



Ambulatory Operations Application Guide

Measure Factory

Ambulatory Operations Application Guide: Measure Factory

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About This Guide

What is Ambulatory Operations?

Ambulatory Operations is a healthcare application, developed by Dimensional Insight. Built with Measure Factory—Dimensional Insight's business rules engine—Ambulatory Operations standardizes your source system data across relevant metrics. The result is consistent, trustworthy numbers that empower your organization to make data-driven decisions.

What insights does Ambulatory Operations provide? Ambulatory Operations provides visibility into interactions between providers and patients. It shows activity from a variety of settings, such as physician offices, hospitals, and nursing homes.

Ambulatory Operations provides measures that reflect:

- Volumes, such as office visits, appointments, and procedures
- Revenue and finances, such as charges and accounts receivable
- Productivity, such as RVUs (relative value units) and charge lag
- Population characteristics, such as population segment sizes and visits per person year

Where does the data come from? Data is extracted from two types of systems:

- Ambulatory and physician electronic health records (EHR) systems
- Revenue cycle systems

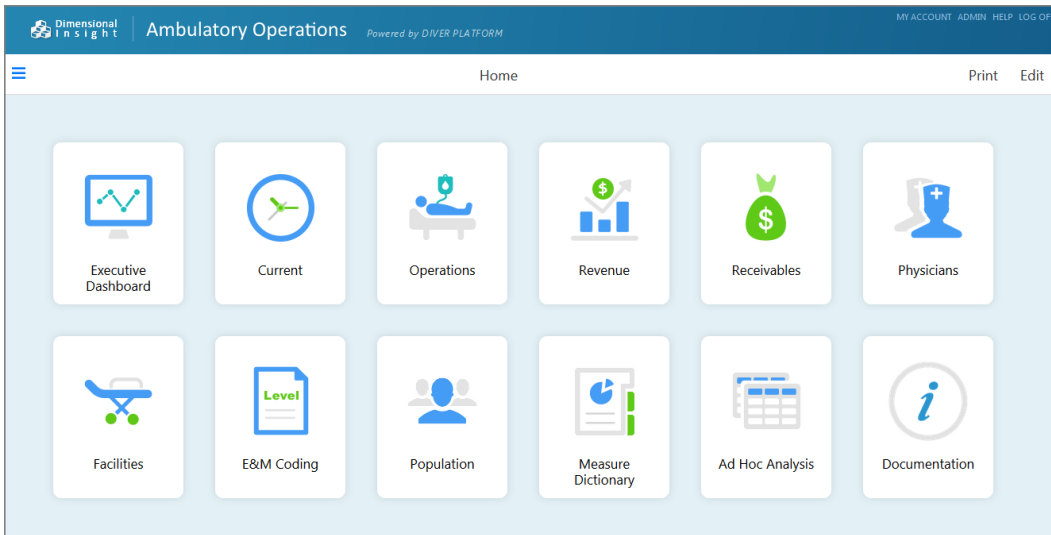
Ambulatory Operations uses transactional data—for example, appointments—as well as information about professional claims.

Are other Applications available? Yes. Ambulatory Operations is only one of Dimensional Insight's solutions for healthcare. Others include Hospital Operations, Surgery, and Provider Performance Advisor.

What is in this guide?

This guide explains how to work with the Ambulatory Operations dashboards. It teaches you how to access, read, and dive into your data.

NOTE: Your Dimensional Insight consultant and developers within your organization can modify these dashboards to better suit your needs, so keep in mind that your view might differ from what is shown here.



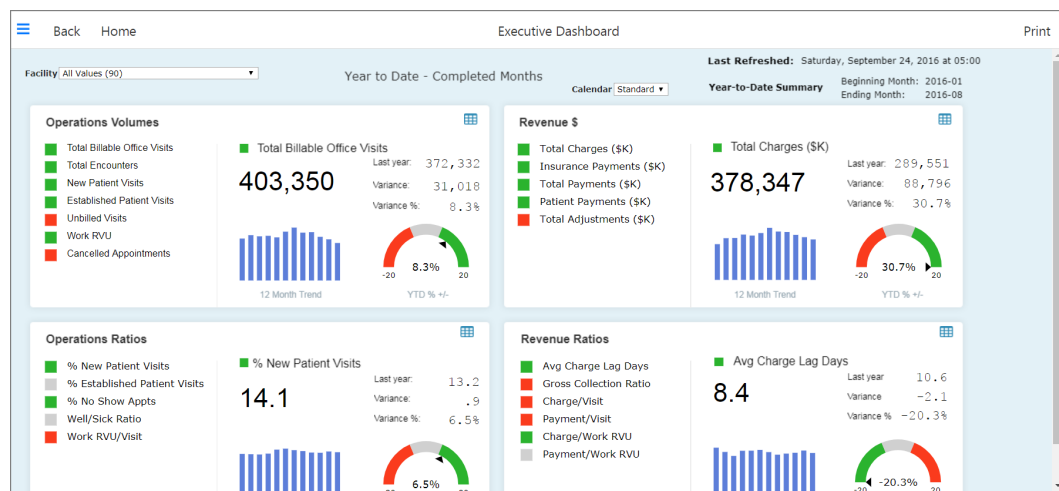
The Ambulatory Operations Dashboards

The following dashboards are included with Ambulatory Operations:

Executive Dashboard

Use the **Executive Dashboard** to view current and trended data about patient visits, work relative value units (RVUs), charges, and payments.

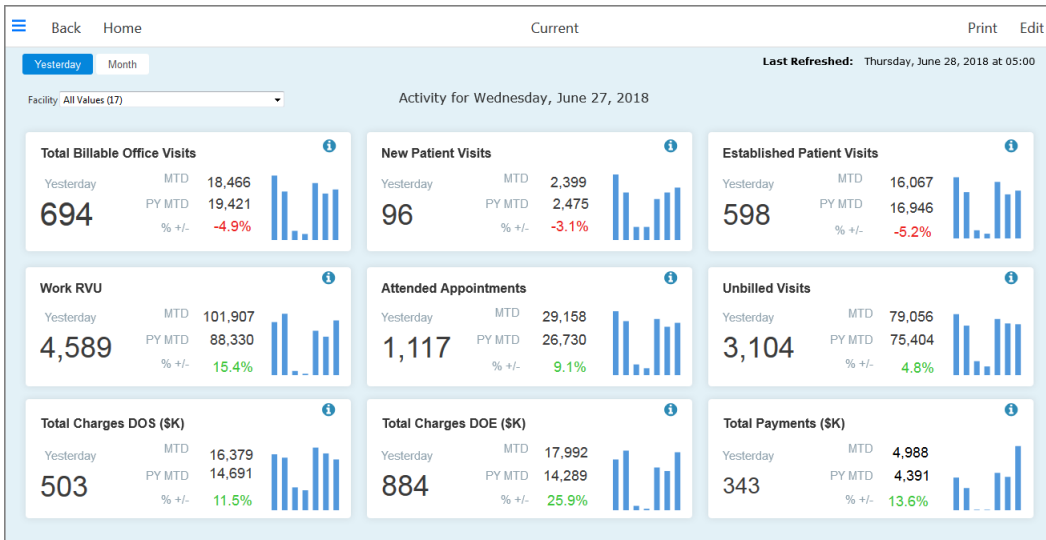
For more information, see [Executive Dashboard on page 9](#).



Current

Use the **Current** page to view current and past data about patient visits, work RVU, and billing.

For more information, see [Current on page 13](#).



Operations

Use the **Operations** page to view current and trended data about patient visits and RVU.

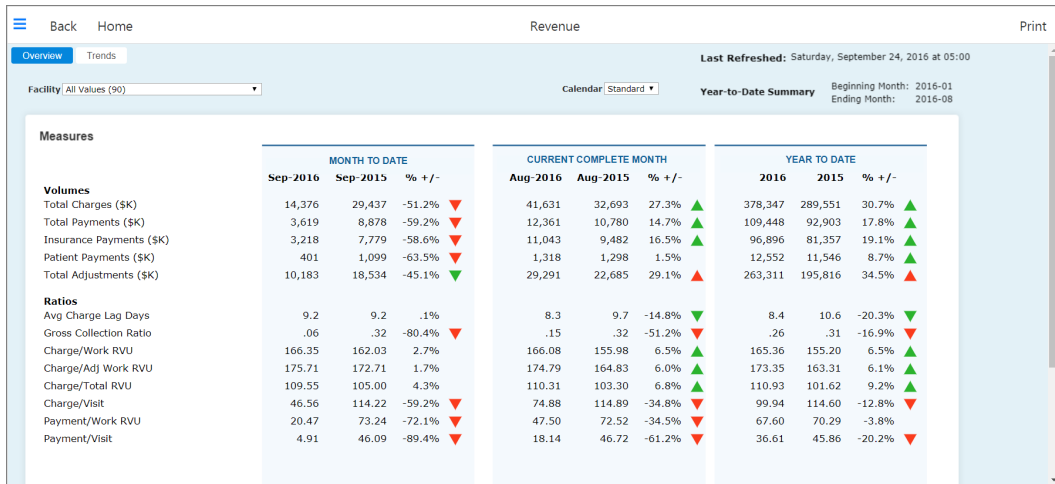
For more information, see [Operations on page 17](#).

Measures	MONTH TO DATE			CURRENT COMPLETE MONTH			YEAR TO DATE		
	Sep-2016	Sep-2015	% +/-	Aug-2016	Aug-2015	% +/-	2016	2015	% +/-
Volumes									
Total Encounters	178,087	318,978	-44.2%	466,372	399,244	16.8%	3,771,705	3,223,038	17.0%
Total Billable Office Visits	12,601	35,764	-64.8%	41,620	43,776	-4.9%	403,350	372,332	8.3%
New Patient Visits	1,704	4,755	-64.2%	5,704	5,785	-1.4%	56,701	49,154	15.4%
Established Patient Visits	10,897	31,009	-64.9%	35,916	37,991	-5.5%	346,649	323,178	7.3%
Consultation Visits	706	2,129	-66.8%	2,332	2,588	-9.9%	22,081	20,205	9.3%
Hospital Visits	5,054	12,321	-59.0%	17,461	15,370	13.6%	186,633	125,748	48.4%
Nursing Home Visits	33	383	-91.4%	200	565	-64.6%	3,400	4,167	-18.4%
Transitional Care Visits	32	132	-75.8%	174	184	-5.4%	2,137	1,734	23.2%
Home Services Visits	18	90	-80.0%	79	92	-14.1%	870	889	-2.1%
Well Visits	1,134	3,113	-63.6%	4,076	4,275	-4.7%	30,785	29,509	4.3%
Sick Visits	10,830	30,803	-64.8%	35,542	37,265	-4.6%	353,312	324,830	8.8%
Professional Visits	24,519	63,074	-61.1%	83,067	76,564	8.5%	840,220	644,718	30.3%
Total Visit Encounters	91,240	109,932	-17.0%	195,959	131,427	49.1%	1,394,842	1,102,003	26.6%
Total RVU									
Total RVU	131,229	280,353	-53.2%	377,402	316,496	19.2%	3,410,546	2,849,209	19.7%
Work RVU	86,416	181,677	-52.4%	250,674	209,594	19.6%	2,288,012	1,865,694	22.6%
Adj Work RVU	81,816	170,439	-52.0%	238,171	198,347	20.1%	2,182,582	1,773,009	23.1%

Revenue

Use the **Revenue** page to view current and trended data about charges, payments, and adjustments.

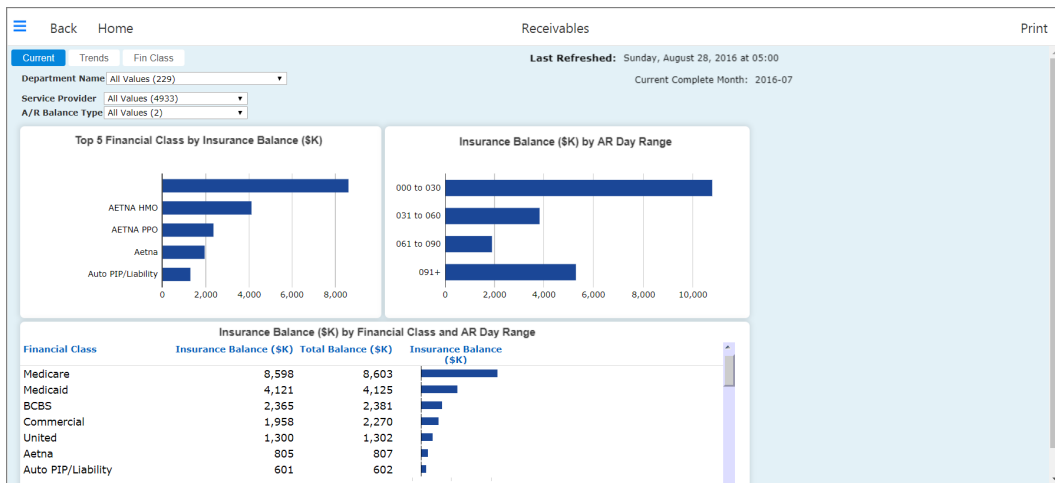
For more information, see [Revenue on page 23](#).



Receivables

Use the **Receivables** page to view current and trended data about the balances in accounts receivable.

For more information, see [Receivables on page 29](#).



Physicians

Use the **Physicians** page to view current and trended data about encounter service provider volume, work RVU, and billing.

For more information, see [Physicians on page 33](#).

Encounter Service Provider	TOTAL BILLABLE OFFICE VISITS			NEW PATIENT VISITS			ESTABLISHED PATIENT VISITS		
	Cur	Prev	% +/-	Cur	Prev	% +/-	Cur	Prev	% +/-
Zimmerman, V (PHY_004742)	1,525	77	1,880.5%	175	20	775.0%	1,350	57	2,268.4%
Zimmerman, Q (PHY_001105)	1,219	2,332	-47.7%	389	665	-41.5%	830	1,667	-50.2%
York, H (PHY_019575)	218	19	1,047.4%	18	1	1,700.0%	200	18	1,011.1%
Yates, R (PHY_024553)	455	543	-16.2%	9	15	-40.0%	446	528	-15.5%
Wynn, Y (PHY_024661)	96	54	77.8%	0	3	-100.0%	96	51	88.2%
Wynn, U (PHY_002569)		1	-100.0%		1	-100.0%		0	
Wyatt, K (PHY_002911)	190	315	-39.7%	67	89	-24.7%	123	226	-45.6%
Wyatt, J (PHY_004131)	2,975	2,519	18.1%	1,021	849	20.3%	1,954	1,670	17.0%
Wright, I (PHY_004324)	2,108	1,714	23.0%	333	261	27.6%	1,775	1,453	22.2%
Wright, D (PHY_003128)	593	548	8.2%	61	57	7.0%	532	491	8.4%
Wooten, A (PHY_024654)	2,035	1,741	16.9%	571	563	1.4%	1,464	1,178	24.3%
Woodward, O (PHY_020085)	6			0			6		
Wong, J (PHY_026452)	820			17			803		
Wolfe, V (PHY_002762)	1	0		0	0		1	0	
Wolfe, K (PHY_017736)	0	1	-100.0%	0	0		0	1	-100.0%
Wilson, Y (PHY_016113)	0	1	-100.0%	0	0		0	1	-100.0%
Williamson, O (PHY_005161)	1	7	-85.7%	0	0		1	7	-85.7%
Williamson, B (PHY_023120)	865	600	44.2%	205	143	43.4%	660	457	44.4%
Williams, T (PHY_005292)	0	1	-100.0%	0	1	-100.0%	0	0	
Williams, A (PHY_045012)	110	4	2,650.0%	18	3	500.0%	92	1	9,100.0%

Facilities

Use the **Facilities** page to view current and trended data about department volume, work RVU, and billing.

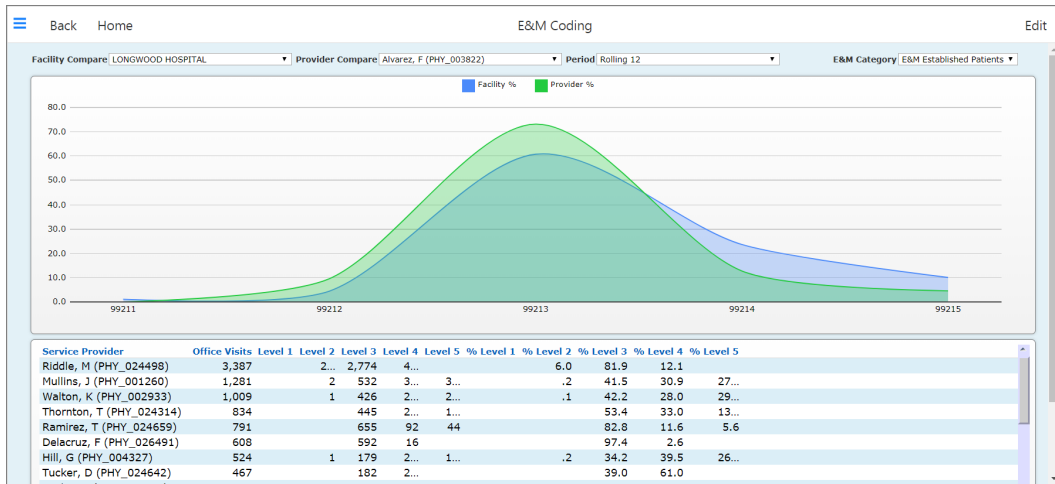
For more information, see [Facilities on page 39](#).

Facility	TOTAL BILLABLE OFFICE VISITS			NEW PATIENT VISITS			ESTABLISHED PATIENT VISITS		
	Cur	Prev	% +/-	Cur	Prev	% +/-	Cur	Prev	% +/-
ENG SKAGEN	7,409	8,471	-12.5%	1,069	1,143	-6.5%	6,340	7,328	-13.5%
FAIRFAX COMMUNITY HEALTH CENTER	14,997	12,383	21.1%	1,787	1,499	19.2%	13,210	10,884	21.4%
GPL CARDIOLOGY @ GEORGETOWN	8,108	7,329	10.6%	777	767	1.3%	7,331	6,562	11.7%
GPL CARDIOLOGY @ METRO	4,801	4,959	-3.2%	613	565	8.5%	4,188	4,394	-4.7%
GPL GEORGETOWN	18,217	18,512	-1.6%	845	1,275	-33.7%	17,372	17,237	.8%
GPL ROBIN CT B	9,166	9,537	-3.9%	830	782	6.1%	8,336	8,755	-4.8%
GPL Robin CT A	1,905	2,064	-7.7%	368	378	-2.6%	1,537	1,686	-8.8%
GPL SPRINGFIELD ACRES A	7,707	8,587	-10.2%	215	233	-7.7%	7,492	8,354	-10.3%
GPL WEST CAPE	9,472	10,575	-10.4%	485	807	-39.9%	8,987	9,768	-8.0%
LCD OPEN FIELD	22,474	21,204	6.0%	6,600	6,458	2.2%	15,874	14,746	7.6%
LONGWOOD HOSPITAL	8,878	8,388	5.8%	948	746	27.1%	7,930	7,642	3.8%
MAPLEWOOD HOSPITAL	13,789	10,694	28.9%	2,275	1,493	52.4%	11,514	9,201	25.1%
MED PLAZA ONE	5,470	4,626	18.2%	709	459	54.5%	4,761	4,167	14.3%
OPEN FIELD A	13,316	13,597	-2.1%	390	387	.8%	12,926	13,210	-2.1%
OUT PATIENT GEORGETOWN	5,535	5,008	10.5%	574	465	23.4%	4,961	4,543	9.2%
PAGE FIELD B	6,912	7,106	-2.7%	1,719	1,720	-.1%	5,193	5,386	-3.6%
PINE ISLAND ROAD	38,600	35,729	8.0%	8,199	7,093	15.6%	30,401	28,636	6.2%
PLANTATION WOUND CARE	5,569	3,968	40.3%	647	455	42.2%	4,922	3,513	40.1%
RIVERWAY AMBULATORY	4,552	5,854	-22.2%	910	1,009	-9.8%	3,642	4,845	-24.8%
SANCTUARY OP	29,845	25,939	15.1%	4,219	2,595	62.6%	25,626	23,344	9.8%
SH	2,674	1,383	93.3%	1,256	634	98.1%	1,418	749	89.3%
SOUTH POINT	14,719	17,622	-16.5%	703	983	-28.5%	14,016	16,639	-15.8%
SPRINGFIELD HOSPITAL	18,105	14,712	23.1%	2,726	2,476	10.1%	15,379	12,236	25.7%

E&M Coding

Use the **E&M Coding** page to view data about the distribution of a provider's evaluation and management visits, compared to their facility.

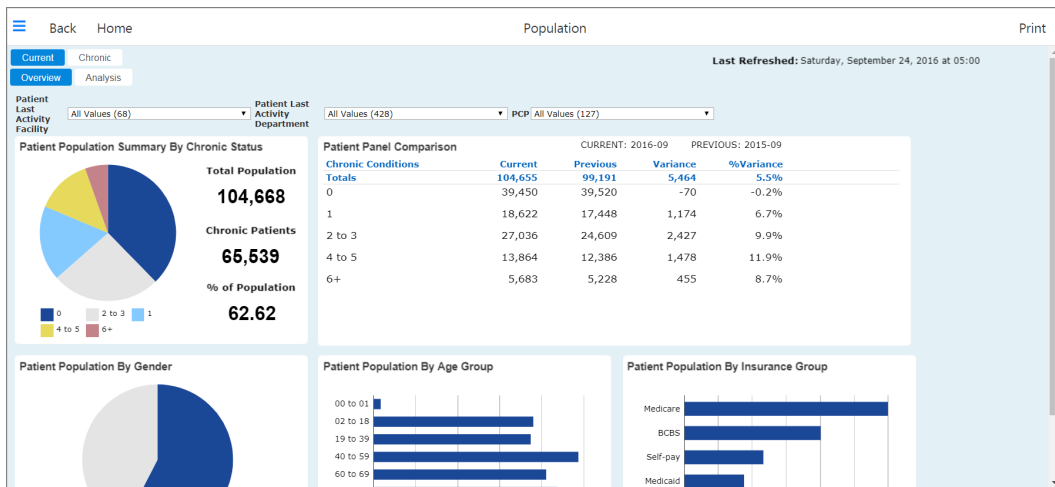
For more information, see [E&M Coding on page 45](#).



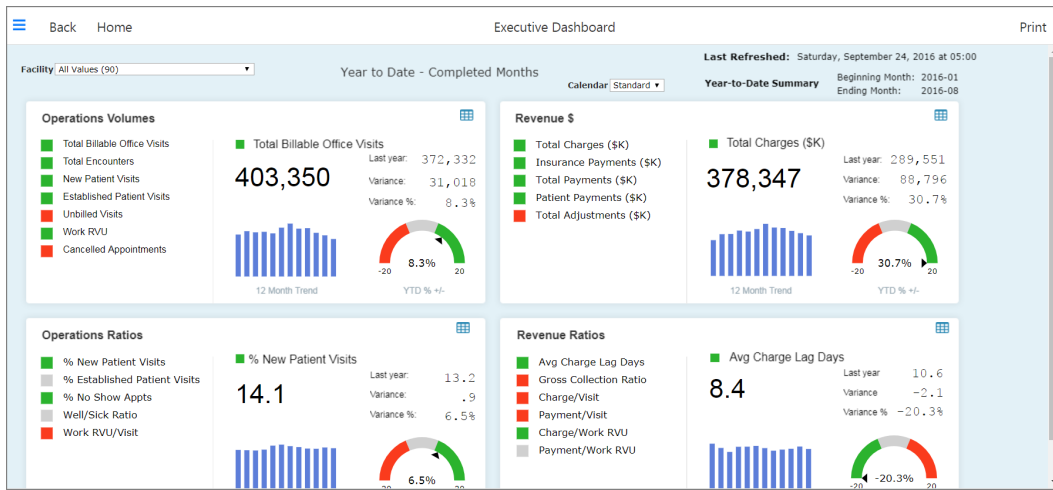
Population

Use the **Population** page to view data about the current patient population, and access details about chronic patients over time.

For more information, see [Population on page 47](#).



Executive Dashboard



Go to the dashboard and adjust your view

1. On the home page, click **Executive Dashboard**.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
4. In the **Calendar** pull-down menu, choose one of the following:
 - **Standard**, if you want to view data beginning with January of the current year
 - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

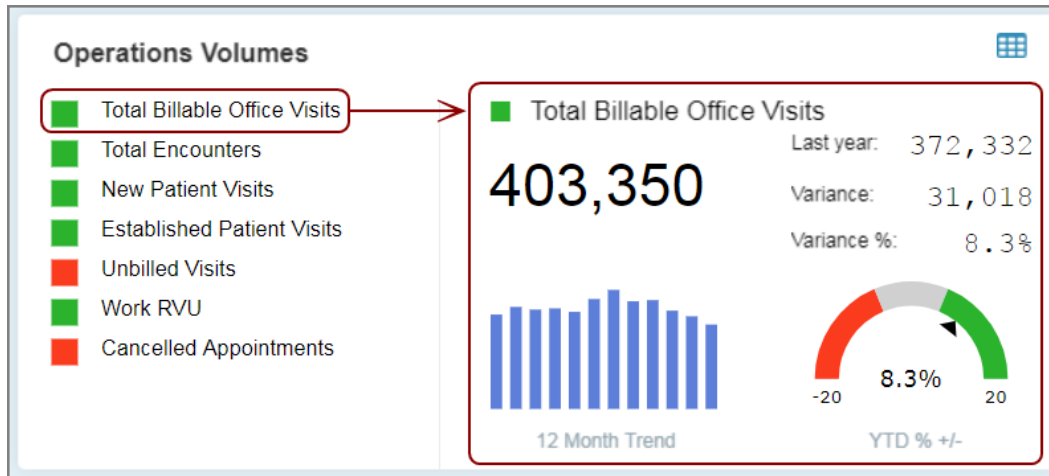
On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

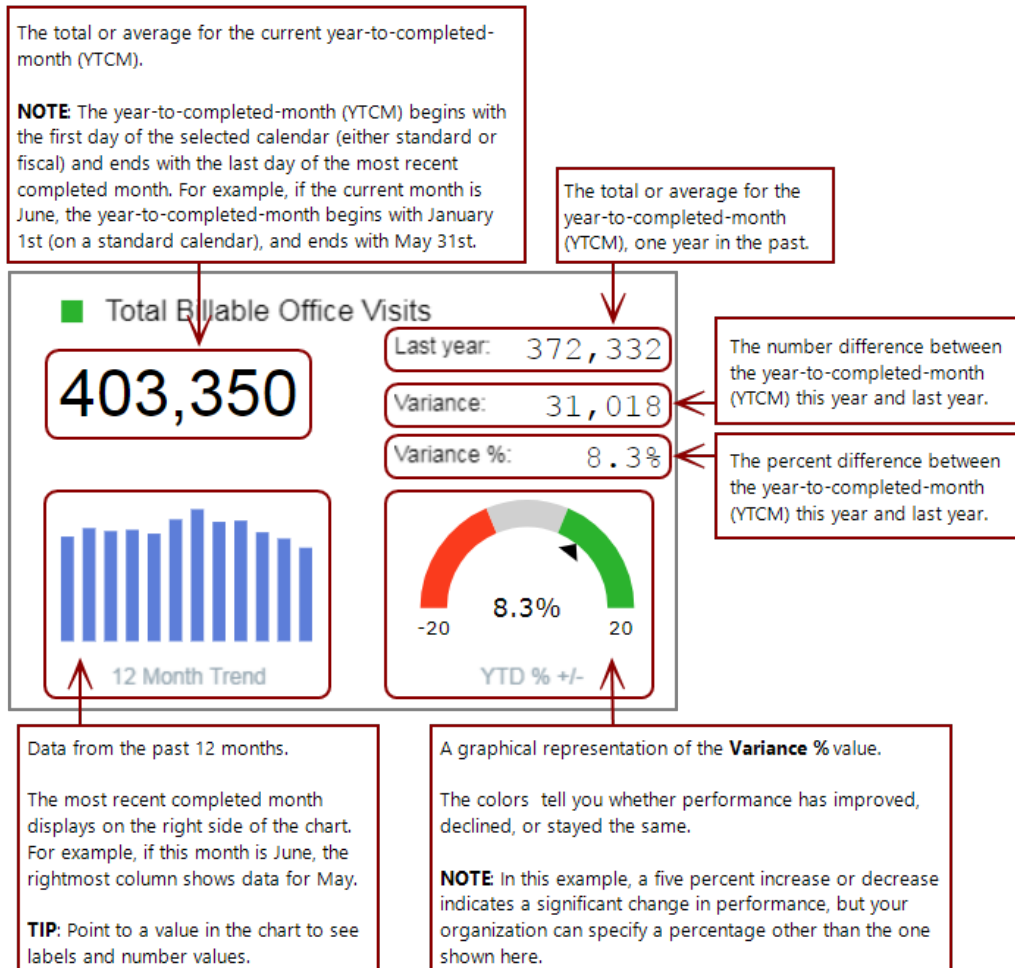
1. Each section of the page includes a list of measures on the left. Click a measure to view its data on the right.

The label above the data tells you which measure is selected.

TIP: The color to the left of the measure indicates whether performance has improved, declined, or stayed the same.



2. On the right, note the values:



Analyze the data

Choose the data that you want to analyze:


Data from a selected month, compared to the same month last year

1. Click the measure with the data you want to analyze.
The measure's data displays on the right.
2. On the bar chart, click the month with the data you want to analyze.
TIP: Point to a value in the chart to see labels and number values.
The **Default Analysis** page opens.
3. Note the date range:
 - The **Current** column shows data from the selected month.
 - The **Previous** column shows data from the same month, one year in the past.
4. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).
TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Data from the current year-to-completed-month (YTCM), compared to the same time-period last year

1. Click the measure with the data you want to analyze.
The measure's data displays on the right.
2. Below the measure name, click the value for the current year-to-completed-month (YTCM).
The **Default Analysis** page opens.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).
TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.


All data for a measure, with or without a time-period comparison

1. Click the measure with the data you want to analyze.
The measure's data displays on the right.
2. To the upper right of the measure name, click the **Analyze** icon .
The **Measure Overview** page opens.

3. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

1. Click the measure whose definition you want to view.
2. To the upper right of the measure name, click the **Analyze** icon .

The **Measure Overview** page opens.

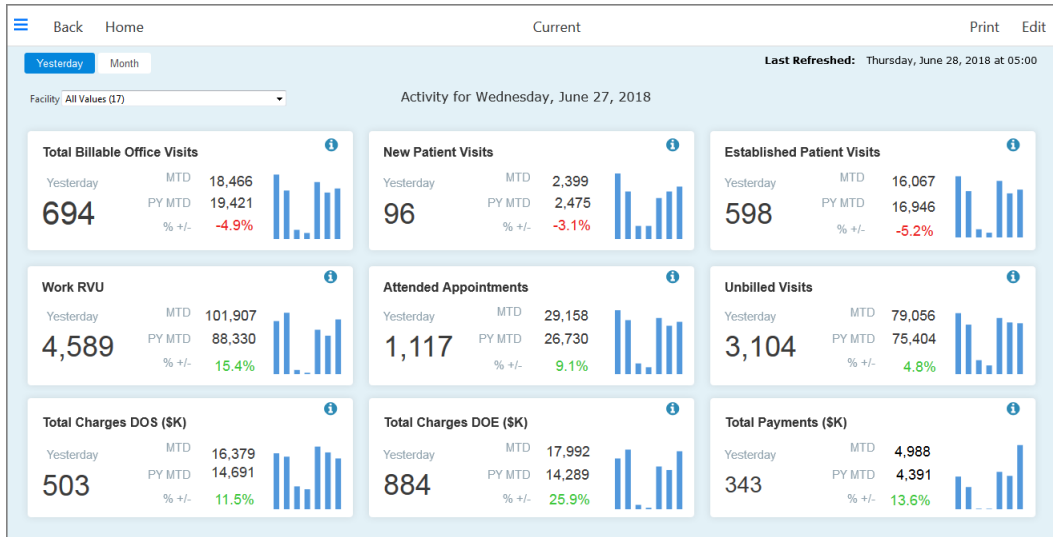
3. On the left, review the measure's definition and other details.

For more information, see [Viewing Measure Details on page 57](#).

Current

On the **Current** page, you can choose whether to work with data from today or from a particular month:

- [Current—Working with Yesterday's Data below](#)
- [Current—Working with Monthly Data on page 16](#)



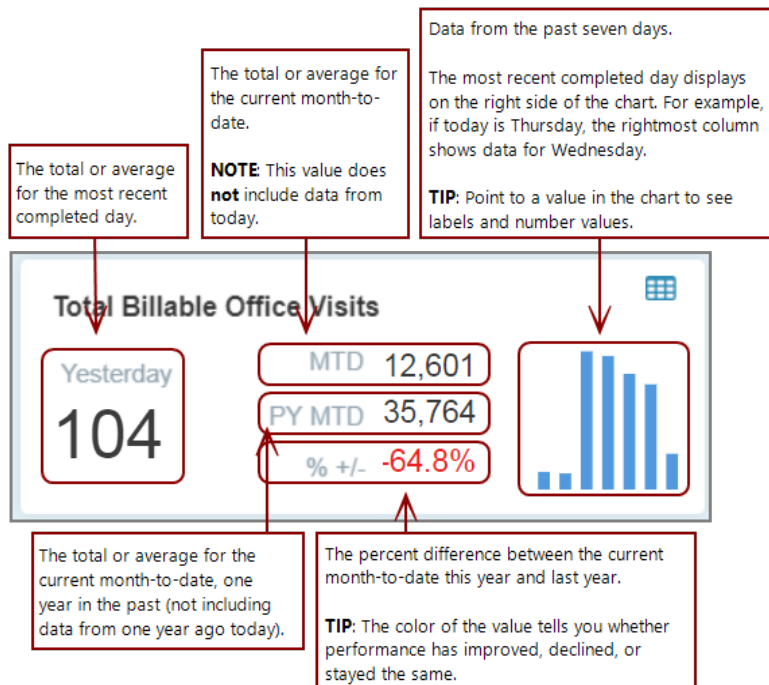
Current—Working with Yesterday's Data

Go to the dashboard and adjust your view

1. On the home page, click **Current**.
The **Current** page opens with the **Yesterday** tab selected.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.

Review the data

Note the values:



Analyze the data

Choose the data that you want to analyze:

Yesterday's data, compared to the day before

1. Below the measure that you want to work with, click the **Yesterday** value.

The **Default Analysis** page opens.

2. Note the date range:
 - The **Current Complete Day** column shows data from yesterday.
 - The **Previous Complete Day** column shows data from the day before yesterday.

3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Data from a selected day this week, compared to the same day last week

1. Below the measure that you want to work with, in the chart, click the value that you want to analyze.

TIP: Point to a value in the chart to see labels and number values.

The **Default Table** page opens.

2. Note the date range:
 - The **Current** column shows data from the selected day of the week.
 - The **Previous** column shows data from the same day, one week in the past.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Data from the current month-to-date, compared to the same time-period last year

1. Below the measure that you want to work with, click the **MTD** or **PY MTD** values.


NOTE: This value does **not** include data from today.

The **Default Analysis** page opens.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison


1. To the right of the measure that you want to work with, click the **Analyze** icon .

The **Measure Overview** page opens.

2. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

1. To the right of the measure that you want to work with, click the **Analyze** icon .

The **Measure Overview** page opens.

- On the left, review the measure's definition and other details.
For more information, see [Viewing Measure Details on page 57](#).

Current—Working with Monthly Data

Go to the dashboard and adjust your view

- On the home page, click **Current**.
The **Current** page opens.
- In the upper left, click the **Month** tab.
- In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
- In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
- In the **Year-Month** pull-down menu, select the time-period with the data that you want to view.

Review the data

- On the left, the **Date** column shows the dates that fall within the selected time-period.
TIP: To sort a column, click the column header.

Analyze the data

- In the table, click the value that you want to analyze.

Date	Day of Week	Work RVU
Totals	Totals	215,413
2016-08-01	Mon	12,819
2016-08-02	Tue	12,021
2016-08-03	Wed	12,562
2016-08-04	Thu	11,744

The **Default Measure Analysis** page opens.

- Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Operations

On the **Operations** page, you can choose whether to work with an overview of operational data, or operational data over a 12-month trend:

- [Operations—Working with Overview Data below](#)
- [Operations—Working with Trended Data on page 19](#)

Measures	MONTH TO DATE			CURRENT COMPLETE MONTH			YEAR TO DATE		
	Sep-2016	Sep-2015	% +/-	Aug-2016	Aug-2015	% +/-	2016	2015	% +/-
Volumes									
Total Encounters	178,087	318,978	-44.2% ▼	466,372	399,244	16.8% ▲	3,771,705	3,223,038	17.0% ▲
Total Billable Office Visits	12,601	35,764	-64.8% ▼	41,620	43,776	-4.9% ▲	403,350	372,332	8.3% ▲
New Patient Visits	1,704	4,755	-64.2% ▼	5,704	5,785	-1.4% ▲	56,701	49,154	15.4% ▲
Established Patient Visits	10,897	31,009	-64.9% ▼	35,916	37,991	-5.5% ▼	346,649	323,178	7.3% ▲
Consultation Visits	706	2,129	-66.8% ▼	2,332	2,588	-9.9% ▼	22,081	20,205	9.3% ▲
Hospital Visits	5,054	12,321	-59.0% ▼	17,461	15,370	13.6% ▲	186,633	125,748	48.4% ▲
Nursing Home Visits	33	383	-91.4% ▼	200	565	-64.6% ▼	3,400	4,167	-18.4% ▼
Transitional Care Visits	32	132	-75.8% ▼	174	184	-5.4% ▼	2,137	1,734	23.2% ▲
Home Services Visits	18	90	-80.0% ▼	79	92	-14.1% ▼	870	889	-2.1% ▲
Well Visits	1,134	3,113	-63.6% ▼	4,076	4,275	-4.7% ▲	30,785	29,509	4.3% ▲
Sick Visits	10,830	30,803	-64.8% ▼	35,542	37,265	-4.6% ▲	353,312	324,830	8.8% ▲
Professional Visits	24,519	63,074	-61.1% ▼	83,067	76,564	8.5% ▲	840,220	644,718	30.3% ▲
Total Visit Encounters	91,240	109,932	-17.0% ▼	195,959	131,427	49.1% ▲	1,394,842	1,102,003	26.6% ▲
Total RVU	131,229	280,353	-53.2% ▼	377,402	316,496	19.2% ▲	3,410,546	2,849,209	19.7% ▲
Work RVU	86,416	181,677	-52.4% ▼	250,674	209,594	19.6% ▲	2,288,012	1,865,694	22.6% ▲
Adj Work RVU	81,816	170,439	-52.0% ▼	238,171	198,347	20.1% ▲	2,182,582	1,773,009	23.1% ▲

Operations—Working with Overview Data

Go to the dashboard and adjust your view

1. On the home page, click **Operations**.
The **Operations** page opens with the **Overview** tab selected.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
4. In the **Calendar** pull-down menu, choose one of the following:
 - **Standard**, if you want to view data beginning with January of the current year
 - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

- The **Month to Date** area shows data for the current month-to-date this year, compared to the same time-period last year.

NOTE: This value does **not** include data from today.

- The **Current Complete Month** area shows data for the most recent completed month, compared to the same month last year.
- The **Year to Date** area shows data for the current year-to-completed-month (YTCM), compared to the same time-period last year.

NOTE: The year-to-completed-month (YTCM) begins with the first day of the selected calendar (either standard or fiscal) and ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month begins with January 1st (on a standard calendar), and ends with May 31st.

Analyze the data

Choose the data that you want to analyze:

Data from a time-period this year, compared to the same time-period last year

1. On the right, click the value that you want to analyze.

The **Default Analysis** page opens.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison

1. On the left, click the measure with the data you want to analyze.

The **Measure Overview** page opens.

2. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

1. On the left, click the measure whose definition you want to view.
The **Measure Overview** page opens.
2. On the left, review the measure's definition and other details.
For more information, see [Viewing Measure Details on page 57](#).

Operations—Working with Trended Data

Go to the dashboard and adjust your view

1. On the home page, click **Operations**.
The **Operations** page opens.
2. In the upper left, click the **Trends** tab.
3. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
4. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.

Review the data

Note the values:



Analyze the data

Choose the data that you want to analyze:

Data from a selected month, compared to the same month last year

1. In a chart, click the month with the data you want to analyze.
The **Default Analysis** page opens.
2. Note the date range:
 - The **Current** column shows data from the selected month.
 - The **Previous** column shows data from the same month, one year in the past.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Cumulative data from the past 12 months, compared to the same time-period last year

1. Below the measure that you want to work with, click the value for the current or previous 12 months.

NOTE: Make sure that the entire row is selected, rather than the column.


Cur 12 Months	Prev 12 Months	%+/-
23,176	23,357	-0.8%

The **Default Analysis** page opens.

2. Note the date range:
 - The **Current Rolling Year by Month** column shows cumulative data from the past 12 months.
 - The **Previous Rolling Year by Month** column shows cumulative data from the same 12 months, one year in the past.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison


1. To the right of the measure that you want to work with, click the **Analyze** icon .

The **Measure Overview** page opens.

2. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

1. To the right of the measure that you want to work with, click the **Analyze** icon .

The **Measure Overview** page opens.

2. On the left, review the measure's definition and other details.

For more information, see [Viewing Measure Details on page 57](#).

Revenue

On the **Revenue** page, you can choose whether to work with an overview of billing data, or billing data over a 12-month trend:

- [Revenue—Working with Overview Data below](#)
- [Revenue—Working with Trended Data on page 25](#)

The screenshot shows a dashboard for 'Revenue' with a 'Print' button. It features a 'Last Refreshed' timestamp of Saturday, September 24, 2016 at 05:00. The 'Facility' is set to 'All Values (90)' and the 'Calendar' is 'Standard'. The 'Year-to-Date Summary' shows 'Beginning Month: 2016-01' and 'Ending Month: 2016-08'. The main table displays measures for 'Sep-2016', 'Sep-2015', 'Aug-2016', 'Aug-2015', '2016', and '2015' with percentage changes and trend indicators.

Measures	MONTH TO DATE			CURRENT COMPLETE MONTH			YEAR TO DATE		
	Sep-2016	Sep-2015	% +/-	Aug-2016	Aug-2015	% +/-	2016	2015	% +/-
Volumes									
Total Charges (\$K)	14,376	29,437	-51.2%	41,631	32,693	27.3%	378,347	289,551	30.7%
Total Payments (\$K)	3,619	8,878	-59.2%	12,361	10,780	14.7%	109,448	92,903	17.8%
Insurance Payments (\$K)	3,218	7,779	-58.6%	11,043	9,482	16.5%	96,896	81,357	19.1%
Patient Payments (\$K)	401	1,099	-63.5%	1,318	1,298	1.5%	12,552	11,546	8.7%
Total Adjustments (\$K)	10,183	18,534	-45.1%	29,291	22,685	29.1%	263,311	195,816	34.5%
Ratios									
Avg Charge Lag Days	9.2	9.2	.1%	8.3	9.7	-14.8%	8.4	10.6	-20.3%
Gross Collection Ratio	.06	.32	-80.4%	.15	.32	-51.2%	.26	.31	-16.9%
Charge/Work RVU	166.35	162.03	2.7%	166.08	155.98	6.5%	165.36	155.20	6.5%
Charge/Adj Work RVU	175.71	172.71	1.7%	174.79	164.83	6.0%	173.35	163.31	6.1%
Charge/Total RVU	109.55	105.00	4.3%	110.31	103.30	6.8%	110.93	101.62	9.2%
Charge/Visit	46.56	114.22	-59.2%	74.88	114.89	-34.8%	99.94	114.60	-12.8%
Payment/Work RVU	20.47	73.24	-72.1%	47.50	72.52	-34.5%	67.60	70.29	-3.8%
Payment/Visit	4.91	46.09	-89.4%	18.14	46.72	-61.2%	36.61	45.86	-20.2%

Revenue—Working with Overview Data

Go to the dashboard and adjust your view

1. On the home page, click **Revenue**.
The **Revenue** page opens with the **Overview** tab selected.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
4. In the **Calendar** pull-down menu, choose one of the following:
 - **Standard**, if you want to view data beginning with January of the current year
 - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

- The **Month to Date** area shows data for the current month-to-date this year, compared to the same time-period last year.

NOTE: This value does **not** include data from today.

- The **Current Complete Month** area shows data for the most recent completed month, compared to the same month last year.
- The **Year to Date** area shows data for the current year-to-completed-month (YTCM), compared to the same time-period last year.

NOTE: The year-to-completed-month (YTCM) begins with the first day of the selected calendar (either standard or fiscal) and ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month begins with January 1st (on a standard calendar), and ends with May 31st.

Analyze the data

Choose the data that you want to analyze:

Data from a time-period this year, compared to the same time-period last year

1. On the right, click the value that you want to analyze.

The **Default Analysis** page opens.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison

1. On the left, click the measure with the data you want to analyze.

The **Measure Overview** page opens.

2. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

1. On the left, click the measure whose definition you want to view.
The **Measure Overview** page opens.
2. On the left, review the measure's definition and other details.
For more information, see [Viewing Measure Details on page 57](#).

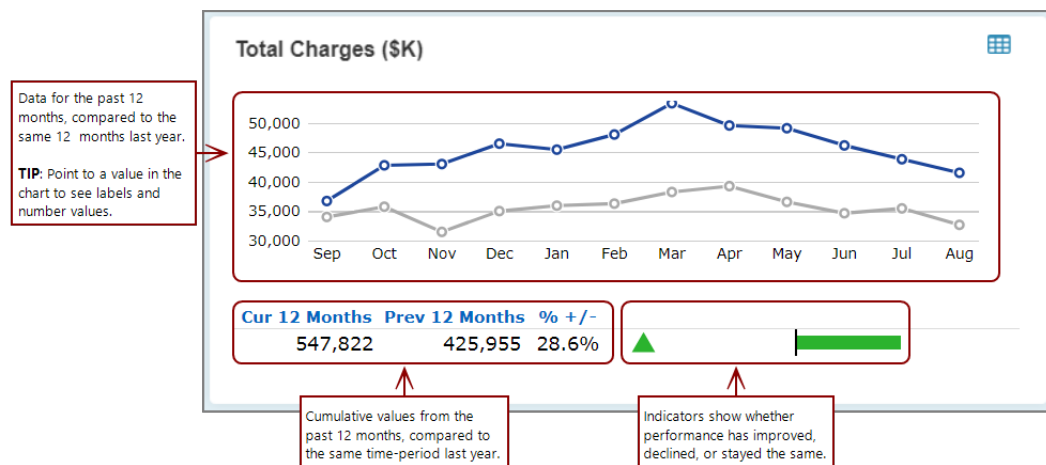
Revenue—Working with Trended Data

Go to the dashboard and adjust your view

1. On the home page, click **Revenue**.
The **Revenue** page opens.
2. In the upper left, click the **Trends** tab.
3. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
4. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.

Review the data

Note the values:



Analyze the data

Choose the data that you want to analyze:

Data from a selected month, compared to the same month last year

1. In a chart, click the month with the data you want to analyze.
The **Default Analysis** page opens.
2. Note the date range:
 - The **Current** column shows data from the selected month.
 - The **Previous** column shows data from the same month, one year in the past.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Cumulative data from the past 12 months, compared to the same time-period last year

1. Below the measure that you want to work with, click the value for the current or previous 12 months.

NOTE: Make sure that the entire row is selected, rather than the column.


Cur 12 Months	Prev 12 Months	%+/-
23,176	23,357	-0.8%

The **Default Analysis** page opens.

2. Note the date range:
 - The **Current Rolling Year by Month** column shows cumulative data from the past 12 months.
 - The **Previous Rolling Year by Month** column shows cumulative data from the same 12 months, one year in the past.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison


1. To the right of the measure that you want to work with, click the **Analyze** icon .

The **Measure Overview** page opens.

2. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

1. To the right of the measure that you want to work with, click the **Analyze** icon .

The **Measure Overview** page opens.

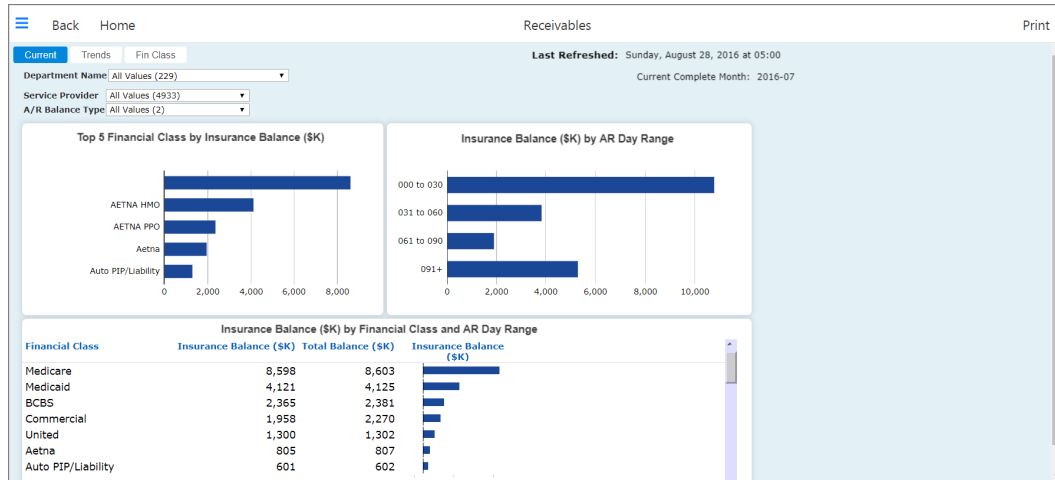
2. On the left, review the measure's definition and other details.

For more information, see [Viewing Measure Details on page 57](#).

Receivables

On the **Receivables** page, you can choose whether to work with current or trended data about the balances in accounts receivable.

- [Receivables—Working with Current Data below](#)
- [Receivables—Working with Trended Data on page 31](#)



Receivables—Working with Current Data

Go to the dashboard and adjust your view

1. On the home page, click **Receivables**.
The **Receivables** page opens with the **Current** tab selected.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. Below the **Last Refreshed** field, note the year and month that the data on this page is from.
4. In the **Department Name** pull-down menu, choose whether to view all balances, or only balances that were billed against a certain department.
5. In the **Service Provider** pull-down menu, choose whether to view all balances, or only balances that were billed against a certain provider.
6. In the **A/R Balance Type** pull-down menu, select one of the following:
 - **All Values**, if you want to view the net value of the balances in accounts receivable. When **All Values** is selected, the data shows the

difference between the payments made to your organization, and the payments that your organization owes.

- **Credit**, if you want to view payments to be deducted from your organization. For example, your organization might owe a payment to an insurance company.
- **Debit**, if you want to view payments to be made to your organization.

Review the data

NOTE: These values represent thousands of dollars. For example, read 100 as 100,000.

- Along the top of the page, charts show data about insurance balance:
 - The **Top 5 Financial Class by Insurance Balance (\$K)** chart displays the insurance providers with the greatest balances.
 - The **Insurance Balance (\$K) by AR Day Range** chart displays the amount of time (for example, between 0 and 30 days) that the balances have been in accounts receivable.
- Below the charts, you can view number data about insurance balance, compared to total balance:
 - To view data by insurance provider, click the leftmost column header and select **Financial Class**.
 - To view data by number of days in accounts receivable, click the leftmost column header and select **Days in A/R - Dim**.

Analyze the data

1. In a chart, click the value that you want to analyze.

TIP: Point to a value in the chart to see labels and number values.

The **Default Analysis** page opens.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Receivables—Working with Trended Data

Go to the dashboard and adjust your view

1. On the home page, click **Receivables**.
The **Receivables** page opens.
2. In the upper left, choose one of the following:
 - **Trends**, if you want to work with data about the number of days the balances have been in accounts receivable.
 - **Fin Class**, if you want to work with data about balances by insurance provider.
3. In the **Department Name** pull-down menu, choose whether to view all balances, or only balances that were billed against a certain department.
4. In the **Service Provider** pull-down menu, choose whether to view all balances, or only balances that were billed against a certain provider.
5. In the **A/R Balance Type** pull-down menu, select one of the following:
 - **All Values**, if you want to view the net value of the balances in accounts receivable. When **All Values** is selected, the data shows the difference between the payments made to your organization, and the payments that your organization owes.
 - **Credit**, if you want to view payments to be deducted from your organization. For example, your organization might owe a payment to an insurance company.
 - **Debit**, if you want to view payments to be made to your organization.
6. In the **Current Date** pull-down menu, select the date on which you want the data to end.

Review the data

The table displays measure data by month:

- The table begins with the first month of the selected calendar. For example, January is the first month of the standard calendar.
- The data in the rightmost column ends on the selected date.

Physicians

On the **Physicians** page, you can choose whether to work with data about many encounter service providers, or only one encounter service provider:

- [Physicians—Working with Data About Many Physicians below](#)
- [Physicians—Working with Data About One Physician on the next page](#)

Encounter Service Provider	TOTAL BILLABLE OFFICE VISITS			NEW PATIENT VISITS			ESTABLISHED PATIENT VISITS		
	Cur	Prev	% +/-	Cur	Prev	% +/-	Cur	Prev	% +/-
Zimmerman, V (PHY_004742)	1,525	77	1,880.5%	175	20	775.0%	1,350	57	2,268.4%
Zimmerman, Q (PHY_001105)	1,219	2,332	-47.7%	389	665	-41.5%	830	1,667	-50.2%
York, H (PHY_019575)	218	19	1,047.4%	18	1	1,700.0%	200	18	1,011.1%
Yates, R (PHY_024553)	455	543	-16.2%	9	15	-40.0%	446	528	-15.5%
Wynn, Y (PHY_024661)	96	54	77.8%	0	3	-100.0%	96	51	88.2%
Wynn, U (PHY_002569)		1	-100.0%		1	-100.0%		0	
Wyatt, K (PHY_002911)	190	315	-39.7%	67	89	-24.7%	123	226	-45.6%
Wyatt, J (PHY_004131)	2,875	2,519	18.1%	1,021	849	20.3%	1,954	1,670	17.0%
Wright, I (PHY_004324)	2,108	1,714	23.0%	333	261	27.6%	1,775	1,453	22.2%
Wright, D (PHY_003128)	593	548	8.2%	61	57	7.0%	532	491	8.4%
Wooten, A (PHY_024654)	2,035	1,741	16.9%	571	563	1.4%	1,464	1,178	24.3%
Woodward, O (PHY_020085)	6			0			6		
Wong, J (PHY_026452)	820			17			803		
Wolfe, V (PHY_002762)	1	0		0	0		1	0	
Wolfe, K (PHY_017736)		1	-100.0%		0			1	-100.0%
Wilson, Y (PHY_016113)	0	1	-100.0%	0	0		0	1	-100.0%
Williamson, O (PHY_005161)	1	7	-85.7%	0	0		1	7	-85.7%
Williamson, B (PHY_023120)	865	600	44.2%	205	143	43.4%	660	457	44.4%
Williams, T (PHY_005292)	0	1	-100.0%	0	1	-100.0%	0	0	
Williams, A (PHY_045012)	110	4	2,650.0%	18	3	500.0%	92	1	9,100.0%

Physicians—Working with Data About Many Physicians

Go to the dashboard and adjust your view

1. On the home page, click **Physicians**.
The **Physicians** page opens with the **Summary** tab selected.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
4. In the **Department Name** pull-down menu, choose whether to view data about all encounter service providers or only encounter service providers that work in a particular department.
5. In the **Calendar** pull-down menu, choose one of the following:
 - **Standard**, if you want to view data beginning with January of the current year

- **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

- A list of encounter service providers displays on the left.

TIP: Click the name of an encounter service provider to see information specific to them. For more information, see [Physicians—Working with Data About One Physician below](#).

- Each area of the page shows data from the current year-to-completed-month, compared to the same time-period last year.

NOTE: The year-to-completed-month (YTCM) begins with the first day of the selected calendar (either standard or fiscal) and ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month begins with January 1st (on a standard calendar), and ends with May 31st.

TIP: To sort a column, click the column header. It can be useful to sort a column in descending order, so that the individuals with the most data display at the top of the list.

Analyze the data

1. To the right of the encounter service provider's name, click the value that you want to analyze.

The **Default Measure Analysis** page opens.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Physicians—Working with Data About One Physician

Go to the dashboard and adjust your view

1. On the home page, click **Physicians**.

The **Physicians** page opens.

2. In the **Facility** pull-down menu, select the facility where the encounter service provider works.

3. In the **Department Name** pull-down menu, select the encounter service provider's department.
4. On the left, click the name of the encounter service provider whose information you want to view.

TIP: You can use your web browser's Find feature (typically, **Ctrl+F**) to search for the encounter service provider's name.

The **Scorecard** tab opens, displaying information about the selected encounter service provider.

5. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
6. In the **Calendar** pull-down menu, choose one of the following:
 - **Standard**, if you want to view data beginning with January of the current year
 - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

- In the **Measures** area, note the values:

Measures	Aug-2016	2016	2015	% +/-	
Total Billable Office Visits	23	212	188	12.8%	▲
New Patient Visits	13	70	81	-13.6%	▼
Established Patient Visits	10	142	107	32.7%	▲
Hospital Visits					
Total Encounters	76	594	543	9.4%	▲
Work RVU	54	345	387	-10.8%	▼
Total Charges (\$K)	9	52	51	1.9%	▲
Charge/Work RVU	167.26	150.40	131.61	14.3%	▲
Total Payments (\$K)	3	20	21	-6.2%	▼

Data from the current month-to-date.
NOTE: This value does **not** include data from today.

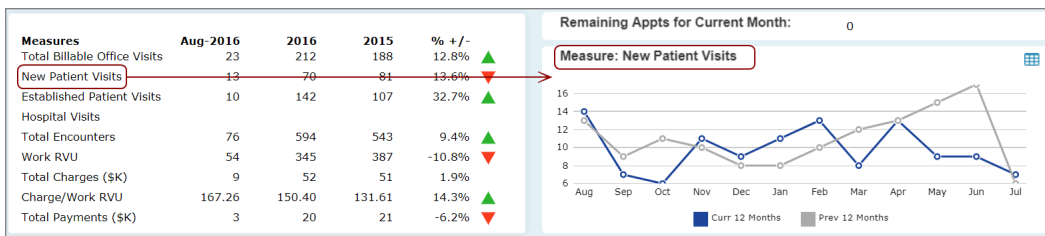
Data from the current year-to-completed-month, and the same time-period last year.
NOTE: The year-to-completed-month (YTCM) begins with the first day of the selected calendar (either standard or fiscal) and ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month begins with January 1st (on a standard calendar), and ends with May 31st.

The percent difference between the current and previous year-to-completed-months.

- To view trended data, click the name of a measure in the **Measures** area.

On the right, the data displays in a chart.

TIP: Point to a value in the chart to see labels and number values.



- In the lower half of the page, select the type of data that you want to view. For example, you can select **Procedure** to view data about the procedures that the encounter service provider has performed.

TIP: To sort a column, click the column header.

Analyze the data

Choose the data that you want to analyze:

Data from a selected month, compared to the same month last year

1. In the **Measures** area, click the measure that you want to work with. On the right, the measure's data displays in the chart.
2. In the chart, click the month with the data you want to analyze.

TIP: Point to a value in the chart to see labels and number values.

The **Default Analysis** page opens.

3. Note the date range:
 - The **Cur 12 Months** column shows data from the selected month.
 - The **Prev 12 Months** column shows data from the same month, one year in the past.
4. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Data from the current month-to-date, compared to the current and previous year-to-completed-months (YTCM)

1. In the **Measures** area, click the value that you want to analyze.

NOTE: The values in the month-to-date column do **not** include data from today.

The **Default Analysis** page opens.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Data about a particular medical area for the current year-to-completed-month (YTCM), compared across various measures

1. In the lower half of the page, select the type of data that you want to view.
For example, you can select **Procedure** to view data about the procedures that the attending provider has performed.

2. In the table, click the value that you want to analyze.

The **Default Analysis** page opens.

3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison

1. In the **Measures** area, click the measure that you want to work with.
On the right, the measure's data displays in the chart.

2. To the upper right of the chart, click the **Analyze** icon .

The **Measure Overview** page opens.

3. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)

For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

1. In the **Measures** area, click the measure that you want to work with.
On the right, the measure's data displays in the chart.

2. To the upper right of the chart, click the **Analyze** icon .

The **Measure Overview** page opens.

3. On the left, review the measure's definition and other details.

For more information, see [Viewing Measure Details on page 57](#).

Facilities

On the **Facilities** page, you can choose whether to work with overview data about a department, or detailed data about a facility and its departments:

- [Facilities—Working with Data About a Department below](#)
- [Facilities—Working with Data About a Facility and Its Departments on the next page](#)

Measures	TOTAL BILLABLE OFFICE VISITS			NEW PATIENT VISITS			ESTABLISHED PATIENT VISITS		
	Cur	Prev	% +/-	Cur	Prev	% +/-	Cur	Prev	% +/-
ENG SKAGEN	7,409	8,471	-12.5%	1,069	1,143	-6.5%	6,340	7,328	-13.5%
FAIRFAX COMMUNITY HEALTH CENTER	14,997	12,383	21.1%	1,787	1,499	19.2%	13,210	10,884	21.4%
GPL CARDIOLOGY @ GEORGETOWN	8,108	7,329	10.6%	777	767	1.3%	7,331	6,562	11.7%
GPL CARDIOLOGY @ METRO	4,801	4,959	-3.2%	613	565	8.5%	4,188	4,394	-4.7%
GPL GEORGETOWN	18,217	18,512	-1.6%	845	1,275	-33.7%	17,372	17,237	.8%
GPL ROBIN CT B	9,166	9,537	-3.9%	830	782	6.1%	8,336	8,755	-4.8%
GPL Robin CT A	1,905	2,064	-7.7%	368	378	-2.6%	1,537	1,686	-8.8%
GPL SPRINGFIELD ACRES A	7,707	8,587	-10.2%	215	233	-7.7%	7,492	8,354	-10.3%
GPL WEST CAPE	9,472	10,575	-10.4%	485	807	-39.9%	8,987	9,768	-8.0%
LCD OPEN FIELD	22,474	21,204	6.0%	6,600	6,458	2.2%	15,874	14,746	7.6%
LONGWOOD HOSPITAL	8,878	8,388	5.8%	948	746	27.1%	7,930	7,642	3.8%
MAPLEWOOD HOSPITAL	13,789	10,694	28.9%	2,275	1,493	52.4%	11,514	9,201	25.1%
MED PLAZA ONE	5,470	4,626	18.2%	709	459	54.5%	4,761	4,167	14.3%
OPEN FIELD A	13,316	13,597	-2.1%	390	387	.8%	12,926	13,210	-2.1%
OUT PATIENT GEORGETOWN	5,535	5,008	10.5%	574	465	23.4%	4,961	4,543	9.2%
PAGE FIELD B	6,912	7,106	-2.7%	1,719	1,720	-.1%	5,193	5,386	-3.6%
PINE ISLAND ROAD	38,600	35,729	8.0%	8,199	7,093	15.6%	30,401	28,636	6.2%
PLANTATION WOUND CARE	5,569	3,968	40.3%	647	455	42.2%	4,922	3,513	40.1%
RIVERWAY AMBULATORY	4,552	5,854	-22.2%	910	1,009	-9.8%	3,642	4,845	-24.8%
SANCTUARY OP	29,845	25,939	15.1%	4,219	2,595	62.6%	25,626	23,344	9.8%
SH	2,674	1,383	93.3%	1,256	634	98.1%	1,418	749	89.3%
SOUTH POINT	14,719	17,622	-16.5%	703	983	-28.5%	14,016	16,639	-15.8%
SPRINGFIELD HOSPITAL	18,105	14,712	23.1%	2,726	2,476	10.1%	15,379	12,236	25.7%

Facilities—Working with Data About a Department

Go to the dashboard and adjust your view

1. On the home page, click **Facilities**.
The **Facilities** page opens with the **Summary** tab selected.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Department Name** pull-down menu, select the department whose data you want to view.
4. In the **Calendar** pull-down menu, choose one of the following:
 - **Standard**, if you want to view data beginning with January of the current year
 - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

- On the left, the **Facility** column displays the facilities that the selected department is part of.

TIP: To see detailed information about the department, click the name of its facility. For more information, see [Facilities—Working with Data About a Facility and Its Departments below](#).

- The values on the right apply to the selected department only. Each area of the page shows data from the current year-to-completed-month, compared to the same time-period last year.

NOTE: The year-to-completed-month (YTCM) begins with the first day of the selected calendar (either standard or fiscal) and ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month begins with January 1st (on a standard calendar), and ends with May 31st.

TIP: To sort a column, click the column header.

Analyze the data

To analyze data about a department for the current year-to-completed-month (YTCM), compared to the same time-period last year:

1. Click the **Cur** or **Prev** value that you want to analyze.
The **Default Measure Analysis** page opens.
2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Facilities—Working with Data About a Facility and Its Departments

Go to the dashboard and adjust your view

1. On the home page, click **Facilities**.
The **Facilities** page opens.
2. On the left, click the name of the facility that you want to see details about.

TIP: You can use your web browser's Find feature (typically, **Ctrl + F**) to search for the facility's name.

The **Scorecard** tab opens, displaying information about the selected facility.

3. Choose whether to view data from the entire facility, or only one of its departments:
 - If you want to view data from the entire facility, confirm that the **Department Name** pull-down menu shows **All Values**.
 - If you want to view data from a certain department, select it in the **Department Name** pull-down menu.
4. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
5. In the **Calendar** pull-down menu, choose one of the following:
 - **Standard**, if you want to view data beginning with January of the current year
 - **Fiscal**, if you want to view data beginning with the first month in your organization's fiscal calendar

On the right, the **Year-to-Date Summary** updates based on your selection.

Review the data

- In the **Measures** area, note the values:

Measures	Aug-2016	2016	2015	% +/-	
Total Billable Office Visits	92	838	789	6.2%	▲
New Patient Visits	2	56	43	30.2%	▲
Established Patient Visits	90	782	746	4.8%	
Hospital Visits					
Total Encounters	1,953	15,882	15,805	.5%	
Work RVU	308	3,743	3,240	15.6%	▲
Total Charges (\$K)	39	415	387	7.2%	▲
Charge/Total RVU	90.11	93.45	91.49	2.1%	
Total Payments (\$K)	13	112	98	14.7%	▲

Data from the current month-to-date.

NOTE This value does **not** include data from today.

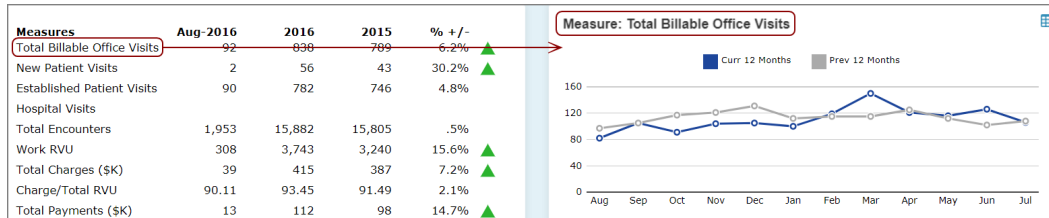
Data from the current year-to-completed-month, and the same time-period last year.

NOTE The year-to-completed-month (YTCM) begins with the first day of the selected calendar (either standard or fiscal) and ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month begins with January 1st (on a standard calendar), and ends with May 31st.

The percent difference between the current and previous year-to-completed-months.

- To view trended data, click the name of a measure in the **Measures** area. On the right, the data displays in a chart.

TIP: Point to a value in the chart to see labels and number values.



- In the lower half of the page, select the type of data that you want to view. For example, you can select **Procedure** to view data about the procedures that have been performed at the facility or department.

TIP: To sort a column, click the column header.

Analyze the data

Choose the data that you want to analyze:

Data from a selected month, compared to the same month last year

- In the **Measures** area, click the measure with the data that you want to analyze.

On the right, the measure's data displays in the chart.

- In the chart, click the month with the data you want to analyze.

TIP: Point to a value in the chart to see labels and number values.

The **Default Analysis** page opens.

- Note the date range:
 - The **Cur 12 Months** column shows data from the selected month.
 - The **Prev 12 Months** column shows data from the same month, one year in the past.
- Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.


Data from the current month-to-date, compared to the current and previous year-to-completed-months (YTCM)

1. In the **Measures** area, click the value that you want to analyze.
The **Analysis** page opens.
2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).
TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.


Data about a particular medical area for the current year-to-completed-month (YTCM), compared across various measures

1. In the lower half of the page, select the type of data that you want to view.
For example, you can select **Procedure** to view data about the procedures that have been performed at the facility or department.
2. In the table, click the value that you want to analyze.
The **Default Analysis** page opens.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).
TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

All data for a measure, with or without a time-period comparison

1. In the **Measures** area, click the measure with the data that you want to analyze.
On the right, the measure's data displays in the chart.
 2. To the upper right of the chart, click the **Analyze** icon .
 3. Do one of the following:
 - Analyze how the data has changed over time (default analysis)
 - Analyze how the data compares to other measures, without a time-period comparison (custom analysis)
- For more information, see [Analyzing Measure Data on page 61](#).

View the definition of a measure

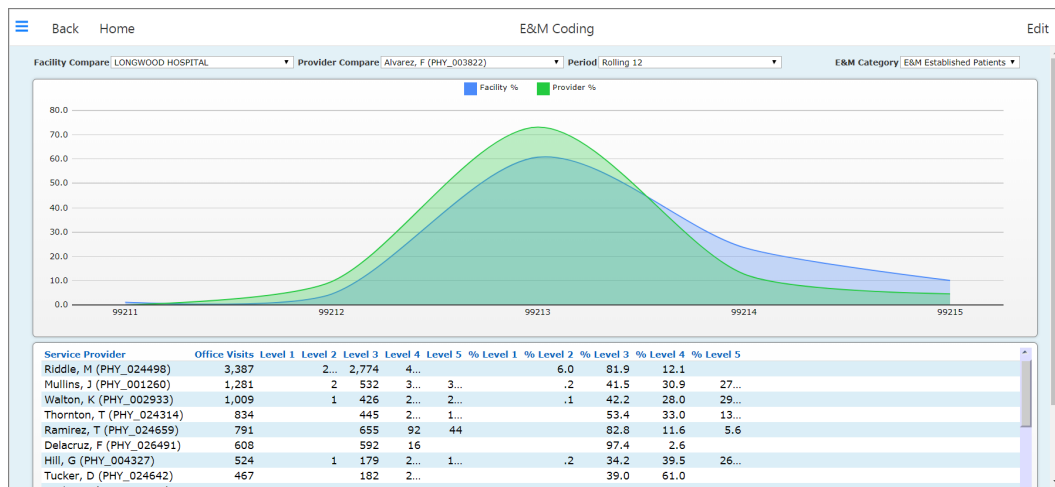
1. In the **Measures** area, click the measure whose definition you want to view.
On the right, the measure's data displays in the chart.
2. To the upper right of the chart, click the **Analyze** icon .

The **Measure Overview** page opens.

3. On the left, review the measure's definition and other details.

For more information, see [Viewing Measure Details on page 57](#).

E&M Coding



What is E&M coding?

Who is this data useful for? Staff members, such as administrators or ambulatory physicians, who are familiar with evaluation and management (E&M) codes.

What can this data tell me? The E&M Coding dashboard can help you identify patterns in the distribution of evaluation and management patient visits—for example, office visits, hospital visits, and consults. This is useful for determining the complexity of a visit.

Go to the dashboard and adjust your view

1. On the home page, click **E&M Coding**.
2. In the **Facility Compare** pull-down menu, select the facility with the data that you want to view.
3. In the **Provider Compare** pull-down menu, select the provider whose data you want to view.

The spline chart displays data about the provider's evaluation and management visits, compared to the facility distribution.

4. In the **Period** pull-down menu, choose one of the following:
 - **Rolling 12**, if you want to view cumulative data from the past 12 completed months.
 - **CYTD**, if you want to view data from the current year-to-completed-

month.

NOTE: The year-to-completed-month (YTCM) ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month ends with May 31st.

5. In the **E&M Category** pull-down menu, select the type of visit that you want to view. For example, select **E&M Established Patients** if you want to view data about established outpatient visits.

Review the data

- In the spline chart, you can view the types of visits that provider completed, compared to the facility distribution.

TIP: Point to a value in the chart to see labels and number values.

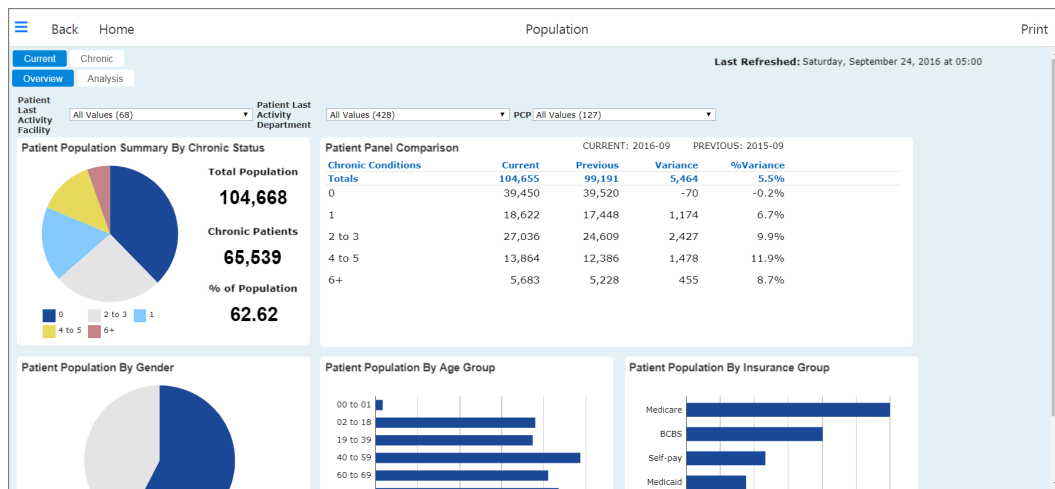
- The billing codes along the x-axis of the chart correspond to the visit levels in the table. For example, a code of 99211 corresponds to a Level 1 visit.
- In the table, you can view each provider's total number of office visits of the selected type, compared to the number and percentage of visits of each level.

TIP: To sort a column, click the column header.

Population

On the **Population** page, you can choose whether to view information about all patients from the current month, or chronic patients from a month that you specify:

- [Population—Working with Data About This Month's Patients below](#)
- [Population—Working with Data About Chronic Patients on the next page](#)



Population—Working with Data About This Month's Patients

Go to the dashboard and adjust your view

1. On the home page, click **Population**.
The **Population** page opens with the **Current Population > Overview** tab selected.
2. In the upper right, note the date and time that the data was last updated, in the **Last Refreshed** field.
3. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
4. In the **PCP** pull-down menu, choose whether to view data about all patients or only patients that have a certain primary care provider.

NOTE: The PCP is the patient's primary care provider of record as of the current completed month.

Review the data

- The charts display demographic data about this month's patient population.
TIP: Point to a value in the chart to see labels and number values.
- The **Patient Panel Comparison** table shows data about patients for the current month-to-date, compared to the same time-period last year.
TIP: To sort a column, click the column header.

Analyze the data

1. In the upper left, click the **Analysis** tab.
2. In the **Department** pull-down menu, select the department with the data you want to analyze.
3. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

Population—Working with Data About Chronic Patients

Go to the dashboard and adjust your view

1. On the home page, click **Population**.
2. In the upper left, click the **Past Chronic Conditions** tab.
3. On the right, in the **Panel Year-Month** pull-down menu, select the time-period with the data you want to view.
4. On the left, in the **PCP** pull-down menu, choose whether to view data about all patients or only patients that have a certain primary care provider.
NOTE: The PCP is the patient's primary care provider of record as of the selected month.
5. In the **Facility** pull-down menu, choose whether to view data for all facilities or one facility.
6. In the **Chronic Condition** pull-down menu, select the chronic condition that you want to work with.

Review the data

- The charts display demographic data about the selected chronic population.
The population counts all patients that have the chronic condition, including patients that have comorbidities.
TIP: Point to a value in the chart to see labels and number values.

- The **Patient Panel Comparison** table shows data about the chronic population for the selected month, compared to the same month last year.
TIP: To sort a column, click the column header.

View details about patients

1. In a chart, click the value that you want to view information about.
The **Patient Details** page opens.
2. Use the following columns to view data about a patient's visits:
 - **Last Activity**—Displays the date of the patient's last completed visit
 - **Next Activity**—Displays the date of the patient's next visit, if one is scheduled
 - **Patient Last Activity Department**—Displays the location of the patient's last completed visit
 - **Patient Next Appt Department**—Displays the location of the patient's next visit, if one is scheduled
3. Use the **Chronic Conditions** column to view a patient's comorbidities.
NOTE: If some text appears to be incomplete, point to the row to view it.

Patient Next Appt Department	Chronic Conditions
	Acquired Hypothyroidism-AMI-Anemia-Hyperlipidemia-...
RB CARDIOLOGY	AMI-Asthma-Benign Prostatic Hyperplasia-COPD-Depr...
	Acquired Hypothyroidism-AMI-Anemia-Hyperlipidemia-...
	AMI-Anemia-Asthma-Heart Failure-Hyperlipidemia-Hyp...
ENDO BOS	AMI-Diabetes-Hyperlipidemia-Hypertension-Ischemic ...

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Analyze the data

1. In the upper left, click the **Analysis** tab.
2. In the **Panel-Year Month** pull-down menu, select the time-period with the data you want to analyze.
3. In the **Chronic Condition** pull-down menu, select the chronic condition with the data you want to analyze.
4. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

Diving

What Is Diving?

Diving is the process of displaying progressively detailed levels of data for analysis. You can dive through multiple layers of data, with each subsequent dive showing more detail.

In DivePort, you dive on tabular data. When you dive, you select a dimension, which in turn, determines the values that appear.

For example, suppose that you are monitoring immunization orders, and your DivePort page provides a table with order information for many medical offices.

Home Location	Orders R12	Orders YTD	Orders MTD	Orders LMTD	MTD Change
Totals	120,710	28,620	900	500	400
Abbott Medical Associates	129	129	0	0	0
Adair Medical Associates	1	0	0	0	0
Ainsworth Medical Associates	3,200	839	21	22	-1
Akron Medical Associates	4,856	1,230	109	41	68
Albion Medical Associates	4,008	888	17	18	-1
Alexander Medical Associates	7,745	1,661	28	5	23
Allen Medical Associates	11	0	0	0	0
Allendorf Medical Associates	5	0	0	0	0
Almoral Medical Associates	5,219	1,029	28	29	-1
Alton Medical Associates	4,543	1,118	21	41	-20
Amber Medical Associates	8,103	2,314	32	83	-51
Ambrose Medical Associates	1,947	481	14	2	12
Anamosa Medical Associates	12	0	0	0	0

If diving is enabled, you can click a row to display more detail. For example, Alexander Medical Associates.

A new window shows data specific to that location. In this case, the number of immunizations that each physician ordered.

Order Detail					
Current Order Date	2016-03-31	Home Location	Alexander Medical Associates		
Physician	Orders R12	Orders YTD	Orders MTD	Orders Last MTD	Change
Totals	7,793	1,633	570	449	121
Ferguson, Edwin	989	185	72	27	45
Jacobs, Nick	904	217	100	53	47
Noel, Ramona	1,035	274	88	117	-29
Pearson, Lula	2,086	410	117	106	11
Roy, Wesley	775	130	15	60	-45
Solomon, Sean	2,004	417	178	86	92

Next, you could dive on a row to see more detail about the immunizations that a specific physician ordered. For Example Dr. Ferguson.

Order Detail			
Current Order Date	2016-03-31	Home Location	Alexander Medical Associates
Ferguson, Edwin			
Order Description	Orders R12	Orders YTD	Orders MTD
Totals	989	185	72
BETA HCG QUANTITATIVE	1	0	0
BRAZIL NUT (F18) IGE	1	0	0
C-REACTIVE PROTEIN	12	6	3
C.TRACHOMATIS DNA SDA	1	0	0
C.TRACHOMATIS RNA TMA	1	0	0
CARDIOLOGY EVAL & TREAT	7	1	1
CASEIN (F78) IGE	1	0	0
CASHEW NUT (F202) IGE	1	0	0
CBC (H/H,RBC,IND,WBC,PLT)	69	13	1
CBC W/ DIFF AND PLT	102	21	6
CELIAC DISEASE COMPLETE PANEL	1	0	0
CHESTNUT(SWEET)(F299) IGE	1	0	0
CHLAMYDIA/GC RMA, TMA	9	1	0
CLAM (F207) IGE	3	0	0
CODFISH (F3) IGE	3	0	0
COMPLETE METABOLIC PANEL	42	13	4
COMPONENT, EGG	1	0	0

Diving on a Tabular Display

Your DivePort administrator can enable an option that allows you to select a different dimension to display or dive on data. When these options are enabled, you can:

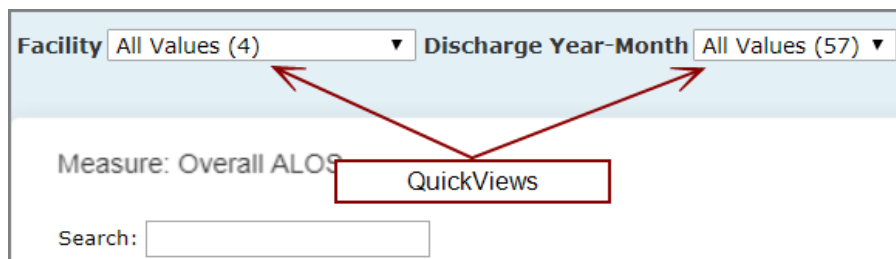
- Click a header and change the dimension values that display, (if change dimension is enabled).
- Click a row and select a dimension to dive on from diveable dimensions list (if diving is enabled).

1. Browse to the data you want to dive on.

Dimension values display in the leftmost columns. Numeric data values display in the columns to the right of the dimension columns.

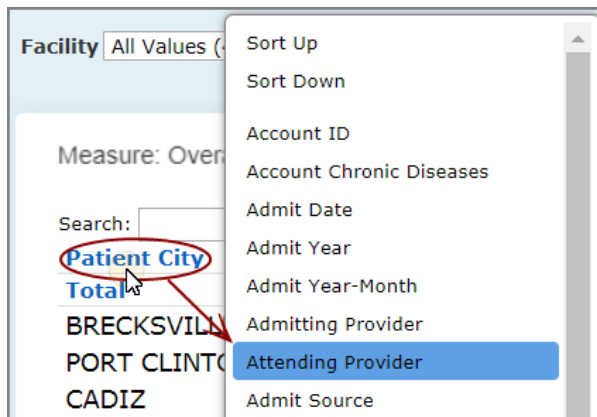
Patient City	Overall ALOS	Exp ALOS	+/-
Total	4.35	4.4	-0.1
BRECKSVILLE	20.00	33.2	-13.2
PORT CLINTON	24.00	32.2	-8.2
CADIZ	7.00	14.0	-7.0
GRANVILLE	64.00	13.3	50.7
NORTHWOOD	22.00	13.3	8.7

2. If pull-down menus are available, use them to adjust your view of the data.



The values update based on your selections.

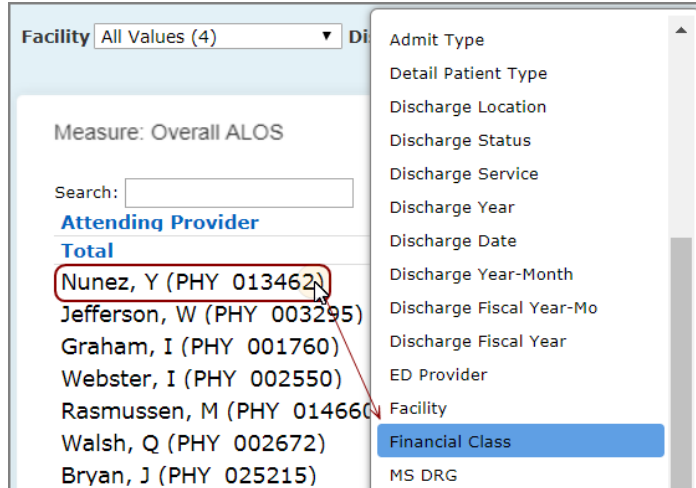
3. To view data for a different dimension, click the leftmost column header, and select a new dimension.



The page refreshes with the new dimension replacing the previous one.

4. Find the dimension value that you want to dive on.
 - If searching is enabled, enter the name of the dimension value in the **Search** box.

NOTE: When you search for a value, the **Totals** row displays the total for all dimension values, not just the value that you searched for.
 - To sort the dimension values in descending or ascending alphabetical order, click the leftmost column header, and select **Sort Up** or **Sort Down** at the top of the context menu.
 - To sort column data in descending or ascending numeric order, click the column header.
5. To begin diving, click the dimension value that you are want to see details about, and then in the context menu, select the dimension that you want to dive on.



The page refreshes to show values that meet the criteria for both dimensions.

In the upper left, the name of the dimension value that you dived on appears.

Nunez, Y (PHY 013462)	Overall ALOS
Financial Class	
Total	22.91
Aetna	30.71
Blue Cross	25.82
Champus	50.00
Charity	10.00

The values that appear in the **Totals row** are the same as the values in the row that you dived on.

Attending Provider	Overall ALOS	Exp ALOS	+/-
Total	4.35	4.4	-0.1
Nunez, Y (PHY 013462)	22.91	8.0	14.9
Jefferson, W (PHY 003295)	18.50	2.2	16.3
Graham, I (PHY 001760)	18.00	8.0	10.1

Nunez, Y (PHY 013462)	Overall ALOS	Exp ALOS	+/-
Financial Class			
Total	22.91	8.0	14.9
Aetna	30.71	12.8	17.9
Blue Cross	25.82	9.4	16.4
Champus	50.00	1.8	48.2




6. Use the previous steps to continue adjusting your view.
7. To return to a previous view, in the upper left, click a dimension value.

[Nunez, Y \(PHY_013462\)](#) → [Blue Cross](#) → [Female](#)

Discharge Year	Overall ALOS	Exp ALOS	+/-
Total	28.63	9.6	19.0
2013	1.00	3.3	-2.3
2014	71.33	14.8	56.5
2015	4.33	6.6	-2.3

8. To the lower left of the data, you might be able to click an option to view the data in Excel or PDF format, or open the data in ProDiver.

NILES	5.00
HARRISON	2.20
WHEELERSBURG	5.00
ANNA	2.00
MINSTER	13.00
	7.00

 Excel
  PDF
  ProDiver

The Measure Dictionary

The Measure Dictionary is the central place to work with your organization's measures. In the Measure Dictionary, you can view a measure's definition and other details and analyze measure data. Additionally, you might be able to view industry standard specification reports that are associated with a measure, if any are available.

The procedures in this section apply to all Applications.

Viewing Measure Details

1. On the home page, click **Measure Dictionary**.

The **Measure Dictionary** page opens.

2. Click the measure that you want to work with, and select **Measure Overview**.

TIP: You can use your web browser's Find feature (typically, **Ctrl + F**) to search for the measure's name.

The **Measure Overview** page opens.

3. On the left, review the measure's definition and other details.

Label	Description
Definition	A brief description of what the measure represents
Business Logic	A narrative explanation of the measure's logic
Expression	The syntax used to generate the measure: <ul style="list-style-type: none"> • Calculation—An operation used to produce a value • Filter—A specification that determines available values
References	Documentation useful for understanding the origins of a measure's definition and business logic

Label	Description
More Details	<p>Additional details:</p> <ul style="list-style-type: none">• Category—The group that the measure belongs to. The category is useful to DivePort administrators and developers who work with the Measure Factory configuration file.• Good Direction—One of two values (up or down) that tells you whether higher or lower values indicate improvements in performance• View—The date or event that the measure is based on• Data Set—The data structure that supplies the values for the measure

Measure Analysis Options

About Default and Custom Analyses

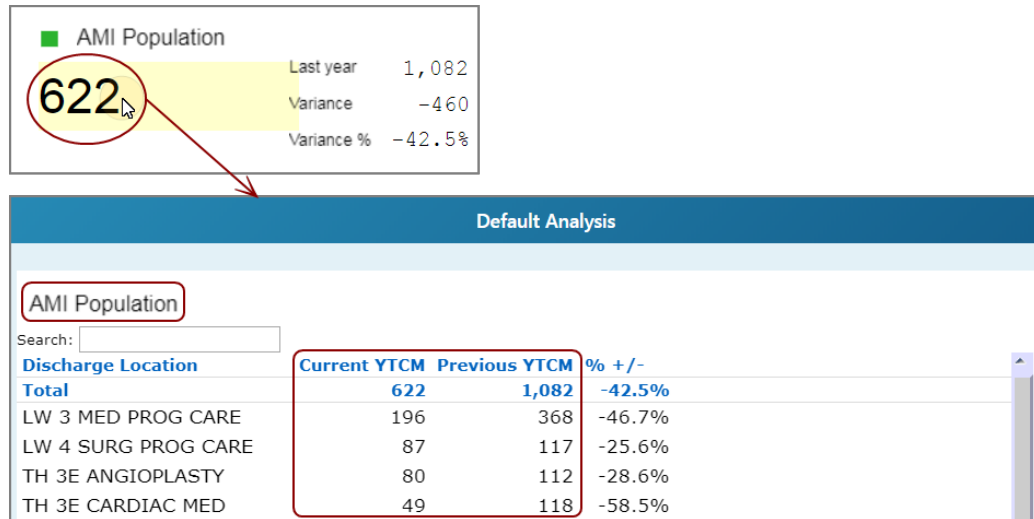
When working with Measure Factory data, there are two distinct types of analysis:

- **Default analysis**—This type of analysis allows you to compare one measure's data between time-periods. You perform a default analysis when you want to understand how one measure's data has changed.

When doing a default analysis:

- You can work with data from only one measure at a time.
- If you choose to view data from the current month-to-date, the values do **not** include data from today.

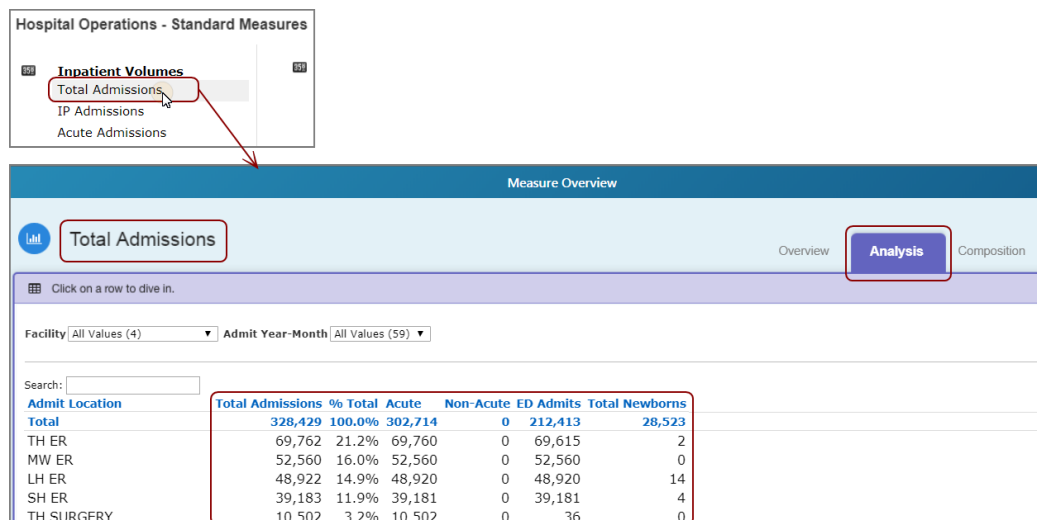
Typically, you start a default analysis by clicking a value—either a number or a graphical value—on a dashboard.



- Custom analysis**—This type of analysis allows you to compare data from several measures, but does not show a time-period comparison. You perform a custom analysis when you want to understand how your organization's most current data differs between related measures, but do not need to know how the data has changed.

When doing a custom analysis, if you choose to view data from the current month-to-date, the values include data from today.

To start a custom analysis, go to the **Measure Overview** page, and click the **Analysis** tab.



Other Analysis Options

Apart from default and custom analysis, each measure has unique data analysis options. These options are specified in Measure Factory, and you can work with your Dimensional Insight consultant or your organization's developers to adjust them.

To view a measure's analysis options:

1. On the home page, click **Measure Dictionary**.

The **Measure Dictionary** page opens.

2. Click the measure whose analysis options you want to view, and select **Measure Overview**.

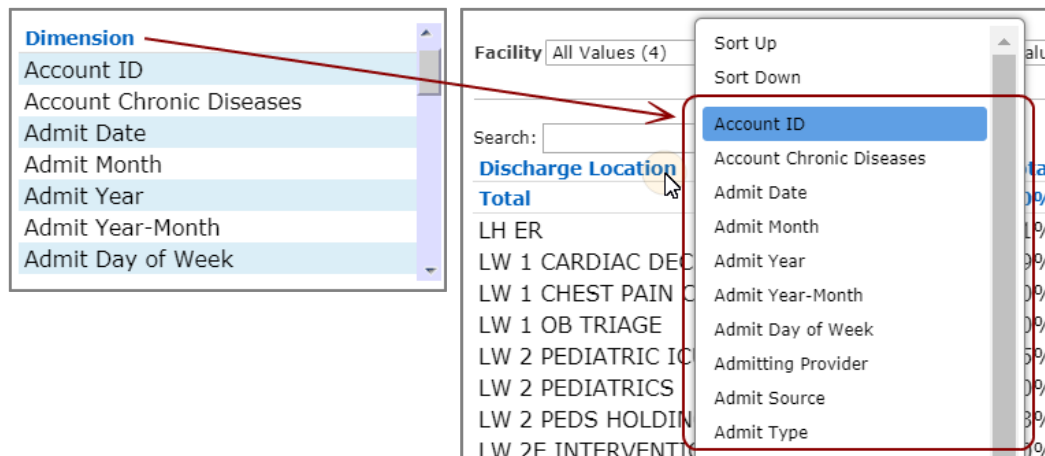
TIP: You can use your web browser's Find feature (typically, **Ctrl + F**) to search for the measure's name.

The **Measure Overview** page opens.

3. In the upper right, click the **Composition** tab.

4. On the left, note the measure's analysis options:

- **Dimension**—This section lists the dimensions that you can choose when doing any type of analysis (either default or custom). When analyzing the selected measure, you can choose only the dimensions that display here.



- **Summary**—This section lists the columns that display on the **Analysis** tab of the **Measure Overview** page. You can view these columns only when doing a custom analysis.

Summary

- % Total
- Acute Discharges

Total Discharges

Click on a row to dive in.

Facility: All Values (4) | Admit Year-Month: All Values (59)

Search:

Discharge Location	Total Discharges	% Total	Acute Discharges
Total	327,547	100.0%	301,871
LH ER	351	.1%	351
LW 1 CARDIAC DECISION	2,845	.9%	2,845
LW 1 CHEST PAIN CTR	30	.0%	30
LW 1 OB TRIAGE	2	.0%	2
LW 2 PEDIATRIC ICU	1,740	.5%	1,739
LW 2 PEDIATRICS	6,697	2.0%	6,692

- **QuickView**—This section lists the pull-down menus that display along the top of the **Analysis** tab of the **Measure Overview** page. You can use these pull-down menus only when doing a custom analysis.

QuickView

- Facility
- Admit Year-Month

Total Discharges

Click on a row to dive in.

Facility: All Values (4) | Admit Year-Month: All Values (59)

Search:

Discharge Location	Total Discharges	% Total	Acute Discharges
Total	327,547	100.0%	301,871
LH ER	351	.1%	351
LW 1 CARDIAC DECISION	2,845	.9%	2,845

Analyzing Measure Data

Analyzing Measure Data Over Time (Default Analysis)

1. On the home page, click **Measure Dictionary**.
The **Measure Dictionary** page opens.
2. Click the measure with the data that you want to analyze, and select **Measure Overview**.

TIP: You can use your web browser's Find feature (typically, **Ctrl + F**) to search for the measure's name.

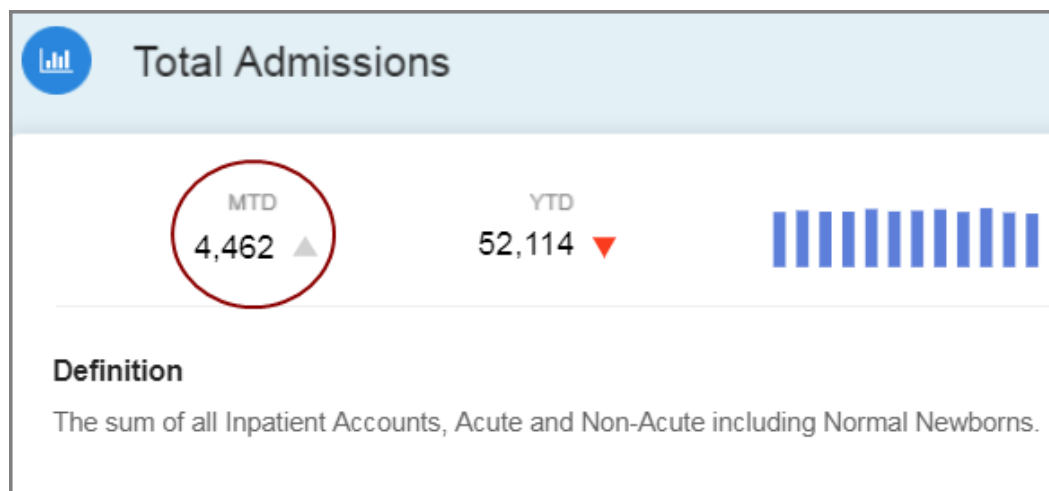
The **Measure Overview** page opens.

3. Choose the data that you want to analyze:

Data from the current month-to-date, compared to the same time-period last year

- a. Above the measure definition, click the **MTD** value.

NOTE: This value does **not** include data from today. To work with data from the current month-to-date, including today's data, perform a custom analysis.



The **Default Analysis** page opens.

- b. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

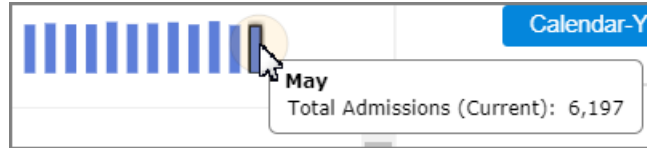
TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Data from a selected month, compared to the same month last year

- a. In the bar chart, click the month with the data you want to analyze.

The most recent completed month displays on the right side of the chart. For example, if this month is June, the rightmost column shows data for May.

TIP: Point to a value in the chart to see labels and number values.



The **Default Analysis** page opens.

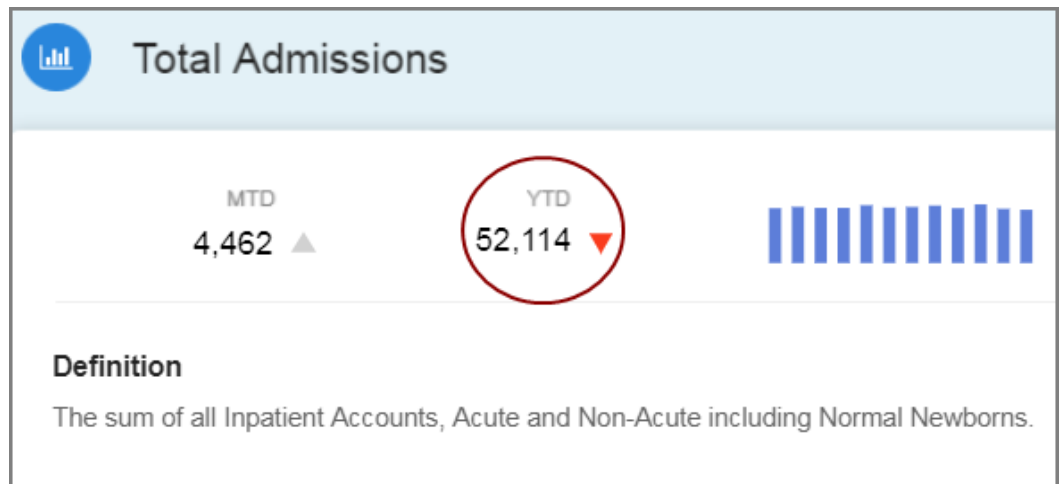
- b. Note the date range:
 - The **Current** column shows data from the selected month.
 - The **Previous** column shows data from the same month, one year in the past.
- c. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Data from the current year-to-completed-month (YTCM), compared to the same time-period last year

NOTE: The year-to-completed-month (YTCM) begins with the first day of the selected calendar (either standard or fiscal) and ends with the last day of the most recent completed month. For example, if the current month is June, the year-to-completed-month begins with January 1st (on a standard calendar), and ends with May 31st.

- a. Above the measure definition, click the **YTD** value.



The **Default Analysis** page opens.

- b. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

NOTE: On dashboards that display the selected measure, you might be able to analyze data from time-periods other than the ones listed here.

Analyzing Measure Data, Without a Time-Period Comparison (Custom Analysis)

1. On the home page, click **Measure Dictionary**.

The **Measure Dictionary** page opens.

2. Click the measure with the data that you want to analyze, and select **Measure Overview**.

TIP: You can use your web browser's Find feature (typically, **Ctrl+F**) to search for the measure's name.

The **Measure Overview** page opens.

3. In the upper right, click the **Analysis** tab.

The measure displays as a column. Dimension values display in the leftmost column.

Admit Location	Total Admissions	% Total	Acute
Total	328,429	100.0%	302,714
TH ER	69,762	21.2%	69,760
MW ER	52,560	16.0%	52,560
LH ER	48,922	14.9%	48,920
SH ER	39,183	11.9%	39,181
LW 1 OB ED	867	.3%	867

4. Along the top of the page, you can use the pull-down menus to adjust your

view.

NOTE: If you choose to view data from the current month-to-date, the values include data from today.

5. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format, or in ProDiver.

Opening Measure Data in ProDiver

If you have access to ProDiver, you can open a measure's data as a marker file. This option is useful when you want to perform a complex analysis or save your view.

1. On the home page, click **Measure Dictionary**.

The **Measure Dictionary** page opens.

2. Click the measure that you want to analyze, and select **ProDiver**.

TIP: You can use your web browser's Find feature (typically, **Ctrl+F**) to search for the measure's name.

The downloads area for your web browser displays.

3. Follow your web browser's prompts to open the file.

ProDiver starts.

4. If prompted, enter your logon credentials.

The measure data opens in ProDiver.

The measure displays as a column. Dimension values display in the leftmost column.

The screenshot shows the ProDiver application window. At the top, there are menu options (File, Edit, Organize, Display, Window, Help) and a toolbar. Below the toolbar, there are two pull-down menus: 'Facility' set to 'All Values (4)' and 'Admit Year-Month' set to 'All Values (27)'. The main area contains a table with the following data:

Admit Location	Total Admissions	% Total	Acute	Non-Acute	ED Admits	Total Newborns
Totals	13,102	100.0%	12,052	0	6,636	1,189
<unknown>	10	.1%	10	0	3	6
CER	2,045	15.6%	2,045	0	2,045	0
GC IR	8	.1%	8	0	1	0
GER	2,498	19.1%	2,498	0	2,498	0
HER	2,128	16.2%	2,128	0	2,128	1
LER	1,859	14.2%	1,859	0	1,859	0
LW 1 CARDIAC DECISION	3	.0%	3	0	0	0
LW 1 DIRECT ADMIT UNIT	3	.0%	3	0	0	0
LW 1 OB ED	63	.5%	63	0	63	0
LW 1 OB TRIAGE	283	2.2%	283	0	3	0
LW 2 PEDIATRIC ICU	19	.1%	19	0	0	0
LW 2 PEDIATRICS	81	.6%	80	0	0	1
LW 2 PEDS HOLDING	8	.1%	8	0	0	0
LW 2E INTERVENTIONAL	1	.0%	1	0	0	0
LW 2S NURSERY	1	.0%	0	0	0	1
LW 2S OB SPECIAL CARE	18	.1%	18	0	0	0
LW 3 BIRTHDAY SUITE A	205	1.6%	205	0	3	0
LW 3 BS A NURSERY	342	2.6%	19	0	0	342
LW 3 MED PROG CARE	44	.3%	44	0	3	0
LW 3 MEDICAL ICU	6	.0%	6	0	1	0
LW 3 NEONATAL ICU	89	.7%	84	0	0	89
LW 3 PEDS SEDATION	1	.0%	1	0	0	0
LW 4 BS B NURSERY	1	.0%	0	0	0	1
LW 4 OPEN HEART ICU	5	.0%	5	0	1	0

At the bottom of the table, it says '94 Rows (Totals-25)'. On the right side, there is a 'Console' panel with a tree view showing a hierarchy: 'History(Admissions - Total Admissions)' > 'Admit Location' > 'cBases' > 'Admissions - Total Admissions'. Under 'Admissions - Total Admissions', there are various categories like Patient, Account, Admission, Discharge, Clinical, Outcomes, Financial, Providers, Dates-Times, Census, Charge, ED, Surgery, Other, Rules, and Other Dimensions. At the bottom of the console, there is an 'Info' icon. The status bar at the bottom right says 'Logged in as dj_nickerson (healthaware)'.

- Along the top, you can use the pull-down menus to adjust your view.
NOTE: If you choose to view data from the current month-to-date, the values include data from today.
- Dive on the data.
 For more information about the ProDiver tool, see the *ProDiver Help*.

Self Service Functionality

The Self Service functionality allows you to easily create a personal and customizable page using the Measures and filters of your choice.

IMPORTANT: You must create your personal page before adding content.

Creating Your Page

1. On the home page, click **Self Service**.

The **Self Service** page opens.

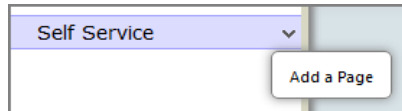
2. Click the SideBar icon, .

The SideBar opens.

3. Hover over the **Self Service** page in the navigation list.

4. Click the down arrow.

The menu opens.



5. Click **Add a Page** from the context menu.

The **Add Page** dialog box opens.

6. Enter a page name. Dimensional Insight recommends the convention "<Your Name> My Page."


7. Click **OK**.

The new page opens.

Adding Stamps

1. On the home page, click **Self Service**.

<Your Name> **My Page** opens.

2. On the right, click the **Edit**, , button.

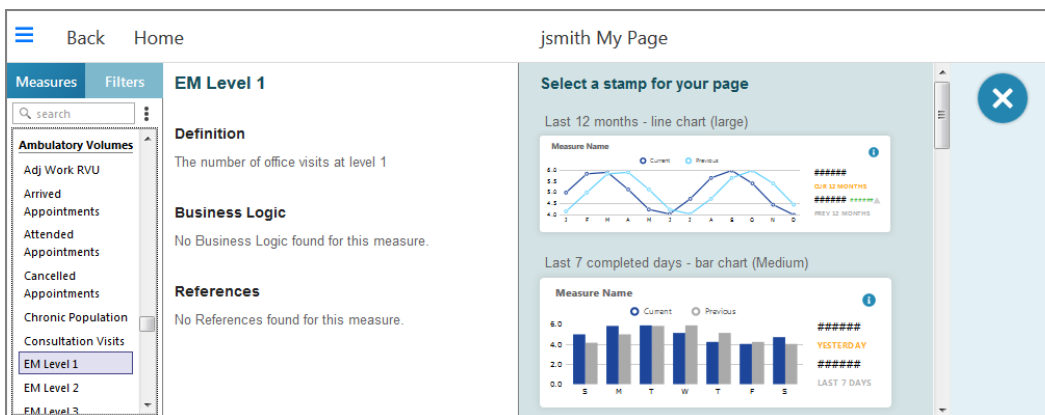
The **Measures** and **Filters** tabs appear on the left, and editing options appear on the right.



3. Select the measure you want to use.

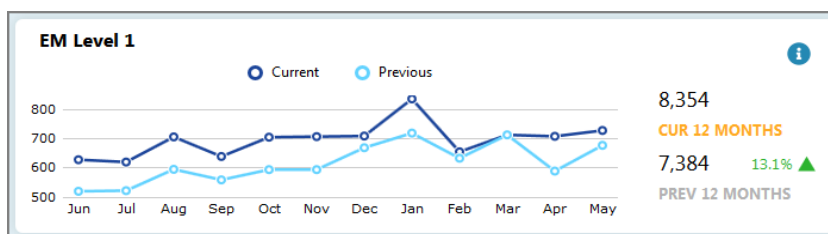
TIP: Use the search box to search for the measure name.

The **Definition**, **Business Logic**, and **References** measure information opens on the right.

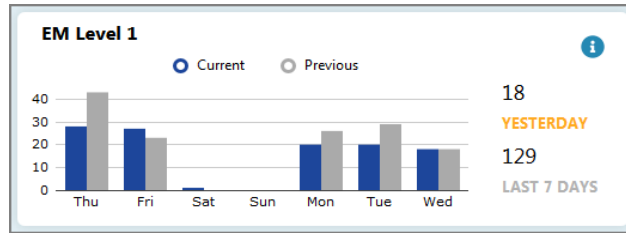


4. Select a stamp type to use. There are seven types to choose from:

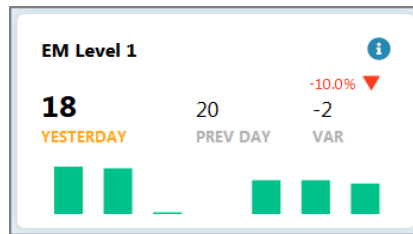
- **Last 12 months - line chart (large)**—This stamp is a line chart that shows information for the current and previous rolling 12 months.



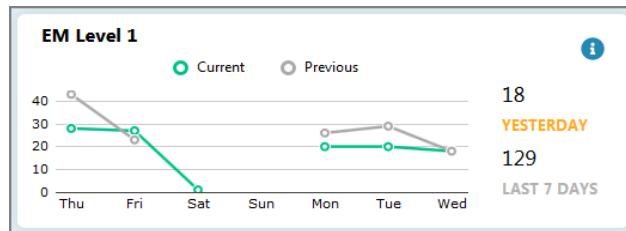
- Last 7 completed days - bar chart (Medium)**—This stamp is a bar chart that shows information for the last 7 completed days and the previous week, with values comparing yesterday and the previous week.



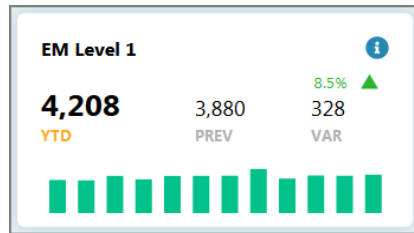
- Last 7 completed days - bar chart (Small)**—This stamp is a bar chart that shows information for the last 7 completed days, with values comparing yesterday and the previous day.



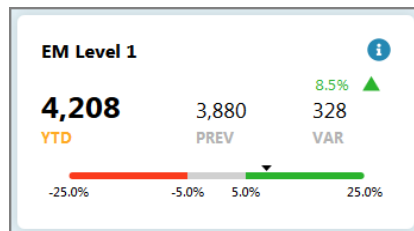
- Last 7 completed days - line chart (Medium)**—This stamp is a line chart that shows information for the last 7 completed days and the previous week, with values comparing yesterday and the previous week.



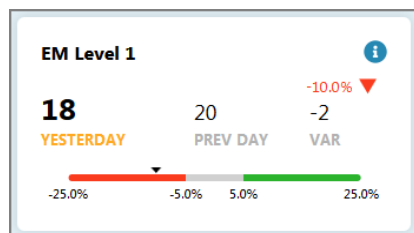
- Year-to-Date - bar chart (Small)**—This stamp is a bar chart that shows information for the current rolling 12 months, with values comparing the current and previous year-to-date.



- **Year-to-Date - slider chart (Small)**—This stamp is a slider chart that shows the percent difference between the current and previous year-to-date, with values comparing those time-periods.

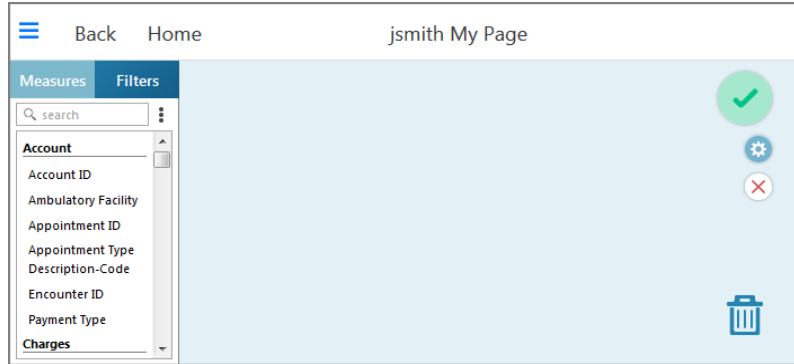


- **Yesterday - slider chart (Small)**—This stamp is a slider chart that shows the percent difference between yesterday and the day before yesterday, with values comparing those time-periods.

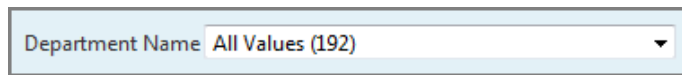




The stamp is added to the page.

5. On the left, select the **Filters** tab.







6. Select a dimension to use as a filter.
The filter is added as a pull-down menu on the top of the page.



7. Do one of the following:
 - Click **OK** and the green check, , icon to save your changes.
 - Click the red X icon, , to discard your changes.

Deleting Stamps

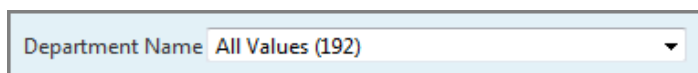
1. On the home page, click **Self Service**.
<Your Name> **My Page** opens.
2. On the right, click the **Edit**, , button.
The **Measures** and **Filters** tabs appear on the left, and editing options appear on the right.
3. Click, hold, and drag the stamp to the trash can icon. .
The stamp is deleted.
4. Do one of the following:
 - Click **OK** and the green check, , icon to save your changes.
 - Click the red X icon, , to discard your changes.

Using Stamps

Go to the dashboard and adjust your view

1. On the home page, click **Self Service**.
<Your Name> **My Page** opens.
2. In the pull-down menu or menus, choose whether to view data for one or all values.

Here is an example of a pull-down menu.



NOTE: The presence of pull-down menus depends on how you configure your page.

Review the data

There are seven different stamps that analyze four groups of time-period information:

- **Current 12 Months** shows data for the current and previous rolling 12 months.
- **Last 7 Days** shows data for yesterday compared to the last complete 7 days.
- **Year-to-Date** shows data for the current and previous year-to-date.
- **Yesterday** shows data for yesterday compared to the previous day.

Analyze the data

Choose the data that you want to analyze:

Chart Data

IMPORTANT: This does not apply to stamps that use slide charts.

1. Click a chart value.

The **Analysis** window opens.

- The **Current** column shows data from the selected current time-period.
- The **Previous** column shows data from the previous time-period.
- The **% +/-** column shows the percent difference between the current and previous columns.

NOTE: For stamps using bar and line charts, the current, previous, or variant value shows values for the primary time-period for the stamp.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Current and Previous Data

1. Click the current, previous, or variant value.

The **Analysis** window opens.

- The **Current <Time Period>** column shows data from the current time-period.
- The **Previous <Time Period>** column shows data from the previous time-period.
- The **% +/-** column shows the percent difference between the current and previous columns.

NOTE: The chart value shows values for the selected time-period. For example, **Current 12 Months**, shows the total for the rolling 12 months, while selecting **Sep** shows the values for the month of September.

2. Dive on the data. For more information, see [Diving on a Tabular Display on page 53](#).

TIP: In the lower left of the window, you can click an option to open the data in Excel or PDF format.

Measure Overview

1. Click the information icon, , on the top right of the stamp.

The **Measure Overview** window opens.

2. Review the measure information. This includes:

- **Definition**
- **Business Logic**
- **Expression**
- **References**
- **More Details**

For more information, see [Viewing Measure Details on page 57](#).