

2017 OSHPD Reporting Using BridgeIT

RCHC Data Group Presentation

February 13, 2018

By Ben Fouts, Data Analyst

Agenda



1. OSHPD Resources
2. BridgIT Reports
3. General Reporting Procedure



Resources for Preparing the 2017 OSHPD Data

Materials and Procedure Nearly the Same as Last Year

Resource #1: www.RCHC.net

REDWOOD HEALTH COMMUNITY COALITION

Serving Sonoma, Napa, Marin & Yolo Counties

Initiatives ▾ 1

- Community Outreach and Enrollment
- Population Health ▾
- Peer Collaboration** 2
- Redwood Community Health Network
- Redwood Community Care Organization ACO

The screenshot shows the website's navigation menu. The 'Initiatives' menu item is circled in red and labeled with a red '1'. The 'Peer Collaboration' sub-item is also circled in red and labeled with a red '2'. The background of the menu is a blurred image of a person's face and glasses.



Peer Collaboration

Peer Network Groups

RCHC hosts regular convenings and discussions between health center staff where we address common challenges, work on joint programs and grant best practices and lessons learned. Active peer groups include:

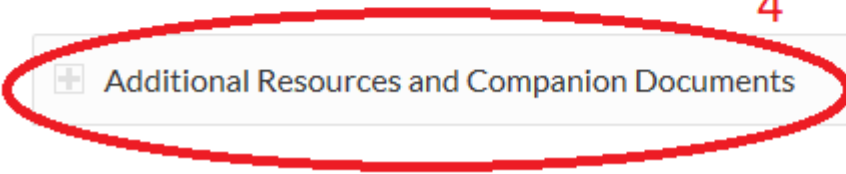

- Medical Directors, RCHC Contact: Colleen Petersen
- Dental Directors, RCHC Contact: Michelle Rosaschi
- Quality Improvement Leads, RCHC Contact: Michelle Rosaschi
- Operations/Nurse Managers, RCHC Contact: Teresa Tillman
- eClinicalWorks Users Group, RCHC Contact: Lisa Israel
- **Data Peer Workgroup, RCHC Contact: Colleen Petersen** 3
- Chief Financial Officers, RCHC Contact: Heidi Burwell

2016 Reporting like 2017





Data Peer Workgroup

The RCHC Data Leads meet monthly on the second Tuesday from 12:30 p.m. by federal, state and agency reporting requirements, as well as, current centers collaborate. The meetings are an opportunity to learn about report look at performance against common benchmarks, and look at systems of

RCHC Contact: Colleen Petersen

• OSHPD State Reporting (2016)

-  BridgeIT OSHPD Manual
-  State of California Forms
-  State of California Instructions
- Report Detail Training (slides)
-  Report Detail Training (video)

 = password needed

BridgeIT OSHPD Manual

- ◉ 2016 Version
- ◉ Does not appear to have a 2017 version
- ◉ Also available on Stephanie's website:

<http://www.heckmanconsulting.com/training/udsnotes.htm>



BridgeIT OSHPD 2016

Data Review and OSHPD Reports

Stephanie Heckman

1/3/2017

State of California Forms and Instructions

- RCHC will upload the 2017 forms along with the slides from this presentation
- State 2017 instructions can also be found on the OSHPD website:

<http://www.oshpd.ca.gov/HID/ALIRTS/FormsUserGuides.html>

- Facility type = “Primary Care & Specialty Clinics”



INSTRUCTIONS FOR COMPLETING

**ANNUAL UTILIZATION REPORT OF PRIMARY CARE CLINICS
(COMMUNITY AND FREE)**

**REPORT PERIOD
JANUARY 1, 2017 THROUGH DECEMBER 31, 2017**

Report Detail Training (Slides)

USING BRIDGEIT TO SUMMARIZE DATA FOR THE 2016 OSHPD REPORT

Redwood Community Health Coalition

Presentation to the Data Group

February 16, 2017

By Ben Fouts, Informatics



Report Detail Training (Video)

- ◉ This is the recording of last year's presentation
- ◉ The Bridgell reports and procedure for obtaining the OSHPD data is the same as last year
- ◉ Review the 2016 slides (begin on slide #9) and watch the presentation for more detail
- ◉ A general summary of the main points in below



Notes on OSHPD Bridgell Reports

Using the Same Reports and Procedures as Last Year

Reports May Already be in Your Toolbox

The screenshot shows the 'Bridgelt® Solutions Toolbox' application window. The title bar includes 'Exit Toolbox', 'Workgroup Options', 'Toolbox Options', 'Information Center', and 'Help'. Below the title bar is a 'Main Form' tab. The main content area is divided into two sections. On the left, there is the Bridgelt logo with the tagline 'Leading the way in data management Since 1995' and a 'Pending Alerts' section. The 'Pending Alerts' section displays the following information: Workgroup: Bridgelt for eClinicalWorks; Version: 9.7.6 Revision: 06 Build: 31; Platform: Microsoft® Office 2010. A yellow button labeled 'Open Information Center' is located below this section. On the right, there is a 'Workbook' pane with a tree view. The 'UDS OSHPD' folder is selected and highlighted in blue. It contains a list of reports, each with a small icon to its left:

- 1_OSHPD Claims Created missing Primary Assessment code
- 1_OSHPD Claims missing Primary CPT Code
- 1_OSHPD_Insurance Mapping
- 1_OSHPD_Provider and Resource Mapping
- OSHPD Sec 2 Encounters by Primary Care Provider and Contacts
- OSHPD Sec 2 Lang and Section 3 Patient Demographics
- OSHPD Section 3 CHDP Assessments
- OSHPD Section 3 Episodic Programs
- OSHPD Section 4 Principal Diagnosis
- OSHPD Section 5 Principal Services
- OSHPD Section 5 Selected Services
- OSHPD Section 6 Contractual Adjustments
- OSHPD Section 6 Encounters and Gross Revenue
- OSHPD Section 6 Non Contractual Adjustments

If Not, You Will Be Directed to the Latest Version When You Click on the Report

- UDS BridgeIT Data Mapping
- UDS Clinical
- UDS Financial
- UDS OSHPD
 - 1_OSHPD Claims Created missing Primary Assessment code
 - 1_OSHPD Claims missing Primary CPT Code
 - 1_OSHPD_Insurance Mapping
 - 1_OSHPD_Provider and Resource Mapping
 - Reports
 - Excel
 - Alerts
 - Data Sources
 - Data Sets

Project: 1_OSHPD_Provider and Resource Mapping

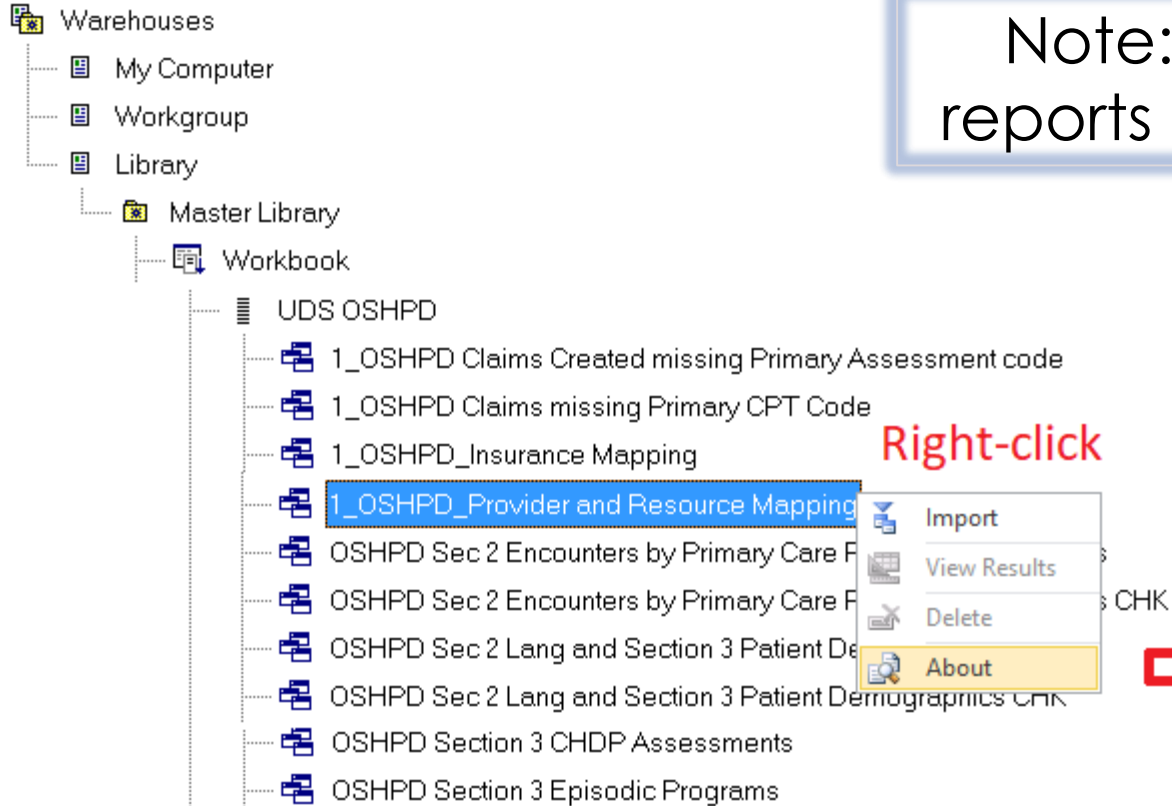
A new version of this project has been identified in the Project Library. Depending on the most recent documentation you may want to replace it with this latest version.

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

Current Version: 5.1.5 [View Documentation](#) [Do Not Show Again](#)

New Version: 5.4.7 [Goto Library Project](#) [CLOSE](#)

Click on "Go to Library Project"
and import the latest version



Warehouses

- My Computer
- Workgroup
- Library
- Master Library
 - Workbook
 - UDS OSHPD
 - 1_OSHPD Claims Created missing Primary Assessment code
 - 1_OSHPD Claims missing Primary CPT Code
 - 1_OSHPD_Insurance Mapping
 - 1_OSHPD_Provider and Resource Mapping**
 - OSHPD Sec 2 Encounters by Primary Care F
 - OSHPD Sec 2 Encounters by Primary Care F
 - OSHPD Sec 2 Lang and Section 3 Patient De
 - OSHPD Sec 2 Lang and Section 3 Patient Demographics CHK
 - OSHPD Section 3 CHDP Assessments
 - OSHPD Section 3 Episodic Programs

Right-click

Import

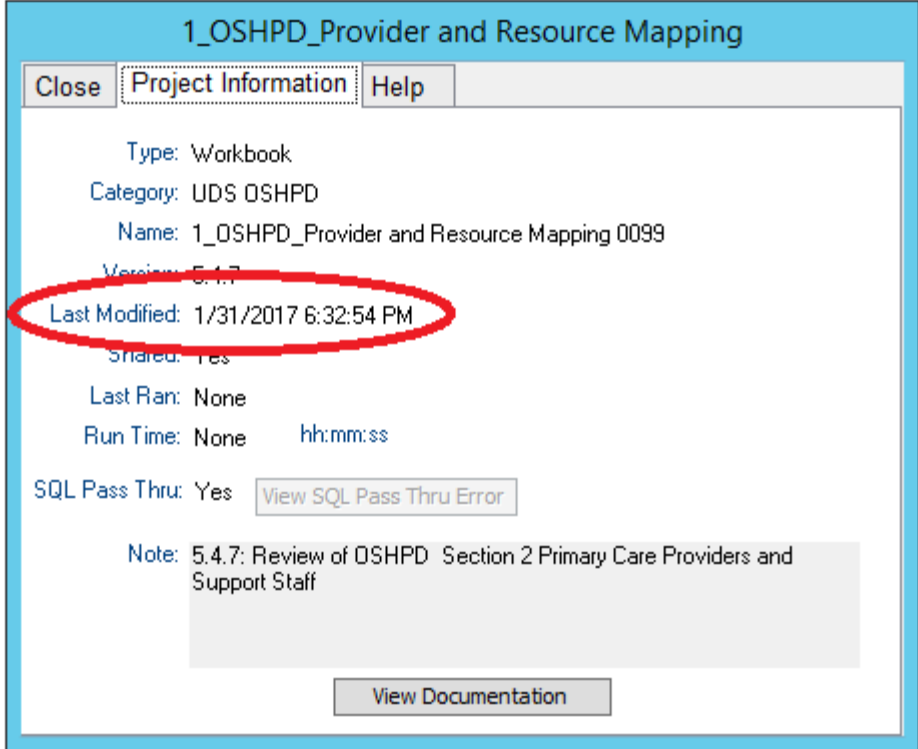
View Results

Delete

About

CHK

Note: it looks like the versions of the reports in the Warehouse are from 2017



1_OSHPD_Provider and Resource Mapping

Close Project Information Help

Type: Workbook

Category: UDS OSHPD

Name: 1_OSHPD_Provider and Resource Mapping 0099

Version: 5.4.7

Last Modified: 1/31/2017 6:32:54 PM

Shared: Yes

Last Ran: None

Run Time: None hh:mm:ss

SQL Pass Thru: Yes [View SQL Pass Thru Error](#)

Note: 5.4.7: Review of OSHPD Section 2 Primary Care Providers and Support Staff

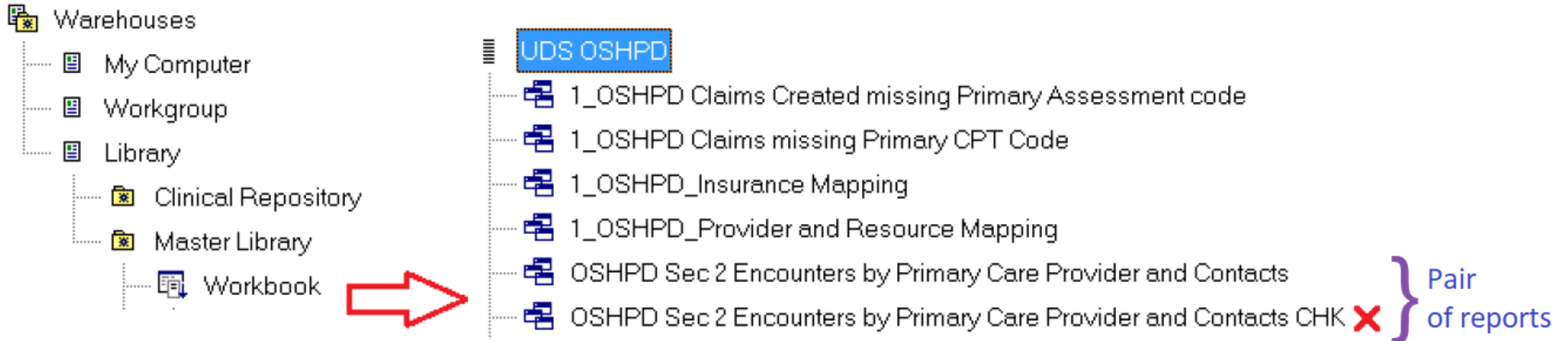
[View Documentation](#)



General Bridgett Reporting Procedure

Refer to the 2016 Presentation for Additional Detail

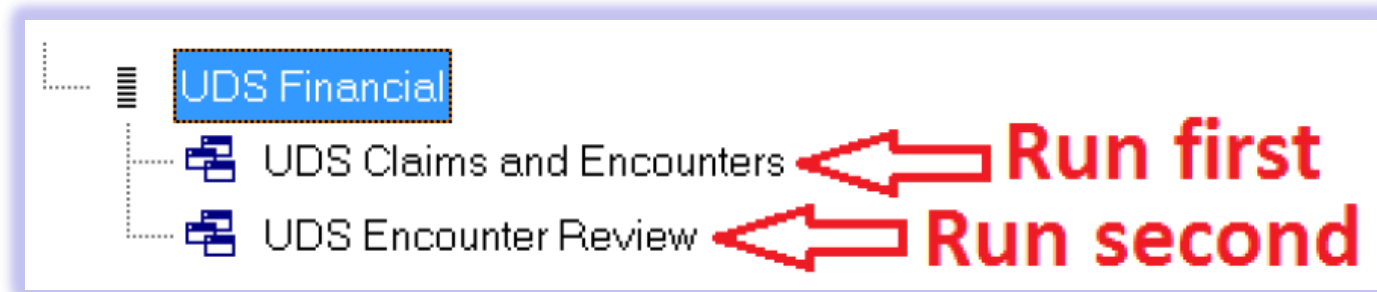
Do not use the “CHK” reports



CHK reports are for health centers that do not bill out of eCW

Run the UDS Financial Reports

- ◉ Similar to the UDS demographic and financial reports, you must run the claims/encounters and encounters review reports before running the OSHPD reports
- ◉ These are in the UDS Financial Folder



Follow Stephanie's Set-up Instructions

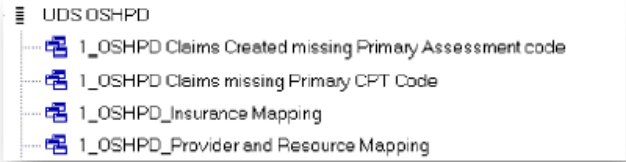
- Similar to UDS Reporting, go through the set-up procedures first
- See pg 4 of the BI manual
- Run the set-up reports for providers and insurance
- Mapping of providers and insurance is done differently for the OSHPD compared to the UDS

BridgeIT for eClinicalWorks OSHPD 2016 v 5.4.6

BridgeIT OSHPD Setup and Data Review

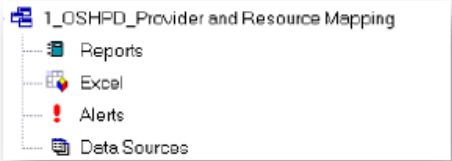
Before running the OSHPD report sections it is recommended that you review Claims, Appointments and Assessment data.

The setup and data review projects are list below:



Provider, Resource and Contact Mapping

PROJECT NAME: 1_OSHPD_Provider and Resource Mapping (5.1.5)



DESCRIPTION: All appointments by provider, resource and staff members during the reporting period. UDS Table 5 mapping is included for reference.

ACTION: Use the mapping directions below to assign the providers, resources and staff contacts to the appropriate OSHPD Section 2 line.

Generate the OSHPD Data

- Similar to UDS Reporting, view any alerts that the reports provide
- Run the summary reports for each section of the OSHPD report
- Begins on page 11 of the BridgellT instruction manual

BridgellT for eClinicalWorks OSHPD 2016 v 5.4.6

Generating OSHPD Data

NOTE: OSHPD reports require data in the UDS Claims and Encounters and UDS Encounter Review in the [Generating UDS Encounter Data](#) section

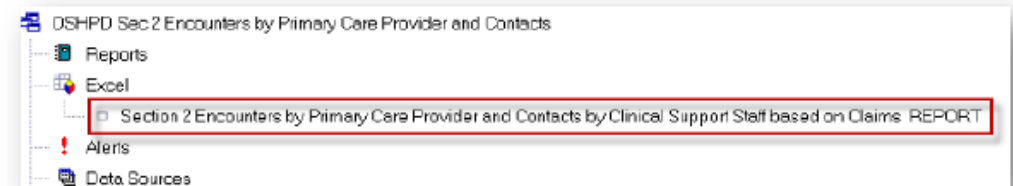
There are two processes supported for the OSHPD reports:

- Based on Claims
- Based on CHK Appointments

Most sites generate the OSHPD report based on claims data. However if you are not using billing claims with eClinicalWorks generated the OSHPD reports Based on CHK Appointments.

Section 2 – Clinic Services based on Claims

PROJECT NAME: OSHPD Sec 2 Encounters by Primary Care Provider and Contacts – (5.1.5)



DESCRIPTION: Requires data in the UDS Encounter Review. The project has a default prompt for Facility. Generates data for Column 5 on Section 2 using Claims only. Unmapped Providers and contacts will not be included.

Bridgell Report List, By OSHPD Section

Section 2	OSHPD Sec 2 Lang and Section 3 Patient Demographics OSHPD Sec 2 Encounters by Primary Care Provider and Contacts
Section 3	OSHPD Sec 2 Lang and Section 3 Patient Demographics OSHPD Section 3 CHDP Assessments
Section 4	OSHPD Section 4 Principal Diagnosis
Section 5	OSHPD Section 5 Principal Services OSHPD Section 5 Selected Services
Section 6	OSHPD Section 6 Encounters and Gross Revenue OSHPD Section 6 Contractual Adjustments OSHPD Section 6 Non Contractual Adjustments

Reporting by Facility

By default, the OSHPD reports are run by encounter facility:

Prompted Restrictions for Project (OSHPD Section 5 Principal Services)

Close Execute Help

Show Prompted Show All View Data Apply Criteria to All Matching Fields Listed

Facility ID Key

Charges Claim Level Summary	InvFacilityId	Is In List	[Criteria Not Set]

Charges Claim Level Summary InvFacilityId Is In List

Press Enter after each entry.

Reference List Sort By Key Description

Facility codes chosen will appear here (can be copied to other reports)

Choose the facilities using this drop-down list

IMPORTANT: make a list of Facility Codes and use the SAME list for each report. You can copy and paste the list or codes

Agreement Between Some OSHPD Tables

- ◉ Unduplicated Patient “Totals” must equal each other
- ◉ Five tables in Section 3 Patient Demographics must equal each other.
- ◉ Encounter “Totals” must equal each other
- ◉ Total encounters in Sections 2, 4, 5, and 6

Selected Procedure Codes (Section 5)

- ◉ You can use alternative sources of data to report on these procedures if the Bridgell report does not display a realistic number based on billing codes
- ◉ Some of these procedures exist in eCW structured data, for example, for example, paps, mammograms, and vaccines.
- ◉ Use the clinical Bridgell reports or the registry

Help with Running the Reports

- ◉ Ben is available by e-mail or phone to support you
- ◉ Send any questions to Colleen and Ben