# CaseWorthy – Running Active Client List

The instructions below were created from a CaseWorthy document addressing additional needs. It is linked here for your reference and contains links to further resources.

1. Ensure correct Role is selected. Click on arrow at top right corner to expand user area as displayed below.


2. Running the CAPER
   a. Click the wrench icon to switch to "Administration" > then click "Reporting" in left side menu > then click "Compliance Reports (Org)" as shown in screenshot below
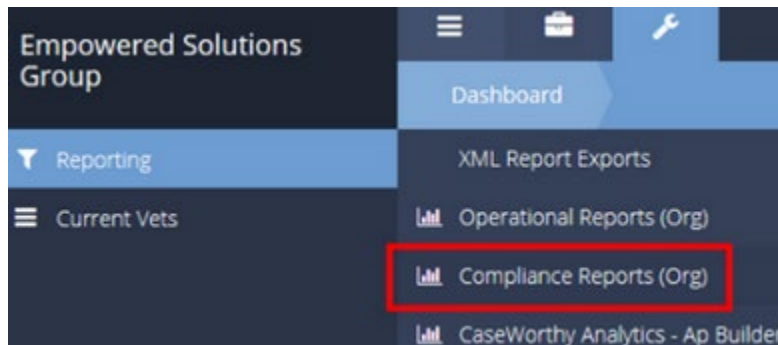
   b. Click on "ESG CAPER (2022) (Org)"
   c. Enter the report "Start Date" and "End Date"
      > Tip: For PATH monitoring purposes, an easy way to generate a client list from the past year is simply to use the date the report is run for the "End Date" and then 1 year prior as the "Start Date"
   d. Choose the "Project(s)" for which you wish to run the report
      i. Click the magnifying glass and select from list of programs. Then choose "Add Selected" once all programs are chosen.
      ii. Click "Report" button to launch the report. A pop up window will appear, and the report will load unless pop-up blockers are on
3. Accessing Client Detail Sub Report
   a. On page 2 of the report, click "Client Detail SubReport" hyperlink

Client Detail Sub Report ①
Hyperlink to Q5 and Q6 tables

    b. To export report to Excel, follow steps below
         i. Click on disk Icon > Choose Excel or other desired format listed > Save file, then locate downloaded file to review and edit
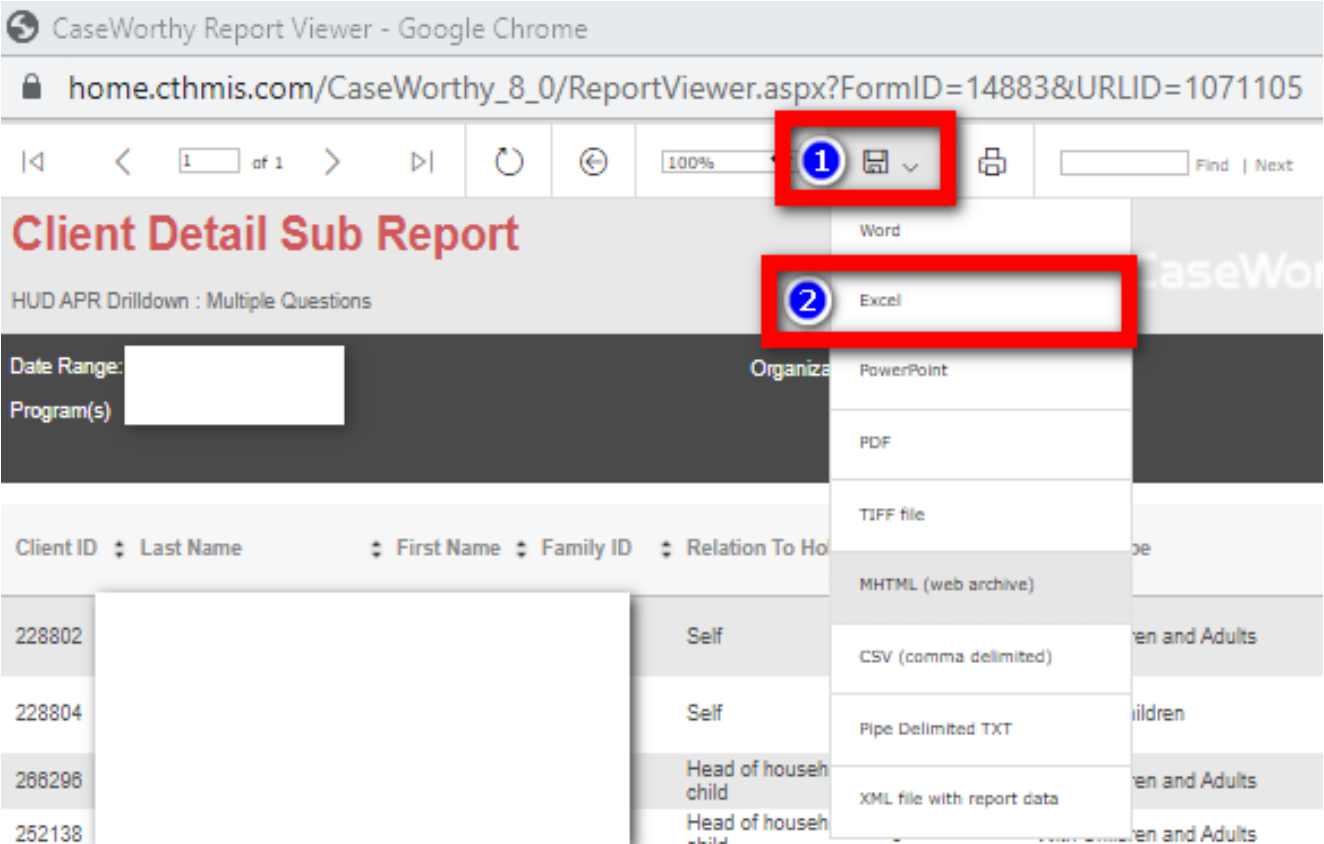
    4. Prior to submitting the Client List for PATH Monitoring, delete all columns of data except Client ID, Program Name, Enrollment Begin and Enrollment End.