

## Excel Reports for Chart

Parklane’s new Excel reports are designed, formatted and print-ready. They may also be edited as the user sees fit. Below is a list of reports currently available in **Chart**. *Please read descriptions carefully.*

We recommend viewing the [video](#) provided on Parklane’s Resource Page for information on the reports.

**Special notes:**

- Instruction on the use of Microsoft Excel is *not* available through Parklane Support, however, many helpful tutorials can be found online.

Report Name	Report Code	Report Details
<b>Visits – Year to Date</b>	<b>KHA</b> Visit date Classification Reason 1 Condition 1 Treatment 1 Action 1 Managing Staff Staff Department Group Key	Report automatically pulls statistics in Chart from Jan 1 of <u>current year to current date</u> . <ul style="list-style-type: none"> <li>• Main sheet: Bar chart of number of visits by month, pie chart of percentage of those visits by classification. Pie chart of percentage of those visits by reason. Pie chart of percentage of those visits by condition. Pie chart of percentage of those visits by action. Bar chart of # of visits by Managing staff.</li> <li>• Sheet 2: Table of number of visits by dept/group by month.</li> <li>• Sheet 3: Table of number of visits by managing staff by month.</li> <li>• Sheet 4: Table of visit details including classification, reason, condition, treatment and action and totals by managing staff.</li> </ul>
<b>Visit Trends</b>	<b>KHB</b> Visit date Visit time Union Position Dept Group No active employees in dept group Managing Staff Staff Classification Key	Pull report by visit date range. <ul style="list-style-type: none"> <li>• Main sheet: Chart of number of visits by classification and year. Chart of number of visits by managing staff by year. Chart of visits by union by year. Line graph of total visits by year. Line graph of time trend for all years total.</li> <li>• Sheet 2: Detailed table of dept/group, # of employees, classification and total number of visits by year.</li> <li>• Sheet 3: Number of visits by department and year.</li> <li>• Sheet 4: Number of visits by position and year.</li> <li>• Sheet 5: Number of visits by classification and year.</li> </ul>
<b>Visit Statistics</b>	<b>KHC</b> Visit date Classification Reason Condition Treatment Action Position Union Managing Staff	Pull report by visit date range. <ul style="list-style-type: none"> <li>• Main sheet: Includes bar charts of top ten visits by condition, reason, treatments and actions taken. Pie chart of percentage top managing staff and top position visits.</li> <li>• Sheet 2: Table of all action numbers by year.</li> <li>• Sheet 3: Table of all treatment numbers by year.</li> <li>• Sheet 4: Table of all classification numbers by year.</li> <li>• Sheet 5: Table of managing staff and classification numbers over time period.</li> </ul>

	<p>Staff Dept Group Key</p>	<ul style="list-style-type: none"> <li>• Sheet 6: Table of dept/groups visits, reason for visits and number of those visits.</li> </ul>
<b>Needlestick/Punctures</b>	<p><b>KHD</b></p> <p>Emp ID Last Name First Name Chart Date Position Dept Group Dept Description Classification Reason Managing Staff Staff Condition Treatment Action Union Job Category Other Job Where Where other Department Code Department Source PatientIdentifiable Employee Trained Injured Emp Orig User Sharp Item Sharp Purpose Other Purpose Did Injury Occur Other Injury Occur Device Type Needle Surgical Glass Other Item Brand Manufacturer Model Safety Designed Safety Activated Exposure Employee Key Year End</p>	<p>Report of needlestick data recorded in Chart.</p> <ul style="list-style-type: none"> <li>• Main Sheet: Pie charts of clean/dirty and device type. Bar chart of dirty or clean, bar chart of device type, bar chart of activity during incident. Bar charts of needlestick/punctures by year, whether instrument included safety design, whether safety was activated, time of exposure and whether employee was trained in its use.</li> <li>• Sheet 2: Table of employee position and counts of incidents by year.</li> <li>• Sheet 3: Table of incidents by year and whether instrument was safety designed.</li> <li>• Sheet 4: Table of incidents by department/group. Includes name, chart date, where inc. occurred, the sharp item used, the purpose of item, action taken and counts.</li> </ul>
<b>Blood &amp; Body Fluid</b>	<p><b>KHE</b></p> <p>Emp ID Last Name First Name Chart Date Position Dept Group Dept Description Classification Reason Managing Staff Staff Condition Treatment Action</p>	<p>Report of blood and body fluid data recorded in Chart.</p> <ul style="list-style-type: none"> <li>• Main Sheet: Bar chart of BBF exposures by type. Pie chart of BBF exposures by position and by union.</li> <li>• Sheet 2: Table counts of body fluid types by year.</li> <li>• Sheet 3: Table by department/group. Includes body fluid type by year.</li> <li>• Sheet 4: Table by department/group. Includes date of BBF exposure, name, chart class, job category, chart date, body fluid and counts.</li> <li>• Sheet 5: Table by managing staff. Includes date of exposure, class, name, job category, chart date, body fluid and</li> </ul>

	<p>Union Date of Exposure Date of Exposure Dept Code Department desc Job Category Where Source patient Identifiable Body Fluid Other Contaminated with blood Employee Key Year End</p>	<p>whether the source patient is known.</p> <ul style="list-style-type: none"> <li>• Sheet 6: Table by job category. Includes date of exposure, name, chart date, managing staff name, body fluid, whether the source patient is known and totals.</li> </ul>
<p><b>Comment Activity Report</b></p>	<p><b>KHF</b> Emp ID Last Name First Name Chart Date Chart Time Position Dept Group Dept Description Union Classification Reason 1 Reason 2 Managing Staff Staff Contact Condition 1 Condition 2 Condition 3 Condition 4 Treatment 1 Treatment 2 Treatment 3 Treatment 4 Action 1 Action 2 Action 3 Date of Comment Time of Comment Type of Comment Username Date Comment Entered Employee Key Year End</p>	<p>Activity report can be pulled by chart date or date of chart entry.</p> <ul style="list-style-type: none"> <li>• Main sheet: Bar chart of number of charts created by managing staff and number of comments made. Bar chart of # of charts created and # of comments made in date range. Pie chart of percentage of comments made by managing staff. Data is displayed by Chart Date range.</li> <li>• Sheet 2: Bar chart of number of comments (confidential and general) made by managing staff. Percentage of comments made by managing staff. Comments totals by confidential and general in range. Data is displayed by Chart Date range.</li> <li>• Sheet 3: Table of comment counts sorted by managing staff. Includes date comment entered, date of comment, class of chart, reason, condition and counts of general and confidential comments made.</li> <li>• Sheet 4: Table of comment counts sorted by managing staff. Includes date of chart, name, classification of chart, date of comment and count of general and confidential comments made.</li> </ul>