# CIAS Reports

## Introduction to Reports

Reports are PDF documents that are generated when a participant has completed a CIAS session. can be generated. Reports consist of text and images and can be tailored based on a participant's responses

There are 2 types of reports in CIAS - **participant reports** and **third party reports**. The processes to set up and access these reports are identical, the key difference is who will receive a copy of the report at the end of a session:

- **Participant reports** - these are sent to an email address provided by the participant. If the participant is signed in with a CIAS account, their account email will be automatically filled in and used. If the participant is not logged in, they will be asked to provide an email address.

  This process happens via a **participant report screen** - this screen type provides a yes/no question where the participant can opt in to receiving a report or not. If a participant opts out, the report will still be generated and available on the intervention dashboard for the researcher, it just won't be sent to the participant.

- **Third Party Reports -** these can be sent to anyone as long as their email addresses have been previously provided in the **third party report screen before  publishing the intervention.**  This process allows you to share reports with anyone you'd like without requiring them to be on your CIAS team. These reports are set up so you can send them to providers/team members who are associated with specific participants.

  **An example:** if your study participants are referred from 4 different clinics, you can provide each of the 4 clinics as an answer option on the third party report screen with the appropriate emails entered where you would typically put a variable value. Then, have the participant select which clinic they attend - this will ensure the report is sent to the specific clinic associated with your participant.

**Note**: while Participant reports screens allow participants to opt in or out of receiving a report, the third party screen does not do this. For this reason, we often suggest asking if participants would like a report sent to their provider (or whomever is receiving the third party report) on a screen before presenting the third party report screen - this would allow you to skip the third party screen if the participant does not provide their consent.
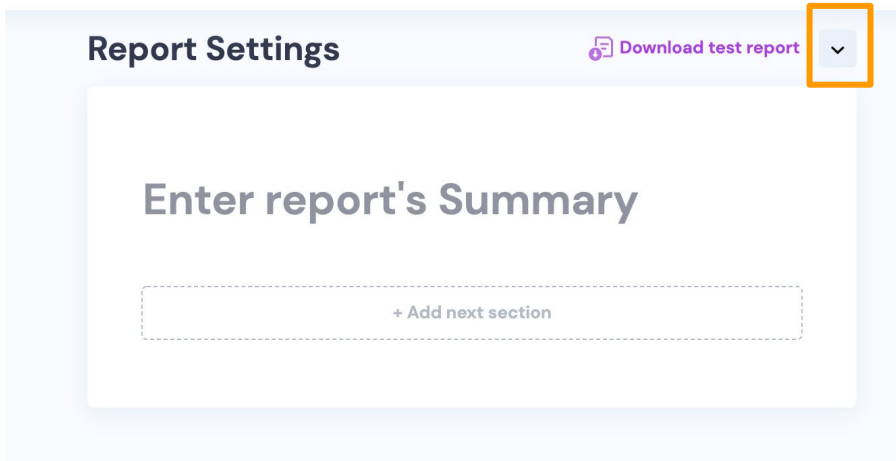
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## Setting Up Reports

Reports can be created on the "Report Templates" tab of a session.

**Screen Creation**   General Settings   | Report Templates **1** |   Generated Reports **0**   SMS Messaging **0**   Session Map

To create a new report, click the "Add new report template" button on the upper right hand side of the screen

**+ Add new report template**

**Report Settings**        📄 Download test report  ⌄

### Enter report's Summary

+ Add next section

Use the small drop down arrow next to "Download test report" to:
- Change the report type (participant or third party)
- Add a custom logo to your report header
- Rename the report
- Delete the report

Reports have a main title and are made up of sections which can each have:
- A Title
- An image (the image appears on the far right hand side of the section)
- Body text

Sections are set up based on a formula-case structure which means they can be tailored to show different information based on participant responses, how participants score on assessments, etc.

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## Accessing Reports

After a participant completes a session, the report will be available on the CIAS intervention dashboard for the team to access. Under the "Generated Reports" tab - all participant and clinician reports are available to view.

**Screen Creation**   General Settings   Report Templates **1**   [Generated Reports **0**]   SMS Messaging **0**   Session Map

## Some Ideas on How To Use Reports

- Send participants a copy of their responses so they can refer back to them later
- Sent participant resources associated to the topics addressed in your intervention
- Use third party reports to help clinicians be aware of the behavioral aspects of their patients' lives - pushing them to take a more holistic approach to care.

## Tips

- By design, reports are completely anonymous. In order to help third parties know what participants the reports are associated with, you should add in some sort of identifier to your text- whether it's a participant ID, a name, and a birthdate, etc (make sure it's appropriate under your IRB approval!)
- You can use 1=1 for a formula if you want the section to ALWAYS appear the same regardless of a participant's answers
- You can test what your report will look like by testing your draft intervention in Preview mode.

## Let's try it out!

- **Set up a participant report screen that asks if a participant wants to receive resources**
- **Set up a 3rd party report screen with 4 clinic options:**
    - **Clinic A** should send emails to [dralli@email.com](mailto:dralli@email.com)
    - **Clinic B** should send emails to [brianna@email.com](mailto:brianna@email.com) and [drgeorge@email.com](mailto:drgeorge@email.com)
    - **Clinic C** should send emails to [clinic@email.com](mailto:clinic@email.com)
    - **Cinic D** should send emails to [drdre@email.com](mailto:drdre@email.com)

    All of the clinics should receive the same third party report AND Clinic C wants an additional report on resources for participants

# CIAS Reports

## Experiencing issues with your report? Use this checklist:

- ❏ Check to see that you selected the correct report type under the Report Templates tab (participant or third party).
- ❏ Make sure the correct report screen (participant or third party) is added to your session. It should match the report type you selected under the Report Templates tab. Note: if you are using both report types, your session should include both report screens (participant and third party).
- ❏ If using a third party report, make sure the correct report is linked to the report screen in your session.
- ❏ If using a third party report, make sure you are using emails connected to a third party account or an email that is **not** associated with an existing CIAS researcher or participant account.
    - ❏ Note: you can use the (+) trick with a researcher or participant accounts while testing (e.g. researcher**+report**@email.com).
- ❏ In order to reflect free response questions in the report, such as name, date, or other free responses, etc.) you must link free response variables to another question in your intervention. We recommend using any question in your intervention.

If you are still experiencing issues with your reports, please contact cias@msu.edu or sign up for office hours.