E*Value Training Guide
How to Run and View Case Log Reports For Trainees
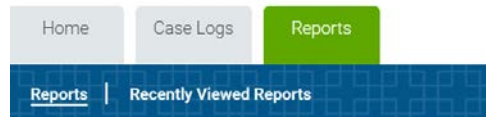
HOW TO RUN AND VIEW CASE LOG REPORTS

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 Form Refresh button `Refresh` .

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: Use this to type in the name of a specific Course to run this report. Leave default of {Active Courses} all courses are active in this program.

> **For example**: You would like to see all of your diagnosis for Family Medicine. Type in the whole name or partial name and click the Filter button `Filter` . This will filter in the Family Medicine Clerkship into the Course: filter.

Course: Select the default of {All Courses}, which will bring in all Diagnosis for all Clerkships, or click on the drop down and select the Clerkship you will want to run the report on.

Form Refresh button `Refresh` : Will list the previously selected criteria on your filters.

Trainees: Your name as the Trainee should filter into this box. You will not have access to any other user's diagnoses entries.

Diagnosis Group: Select the specific Diagnosis Group or leave default of {Select a Diagnosis Group}.

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

Show Groups: Using this feature allows you to run a report that has the diagnoses separated by Diagnosis Group.
> Show diagnosis only - this does not separate into Diagnosis groups, all diagnoses will show in a list.
> Show groups and diagnoses only – this will separate diagnoses into Diagnosis Groups.

Report By: Select this on how the crosstab report will bring in your information
> Individual Diagnoses – each diagnosis on a separate line item.
> Diagnosis Groups – diagnosis group into Diagnosis Groups.

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 the Clerkship Course
>> Emergency Medicine
>> Family Medicine
>> Internal Medicine
>> Neurology
>> Neurosurgery
>> Obstetrics and Gynecology
>> Pediatrics
>> Psychiatry
>> Surgery

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

Limit to groups selected by trainee: Yes or No
> Yes – will only show diagnoses that the Diagnosis Group was selected when logging in the encounter.

No – will bring in all diagnoses, including those that did not have a Diagnosis Group selected. This is a good way to make sure that you have put all of your Diagnoses into the correct group and Clerkship.

Include users that have not recorded any Diagnoses: Yes or No. Leave default of Yes, as you will only be able to see your logged entries.

Date: Date you logged the encounter
    Trainee Role: Diagnosis Roles – see types below.
        Diagnosis – Observation
        Diagnosis – Participated
   Diagnosis – Alternative Method

Patient ID: We do not have identifying information for Patient's listed.

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

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

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

Delete Selected 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 `Next -->` : This will provide the results based on the filter criteria.

There are print functions 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: Use Default of {All Course Groups} – leave Default – we do not have Course groups set up for this program

Subject Current Rank: Leave the default of {All Ranks}.

Then Rank: Leave the default of {All Ranks}.

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

Last Name Filter: You will not need to use this filter, as we do not use Supervisors – leave default of {All Supervisors}

Supervisor: We do not use this filter in .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.

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.

Sample of Diagnosis Count report - in HTML format

Diagnosis Name	Count
1st Trimester Bleeding	1
Abdominal pain	2
Abnormal Pap Smear	1
Abnormal Uterine Bleeding	1
Acute Abdomen	1
Acute Management of Any Patient Complaint	1
Adolescent Patient	1
Altered Mental Status	1
Altered mental status in the hospitalized patient	1
Anxiety	1
Asthma	1
Behavior; Development	1
Brain tumor	1
Breast disease	1
Cerebrovascular disease	1
Cesarean Section Delivery	1
Chest Pain	2
Childhood ADHD	2
Chronic Illness	1

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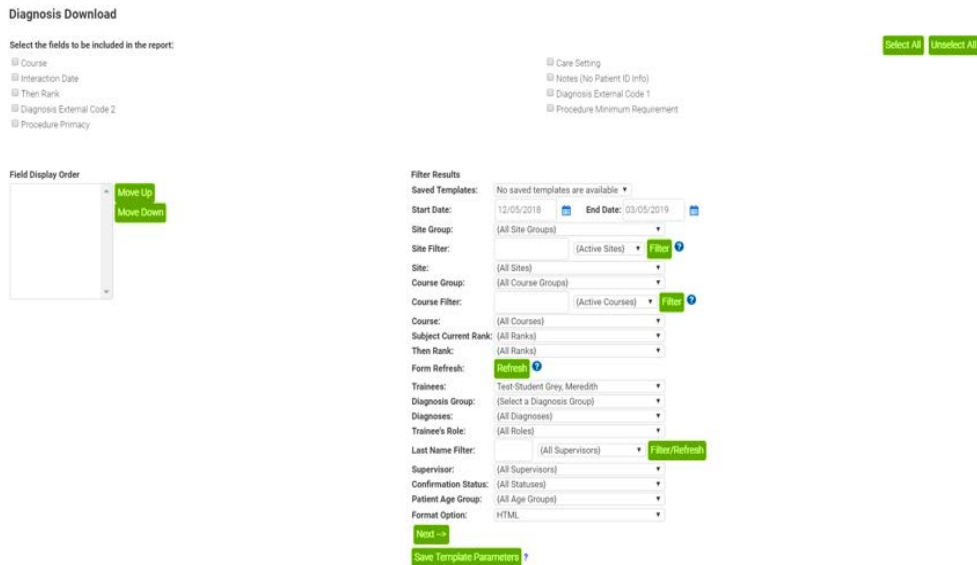

Sample of Diagnosis Crosstab report - in HTML format

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
Number Required	1	1	1	1	1	1	1	1
Test-Student Grey, Meredith	1	2	1	1	1	0	1	1
Totals	1	2	1	1	1	0	1	1
Avg	1.00	2.00	1.00	1.00	1.00	0.00	1.00	1.00

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 you 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

```
Course
Interaction Date
Care Setting
```
[Move Up]
[Move Down]

Filter Results

Saved Templates:	No saved templates are available ▾
Start Date:	12/05/2018 📅 End Date: 03/05/2019 📅
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} ▾
Form Refresh:	[Refresh] ❓
Trainees:	Test-Student Grey, Meredith ▾
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	Interaction Date	Care Setting
Test-Student Grey, Meredith	69642437	Newborn care	Observation	Confirmed	Pediatrics Clerkship	01/16/2019	Inpatient
Test-Student Grey, Meredith	69642437	Chronic Illness	Observation	Confirmed	Pediatrics Clerkship	01/16/2019	Inpatient
Test-Student Grey, Meredith	69644949	Well child care (Infant)	Participated	Confirmed	Pediatrics Clerkship	01/15/2019	Outpatient
Test-Student Grey, Meredith	69644949	Well child care (toddler)	Participated	Confirmed	Pediatrics Clerkship	01/15/2019	Outpatient
Test-Student Grey, Meredith	69645393	Chest Pain	Alternative Method	Confirmed	Internal Medicine Clerkship	01/12/2019	Alternative Methods
Test-Student Grey, Meredith	69645807	Diabetes	Participated	Confirmed	Internal Medicine Clerkship	01/20/2019	Inpatient
Test-Student Grey, Meredith	69645807	Electrolyte Disorder	Participated	Confirmed	Internal Medicine Clerkship	01/20/2019	Inpatient
Test-Student Grey, Meredith	69645807	Fever in the hospitalized patient	Participated	Confirmed	Internal Medicine Clerkship	01/20/2019	Inpatient

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

Sample of Diagnosis Logs by Trainee report - in HTML format

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

Name	Rank	Trainee Role	Record ID	Diagnosis Name	Course	Supervisor	Date	Care Setting	Age	Gender	Ethnicity	Status
Meredith Test-Student Grey	MS3	Observation	69642437	Newborn care	Pediatrics Clerkship	No Supervisor Specified	01/16/2019	Inpatient	Not Applicable	Not Available		Confirmed
Meredith Test-Student Grey	MS3	Observation	69642437	Chronic illness	Pediatrics Clerkship	No Supervisor Specified	01/16/2019	Inpatient	Not Applicable	Not Available		Confirmed
Meredith Test-Student Grey	MS3	Participated	69644949	Well child care (Infant)	Pediatrics Clerkship	No Supervisor Specified	01/15/2019	Outpatient	Not Applicable	Not Available		Confirmed
Meredith Test-Student Grey	MS3	Participated	69644949	Well child care (toddler)	Pediatrics Clerkship	No Supervisor Specified	01/15/2019	Outpatient	Not Applicable	Not Available		Confirmed

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

Sample of Diagnosis Summary report - in HTML format

Notice the up and down arrows in each column, this allows you to reorder by A-Z or 1-3. In the remaining column the red number indicates no diagnosis log for the requirement.

Diagnosis Name	Required	Total Completed	Remaining
1st Trimester Bleeding	1	1	Requirement Met
Abdominal pain	1	2	Requirement Met
Abnormal Pap Smear	1	1	Requirement Met
Abnormal Uterine Bleeding	1	1	Requirement Met
Acute Abdomen	1	1	Requirement Met
Acute Illness	1	0	1