

## Part 1: Creating a custom child roster for CCR Analytics in ChildPlus.net's LiveReports module

1. Navigate to the LiveReports module in ChildPlus: Setup > Module Setup > LiveReport – Custom Report Designer
2. Click on “Add New LiveReport” in the bottom left corner (select: start with a blank report).
3. Enter a report “Number”. This can be any number that is not already in use for a report.
4. Enter a report “Name”: CCR Analytics Child Roster
5. Set “Category” to “DIS – Disability”. It needs to be Disability in order to include IEP info.
6. If you’d like, enter a description. For example: “Custom child roster created by CCR Analytics to aid in processing child assessment data.”
7. Set “Base this report on” to “Participant”.
8. Set “Select a specific type of Participant Information” to “IEP/Disability”.
9. Choose the Security Groups that are permitted to run this report. (This is at your discretion).
10. Click the “Next Step” button at the bottom of the screen.
11. Under “Select Fields”, please add the following Database Fields to the Report Fields box:
  - a. Person
    - i. Name (First)
    - ii. Name (Last)
    - iii. Birthday (not mm, mm-dd, yyyy-mm, but just Birthday)
    - iv. ChildPlus ID
    - v. Primary Language
    - vi. Gender Code
    - vii. Hispanic
    - viii. Race
      - ix. Race American Indian or Alaskan Native
      - x. Race Asian
      - xi. Race Black or African American
      - xii. Race Hispanic
      - xiii. Race Multi-Racial
      - xiv. Race Native Hawaiian or Other Pacific Islander
      - xv. Race Other
      - xvi. Race Other Description
      - xvii. Race White
  - b. Enrollment
    - i. Enrollment Status
  - c. IEP
    - i. IEP Disability Code Description

- d. Program
    - i. Program Name
  - e. Region
    - i. Region Name
12. Click on “Advanced” in the upper right. In the window that pops up, delete “Participant” from the Groupings. Then click OK.
  13. It should be auto-saving all along, but to be safe, click “Save” in the upper right corner. The report has been created! You can click on “x” to exit.

## Part 2: Running and exporting the custom report

1. Navigate to the report: Reports > LiveReport > CCR Analytics Child Roster
2. Set “Program/Term” to the current school year or assessment checkpoint.
3. Set it for “All Groups”, “All Sites”, “All Classrooms”.
4. Select “Group by Agency”.
5. In the Status box, check “Enrolled” and “Completed”. All others can be unchecked.
6. Under “Show Participants”, select “that were enrolled at least one day between”.
  - a. Begin Date = 1<sup>st</sup> day of your school year (or approximately that date)
  - b. End Date = today’s date
7. Check “Suppress Duplicate Records” and “All Diagnoses”. Leave Diagnosis Date Range blank.
8. Additional Criteria should also remain blank.
9. Click “Preview” in the upper right corner.
10. If the report looks okay, click “Save As PDF, Excel, etc.”
11. Please save as type: “Comma-Separated Values (\*.csv)”
12. Send the .csv file to CCR Analytics. Thank you!

Please send the .csv file to [support@ccr-analytics.com](mailto:support@ccr-analytics.com). If you have any questions, please feel free to contact us!

Kind Regards,

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