

CBI Dashboard – Advanced (Tier 2)



Course Overview

CorrecTek Business Intelligence (CBI) Dashboards display preconfigured clinical and operational metrics in Microsoft Power BI, such as chronic care follow-ups, medication compliance, and response times.

This quick-start guide covers how to navigate, filter, and analyze data in the Advanced (Tier 2) CBI dashboards. Before you begin, ensure you have active access to Microsoft Power BI and the CBI application. Contact your administrator if you need access.

Use This Guide When

- Learning how to move between CBI Dashboard pages using the Page Selector
- Refining or customizing data views using interactive filters, sliders, and visual cross-filtering
- Troubleshooting unexpected data results by checking active breadcrumbs or resetting page filters back to default settings
- Clarifying data definitions or metrics displayed across different sections of the dashboard via the Reference Page

What You'll Be Able to Do

- Apply and track filters seamlessly using buttons, dropdowns, sliders, and the top breadcrumbs bar
- Cross-filter report visuals directly on the page to analyze specific data points or change viewing criteria
- Manage filter states and understanding which selections persist across pages and how to reset individual pages to default
- Navigate and reference dashboard pages effectively to interpret and draw accurate insights

CBI Dashboard – Advanced (Tier 2)



Topics Covered

Course Overview	1
Use This Guide When.....	1
What You'll Be Able to Do.....	1
Getting Started with CBI	3
Open the CBI Dashboard in Power BI	4
CBI Dashboards	5
Page Selector	6
Apply Filters.....	7
Visual Elements.....	8
Reset Page.....	11
Reference Page	12

CBI Dashboard – Advanced (Tier 2)

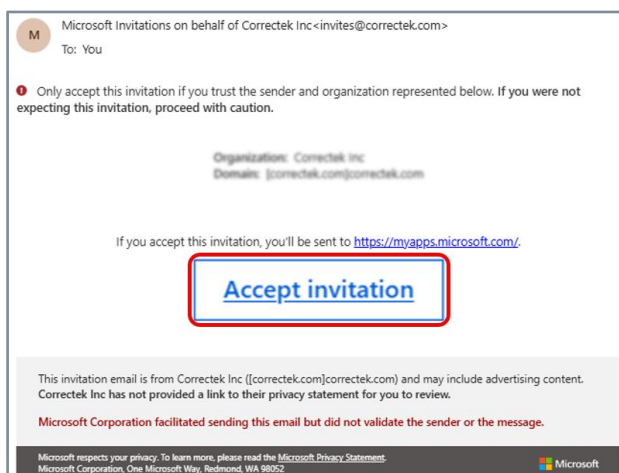


Getting Started with CBI

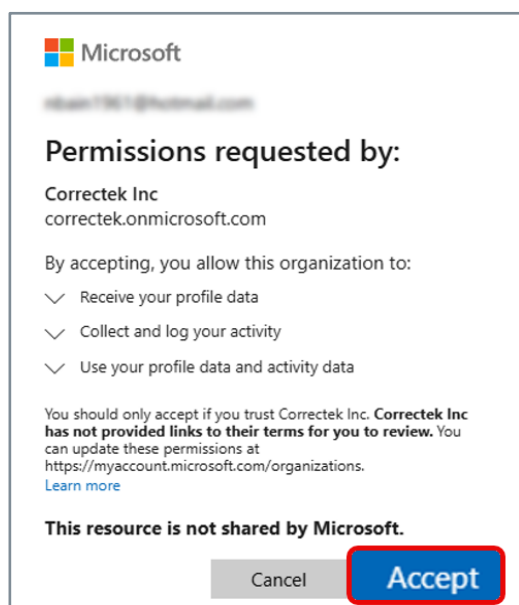
After CorrecTek configures access, each user will receive an email invitation from Microsoft.

To complete access setup:

- Select **Accept Invitation** from the email
- Sign in with their Microsoft account
- Approve the requested permissions



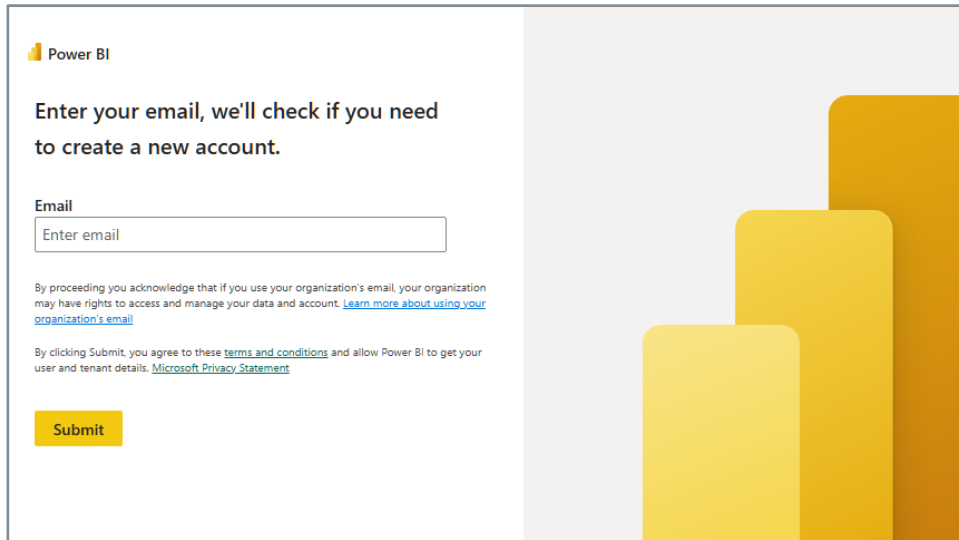
Tip: If you do not see the email, check your spam or junk folder.



CBI Dashboard – Advanced (Tier 2)

Open the CBI Dashboard in Power BI

Go to <https://app.powerbi.com> and sign in with your Microsoft account.



Power BI

Enter your email, we'll check if you need to create a new account.

Email

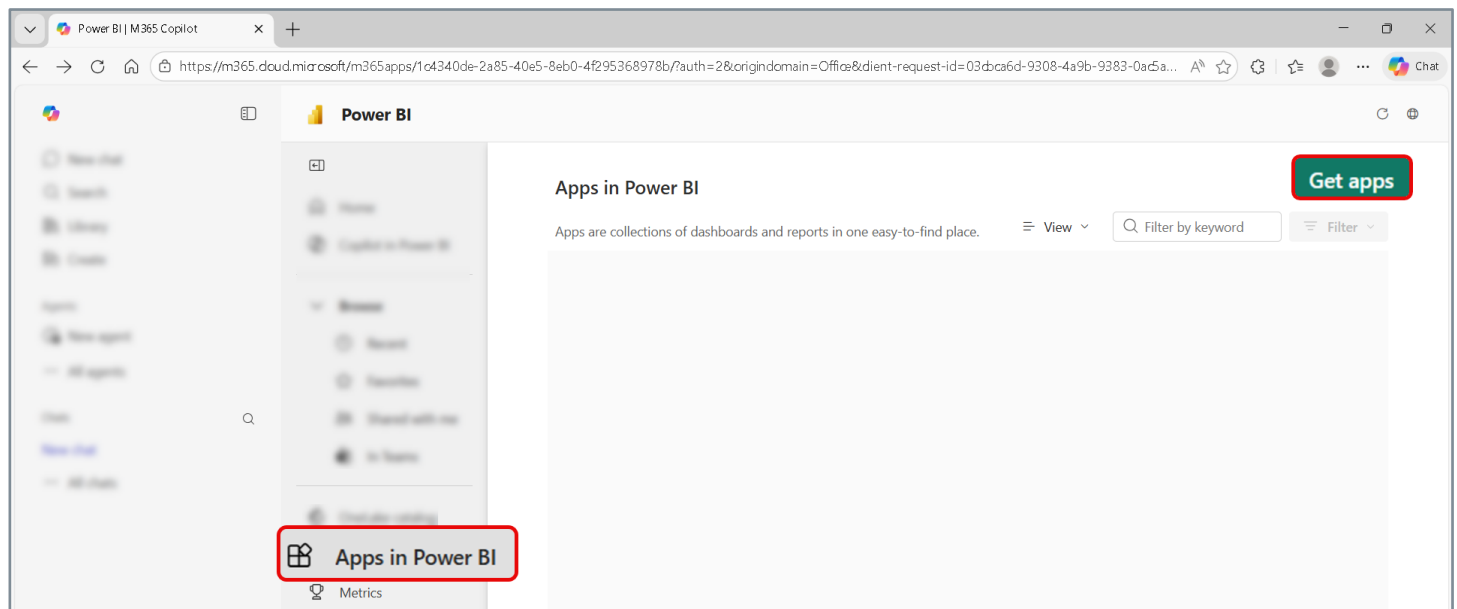
By proceeding you acknowledge that if you use your organization's email, your organization may have rights to access and manage your data and account. [Learn more about using your organization's email](#)

By clicking Submit, you agree to these [terms and conditions](#) and allow Power BI to get your user and tenant details. [Microsoft Privacy Statement](#)

Submit

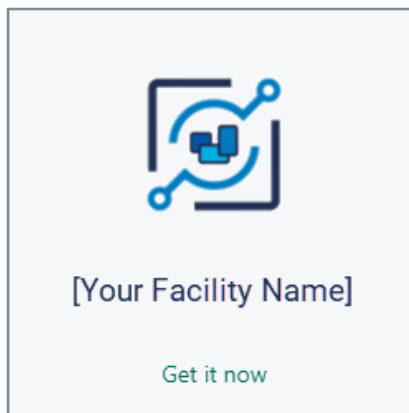
Open the CBI Application

- Select **Apps in Power BI** from the navigation menu
- Select **Get apps**



CBI Dashboard – Advanced (Tier 2)

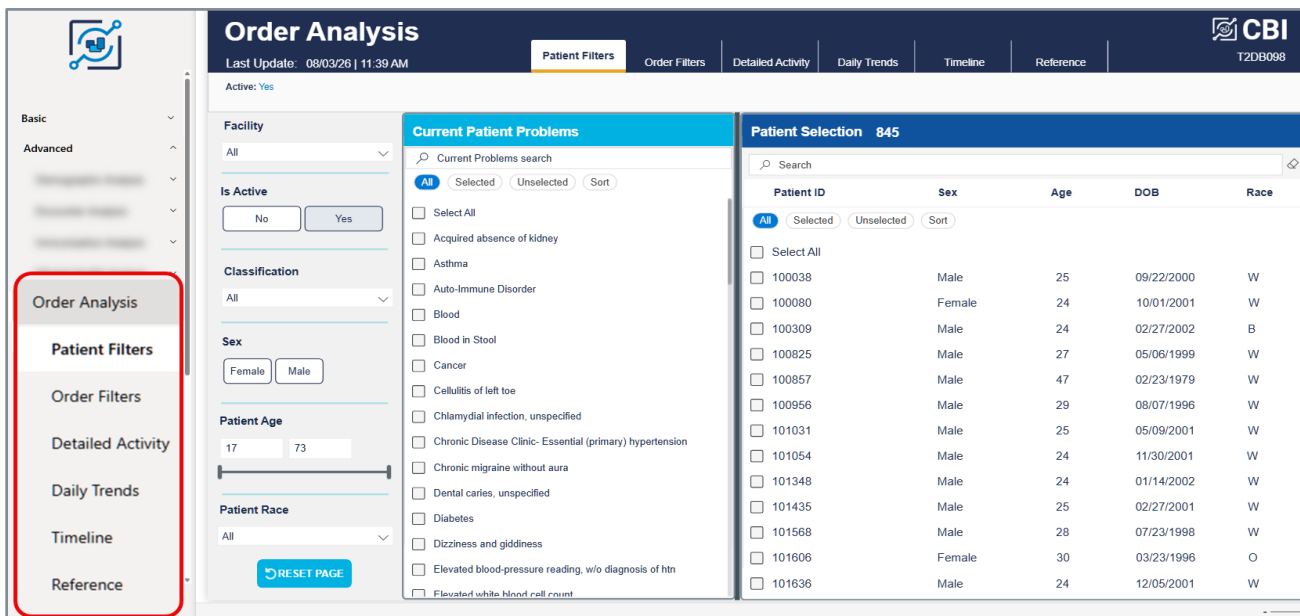
- Locate the CBI application for your facility
- Select **Get it now**, then open the application



| Tip: After selecting **Get it now**, the CBI app will remain available under Apps for future access.

CBI Dashboards

Available dashboards display on the left. Select the name of the **Dashboard** you would like to view.

A screenshot of the CBI Order Analysis dashboard. The dashboard has a dark blue header with the CBI logo and the text "T2DB098". Below the header, there are tabs for "Patient Filters", "Order Filters", "Detailed Activity", "Daily Trends", "Timeline", and "Reference". The "Patient Filters" tab is currently selected. On the left side, there is a sidebar with a list of dashboard options: "Basic", "Advanced", "Order Analysis", "Patient Filters", "Order Filters", "Detailed Activity", "Daily Trends", "Timeline", and "Reference". The "Order Analysis" option is highlighted with a red box. The main content area of the dashboard is divided into three sections: "Facility", "Current Patient Problems", and "Patient Selection". The "Facility" section has a dropdown menu for "All" and buttons for "Is Active" (No, Yes). The "Current Patient Problems" section has a search bar and a list of checkboxes for various medical conditions. The "Patient Selection" section has a search bar and a table of patient data. The table has columns for "Patient ID", "Sex", "Age", "DOB", and "Race". The table contains 15 rows of patient data.

Patient ID	Sex	Age	DOB	Race
100038	Male	25	09/22/2000	W
100080	Female	24	10/01/2001	W
100309	Male	24	02/27/2002	B
100825	Male	27	05/06/1999	W
100857	Male	47	02/23/1979	W
100956	Male	29	08/07/1996	W
101031	Male	25	05/09/2001	W
101054	Male	24	11/30/2001	W
101348	Male	24	01/14/2002	W
101435	Male	25	02/27/2001	W
101568	Male	28	07/23/1998	W
101606	Female	30	03/23/1996	O
101636	Male	24	12/05/2001	W

CBI Dashboard – Advanced (Tier 2)



Advanced Dashboards consist of multiple specialized pages to help you explore and refine your data.

Key pages include:

- **Patient Filters:** Present on every Advanced dashboard to establish baseline patient demographics and criteria
- **Detailed Activity:** Various intermediate pages (e.g., Detailed Activity) that allow you to dive deeper into specific operational or clinical metrics
- **Reference:** Provides definitions and clarification for the data displayed across all pages in the Dashboard

Tip: Some Advanced dashboards include secondary filter pages, such as **Order Filters**, which allow you to refine specific order types, statuses, or dates on top of your baseline Patient Filters.

Page Selector

Use the **Page Selector** at the top of the dashboard to move between different pages and reports.

Order Analysis
Last Update: 08/03/26 | 11:58 AM

Patient Filters | Order Filters | Detailed Activity | Daily Trends | Timeline | Reference | CBI T2DB098

Active: Yes > Sex: Male > Earliest Age: 41 > Oldest Age: 50 > Current Problems: Diabetes

Facility
All

Is Active
No Yes

Classification
All

Sex
Female Male

Patient Age
40 50

Patient Race
All

Current Patient Problems
Current Problems search
All Selected Unselected Sort
Select All
☐ Acquired absence of kidney
☐ Cancer
☐ Chlamydial infection, unspecified
☐ Chronic Disease Clinic- Essential (primary) hypertension
☒ Diabetes
☐ Elevated white blood cell count
☐ Encntr for general adult medical exam w/o abnormal findings
☐ Encntr screen for infections w sexl mode of transmiss
☐ Encounter for general adult medical examination
☐ Encounter for screening for oth suspected endocrine disorder
☐ Encounter for screening for other viral diseases
☐ Frequency of micturition
☐ Gastro-esophageal reflux disease
☐ Gastrointestinal
☐ Gonorrhea Unspecified

Patient Selection 10
Search
All Selected Unselected Sort
Select All

Patient ID	Sex	Age	DOB	Race
☐ 104582	Male	41	09/01/1984	B
☐ 109787	Male	45	02/08/1981	S
☐ 112675	Male	41	09/19/1984	B
☐ 41233	Male	50	12/10/1975	W
☐ 44652	Male	48	08/22/1977	B
☐ 55050	Male	45	08/25/1980	W
☐ 55273	Male	46	03/07/1980	W
☐ 59531	Male	46	10/18/1979	W
☐ 67483	Male	44	12/29/1981	W
☐ 72819	Male	45	02/11/1981	W

RESET PAGE

CBI Dashboard – Advanced (Tier 2)

Apply Filters

Refine your data across the dashboard using the available buttons, dropdowns, and sliders.

Order Analysis

Last Update: 08/04/26 | 08:29 AM

Patient Filters | Order Filters | Detailed Activity | Daily Trends | Timeline | Reference

T2DB098

Active: Yes > Sex: Male > Earliest Age: 41 > Oldest Age: 48 > Current Problems: Diabetes

Facility

All

Is Active

Yes

Classification

All

Sex

Female

Male

Patient Age

41

50

Patient Race

All

RESET ALL

Current Patient Problems

Current Problems search

☐ Cannabis abuse, uncomplicated

☐ Chest pain, unspecified

☐ Chronic Disease Clinic- Essential (primary) hypertension

☐ Chronic systolic (congestive) heart failure

☒ Diabetes

☐ Diverticulitis of small intestine w perforation and abscess

☐ Dizziness and giddiness

☐ Encntr for general adult medical exam w/o abnormal findi...

☐ Encntr screen for infections w sexl mode of transmiss

☐ Encounter for immunization

☐ Encounter for screening for depression

☐ Encounter for screening for diabetes mellitus

☐ Encounter for screening for human immunodeficiency vir...

☐ Encounter for screening for lipoid disorders

☐ Encounter for screening for oth suspected endocrine dis...

☐ Encounter for screening for other viral diseases

Patient Selection 7

Search

Patient ID	Sex	Age	DOB	Race
☐ 104582	Male	41	09/01/1984	B
☐ 109787	Male	44	02/08/1981	S
☐ 44652	Male	48	08/22/1977	B
☐ 47991	Male	46	06/01/1979	W
☐ 49184	Male	47	11/27/1977	W
☐ 67483	Male	43	12/29/1981	W
☐ 93048	Male	42	07/15/1983	W

Track active **Filters** by looking at the breadcrumbs section along the top of each page to see all currently applied selections.

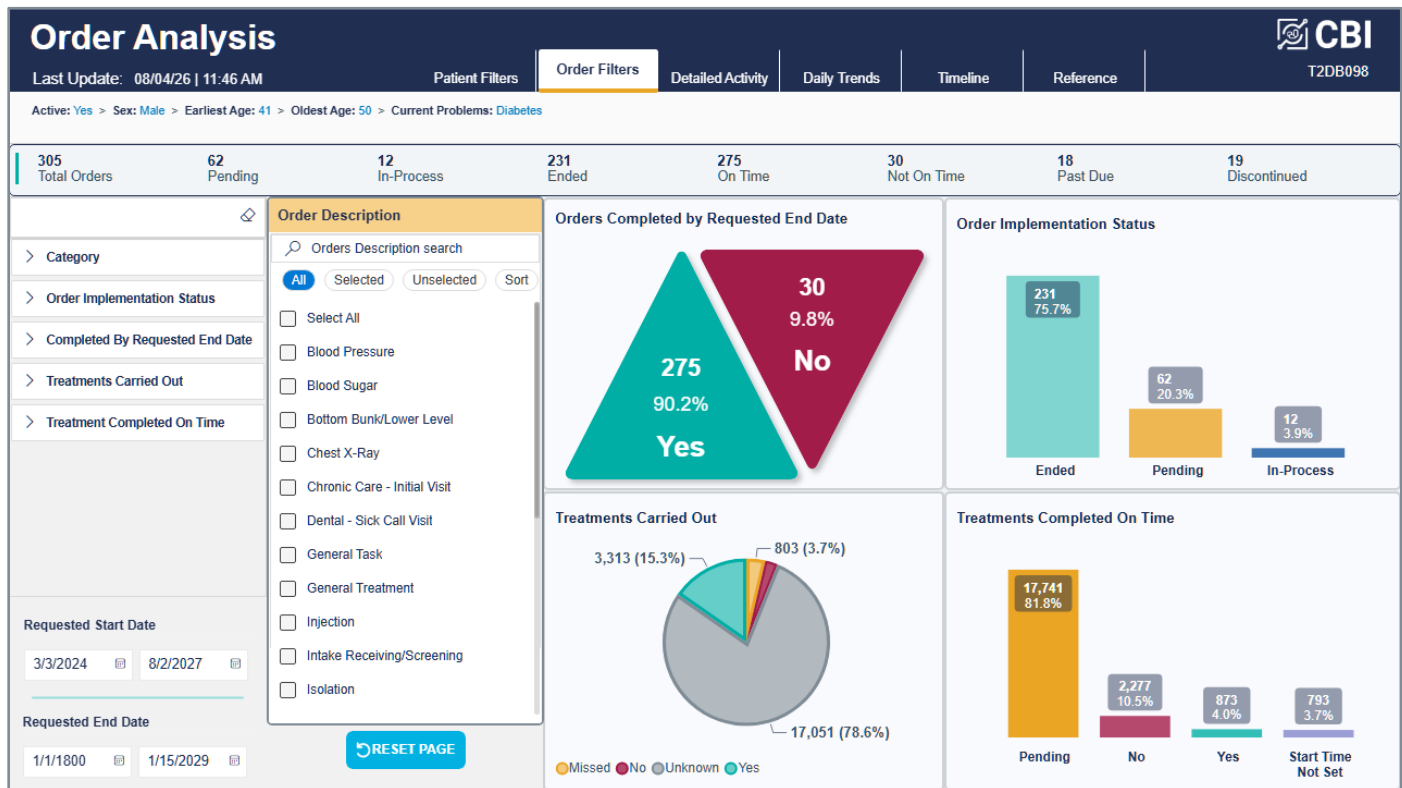
Any **Filters** selected on dedicated filter pages or via sliders/date ranges will remain in effect as you navigate to subsequent pages.

CBI Dashboard – Advanced (Tier 2)



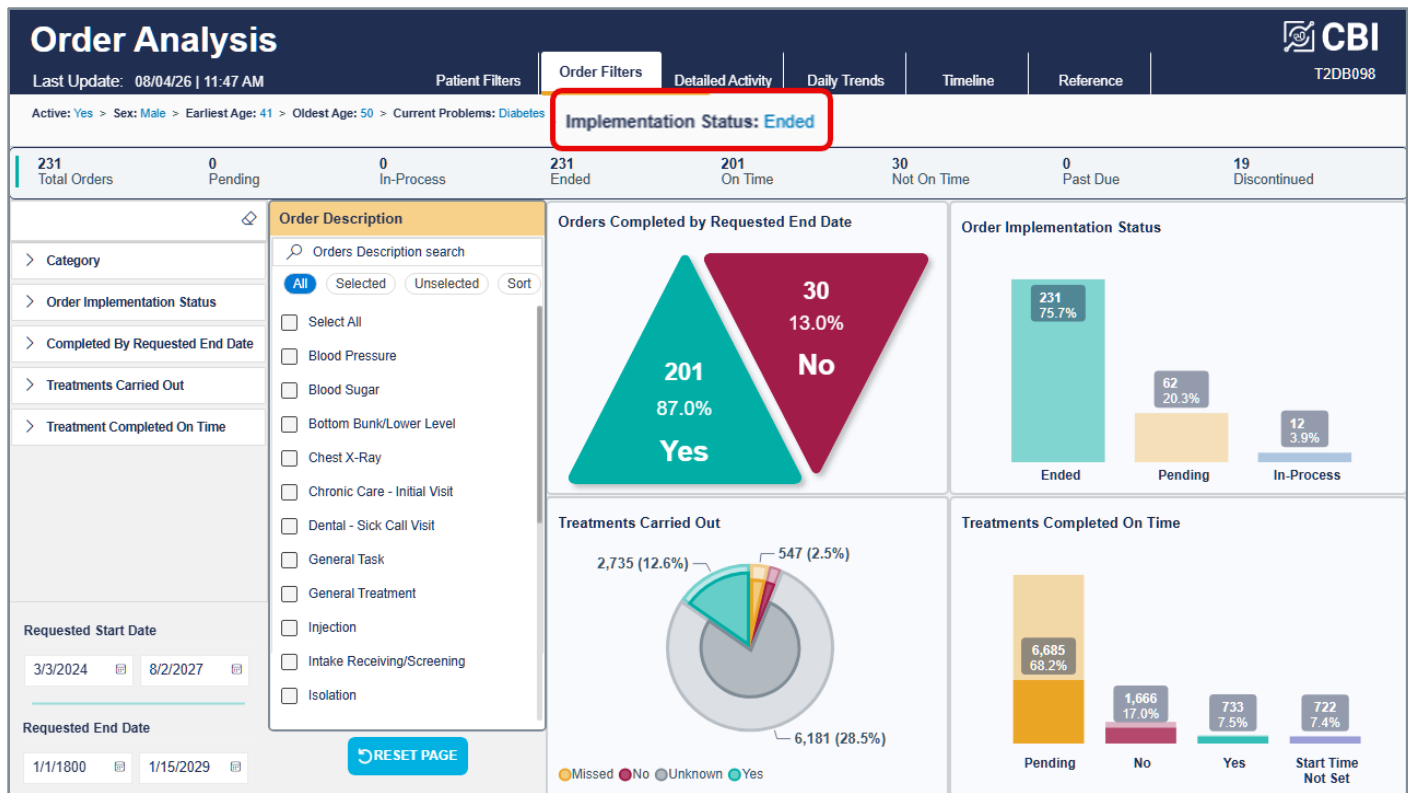
Visual Elements

Tiles and charts display counts and category distributions for the selected dashboard.



CBI Dashboard – Advanced (Tier 2)

Click directly on charts, graphs and other visual elements to filter or change the criteria on the page.



Unlike global filters, any direct clicks on visual elements will automatically reset once you leave the page.

| Tip: Changes made using slider bars or date ranges will stay in effect until manually adjusted or until the dashboard is closed and reopened.

CBI Dashboard – Advanced (Tier 2)



Various pages in the Advanced Dashboard allow you to drill down into Detailed Activity, Daily Trends or Timeline.

Order Analysis

Last Update: 08/04/26 | 08:29 AM

[Patient Filters](#)
[Order Filters](#)
[Detailed Activity](#)
[Daily Trends](#)
[Timeline](#)
[Reference](#)

Active: Yes > Earliest Age: 41 > Oldest Age: 49 > Current Problems: Diabetes

T2DB098

2,473
Total Treatments

1,947
Carried Out

78.7%
% Carried Out

526
Not Carried Out

21.3%
% Not Carried Out

0
Missed

0.0%
% Missed

1
On Time

2,472
Not On Time

Orders

Total: 273

Description	Patient ID	Treatment Count	Implementation Status	Provider Name	Instructions
Blood Pressure		1	Ended		Take and record patient's bl Goal blood pressure >100/7
Detox COWS Observation Checks (Opiates)		4	Ended		1. Observation checks q 4 h 2. THEN - Observation che PUSH FLUIDS
Vital Signs		5	Ended		Take and record patient's vit and temperature.
Blood Pressure		21	Ended		Take and record patient's bl Goal blood pressure >100/7

Selected Order

Patient ID

Order Description
Wound Care

Implementation Status
Pending

Requested Start Date
11/9/2026

Requested End Date
11/9/2026

Actual Start Date
10/24/2025

Actual End Date
10/24/2025

Instructions
Wound check to the left ear, cleanse and apply triple antibiotic ointment. If s/s of infection start to appear, notify provider.

Comments
Ended by subsequent order on: 9/16/2025 6:26:44 PM

Reason

Treatments

Total: 2,473

Description	Patient ID	Carried Out	Requested Date	Requested Shift	Documented Date	Documented In Window	Carried Out By
Blood Pressure		No	04/06/24	07-0600	04/06/24 08:56 AM	Start Time Not Set	
Blood Pressure		No	04/07/24	07-0600	04/07/24 08:09 AM	Start Time Not Set	
Blood Pressure		No	04/08/24	07-0600	04/08/24 08:43 AM	Start Time Not Set	
Blood Pressure		No	04/09/24	07-0600	04/09/24 08:10 AM	Start Time Not Set	
Blood Pressure		No	04/10/24	07-0600	04/10/24 09:15 AM	Start Time Not Set	
Detox COWS Observation Checks (Opiates)		No	10/06/24	12-1100	10/06/24 12:04 PM	Start Time Not Set	

CBI Dashboard – Advanced (Tier 2)

Reset Page

At any point, click the **Reset Page** button to restore your current view back to its default state.

| Tip: The reset action only applies to filters on the page you are currently viewing and will not alter selected filters on other pages.

Order Analysis

Last Update: 08/03/26 | 11:39 AM

Active: Yes

Facility
All

Is Active
No Yes

Classification
All

Sex
Female Male

Patient Age
17 73

Patient Race
All

RESET PAGE

Current Patient Problems

Current Problems search

All Selected Unselected Sort

- ☐ Select All
- ☐ Acquired absence of kidney
- ☐ Asthma
- ☐ Auto-Immune Disorder
- ☐ Blood
- ☐ Blood in Stool
- ☐ Cancer
- ☐ Cellulitis of left toe
- ☐ Chlamydial infection, unspecified
- ☐ Chronic Disease Clinic- Essential (primary) hypertension
- ☐ Chronic migraine without aura
- ☐ Dental caries, unspecified
- ☐ Diabetes
- ☐ Dizziness and giddiness
- ☐ Elevated blood-pressure reading, w/o diagnosis of htn
- ☐ Elevated white blood cell count

Patient Selection 845

Search

All Selected Unselected Sort

Patient ID	Sex	Age	DOB	Race
☐ Select All				
☐ 100038	Male	25	09/22/2000	W
☐ 100080	Female	24	10/01/2001	W
☐ 100309	Male	24	02/27/2002	B
☐ 100825	Male	27	05/06/1999	W
☐ 100857	Male	47	02/23/1979	W
☐ 100956	Male	29	08/07/1996	W
☐ 101031	Male	25	05/09/2001	W
☐ 101054	Male	24	11/30/2001	W
☐ 101348	Male	24	01/14/2002	W
☐ 101435	Male	25	02/27/2001	W
☐ 101568	Male	28	07/23/1998	W
☐ 101606	Female	30	03/23/1996	O
☐ 101636	Male	24	12/05/2001	W

CBI Dashboard – Advanced (Tier 2)



Reference Page

If you need clarification on what specific metrics or visual elements mean, visit the Reference Page for detailed definitions for each page on the dashboard.

Order Analysis

[Patient Filters](#)[Order Filters](#)[Detailed Activity](#)[Daily Trends](#)[Timeline](#)[Reference](#)

CBI
T2DB098

Overview

Patient Filters: Includes demographic and clinical filters to narrow the list of patients displayed for review.

Order Filters: Includes filters and summary views for analyzing order activity and status.

Detailed Activity: Displays order and treatment records with associated patient, provider, and status information.

Daily Trends: Displays trends in the number of active orders and treatments over time.

Timeline: Displays a timeline view of patient orders that have ended in the past 6 Months or are currently ongoing, showing status over time.

Reference: Provides explanations for the dashboard pages along with access to additional training resources.

Help & Training

[CorrecTek eLearning](#)