<u>Chat from Zoom- Aria</u>

- AURA report
    1. Under scheduling reports select department schedule.
    2. Click on Filters arrow to add the following filters:
    a. Attribute is activity status, operator equals, value cancelled and click green "+".
    3. Click apply button
    4. Select the desired date range and activity type of appointments.
    5. Click view report button
    6. Click the export button and CSV option.
    7. Select where you want the report to send to and click save.
    8. Open the saved file.
    9. Add the filter option to the data
    10. If there are multiple departments select the desired department
    11. Filter on the desired activity of treatment
    12. This will generate the report to investigate by diagnosis

- How are others documenting cancellation reasons in Aria?
    - One of my sites- uses the text in the cancellation. The other site uses a journal note for documenting reasons in Aria
    - we use journal notes and have different journal type descriptions for each reason (example Cancellation- No Show)
    - We use text on the appointment as the reports in AURA pull the comments

- Workflow: I use the Dept Schedule and Machine Schedule. I use Attribute: Resource Name, Operator: equals, Value: (name of machine); Attribute: appointment status, Operator: contains, Value: *Cancel*; and Attribute: Activity Name, Operator: contains, Value: *Treat* - using the asterisks tends to encompass all treatment appointment types and all different cancellations vs running separate reports for each type of treatment appointment and each type of cancellation.

- I'm only doing 2 locations for this and do manually check daily and have a spreadsheet to check all the criteria.

- We are small and reviewing all sites for the project, so far I am manually reviewing each patient for their treatment type and # of fractions. We also make notes on the text for the cancellations.

- **Insightive Dashboard Activity Analysis**
    1. Filter selections:
    a. Select hospital if multiple sites.
    b. Select Diagnosis site.
    c. Select resource type as machine.
    d. Can select individual machines
    e. Select applicable activity category retreatment
    f. Can select activity name
    g. Select activity status of cancelled and cancelled – patient no-show
    h. Select activity type of appointment
    i. Select desired activity date
    2. Once the dashboard updates click on a specific block on the dashboard.
    3. Click on view data button
    4. Click on the full data tab. This will provide you the appointment date the patient cancelled for further research.

- **Insightive Dashboard custom Activity Analysis with patient information tab**
    1. Filter selections:
    a. Select hospital if multiple sites.
    b. Select Diagnosis site.
    c. Select resource type as machine.
    d. Can select individual machines
    e. Select applicable activity category retreatment
    f. Can select activity name
    g. Select activity status of cancelled and cancelled – patient no-show
    h. Select activity type of appointment
    i. Select desired activity date
    2. Click on the patient information tab. This will provide the list of patients that cancelled during the time frame for further research.

- **Insightive dashboard custom built appointment cancellation reason**
    1. Utilized the base of activity analysis with only treatment activity and built in filter of cancelled and cancelled – patient no -show
    2. Filters of hospital department, diagnosis site and appointment date.

    3. Displays patient ID, patient name, activity, appointment date and cancellation reason

    4. Cancellation reason is pulled from activity note

    You can view full data in Insightive, so patient info is there but it's hidden

- Where is the "appointment tracker"? Is it just the appointment scheduling?
  - Yes, appointment Tracker is a tab you can add in Appointment scheduling, but I think it is only in Aria 13 (?) and above.
  - Go into appointment scheduling and create new view then add a new tab
  - You can add patient tabs to dashboards in Insightive so the patient information isn't "hidden"