# How do I create a list of active and archived clients

## Question:

How can I pull the "Active Participants" list only? Is there a way to get an "active client list" that shows DOB, SS, etc.?

## Conditions:

To start you would first need to change the status of clients who have been discharged from active to archive.

***Recommend watching -*** How to Archive Clients (Video) if you are unfamiliar with how this is done. You will need to have Super Admin rights to complete this task.

## Solution:

Once you have moved all discharged clients from active to archived you will be able to run a data query filtering out all clients with a True (archived) client from your list. You will need to have Super Admin or Admin rights to complete this task.

***Recommend watching -*** Data Query with Export to Excel (Video) if you are unfamiliar with how this is done. You will need to have Super Admin or Admin rights to complete this task.

**Creating a report to show all active and/or archived clients**

Open Data Query

**Step #1** – Set Query Type to – Client Intake

**Step #2** – Set Sub Type to – All Clients

**Step #3** – Set Saved Queries to – New Query

**Step #4** – Type in a New Query – IE. ***Active Client List***

Click [**Next>>]** button

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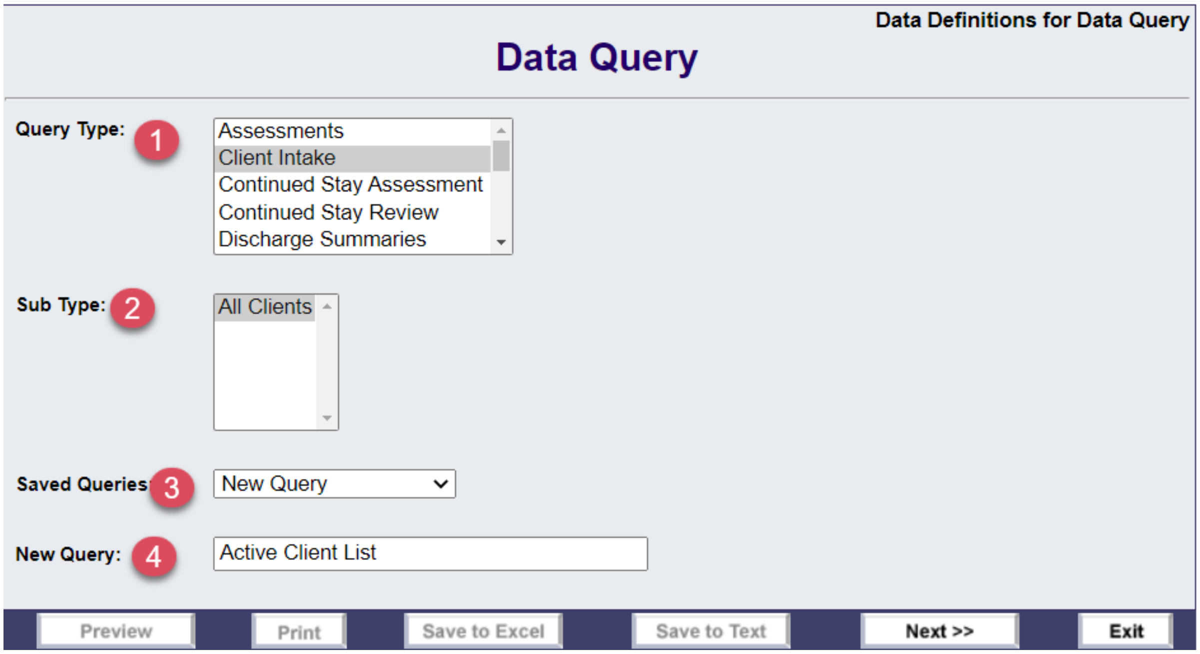
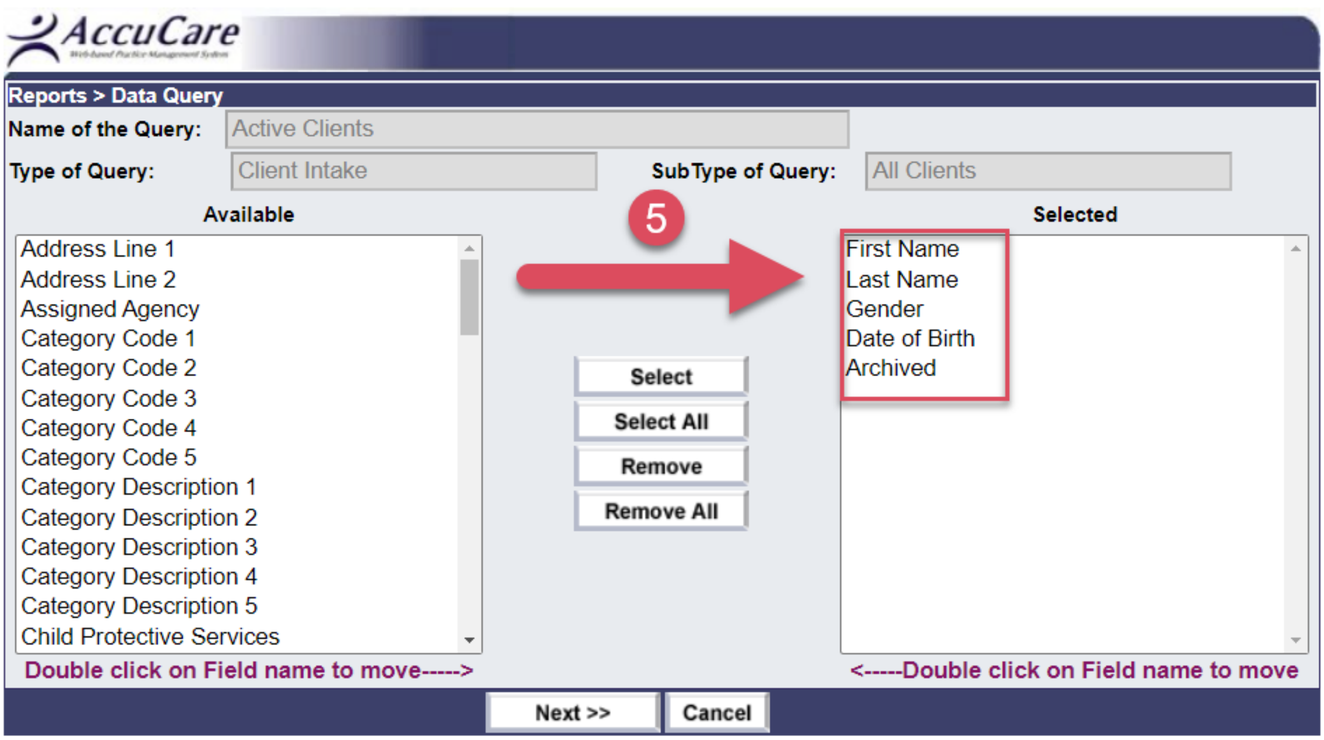



**Step #5** – Move the following data field from Available column to Selected column

Click [**Next>>**] button



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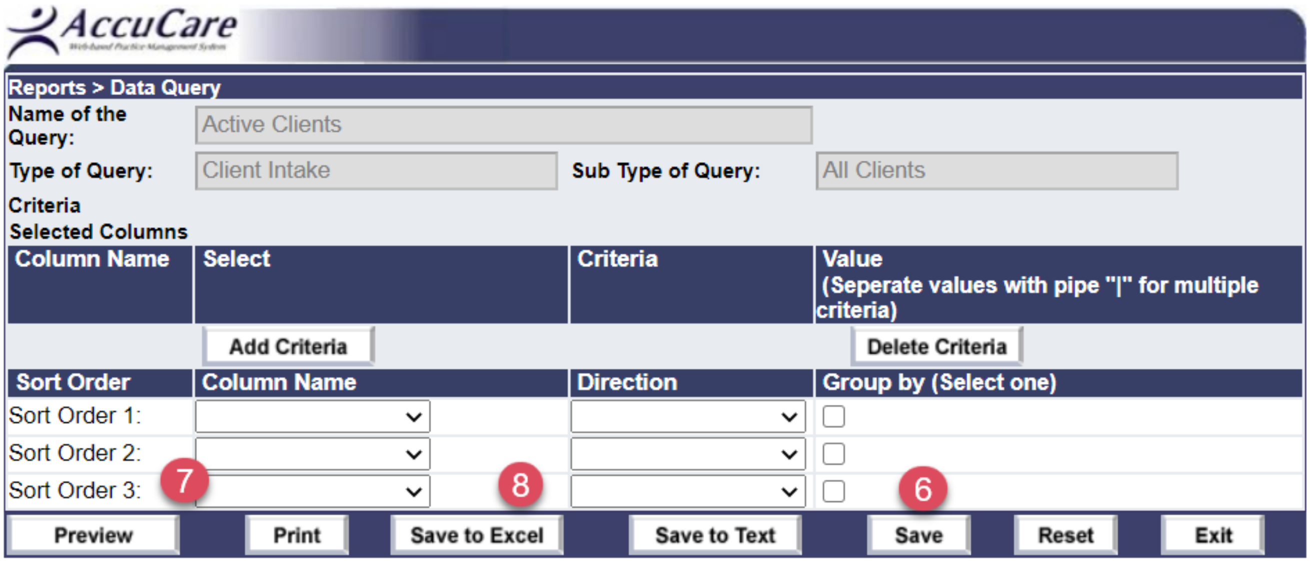
**Step #6** – Click the [**Save**] button to keep your setting for future use

**Step #7** – Click **[Preview**] button (for a quick view on screen)

**Step #8** – Click [**Save to Excel**] button to export results to Excel

This example shows both archived and active clients on the list




Screenshot from Step #7 – **FALSE = Active Clients** / **TRUE = Archived Clients**

***Note: To get back to the previous screen look for the [OK] button at the bottom of your preview list.***

| First Name | Last Name | Gender | Date of Birth | Archived |
|---|---|---|---|---|
| Jane | Doe | F | 12/23/1954 | TRUE |
| Kendall | Haley | M | 10/10/1980 | TRUE |
| Tammy | Hale | F | 2/23/1966 | FALSE |
| Tom | Kopecky | M | 1/1/1989 | FALSE |
| Mark | Taylor | M | 2/25/1966 | FALSE |
| Tina | Sawyer | F | 9/8/1959 | FALSE |
| Sally | Tally | F | 8/8/1978 | FALSE |
| Lisa | Wells | F | 9/7/1962 | FALSE |
| Debi | Smith | F | 6/4/1974 | FALSE |
| Sarah | Green | F | 7/1/1989 | FALSE |
| Laurie | Griffith | F | 8/2/1987 | TRUE |

Archived Clients

Active Clients

Archived Clients

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**These steps will show only active clients on the list.** *__- Added steps to show only Active clients__*

**Step a)** Click [Add Criteria] button

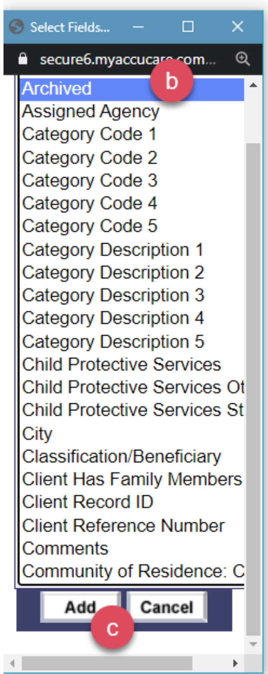
**Step b)** Select Archived

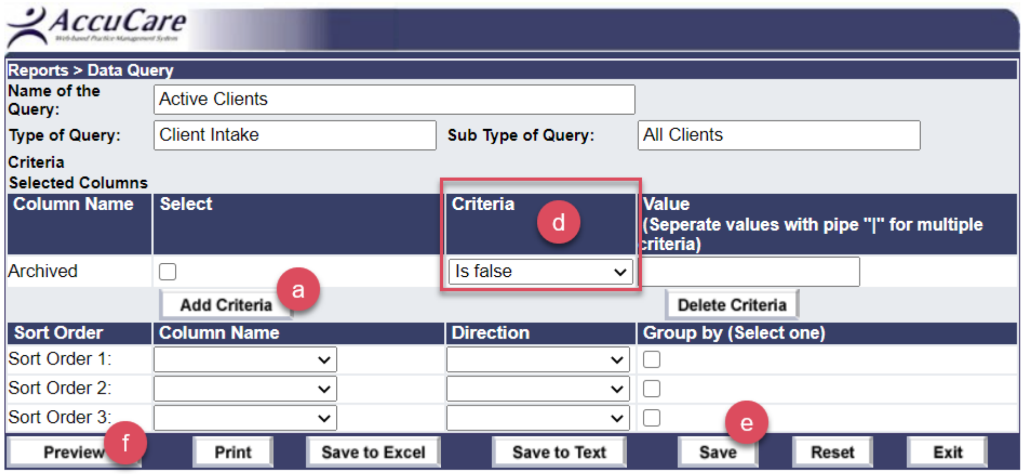
**Step c)** Click [Add] button

**Step d)** Under Criteria dropdown select {**is false**}

**Step e)** Click [Save] button

**Step f)** Click [Preview] button



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Screenshot – **FALSE = Active Clients**

***Note: To get back to the previous screen look for the [OK] button at the bottom of your preview list.***

| First Name | Last Name | Gender | Date of Birth | Archived |
|---|---|---|---|---|
| Tammy | Hale | F | 2/23/1966 | FALSE |
| Tom | Kopecky | M | 1/1/1989 | FALSE |
| Mark | Taylor | M | 2/25/1966 | FALSE |
| Tina | Sawyer | F | 9/8/1959 | FALSE |
| Sally | Tally | F | 8/8/1978 | FALSE |
| Lisa | Wells | F | 9/7/1962 | FALSE |
| Debi | Smith | F | 6/4/1974 | FALSE |
| Sarah | Green | F | 7/1/1989 | FALSE |
| Rose | Lare | F | 9/7/1979 | FALSE |
| Kelly | Marshal | F | 8/5/2005 | FALSE |

**All Active Clients**

**For additional questions, contact AccuCare Support at 800-324-7966 or email support@orionhealthcare.com and we will be happy to assist you!**