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## Clinect Portal Analytics

The analytics section of the portal is where you can view, export and print reports related to your survey data. There are two types of reports, Standard and Custom.

**Standard Reports:** These are the reports that are designed to satisfy basic reporting needs.

**Custom Reports:** These are reports that are customer specific. They may be created by a user applying specific filters and saving as a new report or created by Clinect based on a customer request.

### Standard Reports

Below is a list of the standard reports you will likely see included. Additional custom reports may also be included.

**Survey Summary:** Overall summary of responses and average score by question (excluding comments). This report may be filtered by provider, location and/or question in the report viewer.

**Comments by Provider:** Patient comments are grouped by provider. The comments for each provider are shown on a separate page when viewed in the portal and exported to PDF. Each provider's comments will appear on a separate tab when exported to Excel. This report may be filtered by provider, location and/or question in the report viewer.

**Comments by Location:** Patient comments are grouped by location. The comments for each location are shown on a separate page when viewed in the portal and exported to PDF. Each location's comments will appear on a separate tab when exported to Excel. This report may be filtered by provider, location and/or question in the report viewer.

**Comments by Question:** Patient comments are grouped by question. This report may be filtered by provider, location and/or question in the report viewer.

**Questions by Provider:** Comparison of multiple providers, showing a breakdown of responses and average scores. This report may be filtered by provider, location and/or question in the report viewer.

**Questions by Location:** Comparison of multiple locations, showing a breakdown of responses and average scores. This report may be filtered by provider, location and/or question in the report viewer.



**Trending:** A comparison of multiple months, showing a breakdown of responses and average scores. This report may be filtered by provider, location and/or question in the report viewer.

**Active Provider List:** Shows the list of providers we currently have active within the survey program. It can be used to audit and ensure that surveys are being sent for the appropriate providers.

**NPS by Provider:** This is a standard report for customers who incorporate Net Promoter Scores with their surveys. It shows a breakdown of the NPS by individual provider.

**NPS by Location:** This is a standard report for customers who incorporate Net Promoter Scores with their surveys. It shows a breakdown of the NPS by individual location.

**NPS by Month:** This is a standard report for customers who incorporate Net Promoter Scores with their surveys. It shows a trending of NPS by month.

## Viewing Reports

To export or print a report, you must first generate it in the report viewer. Select the report you want to run and click on the chart icon in the Actions column to the right of the report name. For the data to display, you must set the initial filters.

NAME / DESCRIPTION	ACTIONS
Comments by Location Standard	
Questions by Location Standard	
Survey Summary Standard	

## Report Filters

There are two different places where report filters are applied. One set of filters are applied before the report is generated and the second set of filters is accessible once the report is displayed in the portal.

### Filters Before Report Generates

You will have the ability to apply select filters prior to running the report.

**Survey Name:** Name of the survey you want to view results for.

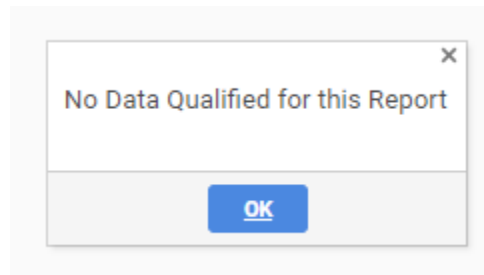
**Date Submitted:** Date range you want to view results for. Please note that the dates reflect when the surveys were submitted by the patient. This may differ from the encounter date and/or date when the survey invitation was sent to the patient.



When you click on the 'View Report' icon, a filter window will appear (see below). Before the report generates you will need to provide the name of the survey you want to view and the date range (the dates are based on when the survey was submitted by the patient). You can change the default date range by clicking on the calendar icon to the right. The *fx* icon to the right of the calendar icon are preset date filters that a user may also utilize. Once the filters are set, click blue OK button.

Filter By	Condition	Value
Comments.Survey name	Equal To	Internal Medicine Visit
Comments.submitted_at	Is Between	2018-01-23 2018-02-22

If you see a message stating 'No Data Qualified for the Report' it may mean that there is a filter field missing a value (most commonly the survey name), or it could be that there are no responses for the selected survey based on the date range and/or other filters entered:



### Filters After Report Generates

You will have the ability to apply additional filters after generating the report.

**Provider:** Name of provider(s) you want to view results for.

**Location:** Name of location(s) you want to view results for.

**Question:** Question(s) you want to view results for.



By default, the report will display information for all providers, all locations and all questions with responses for the selected survey and date range. However, you can filter the data further.

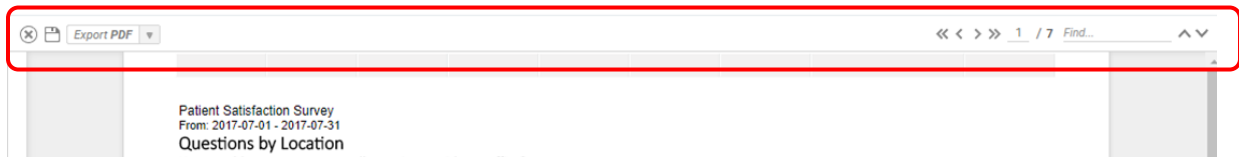
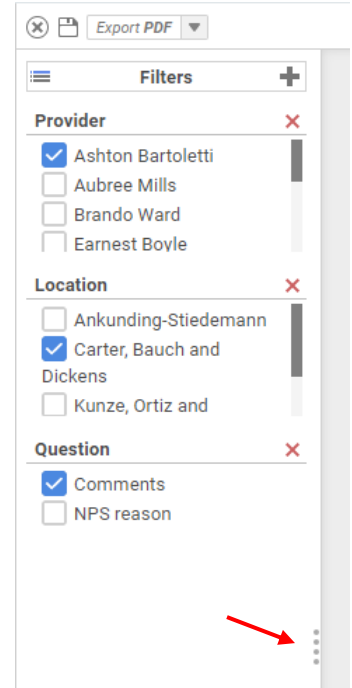
Once the report is generated, the user can click on the four dots to the left to expand the menu and view additional filter options.

These filters are interactive, and the user will see the report actively change on the screen when selections are made (or unmade). Most of the standard reports will include interactive filters for Provider, Location and Question. The user can select any combination of filters. To select a filter, click in the checkbox to the left of the option (a check mark will appear). To remove a filter, click in that same checkbox a second time (the check mark will be removed).

The selection in the top filter selection will drive the options that appear in the sections below. For example, if you select a provider in the top section, the location options in the section below may change to reflect the locations that have data for the provider selected.

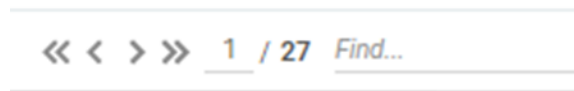
## Report Tool Bar

The tool bar at the top of the report will display the number of pages included. You can use the arrows to navigate to the various pages. You can also use the Find tool to search the report for specific information. The tool bar is also where you will find the options to save and export the reports. To print a report, you must first export it.



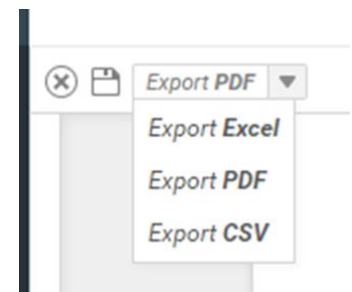
## Report Page Navigation

The numbers indicate which page of the report you are currently on, and the total number of pages included in the report. In the below example, the numbers indicate that you are viewing page 1 out of 27 pages. The double arrows will take you to the first or last page of the report, the single arrows will take you to the next page. You can also type specific words into the Find... section next to be directed to pages within the reports that contains the words you searched for.



## Exporting Reports

You can export the report, retaining any selected filters, by clicking on the Export drop-down and making a selection. The default export option will be displayed, but you can choose a different export option by clicking on the drop-down arrow to the right. The available export options will display in the dropdown. Click on your preferred option. Exporting allows you to save a copy of the report to your files. You will need to export the reports to print them.

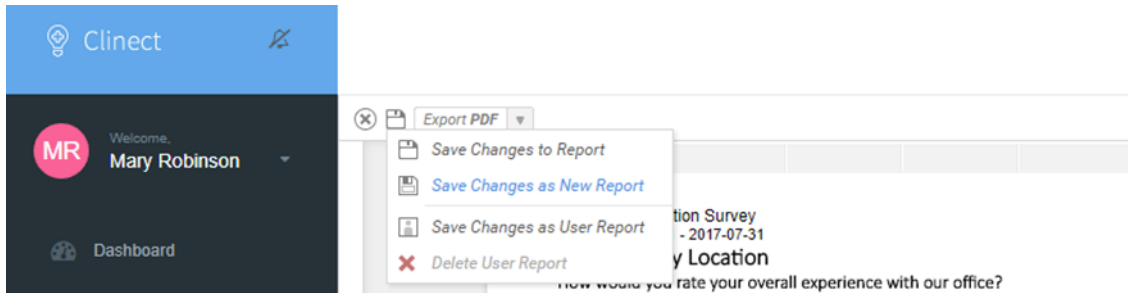




## Saving Reports

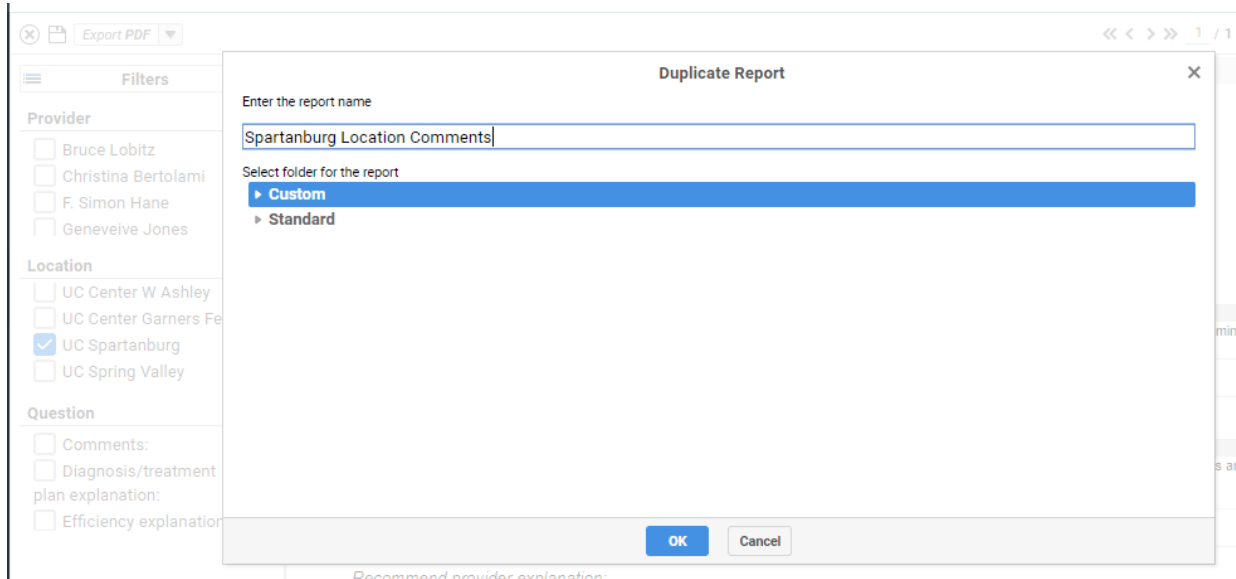
If you would like to save the report with the interactive filters you've applied, click on the floppy disk icon and make the appropriate selection (see below). When saving a report, only the filters applied after the report runs will remain selected, the survey name and date range selected prior to the report generation, will not be saved.

Please Note: Saved changes to existing reports and the creation of new reports will impact the reports for all users who have access to the analytics section of the Clinect portal.



**Save Changes to Report:** This option will overwrite the existing report to reflect any filter changes that have been applied.

**Save Changes as New Report (Recommended Option):** This option allows you to create a new report that will reflect any filter changes that have been applied. You will enter a name for the new report, select the 'Custom' folder, then click the blue OK button.



Your report will appear along with the standard reports in the list of options displayed, but will show 'Custom' instead of 'Standard' under the report name.

