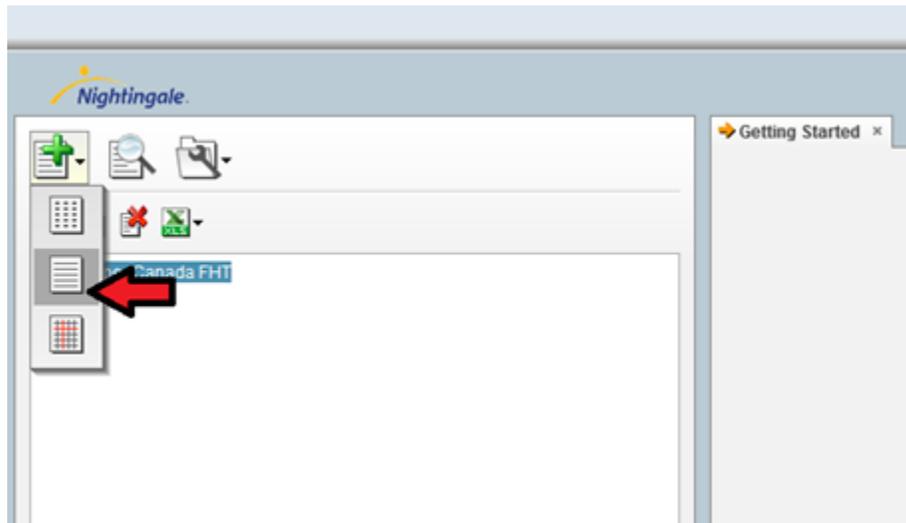


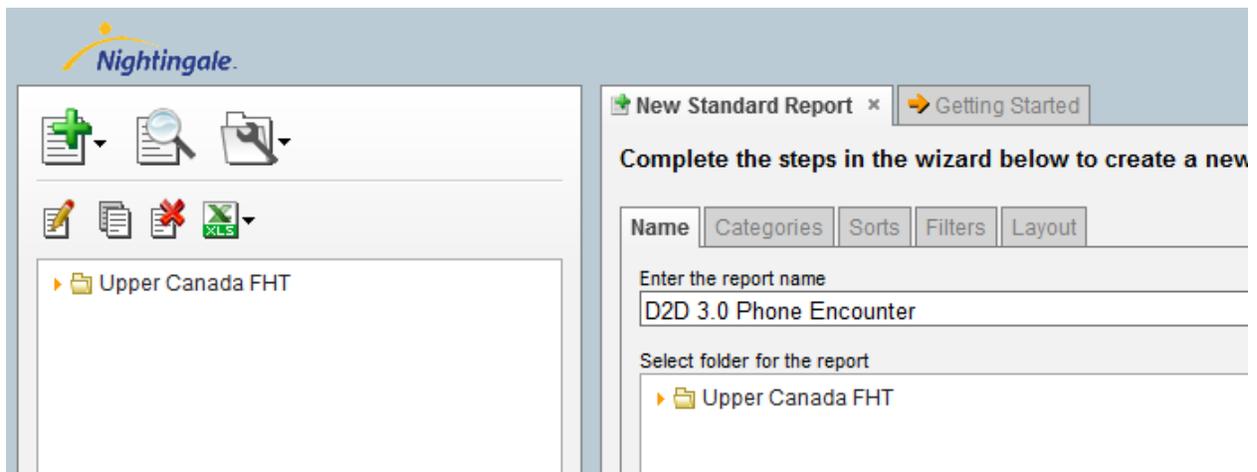
## Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

**AFHTO D2D 4.0 Specific Measurement (Step 1): Number of Phone Encounters within the past 12 months for all members of Team (Physicians, NPs, IHPs, office nurse and/or admin). Remove any phone encounters for providers/users documenting from outside Team**

In Data Miner Module create new Standard Report



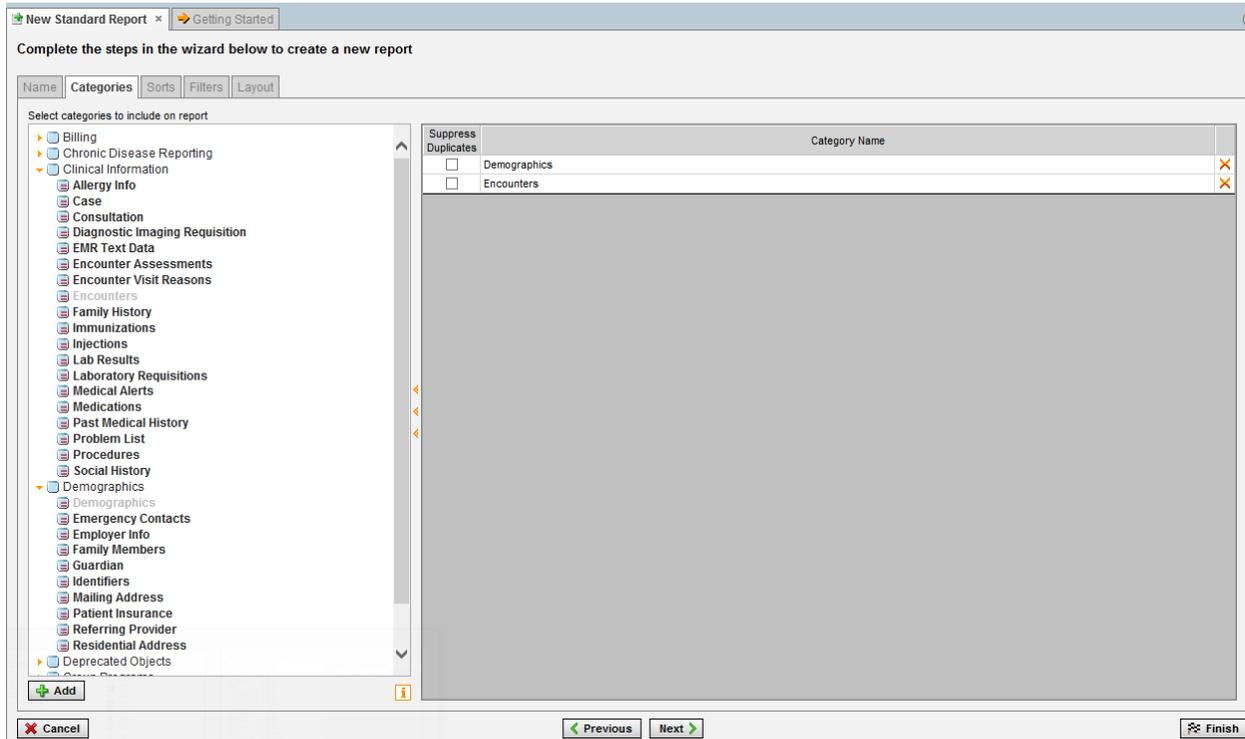
Name your report and file it in required folder and then click Next:



# Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

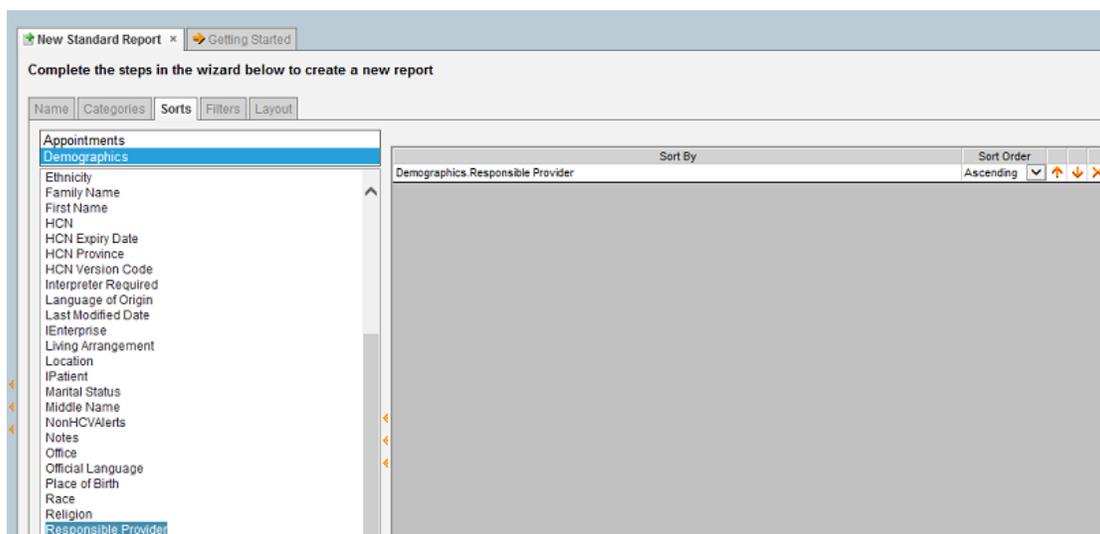
**Categories:** Select (double click or drag and drop the category) and then click Next:

- Demographics → Demographics
- Clinical Information → Encounters



**Sort:** Can sort based on any parameter, in this example we used “Responsible Provider”. Select your sort parameter and then click Next.

**NOTE:** We selected Responsible Provider as the sort because we typically review our data per provider and for the entire group. This is an internal practice for Upper Canada FHT and not necessary for D2D.



# Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

## Filters:

1. Select Encounters from the drop down and then either double click or drag and drop Encounter Date into “Filter By” area.

In the filter details below;

- Change the first drop down to “Is Between”
- Then click on the calendar beside the first date box and select the appropriate start date (oldest date)
- Then click on the calendar beside the second date box and select the appropriate end date (most recent date)

**TIP:** Ensure that the Summary box at the bottom reflects the dates that you have selected. Sometimes when changing the date you need to click in the date box area to “force” the change in the Summary.

**TIP:** If running this report regularly for different date ranges put a check in the “Prompt for Value” so that you don’t have to go back into the filters to make changes. When you run the report, it will prompt you to enter the date ranges you want.

The screenshot shows the 'Filters' step of a report wizard. On the left, a list of fields is available for selection, with 'Encounter Date' highlighted. On the right, the 'Filter By' area contains one filter: 'Encounters.Encounter Date'. Below this, the filter details are shown: the operator is 'Is Between', the start date is '2015-01-01', and the end date is '2015-12-31'. The 'Prompt For Value' checkbox is checked. At the bottom, a 'SUMMARY' box displays the resulting filter: 'Encounters.Encounter Date Is Between '2015-01-01' And '2015-12-31''.

2. Select Encounters from the drop down and then either double click or drag and drop Encounter Type into “Filter By” area.

In the filter details below;

- Change the first drop down to “Equal To”
- Then type “Phone” or select phone from the drop down menu

# Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

**TIP:** Ensure that the Summary box at the bottom reflects the dates that you have selected. Sometimes when changing the date you need to click in the date box area to “force” the change in the Summary.

Complete the steps in the wizard below to create a new report

Name Categories Sorts **Filters** Layout

Select filter fields to include on report

Encounters

- Case
- CaseID
- Co-signed by First Name
- Co-signed by Last Name
- Co-signed By User ID
- Created By First Name
- Created By Last Name
- Created By User ID
- Date Co-signed
- Date Created
- Date of Encounter
- Date Signed Off
- Encounter Date
- Encounter ID
- Encounter Time
- Encounter Type
- Fee Code
- FTE
- IEnterprise
- IID
- IPatient
- Main Diagnosis Code
- Main Diagnosis Description
- Office
- Office ID
- Physician First Name
- Physician Last Name
- Plan Notes
- Sign Off By User ID
- Signed Off By First Name
- Signed Off By Last Name

Filter By

Encounters.Encounter Date			
Encounters.Encounter Type			

Equal To Phone

AND With Next Filter

Group With Next Filter

Prompt For Value

**ADD**

**SUMMARY**  
Encounters.Encounter Date Is Between '2015-01-01' And '2015-12-31' And Encounters.Encounter Type = 'Phone'

Cancel Previous Next Finish

**Layout:** Click the drop down (see red arrow below) and select the required category. Either double click or drag and drop the required output fields. For this search we selected the following:

- Demographics
  - Chart Number
  - Chart Status
  - HCN
  - Family Name
  - First Name
  - Responsible Provider
- Encounters
  - Encounter Date
  - Encounter Type
  - Signed Off by Last Name

Once you have selected all of your outputs click Finish in the bottom right corner

# Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

New Standard Report x Getting Started

Complete the steps in the wizard below to create a new report

Name Categories Sorts Filters Layout

Select fields to include on report

Encounters

- FTE
- IEnterprise
- IID
- IPatient
- Main Diagnosis Code
- Main Diagnosis Description
- Office
- Office ID
- Physician First Name
- Physician Last Name
- Plan Notes
- Sign Off By User ID
- Signed Off By First Name
- Signed Off By Last Name
- Signed Off By Provider Type
- Subjective
- Visit Type

Demographics.Chart Status  
Demographics.Chart Number  
Demographics.HCN  
Demographics.Family Name  
Demographics.First Name  
Demographics.Responsible Provider  
Encounters.Encounter Date  
Encounters.Encounter Type  
Encounters.Signed Off By Last Name

Summary Function  
f None  
f None

Summarize By  
 Demographics

Page Header  Page Footer  Grand Total

Preview

D2D 3.0 Phone Encounters								
Chart Status	Chart Number	HCN	Family Name	First Name	Responsible Provider	Encounter Date	Encounter Type	Signed Off By Last Name
Chart Status 1	Chart Number 1	HCN 1	Family Name 1	First Name 1	Responsible Provider 1	Encounter Date 1	Encounter Type 1	Signed Off By Last Name 1
Chart Status 1	Chart Number 1	HCN 1	Family Name 1	First Name 1	Responsible Provider 1	Encounter Date 2	Encounter Type 2	Signed Off By Last Name 2
Chart Status 2	Chart Number 2	HCN 2	Family Name 2	First Name 2	Responsible Provider 2	Encounter Date 3	Encounter Type 3	Signed Off By Last Name 3
Chart Status 2	Chart Number 2	HCN 2	Family Name 2	First Name 2	Responsible Provider 2	Encounter Date 4	Encounter Type 4	Signed Off By Last Name 4

Cancel Previous Next Finish

## Additional Settings and Functions:

Click the Drop down on the Report Options icon  and select Advanced.

D2D 3.0 Patient Served Indicator (Screen Shots) x Getting Started

Appointments

- Appointment Date
- Appointment End time
- Appointment Priority
- Appointment Status
- Appointment Time
- Appointment Type
- Booked By
- Booked On
- Checked In At
- Checked In At Time
- Checked Out At
- Checked Out At Time
- Comment
- Duration
- IEnterprise
- IID
- IPatient
- New Patient
- Patient Family Name
- Patient First Name
- Reason For Visit
- Schedule Name

Rename  
Description  
Categories  
Sorts  
Filters  
Options  
Template  
Advanced

D2D 3.0 Patient Served Indicator (Screen Shots)					
	Chart Number	Chart Status	Responsible Provider	Appointment Date	Appointment Status
1	Demographics.Chart Number	Demographics.Chart Status	Demographics.Responsible Provider	Appointments.Appointment Date	Appointments.Appointment Status

If there are any ticks in either of the boxes below, remove (ensure both boxes are unticked) and then click OK.

## Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

**Advanced**

Select options below

Advanced Options

In addition to Demographics data that has matching Encounters data, include:

Demographics data that does not have Encounters data

Encounters data that does not have Demographics data

Add Recreate

OK Cancel

Click the Drop down on the Report options icon  and select Options

Change the Default Export Type to “Excel” and Include Setup Info to “Top” and then click OK

**TIP:** If you want the Export Type in something other than Excel either leave this option blank or select the appropriate type (Options are HTML, XLS, RTF and CSV).

**Report Options**

**General Options**

Default Export Type: Excel Include Setup Info: Top

Allowed Export Types:  HTML  Excel  PDF  RTF  CSV

Always Show Filters on Execution

**HTML Options**

Show Grid  Simulate PDF

**Excel Options**

Suppress Formatting

**Page Options**

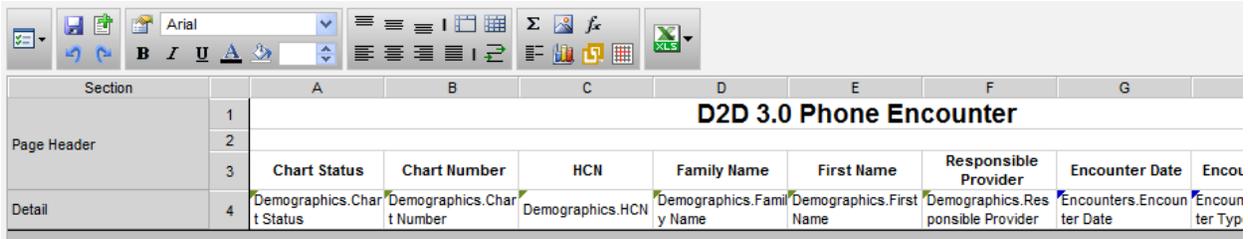
Page Size: Letter Page Orientation: Portrait

Fit to Page Width

OK Cancel

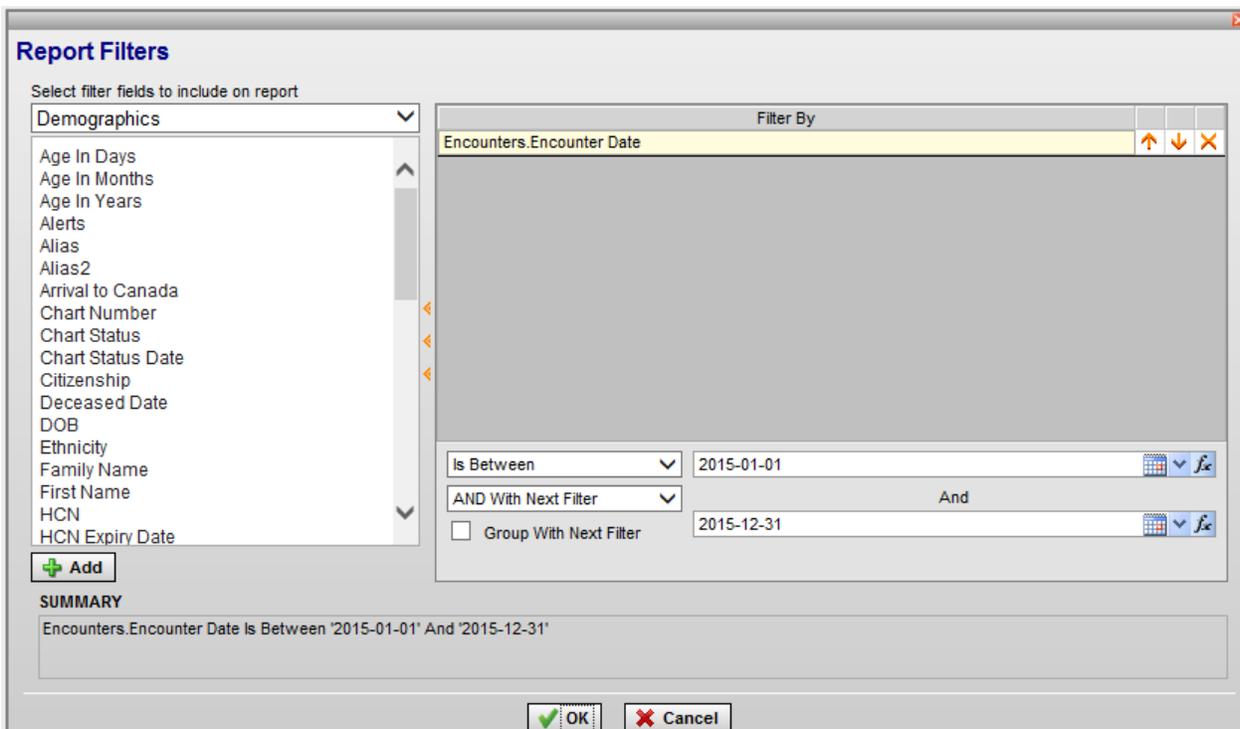
# Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

Click the Save icon  to save the report. When complete click the Excel icon  to run the report.



Section	A	B	C	D	E	F	G	H	
Page Header	1	<b>D2D 3.0 Phone Encounter</b>							
	2								
	3	<b>Chart Status</b>	<b>Chart Number</b>	<b>HCN</b>	<b>Family Name</b>	<b>First Name</b>	<b>Responsible Provider</b>	<b>Encounter Date</b>	<b>Encou</b>
Detail	4	Demographics.Char t Status	Demographics.Char t Number	Demographics.HCN	Demographics.Famil y Name	Demographics.First Name	Demographics.Res ponsible Provider	Encounters.Encoun ter Date	Encoun ter Typ

The Report filters that were set to “Prompt for Value” will pop up. Update date range appropriately and click OK.



**Report Filters**

Select filter fields to include on report

Demographics

- Age In Days
- Age In Months
- Age In Years
- Alerts
- Alias
- Alias2
- Arrival to Canada
- Chart Number
- Chart Status
- Chart Status Date
- Citizenship
- Deceased Date
- DOB
- Ethnicity
- Family Name
- First Name
- HCN
- HCN Expiry Date

**Filter By**

Encounters.Encounter Date

Is Between 2015-01-01 And 2015-12-31

AND With Next Filter

Group With Next Filter

**SUMMARY**

Encounters.Encounter Date Is Between '2015-01-01' And '2015-12-31'

OK Cancel

Depending on this size of your database the report may take a few minutes to process. Once the report is done there will be a prompt to Open or Save, click Open. The report will open in Microsoft Excel.

Do you want to open or save D2D\_3.0\_Phone\_Encounter.xls (420 KB) from ont.nightingale.md? Open Save Cancel

Report in Microsoft Excel:

- Verify the Setup Information is accurate.
- Delete the Setup information if not needed (or move to another sheet for reference).

## Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

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### Upper Canada FHT Filters:

- Chart Status
  - Remove any entries for the following Chart Statuses (if applicable):
    - Billing Only
    - OST
    - Test
- Signed Off By Last Name
  - Remove any entries for users that are NOT a part of the FHT (if applicable)

**NOTE:** Items to remove will be specific to each organization. There are other features and functions within Data Miner to filter out Encounters and Chart Status however in our experience the less you try to ask the report to do the less likely it is to fail. We find it easier to manipulate the data in Microsoft Excel.

The number left should reflect the number of phone encounters completed within the past 12 months.