Quick Reference Guide: Reports

Purpose

The new Reports Admin selection allows users to generate all transcription and management reports on-demand. Reports were previously generated automatically at set times for defined time frames.

Reports Permissions

There are two reports permissions:

- **Access Reports for Current User**: assign this permission to a typist to give her access only to her own User Performance Current User report.
- **Access Reports Account Wide**: assign this permission to any user who needs to generate any report other than her own User Performance Current User report.

Access Reports

1. Click the Admin Module tool in the Module row.
2. Click the Reports tool in the Admin vertical tool bar.

Generate A Report

1. Select a report from the Report list box.
2. If the report supports a date range, define the From Date and Through Date.
3. Click Download. A message appears to let you know that it takes time to generate the report. DO NOT CLOSE THIS TAB or you will interrupt the process. Open another browser tab if you have other work to do in escribeHOST.
4. You are notified when the report file is finished. You are then prompted to save the report file to your hard drive.

   Note: The default filename uses this format: [date]_[file ID number]_[username]_[report name].csv  Example: 2017-05-10_14-24-27-621_daberdale_active_users.csv

Open A Report

1. Access the saved report and open it in Excel.
2. In Excel, click Data > Text to Columns to convert the .csv file to columns so you can change the sort.

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Report Descriptions

**Active Patients**
Description: List of all patients with a status of "Active" in Demographics when the report is run.
Report Columns: Last Name, First Name, MRN, DOB, Email Address
Availability: All accounts

**Active Patients Count**
Description: Count of all patients with a status of "Active" in Demographics when the report is run
Report Column: Count
Availability: All accounts

**Active Users**
Description: List of all users in the account with the date of their most recent login action
Report Columns: Date of Last Login, Last Name, First Name, Username, Employer Name, Note
Availability: All accounts

**Documents In Progress**
Description: List of all documents with a status of "In Progress" at the time the report is generated
Report Columns: Date Created, Created by Last Name, Created By First Name
Modified By* Last Name, Modified by* First Name, DOS, Patient Last Name, Patient First Name,
Patient MRN, Patient DOB, Physician Last Name, Physician FirstName, Document Type
Availability: All accounts

**Indexing Jobs Count By User By Date**
Previous title: Batch Scan Index Report
Description: Counts of number of pages indexed by each user on each day of the defined date range
Report Columns: Last Name, First Name, Indexing Date, Pages Indexed (number of pages)
Availability: All accounts

**Outside Providers Without Fax Report**
Description: List of all Outside Providers who have no Fax number recorded in their profile
Report Columns: Provider Last Name, Provider First Name, NPI, escribeHOST Provider ID
Availability: All accounts

**Patients Needing Office Visit Report**
Description: List of active patients who have not had an Office Visit in the past 13 months
Report Columns: Last DOS, Patient Last Name, Patient First Name, MRN, DOB, Contact
Preference, Home Phone, Work Phone, Mobile Phone, Email Address
Availability: All accounts

*Modified By references the user who saved the most recent update to the document.
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Report Descriptions (cont.)

**Non-Invasive Procedure Count By Procedure By Provider**
Previous title: Benton Non-Invasive Productivity Report By Examiner
Description: Counts of each type of non-invasive diagnostic report read by Reading Cardiologist (Provider) during the defined date range
Report Columns: Provider Last Name, Provider First Name, Procedure Name, Count
Availability: Limited to accounts with these entry forms: Accelerated Bruce Protocol 2 min, Carotid Dopplers, Holter Monitor, MUGA, Nuclear Stress Test, PVR, Pharmacologic Stress Test, Stress Bruce 3 min, Stress Bruce Modified, Venous Doppler, Transthoracic Echo

**Non-Invasive Procedure Count By Procedure By Provider By Date**
Previous title: Benton Non-Invasive Productivity Report by Examiner
Description: Counts of non-invasive diagnostic reports read by Reading Cardiologist (Provider) by Date during the defined date range
Report Columns: Procedure Date, Provider Last Name, Provider First Name, Procedure Name, Count
Availability: Limited to accounts with these entry forms: Accelerated Bruce Protocol 2 min, Carotid Dopplers, Holter Monitor, MUGA, Nuclear Stress Test, PVR, Pharmacologic Stress Test, Stress Bruce 3 min, Stress Bruce Modified, Venous Doppler, Transthoracic Echo

**Non-Invasive Procedure Count By Referring Physician**
Previous title: Benton Non-Invasive Procedure Productivity Report by Referring Physician
Description: Counts of each type of non-invasive diagnostic report referred by Referring Provider for the defined date range
Report Columns: Referring Physician Last Name, Referring Physician First Name, Procedure Name, Count
Availability: Limited to accounts with these entry forms: Accelerated Bruce Protocol 2 min, Carotid Dopplers, Holter Monitor, MUGA, Nuclear Stress Test, PVR, Pharmacologic Stress Test, Stress Bruce 3 min, Stress Bruce Modified, Venous Doppler, Transthoracic Echo

**Non-Invasive Procedure Count By Referring Physician By Date**
Previous title: Benton Non-Invasive Procedure Productivity Report by Referring Physician
Description: Counts of non-invasive diagnostic reports referred by Referring Physician by Date during the defined date range
Report Columns: Procedure Date, Referring Physician Last Name, Referring Physician First Name, Procedure Name, Count
Availability: Limited to accounts with these entry forms: Accelerated Bruce Protocol 2 min, Carotid Dopplers, Holter Monitor, MUGA, Nuclear Stress Test, PVR, Pharmacologic Stress Test, Stress Bruce 3 min, Stress Bruce Modified, Venous Doppler, Transthoracic Echo

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Report Descriptions (cont.)

**Tasks Created Count By Location**
Previous title: Tasks Created By Office Location And AreaType
Description: Counts of tasks created during the defined date range by Location
Report Columns: Location, Count
Availability: All accounts
NOTE: Tasks with blank Location are included in this report.

**Tasks Created Count By Location by Task Type**
Previous title: Tasks Created By Office Location And AreaType
Description: Count of tasks created during the defined date range by Location by Task Area/Task Type
Report Columns: Location, Task Area, Task Type, Count
Availability: All accounts
NOTE: Tasks with blank Location are included in this report.

**Tasks Created Count By Provider**
Previous title: Tasks Created By Examiner And AreaType
Description: Count of tasks created during the defined date range by Provider
Report Columns: Provider Last Name, Provider First Name, Count
Availability: All accounts
NOTE: Tasks with blank Provider are included in this report.

**Tasks Created Count By Provider By Task Type**
Previous title: Tasks Created By Examiner And AreaType
Description: Count of tasks created during the defined date range by Provider by Task Area/Task Type
Report Columns: Provider Last Name, Provider First Name, Task Area, Task Type, Count
Availability: All accounts
NOTE: Tasks with blank Provider are included in this report.

**Tasks Created Count By User**
Previous title: Tasks Created By User And AreaType
Description: Count of tasks created during the defined date range by User
Report Columns: User Last Name, User First Name, Count
Availability: All accounts

**Tasks Created Count By User By Task Type**
Previous title: Tasks Created By User And AreaType
Description: Count of tasks created during the defined date range by User by Task Area/Task Type
Report Columns: User Last Name, User First Name, Task Area, Task Type, Count
Availability: All accounts
Report Descriptions (cont.)

**Tasks Resolved**  
Previous title: Resolved Detail Report  
Description: List of tasks resolved during the defined date range by patient name with process time (duration between Created Date/Time and Resolved Date/Time)  
Report Columns: Patient Lastname, Patient Firstname, MRN, Date Created, Time Created, Task Area, Task Type, Resolved By User Last Name, Resolved By User First Name, Date Resolved, Time Resolved, Total Process Time  
Availability: All accounts

**Tasks Resolved Count By User**  
Previous title: Tasks Resolved By User and AreaType  
Description: Count of tasks resolved during the defined date range by user with total process time for all resolved tasks  
Report Columns: Resolved By User Last Name, Resolved By User First Name, Count, Process Time  
Availability: All accounts

**Tasks Resolved - Count By User By Task Type**  
Previous title: Tasks Resolved By User and AreaType  
Description: Count of tasks resolved during the defined date range by User by Task Area/Task Type with total process time.  
Report Columns: Resolved By User Lastname, User First Name, Task Area, Task Type, Count, Total Process Time  
Availability: All accounts

**Transitional Care Management**  
Previous title: Transitional Care  
Description: List of all Transitional Care Management Notes created during the defined date range by Discharge Hospital  
Report Columns: Discharge Hospital, DOS, MRN, DOB, Provider Last Name, Provider First Name, Date of Discharge, Follow Up Date, Reason No Followup, Creator  
Availability: Restricted to accounts using the Transitional Care Management Note

**Transitional Care Management Count**  
Description: Count of all Transitional Care Management Notes created during the defined date range  
Report Columns: Count  
Availability: Restricted to accounts using the Transitional Care Management Note
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Report Descriptions (cont.)

**Transitional Care Management Count by Document Creator**
Description: Count of Transitional Care Management Notes created during the defined date range by Creator
Report Columns: Document Creator, Count
Availability: Restricted to accounts using the Transitional Care Management Note

**Transitional Care Management Counts by Hospital**
Description: Count of Transitional Care Management Notes created during the defined date range by Discharge Hospital
Report Columns: Discharge Hospital, Count
Availability: Restricted to accounts using the Transitional Care Management Note

**User Performance Current User**
Previous title: Typist Performance Report - Single Typist
Description: Total line count for the logged in user for the defined date range
Report Columns: Account Name, User Last Name, User First Name, Provider Last Name, Provider First Name, Document Count (created, edited, deleted), Document Lines, Task Lines*, Total
Availability: Restricted to a logged in user with the "Access Reports for Current User" permission

**User Performance All Users Current Account**
Previous title: Typist Performance Report - All Typists in Account
Description: Total line counts for all typists in a single account for the defined date range
Report Columns: Account Name, User Last Name, User First Name, Provider Last Name, Provider First Name, Document Count (created, edited, deleted), Document Lines, Task Lines*, Total Lines
Availability: All accounts; available only a logged in user with the "Access Reports Account Wide" permission

**User Performance All Users All Accounts**
Previous Title: Typist Performance Report - All Typists in All Accounts
Description: Total line counts for all typists in all accounts for the defined date range
Report Columns: Account Name, User Last Name, User First Name, Provider Last Name, Provider First Name, Document Count (created, edited, deleted), Document Lines, Task Lines*, Total
Availability: Restricted to logged in users with Master Administrator permission

*Task Lines = number of Transcription Clarification Tasks created x 2.