HealthStream.
Community

CloudCME - Credits Report

Revised: 7/10/2023

‹ Back to Reports Overview
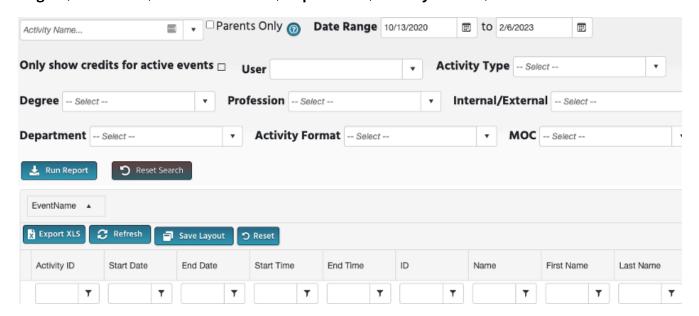
Table of Contents

Credits Report

The **Credits** report displays the continuing education credits awarded to users for a specific activity over a specified date range.

To access the **Credits** report, from the main menu, go to **Reports** > **Credits**.

1. Search for credit by **Activity** name, **Date Range**, **Active Event Credits, User, Activity Type, Degree, Profession, Internal/External, Department, Activity Format**, and **MOC**.
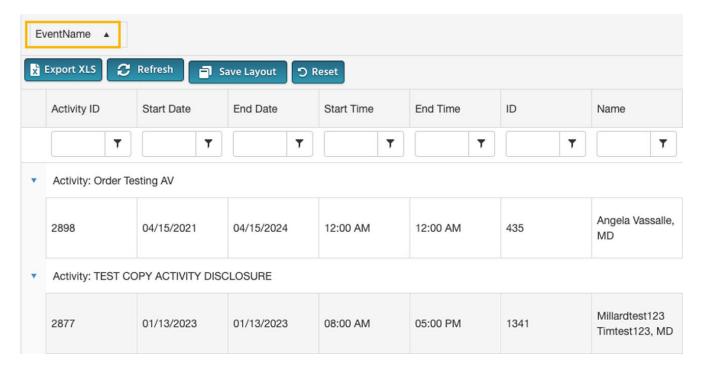
2. To view continuing education credits *for all* activities, remove the start and end date and click the **Run Report** button.

To view continuing education credits *for a specific* activity, select the activity from the activity drop-down, enter a date range and click the **Run Report** button.

> NOTE: **Activity Type**, **Degree**, **Profession**, and **Department** filters will correspond to selections provided on the **Administration > Defaults** screen.

View the Data and Export to Excel

Data can be filtered in a variety of ways such as choosing which columns display, arranging the columns in a specific order, and/or filtering the data using the filters. Also, the layout can be saved (columns, arrangement, filters) and data can be exported to Excel.
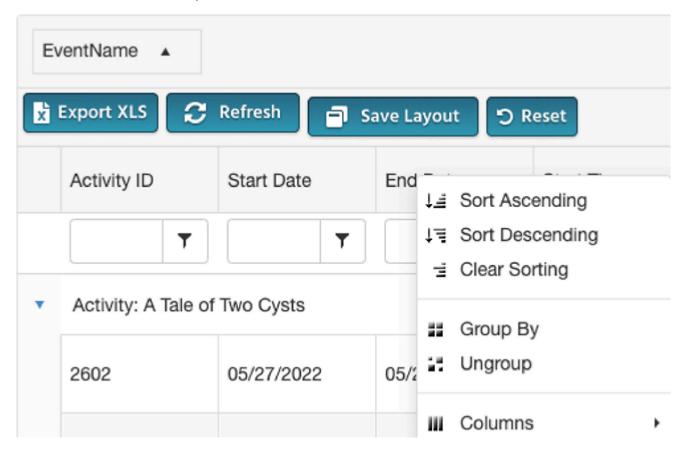

> NOTE: When exporting to Excel, the file will display any filtered data. Remove any filters, if all data will be exported.

> NOTE: **U**sers will receive a CSV file, rather than an XLS file, if the number of records returned based on the parameters exceeds the maximum for XLS files.

Choose Columns to Display

Right-click on any column and deselect/select columns on the **Data** tab. This layout can be saved (so only those columns are visible when users return to the report) by clicking the **Save Layout** button.

NOTE: To reset the layout click the **Reset** button.

Arrange Columns in Specific Order

Drag columns left or right to move them into the preferred order. To save the arrangement of the columns, click the **Save Layout** button.

Filter Columns

Data can be filtered by using the built-in filters in the columns. For example, to filter the list of registrants by a specific last name, type the last name in the field at the top of the **Last Name** column. Then, click the funnel beside it and select **Contains**. The screen will refresh and display only those users with that last name. More than one column can be filtered.

NOTE: To reset the filtered columns, locate the column(s) where a filter has been applied and click the funnel. Then, select **No Filter**. This will need to be done for all filtered columns.

#HealthStream   #CloudCME