Scheduler Analytics Data Dictionary

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Facts

In Microsoft Excel, 'Facts' are the actual numbers that you are able to analyze/report on. This type of data is quantitative (numbers).

- **Appointment:** This data is derived from all appointments created in the iScheduler.
  - Appointment Count: The total number of unique appointments.
  - Appointment Duration: The total number of minutes for all appointments.
- **Blackout**: Users can add Blackout Overlays on a schedule template. This type of overlay prevents appointments from being scheduled in this space.
  - Blackout Count: The total number of unique blackout overlays on a schedule template.
  - Blacount Duration: The total number of minutes for all blackout overlays.
- **Employer**: Some practices may utilize the iSalus Employer Module. If so, this is the Employer Entity that is configured. This is very rarely used.
  - Employer Count: The total number of unique employers in the employer module.
- **Placeholder**: Users can add placeholders on a schedule template. This is a predetermined appointment slot used to force specific scheduling habits.
  - Placeholder Count: The total number of unique placeholders slots.
  - Placeholder Duration: The total number of minutes for all placeholder slots.
- **Resource**: A resource is an entity that an appointment can be scheduled with. Most commonly, this is a provider, but could be a room, a nurse, or any other type of schedule that makes sense for the practice.
  - Resource Count: The total number of unique resources.
  - Workday Duration: Each resource must have a Workday Start Time and Workday End time (used to determine when they are expected to be in the office). This represents the total number of workday minutes allotted.
- **Values**
  - Appointment Type %: Expected to be used with the 'Appointment Type' dimension. This specifies how frequently an appointment type is used in the practice.
  - Employee Appointment Count %: Only used for practices with Employer Module feature enabled.
  - Employee Type %: Only used for practices with Employer Module feature enabled.
  - Employer Appointment Count: Only used for practices with Employer Module feature enabled.
  - Placeholder Usage %: Percentage of placeholders that have appointments assigned to them.
  - Resource Usage %: Percentage of resources workday filled with appointments.

Dimensions

In Microsoft Excel, 'Dimensions' are how you might analyze or break down a number. This type of data is qualitative (categories).

- **Appointment Detail:** Appointments will be assigned details that represent the user that created or updated an appointment, as well as the date hierarchy.
  - Created By: The user who created the appointment.
  - Created Date Hierarchy: Selecting this value will break out the included appointments, starting with the year, then drills deeper. Example: 2026 -> Q1 -> January, February, March -> 2018-01-01, 2018-01-02, 2018-01-03, etc.
  - Updated By: The user who last updated the appointment
  - Updated Date: Selecting this value will break out the included appointments, starting with the year, then drills deeper. Example: 2026 -> Q1 -> January, February, March -> 2018-01-01, 2018-01-02, 2018-01-03, etc.
- **Appointment Status**: Appointments will always be assigned to a status. This represents where the appointment is within the workflow.

    - Appointment Status: The name of the status of the appointment (i.e. Scheduled, Cancelled).
    - Appointment Status ID: The internal ID of the status of the appointment (i.e. 1, 6).
- **Appointment Type:** Appointments and Placeholders will always be assigned an appointment type.
    - Appointment Type: The name of the appointment type utilized (i.e. New Patient).
    - Appointment Type ID: The internal ID of the appointment type (i.e. 3).
- **Blackout Reason**: All blackout overlays that are scheduled can have a predetermined Blackout Reason.
    - Blackout Reason: The name of the reasons associated with the blackout overlay (i.e. Vacation, Sick).
    - Blackout Rason ID: The internal ID of the reason associated with the blackout overlay (i.e. 1, 3).
- **Clinic Access End Date**: Only used for practices with Employer Module feature enabled.
- **Clinic Access Start Date**: Only used for practices with Employer Module feature enabled.
- **Date:** Date of the appointment or placeholder.
    - Date.Hierarchy: Selecting this value will break out the included appointments, starting with the year, then drills deeper.
        - Example: 2018 -> Q1 -> January, February, March -> 2018-01-01, 2018-01-02, 2018-01-03, etc.
    - Date.Date Id: The iSalus unique identifier for the calendar date.
    - Date.Date Value: Selecting this value will break out the included appointments by calendar date, regardless of year.
    - Date.Quarter Value: Selecting this value will break out the included appointments by Quarter, regardless of year.
    - Date.Year Month: Selecting this value will break out the included appointments by Month, regardless of year.
    - Date.Year Value: Selecting this value will break out the included appointments by Year.
- **Department:** Only used for practices with Employer Module feature enabled.
- **Employee Type**: Only used for practices with Employer Module feature enabled.
- **Employer**: Only used for practices with Employer Module feature enabled.
- **Employer Group**: Only used for practices with Employer Module feature enabled.
- **First Appt Date**: Date of the patients first scheduled appointment.
    - First Appt Date.Hierarchy: Selecting this value will break out the included appointments, starting with the year, then drills deeper.
        - Example: 2018 -> Q1 -> January, February, March -> 2018-01-01, 2018-01-02, 2018-01-03, etc.
    - First Appt Date.Date Id: The iSalus unique identifier for the calendar date.
    - First Appt Date.Date Value: Selecting this value will break out the included appointments by calendar date, regardless of year.
    - First Appt Date.Quarter Value: Selecting this value will break out the included appointments by Quarter, regardless of year.
    - First Appt Date.Year Month: Selecting this value will break out the included appointments by Month, regardless of year.
    - First Appt Date.Year Value: Selecting this value will break out the included appointments by Year.
- **Health Plan Group**: Only used for practices with Employer Module feature enabled.
- **Locality:** Only used for practices with Employer Module feature enabled.
- **Patient**: Patient associated with the appointment.
    - Address: Patient address
    - City: Patient city
    - Dob: Date of Birth
    - First Name: Patient first name
    - Last Name: Patient last name
    - Patient Id: iSalus Unique ID
    - Patient Name: The patient's full name, structured in the following manner: Patient Last Name, Patient First Name, Patient Middle Initial (Patient Nick Name).
    - State: Patient state

    - Zip Code: Patient zip code
- **Placeholder:** Users can add placeholders on a schedule template. This is a predetermined appointment slot used to force specific scheduling habits.
    - Utilized: Determines if a placeholder has an appointment associated with it or not. Produces the options of 'Utilized' or 'Not Utilized'.
    - Utilized Id: Determines if a placeholder has an appointment associated with it or not. Produces the options of '1' or '0'.
- **Registration Date:** Only used for practices with Employer Module feature enabled.
- **Resource:** A resource is an entity that an appointment can be scheduled with. Most commonly, this is a provider, but could be a room, a nurse, or any other type of schedule that makes sense for the practice.
    - Resource Id: Internal ID of the resource (i.e. 343)
    - Resource Name: Name of the resource (i.e. Nurse Schedule)
- **Resource Category**: A resource can be assigned to a category and grouped in a logical fashion. Practices can setup their own categories as desired.
    - Resource Category ID: Internal ID of the resource category (i.e. 1).
    - Resource Category Name: Name of the resource category (i.e. Personnel).
- **Resource Type**: A resource category can be further classified by creating resource types. Practices can setup their own types as desired.
    - Resource Type ID: Internal ID of the resource type (i.e. 2).
    - Resource Type Name: Name of the resource type (i.e. Providers or Therapists).
- **Service Location**: A service location is the physical place where the appointment is to take place.
    - Service Location ID: Internal ID of the service location (i.e. 2282).
    - Service Location Name: Name of the service location (i.e. North Office).
- **Sub Population:** Only used for practices with Employer Module feature enabled.
- **Time**: This refers to the time of the scheduled appointment or placeholder.
    - Time Display: Appointment time, formatted as HH:MM AM/PM (i.e. 11:15 AM).
    - Time Hour: The hour of the scheduled appointment (i.e. 11).
    - Time Id: The unique ID that represents the time (not recommended to use).
    - Time Minute: The minute of the scheduled appointment (i.e. 15).
- **Wellness Date**: Only used for practices with Employer Module feature enabled.
