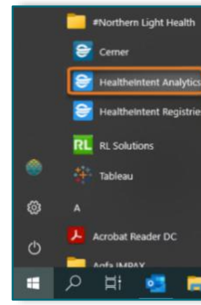
HealtheAnalytics
CareAware Transfer Center Reporting

June 1, 2022

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

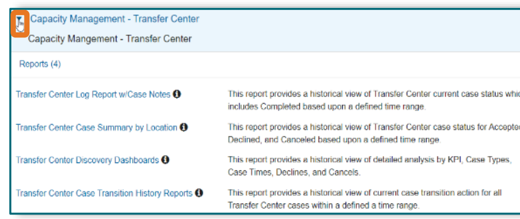


STEP 1: Select the **Windows** start icon in the taskbar. Single-select the **#Northern Light Health** folder to expand the contents, then select **HealtheIntent Analytics**. If prompted to enter login information, enter your network credentials to open the HealtheAnalytics home screen.

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

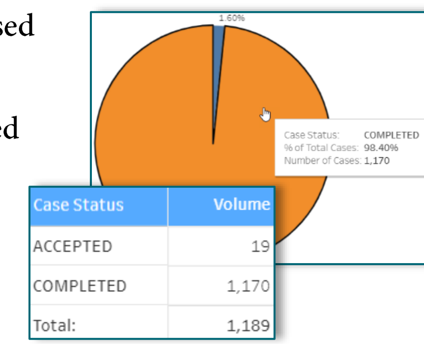
STEP 2: Select the **All Projects** All Projects folder on the left-side of the screen.

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



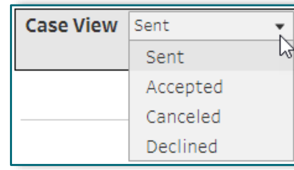
Transfer Center Log Report w/Case Notes

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.

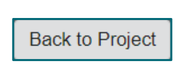
Transfer Center Discovery Dashboards

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

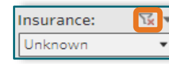
- **Case Summary by KPI**: This view provides volume associated to requests versus completed requests and duration associated to KPIs.
  - Select criteria to specify the data to be displayed.
  - Hover over the bars in the graph to display additional information.
  - The KPI being displayed may be changed 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

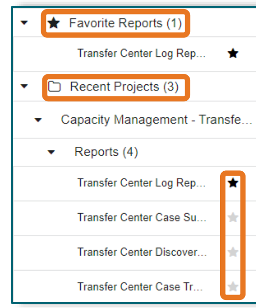
Provides a historical view of current case transition actions for all Transfer Center cases within a defined date range.

- **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.



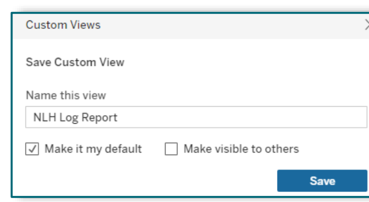
Custom Views

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.

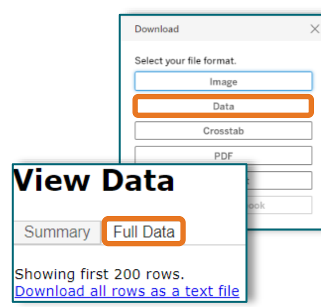
STEP 4: To manage custom views, select **Manage Views** to edit or delete a view.

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 or Clinical Informaticist. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.