Office of Clinical Research

CTMS Reference Guide
Report Building

Reports

Reports

Reports Overview

The Reports module provides you with the ability to quickly create and edit reports based on data stored CTMS. Once the basic structures of a report has been specified, it can be run, edited, saved, copied, and made available in the Reports, Studies, and Patients module. Furthermore, report results can be exported directly to Excel.

The Reports module allows users to view and edit existing reports, create new reports, and export all reports to Excel.

How to Generate an Existing Report

1. Go to the Reports module.
2. In Custom Reports, select report from dropdown and click View Report.
3. Click on the green Excel icon to export the report to Microsoft Excel.

How to Create a New Report

1. Go to the Reports module.
2. In Custom Reports, click on Add Report.
3. Name the report.
4. Select necessary fields to add to report.
    a. Please refer below for details on how to add fields and filters to reports.
5. Click the Run Without Saving or the Run & Save button.
    a. Running a report without saving will allow users to generate the data in the report and export the data to Excel, but the report will not be available in the Reports dropdown for future use.
    b. Running and saving a report will allow users to generate the data in the report and Export the data to Excel. The report will also be available in the Reports dropdown for future use.

The **Add Report** screen is designed to allow you to quickly build custom reports. It will open in a new window when you click the icon.

The top of the Add Report window includes several important fields:

- **Report Name** – The report name is a required field and will display in the drop-down list of reports in the main Custom Reports screen.

- **Report Description** - This provides a brief explanation of a report and its intended purpose. Descriptions are especially useful for reports that are being created for recurring usage by multiple users. If filters – for example, date ranges – need to be occasionally updated, a reminder can be included in the report description.

- **Show in Studies –** When selected, this option publishes a read-only version of the report to the Studies module. The report can be accessed by clicking on “Reports” menu within the Studies module the report is selected, its results will be exported automatically into an Excel spreadsheet.

- **Show in Patients –** When selected, this option publishes a read-only version of the report to the Patients module. The report can be accessed by clicking on “Reports” menu within the Patients module. When the report is selected, its results will be exported automatically into an Excel spreadsheet.

- **Note on Personnel Security –** Users with access to the Reports module have access to all of its reports contained within the module. Within the Reports module, access cannot be limited to specific sections, or to specific reports. Reserve access to the Reports module for only those users who should be privy to all the reports. For all other users, instead of allowing access to the Reports module, selectively publish read-only versions of specific reports to the Studies and/or Patients module.

Study Fields & Filters
After naming the report, the basic parameters of the report must be established, along with any additional variables. The type and number of fields and filters selected from the available sections will limit or expand the results of the report.

Sections are represented by horizontal orange bars. The first section, Core Fields, includes 8 fields considered to be the foundation of any report. Except for Core Fields, the 15 other sections can be expanded or collapsed by clicking anywhere on the horizontal orange bar.

Please note that not all sections and/or fields will be immediately visible and that some sections and/or fields are dependent on whether other fields are selected. This prevents data from overlapping or conflicting. For example, the **Patient Details section** will only appear once Patient field has been selected in the core fields section. Furthermore, once certain fields are selected, other fields will become unavailable. For example, if **Financial Items** is selected, the **Payables** fields are disabled.

In general, it is recommended to choose only the fields that are essential to for the desired report – there is a direct correlation between the complexity of a report and the time it takes for the report results to display.

Fields can either be selected to **Show** or **Filter Only**.

- **Show** – If selected, the corresponding field will be displayed within the report results. For example, if “show” is selected for **Providers**, then that field will display as a column heading and the names of Providers will be included under that column within the report results. Additionally, filters can be used as needed. If fewer than all Providers are desired within the report results, filter for just one Provider or for specific Providers.

- **Filter Only –** If selected, the corresponding field will not display within the report results, but could still be used for filtering purposes only. For example, if “filter only” is selected for Providers, a Provider can be specified, and results will be limited to items related to the specified Provider, but “Provider” will not appear as a column within the report results.

Of the 8 available core fields, either **StudyID** or **Site ID/Name** must be included. Filter Only is not an option for either the StudyID or the SiteID/ Name field. It is recommended that you specify which studies and/or sites to include on your report. To view all options, click on the orange arrows in the **Filter** column.

- **Specific Selections** – Select one or several studies by checking the appropriate checkbox(es).
- **Select All** – This will select all studies in the pick-list. Note: This is not the same as **All Studies**
- **Select None –** Unselects all selected studies in the pick-list.
- **All Studies** – Includes all studies to which you have access. If another user runs a report – whether from the Reports, Studies, or Patients module – and “All Studies” are included, the report results will only include studies to which that user has access.

In additional to **Show** and **Filter only**, several fields include options for advanced filtering. For example, if **Financial Items** are selected, a filter with a dropdown list and a text box appears.

Operators on the dropdown menu include:
- **= “Equal To”**
- **<>“Not Equal To”**
- **>“Greater Than”**

- **< "Less Than"**
- **Between** – Use this option to filter for items that occur within a specific date range
- **Starts With** – Enter the first few characters of the desired value. In the example above, after the "Starts With" operator, the characters "IRB" could be entered in order for the report results to include only Financial Items that start with "IRB" (e.g., IRB Initial Review Fee, IRB Amendment Fee, etc.)
- **Contains** – Enter characters contained within the desired value or create a series of desired values using the vertical bar character as a separator. In the example above, after the "Contains" operator, entering "IRB|Reg" would result in the inclusion of only Financial Items that contained either the characters "IRB" or the characters "Reg" (e.g., IRB Initial Review, IRB Amendment Fee, Local IRB Submission, Annual Regulatory Review, etc.)

Other Sections

As noted, the population and/or availability of other reporting sections, and the fields within those sections are dependent on which core fields are selected. Below are a list of all of the sections, including important distinctions and notes. Please note that each section contains a number of related fields, and not all fields are shown or specifically described below.

- **Study Definition –** Includes fields that are available on the study definition screen in the Studies module (e.g., Protocol Number, Study Phase, Drug, and Title).

- **Study Custom Fields –** Includes any Study and Personnel Custom Fields that have been added to Merge CTMS. Study and Personnel Custom Fields are user-created and are accessed in the Studies module's Study Custom Fields screen and Personnel Module in the Personnel Custom Fields tab of the users' profiles. If the Study ID core field is de-selected, the Study Custom Field section becomes unavailable.

- **Study Personnel –** Includes fields related to information for study personnel (e.g., Study Role and Study Creator.) If the Study ID core field is de-selected, the Study Personnel section becomes unavailable.

- **Financial Accruals –** Includes all of the main financial fields (e.g., Accrued, Receivable, and Paid).

  ➢ **Note:** Financial transactions generated by visit and/or procedure activity don't necessarily have Transaction Dates that coincide with either the Visit Date or the Procedure Date. For example, a procedure that occurred last week which is entered today will have a Transaction Date of today. Filter on Transaction Date in order to report on activities **entered** within a specified timeframe. In order to report on date of service, filter on Visit Date and/or Procedure Date, in the Patient Details section, instead.

- **Financial Aging** – Includes AR aging fields. Receivables are aged based on their Transaction (i.e., entry) Dates. If the Study ID core field is de-selected, the Financial Aging section becomes unavailable.

- **Financial Payables** – Includes fields related to Payables (e.g., Payable Amount and Payable Account Code). The Payables core field must be selected in order for the Financial Payables section to appear.

- **Patient Status Counts (Current)** – Includes fields for reporting counts of study patients' according to their current statuses. For example, if a study patient is "Randomized", that patient will be counted just once, in under the "Randomized" column.

- **Patient Status Counts (History) –** Includes fields for reporting counts of study patients' status histories. For example, if a study patient is "Randomized", but was previously "Screening", that patient will be counted twice, once under the "Screening" column and also under the "Randomized" column.

- **Visit Checklist** – Includes fields for reporting completed and incomplete procedures.

- **Patient Details –** Includes fields directly related to the patient (e.g., Patient ID, Birth Date, and Gender). The Patients core field must be selected in order for the Patient Details section to appear.

- **Study Visit Details –** Includes fields for displaying or identifying specific visits (e.g., Visit Number and Visit Name.) The Study ID and Visit # / Name core fields must be selected in order for the Study Visit Details section to appear.

- **Patient Interactions –** Includes fields related to Patient Interactions (e.g., Interaction Text, Interaction Date/Time, and Interaction Flag. The Patient core field must be selected in order for the Patient Interactions section to appear. Adding Study ID to the report will restrict the Patient Interactions to only those patients who have been enrolled into a study.

- **Study Recruitment Sources –** Includes fields for reporting on Recruitment Sources that are assigned to Studies and/or the counts of patients that are enrolled with those Recruitment Sources (i.e., the Recruitment Source selected at the point of enrollment.)

- **Scheduling –** Includes fields for reporting on information related to Appointments (e.g., Appointment Provider, Appointment Date, and Appointment Status.) If the Provider core field is selected, the Scheduling section becomes unavailable. If the Study ID core field is selected, patients who have never enrolled into a study will be excluded from the report results.

- **Checks –** Includes fields for reporting on information related to Checks (e.g., Check Number, Check Amount, Check Received Date, and Check Notes). There are two criteria for the Checks section to appear: either the Financial Items core field must be selected or the Site ID / Name core field must be de-selected.

Running Reports
Once you have selected all of the fields appropriate for the report, you can generate the report by clicking on either **Run Without Saving** or **Run & Save** at the bottom of the screen.

- **Run Without Saving** – View report results needed for one-time use only. Note that the report parameters are not saved for future use. However, after the report is run, it can still be edited and saved, both of which must be done during the same session and before navigating to any other modules.
- **Run & Save** – This will run and save the report, and if applicable, will also publish the report to the Studies and/or Patients module (if these options were selected in the header).

Once either option is selected, the results of the report will display on the main reporting screen. The displayed report will indicate the total number of rows and pages. Navigating from page to page can either be done by using the directional arrows, or simply typing in the page number. Furthermore, it is possible to edit the report and/or export the results of the report to Excel.

To edit the report, click **Edit Report**.

To export the results to Excel, select the **Excel icon** .

- **Note:** If there are more than 20,000 rows in the resulting report, the export to Excel icon will be disabled.

Copying a Report

Furthermore, a report can be copied. This feature is particularly useful if a report needs to be created that only has minor variance from a previously existing report.

To copy a report, select it from the dropdown list and then select the **Copy** icon .

The copied report will appear below the original report with a number at the end of the report name. For example, if the report “Account Summary” is copied, the copied report will appear as “Account Summary (1).” After a report has been copied, it can be run and edited accordingly.

Deleting a Report

To delete a report, select the icon next to the desired report. After selecting next to the desired report, confirm the action by selecting OK.

- Note: Once a report has been deleted, this action cannot be reversed.

Backlog

Based on the Visit Specific Items tab of each Study’s Budget, the value of the Pending and Scheduled Visits is calculated in the Reports module screen called Backlog. Results in the Backlog screen are shown month-by-month for 12 months and the Study filter can be used to include all or only selected Studies within the results.

How to Create a Backlog Report

1. Go to the Reports module.
2. Select the Backlog Tab.
3. Search for studies to add to report in “Search for Studies” by typing in the StudyID or clicking the arrow to expand the box to show all studies.
4. Select the studies to add to the report by selecting the icon next to each study name or by selecting “Add All.”
5. Select the “View Backlog” button.
6. To export the results to Excel, select the Excel icon