

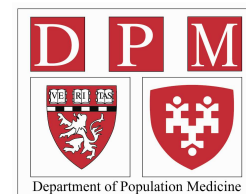


Investigator Guide

The HMORN CERT DEcIDE Center Distributed Query Tool

Version 2.1.10

December 2010



Harvard Pilgrim Health Care Institute
133 Brookline Ave, 6th Floor
Boston, MA 02215
Phone: 617-509-9900
Fax: 617-859-8112

Contents

1	Introduction	3
2	How to Login to the Web Portal	5
3	Submitting a Query, Viewing Query Status, and Viewing Results	6
3.1	Getting Started.....	6
3.2	Submitting a Query	7
	Query Types	9
3.2.1	Pharmacy Dispensings by Generic Name.....	10
3.2.2	Pharmacy Dispensing by Drug Class.....	12
3.2.3	ICD-9 Diagnoses (3 Digit Codes).....	14
3.2.4	ICD-9 Diagnosis (4 Digit Codes) & (5 Digit Codes).....	16
3.2.5	ICD-9 Procedures (4 Digit Codes)	18
3.2.6	ICD-9 Procedures (3 Digit Codes)	20
3.2.7	HCPSC Procedures (Healthcare Common Procedure Coding System).....	22
3.2.8	Eligibility and Enrollment	24
3.3	File Distribution.....	26
3.4	Checking the Query Status.....	27
3.5	Viewing Query Results	28
3.6	Exporting Result Data.....	29
3.7	Rerouting Submitted Queries	30
3.7.1	Removing a DataMart from a Query.....	30
3.7.2	Adding a DataMart to a Query.....	30
4	Notification E-mails.....	32
5	Administering / Changing your User Profile	33
5.1	How to Reset your Password	34
5.2	How to Update your E-mail.....	35
6	Getting Help	36
6.1	Frequently Asked Questions	36

1 Introduction

This Investigator's manual describes how to use the Distributed Query Tool and Portal. The Query Tool and Portal is a software application that allows authorized investigators to create and distribute queries to network data partners through a web-based querying Portal.

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.

Audience

This manual is intended for query tool Investigators who want to:

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

Concepts

If you are a new user, it helps to understand a few key concepts before you begin building queries.

Concept	Description
Queries	The portal allows you to create queries and submit them to DataMarts.
Roles	<p>Roles determine the rights that individual users have when using the Portal. Only the System Administrator adds users to the network, and in accordance with system governance. There are two types of Investigator roles that can be assigned:</p> <p><u>Investigator</u>: can submit queries to DataMarts that have given them or their organization permission to submit queries and view only aggregated query results.</p> <p><u>Enhanced Investigator</u>: 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 site results individually across the organizations within the query.</p>
DataMarts	The specific DataMarts that you have access to as an Investigator depends on the rights assigned by the DataMart Administrator (also a system role). Each data partner assigns at least one DataMart Administrator. The DataMart Administrator

establishes the DataMart querying and permission settings.

Related Documents

For more information about the Distributed Query Tool and Portal, see one of the following documents:

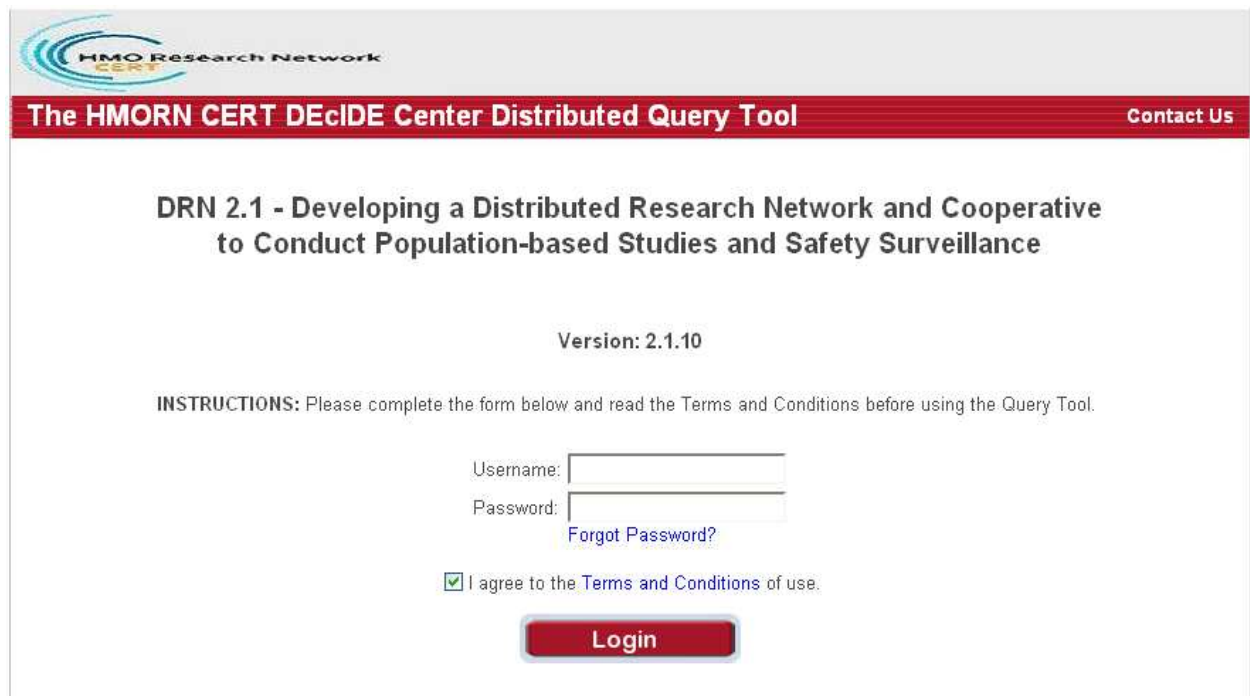
DataMart Administrator's Guide

The *DataMart Administrator's Guide* 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

2 How to Login to the Web Portal

Before you can login to the portal, you need a username and password assigned by the System Administrator. Once you have your Login Credentials, follow the steps below.



The screenshot shows the login interface for the HMORN CERT DECIDE Center Distributed Query Tool. At the top left is the HMO Research Network logo. A red header bar contains the title 'The HMORN CERT DECIDE Center Distributed Query Tool' and a 'Contact Us' link. The main content area has the title 'DRN 2.1 - Developing a Distributed Research Network and Cooperative to Conduct Population-based Studies and Safety Surveillance' and 'Version: 2.1.10'. Below this are instructions: 'INSTRUCTIONS: Please complete the form below and read the Terms and Conditions before using the Query Tool.' The login form includes fields for 'Username:' and 'Password:', a 'Forgot Password?' link, a checkbox for 'I agree to the Terms and Conditions of use.', and a red 'Login' button.

Use these steps to login to the portal:

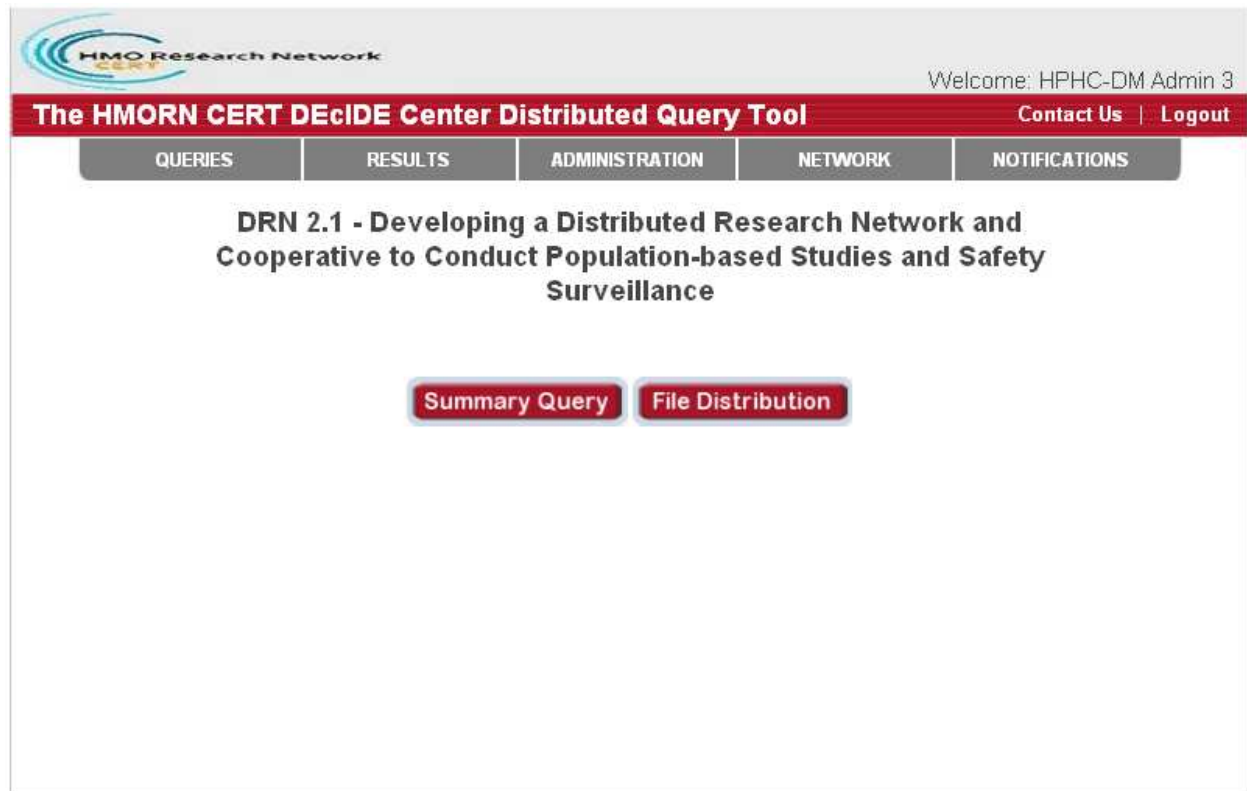
1. Navigate to the Distributed Query Tool and Portal website login page.
2. Enter your username and password in the boxes.
3. If this is your first login, you will be prompted to read and acknowledge your agreement to the Terms and Conditions of use. If you have cookies enabled, you will not be prompted on subsequent logins.
4. Check the check box to agree to the Terms and Conditions of use (Initial Login only)
5. Click the Login button to enter the Portal.

3 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 Summary 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 3.3.

3.1 Getting Started

Click the Summary Query button to begin creating your query.



3.2 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. Required data fields are marked with a red asterisk*.

Procedure

Follow these basic steps to submit a query:

1. Choose a query type from the drop down menu.
2. 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.
3. 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 that this field only appears after you select the query type.

Note: This step also displays your email address. However, you cannot change your email address here. See section 5.2 of this manual for information on how to change your email address.

4. Follow the numbered steps on the screen to enter criteria for each query type.
5. Note that 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.
6. Click the Start This Query button to submit the query. The query goes out to all the DataMarts that you have selected.

Specify a Query

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

Please select a query type

Please select a query type
Eligibility and Enrollment
HCPCS Procedures
ICD-9 Diagnoses
ICD-9 Diagnosis (4 digit codes)
ICD-9 Diagnosis (5 digit codes)
ICD-9 Procedure (4 digit codes)
ICD-9 Procedures
Pharmacy Dispensings by Drug Class
Pharmacy Dispensings by Generic Name

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.

The currently available query types are:

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

3.2.1 Pharmacy Dispensings by Generic Name

When you select 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.

The HMORN CERT DEcIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

Pharmacy Dispensings by Generic Name

Stratified by age, group, sex, and period (either year or quarter).

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.
elizabeth_balaconis@harvardpilgrim.org

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-Hyper

Select Drugs from Search List

Drugs Selected for this Query: *

3

Please select an Age Stratification:*

8 Stratifications (0- 4,5- 9,10-14,15-19,20-4)

4

Please select Sex:*

Female Only

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 DataMartname 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 Select all the drugs that this query is based upon.

There are two ways to select the drugs:

- Search by text string or code
- Choose a category and select from a list

You can use both options to create your list.

You can choose up to 10 drugs per query.

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 (males only, females only, males and females, or no sex stratification).

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.

3.2.2 Pharmacy Dispensing by Drug Class

When you select 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.

The HMORN CERT DECIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

Pharmacy Dispensings by Drug Class

Stratified by age group, sex, and period (either year or quarter). Drug class based on FirstDataBank drug class categories assigned at the NDC level.

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.

elizabeth_balaconis@harvardpilgrim.org

Select up to 10 drug classes to view, then select the observation period (year or quarters), the specific periods to extract, and click 'Start This Query'. All queries return results stratified by age group and sex for each period selected.

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:*

8 Stratifications (0- 4,5- 9,10-14,15-19,20-4)

4

Please select Sex:*

Female Only

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

12

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

Drug Class Selection Select all the drug classes that this query is based upon. You may select up to 10 drug classes.

There are two ways to select the drugs:

- Search by text string or code.
Enter search string in the text box and click Search.
- 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.

Click on **Add Codes** to add the selected drug classes 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 (males only, females only, males and females, or no sex stratification).

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.

3.2.3 ICD-9 Diagnoses (3 Digit Codes)

When you select ICD-9 Diagnoses (3-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.

The HMORN CERT DECIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

ICD-9 Diagnoses

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

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 Settings page under the Administration tab.
elizabeth_balaconis@harvardpilgrim.org

2

2 Options to Select Codes (can use both)

Enter Codes (use text to search)

Search

Choose category...

(001-139) INFECTIOUS AND PARASITIC DISEASE

Select Codes from Search List

Code(s) Selected for this Query: *

4

Please select an Age Stratification:*

8 Stratifications (0- 4,5- 9,10-14,15-19,20-4)

5

Please select Sex:*

Female Only

6

Please select one or more Periods:*

☐ 2000

☐ 2001

☐ 2002

☐ 2003

☐ 2004

☐ 2005

☐ 2006

END YEAR

3

Please select a Setting: *

Please select diagnosis setting

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 an ICD-9 Diagnoses query:

Code Selection Select all the three-digit ICD-9 diagnosis codes that this query is based upon.

There are two ways to select the codes:

- Search by text string or code
- 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.

You can use both options to create your list.

You can choose up to 10 three-digit ICD-9 diagnosis codes per query.

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 (males only, females only, males and females, or no sex stratification).

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. Note: This data is not available by quarter.

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

3.2.4 ICD-9 Diagnosis (4 Digit Codes) & (5 Digit Codes)

When you select ICD-9 Diagnosis (4 Digit Codes) or ICD-9 Diagnosis (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.

The HMORN CERT DEcIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

ICD-9 Diagnosis (4 digit codes)

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

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.
elizabeth_balacanis@harvardpilgrim.org

2

2 Options to Select Codes (can use both)

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:*

8 Stratifications (0- 4,5- 9,10-14,15-19,20-4)

5

Please select Sex:*

Female Only

6

Please select one or more Periods:*

☐ 2000
☐ 2001
☐ 2002
☐ 2003
☐ 2004
☐ 2005
☐ 2006
☐ 2007

7

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

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

3

Please select a Setting:*

Please select diagnosis setting

8

Finally, Submit Your Query By Clicking the Button Below:

Start This Query

Enter the following criteria for an ICD-9 Diagnosis (4 Digit Codes or 5 Digit Codes) query:

Code Selection Select all the ICD-9 diagnosis codes that this query is based upon.

There are two ways to select the codes:

- Search by text string or code
- 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.

You can use both options to create your list.

You can choose as many ICD-9 diagnosis codes to view as you want to.

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

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

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 (males only, females only, males and females, or no sex stratification).

Period Select one or more years to include in your query. Check the box next to each year to add it to your query. Note: This data is not available by quarter.

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

3.2.5 ICD-9 Procedures (4 Digit Codes)

When you select ICD-9 Procedure (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.

The HMORN CERT DEcIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

ICD-9 Procedure (4 digit codes)

Four-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, 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.
elizabeth_balaconis@harvardpilgrim.org

2

2 Options to Select Codes (can use both)

Enter Code(s) or text to search

Search

Choose category...

(00-00) PROCEDURES AND INTERVENTIONS, NOT ELSEWHERE CLASSIFIED

Select Codes from Search List

Codes Selected for this Query:

4

Please select an Age Stratification:

8 Stratifications (0- 4,5- 9,10-14,15-19,20-44,45-54,55-64,65-74,75-84,85+)

5

Please select Sex:

Female Only

6

Please select one or more Periods:

☐ 2000

☐ 2001

☐ 2002

☐ 2003

☐ 2004

☐ 2005

☐ 2006

☐ 2007

3

Please select a Setting:

Please select diagnosis setting

7

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

Note: Click a Data Mart name to view details (Metadata)

8

Finally, Submit Your Query By Clicking the Button Below:

Start This Query

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

Code Selection	<p>Select all the four-digit ICD-9-CM procedure codes that this query is based upon.</p> <p>There are two ways to select the codes:</p> <ul style="list-style-type: none">• Search by text string or code• 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. by clicking on the column header. <p>You can use both options to create your list.</p> <p>You can choose as many four-digit ICD-9-CM procedure codes to view as you want.</p> <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: outpatient, emergency department, or inpatient
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 (males only, females only, males and females, or no sex stratification).
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.

3.2.6 ICD-9 Procedures (3 Digit Codes)

When you select ICD-9 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.

The HMORN CERT DEcIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

ICD-9 Procedures

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, 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.
elizabeth_balaconis@harvardpilgrim.org

Select up to 10 three-digit ICD-9 procedure codes to view, select the specific periods and location of service to extract, 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 for the same procedure refer to unique healthcare encounters/visits. All queries return results stratified by age group and sex for each period and location of service selected.

2

2 Options to Select Codes (can use both)

Enter Code(s) or text to search

Search

Choose category...

(00) PROCEDURES AND INTERVENTIONS, NOT ELSEW

Select Codes from Search List

Codes Selected for this Query:

3

Please select a Setting:

Please select diagnosis setting

4

Please select an Age Stratification:

8 Stratifications (0- 4,5- 9,10-14,15-19,20-44,)

5

Please select Sex:

Female Only

6

Please select one or more Periods:

☐ 2000

☐ 2001

☐ 2002

☐ 2003

☐ 2004

☐ 2005

☐ 2006

☐ 2007

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 an ICD-9 Procedures query:

Code Selection	<p>Select all the three-digit ICD-9 procedure codes that this query is based upon.</p> <p>There are two ways to select the codes:</p> <ul style="list-style-type: none">• Search by text string or code• 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>You can use both options to create your list.</p> <p>You can choose up to 10 three-digit ICD-9 procedure codes to view.</p> <p>Click on Add Codes to add the selected codes to the list and display the list.</p>
Setting	<p>Select the care setting for the query: outpatient, emergency department, or inpatient.</p>
Age Stratification	<p>Select the required age stratification from the drop down menu.</p>
Sex Stratification	<p>Select a sex grouping from the drop down menu to specify the sex stratification for your results (males only, females only, males and females, or no sex stratification).</p>
Period	<p>Select one or more years. Check the box next to the year to include it in your query.</p>
DataMarts	<p>Select the DataMarts to submit your query to. Only the DataMarts that have data for the given Period are displayed.</p>

3.2.7 HCPCS Procedures (Healthcare Common Procedure Coding System)

When you select 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 Creating a Query above.

The HMORN CERT DECIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

HCPCS Procedures

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.
elizabeth_balaconis@harvardpilgrim.org

Five-digit HCPCS (CPT-4) procedure codes stratified by age group, sex, year, and location of service. To limit file size only a limited number of codes were included.

2

2 Options to Select Codes (can use both)
Enter Code(s) or text to search
Search
Choose category....
10000-10999
Select Codes from Search List
Codes Selected for this Query: *

4

Please select an Age Stratification: *
8 Stratifications (0- 4,5- 9,10-14,15-19,20-4)

5

Please select Sex: *
Female Only

6

Please select one or more Periods: *

2000

2001

2002

2003

2004

2005

2006

...

3

Please select a Setting: *
Please select diagnosis setting

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

22

Enter the following criteria for HCPCS Procedures query:

Code Selection Select all the five-digit HCPCS (CPT-4) procedure codes that this query is based upon.

There are two ways to select the codes:

- Search by text string or code
- 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.

You can use both options to create your list.

You can choose up to 5 HCPCS (CPT-4) procedure codes to view.

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

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

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 (males only, females only, males and females, or no sex stratification).

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.

3.2.8 Eligibility and Enrollment

When you select Eligibility and 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.

The HMORN CERT DECIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

Specify a Query

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

Eligibility and Enrollment

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.

elizabeth_balaconis@harvardpilgrim.org

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

2

Please select coverages:*

☐ Drug Coverage

☐ Medical Coverage

3

Please select an Age Stratification:*

8 Stratifications (0- 4,5- 9,10-14,15-19,20-4)

4

Please select Sex:*

Female Only

5

Please select one or more Periods:*

☐ 2000

☐ 2001

☐ 2002

☐ 2003

☐ 2004

☐ 2005

☐ 2006

☐ ----

6

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

Note: Click a DataMartname to view details (Metadata)

7

Finally, Submit Your Query By Clicking the Button Below:

Start This Query

Enter the following criteria for an Eligibility and Enrollment query:

Coverage	Select one or both of the coverage types that this query is based upon: Drug Coverage or Medical Coverage, using the check box.
Setting	Select the care setting for the query: outpatient, emergency department, or inpatient.
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 (males only, females only, males and females, or no sex stratification).
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.

3.3 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.

The HMORN CERT DECide Center Distributed Query ToolContact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

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.

elizabeth_balaconis@harvardpilgrim.org

Please select a file to Upload: *

Browse...Upload

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

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

☐ [HPHCI-VDW](#)

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 choose Browse button to select the file that you want to upload.
4. Click the Upload button.
5. Upload as many files as required.
6. Click the Distribute Query button.

3.4 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.

The HMORN CERT DEcIDE Center Distributed Query ToolContact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

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.

HCPCS Procedures

Name	ID	Submitted On	Submitted By	Status	Type
Testing 3	69	10/25/2010 3:27:16 PM	HPHC-DM Admin 3	0/1 Completed	HCPCS Procedures View Details
Aggregation	28	10/22/2010 9:46:44 AM	HPHC-DM Admin 3	Completed	HCPCS Procedures View Details
Aggregation	27	10/22/2010 9:43:59 AM	HPHC-DM Admin 3	Completed	HCPCS Procedures View Details

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.
4. Click on View Details to see query status by DataMart as shown on the View a Query screen in section 3.5 Viewing Query Results below. This displays a list of all the DataMarts to which you submitted the query along with status for each DataMart.
5. To filter the list of DataMarts by status, choose the status from the drop down menu. For example, to list only the DataMarts where your query is in progress, choose In Progress.

3.5 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 3.4 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 System 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 try to view results before all DataMarts have uploaded their results, you will not be able to view the results from those DataMarts. Viewing partial results freezes the query at that point. You will not be able to see any other results for that query from the DataMarts that did not respond. If you want information from those DataMarts, you must submit a new query.

The screenshot shows the 'View a Query' screen of the HMORN CERT DEcIDE Center Distributed Query Tool. The page has a red header with the tool's name and links for 'Contact Us' and 'Logout'. Below the header is a navigation bar with tabs for 'QUERIES', 'RESULTS', 'ADMINISTRATION', 'NETWORK', and 'NOTIFICATIONS'. The 'RESULTS' tab is selected. The main content area is titled 'View a Query' and contains the following text: 'This page allows you to view query **test ID 109** of type **Eligibility and Enrollment** submitted **10/29/2010 10:37:01 AM**. Click on "View Result" to view or export query results. Click "Refresh" to update query status.'

Below this text is a section titled 'DataMart Results' containing a table. The table has a header row with columns: 'DataMart', a dropdown menu set to 'All', 'Last Response', and 'Message'. There are two data rows, each with a checkbox in the first column.

DataMart		Last Response	Message
<input type="checkbox"/> HPHCI-Summary Tables	Completed	10/29/2010 10:38:09 AM	
<input type="checkbox"/> KP_LPeak-auto11	Completed	10/29/2010 3:21:00 PM	

At the bottom of the screen are two red buttons: 'View Result' and '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.

The HMORN CERT DECIDE Center Distributed Query Tool
Contact Us | Logout

QUERIES

RESULTS

ADMINISTRATION

NETWORK

NOTIFICATIONS

View Results

This page displays the results of your query.

Query Name: test

Submitted: 10/29/2010 10:37:01 AM

Query Text:

Select AgeGroup, gender as Sex, Year, DrugCov as DrugCoverage, MedCov as MedicalCoverage, Sum(Member) as Members From (SELECT Age_Group as AgeGroup, Sex as gender, Year, DrugCov, MedCov, Members as Member FROM Enrollment WHERE year IN ('2016','2017') AND DrugCov = 'Y' AND MedCov = 'Y' AND sex = 'F') as OuterTable Group by

Results From: HPHCI-Summary Tables
KP_LPeak-auto11

Export to: Excel

Export

AgeGroup	Sex	DrugCoverage	MedicalCoverage	Year	Members
0- 4	F	Y	Y	2016	1341
0- 4	F	Y	Y	2017	1308
5- 9	F	Y	Y	2016	1650
5- 9	F	Y	Y	2017	1605
10-14	F	Y	Y	2016	1866
10-14	F	Y	Y	2017	1887
15-19	F	Y	Y	2016	1494
15-19	F	Y	Y	2017	1659
20-44	F	Y	Y	2016	10086
20-44	F	Y	Y	2017	10131
45-64	F	Y	Y	2016	6297
45-64	F	Y	Y	2017	7014

3.6 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, the suffix -QueryResult, and the extension of the file type you chose. For example: NDC2002-QueryResult.xls.

3.7 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.

3.7.1 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 DataMarts cancelling your query request.

The screenshot shows the 'View a Query' page of the HMORN CERT DecIDE Center Distributed Query Tool. The page header includes the tool's name and links for 'Contact Us' and 'Logout'. Below the header are tabs for 'QUERIES', 'RESULTS', 'ADMINISTRATION', 'NETWORK', and 'NOTIFICATIONS'. The 'View a Query' section displays the query name 'Testing notifications ID 80' and its type 'HCPCS Procedures', submitted on '10/26/2010 3:13:44 PM'. A note indicates that clicking 'View Result' will view or export query results, and clicking 'Refresh' will update the query status. Below this is a 'DataMart Results' table with columns for 'DataMart', 'All', 'Last Response', and 'Message'. The table contains two rows: 'LPeak-auto1' with a status of 'Pending' and a red arrow icon, and 'HPHCI-Summary Tables' with a status of 'Completed' and a timestamp of '10/26/2010 3:21:57 PM'. At the bottom of the table are four buttons: 'Remove', 'Add', 'View Result', and 'Refresh'. The 'Remove' button is highlighted with a dashed box.

DataMart	All	Last Response	Message
<input checked="" type="checkbox"/> LPeak-auto1	Pending		
<input type="checkbox"/> HPHCI-Summary Tables	Completed	10/26/2010 3:21:57 PM	

3.7.2 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).

The HMORN CERT DecIDE Center Distributed Query Tool

Contact Us | Logout

QUERIES

RESULTS

ADMINISTRATION

NETWORK

NOTIFICATIONS

View a Query

This page allows you to view query **Testing notifications** ID **80** of type **HPCPS Procedures** submitted **10/26/2010 3:13:44 PM**.

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

DataMart Results

DataMart

All

Last Response

Message

☐ LPeak-auto1

Pending

☐ HPHCI-Summary Tables

Completed

10/26/2010 3:21:57 PM

Remove

Refresh

Select DataMart to Add to this query

☐ LPeak-auto2

Add

Cancel

4 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.

The HMORN CERT DECIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

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"/> Everyday	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.

SaveCancel

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.

5 Administering / Changing 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 HMORN CERT DEcIDE Center Distributed Query Tool

Contact Us | Logout

QUERIESRESULTSADMINISTRATIONNETWORKNOTIFICATIONS

User Administration

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

User Id: 71

Username:

HPHC ebalacon

Firstname:

Liz

Lastname:

Balaconis

Password:

(blank to leave unchanged)

Re-enter Password:

Title:

Email:

elizabeth_balaconis@r

Role:

Investigator

Organization:

Harvard Pilgrim Health Care Institute

Save

Cancel

5.1 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.

The HMORN CERT DECIDE Center Distributed Query Tool [Contact Us](#) | [Logout](#)

QUERIES RESULTS ADMINISTRATION NETWORK NOTIFICATIONS

User Administration

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

User Id: 71

Username:

Firstname:

Lastname:

Password:
(blank to leave unchanged)

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

Re-enter Password:

Title:

Email:

Role:

Organization:

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.

5.2 How to Update your E-mail

To update your E-mail address:

1. Access your user profile as described above.
2. Enter your new e-mail address in the box provided.
3. Click the Save button.

The HMORN CERT DEcIDE Center Distributed Query Tool

Contact Us | Logout

QUERIES

RESULTS

ADMINISTRATION

NETWORK

NOTIFICATIONS

User Administration

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

User Id: 71

Username:

HPHC ebalacon

Firstname:

Liz

Lastname:

Balaconis

Password:

(blank to leave unchanged)

Re-enter Password:

Title:

Email:

elizabeth_balaconis@h

Role:

Investigator

Organization:

Harvard Pilgrim Health Care Institute

Save

Cancel

6 Getting Help

If you have trouble accessing the Web Portal or your user account, click on the Contact Us link and describe your issue in the email to DRN@lincolnpeak.com to request help from the DRN Operations Center support staff.

6.1 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.

When I view my profile, why are the rights grayed out and how can I add them?

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