Service Reports

How To

Generate Service Reports in EI-Hub's Case Management module.

Roles listed below could be frequent users of various Service Reports:

- **Early Intervention Officials/Designees (EIO/D)**
- **Municipal Data Entry Staff**
- **Municipal Quality Assurance Staff**
- **Provider Users**

9/30/2022

PUBLIC CONSULTING GROUP

Solutions that Matter

Service Reports
Job Aid

HOW TO

Generate Service Reports from EI-Hub's Case Management module

NOTE

- Screen captures may not reflect the system's current state and will be updated accordingly.
- Public Consulting Group, Inc. will offer post go-live support via the PCG Help Desk at (877) 522-1065.

ABOUT SERVICE REPORTS

- Service Reports are located within the Child menu and the Reports submenu of EI-Hub's Case Management module. These reports can be customized to meet the user's needs. For example, you can run a report to view children with details of services rendered and how many services were rendered over a specific time period.

- Service Reports can be filtered and exported to Excel.

Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.
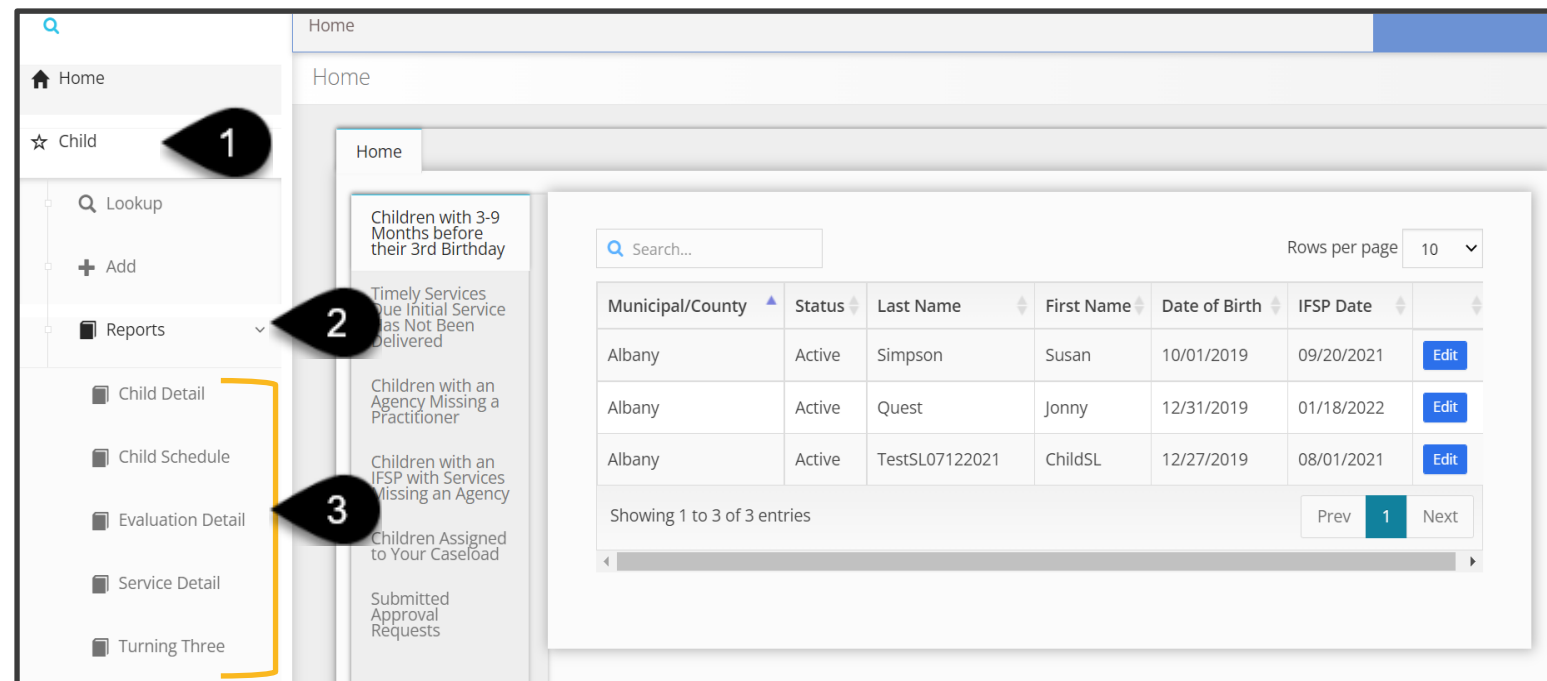
Service Reports
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HOW TO

Access Service Reports from EI-Hub's Case Management module. Visibility of reports may depend upon user role.

Step/Action

1. Select the **Child** menu from **EI-Hub Case Management's** Home page.

2. Select the **Reports** submenu. The **Reports** submenu expands listing all available reports.

3. Select the report you wish to generate (e.g., Child Details report, Evaluation Detail report)

4. The **Report** pane populates. The appearance of the Report panes differs based on the report selected. Different Report panes are shown throughout this job aid.

Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.

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Job Aid

🔍 **HOW TO**

Describe the types of Service Reports

ℹ️ **NOTE**

- The Child Schedule Report will be phased out in future renditions of EI-Hub and will not be addressed in this job aid.

Report Types

1. **Child Detail Report:** focuses on information reportable at a child-specific level. This report is considered a canned (pre-built) report. If you're searching for children residing in a particular town or children associated with specific primary guardians, this is the ideal report.

2. **Evaluation Detail Report:** focuses on information reportable at an evaluation-specific level. For example, if you're seeking a list of evaluation requests or wish to view evaluations performed during a specified period, this is the ideal report.

3. **Service Detail Report:** focuses on information reportable at a service detail-level. For example, a report can be generated listing service details for filtered Children (i.e., how many times those services are rendered over a specific period).

4. **Turning Three Report**: captures all the children within nine (9) months of their 3rd birthday. This report helps you to identify which children should start the transition process.
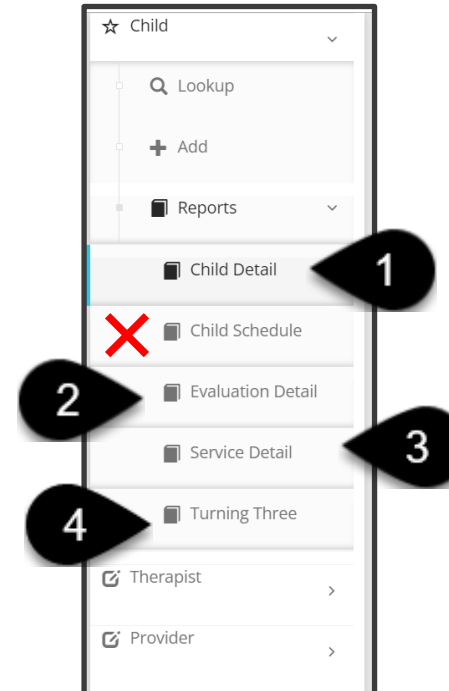
Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.
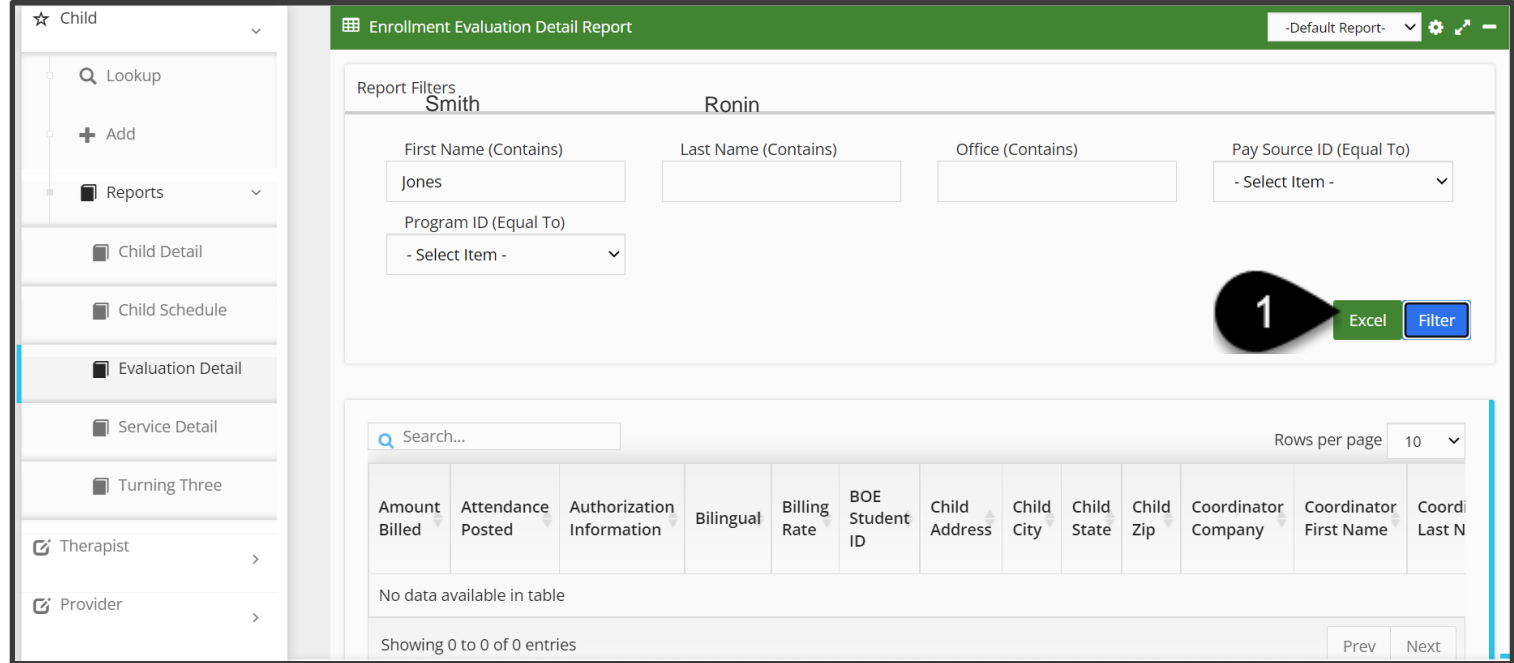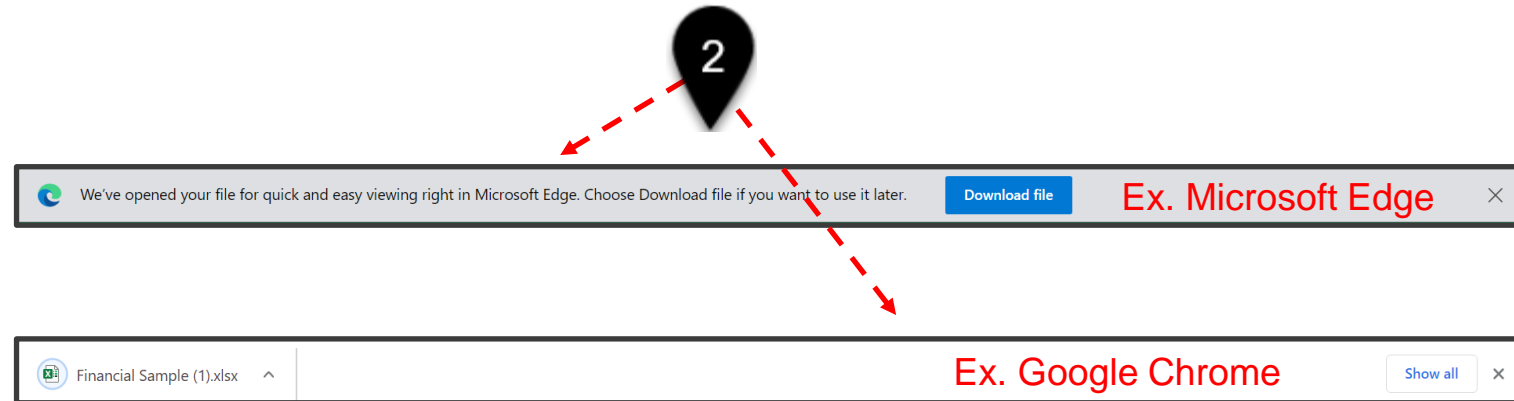
Service Reports
Job Aid

HOW TO

Export Service Reports from EI-Hub's Case Management module

NOTE

After a search criteria is entered in the **Report Filters** fields. Each report will provide options to conduct a search, filter, and export your results into an Excel spreadsheet. Please follow the steps/actions below to export your search results into an Excel spreadsheet

Step/Action

1. Select the **Excel** button.

2. A pop-up box will appear either at the top or at the bottom of your browser.

Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.

Child

Lookup

Add

Reports

Child Detail

Child Schedule

Evaluation Detail

Service Detail

Turning Three

Therapist

Provider

Enrollment Evaluation Detail Report

-Default Report-

Report Filters
Smith   Ronin

First Name (Contains)	Last Name (Contains)	Office (Contains)	Pay Source ID (Equal To)
Jones			- Select Item -

Program ID (Equal To)
- Select Item -

Excel   Filter

Search...   Rows per page 10

Amount Billed	Attendance Posted	Authorization Information	Bilingual	Billing Rate	BOE Student ID	Child Address	Child City	Child State	Child Zip	Coordinator Company	Coordinator First Name	Coordi Last N

No data available in table

Showing 0 to 0 of 0 entries   Prev   Next

We've opened your file for quick and easy viewing right in Microsoft Edge. Choose Download file if you want to use it later.   **Download file**   Ex. Microsoft Edge

Financial Sample (1).xlsx   Ex. Google Chrome   Show all

Service Reports
Job Aid

🔍 HOW TO

Export Service Reports from EI-Hub's Case Management module

Step/Action

1. Once the Excel spreadsheet is open, for some users, a **Protected View** message may appear at the top of your spreadsheet. Select the **Enable Editing** button located on the **Protected View** message to ensure you can edit the spreadsheet.

Please refer to the EI-Hub Case Management User Guide Unit 8. Child for more information.
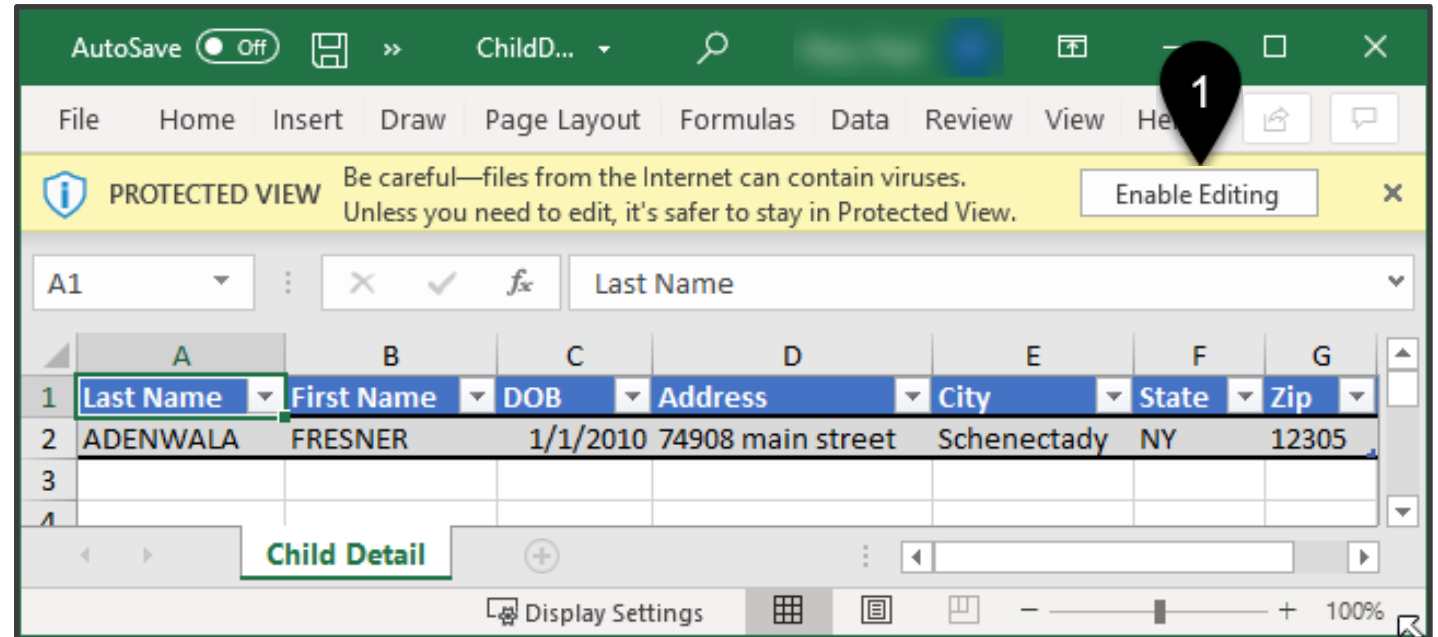
Revision History

Version Number	Release Date	Author	Revision Summary
v.1	3.30.2022	Courtney Pittman	First Draft Release
v.2	7.4.2022	Courtney Pittman	Second Draft Release
v.3	7.19.2022	Courtney Pittman	Third Draft Release
v.4	8.4.2022	Courtney Pittman	Fourth Draft Release
v.5	9.7.2022	Courtney Pittman	Fifth Draft Release
v. 6	9.28.2022	Courtney Pittman	Sixth Draft Release