Excel Reports for Recall

Parklane's new Excel reports are designed, formatted and print-ready. They may also be edited as the user sees fit. Below is a list of reports currently available in **Recall.** *Please read descriptions carefully.*

We recommend viewing the video provided on Parklane's Resource Page for information on the reports.

Special notes:

- Depending on size of your organization and data within the system, some of these graphs will take a few minutes to produce.
- Due Dates: These graphs include due dates of tests that are enrolled in the recall process only – i.e. a test is recorded, then auto-scheduled by system.
- Each report excludes only terminated employees. Employee status is included in the source data should you wish to filter any other status types.
- Each graph report contains many formats of information. Depending on your module setup, some formats may or may not present well for your organization.
- Instruction on the use of Microsoft Excel is *not* available through Parklane Support, however, many helpful tutorials can be found online.

Report Name	Report Code	Report Details
Compliance – Scheduled	BHA Test Group Test Department Group Name Status ID Date Test Taken Next Due Date Next Chained Test Next Chained Date Test Status In A Word Key Supervisor Dept Code Business Email	Choose a test for overall and Dept/Group numbers. Compliance based on due date of next scheduled test (includes: compliant, overdue, noncompliant). You may also choose multiple **chained** tests in ONE Recall Group. Will report details of the last of those tests that was taken. If any tests within a chain have been taken (and is prior to their next scheduled date) will result in compliance. (eg. TB series) **Note**: This report includes due dates of tests that are enrolled in the *recall process only* – i.e. a test that is recorded, then auto-scheduled by system. They do not include tests that have been manually scheduled. - Main sheet: Pie graph of overall compliance percentage, bar graph of numbers of compliant, overdue and no results. Includes table of departments with percentages. - Second sheet: Table of dept/group, employee name, last test taken, date taken, next chained test, next due date in

		chain, status. Filtering status drop down will narrow down overdue results. • Third sheet: Table of Dept/Group, Name, counts of test status. • Fourth sheet: Provides table sorted by position, dept/group and compliance percentages.
Compliance – Taken	BHB Test Group Test Department Group Full Name Status Position Union Date Taken Numeric Text In A Word Key Year End Dept Description Supervisor Dept Code Business Email	Choose up to 5 tests for overall and Dept/Group numbers. Compliance based on date taken within date range. i.e. If test was taken within date range = compliant. (includes: compliant or no record). *This report displays the last test taken for **each** test chosen*. • Main sheet: Bar graph of each test totals, including counts for those with no records for any of the tests chosen. Graph of totals by type of test and year. • Second sheet: Table of dept/group, employees, test name, date taken (if applicable) and checked off if compliant. • Third sheet: Table of departments, employees, counts whether they have taken the test(s) or have no records. • Fourth sheet: Table of Dept/Group with percentages of test taken. Best for when only one test is chosen.
Recall Statistics	BHC Test Group Test Department Group Name Status ID Date Test Taken Next Due Date Test Status In A Word Key Year End Dept Description Supervisor Dept Code Business Email	Choose tests to examine by dept/group. Report will pull last test taken (if there is one recorded) *of all tests chosen* within date range. • Main sheet: Pie chart of percentage taken of all tests chosen, chart of all test activity combined by year, chart of number test types by "In A Word". • Second sheet: Table by Dept/Group, includes name, test taken, date test taken, due date (if applicable) and test status (note: if a next test is not booked, it will reflect as overdue). • Third sheet: Table of tests by dept/group, employee names and test taken counts. • Fourth sheet: Table of dept/group and test counts. • Fifth sheet: Table of tests and test status counts. • Sixth sheet: Table by dept/group, name, test and In A Word Counts.
Employee Records	BHD Test Group Test Name Date of Birth Position Date Test Taken Next Due Date Test Status In A Word Numeric Text Key	Choose one employee to display all records and status. If a test has been taken more than once, it will include the last test taken. **Note**: Any due dates included in this report are of tests that are enrolled in the recall process **only** – i.e. a test is recorded, then auto-scheduled by system. They do **not** include dates that have been *manually* scheduled. • Main sheet: Graph of number of compliant vs. any overdue. Table of tests organized by test group, date

	Dept Description Supervisor	taken, due date (if applicable), test status, in a word, number and text fields.
Compliance – Multigroup	BHE Test group Test Name DOB Dept/Group Dept Code Dept Description Emp ID Position Date test taken Test status In a Word Numeric Text Additional comments Notes Key Year End Dept Description Supervisor Business Email	Choose Date Range of those are compliant (*eg. if pulling N95 Tests, choose two year range*). Report will pull the <u>last test</u> taken of ALL tests selected for all employees. Report will indicate who is compliant, who is not compliant *(incl. when they last had the test)*, and those who never had the test. • Main sheet: Pie graph of compliance vs non-compliance by percentage. Pie graph of the numbers of compliant vs numbers not compliant. Bar graph of each test and the numbers compliant vs non-compliant. • Sheet two: Table by Dept/Group, includes name, position, date test taken, test taken, test status: Compliant vs. Non-Compliant. • Sheet three: Table by Dept/Group, includes # compliant, # non-compliant and total employees. • Sheet four: Table of Dept/Group, includes percentages of those compliant vs. non-compliant. • Sheet five: Table of Dept/Group, includes percentages of compliant vs. non-compliant by position and duplicate table of numbers. • Sheet six: Table by position, includes name, department, date test taken, test taken, # of compliant vs. non-compliant. • Sheet seven: Bar graph of compliance by position. Includes table of percentages and numbers of compliance.
Taken/Due Report	BHG Key Name Date of Birth Department/Group Department Code Department Desc Emp ID Position Date Of Hire Test Name Test Taken Test Due Test Over Due Employee Status Phone Number Supervisor Business Email	This report allows you to select all tests, or individual tests. For each employee it will display when it was last taken, when it is due/scheduled to be repeated (if applicable) and indicate whether it is overdue. ***Note***: *if an employee is not booked for any of the tests chosen, <u>or has never received any of the tests</u>, they will not appear on the report.* • Main sheet: Table sorted by dept/group, including name, name of test, date taken, date due, indicates whether they are overdue and counts. All headings may be filtered. • Sheet two: Table sorted by supervisor, includes all <u>overdue</u> tests - including employee, name of test, date taken, date due. All headings may be filtered. • Sheet 3: Collapsible table of counts by position and test. • Sheet 4: Table of tests that include # of tests taken and # of overdue.

Test Results	BHJ	This report pulls all test result available within date range *(eg. If test was taken 3 times in the date range, all 3 will appear on report)*. Report will report on up to 10 different tests.
	Test Group Test Group Dept Code Department Name EE ID EE Status Birth Date Gender EE Key Enter By Date Entered Time Entered Function Date Taken Numeric Results Text Results In a Word Position Union Notes Comments Year End Business Email	• Main sheet: Graph of tests taken by year, pie chart of tests taken, cumulative line graph of tests. • Sheet two: Table with counts of the tests that have been taken by dept/group. • Sheet three: Table with counts of tests that have been taken sorted by In A Word. • Sheet four: Table with counts of tests by employee. Includes date taken, test, text results, in a word and any numeric results.