

**Sarasota Memorial Health Care System**

**MCCM Best Practices**

**Maximizing Crystal Reporting with  
Business Objects Distribution**

Presented by:

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**SMHCS FACTS & FIGURES**

- Regional medical center and 806-bed community hospital
- Second-largest acute care public hospital in Florida
- 2014 US News Top 5 for Overall Care in Fla

|                                                                                   |                            |
|-----------------------------------------------------------------------------------|----------------------------|
| • Average length of stay: 4.7 days                                                | • Adult admissions: 25,590 |
| • Emergency registrations: 77,000<br>(one of busiest ERs on Florida's west coast) | • Births: 3,500            |
| • Outpatient registrations: 370,000                                               | • Physicians on staff: 775 |
|                                                                                   | • Staff: 4,000             |

Network of Services Located Throughout the Region

|                                                                                                                          |                                        |
|--------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| • Institute for Advanced Medicine –<br><i>includes HealthFit, the area's<br/>first medically oriented fitness center</i> | South County Regional Campuses         |
| • Heart & Vascular Institute                                                                                             | -Venice Walk-in Clinic                 |
| • Waldemere Breast Health Center                                                                                         | -North Port Emergency Room & Campus    |
| • Walk-In Center at Gulf Gate                                                                                            | North County and Manatee Campuses:     |
| • Blackburn Point Care Center                                                                                            | • University Parkway Care Center       |
|                                                                                                                          | • Walk-In Center at University Parkway |
|                                                                                                                          | • Heritage Harbor Outpatient Center    |

**3 Time Magnet Recognition!!**



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## Items of Discussion Areas of Reports

- **Census Reports**
  - CM Unit Worklists (also supported by MCCM Reviewer Worklists)
  - Insurance-Current and D/C by Payer
  - Observation/ Same Day Surgery Lists
- **Regulatory/Finance/Resource Usage**
  - Medicare SNF/ 1 Day LOS Audits
  - Outliers (>5 Day LOS and/or > 100K in charges)
  - 2 Midnight Rule
  - Payer Clinical Fax Reports (also supported by MCCM Reviewer Worklists)
- **Process Related**
  - Updating Missing DRG
  - CDI Reviews and WDRG/DRG match mismatch



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## Items of Discussion Report Distribution

- **Scheduling**
  - Daily
  - Weekly
  - Weekends
  - By Event?
- **Distributing reports**
  - Print
  - Email
    - "[PGP]" encryption
    - TSI Encryption
  - File Folders
    - Department
    - Upload folder for HL7
  - Fax Server



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## Over 100 Scheduled Reports

**CENTRAL MANAGEMENT CONSOLE**

Instance Manager Welcome: Administrator | Help | Preferences | About | Log Out

Manage • Actions • Organize

| Title                                                     | Type            | Status    | Folder Path     | Owner | Con | Next Run Time         | Submit  | Start Time | Duration (sec) | Recurrence                                                            |
|-----------------------------------------------------------|-----------------|-----------|-----------------|-------|-----|-----------------------|---------|------------|----------------|-----------------------------------------------------------------------|
| Daily Discharged United Medicare Commercial Excel.rpt     | Microsoft Excel | Recurring | Folders\W Admin |       |     | Jul 15, 2014 6:43 AM  | May 7,  |            |                | Report will run every week on the following days: Tuesday, Wednesday  |
| Daily Discharged United Medicare Commercial.rpt           | Adobe Acrobat   | Recurring | Folders\W Admin |       |     | Jul 15, 2014 6:53 AM  | Feb 11, |            |                | Report will run every week on the following days: Tuesday, Wednesday  |
| Daily LOS Greater Than 5 Days                             | Crystal Report  | Recurring | Folders\W Admin |       |     | Jul 15, 2014 7:39 AM  | Jan 16, |            |                | Report will run every week on the following days: Monday, Tuesday, Wi |
| DC Patients Med Nec Not Reviewed from Over Weekend.rpt    | Microsoft Excel | Recurring | Folders\W Admin |       |     | Jul 21, 2014 8:14 AM  | Dec 21, |            |                | Report will run every week on the following days: Monday              |
| DC Patients Med Nec Not Reviewed from Yesterday.rpt       | Microsoft Excel | Recurring | Folders\W Admin |       |     | Jul 15, 2014 8:13 AM  | Dec 21, |            |                | Report will run every week on the following days: Tuesday, Wednesday  |
| DC to SNF w LOS Less Than 4 days over last 7 Days UNC.rpt | Adobe Acrobat   | Recurring | Folders\W Admin |       |     | Jul 16, 2014 9:54 AM  | Dec 12, |            |                | Report will run every week on the following days: Wednesday           |
| Discharge with WDRG Place Hold.rpt                        | Microsoft Excel | Recurring | Folders\W Admin |       |     | Jul 14, 2014 11:06 PM | Mar 12, |            |                | Report will run every week on the following days: Sunday, Monday, Tue |
| DRG 999 Update.rpt                                        | Microsoft Excel | Recurring | Folders\W Admin |       |     | Jul 15, 2014 4:50 AM  | Sep 16, |            |                | Report will run every week on the following days: Sunday, Monday, Tue |
| FINAL DRG Correct or Neither Correct Release Hold.rpt     | Microsoft Excel | Recurring | Folders\W Admin |       |     | Jul 14, 2014 11:16 PM | Mar 11, |            |                | Report will run every week on the following days: Sunday, Monday, Tue |
| Freedom and Optimum Discharge Date Over Last Two Days.rpt | Crystal Report  | Recurring | Folders\W Admin |       |     | Jul 16, 2014 7:50 AM  | Nov 1,  |            |                | Report will run every week on the following days: Wednesday, Friday   |
| Freedom and Optimum Discharge Date Over Weekend.rpt       | Crystal Report  | Recurring | Folders\W Admin |       |     | Jul 21, 2014 7:57 AM  | Nov 1,  |            |                | Report will run every week on the following days: Monday              |
| Healthcare/Staywell Discharge Date Over Last Two Days.rpt | Adobe Acrobat   | Recurring | Folders\W Admin |       |     | Jul 16, 2014 6:42 AM  | Feb 19, |            |                | Report will run every week on the following days: Wednesday, Friday   |
| Healthcare/Staywell Discharge Date Over WER.rpt           | Adobe Acrobat   | Recurring | Folders\W Admin |       |     | Jul 21, 2014 6:41 AM  | Feb 13, |            |                | Report will run every week on the following days: Monday              |
| Inhouse ADM Review Not completed Last Three Days.rpt      | Microsoft Excel | Recurring | Folders\W Admin |       |     | Jul 15, 2014 7:10 AM  | Dec 20, |            |                | Report will run every week on the following days: Monday, Tuesday, Wi |

Total: 110 objects

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HEALTH CARE SYSTEM

## Sample- One Day's Total (145 Reports)

Manage • Actions • Organize

| Title                                                   | Type            | Status  | Folder Path                                                            | Owner | Con                  | Next Run             | Submit Time | Start Time           | Duration (sec) | Recurrence | Expiry | Server                 |
|---------------------------------------------------------|-----------------|---------|------------------------------------------------------------------------|-------|----------------------|----------------------|-------------|----------------------|----------------|------------|--------|------------------------|
| DRG 999 Update.rpt                                      | Microsoft Excel | Success | Folders\NCON Reports\User Reports\UNC Reports\DRG 999 Update Admin     | Jul   | Jul 16, 2014 4:50 AM | Jul 16, 2014 4:50 AM | 50          | Jul 17, 2014 4:50 AM |                |            |        | MCAPAP01.CrystalReport |
| RAC DRG 999.rpt                                         | Microsoft Excel | Success | Folders\NCON Reports\User Reports\UNC Reports\RAC DRG 999 Admin        | Jul   | Jul 16, 2014 5:10 AM | Jul 16, 2014 5:10 AM | 34          | Jul 17, 2014 5:10 AM |                |            |        | MCAPAP01.CrystalReport |
| Sunshine Medicaid Current Census Prod                   | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\Sunshine M Admin       | Jul   | Jul 16, 2014 6:23 AM | Jul 16, 2014 6:23 AM | 181         | Jul 17, 2014 6:23 AM |                |            |        | MCAPAP01.CrystalReport |
| Charter Gulf Navigator DC Overnight CE.rpt              | Crystal Report  | Success | Folders\NCON Reports\User Reports\Insurance RPT\SNH Insurance Admin    | Jul   | Jul 16, 2014 6:27 AM | Jul 16, 2014 6:27 AM | 5           | Jul 17, 2014 6:27 AM |                |            |        | MCAPAP01.CrystalReport |
| Daily Census United Medicare Commercial Excel.rpt       | Microsoft Excel | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\United Health Admin    | Jul   | Jul 16, 2014 6:33 AM | Jul 16, 2014 6:33 AM | 21          | Jul 17, 2014 6:33 AM |                |            |        | MCAPAP01.CrystalReport |
| Daily Census United Medicare Commercial Excel.rpt       | Microsoft Excel | Success | Folders\NCON Reports\User Reports\CON RPT\B Scheduled Lists D Admin    | Jul   | Jul 16, 2014 6:34 AM | Jul 16, 2014 6:34 AM | 27          | Jul 17, 2014 6:34 AM |                |            |        | MCAPAP01.CrystalReport |
| Census list for 60VT and XXVT to 6 WTT printer.rpt      | Crystal Report  | Success | Folders\NCON Reports\User Reports\CON RPT\B Scheduled Lists D Admin    | Jul   | Jul 16, 2014 6:36 AM | Jul 16, 2014 6:36 AM | 35          | Jul 17, 2014 6:36 AM |                |            |        | MCAPAP01.CrystalReport |
| Blue Cross Current Patients .rpt                        | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\Blue Cross Admin       | Jul   | Jul 16, 2014 6:40 AM | Jul 16, 2014 6:40 AM | 38          | Jul 17, 2014 6:40 AM |                |            |        | MCAPAP01.CrystalReport |
| Healthcare/Staywell Discharge Date Over Last Two Days   | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\Healthcare Admin       | Jul   | Jul 16, 2014 6:42 AM | Jul 16, 2014 6:42 AM | 3           | Jul 18, 2014 6:42 AM |                |            |        | MCAPAP01.CrystalReport |
| Amnargroup Discharge Date Over Last Two Days.rpt        | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\Amnargroup Admin       | Jul   | Jul 16, 2014 6:43 AM | Jul 16, 2014 6:43 AM | 3           | Jul 18, 2014 6:43 AM |                |            |        | MCAPAP01.CrystalReport |
| Daily Discharged United Medicare Commercial Excel.rpt   | Microsoft Excel | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\United Health Admin    | Jul   | Jul 16, 2014 6:43 AM | Jul 16, 2014 6:43 AM | 12          | Jul 17, 2014 6:43 AM |                |            |        | MCAPAP01.CrystalReport |
| Colleen Daily LOS Greater Than 20 Days                  | Crystal Report  | Success | Folders\NCON Reports\User Reports\CON RPT\Supervisor RPT\Col Admin     | Jul   | Jul 16, 2014 6:43 AM | Jul 16, 2014 6:43 AM | 13          | Jul 17, 2014 6:43 AM |                |            |        | MCAPAP01.CrystalReport |
| Blue Cross Discharge Patients .rpt                      | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\Blue Cross Admin       | Jul   | Jul 16, 2014 6:44 AM | Jul 16, 2014 6:44 AM | 10          | Jul 17, 2014 6:44 AM |                |            |        | MCAPAP01.CrystalReport |
| Aetna Discharge Date Over Last Two Days.rpt             | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\Aetna Admin            | Jul   | Jul 16, 2014 6:44 AM | Jul 16, 2014 6:44 AM | 3           | Jul 18, 2014 6:44 AM |                |            |        | MCAPAP01.CrystalReport |
| Daily Discharge United Medicare Excel Discharge.rpt     | Microsoft Excel | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\United Health Admin    | Jul   | Jul 16, 2014 6:44 AM | Jul 16, 2014 6:44 AM | 12          | Jul 17, 2014 6:44 AM |                |            |        | MCAPAP01.CrystalReport |
| Memorize with Final DRG for Discharges Over Last 2 Days | Crystal Report  | Success | Folders\NCON Reports\User Reports\CON RPT\ Scheduled Reports- Pk Admin | Jul   | Jul 16, 2014 6:45 AM | Jul 16, 2014 6:45 AM | 15          | Jul 17, 2014 6:45 AM |                |            |        | MCAPAP01.CrystalReport |
| SNH and Charter Health Current Inhouse                  | Microsoft Word  | Success | Folders\NCON Reports\User Reports\Insurance RPT\UNC RPT\SNH Admin      | Jul   | Jul 16, 2014 6:47 AM | Jul 16, 2014 6:47 AM | 5           | Jul 17, 2014 6:47 AM |                |            |        | MCAPAP01.CrystalReport |
| VA Discharge Date Over Last Two Days.rpt                | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\VA/VA Died Admin       | Jul   | Jul 16, 2014 6:48 AM | Jul 16, 2014 6:48 AM | 3           | Jul 18, 2014 6:48 AM |                |            |        | MCAPAP01.CrystalReport |
| MR DRG 999 Update.rpt                                   | Microsoft Excel | Success | Folders\NCON Reports\User Reports\UNC Reports\MR DRG 999 Up Admin      | Jul   | Jul 16, 2014 6:48 AM | Jul 16, 2014 6:48 AM | 15          | Jul 17, 2014 6:48 AM |                |            |        | MCAPAP01.CrystalReport |
| Daily Census United Medicare Commercial.rpt             | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\United Health Admin    | Jul   | Jul 16, 2014 6:49 AM | Jul 16, 2014 6:49 AM | 6           | Jul 17, 2014 6:49 AM |                |            |        | MCAPAP01.CrystalReport |
| Daily Census United Medicaid.rpt                        | Adobe Acrobat   | Success | Folders\NCON Reports\User Reports\FAX INSURANCE\United Health Admin    | Jul   | Jul 16, 2014 6:49 AM | Jul 16, 2014 6:49 AM | 8           | Jul 17, 2014 6:49 AM |                |            |        | MCAPAP01.CrystalReport |

Total: 145 objects

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HEALTH CARE SYSTEM

## Unit Census Reports

Select A Report To Run

- A Census Worklists Use this Folder**
- Census list enter units 2014.rpt
  - Census list for 3NW and 4NW 2014 TEST.rpt
  - Census list for 3NW and 4NW 2014.rpt
  - Census list for 4 Crit Tower 2014.rpt
  - Census list for 4CYT 2014.rpt
  - Census list for 5 Crit Tower 2014.rpt
  - Census list for 5CYT 2014.rpt
  - Census list for 5ET 2014.rpt
  - Census list for 5ET 6ET 2014.rpt
  - Census list for 5WT 2014.rpt
  - Census list for 6CYT 2014.rpt
  - Census list for 6ET 2014.rpt
  - Census list for 6WT 2014.rpt
  - Census list for 6WT and 7WT 2014.rpt
  - Census list for 7CYT 2014.rpt
  - Census list for 7ET 2014.rpt
  - Census list for 7WT 2014.rpt
  - Census list for 7WT and 8WT 2014.rpt
  - Census list for 8CYT 2014.rpt
  - Census list for 8ET 2014.rpt
  - Census list for 8WT 2014.rpt
  - Census list for 9CYT 2014.rpt
  - Census list for 9WT 2014.rpt

Have one folder for the CM's to run their own and another for scheduled reports.  
\*\* Do not give access to the Scheduled Reports-when a scheduled report is run manually, it can cause another instance to run



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## Business Objects Set Up For Print Report

Default Settings: Census list for 7WT.rpt

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|--------|-------------------------|----------------|----------------|---------|-----------|-----------------------|------|--------|---------------|--------------|----------------------------------------------------------------|------------------|----|----------------|-------------------|---------|--------------------|----------------|-------------------|------------------|------------------------------------------------------------------------------------------------|----------|------------------------------------------------------------------------|----------|-----------------|-------------|---------------|
| <ul style="list-style-type: none"> <li>Default Settings</li> <li>Recurrence</li> <li>Schedule For</li> <li>Notification</li> <li>Database Config</li> <li>Filters</li> <li>Format</li> <li>Destination</li> <li><b>Print Settings</b></li> <li>Events</li> <li>Scheduling Service</li> <li>Viewing Server</li> <li>Extensions</li> <li>Thumbnail</li> <li>Properties</li> <li>Categories</li> <li>Schedule</li> <li>User Security</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p><b>Print Settings</b></p> <p>Please select a print mode in Web viewer</p> <p> <input type="radio"/> Always print to PDF<br/> <input checked="" type="radio"/> Follow Crystal Reports preference setting         </p> <p><input checked="" type="checkbox"/> Print Crystal reports when scheduling</p> <p>You can use the default printer or specify a printer:</p> <p> <input type="radio"/> Default printer<br/> <input checked="" type="radio"/> Specify the printer: \\P_GUTENBERG\WT7CASEM<br/>         Input the printer name       </p> <p>1 Number of Copies: Page Range: All</p> | <p>Add DB Logon/Printer path and Schedule Instances</p> |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| <p><b>Instance Details</b></p> <table border="1"> <tr> <td>Title:</td> <td>Census list for 7WT.rpt</td> </tr> <tr> <td>Document Type:</td> <td>Crystal Report</td> </tr> <tr> <td>Status:</td> <td>Recurring</td> </tr> <tr> <td>External Destination:</td> <td>None</td> </tr> <tr> <td>Owner:</td> <td>Administrator</td> </tr> <tr> <td>Folder Path:</td> <td>MCM Reports/User Reports/ICM RPT/B Scheduled Lists Do not Use/</td> </tr> <tr> <td>Remote Instance:</td> <td>No</td> </tr> <tr> <td>Creation Time:</td> <td>7/16/2014 8:09 AM</td> </tr> <tr> <td>Expiry:</td> <td>3/17/2021 12:00 AM</td> </tr> <tr> <td>Next Run Time:</td> <td>7/18/2014 7:08 AM</td> </tr> <tr> <td>Recurrence Type:</td> <td>Report will run every week on the following days: Monday, Tuesday, Wednesday, Thursday, Friday</td> </tr> <tr> <td>Printer:</td> <td>Print the instance to the following printer: "\\P_GUTENBERG\WT7CASEM".</td> </tr> <tr> <td>Formats:</td> <td>Crystal Reports</td> </tr> <tr> <td>Parameters:</td> <td>No Parameters</td> </tr> </table> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                         | Title: | Census list for 7WT.rpt | Document Type: | Crystal Report | Status: | Recurring | External Destination: | None | Owner: | Administrator | Folder Path: | MCM Reports/User Reports/ICM RPT/B Scheduled Lists Do not Use/ | Remote Instance: | No | Creation Time: | 7/16/2014 8:09 AM | Expiry: | 3/17/2021 12:00 AM | Next Run Time: | 7/18/2014 7:08 AM | Recurrence Type: | Report will run every week on the following days: Monday, Tuesday, Wednesday, Thursday, Friday | Printer: | Print the instance to the following printer: "\\P_GUTENBERG\WT7CASEM". | Formats: | Crystal Reports | Parameters: | No Parameters |
| Title:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Census list for 7WT.rpt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Document Type:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Crystal Report                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Status:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Recurring                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| External Destination:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | None                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Owner:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Administrator                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Folder Path:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | MCM Reports/User Reports/ICM RPT/B Scheduled Lists Do not Use/                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Remote Instance:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Creation Time:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 7/16/2014 8:09 AM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Expiry:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | 3/17/2021 12:00 AM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Next Run Time:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 7/18/2014 7:08 AM                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Recurrence Type:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Report will run every week on the following days: Monday, Tuesday, Wednesday, Thursday, Friday                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Printer:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Print the instance to the following printer: "\\P_GUTENBERG\WT7CASEM".                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Formats:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Crystal Reports                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |
| Parameters:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | No Parameters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                         |        |                         |                |                |         |           |                       |      |        |               |              |                                                                |                  |    |                |                   |         |                    |                |                   |                  |                                                                                                |          |                                                                        |          |                 |             |               |



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## Unit Census

Has Demographic data, DC Note and UR note  
Includes WDRG where applicable- Prints to unit- Some will enter note first, then print their own report (Pt Name and ATT MD hidden for this view)

7/18/2014

## UNIT WORKLIST

| PATIENT RM ADM #                                                                                                                                                                                   | AGE | STAT      | ADM DATE | LOS | STATED ADM DX           | ATT MD | PRIM/SEC INS            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----------|----------|-----|-------------------------|--------|-------------------------|
| 66                                                                                                                                                                                                 | INP | 7/16/2014 | 2        |     | lung cancer             |        | MEDICARE                |
| DC PLAN NOTE: Lives w/ husband. Denies needs///                                                                                                                                                    |     |           |          |     |                         |        | BLUE CROSS              |
| UR Notes: 7/16 admit for surgery Bronchoscopy, right video-assisted thoracic surgery, right robotic-assisted thoracic surgery, right upper lobectomy with mediastinal lymph node dissection.       |     |           |          |     |                         |        | WDRG:165<br>GMLOs: 1.22 |
| 46                                                                                                                                                                                                 | INP | 7/18/2014 | 0        |     | lung mass               |        | BLUE CROSS              |
| DC PLAN NOTE:                                                                                                                                                                                      |     |           |          |     |                         |        | SELF PAY                |
| UR Notes: 7/18 admit for surgery Right bronchoscopy, right video assisted thoracic surgery, right robotic assisted thoracic surgery, right upper lobectomy with mediastinal lymph node dissection. |     |           |          |     |                         |        | WDRG:<br>GMLOs:         |
| 41                                                                                                                                                                                                 | INP | 7/16/2014 | 2        |     | ASCENDING AORTIC REPAIR |        | BLUE CROSS              |
| DC PLAN NOTE: Lives with girlfriend Lisa # 320-8022, indep pta, may need HHC                                                                                                                       |     |           |          |     |                         |        | SELF PAY                |
| UR Notes: 7/16 admit for surgery Replacement of the ascending aorta with 30 mm Hemashield tube graft on cardiopulmonary bypass COCGSI CORE SCIP                                                    |     |           |          |     |                         |        | WDRG:238<br>GMLOs: 1.34 |
| 93                                                                                                                                                                                                 | OBS | 7/14/2014 | 4        |     | weakness                |        | MEDICARE                |
| DC PLAN NOTE: Lives w/ daughter, Anne; requests referral to HS. ECIN done.                                                                                                                         |     |           |          |     |                         |        | TRICARE                 |



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## Outlier Report

Report Date: 7/16/2014

## Outlier Report

\* next to Att MD= Hospitalist

| ADM #    | PATIENT | AGE | UNIT/RM    | STAT | LOS | AD's | CHARGES   | ATT PHY | ADM REMARK                   | PRIM INSUR | INS NAME         | SEC INS          |
|----------|---------|-----|------------|------|-----|------|-----------|---------|------------------------------|------------|------------------|------------------|
| 59952482 |         | 75  | XWT:1030-A | INP  | 7   | 0    | \$47,981  |         | anemia                       | MEDICARE   | MEDICAR E A&B    | BLUE CROSS       |
| 59515538 |         | 52  | XWT:1032-A | INP  | 39  | 9    | \$50,757  |         | sepsis                       | CIGNA      | OPEN ACCESS PLUS | SELF PAY         |
| 59907158 |         | 43  | XWT:1041-A | INP  | 11  | 0    | \$103,031 |         | ludwigs angina               | MEDICAID   | EMA PENDING MDCQ | SELF PAY         |
| 59663795 |         | 71  | XWT:1043-A | INP  | 20  | 0    | \$237,008 |         | caludication                 | MEDICARE   | MEDICAR E A&B    | GENERIC CARRIER  |
| 59928261 |         | 93  | XWT:1045-A | INP  | 9   | 0    | \$18,426  |         | fever pneumonia              | MEDICARE   | MEDICAR E A&B    | AARP HEALTH CARE |
| 59822080 |         | 62  | XWT:1046-A | INP  | 17  | 0    | \$111,718 |         | dyspnea                      | MEDICARE   | MEDICAR E A&B    | MEDICAID         |
| 59915235 |         | 43  | 5TA:568-A  | INP  | 10  | 5    | \$12,569  |         | stroke alert                 | SELF PAY   | SELF PAY         | SELF PAY         |
| 59608118 |         | 82  | 5TB:588-A  | INP  | 6   | 0    | \$154,243 |         | scoliosis/CRLF               | MEDICARE   | MEDICAR E A&B    | AARP HEALTH CARE |
| 59639208 |         | 71  | 5TB:594-A  | INP  | 6   | 0    | \$208,793 |         | spondylolisthesis, scoliosis | MEDICARE   | MEDICAR E A&B    | BLUE CROSS       |



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## Entering Data for Two Midnight Report

**Entering Data for Two Midnight Report**

Patient: [Redacted] Encounter: 59795768  
 Patient Type: 1 - Inpatient Att MD: 4283 - [Redacted]  
 Admission: 6/26/2014 23:23 Room/Bed: CY811/A  
 Current LOS: 1 Primary Ins Name: MEDICARE A&B  
 Medical Record #: 1332665

Menu [Icons] Encounter Search: [Redacted] Medical Record #: 1332665

**Topics**

- Review
- Comments (1)
- Delays
- Medical Nec. Reviews (1)
- Physician Advisor
- Interventions
- Payor Contacts
- Discharge Planning (1)
- Concerns
- Denial Reviews

**User Defined**

12to8 Review<sup>1</sup> **2MIDNIGHT<sup>2</sup>** SNF/MAC ADM<sup>3</sup>

Start Time: 12:23 What was Start Date? 7/16/2014

What was the starting point? [Dropdown] Does patient meet criteria for time of Initial Review? NO

[Dropdown Menu Options: DIRECT ADM TIME TO NURSING UNIT, ECC TRIAGE TIME, MAC START TIME, SURG PRE OP TIME]

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SARASOTA MEMORIAL HEALTH CARE SYSTEM

## Two Midnight Report

Report Date: 7/10/2014

| ADM #     | Status | 2 Midnight Alert   | Start Date | Start Time | Starting Point  | PRIM INS     | Did Pt meet BIP Criteria at time of | UNIT/RM | DR. Burns OBS Review? | DR. Burns PA Referral Decision ?      |
|-----------|--------|--------------------|------------|------------|-----------------|--------------|-------------------------------------|---------|-----------------------|---------------------------------------|
| 59929860  | OBS    | > 2 Midnight Alert | 7/7/2014   | 14:33      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 429 |                       | PA ADMISSION STATUS SHOULD REMAIN OBS |
| 59943668  | OBS    | OK                 | 7/8/2014   | 11:15      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 432 |                       | PA ADMISSION STATUS SHOULD REMAIN OBS |
| 59945108  | OBS    | OK                 | 7/8/2014   | 12:11      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 438 |                       |                                       |
| 59945604  | OBS    | OK                 | 7/8/2014   | 20:37      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 440 |                       | PA ADMISSION STATUS SHOULD REMAIN OBS |
| 59951335  | OBS    | OK                 | 7/8/2014   | 18:40      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 434 |                       |                                       |
| 59962010  | OBS    | OK                 | 7/9/2014   | 11:20      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 434 |                       |                                       |
| 59963538  | OBS    | OK                 | 7/9/2014   | 12:13      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 428 |                       |                                       |
| 59968956  | OBS    | OK                 | 7/9/2014   | 15:30      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 440 |                       |                                       |
| 59972014  | OBS    | OK                 | 7/9/2014   | 22:46      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 4NW 438 |                       |                                       |
| 599729177 | OBS    | > 2 Midnight Alert | 7/7/2014   | 14:10      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 5TA 574 |                       |                                       |
| 59953986  | OBS    | OK                 | 7/8/2014   | 22:00      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 5TB 587 |                       |                                       |
| 59969505  | OBS    | OK                 | 7/9/2014   | 16:18      | ECC TRIAGE TIME | MEDICARE A&B | NO                                  | 6WT 647 |                       |                                       |



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## Business Objects Set Up For Export to File Folder

**Filter**

**Setting up file destination Log on for MCCM Account**

**Specific File Name - Place holders to add Date/Time and Extension**

Note: When setting up file folder export, both you and the vdr-mccm account need Read/Write access to the folder

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## Insurance Census PDF Style

This goes to a file folder to be opened and faxed through fax server

CURRENT UNITED CENSUS UNITED MEDICARE/COMMERCIAL  
REPORT DATE: 7/17/2014

Return # for Clinical or Nurse to Nurse  
941-917-1650

| UNIT/IRM                                    | ADM # PT & DOB | ADM DT/LOS               | PLAN           | INS SEQ/POLICY#      | CERT# STATUS                | I/C | # DAYS APPROVED | # DAYS DENIED | ADM DX DESC                           |
|---------------------------------------------|----------------|--------------------------|----------------|----------------------|-----------------------------|-----|-----------------|---------------|---------------------------------------|
| 5EC:5C08                                    | 59797143       | 6/30/2014<br>17 Days LOS | PPO            | PRIMARY<br>000073818 | 7641818900<br>INP           |     |                 |               | pneumonia                             |
| DOB: 7/24/1958<br>ATT MD:<br>Auth/Comment:  |                |                          |                |                      |                             |     |                 |               |                                       |
| 8TA:888                                     | 60037969       | 7/15/2014<br>2 Days LOS  | MEDICARE COMPL | PRIMARY<br>914008006 | 7687898200<br>INP           |     |                 |               | alib, with rapid ventricular response |
| DOB: 6/24/1943<br>ATT MD:<br>Auth/Comment:  |                |                          |                |                      |                             |     |                 |               |                                       |
| RPP:RPP                                     | 59860136       | 7/17/2014<br>0 Days LOS  | POS            | PRIMARY<br>822458899 | A058943677<br>SAME DAY SURG |     |                 |               | 478.32 COMPLETE UNILATERAL PARALYSIS  |
| DOB: 1/23/1953<br>ATT MD:<br>Auth/Comment:  |                |                          |                |                      |                             |     |                 |               |                                       |
| 7WT:731                                     | 60043199       | 7/15/2014<br>2 Days LOS  | CHOICE         | PRIMARY<br>957696884 | 7689125400<br>INP           |     |                 |               | CELLULITIS                            |
| DOB: 10/19/1949<br>ATT MD:<br>Auth/Comment: |                |                          |                |                      |                             |     |                 |               |                                       |

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## Internal Insurance sent in Word to a file folder

Print Date: 7/18/2014

SMH Basic Comprehensive, Extended and  
Charter Health Plans  
Currently Inhouse

**SMH COMPREHEN****Unit: 3NW**

Patient: 59438422 Rm: 330 ADM# 59438422 Admit Date: 7/17/14 D/C Date: DOB: 4/27/56

Notes:

ADM Remark: POST OP BLEEDING

Attending MD: - 9176300

SS #: 362664516

Employer: -

INS: SMH COMPREHEN

Policy #: 76400697203

Group #: -

Cert #: 02072014DAL0008

**Unit: 6TA**

Patient: 60070735 Rm: 678 ADM# 60070735 Admit Date: 7/17/14 D/C Date: DOB: 12/18/65

Notes:

ADM Remark: acute cholecystitis

Attending MD: - 9171579

SS #: 564896575

Employer: SARASOTAMEMORIALHOSPITAL

INS: SMH COMPREHEN

Policy #: 76400900601

Group #: SMHFJ05

Cert #: -

**Unit: COS**

Patient: 59896700 - Rm: CR05 ADM# 59896700 Admit Date: 7/16/14 D/C Date: DOB: 4/3/13

Notes:

ADM Remark: DYSFUNCTIONAL EUSTACIAN TUBE, OTITIS MEDIA ACUTE

Attending MD: - 3793277

SS #: 673310225

Employer: SARASOTAMEMORIALHOSPITAL

INS: SMH COMPREHEN

Policy #: 76401859801

Group #: SMHFJ05

Cert #: 07082014KMI0003

**Unit: XTA**

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## Emailing PHI Reports

Set up

- [PGP] process (Pretty Good Privacy)
  - Automatically Encrypts Outbound Email when [PGP] in subject line– many facilities can encrypt if PHI is present- the [PGP] automatically encrypts anything with [PGP] in the subject line
  - Receiver will be prompted to create a user name password to view incoming email- they will log in each time after when receiving
  - Since there are different version- each side must agree on version
- TLS-Transport Layer Security
  - Each side exchange Encryption Keys so that each domain recognizes each other- thus forms a email VPN
  - Outbound messages encrypted- decrypted when received
  - No log on needed to open emails- acts just like internal email



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## Setting up Domain in Business Objects

One time set up for Host and Port

Then set up To/From Etc for each report



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## Setting up Email Instance Example is an Excel Payer Census

"From" is the clerical email group that interact with the payers- this way the payer can fill out the sheet and reply to same group  
"To" are the payer CM's  
I always cc my self so I know the reports are going out

Fill out subject- this process is set up with TLS so no [PGP] needed

Specific name-  
**SarasotaUnitedMedicare CommercialDaily Census.%SI\_STARTTIME%.%EXT%**  
Lead with name so they know who is sending- then which report Medicare Commercial Current or D/C for example  
**Always end with .%EXT% otherwise the file will not attach**



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## Insurance Census Excel Style Emailed to Payer

| A    | B        | C        | D       | E         | F          | G           | H             | I                                                  | J      | K   | L                     | M         | N           |
|------|----------|----------|---------|-----------|------------|-------------|---------------|----------------------------------------------------|--------|-----|-----------------------|-----------|-------------|
| UNIT | ROOM     | ADM #    | PT NAME | ADM DT    | DOB        | LOS         | STATUS        | ADM DX                                             | ATT MD | NP1 | PLAN                  | INS. SEQ  | POLICY #    |
| YB   | CY711    | 5979194  |         | 7/10/2014 | 7/6/1968   | 6 Days LOS  | INP           | pulmonary valve replacement                        |        |     | 11947CHOICE PLUS      | PRIMARY   | 945014720   |
| COS  | CR13     | 59507832 |         | 7/15/2014 | 11/22/1972 | 1 Days LOS  | SAME DAY SURG | CHRONIC MAXILLARY SINUSITIS, CHRONIC ETHMOID SINUS |        |     | 180180CHOICE PLUS     | PRIMARY   | 931678542   |
| YB   | CY909    | 60010880 |         | 7/12/2014 | 6/18/1925  | 4 Days LOS  | INP           | closed humerus fx                                  |        |     | 160862MDCR SOLUTIONS  | PRIMARY   | 92397993000 |
| SMH  | 777      | 59890326 |         | 7/3/2014  | 4/23/1942  | 13 Days LOS | SAME DAY SURG | eso                                                |        |     | 148764MEDICARE COMPL  | PRIMARY   | 950182966   |
| TZT  | 747      | 60009142 |         | 7/12/2014 | 9/7/1981   | 4 Days LOS  | INP           | lingue abscess                                     |        |     | 141794CHOICE PLUS     | PRIMARY   | 923867088   |
| XWT  | 1039     | 60011018 |         | 7/12/2014 | 2/21/1942  | 4 Days LOS  | INP           | diverticulitis of colon                            |        |     | 189178MDCR COMP CH    | PRIMARY   | 908514316   |
| RPP  | 59697175 |          |         | 6/20/2014 | 1/30/1954  | 26 Days LOS | SAME DAY SURG | PLEURAL EFFUSION NOS                               |        |     | 170087CHOICE PLUS     | PRIMARY   | 90072657    |
| SEC  | 5008     | 59797143 |         | 6/30/2014 | 7/24/1958  | 16 Days LOS | INP           | pneumonia                                          |        |     | 110405PPO             | PRIMARY   | 000073818   |
| RPP  | 59800554 |          |         | 7/15/2014 | 11/4/1957  | 1 Days LOS  | SAME DAY SURG | MALIGNANT NEOPLASM OF BREAST FEMALE UNSP           |        |     | 123511CHOICE PLUS     | PRIMARY   | 947125514   |
| 3WV  | 59961640 |          |         | 7/15/2014 | 5/31/1973  | 1 Days LOS  | OBS           | gall stones, gallbladder disease                   |        |     | 180397SEC HOR MDCR RE | PRIMARY   | 94961567900 |
| ETA  | 885      | 60042995 |         | 7/15/2014 | 10/12/1929 | 1 Days LOS  | OBS           | near syncope/ERI                                   |        |     | 127553MDCR ADVANT GR  | PRIMARY   | 931373733   |
| ETA  | 868      | 60037969 |         | 7/15/2014 | 6/24/1943  | 1 Days LOS  | INP           | afib. with rapid ventricular response              |        |     | 155852MEDICARE COMPL  | PRIMARY   | 914008006   |
| TWT  | 731      | 60043199 |         | 7/15/2014 | 10/19/1949 | 1 Days LOS  | INP           | CELLULITIS                                         |        |     | 144724CHOICE          | PRIMARY   | 957699684   |
| RYA  | CY927    | 60025811 |         | 7/14/2014 | 12/11/1907 | 2 Days LOS  | INP           | FEUR FX                                            |        |     | 125594URG SENIOR SUPP | PRIMARY   | 903499850   |
| RYA  | CY930    | 59967140 |         | 7/15/2014 | 10/6/1958  | 1 Days LOS  | SAME DAY SURG | LEFT ROTATOR CUFF TEAR                             |        |     | 155853CHOICE          | PRIMARY   | 950128628   |
| SED  | 5008     | 60043297 |         | 7/15/2014 | 11/5/1935  | 1 Days LOS  | INP           | bac meningitis, encephalopathy                     |        |     | 155852INDEMNITY       | SECONDARY | 843877549   |
| RYB  | CY810    | 60013780 |         | 7/13/2014 | 8/29/1937  | 3 Days LOS  | INP           | ams pneumonia                                      |        |     | 148783PPO             | SECONDARY | 970789963   |
| RYB  | CY822    | 60045895 |         | 7/15/2014 | 6/16/1923  | 1 Days LOS  | INP           | chf end stage renal disease.uti                    |        |     | 160988OPTIONS PPO     | SECONDARY | 837142764   |
| ETA  | 976      | 60023716 |         | 7/14/2014 | 4/16/1930  | 2 Days LOS  | INP           | altered mental status                              |        |     | 143714CHOICE PLUS     | SECONDARY | 960413930   |
| RYA  | CY830    | 60036338 |         | 7/15/2014 | 3/9/1932   | 1 Days LOS  | INP           | chf                                                |        |     | 173013INDEMNITY       | SECONDARY | 969717734   |
| RYB  | CY923    | 59504753 |         | 7/15/2014 | 7/8/1946   | 1 Days LOS  | INP           | left knee oa                                       |        |     | 168862CHOICE PLUS     | SECONDARY | 844796036   |
| 4NW  | 438      | 60053125 |         | 7/15/2014 | 5/19/1929  | 1 Days LOS  | OBS           | intractable vomiting                               |        |     | 160988OPTIONS PPO     | SECONDARY | 866374697   |
| ETA  | 875      | 60034906 |         | 7/14/2014 | 7/11/1932  | 2 Days LOS  | INP           | abd pain                                           |        |     | 171094OPTIONS PPO     | SECONDARY | 865702723   |
| PDS  | PS3      | 59507446 |         | 7/16/2014 | 5/23/1940  | 9 Days LOS  | INP           | diabetes, hnpCRLF                                  |        |     | 189179INDEMNITY       | SECONDARY | 972747263   |
| RYA  | CY727    | 59557211 |         | 6/30/2014 | 12/28/1934 | 16 Days LOS | INP           | lung cancer                                        |        |     | 148764INDEMNITY       | SECONDARY | 862190297   |
| RYB  | CY816    | 59971163 |         | 7/9/2014  | 7/24/1930  | 7 Days LOS  | INP           | chf                                                |        |     | 168948PPO             | SECONDARY | 880159542   |
| STB  | 590      | 60035278 |         | 7/15/2014 | 3/9/1941   | 1 Days LOS  | INP           | absc. parietal lobe infarction                     |        |     | 127553OPTIONS PPO     | SECONDARY | 890044303   |
| RYB  | CY923    | 60036321 |         | 7/15/2014 | 8/26/1930  | 1 Days LOS  | INP           | pneumonia bradycardia hypoxemia                    |        |     | 127554INDEMNITY       | SECONDARY | 919951631   |
| ETA  | 872      | 59915562 |         | 7/7/2014  | 9/27/1931  | 9 Days LOS  | INP           | Dyspnea, fever, elevated topogm                    |        |     | 142725INDEMNITY       | SECONDARY | 913013095   |



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## Indicator Readmission Email

### TAVR Trans-catheter Aortic Valve Replacement

Issue is that it is I have been unable to get this to generate only when there is a readmission so I only email to me and only forward when there is a readmission

6/28/2014

TAVR READMISSION

---

READMISSION INFORMATION

ADM#: 59764053

ATT MD:

ADM DATE : 6/25/2014

UNIT: 4NW

ADMIT REASON: VOMITING

DAYS SINCE TAVR ADM: 24

PT STATUS: OBSERVATION PATIENT

INITIAL TAVR ADMISSION INFORMATION

ADM#: 58892978

TAVR PROCEDURE: 3505: ENDOVASCULAR REPLACEMENT OF AORTIC VALVE

D/C DATE: 6/11/2014

DC DISPOSITION: DC WITH HOME HEALTH

ATTENDING MD:



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## Reports for HL7 Format Testing Phase- Sending to File Folder

- Uploading ADM Review to Patient EMR for RAC Audit
  - Once RAC Requests are added in MR Request Initiate Report
  - Report runs
  - Exports CSV File to Integration Folder
  - Integration Rule picks up file, formats to HL7 and posts each ADM review to the appropriate patient EMR record
- Uploading Census and D/C patients to Payer
  - Report runs every four hours
  - Exports to Text and sent to Integration folder
  - Integration Rule Converts to HL7 and send via secure VPN to Payer side



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## Adding ADM Review to EMR for Med Record Requests

- When receiving Med Record Requests-Add Cases to MR Request Screen- using the Same Request Date
- Once cases are in Med Rec Request, initiate Crystal Report with date
- Export as CSV file to Interface folder
- Interface script run to pick up file and update EMR
- Note- this process could be modified within Business Objects to run daily, export to file folder and post all ADM reviews to the EMR



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## ADM Review Export- CSV Format

Very similar to Excel Export Report

Start Page CSV Med Nec ADM Review Page for Medical Record Request.rpt

Design Preview

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1. Establish Individual Report ID by combining Denial Rev Date and Encounter # - This lets the Interface Script know which patient to link the Review with in the EMR

{ @REV DATE TEXT } + ":" + { CASE\_SUMMARY.ENCOUNTER\_NUM\_JOIN }

2. Distinguish Comment Type- Determines which Interface Guideline (or none) was used

if { MED\_NEC\_REVIEW\_COMMENTS.COMMENT\_TYPE } in "CLR" then "NON INTERFACE CLINICAL REVIEW"  
 else if { MED\_NEC\_REVIEW\_COMMENTS.COMMENT\_TYPE } in "INTERQUAL" then "INTERQUAL INTERFACE"  
 else if { MED\_NEC\_REVIEW\_COMMENTS.COMMENT\_TYPE } in "CAREWEBQI" then "MILLIMAN INTERFACE"  
 else "OTHER COMMENT TYPE"



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## CSV Export

A

|                                                 |                                                                  |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
|-------------------------------------------------|------------------------------------------------------------------|---------------------------------------|--------------|----------------|----------|----------|------------|-------------|---------------------------------|--------------------------------------------------------|-----------------------------|--------------------------------|------------------|---------|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1                                               | RPTID                                                            | "MRN"                                 | "ADM Number" | "PATIENT NAME" | "DOB"    | "GENDER" | "ADM DATE" | "ADM TIME"  | "MEDICARE NUMBER"               | "MN REVIEW DATE"                                       | "REVIEWER_NAME"             | "REVIEW TYPE"                  | "GUIDELINE USED" | "REVIEW |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2                                               | ADM Date 01-09-2013                                              | Current LOS: 1 Days                   |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 3                                               | Status: In-Patient                                               |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4                                               | Next Review Date:                                                |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 5                                               | MEETS IQ/MILLMAN CRITERIA (A)                                    | Guideline: ABDOMINAL PAIN UNDIAGNOSED |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 6                                               |                                                                  |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 7                                               | Comment: This is Test patient for the ADM/RAC Denial interface." |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 8                                               | RPTID                                                            | "MRN"                                 | "ADM Number" | "PATIENT NAME" | "DOB"    | "GENDER" | "ADM DATE" | "ADM TIME"  | "MEDICARE NUMBER"               | "MN REVIEW DATE"                                       | "REVIEWER_NAME"             | "REVIEW TYPE"                  | "GUIDELINE USED" | "REVIEW |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 9                                               | ADM Date 01-09-2013                                              | Current LOS: 19 Days                  |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 10                                              | Status: In-Patient                                               |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 11                                              | Next Review Date:                                                |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 12                                              | MEETS IQ/MILLMAN CRITERIA (A)                                    | Guideline: ABDOMINAL PAIN UNDIAGNOSED |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 13                                              |                                                                  |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| C D E F G H I J K L M N O P Q R S T U V W X Y Z |                                                                  |                                       |              |                |          |          |            |             |                                 |                                                        |                             |                                |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4                                               | 2013-8203                                                        | CHEESE                                | 4/5/1967     | M              | 1/9/2013 | 10:48:00 | 1/9/2013   | GREG BORDEN | "NON INTERFACE CLINICAL REVIEW" | "M-05: ABDOMINAL PAIN UNDIAGNOSED"                     | "MEETS IQ/MILLMAN CRITERIA" | "ADM Remark: PAIN"             |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4                                               | 2013-8203                                                        | TERRY                                 | 4/16/1975    | F              | 1/9/2013 | 11:20:00 | 1/9/2013   | GREG BORDEN | "NON INTERFACE CLINICAL REVIEW" | "M-05: ABDOMINAL PAIN UNDIAGNOSED"                     | "MEETS IQ/MILLMAN CRITERIA" | "ADM Remark: PAIN"             |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4                                               | 2013-8203                                                        | PATIENTTESTAREA P                     | 4/23/1979    | M              | 2/2/2013 | 19:00:00 | 2/2/2013   | GREG BORDEN | "INTERQUAL INTERFACE"           | "COGISMCO: IQ CONDITIONS OF CARE-GI SURG MODERATE OBS" | "MEETS IQ/MILLMAN CRITERIA" | "Critical Met (Episode Day 3)" |                  |         |  |  |  |  |  |  |  |  |  |  |  |  |  |



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## After posted to EMR Comment Non Interface ADM Review Comment

|                                                           |                              |                                                    |
|-----------------------------------------------------------|------------------------------|----------------------------------------------------|
| MRN: 9102098<br>Visit: 62034360<br>Age: 45y (05-Apr-1967) | CAKE, CHEESE<br>Gender: Male | Sarasota Memorial Hospital<br>Location: 5ED-3, ICU |
|-----------------------------------------------------------|------------------------------|----------------------------------------------------|

02/05/2013 11:00 ICM ADM Review for Visit: 62034360 02/05/2013 11:00 ICM ADM  
ReviewInterface, HL7 MCM (MD); [Entered by: Interfaces, HL7 (SA) 02/05/2013 11:00]  
General Complete, Entered, Signed in Full, General

MEDICARE NUMBER:  
MN REVIEW DATE: 3/9/2013  
REVIEWER NAME: GREG BORDEN  
REVIEW TYPE: NON INTERFACE CLINICAL REVIEW  
GUIDELINE USED: M-05: ABDOMINAL PAIN UNDIAGNOSED  
REVIEW OUTCOME: MEETS IQMILLMAN CRITERIA  
REVIEW COMMENT: ADM Remark: PAIN

ADM Date 01-09-2013 Current LOS: 1 Days  
Status: In-Patient  
Next Review Date:  
MEETS IQMILLMAN CRITERIA (A) Guideline: ABDOMINAL PAIN UNDIAGNOSED  
Comment: This is Test patient for the ADM/RAC Denial interface."

Includes :  
Reviewer  
Review Type  
Guideline Used  
Outcome  
Status  
Interface Comment



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## Report for Exporting to TXT for conversion to HL7

|                  |                               |                             |
|------------------|-------------------------------|-----------------------------|
| Start Page       | Blue Cross HL7 Discharge Prod | Blue Cross HL7 Inhouse Prod |
| Design           |                               |                             |
| Group Header #1: | Group #1 Name                 |                             |
| Details          | @ A All Data                  |                             |

The single formula "@A All Data" in the report is a string of other formulae and groups of formulae so I could move pieces around as needed  
{ @ADM # FULLNAME }+ { @ADM Demo }+ { @INSDATA }+ { @Additional Data }+ { @End of line }

### Sample Export:

```
63027503JOSEPH I JACOBSEN I 9201766 I OBS I 20140417 I 6826 I 0.00 I NICHOLAS I JISUTERAINO  
NPI I PRIMARY I BLUE OPTIONS I SIXJBH36433738 I NO CERT I 19670916 I MI I 11054 I I I *  
63027300 I CHARLES I LIGHTFOOT I 9201764 I INPI 20140414 I 4284 I 13.00 I X I IECC-GROUP I NO  
NPI I PRIMARY I BLUE CHOICE I XJNH79327702 I NO CERT I 19481006 I MI I 11135 I I I *  
63027283 I JOHN I IMCKEE I 9201762 I INPI 20140414 I 25000 I 3.00 I MARTIN I CIALDRICH I NO  
NPI I PRIMARY I PPC I PPO I XJWH10946872 I NO CERT I 20070608 I MI I 11128 I I I *
```

The numbers in red are the ADM Dx Codes entered in our EMR. We are importing that data to a User Defined Field. I linked that Add Data view to the report so we could add the export. The below formulae either adds the number or the statement "NO ADM DX CODE"

```
if isnull  
( {UD001120_QUESTION.ANSWER_CODE} ) then "NO ADM DX CODE" else  
{UD001120_QUESTION.ANSWER_CODE}
```



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## Clinical Documentation Improvement to Optimize DRG Coding

- CDI rule creates a DOC Chart Review on every patient
- CDI Team uses Chart Review to manage Recon cases
  - Recon Active
  - Final Maintained
  - WDRG Maintained
  - Neither Maintained
- Concern Module used to send Recon cases to Designated Coding Specialists
- Series of scheduled reports support process to bill hold and release bill holds automatically



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## Synchronizing Reports and Exports

- Reports are set up to run daily and export directly to a file folder where a script will take the output and perform functions within the ADT system
- Initial report queries for any case discharged that day with a WDRG present- Script will place a Bill Hold
- Second Report queries for any cases with an update that day and that the FDRG and WDRG match- Script will place a release Bill Hold
- Third Report looks for a CDI Chart review with either Final or WDRG correct- Script will place Release Hold



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No that all are .....

Any Questions?



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