

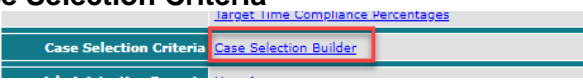
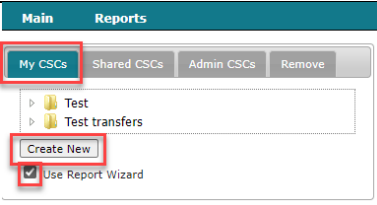

# SWIM – Access to Care

## Case Selection Builder

### Quick Reference Guide

To run most reports, the report criteria must first be defined using the **Case Selection Builder**. Follow the application prompts to select the desired criteria; these selections can be saved for use with other reports.



Complex criteria that includes/excludes specific values can also be used (e.g., specific procedures, certain diagnosis categories, specific ages of a patient, etc.), if you require something more complex than the directions below, please contact [SWIM@sharedhealthmb.ca](mailto:SWIM@sharedhealthmb.ca).

Case Selection Builder	
<p><b>1. Select the Case Selection Builder</b></p>	<ul style="list-style-type: none"> <li>From the <b>Reports</b> module, find the <b>Case Selection Builder</b> under <b>Case Selection Criteria</b></li> </ul> 
<p><b>2. Create New</b></p>	<ul style="list-style-type: none"> <li>Under <b>My CSCs</b>, click <b>Create New</b></li> <li>Ensure <b>Report Wizard</b> is checked</li> </ul> 
<p><b>3. Select Health Region</b></p>	<ul style="list-style-type: none"> <li>Double-click the desired <b>Health Region</b> under <b>Available Health Regions</b></li> <li><i>This will move the selected Health Region to the <b>Currently Selected Health Regions</b> side</i></li> <li>Click <b>Next</b></li> </ul>
<p><b>4. Select Health Centre</b></p>	<ul style="list-style-type: none"> <li>Double-click <b>Winnipeg</b> under <b>Available Health Centers</b></li> <li>Click <b>Next</b></li> </ul>
<p><b>5. Select Care Venues</b></p>	<ul style="list-style-type: none"> <li>Double-click the desired <b>Care Venue(s)</b> under <b>Available Care Venues</b>; if you want all <b>Care Venues</b>, select <b>All</b>.</li> <li>Click <b>Next</b></li> </ul> <div style="border: 2px solid green; padding: 10px; margin-top: 10px;"> <p> Depending on the provider(s) you have access to will determine the available Care Venues. Only Care Venues your provider works out of or where your provider's service is performed will be available</p> </div>
<p><b>6. Select Service</b></p>	<ul style="list-style-type: none"> <li>Double-click the desired <b>Service(s)</b> under <b>Available Services</b>; if you want all <b>Services</b>, select <b>All</b></li> <li>Click <b>Next</b> or <b>Finish</b></li> </ul>

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Case Selection Builder	
	 <p><b>Depending on the provider(s) you have access to will determine the available Services. Only Services your provider(s) belongs to will be available.</b></p>
7. Select Provider	<ul style="list-style-type: none"> <li>Choose from the drop-down list of services and select one service, then click <b>Load</b>.</li> <li>Double-click the desired <b>Provider(s)</b> under <b>Available Providers</b>; if you want all <b>Providers</b> for that service, select <b>All</b></li> <li>Click <b>Finish</b></li> </ul>  <p><b>This step allows you to limit your query to only certain providers. If you want all providers you have access to, skip this step by clicking Previous to go back to the Selected Services, then click Finish.</b></p>
8. Choose a Name	<ul style="list-style-type: none"> <li>Give the <b>Case Selection</b> a Name and type it into the <b>Case Selection Title</b></li> <li>Click <b>Done</b></li> <li>Return to the <b>Reports Dashboard</b> to run any of the reports in the <b>Reports from Case Selection</b> section</li> </ul>
9. Delete Case Selection	<ul style="list-style-type: none"> <li>From the Reports module, find the <b>Case Selection Builder</b> under <b>Case Selection Criteria</b>.</li> <li>Under the <b>Remove</b> tab, click the check box for the report you wish to delete</li> <li>Click <b>Remove Checked</b></li> <li>Confirm selection when the popup opens, click <b>OK</b></li> </ul>