



Using Bridgelt to Report the UDS Financial Measures

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AGENDA

- Introduction and Available Materials
- Steps to Obtaining the Data
 1. Set-up
 - Mapping
 2. Clean-up
 - Alerts
 3. Sum-up
 - Outputs of reports



Introduction and Available Materials

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

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 at the same date or close to the same date.
- Also run them around the time that the "final" clinical reports are run.
- I will tell the clinical folks the same thing.

Main Manuals

- BPHC 2016 UDS Instructions

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

- Draft Heckman Consulting instructions for running the BridgeIt demographic and financial reports

Schedule an “Upgrade”

- May have already been done (??), so check with your IT folks
- You need new versions of the reports (in the Warehouse)

Import the 2016 Reports

Three methods:

1. Visit the BridgeIT Information Center (button at the top of the window) to see the reports with new versions that are not in your Toolbox
2. Left-click on a report in BridgeIt, you will get a message if there is a new version
3. Import entire folders

Information Center

The screenshot displays the 'BridgelT® Solutions Toolbox' application window. The menu bar includes 'Exit Toolbox', 'Workgroup Options', 'Toolbox Options', 'Information Center', and 'Help'. The 'Information Center' menu item is circled in red, with a red arrow pointing to it and the word 'Click' written in red below the arrow. Below the menu bar, the 'Main Form' contains the BridgelT logo and the text 'Leading the way in data management Since 1995'. Underneath, there is a 'Pending Alerts' section with fields for 'Workgroup', 'User', and 'Toolbox', and a 'File' section with fields for 'Size', 'Version', 'Revision', 'Build', and 'Platform'. At the bottom of the main form, the 'Open Information Center' button is highlighted in yellow and circled in red, with a red arrow pointing to it and the word 'Click' written in red below the arrow. To the right of the main form, a 'BridgelT Information Center' dialog box is shown, which has a 'Close' button and a 'NOTE: Flashing indicates new information.' Below the note, there is a 'Release Notes' section with three items: 'Toolbox', 'Project Library', and 'Data Definition', each with a yellow square icon.

BridgelT® Solutions Toolbox

Exit Toolbox | Workgroup Options | Toolbox Options | Information Center | Help

Main Form

Click

 **BridgelT**[®]
SOLUTIONS
Leading the way in data management
Since 1995

Pending Alerts

Workgroup BridgelT for eClinicalWorks

User

Toolbox

File

Size 161 MB

Version 9.7.6 Revision 06 Build 19

Platform Microsoft® Office 2010

Click

Open Information Center

BridgelT Information Center

Close NOTE: Flashing indicates new information.

Release Notes

- Toolbox
- Project Library
- Data Definition

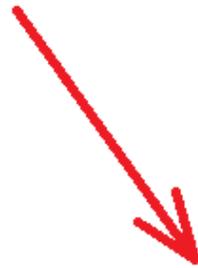
Information Center

BridgelT Information Center

NOTE: Flashing indicates new information.

Release Notes

- Toolbox **Click**
- Project Library
- Data Definition



Click

Project Library Review

			Project Description	Date Modified	Library Version	Toolbox Version			
Master Library	Workbook	System Setup	Master LOINC Codes	12/8/2016 4:48:00 PM	5.3.9		<input checked="" type="checkbox"/>		
Master Library	Workbook	Appointments and Visits	Appointment Analysis with Cycle Time	12/7/2016 9:33:40 AM	5.4.3	0.0.0	<input checked="" type="checkbox"/>		

Importing New Version Manually

Project: UDS Table 1 Zip Codes

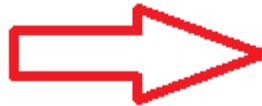
A new version of this project has been identified in the Project Library. Depending on the most recent documentation you may want to replace it with this latest version.

NOTE: If you have made any changes to the project you will need to reproduce those changes.

Current Version: 5.3.3

New Version: 5.3.4

Click



Warehouses

- My Computer
- Workgroup
- Library
 - Clinical Repository
 - Master Library
 - Workbook
 - UDS Financial
 - UDS Claims and Encounters
 - UDS Encounter Review
 - UDS Table 1 Zip Codes** (context menu open)
 - Import
 - View Results
 - Delete
 - About
 - UDS Table 3A and B P
 - UDS Table 3B SOGI fr
 - UDS Table 3B SOGI fr
 - UDS Table 4 Selected
 - UDS Table 5 Staffing and Utilization

Importing New Version Manually

Click

Importing: UDS Table 1 Zip Codes

Cancel **Ok** Help

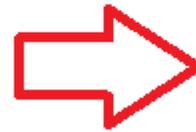
Project Description
UDS Table 1 Zip Codes

Place In **Categories**
 Workbook Task Manager UDS Financial

Available Objects/Settings

Prompted criteria Hidden column settings
 Filters Reports
 Excel workbook

Result Set
 None Import Link



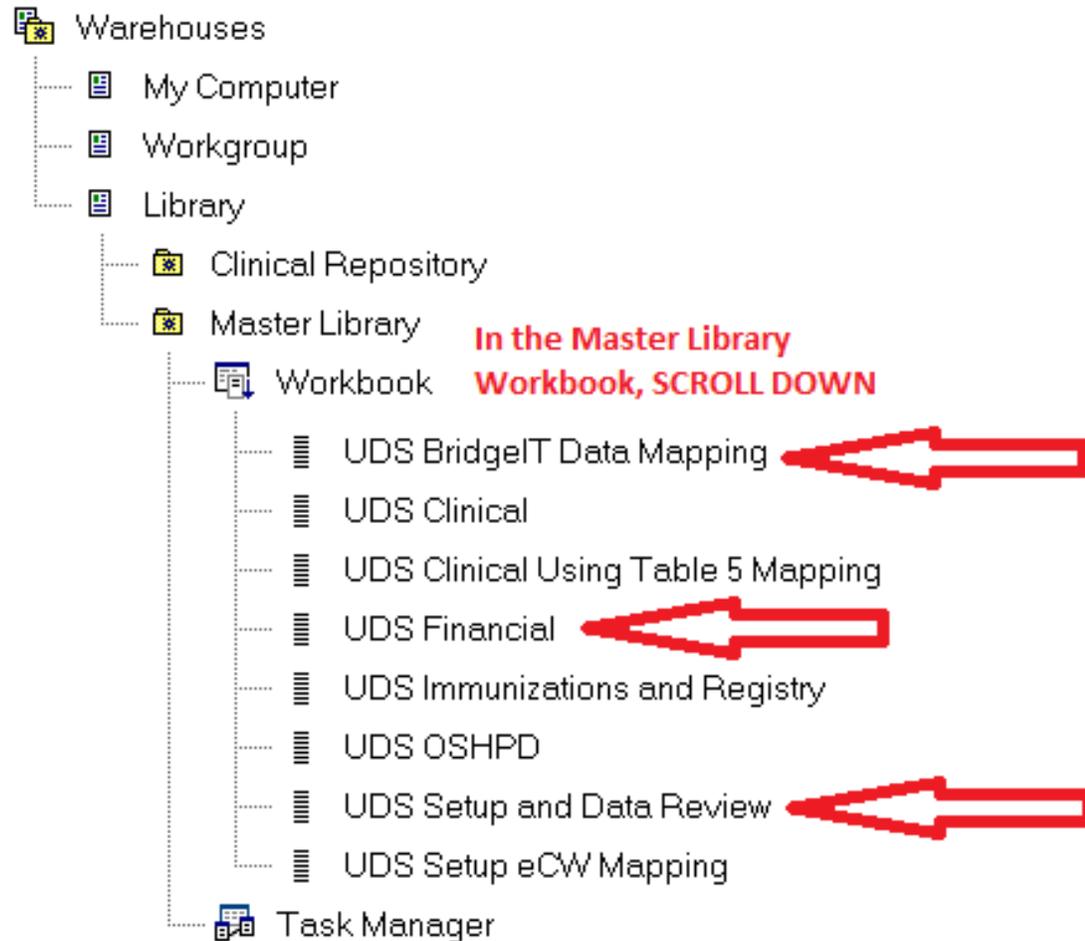
BridgIT® Solutions

The Project Description 'UDS Table 1 Zip Codes' is already used for project(s) in the following locations.
Workbook Category: UDS Financial

Do you want to delete the old project(s) and import this new project?

Click **Yes** **No**

Importing Entire Folders





Steps to Obtaining the Data

Steps to Demographic and Financial Reporting

1. Set-up (mapping providers, insurance and adjustments)
2. Clean-up (investigating and fixing records that have missing or mistaken information)
3. Sum-up (running the actual summary reports)

Step 1. Set-up

- The major set-up is the mapping
- You have to map in a separate database
- The advantage is you can immediately run your reports after changing the mapping
- The disadvantage is you have to find the database (and potential reports problems). See page 6 of the instructions for the location.
- There might be mapping in the database from last year

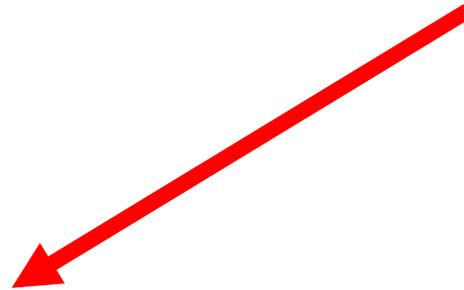
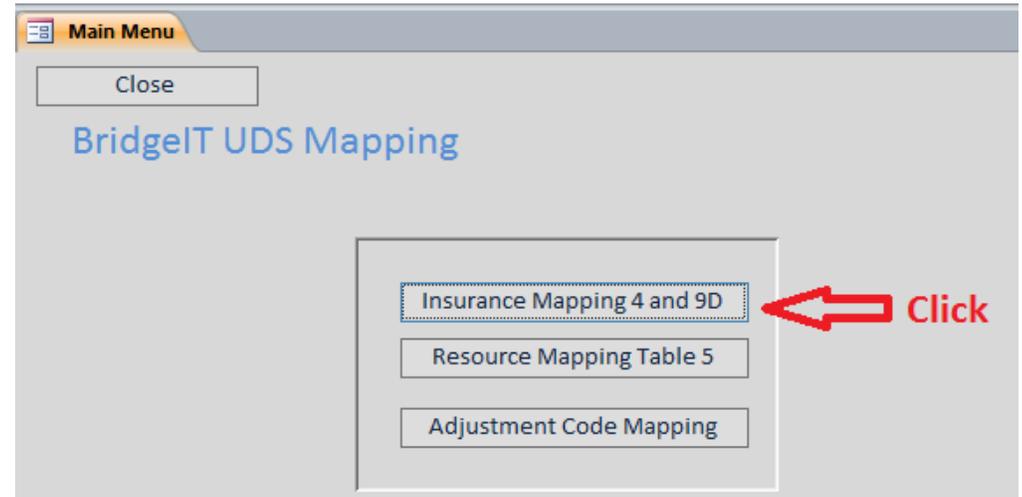
The Mapping Database

- Three different tables to complete.
- One person should do the mapping.
- Run the reports in the UDS BridgeIT Data Mapping Folder first
- Copy the results to Excel, figure out how the unmapped items should be mapped and check the accuracy of the mapped items from last year. Document your mapping also in the Excel file so you can reference it when not logged into BridgeIt.

Mapping Insurance

- See page 6 of the instructions for the section Map and Review Table 4 and 9D Insurance Mapping.
- This report (“Table 4 and 9D Insurance Mapping”) will show current mapping and unmapped insurance plans.
- If you haven’t used the insurance in 2016, don’t map it
- The mapping is a little different for each table:
 - TABLE 4: unmapped insurance defaults to PRIVATE INSURANCE.
 - TABLE 9: no unmapped insurance
- Patients without insurance are mapped for both tables

Example: Using the Mapping Database for Insurance



Close UDS Insurance Mapping Blank entries for Table 4 will default to Commerical. There are no defaults for Table 9.

Ins. ID	Insurance Name	Table 4 Line	Medical Insurance	Table 9 Line	Payor Category
1721	Bakers Health and Welfare	▼	▼	10 ▼	Private Non-Managed Care ▼
1660	Bankers Life & Casualty Comp	▼	▼	10 ▼	Private Non-Managed Care ▼
1754	Bay Area Painter&Taper HF	▼	▼	10 ▼	Private Non-Managed Care ▼
1779	Bay Area Roofers Health Fund	▼	▼	10 ▼	Private Non-Managed Care ▼
1800	BC Healthy Families OAHC	8b ▼	CHIP Medicaid ▼	7 ▼	Other Public including Non-Medicaid CHIP (Non Managed Care) ▼
1798	BC Healthy Families RRHC	8b ▼	CHIP Medicaid ▼	7 ▼	Other Public including Non-Medicaid CHIP (Non Managed Care) ▼

Right-click on columns to sort

Mapping Providers

- See page 9 of the instructions for the section Map and Review Table 5 Provider and Resource Mapping.
- This report (“Table 5 Provider and Resource Mapping”) will show current mapping and unmapped resource providers.
- NOT ALL resource providers should be mapped.
 - See page 10 of the BridgIt instructions for lines that should NOT be mapped.
 - See page 22 of the UDS instructions for a definition of a provider.
 - Appendix A of the UDS instructions also has a list of staff who are consider providers or not. See also the section beginning on page 52.

Example: Using the Mapping Database for Providers

Also make sure there is a **specialty** listed for each provider in their eCW record

First Name		Table 5	Personnel Category
Lorraine	LCSW	20a2	Licensed Clinical Social Workers
Rebekah	RN	11	Nurses
Matthew	MD		
		1	Family Physicians
		2	General Practitioners
		3	Internists
		4	Obstetrician/Gynecologists
		5	Pediatricians
		7	Other Specialty Physicians
		9a	Nurse Practitioners
		9b	Physician Assistants
		10	Certified Nurse Midwives
		11	Nurses
		16	Dentists
		17	Dental Hygienists
		20a	Psychiatrists
		20c	Other Mental Health Staff
		20b	Other Licensed Mental Health Providers
Michelle	LCSW	20a2	Licensed Clinical Social Workers

Mapping Two Adjustment Codes

- See page 11 of the instructions for the section Map and Review 9D Bad Debt and Sliding Fee Code Mapping
- Report is “Table 9D Financial Adjs Posted in UDS Year”
- ONLY Bad Debt and Sliding Fee Codes should be mapped for Table 9D

Example: Using the Mapping Database for Adjustment Codes

Main Menu Adjustment Mapping

Close UDS Table 9 Adjustment Mapping

Adj Code	Adj Name	gD Line	Table gD Category
SC	Sliding Scale	14	Sliding Fee Adjustment Codes (Line 13, Column E)
UC	Uncompensated Care	15	Personal Bad Debt Adjustment Codes (Line 13, Column E)

14 Sliding Fee Adjustment Codes (Line 13, Column E)
15 Personal Bad Debt Adjustment Codes (Line 13, Column E)

Other Set-Up Procedures

- Review Default Race Codes (see page 12 of the BridgeIT instructions)
- Report: 1_Races codes in eCW Drop Down list
- In UDS Setup and Data Review category
- Not part of the Mapping Database

- Test Patients: see Appendix C of the BridgeIT instructions (pg 103)

- Once you have made changes, run the set-up reports again to check if there are still alerts that need to be handled

Step 2. Clean-up

- Identify records with missing or faulty information.
- Investigate these records and change them (if possible) or document how to adjust the final results.
- These reports have built-in alerts that will display records that need to be examined.
- Be aware of your work-flow and normal practice. Some of the alerts show records to consider, and you might conclude they are okay.

Review UDS Demographics

- See page 13 of the BridgeIT instructions
- Report: 1_Patient Age Race Ethnicity Review

Alerts

- Age Range Check
- Deleted Patients Exist
- Race and or Ethnicity Missing
- Race Mismatch
- Sliding Scale Review
- Zip Codes Missing or Invalid

Note on Race and Ethnicity

- You should make sure that the race drop-down list is composed on “standard” categories
- You should “clean” the data in eCW for individual patients so that you do not have to manually re-calculate the summary table. Race and ethnicity is also used on Table 7.

Note on Sliding Scale

- If the sliding scale form is not completed (i.e., it is blank), then the PovertyLevel column on the report “UDS Table 4 Selected Patient Characteristics” will display “-1” and the PovertyLevelGroup column will display “Unknown.”

Note on Zip Codes

- The report will take the first 5 digits of the zip code, so ZIP + 5 is okay
- Check for non-standard zip codes by sorting the Zipcode column and looking at the top records and bottom records

Review Encounters that May not be Completed

- See page 16 of the BridgeIT instructions
- Report: 1_Encounters Without Claims UDS Review

Alerts

- Encounters with Vitals and Assessments
- Note: depending on when you run the report, some encounters might be very recent and not yet processed

Review Claim Creation and Charge Entry

- See page 15 of the BridgeIT instructions
- Report: 1_Claims without CPT Codes or Charges

Alerts

- Claim with Applied Pmts or Adjs and zero charges
- Claims without CPT Codes

- Note: sometimes, these are by design

Table 9D: Other Charges to Review

- See page 96 of the BridgeIT instructions
- Report: UDS Table 9D Other Charges
- Relevant to Table 9D, so you may want to run it when you are also examining the data on that table. This data is for your review purposes and is not for a line in the table.
- Find any charge revenue that may have been billed as a “Claim without an Encounter” and should be reported on 9D as a charge, for example split claims.

Table 9D: Other Adjustments to Review

- See page 99 of the BridgeIT instructions
- Report: UDS Table 9D Other Adjs

- Again, run at the same time as reviewing data for Table 9D.
- Find financial adjustments that were not mapped as a sliding scale or bad debt.

Double-Check the Clean-up

- Some of the reports that summarize the data also have alerts built into them
- After the initial clean-up, run the summary reports and review those alerts as well

General Appointment Browsing

- UDS Med Visits Appointment Review (in the UDS Setup and Data Review folder)
- If you want to see a big list of appointments (one appointment per row), use this report. Don't use the reports UDS Encounter Review or UDS Claims and Encounters for this purpose.
- Once you get more comfortable with BridgeIT, you can use the filters on this report to find visits that might need further investigation
- For example, visits without a claim that possibly should have a claim

Step 3. Sum-up

- Run the reports and compare 'cleaned' but still preliminary results to other sources of data (eg, monthly or cumulative reports)
- The UDS Reviewer will compare the data in the demographic and financial sections to the clinical sections of the report and to your results from 2015. Therefore, you should do the same.
- Investigate any large differences. If the difference is true, enter an explanation into the table notes (optional) or at least prepare to eventually explain it to the reviewer.
- Check reviewer's comments from last year. Do they still apply?

First Reports to Run

UDS Financial	
UDS Claims and Encounters	Run first
UDS Encounter Review	Run second
UDS Table 1 Zip Codes	
UDS Table 3A and B Pats by Age Race Ethnicity	
UDS Table 4 Selected Patient Characteristics	
UDS Table 5 Staffing and Utilization	
UDS Table 5 Visits to Back Out	
UDS Table 6 A Selected Diags and Services	
UDS Table 9D Charges	
UDS Table 9D Other Adjs	
UDS Table 9D Other Charges	
UDS Table 9D Payments and Contractual Adjs	
UDS Table 9D Sliding Scale and Bad Debt Adjs	

- UDS Claims and Encounters shows everything
- UDS Encounter Review narrows them down to UDS-reportable visits, according to the rules: mapped provider, claim, or CHK

Zip Code Report

- Standard procedure: run the report, open the output and click refresh
- Suggestion: copy the output table into Excel. Scroll down until you reach zip codes with 10 or fewer in the Grand Total column. The total patients in these rows for each column will need to be summarized to the “Other ZIP Codes” row of the UDS Table.
- There is also an output table for city. This is for your information only.

Table 3B, Line 12

Patients best Served in a Language Other Than English

- Output table shows language in rows (text field) and interpreter needed in the columns
- Generally, we count those patients who need an interpreter as best served in another language. But it is a good idea to check the languages
- For example, in the presentation, we saw English patients who needed an interpreter

New Item on Table 3B: Gender Identity

Line	Patients by Gender Identity	Number (a)
20.	Male	
21.	Female	
22.	Transgender Male/ Female-to-Male	
23.	Transgender Female/ Male-to-Female	
24.	Other	
25.	Chose not to disclose	
26.	Total Patients (Sum Lines 20 to 25)	

Social History

Structured Patient Demographics

Gender Identity Answers:

Male
 Female
 Transgender Male/Female-to-Male
 Transgender Female/Male-to-Female
 Other
 Choose not to disclose

New Item on Table 3B: Sexual Orientation

Line	Patients by Sexual Orientation	Number (a)
13.	Lesbian or Gay	
14.	Straight (not lesbian or gay)	
15.	Bisexual	
16.	Something else	
17.	Don't know	
18.	Chose not to disclose	
19.	Total Patients (Sum Lines 13 to 18)	

Social History

Structured Patient Demographics

Structured Data

SO/GI Data: + Add + Add child Update - Remove Reorder

Name	Type	Mandat	Trigger	Default
Sexual Orientation:	Structured Text	<input type="checkbox"/>		
Gender Identity:	Structured Text	<input type="checkbox"/>		
Date Taken/Updated:				

Structured text

Sexual Orientation: + Add - Remove

Name	Default
Lesbian or Gay	<input type="checkbox"/>
Straight (Not Lesbian or Gay)	<input type="checkbox"/>
Bisexual	<input type="checkbox"/>
Something Else	<input type="checkbox"/>
Don't Know	<input type="checkbox"/>
Choose Not to Disclose	<input type="checkbox"/>

<input type="checkbox"/>	Sexual Orientation
<input type="checkbox"/>	Gender Identity

Sexual Orientation Answers:

Lesbian or Gay
 Straight (not lesbian or gay)
 Bisexual
 Something else
 Don't know
 Choose not to disclose

Reports for Table 3B: Gender Identity and Sexual Orientation (New)

- Report name: UDS Table 3B SOGI from Social History
- Report name: UDS Table 3B SOGI from Patient Demographics
- One output for gender identity and one for sexual orientation

Table 4: Patient Characteristics

Report: UDS Table 4 Selected Patient Characteristics (page 86)

Output sheets for:

- Poverty category
- Medical Insurance
- Migrant/Seasonal Worker
- Homeless
- Veterans
- Public Housing

Table 5: Staffing and Utilization

- Report: UDS Table 5 Staffing and Utilization (page 90)
- Output shows the visit count for each row of Table 5 (column b) and the unduplicated patient count for the staff categories (column c)
- FTE (column a) and also tenure (Table 5A) does not come from eCW/BridgeIT

Table 5 and Visits to Back Out

- UDS Rule: Only one visit per Major Service Category per day
- So, if a patient had two visits in one day to providers in the same category, you will need to assign the visit to one of the providers
- Use the report UDS Table 5 Visits to Back Out and see page 91 of the instructions
- Look at what the common types of pair are, for example Nurse-Family Physician, or Dentist-Dental Hygienist
- You can split them, you can assign them to one or the other, you can make some kind of ratio, etc.

Table 6A

- Run the report UDS Table 6 A Selected Diags and Services (see instructions on page 93)
- Note that where there are lines with visits/patients in BOTH the diagnosis and CPT columns, choose to report one or the other. Do NOT add them together because you will duplicate.

Table 6B, 7 and 8

- Clinical tables: 6B and 7. Training webinar on how to use the BridgeIT reports for these is next Tuesday
- Use the RCHC reports and instructions, not the Heckman reports and instructions
- Table 8: Financial Costs. This information does not come from eCW/BridgeIT

Table 9D: Charges (Column a)

- Report is: UDS Table 9D Charges (page 94). There is an alert for unmapped insurance (nothing should be unmapped).
- If there was a charge, but you never intended to get paid for it, do not report it in Column a. Therefore, there is a column on the datasheet and the output that shows if there was a full write-off the same day the claim was created or on the date of service.
- You should investigate the full-write offs to see if that was indeed the intention. There is a column on the datasheet that shows the code used for the adjustment
- Charges on “Claim without Encounter” are excluded

Table 9D: Payments (Column b) and Allowances (Column d)

- See page 97 of the BridgeIT instructions
- Report: UDS Table 9D Payments and Contractual Adjs

Alerts

- Unmapped insurance
- Payment from source different than the one charged. This is probably okay if from same category. Check those that might be a bit weird (eg, claim charges private insurance but Medicaid paid). We do not want too many differences in the sources of charges and payments.

Table 9D: Payments (Column b) and Allowances (Column d)

- The output for this report groups payments and allowances by Encounter Type. This is done so you can review the different types and decide if they should be included in the total or not
- Open the output with “View for Editing.” Then, in the pivot table, you can remove the Encounter Type column (if you are including all Encounter Types and do not want to group any more), or move it above the table to the filters (and then filter for the types you want).
- You can drag the field directly from the Pivot Table or work with the fields from the Pivot Table list on the right-hand panel

Table 9D: Sliding Discounts (Column e) and Bad Debt Write Off (Column f)

- Table 9D, Line 13 only (Self-pay line)
- See page 100 of the BridgeIT instructions
- Report: UDS Table 9D Sliding Scale and Bad Debts
- Gives the total for these kinds of adjustments, as mapped them in the Mapping Database



Questions?