Return Ready™ by CVS Health® Reporting Tool Training Guide

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

Contents

CVSHealth.

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.

Table 1. Features & Data available by User Security Role

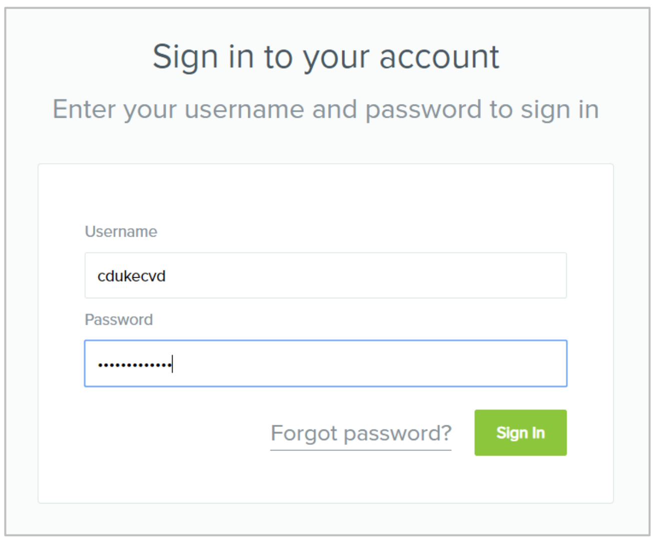
Feature/Data	User with PI Access	User without PI Access
Open & Run Global Return Ready Dashboards	Yes	Yes
Change and Apply New Filters	Yes	Yes
Drill into Data	Yes	Yes, for non-PI fields
Data Fields		
Testing Information **(i.e., Test Site, Test Methods, Test Results)**	Yes	Yes
Sponsor/Company Level Information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

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

Signing in

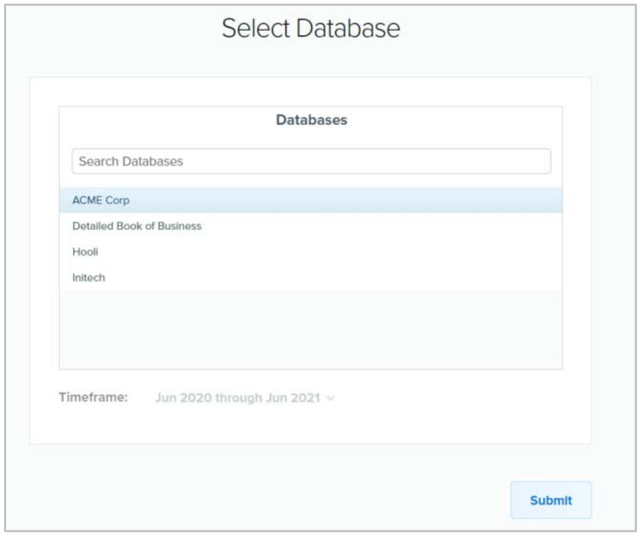
1. Access the Return Ready reporting tool product using the following URL: https://reports.cvshealth.com/edartnz/broker.
2. Type your **Username** and **Password** provided by your account manager.
3. Click **Sign In**.

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



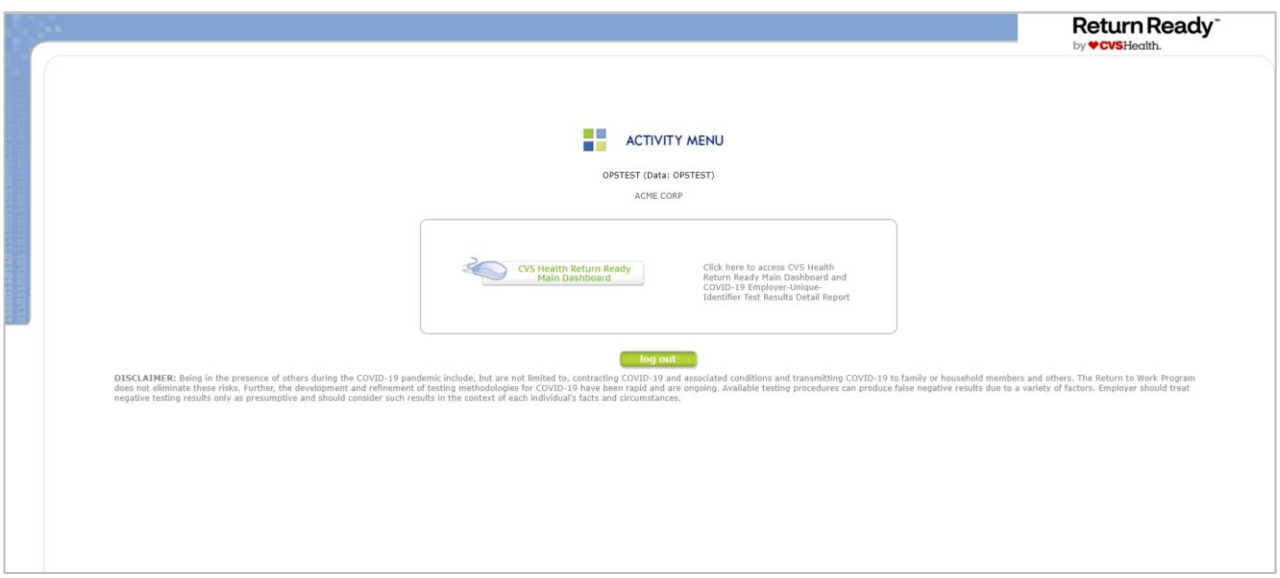
Selecting your database

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



Navigating the Activity Menu

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



Accessing your COVID-19 Dashboards

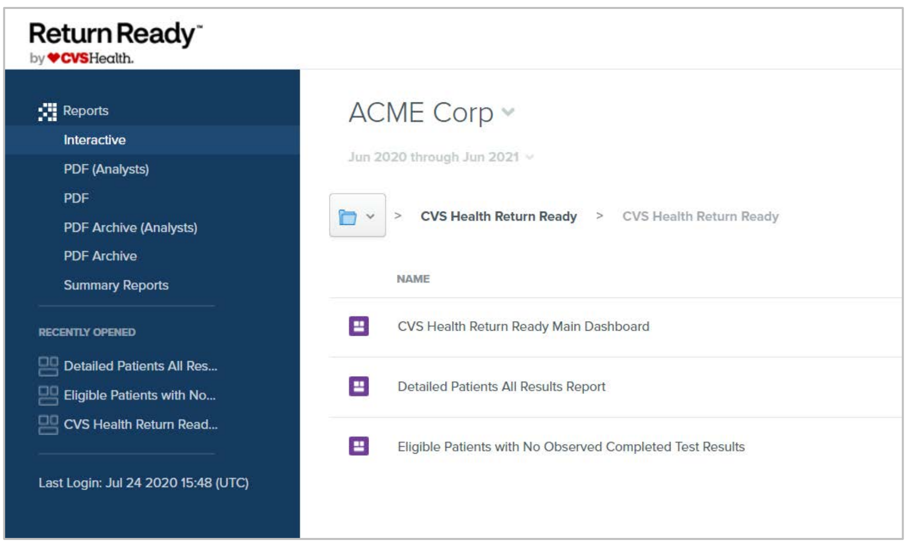
After selecting “CVS Health™ Return Ready® Main Dashboard,” you will be directed to a folder titled “CVS Health Return Ready.”

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.



Running your Return Ready Dashboards

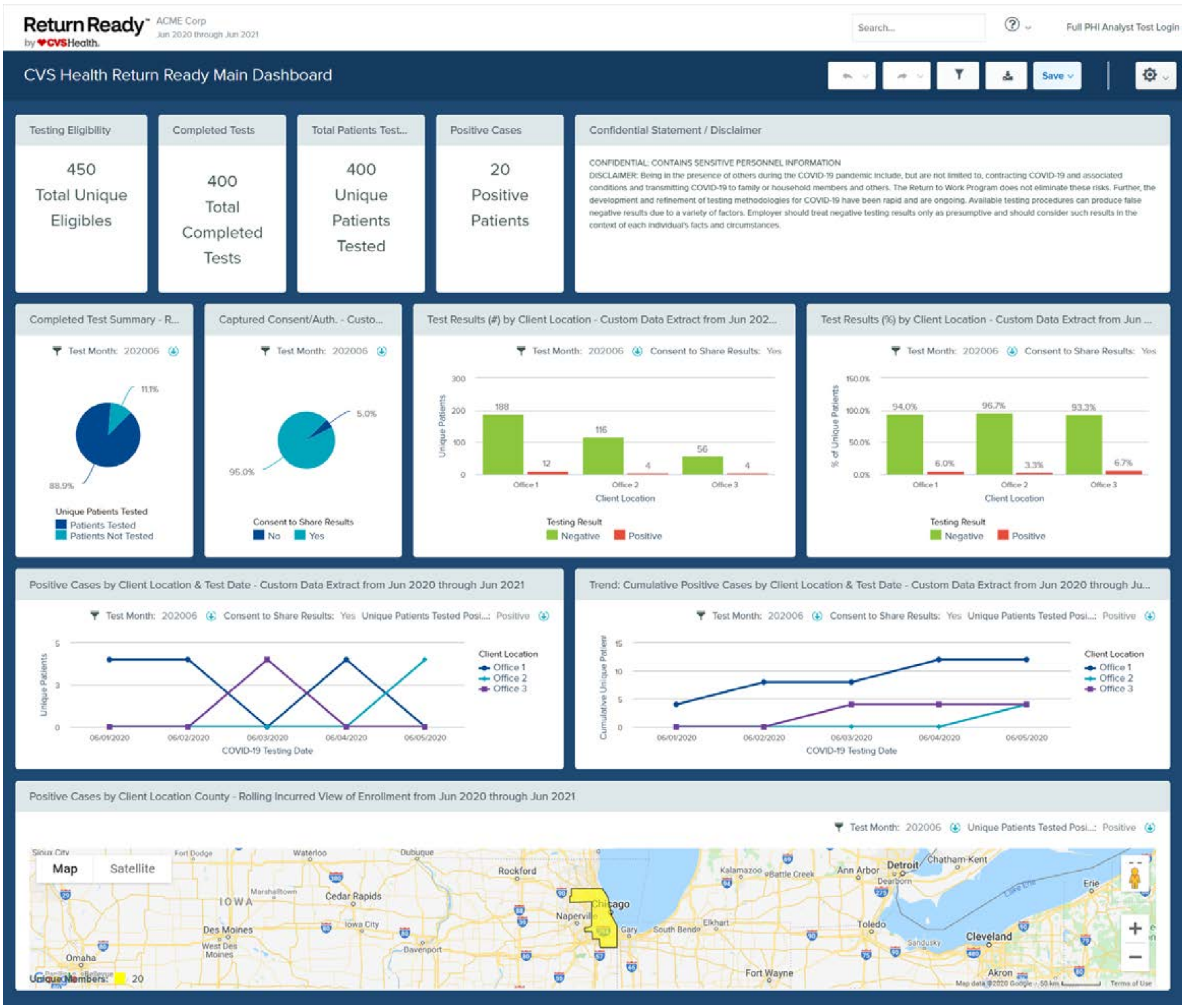
To run your dashboard, double-click on the dashboard title. The dashboard will open in a new browser tab.

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.

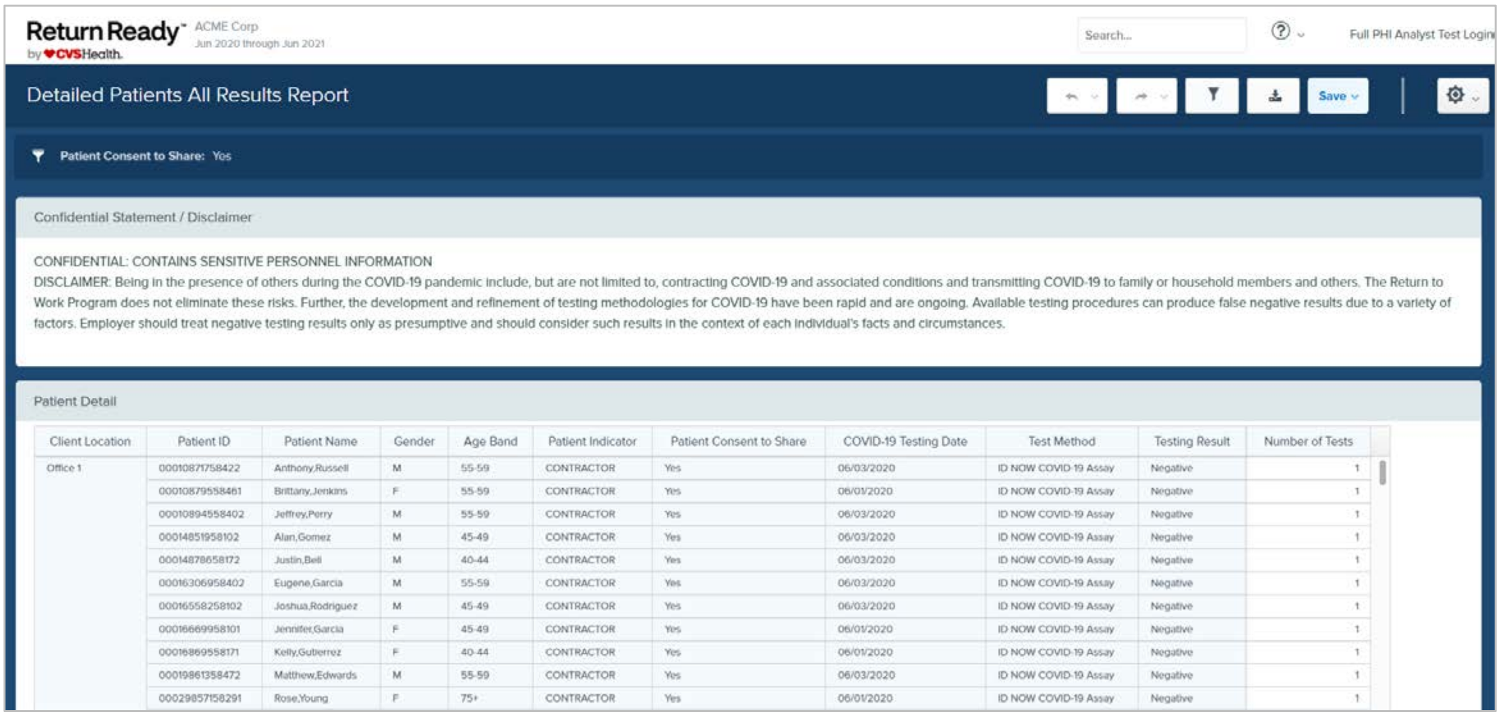
11. Positive Cases by Client Location County

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.



Return Ready™ by CVSHealth

ACME Corp

Jun 2020 through Jun 2021

Search...

Full PHI Analyst Test Login

Detailed Patients All Results Report

Save

Patient Consent to Share: Yes

Confidential Statement / Disclaimer

CONFIDENTIAL: CONTAINS SENSITIVE PERSONNEL INFORMATION

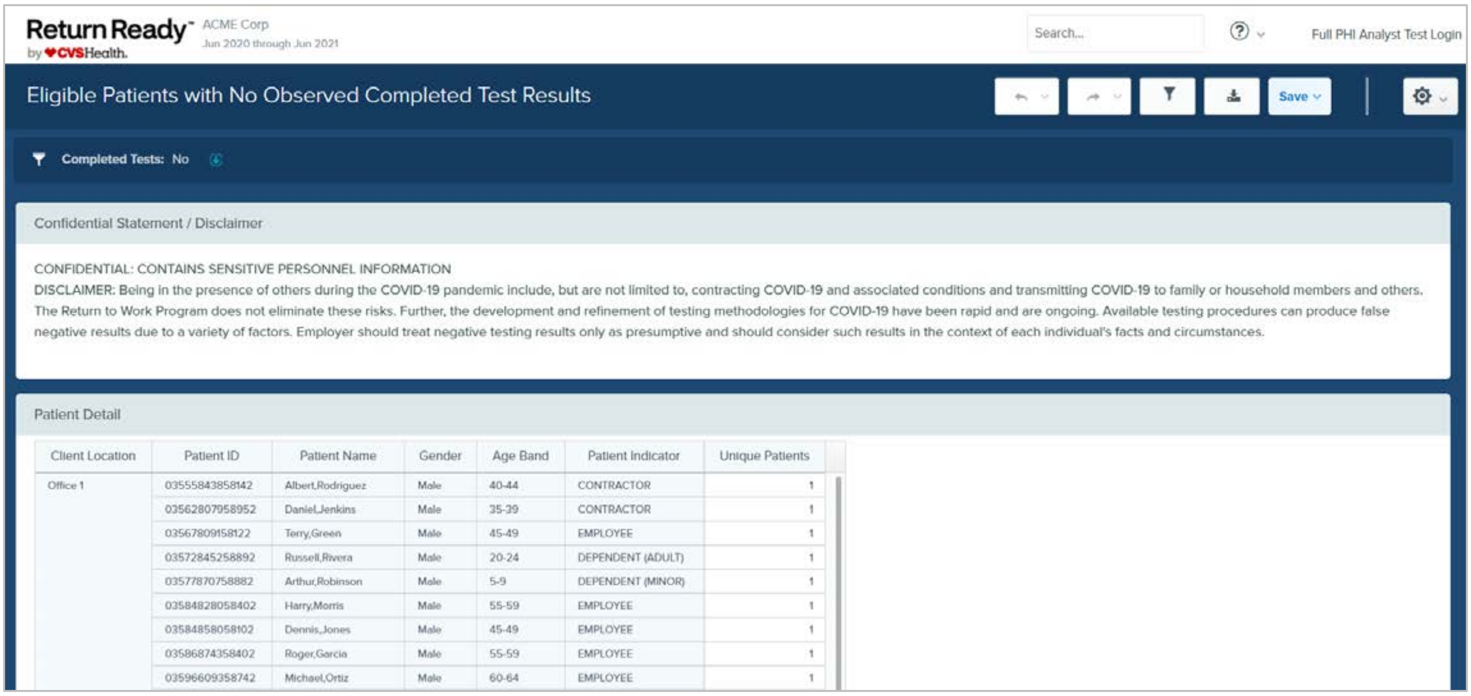
DISCLAIMER: Being in the presence of others during the COVID-19 pandemic include, but are not limited to, contracting COVID-19 and associated conditions and transmitting COVID-19 to family or household members and others. The Return to Work Program does not eliminate these risks. Further, the development and refinement of testing methodologies for COVID-19 have been rapid and are ongoing. Available testing procedures can produce false negative results due to a variety of factors. Employer should treat negative testing results only as presumptive and should consider such results in the context of each individual's facts and circumstances.

Patient Detail

Client Location	Patient ID	Patient Name	Gender	Age Band	Patient Indicator	Patient Consent to Share	COVID-19 Testing Date	Test Method	Testing Result	Number of Tests
Office 1	00010871758422	Anthony,Russell	M	55-59	CONTRACTOR	Yes	06/03/2020	ID NOW COVID-19 Assay	Negative	1
	00010879558461	Brittany,Jenkins	F	55-59	CONTRACTOR	Yes	06/01/2020	ID NOW COVID-19 Assay	Negative	1
	00010894558402	Jeffrey,Perry	M	55-59	CONTRACTOR	Yes	06/03/2020	ID NOW COVID-19 Assay	Negative	1
	00014851958102	Alan,Gomez	M	45-49	CONTRACTOR	Yes	06/03/2020	ID NOW COVID-19 Assay	Negative	1
	00014878658172	Justin,Bell	M	40-44	CONTRACTOR	Yes	06/03/2020	ID NOW COVID-19 Assay	Negative	1
	00016306958402	Eugene,Garcia	M	55-59	CONTRACTOR	Yes	06/03/2020	ID NOW COVID-19 Assay	Negative	1
	00016558258102	Joshua,Rodriguez	M	45-49	CONTRACTOR	Yes	06/03/2020	ID NOW COVID-19 Assay	Negative	1
	00016669958101	Jennifer,Garcia	F	45-49	CONTRACTOR	Yes	06/01/2020	ID NOW COVID-19 Assay	Negative	1
	00016869558171	Kelly,Gutierrez	F	40-44	CONTRACTOR	Yes	06/01/2020	ID NOW COVID-19 Assay	Negative	1
	00019861358472	Matthew,Edwards	M	55-59	CONTRACTOR	Yes	06/03/2020	ID NOW COVID-19 Assay	Negative	1
	00029857158291	Rose,Young	F	75+	CONTRACTOR	Yes	06/01/2020	ID NOW COVID-19 Assay	Negative	1

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.



Client Location	Patient ID	Patient Name	Gender	Age Band	Patient Indicator	Unique Patients
Office 1	03555843858142	Albert,Rodriguez	Male	40-44	CONTRACTOR	1
	03562807958952	Daniel,Jenkins	Male	35-39	CONTRACTOR	1
	03567809158122	Terry,Green	Male	45-49	EMPLOYEE	1
	03572845258892	Russell,Rivera	Male	20-24	DEPENDENT (ADULT)	1
	03577870758882	Arthur,Robinson	Male	5-9	DEPENDENT (MINOR)	1
	03584828058402	Harry,Morris	Male	55-59	EMPLOYEE	1
	03584858058102	Dennis,Jones	Male	45-49	EMPLOYEE	1
	03586874358402	Roger,Garcia	Male	55-59	EMPLOYEE	1
	03596609358742	Michael,Ortiz	Male	60-64	EMPLOYEE	1

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

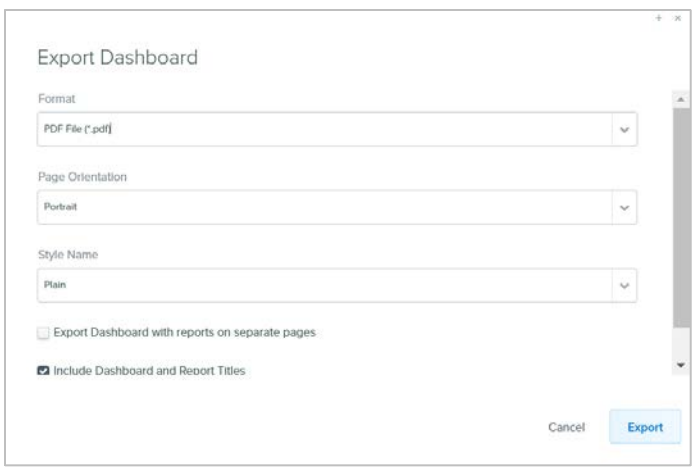
Exporting

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:

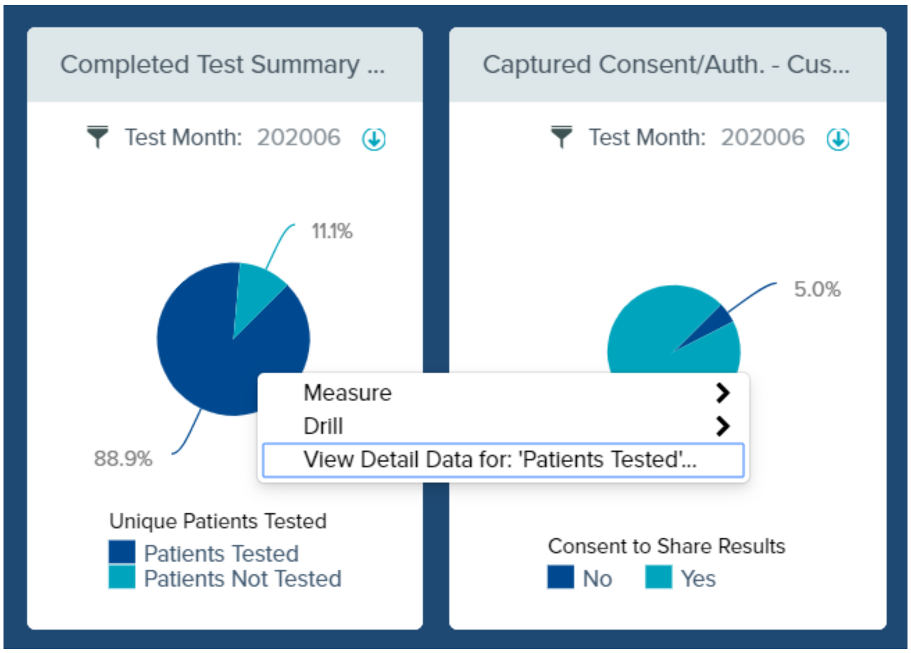
1. Click the export button in the top right corner of the screen to display the Export Dashboard window.

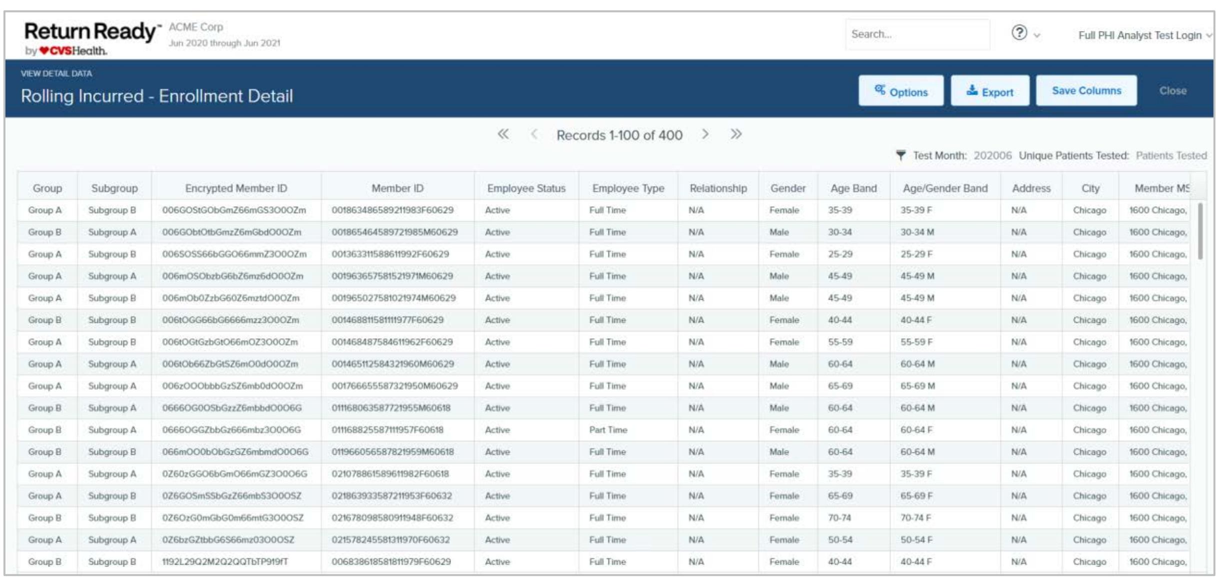
2. Select a **Format**. Options include PDF, Word, and Excel.
3. Choose a **Page Orientation** (Portrait or Landscape).
4. Leave the other fields to the default options.
5. Click **Export.**



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.





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	006GObtOtbGmzZ6mGbdO0OZm	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	006mOb0ZzbG60Z6mztdO0OZm	001965027581021974M60629	Active	Full Time	N/A	Male	45-49	45-49 M	N/A	Chicago	1600 Chicago,
Group B	Subgroup B	006tOGG66bG6666mzz3O0OZm	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	006tOb66ZbGtSZ6mO0dO0OZm	001465112584321960M60629	Active	Full Time	N/A	Male	60-64	60-64 M	N/A	Chicago	1600 Chicago,
Group A	Subgroup A	006zOOObbbGzSZ6mb0dO0OZm	001766655587321950M60629	Active	Full Time	N/A	Male	65-69	65-69 M	N/A	Chicago	1600 Chicago,
Group B	Subgroup A	0666OG0OSbGzzZ6mbbdO0O6G	011168063587721955M60618	Active	Full Time	N/A	Male	60-64	60-64 M	N/A	Chicago	1600 Chicago,
Group B	Subgroup A	0666OGGZbbGz666mbz3O0O6G	011168825587111957F60618	Active	Part Time	N/A	Female	60-64	60-64 F	N/A	Chicago	1600 Chicago,
Group B	Subgroup B	066mOO0bObGzGZ6mbmdO0O6G	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	0Z6GOSmSSbGzZ66mbS3O0OSZ	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	0Z6bzGZtbbG6S66mz03O0OSZ	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,

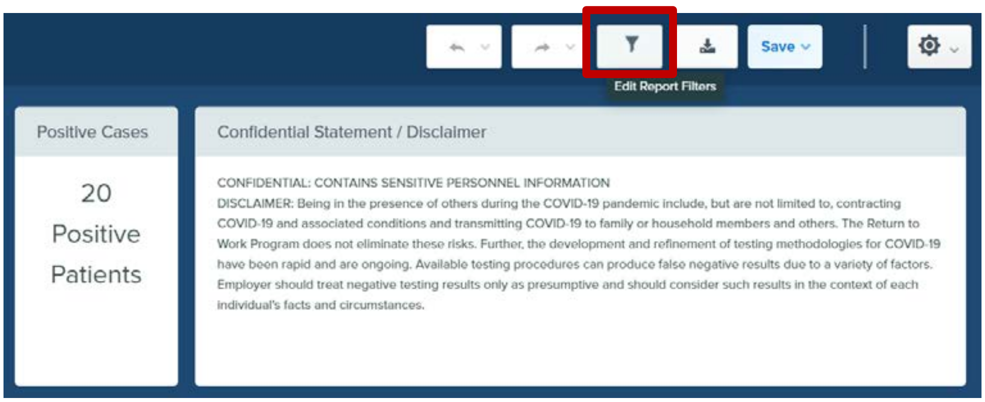
Filtering

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.

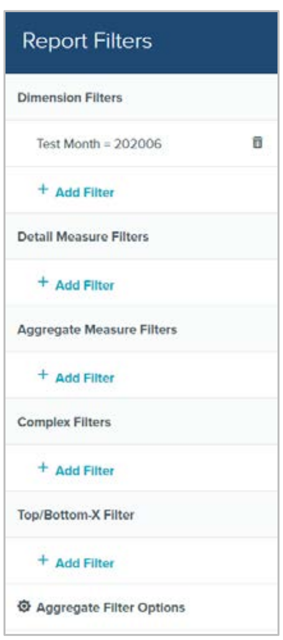
Examples:

- **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.



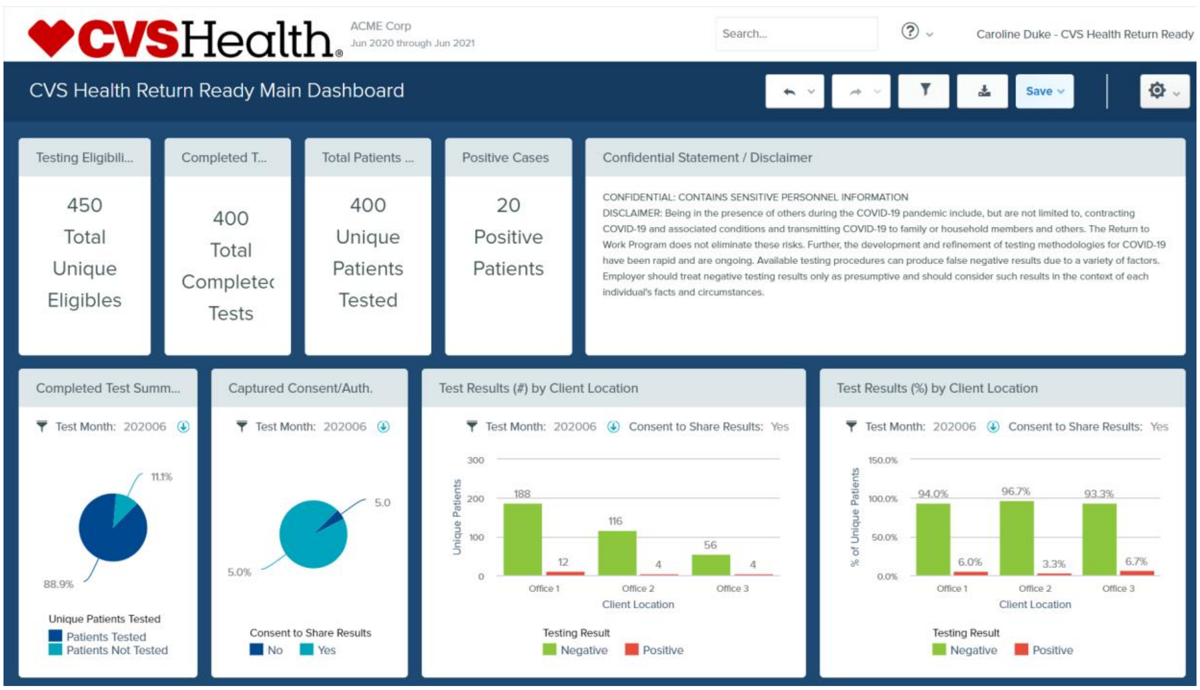
The Report Filters screen will display. The left pane displays the currently applied filters and lets you perform filtering options. Use this pane to add, edit, and remove filters. Given the nature of the data available in the Return Ready reporting tool, only **Dimension** filters are relevant



Adding a Dimension Filter

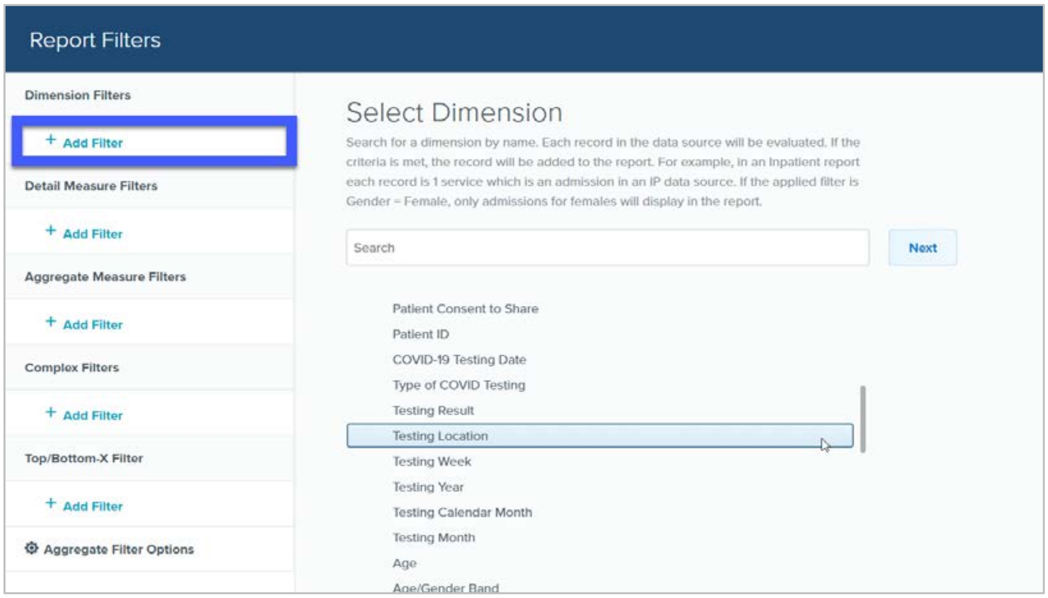
To add a Dimension filter, click **+ Add Filter** beneath the desired filter type. When all filters are added, edited, or deleted, click **Save**. To remove an applied filter, click the trash can icon to the right of the filters. Below is a step by step instruction on how to apply a Dimension filter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

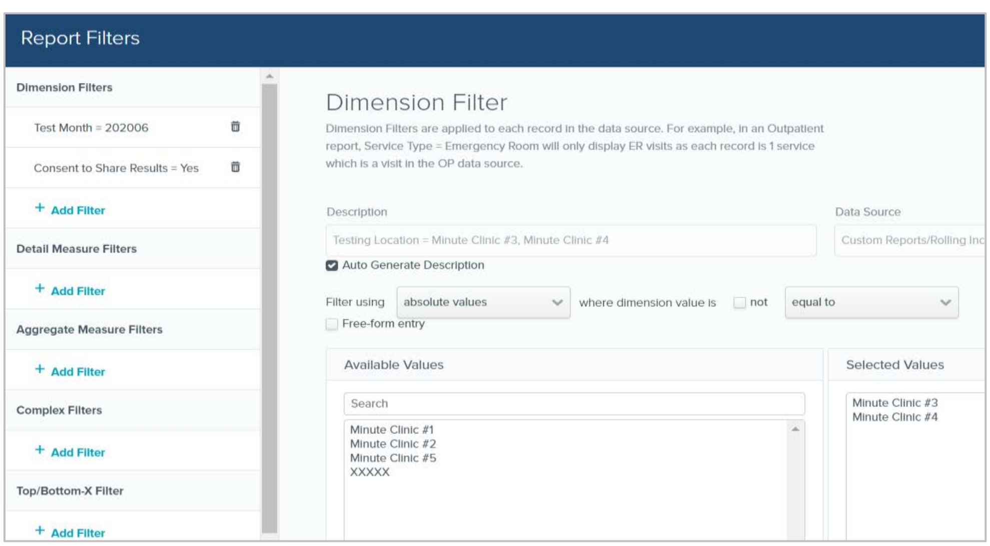


2. Click the Edit Report Filters  button located beneath the header.

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**.



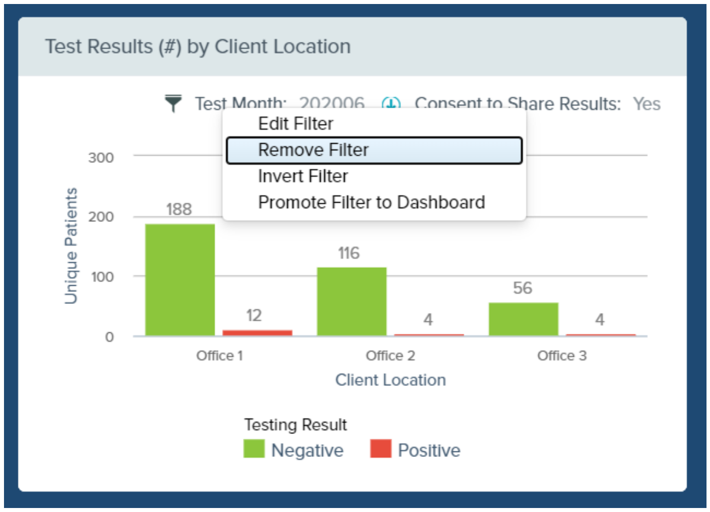
4. Select the categorical values you would like to focus on.
   a. Use a search to locate available values,
   b. Choose dimension values (use CTRL + click to select multiple values) and click Add Selected. Click Add All to make all Available Values become Selected Values
   c. Additionally, you can 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.



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

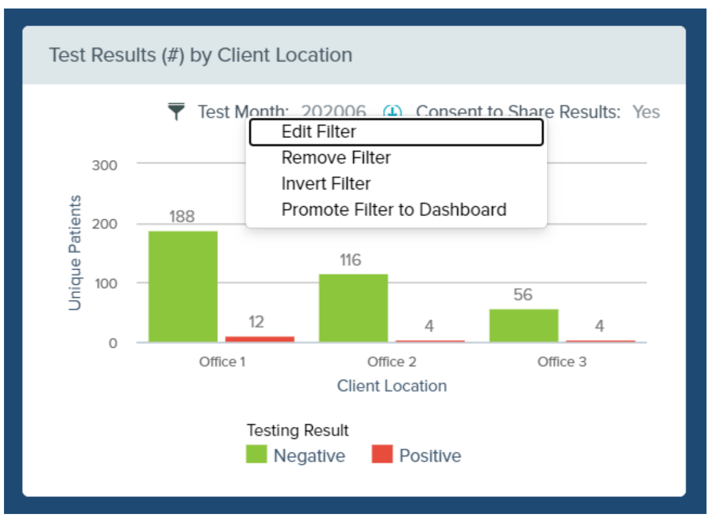
Removing an Existing Filter

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



Editing an Existing Filter

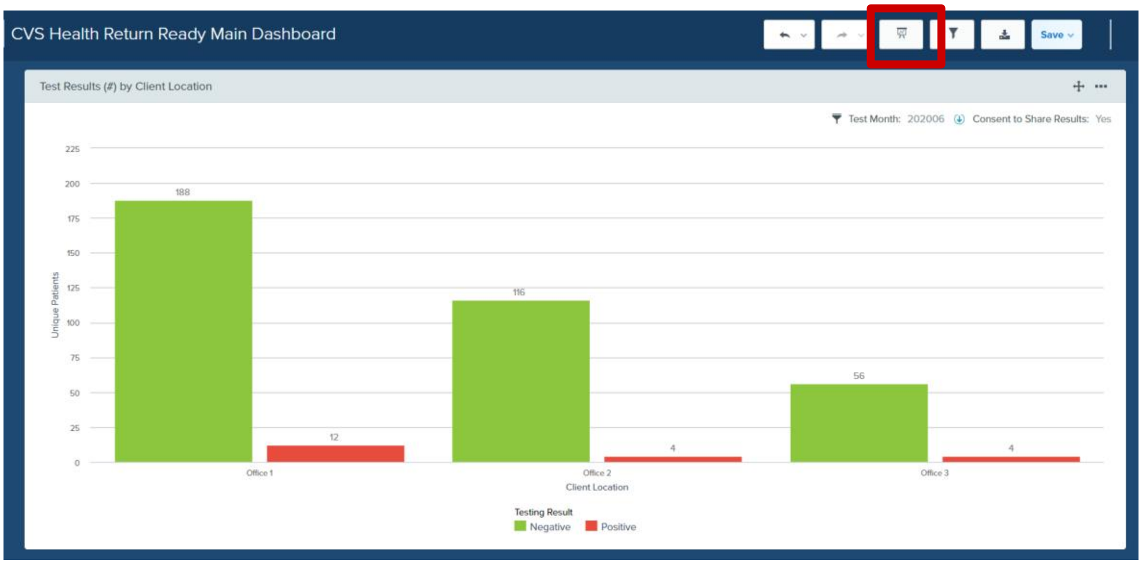
To edit an existing filter, left click on the filter and select **Edit Filter**. This will display an Edit Filter window where you can modify the filter.



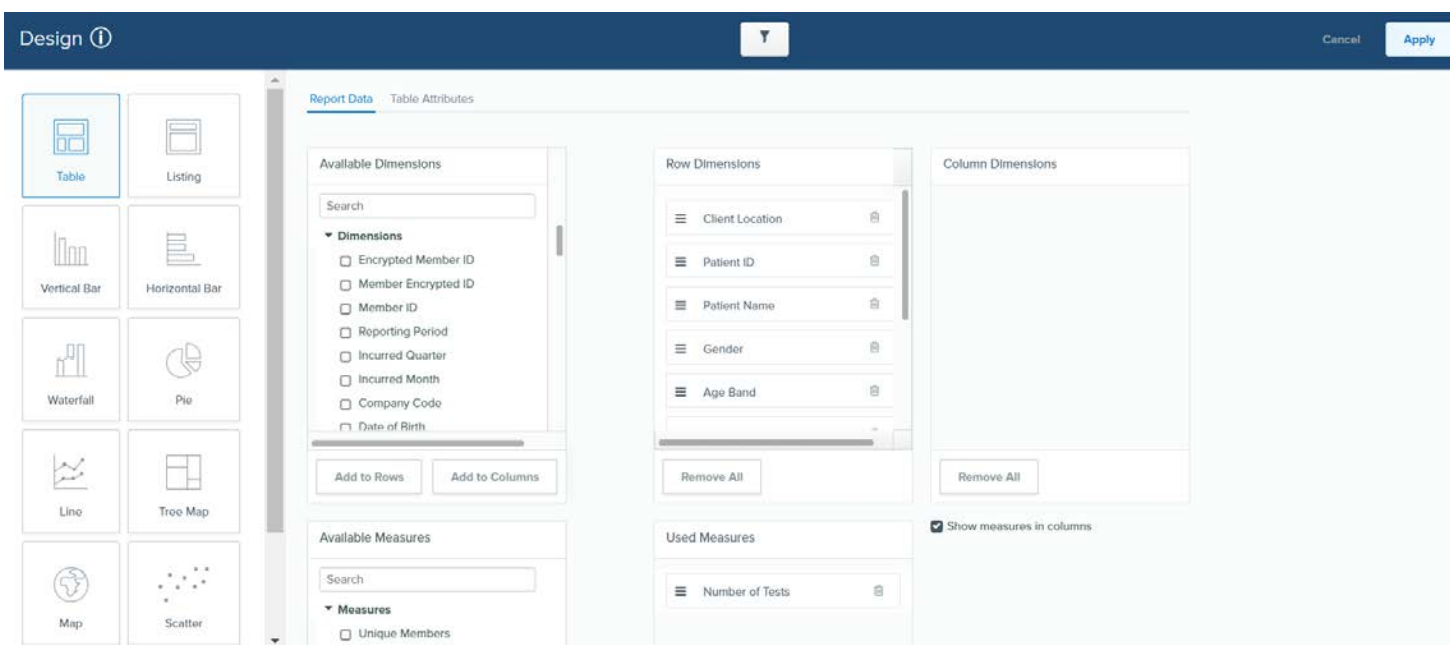
Editing the Return Ready Dashboards

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.



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.



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.