

Running the Report Template

The Report template allows you to generate the assessment report. We recommend running this template **after** you have run the Test Results template because some of the information that has been entered while running that template will automatically populate sections of the Report. To run the Report template:

1. If you are not already in the **User Templates** folder, click on the **User Templates** link in the **Favourite Folders** area.
2. Click on the **Report.xdtpx** template in the **User Templates** folder. The Report interview is displayed.

Report

Client

Organization or Firm

General Information

Report Sections

Background and Observations

Cognitive/Intellectual

Fine/Visual-Motor/Speed Integration

Memory and Learning

Attention Span

ClientLast Name *

Client Information: If you have already created a dataset for this client you should load it rather than re-enter client information. Click on Data Options and select Use Other Data, then choose the dataset for the client.

First Name *

It is your responsibility to exercise sound clinical judgment and ensure that all documents created by this system are accurate and suitable to the needs of your client

Client is on medication

Yes No

If so please elaborate

Date of Birth (mm/dd/yyyy)

3. If you have previously entered information for the same client, you should load the information for that client. To load existing client data, hover over the **Data Options** button near the top left of the page and select **Use Other Data**. Locate the dataset for the client you want and select it. The information for that client will be loaded into the interview.
TIP: You can tell whether the information has been loaded for a client by clicking on the Client tab. If the client's first name and last name fields are blank, then it means that you have not loaded the existing client data. The asterisks beside the last name and first name fields mean that those two fields must be filled in before you can assemble a document. If the first and last name fields are filled in, it means that you have already loaded the information or you have typed in values.
4. The Report interview has several tabs arranged vertically on the left side of the page. The tabs relate to the various sections of the Report. You can click on any tab to go to it, or you can use the **Next** or **Back** buttons to progress or back in the interview one page at a time.
5. The **Report Sections** tab allows you to choose which sections you want to include in the Report that you are creating. There may be some circumstances where you wish to streamline a Report

by eliminating sections that are not relevant, or where the scope of your report is focused on specific areas (such as academic).

Report

Client	Choose the Sections you want to include in the Report
Organization or Firm	<input checked="" type="checkbox"/> Background Information
General Information	<input checked="" type="checkbox"/> Observations
Report Sections	<input type="checkbox"/> Show Functional Implications (Strengths and Needs) near end of report in a table
Background and Observations	<input checked="" type="checkbox"/> Results and Interpretation
Cognitive/Intellectual	<input checked="" type="checkbox"/> Cognitive - Results and Interpretation
Fine/Visual-Motor/Speed Integration	<input checked="" type="checkbox"/> Visual-Motor/Processing Speed - Results and Interpretation
Memory and Learning	<input checked="" type="checkbox"/> Memory & Learning - Results and Interpretation
Attention Span	<input checked="" type="checkbox"/> Attention Span - Results and Interpretation
Executive Functioning	<input checked="" type="checkbox"/> Executive Functioning - Results and Interpretation
Reading	<input checked="" type="checkbox"/> Academic Testing - Results and Interpretation
Writing	<input checked="" type="checkbox"/> Social/Emotional/Behavioral Functioning - Results and Interpretation
Math	<input checked="" type="checkbox"/> Summary and Formulation
Social/Emotional/Behavioral	<input checked="" type="checkbox"/> Recommendations
	<input checked="" type="checkbox"/> General Considerations Recommendations

By default, all sections of the Report are checked, meaning that you will be asked questions about all of those areas and there will be a section for each area in the assembled document. If a section is not relevant or you wish to skip it, you can uncheck that section. There are two checkboxes, "**Results and Interpretation**" and "**Recommendations**" which, if unchecked will eliminate all Results and Interpretation sections of the Report, or all Recommendations sections, respectively. One of the impacts of unchecking a checkbox is that some tabs will disappear from the list of tabs on the left. In addition, unchecking some checkboxes, such as Recommendations, will remove certain questions that appear on a tab. It's your choice as to how detailed or streamlined your report will be.

There is one checkbox that is not preselected with the label "**Show Functional Implications (Strengths and Needs) near end of the report in a table**". If you leave this checkbox unchecked, then the functional implications will be displayed within each processing area (showing strengths and needs). If you check this checkbox, then instead of showing functional implications within each processing area they will be displayed in a chart near the end of the report showing Strengths in the left column and Needs in the right column. Whether you select the checkbox will depend on your personal preferences or on how you feel the report should appear for a particular client. We generally recommend that you leave the box unchecked so that functional implications appear within each processing area.

6. On the **Client** tab, make sure that you answer key questions relating to whether the **client is in school** and the **age/grade level** of the client. These fields are used to dynamically construct parts of the report and to filter choices that are available for functional implications and recommendations.
7. The **Background and Observations** tab has 2 or 3 editable text boxes for Background, School History and Observations respectively.

Report

Client	Background and Observations
Organization or Firm	Background and Observations
General Information	Background and Observations
Report Sections	Background and Observations
Background and Observations	Background and Observations
Cognitive/Intellectual	Background and Observations
Fine/Visual-Motor/Speed Integration	Background and Observations
Memory and Learning	Background and Observations
Attention Span	Background and Observations
Executive Functioning	Background and Observations
Reading	Background and Observations
Writing	Background and Observations
Math	Background and Observations
Social/Emotional/	Background and Observations

Select a Background Clause from the Background History folder Collection

Add Select a Background Clause from the Background History folder...

Text to summarize background information

Describe any previous assessments

Select an Observation Clause from the Observations folder Collection

Add Select an Observation Clause from the Observations folder...

Text to summarize observations

8. You have a couple of options for entering the text for the Background area of the report.
 - a. In the "**Text to summarize background information**" textbox you can either type, dictate or paste text. If you are typing text you can also use special key combinations to format the text as you type (hover over or click the question mark box to the right of the field to see your options - these are the same shortcuts that you use in Word for bold, underlining and italics respectively). If you use this approach you can modify the text.

Tip: The **Text to summarize background information** text box is one of many text edit areas in the Report interview that allow you to enter multiline text. Notice that there is a question mark icon to the right of the text box, which, if clicked, gives an explanation as to how you can enter text that is bolded, underlined or in italics. If you want to enter some bold text in a paragraph you can type CTRL-B (Command-B on a Mac). It doesn't visually bold the text that you will enter but it puts in some special characters that will cause the text to be bolded in the assembled document. When you click CTRL-B it inserts the following text at the cursor: `*[]*`. You then need to click between the two square brackets and type the text that you wish to be bolded. For example, if you want the word "definitely" to be bolded in the sentence: "You should definitely do this.", then you should type CTRL-B where the word definitely would appear and then type "definitely" between the square brackets, like this:

You should `*[definitely]*` do this.

In the assembled document it will appear as:

You should **definitely** do this.

Similarly, CTRL-I (Command-I on the Mac) inserts `/[]/` into the text box, and CTRL-U inserts `-[]-`. You would place your cursor between the square brackets and type the text to be italicized or underlined.

For example

You should `/[definitely]/` do this.

would appear in the assembled document as

You should *definitely* do this.

and

You should `-[definitely]-` do this.

would appear in the assembled document as

You should definitely do this.

Note that you can't combine bold, underlining and italics. Only one formatting type can be applied to any portion of text.


9. You can complete the sections about School History (if applicable) and Observations in a manner similar to what is described for Background History in step 7.
10. There are tabs for each of the following processing areas: **Cognitive/Intellectual, Fine/Visual-Motor/Speed Integration, Memory and Learning, Attention Span, Executive Functioning, Reading, Writing, Math, and Social/Emotional/Behavioral**. For each of these tabs, you will have the opportunity to:
 - a. Dictate, type or paste in text to discuss the results of testing in that processing area.

- b. Select from an array of functional implications for the client in that area. To choose functional implications,
- Click on the icon to the right of the box with the prompt: "Choose Cognitive/Intellectual functional implications" (in the case of Cognitive/Intellectual tab -- prompt will vary depending on the processing area):

Choose cognitive/intellectual functional implications




- Select the functional implications that you want to use in the report. Each checkbox chooses one paragraph or bullet point that will be included in the report. The captions that you see beside each checkbox are short-form descriptions of longer text that will be inserted into the report. The checkboxes are organized from strengths near the top to weaknesses near the bottom.

Add selected rows to interview 

1/1 200

<input type="checkbox"/> Good learning potential	<input type="checkbox"/> Conceptualizes verbal and nonverbally	<input type="checkbox"/> Can categorize well
<input type="checkbox"/> Inquisitive/stimulated by challenging tasks	<input type="checkbox"/> Difficulties sorting essential/unessential	<input type="checkbox"/> Poor with open-ended
<input type="checkbox"/> General comprehension difficulties	<input type="checkbox"/> Weak critical thinking	<input type="checkbox"/> Easily swayed by extraneous info
<input type="checkbox"/> Blamed for not trying	<input type="checkbox"/> Smart but low mental flexibility/think outside box	<input type="checkbox"/> Needs time to adjust to demands
<input type="checkbox"/> Difficulties categorizing/drawing conclusions	<input type="checkbox"/> Understands/communicative with language	<input type="checkbox"/> Prefers language>visuospatial activities
<input type="checkbox"/> Prefers verbal>nonverbal types of courses	<input type="checkbox"/> Uses language to mediate nonverbally	<input type="checkbox"/> Hard to express/good with multi-choice
<input type="checkbox"/> Good vocabulary	<input type="checkbox"/> Good with factual info	<input type="checkbox"/> Categorizes verbally
<input type="checkbox"/> Theoretical social reasoning	<input type="checkbox"/> Advanced social insight	<input type="checkbox"/> Good general knowledge
<input type="checkbox"/> Proverb awareness	<input type="checkbox"/> Visuospatial>language skills	<input type="checkbox"/> Good interpretation nonverbal info
<input type="checkbox"/> Prefers nonverbal>verbal types of courses	<input type="checkbox"/> Assembles from diagrams	<input type="checkbox"/> Visually categorizes info
<input type="checkbox"/> Visual pattern prediction	<input type="checkbox"/> Good at puzzles	<input type="checkbox"/> Interprets charts, diagrams
<input type="checkbox"/> Interprets visually if organized/untimed	<input type="checkbox"/> Lacks vocabulary to understand other info	<input type="checkbox"/> Poor vocabulary but recognizes
<input type="checkbox"/> Misunderstands info communicated/directions	<input type="checkbox"/> Doesn't know what «GetV[HeShe]» has missed	<input type="checkbox"/> Weak general knowledge
<input type="checkbox"/> Poor general knowledge/weak reading or memory	<input type="checkbox"/> Tongue tied/word retrieval	<input type="checkbox"/> Poor open-ended questions/expressing self
<input type="checkbox"/> Difficulty with oral/written communication	<input type="checkbox"/> Anxious with public speaking	<input type="checkbox"/> Verbally quiet/withdrawn/left out socially
<input type="checkbox"/> Feels misunderstood	<input type="checkbox"/> Poor expressing self/feels marginalized	<input type="checkbox"/> Poor expression, acts out physically
<input type="checkbox"/> Concrete/literal	<input type="checkbox"/> Misses subtle nuances in language	<input type="checkbox"/> Overly verbose
<input type="checkbox"/> Less confident visual/hands-on tasks	<input type="checkbox"/> Struggles to interpret charts, diagrams	<input type="checkbox"/> Poor assembly skills
<input type="checkbox"/> Poor math, physical sciences	<input type="checkbox"/> Poor visualizing/sequencing	<input type="checkbox"/> Weak organization/time management
<input type="checkbox"/> Overloads with visual details	<input type="checkbox"/> Poor sense of direction	<input type="checkbox"/> Misses visual cues/body language

Add selected rows to interview 

- Click on the "Add selected rows to interview" link that appears above or below the list of checkboxes. You will be returned to the tab for the current processing area. **Tip: Even though it does not show what options you have selected, the text will show you how many items have been selected. The software remembers what choices you have made and the selected paragraphs will appear in the output document.**

11. You can repeat the above steps for each of the Results and Interpretation areas.


12. On the **Summary and Formulation** tab you can:

- Type, dictate or paste text into the textbox with the label "Summary and Formulation"
- Select custom clauses from the Summary and Formulation folder using the same technique as described in paragraph 7(b).


13. Click on the **Recommendations** tab. You can enter or select recommendations in several different categories: General, Personal Development, Cognitive, Attention/Retention, Executive Skills, Reading, Writing/Fine-motor, Math and Test-taking. For each category of recommendation you can:

- a. Type, dictate or paste your own recommendation
- b. Select from a list of possible recommendations (there are more than 250 pre-defined recommendations that you can choose using checkboxes). To select recommendations within the category:
 - i. Click on the icon to the right of the box with the prompt: "Choose General recommendations" (in the case of General -- prompt will vary depending on the recommendation category):

Choose General Recommendations




- ii. Select the recommendations that you want to use in the report. Each checkbox chooses one numbered paragraph that will be included in the report. The captions that you see beside each checkbox are short-form descriptions of longer text that will be inserted into the report.

Add selected rows to interview 

1/1 200

<input type="checkbox"/> Access to EA	<input type="checkbox"/> Adaptive technologist	<input type="checkbox"/> Adaptive technology bursary and training
<input type="checkbox"/> Autism Resource	<input type="checkbox"/> Balance course load	<input type="checkbox"/> Gifted
<input type="checkbox"/> Identify and provide IEP	<input type="checkbox"/> Identify and provide IEP (bright)	<input type="checkbox"/> Identify as ADHD but treat like an LD
<input type="checkbox"/> Identify for post-secondary	<input type="checkbox"/> Identify with LD/Mental health needs	<input type="checkbox"/> Identify with multiple needs
<input type="checkbox"/> IPRC/IEP Process	<input type="checkbox"/> LD Resources	<input type="checkbox"/> Monitor mental health and LD needs
<input type="checkbox"/> Must have technology	<input type="checkbox"/> Needs advocate	<input type="checkbox"/> Needs calm environment
<input type="checkbox"/> Needs calm environment	<input type="checkbox"/> Needs transition plan as moves up in school	<input type="checkbox"/> OT/PT
<input type="checkbox"/> Own dorm room	<input type="checkbox"/> Reduced load/full-time student status	<input type="checkbox"/> Special Needs Camps
<input type="checkbox"/> Speech/lang	<input type="checkbox"/> Vocational/career guidance	<input type="checkbox"/> Young, "work in progress"

Add selected rows to interview 

- iii. Click on the **"Add selected rows to interview"** link that appears above or below the list of checkboxes. You will be returned to the tab for the current processing area. Tip: When you have made some selections and return to the Recommendations tab, you will see the number of recommendations that you have selected in the area after the prompt (e.g. 6 item(s) selected). The software remembers what choices you have made and the selected paragraphs will appear in the output document.

14. When the system is finished assembling, a link will appear in the right pane for a file called, for example, **Smith - James Report.docx** (there may be a number before docx which will vary depending on how many documents have been assembled with the same client).

15. You can click on the link to open the document that was assembled. A message may appear near the bottom of your browser giving you the option to open or download the file. If you select to Open the file it will appear in your word processor (Microsoft Word, typically).
16. Click on the **Explorer** icon at the top right of the page to return to the default view. The **Favourite Folders** area should now be visible at the bottom left of the page.