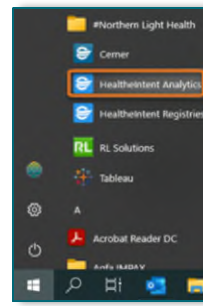
From the Office of Health Informatics

HealtheAnalytics
CareAware Transfer Center Reporting

August 27, 2025

CareAware Transfer Center reporting is accessed through the HealtheIntent Analytics platform. Various reports are available within the Capacity Management – Transfer Center folder to provide data pertaining to cases created within CareAware Transfer Center.

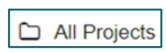
Accessing HealtheIntent Analytics

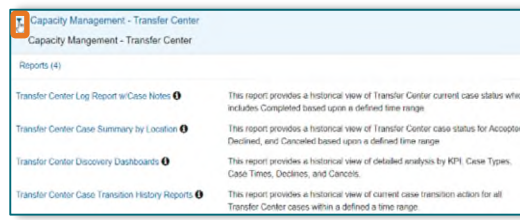


STEP 1: Select the **Windows** start icon in the taskbar. Single-select the **#Northern Light Health** folder to expand the contents, then select **HealtheIntent Analytics**. If prompted to enter login information, enter network credentials to open the HealtheAnalytics home screen.

Depending on the user's permissions, various project folders will display.

STEP 2: Select the **All Projects** folder on the left-side of the screen.

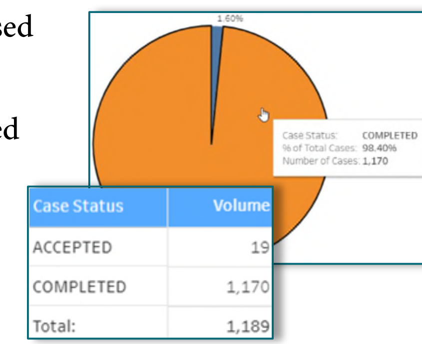




STEP 3: Expand the **Capacity Management – Transfer Center** folder by selecting the carrot.

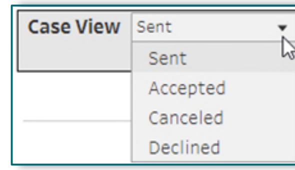
Transfer Center Log Report w/Case Notes

Provides a historical view of current case statuses, including completed cases, based upon a defined timeframe. Additional filters may be applied to specify data.



- **Log Report:** Displays a pie chart displaying accepted, canceled, and completed cases. The table depicts various average durations for a defined date range for KPIs associated to create to accept, accept to complete, and create to complete. The table populates with information based on the applied filters.
  - The **Transfer Case Status** displays the **latest** disposition of the case.
  - Update the **Start Date** and **End Date** to the desired timeframe.
  - Hover over slices of the pie graph to display additional information.
  - The **Case Status** and **Volume table** will populate based on the criteria selected.
- **Transfer Log Detail Report:** Further specifies case details for defined date range defined in Log Report.
  - To view additional data, scroll to the bottom of the report to display the horizontal scroll bar.
- **Detail and Case Notes:** Displays additional case details, including any documented case notes for date range defined in Log Report.
  - Select the **Case Id** number to display the case notes at the bottom of the screen.

Transfer Center Case Summary by Location



Provides a historical view of statuses for Sent, Accepted, Declined, and Canceled cases, based upon a defined facility and date range. Additional filters may be applied to specify data.

- The **Selected Facility** is the sending facility.
- Change the **Case View** filter to display cases of specified statuses.

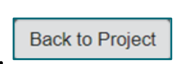
Transfer Center Discovery Dashboards

Provides a historical view of detailed analysis by KPI, Case Types, Case Times, Declines, and Cancels.

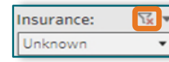
- **Case Summary by KPI:** This view provides volume associated to requests versus completed requests and duration associated to KPIs.
    - Select criteria to specify the data to be displayed.
    - Hover over the bars in the graph to display additional information.
    - The KPI being displayed may be changed by selecting a measure from the drop down.
- **Sending vs. Receiving:** Displays graphics pertaining to volumes of transfers by facility and service.
- **Case Types:** Displays graphics pertaining to the various case types, insurances, and modes of transportation.
- **Case Summary Table:** Provides distinct counts of case statuses.
- **Case Detail:** Provides information related to case statuses.
- **Case Times:** Displays volume data related to case calendar, day of week and hour of day. Hover over graphs to provide additional information.
- **Canceled Cases:** Provides details related to canceled cases and canceling reason.
- **Declined Cases:** Provides details related to declined cases and declining reason.

Transfer Center Case Transition History Reports

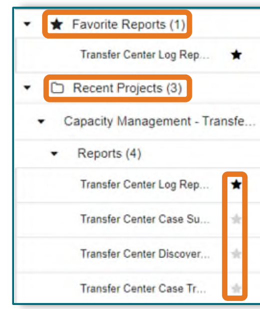
Provides a historical view of current case transition actions for all Transfer Center cases within a defined date range.

- **Transition History:** Provides information related to specific cases and associated personnel actions.
- **Specific Case History:** Enter a **Case ID** number to view the detailed personnel actions.
- After reviewing a report, return to the project folder by selecting the **Back to Project** button. 

- Filters with a red asterisk are required to display report data.



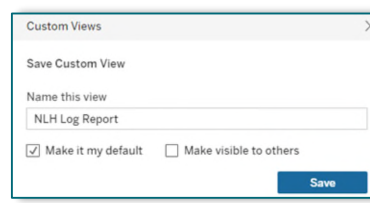
- After selecting the desired filters, select **Apply** at the bottom of the filter.
- To remove a filter, hover over the filter to display the clear filter icon.
- Select the information icon to display information pertaining to the report.
- To undo an action, select the **Undo** button. To redo an action, select the **Redo** button.
- To revert back to default filters, select the **Revert** button.
- To refresh the data being displayed, select the **Refresh** button.
- Recently viewed reports can be located within the **Recent Projects** folder.
- To save a report as a favorite, click the star icon next to the report; these reports will be saved under the **Favorite Reports** folder.



Custom Views

Custom views are created to save commonly used filters.

STEP 1: Once the filters have been applied as desired, select the **View Original** button on the top right of the screen to open the **Custom Views** window.

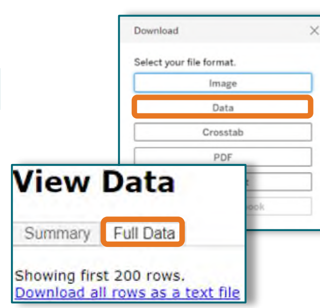


STEP 2: Within the Custom Views window, staff will create a name for the view to be saved under, then select **Save**. To make the view default, check the box next to **Make it my default**.

STEP 3: To toggle between views, select **View: Original** and choose a view from the **My Views** section.

STEP 4: To manage custom views, select **Manage Views** to edit or delete a view.

Saving or Printing Report



STEP 1: Select the **Download** button on the top right of the report.

STEP 2: Choose **Data** as the file format.

STEP 3: The View Data window will open, navigate to the **Full Data** tab, and select **Download all rows as a text file** hyperlink. The data will download as an Excel file that may be saved or printed.

For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please [place a ticket] to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.