

**Azara Report Generation Tool: Ad-Hoc Reporting**

**for**

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**AD-HOC REPORTING**

**CPSI User Requirements:**

* Access to the following CPSI modules:
  + 01 Ozarks Community Hospital (aka Springfield Hospital)
  + 33 Gravette Hospital
  + 38 OCH Missouri RHC
  + 46 OCH Regional RHC
* Access to the following departments:
  + 090 Business Office
  + 011 Laboratory

**Ad-Hoc Reporting Requirement and Procedures:**

**Patients (AR/Medical Records):**

* **Select the following information fields to extract:**
* **Page 1:**
  + - 1 Patient Number [ARPNUM]
    - 2 Patient Name [ARPNAME]
    - 4 Address-1 [ARADDR1]
    - 5 Address-2 [ARADDR2]
    - 6 City [ARCITY]
    - 7 State [ARSTATE]
    - 8 Zip [ARZIP]
    - 9 Sex [ARSEX]
    - 10 Birth Date [ARBIRTH]
    - 11 Race [ARRACE]
    - 12 Phone [ARPHONE]
    - 13 SSN [ARSSN]
    - 20 Service Type [ARSERV]
    - 21 Patient Type [ARPTYPE]
    - 23 Discharge Date [ARDISDT]
* **Page 2:**
  + 42 Sub-Type [ARSUBTYP]
  + 52 Medical Record Number [ARMRNUM]
* **Page 3:**
  + 73 Church [ARCHURCH]
* **Page 5:**
  + 35 Expired Date [AREXPIRED]
* **Page 6:**
  + 31 ICD-9 Code 1 [DIAG01]
  + 32 ICD-9 Code 2 [DIAG02]
  + 33 ICD-9 Code 3 [DIAG03]
  + 34 ICD-9 Code 4 [DIAG04]
* **Page 8:**
  + 1 Carrier Code 1 [ARCAR1CD]
  + 4 Carrier Code 2 [ARCAR2CD]
* **Page 12:**
  + 11 Physician [ARPHYNM1]
* **Parameters:**
  + Set ***discharge date*** to date range required – this captures visits that cross over the 23:59 to 12:00 boundary of days and is the hospital reporting standard
  + When prompted by CPSI for a beginning and ending date range, ***DO NOT*** enter a date: these are AR posting dates, and will truncate patients from the beginning and ending of the month, due to the difference between Discharge Date and AR date. ***Just hit “enter”***.
* **Export data as an Excel spreadsheet and Save as:**
  + \\NEMESIS\Integrated Care\1 - PCC PCHH Azara Report Generator\1 – Holding Area for Raw Data\ ...*then filenames:*
    - **1 AR Raw Data 01 ...**(*for Hospital Module Extract*)
    - **1 AR Raw Data 01 ...**(*for Gravette Module Extract*)
    - **1 AR Raw Data 38** *...(for MO RHC Module Extract)*
    - **1 AR Raw Data 46 ...**(*for MO Regional RHC Module Extract*)

**Clinical (Patient, Item, Pharmacy Order, Patient Clinical Data and Hospital Defined):**

* **Patient:**
  + Patient Number [ARPNUM]
  + Patient Name [ARPNAME]
  + Medical Record Number [ARMRNUM]
  + Patient Type [ARPTYPE]
  + Patient Sub-Type [ARSUBTYP]
  + Patient Service Type [ARSERV]
  + Discharge Date [ARDISDT]
* **Item:**
  + Item Number [IVNUM]
  + Item Description [IVDESC]
  + CPT Code [IVM1CPT]
* **Parameters:**
  + Set ***discharge date*** to date range required – this captures visits that cross over the 23:59 to 12:00 boundary of days and is the hospital reporting standard
  + When prompted by CPSI for a beginning and ending date range, enter the beginning discharge date of the report range, followed by the date you are running the report. The date range from the pop-up calendar represents AR dates: by expanding the date range, no patients will be truncated from the desired data set.
* **Export data as an Excel spreadsheet and Save as:**
  + \\NEMESIS\Integrated Care\1 - PCC PCHH Azara Report Generator\1 – Holding Area for Raw Data\ ...*then filenames:*
    - **2 Clinical Raw Data 01 ...**(*for Hospital Module Extract*)
    - **2 Clinical Raw Data 38** *...(for MO RHC Module Extract)*
    - **2 Clinical Raw Data 46** *...(for MO Regional RHC Module Extract)*

**Insurance:**

* **Fields:**
  + Patient Account Number [ISNUM]
  + Patient Name [ISPNAME]
  + Insurance Company Code [ISCOMPCD]
  + Insurance Company Name [ISCONMANE]
  + Contract Number [ISCONTRAC]
* **Parameters:**
  + Set ***discharge date*** to date range required – this captures visits that cross over the 23:59 to 12:00 boundary of days and is the hospital reporting standard
  + Set financial class filters to **XB** and **XB2** to capture patients with Medicaid as a primary or secondary payer.
* **Export data as an Excel spreadsheet and Save as:**
  + \\NEMESIS\Integrated Care\1 - PCC PCHH Azara Report Generator\1 – Holding Area for Raw Data\ ...*then filenames:*
    - **3 Insurance Raw Data 01 ...**(*for Hospital Module Extract*)
    - **3 Insurance Raw Data 33 ...**(*for Gravette Module Extract*)
    - **3 Insurance Raw Data 38** *...(for MO RHC Module Extract)*
    - **3 Insurance Raw Data 46 ...**(*for MO Regional RHC Module Extract*)

**Laboratory:**

* Laboratory results are extracted from a specialized area of the Ad-Hoc reporting system. Follow the following procedures to access that area:
* Log into the module 01 (Springfield Hospital)
* Select “Patient Accounting”
* Select “Change Department” and then select 011 (Laboratory)
* Select “Other Applications and Functions”
* Select “Word Processing”
* Select “Ad-Hoc Report”
* Select “Select Data from CPSI files”
* Select “ Clinical”
* Select “Ancillary Order and Result”
* **Data Elements:**
  + **Page 1:**
    - Order Number [ORNUM]
    - Order Department [ORDEPT]
    - Completion D/T [ORCMPDTTM]
  + **Page 2:**
    - Patient Name [ARPNAME]
    - Patient Number [OR1ACCTNO] but pops as [ARPNUM]
    - Patient Type [OR1PATTYP]
    - Patient Sub-Type [OR1PSUBTP]
    - Item Number [IVNUM]
    - Item Description [IVDESC]
  + **Page 3:**
    - Select “Add Result”
    - Search for “HGB A1C”
    - Select “HGB A1C” *(must be the one in all caps that looks just like this)*
    - Repeat the process for “LDL”
* **Parameters:**
  + Set ***completion date*** to date range required.
* **Export data as an Excel spreadsheet and Save as:**
  + \\NEMESIS\Integrated Care\1 - PCC PCHH Azara Report Generator\1 – Holding Area for Raw Data\ ...*then filenames:*
    - **4 Laboratory Raw Data 01 ...**(*for Hospital Module Extract*)
    - **4 Laboratory Raw Data 33 ...**(*for Gravette Module Extract*)

**ICD-10 (*Updated process 3/24/16 by Matthew Smith):***

* Due to the implementation of ICD 10 codes in October of 2015, a new process to extract ICD 10 codes had to be implemented.
* Due to a CPSI update, we no longer have to run this report as ICD 10 is now reported through regular ad hocs, as per normal before the ICD 10 change (Updated 8/8/2016)

1. Log into Module 01 (Springfield Hospital)
2. Select “Other Applications and Functions”
3. Select “Word Processing”
4. Select “Ad Hoc Report”
5. Select “Report Dashboard”
6. Select “Medical records Disease Index – ICD 10”
7. Enter Discharge Date range
8. Change Output Format to “CSV”
9. Select “Run Report”

* Once report has finished compiling, some data manipulation will be required before we upload the file into the Report generator.

1. Highlight “icd10\_diag\_list” column (which should be column ‘Q’)
2. Select the Data Tab at the top of the page
3. Select “Text to Columns”
4. Select “Delimited” and click next
5. Check mark “semicolon”, “Comma” and “Space”. Tab is fine to leave checked as this will not affect anything in this scenario. Click Next
6. Click Finished
7. Rename “icd10\_diag\_list” to icd\_code\_1
8. Rename the proceeding columns icd\_code\_2, icd\_code\_3 etc…
9. Select “Save As”
10. Locate the “Holding Area for Raw Data” folder in the Integrated care folder
11. Click the “save as type” drop down box and select “Excel Workbook”
12. Save the file as 5 ICD 10 Patient Codes 01
13. Repeat Steps 2-11 in Module 38 (RHC module)
14. Rename the sheet tab to “Sheet1”.
15. Save the file as 5 ICD 10 Patient Codes 38

**Maintenance (*Updated process 3/24/16 by Matthew Smith):***

1. Log into Module 01 (Springfield Hospital)
2. Select “Other Applications and Functions”
3. Select “Word Processing”
4. Select “Ad Hoc Report”
5. Select “Point of Care”
6. Select “Report / Form” under the “Printing” Heading
7. Select “IC: PCHH Flowchart”
8. Click “Windows”
9. Enter in “Disc Date” under the “AR” Heading.
10. Click Excel to export into an excel file.
11. Save file as “6 Maintenance Flowchart Data” under

**Medications (*Updated process 03/28/2016 by Matthew Smith)***

* Due to CPSI upgrades, we are now able to pull NDC codes as well as medication start dates to be able to report on these measures. Like all the previous entries, a report is needed to be ran and extracted from CPSI and placed in the “1 – Holding Area for Raw Data” folder in the Azara report Generator Folder with the file name of “7 Patient Medications 01” and “7 Patient Medications 38”, respective of which module the report was extracted from.

1. Log into Module 01 (Springfield Hospital)
2. Select “Other Applications and Functions”
3. Select “Word Processing”
4. Select “Ad Hoc Report”
5. Select “Report Dashboard”
6. Select “Patient List with Clinical Data”
7. Enter Date range into the Admit Date Range boxes
8. Check “Exclude Communication Preference Section”, “Exclude Patient Problem Section” , “Exclude Patient Laboratory Tests and Values/Results Section” (Please note, that due to system upgrades, we may include this section to pull lab results later in the future. This will be updated if that happens), and lastly “Exclude Patient allergy Section”.

* *Checking these boxes are not essential to run the report, however, it will allow to report to be generated much quicker.*

1. In the “Output Format” drop box, select “CSV”
2. Click “Run Report”
3. Save the file as “7 Patient Medications 01” in 1 – Holding Area for Raw Data”.
4. Repeat steps 2 – 10 in RHC module (38)
5. Rename the sheet tab to “Sheet1”
6. Save the file as “7 Patient Medications 38” in 1 – Holding Area for Raw Data”.
7. Repeat steps 2 – 10 in RHC module (46)
8. Rename the sheet tab to “Sheet1”
9. Save the file as “7 Patient Medications 46” in “1 – Holding Area for Raw Data”.

**Data Mining (Updated 02/07/2017 by Matt Smith)**

* As of 02/07/2017, data mining is only available in facility 001. This report pulls information for BP Systolic, BP Diastolic, Height, Weight of the patient. Evident states that more functionality will be added in the future for more facilities and the ability to pull more Integrated Care related items such as PHQ/SBIRT Scores.

1. Log into Module 01 (Springfield Hospital)
2. Select “Other Applications and Functions”
3. Select “Word Processing”
4. Select “Ad Hoc Report”
5. Password “12903”
6. Select “Report Dashboard”
7. For first time use:
   * Click “Add”.
   * Select “Custom Reports” Tab at the top of the screen
   * Select “VITAL Report”
   * Click “Insert”
8. Double click “VITAL Report”
   * *Note: this may take a few minutes for it to populate with information.*
9. Once the information has been loaded, click “Config” in the navigation bar.
10. Put in the date range into the discharge date fields.
11. Click back button and the report will run again based on the date ranges.