Dashboards and Reports Overview

Purpose:

This document is a quick reference guide on how to set the dashboards and run reports as a Clinic Manager. This is applicable to flu and COVID functionality.

For the latest My Turn educational materials, please visit EZIZ- Covid, EZIZ – Flu, YouTube or the Knowledge Center tab on My Turn Clinic

My Turn Help Desk
Direct Line: 1-833-502-1245, Option 4
Email: My Turn.Clinic.HD@accenture.com

Clinic Dashboard

1.	Select the **Home** tab to view your **Dashboard**.
2.	On the right side of the Home screen, make menu selections to set up a Dashboard view: • Select **COVID – 19** or **Flu** view, then Select the **Date**
3.	Select from which provider **Account(s)** you wish to view data by using the **Select Account** drop-down-menu.
4.	Select from which provider **Clinic(s)** you wish to view data by using the **Select Clinic** drop-down-menu.
5.	Click the **Load Dashboard** button to populate the dashboard with data from the selected **Account(s)** and **Clinic(s)**.
6.	A list of frequently used **Reports** can be found on the bottom right of the dashboard screen. Click the link provided to view the report.

Notes:

- This dashboard shows data for COVID or Flu appointments (including Additional doses and Booster Doses).
- Filters are retained within the same browser session when navigating away from the Dashboard.
- The Dashboard displays the following aggregate for the chosen date:
  - Appointments by status
  - Pending appointment by vaccine type
  - Pending Pediatric Appointments
  - Pending Moderna/Pfizer by dose number including Additional Dose and Booster Dose
  - Number of appointments with reasonable accommodations
  - Last appointment time today

Intraday Operations Report

Clinic Managers can also review information regarding a clinic's day-to-day operational averages via the Intraday Operations report.

1.	From the **Homepage**, select the **More** drop list from the My Turn Clinic toolbar, then select **Intraday Report** from the drop-down menu.
2.	Enter the date range for the report you wish to review by selecting dates in the **From** and **To** fields.
3.	Select a clinic from which to view intraday data by using the **Clinics** drop-down menu.
4.	Click on the **Search** button to generate the report.
6.	If your clinic's **Intraday Operations** report has multiple pages, navigate between them using the **First**, **Previous**, **Next**, and **Last** buttons beneath the User data section.

Notes:

- To populate intraday reports, you MUST change the **From** and **To** fields to the date range you wish to view before clicking **Search**. For example, if you wish to search from today's date, click **From** another date then click **To** today's date before clicking **Search**.
- Intraday Operations data can only be populated outside of clinic operating hours (5:00AM-8:00AM or 5:00PM-11:59PM PST)"
- The **Intraday Operations** report displays the following data for **Users** and **Appointments**:
  - **Left (Users):** View productivity information for each user, including how long their appointments are in a "checked in" and "pending complete" status
  - **Right (Appointments):** View appointment data broken down by day, including the average time each appointment was in the "checked in" and "pending complete" status, as well as the total number of appointments seen each day

Clinic-Level Reporting

1.	From the **Homepage**, select the **Clinics** tab from the My Turn Clinic toolbar.
2.	Search for and select the clinic whose clinic-level reports you wish to pull. The **Clinic Details** page displays.
3.	Select the **Reporting** tab.
4.	Specify if you wish to view information for a given **Day** or **Week** by clicking the corresponding button.
5.	Select the desired date(s) from the calendar. Appointment information displays for the day or week selected.

Notes:
The dashboard includes the following data:

- **Total Slots** (total number of appointments)
- **Scheduled Appointments** (number of scheduled appointments)
- **Reserved Appointments** (number of individuals actively booking an appointment through the patient portal at the moment the report is generated)
- **Available Slots** (number of available appointment slots remaining at the clinic)
- To the right, the **Total remaining vaccine stock** available at the clinic can be reviewed by the user

Reports and Brief Description

REPORT TITLES	BRIEF DESCRIPTIONS
2nd Dose Follow-Up Report	*Shows patients that do not have a 2nd dose scheduled.*
Active Clinic List	*Shows which clinics are active. Includes clinic details.*
Additional Dose Report	*Shows the number of additional dose appointments scheduled at each clinic.*
Appointment by Dose Number and Brand	*Shows first dose and second dose appointments per clinic, with manufacturer information.*
Appointments – Today	*Shows the appointments by status for today.*
Appointments – Tomorrow	*Shows the appointments by status for tomorrow.*
Appointments – Yesterday	*Shows the appointments by status for yesterday.*
Appointments by Status	*Shows individual appointment information grouped by status and location.*
Appointments by Status (Next 7 Days)	*Shows the number of pending and complete appointments for the next 7 days.*
Appointments by Status (This Week)	*Shows the number of pending and complete appointments for this week.*
Appointments Cancelled	*Shows the appointments cancelled with patient details per clinic.*
Appointments Completed	*Shows the appointments completed with patient details per clinic.*
Appointments Pending	*Shows the appointments pending with patient details per clinic.*
Appointments Pending Breakdown	*Show pending appointments breakdown.*
Appointments with Accommodation Needs	*Shows the patients that need accommodation needs.*
Breakdown by Age Group	*Shows appointments by age group.*
Breakdown by Occupation Industry	*Shows appointments by industry.*
Breakdown by Racial Background	*Shows appointments by racial background.*
Clinic Capacity	*Shows the maximum number of appointments for each weekday for the clinic.*
Daily Appointment Report	*Shows daily appointments.*
ESL Speaker Report	*Shows appointments for Patients whose primary language is not English.*
Group Scheduling Report	*Shows group size per appointment and aggregated total.*
Hourly No-Show Report	*Show no-shows in a report.*
Hourly Pending Appointments Report	*Shows appointments for the day by the hour that are pending.*
Hourly Traffic Report	*Shows appointments for the day by the hour.*
Hourly Vaccinations Report	*Show pending appointments breakdown by the hour.*
No-Shows Reports	*Shows number of no-shows per day per clinic.*
Open Sites Report	*Shows the open clinics for the day.*
Patient Export Report	*Shows patient details for each appointment per clinic.*
Vaccine Administered, Pending Status Report	*Shows appointments in pending complete.*
Walk-In Appointment Report (for extract)	*Shows number of walk-ins per day with patient details.*
Flu Minor Consent Report	*Shows minor consent data from the previous 4 weeks*
Flu Vaccination Appointments	*Shows patient information for individuals receiving the influenza vaccination*

Access and Run Reports

1.	From the **Homepage**, select the **More** drop list from the My Turn Clinic toolbar, then select **Reports** from the drop-down menu.
2.	Select the **All-Folders** menu located under the **Reports** folder on the left-hand side under the **Folders** section.
3.	Find and select the **My Turn Clinic Reports** folder in the **Name** column.
4.	To run a report, select the down arrow on the right-hand side of the desired report's row and click the **Run** button.
5.	To the right of the generated report, select the **Search report table(search icon)** button. The Search bar displays. Enter the information you are seeking in the search bar and if it is in the table, the desired information will highlight in yellow in the table.
6.	Select the **Toggle chart** button to switch the table view to a chart and showcase the information visually.
7.	Select the **Filters** button to apply filters to the data (see next page for more information).
8.	Select the **Refresh** button to update the data contained in the report to the present time.
9.	Select the **Export** button to export the report (see Exporting Reports for an alternative way to export a report).
10.	Detailed reports can be viewed by selecting the drop-down arrow next to a column name, and selecting **Make a Detail Column**, which will break down the data further and allow the user to view more fields.

Note: The first time you run a report, you may encounter the page loading for about a minute – this is because the query is being sent for the first time and should improve for the next times you run that given report.

Filtering Reports

If you'd like to see the above reports based on a set of different filters (e.g., Appointment by Dose and Brand), leverage the **Filters** button located on the top right of each report.

1.	Click on the **funnel icon** to toggle chosen filters.
2.	Edit unlocked filters by clicking on the filter. A panel will display to the left with drop-down menus to apply different filters e.g., start date to adjust the range from All Time to Yesterday.
3.	Click on the **trashcan icon** to get rid of a filter.

Notes:

- Filters may be locked, based on a cut of the information that is requested or the report structure.
- **Flu specific clinic reports** can be generated from the Provider – Patient Export Report by filtering by vaccine type i.e. COVID, flu

Exporting Reports

1.	From the **Homepage**, select the **More** tab, then select **Reports** from the drop-down menu**.**
2.	Select the **All-Folders** tab located under the **Reports** tab on left-hand side under the **Folders** section**.**
3.	Find and select the **My Turn Clinic Reports** folder under the **Name** column.
4.	To export a report, select the down arrow in the column on the right hand-side of the desired report's row and select **Export**.
5.	The **Export** window displays.
6.	Select the **Export View** by selecting **Formatted Report** or **Details Only.**
7.	Select a **Format** for your report using the drop-down menu.
8.	Click on the **Export** button.

Data Fields: Patient Export Report

This standard report includes all the data that a patient provides during the appt. scheduling and vaccination process, including insurance information

1.	From the **Homepage**, select the **More** tab, then select **Reports** from the drop-down menu.
2.	Select the **All-Folders** tab located under the **Reports** tab on left-hand side under the **Folders** section.
3,	Find and select the **My Turn Clinic Reports** folder under the **Name** column.
4.	Select "**Provider - Patient Export Report**" under the **Name** column which allows clinic managers to see patient info to use for operational decision making & analysis.

Note: The following My Turn Data Fields are available:

Person Account

- Critical infrastructure/essential worker
- Gender
- Long term care facility residents
- Person Account: Allergic Reaction to COVID-19 Vaccine
- Person Account: Antibody Therapy
- Person Account: Any Vaccine in 14 days
- Person Account: Aspirin
- Person Account: Birthdate
- Person Account: Blood Transfusion
- Person Account: COVID-19 Dose
- Person Account: Email
- Person Account: Ethnicity
- Person Account: First Name
- Person Account: Group Number
- Person Account: Immune System
- Person Account: Last Name
- Person Account: Mailing Address
- Person Account: Mailing City
- Person Account: Mailing State/Province
- Person Account: Mailing Street
- Person Account: Mailing Zip/Postal Code
- Person Account: Reasonable Accommodation
- Person Account: MRN or Policy Number
- Person Account: Middle Name
- Person Account: Mobile
- Person Account: Pregnant; Health Conditions
- Person Account: Primary Birth
- Person Account: Primary Carrier
- Person Account: Primary Holder
- Person Account: Primary Holder First
- Person Account: Primary Holder Last
- Person Account: Primary Holder Middle
- Person Account: Primary Relationship
- Person Account: Severe Allergic Reaction
- Person Account: Sick Today
- Race
- Tested Positive for COVID In Past 30 Day

Clinic and Appointment

- Account ID
- Adverse Reaction Consent
- Dose Number
- Injection Site
- Job ID
- Job Name
- Last Modified By: Full Name
- Last Modified Date
- Location: Account: Account Name
- Location: Clinic Name
- Route
- Start (appointment time)
- Vaccine Administered Time
- Vaccine Administrator: Full Name
- Vaccine Inventory: Asset Name (has lot #)
- Vaccine Inventory: Brand/Manufacturer
- Vaccine Inventory: Lot
- Vaccine Inventory: Lot Expiration Date
- Vaccine Inventory: NDC Code
- Vaccine Status
- Vaccine: Name
- Vaccine Type

Flu Minor Consent Reports

Minor Consent Information will be routinely deleted from the system **4 weeks after the completion** of an appointment. As a legal requirement of California's Vaccination Program, Providers must **maintain vaccine administration records for a minimum of three years.** To maintain legal compliance, Clinic Managers must download consents weekly from the system **beginning Thursday, October 21, 2021**.

1.	Use the link received in the weekly email reminder to access the clinic portal.
2.	Download the electronic minor consents from the portal. The downloaded minor consents must be kept for a minimum of three years.
3.	From the Homepage, select the **More** tab, then select **Reports** from the drop-down menu.
4.	Type Flu Minor Consent Report into the search menu to the right of the page.
5.	After navigating to the report, click on the **Export** button to the right of the screen. Select an **Export view** and **Format** option and then click the **Export** button. The file will download to your desktop.

Note:

- The minor consent report must be downloaded weekly. The report will show minor consent data from the previous 4 weeks.
- The designated CM responsible for maintain the electronic minor consents and report will be the designated person for sharing the consent information with interested shareholders.