



Reports – FSC Job Aid

The *Reports* screen allows users to generate reports based on the data that has been entered into Synergy – FSC. Reports can be generated as an Excel spreadsheet or (for some Reports) a PDF.

Reports

1. Each Report has options for customization. Once all of the criteria for the Report have been selected, the Report can be generated by clicking **Show Report**.
2. The Report will open in a new browser window or tab.

Important Reminder: *Some browsers may automatically download the report. Please be aware of this and remember that these documents should not be saved to personal or public computers as this is a violation of HIPPA Regulations.*

3. Working with Microsoft Excel Reports: Some Reports may be in Excel format. Excel allows users to sort and filter data to further tailor the report to the user's specific needs.
 - a. Microsoft provides quick start guides and video training for Excel and other Microsoft products here:
 - i. Microsoft Office Quick Start Guides: <http://aka.ms/office-2016-guides>
 - ii. Microsoft Office Video Tutorials: <http://aka.ms/office-2016-training>

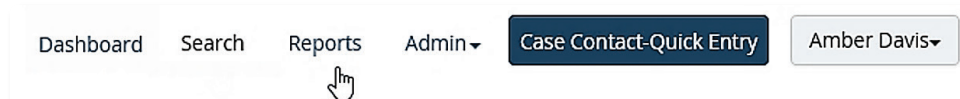
These Microsoft Training videos may be particularly helpful when working with Synergy Excel Reports:

[Sort data in a table](#)

[Filter data in a table](#)

Navigation

1. The **Reports** static navigation button can be found at the top of every screen.





Reports: Roster Report

1. **Report Selection** pane: Select "Roster Report" from the *Reports* drop-down.

Report Selection

Reports: Roster Report

2. **Report Criteria** pane: Select specific criteria to apply to the Report.

Report Criteria

Provider * **A**: Family Resources

Facility * **B**: None selected

As of Date * **C**: [Empty]

Report Type * **D**: -Select-

Enrollment Status **E**: None selected

Home Visiting Status **F**: None selected

Assigned Worker **G**: None selected

Show Report

- a. *Provider*: This field is read-only and will display the provider that the logged-in user is associated with.
- b. *Facility*: For most users, this will display the name of the facility/location that the logged-in user is associated with.
 - i. Managers will be able to select one or more facilities using the multi-select drop-down. To view information from all facilities, check the ☒ *Select All* checkbox.

Facility *

None selected

☐ Select all

☐ FAMILY RESOURCES - 1....

☐ FR 134 S. HIGHLAND A....

- c. *As of Date*: Enter an end date for the Report to see all information up to that date.
- d. *Report Type*: Select the report format of Excel or PDF from the drop-down.
 - i. Excel format allows users to filter and sort the Report for further customization.
 - ii. PDF format is read-only but is more print-friendly.
- e. *Enrollment Status*: Use the multi-select drop-down to select one or more specific statuses. Leaving this drop-down blank will give the widest pool of results.



- f. **Home Visiting Status:** Use the multi-select drop-down to select one or more specific statuses. Leaving this drop-down blank will give the widest pool of results.
- g. **Assigned Worker:** Use the multi-select drop-down to select one or more workers. This drop-down will only display workers assigned to the facility or facilities selected in the *Facility* field. By selecting a specific worker or set of workers, the Report will be limited to information specific to the Cases of the selected worker(s).

3. Click [Show Report](#). The Report will open in a new browser window or tab.

Note: If the *Enrollment Status*, *Home Visiting Status*, or *Assigned Worker* drop-downs are left blank the Report will include all of that field's drop-down options. A word of caution when using the filters; if the report is filtered to conflicting statuses, for example if "Enrolled" is not selected under *Enrollment Status* but is selected under *Home Visiting Status*, then the report will be blank.

4. Reviewing the Report:

From Date : To Date :

Family Name	Family ID	Enrollment Status	Enrollment Status Date	Home Visiting Status	Home Visiting Status Date	Assigned Worker	Family Member ID	First Name	Last Name	Role	DOB	Age	Relationship to HoH	Family Address	Phone Number	Email	Referral Source	Last Contact Date
AIU - MCKEESPORT FAMILY CENTER																		
Alligator	4863	Pending	6/15/17	Pending			1000862896	Mom	Alligator	Adult	2/2/85	32	Self	123 Client St Pittsburgh, PA 15132	7777777777		Link	
Alligator	4863	Pending	6/15/17	Pending			1000862897	Baby	Alligator	Child	1/1/16	1	Son				Link	
Alligator	6503	Enrolled	6/15/17				1000862896	Mom	Alligator	Teen Parent	2/2/85	32	Self	123 Client St Pittsburgh, PA 15132	7777777777		Link	
Apple	1539	Enrolled	4/19/17			Tawnya Zemka	1000860156	Rad	Apple	Teen Parent	1/1/99	18	Self	1 Smithfield St PA 15222	1246542412		FSC	4/9/17
Apple	1539	Enrolled	4/19/17			Tawnya Zemka	1000860251	Grandma	Apple		12/12/50	66					FSC	4/9/17
Apple	1539	Enrolled	4/19/17			Tawnya Zemka	1000860162	Daddy	Apple	Adult	1/1/78	39	Parent				FSC	4/9/17
Apple	1539	Enrolled	4/19/17			Tawnya Zemka	1000860192	Green	Apple		2/2/79	38					FSC	4/9/17
Apple	1539	Enrolled	4/19/17			Tawnya Zemka	1000860190	Baby	Apple	Child	3/1/17	0	Daughter				FSC	4/9/17

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- a. Reports are automatically sorted by *Facility* and then by *Family Name* in alphabetical order.
- b. Reports will have an *As of* date at the top indicating the date cut-off that was selected before generating the Report. The date listed as *up-to-date* indicates the latest date the information was refreshed. For example, if the data is up-to-date as of yesterday, any information entered by users today will not be included in the report.
- c. The date and time that the Report was generated from Synergy will be listed at the bottom of the Report.
- d. The report also includes Monthly Enrollment Report data. This can be found on a separate tab in Excel labeled OCDEL (Office of Child Development and Early Learning) or at the bottom of the Report if it is a PDF.
- e. Blank fields in the Report indicate that no information was entered in Synergy for that item. For example: If the Client's address has not been entered, the Family Address column for that Client will be empty.



Reports: Case Contact Report

1. **Report Selection** pane: Select "Case Contact Report" from the *Reports* drop-down.

2. **Report Criteria** pane: Select specific criteria to apply to the Report.

- a. *Provider*: This field is read-only and will display the provider that the logged-in user is associated with.
 - b. *Facility*: For most users, this will display the name of the facility/location that the logged-in user is associated with.
 - i. Managers will be able to select from all of the FSC facilities associated with the Provider. Only one facility can be selected at a time.
 - c. *Start Date* and *End Date*: Entering a date range allows the Report to be filtered down to a specific time period. Leaving the date fields blank will cause the Report to display all Case Contacts for the selected facility.
3. Click **Show Report**. The Report will open in a new browser window or tab. The Report will be in Microsoft Excel file format.

For more information...

For assistance, please contact the FSC Specialists at Synergy-FamilySupportCenter@AlleghenyCounty.US or the Allegheny County Service Desk at ServiceDesk@AlleghenyCounty.US or call 412-350-HELP (4357). Select Option 2 for the DHS Service Desk.

To access iService, go to: <https://servicedesk.alleghenycounty.us>

This and other Job Aids can be found at: <http://s3.amazonaws.com/dhs-application-support/index.htm>