Analysis Wizard Guide

by

Clarity Group, Inc.
The Analysis Wizard tool is used to run reports and trend of submitted events as well as access the Patient Snapshot feature. The analysis functions of the Healthcare SafetyZone® Portal allow authorized reviewers to create reports based on any or all of the data fields from the event submission or review and follow-up areas. Analysis reports can be performed for very specific “one-time” purposes or can be designed and saved as convenient, permanent templates. This enables you to create a set of templates for routine use while retaining the ability to create ad hoc reports as needed. The Patient Snapshot feature allows authorized reviewers to search for and generate a report that tracks a person’s experience across their system of care.

Section One: Accessing the Analysis Wizard

The Analysis Wizard can be found by clicking on the “Analysis” button on the left side of the Portal home page.

The Analysis Wizard is a password protected area of the Portal. You will be required to login to use this particular feature.

After logging in you will be taken to the initial screen of the Analysis Wizard.
Section Two: Selecting the Search Criteria

Time Frame

The initial page of the Analysis Wizard tool, titled Time Frame, is where you will begin selecting the criteria for your report. On this page you can:

1. Access saved templates
2. Access Management Reports (Portal Admin and Group Admin)
3. Select the date field you will search by (Submission Date or Event Date)
4. Select a date range
5. Trend by specific days of the week (optional)
6. Trend a specific time frame. (optional)
7. Create/Access Scheduled Reports

When you are done selecting your time frame criteria, click the “Next” button and you will be brought to either the form selection page or to the event type selection page.

Forms (not applicable to all clients)

If your facility or group is utilizing multiple forms to capture events, you will need to select the form you are pulling your results from. Choose the appropriate form from the drop down list and click the “Next” button.
Section Two: Selecting the Search Criteria

Event Type

Here you will select which event and sub event types you wish to include in your report. Displayed will be those event types and sub event types you have been permitted to run reports on.

When an event type is selected, all associated sub types appear to the right of the selected event type and are automatically included in your report. To drill down simply uncheck the sub event types you wish to exclude.

Choosing the ‘Select All’ option above the event type list will automatically select all high level event types and their associated sub event types.

Once you have selected your event types and sub event types click the ‘Next’ button to continue to the location criteria.
Locations

The Locations area functions the same as the Event Type area.

When you have finished selecting your locations, click the “Next” button and you will be taken to your initial result set.

The “Reset Search Criteria” buttons located on the right side of the screen display on most pages in the Analysis Wizard. They can be clicked at any time to reset all search criteria and return to Time Frame area.

The next section of this guide will show you how to refine your result set to get the exact information you are looking for.
Section Three: Using Your Results

Result Set

Your initial result set is a return of the most essential information. You are provided with the number of events that meet your criteria, how many events you would like to display on the page, the date and time these events were submitted, and the event numbers.

If you have access the review and follow-up area of an event, you can be brought to this area by clicking on the event number. Doing so will open that event’s review/follow-up area in a new window. From there you can perform investigative follow-up and edit the event’s information. If you do not have access to the event, a new window will appear with a message stating you are not authorized to view the event.

You may print your result set at any time by clicking the “Print Results” button located at the bottom of the grid.
Sorting

You may perform a single sort in your result set by clicking on a column header. To do a multi-level sort click the “Sorting” button on the left navigation panel. This area provides you with up to three levels of sorting for your results list. You may also choose to sort in ascending or descending order by clicking on the appropriate radio button to the right of each sort field. To complete the sort and return to your result set, click the “Refresh Result Set” button.
Columns

To incorporate additional questions into your report, click the “Columns” button from the left navigation menu. All available questions are shown in the “Available Columns” list on the left. To add a columns click on the analysis name of the column. Once highlighted, click the “Add” button in the center of the page and it will move from your Available Columns list to your Selected Columns list. You may search for columns by their listed name on the form by using the “Search question” feature. You may also hold your mouse over an analysis name to view the column’s name as it appears in the form (see below).

You may add multiple columns at one time by holding the “CTRL” button on your keyboard (bottom left) and then using your mouse to select the columns that you would like to add.

To remove columns you are no longer using, highlight the appropriate column(s) and click “Remove”. You may also arrange your columns by using the “Move Up” and “Move Down” buttons.

When you are finished in this area, click the “Refresh Result Set” button to see your results.
Filter

To apply filters to your added columns, click the “Filter” button from the left navigation menu.

In the Available Columns list you will find those columns you have added to your report. Select appropriate column and check the answers choices from the “Values” area you would like to filter. You may select as many or as few answer choices as you would like, and you may filter on multiple columns.

You may also apply filters to columns representing a text box question. When you select one of these columns, a blank text box will appear in the “Values” area. Here, you can type in any word or phrase that may be commonly used as an answer to that question.

When you have finished applying your filters, click the “Refresh Result Set” button to see your new results. At any time you may clear the filters that have been applied by clicking the “Clear Filters” button.
Graphing

The graphing area of the Analysis Wizard allows you to create visual representations of your data. To enter the graphing area, click the “Graphing” button located on the left navigation menu. You will be taken to a new page with a list of fields to help you build your graph.

1. **Data Field** – Select the column you would like to graph from. The column must be included in your current result set.
2. **Chart Type** – Choose how you would like the data to display. Your chart options are a Line, Bar, Stacked Bar, Column, Stacked Column, Stacked Area, or Pie.
3. **Period** – Determine a time period for your graph. Your options are All, Day, Week, Month, Quarter (Fiscal or Calendar), and Year.
4. **Data Field 2** – Select a second column to graph from. Applies only to Stacked Bar, Stacked Column, and Stacked Area chart types.
5. **Chart Title** – Defaults to “Event Summary”. This field can be customized.
6. **Comments** – Not required. Text will display below the chart title.

When you are finished filling out the above fields, click the “Graph” button.
Graphing Continued

Your graph will open in a new window along with a summary grid. Below is a snapshot of a standard graph produced in the Analysis Wizard and the criteria used to create it.

The graph page below also contains some functionality of its own. You can drill down to a specific data set by clicking one of the data points in the graph. This will bring you to a new page containing hyperlinked event numbers associated with that data point in a format that matches your result set.

To print your graph simply print the web page. You can also hide the summary grid by checking “Hide the Grid”.

To incorporate this graph in another program such as Microsoft® Word or PowerPoint, right click on the graph with your mouse and select “Save Picture As...”. Once the graph is saved as an image the file can be inserted into the appropriate program.

To export your summary grid to Microsoft® Excel, use the “Export to Excel” button.
Export to Excel

Export your current result set to Microsoft® Excel at any time by clicking the “Export Excel” button in the left navigation menu. You may open your result set directly in Excel by clicking “Open” or you can save your results as a file on your hard drive by clicking “Save”. Exporting results to Excel allows you to manipulate event data and make use of all the functionality Excel has to offer.

Saving a Template

If you create a report that will be run more than once, you can save that report as a template by clicking the “Save Template” button. Give your template a name, provide any comments you want to add, your name should appear in the user dropdown list. If you are going to incorporate the template into you’re a dashboard select the “Yes” radio button and click the “Save” button. You can view your saved templates by clicking the “Saved Template” button in the top left area of the Analysis Wizard.
Saving a Template Continued

To run a saved template click the name of the template, or you can view the details of a template without running a report by clicking the “Details” button. If you are no longer using a template and would like to remove it from your list, click the “Delete” button.

<table>
<thead>
<tr>
<th>Form</th>
<th>Last Date Report Tag</th>
<th>Name</th>
<th>Comments</th>
<th>Created</th>
<th>Last Updated</th>
<th>Last Updated By</th>
<th>View Details</th>
<th>Assign Template</th>
<th>Delete</th>
<th>Dashboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>Test Report (Steps)</td>
<td></td>
<td></td>
<td></td>
<td>11/01/14</td>
<td>dirty</td>
<td>Dennis</td>
<td>Assign To</td>
<td>Delete</td>
<td>No</td>
</tr>
<tr>
<td>Patient</td>
<td>Test Template</td>
<td></td>
<td></td>
<td></td>
<td>10/28/14</td>
<td>dirty</td>
<td>Details</td>
<td>Assign To</td>
<td>Delete</td>
<td>No</td>
</tr>
<tr>
<td>Patient</td>
<td>10/17/14 15:21</td>
<td>Title Test</td>
<td></td>
<td></td>
<td>10/07/14</td>
<td>dirty</td>
<td>Details</td>
<td>Assign To</td>
<td>Delete</td>
<td>No</td>
</tr>
</tbody>
</table>

Clicking the template name brings you to the Time Frame area of the Analysis Wizard where you determine your date range. Enter your new date range and click the “Finish” button. This will take you directly to your result set.
Scheduled Reports
Scheduled Reports can be created while in the Analysis Wizard. You would select the criteria for the report (Time Frame, Form, Event type, Locations) the same as you would if you were running a regular analysis or creating a template. The difference with the scheduled report is that it allows you to set a “start date” (when the report will start sending out) “time period” (how frequent the report will send out) and select the user(s) that you would like the report to be electronically sent to.

How to Manage a Scheduled Report:
A button will be available for selection on the top part of the Analysis Wizard page. This button will take the user to their scheduled reports.

View of reports for a user that has ability to “schedule” reports.

<table>
<thead>
<tr>
<th>Form</th>
<th>Name</th>
<th>Comments</th>
<th>Time Period</th>
<th>View Details</th>
<th>Assign Form</th>
<th>Assign To</th>
<th>Report Created</th>
<th>Report Last Updated</th>
<th>Last Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run</td>
<td>Patient falls</td>
<td>Falls</td>
<td>Monthly</td>
<td>Details</td>
<td>Clarity Group</td>
<td>Clarity Group</td>
<td>02/25/15</td>
<td>02/25/15</td>
<td>clancy</td>
</tr>
<tr>
<td>Run</td>
<td>Patient falls</td>
<td>Falls</td>
<td>Monthly</td>
<td>Details</td>
<td>Clarity Group</td>
<td>Clarity Group</td>
<td>12/09/14</td>
<td>12/09/14</td>
<td>clancy</td>
</tr>
<tr>
<td>Run</td>
<td>Patient falls</td>
<td>Falls</td>
<td>Monthly</td>
<td>Details</td>
<td>Clarity Group</td>
<td>Clarity Group</td>
<td>12/09/14</td>
<td>12/09/14</td>
<td>clancy</td>
</tr>
<tr>
<td>Run</td>
<td>Patient falls</td>
<td>Falls</td>
<td>Monthly</td>
<td>Details</td>
<td>Clarity Group</td>
<td>Clarity Group</td>
<td>12/09/14</td>
<td>12/09/14</td>
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</tr>
<tr>
<td>Run</td>
<td>Patient falls</td>
<td>Falls</td>
<td>Monthly</td>
<td>Details</td>
<td>Clarity Group</td>
<td>Clarity Group</td>
<td>12/09/14</td>
<td>12/09/14</td>
<td>clancy</td>
</tr>
</tbody>
</table>

View of reports for a user that has the ability to “schedule” and “manage” reports.

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Scheduled Reports continued
If the “Modify button is clicked, the user has the ability to manipulate the criteria for a report that is already scheduled. Those changes will effect the way the report displays and/or is received for everyone scheduled. The user will also have the ability to add people to the report or delete the report for users individually.

View if “Modify” button is clicked.

View if “Manage Scheduled Reports” button is clicked.
In this area of the report, a user is able to delete the report completely as opposed to on an individual user basis.

Receiving the scheduled report via Email:
The report is sent out electronically early morning on the date you set the report to run/re-run. The email will contain the name of the report, any description that has been given, and a link that will allow the user to view the report.
Viewing the report: Once the user clicks the “View Report” link they will be taken to the login page where they must enter their Username and Password. Upon logging in the report will display.

Exit Report button: Clicking this button will close the report.

Time Frame button: Clicking this button will allow the user to adjust the date range and possibly produce a larger or smaller number of records. It will only apply to the report they are currently within. It will not affect the date range settings for the actual scheduled report.

Export to Excel button: Clicking this button allows the results to be saved within an Excel spreadsheet.

Print Results button: Clicking this button allows you to print the result set tab.

Previous button: This button is applicable for the tabs on the left side of the screen. (i.e., If you are on the Result Set tab and you click Previous, it will to the Time Frame tab.)
Section Four: Patient Snapshot

Reviewers are given the ability to access the Patient Snapshot feature by their administrator(s). If you have been given the ability to access Patient Snapshot a link to the tool will appear in the Analysis Wizard to the right of the Saved Template link.

Search fields in the Patient Snapshot includes date ranges for submitted date as well as event date. Up to four additional search fields are set-up by the administrator. Users may search using multiple fields the option of requiring an exact match to their entry. The example below shows a search by medical record number only. All columns displayed in the result set are sortable by clicking the column header. Results can also be exported to Excel for additional analysis by using the “Export to Excel” button.

Patient Snapshot

Date Option: Submitted Date & Event Date
Start Date: 01/03/2013
End Date: 01/03/2013
Medical Record Number: 200096
Last Name: Simpson

Results can also be exported to Excel for additional analysis by using the “Export to Excel” button.
If you have any questions regarding the Healthcare SafetyZone® Portal and its reviewing capabilities, please don’t hesitate to contact the Clarity Help Desk at 773.864.8298 or email support@claritygrp.com

www.claritygrp.com