

Using Analytics

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What Is Analytics?

Analytics enables you to generate comprehensive reports on a variety of metrics within your practice such as productivity, patient demographics, CPT code frequency, and much more. You can customize and review your reports within the browser application or export the raw data as a spreadsheet directly to your computer. You can even save PDF versions of reports to print, email, and share with others.



Reports generated using Analytics are based on data from finalized exams within the last three years. The data from your finalized exams is transferred to the Analytics reporting feature nightly. This means that when you finalize an exam it won't be factored into your reports until the following day. Analytics does not pull data from your practice management system.

Getting Started With Analytics

Before you start generating reports, you'll need to set up permissions for users through administration. It will also help to familiarize yourself with the basics of Analytics. This section covers the following topics:

- [Setting Up Analytics Permissions on page 4](#)
- [Navigating Analytics on page 5](#)
- [Reviewing Reports on page 6](#)
- [Bookmarking Reports on page 9](#)
- [Exporting Reports on page 10](#)

Setting Up Analytics Permissions

If a user has not been assigned permission to use Analytics, they won't be able to see or access the Analytics feature in Eyefinity EHR.

To assign Analytics permissions to a user

1. Log in to Eyefinity EHR using your Firm Admin credentials.
2. Click the **User Permissions** tab on the ribbon at the top of the page.
3. Select the check box for any user(s) you want to assign permissions to.
4. Click the **Bulk Actions** button.

5. Select the checkbox for **Change Clinical Analytics**.
6. Select one of the following permissions settings to be applied to the user(s) you've selected:
 - **None**. The user(s) cannot see or access Analytics.
 - **My Data**. The user(s) can access Analytics but won't be able to generate reports that include data from visits they aren't associated with.
 - **All Data**. The user(s) can access Analytics and generate practice-wide reports based on all visits within Eyefinity EHR.
7. Click the **Save** button.

Permissions appear under the Clinical Analytics column. You can also click **Edit** under the Actions column to edit permissions for a particular user.



Changes to permissions may require up to 24 hours to take effect.

Navigating Analytics

Clicking the **Analytics** tab takes you to the Analytics dashboard. From there, you can view the following types of reports:

- **Clinical and Operational**. Reports covering business aspects of your practice such as productivity, coding summaries, and patient demographics. For more information on the reports included in this section, see [Generating Clinical and Operational Reports on page 11](#).
- **Specialty Specific**. Reports that are specific to eye care. For more information on the reports included in this section, see [Generating Specialty Specific Reports on page 12](#).

Clicking either of these two options displays a variety of reports you can choose from. Selecting a report generates and opens it.

Almost every report has the following two display options:

- **Visualization**. A collection of visuals such as bar graphs and pie charts that you can evaluate at a glance. Selecting a report from the main menu typically takes you to that report's visualization.
- **Custom Report**. The raw data of the report in a spreadsheet format. You can decide what information appears by selecting dimensions and measures from the options along the side of the screen. To view custom reports, you'll need to click the **Custom Report** button from within a visualization.

For more information on these report formats, see [Reviewing Reports on page 6](#).

To exit the report you're viewing, click the **Return to Menu** button. You can also use the navigation bar at the top of the screen to view the next/previous report or jump to a specific report by selecting a sheet from the drop-down list.

i Many buttons and visuals within Analytics reveal additional information when you hover your mouse over them. If you're ever trying to figure out what something is, try hovering your mouse over it to see if a tooltip appears.

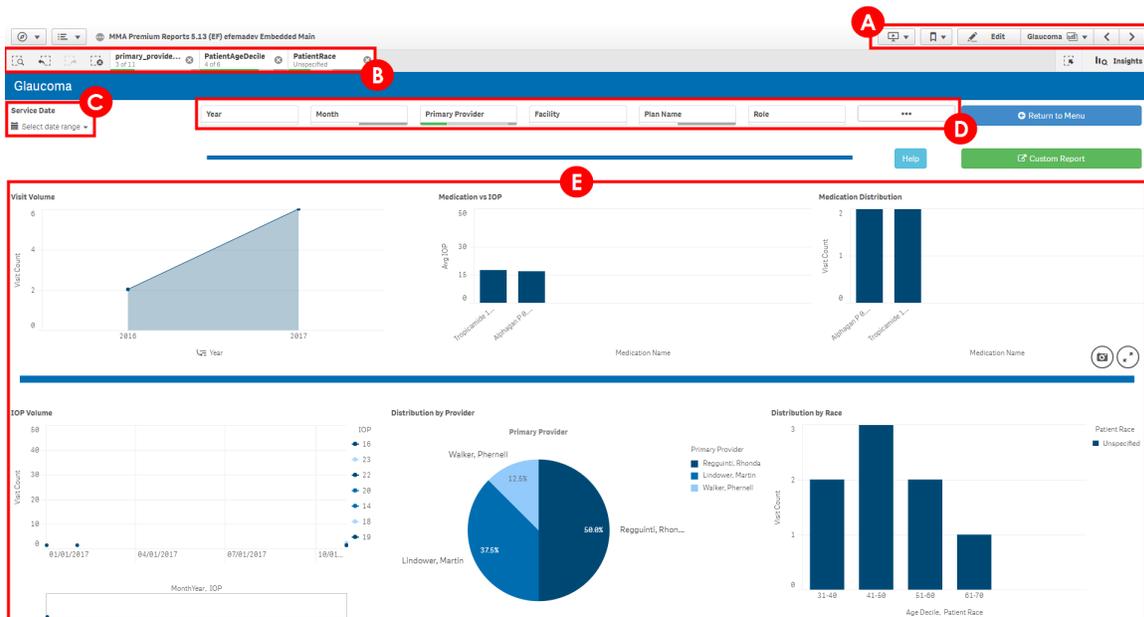
Reviewing Reports

While every report is different, almost all of them can be categorized as either a visualization or a custom report. This section covers the following topics:

- [Reviewing Visualizations on page 6](#)
- [Reviewing Custom Reports on page 8](#)

Reviewing Visualizations

Whenever you generate a report from the main menu, you're taken to that report's visualization, if it has one.



Each visualization has the following key sections:

- A. **Navigation Bar.** Enables you to navigate through Analytics using the forward and back buttons or the drop-down list. You can also bookmark reports and create stories from

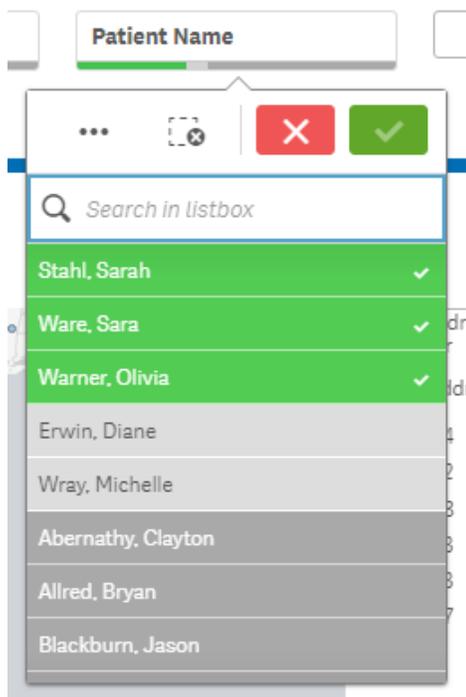
here. For more information, see [Bookmarking Reports on page 9](#) and [Creating Presentations Using Stories on page 14](#).

- B. **Filters Toolbar.** Displays the filters that are currently selected. Filters enable you to narrow a report down based on factors such as time, provider, diagnosis, and more. The buttons on the left allow you to search for filters, undo or redo a filter selection, or clear all filters you've selected. You can remove a single filter by clicking the x on that filter.



Just like sticky fields throughout the rest of Eyefinity EHR, filters remain "sticky" even after you navigate to a different report.

- C. **Date Selector.** Enables you to narrow down results based on a range of dates.
- D. **Filter Lists.** Clicking on any of these buttons reveals a drop-down list of filters you can select from. When you select a filter from the drop-down list, it's added to the Filters Toolbar.



Selected filters are highlighted in green. If a filter is highlighted in dark gray, that means there's either no data associated with that parameter or it conflicts with another filter you've already selected. For example, when you select "Female" as a filter, the names of

male patients will be grayed out to indicate that they currently fall outside the parameters of the report.

Click the green check mark button at the top of the list to save the filters you've selected or click the red x button to close the list without saving your changes.

E. **Visualized Data.** The graphics that appear here vary depending on what report you're viewing. Hovering your cursor over a graphic reveals additional options, including a button that expands the graphic to a full screen view. You can also filter data by clicking directly on a visual such as a section of a pie chart or a plotted point on a line graph.

You can view the raw data behind a chart by right-clicking it and selecting **View data**. To change it back, right-click it again and select **View chart**. You can also view the raw data for an entire report by clicking the **Custom Report** button. For more information, see [Reviewing Custom Reports on page 8](#).

Reviewing Custom Reports

Custom reports enable you to view a report's raw data as a spreadsheet. The controls for selecting filters and navigation are identical to those used in visualizations. For more information, see [Reviewing Visualizations on page 6](#).

The screenshot shows a web application interface for a 'Glaucoma Custom Report'. At the top, there are filter controls for 'Service Date' (Year, Month), 'Primary Provider', 'Facility', 'Plan Name', and 'Role'. Below this is a 'Data Sets' section with a dropdown menu set to 'Glaucoma'. A 'Dimensions' sidebar on the left lists various data points like 'Facility', 'IOP', 'IOP Method', 'Medication Name', 'OD/OS', 'Patient DOB', 'Patient MRN', 'Patient PMS ID', 'Primary Provider', and 'Service Date'. The main area contains a table with columns for 'Primary Provider', 'OD/OS', 'IOP', 'IOP Method', 'Medication Name', 'Patient Name', 'Patient DOB', 'Service Date', 'Patient Count', and 'Visit Count'. The table data includes entries for patients like Rhonda Reggunti and Gavin Reaves, with various eye drop medications and service dates. A 'Measures' sidebar on the left shows 'Patient Count' and 'Visit Count'.

Primary Provider	OD/OS	IOP	IOP Method	Medication Name	Patient Name	Patient DOB	Service Date	Patient Count	Visit Count
Totals									
Reggunti, Rhonda	OO	14	NCT	Alphagan P 0.15 % eye drops	Allred, Bryan	09/13/1984	11/08/2017	1	1
Reggunti, Rhonda	OS	14	NCT	Alphagan P 0.15 % eye drops	Allred, Bryan	09/13/1984	11/08/2017	1	1
Reggunti, Rhonda	OO	19	NCT	Alphagan P 0.15 % eye drops	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Reggunti, Rhonda	OS	20	NCT	Alphagan P 0.15 % eye drops	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Reggunti, Rhonda	OO	14	NCT	Tropicamide 1% / Phenylophrine 2.5%	Allred, Bryan	09/13/1984	11/08/2017	1	1
Reggunti, Rhonda	OS	14	NCT	Tropicamide 1% / Phenylophrine 2.5%	Allred, Bryan	09/13/1984	11/08/2017	1	1
Reggunti, Rhonda	OO	18	NCT	Tropicamide 1% / Phenylophrine 2.5%	Allred, Bryan	09/13/1984	11/16/2017	1	1
Reggunti, Rhonda	OS	18	NCT	Tropicamide 1% / Phenylophrine 2.5%	Allred, Bryan	09/13/1984	11/16/2017	1	1
Reggunti, Rhonda	OO	18	NCT	Tropicamide 1% / Phenylophrine 2.5%	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Reggunti, Rhonda	OS	18	NCT	Tropicamide 1% / Phenylophrine 2.5%	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Reggunti, Rhonda	OO	19	NCT	Tropicamide 1% / Phenylophrine 2.5%	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Reggunti, Rhonda	OS	19	NCT	Tropicamide 1% / Phenylophrine 2.5%	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Reggunti, Rhonda	OO	20	NCT	Tropicamide 1% / Phenylophrine 2.5%	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Reggunti, Rhonda	OS	20	NCT	Tropicamide 1% / Phenylophrine 2.5%	Reaves, Gavin	11/30/1972	11/27/2017	1	1
Lindowet, Martin	OO	16	GOLDMANN	-	Comprehensive, Connie	09/09/1958	01/09/2017	1	1
Lindowet, Martin	OS	16	GOLDMANN	-	Comprehensive, Connie	09/09/1958	01/09/2017	1	1
Lindowet, Martin	-	-	-	-	Comprehensive, Connie	09/09/1958	10/13/2016	1	1
Lindowet, Martin	-	-	-	-	Smith, John	05/08/1973	09/05/2016	1	1
Walker, Phirell	OO	22	NCT	-	Ware, Sara	02/04/1950	02/27/2017	1	1
Walker, Phirell	OS	23	NCT	-	Ware, Sara	02/04/1950	02/27/2017	1	1

In addition to filters, you can modify custom reports using the following elements:

- A. **Data Sets.** Displays the data set that is currently selected. Clicking the gear icon enables you to export your current spreadsheet to your computer as a .xlsx file. For more information on exporting reports, see [Exporting Reports on page 10](#).



You can open .xlsx files using programs such as Microsoft Excel, Apache OpenOffice Calc, and Google Sheets.

- B. **Patient Data Table.** Shows the dimensions and measures you've selected. Click the x for a dimension or measure to remove it.
- C. **Dimensions and Measures.** Enables you to select which columns of data appear in the spreadsheet. You can search for a particular dimension or measure by clicking the magnifying glass and typing the name of the term you're looking for.
- D. **Spreadsheet.** Displays data based on the filters, dimensions, and measures you've selected. You can click a column heading to sort by that column or drag the heading to change the order of columns. You can also select and deselect filters by clicking on data directly.

Bookmarking Reports

Bookmarking a report saves the filters you've selected so that you can quickly return to that report and see the exact information you're looking for at any time. Bookmarking is not the same as saving a report. Bookmarked reports will continue to update every time new data is transmitted to Analytics.

To bookmark a report

1. Click the bookmark icon to open the bookmark library.



2. Select **Create new bookmark**.

The bookmark is created, and you're shown the bookmark properties. You can edit the title and description of the bookmark from here or delete it by clicking the trash can icon.

To edit or delete a bookmark

1. Click the bookmark icon to open the bookmark library.
2. Hover your cursor over a bookmark and click the information icon that appears on the far right.

3. Click the pencil icon to edit the bookmark.
4. Click the trash can icon to delete the bookmark.

Exporting Reports

You can export entire reports or subsets of data in a variety of formats.

To export a report as a spreadsheet

1. Open a custom report.
2. Verify that the spreadsheet appears as you would like it to.
3. Click the gear icon next to Data Sets.
4. Click **Export data**.

A window appears, notifying you when your download is ready.

5. Click the link to download your .xlsx file.



You can open .xlsx files using programs such as Microsoft Excel, Apache OpenOffice Calc, and Google Sheets.

To export a report as a PDF

1. Open a visualization.
2. Click the menu button at the top left of the screen.
3. Select **Export sheet to PDF** from the drop-down list.

A window with the following options appears:

- **Paper size.** Configures the page size of the PDF.
 - **Resolution.** Determines the resolution of the PDF. More dots per inch will increase the quality of the image but also increase the file size.
 - **Orientation.** Configures the orientation of the page.
 - **Aspect ratio options.** Sets the layout of the graphics. Selecting **Keep current size** preserves the layout of the graphics as they appear on your screen, while selecting **Fit to page** arranges the graphics so that the entire page is filled.
4. Click **Export** once you've configured your PDF options.

The PDF begins generating. This process may take several seconds to complete. When the process is finished, a download link appears.

5. Click the link to download your PDF.

To export a specific graphic

1. Right-click the graphic.
2. Select **Export** from the drop-down list.
3. Select one of the following options:
 - **Export as an image.** Saves the graphic as a .png or .jpeg image.
 - **Export to PDF.** Saves the graphic as a PDF.
 - **Export data.** Saves the graphic as a data spreadsheet.

Generating Clinical and Operational Reports

Clinical and Operational reports cover business aspects of your practice such as productivity, coding summaries, and patient demographics. A full list of the reports and their functions can be found below.

- **Advanced Clinical Targeting.** Target a particular group of patients and generate a detailed patient list.
- **Attendee/Scribe Productivity.** View productivity for users who have been listed as a scribe or attendee on a visit.
- **Coding Summary.** Examine procedure data by ICD 10 and CPT code.
- **Medications Inside Visit.** View data related to prescriptions written within a visit in Eyefinity EHR.
- **Medications Inside/Outside Visit.** View data related to all prescriptions written in Eyefinity EHR.
- **Outbound Faxes.** View data on faxes sent from Eyefinity EHR.
- **Override Billing.** Examine data for any visit where billing codes were overwritten in Eyefinity EHR. Keep in mind, this report does not cover any billing changes that have occurred after charges have been sent to the practice management side of the platform.
- **Pathology Census.** View data on pathology specimens by provider, vendor, and result flag.

- **Patient Demographics.** View demographic data for patients in your practice. Only patients who have at least one finalized visit in Eyefinity EHR are factored into this report.
- **Referring Providers.** Examine data on referring providers that send patients to your office. Information for this report is pulled from the Referring Provider field in the patient's chart.
- **RVU Census.** View the corresponding relative value units (RVU) for CPT codes in your practice by provider, patients, visit, and total over time.
- **Task Management.** View data related to the Task Management feature in Eyefinity EHR.
- **Time To Finalize.** Visualize finalization patterns by provider, facility, and CPT code. Keep in mind that the Average Time to Finalize metric does not factor in any visits that are more than seven days old. Additionally, visits that have a finalize time greater than three months are excluded from all calculations.

Generating Specialty Specific Reports

Specialty Specific reports cover data related to eye care. A full list of the reports and their functions can be found below.

- **Cataract.** View cataract data by visit count, findings, ocular history, procedures, and more.
- **Co-management.** View data related to comanagement. Only visits where the Comanagement plan was selected will be factored into this report.
- **Diagnosis Drill Down.** Choose a diagnosis and view data related to that specific diagnosis such as visit count, IOP, ocular history, procedures, and more.
- **Dry Eye Syndrome.** View data on visit count, medication, procedure, and more for patients with Dry Eye Syndrome and/or Keratoconjunctivitis Sicca.
- **Eye Log.** Monitor treatment and prescribing habits using data related to visit volume, procedures, medications, and specific eye care measurements.
- **Glaucoma.** View glaucoma visit data by visit count, IOP, ocular history, procedures, and more.
- **Macular Degeneration.** View data on visit count, medication, procedure, and more for patients with any one of the following conditions: Branch Retinal Artery Occlusion, Branch Retinal Vein Occlusion, Central Retinal Artery Occlusion, Central Retinal Vein Occlusion, Wet Macular Degeneration, Dry Macular Degeneration, and Post-op Diabetic Macular Edema.

- **Practice Census.** View patient encounters by volume, diagnoses, and plan distribution. You can also compare your encounter data to that of other doctors in the CMS population.

Using Advanced Analytics Features

This section covers the following additional features within Analytics:

- [Using the Exploration Menu on page 13](#)
- [Taking Snapshots on page 13](#)
- [Creating Presentations Using Stories on page 14](#)

Using the Exploration Menu

The exploration menu lets you customize the way a particular graphic appears within a visualization. To access the exploration menu for a graphic, right-click it and select **Open exploration menu**.



You can also access the exploration menu by hovering your mouse over a graphic and clicking the exploration menu icon that appears.

Using the menu on the right side of the screen, you can customize several of a graphic's features, such as its dimensions, measures, format, and color scheme.

Taking Snapshots

You can save a graphic that appears within a visualization by taking a snapshot of it. When you take a snapshot, it's saved into your snapshot library. Snapshots can be placed from your library directly onto story slides. For more information on stories, see [Creating Presentations Using Stories on page 14](#).

To take a snapshot

1. Right-click a graphic within a visualization.
2. Select **Take snapshot**.

The snapshot is saved to your library, and a window appears where you can add an annotation to the snapshot. Make sure to click **Save** if you add any annotations.



You can also take a snapshot by hovering your cursor over a graphic and clicking the camera icon that appears.

To delete a snapshot from your library

1. Right-click the graphic you took a snapshot of.
2. Select **Open snapshot library**.



If you're not seeing any snapshots, you may have right-clicked the wrong graphic. Each graphic within a visualization has its own snapshot library.

3. Click the pencil icon.
4. Select the check box for each snapshot you'd like to delete.
5. Click the trash can icon.

Creating Presentations Using Stories

Using stories, you can create interactive slide show presentations that can be shared from within Analytics. Slides can also be exported into either a PowerPoint or PDF format.

To create a story

1. Click the story button.



2. Click **Create new story**.

The story is created, and a drop-down window appears where you can enter a title and description for the story. You can click the trash can icon to delete the story.

Clicking on a story's thumbnail opens the story. Designing a story is similar to designing a PowerPoint presentation. You can use the tools along the right side of the screen to add text, shapes, visualizations, custom reports, and more directly into the story. Any changes you make are saved automatically.

To present a story

1. Open the story you'd like to present.
2. Click the play button.

Any reports you've embedded into a story are "live", which means you can interact with them by clicking on them as if you were in the report itself. For instance, clicking on a

section of a pie chart will filter data on a slide without you having to leave the presentation.

If you do want to navigate to a report directly, you can click **Go to sheet**. You can return to the presentation at any time by clicking **Return**.

To export a story

1. Open the story you'd like to export.
2. Click the menu button in the top left corner of the screen.
3. Select **Export story to PowerPoint** or **Export story to PDF** from the drop-down list.
4. Configure any layout options you'd like to adjust.
5. Click **Export**.

The export begins generating. This process may take a few minutes to complete. When the process is finished, a download link appears.

6. Click the link to download your export.