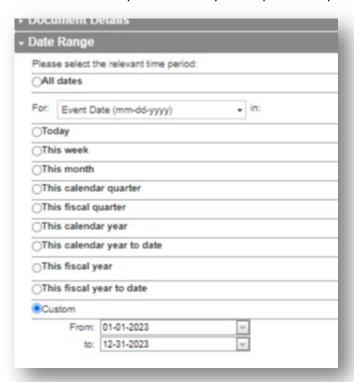# Running Survey Reports for Regulatory Agencies

There are two survey reports in the Admin Picks section for communities who need to run these reports for surveyors.

DOH Survey Report – this is intended for the Skilled Nursing level of care only
AL/PCH Survey Report – this is intended for the Assisted Living/Personal Care level of care only

To run this report for all events that occurred within your survey window, do the following:

1. Find the report in Admin Picks
2. Click to open the report – the initial report will have the date range of ALL dates
3. Click the Report Editor button (pencil icon in the upper left)
4. Open the Date Range section
5. Make sure that the radio button for the custom option is selected
6. Complete the For: field as Event Date (mm-dd-yyyy)
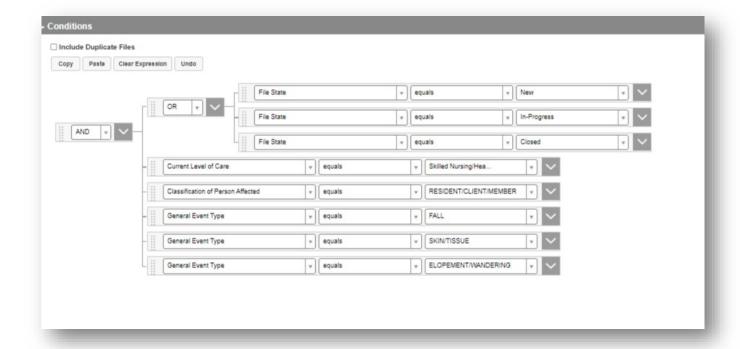7. Enter the dates from your last survey to the present day

8. Click Run Report
9. You can save this report in your folder (with your initials) if you wish but remember to change the date range for each survey visit

If you want to limit this report to certain events, follow these steps:
1. Open the Report Editor (pencil icon in the upper left)
2. Scroll down to the Conditions section
3. Click on the gray arrow on the left side of the line that reads "Classification of Person Affected equals Resident/Client/Member"
4. Select "+ New Line"
5. In the new line, enter the "General Event Type" in the first block and "equals" in the second block
6. In the third block, select the type of event you would like to see in your report
7. Repeat these steps to add additional event types

Remember that the file manager running this report will only be able to see what he/she has scope to see. If the report needs to include information beyond the person's scope, someone else with a different scope will need to run the report.