

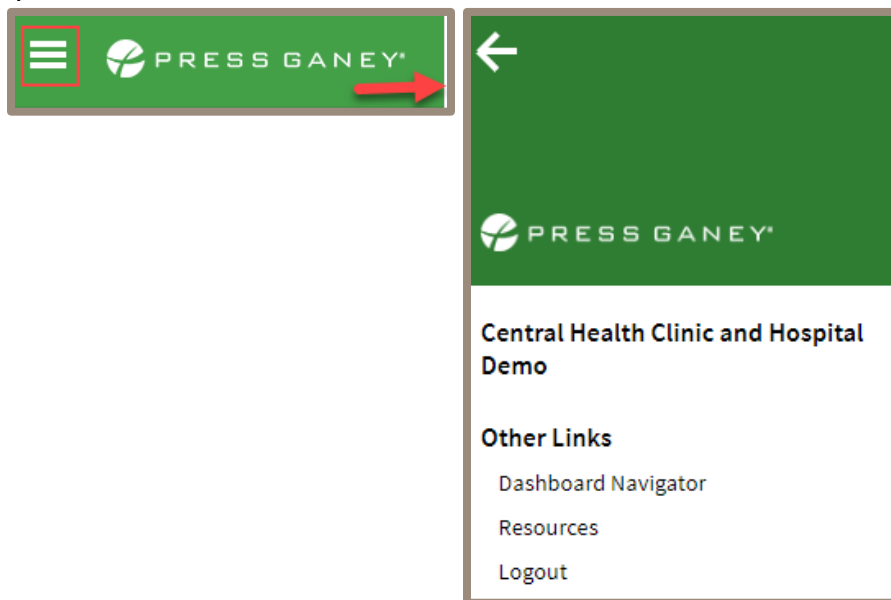
# Physician Engagement

## Navigation and Exports

This resource describes how to use common navigation and export features available throughout the tool.

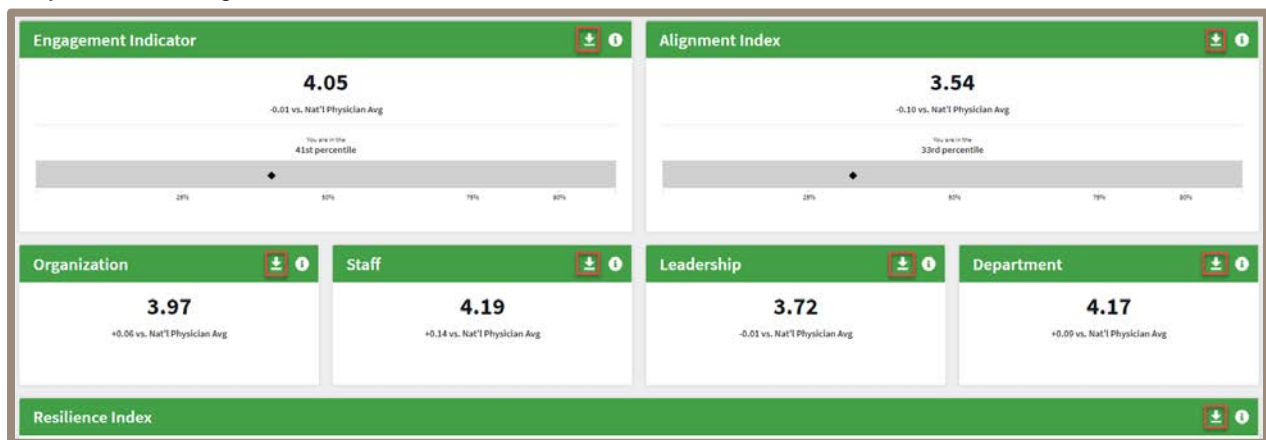
### Navigation Menu

In the upper left corner, click on the navigation menu icon to select Dashboard Navigator to switch between hierarchies, access helpful resources, or logout.



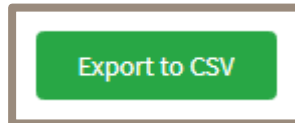
### Exports

From the Summary page, exports can be made by using the Export icons. This will export the summary tile you are viewing into a JPEG format.



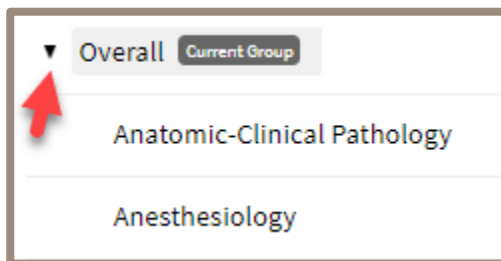
You can export all pages with item or work unit grids to a CSV (or Excel) file. These pages include:

- Strengths and Concerns
- Item Details
- Org Details
- Comments
- Response Rates



## Hierarchy Navigation

To navigate the hierarchy, use the dropdown arrow to expand or collapse report groups.

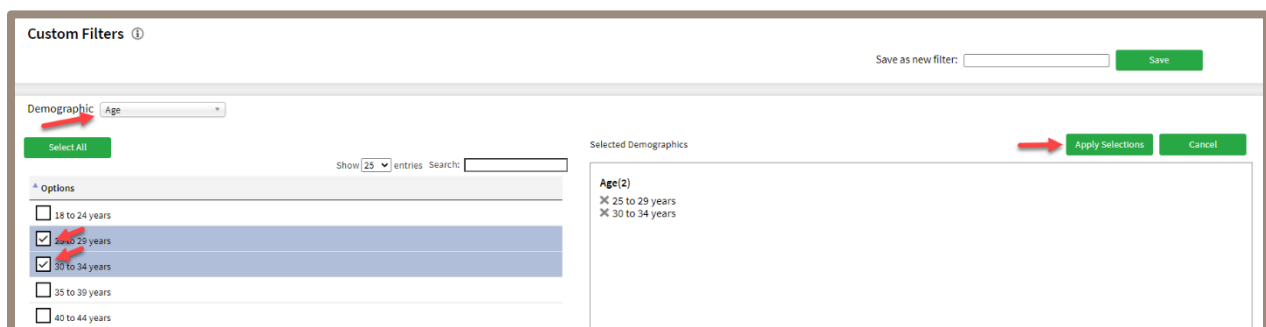


## Filters

To filter the data on any page, click the **Filters** button from the upper right corner of the screen. This will open a new page where you can select and apply filters.



Use the Demographic dropdown menu to select a demographic. Select the possible response options from the list, then apply your selections/



Search response options by using the Search bar to type keywords.



Place a check in the box next to each response option you would like to use as filters. You can also click the **Select All** checkbox to select all options.



A vertical list of five age range options, each with an unchecked checkbox to its left. To the right of the list is a green button with the text "Select All".

- 18 to 24 years
- 25 to 29 years
- 30 to 34 years
- 35 to 39 years
- 40 to 44 years

Once you have selected the desired filters, click **Apply Selections**. This will take you directly back to the page you were on when you clicked the **Filters** button.



A green button with the text "Apply Selections".

Filters will remain on until you turn them off. To turn off Filters, click **Clear Filters** next to Filter Results.



A green button with the text "Filters".

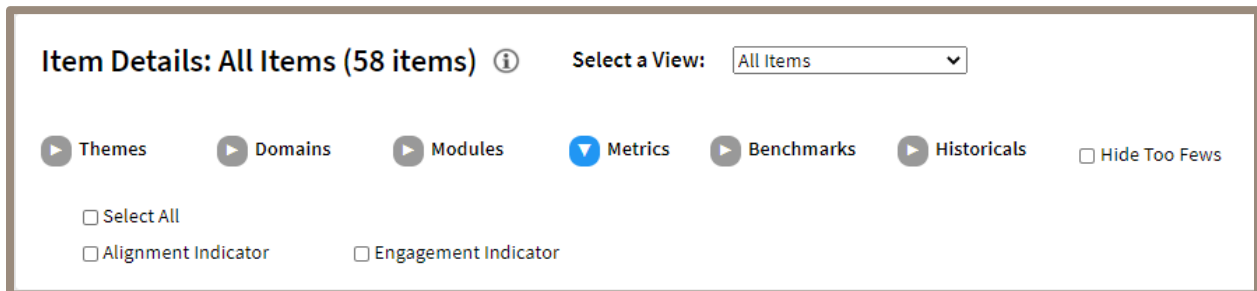


A green button with the text "Clear Filters".

## Options

Options to limit the information on a specific page view appear on the Item Details and Org Details pages.

To select an option, click the right-facing arrow next to each one.



A screenshot of the "Item Details" interface. At the top, it says "Item Details: All Items (58 items)" with an information icon. To the right is a "Select a View:" dropdown menu set to "All Items". Below this are several options, each with a right-facing arrow icon: "Themes", "Domains", "Modules", "Metrics" (which has a blue downward arrow), "Benchmarks", "Historicals", and "Hide Too Few's" (with an unchecked checkbox). At the bottom, there are two more options with unchecked checkboxes: "Select All" and "Engagement Indicator".

Place a check in a box next to the selections you'd like to make.

Click **Apply Selections** on the right side of the screen to apply your selections. To clear all your selections and start over, click **Clear All**.

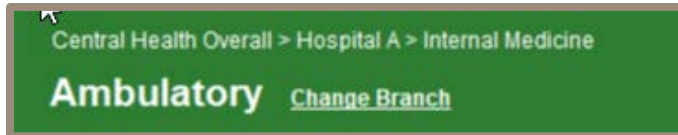


Two green buttons side-by-side: "Clear All" on the left and "Apply Selections" on the right.

## Sibling Module Navigation

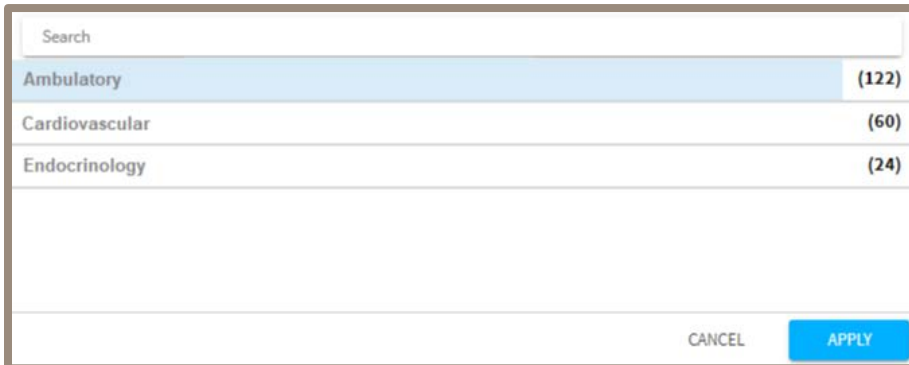
When two or more units appear at the same level within the hierarchy, those units are considered sibling units. A hierarchy leader who oversees sibling units will have access to the Sibling Navigation Module. If

you have that access, upon selecting the hierarchy from the Dashboard Navigator, you are taken to the unit with the highest n size.



Use the **Change Branch** link next to the breadcrumbs to open the Sibling Navigation Module. The module lists the highest-level units you have access to and the n size.

By selecting the current unit, the default hierarchy navigator will appear. You can search the sibling nodes to which you have access and select units knowing the n size.



Search	
Ambulatory	(122)
Cardiovascular	(60)
Endocrinology	(24)

CANCEL APPLY