Region4
Genetics Collaborative

Preparing a DocSite Report

1. Go to https://patient.docsite.com/

2. Enter User Name and Password, click s**ign in**

3. Click the column header in the bar labeled "Reports"

4. From the Pull Down Menu select **“Create Report Criteria".** This opens a "Filter Wizard".

5. A list of sites available to you appears. Typically, this should include only the demo/test site and your local site. If you have additional sites available to you, please report to Sally Hiner shiner@mphi.org immediately.

6. **Click the box next to your site's name**. Do not include the demo site because it includes false patients. Then **click "Next".**

7. At this point, you can select individual providers or "Select All". For a complete report on your site, "Select All". The program will fill in the check boxes for all providers.

8. The next query is for "Insurer". Just click "Next". Ditto for "Employer".

9. The next filter step is "Condition". This will look a little confusing because each condition seems to be listed multiple times. This is because of our peculiarity of having one set of information to generate the planners and an identical set of information for the web-based entry.

   To get a report on a given condition:
   - if the data are on the enrollment survey, pick all versions of enrollment for that condition and check those boxes.
   - If the data are on the interval survey, pick all versions of the interval survey.
   - If you want all data about a given condition, pick all surveys that have that condition’s name in its title.

   To get a report that includes all patients you were following, "Select All".

10. Next is "Measure". This is the most complicated selection point. Here, every single possible question that we've ever thought of will appear if you have previously "selected all" of the "Conditions".

    To get a specific report on the data item you want, you have to scroll through and find the data elements you want information about. Check the boxes for the data element you want, then click "Next".

[You'll notice that the information you are building is appearing as a list on the left side of the screen. You can back up at any point by clicking on this list if you'd made a wrong decision.]

11. The next filter step is "Patient Demographics". You can set this filter up as you please or simply click "Next". (To overtly include deceased patients, you will have to click the radio button "Ignore Patient Status".)

12. The next filters are "Race/Ethnicity/Language" and "Co-morbidity". Again, you can set filters if you wish, or click "Next" to auto select the "ignore" option. Generally, we won't be using co-morbidity, so you will almost always "ignore" this.

13. The next step is "Measure Line Item". This allows you to do some Boolean sorting as needed based on the specific measures that you were interested in Filter Wizard step 7.

14. The next filter step is "Measures to Include in Report". Here, you will find the measure you pick in step 7 already auto checked. You can pick additional measures for the report here also. They won't be subject to the filtering process you've already set up.

    [Choosing "Select All" as an answer at this point is discouraged because that will create a very giant spreadsheet that may choke your computer.]

15. To finish the report, click “Finish".

16. If you think you will want to see this report again, name the report and save it. You can then “choose an action". Here, going to "Reports" will not do much for you as it takes you to the list of standard DocSite reports which are unfortunately not particularly useful in this context.

17. To see your data, pick " Export Data".

18. The screen directs what your report will look like. Use the pull down menu to choose "one line per patient" or "one line per measure date" depending on whether you are picking up data for a fixed time point or all data over time.

    When you pull down these choices on the menu, the screen changes.

    If you've picked “one line per patient" you will have the choice to "export to a text file", or "export to Excel". Generally, you'll want an Excel report.

    Also, to get a complete report, click the box labeled "full denominator".

There are a bunch of boxes below those questions. These are what will actually appear on the report. Pick the boxes that are appropriate for your report.

Critical to this: if you are looking for a data item, make sure you pick the box labeled "Measure Results".

19. (Here's what you've been waiting for) -- -- click "Download Data". A new window will pop up. You'll have to do the usual acceptance of downloading that Microsoft loves, then your spreadsheet will appear as a .csv file. You can rename this, save it, and do whatever else you want to with it.

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To get back to your saved report: (that you saved above in Step 16)
Click on "Reports" on the gray horizontal bar.

Pick " Saved Report Criteria". A list of your saved reports will appear. Although it seems like picking "Run Report" would be logical, this will not work.

Pick "Select". This will take you back to 14, above. From there, you can complete the report, or make any amendments and rename the report as you please.