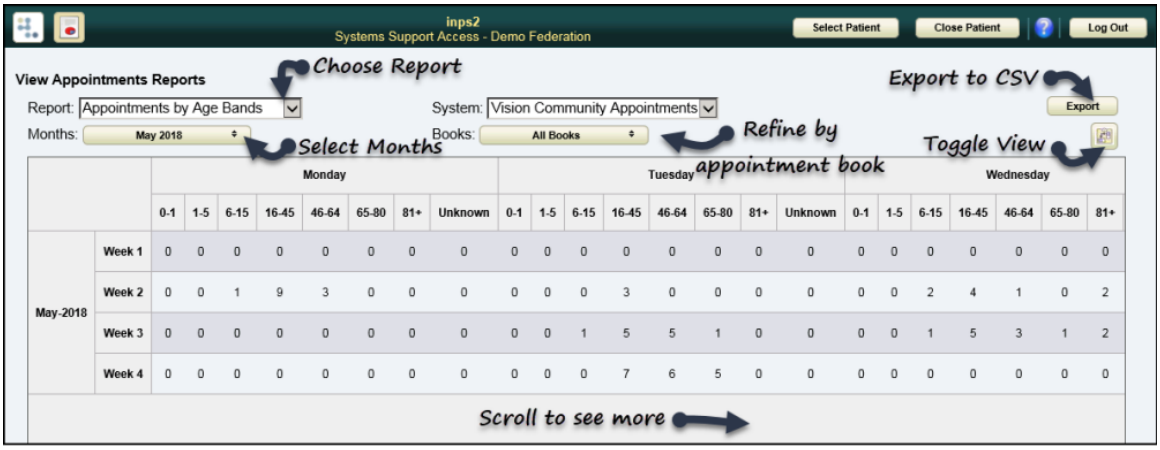
# Reporting Overview

**Reporting** for Shared Care allows organisations to monitor their appointments activity and provide valuable information to review the models of care provided.

The **Reporting** module provides a library of predefined queries to analyse activity against patient cohorts, hubs and organisations for the last 18 months:




The reports can also be exported to CSV.

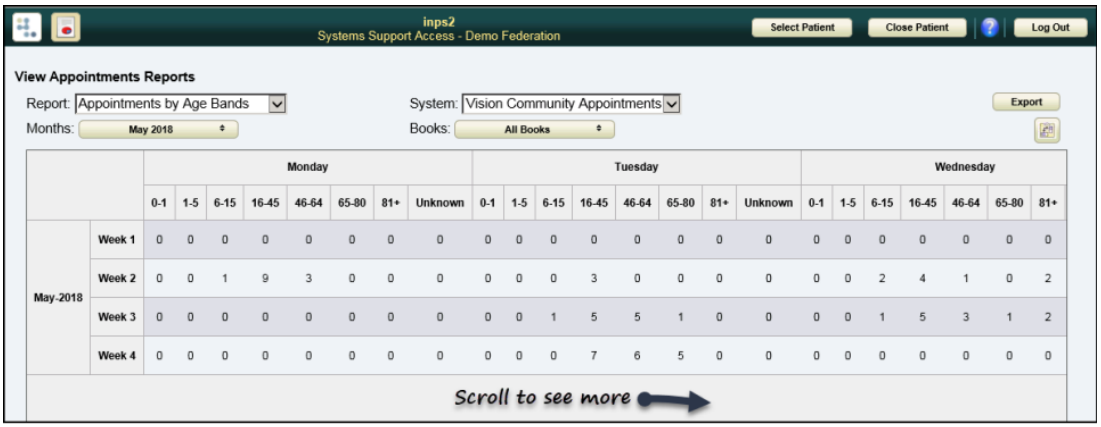
See Report Library on page 2 and Running Reports on page 5.

# Report Library

The predefined reports detail appointment activity by Day / Week / Month / Year.

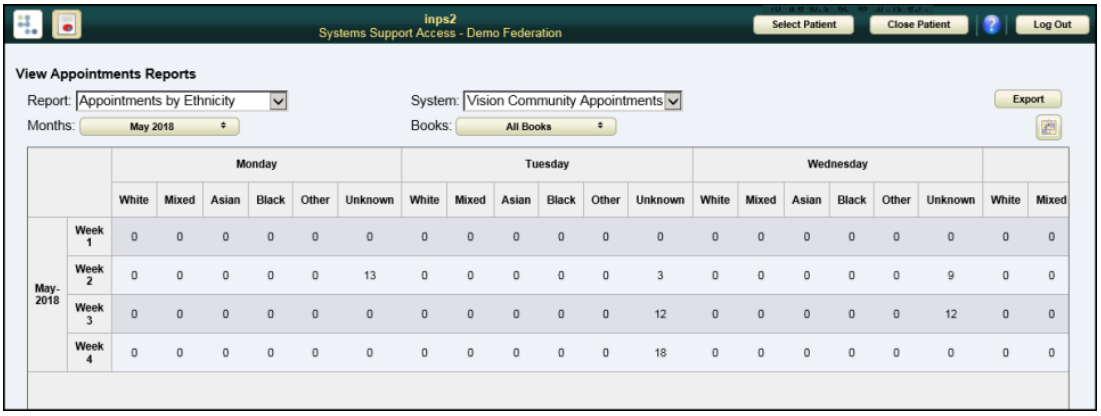
The **Report Library** includes the following reports:

- **Appointments By Patient Age Bands** - Age groups: 0-1 / 1-5 / 6-15 / 16-45 / 46-64 / 65-80 / 81+ / Unknown:



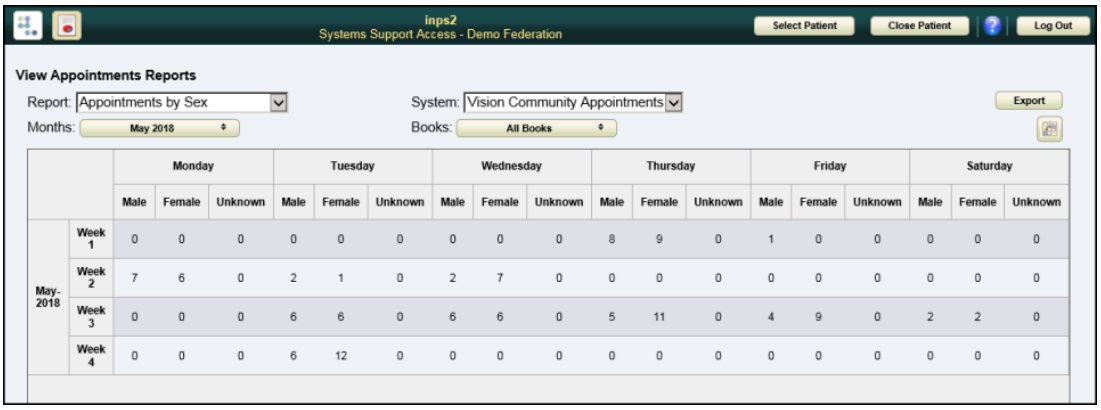

| | | Monday | | | | | | | | Tuesday | | | | | | | | Wednesday | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | 0-1 | 1-5 | 6-15 | 16-45 | 46-64 | 65-80 | 81+ | Unknown | 0-1 | 1-5 | 6-15 | 16-45 | 46-64 | 65-80 | 81+ | Unknown | 0-1 | 1-5 | 6-15 | 16-45 | 46-64 | 65-80 | 81+ |
| May-2018 | Week 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Week 2 | 0 | 0 | 1 | 9 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 4 | 1 | 0 | 2 |
| | Week 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 5 | 5 | 1 | 0 | 0 | 0 | 0 | 1 | 5 | 3 | 1 | 2 |
| | Week 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7 | 6 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

- **Appointments By Patient Ethnicity** - Ethnicity groups: White / Mixed / Asian / Black / Other / Unknown:



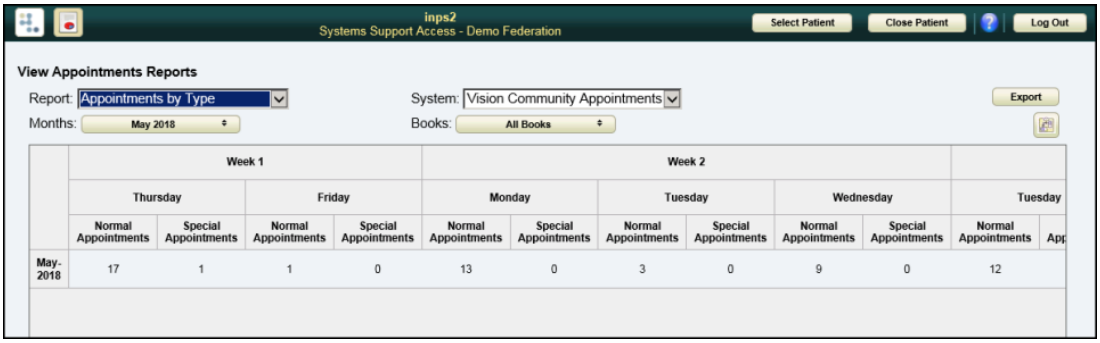

| | | Monday | | | | | | Tuesday | | | | | | Wednesday | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | White | Mixed | Asian | Black | Other | Unknown | White | Mixed | Asian | Black | Other | Unknown | White | Mixed | Asian | Black | Other | Unknown | White | Mixed |
| May-2018 | Week 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Week 2 | 0 | 0 | 0 | 0 | 0 | 13 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 9 | 0 | 0 |
| | Week 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 0 | 0 | 0 | 0 | 0 | 12 | 0 | 0 |
| | Week 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 18 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

- **Appointments By Patient Sex** - Groups: Male / Female / Unknown:



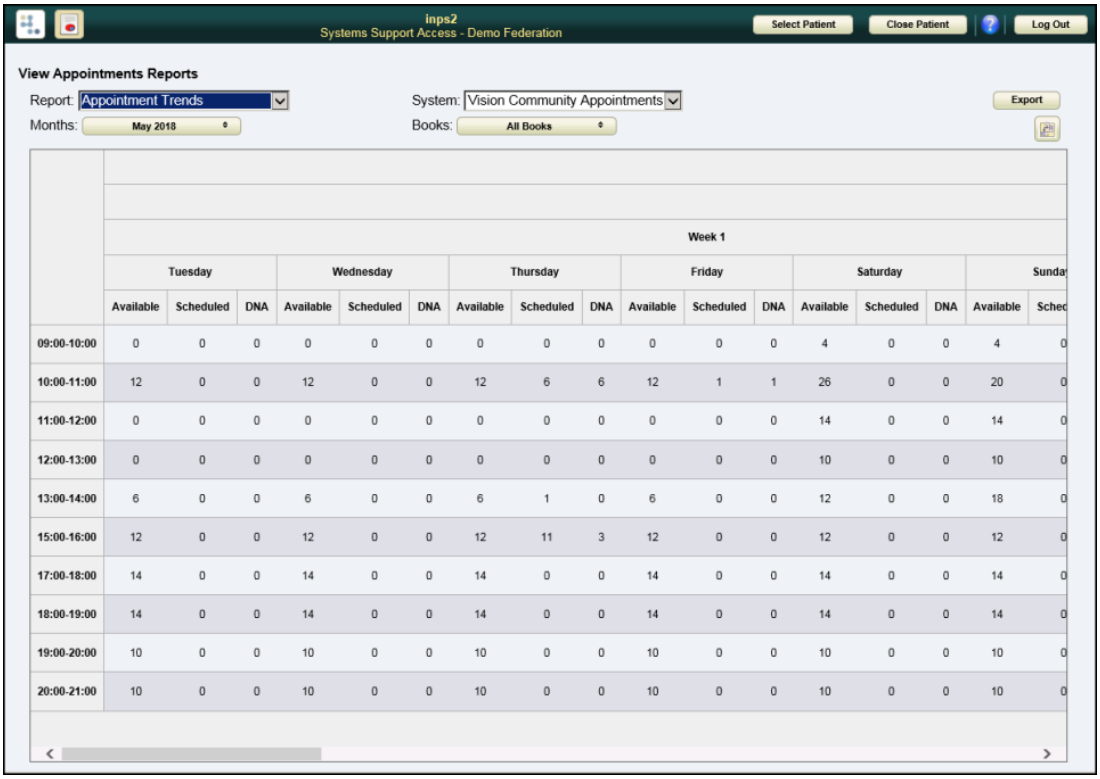

| | | Monday | | | Tuesday | | | Wednesday | | | Thursday | | | Friday | | | Saturday | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Male | Female | Unknown | Male | Female | Unknown | Male | Female | Unknown | Male | Female | Unknown | Male | Female | Unknown | Male | Female | Unknown |
| May-2018 | Week 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8 | 9 | 0 | 1 | 0 | 0 | 0 | 0 | 0 |
| | Week 2 | 7 | 6 | 0 | 2 | 1 | 0 | 2 | 7 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | Week 3 | 0 | 0 | 0 | 6 | 6 | 0 | 6 | 6 | 0 | 5 | 11 | 0 | 4 | 9 | 0 | 2 | 2 | 0 |
| | Week 4 | 0 | 0 | 0 | 6 | 12 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

- **Appointments by Type** - Groups: Patient appointments / Special bookings:



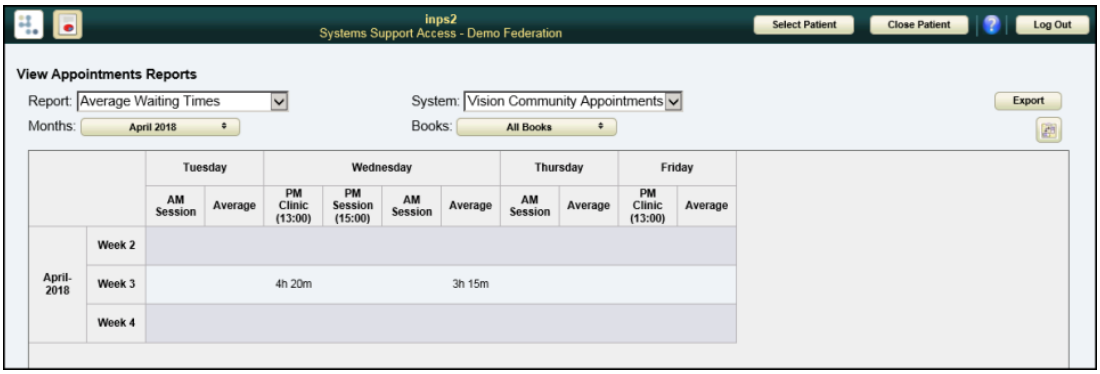

| | Week 1 | | | | Week 2 | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Thursday | | Friday | | Monday | | Tuesday | | Wednesday | | Tuesday | |
| | Normal Appointments | Special Appointments | Normal Appointments | Special Appointments | Normal Appointments | Special Appointments | Normal Appointments | Special Appointments | Normal Appointments | Special Appointments | Normal Appointments | App |
| May-2018 | 17 | 1 | 1 | 0 | 13 | 0 | 3 | 0 | 9 | 0 | 12 | |

- **Appointment Trends** - Appointments groups: Available / Scheduled / DNA
  Slot counts display in hourly intervals from 09:00 to 21:00:



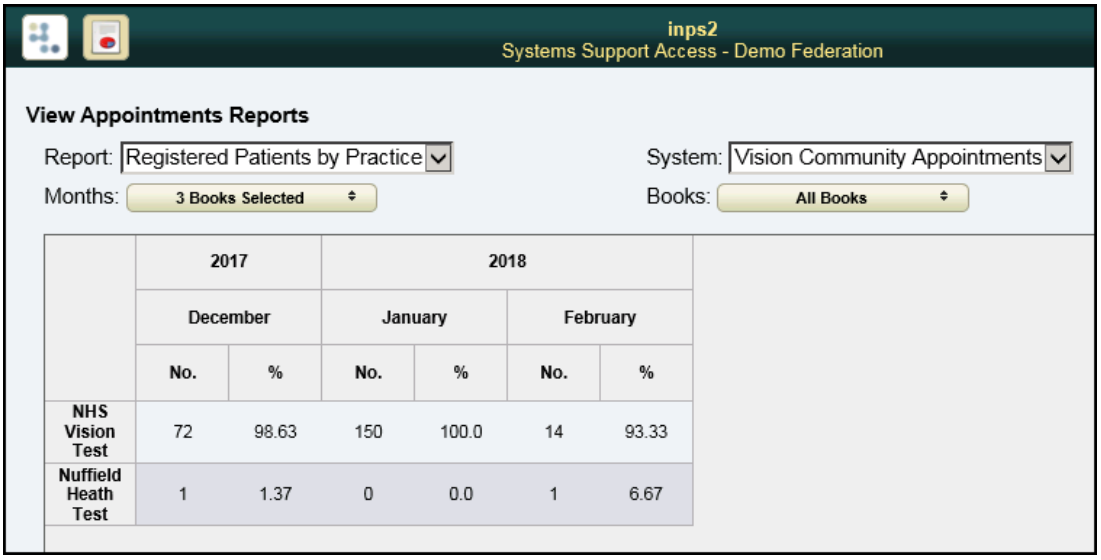

| | Week 1 | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Tuesday | | | Wednesday | | | Thursday | | | Friday | | | Saturday | | | Sunda | |
| | Available | Scheduled | DNA | Available | Scheduled | DNA | Available | Scheduled | DNA | Available | Scheduled | DNA | Available | Scheduled | DNA | Available | Schec |
| 09:00-10:00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 0 | 4 | 0 |
| 10:00-11:00 | 12 | 0 | 0 | 12 | 0 | 0 | 12 | 6 | 6 | 12 | 1 | 1 | 26 | 0 | 0 | 20 | 0 |
| 11:00-12:00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 14 | 0 | 0 | 14 | 0 |
| 12:00-13:00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 10 | 0 | 0 | 10 | 0 |
| 13:00-14:00 | 6 | 0 | 0 | 6 | 0 | 0 | 6 | 1 | 0 | 6 | 0 | 0 | 12 | 0 | 0 | 18 | 0 |
| 15:00-16:00 | 12 | 0 | 0 | 12 | 0 | 0 | 12 | 11 | 3 | 12 | 0 | 0 | 12 | 0 | 0 | 12 | 0 |
| 17:00-18:00 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 |
| 18:00-19:00 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 | 0 | 14 | 0 |
| 19:00-20:00 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 |
| 20:00-21:00 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 | 0 | 10 | 0 |

- **Average Waiting Time** - Average in the Morning Session, Afternoon Session and Overall Daily Average:




| | | Tuesday | | Wednesday | | | | Thursday | | Friday | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | AM Session | Average | PM Clinic (13:00) | PM Session (15:00) | AM Session | Average | AM Session | Average | PM Clinic (13:00) | Average |
| April-2018 | Week 2 | | | | | | | | | | |
| | Week 3 | | | 4h 20m | | | 3h 15m | | | | |
| | Week 4 | | | | | | | | | | |

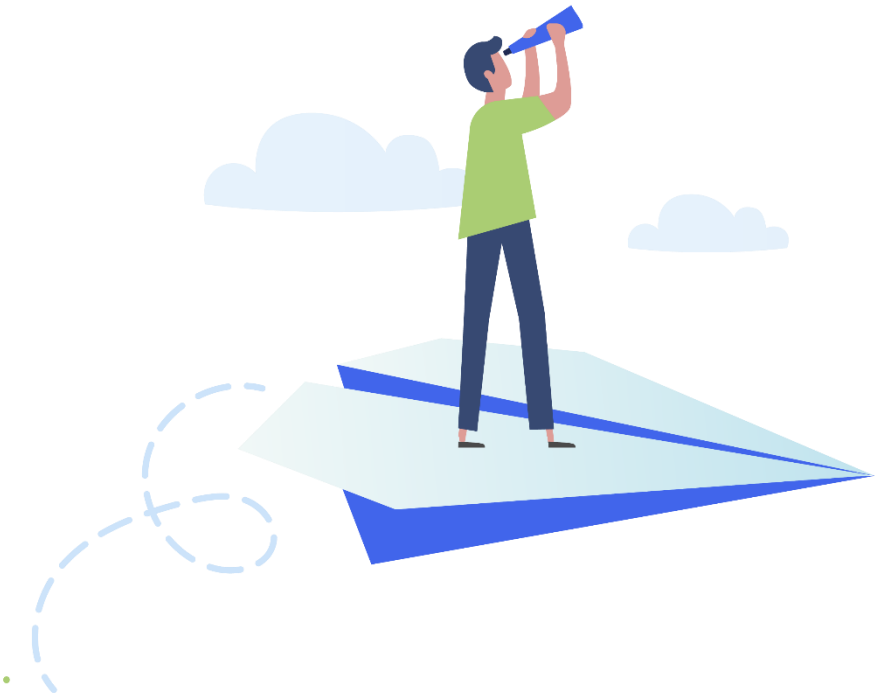
- **Registered Patients By Practice** - This report details appointments summarised by the patient's registered Practice Name, Number of Patients attending from the practice and the Percentage of patient appointments taken by that practice for the reporting month:




| | 2017 | | 2018 | | | |
|---|---|---|---|---|---|---|
| | December | | January | | February | |
| | No. | % | No. | % | No. | % |
| NHS Vision Test | 72 | 98.63 | 150 | 100.0 | 14 | 93.33 |
| Nuffield Heath Test | 1 | 1.37 | 0 | 0.0 | 1 | 6.67 |

**Note** - The database updates at approx 1am daily, and the reports are up to date as of close of business yesterday.

See Running Reports on page 5.



# Running Reports

**Note** - Reports are generated at approximately 1am daily, and include data as of close of business the previous day.

1. Log onto Clinical Portal using the **Systems Support** role.
2. Select **Appointments Reporting**

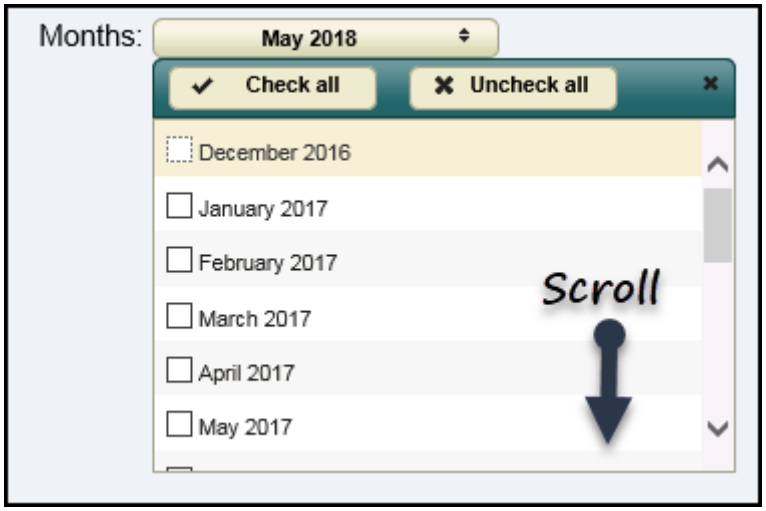
.
3. The **View Appointments Reports** screen displays, select the **Report** required from the drop down list:

Reports available:

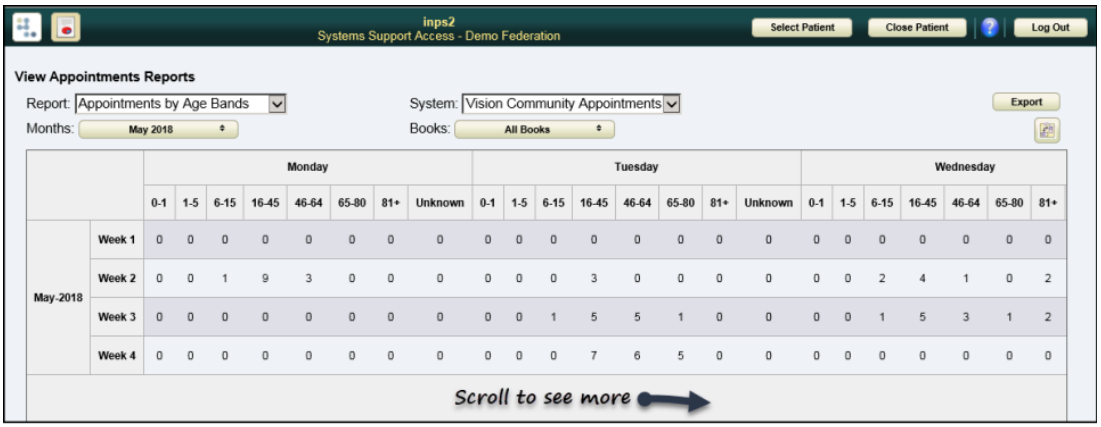
- Appointments by Age Bands
- Appointments by Ethnicity
- Appointments by Sex
- Appointments by Type
- Appointment Trends
- Average Waiting Times
- Registered Patients by Practice

See Report Library on page 2 for details.

4. Select the **Months** you wish to report on from the drop down list, scroll down to access the full list.
   The default is the current month, and you can report on up to 18 months, using **Check all** quickly selects all months:




5. Use the **System** drop down to choose the appropriate organisation. This option is greyed out if only one organisation is available.
6. The report defaults to **All Books**, if required choose the drop down to refine the selection, the output updates as the settings change.
7. The report displays:




- To change the report view, select **Toggle** .
- Choose **Export** to output the report to CSV.

See Reporting Overview on page 1 and Report Library on page 2 for details.