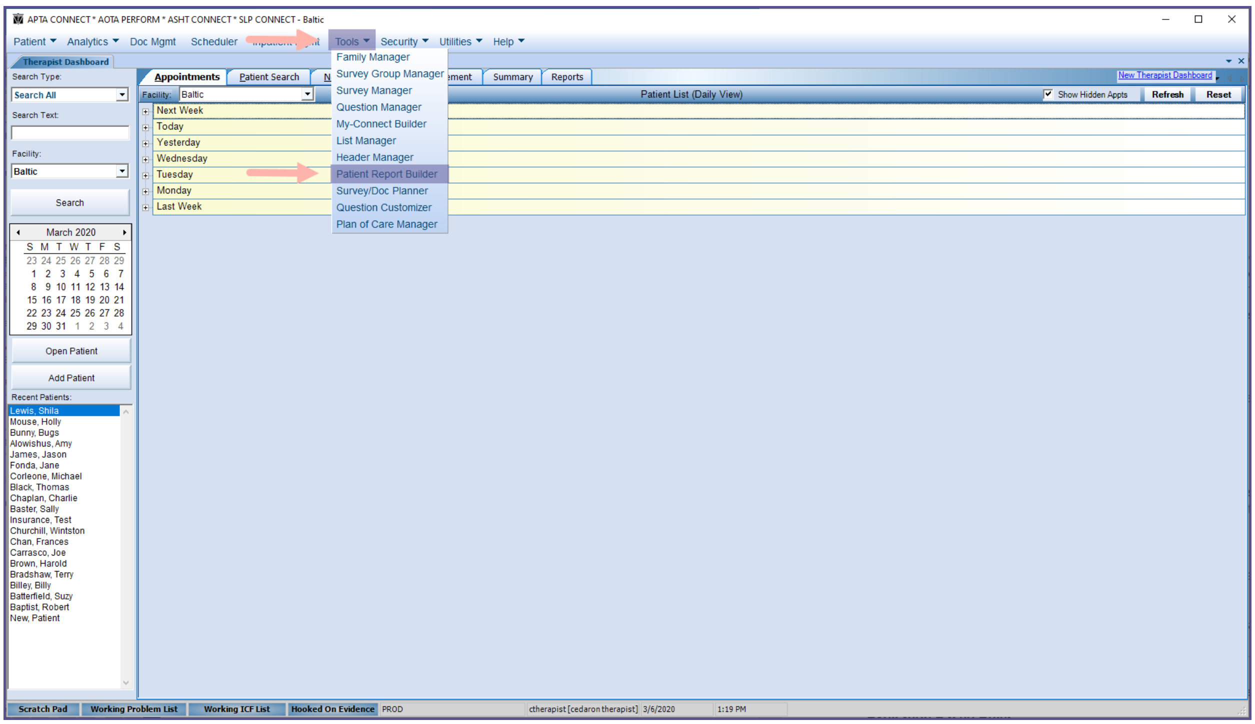
Patient Report Builder

Report builder is a tool that allows users to create customized report templates. The report templates that are created can then be used to generate reports compiling patient data entered in Connect in various surveys and examination forms into one central report.

Connect provides a large number of stock reports that can be used as is or as templates for creating customized reports from.

Accessing Report Builder

To access Report Builder, click on **Tools** in the menu bar at the top of the screen and select **Patient Report Builder**.



A new tab will then open titled Patient Report Builder.

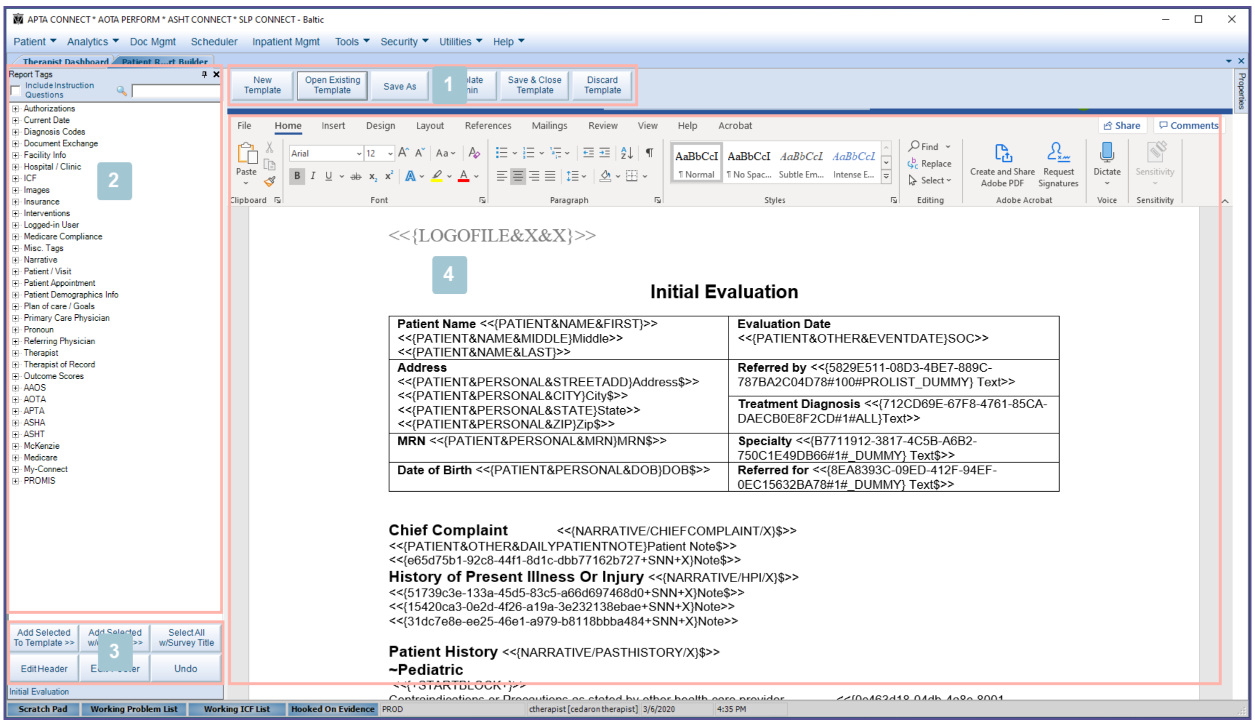
The Patient Report Builder tab has four main sections that we will cover:

1. The templates control menu.
    a. The buttons in this area control opening new and existing templates, saving, closing and discarding reporting templates and Template Admin (this feature is covered at the end of this document).

2. The report tags menu.
    a. Desired questions and information to be on the report will be selected from the report tags menu.

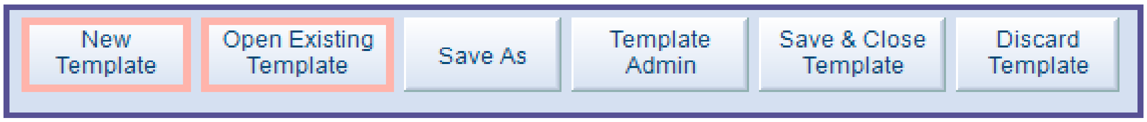
3. The content actions menu.
    a. The buttons in this area control adding selected questions and surveys to the report that is being worked on as well as control editing headers and footers in the report and has a dedicated button to undo changes in the report.

4. The report editing field. This part will be blank until a template is opened.
    a. Patient report builder is integrated with Microsoft Word. Building and editing reports are completed on a Word document within Connect. Users will be able to update and format reports to the same extent that they would for any other Word documents.
    b. For proper functioning, please save and close any other Word documents that you may have open on your computer and make sure that only one user at a time is working on creating/updating reports in Report Builder in Connect.



Creating/Editing Report Templates

Once report builder is open, users can create a completely new template by clicking on **New Template** or work off of an existing template by clicking on **Open Existing Template** in the template controls menu.



We recommend working from an existing template by editing/making updates to the content already created.

With a new template, every piece of information for the report will have to be manually created.

After clicking on **Open Existing Template**, the Open Patient Report window will open.

From this window, users can open the template they want to work from.

- Users can use the search bar to search for specific templates.
- Users can sort the three columns, Template Name, Template Category and Modified Date in ascending or descending order by clicking the column name.
    - Sorting by a descending modified date is the easiest way to find the template that was most recently modified.

Once you find the desired report template, click on the template name to highlight it and then click **OK**.

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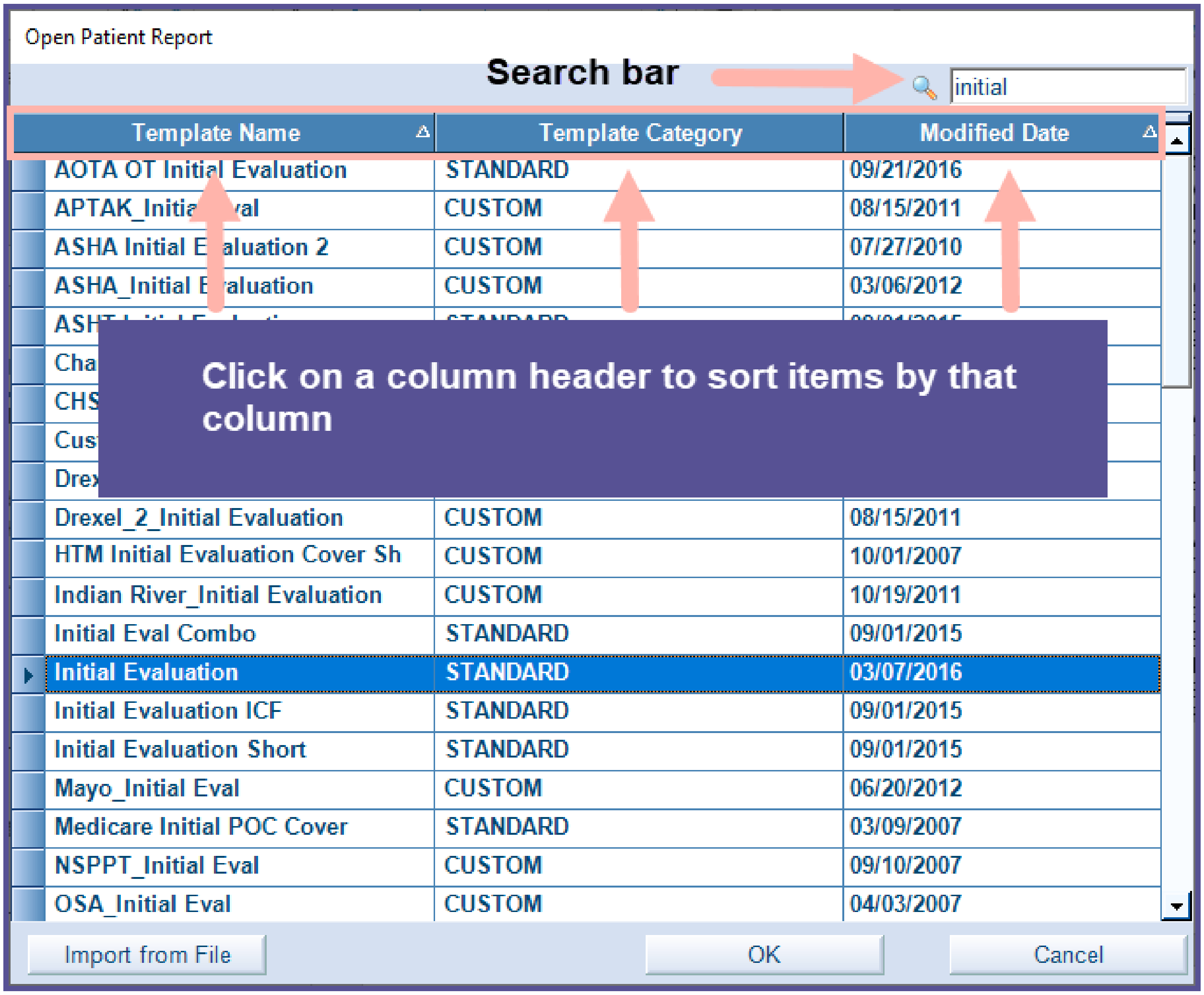


Report Tags and Labels

The report templates are made up of a combination of text labels and data tags.

The labels and tags are added to report templates using the tags menu on the left side of the report builder page.

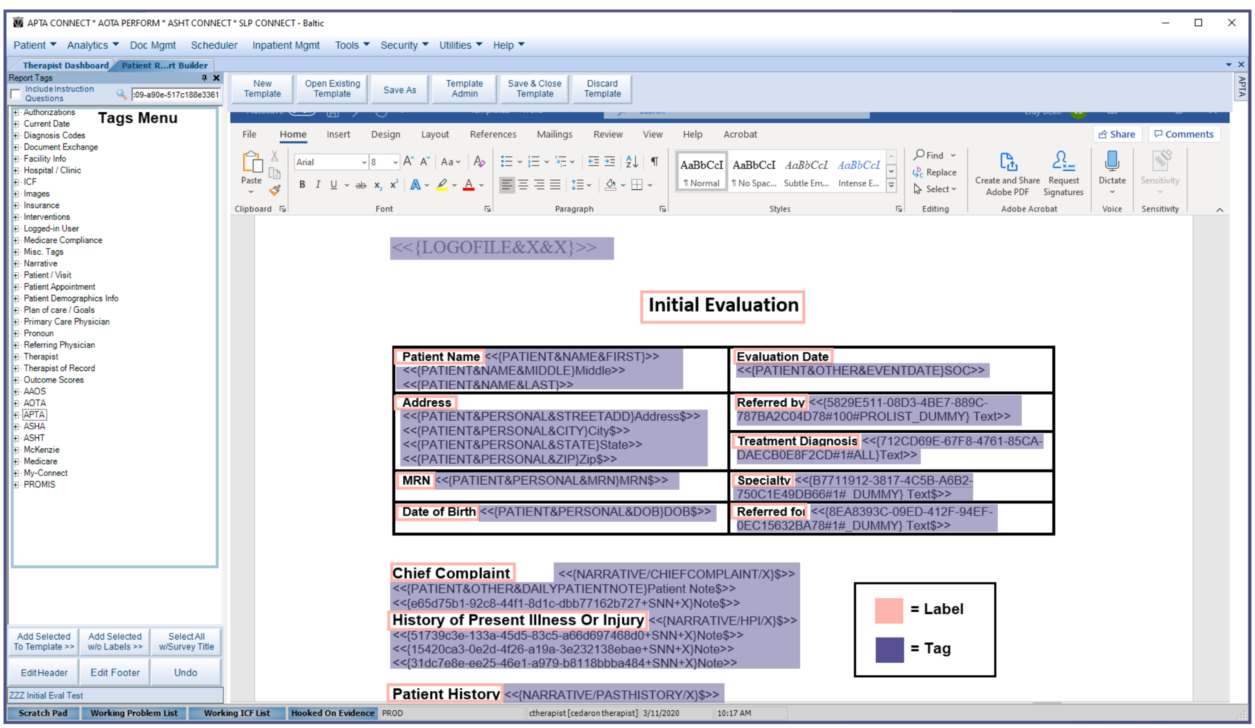
- **Label**: is the tag's name or description, which by default precedes a tag.

- **Tag**: is the string of text beginning and ending with double angle quotes or carets (**<< >>**). The code between the double carets is called a GUID (Globally unique identifier). A GUID represents the location of the data within the survey. If the survey question is answered, the GUID brings the answer onto the report when it is generated; if the question is not answered, then the GUID translates it as a blank space.

  - Examples: **Last Name** <<{PATIENT&NAME&LAST}>>
    - Last Name is the **Label**.
    - <<{PATIENT&NAME&LAST}>> is the **Tag**.

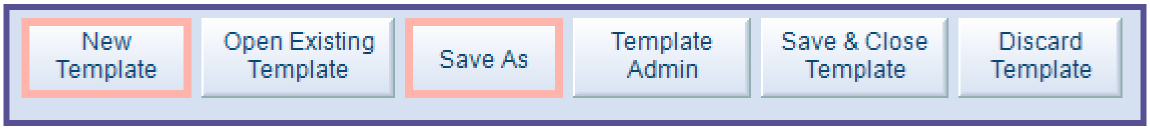
Labels can be edited, renamed, moved and deleted as users desire. For example, a label for Last Name could be changed to Surname.

Tags **CANNOT** be modified in any shape or form. If a tag is accidentally edited, when the user goes to save the report template, there will be an alert and the system will not allow the template to be saved.



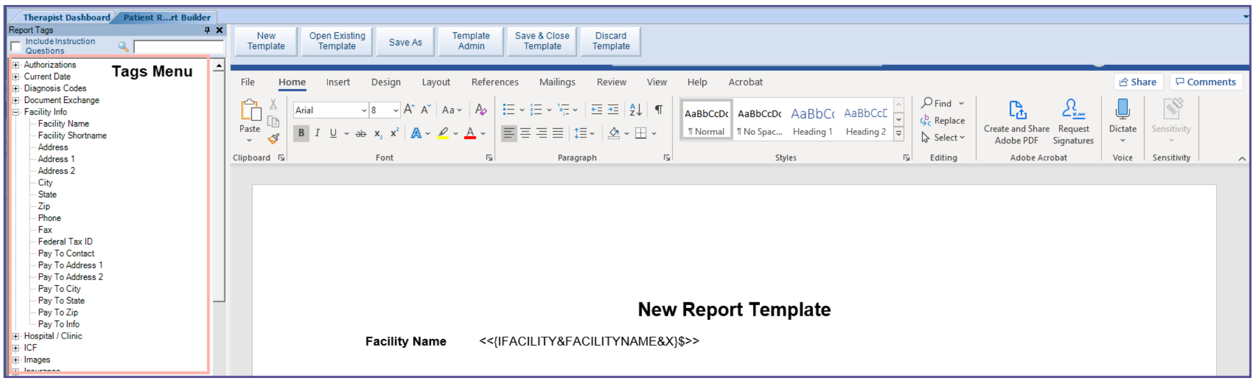
Building/Editing Report Templates

The best way to practice building a report template is to create a 'test report' and try all the Patient Report Builder features.



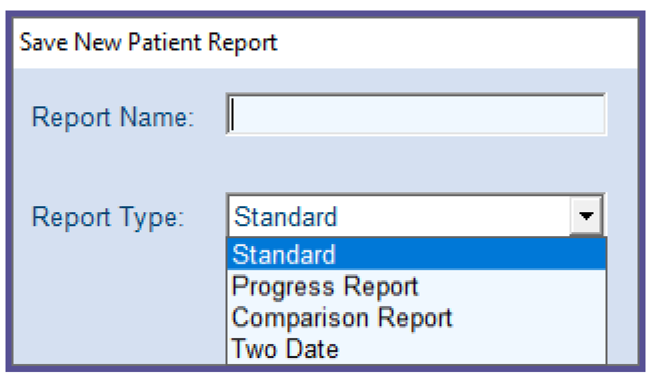
1. Click on the **New Template** button and a blank word document will open.

2. Use the report tags menu on the left side of the screen to customize your report template. This is covered in more detail below.



3. Click on the **Save As** button or on the **Save & Close Template** button. This will prompt you to save the report after entering a Report Name and selecting a Report Type. Name the report something easy to remember, for example, "X's Test Report."

   - There are 4 Report Type options:

     - 

       i. Standard Report: Standard reports pull together data from a patient's current visit. Standard report types are most common and would be used for things such as initial/re-evaluations, visit notes, etc.

       ii. Progress Report: Progress reports display a patient's progress over a selected date range that spans several patient visits. When saving the report, "&&" must be appended to the end of the report name. Connect will automatically add these characters to the report name line once this report type is selected. Do NOT delete these characters from the report name.

iii. <u>Comparison Report</u>: Comparison reports allow users to compare two visits throughout the patient's episode of care, or to run a trend report across all visit dates. When saving the report, "PRG" must be appended to the end of the report name. Connect will automatically add these characters to the report name line once this report type is selected. Do NOT delete these characters from the report name.

iv. <u>Two Date Report</u>: Two date reports allow users to compare a patient's progress between two visit dates. When saving the report, "Two Date" must be appended to the end of the report name. Connect will automatically add these words to the report name line once this report type is selected. Do NOT delete these words from the report name.

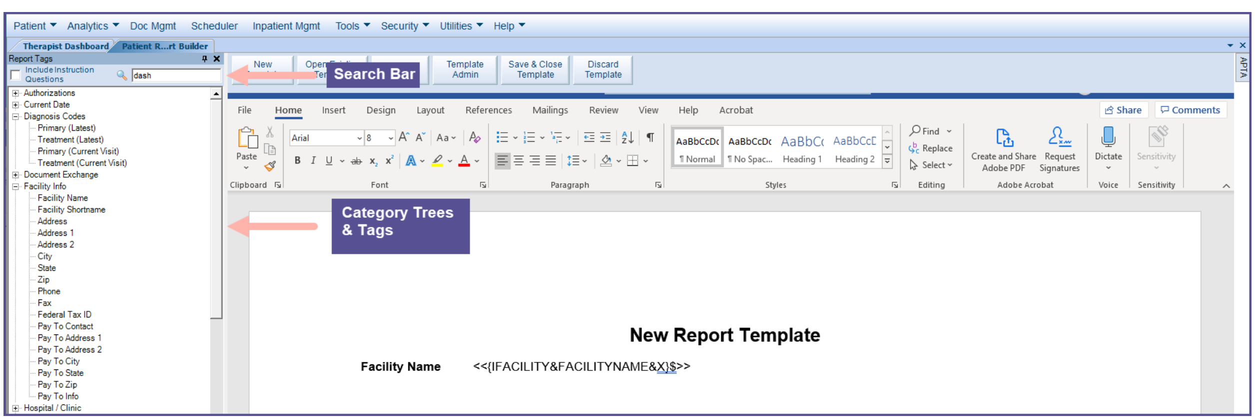
4. After saving, the report template will close. To reopen a template for editing, click **Open Existing Template** and select the desired template from the list.
5. To make changes to an existing template, click **Save & Close Template**.
6. To cancel any changes to a template and to close without saving, click **Discard Template**.

<u>Adding Report Tags</u>

To begin creating and editing reports, the tags corresponding to the information users want to see generated on a report must be added onto the report template.

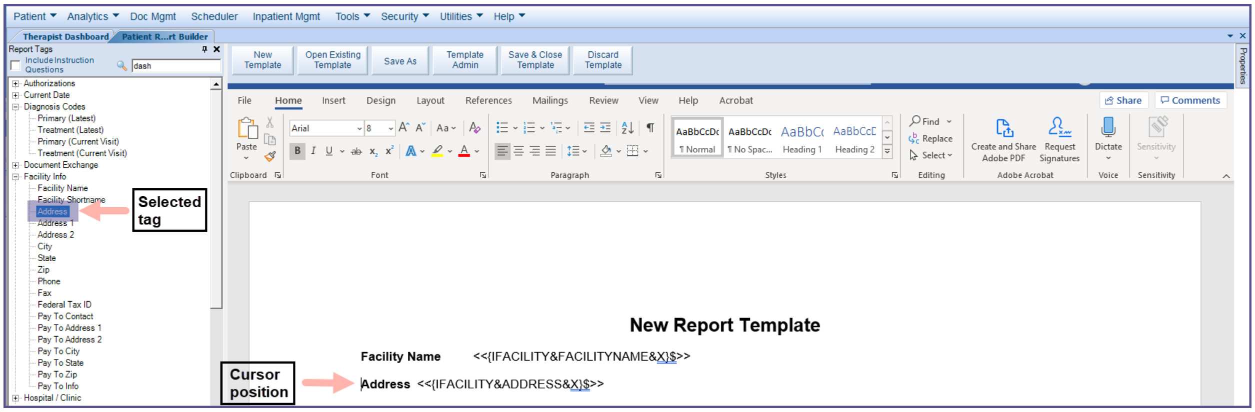
You can use the search field located above the report tags to search for content to add to the template. Simply type part of a tag name into the search field and press the **Enter** key on your keyboard to search though the available tags relating to your search criteria. If there is a match to your search criteria it will be highlighted in the tags menu. There may be several items that match your search criteria, pressing Enter again will go to the next item that matches your search. Keep pressing Enter to cycle through all of the matches to your search, if needed.

You can also expand the category trees by clicking on the plus sign next to a category in the tags menu to reveal available tags related to that category.



To add a tag to your report template:

1. Click in your template.
2. Place your cursor where you would like to add the tag.
3. Double-click on the tag and it will be added to your report.



You can also use the action buttons located on the bottom left of the Report Builder window:

a. *Add Selected to Template*: Select a tag from the report tags menu and place your cursor in the report template, then click this button to add only the selected individual question tag to the template with the label.

b. *Add Selected w/o Labels*: Select a tag from the report tags menu and place your cursor in the report template, then click this button to add the selected tag to the template without the tag label. This can be useful for creating your own narratives by pulling tags in without their label.

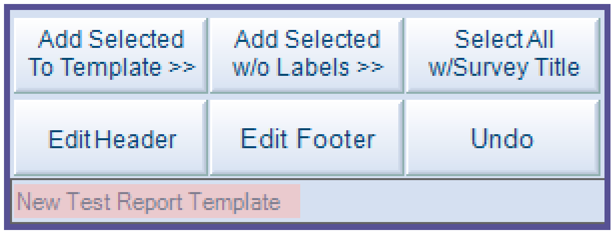
c. *Select All w/ Survey Title*: Select a survey level tag from the report tags menu and place your cursor in the report template, then click this button to pull over the entire survey from the report tags menu with the labels for that particular section. This can be useful when pulling over entire survey pages with questions and labels in a block in your template. More on this below.

d. *Edit Header*: Users can edit the report template header and add tags or text.

e. *Edit Footer*: Users can edit the report template footer and add tags or text.

f. *Undo*: Users can undo an action when building templates, similar to using the keyboard shortcut Ctrl+Z.

Note: If you are ever unsure about which template you are working on, you can see the name of the template at the bottom of the content actions menu, highlighted below.



Adding Survey Blocks

A survey block contains all the questions within a selected survey, for example a Neck Disability Index (NDI).

You can include as many of your regularly used surveys in one template as desired. If the survey page is not filled out, the entire block will not appear when the report is generated. If only one question is answered, the block title and the answered question(s) will appear in the report.

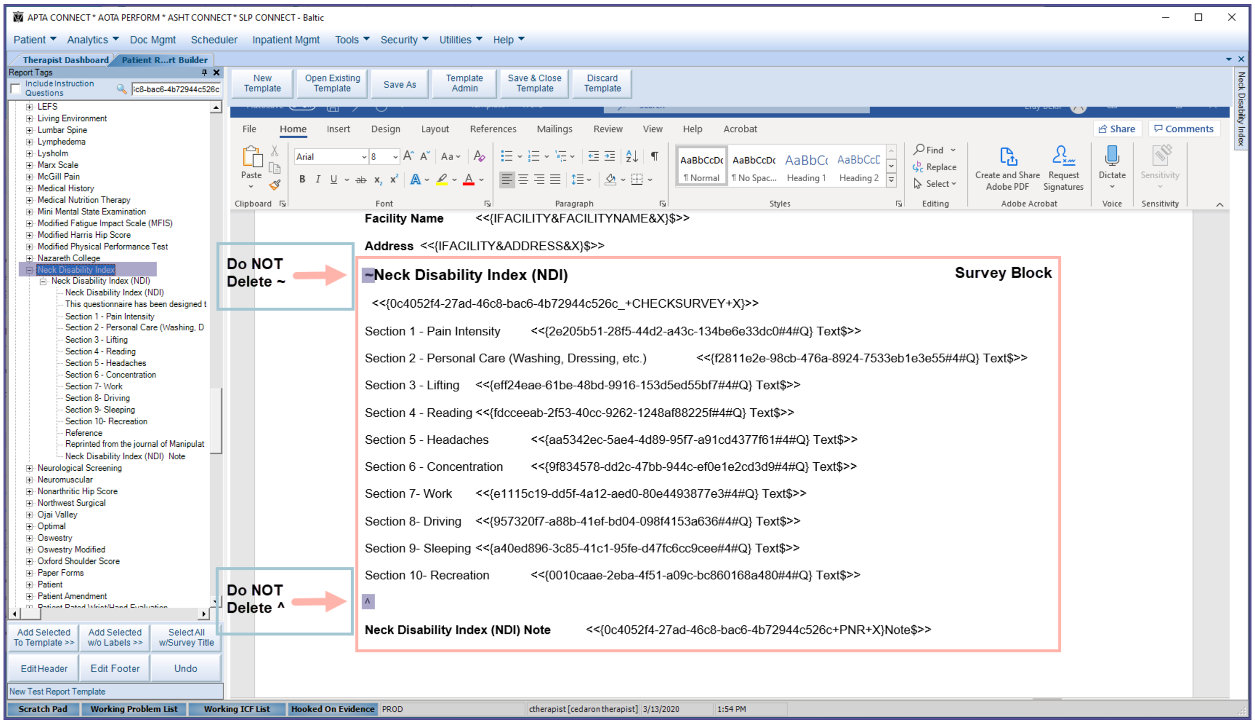
To add a survey block, find the survey in the tags menu as described previously, click on the survey name to highlight it, then click **Select All w/Survey Title**.

The selected survey block will load onto the report with the block title bolded and the tags and labels for each question on the survey.

The title of the block will be preceded by a **tilde (~)** and the last question in the survey will have an **upward caret (^)**, also known as a circumflex, below it.

In order for the survey block to function properly, the **tilde (~)** and **upward caret (^)** must remain intact. Do **NOT** delete the **~** and **^** characters from the report template.

Below is an example of a Neck Disability Index (NDI) survey block being used in a report template.



Below the upward caret (^), a note label and tag for that survey will also load (if there is a note section for that survey). This label and tag can be deleted if desired but, as with other labels and tags, if it is not utilized when completing a survey or examination, it will not populate when the report is generated.

Individual questions loaded from the survey block can also be deleted if desired, however, if that particular question is not completed on the actual survey form, it will not populate when the report is generated. It is easier to allow additional tags for questions, even if they are not commonly completed, to remain on the report template.

Testing Report Templates

Once your report template is completed, it is best practice to test it prior to use with actual patients.

Follow these steps to ensure your report functions properly:

1. Click on **Save & Close Template**.
2. Close the Patient Report Builder tab.
3. If a new report template name was created, then that new report will need to be enabled.

❖ To enable a new report:

i. Click on **Security** in the Connect menu bar.

ii. Click on **Group Manager** in the dropdown.

iii. In the Group Manager window, double click on the name of the group that will need to be able to use the report. It may be necessary to complete the next steps for one, some or all your groups.

iv. In the Groups window that opens for the group selected, click on the **Menu Access** tab.

v. Click on **Assign Menu Access**.

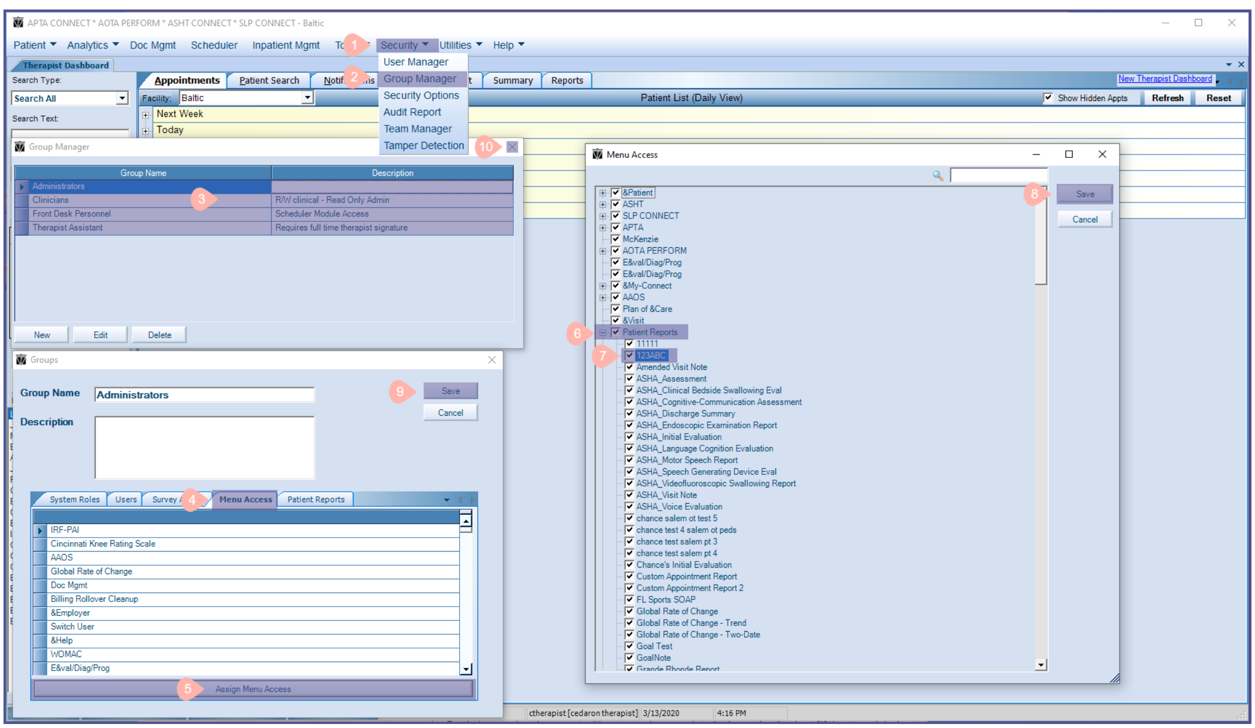
vi. In the Menu Access window, click on the plus symbol (**+**) next to **Patient Reports**.

vii. From the Patient Reports tree that expands, scroll through until you find the title of your newly created report template and check the box next to its name.

viii. Click **Save** in the Menu Access window.

ix. Click **Save** in the Groups window.

x. Close the Group Manager window.



4. Once the report is enabled, it will need to be added to the Patient Menu and/or Patient Dashboard.

   - To add the report to the Patient Menu:

     i. Click on **Utilities** in the Connect menu bar.

     ii. Select **Patient Menu Editor**.

     iii. In the Menu Designer window, click on **File**.

     iv. Scroll to Open, then Organization and select the appropriate patient menu to update from the list.

     v. Click on the **Patient Reports** button to select it.

     vi. In the menu on the right side, click on Menu then click the ellipses (**…**) icon.

     vii. In the Menu Editor window, click on the plus symbol (**+**) to expand the patient reports tree.

     viii. Scroll until you find the title of your report and click on it to highlight it.

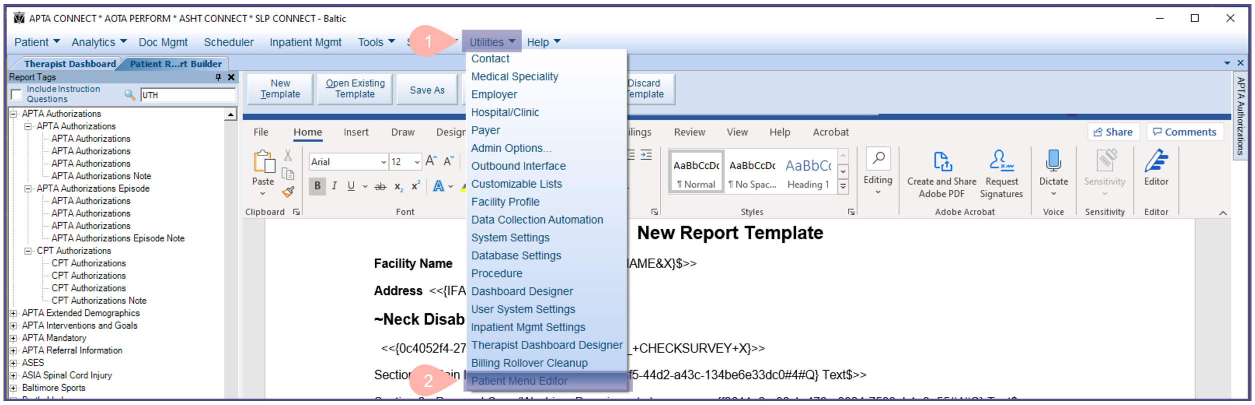
     ix. Click on the right facing arrow to add the report to the list of reports in the right column in the window.

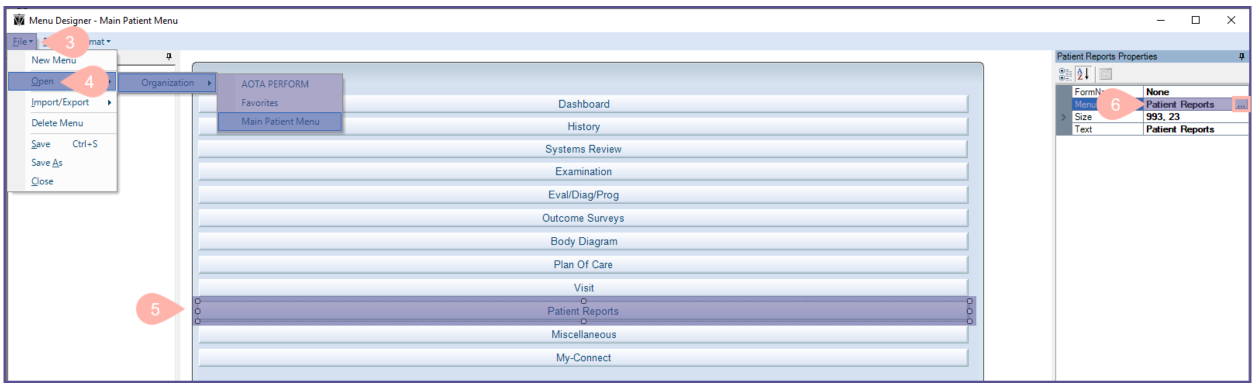
     x. Once a report is added, the order in which it will appear in the patient reports can be adjusted by clicking on the report name, in the right column to highlight it, then clicking on the up and down arrows on the right side until it is in the desired order.

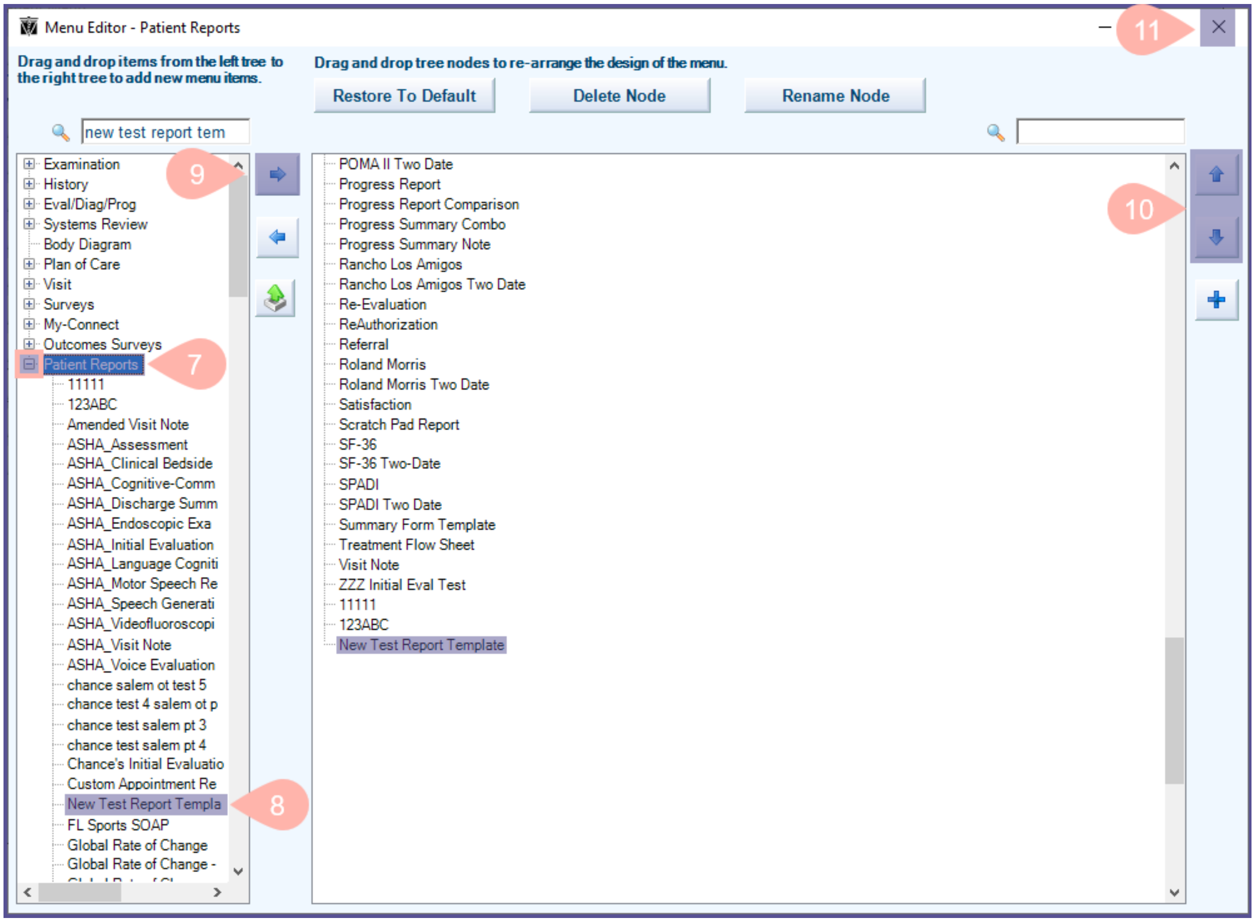
     xi. Once adding reports is completed, click the **X** in the upper right corner to close the Menu Editor window.

     xii. Click on File in the Menu Designer menu bar, then click **Save** to save your changes to the existing patient menu or **Save As** to save the patient menu under a new name.

     xiii. Then close the Menu Designer.






Menu Editor - Patient Reports
Drag and drop items from the left tree to the right tree to add new menu items.
Drag and drop tree nodes to re-arrange the design of the menu.
Restore To Default
Delete Node
Rename Node
11
9
10
7
8
Patient Reports
New Test Report Templa
New Test Report Template


Menu Designer - Main Patient Menu
12
13
New Menu
Open
Import/Export
Delete Menu
Save Ctrl+S
Save As
Close
Main Patient Menu
Dashboard
History
Systems Review
Examination
Eval/Diag/Prog
Outcome Surveys
Body Diagram
Plan Of Care
Visit
Patient Reports
Miscellaneous
My-Connect
Patient Reports Properties

- To add the report to the Patient Dashboard:

  i. Click on **Utilities** in the Connect menu bar.

  ii. Select **Dashboard Designer**.

  iii. In the Patient Dashboard Designer window, click on **File**.

  iv. Scroll to Open, then Organization and select the appropriate patient dashboard to update from the list.

  v. In the Controls panel on the left side, click on the plus symbol (**+**) next to **Controls** to expand the controls tree, then click on **Button** to highlight it.

  vi. In the patient dashboard in the middle of the screen, decide where the button for the report is to be added. For the default Connect dashboard, it will be added under the **Reports** tabs.

  vii. Click and drag the Button control to the where it will be placed in the patient dashboard.

  viii. In the Choose Link Action window that opens, click on the plus symbol (**+**) next to **Reports** to expand the reports tree and scroll through the reports, or use the search box to find the report to be used with the dashboard button being created.

  ix. Once found, with the report name to highlighted, click **Select**. The Choose Link Action window will close.

  x. There will now be a button on the patient dashboard with the name of the report that was selected. The button can be moved and resized by clicking and dragging.

  xi. The button can also be renamed by clicking on it then clicking on **Text** in the properties menu on the right side. Then type in the desired name for the button.

  xii. Click on File in the Menu Designer menu bar, then click **Save** to save your changes to the existing patient dashboard or **Save As** to save the patient dashboard under a new name.

  xiii. Once saved, the Patient Dashboard Designer can be closed.

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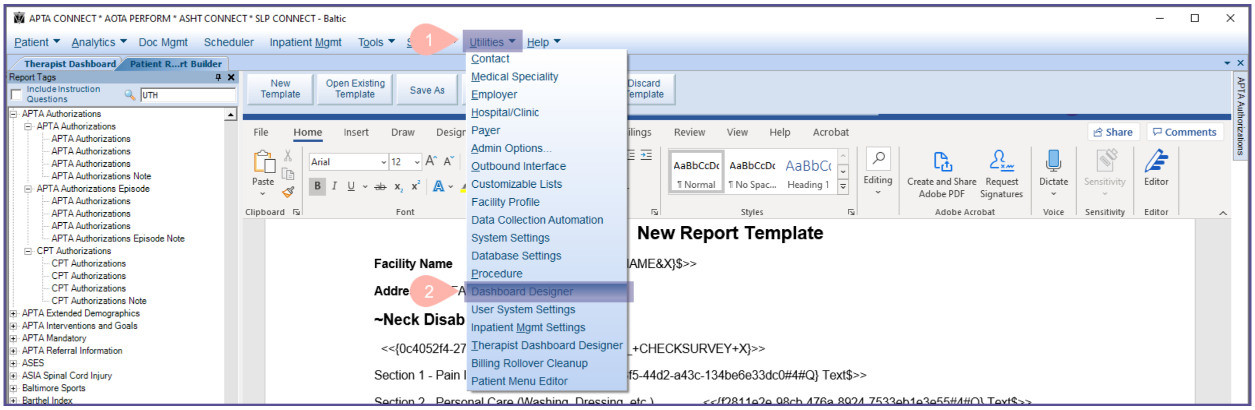

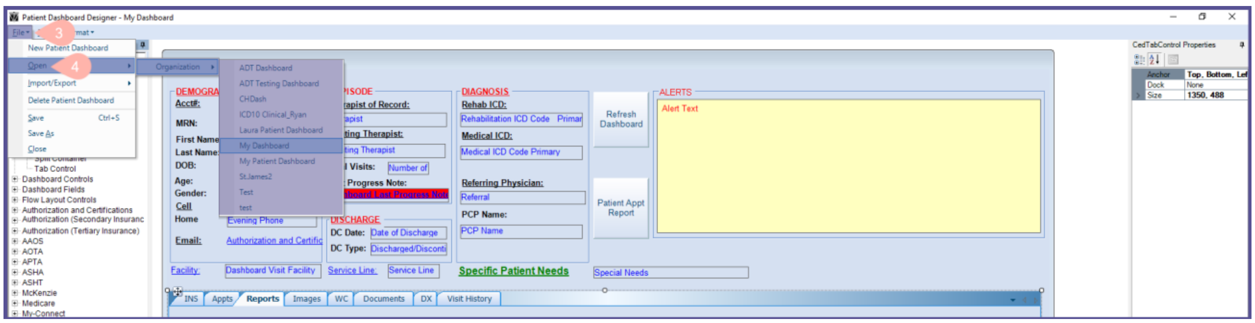

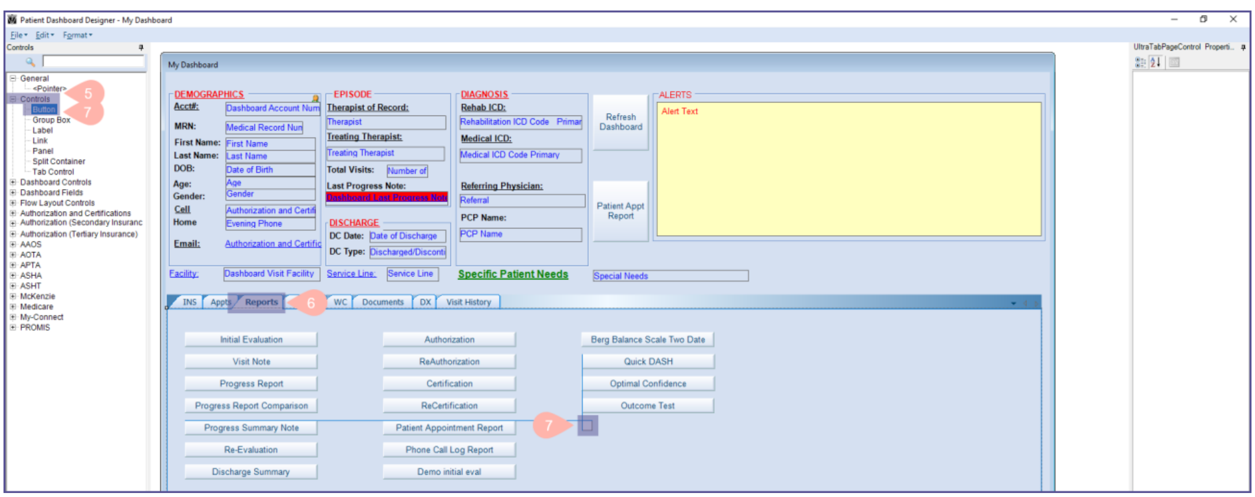

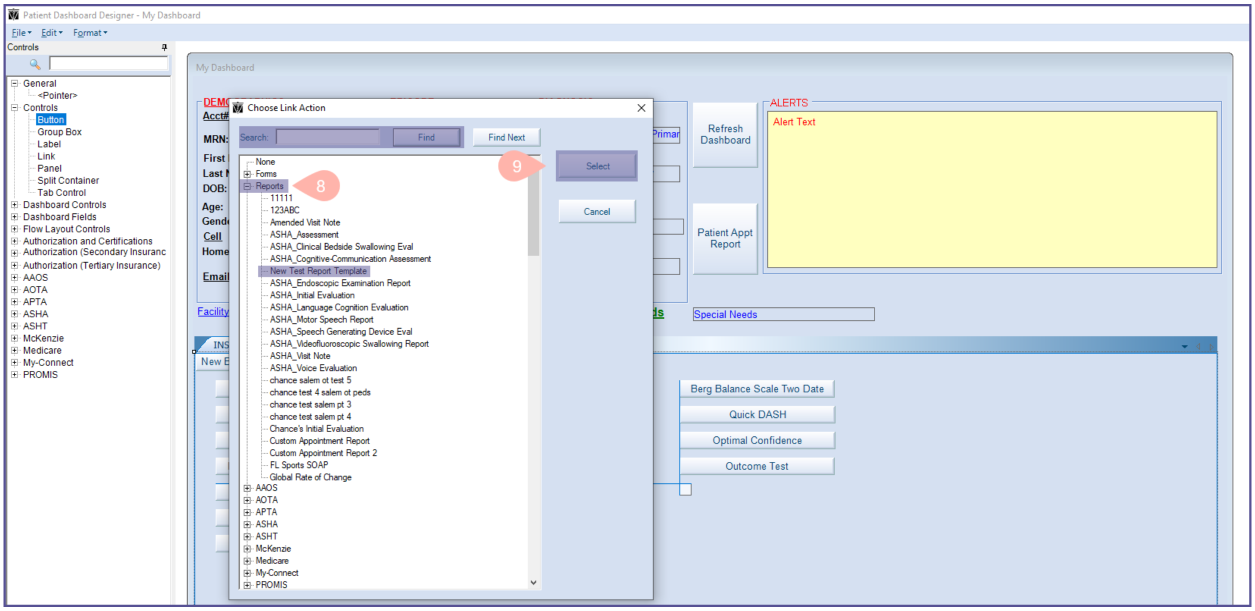

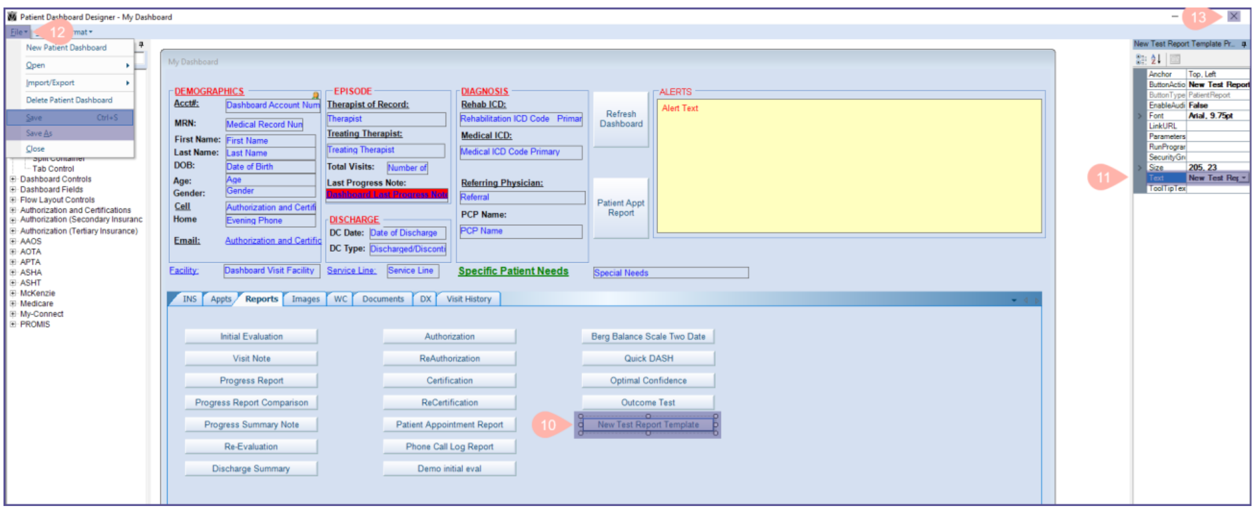

5. With the report enabled and added to the Patient Menu and/or Patient Dashboard, open a test patient's chart, then run the report without entering any data in the patient's chart. If the tags, labels and survey blocks are working correctly, the report should be empty.

6. Next, enter some data into the patient's chart, using the forms that correspond to the tags you have added to your report template. If built correctly, only the answered fields should appear in the report.

7. Make any changes necessary and re-test the report

Report Building Tips

1. Combine report tags from different surveys into one report template to customize the template to the needs of the organization.

2. The document can be formatted using standard Microsoft Word tools such as tables, columns, font, colors, page layout, header/footer, etc.

3. The existing report templates related to standard Connect surveys, such as *Initial Evaluation* or *Visit Note* are read-only documents and cannot be modified.

   a. It is possible to copy and paste sections from standard read-only surveys to custom reports.

   b. It is also possible to create a custom template starting from an existing standard template. This can be done as follows:

      i. Open the desired stock template.
      ii. Click on the *Save As* button and give it a custom name.
      iii. Now the custom template will be editable.

4. Multiple fields can be selected in the survey tree and then brought over into the report all at once, either with or without labels.

5. Updating questions on a MyConnect or a custom survey does not update the Report Builder template using that MyConnect or survey. For this reason, it is recommended to start building a report only when the surveys are fully completed.

   a. For example: If a user modifies a MyConnect question, the same question must be changed in the corresponding report template.

   b. If a user adds a question to a MyConnect and want to use it in the report template, the question needs to be added to the report template.

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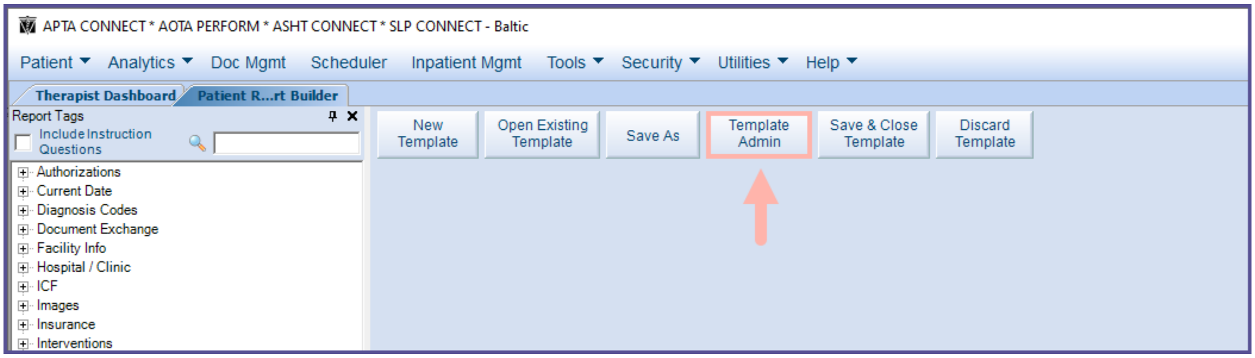
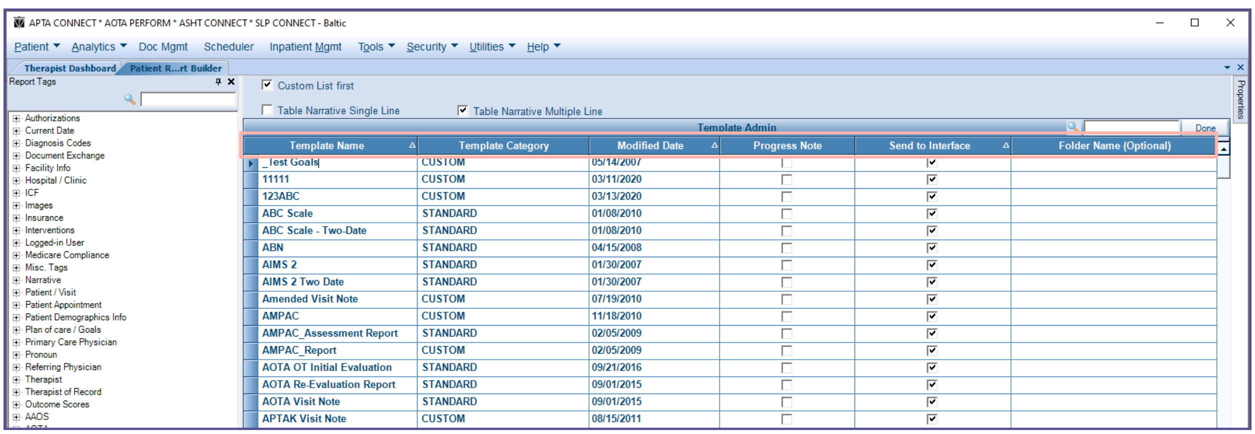
Using Template Admin

Users can manage their report templates in Template Admin within the Patient Report Builder tool. To access Template Admin, from Patient Report Builder click on the **Template Admin** button.



Template Admin will open displaying all of your report templates. Template Admin allows you to search, manage, and delete patient report templates. You can sort this grid by any of these columns.



The **Template Name** column displays the name of the report as it appears in your system.

The **Template Category** identifies if the patient report is Standard or Custom. Any standard report cannot be edited.

The **Modified Date** column identifies the last modified date of the report template.

The **Progress Note** column allows you to select which report templates will clear the progress note requirement in the system.

The **Send to Interface** column identifies which patient reports will be sent across your Permanent Clinical Record (PCR) interface.

The **Folder Name (Optional)** column is used for specific types of PCR interfaces which require an identifier other than the report name. If this additional identifier is needed, this column should be completed with the identifier for each report that will be sent through the PCR interface.

Deleting Report Templates

Users can delete custom report templates if desired. To do so:

1. Access **Template Admin**.

2. Highlight the template to be deleted, by clicking on it and press the **Delete** key on the keyboard.