Quick Reference Card – Personalized Reporting

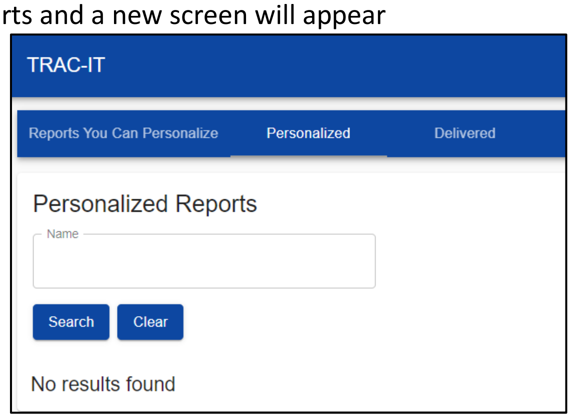
***Note: Any report created includes confidential information. Be sure to use the appropriate procedures when creating, saving, and handling reports created by* TRAC-IT.**

The following sections will describe in detail the personalized reports that you are able to run in **TRAC-IT.** Access to reports is based on the role you are assigned and your permissions. To access the personalized reporting features:

1. Click on **Reporting** in the navigation bar: 

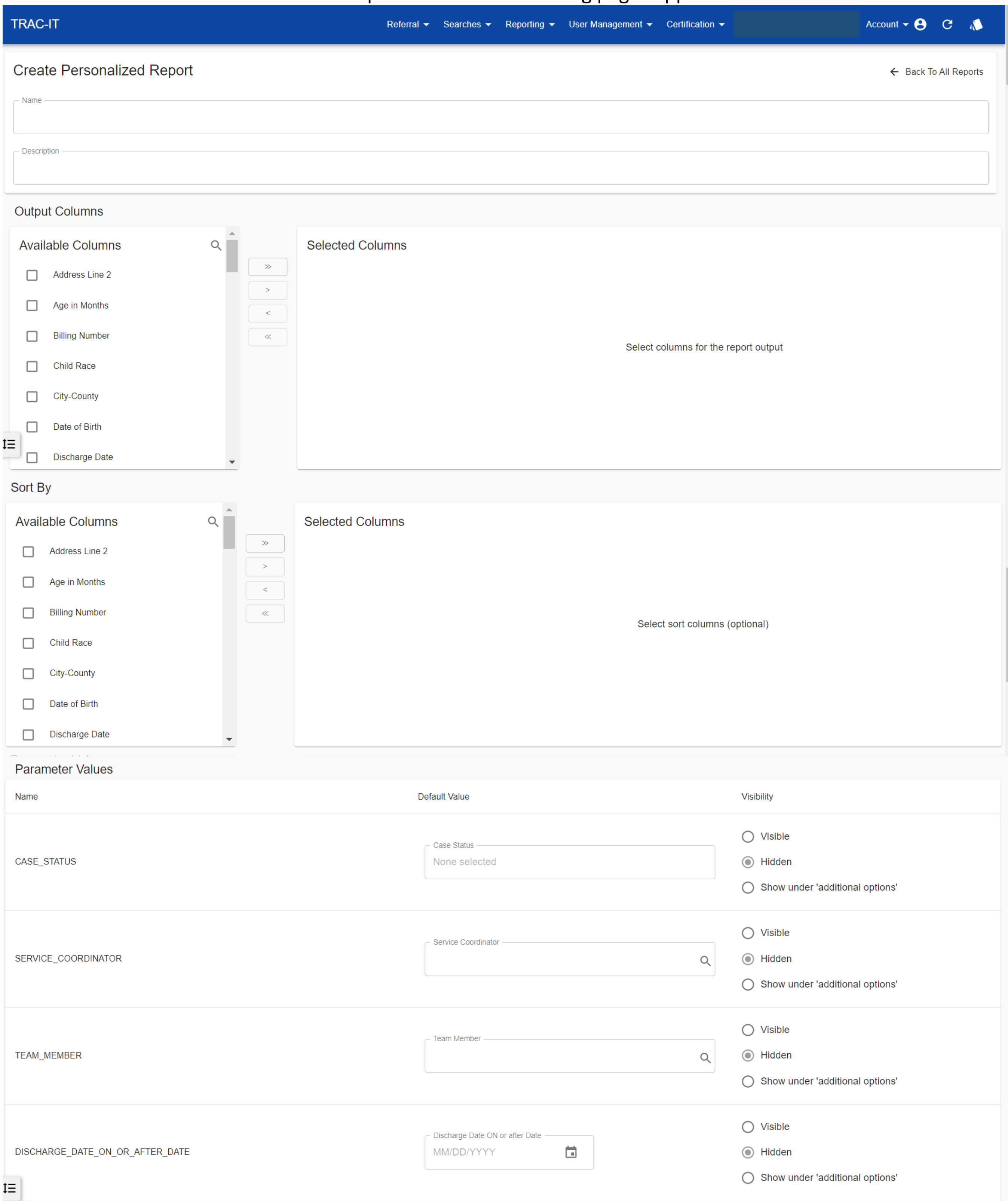
A drop-down menu will appear with the reporting options available for your role. Not all of the reporting options pictured below may be listed in your drop-down menu.

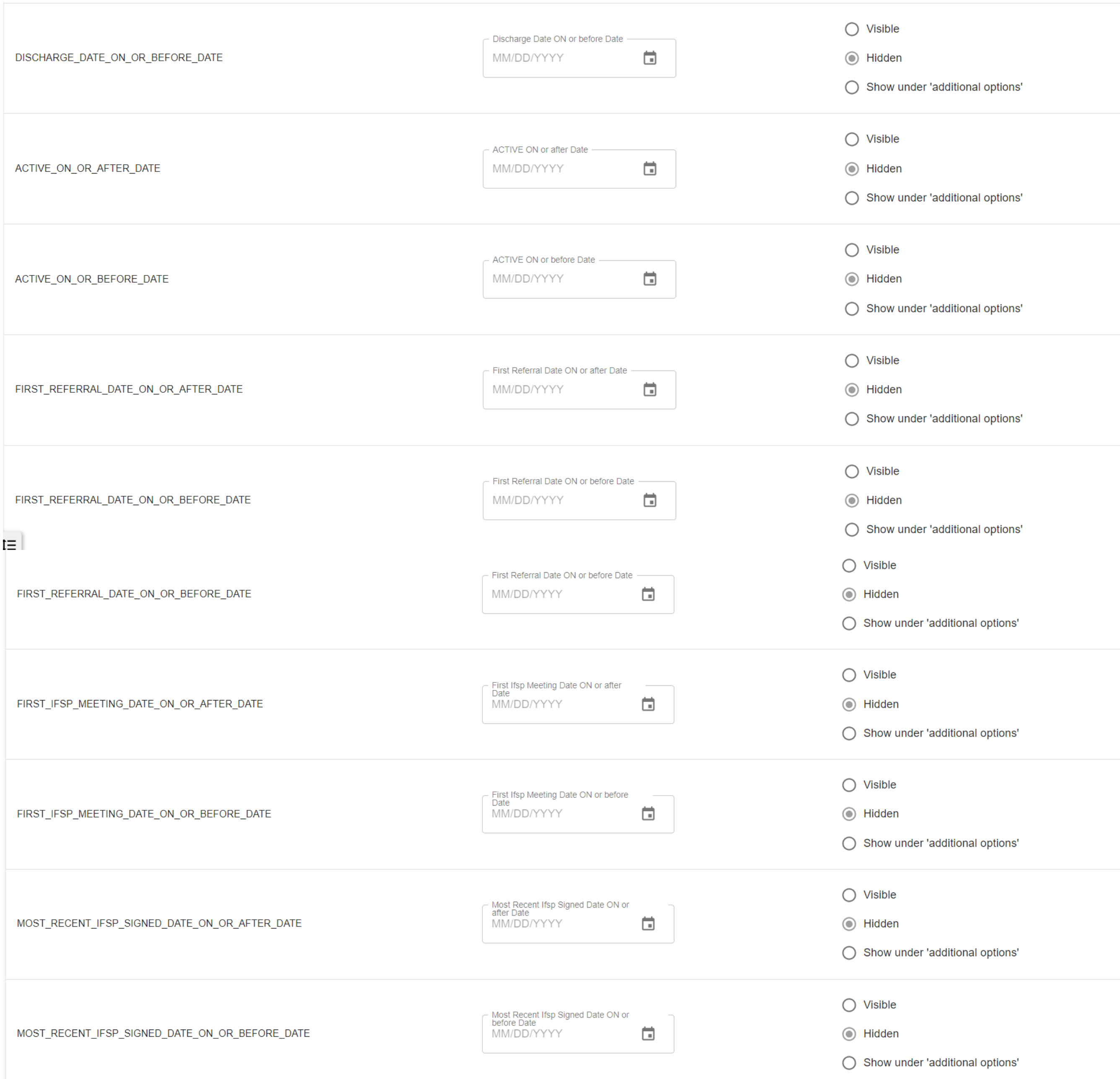
2. Click on personalized reports and a new screen will appear



3. Click on **Reports You Can Personalize** – a list of reports appears that are able to be personalized to meet your needs.

4. Click **Personalize** and the screen pictured on the following pages appears:





The following sections review each area of the report creation screen.

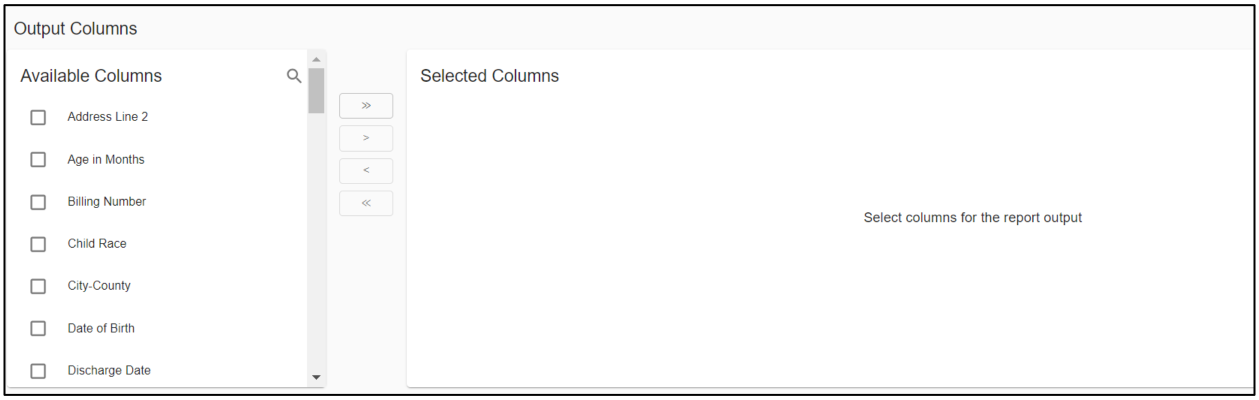
Note: *Once you run the requested report, a link to the report will be emailed to the email address you are using for your* ***TRAC-IT*** *account as well as appear in the* ***Delivered*** *option in the drop-down menu. Please be sure to* ***SAVE*** *the reports created by the* ***TRAC-IT*** *on your local computer. You may need to use the* ***Save As*** *option to ensure you have the report on your computer.*

You should rename the report when saving it to your computer since the **TRAC-IT** *creates a generic name for the file, i.e.* ClientExtract.csv. *A suggestion would be to add the date of the report, i.e.* ClientExtract0405.csv. *This would indicate the report was created on April 5th.*

Create Personalized Report:

In this section of the report creation screen you can name your report and enter a description. The personalized report you are creating will remain available to run in the future in the personalized reporting main menu. Be sure to name and describe your report in clear terms that make it easy to identify the report (i.e., a name of a report could be *Children Discharged between XX/XX/XXXX and XX/XX/XXXX*)

Output Columns:

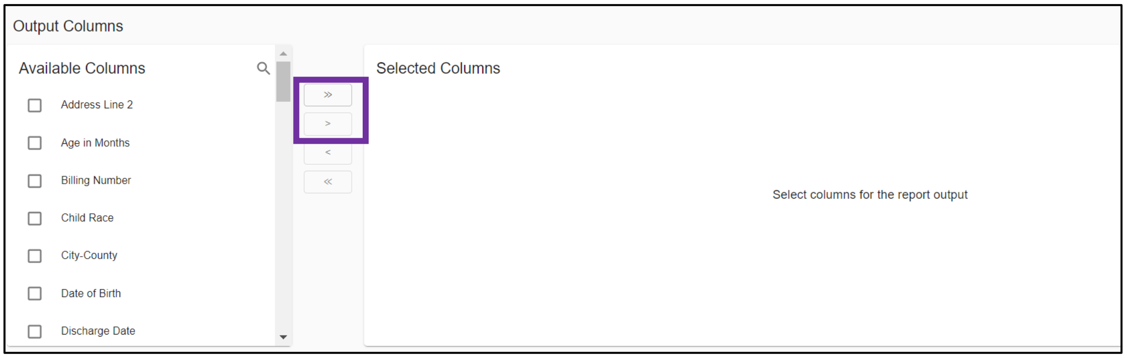


In this section, you select the columns you would like to populate in your personalized report. These values will run across the top of the excel spreadsheet and can include any of the following:

- Address Line 2
- Age in Months
- Billing Number
- Child Race
- City
- City-County
- Client Entity Last Modified
- Date of Birth
- Discharge Date
- Discharge Reason
- Eligibility Determination End Date
- Enrollment Referral Date
- First Name
- First Referral Date
- Forty Five Deadline Date
- IFSP Compliant
- IFSP Initial Meeting Date
- IFSP Timely
- Intake Visit Date
- Last Name
- Local School Division Eligible
- Local School Division Timely
- Local System
- Most Recent Eligibility Determination Date
- Most Recent IFSP Signed Date
- Next Annual IFSP Date
- Next IFSP Review Date
- Number of days since last IFSP
- Number of days until child ages out
- Number of services on IFSP
- Parent 1 Email
- Parent 1 First Name
- Parent 1 Last name
- Parent 2 Email
- Parent 2 Last Name
- Parent 2 First Name
- Primary Setting
- Service Coordinator
- Sex
- Spoken Language Other
- Spoken Language
- State
- Status
- Street Address
- TPC Compliant
- TPC Timely
- TRAC-IT ID
- Transition Plan Compliant
- Transition Plan Date
- Transition Timely
- Written Language Other
- Written Language
- Zip Code

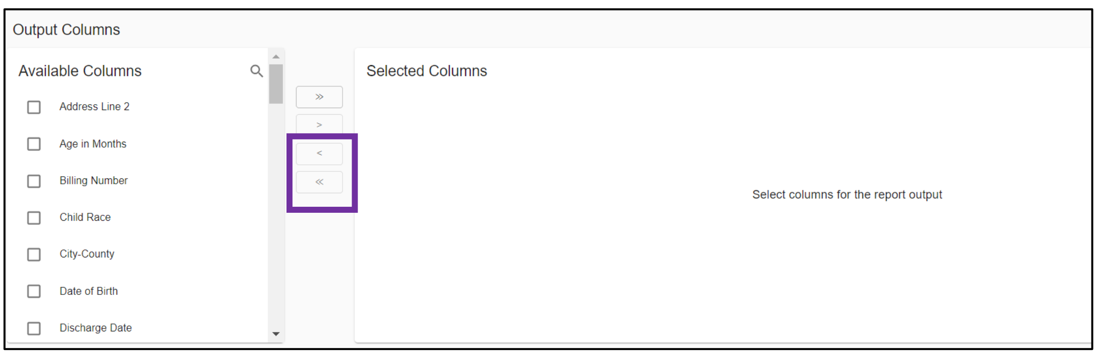
To select an output category, follow these steps:

1. Click on the box of the output you would like. You can click on more than one
2. Click on the arrow pointing to the right



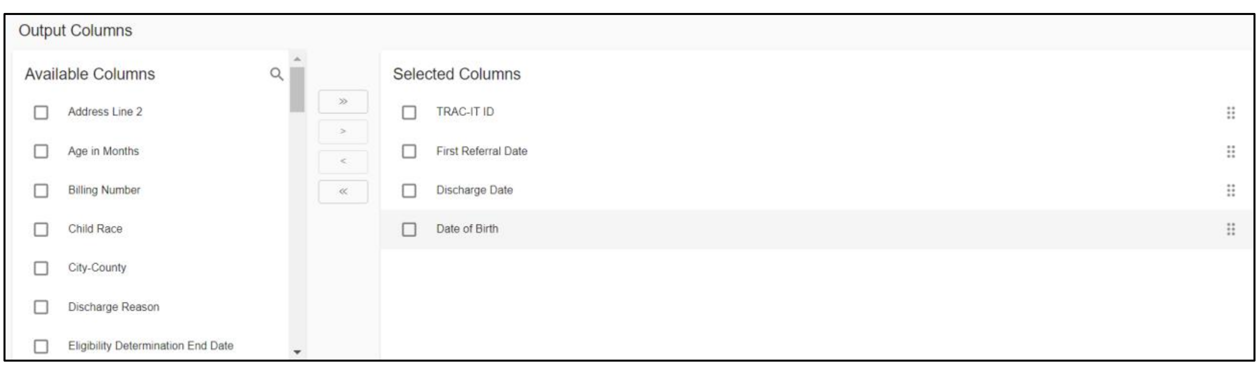
Clicking on the double arrow will add ALL the values to the Selected Columns tile. Clicking on the single arrow will add only the values you selected to the Selected Columns tile.

3. To remove an output, click on the arrows pointing to the left



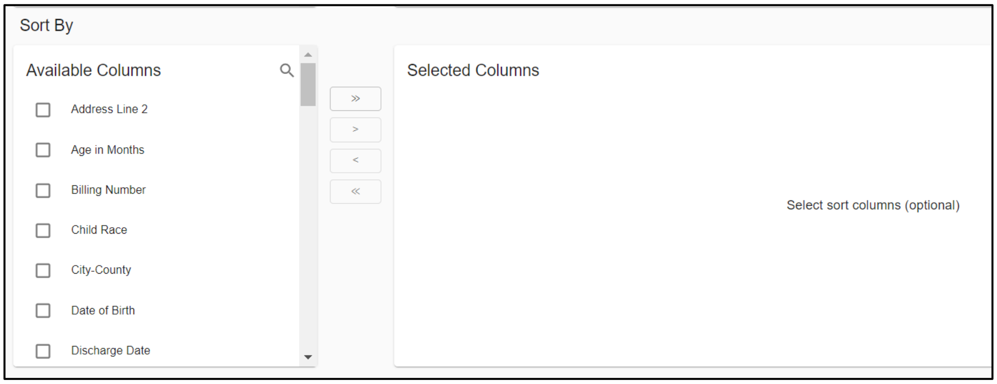
Clicking on the double arrow will remove ALL the values to the Selected Columns tile. Clicking on the single arrow will remove only the values you selected to the Selected Columns tile.

Below is an example of this section completed. This report will provide the TRAC-IT ID, First Referral Date, Discharge Date, and Date of Birth:



You can rearrange the order of the columns by dragging the highlighted row to the order you would like.

Sort By:



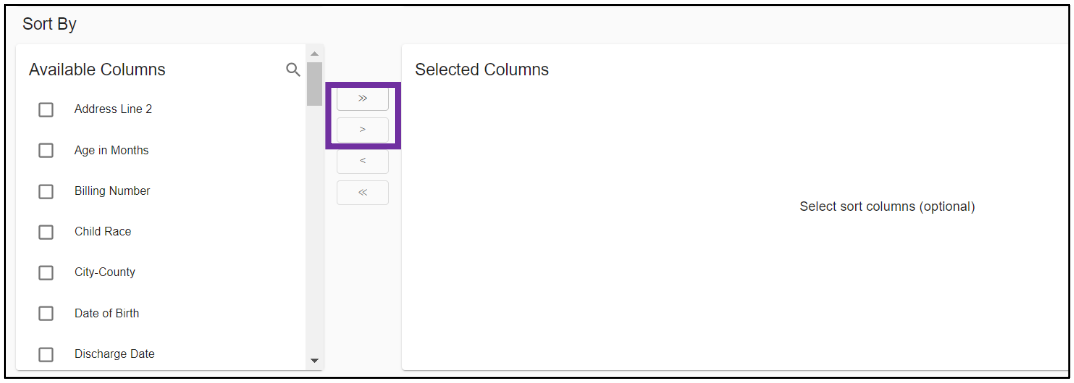
This optional section enables you to have TRAC-IT sort the data by one or more selected columns. If more than one column is selected, you can drag and drop the columns to identify which column to sort by primary, secondary, tertiary, etc. The potential fields you can select are the same as in the Output Columns and include the following:

- Address Line 2
- Age in Months
- Billing Number
- Child Race
- City
- City-County
- Client Entity Last Modified On or Before
- Client Entity Last Modified On or After
- Date of Birth
- Discharge Date
- Discharge Reason
- Eligibility Determination End Date
- Enrollment Referral Date
- First Name
- First Referral Date
- Forty Five Deadline Date
- IFSP Compliant
- IFSP Initial Meeting Date
- IFSP Timely
- Intake Visit Date
- Last Name
- Local School Division Eligible
- Local School Division Timely
- Local System
- Most Recent Eligibility Determination Date
- Most Recent IFSP Signed Date
- Next Annual IFSP Date
- Next IFSP Review Date
- Number of days since last IFSP
- Number of days until child ages out
- Number of services on IFSP
- Parent 1 Email
- Parent 1 First Name
- Parent 1 Last name
- Parent 2 Email
- Parent 2 Last Name
- Parent 2 First Name
- Primary Setting
- Service Coordinator
- Sex
- Spoken Language Other
- Spoken Language
- State
- Status
- Street Address
- TPC Compliant
- TPC Timely
- TRAC-IT ID
- Transition Plan Compliant
- Transition Plan Date
- Transition Timely
- Written Language Other
- Written Language

- Zip Code

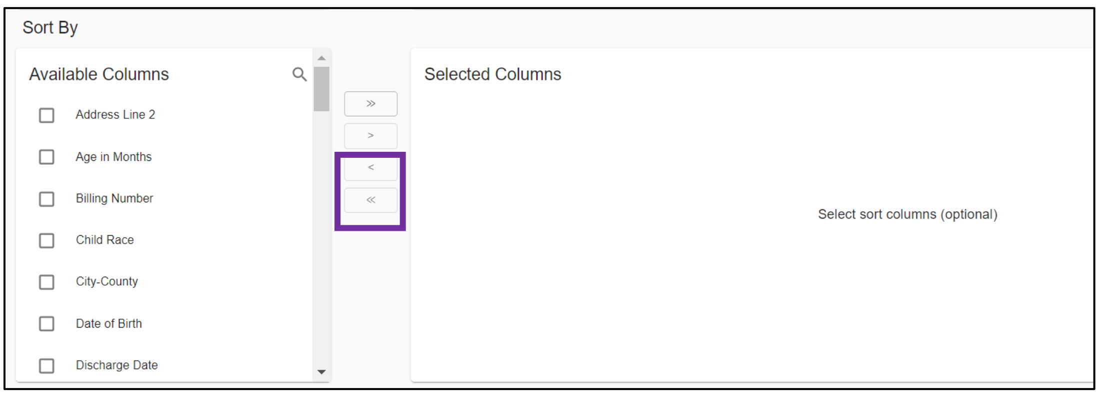
To select a sort by category, follow these steps:

1. Click on the box of the field you would like to sort by. You can click on more than one
2. Click on the arrow pointing to the right



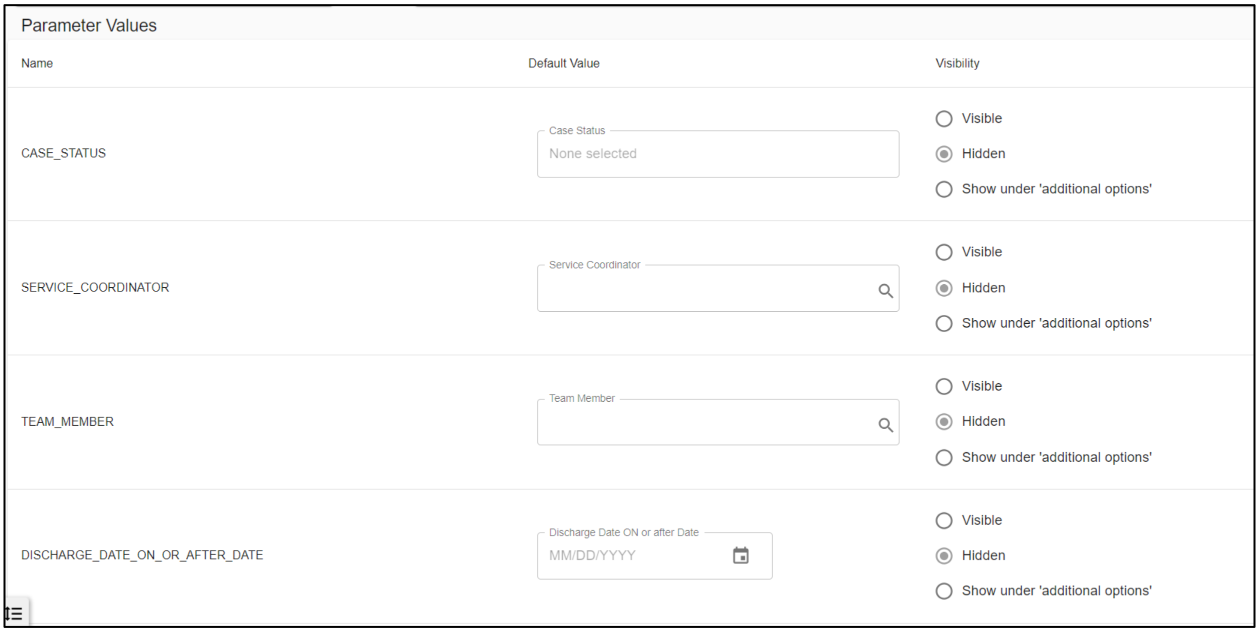
Clicking on the double arrow will add ALL the values to the Selected Columns tile. Clicking on the single arrow will add only the values you selected to the Selected Columns tile.

3. To remove an output, click on the arrows pointing to the left



Clicking on the double arrow will remove ALL the values to the Selected Columns tile. Clicking on the single arrow will remove only the values you selected to the Selected Columns tile.

Parameter Value:



Parameter Values

Name	Default Value	Visibility
CASE_STATUS	Case Status: None selected	Visible / Hidden / Show under 'additional options'
SERVICE_COORDINATOR	Service Coordinator	Visible / Hidden / Show under 'additional options'
TEAM_MEMBER	Team Member	Visible / Hidden / Show under 'additional options'
DISCHARGE_DATE_ON_OR_AFTER_DATE	Discharge Date ON or after Date: MM/DD/YYYY	Visible / Hidden / Show under 'additional options'

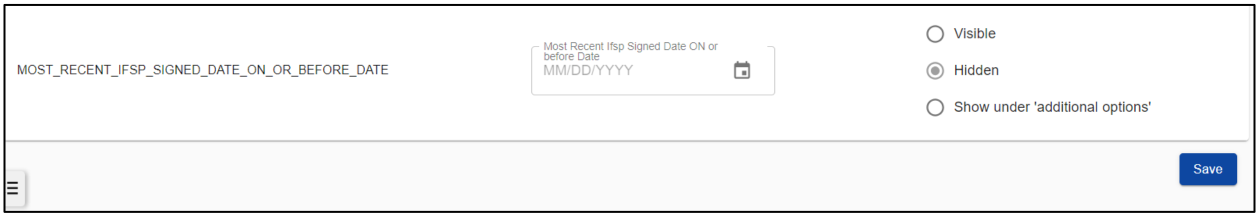
In the Parameter Value section of the report creation screen, you are setting the main filters for the report. For example, in the picture above, you can select the Case Status of Open or Closed or identify a Service Coordinator or Team Member. The parameters you can set are:

- Case Status (Open or Closed)
- Service Coordinator
- Team Member
- Discharge Date on or After Date
- Discharge Date on or Before Date
- Active On or After Date
- Active On or Before Date
- First Referral Date On or After Date
- First Referral Date On or Before Date
- First IFSP Meeting Date On or After Date
- First IFSP Meeting Date On or Before Date
- Most Recent IFSP Signed Date On or After Date
- Most Recent IFSP Signed Date On or Before Date
- Client Entity Last Modified On or Before
- Client Entity Last Modified On or After

When setting these parameters, you can decide if you would like this value hidden, visible, or shown under additional options.

Running the Report

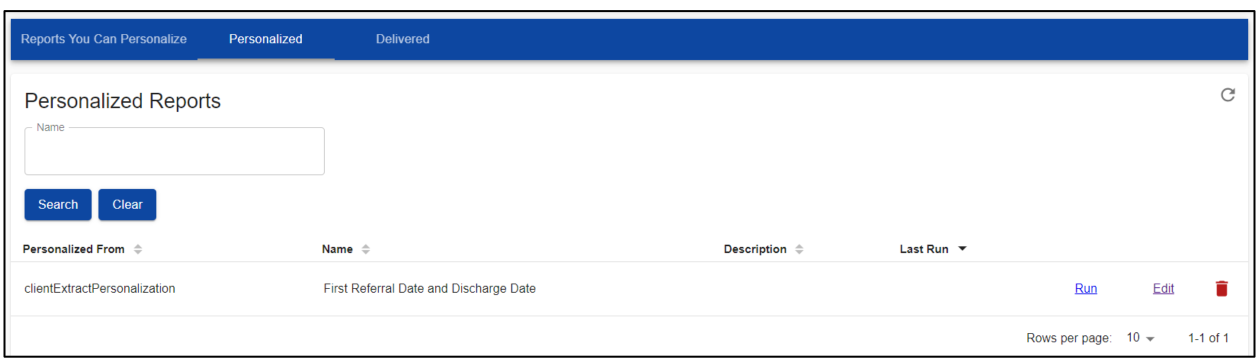
Once you have entered all the required fields, the blue Save button will be available:



After you click **SAVE**, the screen refreshes and you are brought to the top of the report creation screen. A new blue button appears enabling you to run the report:

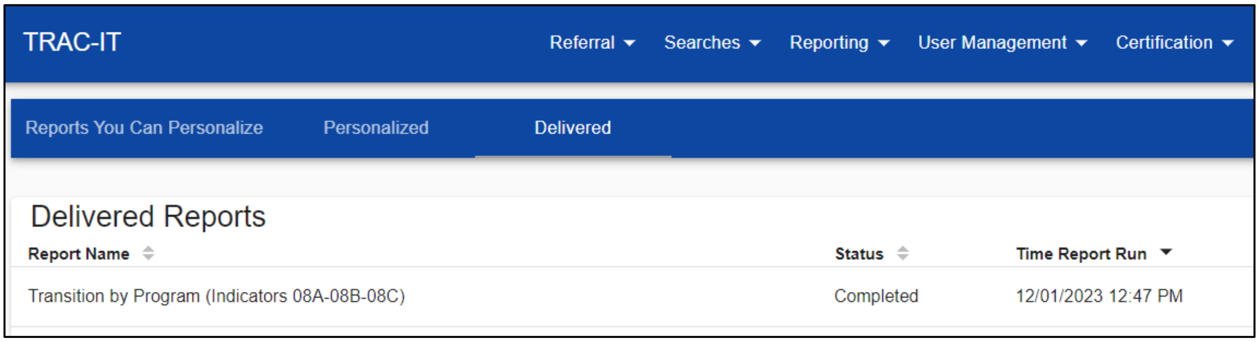
Note: You can edit this report or delete the report if you no longer need the personalized report.

Once you have saved this report, it is available in the Personalized option in the menu to run at any time in the future. For example, the report named *First Referral and Discharge Date* is listed on the main personalized reporting screen:



Note: You can run, edit or remove this report from this list view as well.

Accessing Delivered Personalized Report:



You can access any reports you have run, including the personalized reports, in the Delivered menu option pictured above.

Once the list of reports appears, follow these steps:

1. Click on the row of the report you would like to access
2. Click on the blue hyperlink in the report screen – this will download the report to your local device.
3. Open the report on your local device.