

Using Bridgelt to Report the UDS Clinical Tables

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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

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

- Data in eCW will be somewhat dynamic, so you might see the 2017 data change if reports are run on different days
- Start looking at your data now but don't gather the final results until later in January or early February.
- Try to run the various 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 reports are run.

Main Manuals

BPHC 2017 UDS Instructions

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

Validating and Reporting the 2017 UDS Clinical Measures (Version 2)

<http://www.rchc.net>

Go to Initiatives → Peer Collaboration → Data Peer Workgroup →

Additional Resources and Companion Documents

- UDS Federal Reporting (2017)

- RCHC UDS 2017 – Financial and Demographic Reports (slides) (12/2017)

-  RCHC UDS 2017 – Financial and Demographic Reports (recording) (12/2017)

- RCHC Validating Reporting – Clinical Measures v2 (11/2017)  #1

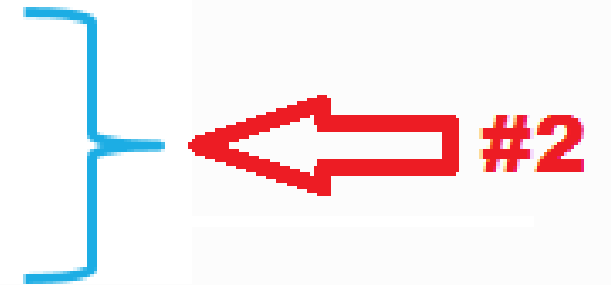
- UDS BridgeIT Reports (slides) (7/2017)

- Early Preparation – UDS Clinical Reports (slides) (9/2017)

-  Early Preparation – UDS Clinical Reports (video) (9/2017)

-  BridgeIT UDS Manual

- BPHC UDS Manual-2017



Validating and Reporting the 2017 UDS Clinical Measures (Version 2)



#1 The Main RCHC Manual

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

Early Preparation for the UDS Report: Beginning the Data Validation Process

By Ben Fouts, MPH
RCHC Data Group Webinar
September 12, 2017

Clinical Validation Process







#2 Data Group Presentation from September

See section on “Clinical Validation Process” for further discussion of system set-up reports and data validation reports

DATA VALIDATION RESOURCES

RCHC Data Group Webinar
By Ben Fouts MPH
November 14, 2017

• Data Quality Assurance

- Benchmarking Basics (4/2017)
 - Clinical Benchmark Examples (8/2017)
 -  Training – Clinical Benchmarking (video)
 - Validating Reporting Instructions – v5
 -  RCHC Data Workgroup – Validation (not specific to a tool) (3/2016)
 -  RCHC Data Validation and Cleaning (BridgeIT Reports) (4/2016)
 - Using BridgeIT Reports for Validation and Cleaning (slides) (4/2016)
 - Data Validation (slides) (11/2017)
 -  Data Validation (recording) (11/2017)
 -  Quality Assurance of EHR Data (slides) (3/2016)
- }  **#3**

#3 Recent Data Group Presentation from last month

Discusses BridgeIT validation resources and data validation theory and practice

Other Important Documents on the Website

- [BridgeIT Report Index \(July 2017\)](#)
- [BridgeIT Technical Document \(July 2017\)](#)
- [BridgeIT Large Instruction Manual \(July 2017\)](#)
- [BridgeIT Set-up Document \(July 2017\)](#)

Make Sure You Have the Right Versions of the Reports

FIRST STEP TO OBTAINING THE CLINICAL SUMMARY DATA

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: July 2017

Instruction manual:	Instructions_Bridgelt Clinical Annual Reports_v13 (July 2017)
Technical document:	Technical_Bridgelt Clinical Annual Reports_v13 (July 2017)
System Set-Up Document:	SystemSetup_Bridgelt Clinical Annual Reports_v6 (July 2017)
Validating the data:	Instructions_Validating_Cleaning_Data_v4 (April, 2016)

Bridgelt Reports

Color coding: New versions of reports and documents in 2017

Report name in Bridgelt	Type		Last update
Adult_Weight_v8	Data summary		April 2017
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	Version 8.2	July 2017

 **Pending Alerts**

Workgroup BridgeIt for eClinicalWorks

User

Toolbox

File

Size 169 MB

Version 9.7.6 Revision 06 Build 31

Platform Microsoft® Office 2010

[Open Information Center](#)

Project Note

This report can be used for validation purposes, or to report the UDS and QIP annual measures. See instructions (separate document available from RCHC) for system requirements and instructions on how to run the report. **Version 8.2:** modified Gender_Identity column; changed exclusion column; modified output names

Workbook

- Annual Clinical Report Set OLD
- Annual Clinical Report Set New
 - Adult_Weight_v8
 - Asthma_Pharma_v7
 - Asthma_Validation_v3
 - Breast Cancer Screen Validation_v3
 - Breast Cancer Screening_v6
 - CAD_LipidLower_v4
 - CAD_Validation_v4
 - Cervical Cancer Screen Validation_v5
 - Cervical Cancer Screening_v8**
 - Reports
 - Excel
 - Alerts
 - Data Sources
 - Data Sets
 - Child_Weight_v6
 - ColRect Cancer Screening_v6
 - ColRect_Image_Validation_v6
 - ColRect_LabTest_Validation_v6
 - Dental_Sealants_v1
 - Depress_Diag_Validation_v6
 - Depress_Screen_Validation_v6
 - Depression_Remission_v2

Context menu for Cervical Cancer Screening_v8:

- 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**

Cervical Cancer Screening_v8

Close **Project Information** Source Project Information Help

Type: Workbook
Category: Annual Clinical Report Set New
Name: Cervical Cancer Screening_v_0122
Version: 0.0.0
Last Modified: 8/16/2017 3:40:20 PM
Shared: Yes
Last Ran: None
Run Time: None hh:mm:ss

SQL Pass Thru: No [View SQL Pass Thru Error](#)

Note: This report can be used for validation purposes, or to report the UDS and QIP annual measures. See instructions (separate document available from RCHC) for system requirements and instructions on how to run the report. **Version 8.2:** modified Gender_Identity column; changed exclusion column; modified output names

Compare the Version Numbers

Cervical Cancer Screening_v8

Cervical Cancer Screening_v8

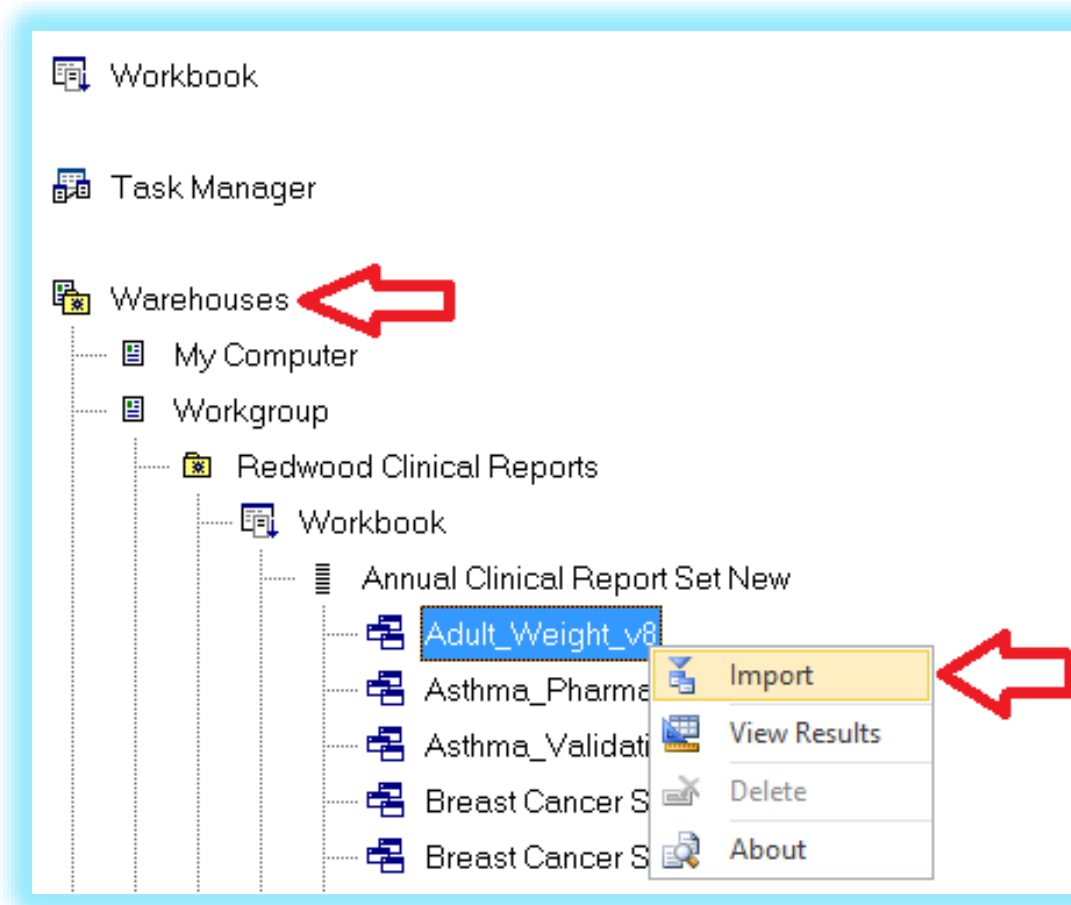
Close Project Information Source Project Information Help

Type: Workbook
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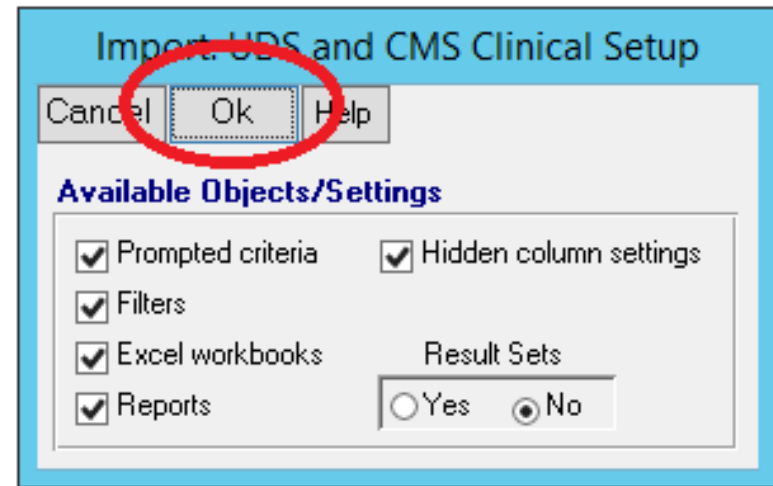
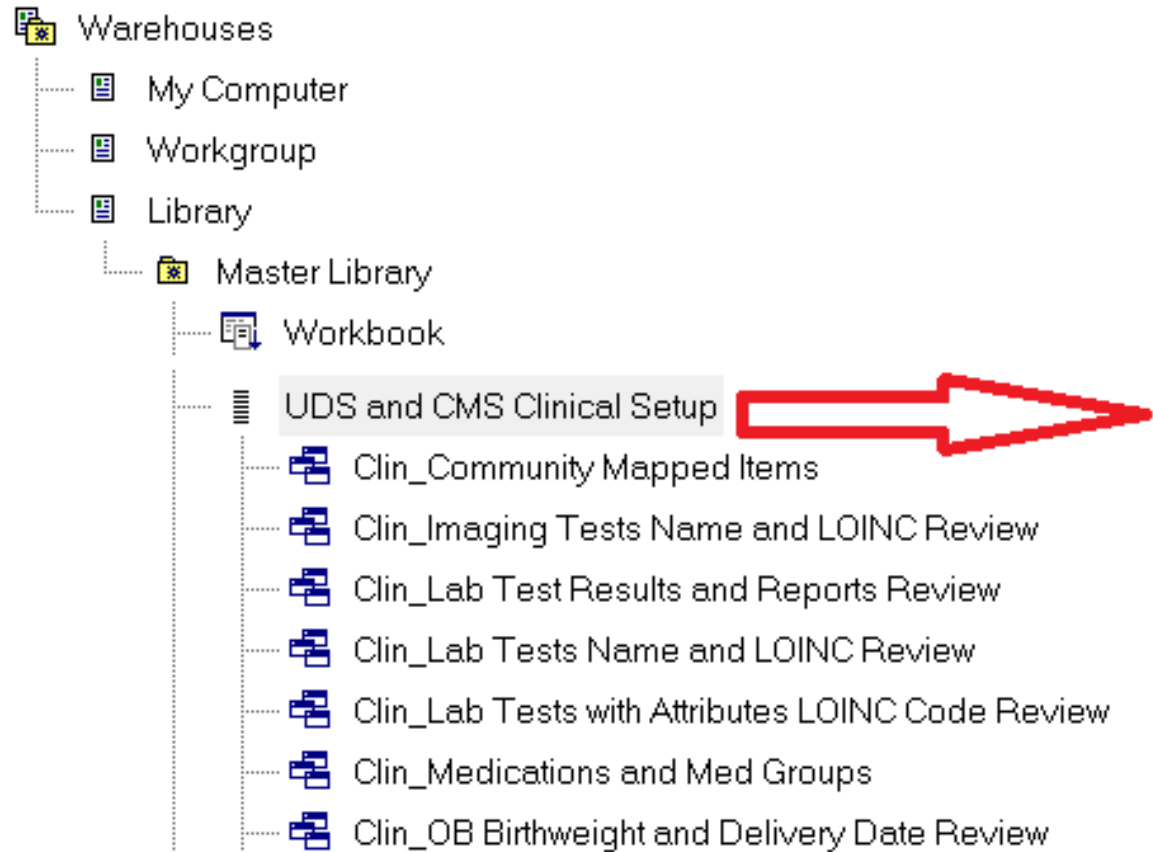
Note: This report can be used for validation purposes, or to report the UDS and QIP annual measures. See instructions (separate document available from BCHS) for system requirements and instructions on how to run the report. Version 8.2: modified Gender_Identity column; changed exclusion column; modified output names

Report name in Bridgett	Type	Version	Last update
Cervical Cancer Screening_v8	Data summary	Version 8.2	July 2017

Right-Click to Import



Additional Set-Up Reports



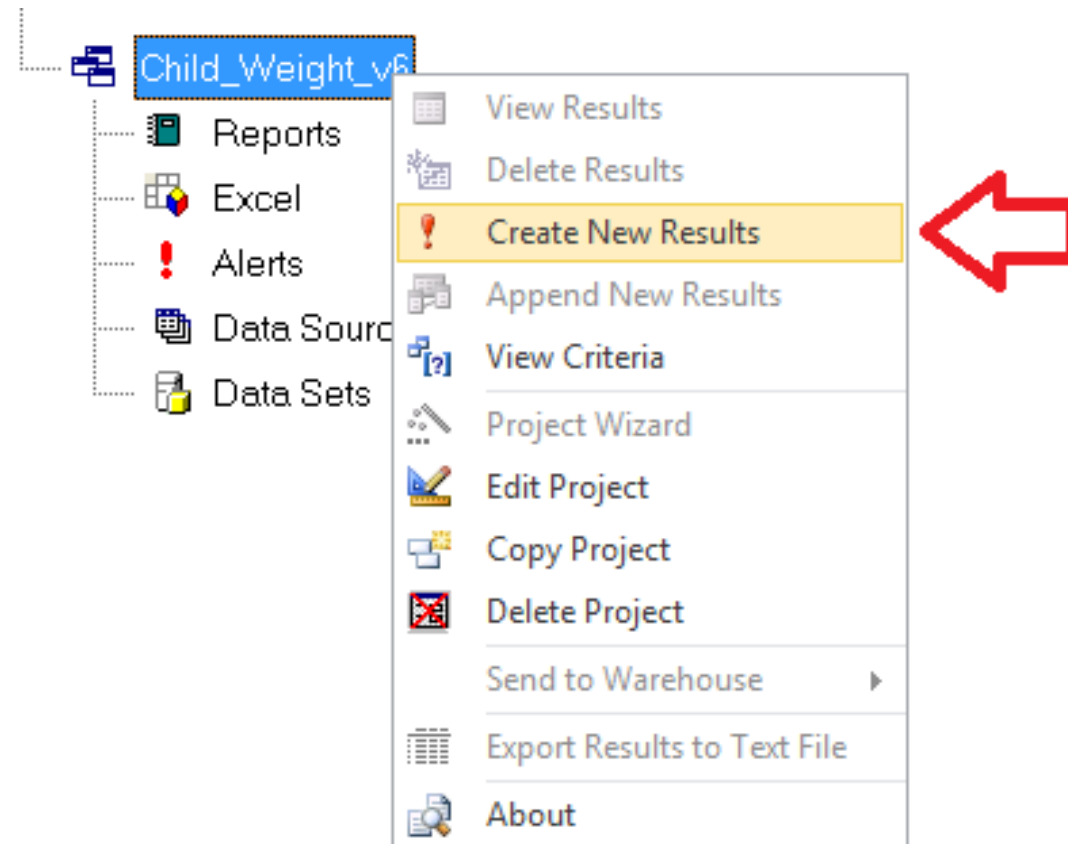
Use the BridgellT UDS Instructions to Run the Reports

YOU NEED TO APPLY THE RIGHT FILTERS AND COPY THE RESULTS
FROM THE RIGHT OUTPUT

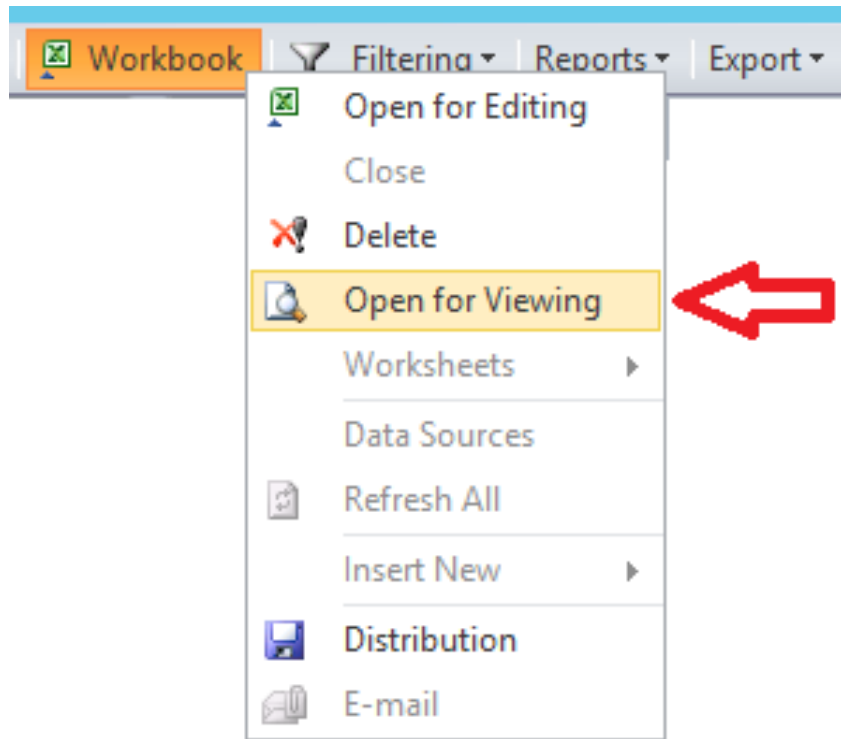
Normal BridgeIT Report Running Sequence

1. Right-click report and choose “Create New Results”
2. Enter measurement period into Parameters (e.g., 1/1/2017 to 12/31/2017)
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

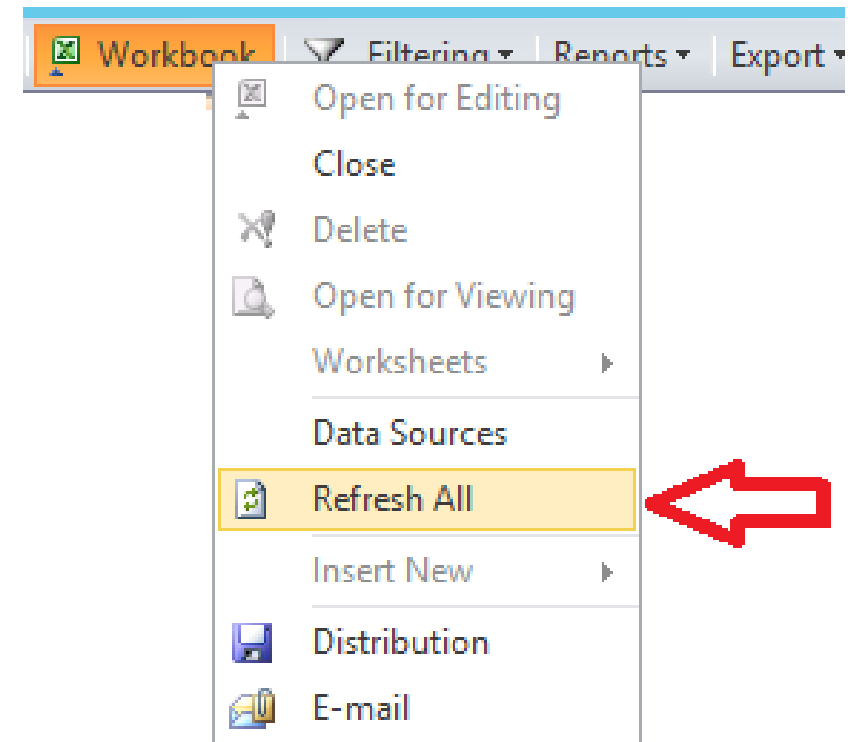
Right-click on report and choose 'Create New Results'



Add Filters, then Open and Refresh the Workbook



THEN...



Example #1: Child and Adolescent Weight Assessment and Counseling

Child and Adolescent Weight Assessment and Counseling

Report name: Child_Weight_v6

Parameters and filters: Upon running the report, enter the measurement period (i.e., 1/1/2017 to 12/31/2017). When viewing the datasheet, patients are automatically filtered for having one or more primary care visits during the measurement period. The user must apply a filter to exclude patients who were pregnant any time during the measurement period (Exclusion_Pregnant not equal to "Exclude").

Result summary: The datasheet "UDS_Summary" in the Excel output displays results that can be used for UDS reporting on Table 6B, Section E. The Grand Total on this worksheet is the denominator (Columns a and b in this section of the UDS report) and the value in the row "Met criteria" is the numerator (Column c, "NUMBER OF PATIENTS WITH COUNSELING AND BMI DOCUMENTED").

Example #1: Child and Adolescent Weight Assessment and Counseling

Measure	Report Name	Filters on data sheet	Output sheet
TABLE 6B – QUALITY OF CARE INDICATORS			
Child and Adolescent Weight Assessment and Counseling	Child_Weight_v6	Exclusion_Pregnant <u>not</u> equal to "Exclude"	UDS_Summary

Example #2: CAD and LDL Lowering Therapy

Measure	Report Name	Filters on data sheet	Output sheet
TABLE 6B – QUALITY OF CARE INDICATORS			
Coronary Artery Disease (CAD): Drug Therapy for Lowering LDL Cholesterol	CAD_LipidLower_v4	<ul style="list-style-type: none">• PrimCareVisitsPeriod >0• PrimCareVisitsEver > 1• UDS_ExcludeLDL <u>not</u> equal to "Exclude"	UDS_LL_Meds_Summary

Example #3: Diabetes Blood Sugar Control

Measure	Report Name	Filters on data sheet	Output sheet
TABLE 7 – HEALTH OUTCOMES AND DISPARITIES			
Blood Sugar Control Among Patients With Diabetes	Diabetes_v7	<ul style="list-style-type: none">• PrimCareVisitsPeriod > 0• UDS_Denominator = "Yes: include in UDS denominator"• UDS_Exclude does <u>not</u> equal "Exclude from UDS denominator"	A1c UDS Race Ethnicity

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 appendix of the large Instructions document (page 99)

Check Labs and Images

- Cervical cancer screening labs (i.e., paps and hpv)
Cervical Cancer Screen Validation_v5
- Colorectal cancer screening labs (i.e., FIT and FOBT)
ColRect_LabTest_Validation_v2
- Colorectal cancer screening images (i.e., colonoscopy and sigmoidoscopy)
ColRect_Image_Validation_v3
- Hemoglobin A1c labs and LDL labs (on same report)
DM_LabTest_Validation_v2

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. See details under the heading “Colorectal Cancer FOBT Lab Test Validation” in the Instructions for Using the Bridgelyt Annual Clinical Report Set, Version 13 (July 2017).
2. Colorectal Cancer Colonoscopy and Sigmoidoscopy Image Validation (ColRect_Image_Validation_v3). The report displays all colonoscopy and sigmoidoscopy images ordered within a period of time that do not have results entered properly into the eCW structured data fields. See details under the heading “Colorectal Cancer Colonoscopy and Sigmoidoscopy Image Validation” in the Instructions for Using the Bridgelyt Annual Clinical Report Set, Version 13 (July 2017).

Example: FIT and FOBT Labs

- ColRect_LabTest_Validation_v2
- Displays all labs ordered in measurement period
- 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 in measurement period
- Filter column MeetsReportingCriteria = “No”
- Reporting criteria are a Result and an image date (a collected date, which is 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 who May Have 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 at your health center 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

- Asthma_Pharma _v7
- Find patients WITHOUT identified persistent asthma BUT USING an asthma control medication
- The Rendering Provider can check the patients displayed
- Filters:
 - ✓ PrimCareVisitsPeriod > 0
 - ✓ ActivePt = "Active"
 - ✓ Exclude_UDS not equal to "Exclude"
 - ✓ HasPersistentAsthma = "No"
 - ✓ AsthmaMedWithin1Y = "Yes"

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
- Add delivery date, birth weight, delivery by grantee, delivery provider, other outcome and multiple births, when applicable

Medications in Medication Groups

- Use the filter and the sort functions to explore the (long) list
- Suggested medication names are on page 44 of the System Set-Up For the Bridgelt Annual Clinical Report Set (Version 6)
- All instances should be mapped
- Reports with meds; asthma, CAD, IVD, tobacco, depression

- ☰ UDS and CMS Clinical Setup
 - ☰ Clin_Community Mapped Items
 - ☰ Clin_Imaging Tests Name and LOINC Review
 - ☰ Clin_Lab Test Results and Reports Review
 - ☰ Clin_Lab Tests Name and LOINC Review
 - ☰ Clin_Lab Tests with Attributes LOINC Code Review
 - ☰ Clin_Medications and Med Groups
 - ☰ Clin_OB Birthweight and Delivery Date Review
 - ☰ Clin_OB Discharge Tab
 - ☰ Clin_OB Initial Physical Tab
 - ☰ Clin_Unattached Documents Pap or Colonoscopy
 - ☰ Clin_Vitals Keys used

Specialty of Primary Care Providers

- This is the 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
- The “Specialty” field on the provider’s record in eCW must have a correctly spelled primary care designation
- See page 6 and 7 of the Technical Document for the designations
- To check the mapping, see the report “Table 5 Provider and Resource Mapping”

Summarize the Data and Compare to Other Sources

THE RESULTS SHOULD BE REALISTIC AND ACCURATE



Gather and Use Comparison Data From Your Organization

- Compare to your 2016 UDS results (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 results
- Note that patient populations and/or definitions may be different

Compare With Results From Other Sources

- The RCHC Benchmark Document (on the RCHC Peer Collaboration website mentioned earlier) has RCHC-wide, state and national averages that can be used as benchmarks
- Healthy People 2020 or other programs that have specific goals

Compare Realistically

- Differences with previously pulled data should be explained logically by differences in definition, changes to clinical quality or data entry quality, etc.
- Hopefully your results will be ‘in the ballpark’ of the benchmarks. If not, could there be a legitimate reason why?
- 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?

Let Ben or Colleen know if you have any questions

Ben is available for one-on-one help too