MAYO CLINIC LABORATORIES

# Activity Metrics

Quick Reference Guide

## Log in to Activity Metrics

1. On MayoClinicLabs.com, at top right, click **My Dashboard**.
2. Enter your **Professional username** (email address) and **Password**.
3. Click **Log in**.
4. Navigate to **My Dashboard** > **METRICS & REPORTS** > **Activity Metrics**.

   **Note:** For access, contact Customer Service.
5. Click the **Launch Activity Metrics** button.

## Functionality overview

On the **ACTIVITY METRICS** page:

- **Dashboard drop-down menu:** Shows all available dashboards.
- **Tableau Toolbar:** At top left, with the following icons: **Undo last action**, **Redo last action**, **Reset view** (to the view when dashboard was first opened), **Refresh data in this view**, **Pause data queries while applying actions**, **View**, and **Tableau Download**.
- **Tabs:** Each dashboard except **Summary** has two tabs. On the left-hand tab, data is visualized. From the right-hand tab, you can export data.
- **Icons at top right:** Depending on the dashboard, they are **Download**, **Information**, and **Help**.
- **Information Bar:** At left, **Row Counts** (number of rows appearing on main tab); at right, **Latest Update** (date/time stamp of most recent data refresh).
- **Scrolling:** Scroll up, down, left, and/or right to view additional data.

## Available dashboards

**Note:** For all dashboards, the default data range is the last 24 months, but you can adjust this range.

- **Summary:** Default when Activity Metrics opens. Provides overview of metrics measured by all other dashboards for any or **All** of last 24 full months.
  - No **Export** tab; data must be exported individually from each specific dashboard.
  - At bottom, **Proficiency Testing** values for Mayo Clinic Laboratories as a whole over last eight quarters.
- **Canceled Tests (CT):** Visualizes monthly volumes of tests canceled by either your organization or Mayo Clinic Laboratories.
- **Critical Callbacks (CC):** Visualizes the number of critical callbacks made by Mayo Clinic Laboratories. The **% Callbacks Meeting Criteria** line graph displays the monthly percentage of callbacks completed within 60 minutes of the callback request.
- **Revised Tests (RT):** Visualizes tests that have been revised over the selected time period. As well as filters, it lists **Revision Status** for each test: **Revised**, **Revised to Canceled**, **Revised Prior to Final**, or **Revised at Final**.
- **Service Touchpoints (ST):** Visualizes total number of case inquiries requiring additional resolution; organizes them by primary and secondary reasons for contact.
- **Turnaround Time (TAT):** Tracks time elapsed between specimen receipt at Mayo Clinic Laboratories and result reporting.
- **Volumes (VOL):** Visualizes the number of tests ordered as a line graph, sorted by date of order creation.

## Filter data

*Specific filters:*

- **Health System:** What you can see depends on user access.
- **Client Facility Account - Name:** Users with access to multiple sites within a health system can use this to include/exclude sites.
- **COVID Tests:** View all data, data for COVID-19 tests only, or all data except COVID-19 test data; include or exclude all SARS Test IDs, including PCR and serology-based tests. (**CT**, **RT**, **TAT**, **VOL**)
- **Mayo Test ID Name:** View data for one or more Test Codes. (all dashboards but **ST**)
- **ZW Referral Test ID Name:** View data for specific referral (ZW) tests only, all referral tests only, or all tests except referral tests. (**VOL**)
- **Ordered, Reflex or Add-on Test:** Specify test type. (**CT**, **RT**, **TAT**, **VOL**)
- **Mayo Order Number:** Search for a particular Mayo order number or within a range thereof, or view data from which certain order numbers have been excluded. (all dashboards but **VOL**)
- **Date selector:** Filter name depends on dashboard. View orders placed, callbacks made, or calls/fax inquiries made within a range of dates. Click each of the start and end date fields. Then, either enter the date manually or find/select it in the pop-up calendar.
- **Requesting Physician:** Filter tests by the physician(s) who requested them. (**CC**, **VOL**)
- **Callback Criteria Met:** View callback data based on whether callbacks met the required criteria. (**CC**)
- **Method:** Filter calls and fax inquiries by whether they were made via Message Center, another communication method, or any method. (**ST**)
- **Primary Reason Code/Secondary Reason Code:** Sort calls and fax inquiries by primary/secondary reasons for contact. (**ST**)
- **Performing Lab:** View tests performed by Mayo Clinic Laboratories, tests performed by other laboratories, or all tests. (**CC**, **CT**, **RT**, **VOL**)
- **Display Data for:** On either tab, filter by **Turnaround Time Summary**, **Orders Beyond TAT Target**, or **Turnaround Time Details** on **TAT**; and by **Volume Details** on **VOL**.
- Answer any **ASK AT ORDER ENTRY (AOE) QUESTIONS**.

*Other means of filtering:*

- In graphs and tables organized by date:
  1. Select your date range using the date selector.
  2. Hover to left of date labels or headers until the drill icons appear.
  3. Click the plus sign icon to drill down to weekly or daily view, or the minus sign icon to drill up to quarterly or yearly view.
- In bar charts, click a colored segment of a bar to filter the chart by criteria represented by the segment color and by the entire bar.
- Click a square in a legend to filter the main graph by the criterion the square represents.
- Narrow down data shown in a dashboard's main graph by clicking a table cell or row, or a bar in a smaller bar graph. You can combine these filters.
- Select a table row to filter the table by the criterion of that row.

*Clearing filters:*

- If the filter was set using a drop-down menu, click the **Cancel Filter** icon at top right of the menu.

- If the drop-down menu used to set the filter has check boxes, select **(All)** at top to select all check boxes, which clears the filter.
- If you filtered a dashboard by selecting an item in a chart or table, click the same item again.
- In the Tableau Toolbar, click **Reset view** to restore your view to what you saw when you first opened the dashboard.

## Respond to a message/alert

To create a Custom View:

1. Apply all desired customizations.
2. In the **View** option in the Tableau Toolbar, click **View**.
3. In the **Custom Views** dialog box, **Name this view**, then click **Save**.
4. In the **View** option in the Tableau Toolbar, click **View** again to bring the dialog box back up. Then, under **My Views**, select the new view. (Alternatively, check **Make it my default** before clicking **Save** in step 3.)

To revert to the dashboard's original view:

1. In the **View** option in the Tableau Toolbar, click **View**.
2. Under **My Views** in the **Custom Views** dialog box, click **Original**.

## Download data

**Notes:**

- On the **TAT** and **Volumes** dashboards:
  - Before selecting an option from the **Display Data For** drop-down menu, first apply any other filters to the dashboard.
  - If the details of more than 50,000 rows are loaded, the table could take several minutes to return, and in some cases may not return.
  - To export the data, click the **Export** tab and follow instructions there.
- On the **Export** tabs of all dashboards:
  - By default, only the first 1,000 rows of data are shown in the table and may be downloaded. Using the **Load Table with a Maximum of** drop-down menu, you can instead choose to download 10,000 rows, 50,000 rows, or all data.
  - Depending on various factors such as filter selections, internet speed, or network traffic, the table may take extra time (several minutes) to load and export.

*For accounts (admins only):*

1. On the **TAT** or **VOL** dashboard only: Choose the **Display Data for** option.
2. At top right, click the **Tableau Download** icon.
3. From the drop-down menu, select **Crosstab**.
4. From the **Download Crosstab** dialog box, select the desired sheet.
5. Under **Select Format**, select **Excel**.
6. Click **Download**.

*To download data from the **Export** tab of a given dashboard:*

1. Click the **Export** tab.

   The **Export** tab for the dashboard appears.
2. At top right, click the **Tableau Download** icon and, from the drop-down menu, select the **Crosstab** option.
3. From the **Download Crosstab** dialog box, select the desired sheet.

   **Note:** Do not select any sheet with **Z** in the filename.
4. Under **Select Format**, select **Excel**.
5. Click **Download**.

*To download data from a section of a dashboard:*

1. Click in the section (not on a specific data point or bar).
2. At top right of the dashboard, click the **Tableau Download** icon.
3. From the menu, select **Data**.
4. At top right of the **View Data** window, click the **Download** icon. Download