

Summary

This release brings new additions to the User Performance Dashboard.

I. Task Summary and Task Level Details Report

New reporting from the Tasks module in LeadingReach. Reporting and metrics include:

Task Summary

- **Metrics**

- *Task Count*
Total number of tasks
- *Completion Rate*
Number of tasks completed/total number of tasks
- *Open Rate*
Number of open tasks/total number of tasks
- *Overdue Rate*
Number of open tasks past their due date/total number of tasks
- *Average Days: Created to Completed*
Average number of days from the task creation date to the completion date
- *Average Days: Due to Completed*
Average number of days from the task due date to completion date
 - **Note:** A positive number indicates the tasks were completed past their due date while a negative number indicates an early completion

- *Average Days Overdue*
For open tasks that are past their due date, the average number of days that they are overdue
- Task Count by Status
Trended by month and by status
- Task Completion Rate
Trended by month
- Overdue Task Count
Trended by month
- Overdue Rate
Trended by month

Additional Notes

- The reporting is shown at the Organization Level and User Level
- Filters & Parameters are provided to view the reporting at the User Level either by the Assigned to User or the Completed by User
- For Trended Reports, a Parameter can be used to changed the date perspective from Created, Due, or Completed Date

Task Level Details

Row level table is available that displays the following fields:

- task_organization
- created date
- due_date
- completed_date
- referral_id
- task_name
- task_status

- created_user_name
- assigned_user_name
- completed_user_name
- sent_on (associated referral sent_on date)
- referral_from_organization_name
- expired (y/n)

Appointment Requests Summary

New Reporting from the Appointment Requests module in LeadingReach

- *Appointment Request Count*
Trended by month and by status
- *Appointment Conversion Rate*
Trended by month
 - **Note:** The number of Appointment Requests attached to an existing referral or converted to a new referral/Total number of Appointment Requests
- *Open Appointment Requests Table*
 - **Note:** The number of open appointment requests by month with heat mapping color scale applied, indicating the age in days of the appointment request

New Reporting Added to Incoming Referral Performance Dashboard

- *Added Referrals by User*
Number of Added Referrals, trended by month and by user
- *Referrals Moved out of New (RTR by user)*
Number of referrals moved out of a New status, trended by month and by user

II. Updates to LeadingReach Analytics Standard Referral Dashboards

- *Normalize Referral Trends*
View Referral Volume by Daily Average option added to LeadingReach Analytics
- A new parameter added to LeadingReach Analytics standard referral dashboards to view referral volumes either by the total or the daily average
- Granular Filter Options Added
- An option to show additional filters added to LeadingReach standard referral dashboards. Additional filters added:
 - To Location
 - To Provider
 - From Location
 - From Provider
 - Collaborator
 - Referral Type
 - Referral Status
- Updates to LeadingReach Analytics - Narrow Network with Plans
- Outgoing Referrals - Opt Out Summary was updated to:
Outgoing Referrals - Plan Performance Summary
- Additional views added to view referral performance metrics by plan selected. Existing Opt Out reporting retained and moved further down the page. Opt Out Summary renamed to: *Plan Performance Summary*