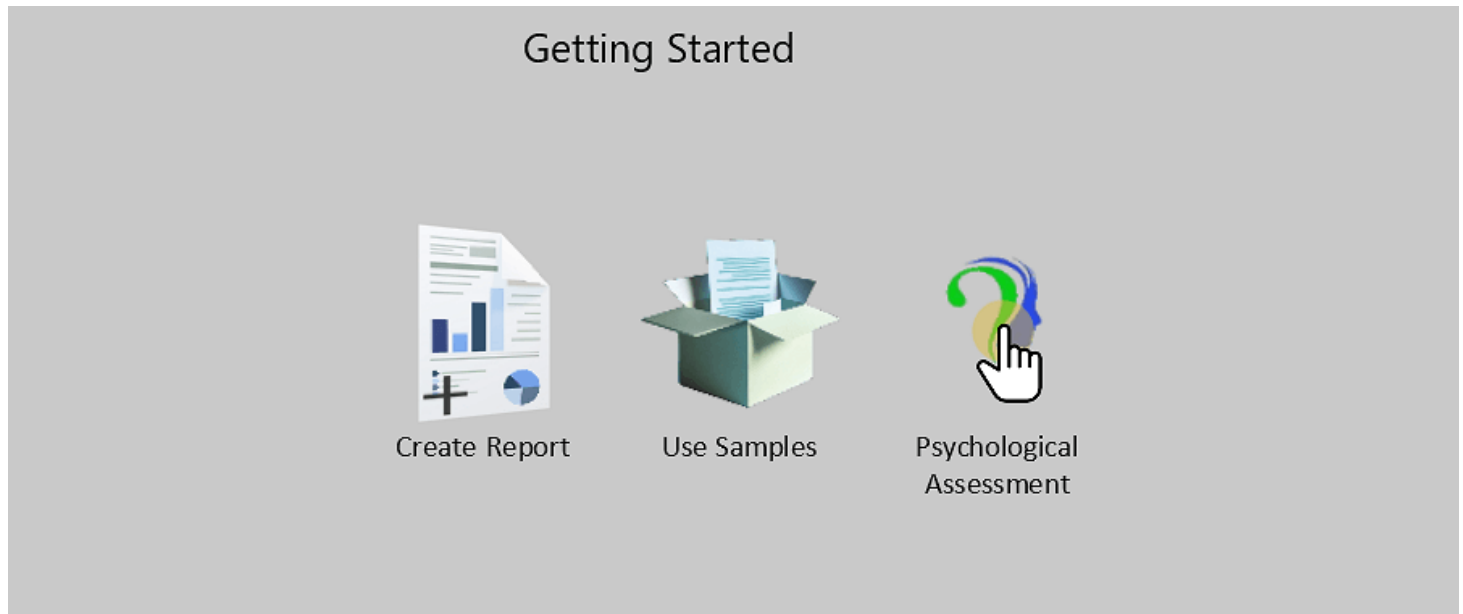# How to Build an Integrated Psych Report

This guide will demonstrate how to create an integrated psych report in the Report Builder app, test it with some fake data, and then use it to generate a report for one of your own clients.

1   Click Psychological Assessment

To get started, click Psychological Assessment on the Start Screen

FYI: Report Builder App Basic Info

Clicking on "Psychological Assessment" on the start screen will launch the Report builder app with psychological assessment report options preloaded for you.

The Report builder app is the place where you go to organize psychological assessment templates into an integrated psychological report. Here you will add ALL the sections and tests that you typically use for your client base.

The Report builder app is not for generating client-specific reports. The sections and test interpretations you select in the Report builder will be added to a "setup" tab in the Scribe app that can then be used to tailor and generate a client-specific report draft.

For example, if you typically administer the WISC-5 for younger clients and the WAIS-IV for older clients, add BOTH test sections when you set up your integrated report in the Report builder. Then, when you run a report for a client in the Scribe app, both options will be available to you, and you can choose the appropriate test at run-time.
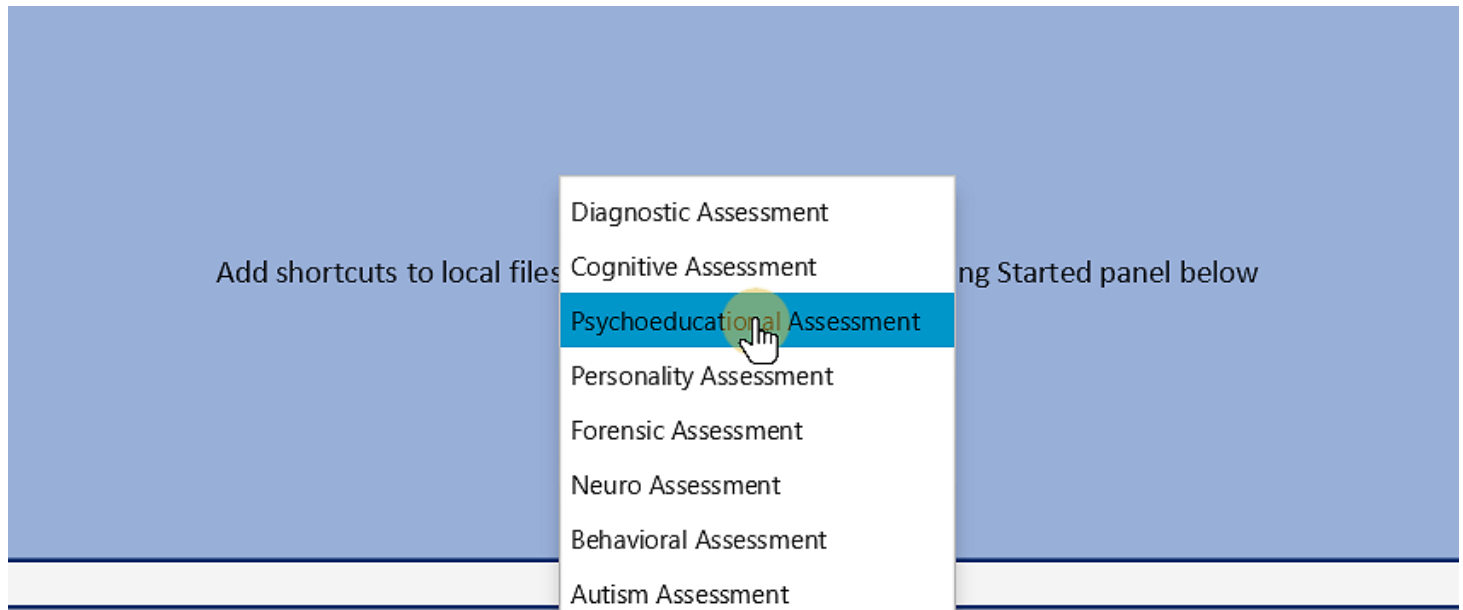
2 Select assessment type

Select the type of assessment report you wish to build. This will give you suggestions for different sections and tests you may wish to include in your report.

Don't worry if there are tests not included in the report definition that you want, as you can always add them later.

Add shortcuts to local files ~~ng Started panel below

Diagnostic Assessment
Cognitive Assessment
Psychoeducational Assessment
Personality Assessment
Forensic Assessment
Neuro Assessment
Behavioral Assessment
Autism Assessment

Tip: Don't fret about choosing a document type!

Document types are there to give you a starting point for building a report with popular sections and tests associated with the document type prepopulated in the report builder for you.

Your report is unique! So you will be able to add or remove sections and further customize your report build later.

3 Name your integrated report

Give your integrated report a name. When the report is built, it will store your new integrated report and all associated report templates in the folder you have selected in the left navigation panel.

This is where you go to select the folder you would like to store your report templates. Give the folder a star to make it a "favorite"

TIP: Set up your favorites folders!

The lefthand navigation panel shows you all the drives you have access to. It mirrors your File Explorer (Windows) or Finder (Mac).

Choose the folder where you would like to save your templates and your newly built report and make it a favorite by starring it.

Note that you can choose a different folder(s) to store your individual client files and generated client reports.

For example, many psychologists organize their clients by giving each client their own folder. If this is the case, it is suggested that you create a parent folder (e.g., "Assessments 2023") that you also star as a favorite, and then nest your client folders as subfolders underneath.

Also note that you can add shortcuts to your favorites folders and your most used reports on the start screen for quick access. Super convenient!

4 Set up your heading styles

Click the Heading setup button to change the heading styles pulled into your report.

○ Define ● Build   Subject: [Psychological Assessment ▾] ✎

📁 💾 🚫 ✨   [MyReport.xsl]   [Heading setup...]

[PSYCHOEDUCATIONAL ASSESSMENT]

ID Table - Student (ID = idTable-student; author = nSymbol)

ID Table - Adult (ID = idTable-adult; author = nSymbol)

FYI: Where the default headings show up in the report

The default headings for all psych reports from the Report builder app are as follows:

Heading 1: REPORT TITLE

Heading 2: Broad Section Titles (such as REASON FOR REFERRAL, BACKGROUND INFORMATION, BEHAVIORAL OBSERVATIONS, TEST RESULTS, etc.)

Heading 3: Specific Sections Titles (such as Academic History, Developmental History, etc., and test titles)

Heading 4: Not used in report builder

Heading 5: Not used in report builder

5   You can add and remove heading styles to match your brand

More style settings are available after your report is built. You can edit headers, footers, fonts, margins, etc., when you open the templates in the Scribe. Editing is availabe at the document, block (paragraph), and in-line levels in the Scribe.
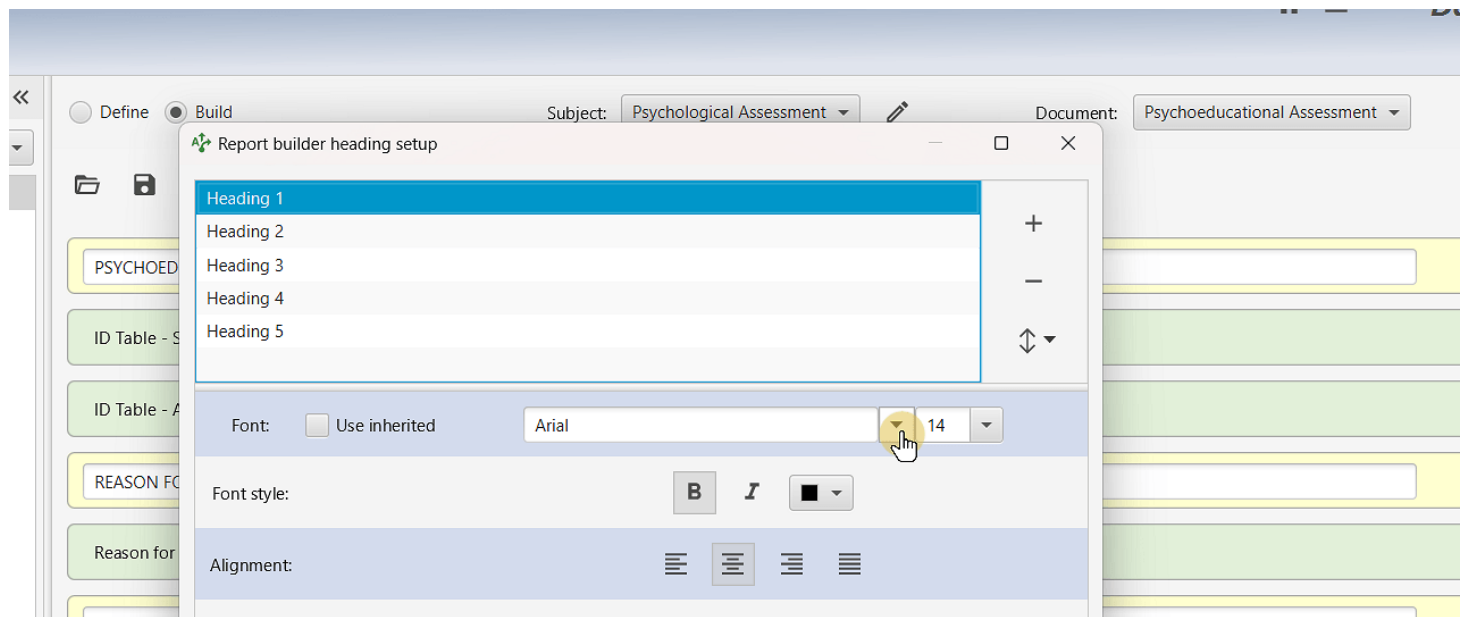
TIP: You don't need to add "Heading 3s" in the Report builder - but still give them a style

The Heading 3 "specific section titles" (such as the background information section titles and test titles) are auto-generated based on the background sections and tests you add in the Report builder.

YOU DO NOT NEED TO ADD THESE HEADINGS IN THE REPORT BUILDER APP - BUT YOU CAN STILL CHOOSE A STYLE FOR THEM

After the report is built, if you wish to edit or delete the level 3 Headings that have been auto-generated, you may do this in the Scribe App.

6 Add or remove sections

You can add, remove, or reorder sections by clicking the buttons on the right. You can also reorder by dragging and dropping sections.
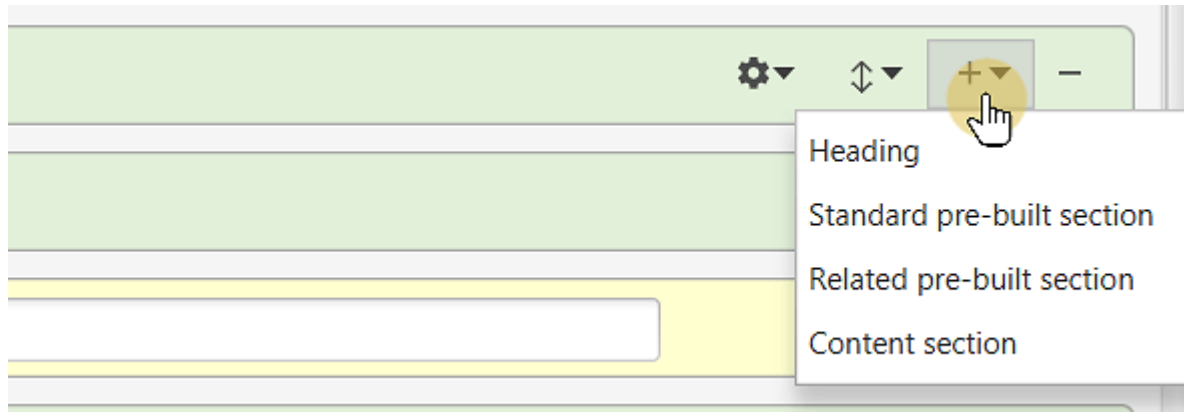
7 Lots of choice!

Want to add a section?

"Standard pre-built sections" are those that are included in your document type (e.g., "Psychoeducational Assessment").

"Related pre-built sections" have section and test samples from other document types.

8   Learn about the sections

Click the information button to learn about and preview different sections.
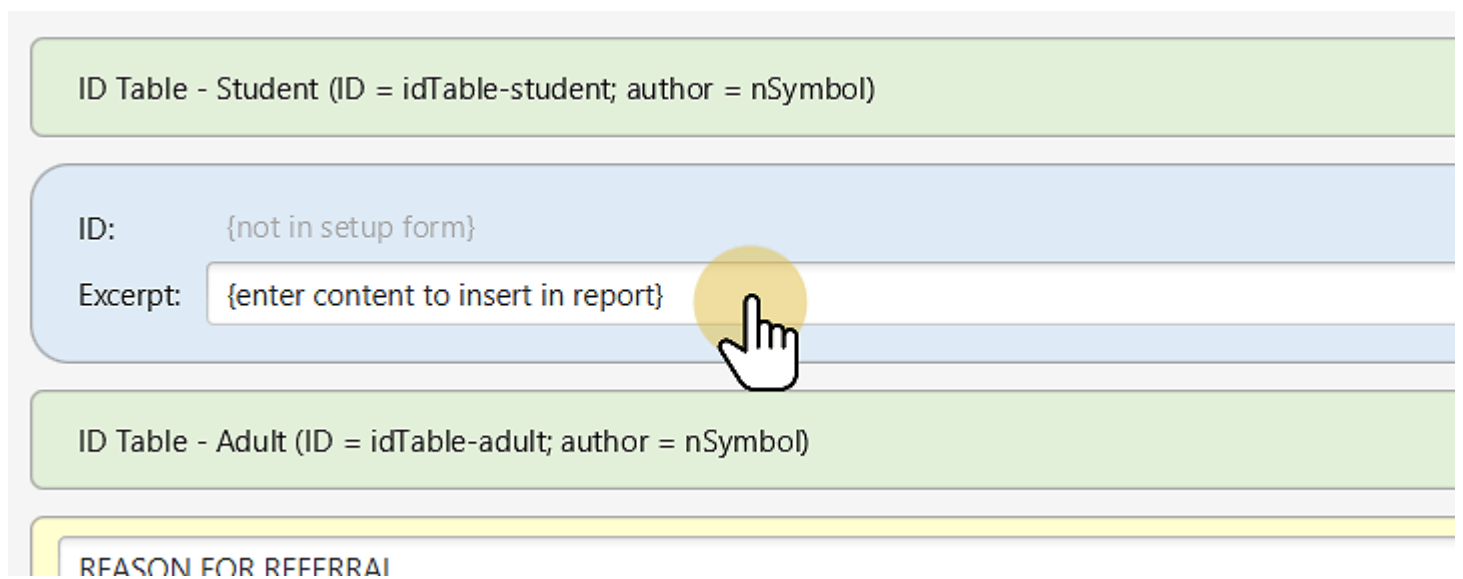
9   Adding a content section

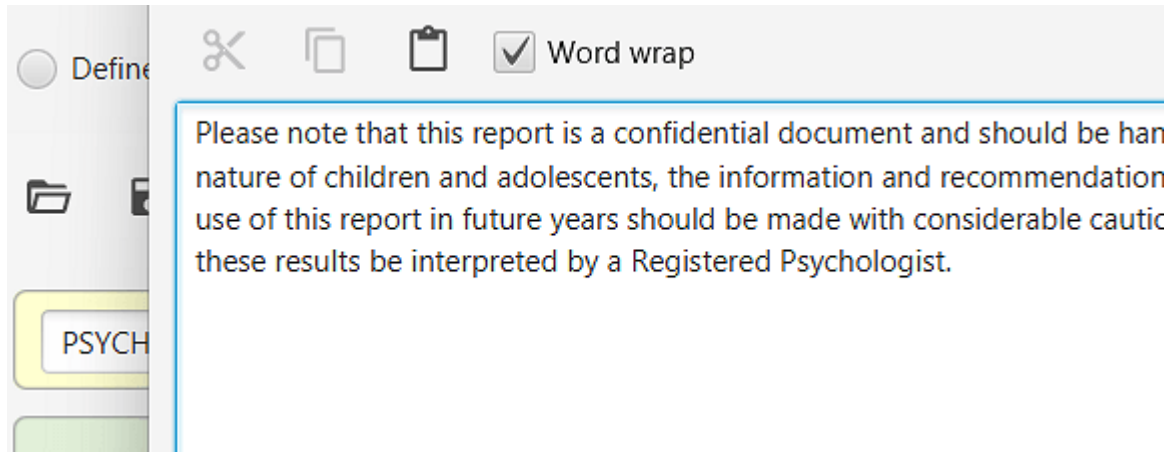Adding a "Content section" will add a new section to your report that has not been previously defined by Tag or your team (team version).

10   Example: Adding a content section

Copy and paste the static content for your new section in the text area. You can then give this content formating and add dynamic logic in the Scribe app.

FYI: The content you enter into a new content section will be dumb

What we mean by "dumb" content is that it is not yet rich text (i.e., no formating) or dynamic (i.e., not pulling in logic). So you can think of this as more of a place holder for the text of the section.

Rest assured you can format and make your content "smart" in the Scribe later on.

11   Make your new content section optional at run-time

Some content sections you will want to have pulled in to the report every single time. THESE SECTIONS DO NOT REQUIRE AN ID, and will be placed in your report every time.

However, if you wish to make the section optional, select "Add to setup form" under settings. It will then become optional, and require an ID.

12   Give your new section a name

Giving your new content section an ID (give it a name) will make it an optional section at runtime.

13   Save this Report builder definition for another time? (optional)

Whew! That was some good work setting up this report definition. Let's not let all that good work go to waste.

> **Tip: Saving a report defintion is optional, but useful**
>
> Perhaps you are the kind of psychologist that works in several different contexts, and you would like to create a similar integrated report for each context... or maybe you want some team members to share your totally awesome integrated report (team version)...
>
> Just click the save button, and then next time, you will find the report definition in the folder next to the save button.
>
> Of course, if you only need one integrated report - feel free to skip this step. Saving your Report builder defintion is optional.

14 It's Magic Time!

When everything is ready to go, click the Magic Wand to build your report.

15   Your integrated report builds itself

The report will build based on your selections.

NAL ASSESSMENT

D = idTable-student; aut

e

ote that this report is a c

= idTable-adult; author =

RAL

(ID = reasonReferral; author = nsymbol)

Building report

38 sections selected

e to the changing and deve

16   It's ready!

It's time to test out your report... so click YES! to jump to your report in the Scribe app.

Report builder is complete

The report has been saved and is ready to use. Do you want to view it now?

[Yes]   [No]

☑ Add shortcut to start screen

> ### Tip: Yes! Check that checkbox!
>
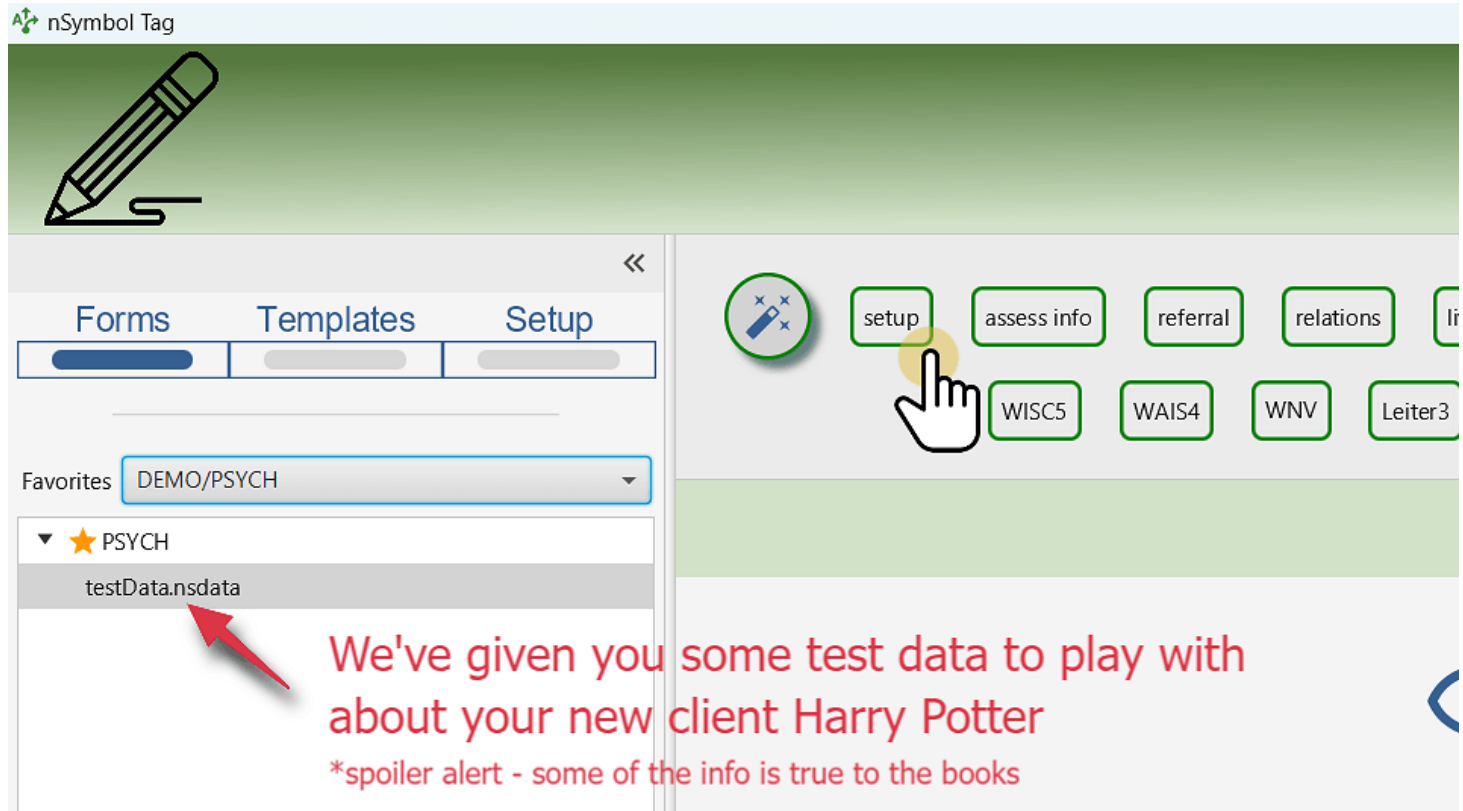> Keep the checkbox checked to add a shortcut to this report on your start screen.
>
> The shortcut will give you the option to create a new client file, edit the templates, export data, and view the associated forms straight from your work area.

17   You have been jumped over to the Scribe app

Time to play with the test data :-) Click the setup tab to see the options you created in the Report builder app.

FYI: A note about the lefthand navigation panel in the Scribe app and nSymbol File Types
nSymbol Tag is a report generation system that relies on several different file types.

The Scribe app has three options in the navigation panel on the left. Each of these options references a different type of work, and a different type of file:

FORMS: This is where you go to create and edit the data files for specific client assessments. The files you create here will end in *.nsdata

TEMPLATES: This is where you go to create and edit your templates. The files you create here will end in *.xsl

SETUP: This is where you go to create, define, and edit data fields for your reports. The files you create here will end in *.rng

18   Select sections according to the client's assessment needs

You won't need every section for every client's report. Select only those sections you need. The tabs across the top will change according to what you select after you click the save button at the bottom.

19   You have access to DSM-5-TR blurbs

Click on the diagnosis tab to gain access to blurbs related to the DSM-5-TR.

Tip: Select diagnoses in order from most to least relevant for your client

The diagnostic blurbs will be organized by category and relevance in the generated report.

Also, we did not pre-populate this section for you because it is just too darn fun to play with :-)

20   Recommendations samples

If you click on the rec tab you will see our recommendations samples, and you can see how they will be inserted in your generated report.

Hey! This is important! These are just our sample recommendations - and they are not meant as a definitive list - and they *may not be appropriate for your client.*

A recommendations bank is a highly personal section dependent on your knowledge and areas of expertise.

We'll show you how to create your own recommendations bank in another guide and video.
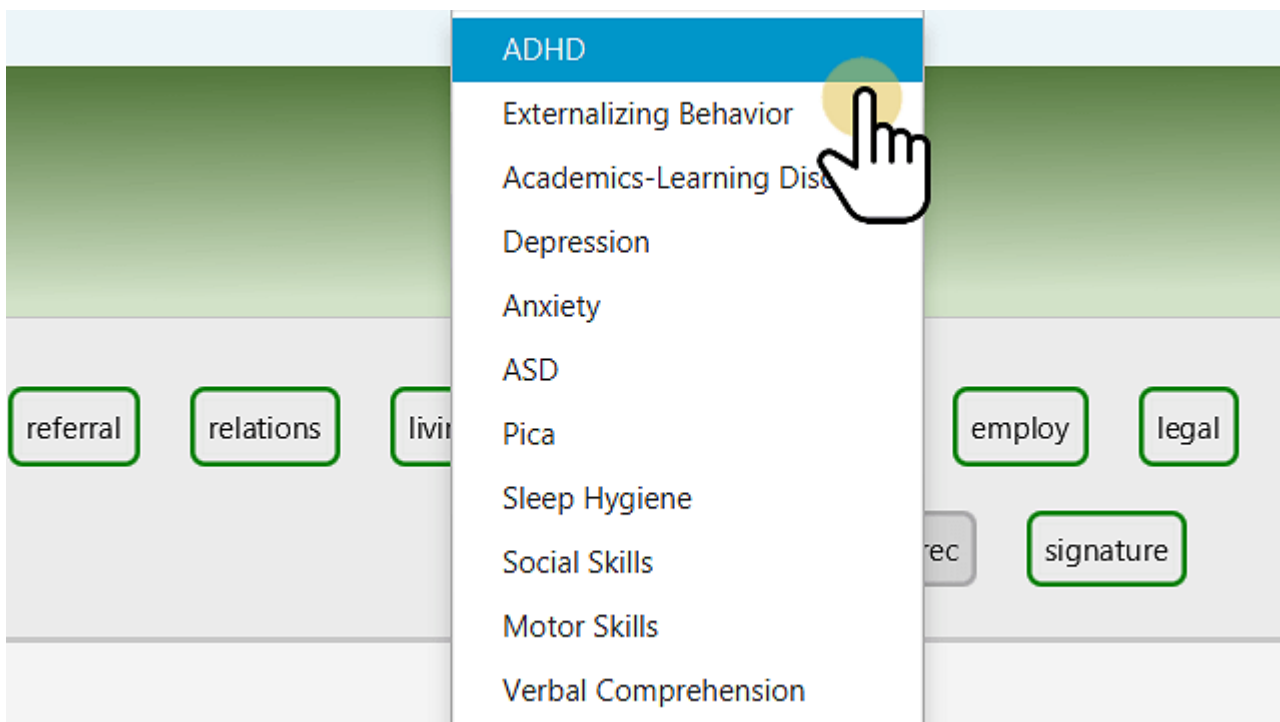
⚠️ **Warning: these recommendations are samples only!**

These recommendations may not be appropriate for your client and are meant as placeholders for your own recommendations bank.

Please feel free to edit this section freely based on your own expertise.

Also, look for our guide on automating your own recommendations bank.

21   Click the Magic Wand!

When all the information in all the tabs is filled out to your liking and you are ready to generate, click the little Magic Wand (next to the tabs), and then the big Magic Wand.

Troubleshoot: have you filled out enough data to generate?

There are a few ways you can tell if you have filled out enough data for the report to generate properly:

1. If there is a tab that is outlined in red, then at least one required field in that section is missing.

2. If there is a tab that is outlined in grey, then there is not enough data to generate that section, even if there are no "required fields." Sometimes the tab will turn green if you change a bit of data and change it back and resave it. The software just needs to know that you have laid eyes on it.

3. If all tabs are green and you click the Magic Wand, you may get an error message popping up at the bottom of your screen that will attempt to tell you where there is missing data. Don't freak out, just go back and fill in more data.

4. Not all data fields are required every time you generate. If you want to know which fields are being called, then go into the tab, and select the three vertical dots for "more options" next to the form title. Here you will find a flag for showing only those fields used in the report.

22 Your report will open in Word or Pages, or whatever opens your *docx files

Your report will now open in any word processor that can open *.docx files and you can edit as you see fit.

PSYCHOEDUCATIONAL ASSESSMENT

| Student Name:	Harry Potter	School:	Hogwarts
Date of Birth:	August 5, 2012	Age:	10 years, 10 months
Grade:	grade five	Student #:	123456
Date Seen:	June 20, 2023	Date of Report:	October 10, 2023
Program:	Wizardry	Psychology Consultant:	Mary Butterworth, R.Psych

REASON FOR REFERRAL

Harry was referred for a psychoeducational assessment to determine his strengths and differences in cognitive, academic and emotional behavioral functioning and to inform academic programming and potential behavioral supports. Harry was referred for assessment by Hogwarts School, who indicated that Harry has been inattentive and impulsive at school. He will often run from class when upset, and he
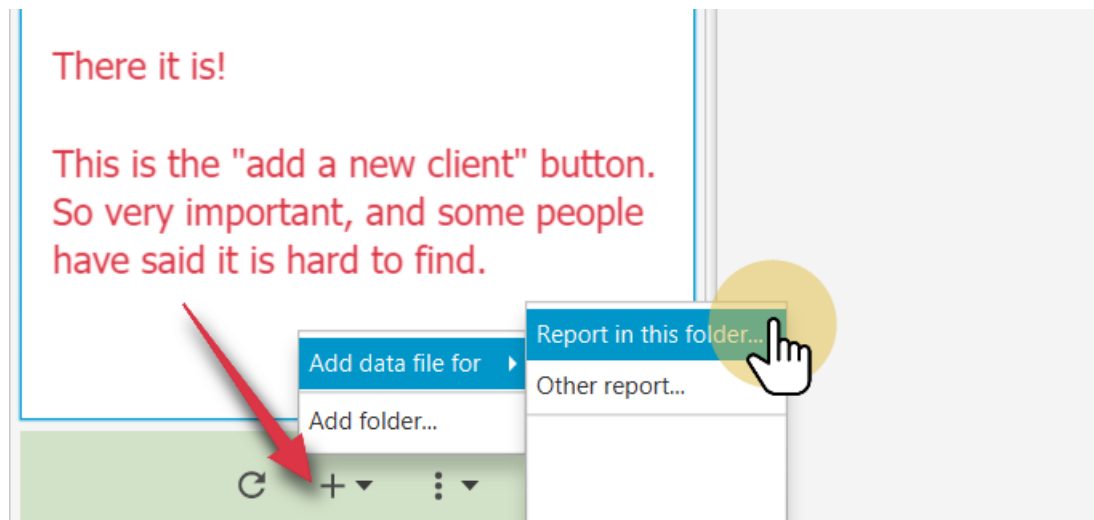
23   Now create your own client file!

Set the Scribe app to "Forms" and make sure you have selected the right folder to save your client file.
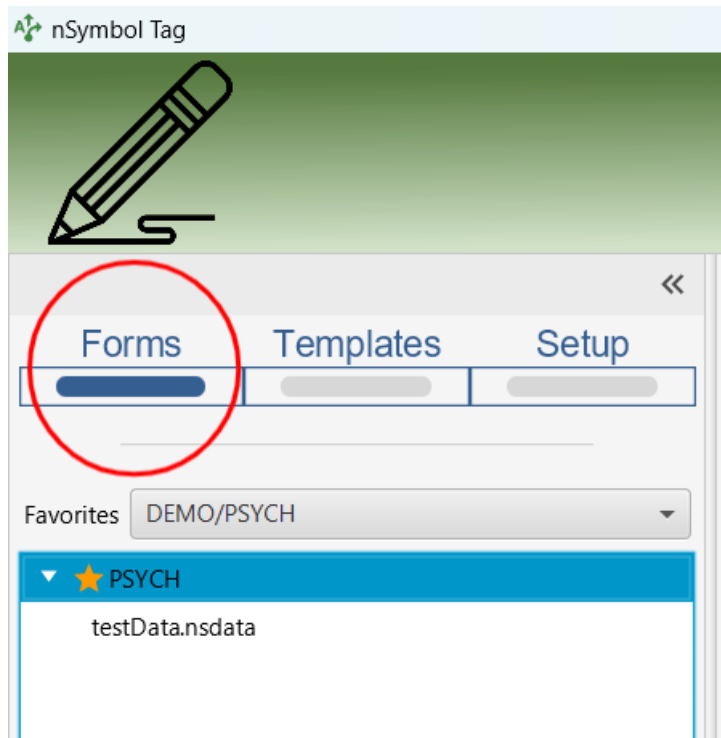
24 Click the "+" button (Look down, look way down!)

Find the "+" at the bottom of the navigation panel. This is where you go to add a client file.

Select "Add data file for" and the "Report in this folder" or "Other report".

ℹ **FYI: Convient little feature**

Reports that you have saved as shortcuts on the start screen will also show up here... this saves you hunting around to find where you stored your integrated report template.

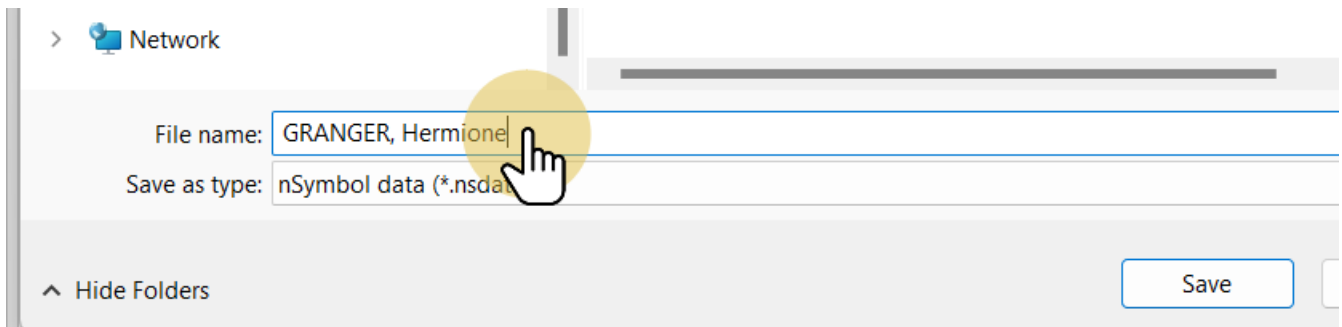## 25   Select the report you want to create a client file for

You can select the integrated report that you built and named in the Report builder app, or you can select one of the various tests or sections and run it independently.
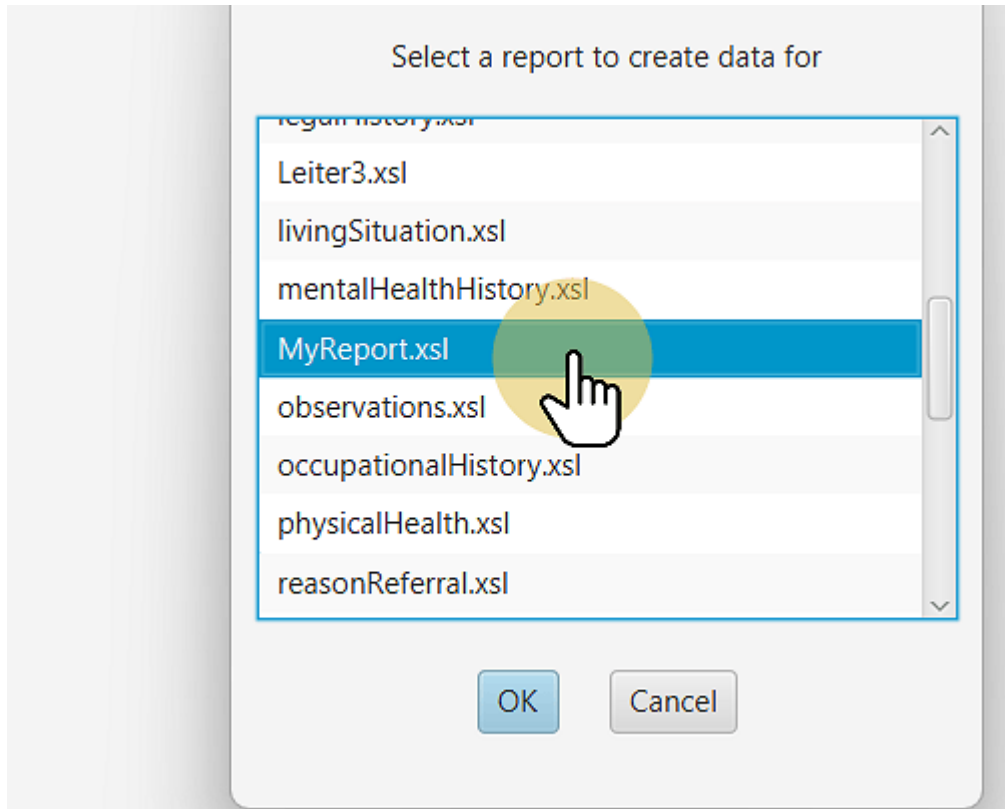
26   Name and save your client file

Name and save your client file wherever you want to save it. Data security is up to you.

FYI: A note about data privacy and security. nSymbol Tag employees never see your data. Ever.

The way that nSymbol Tag is designed does not allow for nSymbol employees to ever see your templates or your client data. We do not store copies of your data and at no point is your data human readable to us.

The mechanism by which the software runs is as follows:

Your client data and your templates are stored wherever you choose, thus making the data security of your stored files up to you.

At run time, the data necessary to run the report is zipped into an encrypted file and sent to an Amazon Web Services server for processing. The processed data is also returned in an encrypted form. At no point is the data human readable (so Amazon employees could never see it either), and the whole process takes split seconds. Data is never stored on the Amazon Web Services server.

Our techies have experience doing security for banks (and auditing bank security systems) and have securely designed major government systems.

So no worries, your data is safe... I mean, at least on our end. If you go around leaving your computer unlocked and sharing your passwords, that's on you - lol. (But also not lol - like just don't do that ...)
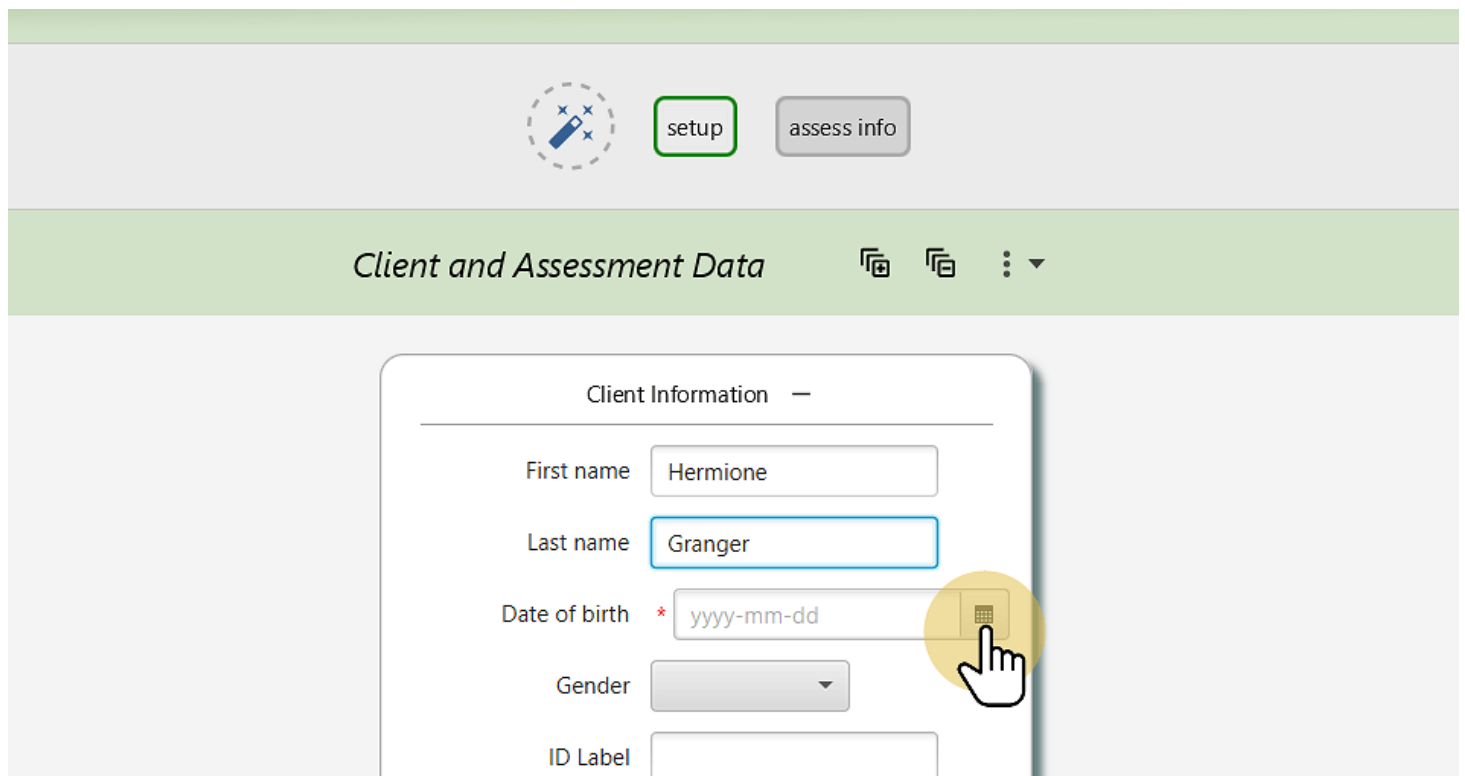
27 Set up your client's report and fill in the data

Go to report setup, and select the sections you want.

Now fill out your data and click the Magic Wand (i.e., repeat steps 18-22 above).

Enter Data. Click Wand. Done.

28   WELL DONE! YOU DID IT!

If you need more help, please reach out to support@nsymbol.com. We are happy to help you get started.

nSymbol Tag

Capture knowledge, automate tasks, and make some big EASY buttons.