

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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Data Definitions for Data Query

Data Query

Query Type: **1** Assessments
Client Intake
Continued Stay Assessment
Continued Stay Review
Discharge Summaries

Sub Type: **2** All Clients

Saved Queries **3** New Query

New Query: **4** Active Client List

Preview Print Save to Excel Save to Text Next >> Exit

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

Click [**Next>>**] button

 **AccuCare**
Web-Based Practice Management System

Reports > Data Query

Name of the Query: Active Clients

Type of Query: Client Intake SubType of Query: All Clients

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Available		Selected
Address Line 1		First Name
Address Line 2		Last Name
Assigned Agency		Gender
Category Code 1		Date of Birth
Category Code 2		Archived
Category Code 3		
Category Code 4		
Category Code 5		
Category Description 1		
Category Description 2		
Category Description 3		
Category Description 4		
Category Description 5		
Child Protective Services		

Double click on Field name to move-----> <-----Double click on Field name to move

Next >> Cancel

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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

Reports > Data Query

Name of the Query: Active Clients

Type of Query: Client Intake Sub Type of Query: All Clients

Criteria

Column Name	Select	Criteria	Value (Seperate values with pipe " " for multiple criteria)
Add Criteria		Delete Criteria	

Sort Order	Column Name	Direction	Group by (Select one)
Sort Order 1:	▼	▼	<input type="checkbox"/>
Sort Order 2:	▼	▼	<input type="checkbox"/>
Sort Order 3:	▼	▼	<input type="checkbox"/>

Preview Print Save to Excel Save to Text Save Reset Exit

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 (points to Jane Doe and Kendall Haley)

Active Clients (points to Tammy Hale, Tom Kopecky, Mark Taylor, Tina Sawyer, Sally Tally, Lisa Wells, Debi Smith, and Sarah Green)

Archived Clients (points to Laurie Griffith)

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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

The screenshot displays the AccuCare Reports > Data Query interface. The main window is titled "Active Clients" and shows the following configuration:

- Name of the Query:** Active Clients
- Type of Query:** Client Intake
- Sub Type of Query:** All Clients
- Criteria:** Archived (checkbox), Is false (dropdown menu)
- Selected Columns:** Archived (checkbox)
- Sort Order:** Sort Order 1, 2, and 3 (dropdown menus)
- Group by (Select one):** (dropdown menu)

Red circles labeled a through f indicate the steps to be followed:

- a:** Add Criteria button
- b:** Archived option in the Select Fields... dialog
- c:** Add button in the Select Fields... dialog
- d:** Is false dropdown menu in the Criteria section
- e:** Save button
- f:** Preview button

The Select Fields... dialog is open on the left, showing a list of fields including Archived, Assigned Agency, Category Code 1-5, Category Description 1-5, Child Protective Services, Classification/Beneficiary, Client Has Family Members, Client Record ID, Client Reference Number, Comments, and Community of Residence: C. The Archived field is selected, and the Add button is highlighted.

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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!