

# Clinical Monitoring System V.1.0 User Manual

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# Introduction

The Clinical Monitoring System package is a fully integrated system compatible with Version 7.0 or later of Kernel and Version 19 or later of VA FileMan. The NEW PERSON file (#200) is required.

The heart of the Clinical Monitoring System package is in building monitors using conditions and groups for patient auto enrollment.

The main function of this software is to capture data for patients meeting specified conditions. All monitors within the framework of this software are ultimately based upon patient related data. In order to capture data, you create monitors that run nightly. These nightly runs "auto enroll" (or capture) the patients defined by the monitors.

This system looks at what happened yesterday in **VISTA**. It can capture such items as ward, treating specialty, SSN, age, etc. For a more extensive list of items, use the Data Element File Inquire option within the Outputs Menu of the Monitoring System Manager Menu. Data elements available for capture vary depending on the conditions you select when building monitors.

Conditions are provided with the Clinical Monitoring System package. Examples of conditions include ON WARD, READMISSION, MAS MOVEMENT TYPE, PREVIOUS DISCHARGE, etc. You may use the Condition File Inquire option to obtain information on selected/all conditions. The information provided will describe the condition; tell you what questions will be asked when using a condition; tell you when you must define a group for the condition, and list the other data that is available for capture.

Each condition chosen for a monitor brings up a set of questions pertaining to it. For example, if you choose the AGE condition, you will be asked age ranges. Some conditions require a group be defined such as a group of wards, drug classes, MAS movement types, etc. Patients captured by the monitors are called "fall outs". With each condition used, there is a list of other data that can be captured when a patient becomes a "fall out" that might include items such as ward, admission date, attending, etc.

The monitors can be queued to run nightly, or manually run, one or more at a time. Each monitor has an "ON/OFF" switch, an "UNDER CONSTRUCTION" or "FINISHED" status, and START and STOP dates so that running it can be tightly controlled.

## Software Features

- Provides the user with the ability to design a monitor that will auto enroll cases that meet the user's defined criteria/conditions from **VISTA**.
- Allows the user to set time frames for computing percentages and tracking findings between time frames.
- Has the ability to alert users when important thresholds or dates are met.
- Provides a mechanism to add site-developed conditions and data elements and routines such as site-designed worksheets to the software. MUMPS programming is a required part of site-specific enhancement.
- Provides mechanisms for controlling the disk space and CPU time resources used by the Clinical Monitoring System.
- Allows the user to manually enter cases.

# Orientation

The format of this manual is summarized in the Table of Contents. The Glossary defines general terms relevant to the Clinical Monitoring System and computer use.

The software package uses basic VA FileMan. Refer to Users Guide to Computing for more in-depth help. The following summarizes some of the VA FileMan functions and conventions that are used within the Clinical Monitoring System package.

## **Exiting**

Depending on where you are within the program, entering an "up-arrow" (compressing the **shift** key while striking the **6**) will allow you to jump to the beginning of a new record or to the menu options. Then pressing the <RET> key until you pass through the different levels of the menus will exit you from the program or back to the menu option you wish to use.

## **Help (?, ??, or ???)**

Whenever you are unclear on the definition of a menu option or on how to respond to a prompt, one, two, or three question marks may be entered to obtain an explanation.

## **Deleting**

Deleting default answers that appear before a "/" or a "Replace" is done by entering @ (compressing the **shift** key while striking the **2**). Refer to the Users Guide to Computing for instruction on deleting within word processing fields.

## **Device**

Striking the <RET> (return) key following the "DEVICE:" prompt will print the requested output on the computer screen. If a "Right Margin" prompt shows, you will need to strike the <RET> key once again. Enter the name of the printer/device following the "DEVICE:" prompt to print a hard copy of the output.

### **Patient Look-ups**

When prompted to enter a patient name, use at least the first two letters of the last name to identify the patient. You may also enter the first initial of the last name and the last four digits of the social security number to obtain a record on a specific patient.

### **Bold Print**

Bold print is used throughout the documentation for all user input in the instructional portion of the manual.

### **<RET>**

The **<RET>** symbol is used throughout the manual to designate the use of the return or enter key.

## Package Management

Personal data within the package is covered by the Privacy Act. Data from any monitors considered a quality assurance activity is considered confidential and privileged. Title 38 U.S.C. 5705, as amended by Public Law 99-166, and the implementing HSRO (Health Services Review Organization) regulations (Title 38 Part 17) provide that HSRO records and documents which refer to individual practitioners are confidential and privileged. Exempt from this protection are aggregate statistical data, such as trend reports that do not identify individual patients or employees. Access to the software should be restricted to those personnel who meet the site's established access criteria to data for the above purposes.

# Package Operation

## **Monitoring System Manager Menu**

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## Group Edit

### Introduction

The Group Edit option allows you to create groups of similar data from any **VISTA** file that is in the QAM application group. First determine the conditions you want to use to build your monitor, and then see if within the definition of that condition you will need to define a group. This option is used only when the condition chosen to define a monitor calls for a group. For example, the WARD LOCATION file contains all the wards at the site. You can select specific wards from this file to create a group. MAS MOVEMENT TYPE file contains movement types such as regular, irregular, discharge to CNH, death, etc. You could make a group of admissions to acute care by selecting the "Transfer In", "Direct", and "To ASIH" entries from the MAS MOVEMENT TYPE file.

Descriptions of the conditions are available through the Condition File Inquire option and can also be found in Appendix B of the ADPAC Guide. Use the condition descriptions to determine whether or not you need to define groups.

The Clinical Monitoring System software provides short-cuts so you do not always have to define groups. If, for example, you would like all MAS MOVEMENT TYPES that are "admission" transactions, you do not need to create a group containing all of the individual admission transaction MAS MOVEMENT TYPE entries. Instead, choose the MAS MOVEMENT TYPE condition when building your monitor. When asked which category of movement you are interested in, select "ADMISSIONS", then press <RET> at the group prompt.

### Example

```
Select GROUP: SUBSTANCE ABUSE
  Are you adding 'SUBSTANCE ABUSE' as a new GROUP (the 2ND)? No// Y   (YES)
  GROUP PARENT FILE: FACILITY TREATING SPECIALTY
NAME: SUBSTANCE ABUSE// <RET>
PARENT FILE: FACILITY TREATING SPECIALTY// (No Editing)
Select GROUP MEMBER: PSYCHIATRY
GROUP MEMBER: PSYCHIATRY// <RET>
Select GROUP MEMBER: <RET>
```

## Patient Group

### Introduction

This option allows the user to build a group of patients to monitor using the VA FileMan search option. Once the search and sort parameters have been input, the QAMDFM function must be used at one of the “print field” prompts. This function should be used on a field that is a pointer, free text pointer, or free text Patient Name field.

Usage: QAMFDN(Patient\_name\_Field) **or** QAMDFN(#Patient\_name\_Field\_number)

This option can also be used to update an existing patient group. The file search would occur the same way as when creating a new patient group; however, you will be asked if the newly found entries should be merged with the existing entries or if the old entries should be deleted prior to the search.

If no group entries were created, the group will be deleted.

### Example

We want to build a list of Dr. Brach's patients that had occurrences. Any file we search must have a Patient field that points to the PATIENT file. Dr. Brach is the attending so the Attending Physician field is searched for any entries containing BRACH.

```
Select GROUP: DR BRACH'S PATIENTS
```

```
Are you adding 'DR BRACH'S PATIENTS' as a new GROUP? No// Y (YES)
```

```
Select FILE TO SEARCH: 741 QA OCCURRENCE SCREEN
```

```
Searching the QA OCCURRENCE SCREEN file(#741)
```

```
-A- SEARCH FOR QA OCCURRENCE SCREEN FIELD: ATTENDING PHYSICIAN
```

```
-A- CONDITION: CONTAINS
```

```
-A- CONTAINS: BRACH
```

```
-B- SEARCH FOR QA OCCURRENCE SCREEN FIELD: <RET>
```

```
IF:A// <RET> ATTENDING PHYSICIAN CONTAINS "BRACH"
```

```
STORE RESULTS OF SEARCH IN TEMPLATE: <RET>
```

```
SORT BY: NUMBER// <RET>
```

```
START WITH NUMBER: FIRST// <RET>
```

```
FIRST PRINT FIELD: QAMDFN(QA PATIENT)
```

```
THEN PRINT FIELD: <RET>
```

## Patient Group

### Example

```
*****  
Heading (S/C): QA OCCURRENCE SCREEN SEARCH   Replace <RET>  
STORE PRINT LOGIC IN TEMPLATE: <RET>  
DEVICE: <RET> HOME   RIGHT MARGIN: 80// <RET>
```

```
QA OCCURRENCE SCREEN SEARCH                JAN 19,1998 11:09                PAGE 1  
QAMDFN(QA PATIENT)
```

---

```
      NUMBER: 7  
ONE,TESTPATIENT  
      NUMBER: 8  
TWO,TESTPATIENT  
      NUMBER: 10  
THREE,TESTPATIENT  
      NUMBER: 14  
FOUR,TESTPATIENT  
      NUMBER: 18  
FIVE,TESTPATIENT
```

5 MATCHES FOUND.

Building the DR BRACH'S PATIENTS group...

## Manually Run Auto Enroll

### Introduction

Active monitors are normally run as a nightly task as scheduled by IRM Service. This option allows the user to run selected monitors or selected services when, for some reason, one or more monitors has not run for a day. If a monitor has already been run for a given date in the past, the monitor will not rerun for that same day.

Auto enroll looks at **VISTA** transactions from the previous day to capture fall outs. When auto enroll runs "tomorrow," it will only pick up fall outs with event dates of "today" not "yesterday" or any time before that. For example, fall outs with event dates of 1/4/98 will be picked up when auto enroll runs on 1/5/98.

For manually enrolled monitors, it is important to remember that it is the entry date, not the event date, that will determine whether or not the data will be auto enrolled. Therefore, a record entered manually today will be picked up by auto enroll tomorrow. (A manually enrolled monitor requires total manual entry of fall out data. See the Clinical Monitoring System ADPAC Guide for more details.)

Certain site parameters must contain entries before you may utilize this option. Depending on how the *Manual Auto Run Allowed Times* site parameter is set up, the manual run may only be performed at certain times during the day.

### Example

```
Want to run auto enroll for specific monitors? No// <RET> (No)
```

```
Want to run auto enroll for specific services? No// <RET> (No)
```

```
Enter the date range you want auto enroll to scan
```

```
Monthly, Quarterly, Semi-Annually, Yearly, Fiscal Yearly, User Selectable  
Select date range: USER SELECTABLE
```

```
Enter beginning and ending dates for the desired time period:
```

```
Beginning Date: 2 16 98 (FEB 16, 1998)  
Ending Date: FEB 16,1998// <RET>98 (FEB 16, 1998)
```

```
Range selected: FEB 16,1998 to FEB 16,1998
```

```
Queue auto enroll to run at: N (FEB 17,1998@09:30)
```

## Manually Run Auto Enroll

### Example

Queueing auto enroll, please wait.

Want a report of the dates when auto enroll will run? YES// <RET> (Yes)

DEVICE: <RET> RIGHT MARGIN: 80// <RET>

MANUALLY QUEUED AUTO ENROLL RUN DATES			FEB 17,1998
PERIOD FROM FEB 16,1998 TO FEB 16,1998			PAGE: 1
START DATE	END DATE	QUEUED TO RUN	TASK NUMBER
FEB 16,1998	FEB 16,1998	FEB 17,1998@09:30:31	1449

## Rationale Edit

### Introduction

Rationales are reasons for the use of the monitors. This option allows you to enter new rationales other than those exported with the software (High Volume, Problem Prone, High Risk, Other).

For each rationale, it allows editing of the *Requires Explanation* field. Entering YES at this field means a word processing field will be provided at the time this rationale is selected within the Clinical Monitoring software, so that a more complete explanation can be entered for the rationale.

### Example

Select RATIONALE: ??

Choose from:

- 1 High Volume
- 2 High Risk
- 3 Problem Prone
- 4 Other

This field contains the rationales for the use of a monitor.

Select RATIONALE: **1** High Volume

NAME: High Volume// **<RET>**

REQUIRES EXPLANATION: **N** NO

## Site Parameters Edit

### Introduction

The IRM support staff should configure the program to the site through this option. The following parameters may be entered/edited.

#### *Day Weekly Time Frame Begins*

This is the day of the week that should begin each weekly time frame. Generally, this would be Sunday but could be Monday since that is considered a regular work day.

#### *Monitoring System Device*

The device on which auto enroll reports will print.

#### *Max Days Per Manual Auto Run*

This field contains the maximum number of auto enroll runs that may be run consecutively. A date range of more than three days is allowed; however, the Clinical Monitoring System will break the job up into several tasks, each spanning three days. Note that if this field is set to too small a number and the user runs auto enroll over a large number of days, a large number of tasks will be created.

#### *Time Between Manual Auto Runs*

This field contains the number of minutes between queued runs of auto enroll. This, together with the MAX DAYS limit above, is used to tightly control the use of computer resources that auto enroll processing uses.

#### *Manual Auto Run Allowed Times*

This field contains the range of time during which auto enroll may be manually queued to run. The format is HHMM-HHMM (where hh = hours and mm = minutes). The second time must be greater than the first.

#### *Allow Use of '[' in Group Edit*

Allows use of the "contains" operator ( [ ) in the group edit. If this field is set to YES, the user may enter "[GROUP MEMBER" during group edit to select all entries that contain the text "GROUP MEMBER" as part of their name. Building groups using the "contains" operator is computer intensive.

## Site Parameters Edit

### Example

Select QUALITY ASSURANCE SITE PARAMETERS NAME: **CHICAGO**  
DAY WEEKLY TIME FRAME BEGINS: **Monday**  
MONITORING SYSTEM DEVICE: **DEV-LASER(10)-PORT-80**  
MAX DAYS PER MANUAL AUTO RUN: **3**  
TIME BETWEEN MANUAL AUTO RUNS: **30**  
MANUAL AUTO RUN ALLOWED TIMES: **0000-2359**  
ALLOW USE OF '[' IN GROUP EDIT: YES// **<RET>**

## **Build Monitor Menu Enter/Edit a Monitor**

### **Introduction**

The Enter/Edit a Monitor option is used to build an auto enroll monitor (automatically enrolls fall out cases) or a manual enroll monitor (accepts manual entry of patient names).

Associating a service with the monitor at the *Service* prompt will allow you to print out a list of all monitors for the service through the Manually Run Auto Enroll option.

The entry at the *Treating Specialty Group* prompt should have been defined through the Group Edit option on the Manager Menu before utilizing this option, if necessary.

You may enter '?CONDITION' (e.g., ?AGE) at the *Select CONDITION* prompt to see a description of a condition or range of conditions. Enter '?\*' to see the descriptions for all conditions. You may only select conditions that match the monitor type (auto enroll or manual enroll).

Before you begin to build a monitor, you may want to consider the following tips.

- Read through this manual to determine required information.
- Define your monitor using that information and the Build a Monitor Worksheet which may be obtained through the Build a Monitor Worksheet option on the Outputs Menu.
- Determine the conditions needed. Use the Condition File Inquire option to check if those conditions are available.
- Determine if any of the conditions require a group be defined. If so, use the Group Edit option to build the group.

## **Build Monitor Menu Enter/Edit a Monitor**

### **Introduction**

Manually entered monitors require more work than auto enrolled monitors.

- Once they are built, you should use the Fall Out Edit option on the Monitoring System User Menu to enter names of patients who meet the fall out conditions you have determined. You will then be prompted with default information for the data elements that have been built into the monitor.
- Since this is a monitor that you are reviewing manually, there will be cases that are not considered fall outs. If you want to keep track of the total number of cases you reviewed, use the Sample Size Edit option on the Monitoring System User Menu to update the sample size.
- Manually entered fall outs will be automatically counted by the nightly run of auto enroll if the entry date of the fall out is the day just previous to the auto enroll. Auto enroll runs pick up those fall outs whose entry dates are T-1 and updates the statistics which can be accessed through the Monitor History Report option.

### *Error/Warning Designations*

The Clinical Monitoring System checks the validity of your monitor and displays errors and warnings to help you correct it. Fields with an \*ERROR\* designation must be completed for the program to auto enroll patients. \*WARNING\* designations are to let the user know that certain portions of the monitor may not run if the field is not completed. For many monitors, those fields may not be necessary. However, the ON/OFF SWITCH field (which receives a \*WARNING\* when it is turned OFF), must be ON for the monitor to run.

Please note that up-arrow jumping between prompts is not allowed in this option. This is due to the internal processing that the Clinical Monitoring System must accomplish. The Quick Monitor Edit option, described later in this manual, allows certain fields to be edited without reediting the entire monitor.



## Build Monitor Menu Enter/Edit a Monitor

### Example 1 - Auto Enroll Monitor

Select RATIONALE: <RET>

AUTO ENROLL MONITOR: YES// **YES**

Select CONDITION: ?

You may enter '?CONDITION' (e.g., ?AGE) at the 'Select CONDITION:' prompt to see a description of a condition or range of conditions. Enter '?\*' to see the descriptions for all conditions.

Answer with CONDITION , or NUMBER

You may enter a new CONDITION, if you wish

Enter a condition that will make up the monitor.

You may only select conditions that match the monitor type, auto/manual enroll.

Answer with CONDITION NAME

Do you want the entire CONDITION list? **Y** (YES)

CHOOSE FROM:

AGE  
APPOINTMENT  
DEATH  
FALL OUT  
LAB-CHEM,HEM,TOX,RIA,SER,ETC  
LENGTH OF STAY IN SPECIALTY  
LENGTH OF STAY ON A WARD  
LENGTH OF STAY SINCE ADMISSION  
MAS MOVEMENT TYPE  
MH SECLUSION/RESTRAINT  
ON SERVICE  
ON TREATING SPECIALTY  
ON WARD  
OS-101.1  
OS-102  
OS-106.1  
OS-107  
OS-109  
OS-199  
PATIENT GROUP  
PREVIOUS DISCHARGE FROM WARD  
PREVIOUS DISCHARGE MVMENT TYPE  
PREVIOUS DISCHARGE TREAT SPEC  
PTF DIAGNOSES/OPERATION CODES  
READMISSION  
REGISTRATION  
RXS 2+ DRUGS IN THE SAME CLASS  
SEX  
SPECIALTY TRANSFER  
SSN SAMPLE  
WARD TRANSFER

Select CONDITION: **LENGTH OF STAY IN SPECIALTY**

CONDITION: LENGTH OF STAY IN SPECIALTY// <RET>

# Build Monitor Menu

## Enter/Edit a Monitor

### Example 1 - Auto Enroll Monitor

LENGTH OF STAY: (1-365): **28**

TREATING SPECIALTY GROUP: **26**    SUBSTANCE ABUSE    FACILITY TREATING SPECIALTY

CONTRIBUTES TO SAMPLE: **??**

This field determines whether or not this condition contributes to the sample size (denominator). This affects how information is collected to determine the size of the sample (denominator). Answer 'YES' to this question if the patients meeting this condition should be counted in the sample size. Answer 'NO' if these patients should not be counted.

CHOOSE FROM:

- 1            YES
- 0            NO

CONTRIBUTES TO SAMPLE: **YES**

Select CONDITION: **<RET>**

=====

CODE	CONDITION
C1	LENGTH OF STAY IN SPECIALTY

FALL OUT RELATIONSHIP: **??**

CODE	CONDITION
C1	LENGTH OF STAY IN SPECIALTY

This field specifically states the relationship between the conditions entered by the user. The user may use & (and), ! (or), ' (not), and parentheses () to specify the relationship.

FALL OUT RELATIONSHIP: **C1**

=====

CODE	CONDITION
C1	LENGTH OF STAY IN SPECIALTY

SAMPLE RELATIONSHIP: **??**

CODE	CONDITION
C1	LENGTH OF STAY IN SPECIALTY

Enter the relationship among the conditions. This field specifically states the relationship between the conditions that contribute to the sample size. The user may use & (and), ! (or), ' (not) and parentheses () to specify the relationship.

SAMPLE RELATIONSHIP: **C1**

# Build Monitor Menu

## Enter/Edit a Monitor

### Example 1 - Auto Enroll Monitor

=====

NUMBER	CONDITION
1	LENGTH OF STAY IN SPECIALTY

CONDITION FOR DATE OF EVENT: ??

NUMBER	CONDITION
1	LENGTH OF STAY IN SPECIALTY

This field controls which of the conditions will provide the date that will be used as the event date for the fall out. You will usually want to pick the condition whose date most uniquely defines the event you are monitoring. For example, if you were monitoring all female (Condition #1: SEX) admissions (Condition #2: MAS MOVEMENT TYPE) you would pick condition number two as the condition to supply the event date.

CONDITION FOR DATE OF EVENT: 1

=====

TIME FRAME: ??

Time frame is the period of time over which the program begins capturing data and then sums up the data to start all over again with the beginning of the next similar time frame.

CHOOSE FROM:

- Annually
- Daily
- Fiscal Semi-Annually
- Fiscal Yearly
- Monthly
- Quarterly
- Semi-Annually
- Weekly

TIME FRAME: **QUARTERLY** Quarterly

THRESHOLD: ??

Threshold defines the number or percentage of fall outs after which some specific action will occur. The threshold may be entered as a pure numeric response (e.g., 38), or as a percentage (e.g., 38%).

THRESHOLD: 10

## Build Monitor Menu Enter/Edit a Monitor

### Example 1 - Auto Enroll Monitor

PRE-THRESHOLD ALERT LEVEL: ??

For PERCENT thresholds:

This field defines the minimum sample size (denominator) that must be reached before threshold checking occurs.

For NUMERIC thresholds:

This field may be used along with the BULLETIN WHEN MIN SAMPLE MET field (set to YES) as a pre-threshold notification.

PRE-THRESHOLD ALERT LEVEL: **4**

ALLOW 'DUPLICATE' FALL OUTS: ??

Answering Y(es) to this question allows an event to fall out multiple times for the same patient within a given time frame. Answering N(o) will allow the event to fall out only once per time frame.

For example, a monitor is set up to capture all admissions over a monthly time frame. Assume a patient is admitted twice in the same month. Answering 'NO' to this question will capture only the patient's first admission. Answering 'YES' will capture both.

CHOOSE FROM:

1 YES  
0 NO

ALLOW 'DUPLICATE' FALL OUTS: **YES**

Select OTHER DATA TO CAPTURE: ??

When a patient meets the conditions of the monitor and falls out the other data to capture entries define which data elements in the patient's record should be collected.

CHOOSE FROM:

ADMITTED FOR SC CONDITION? PATIENT MOVEMENT  
ADMITTING REGULATION PATIENT MOVEMENT  
ATTENDING PHYSICIAN PATIENT MOVEMENT  
DIAGNOSIS [SHORT] PATIENT MOVEMENT  
FACILITY TREATING SPECIALTY PATIENT MOVEMENT  
MAS MOVEMENT TYPE PATIENT MOVEMENT  
MOVEMENT DATE/TIME PATIENT MOVEMENT  
PRIMARY CARE PHYSICIAN PATIENT MOVEMENT  
ROOM-BED PATIENT MOVEMENT  
TRANSACTION TYPE PATIENT MOVEMENT  
TYPE OF MOVEMENT PATIENT MOVEMENT  
WARD LOCATION PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **WARD** LOCATION PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **PRIMARY CARE PHYSICIAN** PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **ATTENDING PHYSICIAN** PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **<RET>**

PRINT DAILY FALL OUT LIST: NO// ??

This field determines whether or not a generic list of all fall outs, sorted by monitor, is printed daily.

CHOOSE FROM:

1 YES  
0 NO

## Build Monitor Menu

### Enter/Edit a Monitor

#### Example 1 - Auto Enroll Monitor

PRINT DAILY FALL OUT LIST: NO// **YES**

PRINT DAILY WORKSHEETS: NO// ??

This field determines whether worksheets are printed daily for all fall outs for this monitor. For this to work, the worksheet must first be created by a programmer and linked to the monitor.

CHOOSE FROM:

1 YES

0 NO

PRINT DAILY WORKSHEETS: NO// **<RET>**

BULLETIN WHEN THRESHOLD MET: NO// ??

If this field is answered YES, then a bulletin will be sent to a specified mail group when the threshold is met. This bulletin is sent only once per time frame.

CHOOSE FROM:

1 YES

0 NO

BULLETIN WHEN THRESHOLD MET: NO// **YES**

BULLETIN AT END OF TIME FRAME: NO// ??

If this field is answered YES, then a bulletin will be sent to a specified mail group when the end of the time frame is reached. This bulletin is sent only once per time frame.

CHOOSE FROM:

1 YES

0 NO

BULLETIN AT END OF TIME FRAME: NO// **YES**

BULLETIN WHEN ALERT LEVEL MET: NO// ??

If this field is answered YES, then a bulletin will be sent to a specified mail group when the minimum sample size is met or exceeded. This bulletin is sent only once per time frame.

CHOOSE FROM:

1 YES

0 NO

BULLETIN WHEN ALERT LEVEL MET: NO// **YES**

BULLETIN MAIL GROUP: ?

Enter the mail group bulletins should be sent to.

Only 'public' mail groups are selectable.

Answer with MAIL GROUP NAME

Do you want the entire MAIL GROUP List? **NO**

BULLETIN MAIL GROUP: **QAM-NOTIFICATION**

START DATE: **T** (JUL 17, 1992)

END DATE: **T+365** (JUL 17, 1993)

## Build Monitor Menu Enter/Edit a Monitor

### Example 1 - Auto Enroll Monitor

ON/OFF SWITCH: OFF// ??

This field controls whether or not a monitor is active. For an auto enroll monitor to capture data the switch must be turned on. For a manual entry monitor to be selectable, the switch must be turned on. When you wish to stop using a monitor, this switch should be turned off.

CHOOSE FROM:

1	ON
0	OFF

ON/OFF SWITCH: OFF// **ON**

Checking monitor...  
No errors found.

MONITOR STATUS: UNDER CONSTRUCTION// ??

Answer FINISHED to this field only when you are sure you are completely finished entering/editing this monitor. Once you answer FINISHED you will no longer be able to edit selected monitor fields.

CHOOSE FROM:

1	FINISHED
0	UNDER CONSTRUCTION

MONITOR STATUS: UNDER CONSTRUCTION// **FINISHED**

# Build Monitor Menu

## Enter/Edit a Monitor

### Example 2 - Manual Enroll Monitor

Select MONITOR: **CAT-1**

Are you adding 'CAT-1' as a new QA MONITOR (the 5TH)? No// **Y** (YES)

QA MONITOR TITLE: **XXX TEST MANUAL ENTRY**

CODE: CAT-1// **<RET>**

TITLE: XXX TEST MANUAL ENTRY Replace **<RET>**

SERVICE: **QUALITY MANAGEMENT**

STANDARD OF CARE:

No existing text

Edit? NO// **<RET>**

CLINICAL INDICATOR:

No existing text

Edit? NO// **<RET>**

Select RATIONALE: **Problem Prone**

Select RATIONALE: **<RET>**

AUTO ENROLL MONITOR: YES// **NO**

Select CONDITION: **MANUAL ENROLL CONDITION**

CONDITION: MANUAL ENROLL CONDITION// **<RET>**

CONTRIBUTES TO SAMPLE: **<RET>**

Select CONDITION: **<RET>**

```
=====
```

CODE	CONDITION
C1	MANUAL ENROLL CONDITION

FALL OUT RELATIONSHIP: **C1**

```
=====
```

NUMBER	CONDITION
1	MANUAL ENROLL CONDITION

CONDITION FOR DATE OF EVENT: **1**

```
=====
```

TIME FRAME: **Quarterly**

THRESHOLD: **20**

PRE-THRESHOLD ALERT LEVEL: **<RET>**

ALLOW 'DUPLICATE' FALL OUTS: **<RET>**

Select OTHER DATA TO CAPTURE: **AGE** PATIENT

Select OTHER DATA TO CAPTURE: **DIAGNOSIS [SHORT]** PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **FACILITY TREATING SPECIALTY** PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **PRIMARY CARE PHYSICIAN** PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **SOCIAL SECURITY NUMBER** PATIENT

Select OTHER DATA TO CAPTURE: **WARD LOCATION** PATIENT MOVEMENT

Select OTHER DATA TO CAPTURE: **<RET>**

## Build Monitor Menu Enter/Edit a Monitor

### Example 2 - Manual Enroll Monitor

PRINT DAILY FALL OUT LIST: NO// <RET>  
PRINT DAILY WORKSHEETS: NO// <RET>  
BULLETIN WHEN THRESHOLD MET: NO// YES  
BULLETIN AT END OF TIME FRAME: NO// YES  
BULLETIN WHEN ALERT LEVEL MET: NO// <RET>  
BULLETIN MAIL GROUP: QA-1  
START DATE: T-5  
END DATE: <RET>  
ON/OFF SWITCH: OFF// ON

Checking monitor...

Warning: SAMPLE RELATIONSHIP not specified  
No errors found.

MONITOR STATUS: UNDER CONSTRUCTION// FINISHED

## Build Monitor Menu Copy/Edit a Monitor

### Introduction

This option takes an existing monitor and copies it to a new monitor. It could be utilized if you wish to design a new monitor similar to an existing one.

The option automatically adds the words "Copy of" to the Code and Title fields of the selected monitor. These fields allow up to 30 characters, so the code and name may be truncated if they are too long. It is recommended that you change the code and title of the new monitor at the time the copy is made.

### Example

```
Select MONITOR TO COPY: PSY-1   LOS ON SUBSTANCE ABUSE   FINISHED

Are you sure you want to copy this monitor? NO// Y   (YES)

Copying monitor, please wait...

You may now edit the copy of the monitor, please change the CODE and TITLE.

CODE: Copy of PSY-1// PSY-12
TITLE: Copy of LOS ON SUBSTANCE ABUSE   Replace ... With LOS ON ALCOHOL REHAB
  Replace
  LOS ON ALCOOHOL REHAB
SERVICE: PSYCHIATRY// <RET>
STANDARD OF CARE:
  No existing text
  Edit? NO// <RET>
CLINICAL INDICATOR:
  No existing text
  Edit? NO// <RET>
Select RATIONALE: Other// PROBLEM PRONE
  EXPLAIN RATIONALE:
  No existing text
  Edit? NO// <RET>
Select RATIONALE: <RET>
AUTO ENROLL MONITOR: YES// <RET>
Select CONDITION: LENGTH OF STAY IN SPECIALTY// <RET>
  ...OK? YES// <RET>   (YES)
CONDITION: LENGTH OF STAY IN SPECIALTY// <RET>
LENGTH OF STAY (1-365): 28// 30
TREATING SPECIALTY GROUP: SUBSTANCE ABUSE// ALCOHOL REHAB
CONTRIBUTES TO SAMPLE: YES// <RET>
Select CONDITION: <RET>
```

# Build Monitor Menu

## Copy/Edit a Monitor

### Example

```
=====
CODE          CONDITION
-----
C1            LENGTH OF STAY IN SPECIALTY

FALL OUT RELATIONSHIP: C1// <RET>
```

```
=====
CODE          CONDITION
-----
C1            LENGTH OF STAY IN SPECIALTY

SAMPLE RELATIONSHIP: C1// <RET>
```

```
=====
NUMBER        CONDITION
-----
1             LENGTH OF STAY IN SPECIALTY

CONDITION FOR DATE OF EVENT: 1// <RET>
```

```
=====
TIME FRAME: Quarterly// <RET>
THRESHOLD: 5// <RET>
PRE-THRESHOLD ALERT LEVEL: 4// <RET>
ALLOW 'DUPLICATE' FALL OUTS: YES// <RET>
Select OTHER DATA TO CAPTURE: WARD LOCATION// <RET>
PRINT DAILY FALL OUT LIST: YES// <RET>
PRINT DAILY WORKSHEETS: NO// <RET>
BULLETIN WHEN THRESHOLD MET: YES// <RET>
BULLETIN AT END OF TIME FRAME: YES// <RET>
BULLETIN WHEN ALERT LEVEL MET: YES// <RET>
BULLETIN MAIL GROUP: QA-1// <RET>
START DATE: JUL 17,1991// <RET>
END DATE: <RET>
ON/OFF SWITCH: OFF// <RET>

MONITOR STATUS: UNDER CONSTRUCTION// <RET>
```

## Build Monitor Menu Quick Monitor Edit

### Introduction

This option allows for editing of the following monitor fields; on/off switch, start and end dates, bulletin switches, and bulletin mail groups.

It is recommended that this option be used to edit active monitors.

### Example

```
Select MONITOR: PSY-1   LOS ON SUBSTANCE ABUSE   FINISHED
PRINT DAILY FALL OUT LIST: YES// <RET>
PRINT DAILY WORKSHEETS: NO// YES
BULLETIN WHEN THRESHOLD MET: YES// <RET>
BULLETIN AT END OF TIME FRAME: YES// <RET>
BULLETIN WHEN ALERT LEVEL MET: YES// <RET>
BULLETIN MAIL GROUP: QA-1// <RET>
START DATE: JUL 17,1991// <RET>
END DATE: <RET>
ON/OFF SWITCH: ON// OFF
```

Checking monitor...

Warning: ON/OFF SWITCH is turned off  
No errors found.

```
MONITOR STATUS: FINISHED// <RET>
```

## Purge Menu

### Auto Enroll Run Dates File Purge

#### Introduction

This option purges data generated from the AUTO ENROLL RUN DATE file (#743.92) for selected monitors for a selected date range. Note that once the data has been deleted, it cannot be recovered.

The AUTO ENROLL RUN DATE file contains one entry for each date. Within that entry is a list of all the monitors that ran on that date. When this file is purged, the monitor names that are stored with each date in the selected purge date range are deleted; however, the date entry is not deleted.

#### Example

```
*****
* This option DELETES selected data from the Auto Enroll Run Dates file *
*           Once the data has been deleted it CANNOT BE RECOVERED      *
*****
```

Are you sure you want to continue? NO// YES

Select the monitors to delete.

Select MONITOR: **PSY-1**

Another one: <RET>

Select the date range to delete.

Monthly, Quarterly, Semi-Annually, Yearly, Fiscal Yearly, User Selectable

Select date range: **User Selectable**

Enter beginning and ending dates for the desired time period:

Beginning Date: **7/15/98**

Ending Date: JUL 15,1998// <RET>

Range selected: JUL 15,1998 to JUL 15,1998

Ready to DELETE, are you sure? NO// YES

Deletion request queued.

## Purge Menu Fall Out File Purge

### Introduction

This option purges data from the FALL OUT file (#743.1) for selected monitors for a selected date range. Note that once the data has been deleted, it cannot be recovered.

### Example

```
*****  
*      This option DELETES selected data from the Fall Out file      *  
*      Once the data has been deleted it CANNOT BE RECOVERED      *  
*****
```

Are you sure you want to continue? NO// YES

Select the monitors to delete.

Select MONITOR: **PSY-1**

Another one: <RET>

Select the date range to delete.

Monthly, Quarterly, Semi-Annually, Yearly, Fiscal Yearly, User Selectable  
Select date range: **User Selectable**

Enter beginning and ending dates for the desired time period:

Beginning Date: **T-2**

Ending Date: JUL 15,1998// <RET>

Range selected: JUL 15,1998 to JUL 15,1998

Ready to DELETE, are you sure? NO// YES

Deletion request queued.

## Purge Menu History File Purge

### Introduction

This option purges data from the MONITOR HISTORY file (#743.2) for selected monitors for a selected date range. The MONITOR HISTORY file contains the numbers for sample size and fall outs. Note that once the data has been deleted, it cannot be recovered.

### Example

```
*****  
* This option DELETES selected data from the Monitor History file *  
* Once the data has been deleted it CANNOT BE RECOVERED *  
*****
```

Are you sure you want to continue? NO// YES

Select the monitors to delete.

Select MONITOR: **PSY-1**

Another one: <RET>

Select the date range to delete.

Monthly, Quarterly, Semi-Annually, Yearly, Fiscal Yearly, User Selectable  
Select date range: **User Selectable**

Enter beginning and ending dates for the desired time period:

Beginning Date: **T-2**

Ending Date: JUL 15,1998// <RET>

Range selected: JUL 15,1998 to JUL 15,1998

Ready to DELETE, are you sure? NO// YES

Deletion request queued.

## Outputs Menu

### Ad Hoc Fall Out Report

#### Introduction

This option allows you to design your own reports from data in the FALL OUT file (#743.1). The data elements present in the FALL OUT file are determined by the data elements selected when the monitor was built. An attempt to sort/print a data element that was not entered into the monitor's *Other Data to Capture* will produce no data for that element.

It is suggested that you limit your sorts by making Event Date one of the sorts and enter a range. Event Date is the date of the transaction that caused the record to fall out. If the monitor has a look-back of 30 days, the Event Date could be as much as 30 days prior to the Creation Date. Creation Date is the date the monitor was looking at when it ran (i.e., yesterday).

If you built an admission monitor to use only as a fall out condition for other monitors, you will get a list of all admissions.

#### Example

```
Enter the fields you wish to sort on.  
Maximum two sort fields allowed.
```

```
1 Patient Name 3 Event Date  
2 Monitor      4 Data Element
```

```
Sort selection #1: 2
```

```
Enter the beginning and ending values for MONITOR CODE.
```

```
Start with: First// PSY-1
```

```
End with: Last// PSY-1
```

```
Select next field to sort on.  
Maximum two sort fields allowed.  
* indicates already selected.
```

```
1 Patient Name 3 Event Date  
2 *Monitor     4 Data Element
```

```
Sort selection #2: <RET>
```

# Outputs Menu

## Ad Hoc Fall Out Report

### Example

Enter the fields you wish to print.  
Maximum four print fields allowed.

1 Patient Name 3 Event Date  
2 Monitor 4 Data Element

Print selection # 1: **1**

Select next field to print on.  
Maximum four print fields allowed.  
\* indicates already selected.

1 \*Patient Name 3 Event Date  
2 Monitor 4 Data Element

Print selection # 2: **3**

Select next field to print on.  
Maximum four print fields allowed.  
\* indicates already selected.

1 \*Patient Name 3 \*Event Date  
2 Monitor 4 Data Element

Print selection # 3: **4**

Select Data Element: **A**

By 'A' do you mean ALL 69 DATA ELEMENTS? YES// **<RET>**

Another one: **<RET>**

Select next field to print on.  
Maximum four print fields allowed.  
\* indicates already selected.

1 \*Patient Name 3 \*Event Date  
2 Monitor 4 \*Data Element

Print selection # 4: **<RET>**

Enter the special report header, if desired (maximum 55 characters): **TEST**

DEVICE: HOME// **HALLWAY PRINTER**

RIGHT MARGIN: 80// **<RET>**

# Outputs Menu

## Ad Hoc Fall Out Report

### Example

TEST  
SORTED BY MONITOR

JUL 18,1998  
PAGE: 1

\*\* This information is confidential in accordance with Title 38 U.S.C. 5705 \*\*

---

---MONITOR: PSY-1

PATIENT NAME: ONE,TEST  
EVENT DATE: JUL 18,1998

CREATION DATE: JUL 18,1998

ADMITTING REGULATION  
AGE  
APPOINTMENT DATE/TIME  
DIAGNOSIS [SHORT]  
FACILITY TREATING SPECIALTY  
PRIMARY CARE PHYSICIAN  
PURPOSE OF VISIT  
SOCIAL SECURITY NUMBER  
WARD LOCATION

ACTIVE PSYCHOSIS  
52  
PARANOIA  
PSYCHIATRY  
SPORE, DR.  
123456789  
3W

PATIENT NAME: TWO,TEST  
EVENT DATE: JUL 18,1998

CREATION DATE: JUL 18,1998

ADMITTING REGULATION  
AGE  
APPOINTMENT DATE/TIME  
DIAGNOSIS [SHORT]  
FACILITY TREATING SPECIALTY  
PRIMARY CARE PHYSICIAN  
PURPOSE OF VISIT  
SOCIAL SECURITY NUMBER  
WARD LOCATION

46  
DIABETES  
MEDICINE  
JONES, DR.  
123456789  
5E

# Outputs Menu

## Ad Hoc Monitor Report

### Introduction

This option allows you to design reports from data in the QA MONITOR file (#743). A maximum of four sort fields and seven prints fields are allowed. For more complete instructions on how to use the Ad Hoc Report Generator, refer to the Ad Hoc Report Generator chapter in the QM Integration User Manual.

### Example

```
===== Monitoring System Ad Hoc Report Generator =====
1 Monitor Code          14 Threshold
2 Monitor Title         15 Hi/Lo Percent
3 Service               16 Start Date
   Standard of Care     17 End Date
   Clinical Indicator   18 Print Daily Fall Out List
6 Rationale             19 Bulletin When Threshold Met
   Explain Rationale    20 Bulletin At End Of Time Frame
8 Auto Enroll Monitor  21 Bulletin When Min Sample Met
9 Monitor Status        22 Bulletin Mail Group
10 On/Off Switch        23 Mail Group Description
11 Condition            24 Mail Group Member
12 Time Frame           25 Allow 'Duplicate' Fall Outs
13 Min Sample/Alert Level 26 Other Data To Capture
```

Sort selection # 1 : **11** Condition

Sort from: BEGINNING// <RET>

```
===== Clinical Monitoring System Ad Hoc Report Generator =====
1 Monitor Code          14 Threshold
2 Monitor Title         15 Hi/Lo Percent
3 Service               16 Start Date
   Standard of Care     17 End Date
   Clinical Indicator   18 Print Daily Fall Out List
6 Rationale             19 Bulletin When Threshold Met
   Explain Rationale    20 Bulletin At End Of Time Frame
8 Auto Enroll Monitor  21 Bulletin When Min Sample Met
9 Monitor Status        22 Bulletin Mail Group
10 On/Off Switch        23 Mail Group Description
11 * Condition          24 Mail Group Member
12 Time Frame           25 Allow 'Duplicate' Fall Outs
13 Min Sample/Alert Level 26 Other Data To Capture
```

Sort selection # 2 : **26** Other Data To Capture

Sort from: BEGINNING// <RET>

## Outputs Menu Ad Hoc Monitor Report

### Example

```
===== Clinical Monitoring System Ad Hoc Report Generator =====  
1 Monitor Code 14 Threshold  
2 Monitor Title 15 Hi/Lo Percent  
3 Service 16 Start Date  
Standard of Care 17 End Date  
Clinical Indicator 18 Print Daily Fall Out List  
6 Rationale 19 Bulletin When Threshold Met  
Explain Rationale 20 Bulletin At End Of Time Frame  
8 Auto Enroll Monitor 21 Bulletin When Min Sample Met  
9 Monitor Status 22 Bulletin Mail Group  
10 On/Off Switch Mail Group Description  
11 * Condition 24 Mail Group Member  
12 Time Frame 25 Allow 'Duplicate' Fall Outs  
13 Min Sample/Alert Level 26 * Other Data To Capture
```

Sort selection # 3 : <RET>

```
===== Clinical Monitoring System Ad Hoc Report Generator =====  
1 Monitor Code 14 Threshold  
2 Monitor Title 15 Hi/Lo Percent  
3 Service 16 Start Date  
4 Standard of Care 17 End Date  
5 Clinical Indicator 18 Print Daily Fall Out List  
6 Rationale 19 Bulletin When Threshold Met  
7 Explain Rationale 20 Bulletin At End Of Time Frame  
8 Auto Enroll Monitor 21 Bulletin When Min Sample Met  
9 Monitor Status 22 Bulletin Mail Group  
10 On/Off Switch 23 Mail Group Description  
11 Condition 24 Mail Group Member  
12 Time Frame 25 Allow 'Duplicate' Fall Outs  
13 Min Sample/Alert Level 26 Other Data To Capture
```

Print selection # 1 : 11 Condition

# Outputs Menu

## Ad Hoc Monitor Report

### Example

=====  
Clinical Monitoring System Ad Hoc Report Generator  
=====

1	Monitor Code	14	Threshold
2	Monitor Title	15	Hi/Lo Percent
3	Service	16	Start Date
4	Standard of Care	17	End Date
5	Clinical Indicator	18	Print Daily Fall Out List
6	Rationale	19	Bulletin When Threshold Met
7	Explain Rationale	20	Bulletin At End Of Time Frame
8	Auto Enroll Monitor	21	Bulletin When Min Sample Met
9	Monitor Status	22	Bulletin Mail Group
10	On/Off Switch	23	Mail Group Description
11	* Condition	24	Mail Group Member
12	Time Frame	25	Allow 'Duplicate' Fall Outs
13	Min Sample/Alert Level	26	Other Data To Capture

Print selection # 2 : **26** Other Data To Capture

=====  
Clinical Monitoring System Ad Hoc Report Generator  
=====

1	Monitor Code	14	Threshold
2	Monitor Title	15	Hi/Lo Percent
3	Service	16	Start Date
4	Standard of Care	17	End Date
5	Clinical Indicator	18	Print Daily Fall Out List
6	Rationale	19	Bulletin When Threshold Met
7	Explain Rationale	20	Bulletin At End Of Time Frame
8	Auto Enroll Monitor	21	Bulletin When Min Sample Met
9	Monitor Status	22	Bulletin Mail Group
10	On/Off Switch	23	Mail Group Description
11	* Condition	24	Mail Group Member
12	Time Frame	25	Allow 'Duplicate' Fall Outs
13	Min Sample/Alert Level	26	* Other Data To Capture

Print selection # 3 : <RET>

Enter special report header, if desired (maximum of 60 characters).

<RET>

DEVICE: <RET> UCX/TELNET Right Margin: 80// <RET>

QA MONITOR LIST  
Condition

MAR 2,1999 09:29 PAGE 1  
Other Data To Capture

-----  
LENGTH OF STAY IN SPECIALTY  
LENGTH OF STAY IN SPECIALTY  
LENGTH OF STAY IN SPECIALTY

ATTENDING PHYSICIAN  
PRIMARY CARE PHYSICIAN  
WARD LOCATION

## Outputs Menu

### Audit File Inquire

#### Introduction

The Audit File Inquire option allows you to pick a fall out record and view its audit file entry. The audit file data includes information on who modified the record, when it was modified, and what modification was performed.

The date/time tells you when the monitor ran or when manual edit captured the fall out record or edited it.

The only prompts are for patient name and device.

#### Example

```
-----  
MONITORING SYSTEM AUDIT TRAIL          DEC  9,1998  10:34    PAGE 1  
PATIENT  
DATE/TIME          ACTION          USER  
COMMENT  
-----  
18  ONE,TEST  
  
OCT 29,1998  08:22          OPEN          JOHN,EDWARD  
MANUAL ENROLLED FALL OUT  
  
OCT 29,1998  08:22          EDIT          PARKS,MARTHA  
MANUAL EDIT OF FALL OUT DATA
```

# Outputs Menu

## Auto/Manual Enroll Monitors Run

### Introduction

The Auto/Manual Enroll Monitors Run option produces a report that shows whether or not auto enroll ran and, if it did, which monitors were run.

### Example

Monthly, Quarterly, Semi-Annually, Yearly, Fiscal Yearly, User Selectable  
Select date range: User Selectable

Enter beginning and ending dates for the desired time period:

Beginning Date: 7 16 98 (JUL 16, 1998)  
Ending Date: JUL 16,1998// <RET> (JUL 16, 1998)

Range selected: JUL 16,1998 to JUL 16,1998

DEVICE: HOME// <RET> RIGHT MARGIN: 80// <RET>

```

                                AUTO/MANUAL ENROLL MONITORS RUN
                                PERIOD FROM JUL 16,1998 TO JUL 16,1998
                                JUL 19,1998
                                PAGE: 1
AUTO ENROLL RUN DATE
MONITOR CODE (a/m=AUTO/MANUAL)  MONITOR TITLE
-----
JUL 16,1998
Copy of XX-1 (a)                  Copy of DEATH                  JUL 17,1998
FALL-1 (m)                       FALL MONITOR                   JUL 17,1998
LOS-1 (a)                        LOS ON WARD                    JUL 17,1998
MEM-1 (m)                        MANUAL ENROLL MONITOR         JUL 17,1998
NEW-9 (a)                        BRAND NEW MONITOR             JUL 17,1998
XX-1 (a)                         DEATH                         JUL 17,1998
XX-2 (a)                        DEATH 2                      JUL 17,1998
XXS-1 (a)                        DEATH ON SERVICE              JUL 17,1998
```

**Outputs Menu**  
**Build a Monitor Worksheet**

**Introduction**

This option is used to print a blank worksheet that can be used to collect the information you need to build a monitor. The only prompts are for number of worksheets to print and device.

**Example**

Build a Monitor Worksheet

1. Shortened code name or number: \_\_\_\_\_

2. Title: \_\_\_\_\_

3. Service: \_\_\_\_\_

4. Standard of Care: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. Clinical Indicator: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Outputs Menu

## Build a Monitor Worksheet

### Example

Group Name: \_\_\_\_\_ Parent File: \_\_\_\_\_

Group Members: \_\_\_\_\_

What other information is required by each condition? \_\_\_\_\_

---

---

---

---

Which conditions define the denominator (sample)?

---

---

9. Choose which conditions define the fall outs and what is their relationship to each other? Use & (and), ! (or), ' (not), and parentheses () to specify the relationship between two or more conditions. Example: (C1&C2)!(C3&C4)

---

10. What is the relationship between the conditions that define the denominator (sample)? Use & (and), ! (or), ' (not), and parentheses () to specify the relationship between two or more conditions. Example: (C1&C2)!(C3!C4)

---

11. What condition defines the date of the event: \_\_\_\_\_

12. Time Frame: (Choose only one.)

- |   |  |
|---|--|
| <input type="checkbox"/> Annually             | <input type="checkbox"/> Monthly       |
| <input type="checkbox"/> Daily                | <input type="checkbox"/> Quarterly     |
| <input type="checkbox"/> Fiscal Semi-Annually | <input type="checkbox"/> Semi-Annually |
| <input type="checkbox"/> Fiscal Yearly        | <input type="checkbox"/> Weekly        |

13. Threshold: \_\_\_\_\_

If this is a percent threshold, should the threshold be met when the calculated percentage is (high) >= or (low) <= the threshold.

14. For percent thresholds, the Minimum Sample Size: \_\_\_\_\_

For numeric thresholds, the Pre-Threshold Alert Level: \_\_\_\_\_

15. Do you want to allow 'duplicate' fall outs during the time frame: Yes / No







# Outputs Menu

## Fall Out File Inquire

### Introduction

This option allows you to see any patient in the FALL OUT file (#743.1) and all the data associated with that fall out.

### Example

Select PATIENT: **ONE,TEST** XX-1 05-07-91@110000 03-06-23 `123456789  
EMPLOYEE

Another one: <RET>

DEVICE: HOME// <RET> RIGHT MARGIN: 80// <RET>

\*\* This information is confidential in accordance with Title 38 U.S.C. 5705 \*\*

```
=====
NAME: ONE,TEST          MONITOR: XX-1 (a)
EVENT DATE: MAY 7,1998@11:00  CREATION DATE: MAY 7,1998

AGE                      68
DATE OF BIRTH            MAR 6,1923
DATE OF DEATH            MAY 7,1998@11:00
MARITAL STATUS           MARRIED
SERVICE CONNECTED?     NO
SOCIAL SECURITY NUMBER    123456789
=====
```

## Outputs Menu Group File Inquire

### Introduction

This option provides you with the name of the group, what file the group is from, and the group members.

### Example

Select GROUP: **SUBSTANCE ABUSE**      FACILITY TREATING SPECIALTY

Another one: <RET>

DEVICE: HOME// <RET>              RIGHT MARGIN: 80// <RET>

```
=====
GROUP: SUBSTANCE ABUSE                      FILE: FACILITY TREATING SPECIALTY
MEMBERS:
      SUBSTANCE ABUSE
=====
```

## Outputs Menu

### Monitor Description Report

#### Introduction

The Monitor Description Report option produces an output which shows all the fields which make up the selected monitor(s). Some of these fields may include title, code, start and end dates, clinical indicator, and standard of care.

The report can be sorted by either service or monitor.

#### Example

Sort report by Service or Monitor: Service// **MONITOR**

Select MONITOR: **PSY-1**      LOS ON SUBSTANCE ABUSE      FINISHED

Another one: **PSY-2**

Another one: **<RET>**

DEVICE: HOME// **<RET>**      RIGHT MARGIN: 80// **<RET>**

# Outputs Menu

## Monitor Description Report

### Example

```
MONITOR DESCRIPTION REPORT                                JUL 17,1998
                                                         PAGE: 1
=====
CODE: PSY-1 (a)                                           TITLE: LOS ON SUBSTANCE ABUSE
SERVICE: PSYCHIATRY                                     SWITCH: On      START: JUL 17,1998      END:
STATUS: Finished                                         THRESHOLD: 5     ALERT LEVEL: 4
TIME FRAME: Quarterly                                   HI/LO %:  n/a     DUPLICATES:  Yes

STANDARD OF CARE
-----

CLINICAL INDICATOR
-----

RATIONALE                                               EXPLANATION
-----
Problem Prone
Other

This monitor is looking at the adequacy of
discharge planning for those patients whose
stays exceed the designated 28 days.
```

```
MONITOR DESCRIPTION REPORT                                JUL 17,1998
                                                         PAGE: 1
=====
CODE: PSY-2 (a)                                           TITLE: LOS SUBST ABUSE % >28 DAYS
SERVICE: PSYCHIATRY                                     SWITCH: Off     START: JUL 17,1998      END:
STATUS: Under Construction                               THRESHOLD: 1%   MIN SAMPLE: 20
TIME FRAME: Quarterly                                   HI/LO %:  High  DUPLICATES:  Yes

STANDARD OF CARE
-----

CLINICAL INDICATOR
-----

RATIONALE                                               EXPLANATION
-----
Problem Prone
Other

This monitor will be used to compare
quarterly figures/percent of patients whose
stays exceed 28 days to number of
admissions.
```



# Outputs Menu

## Patients With Multiple Fall Outs

### Introduction

The Patients With Multiple Fall Outs option allows you to choose a group of monitors, range of dates, and minimum number of fall outs to appear on the report. The fall outs (patients) must have one fall out within the selected monitor(s).

### Example

Select MONITOR: **A**

By 'A' do you mean all '3' QA MONITOR CODES? YES// **<RET>** (Yes)

Another one: **<RET>**

Minimum number of fall outs per patient:(1-99): **2**

Monthly, Quarterly, Semi-Annually, Yearly, Fiscal Yearly, User Selectable  
Select date range: **User Selectable**

Enter beginning and ending dates for the desired time period:

Beginning Date: **1/1/98** (JAN 01, 1998)

Ending Date: JAN 1,1998// **6/1/98** (JUN 01, 1998)

Range selected: JAN 1,1998 to JUN 1,1998

DEVICE: HOME// **<RET>** RIGHT MARGIN: 80// **<RET>**

PATIENTS WITH MULTIPLE FALL OUTS (MIN=2) JUL 17,1998  
PERIOD FROM JAN 1,1998 TO JUN 1,1998 PAGE: 1

\*\* This information is confidential in accordance with Title 38 U.S.C. 5705 \*\*

PATIENT	EVENT DATE	MONITOR TITLE	SOCIAL SECURITY NUMBER	MONITOR CODE
ONE, TESTPATIENT			123-45-6789	
	MAY 21,1998	DEATH	XX-1 (a)	
	MAY 21,1998	LOS ON WARD	LOS-1 (a)	

# Monitoring System User Menu

## Fall Out Edit

### Introduction

The Fall Out Edit option allows you to add a new fall out or edit an existing one. The selected monitor status must be *Finished* in order to utilize this option.

This option must be used to enter data for any monitors whose condition is Manual Enroll.

### Example

Select MONITOR: **CAT-1**    XXX TEST MANUAL ENTRY    FINISHED

Select PATIENT: **ONE,TEST**    03-03-33    123456789    EMPLOYEE

EVENT DATE: **T-4**

Searching FALL OUT file for this patient/monitor...

No fall outs found for this patient/monitor.

Are you adding

ONE,TEST

123-45-6789

JUL 14,1998

XXX TEST MANUAL ENTRY

CAT-1 (m)

as a new Fall Out record? **Y**    (Yes)

PATIENT: ONE,TEST// **<RET>**

MONITOR: CAT-1// **<RET>**

EVENT DATE: JUL 14,1998// **<RET>**

AGE: (1-130): 58// **<RET>**

DIAGNOSIS [SHORT]: NASAL POLPYS Replace **<RET>**

FACILITY TREATING SPECIALTY: OTOLARYNGOLOGY// **<RET>**

PRIMARY CARE PHYSICIAN: DOCTOR,MARK// **<RET>**

SOCIAL SECURITY NUMBER: 123456789// **<RET>**

WARD LOCATION: 3W// **<RET>**

Select PATIENT: **<RET>**

Select MONITOR: **<RET>**

# Monitoring System User Menu

## Sample Size Edit

### Introduction

This option allows the user to edit the sample size for a selected date and selected monitor.

### Example

Select MONITOR: **CAT-1** XXX TEST MANUAL ENTRY FINISHED

Date for SAMPLE SIZE data: TODAY// **<RET>** (JUL 21, 1998)

SAMPLE SIZE data was last edited: JUL 14,1998  
Current FALL OUTS: 2  
Current SAMPLE SIZE: 8

Add/Subtract SAMPLE SIZE (-1000000 -> 1000000): **2**

New SAMPLE SIZE: 10

Date for SAMPLE SIZE data: **T** (JUL 21, 1998)

SAMPLE SIZE data was last edited: JUL 21,1998  
Current FALL OUTS: 2  
Current SAMPLE SIZE: 10

Add/Subtract SAMPLE SIZE (-1000000 -> 1000000): **<RET>**

Date for SAMPLE SIZE data: **<RET>**

Select MONITOR: **<RET>**

## **Monitoring System User Menu Outputs Menu**

Ad Hoc Fall Out Report  
Fall Out File Inquire  
Monitor Description Report  
Monitor History Report  
Patients With Multiple Fall Outs

The options contained on this menu are the same as those found on the Outputs Menu of the Monitoring System Manager Menu. Please refer to the option documentation for these options in the Monitoring System Manager Menu, if necessary.

# Glossary

Alert Level	The level at which a bulletin is sent announcing that this level (pre-threshold) has been met. This is only meaningful for non-percentile thresholds. See Bulletin when Min Sample/Alert Level Met.
Allow Duplicate Fall Outs	Answering YES to this question allows an event to fall out multiple times for the same patient within a given time frame. Answering NO will allow the event to fall out only once per patient per time frame.
Auto Enroll Monitor	This field determines whether or not this is an auto enroll monitor. You should answer YES to this field only if this monitor can be auto enrolled. Your answer will determine which conditions you will be allowed to select.
Auto Run Auto Enroll	This refers to the nightly automatic runs that scan <b>VISTA</b> for patients who meet the criteria of the monitors which are set up in the QA MONITOR file (#743).
Bulletin at End of Time Frame	Enter YES if a bulletin should be sent at the end of each time frame.
Bulletin Mail Group	This field contains the name of the mail group that the threshold, minimum sample, and end of time frame bulletins will be sent to.
Bulletin when Min Sample/Alert Level Met	Enter YES if a bulletin should be sent when the minimum sample is met or when the alert level is met for non-percentile thresholds.
Bulletin when Threshold Met	Enter YES if a bulletin should be sent when the threshold is met the first time within the time frame.
Clinical Indicator	This word processing field defines the criteria necessary to meet the standard of care.

Code	This can either be free text or a predetermined list (of initial identifying letters or numbers) as defined by the site so that monitors can be grouped and easily retrieved by the service, section, etc.
Condition	A condition applies a True/False test on selected data elements in a patient's record. If the result of the test is true, that patient's record is captured for further processing.
Condition for Date of Event	Enter the condition number that should be used to capture the event date.
Contributes to Sample	This field determines whether or not this condition contributes to the sample size (denominator). This affects how information is collected to determine the size of the sample (denominator).
End Date	This field determines when the monitor should stop capturing data or when manual entry of data for this monitor is no longer allowed.
Fall Out	A fall out is a patient who has been found to meet the criteria of a monitor. When a patient falls out a record is created in the FALL OUT file (#743.1) for that patient.
Fall Out Relationship	This field specifically states the relationship between the conditions entered by the user. The user may use & (and), ! (or), ' (not), and parentheses () to specify the relationship.
Group	A group is a list of similar items. An example would be a group of wards that are all psychiatry wards. Groups may have as many or as few group members as desired.
Hi/Lo Percent	If the user chooses "Hi", the threshold will be met when the percentage is calculated to be $\geq$ to the threshold. If the user chooses "Lo", the threshold will be met when the percentage is calculated to be $\leq$ the threshold. Hi/Lo is only meaningful for percent thresholds.

Manually Run Auto Enroll	Used to manually queue the auto enroll batch job. This option is used to run the auto enroll if one or more days in the past was missed due to down time.
Minimum Sample	This field defines the minimum sample size (denominator) that must be reached before threshold checking occurs. Minimum sample is meaningful only for percent thresholds.
Monitor	A monitor is made up of a set of conditions (criteria) and the relationships among those conditions. Monitors scan <b>VISTA</b> on a nightly basis for patients who meet the monitors criteria.
Monitor Status	Answer FINISHED to this field only when you are sure you are completely finished entering/editing/building this monitor. Once you answer FINISHED, you will no longer be able to edit selected monitor fields.
On/Off Switch	This field controls whether or not a monitor is active. For an auto enroll monitor to capture data, this switch must be turned on. For a manual entry monitor to be selectable, the switch must be turned on. When you wish to stop using a monitor, this switch should be turned off.
Other Data to Capture	When a patient meets the conditions of the monitor and falls out, the other data to capture entries define which data elements in the patient's record should be collected.
Parameter	Parameters further narrow down the definition of a condition. The format of a parameter is determined by the condition.
Print Daily Fall Out List	This field determines whether or not a generic list of all fall outs, sorted by monitor, is printed daily.

Print Daily Worksheets	This field determines whether worksheets are printed daily for all fall outs for this monitor. For this to work, the worksheet must first be created by a programmer and linked to the monitor.
QM	Quality Management
QM Coordinator	An individual tasked with the oversight of QM activities in the medical center.
Rationale	This field defines the rationale for the use of this monitor. You may select all that apply. (high volume, high risk, problem prone, other)
Sample Relationship	Enter the relationships among the conditions. This field specifically states the relationship between the conditions that contribute to the sample size. The user may use & (and), ! (or), ' (not), and parentheses () to specify the relationship.
Sample Size	The total number of patient records scanned by a monitor.
Service	This field will allow the manager to track what monitors are currently being used by each service. The service entered has nothing to do with the conditions chosen or what data is auto enrolled.
Standard of Care	This word processing field defines the standard of care to be monitored.
Start Date	This field determines when the monitor should start to capture data or when manual entry of data for this monitor may begin.
Threshold	Threshold defines the number or percentage of fall outs after which some specific action will occur.

Time Frame

Time frame is the period of time over which the program begins capturing data and then sums up the data to start all over again with the beginning of the next similar time frame.

Title

This is a short free text name determined by the user for this monitor.

**VISTA**

Veterans Health Information Systems and  
Technology Architecture

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