ABC XXX
Portal Reports Guide

Version 3.xx

Document Revision History

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XXX	XXX	03/18/2014	XX	General Release
XXX	XXX	02/09/2014	XX	Initial Release

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C H A P T E R 1

Introduction

The *ABC® Portal Reports Guide* describes how to generate ABC-XX reports. This guide is written for ABC XXX portal users who work for your practice and have the proper authorization (User ID and Password) to log in and use the portal to generate XXX reports. Your System Administrator determines the rights and permissions needed to use this application.

This section provides a brief overview of the ABC XXX portal, the requirements needed to use the portal successfully, and how to access the portal.

Assumptions

This guide assumes that users have experience working with the following systems and software:

> Microsoft® Windows® operating systems

> Microsoft® Office applications

Requirements

The following are requirements you must have in place to access and use the ABC XXXs portal.

Workstation Requirements

To use the ABC XXX Portal successfully, make sure you have the following items installed and/or configured on your workstation:

> Microsoft® Windows 2008 SP4 or later, Microsoft® Windows XP SP2 or later, Microsoft® Vista

> Microsoft® .NET Framework 1.1 through 4.0 installed and any other subsequent security patches (available as downloads from Microsoft)

> Microsoft® Internet Explorer® 7.0 to 9.0 and higher with 128-bit Secure Socket Layers (SSL) encryption

> Microsoft Excel® for Office 2000 or higher, and/or Adobe® Acrobat® Reader 6.0 or higher

To determine if your browser supports 128-bit encryption, click **Help** on your browser's toolbar and then click **About**. If your browser does not support 128-bit encryption, please visit the Web site that provides upgrades to your browser software.

Internet Security

Here are some suggestions to help protect your privacy and keep your information secure:

> Do choose a password that is easy for you to remember but difficult for others to guess. Passwords are case sensitive and should contain a combination of alphabet, numeric value, special characters and, the length of the password should be at least seven characters.

> Do not save the password if prompted. Some Web browsers prompt you to save user names and passwords for various sites on the Internet. This feature can be useful, but can put your personal information at risk. If possible, you should disable this option so no one can log in as you.

> Do remember to completely logout when you leave your computer, especially if you use a public or shared computer. Sign out completely at the end of each session by clicking the **Logout** link. Doing this removes the possibility that another person could use the same computer to view the contents of your account. Where possible, delete the Web browser's cache and cookies. The cache maintains a copy of web pages that have been viewed recently.

> Do keep your anti-virus programs up-to-date and make use of a firewall. Computers are vulnerable to viruses or online attacks that seek to intercept sensitive information provided through the Internet. An up-to-date anti-virus program and firewall help protect your computer and private information.

> Do not leave your computer unattended while you are logged in. If you have to leave your computer, log out of all programs and close all windows that might display sensitive information. The ABC XXX Web Portal automatically logs you out if there has been no online activity for several minutes.

> Do use unique passwords whenever changing your password. If you do not regularly change your password, your password expires every six months.

Overview

The ABC XXXs Reporting Module is a clinical data repository used for automatic registry reporting of clinical outcomes and quality measure data required by pay-for-performance (P4P) programs.

What is ABC XXXs?

ABC XXXs application is designed to seamlessly extract patient data from your ABC Report Server and allow report generation for organizations that offer performance based incentives. The ability to submit reports directly is available for certain organizations but not all of these organizations and are denoted on the program list with an asterisk (*). Some examples of currently supported programs are:

> Bridges to Excellence (BTE)*

> Physician Quality Reporting System (PQRS)*

> Electronic Prescribing Incentive Program (eRx)*

> Meaningful Use (MU)

How ABC XXX Works?

A ABC XXX client agent (a Windows-based service) that is installed on your ABC database server is used for reporting and monitoring changes and additions on your system. The Windows-based service then extracts any qualified data and sends it to the ABC XXX Portal Server. The data is then evaluated and formatted into practice and provider feedback reports. Registered users can access these reports to monitor their performance by logging in to the XXX Portal. On a periodic basis (set by each Measures Program organization), the data is electronically sent to the appropriate organization upon client approval, which then processes the information to determine the incentives for participating providers.

The data is extracted with a 14-day lag from the current date to ensure all information has been entered by the user into an encounter prior to extraction which is configurable. In addition, XXX implements a 4-day waiting period on reprocessing as some processing may take from several hours to several days to complete, depending on the complexity of measures that have been selected.

Accessing the XXX Reporting Portal

Once you have set up a XXXs account and have been set up as a user by your System Administrator you can access the ABC XXXs portal.

To log in to the ABC XXXs portal:

1 Launch your web browser.

2 Type https://XXXwebprod.ABCisp.com in your web browser's address bar.

The ABC XXXs portal *Log In* page displays.

3 Enter your registered **Email** or **User name** and then **Password** in the fields provided.

Note: If you cannot remember your password, refer to Forgot Password.

4 Click **Log In**.

The *Home* page displays.

Forgotten Password

If you forget your password, you can have a password sent to your email address.

To retrieve your password:

1   Launch your web browser.

2   Type https://XXXwebprod.ABCisp.com in your web browser's address bar.

The ABC XXXs portal *Log In* page displays.

3   Click the **Forgot Password?** link.

The *Forgot Your Password* page displays.

4   Enter your **Email** or **User Name** and click **Send**.

Your password is sent to your registered email account.

Open the email and follow the instructions in the email to retrieve your password.

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CHAPTER 2

Updating Your Profile

Your profile contains your First and Last Names, Username, a unique Email Address and Password.

To update your user profile:

1   Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

2   Click the **Edit** button.

Your user setting page displays.

3   If needed, update the following fields:

> **First Name**
> **Last Name**
> **Email Address**

Note: You can also click the link displaying your name and user access to update your profile.

Changing Your Password

There are two ways to change your password. You can change password from your Profile page or from the Home page.

To change your password from your Profile page:

1   Access your profile (see "Updating Your Profile" on page 13).

2   Enter your password in the **New Password** field.

3   Re-enter your new password in the **Confirm New Password** field.

Note: Choose a password that is easy for you to remember but difficult for others to guess. Passwords are case sensitive and should contain a combination of alphabet, numeric value, special characters and the length of the password should be at least seven characters.

4   Click **Save**.

A message displays indicating that your password has been successfully changed.

To change your password from the *Home* page:

1   Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

The *Home* page displays.

2   Click **Change Password**.

The *Change Your Password* page displays.

3   Enter your current password.

4   Enter your new password.

5   Confirm your new password.

6   Click **Change Password** to save your changes.

A confirmation message displays indicating that your password has been changed.

Logging Out

To exit the ABC XXXs Portal, click the **Logout** link located in the upper right of the Web page.

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CHAPTER 3

Reports

This section describes how to generate, save, edit and delete reports for ABC XXXs portal.

Individual Details Report

The *Individual Details Report* enables you to review all patient related encounter data for a patient. If needed, you can generate an *Individual Details Report* by entering the patient's ABC Ambulatory EHR person number.

To generate an Individual Details report:

1 Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

2 On the *Home* page, click the **Individual Details** link.

The *Individual Details Report* page displays.

3 Enter the person number and click the **Show Report** button**.**

The *Individual Details Report* displays.

See sections Exporting Reports (on page 23) or Printing Reports (on page 24) for more details on how to export or print the report.

Note: XXX Encounter Number is specific to ABC XXX and is not similar to the ABC Ambulatory EHR Encounter number.

Individual Measures Report

The *Individual Measure Report* enables you to review the measures of a patient that is included as performance met, treatment opportunity or a provider that has been configured for a measure. To generate an *Individual Measure Report*, you need to enter the patient's ABC Ambulatory EHR person number.

To generate an Individual Measures report:

1 Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

2 On the *Home* page, click the **Individual Measures** link.

The *Individual Measures* page displays.

3 Enter the **Person Number** and click the **Show Report** button.

The *Individual Measures* report displays.

See sections Exporting Reports (on page 23) or Printing Reports (on page 24) for more details on how to export or print the report.

Generating Reports

When generating reports, you can filter the data by selecting the options such as report type (Detail, Summary, etc.), program (BTE etc.) and measure period. You can save the reports by exporting the reports in several formats including .pdf and .xlsx or .xls.

To generate a report:

1   Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

2   From your *Home* page, click the **Quality Program Reports** link.

The *Reports* page displays.

3   Select a report from the list of reports.

4   Based on the report you select, click the filters (Program, Measure, Practice, etc.) and make your selections. Once you click the filters, a green check mark appears next to the corresponding filter.

Note: Filter options vary according to the report type selected.

5   After making all your selections, click the **Generate Report** button.

The report according to your selection displays.

The Measure Rate consists of a numerator and a denominator. The Denominator is the patient population for the given measure. The Numerator is the eligible clinical cases or patients who satisfied the criteria for the given measure. There are also Exclusion possibilities which removes the patient from the measure count.

Note: - Indicates that the performance was within + or - 3% from the goal.

 - Indicates that the performance was less than 3% from the goal.

 - Indicates that the performance was greater than 3% from the goal.

6   To save the report filters for fast recall, click **Memorize Report** .

7   A Memorize *Report* dialog box to enter the report name displays.

8   Enter the report name and click **Memorize Report**.

Report Options

There are seven report options available for you to generate based on your needs:

Report Type	Report Description
Summary Report	Shows the percentage and the counts for a given measure, one measure at a time displayed in tabular format. This report is recommended for Meaningful Use attestation and provider level program reports.
Measure Summary Report	Shows a percentage summary of measures met by the practice, in Matrix format and does not include Exclusions.
Provider Dashboard	Shows gages of a practice's performance per measure. This can be drilled down by provider to show individual provider results.
Individual Practices	Shows a patient by patient view of the practice and providers status per measure. This can be drilled down by status to see *Provider Patient Report* for a specific provider measure status.
Measure Goal Report	Shows the percentage of measure goals met based on the measure goal settings set up by the Client Admin user.
Provider Patient Report	Shows all the details of the patient along with their provider details. This report can be drilled down by person number to see the *Individual Details Report* or, by measure to see specific patient's clinical data.
Summary Report (Old)	Shows an old Summary Report which displays the percentage and counts for a given measure, one measure at a time displays in tabular format.
Practice Summary Report	Shows the aggregate count of patients for GPRO reporting
Practice Patient Report	Shows the detail reporting of patients for GPRO
ASC Aggregate Report	Shows the details of the practice, organ system, along with the total count of the procedure category.
CPCI Summary Report	Shows the CPCI practice location summary report.

Viewing Reports in Expanded Mode

When you generate a report with multifaceted results, such as multiple numerators and denominators, or multiple patient criteria, you have the ability to expand or collapse the information based on your viewing needs.

By default, when you generate a report, the measures are expanded. In this state, a summary of the measures is viewable.

Flexible Date Reports

The Flexible Date Reports link is available only on request.

Reference: For information on how to activate the **Flexible Date Reports** link, refer to the *ABC XXX Client Implementation Guide*.

Configuration

The **Configuration** tab helps with configuring a new request for participating programs, participating measures and custom date ranges for evaluation. You can request a job to process flexible date range reports.

Note: You can only select a program and measure that you are participating currently.

To configure reports:

1 Log on to ABC XXXs portal.

2 On the *Home* page, click the **Flexible Date Reports** link.

The following reports page displays.

3 Select the practice from the **Practice** list.

4 Select the provider from the **Provider** list.

5 Select the program from the **Program** list.

Based on the selection, the *Measures* section displays the measures.

6 Select the measures from the *Measures* section you want to generate reports or click **all** to select all the measures.

7 Select the **Start Date**.

8 Select the **End Date**.

9 Click **Add**.

Note: You can add more request in the **Configuration** tab if needed, after you have selected the initial request.

10 Click the toggle button next to the **practice/program/measure** to view the details.

11 Click **Request Report**.

Report Jobs

The **Reports Jobs** tab allows you to view any pending or complete jobs that were requested.

1 Click on **Report Jobs** to view the status of the request.

2 Once the evaluation is completed the **Pending** status is changed to **Complete** status.

3 If you no longer want to run a specific job or would like to delete old jobs, select the check box corresponding to the job request that you want to delete.

4 Click **Delete**.

Reports

When you click on the **Complete** link corresponding to the Job Number the report displays in the **Reports** tab.

1 Click on the **Complete** link corresponding to the Job request on the **Report Jobs** tab.

   The **Reports** tab is displayed with the report for the selected Job request.

2 To view the report for a different job number, you can select the job number from the **Job#** list.

3 Select the **Practice**, **Provider** and the **Program**.

4 Select the **Measures** to be displayed.

5 Enter the **Reporting Period**.

6 To change the view of the report, you can select the required view criteria from the **Group columns** list.

   Note: You can also change the filter criteria by selecting the required option from each column's filter options.

7 Click **Generate Report**.

   The requested report displays.

   Note: Select the **Only show patient having an encounter during reporting period** check box when you want to view the report that has encounters within the entered reporting period. Or else, all the reports are displayed irrespective of the entered reporting period.

8 Click the ⊠ button to export the report into excel document format.

Individual Detail Report

The **Individual Detail Report** tab displays the report for individual Job requests.

1 Click on the **Person Number** link on the **Reports** tab for the corresponding Job request.

The **Individual Detail Report** tab displays the report for the selected person number.

2 To view the *Individual Detail Report* for a different person number enter the **Person Number**.

3 Click **Generate Report**.

Viewing Memorized Reports

You can view memorized report filters for reports that you have generated to easily view the reports with the selected filters again. The memorized report filters can be edited or deleted.

To view a report that you saved:

1 Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

2 From your *Home* page, click the **Quality Program Reports** link.

The *Quality Program Reports* page displays.

3 Click the **View Memorized Reports** button.

A list of saved reports displays.

Note: The **View Memorized Reports** button is only available if the previous reports have been saved.

4 Click a column header to sort the results in ascending or descending order.

5 Click a report name to view it.

Editing Memorized Reports

You can edit a report that you have previously memorized.

To edit a report that you saved:

1 Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

2 From your *Home* page, click the **Quality Program Reports** link.

The *Quality Program Reports* page displays.

3 Click the **View Memorized Reports** button.

A list of saved reports displays.

4 Next to the report you want to update, click **Edit**.

The *Reports* page displays.

5 Change your filters (Report, Program, Measure, etc.) as needed.

6   Click the **Update** link.

A confirmation dialog box displays.

7   Click **Update Report**.

The message indicating that the report is updated successfully, displays.

Deleting Saved Reports

You can delete previously memorized reports.

To delete a report that you saved:

1   Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9).

2   From your *Home* page, click the **Quality Program Reports** link.

The *Quality Program Reports* page displays.

3   Click the **View Memorized Reports** 📊 button.

A list of saved reports displays.

4   Next to the report you want to delete, click **Remove**.

A confirmation message displays.

5   Click **OK**.

Exporting Reports

You can export a report that you are currently working on or have previously memorized.

To export a report:

1   Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9) and generate a report (see "Generating Reports" on page 18).

2   On the report option toolbar, click the **Export** 📊▾ button

3   Select one of the following formats to export your report to:

> **.xml file with report data**
> **.csv (comma delimited)**
> **.pdf**
> **.mhtml (web archive)**
> **.xls or .xlsx**
> **.tiff**
> **.doc or .docx**

The *File Download* dialog box displays.

4   Click **Save**.

The *Save As* dialog box displays.

5   If needed, change the file name, browse and select a location.

6   Click **Save**.

Printing Reports

You can print a report that you are currently working on or have previously memorized.

To print a report:

1 Log on to ABC XXXs portal (see "Accessing the XXX Reporting Portal" on page 9) and generate a report (see "Generating Reports" on page 18).

2 On the report option toolbar, click the **Print** button.

3 If prompted, install **SQL Server Reporting Services 2008** to generate the printout.

The *Print Dialog* box displays.

4 Select a printer and any other option as needed.

5 Click **OK**.

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