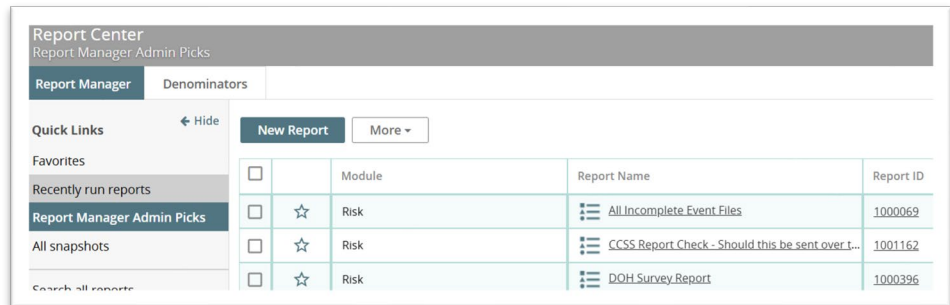# How to Create a Surveyor's Report
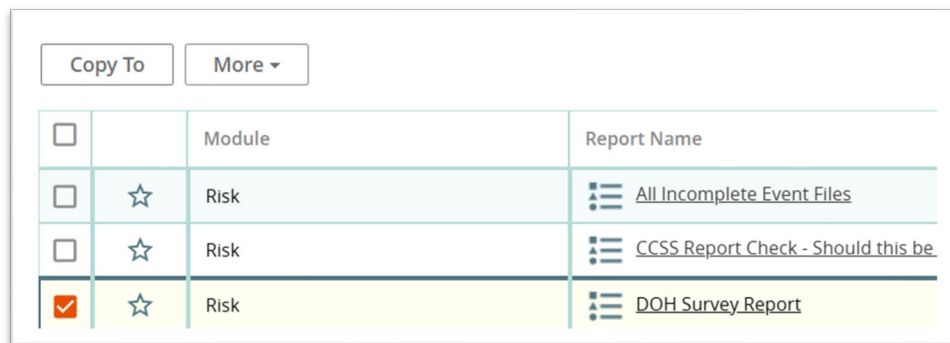
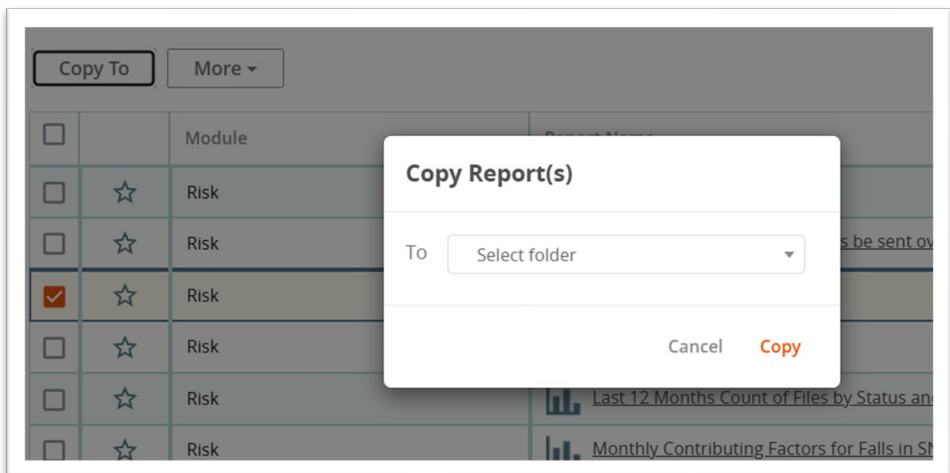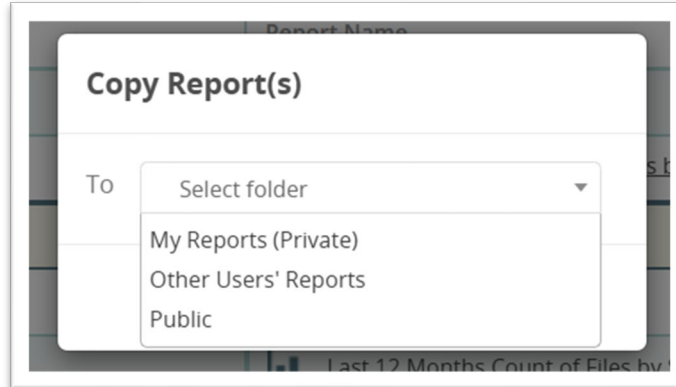|	
Step 1: Open the report center and click on "Report Manager Admin Picks" located in the "Quick Links" section	
Step 2: Locate the "DOH Survey Report" and click the box next to it to "select" it. You will now see the "Copy to" and "More" boxes appear.	
Step 3: Click on the "Copy To" Button which will bring up the pop-up dialog box seen below. Click on the arrow to the right of "Select folder" to display the folders.	
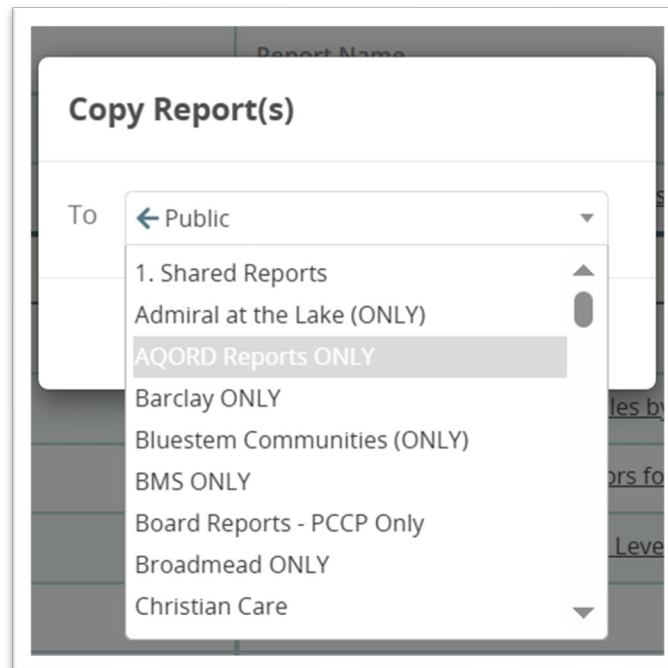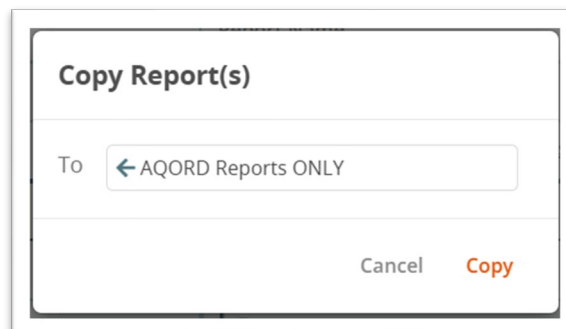
Step 4: Click on the "Public" option to bring up all the public folders. Note: You can also opt to save it your private report folder.	**Copy Report(s)** To Select folder ▼ My Reports (Private) Other Users' Reports Public
Step 5: Locate and select your organization's folder	**Copy Report(s)** To ← Public ▼ 1. Shared Reports Admiral at the Lake (ONLY) AQORD Reports ONLY Barclay ONLY Bluestem Communities (ONLY) BMS ONLY Board Reports - PCCP Only Broadmead ONLY Christian Care
Step 6: Click copy	**Copy Report(s)** To ← AQORD Reports ONLY Cancel Copy

Step 7: On the left side of the screen, locate the Folders section and click on the downward facing arrow to the left of the "Public" folder	**Report Center** Report Manager Admin Picks **Report Manager** Denominator **Quick Links** ← Hide Favorites Recently run reports **Report Manager Admin Picks** All snapshots Search all reports **Folders** Options ▾ ▸ 📁 My Reports (Private) ▸ 📁 Other Users' Reports ▸ 📁 Public ✏️
Step 8: With the folders expanded, scroll down to find your organization's report folder	**Folders** Options ▾ — Other Users' Reports ▾ 📁 Public ▸ 📁 1. Shared Reports 📁 Admiral at the Lak... 📁 AQORD Reports O... 📁 Barclay ONLY 📁 Bluestem Commu...
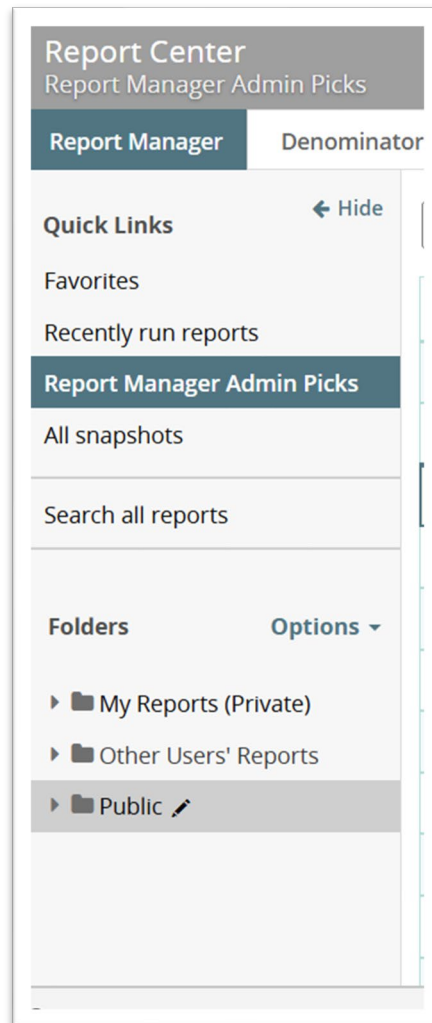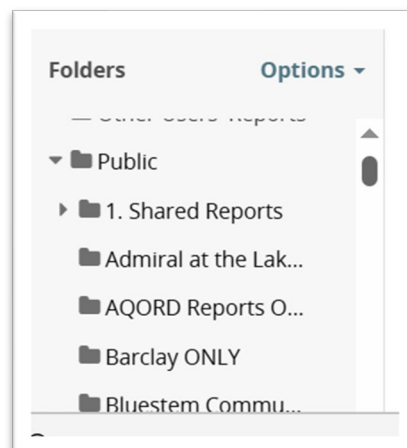
Step 9: From within your folder, locate the DOH Survey Report either by scrolling down or using the search bar on the right as seen below.	
Step 10: Click on the box to the left of the report to select it, which will result in the "Edit," "Delete," "Copy To," and "More" options to appear.	
This will open the Report Editor.	
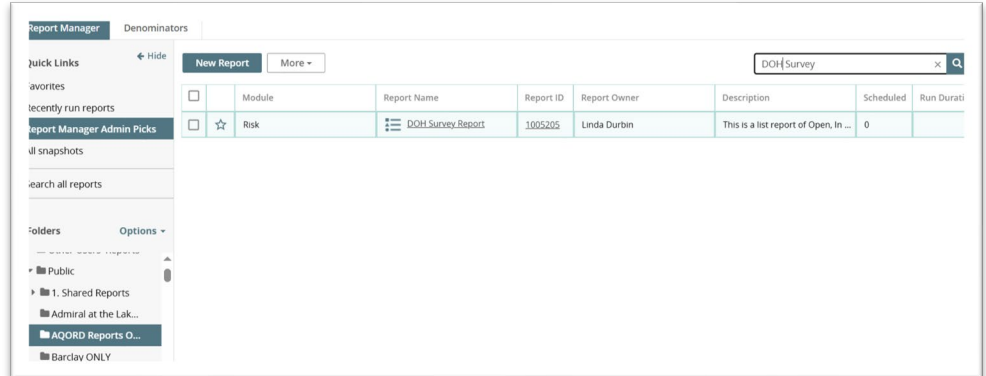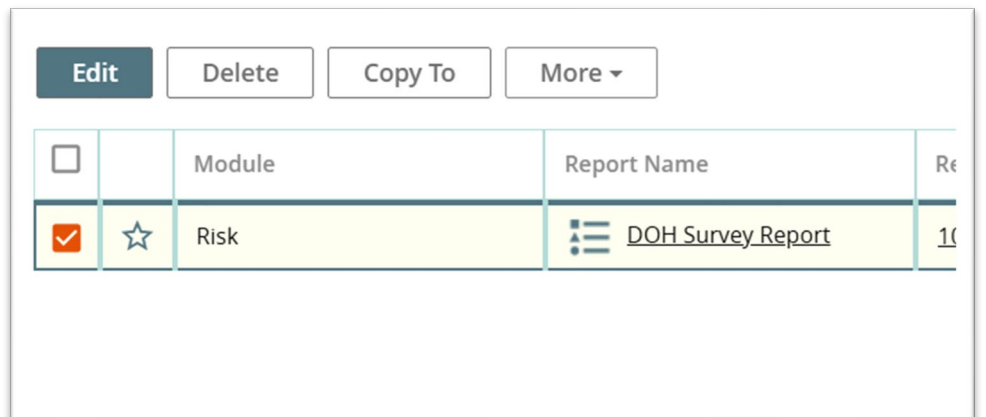
Step 11: Open the Title Section by clicking the arrow to the left of the word title and update the Title of your report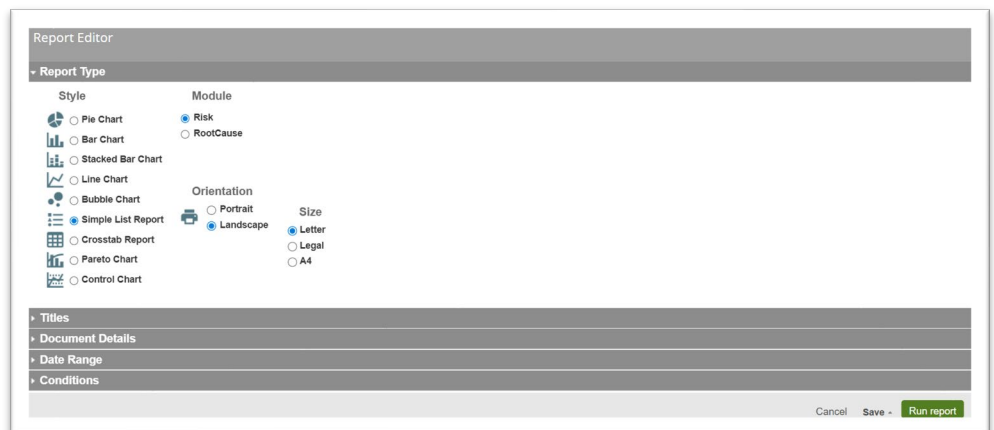. You can delete Sub Title 1. Sub Title 2 is a date range, that will show the dates the report is pulling from. This is typically good to have.

Titles

Titles

Report Title:
DOH Survey Report   [Click to add variables]

Sub Title 1:
Change Date Range to Survey Window!   [Click to add variables]

Sub Title 2:
{DateRange}   [Click to add variables]

Footer:
          [Click to add variables]

This is how the titles appear on the Report

DOH Survey Report
Change Date Range to Survey Window!
Event Date (mm-dd-yyyy) is within Calendar 2025

General Event Type
CARE/SERVICE COORDINATION

File ID	Event Date	Time of Event	Last Name	First Name	Specific Event Type	Reported Event Severity

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Step 12: Open the "Document Details" section. These are all the fields that will display on your report. You can add more by clicking on the "+" sign and searching for the fields (field names match the captions on the forms).

Document Details

Field Name	Function	Sort	Sort Sequence	Summary	Width	Label	Concatenate	Show all values	Display in line
General Event Type	None	None		None	1			☐	☐
File ID	None	Descending	Alphabetical	None	1				☐
Event Date (mm-dd-yyyy)	None	Ascending	Alphabetical	None	1				☐
Time of Event	None	None		None	1				☐
Last Name	None	Ascending	Alphabetical	None	1				☐
First Name	None	None		None	1				☐
Specific Event Type	None	None		None	2				☐
Reported Event Severity	None	None		None	2				☐

Display

Paging   Lines   Totals
☐ Page break by Group   ☑ Verticals   ☐ Show the grand total for unique: General Event Type
                          ☑ Horizontals   ☐ Show the page total for unique: General Event Type

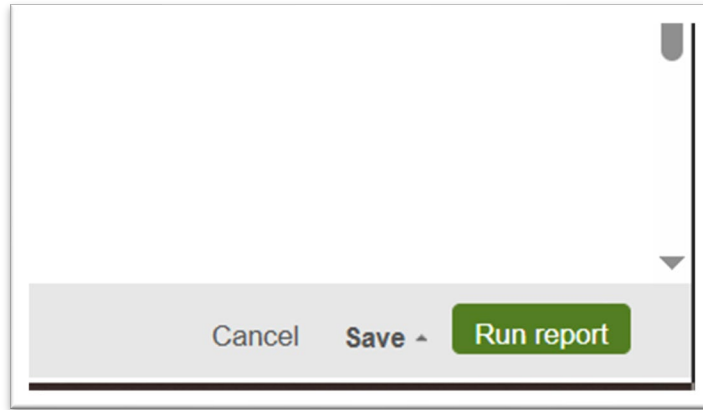|	
Step 13: Open the Date Range section, by default it is set to "This calendar year."	**Date Range** Please select the relevant time period: ○ All dates For: Event Date (mm-dd-yyyy) ▼ in: ○ Today ○ Yesterday ○ This week ○ Last week ○ This month ○ Last month ○ This calendar quarter ○ Last calendar quarter ○ 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: [ ] ▼
Step 14: If preferred, select the last option on the left "Custom" and select your start and end dates.	**Date Range** Please select the relevant time period: ○ All dates For: Event Date (mm-dd-yyyy) ▼ 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: 10-01-2025 ▼ to: 12-26-2025 ▼
Step 15: Open the "Conditions" section. This report is set to look for any files (new, in-progress, or closed) that are in "Skilled Nursing"	**Conditions** ☐ Include Duplicate Files Copy Paste Clear Expression Undo AND ▼ — OR ▼ — File State ▼ equals ▼ New ▼ ▼ File State ▼ equals ▼ In-Progress ▼ ▼ File State ▼ equals ▼ Closed ▼ ▼ Current Level of Care ▼ equals ▼ Skilled Nursing/Hea... ▼ ▼

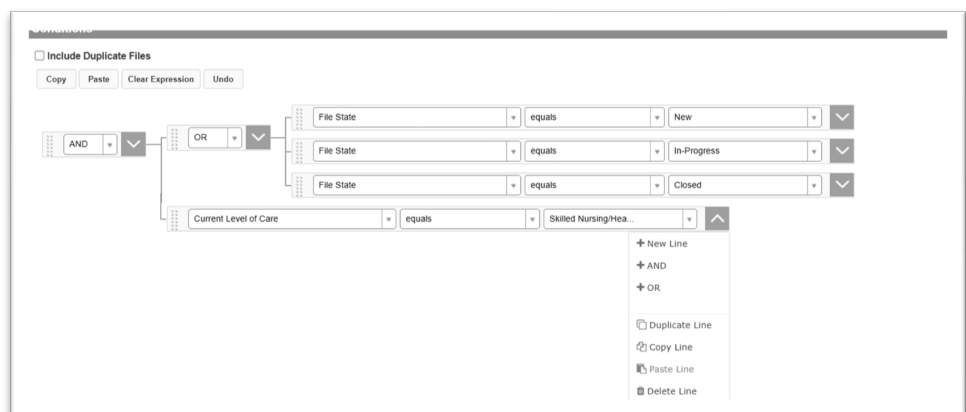|	
Step 16: If you are looking for all files in SNF, you can click "Run" to run the report.	
Step 17: Print your report. You can use the printer icon to print a hard copy of your report (or pdf) or you can use the upward facing arrow to export your report to a variety of formats.	
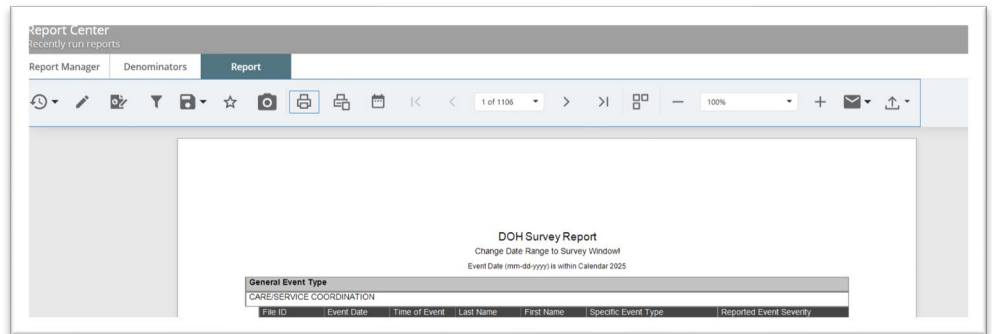
If you need to edit the conditions of your report....

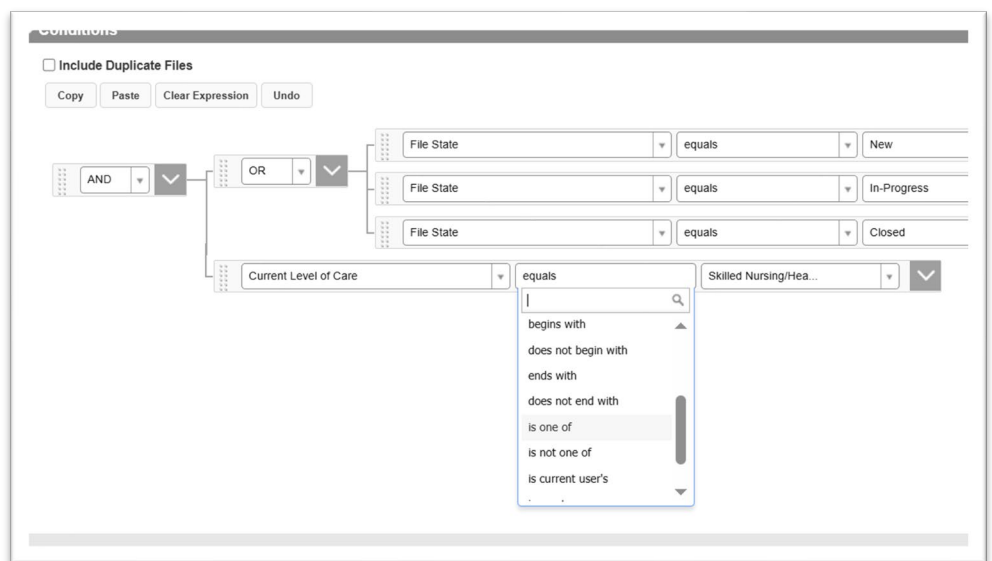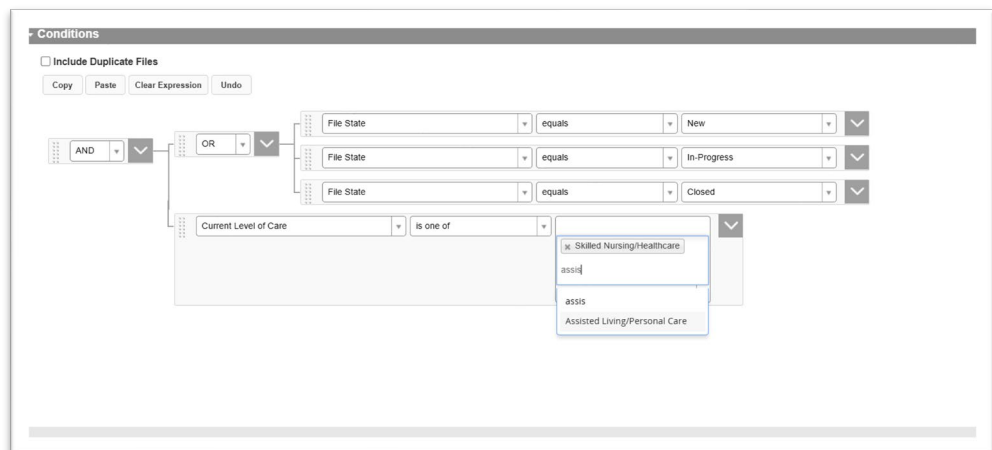|	
Case one: *You want to see all files, not just Skilled Nursing*. Click the downward facing arrow and select "Delete Line" on the line that reads "Current level of Care → equals → Skilled Nursing/Healthcare Final Result→	
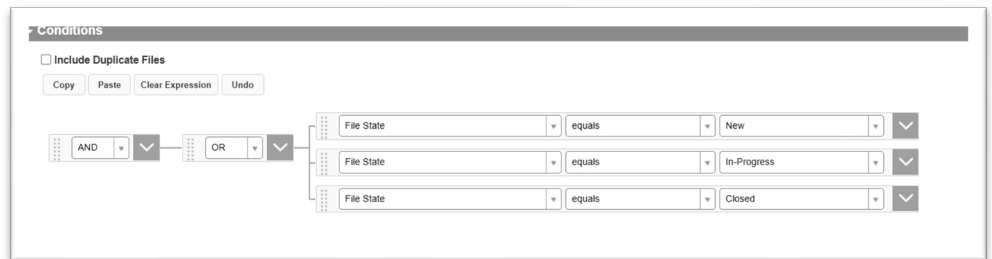
Case 2: *You want to see Skilled Nursing and Assisted Living.*

Click in the box that says "equals" and scroll down to select "is one of."

This will clear out the next box that previously read "Skilled Nursing/Healthcare."

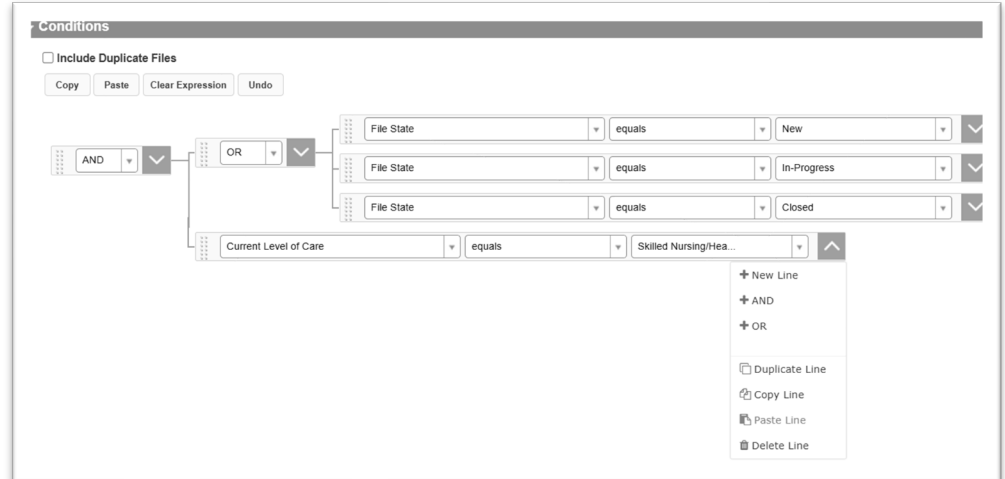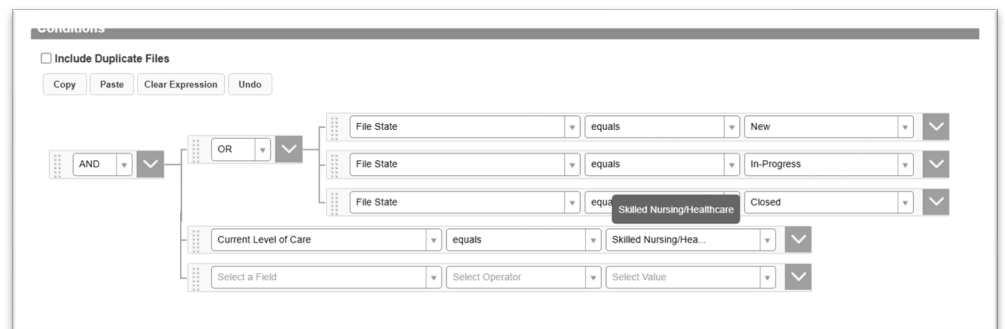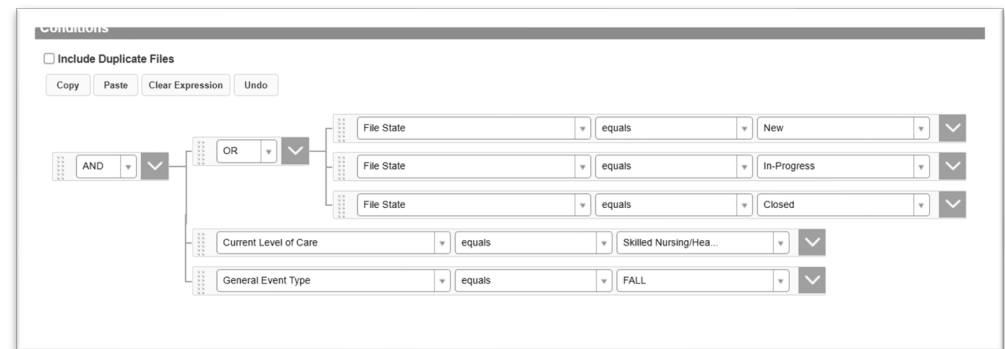Click in that box and start typing and select each level of care you would like included.

Case 3: *You only want one type of event,* for example "Falls" and only those that are in SNF.

Click the down arrow next to "Skilled Nursing"

In the new line make selection so that it looks for General Event Type → equals → Fall
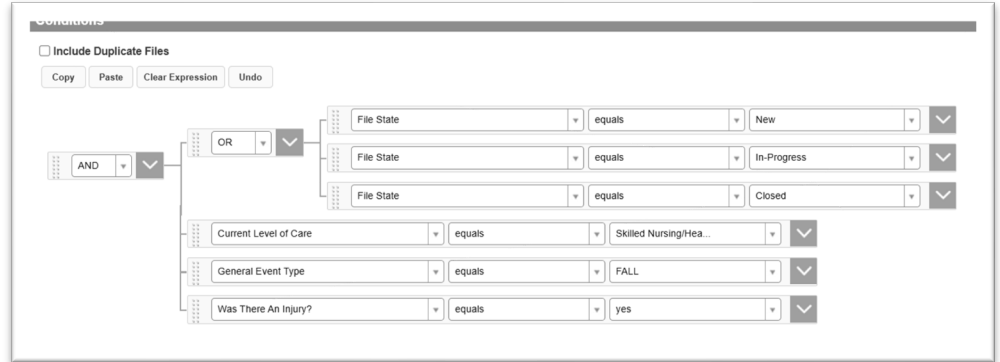

Final Result →

Case 4: *You only want to see Falls in Skilled Nursing that resulted in injury.*

Follow the steps above in Case 3.

Click on the down arrow next to "Fall" to and select "New Line" and complete the line so that it says "Was there an injury" "equals" "yes."