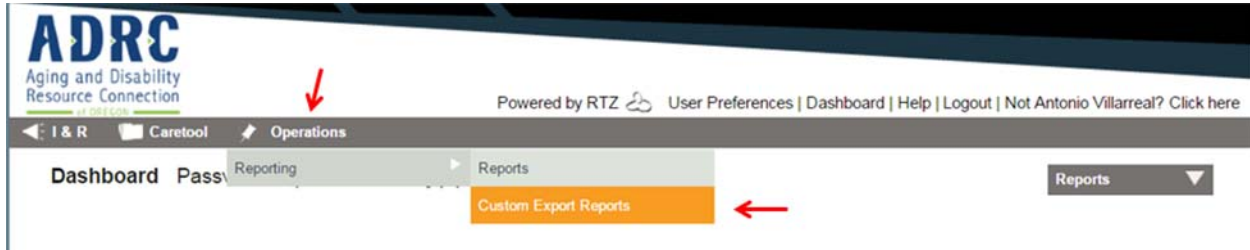
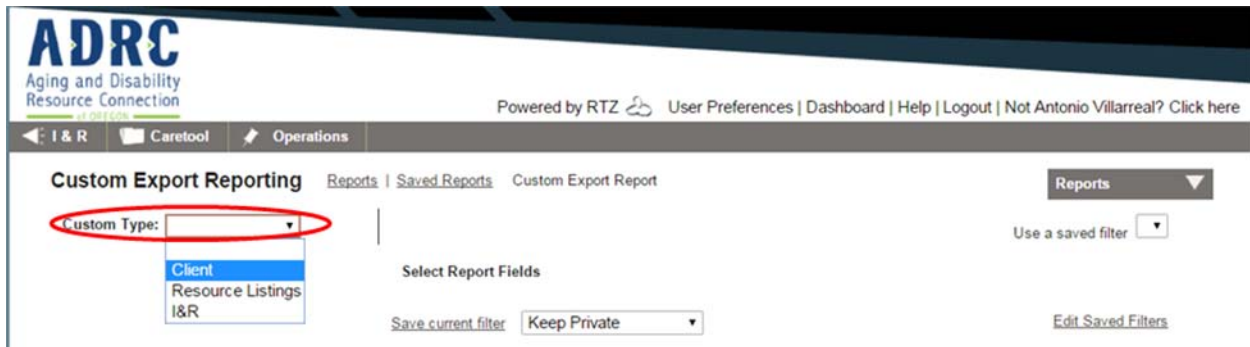


OPTIONS COUNSELING – Custom Report

1.- Go to Operations > Reporting > Custom Export Report



2.- Click on Custom Type drop down box, select “Client”



3.- Check the boxes for the fields needed from sections:

-**Identification:** GC ID, Last Name, First Name, DOB, Internal ID

-**Progress Notes:** Note Date, Encounter Date, Status, Agent, Element Unit Date, Element Enrollment, Element Units

Select Report Fields

▼ Identification

Select All

<input checked="" type="checkbox"/> GC ID <input type="button" value="edit"/>	<input checked="" type="checkbox"/> Last Name <input type="button" value="edit"/>	<input checked="" type="checkbox"/> First Name <input type="button" value="edit"/>
<input type="checkbox"/> Middle Name	<input checked="" type="checkbox"/> Date of Birth <input type="button" value="edit"/>	<input type="checkbox"/> Nickname
<input type="checkbox"/> SSN	<input checked="" type="checkbox"/> Internal ID <input type="button" value="edit"/>	<input type="checkbox"/> Age
<input type="checkbox"/> Address Line 2	<input type="checkbox"/> City	<input type="checkbox"/> Address Type
<input type="checkbox"/> County	<input type="checkbox"/> Zip	<input type="checkbox"/> Address
<input type="checkbox"/> Phone Number	<input type="checkbox"/> Email Type	<input type="checkbox"/> State
<input type="checkbox"/> Directions to Home	<input type="checkbox"/> Notes	<input type="checkbox"/> Phone Type
<input type="checkbox"/> Phone Valid Dates	<input type="checkbox"/> Email Valid Dates	<input type="checkbox"/> Email Address
<input type="checkbox"/> Case Manager	<input type="checkbox"/> Provider	<input type="checkbox"/> Address Valid Dates
		<input type="checkbox"/> Homeless
		<input type="checkbox"/> Client Status

▶ Demographics

▶ Contacts

▶ FCSP Relationship

▶ Assessments

▶ Service Utilization

▶ Service Enrollments

▼ Progress Notes

Select All

<input checked="" type="checkbox"/> Note Date <input type="button" value="edit"/>	<input checked="" type="checkbox"/> Encounter Date <input type="button" value="edit"/>	<input type="checkbox"/> Start time
<input type="checkbox"/> End time	<input type="checkbox"/> Progress Note	<input checked="" type="checkbox"/> Status <input type="button" value="edit"/>
<input type="checkbox"/> Agency	<input type="checkbox"/> Contact Type	<input checked="" type="checkbox"/> Agent <input type="button" value="edit"/>
<input type="checkbox"/> Element Referral	<input type="checkbox"/> Element Schedule Follow-Up	<input type="checkbox"/> Element Need
<input type="checkbox"/> Element Activity	<input checked="" type="checkbox"/> Element Unit Date <input type="button" value="edit"/>	<input type="checkbox"/> Element Mode/Location
<input type="checkbox"/> Element Method of Contact	<input checked="" type="checkbox"/> Element Units <input type="button" value="edit"/>	<input checked="" type="checkbox"/> Element Enrollment <input type="button" value="edit"/>
	<input type="checkbox"/> Element Significant Event	<input type="checkbox"/> Element Medicaid

4.- Select the Date Type (Progress Note), enter the Date Range, select your Agency Name, Service, Fund Identifier (Other), Service Detail (Options Counseling *and/or* Enhancing Equity), make sure the format selected is Excel (XLS) and click on “Run Report”

** for quality assurance select all options in Service Detail and review the data for other types of enrollments*

Client Filters:

Date Type:

From: To:

*Reflects any enrollments active during date range. If you want to see actual enrollment or disenrollment date, you need to select "Enrollment from" "Enrollment to" in the Service Enrollments section.

All Clients
 Specific Client

Provider:

Site:

Service:

Fund Identifier:

Service Detail:

Route:

Case manager:

Enrollment Status:

Received more than 0 units:

Unduplicated:

Note type:

[Save current filter](#)

[Edit Saved Filters](#)

Save Reports?

Generate report in the background

SCREEN XLS PDF CSV

If your reports are not downloaded instantly, you can check in “Dashboard”, they will be listed in the “To Dos & Reminders” area.

