Quick Steps for Running IMH Red/ Green Detail Report

- Click Reports and Select Print My Reports

- Select IMH Red/ Green Detail

- Click Print/Perform

- Select Beginning and Ending Dates to Match those Entered in the Summary Report

- Click Select under R/Client Providers and Select One or Multiple Option(s) to Match those Selected in the Summary Report

- Click Customize Report Layout

- Filter/ Export/ Print as Needed

The IMH Red/ Green Summary Report has to be Pulled Prior to the IMH Red/Green Detail Report
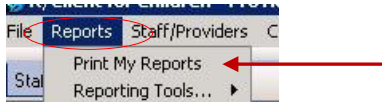
Detailed Steps for Running IMH Red/ Green Detail report:

        Note: *IMH Red/ Green Summary has to be pulled for the IMH Red/Green Detail report to work*
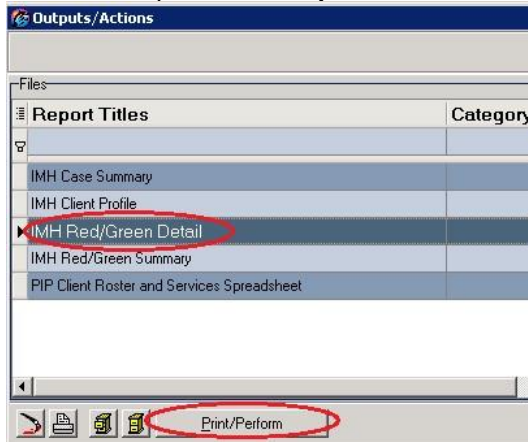
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.

2.　From the top menu, click on **Reports** and then select **Print My Reports**. This will open up your list of reports.
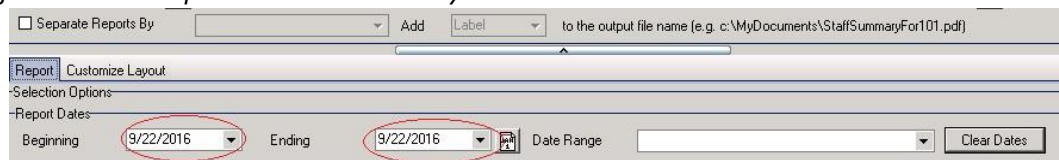

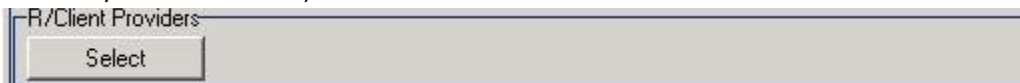3.　Select the report **IMH Red/ Green Detail** then click **Print/Perform.**

4.　Select the appropriate **Beginning** and **Ending** date for the time period you are looking.

The dates entered into the detail report must match the dates entered into the IMH Red/Green Summary for the detail report to work accurately.
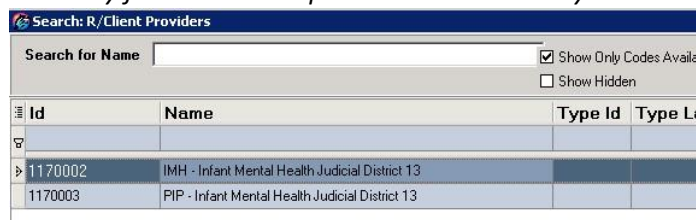

5.　Under R/Client Providers, click **Select.**

6.　Click the option(s) to choose one, multiple, or all (**Select All** button) options from the list. If selecting only one or multiples (without selecting all) click the **OK** button.

The selections entered into the detail report must match the details entered into the IMH Red/Green Summary for the detail report to work accurately.

7. Click the **Customize Report Layout** button.

Print	Customize Report Layout
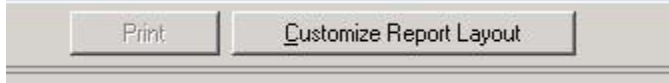
8. The following report (example below) will coincide with the IMH Red/Green Summary report you ran prior to this report.

| Measure	Case Name	Case Id	Related Client ID	Related Client Name	Included	Date of Screen	Eval status	Begin due date	End due date	Eval with 1 month grace period	Eval w/i due date	Assigned Staff	CT
01-Date of Birth	Again, Colin	1160004			Included							Data Team, Member	1
01-Date of Birth	Another test, Colin	1160017			Included							Data Team, Member	1
01-Date of Birth	James, Bobby	1160021			Included							Data Team, Member	1
01-Date of Birth	Mitchell, Mom	1160002			Included							Data Team, Member	1
01-Date of Birth	Sanchez, Ben	1160020			Included							Data Team, Member	1
01-Date of Birth	Sanchez, Brittany	1160018			Included							Data Team, Member	1
01-Date of Birth	Test, Child	1160006			Included							Data Team, Member	1
01-Date of Birth	Test-Case, Baby	1160009			Not Included							Data Team, Member	1
01-Date of Birth	Test-Case, Brother	1160010			Not Included							Data Team, Member	1
01-Date of Birth	User, Test	1160013			Included							Data Team, Member	1
02-Gender	Again, Colin	1160004			Included							Data Team, Member	1
02-Gender	Again, Colin	1160004			Included							Data Team, Member	1

9. To filter the measures in a way that reports out which clients are missing information, place your mouse over the column labeled **Included** until the filter option appears. Click the filter, then check the box next to the **Not Inlcuded** option.

Related Client Name	Include d ▽	Date of Screen	Eval status
	Not Included		
	Not Included		
	Not Included		
	Not Included		

10. To filter a report by assigned staff member, click in the upper right hand side of the **Assigned Staff** column until the filter option appears.
    Check the box next to the staff member(s) for review.

11. To export the filtered report for printing/ reviewing:
    a. Select the copy to clipboard icon in the bottom left corner of the Report Layout Options, open an excel sheet and paste/ format/ save/ print.
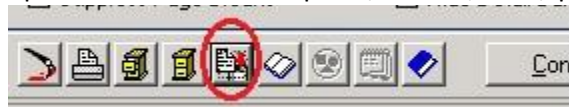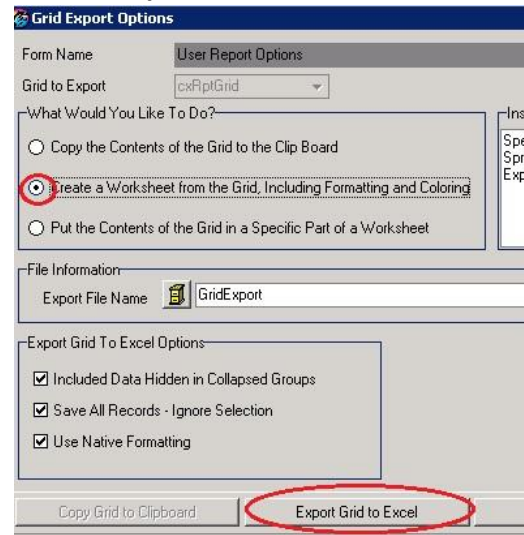
    b. To keep the exact formatting of the information that has been filtered/ expanded, click on **Reports** and then select **Export Grid f**rom the top menu.

From the Grid Export Options, choose **Create a Worksheet from the Grid, Including Formatting and Coloring**.

Click the **Export Grid to Excel** button and format/ save/ print.

If you need further assistance please contact the ECSC Database Services Team:
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