

# 2021 HCAi Report: Relevant Instructions

A number of custom reports are available to assist with 2021 HCAi reporting (formerly known as OSHPD reporting). These instructions describe the reports and how to configure them along with associated Transformers. This document was originally developed by Relevant for the 2019 reporting period but has been modified by RCHC for the 2021 reporting period.

## Relevant Staging / Analytics Databases

The Analytics Database was used in the design of the reports 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 Analytics Database or are mapped differently, so some of the reports are designed in the Staging Database. Reports based on the Staging Database have separate eCW and NextGen versions and you may need to tweak the names tables or fields to get them to work (depending on the unique set-up at your health center). **Please email us at [support@relevant.healthcare](mailto:support@relevant.healthcare) if you have any questions or would like our assistance.**

All reports have Location parameters so you can view them based on the location of visits/patients in question. All reports also have measurement period parameters so they can be run for any calendar year, as long as the current mapping in your system accurately manages data from distant years.

## Definition of an HCAi Encounter / Matching counts

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

- Is a visit in Relevant -- it shows up in the Visits Data Element
- Has a claim associated with the visit -- it shows up in the Claims Data Element
- Is a UDS visit -- "uds\_universe" is TRUE on the Visits Data Element
- Has a visit provider matching one of the HCAi Provider Categories (lines 75-86 of "Report Page 2" <sup>1</sup>)

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

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

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<sup>1</sup> Reference to the section titled "Report Page 2" in the document "ANNUAL UTILIZATION REPORT OF PRIMARY CARE CLINICS – 2021" by HCAi. A similar approach is used elsewhere to reference the forms titled as "Report Pages"

## Reports in the Analytics Database

The following reports have one version that works with both Nextgen and eCW health centers.

### Encounters by Provider / Contacts by Staff (HCAi 2021)

This report covers the encounter/contact counts for the “CLINIC SERVICES” section on “Report Page 4.” In order for the report to work properly, you must map providers to the correct HCAi categories, both in your EHR and in Relevant. Note that the first two tabs of the output display the results for the report, and the last two tabs display any providers or contacts with visits in the period who are not mapped, for validation purposes.

### Selected Procedures (HCAi 2021)

This report covers the HCAi section of the same name (see “Report Page 5”). The first tab shows overall numbers, while the second lists the actual codes for validation purposes.

### Patient Demographics (HCAi 2021)

This report covers most of the data required for the section PATIENT DEMOGRAPHICS on “Report Page 3”, as well as counts for languages spoken by patients. Please note that the sections for “Patient Coverage” in this report may not adhere to the HCAi categories. There is a supplemental report below that covers these.

## Reports in the Staging Database

The following reports have separate eCW and Nextgen versions.

### Encounters by Principal Diagnosis and Service (HCAi 2021)

This report covers the HCAi sections of the same name (see “Report Page 5”) and relies on the following Transformers:

- relevant\_claims
- relevant\_visits
- relevant\_providers

### Patient Coverage and Episodic Programs (HCAi 2021)

This report requires some customization, particularly in the “coverage group” column. The Nextgen version must be custom-built for each Nextgen health center. Alternatively, Nextgen health centers may calculate totals from the report Patient Demographics (HCAi 2021).

This report covers the Patient Coverage and Episodic Programs tables of PATIENT DEMOGRAPHICS (see “Report Page 3”). By default, the HCAi insurance comes from a dummy field, which is the “Managed Care Plan ID” field on the “Address” tab for the individual insurance in eCW. Note: you may need to edit the SQL to clean up any NULL values for insurance groups, and/or to change the field names on some Transformer tables.

The Transformers needed are:

- relevant\_visits
- relevant\_patients
- relevant\_insurance\_enrollments
- relevant\_payers
- relevant\_payer\_groups

## General Instructions

The following steps are required for all health centers, regardless of EHR, in order for the HCAi reports to work properly. If you have already taken any of these steps in prior years, please disregard. Note that the old term OSHPD is used in the SQL code, but it is synonymous with HCAi.

1. Add the following values to the bottom of your “Staff Member Types” Data Element, after the line that starts “(45” and before the last line, and add a comma to the end of the “(45” line. Run the Data Element to make sure it works:

```
-- Added for OSHPD
(79, 'visiting_nurses', 'Visiting Nurses', 'medical'),
(81, 'registered_dental_hygienists_alt_practice', 'Registered Dental Hygienists (Alternative Practice)', 'dental'),
(86, 'other_certified_cpdp_providers', 'Other Certified CPDP 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'),
(96, 'medical_assistants_not_licensed', 'Medical Assistants - Not Licensed', 'medical'),
(101, 'other_providers_not_listed', 'Other Providers Not Listed Above', 'other_programs_and_services')
```

2. Create a new Transformer (in order above the one that create relevant\_providers) called "relevant\_oshpd\_provider\_mapping" (see SQL in appendix)
3. Add the column "staff\_member\_type\_id" to the relevant\_providers Transformer (see the SQL in the Appendix, below)
4. Add "staff\_member\_id" to the relevant\_providers Transformer and Data Element (see SQL in the Appendix, below)
5. Enable the Data Element "Staff Members" (see SQL in Appendix)
6. Enable the Data Element "Staff Member FTE Segments" (see SQL in Appendix)
7. If you have any custom payers entered, you may have to update the SQL somewhat in the report "Patient Coverage and Episodic Programs" to map those (in the CASE statement)

## eCW-Specific Instructions

1. If you find providers with unmapped provider categories in "Encounters by Provider / Contacts by Staff", you may have to update their record in eCW. By default, the report relies on a dummy field, which is the "Social Security No" field on the provider or staff administrative record in eCW. The number that goes into this field matches the line number on the tables of "Report Page 2."
2. Make sure all insurances have the "Managed Care Plan ID" field on the "Address" tab completed with one of the numerical values listed in the first TEMPORARY TABLE of the SQL code (named "explanation") of the report "Patient Coverage and Episodic Programs."

## Nextgen-Specific instructions

You will need to map your providers to the provider types, and your insurances to the insurance categories, listed in the HCAi guidance. If these categories are not stored directly in Nextgen, this may require providing a list of providers with their HCAi provider type (Relevant can supply a template for this).

## Appendix

### SQL Code for eCW Transformer: relevant\_oshpd\_provider\_mapping

```
DROP TABLE IF EXISTS relevant_oshpd_provider_mapping;
CREATE TABLE relevant_oshpd_provider_mapping AS
  SELECT DISTINCT uid AS User_ID,
                 ulname AS Last_Name,
                 ufname AS First_Name,
                 CASE
                   WHEN usertype = 1
                     THEN 'Provider'
                   WHEN usertype = 2
                     THEN 'Staff'
                   WHEN usertype = 9
                     THEN 'Resource'
                   ELSE 'Error' END AS User_type,
                 COALESCE(CASE
                   WHEN usertype = 1
                     THEN ssn
                   WHEN usertype = 2
                     THEN ssn
                   WHEN usertype = 9
                     THEN providercode
                   ELSE 'error' END, '0') AS oshpd_line
  FROM users
    LEFT JOIN enc ON users.uid = enc.resourceid
    LEFT JOIN doctors ON users.uid = doctors.doctorid
  WHERE (usertype = 1 OR usertype = 2 OR usertype = 9)
    AND encounterid IS NOT NULL
    AND (enctype = 1 OR enctype = 3);
CREATE INDEX oshpd_line_relevant_oshpd_provider_mapping_index
  ON relevant_oshpd_provider_mapping (oshpd_line);
CREATE INDEX User_ID_relevant_oshpd_provider_mapping_index
  ON relevant_oshpd_provider_mapping (User_ID);
```

### Adding staff\_member\_type\_id to the Transformer relevant\_providers (eCW)

If you haven't already, add the following JOIN:

```
LEFT JOIN relevant_oshpd_provider_mapping oshpd ON oshpd.user_id = users.uid
```

Then, add the following to the SELECT clause (add a comma to the last existing line, and paste this below):

```
CASE
  WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%Family%' THEN 1
  WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%Internal%' THEN 3
    -- Physicians to Pediatricians
  WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%Pediatrics%' THEN 5
    -- Physicians to OB/GYN
  WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%OB%' THEN 4
    -- Default to General practitioners
  WHEN oshpd.oshpd_line = '75' THEN 2
    -- PA
  WHEN oshpd.oshpd_line = '76' THEN 9
    -- FNP
  WHEN oshpd.oshpd_line = '77' THEN 8
    -- CNM
  WHEN oshpd.oshpd_line = '78' THEN 10
    -- Dentist
  WHEN oshpd.oshpd_line = '80' THEN 16
    -- Psychiatrist
  WHEN oshpd.oshpd_line = '82' THEN 20
    -- Clinical Psychologist
  WHEN oshpd.oshpd_line = '83' THEN 21
    -- LCSW
  WHEN oshpd.oshpd_line = '84' THEN 22
    -- Other Providers Billable to Medi-Cal to Other
Professional Services
  WHEN oshpd.oshpd_line = '85' THEN 26
    -- RN
  WHEN oshpd.oshpd_line = '94' THEN 11
    -- Non-Licensed Patient Education Staff to
Patient/Community Education Specialists
  WHEN oshpd.oshpd_line = '97' THEN 32
    -- Substance Abuse Counselors to Substance Use
Disorder Services
  WHEN oshpd.oshpd_line = '98' THEN 25
    -- Billing Staff to Fiscal and Billing Staff
  WHEN oshpd.oshpd_line = '99' THEN 42
    -- Other Administrative Staff to Management and
Support Staff
  WHEN oshpd.oshpd_line = '100' THEN 41
    -- new categories for OSHPD (see Staff Member Types
Importer)
  WHEN oshpd.oshpd_line IN ('79', '81', '86', '90', '91', '92', '93',
'95', '96', '101')
  THEN oshpd.oshpd_line :: INT
    -- Default to Other Providers Not Listed Above
ELSE 101
END AS staff_member_type_id
```

Finally, add the following line to the end of the SELECT in the section UNIONed below for provider id 999999:

```
101          AS staff_member_type_id
```

Run the Transformer again to make sure it works, and then add the “staff\_member\_type\_id” to the Providers Data Element and make sure it runs.

## Adding staff\_member\_id to the Transformer relevant\_providers (eCW)

Add this line to the SELECT statement of the relevant\_providers Transformer, after “staff\_member\_type\_id”:

```
users.uid          AS staff_member_id
```

Then add the field name (staff\_member\_id) to the Providers Data Element. Make sure both run.

## SQL for New Staff Members Data Element (eCW and Nextgen)

```
SELECT staff_member_id AS id,  
       first_name,  
       last_name  
FROM relevant_providers
```

## SQL for New Staff Member FTE Segments Data Element (eCW and Nextgen)

```
SELECT id,  
       staff_member_id,  
       staff_member_type_id,  
       -- change this if you've imported FTEs, segments  
       0 :: DECIMAL          AS ftes,  
       '2019-01-01' :: DATE AS started_on,  
       NULL :: DATE         AS ended_on  
FROM relevant_providers
```