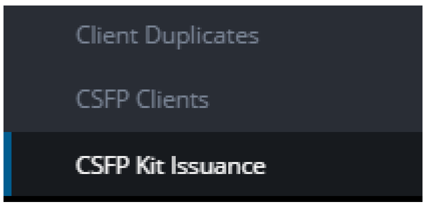
How Do I Create a CSFP Kit Issuance List? (US Only)

Step-by-Step Guide

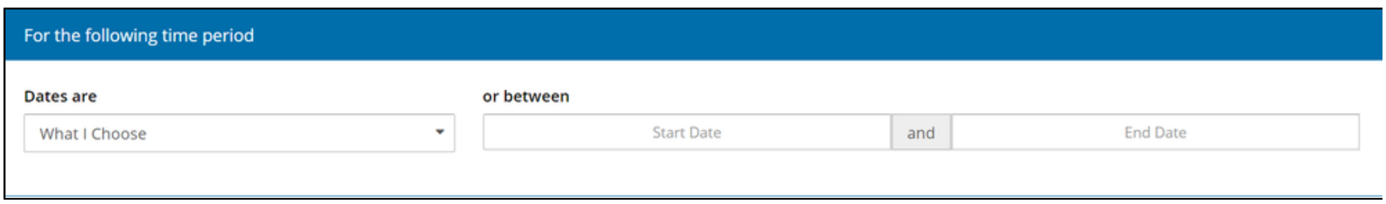
> This list creates a more detailed list of the client's CSFP ID, Status, Proxy, Last Visit Date and Location, Kit Size along with the client's contact information. For a list of general list of client information, including their name, status and contact information, please see How Do I Create a CSFP Client List? (US Only)

The CSFP Client Kit Issuance list will display a list of clients who have the organization the user is logged into as their "Official Location" despite where they have visited.

- Click on the "Clients" heading on the left-hand side of the screen. Then click on "CSFP Kit Issuance".



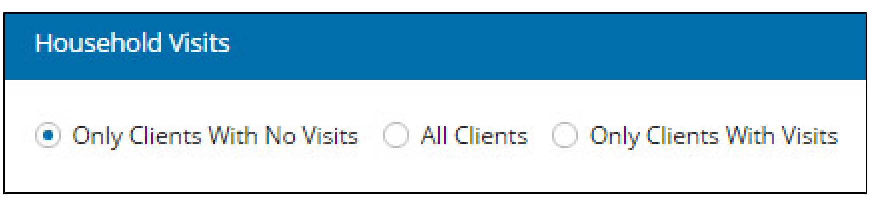
- Enter the dates for the reporting period by clicking in the "Start Date" and then enter the "End Date".



- Select the organization(s) or group(s) of organizations you want to report on.
    - The organization is the "Location" on the CSFP tab of the client's profile.

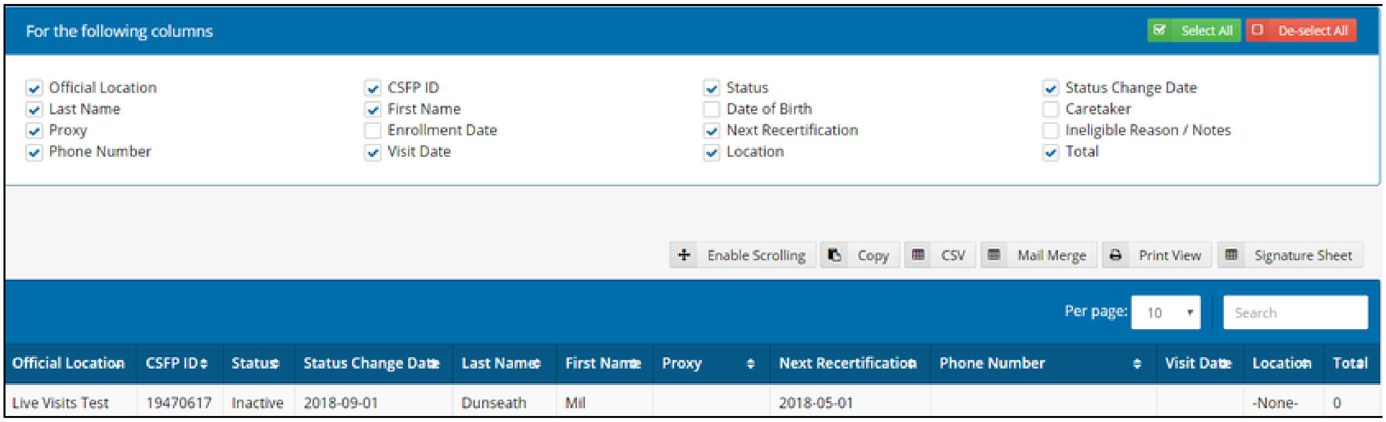
Choose your filter:

1. Only Clients With No Visits: clients who have not visited between the chosen dates
2. All Clients: all CSFP registered clients
3. Only Clients With Visits: clients who have visited between the chosen dates



Click on the "Create List" 

button:

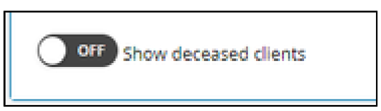


A list of column options will be shown. Default options will be checked off, but you can check off additional sections or remove the existing ones.

Column Descriptions

- Official Location: the location selected on the client's CSFP tab of their profile
- CSFP ID: the ID number entered on the client's CSFP tab of their profile
- Status: CSFP status of the client. See CSFP Tab for a list and description of the statuses
- Status Change Date: the date that CSFP status was changed. See CSFP Tab for a list and description of the statuses
- Last Name: the client's last name (Personal tab of their profile)
- First Name: the client's first name (Personal tab of their profile)
- Date of Birth: the client's date of birth (Personal tab of their profile)
- Caretaker: the name(s) of caretakers listed on the CSFP tab of their profile
- Proxy: the name(s) of proxies listed on the CSFP tab of their profile
- Enrollment Date: the enrollment date entered on the client's CSFP tab of their profile
- Next Recertification: the next recertification date and if it's recertification or renewal
- Ineligible Reason / Notes: the reason(s), if applicable, why the client is ineligible and any notes created while entering a CSFP visit.
- Phone Number: the client's phone number (Personal tab of their profile)
- Visit Date: the last date entered for a New CSFP Visit
- Location: the location of the user who entered the visit
- Total: total amount of kits provided

"Deceased" Toggle



The CSFP Kit Issuance List has a toggle button below the column options to decide if they would like deceased clients to show on the list or not. This is off by default.

Export Tools:

- Enable Scrolling: will allow you to scroll to the right if there are more items in the table that cannot currently be seen
- Copy will copy the data for the user to paste into a word processing document
- CSV will download the data for use in Excel
- Mail Merge will download the data for use in creating mailing labels
- Print View will put the data on a white background for printing without gridlines
- Signature Sheet will produce an Excel file that will include all of the fields in the report and add a column for a signature

> **Adobe Flash Player**
> Please note: Clicking on "Copy" and "CSV" require the use of Adobe Flash Player and will not work on Android or iOS devices.

Excel Tips:

Adjusting Row Height to Make Rows Larger for Signature: https://support.office.com/en-us/article/Change-the-column-width-and-row-height-72f5e3cc-994d-43e8-ae58-9774a0905f46

Video:

Related Articles

- How Do I Use a CSFP Case Load Report? (US Only)
- How Do I Use a CSFP Ethnicity Report (Duplicated)? (US Only)
- How Do I Use a CSFP Ethnicity Report (Unique)? (US Only)
- How Do I Create a CSFP Kit Issuance List? (US Only)
- CSFP Tab