn9k7l4LRXcU-3UKGyTCNVJYzx6/view?usp=sharing
- **Breadcrumbs**: Reports > Clients > General > Missing Diagnoses

- 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/1clsFlBzE2b2Abu4xE8zycoZFyMzbnhVN/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/1KRXJFpjvSgkRhtWVtGVdmMBa3bden6F8/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

Reports Guidance

Typical Billable Client Services Not Billing Report: