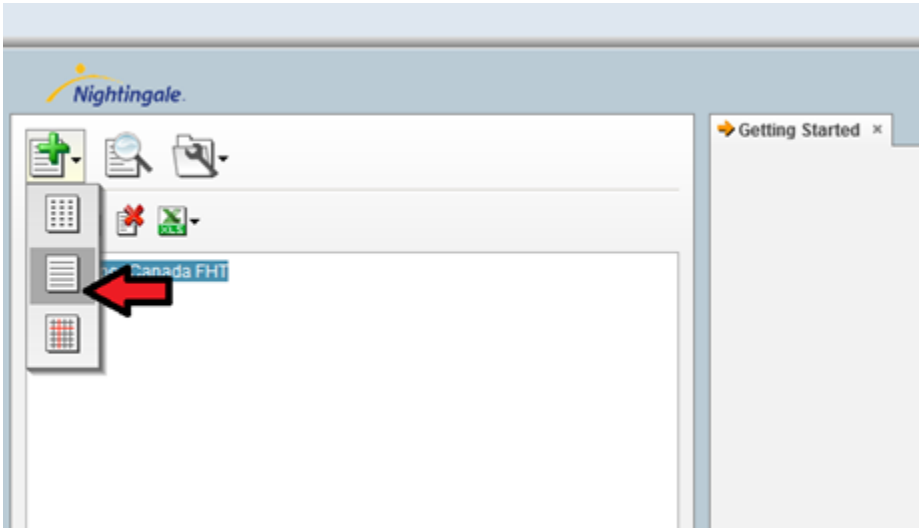
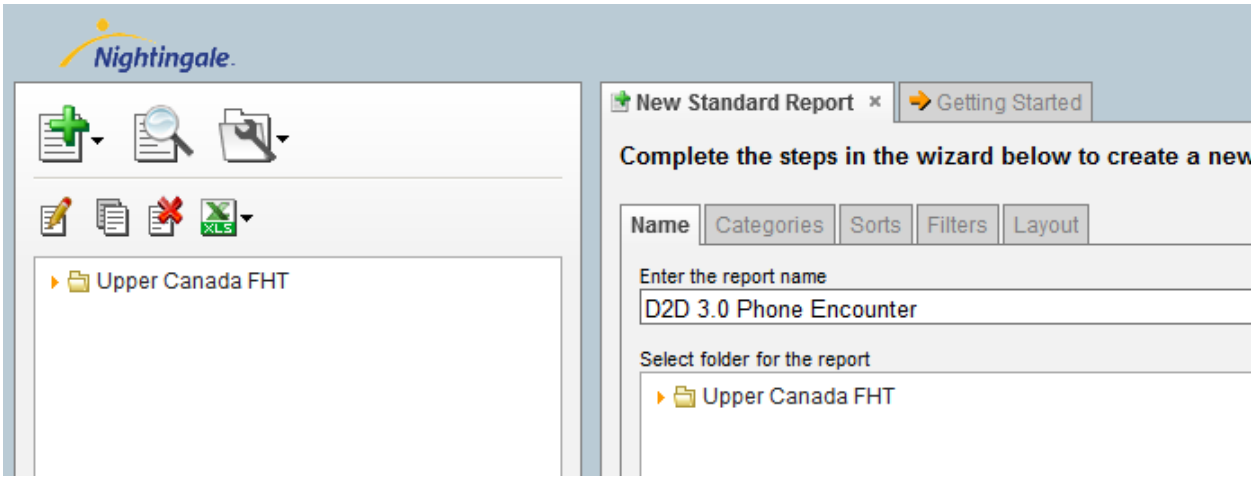
# Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

**AFHTO D2D 4.0 Specific Measurement (Step 1): Number of Phone Encounters within the past 12 months for all members of Team (Physicians, NPs, IHPs, office nurse and/or admin). Remove any phone encounters for providers/users documenting from outside Team**

In Data Miner Module create new Standard Report

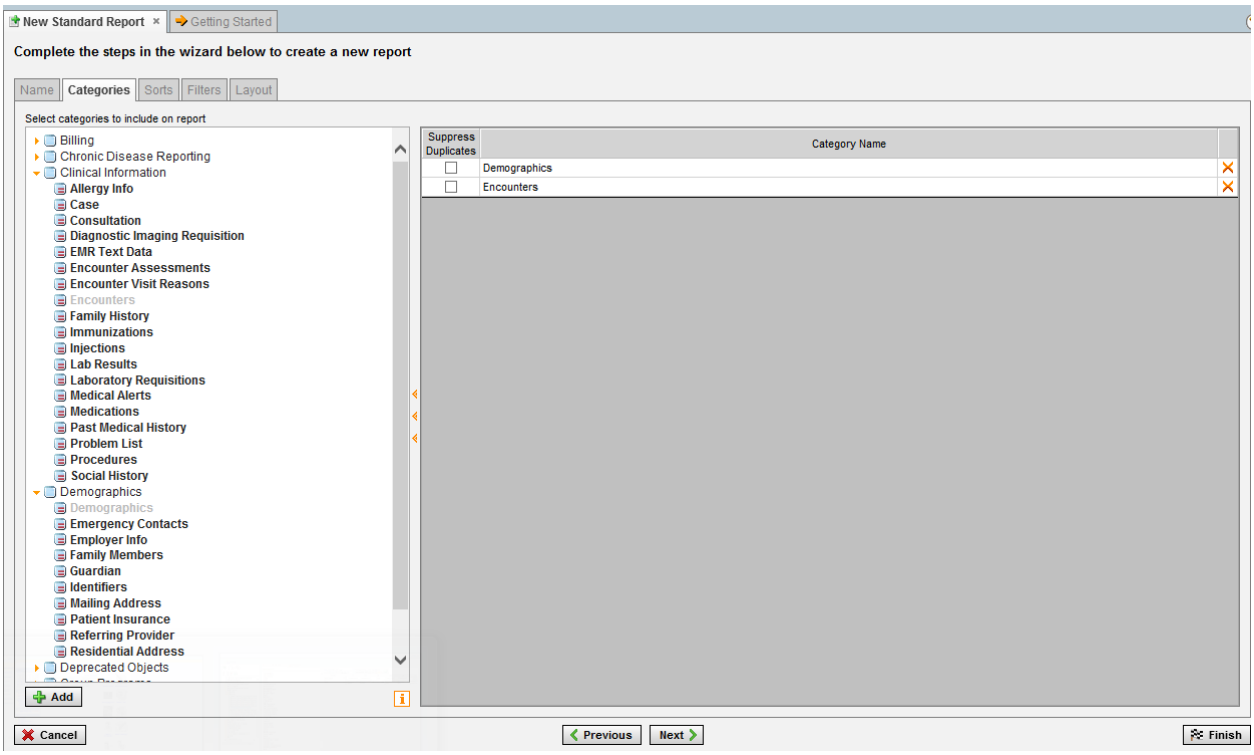



Name your report and file it in required folder and then click Next:



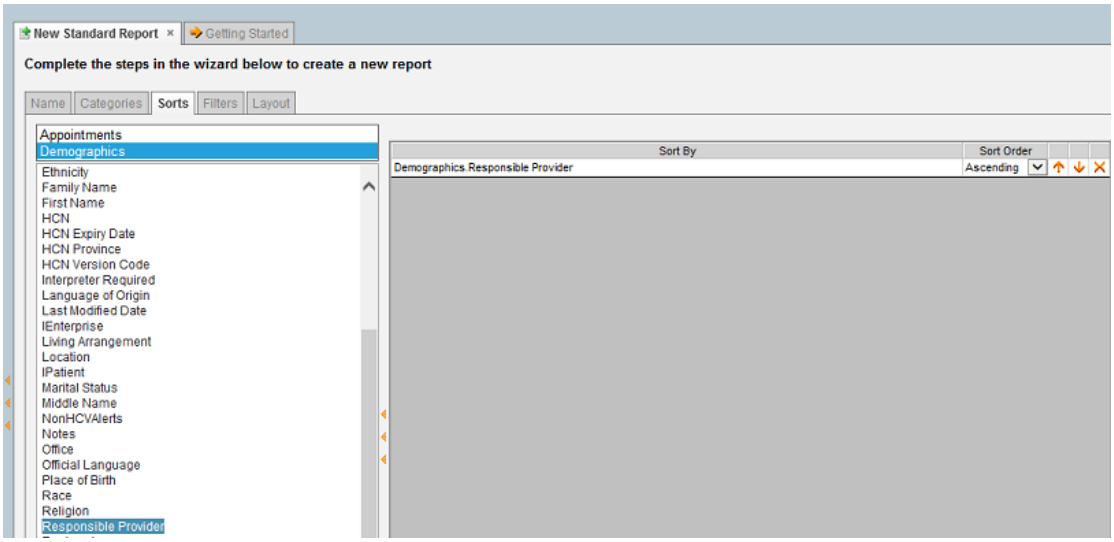
**Categories:** Select (double click or drag and drop the category) and then click Next:

- Demographics → Demographics
- Clinical Information→Encounters




**Sort**: Can sort based on any parameter, in this example we used "Responsible Provider". Select your sort parameter and then click Next.

***NOTE***: We selected Responsible Provider as the sort because we typically review our data per provider and for the entire group. This is an internal practice for Upper Canada FHT and not necessary for D2D.



**Filters**:

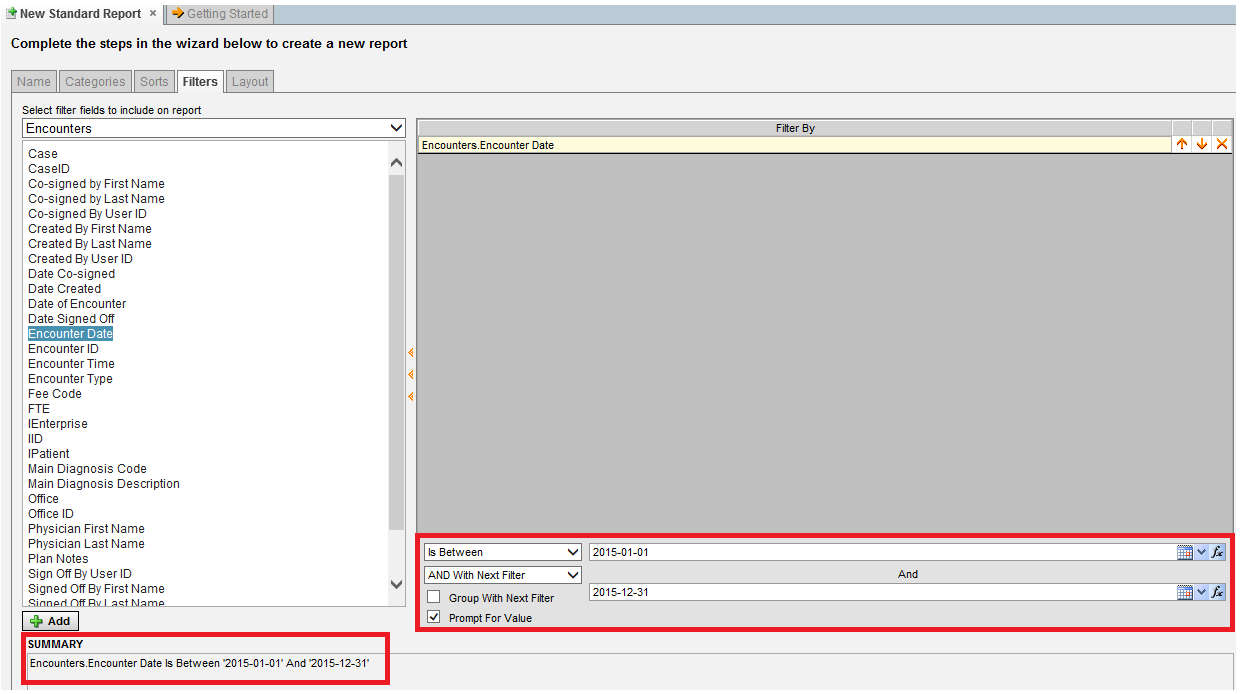
1. Select Encounters from the drop down and then either double click or drag and drop Encounter Date into "Filter By" area.

In the filter details below;

- Change the first drop down to "Is Between"
- Then click on the calendar beside the first date box and select the appropriate start date (oldest date)
- Then click on the calendar beside the second date box and select the appropriate end date (most recent date)

***TIP***: Ensure that the Summary box at the bottom reflects the dates that you have selected. Sometimes when changing the date you need to click in the date box area to "force" the change in the Summary.

***TIP***: If running this report regularly for different date ranges put a check in the "Prompt for Value" so that you don't have to go back into the filters to make changes. When you run the report, it will prompt you to enter the date ranges you want.

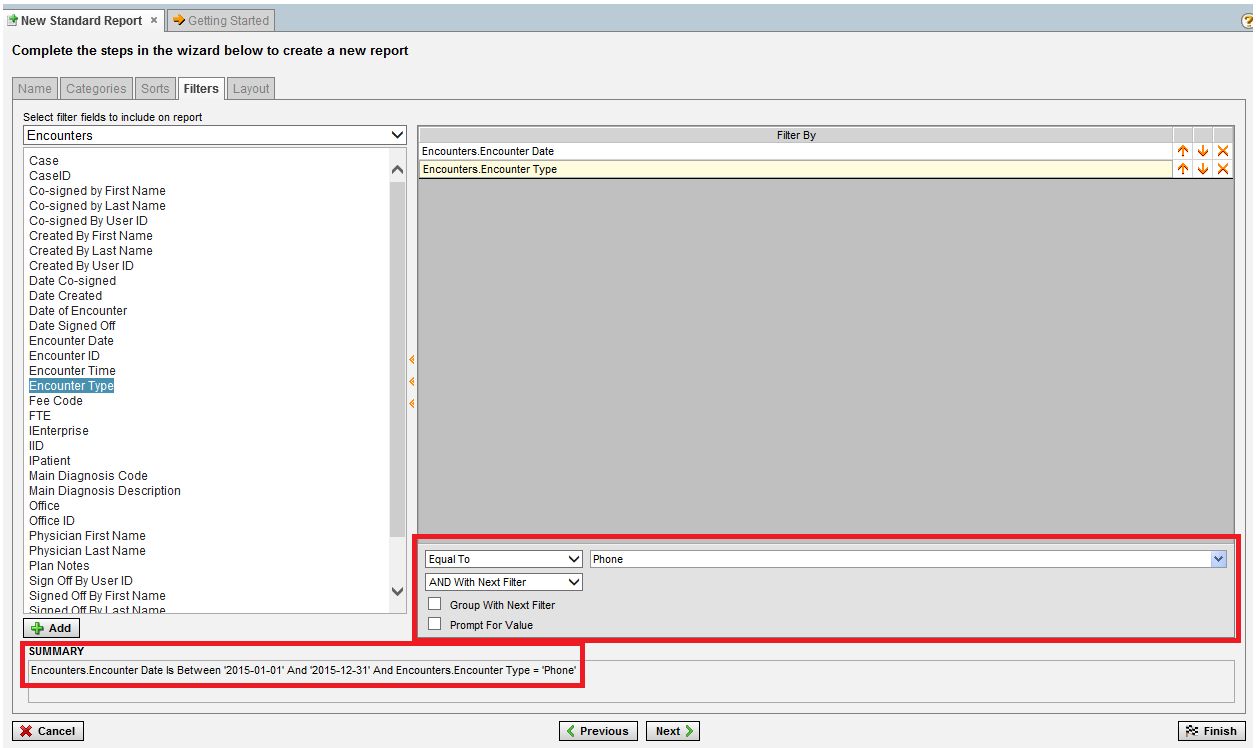



**2.** Select Encounters from the drop down and then either double click or drag and drop Encounter Type into "Filter By" area.

In the filter details below;

- Change the first drop down to "Equal To"
- Then type "Phone" or select phone from the drop down menu

***TIP***: Ensure that the Summary box at the bottom reflects the dates that you have selected. Sometimes when changing the date you need to click in the date box area to "force" the change in the Summary.




**Layout**: Click the drop down (see red arrow below) and select the required category. Either double click or drag and drop the required output fields. For this search we selected the following:

- Demographics
  - Chart Number
  - Chart Status
  - HCN
  - Family Name
  - First Name
  - Responsible Provider
- Encounters
  - Encounter Date
  - Encounter Type
  - Signed Off by Last Name

Once you have selected all of your outputs click Finish in the bottom right corner

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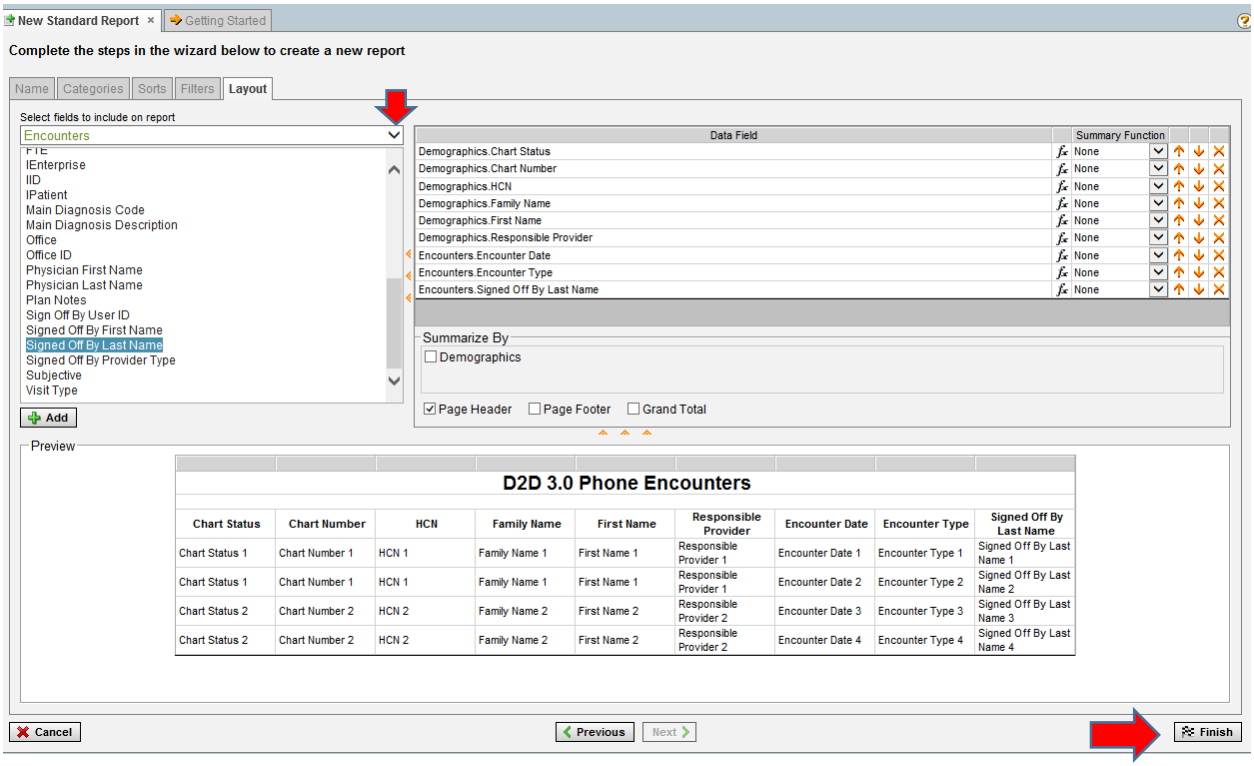
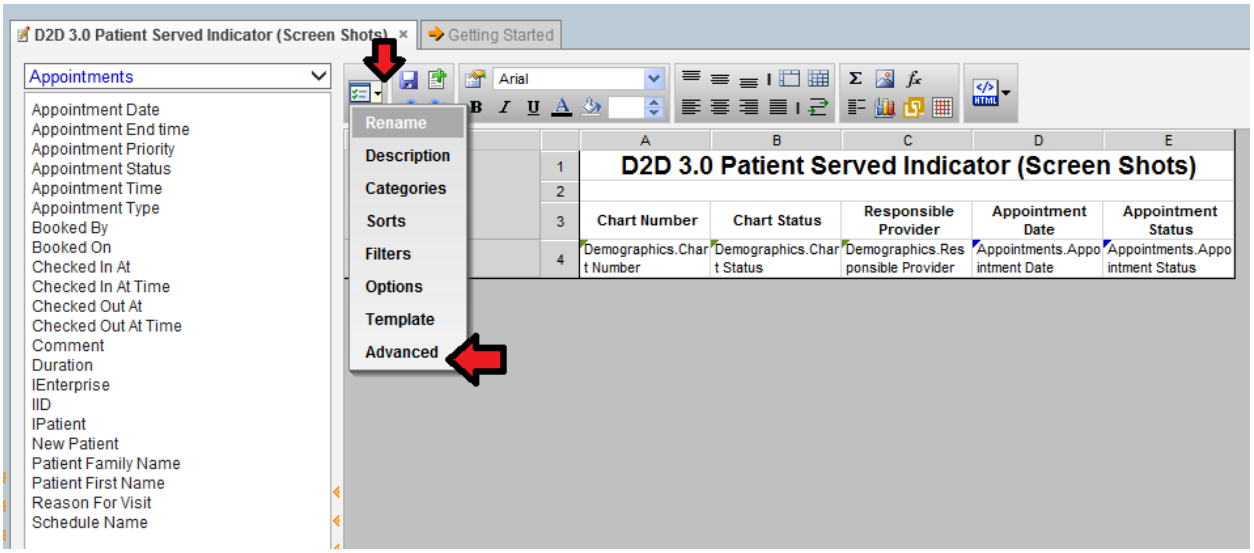
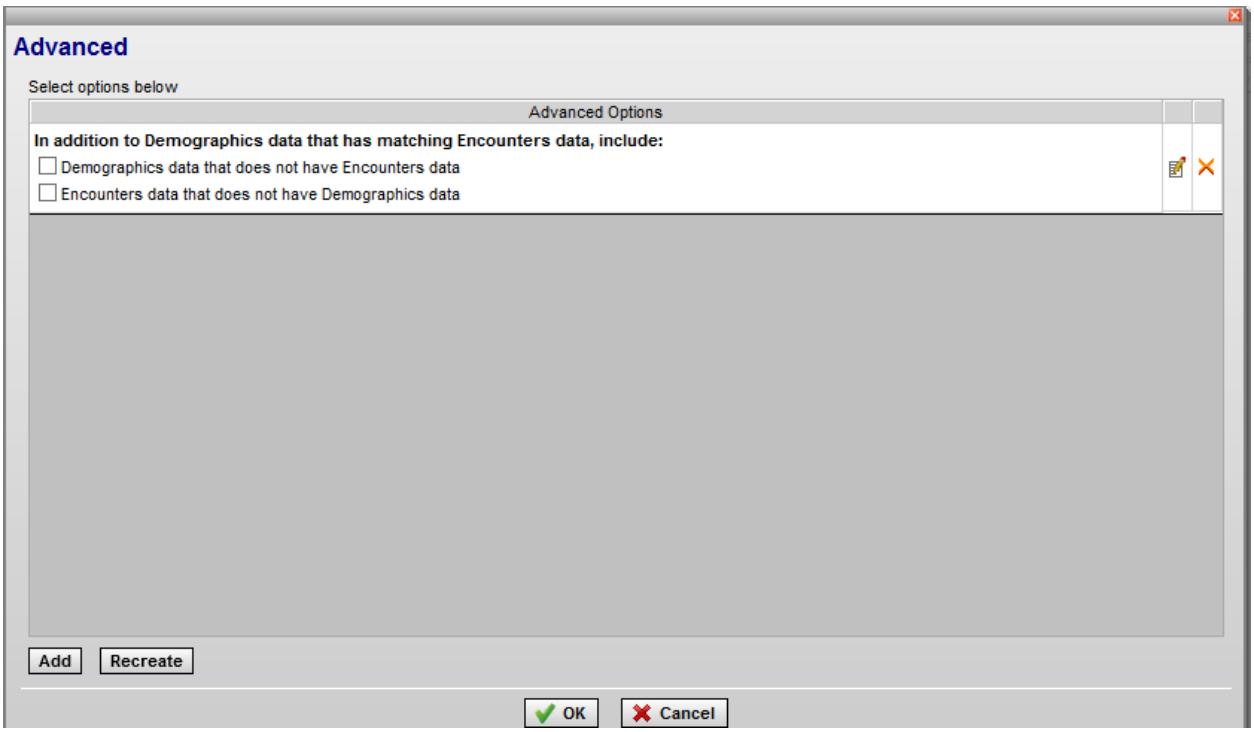



## Additional Settings and Functions:

Click the Drop down on the Report Options icon and select Advanced.



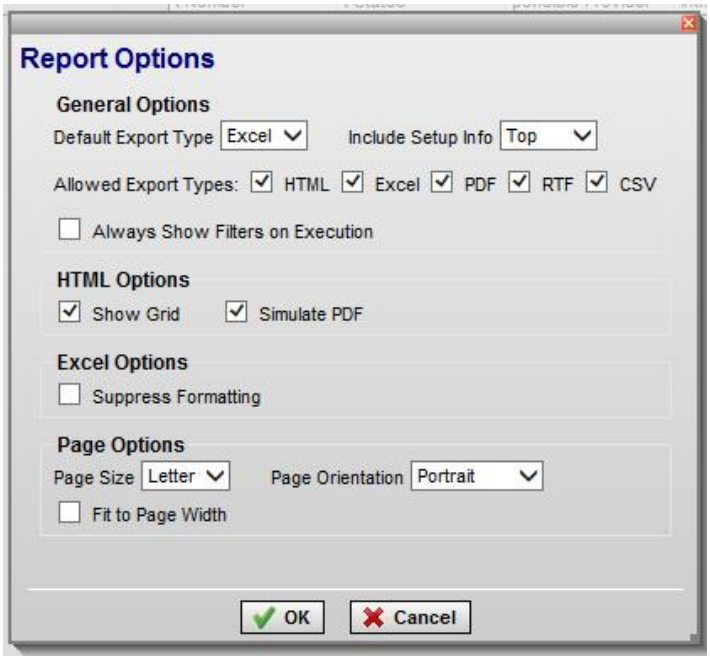

If there are any ticks in either of the boxes below, remove (ensure both boxes are unticked) and then click OK.



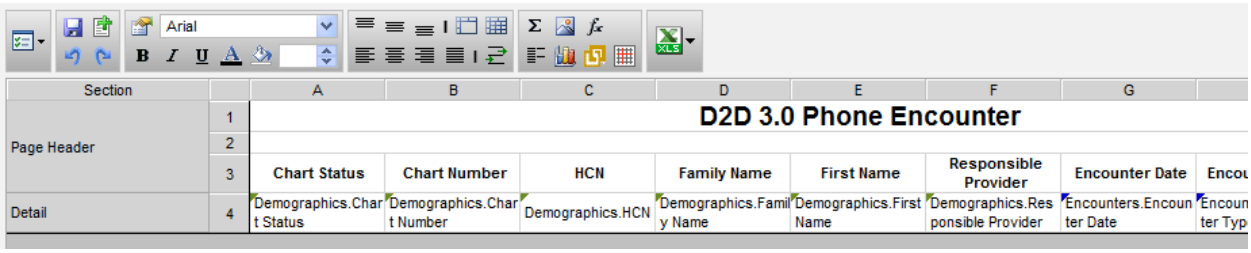

Click the Drop down on the Report options icon and select Options

Change the Default Export Type to “Excel” and Include Setup Info to “Top” and then click OK

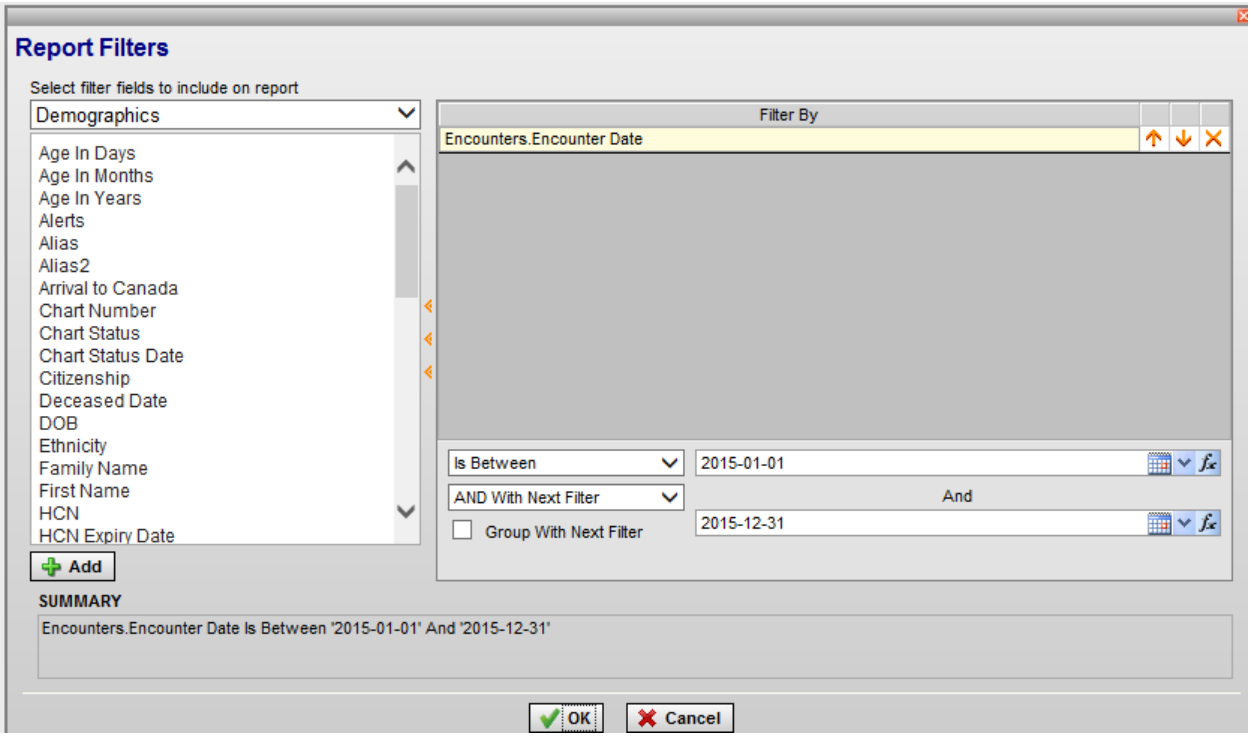
***TIP:*** If you want the Export Type in something other than Excel either leave this option blank or select the appropriate type (Options are HTML, XLS, RTF and CSV).



Click the Save icon to save the report. When complete click the Excel icon to run the report.




The Report filters that were set to "Prompt for Value" will pop up. Update date range appropriately and click OK.




Depending on this size of your database the report may take a few minutes to process. Once the report is done there will be a prompt to Open or Save, click Open. The report will open in Microsoft Excel.

Report in Microsoft Excel:

- Verify the Setup Information is accurate.
- Delete the Setup information if not needed (or move to another sheet for reference).

# Upper Canada FHT – D2D Phone Encounter in Nightingale On Demand

Upper Canada FHT Filters:

- Chart Status
    - Remove any entries for the following Chart Statuses (if applicable):
        - Billing Only
        - OST
        - Test
- Signed Off By Last Name
    - Remove any entries for users that are NOT a part of the FHT (if applicable)

***NOTE:*** Items to remove will be specific to each organization. There are other features and functions within Data Miner to filter out Encounters and Chart Status however in our experience the less you try to ask the report to do the less likely it is to fail. We find it easier to manipulate the data in Microsoft Excel.

The number left should reflect the number of phone encounters completed within the past 12 months.