



E*Value Training Guide

How to Run and View Case Log Reports For Administrators

Updated March 13, 2019

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HOW TO RUN AND VIEW CASE LOG REPORTS

This document is used to aid you on how to run and view the Case Log Reports in E*Value.

After you have logged into E*Value, and selected the .Clinical Encounters program, click the Reports tab.




Click on the Reports Menu item



Each report uses filter functions to provide you with the data results for those reports, some filters will not be used in the .Clinical Encounters Program.

LIST OF FILTER AND THEIR FUNCTIONS THAT ARE USED FOR THE .CLINICAL ENCOUNTERS PROGRAM

Filter Template: You can save your filter selections to a template. We do not recommend doing this, as E*Value's template are usually not reliable and only saves the information for a point in time. If you do choose to use this option, change the date selection and click the Filter/Refresh button .

Start Date: The date that the data you are requesting begins on.

End Date: The date that the data you are requesting ends on.


Course Filter: Leave default of {Active Courses}, as you will only be able to view your Clerkship's logged encounters.

Course: Leave the default of {All Courses}, as you will only be able to view your Clerkship's logged encounters.

User Groups: Select the User Group that you would like to filter on for a group of specific users.

Subject Current Rank: Leave the default of {All Ranks}, to bring in all users logged encounters or select the rank that you would like to view.

Then Rank: Leave the default {All Ranks} to bring in all users logged encounters or select the rank that you would like to view.

Last Name Filter: Use this filter if you are looking to view a specific student's logged encounters, type in that student's last name and click the Filter/Refresh button . You can select the status of the student – Active or Inactive.

Trainees: If you used the Last Name Filter, the student will filter into the Trainees filter, if running the report for all students, leave default of {All Users}.

Diagnosis Group: Select your Clerkship from the Diagnosis Group, this will filter in only those logged encounters for your Clerkship.

Diagnoses: Select specific diagnoses from list (can select multiple); or use the default of {All Diagnoses} to bring in all diagnoses logged.

Trainee's Role: Select the Role you will like to view in your report
{All Roles – Summary View} – this view will have all roles together in one column
{All Roles – Detailed View} – this view will have the roles separated into different columns
Diagnosis Observation
Diagnosis Participated
Diagnosis Alternative Method

Fields: Select Care Setting, as this is the only field option.

Report By: Individual Diagnoses or Diagnoses Groups
Individual Diagnoses – to look up by a specific diagnosis
Diagnoses Groups – look up by Diagnoses Group, which are grouped by your Clerkship


Sort Report By: Sorts the report by using one of the following options:
User Name – This is your name
Supervisor Name: We do not use Supervisors for Case Logs
Procedure Name: We do not have procedures in Case Logs
Activity Name: This is your Clerkship Course
Date: Date you logged the encounter
Trainee Role: Diagnosis Roles
Patient ID: There should not be identifying information for Patient's listed.


Completed/Remaining: Filter selection for this:
Show Completed – shows which diagnoses have completed the required minimum, and show which have not been completed.
Show Remaining – shows which diagnoses will still need to be completed


Include users that have not recorded any Diagnoses: Yes or No – this will allow you to see who has not met the requirements with 0 logged diagnoses.

Format Option: This is the format of the report, either HTML, MS Excel or PDF.

Report Type: Select the Report Type either view by Trainee or Course.

Save Template : Option to save the filter selections to a template – see note on Saving to template.

Delete Selected Template  : Click this button if you have saved a template and want to delete the template from your saved template.

Click Next button  : This will provide the results based on the filter criteria.

There is print function available once this report is run – look at the righthand corner of the page.



Click this icon to send to printer.



Click this icon to send report in an email.



Click this icon to return to the previous page to change or select filters.

LIST OF FILTER FUNCTIONS NOT BEING USED IN THE .CLINICAL ENCOUNTERS PROGRAM

Site - We do not use Sites for the .Clinical Encounters program, leave the following filters with their defaults.

Site Group:

Site Filter:

Site:

Course Group: Leave Default of {All Course Groups} – we do not have Course groups set up for this program.

Count Un-Confirmed Entries: We do not use this filter in .Clinical Encounters.

Confirmation Status: We do not use this feature for Clinical Encounters.

Patient Age Groups: We do not use this filter in .Clinical Encounters.

Patient Ethnic Group: We do not use this filter in .Clinical Encounters.

Patient Gender Group: We do not use this filter in .Clinical Encounters.

Supervisor: We do not use this filter in .Clinical Encounters.

Procedures - We are not using Procedures for the .Clinical Encounters program, leave the following filters with their defaults.

Procedure Group:

Procedures:

The following Case Log Reports will be available for you to select from:

Diagnosis Count: This report will provide you a count of all diagnoses that you have logged. Diagnoses will be listed in the first column with a second column containing the number of logged cases for that diagnosis.

Diagnosis Count

Filter Template: (Select a Template) ▾

Start Date: 12/06/2018 📅 End Date: 03/06/2019 📅

Site Group: (All Site Groups) ▾

Site Filter: (Active Sites) ▾ Filter ⓘ

Site: (All Sites) ▾

Course Group: (All Course Groups) ▾

Course Filter: (Active Courses) ▾ Filter ⓘ

Course: (All Courses) ▾

Subject Current Rank: (All Ranks) ▾

Then Rank: (All Ranks) ▾

User Groups: (All Groups) ▾

Last Name Filter: (Active Users) ▾ Filter/Refresh

Trainees: (All Trainees) ▾

Diagnosis Group: (Select a Diagnosis Group) ▾

Diagnoses: (All Diagnoses) ▾
 1st Trimester Bleeding
 Abdominal pain
 Abnormal Pap Smear
 Abnormal Uterine Bleeding

Trainee's Role: (All Roles) ▾
 Diagnosis - Observation
 Diagnosis - Participated
 Diagnosis - Alternative Method

Confirmation Status: (All Statuses) ▾

Patient Age Group: (All Age Groups) ▾

Patient Ethnic Group: (All Ethnic Groups) ▾

Patient Gender Group: (All Gender Groups) ▾

Supervisor: (All Supervisors) ▾

Format Option: HTML ▾

Save Template Next ->

Sample of Diagnosis Count report - in HTML format

Diagnosis Name	Count
1st Trimester Bleeding	1
Abdominal pain	7
Acute Abdomen	1
Altered mental status in the hospitalized patient	7
Chest Pain	6
Chronic Pain management	1
Diabetes	5
Dyspnea	6
Electrolyte Disorder	6
Fever in the hospitalized patient	6
Gastrointestinal Bleed	7
Hypertension	5
Joint or back pain	4
Kidney Failure	6
Preventative Care	2

Diagnosis Crosstab: This report will provide you a count of all diagnoses that are logged. Diagnosis will be in columns, with the option of clicking on any of the diagnosis to see what the entry log contained.

Diagnosis Crosstab

Filter Template: (Select a Template) ▼

Start Date: 12/06/2018 📅 End Date: 03/06/2019 📅

Site Group: (All Site Groups) ▼

Site Filter: (Active Sites) ▼ Filter 0

Site: (All Sites) ▼

Course Group: (All Course Groups) ▼

Course Filter: (Active Courses) ▼ Filter 0

Course: (All Courses) ▼

Subject Current Rank: (All Ranks) ▼

Then Rank: (All Ranks) ▼

User Groups: (All Groups) ▼

Last Name Filter: (Active Users) ▼ Filter/Refresh

Trainees: (All Trainees) ▼

Report By: Individual Diagnoses ▼

Completed/Remaining: Show Completed ▼

Count Un-Confirmed Entries: Yes ▼

Diagnosis Group: (Select a Diagnosis Group) ▲

(All Diagnoses) ▼

(All Active Diagnoses) ▼

(All Inactive Diagnoses) ▼

Diagnoses: (All Diagnoses) ▲

1st Trimester Bleeding ▼

Abdominal pain ▼

Abnormal Pap Smear ▼

Abnormal Uterine Bleeding ▼

Trainee's Role: (All Roles) ▲

Diagnosis - Observation ▼

Diagnosis - Participated ▼

Diagnosis - Alternative Method ▼

Supervisor: (All Supervisors) ▼

Confirmation Status: (All Statuses) ▼

Include users that have not recorded any Diagnoses: Yes No

Format Option: HTML ▼

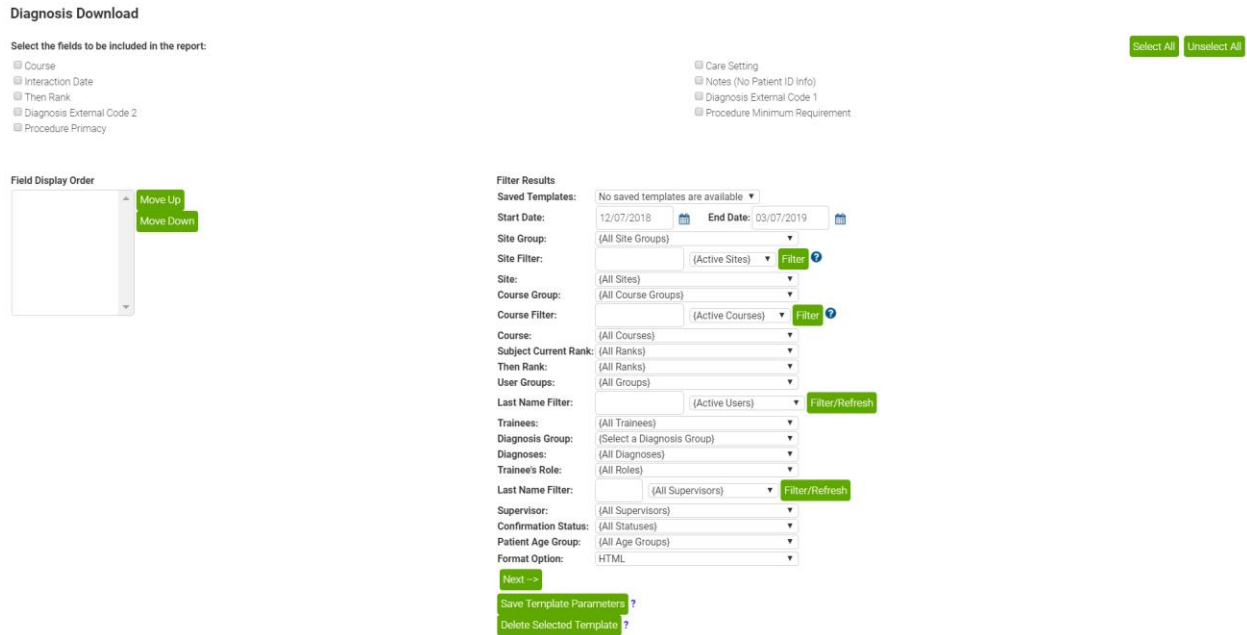
Save Template Next →

Sample of Diagnosis Crosstab report - in HTML format

Clicking on the underlined diagnosis, will show you the logged encounter.

	1st Trimester Bleeding	Abdominal pain	Abnormal Pap Smear	Abnormal Uterine Bleeding	Acute Abdomen	Acute Illness	Acute Management of Any Patient Complaint	Adolescent Patient	Altered Mental Status	Altered the hospitalized patient	Anxiety	Asthma	Behavior; Development
Number Required	1	1	1	1	1	1	1	1	1	1	1	1	1
Test-Student Beecham, Claire	<u>1</u>	<u>1</u>	0	0	<u>1</u>	0	0	0	0	<u>1</u>	0	0	0
Test-Student Grey, Meredith	0	<u>1</u>	0	0	0	0	0	0	0	<u>1</u>	0	0	0
Test-Student Karev, Alex	0	<u>1</u>	0	0	0	0	0	0	0	<u>1</u>	0	0	0

Diagnosis Download: This report will provide you a list of all diagnosis, in separate line items, includes counts.



Select these fields to be included in the report:

- Course
- Interaction Date
- Care Setting
- Notes (No Patient ID Info) – select if you want to bring in the notes that were logged.

All other fields we do not use.

Select All Click on Select All to select all fields to be included in the report – you can unselect ones that you do not want to include.

Unselect All Click the Unselect All to unselect all fields.

As you are selecting fields they fill display into the Field Display Order – you Move Up **Move Up** or Move Down **Move Down** the fields based on where you would like to place them in the report.

Field Display Order

Move Up
Move Down

Field Display Order

Course
 Interaction Date
 Care Setting

Move Up
Move Down

Filter Results

Saved Templates: No saved templates are available ▼

Start Date: 12/07/2018 End Date: 03/07/2019

Site Group: {All Site Groups} ▼

Site Filter: {Active Sites} ▼ Filter

Site: {All Sites} ▼

Course Group: {All Course Groups} ▼

Course Filter: {Active Courses} ▼ Filter

Course: {All Courses} ▼

Subject Current Rank: {All Ranks} ▼

Then Rank: {All Ranks} ▼

User Groups: {All Groups} ▼

Last Name Filter: {Active Users} ▼ Filter/Refresh

Trainees: {All Trainees} ▼

Diagnosis Group: {Select a Diagnosis Group} ▼

Diagnoses: {All Diagnoses} ▼

Trainee's Role: {All Roles} ▼

Last Name Filter: {All Supervisors} ▼ Filter/Refresh

Supervisor: {All Supervisors} ▼

Confirmation Status: {All Statuses} ▼

Patient Age Group: {All Age Groups} ▼

Format Option: HTML ▼

Next ->

Save Template Parameters

Delete Selected Template

Sample of Diagnosis Download report - in HTML format

Notice the up and down arrows in each column, this allows you to reorder by A-Z or 1-3.

Trainee	Record ID	Diagnosis Name	Trainee Role	Status	Course	Care Setting	Interaction Date
Test-Student Karev, Alex	69642385	Chest Pain	Participated	Confirmed	Internal Medicine Clerkship	Inpatient	01/30/2019
Test-Student Karev, Alex	69642385	Dyspnea	Participated	Confirmed	Internal Medicine Clerkship	Inpatient	01/30/2019
Test-Student Karev, Alex	69642978	Kidney Failure	Observation	Confirmed	Internal Medicine Clerkship	Inpatient	01/31/2019
Test-Student Grey, Meredith	69645393	Chest Pain	Alternative Method	Confirmed	Internal Medicine Clerkship	Alternative Methods	01/12/2019
Test-Student Mackenzie, Roger	69645489	Abdominal pain	Participated	Confirmed	Internal Medicine Clerkship	Inpatient	01/09/2019

Diagnosis Logs by Trainee: This report will provide you a list of all diagnosis, in separate line items, does not include counts.

Diagnosis Logs by Trainee

Filter Template: (Select a Template) ▼

Start Date: 12/07/2018 [calendar] End Date: 03/07/2019 [calendar]

Site Group: (All Site Groups) ▼

Site Filter: (Active Sites) ▼ Filter ?

Site: (All Sites) ▼

Course Filter: (Active Courses) ▼ Filter ?

Course: (All Courses) ▼

Subject Current Rank: (All Ranks) ▼

Then Rank: (All Ranks) ▼

User Groups: (All Groups) ▼

Last Name Filter: (Active Users) ▼ Filter/Refresh

Trainees: Test-Student Beecham, Claire ▼

Diagnosis Group: (Select a Diagnosis Group) ▼

Diagnoses: (All Diagnoses) ▲
 1st Trimester Bleeding
 Abdominal pain
 Abnormal Pap Smear
 Abnormal Uterine Bleeding ▼

Trainee's Role: (All Roles) ▲
 Diagnosis - Observation
 Diagnosis - Participated
 Diagnosis - Alternative Method ▼

Supervisor: (All Supervisors) ▼

Confirmation Status: (All Statuses) ▼

Patient Age Group: (All Age Groups) ▼

Patient Ethnic Group: (All Ethnic Groups) ▼

Patient Gender Group: (All Gender Groups) ▼

Sort Report By: User Name ▼

Format Option: HTML ▼

Save Template Next -->

Sample of Diagnosis Log report - in HTML format

Notice the up and down arrows in each column, this allows you to reorder by A-Z or 1-3. Clicking on the underlined diagnosis will allow you to review the logged encounter.

Name	Rank	Trainee Role	Record ID	Diagnosis Name	Course	Supervisor	Date	Care Setting	Age	Gender	Ethnicity	Status
Claire Test-Student Beecham	MS3	Participated	69646428	<u>Abdominal pain</u>	Internal Medicine Clerkship	No Supervisor Specified	01/15/2019	Inpatient	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Participated	69646428	<u>Altered mental status in the hospitalized patient</u>	Internal Medicine Clerkship	No Supervisor Specified	01/15/2019	Inpatient	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Participated	69646428	<u>Chest Pain</u>	Internal Medicine Clerkship	No Supervisor Specified	01/15/2019	Inpatient	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Participated	69646428	<u>Diabetes</u>	Internal Medicine Clerkship	No Supervisor Specified	01/15/2019	Inpatient	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Participated	69646428	<u>Dyspnea</u>	Internal Medicine Clerkship	No Supervisor Specified	01/15/2019	Inpatient	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Participated	69646428	<u>Electrolyte Disorder</u>	Internal Medicine Clerkship	No Supervisor Specified	01/15/2019	Inpatient	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Participated	69646428	<u>Gastrointestinal Bleed</u>	Internal Medicine Clerkship	No Supervisor Specified	01/15/2019	Inpatient	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Observation	70193850	<u>Acute Abdomen</u>	Internal Medicine Clerkship	No Supervisor Specified	02/22/2019	Alternative Methods	Not Applicable	Not Available		Confirmed
Claire Test-Student Beecham	MS3	Participated	70193850	<u>1st Trimester Bleeding</u>	Internal Medicine Clerkship	No Supervisor Specified	02/22/2019	Alternative Methods	Not Applicable	Not Available		Confirmed

Diagnosis Summary by Trainee: This report will provide you a list of all diagnosis in the .Clinical Encounters for a single Trainee, the number of required encounters for each diagnosis, the total completed for diagnosis, and if the requirement has been met.

Diagnosis Summary by Trainee

Filter Template: (Select a Template) ▾

Start Date: 12/07/2018 📅 End Date: 03/07/2019 📅

Site Group: (All Site Groups) ▾

Site Filter: (Active Sites) ▾ Filter ?

Site: (All Sites) ▾

Course Group: (All Course Groups) ▾

Course Filter: (Active Courses) ▾ Filter ?

Course: (All Courses) ▾

Subject Current Rank: (All Ranks) ▾

User Groups: (All Groups) ▾

Last Name Filter: (Active Users) ▾ Filter/Refresh

Trainees: Test-Student Beecham, Claire ▾

Diagnosis Group: (Select a Diagnosis Group) ▾

Diagnoses: (All Diagnoses) ▾
 1st Trimester Bleeding
 Abdominal pain
 Abnormal Pap Smear
 Abnormal Uterine Bleeding

Trainee's Role: (All Roles - Summary View) ▾
 (All Roles - Detailed View)
 Diagnosis - Observation
 Diagnosis - Participated
 Diagnosis - Alternative Method

Confirmation Status: (All Statuses) ▾

Show Groups: Show diagnoses only ▾

Format Option: HTML ▾

Save Template Next ->

Sample of Diagnosis Summary report - in HTML format

Clicking on the underlined diagnosis will allow you to review the logged encounter.

Diagnosis Name	Required	Total Completed	Remaining
1st Trimester Bleeding	1	1	Requirement Met
Abdominal pain	1	1	Requirement Met
Abnormal Pap Smear	1	0	1
Abnormal Uterine Bleeding	1	0	1
Acute Abdomen	1	1	Requirement Met