Saving Reports from PBPS   https://waprev.onmosaix.com/waprevent2015/pEnter.aspx

Purpose:
This document provides step-by-step instructions for how to run and save reports from the Performance Based Prevention System (PBPS). It also includes a listing of common reports to run.

What are the benefits to saving reports from PBPS?
Once we end our contract with the company that runs PBPS, the site will be closed down and the information will no longer be accessible.

Reports you run from PBPS can provide you with:
- o Session information (date, topic, participants).
- o Event information (date, numbers reach).
- o Demographic information on participants.
- o Training information, including dates of training, number that attended, and costs.

What reports should I run and save?
There are a range of reports you can run from PBPS. The ones you will want to run and save will depend on what information you already have in your files about the about the programs and services that were provided, and how easily you can retrieve that information.

See step #3 on the next page for the listing of the categories of reports. Each category has reports within it. Common reports to consider running include:

Category:	Report Name
o Service:	Services by Activity Report (with Narrative).
o DBHR Report:	Training – CPTS Report.
o Outcome:	Outcome Report.
o Service:	Participant Demographics Report

NOTE: There may be other reports you will want to run. For example, there are several different reports for demographics. Remember, what reports you run will depend on what information you already have on file, and how easily you can retrieve that information.

How do I know which months and years I should run reports for?
See step #6 on the next page for selecting the date range of your reports.
The 2015-17 PBPS system has information from July 2015 to September 2016.
Services since October 2016 should be in the Minerva system.

Does it matter if I'm on a MAC or PC? What about the browser I use?
There are a many factors that will influence the options you see when generating reports in PBPS. Our recommendation is to run these reports using the Internet Explorer browser.

These instructions were based on using a PC and Internet Browser.

Saving Reports from PBPS

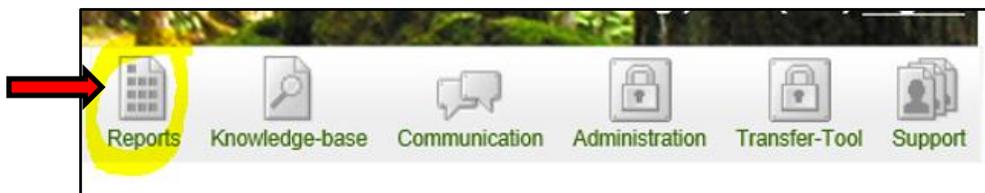## Follow these steps to run and save reports from PBPS:

Our recommendation is to run these reports using the Internet Explorer browser:

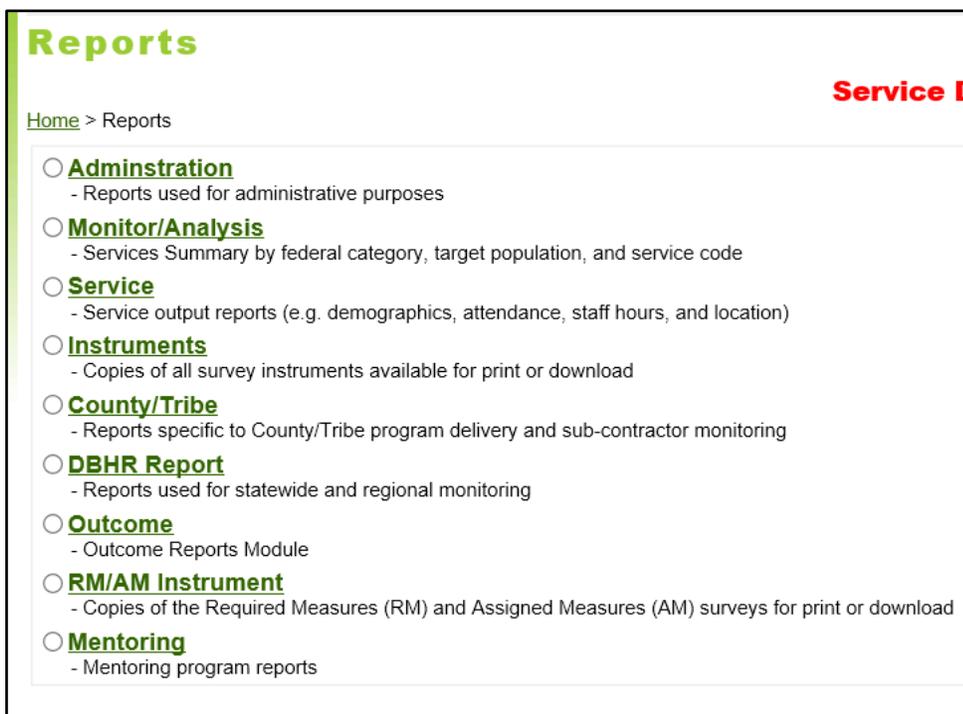☐ **1) Be sure you are signed in to PBPS and are in the 2015-17 system.**

☐ **2) Click on Reports icon.**

☐ **3) The Reports menu listing will appear.**

☐ **4) Select the category of reports.**

- Services Summary by federal category, target population, and service code

⊙ **Service**
   - Service output reports (e.g. demographics, attendance, staff hours, and location)

A listing of available reports will appear.

	Report Name	Report Description
Select	Assessment Pre-test Score Report	Generates average pretest score to every question in the instrument for each group
Select	Assessment Summary	Generates assessment totals for pre-tests, post-tests, follow ups, and participants for each instrument by group.
Select	DBHR Prevention Services by State Legislative District - Age	Generates a demographic age and gender breakdown of participants by legislative district and provider.
Select	DBHR Prevention Services by State Legislative District - Race	Generates a demographic race and ethnicity breakdown of participants by legislative district and provider.
Select	Group Service Summary	Generates distinct count of participants, no. of sessions, service hours (direct and indirect) for a group under a program of every provider.
Select	Mentoring Participant Demographics Report	Generates a sum and percentage of persons served under Mentoring Programs within a specified date range broken down by participant gender, age, race, and ethnicity. Calculates these totals for program, provider, and county.
Select	Participant Attendance Report	Generates the attendance records of specific clients by event with a breakdown of attendance and completion.
Select	Participant Demographics Report	Generates a sum and percentage of persons served within a specified date range broken down by participant gender, age, race, and ethnicity. Calculates these totals for program, provider, and county. Participants may be counted more than once if they attended multiple activities.
Select	Prevention Services by Goal	Displays Prevention goals and objectives served by every program within an organization.
Select	Recurring Service Demographics Report	Generates a demographic breakdown of recurring services by group, county, and state. Participants are non-duplicated counts.
Select	Services by Activity Report	Generates the detail of providers' services within a specified date range by program and group.
Select	Services by Activity Report (with Narrative)	Generates the detail of providers' services within a specified date range by program and group with an activity description.
Select	Services by Participant Report	Generates the detail of providers' services within a specified date range by client with number of sessions and hours.
Select	Services By School District	Generates summary of participants, service hours and service dates under every program in a school district/ location within every county.
Select	Services by Staff Report	Generates the detail of providers' services within a specified date range by staff member. Includes direct and indirect staff hours.
Select	Single Service Demographics Report	Generates a demographic breakdown of single services by program, provider, county, region, and state.
Select	Summary of Services by Service Code	Generates a summary of the prevention activities, service hours and other activities under every service code.

☐ **5) Select the specific report you wish to run.**

A screen will appear where you select the parameters of your report. The parameters that are available will vary, depending on which report you are running. In this example, "Service by Activity Report (with Narrative)" is selected.

Select New Report	

Services by Activity Report (with Narrative)   Generates the detail of providers' services within a specified date range by program and group with an activity description.

Time Period:	7/1/2015 - 6/30/2017 ⌄
Begin Date:	7/1/2015
End Date:	6/30/2017
Region:	1 ⌄
County/ Tribe:	201 -- Test Account ⌄
Provider:	All ⌄
Program:	All ⌄
Group:	All ⌄

Output To: ⊙ Report Service ○ PDF ○ Excel   **Show Report**

Click here for help if your PDF or Excel report is not appearing.

☐ **6) Select the parameters of your report. Choose "Excel" as the output.**

Begin Date:	7/1/2015
End Date:	6/30/2017
Region:	1 ▾
County/ Tribe:	201 -- Test Account ▾
Provider:	All ▾
Program:	201 -- Washington Community Coalition (WCC) ▾
Group:	All ▾

Output To: ○ Report Service ○ PDF ● Excel   **Show Report**

Click here for help if your PDF or Excel report is not appearing.

Helpful Hint - Some reports won't save with the Excel option. In those cases, select "Report Service" as the output, then at the top of the screen that appears, choose a file format to save the report.

☐ **7) Click the "Show Report" button.**   **Show Report**

If a new window does not appear, see if a menu bar like this appears towards the bottom of your screen:

Do you want to open or save **IMP_servicesbygroup_nar.xls** from waprev.onmosaix.com?   Open | Save ▾ | Cancel | ✕

Click the "Open" button.

Helpful Hint – If your computer is blocking "pop-ups", try holding down the "Ctrl" key as you click on the "Open" button.

☐ **8) Once the file is open, you can name and save the file.**

Helpful Hint – Save time with the "Select New Report" button.

Need to run different reports covering the same time period?
Use the "Select New Report" button.

Home > Reports

Select New Report

Example:

- o You've run a "Services by Activity Report"

Services by Activity Report (with Narrative)

  for Jan-Sept, 2016.
- o You want to run a "Training Report" for that same time period.
- o While still on the screen where you select report parameters, click "Select New Report".
- o Then choose the Report Category and specific report you want to run.
- o The dates will copy over.

Congratulations! You can now repeat the steps for other reports!

If you run into any issues, send an email to PrevMIS@dshs.wa.gov. Be sure to include:
- Report you were trying to run.
- Mac or PC
- Browser
- Any snippets or screen shots of error messages you are seeing.