Chapter 7:   Reports
Section 1:   Reports
Lesson: Using Reports

Objectives:

Upon completion of this lesson the user will be able to:
- know how to access, run, print and export reports.

Overview:

Most of the reports you need to run your clinic efficiently are available on-line within TWIST. With a few clicks of your mouse you will be able to access the information you need quickly and easily.

There are reports for every functional area in TWIST. These include quality assurance reports that can be used to monitor your compliance with state and federal regulations, reports to use for managing your appointment scheduling, reports that generate information for clients, and staff productivity reports just to name a few. Although this lesson does not cover all reports, it will teach you how to access the reports you need.

Some reports are designed specifically for local agency use while others are designed for state use only. There are quality assurance reports for most areas among the reports the state will use. These will be used to help track local agencies compliance with state and federal regulations and will be utilized when doing local agency reviews.
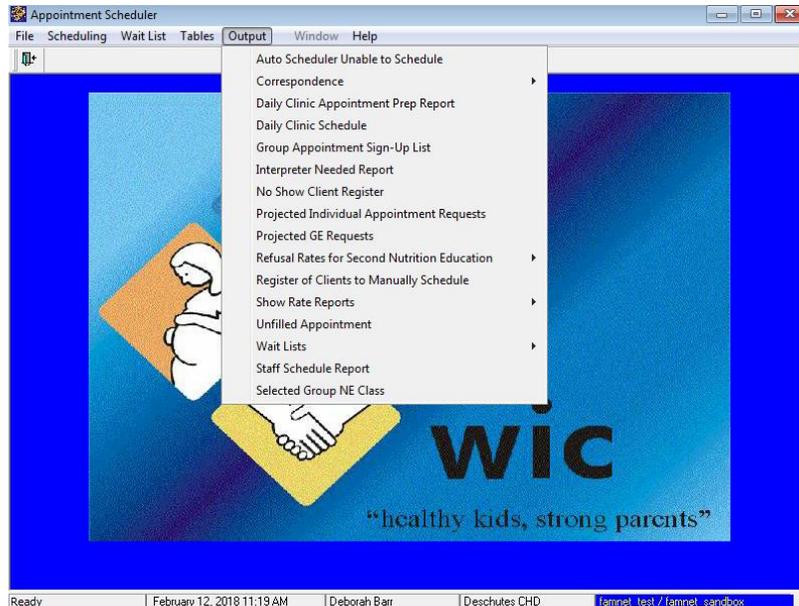
Instruction:

Running Reports

Reports are separated into each functional area of TWIST. In each module they are found under the "Outputs" menu.

For this lesson, we are using the "Daily Clinic Schedule Report" which is in the Appointment Scheduler module.
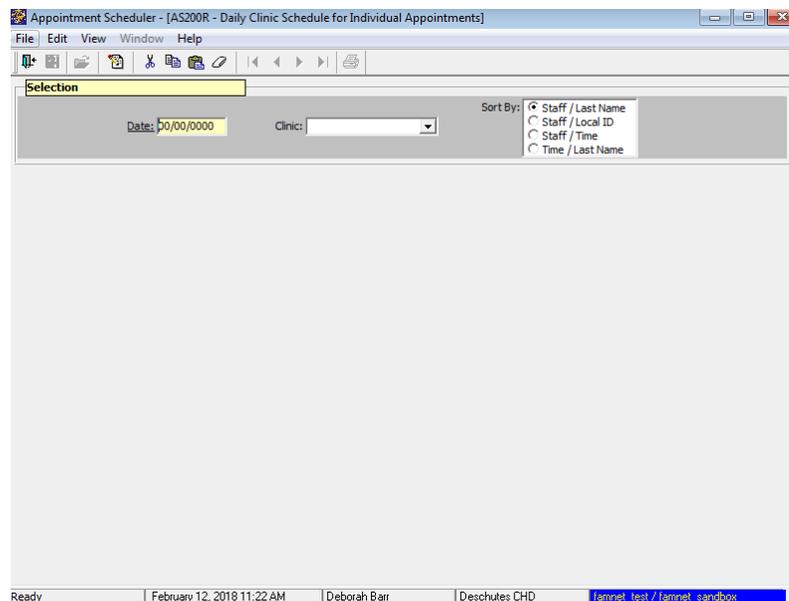
The starting point for this lesson is:
> Select Modules ⇨ Appointment Scheduler ⇨Output

Figure 1: Sample of Reports in Appointment Scheduler

1.   **Select the report to run. For this lesson, use "Daily Clinic Schedule."**

This will bring up a blank screen with selection criteria for the report you want to run.
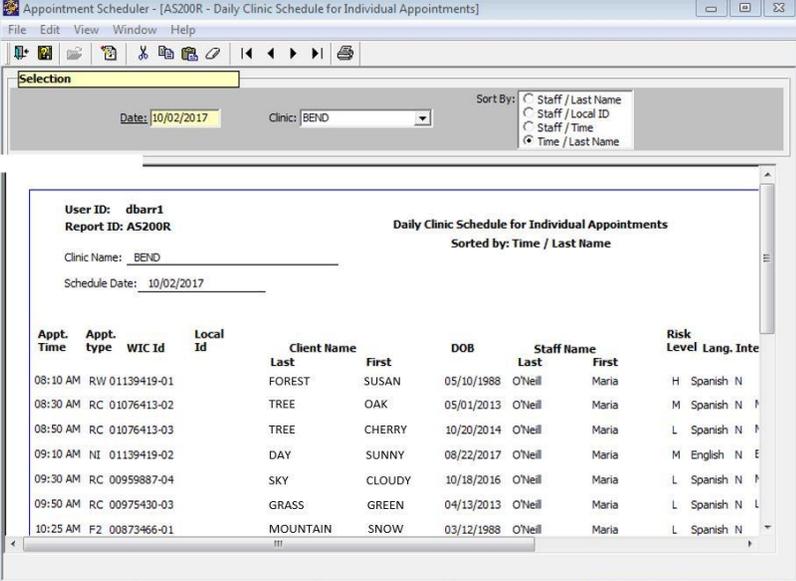

Figure 2: "Daily Clinic Schedule" Report Selection Criteria

2.   **Enter selection criteria.**

- Selection criteria are used to limit or expand the search for the information you are looking for.
- If a certain criterion is mandatory the field will be yellow.

3.   **Click the "Run" icon [icon] on the top toolbar.**

- If there is data present that meets your selection parameters, the report will display. If there is no data present that meets your selection parameters, a message stating "*no data found*" will display.
- The data can be reviewed (if more than one page in length) in a variety of ways. You have the option of scrolling through the data using the View menu bar, the Toolbar arrows or the side/bottom scroll bars.

Figure 3: "Daily Clinic Schedule" Report

4.   **Once the report has run, click the "Print" [icon] icon for a paper copy of the report.**

- The report will appear in a print preview mode. Be sure the blue margin includes all the data you would like printed. If the data is located outside this blue box, you will need to use legal-size paper when printing.

5. **Once the report has run, click the "Save As" icon to export the data in the report to an Excel file.**

- Only some reports can be exported to Excel. If the report can be saved directly into Excel, the "Save As" icon will automatically appear toward the left-side of the Toolbar.
- The report can be saved on your local computer. This is useful to filter and analyze the data.
- It is helpful to save the report with a unique file name.

♫ **NOTE**: The first time you use the "Save As" icon, check the location of where the file is saved. To save to your local computer drive, following these instructions.

In the "Save As" pop-up window:
Network ⇨ Desktop ⇨ Computer ⇨ (find your files)

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