

Redefining possible."

Reporting

# 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	

Organization:			ubject:	Application:
UCSF Health		Reporting		All
Owning Department: Principal Tra		ainer:	<b>Revision Date:</b>	EPIC Version:
APeX -Training Clinical Systems Gisselle Rho		des	07/17/19	V2018
	Tania Walke	er		

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## **Getting Started**

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

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## 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

#### $\rightarrow$ Reports $\rightarrow$ My Reports

Or select My Reports link from the Dashboard in the Common Links section (scroll if needed).



2. My Reports 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

<b>+ + -</b>	ibrary			
2	No Show OSearch Clear			
My Reports	360 Positive Care Center No Show Pt Level REP0067547 Crystal Report lists the appointment status for each appointment for Department 360 Positivie Health			
	☆     ES Auto Generated No-Show Prediction Report       ☆     ES Auto Generated No-Show Prediction Report			
Library				
☆ GT Patient No Show or Late Cancel 72hrs for Hepatology REP0062235 c Patient No Show or Late Cancel 72hrs for Hepatology REP0062235				

## **Filters**

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

	Filters	
Reports I ov	'n	
Reports I rai	n recently	
Reports I an	n subscribed to	
Types		8
Groups		8
Template Types		8
Tags		8
	X Clear <u>F</u> ilters	

Filter Type	Filter Definition	
Reports I own or Reports I ran	Searches for reports you own or reports recently ran	
recently		
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**  $\overrightarrow{kar}$  icon to the left of the report name to make it a **Favorite**.
  - Reports selected as Favorites will appear in My Reports

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+ + -	My Reports	
<b>M</b>	My Favorite Reports	
My Reports	Folders	Yesterday's No Show Appointments REP1125733 Viewed - No results

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

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## **Practice Exercise**

- 1. From the Library tab, click Template Types
- 2. Check the **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

 ☆
 All In Basket Work Completed and Not Completed Excel Format REP0065105 Crystal

 ☆
 In Basket Volume REP0015040 Crystal

 ☆
 RX Pharmacy In-basket Turnaround Time Source Data REP0065685 Crystal

 RX Pharmacy In-basket Turnaround Time Source Data REP0065685

- 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



1

From the **My Reports** tab, **My Favorite Reports**, to remove a report from the favorites, rightclick the report name and choose the **Remove From Favorites** option. From the **Library**, the

**Star**  $\bowtie$  icon is a toggle, click the icon to set as a Favorite turning the **Star** gold  $\bowtie$  or clear the setting.

#### Manage Your Favorites

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

- 1. My Reports  $\rightarrow$  My Favorite Reports
- 2. Click Create a new folder
- 3. In the New folder name field, enter in a report name

Create a New Folder				
Favorite folders are a great way to organize your frequently run reports. Please enter the name for your new folder.				
New folder name:				
	<u>✓ A</u> ccept	X <u>C</u> ancel		

4. The folder displays in the My Favorites Reports

My Favorite Repo	orts	
Folders Visit Volumes	S	Visit Volumes
Televox	9	There are no reports in this folder. Drag reports from other folders here, or click here to delete this folder.
No Show	×	Televox
		There are no reports in this folder. Drag reports from other folders here, or click here to delete this folder.
		No Show 💉
		There are no reports in this folder. Drag reports from other folders here, or click here to delete this folder.

- 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

Cancer Center Referral Workqueue User Productivity re... Click to run

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.

Open results immediately

## Manage Report Criteria

## **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

	TW Unconfirmed Appts. with No-Show Risk No Show rate [3510710]	×
	Crit <u>e</u> ria Disp <u>l</u> ay Appeara <u>n</u> ce S <u>u</u> mmary Pr <u>i</u> nt Layout Tool <u>b</u> ar <u>O</u> verride <u>G</u> eneral	
	⑦ Search Appointments	
	From date: 5/27/2019 (T) 📋 To: 5/30/2019 (T+3) 🗒	
	Filter criteria + Add Enter Search Values	In <u>f</u> o
	O Dept specialty     Ocenter	
	Center 1	
	O Dynamic departments	
	O Dept specialty to exclude     O Center to exclude	
4	<ul> <li>O Dept and prov to exclude</li> </ul>	
	<ul> <li>✓ O Status</li> <li>✓ O Visit type</li> </ul>	
	□ O Check-in person	
		Þ
	And Or Custom	
	Find Appointments between 5/27/2019 (T) and 5/30/2019 (T+3)	
	From	^
	Status: Scheduled [1]	
	Where	
	Confirmation status:	~
	□ Notify Run Save Save As Restore	<u>C</u> lose

- 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. <sup>(2)</sup> 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.

From date: M-1 🛗 To:	ή	i.
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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. Run <u>Edit</u> <u>Nelete</u> This option is only available for reports you have created.

#### **Report Notifications**

 $(\mathbf{i})$ 

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

	TW Unconfirmed Appts. with No-Show Risk No Show rate [3510710]	×
	Crit <u>e</u> ria Disp <u>l</u> ay Appeara <u>n</u> ce S <u>u</u> mmary Pr <u>i</u> nt Layout Tool <u>b</u> ar <u>O</u> verride <u>G</u> eneral	
		-11
	From date: 5/27/2019 (T) 📋 To: 5/30/2019 (T+3)	
	Filter criteria + Add Enter Search Values Info	
	O Dept specialty     Department     Provider	F
		4
	Operatment and provider     Opnamic departments	
	<ul> <li>O Dept specialty to exclude</li> </ul>	
	O Center to exclude	
4	O Dept and prov to exclude	
1	☑ O Status	
	O Visit type     O Check-in person	
		F
	And Or Custom	
	00000	
	Find Appointments between 5/27/2019 (T) and 5/30/2019 (T+3)	
	From	
	Status: Scheduled [1]	
	Where	
	Confirmation status:	~
	☐ Notify Run Save Save As Restore Close	5

## **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
  - o Expired reports will not show unless you check the Expired checkbox

```
Show: Expired Scheduled
```

	Recent Results	Saved Results (0)
	Report	
Å	Adult Cancer Servic Valid until 05/03/201	es FY18 All Practices Infusion and Rad Onc and Neuro Onc Revised Feb 2019 9 1:56 PM
☆	Adult Cancer Servic Valid until 05/03/201	es FY17 All Practices Infusion and Rad Onc and Neuro Onc Revised Feb 2019 I9 1:34 PM
☆	Adult Cancer Servic Valid until 05/03/201	es FY19 All Practices Infusion and Rad Onc and Neuro Onc Revised Feb 2019 IQ 1:31 PM

• 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.

Breast Practice Referral Workqueue User Productivity las... Ready to run

• 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

	Save Results	×
Name:	Breast Practice Referral W	/orkqueue User Pro
Expiration:	5/29/2019	
	<u>A</u> ccept	<u>C</u> ancel

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**

Print Detail	
Print List	
UCSF Microbiology Orders Collected But Not Receive	

• 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** 

AMBMD00 Yesterdays No	Show Appointments	REP11257
Print Current Tab		
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 🗢 Sort
- 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

	Custom Sort	
First On Patient Department	Then On Patient Room	And Finally [NONE]
[NONE]       ▲         Image: Start Date       ③         Start Date       ③         START TIME       Patient Department         R2       Patient Department         R2       Patient Room         R2       Patient Name (M         R2       Order Description         Image: Specimen Source       Image: Specimen Collect         Image: Ordering Provider       R2         Authorizing Provider       Y	[NONE]       ▲         Image: Start Date       ③         Image: Start Date       ③         Image: Start Date       ④         Image: Start Date       ●         Image: Start Date	[NONE]       ▲
Ascending	• Ascending	<ul> <li>Ascending</li> </ul>
C Descending	C Descending	C Descending
		Accept Cancel

- 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

Start Date	START	Patient		Patient Nam	~	Ascending	cription	Specimen Sc Specimen Co	Specimen Cc Orc^
06/16/2018	10:15	6S MED/SURG		Body, ZeroJ: (10096189)		Descending Custom	IALYSIS	06/16/2018	10:37:00 AM Sa Ste
		6S MED/SURG		Body, OneJa (10096200)			IALYSIS	06/16/2018	10:37:00 AM Sa St∈
		6S MED/SURG		Adrenal, Jam (10096235)	al	STONE AN	IALYSIS	06/16/2018	10:37:00 AM Sa St∈
		6S	TRN6SMedS	Albumin, Jam	nal	STONE AN	IALYSIS	06/16/2018	10:37:00 AM Sa 🗸
<									>

## 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

Manage Report Views	×
Manage Report Views	
Saved View Default, Shared Filtered on Patient Department; sorted on Patient Room	
UCSF Micro Non Filtered View Filtered on Patient Department; sorted on Patient Department, Patient Room	
Anterio Nare Swab Filter Make this my default view Filtered on Specimen Source; sorted on Start Date	× Delete
	Details

- 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 *(Interpreted)*, In the **Rename This View window** type a new name; click Accept
  - To delete the view, click the Delete

## **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

🝸 Eilters 🔎 Options - 🛛 🚔 Chart 📋 Orders Only 😚 Encounter 🋬 Refi			
Detail Summary			
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
Basicfour, Fatima	55 y.o.	Female	Finn Axinite, MD

## 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

▼ <u>F</u> ilters ♀ <u>O</u> ptions →	<u>C</u> hart <u>O</u> rder	rs Only 👌 🗄	ncounter 🎍 Re <u>f</u> i
Detail Summary			
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 More 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)

]	Add HM Modifiers
Select r	nodifiers to add
	م, 9
We'll s	end a message to your Bulk Actions Results In
(i) Baske	end a message to your Bulk Actions Results In t folder when this finishes.

4. Click Apply

3.

- 5. The information message displays indicating an In Basket message will appear when finished
- 6. Click the **In Basket** Basket button on the Main Toolbar
- 7. Find the UCSF Bulk Action Results message to see if the action was successful

In Basket ଔNew <u>M</u> sg →	Patient Msg CRefre	esh 👘 Edit <u>P</u> ools	🍇 Settings 👂 Search	🖋 Manage QuickActions 👻	🛔 Attach 🛱 Out 🛛 🗗 Properties 👻
My Messages	🟠 > Ucsf Bulk Acti	on Results 1 un	read, 5 total	S <u>o</u> rt & Filter 🚽 🖋	X Done Dump to Report X Cancel Bulk Orders
Pt Advice Request (74)	√ Acting User	Date	Action Taken	Actions Succeeded	← 🗏 Message 🗏 More Info 🗏 Help
Results (49)	Finn Acanthite, MD	5/31/2019 9:42	Add HM Modifiers	1	More into E Help
Open Clinic Encounte	Actions Failed: 0				
CC'd Charts (26)					Add HM Modifiers
Misc. Incomplete Wor					
Cosign - Clinic Orders					Requested on: 5/31/2019 9:42 AM
Pt Rx Request (71)					User: Finn Acanthite, MD
Timeout Msg (6)					Modifiers to be added:
Ucsf Bulk Action Resu					Pap Smear - every 3 months
					rap sincer every sinonuis
					All HM Modifiers were added successfully.

## 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

+	Add Patients to a Patient List								
Action	s								
€ <u>S</u> ele	ect an existing My Patient List								
Patient	Patient List Name								
My Pat	ients								
My Spe	ecialty/Consults								
Pap 1	Pap 1 year								
⊂ C <u>r</u> ea	ate a new My Patient List								
Name:									
-Help-									
Your new Lists acti	list will be immediately available in the Patient vity.								
	Add to Patient List Cancel								

4. Click Add to Patient List

## 5. Click the Patient Lists is tab to open the Patient Lists workspace



6. Select the desired list to view patients

## **Modify Reports**

## **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.

Patient Base Patient living status	<u> </u>	Living Status Alive	
Patient Status		Relationship F	atient Status
Problem List by Grouper	1	Not equal to C	)eceased

## 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	×					
Please enter column width for Appointment Time [1001]:						
Accept	<u>C</u> ancel					



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** loopen 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**

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#### 9. Save report and run

		Chronic Condition: My Pa	ients with Diabetes Mellitus REP0023962 [1118597]	Property: Header Row Text
		Crit <u>e</u> ria Display Appeara <u>n</u> ce Summ	ary Print Layout Toolbar Override General	Header Row Text
				Header Row Background
		Colors and Fonts		Odd Row Text
		Use theme colors	By row O By column Copy From	Odd Row Background Even Row Text
		Column 1	Column 2	Even Row Background
		Odd Row Data	Odd Row Data	Grid Lines
		Even Row Data	Even Row Data	
		Odd Row Data	Odd Row Data	Color
	4	Even Row Data	Even Row Data	Basic colors:
		Property: Header Row Text	<u> </u>	
	-	Font: MS Sans Serif, 10 pt, Bold	🔎 Color: Set	
		- Row Color and Font Overrides		
		Column	OP Value Row/Cell	
			OF Value RowCell	
		Font	×	Custom colors:
Font:		Font style: Size:		
MS Sans Serif MS Sans Ser		Bold 10	Add Edit Delete	
MS Serif MS Serif	rii	Oh/smin 12		
Myanmar Te	ext	Bold 14		Define Custom Colors >>
Nirmala UI			Save Save As Restore Close	OK Cancel
Palatino Lir Roman	notype	23 ~		
		Sample		
		AaBbYyZz		
		Script:		
		Western		
This font style used for printir		ted for the display. The closest matching style will be		
Show more	e fonts	OK Cancel		

#### **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

	Chronic Condition: M	y Patients with Diabet	es Mellitus REP0023962 [	1118597]	×			Define C	olor and Font Override Rule	.	×
Crit <u>e</u> ria Disp <u>l</u>	ay Appearance S	ummary Print Layou	t Tool <u>b</u> ar <u>O</u> verride	<u>G</u> eneral		Apply to:	C <u>e</u> ll	Whole Row			
Colors and	Fonts					When:	AMB BMI [210	000018]	Greater Than or Equal	25.00	
🗖 Use ther	me colors	O By row	C By column	Copy From	1		Colu <u>m</u> n		Operator	<u>V</u> alue	
Column 1			umn 2			Sample:	P	reset Custom			_
Odd Row [			Row Data								
Even Row			n Row Data			123	540	Critical (Red)			
Odd Row [			Row Data				0	Important (Yello	w)		
Even Row	Data	Eve	n Row Data				0	Good (Green)			
Property:	Header Row Text				•			<u>B</u> ackground	Text		
	VIS Sans Serif, 10 pt,	Bold	Color:		Set		F	Use rounded <u>h</u> iç	phlighting		
Row Color	and Font Overrides								Accept	Cancel	
Column		OP Value		Row/Cell					Accept	Gancer	-
AMB BMI	210000018]	>= 25.00		Row	* *	Preset	Custom				
						Fleser	0 <u>u</u> stonii				
		٨	dd Edit	Delete		🗹 Text <u>f</u> or	nt:	Arial, 10 pt,	Bold	9	
		^	uu Euli	Delete		⊡ <u>T</u> ext co	alar		Set		
						I Text co	5101.		Sec		
							round color:				

## **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

	: Chronic Condition: My Patients with Diabetes Mellitus REP0023962 [1118597]								
	Crit <u>e</u> ria Di	sp <u>l</u> ay Appeara <u>n</u> ce	S <u>u</u> mmary	Print Layout	Tool <u>b</u> ar	<u>O</u> verride	<u>G</u> eneral		
	Organize	Toolbar Buttons				Selec	et All	Clear All	
	🗹 🎽	Chart						<b>†</b> ↓	
	🗹 🗎	Orders Only						<b>†</b> ↓	
	🗹 મેટ	Encounter						†↓	
	🗹 🛬	Refill						† ↓	
	ي 🗹	Telephone						† ↓	
	🗹 🚰	Letter						† ↓	
		Separator						† ↓	
•	🗹 🗳	Generate Letters						† ↓	
		Send Patients Mes	sage					<u>† ↓</u>	
	🗹 🕀	HM Modifiers						↑↓	
	🗹 +	Add to List					Move H	M Modifiers up	
	✓ €	Initiate Calls					moren	T I	
	🗹 👎	Research Studies						<b>↑↓</b>	
	Image: A matrix of the second seco	Track Pt Outreach						<b>†</b> ↓	
	⊒ 8≣	Bulk Orders						<b>↑↓</b>	
	🗹 🖙	Send Bulk Commun	nication					†↓	
		□ Noti <u>f</u> y	<u>R</u> un	<u>S</u> ave	Sa <u>v</u> e	As	Restore	<u>C</u> lose	

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## Dashboards

#### 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 $\rightarrow$ Reports $\rightarrow$ My Dashboards.

- 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



🖾 In Basket Glance 🦉		0(	Today's Visits 🖉 👻	APeX - What's New
Last Refresh: 11-24-46 AM Open Clinic Encounters Staff Message	New 16	Total 16 1	MyChart Active Patients * UCSF Family Medicine Center at Lakeshore 77 % Patient Visits - MyChart Active	Last Refresh: 11:2300 AM UCSF APeX Ambulatory Updates APeX Ambulatory Updates April Update
In Basket Management 존 Only old m 의 Pools with Old Messages 존	essages are counte	1	Dec 18 Jan Feb Mar YTD Patient Visits - MyChart Active 77 % 77 % 77 % Copay Collection Rate by Department	Top Amb Upgrade Tips           Please review Upgrade Elearning           Visit the <u>APeX Upgrade</u> to learn more
Gi Med Onc Mychart Admin V Quick links Configure which pools and people you n	anage		3/3 3/10 3/17 3/24 WTD UCSF Family Medicine Center at Lakeshore 77 % 77 % 78 % 76 % 82 %	Previous Ambulatory Updates Click here to view previous updates
Folders with Old Messages		(	Wait Times from Check In to Rooming Last Refresh: 11:29:10 AM Departments: LAKESHORE	APeX Crystal (Clarity) Reports Click a category to expand and see all reports.
People with Old Messages		C	No appointments	> Monthly Reports > Weekly
Jnused Slots - Past 6 Weeks JCSF Family Medicine Center at Lakeshore			Valting Patients Valt Time No patients are waiting	Common Links
2/17 2/2 UCSF ES Unbooked Regular Openings		3/17 3/24 44 63	Waiting patients are not yet included in the average. No-Show Count - Past 6 Weeks UCSF Family Medicine Center at Lakeshore	If a new browser doesn't open after clicking a link, use ALT+Tab. ↓ APeX Activity Links View Schedules Patient Lists Patient Station
UCSE ES				Wait List

- 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

	Unused Slots			ore				Persor	<ul> <li>Report con</li> <li>Annointment</li> <li>nalize</li> </ul>	
	UCSF ES		2/17	2/24	3/3	3/10	3/17	ि Remov	/e	
	Unbooked Regular Openings		22	44	50	52	44	🌮 Edit Ba	adges Past Week	
	UCSF ES Openings Lost To	$\sim$	17	36	27	20	37	43	Future Ap	
Information for Unused	Slots - Past 6 We	eeks								×
This component summa openings and time, unbo								ged in. This	includes unbooked	regular
										<u>о</u> к

#### 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 Management Dashboard -								
🖻 Pe 🖢 ple with Old Messages 🍙 👘 🔹	Pools with Old Messages	☑ Folders with Old Messages						
Component shows the people you manage with the most work over benchmark. If a person is not over the benchmark, they will not display. No results returned for the people you manage.	Component shows the pools you manage with the most work over benchmark. If a pool is not over the benchmark, it will not display. No results returned for the pools you manage.	Component shows the total number of messages per in Basket folder over a specified benchmark age for all the people and pools you manage. If a folder does not have work over the benchmark, it will not appear. No results returned for the people and pools you manage.						
<ul> <li>Quick links</li> <li>Configure which pools and people you manage</li> </ul>	✓ Quick links Configure which pools and people you manage	✓ Quick links Configure which pools and people you manage						

#### 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.

	UCSFACE4						
	×۲ (۲)						
In Basket Glance <sup>5</sup>	Frequently Used 🗹 🔨						
1m ago New Total	Links 2						
Results 7 7	Reports <sup>5</sup> GER						
Rx Request     103     103       Patient Call Back     1     1	Patient List For PCP Panel						
	🛜 In Basket Glance						
Laygut Parameters Display title: General Internal Medicine Dashboard							
D, NP and Non-ACGME Fellows). Owned by UCSF Mea							
	View thresholds for column:						
Frequently Used I	Overall thresholds for column: New 🔐 Overall Threshold Configuration is currently read-only.						
	Priority Alert Lower Bound Upper Bound 1 !! 1						
Reports							
	Override thresholds for specific rows in column: New  Override Threshold Configuration is currently read-only.						
RI Save As	This component is not set up to allow override thresholds.						
	Accept X Cancel						
	Im ago     New     Total       Results     7     7       Rx Request     103     103       Patient Call Back     1     1						

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	lcon	Definition
1	My Dashboard	<b>My Dashboard</b> workspace will be the first screen that will appear otherwise, click the <b>My Dashboard</b> tab.
2	Diagnoal Arrow	<b>Diagonal Arrow</b> 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 <b>Wrench</b> beside a component allows you to change the component name, color, and view threshold.
4	<b>F</b> Gear	Opens the <b>Dashboard Settings,</b> 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:



Open Unbilled Charts Configure which pools and people you manage <b>*</b>	1		134 Did High Priority Open Unbilled (	159 199 Unread All Messages Charts messages are considered old	⑦ ★ 3 488.9 Average Age Lif not Done within 5 days
Recipients					
	Old	Old High Priority	Unread		
> Schultz, Renay	150	134	138	150	534.6
> Stewart,, MD	49	0	21	49	349.1

- 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					
т	Today				
W-1	Last Week				
M-1	Last Month				
Y-1	Last Year				

Notes	