



COMPLETING THE 2019 OSHPD IN RELEVANT

Data Group Webinar, February 11, 2020

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Agenda

1. Overview of OSHPD Reporting
2. Summary of Relevant OSHPD Reports
3. Setting up the Relevant Reports



OVERVIEW OF OSHHPD REPORTING

Forms and Instructions

Download From the Internet

<https://data.chhs.ca.gov/dataset/primary-care-clinic-annual-utilization-data>

CHHS Open Data

Home > Departments > Office of Statewide Health ... > Primary Care Clinic Annual Utilization Data

Organization

OSHPD

Office of Statewide Health Planning and Development

Office of Statewide Health Planning & Development

California's Office of Statewide Health Planning and Development (OSHPD) is the leader in collecting data and disseminating information about California's healthcare...
[read more](#)

Dataset Topics Activity Stream Showcases

Primary Care Clinic Annual Utilization Data

The complete data set of annual utilization data reported by primary care clinics contains basic clinic identification information including community services, clinic staffing data, including gross revenue, itemized write-offs by program, an income statement, and selected capital project items; and information on encounters by service, principal diagnosis, and trend utilization information for primary care clinics in the form of tables and pivot tables. The primary care clinic trends resource includes information on the number of clinics by type, age, the number of encounters by payer source; and revenues by payer source including the average revenue per encounter.

Data and Resources



2019 Primary Care Clinic Report Form 🔥

← **Forms**

Download

← **Click Here to Download**



2019 Primary Care Clinic Instructions 🔥

← **Instructions**

Download



Individual Reports Search Tool (ALIRTS) 🔥

The Automated Licensing Information and Report Tracking System (ALIRTS)...

More Info

Go to resource

OSHPD Data From Relevant

“Report Page 2”

- LANGUAGES SPOKEN BY STAFF AND PATIENTS
- LANGUAGE SUMMARY

CLINIC SERVICES

Report Page 2 (continued)

LANGUAGES SPOKEN BY STAFF AND PATIENTS*

Line No.		Staff (1)	Patients (2)
50	Arabic		
51	Armenian		
52	Cambodian		
53	Chinese		
54	Hindustani		
55	Hmong		
56	Japanese		
57	Korean		
58	Laotian		
59	Portuguese		
60	Punjabi		
61	Russian		
62	Sign Language		
63	Spanish		
64	Tagalog		
65	Vietnamese		

* **Staff** – Indicate if one or more of your staff members speak a listed language.

Patients – Indicate if 100 patients (or more than 1% of your patient populations) are best served in a listed language. Estimates are acceptable if exact counts are not available.

LANGUAGE SUMMARY

Line No.		(1)
70	Percentage (%) of patient population best served in a non-English language (round to nearest whole percent).	
71	From the languages listed above, enter the primary language (other than English) spoken by your patient population. (There will be a drop down box in SIERA Utilization.)	

OSHPD Data From Relevant

“Report Page 2”

- FTEs AND ENCOUNTERS BY PRIMARY CARE PROVIDER
- FTEs AND CONTACTS BY CLINICAL SUPPORT STAFF

CLINIC SERVICES

Report Page 2 (continued)

FTEs AND ENCOUNTERS BY PRIMARY CARE PROVIDER (do not input any commas)

Line No.	Primary Care Providers	No. of Salaried FTEs* (1)	No. of Contract FTEs* (2)	No. of Volunteer FTEs* (3)	Total FTEs* (4)	No. of Encounters (5)
75	Physicians					
76	Physician Assistants					
77	Family Nurse Practitioners					
78	Certified Nurse Midwives					
79	Visiting Nurses					
80	Dentists					
81	Registered Dental Hygienists (Alternative Practice)					
82	Psychiatrists					
83	Clinical Psychologists					
84	Licensed Clinical Social Workers (LCSW)					
85	Other Providers Billable to Medi-Cal**					
86	Other Certified CPSP Providers Not Listed Above***					
87	Total					

FTEs AND CONTACTS BY CLINICAL SUPPORT STAFF (do not input any commas)

Line No.	Clinical Support staff	No. of Salaried FTEs* (1)	No. of Contract FTEs* (2)	No. of Volunteer FTEs* (3)	Total FTEs* (4)	No. of Contacts (5)
90	Registered Dental Hygienists (Not Alternative Practice)					
91	Registered Dental Assistants					
92	Dental Assistants – Not Licensed					
93	Marriage and Family Therapists (MFT)					
94	Registered Nurses					
95	Licensed Vocational Nurses					
96	Medical Assistants – Not Licensed (1)					
97	Non-Licensed Patient Education Staff					
98	Substance Abuse Counselors (2)					
99	Billing Staff (3)					
100	Other Administrative Staff (4)					
101	Other Providers Not Listed Above					
102	Total					

OSHPD Data From Relevant

“Report Page 3”

- RACE, ETHNICITY, AGE, POVERTY, CHDP
- SEASONAL AGRICULTURAL AND MIGRATORY WORKERS
- PATIENT COVERAGE, EPISODIC PROGRAMS

PATIENT DEMOGRAPHICS

Report Page 3

Do not input any commas for the following tables.

RACE

Line No.	Race	No. of Patients (1)
1	White (include Hispanic)	
2	Black	
3	Native American / Alaskan Native	
4	Asian / Pacific Islander	
5	More Than One Race	
6	Other / Unknown	
7	Total Patients*	

ETHNICITY

Line No.	Ethnicity	No. of Patients (1)
10	Hispanic	
11	Non-Hispanic	
12	Unknown	
13	Total Patients*	

SEASONAL AGRICULTURAL AND MIGRATORY WORKERS

Line No.		Number (1)
75	Total Patients	
76	Total Encounters	

PATIENT COVERAGE

Line No.	Patient Coverage	No. of Patients (1)
45	Medicare	
46	Medicare – Managed Care	
47	Medi-Cal	
48	Medi-Cal – Managed Care	
49	County Indigent / CMSP / MISP	
50	Private Insurance	
51	Covered California	
52	Alameda Alliance for Health	
53	My Health LA (MHLA)	
54	PACE Program	
55	Self-Pay / Sliding Fee	
56	Free	
57	All Other Payers	
58	Total Patients*	

* Totals for these tables must agree

FEDERAL POVERTY LEVEL

Line No.	Federal Poverty Level	No. of Patients (1)
20	Under 100%	
21	100 – 138%	
22	139 – 200%	
23	201 – 400%	
24	Above 400%	
25	Unknown	
26	Total Patients*	

AGE CATEGORY

Line No.	Age Category	Males (1)	Females (2)
30	Under 1 Year		
31	1 – 4 Years		
32	5 – 12 Years		
33	13 – 14 Years		
34	15 – 19 Years		
35	20 – 34 Years		
36	35 – 44 Years		
37	45 – 64 Years		
38	65 and Over		
39	Total Patients*		

EPISODIC PROGRAMS

Line No.	Episodic Programs	No. of Patients (1)
60	BCCCP	
61	CHDP	
62	Family PACT	
63	Other County Programs	
64	Children’s Treatment Program	
65	Other Payer – Covered by Grant	
66	Total Episodic Patients (Duplicated)	

CHILD HEALTH AND DISABILITY PREVENTION (CHDP)

Line No.		Number (1)
70	CHDP Assessments	

OSHPD Data From Relevant

“Report Page 4”

- ENCOUNTERS BY PRINCIPAL DIAGNOSIS

ENCOUNTERS BY PRINCIPAL DIAGNOSIS Report Page 4

Report the diagnosis (or symptom, condition, problem, or complaint) as the main reason for the encounter. Do not report the secondary diagnosis(es). There should be only one principal diagnosis for each encounter.

ENCOUNTERS BY PRINCIPAL DIAGNOSIS (do not input any commas)

Line No.	Classification of Diseases and/or Injuries for each Principal Diagnosis	ICD-10-CM Codes	No. of Encounters (1)
1	Infectious and Parasitic Diseases	A00 - B99	
2	Neoplasms	C00 - D49	
3	Endocrine, Nutritional, and Metabolic Diseases; and Immunity Disorders	E00 - E89	
4	Blood and Blood Forming Disorders	D50 - D89	
5	Mental, Behavioral, and Neurodevelopment Disorders	F01 - F99	
6	Nervous System and Sense Organs Diseases	G00 - H95	
7	Circulatory System Diseases	I00 - I99	
8	Respiratory System Diseases	J00 - J99	
9	Digestive System Diseases, excluding dental diagnoses	K20 - K95	
10	Genitourinary System Diseases	N00 - N99	
11	Pregnancy, Childbirth & the Puerperium	O00 - O9A	
12	Skin and Subcutaneous Tissue Diseases	L00 - L99	
13	Musculoskeletal System and Connective Tissue Diseases	M00 - M99	
14	Congenital Anomalies	Q00 - Q99	
15	Certain Conditions Originating in the Perinatal Period	P00 - P98	
16	Symptoms, Signs, and Ill-defined Conditions	R00 - R99	
17	Injury and Poisoning	S00 - T88	
18	Factors Influencing Health Status and Contact with Health Services	Z00 - Z29, Z40 - Z99	
19	Dental Diagnosis	K00 - K14	
20	Family Planning "Z" Codes	Z30 - Z39	
21	Other	All other codes not in lines 1-20	
22	Total		

OSHPD Data From Relevant

“Report Page 5”

- o ENCOUNTERS BY PRINCIPAL SERVICE

ENCOUNTERS BY PRINCIPAL SERVICE

Report Page 5

Classify each encounter by the principal CPT code that was reported on the billing document for this encounter. Do not report secondary procedures. There should be one and only one procedure code reported for each encounter.

ENCOUNTERS BY PRINCIPAL SERVICE (do not input any commas)

Line No.	Principal Service	CPT Codes	No. of Encounters (1)
	EVALUATION AND MANAGEMENT SERVICES		
1	Evaluation and Management (new patient)	99201 - 99205	
2	Evaluation and Management (established patient)	99211 - 99215	
3	Hospital Related Services	99217 - 99226, 99231 - 99239	
4	Consultations	99241 - 99245, 99444, 99451 - 99453 99291 - 99292, 99354 - 99360, 99415 - 99416, 99450, 99455 - 99456, 99499	
5	Other Evaluation and Management Services		
6	Nursing Facility Related Services	99304 - 99318	
7	Case Management Services	99366 - 99368	
8	Preventive Medicine (infant, child, adolescent)	99381 - 99384, 99391 - 99394, 99460 - 99463	
9	Preventive Medicine (adult)	99385 - 99387, 99395 - 99397, 99429	
10	Counseling	99401 - 99404, 99406 - 99409, 99411 - 99412	
	ALL OTHER SERVICES		
11	Anesthesia	00100 - 01999, 99100, 99116, 99135, 99140, 99151 - 99157	
12	Integumentary System	10004 - 10499	
13	Musculoskeletal System	20005 - 29999	
14	Respiratory System	30000 - 32999	
15	Cardiovascular System	33010 - 37799	
16	Hemic and Lymphatic System	38100 - 38999	
17	Mediastinum and Diaphragm System	39000 - 39599	
18	Digestive System	40490 - 49999	
19	Urinary System	50010 - 53899	
20	Male Genital System	54000 - 55899	
21	Intersex Surgery	55970, 55980	
22	Female Genital System	56405 - 58999	
23	Maternal Care and Delivery	59000 - 59899	
24	Endocrine System	60000 - 60899	
25	Nervous System	61000 - 64999	
26	Eye and Ocular Adnexa System	65091 - 68899	
27	Auditory System	69000 - 69979	
28	Radiology	70010 - 79999	
29	Pathology / Laboratory	80047 - 89356, 89398	
30	Medicine - Special Services	90281 - 99091, 99170 - 99199	
31	Family Planning "Z" Codes	"Z" codes	
32	Dental Encounters (CDT codes)	D0100 - D0999	
33	CPT Category III Codes	0042T - 0542T	
34	Other	All other codes not in lines 1-33	
35	Total		

OSHPD Data From Relevant

“Report Page 5”

- SELECTED PROCEDURE CODES

SELECTED PROCEDURES

Report Page 5 (continued)

Report the number of procedures for each code (or range of codes) regardless of whether it is the principal or secondary procedure code.

SELECTED PROCEDURE CODES [do not input any commas]

Line No.	Selected Procedures	CPT Codes	No. of Procedures (1)
40	Mammogram	77053 - 77067	
45	HIV Testing	86689, 86701 - 86703, 87389 - 87391	
50	Pap Smear	88150 - 88153, 88164 - 88167, 88174 - 88175	
51	Contraceptive Management	11976, 11980, 55250, 55300, 55400, 57170, 58300 - 58301, 58600, 58605, 58611, 58615	
	VACCINATIONS		
52	DTap, DTP, Diphtheria and Tetanus	90389, 90696, 90702, 90714 - 90715, 90723	
53	Hemophilus Influenza B (Hib)	90644, 90647 - 90648	
60	Hepatitis A	90632 - 90634, 90636	
61	Hepatitis B	90739 - 90740, 90743 - 90744, 90746 - 90747	
62	HepB and Hib	90748	
63	Influenza Virus Vaccine	90630, 90653, 90662, 90664, 90666 - 90668, 90672 - 90673, 90682, 90685 - 90688, 90756	
64	Measles, Mumps and Rubella (MMR) and Varicella (MMRV)	90707, 90710, 90716	
65	Pneumococcal	90670, 90732	
66	Poliovirus	90713	
67	Varicella	90396, 90716	

OSHPD Data NOT From Relevant

- Report Page 6: REVENUE AND UTILIZATION BY PAYMENT SOURCE
- Report Page 7: INCOME STATEMENT



SUMMARY OF RELEVANT OSHPPD REPORTS

And how to prepare data outside of Relevant

Relevant Approach to OSHPD

- Data will come from the REPORTS section of Relevant
- Some reports based on the “Analytics” database (which is based on Importers) and others based on the “Staging” database (which is based on Transformers)
- If your health center has slightly different names for certain Transformers, you may need to tweak the code in a report based on the “Staging” database

List of Relevant Report Names

Reports in the Analytics Database

- Encounters by Provider / Contacts by Staff (OSHDPD 2019)
- Selected Procedures (OSHDPD 2019)
- Patient Demographics (OSHDPD 2019)

The same reports are used for eCW and NextGen

List of Relevant Report Names

Reports in the Staging Database

- Patient Coverage and Episodic Programs (OSHPD 2019)
- Encounters by Principal Diagnosis and Service (OSHPD 2019)

Different report versions for eCW and NextGen

Master Copies of Reports are on the RCHC Aggregate Instance of Relevant

Reports

Search

OSHPD

Report Sets ▾
All

Filter by Report Sets

Search

Grants
OSHPD 2019

Name

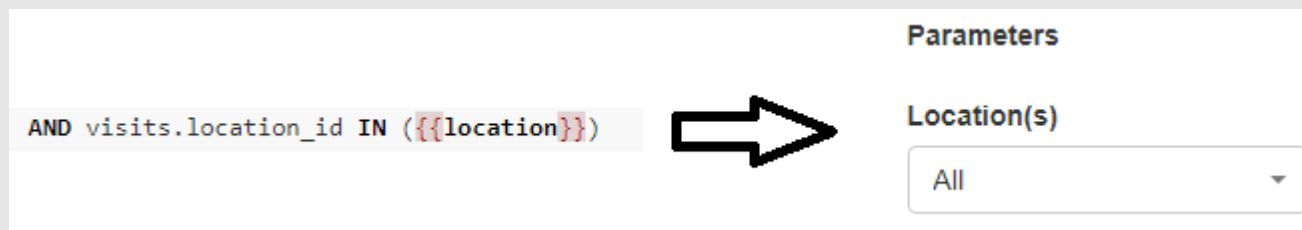
Encounters by Provider / Contacts by Staff (OSHPD 2019) - Nextgen and eCW
Selected Procedures (OSHPD 2019) - Nextgen and eCW
Patient Demographics (OSHPD 2019) - Nextgen and eCW
Patient Coverage and Episodic Programs (OSHPD 2019) - eCW
Encounters by Principal Diagnosis and Service (OSHPD 2019) - eCW
Encounters by Principal Diagnosis and Service (OSHPD 2019) - Nextgen

Health Center Preparation

- Copy the report name and SQL to your own instance of Relevant. Suggestion: keep a copy of the original code in your files in case you have to tweak the report and something goes wrong.
- To see the SQL, click on the report name in the RCHC aggregate instance, then click on the small “i” next to the report name

Reports: Encounters by Provider / Contacts by Staff (OSHPD 2019) - Nextgen and eCW ⓘ 

- Also, set-up the parameters once copied to your own instance



The diagram illustrates the process of mapping a SQL parameter placeholder to a report parameter. On the left, a SQL snippet is shown: `AND visits.location_id IN ({{location}})`. A large black arrow points from this snippet to the right. On the right, a report parameter configuration is shown. The parameter is named "Location(s)" and is set to "All". The overall section is titled "Parameters".

Parameters

Location(s)

All

Health Center Preparation

- It is recommended that you make a separate “master” list of providers and insurance names and how they map to their respective OSHPD categories
- This allows you to independently verify that Relevant is picking up and organizing these lists into the correct categories
- Furthermore, this documentation can be used next year (consistency is important)

Health Center Preparation

- Also, add the UDS categories to the list and see if there is consistency for each provider and insurance
- Make sure that you get confirmation of the categories from an expert at your health center (e.g., a human resources person or manager for staff; a finance or billing person for insurance)
- If you do not use the “dummy code” method of mapping explained later in this presentation, you will need these lists for the importing or CASE WHEN methods

OSHPD Categories Different than UDS

PATIENT COVERAGE

Line No.	Patient Coverage	No. of Patients (1)
45	Medicare	
46	Medicare – Managed Care	
47	Medi-Cal	
48	Medi-Cal – Managed Care	
49	County Indigent / CMSP / MISP	
50	Private Insurance	
51	Covered California	
52	Alameda Alliance for Health	
53	My Health LA (MHLA)	
54	PACE Program	
55	Self-Pay / Sliding Fee	
56	Free	
57	All Other Payers	
58	Total Patients*	

PRIMARY CARE PROVIDERS

Line No.	Primary Care Providers
75	Physicians
76	Physician Assistants
77	Family Nurse Practitioners
78	Certified Nurse Midwives
79	Visiting Nurses
80	Dentists
81	Registered Dental Hygienists (Alternative Practice)
82	Psychiatrists
83	Clinical Psychologists
84	Licensed Clinical Social Workers (LCSW)
85	Other Providers Billable to Medi-Cal**
86	Other Certified CPSP Providers Not Listed Above***
87	Total

Health Center Preparation

- Furthermore, if your health center has multiple sites, you may have to group the locations into the licensed clinics that appear in the online OSHPD reporting tool
- Make a Master List of these sites and organize them by licensed clinic.
- Ensure that this list is approved by a contract specialist at your health center (i.e., someone who knows about the licenses... the groupings may not be as obvious as you think)
- The “Location(s)” parameter allows you to run the report for a single or group of locations, depending on how those appear in your EHR

Definition of an OSHPD Encounter

1. Is a visit in Relevant (i.e., present on the Importer “Visits”)
2. Is part of the UDS Universe (i.e., uds_universe = TRUE on the Importer “Visits”)
3. Has a Claim associated with it (i.e., present on the Importer “Claims”)
4. The provider on the visit is one mapped to the OSHPD Provider Categories (Report Page 2, lines 75 to 86)

Encounter Agreement

There must be agreement in the number of encounters among a number of tables

Report Page 2
PRIMARY CARE PROVIDERS

87	Total
----	-------

Report Page 4
ENCOUNTERS BY PRINCIPAL DIAGNOSIS

22	Total
----	-------

Report Page 5
ENCOUNTERS BY PRINCIPAL SERVICE

35	Total
----	-------

Report Page 6
REVENUE AND UTILIZATION BY PAYMENT SOURCE

		Total (18)
1	Encounters	



SETTING UP THE RELEVANT REPORTS

Steps you can take yourself or with your Relevant contact

Relevant Instructions Sent by E-Mail Today From Colleen



OSHPD 2019 - Relevant Instructions

Relevant has created a number of custom reports to assist with OSHPD 2019 reporting. Many thanks to Brian Fogarty and to Communicare in general for allowing us to test these on their app and for providing very helpful feedback.

Staging / Relevant databases

We used the Relevant database as much as possible in order to leverage data that has already been mapped and to create reports that will work at RCHC member health centers using Nextgen or eCW. However, some reports contain data points that are not already in the Relevant database or are mapped differently, so we had to write some of the reports in Staging. We used Transformer tables wherever possible, but please note that you may have to tweak the names of some of the tables for the reports that rely on Staging - **please email us at support@relevant.healthcare if you have any questions or would like our assistance.**

All reports have Location filters so you can view them based on the location of visits/patients in question.

Definition of an OSHPD Encounter / Matching counts

Because it is important to have a consistent count across tables, we took care to make sure the definition of an encounter is the same in all reports. The default approach is that an OSHPD encounter is one that:

- Is a Visit in Relevant - it shows up in the Visits importer
- Has a claim associated with the visit - it shows up in the Claims importer
- Is a UDS visit - "uds_universe" is TRUE on the Visits importer
- The provider matches one of the OSHPD Provider Categories (line 75-86)

Make sure that the total encounters match exactly on the following reports:

- Encounters by Provider / Contacts by Staff (OSHPD 2019): just encounters, not contacts
- Encounters by Principal Diagnosis and Service

1. Importer: Staff Member Types

- This existing importer does not display any patient data, but is used to organize types of staff using codes
- Copy additional code in the Relevant instructions to the Importer

```
-- Added for OSHPD
(79, 'visiting_nurses', 'Visiting Nurses', 'medical'),
(81, 'registered_dental_hygienists_alt_practice', 'Registered Dental
Hygienists (Alternative Practice)', 'dental'),
(86, 'other_certified_cpssp_providers', 'Other Certified CPSP
Providers', 'other_professional_services'),
(90, 'registered_dental_hygienists_not_alt_practice', 'Registered
Dental Hygienists (Not Alternative Practice)', 'dental'),
(91, 'registered_dental_assistants', 'Registered Dental Assistants',
'dental'),
(92, 'dental_assistants_not_licensed', 'Dental Assistants - Not
Licensed', 'dental'),
(93, 'marriage_and_family_therapists', 'Marriage and Family
Therapists (MFT)', 'mental_health'),
(95, 'licensed_vocational_nurses', 'Licensed Vocational Nurses',
'medical'),
```

Mapping Providers and Insurance to OSHPD Categories

- eCW users can use the dummy field or work with their eCW contact to map providers and insurance
- NextGen users will work with Amber (@relevant) to map providers and insurance since they have not traditionally used a dummy field for mapping

2. Create new Transformer

- New Transformer name: “relevant_oshpd_provider_mapping”
- The goal of this Transformer is to display an OSHPD line number for the providers, resources and staff who you want mapped in Report Page 2
- For eCW health centers, use the standard dummy fields (see next slides), import a custom list, or use CASE WHEN statements
- For NextGen health centers, this will involve importing a custom list (or using CASE WHEN statements)

2. Create new Transformer (continued)

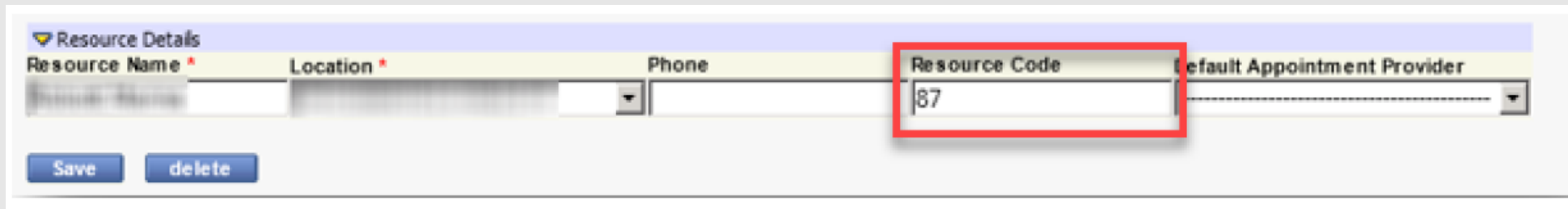
- Standard: eCW Health Centers use “dummy” fields to store the OSHPD line numbers
- The standard manner for Providers is to use the Social Security Number field in the Provider record as a “dummy” field



The image shows a screenshot of a web-based form titled "Personal Info". The form is organized into three columns. The first column contains fields for Last Name, Prefix, Taxonomy Code, Date of Birth, Mailing Address, Zip Code, Pager, and Primary Service Location. The second column contains fields for First Name, Suffix, Speciality (a dropdown menu), Social Security No (highlighted with a red box), City, Home Phone, Fax No, and gender options (Male/Female). The third column contains fields for Middle Initial, Degrees/Credentials, Provider Initials, DEA No, State, Mobile, and Print Name. A red arrow points from the text "OSHPD Section 2 line no" to the Social Security Number field.

2. Create new Transformer (continued)

- Staff also mapped using the Social Security Number (eCW)
- Resources are mapped using the Resource Code (eCW)



The screenshot shows a web form titled "Resource Details". The form has several fields: "Resource Name *", "Location *", "Phone", "Resource Code", and "Default Appointment Provider". The "Resource Code" field contains the value "87" and is highlighted with a red rectangular box. Below the form are two buttons: "Save" and "delete".

Resource Name *	Location *	Phone	Resource Code	Default Appointment Provider
			87	

- Note: check the Provider codes that may already exist in the dummy fields. NOTE that all of the line numbers changed in 2018

Note on Insurance (eCW)

- Standard: eCW Health Centers use “dummy” fields to store the OSHPD line number for the Insurance
- The standard manner is to use the Managed Care Plan ID for the column number of Report Page 6
- There is not a separate Transformer for insurance

The screenshot shows a software dialog box titled "Update Insurance (1516 - AETNA)". It has several tabs: "Address", "Notes", "UB92 Setup", "FQHC Setup", "Payment Codes/Alert", "Provider Numbers", and "Capitation". The "Address" tab is active. The form contains the following fields and values:

- Name: AETNA
- Address 1: PO Box 12340
- Address 2: (empty)
- City: FRESNO
- State: CA
- Zip: 93765
- Tel: 800-238-6299
- Ex: (empty)
- E-mail: (empty)
- Website: (empty)
- Payor ID: 123454
- Medigap ID: (empty)
- FRA Payor ID: 123454
- Managed Care Plan ID: (empty) - This field is highlighted with a red box and a red arrow points to it from the text "Section 6 Payment Source Column Number".
- Eligibility Payer ID: 1221111
- Fee Schedule: 2007 Medicare Fee Sch
- Enable Fee Schedules By Location: (unchecked)
- Source of Payment: MB ANSI-Medicare Part B
- Insurance Type: SP Supplemental Policy
- Claim Submission: Electronic, Paper
- Claim Type: Professional (HCFA), Institutional (UB92), Dental
- Insurance Class: A Self Pay
- Inactive: (unchecked)
- FP String mandatory: (checked)

At the bottom of the dialog box, there are buttons for "Assoc. Insurance Groups", "Assoc. Fee Schedules", "Options", "OK", and "Cancel".

Insurance Line Numbers

From Report Page 6

PAYMENT SOURCE								
Medicare	Medicare – Managed Care	Medi-Cal	Medi-Cal – Managed Care	County Indigent / CMSP / MISP*	Private Insurance	Covered California	Self-Pay / Sliding Fee	Free
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)

Breast Cancer Programs*	CHDP	Family PACT	PACE Program**	My Health LA (MHLA)	Alameda Alliance for Health	Other County Programs	All Other Payers
(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)

```
( '01', 'Medicare'),
( '02', 'Medicare - Managed Care'),
( '03', 'Medi-Cal'),
( '04', 'Medi-Cal - Managed Care'),
( '05', 'County Indigent/CMSP/MISP'),
( '06', 'Private'),
( '07', 'Covered California'),
( '08', 'Self-Pay/Sliding Fee'),
( '09', 'Free'),
( '10', 'Breast Cancer Programs*'),
( '11', 'CHDP'),
( '12', 'Family PACT'),
( '13', 'PACE Program'),
( '14', 'My Health LA (MHLA)'),
( '15', 'Alameda Alliance for Health'),
( '16', 'Other County Programs'),
( '17', 'All Other Payers');
```


3. Modify Transformer “relevant_providers”

- eCW Health Centers
- Add the column “staff_member_type_id” by copying the code in the instructions
- Add the column “staff_member_id” by copying the code in the instructionsRun the Transformer to make sure it works

4. Modify Importer “Providers”

- eCW Health Centers
- Add the column “staff_member_type_id” from the Transformer to the Importer
- Add the column “staff_member_id” from the Transformer to the Importer
- Run the Importer to make sure it works

5. Enable the Importer “Staff Members”

- eCW and NextGen
- Enable the Importer and copy the code in the instructions
- Run the Importer to make sure it works

6. Enable the Importer “Staff Member FTE Segments”

- eCW and NextGen
- Enable the Importer and copy the code in the instructions
- Run the Importer to make sure it works

- By default, the code will not automatically display FTE segments. You will have to import them (work with your Relevant contact)

Next Steps

- Look through the Relevant OSHPD instructions and decide to make the changes yourself or work with your Relevant contact to complete the set-up
- Decide how to map your providers and insurance (i.e., dummy codes, importing a list, CASE WHEN statements)
- Consider a validation process for the data, either by comparing (where possible) to the UDS, running BridgellT reports or using other sources
- The reports in the RCHC Aggregate database should be published very soon

Questions?