

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
- Add Placeholder Filters
- Isolate / Exclude Dimension Values
- 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 to Edit or Remove Existing Filters
- Use the Funnel Command to Edit/Add/Remove Filters

> Main Menu > CVS Health Return Ready > CVS Health Return Ready > Eligible Patients with No Observed Completed Test Results

← Eligible Patients with No Observed Completed Test Results

SAVE ▾ FILTERS EXPORT ... MORE

Completed Tests: No

Eligible Patients without Complete Test Results in the Most Current Month - Rolling Incurred View of Enrollment from Jun 2020 through Jun 2021

Month: 202101

EDIT FILTER

REMOVE FILTER

INVERT FILTER

PROMOTE FILTER TO DASHBOARD

Client Location	Name	Gender	Age Band	Patient Indicator	Unique Patients
OFFICE 1	ell	Male	55-59	CONTRACTOR	1
	s	Female	55-59	CONTRACTOR	1
		Male	55-59	CONTRACTOR	1
		Male	45-49	CONTRACTOR	1

How to...

View detail data

View Detail Data

> Main Menu > CVS Health Return Ready > CVS Health Return Ready > CVS Health Return Ready Main Dashboard

← **CVS Health Return Ready Main Dashboard**

SAVE ▾

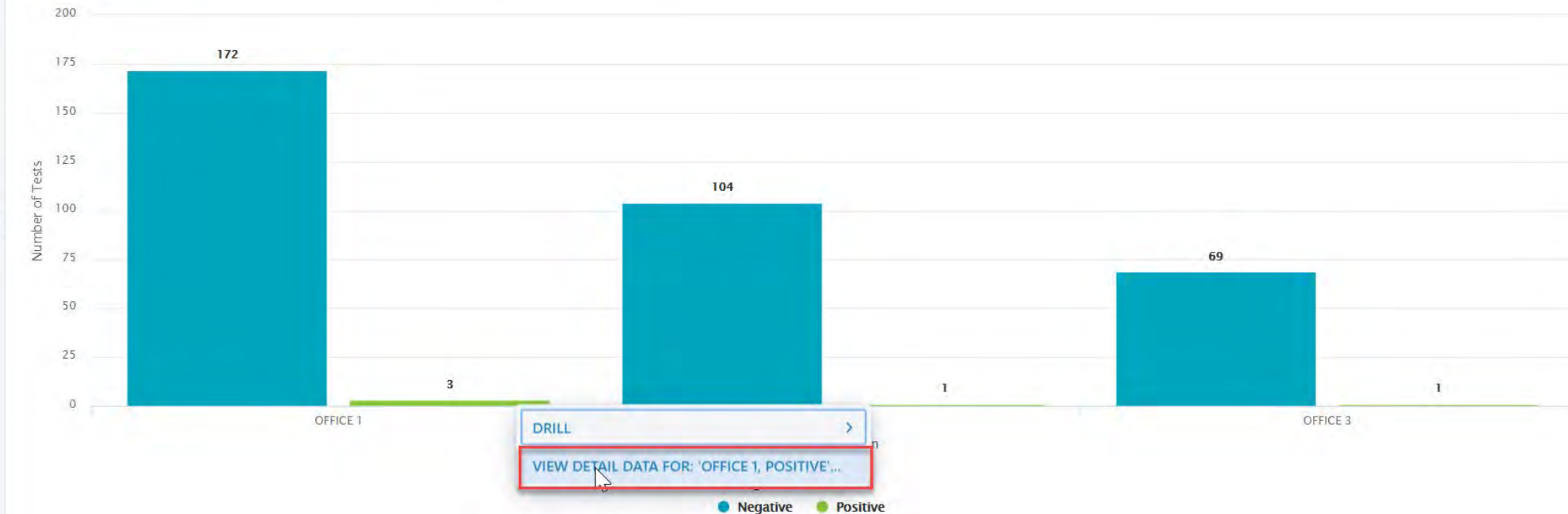
FILTERS

EXPORT

MORE

Test Results (#) by Client Location - Custom Data Extract from Jun 2020 through Jun 2021

Test Month: 202101



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View Detail Data

Options Rolling Incurred - Custom Table 1

Records 1-3 of 3

Test Month: 202101 Testing Result: Positive Client Location: OFFICE 1

Patient Name	COVID-19 Testing Date	Testing Result	Testing Location	Age/Gender Band	Patient Indicator
Willie Clark	01/05/2021	Positive	Minute Clinic #9	25-29 M	EMPLOYEE
Frances Diaz	01/05/2021	Positive	Minute Clinic #6	55-59 F	EMPLOYEE
Catherine Roberts	01/05/2021	Positive	Minute Clinic #7	50-54 F	EMPLOYEE

OPTIONS EXPORT SAVE COLUMNS


CLOSE

How to...

Redesign and modify reports

Modify Report Layout – Design

Main Menu > CVS Health Return Ready > CVS Health Return Ready > Detailed Patients All Results Report

←  Detailed Patients All Results Report

SAVE ▾

 FILTERS

 EXPORT

... MORE

Patient Detail - Custom Data Extract from Jun 2020 through Jun 2021

 MINIMIZE

 DESIGN

... MORE

⏪ ⏩ Rows 1 to 250 (of 1913) ⏪ ⏩

Client Location	Patient ID	Patient Name	Gender	Age Band	Patient Indicator	Patient Consent to Share	COVID-19 Testing Date	Test Method	Test Result
OFFICE 1	00010871758422	Anthony Russell	M	55-59	CONTRACTOR	Yes	06/03/2020	POC	M
							10/05/2020	POC	M
	00010879558461	Brittany Jenkins	F	55-59	CONTRACTOR	Yes	06/01/2020	POC	M
							10/05/2020	POC	M
	00010894558402	Jeffrey Perry	M	55-59	CONTRACTOR	Yes	06/03/2020	POC	M
							10/05/2020	POC	M
	00014851958102	Alan Gomez	M	45-49	CONTRACTOR	Yes	06/03/2020	POC	M
							10/05/2020	POC	M

Modify Report Layout – Design

Design

Table | **Listing**

Vertical Bar | Horizontal Bar

Waterfall | Pie

Line | Tree Map

Map | Scatter

Primary Analytic Focus: Rolling Incurred - Custom Table 1

Report Data Listing Attributes

Available Dimensions | **Used Dimensions**

Search

Dimensions

- Encrypted Member ID
- Member ID
- Reporting Period
- Incurred Quarter

ADD TO DIMENSIONS

Used Dimensions

- COVID-19 Testing Date
- Testing Result
- Patient Name
- Gender
- Age Band
- Patient Indicator

REMOVE ALL

Available Measures | **Used Measures**

Search

Measures

- Unique Members

Used Measures

- Number of Tests

Edit Report Filters CANCEL APPLY

Modify Report Layout – Listing


← *Detailed Patients All Results Report

Patient Detail - Custom Data Extract from Jun 2020 through Jun 2021

Rows 1 to 250 (of 1910)

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

Modify Report Layout – Design

←  *Detailed Patients All Results Report

Patient Detail - Custom Data Extract from Dec 2020 through Dec 2021

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	40		40
06/08/2020	OFFICE 1	69	1	70
06/09/2020	OFFICE 1	16	1	17
	OFFICE 2	52	1	53
06/10/2020	OFFICE 1	35		35

Modify Report Layout – Summary Values On/Off

← *Detailed Patients All Results Report ↩️ ⌵

Patient Detail - Custom Data Extract from Dec 2020 through Dec 2021

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	DIMENSION >		ATTRIBUTES OF 'CLIENT LOCATION'...
	Summary	CALCULATED DIMENSION VALUE >		CHANGE 'CLIENT LOCATION'
06/02/2020	OFFICE 1	COMMENTARY FOR 'CLIENT LOCATION'...		REMOVE 'CLIENT LOCATION'
	OFFICE 2			EXPAND 'CLIENT LOCATION' BY...
	Summary	76	4	SUMMARY VALUES ON/OFF FOR 'CLIENT LOCATION'
06/03/2020	OFFICE 1	40		FILTER ON 'CLIENT LOCATION'...
	OFFICE 3	36	4	CREATE A NEW DYNAMIC GROUPING DIMENSION BASED ON CLIENT LOCATION...
	Summary	76	4	
06/04/2020	OFFICE 1	56	4	
	OFFICE 2	20		
	Summary	76	4	

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

> Main Menu > CVS Health Return Ready > CVS Health Return Ready > Detailed Patients All Results Report

← *Detailed Patients All Results Report

SAVE
SAVE
SAVE AS

Patient Detail - Custom Data Extract from Dec 2020 through Dec 2021

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

Save As

Name
Results by Date and Location

Level •
 Personal Group Global

Location
CVS Health Return Ready/CVS Health Return Ready [CHANGE](#)

CANCEL SAVE

Thank you!
