

Monthly Site Visit Form Report

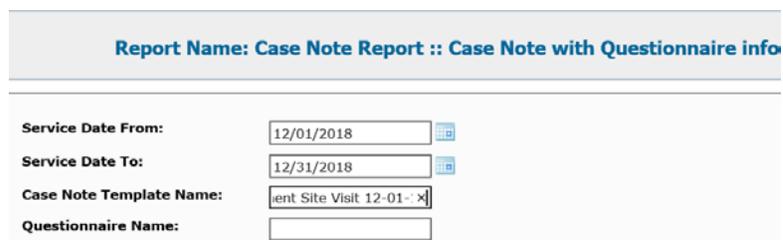
1. Login to Therap using the Administrator profile.
2. Go to Agency Reports tab and click on Report Library [view](#)



| Agency Wide Reports | |
|---------------------|--|
| Health | Staff Report View |
| Agency | Demographic Report View |
| Admin | Last Login Information View |
| Agency Reports | Report Library View |
| | Individual Contact Report View |

3. A search filter will load. Search for the report by entering “case note” in the search filter. Click on the report titled [Case Note Report: Case Note with Questionnaire info](#)

4. A new search filter will load. Complete the search filter as shown and click continue. For Case Note Template name enter exactly “**Case Management Site Visit xx-xx-xx**” (where xx-xx-xx is the date of implementation which will always be on the 1st of a month). The Questionnaire Name field can be left blank.



| Report Name: Case Note Report :: Case Note with Questionnaire info | |
|--|--|
| Service Date From: | <input type="text" value="12/01/2018"/> |
| Service Date To: | <input type="text" value="12/31/2018"/> |
| Case Note Template Name: | <input type="text" value="ent Site Visit 12-01-xx"/> |
| Questionnaire Name: | <input type="text"/> |

5. When the report loads, click “[Export to Excel](#)” and save the Excel workbook for your records.



Report :: Case Note Report :: Case Note with Questionnaire info

Showing only first 50 rows. Click on the link to get the full report in excel: [Export to Excel](#)

6. Paste data from the Export into the “Data Source” table at cell A2 following the instructions and tips in the “Instructions” tab of the workbook titled: DDSD Monthly Site Visit Report.
7. Save the new Excel Workbook with the data pasted in Data Source as a new workbook to view and analyze the tables in each worksheet:
 - Data Source- worksheet that houses the data exported and pasted from Therap
 - KPI #1 - ISP Implementation-Measures for Question 34.
 - KPI #2 - Completed Medical Appointments- Measures for Questions 17 and 18
 - KPI #3 – CCS in Non-Disability Specific Settings – Measures for Question 28.
 - Actions – Table provides snapshot of answers to Questions 43 and 44 about actions needed by individual case manager.
 - All Question filter – pivot table set up to organize and filter all questions by individual, case manager, service date, and response.
 - Instructions- Provides tips and instructions for copying and pasting large data sets, connecting to the data source, and printing.