Reporting

Reporting Workbench, Clarity, & Dashboards

Important Telephone Numbers and Addresses

UCSF APeX Service Desk	514-4100
APeX Knowledge Bank	http://myapex.ucsf.edu
Remote APeX Access	http://connect.ucsfmedicalcenter.org
E-Learning	http://learningcenter.ucsfmedicalcenter.org

<table>
<tr><td colspan="2">Organization:
UCSF Health</td><td colspan="2">Title/Subject:
Reporting</td><td>Application:
All</td></tr>
<tr><td>Owning Department:
APeX -Training Clinical Systems</td><td colspan="2">Principal Trainer:
Gisselle Rhodes
Tania Walker</td><td>Revision Date:
07/17/19</td><td>EPIC Version:
V2018</td></tr>
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Welcome to APeX, UCSF Health electronic medical record. This guide walks you through the highlights of APeX Reporting.

APEX (EPIC) USER RESPONSIBILITIES

- APeX contains the legal electronic health record for patients at UCSF Health and affiliate providers. All users must:
  - Assure that information is entered correctly and accurately and within the scope of roles and responsibilities
  - Stay up to date on changes in APeX
  - Follow all UCSF Health and Departmental Policies and Procedures on use of the electronic health record
  - Report any issues or problems to your leadership team and/or call 514-APEX

Learning Objectives

- Access **My Reports** workspace
- Search and filter reports
- Save reports as **Favorites**
- Run the reports
- Understand the difference between **Workbench** and **Crystal** Reports
- Access **My Dashboard**

Log in to APeX

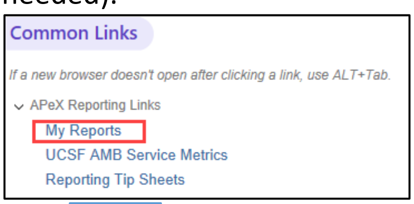
1. Click Window icon

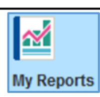
2. Select appropriate Apex environment
3. Log in with User ID and Password

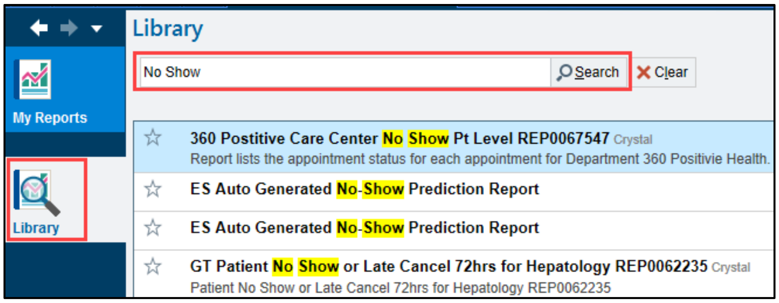
Access My Reports

My Reports provides quick access to your favorite **Reporting Workbench** and **Crystal Reports** and save report results. Here you can view the status of recently run reports, as well as open and view results. Dependent upon the type of report, some reports will allow you to change the criteria of the search, as well as the appearance of the results.

1. Click **Epic**  →**Reports** → **My Reports**
   - Or select **My Reports** link from the **Dashboard** in the **Common Links** section (scroll if needed).

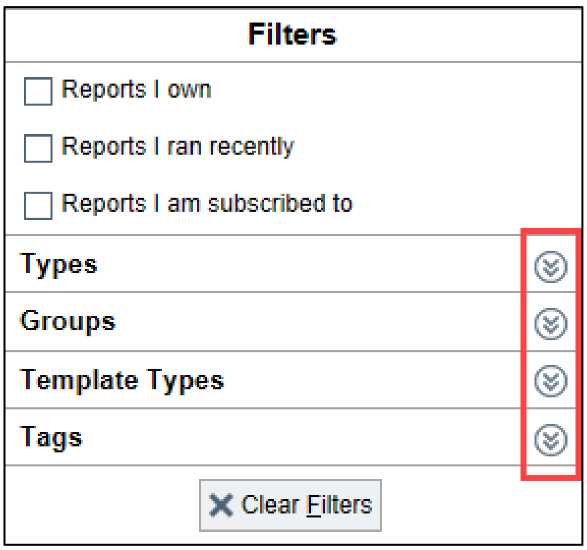
   

2. **My Reports**  tab opens and displays a list of all your favorite reports
3. Click **Library**  to display a list of available reports
   - The reports available to you depend on your security
4. Type in key word(s) in the **Search the library** field, for example *No Show or Patient*



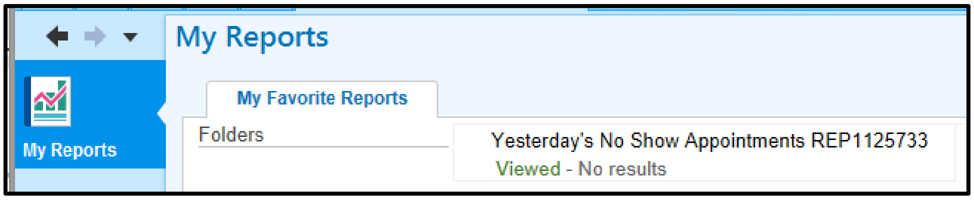
Filters

To limit your search results, select a filter in the Filters option on the right. Select the chevron icon to the right of a category to open it, check the desired option.



Filter Type	Filter Definition
Reports I own or Reports I ran recently	Searches for reports you own or reports recently ran
Types	View all report types, such as by application(s) or department(s)
Groups	View all reports grouped by more granular workflows or users
Template Types	View all template types. Types include Epic-Crystal or Workbench reports
Tags	Allows quick access to the reports needed. Tags are categories that group reports, such as cardiology, registration, and so forth
Clear Filters	Removes the filter

5. Click the **Star** icon to the left of the report name to make it a **Favorite**.
    - Reports selected as Favorites will appear in **My Reports**

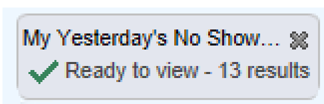


There are two types of reports the system generates; **Workbench** and **Crystal** reports. Depending on the report's template type (workbench or crystal) you will have an option to Run or View.

Workbench Report

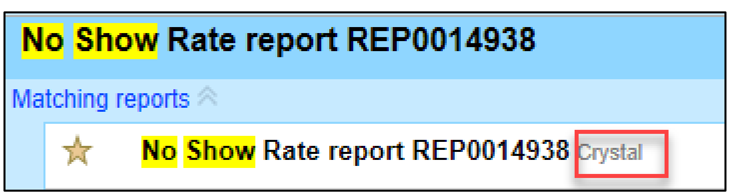
1. Click **Run** 

to display the results of the **Workbench** report with the default settings.
    - After running the report, a screen will appear with the results.
    - At the bottom of the screen, a status indicator appears showing the report name, status, and number of results.



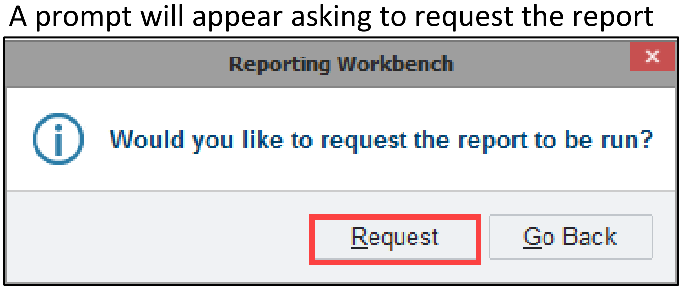
Crystal Report

APeX-Crystal reports are run by batch job on a set schedule. Instead of running a report at any time, you must request the report. Crystal reports are indicated by the label, which also designates their availability.

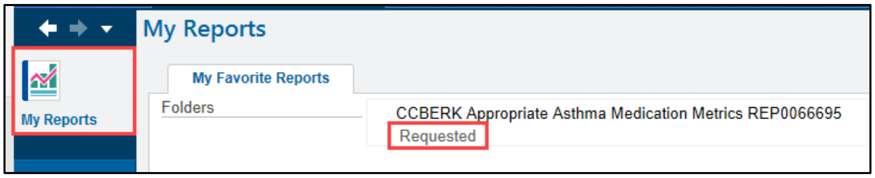


1. Click View 

2. A prompt will appear asking to request the report



3. Click **Request**. This will place the report in the **My Reports** tab

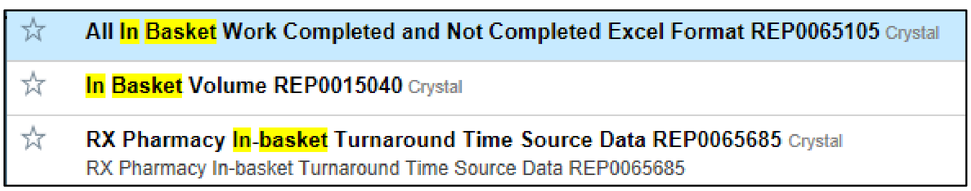


- Click **New report** New report to create a new version of the report
- Click Edit to edit the existing report settings
- You can then run the report with your new settings, or save it as a new report

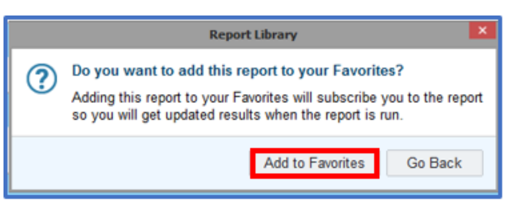
ⓘ	Uncheck the **Show templates** ☑ Show templates checkbox to show only reports in your search results.

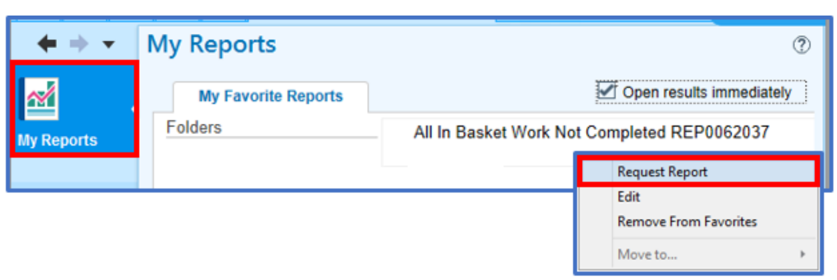
Practice Exercise

1. From the **Library** tab, click **Template Types**
2. Check the **Epic-Crystal** ☑ Epic-Crystal check box to display only Crystal Reports
3. In the **Search the library** field type in a key word, for example *In Basket*
   - The system returns solutions matching the key word (and filter) entered in



4. Click **View**
5. Click **Request**
6. The Report Notification window appears
   - Select **Yes** if you want an email reminder upon report completion, and **No** if not
   - Click the **Remember my choice** check box to prevent the window from populating each time a report is ran
7. Click the **My Reports** tab
8. Find the Crystal report in the list of favorites. Right-click the report name. From the menu, select the **Request Report** option



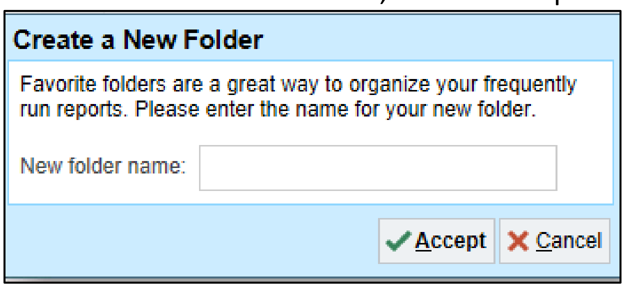


ⓘ	From the **My Reports** tab, **My Favorite Reports**, to remove a report from the favorites, right-click the report name and choose the **Remove From Favorites** option. From the **Library**, the **Star** ☆ icon is a toggle, click the icon to set as a Favorite turning the **Star** gold ★ or clear the setting.

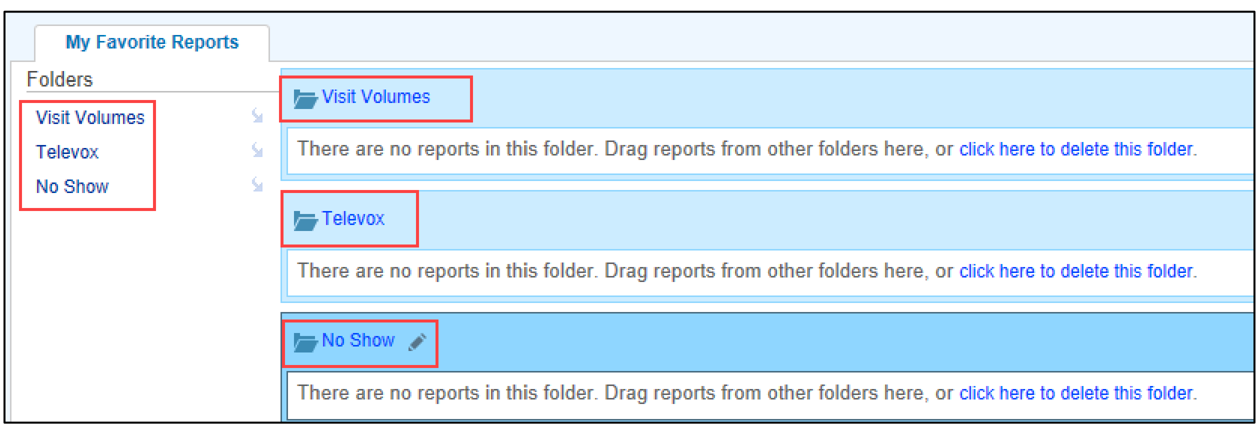
Manage Your Favorites

Selecting the **Star** ☆ icon to add reports as a favorite, once a report is added as a favorite, you can manage reports by creating folders.

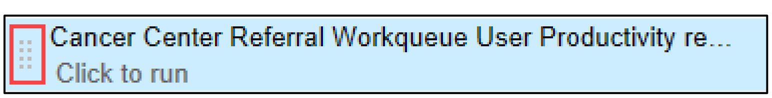
1. **My Reports → My Favorite Reports**
2. Click **+ Create a new folder**
3. In the **New folder name** field, enter in a report name



4. The folder displays in the My Favorites Reports



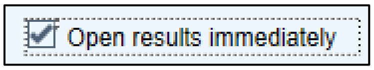
5. Hover the mouse over the **Selection Margin**, to the left of the report name
6. 8 Dots ⋮ appear, as well as a 4 chevron arrow ✥, drag and drop the report into the new folder



7. Click the **Pencil** ✎ icon to rename an existing folder

By default, reports will open immediately after clicking **Click to run**. Some reports may take several seconds to execute; if you run multiple reports simultaneously it may slow down the system.

Uncheck the **Open results immediately** checkbox (upper right) to review the results of the report later.

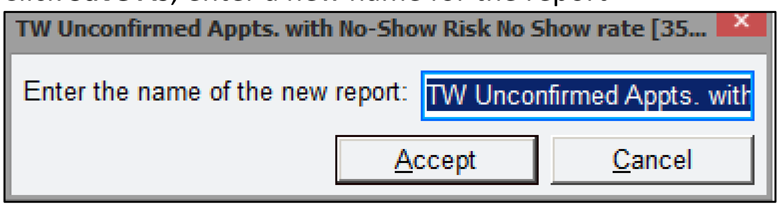


Change Report Criteria

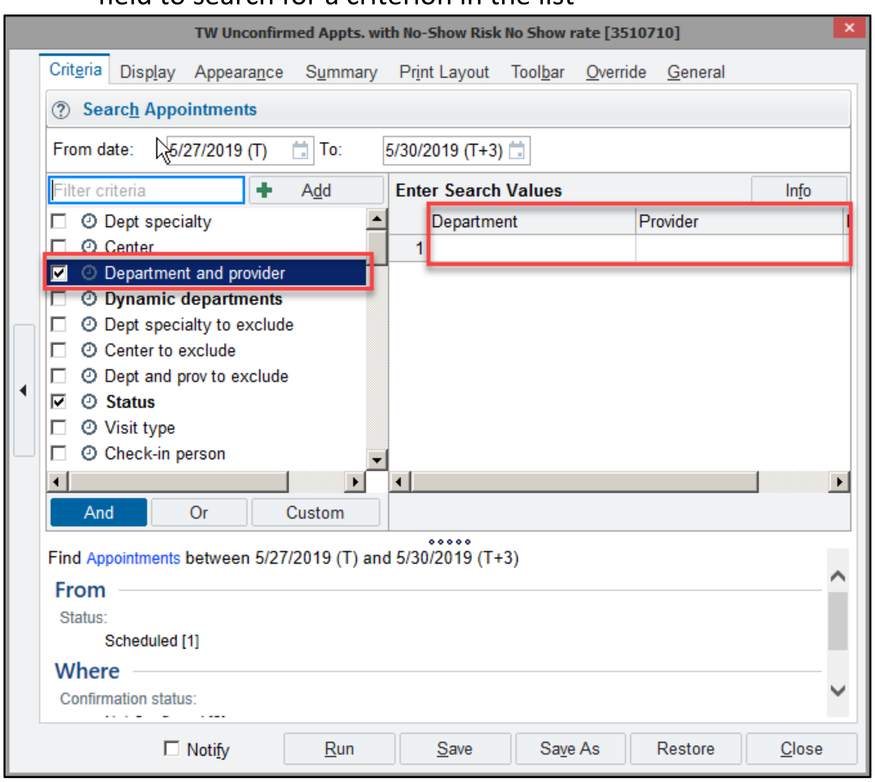
You can change reports that don't quite meet your needs. For example, you might use a report that finds patients with diabetes and high HbA1c results. You can change the report to find all patients with diabetes and high HbA1c results who were seen in your primary department and then save a new version of the report.

Criteria determine what a report searches for and help you target specific patients in your results. The criteria available vary by report. You might want to add criteria to broaden or narrow your search.

1. From the **Library** tab, in the **Search the library** field, search by key word
2. Find the report, click **Edit**
    - The Report Settings window opens to the **Criteria** tab
3. Click **Save As**; enter a new name for the report

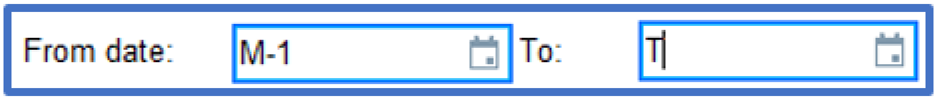


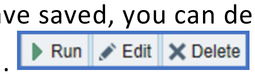
4. Click **Accept**
5. Check and uncheck criteria options
    - The current report criteria are set to report the **Current login department**; we want to specify a specific provider. Uncheck the **Current login department** checkbox
6. Check the **Department and provider** checkbox
    - If a long list of available criteria to choose from displays, enter a keyword in the **Filter criteria** field to search for a criterion in the list



7. In the **Provider and/or department** field enter in the department and Provider**,** press **Enter**
8. Click **Run** to display the results
9. **Report Results** window opens, displaying the results

In some reports, you can set a date range to control the timeframe the report searches. Setting a date range limits the number of results. The date range applies only to criteria that change over time identified by the **Clock** icon. Enter the **From date** and **To** relative values in the field. Certain reports also let you enter a time range. Enter a relative date using one of the following shortcuts: **T=Today**, **W=Week**, **M=Month**, or **Y=Year**. To find a range from 1 month ago through today, type **M-1** in the **From date** field and **T** in the **To** field.



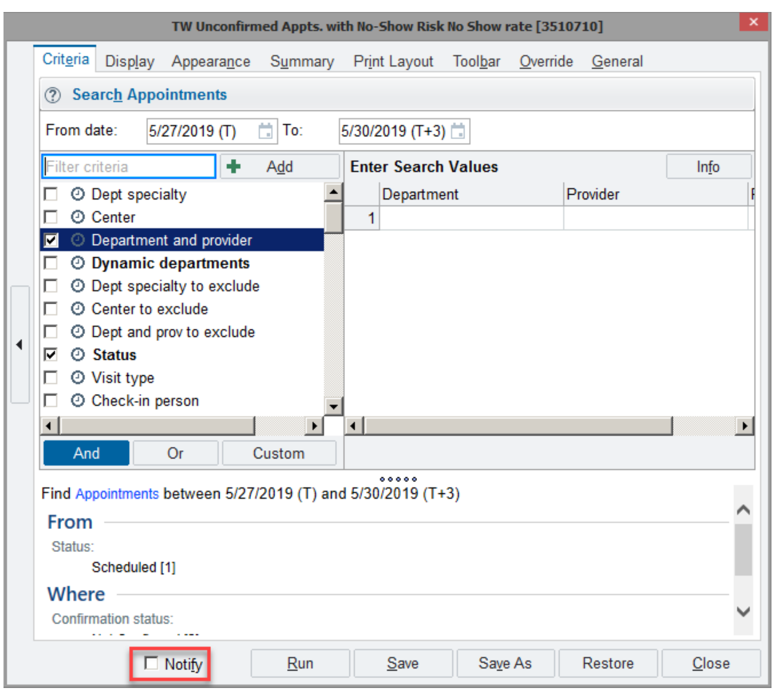
If you no longer need a report you have saved, you can delete the report by clicking the **Delete** button to the right of the **Edit** button. 

This option is only available for reports you have created.

Report Notifications

Reports that gather Reports that gather an extensive amount of data can take longer to run. Before running a report, you can tell the system to send you an In Basket message when the results are ready. By default, results will open immediately. You can instruct APeX to not open each report as they become available by unchecking the **Open results immediately** checkbox.

1. Click **Edit**, open report settings
2. From the Report Settings window, check the **Notify** checkbox
3. The next time the report is run you will receive a message in your **In Basket**



Re-run Reports for Updated Results

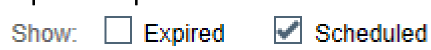
The results of a report contain an expiration period to prevent the same report being requested repeatedly. Such as, when a user double-clicks a report, rather than single-click, this prevents the system from executing the same report multiple times.

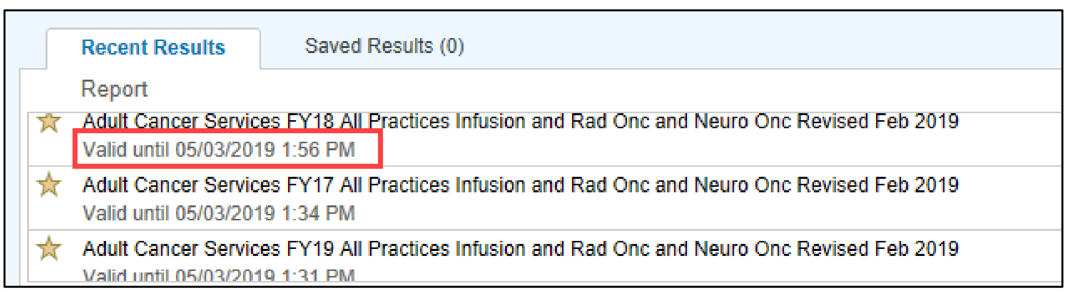
Additionally, timeframes are set based upon the likelihood of the data changing. For example, a report showing female patients overdue for a mammogram, does not differ within one or five minutes of running the report. However, it may differ day- to- day, thus the results will update daily.

By setting these restrictions, it allows for other processes to run more efficiently and not slowing down the system.

You will know when a report is ready to run when:

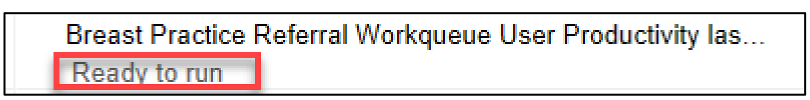
- The **Valid Until** displays the expiration date and time
    - Expired reports will not show unless you check the **Expired** checkbox



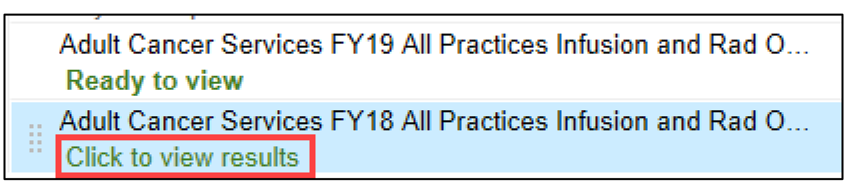


- The status of the report is **Ready to run**

  Hover over **Ready to run** the status changes to **Click to run,** click to run report.



- Click **Ready to view** or **Click to View Results** to display report

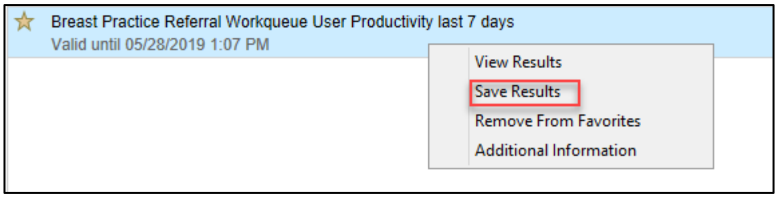


Save Report Results

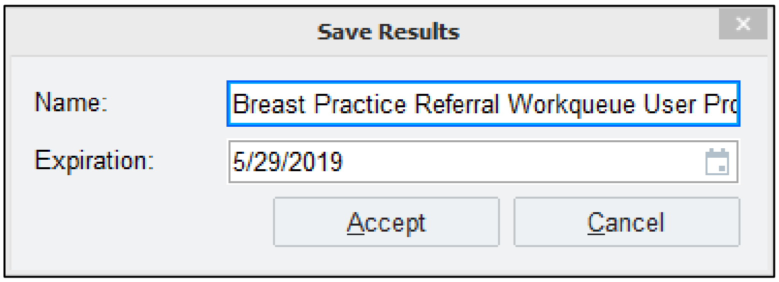
After you run a report, you can save the results if you'll need to review them after they expire.

Saved report results appear in the Saved Results section of My Reports. Saved report results have expiration dates as well, after which their information might no longer be relevant. The next time you open the My Reports workspace, if any saved results have expired, you will receive a prompt asking if you wish to delete or resave the results.

1. After running a report, the results will appear in the **Recent Results** tab on **My Reports**
2. Right-click the report name; click **Save Results**
    - Alternatively, click **Options** from within the report



3. In the **Name** field, enter in a new report name
4. Type an appropriate **Expiration Date**



5. Click **Accept**

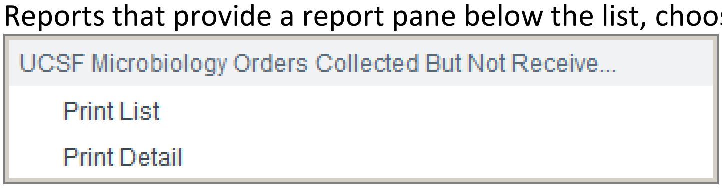
Print Report Results

Occasionally, you might need a printed copy of a report's results. For example, if you need to call patients on a list, you can print the results and check off patients as you complete each call.

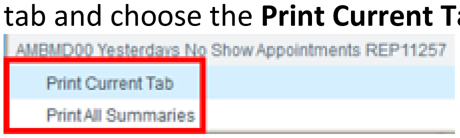
After running a report, the results will appear in the Results screen.

1. Click **Print**  drop-down chevron from the Main Toolbar

2. A list of reports display in the menu; select desired report
    - Dependent upon the results, different options will be available in the drop-down menu
    - Reports that provide a report pane below the list, choose the **Print List** or **Print Details**



    - Reports that provide a list and summary tab, choose the **Print List** or select the **Summary** tab and choose the **Print Current Tab** or **Print All Summaries**



3. The **Reporting Workbench Print** displays
    - Enter Server Printer in the Destination field
    - Select the appropriate printer in the **Printer name** field
4. Select the appropriate view:

View	Description
Current View	This option is only available if you made changes without saving. Selecting the view prints exactly what is on screen.
Print Layout tab from Report Settings	This option prints the layout specified on the Print Layout tab of Report Settings.
Saved Views	Any views you saved are options for print layouts. The default saved view is also the default print view.
Display tab from Report Settings	This option prints the layout specified on the Display tab of Report Settings.

5. Click **Print**

Sort Report Results

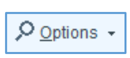
Sorting allows you to arrange report results, placing more emergent cases at the top of the list. For example, maternity patients with earliest expected date of delivery.

Sorting a Single Column

Columns can be easily sorted by clicking the column heading to sort the information. When you first click the column heading the data will sort in Ascending A- Z order. If you click the column heading a second time, the data will sort in Descending Z- A order. If you know that you want the information in Descending order, dates for example, and don't want to wait to sort from Ascending to Descending, right-click the column heading and choose Descending.

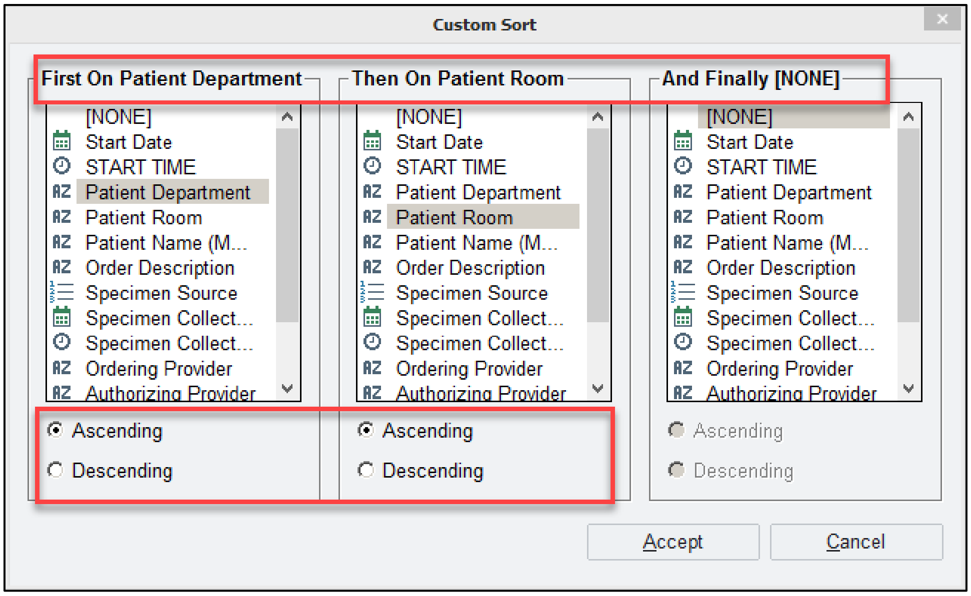
Sorting Multiple Columns

Multiple Columns sorting allows up to three columns to be sorted.

1. From within an open report click 

2. Select 

3. The **Custom Sort** window will appear. In the **First On** section, select the desired first column to sort by and select the sort order; ascending/descending
    - Values will differ depending on report selected

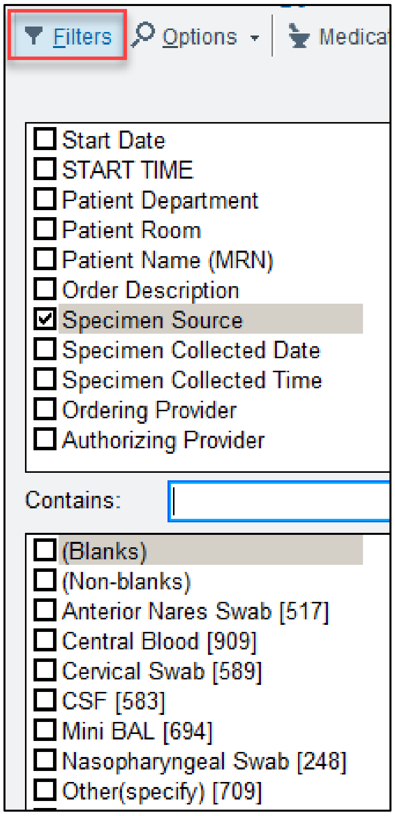


4. In the **Then On** and the **And Finally** sections, select additional columns sorts; as well as sort order for each
5. Click **Accept**
    - The results are sorted according defined preferences

Filter Report Results

Filtering results allows you to focus your attention on specific records, while hiding others, based on a specified condition. If you are only concerned with patients from one department, the Cath Lab for example, you can filter the results for that specific department.

1. From the report result, click **Filters**
    - This will open the **Filter** pane along the left side of the window

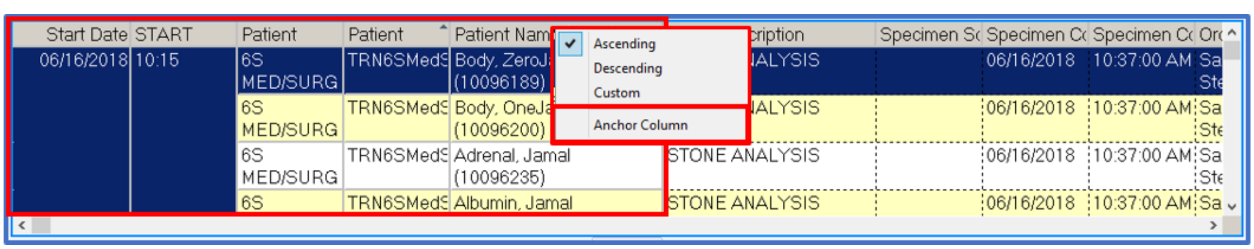


2. Check and uncheck desired items; click **Apply**
    - Values will differ depending on report selected

Anchor Columns

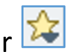
Due to limited real estate on the screen or screen resolution, scrolling is needed to view information in report with a large number of columns. Pertinent patient identifies information often scrolls off the screen making it difficult to keep track of what patient data is being viewed. **Anchor** column allows you to keep a desired column fixed while scrolling, for example Patient Name and MRN. Once a column is anchored, it will always appear on the left side of the screen.

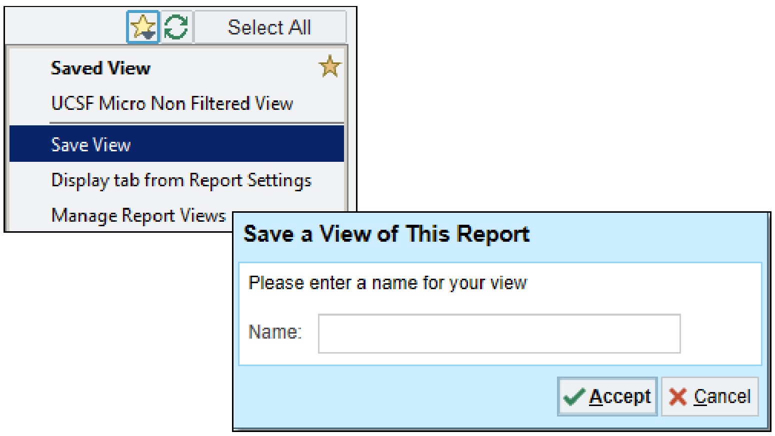
1. From the **Report Results**, right-click the column heading you want to freeze, for example Patient Name
2. Select **Anchor Column**
3. Scroll to the right to the last column; columns to the left will not scroll



Save View

After specifying a specific sort order, filter, or column anchor these settings can be saved together as a View. When the report is ran in the future, the settings will apply.

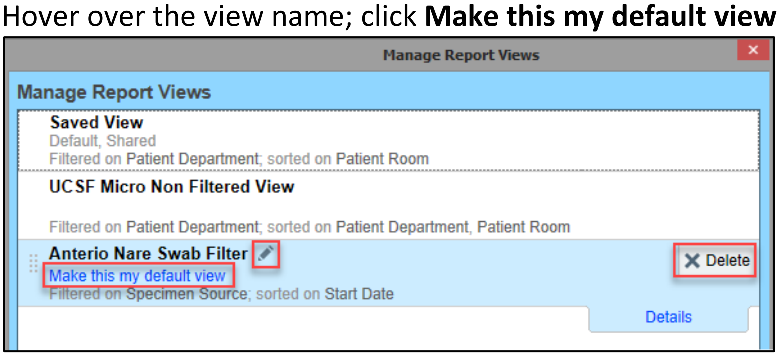
1. To save a view from the **Report Results** screen, click the Gold Star 
2. Click **Save View As**
   - The **Save a View of This Report** window will appear
3. Name the saved view
4. Click **Accept**

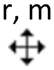
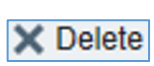


Save View as a Default

Setting a Saved View as a default allows the view to be applied automatically when a report is ran. You can also rename and delete the report views.

1. From the **Report Results** screen, click the **Gold Star** 
2. Click **Manage Report Views**
   - The **Manage Report Views** window will appear
3. Hover over the view name; click **Make this my default view**



4. Click **Accept**
   - To organize the display order, move your mouse to the Selection Margin to the left of the view name until it turns into  and drag the view to the desired location
   - To change the view name, click the Pencil , In the **Rename This View window** type a new name; click Accept
   - To delete the view, click the 

Report Results Follow Up

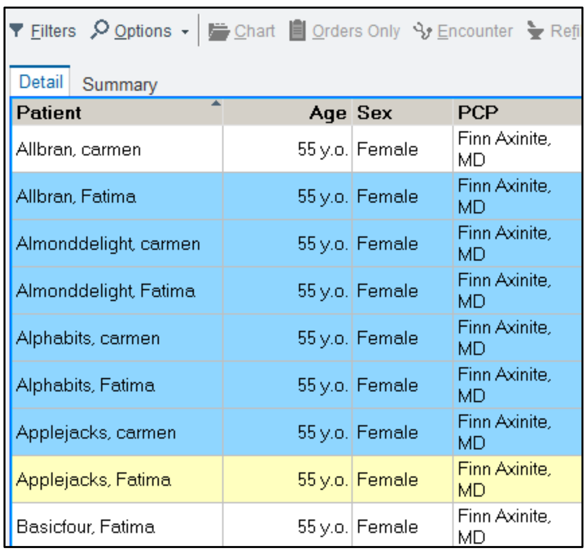
After reviewing a report's results, you can follow up on individual patients or groups of patients. For example, you can review a patient's chart to place an order for a patient. When following up on several patients, you can send them all letters or add them to the same patient list. These follow up actions appear as buttons in the report toolbar. The buttons that appear depend on the report ran.

To follow up on one or more patients in your report results, select the patients and click the button for the appropriate action.

Selecting Continuous Rows

To select continuous blocks of items on a report or list in APeX:

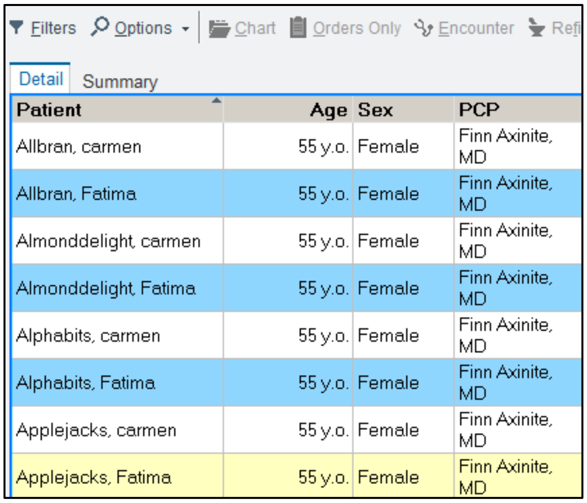
1. Select the first desired row list
2. Hold down the **Shift** key
3. Select the last row desired row on the list



Selecting Non-Continuous Rows

To select non- continuous blocks of items on a report or list in APeX:

1. Select the first patient,
2. hold down the Ctrl key and
3. Select the individual row(s) desired



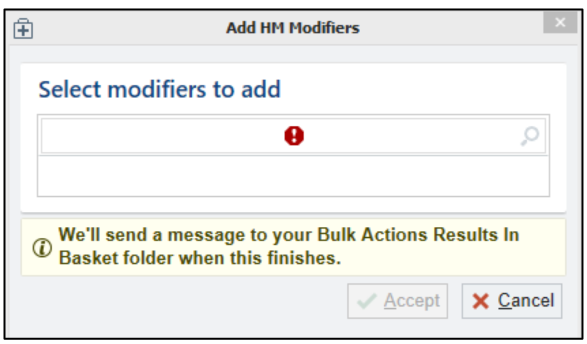
Patient	Age	Sex	PCP
Allbran, carmen	55 y.o.	Female	Finn Axinite, MD
Allbran, Fatima	55 y.o.	Female	Finn Axinite, MD
Almonddelight, carmen	55 y.o.	Female	Finn Axinite, MD
Almonddelight, Fatima	55 y.o.	Female	Finn Axinite, MD
Alphabits, carmen	55 y.o.	Female	Finn Axinite, MD
Alphabits, Fatima	55 y.o.	Female	Finn Axinite, MD
Applejacks, carmen	55 y.o.	Female	Finn Axinite, MD
Applejacks, Fatima	55 y.o.	Female	Finn Axinite, MD

Add Patients to a Health Maintenance (HM) Plan

Health Maintenance modifiers put patients into or exclude patients from Health Maintenance plans (i.e. pap, mammogram, anticoagulation).

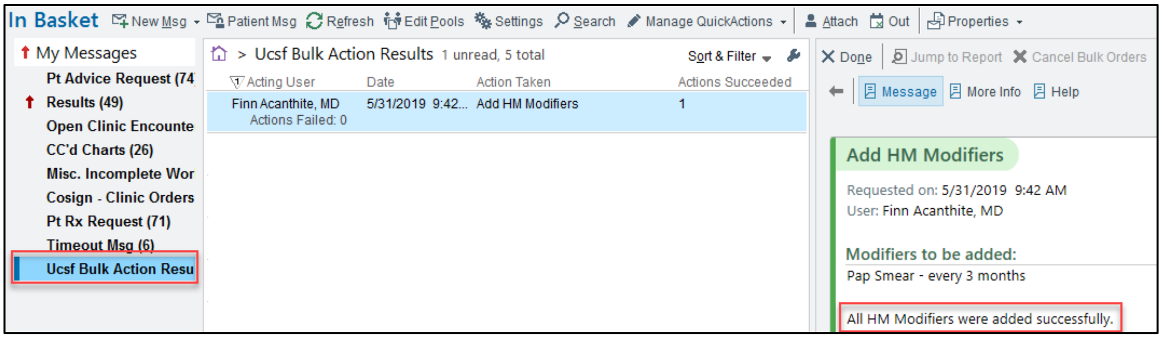
1. From the **Report Results Toolbar**, click the **HM Modifiers** 

    - Depending on the width of the screen, you may find this option in the 

drop-down
2. The **Add HM Modifiers** window displays, in the **Select HM Modifiers** search field, type name of the modifies (i.e. pap, mammogram, anticoagulation)
3. 

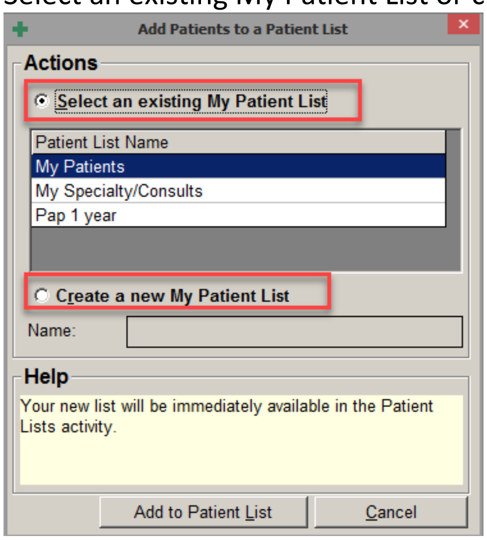
4. Click **Apply**
5. The information message displays indicating an In Basket message will appear when finished
6. Click the **In Basket** 

button on the Main Toolbar
7. Find the **UCSF Bulk Action Results** message to see if the action was successful

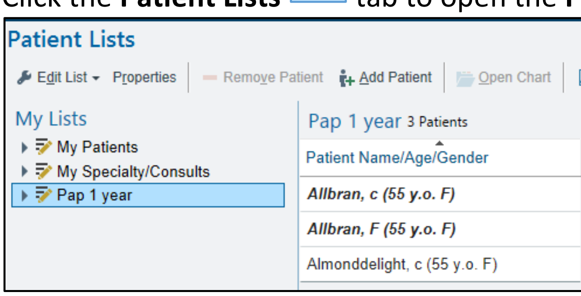


Add Patients to a Patient List

1. From the **Report Results**, select multiple patients
2. From the **Report Results Toolbar**, click Add to List
    - Depending on the width of the screen, you may find this option in the More drop-down
3. This will open the **Add Patients to a Patient List** screen.
    - Select an existing My Patient List or create a new list



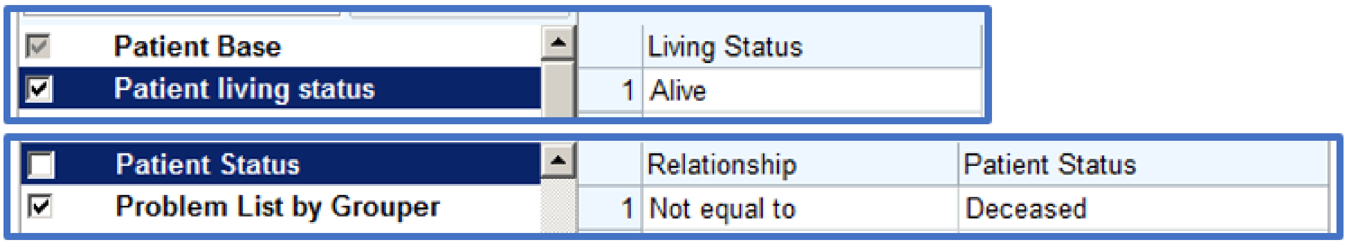
4. Click **Add to Patient List**
5. Click the **Patient Lists** tab to open the **Patient Lists** workspace



6. Select the desired list to view patients

Removing Deceased Patients from Results

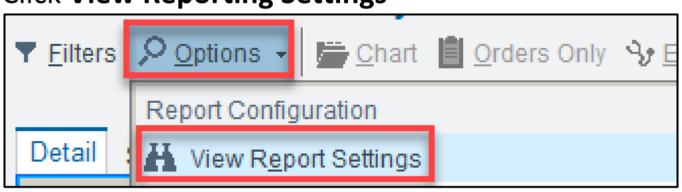
Sometimes deceased patients appear in a report's results. You can exclude deceased patients from certain reports' results. If the report has an exclusion of deceased patients the **Patient living status** criteria is set to **Alive** or the **Patient Status**, Not equal to **Deceased**. Either criteria will filter out deceased patients.



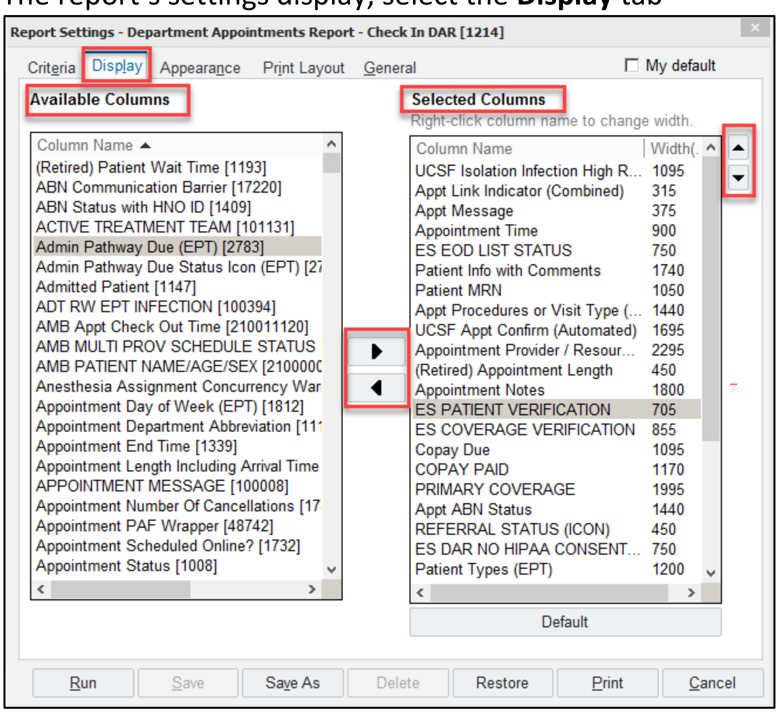
Managing Report Columns

To see additional information about the records in a report's results, you can add additional columns to the results, move the order of the columns, and remove unwanted columns.

1. From the report's result**,** click **Option**
2. Click **View Reporting Settings**



3. The report's settings display, select the **Display** tab

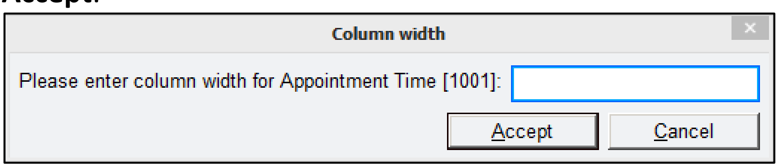


Item	Icon	Description
Available column	Available Columns	List of columns available to add to a report
Selected column	Selected Columns	List of columns currently displayed in the report
Right/Left chevron		Adds and removes columns from available and selected columns
Up/Down chevron		Adjust report columns to the left or the right. Up chevron moves columns to the left. Down chevron moves the column to the right.

4. Save edits

Changing Column Width

1. From the **Report Settings** window, **Display** tab, select the column you wish to change the column width from the **Selected Columns** list.
2. Right-click the row and a **Column Width** window will appear. Type the desired width and click **Accept**.



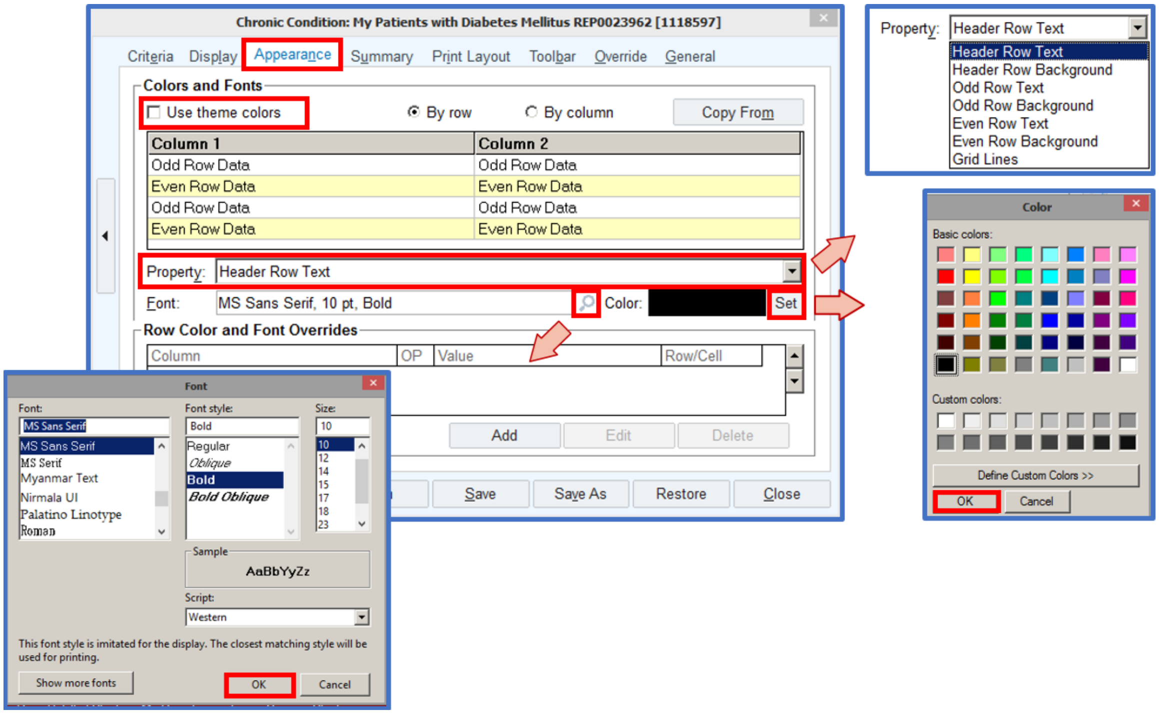
Column width is measured in twips. To figure out how many twips to enter, compare the width of the column you want to change to the width of other columns. 1 Twip is exactly one twentieth (1/20) of a PostScript point. A PostScript point itself being 1/72 of an inch, making a twip 1/1440 inch.

Changing Font and Background Color

Change the color and font of each row or column heading, and the background color of headings, columns, and rows.

1. From the **Report Settings**, select the **Appearance**
2. Uncheck the **Use theme colors** checkbox
3. Select the **By row** or **By column** to indicate whether you're changing the appearance of the rows or columns.
4. Click the **Property** field drop-down to select the area of the results you want to change.
5. In the **Font** field, click **Search**  to open the **Font** window. Select the font type, style, and size.
6. Click **OK**
7. To change the color, click **Set** to the right of the **Color** field
8. Select a color; click **OK**

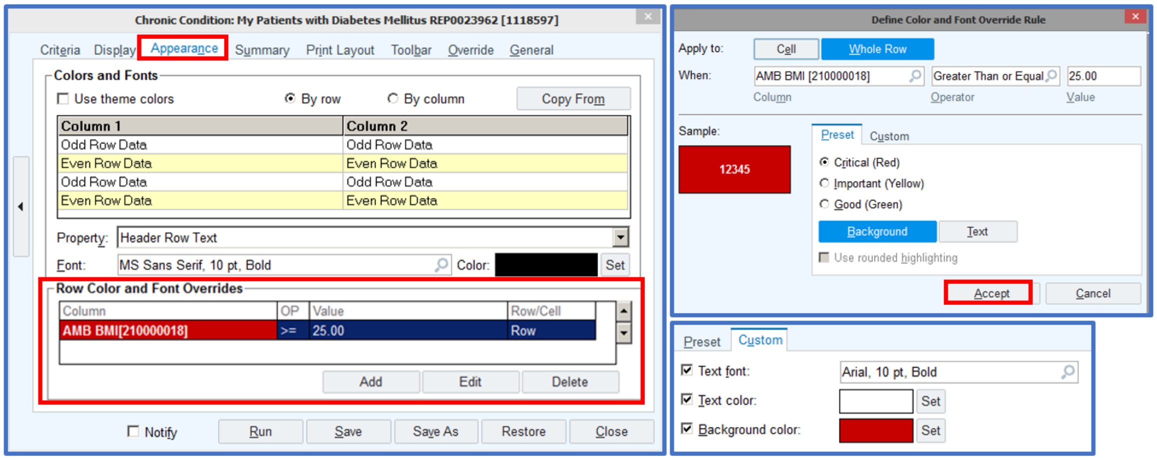
9. Save report and run



Creating Alert Conditions in Results

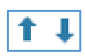
You can change a report's display so specific values in the results stand out. For example, when running a report to see all diabetic patients, you can show those patients whose BMI is greater than 25 with a red background so you can quickly identify those patients.

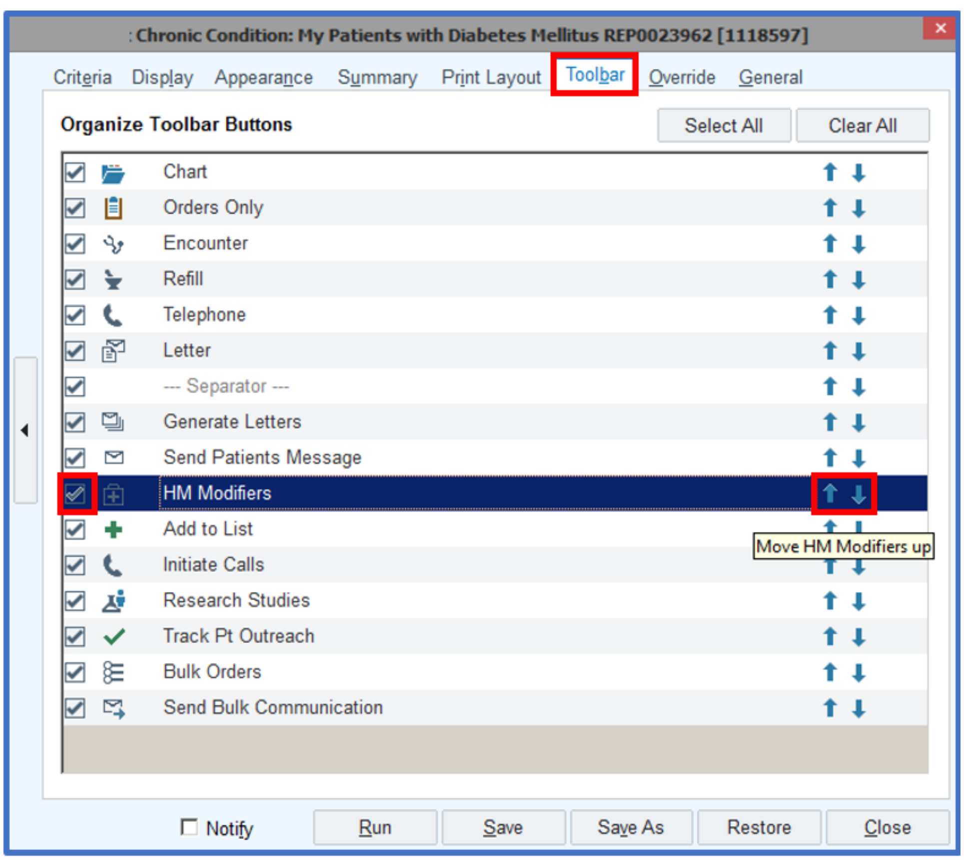
1. From **Report Settings**, select the **Appearance** tab.
2. In the **Row Color and Font Overrides** section, click **Add**
    - The **Define Color and Font Override Rule** window opens
3. In the **Apply to** field, select if the change is to occur for a cell or the entire row
4. In the **When section,** in the **Column** field, select the desired column (i.e. BMI)
5. In the **Operator** field, specify the conditional statement (i.e. equal to, greater than, etc.)
6. In the **Value** field, specify the value
7. On the **Preset** tab, select the alert type
    - Critical (Red) , Important(Yellow), or Good(Green)
    - Select the **Custom** tab to specify the font, color, and background color
8. Click **Accept**



Customizing the Report Results Toolbar

You can remove and rearrange buttons that appear on your toolbar. Customize your toolbar to display activity button commonly used.

1. From **Report Settings**, select the **Toolbar** tab
2. From the Organize Toolbar Buttons list, check or uncheck buttons you wish to show or hide
3. Click the Up or Down Arrow  to move the button up or down the list, which will move the button left or right along the Toolbar



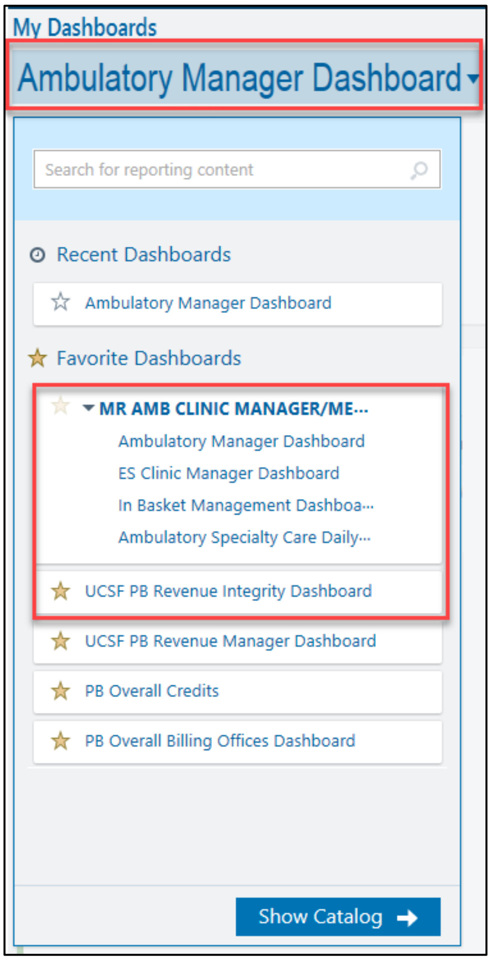
Dashboards

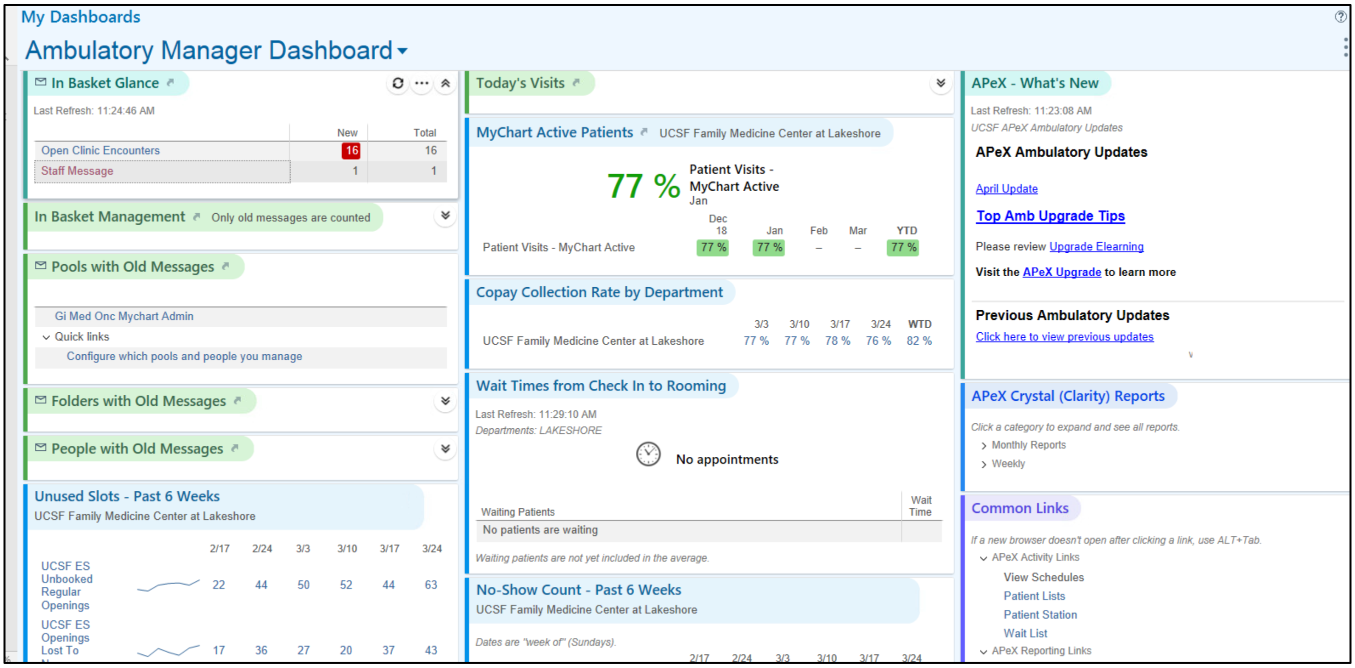
Dashboards centralize information you need throughout your day. Instead of navigating to various screens to run reports, view schedules, and access In Basket messages, all of this information is viewed in a central location. Depending on your security, the **My Dashboard** workspace will appear as your Home Workspace. If **My Dashboard** workspace is not shown by default, follow pathway:

Epic →Reports → My Dashboards.

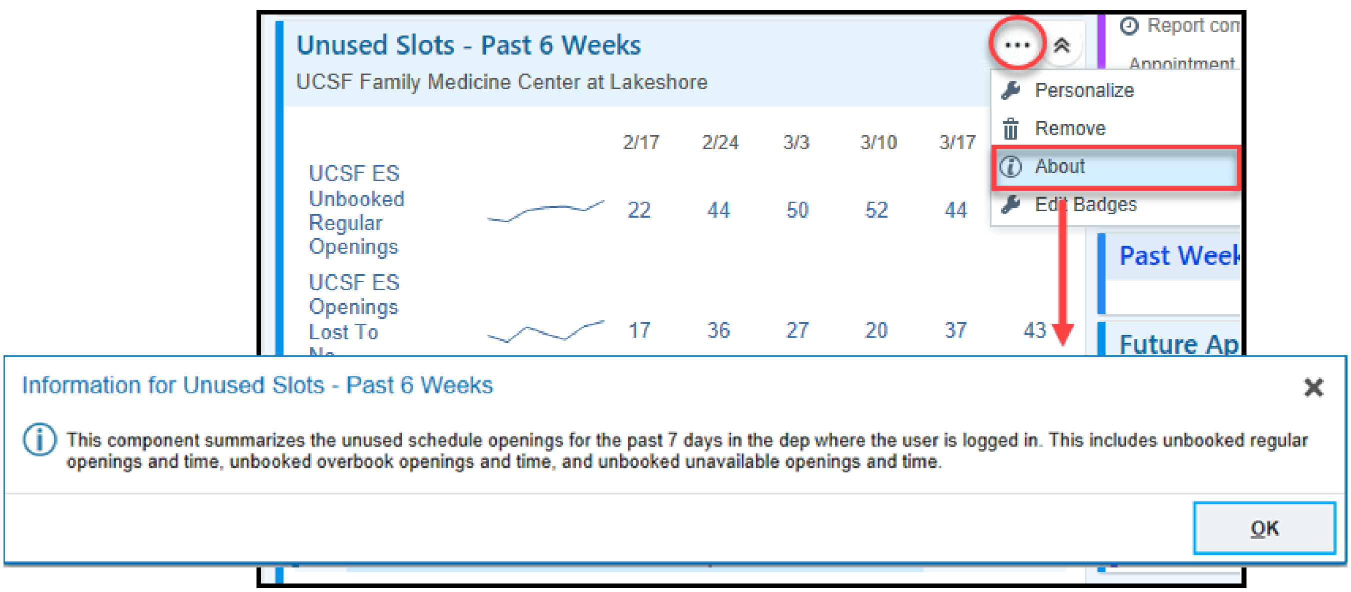
1. There are various types of dashboards: clinical, revenue, and patient access. Dashboards are organized into various components such as In Basket Management, Unused slots, Reports, Common Links, AR Summary/Projections, Claims Pending, etc. or in the search bar, search for **MY DASHBOARDS**.

1. Select the **Dashboard** hyperlink to view dashboard components





1. To view a description of a component, hover the mouse over the component header
2. Click on the ellipsis
3. Select **About** from the menu
   - An Information box displays providing a description of the selected component

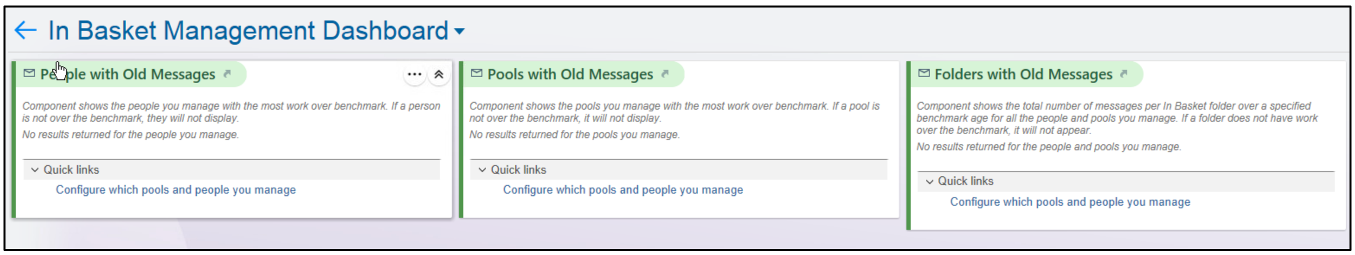


In Basket Management Dashboard

This Apex dashboard is designed to help monitor aging Apex In Basket messages sent to people and pools you oversee.

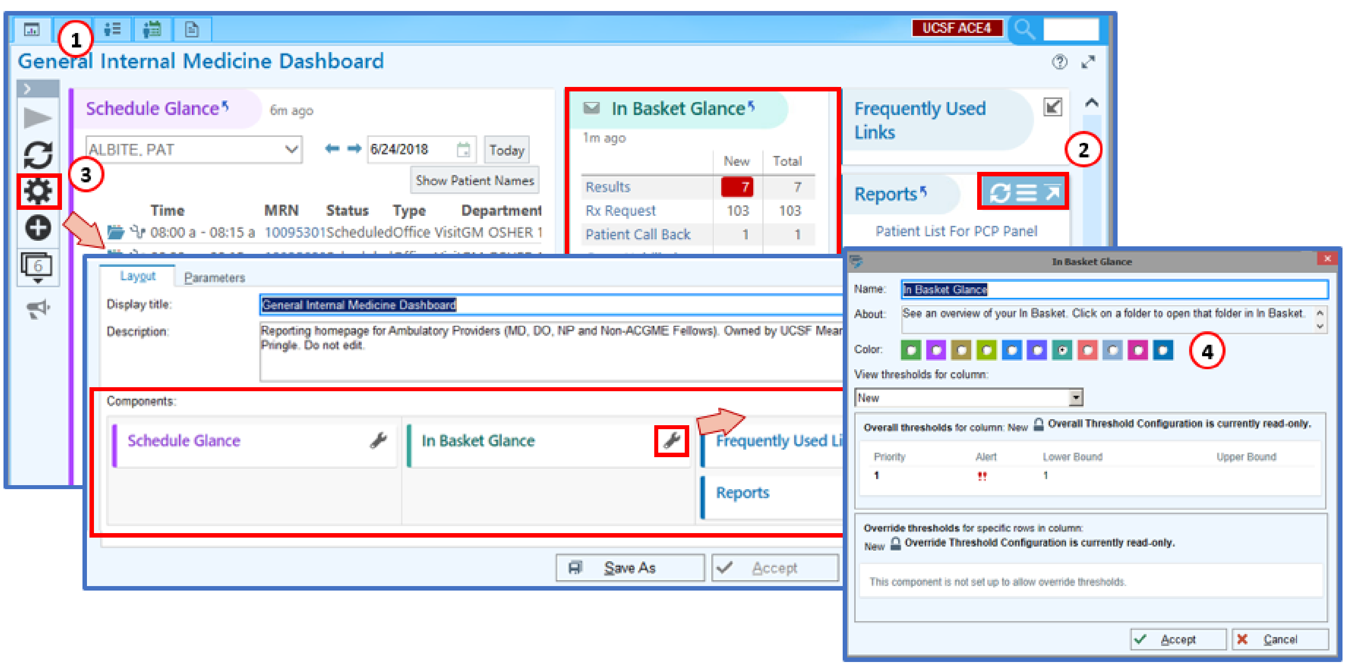
The dashboard has 4 columns:

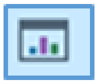
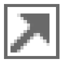
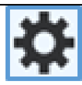
- **People with Old Messages**- People with aging messages
- **Pools with Old Messages-** Clinic pools with aging messages
- **Folders with Old Messages-** Aging messages, by type (i.e. results, Patient call back, etc.)



In Basket Glance Component

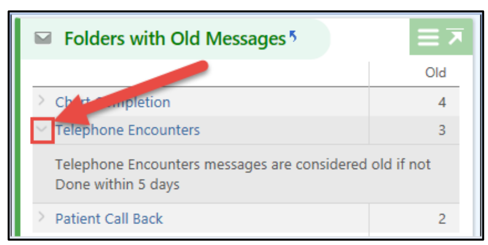
You can directly access your **In Basket** from a dashboard. Your **In Basket Glance** component contains a summary of your In Basket folders and unread emails. Clicking a folder brings you directly to that folder in the In Basket. If the **In Basket Glance** component is not available, you can request access by contacting the Help Desk.



	Icon	Definition
1	 My Dashboard	**My Dashboard** workspace will be the first screen that will appear otherwise, click the **My Dashboard** tab.
2	 Diagnoal Arrow	**Diagonal Arrow** will collapse and expand the component. Hover the mouse over the right corner of the component. You will see a Diagonal Arrow
3	 Wrench	The **Wrench** beside a component allows you to change the component name, color, and view threshold.
4	 Gear	Opens the **Dashboard Settings,** here you can change the display title and change the order and configuration of the dashboard components.

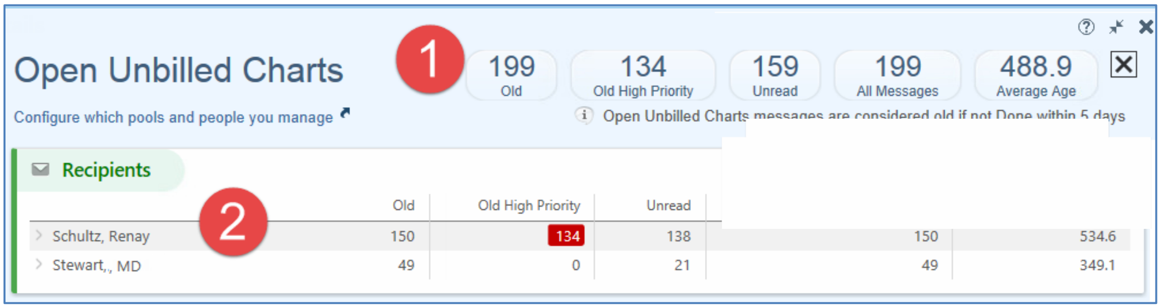
Folders with old messages

- All folders that have aging messages, regardless of whether they are in a pool or in a provider's In Basket, appear here sorted by message type.



- To see the definition of "aging" for each message type, click the **>** arrow just to the left of the folder name.

- Click a folder name to open a drill-down dashboard that shows 2 types of information:



1. Statistics about all messages
2. Staff or providers with aging

- Click the > arrow to the left of a person's name to attach to that particular folder in the user's In Basket.

Cheat Sheet

The following is a list of shortcuts to help you navigate in APeX.

Keyboard Shortcuts	
CTRL+ALT+L	Log out of Hyperspace.
CTRL+ALT+S	Secure your workstation.
TAB or SHIFT+TAB	Move to the next or previous field.
CTRL+TAB or CTRL+SHIFT+TAB	Access next or previous Workspace tab.
CTRL+ALT+Number	Access the second (2), third (3), etc., Workspace tab depending on the number pressed.
CTRL+C	Copy selected text.
CTRL+V	Paste text that you copied.
CTRL+P	Prints documents like reports or patient instructions.
CTRL + PAGE UP / PAGE DOWN	Select Next or Previous Dashboard
ALT+O	Open the Dashboard Launcher window.
ALT+E	Open the Dashboard Settings window.
ALT+R	Refresh Dashboard.
ALT+P	From Library tab, Collapse and Expand all templates.
ALT+S	From Library tab, access the Search field.

Relative Date Criteria	
T	Today
W-1	Last Week
M-1	Last Month
Y-1	Last Year

Notes