NHS Dental Services

E Reporting Good Practice Guide

Building Reports:
Creating a report using two universes

Using two universes

In E-reporting it is possible to extract data from two universes and amalgamate this data

For example, a contract's contracted UDA compared to the UDA actually carried out

To do this, data needs to be extracted from the Contracts Universe (Contracted UDA) and the Activity Universe (UDA performed)

Using two universes

Save a copy of the Activity Skeleton Report as "% UDA Delivered" then open it so it can be modified

Instead of Number of FP17s, the measure General Claim UDA needs to be included in the query

Using two universes

Query Filters

And
- Range of Schedule Year Month (YYYYMM)
- Reporting Year (YYYY)
- GDS and PDS Contracts Only (Filter)

Add a query filter for the reporting year (the year the treatment is allocated to), please note that this is formatted YYYY, depending on the final year, so for the year 2010-11 enter 2011

This filter is found in the Reporting Time Period folder of the universe
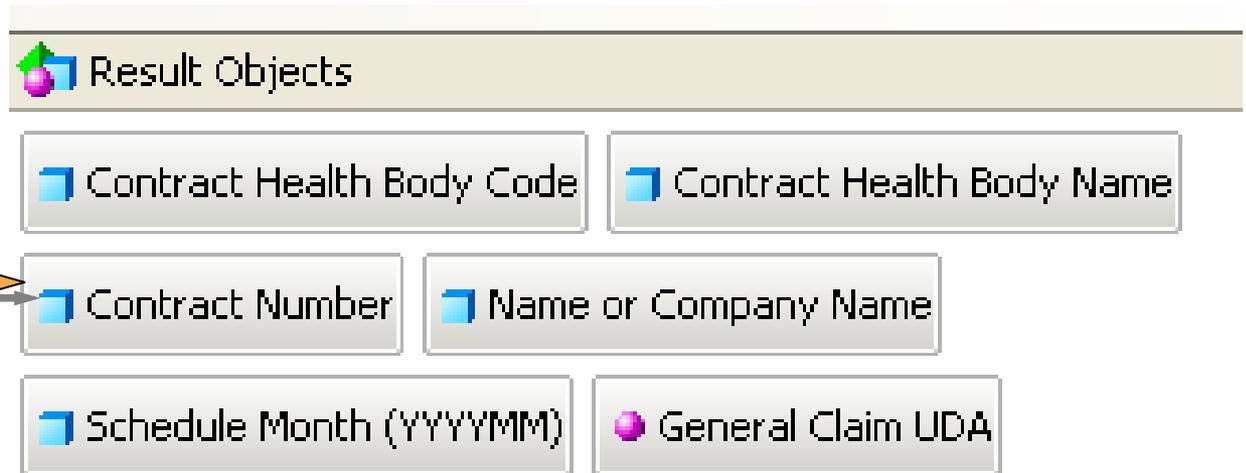
Add a query to show GDS and PDS contracts only

This filter is found in the Contract Information folder of the universe

Using two universes

Rename the query as Activity
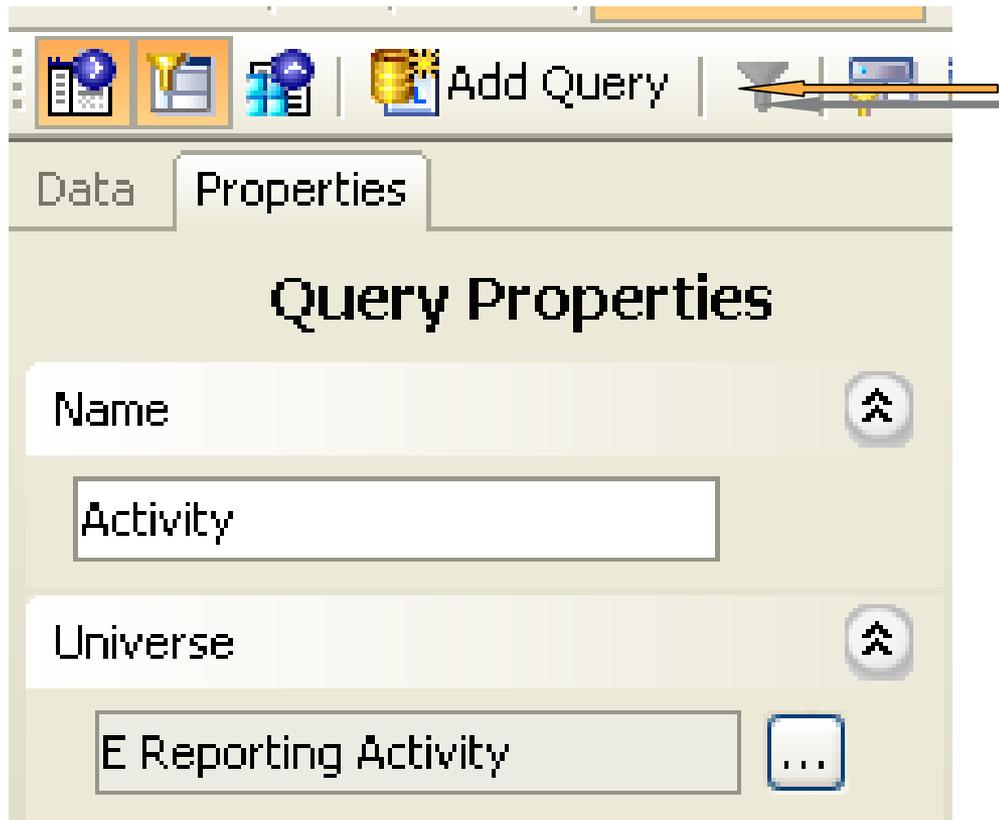
We now need to extract the contracted UDA. Click on Add Query

Using two universes

Universe

Select a universe for the query.

Universes used in this document:

Name	Domain	
E Reporting Activity		

Other available universes:

Name	Domain	
E Reporting Activity		
E Reporting Contracts		
E Reporting Finance		

Select the Contracts Universe and click ok

Using two universes

Data | Properties

- E Reporting Contracts
  - Contract Information
  - Reporting time period
    - Contracts Year Month
    - Contracts Year
    - Range of Contract Year Month
    - Specific Contract Year Month
  - Contract Measures
    - Total Contracted Uda Activity
    - Total Contracted Uoa Activity
    - Total Contracted Value
    - Total Carry Forward Uda
    - Total Carry Forward Uoa
    - Total Uda Vdp
    - Total Uoa Vdp
    - Total Contract Value Vdp

Result Objects

| Contract Number | Total Contracted Uda Activity | Total Carry Forward Uda |

The data to be returned should include Total Contracted UDA Activity and Total carry Forward UDA

Query Filters

Contracts Year   Equal to   2010/2011

The query should be filtered for the contract year that is of interest, in this case for the 2010/11 year (April 2010 to March 2011)

Activity | Contracted

Using two universes

Rename this query as Contracted
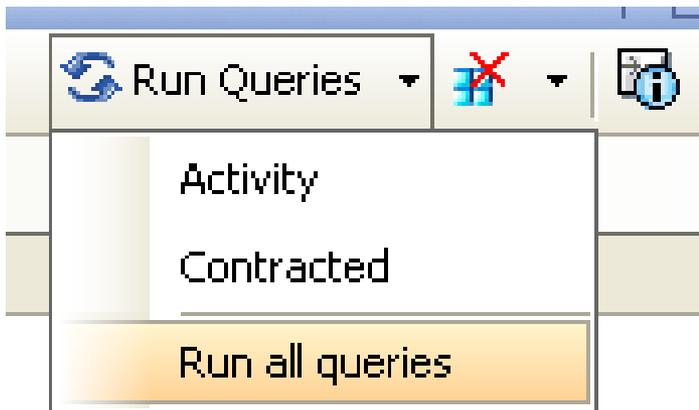
Then run both queries

Select a range of scheduled months and reporting year for the activity query
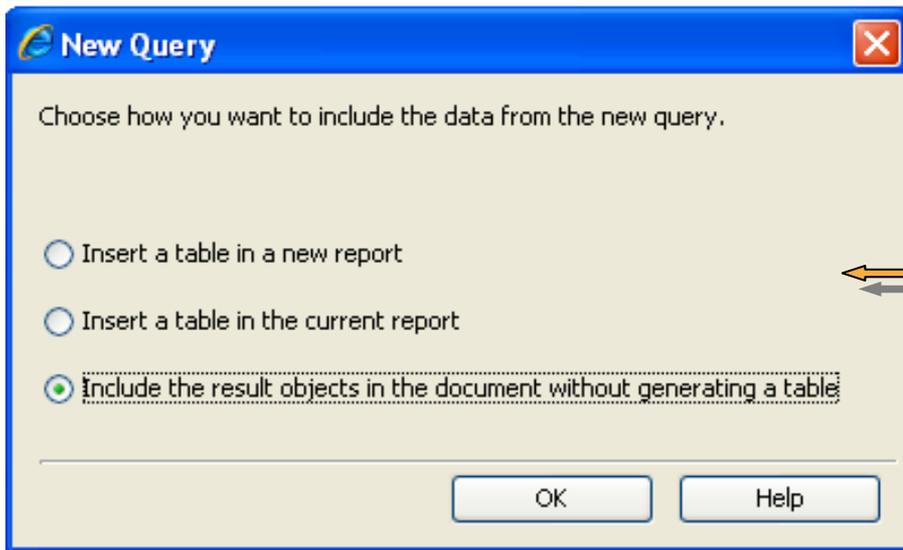
You will be asked how you want the data from the new query to be shown. Select Include the result objects in the document without generating a table

Using two universes

Contract Number	Name or Company Name	General Claim UDA	Total Contracted Uda Activity	Total Carry Forward Uda
XXXXXX/0001	Anon Name	330,073.65	515,761	-3,309
XXXXXX/0002	Anon Name	29,224.55	515,761	-3,309
XXXXXX/0003	Anon Name	12,171.55	515,761	-3,309
XXXXXX/0004	Anon Name	0	515,761	-3,309
XXXXXX/0006	Anon Name	24,209.15	515,761	-3,309
XXXXXX/0012	Anon Name	30,290.15	515,761	-3,309
XXXXXX/0015	Anon Name	72	515,761	-3,309
XXXXXX/0019	Anon Name	342.95	515,761	-3,309

Contracted and Carry Forward UDA are the same figure for each contract, these are totals for the PCO as a whole rather than for each contract. This is due to the fact that data comes from 2 separate universes, therefore we have to join the data

Using two universes

UDA Delivered

Edit Query | Edit Report

To join the data we need to merge common dimensions or elements of the data

Click on the Merge Dimensions button

Merge Dimensions

Use this screen to merge related dimensions from different data providers. Select two or more dimensions, then click 'Merge' to create a merged dimension.

Available Dimensions

Activity - E Reporting Activity	Contracted - E Reporting Contracts
Contract Health Body Code	Contract Number
Contract Health Body Name	
Contract Number	
Name or Company Name	
Schedule Month (YYYYMM)	

Merge Dimensions

Merge
Remove
Values

OK   Cancel   Help

This will allow dimensions to be merged or see what dimensions are already merged

Using two universes

Available Dimensions show which appear in both queries and therefore can be merged. In this example only the Contract Number appears in both

Select the contract number dimensions then click on Merge

Using two universes

Create Merged Dimension

Select a source dimension to provide default properties for the merged dimension:

Source Dimension

Contract Number (Activity - E Reporting Activity)

Merged Dimension Name

Contract Number

Description

Contract Number (6 character Provider Number) plus 4
(Tag starts at 0001 and is sequentially incremented by

Data type: string

Number Format:

OK   Cancel   Help

Choose which of the two contract numbers will be the source dimension i.e. the cases you want to analyse

Choose the name of the merged dimension

Click OK

Using two universes

Contract Number	Name or Company Name	General Claim UDA	Total Contracted Uda Activity	Total Carry Forward Uda
XXXXXX/0001	Anon Name	330,073.65	393,454	-2,524
XXXXXX/0012	Anon Name	30,290.15	41,362	-10
XXXXXX/0002	Anon Name	29,224.55	34,965	-385
XXXXXX/0006	Anon Name	24,209.15	30,000	-23
XXXXXX/0003	Anon Name	12,171.55	14,906	-344
XXXXXX/0019	Anon Name	342.95	466	-23

Using two universes

A variable can be created that shows the % UDA Delivered. To do this first create a variable called Adjusted scheduled activity (UDA) to show activity levels after taking into account any carry forward (General activity scheduled minus Carried forward general activity). Then calculate this as a % of Total Contracted UDA

Data

- UDA Delivered
  - Contract Health Body Code
  - Contract Health Body Name
  - Name or Company Name
  - Schedule Month (YYYYMM)
  - Contract Number
  - % UDA Delivered
  - Adjusted scheduled activity (UDA)
  - Date Range from Prompts
  - General Claim UDA
  - Total Carry Forward Uda
  - Total Contracted Uda Activity
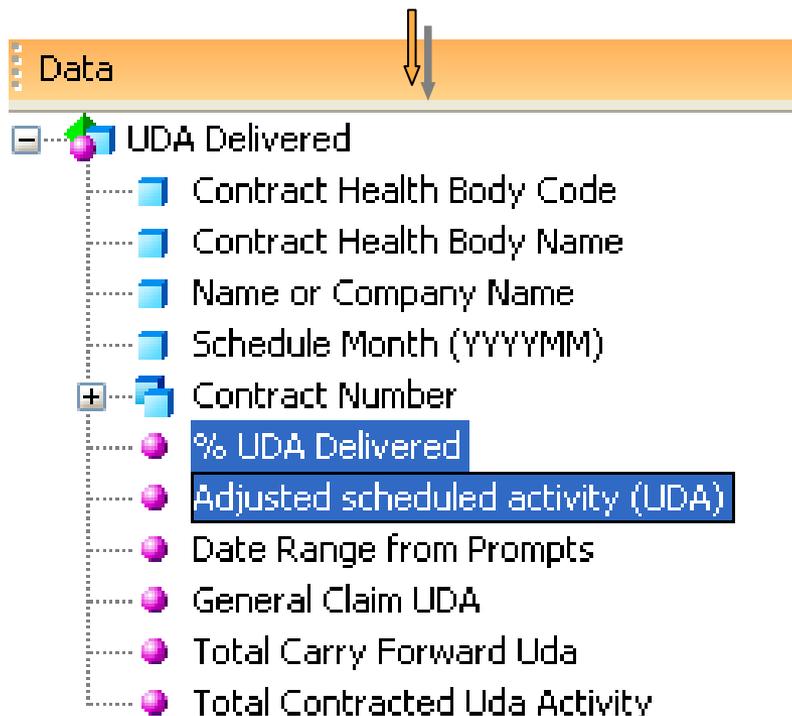
Adjusted scheduled activity (UDA) =[General Claim UDA]-[Total Carry Forward Uda]

% UDA Delivered =Adjusted scheduled activity (UDA)/ Total Contracted UDA Activity

Using two universes

These new variables can now be added to the report. However some contracts may appear with a zero %

Contract Number	Name or Company Name	General Claim UDA	Total Contracted Uda Activity	Total Carry Forward Uda	Adjusted scheduled activity (UDA)	% UDA Delivered
XXXXXX/0001	Anon Name	20,629.85	23,240	666	19,963.85	85.9
XXXXXX/0001	Anon Name	6,816.95	8,488	-52	6,868.95	80.93
XXXXXX/0001	Anon Name		1,249	0	0	0
XXXXXX/0001	Anon Name	30,920.75	35,500	-605	31,525.75	88.8

A zero % indicates that no UDA has been delivered. This could be because:

• the contract is no longer active but the contracted UDAs have not been amended on POL

• the contract has only just opened

• the contract has a start date in the future and therefore would not have performed any courses of treatment.

Using two universes

To look at this issue, the Contract Start and End Dates can be added to **both** queries

Using two universes

By adding the Start and End dates to the report, those contracts with a 0% of UDA Delivered can be investigated

Contract has a start date indicating that it has only just opened, therefore no UDAs have been delivered

Contract Number	Name or Company Name	Contract Start Date	Contract End Date	General Claim UDA	Total Contracted Uda Activity	Total Carry Forward Uda	Adjusted scheduled activity (UDA)	% UDA Delivered
XXXXXX/0001	Anon Name	21/02/2011			1,249	0	0	0
XXXXXX/0013	Anon Name	02/08/2006	01/12/2010		607	0	0	0
XXXXXX/0001	Anon Name	01/04/2006			1,000	0	0	0

Contract has closed

Contract has no end date , has contracted UDA but has not delivered any UDAs in the year. Therefore it is important to check to see if it is indeed still open and that POL details are up to date

Using two universes

Some contracts may appear with a % UDA Delivered value of #DIV/0. This indicates that the contract has no contracted UDAs. Again by adding the Start and End dates to the report, those contracts can be investigated

Contract Number	Name or Company Name	Contract Start Date	Contract End Date	General Claim UDA	Total Contracted Uda Activity	Total Carry Forward Uda	Adjusted scheduled activity (UDA)	% UDA Delivered
XXXXXX/0001	Anon Name	01/04/2006	31/05/2010	99	0	0	99	#DIV/0
XXXXXX/0001	Anon Name	01/04/2006		1	0	0	1	#DIV/0

Contract closed after 2 months of the year, but has no contracted UDA.

Contract has performed 1 UDA in the scheduled year and treatment year

Using two universes

Filters can be applied to the report to restrict the report to contracts who have delivered UDAs in the period or contracts which have contracted UDAs in the period

🔮 Adjusted scheduled activity (UDA) Greater than: 0

🔮 Total Contracted Uda Activity Greater than: 0

An alerter can be applied to highlight those contracts under performing