Using the Public Health Case Reporting Dashboard

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Prerequisite Checklist of Requirements for Turning on the Case Reporting Feature

To begin using the Dashboard the steps listed below should be completed. If they are not just reach out using your support case to get your next steps for going live:

☐ **1.** The practice has notified their PHA of their intent and received direction on how to proceed

☐ **2.** The practice has SES Direct Messaging for their practice

☐ **3.** The required PHA setup has been performed to allow for testing (support team with assistance from product team)

☐ **4.** The client's PHA and AIMS testing was performed in conjunction with iSalus (requires completion of AIMS coordinated test scenarios)

✔ **5.** AIMS has provided the Testing status as Pass and Approval for Go Live is obtained

☐ **6.** Support has coordinated the practice Go Live to ensure users have access and we answer any questions

> With all of the items listed above completed, your practice is now live on the Automated Case Reporting Module and should develop practice workflows to transition your manual case reporting process into one that uses this automated reporting process to monitor activity between your EMR and your PHA.

Using the Case Reporting Dashboard

With AIMS approval to Go-Live for your practice, your team should be aware of your Go Live date where automated case reporting begins. You will then use the Case Reporting Dashboard to track Case Reports submitted automatically and to view Response Reports that your PHA sends back to you in response.

Enable Case Reporting for practice users

- Case reporting access should be automatically available to users with EMR access and patient timeline access - you will be able to see outbound and inbound activity as a Health Exchange timeline item.
- Users with access to reports can be given access to the Case Reporting Dashboard report

Access the Case Reporting Practice Level Data and Functionality

- Navigate to **Report → Case Reporting** in your EMR to see the practice level view of Public Health Case Reports sent out and the associated inbound Response Reports
- Enter a date range and click **Search** to see activity for that period
- The Export button exports the filtered eICR records into an Excel document for use as a PHA Submission Report or to produce data that can be used for building a practice level PHA Case Submission Report
- **Dashboard Features:**

- **Sent Queue**: Shows automated outbound reports.
- **Unsolicited Queue**: Shows inbound reports that need manual review.
- **Check Status & Preview Files**
  - Statuses include *Waiting for Response*, *Completed*, *Failed*.
  - Use the **Sent** and **Received** buttons to view the outbound eICR and inbound RR files.

View Case Reports at the EMR Chart Level for a Specific Patient

- In the EMR from the **Patient Timeline** view you can see outbound eICR CCDA sends and the associated Response Reports (RRs) that are sent back from your PHA via AIMS:
  - The eICRs and the RRs display on the patient's chart timeline under **Health Exchange**.
  - Click the arrow icon to open the report details directly from the chart.