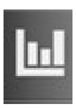
FSA PEER Support Services

Guidelines for Creating and Saving Reports in RL6/PEER

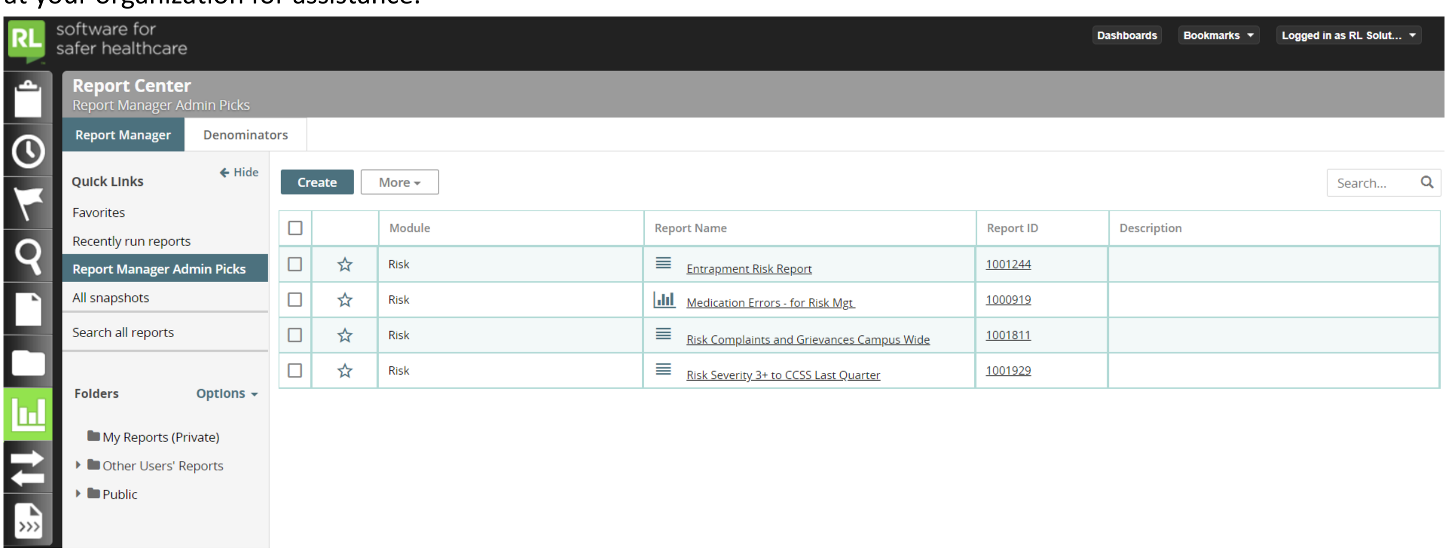
The following document takes you through the creation of two different types of reports that are available in PEER/RL6, a bar graph report and a simple list report. You will also be guided through running an existing report and making changes/adjustments, saving a report, and finding a saved report.   For additional assistance or training on creation of reports, please contact Linda to schedule training in person or via webinar.

Understanding the Report Center

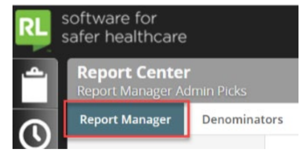


The Report Center in PEER is accessed by clicking the Report icon on the left side of the screen.

Only File Managers with Reports, Risk Managers and System Administrators are able to 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.

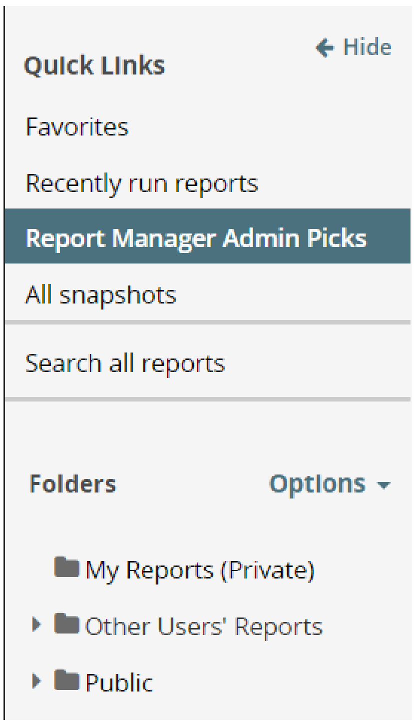


The above picture is the Report Center. The displayed Quick Link is your **Report Manager Admin Picks** – these are reports created by FSA Risk Management and accessible by all who have access to the Report Center. Click any of the Quick Links to see more reports available for use. When run, these reports will populate for you depending on your scope so you will not see information from other organizations in the program.



The Report Center contains two tabs at the top: Report Manager and Denominators. You can navigate between both tabs, but will predominantly work within the Report Manager tab.

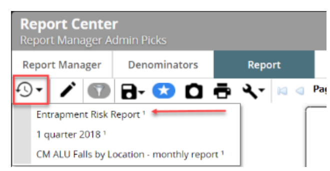
In addition to the **Report Manager Admin Picks**, there are three other **Quick Links** within the Report Manager.



The first Quick Link is **Favorites** and it contains all of the reports that you frequently access. To identify any report as a Favorite, click the star  icon to the left of  the report. Once selected, the star will become dark blue.

Recently run reports is the next Quick Link – this list of reports contains your session history. Access this Quick Link to retrieve previous versions of reports that you have run. Your session history is now saved even after you log out.

You can also access the last few versions of a report from the Report Editor.



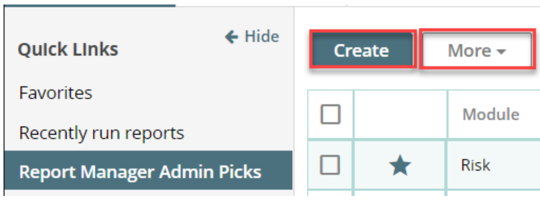
All snapshots Quick Link contains a list of all report snapshots, which are pdf images of the report.

Search all reports is the advanced search feature for searching reports.

Folders can be found at the bottom left corner of the Report Center. Each organization has a folder with their name on it, followed by ONLY. Please do not access reports from an organization other than your own. Although you can run the reports from another organization, it will only populate with data from your scope and you will be unable to view the data from others.

You can navigate through different folders to find reports that you have access to. Depending on your role, you may be able to create new folders and save reports to those folders.

The **Report Editor** is now accessible in each area of the Report Center via the **Create** and **More** buttons.



When creating a report, think clearly about what data you are looking to show and how you want to display it.

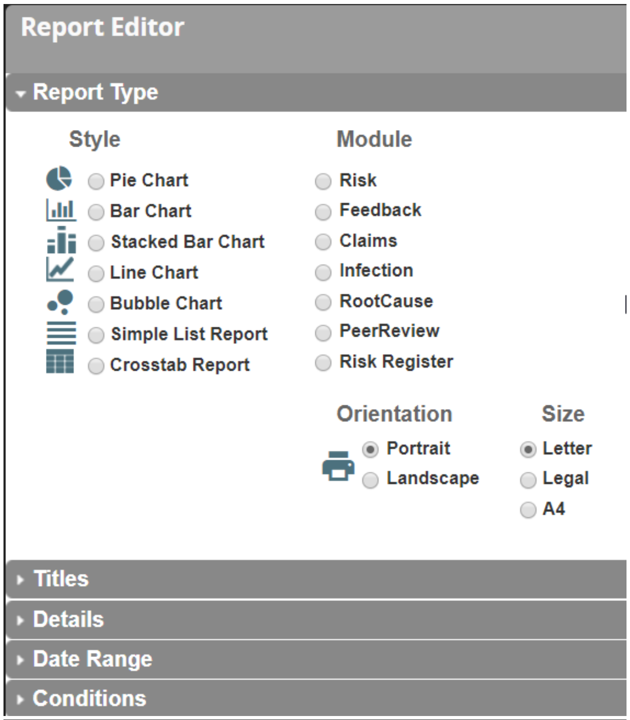
In our next example, we want to create a report that will show all of the falls that happened in Skilled Nursing based on what kind of fall they are for a certain period of time (a week, a month, a quarter, a year, for example). This would best be displayed in a bar chart where each bar will show the number of falls for that specific type of fall. Note that when creating a report in PEER, you will need to know field names so that the correct information will populate the report.
Hint: *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 Types (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 Bar 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.

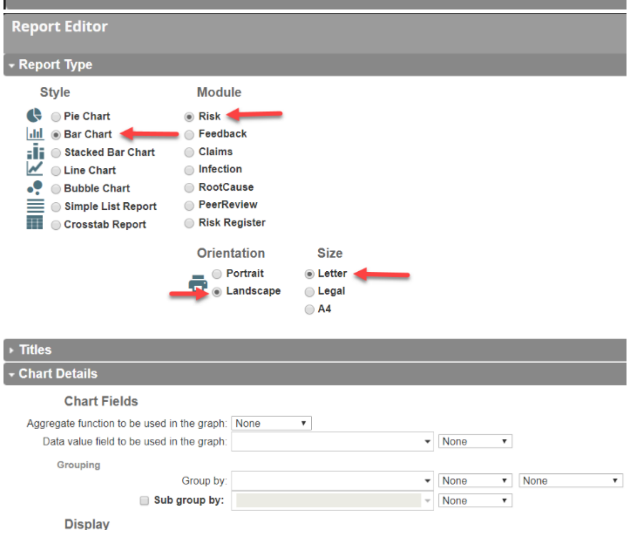
When you open Report Editor, you will see the following screen:



The five (5) different sections will need to be completed in order to run your report. The first report example in this document is a Bar Chart report titled *Falls by Specific Event Type in SNF.*

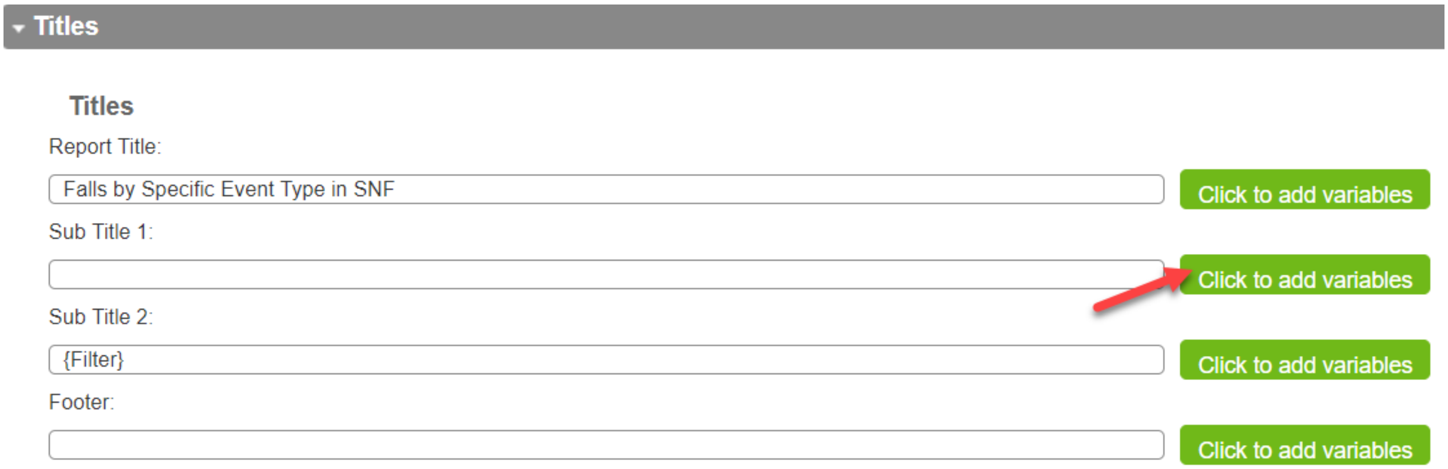
Remember – in order to open or collapse a section, click on the triangle next to the title. Some sections in the Report Editor will not open up until the preceding sections are completed.

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



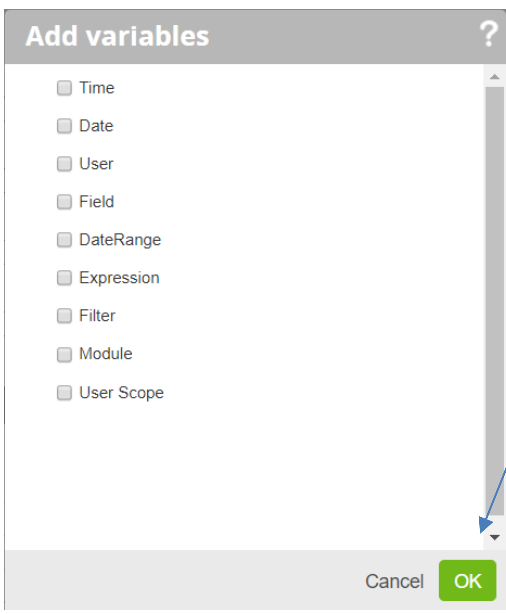
As you select the Style, you will see the Chart Details section automatically open with the different data fields that are available for that Style of report.

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.



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

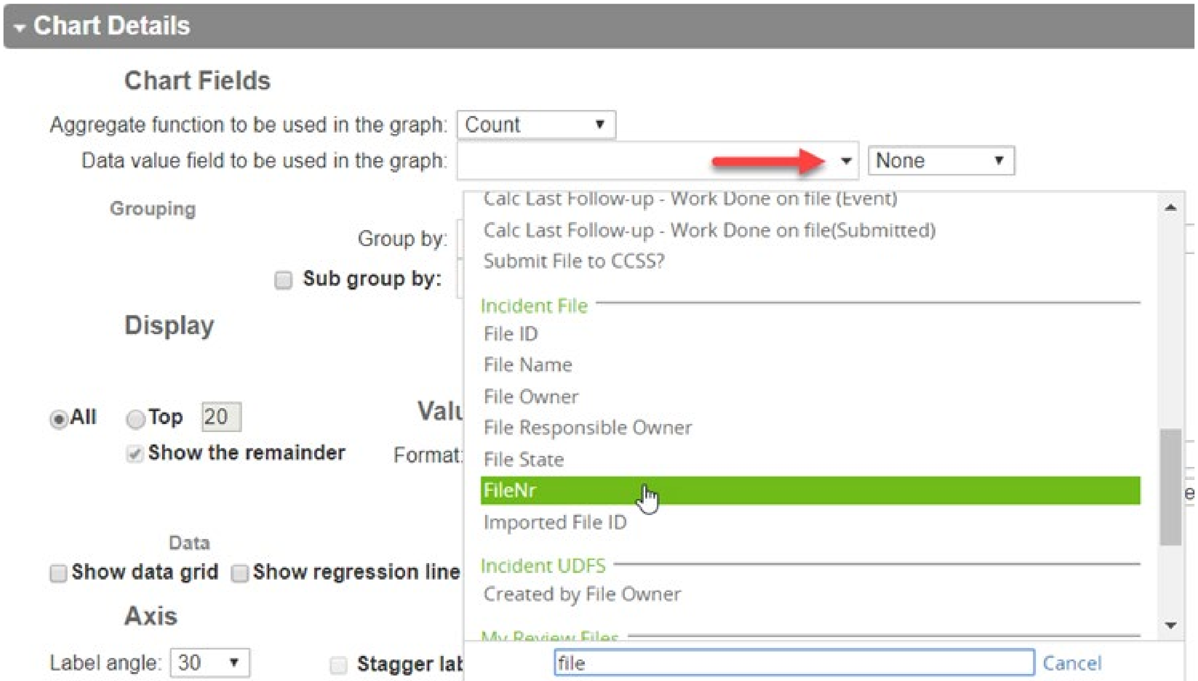
The Sub Titles are available for additional text such as date ranges, level of care, etc. You can also add variables (self-populating choices that are updated every time you run the report). We recommend adding the Date variable in the Footer text box so that the run date is shown each time you run the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



After clicking the green button "Click to add variables," (here) 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.

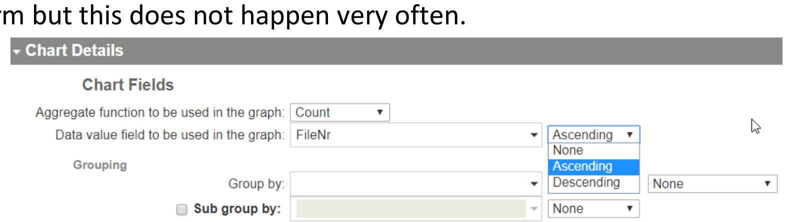
The Filter variable is automatically added in Sub Title 2 in the report template. To remove this variable, simply highlight it in the text box and delete the term {Filter}. To add the Filter variable back in, follow the directions above.

Next is the **Chart Report Details** section. Note that the heading changes depending on the Style of report you select. For this report example, *Falls by Specific Event Type in SNF*, we want the report to count the number of resident falls for each specific event type in the Skilled Nursing level of care.



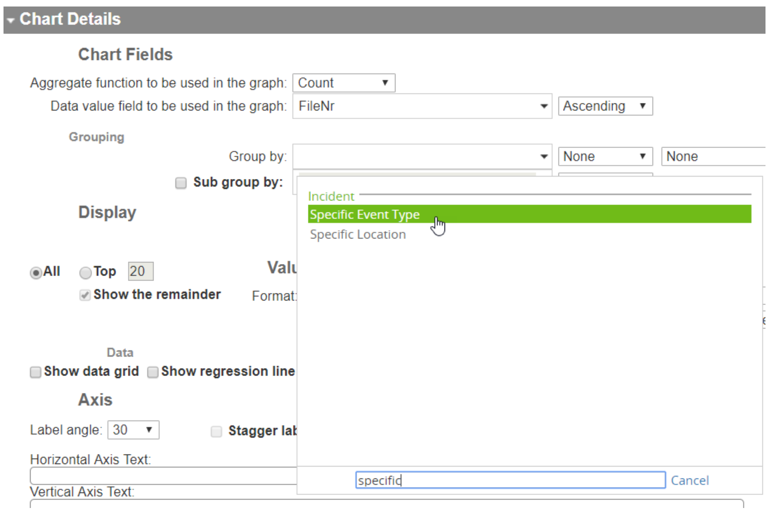
A Bar Chart report can count the number of files in certain categories. In the first field function, select Count. The data field that you want to count in PEER is FileNr (these numbers are all different, so it allows the software to count the number of individual files in the groups you select).

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 at all 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.



You can choose to make your bar chart show the numbers in ascending order by selecting this term in the box next to the Data value field – this will show the smallest number to the highest number. If not, it will sort by the terms in the group that you select.

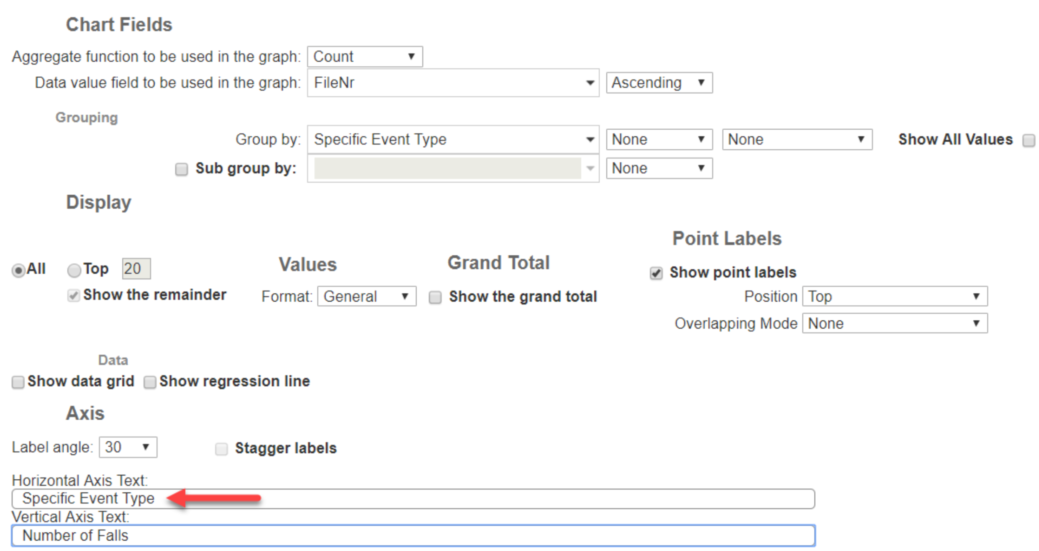
Now you select the Grouping. For this report example, *Falls by Specific Event Type in SNF*, we want the report to group the files by Specific Event Type.



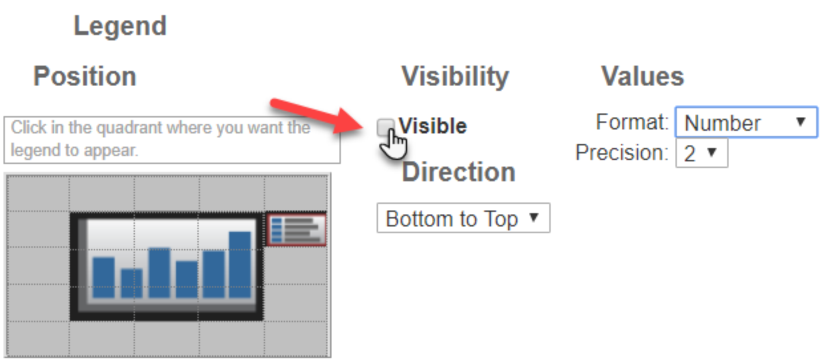
In the Group by: field, click the arrow and in the drop down box text field, start typing the grouping term you want to use, click the term and it will populate the field. In this report, we are grouping by Specific Event Type. Other ideas for grouping include by general location, event location, or location; by level of care; or by shift.

Note: if you choose to sort the data by ascending FileNr count, you should not also try to sort the group by ascending. Only apply ascending to either choice, not both.

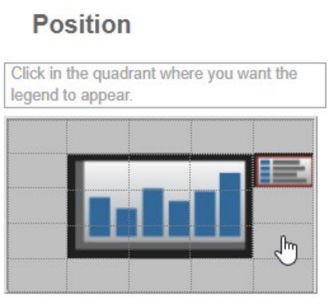
Now that you have the report counting the number of files (FileNr) for each Specific Event Type, you can select the Axis titles if you wish by typing them into the text boxes.



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



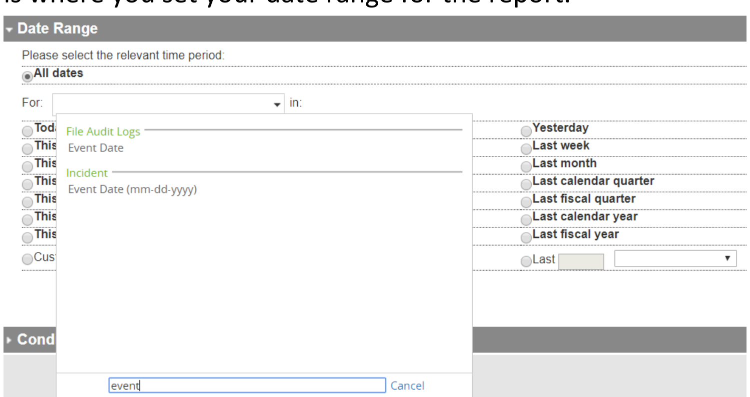
The Legend is the last part of this section. You can adjust the position of the legend on the grid, decide if the legend should be visible (will be explained further in a little while) and decide how the values will be shown (number format).



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 as shown above.

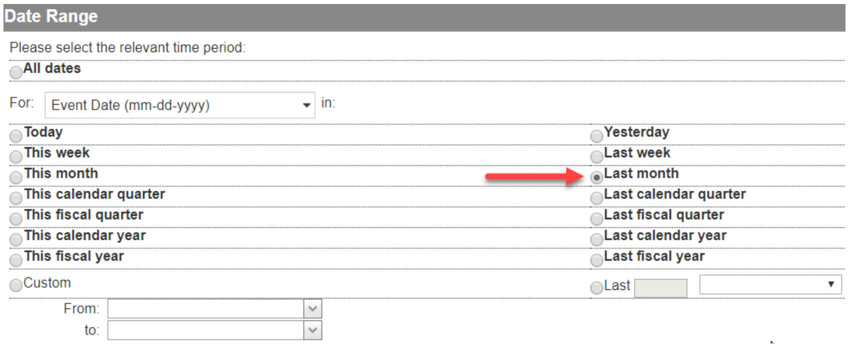
Now open the **Date Range** section by clicking the triangle next to the title. This is where you set your date range for the report.



You <u>must</u> first pick a date that the report will reference – the Event Date (in the Incident section) is what we recommend as it captures the date of the actual event, not when it was reported.

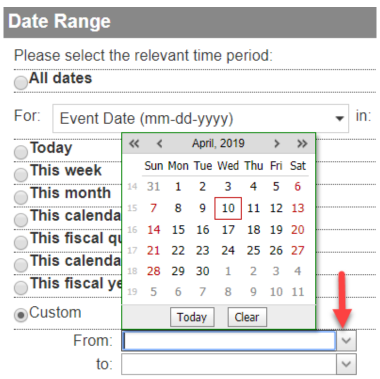
To select this, in the For: box click the triangle and in the text field at the bottom of the drop down box, start typing the term Event Date. Then select the term and it will populate the field.

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 Month:



This is a useful tool because if you select a date range such as Last Month, you can run the report (or set it as an auto report) on the first of each month and it will automatically capture the information from the prior month with no need to change dates yourself every time the report is run.

Or by setting a custom date range:

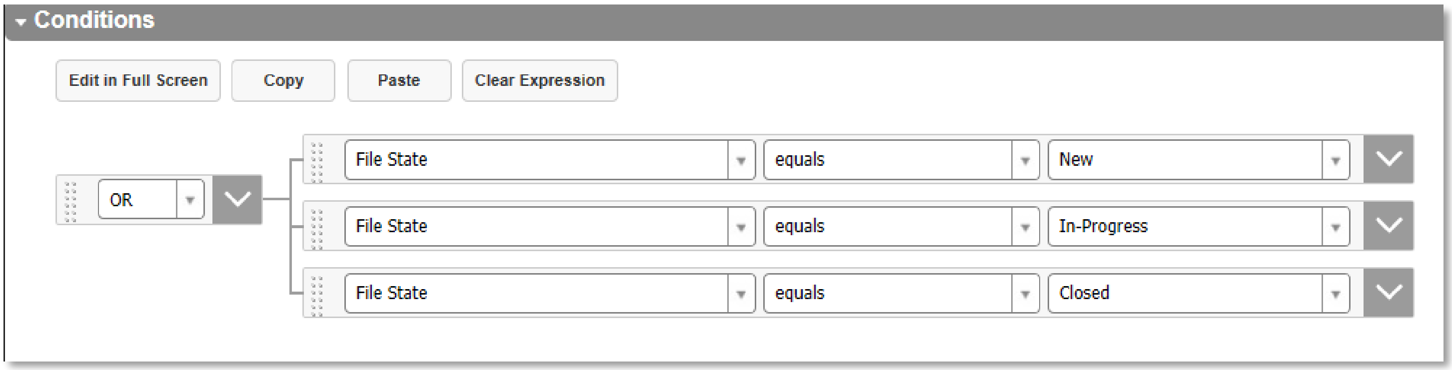


This is useful for one-time reports but do not use custom dates for an auto report because it will keep sending you the SAME information for the SAME date range unless you go back into the report and change the date every time, defeating the purpose of an auto report.

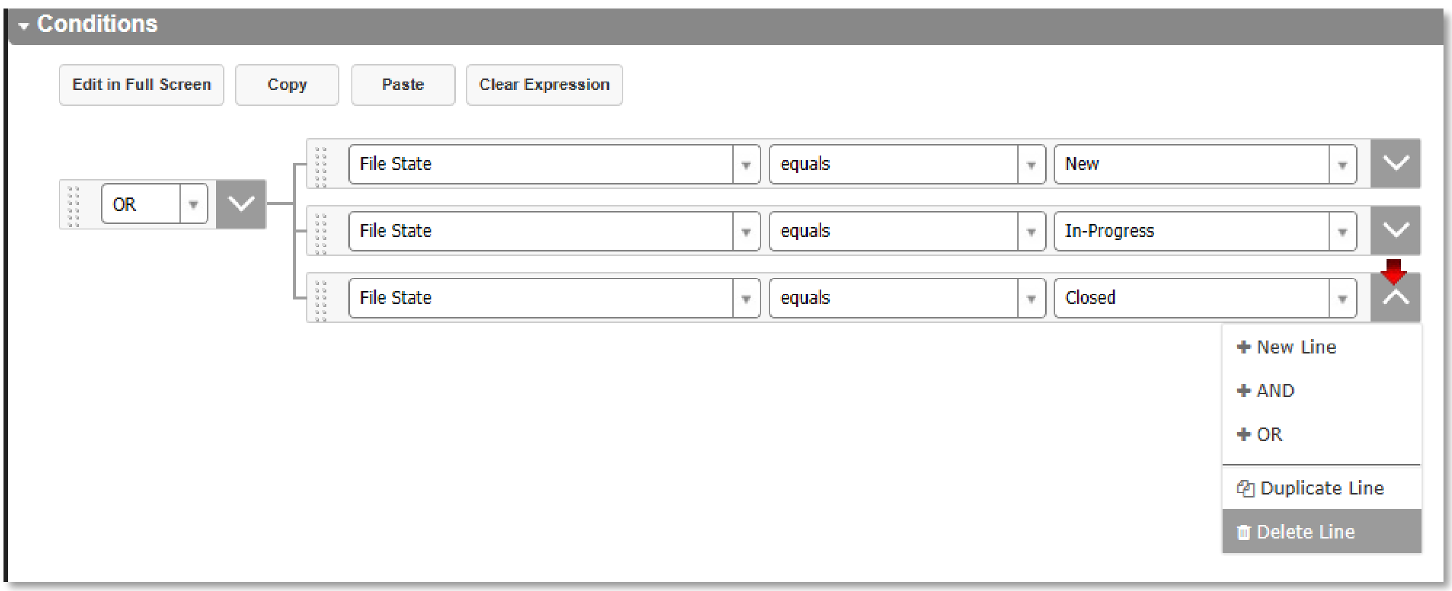
To set a custom date range, use the drop-down calendar function and click the correct From: and to: dates by using the calendar. The arrows next to the Month Year at the top of the calendar allow you to move to previous months (single arrow) or years (double arrow).

The final section to complete is **Conditions**. This is where you select the conditions that you want in the report. Conditions determine what files and information are captured in the report. For this Bar Chart, we want to “condition” the File State, General Event Type and Current Level of Care. Selecting and connecting conditions can be tricky and may take a couple of tries until you get the right conditions set. If you set conditions and they are not producing the information you desire, contact Linda and she will be happy to review the conditions and make sure they are set up properly.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed. A great way to remember whether you use the OR connector or the AND connector is OR gives you More (will give you more files), AND Bands them together (for example: you can’t have a file that is both New AND In-Progress – it has to be Or in this case). If the Condition was in the File State of New AND In-Progress AND Closed, it would give you nothing. Why? Files can’t be all those states at once. Remember, OR gives you More – it will give you files that are New OR In-Progress OR Closed – all the valid File States that you need!



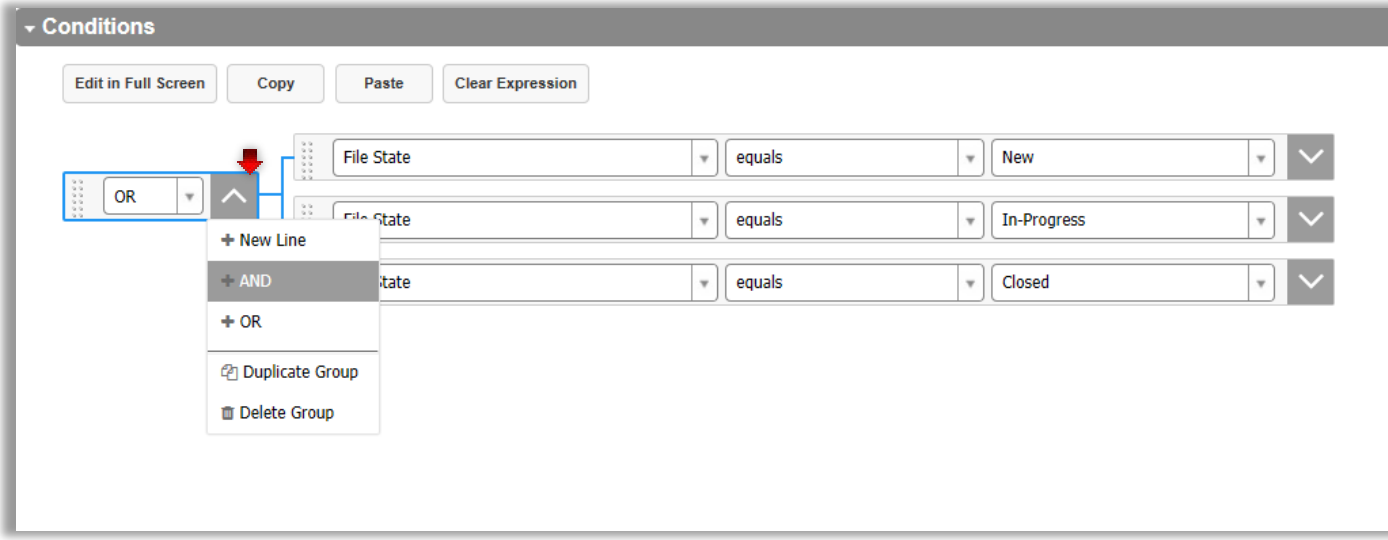
You can also have your File State Conditions be only Active Open files (New or In-Progress). To do this Click on the down carrot next to Closed and select 'Delete Line'.



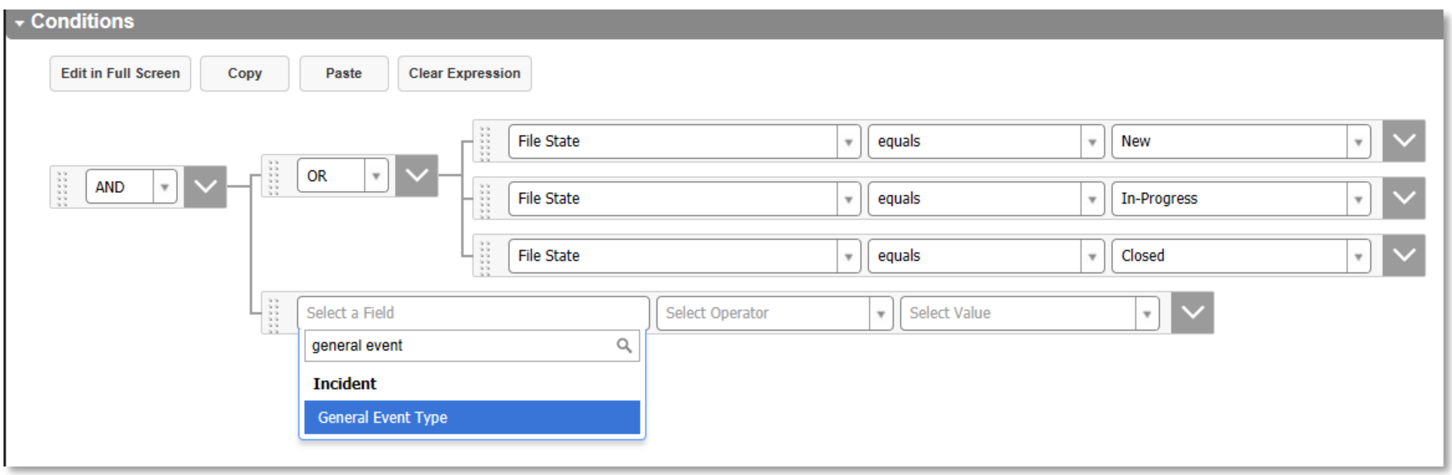
To add another file state to the condition set, select the down carrot next to any line in the condition set and select 'Duplicate Line' and select the additional file state.

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.

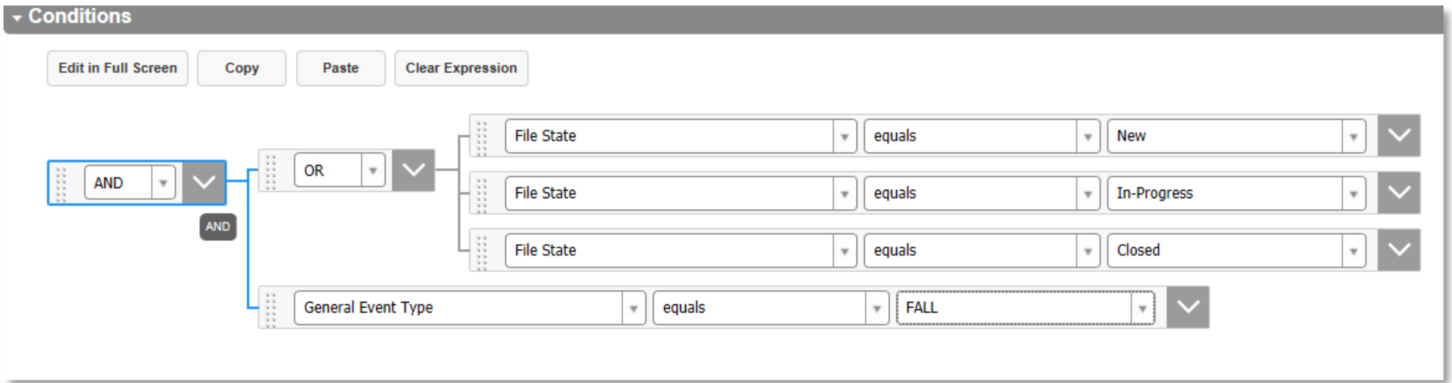
To add a condition, click on the upwards carrot next to the OR connector and select AND.



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



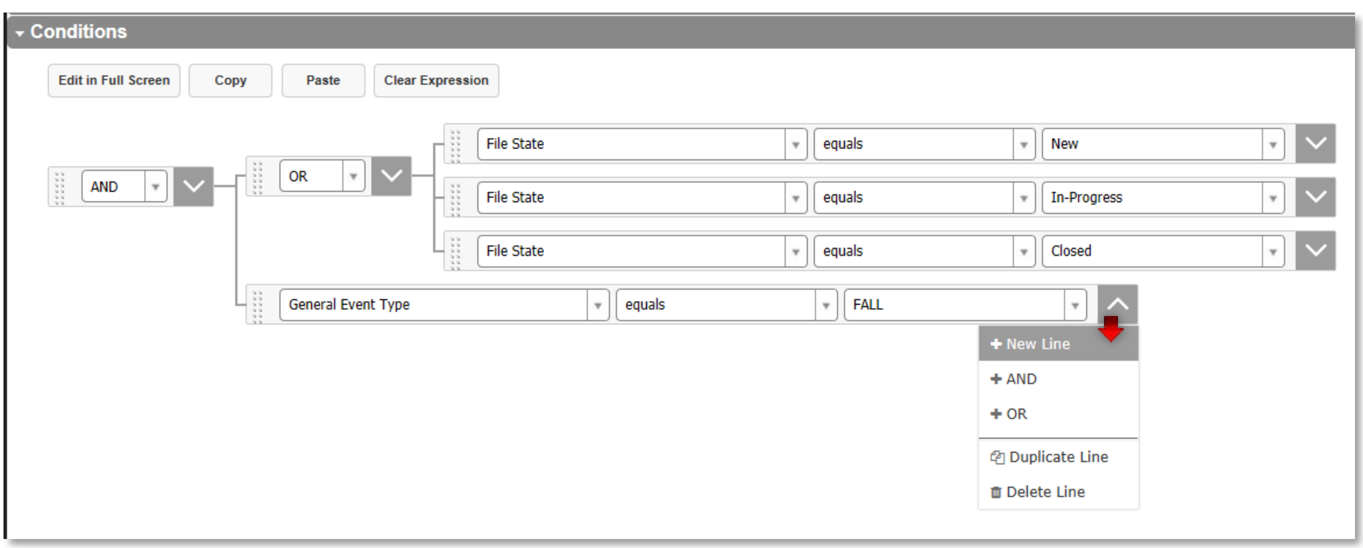
Select ‘Equals’ in the Operator box. The Value you select should be FALL.



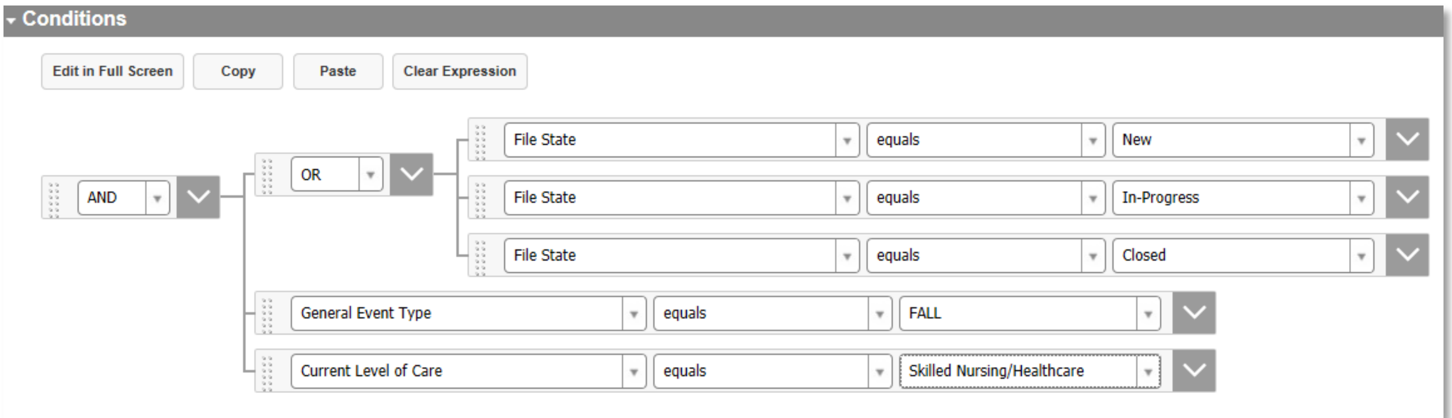
This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

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 level of care. Remember that everything in PEER is based on conditions, including scope. So, if your scope only allows you to view SNF events, then you don't need this last condition, because that's all you are able to access in PEER. If your scope is broader and allows you to view events that are for more than one level of care, then this condition to limit the report to SNF events only is required.

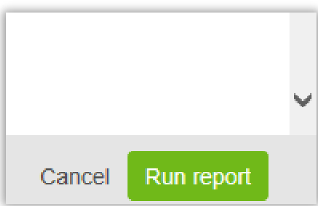
To add this condition, select the upward carrot next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.



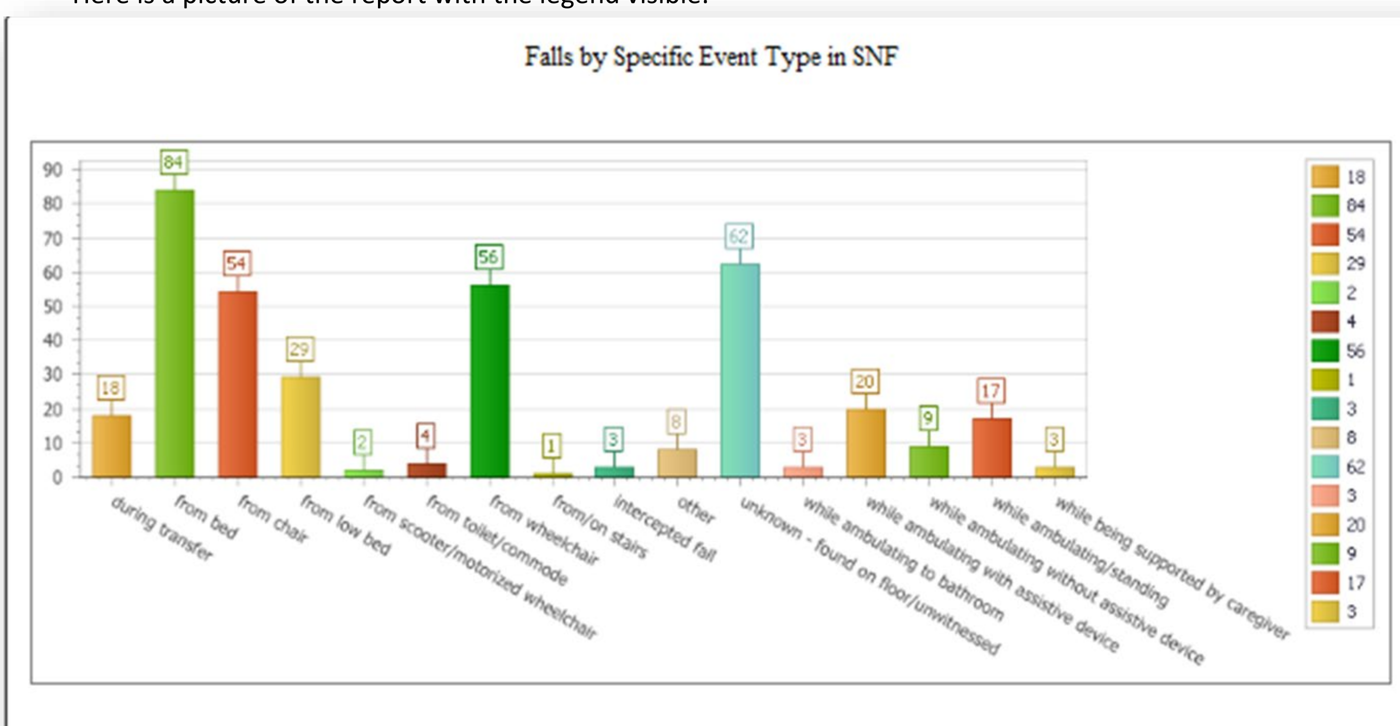
Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed <u>AND</u> that are the General Event Type of FALL <u>AND</u> that happened to residents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



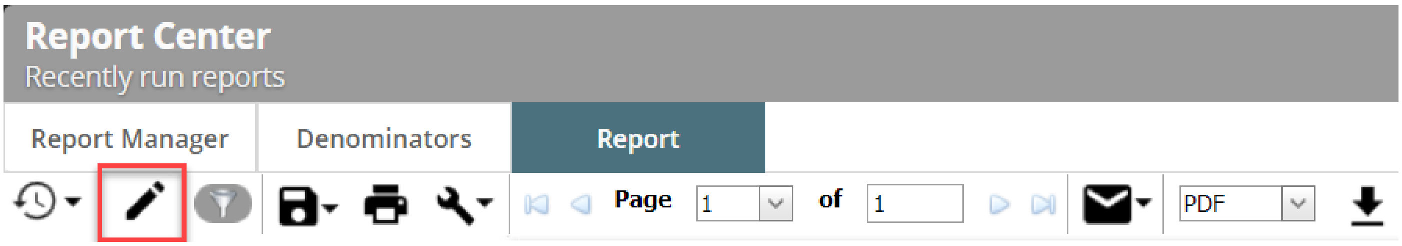
Now the report is ready to run. To run the report, click the green Run Report button.



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



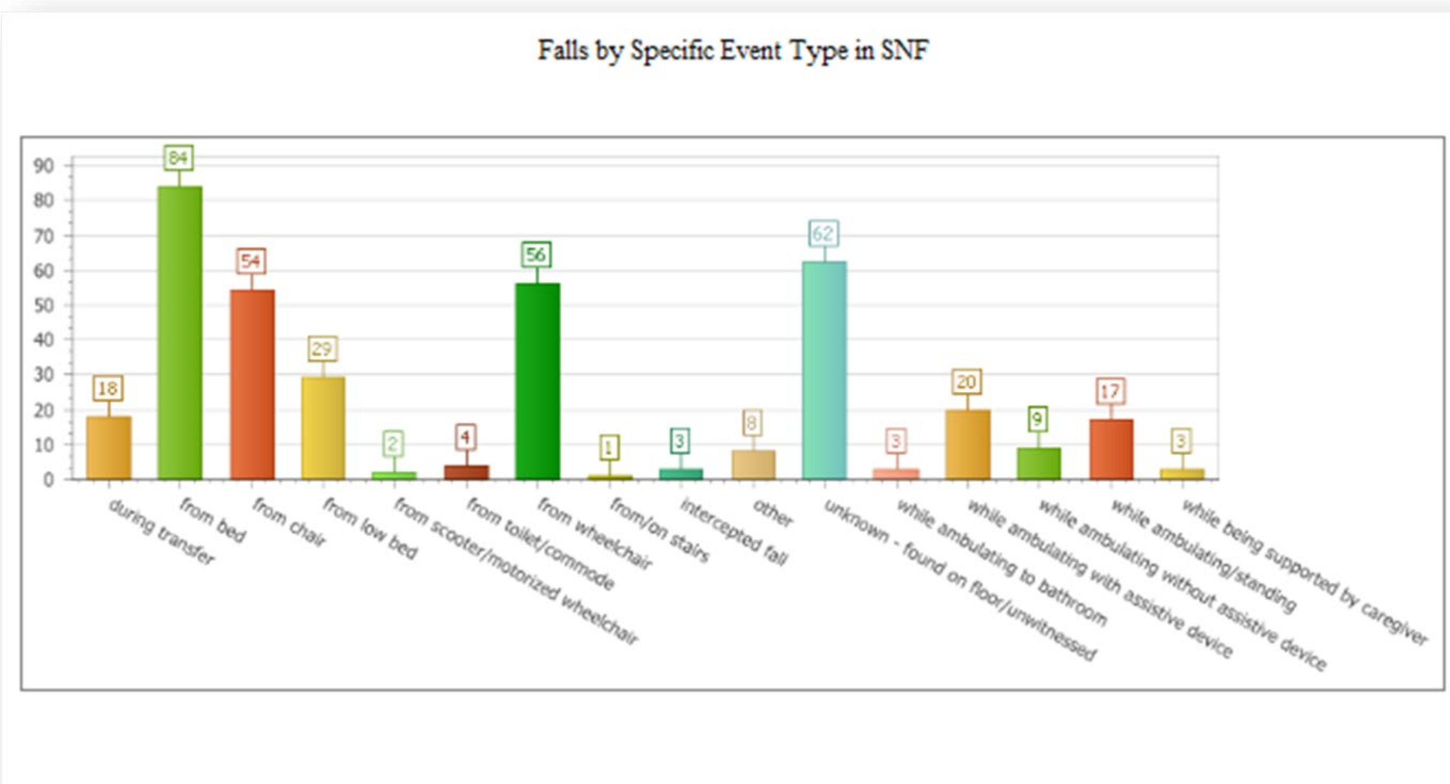
In this case, the legend is not offering information that is terribly helpful and it is taking up room on the page. To remove the legend, or to do any adjustments to the report, you need to go back into the report through the Report Editor button. This button is in the pencil icon at top left.



After clicking the Report Editor button, the report will open again and changes can be made in any of the five sections.

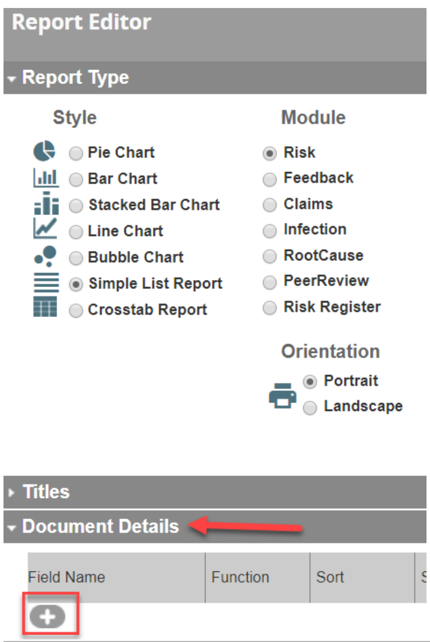
To remove the visibility of the legend, go to the Chart Report Details section and find the Legend Visibility checkbox. Uncheck the box so that it is empty. The legend will disappear from the grid in the Report Editor as well. Now click the green Run Report button again.

This is the report without the legend.



Creating a Simple List Report

To create a Simple List report, the beginning is the same. Click on the **New Report** button within the Report Center. This Simple List report will track the event date, event number, resident name, current level of care, and reported event severity for falls that occurred Last Month.

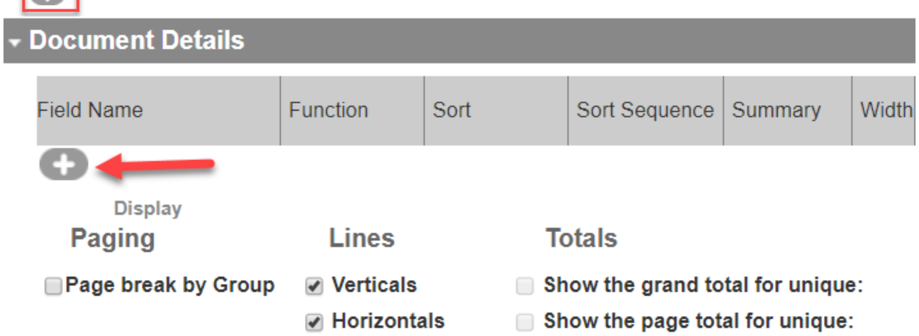


In the Report Type section, select your Style and Orientation (select the module "Risk"). The Style for this report is Simple List Report. Note that when you select this Type, the Report Details section title becomes the Document Report Details.

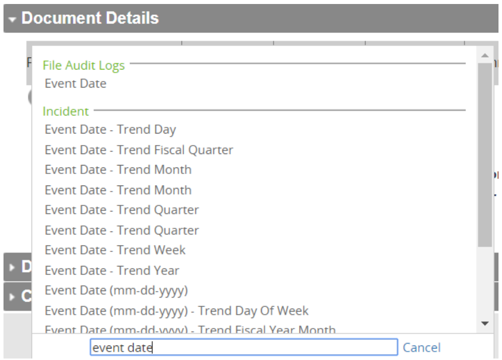
In the **Titles** section, type in your title(s) and variables as noted in the Bar Chart directions.

In the **Document Details** section, the information requested is different than that of a Bar Chart. Fields should be added based on the information you want listed in the report.

To add a field, click on the plus sign (+) below the Field Name bar.

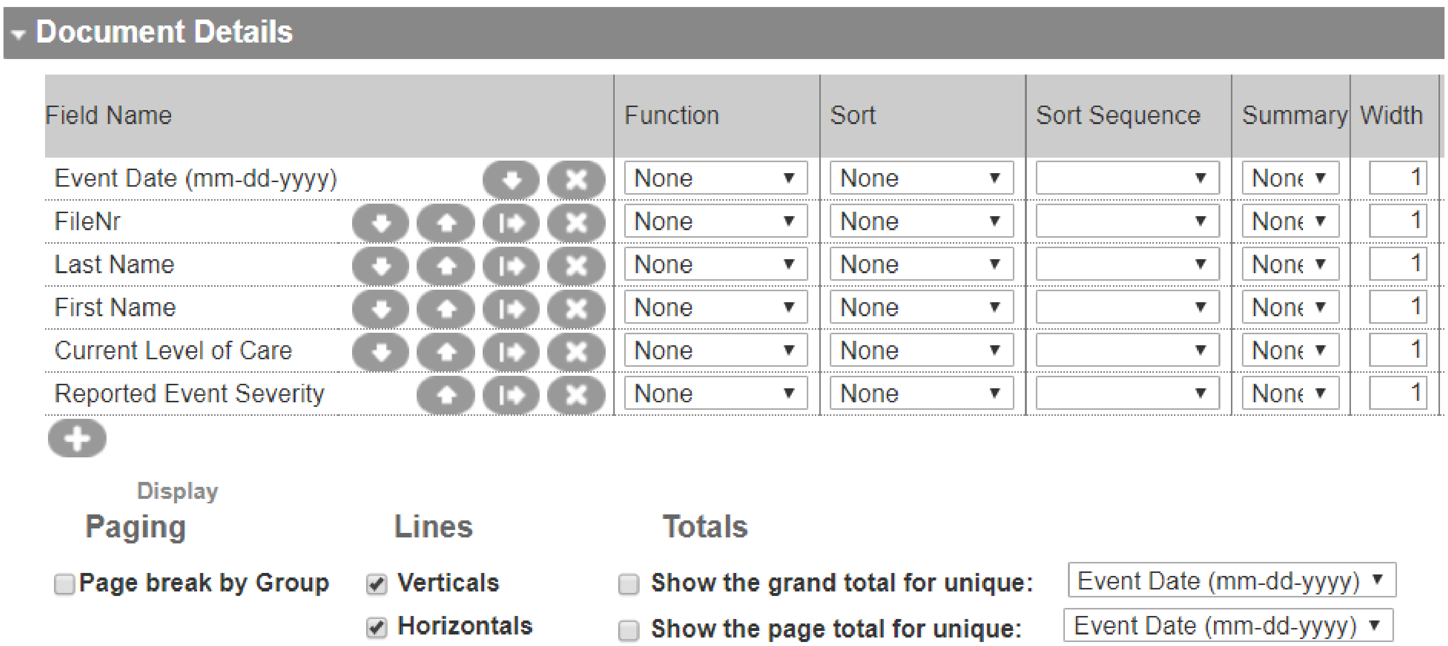


Type the term you want to find in the text field at the bottom of the drop down. The first field in this report is Event Date. Highlight the term when you locate it and click it to populate the field.



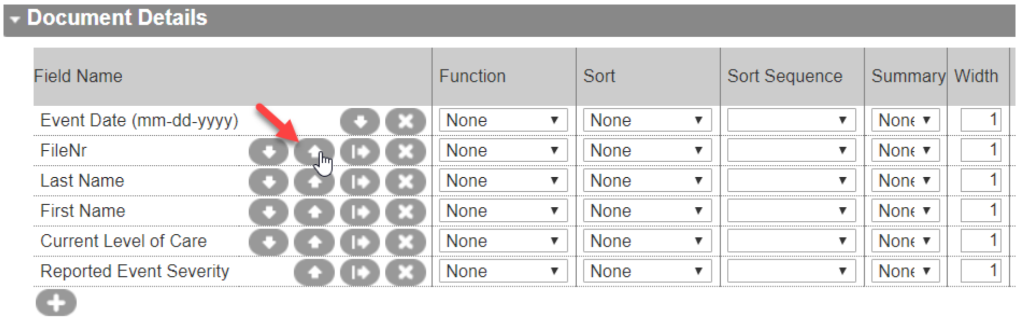
There are a lot of choices for Event Date in this drop down! For the purposes of the Simple List Report, only the basic Event Date (under the heading "Incident") is necessary. The other choices can be used for trending, but this is a more advanced function. For more information on how to capture trending information, contact FSA PEER Support Services for additional help and training.

Once the field has been added, continue to add the fields necessary to complete the information in the report.

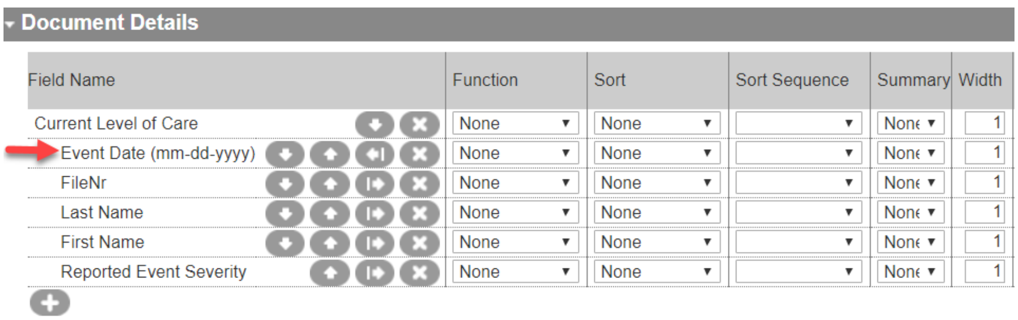


Note that the term for the Event Number is FileNr and that the *Last Name* and *First Name* are separate. Using both Last and First Names allows you to sort alphabetically. If you choose the term "Name" it will show the resident's full name but will sort alphabetically by the first name only.

You can group information together by using the tabs indicated in the Report. You can also change the order of the information by clicking on the arrows pointing up and down. To change the information so that it groups the resulting list by Current Level of Care, move the field up to the top and then tab over right below that term as noted below.



Click the Up Arrow button to move the field to the top.

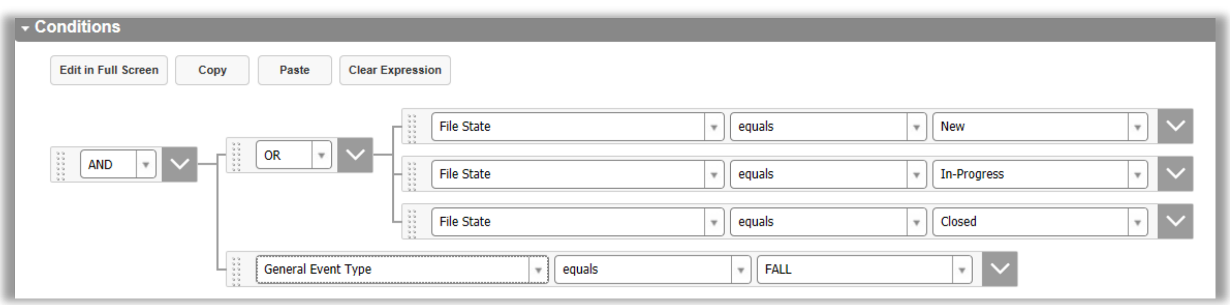


Click the Indent/Tab button next to the field when you want to start to group the information.

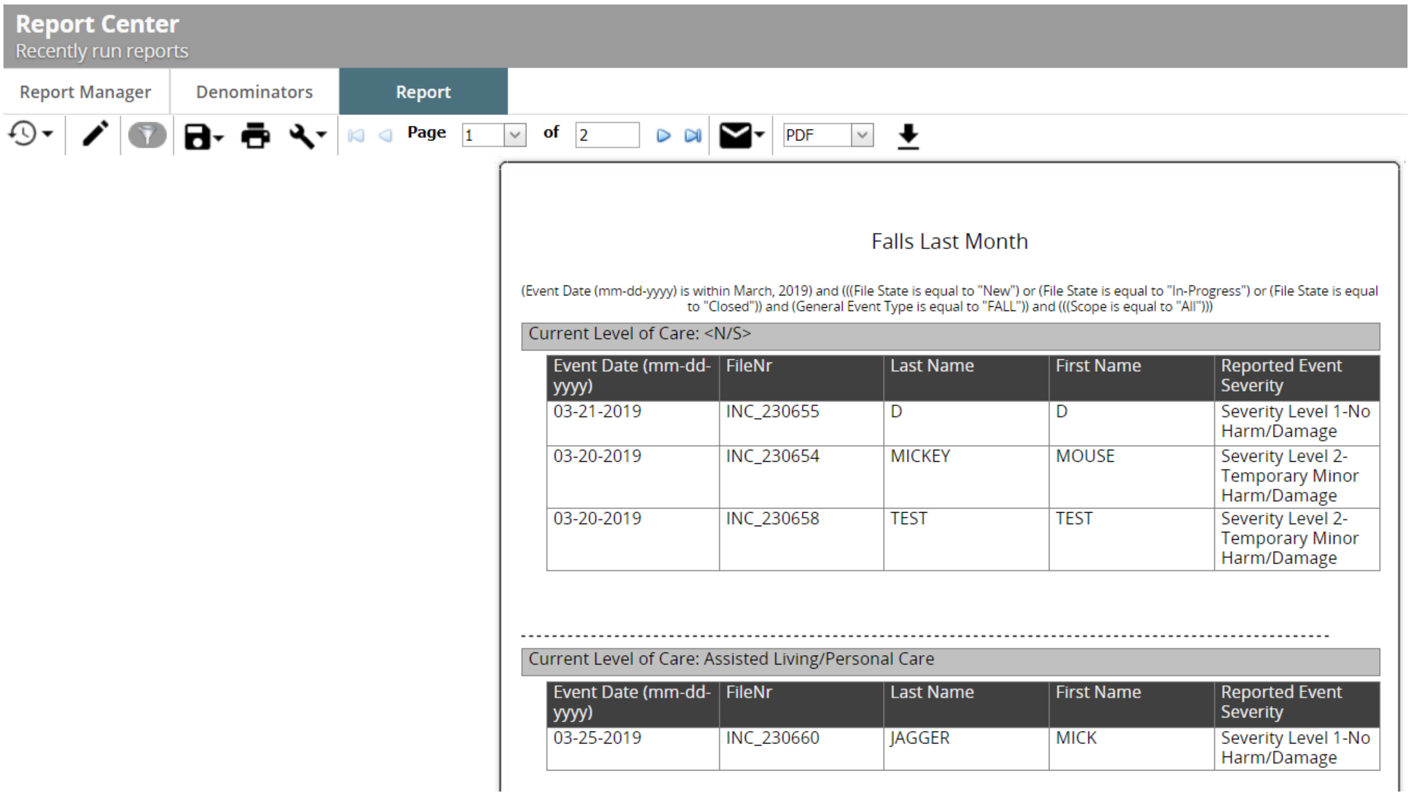
Fields can be added or adjusted (moved up, down or grouped) after the report is run by entering the Report Editor button and making the adjustments. Sometimes it is helpful to see how the information looks before you make adjustments.

Next complete the **Date Range** section. Remember to complete the For: field and indicate the time period that should be captured for the report. In this report, the Date Range is Last Month.

Finally, complete the **Conditions** section. The conditions for this report will be a valid file state (New, In-Progress or Closed) with the General Event Type of FALL.



Run the report by clicking the green Run Report button. This is a sample of what you may see. Note that the events are grouped by Current Level of Care and that there are 23 pages in this report.



Falls Last Month

(Event Date (mm-dd-yyyy) is within March, 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 (((Scope is equal to "All")))

Current Level of Care: <N/S>

Event Date (mm-dd-yyyy)	FileNr	Last Name	First Name	Reported Event Severity
03-21-2019	INC_230655	D	D	Severity Level 1-No Harm/Damage
03-20-2019	INC_230654	MICKEY	MOUSE	Severity Level 2-Temporary Minor Harm/Damage
03-20-2019	INC_230658	TEST	TEST	Severity Level 2-Temporary Minor Harm/Damage

Current Level of Care: Assisted Living/Personal Care

Event Date (mm-dd-yyyy)	FileNr	Last Name	First Name	Reported Event Severity
03-25-2019	INC_230660	JAGGER	MICK	Severity Level 1-No Harm/Damage

Here is the report after going in to the Report Editor and changing the orientation to Landscape. Note: the N/S on Current Level of Care means there was no level of care, so these are visitor, volunteer or affiliate events which don't have a level of care. If you wanted to only show resident events, you could add the condition of Classification of Person (field name) equals (operator) Resident (only resident events, not those that are visitors, volunteers or affiliates).

Falls Last Month

(Event Date (mm-dd-yyyy) is within March, 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 (((Scope is equal to "All")))

Current Level of Care: <N/S>

Event Date (mm-dd-yyyy)	FileNr	Last Name	First Name	Reported Event Severity
03-21-2019	INC_230655	D	D	Severity Level 1-No Harm/Damage
03-20-2019	INC_230654	MICKEY	MOUSE	Severity Level 2-Temporary Minor Harm/Damage
03-20-2019	INC_230658	TEST	TEST	Severity Level 2-Temporary Minor Harm/Damage

Current Level of Care: Assisted Living/Personal Care

Event Date (mm-dd-yyyy)	FileNr	Last Name	First Name	Reported Event Severity
03-25-2019	INC_230660	JAGGER	MICK	Severity Level 1-No Harm/Damage

Reports and Scopes

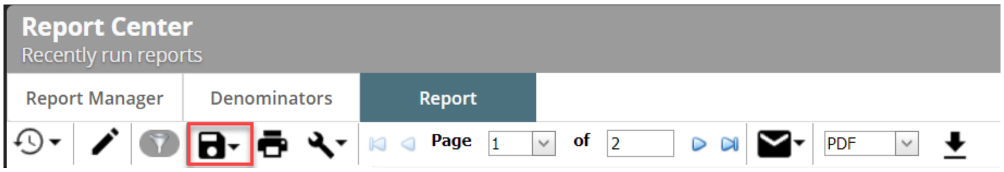
Every file manager has a scope in PEER. The scope determines what the file manager can see and is based on organization and levels of care or locations within the organization. When running a report, the report will only populate with the information allowed within the scope of the person running the report. If someone with the scope of all levels of care creates and saves the report, when another file manager runs the report it will only report information allowed within his/her scope.

Save a Report

Once the report contains the information you intended, you can save the report. It is very important that you pay attention to how to name your report and what folder to use when saving it.

When you have created a report and run it or run a report that someone else created and want to save it to use for yourself, it must be saved in your organization's specific folder.

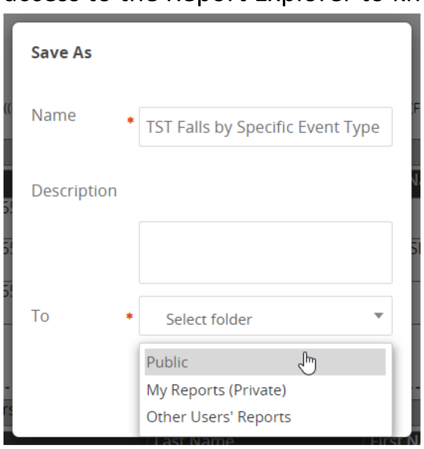
The Save button is located at the top of the page once you have run the report.

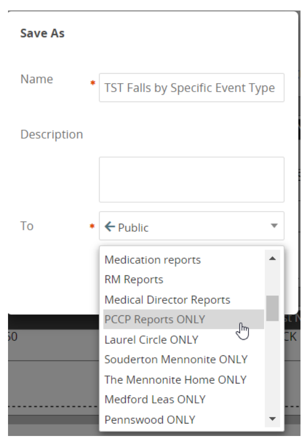


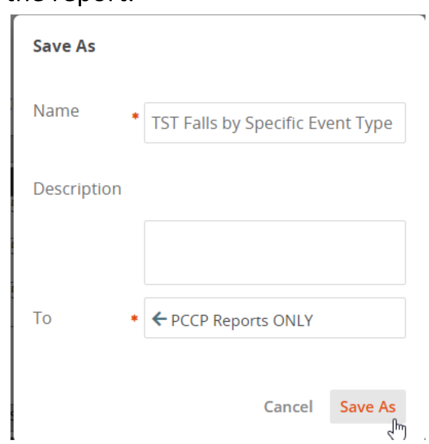
Click the Save button to name the report and place it in the folder of your organization.

Everyone who is a file manager with reports has access to the report folders. Each organization has its own folder in the report center found in the Report Explorer. Only access reports that are in your organization's folder or that are in the public folders named Falls, Medication or RM reports.

When naming your report, ALWAYS put your initials first. This allows everyone at your organization that has access to the Report Explorer to know who created and "owns" the report.

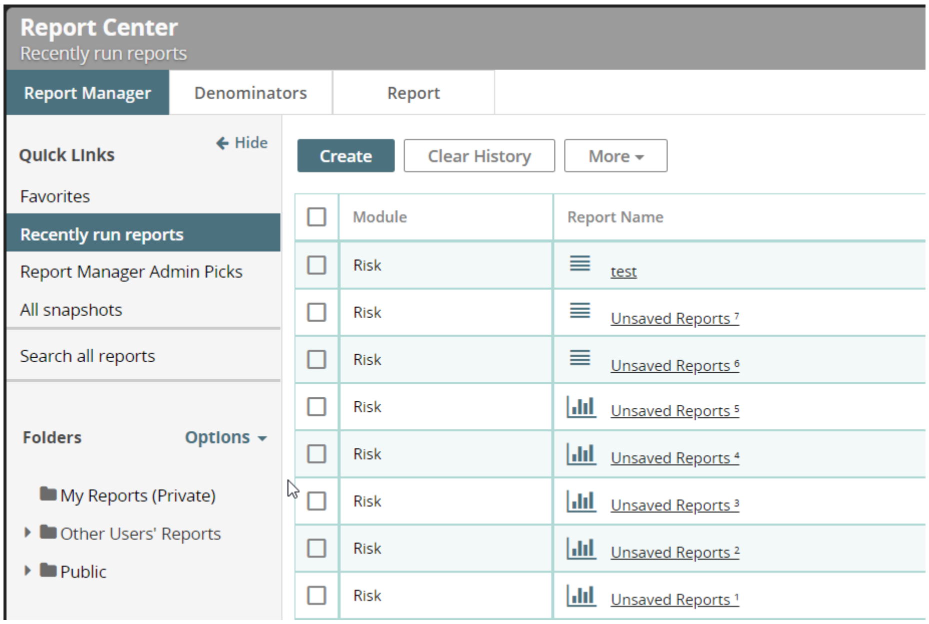






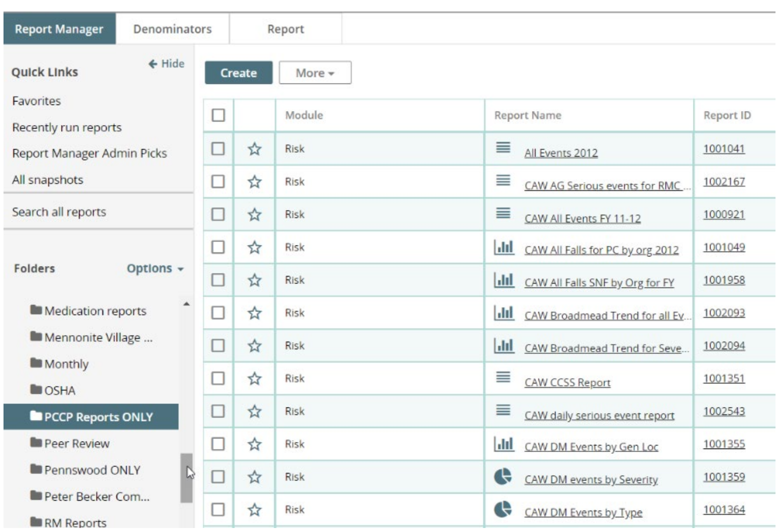
When the **Save As** box pops up, you will always select Save as a new report. Type in the report name – using your initials first – and then select the dropdown beside "To". Click on the folder it belongs to. When saving a report, you do not have to open the folder, just click on the folder name and the report will be saved there.

DO NOT click Overwrite an existing report – this will replace the existing report with your name and can cause a problem if that report is owned by someone else or if it is used in an auto report. Once you have saved your report, it will take you back to the screen with the report.



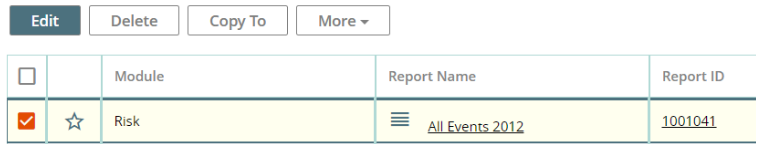
If you then click on the **Report Manager tab** and select the **Recently run reports** Quick Link, you will see each version of the report in your Session History.

Find a Saved Report

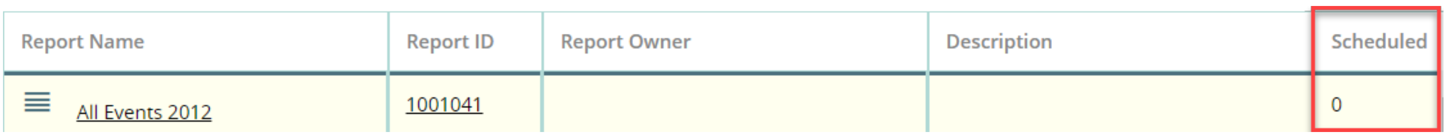


To locate and run a saved report, go to the Report Center. In the Report Center, click on the **Public** folder to expand and see the subfolders. Select the folder containing the name of your organization. Once you have selected the folder, a list of the reports in that folder will show in the main display area of the Report Center.

Find the report you wish to run and click the report name to run it. If you would like to edit the report without running it, click the checkbox to the left of the report and then select Edit from the top of the screen. The Edit button only becomes available when a box beside a report is checked.



Note that there is a column with the word Scheduled on the right.



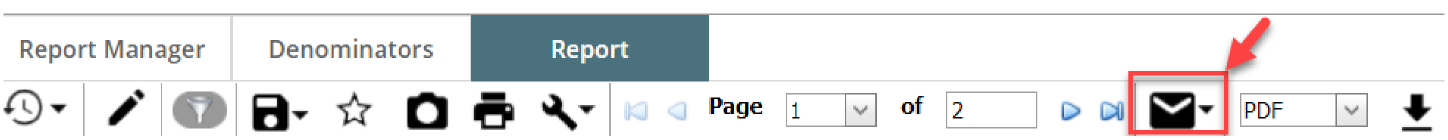
If there is a number in this column, this is a report that is set up in a schedule to be sent to a recipient list established by your Risk Manager or by the FSA Risk Management program. Do not overwrite ANY of these reports unless you are the owner and wish to change the format at the request of the recipients.

Export a Report

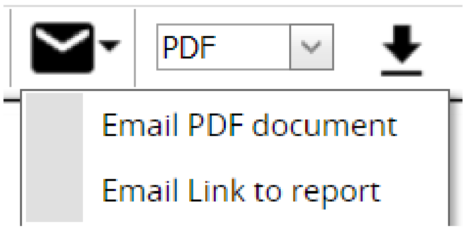
There are different ways you can export a report from PEER. You can:

1. Send a report by email as a link or as an attachment
2. Export a report and save it to your computer
3. Export data source

To send a report by e-mail as a link or as an attachment, click the Send report by email button.



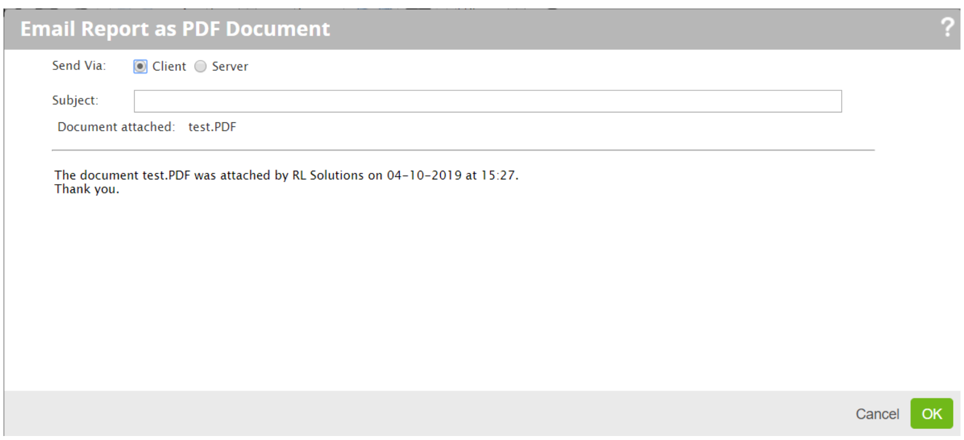
A box will pop up with the following choices:



If the recipient of the report is not a file manager in PEER or if he/she does not have scope to see everything you want him/her to see in the report, choose Email PDF document.

If the recipient of the report is a file manager and has the scope to see everything you want him/her to see, you can select Email Link to report.

Please note – If you are e-mailing this report as a PDF to someone outside of PEER and it contains PHI (Protected Health Information), be sure that you follow your organization's policies on HIPAA Privacy and Security, and send it encrypted if required. Bar and Pie Charts often do not contain PHI but list reports most likely will.

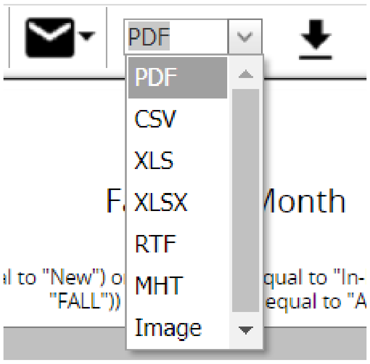


Once you select PDF or Link, the following box will appear. We recommend Send Via Client (default setting). A pop up box will appear on the bottom (like it does when you email follow up in a PEER file) and when you click open, it will take you to Outlook where you can type in the recipient's name. If not, select Send Via Server and PEER will send the report to the e-mail addresses you type in the To: field. You must also complete the Subject field before clicking OK.

When e-mailing a report, the reason to select Send Via Client, if your e-mail functionality is set up, is that you will have a send receipt in your Outlook mailbox that the report was sent.

Note: The pop-up box will not go away once you have selected OK and e-mailed the report. This pop-up function allows you to send the same report to additional individuals but can be confusing when it doesn't go away after clicking Send in Outlook. You must click Cancel to exit the pop-up.

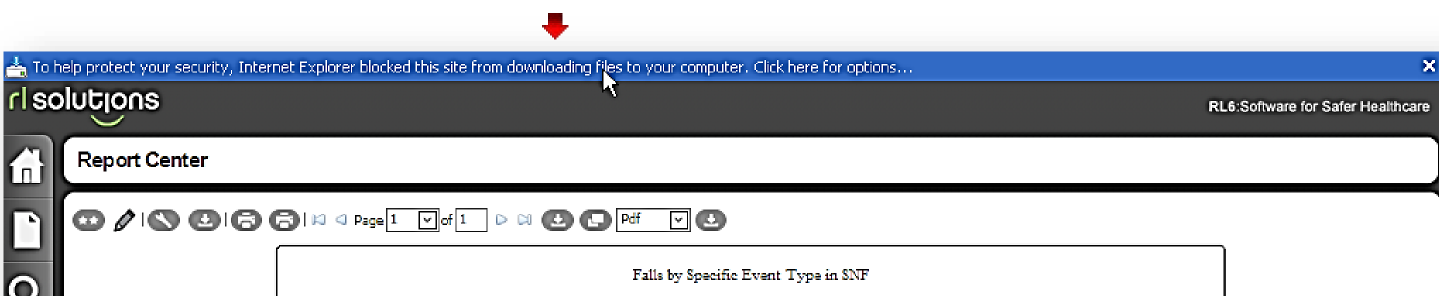
To export a report and save it to disk, select the file type you want to export:



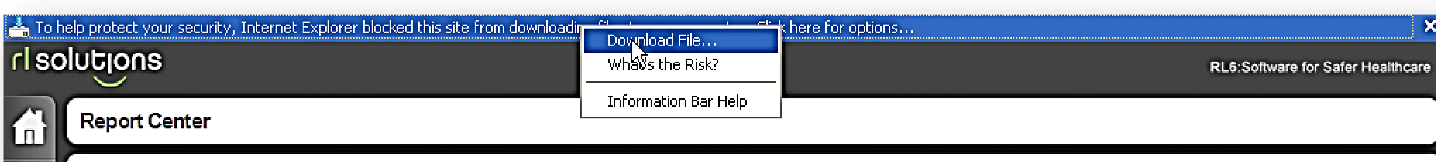
The three most common file types used are Pdf, XLS and Image. Pdf is an Adobe Acrobat PDF file, XLS is an Excel spreadsheet and Image is a picture file.

Now click the following button:

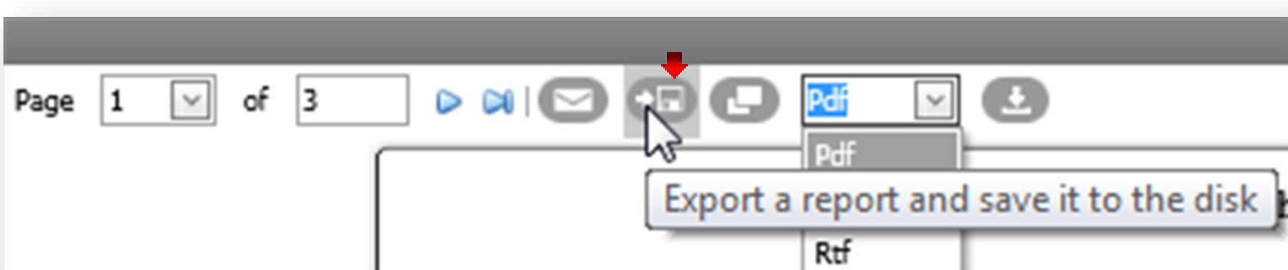
You should immediately get a security notice (and hear a little blip sound) when you click to export the report. It will look something like the blue bar at the top of the screen below OR a yellow pop-up box down at the bottom of the screen:



Click on the bar and select the choice of Download File. The bar will disappear.

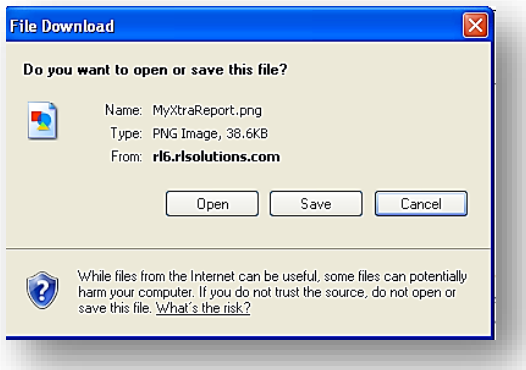


Now you select the export file type again and click the same Export button:

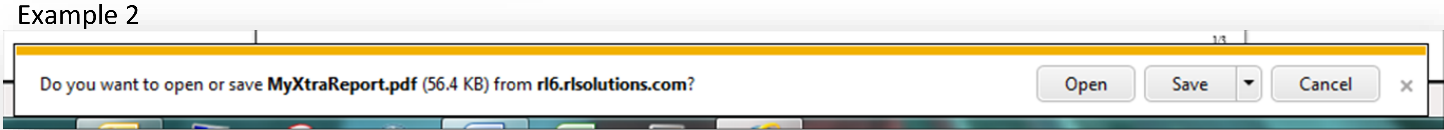


You will see a grey pop up box that will prompt you to Open or Save (Example 1) OR you will see a yellow box appear at the bottom of the screen (Example 2). You can choose to open it and view it before saving the file or just saving it in a folder on your computer.

Example 1

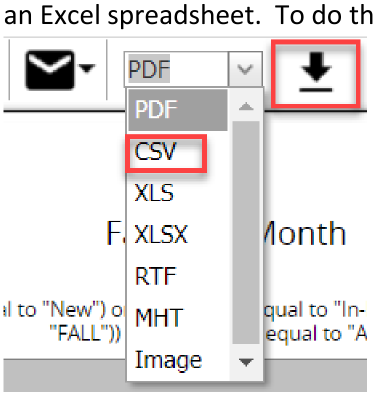


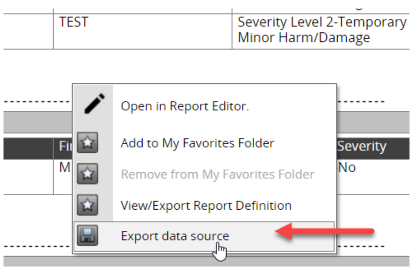
Example 2



This will allow you to access the information later or to use the exported file to include in another document such as a Quality or Risk Management meeting report.

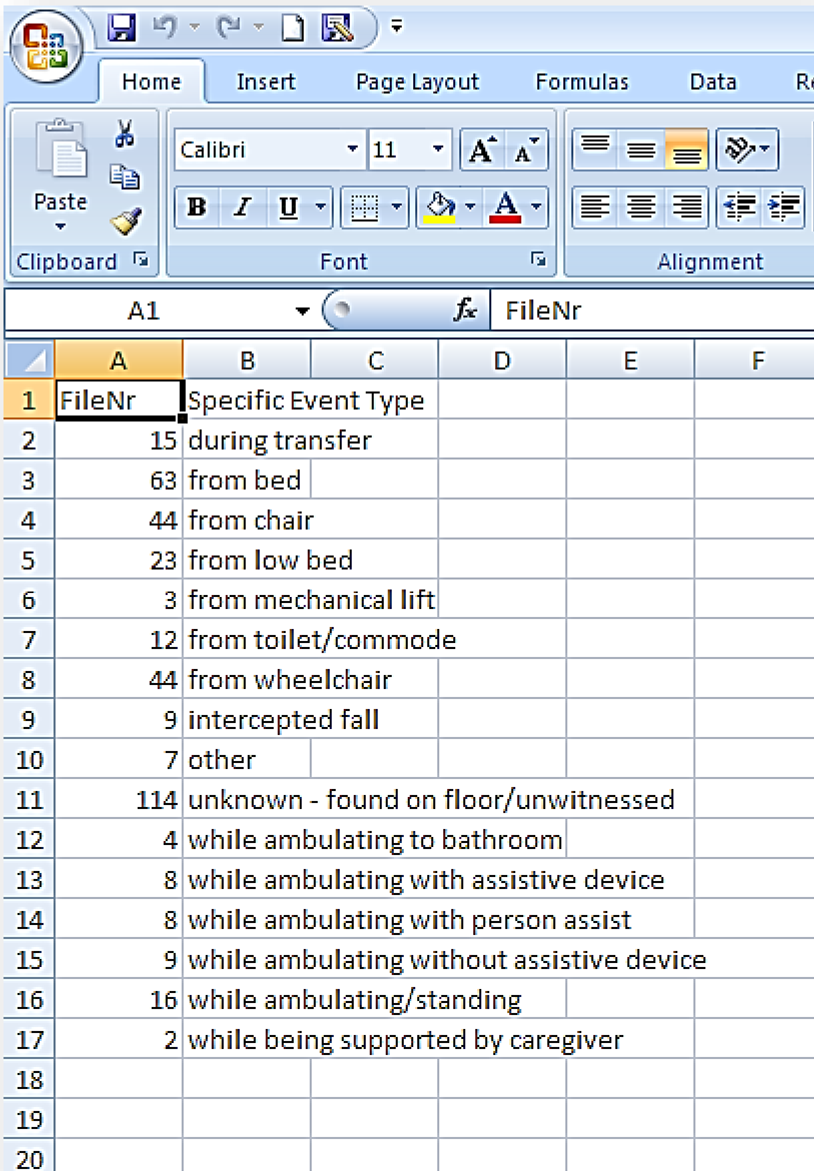
The final choice in this guide is Export data source. This allows you to export the data only from a report into an Excel spreadsheet. To do this, select the CSV file type. Click on the arrow button indicated below:





Alternatively, you can also right click on the report from the Report Center and select **Export data source.** This will achieve the same outcome, however, any extraneous text will be left out and only the data and column/row labels will be included.

For the *Falls by Specific Event Type in SNF* bar chart, the data will populate in the spreadsheet like this:



	A	B	C	D	E	F
1	FileNr	Specific Event Type				
2	15	during transfer				
3	63	from bed				
4	44	from chair				
5	23	from low bed				
6	3	from mechanical lift				
7	12	from toilet/commode				
8	44	from wheelchair				
9	9	intercepted fall				
10	7	other				
11	114	unknown - found on floor/unwitnessed				
12	4	while ambulating to bathroom				
13	8	while ambulating with assistive device				
14	8	while ambulating with person assist				
15	9	while ambulating without assistive device				
16	16	while ambulating/standing				
17	2	while being supported by caregiver				
18						
19						
20						

This type of export is very useful if you do any kind of rate based reporting for your organization. It allows you to manage the information from a report in a spreadsheet so that you can change the way the information is formatted, add calculations or simply want the numbers, not the pictures or charts.

In this chart, you can change the titles in the first line, change the width of the second column and have a totally different way of showing the data. You can also add any spreadsheet functions to show totals or averages, etc.

This guide is intended to help you begin the creation of reports. Once you feel more comfortable and have time to create different types of reports, the possibilities are endless! For additional training or guidance, please contact FSA PEER Support Services and we will help you in any way we can.