



FSA PEER Support Services

Advanced Guidelines for Creating Reports in PEER

This Advanced Guideline is intended for those who have mastered simple reports and would like to build more complex reports from scratch. As always, you can use “Admin Picks” as another method to create reports. This document takes you through the creation of some more advanced and frequently used reports, such as, Line Chart, Bar Chart and a Cross tab report.

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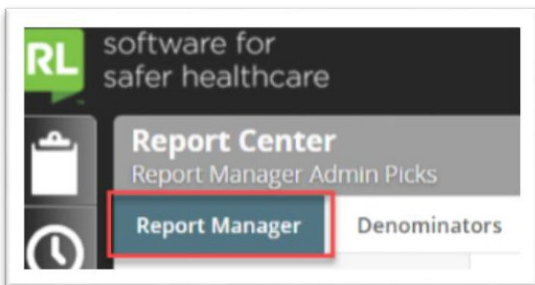
Accessing the Report Manager



The Report Center in PEER is accessed by clicking the Report icon on the left side of the screen.

Remember that only File Managers with Reports, Risk Managers and System Administrators can access this center. If you are unable to access the Report Center and you believe you should have access, contact the Risk Manager at your organization for assistance.

	Module	Report Name	Report ID	Description
<input type="checkbox"/>	Risk	Entrapment Risk Report	1001244	
<input type="checkbox"/>	Risk	Medication Errors - for Risk Mgr	1000919	
<input type="checkbox"/>	Risk	Risk Complaints and Grievances Campus Wide	1001811	
<input type="checkbox"/>	Risk	Risk Severity 3+ to CCSS Last Quarter	1001929	

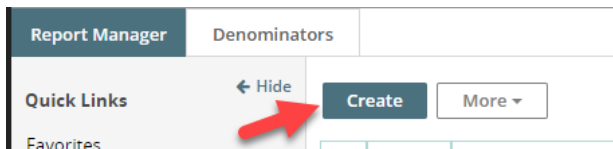


The Report Center contains two tabs at the top: Report Manager and Denominators. You will use the Report Manager tab.

When creating a report, think clearly about what data you are looking to show and how you want to display it. In our next example, we want to create a trend report that would show all falls for a specific Current Level of Care (ex. Skilled Nursing) by month for a given year (this can be any period). This would best be displayed in a line chart where the line will show the number of falls for a specific Level of Care for each month over a year. Remember that when creating a report in PEER, you will need to know field names so that the correct information will populate the report. If possible, print a copy of an event report for a fall so that you will be able to see the names of the various fields (the field is the question on the left side of the page, some of which have green asterisks next to them if they are mandatory). Once you are familiar with the names of the various fields, creating reports is easier. Common fields used in reports are General Event Type (i.e., falls, skin/tissue, med errors), Specific Event Type (i.e., fall from wheelchair, omitted medication, unknown skin tear/bruise), Current Level of Care (Skilled Nursing, Assisted Living, Independent Living), General Location (depends on how your organization's location list is set up, but might be the name of the unit, the floor of the building, the type of residents cared for), or the Event Location (again, look at your organization's location list in PEER).

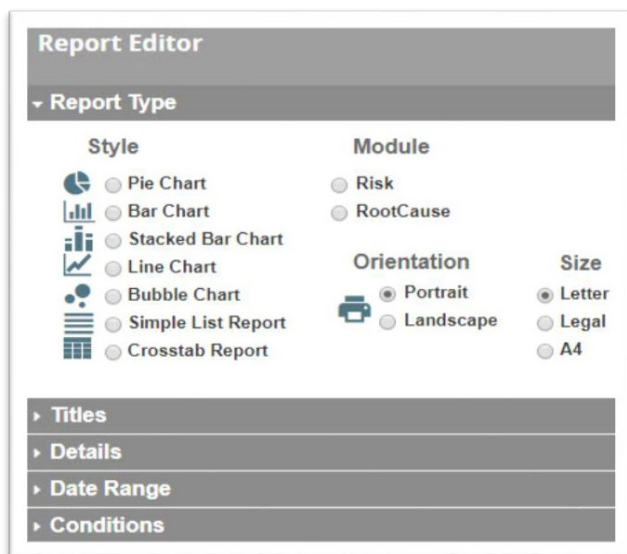
Creating a Line Chart Report

To create a report, click on the **Create** button from any area of the Report Center. This will open the Report Editor and allow you to create a report from the very beginning.



Example 1: Trend Line chart for a Specific Level of care

A line graph trend report with a single line that would show all falls for a specific Level of Care (Skilled Nursing) by month for a given year.



When you open the Report Editor, you will see the following screen.

The five (5) different sections will need to be completed to run your report. The first report example in this document is a Line Chart report titled *Falls by Current Level of Care*.

Remember – to open or collapse a section, click on the triangle next to the title. Some sections in the Report Editor will not open until the preceding sections are completed.

Report Editor

▼ **Report Type**

Style

- ☐ Pie Chart
- ☐ Bar Chart
- ☐ Stacked Bar Chart
- ☒ Line Chart
- ☐ Bubble Chart
- ☐ Simple List Report
- ☐ Crosstab Report

Module

- ☒ Risk
- ☐ RootCause

Orientation

- ☐ Portrait
- ☒ Landscape

Size

- ☒ Letter
- ☐ Legal
- ☐ A4

► **Titles**

Select your Style (Line Chart will be selected for the first example), select the Module (Risk), and select the Orientation (for Line Chart, we recommend Landscape).

As you select the Style, you will see the Chart Details section automatically open with the different data fields that are available for that Style of report.

Next you will need to open the **Titles** section by clicking on the arrow next to the heading. Once open, you can

type in the name of the report in the text boxes.

► **Titles**

Titles

Report Title:

Falls by Current Level of Care [Click to add variables](#)

Sub Title 1:

2019 [Click to add variables](#)

Sub Title 2:

{Filter} [Click to add variables](#)

Footer:

[Click to add variables](#)

This title can be adjusted at any time by going to the Titles section and changing the information in the text box.

The Subtitles are available for additional text such as date ranges, Level of Care, etc. You can also add variables (self-populating choices that are updated every time you run the report). We recommend adding the Date variable in the Footer text box so that the run date is shown each time you run the report.

After clicking the green button “Click to add variables” (see above screenshot), a pop-up box will show. Select the variable you wish to add and then click OK. It will show up in the text box with { } around the variable you selected.

The Filter variable is automatically added in Subtitle 2 in the report template. To remove this variable, simply highlight it in the text box and delete the term {Filter}. To add the Filter variable back in, follow the directions above.

Next is the **Chart Details** section. Remember that the section heading changes depending on the Style of report you select. For this report example, *Falls by Current Level of Care*, we want the report to count the number of falls for each specific Current Level of Care over a period.

A Line Chart report can count the number of files in certain categories. In the first field function, select Count. The data field that you want to count in PEER is FileNr (these numbers are unique, so it allows the software to count the number of individual files in the groups you select).

Select FileNr by clicking the triangle/arrow in the Data value field (see above) and typing the name of the field that you want in the text field at the bottom of the drop down. Highlight and click the field and it will populate the field. Once you start typing a word, the selections narrow until you get to the choice you want. If you are unsure of the terminology or exact field name, try typing a word that is in the name and see if your choice is there. If you are not sure of the term you need, you may need to reference an event form to find the term you wish to use. In some cases, you also need to pay attention to the section titles in green with a bar next to them. That references the section where the term exists in the forms themselves. Sometimes multiple sections have the same term, but this does not happen very often.

Now you select the Grouping. For this report example, *Falls by Current Level of Care*, we want the report to trend over a period.

Chart Details

Chart Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the graph: FileNr

Grouping

Group by: Event Date (mm-dd-yyyy) - Trend Year

☒ Sub group by: Current Level of Care

Display

☒ All ☐ Top 20

☒ Show the remainder

Axis

Label angle: 30

Horizontal Axis Text:

Vertical Axis Text:

Search dropdown for Sub group by: Current Level of Care

In the Group by: field, click the arrow and in the drop down box text field, start typing the grouping term you want to use, click the term and it will populate the field. In this report, we are grouping by *Event Date (mm-dd-yyy) – Trend Year Month Name*. Other ideas for grouping include Entered Date trend fields.

At this stage, we would only see a count of the files by the month in the time period. To further be able to identify the Current Level of Care in the

report, we will Subgroup by Current Level of Care. Click the check box beside Subgroup by: then the arrow beside it, search for and select the field Current Level of Care.

Chart Details

Chart Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the graph: FileNr

Grouping

Group by: Event Date (mm-dd-yyyy) - Trend Year

☒ Sub group by: Current Level of Care

Display

☒ All ☐ Top 20

☒ Show the remainder

Format: General

☐ Show the grand total

Point Labels

☒ Show point labels

Angle: 90

Overlapping Mode: None

Data

☐ Show data grid ☐ Show regression line

Axis

Label angle: 30

☐ Stagger labels

Horizontal Axis Text:

Current Level of Care - Skilled Nursing

Vertical Axis Text:

Number of Files

Add Horizontal and Vertical Axis Text so that it can display on the report. For this report, in the Horizontal Axis Text add *Current Level of Care – Skilled Nursing*. And for the Vertical add *Number of Files*.

The Display and Values data are usually not adjusted for this type of report.

Legend

Position

Click in the quadrant where you want the legend to appear.

Visibility

☒ Visible

Direction

Bottom to Top

Values

Format: General

The Legend is the last part of this section. You can adjust the position of the legend on the grid.

If the legend is visible, you can move it by clicking a box on the grid and the legend will move to that box.

If you do not wish the legend to be visible, simply uncheck the box.

Now open the **Date Range** section by clicking the triangle next to the title. This is where you set your date range for the report.

▼ Date Range

Please select the relevant time period:

☐ All dates

For:

☐ Today
☐ This week
☐ This month
☐ This calendar quarter
☐ This fiscal quarter
☐ This calendar year
☐ This fiscal year
☐ Custom

☐ Yesterday
☐ Last week
☐ Last month
☐ Last calendar quarter
☐ Last fiscal quarter
☒ Last calendar year
☐ Last fiscal year
☐ Last

From: to:

You must first pick a date that the report will reference – the Event Date (in the Incident section) in this case.

To select this, in the For: box click the arrow and in the text field at the bottom of the drop down box, start typing the term Event Date.

It is best to keep the date field used in this section, the same as the date field being used to group the report in the Chart Details section.

Now you select the Date Range you want the report to reference. You can select the Date Range by using one of the available terms such as Last calendar year.

The final section to complete is **Conditions**. This is where you select the conditions that you want in the report. For this Line Chart, we want to “condition” the File State, General Event Type and Current Level of Care so that we narrow down the results to only show what we need. Selecting and connecting conditions can be tricky and may take a couple of tries until you get the right conditions set.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed.

▼ Conditions

Edit in Full Screen Copy Paste Clear Expression

OR

File State equals New

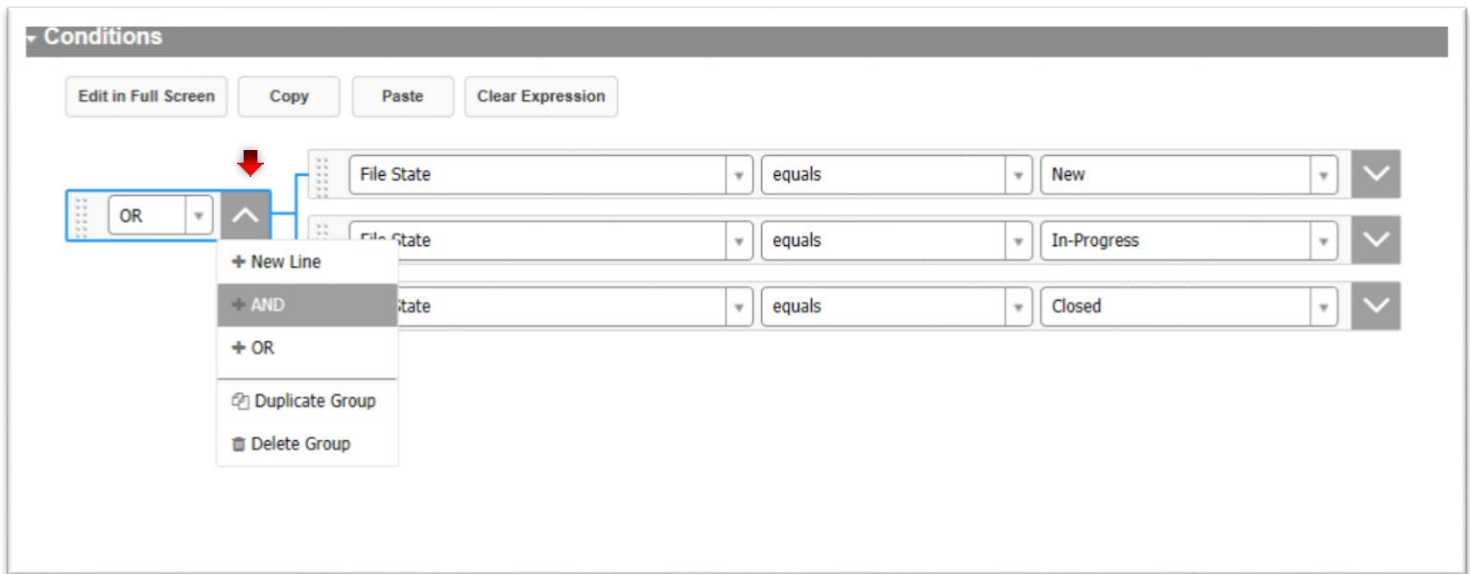
File State equals In-Progress

File State equals Closed

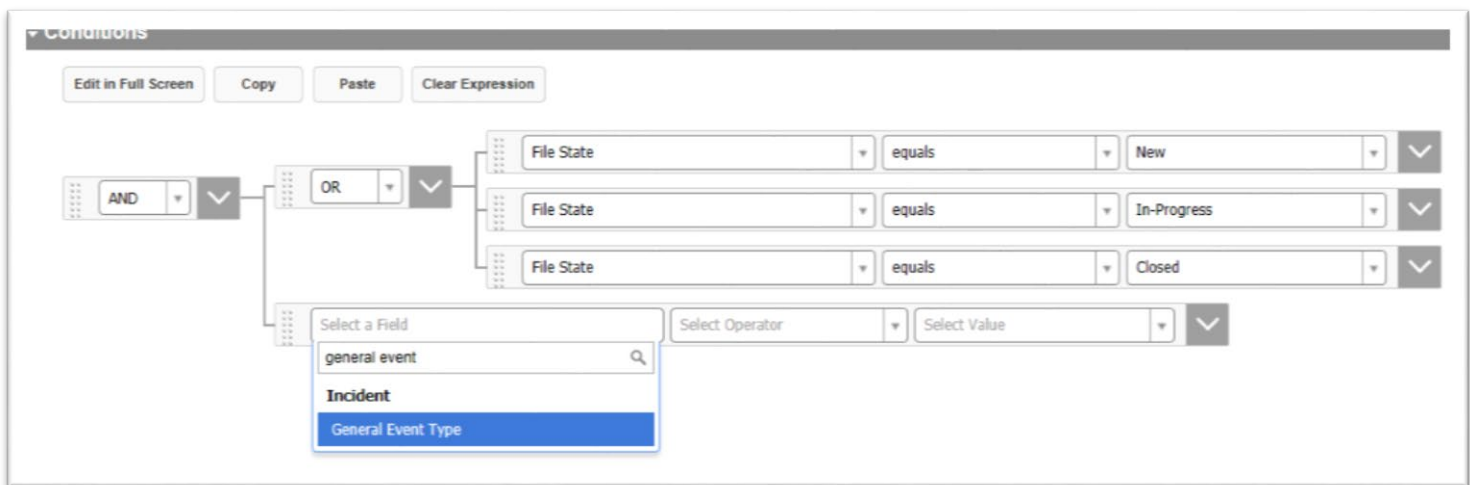
Now we want to condition the report to show that we are only going to be searching for files that are falls. If you do not condition it to state only falls, it will pull data for ALL types of events (falls, skins, med error, etc.).

This is done using the term General Event Type. To add another condition, you must connect the new condition to the existing entire group of File State conditions.

To add a condition, click on the upwards carot next to the OR connector and select AND.



In the 'Select a Field' box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.



Select 'Equals' in the Operator box. The Value you select should be FALL.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL. Remember this trick: OR gives you more (this OR that OR the other thing); AND will band things together (show Falls AND the current level of care of Skilled Nursing, to show only falls for SNF since both conditions need to be met). Another example to help you understand: you cannot have a File State that is New AND In Progress AND Closed all at the same time, so this helps you to recognize why they are connected by the OR.

Now we need to add the last condition. The final condition will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care. Again, if we did not do this, then it would show all falls for all Levels of Care that we have scope to see. Remember that scope controls everything, so that if you ONLY have scope to see a certain Level of Care, such as Skilled Nursing, then you would not need to add this condition. But if your scope covers more than one Level of Care, then you would need to add in this condition.

To add this condition, select the upward carrot next to "FALL" and select '+ New Line'. This will add a new line at the same condition set as the General Event Type.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

+ New Line
+ AND
+ OR
Duplicate Line
Delete Line

Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND are the General Event Type of FALL AND that happened to residents with the Current Level of Care is Skilled Nursing/Healthcare.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

Current Level of Care equals Skilled Nursing/Healthcare

Now the report is ready to run. To run the report, click the green Run Report button at the bottom right of the screen.

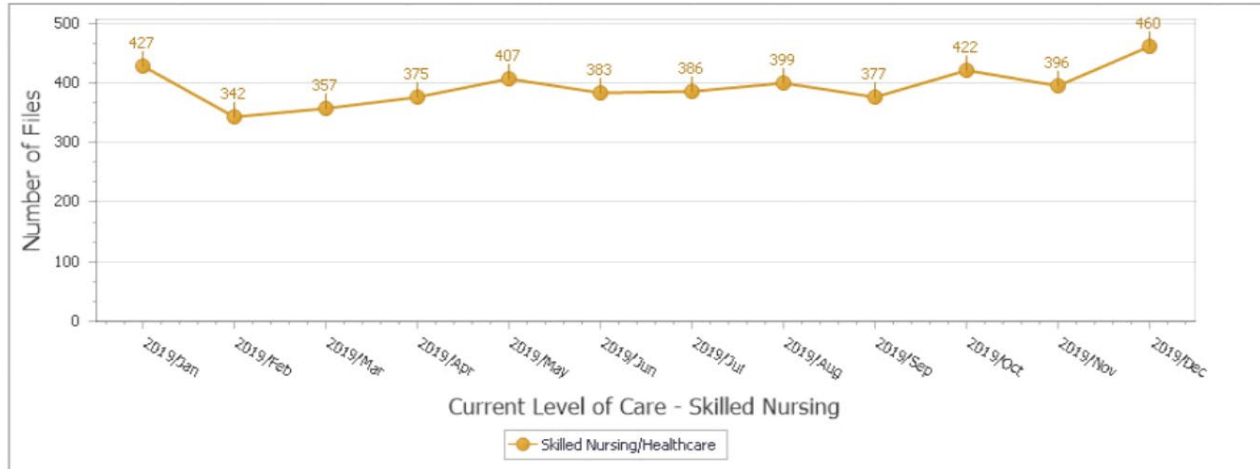
Cancel Run report

Here is a picture of the report with the legend visible:

Falls by Current Level of Care

2019

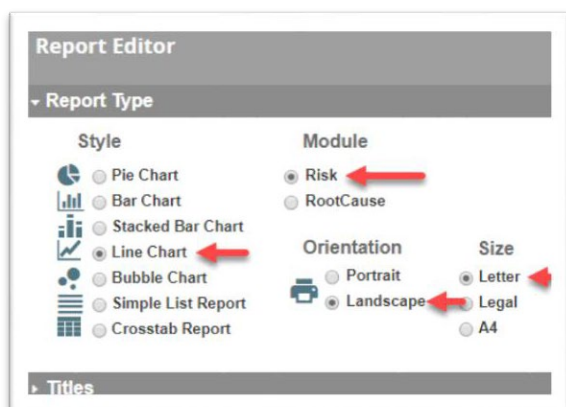
((Event Date (mm-dd-yyyy) is within Calendar 2019) and (((File State is equal to "New") or (File State is equal to "In-Progress") or (File State is equal to "Closed")) and (General Event Type is equal to "FALL") and (Current Level of Care is equal to "Skilled Nursing/Healthcare")) and (((Scope is equal to "All"))))



Example 2: Trend Line chart for two Levels of care

Another example is creating a Line Chart with more than 1 line in the chart.

Create a Report to show a line graph that would track falls by year (say over a 5 year period) with more than 1 line: one line for Skilled Nursing Level of Care and one for Assisted Living Level of Care.



Report Editor

Report Type

Style

- ☐ Pie Chart
- ☐ Bar Chart
- ☐ Stacked Bar Chart
- ☒ Line Chart
- ☐ Bubble Chart
- ☐ Simple List Report
- ☐ Crosstab Report

Module

- ☒ Risk
- ☐ RootCause

Orientation

- ☐ Portrait
- ☒ Landscape

Size

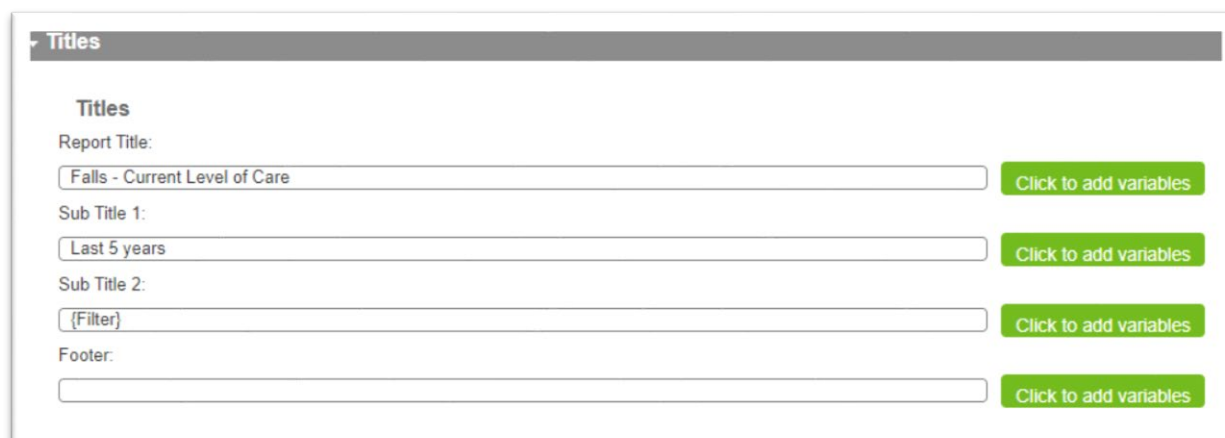
- ☒ Letter
- ☐ Legal
- ☐ A4

Titles

Just like the first example, select the Style as **Line Chart Report**, and the module as **Risk**.

Select the Orientation as **Landscape** and Size as **Letter**.

Next you will need to open the **Titles** section by clicking on the arrow next to the heading. Once open, you can type in the name of the report in the text boxes.



Titles

Titles

Report Title:

Falls - Current Level of Care [Click to add variables](#)

Sub Title 1:

Last 5 years [Click to add variables](#)

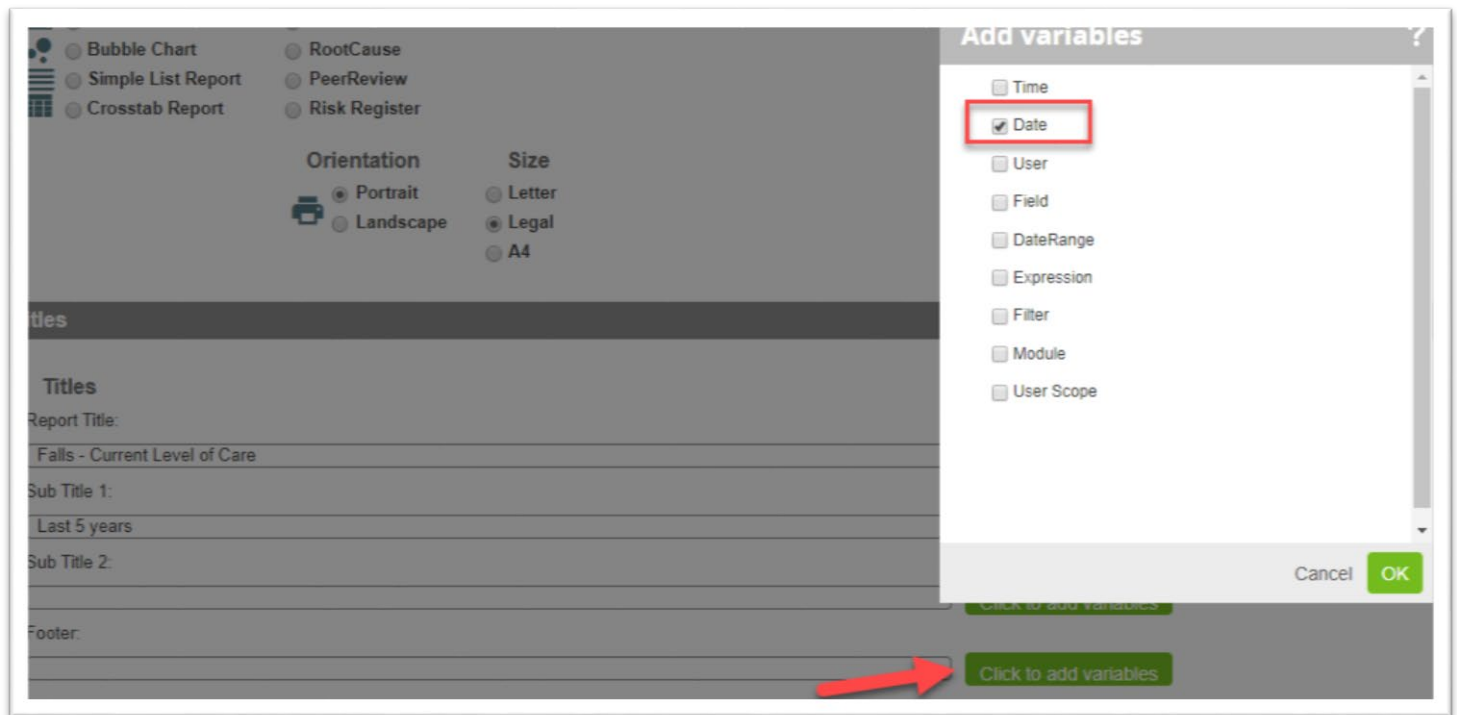
Sub Title 2:

{Filter} [Click to add variables](#)

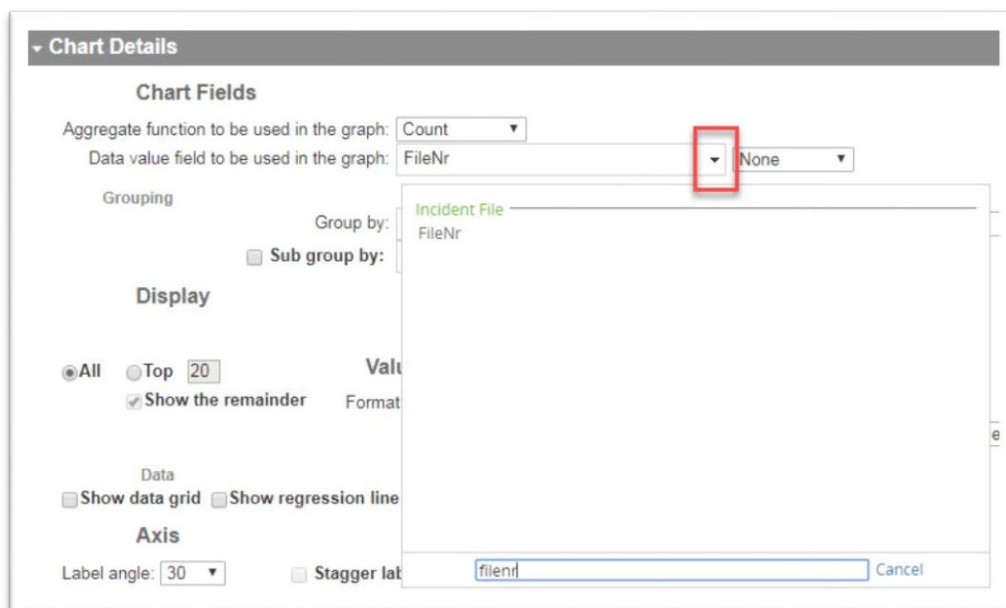
Footer:

[Click to add variables](#)

The Subtitles are available for additional text such as date ranges, Level of Care, etc. You can also add variables (self-populating choices that are updated every time you run the report). We recommend adding the Date variable in the Footer text box so that the run date is shown each time you run the report.



A Line Chart report can count the number of files in certain categories. In the first field function, select Count. The data field that you want to count in PEER is FileNR (these numbers are unique, so it allows the software to count the number of individual files in the groups you select).



Select FileNR by clicking the triangle/arrow in the Data value field (see above) and typing the name of the field that you want in the text field at the bottom of the drop down. Highlight and click the field and it will populate the field.

Now select the Grouping. For this report example, we want the report to trend over a period of time.

Chart Details

Chart Fields

Aggregate function to be used in the graph:

Data value field to be used in the graph:

Grouping

Group by:

☒ Sub group by:

Display

☒ All ☐ Top

☒ Show the remainder

Values

Format:

☐ Show the grand total

Grand Total

Point Labels

☒ Show point labels

Angle:

Overlapping Mode:

In the Group by: field, click the arrow and in the drop down box text field, start typing the grouping term you want to use. Click the term and it will populate in the field. In this report, we are grouping by *Event Date (mm-dd-yyyy) – Trend Year*. Other ideas for grouping include Entered Date trend fields.

At this stage, we would only see a count of the files by the year in the time period. To further be able to identify the Current Level of Care in the report, we will Sub group by Current Level of Care. Click the check box beside Sub group by: then the arrow beside it, search for and select the field Current Level of Care.

Chart Details

Chart Fields

Aggregate function to be used in the graph:

Data value field to be used in the graph:

Grouping

Group by:

☒ Sub group by:

Display

☒ All ☐ Top

☒ Show the remainder

Values

Format:

☐ Show the grand total

Grand Total

Point Labels

☒ Show point labels

Angle:

Overlapping Mode:

Data

☐ Show data grid ☐ Show regression line

Axis

Label angle: ☐ Stagger labels

Horizontal Axis Text:

Vertical Axis Text:

Add Horizontal and Vertical Axis Text so that it can display on the report. For this report, in the Horizontal Axis Text add *Current Level of Care – Skilled Nursing*. And for the Vertical add *Number of Files*.

The Display and Values data are usually not adjusted for this type of report.

The Legend is the last part of this section. You can adjust the position of the legend on the grid.

If the legend is visible, you can move it by clicking a box on the grid and the legend will move to that box.

If you do not wish the legend to be visible, simply uncheck the box.

Now open the **Date Range** section by clicking the triangle next to the title. This is where you set your date range for the report.

Select the Date Range you want the report to reference. You can select the Date Range by using one of the available terms such as Last 5 Calendar Years.

The final section to complete is **Conditions**. This is where you select the conditions that you want in the report. For this Line Chart, we want to “condition” the File State, General Event Type and Current Level of Care so that we narrow down the results to only show what we need. Selecting and connecting conditions can be tricky and may take a couple of tries until you get the right conditions set.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed.

The 'Conditions' panel shows a logical expression builder. At the top are buttons: 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression'. Below is a connector set to 'OR'. Three conditions are listed, each with a 'File State' field, an 'equals' operator, and a value field. The values are 'New', 'In-Progress', and 'Closed' respectively. Each condition has a small 'v' icon at the end of its row.

Now we want to condition the report to show that we are only going to be searching for files that are Falls. This is done through the term General Event Type. To add another condition, you must connect the new condition to the existing entire group of File State conditions.

To add a condition, click on the upwards carot next to the OR connector and select AND.

This screenshot shows the same 'Conditions' panel, but with a context menu open over the 'OR' connector. The menu includes options: '+ New Line', '+ AND' (which is highlighted), '+ OR', 'Duplicate Group', and 'Delete Group'. A red arrow points to the 'Copy' button at the top of the panel. The conditions below remain the same: 'File State' equals 'New', 'In-Progress', and 'Closed'.

In the 'Select a Field' box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

Select a Field

general event

Incident

General Event Type

Select Operator

Select Value

Select 'Equals' in the Operator box. The Value you select should be FALL.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

Now we need to add one more condition. This will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care.

To add this condition, select the upward carrot next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.

The screenshot shows the 'Conditions' panel with the following structure:

- Root connector: **AND**
 - Connector: **OR**
 - Field: File State, Operator: equals, Value: New
 - Field: File State, Operator: equals, Value: In-Progress
 - Field: File State, Operator: equals, Value: Closed
 - Field: General Event Type, Operator: equals, Value: FALL

A red arrow points to the 'FALL' value, and a context menu is open with the following options:

- + New Line
- + AND
- + OR
- Duplicate Line
- Delete Line

Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL AND that happened to residents with the Current Level of Care of Skilled Nursing/Healthcare.

The screenshot shows the 'Conditions' panel with the updated structure:

- Root connector: **AND**
 - Connector: **OR**
 - Field: File State, Operator: equals, Value: New
 - Field: File State, Operator: equals, Value: In-Progress
 - Field: File State, Operator: equals, Value: Closed
 - Field: General Event Type, Operator: equals, Value: FALL
 - Field: Current Level of Care, Operator: equals, Value: Skilled Nursing/Healthcare

Finally, add another Current Level of Care (ex. Skilled Nursing/Healthcare) to the conditions using the OR connector so that we are able to see results for more than one specified Level of Care (remember OR gives you more!). To do so, click on the upward carrot next to "Skilled Nursing" and select '+OR'. Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Assisted Living/Personal Care.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

OR

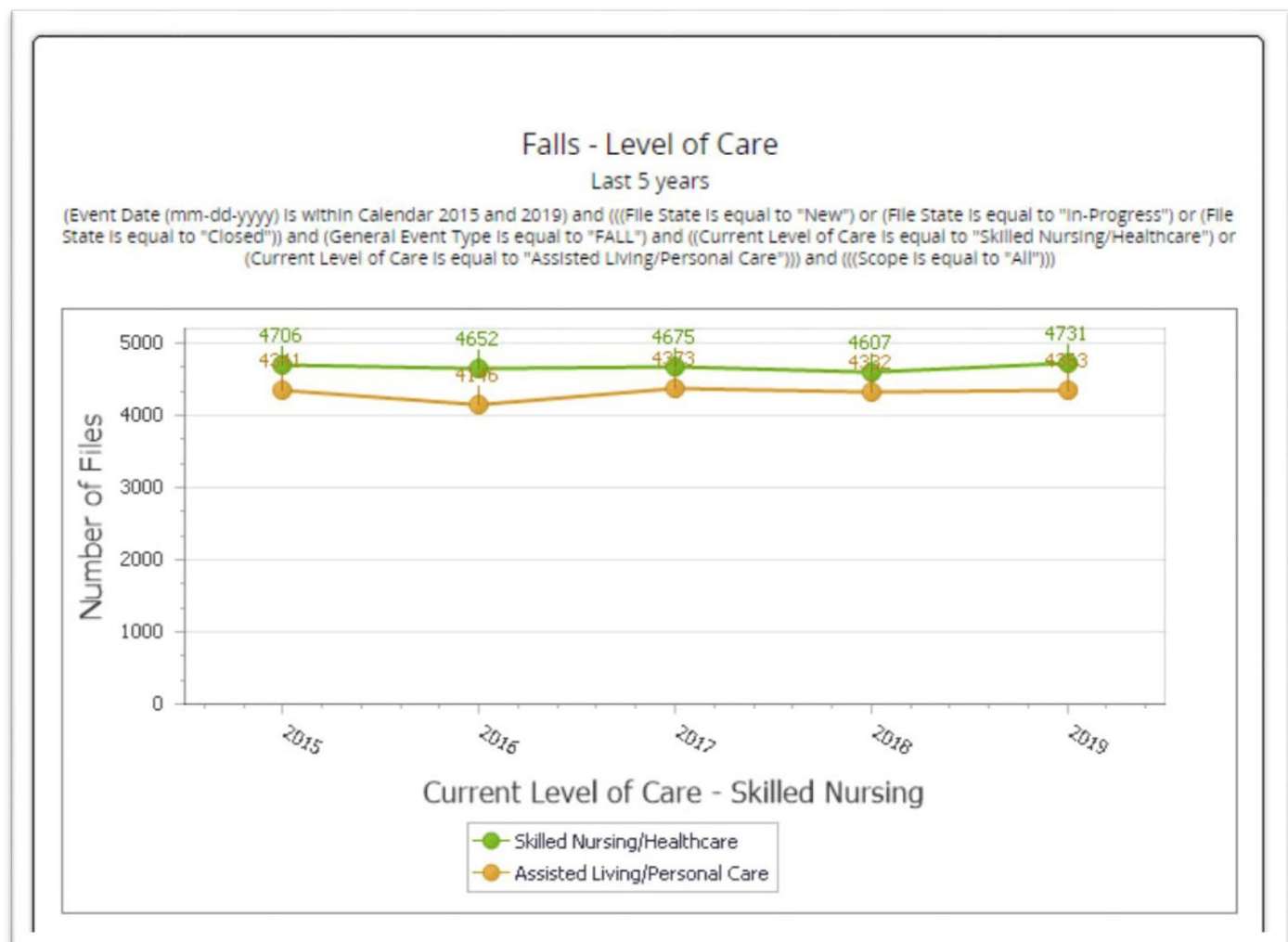
Current Level of Care equals Skilled Nursing/Healthcare

Current Level of Care equals Assisted Living/Personal Care

Cancel Run report

Now the report is ready to run. To run the report, click the green Run Report button at the bottom right.

Here is what the Report looks like:



Creating a Bar Graph Report

Bar Graph Report - 2 Hour Time Block

Our next example is a time block report that would show falls for a specific Level of Care (Skilled Nursing) for a General Event Type in 2 hour time blocks for a period of time (say a quarter).

Click on the **Create** button from the Report Center. Select the Report Style as Bar Chart and Orientation as Landscape. Pick the Size as Letter if you plan to print this out or else you can select Legal if you want more real estate. Select “Risk” from the module section.

The screenshot shows the 'Report Editor' window with the 'Report Type' section expanded. Under 'Style', the 'Bar Chart' option is selected. Under 'Module', the 'Risk' option is selected. Under 'Orientation', the 'Landscape' option is selected. Under 'Size', the 'Letter' option is selected. Red arrows point to the 'Bar Chart', 'Risk', 'Landscape', and 'Letter' options.

Provide a Report **Title**. You can add the DateRange as a Sub-title 1.

The screenshot shows the 'Titles' section of the Report Editor. It contains four input fields for titles, each with a 'Click to add variables' button to its right. The 'Report Title' field contains the text 'Falls by 2-hr Time Block - Skilled Nursing'. The 'Sub Title 1' field contains the text '{DateRange}'. The 'Sub Title 2' and 'Footer' fields are empty.

Go to the **Chart Details** area:

In the first field function, select Count. The data field that you want to count in PEER is FileNR.

In the Group By: field select **Calc Event Time – Aggregate**.

Chart Details

Chart Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the graph: FileNr

Grouping

Group by: Calc Event Time - Aggregate

Sub group by:

Display

All Top 20

Show the remainder

Data

Show data grid Show regression line

Axis

Label angle: 30

Horizontal Axis Text: Time Blocks

Vertical Axis Text:

Incident

Calc Event Day of Week

Calc Event Time - Aggregate

calc event

Cancel

Check the **Apply aggregation** box to be able to configure the aggregation blocks and click on Modify.

Grouping

Group by: Calc Event Time - Aggregate

Sub group by:

Apply aggregation: ☒ Points: Not configured

Modify

Start with 0 and keep increasing the number by 200 to configure 2 hour time blocks. This could be increments of 400 for 4 hour time blocks. The number signify time in the military time format.

Aggregation

Aggregation ranges:

New: 0 Add

Aggregation not defined.

Aggregation

Aggregation ranges:

New: 200 Add

Min

Aggregation

Aggregation ranges:

New: 400 Add

Min to 0 Delete

1 to 200 Delete

201 to Max Delete

Aggregation

Aggregation ranges:

New: Add

Min to 0	Delete
1 to 200	Delete
201 to 400	Delete
401 to 600	Delete
601 to 800	Delete
801 to 1000	Delete
1001 to 1200	Delete
1201 to 1400	Delete
1401 to 1600	Delete
1601 to 1800	Delete
1801 to 2000	Delete
2001 to 2200	Delete
2201 to Max	Delete

Close OK

Add in increments of 200 till 2200 as the max is 2400.
Click OK.

Horizontal Axis Text: Time Blocks

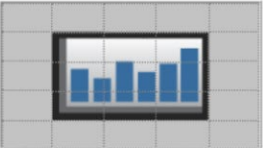
Vertical Axis Text:

☐ Enable y-axis scale breaks

Legend

Position

Click in the quadrant where you want the legend to appear.



Visibility

☐ Visible

Direction

Top to Bottom ▼

Values

Format: General ▼

Add the Horizontal Axis Text:
Time Blocks.

This type of Report does not need a Legend, so keep the visibility unchecked.

Next step is to add a **Date Range**:

Date Range

Please select the relevant time period:

☐ All dates

For: Event Date (mm-dd-yyyy) ▼ ←

<input type="radio"/> Today	<input type="radio"/> Yesterday
<input type="radio"/> This week	<input type="radio"/> Last week
<input type="radio"/> This month	<input type="radio"/> Last month
<input type="radio"/> This calendar quarter	<input checked="" type="radio"/> Last calendar quarter
<input type="radio"/> This fiscal quarter	<input type="radio"/> Last fiscal quarter
<input type="radio"/> This calendar year	<input type="radio"/> Last calendar year
<input type="radio"/> This fiscal year	<input type="radio"/> Last fiscal year
<input type="radio"/> Custom	<input type="radio"/> Last →

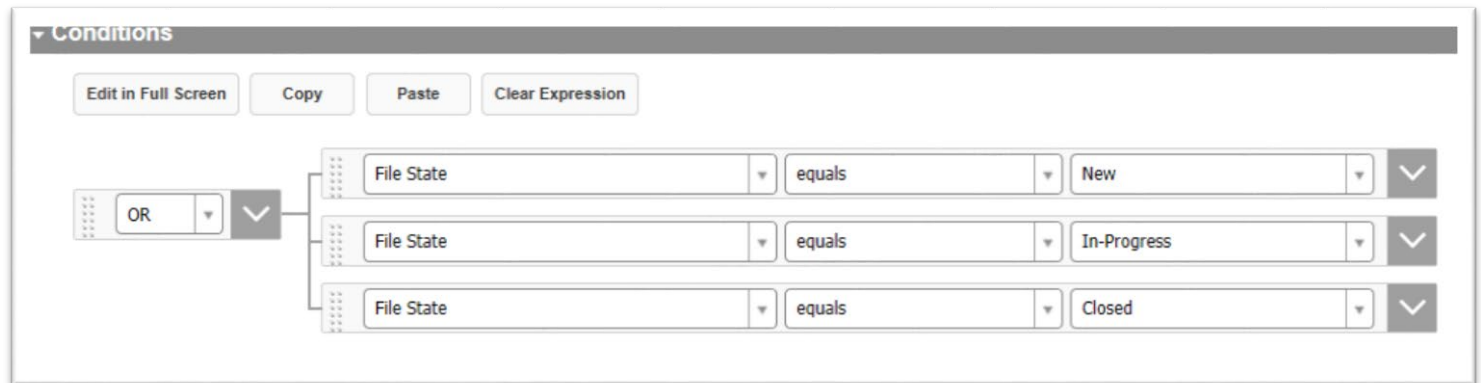
From: to:

Select Event Date (mm-dd-yyyy) from the drop-down and select Last calendar quarter.

Next step is to add the **Conditions**. For this Line Chart, we want to “condition” the File State, General Event Type and Current Level of Care so that we narrow down the results to only show what we need.

We need to include only Fall events so the expression should read General Event Type = FALL
And we only include Current Level of Care of Skilled Nursing/HealthCare so the expression should read Current Level of Care = Skilled Nursing/Healthcare. Connect the 2 expressions with AND connector.

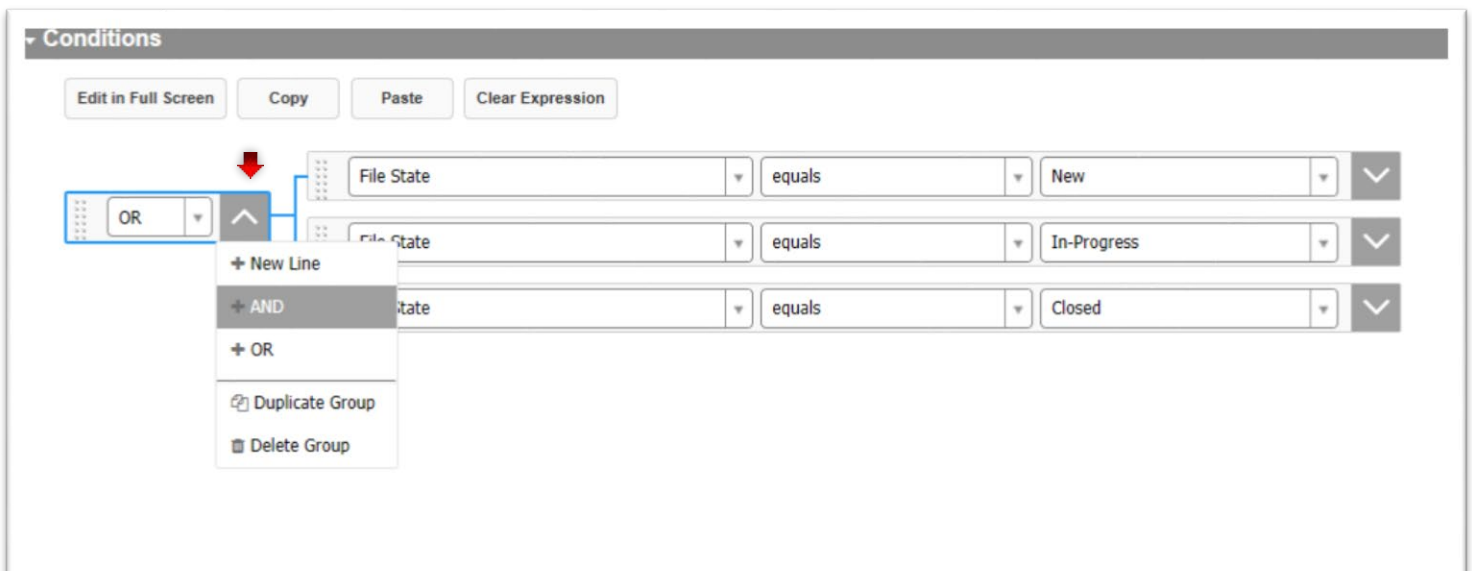
The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed.



The screenshot shows the 'Conditions' section of a software interface. At the top, there are buttons for 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression'. Below these, there is a connector box labeled 'OR' with a downward arrow. To the right of the connector, there are three rows of conditions, each with a 'File State' field, an 'equals' operator, and a value field. The values are 'New', 'In-Progress', and 'Closed' respectively. Each row has a small downward arrow at the end.

Now we want to condition the report to show that we are only going to be searching for files that are Falls. This is done through the term General Event Type. To add another condition, you must connect the new condition to the existing entire group of File State conditions.

To add a condition, click on the upwards carrot next to the OR connector and select AND.



The screenshot shows the 'Conditions' section with the same three conditions as before. A red arrow points to the 'OR' connector box. A blue box highlights the connector box, and a context menu is open next to it. The menu options are: '+ New Line', '+ AND' (which is highlighted), '+ OR', 'Duplicate Group', and 'Delete Group'. A blue line connects the 'AND' option to the connector box.

In the ‘Select a Field’ box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

Select a Field

general event

Incident

General Event Type

Select Operator

Select Value

Select 'Equals' in the Operator box. The Value you select should be FALL.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

Now we need to add the last condition. The final condition will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care.

To add this condition, select the upward carrot next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

- + New Line
- + AND
- + OR
- Duplicate Line
- Delete Line

Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL AND that happened to residents with the Current Level of Care of Skilled Nursing/Healthcare.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

Current Level of Care equals Skilled Nursing/Healthcare

Now the report is ready to run. To run the report, click the green Run Report button at the bottom right.

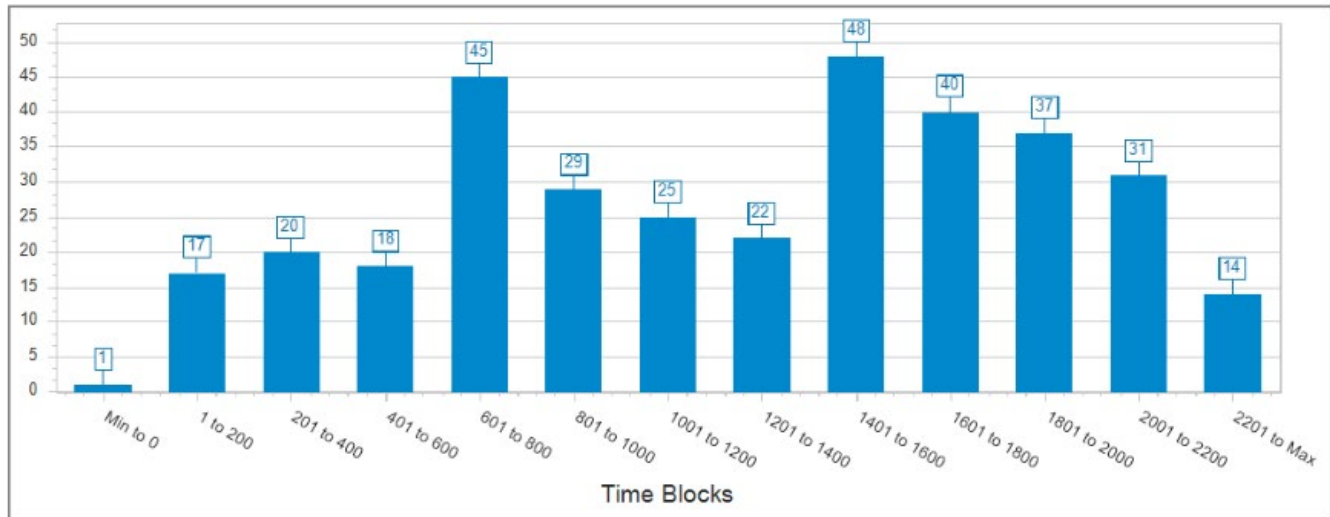
Cancel Run report

Here is what the Report will look like:

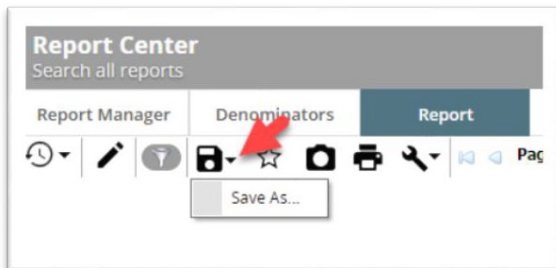
Falls by 2-hr Time Block - Skilled Nursing

Event Date (mm-dd-yyyy) is within Calendar 2024 Q1

(Event Date (mm-dd-yyyy) is within Calendar 2024 Q1) and (((File State is equal to "New") or (File State is equal to "In-Progress") or (File State is equal to "Closed"))) and (General Event Type is equal to "FALL") and (Current Level of Care is equal to "Skilled Nursing/Healthcare")) and (((Scope is equal to "All")))



Use the Floppy Disk icon to Save the Report in a Public or Private folder.

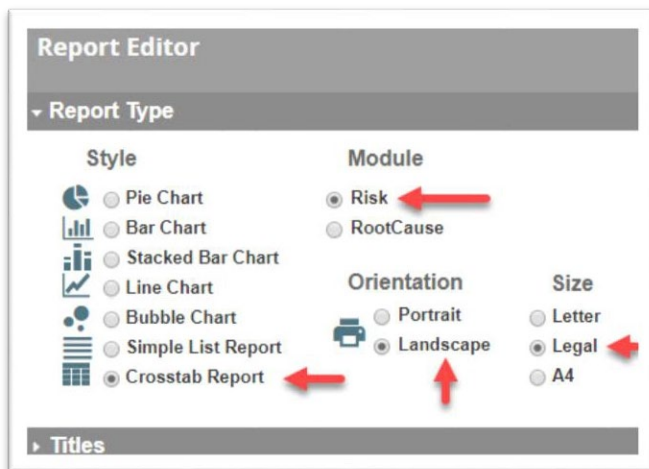


Creating a Cross tab Report

Crosstab Report for Falls by Resident Name

This Report is a Cross tab report that will show Fall events for a specific Level of Care (Skilled Nursing) trending across the year by Specific Event Type grouped by Resident Name.

From the Report Center access the Report Manager tab and click on Create to create a Report Editor report.



Report Editor

Report Type

Style

- ☐ Pie Chart
- ☐ Bar Chart
- ☐ Stacked Bar Chart
- ☐ Line Chart
- ☐ Bubble Chart
- ☐ Simple List Report
- ☒ Crosstab Report

Module

- ☒ Risk
- ☐ RootCause

Orientation

- ☐ Portrait
- ☒ Landscape

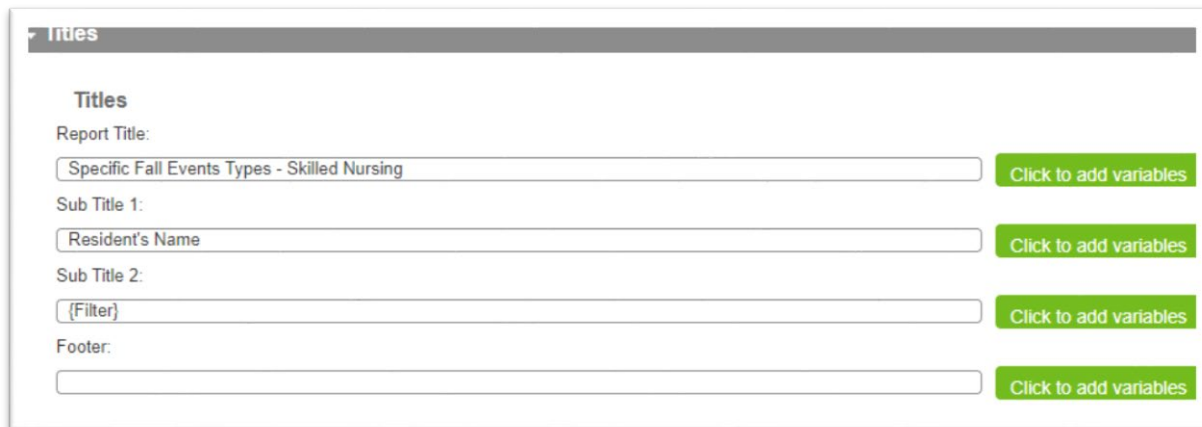
Size

- ☐ Letter
- ☒ Legal
- ☐ A4

Titles

In the Report Editor → Report Type Style select Crosstab report and select the Orientation as Landscape. For this example, we can set the Size to Legal.

Under **Titles** section add a Report Title and Sub Title:



Titles

Report Title:

Specific Fall Events Types - Skilled Nursing [Click to add variables](#)

Sub Title 1:

Resident's Name [Click to add variables](#)

Sub Title 2:

{Filter} [Click to add variables](#)

Footer:

[Click to add variables](#)

The next step is to add details to the **CrossTab Details** section.

▼ Cross Tab Details

CrossTab Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the CrossTab: FileNr

Row Grouping

Group by:

☐ Sub group by:

Group width:

Column Grouping

Group by:

Width:

► Date Range

► Conditions

filenr Cancel

In the first field function, select Count. The data field that you want to count in PEER is FileNR.

Under the Row Grouping heading, for Group by:, click on the down arrow to find and select the term Specific Event Type. Check on the box beside Sub group by: and click on the down arrow to search for the field that represents the Resident's Name. There are many name fields available to select from – this one is found under the green Person Affected heading and is the first field with the label 'Name'.

▼ Cross Tab Details

CrossTab Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the CrossTab: FileNr

Row Grouping

Group by: Specific Event Type

☒ Sub group by: Name

Group width:

Column Grouping

Group by:

Width:

► Date Range

Please select the relevant time period:

☐ All dates

For: Event Date (mm-dd-yyyy)

☐ Today

☐ This week

☐ This month

name Cancel

Under the Column Grouping heading, for the Group By:, find and select the Event Date (mm-dd-yyyy) – Trend Month Name field.

▼ CrossTab Details

CrossTab Fields

Aggregate function to be used in the graph:

Data value field to be used in the CrossTab:

Row Grouping

Group by:

☒ Sub group by:

Group width: pixels Sub group width: pixels

Column Grouping

Group by:

Width:

▼ Date Range

Please select the relevant time period:

☒ All dates

For:

☐ Today

☐ This week

☐ This month

☐ This calendar quarter

☐ This fiscal quarter

☐ This calendar year

☐ This fiscal year

Row and Column Group widths can be adjusted as per the length of the captions if any of the values are being cut off in the report. 100 pixels is the default. We have increased it to 150 for the Row Group and Sub-Group and 60 for the Column Group.

▼ CrossTab Details

CrossTab Fields

Aggregate function to be used in the graph:

Data value field to be used in the CrossTab:

Row Grouping

Group by:

☒ Sub group by:

Group width: pixels Sub group width: pixels

Column Grouping

Group by:

Width: pixels

▼ Date Range

Please select the relevant time period:

☒ All dates

For:

☐ Today

☐ This week

☐ This month

☐ This calendar quarter

☐ This fiscal quarter

☐ This calendar year

☐ This fiscal year

Now open the **Date Range** section by clicking the triangle next to the title. This is where you set your date range for the report.

The screenshot shows the 'Date Range' section of a report configuration tool. It features a title bar with a downward arrow and the text 'Date Range'. Below the title bar, there is a prompt 'Please select the relevant time period:'. A 'For:' dropdown menu is set to 'Event Date (mm-dd-yyyy)' followed by an 'in:' label. A grid of radio button options is presented in two columns. The first column includes 'Today', 'This week', 'This month', 'This calendar quarter', 'This fiscal quarter', 'This calendar year', 'This calendar year to date', 'This fiscal year', 'This fiscal year to date', and 'Custom'. The second column includes 'Yesterday', 'Last week', 'Last month', 'Last calendar quarter', 'Last fiscal quarter', 'Last calendar year' (which is selected with a blue dot), 'Last fiscal year', and a 'Last' dropdown menu followed by two empty input fields. At the bottom, there are 'From:' and 'to:' labels with corresponding dropdown menus.

Now you select the Date Range you want the report to reference. You can select the Date Range by using one of the available terms such as Last calendar year.

The next step is to add the **Conditions**.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed. We want to add in the conditions to say we only want to see Falls for Skilled Nursing.

To add the first condition, click on the upwards carrot next to the OR connector and select AND.

The screenshot displays the 'Conditions' section of the report configuration tool. At the top, there is a title bar with a downward arrow and the text 'Conditions'. Below the title bar, there are four buttons: 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression'. The main area contains three rows of conditions, each with a dropdown menu for the criteria, a dropdown for the operator (all set to 'equals'), and a dropdown for the value. The values are 'New', 'In-Progress', and 'Closed'. A blue box highlights the 'OR' connector between the first and second conditions. A red arrow points to the upward-pointing triangle next to this connector. A context menu is open, showing options: '+ New Line', '+ AND' (highlighted), '+ OR', 'Duplicate Group', and 'Delete Group'.

In the 'Select a Field' box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.

The screenshot shows the 'Conditions' panel with the following structure:

- AND
 - OR
 - File State equals New
 - File State equals In-Progress
 - File State equals Closed
 - Select a Field: general event, Incident, **General Event Type**

Select 'Equals' in the Operator box. The Value you select should be FALL.

The screenshot shows the 'Conditions' panel with the following structure:

- AND
 - OR
 - File State equals New
 - File State equals In-Progress
 - File State equals Closed
 - General Event Type equals FALL

This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

Now we need to add the last condition. The final condition will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care.

To add this condition, select the upward carot next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

+ New Line
+ AND
+ OR
Duplicate Line
Delete Line

Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL AND that happened to residents with the Current Level of Care of Skilled Nursing/Healthcare.

Conditions

Edit in Full Screen Copy Paste Clear Expression

AND

OR

File State equals New

File State equals In-Progress

File State equals Closed

General Event Type equals FALL

Current Level of Care equals Skilled Nursing/Healthcare

Now the report is ready to run. To run the report, click the green Run Report button at the bottom right.

Cancel Run report

Here is what the Report will look like:

Specific Fall Events Types - Skilled Nursing														
Resident's Name														
(Event Date (mm-dd-yyyy) is within Calendar 2019) and (((File State is equal to "New") OR (File State is equal to "In-Progress") OR (File State is equal to "Closed")) and (General Event Type is equal to "FALL") and (Current Level of Care is equal to "Skilled Nursing/Healthcare")) and (((Scope is equal to "All")))														
Event Date (mm-dd-yyyy) - Trend Month Name														
Specific Event Type	Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
during transfer	JANE SMITH	0	0	0			1		0		0	0		0
from bed	ANNA SMITH												1	1
	DDGF DFE						1							1
from bed Total							1						1	2
from low bed	BARES TOM					1								1
	POOH WINNIE					1								1
	SMITH JOE						1							1
from low bed Total						2	1							3
from motor vehicle	WILMA FLINTSTONE					1								1
from toilet/commode	ANN SMITH					1								1
	BILLY JOEL					1								1
	HUYEDF HJHYTR					1								1
	JESSICA "JOE" SMITH								1					1
from toilet/commode Total						3			1					4
from wheelchair	EDWARD "JASON" SMITH											1		1
	JERRY ROLLINGS					1								1
from wheelchair Total						1						1		2
other	DONALD DUCK											1		1
	JAMES DOLE				1									1
other Total					1							1		2