



## Weill Cornell Medical College Physician Organization

Appendix / Sample Questions

[HTTPS://POWAREHSE.MED.CORNELL.EDU/COGNOS8](https://powarehse.med.cornell.edu/cognos8)

### **Physician Organization Information Services Reporting Group**

Weill Cornell Physician Organization  
Weill Medical College of Cornell University  
575 Lexington Avenue, 3rd floor  
New York, NY 10022



### **Addendum to Cognos Manual - Sample exercises**

This section is designed to supplement the Cognos Analysis Studio and Cognos Connection manual. These sample case studies are intended to reinforce concepts taught during Cognos training and in the Cognos manuals.

The WCMC cubes used in the following case studies are:

1. TES
2. Schedule
3. Income analysis
4. Open and closed encounters


### **Exercise 1 - TES Edit Current Cube**

You are running a report in your department and you would like to reward staff with the lowest TES Edit Counts in the last three months (it is currently June 2009). Of the remaining edit counts found, you would like them to be cleaned up, to disseminate this information; a drill-through report will be needed and saved in an Excel format.

#### Solution:

1. To view additional data in the crosstab without having to click 'More', go to the settings menu and select 'Set number of visible items'. Enter '9999', **click** 'OK'.
2. From the Insertable Objects pane, locate your group from the 'Group/Division/Billing Area/Provider dimension' and **drag** your group to the **row drop zone**.
3. From the Insertable Objects pane, locate 'May 2009' from the 'Tn Creat Dt/2009/2009 Q4' dimension, **drag** the '2009 Q4' item to the **column drop zone**.
4. From the Insertable Objects pane, locate Edit Count measure in the measures dimension and **drag** the 'Edit Count' measure to the **measure drop zone**.

Rows:	Columns:				Context filter:
5 - DEPARTMENT ...	2009 Q 4				
Edit Count	2009/Apr	2009/May	2009/June	2009 Q 4	
CENTER FOR WOMENS HEALTH		12	8	20	
OBSTETRICS/GYNECOLOGY	19	16		35	
DIVISION OF CARDIOLOGY		19		19	
INTERNATIONAL MEDICINE	41	28	4	73	
CARDIOVASCULAR CENTER		52	3	55	
GENERAL INTERNAL MEDICINE	1	81	3	85	
GERIATRICS	138	644	183	965	
( Blank )	1,138	1,365	136	2,639	
<b>5 - DEPARTMENT OF MEDICINE</b>	<b>1,337</b>	<b>2,217</b>	<b>337</b>	<b>3,891</b>	

- Organize the 2009 Q4 totals in ascending order, by **right clicking** the '2009 Q4' total column and select 'Sort' and then 'Ascending'. Once sorted, you should see the divisions change with the least amount of TES Edit Counts listed first.
- Drill down on the division by **clicking** on the division name. When **clicking** the division, a downward carrot  will appear. This will display data that is one level below.
- To see the remaining edits at the invoice level and have them cleaned up in TES, a drill-through report can be viewed by **right clicking** the cell value desired (in this example, the intersection of '2009 Q4' and 'X Cornell Cardiology Consultants' <number 19>), then **select** 'Go To' – 'Related Links'.

Rows:	Columns:					Context filter:
DIVISION OF CAR...	2009					
Edit Count	2009 Q 1	2009 Q 2	2009 Q 3	2009 Q 4	2009	
X CORNELL CARDIOLOGY CONSULTANTS			2	4	6	
DIVISION OF CARDIOLOGY			2	4	6	

Drill Down

Drill Up

Go To

Related Links...

Search...

**Available links:**

Name	Target
 TES Edit Current C8 Drill Through ▾	TES_Current_RS
 TES Edit Summary C8 Drill Through ▾	TES_Edit_Summary

[View](#)

**Model-based Drill-through access:**

Package search path: /content/folder[@name='Cube Packages']/package[@name='TES\_Edit\_Current\_C8']


Passed source values:

Display value	Use value
X CORNELL CARDIOLOGY CONSULTANTS 2009 Q 4	[TES_Edit_Current_C8].[Group/Division/Billing Area/Provider].[Group/Division/Billing Area/Provider].[Billing Area]->:[PC].[@MEMBER].[X CORNELL CARDIOLOGY CONSULTANTS] [TES_Edit_Current_C8].[Tn Creat Dt].[Tn Creat Dt].[Quarter]->:[PC].[@MEMBER].[20090401-20090630]

Cancel

GRP + DESC	Division	Billing Area	Location
5 - DEPARTMENT OF MEDICINE	DIVISION OF CARDIOLOGY	X CORNELL CARDIOLOGY CONSULTANTS	DOCTOR'S OFFICE
5 - DEPARTMENT OF MEDICINE	DIVISION OF CARDIOLOGY	X CORNELL CARDIOLOGY CONSULTANTS	DOCTOR'S OFFICE

❖ **Tip:** The results from the drill-through report describe edit items that are in need of fixing.

- To export the file to Excel, click the  icon in the upper right hand corner and navigate to the 'View in Excel Options', then 'View in Excel 200(x) Format'.

## Exercise 2 - Schedule Cube

You are trying to determine the heaviest patient volume in your department within the organization. Through historical data over the past year 2008 (it is currently June 2009); you would like to find out which day(s) are the busiest days for the top five locations for your department.

- a) Once you find out the top five most active locations, you have a colleague that is interested in knowing which providers have the most appointments in the most active locations. Using this report, add a new filter to find out your department's metrics. Also, add a graph to the cross tab report.
- b) Your colleague is fascinated with the results found and wants to see the top 5 most active departments, most active locations and most active providers.
- c) As you are analyzing your department and the data, you want to find the average appointment count for the top 5 locations of your department.

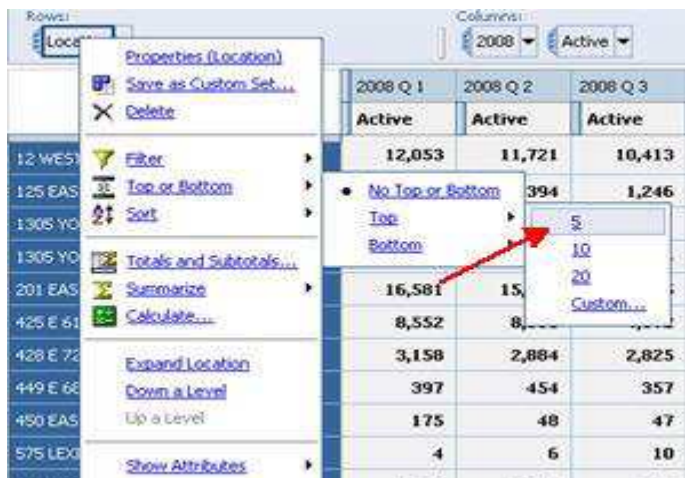
### Solution:

1. To view all dimensions that are in the row drop zone, go to the settings menu and select 'Set number of visible items'. Enter '9999' to view all items.
2. From the Insertable Objects pane, locate the 'Location' dimension and drag the 'Location' dimension to the **row drop zone**.
3. From the Insertable Objects pane, locate 2008 from the 'Appt Date CY' dimension and drag the '2008' item to the **column drop zone**. (To have the year without the quarter details, please make sure that the insert *without* details is checked, which is located in Settings/Insertion Options/ Insert without details )
4. From the Insertable Objects pane, locate the 'Provider Status' dimension and drag the 'Active' item to the right of '2008' in the overview area or below the '2008' dimension in the crosstab in the **column drop zone**.
5. From the Insertable Objects pane, locate the 'Appt Day of Week' dimension and drag the 'Appt Day of Week' dimension to the right of 'Active' in the overview area or below the '2008' dimension in the crosstab in the **column drop zone**. If the order is *not* in the order from Monday to Friday, and the order of the days is desired, Monday through Friday will need to be selected individually in the order desired (Ctrl + click each day of the week).
6. From the Insertable Objects pane, locate 'Appointment Count' measure in the measures dimension and drag the 'Appointment Count' measure to the **measure drop zone**.

7. To find the top 5 locations that have the most appointment counts:


- i. Right click on 'Location' in the Overview Area
- ii. Choose 'Top or Bottom'
- iii. Select 'Top', and then select '5'.

Top 5 locations:



Appointment Count	2008					
	Active					
	Monday	Tuesday	Wednesday	Thursday	Friday	Total
ENT WEILL GREENBERG CENTER	17,170	19,056	20,200	14,806	12,917	84,149
HELMSLEY TOWER 5	13,654	16,838	14,801	15,753	12,111	73,157
IVF WEILL GREENBERG CENTER	13,017	14,624	12,008	12,219	13,068	64,936
201 EAST 80 STREET	11,959	13,983	12,890	12,957	11,759	63,548
1130	8,479	10,270	12,879	10,524	7,804	49,956
<b>Subtotal (included)</b>	<b>64,279</b>	<b>74,771</b>	<b>72,778</b>	<b>66,259</b>	<b>57,659</b>	<b>335,746</b>
<b>Location</b>	<b>298,988</b>	<b>314,474</b>	<b>306,817</b>	<b>290,316</b>	<b>242,718</b>	<b>1,453,313</b>

8. To find the tops and bottoms for the departments, replace the location dimension with the 'Main Dept/Sched Dept/Prov' dimension and repeat step 7. For the tops and bottoms for providers, replace the location dimension with the 'Scheduling Provider' dimension and repeat step 7.

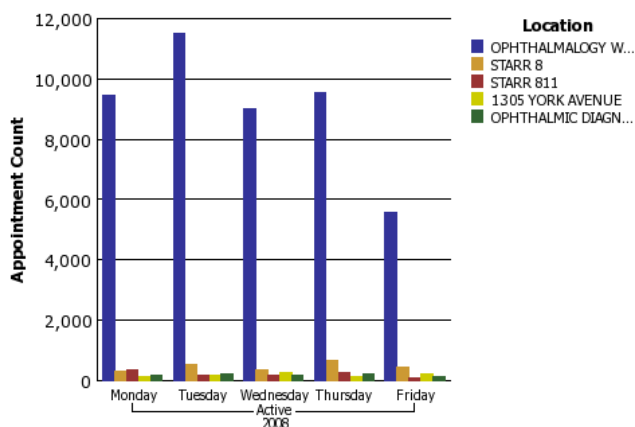
9. To graph the crosstab report, click the  icon and choose 'Crosstab and Chart' select. The default chart will be a standard column chart.

10. To filter, use your department. In this example, Ophthalmology was used.

- i. Locate the Main Dept/Sched Dept/Prov dimension
  - ii. Expand the Main Dept/Sched Dept/Prov dimension and drag Ophthalmology to the context filter.
- ❖ Note: Notice how the location names have changed and the sort in descending order has automatically been done.

Rows: Location Columns: 2008 Active Appt Day of Wee... Context filter: OPHTHALMOLOGY

Filters are applied. See the Properties pane for more details.



Total,Active,Total

Appointment Count	2008						Total			
	Active						Active			
	Monday	Tuesday	Wednesday	Thursday	Friday	Total	Monday	Tuesday	Wednesday	Thursday
OPHTHALMOLOGY WGC	9,462	11,490	8,998	9,531	5,568	45,049	9,462	11,490	8,998	9,531
STARR 8	285	501	360	635	425	2,206	285	501	360	635
STARR 811	321	180	158	270	70	999	321	180	158	270
1305 YORK AVENUE	106	167	249	135	183	840	106	167	249	135
OPHTHALMIC DIAGNOSTIC CTR	156	198	165	189	93	801	156	198	165	189
<b>Subtotal (included)</b>	<b>10,330</b>	<b>12,536</b>	<b>9,930</b>	<b>10,760</b>	<b>6,339</b>	<b>49,895</b>	<b>10,330</b>	<b>12,536</b>	<b>9,930</b>	<b>10,760</b>
<b>Location</b>	<b>10,439</b>	<b>12,760</b>	<b>10,276</b>	<b>10,946</b>	<b>6,392</b>	<b>50,813</b>	<b>10,439</b>	<b>12,760</b>	<b>10,276</b>	<b>10,946</b>

11. To find the average of the appointment counts by location:

- i. Right click on the header of any column (Monday, Tuesday, Wednesday, Thursday, Friday or Total) and choose calculation, then custom.
- ii. In Operation type, choose Analytic on the drop down box and the days of the week automatically populate.
- iii. In Operation, choose Average and Ctrl + click on each day of the week in the Available items area.
- iv. The Expressions box on the right hand side will contain an expression after the items have been selected. Click OK to confirm.

Calculate - Appt Day of Week (list)

Create a calculation by using the available operations and items. You can use created calculations to filter and sort.

**Operation type:**  
 Analytic

**Operation:**  
 Average

**Available items:**  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday

Number:

**Expression:**  
 Average (Monday, Tuesday, Wednesday, Thursday, Friday)

[Add this calculation to the Available items list to create advanced calculations](#)

**Name:**  
 Use the default name

OK Cancel

Appointment Count	2008							
	Active							
	Monday	Tuesday	Wednesday	Thursday	Friday	Average (Monday, Tuesday, Wednesday, Thursday, Friday)	Total	
OPHTHALMOLOGY WGC	9,462	11,490	8,998	9,531	5,568	9,010	45,049	
STARR 8	285	501	360	635	425	441	2,206	
STARR 811	321	180	158	270	70	200	999	
1305 YORK AVENUE	106	167	249	135	183	168	840	
OPHTHALMIC DIAGNOSTIC CTR	156	198	165	189	93	160	801	
<b>Subtotal (included)</b>	<b>10,330</b>	<b>12,536</b>	<b>9,930</b>	<b>10,760</b>	<b>6,339</b>	<b>9,979</b>	<b>49,895</b>	
<b>Location</b>	<b>10,439</b>	<b>12,760</b>	<b>10,276</b>	<b>10,946</b>	<b>6,392</b>	<b>10,163</b>	<b>50,813</b>	



12. An *alternative* to creating the average via a custom calculation is highlighting each weekday (ctrl + click) and right clicking the days of the week and choose 'Average'.

Appointment Count		2008					Total				
Active		Monday	Tuesday	Wednesday	Thursday	Friday	Total	Monday	Tuesday	Wednesday	Thursday
OPHTHALMOLOGY WGC		8,687	10,229	8,116	7,944	5,081				8,116	7,944
STARR 8		285	501	360	634	40				360	634
OPHTHALMIC DIAGNOSTIC CTR.		156	197	164	189	9				164	189
STARR 811		63	108	100	87	3				100	87
K810		55	5	177	4	1				177	4
<b>Subtotal (included)</b>										<b>8,917</b>	<b>8,858</b>
<b>Location</b>										<b>9,080</b>	<b>8,986</b>

- Save as Custom Set...
- Delete
- Keep
- Exclude
- Calculate
- Go To
- Show Attributes
- Properties (Appt Day of Week (list))

13. Once the calculation has been created, a new column will appear with a default name of 'Average (Monday, Tuesday, Wednesday, Thursday, Friday)'.

Appointment Count		2008					Average (Monday, Tuesday, Wednesday, Thursday, Friday)		Total
Active		Monday	Tuesday	Wednesday	Thursday	Friday			
EILL GREENBERG CENTER		17,036	18,959	20,096	14,723	12,861		16,735	83
EY TOWER 5		13,654	16,838	14,801	15,753	12,111		14,631	73
EILL GREENBERG CENTER		13,017	14,634	12,008	12,219	13,068		12,987	54

14. To rename the calculated column to 'Average Weekday Counts', right click on the 'Average (Monday, Tuesday, Wednesday, Thursday, Friday)' column. Within the drop down menu that appears, select 'Rename'.

Average (Monday, Tuesday, Wednesday, Thursday, Friday)	
	16,735
	14,631
	12,987
	12,710
	9,991
	<b>67,054</b>

- Delete
- Rename...
- Edit this Calculation...
- Sort
- Calculate
- Properties (Appt Day of Week (list))

15. A Rename box will appear at the bottom of the screen. Select the blank editable box and type 'Average Weekday Counts'.

16. Click OK.

17. The renamed column should now display 'Average Weekday Counts' as the below caption.


Appointment Count	2008						
	Active						
	Monday	Tuesday	Wednesday	Thursday	Friday	Average Weekday Counts	Total
OPHTHALMOLOGY WGC	8,687	10,229	8,116	7,944	5,080	8,011	40,056
STARR 8	285	501	360	634	404	437	2,184
OPHTHALMIC DIAGNOSTIC CTR	156	197	164	189	93	160	799
STARR 811	63	108	100	87	37	79	395
K810	55	5	177	4	10	50	251
<b>Subtotal (included)</b>	<b>9,246</b>	<b>11,040</b>	<b>8,917</b>	<b>8,858</b>	<b>5,624</b>	<b>8,737</b>	<b>43,685</b>
<b>Location</b>	<b>9,294</b>	<b>11,257</b>	<b>9,080</b>	<b>8,986</b>	<b>5,713</b>	<b>8,866</b>	<b>44,330</b>

### Exercise 3 - Income and Analysis Cube

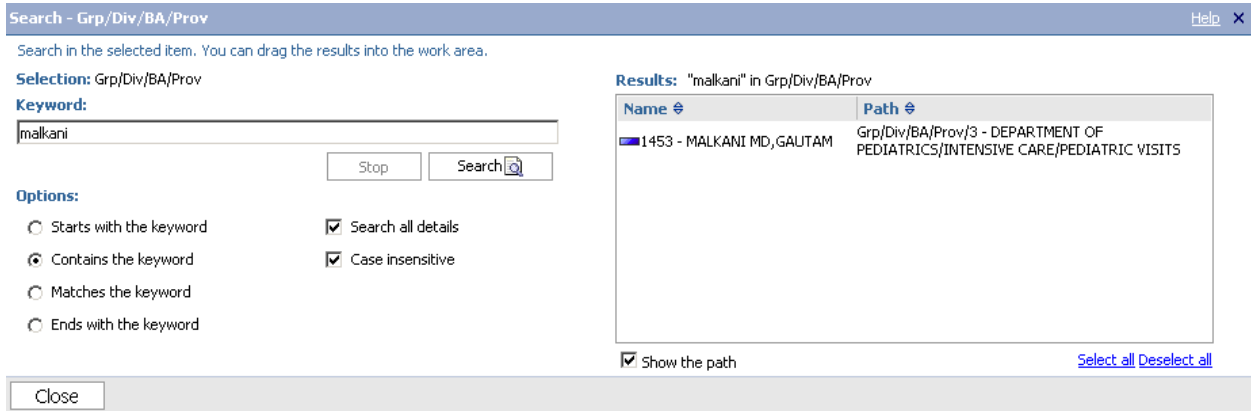
You are trying to compare your monthly GE CTS report against the Income Analysis cube to verify if your gross billings (charges), net receipts (payments), write offs, courtesies and allowances (adjustments) are correct for your department. It is currently the year 2007 (Post Period FY/CY – 2007).

- a) Upon verification, the doctors that have asked about their charges and wanted to be sure that their charges are being entered properly. You are unsure of where the provider entry is located, and would like to use the search feature to find out. (Malkani MD, Gautam – Grp/Div/BA/Prov/3-Department of Pediatrics/Intensive Care/Pediatric Visits)
- b) You find a discrepancy with your doctor's payments and want to verify the payments at the invoice level. You want to show the results to a colleague in Excel format.

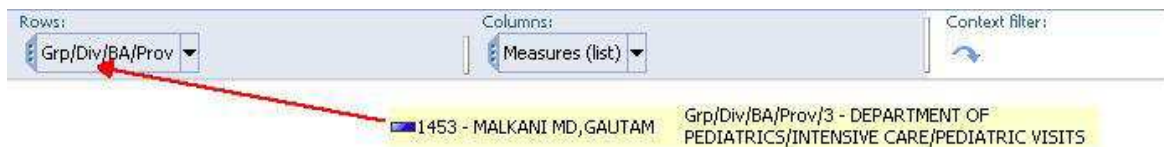
#### Solution:

1. To view all items that are in the row drop zone, go to the settings menu and select 'Set number of visible items'. Enter the maximum number, '9999' to view all items.
2. From the Insertable Objects pane, locate the 'Grp/Div/BA/Prov' dimension and drag the 'Grp/Div/BA/Prov' dimension to the **column drop zone**.
3. From the Insertable Objects pane, locate the 'Measures' dimension and drag the 'Charges', 'Payments', 'Courtesies', 'Adjustments', 'Write Offs' dimension to the **row drop zone**.
  - ❖ Note: To select each measure item you can control + click each item and drag the measures items to the row drop zones.
  - ❖ Note: When selecting each item, the order in which they are selected will be displayed in that order within the cross tab.
4. From the Insertable Objects pane, locate the 'Post Period FY/CY' dimension and drag the year '2007' item, to the **context filter drop zone**.
5. To make the report more visually appealing **click** on the 'Swap Rows and Columns' icon  to reposition the data.
6. Typically, we suppress rows under the **totals**; however in this case, we want to suppress zeros on each measure item to remove the blank or zeroed cells.
7. To find the entry where the doctors belong to:
  - a) **Right click** on the Grp/Div/BA/Prov dimension.

- b) **Click** search (Grp/Div/BA/Prov) and the search bar will appear. Verify that the Grp/Div/BA/Prov dimension appears on the blue search bar property to ensure the dimension search criteria.
- c) Type the name of your doctor in the keyword box. Ensure that the 'Contains the keyword', 'Search all details' and 'Case Insensitive' check boxes are selected. **Click** search. (In this example, Malkani MD, Gautam was used as the searched provider.)



- c) Once the names are found check the 'show the path' checkbox to verify the provider's group association. From the Results pane, you can drag the provider dimension and overwrite the Grp/Div/BA/Prov dimension in the Row drop zone in the overview area.



- d) Repeat step 5 to search for another provider. Once the other provider is found, rather than overwriting the prior provider to view the charges, the providers can be viewed at the same time (for instances of comparison). Drag the search results from the second provider to the bottom of first provider (you should see a thin black line below the first provider).

	CHARGE
1453 - MALKANI MD, GAUTAM	
1108 - USHAY MD, HENRY MICHAEL	226,

- From the cross section of Payments and Dr. Ushay, right click the cross sectioned cell [click](#) 'go to' related links.

	CHARGES	PAYMENTS	COURTESIES	ADJUSTMENTS	WRITE OFFS
1453 - MALKANI MD,GAUTAM	0.00	-10.00	0.00	-252.50	2,112.50
1108 - USHAY MD,HENRY MICHAEL	0.00	-1,043.58	0.00	3,250.89	23,643.77

- To confirm that the values chosen at the cross section of 'Payments' and 'Dr Ushay', select 'View passed source values' to confirm detail (recommended).
- When confirmed, click on the 'Income Analysis Billing DrillThrough' for the drill-through report.

Go to Help X

**Available links:**

Name	Target
<a href="#">Income_Analysis_Billing_DrillThrough</a>	Income_Analysis_Billing_R5

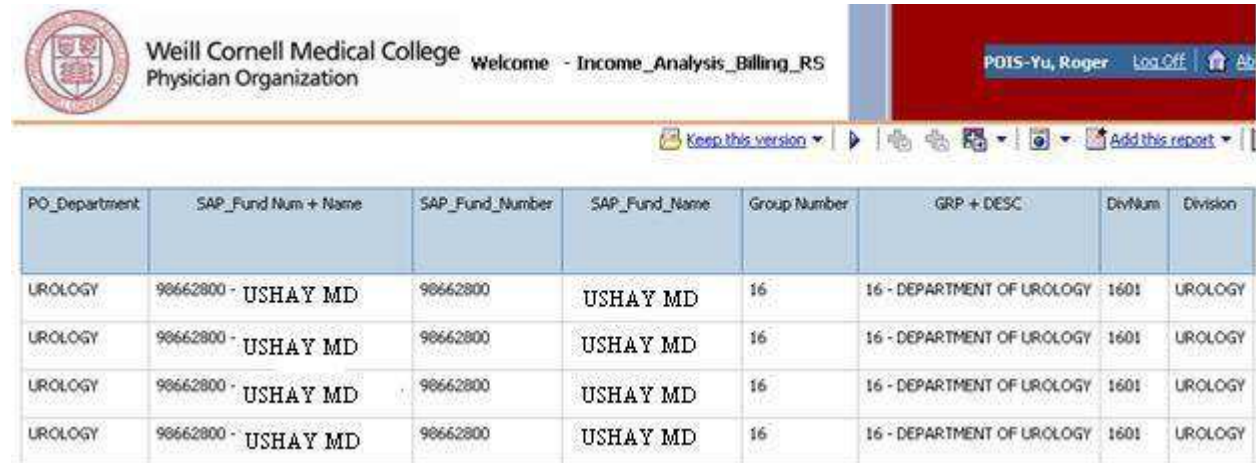
[View passed source values](#)

**Model-based Drill-through access:**  
 Package search path: /content/folder[@name='Cube Packages']/package[@name='Income\_Analysis\_Billing\_C8']  
 Passed source values:

Display value	Use value
1108 - USHAY MD,HENRY MICHAEL	[Income_Analysis_Billing_C8].[Grp/Div/BA/Prov].[Grp/Div/BA/Prov].[Prov Num + Name]->:[PC].[@MEMBER].[1108 - USHAY MD,HENRY MICHAEL]
CTS Payments Category	[Income_Analysis_Billing_C8].[CTS Payments Category].[CTS Payments Category].[CTS Payments Category]->:[PC].[@MEMBER].[CTS Payments Category]
2007	[Income_Analysis_Billing_C8].[Post Period FY / CY].[Post Period FY / CY].[Fiscal Year]->:[PC].[@MEMBER].[20060701-20070630]


Cancel

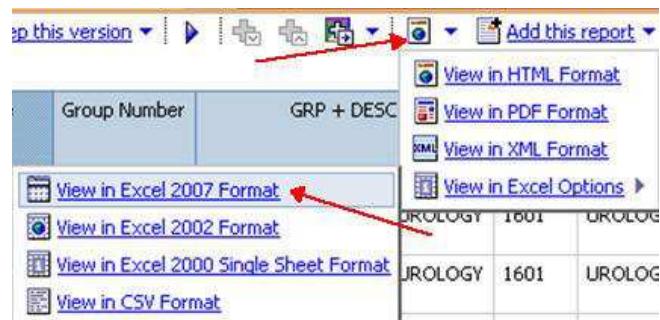
## Drill-Through Report:



The screenshot shows the Weill Cornell Medical College Physician Organization Information Systems interface. The header includes the Weill Cornell Medical College logo, the text "Weill Cornell Medical College Physician Organization", a "Welcome" message, and the report title "Income\_Analysis\_Billing\_RS". The user is identified as "POIS-Yu, Roger" with "Log Off" and "Home" links. A toolbar contains options like "Keep this version" and "Add this report". Below the toolbar is a table with the following data:

PO_Department	SAP_Fund Num + Name	SAP_Fund_Number	SAP_Fund_Name	Group Number	GRP + DESC	DivNum	Division
UROLOGY	98662800 - USHAY MD	98662800	USHAY MD	16	16 - DEPARTMENT OF UROLOGY	1601	UROLOGY
UROLOGY	98662800 - USHAY MD	98662800	USHAY MD	16	16 - DEPARTMENT OF UROLOGY	1601	UROLOGY
UROLOGY	98662800 - USHAY MD	98662800	USHAY MD	16	16 - DEPARTMENT OF UROLOGY	1601	UROLOGY
UROLOGY	98662800 - USHAY MD	98662800	USHAY MD	16	16 - DEPARTMENT OF UROLOGY	1601	UROLOGY

11. To export the drill-through report to the Department Administrator, click on the  icon (upper right hand side of the screen); click 'View in Excel Options', then click on 'View in Excel 2007 Format'.



## Exercise 4 - Open and Closed Encounter Cube

You are trying to reduce the amount of time it takes for open, arrived encounters by attendings for Encounter Types: Allied Health/Nurse Visit, Home Visit, Office Visit, Procedure, Research Encounter, Surgery Encounter, for your department. To see what the trend might be, you are interested in data from year 2007 and on for encounters that remain open.

- a) You notice that there are open encounters fall within the > 180 Days range in the year 2009. You would like to address this with the attendings (200 encounter counts or more) to see what can be done to improve the process.
- b) Once the criteria have been narrowed down to the provider level, you would like to show the findings to the respective Department Administrator in Excel format.

### Solution:

1. To view all items that are in the row drop zone, go to the settings menu and select 'Set number of visible items.' Enter 9999 to view all items.
2. From the Insertable Objects pane, locate the 'Main Dept/Epic Dept/Provider' dimension and drag the 'Main Dept/Epic Dept/Provider' dimension to the **row drop zone**.
3. From the Insertable Objects pane, locate the 'Measures' dimension and go down one level, highlight the 'Encounter Count' items (ctrl+click) and drag to the **measure drop zone**.
4. From the Insertable Objects pane, locate the 'Encounter\_Date' dimension and go down one level, highlight the '2007', '2008', '2009' items (ctrl+click) and drag to the **column drop zone**.
5. From the Insertable Objects pane, locate the 'Encounter\_Age\_Category' dimension and drag to the **column drop zone** below the dates or to the right of the 'Encounter\_Date' in the overview area.
6. Due to the large amount of additional items which we would like to analyze (provider types, encounter types, encounter status and appointment status), rather than nesting the different parameters in the column drop zone, we will choose to filter the different items via the context filter, which allows for a more streamlined report by not showing the different criteria on the report itself.
7. From the Insertable Objects pane, locate the 'Encounter\_Closed\_YN' dimension and go down one level, highlight the 'Encounter Open' item and drag to the **context filter drop zone**.

8. From the Insertable Objects pane, locate the 'Encounter Type' dimension and go down one level, highlight the 'Allied Health/Nurse Visit', 'Home Visit', 'Office Visit', 'Procedure', 'Research Encounter', 'Surgery Encounter' items (ctrl+click) and drag to the **context filter drop zone**.
9. From the Insertable Objects pane, locate the 'Appt\_Status' dimension and go down one level, highlight the 'Arrived' item and drag to the **context filter drop zone**.
10. From the Insertable Objects pane, locate the 'Provider Type' dimension and go down one level, highlight the 'Attending' item and drag to the **context filter drop zone**.

Encounter Count	2007					Encounter_Age_Category
	0-2 Days	3-7 Days	8-30 Days	31-180 Days	>180 Days	
ANESTHESIOLOGY					153	153

11. To focus only on the Encounter Age Category, '> 180 Days' column', **right click** on the '> 180 Days' column and select 'keep'
12. To focus only on the year '2009', **right click** on '2009' and select 'keep' again.
13. To filter the encounter counts of the '> 180 Days' column for 200 encounter counts or more. Right click on the 'Main Dept/Epic Dept/Provider' dimension in the overview area and go to filter, then custom.



14. **Click** add filter and on each drop down box, choose 'Encounter Count', 'greater than or equal', 200, and '2009.> 180 Days'. **Click** ok.



Filter - Main Dept/Epic Dept/Provider Help X

Create a filter to limit the number of items in a selected set. Combine filters to create custom conditions (AND and OR). [Combine filter lines](#)

Type	Item	Operator	Value	For column
	Encounter Count	≥ (greater than or equal)	200	2009. >180 Days

Options: [Add a filter line](#) [Delete](#) [Delete all](#)

All criteria must be met (AND)     At least one criteria must be met (OR)

OK    Cancel

15. The remaining departments should have encounter counts above 200.

16. To find additional detail on each department, drill down on each department to the provider level to identify providers that must close their encounters.

- ❖ Tip: To help reduce the need to scroll please suppress your rows and columns on the totals.

17. Once at the provider level, **right click** on the Total 'Total' column and suppress rows.



18. The blank cells should now be removed and only the providers with values should remain.

19. To find the most granular detail of each provider, we will drill-through for more information. Go to the value you would like to find additional detail for (cross section of > 180 Days and provider).

20. For this example, the 160 encounter count value was chosen. Right click on '160', click 'Go To', and then click on 'Related Links'.

2009		Total	
>180 Days	Total	>180 Days	Total
1	1	1	1
1	1	1	1
2	2	2	2
6	6	6	6
6	6	6	6
160	160	160	160
		4	4
		1	1
1	1		

21. To confirm that the values chosen at the cross section of cross section of '> 180 Days' and 'provider', select 'View passed source values' to confirm detail (recommended).

22. When confirmed, click on the 'Epic Open Encounter Status Detail Report' drill through for the drill-through report.


Go to
Help ×

**Available links:**

	Name	Target
	<a href="#">Epic Open Close Encounter Status DrillThrough</a>	Epic_Open_Close_Encounter_Status_RS
	<a href="#">Epic Open Encounter Status Detail Report</a>	Epic Open Encounter Status Detail Report

→ [View passed source values](#) ⌵

Cancel

23. To export the drill-through report to the Department Administrator, click on the  icon (upper right hand side of the screen); click 'View in Excel Options', then click on 'View in Excel 2007 Format'.

- ❖ Note: Some recipients of the drill-through report may not have Excel 2007 installed, for backward compatibility, Excel 2000 or Excel 2002 can be used.



24. Save the exported Excel file to your local computer.

25. To share the report to the Department Administrator, email the Excel file as an attachment.

