



Quick Steps for Running IMH Red/ Green Detail Report

- Click Reports and Select Print My Reports
- Select IMH Red/ Green Detail
- Click Print/Perform
- Select Beginning and Ending Dates to Match those Entered in the Summary Report
- Click Select under R/Client Providers and Select One or Multiple Option(s) to Match those Selected in the Summary Report
- Click Customize Report Layout
- Filter/ Export/ Print as Needed

The IMH Red/ Green Summary Report has to be Pulled Prior to the IMH Red/Green Detail Report

Detailed Steps for Running IMH Red/ Green Detail report:

Note: IMH Red/ Green Summary has to be pulled for the IMH Red/Green Detail report to work

1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.

🙆 St	aff Informa	tion Dialog					
		-Information for:					
<u>.</u>	Name	Data Team, Member (090025) As of (1/21/2018) No New Tasł There are No Open Tasks	ks have been Added	×			
				Staff Information			
	∃ Open Tasks	Name	ld	Supervisor's Name	Supervises	End Dt	2
	8						
($\overline{\mathbf{b}}$	Data Team, Member	090025				





2. From the top menu, click on **Reports** and then select **Print My Reports**. This will open up your list of reports.



3. Select the report IMH Red/ Green Detail then click Print/Perform.

1	Report Titles	Categor
8		
	IMH Case Summary	
	IMH Client Profile	
M	IMH Red/Green Detail	
	IMH Red/Green Summary	
	PIP Client Roster and Services Spreadsheet	

4. Select the appropriate **Beginning** and **Ending** date for the time period you are looking.

The dates entered into the detail report must match the dates entered into the IMH Red/Green Summary for the detail report to work accurately.

🗌 Separate Re	eports By	✓ Add Label ✓ to the output file name (e)	.g. c:\MyDocuments\StaffSummaryFor101.pdf)
Report Custon		(^	
-Selection Option -Report Dates	18		
Beginning	9/22/2016 • Ending	9/22/2016	✓ Clear Dates

5. Under R/Client Providers, click Select.

	-B/Client Providers-	· · · · · · · · · · · · · · · · · · ·		
I	The client Toylders			
	Select			

6. Click the option(s) to choose one, multiple, or all (**Select All** button) options from the list. If selecting only one or multiples (without selecting all) click the **OK** button.

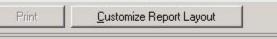
The selections entered into the detail report must match the details entered into the IMH Red/Green Summary for the detail report to work accurately.

Search for Name					how Only Codes Availa how Hidden		
	ld	Name		Type Id	Type La		
8							
•	1170002	IMH - Infant Mental Health Judicial District 13					
	1170003	PIP - Infant Mental Health Judicial District 13		1			





7. Click the **Customize Report Layout** button.



8. The following report (example below) will coincide with the IMH Red/Green Summary report you ran prior to this report.

Measure I	Case Name	Case Id	Related Client ID	Related Client Name	Included	Date of Screen	Eval status	Begin due date	End due date	Eval with 1 month grace period	Eval w/i due date	Assigned Staff	СТ
01-Date of Birth	Again, Colin	1160004			Included							Data Team, Member	
01-Date of Birth	Another test, Colin	1160017			Included							Data Team, Member	
01-Date of Birth	James, Bobby	1160021			Included							Data Team, Member	
01-Date of Birth	Mitchell, Mom	1160002			Included							Data Team, Member	
01-Date of Birth	Sanchez, Ben	1160020			Included							Data Team, Member	
01-Date of Birth	Sanchez, Brittany	1160018			Included							Data Team, Member	
01-Date of Birth	Test, Child	1160006			Included							Data Team, Member	
01-Date of Birth	Test-Case, Baby	1160009			Not Included							Data Team, Member	
01-Date of Birth	Test-Case, Brother	1160010			Not Included							Data Team, Member	
01-Date of Birth	User, Test	1160013			Included							Data Team, Member	
02-Gender	Again, Colin	1160004			Included							Data Team, Member	
02-Gender	Again, Colin	1160004			Included							Data Team, Member	

9. To filter the measures in a way that reports out which clients are missing information, place your mouse over the column labeled **Included** until the filter option appears. Click the filter, then check the box next to the **Not Inlcuded** option.

Related Client Name	Include Ϋ d	Date of Screen	Eval status
	Not Included		

10. To filter a report by assigned staff member, click in the upper right hand side of the **Assigned Staff** column until the filter option appears.

Check the box next to the staff member(s) for review.

- 11. To export the filtered report for printing/ reviewing:
 - a. Select the copy to clipboard icon in the bottom left corner of the Report Layout Options, open an excel sheet and paste/ format/ save/ print.



b. To keep the exact formatting of the information that has been filtered/ expanded, click on **Reports** and then select **Export Grid f**rom the top menu.







From the Grid Export Options, choose **Create a Worksheet from the Grid, Including** Formatting and Coloring.

Click the Export Grid to Excel button and format/ save/ print.

Form Name	User Report Options	
Grid to Export	cxAptGrid 👻	
-What Would You	Like To Do?	Г
O Copy the Cont	tents of the Grid to the Clip Board	S
💽 reate a Work	sheet from the Grid, Including Formatting and Coloring	E
O Put the Conter	nts of the Grid in a Specific Part of a Worksheet	
File Information		
Export File Nam	e 🚮 GridExport	
Export file Nair		
	10 1	
Export Grid To Ex	cei Uptions	
- 11 - 11 - 11 - 11 - 11 - 11 - 11 - 1		
Included Data	a Hidden in Collapsed Groups	
 ✓ Included Data ✓ Save All Reco 	a Hidden in Collapsed Groups ords - Ignore Selection	
Included Data	a Hidden in Collapsed Groups ords - Ignore Selection	
🗹 Save All Reco	a Hidden in Collapsed Groups ords - Ignore Selection	

If you need further assistance please contact the ECSC Database Services Team: ecscdata@unm.edu

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