



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Clinical Reporting System (CRS) For FY 2008 Clinical Measures (BGP)

User Manual Patch 2 Addendum

Version 8.0 Patch 2
August 2008

Office of Information Technology (OIT)
Division of Information Resource Management
Albuquerque, New Mexico

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1.0 Introduction

Please review these changes and add a copy of them to any printed documentation your site may be using for the Clinical Reporting System version 8.0. These changes will be integrated into future versions of the software and user manuals and will no longer be considered an addendum at the time of the next release.

Patch 2 of the Clinical Reporting System version 8.0 contains the changes listed below. Changes to logic are described in the document *CRS 2008 v.8.0 Patch 2 Selected Measures Report Performance Measures Definitions and Logic*.

- **New Executive Order (EO) Quality Transparency Measures Report:** Added this new report that is needed to meet the Federal mandates of transparency of quality measurement report as per Executive Order 13410. This report includes a hard-coded option that uses preset report parameters that are the same as the National GPRA Report (e.g. report period is hard coded to July 1, 2007 – June 30, 2008) and a user-defined option where the user provides all report parameters.
- **Other National Measures Report:** (1) Added functionality for user to run the hard-coded report or the user-defined report. The hard-coded option uses preset report parameters that are the same as the National GPRA Report (e.g. report period is hard coded to July 1, 2007 – June 30, 2008) and a user-defined option where the user provides all report parameters. (2) Added the Tobacco Cessation topic to this report that includes new, developmental GPRA logic. This logic is more effective at identifying a current tobacco user and will be analyzed and may become the GPRA logic for 2009 reporting. (3) Added third export file that is produced when the Area ONM Report is run.
- **New functionality for excluding demo/test patients from all CRS reports:** (1) Added option for creating and editing a search template of demo/test patients. (2) Added site parameter for excluding from all CRS reports demo/test patients that are included in the specified demo/test patients search template.
- **Comprehensive National GPRA Export for 2007-2008:** Updated CRS 2007 Version 7.0 (not CRS 2008 Version 8.0), National GPRA Reports menu by adding ,menu option “XP8” that will be used for creating a comprehensive export of National GPRA Report data for GPRA years 2007 and 2008. This data will be based on logic contained in CRS 2007 Version 7.0. This data is in support of the quality improvement initiative IHS is participating in along with colleagues from Harvard Medical School.
- **Updated CRS Graphical User Interface:** The GUI contains all functionality included in CRS 2008 Version 8.0, including the updated CRS 2007 Version 7.0 for the Comprehensive National GPRA Export for 2007-2008.

2.0 Patch 2

Patch 2 changes listed in the previous section are described in detail in the sections below.

2.1 Change 1

In the Executive Order (EO) Quality Transparency Measures Report: The performance measures are in support of Executive Order 13410 for quality transparency reporting. All Federal facilities/sites are required to run this report and will report their data annually and the information will be available on the new IHS Quality of Care web site. Users have the option of running the report using the same hard-coded report parameters as the National GPRA Report or selecting a user-defined option where the user provides all report parameters, as shown below.

```
IHS Executive Order Quality Transparency Measures Report

Please select the type of report would you like to run:

H   Hard-coded Report:  Report with all parameters set to the same as the
    National GPRA Report (report period of July 1, 2007 - June 30, 2008,
    baseline period of July 1, 1999 - June 30, 2008, and AI/AN patients
    only)

U   User-defined Report:  You select the report and baseline periods and
    beneficiary population

Select a Report Option: H://
```

1. If the user selects the hard-coded report, the following steps will occur.
 - a. Information about the report will be displayed. User will be required to press Enter to continue.
 - b. System will check to see if all taxonomies required for this report are present and have members associated to them. CRS should only check for the taxonomies needed for performance measures included in this report, not for all taxonomies. For example, the system should not check for taxonomy BGP CD4 TAX since the HIV Quality of Care performance measure is not included in the Other National Measures Report.
 - c. All performance measures.
 - d. Current Report date range of July 1 – June 30.
 - e. Current Report calendar year end date of 2008.
 - f. Baseline calendar year of 2000.
 - g. Beneficiary Population of AI/AN only.

- h. Select Community taxonomy (default Community taxonomy can be set in Site Parameters).
 - i. The software will check the names of the communities included in the Community taxonomy against the Standard Code Table for Community. If any of the communities are not found in the standard table, the following warning message will be displayed:

“Community [Community Name] was not found in the Community table. There may be patients who have been reassigned from this community to a new community and this could reduce your patient population. Do you want to cancel the report and review the communities? Type “Y” to cancel or “N” to continue.”
 - j. Select patient list option (Yes/No). If No, skip to step n.
 - k. If Yes, select from the EO Quality Transparency Measure Lists of Patients Selection Screen (see section 3.2.2.3.4.3), one or more performance measure topics for which patient list will be printed. User types Q Quit when patient list selection is complete.
 - l. Select the patient list Type.
 - R Random
 - P By Provider
 - A All Patients
 - m. If By Provider was selected, enter Provider name.
 - n. Select Area Export option (Yes or No). **NOTE:** This option is only available if user is running the report for all EO Quality Transparency measures.
 - o. Select Output (Print, Delimited, or Both) and output device.
2. If the user selects the user-defined report, the following steps will occur.
- a. Information about the Executive Order Quality Transparency Measures Report will be displayed. User will be required to press Enter to continue.

Executive Order Quality Transparency Measures Report

This will produce an Executive Order Quality Transparency Measures Report for all performance measures for a year period you specify. You will be asked to provide: 1) the measures for the report, 2) the reporting period, 3) the baseline period to compare data to, 3) the community taxonomy to determine which patients will be included, and the 4) the patient population (i.e. AI/AN only, non AI/AN, or both) to determine which patients will be included.

If you choose to run the report for all measures, you will be given the opportunity to export this data to the Area office. If you answer yes, this option will produce a report in export format for the Area Office to use in Area aggregated data. Depending on site specific configuration, the export file will either be automatically transmitted directly to the Area or the site will have to send the file manually.

There are 7 measures in the Executive Order Quality Transparency Measures Report.

Select one of the following:

S	Selected set of Measures
A	All Measures

Run the report on: S//

- b. Select to run the report for all measures or for selected measures.
- c. System will check to see if all taxonomies required for this report are present and have members associated to them. CRS should only check for the taxonomies needed for measures included in this report, not for all taxonomies. For example, the system should not check for taxonomy BGP CD4 TAX since the HIV Quality of Care measure is not included in this report.
- d. Select the date range for the report by following steps i or ii below.

Select one of the following:

1	January 1 - December 31
2	April 1 - March 31
3	July 1 - June 30
4	October 1 - September 30
5	User-Defined Report Period

Enter the date range for your report:

- i. To select a pre-defined period (e.g. January 1 – December 31):
 1. Select one of the first four options.
 2. Enter the calendar year of the report end date (e.g. 2005).
- ii. To enter your own report end date:
 1. Select option 5, User-Defined Report Period.

2. Enter the end date of the report in MM/DD/CCYY format (e.g. 11/30/2004).
- e. Select Baseline calendar year.
- f. Select Community taxonomy (default Community taxonomy can be set in Site Parameters).
- g. The software will check the names of the communities included in the Community taxonomy against the Standard Code Table for Community. If any of the communities are not found in the standard table, the following warning message will be displayed:

“Community [Community Name] was not found in the Community table. There may be patients who have been reassigned from this community to a new community and this could reduce your patient population. Do you want to cancel the report and review the communities? Type “Y” to cancel or “N” to continue.”
- h. Select patient list option (Yes/No). If No, skip to step l.
- i. If Yes, select from the EO Quality Transparency Measure Lists of Patients Selection Screen (see section 3.2.2.3.4.3), one or more performance measure topics for which patient list will be printed. User types Q Quit when patient list selection is complete.
- j. Select the patient list Type.
 - R Random
 - P By Provider
 - A All Patients
- k. If By Provider was selected, enter Provider name.
- l. Select Beneficiary population (options are 01 Indian/Alaska Native (default); Not 01; or All).
- m. Select Area Export option (Yes or No). **NOTE:** This option is only available if user is running the report for all EO Quality Transparency measures.
- n. Select Output (Print, Delimited, or Both) and output device.

2.2 Change 2

In the Other National Measures Report: Users have the option of running the report using the same hard-coded report parameters as the National GPRA Report or selecting their own report parameters, as shown below.

IHS Other National Measures Report

Please select the type of report would you like to run:

H Hard-coded Report: Report with all parameters set to the same as the National GPRA Report (report period of July 1, 2007 - June 30, 2008, baseline period of July 1, 1999 - June 30, 2008, and AI/AN patients only)

U User-defined Report: You select the report and baseline periods and beneficiary population

Select a Report Option: H://

1. If the user selects the hard-coded report, the following steps will occur.
 - a. Information about the report will be displayed. User will be required to press Enter to continue.

IHS 2008 Other National Measures Report

This will produce an Other National Measures report. You will be asked to provide the community taxonomy to determine which patients will be included. This report will be run for the Report Period July 1, 2007 through June 30, 2008 with a Baseline Year of July 1, 1999 through June 30, 2000. This report will include beneficiary population of American Indian/Alaska Native only.

You can choose to export this data to the Area office. If you answer yes at the export prompt, a report will be produced in export format for the Area Office to use in Area aggregated data. Depending on site specific configuration, the export file will either be automatically transmitted directly to the Area or the site will have to send the file manually.

- b. System will check to see if all taxonomies required for this report are present and have members associated to them. CRS should only check for the taxonomies needed for performance measures included in this report, not for all taxonomies. For example, the system should not check for taxonomy BGP CD4 TAX since the HIV Quality of Care performance measure is not included in the Other National Measures Report.
- c. Current Report date range of July 1 – June 30.
- d. Current Report calendar year end date of 2008.
- e. Baseline calendar year of 2000.
- f. Display site's home location.
- g. Beneficiary Population of AI/AN only.
- h. Select Community taxonomy (default Community taxonomy can be set in Site Parameters).
- i. The software will check the names of the communities included in the Community taxonomy against the Standard Code Table for Community. If any of

the communities are not found in the standard table, the following warning message will be displayed:

“Community [Community Name] was not found in the Community table. There may be patients who have been reassigned from this community to a new community and this could reduce your patient population. Do you want to cancel the report and review the communities? Type “Y” to cancel or “N” to continue.”

- j. Select Area Export option (Yes or No). If the Height and Weight site parameter is set to “Y”, if the user chooses to export the National GPRA data to the Area Office, the height and weight data will automatically be included in the BG08 file that is for the Area Office.
 - k. Select Output (Print, Delimited, or Both) and output device.
2. If the user selects the user-defined report, the following steps will occur.
- a. Information about the Other National Measures Report will be displayed. User will be required to press Enter to continue.

IHS Other National Measures Report

This will produce the Other National Measures (ONM) Report for all ONM performance measures for a year period you specify. You will be asked to provide: 1) the reporting period, 2) the baseline period to compare data to, 3) the community taxonomy to determine which patients will be included, and the 4) beneficiary population.

You will be given the opportunity to export this data to the Area office. If you answer yes, this option will produce a report in export format for the Area Office to use in Area aggregated data. Depending on site specific configuration, the export file will either be automatically transmitted directly to the Area or the site will have to send the file manually.

- b. The site-defined taxonomies needed to run the report will be checked.
- c. Select the date range for the report by following steps i or ii below.

Select one of the following:

- 1 January 1 - December 31
- 2 April 1 - March 31
- 3 July 1 - June 30
- 4 October 1 - September 30
- 5 User-Defined Report Period

Enter the date range for your report:

- i. To select a pre-defined period (e.g. January 1 – December 31):
 - 1. Select one of the first four options.
 - 2. Enter the calendar year of the report end date (e.g. 2005).
- ii. To select your own report end date:
 - 1. Select option 5, User-Defined Report Period.

2. Enter the end date of the report in MM/DD/CCYY format (e.g. 11/30/2004).
- d. Type the baseline year at the “Enter Year:” prompt.
- e. Select Community taxonomy (default Community taxonomy can be set in Site Parameters).
- f. The software will check the names of the communities included in the Community taxonomy against the Standard Code Table for Community. If any of the communities are not found in the standard table, the following warning message will be displayed.

“Community [Community Name] was not found in the Community table. There may be patients who have been reassigned from this community to a new community and this could reduce your patient population. Do you want to cancel the report and review the communities? Type “Y” to cancel or “N” to continue.”
- g. Select Beneficiary population (options are 01 Indian/Alaska Native (default); Not 01; or All).
- h. Select Area Export option (Yes or No).
- i. If user selects Yes for Area Export option, the program will automatically create a file for use by the Area Office to create the Area Aggregate Other National Measures Report.
- j. Select Output (Print, Delimited, or Both) and output device.

2.3 Change 3

In the SET System Setup Menu: New functionality for excluding demo/test patients from all CRS reports. Users will select this menu option to set up and use all site parameters and taxonomies needed for the CRS 2008 program before running any reports.

```

*****
**      IHS/RPMS CRS 2008      **
**  Clinical Reporting System  **
*****
          Version 8.0, Patch 2

          DEMO INDIAN HOSPITAL

RPT  Reports ...
SET  System Setup ...
AO   Area Options ...

Select CRS 2008 Option:

```

DP Update the Demo/Test Patient Search Template (new for v.8.0 Patch 2)

The following steps will occur when a user selects this menu option.

```

*****
**   IHS/RPMS CRS 2008   **
**     Setup Menu     **
*****
Version 8.0, Patch 2

DEMO INDIAN HOSPITAL

SP   Site Parameters
TC   Taxonomy Check ...
TS   Taxonomy Setup ...
DP   Update the Demo/Test Patient Search Template

Select System Setup Option:

```

1. Information screen is displayed. User presses Enter to continue.
2. User enters name of the search template to create or edit.
3. Display screen that lists all patients that have been selected for inclusion in the search template and where user can add and/or remove patients.

SP Site Parameters (changed from v.8.0 Patch 1)

The following steps will occur when a user selects this menu option.

```

*****
**   IHS/RPMS CRS 2008   **
**     Setup Menu     **
*****
Version 8.0, Patch 2

DEMO INDIAN HOSPITAL

SP   Site Parameters
TC   Taxonomy Check ...
TS   Taxonomy Setup ...
DP   Update the Demo/Test Patient Search Template

Select System Setup Option:

```

1. Select the name of the site location.
2. Select the name of the default community taxonomy.
3. Select name of the Home location for PHN home visits.
4. Choose whether or not to export Height and Weight Data. All federal and urban sites should enter Y.
5. Choose whether the site is a CHS-only site.
6. Choose whether the site is an MFI site. NOTE: This step is only displayed for sites within the Alaska Area.
7. Choose whether to select a search template that will be used to identify the facility's demo/test patients that will be excluded from all CRS reports except the Selected Measures (Local) Patient Panel Report.
8. The "Select BGP Site Parameters Location:" prompt displays again. Press the Enter key to return to the System Setup menu.

2.4 Change 4

In the Comprehensive National GPRA Export for 2007-2008: The files are created when the facility runs the Comprehensive National GPRA Export option included in CRS Version 7.0 Patch 2 and begin with “CRSCNT.” They are used by IHS to identify high performing regional areas to facilitate sharing of “best practices” to improve care throughout the IHS; highlight areas of outstanding patient care to support advocacy for increased federal funding to support these and future efforts; and provide local sites with data extracts that will allow self-evaluation and development of local interventions. The process to export these files is shown below.

1. At the IHS/RPMS Clinical Reporting System menu, select **CI07** (CRS 2007).

```

*****
**      IHS/RPMS CLINICAL REPORTING SYSTEM (CRS)      **
*****
                          Version 7.0 (patch 2)

                          DEMO INDIAN HOSPITAL

CI08  CRS 2008 ...
CI07  CRS 2007 ...
CI06  CRS 2006 ...
CI05  CRS 2005 ...
GP04  GPRA+ FY04 ...
GP03  GPRA+ FY03 ...
GP02  GPRA+ FY02 ...

There is PRIORITY Mail!

Select IHS Clinical Reporting System (CRS) Main Menu Option:

```

2. At the CRS Reports Menu, select **RPT** (Reports).

```

*****
**      IHS/RPMS CRS 2007      **
**      Clinical Reporting System      **
*****
                          Version 7.0 (patch 2)

                          DEMO INDIAN HOSPITAL

RPT   Reports ...
SET   System Setup ...
AO    Area Options ...

Select CRS 2007 Option:

```

3. At the Reports Menu, select **NTL** (National GPRA Reports).

```

*****
**   IHS/RPMS CRS 2007   **
**   Reports Menu       **
*****
Version 7.0 (patch 2)

DEMO INDIAN HOSPITAL

NTL   National GPRA Reports ...
LOC   Reports for Local Use: IHS Clinical Measures ...
OTH   Other National Reports ...
TAX   Taxonomy Reports ...

Select Reports Option:
    
```

4. Type **XP8** at the “Select National GPRA Reports Option:” prompt.

```

*****
**   IHS/RPMS CRS 2007   **
**   National GPRA Reports   **
*****
Version 7.0 (patch 2)

DEMO INDIAN HOSPITAL

GP    National GPRA Report
XP    Comprehensive National GPRA Export
XP8   Comprehensive National GPRA Export for 2007-2008
CMP   Comprehensive National GPRA Patient List
LST   National GPRA Report Patient List
NST   Create Search Template for National Patient List
GP8   National GPRA Report for GPRA Year 2008

Select National GPRA Reports Option:
    
```

5. Information about the export file is displayed. Press **ENTER** to continue

Comprehensive National GPRA Export

This option will produce an export file containing comprehensive National GPRA data for all patients included in your facility's National GPRA Report for GPRA years 2007-2008 (i.e. Jul 01, 2006 through Jun 30, 2008). A single delimited file beginning with "CRSCNT" will be created that you will need to be exported to NPIRS. You will be given separate instructions for exporting the file.

This data will be analyzed by IHS with the following goals:

- Identify high performing regional areas to facilitate sharing of "best practices" to improve care throughout the IHS.
- Highlight areas of outstanding patient care to support advocacy for increased federal funding to support these and future efforts.
- Provide local sites with data extracts that will allow self-evaluation and development of local interventions.

If you would like to use this data in Excel for your own research, depending on the size of your database, you may need to split the files

Press enter to continue:

6. Press **ENTER** to continue

into multiple files so the data will not be truncated in Excel. If you choose to create the local files, the filenames will begin with "CRSLCNT".

Press enter to continue:

7. The taxonomies are checked. If the message "The following taxonomies are missing or have no entries:" displays, your report results for the measure that uses the taxonomy specified are likely to be inaccurate. To exit from the report to edit your taxonomies, type a caret (^) (Shift-6) at any prompt until you return to the main menu.

"If the message All taxonomies are present. End of taxonomy check. Press ENTER:" displays press **ENTER**.

Checking for Taxonomies to support the National GPRA Report...

All taxonomies are present.

End of taxonomy check. PRESS ENTER:

8. Type the name of your community taxonomy or press **ENTER** to accept the default taxonomy if it is the taxonomy used for GPRA reporting purposes. (If you don't know the community taxonomy, type two question marks (??) to see the entire list; for GPRA reporting purposes, the community should be the same as the site CHSDA, except in Oklahoma.).

9. Type **Y** at the "Do you wish to create the export file for NPIRS?" prompt.

NOTE: The facilities should not answer yes to the export to NPIRS prompt unless they have been directed by their Area Office to do so. If your facility automatically

transmits files to the Area Office, notify your Area GPRA Coordinator that the file was sent since the file may be very large.

```

Checking for Taxonomies to support the National GPRA Report...

All taxonomies are present.

End of taxonomy check.  PRESS ENTER:

The date ranges for this report are: Jul 01, 2006 to Jun 30, 2008

Specify the community taxonomy to determine which patients will be
included in the report.  You should have created this taxonomy using QMAN.

Enter the Name of the Community Taxonomy: DEMO GPRA COMMUNITIES//
Do you wish to create the export file for NPIRS?

```

10. Type Y or N at the “Do you want to create local delimited files for use in Excel?” prompt.

NOTE: You should only choose this option if you want to use these files for your own research, as it will create local delimited files that may be very large. Refer to the CRS 2007 User Manual; Section 5.2.2 for a list of the data elements included the file and definitions of the values in the file.

11. A summary of the export file will display, showing the pre-defined date range, selected community taxonomy name, and the name of the NPIRS file. If any of this information is incorrect, type a caret (^) (Shift-6) to return to a previous menu.

```

SUMMARY OF NATIONAL GPRA EXPORT FILE TO BE GENERATED

The date ranges for this report are: Jul 01, 2006 to Jun 30, 2008

The COMMUNITY Taxonomy to be used is: DEMO GPRA COMMUNITIES
The NPIRS Export file will be named:
CRSCNT505901200607012008063020080710105009_001_of_001.TXT
and will reside in the q:\ directory.  This is the file you should
export to NPIRS.

DEVICE: HOME//

```

12. Write down on a piece of paper the name of the NPIRS file and the directory to which it will be written. The yellow highlighting on the screen below shows where this information will be included. Please note that the information will be different for your facility and you need to write down the name for your file and your directory.

SUMMARY OF NATIONAL GPRA EXPORT FILE TO BE GENERATED

The date ranges for this report are: Jul 01, 2006 to Jun 30, 2008

The COMMUNITY Taxonomy to be used is: DEMO GPRA COMMUNITIES

The NPIRS Export file will be named:

CRSCNT505901200607012008063020080709133546_001_of_001.TXT

and will reside in the q:\ directory. This is the file you should export to NPIRS.

DEVICE: HOME// qEUEE TO PRINT ON

DEVICE: HOME// hfs LOCAL

HOST FILE NAME: Q:\PUB\TMP.TEHR//

13. At the "Device: Home//" prompt, type **Q** to queue the file and press enter.
14. At the next "Device: Home//" prompt, type **HFS** to print to a file and press enter.
15. At the "Host File Name:" prompt, **type a name for the cover page file** that will be created that shows the parameters for the export file and the names of the NPIRS and local files that were created and press enter.

SUMMARY OF NATIONAL GPRA EXPORT FILE TO BE GENERATED

The date ranges for this report are: Jul 01, 2006 to Jun 30, 2008

The COMMUNITY Taxonomy to be used is: DEMO GPRA COMMUNITIES

The NPIRS Export file will be named:

CRSCNT505901200607012008063020080710123943_001_of_001.TXT

and will reside in the q:\ directory. This is the file you should export to NPIRS.

DEVICE: HOME// qQUEUE TO PRINT ON

DEVICE: HOME// hfs LOCAL

HOST FILE NAME: Q:\PUB\TMP.TEHR//[yourfilename] ADDRESS/PARAMETERS: "WNS"//

16. At the "Address/Parameters:" prompt, press enter.
17. At the "Requested Start Time:" prompt, press Enter to run the report now or enter the time to run it. **Since this file may be very large, you should queue it to run at night or on the weekend.**

SUMMARY OF NATIONAL GPRA EXPORT FILE TO BE GENERATED

The date ranges for this report are: Jul 01, 2006 to Jun 30, 2008

The COMMUNITY Taxonomy to be used is: DEMO GPRA COMMUNITIES

The NPIRS Export file will be named:

CRSCNT505901200607012008063020080710123943_001_of_001.TXT

and will reside in the q:\ directory. This is the file you should export to NPIRS.

DEVICE: HOME// qQUEUE TO PRINT ON

DEVICE: HOME// hfs LOCAL

HOST FILE NAME: Q:\PUB\TMP.TEHR//[yourfilename] ADDRESS/PARAMETERS: "WNS"//

Requested Start Time: NOW//

2.5 Change 5

Updated CRS Graphical User Interface: The GUI now contains all functionality included in CRS 2008 Version 8.0, including the updated CRS 2007 Version 7.0 for the Comprehensive National GPRA Export for 2007-2008.

3.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT User Support by:

Phone: (505) 248-4371 or
(888) 830-7280

Fax: (505) 248-4297

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: support@ihs.gov