

HOW TO PULL AN OACCESS SERVICE REPORT WITH CLIENT NAMES & UNITS RECEIVED

The screenshot shows the Oregon Access software interface. On the left, a vertical menu contains buttons for 'Person Search', 'Case Search', 'Call Search', 'Resource Dir', 'Reports', 'Ticklers', 'Print Forms', and 'Narrative'. The 'Reports' button is highlighted with a red box and labeled '1. Select'. A red arrow points from this box to a secondary window titled 'Print Reports'. This window contains a list of report descriptions, with 'OAA - Service & Billing Report' highlighted by a red box and labeled '2. Select'. Below the list are buttons for 'Close', 'Help', 'Preview', and 'Print'.

Report Description
CA - Emergency Concerns Report
CAPS 2 Assessment Review Report
CAPS 2 Emergency Concerns Report
LDS / Pay-In Report
Relocation Report
Call Count Report
Call Outcome Report
Follow-Up Call Report
Referral Analysis Report
OAA - Client List
OAA - Client Mailing List
OAA - Monthly Transaction Record
OAA - Service & Billing Report
EPD Branch Report

Print Reports

Select the Report you want to Preview/ Print

- Report Description
- Relocation Report
- Call Count Report

Enter parameters for OAA - Service_Billing Report

Service Date Range: 07/01/2013 To 05/25/2014

Report Type: Service & Billing Report Billing Summary

6. Select specific service or leave blank if you wish to see all services & recipients. Check specific qualifier or All Qualifiers.

3. Type Date Range

4. Select Service & Billing Summary

5. District defaults, but if this fails select it

District: Linn, Benton, Lincoln

Site:

Service: Homemaker (CEP) {#2a}

Qualifier: All Qualifiers

Provider:

8. Select Preview. Note: The system may take many minutes to collect the data for view. Don't give up – it requires patience.

7. Use to select to save as PDF instead of print hard copy.

Close Help Preview Print Printer Setup Clear