

## How to Run Data Reports in e2Fulton

This document is intended to be a high-level overview for how to pull demographic and performance measure data in e2Fulton.

There are two data reports discussed in this document.

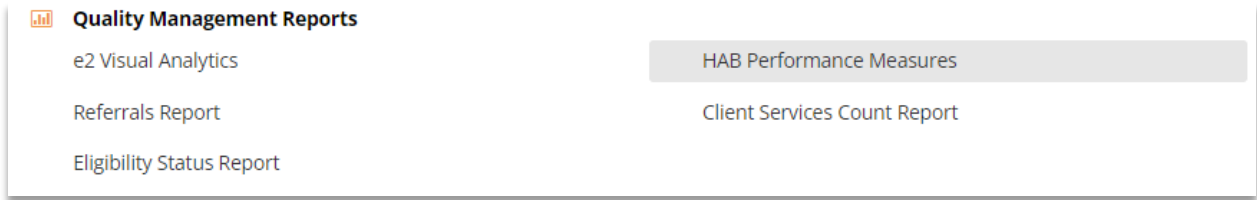
- *HAB Performance Measures* shows your agency's performance measures. It allows you to filter for service categories, funding source, and/or provider, but does not let you filter within sub-populations. More performance measures are available in *HAB Performance Measures* than in *e2Visual Analytics*.
- *E2Visual Analytics* can be used to pull:
  - Demographic information about populations served.
  - Information on subpopulations by using filters and breakdowns.
  - Drill-down information on four Performance Measures:
    - Viral Load Suppression
    - Prescribed Antiretroviral Therapy (ART)
    - Gap in Medical Visits
    - Annual Retention in Care

The document includes:

- Instructions for pulling [HAB Performance measures](#)
  - [Appendix A](#) – List of HAB Performance Measures
- Instructions for pulling [e2Visual Analytics](#)
  - [Appendix B](#) – Display sections in e2Visual Analytics
  - [Appendix C](#) – Custom filters and breakdowns in e2Visual Analytics

# HAB Performance Measures

## Step 1: Go to Reports → HAB Performance Measures



**Quality Management Reports**

- e2 Visual Analytics
- Referrals Report
- Eligibility Status Report
- HAB Performance Measures**
- Client Services Count Report

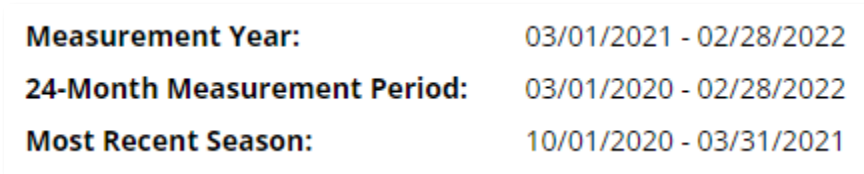
## Step 2: Select appropriate Date Range



Date Range: From Date:  To Date:

This is the date range that a client received a service. It is recommended to run most data for a one-year period.

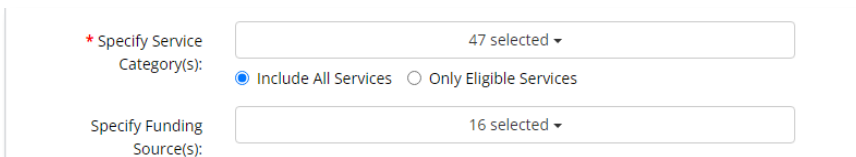
The report will list the measurement periods at the top of the report.



**Measurement Year:** 03/01/2021 - 02/28/2022  
**24-Month Measurement Period:** 03/01/2020 - 02/28/2022  
**Most Recent Season:** 10/01/2020 - 03/31/2021

**Please note:** The *Medical Visit Frequency* performance measure must be run on a two-year (24 month) period to get accurate data.



## Step 3: Specify Service Categories and Funding Source if applicable

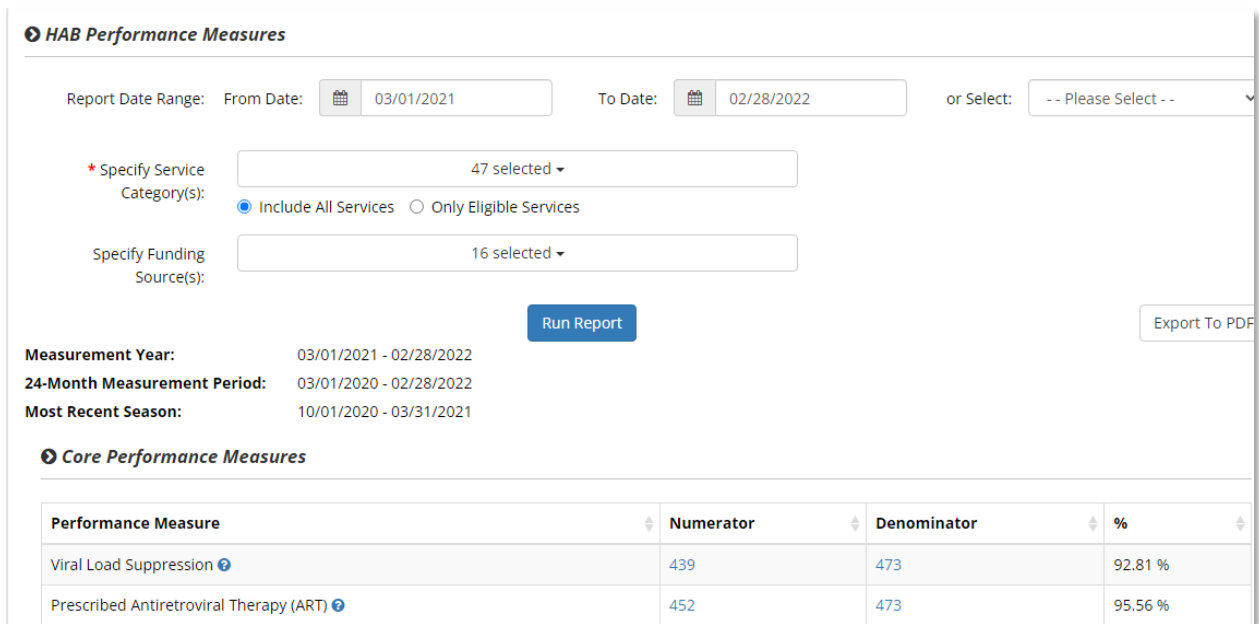


\* Specify Service Category(s):   Include All Services  Only Eligible Services

Specify Funding Source(s):

#### Step 4: Select *Run Report*.

The report will show you the *Measurement Period* (one year for most measures). The data will display with the numerator, denominator, and percentage. You can click on the blue question mark icon  for the data definition for each measure. Measures with special notices on how to run them such as Medical Visit Frequency will have an exclamation point icon . See [Appendix A](#) for available measures.



**HAB Performance Measures**



Report Date Range: From Date:  To Date:  or Select:

\* Specify Service Category(s):   Include All Services  Only Eligible Services

Specify Funding Source(s):

Measurement Year: 03/01/2021 - 02/28/2022  
24-Month Measurement Period: 03/01/2020 - 02/28/2022  
Most Recent Season: 10/01/2020 - 03/31/2021

**Core Performance Measures**

Performance Measure	Numerator	Denominator	%
Viral Load Suppression 	439	473	92.81 %
Prescribed Antiretroviral Therapy (ART) 	452	473	95.56 %

# E2Visual Analytics

## Step 1: Go to Reports → e2Visual Analytics



**Quality Management Reports**

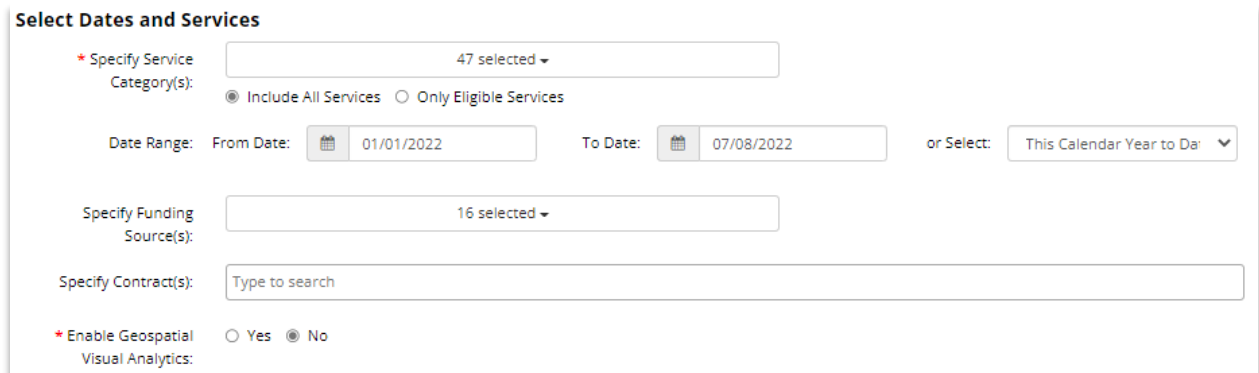
- e2 Visual Analytics (highlighted)
- Referrals Report
- Eligibility Status Report

HAB Performance Measures

Client Services Count Report

## Step 2: Select Dates and Services

- Select Date Range according to instructions on [page 2](#).
- Specify Service Category and Funding Source if applicable
- If desired, *Enable Geospatial Visual Analytics* (this will show you the information on a GPS enabled map)



**Select Dates and Services**

\* Specify Service Category(s): 47 selected ▾  
 Include All Services  Only Eligible Services

Date Range: From Date:  01/01/2022 To Date:  07/08/2022 or Select: This Calendar Year to Date ▾

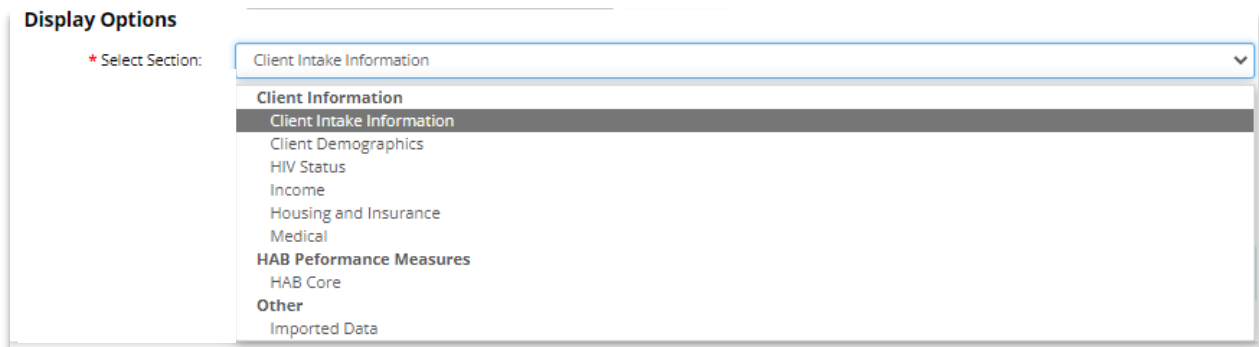
Specify Funding Source(s): 16 selected ▾

Specify Contract(s):

\* Enable Geospatial Visual Analytics:  Yes  No

## Step 3: Under Display Options → Select Section

Under Display Options, select a Section. This will determine *which data* is displayed.

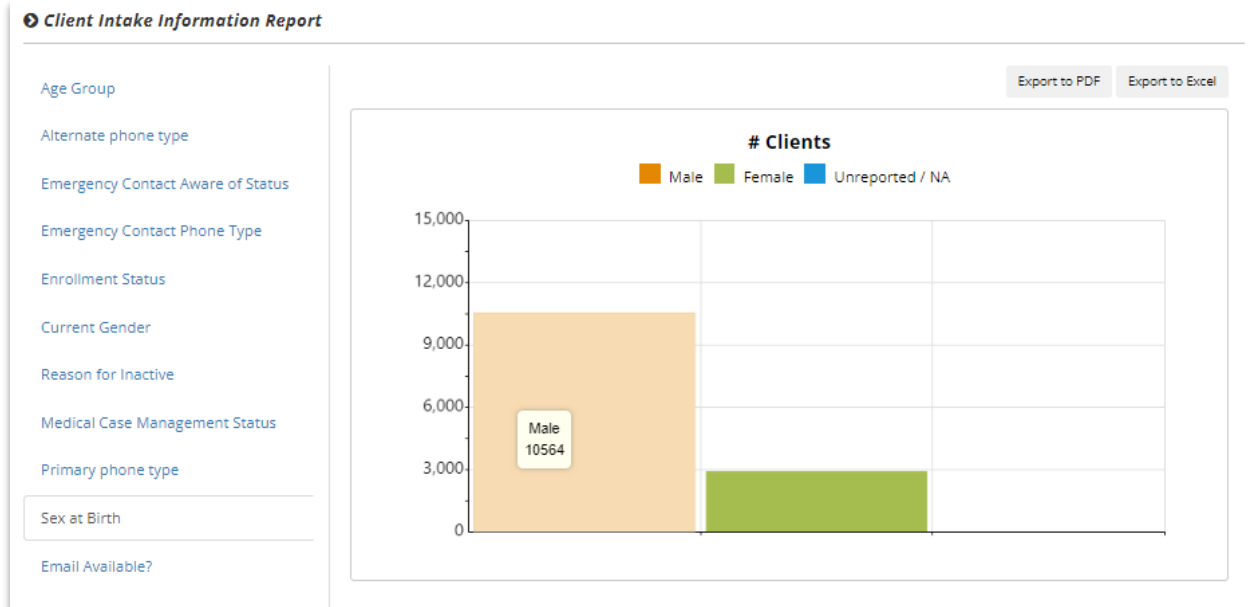


**Display Options**

\* Select Section: Client Intake Information ▾

- Client Information**
- Client Intake Information (highlighted)
- Client Demographics
- HIV Status
- Income
- Housing and Insurance
- Medical
- HAB Performance Measures**
- HAB Core
- Other**
- Imported Data

Each section will display data in multiple tabs. Click on the desired tab to get data on the variable of interest. See [Appendix B](#) for more information on the Sections and Tabs.



**Step 4 (optional): If desired, select or breakdown the data by population of interest**

You can get at select populations by either using *Custom Filters* or *Breakdowns* or a combination of the two. It is also possible to run the data without using any filters or breakdowns.

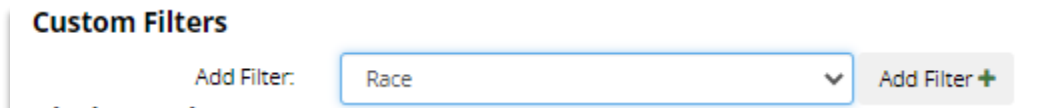
The screenshot shows a user interface for configuring data filters and display options. Under the heading "Custom Filters", there is a label "Add Filter:" followed by a dropdown menu currently showing "- Select -" and a green "Add Filter +" button. Below this is the "Display Options" section, which includes a label "\* Select Section:" followed by a dropdown menu showing "HAB Core". At the bottom, there is a label "Break down by (select up to two):" followed by a dropdown menu showing "None selected".

See [Appendix C](#) for the most common Custom Filters and Breakdowns.

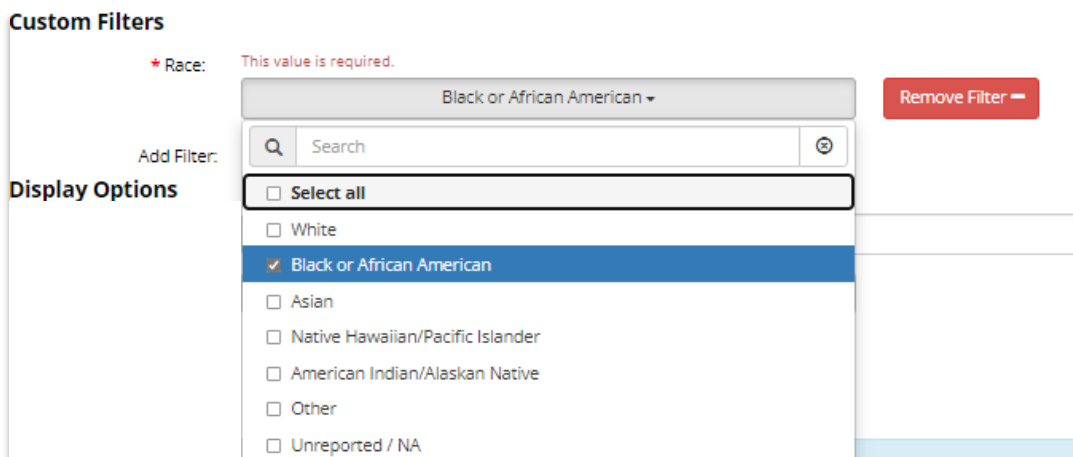
### Step 4a. Using Custom Filters

*Custom Filters* are useful for looking at a specific population of interest. You can add multiple custom filters to get a select population (i.e., African American MSM).

To add a *Custom Filters*, click on the *Add Filter* drop menu and select the desired filter.



Click the grey *Add Filter* button. Click on the dropdown menu and select **only the population you are interested in.**



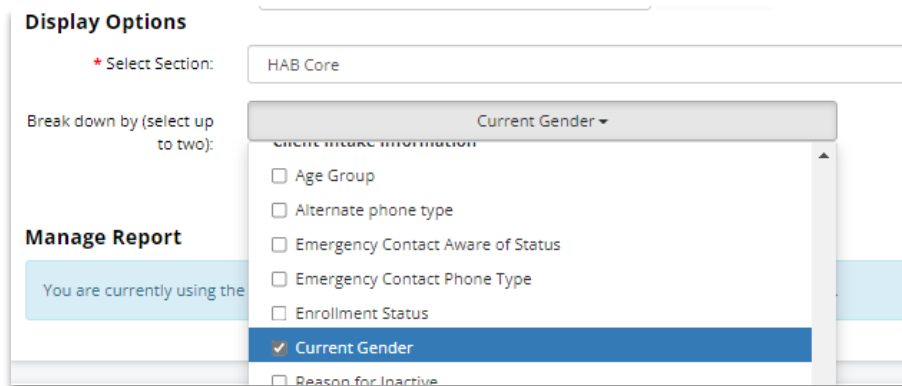
The system will display this information as a single table, but only the population selected will display (in the example above, only African American individuals).

Table InVLSuppression: HAB - Viral Load Suppression ⓘ		
	# Clients	%
Compliant	2210	53.7%
Non-Compliant	1909	46.3%
<b>Total</b>	<b>4119</b>	<b>100%</b>

### Step 4b. Using Breakdowns

Breakdowns are useful for getting stratified data. This will break up a measure by the breakdown that you select.

To add a *Breakdown*, click on the drop-down menu and select the desired breakdown. The system allows you to select up to two breakdowns.



The system will show this as stratified data or data broken down by what was selected (in this case, current gender).

	Male	Female	Unknown	Transgender Male to Female	Transgender Female to Male	Transgender Other	Unreported / NA	Total	%
Compliant	1826	750	0	48	0	0	0	2624	54.5%
Non-Compliant	1569	594	0	26	0	0	0	2189	45.5%
<b>Total</b>	<b>3395</b>	<b>1344</b>	<b>0</b>	<b>74</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4813</b>	<b>100%</b>

## Step 5: Run the report

Once you have completed Steps 1-4, select the “Run Report” button.

The screenshot shows a web-based report configuration interface with the following sections and controls:

- Select Dates and Services**
  - \* Specify Service Category(s): 47 selected ▾
  - Include All Services (selected) / Only Eligible Services
  - Date Range: From Date: 01/01/2022 / To Date: 06/27/2022 / or Select: This Calendar Year to Date ▾
  - Specify Funding Source(s): 16 selected ▾
  - Specify Contract(s): Type to search
  - \* Enable Geospatial Visual Analytics: Yes / No (selected)
- Custom Filters**
  - \* Race: Black or African American ▾ [Remove Filter]
  - Add Filter: - Select - ▾ [Add Filter]
- Display Options**
  - \* Select Section: HAB Core ▾
  - Break down by (select up to two): None selected ▾

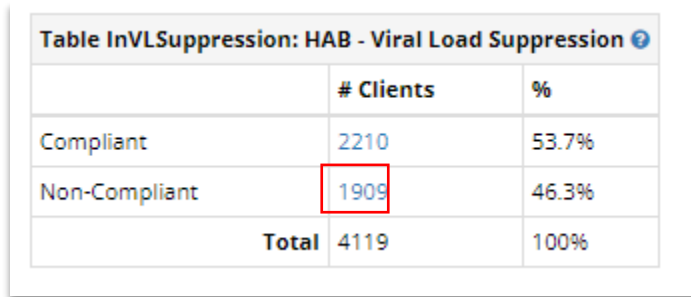
A blue "Run Report" button is located at the bottom center of the form.

Navigate through the *Section* tabs to get at the data you need. The data will display in graph and table form. You can export this to PDF or excel.



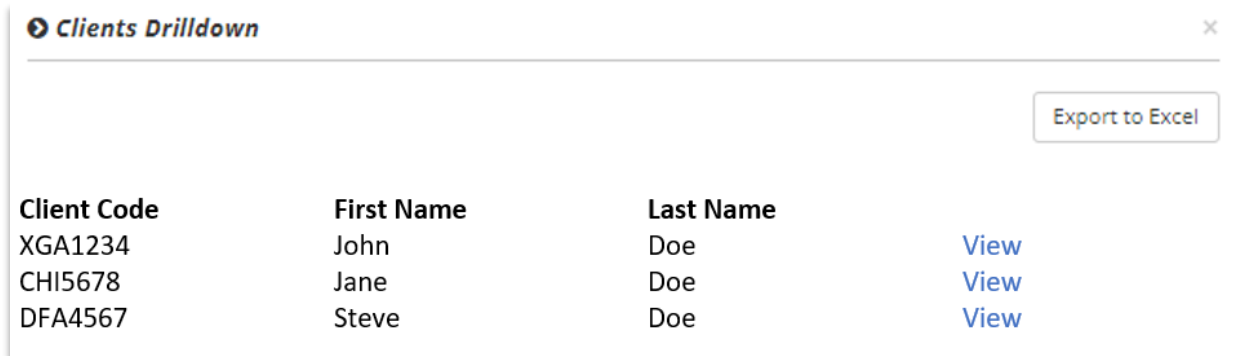
## Using the information for QA/QM

Another useful feature of e2Visual Analytics is the ability to export a list of clients that you can use for Quality Assurance or to obtain information on select populations. Selecting the blue hyperlinked number in the table will take you to a *Client Drilldown*.



	# Clients	%
Compliant	<a href="#">2210</a>	53.7%
Non-Compliant	<a href="#">1909</a>	46.3%
<b>Total</b>	4119	100%

The *Client Drilldown* gives you patient level information with their e2ID, first name, and last name. It allows you to export to excel or go directly into a patient's chart using the blue hyperlinks.





Client Code	First Name	Last Name	
XGA1234	John	Doe	<a href="#">View</a>
CHI5678	Jane	Doe	<a href="#">View</a>
DFA4567	Steve	Doe	<a href="#">View</a>

Some uses of this data are:

- Quality Assurance -- ensuring that patient charts are correct and up to date in e2fulton
- Quality Improvement -- identifying subpopulations for interventions

Please note: No patient identifying data was used in the making of this guide.

## Appendix A: List of HAB Performance Measures Available

This is a list of the current performance measures available as of 11/1/22. More measures will become available as they are validated. Data definitions are available by clicking the blue question mark  icon, and special notices regarding how to run measures are available by clicking the exclamation point icon .

### *Core Performance Measures*

- Viral Load Suppression\*
- Prescribed Antiretroviral Therapy\*
- Medical Visits Frequency\*
- Gap in Medical Visits\*
- Annual Retention in Care\*

### *All Ages Performance Measures*

- Influenza Immunization

### *Adolescent/Adult Performance Measures*

- Cervical Cancer Screening
- Chlamydia Screening
- Gonorrhea Screening
- Oral Exam
- Substance Abuse Screening
- Syphilis Screening

### *Oral Health Measures*

- Peridontal Screening or Examination

### *System Performance Measures*

- Housing Status

### *Archived Adolescent Adult Measures*

- ARV Therapy for Pregnant Women
- Adherence Assessment and Counseling
- Mental Health Screening

### *EMA Performance Measures*

- Engaged in Care
- Viral Load Suppression among Retained
- Viral Load Suppression among those Prescribed ART

\*These measures are available for further analysis and breakdowns in E2Visual Analytics.

## Appendix B: Display Sections in e2Visual Analytics

*Sections* allow you to report data. This document highlights commonly used tabs in each *Section*, although more are available than are listed here.

### *Client Intake Information*

Tab Name	Categories for data display
Age Group	<ul style="list-style-type: none"><li>• Less than 13</li><li>• 13 to 19</li><li>• 20 to 44</li><li>• 45 and older</li></ul> <p><b>Note:</b> This data displays the client's age as of the date the report is run. To get the most accurate age data, you must use the Age Range filter.</p>
Current Gender	<ul style="list-style-type: none"><li>• Male</li><li>• Female</li><li>• Transgender Male to Female</li><li>• Transgender Female to Male</li><li>• Transgender Other</li></ul>
Sex at Birth	<ul style="list-style-type: none"><li>• Male</li><li>• Female</li></ul>

### *Client Demographics*

Tab Name	Categories for data display
Ethnicity	<ul style="list-style-type: none"><li>• Hispanic or Latino/a</li><li>• Not Hispanic or Latino/a</li><li>• Unreported</li></ul>
Race	<ul style="list-style-type: none"><li>• White</li><li>• Black or African American</li><li>• Asian</li><li>• Native Hawaiian/Pacific Islander</li><li>• American Indian/Alaskan Native</li><li>• Other</li><li>• More than one selected</li><li>• Unreported</li></ul>

### *HIV Status*

Tab Name	Categories for data display
HIV Risk Factors	<ul style="list-style-type: none"><li>• Male to Male Sexual Contact (MSM)</li><li>• Injection Drug Use (IDU)</li><li>• Heterosexual contact</li><li>• Others including hemophilia, perinatal, etc.</li></ul>
HIV Status	<ul style="list-style-type: none"><li>• HIV negative</li><li>• HIV positive, not AIDS</li><li>• HIV positive, AIDS Status unknown</li><li>• CDC defined AIDS</li><li>• HIV indeterminate (infant less than 2 years only)</li></ul>

### *Income*

Tab Name	Categories for data display
Income Group	<ul style="list-style-type: none"><li>• Equal to or below Federal Poverty Line (FPL)</li><li>• 101-200% of FPL</li><li>• 201-300% of FPL</li><li>• 301-400% of FPL</li><li>• 401-500% of FPL</li><li>• Greater than 500% of FPL</li><li>• Unreported</li></ul>

### *Housing and Insurance*

Tab Name	Categories for data display
Housing Status	<ul style="list-style-type: none"><li>• Unstable</li><li>• Temporary</li><li>• Stable</li><li>• Unreported</li></ul>
Health Insurance Coverage	<ul style="list-style-type: none"><li>• Private-Employer</li><li>• Private-Individual</li><li>• Medicare</li><li>• Medicaid, CHIP, or other public plan</li><li>• VA, Tricare, and other military health care</li><li>• Indian Health Service</li><li>• Other</li><li>• Uninsured</li></ul>

## Medical

Tab Name	Categories for data display
ART Prescribed	<ul style="list-style-type: none"><li>• Yes</li><li>• No</li></ul> <p><b>Note:</b> If you have EHE funding, you will need this tab for your triannual report.</p>

## HAB Core

Only four performance measures are available in e2Visual Analytics. All others must be accessed through *HAB Performance Measures*.

- Viral Load Suppression
- Prescribed Antiretroviral Therapy (ART)
- Gap in Medical Visits
- Annual Retention in Care

These are listed as Compliant or Non-Compliant.

	# Clients	%
Compliant	<a href="#">2643</a>	55.1%
Non-Compliant	<a href="#">2150</a>	44.9%
<b>Total</b>	4793	100%

Pro Tip: Use the blue hyperlink to get information your non-complaint clients for QM activities/projects.

## Appendix C: Custom Filters & Breakdowns in e2Visual Analytics

The following reflect the most common filters and breakdowns, although more are available for use than listed here.

### *Client Demographics*

- **Ethnicity:** Hispanic or Latino/a, Non-Hispanic or Latino/a, Decline to Identify, Unreported/NA
- **Race:** White, Black or African American, Asian, Native Hawaiian/Pacific Islander, American Indian/Alaskan Native, Other, More than one selected, Unreported/NA
- **County (filters only):** Filters for client's county of residence

### *HIV Status*

- **HIV Risk Factors:** Male to Male Sexual Contact (MSM), Injection Drug Use (IDU), Hemophilia/coagulation disorder, Heterosexual contact, Receipts of blood transfusion, blood components or tissue, Perinatal transmission, Risk factor not reported or not identified, More than one selected
- **HIV/AIDS Status:** HIV negative, HIV positive, not AIDS, HIV positive, AIDS Status unknown, CDC defined AIDS, HIV indeterminate (infant less than 2 years only), Unreported/NA

### *Client Intake Information*

- **Age Group:** Less than 13, 13-19, 20-44, 45 and older, Unknown, Unreported/NA
  - **Note:** For the most accurate information, use [Age Range](#)
- **Current Gender:** Male, Female, Transgender Male to Female, Transgender Female to Male, Transgender Other, Unknown, Unreported/NA
- **Sex at Birth:** Male, Female, Unreported/NA

### *Housing and Insurance*

- **Housing Status:** Unstable, Temporary, Stable, Unreported
- **Medical Insurance:** Private-Employer, Private-Individual, Medicare, Medicaid, CHIP, or other public plan, VA, Tricare, and other military health care, Indian Health Service, Indian Health Service (IHS), Other Plan, No Insurance/Uninsured, Unreported/NA

### *Income (listed under Housing and Insurance for filters)*

- **Income Group:** Equal to or below Federal Poverty Line (FPL), 101-200% of FPL, 201-300% of FPL, 301-400% of FPL, 401-500% of FPL, Greater than 500% of FPL, Unreported/NA

### Medical (Filters Only)

- **Viral Load:** This allows you to run filter data for Viral Load at last test regardless of date filter. Use the drop-down menus to select the range. You can also select to include clients without Viral Loads or with undetectable Viral Loads.

The screenshot shows the 'Custom Filters' interface. It features two dropdown menus for 'Viral Load' with 'N/' selected in both. Between the dropdowns is the word 'and'. Below the first dropdown is a checkbox labeled 'Include clients without Viral Load tes'. Below the second dropdown is a checkbox labeled 'Include clients with undetectable Viral Loads'. A red 'Remove Filter' button is on the right. A help icon (?) is also present.

- **CD4 Count:** You can also run data for CD4 Counts at last test regardless of date filter. Use the drop-down menus to select the range. You can also include clients without CD4 tests.

### Age Range (Filters Only)

To get the most accurate age information, select *Age Range* under *Custom Filters*. Select *Add Filter*.

The screenshot shows the 'Custom Filters' interface with 'Age Range' selected. A dropdown menu is open, showing options: '- Please Select -', 'Age Between (inclusive)', 'Born Between Dates (inclusive)', 'Age >=', 'Age <=', 'Born on or after date', and 'Born on or before date'. The 'Add Filter' button is visible.

Rather than putting in the age as a number, select one of the options that allow you to input an exact date:

- *Born Between Dates (inclusive)*
- *Born on or after date*
- *Born on or before date.*

The screenshot shows the 'Custom Filters' interface with 'Age Range' selected and 'Born Between Dates (incl)' chosen. The filter is set to 'Between' with dates '03/01/2003' and '02/28/2009'. Below the filter, it displays '(Ages 13 years 3 months 27 days to 19 years 3 months 26 days.)'. A red 'Remove Filter' button is on the right.

This will allow you to get the client's age information as of the **reporting date**. See Table 1 for the reference table for the date ranges in FY22 and Table 2 for the date ranges in Calendar Year 2022.

Table 1: Date Ranges for one year look back, FY22

Age Range	FY22 Q1 (as of 5/31/22)	FY22 Q2 (as of 8/31/22)	FY22 Q3 (as of 11/30/22)	FY22 Q4 (as of 2/28/23)
Less than 13	<b>Born on or after:</b> 6/1/2009	<b>Born on or after:</b> 9/1/2009	<b>Born on or after:</b> 12/1/2009	<b>Born on or after:</b> 3/1/2010
13-18	<b>Born between dates:</b> 6/1/2003 <b>and:</b> 5/31/2009	<b>Born between dates:</b> 9/1/2003 <b>and:</b> 8/31/2009	<b>Born between dates:</b> 12/1/2003 <b>and:</b> 11/30/2009	<b>Born between dates:</b> 3/1/2004 <b>and:</b> 2/28/2010
19-24	<b>Born between dates:</b> 6/1/1997 <b>and:</b> 5/31/2003	<b>Born between dates:</b> 9/1/1997 <b>and:</b> 8/31/2003	<b>Born between dates:</b> 12/1/1997 <b>and:</b> 11/30/2003	<b>Born between dates:</b> 3/1/1998 <b>and:</b> 2/29/2004
25-34	<b>Born between dates:</b> 6/1/1987 <b>and:</b> 5/31/1997	<b>Born between dates:</b> 9/1/1987 <b>and:</b> 8/31/1997	<b>Born between dates:</b> 12/1/1987 <b>and:</b> 11/30/1997	<b>Born between dates:</b> 3/1/1988 <b>and:</b> 2/28/1998
35-44	<b>Born between dates:</b> 6/1/1977 <b>and:</b> 5/31/1987	<b>Born between dates:</b> 9/1/1977 <b>and:</b> 8/31/1987	<b>Born between dates:</b> 12/1/1977 <b>and:</b> 11/30/1987	<b>Born between dates:</b> 3/1/1978 <b>and:</b> 2/29/1988
45-54	<b>Born between dates:</b> 6/1/1967 <b>and:</b> 5/31/1977	<b>Born between dates:</b> 9/1/1967 <b>and:</b> 8/31/1977	<b>Born between dates:</b> 12/1/1967 <b>and:</b> 11/30/1977	<b>Born between dates:</b> 3/1/1968 <b>and:</b> 2/28/1978
55-64	<b>Born between dates:</b> 6/1/1957 <b>and:</b> 5/31/1967	<b>Born between dates:</b> 9/1/1957 <b>and:</b> 8/31/1967	<b>Born between dates:</b> 12/1/1957 <b>and:</b> 11/30/1967	<b>Born between dates:</b> 3/1/1958 <b>and:</b> 2/29/1968
65+	<b>Born on or before:</b> 5/31/1957	<b>Born on or before:</b> 8/31/1957	<b>Born on or before:</b> 11/30/1957	<b>Born on or before:</b> 2/28/1958
24 -35	<b>Born between dates:</b> 6/1/1986 <b>and:</b> 5/31/1998	<b>Born between dates:</b> 9/1/1986 <b>and:</b> 8/31/1998	<b>Born between dates:</b> 12/1/1986 <b>and:</b> 11/30/1998	<b>Born between dates:</b> 3/1/1987 <b>and:</b> 2/28/1999

Table 2: Date Ranges for one year look back, Calendar Year 2022

Age Range	FY22 Q4 (as of 2/28/23)
Less than 13	<b>Born on or after:</b> 1/1/2010
13-18	<b>Born between dates:</b> 1/1/2004 <b>and:</b> 12/31/2009
19-24	<b>Born between dates:</b> 1/1/1998 <b>and:</b> 12/31/2003
25-34	<b>Born between dates:</b> 1/1/1988 <b>and:</b> 12/31/1997
35-44	<b>Born between dates:</b> 1/1/1978 <b>and:</b> 12/31/1987
45-54	<b>Born between dates:</b> 1/1/1968 <b>and:</b> 12/31/1977
55-64	<b>Born between dates:</b> 1/1/1958 <b>and:</b> 12/31/1967
65+	<b>Born on or before:</b> 12/31/1957