

Basic Training for the 2016 UDS BridgeIT Clinical Reports

By Ben Fouts MPH

December 20, 2016. Redwood Community Health Coalition

AGENDA

- Introduction and Available Materials
- Steps to Obtaining the Summary Data
 1. Get the right reports
 2. Run the reports the right way
 3. Clean and validate the data
 4. Summarize and compare

Introduction and Available Materials

Understand the nature of the data and acquire all support documents

Generation of Valid and Consistent UDS Data

- Assumption for this presentation: you understand the UDS measures and how to report them to the Bureau
- Don't just run the reports and enter the first set of literal results into the EHB
- There is a process of examining and validating the data before it is reported
- So, don't wait until the a week before it is due to start looking at your data

Working With Live Data

- 2016 data in eCW will be somewhat dynamic, even in January and February
- Start looking at your data now but don't gather the final results until later in January or early February.
- Try to run the reports for the “final” results on the same date or close to the same date.
- Also run them around the time that the “final” financial and demographic reports are run.
- The financial folks were told the same thing.

Main Manuals

- BPHC 2016 UDS Instructions

<http://bphc.hrsa.gov/datareporting/reporting/index.html>

- Validating and Reporting the 2016 UDS Clinical Measures (Version 2)

<http://www.rchc.net>

Validating and Reporting the 2016 UDS Clinical Measures (Version 2)



Serving Sonoma, Napa, Marin & Yolo Counties

The Main RCHC Manual

Describes what reports to run, how to run them, and how to validate the data

Preparation for Using the BridgeIT 2016 UDS Clinical Reports

RCHC DATA GROUP

DECEMBER 13, 2016

BY BEN FOUTS MPH

Recent Data Group Presentation

Download from the
RCHC IHIT Portal.
Contains additional
instructions and
recommendations.

Other Important Documents

- Report Index
- Technical Document
- Large Instruction Manual (December)
- Set-up Document (December)

Make Sure You Have the Right Versions of the Reports

Download from the BridgeIT Warehouse

The Report Index

- Lists the current report name and version number
- You may already have many of the reports
- Check especially the ones highlighted in orange

Most Recent Versions of Documents and Clinical Bridgelt Reports

Key Documents

Updated: November 2016

Instruction manual (expected):	Instructions_Bridgelt Clinical Annual Reports_v11 (December, 2016)
Technical document:	Technical_Bridgelt Clinical Annual Reports_v12 (November, 2016)
System Set-Up Document (expected):	SystemSetup_Bridgelt Clinical Annual Reports_v5 (December, 2016)
Validating the data:	Instructions_Validating_Cleaning_Data_v4 (April, 2016)

Bridgelt Reports

Color coding: **New version of report**

Report name in Bridgelt	Type	Version text (in About)	Last update
Adult_Weight_v7	Data summary		August 2016
Asthma_Pharma_v7	Data summary	Version 7.1	November 2016
Asthma_Validation_v3	Validation		October 2015
Breast Cancer Screen Validation_v3	Validation	Version 3.1	March 2015
Breast Cancer Screening_v6	Data summary	Version 6.1	October 2015
CAD_LipidLower_v4	Data summary	Version 4.2	November 2016
CAD_Validation_v4	Validation		November 2016
Cervical Cancer Screen Validation_v5	Validation	Version 5.1	March 2015
Cervical Cancer Screening_v8	Data summary		August 2016
Child_Weight_v6	Data summary	Version 6.1	November 2016
ColRect Cancer Screening_v6	Data summary		August 2016
ColRect_Image_Validation_v3	Validation	Version 3.1	March 2015
ColRect_LabTest_Validation_v2	Validation	Version 2.2	March 2015

⚠ Pending Alerts

Workgroup BridgeIT for eClinicalWorks

User

Toolbox

File

Size 167 MB

Version 9.7.6 Revision 06 Build 19

Platform Microsoft® Office 2010

[Open Information Center](#)

Project Note

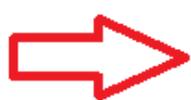
Can be used to validate data and report on patients with persistent asthma who were prescribed pharmacologic therapy. Version 7: modified age range and added exclusion column. Version 7.1: mods subquery optimized

Workbook

- Annual Clinical Report Set New
 - Adult_Weight_v7
 - Asthma_Pharma_v7**
 - Reports
 - Excel
 - Alerts
 - Data Sources
 - Data Sets
 - Asthma_Validation_v7
 - Breast Cancer Screening_v7
 - Breast Cancer Screening_v7
 - CAD_LipidLower_v4
 - CAD_Validation_v4
 - Cervical Cancer Screening_v4
 - Cervical Cancer Screening_v4
 - Child_Weight_v6
 - ColRect Cancer Screening_v6
 - ColRect_Image_Validation_v3
 - ColRect_LabTest_Validation_v2
 - Dental_Sealants_v1

Context menu for Asthma_Pharma_v7:

- View Results
- Delete Results
- Create New Results
- Append New Results
- View Criteria
- Project Wizard
- Edit Project
- Copy Project
- Delete Project
- Send to Warehouse
- Export Results to Text File
- About**



Asthma_Pharma_v7

Close **Project Information** Source Project Information Help

Type: Workbook
 Category: Annual Clinical Report Set New
 Name: Asthma_Pharma_A_0118
 Version: 0.0.0
 Last Modified: 12/19/2016 9:08:53 AM
 Shared: Yes
 Last Ran: None
 Run Time: None hh:mm:ss
 SQL Pass Thru: No [View SQL Pass Thru Error](#)

Note: Can be used to validate data and report on patients with persistent asthma who were prescribed pharmacologic therapy. Version 7: modified age range and added exclusion column. Version 7.1: mods subquery optimized

Compare the Version Numbers

Report name in Bridgelt	Type	Version text (in About)	Last update
Asthma_Pharma_v7	Data summary	Version 7.1	November 2016

 Asthma_Pharma_v7 **Project Note**

Can be used to validate data and report on patients with persistent asthma who were prescribed pharmacologic therapy. Version 7: modified age range, and added exclusion column. Version 7.1: needs subquery optimized

Right-Click to Import

Bridgell SOLUTIONS
Leading the way in data management
Since 1995

Pending Alerts

Workgroup: Bridgell for eClinicalWorks
User:
Toolbox:
File:
Size: 167 MB
Version: 9.7.6 Revision 06 Build 19
Platform: Microsoft® Office 2010

Workbook

Task Manager (Scheduled Tasks are Disabled)

Warehouses

- My Computer
- Workgroup
 - Redwood Clinical Reports
 - Workbook
 - Annual Clinical Report Set New
 - Adult_Weight_v7
 - Asthma_Pharma_v7**
 - Asthma_Validation_
 - Breast Cancer Scre
 - Breast Cancer Scre
 - CAD_LipidLower_v
 - CAD_Validation_v4

Context menu options:
Import
View Results
Delete
About

A red arrow points to the 'Import' option in the context menu.

Use the BridgeIT UDS Instructions to Run the Reports

You need to apply the right filters and copy the results from the right output

Normal BridgeIT Report Running Sequence

1. Right-click report and choose “Create New Results”
2. Enter measurement period into Parameters (e.g., 1/1/2016 to 12/31/2016)
3. Apply filters to the Data Sheet
4. Open the Output for viewing
5. Refresh the data in the Output
6. Go to the right Output sheet

Example #1: Asthma Pharmacologic Therapy

Asthma Pharmacologic Therapy

Report name: Asthma_Pharma_v7

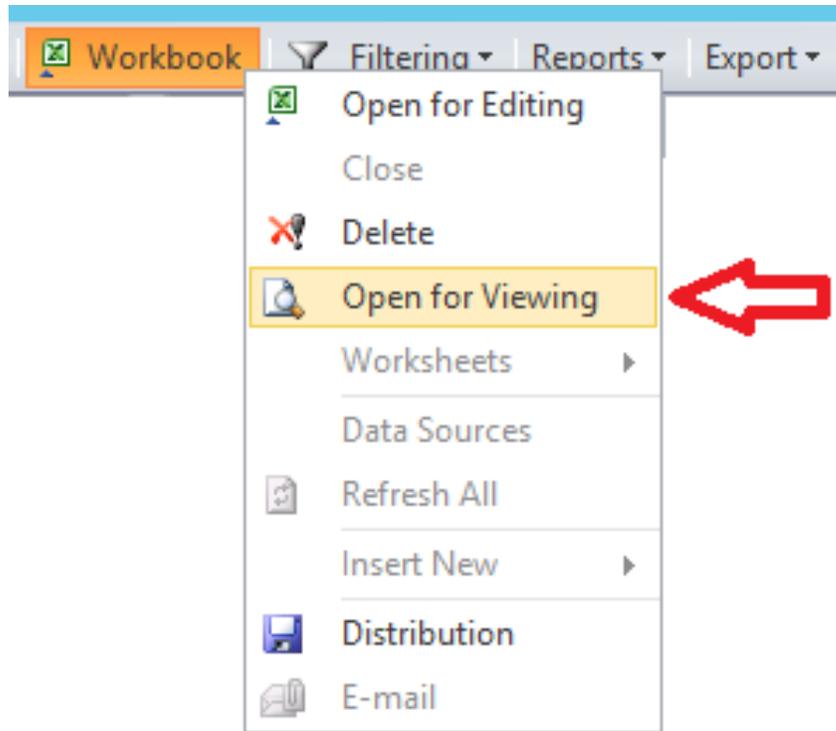
Parameters and filters: Upon running the report, enter the measurement period (i.e., 1/1/2016 to 12/31/2016). When viewing the datasheet, filter for patients with one or more primary care visits during the measurement period (PrimCareVisitsPeriod >0), persistent asthma (HasPersistentAsthma = "Yes") and no exclusion criteria (Exclude_UDS does not equal "Exclude"). Age criteria (patient age between 5 and 64) is automatically applied.

Result summary: The datasheet "AsthmaMeds" in the Excel output displays results that can be used for the UDS report Table 6B, Section H. The Grand Total on this worksheet is the denominator (Columns a and b in the UDS table for this measure) and the value in the row "Yes" (for AsthmaMedWithin1Y) is the numerator (Column c, "NUMBER OF PATIENTS WITH ACCEPTABLE PLAN").

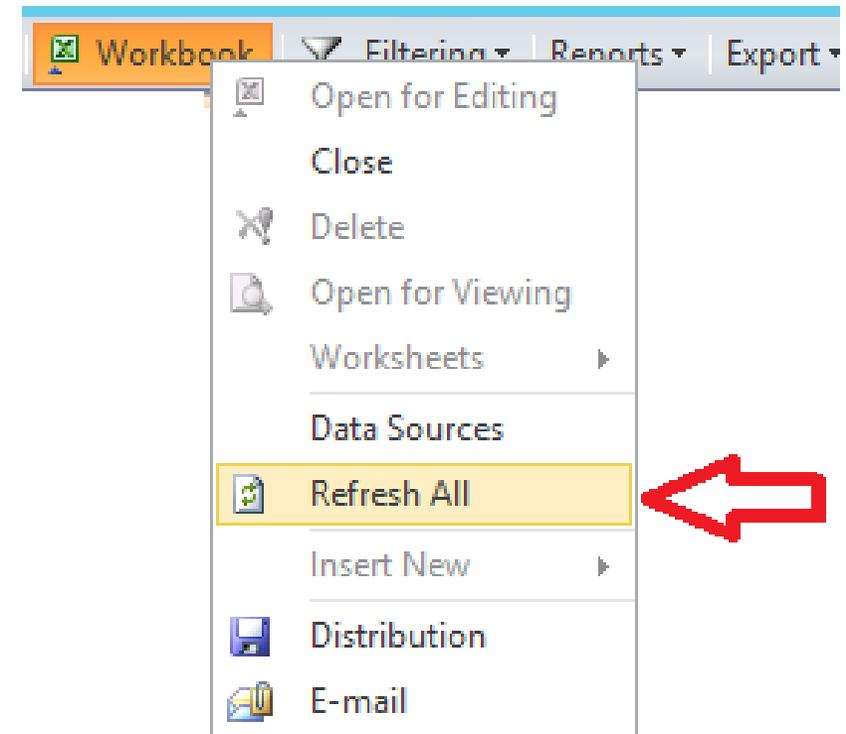
Example #1: Asthma Pharmacologic Therapy

Measure	Report Name	Filters on data sheet	Output sheet
Asthma Pharmacologic Therapy	Asthma_Pharma_v7	<ul style="list-style-type: none">• PrimCareVisitsPeriod >0• HasPersistentAsthma = "Yes"• Exclude_UDS does <u>not</u> equal "Exclude"	AsthmaMeds

Open and Refresh the Data



THEN...



Example #2: Colorectal Cancer Screening

Measure	Report Name	Filters on data sheet	Output sheet
Colorectal Cancer Screening	ColRect Cancer Screening_v6	<ul style="list-style-type: none">• PrimCareVisitsPeriod >0• Exclude_Colect_ColCancer <u>not</u> equal to "Exclude"	Colorectal Cancer Screen Summ

Example #3: Depression Screening and Follow-up

Measure	Report Name	Filters on data sheet	Output sheet
Depression Screening and Follow-up	Depression_Screen_Followup_v6	StartMP_Dx_ProbList_Exclude <u>not</u> equal to "Exclude"	Outcome_Summ

Clean and Validate the Data

Some measures have separate validation reports

NOTE on Updating Records on eCW

- Follow your clinic policy
- Who has authority to change the record?
- Can the record be changed? (eg, prenatal)
- Who has the responsibility to change the record? (And who has the time?)

Separate Validation Reports

- Find labs that need to be completed
- Find images that need to be completed
- Find patients who may be missing a key diagnosis code on their Problem List

- Descriptions of these reports appear in the large Instructions document

Labs and Images

- Cervical cancer screening labs (i.e., paps)
- Colorectal cancer screening labs (i.e., FIT and FOBT)
- Colorectal cancer screening images (i.e., colonoscopy and sigmoidoscopy)
- Hemoglobin A1c labs and LDL labs (on same report)

Example: Colorectal Cancer Screening

Data validation: There are two separate data validation reports available for this measure:

1. Colorectal Cancer FOBT Lab Test Validation (ColRect_LabTest_Validation_v2). This report displays all FOBT and FIT tests (associated with LOINC codes) ordered within a period of time that do not have results entered properly into the eCW structured data fields.

Example: FIT and FOBT Labs

- ColRect_LabTest_Validation_v2
- Displays all labs ordered
- Filter column MeetsMUCriteria = “No”
- Note on “MU Criteria (Technical Document page 8)

According to eCW, the following criteria are used to recognize that a lab is properly entered into structured data:

1. The result date has been entered into the Lab Results window
2. The Received box has been checked on the Lab Results window
3. At least one value has been entered in the yellow row on the Lab Results window

Example: Colonoscopy and sigmoidoscopy images

- ColRect_Image_Validation_v3
- Displays all images ordered
- Filter column MeetsReportingCriteria = “No”
- Reporting criteria are a Result and an image date (a collected date, preferred, or a result date)

Problem List Validation Reports

- For all measures where a diagnosis is used to help define the denominator
- Diabetes, Hypertension, Asthma, CAD, IVD, Depression, and HIV
- Can be filtered for patients WITHOUT a diagnosis on the Problem List but WITH a diagnosis on an assessment or claim in the past
- These patients are only candidates for a diagnosis. To add a code to the Problem List requires a clinical decision by a provider

Example: Patients with Diabetes

- DM_Validation_v3
- Filter ActivePt = “Active” and PrimCare_visits_ever > 0 (or Last_PrimCareAppt in the past 12 or 18 months)
- Patients without a DM diagnosis code on their Problem List: filter DM_Any_Diag_ProbList for not “Yes”
- The Rendering Provider can check the patients displayed

Other Validation Steps (Without Separate Reports)

- Patients possibly with persistent asthma
- Prenatal patients missing delivery information
- Medications in medication groups
- Specialty of primary care providers

Patients Possibly With Persistent Asthma

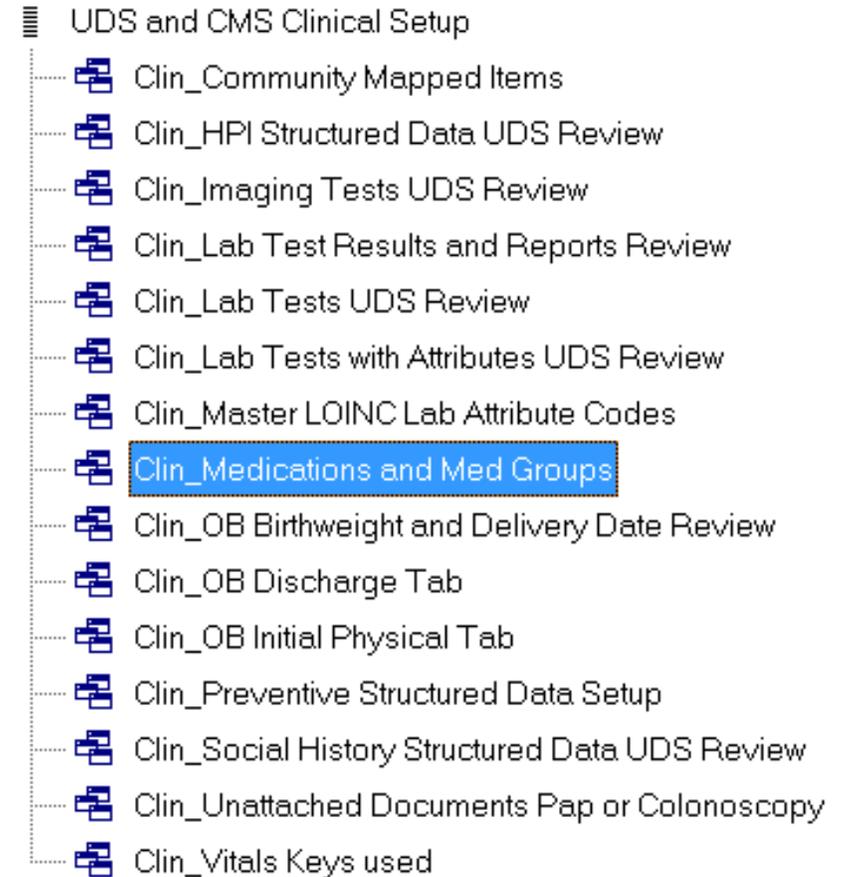
- Find patients WITHOUT identified persistent asthma BUT USING an asthma control medication
- PrimCareVisitsPeriod > 0, ActivePt = “Active” and Exclude_UDS not equal to “Exclude”
- HasPersistentAsthma = “No” and AsthmaMedWithin1Y = “Yes”
- The Rendering Provider can check the patients displayed

Prenatal Patients Missing Delivery Information

- UDS_Deliveries_v4
- Filter the column Final_EDD_date column for any date
- Filter the column DeliveryDate for no date
- Check the OtherOutcome column for reasons why the patient might not have delivery information. Filter out patients with a valid reason

Medications in Medication Groups

- Clin_Medications and Med Groups is in this folder of the Warehouse, but may also be in your toolbox in the folder UDS Setup and Data Review
- Use filter and sort functions to explore the (long) list
- All instances should be mapped
- Reports with meds; asthma, CAD, IVD, tobacco, depression



Specialty of Primary Care Providers

- This is a responsibility of those who are doing the UDS demographic and financial sections BUT it greatly effects the clinical reports
- Only visits by Primary Care Medical Providers are counted by the clinical reports
- Report is “Table 5 Provider and Resource Mapping”
- The “Specialty” field is on the provider’s record in eCW
- See page 6 and 7 of the Technical Document

Summarize the Data and Compare to Other Sources

The results should be realistic and accurate

Gather and Use Comparison Data

- Compare to the 2015 UDS (the UDS editor will!)
- Compare to your monthly or quarterly Dashboard (or other monitoring histories)
- For similar measures, compare to submitted PIP, ACO or QIP reports
- Note that patient populations and/or definitions may be different

Compare Results to Other Sources

- The new results should be “in the ballpark” with other sources of information, unless there is a clear reason for change (i.e., performance improvement activities, etc.)
- Differences with 2015 should be explained logically by differences in definition, changes to clinical quality or data entry quality, etc.
- There will always be some level of variability in the data. If the difference is a concern, review some records in eCW
- Use the Technical Document to understand how data is being pulled

Questions?

- Blocks of time available Wednesday and Thursday this week
- Also available for questions in January