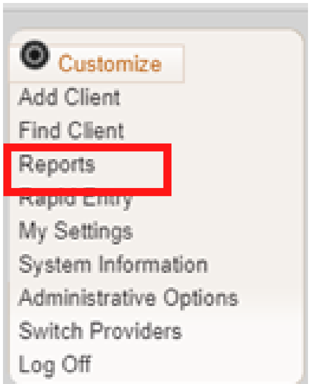
HOW TO RUN CUSTOM REPORTS

01 Select **Reports** from the Main Menu.



02 Select **Custom Reports** from the link menu.

03 Select **Manage/Run Custom Reports** from the link menu.

04 Select **Run Report**.

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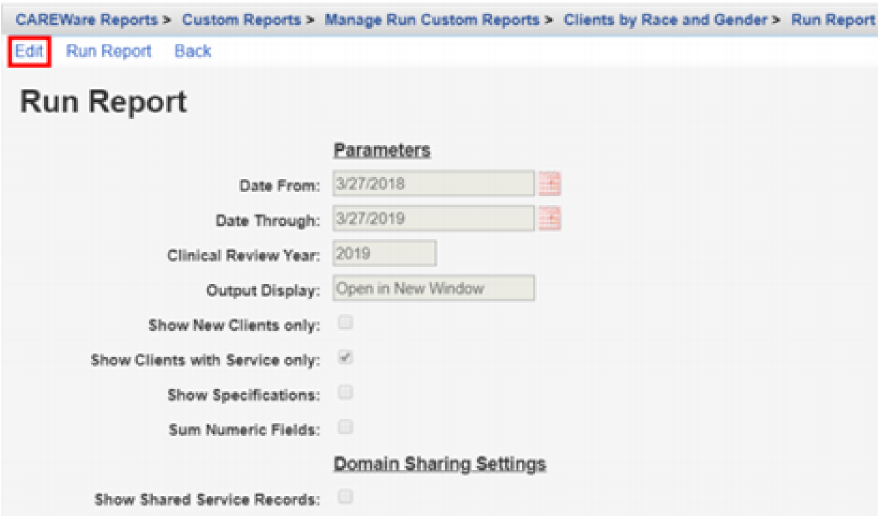
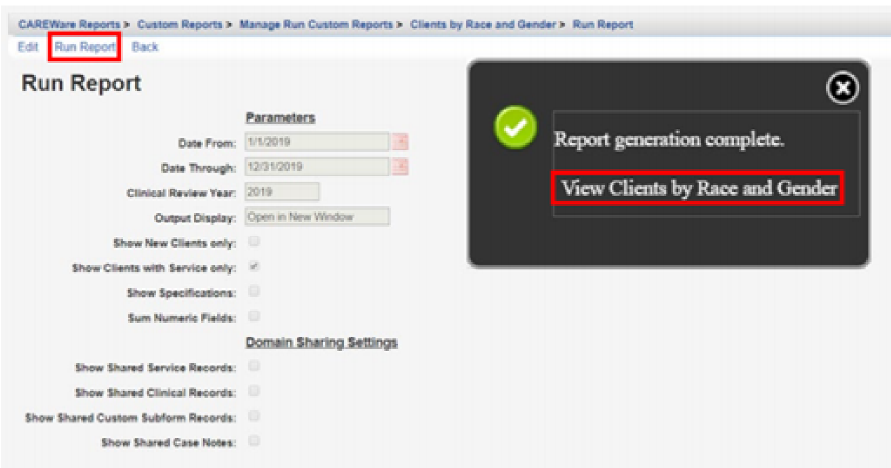
05 Click **Edit**. Select the following report parameters and click **Save** (will be visible after clicking Edit).
•Date From
•Date Through
•Clinical Review Year (optional – typically matches the reporting year)
•Output Display – Download as CSV – Open in New Window – Open as PDF
•Show New Client only (check box)
•Show Clients with Service only (check box – will only list clients with services within date span)
•Show Specifications (check box – to list report criteria)
•Sum Numeric Fields (check box)
•Domain Sharing Settings (default value)



06 Click **Run Report** and then click **View** [name of report] (in this example, View Clients by Race and Gender).



The report will appear in a new tab within your browser.