

Getting prepared for running your 704/PPR Report

First: Enter any Missing Data

Caller/Consumer Search

People ID:

First Name:

Last Name:

Birthdate:

Phone Number:

Organization:

Last 4 SSN:

Search All?:

Consumer Quick Filters

Active 40

Closed 8

Contacts Overdue 12

Missing Data 8

Caller Quick Filters

Total I&Rs 0

Follow Ups 0

Use the Missing Data Button on Search page:

1. Open each missing data record and check **Gender**, **County**, **Race**, **Birthdate** and **Primary Disability** is entered on the Consumer Demographics Tab:

Consumer Demographics

Salutation: Master

*First Name: DJ

*Gender: Male

*County: Angoon

*Race: White

*Birthdate: 04/30/1980

Age: 44 Estimated Age:

Marital Status: Married

Communication Preference: Braille

Registered to Vote?: Yes

Is Veteran?: Status: Not a Veteran

Risk of Institutional Placement?:

Additional Addresses

Is Homeless?: No

NO MAILINGS:

Email: michelle@micil.com

TIN or SSN: Show

School:

Title:

Organization:

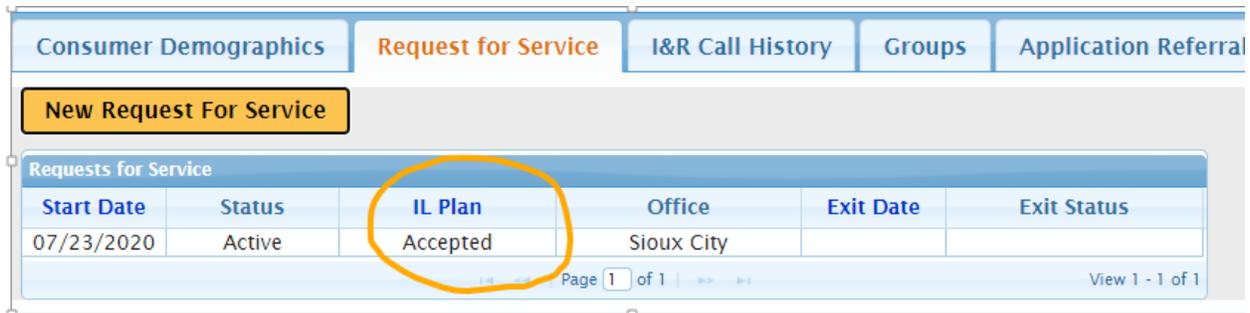
Other Org:

Other Comments: Note field to talk They don't well on the left side. has anger issues. When you visit watch...

Phone Type	Phone Number	Primary	Comments
Work	(808) 373-3796	<input type="checkbox"/>	

Disability	Primary
ADD/ADHD	<input checked="" type="checkbox"/>

2. Click on 'Request for Service' Tab and Make sure the IL Plan is Accepted or Waived:

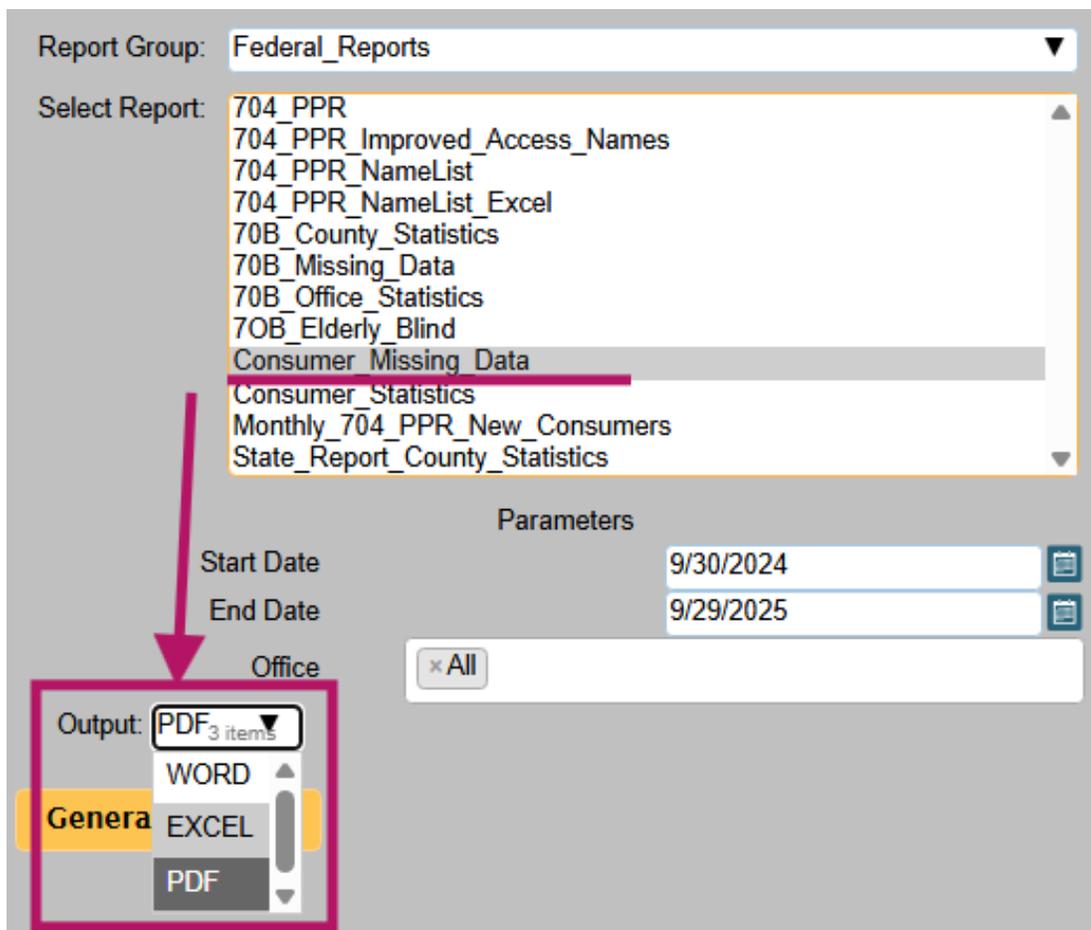


Consumer Demographics	Request for Service	I&R Call History	Groups	Application Referral	
New Request For Service					
Requests for Service					
Start Date	Status	IL Plan	Office	Exit Date	Exit Status
07/23/2020	Active	Accepted	Sioux City		

Tips to find missing data:

Use the 'Consumer_Missing_Data' in REPORTS/Federal Reports folder to find names that need Demographics filled out.

Use the Name_List_Excel report, change the 'Output' Drop down to 'Excel' and sort inside Excel to find missing items.



Report Group: Federal_Reports

Select Report:

- 704_PPR
- 704_PPR_Improved_Access_Names
- 704_PPR_NameList
- 704_PPR_NameList_Excel
- 70B_County_Statistics
- 70B_Missing_Data
- 70B_Office_Statistics
- 70B_Elderly_Blind
- Consumer Missing Data
- Consumer Statistics
- Monthly_704_PPR_New_Consumers
- State_Report_County_Statistics

Parameters

Start Date: 9/30/2024

End Date: 9/29/2025

Office: × All

Output: PDF (3 items)

- WORD
- EXCEL
- PDF

Second: Search for Consumers with no Service Contact Notes

Report Group: Consumers

Select Report:

- Active_Cases
- Active_Cases_By_Staff
- Closed_Cases
- Closed_Cases_By_Staff
- Closed_Cases_By_Staff_With_Open_Goals
- Consumer_Case_With_No_Contacts**
- Consumers_Missing_Contact_Note_Type
- Consumers_Without_A_Case

1. Use “Consumer_Case_With_No_Contacts to check for Consumers missing Service Notes.
-Enter a note for each person on the report.
2. Find Names where Staff didn’t finish adding the Consumer Intake by clicking the “New Consumer Service Intake...” button.

Consumer Demographics | **Consumer Service Intake** | I&R Calls | Groups | Associated Contacts | Documents

New Consumer Service Intake... | About Creating a Consumer Service Request...

Notification

Warning: Adding a Consumer Service Request will require you to create an Independent Living Plan (Consumer Goals) and signatures on the Consumer Profile documentation

A CSR requires the following:

1. Entry of Consumer Goals with Consumer signature on IL Waiver or on the Independent Living Plan.
2. Regular contact with the Consumer entered in Consumer Contacts (minimum of every 6 months).

Please be prepared to obtain the Consumer's signature on the IL Plan Waiver and Consumer Rights forms.

You may continue entering I & R Notes for either Consumers or I & R Callers.

Close

Third: Clean up Goals [Click on Reports in the top menu]

Check for Consumers with NO Goals entered using the Consumers_Goals/Consumer_With_Active_Cases_And_No_Goals report.

Reports

Note: Criteria will only filter for one selection per list.

For example, a report will not filter by Staff when more than one Staff is selected.

Report Group: Consumer_Goals

Select Report:

- Consumers_With_Active_Cases_And_No_Goals
- Goal_Type_By_Funder_And_Staff
- Goals_All_Open_During_Date_Range
- Goals_Completed_During_Date_Range
- Goals_Started_During_Date_Range
- Missing_Goal_Outcome_Dates**
- Statistics

Check for Goals that are entered that have no Outcome or Outcome Dates by using the Consumers_Goals/Missing_Goal_Outcome_Dates report.

This will show Goals still open and will help to determine if they need to be closed for example if they have been open for an excessive amount of time.

Send this report to Excel and check for older goals that are still open.

Fourth: Check Community Activities -Use the 'Missing_Data' Dropdown to find Community Activities that are missing Issues or an Outreach Goal.

Staff Center | People Search | Groups | **Community Activity** | General Services | Reports

Community Activities Search

Organization: Staff Name: zMICIL Support

Office/Unit Name: Start Date:

Activity Area: End Date:

Outreach Goal: Missing Data: 2 items

Issues
Outreach Goal

Search Reset Search N

Reporting:

Find Success Stories-

Report Folder: 'Consumer_Contacts_Groups' -Use 'Consumer_Contact_By_Staff_Details'

1. Use this to find Notes entered that were flagged as a Success.
2. Use this to find notes that have NO Services entered.

Report Group: Consumer_Contacts_Groups

Select Report: Consumer_Contact_By_Staff_Details
Consumer_Contact_By_Staff_Summary
Group_Service_Report_Details
Group_Time_Statistics
Staff_Group_Service_Report

Parameters

Staff: x All

Start Date: 10/1/2023

End Date: 10/31/2023

Funder: x All

Service Topic: x All

Office: x All

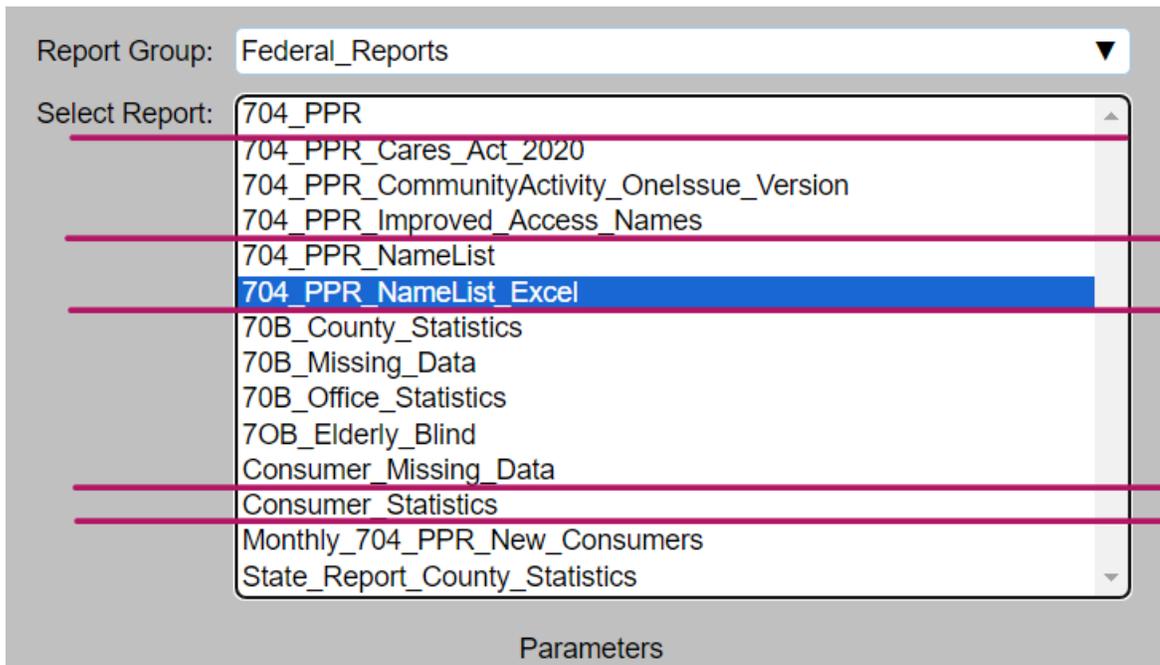
Notes w/ No Service Topic:

Success Story Only?:

Output: PDF (3 items)
WORD
EXCEL
PDF

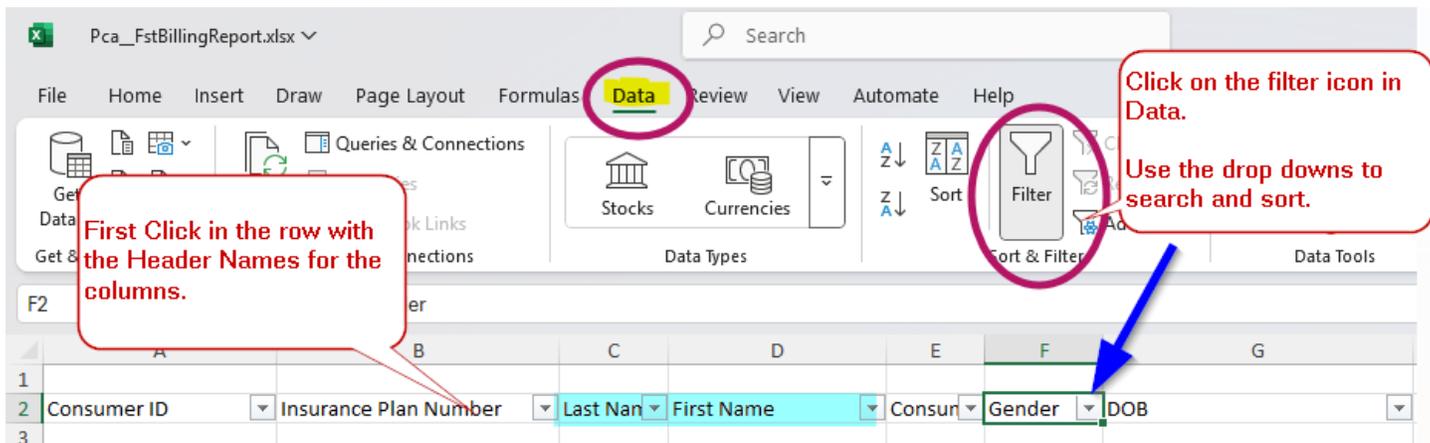
Select Report: 704_PPR_Individual_Services_Detail
704_PPR_Individual_Services_Detail_Names

3. Use 704_PPR_NameList_Excel report to see the names included in your PPR.
4. Use 704_PPR_Improved_Access_Names to see the names for that section.



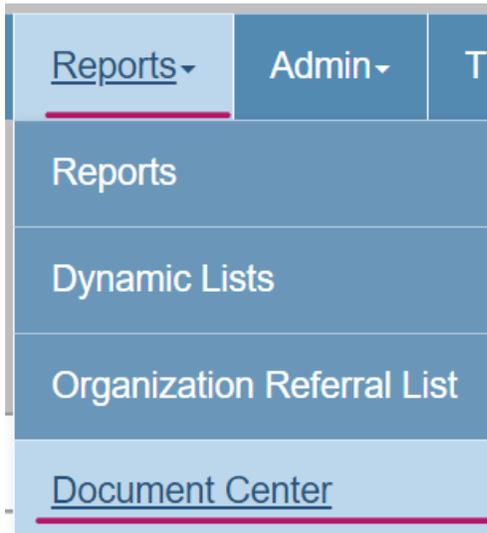
Tip: I like to change the 'Output' Drop down to 'Excel' and sort inside Excel.

In Excel use the Filter option to gain control over sorting and limiting the data



Last: Use your Document Center to keep a copy of your PPR!

NOTE! Always Upload your **PPR Name List** report and final **PPR Report** to your **Document Center** to keep in case of an audit in the future or any internal questions.



NOTE! Always check that your Service Topics are mapped to the correct 704/PPR Category in your ADMIN/Manage Lists area.

Pull up the Service Topics list and check the mapping.