

Custom Report

Review

Date	Version	Reviewed By	Comments
03/03/2020	V0.2.0.01_draft	Michaela Regan	Create draft document

Table of Contents

- Custom Reports Introduction 3
- Creating a Custom Report 3
 - Navigation to Custom Reports 3
 - Creating the Report 3
 - Sorting the Report 5
 - Filter the Report..... 5
 - Example Report 5
 - Add/Deleting Columns 6
- Delete a Report 6
- Accessing Reports 7

Custom Reports Introduction

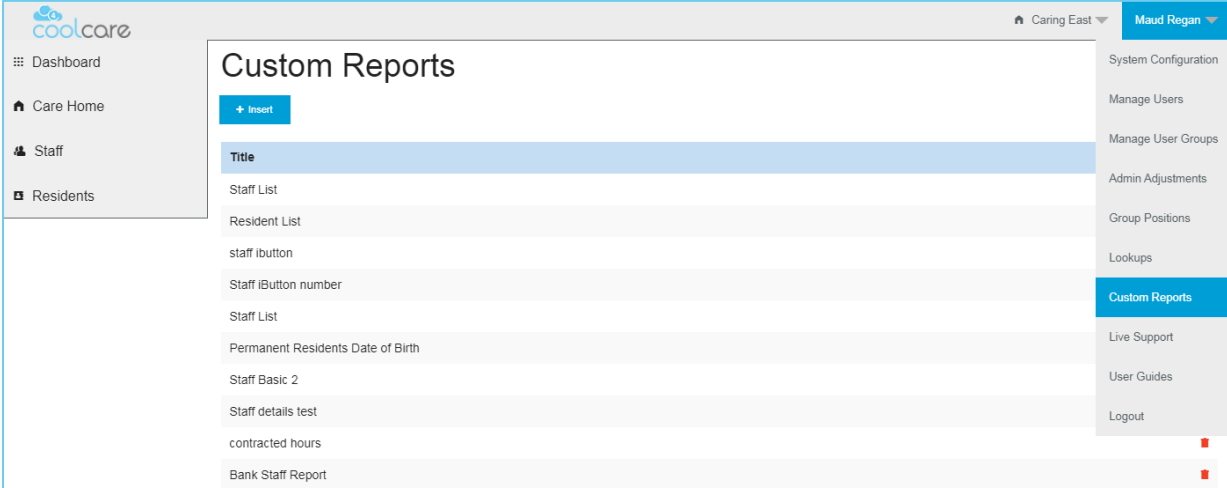
In addition to the reports that are part of CoolCare4 by default Custom Reports can be created to aid with reporting and data gathering. Reports can be created for both staff and residents. This guide can be used to help with creation and editing of these reports.

Creating a Custom Report

The Custom Reports section is located within the top-right hand menu, where your name is displayed. You will need permission to access the Custom Reports setup, permissions are managed by your CoolCare system Administrator.

Navigation to Custom Reports

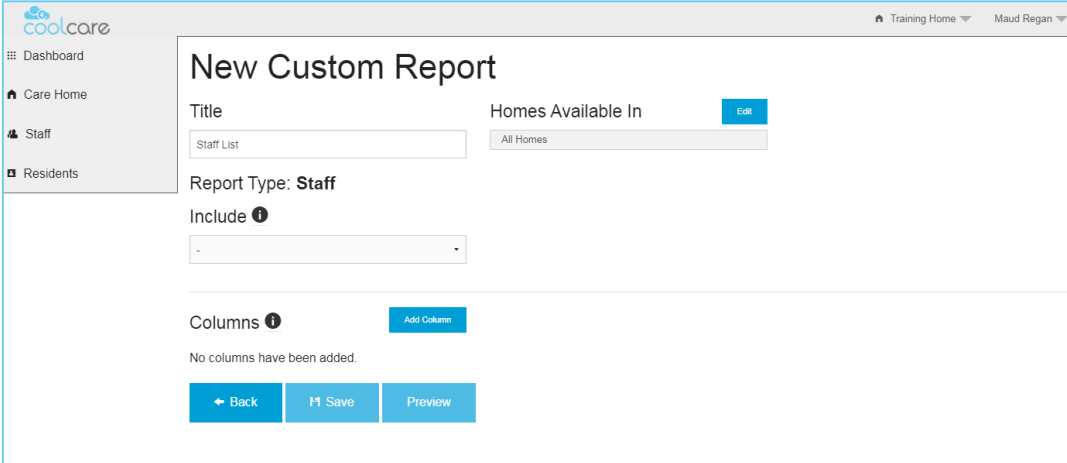
- Select your login name in the top right of CoolCare4
- Select Custom Reports



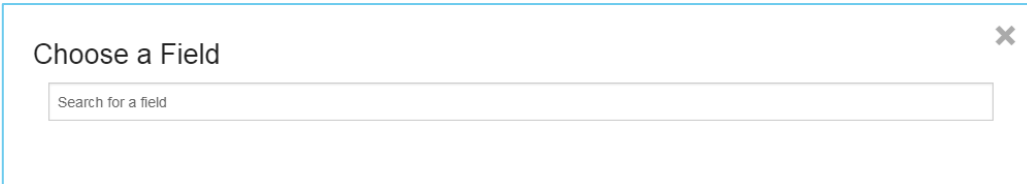
Creating the Report

To create a custom report:

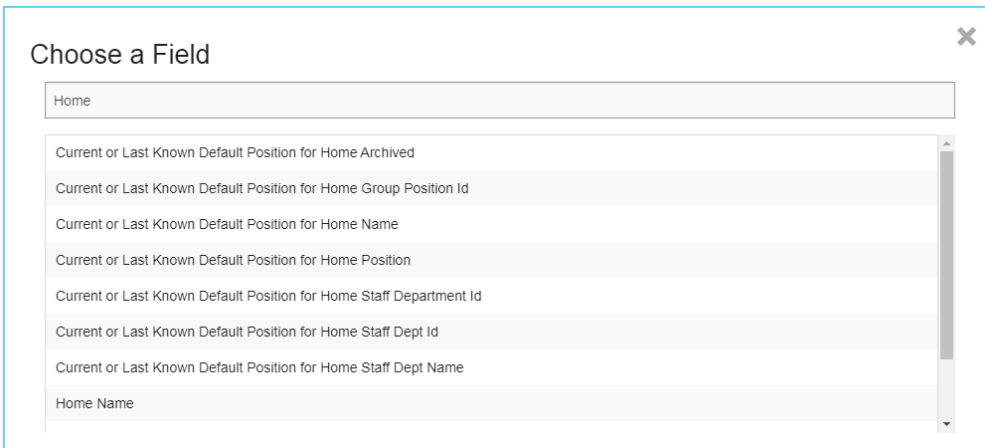
- Click Insert
- Enter the title of the report
- Select the report type either Staff or Resident, this will determine what information is available to report upon.



- Choose the Homes that you would like this report to be available in, defaults to 'All Homes'.
- Click Edit to change the Homes that you would like this report to be limited to.
- Uncheck the Homes that you do not want to have this report available for
- Click Select
- From the 'Include' column, it is possible to include further information from the Contact section of either Staff or Resident records. **Note, it may not be possible to export such reports.**
- Click the 'Add Column' button to select data that you would like to display in the report. The order they appear in the setup, will determine the order that the report is displayed.



- Type in the field 'Search for a field' to locate information, for example 'Full Name'. This will display the Full Name of the Staff Member.
- If you don't know the name of the field you're looking for, type in a keyword, for example 'Home'. All associated fields available with the word 'Home' will be shown in the display.



- Once you have located the appropriate field, click to select it. The field information will now be displayed in the columns list

Sorting the Report

Once you have added all the required columns, choose the Sort option for your report.

- From the drop-down list, choose the field on which you require to sort the data. This is a list of the columns you have added to the report.
- Choose asc (ascending) or desc (descending) order

Filter the Report

The Filter option allows you to filter out information from the report based on pre-set criteria such as filtering by departments for staff members or recent discharges on residents.

Consider the use of a filter to help tailor the information results.

Example Report

Report for Nurses PIN expiry

- From Custom Reports Insert a new report called 'Nurse PIN Expiry All Homes'
- Choose type 'Staff'
- Select 'Homes available In' – choose All Homes
- Click on 'Add Column'
- Add columns for Full Name, Home Name, Current Effective Default Position, Registered Professional PIN expiry
- Sort by 'Current Effective Default Position'
- Select filter of 'PIN due soon'

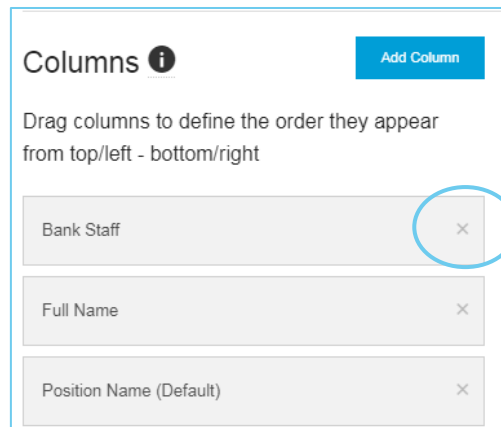
You will now have a report that will identify Nurses (with PIN registration) who's PIN number is set to expire within 14 days.

Handy Hint: You can use the Preview Button to create a real time preview of what the report will produce

Add/Deleting Columns

Once you have saved the report, you may wish to change the detail of the report.

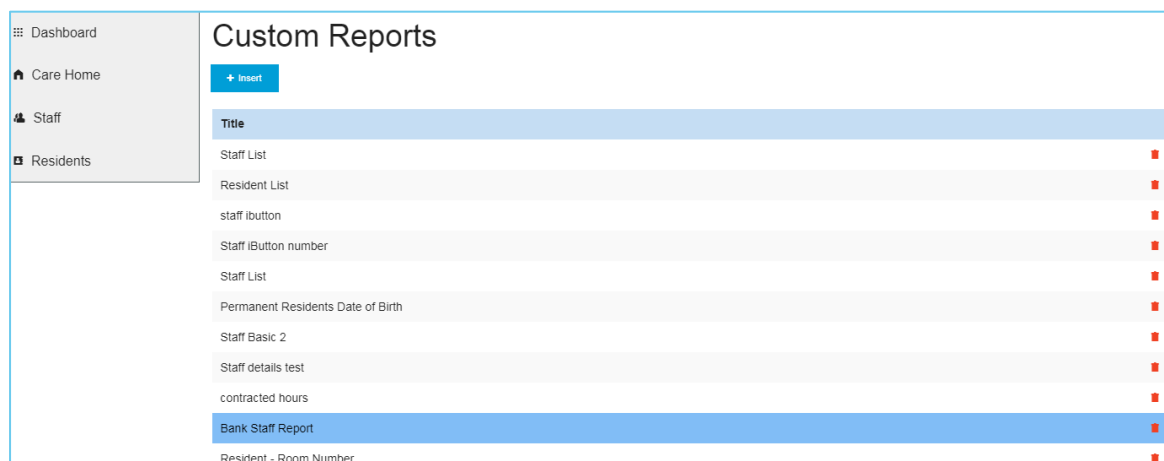
- From Custom Reports, locate your report in the list.
- Click to select and open the report
- Click 'Add Column' (as described above) to insert a new column
- Click the X button to remove a column from the report.
- Click 'Save' to apply and save your changes



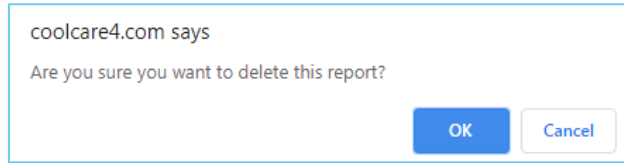
Delete a Report

It is good house-keeping to remove unwanted reports from the system, it removes confusion if the report has been superseded by another report and reduces the number of reports in the list making it easier to navigate.

To delete a report from Custom Reports, click the  red dustbin icon from the display



- Click OK to delete or Cancel if you do not wish to delete it



Accessing Reports

Now you have created and finalised your report, it will be available to view for other users to run.

Reminder, the Homes that have access to the report is determined by the setup.

Dependent on whether your report is based on Staff information or Resident information, it will appear in the respective report section of CoolCare.

- From the left-hand menu, choose Staff
- Click Reports
- Custom Reports created for this Home based on Staff Information will be displayed here
- Here you can choose to run the report and have the information displayed in PDF format or Export to Excel where you can model the data if required.

<ul style="list-style-type: none"> ▲ Care Home ▲ Staff Staff Records Rota Timesheet Calendar Payroll Reports ▣ Residents 	Staff Details													
	Full Staff Details	Staff Contact Details	Staff Missing Information											
	Absence and Holiday Reports													
	Staff Absence	Holiday Details												
	Training Reports													
	Training Matrix	Training Exception Report	Achieved Training											
	Staff Hours and Timesheet Reports													
	Bank Staff Hours	In Home Between Dates	Budget Vs Planned											
	Budget Vs Timesheet	Planned Vs Timesheet	Timesheet Totals											
	Vacancy Tracker	Staff Pool Hours												
Custom Reports														
<table border="1"> <tr> <th colspan="2">Bank Staff Report</th> </tr> <tr> <td>PDF</td> <td>XLS</td> </tr> </table>	Bank Staff Report		PDF	XLS	<table border="1"> <tr> <th colspan="2">Bank Staff test</th> </tr> <tr> <td>PDF</td> <td>XLS</td> </tr> </table>	Bank Staff test		PDF	XLS	<table border="1"> <tr> <th colspan="2">Birthdays</th> </tr> <tr> <td>PDF</td> <td>XLS</td> </tr> </table>	Birthdays		PDF	XLS
Bank Staff Report														
PDF	XLS													
Bank Staff test														
PDF	XLS													
Birthdays														
PDF	XLS													
<table border="1"> <tr> <th colspan="2">contracted hours</th> </tr> <tr> <td>PDF</td> <td>XLS</td> </tr> </table>	contracted hours		PDF	XLS	<table border="1"> <tr> <th colspan="2">Contracted Hours</th> </tr> <tr> <td>PDF</td> <td>XLS</td> </tr> </table>	Contracted Hours		PDF	XLS	<table border="1"> <tr> <th colspan="2">Contracted Hours - Leavers</th> </tr> <tr> <td>PDF</td> <td>XLS</td> </tr> </table>	Contracted Hours - Leavers		PDF	XLS
contracted hours														
PDF	XLS													
Contracted Hours														
PDF	XLS													
Contracted Hours - Leavers														
PDF	XLS													

- From the left-hand menu, choose Residents
- Click Reports
- Custom Reports created for this Home based on Resident Information will be displayed here
- Here you can choose to run the report and have the information displayed in PDF format or Export to Excel where you can model the data if required.

- Dashboard
- Care Home
- Staff
- Residents
- Resident Records
- Accounts
- Invoicing
- Invoices
- Reports

Residents Reports Show Descriptions

Resident Details

Full Resident Details

Resident Contacts

Resident Ledger

Resident Missing Information

Fire List

Fee and Contract Reports

Fee Discrepancies

Missing Contracts

Residents by Funding

Invoice Analysis

Absence and Discharge Reports

In Home Between Dates

Resident Absences

Resident Discharges

Custom Reports

nok	Permanent Residents Date of Birth		Resident - By Room/Fee		
PDF	PDF	XLS	PDF	XLS	
Resident - Room Number		Resident List		Resident Room List Test	
PDF	XLS	PDF	PDF	XLS	