

**Office of Developmental Disabilities Services
Reports Quick Reference Guide:
Canned Incident Management Reports**



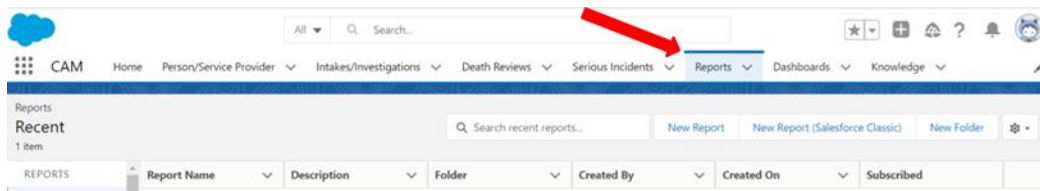
Reports

All information in CAM can be seen in through running a report. A report can be generated based on any information that has been entered into CAM including the objects (commonly referred to as “tabs”) or the fields within each object. Any information available in any object or field within an object can be generated using the exact language of the object or field.

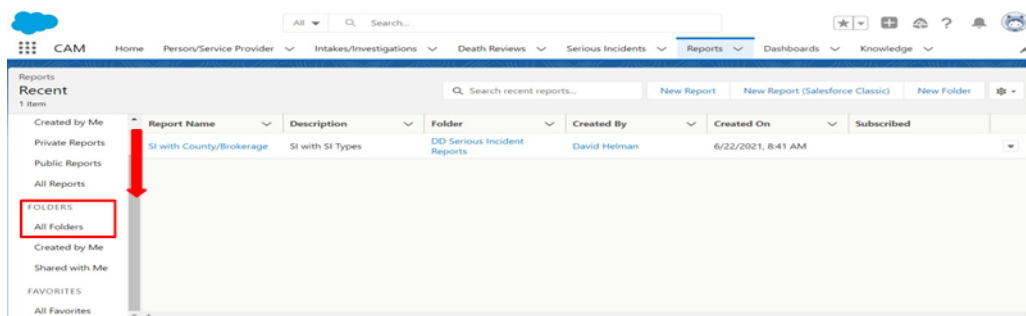
Reports can be created by any CAM user for data that the CAM user can access. ODDS has created several pre-made canned reports within CAM related to Incident Management Team (IMT) reports including Serious Incidents, Recommended Actions, Investigations/Intakes, and Death. It is important to note that what a user can access in reports is dependent upon the user’s role in CAM.

Running a Canned Report for a CMEs Serious incidents

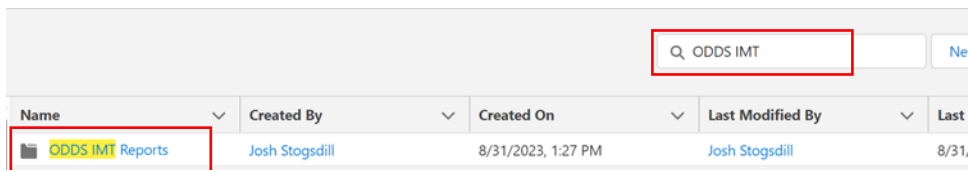
1. Select the Reports tab to return to the Reports main page.
 - a. Every report that the user has previously ran or created will show in the center of the page. Each report name is hyperlinked to the report itself.



2. On the left-hand side will be a set of reports and folders. Scroll down to find and click on “All Folders”.
 - a. Access is dependent upon each user’s role in CAM. If a user selects a report that is blank when opened, then that user does not have access to that information.

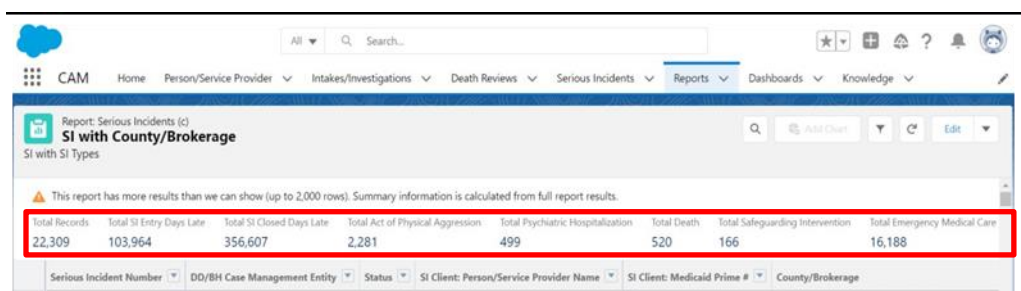


3. Scroll down or use the search feature to find “ODDS IMT Reports”.
 - a. This folder contains several canned reports. **Note:** This folder is intended to store canned reports created by ODDS as a resource for CMEs. If other reports are created and stored in here, they will be removed. If your CME creates their own reports, you will need to create a separate folder to store these reports in.

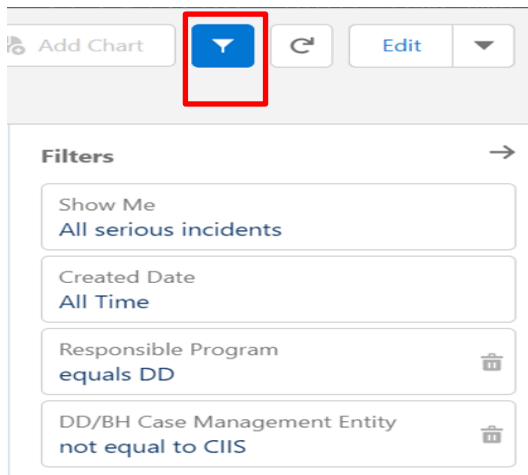


4. Scroll down to find the Canned reports created for CMEs.
 - a. “DD SI County/Brokerage” will create a report of all Serious Incidents. What a user can access in this report is dependent upon the user’s role in CAM.
 - b. “DD SI with Recommended Actions – No RA” will create a report of all Serious Incidents and their recommended actions. What a user can access in this report is dependent upon the user’s role in CAM.
 - c. “DD Intakes/Investigations” – will create a report of all DD Intakes and Investigations. What a user can access in this report is dependent upon the user’s role in CAM.
 - d. “DD Death Reviews” - will create a report of all DD Death Reviews. What a user can access in this report is dependent upon the user’s role in CAM.

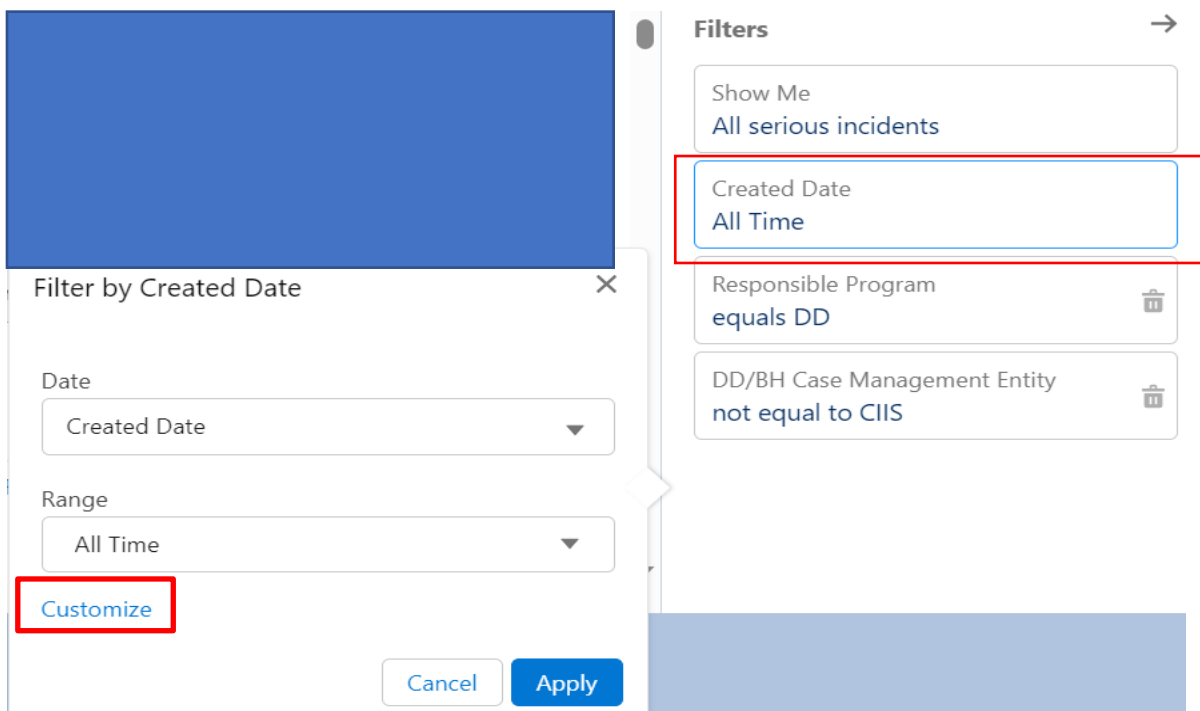
5. Click on the report needed.
 - a. The banner at the top of the page is a running total of the Serious Incidents the user has access to in the selected report. What a user can access in this report is dependent upon the user’s role in CAM.



6. At the top right - there is a filter button. Select this “filter” button.



7. Once you have selected the “filter button” select the “created date” field. This will show you some preset options to filter from the CAM system. From here, select the “customize” link.



8. First, you will need to fill in the “Start Date” and “End Date” for your report. For example, if you are looking for quarter one you would select January 1 as the start date and March 31 as the end date. Once you have your dates entered, click “apply”.

Filter by Created Date ×

Date
Created Date

Range
Custom

Start Date
1/1/2023

End Date
3/31/2023

Cancel Apply

9. Once your dates are “applied” to the report, you will see them the right side of the screen. Verify that the date range is correct before moving on.

Filters →

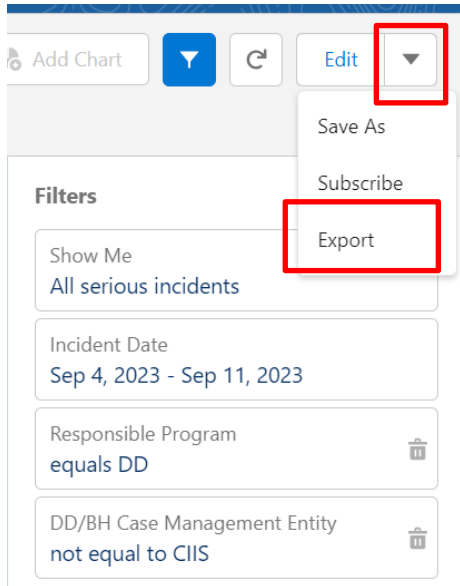
Show Me
All serious incidents

Created Date
Jan 1, 2023 - Mar 31, 2023

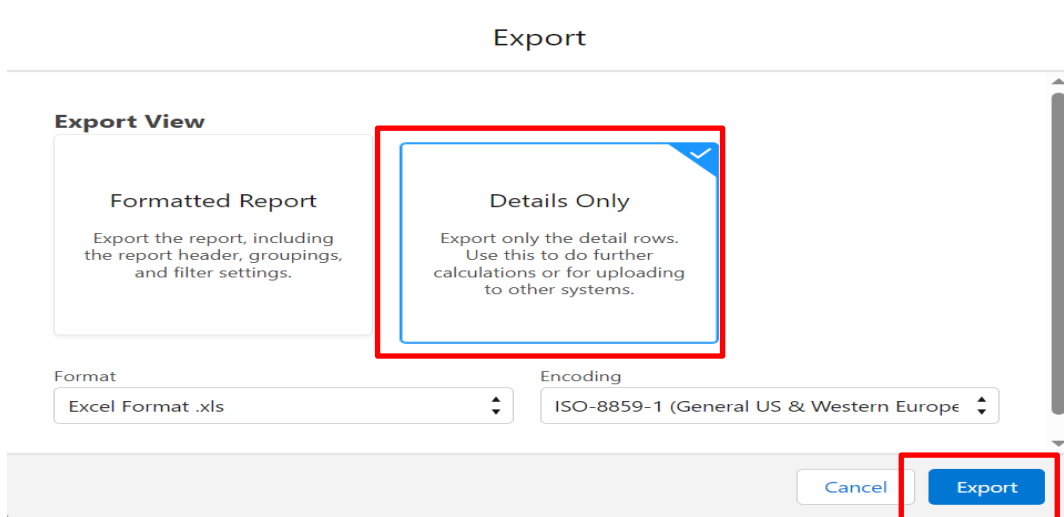
Responsible Program
equals DD

DD/BH Case Management Entity
not equal to CIIS

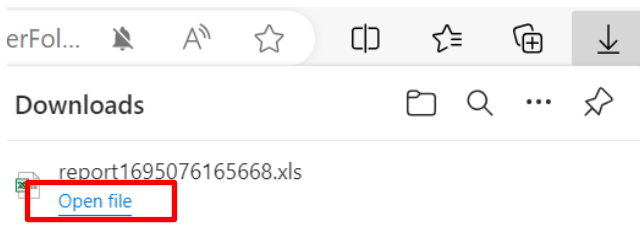
10. Once you have customized the report, on the right side of the screen select the drop-down button next to “edit” and choose “export”.



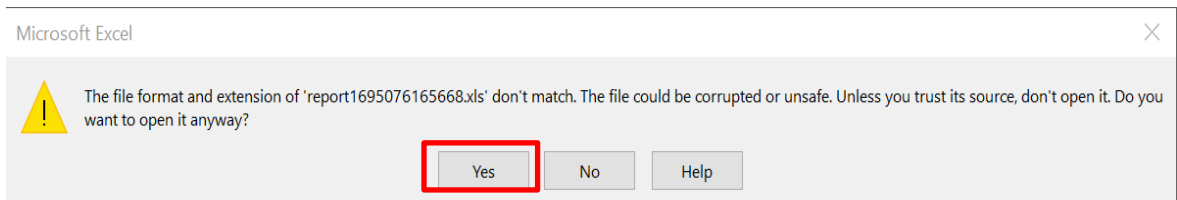
11. From here you can export the report to Microsoft Excel. You will want to select “Details Only” and then select “Export”.



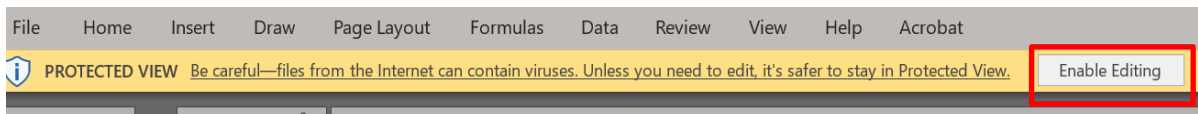
12. The exported report will be in your browser’s downloads. You may be notified of this with a pop up. From here, select “Open File”.



13. Depending on computer settings additional validation may be necessary to open the report. This is a standard validation. Click “Yes”. Depending on the volume of data contained within the report, it may take several seconds to a minute to load.



14. Once you open the downloaded report in Excel, you will need to select “Enable Editing” to navigate and filter the data report.



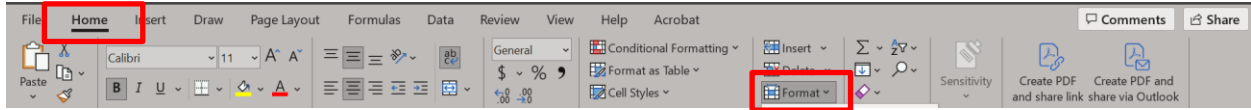
Viewing a report using Excel

CAM will automatically display the report in a prefiltered, tabular format. This format allows the user to see all lines of data organized beneath in columns using the CAM field as the heading of the column. Reports often contain large summary notes that can alter the height of a row, making navigation within the workbook difficult. Reports will most likely export and look like the below image, with various row heights.

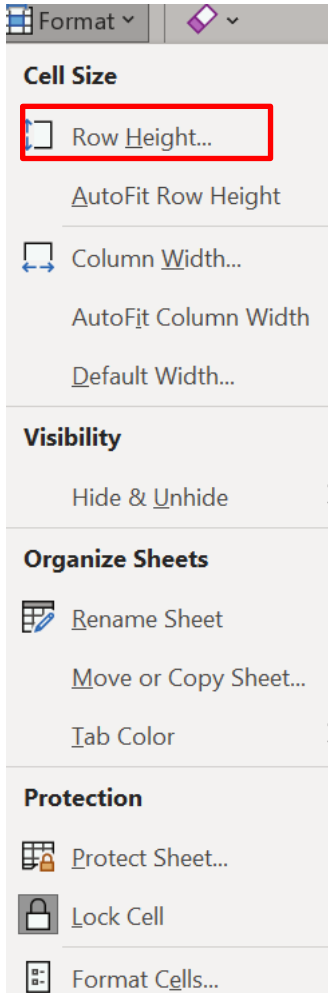
1. To create a uniform report, navigate to the upper, left-hand corner, of the workbook. There the user will find an arrow between the A column and 1 row. Click the arrow to highlight the report.

1	Serious Incident Number	Status	Responsible County: Person/Service Provider Name	Incident Date	Date/Time Opened	SI Due Date	Recommended Action #	No Recommended Action #
2		SI Closed		10/13/2019	10/14/2019 8:15		0	1
3		SI Closed		10/12/2019	10/14/2019 10:12		0	0
4		SI Closed		10/10/2019	10/14/2019 8:21		0	0
5		SI Closed		10/13/2019	10/14/2019 10:31		0	0
6		SI Closed		10/12/2019	10/14/2019 10:55		1	0
7		SI Closed		10/12/2019	10/14/2019 11:34		0	0
8		SI Closed		10/13/2019	10/14/2019 11:54		0	0
9		SI Closed		09/27/2019	10/14/2019 13:16		0	0
10		SI Closed		10/14/2019	10/14/2019 13:47		1	0
11		SI Closed		10/12/2019	10/14/2019 13:55		0	0
12		SI Closed		10/07/2019	10/14/2019 13:51		1	0
13		SI Closed		10/12/2019	10/14/2019 14:04		0	1

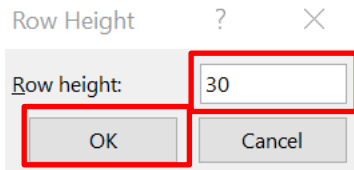
2. Once highlighted, click on “format” in the ribbon under the “Home” tab.



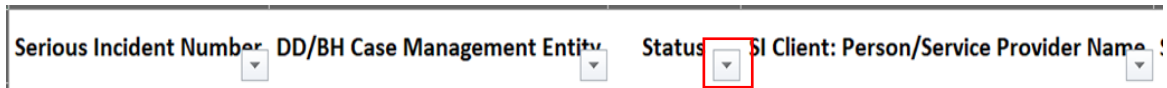
3. Select “Row Height...” to adjust the display, creating a uniform report that is easier to navigate. A recommended height is either 20 or 30.



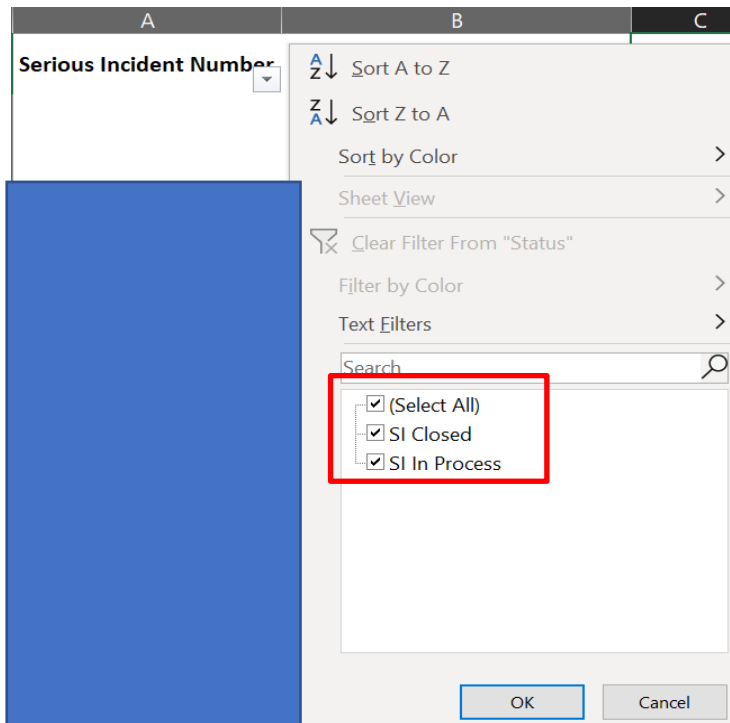
a. When the desired height is entered, hit “OK” to add the value. The rows are uniform in height.



4. As previously stated, all criteria in the report will automatically export into a workbook. Filters are represented by a small box with a downward arrow (sometimes referred to as caret(s)) next to the column's header.

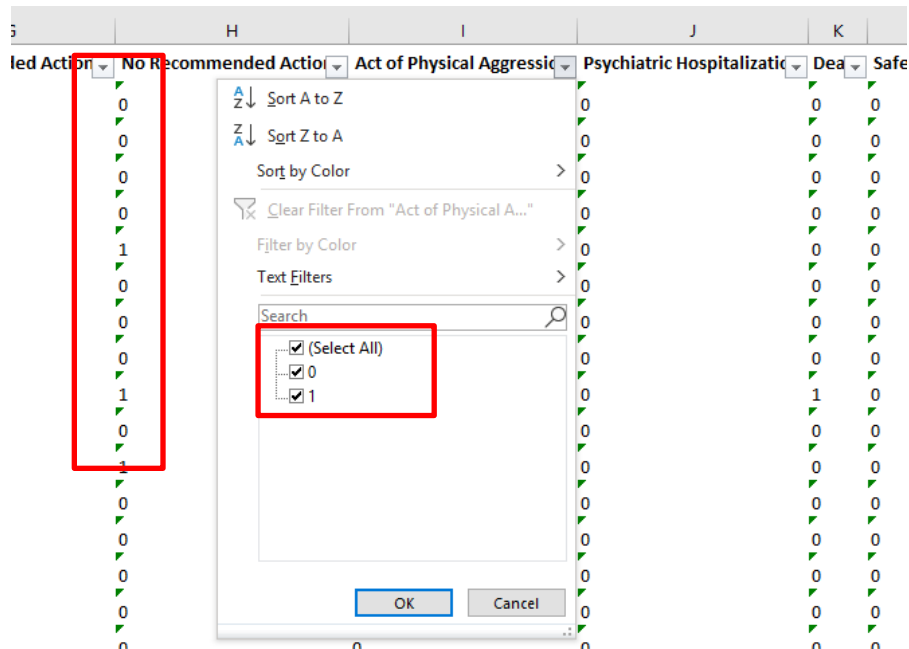


- a. These filters can be clicked on to open, with an option of every data element contained within that column.



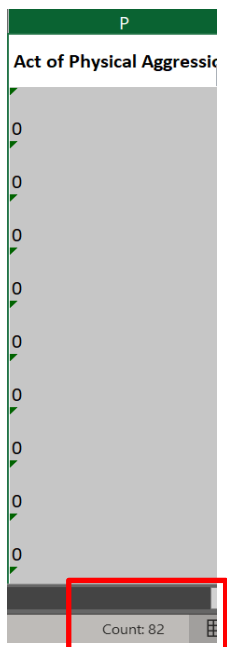
- b. In the example above, the filter for “Status” was chosen. Select, or de-select, which elements should be displayed within the report. This will limit the amount of data available. Items de-selected will be hidden (filtered out) of the report at this time. No information will be lost at this point. To display hidden information, simply choose the filter and (Select All) to display hidden items. You can change this at any point while reviewing the report to answer specific questions. For example, if I wanted to see the total number of “SIs Closed” in this report, I would only select “SI Closed” in the filter options.

- c. When information is displayed as a 1 or a 0 (see below), these are Yes/No values in Excel. For example: All ten Serious Incident types within the report will have a string of 1’s and 0’s beneath their headers. 1=Yes 0=No. A user can filter whichever incident is needed to be displayed on the report. For example, a report to display all SIs that are an Act of Physical Aggression, choose the filter for that SI type and select only the 1 value. This will filter out any SIs where Act of Physical Aggression was not an SI type.



- d. Multiple filters can be applied simultaneously, further narrowing the information displayed in the report. Filter management is critical, since users can often forget what they have applied a filter to, hiding unintended fields. Best practice is to double check all filter boxes to ensure that only the filters selected are those intended to display. When you are done answering a specific question, before moving on it is best practice to undo the filter selections you just entered to ensure you are not missing any data elements before responding to another question.

5. When the data is highlighted, the column will appear grey, and a count of the data/selected cells will be displayed at the bottom of the workbook window. In the example below, there were 82 SIs for the selected SI.



6. Using the steps above, you can access any of the Canned Reports in the “ODDS IMT Report” folder and filter the data you run to answer specific questions and complete reports, such as the quarterly IMT report for your CME.