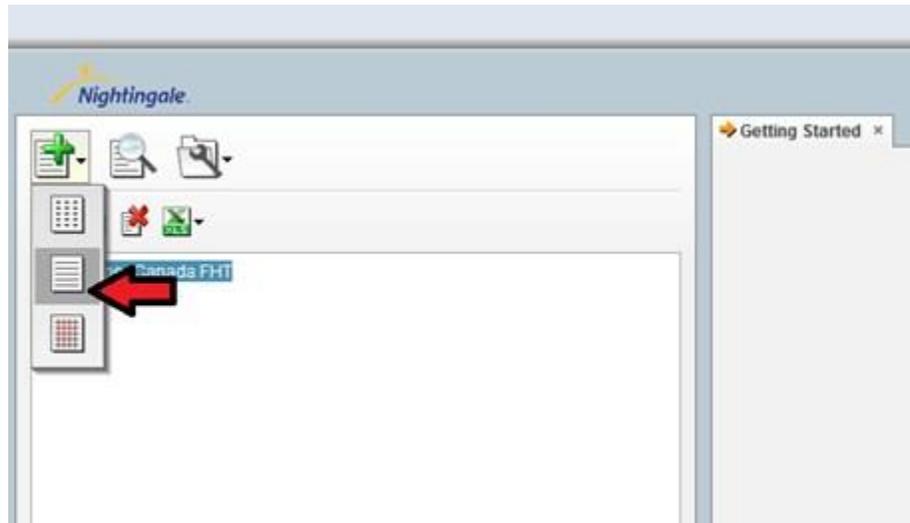# Upper Canada FHT – D2D Patient Served Indicator
in Nightingale On Demand

AFHTO D2D Patient Served: Number of unique patients in the EMR who have had a visit (i.e. appointment) in the past 3 years.

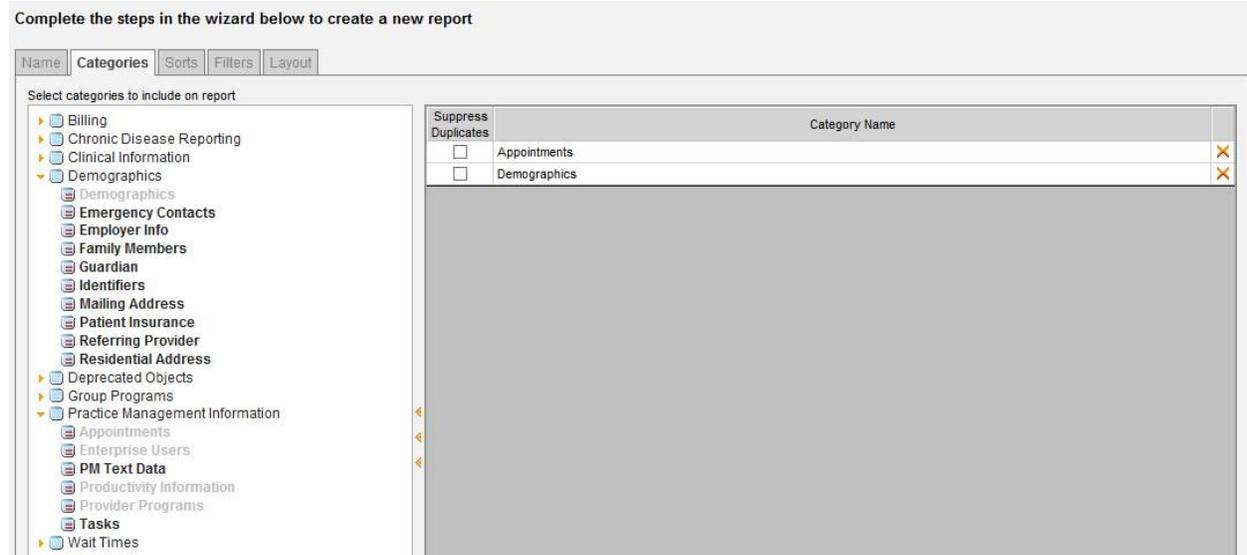In Data Miner Module create new Standard Report

Name your report (Suggested name *D2D Patient Served v1*) and file it in required folder and then click Next:
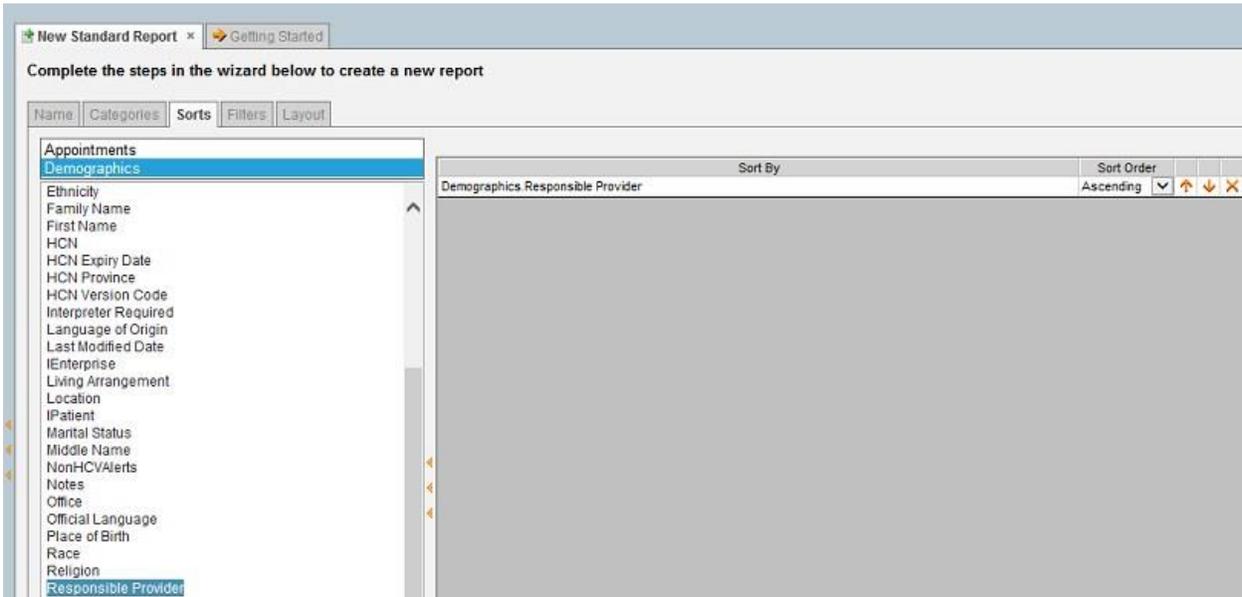
Categories: Select (double click or drag and drop the category) and then click Next:
- Practice Management Information → Appointments
- Demographics → Demographics

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: Select Appointments from the drop down and then either double click or drag and drop Appointment 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.
Then click Next.

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 ○ Responsible Provider
- Appointments ○ Appointment Date ○ Appointment Status

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

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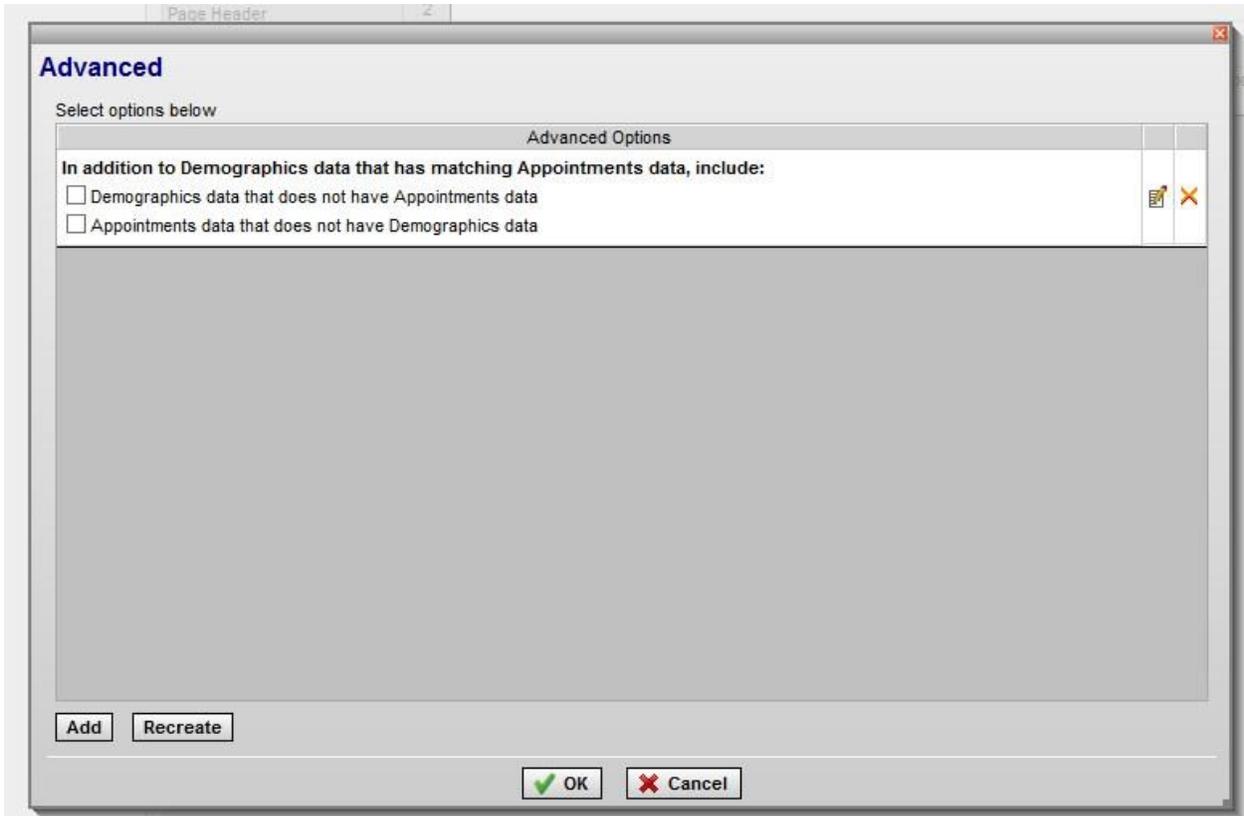
Click the Drop down on the Report options icon and select Options

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).
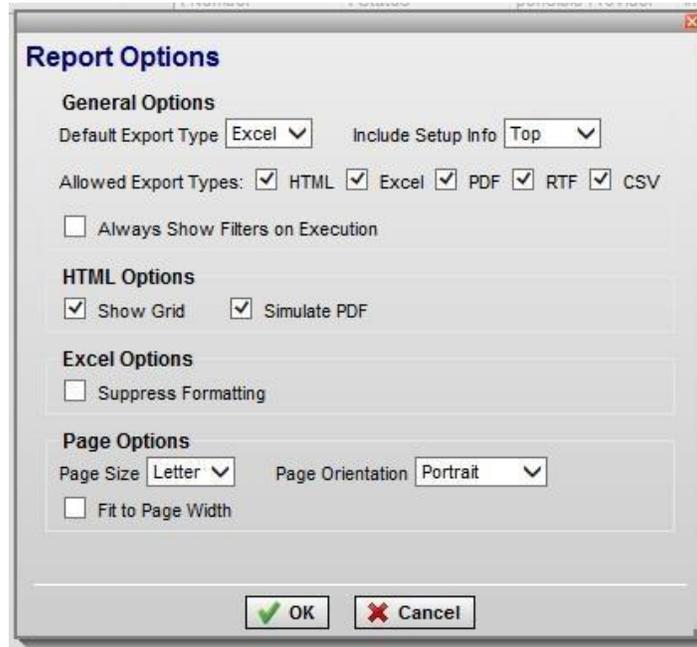
To identify the "Unique Patients":

Click on Detail box, click Add Section and then Group Header.
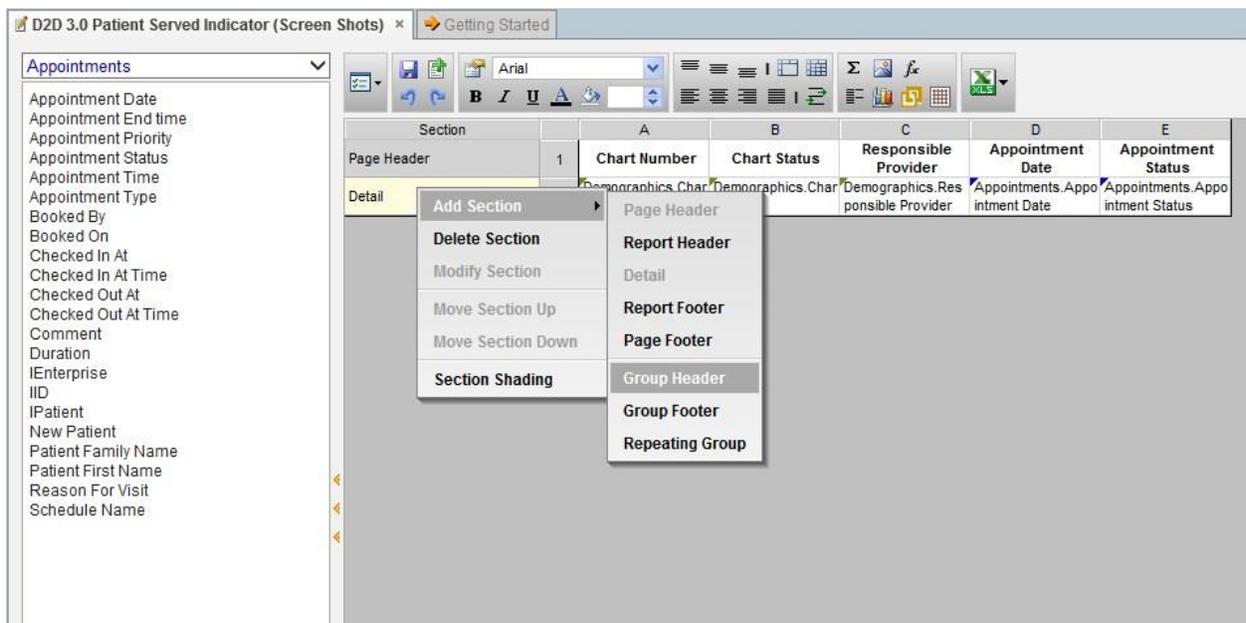
In Group Header box under Data Categories select Demographics and then click OK.

Drag the categories in the Details row to the Header Demographics
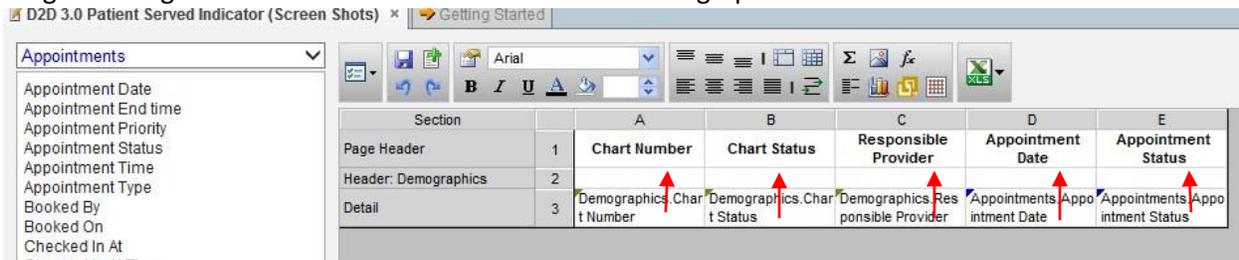
It should look like this:
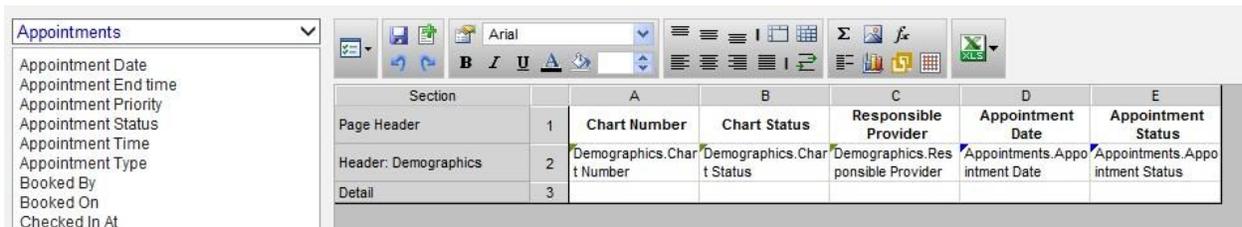
Click on Detail again and select Delete Selection
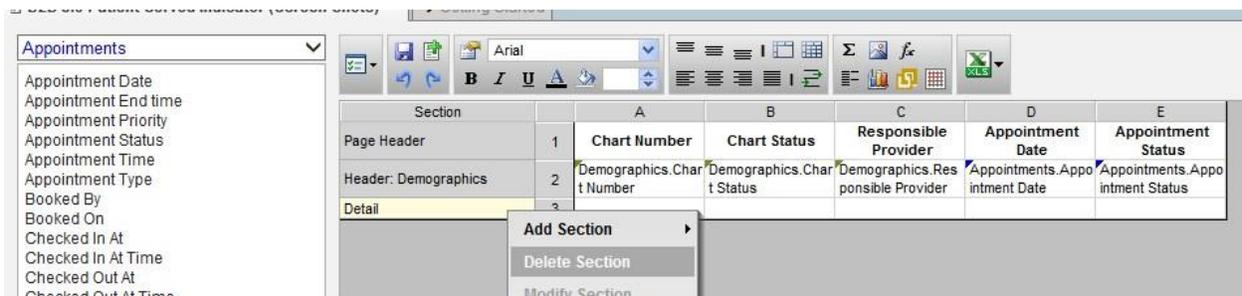
Click the Save icon to save the report. When complete click the Excel icon to run the report.

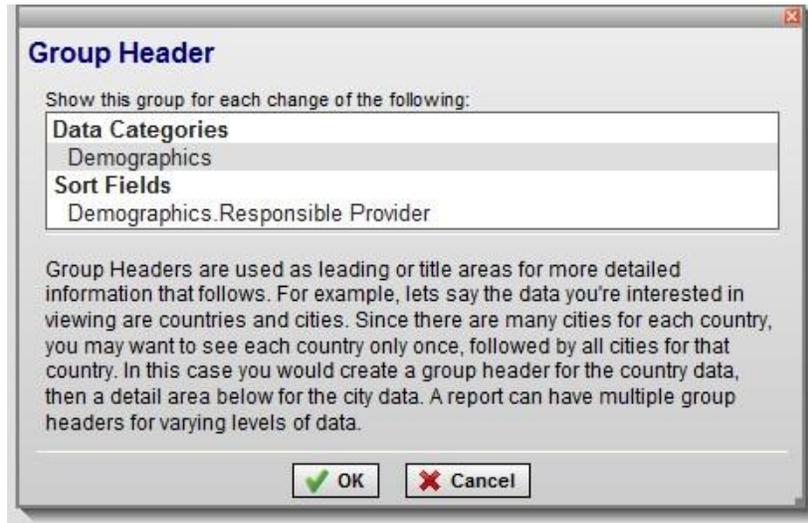The Report filters that were set to "Prompt for Value" will pop up. Update date range appropriately and click OK.

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.
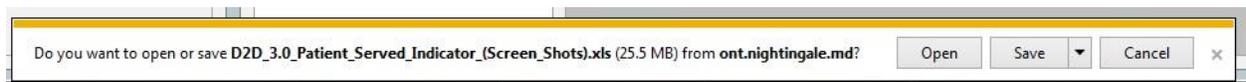
Report in Microsoft Excel:

- Verify the Setup Information is accurate.

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

	A	B	C	D	E	F
1	Chart Number	Chart Status	Responsible Provider	Appointment Date	Appointment Status	
2						
3	**Setup Information**					
4						
5	**Report Categories**					
6	Appointments, Demographics					
7						
8	**Sorts**					
9	Demographics.Responsible Provider Ascending					
10						
11	**Filters**					
12	Appointments.Appointment Date is between '2012-10-01' and '2015-10-01'					
13	UCFHT9233	Chart archived		2013-04-09	Arrived	
14	UCFHT1412	Active		2015-02-06	Auto No Show	
15	UCFHT19171	Active		2013-05-17	No Show	
16	UCFHT54754	InActive		2012-10-16	Arrived	
17	UCFHT38963	Active		2012-11-15	OUT	
18	UCFHT52191	Active		2012-12-18	OUT	
19	UCFHT51562	InActive		2013-01-15	Arrived	
20	UCFHT41078	OST		2015-07-17	OUT	
21	UCFHT34571	Active		2012-10-25	Arrived	
22	UCFHT5942	Deceased		2013-04-19	OUT	
23	UCFHT41684	Active		2014-03-21	OUT	
24	UCFHT49391	Active		2015-01-27	No Show	
25	UCFHT41613	Active		2012-11-06	Auto No Show	
26	UCFHT34672	InActive		2013-02-06	Arrived	
27	UCFHT55136	Active		2013-08-08	Auto No Show	
28	UCFHT26312	Active		2015-10-01	No Show	
29	UCFHT41780	Billing only		2015-08-24	OUT	
30	UCFHT50354	Billing only		2015-08-12	OUT	
31	UCFHT17130	Active		2014-02-07	No Show	
32	UCFHT44850	Active		2013-04-29	OUT	

Upper Canada FHT Filters:

- Appointment Status (All FHT's should filter out no shows) o "No Show" o "Auto No Show"
- Chart Status o Billing Only o OST o Test

NOTE: Items to remove will be specific to each organization. There are other features and functions within Data Miner to filter out Appointment Statuses 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 unique patients in the EMR who have had a visit (i.e. appointment) in the past 3 years.**