

Distributed Query Tool

Sample Investigator Manual

Powered by PopMedNet™

Based on release 2.2

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The PopMedNet™ application was developed under from the Agency for Healthcare Research and Quality, US Department of Health and Human Services as part of the Developing Evidence to Inform Decisions about Effectiveness (DEcIDE) program, awarded to the DEcIDE centers at the HMO Research Network Center for Education and Research on Therapeutics (HMORN CERT) and the University of Pennsylvania. The Food and Drug Administration's Mini-Sentinel project provided additional support.

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Appendix A: Quick Reference for Investigators

Appendix B: Query Administrator Role

1 Introduction

The **PopMedNet™** software application enables simple, efficient creation and use of distributed data networks, through a set of tools and web-based services. It is optimized to facilitate distributed analyses of medical product safety, comparative effectiveness, quality, medical resource utilization, cost-effectiveness, and related studies. The system provides secure, customized private portals, query tools, and file transfer capabilities. It supports both menu driven queries and distributed analyses using complex, single use or multi-use programs designed to execute against a local data resource.

Data partners exercise full control over the files they make available for querying, the results returned to requestors, and the individuals who are permitted to submit queries.

This [SAMPLE Investigator Manual](#) describes the main features and functions for Investigators participating in a health data network powered by PopMedNet™ software. Investigators will primarily interact with the PopMedNet™ network through a secure web-based portal as described below. This sample document is based on the FDA Mini-Sentinel Network's implementation of the PopMedNet™ system, including the query types available for Mini-Sentinel. Different networks will have different types of queries and capabilities. PopMedNet™ software can customize and brand the network as desired.

The Department of Population Medicine at the Harvard Pilgrim Health Care Institute (HPHCI) led development of the system in collaboration with Lincoln Peak Partners (LPP). Lincoln Peak Partners provides support services and secure hosting for current system users, and leads development of system enhancements.

2 System Overview

The Distributed Query Tool software is comprised of two separate applications, the web-based **Portal** and the **DataMart Client**. There is one Portal in the network and each data partner has one or more "DataMarts". The Portal is the starting point for all information requests and controls all system communications, security, and governance policies. Data Partners receive queries, process them, and securely return them to the Portal via their locally installed DataMart Client software application. Each Data Partner will have at least one DataMart; multiple DataMarts per Data Partner are possible. Each DataMart can contain different types of data and DataMarts can have different query processing settings. All query requests and communications within the network are securely routed from the Portal to the DataMarts and then back to the Portal.

Note: The term **DataMart** is used in an information technology context referring to the place where the data are held for querying. Use of this term does not imply that data partner information is being sold or being made broadly available; Data Partners maintain control of all their data and all uses.

Browser Requirements

The Portal is designed to work with Internet Explorer (IE) 7 or later. Earlier versions of IE may not display the user interface properly. Although IE7 is the only officially supported browser, other browsers such as Firefox and Chrome may also work; Firefox has been used extensively in testing.

The DataMart Client Application

The DataMart Client application allows the DataMart Administrator to view queries distributed to the DataMart, execute queries locally, review the results, and upload the results to the portal. The DataMart Client is a .NET/C# Windows desktop application that is installed locally on one or more data partner computers. All communications between the DataMart Client application and the Portal use HTTP/SSL connections to securely transfer queries and results between the application and the Portal. The application uses ODBC connections to the local DataMart databases used to process queries and generate results.

Audience

This manual is intended for PopMedNet™ Investigators who want to:

- Get started accessing the Distributed Query Tool
- Submit a query to the available DataMarts
- Monitor status of a query
- Review results of a query

Investigator Roles

Roles determine the rights that individual users have when using the Portal. There are three Investigator roles available within the system.

Investigator: can submit queries to DataMarts that have given them or their organization permission to submit queries and view only aggregated query results.

Enhanced Investigator: can submit queries to DataMarts that have given them or their organization permission to submit queries and review their query results. This role has the additional right to view disaggregated (site-specific) results.

Query Administrator: can approve queries before they are sent to DataMarts. This user has the rights of an Enhanced Investigator for sending and reviewing queries.

Related Documents

For more information about the PopMedNet™ system, see one of the following documents available on the PopMedNet™ public website (popmednet.org):

PopMedNet™ Distributed Query Tool Sample DataMart Administrator Manual

The *DataMart Administrator Manual* describes the tasks and activities required to install and manage a DataMart. This includes:

- Setting up and configuring the physical environment -- consisting of Internet connectivity/desktop computer requirements, and system software
- Installing and performing initial administrative setup of a DataMart Client
- Managing the DataMart setting in the portal

PopMedNet™ Distributed Query Tool Network Administrator Manual

The *Network Administrator Manual* describes the tasks and activities required to install and manage the portal. This includes:

- Installing an instance of a Portal and an associated database
- Performing the initial administrative setup
- Performing typical System Administrator functions such as adding new users and DataMarts, creating new roles, and deleting users and DataMarts

PopMedNet™ Distributed Query Tool Overview and Technical Documentation

The *Overview and Technical Documentation* described the overall network system architecture, key querying features, and hosting and security details. This includes:

- System overview and workflow
- Policies and features
- Technical architecture and security

3 How to Login to the Web Portal

Before you can login to your Distributed Query Tool portal, you need a username and password assigned by your Network Administrator or the PopMedNet™ support staff. Once you have your Login Credentials, follow the steps below.



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Version: 2.2.2

INSTRUCTIONS: Please complete the form below and read the Terms and Conditions before using the Query Tool.

Username:

Password:

[Forgot Password?](#)

☐ I agree to the [Terms and Conditions](#) of use.

Login

Use these steps to login to the portal:

1. Navigate to the PopMedNet™ custom website login page:
[Secure URL distributed by network coordinating center.]
2. Enter your Username and Password in the boxes.
3. If this is your first login, you will be prompted to read and acknowledge your agreement to the Terms and Conditions of use. If you have cookies enabled, you will not be prompted on subsequent logins.
4. Click the Login button to enter the Portal.

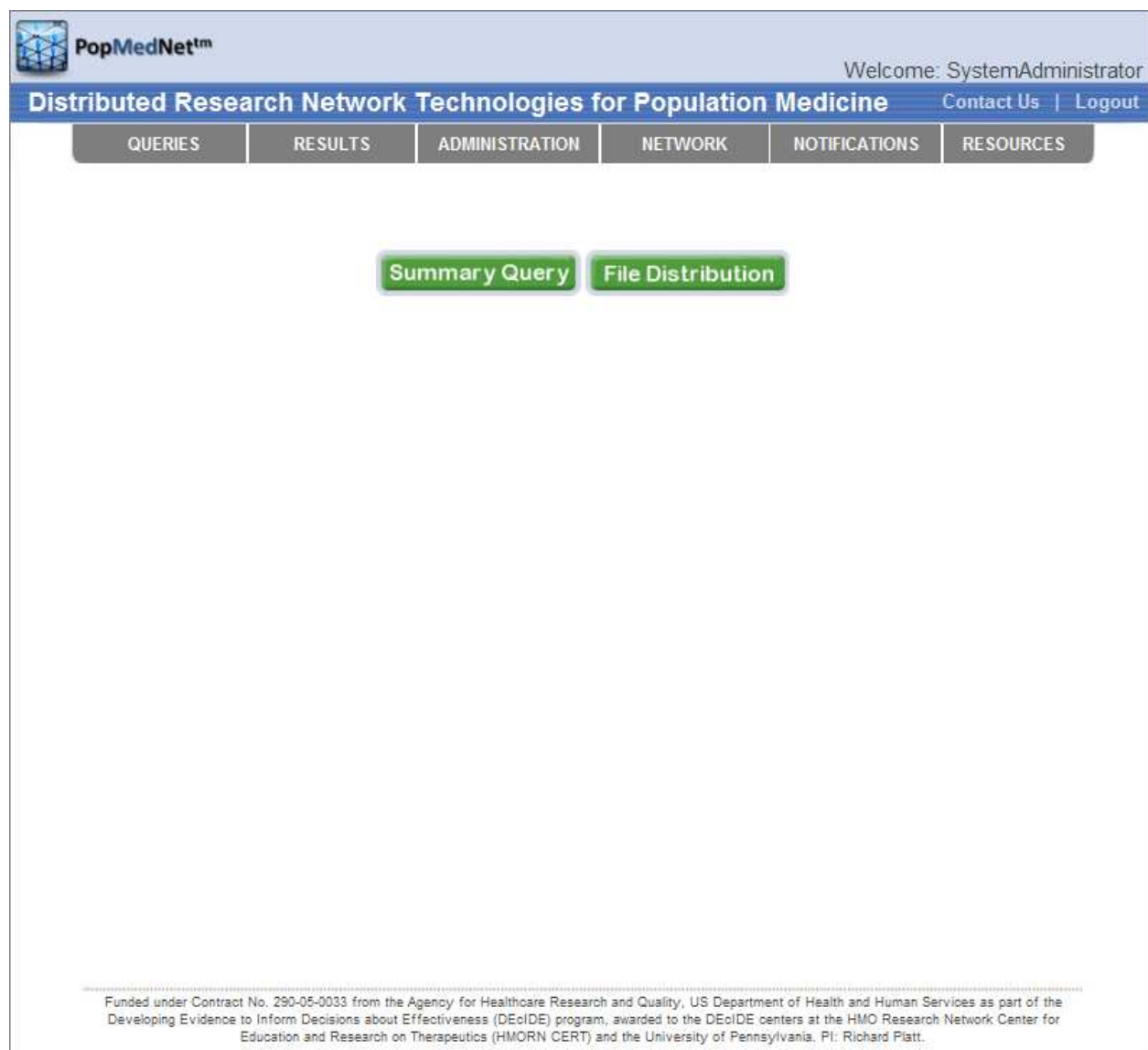
4 Submitting a Query, Viewing Query Status, and Viewing Results

Once you have logged in, the portal displays the home page shown below. From the home page, you can create a query or you can set up file distribution. This section tells you how to create a query, view the status of a query, and view the results. For information on file distribution, see section 4.4.

Note: *The descriptions below refer to a specific implementation using the PopMedNet™ software. Installations for other PopMedNet™- powered networks may have different query capabilities.*

4.1 Getting Started

Click the Summary Query button to begin creating your query.



4.2 Submitting a Query

The Queries page allows you to create menu-driven queries. There are nine query types. The criteria that you can enter vary for each type. However, the basic steps are the same for all queries. Once you select a query type, the page shows numbered steps that lead you through the required input fields.

Procedure

Follow these basic steps to submit a query:

1. Choose the query category from the drop down menu. (Note: In version 2.2 of the query tool only Prevalence query types are available for querying.)
2. Choose a query type from the drop down menu.
3. Enter a unique name for the query in the text box. This name should help you distinguish among your queries. Note that this field only appears after you select the query type.
4. Enter a brief description of the query and the reason for submitting this query, for example to assess the utilization of a medical product. This description is distributed along with the query and should be detailed enough to allow data partners to assess the reason for the query.
Note: This step also displays your email address. To update your email address, please contact the Network Administrator. You must use a business email address, not a personal account.
5. Follow the numbered steps on the screen to enter criteria for each query type.
6. The available DataMarts will not appear until after at least one year is selected; once the year is selected, click on the Display DataMarts button to identify DataMarts available for querying.
7. Click the Start This Query button to submit the query. The query goes out to all the DataMarts that you have selected.

4.3 Query Types

The sections that follow describe the information to enter for each of the currently available query types. Detailed information regarding the data available through the queries is provided on the portal and is available in separate documentation available from your Network Administrator or the PopMedNet™ support staff.

The currently available query types are:

1. Prevalence: Enrollment
2. Prevalence: HCPCS Procedures
3. Prevalence: ICD-9 Diagnoses (3 Digit Codes)
4. Prevalence: ICD-9 Diagnoses (4 Digit Codes)
5. Prevalence: ICD-9 Diagnoses (5 Digit Codes)
6. Prevalence: ICD-9 Procedures (3 Digit Codes)
7. Prevalence: ICD-9 Procedures (4 Digit Codes)
8. Prevalence: Pharmacy Dispensings by Generic Name
9. Prevalence: Pharmacy Dispensings by Drug Class

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Specify a Query

This page allows you to create menu-driven queries. Select a query category and query type using the drop down menus (step one) and follow the instructions. Select "Start This Query" to submit your request.

The data summaries represent **prevalence or incidence counts** of people and encounters/dispensings within each stratum.

Counts can be summed across age and sex strata within an observation period (e.g., year). To prevent double-counting, DO NOT sum person counts across periods or locations of service. For example, a person with diabetes in the outpatient setting in 2004 may also be counted in 2004 under inpatient diabetes and in 2005 under outpatient diabetes

1

Prevalence
Please select a query type
Please select a query type
Prev: Enrollment
Prev: HCPCS Procedures
Prev: ICD-9 Diagnoses (3 digit codes)
Prev: ICD-9 Diagnoses (4 digit codes)
Prev: ICD-9 Diagnoses (5 digit codes)
Prev: ICD-9 Procedure (4 digit codes)
Prev: ICD-9 Procedures (3 digit codes)
Prev: Pharmacy Dispensings by Drug Class
Prev: Pharmacy Dispensings by Generic Name

4.3.1 Enrollment

When you select Prevalence Enrollment from the query type menu in step 1, the screen displays the criteria you need to enter for this type of query. Step 1 is common to all types of queries. See Submitting a Query above, section 4.2.

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Specify a Query

1

Prevalence ▼

Prev: Enrollment ▼

Please enter a Query name

Brief description of query and the purpose (e.g. feasibility, power calculation, background rates):

Note: To update your email address, please go to the Users page under the Administration tab.

elizabeth_balaconis@harvardpilgrim.org

Enrollment figures stratified by age group, sex, and eligibility type.

Use this query to generate counts of members by age group, sex, year, and coverage type. Users can select members with drug coverage only, medical coverage only, or both drug and medical coverage.

2

Please select coverages:

☐ Drug and Medical Coverage
 ☐ Drug Coverage Only
 ☐ Medical Coverage Only
 ☐ All Members

3

Please select an Age Stratification:

10 Stratifications (0-1,2-4,5-9,10-14,15-18,19-24,25-29,30-34,35-39,40-44,45-49,50-54,55-59,60-64,65-69,70-74,75-79,80-84,85-89,90-94,95-99)

4

Please select Sex:

Male and Female ▼

5

Please select one or more Periods:

☐ 2000
 ☐ 2001
 ☐ 2002
 ☐ 2003
 ☐ 2004
 ☐ 2005
 ☐ 2006
 ☐ 2007
 ☐ 2008
 ☐ 2009
 ☐ 2010
 ☐ 2011
 ☐ 2012
 ☐ 2013
 ☐ 2014
 ☐ 2015
 ☐ 2016
 ☐ 2017
 ☐ 2018
 ☐ 2019
 ☐ 2020
 ☐ 2021
 ☐ 2022
 ☐ 2023
 ☐ 2024
 ☐ 2025
 ☐ 2026
 ☐ 2027
 ☐ 2028
 ☐ 2029
 ☐ 2030

6

Please select at least two DataMarts to which this query will be sent:

Note: Click a DataMart name to view details (Metzdata)

7

Finally, Submit Your Query By Clicking the Button Below:

Start This Query

Enter the following criteria for an Enrollment query:

Coverage	Select one of the coverage types that this query is based upon: Drug and Medical Coverage Drug Coverage Only Medical Coverage Only All Members (which represents a the union of previous 3 coverage types)
Age Stratification	Select the required age stratification from the drop down menu.
Sex Stratification	Select a sex grouping from the drop down menu to specify the sex stratification for your results (female only, male only, male and female, or male and female aggregated).
Period	Select one or more years. Check the box next to the year to include it in your query.
DataMarts	Select the DataMarts to submit your query to. Only the DataMarts that have data for the given Period are displayed.

Note: These counts are used to calculate prevalence rates as seen in Section 4.6.1.

4.3.2 HCPCS Procedures (Healthcare Common Procedure Coding System)

When you select Prevalence HCPCS Procedures from the query type menu in step 1, the screen displays the criteria you need to enter for this type of query. Step 1 is common to all types of queries. See Submitting a Query above, section 4.2.

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Specify a Query

1 Prevalence

Prev: HCPCS Procedures Five-digit HCPCS (CPT-4) procedure codes stratified by age group, sex, year, and location of service.

Please enter a Query name

Brief description of query and the purpose (e.g. feasibility, power calculation, background rates):

Note: To update your email address, please go to the Users page under the Administration tab.

elizabeth_balaconis@harvardpilgrim.org

Search by specific code, range of codes (e.g., 90600-90699) or keyword to identify codes for the query; wildcards (*) can be used. Select up to 10 codes, the setting (location of service), age group, sex, and period parameters. Then select the sites to query and click 'Start This Query'. Member counts within each location of service cannot be summed across location of service or period as some patients will have care in more than one setting or year.

2 **2 Options to Select Codes (can use both)**

The code set used for the specifications for HCPCS, ICD-9 Diagnosis (3, 4 and 5 digit) and ICD-9 Procedure (3 and 4 digit) query types are provided by Ingenix, Inc.

Enter Code(s) or text to search Search

Choose category... 00000-09999

Select Codes from Search List

Codes Selected for this Query:

4 **Please select an Age Stratification:**

10 Stratifications (0-1,2-4,5-9,10-14,15-18,19-24,25-29,30-34,35-39,40-44,45-49,50-54,55-59,60-64,65-69,70-74,75-79,80-84,85-89,90-94,95-99)

5 **Please select Sex:**

Male and Female

6 **Please select one or more Periods:**

☐ 2000
☐ 2001
☐ 2002
☐ 2003
☐ 2004
☐ 2005
☐ 2006
☐ ---

3 **Please select a Setting:**

Select

7 **Please select at least two DataMarts to which this query will be sent:**

Note: Click a DataMart name to view details (Metadata)

8

Finally, Submit Your Query By Clicking the Button Below:

Start This Query

Enter the following criteria for HCPCS Procedures query:

Code Selection	<p>You can choose up to 10 HCPCS (CPT-4) procedure codes to view in one query.</p> <p>There are two ways to select the codes:</p> <ul style="list-style-type: none">• Search by text string or code; search using wildcards “*” is available.• Choose a category and select from a list. The list shows code and name. Click on the column header to sort by code or by name. <p>Click on Add Codes to add the selected codes to the list and display the list.</p>
Setting	Select the care setting for the query: inpatient, outpatient (ambulatory), or emergency department.
Age Stratification	Select the required age stratification from the drop down menu.
Sex Stratification	Select a sex grouping from the drop down menu to specify the sex stratification for your results (female only, male only, male and female, or male and female aggregated).
Period	Select one or more years. Check the box next to the year to include it in your query.
DataMarts	Select the DataMarts to submit your query to. Only the DataMarts that have data for the given Period are displayed.

4.3.3 ICD-9 Diagnoses (3, 4 and 5 Digit Codes)

When you select Prevalence: ICD-9 Diagnoses (3, 4, or 5 Digit Codes) from the query type menu in step 1, the screen displays the criteria you need to enter for this type of query. Step 1 is common to all types of queries. See Submitting a Query above, section 4.2.

Note: Each different digit code represents a separate query. You may not combine different digit codes into one query.

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Specify a Query

1 Prevalence
 Prev: ICD-9 Diagnoses (3 digit codes) Three-digit ICD-9-CM diagnoses codes stratified by age group, sex, year, and location of service.
 Please enter a Query name
 Brief description of query and the purpose (e.g. feasibility, power calculation, background rates):

 Note: To update your email address, please go to the Users page under the Administration tab.
 elizabeth_balaconis@harvardpilgrim.org

Search by specific code, range of codes (e.g., 250-255) or keyword to identify codes for the query; wildcards (*) can be used. Select up to 10 codes, the setting (location of service), age group, sex, and period parameters. Then select the sites to query and click 'Start This Query'. Member counts within each location of service cannot be summed across location of service or period as some patients will have care in more than one setting or year.

2 2 Options to Select Codes (can use both)
 The code set used for the specifications for HCPCS, ICD-9 Diagnosis (3, 4 and 5 digit) and ICD-9 Procedure (3 and 4 digit) query types are provided by Ingenix, Inc.
 Enter Code(s) or text to search: _____ Search
 Choose category: _____
 (001-139) INFECTIOUS AND PARASITIC DISEASE
 Select Codes from Search List
 Codes Selected for this Query: _____

4 Please select an Age Stratification:
 10 Stratifications (0-1, 2-4, 5-9, 10-14, 15-18, 19-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75-84, 85-94, 95-104)

5 Please select Sex:
 Male and Female

6 Please select one or more Periods:
☐ 2000 ☐ 2001 ☐ 2002 ☐ 2003 ☐ 2004 ☐ 2005 ☐ 2006
☐ ----

3 Please select a Setting:
 Select

7 Please select at least two DataMarts to which this query will be sent:
 Note: Click a DataMart name to view details (Metadata)

8 Finally, Submit Your Query By Clicking the Button Below:

Enter the following criteria for an ICD-9 Diagnoses query:

Code Selection You can choose up to 10 ICD-9 diagnoses codes per query.

There are two ways to select the codes:

- Search by text string or code; search using wildcards “*” is available.
- Choose a category and select from a list. The list shows code and name. Click on the column header to sort by code or by name.

Click on **Add Codes** to add the selected codes to the list and display the list.

Age Stratification Select the required age stratification from the drop down menu.

Sex Stratification Select a sex grouping from the drop down menu to specify the sex stratification for your results (female only, male only, male and female, or male and female aggregated).

Setting Select the care setting for the query: outpatient, emergency department, or inpatient.

Period Select one or more years to include in your query. Check the box next to each year to add it to your query.

DataMarts Select the DataMarts to submit your query to. Only the DataMarts that have data for the given Period are displayed.

4.3.4 ICD-9 Procedures (3 and 4 Digit Codes)

When you select Prevalence: ICD-9 Procedures (3 or 4 Digit Codes) from the query type menu in step 1, the screen displays the criteria you need to enter for this type of query. Step 1 is common to all types of queries. See Submitting a Query above, section 4.2.

Note: Each different digit code represents a separate query type. You may not combine different digit codes into one query.

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Specify a Query

- Prevalence

Prev: ICD-9 Procedures (3 digit codes) Three-digit ICD-9-CM procedure codes stratified by age group, sex, year, and location of service.

Please enter a Query name

Brief description of query and the purpose (e.g. feasibility, power calculation, background rates):

Note: To update your email address, please go to the Users page under the Administration tab.

elizabeth_balaconis@harvardpilgrim.org

Search by specific code (including decimal), range of codes (e.g., 36.1-38.0) or keyword to identify codes for the query; wildcards (*) can be used. Select up to 10 codes, the setting (location of service), age group, sex, and period parameters. Then select the sites to query and click 'Start This Query'. Member counts within each location of service cannot be summed across location of service or period as some patients will have care in more than one setting or year.
- 2 Options to Select Codes (can use both)

The code set used for the specifications for HCPCS, ICD-9 Diagnosis (3, 4 and 5 digit) and ICD-9 Procedure (3 and 4 digit) query types are provided by Ingenix, Inc.

Enter Code(s) or text to search

Search

Choose category...

(00) PROCEDURES AND INTERVENTIONS, NOT I

Select Codes from Search List

Codes Selected for this Query:
- Please select a Setting:

Select
- Please select an Age Stratification:

10 Stratifications (0-1, 2-4, 5-9, 10-14, 15-18, 19-24, 25-34, 35-44, 45-54, 55-64, 65-74, 75-84, 85-94, 95-104)
- Please select Sex:

Male and Female
- Please select one or more Periods:

2000

2001

2002

2003

2004

2005

2006
- Please select at least two DataMarts to which this query will be sent:

Note: Click a DataMart name to view details (Metadata)
- Finally, Submit Your Query By Clicking the Button Below:

Start This Query

Enter the following criteria for an ICD-9 Procedures query:

Code Selection	<p>You can choose up to 10 ICD-9 procedure codes to view in one query.</p> <p>There are two ways to select the codes:</p> <ul style="list-style-type: none">• Search by text string or code; search using wildcards “*” is available.• Choose a category and select from a list. The list shows code and name. Click on the column header to sort by code or by name. <p>Click on Add Codes to add the selected codes to the list and display the list.</p>
Setting	Select the care setting for the query: inpatient, outpatient (ambulatory), or emergency department.
Age Stratification	Select the required age stratification from the drop down menu.
Sex Stratification	Select a sex grouping from the drop down menu to specify the sex stratification for your results (female only, male only, male and female, or male and female aggregated).
Period	Select one or more years. Check the box next to the year to include it in your query.
DataMarts	Select the DataMarts to submit your query to. Only the DataMarts that have data for the given Period are displayed.

4.3.5 Pharmacy Dispensings by Generic Name

When you select Prevalence: Pharmacy Dispensings by Generic Name from the query type menu in step 1, the screen displays the criteria you need to enter for this type of query. Step 1 is common to all types of queries. See Submitting a Query above, section 4.2.

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Specify a Query

1

Prevalence

Prew: Pharmacy Dispensings by Generic Name

Please enter a Query name

Brief description of query and the purpose (e.g. feasibility, power calculation, background rates):

Note: To update your email address, please go to the Users page under the Administration tab.
elizabeth_balacanis@harvardpilgrim.org

Search for a specific generic name, or select a drug class from the drop-down menu to identify all generic name in the selected drug class. Select up to 10 drug names to query, and the age group, sex, and period parameters. Then select the sites to query and click 'Start This Query'. Member counts cannot be summed across period as some patients will have dispensing in more than one period.

2

2 Options to Select Drugs (can use both)

Enter Code(s) or text to search

Search

Choose category...

(ADHD) Therapy, NRI-Type Attention Deficit-Hypera

Select Drugs from Search List

Drugs Selected for this Query:

3

Please select an Age Stratification:

10 Stratifications (0-1, 2-4, 5-9, 10-14, 15-18, 19+)

4

Please select Sex:

Male and Female

5

Please select a Period Type:

Please select a period type

6

Please select at least two DataMarts to which this query will be sent:

Note: Click a DataMart name to view details (Metadata)

7

Finally, Submit Your Query By Clicking the Button Below:

Start This Query

Enter the following criteria for a Pharmacy Dispensings by Generic Name query:

Drug Selection You can choose up to 10 drugs per query. Note: First DataBank was used to map National Drug Codes to the Generic Name list.

There are two ways to select the drugs:

- Search by text string or code; search using wildcards “*” is available.
- Choose a category and select from a list.

Click on **Add Codes** to add the selected drugs to the list and display the list.

Age Stratification Select the required age stratification from the drop down menu.

Sex Stratification Select a sex grouping from the drop down menu to specify the sex stratification for your results (female only, male only, male and female, or male and female aggregated).

Period Type Select the period type: Quarterly or Yearly.

Period Select one or more periods. Check the box next to the period to include it in your query.

DataMarts Select the DataMarts to submit your query to. Only the DataMarts that have data for the given Period are displayed.

4.3.6 Pharmacy Dispensing by Drug Class

When you select Prevalence: Pharmacy Dispensings by Drug Class from the query type menu in step 1, the screen displays the criteria you need to enter for this type of query. Step 1 is common to all types of queries. See Submitting a Query above, section 4.2.

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Specify a Query

Prevalence

Prev: Pharmacy Dispensings by Drug Class

Please enter a Query name

Note: To update your email address, please go to the Users page under the Administration tab.

elizabeth_balaconis@harvardpilgrim.org

Stratified by age group, sex, and period (either year or quarter). Results include members, dispensing, and days supplied.

Search for specific drug classes by name, or to view all drug classes, leave the search bar empty and click on the search button. Select up to 10 drug classes to query, and the age group, sex, and period parameters. Then select the sites to query and click 'Start This Query'. Member counts cannot be summed across period as some patients will have dispensing in more than one period.

2

Enter Code(s) or text to search

Search

Select Drugs from Search List

Drugs Selected for this Query:

3

Please select an Age Stratification:

10 Stratifications (0-1,2-4,5-9,10-14,15-18,19-24,25-34,35-44,45-54,55-64,65-74,75-84,85-94,95-104)

4

Please select Sex:

Male and Female

5

Please select a Period Type:

Please select a period type

6

Please select at least two DataMarts to which this query will be sent:

Note: Click a DataMart name to view details (Metadata)

7

Finally, Submit Your Query By Clicking the Button Below:

Start This Query

Developed by the PopMedNet™ support staff.

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Enter the following criteria for a Pharmacy Dispensings by Drug Class query:

Drug Class Selection	<p>You can choose up to 10 drugs per query. Note: First DataBank was used to map National Drug Codes to the Drug Class list.</p> <p>There are two ways to select the drugs:</p> <ul style="list-style-type: none">• Search by text string or code; search using wildcards “*” is available.• Select from a list of drug classes. Leave the text box blank and click Search to display the list of drug classes available for this query. Check the box next to each drug class to include in your query. <p>Click on Add Codes to add the selected drug classes to the list and display the list.</p>
Age Stratification	Select the required age stratification from the drop down menu.
Sex Stratification	Select a sex grouping from the drop down menu to specify the sex stratification for your results (female only, male only, male and female, or male and female aggregated).
Period Type	Select the period type: Quarterly or Yearly.
Period	Select one or more periods. Check the box next to the period to include it in your query.
DataMarts	Select the DataMarts to submit your query to. Only the DataMarts that have data for the given Period are displayed.

4.4 File Distribution

The File Distribution screen allows you to distribute any type of file to the network DataMarts. You can upload files for distribution to a selected DataMart.

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File Distribution

This page allows you to distribute files to data partners. Follow these steps: (1) Enter name for this query, (2) Provide a brief description, (3) Browse and upload the file to share, (4) Select the DataMarts to distribute the file to, (5) Click on "Start this Query" to complete.

File Distribution:

Please enter a Query name *

Brief description of query and the purpose, eg. feasibility query in preparation for a grant submission):

Please provide your email address so health plans can contact you with any questions:
Note: To update your email address, please go to the Users page under the Administration tab.
 bswan@lincolnpeak.com

Please select a file to Upload: *
Note: 5 files can be uploaded in total with each file not exceeding 5 MB

Browse... Upload

Please select at least two DataMarts to which this query will be sent: *
Note: Click a DataMart name to view details (Metadata)

☐ LPP Test

Distribute Query

Use these steps to upload a file to selected DataMarts:

1. Enter a unique query name.
2. Enter a brief description of the query.
3. Click the Browse button to select a file.
4. After you select each file, click the Upload button.
5. Once you have selected the desired file(s), click the Distribute Query button.

4.5 Checking the Query Status

You can view the status of a query using the Results tab. You must be logged in to view query status.

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Query Status

Click "View Details" to see query status by DataMart. You may sort queries by clicking on column titles and filter queries by type using the drop down menu.

Select Range: Custom From Date: 04/15/2011 To Date: 04/22/2011 Filter

All query types

Name	ID	Submitted On	Submitted By	Status	Type
My Unique Query Name	193	4/22/2011 11:00:59 AM	HPHC Investigator	Completed	Prev: Enrollment View Details

1

Use these steps to view the status of a query:

1. At the top of the home page, click Results. The page displays a list of your queries. The Status column shows whether your query is completed, partially completed, or submitted.
2. Click on the column name to sort the queries. For example, if you want to view queries by date they were submitted, click Submitted On.
3. To see status for a specific query type, choose the query type from the drop down menu on the right. To filter the query results by date, select the range in the top left and click Filter.
4. Click on View Details to see query status by DataMart as shown on the View a Query screen in section 4.6 Viewing Query Results below. This displays a list of all the DataMarts to which you submitted the query along with status for each DataMart.

4.6 Viewing Query Results

You can view the results of a query on the View a Query screen, after clicking on View Details for the query of interest on the Query Status page as described in section 4.5 above.

A user designated as an Enhanced Investigator will have the right to view site results individually across the organizations within the query. This role will be assigned at the discretion of a Network Administrator and in accordance with the governance of the system.

Note: Be sure to check the status of a query before you view the results. **If you select View Result before all DataMarts have uploaded their results, you will cancel queries which have not yet been responded to** (i.e., you will not be able to see any results from the DataMarts that did not respond to that query). If you want information from those DataMarts, you must submit a new query.

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View a Query

This page allows you to view query **My Unique Query Name ID 193** of type **Prev: Enrollment** submitted **4/22/2011 11:00:59 AM**.

Click on "View Result" to view or export query results. Click "Refresh" to update query status.

DataMart Results

DataMart	Last Response	Message
<input type="checkbox"/> HMORN Partner 1	Completed	
<input type="checkbox"/> HMORN Partner 2	Completed	

Add **View Selected Results** **View Result** **Refresh**

Use these steps to view query results:

1. Complete the steps described in the Checking Query Status section to navigate to the View a Query page.
2. Check the status column to verify that all results have been uploaded.
3. Click on the View Result button.
4. View the query results on the View Results screen as shown in the screen shot below.

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View Results

This page displays the results of your query.

Query Name: My Unique Query Name

Submitted: 4/22/2011 11:00:59 AM

Query Text: `Select AgeGroup, gender as Sex, Year, DrugCov as DrugCoverage, MedCov as MedicalCoverage, Sum(Member) as Members From (SELECT '0-21' as AgeGroup, Sex as gender, Year,'All' as DrugCov,'All' as MedCov, Sum(Members) as Member FROM Enrollment WHERE year IN ('2016','2017','2018') AND Age_Group in ('0-1','2-4','5-9','10-14','15-18','19-21')`

Results From: HMORN Partner 1
HMORN Partner 2

Export to: Excel Export

AgeGroup	Sex	DrugCoverage	MedicalCoverage	Year	Members
0-21	F	All	All	2016	6314
0-21	F	All	All	2017	6018
0-21	F	All	All	2018	6070
0-21	M	All	All	2016	6436
0-21	M	All	All	2017	6332
0-21	M	All	All	2018	6158
22-44	F	All	All	2016	8650
22-44	F	All	All	2017	8304
22-44	F	All	All	2018	8084
22-44	M	All	All	2016	7382
22-44	M	All	All	2017	7190
22-44	M	All	All	2018	7038
45-64	F	All	All	2016	6096

4.6.1 Calculated Rates Columns

The calculated columns are included to give supporting information for the codes of interest. The Enrollment summary tables for each category are used with the corresponding selected query type to calculate the rates.

Medical Queries: HCPCS Procedures, ICD-9 Diagnoses and Procedures

- Total Enrollment in Strata (Members)-Total count includes members with both medical and drug coverage plus those with medical coverage only.
- Prevalence Rates (Users per 1000 enrollees)
- Event Rate (Events per 1000 enrollees)
- Events per Member

Drug Queries: Pharmacy Dispensings by Generic Name and Drug Class

- Total Enrollment in Strata (Members)- Total count includes members with both medical and drug coverage plus those with drug coverage only.
- Prevalence Rates (Users per 1000 enrollees)
- Dispensing Rate (Dispensings per 1000 enrollees)

- Days per Dispensing
- Days per User

4.7 Exporting Result Data

You can export the result data to a CSV File or to Excel from the View Results screen.

Use these steps to export data:

1. Choose CSV or Excel from the “Export to:” drop down box.
2. Click the Export button.

The file name for your exported data is made up of: the query name up to the first space in the name. For example: if your query name is “NamingScheme_SummaryQuery for Query Tool,” the name of the file will be “NamingScheme_SummaryQuery.xls.”

4.8 Rerouting Submitted Queries

Before viewing your query result, you can add DataMarts to or remove them from a query. Note: You cannot remove a particular DataMart after it has uploaded results to the query.

Use these steps to re-route a query:

1. Click the arrow on the far right of the DataMart you would like to remove from the query.
2. Select a different DataMart to send the query to.
3. An email will be sent to the removed DataMart to cancel the request, while a new query email will be sent to the added DataMart.

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View a Query

This page allows you to view query **Re-routing Query ID 539** of type **Prev: Enrollment** submitted 2/25/2011 2:04:46 PM.

Click on "View Result" to view or export query results. Click "Refresh" to update query status.

DataMart Results

DataMart	All	Last Response	Message
<input type="checkbox"/> Test Org 1	Submitted		
<input type="checkbox"/> Test Org 2	Submitted		

Remove

Select DataMart to Add to this query

- ☐ LPeak-auto1
- ☐ LPeak-auto2
- ☐ HPHCI-Summary Tables
- ☐ LPeak-auto3
- ☐ LPeak-auto4
- ☐ LPP Test 2

Add **Cancel**

4.8.1 Removing a DataMart from a Query

Use these steps to remove a DataMart from a query:

1. On the View a Query page, check the box beside the DataMart(s) you would like to remove from the query.
2. Click the Remove button.
3. An email will be sent to the removed DataMart(s) cancelling your query request.

View a Query

This page allows you to view query **test953** ID **63** of type **Pharmacy Dispensings by Generic Name** submitted **10/27/2010 9:54:07 AM**.

Click on "View Result" to view or export query results. Click "Refresh" to update query status.

DataMart Results

DataMart	All	Last Response	Message
<input type="checkbox"/> LPeak-auto1	Completed		
<input type="checkbox"/> LPeak-auto2	Completed		
<input type="checkbox"/> LPP Test	Submitted		→
<input type="checkbox"/> LPeak-auto3	Pending Group DataMart Administrator Approval		
<input type="checkbox"/> LPeak-auto4	Pending Group DataMart Administrator Approval		
<input type="checkbox"/> LPP Test 2	Submitted		→

Remove

Add

View Result

Refresh

4.8.2 Adding a DataMart to a Query

Use these steps to add a DataMart to a query:

1. On the View a Query page, click the Add button to display a list of possible DataMarts.
2. Check box for each of the DataMarts that you would like to send the query to.
3. Click the Add button.
4. The query request will be sent to the newly added DataMart(s).

View a Query

This page allows you to view query **Enrollment counts** ID **322** of type **Prev: Enrollment** submitted **12/11/2010 3:47:35 PM**.

Click on "View Result" to view or export query results. Click "Refresh" to update query status.

DataMart Results

DataMart	All
<input type="checkbox"/> LPeak-auto1	Completed
<input checked="" type="checkbox"/> LPeak-auto2	Completed
<input type="checkbox"/> HPHCI-Summary Tables	Submitted
<input checked="" type="checkbox"/> LPeak-auto3	Completed
<input checked="" type="checkbox"/> LPeak-auto4	Completed

Remove

Add

Select DataMart to Add to this query

<input type="checkbox"/> LPP Test 2
<input checked="" type="checkbox"/> Test Database
<input type="checkbox"/> KPCO Test
<input type="checkbox"/> KPNW Test
<input type="checkbox"/> KPNC Test
<input type="checkbox"/> Liz 1
<input type="checkbox"/> Liz 2

Add

Cancel

Refresh

5 Notification E-mails

This section describes how to set up notifications to be e-mailed to your email address. You must be logged in to the web portal to change your notification settings. Click Notification Options on the Notifications tab at the top of the page to display the page shown below.

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Notification Option

This page allows you to choose Notification options.

Notification Options	Email	Description
Investigator		
Query Status Change	<input type="checkbox"/>	"Query Status Change" email notifications are sent to the person that submitted a query. These emails are sent when the "status" of processing that query has changed. Currently, there are 2 types of status changes that will trigger sending an email (Hold and Reject). Note: If you'd like to be notified when the results of your query have been uploaded, please select the notification option entitled "New Results" below.
New Results	<input type="checkbox"/>	"New Results" email notifications are sent to "query submitters" to alert them when the results of their queries have been uploaded by Data Mart Administrators (i.e., those data marts that don't process queries automatically).
Query Submitter Reminder	<input type="checkbox"/>	Query Submitter Reminder" email notifications are sent to "query submitters" to alert them when one or more Data Marts have not uploaded results for the query submitted. The submitter can choose the frequency in which they want to receive the reminders from the available options ("Everyday", "Every 2 days"...). Note: The submitter will be delivered one reminder per query submitted based on the selected frequency.

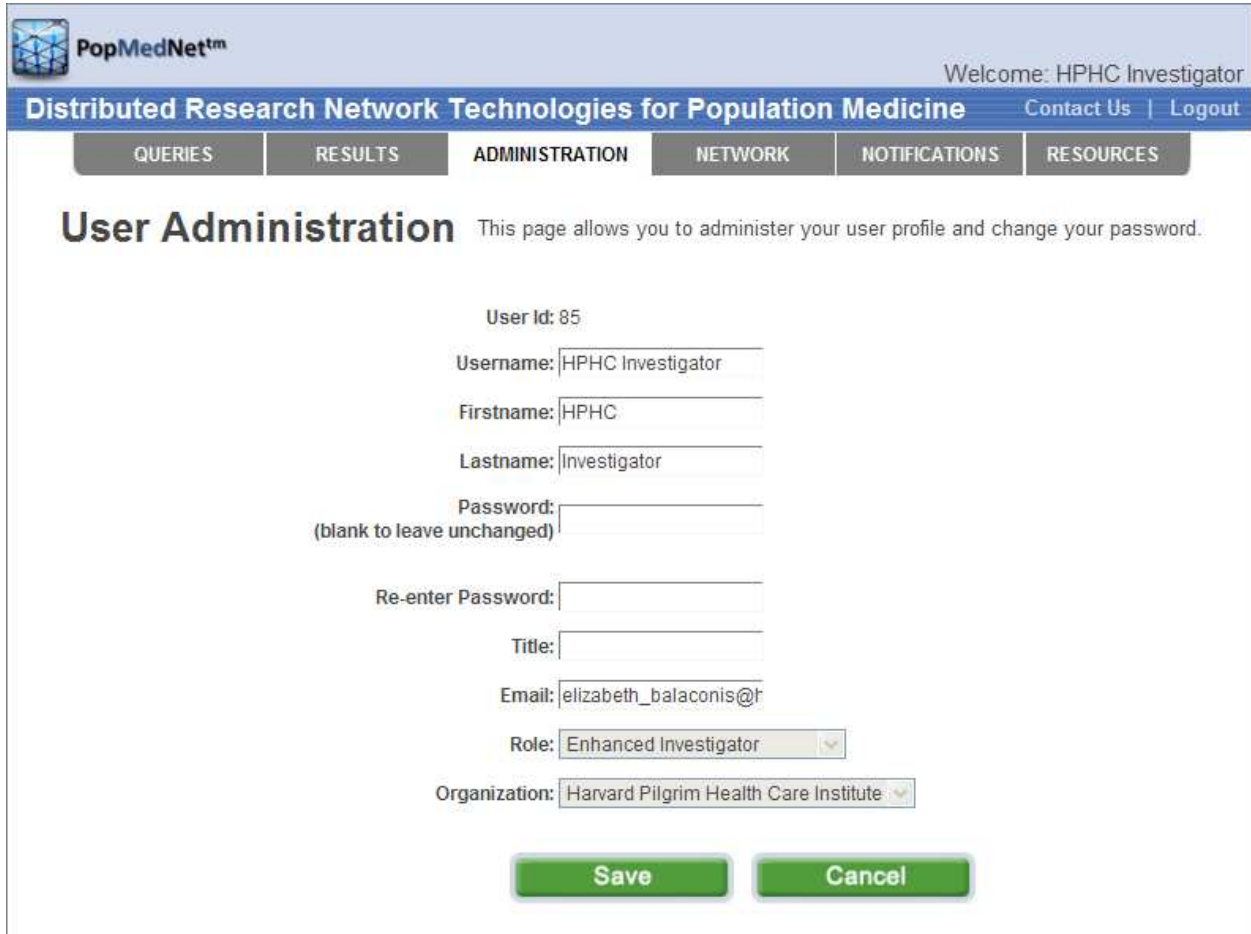
Save
Cancel

The notification options for the Investigator role are:

Query Status Change	Notifies you when your submitted query has been on placed on hold or rejected by the DataMart administrator that you submitted the query to.
New Results	Notifies you when the DataMart administrator has accepted your query and the query results have been uploaded.
Query Submitter Reminder	Notifies you when one or more DataMarts have not uploaded results for the query submitted.

6 Administering your User Profile

This section describes how to administer your user profile. You must be logged in to the web portal to administer your user profile. Click Users on the Administration tab located at the top of the screen. The screen displays your user profile.



The screenshot displays the PopMedNet web portal interface. At the top, the PopMedNet logo is on the left, and the text "Welcome: HPHC Investigator" is on the right. Below the logo, the header reads "Distributed Research Network Technologies for Population Medicine" with links for "Contact Us" and "Logout". A navigation bar contains tabs for "QUERIES", "RESULTS", "ADMINISTRATION", "NETWORK", "NOTIFICATIONS", and "RESOURCES". The "ADMINISTRATION" tab is selected, leading to the "User Administration" page. A sub-header states: "This page allows you to administer your user profile and change your password." The form displays the following fields: "User Id: 85", "Username: HPHC Investigator", "Firstname: HPHC", "Lastname: Investigator", "Password:" (with a note "(blank to leave unchanged)"), "Re-enter Password:", "Title:", "Email: elizabeth_balaconis@t", "Role: Enhanced Investigator" (a dropdown menu), and "Organization: Harvard Pilgrim Health Care Institute" (a dropdown menu). At the bottom of the form are two green buttons: "Save" and "Cancel".

6.1 How to Reset your Password

Your user profile has two boxes for passwords. To change your password:

1. Enter the new password in the first Password box.
2. Re-enter the new password in the second Password box.
3. Click the Save button.

Note: All passwords must meet the following complexity standard:

- Length must be at least 7 characters
- Password must include at least 1 upper case letter, 1 lower case, 1 number, and 1 symbol.

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User Administration

This page allows you to administer your user profile and change your password.

User Id: 85

Username:

Firstname:

Lastname:

Password: Very poor
(blank to leave unchanged)

5 more characters, 1 more numbers, 1 more upper case characters, 1 symbol characters

Re-enter Password:

Title:

Email:

Role:

Organization:

Save
Cancel

Once you initially get your login credentials from the system administrator, it is highly advised that you change your password from the default password given to you.

7 Getting Help

Once logged in, the Resource Tab offers helpful contact information, documentation, and related links, as seen below.

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Resources

Contact Information

Coordinating Center Contact:
Popmednet@hphc.org

Lincoln Peak Partners Contact:
support@lincolnpeak.com

Documentation

[Overview and Technical Documentation](#) This document describes the overall architecture of the system., and details the technical and security approaches implemented.

[Investigator Manual](#) This SAMPLE Investigator's Manual describes the main features and functions for Investigators participating in a health data network powered by PopMedNet™ software.

Related Links

[PopMedNet Portal](#)

If you have trouble accessing the Web Portal or your user account, click on the Contact Us link and describe your issue to request help from the PopMedNet™ support staff.

8 Development and Funding Statement

The **PopMedNet™** software application was developed as part of several contracts awarded by the Agency for Healthcare Research and Quality to the HMO Research Network (HMORN) Center for Education and Research on Therapeutics (CERT) DEcIDE Center housed in the Department of Population Medicine at the Harvard Pilgrim Health Care Institute (HPHCI). The software application has been enhanced using additional funding via the FDA Mini-Sentinel contract with Harvard Pilgrim Health Care. The system was developed by Lincoln Peak Partners under the direction of HPHCI.

9 Frequently Asked Questions

This section lists some of the most frequently asked questions.

What is the difference between Groups, Organizations, and Users?

Users are individuals with various roles and associated rights within the system such as Investigator, DataMart Administrator, and System Administrator. Individual users may be part of a Group or Organization.

What are my rights as a user and how can I change them?

Rights can only be assigned to various roles by the Network Administrator. The Network Administrator can also assign rights to multiple users by giving that right to an Organization or Group.

Where can I get more information on the PopMedNet™ application?

You may contact the Operations Center for more information:

Jeffrey Brown, PhD
Harvard Pilgrim Health Care Institute
Jeff_brown@hphc.org

When I viewed my results, I got the error message “No data available for display.”What does this mean?

The screenshot shows the 'View Results' page in the PopMedNet application. At the top, there is a navigation bar with tabs: QUERIES, RESULTS (selected), ADMINISTRATION, NETWORK, NOTIFICATIONS, and RESOURCES. Below the navigation bar, the page title is 'View Results' and a subtitle reads 'This page displays the results of your query.' A red error message states 'No data available for display.' Below this, the 'Query Name' is 'incidence asthma 2' and the 'Submitted' time is '2/17/2011 12:26:49 PM'. The 'Query Text' is displayed in a text area: 'Select SummaryData.*, EnrollmentData.EnrollmentMembers as [Total Enrollment in Strata(Members)],round(SummaryData.Members / EnrollmentData.EnrollmentMembers * 1000, 1) as [Prevalence Rate (Users per 1000 enrollees)],round(SummaryData.Events / EnrollmentData.EnrollmentMembers * 1000, 1) as [Event Rate (Events per 1000 enrollees)].'. Below the query text, it says 'Results From: HPHCI-Summary Tables'. At the bottom, there is an 'Export to:' dropdown menu set to 'Excel' and a green 'Export' button.

This means that the sites queried had no data in their database that matched your query specifications so an empty set was returned to the portal

Appendix A: Quick Reference for Investigators

Quick Reference: Investigator

1. How to Submit a Summary Query
 - a. Log into the Portal with your **Investigator** credentials.
 - b. Select the Summary Query button on the main page or from the *Queries* tab.
 - c. Complete the Summary Query form by entering a name, brief description of the query, and selecting the relevant parameters.
 - d. Select the DataMarts (Data Partners) who you would like to send the query.
 - e. Select *Start this Query*.
2. How to Distribute a File
 - a. Log into the Portal with your **Investigator** credentials.
 - b. Select the File Distribution button on the main page or from the *Queries* tab.
 - c. Complete the File Distribution form by entering a name and a brief description of the file(s) you are sending.
 - d. Browse and upload your file(s) one at a time.
 - e. Select the DataMarts (Data Partners) who you would like to send the file(s).
 - f. Select *Distribute Query*.
3. How to View Results on the Portal
 - a. Log into the Portal with your **Investigator** credentials and go to the *Results* tab.
 - b. Click on *View Details* to view query response status. You may add/remove sites to the query, if necessary.
 - c. When all sites have responded, click *View Result*. Enhanced Investigators may view site-specific results by checking a site and clicking *View Selected Results*.
 - d. Export Summary Query data to Excel/CSV or download returned files for review.

Appendix B: Query Administrator Role

The Query Administrator acts as a gatekeeper for all the queries coming out of an organization. Given budgeting for queries, this role can monitor query submission so that only the most relevant queries are distributed to the sites in the network.

Once an investigator within the organization submits a query, the query administrator receives an email notification about a query that is 'Pending QA Approval.' The Query Administrator then logs in with his/her login credentials. The Query Status page includes an extra column specifically for query approval.

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Query Status

Click "View Details" to see query status by DataMart. You may sort queries by clicking on column titles and filter queries by type using the drop down menu.

Select Range: 30 Days Filter

All query types

Name	ID	Submitted On	Submitted By	Status	Type		
Query Administrator Test Query	631	4/1/2011 2:04:24 PM	Query Admin Test	Pending QA Approval	Prev: ICD-9 Diagnoses (3 digit codes)	View Details	View Query
ffrefr	630	4/1/2011 1:39:09 PM	Query Admin Test	Hold	Prev: Enrollment	View Details	View Query
bbbbbb	627	4/1/2011 10:17:29 AM	Liz Test	1/2 Completed	Prev: Enrollment	View Details	View Query
aaa	626	3/31/2011 4:37:58 PM	Liz Test	Completed	Inci: Enrollment	View Details	View Query
query type check	625	3/31/2011 4:26:52 PM	Query Admin Test	Completed	Prev: ICD-9 Procedures (3 digit codes)	View Details	View Query

By clicking 'View Query,' the query administrator views the parameters of the query. Queries may be submitted, held, or rejected by the query administrator, who can provide comments to the investigator about the query.

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View a Query

1

Prevalence

Prev. ICD-9 Diagnoses (3 digit codes)

Three-digit ICD-9-CM diagnoses codes stratified by age group, sex, year, and location of service.

Query Administrator Test Query

Brief description of query and the purpose (e.g. feasibility, power calculation, background rates):

Showing how the query admin role works.

Note: To update your email address, please go to the Users page under the Administration tab.

elizabeth_talacomic@stanfordpligrim.org

Search by specific code, range of codes (e.g., 250-255) or keyword to identify codes for the query; wildcards (*) can be used. Select up to 10 codes, the setting (location of service), age group, sex, and period parameters. Then select the sites to query and click 'Start This Query'. Member counts within each location of service cannot be summed across location of service or period as some patients will have care in more than one setting or year.

2

2 Options to Select Codes (can use both)

The code set used for the specifications for HCPCS, ICD-9 Diagnosis (3, 4 and 5 digit) and ICD-9 Procedure (3 and 4 digit) query types are provided by Ingenix, Inc.

Codes Selected for this Query:

☒ 493 ASTHMA

4

Please select an Age Stratification:

10 Stratifications (0-1,2-4,5-9,10-14,15-18,19-21,22-4)

5

Please select Sex:

Male and Female

6

Please select one or more Periods:

☒ 2016
☒ 2017
☒ 2018

3

Please select a Setting:

Inpatient

7

Please select at least two DataMarts to which this query will be sent:

Note: Click a DataMart name to view details (Metadata)

☒ LPLess-acute
☒ Test Org 1
☒ Test Org 2

8

Finally, Submit/Hold/Reject Your Query By Clicking the Button Below:

Comments:

Note: Comments will be sent to the requesting investigator.


Submit

Hold

Reject

As results are uploaded to the query, the Query Administrator can view individual site results, just like an Enhanced Investigator. Query Administrators can also submit queries.

The Query Administrator has an additional query notification for pending queries than investigators.


Welcome: Query Admin Test

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Notification Option

This page allows you to choose Notification options.

Notification Options	Email	Description
Investigator		
Query Status Change	<input checked="" type="checkbox"/>	"Query Status Change" email notifications are sent to the person that submitted a query. These emails are sent when the "status" of processing that query has changed. Currently, there are 2 types of status changes that will trigger sending an email (Hold and Reject). Note: If you'd like to be notified when the results of your query have been uploaded, please select the notification option entitled "New Results" below.
New Results	<input checked="" type="checkbox"/>	"New Results" email notifications are sent to "query submitters" to alert them when the results of their queries have been uploaded by Data Mart Administrators (i.e., those data marts that don't process queries automatically).
Query Submitter Reminder	<input checked="" type="checkbox"/> <div>Everyday</div>	Query Submitter Reminder" email notifications are sent to "query submitters" to alert them when one or more Data Marts have not uploaded results for the query submitted. The submitter can choose the frequency in which they want to receive the reminders from the available options ("Everyday", "Every 2 days"...). Note: The submitter will be delivered one reminder per query submitted based on the selected frequency.
Query Administrator		
New Query for Query Administrator	<input checked="" type="checkbox"/>	For Query Administrators: "New Query" email notifications are sent to the query administrators of the query submitter's organization. It alerts these administrators that a new query has been submitted and requires their action in order to process it.

Save
Cancel