## Instructions for running the MEMBER APPOINTMENT ACTIVITY Reports – For Coaches

**Description:** This report shows all contacts and tutoring sessions that were entered into the Care4 platform by the staff person who entered them.

- This report ONLY shows young people for whom contacts were entered. If a contact was not entered, the young person will NOT show up in the report.
- If the contact was NOT attached to the one of the following foundation cases, it will not show up in the report:
  - Coaching Enrollment & Contacts
  - Middle School Enrollment & Contacts
  - Targeted Services

## **Instructions on how to run the report:**

- 1. Click on MY WORK on the left-hand menu
- 2. Click on **REPORTS** from the center menu

My Coachload Contacts & Documents Employment Info Reports Basic Staff Info

3. Click on **REPORTS** along the bottom of the page

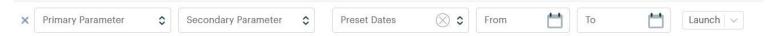


4. Click on the Launch button below MEMBER APPOINTMENT ACTIVITY



## Member Appointment Activity

Summary of your own appointments over time.



- 5. PRIMARY PARAMETER: Select your name from the drop-down list
- 6. **SECONDARY PARAMETER**: ignore this field
- 7. **PRESET DATES**: Only use this if it has an option for the month you want to view (i.e. PREVIOUS MONTH); otherwise leave it blank and use the FROM DATE and TO DATE fields below
- 8. **FROM DATE**: Enter the first day of the month you want to view
- 9. TO DATE: Enter the last day of the month you want to view
- 10. Click on the Launch button
- 11. The report will populate on your screen
- 12. Click on the down arrow to the right of Launch and select DOWNLOAD EXCEL to export the data to Excel