

# SmartCare Reporting User Guide

# **Table of Contents**

Table of Contents	2
About this User Manual	3
Audience	3
Computer Literacy Assumptions for Understanding this User Manual	3
Reporting in SmartCare	4
Prerequisite Steps and Software Needed	4
How to Create a New Report	5
How to Set up a Shared Data Source	6
Creating a New Report Cont	8
How to Change Report Properties	8
How to Add a Data Set from SSMS	9
Global Code Translation	
Toolbox Window	
How to Format Columns	
How to Add Sorting	
How to Add Groups	
How to Add Sums, Counts, and Other Expressions	
Repeat Group Headers	22
Add Parameters – Date, Single select, multiple select, etc	24
How to Add Single Select or Multiple Select Parameter	
How to Upload RDL File to Reports Server	29
How to Add Report to User Roles	

# **About this User Manual**

This user manual is designed to provide a how-to guide of the features and functionality of SmartCare. It will outline how to complete each workflow in a step-by-step format with related screenshots that will make understanding how to complete each workflow easy. Through this guide, you will learn about SmartCare's comprehensive suite of tools and advanced technologies to enter client data securely and efficiently.

We hope that by following these instructions you will gain a better understanding of the capabilities of SmartCare so that you can start using the system right way with confidence.

#### Audience

This manual is intended for use by anyone who will use the SmartCare EHR to support Specialty Mental Health Services or Substance Use Disorder clinical documentation.

#### **Computer Literacy Assumptions for Understanding this User Manual**

- Ability to perform basic word processing such as typing and searching for documents in files
- Understands data entry techniques into electronic forms and documents
- Familiarity with running a windows operating system or other popular programs like Mac OS.
- Basic knowledge of data bases and their structure
- Basic knowledge of how to use internet browsers like Microsoft Edge and Google Chrome

**Note:** Before beginning to use the same system, make sure you have a compatible internet browser like Microsoft Edge and Google Chrome. CalMHSA recommends Google Chrome for best user experience.

Prior to creating reports in SmartCare, some perquisite steps and software will be required by the end user.

#### **Prerequisite Steps and Software Needed**

- 1. Get SQL server user account and password from Streamline
  - a. The SQL server user account will be read only and is NOT the same as your SmartCare user account
- 2. Install OpenVPNGUI software on your laptop or have IPSEC set up for your county to establish connection to the SmartCare databases
- 3. Install MS Visual Studio (plus plug in) or alternatively install MS Report Builder

About Microsoft Visual Studio		?	×
Visual Studio	License status License terms		
Microsoft Visual Studio Community 2022 (64-bit) - Current Version 17.5.1 © 2022 Microsoft Corporation. All rights reserved. Installed products:	Microsoft .NET Framework Version 4.8.04084 © 2022 Microsoft Corporation. All rights reserved.		
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4. The MS Visual Studio plug in can be downloaded here:

https://marketplace.visualstudio.com/items?itemName=ProBITools.MicrosoftReportProjectsf orVisualStudio2022

5. MS Report Builder can be downloaded here:

https://www.microsoft.com/en-us/download/details.aspx?id=53613

6. Install MS SQL Server Mgmt Studio (SSMS)

#### How to Create a New Report

To create a new report in Visual Studio, you must set up a new project as a first step. If you are using MS Report Builder, this step is not necessary. Follow the steps below to start the process:

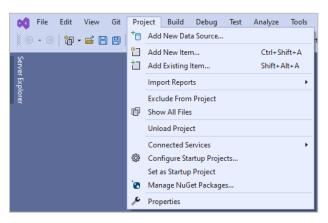
1. Open Visual Studio, click File and choose New and then select Project

00	File	Edit View	Git	Project	Build	Debug	Test	An	alyze	Tools	Extensions	Window	Help	,
8		New						•	御	Project			Ctrl+Shif	t+N
		Open						•	*	Reposito	ry			
Server	*	Clone Repository							<u>*</u> ]	File			Ctrl+N	
e E	5	Start Window								Project F	rom Existing C	ode		
Explore		Add						•	\$	From Co	okiecutter			

2. Enter report within search window to display selections and choose Report Server Project

Create a new project		report			× -		Clear all
Recent project templates		Query Language	•	Windows	-	SQL	•
Report Server Project		No exact matches found					
		Other results based on your	search				
SQL Server Database Project	Query Language	Report Server Proje Create a new Repo		erd er project using <mark>Repor</mark>	t Wizard.		
		Create an empty R		erver project.			
				finding what you're le istall more tools and			

3. There will be a need for a one-time modification of **Properties** to set the Target Server Version



4. Set the TargetServerVersion to SQL Server 2008 R2, 2012 or 2014

est Report 1 Prop	perty Pages				? ×
Configurations	Active(Debug)	~	Platform: N/A	×	Configuration Manager
<ul> <li>Configuration</li> <li>General</li> </ul>		* Build			
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		<ul> <li>Deployment</li> </ul>			
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		TargetServerVersion	SQL	Server 2008 R2, 201	2 or 2014 🚽
		TargetServerVersion			
		Identifies the version of SC	L Server Reporting	Services that is specifie	ed in the T
				ОК	Cancel Apply

#### How to Set up a Shared Data Source

1. After the project has been successfully set up, find the Solution Explorer and right click on Shared Data Sources and choose Add New Data Source

Solution Explorer	
ⓒ ⊇ 🎧 🚚   🧑 • ≒ 🗖 🗗   🖋 🛋	
Search Solution Explorer (Ctrl+;)	- م
<ul> <li>Solution 'Test Report 1' (1 of 1 project)</li> <li>Image: Image and I</li></ul>	
Shared Data Causas	1
🧉 S 🗍 Add New Data Source	
🖬 R Add 🕨	

 In the Shared Data Source Properties window, enter "Streamline" as the Name and choose Microsoft SQL Server for the Type

General	
Credentials	Change name, type, and connection options.
	Name:
	Streamline
	Туре:
	Microsoft SQL Server 🗸
	Connection string:
	Click here to type or paste a connection string Build

- 3. Next, click on the **Build** button to create the data source
- 4. In the Connection Properties window, enter your county's SQL Server IP Address in the **Server Name** field (do NOT click on Refresh)
  - a. Question How do I know my county's SQL Server IP Address for PROD and non PROD databases?
  - b. Answer Please contact CalMHSA to get this information

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erver name:			
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User name:	pmerna		
Password:	•••••		
	Save my password		
Connect to a data	hace		
	r a database name:		
-	nartcareTrain		~
Attach a data	oase file:		
			Browse
Logical nam			

- c. Enter the user name and password for the SQL Server account previously requested from Streamline
- d. If the user name and password are correct, click on the **Select or enter a database name** field will display the list of databases that are available based on the permissions of the SQL Server user account

CalMHSASmartcareTrain	v
Attach a database file:	
	Browse
Logical name:	
	Advanced.

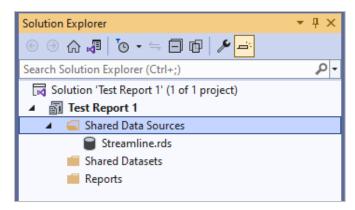
5. Click **Test Connection** to verify the connection is successful

User name:	pmerna
Password:	Test results
	Save
Connect to a data	Test connection succeeded.
Select or enter	
CalMHSASm	nartcareTra
O Attach a datal	
	Browse

6. In the Credentials window, you should see the user name and password in the **Use this user name and password** prompt to avoid re-entering the user name and password when previewing data

Shared Data Source Properties				×
General Credentials	hange the cred	lentials used to connect to the data	source.	
	<ul> <li>Use this user na</li> <li>User name:</li> <li>Password:</li> <li>Prompt for cree</li> <li>Enter prompt</li> </ul>	pmerna dentials t text: er name and password for data source Stream	nline:	
Help			ОК	Cancel

7. Upon completion, there should be a new datasource called **Streamline.rds** 



# **Creating a New Report Cont.**

Now that a project and datasource have been set up, a new report can be associated within the project and data source.

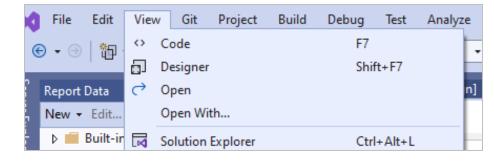
1. Right click on Reports folder and choose Add New Report

🔺 🚄 Share	ed Data Sources		
📄 St	reamline.rds		
📕 Share	ed Datasets		
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5	Add New Report		
	Add	+	
	Import Reports	•	t.rdl
æ	Properties	Alt+Enter	

2. When creating new reports for your county, think about **Naming Convention** and be consistent with it. Upon selecting a report from a drop down list in SmartCare, all reports (product or custom) will be in the same drop down alphabetically so the naming convention can be important to quickly navigate to the county reports

#### **How to Change Report Properties**

1. You can change the report properties such as margins by clicking on **View** from the top level menu and then choose **Properties Window** 



	Previous Task	
۶	Properties Window	F4
	Property Pages	Shift+F4

• **Note**: you must click on the main report area to get all report properties such as margins

Properties	<b>▼</b> ₽ ×
Report	•
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#### How to Add a Data Set from SSMS

- 1. Next add Dataset which is equivalent to a query, this is where you need to create a query from MS SQL Mgmt Studio
- 2. Create data set in MS SQL Server Mgmt Studio

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## **Global Code Translation**

Since SmartCare is a normalized database, all global code fields in any table will only contain the code and in order to display the more user friendly global code description, a function will need to be used as follows:

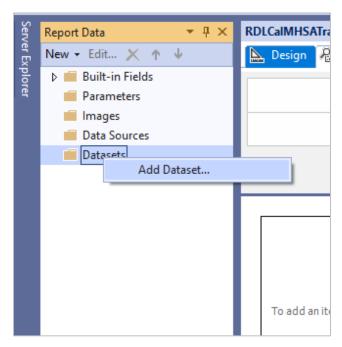
SQLC	Query3.sql -	10Train (pr	nerna (78))	SQLQuery2.so	I - 10Train (p	merna (56))*
	Select Clien , First , LastN , forma	Name				
	, Emplo from Cl	ymentStatus	;			
	-					
100 %	6 👻 🔍					
■	Results 📑	Messages				
	ClientId	FirstName	LastName	(No column name)	MaritalStatus	Employment Status
1	1	Client	Everyman	00-01-2000	56297	NULL
2	1007	JaCoB	BAizE	00-27-2003	56302	56403
1	1000	1.1	0.00	00.00.1000	ALC U.L.	ALC U.L.

In this example, the MaritalStatus and EmploymentStatus are examples of global codes where just the code is in the Clients table. To display the description of the global codes, a function can be used as shown below:

1. Enter dbo.ssf\_GetGlobalCodeNameById prior to database field enclosed in parentheses

SQLC	Query3.sql ·	- 10Train (pr	merna (78))	SQLQuery2.sq	l - 10Train (pmerr	na (56))*	SQLC
	Select Clien , First , LastN , forma , dbo.s	Name lame t(DOB,'mm- sf_GetGlob sf_GetGlob	<mark>dd-yyyy'</mark> ) alCodeNameB	yId(MaritalStat yId(EmploymentS			
100 %							
	Results 📄	Messages					
	ClientId	FirstName	LastName	(No column name)	(No column name)	(No column name	e)
1	1	Client	Everyman	00-01-2000	Never Married	NULL	
2	1007	JaCoB	BAizE	00-27-2003	Unknown	Employed Full Ti	ime
3	1008	Junior	Smith	00-09-1993	NULL	NULL	
4	1009	Service	Everyman	00-12-2019	NULL	NULL	

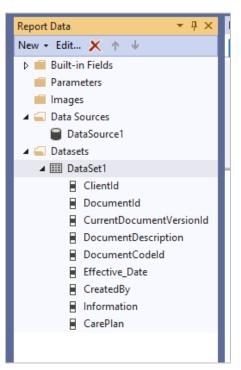
2. Next, copy the query and add it to the dataset in MS Visual Studio by right clicking on DataSets and choose Add Dataset



3. Select Use a dataset embedded in my report, choose Text for Query Type and copy query text into Query: box and then click OK

ields	Choose a data source and create a query.
ptions	Name:
Iters	DataSet1
arameters	<ul> <li>Use a shared dataset.</li> <li>Use a dataset embedded in my report.</li> </ul>
	Data source:
	DataSource1 V New
	select doc.Clientid ,doc.Documentld ,doc.DocumentVersionld ,doc.DocumentCodeld ,FORMAT(dv.EffectiveDate,'d','en-us') as 'Effective Date' ,dv.CreatedBy ,pn.Information ,pn.CarePlan From DocumentVersions dv on doc.CurrentDocumentVersionId=dv.DocumentVersionId and dor DocumentVersions dv on doc.CurrentDocumentVersionId=dv.DocumentVersionId and
	doc.DocumentId=dv.DocumentId join CustomDocumentProgressNotes pn on dv.DocumentVersionId=pn.DocumentVersionId ORDER BV doc.ClientId desc
	Query Designer Import Refresh Fields Time out (in seconds):

4. Now the dataset is available under **Datasets** area of Report Data window



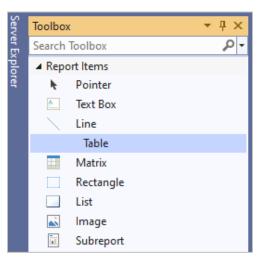
Fields from SQL query created in MS SQL Server Mgmt Studio are now available to insert into report layout in MS Visual Studio

#### **Toolbox Window**

1. Click View on top menu and choose Toolbox or click Ctrl+Alt+X to display toolbox window

Ê	Task List	Ctrl+ T
<b>⊡</b>	Toolbox	Ctrl+Alt+X
Ļ	Notifications	Ctrl+ Ctrl+N
>_	Terminal	Ctrl+`
	Other Windows	•

2. Left Click on Table and drag into report Design area



3. A table will appear with a default three columns (more can be added later)

ign]*				
1				
Header	Q			ר
Data				
	Ū			
	Header Data	Header	Header Data	Header Data

4. Click on upper right of a cell to select field for that column

CalMHSATrrdl	[Design]* ⊰¤	×		
Design 🖓 Pre	view			
		Header		
_	1			
=	55	ClientId		
	242	DocumentId		
	22	CurrentDocumentVersionId		
	22.			
	<b>EEE</b>			
	242	Effective_Date		
		CreatedBy		
		CreatedBy		

5. To add more columns, right click on column header to get contextual menu to add or remove columns

Client Id Effective Date Current
Client Id Effective Date Current
Client Id       Effective Date       Current       Delete Columns       Right         [ClientId]       [Effective_Date]       [CurrentDocume       Image: Column Visibility       Image: Column Visibility

#### 6. Repeat as necessary

Preview     Preview a Report     Image: Client Id   Effective Date Current Document Version Note Information Care Plan [ClientId] [Effective_Date] [CurrentDocumentVersionId] [Information] [CarePlan]	RD	LCalMHSATrrdl [Design	ı]* ⊅ X						
Client Id Effective Date Current Document Version Note Information Care Plan		🚡 Design 🖓 Preview							
		Preview a Rep	port						
				0		N	1.6		
[ClientId] [Effective_Date] [CurrentDocumentVersionId] [Information] [CarePlan]									
		[ClientId]	[Effective_Date]	[CurrentDo	cumentVersionId]	[Infor	mation]	[CarePlan]	

7. Add more columns and then click Preview tab

	rdl [Design] → 2		ALICATaninin a Domest	2022.07.01
		st Report 1\Test Report 1\RDLCalN	00%	2023_07_01.rdl [De
Client Id	Effective Date	Current Document Version	Note Information	Care Plan
		Id	Tanting to any if	Testing
1300		3039	Testing to see if this gets overwritten	Testing error correction process.
1299		3622	;laujer;oi uja;ldsfj w[eori aspiej ;lakdjs'paewi f a;so d'uje'asdjf	
1285	1/30/2023		Summary of needs/Rationale that supports the level of care determination: l;aliwefadhf,lwaeif j ashf, alhe ; Client's current needs: Client's goals: Transition/discha rge planning: Recommendation	
1244			s/Plan of Care: Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a	

8. Back to Design tab, center labels and choose background color and click OK.

3

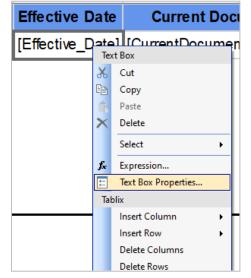
		No Color   No Color
う・ Ĉ ∗   Debug ・ Defa		▷ ■ Arial • 10pt • B / U A ■ Ξ Ξ Ξ Ξ Ξ = € • E • E = Solid Background Color
RDLCalMHSATrrdl [Design	ו]* ⇔ X	••••• <u>•</u> ••••••••••••••••••••••••••••••
, Client Id	Effective Date	Current Document Version Note Information Care Plan
[ClientId]	[Effective_Date]	[CurrentDocumentVersionId] [Information] [CarePlan]

Choose Color

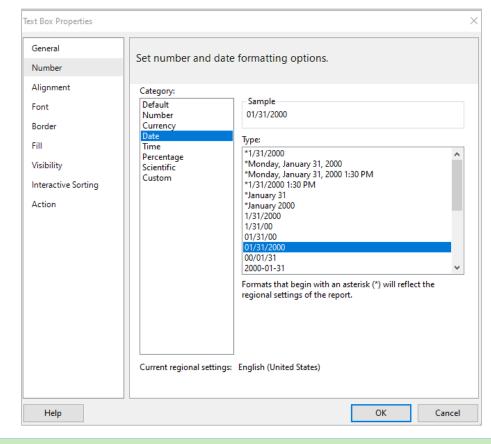
 $\times$ 

## **How to Format Columns**

1. You can format certain columns to be of certain data types such as a date by clicking on the column and choose **Text Box Properties** 

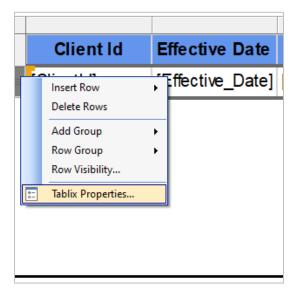


2. Select Date in Category box and then select date format and click OK



# How to Add Sorting

1. Right click on left border of column, select Tablix Properties



2. Choose Sorting and Add column(s) to sort report

ablix Properties	
General Visibility	Change sorting options.
Filters Sorting	Add Delete 😨 🦻
Sorting	Column Order
	Sort by [Effective_Date] $\checkmark$ A to Z $\checkmark$
	Then by [ClientId] V 🖍 A to Z V

# **How to Add Groups**

1. Right click on left border of first column and choose Add Group and then select Parent Group

	Client Id	E	Effective Date	Cui
r,	Insert Row Delete Rows	•	두ffective_Date] [Curr	en
	Add Group	•	Row Group	
	Row Group Row Visibility	•	Parent Group Child Group	
8- 0-	Tablix Properties		Adjacent Above Adjacent Below	

2. Choose column for parent group from the list, choose Add group header and/or Add group footer and click OK

Tablix group		×
<ul> <li>Group by:</li> <li>Show detail data</li> </ul>	[DocumentId]	~ <b>f</b> .
<ul> <li>✓ Add group header</li> <li>✓ Add group footer</li> </ul>		
Help		OK Cancel

3. Redundant columns can be removed from details area by right clicking on the column and then choosing Delete

Document Id		Client Id	Effe
	Te	ext Box	
[DocumentId]	Ж	Cut	
[Documentia]	Ēþ	Сору	
	Ê	Paste	ie i
	×	Delete	
		Select	•
	fx	Expression	
	8- 0-	Text Box Properties	
	Ta	ıblix	

#### 4. Print Preview with Group added

Care I
Care

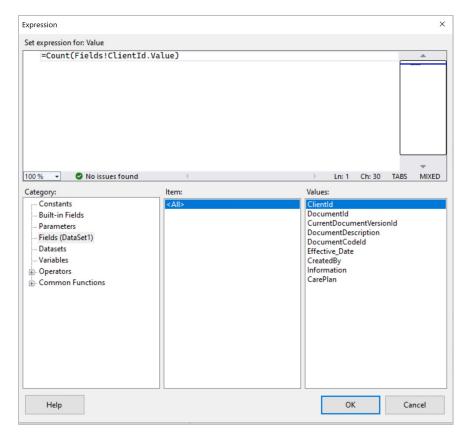
## How to Add Sums, Counts, and Other Expressions

1. Now that a group has been added, it is possible to add sum fields by simply right clicking on the field that needs to be summarized and then choose **Expression** 

Document Id1	Client Id	E	ffective Date	
[DocumentId]				
	[ClientId]		Effective Date]	[Ci
		Te	xt Box	
l		Ж	Cut	
		Ē	Сору	
		Ê	Paste	
		×	Delete	
			Select	►
		fx	Expression	
			Text Box Properties	
		T-1	L I	

2. In the expression **Category** window, choose the Common Functions and expand and click on **Aggregte** and then choose the type of summary from the Item list

Ln: 1 Ch: 8 TABS MIXE
Description Returns a count of the values from the specified expression.
Example =Count(Fields/FirstName.Value) =Count(Fields! FirstName.Value, "GroupByInitial") =Count(Fields! FirstName.Value, "GroupByInitial", Rece sive)

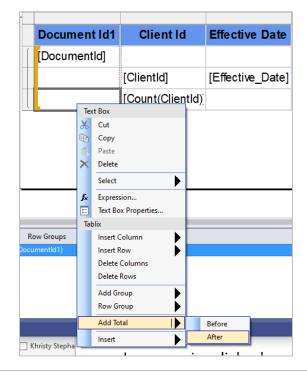


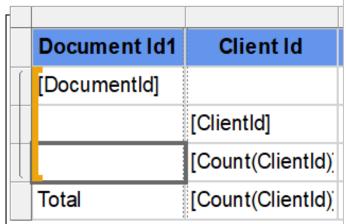
3. Next, click on Fields (Dataset1) and then select field to aggregate such as ClientId to create a count of client IDs and manually enter the end parenthesis and click OK

F84 ≽ 河 🛛 🗯	8 😌   🛱 📕	100% 🛛 🔍 🗸	6 🗸		
			•	Find   Next	_
Document Id1	Client Id	Effective Date	Current Document Version Id	Note Information	Care Pla
566					
	1062	11/1/2022	581		
	1				
567					
	1070	11/1/2022	582		
	1				
568					
	1032	11/1/2022	583		
	1				
569					
	1038	11/1/2022	584		

4. To insert a grand total, right click in group footer and select Add Total and then select After

	Document Id1	Client Id	E
Í	[DocumentId]		
		[ClientId]	[[
Ţ		[Count(ClientId)]	
	Total	[Count(ClientId)]	





#### 5. Click **Preview**

Design 🖓 Preview						
( 83 of 84 > >)	• 🐵 🕸 📾	📑 🍋 🔍 🔫   100	)%	Find N	ext	
		1				
	3537					
		1032		3655	This portion of the note goes to all	
					Done	
		1				
	3621					
		1239		3740	Information about the service here.	
		1				
	3623					
		1239		3742	Information on the service	Care plan notes
		1				
	3629					
		1157		3748	TEST NOTE	
		1				
	3698					
		1032		3821	Note	Good plan
		1				
	al	174				

## **Repeat Group Headers**

1. Sometimes the amount of data within a group will exceed the display area of a page and will create data over multiple pages however it will be helpful to end users to display the group header so the user knows what group a given record is associated with. In order to do this, we will need to repeat group headers as shown below:

Document Id1	Client Id	Effective Date	Current Document	Note	Care Plan
[DocumentId]					
	[ClientId]	[Effective_Date]	[CurrentDocumentVersionId]	[Information]	[CarePlan]
	[Count(ClientId)]				
Total	[Count(ClientId)]				
				View	/ Ruler
					Grouping
				Add Page Footer	Parameters
			8-	Report Properties	

2. Click outside of report print area and right click with mouse to get **View** options and choose **Grouping** which will display the grouping view below report print area on screen



3. Click downward triangle in **Column Groups** and select **Advanced Mode** which will display row groups, click on **Static** which will highlight first group and then display **Tablix Member** in **Properties** tool box

			1 .	2 .		] 4 .
-			-			
-	_		Document Id1	Client Id	Effective Date	Current Do
-			[DocumentId]			
-				[ClientId]	[Effective_Date]	[CurrentDocume
-		Į		[Count(ClientId)]		
-			Total	[Count(ClientId)]		
-						
-						
-						
E	Ro	w Gr	oups			đ
S	tatic					
	(Sta	tic)				

4. Within Tablix Member change properties to RepeatOnNewPage – True, KeepWithGroup - After

Tablix Member -							
<b></b>							
- 11							
- 11							
- 11							
- 11							
- 11							
- 11							
- 11							
- 11							
-							
ComponentMetadata							

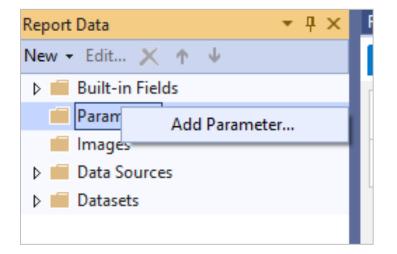
#### 5. Click Preview

n 🖓 Preview						
of 44 🌛 🌖   🖮 🛞 🚱   🏦 🛄	和見一	100%	•	Find Next		
Doc	ument ld1	Client Id	Effective Date	Current Document Version Id	Note Information	Care Plan
	1184					
		1032			document the session	This is where the clinician will document the treatment plan.
		1				
	1194					
		1096		1236		
		1				
	1195					
		1062		1237		
		1				
	1196					
		1070		1238		
		1				
	1197					
		1091		1239		
	1198	1				
	1190	1080				
		1080		1240		
	1199	1				
	1135	1032		1241		
		1032		1241		
	1200					
		1038		1242		
		1000		1272		

6. Group headers are now on each page

#### Add Parameters – Date, Single select, multiple select, etc.

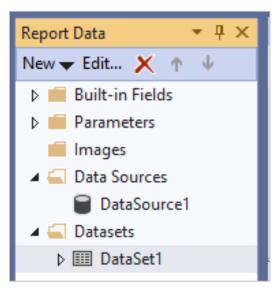
 To make reports more useful, it will be necessary to allow end users to input values prior to running a report to determine which records will be displayed via parameters. To add parameters, simply right click in the Parameter area of the Report Data window and click Add Parameter



2. Enter the Name and Prompt of the parameter and choose the Data type

Report Parameter Propert	ties	×
General Available Values	Change name, data type, and other options.	
Default Values	Name:	
	ReportParameter1	
	Prompt:	
	ReportParameter1	
	Data type:	
	Date/Time 🗸	
	Allow blank value ("")	
	Allow null value	
	Allow multiple values	
	Select parameter visibility:	
	Visible     Hidden	
	O Internal	
Help	OK Ca	ncel

3. If the parameter(s) are not included in the dataset query, they can be inserted editing the query text



4. Double click on the **DataSet** to display query window and modify query to add parameters

Dataset Properties	,
Query Fields	Choose a data source and create a query.
Options	Name:
Filters	DataSet1
Parameters	Use a shared dataset.
	O Use a dataset embedded in my report.
	Data source:
	DataSource1 V New
	<ul> <li>Text Table Stored Procedure</li> <li>Query:</li> <li>select doc.ClientId ,doc.DocumentUersionId ,doc.DocumentDescription ,doc.DocumentOescription ,doc.DocumentCodeld ,FORMAT(dv.EffectiveDate,'d','en-us') as 'Effective Date' ,dv.CreatedBy ,pn.Information ,pn.CarePlan From Documents doc</li> </ul>
	join DocumentVersions dv on doc.CurrentDocumentVersionId=dv.DocumentVersionId and doc.DocumentId=dv.DocumentId join CustomDocumentProgressNotes pn on dv.DocumentVersionId=pn.DocumentVersionId WHERE dv.EffectiveDate between @EffDateFROM and @EffDateTHRU ORDER BV doc ClientId decc
	Query Designer Import Refresh Fields
	Time out (in seconds):
Help	OK Cancel

5. For date parameters, enter new statement in WHERE clause of query such as dv.EffectiveDate between @EffDateFROM and @EffDateTHRU

RDLCalMHSATrrdl [Design]* 👳 🗙	
📐 Design 🖓 Preview	
Eff Date FROM	Eff Date THRU

6. Report **Design** tab now shows date parameters, double click on Eff Date FROM and Eff Date THRGU parameters to modify **Data Type** properties and change from text to Date/Time

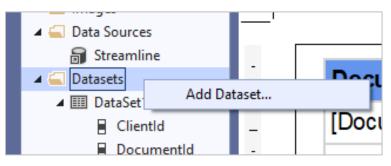
Report Parameter Properties	i	×
General Available Values	Change name, data type, and other options.	
Default Values	Name:	
Advanced	EffDateFROM	
	Prompt:	
	Eff Date FROM	
	Data type:	
	Date/Time ~	
	Allow blank value ("")	
	Allow null value	
	Allow multiple values	
	Select parameter visibility:	
	Visible	
	Hidden     Internal	
Help	OK Can	cel

7. On Preview tab, enter parameter values and click View Report

	SATrardl [Design] → ×									÷ 0	
	—	Eff Date THRU	4/2/2023						[	View Report	
[€ € ]	of 4 🎉 🕅   🗕 🛞 🎲  )	화 🔲 和 🔍 -   1	100%	•	Find Next						
										Î	
		Document Id1	Client Id	Effective Date	Current Document Version Id	Note Information	Care Plan				
		2376									
			1080	1/18/2023	2467						
		2377									
			1070	1/18/2023	2468						
		2381	1005		2472						
			1096	1/18/2023	2472						
		2382	4050		2473						
			1062	1/18/2023	24/3						
		2383	1022	1/18/2023	2474						
			1032		24/4						
<		0404									
Error List Entire Solu	rtion 👻 😵 0 Errors	🛕 1 Warning 🛛 🕕 0	Messages	Build + IntelliSe	nse 🔻				Search Error List	× ۹ - ۹	
	escription ustom parameter layout was remov	ad from the report SC	DI Senver 2014 Per	orting Services and	d andier do not support surtom n	arameter la vout	Pro	oject	File RDLCalMHSATrainingRe	Line	
<b>A</b> C	ustom parameter layout was remov	eu nom the report. Se	2L Server 2014 Ke	Jorting Services and	a earlier do not support custom p	arameter layout.			KDECalminoAlrainingKe	p 0	
rdl [Design] 👍 🗄	×										
Preview											
1/1/2023	Eff Date T	HRU 4/2/2023									View
of 🕨 🕅 🗰 🐼	🙆 (唐 <mark>日</mark> 和 북국)	100%	-	Fir							

#### How to Add Single Select or Multiple Select Parameter

- 1. To add a single or multiple select parameter, an additional data set must be added for each single or multiple select parameter.
- 2. Right click on **Datasets** and choose **Add Dataset**



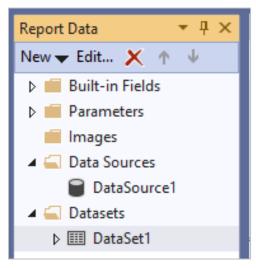
3. In the Dataset Properties window, choose **Use a dataset embedded in my report** and choose the **Streamline** dataset already created and then choose **Text** for **Query Type** and enter the query text for the parameter

Dataset Properties		×
Query Fields	Choose a data source and create a query.	
Options	Name:	
Filters	DataSetPrograms	]
Parameters	<ul> <li>Use a shared dataset.</li> <li>Use a dataset embedded in my report.</li> </ul>	
	Data source:	
	Streamline Y New	
	Query type:   Table Stored Procedure Query:  SELECT ProgramId, ProgramCode	
	FROM Programs ORDER BY ProgramCode asd	
	Query Designer Import Refresh Fields Time out (in seconds):	
Help	OK Cancel	

4. One final step to complete the parameter is to identify the fields that will display in the parameter and map them to the field source as shown below:

ataset Properties		×
Query	Change group and extend fields	
Fields	change query and calculated netus.	
Options Filters	Add Delete 3	
Parameters	Field Name Field Source	
	Programid	
	ProgramCode ProgramCode	

5. If the parameter(s) are not included in the dataset query, they can be inserted editing the query text



6. Double click on the **DataSet** to display query window and modify query to add parameters

WOLL, @ExecutedBystamd) WHERE ISNULL(s.RecordDeleted, 'N')='N' AND s. AND s.DateOfService >= @FROMDate AND s.Da AND p.Programld in (@Program) ORDER BY s.DateOfService desc, s.ClinicianId aso	teOfService <= @THRUDate	~
	Query Designer Import	Refresh Fields

#### How to Upload RDL File to Reports Server

To make the report available in SmartCare, it must first be uploaded to the county's report server. First, open an internet browser window and navigate to the url for the county report server. Note - the report server IP address and user ID and password can be obtained by contacting CalMHSA.

SQL Server Reporting	g Services				¢	<u>↓</u> ?	CalMHSA Reports
Favorites Browse			+ New ~	T Upload 🛛 🗋 Ma	anage folder 🛛 🖓 View	✓ Search	
SCDocuments							
Iome > Train > SCDocuments							
AGINATED REPORTS (1,958)							
277Reader	Accounts Receivable - Clinician Dashboard Deta	Accounts Receivable - *** Clinician Dashboard Summary	Accounts Receivable Summary	Accounts Summary	Receivable - Backup	Summary	s Receivable y - Clinician rd Sub Report
Accounts Receivable *** Summary - OP Mini Team Dashboard	Accounts Receivable Summary by Client	Accounts Receivable Summary by Primary Paye	Accounts Receivable Summary by Primary Payer - Backup	Active Cli Primary C	ents With No Dinician	Active CI Primary I	••• ients With No Program
Active Clients Without Diagnosis	Active Pharmacy List	Active Pharmacy List-In Progress	Adjudication Summary Report	AlertRele Expiring	*** aseOfInformation	AlliesGLE	*** extractCSV
ARaging	ARReportByCoveragePlar	ARReportByPayer	ARReportByPayerType	Attendan	••• ceReport	Audit Lo	···
Auth Details By Provider	Authorization Code to Procedure Code Map	Authorization Missing Report	Auths Missing Coverage Plans	Axis Land Description	II Codes and	Billable C Coverage	 Ilinicians By 2 Plan
Blank5Lines	BlankSLinesASAM	Board Reporting By Coverage Plan	BQuIP Summary	BWCVoc		California relmages	aANSARDLSignatu
ИНSA		Reporting Us	ser Guide		Page	29	

1. Click on Upload button and navigate to the file path where the report is saved

$\leftarrow \rightarrow \checkmark \uparrow$						
ganize 🔻 🛛 New fold	er				•=== <b>•</b>	
CalMHSA Drive · ^	Name	Date modified	Туре	Size		
OneDrive - CalMH	🙆 build	4/9/2023 5:43 PM	3D Object	3 KB		
	RDLCalMHSAProgramTest2.rdl	4/9/2023 5:43 PM	RDL File	24 KB		
This PC	RDLCalMHSATrainingReport2023_07_01.rdl	4/9/2023 4:36 PM	RDL File	25 KB		
🧊 3D Objects	Streamline.rds	3/20/2023 5:14 PM	RDS File	1 KB		
📃 Desktop						
Documents						
🖶 Downloads						
b Music						
Pictures						
Videos						
Windows (C:)						
Network						

- 2. Log into SmartCare PROD and Create New report or folder (if necessary)
- 3. In the form search, choose Reports (Administration)

Q ★ 🔁 🚢	
Q reports	
S Reports (Administration)	
S Reports (Client)	
R CoreStandardReports (Folder) (My Office)	
S Incident Reports (My Office)	.ast `

4. Click on the **New** icon to create a new report

	☆ ¥ 7 🕞 ☆ 🛪
	Apply Filter
erver Path	

5. Enter the **Report Name, description,** choose the **Report Server** and then choose the report from the **Report Server Path** field

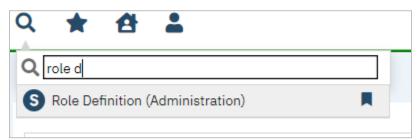
Note – If the report is meant to be a single client report where the user must choose a client prior to opening the report, choose **Client** in the **Associated With** field

Report Detail			
Report Name	CalMHSA Client Programs Report Test		- Fold
Parent Folder	All Folders	Add as Banner	
Description	This is a test report to display Client Programs for a data range		
Associated With		~	
Report Server	CalMHSASmartcareTrain Report Server	~	
Report Server Path	/Train/SCDocuments/RDLCalMHSAClientPrograms	~	

6. Click **Save** in the upper right corner when complete

#### How to Add Report to User Roles

1. To enable users to access the new report, the applicable user roles must be modified by selecting **Role Definition (Administration)** 



2. Select the role in the Roles window

Roles			Export Staff Roles	Add Role	Permission l	Jtilities		
Admin/Reception/II Adolescent Patient Billing Calt/HSA SysAdmin Care Coordinator CCM Claim Manager Clinical Supervisor Clinica	Portal				Copy permission Remove permission	CalMHSA SysAdmin Is from one role to selecte sions from selected role access to selected role	d role	
Default Permission Reports	s for Selected	Role Select Parent	~	All	▼ Permissi	on Item calmhsa	¢	Apply Filte Grant All Deny A
			Permission Item				Not Allowed	Granted
Permission Type	Parent							

- 3. Choose **Reports** from the left most field in the **Default Permissions for Selected Role** area. Once the report is visible, click on **Granted** instead of Deny. Click **Save** in the upper right corner when complete
- 4. Note You can narrow the selections by entering the name of the report in the **Permission Item** field and then click on **Apply Filter**
- 3. Add to User Roles