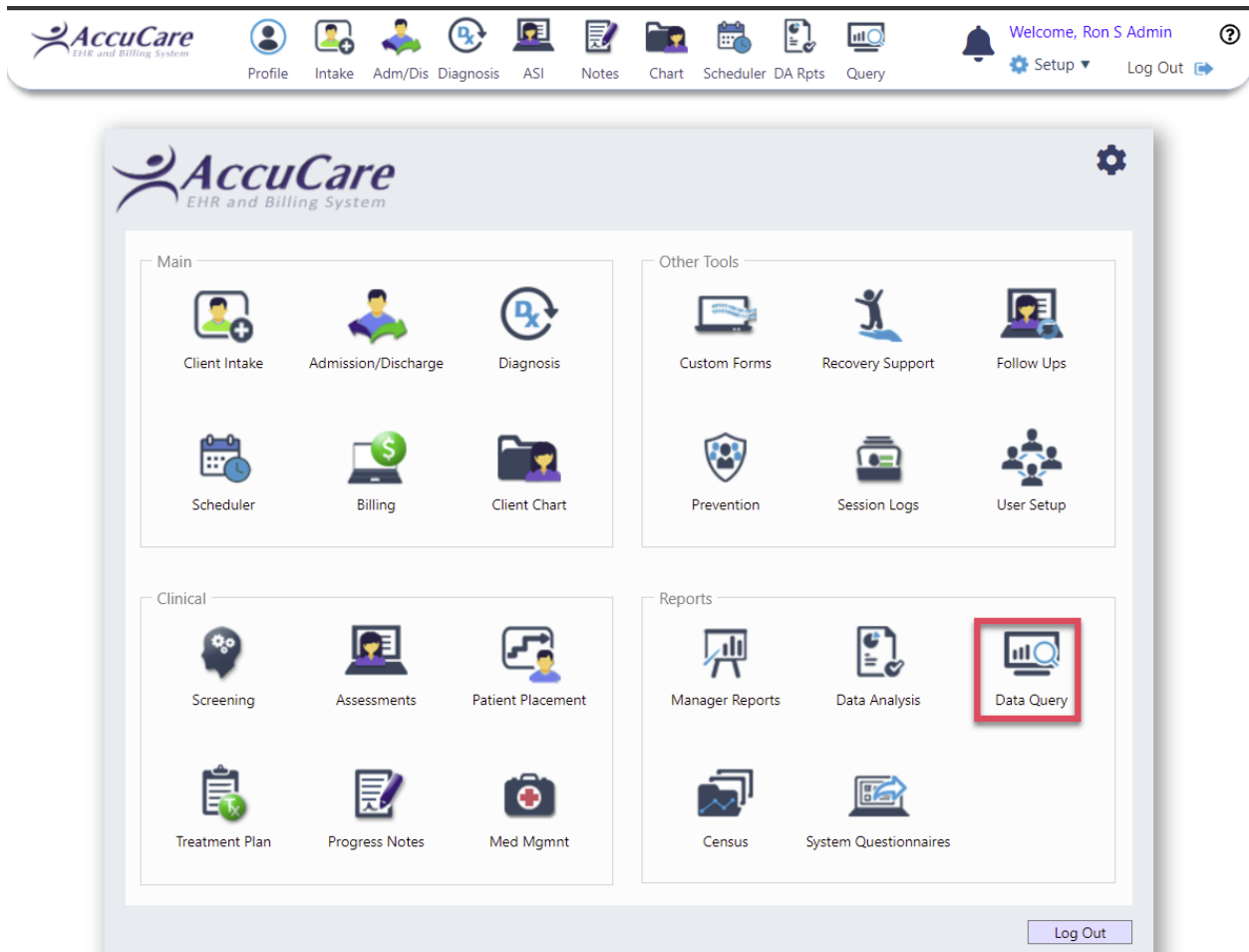


How to Create a Data Query

Data Query is the module used in MyAccuCare.com when you have a requirement to pull a list of specific field values. This module provides a means to pull data from assessments, client intake, progress notes, and many other modules. This guide will provide you instructions on how to select your Query type, pull the needed data fields and present them in excel format.

Where to find the Data Query module

The Data Query module can be found on Main Menu.



How to Create a Data Query

Data Query Setup Options – First Dialog box

Upon opening Data Query you are presented with various options.

Data Definitions for Data Query: Click this link for a list of excel reference files. They will display the values of the data fields found in the modules.

Query Type: Select the module you plan to run you query on

Sub Type: If the module contain a sub list of questionnaire they are shown here.

Saved Queries: Choose New Query or existing queries from this drop-down list

New Query: Type in a new query name if this is a query you haven't created before.

Data Query

Data Definitions for Data Query

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

Sub Type: Adolescent
Adult ASI Lite
Adult
Adult JCAHO
BSAP

Saved Queries: New Query

New Query:

Get Latest Data | Preview | Print | Save to Excel | Save to Text | Next >> | Exit

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Data Query Setup Options – Special Note

Special Note: Some of the Query Types will require an extra step before creating the query. When you choose one of the following Query Types you will need to click the **[Get Latest Data]** button. This step will create a copy in a holding area for the query module to run against.

1. Assessments
2. Continued Stay Assessment
3. Follow-ups
4. Supplemental Questions

The screenshot shows the 'Data Query' setup interface. The title bar reads 'Data Definitions for Data Query'. The main title is 'Data Query'. The interface includes the following elements:

- Query Type:** A dropdown menu with 'Assessments' selected. The dropdown list includes: Client Intake, Continued Stay Assessment, Continued Stay Review, and Discharge Summaries.
- Sub Type:** A dropdown menu with 'Adolescent' selected. The dropdown list includes: Adult ASI Lite, Adult, Adult JCAHO, and BSAP.
- Saved Queries:** A dropdown menu with 'New Query' selected.
- New Query:** An empty text input field.
- Buttons:** A row of buttons at the bottom: 'Get Latest Data' (highlighted with a red box), 'Preview', 'Print', 'Save to Excel', 'Save to Text', 'Next >>', and 'Exit'.

A red dashed arrow points from the 'Get Latest Data' button up to the 'Query Type' dropdown menu, indicating that this button should be clicked after selecting a query type.

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Creating a Data Query – First Dialog box (continued)

Here is an example creating a data query from the Client Intake module

- (1) Select Query Type = **Client Intake**
- (2) Select Sub Type = **All Client**
- (3) Select Saved Queries = **New Query**
- (4) Select New Query box = Type in - **Client List v4**
- (5) Click [Next>>] to continue

The screenshot shows the 'Data Query' dialog box with the following configuration:

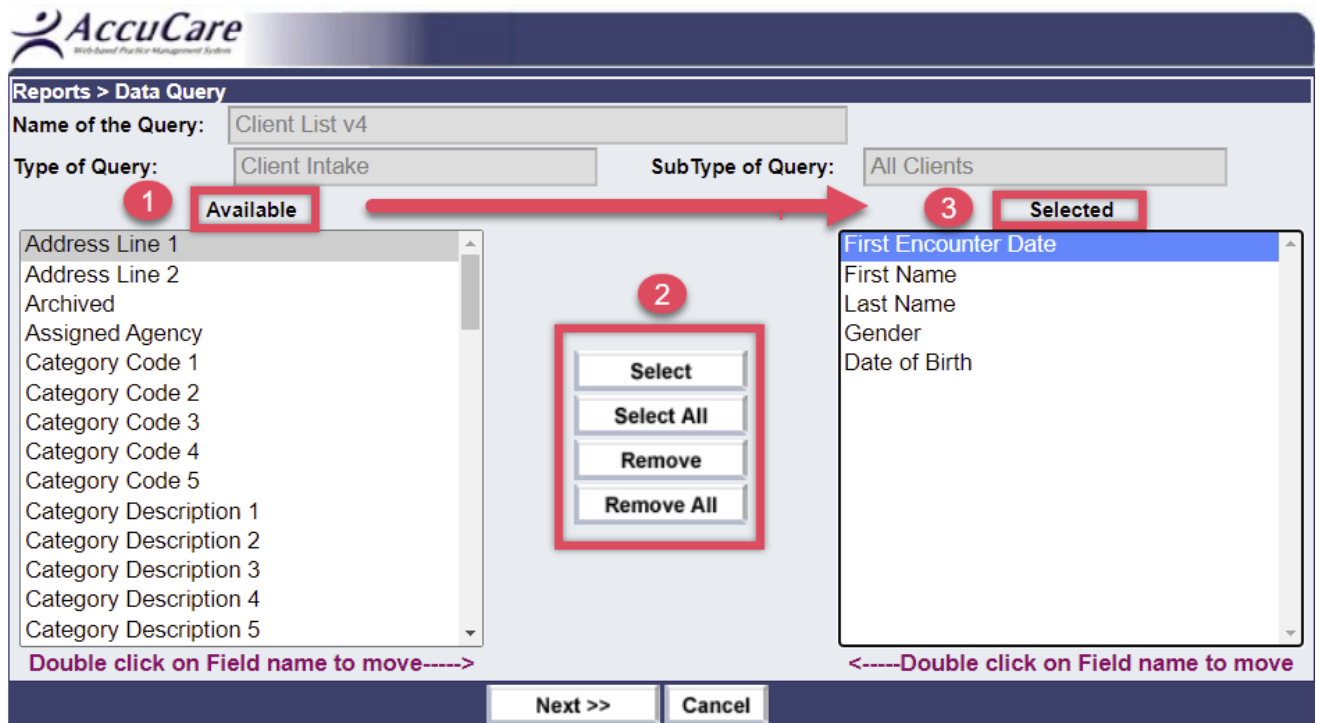
- Query Type:** A dropdown menu with 'Client Intake' selected. A red circle '1' is next to the label.
- Sub Type:** A dropdown menu with 'All Clients' selected. A red circle '2' is next to the label.
- Saved Queries:** A dropdown menu with 'New Query' selected. A red circle '3' is next to the label.
- New Query:** A text input field containing 'Client List v4'. A red circle '4' is next to the label.
- Next >>:** A button at the bottom right, highlighted with a red circle '5'.

At the bottom of the dialog box, there are buttons for 'Preview', 'Print', 'Save to Excel', 'Save to Text', 'Next >>', and 'Exit'.

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Creating a Data Query – Next Dialog box – selecting values

- 1) Under the **Available** column select the applicable data field values
- 2) Using the **Select, Select All, Remove** and **Remove All buttons** to move/remove selected values
- 3) The **Selected** column is a list of selected values to be seen in the excel report. The order they are placed in this column, top to bottom will show left to right in the report or on-screen. For example, the First Encounter Date will show in cell A1 of the excel report.



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Creating a Data Query – Last Dialog box – adding filters

Use filters to narrow down the search, if applicable.

- 1) Click the **[Add Criteria]** button to select your first filter criteria
- 2) Wanting to narrow down my search between specific dates. I am choosing the **First Encounter Date**
- 3) Clicking the **[Add]** button to add additional filters

The screenshot displays the AccuCare Reports > Data Query interface. On the left, a 'Select Fields' dialog box is open, listing various fields. The 'First Encounter Date' field is highlighted with a red box and a red arrow pointing to it, labeled with a red '2'. Below the list, the 'Add' button is highlighted with a red box and a red arrow pointing to it, labeled with a red '3'. On the right, the main 'Data Query' configuration screen is visible. The 'Name of the Query' is 'Client List v4', 'Type of Query' is 'Client Intake', and 'Sub Type of Query' is 'All Clients'. The 'Criteria' section is empty. The 'Selected Columns' table has columns for 'Column Name', 'Select', 'Criteria', and 'Value'. The 'Add Criteria' button is highlighted with a red box and a red arrow pointing to it, labeled with a red '1'. Below the 'Selected Columns' table, there are three 'Sort Order' rows, each with a 'Column Name' dropdown, a 'Direction' dropdown, and a 'Group by (Select one)' checkbox. At the bottom of the main screen, there are buttons for 'Preview', 'Print', 'Save to Excel', 'Save to Text', 'Save', 'Reset', and 'Exit'.

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- 4) I have selected the same data field names **First Encounter Date** to focus on a range of dates
- 5) Next I am choosing the criteria column to reflect a beginning date and ending date
- 6) Finally entering the date range I want to focus on.

The screenshot shows the 'Data Query' configuration page in AccuCare. The 'Name of the Query' is 'Client List v4'. Under 'Criteria', two rows are defined for 'First Encounter Date'. The first row has the criteria 'Greater than or equal to' with a value of '01/01/2019'. The second row has the criteria 'Less than or equal to' with a value of '01/01/2021'. Red arrows and circles labeled 4, 5, and 6 point to the column name, criteria dropdown, and value input fields respectively.

Column Name	Select	Criteria	Value (Separate values with pipe " " for multiple criteria)
First Encounter Date	<input type="checkbox"/>	Greater than or equal to	01/01/2019
First Encounter Date	<input type="checkbox"/>	Less than or equal to	01/01/2021

Under **Sort Order** you are given an option to sort the output before previewing.

- 7) Select one of a column name from your selected list of data fields
- 8) For each column name select the direction of your output
- 9) Remember to [Save] your settings before previewing

This screenshot shows the 'Sort Order' section of the 'Data Query' interface. A 'Query Saved' notification box is visible at the top. In the 'Sort Order' table, 'First Encounter Date' is selected for 'Sort Order 1' with an 'Ascending' direction. A dropdown menu is open for 'Sort Order 1', showing 'First Encounter Date' as the selected item. Red arrows and circles labeled 7, 8, and 9 point to the dropdown menu, the 'Direction' dropdown, and the 'Save' button respectively.

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

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Data Query Output Options – Last Dialog box

Preview on screen – for a quick view to ensure you are pulling the right data



First Encounter Date	First Name	Last Name	Gender	Date of Birth
1/17/2019	Tom	Westly	M	1/1/1980
1/22/2019	John	Jones	M	4/9/1986
3/4/2019	Jane	Young	F	8/20/1987
3/14/2019	Zed	Zackerson	M	8/12/1973
8/5/2019	John	Doe	M	10/18/1998
8/26/2019	Jack	Jones	M	7/6/1987
8/26/2019	Anna	Able	F	8/14/1965
8/26/2019	Roger	Straker	M	9/3/1974
3/16/2020	Toby	Smith	M	6/7/2000
4/28/2020	Jane	Able	F	8/8/1989
6/29/2020	John	Able	M	10/9/1980
7/2/2020	Tom	Youth	M	10/10/2010

Save to Excel – This is the best option to create your reports using Excel to sort and create graphs



	A	B	C	D	E	F
1	First Encounter Date	First Name	Last Name	Gender	Date of Birth	
2	1/17/2019	Tom	Westly	M	1/1/1980	
3	1/22/2019	John	Jones	M	4/9/1986	
4	3/4/2019	Jane	Young	F	8/20/1987	
5	3/14/2019	Zed	Zackerson	M	8/12/1973	
6	8/5/2019	John	Doe	M	10/18/1998	
7	8/26/2019	Jack	Jones	M	7/6/1987	
8	8/26/2019	Anna	Able	F	8/14/1965	
9	8/26/2019	Roger	Straker	M	9/3/1974	
10	3/16/2020	Toby	Smith	M	6/7/2000	
11	4/28/2020	Jane	Able	F	8/8/1989	
12	6/29/2020	John	Able	M	10/9/1980	
13	7/2/2020	Tom	Youth	M	10/10/2010	
14						

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