

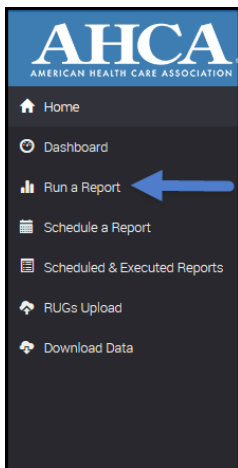
This document provides a summary of how to build reports in the LTC Trend Tracker system. Please note your level of access to LTC Trend Tracker is determined by your organization's account administrator. The account administrator assigns all user permissions, including access to individual centers' data and specific reports. Please contact your account administrator to learn more about this access. In addition, initial LTC Trend Tracker registration of a center must be completed by your corporate office or your owner.

Home Page

The home page allows users to learn more about important updates from AHCA, such as trainings, or when data was last updated. On this page the user can navigate to other areas on the LTC Trend Tracker system (dependent on your user permissions).

How to Generate a Report

The report feature allows users to see data about their center(s) and compare that data to a selected peer group. Users can customize their reports.



1. Once logged in, on the left there is a link to **“Run a Report”**

a. Click **“Run a Report”** to begin.

2. Next, select the report you want to see by clicking under **“Configure your Report Criteria”**. There is a drop down list of all the available reports to run. **Note:** Your ability to run certain reports such as Turnover and Retention is dependent on your user permissions. (for definitions of reports see glossary)

a. Select your report:

Note: You may select only one report at a time from the drop down list.



3. **“Limit my buildings for which I want to see results”** This sections allows you to select between one center, a specific buildings group, or a group of centers that has been defined by your account administrator (called “divisions”) ,or the whole organization (dependent on your user permissions). Check this box to run a report using a division, a building group, or a specific center.

Note: Center names listed come from the CMS database. Therefore this list will reflect the legal entity name for each center, as reported to CMS.

4. **“Limit my peer results geographically”** Use this section to select peers in the same (State/County/Zip Code etc.) as your centers or peers in a specific area other than where your centers are located. **(Please see glossary for definitions of geographic areas)**

Limit my Peer results Geographically:
 Only Peers that are in the same as my Centers.
 Only Peers that are in these areas:

a. “**Only Peers that are in these areas**” has an option for “**Saved Custom Geography**” (see report customization to learn more)

5. “**Limit my peer results to only peers that are**” check this box to compare centers based on demographic factors such as ownership, center type, urban/rural etc. **(Please see the glossary for more information)**

Note: You may select only one group from the drop down box.

a. “**Include my selected centers in peer results**” By default, your center(s) are excluded from the peer data reported. Check this box if you would like to include your center(s) data in the peer comparison group




Limit my Peer results to only Peers that are:
 Include my selected Centers in Peer results

6. **Note:** CASPER Citation Reports will have an additional menu to select tags by category, special tag groups and specific tags. (See report customization for more information)

7. Once finished with your selections, please hit the  button to go to the report screen.

How to Read the Reports, See Charts and Get More Detail:

On the report screen the data will be divided by “My Centers” and “My Peers.” “My Centers” is the center or centers that you have selected for your organization and “My Peers” is the peer group that you have selected. You may print this report, export the data to Excel, or export the report to a PDF file by clicking on the green buttons. Reporting periods vary by individual report. You may select “More” to see historical data or more detailed data.

 PRINT	 EXPORT TO EXCEL CSV	 EXPORT TO PDF		
	Current Survey	1st Prior Survey	2nd Prior Survey	
Survey Results				
Survey Date	2018	2017	2016	My Centers
	2018	2017	2017	My Peers
Number of Centers	384	384	384	My Centers
	15,619	15,437	15,279	My Peers

Once you click on “More...” a screen with a chart and a table will appear. This will allow you to see more historical data for your centers against the selected peer group. You have the option of printing, this page, exporting to excel or exporting the chart.



If you want to return to the report, please hit the  button on the bottom of the screen

If you want to build a new report, please select the build new report button on the bottom of the screen

 or select “Run a Report” on the left-hand side of the screen.

Creating a New Report:

On the bottom of the report page, you have the option to run a new report or run another report using the current selections.

If you select “Run a new report, do not re-use my selections” and click the “Run new report” button, you will return to the report builder screen to select your new report, centers and peer groups. If you would like to see a different report for the same centers and peer groups you originally selected, click “Run another report using the current selections,” then use the drop down menu to choose the report you would like and hit the “Run new report” button.

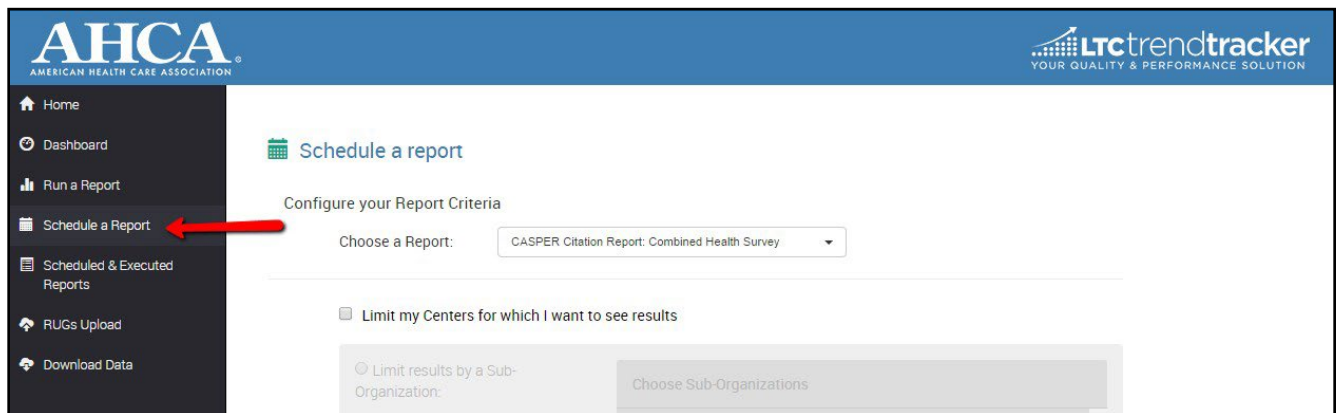
Saving Your Reports for Future Use:

LTC Trend Tracker provides users with the ability to save reports, once designed, so that you can come back and re-run the same report at a future time quickly and easily. Two options are available – scheduling reports and saving reports.

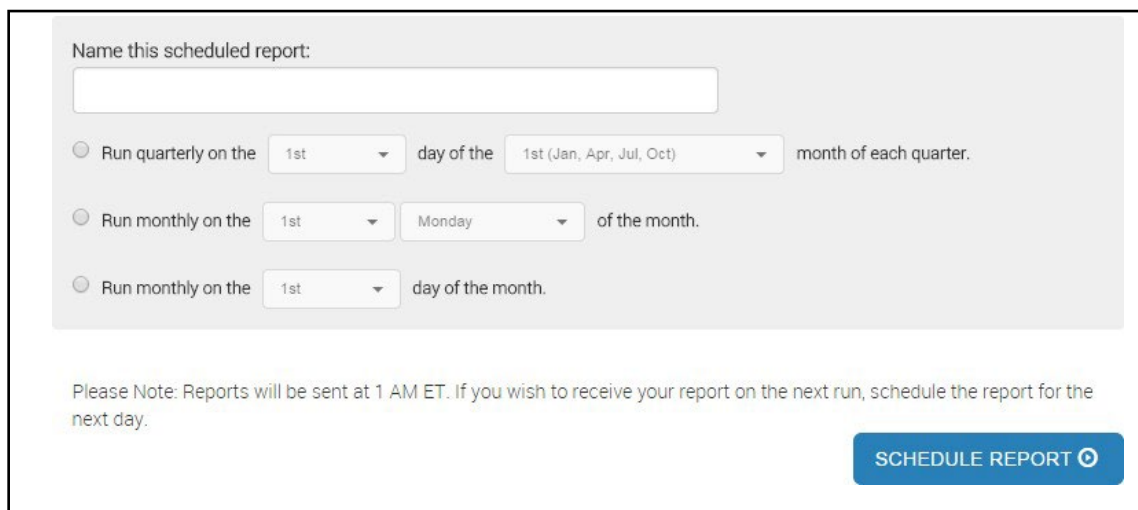
Generating a Report Using the Automated Report Scheduler

This allows the user to define and save desired reports and either (1) have the system automatically generate these reports and email the user when they are available or (2) see a list of saved reports and run them at any time on-demand with one click. Scheduled reports can be set up to run on a monthly or quarterly basis.

1. Select **“Save and Schedule Reports”**



2. Follow the same steps listed in the previous section to design the report: select the type of report, the included centers, geographic criteria and peer groups.
3. After the report design is complete, at the bottom of the window users will see the following options:



The screenshot shows the scheduling options for a report. It includes a text input field for 'Name this scheduled report:'. Below this are three radio button options for scheduling frequency: 'Run quarterly on the 1st day of the 1st (Jan, Apr, Jul, Oct) month of each quarter.', 'Run monthly on the 1st Monday of the month.', and 'Run monthly on the 1st day of the month.' At the bottom, there is a 'Please Note: Reports will be sent at 1 AM ET. If you wish to receive your report on the next run, schedule the report for the next day.' and a blue 'SCHEDULE REPORT' button with a circular arrow icon.

4. In the text box, give the report you wish to schedule or save a title of your choice.

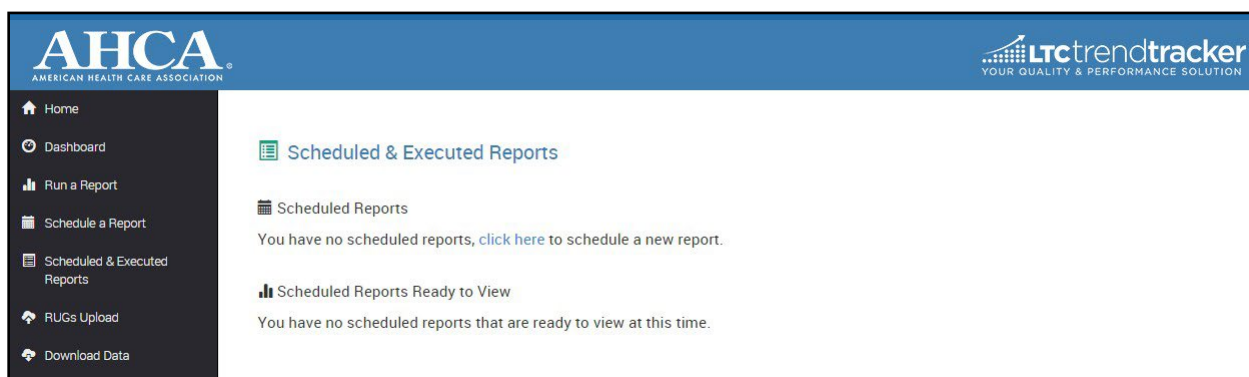
5. If you would like to schedule the report to run automatically, select form among the three timeframes listed:
 - a. Quarterly on specific day (1st, 2nd, 3rd) of the month of each quarter
 - b. Monthly on a specific weekday of the month.
 - c. Monthly on a given day of the month.

Note: Scheduled reports are run 1am ET on the scheduled date. If you are scheduling a report, the earliest date you should select is the **next** day. If you choose the current date, the next time the report will be run is one month or quarter from now (depending on your timeline selection).

6. If you do not want to schedule a report to run automatically, but would like to save the criteria for a report you have designed to use it in the future, select the “Save report criteria for running later, but do not schedule” option.
7. Whether scheduling or saving a report, click the blue “Schedule Report” button at the bottom of the screen to save all of your selections.

Accessing Scheduled Reports:

When a report you have scheduled is ready, you will receive an e-mail from reports@lctrendtracker.com alerting you that it has been run.



8. When you log in to LTC Trend Tracker, the scheduled reports that have been run will be displayed on the LTC Trend Tracker homepage. Simply click on the report that is ready to be viewed and the report will be downloaded. They can also be found under “**Scheduled & Executed Reports**” on the left-hand navigation pane.
9. Under “**Scheduled Reports**” on the homepage, a complete list of all the reports a user has scheduled will be displayed.
 - a. Under the **Name** column, the name of the report created by the user will be listed along with the frequency of when it is generated.
 - b. **Report Type** will list the type of report with all of the selected criteria.
 - c. “Started” will be displayed when the scheduled report is started
 - Run Now...** will allow you to run the report outside of the scheduled date
 - Remove...** will delete this report from your scheduled list.

Accessing Saved Reports:

When you log in to LTC Trend Tracker, the homepage will display a list of all of your “Saved Reports.” To generate a saved report, simply click “Run Now” and the report will be generated for you.

1. When you log in to LTC Trend Tracker, the homepage will display a list of your “Saved Reports.” They can also be found under “**Scheduled & Saved Reports**” on the left-hand navigation pane.
2. Under “**Saved Reports**” on the homepage, a complete list of all the reports a user has saved will be displayed.
 - d. Under the **Name** column, the name of the report created by the user will be listed along with the frequency of when it is generated.
 - e. **Report Type** will list the type of report with all of the selected criteria.
 - f. **Run Now...** will generate the report using your saved criteria
 - g. **Remove...** will delete this report from your scheduled list.

Customizing your reports:

LTC Trend Tracker provides users with the ability to customize reports. This section provides an overview of certain customization options.


Customizing your peer groups

Selecting this allows you to compare your results to certain peer groups such as state, county, or others. Once you make your selections, they will be saved for you to use in the future.

“**Only Peers that are in these areas**” has an option for “**Saved Custom Geography**”

Limit my Peer results Geographically:

Only Peers that are in the same as my Centers.

Only Peers that are in these areas: 

- State
- County
- City
- CBSA
- Census Division
- Saved Custom Geography

- a. To create a custom geographic peer group, select “**Only Peers that are in these areas**” then click “**State**,” “**County**,” “**City**,” “**CBSA**” or “**Census Division**” and select the desired geographic region. In the bottom box, add a label for your custom geographic criteria. (please see the glossary for more information on definitions)
- b. Then click the green Save Custom Geography button

For Example, if a user were to make Texas a Saved Custom Geography they would follow the steps below.

The screenshot shows a web form with the following elements:

- Step 1:** A checked checkbox labeled "Limit my Peer results Geographically:".
- Step 2:** A radio button selected for "Only Peers that are in these areas:".
- Step 3:** A radio button selected for "State" in a category list.
- Step 4:** A checked checkbox for "Texas" in a list of states.
- Step 5:** A text input field containing "TX" and a green button labeled "SAVE CUSTOM GEOGRAPHY (OPTIONAL)".

- c. To use your customized peer group, select **“Only Peers that are in these areas”** and then **“Saved Custom Geography.”** All custom geographic peer groups you have previously saved will be shown in a list for you to select from.
- d. Your custom peer group(s) will be available every time you run a report

How to Select Specific F-Tags and K-Tags for Citation Reports

Sometimes users will want to select specific F-Tags and K-Tags to benchmark your survey history to your peers. Users have the ability to select from the following categories. Once you have made your selection, click the Run Report Now button.

GROUP	DEFINITION AND HELPFUL HINTS
My Focus Tags	<p>This list of tags is selected by the individual user. Create ONE list of up to 15 tags for future use during report generation for Health and Life Safety survey reports.</p> <p>TIP: Use this feature to save a list of tags that you frequently review. For example, if you want to run a report for the tags currently under review by your quality committee, manually select those tags and click the “Save My Focus Tags” button. The next time you use Report Builder, choose “My Focus Tags” to run a report based on this pre-defined list.</p>

My Organization Tags	<p>This set of F- or K-Tags was selected by your organization to be a priority focus.</p> <p>NOTE: This category can only be set up by your account administrator</p>
Most Current Survey Tags	<p>Report Builder will create a list of the top tags by looking at the most frequently cited citations from the recent certification survey for the center or centers included in the “Center/Organization Selection” step.</p>
Most Frequent Tags (State)	<p>Report Builder will create a list of the top tags by looking at the most frequently cited citations from the recent certification survey for the state (or states) where the center or centers included in the “Center/Organization Selection” step are located.</p>
Most Frequent Tags (Nation)	<p>Report Builder will create a list of the top tags by looking at the most frequently cited citations from the recent certification survey for all centers in the national database.</p>
All other Categories	<p>The remaining options contain the tags indicated by the category label. For example: “Category: Admission, Transfer, and Discharge Rights (F201-F208) contains the F-Tags 201 through 208. Each category contains no more than 15 tags.</p>