Clerkship Coordinator

E-Value

PxDx Reporting Reference Guide

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(This guide has been adapted from the E-Value User Guide)

These reports can be found by clicking the following path:

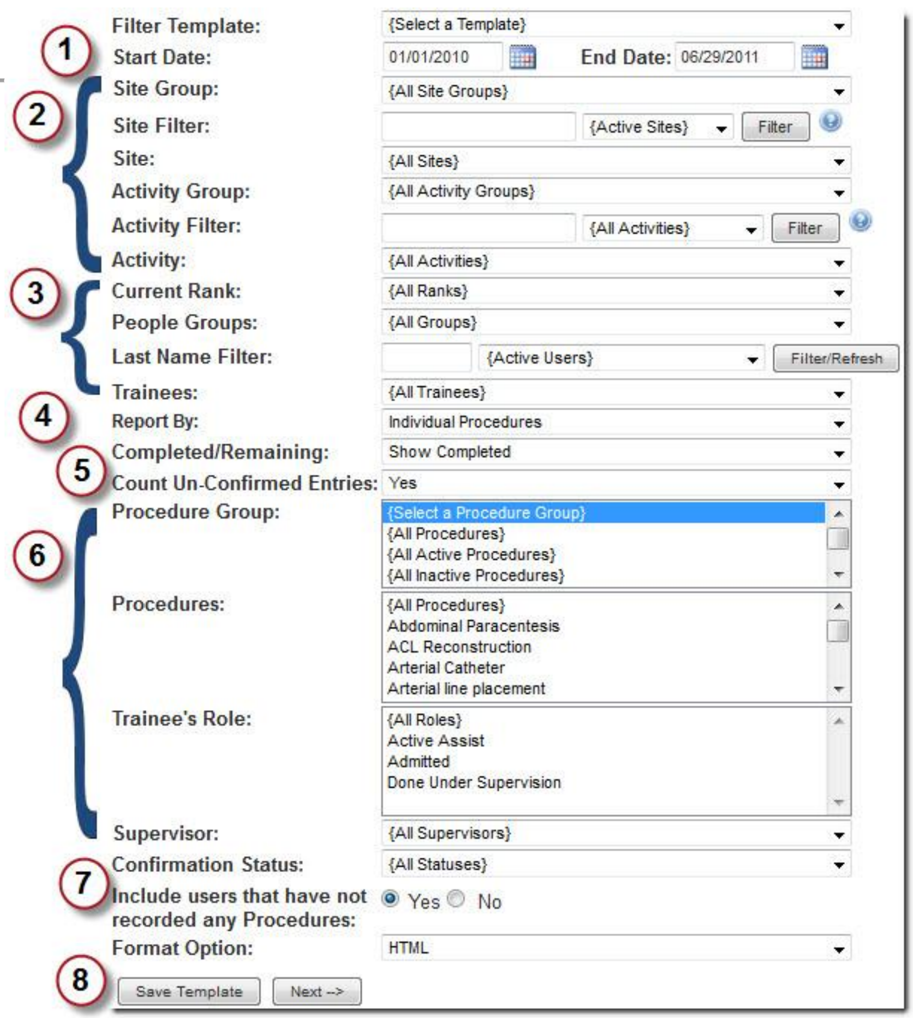
-> Reports -> Crosstab (under either Procedure Reports or Diagnosis Reports

Procedure Crosstab Report

About

The **Procedure Crosstab** report can be used to review the progress trainees have made toward completing the required procedures. Specifically, you can review the number of procedures completed or the number of procedures remaining for each requirement. The report can be generated for individual procedure requirements or group procedure requirements. When reviewing completed entries, you can jump directly to a **Log** report for each requirement.

Results are displayed in a crosstab table of trainees and procedures, with the number of required procedures displaying at the top of the tab. The report can be run for a single trainee or a group of trainees. Additionally, you can filter the reports by: Site, Course and/or Procedure logged. There are several options available for including or excluding entries based on confirmation status.



Generating the Report

Step 1: What is the date range that should be included in the report?

- **Start and End Date:** Select the date range for the entries to be included in the report. Please note, these dates refer to the interaction date logged for the entry, *not* the date that the entry was logged.

Step 2: Should the report be limited to entries logged at a particular Site or for a particular Course?

- **Site:** You can choose to view entries logged at a particular site or at sites included in a particular **Site Group**. You may also filter the Site list by name or active/inactive status.
- **Course:** You can choose to view entries logged for a particular Course or courses included in a particular **Course Group**. You may also filter the Course list by name or active/inactive status.

Step 3: Which trainee or trainees would you like to review?

- **People Groups:** You may filter the list of available trainees by **People Group**, if necessary.

Step 4: Would you like to review requirements by individual procedures(s) or by Procedure Group(s)?

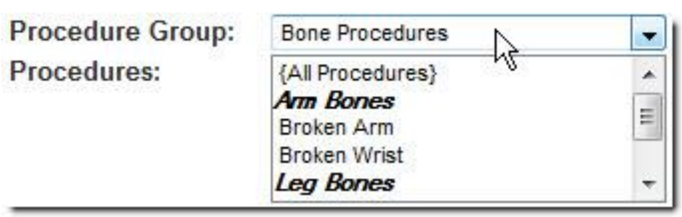
- **Report By:** To review requirements and progress for individual procedures, select *Individual Procedures*; to review group requirements and progress, select Procedure *Groups*.

Step 5: What should be included on the report?

- **Completed/Remaining:** You may generate the report either to display the number of procedures trainees have completed for a requirement or to display the number of procedures trainee have yet to complete in order to meet a requirement.

Step 6: Should the report be limited by the procedure or details logged?

- **Procedure Group:** You may filter the report for a particular **Procedure Group**. The multi-select list below will filter based on your selection.
- **Procedure:** You may filter the report for a particular procedure or procedure(s) using the multi-select list. If your program uses the E*Value option to create groups *and* subgroups, then this list will distinguish the the subgroups with a bold header when a Group containing subgroups is selected above:



- **Trainee's Role:** You may filter the report for entries where the trainee played a particular role in the procedure. Trainees are required to log the role they played in the procedures logged. The available selections are defined on a program-to-program basis by an Administrator.

- **Supervisor:** Programs may require trainees to record the individual who supervised an interaction. If so, you can filter for log entries recorded with a particular supervisor. Please note, the select list will include anyone in your program assigned a Role that is authorized to supervise PxDx entries. The available supervisor Roles can be modified by your Client Service Consultant, if necessary

Step 7: Should the report be limited by user-logging activity?

- **Include users that have not recorded any Procedures:** By default, the report will include all individuals matching your filter criteria, regardless of whether or not they have logged any procedures. However, you can limit the report to only those individuals who have logged procedures.

Step 8: What format should be used to generate it?

- Select the **Format Option** that you would like to use to generate the report and click **Next**.

Report Examples

The example below was generated with the **Report By** *Individual Procedures* option to show *Completed* procedures. You can click the hyperlinks for completed items to jump directly to a **Log report** for those entries.

	ACL Reconstruction	Arterial Catheter	Bone Marrow Biopsy	Broken Ankle	Broken Arm	Skin Biopsy	
Number Required	5	5	5	5	5	5	Total Recorded
Cushing, Harvey	2	2	2	1	1	1	9
Nightengale, Florence	0	0	0	0	0	0	0
Salk, Jonas	3	3	3	3	3	3	18
Walgreen, Charles	0	0	0	0	0	0	0
Totals	5	5	5	4	4	4	27
Avg	1.25	1.25	1.25	1.00	1.00	1.00	6.75

Here is the same report, generated with the option to show the number of *Remaining procedures*:

	ACL Reconstruction	Arterial Catheter	Bone Marrow Biopsy	Broken Ankle	Broken Arm	Skin Biopsy	
Number Required	5	5	5	5	5	5	Total Remaining
Cushing, Harvey	3	3	3	4	4	4	21
Nightengale, Florence	5	5	5	5	5	5	30
Salk, Jonas	2	2	2	2	2	2	12
Walgreen, Charles	5	5	5	5	5	5	30
Totals	15	15	15	16	16	16	93
Avg	3.75	3.75	3.75	4.00	4.00	4.00	23.25

Diagnosis Crosstab Report

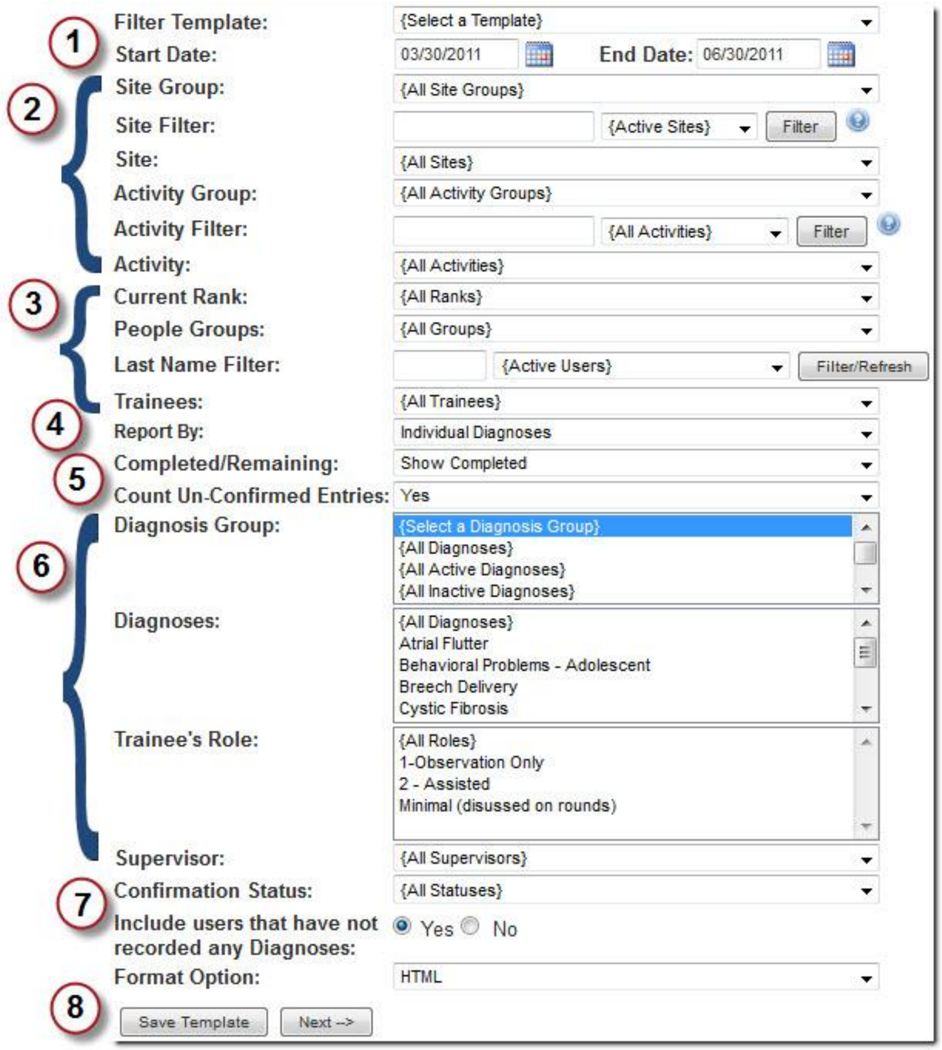
About

The **Diagnosis Crosstab** report can be used to review the progress trainees have made toward completing the required diagnoses. Specifically, you can review the number of diagnoses completed or the number of diagnoses remaining for each requirement. The report can be generated for individual diagnosis requirements or group diagnosis requirements. When reviewing completed entries, you can jump directly to a **Log report** for each requirement.

Results are displayed in a crosstab table of trainees and diagnoses, with the number of required diagnoses displaying at the top of the tab. The report can be run for a single trainee or a group of trainees. .

Generating the Report

Filter for the diagnosis requirements and individuals to be included in the report.



Step 1: What is the date range that should be included in the report?

- **Start and End Date:** Select the date range for the entries to be included in the report. Please note, these dates refer to the interaction date logged for the entry, *not* the date that the entry was logged.

Step 2: Should the report be limited to entries logged at a particular Site or for a particular Course?

- **Site:** You can choose to view entries logged at a particular site or at sites included in a particular **Site Group**. You may also filter the Site list by name or active/inactive status.
- **Course:** You can choose to view entries logged for a particular Course or courses included in a particular **Course Group**. You may also filter the Course list by name or active/inactive status.

Step 3: Which trainee or trainees would you like to review?

Access will be limited based on Role of the individual generating the report. Individual trainees can only generate the report for themselves.

- **People Groups:** You may filter the list of available trainees by **People Group**, if necessary.

Step 4: Would you like to review requirements by individual diagnoses(s) or by Diagnosis Group(s)?

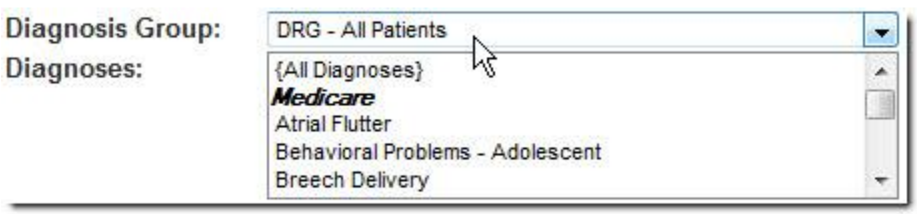
- **Report By:** To review requirements and progress for individual diagnoses, select *Individual Diagnoses*; to review group requirements and progress, select *Diagnosis Groups*.

Step 5: What should be included on the report?

- **Completed/Remaining:** You may generate the report either to display the number of diagnoses trainees have completed for a requirement or to display the number of diagnoses trainee have yet to complete in order to meet a requirement.

Step 6: Should the report be limited by the diagnosis or details logged?

- **Diagnosis Group:** You may filter the report for a particular **Diagnosis Group**. The multi-select list below will filter based on your selection.
- **Diagnosis:** You may filter the report for a particular diagnosis or procedure(s) using the multi-select list. If your program uses the E*Value option to create groups *and* subgroups, then this list will distinguish the subgroups with a bold header when a Group containing subgroups is selected above:



- **Trainee's Role:** You may filter the report for entries where the trainee played a particular role in the diagnosis. Trainees are required to log the role they played in the diagnoses logged. The available selections are defined on a program-to-program basis by an Administrator.
- **Supervisor:** Programs may require trainees to record the individual who supervised an interaction. If so, you can filter for log entries recorded with a particular supervisor. Please note, the select list will include anyone in your program assigned a Role that is authorized to supervise PxDx entries. The available supervisor Roles can be modified by your Client Service Consultant, if necessary

Step 7: Should the report be limited by Confirmation Status or user-logging activity?

- **Include users that have not recorded any Diagnoses:** By default, the report will include all individuals matching your filter criteria, regardless of whether or not they have logged any diagnoses. However, you can limit the report to only those individuals who have logged diagnoses.

Step 8: What format should be used to generate it?

- Select the **Format Option** that you would like to use to generate the report and click **Next**.

Report Examples

The example below was generated with the **Report By** *Individual Diagnoses* option to show *Completed diagnoses*. You can click the hyperlinks for completed items to jump directly to a **Log report** for those entries.

	Atrial Flutter	Breech Delivery	Cystic Fibrosis	Epistaxis	Polycystic Kidney	Renal Failure	
Number Required	5	5	5	5	5	5	Total Recorded
Cushing, Harvey	1	0	1	3	1	0	6
Nightengale, Florence	6	0	0	0	0	0	6
Salk, Jonas	3	2	2	2	2	1	12
Walgreen, Charles	0	0	0	0	0	0	0
Totals	10	2	3	5	3	1	24
Avg	2.50	0.50	0.75	1.25	0.75	0.25	6.00

Here is the same report, generated with the option to show the number of *Remaining diagnoses*:

	Atrial Flutter	Breech Delivery	Cystic Fibrosis	Epistaxis	Polycystic Kidney	Renal Failure	
Number Required	5	5	5	5	5	5	Total Remaining
Cushing, Harvey	4	5	4	2	4	5	24
Nightengale, Florence	0	5	5	5	5	5	25
Salk, Jonas	2	3	3	3	3	4	18
Walgreen, Charles	5	5	5	5	5	5	30
Totals	11	18	17	15	17	19	97
Avg	2.75	4.50	4.25	3.75	4.25	4.75	24.25