

# ClinicFlow Reports

July 2023

ClinicFlow has a variety of reports that run regularly (daily, weekly, monthly) to support clinic operations and overall immunization program management. Below is a summary of the reports available to KCF end users.

You can access reports within the ClinicFlow Admin Console in the “Reports” tab found on the left-hand side navigation menu.

## Appointment Reports

Appointment reports provide detailed information about appointments. There are four appointment reports.

### Reports Available to Clinic Owners and Admins

- 1. Appointment Downtime Report (appointment-downtime):** This is a daily report (12:00 AM) that captures all patient details for each booked appointment in the future. One report is created for each clinic that has at least one future booked appointment (i.e. a report is not created if there are no future appointments booked).
  - a.** This report should be used in the event of system outage resulting in ClinicFlow being offline. It contains blank columns for information required to enter vaccinations (e.g., immunizer name, vaccine product, date/time of administration).
  - b.** It is also a helpful report to review upcoming appointments at a detailed level.
  
- 2. Appointment Clinic Stats Report (appointment-clinic-stats):** This is a daily report (12:00 AM) containing appointment statistics data for the week to date. It runs daily and captures all data for the current week (e.g., if run on Thursday, will include data from Monday onwards). One report is created for each Organization with at least one appointment booked, canceled, or scheduled in the current week.
  - a.** This report is helpful to look at the number of scheduled appointments for a given clinic day, broken down by services.

## Reports Available to KCF Team Only

- 3. Appointment Language of Service Report (appointment-language):** This is a monthly report that offers an overview of all appointments booked and their language of service (based on their answer to the preferred language question on the demographics form [English, French, None]). One report is created for KCF with data grouped by Clinic. The report will capture all appointments booked, including those that are canceled, for the prior month (e.g., a report run in March will contain all February appointments).
- 4. Patient Appointment Summary Report (patient-appointment):** This is a monthly report that provides the total number of patients who have booked, cancelled, or completed an appointment, and those with uncompleted appointments (no shows), for the previous month (e.g., the March report will contain all February patients). One report is created for KCF with data grouped by Clinic.

## Immunization Reports

Immunization reports provide detailed information about immunizations administered at clinics. There are two immunization reports. All Immunization Reports are available to Clinic Owners and Admins.

- 1. Clinic Vaccination Today Report (clinic-vaccination-today):** This is a report that runs multiple times a day (1:00 PM, 4:00 PM, 5:00 PM, 6:00 PM, 7:00 PM, 8:00 PM) containing dose information for vaccinations administered at a given clinic on the specific day. One report is created for each clinic that has had at least one dose administered on a given day.
  - a. This report is helpful to reconcile the doses administered at the end of the clinic day.
- 2. Clinic Vaccination Summary Report (clinic-vaccination-summary):** This is a daily report (12:00 AM) containing patient and dose information for all vaccinations administered at a clinic since the last report run. One report is created for each Clinic that has had at least one dose administered since the last report run.

## Patient Reports

Patient reports provide detailed information about patient demographics, sociodemographics, and the Patient Experience Survey. There are six patient reports.

### Reports Available to Clinic Owners and Admins

- 1. Patient Sociodemographic Organization Report (patient-sociodem):** This is a quarterly report capturing all Sociodemographic Form data for all patients who completed a form in the previous quarter (Jan-Mar, Apr-Jun, Jul-Sep, Oct-Dec). One report is created for each Organization that had at least one Sociodemographic Form completed in the last quarter.
- 2. Patient Postal Code Organization Report (patient-postalcode):** This is a monthly report providing a summary of locations where appointments booked or canceled in the previous month, grouped by postal code. One report is generated for each Organization with at least one booked appointment in the previous month.

### Reports Available to KCF Team Only

- 3. Patient Demographics Age Distribution Report (pat-demo-age):** This is a monthly report detailing the number of children per age range (0-2m, 2-4m, 4-6m, 6-8m, 8-12m, 12-15m, 15-18m, 18-24m, 2-4y, 4-6y, 6-8y, 8-10y, 10-12y, 12-14y, 14-15y, 16-18y, >18y) in each service group. One report is created for KCF.
- 4. Patient Demographics HCN Report (pat-demo-hcn):** This is a monthly report detailing the number of children by health card type (OHIP, Other [non-Ontario], and None). One report is created for KCF.
- 5. Patient Demographics PCP Report (pat-demo-pcp):** This is a monthly report detailing the number of children with and without a primary care provider (PCP), based on their answer on the question about having a PCP on the demographics form. One report is created for KCF.
- 6. Patient Experience Survey Report (pat-exp-survey-weekly):** This report runs both on a weekly and quarterly basis. The report captures all Patient Experience Survey data for all patients who completed the survey in the time frame (i.e. past week or past quarter). One report is created for KCF. These reports provide data on the patient's experience with the booking system, convenience, and customer channel. Reports are generated only for KCF.

## PHIX Report

PHIX enables Public Health Units to upload immunization records from ClinicFlow to Panorama.

1. **PHIX Reports (phix):** This is a daily report that captures patient and dose information formatted in alignment with PHIX specifications (R3.6). It will include one row for each dose that has been either added, updated, or deleted since the last report run. One report is created for each participating PHU (LGL, RCHDU, EOHU, OPH) and includes Clinics that are under each PHU organization.
  - a. **NOTE:** Service delivery locations (SDL) are configured on the Clinic in ClinicFlow and *must* match with the list from PHIX. Further, the trade names (conceptId) in the report *must* match with the list from PHIX. If a SDL and/or conceptId is not found in PHIX, then the file will fail to load.

## Data Quality Report

Data quality reports are only available to the KCF team and are used to clean-up data to ensure data integrity.

1. **Duplicate Patient Report:** This is a weekly report (Monday 12:00 AM) providing a list of all potential duplicate patients in the ClinicFlow. One report is generated for KCF. It will look for the following combinations:
  - a. **Duplicate HCN:** Patients with the same Health Card Number (HCN)
  - b. **Duplicate Name/DOB:** Patients with the same (1) first 5 characters of last name; (2) first 3 characters of first name; and (3) same date of birth
  - c. **Duplicate Name/PC:** Patients with the same (1) first 5 characters of last name; (2) first 3 characters of first name; and (3) same postal code (must be populated).
  - d. **Duplicate Name/Phone Number:** Patients with the same (1) first 5 characters of last name; (2) first 3 characters of first name; and (3) same phone number.