UCSF Continuing Education Portal

Credits Report

The Credits Report displays continuing education credits awarded to learners for specific activities over a selected date range. It is used to track, analyze, and export credit data for internal review and external accreditation reporting.

This report is used by CE/CME administrators and accreditation staff to:

- Track the number and type of credits awarded for each activity
- Export credit data for internal reports or accreditation submissions
- Verify that users have received the correct type and quantity of credits
- Audit credit awarding over time by profession, activity format, or department

Accessing the Credits Report

1. Sign in to the CE Portal; scroll to the bottom to select **Administration**.
2. From the main menu, select **Reports**, then **Credits**.

Viewing Data

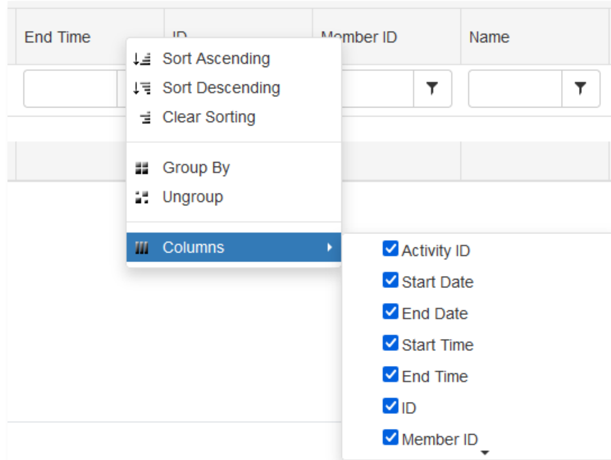
Customize the report display using the following options:

- Select which columns to display
- Rearrange columns as needed
- Apply filters by column to focus on specific records
- Click **Save Layout** to retain your settings

Choose Columns to Display

- Right-click on any column and select the **Data** tab.
- Select or deselect columns to show or hide them.
- Click **Save Layout** to preserve your selections.

Click **Reset** to restore the default column layout.

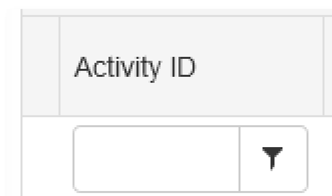


Rearranging Column Order

- Click and drag columns into your preferred order.
- Click **Save Layout** to save the changes.

Filtering Columns

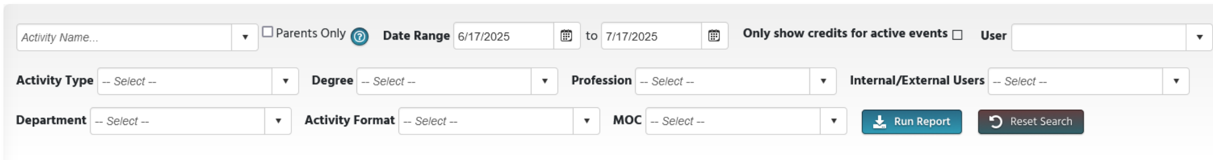
- Use the filter field at the top of any column to search within it.
- Click the funnel icon to set filter conditions (e.g., **Contains**).
- Apply filters to multiple columns to refine the results.



To reset filters:

- Click the funnel icon in a filtered column.
- Select **No Filter** to clear it.

Searching for Credit Data



Use the available filters to narrow the results:

- Activity Name
- Date Range
- Active Event Credits
- User
- Activity Type
- Degree
- Profession
- Internal/External
- Department
- Activity Format
- MOC

To view all activities:

- Leave the **Start Date** and **End Date** fields blank.
- Click the **Run Report** button.

To view data for a specific activity:

- Select the activity from the drop-down menu.
- Enter the desired date range.
- Click the **Run Report** button.

Exporting to Excel

1. Click the **Export to Excel** button.
2. The export will reflect the current column selections and filters.

TIP! Remove filters before exporting if you want to include the full dataset.

If the report exceeds the XLS size limit, the system will export it as a CSV file instead.