ROUTINE REPORTS

WEEKLY, MONTHLY & QUARTERLY

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> 🔥 **Description**
>
> The following tables contain the *weekly*, *monthly* and *quarterly* reports that must be routinely generated. The name of the report, the frequency as well as purpose, source data location and data destinations are all listed. Links to tutorials on how to generate each report are also included.
>
> For detailed tutorials on how to complete each report, please see the manual on the master drive.

1. Weekly Reports

Report	Frequency	Purpose	Source Data Location	Data Destination	Int vs Ext
ASEBA Score Refresh	Weekly	Pulls ASEBA calculated scores for BI dashboard stats	ASEBA website	Master	Internal
Program History Refresh	Weekly	Updates client information, status and program information to the BI dashboard	EMHware - Detailed Program History and Client Data report	Master	Internal
Schoolboard Data Refresh	Weekly	Updates school and school board related info to the dashboard	EMHware - Educational School Status Custom report	Master	Internal
Closing Summary Refresh	Weekly	Pulls closing summary information to dashboard	EMHware - Case Data Data Extract in Column Format report	Master	Internal
ChyMH Data Refresh	Weekly	Pulls interRAI chymh and screener results to dashboard	EMHware - interRAI ChYMH Reports	Master	Internal
Unauthenticated ChYMHs Audit	Weekly	Pulls non-authenticated chymh info to dashboard	EMHware - interRAI ChYMH Reports	Master	Internal
Unauthenticated Records Audit	Weekly	Pull a list of all unauthenticated records by client and worker	EMHware - Records Audit Report	Master	Internal
Time Entry Refresh	Weekly	Pulls clinical time entry data	EMHware - Detailed Contacts by Activity Custom Report	Master	Internal
BI Dash Action Log	Weekly	Refreshes pull date in BI dash	Master	Master	Internal
Power BI Dash Refresh	Weekly	This will refresh the BI dashboard to reflect the new weekly data	Master	Master	Internal

2. Monthly Reports

Report	Frequency	Purpose	Source Data Location	Data Destination	Int vs Ext	Report to be sent to
Case Review & Psych Consult	Monthly	List of complex cases that may benefit from a psychological consult	EMHware & Master Drive	server	Internal	Alana Jackson, Nicholas Schwabe, Michelle Gauthier and all clinical managers
Training Feedback Dashboard	Monthly	Refreshes the training feedback BI dashboard	Survey Monkey	server	Internal	Subscription sent out via powerBI dash
Staff Focused Audits	Monthly	Staff focused audits	Emhware File Audit Report and Reference Table	computer	Internal	Supervisors

3. Quarterly Reports

Report	Frequency	Purpose	Source Data Location	Data Destination	Int vs Ext	Report to be sent to
OPOC Extract	Quarterly	Pulls client satisfaction data from OPOC server	BI Solution Website	Master	Internal	NA
Section 34 Quarterlies	Quarterly	Provides counts of Section 34 assessments coordinated via Compass	Asana: Section 34	Asana: Section 34 Task	Internal	NA
CCN Wait List	Quarterly	Pulls case coordination wait list data	EMHware	Master	Internal	Director of Clinical & Client Services & Michelle Gauthier
FRIENDS Quarterly Report	Quarterly	Pulls and sends FRIENDS group data to licensing agency	Lise Longchamp	Master	External	Friends Organization
SAP Data for Board Report	Quarterly	Pulls supervision data for bi-annual reporting	iSaid	Asana: SAP Task	Internal	NA
BI Quarterly Submission	Quarterly	Mandatory reporting of programs funded by the Ministry	EMHware	Lead Agency and Ministry Site	External	NA
BI Data Quality Reports	Quarterly	Investigates data quality before BI submission	EMHware	Admin Assistants	Internal	Tracy Bracken
Targets & Interim Actuals MOH Report	Quarterly	Mandatory Bi-Annual reporting of KPIs	EMHware and Master Drive	Master	Internal	Nicholas Schwabe
CCA Accreditation Audits	Quarterly	Accreditation audits	Emhware File Audit Report and Reference Table	EMHware - supervision accounts	Internal	Supervisors