

# eForms Utilization DASHBOARD

---

JUNE 2021  
TRAINING GUIDE

## Disclaimer

*The contents of the document titled “eForms Utilization Dashboard Training Guide” are proprietary and confidential and intended solely for the recipient. The document should not be copied, reproduced or distributed in whole or in part, nor passed to any third party without the prior written consent of Think Research Corporation. Please feel free to contact us, should you have any questions.*

*Thank you.*



# How to use this training guide

## Introduction to Spotlight

This section will provide you with an understanding of what Spotlight is, and the benefits it provides

## First time login into Entrypoint

If you have never used or logged into Entrypoint before, you must complete this set up to get access into Entrypoint, so that you can view dashboards.

## Existing Entrypoint user

If you have previously logged into Entrypoint, you can log in with your existing username and password

## Accessing dashboards via Spotlight

This section will show you the steps to take to access dashboards via Spotlight, after you have logged into Entrypoint

## Dashboard Instructions

This section will show you the toolbar selections that can be used to view data

## Dashboard Functionality

This section covers dashboard functionality on Spotlight that can be used to view data more easily.

## Interacting with Dashboards

This section will show you ways to interact with the dashboard data i.e. take snapshots, share, download

## Tier 1 Dashboard: single-site

This section will show you relevant dashboard information for an individual site

# Introduction to Spotlight



**Spotlight is Think Research's analytics tool that provides real-time metrics on user data and trends:**

These analytics can help us:

- Understand real-time user information to measure quality improvement
- Drive immediate and longer-term change management improvements
- Gain better insights into resource utilization and iterate on outcomes



# First Time Login

## Set Up Your EntryPoint Password

# First Time Login: Set up your EntryPoint Password

1. Enter your username (e-mail address) in the “Sign in” box
2. Select *Forgot your password?*



## Sign in

---

Username

Password

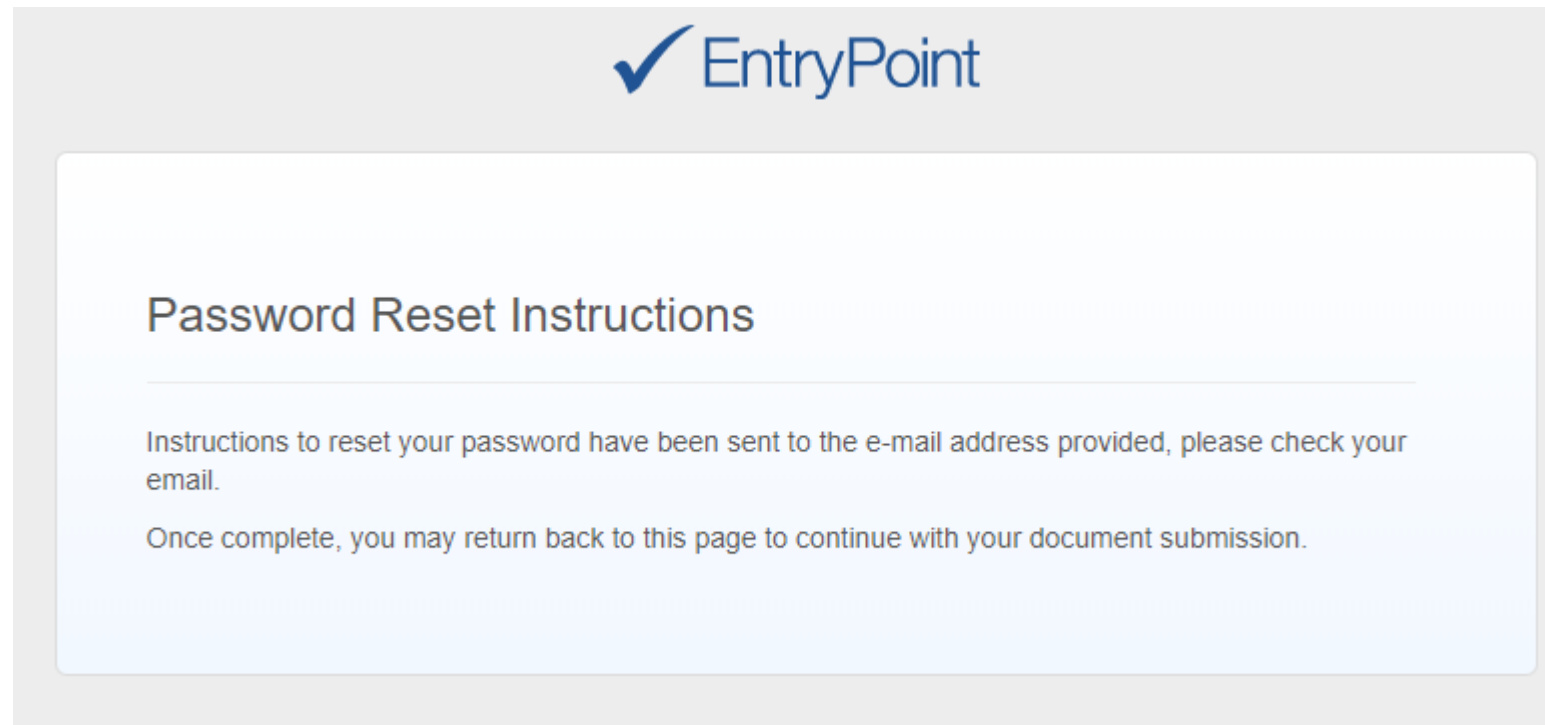
Sign in

---

Forgot your password?

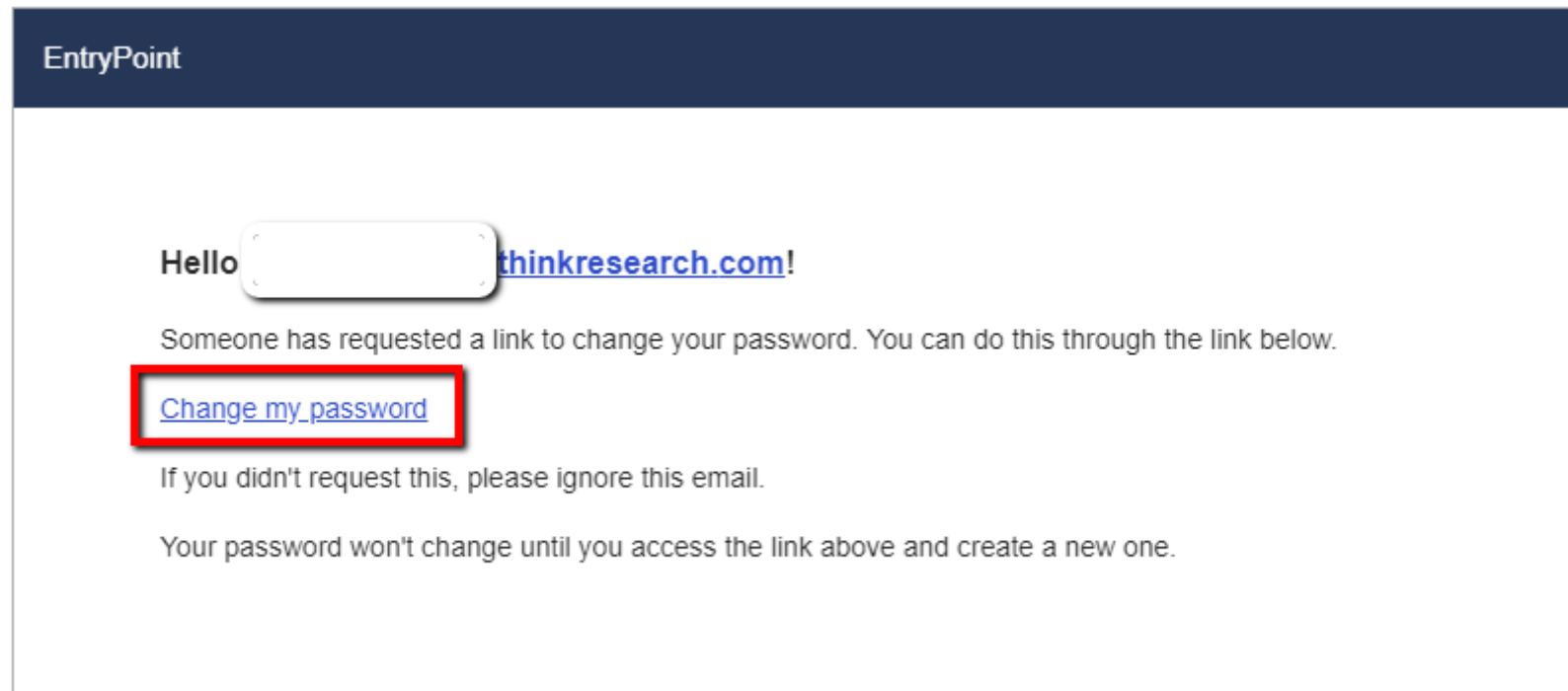
# First Time Login: Set up your EntryPoint Password

1. You will be prompted:



# First Time Login: Set up your EntryPoint Password


1. Next, you will receive an e-mail notification where you will select Change my password





# First Time Login: Set up your EntryPoint Password

## 1. Input New Password



Change your password

---

New Password

Confirm

Change my password

# Existing User: Log into Entrypoint



# Existing user: Log into Entrypoint

1. Enter your e-mail address in the “username” field
2. Enter your password in the “password” field

*If you have forgotten your password, you may click on “Forgot your password?”, and a set of instructions will be sent to your email address.*



## Sign in

Username

Password

Sign in

[Forgot your password?](#)

# Accessing dashboards via Spotlight

# Accessing dashboards via Spotlight

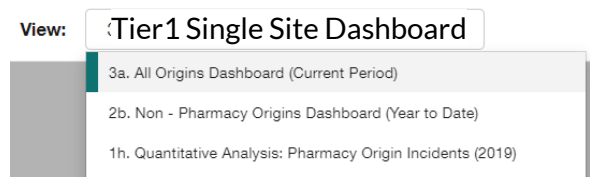
- 1 Select "Spotlight" from the top navigation pane



- 2 Select the 'eForms' button

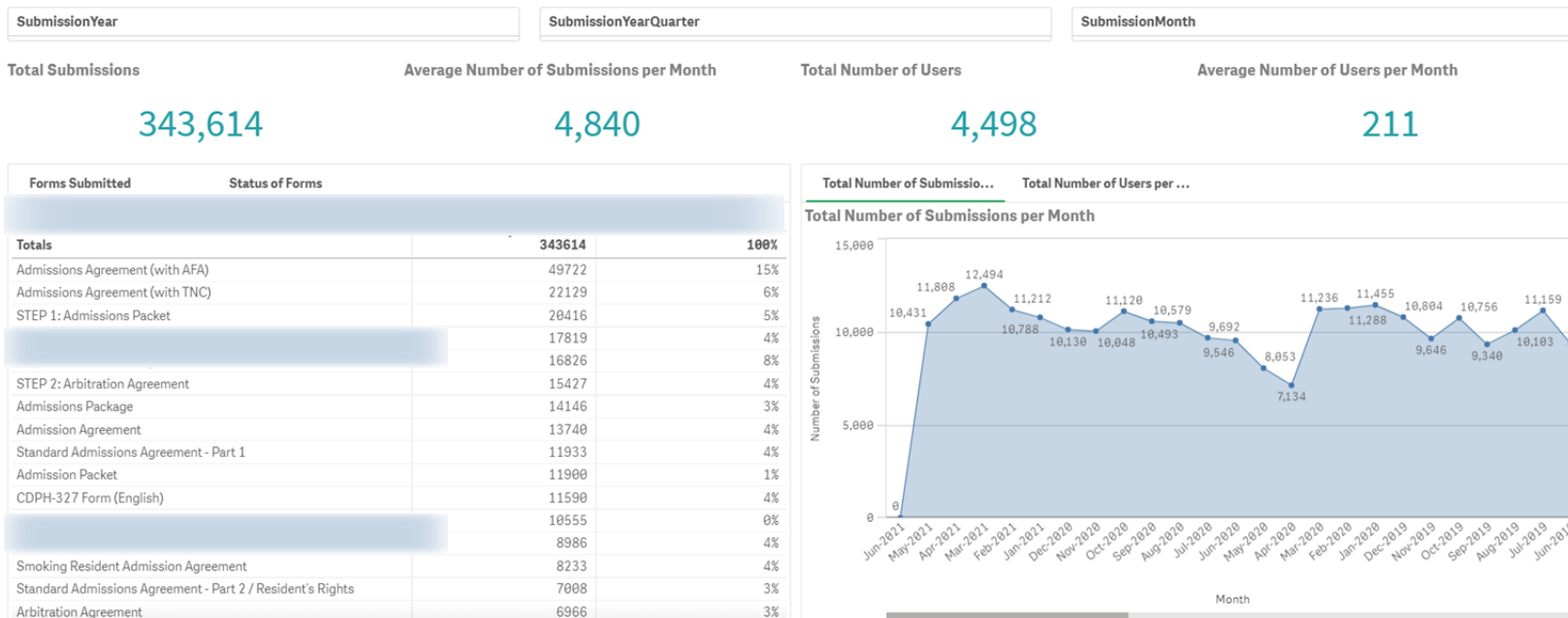


- 3 Depending on how many dashboards you have access to, there will be a drop down to select different dashboards. Select correct dashboard via dropdown



- 4 View selected Dashboard (there might be a dropdown menu for you to select the correct dashboard)

## Tier1 Single Site Dashboard



# Interacting with Dashboards

# Dashboard Instructions: Toolbar selections

15

- By default, dashboards will show all data collected for your facility.

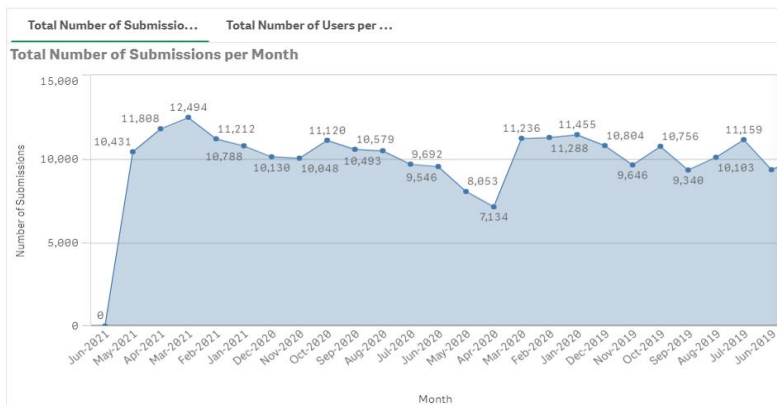
Total Submissions  
**343,614**

Average Number of Submissions per Month  
**4,840**

Total Number of Users  
**4,498**

- Use Filters and graph selections to refine your search.

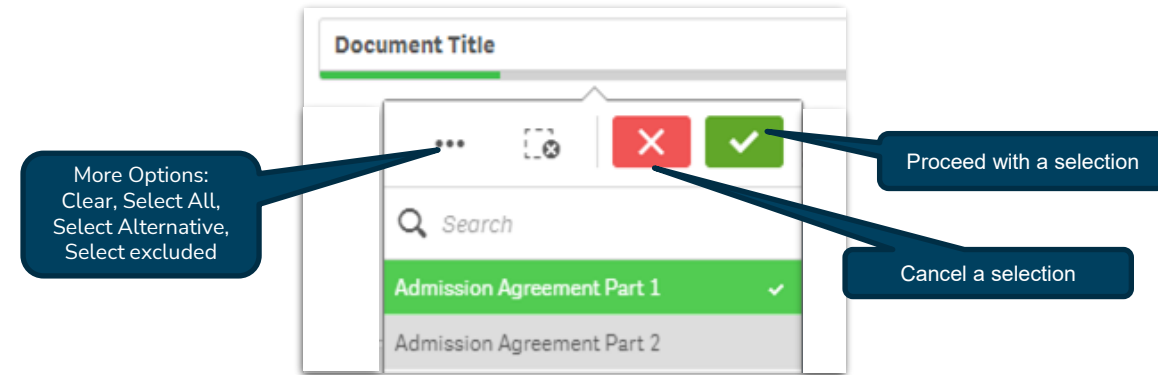
SubmissionYear SubmissionYearQuarter SubmissionMonth **FILTERS**



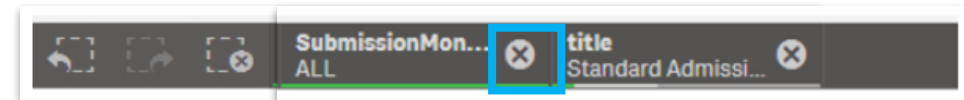
- All selected filters are reflected in the grey bar at the top of the dashboard.

SubmissionMon... title Standard Admissi...

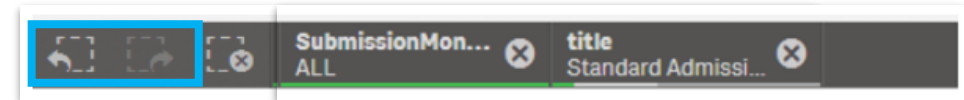
- To apply the filter, select the option, then select the green check mark.



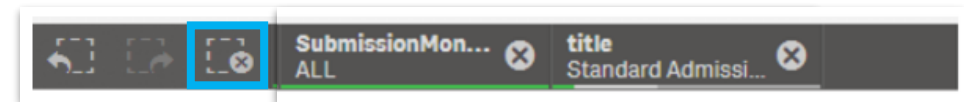
- To remove the filter, select the X in the grey bar.



- Use the Filter Undo and Redo buttons to remove and reapply filters.

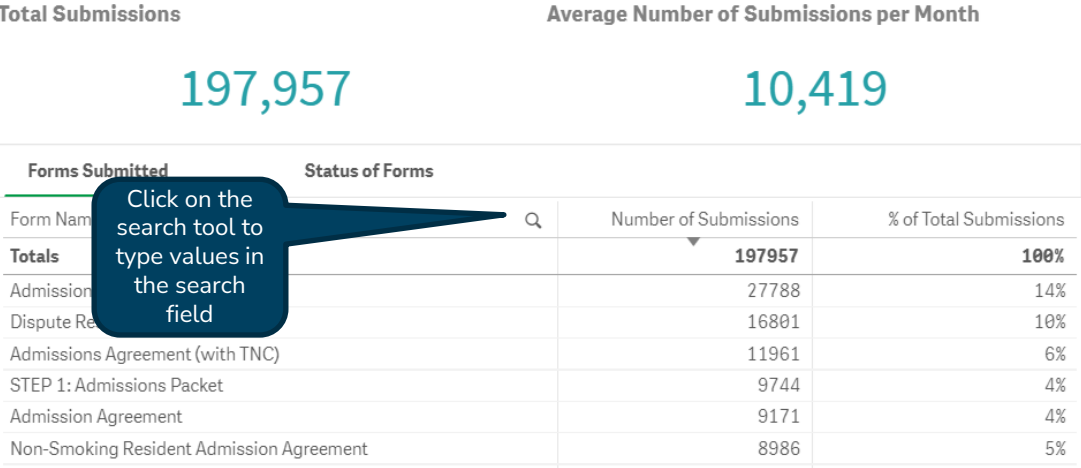


- Use the Filter Remove button to eliminate all filters that have been applied.



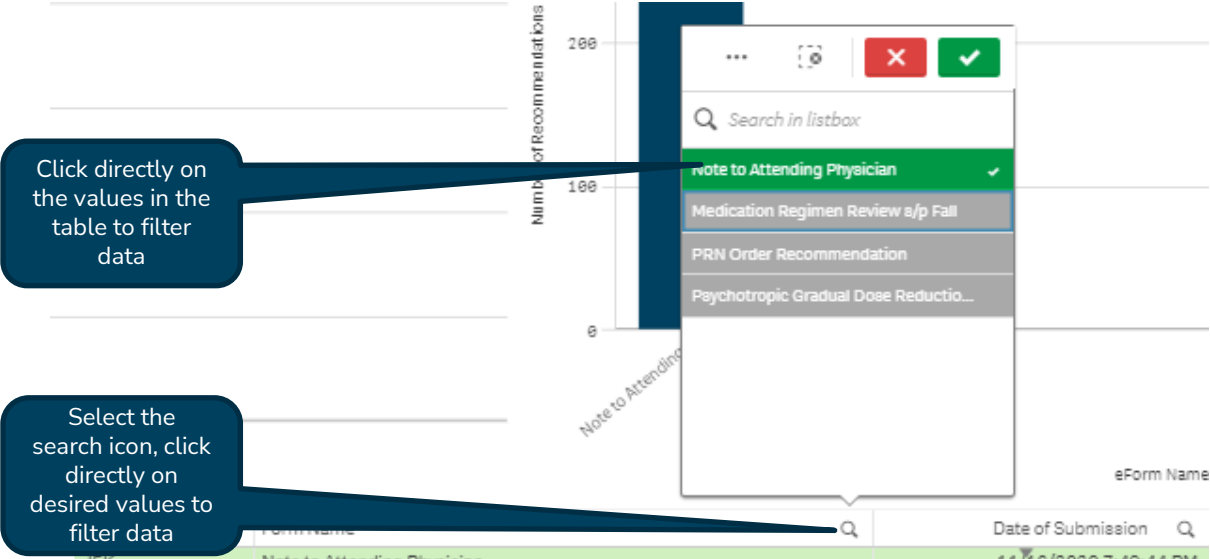
# Dashboard Functionality

## 1 Search Functionality

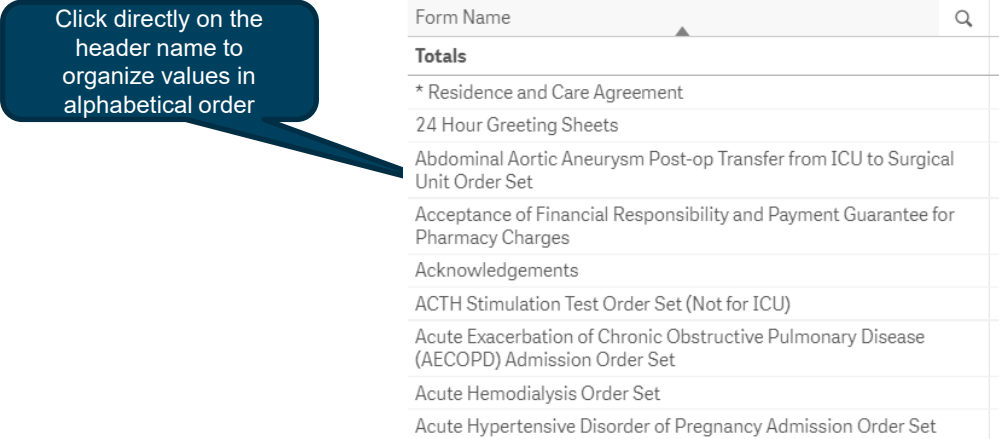


Click on the search tool to type values in the search field

## 2 Filter Functionality



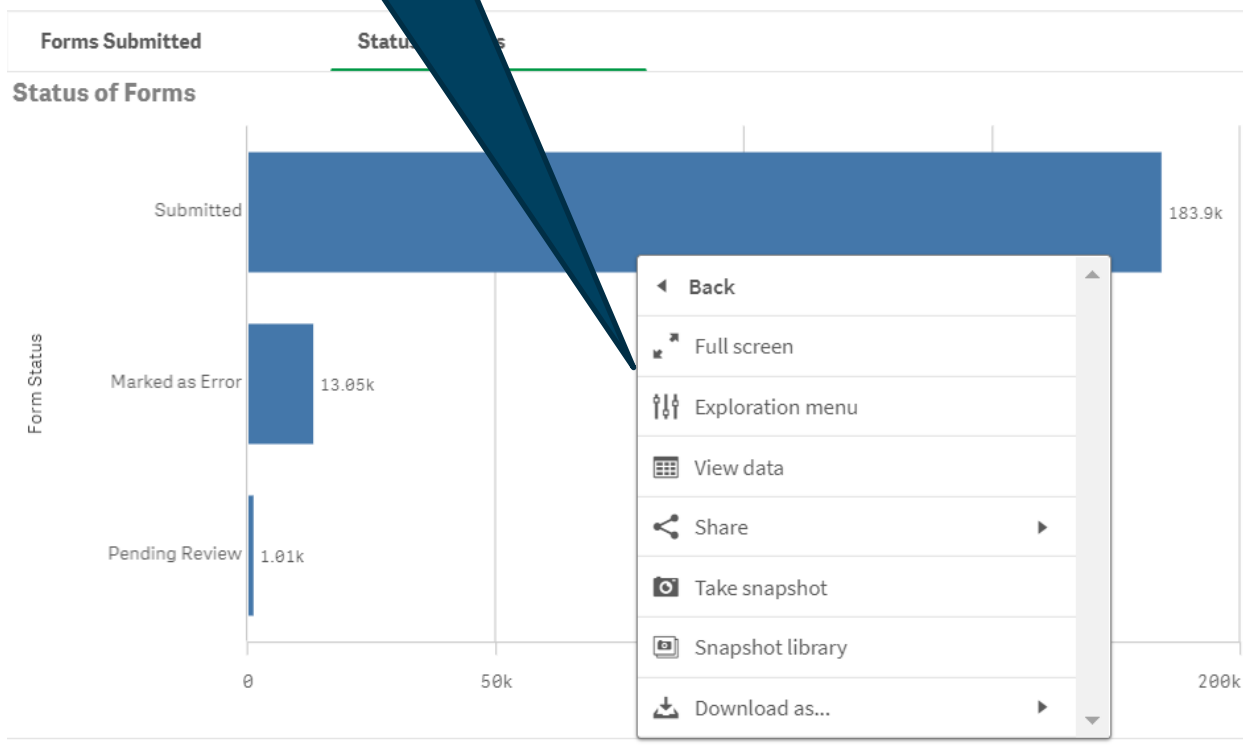
## 3 Sorting Functionality



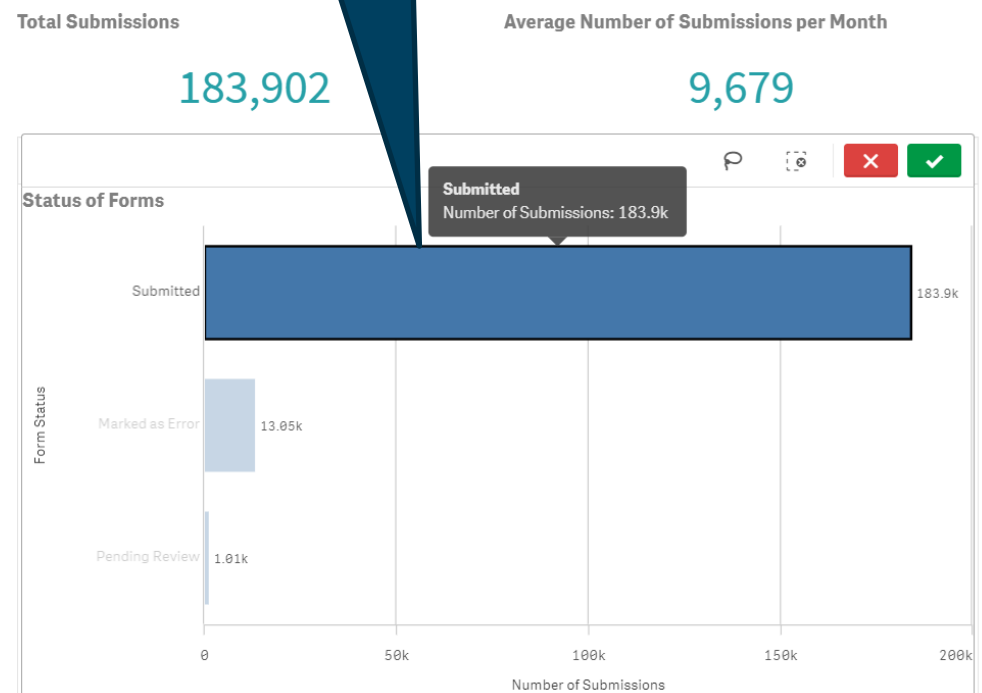


# Interacting with Dashboards

Right click on the graph or table to view more options



Click directly on a graph to view the results. Hover the mouse over a graph to see display information



# Tier 1 Dashboard: Single-site

# TIER 1 Dashboard: Single Site

This dashboard will illustrate submission trends.

## Tier1 Single Site Dashboard

SubmissionYear

SubmissionYearQuarter

SubmissionMonth

Total Submissions

Average Number of Submissions per Month

343,614

4,840

Total Number of Users

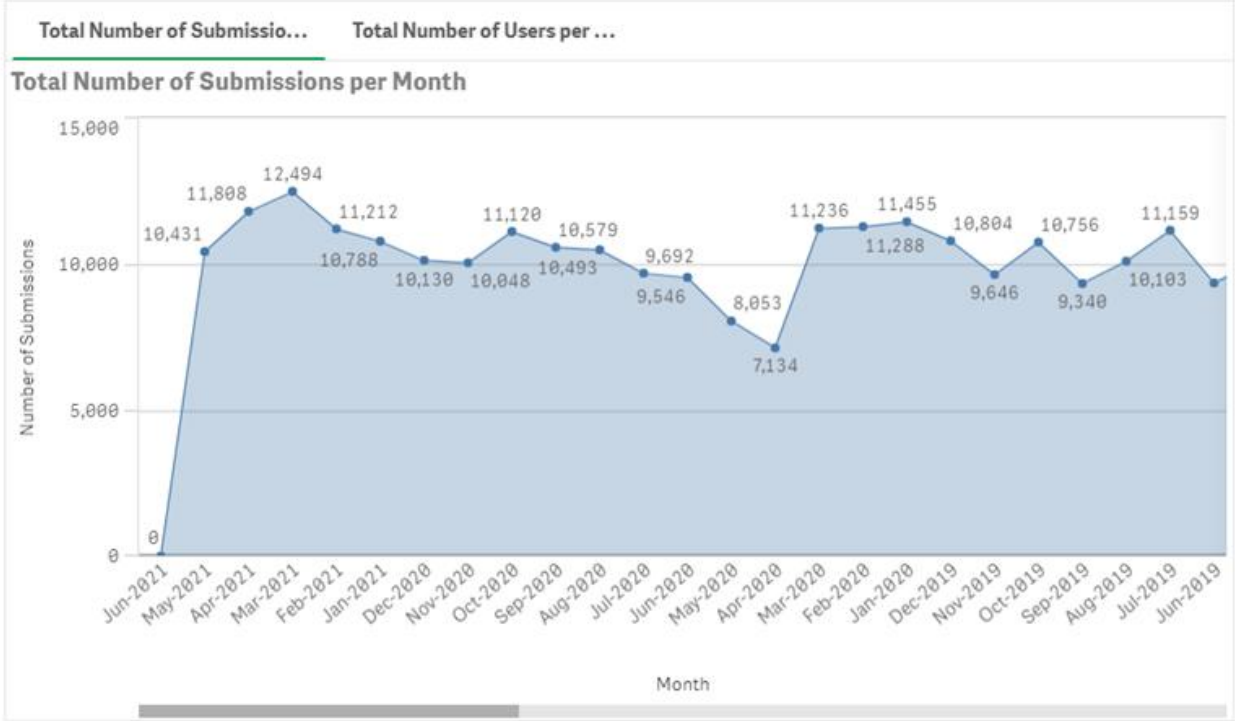
Average Number of Users per Month

4,498

211

Forms Submitted		Status of Forms	
Form Name		Number of Submissions	% of Total Submissions
Totals		343614	100%
Admissions Agreement (with AFA)		49722	15%
Admissions Agreement (with TNC)		22129	6%
STEP 1: Admissions Pack			5%
Dispute Resolution Progr			8%
STEP 2: Arbitration Agree			4%
Admissions Package			3%
Admission Agreement			4%
Standard Admissions Agr			4%
Admission Packet		11900	1%
CDPH-327 Form (English)		11590	4%
Non-Smoking Resident Admission Agreement		8986	4%
Smoking Resident Admission Agreement		8233	4%
Standard Admissions Agreement - Part 2 / Resident's Rights		7008	3%
Arbitration Agreement		6966	3%

These numbers indicate how many submissions your site has had. This is broken down into total and average per month.



# TIER 1 Dashboard: Single Site

This dashboard will illustrate submission trends.

## Tier1 Single Site Dashboard

SubmissionYear

SubmissionYearQuarter

SubmissionMonth

Total Submissions

343,614

Average Number of Submissions per Month

4,840

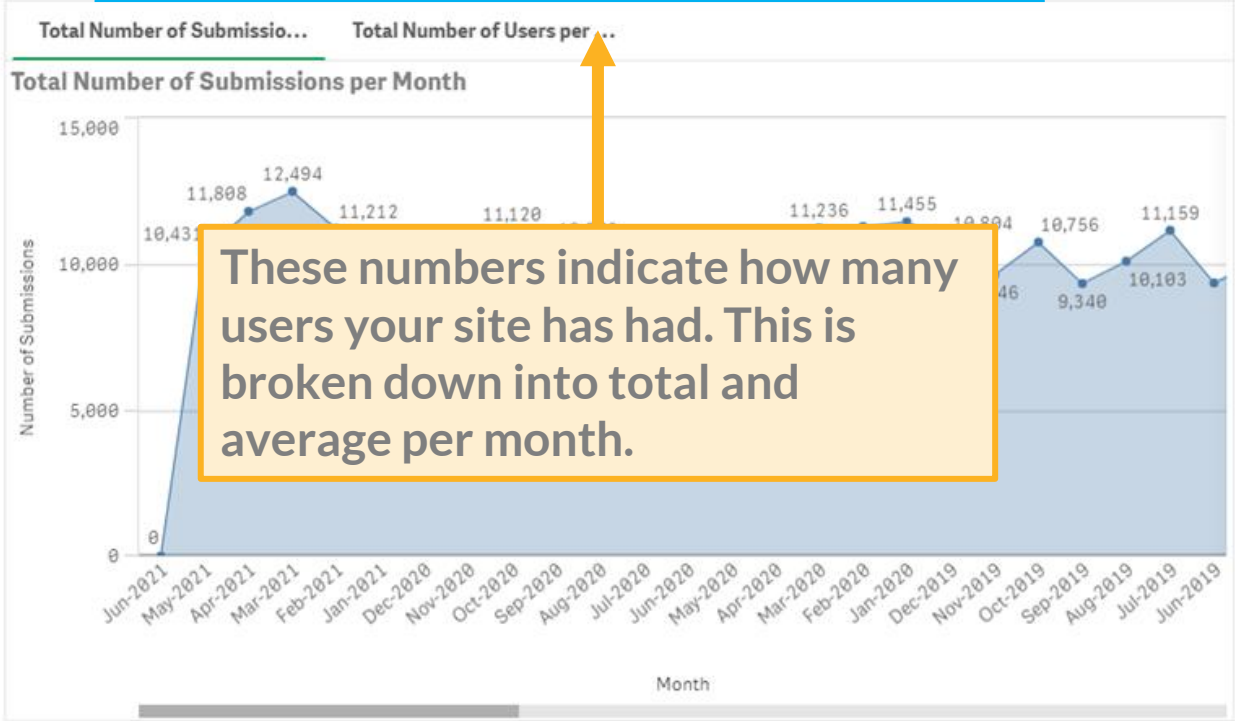
Total Number of Users

4,498

Average Number of Users per Month

211

Forms Submitted		Status of Forms	
Form Name	Q	Number of Submissions	% of Total Submissions
Totals		343614	100%
Admissions Agreement (with AFA)		49722	15%
Admissions Agreement (with TNC)		22129	6%
STEP 1: Admissions Packet		20416	5%
Dispute Resolution Program		16826	8%
STEP 2: Arbitration Agreement		15427	4%
Admissions Package		14146	3%
Admission Agreement		13740	4%
Standard Admissions Agreement - Part 1		11933	4%
Admission Packet		11900	1%
CDPH-327 Form (English)		11590	4%
Non-Smoking Resident Admission Agreement		8986	4%
Smoking Resident Admission Agreement		8233	4%
Standard Admissions Agreement - Part 2 / Resident's Rights		7008	3%
Arbitration Agreement		6966	3%



# TIER 1 Dashboard: Single Site

This dashboard will illustrate submission trends.

Tier1 Single Site Dashboard

SubmissionYear

SubmissionYearQuarter

SubmissionMonth



Forms Submitted

Status of Forms

Form Name

Number of S

Totals

Admissions Agreement (with AFA)

Admissions Agreement (with TNC)

STEP 1: Admissions Packet

Dispute Resolution Program

STEP 2: Arbitration Agreement

Admissions Package

Admission Agreement

Standard Admissions Agreement - Part 1

Admission Packet

CDPH-327 Form (English)

Non-Smoking Resident Admission Agreement

Smoking Resident Admission Agreement

Standard Admissions Agreement - Part 2 / Resident's Rights

Arbitration Agreement

16826

15427

14146

13740

11933

11900

11590

8986

8233

7008

6966

8%

4%

3%

4%

4%

1%

4%

4%

4%

3%

3%

total Number of Users per ...

er Month

Number of Submissi

5,000

0

Jun-2021

May-2021

Apr-2021

Mar-2021

Feb-2021

Jan-2021

Dec-2020

Nov-2020

Oct-2020

Sep-2020

Aug-2020

Jul-2020

Jun-2020

May-2020

Apr-2020

Mar-2020

Feb-2020

Jan-2020

Dec-2019

Nov-2019

Oct-2019

Sep-2019

Aug-2019

Jul-2019

Jun-2019

Month

These are filters. By clicking on these filters, you will be able to filter the data based on the name of the filter.



# TIER 1 Dashboard: Single Site

This dashboard will illustrate submission trends.

## Tier1 Single Site Dashboard

SubmissionYear

SubmissionYearQuarter

SubmissionMonth

Total Submissions

Average Number of Submissions per Month

Total Number of Users

Average Number of Users per Month

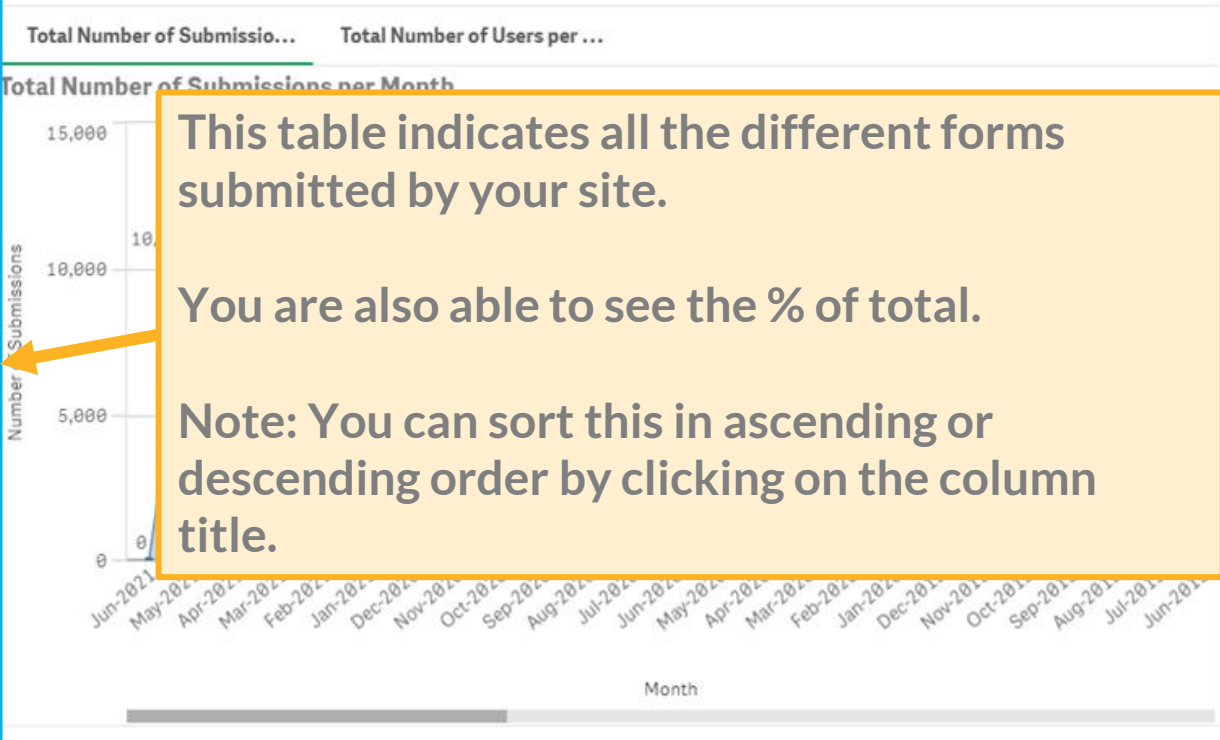
343,614

4,840

4,498

211

Forms Submitted		Status of Forms	
Form Name		Number of Submissions	% of Total Submissions
Totals		343614	100%
Admissions Agreement (with AFA)		49722	15%
Admissions Agreement (with TNC)		22129	6%
STEP 1: Admissions Packet		20416	5%
Dispute Resolution Program		16826	8%
STEP 2: Arbitration Agreement		15427	4%
Admissions Package		14146	3%
Admission Agreement		13740	4%
Standard Admissions Agreement - Part 1		11933	4%
Admission Packet		11900	1%
CDPH-327 Form (English)		11590	4%
Non-Smoking Resident Admission Agreement		8986	4%
Smoking Resident Admission Agreement		8233	4%
Standard Admissions Agreement - Part 2 / Resident's Rights		7008	3%
Arbitration Agreement		6966	3%



Tier1 Single Site Dashboard

SubmissionYear

SubmissionYearQuarter

SubmissionMonth

Total Submissions

Average Number of Submissions per Month

Total Number of Users

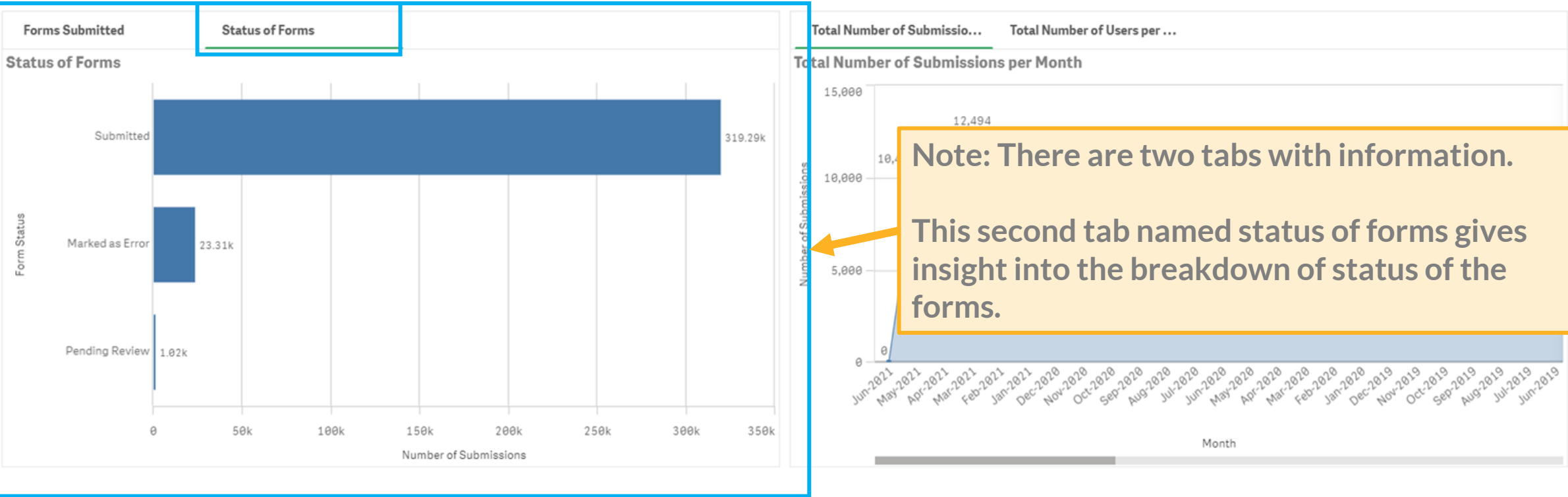
Average Number of Users per Month

343,614

4,840

4,498

211





# TIER 1 Dashboard: Single Site

This dashboard will illustrate submission trends.

## Tier1 Single Site Dashboard

SubmissionYear

SubmissionYearQuarter

SubmissionMonth

Total Submissions

343,614

Average Number of Submissions per Month

4,840

Total Number of Users

4,498

Average Number of Users per Month

211

Forms Submitted	Status of Forms
For	Submissions
Tot	100%
Adi	15%
Adi	6%
STI	5%
Dis	8%
STI	3%
Adi	4%
Adi	4%
Sta	1%
Adi	4%
CD	4%
No	4%
Smoking Resident Admission Agreement	8233 4%
Standard Admissions Agreement - Part 2 / Resident's Rights	7008 3%
Arbitration Agreement	6966 3%

This graph indicates the total number of submissions for each month.

There is a scroll bar on the bottom of the graph to view older months.

You are also able to select a portion of the graph by clicking and dragging your mouse over all the months you would like to filter to.





# TIER 1 Dashboard: Single Site

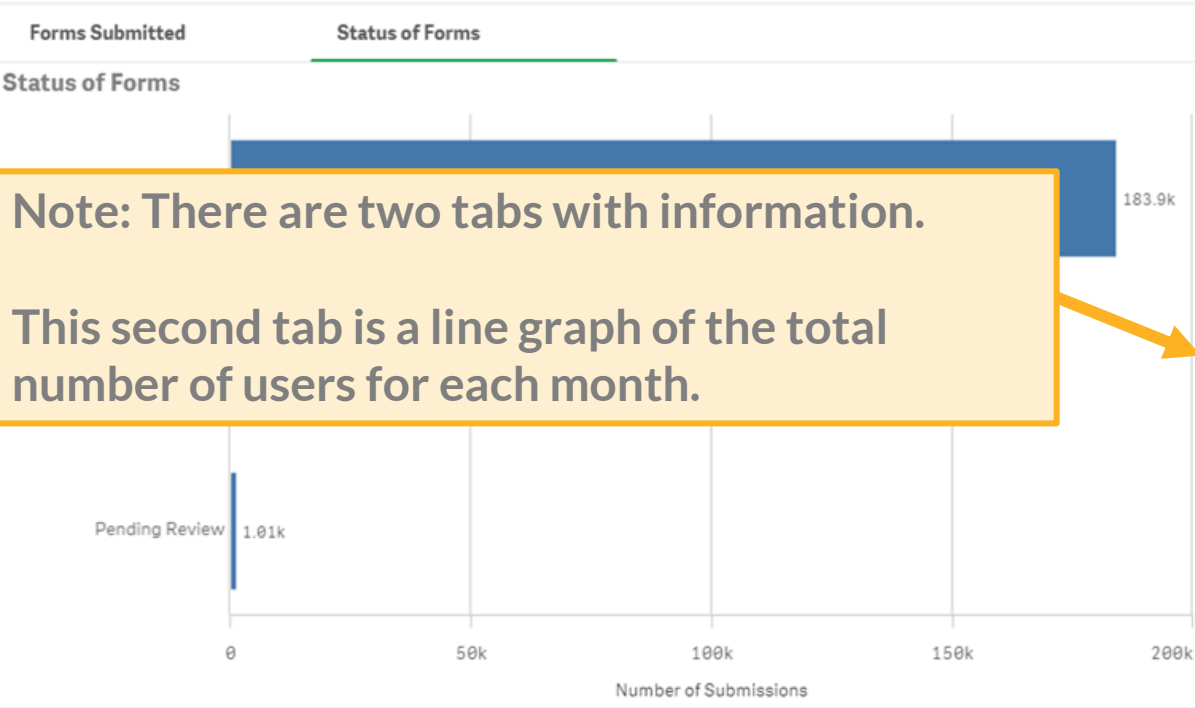
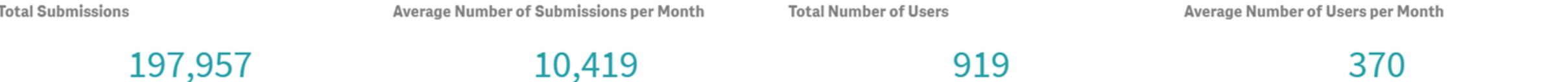
This dashboard will illustrate submission trends.

Tier1 Single Site Dashboard

SubmissionYear

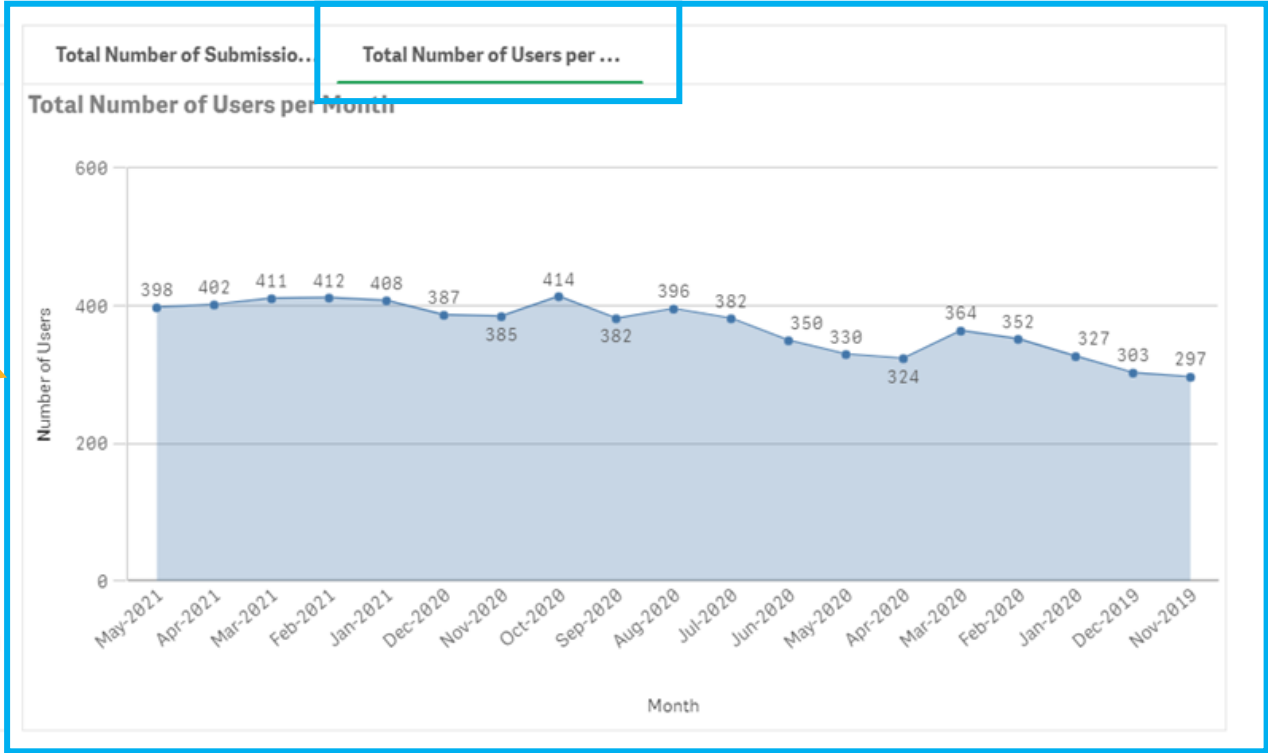
SubmissionYearQuarter

SubmissionMonth



Note: There are two tabs with information.

This second tab is a line graph of the total number of users for each month.



You have now reached the end of the eForms Utilization Dashboard Training Guide



Experiencing Technical Issues?

Help Desk - Think Research

[techsupport@thinkresearch.com](mailto:techsupport@thinkresearch.com)



Questions or Concerns?

Please contact your Engagement Manager