



## Nurses' Reports & Dashboards Checklist

These reports and dashboards are the most commonly used and will help deliver smooth operations and compliance with efficiency.

All reports can be exported into multiple formats: pdf, word, excel or other for easy sharing with team

Report/Dashboard	Notes
HIS DASHBOARD	Run daily / bi-weekly: <ul style="list-style-type: none"> <li>- See HIS status for all patients</li> <li>- Start HIS docs from dashboard</li> <li>- Export HIS single form or in bulk to zip file</li> </ul>
IDG DASHBOARD	Every 15 days min. or weekly rolling if you have multiple IDG teams an IDG meeting every week: <ul style="list-style-type: none"> <li>- Full agenda sheet of patients with critical patient information</li> <li>- Easy chart access</li> <li>- Start new IDG update &amp; review previous right from dashboard</li> <li>- Patient's sorted by status and case manager for streamlined meetings</li> </ul>
ADMISSION AUDIT REPORT	Run bi-weekly: This report shows the status of several documents required on admission. Indicators are shown if any documents are late or incomplete. Filter by patient or admission date range.
UNFINISHED FORMS REPORT	Run weekly: See a listing of all forms that are unfinished or awaiting verification. View entire office, by patient chart, or by a specific employee.
CARE PLAN UPDATES	Run weekly: See a listing of all open care plans or the last care plan updates. View entire office, by patient chart, or by a specific employee.
FACE-TO-FACE/RECERT REPORT	Run weekly: Filter by patient status and payer type to track all upcoming F2Fs and recertifications.
NTUC REPORT	Run monthly: This report shows all patients marked Not Taken for Care (NTUC) for each month as well as all related NTUC approval and referral information.
END-OF-LIFE VISIT COUNT	Run weekly: This report shows all end-of-life visits filtered by date See details for all patients that passed in a timeframe or filter to view a single patient.
TRIAGE REPORT	Run daily in AM for overnight/weekend/holiday triage tracking: See all triage details such as who called, interventions, and more.



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