

## #54 - CYMS Training Guide – Provider Reports (10.3 – Updated Nov 2011)

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### Basic Concepts

All reports in CYMS can be run multiple ways. Selection criteria include different locations, dates, times, sorts, detail/summary, ages/grades etc. The best way to “learn” about reports is to jump in and experiment with them. You can’t hurt anything in the database by running a report. Start with a small selection of data where you can validate the results – try different settings and views until you find the look you need for the task at hand!

You can press **F1** from any screen in CYMS to obtain field level help.

Before running a report it is extremely important to understand the concept of **Range and Browser vs. Browser Only**. Refer to CTG-15-CORE-Reports Range and Browser for more information.

#### Important Notes:

- Many of the reports in the **Staff and Provider** modules work the same. In these instances, the Staff Reports have been used for screen shots in this guide.
- **ALL** Provider and Staff reports now include **Labels and Letters** functionality. The **Labels** option allows you to send mailings or emails to Staff and/or Providers who are coming due for report items, such as Background Checks, Immunizations, Trainings, etc... The **Letters** option allows you to create subject-specific letters for the recipients. You can insert fields into the letter template, such as <First Name>, <Last Name,> <Address> and etc..., and allow CYMS to populate them with the information for each Provider or Staff Member pulled on the report. One such field is <Report Detail>. When inserted in the body of a letter, it will list the detail of the report that was run. For example: If you run the Completed-Due report and have <Report Detail> in the body of your letter template, any training code pulled by the report for a specific Provider or Staff Member will be included in that Provider or Staff Member’s letter.
- **Statuses:** You can manipulate the list in the Provider/Staff browser by the selections you make in the **Include The Following Statuses** field. If you select **Active** only, the browser will contain *only* the names/IDs of Staff Members or Providers who are active. If you select **Active** and **Resigned (or Perm Inactive)** if on the Provider version of the report), then your browser will contain names/IDs of all Staff or Providers who are *either* Active and/or Resigned/Permanently Inactive.
- You can press the **F1** key from any screen in CYMS to obtain field level help.

## Provider Completed-Due Report

**Provider Path:** Go to Reports → CY5 → Provider Reports

**Staff Path:** Go to Reports → CY5 → Staff Reports

This report is used to:

- Identify Providers who are coming due or are overdue for any combination of the following items:
  - Credentials/Evaluations
  - Medical
  - Background Checks
  - Training
  - Home Visits
  - Inspections
  - Operational Requirements
  - Pet Immunizations
  - Certifications
- View any combination of the above items – whether completed or due.
- Determine which Providers are missing certain codes.
- Identify background checks that have been initiated but not completed.
- Can be exported to Excel
- **Note:** This report can print a complete training record, but it does not count, show or tally credit and clock hours. To get this information, use the traditional Training Record IDP report under Reports, CY5, Staff or Provider Reports.

The screenshot shows the 'Provider Completed-Due Report' application window. It features a main data table with columns for 'Provider Code', 'Last Name', and 'First Name'. To the right of the table is a control panel with various filters and options. The control panel includes fields for 'Beg Provider' and 'End Provider' with dropdown menus, a 'Date Range' section with 'From' and 'Thru' date pickers, and several checkboxes for 'Status' (Active, Perm Inactive, In Process, Temp Inactive) and 'Include' (Cred/Eval, Medical, Background, Training, Visit, Inspection, Op Req, Pet, Certification). There are also radio buttons for 'Report Opt' (Provider/Staff ID, Type/Code) and 'Name Opt' (Last, First, First Last). A 'Run Option' section contains radio buttons for different report execution criteria. At the bottom of the window are buttons for 'Print', 'Details >>', 'Last Settings', 'Default Settings', 'Templates', and 'Exit'.

### Key Fields

- **Date Range:** Depending on the **Run Option** you choose the date range may be ignored.
- **Statuses:** Which statuses do you wish to target?
- **Comment:** You can link a **Comment Code** that will print on the report.
  - The Comment Code can be created in Files→System→Other Maintenance→Comment Code Maintenance.

- Click **Add**, make the **Comment Type** “**CYS**” and give your **Comment Code** an ID and Description.
  - Then type in the text you wish to appear on the report. You can even make signature lines and date lines, etc.
- **Report Option:** Sort by Provider/Staff Id or by Type/Code. Essentially, do you want to see all the things due for Provider A and then all the things due for Provider B, or do you want to see all the people due for CPR vs Food Handling, etc?
  - **Include:** Select which items you wish to target: Credentials/Evaluations, Medical, Background Checks, Training, Home Visits, Inspections, Operational Requirements, Pet, Certifications.
- NOTE:** If running for the Pet option you will need to go to the **Details** screen, then **Advanced** and decide whether you wish to include Distemper and/or Immunizations.
- **Run Option:**

**All Records Due in the Date Range:** When this option is selected the Date Range is in play. If running for people who are **overdue**, it is a good idea to use a beginning date of 7/1/1985 thru the end of last month. If running proactively (for **future** items coming due) you would probably just run for a specific month or two.

Codes with **Completed Dates** will not print when running this option.

**All Records Due Prior to Today:** Date Range is **ignored**.

Codes with **Completed Dates** will not print when running this option.

**All Records Regardless of Due Date:** Date Range is **ignored**.

This option acts as way to print an entire history of all codes linked (due and complete).

Typically you would sort this by Provider/Staff Id.

**All Records Completed Within the Entered Date Range:** Date Range is in play.

Looks only at codes with Completed Dates.

**Include if Staff/Provider is Missing Any One of the Selected Codes:** Date Range is **ignored**.

This is a good way to find people who don't have certain codes linked.

To constitute a hit, the staff/provider must literally be missing the code(s).

**Include when Background Check Has Been Initiated But Not Completed:** Date Range is in play.

If the Initiated Date on the Background Check falls within the date range on the report and the record has a blank Completed Date, it will print and show the number of days it has been initiated.

**Run RecConnect:** Determine whether you want to run in Reconnect mode which allows you to email, text, etc. This is a very powerful tool that should be utilized.

- On the **Details** and **Advanced** screen, you can Skip or Include specific codes  
If the Include Column is blank, by default, the system will give you information on **all** codes.  
If the Include Column has 3 codes in it, you will get information on those 3 codes.
- You may also elect to print **Notes or Comments** that you have linked to the code.
- The **Wildcard Option** allows you to target similar codes due for multiple people.

**The following example is based on Army coding:**

If you want to find all Staff Members who have any **Abuse** code due, type the following in the **Wildcard** field: **\*-abuse**

This will search and find all Providers coming due for **0-Abuse, 2-Abuse, 3-Abuse**, etc.

You can also search for all codes of a specific type. To find search and find any **4** code, for example, type the following into the **Wildcard** field: **4\***

The screenshot shows the 'CYHS Completed-Due Report - Details' window. It is organized into two columns of filter sections. Each section includes a 'Skip' list, 'Add >>' and '<< Del' buttons, and an 'Include' list. Below each section is a checkbox for printing notes and a 'Wildcard' field. The sections are:

- Left Column:**
  - Cred/Eval:** Skip list includes C-CDA, C-MHA, C-MSA, E-CARAT, E-FDCRS. Includes 'Print Cred/Eval Records Notes?' checkbox and 'Wildcard' field.
  - Med Code:** Skip list includes MED-EVAL, SHOTS, TB-TEST. Includes 'Print Medical Records Notes?' checkbox and 'Wildcard' field.
  - Backgrnd:** Skip list includes ADCO, CID/DCII, CMDR, FAP, HOUSING, MP, REF-1. Includes 'Print Background Record Notes?' checkbox and 'Wildcard' field.
- Right Column:**
  - Training:** Skip list includes 3-MEDICA, 3-INSTA, 3-ENTRY, 4-ABUSE, 4-ENVIRO, 4-GUIDAN. Includes 'Print Training Due Notes?' checkbox and 'Wildcard' field.
  - Visit Code:** Skip list includes CARAT, CDA, FDCRS, INSP-ANN, INSP-DIE. Includes 'Print Visit Notes?' checkbox and 'Wildcard' field.
  - Insp Code:** Skip list includes FAP-IN, FAP-YR, FIRE-IN, FIRE-YR, HEA-IN, HEA-YR, HOMECK. Includes 'Print Inspection Notes?' checkbox and 'Wildcard' field.

At the bottom of the window are buttons: 'Print', 'Advanced', '<< Back', 'Templates', and 'Exit'.

Click **Advanced**

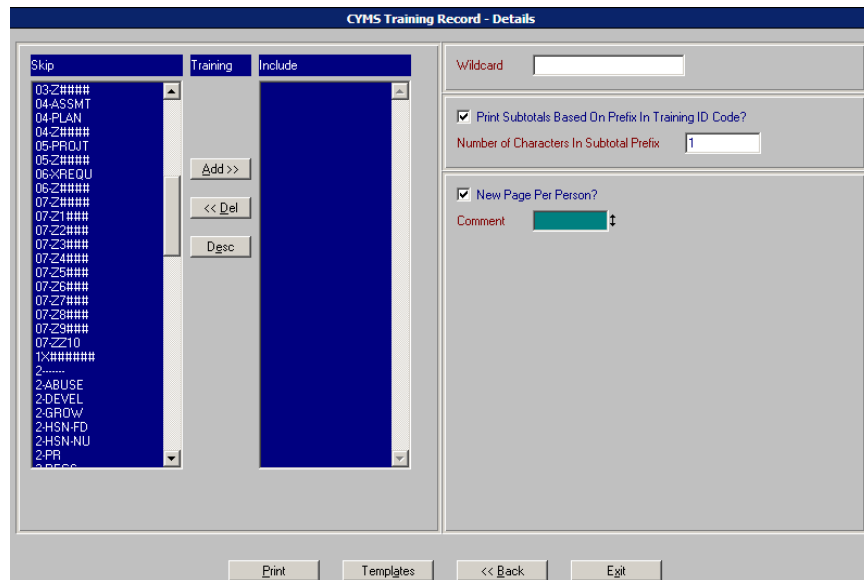


Wildcard field: \*-abuse

This will search and find all Providers coming due for 0-Abuse, 2-Abuse, 3-Abuse, etc.

You can also search for all codes of a specific type. To find search and find any 4 code, for example, type the following into the Wildcard field: 4\*

- When the **Print Sub-Totals Based On Prefix In Training ID Code** option is selected, the system will tally and group certain codes together. For Provider codes 1 or 2 would be appropriate here.
- You may separate each Staff/Provider's training requirements by selecting the **Print Each Person On A New Page** option.
- You can link a **Comment Code** to your Staff/Provider's training schedules on the **Details** screen.
  - The Comment Code can be created in Files→System→Other Maintenance→Comment Code Maintenance.
  - Click **Add**, make the **Comment Type "CYS"** and give your **Comment Code** an ID and Description.
  - Then type in the text you wish to print out on the Training Due Report. You can even make signature lines and date lines, etc.



## Provider Referral Report

**Provider Path:** Go to Reports → CYS → Provider Reports → Provider Referral Report

This report is used to:

- List the number of referrals given to a particular Provider or a range of Providers for a given date range.

You also can view referrals for individual Providers by going into the Provider module and clicking the View Referrals tab.

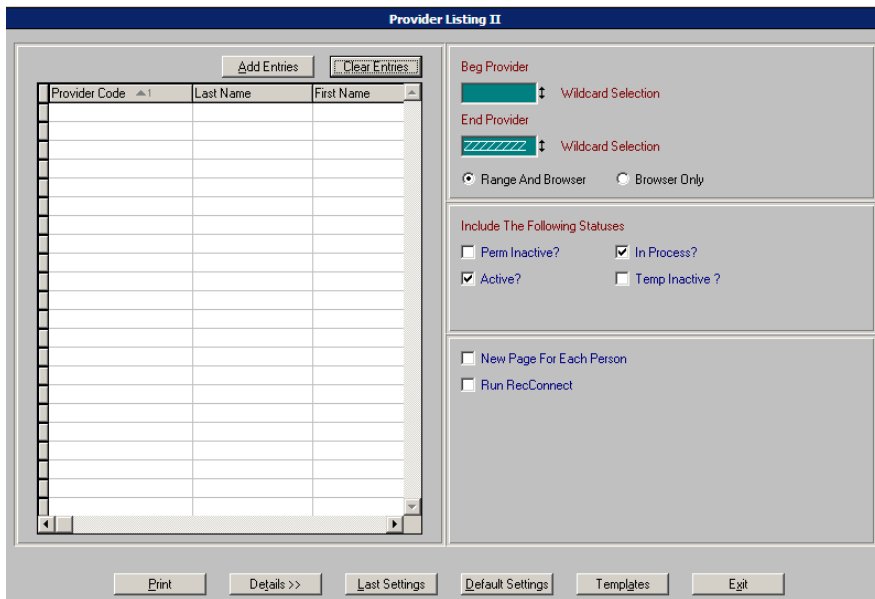
- *Hint:* If you select the **Print Referral Details Including Household Information** option, the report will display the date of the referral, the name of the child referred and the User ID of clerk who posted the referral. If this option is not selected, the report will display only the number of referrals given for each Provider in the range.

## Provider Listing II Report

**Provider Path:** Go to Reports → CYS → Provider Reports → Provider Listing II

**Staff Path:** Go to Reports → CYS → Staff Reports → Staff Listing II

- This report gives you complete flexibility when determining which information you want printed for your Staff and Providers and where you want it printed.  
Logic is based on the Roster Report Details screen.  
This report is also available in Excel.  
Allows for **EVERY** field on **ANY** tab in the Provider/Staff Module to be printed **except** the Provider's USDA Meal Times/Rates.



- On the **Details** screen use the items in the Selection List to “custom design” the report.
  - Add or remove print fields from the left selection list that you want to appear in the **first, second, and third column of your report**. Print fields that end in (L) can only be added to the **Long Row**.
  - The more items you add, the “busier” the report becomes.
  - Test different combinations to “design” easy-to-read reports that meet your specific purposes.

