Chapter 7: Reports
Section 1: Reports
Lesson: Special User – Standard and QA Reports

Objectives:

Upon completion of this lesson the user will be able to:

- know how to access and run reports; and
- understand the difference between quality assurance and standard reports.

Overview:

Having access to information you need to manage your clinic is easier than ever with TWIST. No more waiting for reports on caseload, show rates, etc. to come in the mail. Now all the reports you need to run your clinic efficiently are available on-line with TWIST. There is no need to have a special training for generating these reports either, because 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 will not cover all reports it will teach you how to access the reports you need. You will receive a “Reports Notebook” that covers all local agency reports and includes information about the purpose of each report.

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

The starting point for this lesson is:

Select Modules ⇨ Reports

Figure 1: "Reports" Screen

1. **Click the area for which you wish to run a report and select report.**

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

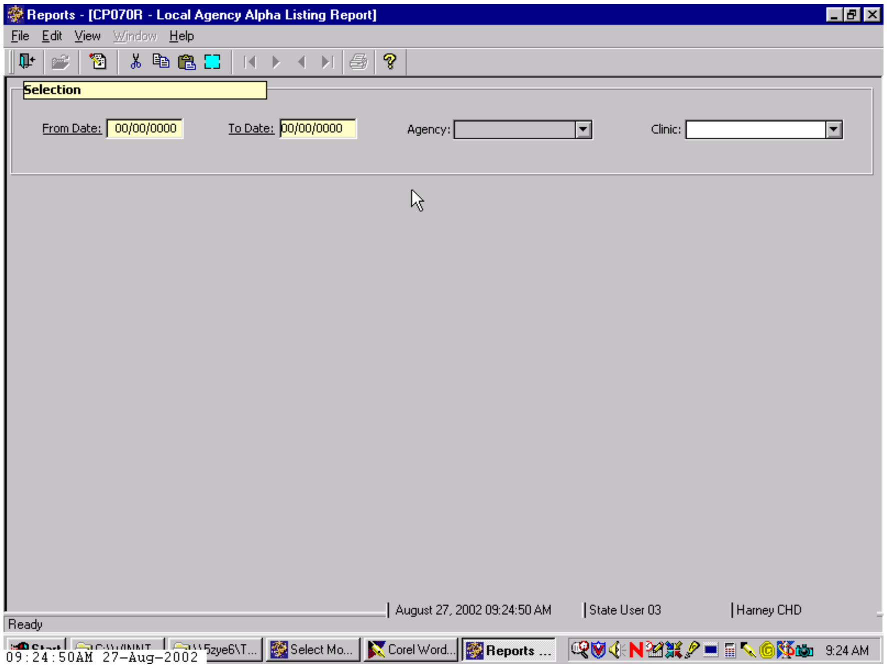

Figure 2: "Selection Criteria" Screen

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 (the pencil and paper) 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.

4. **Click the Print 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.

♫ NOTE: Some reports can be exported into an Excel spreadsheet. If the report can be saved directly into Excel, an icon will automatically appear toward the left-side of the Toolbar. Click on this icon and select where you would like the file to be saved.

♫ NOTE: All reports can also be accessed from each functional area by clicking on "**Outputs**" and selecting the desired report.

➥ *Practice Activities:*

Run the local agency alpha list for this month.

1. Double click the "Reports" icon on "Select Modules" screen.
2. Select "Client Processes".
3. Select "Reports".
4. Select "Intake".
5. Select "Local Agency Alpha Listing".
6. Enter a "From" date of the first of this month and a "To" date of the last day of this month.
7. Click the "Run" icon.
8. Do not print report.

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