Chronicle Filter Report

Filter Reports allow you to define exactly what data you would like to be generated by the system and how you would like to receive that data (on screen, exported, aggregated, etc.). Each report will result in a table of data, like an Excel spreadsheet. You can save the reports that you created and to access them on the left is a dropdown that allows you to select an existing report to load. To load an existing report, select it from the dropdown and select the Click to load selected report link.

Benefits of the Filter Report:

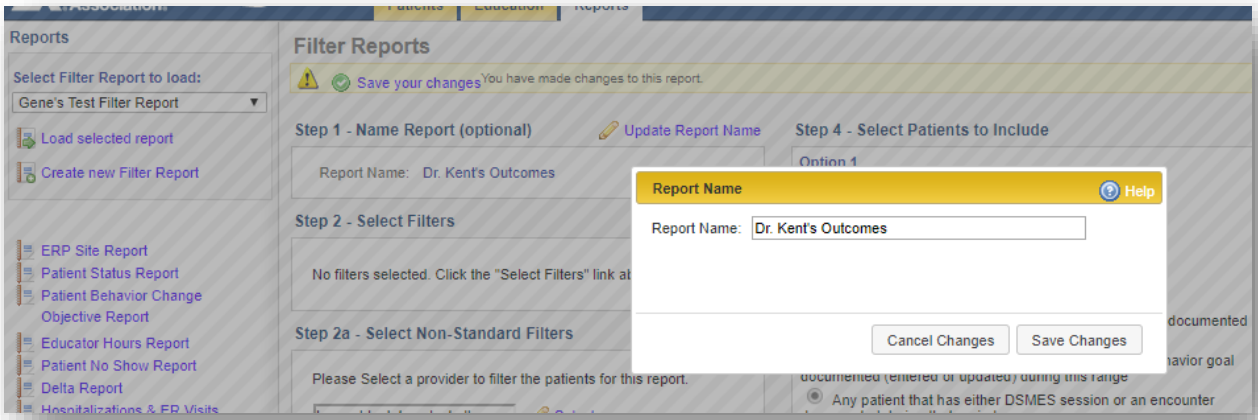
1. Ability to generate aggregate reports by numerous filters including provider and insurance type for the purpose of advertising program outcomes to insurers and providers.
2. Ability to generate individual participant reports which can include participant demographics as well as initial and most recent behavior objectives and lab data.
3. If a service would like a filter that is not within the system, a cohort can be created and will be added as a filter type.

Note: If your service is using Chronicle at minimal capacity (Only for tracking behavior and participant outcomes) there is an option to filter out only participants that had one or more of these encounter types during the date range selected.

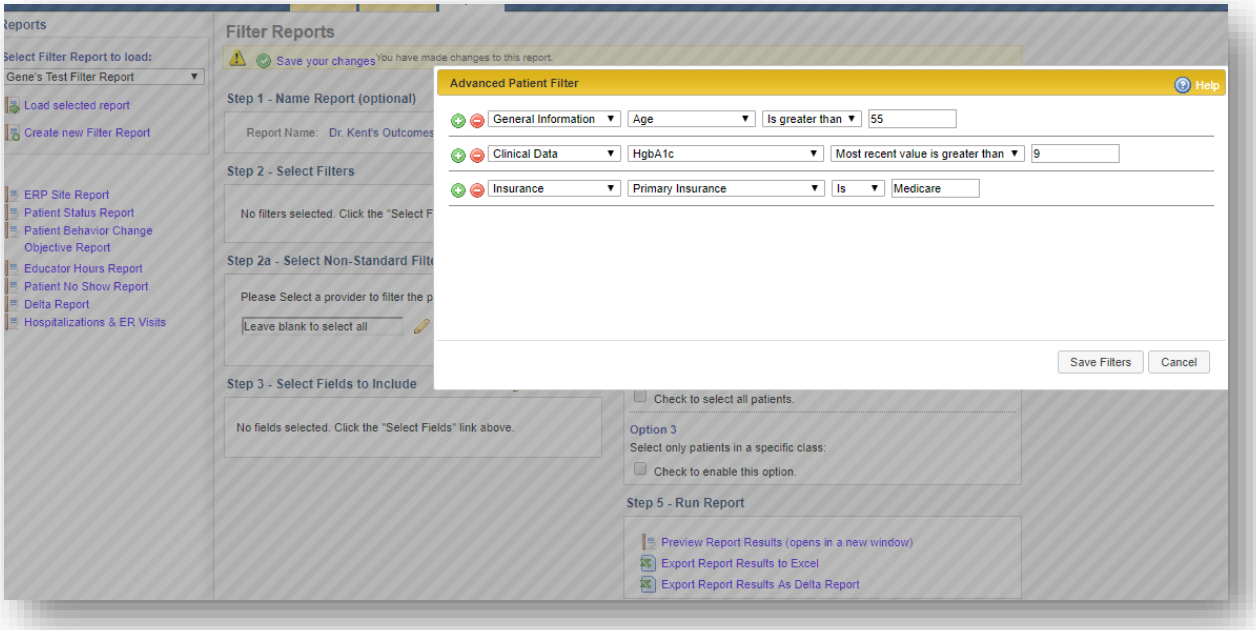
How to Create a New Filter Report:

Within the Report section of Chronicle; **click to create new Filter Report link**. Creating a new filter report has five steps. After making a change in any of the steps, you can save the report by clicking the link at the top of the page.

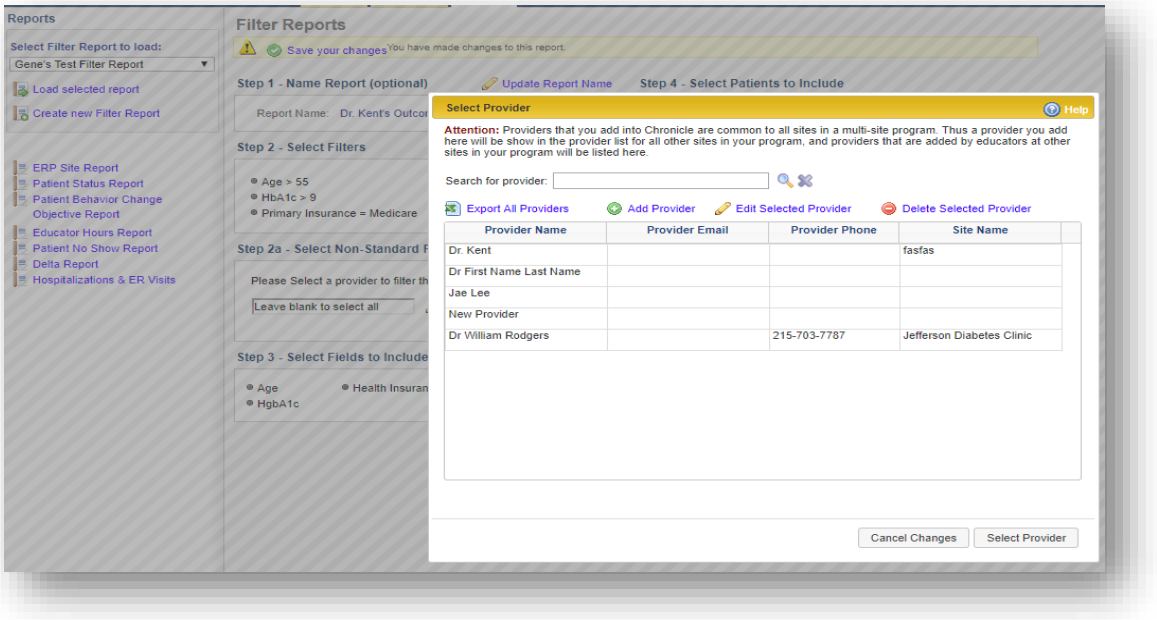
A. Step 1- Give your report a name by clicking the Update Report Name link. Make the name short but descriptive. It must be unique (two reports cannot have the same name). The report name will be used to identify the report in the selection drop down box.



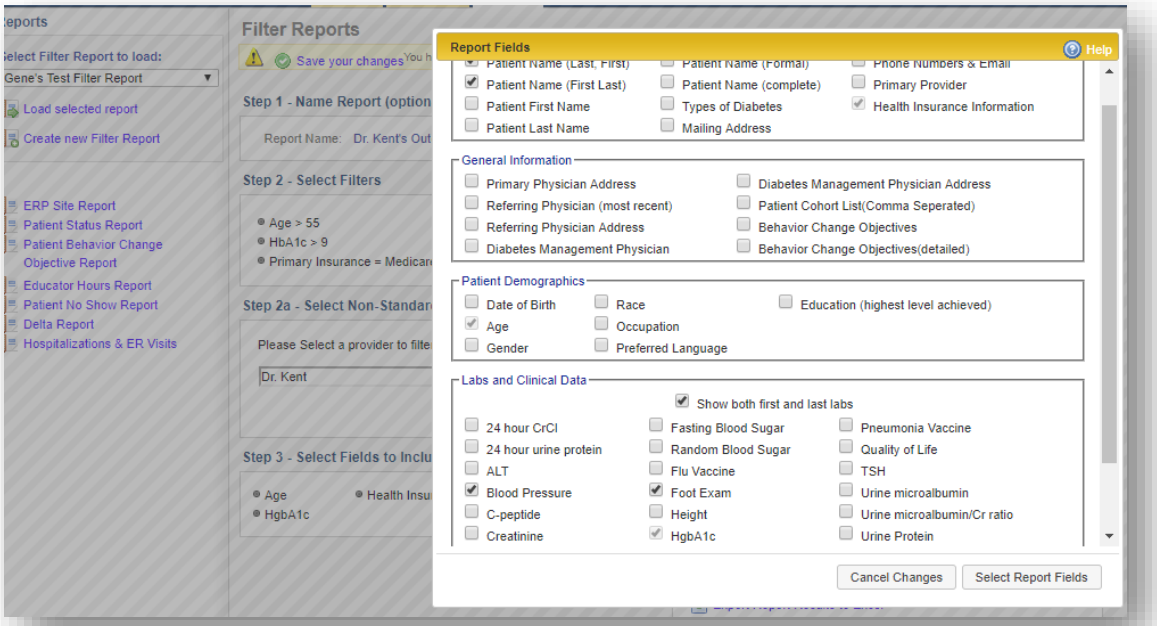
B. Step 2- Select and configure the filters that you'd like to have used in the report. **Example:** DSME & Follow-Up > Education Complete > Is > Not Complete. You can choose numerous filters at one time.



C. Step 2a – Non-Standard Filter. This filter will allow you to filter by provider.



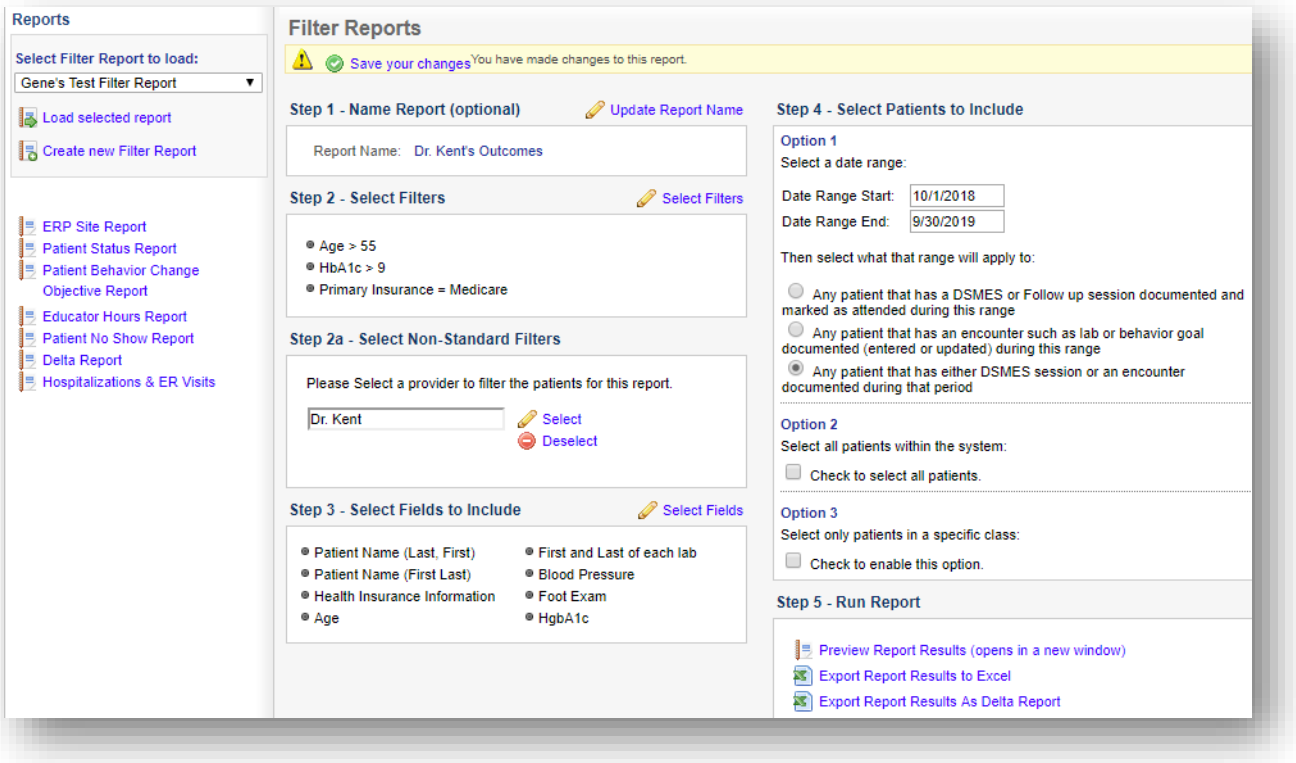
D. Step 3- Select what fields the data report should include. If you choose to download the excel version of this report each row is a patient record and each column is a field that you can select. You can select any number of demographics as well as first and last lab values.



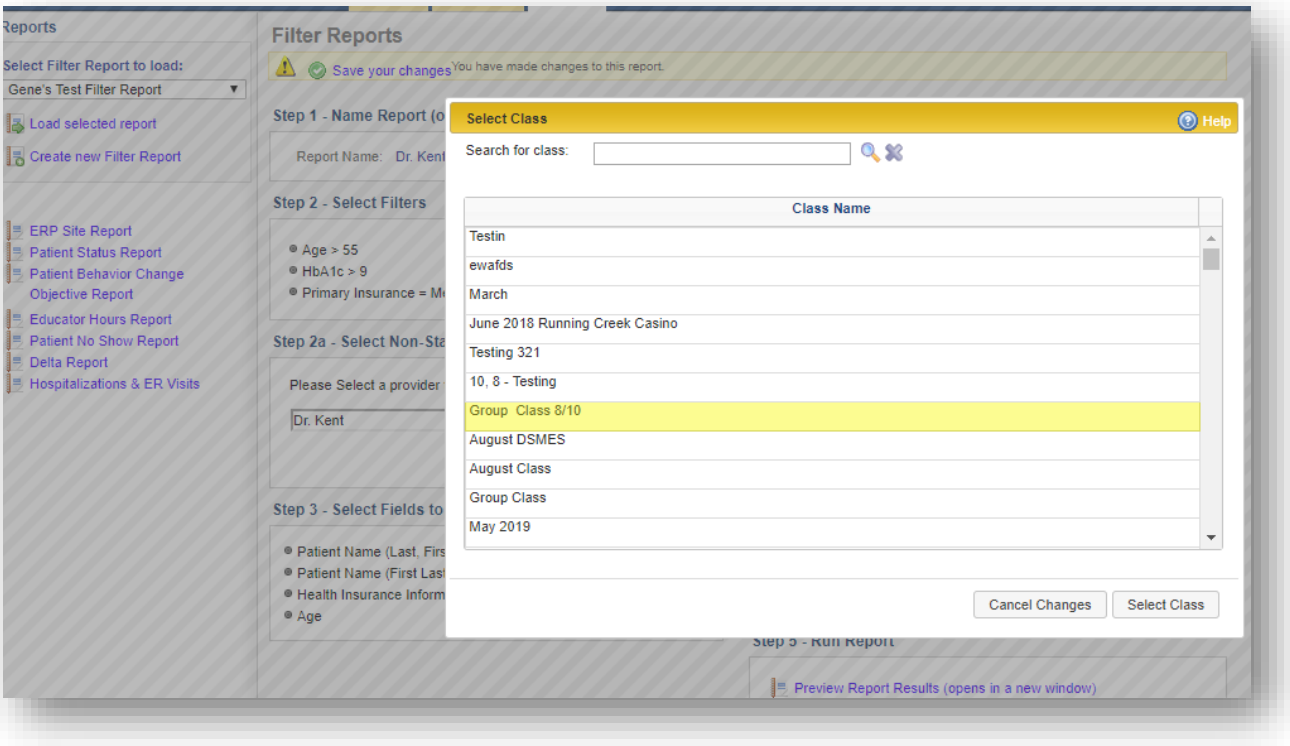
E. Step 4- The report can be limited to only include patients that fit into any of the categories below:

a. Any patient that has a DSMES or Follow up session documented and marked as attended during this range
b. Any patient that has an encounter such as lab or behavior goal documented (entered or updated) during this range (Minimal Capacity)
c. Any patient that has either DSMES session or an encounter documented during that period

The default range is within the last 12 months, but you can enter other ranges. Note that reports only include active (non-archived) patients.



F. Step 4 Option 3 – Select only patients in a specific class. This option will allow you to filter by any class within the system for this site.



G. Step 5- When all of the steps have been defined, select the Preview Report Results link. This will open a window showing the results of your report. There are download options for this report:

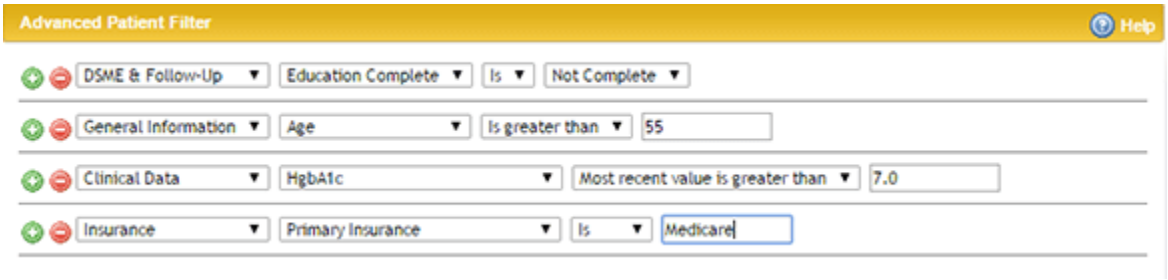
a. Preview Reports – Web Based version of Excel spreadsheet
b. Excel Spreadsheet
c. Delta Report – Aggregate data such as change in Behavioral Goals, A1c, Blood Pressure, etc.

Below are the examples of the report export options:

1. Filter Report Example - Excel Spreadsheet with individual participant data:

The filter report example below indicates this specific filter will export participant data for pts. that have the following information documented in Chronicle:

- Education is documented as Complete
- Age is greater than 55
- Most recent HgbA1c value is greater than 7.0
- Primary Insurance type is Medicare



Once the filters have been set, the data export will look similar to the example below. The report offers you the option to include participant demographics, insurance information, pre/post clinical & lab data and more.

Patient ID	Patient Name (Last, First)	HbA1c	HgbA1c Date	HgbA1c (first value)	HgbA1c Date (first value)	Health Insurance Information
1234	Patient, DSME	7.2	5/1/2015	7.8	10/30/2014	Medicare

2. Filter Report Example - Delta Report:

This is a report that reflects how a data point has changed. For patients' data to be aggregated in this report, the patient must have at least 2 documented entries with at least one follow up entry during the data period. For labs, the patient needs to have at least 2 values documented, at least 30 days apart. For goals, there needs to be at least a baseline and 1 goal review. For goals, there is no minimum requirement for how far apart the baseline and review is.

Example for Behavior Change Objectives:

For the low, high and average:

- **# High**: this is the highest single value found.
- **# Average**: this is an average of all the values found.
- **# Low:** This is the lowest single value found.

Example:

Patient 1: Baseline 0% Assessment 75%
Patient 2: Baseline 0% Assessment 50%
Patient 3: Baseline 25% Assessment 100%

Goals	n		Pre	Post	Avg
		High	25	100	75
Nutritional Management	3	Avg	8.33	75	66.67
		Low	0	50	50

Pre Avg: All Baseline Results / # of Patients (0 + 0 +25 / 3 = **8.33%**)
Post Avg: All Assessment Results / # of Patients (75 + 50 + 100 / 3 = **75%**)
Avg Degree of Change: All Degrees of change / # of patients (75 + 50 + 75 / 3 = **66.67%**)
Total # of Patients: Total number of patients with two or more results for the specific goal

Example for Clinical and Lab Data:

For the low, high and average:

- **# High**: this is the highest single value found.
- **# Average**: this is an average of all the values found.
- **# Low:** This is the lowest single value found.

Example:

Patient 1: Initial HbA1c 8.0% f/u HbA1c 7.0%
Patient 2: Initial HbA1c 9.0% f/u HbA1c 7.5%
Patient 3: Initial HbA1c 8.0% f/u HbA1c 6.5%

Labs					
	n		**Pre**	**Post**	**Change**
		High	9	7.5	1.5
A1c	3	Avg	8.33	7	1.33
		Low	8	6.5	1.5

Pre Avg: Sum of all initial HbA1c results / # of Patients (8.0 + 9.0 + 8.0 / 3 = **8.33%**)
Post Avg: Sum of all f/up HbA1c results / # of Patients (7.0 + 7.5 + 6.5 / 3 = **7%**)
Avg Degree of Change: Sum of all HbA1c changes / # of patients (1.0 + 1.5 + 1.5 / 3 = **1.33%**)
Total # of Patients: Total number of patients with two or more results for the specific lab value.

Additional Clinical and Lab Data

Within the Delta Report you will also see other clinical measures such as the % of participants seen that have foot exams documented, A1c<7 as well as the percentage of participants that had a decrease in certain labs.

## Measures (single value) ####		
	number of participants in report	Percentage
Foot exams	17	11.76
A1c < 7	17	41.18
BP Systolic <= 130	1	0
BP Diastolic <= 80	1	100
BP both <= 130 & 80	1	0
## Measures (decreased value) ####		
	number of participants in report	Percentage
Decrease in A1c	17	88.24
Decrease in Weight	2	100
Decrease in Bp systolic	1	0
Decrease in Bp diastolic	1	0
Decrease in Total Cholesterol	0	
Decrease in HDL	0	
Decrease in LDL	0	
Decrease in Trigs	0	

Helpful Tips:

- **To pull a report for all patients within the system**; choose *General Information* > *Age* > *Is greater than* > *0* (Step 2 Select Filters section).
- There is no limit to the number of filters you can apply to the report in (Step 2).