Business Reports

ARUP Connect®

User Manual

November 2015

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ARUP Laboratories
500 Chipeta Way, Salt Lake City, Utah 84108
November 2015 Ver. 2.6

Business Reports

Business Reports is a web-based application that makes multiple business reports directly available to ARUP clients. Clients may create instant reports and set up scheduled reports using the options available here.

To access this report function, a client must have an account set up for ARUP Connect and must be assigned access to the **Business Reports application**.

1. Log in to ARUP Connect using your user name and password.
   Note that ARUP Connect login/logout and inactivity timeout rules all apply to this application.

2. At the main screen select menu option Business Reports.

The **My Report** page is displayed. Click on tabs to perform the desired functions:

My Reports:	View reports.
Make Report:	Set up instant and scheduled reports.
Manage Groups:	Set up client groupings for purposes of combining clients within a report.

Quick Reference

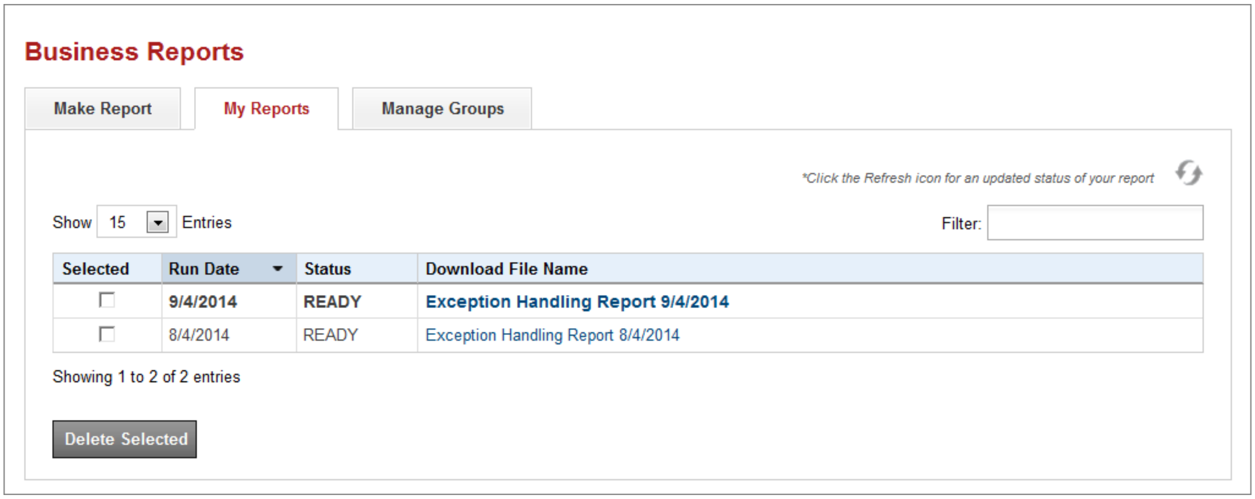
Click this link to print a one-page Quick Reference Guide: Quick Reference Guide

View Reports

My Reports Tab

The default tab is the My Reports tab. After a report has generated, the report is posted to the list in the **My Reports** tab. Reports that have not yet been viewed display in bold.

After 30 days, you will receive an Email notifying you that a report in the My Reports tab is scheduled for deletion. After 60 days, the report will be deleted.



Open a Report

1. Click the report link when a report shows a status of Ready.

Selected	Run Date	Status	Download File Name
☐	9/4/2014	READY	Exception Handling Report 9/4/2014

The File Download dialog appears.

2. Click **Open**.

Save a Report

1. Click the report link when a report shows a status of Ready.
The File Download dialog appears.

2. Click **Save** to save the file.

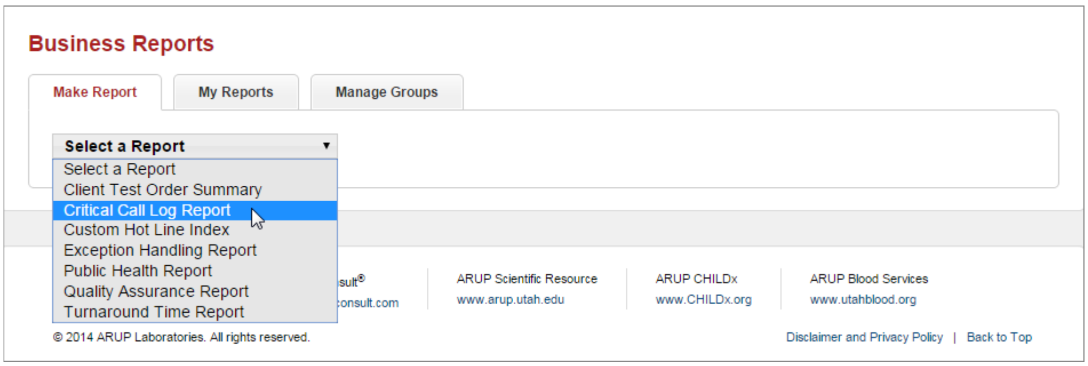
Modify My Reports Screen

	Refresh. If a report shows a status of Pending, click the button to refresh the display.
Show 15 Entries	Use the drop-down list to select the number of reports to display.
Filter:	You can filter the list to display a shorter list of reports. Enter all or part of a run date, status, or file name in the box.
Status	**PENDING**. Report has not been run yet. Click to refresh the display. If the status remains Pending, wait a few minutes and try the refresh again. Data updates occur every few minutes.
	READY. If the report is ready for download, its status will change to Ready and the report name will become a link. Reports that have not yet been viewed display in bold.
Delete Selected	Use to delete reports from the list. Activate the check box for that report under the Selected column and then click **Delete Selected**.
Sorting	To sort the list, click on a column heading. An arrow in the sorted column will indicate whether the list is sorted in ascending or descending order. Click on the column heading again to reverse the sort order. 

Make Reports

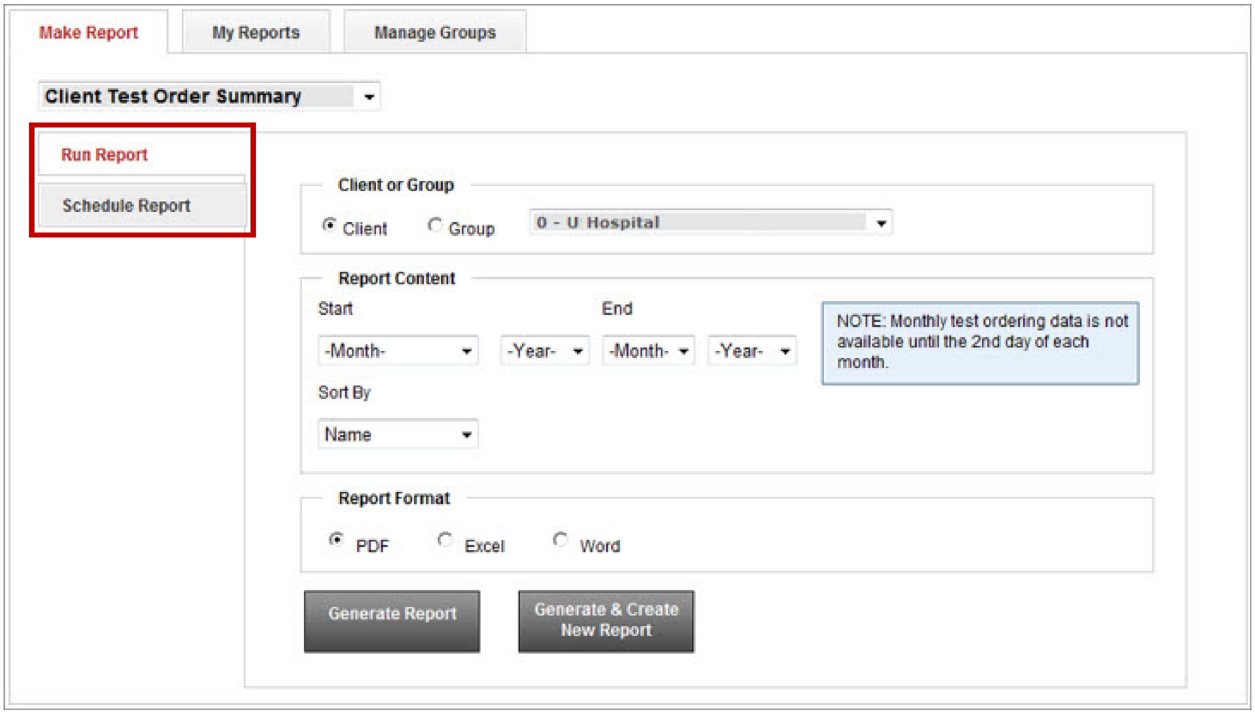
Make Report Tab Overview

Use the drop-down arrow to select the report you want to run. Click here for additional information on the available reports.



After selecting a report, you will see two tabs.

- Choose the Run Report tab to generate reports immediately.
- Choose the Schedule Report tab to setup and schedule reports.



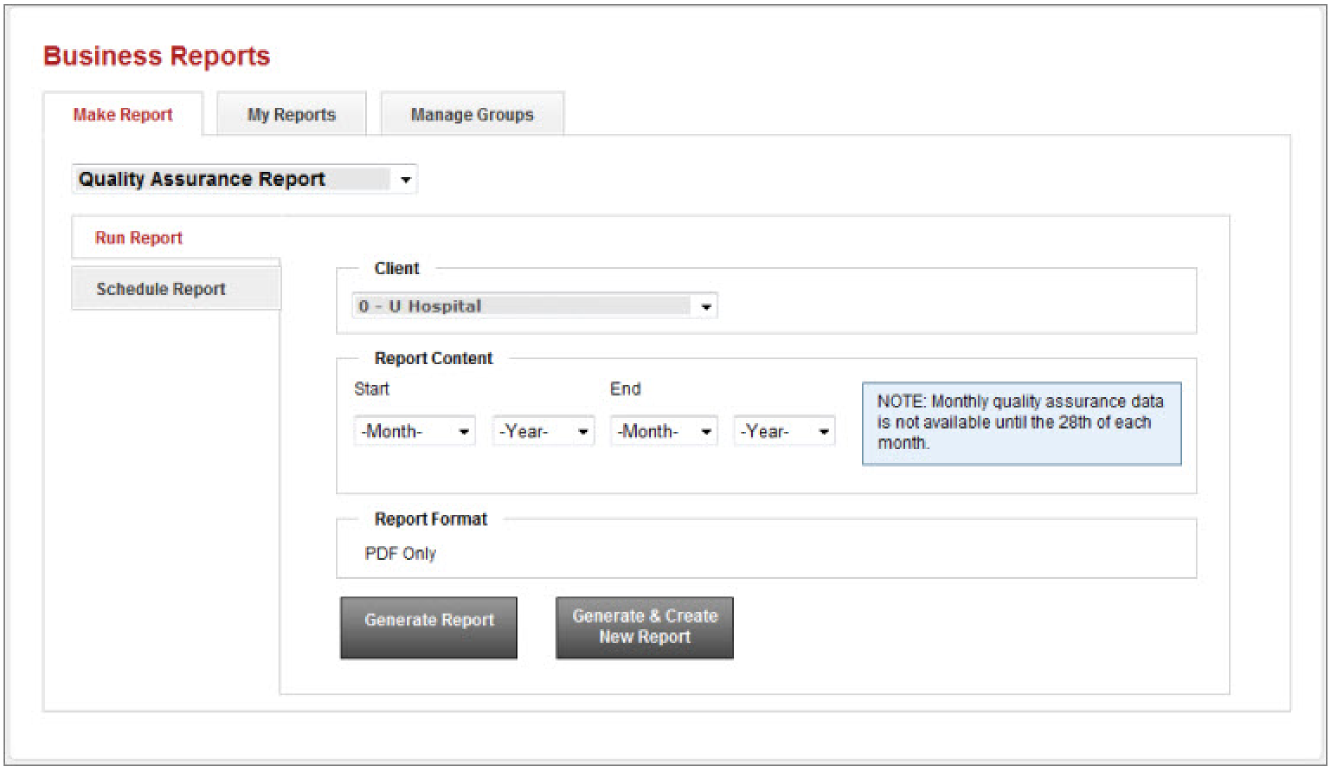
Run Report Side Tab

Select the Run Report side tab to generate a report immediately.

Run a Report

1. Activate Client or Group, if applicable, then select a client or group from the drop-down list.
2. Select the report date range.
   OR
   Select the Month (for Hot Line Index only)
3. Select sort order (for Client Test Order Summary only).
4. Select the format for your report.
5. Click **Generate Report** or **Generate & Create New Report**. The Report Name dialog is displayed. Use the default or change the name of the report, as needed.
6. Click **OK**.

Example:



Run Report Parameters

Select Client or Group	**Client**. The drop-down list will show only your Clients.
	Group. The drop-down list will show only your Groups. Applicable for Client Test Order Summary only.
Select Report Content	**Start Month/Year**. The starting month/year to be included in the report. The report will include the history between and including the months you select.
	End Month/Year. The ending month/year to be included in the report. The report will include the history between and including the months you select. Not applicable for Exception Handling Report. **Note**: When including both starting and ending dates in the report, the report will include the history between and including the months you select. For example, if October 2010 is selected for the starting date and December 2010 is selected for the ending date, the report will include three months of history for October through December 2010.

	Daily/Weekly/Monthly. Select Daily, Weekly, or Monthly for the amount of time to be included in the report. The corresponding date fields open to set up the appropriate start and/or end dates.
	Report Type. Select **Brief** or **Detailed** depending on the amount of content you want included in the report.
Select Report Format (Not all formats are available for all reports)	**PDF**. The Report will be in a PDF format.
	Excel. The report will be in an Excel format.
	Word. The report will be in a Microsoft Word format.
Generate Report	The report will be generated and saved to the My Reports tab. The **My Reports** tab will open.
Generate & Create New Report	The report will be generated and then saved to the My Reports tab for retrieval later. The **Make Report** tab will remain open.

Report Name Dialog

A default name is entered for the report name. You can keep the default name or delete it and enter a new name. The Maximum length of the report name is 50 characters.

Click **OK** to run the report.

Schedule Report Side Tab

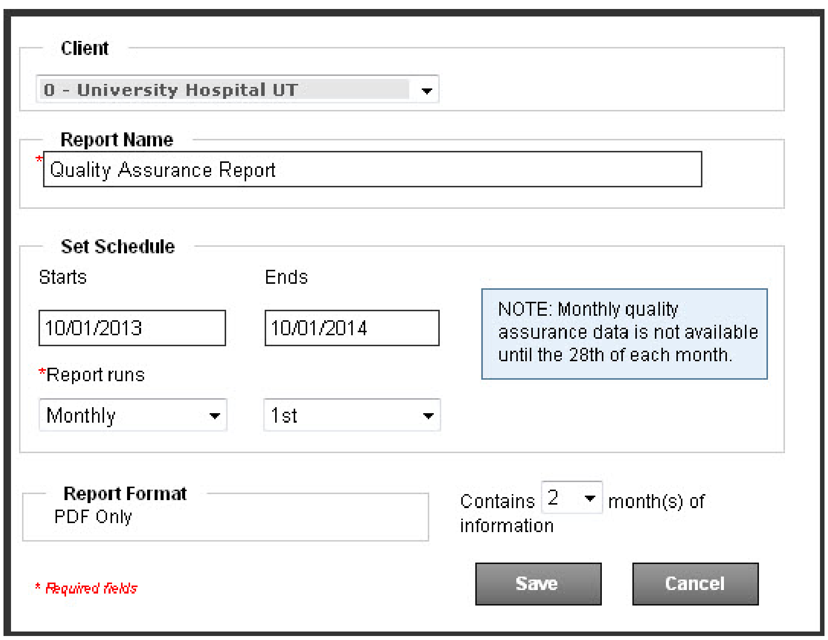
Select the Schedule Report side tab to set up a recurring report or view/edit reports scheduled to run at a later date.

Schedule a Recurring Report

1. Click **Create New Schedule**.
2. Activate **Client** or **Group**, if applicable, then select a client or group from the drop-down list.

3. Select the number of months to include in the report (not applicable for Exception Handling Report).
4. Select the sort order (for Client Test Order Summary only).
5. Enter the name of the report.
6. Activate the check box if you want to receive an email when the report is ready in **My Reports**.
7. Select the frequency the report runs (monthly, for example).
8. Select the day of the month the report will run on.
   Note that the date report data is available for a given month varies based on the report.
9. Select the starting date for the schedule.
10. Select the ending date for the schedule or leave this field blank to allow the report to run indefinitely.
11. Select the format for your report.
12. Click **Save**.
    The new scheduled report will appear in the list.

Example:



Schedule Report Parameters

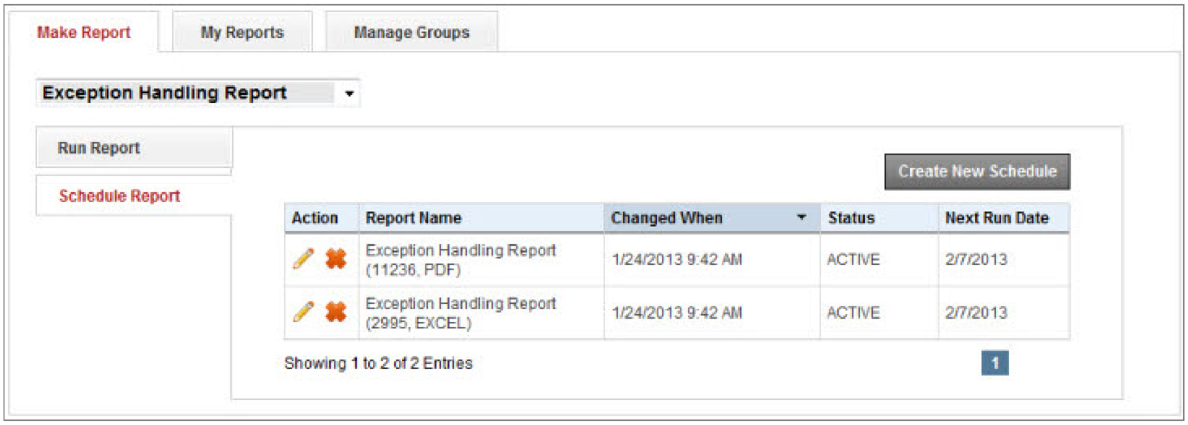
Client or Group	Client. The drop-down list will show only your Clients.

	Group. The drop-down list will show only your Groups. Applicable for Client Test Order Summary only.
Report Name	A default name is entered for the report name. You can keep the default name or delete it and enter a new name. Maximum length of the report name is 50 characters.
Set Schedule	**Starts**. Select the starting date for the schedule.
	Ends. Select the ending date for the schedule, or leave this field blank to allow the report to run indefinitely.
	Report runs __. Select the frequency of the report and the date for the report to run. Cannot be changed for Exception Handling Report.
Select Report Format (Not all formats are available for all reports)	**PDF**. The Report will be in a PDF format.
	Excel. The report will be in an Excel format.
	Word. The report will be in an Microsoft Word format.
Contains __ month(s) of information	Select a number from the drop-down list to select the number of months to include in the report. Not applicable for Quality Assurance Report.
Sorted by	Select the data to sort by from the drop-down list. Applicable for Client Test Order Summary only.
Save	Click to save the report.
Cancel	Click to cancel and return to the Schedule Report tab.

Find a Scheduled Report

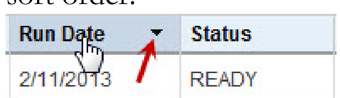
When you select the Schedule Report tab, existing reports you have created are displayed.

- Active status indicates the report has run or will run until the next run date.
- Pending status indicates the report has not run yet.
- Expired status indicates the report will no longer run (the scheduled ending date has been reached).



Edit Schedule Report Screen

At this tab you will also see any previously-scheduled reports.

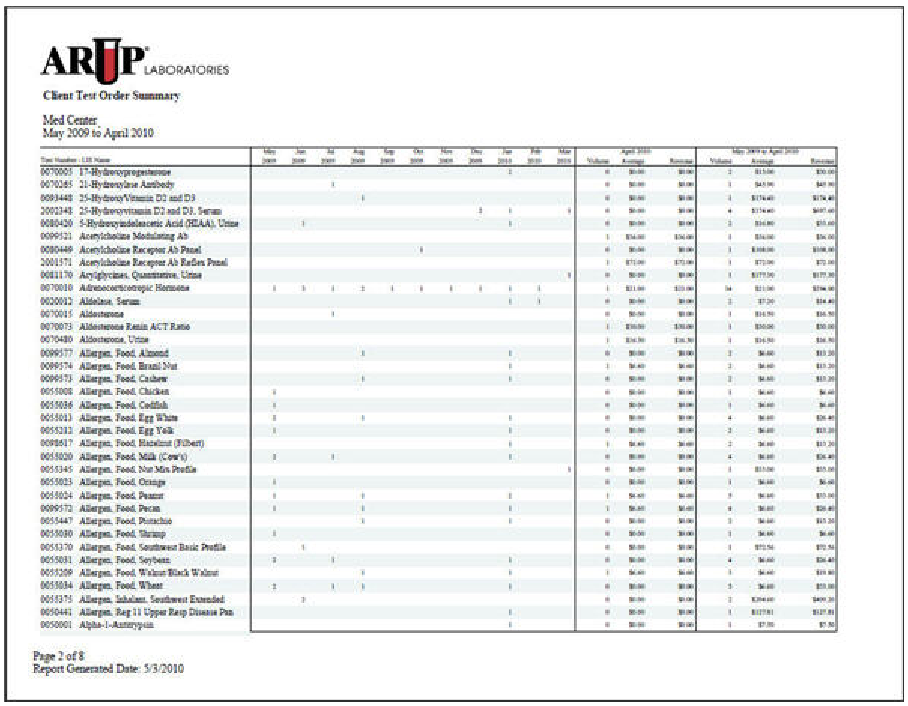
Action	Click to edit an existing report.
	Click to delete an existing report.
Sorting	To sort the list, click on a column heading. An arrow in the sorted column will indicate whether the list is sorted in ascending or descending order. Click on the column heading again to reverse the sort order. 
1 2 Next	For long lists, click on the page symbols at the bottom of the list to scroll through the list.

Available Reports

Client Test Order Summary

The Client Test Ordering Summary report provides test ordering information for a single client or a group of clients for a specified date range. The report shows monthly test volumes for each test and also aggregate volumes for the date range specified. You may sort the report by test name, test number, or volume.

Example report:



Custom Hot Line Index

The Custom Hot Line Index report contains a customized report that applies to a specific client.

The report contains the following information for Quarterly Hot Lines for the specified period (one or two years):

- All the changed tests that the client has ordered previously.
- New tests and tests that have been made inactive.
- A matrix that clearly details tests that had a change in name, methodology, scheduling, specimen requirements, reference interval, interpretive data, note, CPT code, component change, interface.

Go to the ARUP website to get more detailed information on the test changes.

Note: Information for Immediate Hot Line changes are not contained in this report.

ARUP LABORATORIES

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fax: (801) 583-2712 | web: www.aruplab.com
CLIA # 46D0523979

A nonprofit enterprise of the University of Utah and its Department of Pathology

Custom Hot Line Index Report

Client Name: UH

Utilization Report Year: 2011

Hot Line Date: Aug 19, 2013

Hot Line Page #	Test Num	Test Name	Name Change	Methodology	Performed\Reported\Schedule	Specimen Requirements	Reference Interval	Interpretive Data	Note	CPT Code	Component Change	Other Interface Change
25	2001768	Bordetella pertussis Antibody,					X		X			
25	2001774	Bordetella pertussis					X		X			
25	2001775	Bordetella pertussis					X		X			
25	2001784	Bordetella pertussis					X		X			
27	2002065	Chimerism, Recipient Pre-			X					X		
27	2002066	Chimerism, Post-Transplant			X							
27	2002293	Chromosome Analysis,								X		
29	2002296	Chromosome Analysis, Solid			X							
34	2002029	Congenital Adrenal				X	X					X
36	2002932	Coxsackie A Antibodies	X			X						
45	2002217	ERBB2 (HER2/neu) (4B5) by									X	
47	2001961	Familial Mutation, Targeted								X	X	

Custom_Hot_Line_Index

Exception Handling Report

ARUP Exception Reports lists orders and specimens held by ARUP during the previous month for issues including (but not limited to):

- Specimen identification
- Test cancellations for insufficient volume, inappropriate sample type, stability or temperature violations
- Approval for testing with the use of a disclaimer
- Clarification of specimen type, media, collection duration, etc.
- Alternative testing
- Missing required information

Example report:

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Client_Exception_Report
May 1, 2014–May 31, 2014

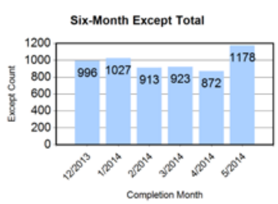
Excepts Total for

Summary of May 1, 2014–May 31, 2014

Total Exceptions: 1178
Tests Ordered: 154501
Exception Rate: 0.76 %

Increased from 0.56 % in Apr 2014

Six-Month Except Total



Reason for Exception	Apr 2014	May 2014	Average* for Comparable Clients
Broken	1	2	0.40
Clarify Client Information	2	4	0.00
Clarify Diagnosis	6	11	0.80
Clarify Draw Date/Time	5	17	4.30
Clarify Media	1	0	0.00
Clarify Patient Demographics	16	17	8.90
Clarify Source and/or Specimen Type	31	50	2.90
Clarify Test	110	108	13.30
Client Requested Cancellation	12	16	5.80
Consent Form Required	1	1	0.00
Contamination	4	2	0.60
Duplicate Order	51	112	2.90
Extra Specimen Submitted	5	14	2.40
Identification Discrepancy	7	7	11.80
Inappropriate Media	19	39	0.70
Inappropriate pH	3	2	4.40
Inappropriate Specimen Type	136	143	16.40
Inappropriate Temperature	21	30	1.60
Incomplete Information	12	23	6.70
Leaked in Transit	2	4	1.40
Miscellaneous	56	56	5.40
No Source	8	10	0.10
No Specimen	245	394	18.00
No Test Marked/Noted	5	4	0.10
Prioritize Testing	2	0	0.00
Quantity Not Sufficient	51	58	23.10

CONFIDENTIAL: This document may be protected from disclosure by state and federal law.

Report produced on: 8/4/2014 1:53:05 PM MST

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Public Health Reporting

The Public Health Reporting report provides an excel spreadsheet of all public health reporting information for a selected date range.

The report can be generated in **Basic** or **Detailed**, depending on the amount of information you want to display.

Example Basic Report:

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CLIA #

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Client Copy of Public Health Report - Basic
Report Date: November 03, 2015

Client ID:

Account Executive:

Purpose: This report includes patient results that have been reported to a public health entity in the given time frame.
Support Contact: ARUPPHRInfo@aruplab.com

Patient Name	Date of Birth	Sex	MRN	Accession	Test Name	Result Test Number	Collection Date	Verified Date	Result	Unit of Measure	Date Reported	Delivered To
EXAMPLE, TEST	9/1/2011	M	123456789	12345678910	Lead, Blood (Venous)	1234567	10/30/2015	10/31/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	09/24/2014	M	123456789	12345678911	Lead, Blood (Venous)	1234568	10/30/2015	10/31/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	10/02/2013	M	123456789	12345678912	Lead, Blood (Venous)	1234569	10/29/2015	10/30/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	06/02/2013	F	123456789	12345678913	Lead, Blood (Venous)	1234570	10/29/2015	10/30/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	07/22/2014	F	123456789	12345678914	Lead, Blood (Capillary)	1234571	10/29/2015	10/30/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	02/06/2014	F	123456789	12345678915	Lead, Blood (Capillary)	1234572	10/29/2015	10/30/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	06/17/1980	F	123456789	12345678916	Lead, Blood (Venous)	1234573	10/28/2015	10/30/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	10/08/2014	M	123456789	12345678917	Lead, Blood (Venous)	1234574	10/30/2015	10/31/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH
EXAMPLE, TEST	07/06/2014	M	123456789	12345678918	Lead, Blood (Venous)	1234575	10/30/2015	10/31/2015	<2.0	ug/dL	11/03/2015	DEPARTMENT OF HEALTH

Quality Assurance Report

Monthly quality assurance reports provide a resource for clients to monitor laboratory reference services.

ARUP Client QA Reports document occurrences reported during the previous month and include patient information, processes involved, and ARUP's responses to:

- Tests not performed due to ARUP error
- Testing/reporting delayed due to ARUP error
- Result reports corrected due to ARUP error
- Any client concerns

Note: The layout for the QA Reports is different for single month and multi-month reports.

Example report:

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ARUP Quality Report

Reporting Period: January 2013

SQA only General 02 NIF
500 Chipeta Way
Salt Lake City, UT 84108

Client ID: 2989 Business Development Manager: Testing ReferenceTableAgent

ARUP's quality plan provides for management and oversight of its quality systems representing all aspects of ARUP's operation, including testing processes, pre- and post-analytical processes, and general laboratory processes. To promote patient safety, ARUP combines Quality Assurance (QA) indicator monitoring with quality reporting and quality improvement in a cycle of continuous improvement strategies. The goal of ARUP's quality plan is to define and to meet the needs of ARUP's complex customer base and serve the ultimate client, the patient.

For comments and inquiries, please contact Compliance and Quality Systems at: ARUPcompliance@aruplab.com.

Dina Hannah, MBA/HCM, MT(ASCP)H, SBB, CIPP/US
Vice President
Director, Compliance and Quality Systems
Phone: (800) 242-2787, ext. 5126

Licensure and Accreditation

ARUP is accredited by the College of American Pathologists (CAP) and has CLIA (Clinical Laboratory Improvement Amendments) certification. ARUP also holds current licensure or permits required by state or local regulations. Current copies of these can be found at: http://www.aruplab.com/Testing-Information/Quality-Compliance/licensure_accreditations.jsp

Proficiency Testing Performance

ARUP annually compiles CAP proficiency testing evaluation data to determine our overall success rate. The success rate in 2011 for CAP # 4096301 was 98.3%.

Quality Indicator Trends

The indicator data on the next page shows either counts of process failures or the patients affected by the process failure. Only process failures where intervention by ARUP was unsuccessful are included in the report.

Definitions:

- **Process Failure Types:** This includes Pre-Analytic, Analytic, Post-Analytic and Other Process failures. Other Processes include support system process failures (i.e., computer, supply, financial, etc.)
- **Corrected Result:** Corrections to patient results, accompanying reference intervals and interpretations
- **Test Not Performed:** Missed orders or compromised specimens where the test could not be performed as ordered
- **Significant Case:** A quality-of-service issue may be considered significant if it carries a potential or resulted in an undesirable healthcare or business outcome. Examples include: lost, irretrievable specimens; non-communicated critical results; delayed testing adversely affecting patient safety due to an ARUP error.
    - **Potential Significance:** Causal analysis performed; recommendations reviewed and implemented. Process is monitored for sustained improvement through the section quality assurance plan. Issue was reviewed in the monthly section Quality Assurance meeting and in a weekly meeting with selected ARUP executive, management and quality staff; discussion includes shared best practices and potential, organization-wide preventive/corrective actions to address patient safety issues.
    - **Management Evaluation:** Incident presented in monthly section Quality Assurance meeting with management and in a weekly meeting with selected ARUP executive, management and quality staff; corrective/preventive action plan will be followed to completion. Corrective/preventative actions include changes to infrastructure, process design, personnel training and resource allocation in cooperation with other ARUP entities, as indicated.

Report run at 2/5/2013 2:00:44 AM Page 1 of 2

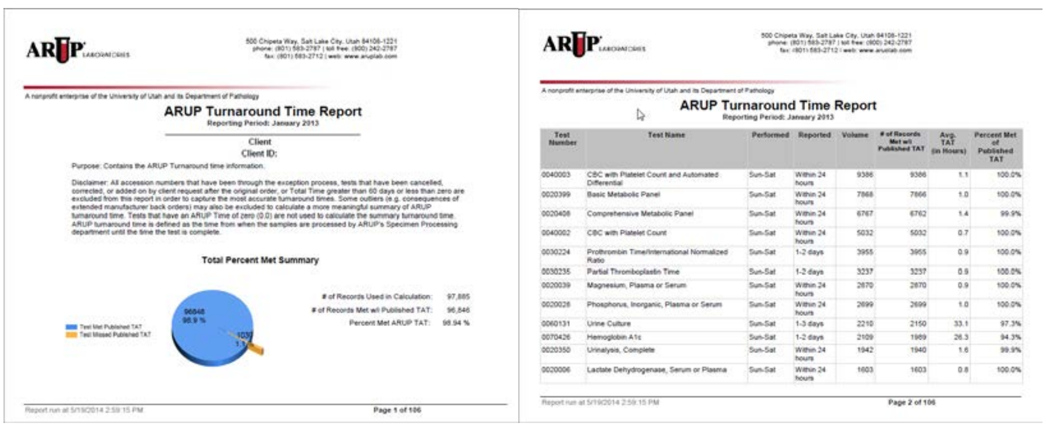
Turnaround Time Report

ARUP Turnaround Time Report provides a list of Turnaround times (TAT) for all tests ordered in a specific month.

The report is available the second day of the month and can be generated for any month in the current or past calendar year. The report contains the following information for the selected month:

- Total percent summary of all tests ordered that met the published ARUP Turnaround time
- The number, name and published ARUP Turnaround time for each test ordered
- Volume of the specific test ordered
- Average Turnaround time of specific test
- Number and percent of the specific test ordered that met the published ARUP Turnaround time

Example report:



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ARUP Turnaround Time Report
Reporting Period: January 2013

Client
Client ID:

Purpose: Contains the ARUP Turnaround time information.

Disclaimer: All accession numbers that have been through the exception process, tests that have been cancelled, corrected, or added on by client request after the original order, or Total Time greater than 60 days or less than zero are excluded from this report in order to capture the most accurate turnaround times. Some outliers (e.g. consequences of extended manufacturer back orders) may also be excluded to calculate a more meaningful summary of ARUP turnaround time. Tests that have an ARUP Time of zero (0.0) are not used to calculate the summary turnaround time. ARUP turnaround time is defined as the time from when the samples are processed by ARUP's Specimen Processing department until the time the test is complete.

Total Percent Met Summary

# of Records Used in Calculation: 97,885
# of Records Met w/ Published TAT: 96,846
Percent Met ARUP TAT: 98.94 %

Report run at 5/19/2014 2:59:15 PM — Page 1 of 106

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ARUP Turnaround Time Report
Reporting Period: January 2013

Test Number	Test Name	Performed	Reported	Volume	# of Records Met w/ Published TAT	Avg. TAT (in Hours)	Percent Met of Published TAT
0040003	CBC with Platelet Count and Automated Differential	Sun-Sat	Within 24 hours	9386	9386	1.1	100.0%
0020399	Basic Metabolic Panel	Sun-Sat	Within 24 hours	7868	7866	1.0	100.0%
0020408	Comprehensive Metabolic Panel	Sun-Sat	Within 24 hours	6767	6762	1.4	99.9%
0040002	CBC with Platelet Count	Sun-Sat	Within 24 hours	5032	5032	0.7	100.0%
0030224	Prothrombin Time/International Normalized Ratio	Sun-Sat	1-2 days	3955	3955	0.9	100.0%
0030235	Partial Thromboplastin Time	Sun-Sat	1-2 days	3237	3237	0.9	100.0%
0020039	Magnesium, Plasma or Serum	Sun-Sat	Within 24 hours	2870	2870	0.9	100.0%
0020028	Phosphorus, Inorganic, Plasma or Serum	Sun-Sat	Within 24 hours	2699	2699	1.0	100.0%
0060131	Urine Culture	Sun-Sat	1-3 days	2210	2150	33.1	97.3%
0070426	Hemoglobin A1c	Sun-Sat	1-2 days	2109	1989	26.3	94.3%
0020350	Urinalysis, Complete	Sun-Sat	Within 24 hours	1942	1940	1.6	99.9%
0020006	Lactate Dehydrogenase, Serum or Plasma	Sun-Sat	Within 24 hours	1603	1603	0.8	100.0%

Report run at 5/19/2014 2:59:15 PM — Page 2 of 106

Critical Call Log Report

The ARUP Critical Call Log Report provides clients with information on all Critical Calls (up to three years of data is available).

- ARUP Accession and Collection Date, Patient Name, and the Ordered Test
- Result and Critical Notification information

Example report:

ARUP LABORATORIES

500 Chipeta Way, Salt Lake City, Utah 84108-1221
phone: (801) 583-2787 toll free: (800) 242-2787
fax: (801) 583-2712 web: www.aruplab.com

ARUP is an enterprise of the University of Utah and its Department of Pathology.

Critical_Call_Log_Report
for Client Name
1/1/2014 through 2/28/2014

ARUP Accession	Patient Name	Ordered Test
Example	Example	**Partial Thromboplastin Time**

Collection Date: 1/3/2014 5:40:00 PM

Result: 92 sec Partial Thromboplastin Time

Reference Range: 24-35 sec

Critical Notification: Example

Manage Groups

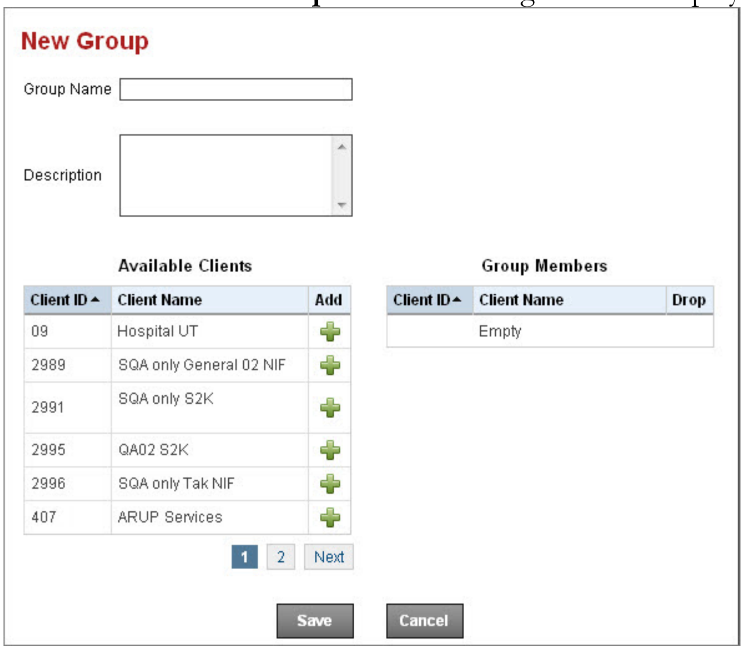
The Manage Groups option allows you to create a group that contains multiple clients. You can then use the group(s) to get a single report with multiple clients included.

Modify Manage Groups Screen

Show 10 Entries	Use the drop-down list to select the number of groups to display.
Action	Click to edit an existing group.
	Click to delete an existing group. If you delete a group in error, this cannot be undone. However, the group can be set up again as a new group.
Group Name	Displays the name of the group.
Created When	Displays when the report was last created/edited.
Sorting	To sort the list, click on a column heading. An arrow in the sorted column will indicate whether the list is sorted in ascending or descending order. Click on the column heading again to reverse the sort order. Group Name
1 2 Next	For long lists, click on the page symbols at the bottom of the list to scroll through the list.

Setup a New Group

1. Click on the **Manage Groups** tab.
2. Click **Create New Group**. The following screen is displayed.



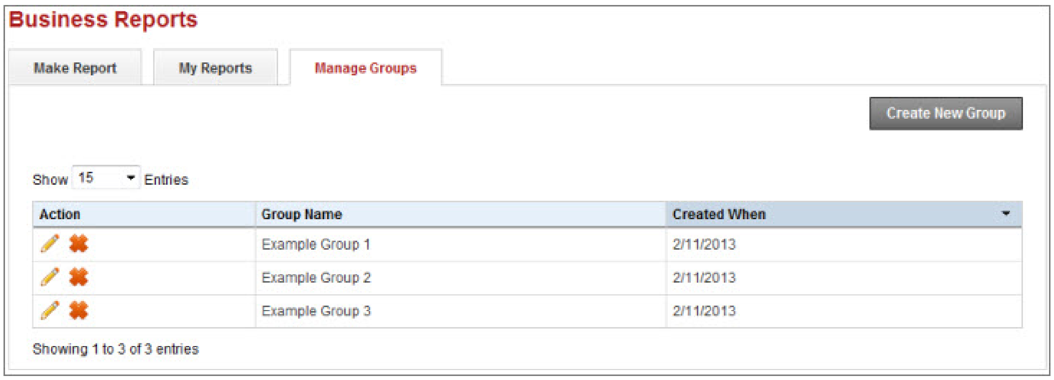
3. Enter a **Group Name**.
4. Enter a **Description** (optional).
5. In **Available Clients**, click next to the name of the client you want to add to the group. The group is added to the **Group Members** list.
6. Repeat step 5 until all of the desired clients are in the **Group Members** list.

New Group Parameters

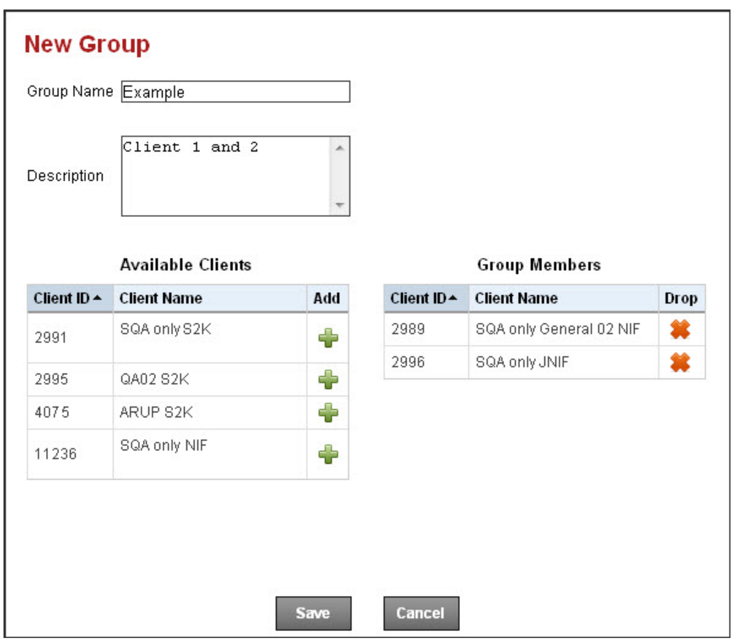
Group Name	Enter the name of the group. Use only alpha and numeric characters in the name; do not use symbols. Note that the group name can be changed at a later time using .
Description	Enter a brief description to further identify this group. Not required.
	Click the icon next to the client ID in the **Available Clients** list to add it to the **Group Members** list.
	Click the icon next to the client ID to remove it from the **Group Members list**. The client is removed from **Group Members** and added to the **Available Clients** list.
1 2 Next	For long lists, click on the page symbols at the bottom of the list to scroll through the list.
Save	Click to save your changes.
Cancel	Click if you do not want to make changes.
Sorting	To sort the list, click on a column heading. An arrow in the sorted column will indicate whether the list is sorted in ascending or descending order.  Click on the column heading again to reverse the sort order.

Find a Group

When you select the Manage Groups tab, existing groups you have created are displayed.



Example Group:



Email Notifications

To receive email notifications for Business Reports you will need to set this up under **Email Preferences**.

1. Go to **Account Administration** > **Email Preferences**.
2. Scroll down to **Business Reports**.
3. Activate the ☑ checkbox next to the notification you want to receive.
4. Use the drop-down menu to modify the frequency, if desired.

5. Click **Save**.

Visual Notifications

Visual cues display in the Header and Menu items to alert you that new information is available.