

# Return Ready<sup>™</sup> by CVS Health<sup>®</sup> Reporting Tool Training Guide

This guide is designed to help you navigate the CVS Health<sup>®</sup> Return Ready<sup>™</sup> reporting tool and interpret the Return Ready dashboards.



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# Part 1: About the CVS Health® Return Ready™ reporting tool



#### About the data

The data available in the Return Ready reporting tool includes eligibility data and testing results data.

The eligibility data originates from the program sponsor and includes information about the individuals who are eligible to participate in the Return Ready testing program. This includes demographic information like gender and age band, as well as sponsor-specific information about the individuals like client location or department.

The testing results data is updated daily and provided from the CVS Health record system. The data captures the method, date, and result for the individuals who received a test.

### **About the Security**

The Return Ready reporting tool is designed to accommodate multiple security levels. There are two primary security roles – one for users who can see Personal Information (PI) and one for users who cannot see PI. The Return Ready program administrator will assign reporting system users to either PI or Non-PI role.

On the dashboards, users with PI will have the ability to view individual patient level information, including gender, age, unique identifier, and test results.

Users without PI access will NOT have the ability to view individual level data contained within these dashboards. For this role, users will only be able to view aggregated results such as percent of positive tests, total number tested, and total number of patients eligible for testing.

Note that, while the no-PI access role is designed to obscure individual results, users with access to identifiable information outside of the system could potentially trace a test result back to an individual based on the user's knowledge. For example, if there is only one individual in a location, it would be easy to trace a test result from that location to a specific individual. Please select your users and security roles accordingly.

Available reporting differs based on the security role. For users with PI, three Return Ready Reports will be available. Those without PI access will have access to two of the three.

- Dashboard that shows aggregate test results for the population (PI and Non-PI)
- Report that displays a list of individuals (de-identified for non-PI role) who are eligible for the program but have not tested yet (PI and Non-PI roles)
- Report that shows all test results at the patient level (PI role only)

Table 1. Illustrates the difference between users with and without PI access.



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#### Table 1. Features & Data available by User Security Role

Feature/Data	User with PI Access	User without PI Access
Open & Run Global Return Ready Dashboards	Yes	Yes
Change and Apply New Filters	Yes	Yes
Drill into Data	Yes	Yes, for non-PI fields
Data Fields		
<b>Testing Information</b>	Yes	Yes
(i.e., Test Site, Test Methods, Test Results)		
Sponsor/Company Level Information	Yes	Yes
(i.e., Office location or Department)		
Aggregate Patient Level Information	Yes	Yes
(i.e., Age Band, Gender, Patient Zip Code)		
Individual Patient Level Information	Yes	No
(i.e., Name, Date of Birth, Patient ID)		



# Part 2: Navigating the CVS Health® Return Ready™ reporting tool



### Signing in

- 1. Access the Return Ready reporting tool product using the following URL: https://reports.cvshealth.com/edartnz/broker.
- 2. Type your **Username** and **Password** provided by your account manager.
- 3. Click Sign In.

Note: The first time you sign in, you will be prompted to reset your password. Please follow the password requirements provided on the screen.

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Username			
cdukecvd			
Password			
	- ·	12	
	Forgot	password?	Sign In



#### **Selecting your database**

After signing in, select your database that relays the name of your organization and click **Submit.** 

	Databa	ses	
Search Databases			
ACME Corp			
Detailed Book of Busines Hooli Initech	5		
Timeframe: Jun 20	20 through Jun 2021		

#### **Navigating the Activity Menu**

After selecting your database, you will be directed to the Activity Menu. Please select the "CVS Health® Return Ready<sup>™</sup> Main Dashboard" to access the Return Ready reporting tool.

		Return Ready <sup>-</sup> by <b>CVS</b> Health.
	ACTIVITY MENU	
	OPSTEST (Data: OPSTEST)	
	ACME CORP	
	CVS Health Return Ready Main Dashboard COVID-19 Employee-Unique- Identifier Text Ready Data Dashboard and COVID-19 Employee-Unique-	
DISCLAIMER: Being in the presence of others during the COVID-1 does not eliminate these risks. Further, the development and refiner negative testing results only as presumptive and should consider su	big out pandemic include, but are not limited to, contracting COVID-19 and associated conditions and transmitting COVID-19 to family or household members ent of feeling methodelogies for COVID-19 have been rapid and are engoing. Available testing procedures can produce falte negative results due to a vi in results in the context of each individual's facts and drownstances.	nd others. The Return to Work Program riety of factors. Employer should treat



#### **Accessing your COVID-19 Dashboards**

After selecting "CVS Health™ Return Ready<sup>®</sup> Main Dashboard," you will be directed to a folder titled "CVS Health Return Ready."

If you have access to PI, you will see three dashboards:

- CVS Health Return Ready Main Dashboard,
- Detailed Patients All Results Report, and
- Eligible Patients with No Observed Completed Test Results.

If you do not have access to PI, you will see two dashboards:

- CVS Health Return Ready Main Dashboard and
- Eligible Patients with No Observed Completed Test Results.

Reports	ACME Corp 🗸
Interactive	
PDF (Analysts)	Jun 2020 through Jun 2021 V
PDF	
PDF Archive (Analysts)	CVS Health Return Ready > CVS Health Return Ready
PDF Archive	
Summary Reports	NAME
ECENTLY OPENED	CVS Health Return Ready Main Dashboard
Detailed Patients All Res	
Eligible Patients with No	Detailed Patients All Results Report
CVS Health Return Read	
	Eligible Patients with No Observed Completed Test Results

#### **Running your Return Ready Dashboards**

To run your dashboard, double-click on the dashboard title. The dashboard will open in a new browser tab.



# Part 3: Interpreting the CVS Health® Return Ready™ dashboards



#### **Interpreting the Main Dashboard**

The Main Dashboard includes 11 reporting cells and is designed to provide an overall summary of the COVID-19 testing and results for your population.

Note: Users with PI access will see all reporting cells in this dashboard. Non-PI users may also see all 11 cells if the available reports have more than 26 records.





### 1. Testing Eligibility

This cell shows the total number of unique patients who are eligible for COVID-19 testing based on the eligibility file provided.

#### 2. Completed Tests

This cell shows the total number of total completed tests based on the testing results data provided from Epic.

#### 3. Total Patients Tested

This cell shows the total number of unique patients who have been tested.

#### 4. Positive Cases

This cell shows the total number of unique patients who have tested positive.

#### 5. Completed Test Summary

This cell shows the percentage of unique patients who have been tested. By default, this cell reflects data from the current testing month. If you want to see the results for a different month or all months, you can modify the existing Testing Month filter.

#### 6. Captured Consent / Authorization

This cell shows the percentage of patients who have given consent to share their test results with their employer or testing sponsor after taking the test. By default, this cell reflects data from the current testing month. If you want to see the results for a different month or all months, you can modify the existing Testing Month filter.

#### 7. Test Results (#) by Client Location

This cell shows the number of positive and negative test results by client location for the patients who gave consent to share results. By default, this cell reflects data from the current testing month. If you want to see the results for a different month or all months, you can modify the existing Testing Month filter.

#### 8. Test Results (%) by Client Location

This cell shows the percentage of positive and negative test results by client location for the patients who gave consent to share results. By default, this cell reflects data from the current testing month. If you want to see the results for a different month or all months, you can modify the existing Testing Month filter.



#### 9. Positive Cases by Client Location and Test Date

This cell shows the number of positive cases for each client location by test date. This chart only includes the patients who gave consent to share their test result. By default, this cell reflects data from the current testing month. If you want to see the results for a different month or all months, you can modify the existing Testing Month filter.

### 10. Trend: Cumulative Positive Cases by Client Location and Test Date

This cell shows the cumulative number of positive cases for each client location by test date. Again, this chart only includes the patients who gave consent to share their test result. By default, this cell reflects data from the current testing month. If you want to see the results for a different month or all months, you can modify the existing Testing Month filter.

#### **11. Positive Cases by Client Location County**

This cell shows the number of positive cases by client location county in a map. Note that if multiple client locations are in the same county, the results for all those locations will be included in that county. Again, this chart only includes the patients who gave consent to share their test result. By default, this cell reflects data from the current testing month. If you want to see the results for a different month or all months, you can modify the existing Testing Month filter.



#### **Interpreting the Detailed Patients All Results Report**

The Detailed Patients report provides detailed information for the patients with test results, both positive and negative. This information includes demographic information, like gender and age bad, as well as testing information like test method and test result. This listing only includes patients who gave consent to share their test results.

Only users with PI access have access to this report.

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Patient Conser	nt to Share: Yes										
Confidential State	ment / Disclaimer										
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actors. Employer : Patient Detail	hould treat negative	e testing results only	as presump	tive and should	a consider such resu	its in the context of each indiv	idadi 3 lact3 and circumstan		Ta a r	1	
actors. Employer : Patient Detail Client Location	hould treat negative Patient ID	e testing results only Patient Name	Gender	tive and should	Patient Indicator	Patient Consent to Share	COVID-19 Testing Date	Test Method	Testing Result	Number of Tests	
actors. Employer : Patient Detail Client Location Office 1	Patient ID 00010877758422	Patient Name Anthony,Russell	Gender	Age Band	Patient Indicator CONTRACTOR	Patient Consent to Share Yes	COVID-19 Testing Date 06/03/2020	Test Method	Testing Result Negative	Number of Tests	
Patient Detail Client Location Office 1	Patient ID 00010879758422 00010879584461	Patient Name Anthony,Russell Birttany,Jenkins	Gender M	Age Band 55.59 55.59	Patient Indicator CONTRACTOR CONTRACTOR	Patient Consent to Share Yes Yes	COVID-19 Testing Date 06/03/2020 06/03/2020	Test Method ID NOW COVID 19 Assay ID NOW COVID 19 Assay	Testing Result Negative Negative	Number of Tests	1
Patient Detail Client Location Office 1	Patient ID 00010877758422 00010879588461 00010894558402	Patient Name AnthonyRussell BrittanyJenkins JettreyPerry	Gender M M	Age Band 55-59 55-59 55-59	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR	Patient Consent to Share Yes Yes	COVID-19 Testing Date 06/03/2020 06/03/2020 06/03/2020	Test Method ID NOW COVID 19 Assay ID NOW COVID 19 Assay ID NOW COVID 19 Assay	Testing Result Negative Negative Negative	Number of Tests	
Patient Detail Client Location Office 1	Patient ID 00010877758422 00010879558481 00010894558402 00014851589102	Patient Name Anthony,Russell Brittany,Jenkins Jeffrey,Perry Alan,Gomez	Gender M M M	Age Band 55-59 55-59 55-59 45-49	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR	Patient Consent to Share Yes Yes Yes Yes	COVID-19 Testing Date 06/03/2020 06/03/2020 06/03/2020 06/03/2020	Test Method ID NOW COVID-19 Assay ID NOW COVID-19 Assay ID NOW COVID-19 Assay ID NOW COVID-19 Assay	Testing Result Negative Negative Negative Negative	Number of Tests	
Patient Detail Client Location Office 1	Patient ID 00010871758422 0001087958461 00010894558402 00014851958102 0001487658172	Patient Name Anthony,Russell Brittany,Jenkins Jeffrey,Penry Alan,Gomez Justin,Bell	Gender M M M	Age Band 55-59 55-59 55-59 45-49 40-44	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR	Patient Consent to Share Yes Yes Yes Yes	COVID-19 Testing Date 06/03/2020 06/03/2020 06/03/2020 06/03/2020	Test Method ID NOW COVID-19 Assay ID NOW COVID-19 Assay ID NOW COVID-19 Assay ID NOW COVID-18 Assay ID NOW COVID-18 Assay	Testing Result Negative Negative Negative Negative	Number of Tests	
Patient Detail Client Location Office 1	Patient ID 0001087758422 0001087758422 00010894558402 00014851958102 0001487858172 0001487858172	Patient Name Anthony,Russell Brittany,Jenkins Jeffrey,Penry Alan,Gomez Justin,Beil Eugene,Garcia	Gender M F M M M M	Age Band 55-59 55-59 55-59 45-49 40-44 55-59	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR	Patient Consent to Share Yes Yes Yes Yes Yes	COVID-19 Testing Date 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020	Test Method ID NOW COVID-19 Assay ID NOW COVID-19 Assay	Testing Result Negative Negative Negative Negative Negative	Number of Tests	
Patient Detail Client Location Omce 1	Patient ID 00010877758422 00010877758422 00010879558461 00010894558402 00014851958102 00014851958102 00016306958420 00016558256102	Patient Name Anthony Russell Brittany, Jenkins Jeffrey, Penry Alan, Gomez Justin, Beil Eugeno, Garcia Joshua, Rodnguez Mender Garcia	Gender M F M M M M M S	Age Band 55-59 55-59 45-49 40-44 55-59 45-49 45-49	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR	Patient Consent to Share Yes Yes Yes Yes Yes Yes Yes Yes	COVID-19 Testing Date 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020	Test Method ID NOW COVID-19 Assay ID NOW COVID-19 Assay	Testing Result Negative Negative Negative Negative Negative Negative	Number of Tests	
Patient Detail Client Location Omce 1	Patient ID 0001087/758422 0001087/758422 00010879588461 00010894558402 00014851958102 00014851958102 00016306958402 00016506558258102 00016669958101 00010866958121	Patient Name Anthony:Russell Bittany,Jenkins Jeffrey,Penry Alan,Gomez Justin,Bell Eugeno,Garcia Joshua,Rodriguez Jennifet,Garcia	Gender M F M M M M F E	Age Band 55-59 55-59 45-49 40-44 55-59 45-49 45-49 40-44	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR	Patient Consent to Share Vis Yes Yes Yes Yes Yes Yes Yes Yes Yes Ye	COVID-19 Testing Date 04/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020	Test Method ID NOW COVID-19 Assay ID NOW COVID-19 Assay	Testing Result Negative Negative Negative Negative Negative Negative Negative Negative	Number of Tests	
Patient Detail Client Location Office 1	Patient ID 0001087758422 00010877584422 00010879588461 0001094558402 00014851958102 000148558258102 0001686958402 00016669958101 0001986558272	Patient Name Anthony:Russell Bittary.Jenkins Jettrey.Perry Alan,Gomez Justin,Beil Eugene,Garcia Joshua.Rodriguez Jennifer,Garcia Kelly,Gothernez Matthow Erevents	Gender M F M M M M F F M M M M M M M M M M	Age Band 55-59 55-59 55-59 45-49 45-49 45-49 45-49 45-49 45-49 45-49 45-49	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR CONTRACTOR	Patient Consent to Share Yes Yes Yes Yes Yes Yes Yes Yes Yes Ye	COVID-19 Testing Date 04/03/2020 04/03/2020 04/03/2020 04/03/2020 04/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020 06/03/2020	Test Method ID NOW COVID-19 Assay ID NOW COVID-19 Assay	Testing Result Negative	Number of Tests	



#### Interpreting the Eligible Patients with No Observed Completed Test Results

The Eligible Patients with No Observed Completed Test Results report provides detailed information for the patients who are eligible to participate in the CVS Return Ready program but who have no observed test results. This information includes demographic information, like gender and age bad.

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ligible Patie	ents with No (	Observed Co	mpleted	Test Res	ults		4 v 24 v 1	/ ▲	Save 🗸
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DISCLAIMER: Bein	g in the presence of k Program does not	others during the CC eliminate these risks.	VID-19 pand Further, the	lemic include, l development a	but are not limited to, co and refinement of testin	ontracting COVID-19 and associated ig methodologies for COVID-19 have	conditions and transmitting COVID-19 to been rapid and are ongoing. Available to	family or househo esting procedures	old members and others. can produce false
regative results du Patient Detail	ue to a variety of fact	tors. Employer should	i treat negati	ve testing resu	ilts only as presumptive	and should consider such results in	the context of each individual's facts and	circumstances.	
Patient Detail	e to a variety of fact	tors. Employer should Patlent Name	i treat negati Gender	ve testing resu Age Band	ilts only as presumptive Patient Indicator	and should consider such results in	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843858142	tors. Employer should Patlent Name Albert,Rodriguez	I treat negati Gender Male	ve testing resu Age Band 40-44	Patient Indicator	Unique Patients	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843858142 03652807958952	Patient Name Albert Rodriguez Daniel Jenkins	Gender Mole	Age Band 40-44 35-39	Patient Indicator CONTRACTOR	Unique Patients	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843858142 03562807958952 03567809158122	Patient Name Patient Name AlbertRodriguez DanieLJenkins Terry,Green	Gender Mole Male Male	Age Band 40-44 35-39 45-49	Patient Indicator CONTRACTOR CONTRACTOR EMPLOYEE	Unique Patients	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843858142 03562807958952 03567280958122 03572845258892	Patient Name Patient Name Albert/Rodriguez DanieLJenkins Torry,Green Russell,Rivera	Gender Mole Male Male Male	Age Band 40-44 35-39 45-49 20-24	Patient Indicator CONTRACTOR CONTRACTOR EMPLOYEE DEPENDENT (ADULT)	Unique Patients	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843858142 035628079589122 03567809158122 0357787758882	Patient Name Patient Name Albert,Rodriguez DanieLJenkins Terry,Green Russel/Rivera Arthur,Robinson	Gender Mole Male Male Male Male	Age Band 40-44 35-39 45-49 20-24 5-9	Patient Indicator CONTRACTOR CONTRACTOR EMPLOYEE DEPENDENT (ADULT) DEPENDENT (ADULT)	Unique Patients	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843858142 03562807958952 03562805891580 03572845258892 0357870758882 03584628058402	Patient Name Patient Name Albert,Rodriguez Daniel,Jenkins Terry,Green Russell,Rivera Arthur,Robinson Harry,Morris	Gender Mole Male Male Male Male Male	Age Band 40-44 35-39 45-49 20-24 5-9 55-59	Patient Indicator CONTRACTOR CONTRACTOR EMPLOYEE DEPENDENT (ADULT) DEPENDENT (MINOR) EMPLOYEE	Unique Patients	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843858142 03562807958952 03567809158122 03572845258892 03572845258892 03574870558882 03574870558882 03584828058102 03584858058102	Patient Name Patient Name AlbertRodriguez DanieLJenkins Terry,Green Russell,Rivera Arthur,Robinson Harry,Morris Dennis,Jones	t treat negative for the second	Age Band 40-44 35-39 45-49 20-24 5-9 5-5 5-5 5-59 45-49	Patient Indicator CONTRACTOR CONTRACTOR EMPLOYEE DEPENDENT (ADULT) DEPENDENT (MINOR) EMPLOYEE EMPLOYEE	Unique Patients	the context of each individual's facts and	circumstances.	
Patient Detail Client Location Office 1	Patient ID 03555843855142 03562807958952 03567809158122 03572845258892 03572845258892 03584828058102 03584858058102 03586874358402	Patient Name Patient Name Albert Rodriguez Daniel,Jenkins Terry,Green Russell,Rivera Arthur,Robinson Harry,Moris Dennis,Jones Roger,Garcin	t treat negative for the second secon	Age Band 40-44 35-39 45-49 20-24 5-5 55-59 45-49 55-59	Patient Indicator CONTRACTOR CONTRACTOR CONTRACTOR EMPLOYEE DEPENDENT (ADULT) DEPENDENT (MINOR) EMPLOYEE EMPLOYEE EMPLOYEE EMPLOYEE EMPLOYEE	Unique Patients	the context of each individual's facts and	circumstances.	



# Part 4: Exporting, Viewing Detail Data, Filtering, Editing, and Saving



#### Exporting

Exporting provides you with the ability to archive your data. As reports will update with new data when available, you may want to capture and access the specific testing data for the day.

To export a dashboard or a report:

1. Click the export button in the top right corner of the screen to display the Export Dashboard window.



- 2. Select a Format. Options include PDF, Word, and Excel.
- 3. Choose a Page Orientation (Portrait or Landscape).
- 4. Leave the other fields to the default options.
- 5. Click Export.

Export Dashboard		
Format		
PDF File (".pdf)	~	
Page Orientation		
Portrait	~	
Style Name		
Plain	~	
Export Dashboard with reports on separate pages		
Include Dashboard and Report Titles		
	Cancel Ex	port



#### **Viewing detail data**

You can dig deeper into your data by using the View Detail Data feature in the Return Ready reporting tool. To view detail data within a dashboard cell, left click on the data of interest and select "**View Detail Data for...**" The detailed information for the population of interest will display.



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VIEW DETAIL	DATA							_				
Rolling	Incurred	- Enrollment Detail						ą	Options 📥 Exp	oort S	ave Column	s Close
				« « Re	cords 1-100 of 40	0 > »						
									Test Month: 2020	06 Unique I	Patients Test	ed: Patients Tested
Group	Subgroup	Encrypted Member ID	Member ID	Employee Status	Employee Type	Relationship	Gender	Age Band	Age/Gender Band	Address	City	Member MS
Group A	Subgroup B	006GOStGObGmZ66mGS3O0OZm	001863486589211983F60629	Active	Full Time	N/A	Female	35-39	35-39 F	N/A	Chicago	1600 Chicago,
Group B	Subgroup A	006GObtOtbGmzZ6mGbdO00Zm	001865464589721985M60629	Active	Full Time	N/A	Male	30-34	30-34 M	N/A	Chicago	1600 Chicago,
Group A	Subgroup B	006SOSS66bGGO66mmZ3O0OZm	001363311588611992F60629	Active	Full Time	N/A	Female	25-29	25-29 F	N/A	Chicago	1600 Chicago,
Group A	Subgroup A	006mOSObzbG6bZ6mz6dO0OZm	001963657581521971M60629	Active	Full Time	N/A	Male	45-49	45-49 M	N/A	Chicago	1600 Chicago,
Group A	Subgroup B	006mOb0ZzbG60Z6mztdO00Zm	001965027581021974M60629	Active	Full Time	N/A	Male	45-49	45-49 M	N/A	Chicago	1600 Chicago,
Group B	Subgroup B	006tOGG66bG6666mzz3O00Zm	001468811581111977F60629	Active	Full Time	N/A	Female	40-44	40-44 F	N/A	Chicago	1600 Chicago,
Group A	Subgroup B	006tOGtGzbGtO66mOZ3O0OZm	001468487584611962F60629	Active	Full Time	N/A	Female	55-59	55-59 F	N/A	Chicago	1600 Chicago,
Group A	Subgroup A	006tOb66ZbGt5Z6mO0dO00Zm	001465112584321960M60629	Active	Full Time	N/A	Male	60-64	60-64 M	N/A	Chicago	1600 Chicago,
Group A	Subgroup A	006z000bbbGzSZ6mb0d000Zm	001766655587321950M60629	Active	Full Time	N/A	Male	65-69	65-69 M	N/A	Chicago	1600 Chicago,
Group B	Subgroup A	06660G00SbGzzZ6mbbd0006G	011168063587721955M60618	Active	Full Time	N/A	Male	60-64	60-64 M	N/A	Chicago	1600 Chicago,
Group B	Subgroup A	06660GGZbbGz666mbz30006G	011168825587111957F60618	Active	Part Time	N/A	Female	60-64	60-64 F	N/A	Chicago	1600 Chicago,
Group B	Subgroup B	066m0O0b0bGzGZ6mbmdO006G	011966056587821959M60618	Active	Full Time	N/A	Male	60-64	60-64 M	N/A	Chicago	1600 Chicago,
Group A	Subgroup A	0Z60zGGO6bGmO66mGZ3O0O6G	021078861589611982F60618	Active	Full Time	N/A	Female	35-39	35-39 F	N/A	Chicago	1600 Chicago,
Group A	Subgroup B	0Z6GOSmSSbGzZ66mbS3O00SZ	021863933587211953F60632	Active	Full Time	N/A	Female	65-69	65-69 F	N/A	Chicago	1600 Chicago,
Group B	Subgroup B	0Z6OzG0mGbG0m66mtG3O0OSZ	021678098580911948F60632	Active	Full Time	N/A	Female	70-74	70-74 F	N/A	Chicago	1600 Chicago,
Group A	Subgroup A	0Z6bzGZtbbG6S66mz03000SZ	021578245581311970F60632	Active	Full Time	N/A	Female	50-54	50-54 F	N/A	Chicago	1600 Chicago,
Group B	Subgroup B	1192L29Q2M2Q2QQTbTP919fT	006838618581811979F60629	Active	Full Time	N/A	Female	40-44	40-44 F	N/A	Chicago	1600 Chicago,



#### **Filtering**

The Return Ready reporting tool enables you to easily filter on the information you want to access. For example, you can focus a specific test month, department, or geography. You can filter on descriptive categorical fields called Dimensions.

#### **Examples:**

• Dimensions: Office Location, Department, Testing Location, Testing Methods

To add, edit, or remove filters from the Report Design screen, click the Edit Report Filters button.



The Report Filters screen will display. The left pane displays the currently applied filters and lets you perform filtering options. Use this pane to add, edit, and remove filters. Given the nature of the data available in the Return Ready reporting tool, only **Dimension** filters are relevant

Report Filters	
Dimension Filters	
Test Month = 202006	8
+ Add Filter	
Detail Measure Filters	
+ Add Filter	
Aggregate Measure Filters	
+ Add Filter	
Complex Filters	
+ Add Filter	
Top/Bottom-X Filter	
+ Add Filter	
O Aggregate Filter Options	



#### Adding a Dimension Filter

To add a Dimension filter, click **+ Add Filter** beneath the desired filter type. When all filters are added, edited, or deleted, click **Save**. To remove an applied filter, click the trash can icon to the right of the filters. Below is a step by step instruction on how to apply a Dimension filter to a report.

1. Click on the "+" sign in the top right corner of the reporting cell you would like to add a filter to expand it.

<b>CVS</b>	Healt	ACME Corp Jun 2020 through	h Jun 2021	Search	۰ (٢)	Caroline Duke - CVS Health Return Ready
CVS Health Retur	rn Ready Mair	n Dashboard		· ·		🛓 Save 🗸 🧔 🤯
Testing Eligibili	Completed T	Total Patients	Positive Cases	Confidential Statement / Disclaimer		
450 Total Unique Eligibles	400 Total Completec Tests	400 Unique Patients Tested	20 Positive Patients	CONFIDENTIAL: CONTAINS SENSITIVE PERSON DISCLAIMEE Being in the presence of others du COVID-19 and associated conditions and transmit Work Program does not eliminate these risks. Fur have been rapid and are ongoing. Available testif Employees thould treat negative testing results on individual's facts and circumstances.	NEL INFORMATION ring the COVID-19 pandemic in titing COVID-19 to family or hou thor, the development and rofi ng procedures can produce fai ly as presumptive and should of	chide, but are not limited to, contracting seehold members and others. The Return to nement of testing methodologies for COVID-19 se negative results due to a variety of factors, consider such results in the context of each
Completed Test Summ	Captured C	onsent/Auth. nth: 202006 😮	Test Results (#) by Clier	nt Location O06 ④ Consent to Share Results: Yes	Test Results (%) by C	ilient Location O06 ④ Consent to Share Results: Yes
B8.9%	Unique Patients Tested Patients Tested Patients Not Tested No Yes		300 188 200 198 4 00 0 - - - - - - - - - - - - -	116 56 4 Office 2 Client Location Result gative Positive	150.0% 150.0% -94.0% 100.0% -94.0% 0.0% -0mo 0.0% -0mo Testin N	96.7% 93.3% 6.0% 3.3% 6.7% e1 Office 2 Office 3 Client Location ng Result legative Positive

2. Click the Edit Report Filters button located beneath the header.



3. Click **+ Add Filter** for Dimension Filters. Then, locate the appropriate dimension by searching for a dimension by name or scrolling. Select the dimension and click **Next**.

Dimension Filters	Select Dimension
+ Add Filter	Search for a dimension by name. Each record in the data source will be evaluated. If the
Detail Measure Filters	each record is 1 service which is an admission in an IP data source. If the applied filter is Gender = Female, only admissions for females will display in the report.
+ Add Filter	Search Next
Aggregate Measure Filters	
+ Add Filter	Patient Consent to Share Patient ID
Complex Filters	COVID-19 Testing Date
+ Add Filter	Testing Result
	Testing Location
Top/Bottom-X Filter	Testing Week
+ Add Filter	Testing Calendar Month
Aggregate Filter Options	Testing Month Age
	Age/Gender Band

- 4. Select the categorical values you would like to focus on.
  - a. Use a search to locate available values,
  - b. Choose dimension values (use CTRL + click to select multiple values) and click Add Selected. Click Add All to make all Available Values become Selected Values
  - c. Additionally, you can double-click to add a single dimension value
  - d. To de-select dimension values, choose the values (use CTRL + click to select multiple values) and click **Remove Selected**. Click **Remove All** to make all Selected Values become Available Values.

Dimension Filters	Dimension Filter				
Test Month = 202006	Dimension Filters are applied to each record in the data source. For example, in an Outpatient				
Consent to Share Results = Yes	report, Service Type = Emergency Room will only display ER visits as each record is 1 service which is a visit in the OP data source.				
+ Add Filter	Description	Data Source			
Detail Measure Filters	Testing Location = Minute Clinic #3, Minute Clinic #4	Custom Reports/Rolling In			
+ Add Filter	Auto Generate Description  Filter using absolute values  Instruction where dimension value is not equal Firee-form entry	to 👻			
+ Add Filter	Available Values	Selected Values			
Complex Filters	Search	Minute Clinic #3			
+ Add Filter	Minute Clinic #1 * Minute Clinic #2 Minute Clinic #5	windle Clific #4			
Top/Bottom-X Filter	XXXXX				



5. Once the filter is defined with the desired values, you can click **Add Filter**. To cancel the operation, click **Forget Filter**.

Complex Filters	Filter available values		
+ Add Filter	No filtering		
Top/Bottom-X Filter	'All Values' Label		
	All Testing Locations	Auto Generate Label	
+ Add Filter			
Of Aggregate Filter Options			Forget Filter Add Filter



#### **Removing an Existing Filter**



To remove a filter from a report, left click on the applied filter and select **Remove Filter**.

#### Editing an Existing Filter

To edit an existing filter, left click on the filter and select **Edit Filter**. This will display an Edit Filter window where you can modify the filter.





#### **Editing the Return Ready Dashboards**

You can customize the Return Ready dashboards by adding and removing fields and changing the chart type. To do this, expand the cell you would like to edit using the plus sign that pops up in the top right corner of a cell when you hover over it.

Then, click on the design button

on the top right corner of the screen.



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On the Design screen, you can add dimensions or measures. Drag one from the Available Dimensions or Available Measures and drop into the appropriate Dimension or Measure box. You can also change the chart type by selecting from the available options on the left. Click "Apply" in the right corner to apply your changes.

Design 🛈			T		Cancel Apply
		Report Data Table Attributes	Row Dimensions	Column Dimensions	-
Table	Listing	Search	E Client Location		
Linn Notical Bar	E.	Dimensions     Encrypted Member ID     Member Encrypted ID	Patient ID		
venical bar	Honzomai bai	Member ID Reporting Period	■ Patient Name		
0 Waterfall	Pie	Incurred Quarter Incurred Month Company Code	E Gender 🗎		
		C Date of Birth			
Line	Tree Map	Add to Rows Add to Columns	Remove All	Remove All	
3		Soarch	Number of Tests		
Map	Scatter	Measures     Unique Members			



#### **Saving your Return Ready Dashboards**

After customizing your dashboards, you can them by clicking "Save" and then "Save As" in the top right corner of the screen.

A pop-up screen will appear that will give you the option to name the report.

Note: You will not be able to save over the three global dashboards.



