Overview

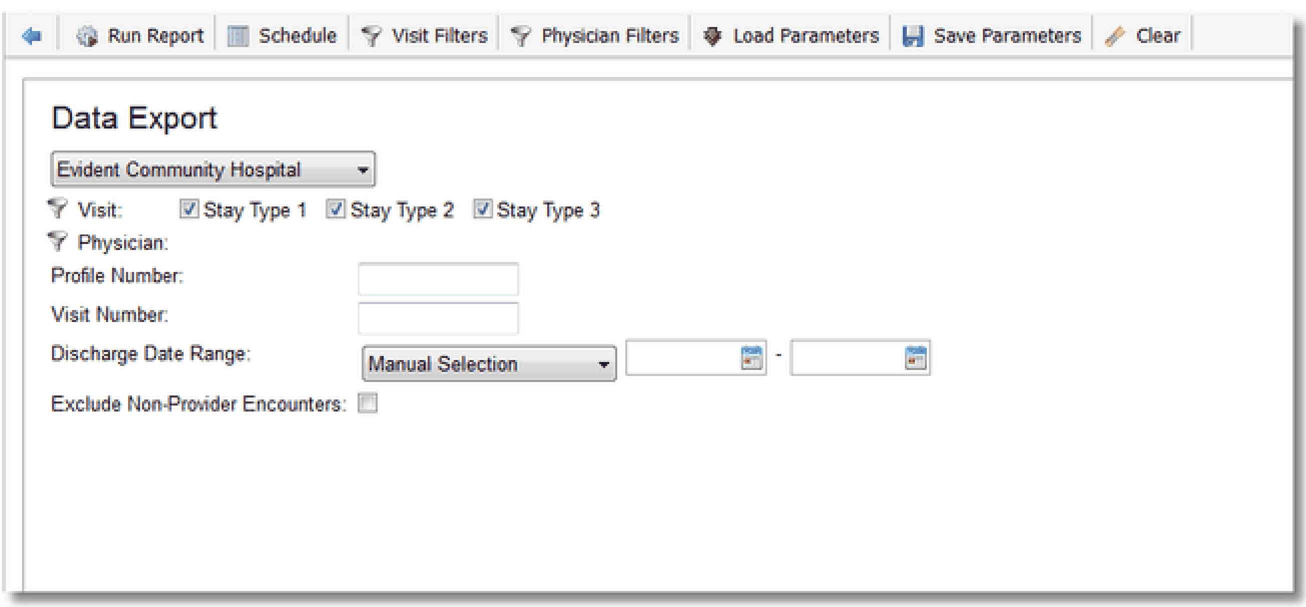
The Data Export report was created for Meaningful Use and is used for creating an export summary, or a set of export summaries, for a patient(s). This report may be run by a facility at any time on demand or at a scheduled day and time. Users in the System Administrator role will automatically have access to this report by default. If users are not in the System Administrator role and need access to the report, the Data Export application will need be to set to allow in Identity Management. This report may only be accessed if using Thrive UX.

Data Export Report

Usage

To begin using the Data Export report, it will need to be added to the Report Dashboard. To access, select **Report Dashboard** from the navigation panel.

Select **Report Dashboard** > **Data Export** > **Run**



Data Export

Listed below is an explanation of each parameter.

- **Facility:** Only Facilities selected for access under the signed in login will be available for selection. The facility the login is currently logged in to will default.

- **Visit:** If any visit filters have been added by the signed in login, check-boxes for each filter will display. The check-boxes will default to checked, but may be unchecked as needed. The selected filters will be included in the report. To add or remove filters, select **Visit Filters** on the action bar.

- **Physician:** If any physician filters have been added by the signed in login, check-boxes for each filter will display. The check-boxes will default to checked, but may be unchecked as needed. The selected filters will be included in the report. To add or remove filters, select **Physician Filters** on the action bar.

- **Profile Number:** A patient's profile number may be populated in this field. If this field is left blank, the report will run for all patient profiles within the selected date range.

- **Visit Number:** A patient's visit number may be populated in this field. If this field is left blank, the report will run for all patient visits within the selected date range.

- **Discharge Date Range:** A date range may be selected from the drop-down or left blank. The options to choose from the drop-down are as follows:
  - Manual Selection
  - Previous Day
  - Previous Week
  - Previous Month
  - Previous Quarter
  - Previous Calendar Year
  - Previous Fiscal Year
  - Last 7 Days
  - Last 30 Days
  - Last 90 Days

NOTE: *If Manual Selection is selected, either a beginning date and ending date must be entered, or the beginning date and end date must be left blank.*

- **Exclude Non-Provider Encounters:** Select this option to include clinic accounts without the Provider Encounter option selected on the visit.

Listed below is an explanation of each option on the action bar.

- **Run Report:** Select this option once all parameters have been selected for the report. See the Run Report 3 section of this document for more information on this option.

- **Schedule:** Select this option to schedule the report based on the parameters selected. See the Schedule 9 section of this document for more information on this option.

- **Visit Filters:** Select this option to add or create filters for patient visits.

- **Physician Filters:** Select this option to add or create filters for physicians.

- **Load Parameters:** Select this option to load any previously saved parameters for the report.

- **Save Parameters:** Select this option to save the selected report parameters.

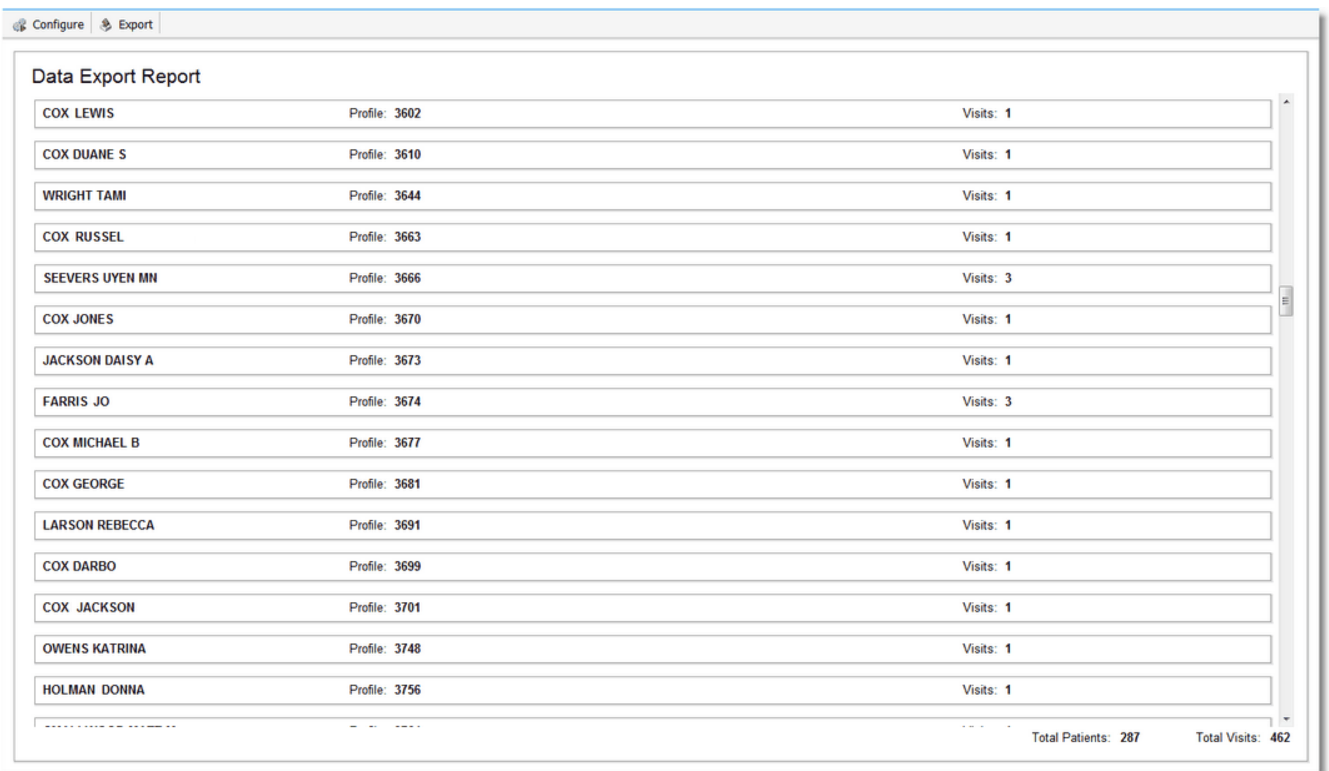
- **Clear:** Select this option to clear selected parameters on the screen.

Run Report

Once all the report parameters have been selected, the **Run Report** option may be selected on the action bar.

The Data Export Report screen will then display a line for each patient that met the parameters. Each line will display the patient's name, profile number, and the number of visits within the selected discharge date range. The total number of patients and the total number of visits within the time frame will also display at the bottom of the screen.

Select **Report Dashboard** > **Data Export** > **Run** > **Run Report**



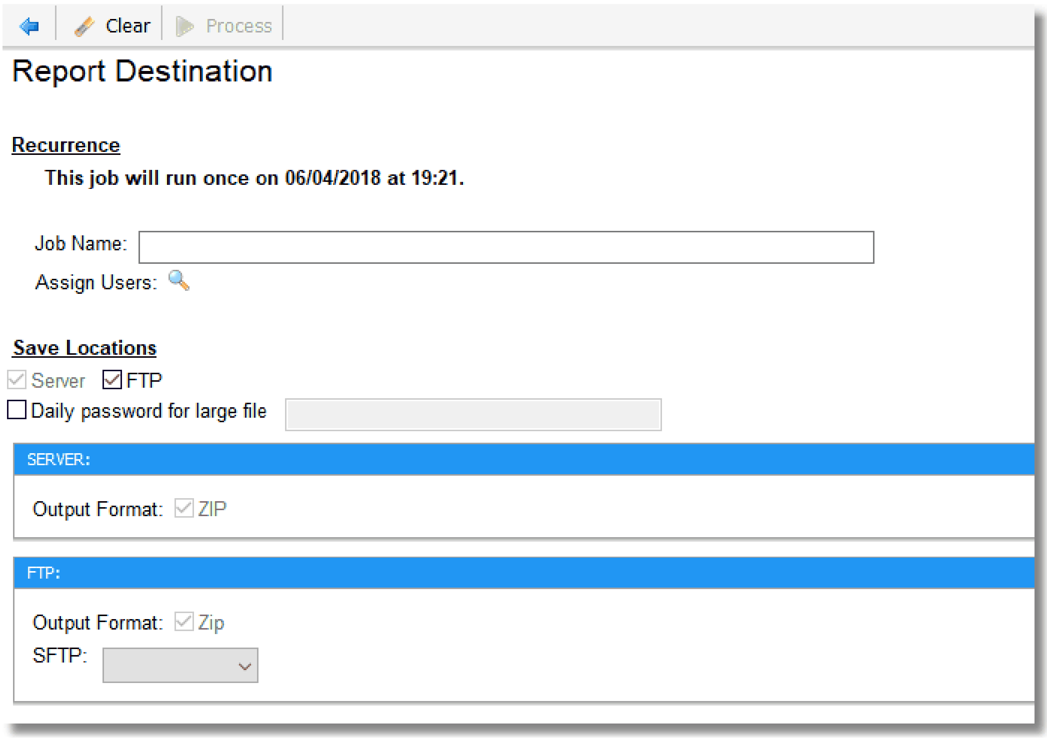
Data Export Report

Select the **Configure** option on the action bar to return to the report parameters screen.

Select the **Export** option on the action bar to go to the Report Destination screen. This screen will allow the report to be run on demand and will determine where the report will be exported to.

NOTE: *To be able to run this report on demand, users will need access to the Report Scheduler application in Identity Management.*

Select **Report Dashboard** > **Data Export** > **Run** > **Run Report** > **Export**



Report Destination

Listed below is an explanation of each section.

- **Recurrence:** Displays the parameters selected on the Report Recurrence screen. The Report Recurrence screen is accessed when selecting Schedule from the Data Export parameters screen. If Run Report was selected from the Data Export parameters screen, then the Recurrence will not display.
- **Job Name:** Enter a Job Name for the scheduled report. A Job Name must be entered in order to process the report.
- **Assign Users**: Users may be assigned to the scheduled report by selecting the Assign Users magnifying glass. For more information on assigning users, please refer to the Assign Users 6 section of this document.
- **Save Locations:** Select one of the following location options to save the report to:
  - **Server:** This option will be selected by default and allows the report to be saved to the facility server so that it may be transferred to other locations. When selected, the Server Output Format will need to be selected.

- **FTP:** Select this option to save the report to an FTP location. When selected, the FTP Output Format and the FTP Server will need to be selected. The SFTP drop-down will only list active FTP servers created by the facility in the FTP Setup table in HIM Table Maintenance. To save a report to FTP, users will need the Report Scheduler Behavior Control, "Send reports using SFTP" set to allow in Identity Management.
- **Daily Password for large file**: Select this option and enter the Daily Password for reports that will generate a large file.
- **Output Format**: For each Save Location selected, any applicable output format for that location will display. Select the desired output format for each location selected. The Zip option will be selected by default for each Save Location.

NOTE: *The Save to PC option will be available after the report is generated. This option may be selected from the Available Reports or Scheduled Jobs screens. Please see the Report Dashboard documentation for more information.*

Listed below is an explanation of the options on the action bar.

- **Clear:** This option will clear all selections that have been made on the screen.

- **Process:** Select this option to save the report to the selected destination. This option will not become available until all required fields have been populated.

Once **Process** has been selected, a Status screen will display with a progress bar to let the user know how much the report has processed. The amount of information being generated on the report will determine how long it will take for the report to run. Once the report is generated, a Report Confirmation screen will display letting the user know the report was run successfully. To exit the confirmation screen, it will need to be closed from the navigation panel.

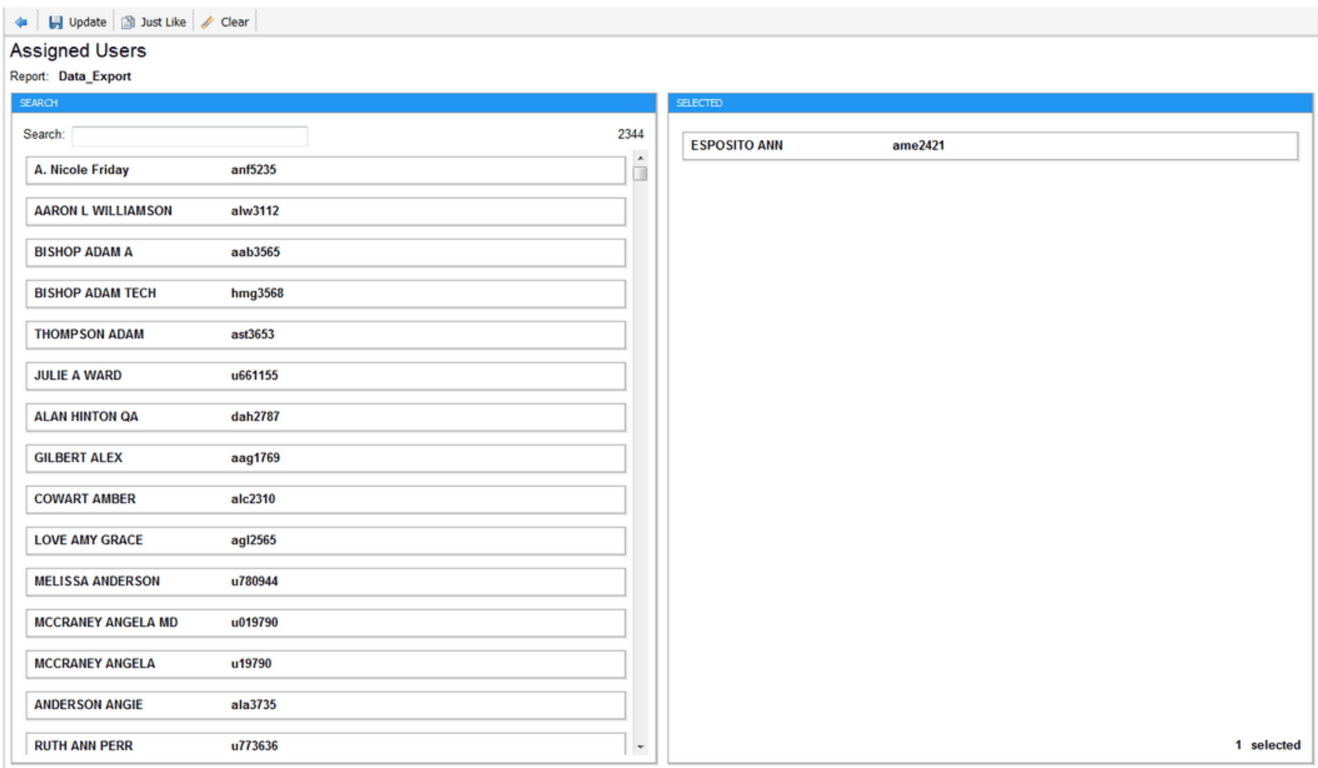
NOTE: *For more information on viewing reports run on demand please refer to the Available Reports chapter in the Report Dashboard user guide.*

Assign Users

The Assign Users option will allow users to be assigned to a scheduled job for the Data Export report. This will allow those users to make any changes to the scheduled job in addition to the user that created the job. This option will also allow users from an existing scheduled report to be easily copied to a new scheduled report.

Once on the Assigned Users screen, existing users will display on the left-side of the screen to be selected. To assign a user to the scheduled report, double-click the users name to add them to the Selected column on the right-side of the screen. To remove a user from the Selected column, double-click on the name. To remove all users from the Selected column, select **Clear** on the action bar. Select **Update** on the action bar to save changes.

Select **Report Dashboard** > **Data Export** > **Run** > **Schedule** > **Next** > **<u>Assign Users Magnifying Glass</u>**



Assigned Users

Just Like

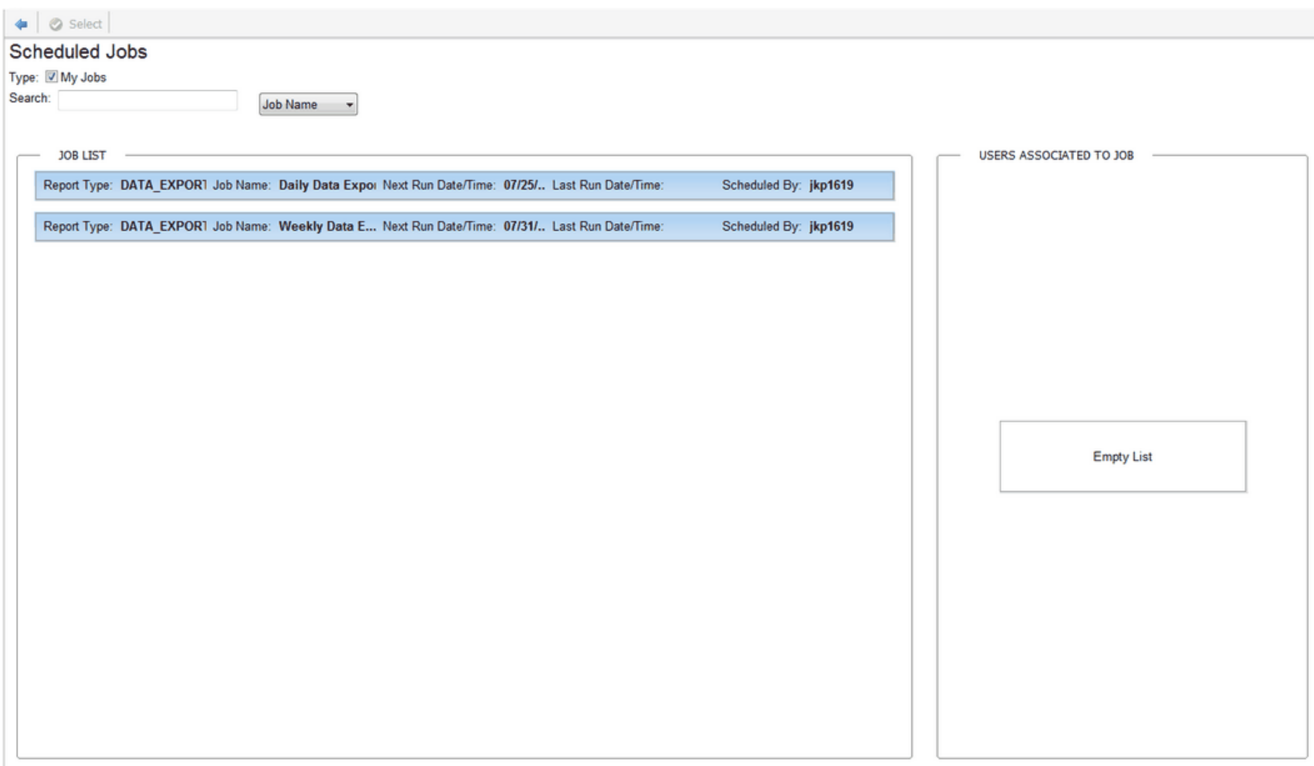
Users may be copied from an existing scheduled report by selecting **Just Like** on the action bar.

The screen will default to a Job List of existing scheduled reports created by the signed in user. To view a Job List of scheduled reports created by other users, uncheck the **My Jobs** check-box at the top of the screen.

A Search option is available to search the Job List by Job Name, Report Type or Users. To view a listing of users associated with a scheduled report, select one of the Jobs from the Job List. The users will then display in the Users Associated to Job column.

To continue with the Just Like function, select the scheduled job from the Job List and then select **Select** on the action bar.

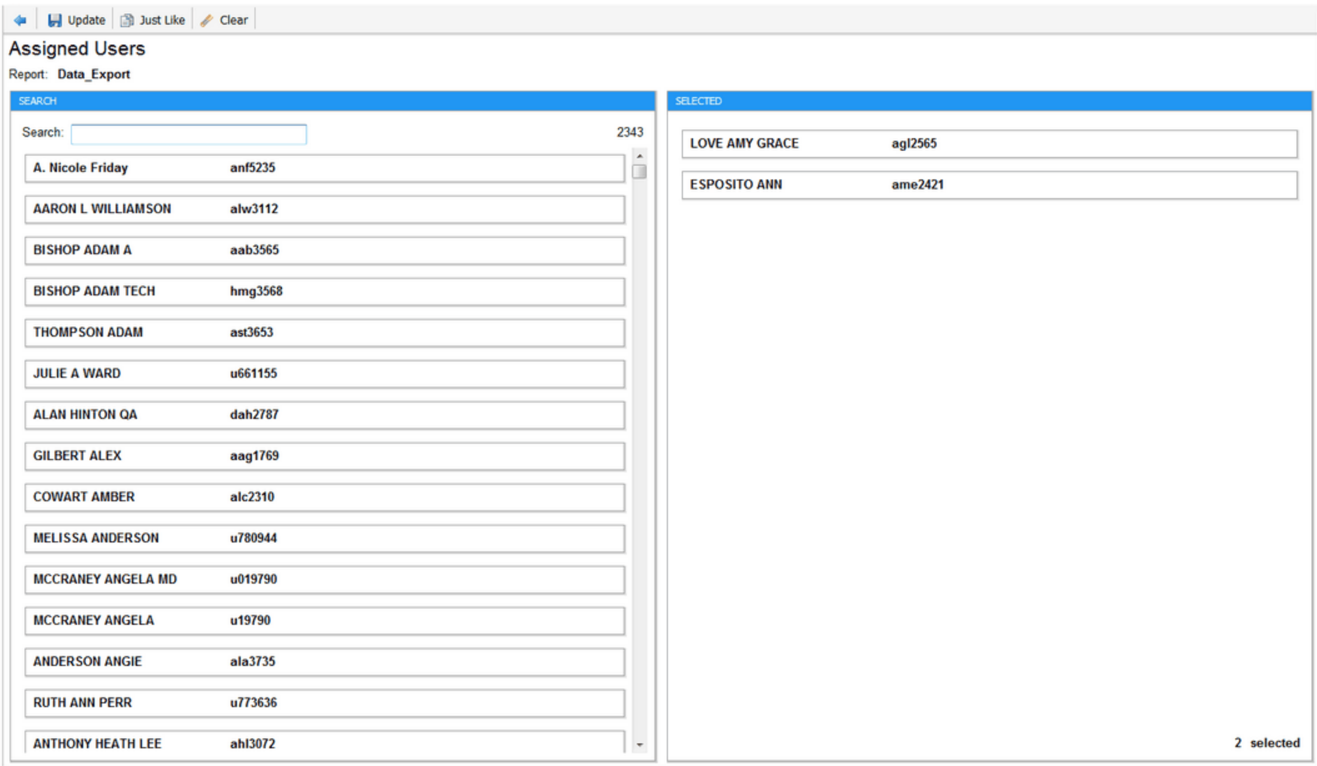
Select **Report Dashboard** > **Data Export** > **Run** > **Schedule** > **Next** > **Assign Users Magnifying Glass** > **Just Like**



Just Like - Scheduled Jobs

Thrive will then return to the Assigned Users screen. Select **Update** to save.

Select **Report Dashboard** > **Data Export** > **Run** > **Schedule** > **Next** > **Assign Users Magnifying Glass** > **Just Like** > **Select Job** > **Select**



Just Like - Assigned Users

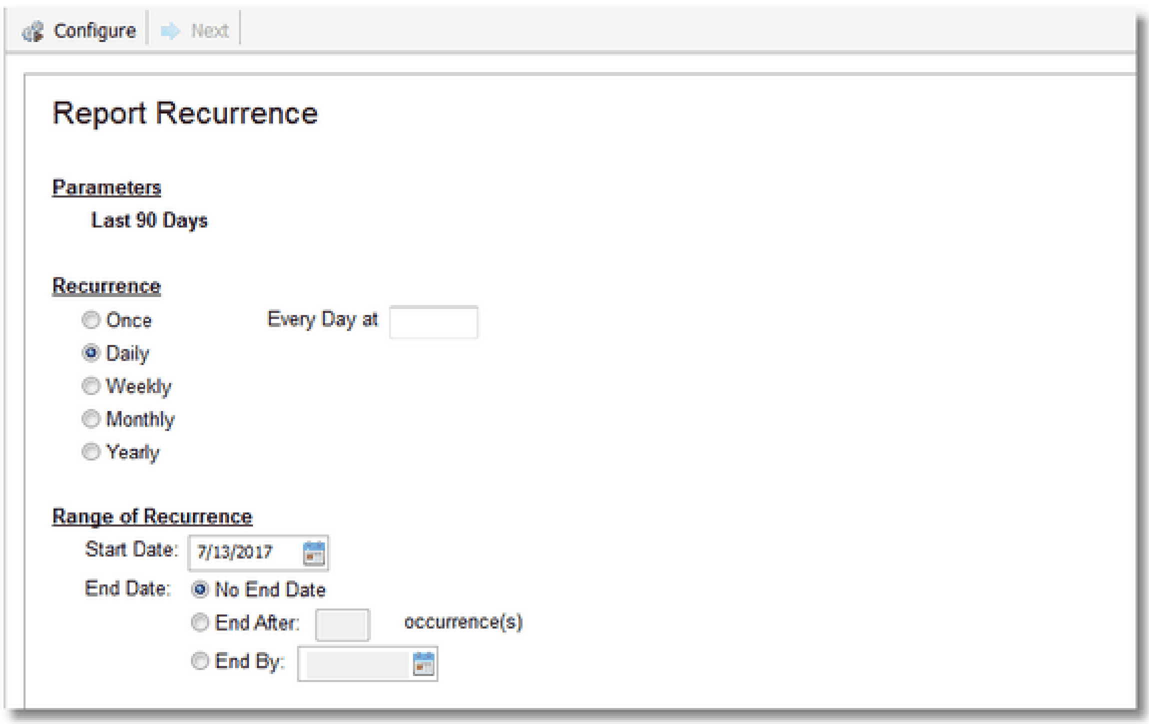
Schedule

Another option once all the report parameters have been selected is to schedule when the report will run. To do this, select **Schedule** on the action bar.

This option will only be available if the user has been given access to the Report Scheduler application in Identity Management.

NOTE: *Users will also need the Report Scheduler Behavior Control, "Schedule Reports" set to allow in Identity Management in order to create a schedule for the report.*

Select **Report Dashboard** > **Data Export** > **Run** > **Schedule**



Report Recurrence

Below is an explanation of each section and the options available within each section.

- **Parameters:** Displays the parameters selected on the previous page.

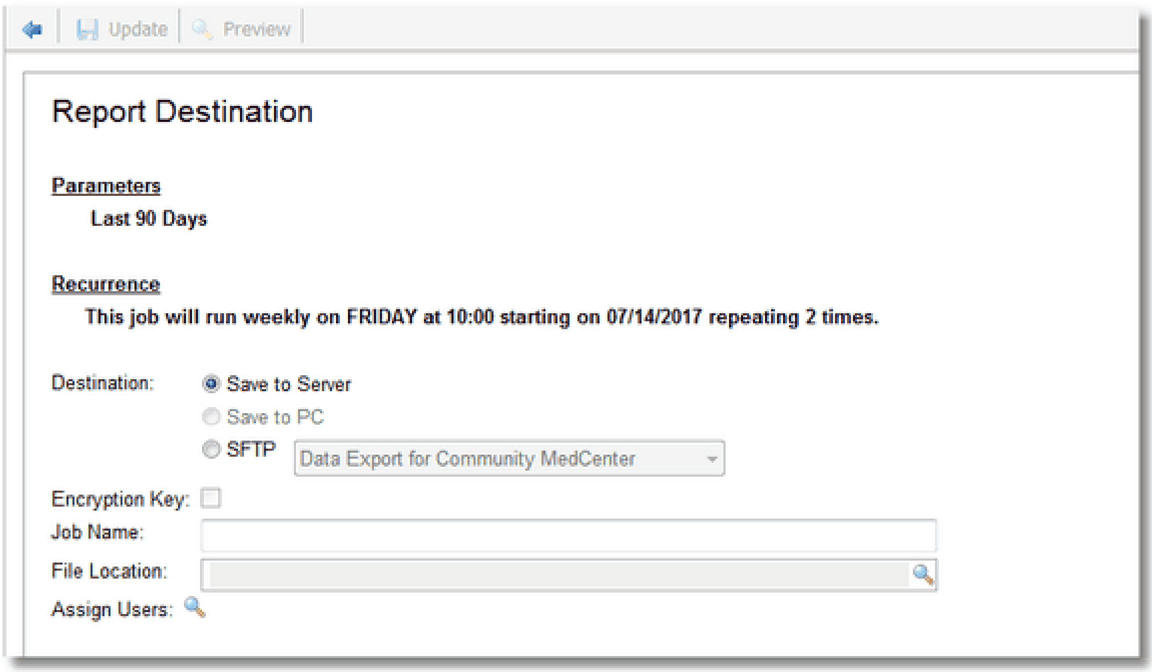
- **Recurrence:** Select one of the following options based on how often the report will need run.
  - **Once:** Select this option if the report will only need to be run one time. If selected, two additional fields will display next to this field to enter a date and time of when the report will need to run.
  - **Daily:** Select this option if the report will need to be run daily. If selected, an additional field will display next to this field to enter what time each day to run the report. The Range of Recurrence section will also need to be completed to determine how long the report will run.

- **Weekly:** Select this option if the report will need to run weekly. If selected, additional fields will display next to this field to select which days during the week the report will run and at what time. The Range of Recurrence section will also need to be completed to determine how long the report will run.
- **Monthly:** Select this option if the report will need to run monthly. If selected, additional fields will display next to this field to enter which day of the month to run the report and at what time. The Range of Recurrence section will also need to be completed to determine how long the report will run.
- **Yearly:** Select this option if the report will need to run yearly. If selected, additional fields will display next to the field to enter which month and day to run the report and at what time. The Range of Recurrence section will also need to be completed to determine how long the report will run.

- **Range of Recurrence:** This section will determine how long the report will need to run for. The following fields will need to be addressed if Daily, Weekly, Monthly or Yearly was selected in the Recurrence section.
  - **Start Date:** Select the date to begin running the report.
  - **End Date:** Select one of the following options for when the report will need to stop running.
    - **No End Date:** Select this option if the report will always need to run.
    - **End After:** Select this option to enter in how many times (occurrences) the report will need to run.
    - **End By:** Select this option to select a date as to when the report will need to stop running.

Once all of the sections have been addressed, select **Next** on the action bar to go to the Report Destination screen. Select **Configure** on the action bar if needing to return to the Data Export screen.

Select **Report Dashboard** > **Data Export** > **Run** > **Schedule** > **Next**



Report Destination

The Report Destination screen will need to be addressed to determine where the report will be saved when it runs at its scheduled day and time. Only the Save to Server and SFTP destinations will be available for selection. For more information on the options on this screen, please refer to the Run Report 3 section of this document.

Users may be assigned to the scheduled report by selecting the Assign Users magnifying glass. For more information on assigning users, please refer to the Assign Users 6 section of this document.

Once all the required information has been populated, select **Update** on the action bar to complete scheduling the report. The Report Confirmation screen will then display letting the user know the report has been scheduled successfully. To exit the confirmation screen, it will need to be closed from the navigation panel.

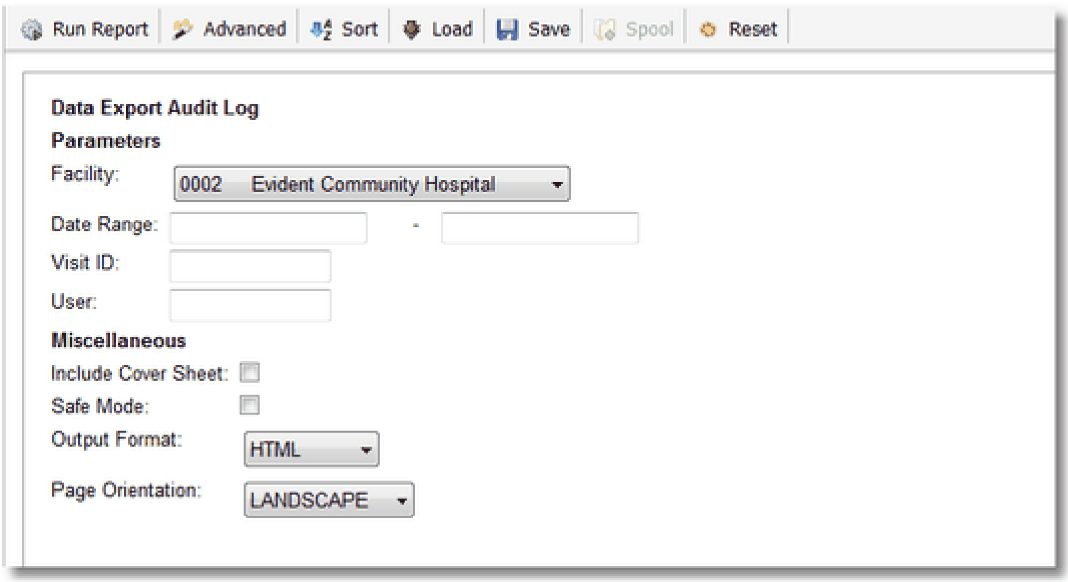
NOTE: *For more information on scheduling reports and viewing scheduled reports, please refer to the Scheduled Jobs chapter in the Report Dashboard user guide.*

Data Export Audit Log

Usage

The Data Export Audit Log will capture each time a Data Export file is accessed, viewed or transmitted/ copied. To begin using the Data Export Audit Log, it will need to be added to the Report Dashboard.

Select **Report Dashboard** > **Data Export Audit Log** > **<u>Run</u>**



Data Export Audit Log

- **Facility:** Select the desired Facility. (Only Facilities selected for access under that Login will be available for selection.)
- **Date Range:** Enter the date range to be audited.
- **Visit ID:** Enter the patient visit number to be audited. Leave this field blank to run for all visits.
- **User:** Enter the user ID of the employee to be audited. Leave this field blank to run for all users.
- **Include Cover Sheet:** Select this option to include a Cover Sheet with the report.
- **Safe Mode:** Select this option if the report would not build due to bad data being in a field. If the report has bad data, a message will appear stating to run report using the Safe Mode. If selected, Safe Mode will replace all of the bad characters with a **?**. This will allow the intended report to generate. The bad data may then be seen and can be corrected from the account level.

- **Output Format:** Use the drop-down menu to select one of the following report Format options:
  - **HTML**
  - **PDF**
  - **XML**
  - **CSV**
  - **MAPLIST**
  - **TXT**

- **Page Orientation:** Use the drop-down menu to select one of the following page orientations:
  - **Landscape**
  - **Portrait**

Select **Run Report** to display the report in the selected output format.

Data Export Audit Log

07/18/2017 Evident Community Hospital 25
15:00 Data Export Audit Log data_export_audit_log.template
Document was generated by the Thrive EHR Software
07/01/2017 - 07/18/2017

Date/Time	User	Patient Visit ID	Session ID	Action
07/11/2017 11:02:47	jkp1619	357205	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	356921	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	357443	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	357211	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	357210	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	222222	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	357176	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	356827	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	357268	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	356886	jkp1619_1499788967508	Copy
07/11/2017 11:02:47	jkp1619	356902	jkp1619_1499788967508	Copy

Below is an explanation of each column.

- **Date/Time:** The date and time the patient's visit was accessed.

- **User:** The user login that accessed the patient's visit.

- **Patient Visit ID:** The patient's visit number that was accessed.

- **Session ID:** The session ID of when the information was accessed.

- **Action:** The action that was taken on the patient's visit. This will show either Copy, View or Accessed.