

# **EQUIPP® ANALYTICS**

## **Walkthrough**



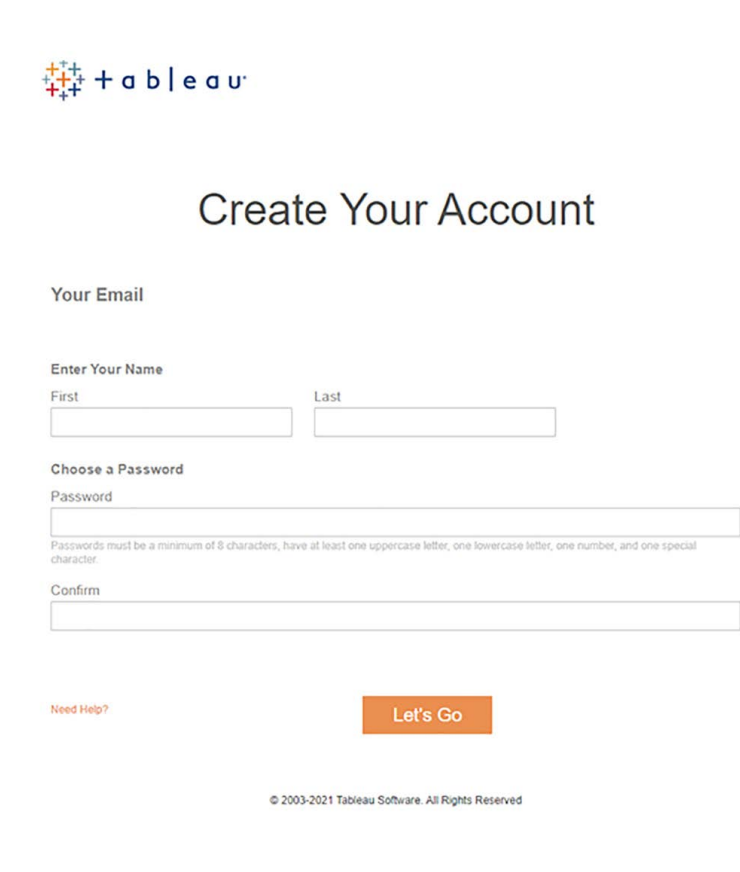
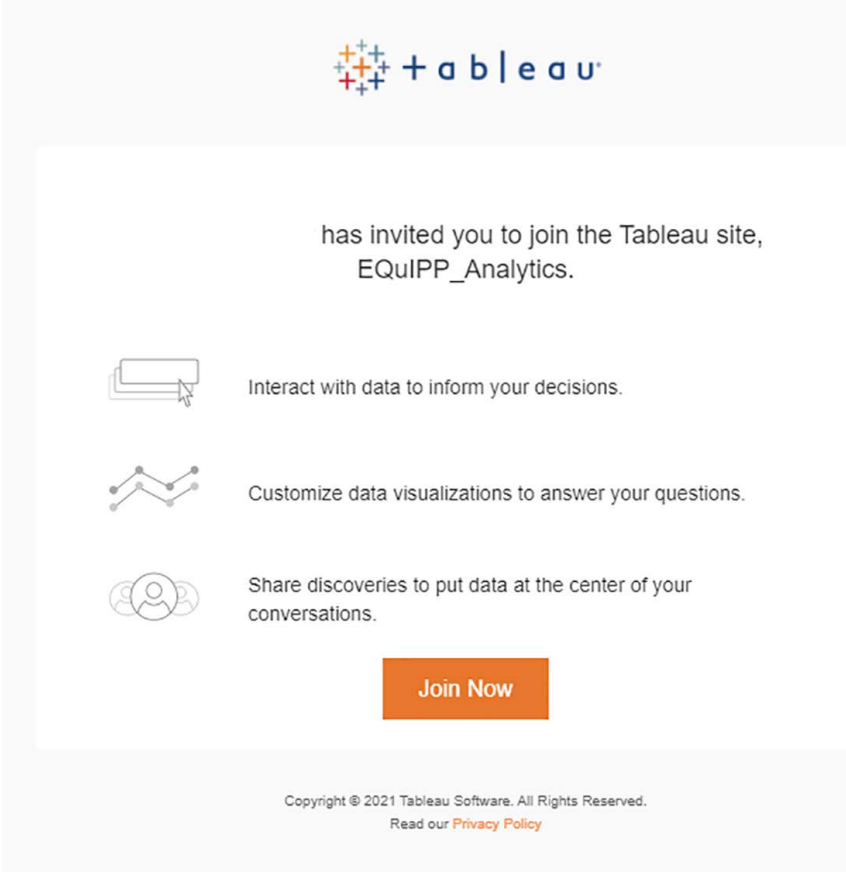
# Table of Contents

First Time Log in Directions	<a href="#"><u>3</u></a>
Returning Log in Instructions	<a href="#"><u>6</u></a>
Dashboard Dictionary	<a href="#"><u>7</u></a>
Navigation to Dashboards	<a href="#"><u>9</u></a>
Using Dashboard filters	<a href="#"><u>11</u></a>
Custom Views and Dashboard Subscriptions	<a href="#"><u>12</u></a>
Creating Saved Dashboard Views	<a href="#"><u>12</u></a>
Subscribing to a Dashboard	<a href="#"><u>13</u></a>
Managing Your Subscriptions and Saved Dashboard Views	<a href="#"><u>15</u></a>
Downloading Data from Your Dashboards	<a href="#"><u>16</u></a>

# First Time Log-in Instructions

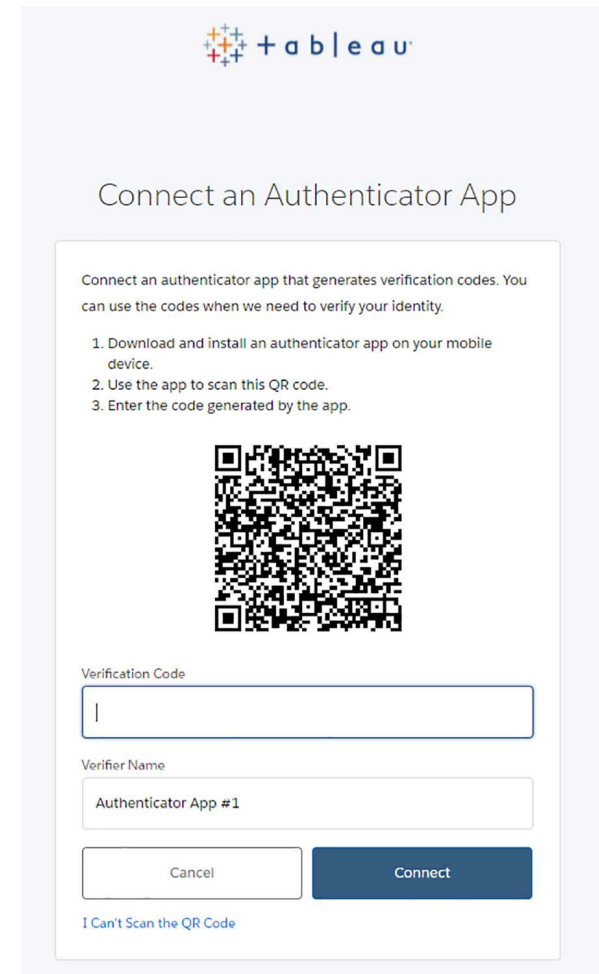
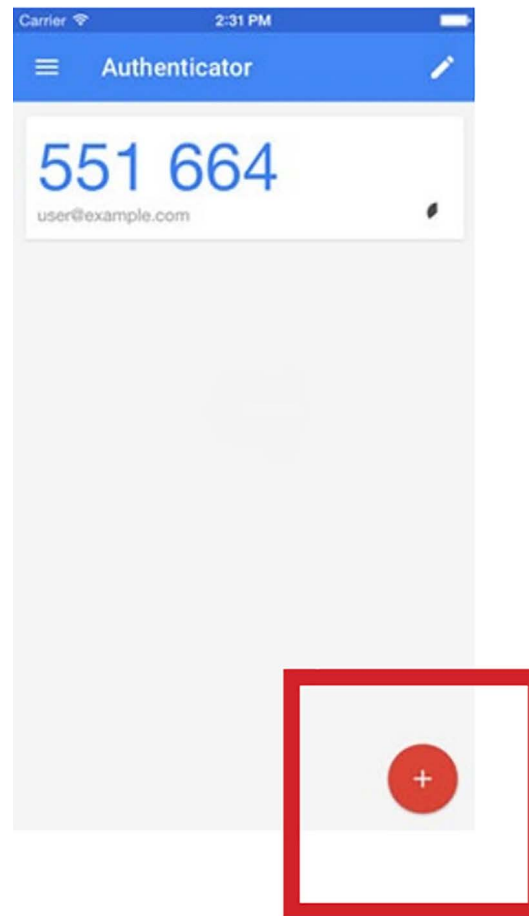
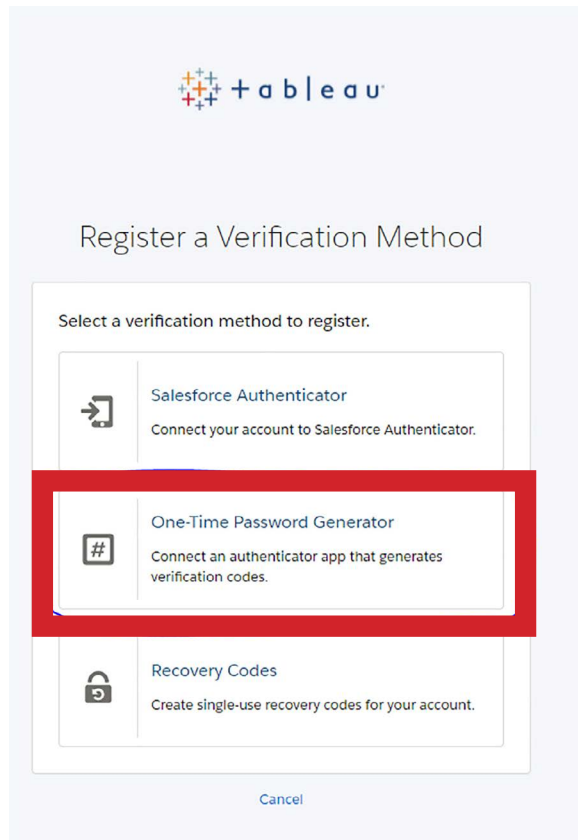
1. Click on “Join Now” from invitation email.

2. Fill in all the fields to create your account and click “Let’s Go.”



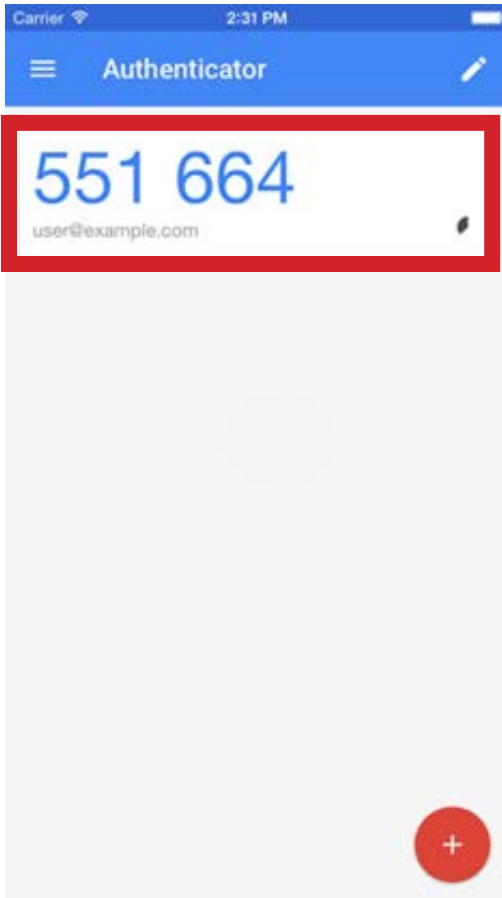
# First Time Log-in Instructions

3. Select the One-Time Password Generator option.
4. Download and install the Google Authenticator App on your mobile device.
5. Once inside the app, click the '+' sign then scan the QR code located in Tableau Online.



## First Time Log-in Instructions

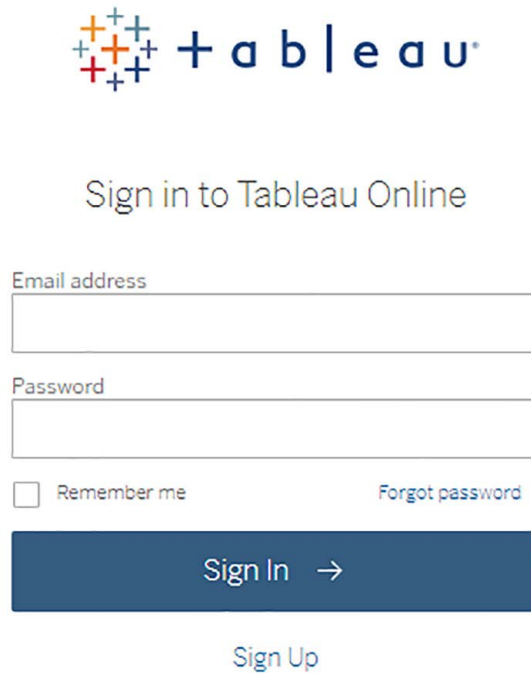
6. Use the authenticator app and enter in the code from the app into the verification code box to sign in.



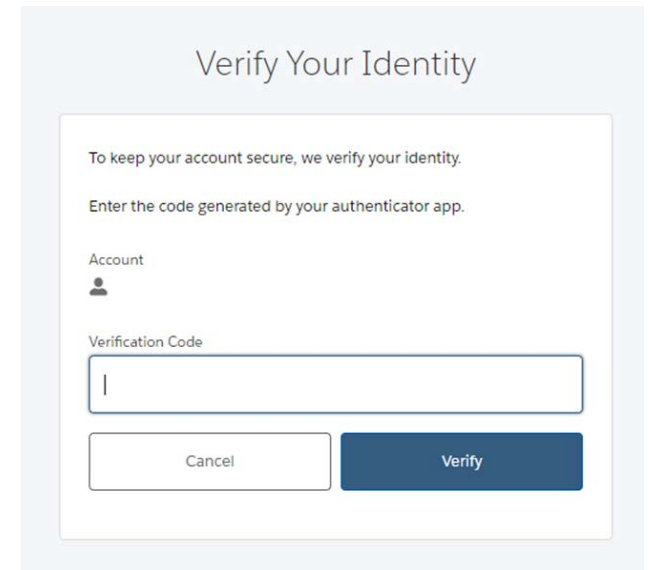
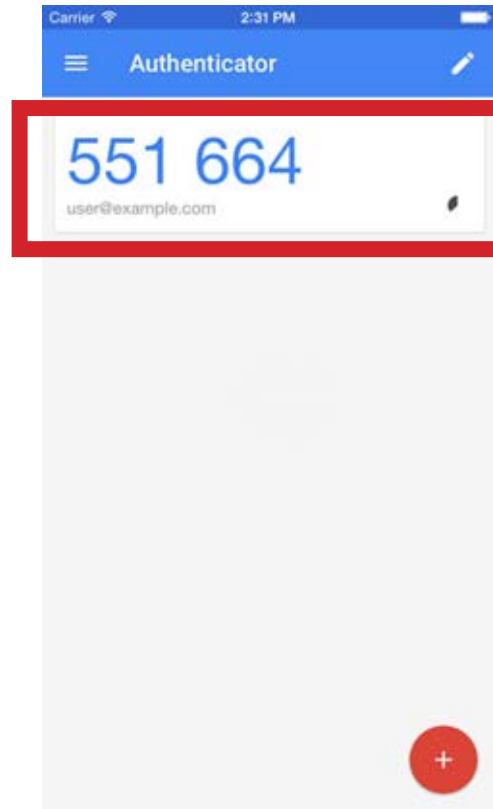
7. Once you have clicked verify, you will be logged in to EQUIPP Analytics.

# Returning Log-in Instructions

1. Navigate to [equippanalytics.pharmacyquality.com](http://equippanalytics.pharmacyquality.com)
2. Enter your username and password.
3. Open the google authenticator app, and enter the verification code where prompted on the log-in page.
4. Click 'Verify' to log in.



The image shows the Tableau Online sign-in page. At the top left is the Tableau logo, consisting of a cluster of plus signs in various colors followed by the word "tableau" in a blue sans-serif font. Below the logo is the text "Sign in to Tableau Online". There are two input fields: "Email address" and "Password". Below the "Email address" field is a "Remember me" checkbox and a "Forgot password" link. At the bottom is a large blue "Sign In →" button and a "Sign Up" link.



The image shows a "Verify Your Identity" form. The title is "Verify Your Identity". Below the title is a message: "To keep your account secure, we verify your identity. Enter the code generated by your authenticator app." There is an "Account" section with a user icon. Below that is a "Verification Code" input field. At the bottom are two buttons: "Cancel" and "Verify".

# Dashboard Dictionary

**Dashboard** – A series of data visualizations that are located on a page. By using filters, dashboards are interactive and allow you to view just the data that you want, with all of the visualizations on the dashboard adjusting to reflect the filter you have selected.

**Dashboard Filter** - Filters appear at the top of the dashboard and allow users to change the data behind dashboard elements.

**EQUIPP® Average**- Based only on the Medicare patients evaluated in EQUIPP®, this is the performance score for all data in the selected measurement period (i.e.,  $(\text{Total number of patients meeting the measure intended}) / (\text{Total number of patients eligible for the measure}) = \text{XX.XX\%}$ ) (Calculated with all of the data for each measure, with all programs included.)

**Top 20%**- Based on Medicare patients only, top 20th percentile of all pharmacies that have a denominator that is 10 patients or greater in the selected measurement period. (Calculated with all of the data for each measure, with all programs included.)

**Percent Above EQUIPP® Average**- Percent of stores that have a score greater than the EQUIPP® Average

**Percent Above Top 20%**- Percent of stores that have a score greater than the Top 20%

**Program Goal**- Goal set by the data provider (the health plan or pharmacy benefit manager) to display in EQUIPP®. This will also appear in the “Quality Improvement Program” table found in your EQUIPP dashboard.

**Estimated Outliers/Outliers** - Number of patients that are non-adherent for that measure. (Denominator minus Numerator = Estimated Outliers)

**NPI Count/Store Count**- Number of pharmacies that have at least one patient included in the measure

**Numerator**- Number of patients that met the intent of the measure for the selected measurement period (in terms of adherence measures, the patients who achieved a PDC rate at or above 80% in the selected measurement period)

**End Anchor Date/End of Period Date/ End Date** – The most recent date to be included in the data that is showing. (Example: June 2021 as End Date and Performance Period as YTD will show all of the data from January 2021 – June 2021.)

**Performance Period** – Determines if the data shown will be the year-to-date (YTD) data or the previous 6-month's (6M) data.

## Dashboard Dictionary Continued

**Measure Name** – Filter allows you to select the adherence Measure/Measures that you want to view the data for in the dashboard

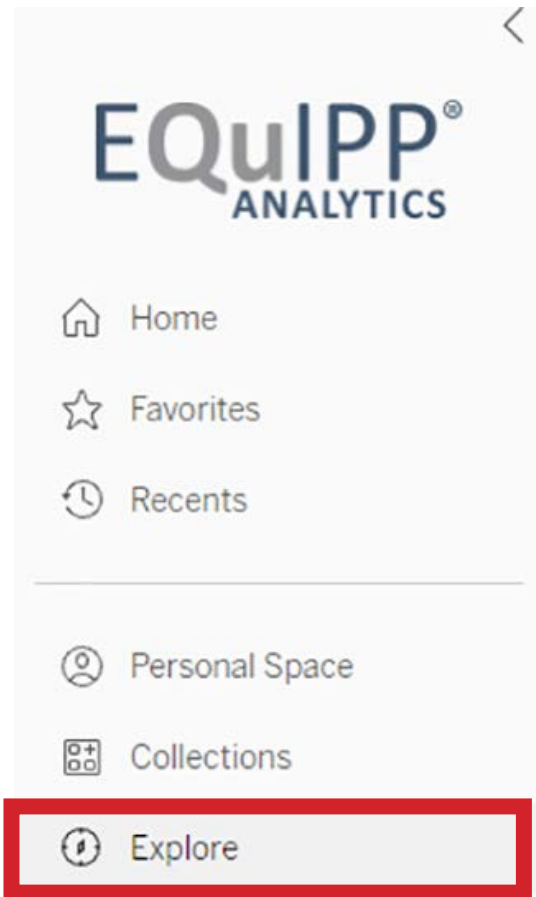
**Program ShortName** - Filter allows you to select the Quality Improvement Program/Programs that you want to view the data for in the dashboard.

**Patients Needed to Reach Goal Score** – The number of patients needed that are adherent for the measure in order to bring the Score (%) to the program's goal score.

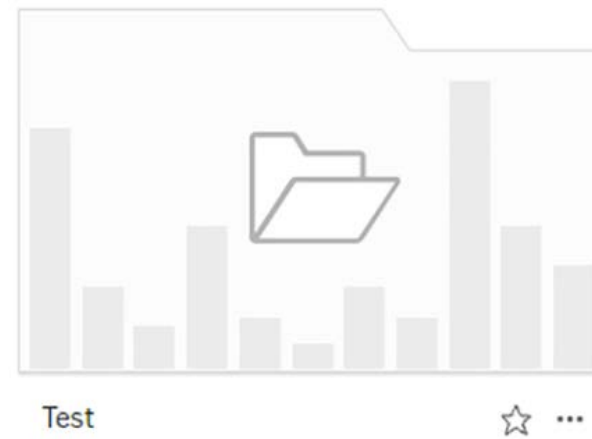


# Navigation to Dashboards

1. On the left side of EQUIPP® Analytics, select the Explore Tab.

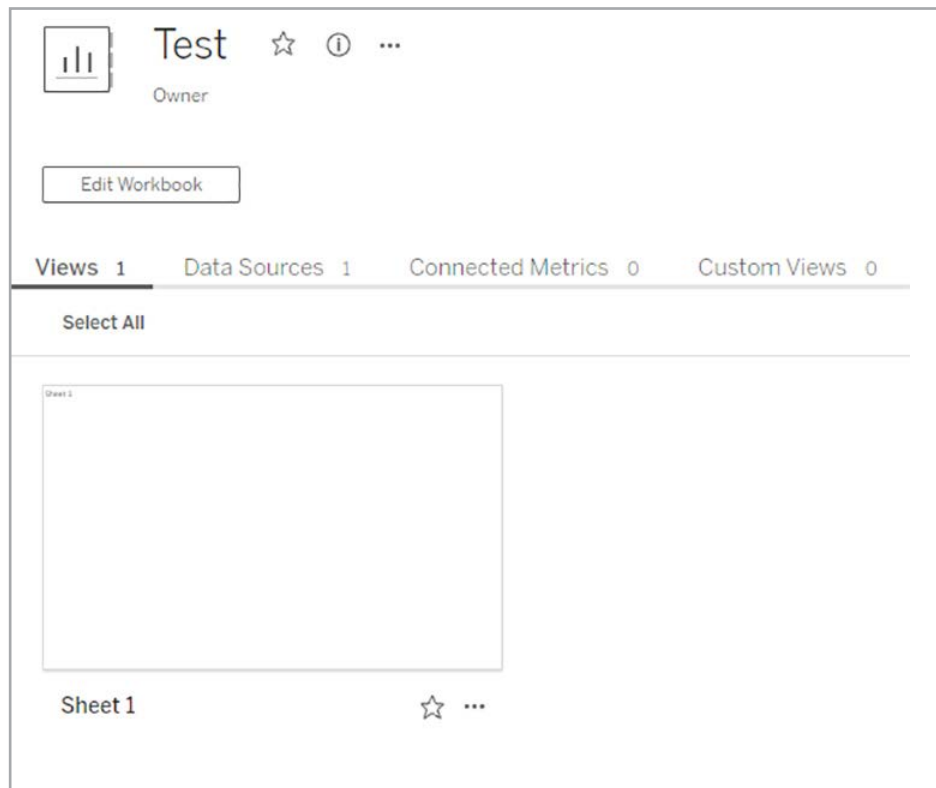


2. Once in the Explore tab, click on the folder with your organization's name.



## Navigation to Dashboards

3. Once inside the folder, click on the dashboard that you would like to view.
4. This view will show you any subscriptions or created views based on the dashboard in the tabs above. To view the dashboard itself, click on the dashboard on the main page. To navigate to a specific view, click on the custom views tab above the dashboard.

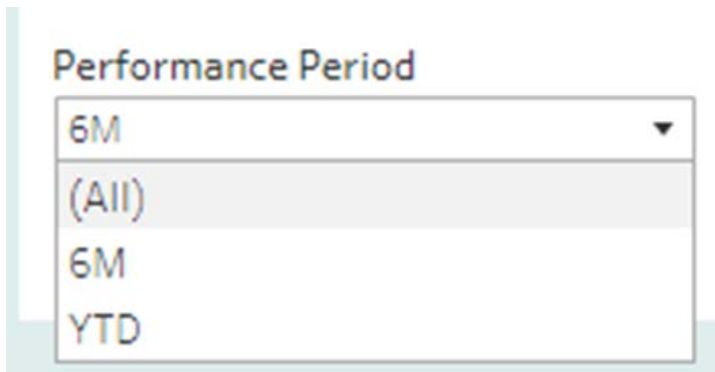


## Using Dashboard Filters

1. To use a slider filter, click on the circle and drag the filter to the desired value. Also, you may navigate the filter using the left and right arrows to adjust the filter value.



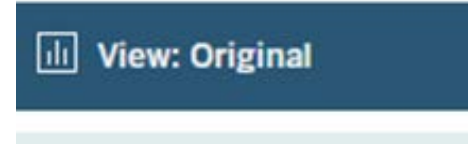
2. To edit a dropdown filter, click the drop down arrow on the right side of the filter. This will provide the options to choose from. Next, select the desired option and the visualizations will adjust accordingly. (Note: make sure that you have only the desired option selected. Previously selected options may stay highlighted until they are deselected.)



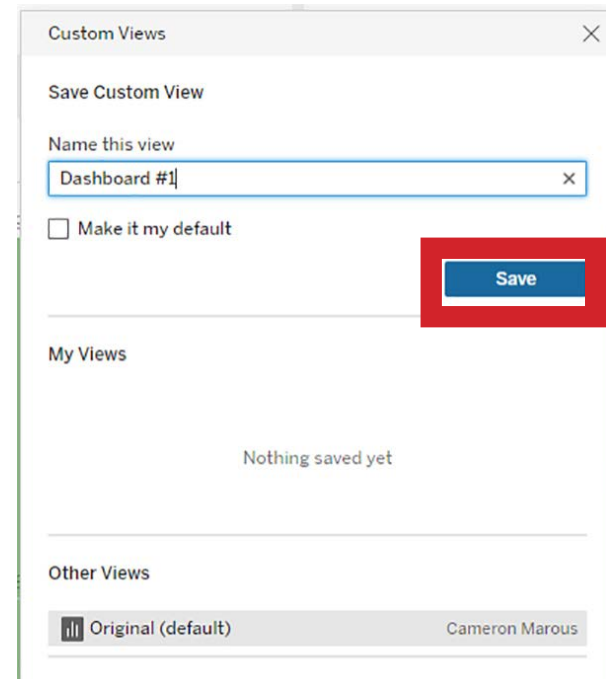
# Custom Views and Dashboard Subscriptions

## Creating Saved Dashboard Views

1. Open the dashboard you want to subscribe to in the 'Explore' tab.
2. Adjust the filters to show the desired data.
3. Click on the View button on the top left of the dashboard.

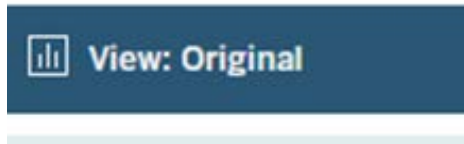


4. Name your custom view.
  - a. If you would like to make this view the default for when you open the dashboard, check the 'Make it my default' box.
  - b. If you would like this view to be seen by other members of your organization who have access to EQUIPP Analytics, check the 'Make visible to others' box.

A screenshot of a "Custom Views" dialog box. The dialog has a title bar with a close button. Below the title bar is the section "Save Custom View". It contains a text input field with the value "Dashboard #1" and a close button on the right. Below the input field is a checkbox labeled "Make it my default" which is currently unchecked. To the right of the checkbox is a blue "Save" button, which is highlighted with a red rectangular box. Below the "Save Custom View" section is a section titled "My Views" which currently contains the text "Nothing saved yet". At the bottom of the dialog is a section titled "Other Views" which contains a single entry: a bar chart icon, the text "Original (default)", and the name "Cameron Marous".

# Subscribing to a Dashboard

1. Open the dashboard you want to subscribe to in the 'Explore' tab.
2. Adjust the filters to show the desired data.
3. Click on the View button on the top left of the dashboard.

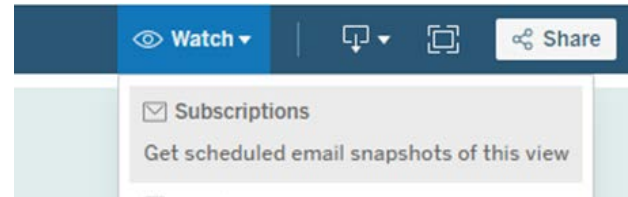


4. Name your custom view and then click save.

A dialog box titled "Custom Views" with a close button (X) in the top right corner. The dialog is divided into sections. The first section is "Save Custom View", which contains a text input field with the text "Dashboard #1" and a close button (X) on the right. Below the input field is a checkbox labeled "Make it my default". To the right of the checkbox is a blue "Save" button, which is highlighted with a red rectangular border. The second section is "My Views", which contains the text "Nothing saved yet". The third section is "Other Views", which contains a single view entry: a bar chart icon, the text "Original (default)", and the name "Cameron Marous".

## Subscribing to a Dashboard

5. Click on the 'watch' dropdown at the top right of dashboard, then select subscribe.



- a. Add users to send report to or share with yourself
- b. Include: This view
- c. Format: PDF
- d. Size: Unspecified
- e. Orientation: Portrait
- f. Subject: Will be the email subject when report is sent
- g. Message: Message added to email when sent

 A screenshot of a 'Subscribe' dialog box. It has a title bar with a close button. The content includes:
 

- 'Subscribe Users' section with a text input field 'Type to add users or groups'.
- A checkbox for 'Subscribe me'.
- 'Include' section with a dropdown menu set to 'This View' and a checkbox for 'Don't send if view is empty'.
- 'Format' section with a dropdown menu set to 'Image'.
- 'Subject' section with a text input field containing 'Dashboard 1 Subscription'.
- 'Message (Optional)' section with a text input field containing 'Add a custom message'.
- 'Frequency' section with a dropdown menu set to 'On Selected Schedule'.
- 'Schedule' section with a dropdown menu set to '1 day a week, at 13:40'.
- At the bottom, there is a 'Manage Subscriptions' link and 'Cancel' and 'Subscribe' buttons.

- h. Frequency & Schedule of subscription
  - Select the frequency you would like to receive the subscribed view.
- i. Click subscribe.

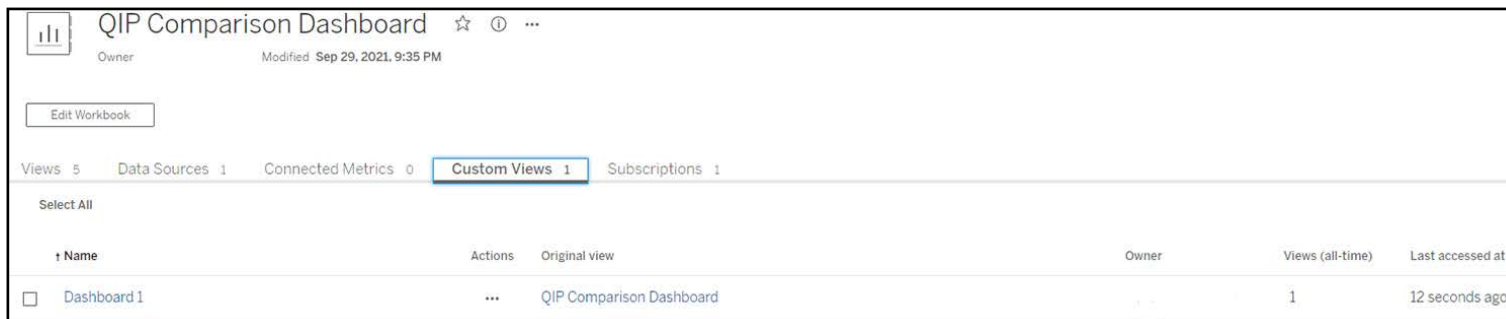
 A screenshot of a 'Schedule' dialog box. It has a title bar with a close button. The content includes:
 

- 'Schedule' section with a dropdown menu set to '1 day a week, at 13:40'.
- 'Repeats' section with a dropdown menu set to 'Daily'.
- 'Every' section with a dropdown menu set to 'Day'.
- 'At' section with a dropdown menu set to '13:40'.
- 'On' section with a row of day selection buttons: Su, M, T, W, Th, F, Sa. The 'F' button is highlighted.
- 'Time zone' section with text '(UTC-05:00) America/New\_York'.
- At the bottom, there is a 'Manage Subscriptions' link and 'Cancel' and 'Subscribe' buttons.

6. You have now subscribed to receive the dashboard as a report. It is emailed to you (and other users who you added) at the scheduled time.

# Managing Your Subscriptions and Saved Dashboard Views

1. From the explore tab, navigate to the dashboard you would like to manage the views/subscriptions for.
2. Once you have clicked on the dashboard, you will see the subscriptions and custom views tabs that are highlighted in the visual below. Click on the desired option.
  - a. In the 'custom views' tab, you will be able to see all of the custom views that you have created and navigate directly to them.
  - b. In the 'Subscriptions' tab, you are able to see all subscriptions you have made. You can also edit the subscriptions in this tab by selecting the 3 dot icons that are highlighted below.

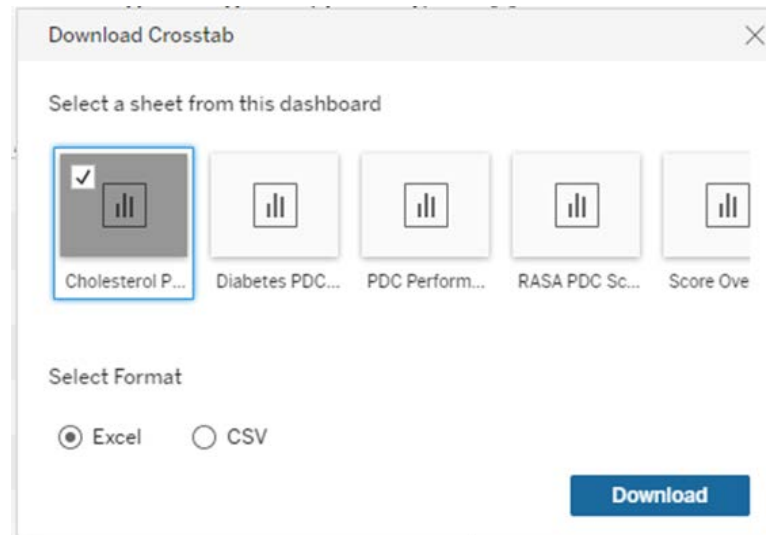
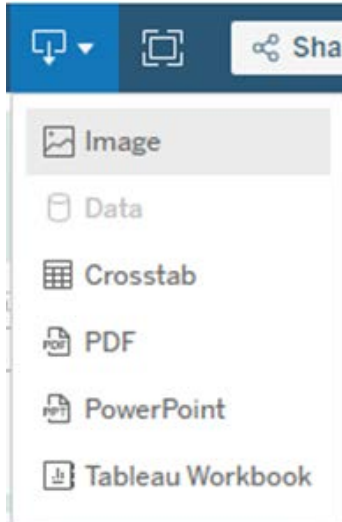


The screenshot shows the 'QIP Comparison Dashboard' interface. At the top, there is a title bar with a bar chart icon, the dashboard name 'QIP Comparison Dashboard', a star icon, a refresh icon, and a menu icon. Below the title bar, it says 'Owner' and 'Modified Sep 29, 2021, 9:35 PM'. There is an 'Edit Workbook' button. Below that, there are navigation tabs: 'Views 5', 'Data Sources 1', 'Connected Metrics 0', 'Custom Views 1' (which is highlighted with a blue border), and 'Subscriptions 1'. Below the tabs, there is a 'Select All' link. The main content area is a table with the following columns: 'Name', 'Actions', 'Original view', 'Owner', 'Views (all-time)', and 'Last accessed at'. The table contains one row with the following data: 'Dashboard 1', a three-dot menu icon, 'QIP Comparison Dashboard', a user icon, '1', and '12 seconds ago'.

Name	Actions	Original view	Owner	Views (all-time)	Last accessed at
<input type="checkbox"/> Dashboard 1	...	QIP Comparison Dashboard		1	12 seconds ago

# Downloading Data from Your Dashboards

1. On the top right of your dashboard, click the download icon.
2. Select the 'Crosstab' option from the dropdown menu.
3. Choose which visual you would like to download the data from, and choose the format you would like to download the data.
4. Click download.



Questions? Please contact [support@pharmacyquality.com](mailto:support@pharmacyquality.com) and copy your organization's account manager.