Create a Custom ACTS Report

Report Customization

Beginning with ACTS, and including AEM and AST, a large number of ASPEN reports provide powerful customization features so you can quickly create reports that focus on the information you need to know. These reports are based on the expansive amount of information you already enter in ASPEN. Multiple filters can narrow the detail of your report to highly specified requirements. Report criteria you specify can be saved and used again.

Running a report does not alter the data in ASPEN, but rather offers a way to review specific information more efficiently. Reports can be a useful tool for example, when monitoring and using complaint data already captured.

Report features are tailored to the application. You can filter ACTS reports by Intake Status, for instance, while in AEM you can filter by Case Type.

ACTS Report Features

Defaults

When you open the ACTS report customization window, the filter choices (boxes that are checked) default to the selections that are currently active in My Selections, where possible.

Settings

Once you have report filter criteria set to your satisfaction, you can use the Report Settings section to name the format you created and save its settings for later use on this report or others. The report date range is not saved with custom formats.

When you pull up a stored format to run a report, you can change the settings as needed, but the new settings will not be saved. Any changes you make to a format have to be saved under a new name, or the same name can be re-entered and re-saved.

Basic Options

ACTS Report Date and Group by Selections

Field	Description
Report Date	Specify a date range for the report.
Base time frame on	Choose either the Received End Date of the intakes or the Exit Date of the surveys to use as the report date range. For the Investigation Log and some timeliness reports, you have the option of intake Closed date.
Group by	This option is available only for Complaint/Incident Investigation Log, Incidents Resulting in Deficiencies Detail, Intakes without Scheduled Surveys, and Substantiated Complaints Details reports. You can group results by Provider, Provider Type, or Responsible Team.
Sort By	This list appears for applicable reports. Sort options include a subset of the following, depending on the report: Due Date, Provider Name, Provider Number, Intake Number, Received End Date, Exit Date.

Field	Description
Print Report Definitions	Select this checkbox to generate a separate page at report end that provides a detailed list of the filter settings you select in this window. A condensed list of filters appears in the footer of the report whether or not this checkbox is selected. Due to the many filtering options, the list may be truncated.

We will set criteria for a Federal Investigation Timeframe report. This report shows timeframes for survey investigations after the intake is received.

1 Print report

- Open **ACTS**.
- Activate the **NH Open** selection set.
- Select **Reports | Federal Only | Federal Investigation Timeframe Reports | Long Term Care | Non-IJ High.**
- For Date Range, select the **Last Calendar Year.**
- Beneath the Report Title field, locate Sort By, and check that **Provider Name** is selected.
- Scroll down to view the **Allegation Type** section.
- To print this report for intakes with only Dietary Service allegations, click **De-Select All.**
- Click the **Dietary Services** checkbox.
- Accept the defaults for the rest of the report. Notice the Provider Type section only has Nursing Home facility types enabled. This is because our active selection set is NH OPEN. In certain reports, this filter is still available for configuration.

Save these settings under a file name: **<A> Dietary Investigations**, where A is your training letter.

- Scroll back to the top of the customization screen.
- In the Report Settings section, select the checkbox for **Save Settings as.**

The field to the right becomes enabled so that you can enter a file name for saving the report settings.

- Type **<A> Dietary Investigations**, where A is your training letter.
- Click **OK** to generate the report.

ACTS gathers the data for the report, and presents it in the preview window.

From there, you can click the **Print Report** button to print, or click the **Export Report** button to export the report, as needed. We are not going to do either in the class.

By default, Print Report Definitions was selected for this report. Go to the last page of the report to see the definitions.

- After reviewing your report, select **File | Close**
- Click **Reports** to reopen the Reports list, then select **Federal Only | Federal Investigation Timeframe Reports | Long Term Care | Non-IJ High**
- In the Report Settings section, expand the Name of Stored Settings field, and select **<A> Dietary Investigations**, where A is your training letter.

The same filter options you used before are enabled/disabled. You can customize the filter options again, but you must save the new configuration with a different name for it to be available next time.

- Close the report customization screen.

> Now, we will set criteria for a Timeliness report, which has a secondary customization window.

Secondary Customization Window

The Timeliness report shows intakes that exceed the user-specified interval for one of eight resolution actions: Triage, Acknowledgement, Investigation, Post-Survey Contact, RO Action, SOD Issuance, and both Received and Forward to Closure. The SOD Issuance and Forward to Closure actions are new in ASPEN 10.2.

1 Print report

- Open **ACTS**
- Activate the **NH Open** selection set
- Select **Reports | Timeliness Reports**
- For Date Range, select the **Last Calendar Year**
- Accept the defaults for the rest of the report.
- Click **OK**

The Timeliness Report Customization window opens. This is a secondary customization window, which appears for select ACTS reports.

- Select the **SOD Issuance (Exit Date > 2567 Issue Date** option, and enable **Group by IJ/Condition Level**
- Type **10** for the number of interval days
- Click **OK** to generate the report.

ACTS gathers the data for the report, and presents it in the preview window.

From there, you can click the **Print Report** button to print, or click the **Export Report** button to export the report, as needed. We arre not going to do either in the class.

By default, Print Report Definitions was selected for this report. Go to the last page of the report to see the definitions.

- After reviewing your report, select **File | Close**.