

# Performance Trending Job Aid

## Introduction

**Performance Trending** tracks tasks that have been completed in HealthSource. The tracking data is displayed in the **Performance Donuts** and from the **Performance Trending Window**.

The **Performance Donuts** display tasks completed for the user, for the current day. (Current day starting and ending at midnight).

The **Performance Trending Window** displays tasks completed in a trending format for the last 8 calendar days by user and by team.

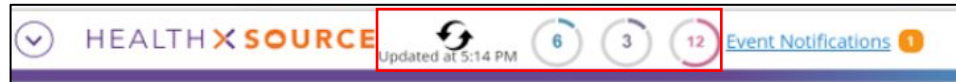
## Tasks Tracked

The below table shows tasks tracked during each milestone:

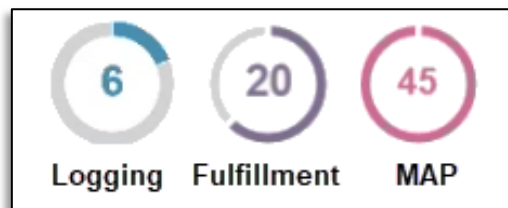
Milestone	Tasks Tracked
Logging	<ul style="list-style-type: none"><li>• Logging Submit</li><li>• Logging Correspondence Submit</li><li>• Stat batch Submit</li></ul>
Fulfillment	<ul style="list-style-type: none"><li>• Fulfillment Submit</li><li>• Express ROI Submit</li><li>• Fulfillment Correspondence Submit</li><li>• Stat batch Submit</li></ul>

## Performance Donuts

The **Performance “Donuts”** are located at the top of the web page, to the right of the HealthSource logo.




The donuts are a visual representation of Logging and Fulfillment tasks completed for the current day as well as a MAP calculation.



When Logging or Fulfillment task are completed, a count of 1 is added to the corresponding donut. MAP will be updated based on the Major Class / Requester class of the request submitted. The donut rings will fill in to indicate a completion percentage of your daily goal.



Donuts automatically update when a task is completed, but can be manually updated by clicking the refresh icon .

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## Performance Trending Job Aid, Continued

### MAP (Mixed Adjusted Performance)

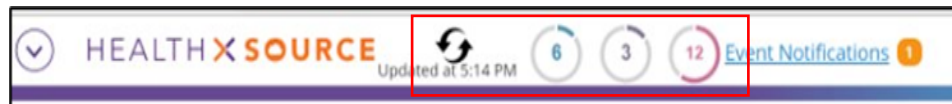
MAP is a weighted fulfillment productivity calculation. When a task is submitted from Fulfillment, MAP will update in accordance with the weight of the **Major Class/Requester Class** of the request submitted.

Major Class/Requester Class	Weight
ATTY/Attorney	4
CLIN/Continuing Care	1.5
COPY/Attorney	2
COPY/Insurance	2
DVNT/Datavant	1.5
FAC/Facility	1.5
GOV/Government	1.5
INS/Insurance	1.5
PAT/Patient	2
PAYD/PAYD	1
PAYI/PAYI	1
PRO/PRO	2

**Example:** I have a current MAP of 10. I fulfill a request with a Major Class: PRO. My MAP will then be 12 because requests with Major Class: PRO have a weight of 2.

### Performance Trending Window

The **Performance Trending Window** is accessed by clicking on any of the Performance Donuts.

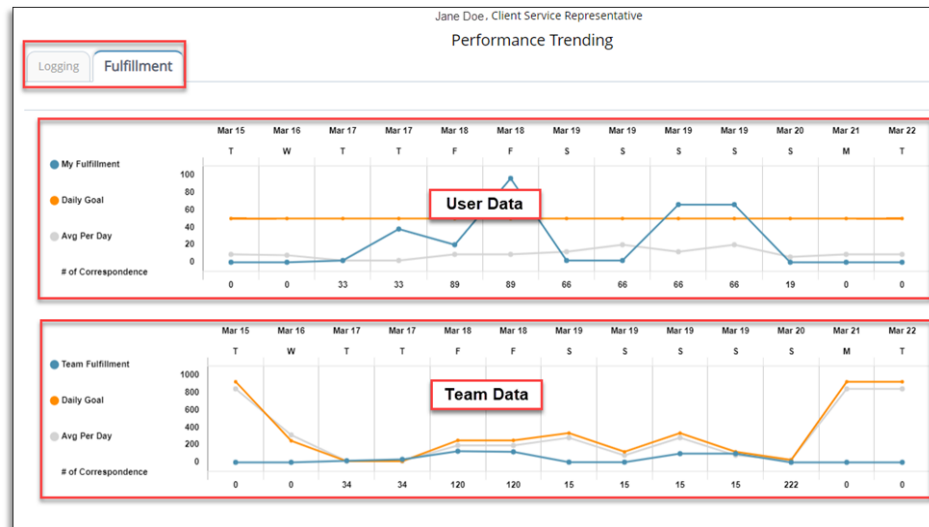


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## Performance Trending Job Aid, Continued

### Performance Trending Window, continued

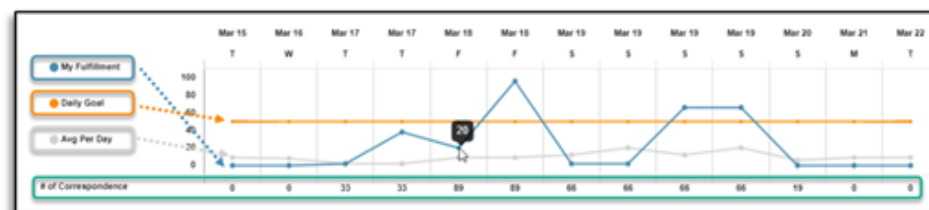
Logging or Fulfillment data is displayed by clicking the corresponding tabs located top left. The top graph displays User Data. The bottom graph displays Team Data.



**User Data:** consists of only the tasks performed by the user viewing the Performance Trending Window.

**Team Data:** consists of all Users who have access to the same sites as the User viewing the Performance Trending Window.

Three trend lines are shown on each graph. The number of correspondence letters sent on a given day is shown on the bottom.



Trend Line	Data
My Fulfillment / Team Fulfillment My Logging / Team Logging	Shows number of Logging or Fulfillment tasks submitted
Daily Goal	90-day average of tasks completed plus 10%
Avg Per Day	Average of tasks completed over the last 8 calendar days



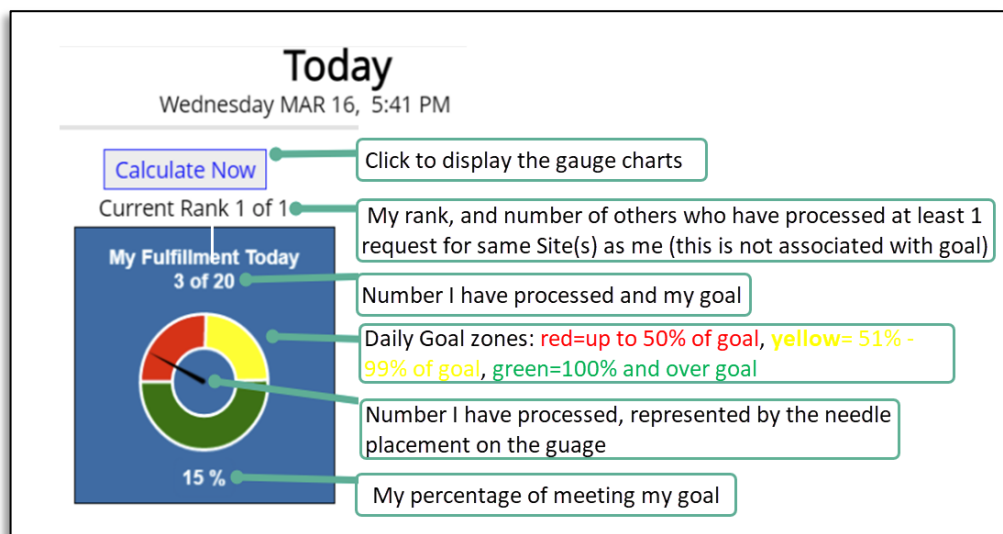
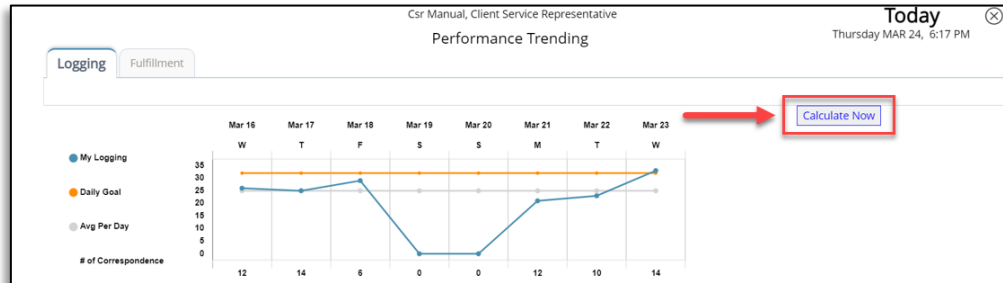
Hovering the mouse over a trend line displays the numerical value.

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## Performance Trending Job Aid, Continued

### Performance Gauge

The **Performance Gauge** is accessed by clicking **Calculate Now** from the **Performance Trending Window**.



The optimal screen resolution to view all donuts, charts and gauges is 1920x1080.



The optimal screen resolution to view all donuts, charts and gauges is 1980x1020. If any graphics do not display correctly, try adjusting the screen resolution, or the size of the window by dragging the borders.