AYIN Quality Insights Metrics Platform
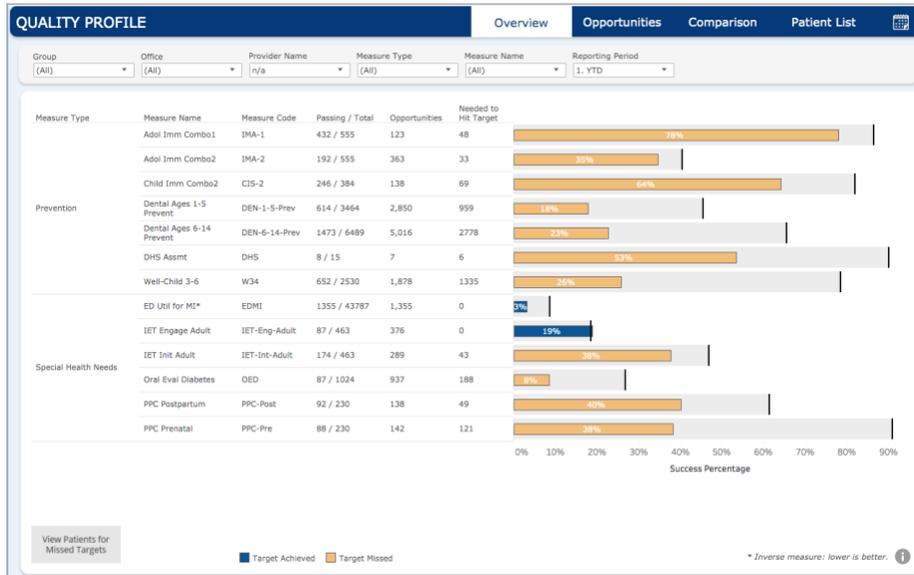
Tutorial of Top Functions for Clinics

1. **Accessing Insights From CIM**

2. **Review Current Metrics Performance for your clinic(s)**

3. **Exporting Gap Lists for Incentive Metrics**

Yamhill Community Care, July 2020

Accessing Insights From CIM

1. Once logged in to CIM, hover the curser over the grey-colored tool bar on the left side of the screen until the full tool bar appears.
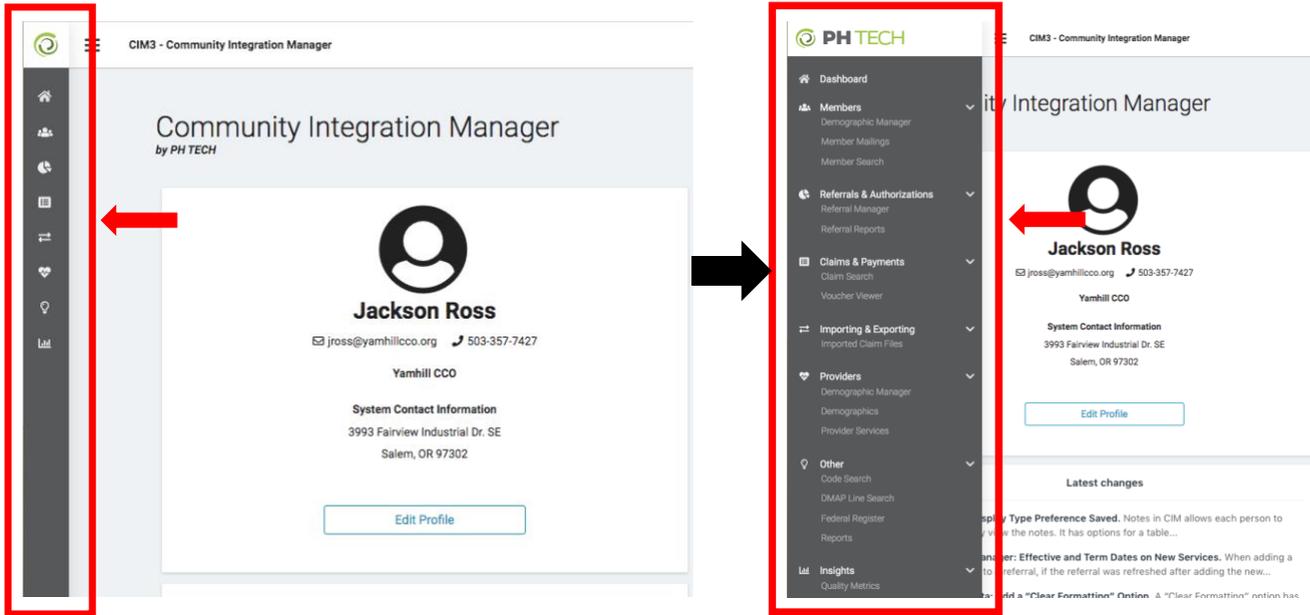
2. Select "Quality Metrics" from the "Insights" menu item at the bottom of the list.
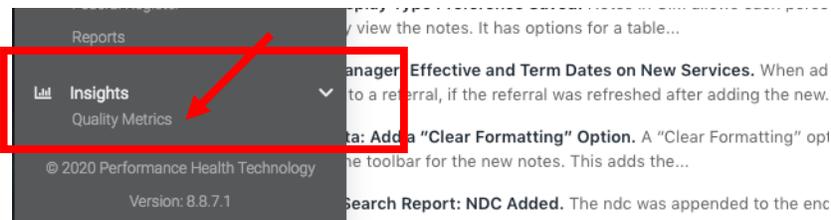
3. Select "YCCO Metrics" at the top of the page.
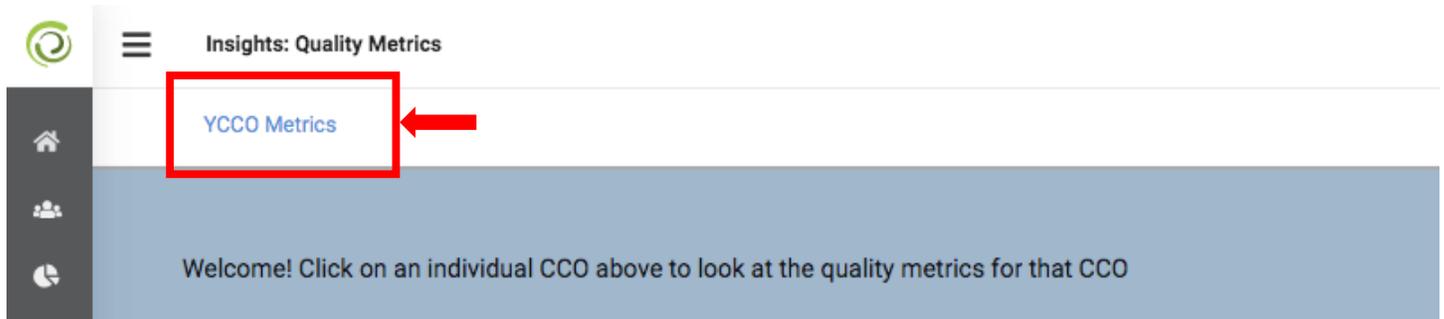
4. Insights will appear, with the "Overview" tab as the default starting page.
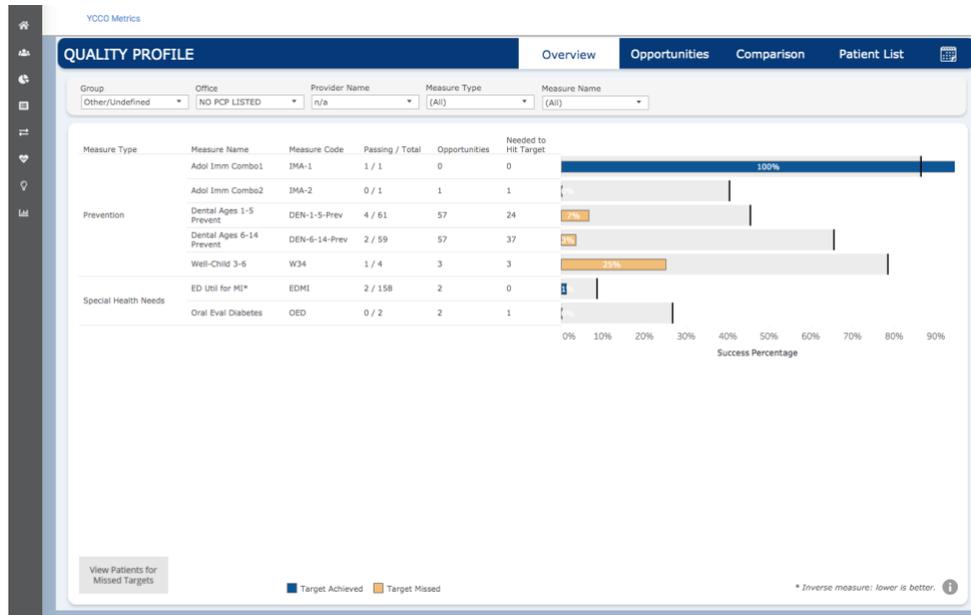
Review Current Metrics Performance for your clinic(s)

1. Navigate to the Overview tab from the available tabs at the top of the page (*Note: "Overview" tab opens by default when first accessing Insights*). A list of metrics that apply to your clinic will appear in the field below, including a graph showing current metrics performance.* Metrics that are current meeting target are colored blue on the graph, and metrics that have not yet been met are colored in gold.
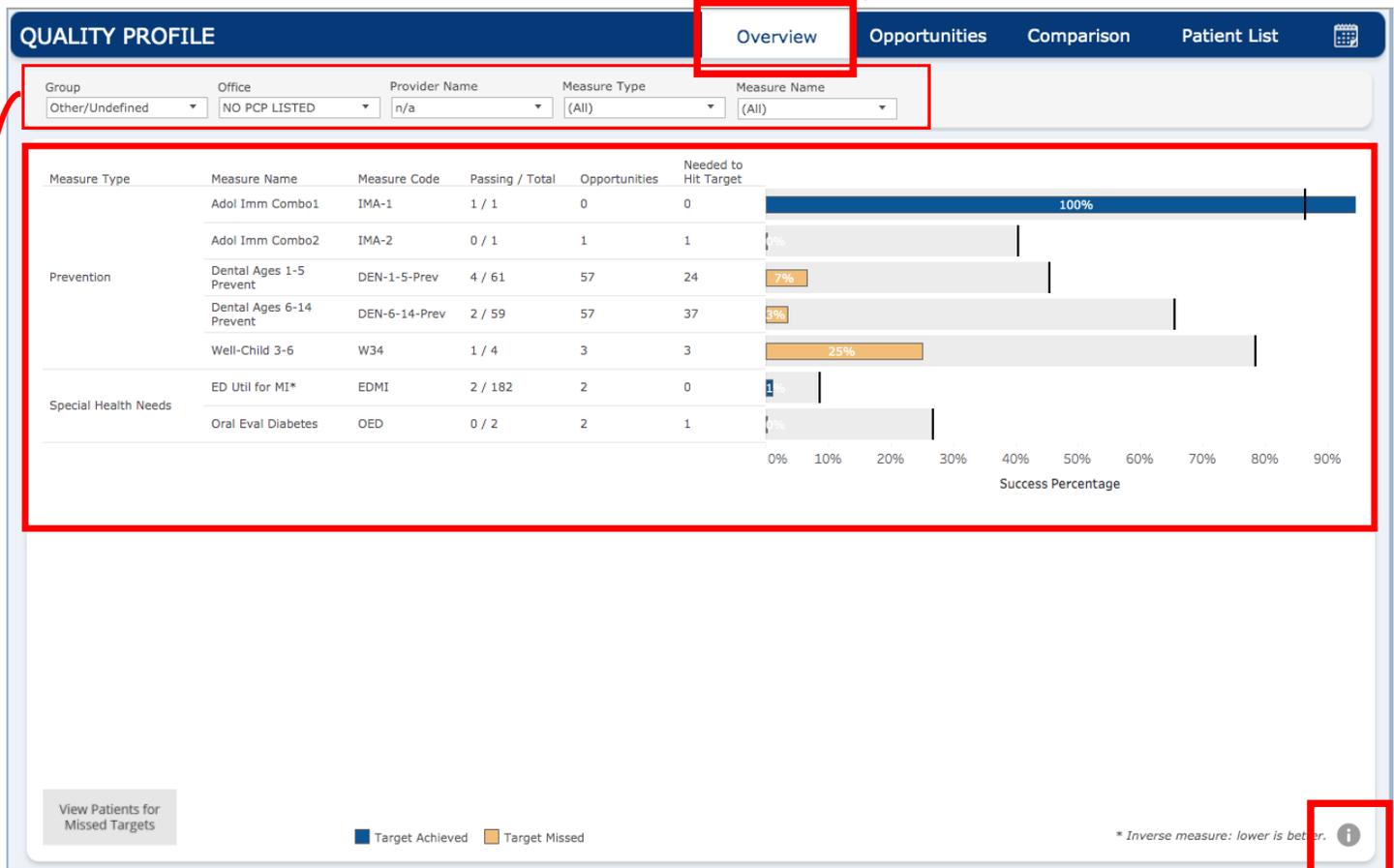
**the list of metrics you see may differ from the one you see in this tutorial*

2. Select the "Information" icon in the lower right-hand corner and a window will appear with details about what kind of information is included on this page.

3. Use the filters at the top of the page to filter based on any of the available criteria (*Note: if you only oversee one clinic many of these filters will have only one option and can therefore be disregarded*)

Exporting Gap Lists for Incentive Metrics

1. Navigate to the Overview tab from the available tabs at the top of the page. A list of metrics that apply to your clinic will appear in the field below, including a graph showing current metrics performance (*Note: The list you see may differ from the one you see in this tutorial*). Metrics that are current meeting target are colored blue on the graph, and metrics that have not yet been met are colored in gold.
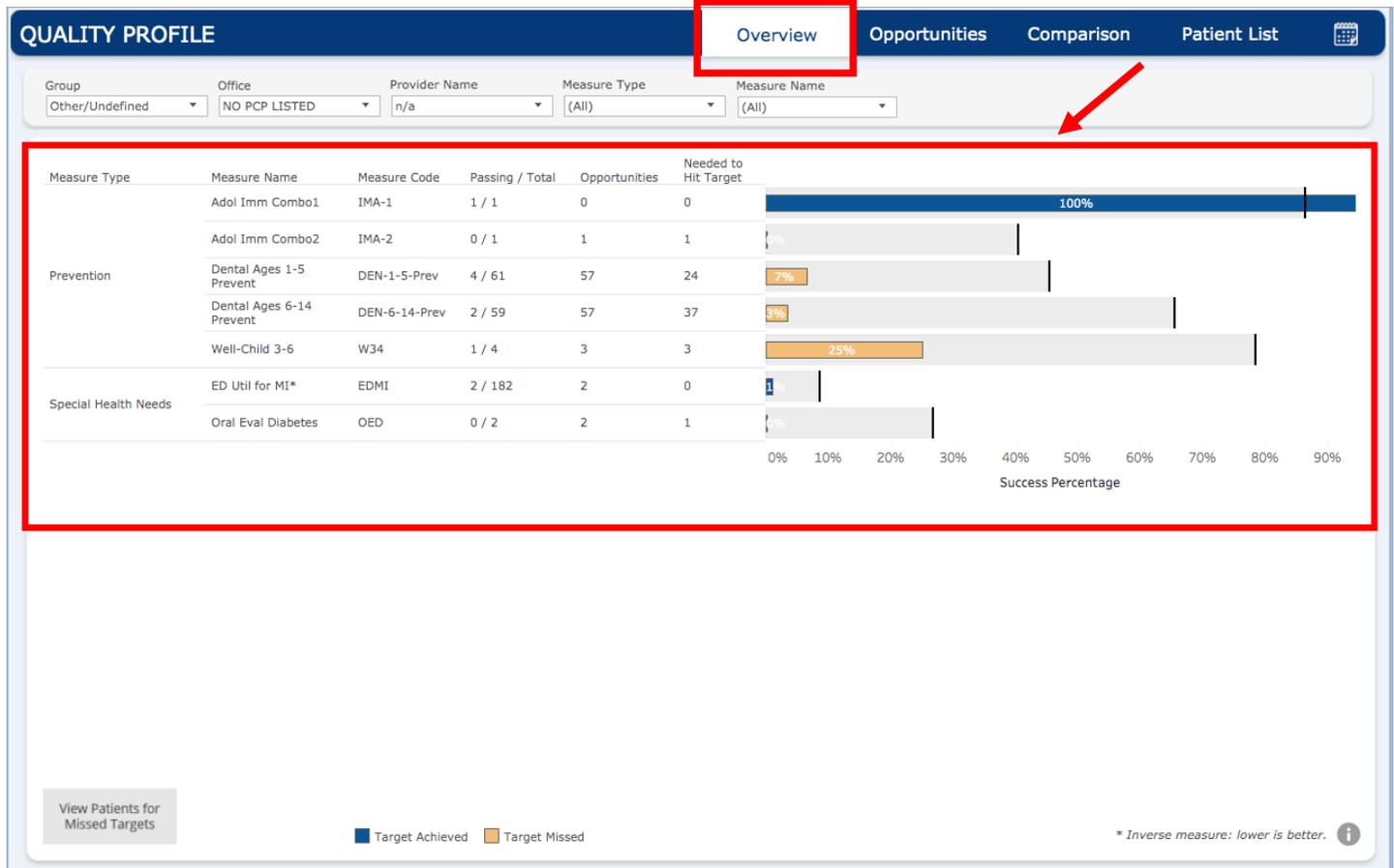
2. Hover your curser over any of the bars to show basic statistics for that metric. Click on the bar to display the "Click to view opportunity details" link in blue text. Click on that link.
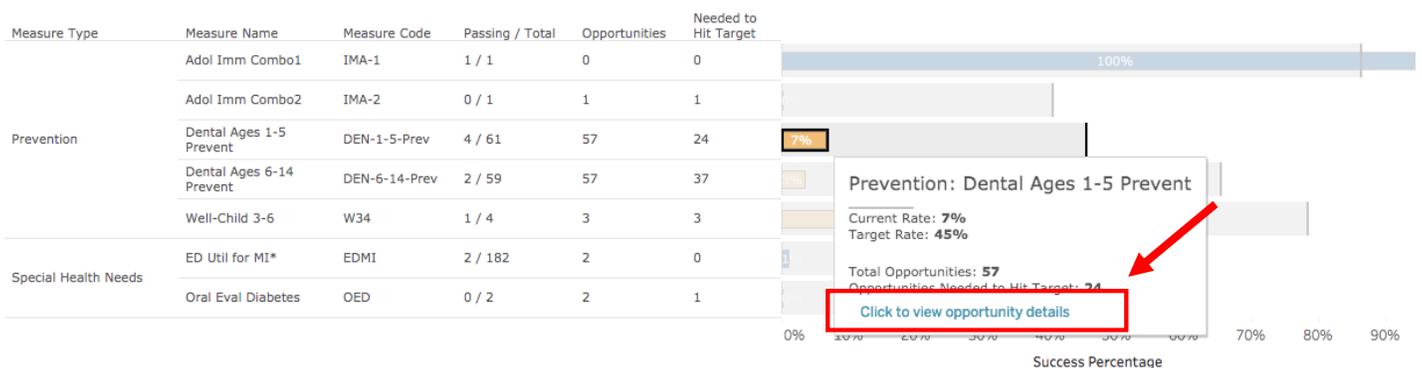
3. This will bring up a list of individuals who are eligible to meet the metric but have not met it yet. Insights refers to these as "Opportunities".
   a. If you would like to review a list of individuals who have met the metric, along with the date of service that resulted in them meeting the metric, select the "Status" Menu and then select "Pass".
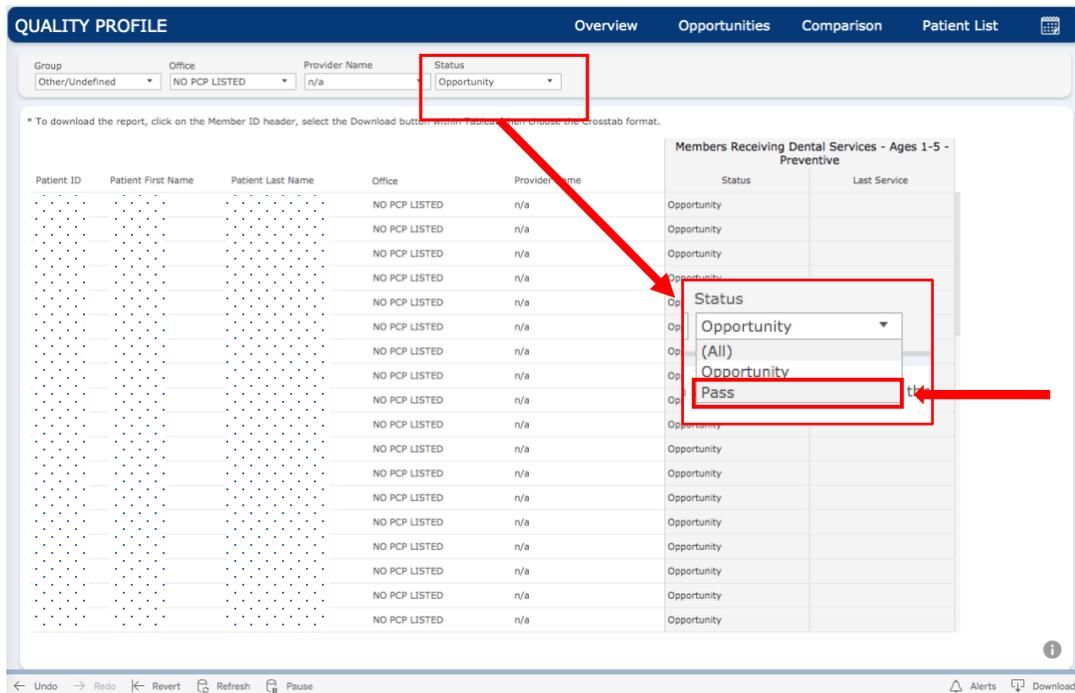
4. To download this list in a format that is compatible with Excel or other spreadsheet programs, select the "Download" button in the far lower right-hand corner of the window. This will bring up a window with different options to download the data. Select "crosstab", and another window will appear indicating that the file has been generated. Select "download" to download the file in .csv format.