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Administrative Reports give you the ability to view a variety of data from different areas of your Agency's operations in a concise format. From financial information, such as charges and payments, to more clinical data like Notes and Forms requiring signatures, you'll be able to keep a close watch on whatever type of information you're looking to retrieve.

Accessing Administrative Reports

Accessing Administrative Reports

1. Navigate to **Administrative Reports** from the Main Menu.

Note: Other reports and dashboards options will provide more focused reports and dashboards, respectively.

2. Click the report you wish to view and provide any additional parameters (date, etc.).
3. Depending on the report you run, you may be able to click **Return to Reports** to run another report, or you may need to return to the **Main Menu** and navigate back again.

Note: To avoid having to return to the Main Menu, you can add **Administrative Reports** (or any other option) to your left-hand menu ribbon by pressing **CTRL** and clicking Administrative Reports.



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Where Does The Information Come From?

Before you can run a report or access and utilize a dashboard, there's a couple of things you need to know. Is the report a **Data Report** or **Interactive Dashboard**? Where does the data flow from? What are the parameters, as applicable, of the report/dashboard? Where in NextStep can I find the report?

The following chart provides an overview of 5 of the most commonly used reports/dashboards in NSS:

Common Reports/Dashboards

Name	How does data flow into the Report?	What are the Parameters?	Type of report?	Where does the data pull from?	Where can I find it?
Notes Not Finalized	This report pulls in clients that either have a status of Active or Discharged. This report will only show the clients a Clinician has access/permission to view. Data flows into this report when Clinicians only have saved a Note as a draft and have NOT finalized the Note. There is no restriction on the type of Note that can flow into this report, all note types are allowed.	Start Date, End Date - The Date Of Service is used to filter Notes that have NOT been finalized	Interactive Working Dashboard	Clinical, Notes	Administrative Reports
Scheduler Edits	Must have the Scheduler and data flows into this report once Clinicians make appointments for Clients. This report does not pull in deleted appointments.	Start Date, End Date - Date being compared is the Apt Start Date	Interactive Working Dashboard	Scheduler, Appointments	Administrative Reports
Programs By Form and Location	This report pulls in all of the programs that are tied to each Form in the system. The only restriction on this report is that the Form must be in use (not deleted). All Form types are pulled into this report.	N/A	Interactive Working Dashboard	Clinical, Form Builder	Administrative Reports
Login Form Note	This report pulls in basic user statistics. Any user can be pulled into this report including deleted users. Data flows into this report once a user is created, it does not require the user login/complete any work.	N/A	Data Report	Clinical, Maintain Users->User Maintenance, Forms, Notes	Administrative Reports
Case Load(admin)	This report pulls in all of the Clinicians clients that are active. This report pulls in the Dictionary Singular term for primary clinician, secondary clinician, intake specialist, and medical director (all of these are aliases and can be found in the Dictionary of Terms). Data flows into this report once a Clinician is assigned a role to an active client (which happens within the Face Sheet in the Case Assignment Section).	N/A	Data Report	Clinical, Face Sheet, Dictionary of Terms	Administrative Reports

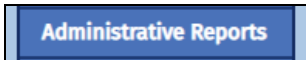
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Navigating and Changing Views in Reports and Interactive Dashboards

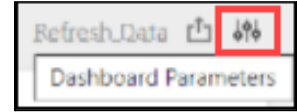
Reports are presented in a number of different view types in NextStep, and depending on the report you may want to change a detail or two. Fortunately, report output can be altered quickly and easily.

Navigating and Changing Interactive Dashboard Views

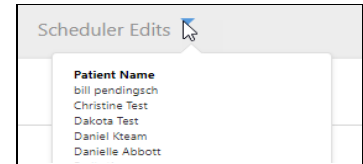
1. Navigate to **Administrative Reports** from the Main Menu.
2. Select an **Interactive Dashboard**, such as *Notes Not Finalized*.



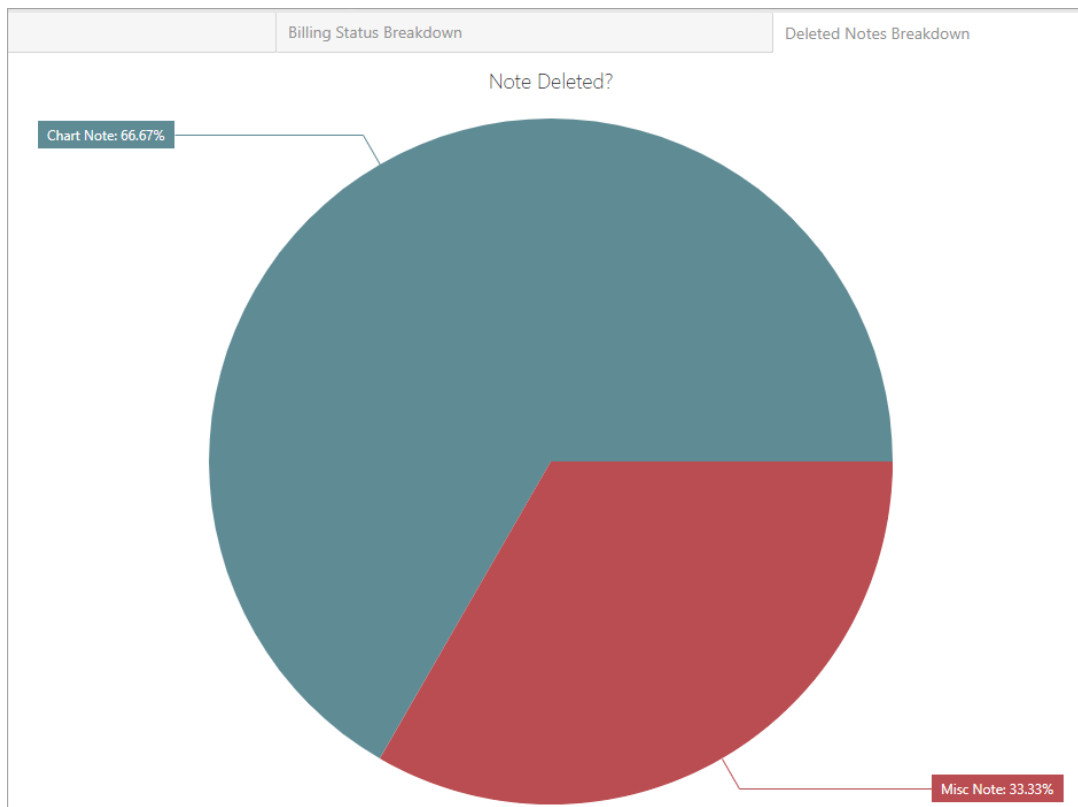
3. Click the **Dashboard Parameters** icon in the upper-right hand corner of the screen.
4. Set the desired date and/or data range, as appropriate and click **Submit**. Click **Reset** to begin the selection process again.
5. The **Search** criteria will enter with **(All)** selected. Alter the search criteria (Client, Location, etc.) to fit your needs.
6. By hovering over the filter icon next to the dashboard title, you'll be able view your search criteria in its entirety.



Patient Search <input type="text" value="Enter text to search..."/> <input checked="" type="checkbox"/> (All) <input checked="" type="checkbox"/> bill pendingsch	User Search <input type="text" value="Enter text to search..."/> <input checked="" type="checkbox"/> (All) <input checked="" type="checkbox"/> ADMIN
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7. Some dashboards, like *Notes Not Finalized* also contain pie graphs that allow you to drill down your data further. Select one of the following tabs and click a section of the pie chart to drill down your data to view details:
 - **Note Type Breakdown:** This tab displays a pie graph of each Note type that can be drilled down from Note Type > Location > User Name > Client Name.
 - **Billing Status Breakdown:** This tab displays the billing status of Notes that are not finalized and can be drilled down from Billing Status (No Billing Record, Not Sent, Sent > Location > User Name > Client Name.
 - **Deleted Notes Breakdown:** This tab displays if a Note has been deleted and can be drilled down from Note Type > Location > Note Deleted (Yes, No) > User Name, and Client Name.



Note: To drill up through the pie chart, click the back button.

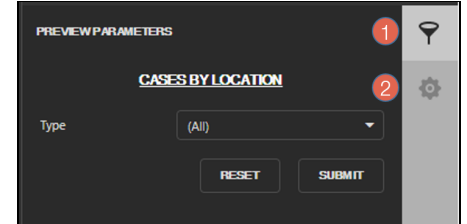
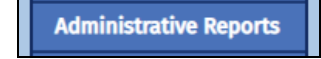
Deleted Notes Breakdown - Chart Note



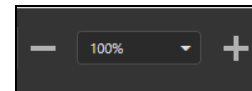
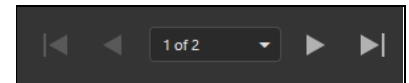
Navigating and Changing Report Views

1. Navigate to **Administrative Reports** from the Main Menu.
2. Select a **Report**, such as *Cases by Location* or *Client Referrals*.
3. On the right side, you will see two icons: One for **(1) Parameter Settings**, and the other for **(2) Output Settings**. Adjust these, as needed.

Note: Parameter Settings will, by default, be set to (All), and Output Settings are editable by output format.



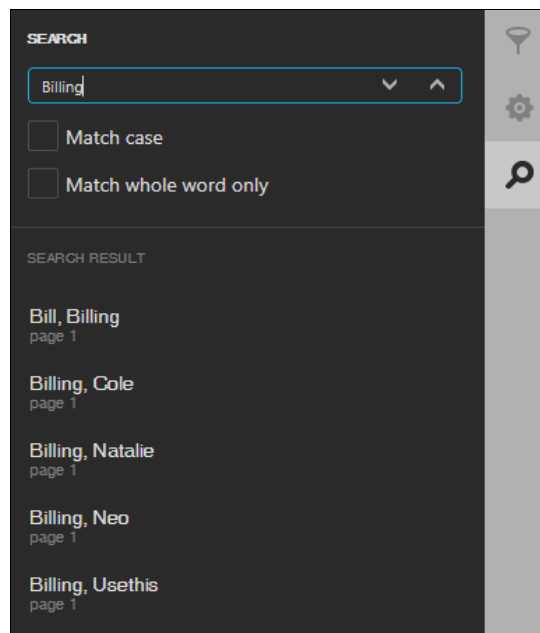
4. Click **Submit** to run the report.
5. Your report will generate. To scroll through the pages, click the page navigation arrow icons next to the “x of y” indicator.
6. If you wish to fit more data on the screen, use the zoom icons.
7. To output your report to either a hard copy or digital format, use the



print/export icons



8. If you wish to search your report for a term, case number, or date, you can use the **Search** function via the magnifying glass icon:



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Stock Report Overview (Administrative Reports)

NextStep's report function is preloaded with a robust stock set of reports. If you're wondering which report to run and what information it presents, refer to the following chart:

Stock Administrative Reports in NextStep

Report/Dashboard Name	Report/Dashboard Description
Case Load (Admin)	Gives a breakdown of case assignments by user. Clicking on a user provides case assignment details.
Cases By Location	Lists all locations, and the clients within them.
Client Referrals	Returns a list of all active cases that have a referral source and an admission date between those specified. You can mouse-over the referral source for more information.
Duplicate Patients	Displays duplicate patients currently in your Agency's instance of NextStep.
Form Statistics	Provides a breakdown of a Form, showing the frequency of the values selected.
Forms Signed but not Sealed	Lists all non-sealed Forms that have a staff signature.
Longitudinal Chart Review	Search Notes based on broad criteria. Pull all Notes written by a selected clinician, or all Notes written for a selected client regardless of author, and more.
Referral Sources	A detailed list of referral sources with the ability to list the Clients referred by each.
Insurance Authorizations Management	A bird's-eye view of all client authorizations. Sort by authorizations expiring soon, client authorizations running low, and more.
Billing Conflicts	Lists overlapping service records (same client, same procedure code, same date of service, and overlapping start/stop times).
Billing Services	View the services users have entered into the billing box during the selected date range.
Billing Services Dynamic	Returns data entered into all billing box fields, including dynamic/configurable fields that are agency-specific.
Forms Without Billing Records	Returns a list of billing-friendly Forms that do not have billing records attached to them.
Units of Service Per Activity by Client	Provides a listing of services, by activity, for an individual client.
Units of Service Per Activity Code Per User	Displays units of Service by Activity Code for the user currently logged in.
Access Log	Tracks which clients a user has selected.
Active Users	Shows all users that are currently logged into the system.
Correction Change Log	A tool for reporting on all uses of the "Correct" button.
Invalid Login Attempts	Lists all invalid login attempts to the system between the timeframe specified. Includes the attempted name, remote IP Address, time of event, and location within the system.
Notes Not Finalized	Notes left in a Draft status that need to be finalized, or deleted.
Intervention Overview	Provides Agency-level overview of interventions, frequency, and treatment goals.
Scheduler User Permissions	Assigns scheduler permissions based on either username or profile type
Programs by Form and Location	See which programs and locations a given form is attached to.
Hours Of Service	Provides a breakdown of hours of Service by client that can be filtered by start and end date and by Building. Required: Residential; Billing VFO/VPO.

Report/Dashboard Name	Report/Dashboard Description
Key Indicators Dashboard	Provides key indicator data, based on diagnostic value set and client score.
Login Form Note	See when the last time a user logged into NextStep, when they last signed/sealed a form, and when they last finalized a note.
Notes Without A Second Signature	Shows Notes that do not have a unique second signature. Once a Note has two unique signatures, it will no longer be included on the list. Useful for supervisors who need to sign off on another user's notes.
Scheduler Edits	View which changes were made to scheduler appointments, and which user made those changes.

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