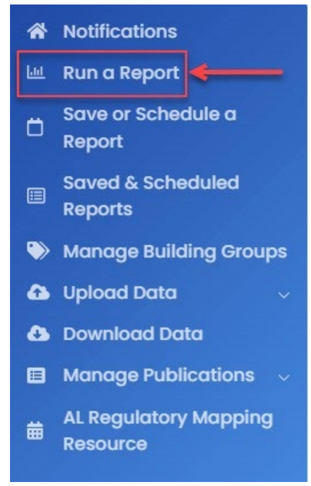
This document provides a summary of how to generate reports in the LTC Trend Tracker system. Please note your level of access to LTC Trend Tracker is determined by your organization's account administrator(s). The account administrator assigns all user permissions, including access to individual centers' data and specific reports. Please contact your account administrator(s) to learn more about this access. In addition, initial LTC Trend Tracker registration of a center **must** be completed by your corporate office or your owner.

How to Generate a Report

The report feature allows users to see data about their center(s) and compare that data to a selected peer group. Users can customize their reports.

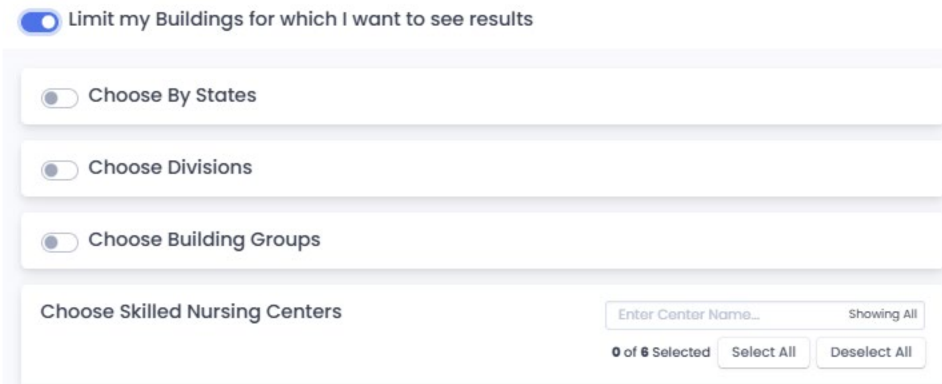
1. Once logged in, click "***Run a Report***" on the left-hand side of the screen.



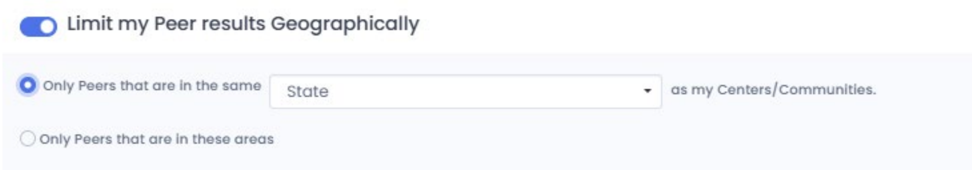
2. Next, select the report you want to see by clicking under "Configure your Report Criteria". There is a drop-down list of all the available reports to run. Note: Your ability to run certain reports such as Turnover and Retention is dependent on your user permissions. (for definitions of reports see glossary). Select your report: **Note**: You may select only one report at a time from the drop-down list.

3. **Limit my buildings for which I want to see results**: This section allows you to select between one center, a specific buildings group, or a group of centers that has been defined by your account administrator (called "divisions"), or the whole organization (dependent on your user permissions). Check this box to run

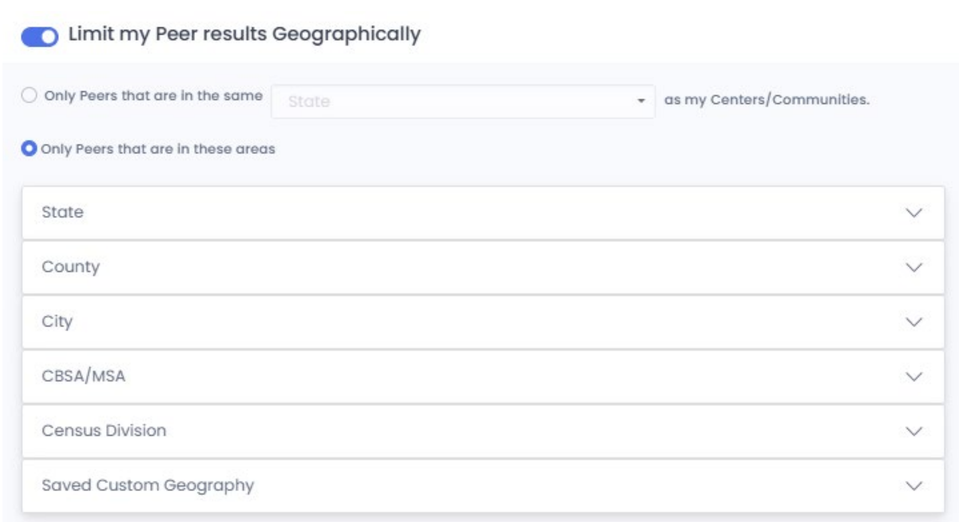
a report using a division, a building group, or a specific center. Note: Center names listed come from the CMS database. Therefore, this list will reflect the legal entity name for each center, as reported to CMS.



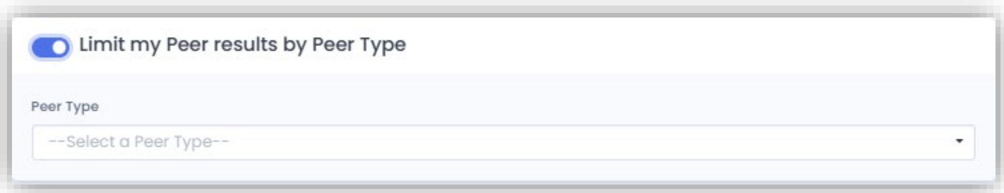
4. **Limit my peer results geographically**: Use this section to select peers in the same (State/County/Zip Code etc.) as your centers or peers in a specific area other than where your centers are located. (Please see glossary for definitions of geographic areas).
   a. ***<u>Only Peers that are in the same</u>***:



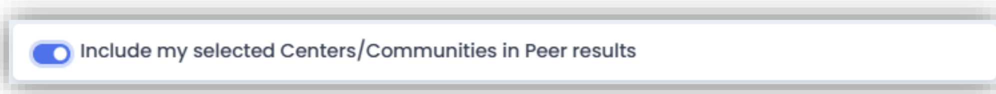
   b. ***<u>Only Peers that are in these areas</u>***: Gives you the option to choose specific state(s), county, city, etc. and has an option for "Saved Custom Geography" (see report customization to learn more)



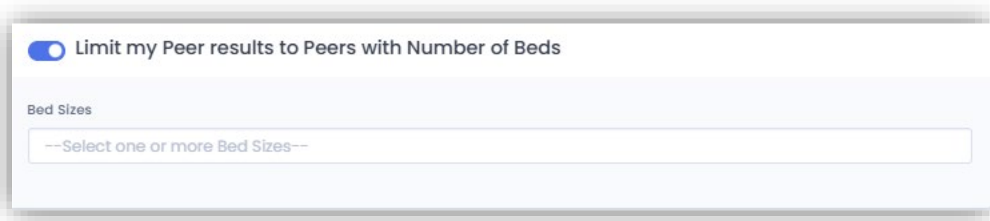
5. **Limit my Peer results by Peer Type**: Check this box to compare centers based on demographic factors such as ownership, center type, urban/rural etc. (Please see the glossary for more information) Note: You may select only one group from the drop-down box.



   a. "Include my selected centers in peer results" By default, your center(s) are excluded from the peer data reported. Check this box if you would like to include your center(s)' data in the peer comparison group



6. **Limit my Peer results to Peers with Number of Beds:** Check this box to compare centers based on bed sizes.

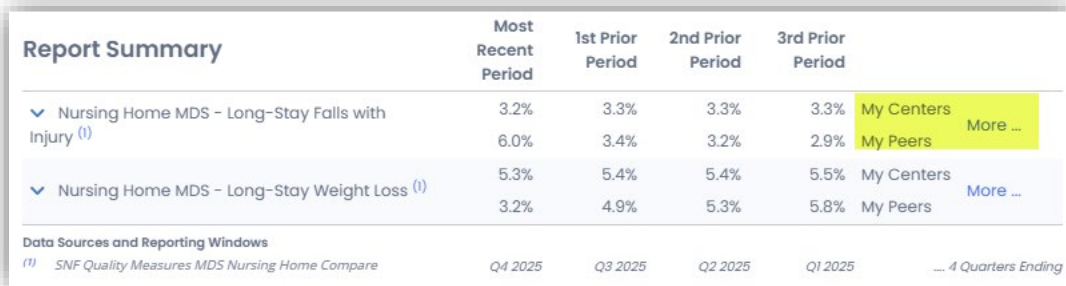


7. Once finished with your selections, please hit the Run Report Now button to go to the report screen.

How to Read the Reports, See Charts and Get More Detail:

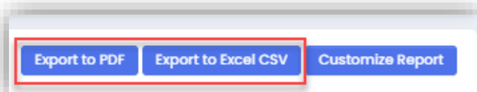
On the report screen the data will be divided by "***My Centers***" and "***My Peers***." "***My Centers***" is the center or centers that you have selected for your organization and "***My Peers***" is the peer group that you have selected.

Reporting periods vary by individual report, and you may select "***More***" to see historical data or more detailed data.

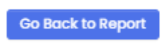


Report Summary	Most Recent Period	1st Prior Period	2nd Prior Period	3rd Prior Period		
Nursing Home MDS - Long-Stay Falls with Injury (1)	3.2%	3.3%	3.3%	3.3%	My Centers	More ...
	6.0%	3.4%	3.2%	2.9%	My Peers	
Nursing Home MDS - Long-Stay Weight Loss (1)	5.3%	5.4%	5.4%	5.5%	My Centers	More ...
	3.2%	4.9%	5.3%	5.8%	My Peers	
Data Sources and Reporting Windows						
(1) SNF Quality Measures MDS Nursing Home Compare	Q4 2025	Q3 2025	Q2 2025	Q1 2025		... 4 Quarters Ending

1. You can export the data to ***Excel*** or export the report to a ***PDF*** file by clicking on the blue buttons.



2. Once you click on "***More…***" a screen with a chart and a table will appear. This will allow you to see more historical data for your centers against the selected peer group. You have the option of printing, this page, exporting to excel or exporting the chart. 

3. If you want to return to the report, hit the 

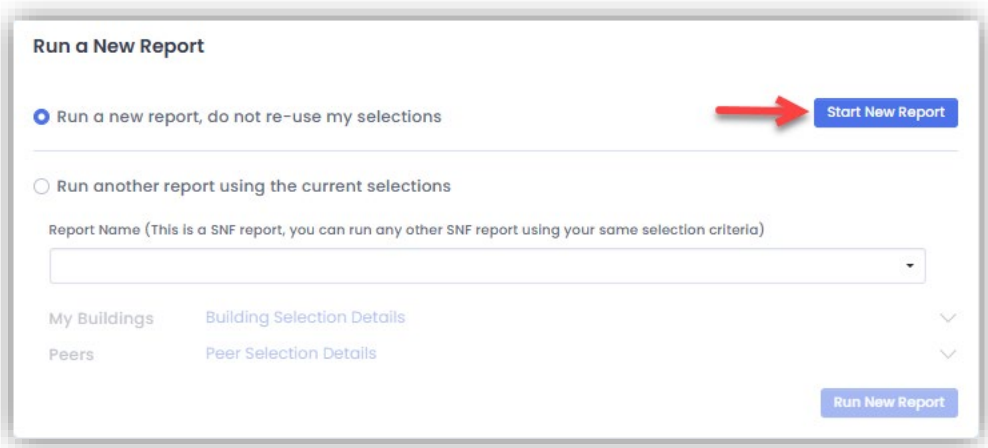
button on the bottom of the screen.

Creating a New Report

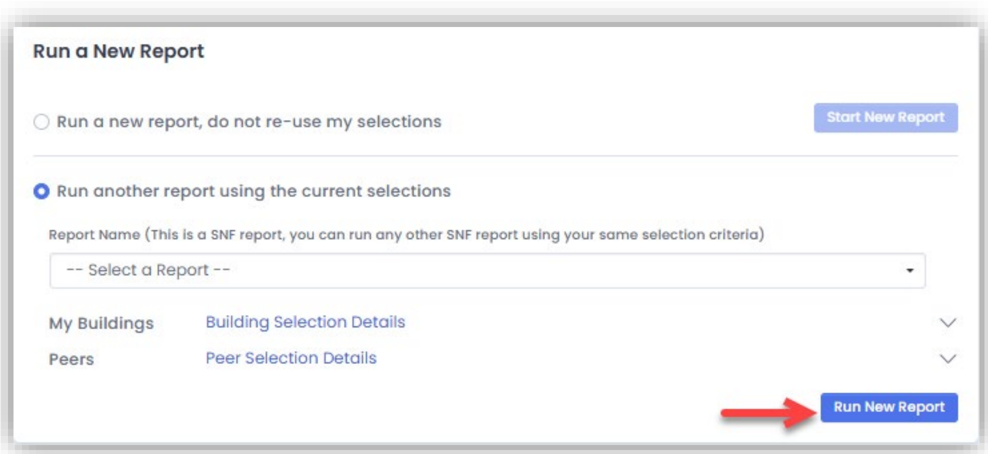
If you want to build a new report, please select the build new report button on the bottom of the screen or select "Run a Report" on the left-hand side of the screen.

On the bottom of the report page, you have the option to ***Start New Report***.

1. If you select "***Run a new report, do not re-use my selections***" and click the "***Start New Report***" button, you will return to the report builder screen to select your new report, centers and peer groups.



2. If you would like to see a different report for the same centers and peer groups you originally selected, click "***Run another report using the current selections***", then use the drop-down menu to choose the report you would like and hit the "*Run New Report*" button.

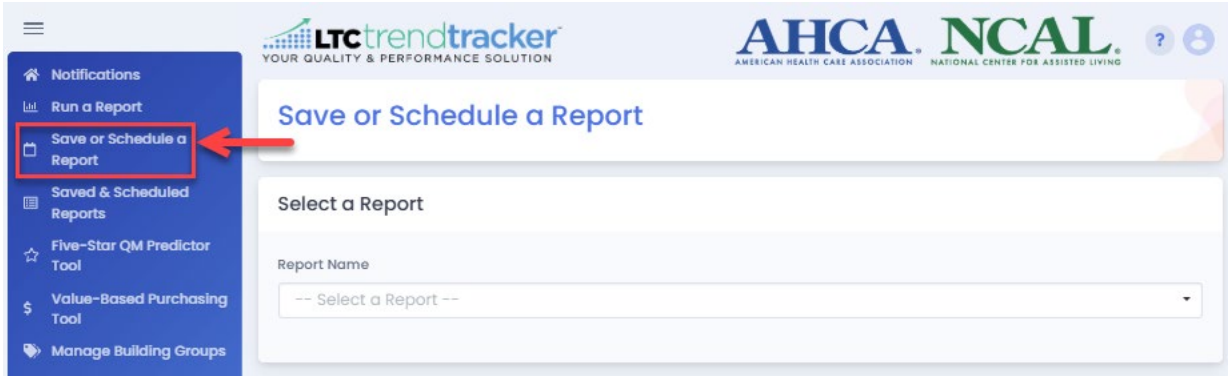


Saving & Scheduling Reports

LTC Trend Tracker provides users with the ability to save reports, once designed, so that you can come back and re-run the same report at a future time quickly and easily. Two options are available – scheduling reports and saving reports.

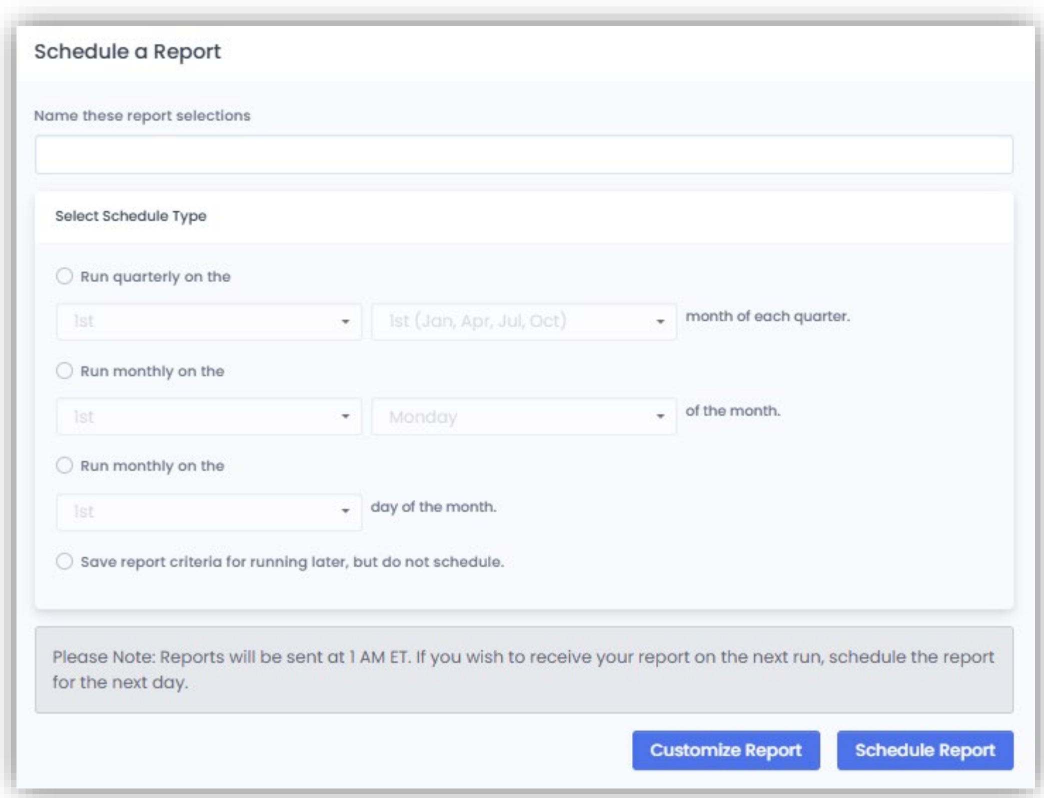
This allows the user to define and save desired reports and either (1) have the system automatically generate these reports and email the user when they are available or (2) see a list of saved reports and run them at any time on-demand with one click. Scheduled reports can be set up to run on a monthly or quarterly basis.

1. Select "**Save or Schedule a Report**"



2. Follow the same steps listed in the previous section to design the report: select the type of report, the included centers, geographic criteria and peer groups.

3. After the report design is complete, at the bottom of the window users will see the following options:



4. In the text box, give the report you wish to schedule or save a title of your choice.

5. If you would like to schedule the report to run automatically, select form among the three timeframes listed:
    a. Quarterly on specific day (1st, 2nd, 3rd, etc.) of the month of each quarter
    b. Monthly on a specific weekday of the month.
    c. Monthly on a given day of the month.

    Note: Scheduled reports are run 1am ET on the scheduled date. If you are scheduling a report, the earliest date you should select is the **next** day. If you choose the current date, the next time the report will be run is one month or quarter from now (depending on your timeline selection).

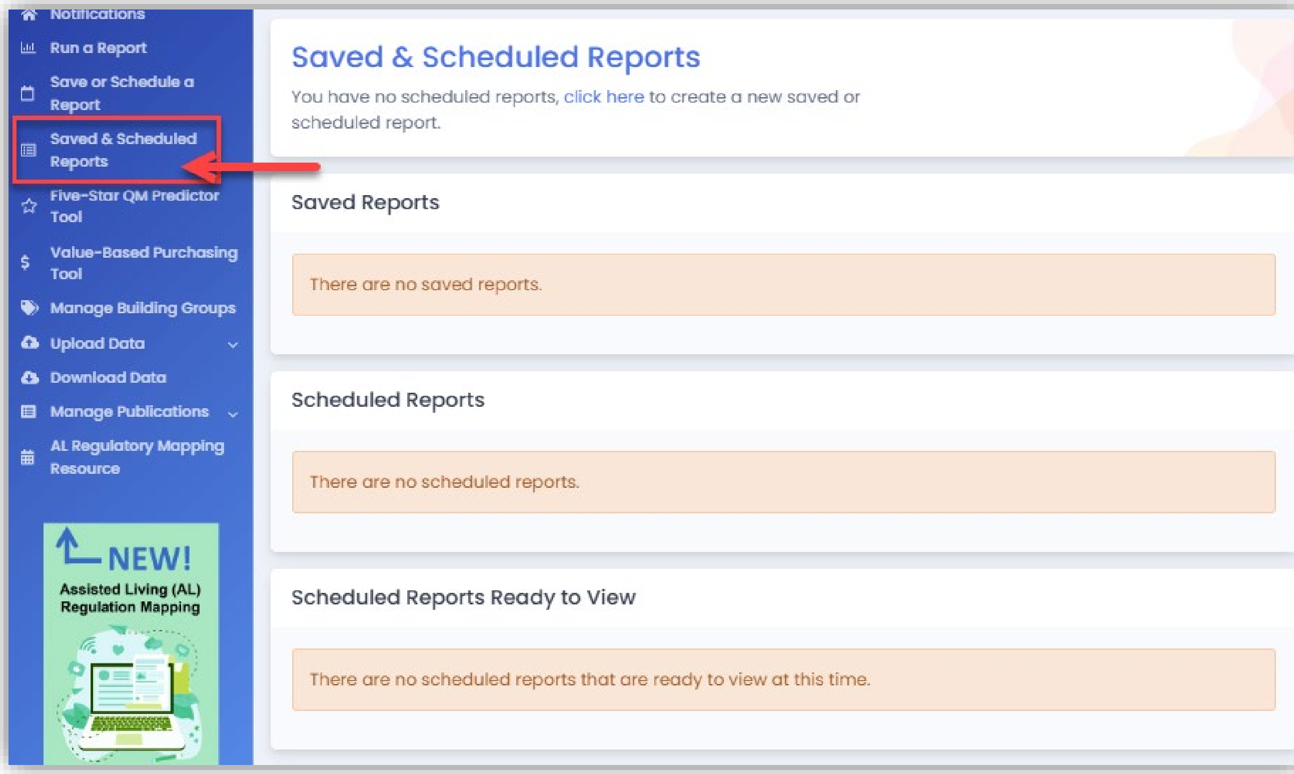
6. If you do not want to schedule a report to run automatically but would like to save the criteria for a report you have designed to use it in the future, select the "***Save report criteria for running later, but do not schedule***" option.

7. Whether scheduling or saving a report, click the blue "***Schedule Report***" button at the bottom of the screen to save all your selections.
    a. If you would like to customize the saved/scheduled report such as, click the "***Customize Report***" button. You will be directed to a page where you can customize the selected report such as adding/deleting
    which measures should be shown on the scheduled/saved report. Be sure to click the blue "***Schedule Report***" button on this page to save your selections.

When a report you have scheduled is ready, you will receive an e-mail from reports@ltctrendtracker.com alerting you that it has been run.

Accessing Saved & Scheduled Reports

8. When you log in to LTC Trend Tracker, the scheduled reports that have been run will be displayed on the LTC Trend Tracker homepage. Simply click on the report that is ready to be viewed and the report will be downloaded. They can also be found under "***Saved & Scheduled Reports***" on the left-hand navigation pane.



9. Under "***Saved Reports***", a complete list of all the reports a user has *saved* will be displayed.
    a. Under the ***Name*** column, the name of the report created by the user will be listed along with all of the selected criteria.
    b. ***Run Now***… will generate the report using your saved criteria.
    c. ***Remove***… will delete this report from your saved list.

10. Under "***Scheduled Reports***", a complete list of all the reports a user has *scheduled* will be displayed.
    a. Under the ***Name*** column, the name of the report created by the user will be listed along with the frequency of when it is generated.
    b. ***Report*** will list the type of report with all of the selected criteria.
    c. ***Started*** will display the date when the scheduled report was started
        i. ***Run Now***… will allow you to run the report outside of the scheduled date.
        ii. ***Remove***… will delete this report from your scheduled list.

11. Under "***Scheduled Reports Ready to View***", a complete list of all the scheduled reports that are ready to be viewed will be displayed.
    a. Under the ***Name*** column, the name of the report created by the user will be listed along with the frequency of when it is generated.
    b. ***Report*** will list the type of report with all of the selected criteria.
    c. ***Run Date***… will display the latest date the scheduled report was generated.

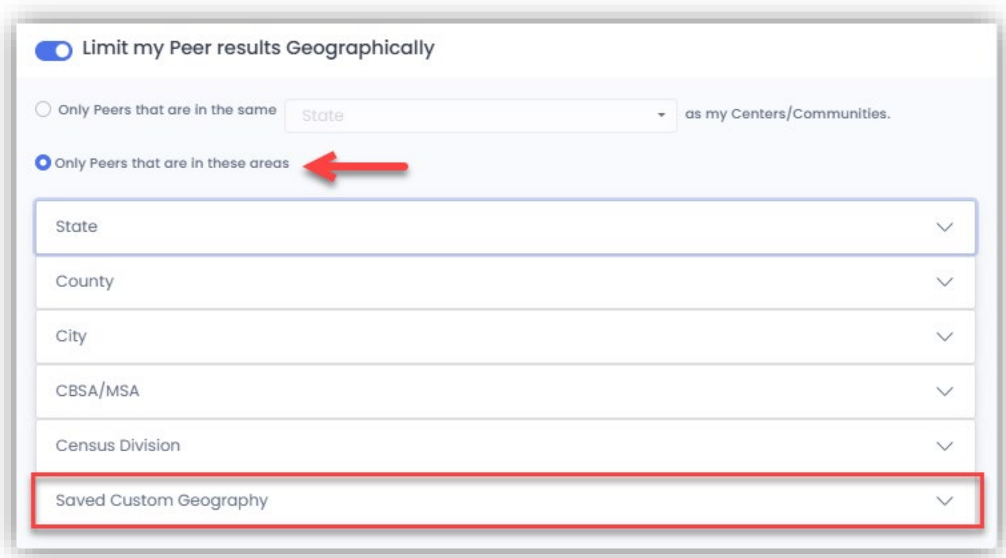
i. ***View***…will display the latest version of the scheduled report.

Customizing Your Report(s)

LTC Trend Tracker provides users with the ability to customize reports. This section provides an overview of certain customization options.

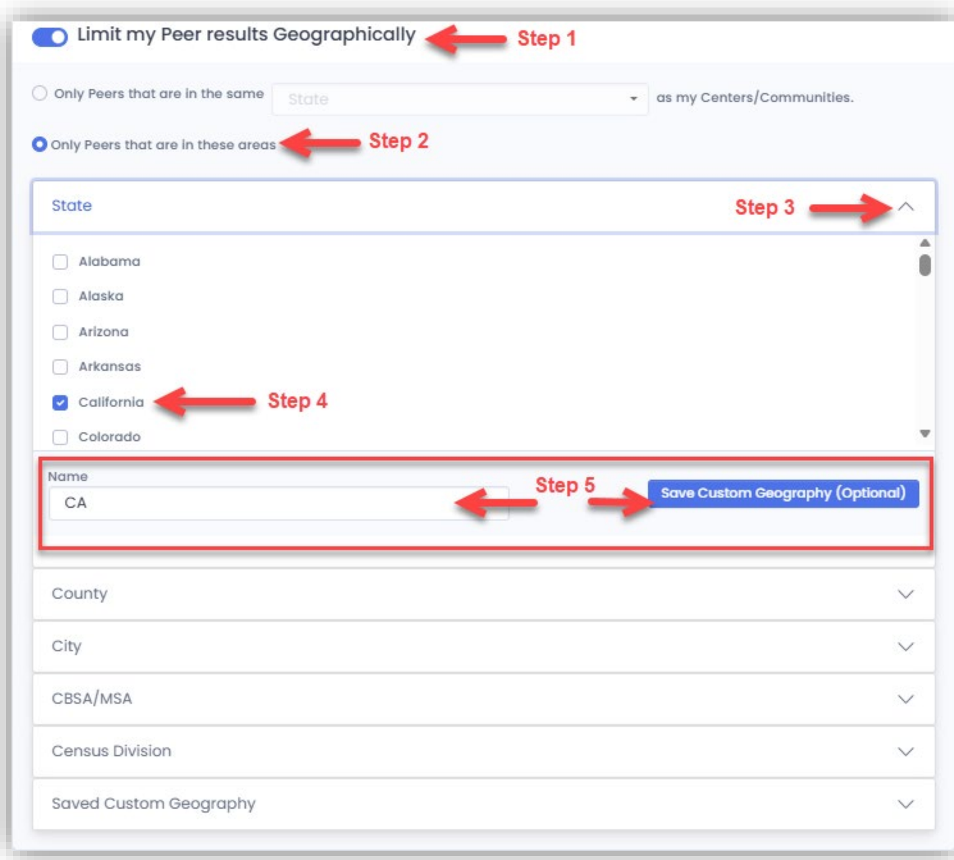
Customizing your peer groups geographically

"***Only Peers that are in these areas***" has an option for "***Saved Custom Geography***". Selecting this allows you to compare your results to certain peer groups such as state, county, or others. Once you make your selections, they will be saved for you to use in the future.



1. To create a custom geographic peer group, select "***Only Peers that are in these areas***" then click "***State***," "***County***," "***City***," "***CBSA***" or "***Census Division***" and select the desired geographic region. In the bottom box, add a label for your custom geographic criteria.
2. Then click the ***Save Custom Geography (Optional)*** button

For Example, if a user were to make California a Saved Custom Geography they would follow the steps below.



3. To use your customized peer group, select "***Only Peers that are in these areas***" and then "***Saved Custom Geography***." All custom geographic peer groups you have previously saved will be shown in a list for you to select from.
   a. Your custom peer group(s) will be available every time you run a report.