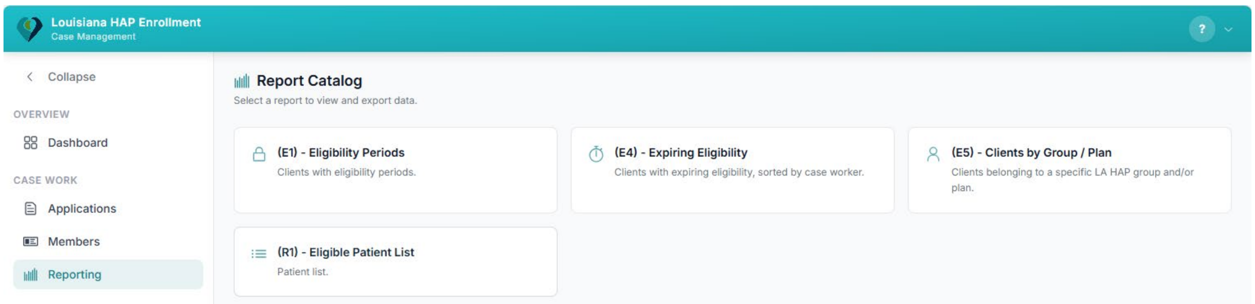
Generating a Report in eFlex

June 2026

Step 1 — Open the Report Catalog

From the navigation menu in the sidebar on the left side of your screen, click **Reports**. The Report Catalog displays all available pre-configured reports.



Available Reports

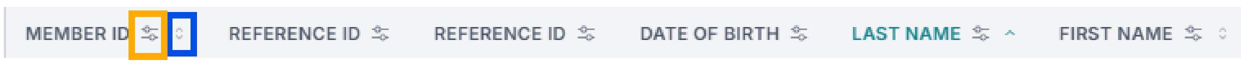
Code	Name	Description
E1	Eligibility Periods	Clients with active eligibility periods
E4	Expiring Eligibility	Clients with expiring eligibility, sorted by case worker
E5	Clients by Group / Plan	Clients belonging to a specific LA HAP group and/or plan
R1	Eligible Patient List	Standard patient list

Step 2 — Select a Report

Click on any report card to open it. The report will load and display a preview of the data in a table along with a count of rows and columns across all pages.

Step 3 — Sort the Data (Optional)

Click any column header to sort the report by that column in ascending order. Click the same header again to reverse the sort to descending order. Not all columns support sorting.



The column headers that have up/down arrows (as indicated in the blue box above) allow for sorting in ascending/descending order.

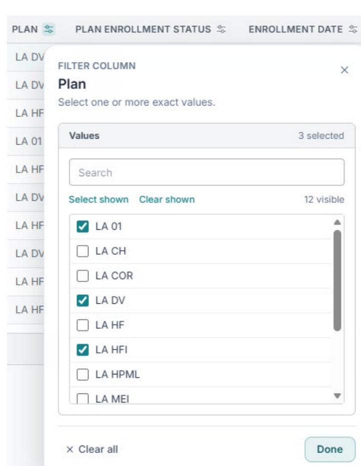
Step 4 — Filter the Data (Optional)

Columns that support filtering display a small filter icon (two horizontal lines) in the column header.

The column headers that have the filter icon (as indicated in the orange box above) allow for filtering of the data.

- **Text / Value Filter** — Click the filter icon on a text column. A popover will appear listing available values. Check or uncheck values to include or exclude them. Use the search box within the popover to quickly find a specific value. Click **Select Shown** to select all visible values at once, or **Clear All** to remove all selections for that column.

- **Example of Value Filter for Field Header - Plan:**



- **Date Range Filter** — Click the filter icon on a date column. A date picker will appear. Select a start date and an end date to restrict results to that range. Click

Clear to remove the date filter.

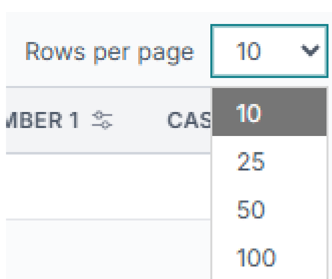
- **Example of Date Filter for Field Header** – Eligibility Start Date:
    - Select the Filter Icon and then select the beginning and end dates for the time period you want the report filtered to.

Active filters are highlighted in blue on the column header. Multiple columns may be filtered simultaneously. Filters take effect immediately and reset the page back to page 1.

Step 5 — Navigate Pages

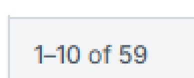
Use the pagination controls at the bottom of the table to move between pages. To change the number of rows displayed per page, use the row count selector on the upper-right of the table and choose between displaying 10, 25, 50, or 100 rows per page.

Selecting the number of rows per page (upper right corner of reported results screen)



Selecting the page of data of reported results:

Lower left corner of reported results:

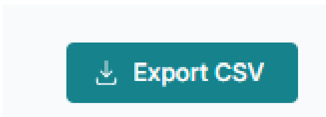


Lower right corner of reported results:

Step 6 — Export to CSV

If your user has export permissions, an **Export CSV** button appears in the upper-right corner of the report page.

1. Apply any filters you want reflected in the export.
2. Click **Export CSV**.



3. A confirmation message will appear indicating the export has been queued.
4. The export runs in the background. When it finishes, you will receive an **email** Containing a link to download the CSV export file.

Note: The CSV export reflects any column filters that are currently active. Page and page size settings do not affect the export — all matching rows are included.

Note: The download link to the report received in your email is only accessible for 24 hours. After expiring, access to view that report via the link is revoked.

Step 7 — Return to the Catalog

Click **Reports** in the “breadcrumb” (Reports / Report Name) at the top of the report page to return to the Report Catalog and select a different report.