

Common Queries

Overview

Q has many different reports that you can use for different tasks. In order to get the results that you want, it is important to start with the right report. Here is a brief explanation of the different reports:

Report Name	Results	Unduplicated clients?	Care plan details?	Inactive clients?
Clients with Active Care Plans	List of client records for clients who have active care plans matching the query criteria	Yes	No	No
Clients with Service Units by Time Interval	List of client records for clients who have one or more delivered service units matching the query criteria	Yes	No	Yes
Clients Receiving Service (Detailed)	List of service plan records matching the query criteria	No	Yes	No
Service Units Entered vs. Authorized	List of service plan records matching the query criteria and an aggregate total of authorized and delivered units for the month	No	Yes	Yes
Service Units in a Date Range	List of service unit records matching the query criteria	No	Yes	Yes

Details on each of these reports are included in the following pages.

Clients with Active Care Plans

Overview

Q queries for **active clients** who have a care (service) plans that match the criteria entered. The results will be a list of **unduplicated** client records.

Common use(s)

- Reporting client demographics for clients who are receiving particular service(s.)
- Reviewing active “roster” and removing clients from it.

Query criteria

Required fields are marked with an (*) asterisk.

In the example above, Q will find any client who has a care plan for personal care OR chore OR homemaker services from Home Care Specialists agency. Q filters the results by care plan dates; Clients whose care plan start date is AFTER 7/1/06 or whose end date is BEFORE 7/1/06 will be filtered out.

Results

Clients with Active Care Plans - Services: Personal Care, Chore, Hom					
Name	Age	Race	Sex	Low Income	Lives Alone
Jones, Grace	83	African American	Female		Yes
Taylor, Elizabeth	74	White		Yes	Yes
Eastwood, Clint	76	White	Male	Yes	Yes

Grace Jones appears once even though she has two matching care plans for Home Care Specialists: one for Personal Care and one for Chore.

Accessible table(s): Client record (**No** automatic access to service plans.)

Special Functions: Care Plan Mass Creation

Q: Why can't I see the matching service plans that Q found?

A: The purpose of this report is to display an unduplicated list of clients. Since one client may have many matching care plans, Q is unable to display care plan details for care plans without listing the client more than once. To view service plan details, open the client record (double-click) and click his/her **care plan** button. Consider using the “Clients Receiving Service (Detailed)” query if you would like to view care plan details such as Start Date and End Date.

Clients with Service Units by Time Interval

Overview Q queries for **clients** (active, inactive or both) who have at least one (delivered) service unit record that matches the criteria entered. The results will be a list of **unduplicated** client records.

- Common use(s)**
- Verifying client totals on quarterly (SPR) reports
 - Reporting unduplicated client demographics for a particular service category.

Query criteria

Services (one / many / all)
 Agencies (one / many / all)
 Start Date & End Date*: Service unit "Date of Service" must fall between these two dates.
 Active*: client record status: active, inactive or both.
 Funding Sources (one / many / all)
 (Meal) Sites (one / many / all)

Required fields are marked with an (*) asterisk.

In the example above, Q will look for all clients who have at least one unit of delivered congregare meals recorded on his/her care plan with service dates between 7/1/06 and 6/30/07. (Please note that you may enter a future date.) It will not filter by agency or funding source or meal site.

Results

Clients Receiving Service Units Services: Congregate Meal				
Name	Month of Birth	Race	Low Income	Age
Beatty, Warren	March	White	No	69
Becall, Lauren	September	White	Yes	82

Accessible table(s): Client record (**No** automatic access to service plans.)

Special Functions: Care Plan Mass Creation

Clients Receiving Service (Detailed)

Overview Q queries for **care (service) plans** for active clients that match the criteria entered. The results will be one row for every matching care plan. This is NOT an unduplicated clients query.

- Common use(s)**
- Viewing current service “roster.”
 - Disenrolling all care plans at once

Query criteria

Services (one / many / all)

Agencies (one / many / all)

Funding Sources (one / many / all)

Start Date & End Date*: The care plan must have been active at least one day in this date range

Required fields are marked with an (*) asterisk.

In the example above, Q will find any care plan where the service is Personal Care OR Chore OR Homemaker. It will NOT filter by agency or funding source. It will only find care plans that were active at least one day in the first quarter of FY06-07.

Results

Clients Receiving Services Services: Personal Care, Chore, Homemaker				
Agency	Service	Client: Name	Start Date	End Date
Home Care Specialists	Homemaker	Montalban, Ricardo	11/1/2005	7/6/2006
A Warm Embrace	Personal Care	Montalban, Ricardo	9/30/2006	

Accessible table(s): Service plan record and Client record (right-click on name)

Special Functions: Mass Disenroll and Mass Copy

Service Units Entered vs. Authorized

Overview

Q queries for **care plans** that match the criteria entered for active and inactive clients. One row will be displayed for each active care plan found, even if there are zero authorized and zero delivered. It displays the total number of service units entered and authorized recorded on each care plan.

Common use(s)

- Reporting monthly service unit totals for a particular agency in a single month.
- Identifying clients who are on a roster, but NOT receiving service

Query criteria

The report indicates for the month entered the number of units authorized to the client for that month (based on either the Monthly Amounts function or the schedule in effect on the last day of the month) compared to the number of units actually delivered to the client.

Agency: Home Care Specialists
 Service:
 Month/Year: 07/2006 July, 2006
 Funding Sources: ...

Buttons: Query, Clear, Cancel

← Agency (one or all)
 ← Service (one or all)
 ← Month/Year*
 ← Funding Sources (one / many / all)

Required fields are marked with an (*) asterisk.

In the example above, Q will find all care plans for Home Care Specialist agency that were active during at least one day in the month of July 2006 and display the total number of units authorized and total units delivered for the month. If the client is receiving two different services from this agency, Q will display a row for both.

Results

Service Unit Entered vs. Authorized Report - Agency: Home Care Sp					
Client: Name	Service	Start Date	Units Authorized	Units Delivered	Units Authorized - Units
Montalban, Ricardo	Personal Care	7/1/2005	0.00	0.00	0.00
Montalban, Ricardo	Homemaker	11/1/2005	15.00	1.00	14.00

Accessible table(s): Service plan record (Double-click) and Client record (right-click on name)

Special Functions: None (However, you can mass disenroll by using the "Open Multiple Service Units Entered vs. Authorized" and changing the End Date for all.)

Service Units in a Date Range

- Overview** Q queries for **service unit records** matching the criteria entered for active and inactive clients. One row will be displayed for each service unit record found. Records with negative quantities will also be displayed.
- Common use(s)** • Reporting service unit totals and/or costs for specific services or agencies.
- Query criteria** Required fields are marked with an (*) asterisk.

In the example above, Q will look for all service unit records (delivered units) entered for Home Care Specialist agency for Personal Care OR Chore OR Homemaker service with service dates between 7/1/06 and 9/30/06.

Results

Service Units for All Agencies - All Funding Sources Services: Personal Care, Chore, Homema						
Agency	Service	Funding Source	Client	Date Service	Quantity	Agenc Total Cos
Home Care Specialists	Personal Care	LNK POS	Beatty, Warren	9/16/2006	4.00	\$86.00
Home Care Specialists	Personal Care	LNK POS	Beatty, Warren	9/17/2006	4.00	\$86.00
Home Care Specialists	Personal Care	LNK POS	Beatty, Warren	9/18/2006	4.00	\$86.00
Home Care Specialists	Personal Care	LNK POS	Beatty, Warren	9/18/2006	-4.00	(\$86.00)
Home Care Specialists	Personal Care	Title IIIB	Beatty, Warren	9/18/2006	20.00	\$430.00

Accessible table(s): Service Unit record and Client record (right-click on name)

Special Functions: None