

Activity Metrics User's Guide

Release 1.21

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Introduction

Activity Metrics, a web-based application, helps you monitor your key quality metrics activity with Mayo Clinic Laboratories.

Activity Metrics provides several dashboards that help you visualize specific data activities with Mayo Clinic Laboratories, as well as a dashboard that summarizes the others. You can filter and sort these dashboards in numerous ways, save multiple filter and sort settings for each dashboard, and export your data to various file formats. The data is collected overnight each night to ensure that users have the most up-to-date information each morning.

With Activity Metrics, you can spot trends in your data, identify underlying process gaps and ordering issues that affect your metrics, and use this information to drive continuous-improvement initiatives.

Notes:

- As a web-based application, Activity Metrics uses your browser's cache for better responsiveness. If you see an **Access Denied** or other error while using the application:
 - 1. Clear the browser cache.
 - 2. Force a refresh of the browser window by using your browser's reload key sequence (typically, **Ctrl + R** or **Ctrl + F5**).
- Activity Metrics dashboards are best viewed with a screen resolution of 1920×1080 or higher with the browser's size maximized.

Registration

For instructions on how to register on the Mayo Clinic Laboratories website (<u>MayoClinicLabs.com</u>), please see our <u>Frequently Asked Questions</u> page.

To request access to Activity Metrics, contact <u>Customer Service</u>.

Note: Supported browsers include Chrome, Edge, Firefox, and Safari.

Logging into Activity Metrics

To access the Activity Metrics functionality once you have completed registration and been assigned the correct permission:

1. On <u>MayoClinicLabs.com</u>, at top right, click **My Dashboard**.



If you have not already logged in, the login window appears.

	Welcome
	Log in to Mayo Clinic Laboratories
Prof	essional Username
Pass	word
	Log in
	Forgot username or password? Don't have an account? <u>Create one now</u> .
\subset	Mayo Clinic Employee Log in

2. Enter your Professional Username (email address) and Password.

Notes:

- Passwords are case sensitive.
- To help ensure you type your password correctly, you can click the **SHOW** link at the right end of the **Password** field. Your password becomes fully visible, and the button text changes to **HIDE**.

Password	
1P6@2NK5!K2K	HIDE

To hide your password again, click the **HIDE** link. Your password is represented again by a series of dots, and the link text reverts to **SHOW**.

Password	
	SHOW

3. Click the Log in button.

Once you have logged in, your **Dashboard** appears.

MAYO CLINI LABORATOR	ES				MayoACCESS MayoLINK	Register	My Dashboard
TEST CATALOG	c	RDERING & RESULTS	SPECIMEN HANDLING	CUSTOMER SERVICE	EDUCATION & INSIGHTS	CONTACT	SEARCH
НОМ	IE MY DA	SHBOARD					
ov		METRICS S & REPORTS	ETTINGS				

4. Click the **METRICS & REPORTS** icon.

ł
METRICS & REPORT

5. Click the Activity Metrics tab.

OVERVIEW	METRICS & REPORTS	
		Activity Metrics

Below the tab, the following appears:

Activity Metrics	
Mayo Clinic Laboratories Activity Metrics enable our health care partners to monitor key quality metrics daily. These interact provide in-depth information on canceled tests, critical callbacks, revised tests, service touchpoints, summary information, volumes.	
Launch Activity Metrics	

6. Click the Launch Activity Metrics button. Launch Activity Metrics

The Summary dashboard appears.

τ	MAYO CLINIC LABORATORIES				MayoACCESS MayoLINK	Register My Dashboar	d
	TEST CATALOG	ORDERING & RESUL	S SPECIMEN HANDLING	CUSTOMER SERVICE	EDUCATION & INSIGHTS	CONTACT SEARCH	
ACTIVITY METRICS				Summary			
) C) C C C C C View:	Original						
Summary Report		CONFIDENTIAL: This transfer of such info	eport contains Mayo Clinic confidential and mation is strictly prohibited.	privileged information that is intended	for the entity named herein. Unauthori	ized use, disclosure, copying, or	I () ?
			Summary for: Mard			tuals/Averages for Date	e Range
Health System Name	7 <u>k</u> *		A blank metric indicates no data was return		4/1/2022	End Date 3/31/2024	
		Mayo Mayo	linic Laboratories Accreditation and Licensu www.mayocliniclabs.com/customer-service	ire Information available at /guality/index.html	٨	Average	
Client Facility Account (All)	Name •	/olumes	0	rders	3,991		$\sim \sim$
		Nolum	4	l,101	~~	$\sqrt{\sqrt{v}}$	~
Selected Accounts		punq	96 T	AT MET	98-1%	~~~	\sim
		Turmarou	9	7.1%			~ ~
		Canceled Tests		Analytical Lost Prior to MCL	Lost at MCL	Mm	
		Catitical Calibacks			94.6%		
	And a second sec	rised Tests	% Revised	Tests Revised	0.25%	\wedge	\sim
		Service Rev ouchpoints Rev	c	Cases	52	2	
			2022 Q1 2022 Q2	61 2022 Q3 2022 Q4	2023 Q1 20	23 Q2 2023 Q3	2023 Q4
T MAR	O CLINIC ORATORIES	Testing	99.8% 99.1%	98.8% 97.7%		7.6% 99.2%	97.9%
						Latest Ur	odate: 05/12/2024 06:00

Functionality overview

Dashboard drop-down menu

At top right of every dashboard in Activity Metrics is a drop-down menu of dashboards. When you log in, the **Summary** dashboard appears by default.

Summary	
- Select one -	
Canceled Tests	
Critical Callbacks	
Revised Tests	
Service Touchpoints	
Summary	
Turnaround Time	
Volumes	

Tableau Toolbar

う C ウ 堤 日 ー I III View: Original

Across the top of the screen, below the words **ACTIVITY METRICS**, is the Tableau Toolbar, which offers various functionalities:

• D Undo my last action

- C Redo my last action
- D Reset view: Restores your view to what you saw when you first opened the dashboard.
- Refresh data in this view
- Pause data queries while applying actions
- **Uiew:** Allows you to set and manage Custom Views.
- **Tableau Download** icon: Allows you to download data from the dashboard in several different file formats.

For more information on views, see Managing Custom Views for an existing dashboard.

Tabs

Each dashboard except **Summary** has two tabs (right): Volumes Volumes Export

- The main (left-hand) tab visualizes your data by a particular metric and is named for that metric. Here, you can use the filters available for the dashboard to visualize certain data only. For more information, see <u>Filtering data</u>.
- The **Export** tab on the right provides a table of the data that is visualized on the main tab. Here, you can export the data to either Microsoft Excel or a CSV file. For more information, see <u>Downloading data</u>.

Icons at top right

At top right, below the Tableau Toolbar, each dashboard tab contains a selection of icons pertinent to the dashboard metric and the tab function:

- Download: Appears on the Summary dashboard, where it allows you to download a snapshot of the data visualization.
- (i) Information: Appears on all main tabs. When you hover over the icon, a tooltip that briefly explains the purpose of the dashboard appears.
- (?) Help: Appears on all main tabs. Opens <u>a page with additional information on Activity</u> <u>Metrics</u> on MayoClinicLabs.com in a new browser tab.

Information bar

Row Counts for Canceled Tests: 553

Latest Update: 04/21/2023

At the very bottom of each dashboard is a bar containing two useful indicators:

Row Counts

Row Counts (right) indicates how many rows of data appear on the main tab and how many will be exported (if you use the **Export** function).

Note: Pay attention to this number when visualizing or exporting data. Row counts exceeding 50,000 records could take <u>several minutes</u> to return results and in some cases may not return any results at all.

Latest Update

At bottom right of each dashboard is the Latest Update (below, right). This indicates when the data on the dashboard was last refreshed, assuring you that you are working with the most current and accurate information. All dashboards are updated daily.

Scrolling

In a table or graph at the bottom of a dashboard, if you cannot view all rows of data, you can scroll up and down the rows (right). If you are displaying numerous columns, you can also scroll left and right.

Call Created DT CT	Call Completed DT CT	Time Elapsed Min
11/01/2022 15:31	11/01/2022 15:39	8
11/16/2022 17:49	11/17/2022 08:47	898
11/16/2022 17:49	11/17/2022 08։47 շիդ	898
11/16/2022 17:49	11/17/2022 08:47 🔍	898
11/16/2022 17:49	11/17/2022 08:47	898

Available dashboards

Summary

ст С	LABORATORIES				MayoACCESS MayoLINK	Register My Dashboar	rd
	TEST CATALOG O	RDERING & RESU	LTS SPECIMEN HANDLING	CUSTOMER SERVICE	EDUCATION & INSIGHTS	CONTACT SEARCH	
TIVITY METRICS				Summary			
C 🗇 🛱 🛱 🗢 = 🖬 View: Origi	nal						
Summary Report		CONFIDENTIAL: Thi transfer of such inf	s report contains Mayo Clinic confidential and prmation is strictly prohibited.	privileged information that is intend	led for the entity named herein. Unauth	orized use, disclosure, copying, or	10?
			Summary for: March		and the second se	Actuals/Averages for Date	e Range
Health System Name	\vec{1}{2} ₹		E: A blank metric indicates no data was return		4/1/2022	End Date 3/31/2024	
		Mayo http:	Clinic Laboratories Accreditation and Licensu //www.mayocliniclabs.com/customer-service	re Information available at <u>quality/index.html</u>		Actual Average	
Client Facility Account Nar (All)	ne •	(olumes	0	rders	3,991		\sim
Selected Accounts		Vol	4	,101	\sim	\sim	
Selected Accounts		Time Time	96 T.	AT MET	98:196	\sim	~~
		T	9	7.1%	\sim	~	
	A CONTRACTOR OF	Canceled Tests		vnalytical Lost Prior to MCL 15 0	Lost at MCL	M	\sim
		Critical Calibacks			94.6%		
	And and a state	Revised Tests	% Revised	Tests Revise	d 0.25%		\sim
		Service Touchpoints		ases	52	\sim	\sim
	CUNIC	ency	2022 Q1 2022 Q2	2022 Q3 2022 Q	4 2023 Q1 2	2023 Q2 2023 Q3	2023 Q4
T MAYO LABOR	ATORIES	Proficiency Testing	99.8% 99.1%	98.8% 97.7%	99.5%	97.6% 99.2%	97.9%
						Latest U	pdate: 05/12/2024 06:00

The **Summary** dashboard provides an overview of the metrics measured by all other dashboards. From the **Summary for:** drop-down menu at the top, select any of the last 24 full months of data (right).



This dashboard also offers actual-versus-average comparisons of all dashboard metrics. Here, you can quickly identify trends in volumes, turnaround times, canceled tests, critical callbacks, revised tests, and service touchpoints.

Fip: Hover over a number or percentage (below, left) or a data point in a line graph (below, right) to bring up a tooltip with relevant statistics.



At the bottom of the dashboard, you can also view **Proficiency Testing** information for Mayo Clinic Laboratories for the last eight quarters.

ancy	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
Proficiency Testing	99.8%	99.1%	98.8%	97.7%	99.5%	97.6%	99.2%	97.9%

Notes:

- Unlike the other dashboards, the Summary dashboard has no Export tab. However, you can click the Download icon () (see lcons at top right) to download an image of the dashboard as a PNG file. Related data can be exported from each of the other dashboards. For more information, see Downloading data.
- When a metric value is absent, no data was returned for the selected time period.

• At the left end of the row for any dashboard, you can click the **Open in New Tab** icon 📝 to open that dashboard in a new browser tab (right).



	8											М	ayoAC	CESS		MayoL	INK	R	egister		My Da	shboar
TEST CATALOG	ORD	ERING & RE	SULTS	SPECIMEN H	ANDL	ING		CUS	STOME	ER SER	VICE		EDU	JCATIO	11 & NC	NSIGH'	TS	с	ONTACT	ä	SEA	
ACTIVITY MET	RICS							Cance	eled To	ests												~
anceled Tests Canceled Tests Export	0 *	III View: O	riginal																		(
Canceled Tests																						
Health System		Canceled	Group							Cance	llation	s for (ancele	d Gro	up: All	(Jun 1,	2022	- Jun 1	8, 202	4)		
Client Facility Account - Name	ORDER ISSUE	313 31.9	16	50			50			49			45	5	2 47	_						Aver
(All) • COVID Tests	NO GROUP SPECIFIED	209 21.3	16	40	42	39		77	33		34	43				39	42	34	42	22	34	3
(All) •	COLLECTION ISSUE	139 14.2	6	# Cancels				27						26								
(All) •	TESTING ISSUE	104 10.6		20																		
Ordered, Reflex or Add-on Test (All)	INVALID SPECIMEN CONDITION	78 8.0	16	0		2			2				77		(7) t							
Mayo Order Number	SPECIMEN QUALITY ISSUE	70 7.1	16		Jun 22	Jul 22	Aug 22	Sep 22	0ct 22	Nov 22	E2 upf Dec 22	Jan 23	EC.uely Feb 23	- udy Mar 23	Apr 23	E Z JFIF May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 2
Order Date CT 6/1/2022 6/18/2024	SPECIMEN INCIDENT	34 3.5	16	% Canceled # Cancels		1.1% 39	1.3% 50	0.9% 33	0.7% 27	0.9% 33	1.5% 49	0.9% 34	1.2% 43	1.0% 45	0.7% 26	1.1% 52	1.1% 47	1.0% 39	0.9% 42	0.8% 34	0.9% 42	0.8% 33
Performing Lab (Ail)	SYSTEM & CLIENT	33 3.4	6	# Orders	3,843	3,485	3,930	3,535	3,706	3,523	3,212	3,778	3,600	4,353	3,769	4,658	4,401	3,747	4,595	4,297	4,482	4,219
Cancell	lations					Can	celed F	Reason											N	layo Te	est IDs	
Other type Pre-Analytical		588 377	Free Text Comm	ent						209					QFT4 ZMMLS	91 S 41						
Specimen Handling		14	Specimen was in	properly collected						96					HCVG	34						

Canceled Tests

The **Canceled Tests** dashboard visualizes your monthly volumes of tests that were canceled by either your organization or by Mayo Clinic Laboratories. The default time range is the last 24 full months; to display more information, use the **Order Date CT** (date selector) filter to select a range over the past 24 rolling months. You can filter the data in several additional ways, including by specific Test IDs and by values from the color-coded **Canceled Group** legend.

The dashboard indicates the **Average Canceled** both at top right of the main **Cancellations** bar graph and at the bottom of the screen. Below the main graph are tables of **Cancellations** and **Canceled Reason** data, as well as a small horizontal bar graph of **Mayo Test IDs**.

Tip: Hover over a colored square in the **Canceled Group** legend (below, top) or a colored bar segment in the main **Cancellations** graph (below, bottom left) to bring up a tooltip showing the cancellation reason and other information. Hover over a bar in the **Mayo Test IDs** graph below the main graph (below, bottom right) to bring up a tooltip showing the **Test ID**, **Test Name**, and number of tests within the specified date range.



Cancel counts

Cancellations are counted at the Mayo Test ID level and determined by the number of unique Cancellation Comments. Test order hierarchy dictates that one order can have multiple tests and one test can have multiple components.

If a Mayo Test ID with multiple components is canceled, the count is equal to the number of unique Cancellation Comments. For example:

- If an order has two tests and both are canceled, the count is 2.
- If an order has a profile test and one component on that profile is canceled, the count is 1.
- If one order has a profile test and two components of that test are individually canceled with different comments, the count is 2.

If the Mayo Test ID has components that were both reported and canceled, the order appears on both the **Canceled Tests** and **Turnaround Time** dashboards.

Critical Callbacks

		ORATORIES											Ma	yoACCESS	May	oLINK	Rej	gister	My Dash	board			
	TEST CA	ATALOG	ORDER	ING & RE	ESULTS		PECIME	N HANDLIN	G	СЦ	ISTOMER	SERVICE		EDUCATI	ON & INSIG	HTS	coi	NTACT	SEARC) ж			
ACTIVITY METR	RICS									Critica	l Callbad	ks											~
Critical Callbacks Critical Callba		iew: Original																					₽.
Critical Callbacks																						(i)	0
Health System	، ۲							% Cal	lbacks	Meeti	ng Crit	eria (Jur	n 1, 202	22 - Jun 2	20, 2024)							
Client Facility Account - Name (Ail)	-	100.0% _ 80.0%	100.	0%	100.0%100	0%		100.0%10	0.0%	-100.0%		100.05	100.0	195	80.0%	/	100.0%100	0.0% 100.0	96 100.	2% 100.0	% 100.09	6 1 0	00.096
Mayo Test ID - Name (All)		60.0% 40.0% 20.0%					66.7%							50	0.0%								
Mayo Order Number		0.0% -	Jun	ul 22	ug	dag	0ct	ov 22	Dec	Jan	Feb	ar 23	Apr	May 23	Jun Jul 23		- 20	Sep Oct	ov 23	Dec	Jan	Feb	
Callback Created Date CT 6/1/2022	6/20/2024			7				2				7							2				
Requesting Physician												allback S											
(IIA)	٠	Callbacks Requested	Jun 22	Jul 22 3	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23 2	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	0ct 23	Nov 23	Dec 23	Jan 24	Fi .
Performing Lab	•	Total Calls		8	3	1	4	1	1	3			2	4	10	9	4	9	4	1	5	5	
Callback Criteria Met		Avg # of Calls		2.7	1.0	1.0	1.3	1.0	1.0	1.5	0.0	0.0	1.0	1.3	2.5	1.8	1.0	2.3	1.0	1.0	1.7	1.0	
(AII)	*																						
								Critica	al Call	back De	atails												
Client Facility Account Name 7 - 7 - 7 - 7	MayoOrd M M M		Order Numb	F	GEN	Fungal Cult Fungal Cult	ure, 06 ure, 06	der DT CT /27/2023 12:1 /27/2023 12:1 /27/2023 12:1	B 07/0 B 07/0	Created DT (3/2023 14:0 3/2023 14:0 3/2023 14:0	14 14	Call Complet 07/03/2023 07/03/2023 07/03/2023	16:34 16:34	Time 150 150 150	Elapsed Min	Total C 3 3 3	Calls Per MC MC	сь.	Attemp	t 1 : Long ri t 2: Long rin	ng, no ans , n g, no ans, no a results to:		
Row counts for Critical Calibacks: 7	18 of 78																			Late	st Update:	06/20/202	4 01 59

The **Critical Callbacks** dashboard visualizes the number of critical callbacks made by Mayo Clinic Laboratories. The default time range is the last 24 full months; to display more information, use the **Callback Created Date CT** (date selector) filter to select a range over the past 24 rolling months. The **% Callbacks Meeting Criteria** line graph displays the monthly percentage of callbacks completed within 60 minutes of the callback request. Callback details include Test ID, duration of call, call completion time and date, time elapsed, and other information.

Note: Only critical test results are included on this dashboard. Other result types, such as semiurgent, are not displayed.

Tip: Hover over the average line in the main graph to bring up a tooltip with the average percentage of critical callbacks meeting the callback criteria for the specified timeframe (right).

100.0%	100.0%	100.0%
	02 204	100.0%
83.3	% Average = 93.9%	

Below the line graph are the **Critical Callback Summary** and all **Critical Callback Details** data in tabular form. You can use this data to monitor Mayo Clinic Laboratories critical-callback performance.

Fip: Hover over a data point in the **% Callbacks Meeting Criteria** line graph (below, left) or a cell in the **Critical Callback Summary** table (below, right) to bring up a tooltip with relevant statistics.

90.1%	88.3%	92.0%
Call	back Month - Y backs Request all Time Met:	

Mar 24	Apr 24	May 24	
696	700	299	
1,000	000		
		n - Year: Mai ested: 696	

Revised Tests



The **Revised Tests** dashboard visualizes tests that have been revised and resulted. The default time range is the last 24 full months; to display more information, use the **Result Revision Date CT** (date <u>selector) filter</u> to select a range over the past 24 rolling months. The **% Tests Revised** line graph displays the monthly percentage of tests that have been revised.

Tip: Hover over the average line in the main graph to bring up a tooltip with the average percentage of tests revised during the specified **Result Revision Date** timeframe (right).

	1º	0 13%	09%	/
0.03%	0.05%	Average = 0.25%	0570	0.11%
Feb 23	Mar 23	Apr 23	May 23	Jun 23

Below the line graph is the **Revised Tests Summary** table, which shows the percentage of tests revised, the number of tests revised, and the number of tests resulted per month. At bottom is the

Revised Tests Details table, which shows the details of each revised test, including its <u>Revision</u> <u>Status</u>.

The right side of the dashboard features the **Test IDs by # Revised** and (if applicable to your organization) **Client Accounts by # Revised** bar charts.

Note: Demographic-only revisions that do not affect reference ranges, such as name, are not included in this dashboard.

Revision Status

In addition to appearing in the **Revised Tests Details** table on the main tab, the **Revision Status** column is also displayed on the **Revised Tests Export** tab. Possible values are as follows:

- Revised: Result was revised after report was initially verified.
- Revised to Canceled: Result was canceled after initial report was verified.
- Revised Prior to Final: Result was revised prior to all results of the report being verified.
- Revised at Final: Result was revised at the time of the final result of the report being verified.

💡 Tips:

 Hover over the Information icon ① above the Revision Status column to bring up a tooltip with the above information (right).

Revised Tests Details: Revision Status Column
The Revision Status column provides more information about how the test report was revised. The possible values are listed below:
Revised - Result was revised after the report was initially verified.
Revised to Canceled – Result was canceled after the initial report was verified.
Revised Prior to Final – Result was revised prior to all results of the report being verified.
Revised at Final – Result was revised at the time the final result of the report was being verified.
(i) Client Accounts by # Revised
Result Revision DT CT Revision Status

• Hover over a data point, bar, or table cell to bring up a tooltip with relevant statistics:



% Tests Revised

Jan 24 Feb 24 Mar 24 Apr 24 May 2 0 22% 0 1 4 9 0 15% 0 15% 0 16% 5 1,75 Month of Result Revision: Jan 24 % Tests Revised. 0.22% 315,4



Test IDs by # Revised

Revised Tests Summary table



Client Accounts by # Revised

Note: This does not apply to the **Revised Tests Details** table.

Service Touchpoints



The **Service Touchpoints** dashboard visualizes the total numbers of case inquiries that required additional resolution and organizes them by primary and secondary reasons for contact. The default time range is the last 24 full months; to display more information, use the <u>Creation Date CT (date</u> <u>selector) filter</u> to select a range over the past 24 rolling months. You can filter data based on any or all primary reason and secondary reason codes.

Tips:

 Hover over the average line in the main graph to bring up a tooltip with the average number of case inquiries that required additional resolution during the specified timeframe (right).



 Hover over a colored square in the Primary Reason legend (below, top), a colored bar segment in the Service Touchpoints By Primary Reason Code bar graph (below, bottom left), or a cell in the Summary by Primary/Secondary Reason table (below, bottom right) to bring up a tooltip with the Primary Reason Code and other details.



Note: If specimens are not received at Mayo Clinic Laboratories within 48 hours of batching (or, if applicable, transmission via interface), they may become service touchpoints for which the **Primary Reason** is **Specimen Pending Arrival**.

Turnaround Time

	HAYO CLINIC LABORATORIES				MayoACCESS MayoLINK	Register	My Dashboard		
	TEST CATALOG	ORDERING & RESULTS	SPECIMEN HANDLING	CUSTOMER SERVICE	EDUCATION & INSIGHTS	CONTACT	SEARCH		
ACTIVITY METRICS				Turnaround Time					~
Turnaround Time	Uiew: Original								.
Turnaround Time									00
Health System 12 +	100 0% 96 4% 94 5% 94.6% 92 59 80 0%		Meeting TAT Target (Jun 1, 2022 -	lun 17. 2024) 19 96.5% 95.8% 96.9% 96.5% 96.0%	98.5% 97.9% 97.2% 95.4% 94.9%	25HD PATH	Test ID # Order N 661 IC 365	ers Beyond TAT Target	
Client Facility Account - Name [(All) * COVID Tests	10 00% 10 00% 40.0%					C272 KIDS DHVI FLCS ZMM	9 230 T 230 D 73 68	F	
(Air) •	20.0% 0.0% E 22 2 2 3	Oct 22 Nov 22 Dec 22 Jan 23 Feb 23	Mar 23 Apr 23 May 23 Jun 23 Jun 23	Aug. 5ep. 0ct 23 23 Dec 23	Jan 24 Feb 24 Mar 24 Apr 24 May 24	PLP LCMS 47 DEXT	57 5 50 A 43 7 41		
(Ail) • Ordered, Reflex or Add-on Test (Ail) •	If the details of more	ng an option from the "Display Data Fo than 50,000 rows are loaded, the tab	le could take <u>several minutes</u> to retur			SPNE PHEP AMPI CRHE FXS HPCL	2 36 HU 35 28 28 77 27		
Mayo Order Number	lo export the data, c	lick the "Export" tab and follow the in	structions there.			DSM: MMA CHRE	iš 25		=
Order Date CT 6/1/2022 6/18/2024									
Display Data For ((tona) *									
Row counts for Turnaround Time Summary: 1,24	6 Orders Beyond TAT Target 3,686 Turnaroun	1 Time Details: 1,000 of 96,688						Latest Upc	late: 06/17/2024 01 3

The **Turnaround Time** (TAT) dashboard tracks time elapsed between specimen receipt at Mayo Clinic Laboratories and result reporting. The default time range is the last 24 full months; to display more information, use the **Order Date CT** (date selector) filter to select a range over the past 24 rolling months.

The main % Orders Meeting TAT Target line graph visualizes the percentage of tests meeting the **Published Report Available** time. The **Published Report Available** time is also known as the **TAT** Target (number of days) listed in the test catalog; orders exceeding this value are visualized in the **Orders Beyond TAT Target** bar chart. This data allows you to monitor Mayo Clinic Laboratories testing volumes and TAT performance.

Ϋ Tips:

 Hover over the average line in the main graph to bring up a tooltip with the average percentage of orders meeting the **Published Report Available** time during the specified timeframe (right).



• Hover over a data point in the line graph (below, left) or a bar in the **Orders Beyond TAT Target** bar chart (below, right) to bring up a tooltip with relevant statistics.

-				
96.9%	95.9%	96.3%	95.5%	97.9%
	Month o % TAT N # Order	let:	-	lan 24 96.9% 327,952



Notes:

- If a test is added on after specimen receipt, TAT calculation starts from the date and time the add-on test was ordered. Add-on testing can start when the specimen becomes available.
- TAT for a reflex testing starts from the date and time the reflex was added on to the ordered test.
- To calculate the percentage of tests meeting Published Report Available time, a target time for each test is set by the performing lab and maintained in the Test Catalog under the Report Available field. Target TAT is determined by the maximum days shown in the Published Report Available field.
- Mayo Clinic Laboratories includes data for activity that can be more closely monitored and controlled. Therefore, the **Turnaround Time** dashboard does not include:
 - o Transit time.
 - Referral or miscellaneous (ZW code) testing. Mayo Clinic Laboratories cannot control other reference labs' TAT. In addition, many miscellaneous ZW codes are published with generic TATs because each code can be used for a variety of tests at one laboratory. These variable TAT targets would inaccurately skew Mayo Clinic Laboratories' data and therefore have been excluded from Activity Metrics.

Volumes



The **Volumes** dashboard visualizes the number of tests ordered as a line graph, sorted by dates of order creation. The default time range is the last 24 full months; to display more information, use the **Order Date CT** (date selector) filter to select a range over the past 24 rolling months. This dashboard also presents **Mayo Test IDs** and **Client Accounts By # Orders** data as bar graphs. You can use this data to monitor Mayo Clinic Laboratories testing volumes.

Tips:

• Hover over the average line in the main **Volumes** line graph to bring up a tooltip with the average number of tests ordered during the specified timeframe (right).



 Hover over a data point in the Volumes graph (below, left), a bar in the Mayo Test IDs bar graph (below, right), or a bar in the Client Accounts By # Orders bar graph (top of next page) to bring up a tooltip with various details.





Client Accoun	ts By # Orde	ers			
Client Account	# Orders =	N			
Client Account Number: Client Facility Account Nam	ne:	43	-	-	
# Orders:	27,794				

Volume counts

Volumes are counted by individual test code, not by component or client order. For example, if one order contains the PAVAL (profile) and ACE tests, the dashboard displays a volume of 2.

Test codes for reflex and add-on tests are counted along with all other test codes and noted as such in the data summary. Canceled tests are also included as ordered test codes in the count but not separately identified as canceled.

Filtering data

All dashboards provide multiple means of filtering your data.

Note: When you exit from a dashboard, your filtering choices are not preserved. To save a set of filters for later use, follow the instructions in <u>Managing Custom Views for an existing dashboard</u>.

Drop-down menu filters

On the left side of all dashboards are various filters in the form of drop-down menus. The **Summary** dashboard has two such menus: **Health System** and **Client Facility Account – Name** (see details below).

From some of these menus, you can select one option only, while on others you can check one or more check boxes. After making your selection, click the **Apply** button (below, left) at the bottom of the menu, and then click elsewhere to close the menu. To cancel your selection, <u>Cancel Apply</u> click the **Cancel** button (far right).

Many drop-down menu filters do not appear on all dashboards. The following section notes when a filter is available on certain dashboards only (with the exception of **Summary**).

Health System

What you can view in the **Health System** filter depends on your access level and permissions. If your organization is part of a health system and you have access to other accounts in that system, you can view data for one or more of the sites using this filter.

Health System	
(AII)	•
(AII)	
✓ (Not Specified)	

Client Facility Account - Name

The **Client Facility Account - Name** filter is also restricted by access levels and permissions. If your organization has multiple sites and you have access to them, you can view data for one or more of those sites using this filter. Select a site from the drop-down menu or enter the account number or first several characters of a site name into the text field.

Note: On the **Summary** dashboard, your selections in the **Client Facility Account - Name** filter are displayed in the **Selected Accounts** list below.

COVID Tests

The **COVID Tests** filter allows you to view only data for COVID-19 tests or all data except for COVID test data. You can include or exclude all SARS Test IDs, including PCR and serology-based tests.

This filter appears only on the **Canceled Tests**, **Revised Tests**, **Turnaround Time**, and **Volumes** dashboards.

Mayo Test ID Name

You can use the **Mayo Test ID Name** filter to view data for one or more test codes listed in the <u>Mayo Clinic Laboratories Test Catalog</u>. The screenshot to the right presents only a very small selection of tests available.

This filter appears on all dashboards except Service Touchpoints.

ZW Referral Test ID Name

Use the **ZW Referral Test ID Name** filter to view data based on miscellaneous Referral Test IDs. By default, the filter displays all tests, referral and non-referral. Deselect the **(All Other Test IDs (non-ZW))** option to view data for referral (ZW) tests only.

You can select one or more specific ZW referral tests to view data for those individual tests.

This filter appears only on the Volumes dashboard.

	ity Account - Name	
(AII)	•	80.0%
✓ (AII)		
	- 700 -	
\checkmark	- 702 - Labora	atory
\checkmark	- 700	
\checkmark	- 702	
\checkmark	- 704 -	
	- 704 - Laboratory	
~	- 702 - Lab	
~	- 700 -	
~	702 - Laboratory	
~	- 702 - Laboratory	
\checkmark	- 700 -	
	- 701 -	
\checkmark	- 702 -	

- 701 - Lah Manage



Мау	o Test ID - Name
(All) 🔹
I	
\checkmark	(AII)
\checkmark	AATHR-Thrombophilia Prof
\checkmark	ACARP-Acanthamoeba species Detection, PCR
\checkmark	ACMA-Acetaminophen, S
\checkmark	ADIC-DIC/ICF Prof
\checkmark	ALBLD-Bleeding Diath Prof, Limited
\checkmark	ALUPP-Lupus Anticoagulant Prof
\checkmark	AMTRP-Amitriptyline and Nortriptyline, S
\checkmark	APROL-Prolonged Clot Time Prof
\checkmark	APTTP-Activated Partial Thrombopl Time, P
\checkmark	B-Bacteria/Candida Culture, Blood
\checkmark	BABPB-Babesia species PCR, B
\checkmark	BARTB-Bartonella PCR, B
\checkmark	BMAMP-Basic Metabolic Panel, P
\checkmark	BMIYB-Borrelia miyamotoi Detection PCR, B
V	BOAC-Boron

ZW Referral Test ID Name	
(AII) •	
✓ (AII)	
✓ (All Other Test IDs (non-ZW))	
ZW1 - ISA - ISAVUCONAZOLE SUSCEPTIB	ILITY TESTING
ZW1 - ITRA - ITRACONAZOLE	
ZW1 - MICA - MICAFUNGIN SUSCEPTIBIL	ITY TESTING
✓ ZW1 - Not Provided - Not Provided	
ZW2 - ISA - ISAVUCONAZOLE	
ZW2 - ISA - ISAVUCONAZOLE SUSCEPTIB	ILITY TESTING
✓ ZW2 - Not Provided - Not Provided	
✓ ZW3 - Not Provided - Not Provided	
✓ ZW59 - 500850 - T3 Uptake	
ZW59 - 520134 - Anti-Fodrin Antibodies,	IgG & IgA
ZW69 - 1760 - Fungitell Titer, BAL, Brond	h Wash or CSF, Obsolete 12/2022
V 7W90 19976 Pagzadiazoning Confirm	tion Outetitative corum or placma

Ordered, Reflex or Add-on Test

The **Ordered**, **Reflex or Add-on Test** filter allows you to specify the type(s) of test you want to view data for.

This filter appears only on the **Canceled Tests**, **Revised Tests**, **Turnaround Time**, and **Volumes** dashboards.

Mayo Order Number

Use the **Mayo Order Number** filter to view data for a particular Mayo order number or range thereof, or to view data from which certain order numbers have been excluded.

This filter appears on all dashboards except Volumes.

Date selector

This filter, which is named differently on different dashboards, allows you to view orders placed, callbacks made, or calls and fax inquiries made within a range of dates. Either click each of the start and end date fields and then enter the date manually, or find and select the desired date in the pop-up calendar (right).

Dashboard-specific name of date selector filter	Dashboard(s)	Allows you to view within the selected range
Order Date CT	Canceled Tests, Turnaround Time, Volumes	Orders placed
Callback Created Date CT	Critical Callbacks	Callbacks made
Result Revision Date CT	Revised Tests	Tests revised
Creation Date CT	Service Touchpoints	Calls and fax inquiries made

Requesting Physician

The **Requesting Physician** filter allows you to filter tests by the physician(s) who requested them.

This filter appears only on the **Critical Callbacks** and **Volumes** dashboards.

Requesting Physician	1
✓ (AII)	
✓ A	
✓ A	
✓ A	
A	
✓ A	
A	
A	
A	
A	
A	
A	
A	
A	
✓ A	
A	
✓ A	

✓ A

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Ordered, Reflex or Add-or	n Test
(AII)	•
✓ (AII)	
✓ Add-on Test	
✓ Original Ordered Tes	t
✓ Reflexed Test	
Cancel	Apply

•	
~	Include Values
	Exclude Values

Order Dat	3/1/	202	3	4	/16/	2024	4
	< March 2023 >		>				
Berformin	S	М	т	w	т	F	S
Performin	26	27	28	1	2	3	4
	5	6	7	8	9	10	11
	12	13	14	15	16	17	18
	19	20	21	22	23	24	25
	26	27	28	29	30	31	1
	Today: 4/16/2024						

Callback Criteria Met

The **Callback Criteria Met** filter allows you to view callback data based on whether callbacks met the required criteria.

This filter appears only on the Critical Callbacks dashboard.

Method

Filter your calls and fax inquiries by whether they happened via Mayo Clinic Laboratories Message Center, by another communication method, or by all methods.

This filter appears only on the **Service Touchpoints** dashboard.

Primary Reason Code / Secondary Reason Code

Using these two filters, you can sort calls and fax inquiries by primary and secondary reason codes. These reason codes are used internally by Mayo Clinic Laboratories to identify missing order information, sample issues, delays, and other inquiries.

These filters appear only on the **Service Touchpoints** dashboard.

Performing Lab

Use the **Performing Lab** filter to view tests performed by Mayo Clinic Laboratories, tests performed by other laboratories, or all performing labs.

This filter appears only on the **Canceled Tests**, **Revised Tests**, **Critical Callbacks**, and **Volumes** dashboards.

Display Data for

On either tab of the **Turnaround Time** dashboard, filter your data by **Turnaround Time Summary**, **Orders Beyond TAT Target**, or **Turnaround Time Details**. On either tab of the **Volumes** dashboard, filter your data by **Volume Details**.

Note: See <u>Row Counts</u> for precautions on loading or exporting numerous rows of data at one time.

Callback Criteria Met	
(AII)	•
(AII)	
Met	
Not Met	

Method	
(AII)	•
(AII)	
Message Center	
Other	
(AII)	•



Performing Lab	
(AII)	•
(AII)	
MCL	
Non-MCL	
N 7	

(None)	
(None)	
Turnaround Time Summary	
Orders Beyond TAT Target	
Turnaround Time Details	

Display Data For	
(None)	-
(None)	
Volume Details	

Drilling down or up on the data visualization

On any dashboard that visualizes data by date (monthly), you can drill down to a weekly or daily view, or drill up to a quarterly or yearly one. This helps you more easily recognize trends, such as ordering patterns by quarter and staffing needs by day, and spot actionable elements in your interactions with Mayo Clinic Laboratories.

Drilling down or up on graphs

To drill down to a weekly or daily view on a graph:

1. Narrow your date range using the <u>date selector</u>.

Note: If you drill down beyond weekly view while viewing an overly broad time range, the date labels on the graph's *x*-axis will not be legible.

2. Hover over the bottom left corner of the graph to the left of the *x*-axis (where the date labels are shown) until the drill icons, a minus sign \square and a plus sign \square , appear.



3. Click the plus sign icon once to change the display to weekly view.



4. Click the plus sign icon again to change the display to daily view.



To drill up to a quarterly or yearly view on a graph:

- 1. Adjust the date range as needed using the <u>date selector</u>.
- 2. Hover over the bottom left corner of the graph to the left of the *x*-axis until the minus and plus sign icons appear.
- 3. Click the minus sign icon once to change the display to quarterly view.



4. Click the minus sign icon again to change the display to yearly view.



Filtering data

Drilling down or up on tables

Drilling down and up works the same way on a table organized by date as it does for a graph organized by date. The only difference is that you hover over the top left corner of the table, to the left of the date headers (right).

Û	+.ug 22
% Canceled	1.3%
# Cancels	50
# Orders	3 0 3 0

	August 28,	September	September	September	September
% Canceled	100.0%	100.0%	0.0%	0.0%	0.0%
# Cancels	1	1	0	0	0
# Orders	1	1			

Table drilled down to weekly

	2022 Q3	2022 Q4	2023 Q1	20
% Canceled	2.5%	2.3%	2.1%	1
# Cancels	44,346	54,092	52,238	45
# Orders	1,741,622	2,351,063	2,520,101	2,54

Table drilled up to quarterly

	May 19, 2024	May 20, 2024	May 21, 2024	May 22, 2024
% Canceled	0.0%	0.6%	1.9%	0.6%
# Cancels	0	1	5	1
# Orders	1	181	265	171

Table drilled down to daily

	2022	2023	2024
% Canceled	2.4%	1.8%	1.6%
# Cancels	98,438	186,437	112,678
# Orders	4,092,685	10,087,400	6,940,926

Table drilled up to yearly

Note: Once you have drilled up or down on a graph beyond monthly view, you will no longer be able to filter the data further by clicking on a bar or line in the graph representing a different date. However, all other filtering options outside the graph will still function.

Filtering data by clicking in the main graph

On dashboards whose main graphs are bar charts, if you click a colored segment of a bar, the graph is filtered by the criteria represented by the segment's color and by the entire bar.

In the screenshot below of the **Service Touchpoints** dashboard, in the **Service Touchpoints By Primary Reason Code** bar graph, the user has clicked the large purple bar segment for November 2023. Purple represents the **Primary Reason Code** of **Verification/Info Needed**. Data shown in the table below the bar graph is for November 2023 service touchpoints with that primary reason. In addition, the **Primary Reason** legend reflects only **Verification/Info Needed**.



In the screenshot below, on the **% Orders Meeting TAT Target** line graph on the **Turnaround Time** dashboard, the data point for July 2023 is selected. This filters the data shown in the **Orders Beyond TAT Target** bar graph to the right.

10	0.0%	-	_	-		_							-		-	un 18, 2				-	00.5%		-	_	_	-		Orders E	Beyond TAT Target
		96.4%	94.5%	94.6%	92.5%	94.7%	94.9%	94.8%	96.7%	95.89	97.2%	97.0%	95.6%	98.0%	97.6%	96.5%	95.6%	96.9%	96.5%	96.0%	98.5%	97.9%	97.2%	95.4%	94.9%	98.1%	Mayo Test ID	# Orders	
8	0.0%																										TGRP	12	
																											C2729	11	
ċ	0.096																										PATHC	5	
																											DHVD	4	
4	0.096																										25HDN	3	
																											MPNR	3	· · · · · · · · · · · · · · · · · · ·
	0.0%																										SPNEU	3	
	0.096																										TDP	3	and the second se
	0.010	N	CN.			N	≥ 01	N	2	3	1 m	3	> m	3	0			m	> m	m	4	4	74	4	> 4	4	AATHR	2	
		un 22	n 2	and	Geb	t	No	90	an 2	60	Na Na	pr	Ma 2	un	c In	ĝny	deb	t	No No	GC	LIB .	ep	N N	pr	Ma 2	un 24	CYSPR	2	
		2	_	~				-	2	LL.		<		-	7			0		-	-	LL.		<		-	DEXT	2	
																											MGMR	Z	
																											MYEFL	2	
		1	lote: Bel	ore sel	ecting a	in optio	n from t	the "Dis	play Da	ta For	dropdo	vn, firs	t apply	any oth	er filter	s to this	dashb	oard.									ZMMLS	2	
	\mathbf{N}						~~																				ALDS	1	
)		the det	ails of i	nore th	an 50,0	00 rows	s are loa	ided, th	etable	could ta	ke <u>sev</u> i	eral mini	<u>ites</u> to	eturn,	and in so	ome cas	ses may	not ret	turn.							AMPHU	1	
		1	o export	the da	ta. click	the "E	coort" ti	ab and f	ollowt	heinst	uctions	there.															ANCA	1	
																											ANST	1	
																											ASO		

On the **Critical Callbacks** dashboard as seen below, the May 2023 data point in the **% Callbacks Meeting Criteria** line graph has been selected. The **Critical Callback Summary** table highlights the

9/26/24

column for that month, and the **Critical Callback Details** table is filtered to reflect only details for callbacks during that month.

Critical Callbacks														() ()
Health System					% Cal	lbacks Meeti	ng Criter	ia (Jun 1, 20	22 - Jun 20,	2024)				
Client Facility Account - Name (All)	100.0% 80.0% 60.0%	100.0	100.0%1	00.0% 66.	100.0%10	• • 100.0% 0.0%)	100.0%* 100.	.096	80.0%	0.0%100.0% 100.0	0% 100.0%	100.0% 100.0	° 100.09
Mayo Test ID - Name (All)	40.0%								50.0%					
Mayo Order Number	0.0%	. un	Jul 22 Åug	Sep :	4ov 22	Dec Jan	Feb	Apr	May 23 Jun	Jul 23 Aug.:	Sep Oct	Vov 23	Dec	Feb
Callback Created Date CT 6/1/2022 6/20/2024						Cri	itical Call	lback Summa	ary					
Requesting Physician (All)		Jun 22	Jul 22 Aug 22	Sep 22	Oct 22 Nov 22	Dec 22 Jan 23	Feb 23	Mar 23 Apr 23	3 May 23 Ju	in 23 Jul 23	Aug 23 Sep 23	Oct 23 No	/ 23 Dec 23	Jan 24 Fe
Performing Lab	Callbacks Requester	d							з					
MCL *	Total Calls								4					
Callback Criteria Met	Avg # of Calls								1.3					
					Critica	l Callback De	atails							
Client Facility Account Name Mayo Or	rder Number Clien	t Order Number	Mayo Test I	D Mayo Test Nan	e Order DT CT	Call Created DT C	CT Ca	II Completed DT CT	Time Elap	sed Min Total Ca	lls Performing Lab	Call Details		
7 M	23AF	HM-137X0061	FGEN	Fungal Culture	05/18/2023 07:04	05/24/202311:5	56 05	5/24/2023 12:01	5	1	MCL	Verbal Repeat	, Gave results to:	
7 M 7 M		HM-137X0054,1 HM-137X0054,1	CSFME CSFME		e 05/18/2023 08:3 e 05/18/2023 08:3			5/19/2023 11:10 5/19/2023 11:10	48 48	2 2	MCL MCL	Attempt 1 :	to call back 5/ , Gave results to:	19@1:24
Row counts for Critical Callbacks: 4 of 4													Latest Update	: 06/20/2024 03

To remove the filter, click the same item again.

Filtering data by clicking in a legend

Clicking on a square in a legend filters the main graph by the criterion the square represents. The screenshot below shows the main **Service Touchpoints by Primary Reason Code** bar graph of the **Service Touchpoints** dashboard filtered by a selection from the **Primary Reason** legend (**Verification/Info Needed**).



On some dashboards, such as **Canceled Tests** below, selecting a square in the legend also filters the tables below the main graph.



To remove the filter, click the same item again.

Filtering data by clicking in a table or secondary graph

You can narrow down the data displayed in the main graph of a dashboard by clicking on a cell or row of a table or by clicking on a bar in a smaller bar graph. For example, below is a view of the **Service Touchpoints** dashboard filtered by **Primary Reason Code** (**Verification/Info Needed**).





Here, the same dashboard is also filtered by Secondary Reason Code (Name).

In this screenshot, the **Service Touchpoints** dashboard is filtered by the selection of a particular month (September 2023) in the **Summary by Primary/Secondary Reason Codes** table.



On the **Turnaround Time** dashboard, you can filter the **% Orders Meeting TAT Target** line graph by clicking the bar of a Test ID in the **Orders Beyond TAT Target** bar graph. In the screenshot below, the

main graph is filtered by orders for the **KIDST** (Kidney Stone Analysis) test that exceeded the TAT target.



You can also combine these filters. In the image below of the **Canceled Tests** dashboard, the **Cancellations** bar graph is filtered by selections in the **Canceled Reason** table (**Free Text Comment**) and **Mayo Test ID** table (**ZMMLS:** Antimicrobial Susceptibility, Aerobic Bacteria, Varies).



Table selections can also affect data shown in other tables. For example, on the **Critical Callbacks** dashboard, if you select a column in the **Critical Callback Summary** table, the **Critical Callback Details** table is filtered by the criterion of that column (note that the main graph is not affected).

		Critical Callback Summary																					
Requesting Physician (All)	•		Jun	22 Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Fe
		Total Calls															4						
Performing Lab MCL	•	Avg # of Calls															1.0						
Callback Criteria Met		Median Call Time Elapsed (Min)	e														7.0						
met																							
								Critic	al Callt	oack De	tails												
ne Mayo Order Numb	er Client			D Mayo Test Na				ited DT CT		Completed I			apsed Min	Total Call:		ming Lab	Call Details						-
M M			CARFT PBDV	Carbamazepir Lead, Venous,				02314:10 02310:03		31/2023 14:1 02/2023 10:0		9 4		1	MCL MCL		Verbal Rep Verbal Rep				(Carb	smazep	
M			LENT	Enterovirus P	CR 08/14/	2023 06:58	08/16/20	02321:32	08/	16/2023 21:3	37	5		1	MCL		Verbal Rep	eat, Gave re	sults to:				

If you click a cell in the Critical Callback Summary table, such as the number of Callbacks Requested in September 2023, the Critical Callback Details table reflects only details for callbacks requested during that month.

	20/2024									Crit	ical Cal	lback Si	ummar	v									
questing Physician			Jun 22	Jul 22	Aug 22	Sep 22	Oct 22	Nov 22	Dec 22	Jan 23	Feb 23	Mar 23	Apr 23	May 23	Jun 23	Jul 23	Aug 23	Sep 23	Oct 23	Nov 23	Dec 23	Jan 24	Fe
ai)		Callbacks Requeste	ed																				
rforming Lab CL	•	Total Calls																9					
llback Criteria Met let	•	Avg # of Calls																					
								Critic	al Callb	ack Det	ails												
Mayo Order Number	Client Orde	er Number Ma	ayo Test ID	Mayo Test Nam	e Order D	T.CT	Call Create	d DT CT	Call	ompleted E	т ст	Time Ela	psed Min	Total Calls	Perform	ing Lab	Call Details					can o	
M		LC	MAL I	Malaria PCR	09/08/2	023 07:09	09/11/202	3 16:49	09/1	L/2023 17:3	7	48		2	MCL		Verbal Rep	eat, Gave re	sults to:	9/11 1	L7:36		
M		H	BAG	Histoplasma/B	la 09/25/2	02307:05	09/28/202	313:43	09/21	3/2023 14:1	D	27		з	MCL		Attempt 1	1:5 Left vn	n to 9/28	FL			
M		H	BAG I	Histoplasma/B	- 09/26/2	022.07-05	09/28/202	313:43	09/2	3/2023 14:1	n	27		3	MCL								

To remove the filter, click the same item again.

Clearing filters

To clear a filter so that all values are visible again:

If the filter was set using a drop-down menu, click the Cancel ٠ **Filter** icon 🔀 at top right of the menu (right).

ACE - Angiotensin Converting Enzy 🔻	Mayo Test ID Name 🛛 🕅	•
ACE - Angiotensin Converting Enzy 🔻		
	ACE - Angiotensin Converting Enzy	•

(AII)

Mayo Test ID Name

•

The **Filter** icon represent the place (right), indicating that the menu is now unfiltered.

If the drop-down menu you used to set the filter has check boxes, you can select the (AII) check box at the top to select all check boxes, which clears the filter.

- If you filtered a dashboard by selecting a square in a legend; a segment in a bar chart; a point on a line graph; or a table cell, row, or column, click the same item again to clear the filter.
- As discussed under Tableau Toolbar, you can also click the Reset view icon 🖄 to restore your ٠ view to what you saw when you first opened the dashboard.

Managing Custom Views for an existing dashboard

When you apply filters or otherwise customize your view of a dashboard for a specific business scenario, you can save the modified view as a Custom View for future use. You can create and save multiple Custom Views of one dashboard.

Creating a Custom View

Depending on your access level and permissions, you can create a Custom View by <u>first</u> applying all customizations (such as filters) required for the use case, and <u>then</u> following these steps:



1. At top left, in the Tableau Toolbar, click the **View** option (right).

The **Custom Views** dialog box appears.

- 2. In the **Save Custom View** section, enter a name for the view in the **Name this view** text field (right).
- 3. At bottom right of the **Save Custom View** section, click the **Save** button.

The **Custom Views** dialog box closes.

Custom Views	2
Save Custom View	
Name this view 2	
Collection issue QFT4	×
Make it my default	
	3 Save
My Views	
✓ Collection issue QFT4	
Other Views	
II Original (default)	Hidden User
	Manage Views $ ightarrow$

- 4. Click the **View** option in the Tableau Toolbar again to bring the dialog box back up.
- 5. In the **My Views** section, select the newly created view (right).

Custom Views		\times
Save Custom View		
Name this view		_
Make it my default	Save	
My Views		
Collection issue QFT4	2	
	Collection issue QFT4	
Other Views		
√ 🕕 Original (default)	Hidden U	ser
	Manage Views	\rightarrow



The dashboard refreshes, and the **View** option in the Tableau Toolbar now displays the name of the newly created Custom View (left).

Note: You can skip steps 4 and 5 above if you check the <u>Make it my default check box</u> for the new view before clicking the **Save** button.

To create additional Custom Views, filter/modify the View again and repeat the steps above, entering a different name into the **Name this view** text field for each new Custom View.

Notes:

- You can click any Custom View in the **My Views** section of the **Custom Views** dialog box to select it (right).
- All Custom Views are private. You cannot share a Custom View with other users.

Reverting to Original View

To revert to the original view of a dashboard:

1. In the Tableau Toolbar, click the View option (right).

My Vi	ews	
\checkmark	Collection issue QFT4	

ılı	View:	2024	to	Date
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The **Custom Views** dialog box appears.

2. In the **Other Views** section, click **Original**.

Save Custom View			
Name this view			
2024 to Date		>	×
Make it my default			
		Save	
My Views			
✓ 2024 to Date			
Other Views			
II Original (default)		Hidden Use	er
	Original	Manage Views $ ightarrow$	

The dashboard automatically reverts to Original view.

Setting a Custom View as the default view

To set a Custom View as your default view, check the **Make it my default** check box (right) in the **Save Custom View** section of the **Custom Views** dialog box.



Editing and deleting Custom Views

You can access further options for managing Views via the **Manage Views** link at the bottom of the **Custom Views** dialog box (right).

Other Views	
III Original (default)	Hidden User
	Manage Views \rightarrow

For each saved view, Manage Views provides two options:

Custom Views		×
Manage Views		
My Views		
III 2023 to date	lî lî	Ø Ø

• Rename this view: To rename the view, click the pencil icon *[...]*.

A text field appears in the **Custom Views** section above. Edit the name, then click outside the text field to automatically save your change.

Custom Views		\times
2024 to Date		×
My Views		
✓ III 2024 to Date		Ø Ø
III PATHC	<u>/</u>	<u>``</u>

• Delete View: To delete the view, click the trash icon 🗐.

A message appears, asking if you are sure you want to delete the view. Click either the **Cancel** or the **Delete** button.

Custom Views	
Manage Views	
My Views	
✓	
ATHC Delete	
Other Views	

The slashed-eye icon indicates **View Status**; that is, that this **Custom View** is private.

Downloading data

Activity Metrics provides several options for downloading data. We recommend using the **Crosstab** option to ensure that you retrieve the most complete information. There are two ways of downloading crosstab data.

Downloading data from the main dashboard tab

To download data directly from a dashboard's main tab:

1. At top right of the dashboard, click the **Tableau Download** icon.



The Tableau Download drop-down menu appears (right).

2. Select the **Crosstab** option.



The Download Crosstab dialog box appears.

Download Cross	tab			\times
Select a sheet fr	om this dashboa	ard		
3 🖬 💷	ıll	II	II	ıll
Bars by Month	Last Date	Primary Reas	Table By Mont	TouchPoin
Select Format				
• Excel (⊃ csv			5
4			Dow	nload

3. Select the exact sheet you want to download.

Note: Do not select any sheet whose filename begins with Z_.

- 4. Under Select Format, select the radio button for Excel.
- 5. At bottom right, click the **Download** button.

Downloading data from the Export tab

To download data from the **Export** tab of a given dashboard, in the Tableau Toolbar:

1. Click the **Export** tab.

For example, on the **Service Touchpoint** dashboard, click the **Service Touchpoints Export** tab (right).

Ć	Ċ	5	C.	G	ightarrow	\overline{v}		١.	View: Original
Service	Touch	points	Serv	rice To	uchpo	oints	s Exp	oort	
							<	21	-

The **Export** tab for the given dashboard appears.

	TEST CATALOG	ORDERING & RESULTS	SPECIMEN HANDL	ING CUSTON	IER SERVICE	EDUCATION & INSIGHTS	CONTACT	SEARCH		
TIVITY METRICS				Volumes						
	View: Original									
Touchpoints Service Touchpoints Exp										
ice Touchpoints Export										
load Instructions							Load Table with	a Maximum of	1,0	100 rows (Default)
e table with the number of rows to exp	ort. Click the Tableau download icon,	, select Crosstab, then choose the wo	rksheet and required dow	nload format (Excel or CS	/).		Load Table With	a Maximum of		
Note: Depending on vario										
Note: Depending on varia	us factors such as filter selections, inte	ernet speed, or network traffic, the tabl	e below may take extra time	(several minutes) to load a	nd export.					
<u>L</u>										
Account Number Health System Name	Facility Name	Attention Line	Primary Reason Code	Secondary Reason Code	Creation DT CT	Order DT CT	Mayo Order Number	Client Order Numb	er Mayo Test	t ID. Mayo Test Name
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Account Number Health System Name	Facility Name	Laboratory Laboratory	Additional Specimen Application Support Application Support Application Support Application Support Application Support Possible Cancel Test Possible Cancel Test Possible Cancel Test Possible Cancel Test Possible Cancel Test Possible Cancel Test Specimen Panding Arriv, Specimen Panding Arriv,	Addrinnal Specimen Addrinnal Specimen Application Support Application Support Application Support Application Support Application Support Physical Burket Specimen Stability Temperature Attend Amarting Recept Pending Recept	04/22/02022.17:51 07/04/2022.14:23 07/04/2022.14:23 07/02/2023.14:22 07/02/2023.14:22 07/02/2023.14:22 17/04/2023.14:35 01/17/2024.14:06 00/15/2024.14:13 01/12/2024.12:45 01/04/2022.12:45 07/04/2022.14:06 00/02/2022.14:00 00/02/2022.14:00 00/02/2022.14:00 00/02/2022.14:13 09/12/2022.14:14 09/12/2022.14:14 09/12/2022.14:14 09/12/2022.14:14 0/12/2021.14:14 0/12	08/19/2022 12:88 10/08/2023 15:43 10/08/2022 12:38 01/02/2024 12:06 01/12/2024 12:06 01/12/2024 13:09 11/09/2023 13:08 07/13/2022 12:27 08/01/2022 12:27 08/09/2022 16:04 09/09/2022 12:04 11/08/2022 12:04	M M M M M M M M M M M M M M M M M M M	N/A N/A N/A N/A	25HDN COXEU PLP HAIGM TCD4 OHPG QFT4 QFT4 QFT4 QFT4 QFT4 QFT4 PHEP NICOU QFT4 NIS	25-Hydroxyntam Cocaine and meta Pyridoxal 5-Phosy Hopattis A tgMa CD4 T-c01 Count 17-Hydroxyproge QuantiFERON-TD QuantiFERON-TD QuantiFERON-TD QuantiFERON-TD Tissue Transglut Prevous Hopattis Nicotine and Met QuantiFERON-TD Tissue Transglut Nicotine and Met QuantiFERON-TD Justif, SO

By default, only the first 1,000 rows of data are shown in the table and may be downloaded.

2. *Optional:* Using the **Load Table with a Maximum of** drop-down menu, you can also choose to download 10,000 rows, 50,000 rows, or all data.

Load Table with a Maximum of	1,000 rows (Default) 🔹
	1,000 rows (Default)
	10,000 rows
	50,000 rows
	All Data

3. If you are downloadi.ng from the **Turnaround Time Export** tab, at top right, choose a data option from the **Display Data for** drop-down menu (right).

	Display Data For	
	(None) 💌	
	(None)	
	Turnaround Time Summary	
Na	Orders Beyond TAT Target	
	Turnaround Time Details	



If you are downloading from the **Volumes Export** tab, at top right, select **Volume Details** from the **Display Data for** drop-down menu (left).

4. At top right, click the **Tableau Download** icon 🖵 and, from the drop-down menu, select the **Crosstab** option.

The **Download Crosstab** dialog box appears.

Download Crosstab	×						
Select a sheet from this dashboard							
5 Service_Touc Z_Latest_Upd Z_Row_Count							
Select Format							
● Excel ○ CSV	7 Download						

5. Select the exact sheet you want to download.

Note: Do not select any sheet whose filename begins with Z_.

- 6. Under **Select Format**, select the radio button for **Excel**.
- 7. At bottom right, click the **Download** button.

Notes:

- To cancel a download that is taking too long, close the browser tab.
- You can also copy and paste data from the **Export** tab into an Excel spreadsheet:
 - 1. Click the cells, rows, or columns to highlight them.
 - 2. Press your **Ctrl** + **C** keys to copy the data.
 - 3. In the spreadsheet, press **Ctrl** + **V** to paste.

Downloading data from a section on a dashboard

To download data specific to one section of a dashboard:

1. Click in the section from which you would like to download data.

Note: The screenshots in this section show a test frequency utilization being downloaded from the **Volumes** dashboard.

Mayo Test I	Ds	1
Mayo Test ID	# Orders	2"
25HDN	4,890	
NAIFA	1,893	
QFT4	1,798	
RBPG	1,788	
FLCS	1,520	
FOL	1,294	
PEISO	1,122	

Note: Do not click on a specific data point or bar, which will cause Activity Metrics to filter that section by the corresponding data.

- 2. At top right of the dashboard, click the **Tableau Download** icon.
- 3. From the menu, select **Data**.

			2 ♀▼			
	🖂 Image					
	🖯 Data 🛛 🖑					
Mayo Test I	Mayo Test IDs					
Mayo Test ID	# Orders		PDF			
25HDN	4,971					
NAIFA	1,919		🖻 PowerPoint			
QFT4	1,820					
RBPG	1,809					

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Summary	Abe T_INTERACTIVE_DASHBOARDS_EXTRAMURAL_WCALCS Mayo Test ID	•# T_INTERACTIVE_DASHBOARDS_EXTRAMURAL_W # Orders	•# T_INTERACTIVE_DASHBOARDS_EXTRAMURAL_WCALCS # Orders	Abc T_INTERACTIVE_DASHBOARDS_EXT Mayo Test Name					
	25HDN	4,971	4,971	25-Hydroxyvitamin D2 and D3, S					
	NAIFA	1.919	1.919	Antinuclear Ab, HEp-2 Substra					
	QFT4	1,820	1,820	QuantiFERON-Tb Gold Plus, B					
	RBPG	1,809	1,809	Rubella Ab, IgG, S					
	FLCS	1,546	1.546	Immunoglobulin Free Light Ch					
	FOL	1,347	1,347	Folate, S					
	PEISO	1,144	1,144	Prot Electrophoresis and Isoty					
	FGEN	1,024	1,024	Fungal Culture, Routine					
	TSTGP	910	910	Tissue Transglutaminase Ab, Ig					
	SPEP	887	887	Electrophoresis, Protein, S					
	PATHC	771	771	Pathology Consult					
	VASC	650	650	ANCA Panel for Vasculitis, S					
	TGRP	625	625	Testosterone, Total and Free, S					
	CTDC	590	590	Connective Tissue Disease Cas					
→ rows 🔞	HCVON	569	569	HCV RNA Detect/Ouant, S					

The View Data window appears, displaying data for the selected dashboard section.

4. At top right of the window, click the **Download** icon.

The downloaded CSV file contains data from the selected section only.

А	utoSave 💽 (凹 らく	2 ~ ₽	VOL Line	by Te 丶	ې ر)		Œ	3 —		×
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1	Mayo Test ID	# Orders	# Orders	Mayo Test N	lame			÷				
2	25HDN	4,971	4,971	25-Hydroxy	/itamin [D2 and D3,	S					
3	NAIFA	1,919	1,919	Antinuclear	Ab, HEp	-2 Substrat	te, S					
4	QFT4	1,820	1,820	QuantiFERO	N-Tb Go	ld Plus, B						
5	RBPG	1,809	1,809	Rubella Ab,	lgG, S							
6	FLCS	1,546	1,546	Immunoglo	oulin Fre	e Light Cha	ains, S					
7	FOL	1,347	1,347	Folate, S								
8	PEISO	1,144	1,144	Prot Electro	phoresis	and Isoty	pe, S					
9	FGEN	1,024	1,024	Fungal Cultu	ire, Rout	ine						
10	TSTGP	910	910	Tissue Trans	glutami	nase Ab, Ig	gA/IgG					
**	VOL Li	ne by Test	data	+			: •					•
Rea	dy Scroll Lock 🕅	Accessibility:	Unavailable				E		<u> </u>		+	100%



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