



WELCOME TO

Getting Started with the CVS Health[®] Return Ready[™] Reporting Tool

**Part Two: Filter, Redesign and Save Personal
Reports and Dashboards**



Learning Objectives Part 2

- Add Dimension Filters
- View Detail Data
- Modify Report Design
- Save Personal Dashboards / Reports



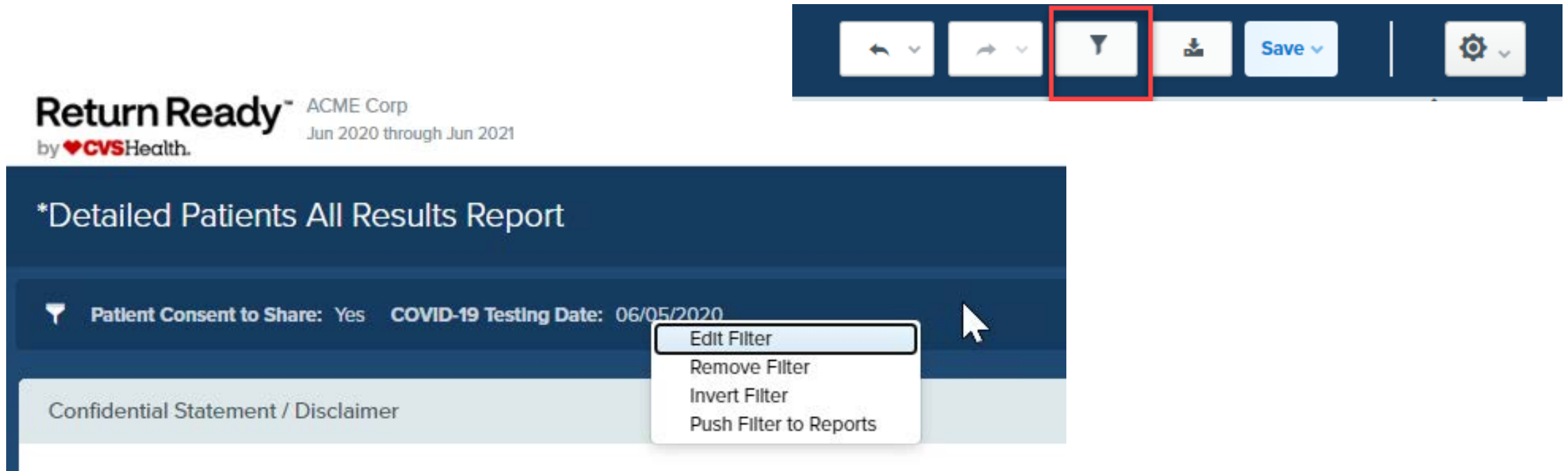


How to...

Filter data

Edit Existing Filter or Add Filters

- Left Click on the Filter in the Filter Area
- Use the Funnel Command to Edit/Add Filters



The screenshot displays a web application interface. At the top right, a dark blue navigation bar contains several icons: a left arrow, a right arrow, a funnel icon (highlighted with a red box), a download icon, a 'Save' button, and a settings gear icon. Below this, the main content area has a dark blue header with the text 'Return Ready™ ACME Corp' and 'by CVSHealth. Jun 2020 through Jun 2021'. The main title is '*Detailed Patients All Results Report'. Below the title, there is a filter bar with a funnel icon and the text 'Patient Consent to Share: Yes COVID-19 Testing Date: 06/05/2020'. A mouse cursor is hovering over the funnel icon, which has opened a white context menu with the following options: 'Edit Filter', 'Remove Filter', 'Invert Filter', and 'Push Filter to Reports'. At the bottom left of the main content area, there is a light blue bar with the text 'Confidential Statement / Disclaimer'.

Relative Filter Values

- Most recent Testing Month or Most recent COVID-19 Testing Date

Dimension Filter

Dimension Filters are applied to each record in the data source. For example, in an Outpatient 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.

Description: COVID-19 Testing Date = 06/05/2020

Data Source: Custom Reports/Rolling Incurred - Custom Table 1

Auto Generate Description

Filter using: absolute values (dropdown menu open showing absolute values and relative values)

where dimension value is: not equal to

Available Values: 06/01/2020, 06/02/2020, 06/03/2020, 06/04/2020

Selected Values: 06/05/2020

Sort Order: Default

Buttons: Add Selected, Add All, Remove Selected, Remove All

Filter available values: No filtering

'All Values' Label: All COVID-19 Testing Dates

Auto Generate Label

Buttons: Forget Filter, Add Filter

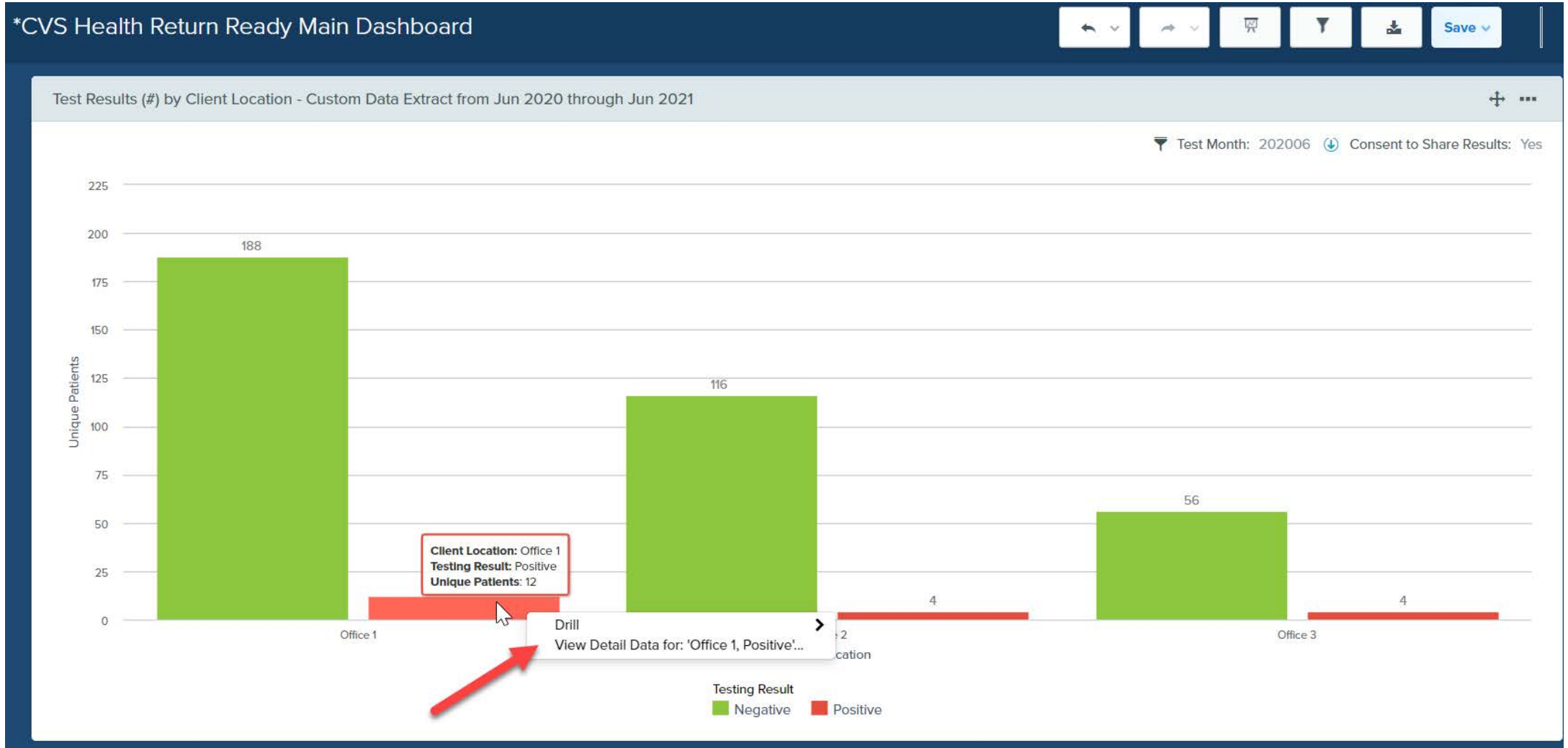


How to...

View detail data



View Detail Data



View Detail Data

VIEW DETAIL DATA

Rolling Incurred - Custom Table 1

Options

Export

Save Columns

Close

Records 1-12 of 12

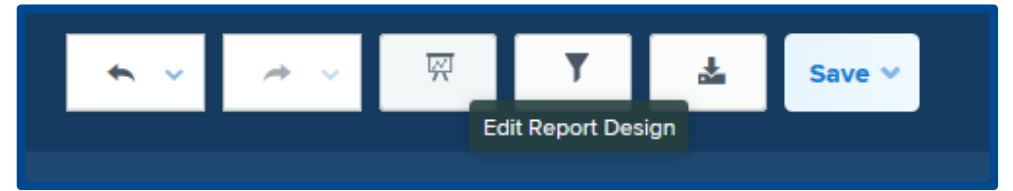
Test Month: 202006 Consent to Share Results: Yes Client Location: Office 1 Testing Result: Positive

Patient Name	COVID-19 Testing Date	Testing Result	Testing Location	Age/Gender Band	Patient Indicator
Nancy,Thompson	06/01/2020	Positive	Minute Clinic #1	25-29 F	CONTRACTOR
Megan,Butler	06/01/2020	Positive	Minute Clinic #1	30-34 F	CONTRACTOR
Sara,Carter	06/01/2020	Positive	Minute Clinic #1	60-64 F	CONTRACTOR
Julia,Hill	06/01/2020	Positive	Minute Clinic #1	60-64 F	CONTRACTOR
Thomas,Campbell	06/04/2020	Positive	Minute Clinic #4	35-39 M	EMPLOYEE
Andrew,Cruz	06/04/2020	Positive	Minute Clinic #4	35-39 M	EMPLOYEE
Kenneth,Murphy	06/04/2020	Positive	Minute Clinic #4	50-54 M	EMPLOYEE
Bryan,Price	06/04/2020	Positive	Minute Clinic #4	40-44 M	EMPLOYEE
Katherine,Bennett	06/02/2020	Positive	Minute Clinic #2	60-64 F	EMPLOYEE
Catherine,Brooks	06/02/2020	Positive	Minute Clinic #2	60-64 F	EMPLOYEE
Olivia,Hernandez	06/02/2020	Positive	Minute Clinic #2	45-49 F	EMPLOYEE
Stephanie,Rogers	06/02/2020	Positive	Minute Clinic #2	55-59 F	EMPLOYEE

How to...

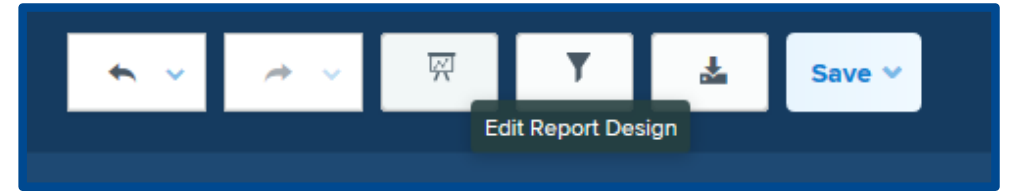
Redesign and modify reports

Modify Report Layout – Design



A screenshot of the 'Design' report layout editor. The interface is titled 'Design' with an information icon. On the left is a palette of visualization options: Table, Listing (highlighted with a red box), Vertical Bar, Horizontal Bar, Waterfall, Pie, Line, Tree Map, Map, Scatter, and Bubble. The main workspace is divided into three sections: 'Available Dimensions' (listing fields like Encrypted Member ID, Member ID, etc.), 'Available Measures' (listing Unique Members, Count of Months, etc.), 'Row Dimensions' (containing COVID-19 Testing Date, Testing Result, Patient Name, Age/Gender Band, Patient Indicator, highlighted with a red box), and 'Column Dimensions' (currently empty). A 'Used Measures' section at the bottom contains 'Number of Tests' (highlighted with a red box). A 'Show measures in columns' checkbox is checked. At the top of the workspace, there are tabs for 'Report Data' and 'Table Attributes', and a funnel icon.

Modify Report Layout – Design



Return Ready™ ACME Corp
by CVS Health. Jun 2020 through Jun 2021

Search... ? Deb Baxter - CVS Health Return Ready ▾

*Detailed Patients All Results Report

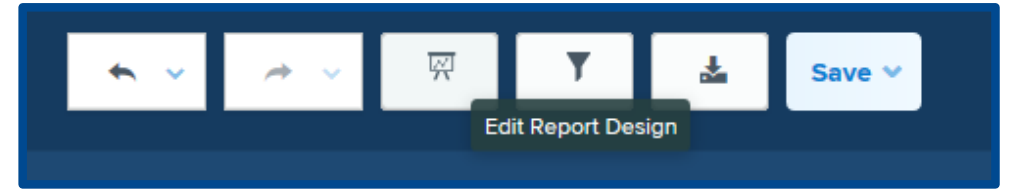


Patient Consent to Share: Yes

Patient Detail

COVID-19 Testing Date	Testing Result	Patient Name	Age/Gender Band	Patient Indicator	Number of Tests
06/01/2020	Negative	Alice,Roberts	35-39 F	EMPLOYEE	1
06/01/2020	Negative	Amanda,Hughes	30-34 F	EMPLOYEE	1
06/01/2020	Negative	Angela,Sullivan	45-49 F	EMPLOYEE	1
06/01/2020	Negative	Ann,Butler	25-29 F	EMPLOYEE	1
06/01/2020	Negative	Ann,Lee	45-49 F	EMPLOYEE	1
06/01/2020	Negative	Ann,Mitchell	35-39 F	EMPLOYEE	1
06/01/2020	Negative	Ann,Morales	50-54 F	EMPLOYEE	1
06/01/2020	Negative	Brenda,Price	55-59 F	EMPLOYEE	1
06/01/2020	Negative	Brittany,Jenkins	55-59 F	CONTRACTOR	1
06/01/2020	Negative	Carol,Perry	25-29 F	EMPLOYEE	1
06/01/2020	Negative	Christina,Cox	40-44 F	EMPLOYEE	1
06/01/2020	Negative	Christina,Lopez	60-64 F	EMPLOYEE	1
06/01/2020	Negative	Cynthia,Lopez	60-64 F	EMPLOYEE	1
06/01/2020	Negative	Deborah,Morgan	25-29 F	EMPLOYEE	1
06/01/2020	Negative	Deborah,Young	60-64 F	EMPLOYEE	1
06/01/2020	Negative	Debra,Gutierrez	55-59 F	EMPLOYEE	1
06/01/2020	Negative	Debra,Turner	40-44 F	EMPLOYEE	1
06/01/2020	Negative	Denise,Myers	55-59 F	EMPLOYEE	1
06/01/2020	Negative	Denise,Perry	50-54 F	EMPLOYEE	1
06/01/2020	Negative	Diana,Davis	45-49 F	EMPLOYEE	1
06/01/2020	Negative	Diana,Hernandez	45-49 F	EMPLOYEE	1
06/01/2020	Negative	Donna,Flores	30-34 F	EMPLOYEE	1

Modify Report Layout – Design



Available Dimensions

▼ Dimensions

- Encrypted Member ID
- Member Encrypted ID
- Member ID
- Reporting Period
- Incurred Quarter
- Incurred Month
- Company Code
- Date of Birth

Add to Rows Add to Columns

Row Dimensions

- ☰ COVID-19 Testing Date 🗑️
- ☰ Client Location 🗑️

Remove All

Column Dimensions

- ☰ Testing Result 🗑️

Remove All

Available Measures

▼ Measures

- Unique Members
- Count of Months
- Test Result Positive

Used Measures

- ☰ Number of Tests 🗑️

Show measures in columns

Testing Result		Negative	Positive	Summary
COVID-19 Testing Date	Client Location	Number of Tests	Number of Tests	Number of Tests
06/01/2020	Office 1	76	4	80
	Office 2	60		60
06/03/2020	Office 1	40		40
	Office 3	36	4	40
06/04/2020	Office 1	56	4	60
	Office 2	20		20
06/05/2020	Office 2	36	4	40
	Office 3	20		20
Summary		360	20	380

Modify Report Layout – Summary Values On/Off

Patient Detail

Testing Result		Negative	Positive
COVID-19 Testing			
06/01/2020			
06/02/2020	Office 1		
	Office 2		
06/03/2020	Office 1		
	Office 3	36	4
06/04/2020	Office 1	56	4
	Office 2	20	
06/05/2020	Office 2	36	4
	Office 3	20	
Summary		360	20

Dimension >

Calculated Dimension Value >

Commentary for 'Testing Result'...

Attributes of 'Testing Result'...

Change 'Testing Result'

Remove 'Testing Result'

Expand 'Testing Result' By...

Summary Values On/Off for 'Testing Result'

Filter on Testing Result...

Create a New Dynamic Grouping Dimension based on Testing Result...

Patient Detail

Testing Result		Negative	Positive	Summary
COVID-19 Testing Date	Client Location	Number of Tests	Number of Tests	Number of Tests
06/01/2020	Office 1	76	4	80
06/02/2020	Office 1	16	4	20
	Office 2	60		60
06/03/2020	Office 1	40		40
	Office 3	36	4	40
06/04/2020	Office 1	56	4	60
	Office 2	20		20
06/05/2020	Office 2	36	4	40
	Office 3	20		20
Summary		360	20	380



How to...

Save

Save Personal Templates

**What is Stored in
a Saved Report
or Dashboard**

**Templates:
Personal and
Global**

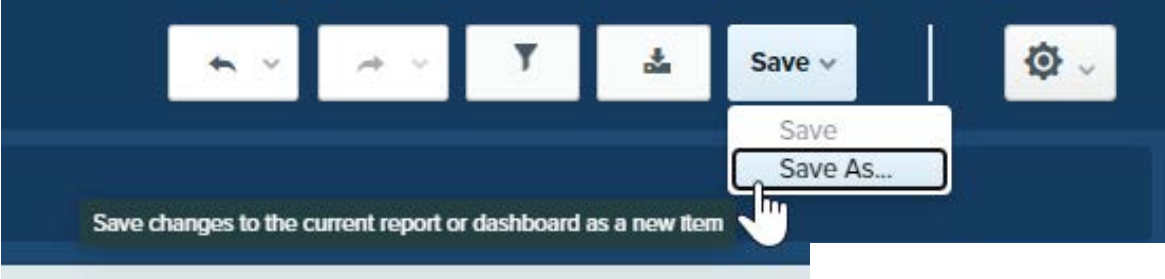
**You cannot overwrite a
Global*

**Saving a
Personal Report
or Dashboard**

**Deleting and
Moving Personal
Reports,
Dashboards and
Folders**



Save – Personal / You cannot overwrite global dashboards



Save As

Level
 Personal Group Global

Name
Results by Date and Location

Location
CVS Health Return Ready/CVS Health Return Ready Browse...

Data Source(s)
Custom Reports:Rolling Incurred - Custom Table 1

Cancel Save



Thank you!
