NEW YORK STATE OF OPPORTUNITY.™ | **Office for People With Developmental Disabilities**
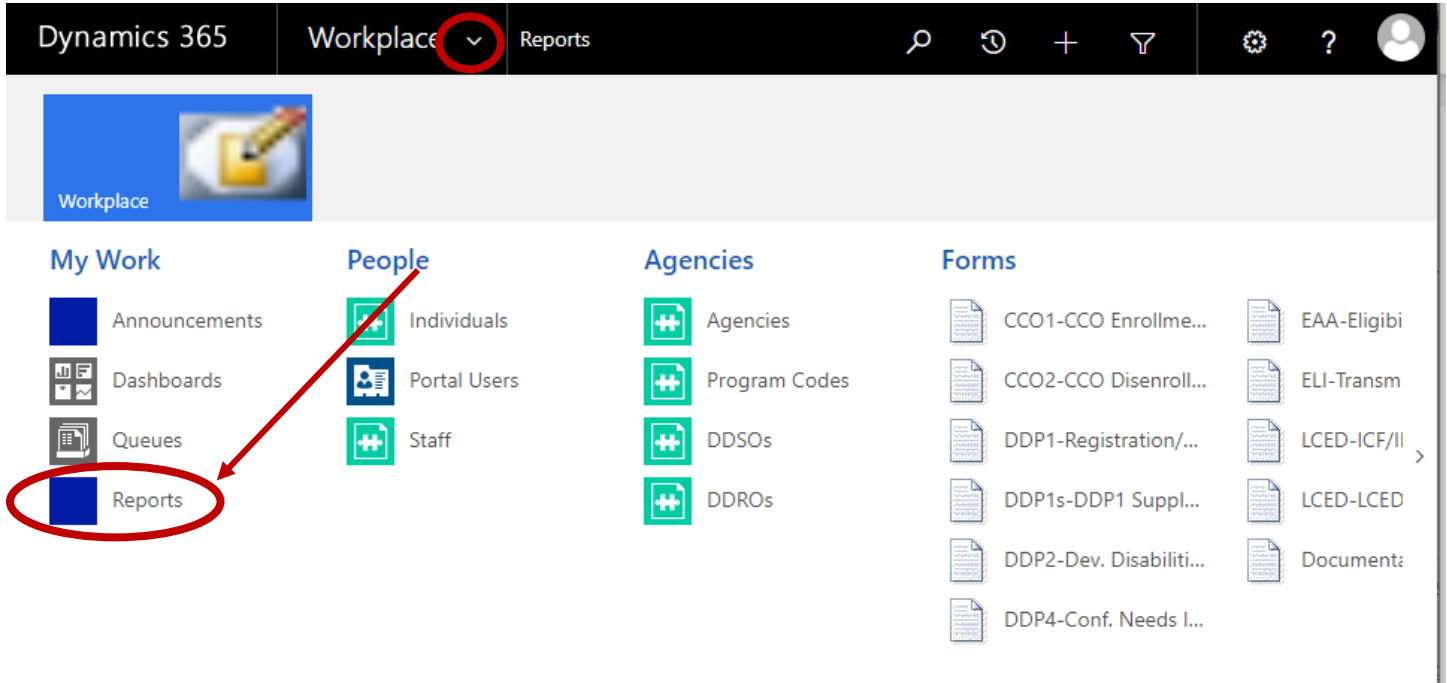
CHOICES Reports

(Including the User Summary Report)

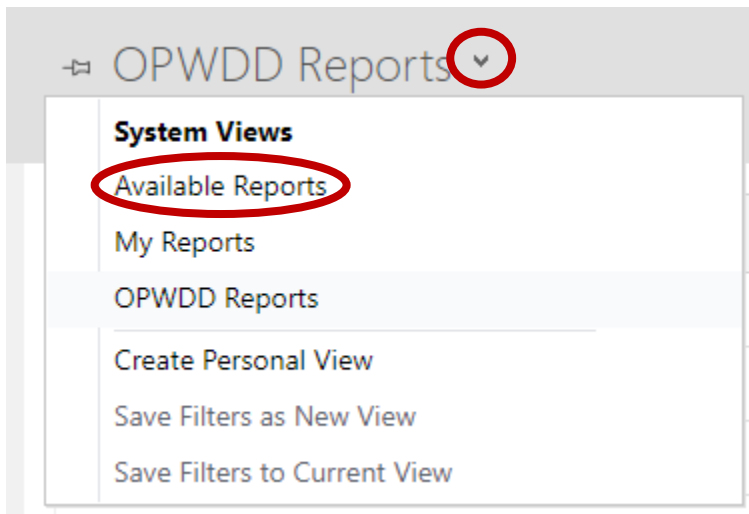User Guide

CHOICES User Summary Report

(Data in this guide is fictional and for illustrative purposes only)

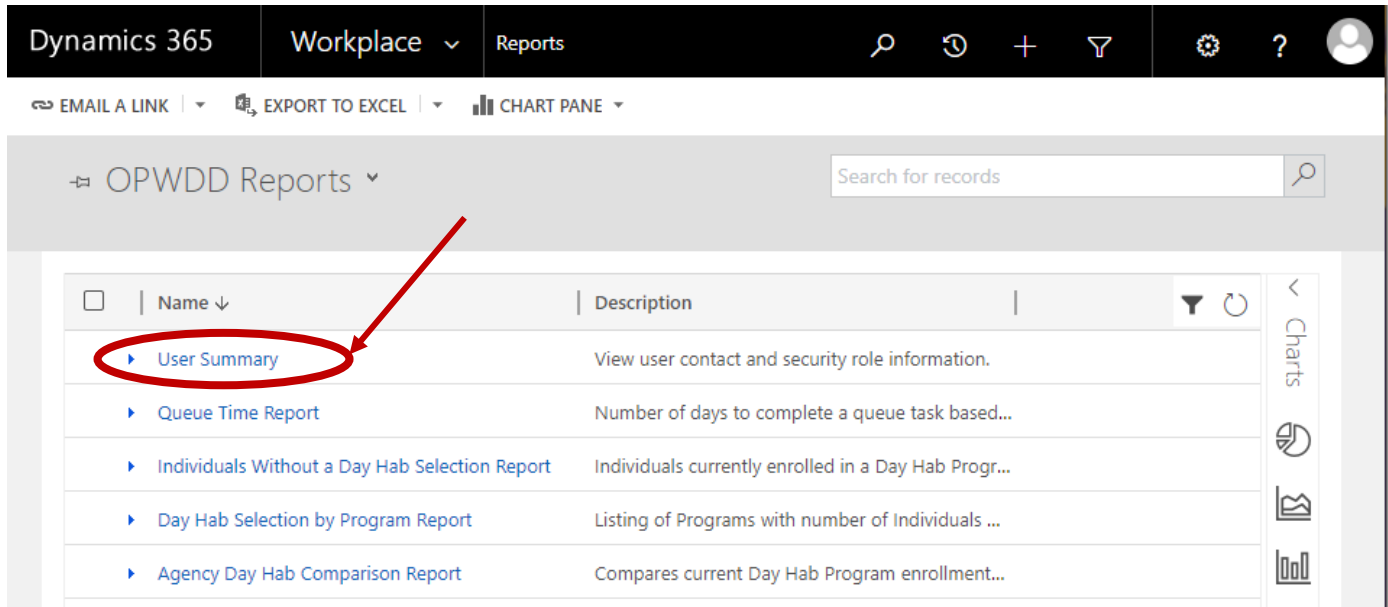Reports in CHOICES are set reports that provide various information depending on a user's role.

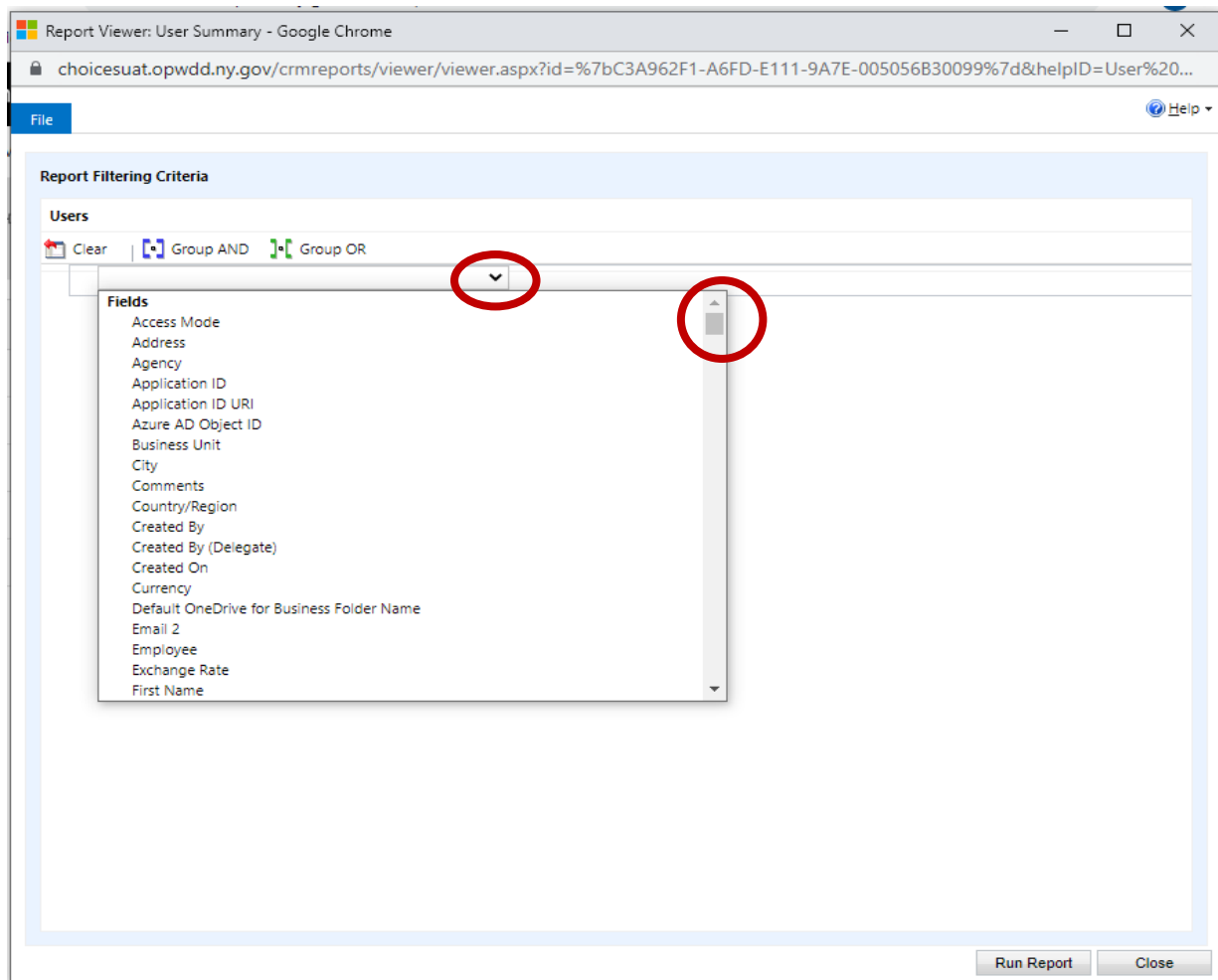To find Reports, click on the down arrow next to Workplace and then click on Reports.

A list of reports appears to see additional Reports, click on the down arrow next to OPWDD Reports and select Available Reports. All available Reports will appear.
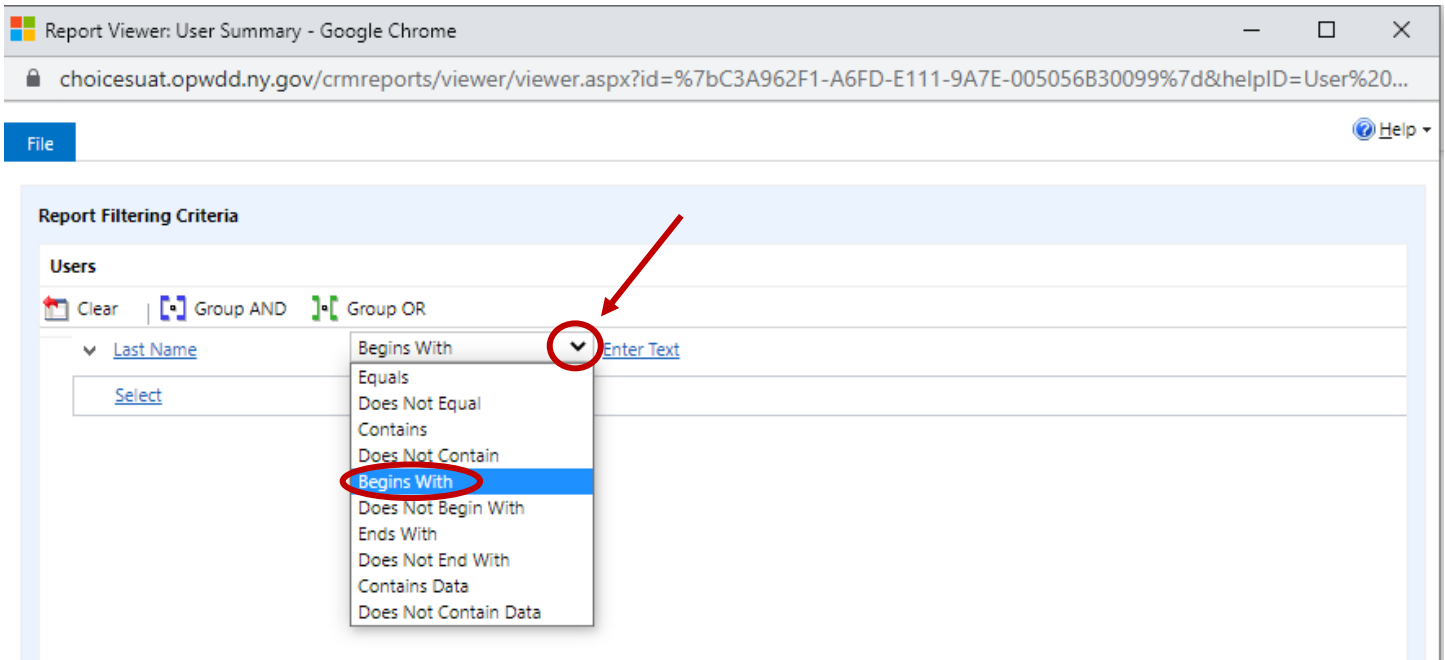
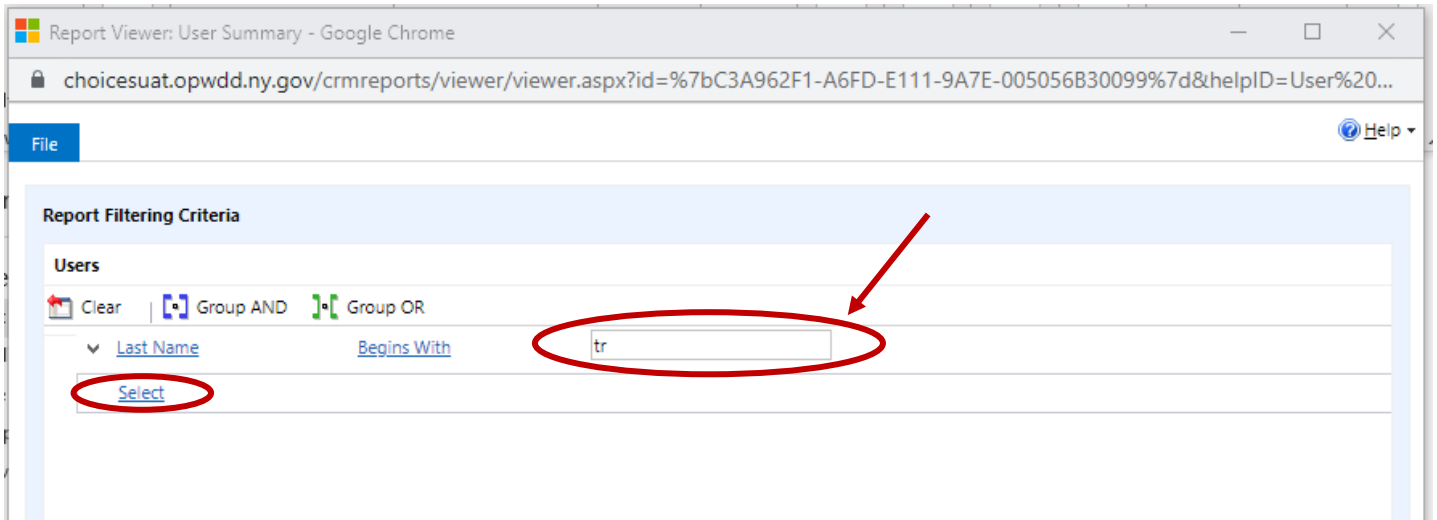To open a report, click on the Name of the Report. The User Summary Report is the example that will be used.

The User Summary Report Viewer Window appears. A field "Select" displays, click on the down arrow to reveal the criteria that the report can be filtered on. Use the scroll bar to find additional criteria.

For the example, the field Last Name will be chosen. The formula field then appears and defaults to equal. Change the formula by clicking on the down arrow. For the example, Begins With will be selected.

For the example, enter "tr" into the Enter Text box. Additional criteria can be chosen by clicking on the select box underneath Last Name.

When finished selecting criteria, click on Run Report.

The report displays with the users' account status (enabled or disabled), agency (shown as Business Unit) and the role(s) assigned. The account status remains enabled if the user signs into CHOICES at least once in a six-month period. After six months of inactivity, the account will automatically be disabled.

To move through the report click on the arrows on either side of the page numbers. The report can also be downloaded in various formats by clicking on the save icon. To change any criteria, click on the Edit Filter button.