



AQORD PEER Support Services

Advanced Guidelines for Creating Reports in PEER

This Advanced Guideline is intended for those who have mastered simple reports and would like to build more complex reports from scratch. As always, you can use “Admin Picks” as another method to create reports. This document takes you through the creation of some more advanced and frequently used reports, such as, Line Chart, Bar Chart and a Cross tab report.

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Accessing the Report Manager



The Report Center in PEER is accessed by clicking the Report icon on the left side of the screen.

Remember that only File Managers with Reports, Risk Managers and System Administrators can access this center. If you are unable to access the Report Center and you believe you should have access, contact the Risk Manager at your organization for assistance.

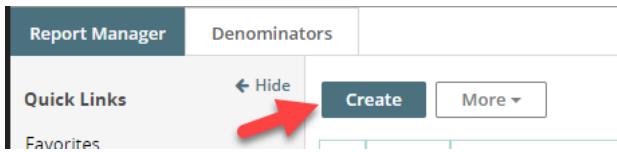
Module	Report Name	Report ID	Description
Risk	Entrapment Risk Report	1001244	
Risk	Medication Errors - for Risk Mgt	1000919	
Risk	Risk Complaints and Grievances Campus Wide	1001811	
Risk	Risk Severity 3+ to CCSS Last Quarter	1001929	

The Report Center contains two tabs at the top: Report Manager and Denominators. You will use the Report Manager tab.

When creating a report, think clearly about what data you are looking to show and how you want to display it. In our next example, we want to create a trend report that would show all falls for a specific Current Level of Care (ex. Skilled Nursing) by month for a given year (this can be any period). This would best be displayed in a line chart where the line will show the number of falls for a specific Level of Care for each month over a year. Remember that when creating a report in PEER, you will need to know field names so that the correct information will populate the report. If possible, print a copy of an event report for a fall so that you will be able to see the names of the various fields (the field is the question on the left side of the page, some of which have green asterisks next to them if they are mandatory). Once you are familiar with the names of the various fields, creating reports is easier. Common fields used in reports are General Event Type (i.e., falls, skin/tissue, med errors), Specific Event Type (i.e., fall from wheelchair, omitted medication, unknown skin tear/bruise), Current Level of Care (Skilled Nursing, Assisted Living, Independent Living), General Location (depends on how your organization's location list is set up, but might be the name of the unit, the floor of the building, the type of residents cared for), or the Event Location (again, look at your organization's location list in PEER).

Creating a Line Chart Report

To create a report, click on the **Create** button from any area of the Report Center. This will open the Report Editor and allow you to create a report from the very beginning.



Example 1: Trend Line chart for a Specific Level of care

A line graph trend report with a single line that would show all falls for a specific Level of Care (Skilled Nursing) by month for a given year.

A screenshot of the Report Editor. The top bar says 'Report Editor'. Below it, a section titled 'Report Type' is expanded, showing configuration options for 'Style' (Pie Chart, Bar Chart, Stacked Bar Chart, Line Chart, Bubble Chart, Simple List Report, Crosstab Report), 'Module' (Risk, RootCause), 'Orientation' (Portrait, Landscape), and 'Size' (Letter, Legal, A4). Below this, other sections like 'Titles', 'Details', 'Date Range', and 'Conditions' are listed but collapsed.

When you open the Report Editor, you will see the following screen.

The five (5) different sections will need to be completed to run your report. The first report example in this document is a Line Chart report titled *Falls by Current Level of Care*.

Remember – to open or collapse a section, click on the triangle next to the title. Some sections in the Report Editor will not open until the preceding sections are completed.

Report Editor

Report Type

Style	Module
<input checked="" type="radio"/> Pie Chart <input type="radio"/> Bar Chart <input type="radio"/> Stacked Bar Chart <input checked="" type="radio"/> Line Chart <input type="radio"/> Bubble Chart <input type="radio"/> Simple List Report <input type="radio"/> Crosstab Report	<input checked="" type="radio"/> Risk <input type="radio"/> RootCause
Orientation	Size
<input type="radio"/> Portrait <input checked="" type="radio"/> Landscape	<input checked="" type="radio"/> Letter <input type="radio"/> Legal <input type="radio"/> A4

Titles

type in the name of the report in the text boxes.

Titles

Report Title: Falls by Current Level of Care Click to add variables

Sub Title 1: 2019 Click to add variables

Sub Title 2: {Filter} Click to add variables

Footer: Click to add variables

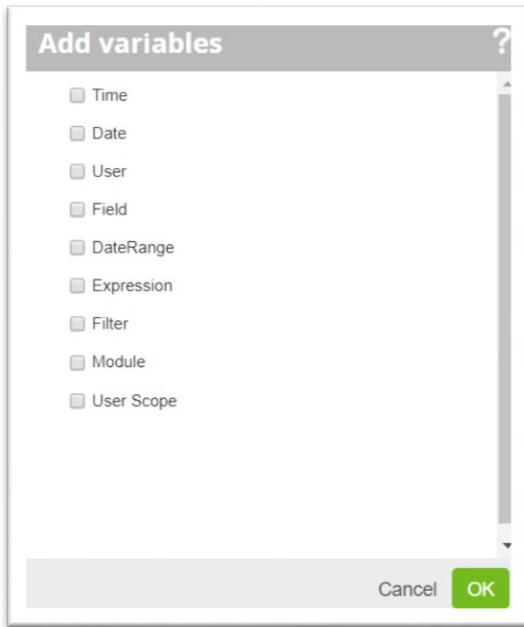
This title can be adjusted at any time by going to the Titles section and changing the information in the text box.

The Subtitles are available for additional text such as date ranges, Level of Care, etc. You can also add variables (self-populating choices that are updated every time you run the report). We recommend adding the Date variable in the Footer text box so that the run date is shown each time you run the report.

Select your Style (Line Chart will be selected for the first example), select the Module (Risk), and select the Orientation (for Line Chart, we recommend Landscape).

As you select the Style, you will see the Chart Details section automatically open with the different data fields that are available for that Style of report.

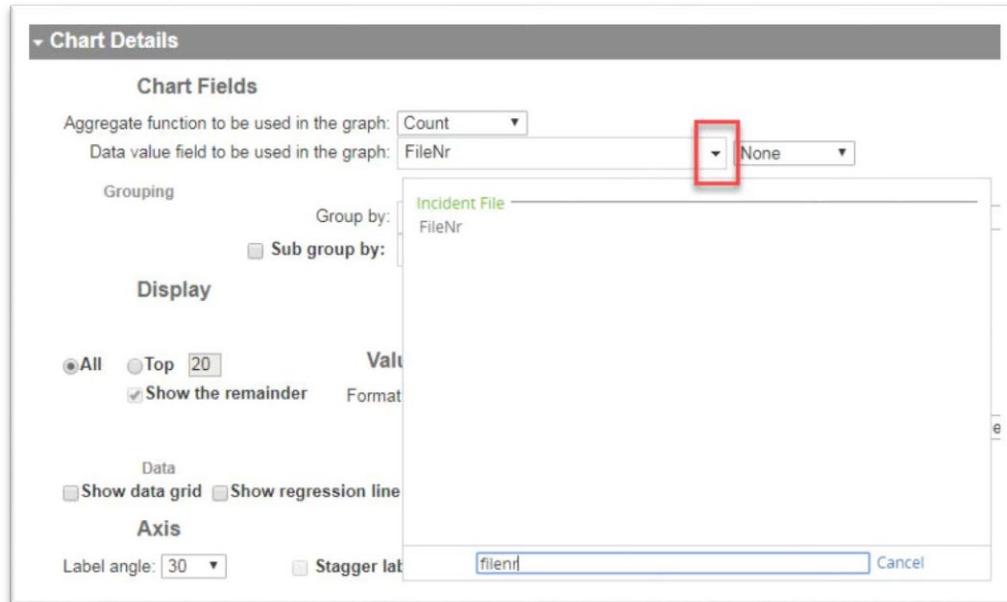
Next you will need to open the **Titles** section by clicking on the arrow next to the heading. Once open, you can



After clicking the green button “Click to add variables” (see above screenshot), a pop-up box will show. Select the variable you wish to add and then click OK. It will show up in the text box with { } around the variable you selected.

The Filter variable is automatically added in Subtitle 2 in the report template. To remove this variable, simply highlight it in the text box and delete the term {Filter}. To add the Filter variable back in, follow the directions above.

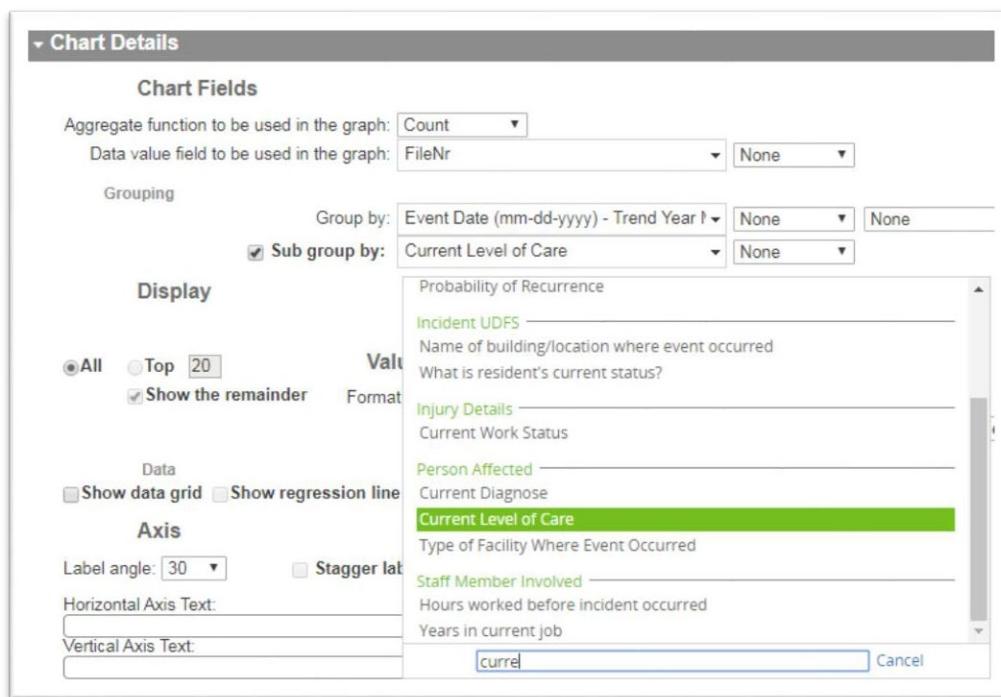
Next is the **Chart Details** section. Remember that the section heading changes depending on the Style of report you select. For this report example, *Falls by Current Level of Care*, we want the report to count the number of falls for each specific Current Level of Care over a period.



A Line Chart report can count the number of files in certain categories. In the first field function, select Count. The data field that you want to count in PEER is FileNr (these numbers are unique, so it allows the software to count the number of individual files in the groups you select).

Select FileNr by clicking the triangle/arrow in the Data value field (see above) and typing the name of the field that you want in the text field at the bottom of the drop down. Highlight and click the field and it will populate the field. Once you start typing a word, the selections narrow until you get to the choice you want. If you are unsure of the terminology or exact field name, try typing a word that is in the name and see if your choice is there. If you are not sure of the term you need, you may need to reference an event form to find the term you wish to use. In some cases, you also need to pay attention to the section titles in green with a bar next to them. That references the section where the term exists in the forms themselves. Sometimes multiple sections have the same term, but this does not happen very often.

Now you select the Grouping. For this report example, *Falls by Current Level of Care*, we want the report to trend over a period.



At this stage, we would only see a count of the files by the month in the time period. To further be able to identify the Current Level of Care in the report, we will Subgroup by Current Level of Care. Click the check box beside Subgroup by: then the arrow beside it, search for and select the field Current Level of Care.

In the Group by: field, click the arrow and in the drop down box text field, start typing the grouping term you want to use, click the term and it will populate the field. In this report, we are grouping by *Event Date (mm-dd-yyy) – Trend Year Month Name*. Other ideas for grouping include Entered Date trend fields.

At this stage, we would only see a count of the files by the month in the time period. To further be able to identify the Current Level of Care in the

Chart Details

Chart Fields

Aggregate function to be used in the graph: **Count**

Data value field to be used in the graph: **FileNr**

Grouping

Group by: **Event Date (mm-dd-yyyy) - Trend Year** ▾ **None** ▾ **None** ▾

Sub group by: **Current Level of Care** ▾ **None** ▾

Display

All Top **20**

Show the remainder

Values **General** Grand Total Show point labels

Show the grand total Angle **90**

Point Labels

Overlapping Mode **None**

Data

Show data grid Show regression line

Axis

Label angle: **30** Stagger labels

Horizontal Axis Text: **Current Level of Care - Skilled Nursing**

Vertical Axis Text: **Number of Files**

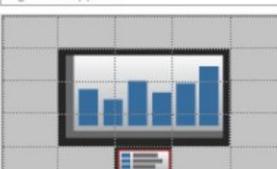
Add Horizontal and Vertical Axis Text so that it can display on the report. For this report, in the Horizontal Axis Text add *Current Level of Care – Skilled Nursing*. And for the Vertical add *Number of Files*.

The Display and Values data are usually not adjusted for this type of report.

Legend

Position

Click in the quadrant where you want the legend to appear.



Visibility **Visible**

Values Format: **General** ▾

Direction **Bottom to Top** ▾

The Legend is the last part of this section. You can adjust the position of the legend on the grid.

If the legend is visible, you can move it by clicking a box on the grid and the legend will move to that box.

If you do not wish the legend to be visible, simply uncheck the box.

Now open the **Date Range** section by clicking the triangle next to the title. This is where you set your date range for the report.

Date Range

Please select the relevant time period:

For: Event Date (mm-dd-yyyy)

All dates
 Today
 This week
 This month
 This calendar quarter
 This fiscal quarter
 This calendar year
 This fiscal year
 Custom

Yesterday
 Last week
 Last month
 Last calendar quarter
 Last fiscal quarter
 Last calendar year
 Last fiscal year
 Last

From:
 to:

You must first pick a date that the report will reference – the Event Date (in the Incident section) in this case.

To select this, in the For: box click the arrow and in the text field at the bottom of the drop down box, start typing the term Event Date.

It is best to keep the date field used in this section, the same as the date field being used to group the report in the Chart Details section.

Now you select the Date Range you want the report to reference. You can select the Date Range by using one of the available terms such as Last calendar year.

The final section to complete is **Conditions**. This is where you select the conditions that you want in the report. For this Line Chart, we want to “condition” the File State, General Event Type and Current Level of Care so that we narrow down the results to only show what we need. Selecting and connecting conditions can be tricky and may take a couple of tries until you get the right conditions set.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed.

Conditions

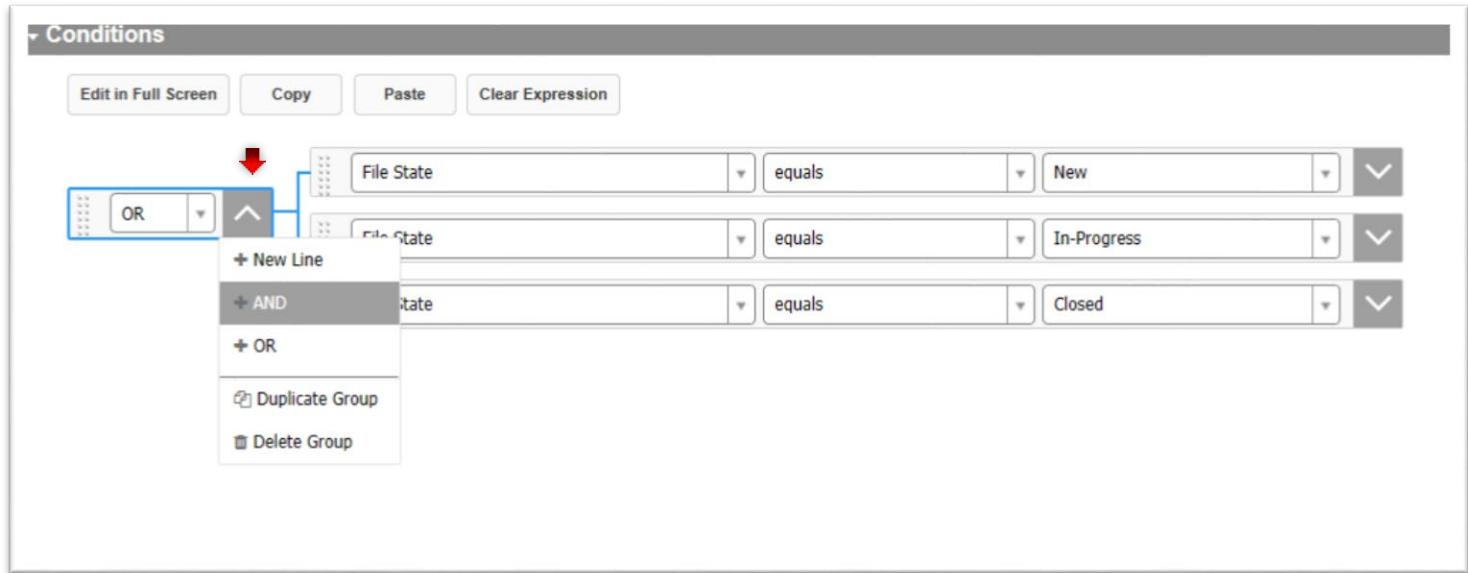
OR AND

File State equals New
 File State equals In-Progress
 File State equals Closed

Now we want to condition the report to show that we are only going to be searching for files that are falls. If you do not condition it to state only falls, it will pull data for ALL types of events (falls, skins, med error, etc.).

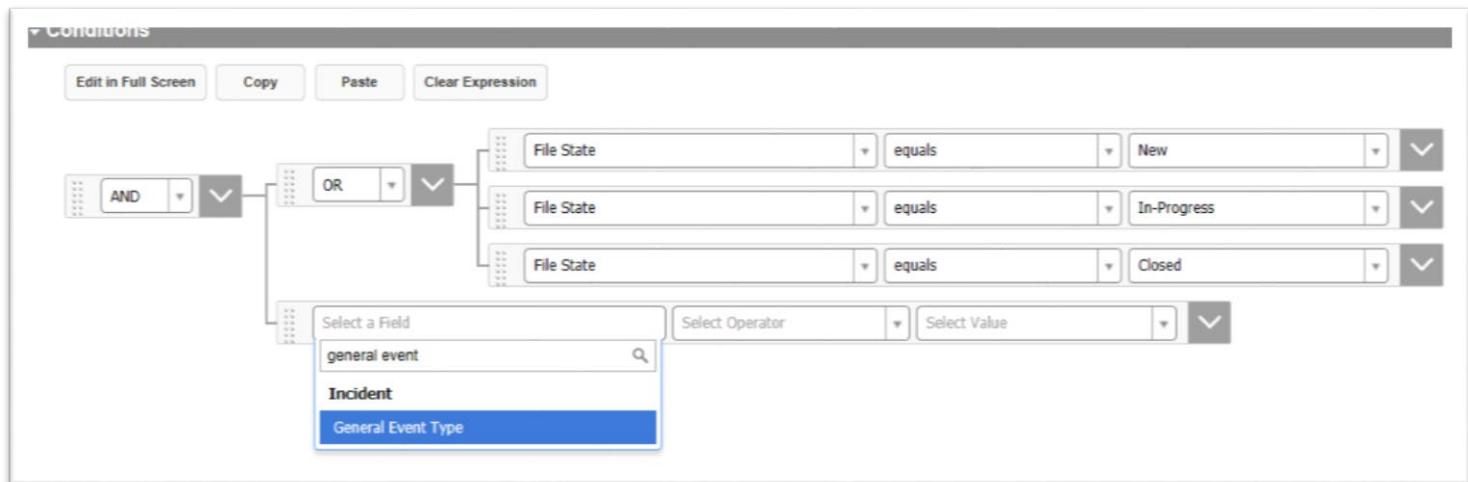
This is done using the term General Event Type. To add another condition, you must connect the new condition to the existing entire group of File State conditions.

To add a condition, click on the upwards arrow next to the OR connector and select AND.



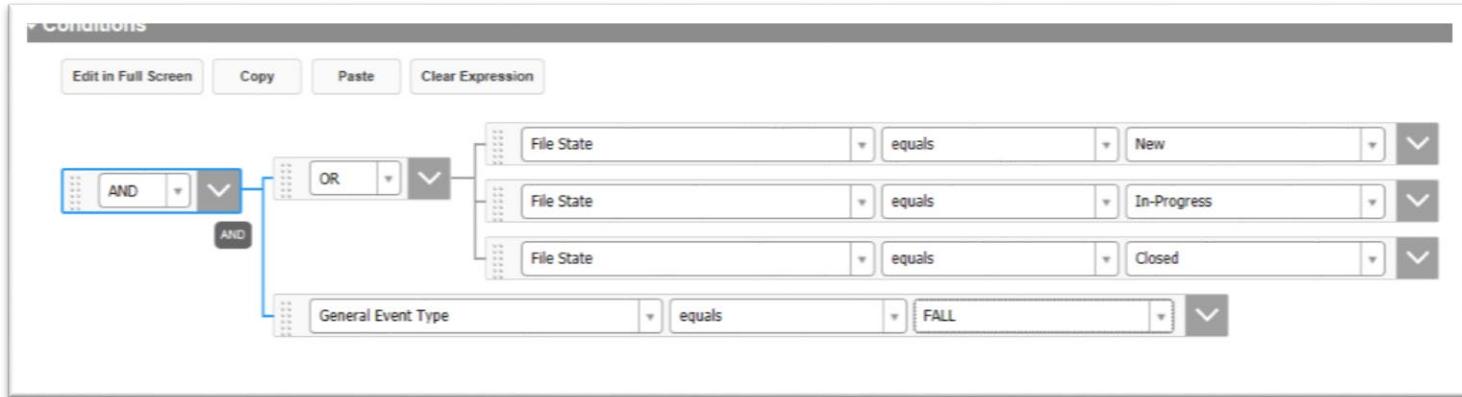
The screenshot shows the 'Conditions' editor interface. At the top, there are buttons for 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression'. Below these are three conditions defined under an 'OR' connector. The first condition is 'File State equals New'. The second condition is 'File State equals In-Progress'. The third condition is 'File State equals Closed'. A red arrow points to the upward arrow icon next to the 'OR' connector, indicating where to click to change the connector type.

In the 'Select a Field' box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.



The screenshot shows the 'Conditions' editor interface. At the top, there are buttons for 'Edit in Full Screen', 'Copy', 'Paste', and 'Clear Expression'. Below these are three conditions defined under an 'OR' connector. The first condition is 'File State equals New'. The second condition is 'File State equals In-Progress'. The third condition is 'File State equals Closed'. Below the conditions, there is a search interface. A text input field contains 'general event'. A dropdown menu is open, showing a list of items. The item 'General Event Type' is highlighted with a blue background, indicating it has been selected.

Select 'Equals' in the Operator box. The Value you select should be FALSE.



This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL. Remember this trick: OR gives you more (this OR that OR the other thing); AND will band things together (show Falls AND the current level of care of Skilled Nursing, to show only falls for SNF since both conditions need to be met). Another example to help you understand: you cannot have a File State that is New AND In Progress AND Closed all at the same time, so this helps you to recognize why they are connected by the OR.

Now we need to add the last condition. The final condition will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care. Again, if we did not do this, then it would show all falls for all Levels of Care that we have scope to see. Remember that scope controls everything, so that if you ONLY have scope to see a certain Level of Care, such as Skilled Nursing, then you would not need to add this condition. But if your scope covers more than one Level of Care, then you would need to add in this condition.

To add this condition, select the upward carrot next to “FALL” and select ‘+ New Line’. This will add a new line at the same condition set as the General Event Type.

Conditions

File State equals New
File State equals In-Progress
File State equals Closed
General Event Type equals FALL

AND
OR
File State
File State
File State
General Event Type
equals
equals
equals
equals
FALL

↓
+ New Line
+ AND
+ OR
Duplicate Line
Delete Line

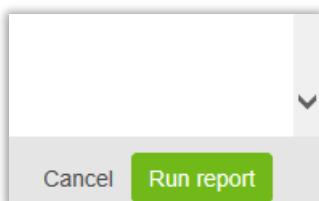
Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND are the General Event Type of FALL AND that happened to residents with the Current Level of Care is Skilled Nursing/Healthcare.

Conditions

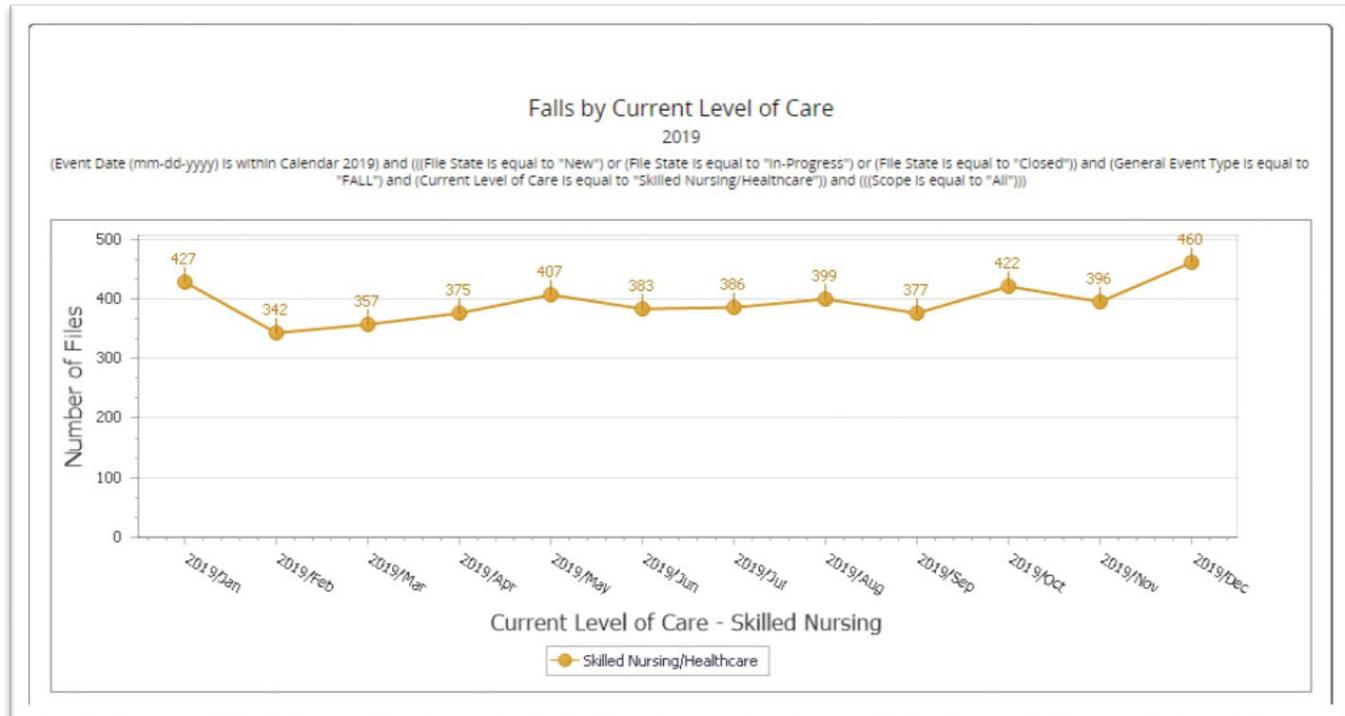
File State equals New
File State equals In-Progress
File State equals Closed
General Event Type equals FALL
Current Level of Care equals Skilled Nursing/Healthcare

AND
OR
File State
File State
File State
General Event Type
equals
equals
equals
equals
FALL
Current Level of Care
equals
Skilled Nursing/Healthcare

Now the report is ready to run. To run the report, click the green Run Report button at the bottom right of the screen.



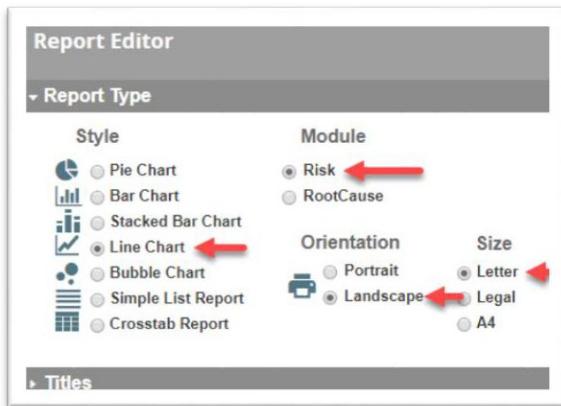
Here is a picture of the report with the legend visible:



Example 2: Trend Line chart for two Levels of care

Another example is creating a Line Chart with more than 1 line in the chart.

Create a Report to show a line graph that would track falls by year (say over a 5 year period) with more than 1 line: one line for Skilled Nursing Level of Care and one for Assisted Living Level of Care.



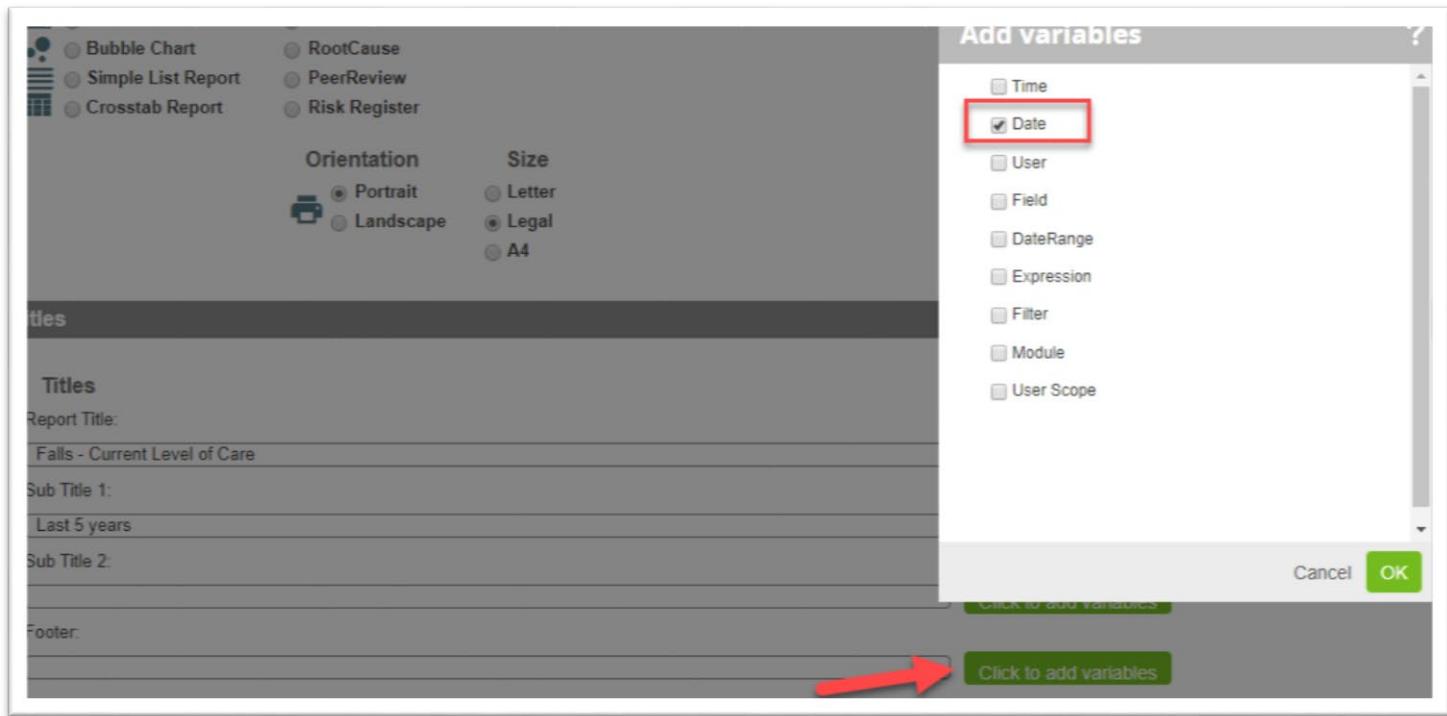
Just like the first example, select the Style as **Line Chart Report**, and the module as **Risk**.

Select the Orientation as **Landscape** and Size as **Letter**.

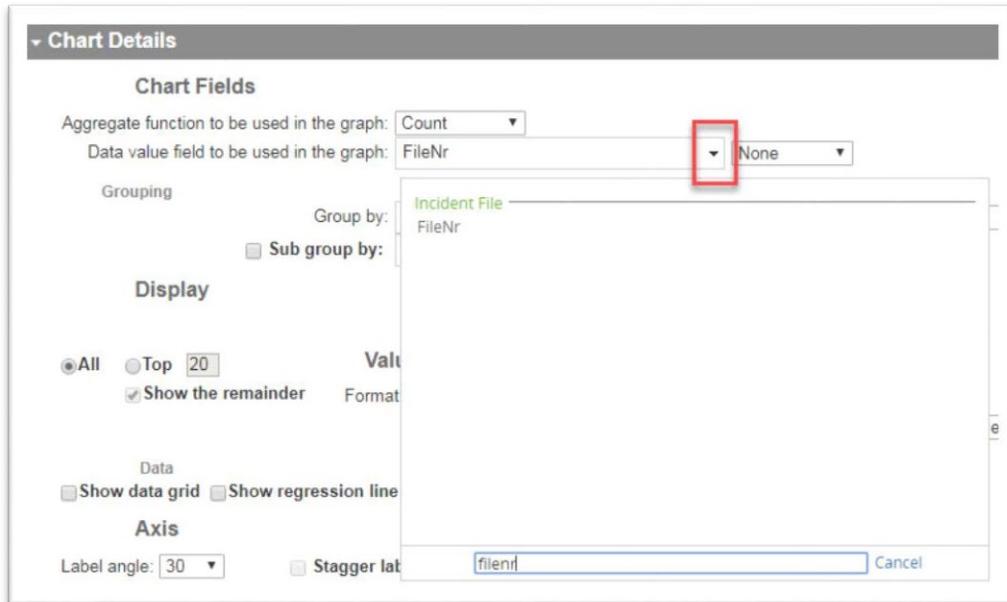
Next you will need to open the **Titles** section by clicking on the arrow next to the heading. Once open, you can type in the name of the report in the text boxes.

Report Title:	<input type="text" value="Falls - Current Level of Care"/>	Click to add variables
Sub Title 1:	<input type="text" value="Last 5 years"/>	Click to add variables
Sub Title 2:	<input type="text" value="({Filter})"/>	Click to add variables
Footer:	<input type="text"/>	Click to add variables

The Subtitles are available for additional text such as date ranges, Level of Care, etc. You can also add variables (self-populating choices that are updated every time you run the report). We recommend adding the Date variable in the Footer text box so that the run date is shown each time you run the report.



A Line Chart report can count the number of files in certain categories. In the first field function, select Count. The data field that you want to count in PEER is FileNR (these numbers are unique, so it allows the software to count the number of individual files in the groups you select).



Select FileNR by clicking the triangle/arrow in the Data value field (see above) and typing the name of the field that you want in the text field at the bottom of the drop down. Highlight and click the field and it will populate the field.

Now select the Grouping. For this report example, we want the report to trend over a period of time.

Chart Details

Chart Fields

Aggregate function to be used in the graph: **Count**

Data value field to be used in the graph: **FileNr**

Grouping

Group by: **Event Date (mm-dd-yyyy) - Trend Year**

Sub group by: **Current Level of Care**

Display

All Top **20**

Show the remainder

Values **Grand Total**

Format: **General**

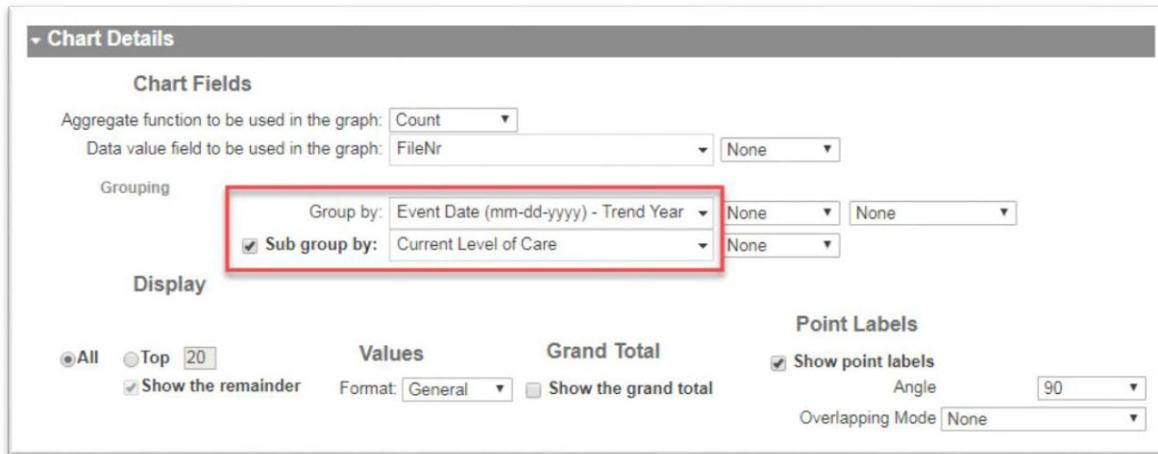
Show the grand total

Point Labels

Show point labels

Angle: **90**

Overlapping Mode: **None**



In the Group by: field, click the arrow and in the drop down box text field, start typing the grouping term you want to use. Click the term and it will populate in the field. In this report, we are grouping by *Event Date (mm-dd-yyyy) – Trend Year*. Other ideas for grouping include Entered Date trend fields.

At this stage, we would only see a count of the files by the year in the time period. To further be able to identify the Current Level of Care in the report, we will Sub group by Current Level of Care. Click the check box beside Sub group by: then the arrow beside it, search for and select the field Current Level of Care.

Chart Details

Chart Fields

Aggregate function to be used in the graph: **Count**

Data value field to be used in the graph: **FileNr**

Grouping

Group by: **Event Date (mm-dd-yyyy) - Trend Year**

Sub group by: **Current Level of Care**

Display

All Top **20**

Show the remainder

Values **Grand Total**

Format: **General**

Show the grand total

Point Labels

Show point labels

Angle: **90**

Overlapping Mode: **None**

Data

Show data grid Show regression line

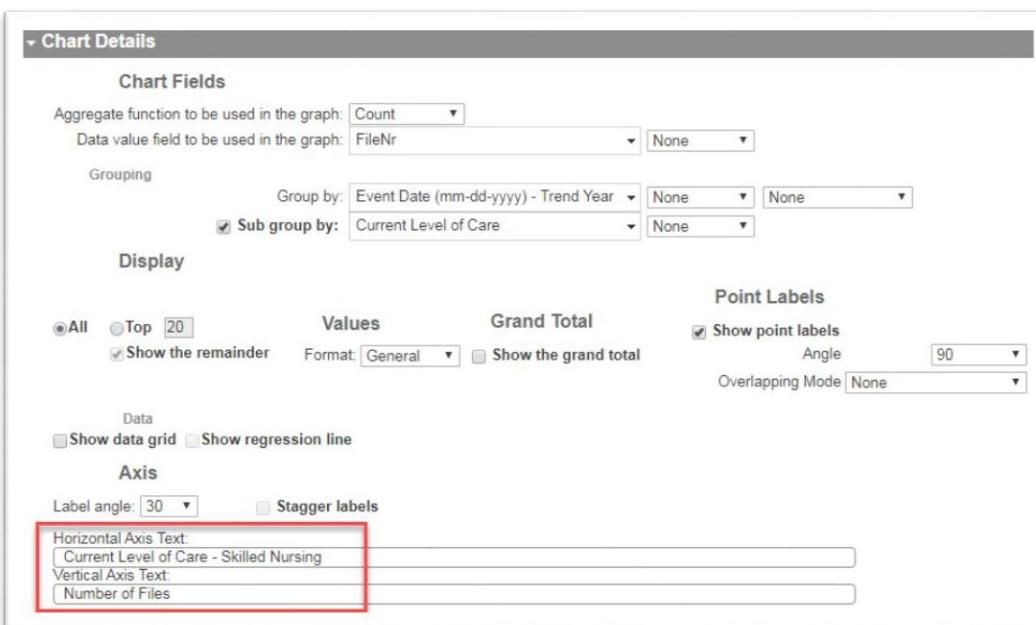
Axis

Label angle: **30**

Stagger labels

Horizontal Axis Text:
Current Level of Care - Skilled Nursing

Vertical Axis Text:
Number of Files



Add Horizontal and Vertical Axis Text so that it can display on the report. For this report, in the Horizontal Axis Text add *Current Level of Care – Skilled Nursing*. And for the Vertical add *Number of Files*.

The Display and Values data are usually not adjusted for this type of report.

Legend

Position

Click in the quadrant where you want the legend to appear.

Visibility **Values**

Format: General

Direction

The Legend is the last part of this section. You can adjust the position of the legend on the grid.

If the legend is visible, you can move it by clicking a box on the grid and the legend will move to that box.

If you do not wish the legend to be visible, simply uncheck the box.

Now open the **Date Range** section by clicking the triangle next to the title. This is where you set your date range for the report.

Date Range

Please select the relevant time period:

For: Event Date (mm-dd-yyyy) in:

Today
 This week
 This month
 This calendar quarter
 This fiscal quarter
 This calendar year
 This calendar year to date
 This fiscal year
 This fiscal year to date
 Custom

Yesterday
 Last week
 Last month
 Last calendar quarter
 Last fiscal quarter
 Last calendar year
 Last fiscal year

Last Calendar Years

From: to:

Select the Date Range you want the report to reference. You can select the Date Range by using one of the available terms such as Last 5 Calendar Years.

The final section to complete is **Conditions**. This is where you select the conditions that you want in the report. For this Line Chart, we want to “condition” the File State, General Event Type and Current Level of Care so that we narrow down the results to only show what we need. Selecting and connecting conditions can be tricky and may take a couple of tries until you get the right conditions set.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed.

Conditions

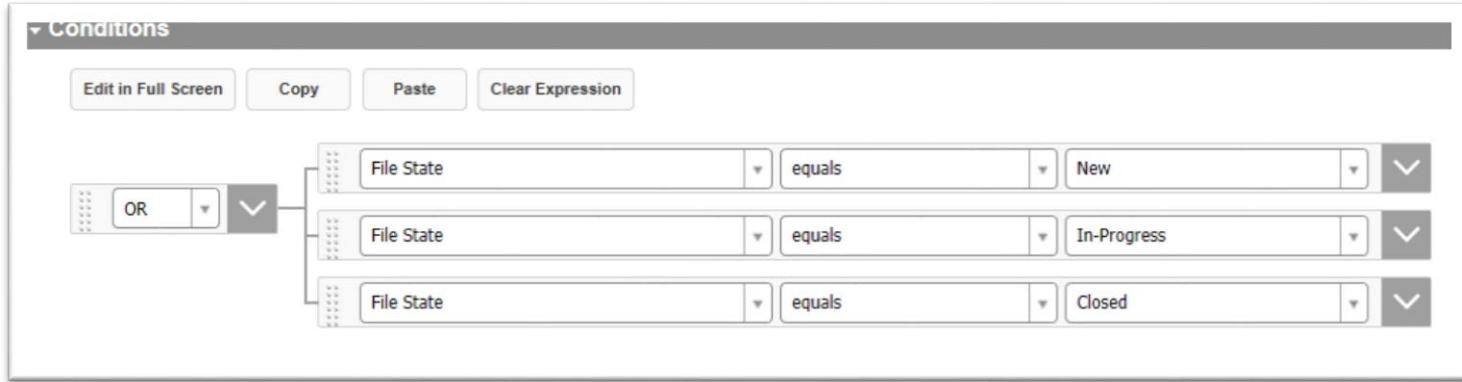
Edit in Full Screen Copy Paste Clear Expression

OR

File State equals New

File State equals In-Progress

File State equals Closed



Now we want to condition the report to show that we are only going to be searching for files that are Falls. This is done through the term General Event Type. To add another condition, you must connect the new condition to the existing entire group of File State conditions.

To add a condition, click on the upwards arrow next to the OR connector and select AND.

Conditions

Edit in Full Screen Copy Paste Clear Expression

OR

File State equals New

File State equals In-Progress

File State equals Closed

Upwards arrow pointing to the OR connector

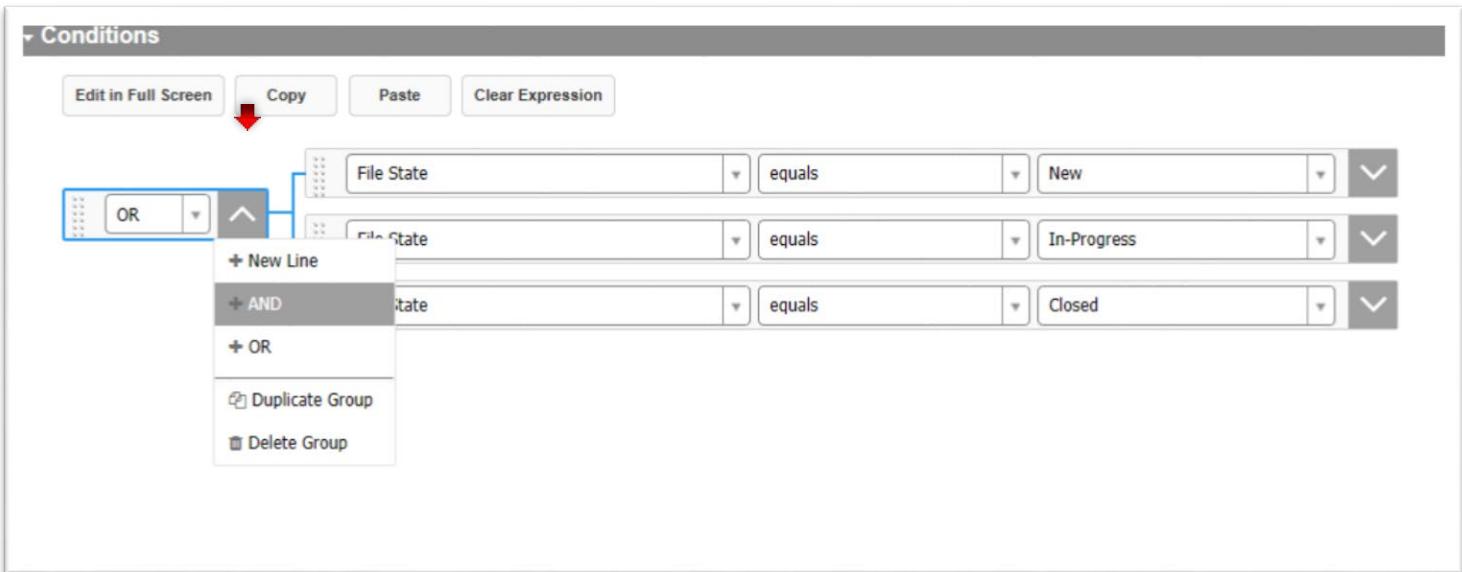
+ New Line

+ AND

+ OR

Duplicate Group

Delete Group



In the 'Select a Field' box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.

Conditions

File State equals New
File State equals In-Progress
File State equals Closed

Select a Field: general event
Select Operator: equals
Select Value: FALL

Select 'Equals' in the Operator box. The Value you select should be FALL.

Conditions

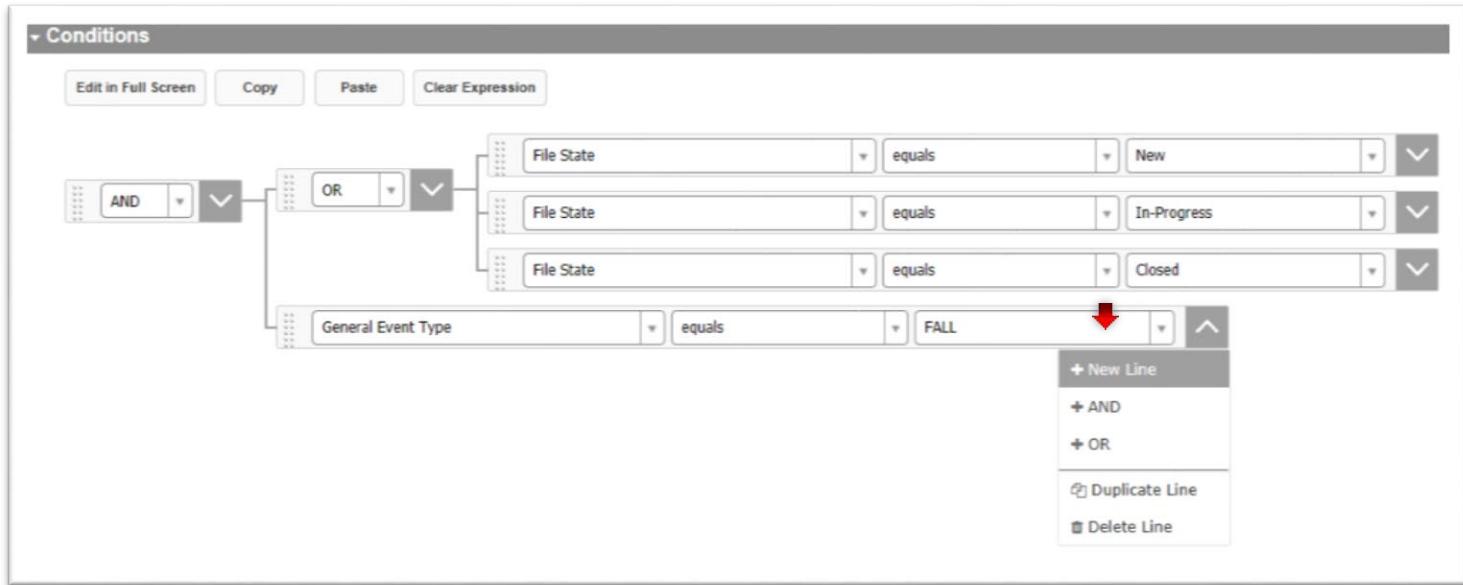
File State equals New
File State equals In-Progress
File State equals Closed

General Event Type equals FALL

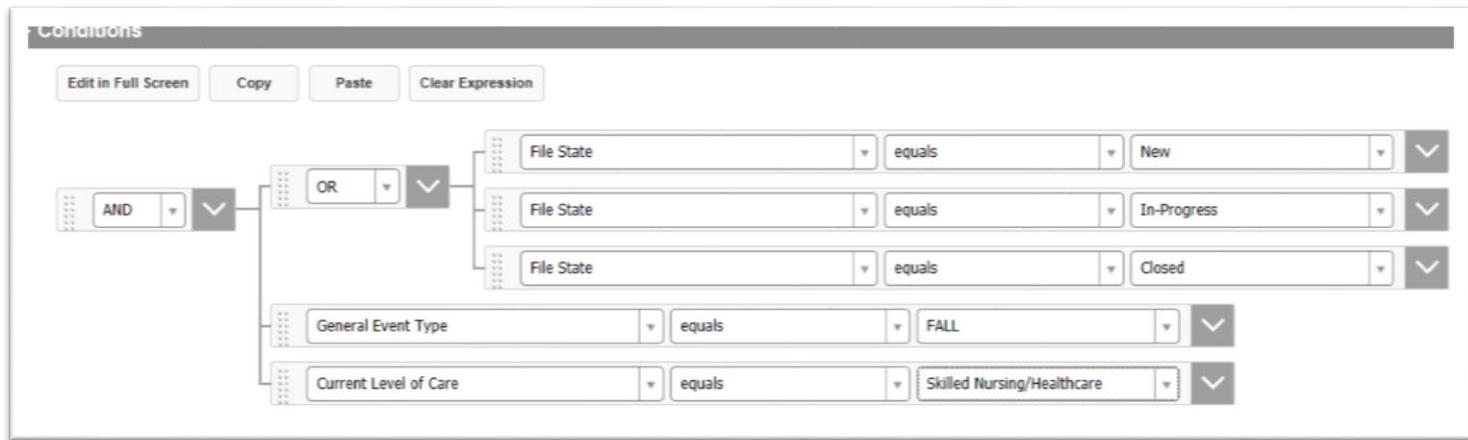
This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

Now we need to add one more condition. This will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care.

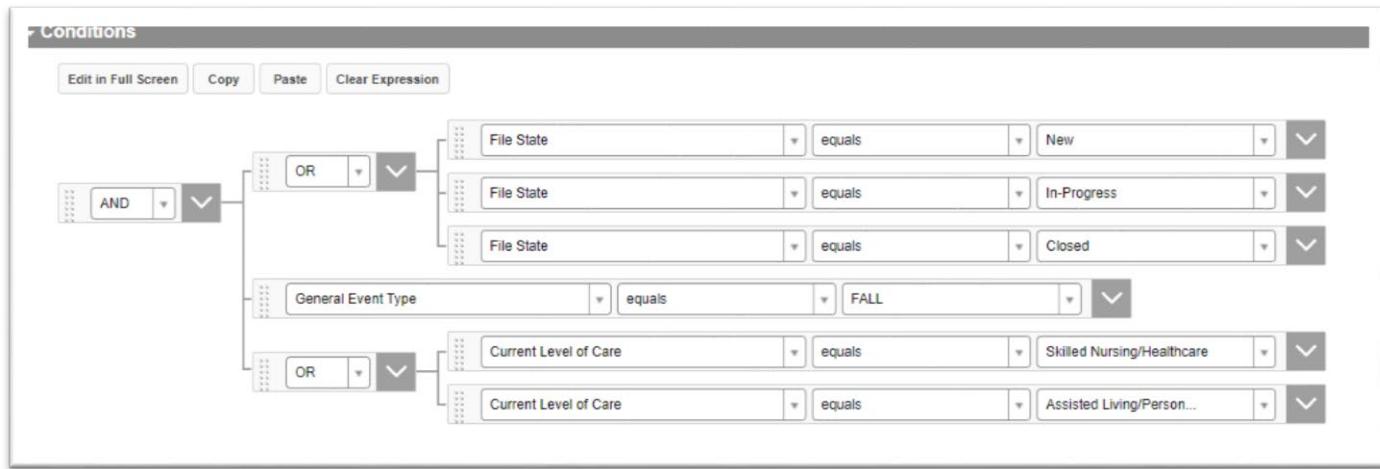
To add this condition, select the upward arrow next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.



Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL AND that happened to residents with the Current Level of Care of Skilled Nursing/Healthcare.



Finally, add another Current Level of Care (ex. Skilled Nursing/Healthcare) to the conditions using the OR connector so that we are able to see results for more than one specified Level of Care (remember OR gives you more!). To do so, click on the upward arrow next to "Skilled Nursing" and select '+OR'. Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Assisted Living/Personal Care.

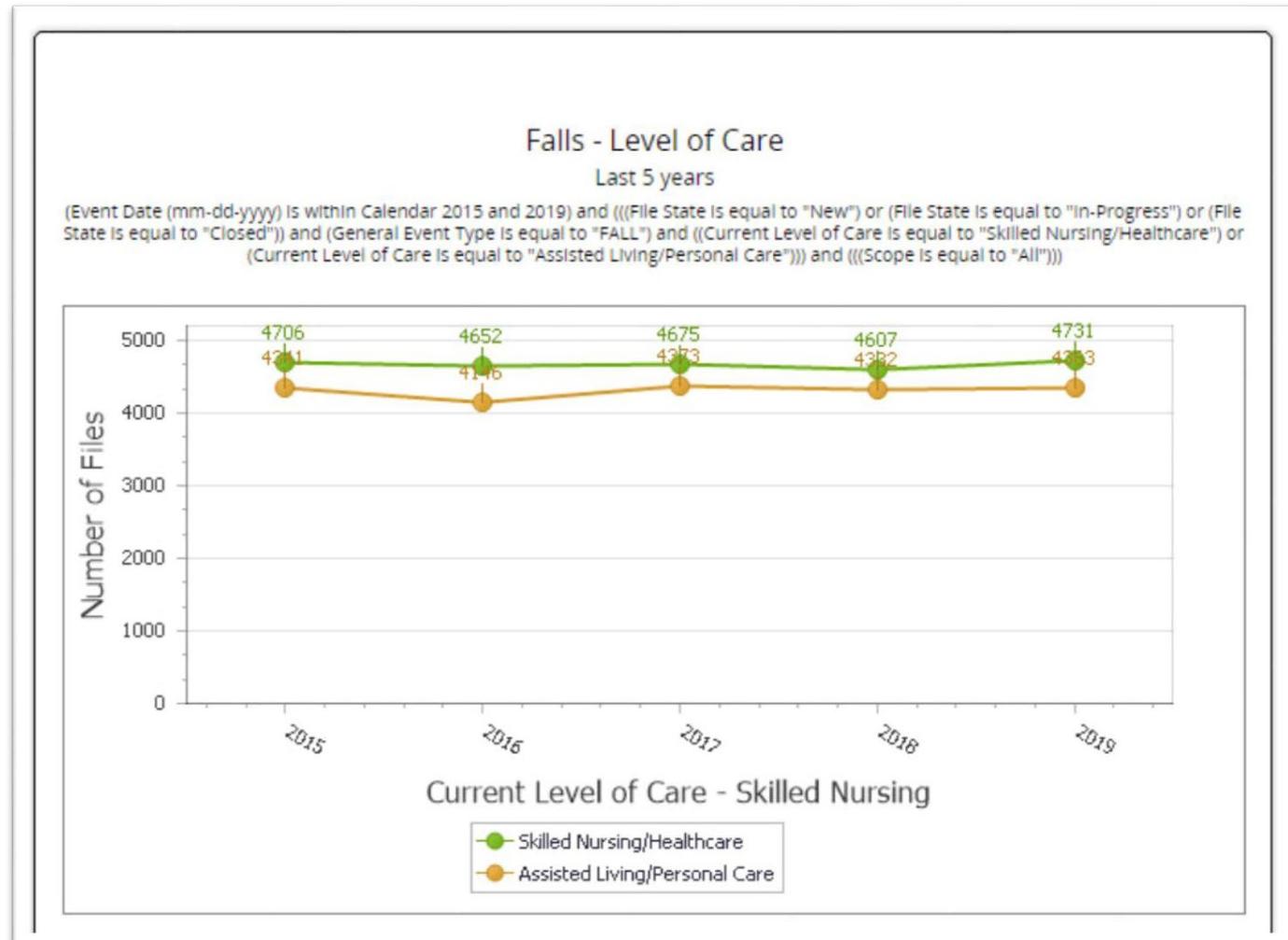


Now the report is ready to run. To run the report, click the green Run Report button at the bottom right.

Cancel

Run report

Here is what the Report looks like:

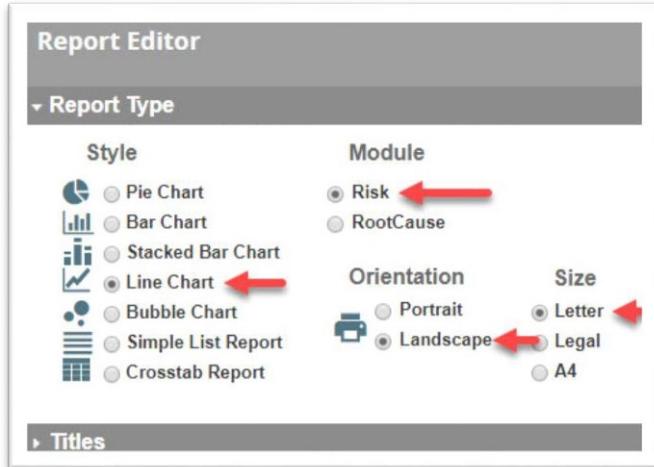


Creating a Bar Graph Report

Bar Graph Report - 2 Hour Time Block

Our next example is a time block report that would show falls for a specific Level of Care (Skilled Nursing) for a General Event Type in 2 hour time blocks for a period of time (say a quarter).

Click on the **Create** button from the Report Center. Select the Report Style as Bar Chart and Orientation as Landscape. Pick the Size as Letter if you plan to print this out or else you can select Legal if you want more real estate. Select “Risk” from the module section.



Provide a Report **Title**. You can add the DateRange as a Sub-title 1.

Report Title:	Falls by 2-hr Time Block - Skilled Nursing	Click to add variables
Sub Title 1:	{DateRange}	Click to add variables
Sub Title 2:		Click to add variables
Footer:		Click to add variables

Go to the **Chart Details** area:

In the first field function, select Count. The data field that you want to count in PEER is FileNR.

In the Group By: field select **Calc Event Time – Aggregate**.

Chart Details

Chart Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the graph: FileNr

Grouping

Group by: Calc Event Time - Aggregate

Sub group by: Incident, Calc Event Day of Week, Calc Event Time - Aggregate

Display

All Top 20 Show the remainder

Value Format

Data

Show data grid Show regression line

Axis

Label angle: 30 Stagger labels

Horizontal Axis Text: Time Blocks

Vertical Axis Text: calc event

Cancel

Check the **Apply aggregation** box to be able to configure the aggregation blocks and click on **Modify**.

Grouping

Group by: Calc Event Time - Aggregate

Sub group by: None

Apply aggregation: Points: Not configured

Modify

Start with 0 and keep increasing the number by 200 to configure 2 hour time blocks. This could be increments of 400 for 4 hour time blocks. The number signify time in the military time format.

Aggregation

Aggregation ranges:

New: 0 Add Aggregation not defined.

Aggregation

Aggregation ranges:

New: 200 Add

Min t

Aggregation

Aggregation ranges:

New: 400 Add

Min to 0 Delete
1 to 200 Delete
201 to Max Delete

Aggregation

Aggregation ranges:

New: Add

Min to 0	<input type="button" value="Delete"/>
1 to 200	<input type="button" value="Delete"/>
201 to 400	<input type="button" value="Delete"/>
401 to 600	<input type="button" value="Delete"/>
601 to 800	<input type="button" value="Delete"/>
801 to 1000	<input type="button" value="Delete"/>
1001 to 1200	<input type="button" value="Delete"/>
1201 to 1400	<input type="button" value="Delete"/>
1401 to 1600	<input type="button" value="Delete"/>
1601 to 1800	<input type="button" value="Delete"/>
1801 to 2000	<input type="button" value="Delete"/>
2001 to 2200	<input type="button" value="Delete"/>
2201 to Max	<input type="button" value="Delete"/>

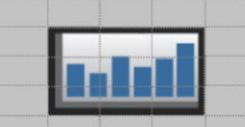
Add in increments of 200 till 2200 as the max is 2400.
Click OK.

Horizontal Axis Text: Time Blocks

Vertical Axis Text:

Enable y-axis scale breaks

Legend

Position Click in the quadrant where you want the legend to appear.	Visibility <input checked="" type="checkbox"/> Visible	Values Format: General
	Direction Top to Bottom	

Add the Horizontal Axis Text:
Time Blocks.

This type of Report does not
need a Legend, so keep the
visibility unchecked.

Next step is to add a **Date Range**:

Date Range

Please select the relevant time period:

All dates

For: Event Date (mm-dd-yyyy) From: to:

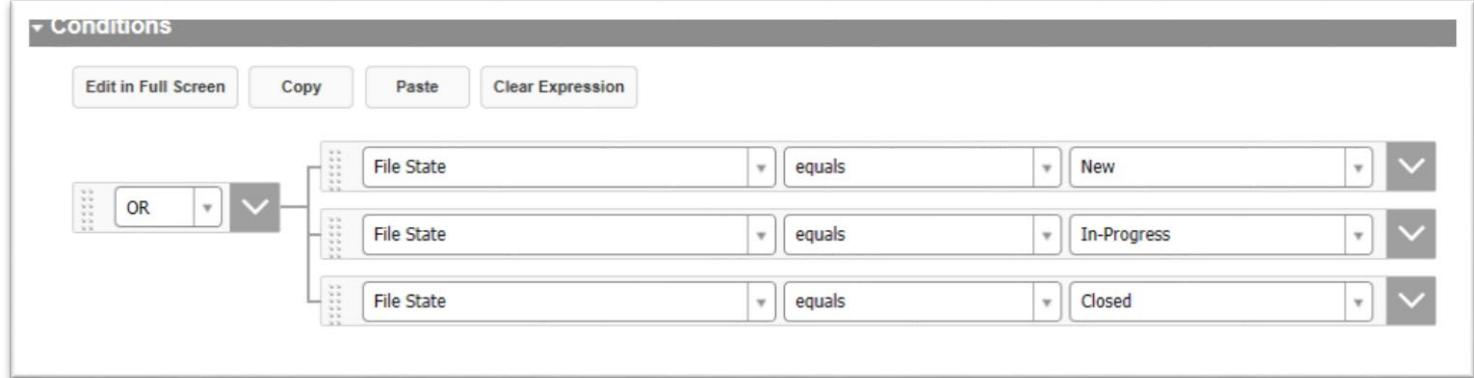
<input type="radio"/> Today	<input type="radio"/> Yesterday
<input type="radio"/> This week	<input type="radio"/> Last week
<input type="radio"/> This month	<input type="radio"/> Last month
<input type="radio"/> This calendar quarter	<input checked="" type="radio"/> Last calendar quarter
<input type="radio"/> This fiscal quarter	<input type="radio"/> Last fiscal quarter
<input type="radio"/> This calendar year	<input type="radio"/> Last calendar year
<input type="radio"/> This fiscal year	<input type="radio"/> Last fiscal year
<input type="radio"/> Custom	<input type="radio"/> Last <input type="text"/>

Select Event Date (mm-dd-yyyy) from the drop-down and select Last calendar quarter.

Next step is to add the **Conditions**. For this Line Chart, we want to “condition” the File State, General Event Type and Current Level of Care so that we narrow down the results to only show what we need.

We need to include only Fall events so the expression should read General Event Type = FALL
And we only include Current Level of Care of Skilled Nursing/HealthCare so the expression should read Current Level of Care = Skilled Nursing/Healthcare. Connect the 2 expressions with AND connector.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed.

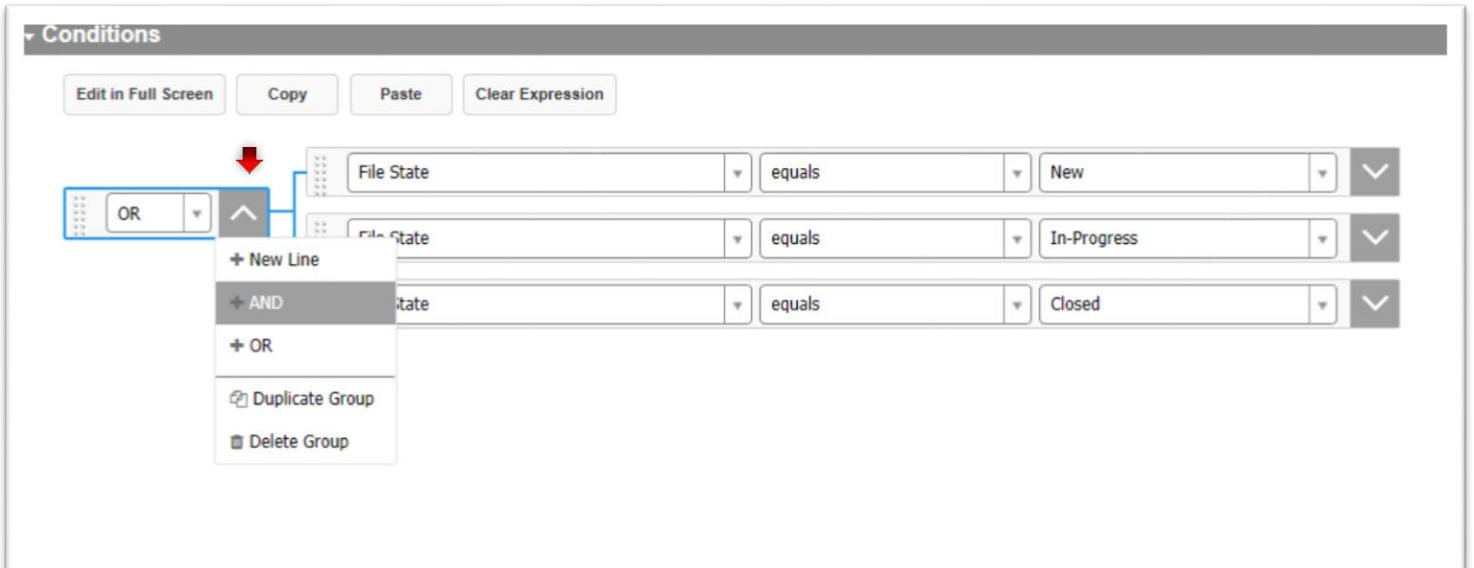


The screenshot shows the 'Conditions' editor with an OR group containing three File State conditions: New, In-Progress, and Closed.

```
graph TD; OR1[OR] --> FS1[File State]; OR1 --> FS2[File State]; OR1 --> FS3[File State]; FS1 --> C1["equals New"]; FS2 --> C2["equals In-Progress"]; FS3 --> C3["equals Closed"]
```

Now we want to condition the report to show that we are only going to be searching for files that are Falls. This is done through the term General Event Type. To add another condition, you must connect the new condition to the existing entire group of File State conditions.

To add a condition, click on the upwards arrow next to the OR connector and select AND.



The screenshot shows the 'Conditions' editor with an OR group. A context menu is open next to the OR connector, with the 'AND' option highlighted. The menu also includes options for 'New Line', 'OR', 'Duplicate Group', and 'Delete Group'.

```
graph TD; OR1[OR] --> AND[AND]; OR1 --> FS1[File State]; OR1 --> FS2[File State]; OR1 --> FS3[File State]; AND --> C1["equals New"]; AND --> C2["equals In-Progress"]; AND --> C3["equals Closed"]
```

In the ‘Select a Field’ box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.

Conditions

File State equals New
File State equals In-Progress
File State equals Closed

Select a Field: general event
Select Operator: equals
Select Value: FALL

Select 'Equals' in the Operator box. The Value you select should be FALL.

Conditions

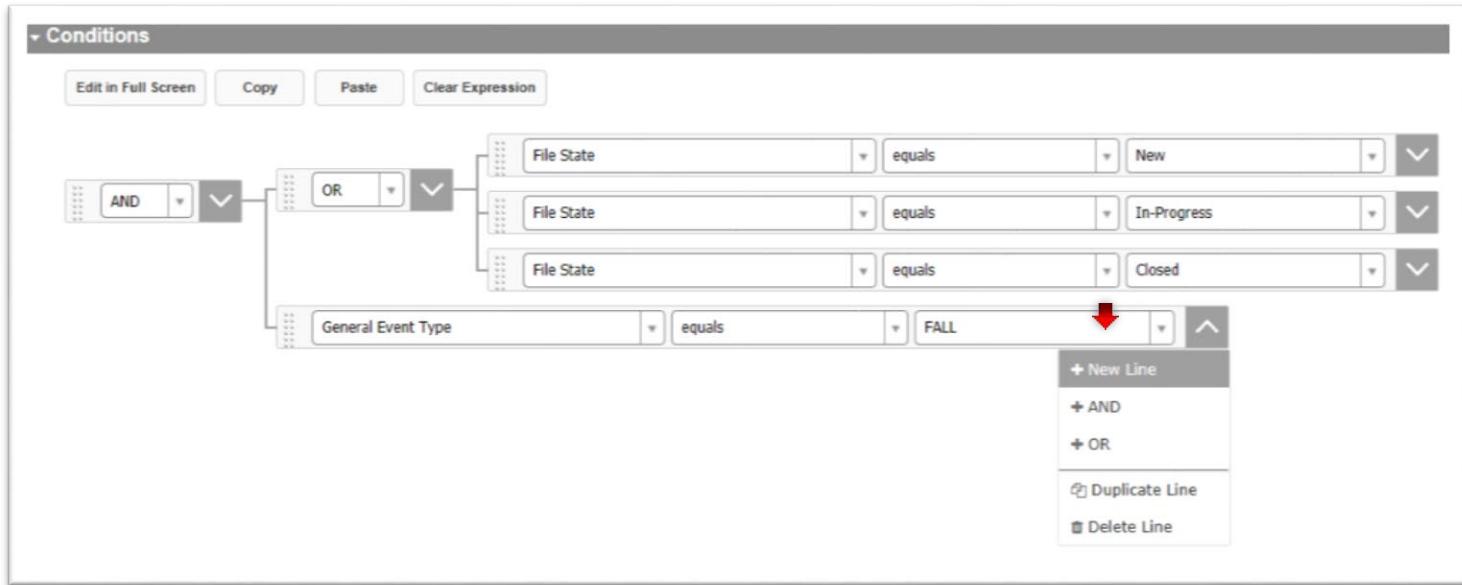
File State equals New
File State equals In-Progress
File State equals Closed

General Event Type equals FALL

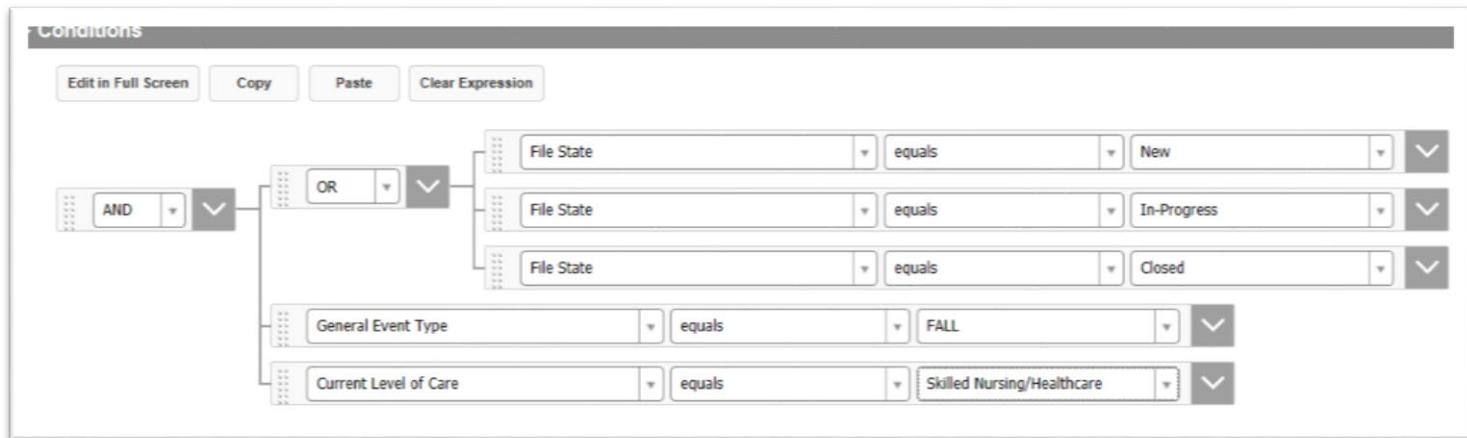
This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

Now we need to add the last condition. The final condition will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care.

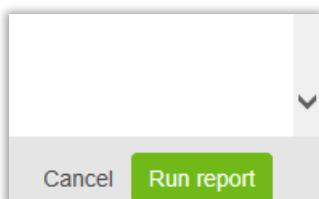
To add this condition, select the upward arrow next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.



Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL AND that happened to residents with the Current Level of Care of Skilled Nursing/Healthcare.



Now the report is ready to run. To run the report, click the green Run Report button at the bottom right.

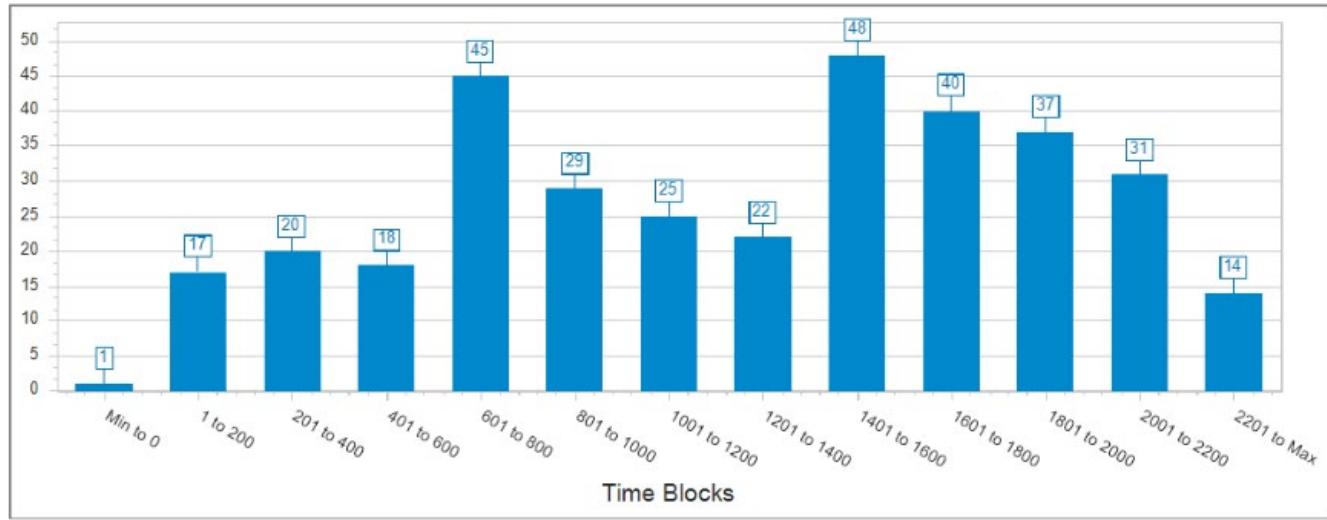


Here is what the Report will look like:

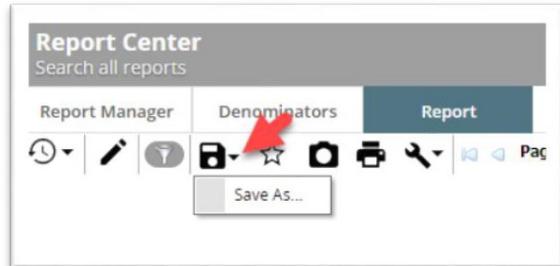
Falls by 2-hr Time Block - Skilled Nursing

Event Date (mm-dd-yyyy) is within Calendar 2024 Q1

(Event Date (mm-dd-yyyy) is within Calendar 2024 Q1) and (((File State is equal to "New") or (File State is equal to "In-Progress") or (File State is equal to "Closed")) and (General Event Type is equal to "FALL") and (Current Level of Care is equal to "Skilled Nursing/Healthcare")) and (((Scope is equal to "All"))))



Use the Floppy Disk icon to Save the Report in a Public or Private folder.

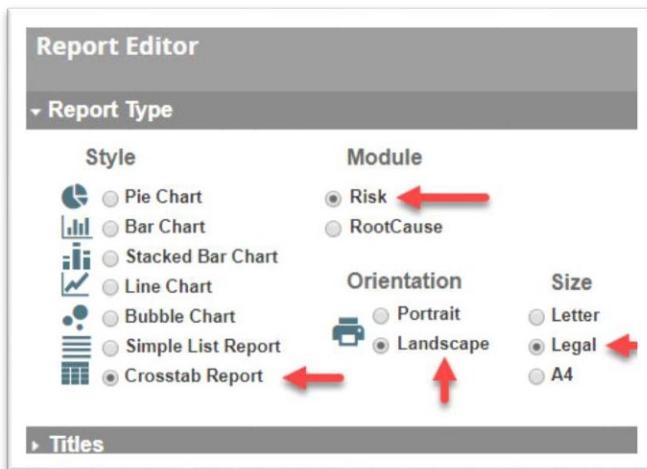


Creating a Cross tab Report

Crosstab Report for Falls by Resident Name

This Report is a Cross tab report that will show Fall events for a specific Level of Care (Skilled Nursing) trending across the year by Specific Event Type grouped by Resident Name.

From the Report Center access the Report Manager tab and click on Create to create a Report Editor report.



In the Report Editor → Report Type Style select Crosstab report and select the Orientation as Landscape. For this example, we can set the Size to Legal.

Under **Titles** section add a Report Title and Sub Title:

Report Title:	Specific Fall Events Types - Skilled Nursing	Click to add variables
Sub Title 1:	Resident's Name	Click to add variables
Sub Title 2:	{Filter}	Click to add variables
Footer:		Click to add variables

The next step is to add details to the **CrossTab Details** section.

CrossTab Details

CrossTab Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the CrossTab: FileNr

Row Grouping

Group by: Incident File

Sub group by: FileNr

Column Grouping

Group by:

Date Range

Conditions

filenr Cancel

In the first field function, select Count. The data field that you want to count in PEER is FileNR.

Under the Row Grouping heading, for Group by:, click on the down arrow to find and select the term Specific Event Type. Check on the box beside Sub group by: and click on the down arrow to search for the field that represents the Resident's Name. There are many name fields available to select from – this one is found under the green Person Affected heading and is the first field with the label 'Name'.

CrossTab Details

CrossTab Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the CrossTab: FileNr

Row Grouping

Group by: Specific Event Type

Sub group by: Name

Column Grouping

Group by: Name

Group width: Notifications

Date Range

Please select the relevant time period:

All dates

For: Event Date (mm-dd-yyyy)

Today

This week

This month

filenr Cancel

Under the Column Grouping heading, for the Group By:, find and select the Event Date (mm-dd-yyyy) – Trend Month Name field.

CrossTab Details

CrossTab Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the CrossTab: FileNr

Row Grouping

Group by: Specific Event Type

Sub group by: Name

Group width: 100 pixels Sub group width: 100 pixels

Column Grouping

Group by: Event Date (mm-dd-yyyy) - Trend Month

Width: Event Date - Trend Month

Event Date - Trend Month

Event Date - Trend Quarter

Event Date - Trend Quarter

Event Date - Trend Week

Event Date - Trend Year

Event Date (mm-dd-yyyy)

Event Date (mm-dd-yyyy) - Trend Day Of Week

Event Date (mm-dd-yyyy) - Trend Fiscal Year Month

Event Date (mm-dd-yyyy) - Trend Fiscal Year Quarter

Event Date (mm-dd-yyyy) - Trend Month Name

Event Date (mm-dd-yyyy) - Trend Month Name Year

Event Date (mm-dd-yyyy) - Trend Year Month Name

Event Date (mm-dd-yyyy) - Trend Year Week

Please select the relevant time period:

All dates

For: Event Date (mm-dd-yyyy)

Today

This week

This month

This calendar quarter

This fiscal quarter

This calendar year

This fiscal year

event date Cancel

Row and Column Group widths can be adjusted as per the length of the captions if any of the values are being cut off in the report. 100 pixels is the default. We have increased it to 150 for the Row Group and Sub-Group and 60 for the Column Group.

CrossTab Details

CrossTab Fields

Aggregate function to be used in the graph: Count

Data value field to be used in the CrossTab: FileNr

Row Grouping

Group by: Specific Event Type

Sub group by: Name

Group width: 150 pixels Sub group width: 150 pixels

Column Grouping

Group by: Event Date (mm-dd-yyyy) - Trend Month

Width: 60 pixels

Now open the **Date Range** section by clicking the triangle next to the title. This is where you set your date range for the report.

Date Range

Please select the relevant time period:

For: in:

Today Yesterday
 This week Last week
 This month Last month
 This calendar quarter Last calendar quarter
 This fiscal quarter Last fiscal quarter
 This calendar year Last calendar year
 This calendar year to date Last fiscal year
 This fiscal year Last
 This fiscal year to date
 Custom

From: to:

Now you select the Date Range you want the report to reference. You can select the Date Range by using one of the available terms such as Last calendar year.

The next step is to add the **Conditions**.

The Conditions section will default with a File State criteria to report on files that are New, In-Progress OR Closed. We want to add in the conditions to say we only want to see Falls for Skilled Nursing.

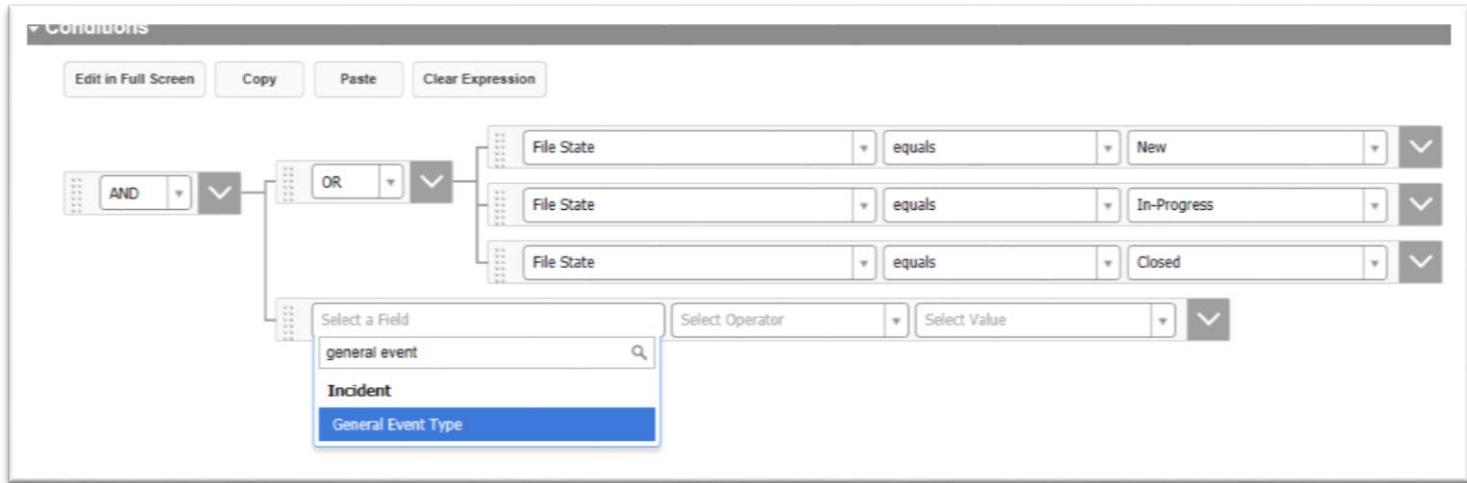
To add the first condition, click on the upwards arrow next to the OR connector and select AND.

Conditions

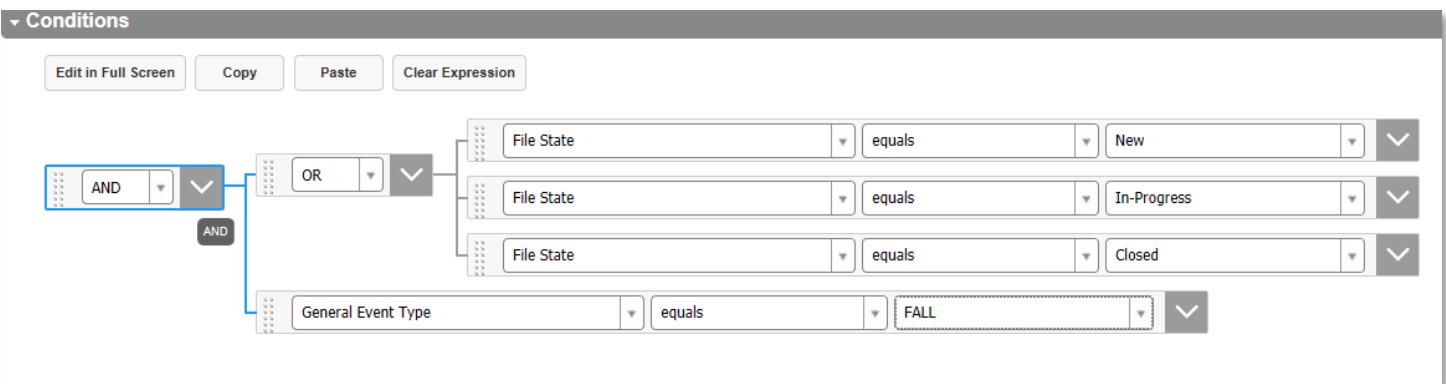
Edit in Full Screen

OR File State equals New
+ New Line File State equals In-Progress
+ AND File State equals Closed
+ OR
Duplicate Group Delete Group

In the 'Select a Field' box and in the drop down box text field, start typing the term that you want to find (General Event Type). Once you find it, highlight it and click it so that the term is in the Field box.



Select 'Equals' in the Operator box. The Value you select should be FALL.



This condition set is done once you have the correct information in the Field, Operator and Value fields. This new condition states that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL.

Now we need to add the last condition. The final condition will tell the report that we only want valid files that were falls and that occurred within the Skilled Nursing/Healthcare Level of Care.

To add this condition, select the upward arrow next to "FALL" and select '+New Line'. This will add a new line at the same condition set as the General Event Type.

Conditions

File State equals New
File State equals In-Progress
File State equals Closed
General Event Type equals FALL

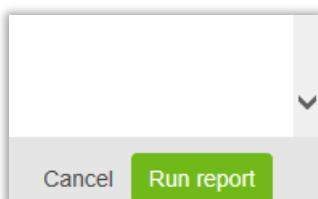
Actions: New Line, AND, OR, Duplicate Line, Delete Line

Now start typing Current Level of Care into the Select a Field box. The Operator is Equals. The Value is Skilled Nursing/Healthcare. This tells the conditions that you want files that are New, In-Progress or Closed AND that are the General Event Type of FALL AND that happened to residents with the Current Level of Care of Skilled Nursing/Healthcare.

Conditions

File State equals New
File State equals In-Progress
File State equals Closed
General Event Type equals FALL
Current Level of Care equals Skilled Nursing/Healthcare

Now the report is ready to run. To run the report, click the green Run Report button at the bottom right.



Here is what the Report will look like:

Specific Fall Events Types - Skilled Nursing														
Resident's Name														
(Event Date (mm-dd-yyyy) is within Calendar 2019) and ((File State is equal to "New") OR (File State is equal to "In-Progress") OR (File State is equal to "Closed")) and (General Event Type is equal to "FALL") and (Current Level of Care is equal to "Skilled Nursing/Healthcare") and ((Scope is equal to "All"))														
Event Date (mm-dd-yyyy) - Trend Month Name														
Specific Event Type	Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
		0	0	0					0	0	0	0		0
during transfer	JANE SMITH					1								1
from bed	ANNA SMITH												1	1
	DDGF DFE						1							1
from bed Total							1						1	2
from low bed	BARES TOM					1								1
	POOH WINNIE					1								1
	SMITH JOE						1							1
from low bed Total						2	1							3
from motor vehicle	WILMA FLINTSTONE					1								1
from toilet/commode	ANN SMITH					1								1
	BILLY JOEL					1								1
	HUYEDF HJHYTR					1								1
	JESSICA "JOE" SMITH							1						1
from toilet/commode Total						3		1						4
from wheelchair	EDWARD "JASON" SMITH										1			1
	JERRY ROLLINGS						1							1
from wheelchair Total							1				1			2
other	DONALD DUCK											1		1
	JAMES DOLE					1								1
other Total						1						1		2