

SAMS Report Template Name: NAPIS Consumer Listing

Common Use: View missing client demographic information

NOTE: Only save reports in the SAMS system if you plan to access them often. Be cognizant of printing this report or saving it on an unsecured electronic device, as it will contain confidential client information.

Details Section:

Add a title to the report.

If you plan to save the file and don't want others to see it, change the "Shared With" drop down to None, or select another option if desired.

Report Settings Section:

Choose which "Columns for Consumers" you want visible on your report. Click on the folder icon to open the dialog box which will give you the column options. Home-delivered meal programs should select all demographic options. Congregate meal programs should select all demographic options except ADLs and IADLs. Other types of programs should choose all except High Nutritional Risk.

If you plan to run one report for multiple services, you may want to change the "Group By" drop down to Service if it would be helpful to have client info by service. If you have clients in multiple programs, it may be more helpful to leave that drop down as No Grouping to avoid duplicating client info on the report.

Change "Sort By" to Last Name.

Change "Include Consumer Groups" to No.

Change "Only show consumers with missing data?" to Yes.

For a total of missing demographics by column, change "Display Missing Totals" to Show.

Service Delivery Section:

Enter the start and end dates of the reporting period.

Choose your organization as the Provider. (Click on the folder icon)

If you want to choose a specific service, choose it in the Service dialog box. (Click on the folder icon)

(e.g. NAPIS – Adult Day Care; RDO – Homemaker; NAPIS MF – Volunteer Care, etc.)

Save the file, if desired (see note at top).

Click Preview  to open the report in your web browser as a PDF or choose an option from the drop-down menu. Depending on the amount of data SAMS has to pull, it may take a few minutes for the report to load.

Missing elements, by client, will be blank or will be represented with a dash (-) on the report.