Event Capture System 2.0
Graphical User Interface

User Guide

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1 Introduction

The *Event Capture System (ECS) Graphical User Interface (GUI) User Guide* provides instructions for using the Event Capture options within the GUI setting. The target audience for this manual includes the users of the Event Capture package, Tier 2 VistA Support Application Coordinators (ACs), and other software users.

The GUI provides a consistent, event-driven, Windows® style user interface for Event Capture.

The Event Capture software provides a mechanism to track and account for procedures and delivered services that other Veterans Health Information Systems and Technology Architecture (VistA) packages do not handle. The procedures and services tracked through Event Capture are associated with the following:

- The patient to whom they were delivered
- The provider requesting the service or procedure
- The Decision Support System (DSS) Unit responsible for delivering the service

DSS Units typically represent the smallest identifiable work unit in a clinical service at a medical center. Veterans Affairs Medical Centers (VAMCs) define the DSS Units. A DSS Unit can represent any of the following:

- An entire service
- A section of a service
- A small section within a section
- A medical equipment item used in patient procedures

The user must define the following items for every DSS Unit:

- **Service:** The service associated with the DSS Unit.
- **Cost Center:** The fiscal identifier for the service using the DSS Unit.
  Cost Centers are defined in detail in *Volume XIII — Cost Accounting* of the Financial Policy Volumes on the VA's Office of Financial Policy web site.
- **Medical Specialty:** The specialty section associated with the DSS Unit.

1.1 Purpose

The ECS GUI *User Guide* is intended for use as an instructional guide for using the Event Capture software. The user can use this manual in conjunction with the Event Capture GUI online help option.

Screen displays may vary among different sites, and the data may not appear on the monitor exactly as shown in this manual. Although ECS screens are subject to modification, the major menu options as they appear in this manual are fixed and are not subject to modification (except by the package developer).

1.2 Document Orientation

The following sub-paragraphs provide general information about how to use this document.

1.2.1 Organization of the Guide

This document is organized into the following major sections:

Introduction — This section provides a brief description of the purpose of the guide and an orientation into the document's structure and use.

System Summary — This section provides a general description of the system written in non-technical terminology, the purpose for which the system is intended, the system configuration, data flows, user access and continuity of operations.

Getting Started — This section provides a general walkthrough of the system from initiation through exit. The logical arrangement of the information enables functional personnel to understand the sequence and flow of the system.

Using the Software *—This section serves as reference to the user, covering vital aspects of this t*ool.

- **Data Entry** — ECS is programmed to allow the users to enter records and edit specific fields.
- **Spreadsheet** — ECS allows the uploading of data through spreadsheets. There are two types of spreadsheets: Regular Spreadsheets and State Veterans Home Spreadsheets. Information for both types is included in this guide.
- **Reports** — ECS Reports are designed according to Managerial Cost Accounting Office (MCAO) specifications. Users have the option of previewing the report, exporting the report into an Excel spreadsheet, or printing a hardcopy. Some reports are only accessible to users with the manager security key (ECMGR).
- **Management Menu** — This option accesses the menus needed for management of the Event Capture software. It includes, but is not limited to, allocation of DSS Units, assignment of users to DSS units, addition of local procedures and categories, and the creation of Event Code Screens.

Troubleshooting — This section provides general troubleshooting advice on issues encountered by users.

Appendix — The following appendices are included in this guide:

- **Acronyms and Abbreviations** — This section provides the user with a list of abbreviations and acronyms used throughout the document.
- **Glossary** — This section provides the user with definitions of terms used throughout the document.
- **ECS Package Administrative Messages —** This section provides the user with examples of relevant ECS notifications.
- **Index** — This section provides the user with an Index of major topics of interest.

1.2.2 Assumptions

This guide was written with the following assumed experience/skills of the audience:

- User has basic knowledge of the operating system (such as the use of commands, menu options, and navigation tools).
- User has been provided the appropriate active roles, menus, and security keys required for ECS.
- User is using ECS to perform his/her job.
- User has validated access to ECS.
- User has completed any prerequisite training.

1.2.3 Disclaimers

The following disclaimers apply to all Department of Veterans Affairs (VA) user documentation.

1.2.3.1 Software Disclaimer

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1.2.3.2 Documentation Disclaimer

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1.2.4 Documentation Conventions

To avoid displaying sensitive information regarding patients and staff, the examples in this guide contain pseudonyms or scrambled data instead of real names. Patients and staff will be referred to as “ECPATIENT, ONE”, “AAECPROVIDER, ONE”, or “USER, ONE.” Scrambled data are a series of random letters that replace a real name (e.g., “AAADY, JWHTRE”). Likewise, real social security numbers (SSNs), real addresses, and other personal identifiers are not used.

Note

- Many examples of previews or exported reports in this manual will only include a portion of the output produced for the purpose of saving space and maintaining clarity.
- Internal document links and VDL links in this manual are displayed in blue type.

1.2.5 References and Resources

The documentation for Event Capture v2.0 includes the following:

- *Event Capture Deployment, Installation, Back-out and Rollback Guide* (DIBRG)
- *Event Capture Patch Description* (PD)
- *Event Capture Technical Manual* (TM)

These documents can be found on the VA Software Document Library (VDL) website.

Patch information and documentation is also available online at the MCA Learning Community for Event Capture website.

1.3 National Service Desk and Organizational Contacts

The three tiers of support documented herein are intended to restore normal service operation as quickly as possible and minimize the adverse impact on business operations, ensuring that the best possible levels of service quality and availability are maintained.

Table 1 lists organizational contacts needed by site users for troubleshooting purposes. Support contacts are listed by name of service responsible to fix the problem, description of the incident escalation, associated tier level, and contact information (email and phone number).

Table 1: Tier Support Contact Information

Name	Role	Org	Contact Info
Local ECS Package Manager	Tier 0 Support	Veterans Health Administration (VHA)	ECS Package Manager/Site Dependent The MCAO Phone List can be found on the VA's MCAO online contact page.
Local Managerial Cost Accounting (MCA) VISN Coordinator	Tier 0 Support	VHA	Site Dependent The MCAO Phone List can be found on the VA's MCAO online contact page.
OIT National Service Desk	Tier 1 Support	OIT	National Service Desk Incident Management Automated Notification Reporting (ANR) Tool

2 System Summary

The Event Capture System (ECS) is a VistA Class I workload reporting system supporting operations of the VA MCAO. There are several VHA national programs mandating utilization of ECS in place of, or to augment, other workload capture information systems. For example, ECS is leveraged when programs cannot report workload in the form of Current Procedural Terminology (CPT) codes. Other times, ECS allows for more precise workload capture and reporting than otherwise possible through another VistA system.

Event Capture with all patches installed provides the following functions:

- Allows each VAMC to utilize the software for its own resource/costing needs
- Implements DSS Units
- Assigns user access
- Allows single and batch data entry for patient procedures
- Generates reports for workload and other statistical tracking
- Provides a graphical user interface (GUI) to the ECS application
- Allows user to upload patient encounter data to Event Capture from a spreadsheet
- Allows user to switch between Computerized Patient Record System (CPRS) and ECS without having to log back into the Event Capture (EC) GUI.exe

2.1 System Configuration

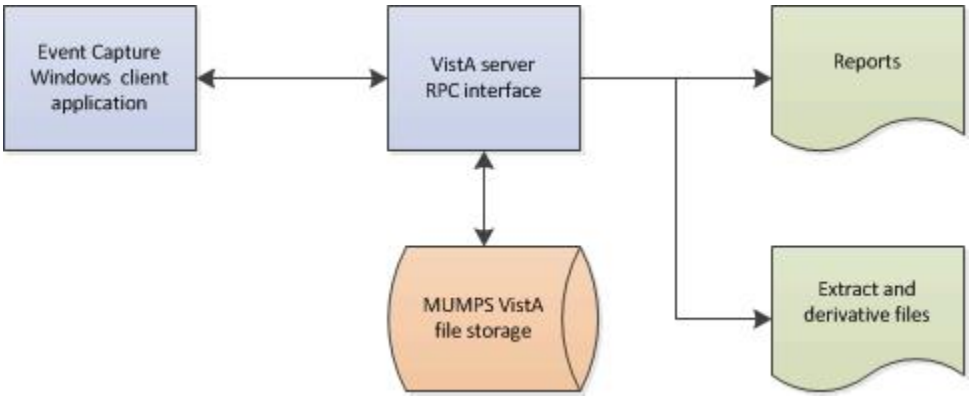
Please refer to the *Event Capture Technical Manual* for details related to system and site configuration.

2.2 Data Flows

ECS captures both inpatient and outpatient workload and uses VHA-wide standardized procedures which help aid benchmarking and workload analysis. ECS captures basic resource utilization data, creates monthly extracts, and electronically transmits to DSS, Patient Care Encounter (PCE), and billing offices for processing which facilitates workload analysis, cost analysis, and transmission of billing.

Figure 1 represents the ECS data flow.

Figure 1: ECS Data Flow Diagram



2.3 User Access Levels

Security keys are assigned in VistA using the option Key Management main menu and then choosing the submenu Allocation of Security Keys.

ECS provides the following security key options for user access:

- **ECMGR**: Gives a user access to the ECS Management Menu — only for Event Capture managers.
- **ECACCESS**: Gives a user the ability to grant or remove access to DSS Units that they have access to. Note that if the user also has the ECMGR key, ECACCESS will not have any effect.
- **ECALLU**: Gives a user access to all DSS Units (super user). This key should be assigned only to those managing the software (i.e., holders of the ECMGR key).
- **ECNORPT**: Restricts the user from accessing Event Capture reports.
- **ECSPSH**: Gives a user access to upload data from a spreadsheet (required for State Veterans Home Spreadsheet upload).

2.4 Continuity of Operations

Each site has a backup emergency plan in place in the event that the system goes down.

2.5 Section 508 Compliance

Section 508 of the Rehabilitation Act Amendments of 1998 requires that when Federal agencies develop, procure, maintain, or use electronic and information technology, they shall ensure that the electronic and information technology enables persons with disabilities to have access to, and use of, information and data that is comparable to the access to and use of information and data by persons who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

The Section 508 Accessibility Testing and Training Center (T&TC) was consulted and modifications to the GUI have been made to meet the requirements for Section 508 compliance. Event Capture was modified to enable screen readers to accurately interpret information on the screens. As a result, some buttons and boxes have been moved, replaced, or renamed, and some screen titles have been modified.

For more information on the VA Section 508 compliance efforts, please visit the Section 508 website.

2.5.1 Screen Readers

ECS has been evaluated for the accessibility of application content with multiple commercial screen readers. ECS has been tested to ensure all screens work properly when a screen reader is active.

3 Getting Started

Event Capture must be set up by using the options in the Event Capture Management Menu before any data can be entered. Access to this menu should be restricted to the ADPAC or Event Capture Package Manager and his/her designees. The Event Capture ADPAC should use the following steps as a guide for setting up the Event Capture software.

Step 1. Select security keys.

- See section 2.3 regarding User Access Levels for a description of ECS security keys.

Step 2. Select required VistA settings.

- Users must be assigned the EC GUI CONTEXT VistA menu option for the ECS GUI to work.

Step 3. Create an Event Capture Location.

- Create a location using the Location — Update Location Information option.

Note:

- The selected location must be in the INSTITUTION file (#4).
- At least one location must exist before DSS Units can be established.

Step 4. Establish DSS Units for each service.

- Contact each service for a list of its DSS Units, the names of its Event Capture users and the DSS Units for which they will enter data, and for individual product resource tracking needs.
- Use the DSS Unit — Add or Update DSS Units option to establish DSS Units for each service.

Note:

- At least one DSS Unit must exist before Event Code Screens can be created.

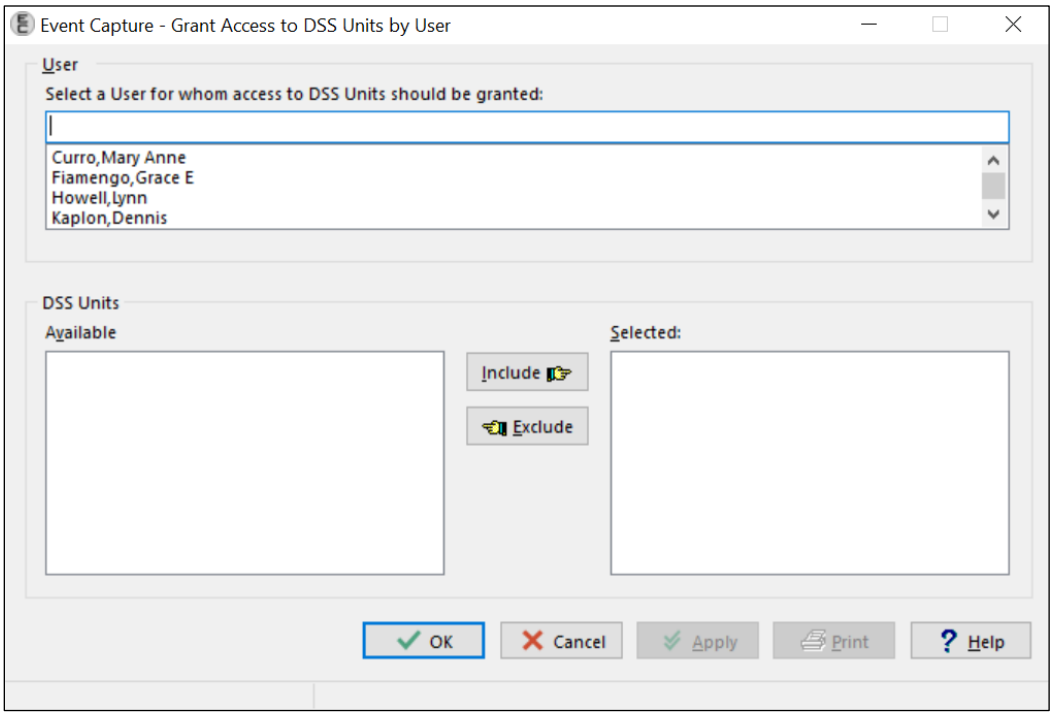
Step 5. Assign user access to specific DSS Units.

- Use the Access by User — Grant Access to DSS Units by User option (Figure 2) to assign user access to specific DSS Units for the users identified in Step 4.
- Assign the ECALLU security key only to those users who should have access to all DSS Units.

Note:

- Users must have access to DSS Units before they can begin entering data.
- Use the Access by User — Grant Access to DSS Units by User option to remove user access for a specific DSS Unit. Users with the ECALLU security key cannot be denied access to DSS Units.

Figure 2: Grant Access to DSS Units by User



Step 6. Create Categories.

- Use the Category — Add or Update Categories option to create categories before the user sets up Event Code Screens.

Note:

- Creating categories is optional.
- After completion of this step, the Category Report option on the Reports Menu can be used to print a report of the site's categories.

Step 7. Create or edit local procedures in the EC NATIONAL PROCEDURE file (#725).

- Use the Procedure — Add or Update Local Procedures option to enter new, or edit existing, local procedures in the EC NATIONAL PROCEDURE file (#725).
- Adding local procedures is optional and not encouraged.

Note:

- Before starting this step, use the National/Local Procedure Report option on the Reports Menu to print a list of procedures with their associated CPT codes. This report can be quite lengthy if it includes national procedures, so it should be queued to print to a device during non-peak hours.
- An associated CPT code must be entered to pass local procedures to PCE.
- Use this option to edit, but not delete, existing local procedures and to select an associated CPT code if this workload data should be sent to PCE.

Step 8. Use the Event Code Screen — Add or Update Event Code Screens option to:

- Create an Event Code Screen for each procedure tracked in the Event Capture software.
- Enter or edit an optional active associated clinic for DSS Units that are marked to send data to PCE. If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.
- Enter or edit an optional procedure Synonym.
- Set **Ask Reasons?** radio button to Yes or No.
- Enter or edit procedure default Volume.

Note:

- An Event Code Screen for the procedure must be created before it can be used for data entry.

Step 9. Optional: Print the Event Code Screens Sorted by DSS Units

- Use the Print Category and Procedure Summary (Report) option on the Reports Menu to print the Event Code Screens sorted by DSS Units.

Note:

- Data entry clerks might find the output generated by this report useful as a procedure reference guide.

Step 10. Event Capture set up is complete.

- Services can now enter data using the Data Entry options and provide summary reports using the Reports options.

3.1 Logging On

Event Capture is accessed through a desktop shortcut that points to the location of the EC GUI application (Figure 3). The executable file will be located on either a local or shared network drive. If the shortcut does not appear, refer to the Installation Guide for Event Capture, or ask the local support staff for assistance.

Figure 3: ECS GUI Icon

Step 1. Double-click the EC GUI shortcut to launch the application.

Once Event Capture is launched, there are 4 methods of providing user authentication:

- Single Sign-On (SSO) through CPRS
- Clinical Context Object Workgroup (CCOW)
- Personal Identification Verification (PIV) with Two-Factor Authentication (2FA)
- Access and Verify codes

3.1.1 Authentication via CPRS SSO

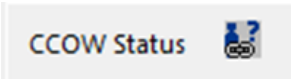
ECS user authentication can be achieved via SSO through CPRS. This design is intended to increase the use of Event Capture by clinicians currently using CPRS.

The interface between CPRS and Event Capture enables users to access Event Capture from within CPRS through single sign-on. This is achieved by selecting the Event Capture Interface in the CPRS Tool Menu which allows the user to enter Event Capture patient procedures. When accessing Event Capture in this way, both user and patient context are maintained. This CPRS feature requires set up by the local Office of Information and Technology (OIT) and/or the Clinical Application Coordinator.

3.1.2 Authentication via CCOW SSO

Event Capture includes CCOW SSO capability. If a user is signed onto another CCOW SSO-enabled system, launching Event Capture will not require the user to re-enter system Access and Verify codes. Likewise, if CCOW is enabled in Event Capture, other CCOW SSO compliant applications can use the current user's authentication credentials from Event Capture. The status of the CCOW SSO is shown via an icon on a panel in the upper-right hand corner of the Main Menu (Figure 4). The hover help will display "Clinical Link On" if Event Capture was accessed with CCOW SSO enabled or "Clinical Link Off" if it was not. In addition, the icon on the panel will indicate current CCOW status. The CCOW feature requires set up by the local OIT.

Figure 4: Event Capture CCOW Status

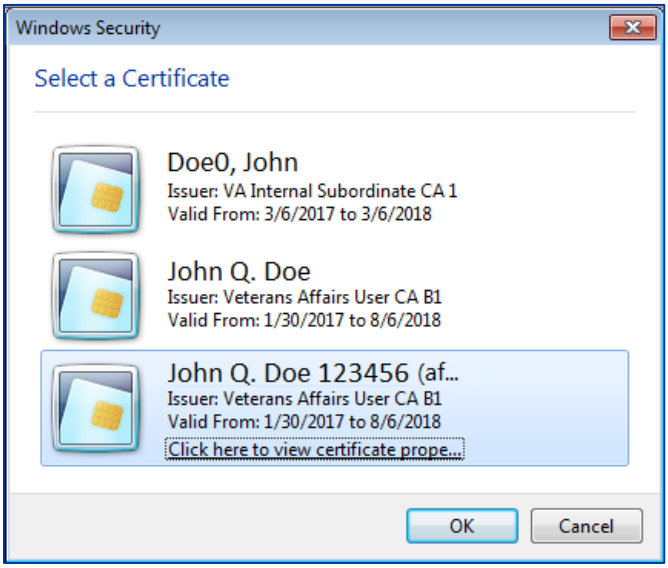


3.1.3 Authentication via Personal Identification Verification

Two-Factor Authentication adds an additional layer of security beyond a traditional username and password combination. Event Capture can obtain credentials from a PIV card and Personal Identification Number (PIN) combination. When Event Capture is first launched, it will attempt to use a PIV card for authentication.

Step 1. Select your PIV card certificate (Figure 5):

Figure 5: PIV Certificate Selection



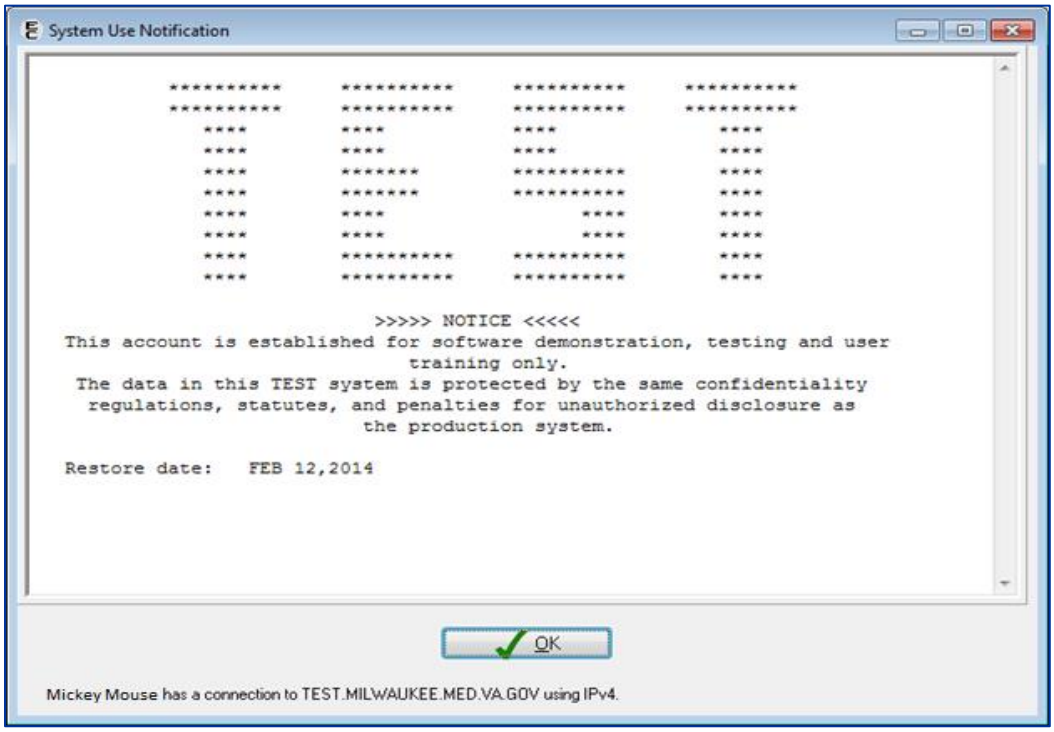
Step 2. Enter the PIN and press the OK button (Figure 6)

Figure 6: PIN Entry

If PIV authentication is successful, the System Use Notification will appear (Figure 7). Click the **OK** button to complete the login process.

If PIV authentication fails, the prompt for Access and Verify codes will appear.

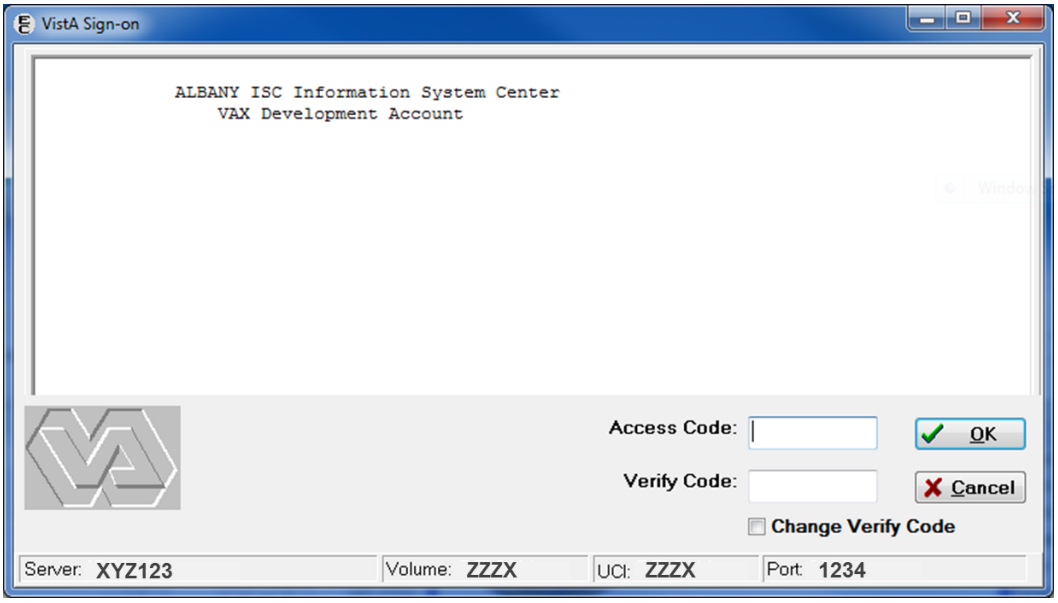
Figure 7: System Use Notification



3.1.4 Authentication via Access and Verify Codes

If PIV authentication fails, authentication will revert to the traditional Access and Verify code method of VistA login (Figure 8). When this happens, enter valid Access and Verify codes, and click the **OK** button.

Figure 8: VistA Login Screen



3.2 Event Capture Main Menu

The Event Capture software contains five possible main menu options. The availability of those options is dependent on the keys assigned to the user:

1. **Data Entry —** All users have access to the Data Entry option.
2. **Spreadsheet** — The user must hold the ECSPSH security key to have access to the Spreadsheet option.
3. **Reports** — Users with the ECNORPT security key will *not* have access to the Reports option (Figure 10).
4. **Management Menu** — The user must hold the ECMGR security key to have access to the Management Menu functions (Figure 9). Users without the ECMGR security key will have fewer reports available for selection than users with the ECMGR security key.
5. **Access by User** — Users with the ECACCESS security key, but not the ECMGR security key, will have access to the Access by User option (Figure 11).

Figure 9: User Holds the ECSPSH and ECMGR Security Keys

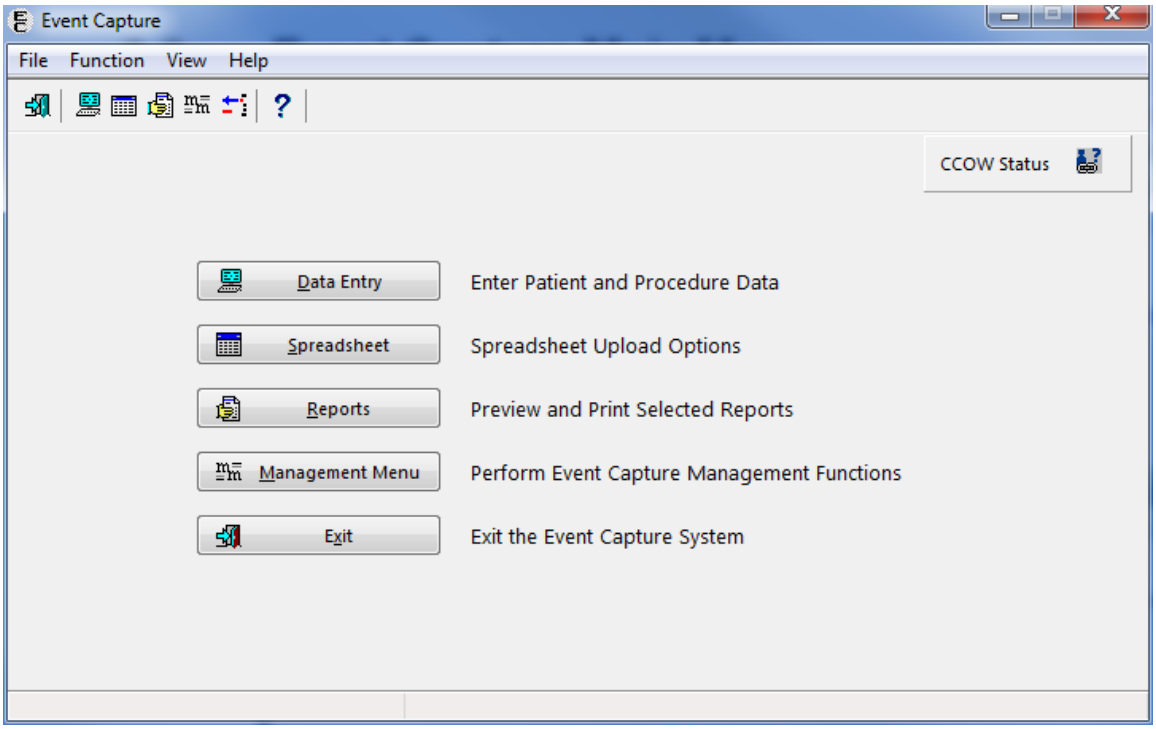


Figure 10: User Holds the ECSPSH, ECNORPT and ECMGR Security Keys

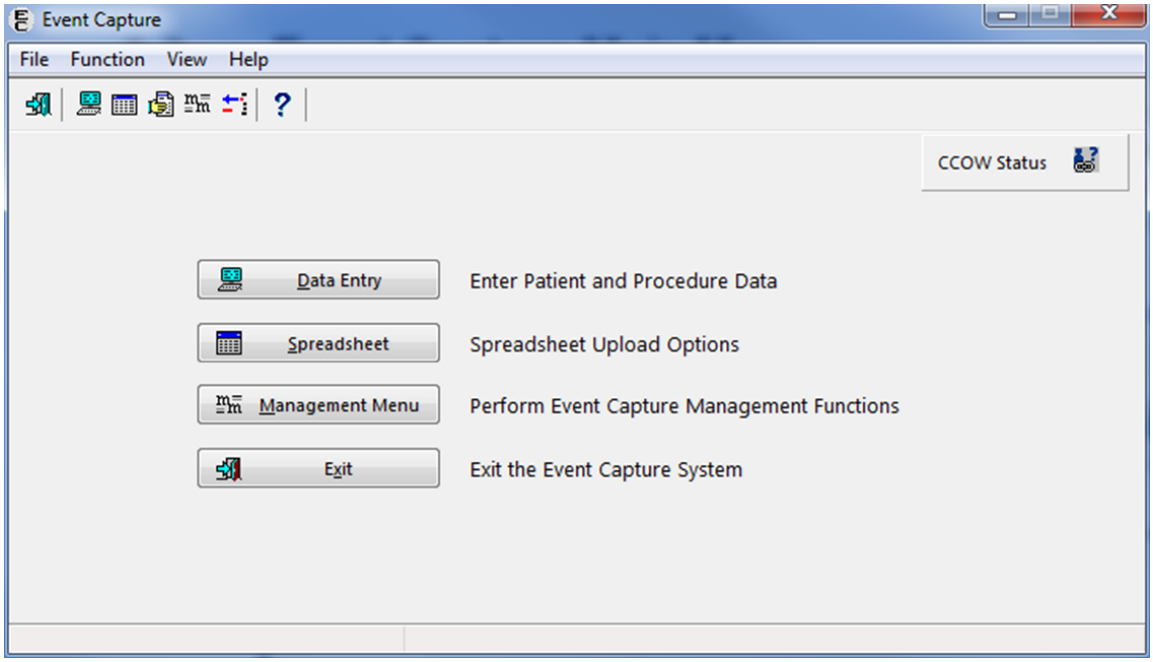
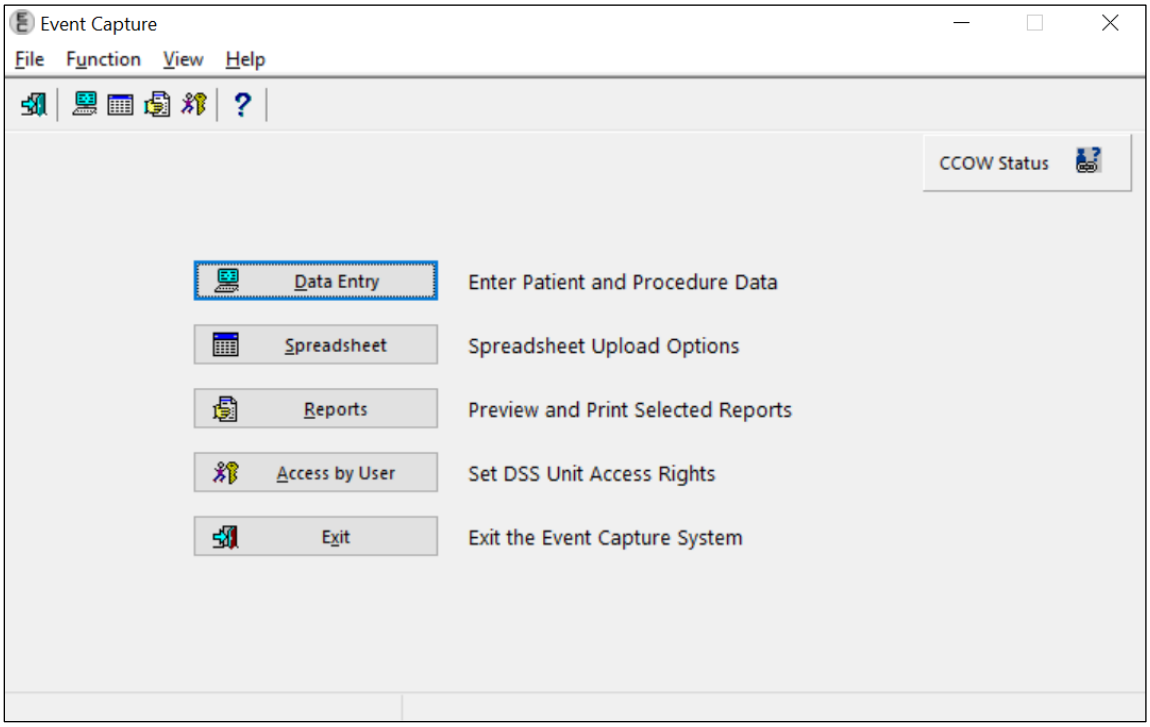


Figure 11: User Holds the ECSPSH and ECACCESS Security Keys



3.2.1 Icon Shortcuts

A toolbar is available with icons to access frequently used options quickly from the Main Menu in Event Capture (Figure 10).

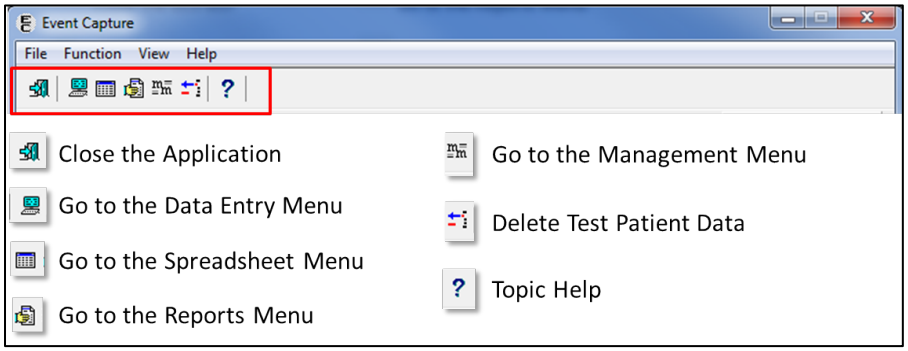
Before the User Starts

- Only users with the ECSPSH security key will see the Go to the Spreadsheet Menu toolbar option.
- Only users without the ECNORPT security key will see the Go to the Reports Menu toolbar option.
- Only users with the ECMGR security key will see the Go to the Management Menu toolbar option.
- Only users with the ECMGR security key will see the Delete Test Patient Data toolbar option.

What the User Will See

- Under the menu bar on the ECS Main Menu, the toolbar presents the most frequently used options (Figure 12).
- The number of toolbar options visible will depend upon the individual user's security key assignment.

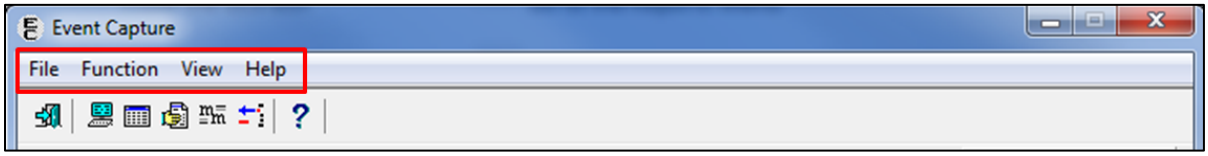
Figure 12: Icon Shortcuts



3.2.2 Menu Bar

The Event Capture menu bar (Figure 13) enables the user to access shortcut commands.

Figure 13: Main Menu Bar



Before the User Starts

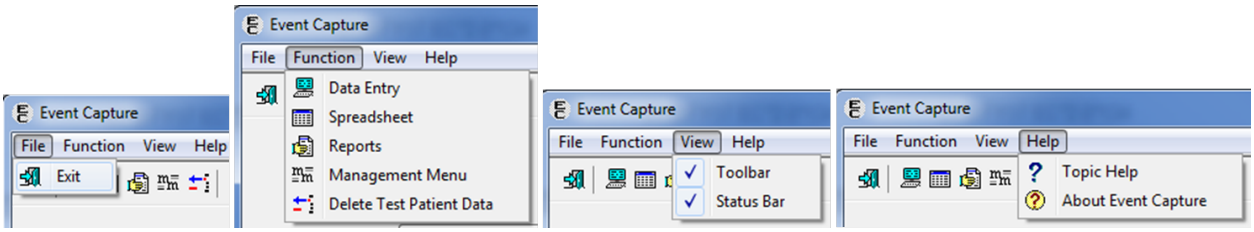
- Only users with the ECSPSH security key will see the Go to the Spreadsheet Menu toolbar option.
- Only users without the ECNORPT security key will see the Reports Menu option under the Function Menu.
- Only users with the ECMGR security key will see the Management Menu option under the Function Menu.
- Only users with the ECMGR security key will see the Delete Test Patient Data option under the Function Menu.

What the User Will See

- Under the Event Capture title bar on the ECS Main Menu, the menu bar presents the top-level commands (Figure 11).
- The File menu item enables the user to Exit the application.
- The Function menu item on the main window provides access to:
  - Data Entry
  - Spreadsheet (if the user has the proper security key)
  - Reports (if the user has the proper security key)
  - Management Menu (if the user has the proper security key)
  - Delete Test Patient Data (if the user has the proper security key)
- The View menu item enables the user to show or hide the Toolbar and Status Bar.
- The Help menu item provides topic-specific help, or information about the Event Capture system.

Figure 14 displays the menu bar options with expanded menus.

Figure 14: Main Menu Bar with Menus Expanded



3.2.3 Delete Test Patient Data

The Main Menu provides management users the ability to delete test patient data. Running this option ensures that reports will not contain test patient data.

Before the User Starts

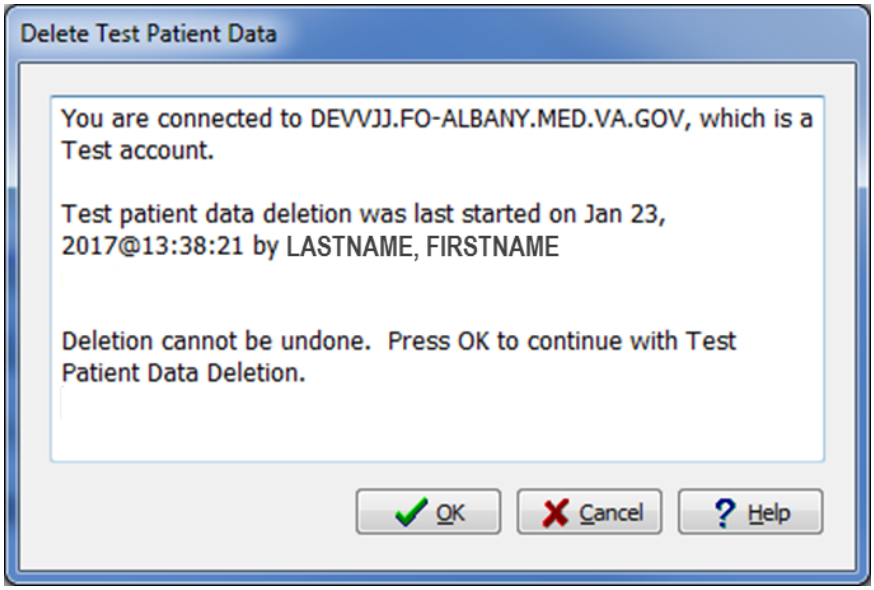
- Only users with the ECMGR security key will have access to the Delete Test Patient Data option.
- The Delete Test Patient Data option is only available on the ECS Main Menu.

- Test patient data entered for DSS Units CH103-109 is excluded from deletion when running this option.

What the User Will See

- After selecting the Delete Test Patient Data option from the ECS Main Menu (menu bar or toolbar), a Delete Test Patient dialog box will display (Figure 15).
- The Delete Test Patient dialog box informs the user to which account he or she is connected, the date and time the option was last run (if available) and the name of the person that last performed the option. The dialog also contains a warning message informing the user that deletion cannot be undone.

Figure 15: Delete Test Patient Data Dialog Box



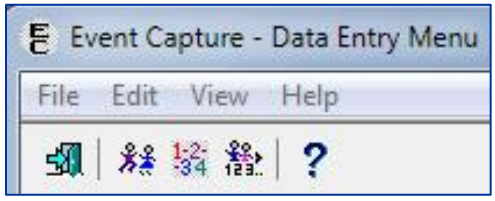
3.3 Menu Bar for Specific Functions

The menu bar for the four ECS functions are described in the following subsections.

3.3.1 Data Entry Menu Bar

The Data Entry menu bar consists of the File, Edit, View, and Help menus (Figure 16).

Figure 16: Data Entry Menu Bar Options

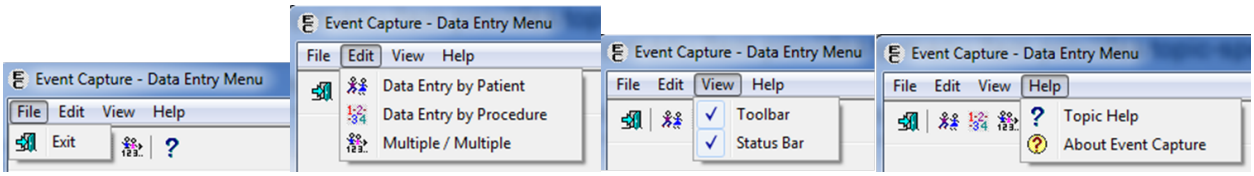


- The File menu item provides the option for the user to exit the window.

- The Edit menu item provides access to Data Entry by Patient, Data Entry by Procedure, and Multiple/Multiple functions.
- The View menu item enables the user to show or hide the Toolbar and Status Bar.
- The Help menu item provides topic-specific help, or information about the Event Capture System.

Figure 17 shows the Data Entry menu bar options with the expanded menus.

Figure 17: Data Entry with Menus Expanded



3.3.2 Spreadsheet Menu Bar

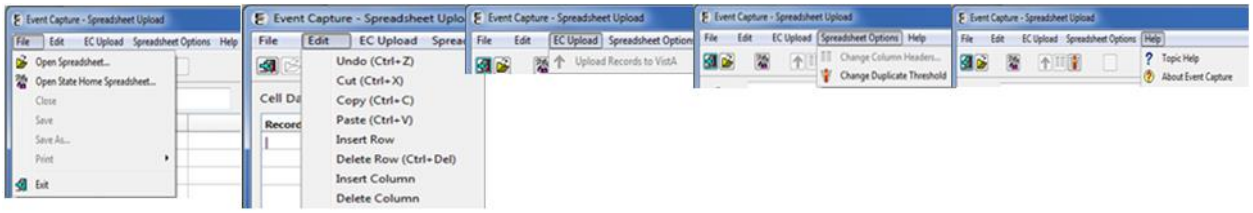
The Spreadsheet menu bar consists of the File, Edit, EC Upload, Spreadsheet Options (if the user has the proper security key), and Help menus (Figure 18).

Figure 18: Spreadsheet Menu Bar Options

- The File menu item enables the user to Exit the window as well as Open Spreadsheet, Open State Veterans Home Spreadsheet, Close, Save, Save As, and Print a file.
- The Edit menu gives the user the option to Undo, Cut, Copy, Paste, Insert Row, Delete Row, Insert Column, or Delete Column.
- The EC Upload menu item enables the user to Upload Records to VistA.
- The Spreadsheet Options menu item enables the user to Change Column Headers or Change Duplicate Threshold.
- The Help menu item provides topic-specific help, or information about the Event Capture System.

Figure 19 shows the Spreadsheet menu bar options with the expanded menus.

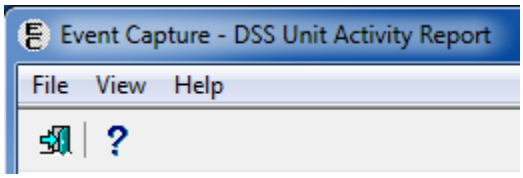
Figure 19: Spreadsheet Menu Bar with Menus Expanded



3.3.3 Reports Menu Bar

The Reports menu bar consists of the File, View, and Help menus (Figure 20).

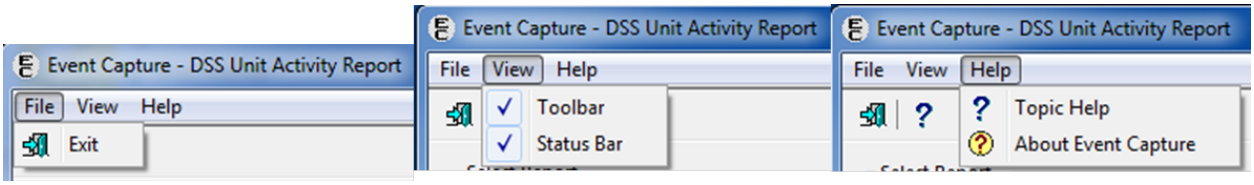
Figure 20: Reports Menu Bar Options



- The File menu item enables the user to Exit the window.
- The View menu item enables the user to show or hide the Toolbar and Status Bar.
- The Help menu item provides topic-specific help, or information about the Event Capture System.

Figure 21 shows the Reports menu bar options with the expanded menus.

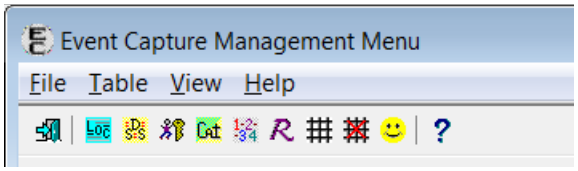
Figure 21: Reports Menu with Menus Expanded



3.3.4 Management Menu Bars

The Event Capture Management Menu bar consists of the File, Table, View, and Help menus (Figure 22).

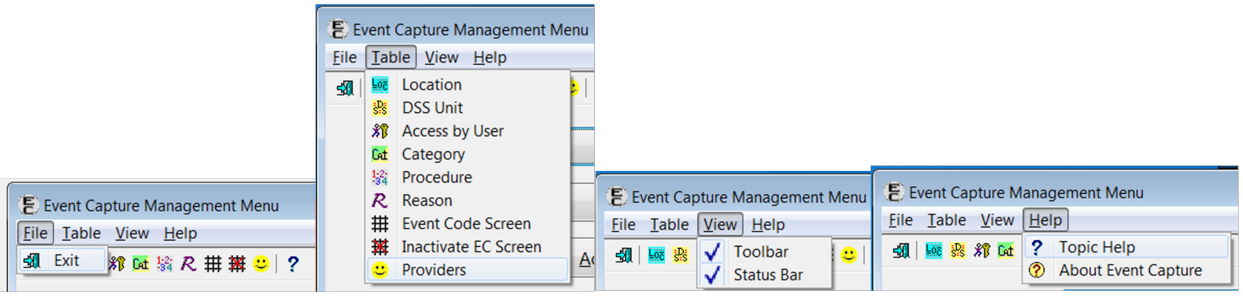
Figure 22: Management Menu Options



- The File menu item enables the user to Exit the window.
- The Table menu item provides access to Location, DSS Unit, Access by User, Category, Procedure, Reason, Event Code Screen, Inactivate EC Screen, and Providers functions.
- The View menu item enables the user to show or hide the Toolbar and Status Bar.
- The Help menu item provides topic-specific help, or information about the Event Capture system.

Figure 23 shows the expanded Management Menu bar options with expanded menus.

Figure 23: Management Menu with Menus Expanded



3.4 Changing User ID and Password

If PIV authentication is unavailable, users will need to use VistA access and verify codes to access ECS. To request changes to assigned access and verify codes, please contact the Office of Information Technology (OIT).

3.5 Exit System

From the Event Capture Main Menu, click the **Exit** button to exit the Event Capture GUI. Alternatively, from the same screen, users can go to **File** > **Exit**, or click the **Close** window button in the top-right corner of the screen.

3.6 Caveats and Exceptions

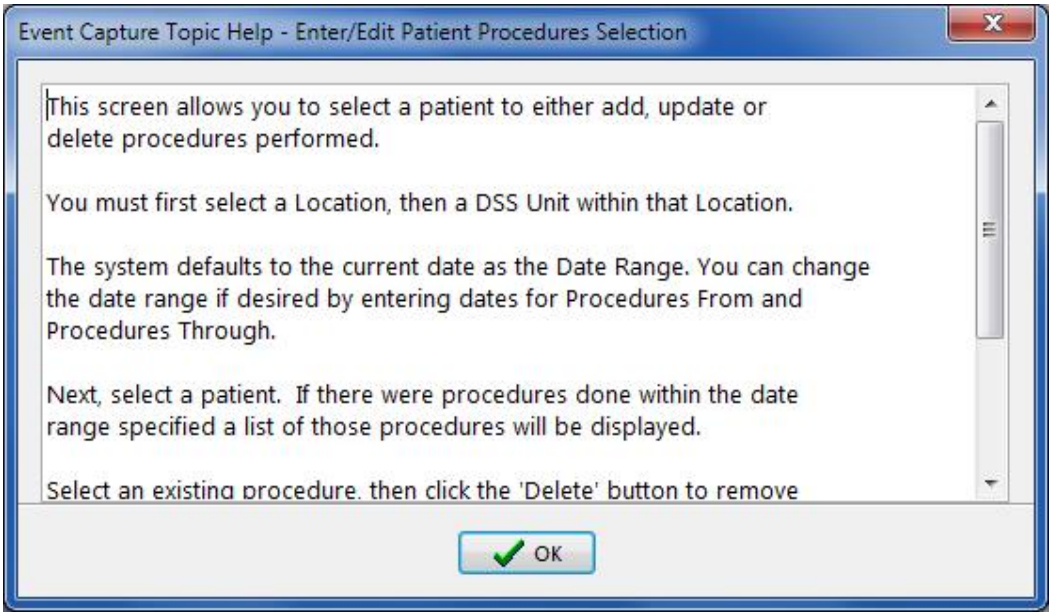
On all ECS GUI screens, the previous Location entry will be saved and used as the default on subsequent Location fields.

3.7 Online Documentation

Online help is available throughout the entire ECS GUI. To obtain online information for any screen, click the question mark button located on the toolbar ? or at the bottom-right corner of the screen, click the Topic Help button ? Topic Help. The information provided in the help menus corresponds to the information that is in this User Guide (Figure 24).

To obtain online information for a field, select that field and then press the <**F1**> key.

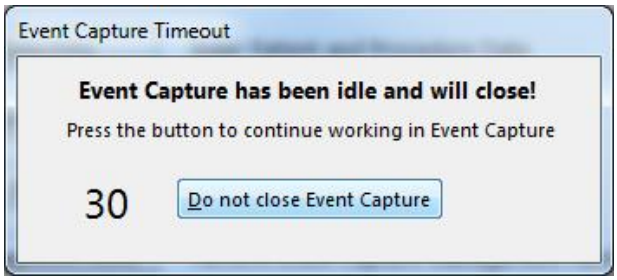
Figure 24: Online Help Screen Example



3.8 Timeout Feature

Event Capture includes a timeout feature consistent with CPRS. A countdown screen will display a warning of the pending timeout of the application when the Event Capture application is idle for a user-defined amount of time. If the user takes no action, the application will close. Click the "Do not close Event Capture" button to stay connected (Figure 25).

Figure 25: Event Capture Timeout Screen



The amount of time for the timeout feature is user-defined at the application server level.

4 Using the Software

The following subsections detail the Event Capture Main Menu options (Figure 9). Instructions are provided on how to perform tasks in each of the four main areas:

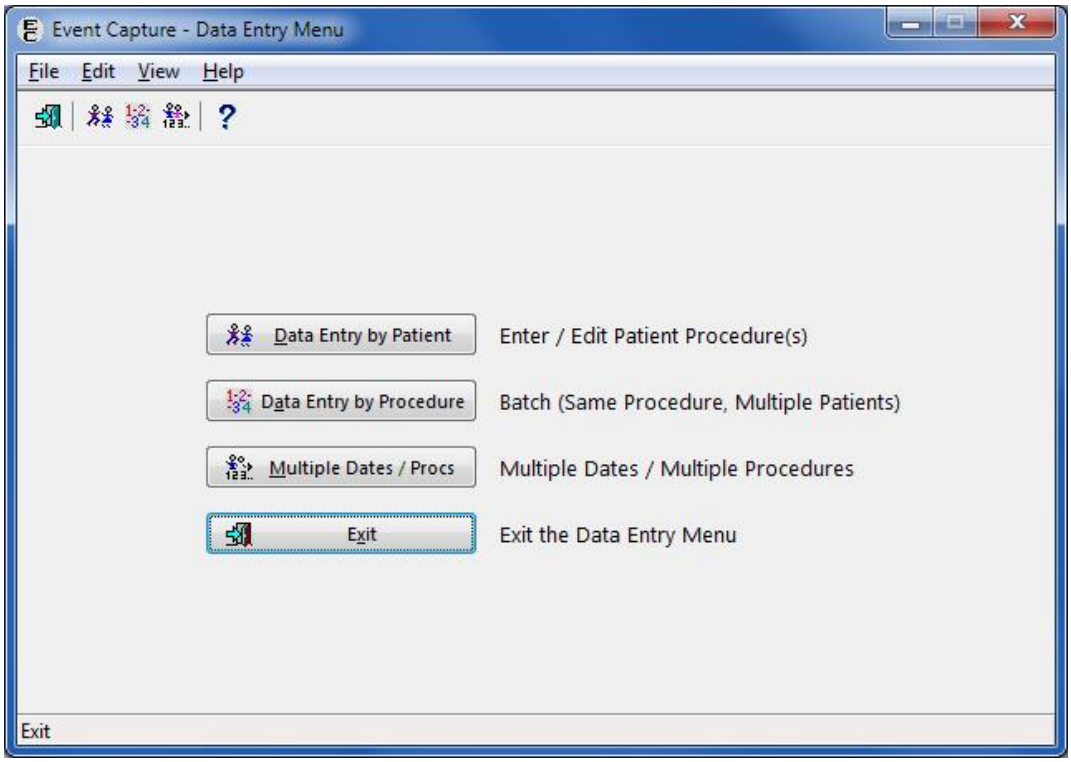
1. Data Entry
2. Spreadsheets
3. Reports
4. Management Menu

4.1 Data Entry Menu

The Data Entry Menu offers three options (Figure 26):

1. Data Entry by Patient — Enter/Edit Patient Procedures
2. Data Entry by Procedure — Batch (Same Procedure, Multiple Patients)
3. Multiple Dates/Procs — Multiple Dates / Multiple Procedures

Figure 26: Data Entry Menu



4.1.1 Data Entry by Patient

The Data Entry by Patient allows the user to enter a single procedure for one patient, edit an existing patient procedure, or delete an existing patient procedure.

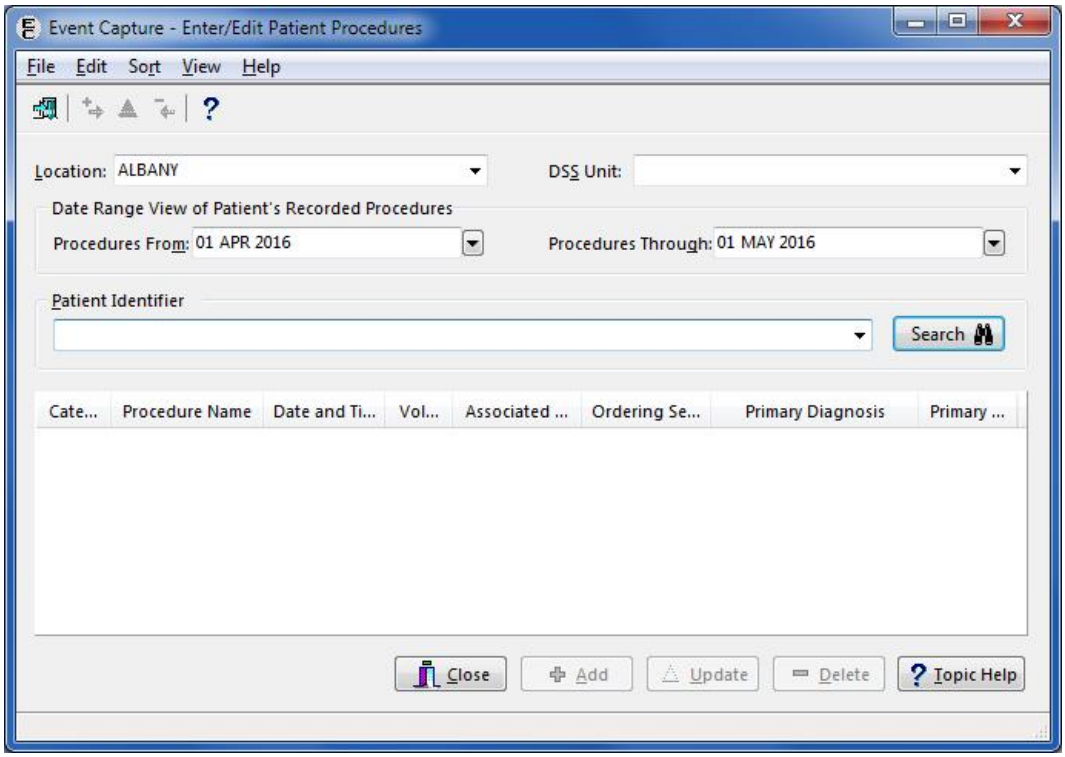
Before the User Starts

- Event Code Screens must be defined before entering any Event Capture data.

What the User Will See

- After selecting the Data Entry by Patient option, the Enter/Edit Patient Procedures screen will display (Figure 27), allowing the user to search by the Location, DSS Unit, Procedure Date Range, and Patient Identifier.
- After entering the desired selection criteria, any existing procedures for the selected patient will appear (Figure 29).

Figure 27: Enter/Edit Patient Procedures Screen



4.1.1.1 Enter/Edit Patient Procedures Screen

To use the Enter/Edit Patient Procedures screen:

Step 1. Select a Location.

- If there is only one Location set up in ECS, the Location on the screen will default to that value.
- If there is more than one Location set up in ECS, the Location on the screen will default to the last Location used. To change the Location, choose a Location from the dropdown list.

Step 2. Select a DSS Unit.

- If only one DSS Unit is assigned to the user, it will be the default selection. If more than one DSS Unit is assigned to the user, choose a DSS Unit from the dropdown list of accessible DSS Units.
- The user can add, edit, or delete any patient procedure for the selected DSS Unit.

  Note:

  - Be aware that any DSS Unit can be affected. Users should use caution and only add, delete, or modify DSS Units that they manage.

- To gain access to a DSS Unit, go the Management Menu and choose the DSS Unit — Add or Update DSS Units function to add the unit to the dropdown list. The ECMGR key is required.

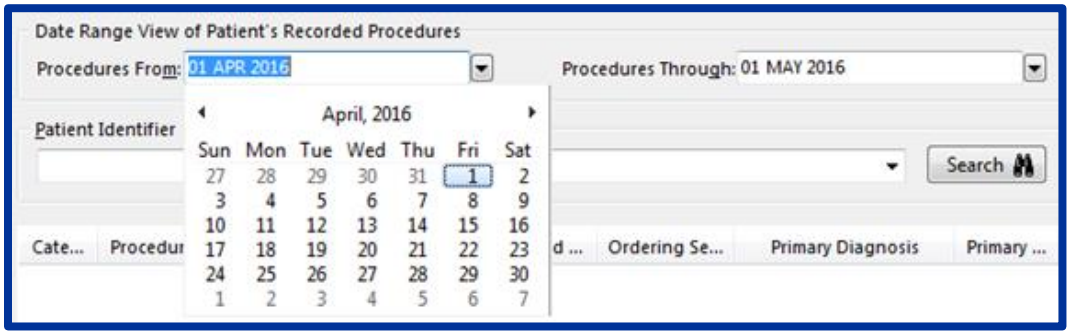
Step 3. Select a Date Range.

- The Procedure Date Range (from/through) will default to the system date. These fields may be edited by typing in a date (DD MMM YYYY) or by using the calendar dropdown (Figure 28).

  Note:

  - Date validation will prevent selecting a date in the future or displaying a Procedure From date later than the Procedures Through date.

Figure 28: Calendar Dropdown for Date Range View



Step 4. Use the Patient Identifier field to select a patient.

- Enter one of the following:

- Patient Name (whole or partial, last name first)
- Social Security Number (SSN)
- Last four digits of the Patient Social Security Number
- First character of Last Name plus the last four digits of the SSN with no spaces

- Press <**Enter**> on the keyboard or click the **Search** button.
- Choose from the list of patients displayed.

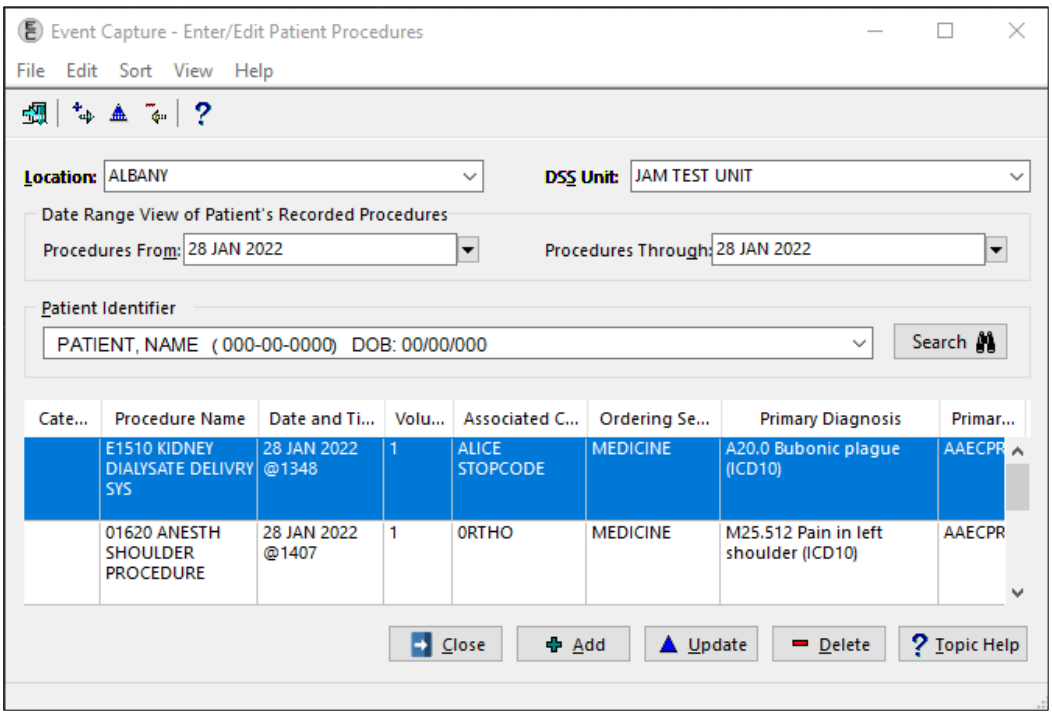
Step 5. View the Patient Procedures.

- Once the previous steps are complete, the bottom section of the window will display the patient procedures in chronological order for the selected search criteria (Figure 29). Each record will display the Category, Procedure, Date/Time, Volume, Associated Clinic, Ordering Section, Primary Diagnosis, and Primary Provider.

Note:

- Click the column header to sort the data in a different order.
- The **Close**, **Add**, and **Topic Help** buttons are always enabled. If patient procedures exist, the **Update** and **Delete** buttons will also be enabled.
- Click to highlight a patient procedure to select that row for updating or deleting.

Figure 29: Procedure History for Sample Patient



Step 6. To modify patient procedures, choose from the following button options:

- **Add** — Click the button to enter a new patient procedure.
- **Update** — Click the button to edit the selected patient procedure.
- **Delete** — Click the button to delete the selected patient procedure.

4.1.1.2 Recent Visits Screen

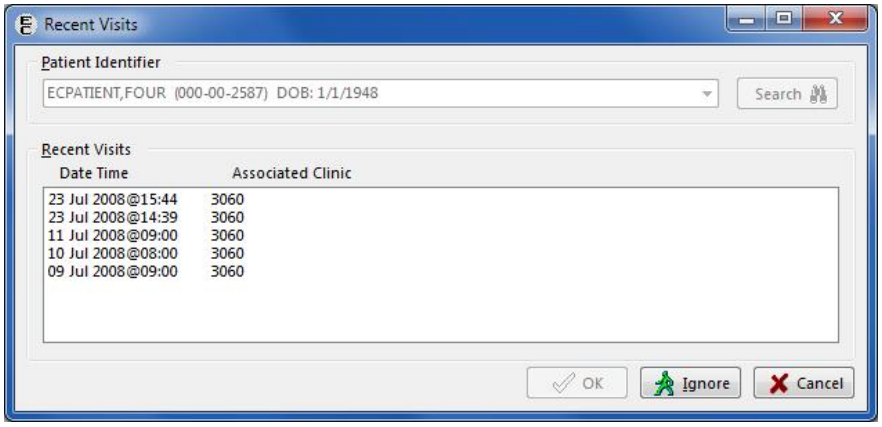
To see the Recent Visits screen (Figure 30):

Step 1. On the Enter/Edit Patient Procedures screen, click the Add button to enter a new patient procedure.

Note:

- If the selected DSS Unit is set to send to PCE and recent visits exist, the Recent Visits screen will be displayed after clicking the **Add** button.

Figure 30: Recent Visits Screen



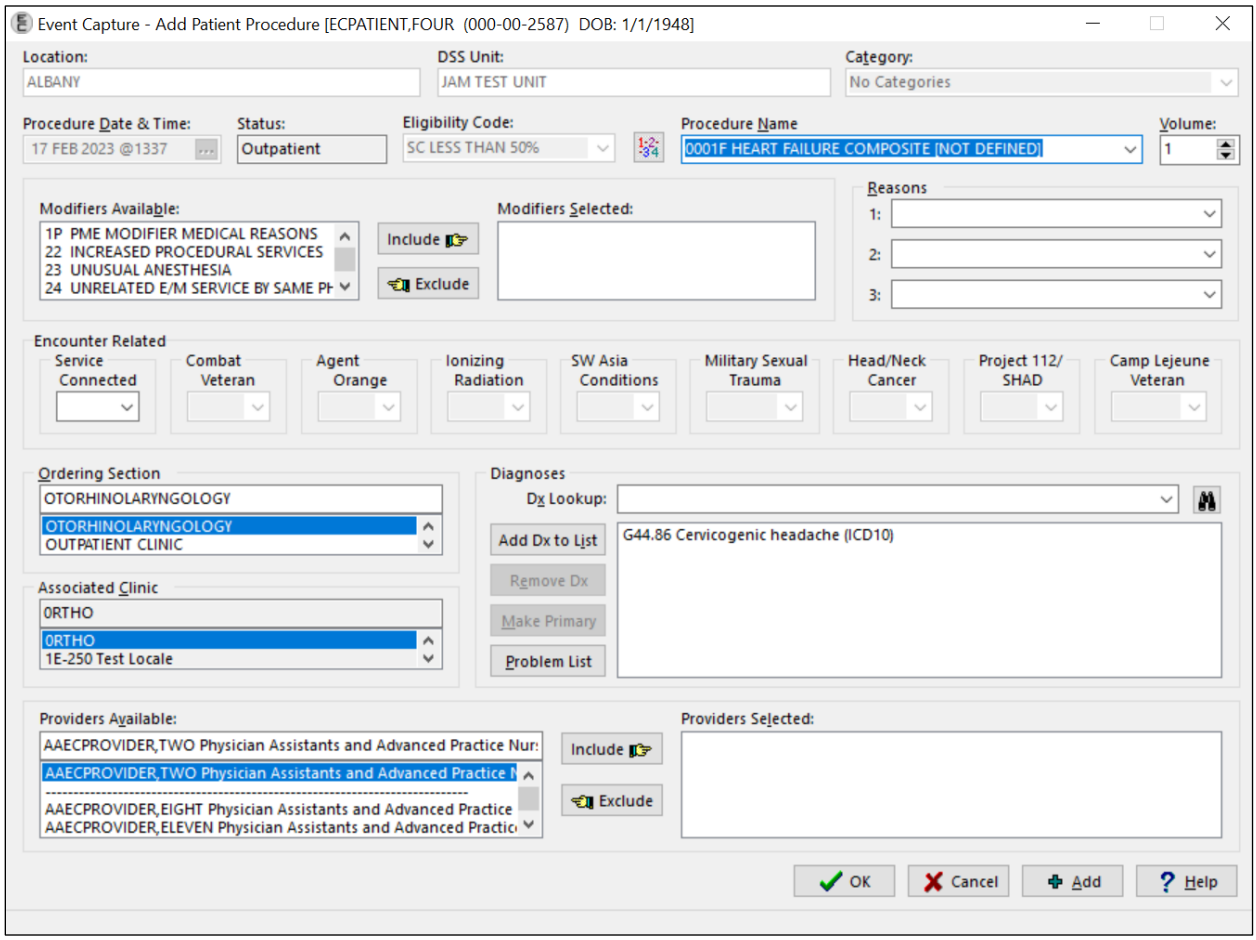
Step 2. Selection options on the Recent Visits screen.

One can select current day encounters from the Recent Visits, even if they occur after the current time. However, appointments and encounters that occur after the end of the current day will not be available for selection.

- On the Recent Visits screen, the user can choose one of three options:
  1. **OK:** Select the appropriate Appointment/Encounter from the Recent Visits. Click the **OK** button to close the screen. The Add Patient Procedure screen opens with the Procedure Date/Time and Associated Clinic fields pre-populated and not modifiable, based on the Appointment/Encounter selected on the Recent Visits screen (Figure 31). The Diagnosis field will also pre-populate, but information in this field *can* be modified by the user.

     Enter the procedure(s), answer classification questions as they pertain to that visit, and provider, and other pertinent fields if required (reasons, ordering section, and/or modifiers).
  2. **Ignore:** Click the **Ignore** button on the Recent Visits screen to go to the Add Patient Procedure screen to enter information for all fields.
  3. **Cancel:** Click the **Cancel** button to close the Recent Visits screen and return to the Enter/Edit Patient Procedures screen.

Figure 31: Add Patient Procedure Detail Screen



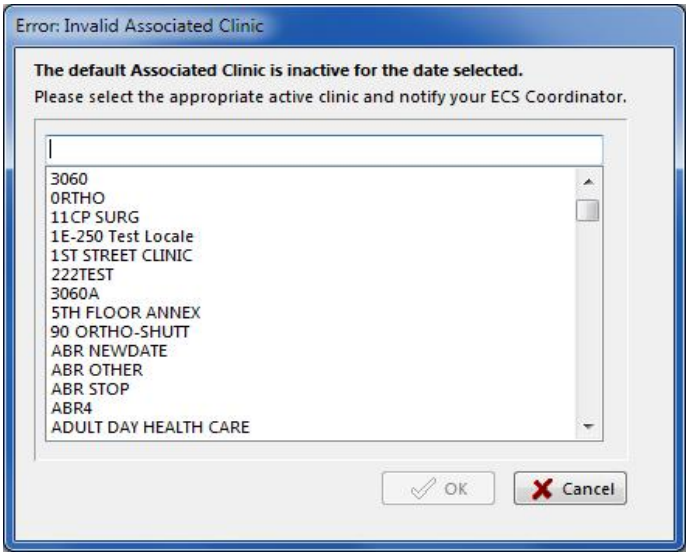
- To update the record, select an active clinic from the list and then click the **OK** button.

  Note:

  - If the Associated Clinic for the selected record is no longer active, clicking the **OK** button will result in the display of the Error: Invalid Associated Clinic message dialog (Figure 32). The message dialog lists only active Associated Clinics.
  - A clinic must exist in the CLINICS AND STOP CODES file (#728.44) prior to being available for selection in any Data Entry options.
  - If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.

- Click the **Cancel** button to open the record and the Associated Clinic field will be blank.

Figure 32: Error: Invalid Associated Clinic Message Dialog



4.1.1.3 Enter Information on the Add Patient Procedure or Edit Patient Procedure Screen

The user can add or edit patient procedures performed on an individual patient using the Add Patient Procedure screen, or the Edit Patient Procedure screen.

The following instructions and example assume that a user is entering a new procedure for a specified patient, and that the specified DSS Unit transmits data to PCE.

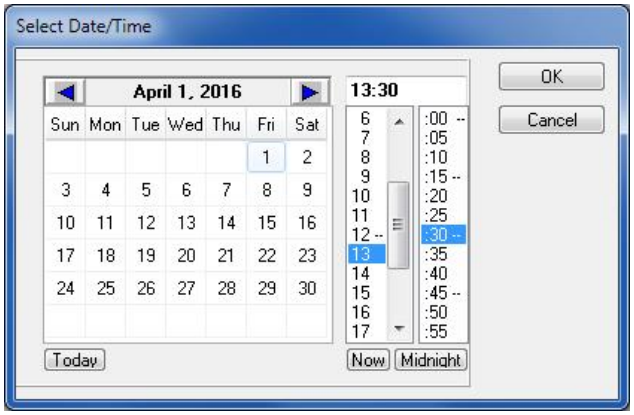
Step 1. Select a Category.

- If the Allow Category Use field in the DSS Unit Management setup is set to NO, then the Category field will be blank and disabled.
- If the Category field is defined for the specified DSS Unit, that Category will be the default value.

Step 2. Select the Procedure Date and Time.

- The Procedure Date and Time field is not editable if a recent visit was selected on the Recent Visits screen.
- Typing <**N**> on the keyboard and then pressing <**Enter**> (instead of clicking the button) will populate the Procedure Date & Time field with the current date and time, and will bypass the Select Date/Time dialog box (Figure 33).
- Clicking the **Now** button in the dialog box will enter the current system date and time.
- Clicking the **Midnight** button will display "23:59" as the time on the selected date.
- Until a valid date and time are selected, fields after the Procedure Date and Time field are not visible. Once a valid date and time are selected, the remaining fields become visible and available for input.

Figure 33: Select Date/Time Dialog Box



Step 3. Select an Eligibility Code for this procedure.

- If the selected patient has only one Eligibility Code, that value defaults. Otherwise, select the Eligibility Code that applies to this procedure.
- The primary Eligibility Code displays as the default.

Step 4. Select a Procedure Name.

- Select a Procedure from the dropdown list.

Step 5. Enter the Volume for the procedure.

Step 6. If applicable, the CPT Modifiers section will be enabled.

- Modifiers provide additional information about a CPT procedure. With functionality put in place by the Code Set Versioning project, only CPT modifiers that are active for the date and time of the event will show.
- Choose a modifier from the Modifiers Available list and click Include.
- Repeat as needed.
- To remove a modifier, choose it from the Modifiers Selected list and click Exclude.
- Press and hold the <**Ctrl**> key, and then click items to select multiple modifiers at one time.

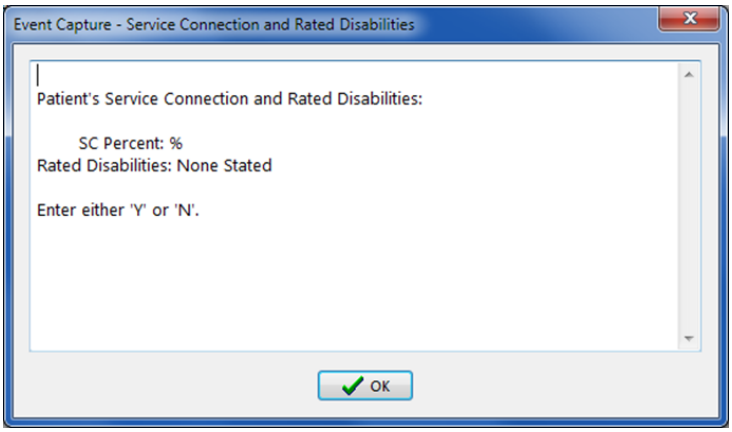
Step 7. If applicable, the Reasons field will be enabled.

- The user can enter up to three reasons.
- Reason #1 must be entered before a second or third may be entered. Reason #2 must be entered before a third may be entered.
- Reasons appear alphabetically in the dropdown.
- Once selected, a reason will not appear in the dropdown list for remaining reason fields.
- A reason can be selected by entering the initial letter(s) into the Reasons field. If the reason that appears is not the correct choice, click the down arrow on the reason dropdown to select another reason, or enter different letter(s).

Step 8. If applicable, the mandatory classification questions section will be enabled.

- Select **YES** only if the treatment received relates to that classification.
- Press the <**F1**> key while in the Service Connected field to display a message dialog containing the patient's service connection and any rated disabilities (Figure 34).

Figure 34: Service Connection and Rated Disabilities Screen



Step 9. Select the Ordering Section.

Step 10. Select the Associated Clinic (if not already populated from the Recent Visits screen).

Note

- A clinic must exist in file #728.44 Clinics and Stop Codes prior to being available for selection in any Data Entry options.
- If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.

Step 11. Select the associated diagnosis code for the procedure (Figure 35).

Note

- If a recent visit is selected from the Recent Visits screen, the diagnoses box may be pre-populated; diagnoses can be added and removed by the user, as desired.

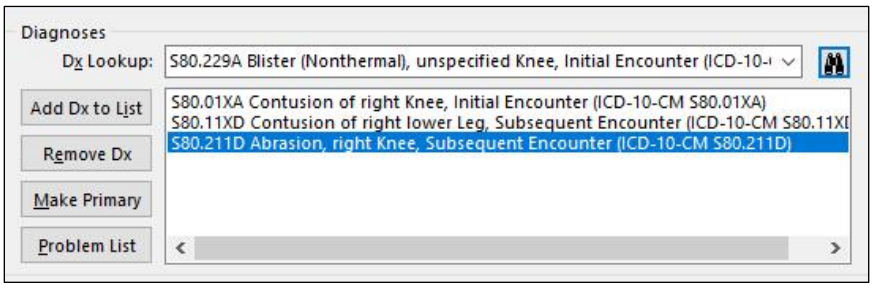
- Search for a diagnosis by entering one of the following in the Dx (Diagnosis) Lookup box:
  - International Classification of Diseases (ICD) code (whole or partial)
  - Diagnosis Name (whole or partial)
- Click the **Binoculars** (Search) button to the right of the Dx Lookup box or press <**Enter**> to begin the search.
- Select from the resulting dropdown list and click the **Add Dx to List** button to place the desired diagnosis in the Diagnoses box. The user can also double-click on a diagnosis to add it to the list.

Note

- If an ICD code is used to search for a diagnosis, the user can press < **Enter** > to place the diagnosis in the Diagnoses box.

- Repeat as needed to select and add multiple diagnoses.
- Existing diagnoses for the patient procedures, as shown in the Diagnoses box, may be removed, and the Primary Diagnosis may be changed by selecting a diagnosis and using the associated buttons to the left of the Diagnoses box. **The primary diagnosis will always be the first entry in the diagnosis box.**

Figure 35: Data Entry Diagnoses Box



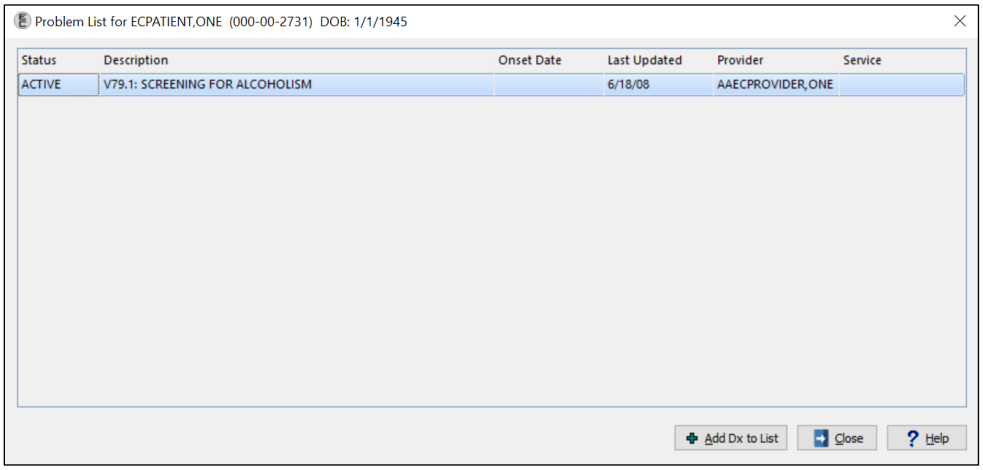
Step 12. Optional: Click the Problem List button (Figure 35) to open a list of problems for a patient with the following details (Figure 36):

- Status
- ICD Code with Description
- Onset Date
- Last Updated
- Provider
- Service

- The user may add a diagnosis to the list by double-clicking an item from the Problem List or by selecting an item from the Problem List and clicking the **Add Dx to List** button. Items with inactive ICD codes cannot be added to the diagnoses box and will return an error message if selected.

- If no information exists for the **Problem List**, a message dialog is displayed stating "There are no items in the problem list for NAME, PATIENT (XXX-XX-XXXX) DOB: m/d/yyyy."

Figure 36: Problem List



Step 13. Select the providers of the service. Use the Providers Available combo box to enter the following:

- Provider name (full or partial, last name first).
- Select the provider from the resulting dropdown list and click the **Include** button.
- To remove a provider, select from the Providers Selected list and click the **Exclude** button.

Step 14. Click the Add button to file the current procedure and clear the fields, allowing for input of additional procedures for the selected patient.

Step 15. Click the OK button to file the current procedure and return to the Enter/Edit Patient Procedures screen.

Step 16. Click the Cancel button to return to the Enter/Edit Patient Procedures screen without filing the procedure.

Note:

- If the record transmits to PCE based on the DSS Unit on Management Menu set up, then all fields will be required.
- If the record does not transmit to PCE based on the DSS Unit on Management Menu set up, then the Associated Clinic and Diagnosis fields will be disabled.
- Occasion Of Service records will not require answers to Classification questions and will not require any diagnosis values.
- Press the <**F1**> key while in any field to display information pertaining to that field.

4.1.1.4 Add a Patient Procedure

The following instructions and example assume that a user is entering a patient procedure for a specified patient and that the specified DSS Unit transmits data to PCE. To add multiple procedures for a patient, see section 4.1.1.5 Add Multiple Patient Procedures.

Step 1. On the Event Capture Main Menu, select Data Entry.

Step 2. On the Data Entry Menu, select Data Entry by Patient.

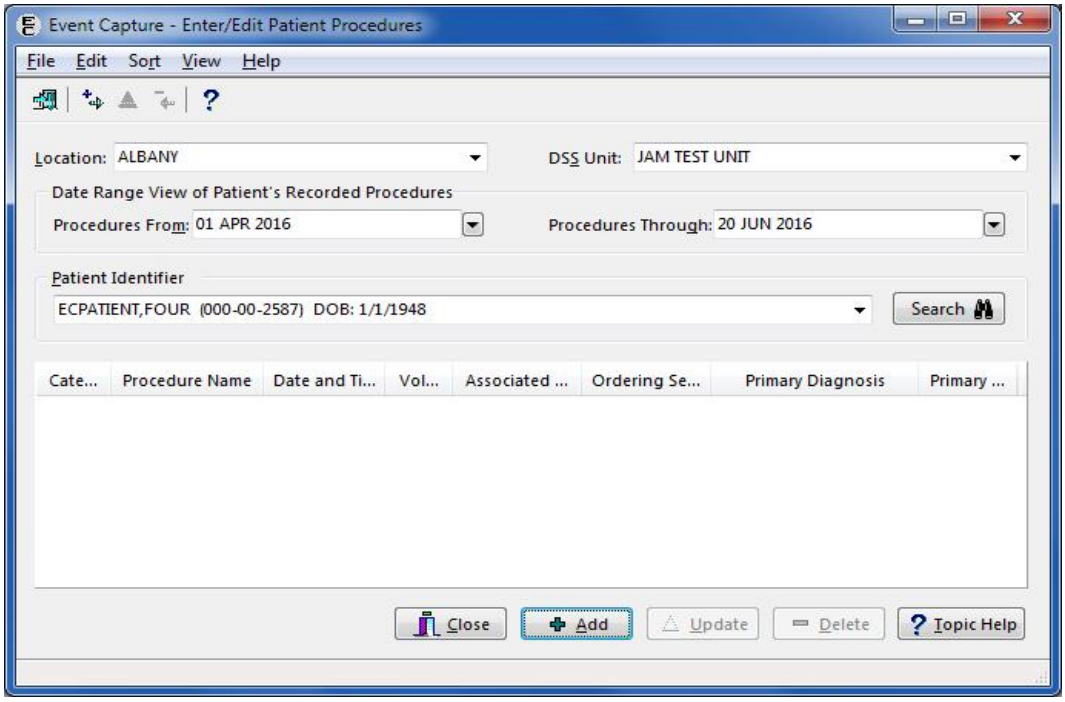
- The Enter/Edit Patient Procedures screen appears (Figure 37).

Step 3. Select the Location and DSS Unit.

Step 4. Allow the Procedure Date Range to default to today.

Step 5. Select a Patient.

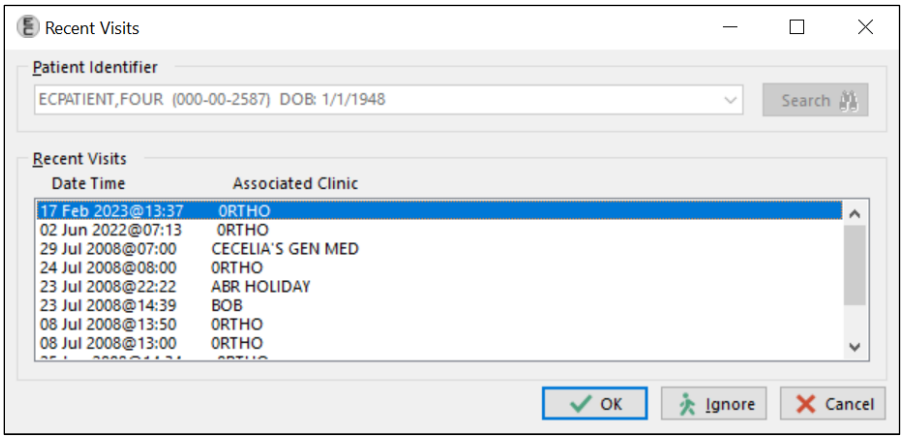
Figure 37: Enter/Edit Patient Procedures Screen



Step 6. Click Add.

Step 7. If the DSS Unit is set to send to PCE, the Recent Visits screen will appear (Figure 38). Select a scheduled appointment and click OK.

Figure 38: Recent Visits Screen



Step 8. Complete the procedure-related fields on the Add Patient Procedure screen (Figure 39) according to the field-by-field instructions given in Section 4.1.1.3 — Add Information to the Add Patient Procedure or Edit Patient Procedure Screen

Figure 39: Add Patient Procedure Screen

Event Capture - Add Patient Procedure [ECPATIENT,FOUR (000-00-2587) DOB: 1/1/1948]

Location: ALBANY
DSS Unit: JAM TEST UNIT
Category: No Categories
Procedure Date & Time: 17 FEB 2023 @1337
Status: Outpatient
Eligibility Code: SC LESS THAN 50%
Procedure Name: 0001F HEART FAILURE COMPOSITE [NOT DEFINED]
Volume: 1

Modifiers Available:
1P PME MODIFIER MEDICAL REASONS
22 INCREASED PROCEDURAL SERVICES
23 UNUSUAL ANESTHESIA
24 UNRELATED E/M SERVICE BY SAME PH
Include
Exclude
Modifiers Selected:

Reasons
1:
2:
3:

Encounter Related
Service Connected | Combat Veteran | Agent Orange | Ionizing Radiation | SW Asia Conditions | Military Sexual Trauma | Head/Neck Cancer | Project 112/ SHAD | Camp Lejeune Veteran

Ordering Section
OTORHINOLARYNGOLOGY
OTORHINOLARYNGOLOGY
OUTPATIENT CLINIC

Associated Clinic
ORTHO
ORTHO
1E-250 Test Locale

Diagnoses
Dx Lookup:
Add Dx to List
Remove Dx
Make Primary
Problem List
G44.86 Cervicogenic headache (ICD10)

Providers Available:
AAECPROVIDER,TWO Physician Assistants and Advanced Practice Nur
AAECPROVIDER,TWO Physician Assistants and Advanced Practice N
AAECPROVIDER,EIGHT Physician Assistants and Advanced Practice
AAECPROVIDER,ELEVEN Physician Assistants and Advanced Practic
Include
Exclude
Providers Selected:

OK | Cancel | Add | Help

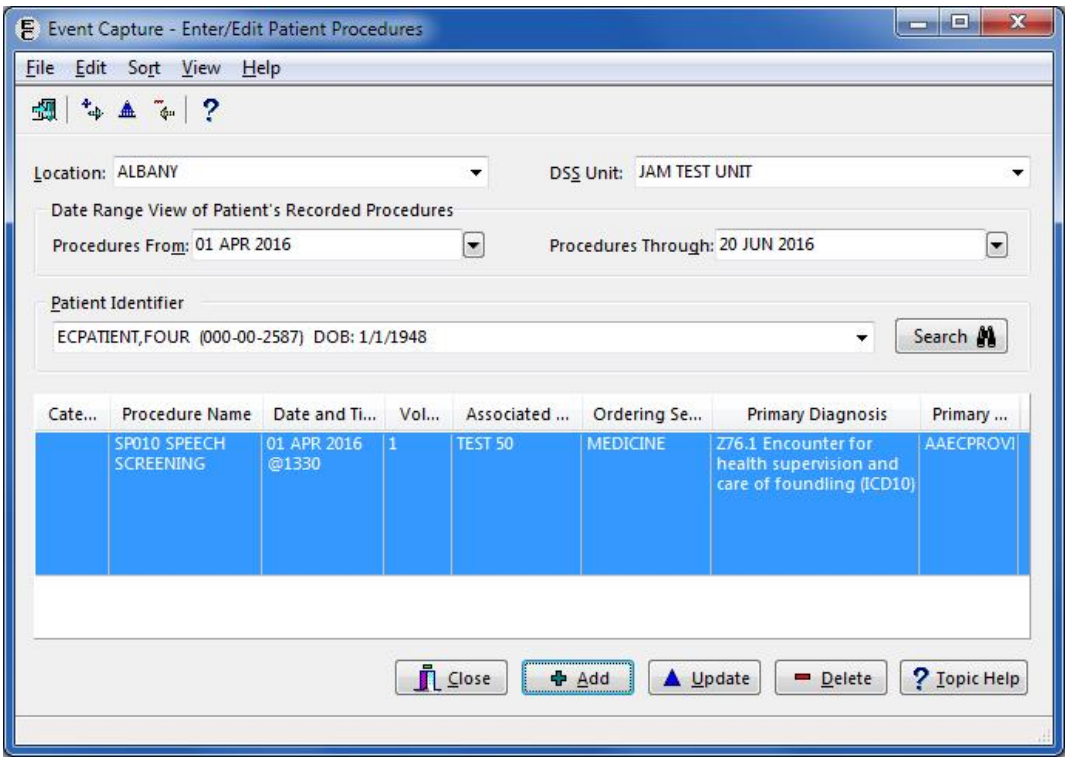
Step 9. Click Add to file the record and clear the fields, allowing for input of another procedure for this patient. Users may also opt to use the Multiple Procedures feature to input multiple patient procedures at one time.

Step 10. Click the OK button to save the record and return to the Enter/Edit Patient Procedures screen.

Step 11. The Enter/Edit Patient Procedures screen displays any existing procedures for this patient (Figure 40).

Step 12. Click the Close button to return to the Data Entry menu.

Figure 40: Enter/Edit Patient Procedures with New Procedure Added



4.1.1.5 Add Multiple Patient Procedures

The following instructions and example assume that a user is entering multiple procedures for a specified patient and that the specified DSS Unit transmits data to PCE.

Step 1. On the Event Capture Main Menu, select Data Entry.

Step 2. On the Data Entry Menu, select Data Entry by Patient.

- The Enter/Edit Patient Procedures screen appears (Figure 41).

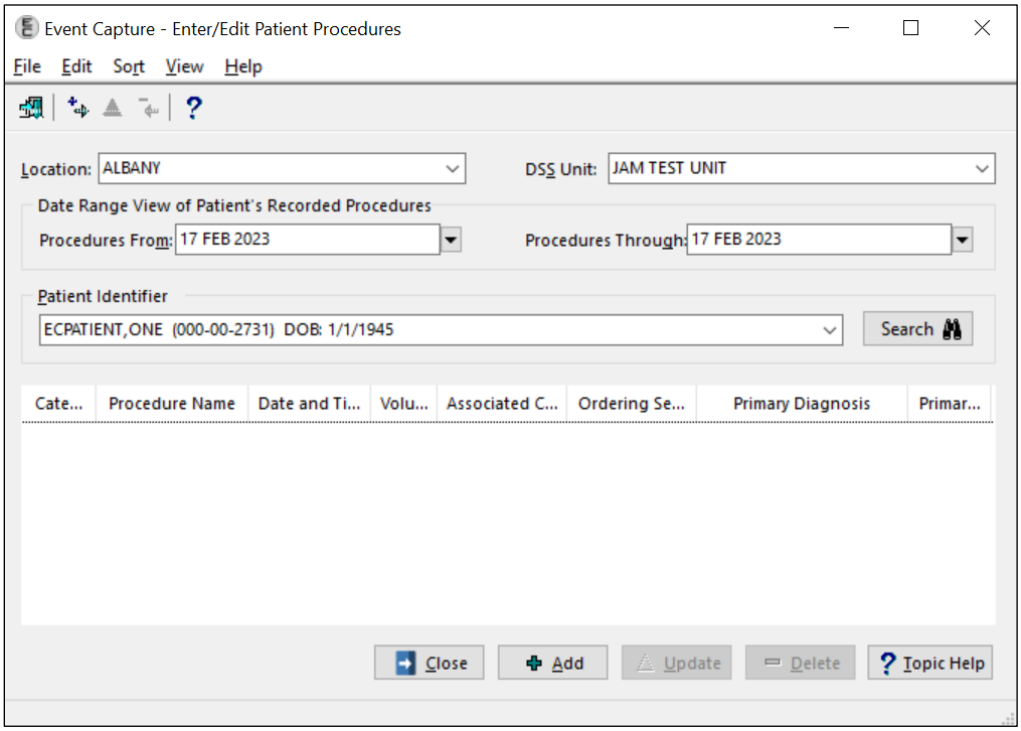
Step 3. Select the Location and DSS Unit.

Step 4. Allow the Procedure Date Range to default to today.

Step 5. Select a Patient.

Step 6. Click Add.

Figure 41: Enter/Edit Patient Procedures Screen



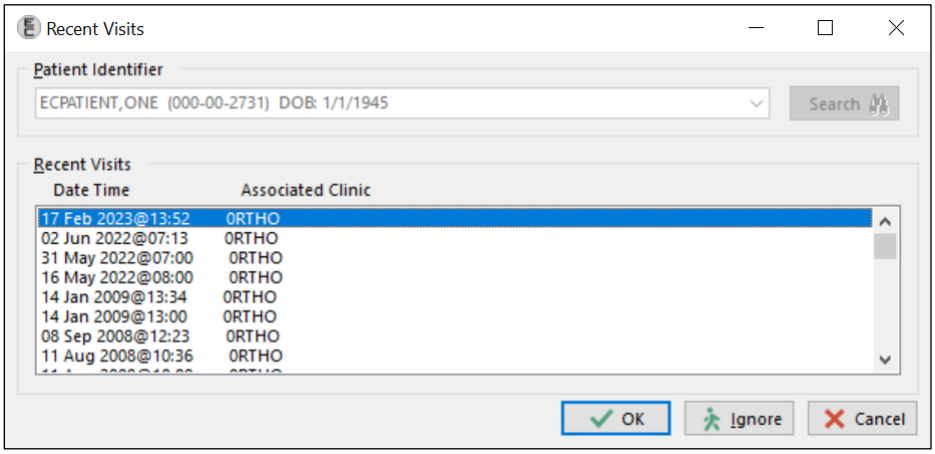
Step 7. If the DSS Unit is set to send to PCE, the Recent Visits screen will appear (Figure 38).

The user can bypass this screen and go directly to the Add Patient Procedure screen by clicking the Ignore button.

The user can select a visit from the list and click the OK button to partially populate the Add Patient Procedure screen (Figure 46) with the following:

- Date/Time
- Associated Clinic
- Diagnoses

Figure 42: Recent Visits screen



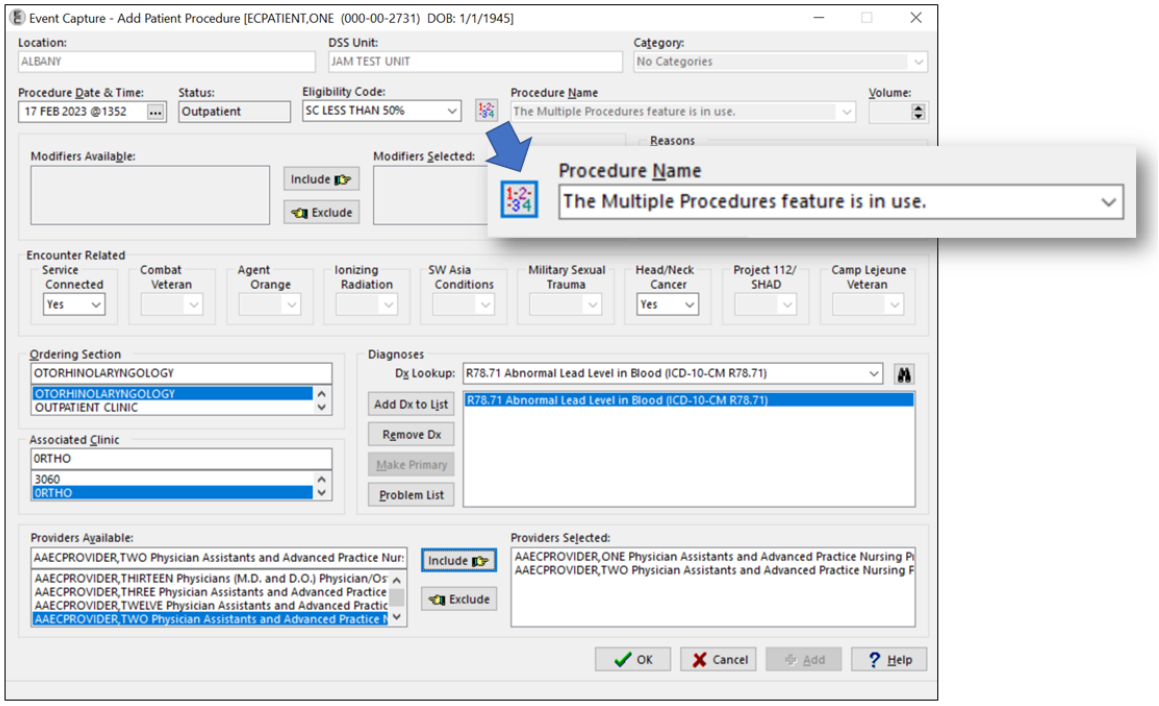
Step 8. Once the Add Patient Procedures screen is open, select the square button to the left of the Procedure Name field to enter multiple procedures (Figure 43).

When selected, the field will display "The Multiple Procedures feature is in use."

Note:

- The Add button for this screen will be disabled when the Multiple Procedures feature is used.

Figure 43: Multiple Procedures Button



Step 9. The Enter Multiple Procedures for an Encounter screen opens (Figure 44).

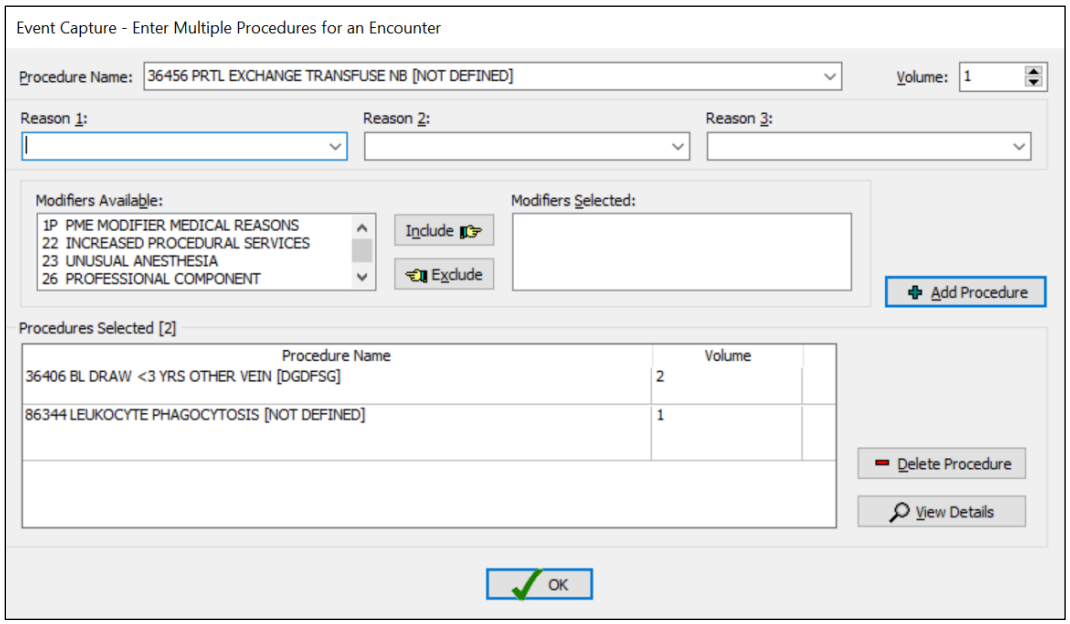
Step 10. Input data into the available fields. Refer to section 4.1.1.3 for more detailed field instructions:

- Procedure Name — Select a Procedure from the dropdown list.
- Volume — Enter the Volume for the procedure.
- Reasons — The user can enter up to three reasons, which appear alphabetically in the dropdown menus.
- Modifiers Selected — Choose a modifier from the Modifiers Available list and click the **Include** button. To remove a modifier, choose it from the Modifiers Selected list and click the **Exclude** button. To select multiple modifiers at one time, press and hold the <**Ctrl**> key, and then click the appropriate button to include or exclude items.

Step 11. Select the Add Procedure button to place information in the Procedures Selected box.

Step 12. Repeat steps 10 and 11 to add procedures to the list, as desired. The number of procedures added by the user is shown in brackets beside the Procedures Selected label.

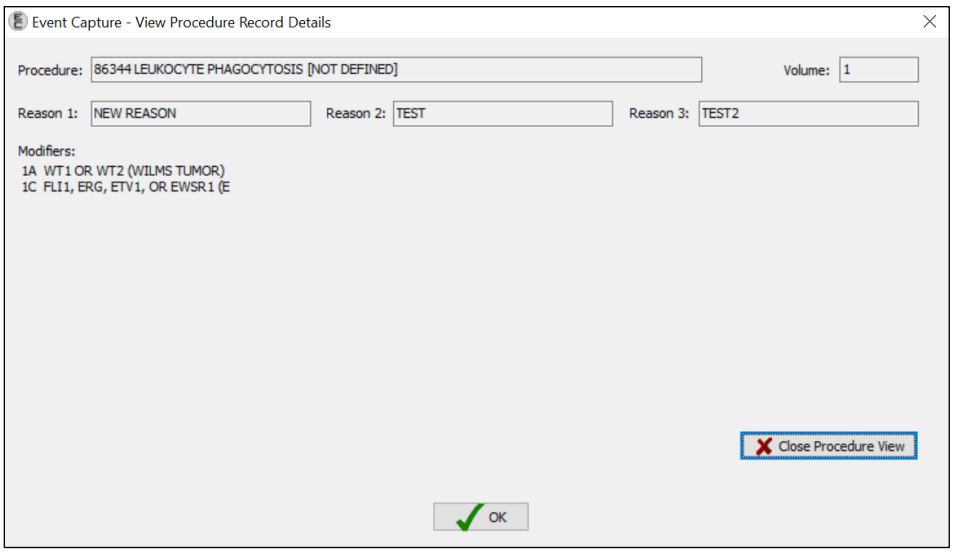
Figure 44: Enter Multiple Procedures for an Encounter screen



Step 13. Optional: A procedure can be removed by selecting it from the list and clicking the Delete Procedure button.

Step 14. Optional: Details of individual procedures can be viewed by selecting a procedure from the list and clicking on the View Details button. The View Procedure Record Details screen opens (Figure 45). Select the Close Procedure View button to return to the previous screen or select OK to return to the Add Patient Procedure Screen (Figure 46).

Figure 45: View Procedure Record Details



Step 15. Click the OK button to return to the Add Patient Procedure screen when finished (Figure 46).

Figure 46: Add Patient Procedure Screen

Event Capture - Add Patient Procedure [ECPATIENT,ONE (000-00-2731) DOB: 1/1/1945]

Location: ALBANY
DSS Unit: JAM TEST UNIT
Category: No Categories
Procedure Date & Time: 17 FEB 2023 @1352
Status: Outpatient
Eligibility Code: SC LESS THAN 50%
Procedure Name: The Multiple Procedures feature is in use.
Volume:
Modifiers Available:
Include
Exclude
Modifiers Selected:
Reasons
1:
2:
3:
Encounter Related
Service Connected: Yes
Combat Veteran
Agent Orange
Ionizing Radiation
SW Asia Conditions
Military Sexual Trauma
Head/Neck Cancer: Yes
Project 112/ SHAD
Camp Lejeune Veteran
Ordering Section
OTORHINOLARYNGOLOGY
OTORHINOLARYNGOLOGY
OUTPATIENT CLINIC
Associated Clinic
ORTHO
3060
ORTHO
Diagnoses
Dx Lookup: R78.71 Abnormal Lead Level in Blood (ICD-10-CM R78.71)
Add Dx to List
Remove Dx
Make Primary
Problem List
R78.71 Abnormal Lead Level in Blood (ICD-10-CM R78.71)
Providers Available:
AAECPROVIDER,TWO Physician Assistants and Advanced Practice Nur
AAECPROVIDER,THIRTEEN Physicians (M.D. and D.O.) Physician/Os
AAECPROVIDER,THREE Physician Assistants and Advanced Practice
AAECPROVIDER,TWELVE Physician Assistants and Advanced Practic
AAECPROVIDER,TWO Physician Assistants and Advanced Practice N
Include
Exclude
Providers Selected:
AAECPROVIDER,ONE Physician Assistants and Advanced Practice Nursing Pr
AAECPROVIDER,TWO Physician Assistants and Advanced Practice Nursing P
OK
Cancel
Add
Help

Step 16. Complete the active fields on the Add Patient Procedure detail screen. Refer to section 4.1.1.3 for more detailed field instructions:

- Procedure Date & Time — Select a valid date and time (if not already populated by the Recent Visits screen).
- Encounter Related — Select YES only if the treatment received relates to that classification.
- Ordering Section — Select the Ordering Section.
- Associated Clinic — Select the Associated Clinic (if not already populated from the Recent Visits screen).
- Diagnoses — Select the diagnosis code(s) associated with the procedure; if populated from the Recent Visits screen, diagnoses can be edited.
- Providers Available — Select the provider(s) of the service.

Note:

- If a recent visit was selected from the Recent Visits screen, the Procedure Date & Time and Associated Clinic will be pre-populated and are not editable. The Diagnoses field will also be pre-populated but *is* editable by the user.

Step 17. Click the OK button to save the record and return to the Enter/Edit Patient Procedures screen.

Step 18. The Enter/Edit Patient Procedures screen displays any existing procedures for this patient (Figure 40).

Step 19. Click the Close button to return to the Data Entry menu.

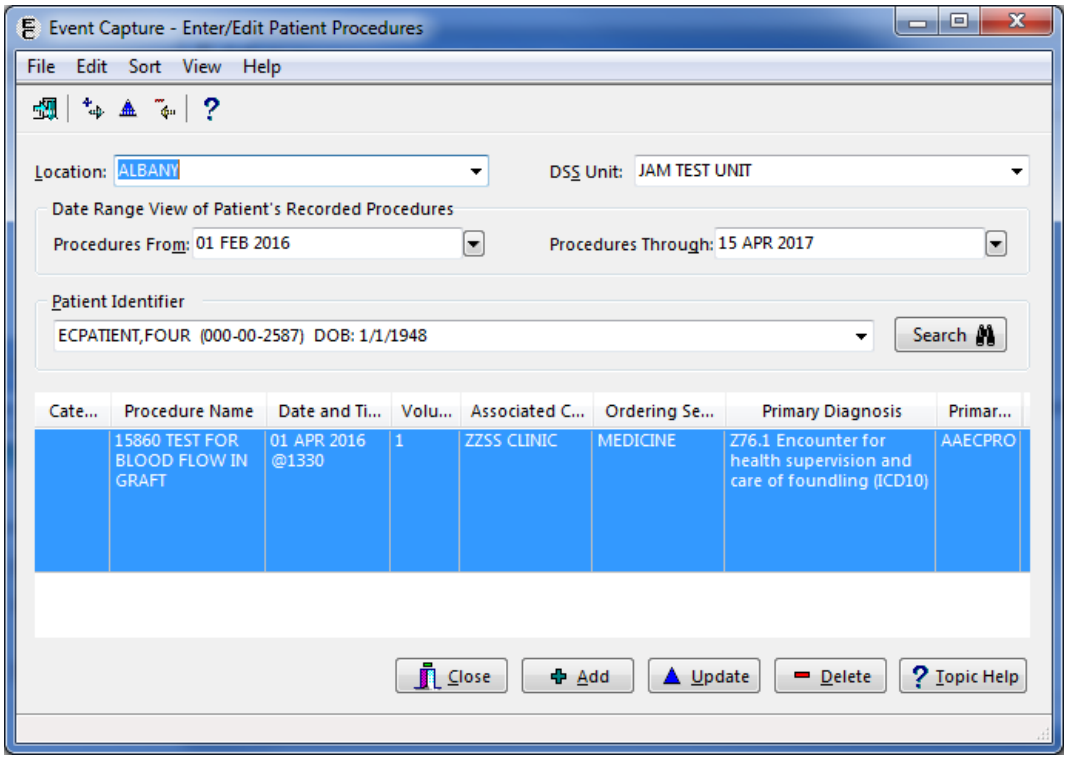
4.1.1.6 Edit a Patient Procedure

Step 1. On the Event Capture Main Menu, select Data Entry.

Step 2. On the Data Entry Menu, select Data Entry by Patient.

Step 3. The Enter/Edit Patient Procedures screen appears (Figure 47).

Figure 47: Enter/Edit Patient Procedures Screen



Step 4. Select the Location and DSS Unit.

Step 5. Enter a Procedure Date Range by using the calendar dropdowns.

- The date fields default to the current system date.

Step 6. Select a patient.

Step 7. The lower portion of the screen displays the procedure(s) for the selected patient and the DSS Unit within the date range.

Step 8. Select a procedure and click the Update button.

- The Edit Patient Procedure screen appears (Figure 48).

Figure 48: Edit Patient Procedure Screen

Event Capture - Edit Patient Procedure [ECPATIENT,ONE (000-00-2731) DOB: 1/1/1945]

Location: ALBANY
DSS Unit: JAM TEST UNIT
Category:
Procedure Date & Time: 15 MAR 2023 @1034
Status: Outpatient
Eligibility Code: SC LESS THAN 50%
Procedure Name: 0001F HEART FAILURE COMPOSITE [NOT DEFINED]
Volume: 1

Modifiers Available:
1P PME MODIFIER MEDICAL REASONS
22 INCREASED PROCEDURAL SERVICES
23 UNUSUAL ANESTHESIA
24 UNRELATED E/M SERVICE BY SAME PH
Include
Exclude
Modifiers Selected:
51 MULTIPLE PROCEDURES

Reasons
1: TEST
2:
3:

Encounter Related
Service Connected: Yes
Combat Veteran
Agent Orange
Ionizing Radiation
SW Asia Conditions
Military Sexual Trauma
Head/Neck Cancer: No
Project 112/ SHAD
Camp Lejeune Veteran

Ordering Section
OTORHINOLARYNGOLOGY
OTORHINOLARYNGOLOGY
OUTPATIENT CLINIC

Associated Clinic
ORTHO
ORTHO
1E-250 Test Locale

Diagnoses
Dx Lookup:
Add Dx to List
Remove Dx
Make Primary
Problem List
R51.9 Headache, unspecified (ICD10)
G44.011 Episodic cluster headache, intractable (ICD10)
G44.311 Acute post-traumatic headache, intractable (ICD10)
G44.301 Post-traumatic headache, unspecified, intractable (ICD10)

Providers Available:
AAECPROVIDER,EIGHT Physician Assistants and Advanced Practice
AAECPROVIDER,ELEVEN Physician Assistants and Advanced Practic
AAECPROVIDER,FIVE Physician Assistants and Advanced Practice N
AAECPROVIDER,FOUR Physician Assistants and Advanced Practice
Include
Exclude
Providers Selected:
AAECPROVIDER,EIGHT

OK
Cancel
Add
Help

Step 9. Complete the procedure-related fields on the Edit Patient Procedure detail screen according to the field-by-field instructions given in Section 4.1.1.3.

Step 10. Click the Add button to file the record and clear the fields, allowing for input of another procedure for this patient.

Step 11. Click the OK button to save the record and return to the Enter/Edit Patient Procedures screen.

- The Enter/Edit Patient Procedures summary screen displays the procedure(s) (Figure 47) entered for this patient.

Step 12. Click the button to return to the Data Entry menu.

4.1.1.7 Delete a Patient Procedure

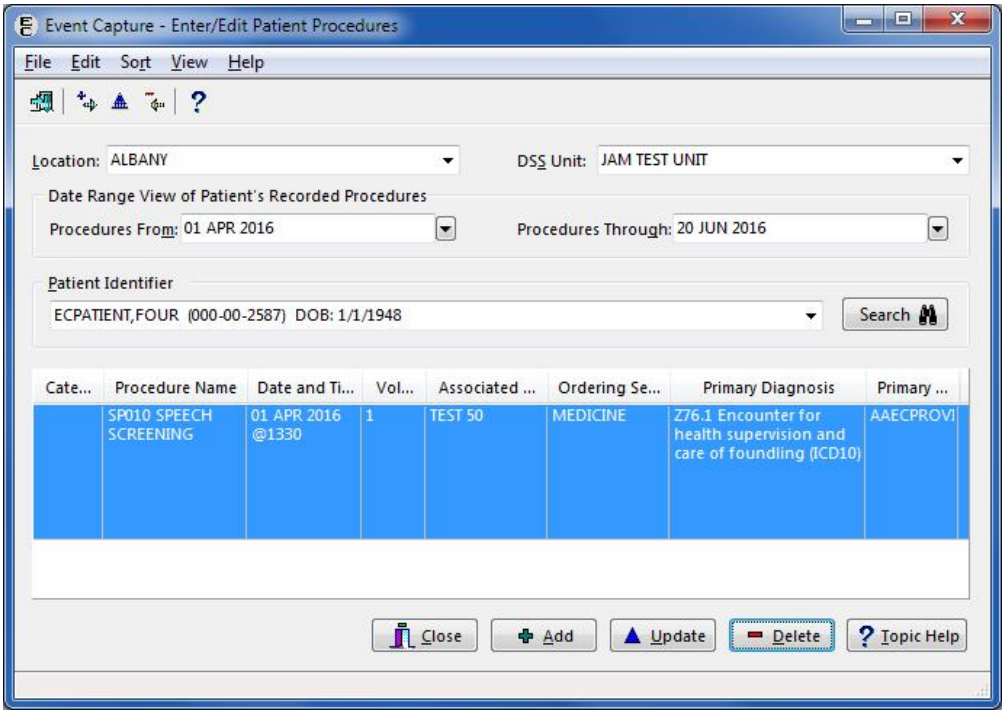
This section instructs the user on how to delete a Patient Procedure.

Step 1. On the Event Capture Main Menu, select Data Entry.

Step 2. On the Data Entry Menu, select Data Entry by Patient.

- The Enter/Edit Patient Procedures summary screen appears (Figure 49).

Figure 49: Enter/Edit Patient Procedures Screen



Step 3. Select the Location and DSS Unit.

Step 4. Enter a procedure date range by using the calendar dropdowns.

- The date fields default to the current system date.

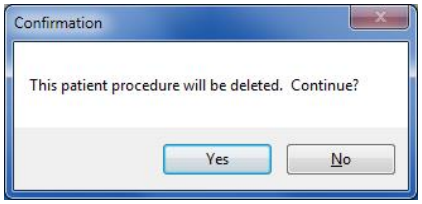
Step 5. Select a patient.

Step 6. The lower portion of the screen displays the procedure(s) for the selected location, DSS Unit and patient within the date range.

Step 7. Choose a procedure and click the Delete button.

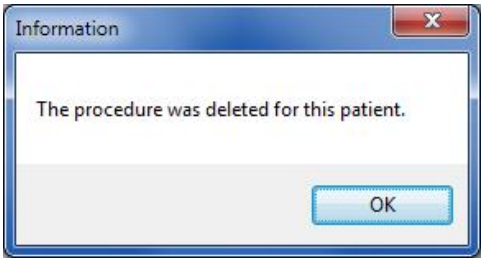
- A confirmation message appears (Figure 50).

Figure 50: Procedure Deleted Confirmation Dialog



- Click the **Yes** button on the confirmation message dialog, and an Information message dialog appears to show the selected procedure was deleted for the patient (Figure 51). Click the **OK** button to return to the Enter/Edit Patient Procedures screen.
- Click the **No** button on the confirmation message dialog to return to the Enter/Edit Patient Procedures screen without deleting the procedure.

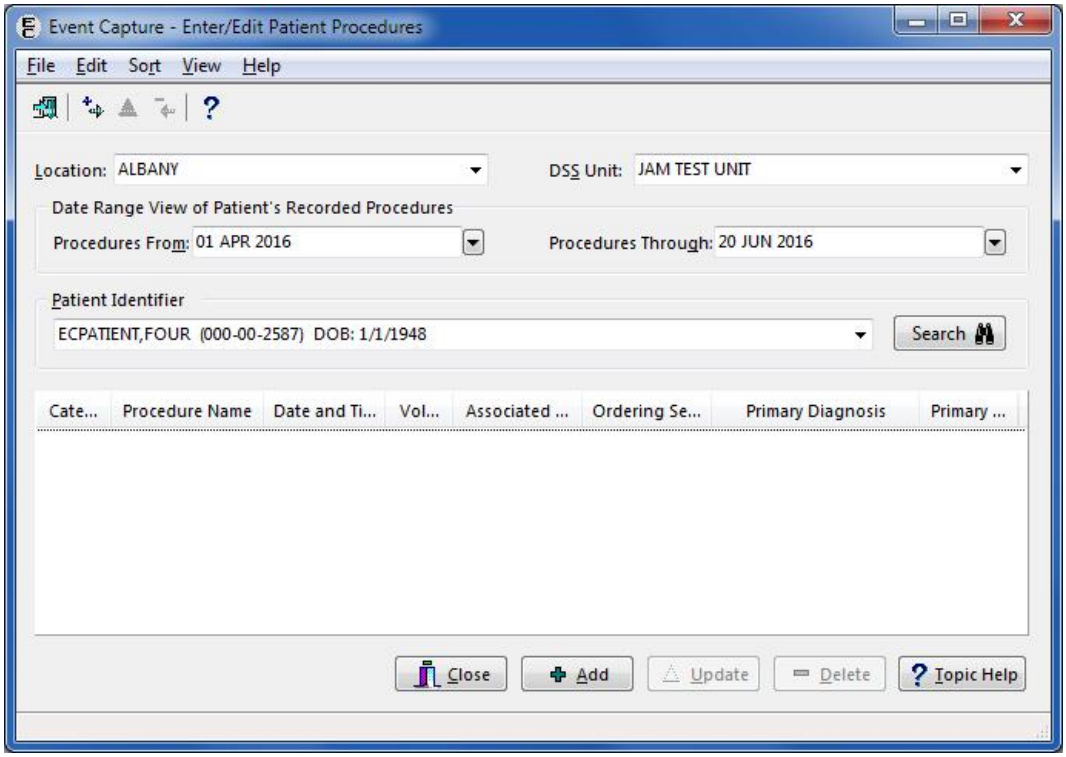
Figure 51: Information Message



- The screen will refresh to show the remaining procedures entered for this patient (Figure 52).

Step 8. Click the Close button to return to the Data Entry menu.

Figure 52: Enter/Edit Patient Procedures Screen with Procedure Deleted



4.1.2 Data Entry by Procedure

The Data Entry by Procedure option allows the user to enter or edit the same procedure for multiple patients.

Before the User Starts

- Event Code Screens must be defined before entering any Event Capture data.

What the User Will See

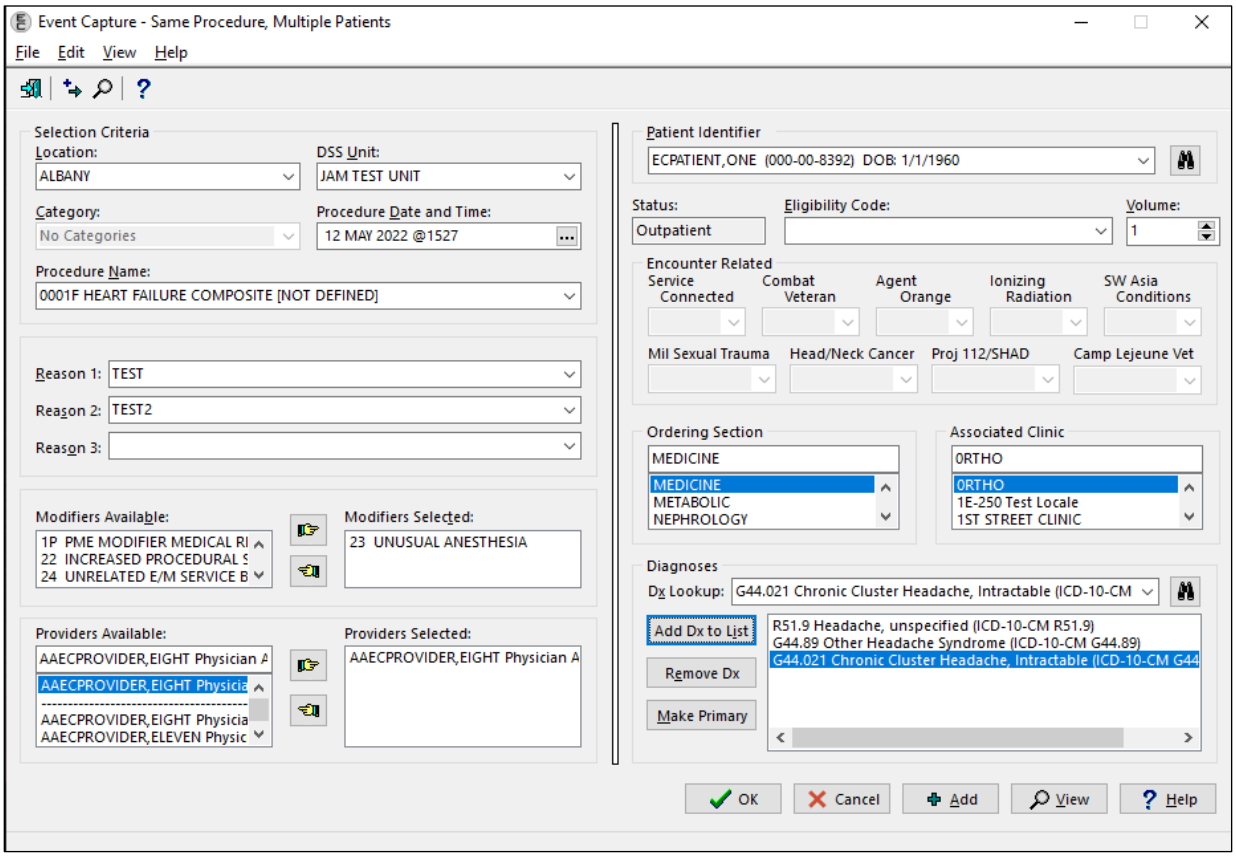
- After selecting Data Entry by Procedure, the Same Procedure, Multiple Patients screen will display (Figure 53).
- The left side of the screen contains information for the procedure that the system will use for all patients.

  Note:

  - The user will enter the procedure information only one time.

- The right side of the screen identifies each patient. The user will complete this section for each patient. Click the **Add** button to file the data and clear the fields to enter data for the next patient.
- The **View** button displays a listing of all patients entered for this procedure in this session.

Figure 53: Same Procedure, Multiple Patients Screen



4.1.2.1 Add a Procedure for Multiple Patients

The following instructions and example assume that the user wants the specified DSS Unit to send data to PCE.

Step 1. Select a Location.

- If there is only one Location set up for the Event Capture System, the Location on the screen will default to that value.
- If there is more than one Event Capture Location set up, the Location will default to the last Location used. To change the Location, choose a Location from the dropdown list of available Event Capture Locations.

Step 2. Select a DSS Unit.

- If one DSS Unit is defined in Event Capture, or if only one DSS Unit is assigned to the user, that DSS Unit will be the default value.
- If more than one DSS Unit is defined, a default will not be assigned. Choose a DSS Unit from the dropdown list of accessible DSS Units.
- To gain access to a DSS Unit, go to the Management Menu and choose the DSS Unit — Add or Update DSS Units function to add the unit to the dropdown list.

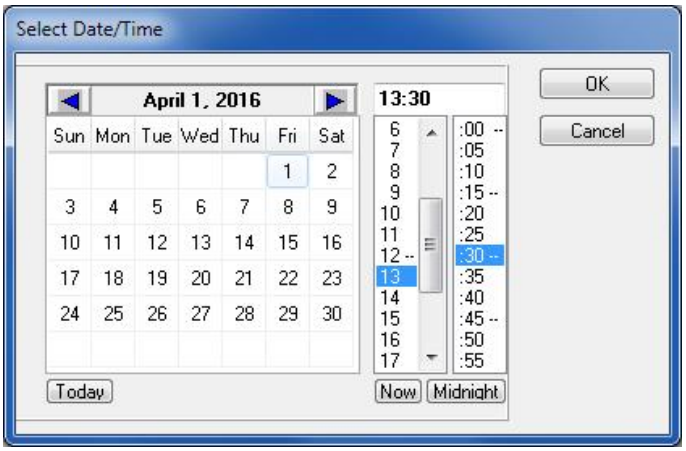
Step 3. Select a Category.

- If only one category is defined for the specified DSS Unit, that category will be the default.

Step 4. Select the Procedure Date and Time.

- Typing <**N**> and then pressing <**Enter**> in the field (instead of clicking the button) will bypass the Select Date/Time dialog (Figure 54). If the Select Date/Time dialog is displayed, click the **Now** button to enter the current system date and time. When the Midnight button is clicked, "23:59" is displayed for the time on the date selected.
- Until a valid date and time are selected, fields after the Procedure Date and Time field are not visible. Once a valid date and time are selected, the remaining fields become visible and available for input.

Figure 54: Select Date/Time Dialog



Step 5. Select a Procedure Name.

- Select a procedure from the dropdown list.

Step 6. If applicable, the Reasons field will be enabled.

- The user can enter up to three reasons.
- Reason #1 must be entered before a second or third may be entered. Reason #2 must be entered before a third may be entered.
- Reasons appear alphabetically in the dropdown.
- A reason will not appear in the dropdown list for remaining reason fields as an option once selected.
- A reason can be selected by entering the initial letter(s) in the Reasons field. If the reason that appears is not the correct choice, click the down arrow on the reason dropdown to select another reason. or enter different letter(s).

Step 7. If applicable, the CPT Modifiers section will be enabled.

- Modifiers provide additional information about a CPT procedure. With functionality put in place by the Code Set Versioning project, only CPT modifiers that are active for the date and time of the event will show.
- Choose a modifier from the Modifiers Available list and click the right pointer icon . Repeat as needed.
- To remove a modifier, choose it from the Modifiers Selected list and click the left pointer icon .
- Press and hold the <**Ctrl**> key, and then click items to select multiple modifiers at one time.

Step 8. Select the providers of the services. Use the Providers Available text box to enter the following:

- Provider name (full or partial, last name first)
- Select the provider from the resulting dropdown list and click the right pointer icon .
- To remove a provider, select from the Providers Selected list and click the left pointer icon .

Step 9. Use the Patient Identifier field to select a patient.

- Enter one of the following:
  - Patient Name (whole or partial, last name first)
  - Social Security Number
  - Last four digits of the Patient Social Security Number
  - First character of Last Name plus the last four digits of the SSN with no spaces
- Press <**Enter**> on the keyboard or click the **Binoculars** (Search) button.
- Choose from the list of patients displayed.

Step 10. Select an Eligibility Code for this procedure.

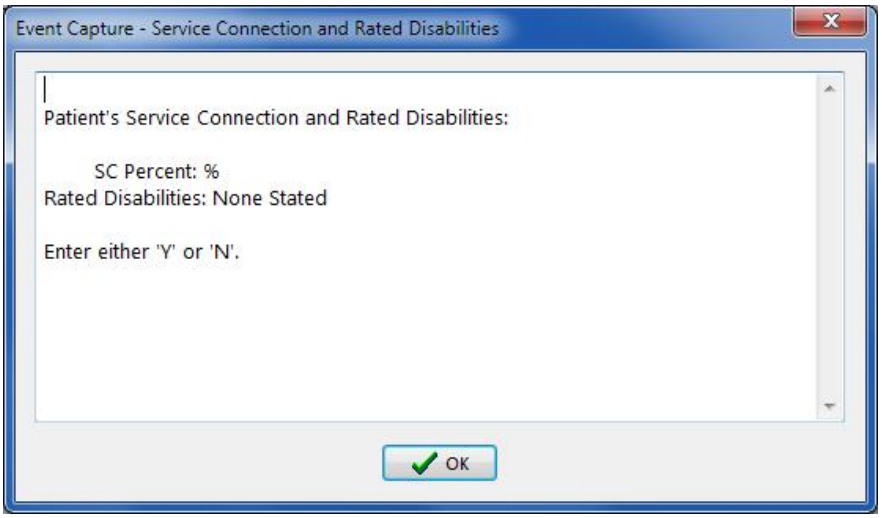
- If the selected patient has only one Eligibility Code, that value defaults. Otherwise, select the Eligibility Code that applies to this procedure.
- The primary Eligibility Code displays as the default.

Step 11. Enter the Volume for the procedure.

Step 12. If applicable, the mandatory classification questions section will be enabled.

- Select **YES** only if the treatment received relates to that classification.
- Pressing the <**F1**> key while in the Service Connected field will open a message dialog displaying the patient's service connection and any rated disabilities (Figure 55).

Figure 55: Service Connection and Rated Disabilities Dialog



Step 13. Select the Ordering Section.

Step 14. Select an Associated Clinic for the specified DSS Unit, if applicable.

Note

- A clinic must exist in file #728.44 Clinics and Stop Codes prior to being available for selection in any Data Entry option.
- If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.

Step 15. Select the associated diagnosis code for the procedure.

- Search for a diagnosis by entering one of the following in the Dx (Diagnosis) Lookup box (Figure 56):
  - International Classification of Diseases (ICD) code (whole or partial)
  - Diagnosis Name (whole or partial)
- Click the **Binoculars** (Search) button to the right of the Dx Lookup box or press <**Enter**> to begin the search.

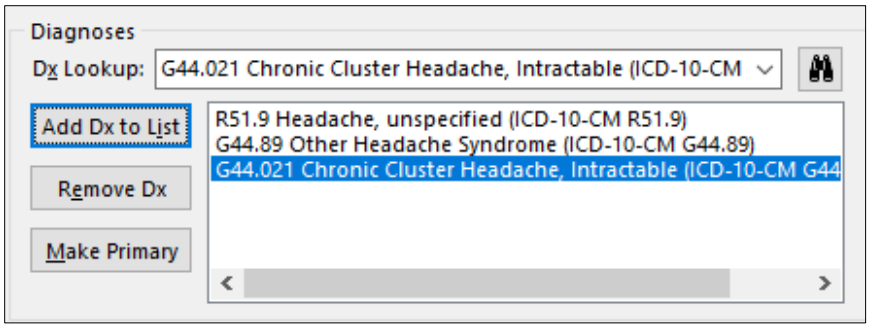
- Select from the resulting dropdown list and click the **Add Dx to List** button to place the desired diagnosis in the Diagnoses box. The user can also double-click on a diagnosis to add it.

  Note

  - If an ICD code is used to search for a diagnosis, the user can press <**Enter**> to place the diagnosis in the Diagnoses box.

- Repeat as needed to select and add multiple diagnoses.
- Values in the Diagnoses box may be removed, or the Primary Diagnosis may be changed, by selecting a diagnosis and using the associated buttons to the left of the Diagnoses box. **The primary diagnosis will always be the first entry in the Diagnoses box.**

Figure 56: Same Procedure, Multiple Patients, Data Entry Diagnoses Box



Step 16. Repeat steps 9 through 15 to add the same procedure for another patient.

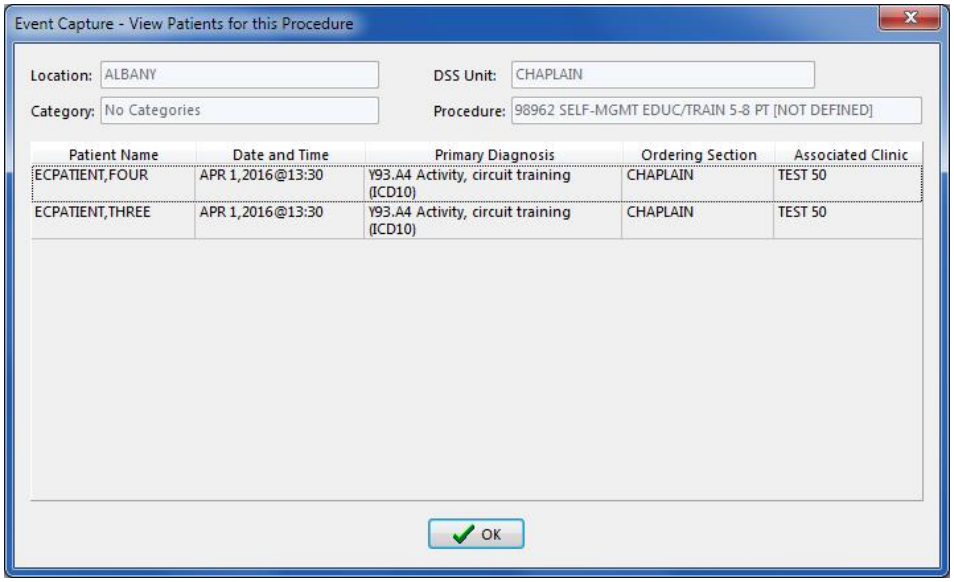
Step 17. Click the View button to verify that the list of patients entered is correct.

- The View Patients for this Procedure screen will list all the patients entered for the procedure that was selected (Figure 57).

Step 18. When all patients have been added for the current procedure, click the OK button to file the records, or click the Cancel button to return to the Data Entry menu without filing the records.

Step 19. To correct an entry, return to the Data Entry menu and select Data Entry by Patient.

Figure 57: View Patients for this Procedure Screen



4.1.3 Multiple Dates/Multiple Procedures

The Multiple Dates/Multiple Procedures option allows the user to add multiple dates and multiple patients for multiple procedures.

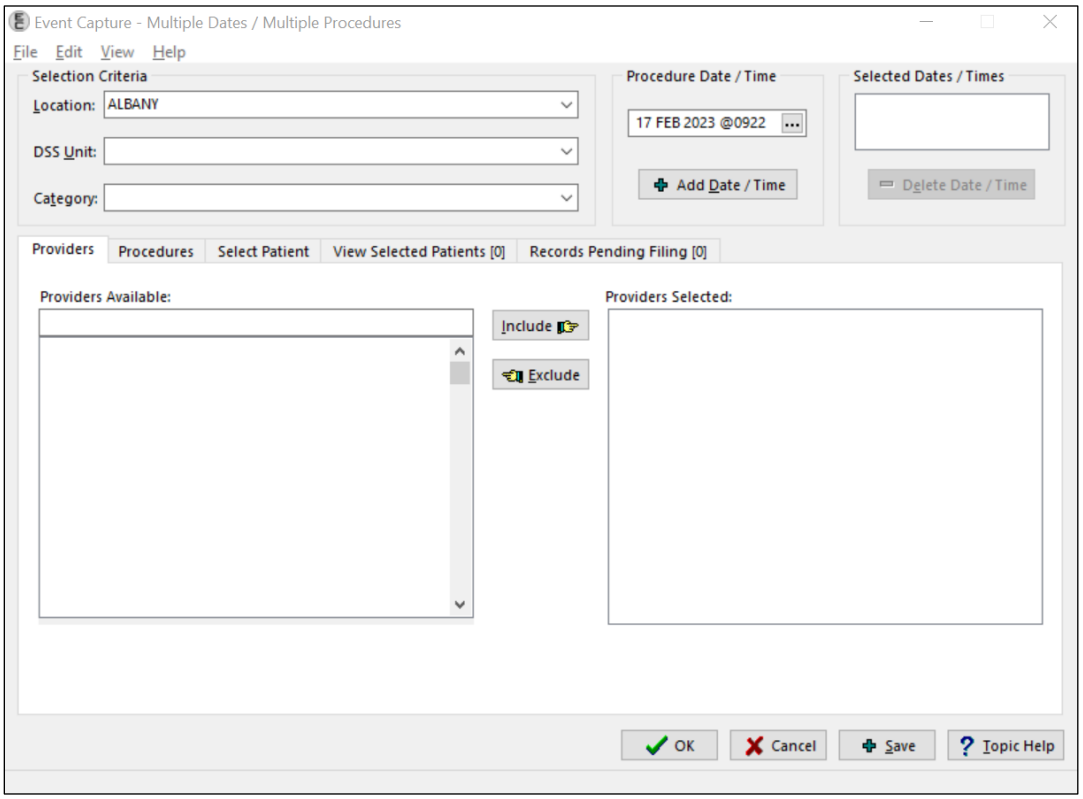
Before the User Starts

- Event Code Screens must be defined before entering any Event Capture data.

What the User Will See

- After selecting Multiple Dates/Multiple Procedures from the Data Entry Menu, the Multiple Dates/Multiple Procedures screen displays (Figure 58).
- The area at the top of the first screen provides common fields (Location, DSS Unit, and Category) as well as the Procedure Date/Time.
- The first three tabs allow the user to enter providers, procedures, and patients (Providers, Procedures, and Select Patient).
- The last two tabs allow the user to check the work before submitting (View Selected Patients and Records Pending Filing). The number of patients selected and the number of records pending are displayed on the tab headers.

Figure 58: Multiple Dates/Multiple Procedures Screen — Initial Screen



4.1.3.1 Instructions for Common Fields

Step 1. Select a Location.

- If there is only one Location set up for the Event Capture System, the Location on the screen will default to that value.
- If there is more than one Event Capture Location set up, the Location will default to the last Location used. To change the Location, choose a Location from the dropdown list of available Event Capture Locations.

Step 2. Select a DSS Unit.

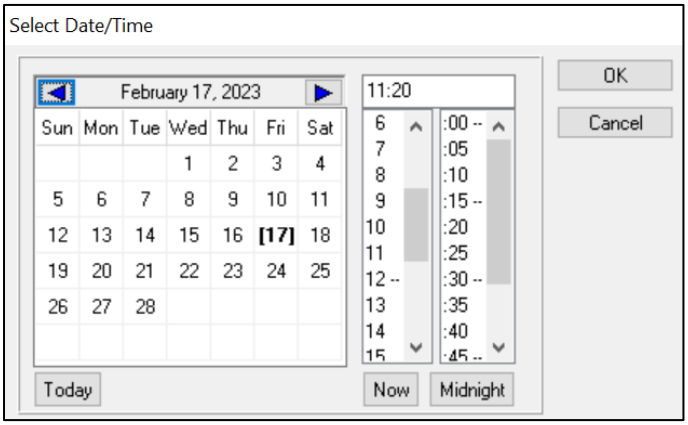
- If one DSS Unit is defined in Event Capture, or if only one DSS Unit is assigned to the user, that DSS Unit will be the default value.
- If more than one DSS Unit is defined, a default will not be assigned. Choose a DSS Unit from the dropdown list of accessible DSS Units.
- To gain access to an existing DSS Unit, the Event Capture Manager must assign it to the user.

Step 3. Select a Category.

- If categories are not allowed in the DSS Unit, the selection box will be disabled.
- If only one category is defined for the specified DSS Unit, that category will be the default.

Step 4. Select the Procedure Date and Time by using the Select Date/Time dialog (Figure 59).

Figure 59: Select Date/Time Dialog



- Select date and time and click the **OK** button to close the dialog.
- Click the **Add Date/Time** button to add the choice to the Selected Dates / Times list.
- Select and add dates as needed.
- To remove a date, choose it from the list and click the **Delete Date/Time** button.

Note:

- The Procedure Date/Time field defaults to the current system date and time.

- To enter the current system date and time, click the **Now** button on the Select Date/Time dialog.
- When the **Midnight** button is clicked, "23:59" is displayed as the time on the date selected.

Step 5. Click and complete the tabs for Providers, Procedures and Select Patient as described in the following sections:

4.1.3.2 — Add Information to the Providers Tab

4.1.3.3 — Add Information to the Procedures Tab

4.1.3.4 — Add Information to the Select Patient Tab

Step 6. Use the View Selected Patients and Records Pending Filing tabs to check the work as described in the following sections:

4.1.3.5 — Verify Information Using the View Selected Patients Tab

4.1.3.6 — Verify Information Using the Records Pending Filing Tab

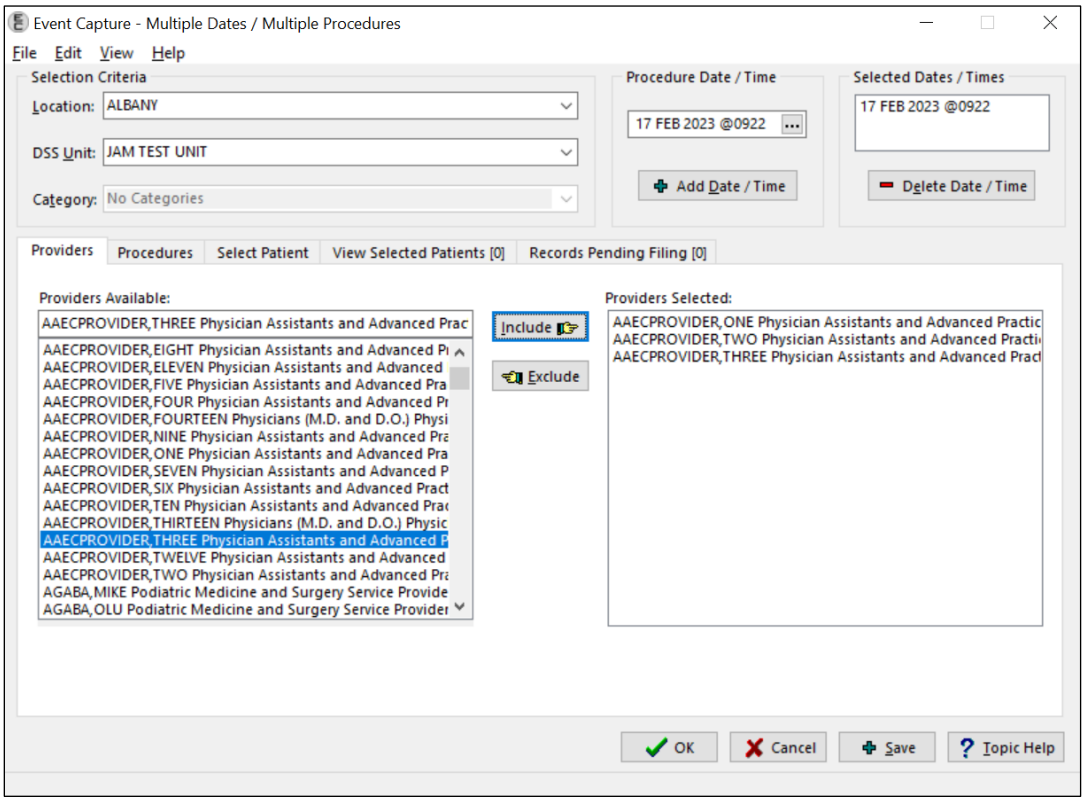
Step 7. Click the Save button at the bottom of the screen to process the transactions shown on the Records Pending Filing tab and continue to enter a new set of entries.

Step 8. Click the OK button at the bottom of the screen to process the transactions shown on the Records Pending Filing tab, and then return to the Data Entry menu.

4.1.3.2 Add Information to the Providers Tab

Step 1. Click the Providers tab to select one or more providers (Figure 60).

Figure 60: Multiple Dates/Multiple Procedures Screen, Providers Tab



Step 2. Select a Provider.

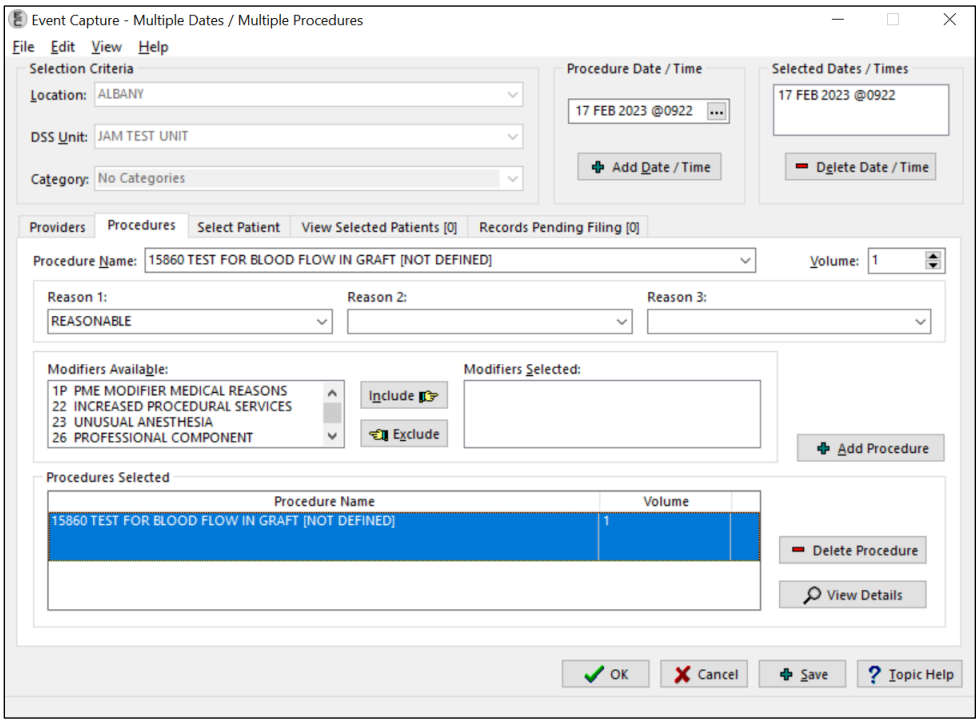
- Use the Providers Available list to enter the full or partial provider name (last name first).
- Select the provider from the resulting dropdown list and click the **Include** button.
- To remove a provider, select from the Providers Selected list and click the **Exclude** button.

Step 3. Repeat as needed to add providers.

4.1.3.3 Add Information on the Procedures Tab

Step 1. Click the Procedures tab to select one or more procedures (Figure 61).

Figure 61: Multiple Dates/Multiple Procedures Screen, Procedures Tab



Step 2. Select a Procedure Name.

- Select a procedure from the dropdown list.

Step 3. Enter the Volume for this procedure.

Step 4. If applicable, the Reasons field will be enabled.

- The user can enter up to three reasons.
- Reason #1 must be entered before a second may be entered. Reason #2 must be entered before a third may be entered.
- Reasons appear alphabetically in the dropdown.
- A reason will not appear in the dropdown list for remaining reason fields as an option once selected.
- A reason can be selected by entering the initial letter(s) in the Reasons field. If the reason that appears is not the correct choice, click the down arrow on the reason dropdown to select another reason, or enter different letter(s).

Step 5. If applicable, the Modifiers section will be enabled.

- Modifiers provide additional information about a CPT procedure. With functionality put in place by the Code Set Versioning project, only CPT modifiers that are active for the date and time of the event will display.
- Choose a Modifier from the Modifiers Available list and click the **Include** button.

- Repeat as needed.
- To remove a modifier, choose it from the Modifiers Selected list and click the **Exclude** button.
- Press and hold the <**Ctrl**> key, and then click items to select multiple modifiers at one time.

Step 6. Click the Add Procedure button to add this procedure to the Procedures Selected list and display a blank screen ready for another entry.

Step 7. To add another procedure, repeat the steps above.

Note

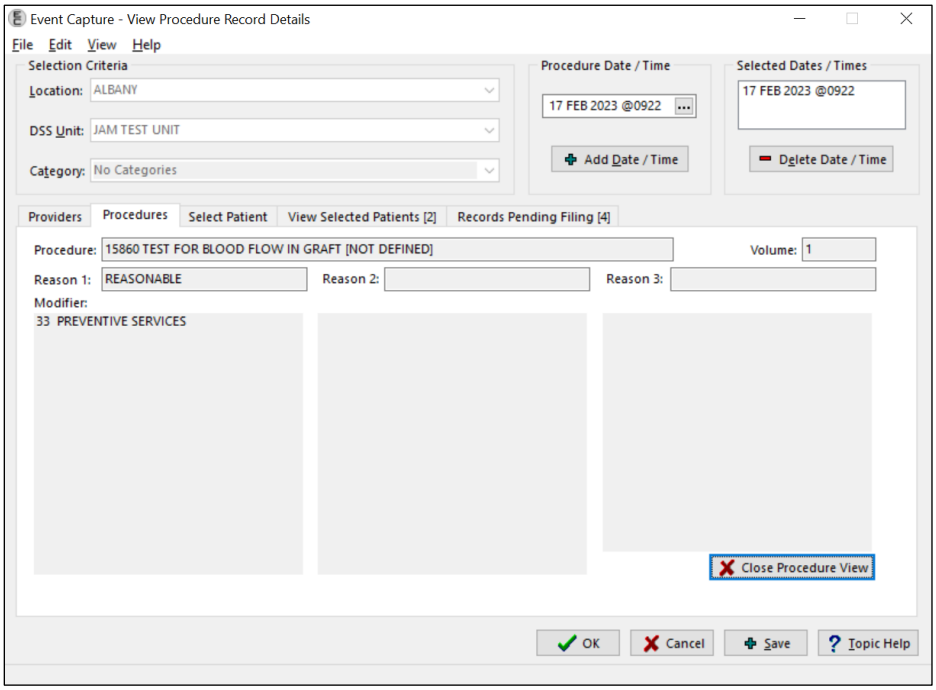
- Diagnoses which exist for the same location, procedure date/time, Associated Clinic and patient will be retrieved when those key fields are encountered for a new procedure.

Step 8. To delete a procedure, choose it from the Selected Procedures list and click the Delete Procedure button.

Step 9. To view a procedure in an expanded format, choose it from the Selected Procedures list and click the View Details button. The View Procedure Record Details screen (Figure 62) is not editable.

Step 10. Click the Close Procedure View button to return to the Procedures tab

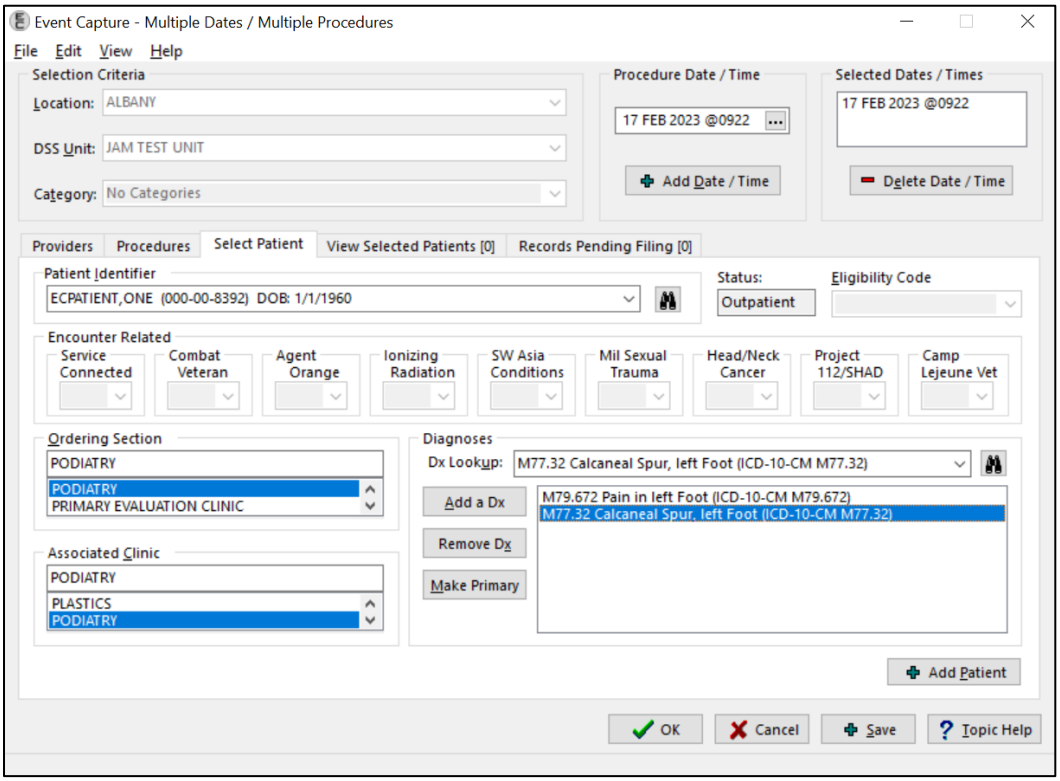
Figure 62: View Procedure Record Details Screen



4.1.3.4 Add Information to the Select Patient Tab

Step 1. Click the Select Patient tab to select one or more patients (Figure 63).

Figure 63: Multiple Dates/Multiple Procedures Screen, Select Patient Tab



Step 2. Use the Patient Identifier field to select a patient.

- Enter one of the following:
  - Patient Name (whole or partial, last name first)
  - Social Security Number
  - Last four digits of the patient Social Security Number
  - First character of Last Name plus the last four digits of the SSN with no spaces
- Press <**Enter**> or click the **Binoculars** (Search) button.
- Choose from the list of patients displayed.

Step 3. Select an Eligibility Code for this procedure.

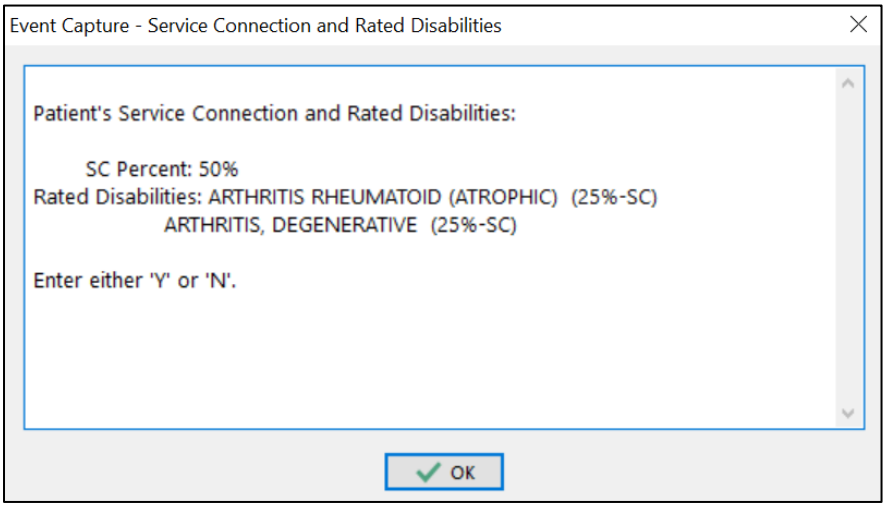
- If the selected patient has only one Eligibility Code, that value defaults. Otherwise, select the Eligibility Code that applies to this procedure.
- The primary Eligibility Code displays as the default.

Step 4. If applicable, the mandatory Encounter Related classification questions section will be enabled.

- Select **YES** only if the treatment received relates to that classification.

- Pressing the <**F1**> key while in the Service Connected field will open a message dialog displaying the patient's service connection and any rated disabilities (Figure 64).

Figure 64: Service Connection and Rated Disabilities Dialog



Step 5. Select the Ordering Section.

Step 6. Select the Associated Clinic.

Note

- A clinic must exist in file #728.44 Clinics and Stop Codes prior to being available for selection in any Data Entry options.
- If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.

Step 7. Select the associated diagnosis code for the procedure.

Note

- Diagnoses which exist for the same location, procedure date/time, Associated Clinic and patient will be retrieved when those key fields are encountered for a new procedure.

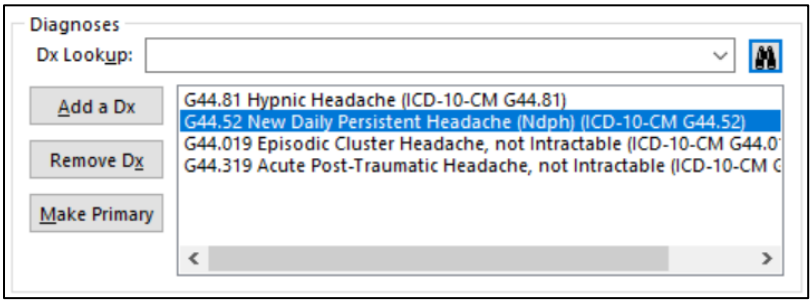
- Search for a diagnosis by entering one of the following in the Dx (Diagnosis) Lookup box (Figure 65):
  - International Classification of Diseases (ICD) code (whole or partial)
  - Diagnosis Name (whole or partial)
- Click the **Binoculars** (Search) button to the right of the Dx Lookup box or press <**Enter**> to begin the search.
- Select from the resulting dropdown list and click the **Add a Dx** button to place the desired diagnosis in the Diagnoses box. The user can also double-click on a diagnosis to add it.

Note

- If an ICD code is used to search for a diagnosis, the user can press <**Enter**> to place the diagnosis in the Diagnoses box.

- Repeat as needed to select and add multiple diagnoses.
- Values in the Diagnoses box may be removed, or the Primary Diagnosis may be changed, by selecting a diagnosis and using the associated buttons to the left of the Diagnoses box. **The primary diagnosis will always be the first entry in the diagnosis box.**

Figure 65: Multiple Dates/Multiple Procedures, Select Patient Tab, Diagnoses Box



Step 8. Click the Add Patient button to add this patient to the list of Selected Patients and display a blank screen ready for another entry.

Step 9. Use the View Selected Patients tab to check the work.

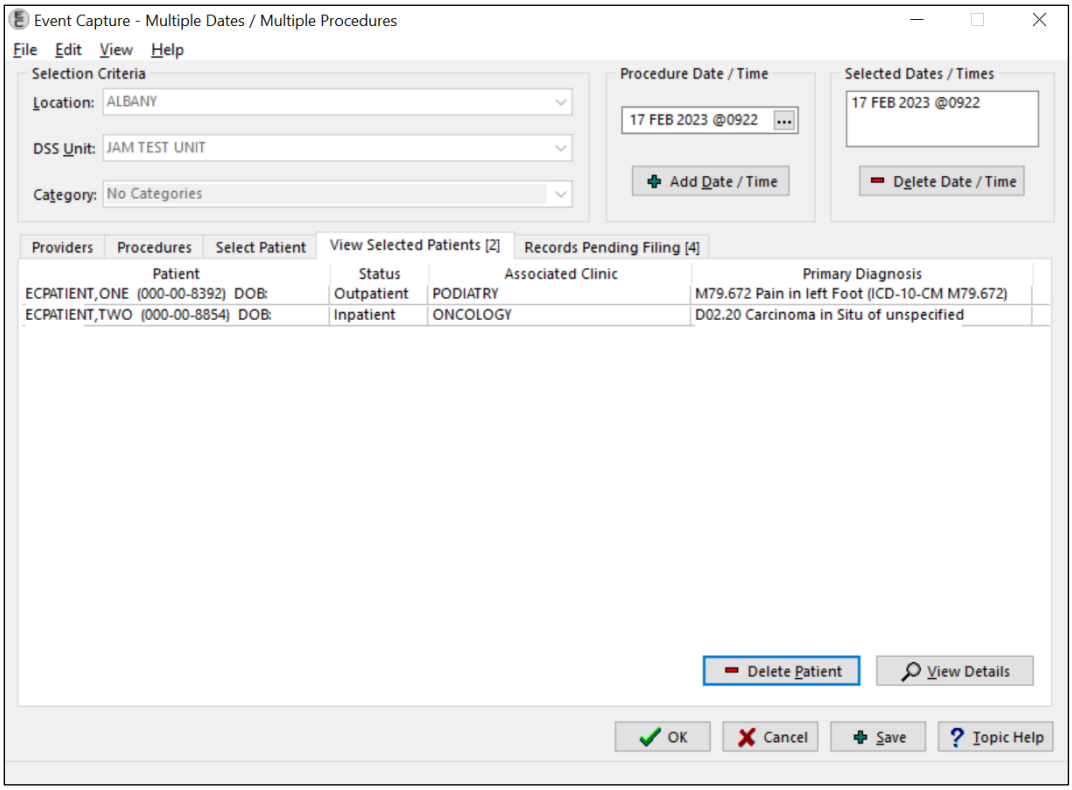
4.1.3.5 Verify Information Using the View Selected Patients Tab

The following instructions are used to verify information using the View Selected Patients tab, and to delete information for a specific patient.

Note that the number of patients selected by the user is displayed on the tab header.

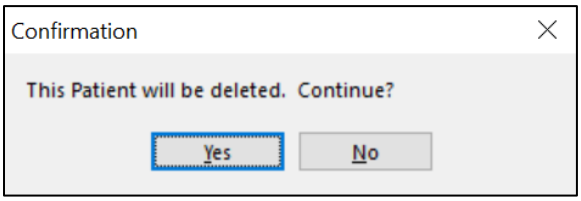
Step 1. Click the View Selected Patients tab to review the list of selected patients (Figure 66).

Figure 66: Multiple Dates/Multiple Procedures View Selected Patients Tab



Step 2. To remove a patient from the list, select a record and click the Delete Patient button. Click the Yes button on the Confirmation message dialog (Figure 67).

Figure 67: Deleting Patient Confirmation Dialog



Step 3. To view a patient in an expanded format, select the record and click the View Details button.

- The patient record is not editable using the View Patient Record Detail screen (Figure 68).

Step 4. Click the Close Patient View button to return to the View Selected Patients tab.

Figure 68: View Patient Record Details Screen

Event Capture - View Patient Record Details

File Edit View Help

Selection Criteria

Location: ALBANY

DSS Unit: JAM TEST UNIT

Category: No Categories

Procedure Date / Time

17 FEB 2023 @0922

Add Date / Time

Selected Dates / Times

17 FEB 2023 @0922

Delete Date / Time

Providers | Procedures | Select Patient | View Selected Patients [2] | Records Pending Filing [4]

Patient: ECPATIENT,ONE (000-00-8392) DOB: 1/1/1960

Status: Outpatient

Eligibility Code:

Service Connected: N/A

Ordering Section: PODIATRY

Associated Clinic: PODIATRY

Combat Veteran: N/A

Military Sexual Trauma: N/A

Agent Orange: N/A

Head/Neck Cancer: N/A

Ionizing Radiation: N/A

Project 112 / SHAD: N/A

SW Asia Conditions: N/A

Camp Lejeune Veteran:

Diagnoses:
M79.672 Pain in left Foot (ICD-10-CM M79.672)
M77.32 Calcaneal Spur, left Foot (ICD-10-CM M77.32)

Close Patient View

OK | Cancel | Save | Topic Help

4.1.3.6 Verify Information Using the Records Pending Filing Tab

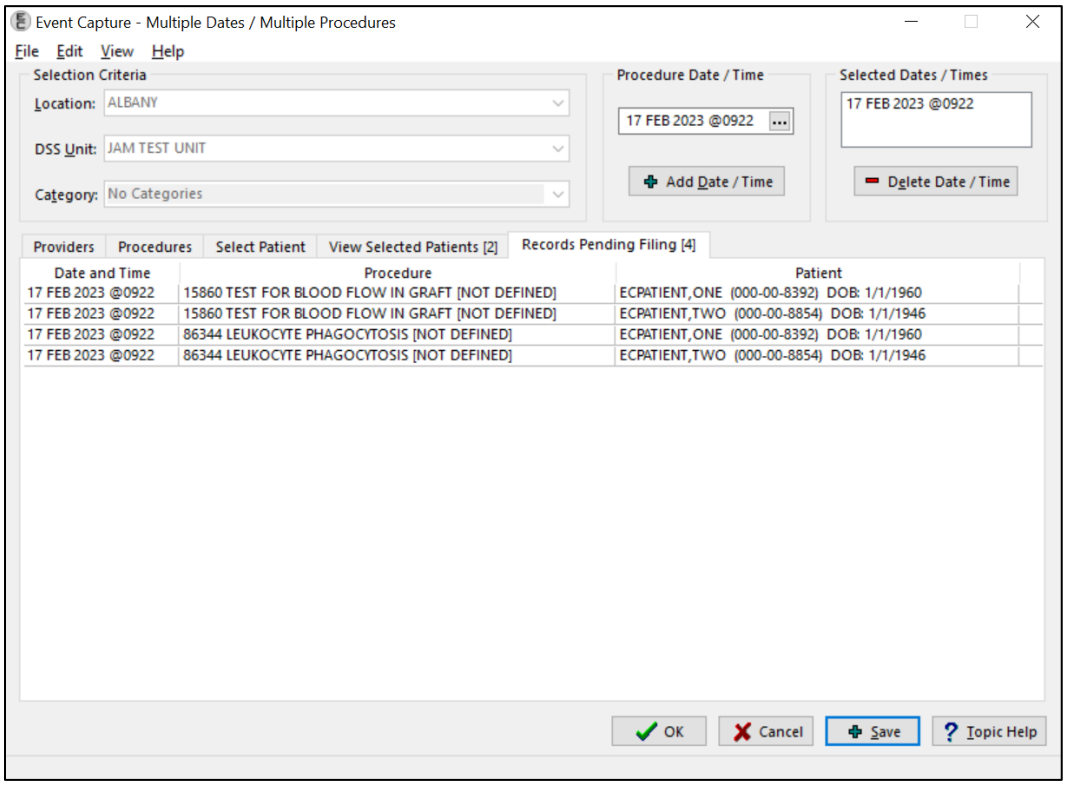
The Records Pending Filing tab lists the individual records (transactions) that will be processed when the **OK** or **Save** button at the bottom of the screen is clicked (Figure 69).

Step 1. Click the Records Pending Filing tab to view a list of the records to be filed.

Note:

- The number of records pending is displayed on the tab header.
- This screen is not editable.

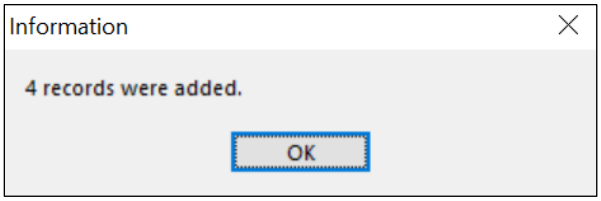
Figure 69: Multiple Dates/Multiple Procedures Records Pending Filing Tab



Step 2. Click the OK button to return to the Data Entry menu or click Save to add more entries.

- After clicking the **Save** button, an information dialog will appear on the screen to show the number of records added (Figure 70).

Figure 70: Information Dialog after Saving



The records consist of every combination of the dates, procedures, and patients selected on the tabs described in the preceding sections, and the providers selected will be assigned to each record.

Step 3. To change the list of records pending filing, review and revise the selections on the Providers, Procedures and Select Patient tabs. as well as the values on the Selected Dates/Times list.

Step 4. To correct an entry, return to the Data Entry menu and select Data Entry by Patient.

4.2 Spreadsheet

Data can be batch processed in the Event Capture GUI using the spreadsheet import and upload options. Two types of spreadsheets can be used for this data entry — the regular spreadsheet or the State Veterans Home spreadsheet. Both methods of import are launched from the Spreadsheet Upload screen. Once a spreadsheet is imported into Event Capture, the data can be uploaded to VistA.

4.2.1 Import a Regular Spreadsheet

Importing is the traditional method for batch processing spreadsheet data. The spreadsheet import functionality works with MS Excel® files, as well as with tab or comma delimited files.

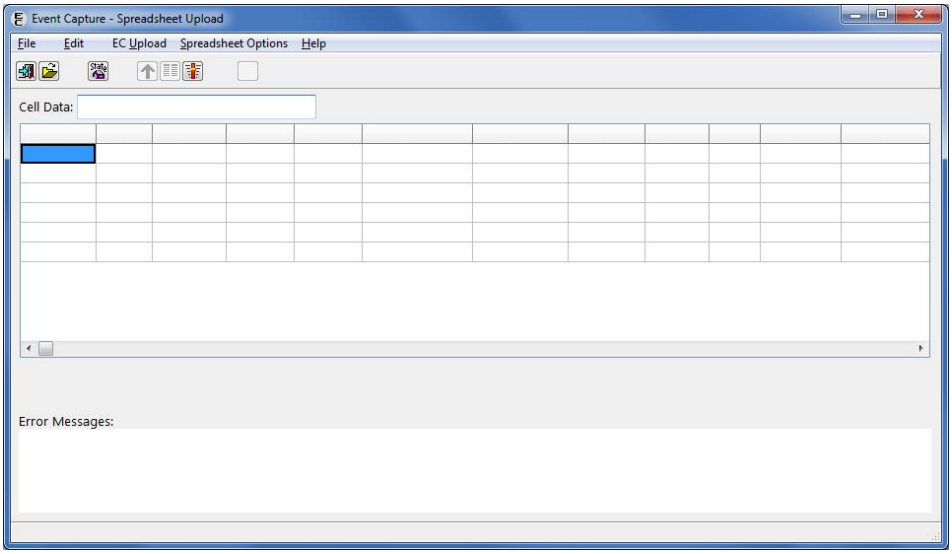
Before the User Starts

- A template with default column order is available to aid in populating spreadsheets prior to import. The header row will not be processed when data is imported, and it should remain in the spreadsheet during the import process.
- Any spreadsheets that do not match the column layout of the template will be rejected at import.
- The ECS spreadsheet template is available on the VA Intranet, Program Documents page.
- Once the template is downloaded, save it to a local hard-drive for later use.
- Both *.XLS (pre- 2007) and *.XLSX versions of MS Excel spreadsheets are valid for use in the Event Capture spreadsheet import process.

What the User Will See

- After selecting the Spreadsheet option from the main menu, the Spreadsheet Upload screen displays a blank grid form (Figure 71).

Figure 71: Spreadsheet Upload Screen Before Import



Steps for importing a regular spreadsheet:

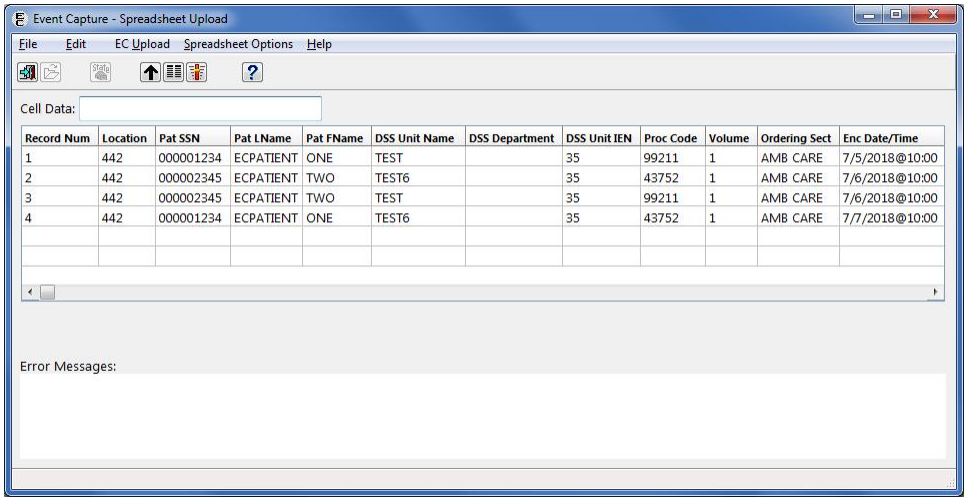
Step 1. Click the Open a Regular Spreadsheet button or select the Open Spreadsheet option from the File menu.

- A standard Select File dialog will display, allowing the user to select the spreadsheet to be imported.

Step 2. Once the desired spreadsheet is selected for import, click the Open button.

- The data is then imported into Event Capture and will be displayed in the grid of the Spreadsheet Upload form (Figure 72).

Figure 72: Imported Spreadsheet Data Shown in the Spreadsheet Upload Form



Record Num	Location	Pat SSN	Pat LName	Pat FName	DSS Unit Name	DSS Department	DSS Unit IEN	Proc Code	Volume	Ordering Sect	Enc Date/Time
1	442	000001234	ECPATIENT	ONE	TEST		35	99211	1	AMB CARE	7/5/2018@10:00
2	442	000002345	ECPATIENT	TWO	TEST6		35	43752	1	AMB CARE	7/6/2018@10:00
3	442	000002345	ECPATIENT	TWO	TEST		35	99211	1	AMB CARE	7/6/2018@10:00
4	442	000001234	ECPATIENT	ONE	TEST6		35	43752	1	AMB CARE	7/7/2018@10:00

4.2.1.1 Regular Spreadsheet Fields

The regular spreadsheet contains 37 columns. Each is described here:

Record Num: The Record Num field displays the Record Number, which is a unique number used to associate error messages with the correct row of data. If this field is blank, VistA validation will not be done. This is a required field.

Location: The Location field displays the station number, and it must exist in the INSTITUTION file (#4). This is a required field.

Pat SSN: The Pat SSN is the SSN of the patient for whom the procedure was done. It can contain only digits, and must exist in the PATIENT file (#2, ^DPT). If the SSN is shorter than 9 digits, it will be padded with leading zeros. This is a required field.

Patient LName: The Patient Lname (last name) field is the surname of the patient and must contain a value at least two characters in length. Combined with the Patient FName value (in the form “last name, first name”), it must match the name in the PATIENT file (#2) for the Patient SSN associated with the row in the spreadsheet. This is a required field.

Patient FName: The Patient Fname (first name) field is optional. However, together with the Patient LName (in the form “last name, first name”), it must match the name in the PATIENT file (#2) for the Patient SSN associated with the row in the spreadsheet.

DSS Unit Name: The DSS Unit Name field indicates the DSS Unit used for the patient procedure. The DSS Unit Name is not required if the DSS Unit IEN is filled in. If this field contains a value, then it must have a “B” cross-reference on the DSS UNIT file (#724).

DSS Department: Because the DSS Department is not necessarily unique, it is no longer being used to identify the DSS Unit. Values entered in this field will be ignored. Use the DSS Unit Name or the DSS Unit IEN to identify the DSS Unit.

DSS Unit IEN: The DSS Unit IEN is an alternate way to identify the DSS Unit used for the patient procedure. It is not required if the DSS Unit Name is filled in. If the DSS Unit IEN field contains a value, that value must exist in the DSS UNIT file (#724).

Proc Code: The Proc Code or CPT code represents the procedure performed for the patient. Any National Procedure, Local Procedure, or CPT code is valid for this field provided it exists in the EC NATIONAL PROCEDURE file (#725) or the CPT file (#81), and the Event Code Screen (comprised of the Location, DSS Unit, and Procedure) is active. This is a required field.

Volume: The Volume field usually indicates the number of procedures performed, but it can also be used to track the number of bed days, or the time increments spent performing the procedure. For example, if a 15-minute increment represents a unit, a Volume of 1 equals 15 minutes, a volume of 2 equals 30 minutes, etc. The volume must be a number from 1 to 99. This is a required field.

Ordering Sect: The Ordering Sect field is the name of the medical section which ordered the procedure for the patient. If the user enters a value for the Ordering Section, it will be validated against the "B" cross reference in the MEDICAL SPECIALTY file (#723). If the user leaves this field blank, the program will derive the Ordering Section from DSS UNIT file (#724) based on the DSS Unit IEN.

Enc Date/Time: The Enc Date/Time field is the Date and Time of the encounter. The value can be in any valid FileMan format. The 'seconds' are ignored; the month, day, and year can be separated by any special character (non-numeric, non-alpha) except '^' and '@'. This field is required.

```
Examples:
      mm/dd/yy @hh:mm:ss
      mm/dd/yyyy @hh:mm:ss
      mm-dd-yy @hh:mm
      mmm dd,yyyy @hhmm
      mmddyy@hhmm
      N, N-1, N-5h, etc.
```

Category: The Category field provides Event Capture a common level to group associated procedures. Multiple procedures can be defined for each category. This field is optional and will be assigned a value of '0' if blank. However, if the user enters a value, a "B" cross-reference for that value must exist in the EVENT CAPTURE CATEGORY file (#726).

Diag Code: The Diag Code field is the primary Diagnosis Code value. It must exist in the ICD DIAGNOSIS file (#80) and be active for the date/time of the encounter.

Note:

- The Diagnosis Code is only required for records sent to PCE and will be ignored otherwise. For DSS units set up as 'OOS', the diagnosis field will be ignored.

Sec Dx 1: The Sec Dx 1 field is a secondary Diagnosis Code value. It must exist in the ICD DIAGNOSIS file (#80) and be active for the date/time of the encounter.

Note:

- Secondary diagnosis codes are optional. For records NOT sent to PCE (including those with DSS set up as 'OOS'), the diagnosis codes will be ignored.

Sec Dx 2: The Sec Dx 2 field is a secondary Diagnosis Code value. It must exist in the ICD DIAGNOSIS file (#80) and be active for the date/time of the encounter.

Note:

- Secondary diagnosis codes are optional. For records NOT sent to PCE (including those with DSS set up as 'OOS'), the diagnosis codes will be ignored.

Sec Dx 3: The Sec Dx 3 field is a secondary Diagnosis Code value. It must exist in the ICD DIAGNOSIS file (#80) and be active for the date/time of the encounter.

Note:

- Secondary diagnosis codes are optional. For records NOT sent to PCE (including those with DSS set up as 'OOS'), the diagnosis codes will be ignored.

Sec Dx 4: The Sec Dx 4 field is a secondary Diagnosis Code value. It must exist in the ICD DIAGNOSIS file (#80) and be active for the date/time of the encounter.

Note:

- Secondary diagnosis codes are optional. For records NOT sent to PCE (including those with DSS set up as 'OOS'), the diagnosis codes will be ignored.

Assoc Clin Name: The Assoc Clin Name is the name of the Associated Clinic of the procedure. If the DSS Unit is set to send all records to PCE, either an Associated Clinic name or Associated Clinic IEN is required. If both are entered, only the IEN will be used to identify the Associated Clinic.

Assoc Clin IEN: The Assoc Clin IEN field is the IEN of the Associated Clinic of the procedure. If the DSS Unit is set to send all records to PCE, either an Associated Clinic name or Associated Clinic IEN is required. If both are entered, only the IEN will be used to identify the Associated Clinic.

Mod 1: The Mod 1 field provides additional information about a CPT procedure. Up to 5 unique Modifier codes can be entered for a procedure. The Mod 1 field is not required.

Mod 2: The Mod 2 field provides additional information about a CPT procedure. Up to 5 unique Modifier codes can be entered for a procedure. The Mod 2 field is not required.

Mod 3: The Mod 3 field provides additional information about a CPT procedure. Up to 5 unique Modifier codes can be entered for a procedure. The Mod 3 field is not required.

Mod 4: The Mod 4 field provides additional information about a CPT procedure. Up to 5 unique Modifier codes can be entered for a procedure. The Mod 4 field is not required.

Mod 5: The Mod 5 field provides additional information about a CPT procedure. Up to 5 unique Modifier codes can be entered for a procedure. The Mod 5 field is not required.

Agent Orange: The Agent Orange field indicates whether the encounter was related to Agent Orange exposure (Y) or was not related to Agent Orange exposure (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

Ion Rad: The Ion Rad field indicates whether the encounter was related to Ionizing Radiation exposure (Y) or was not related to Ionizing Radiation exposure (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

Service Conn: The Service Conn field identifies if the encounter is related to a service connected condition and represents whether the patient has Service Connected eligibility (Y) or does not have Service Connected eligibility (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field

SW Asia: The SW Asia field indicates whether the encounter was related to Southwest Asia Conditions (Y) or was not related to Southwest Asia Conditions (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

Mil Sexual Trauma: The Mil Sexual Trauma field indicates whether the encounter was related to Military Sexual Trauma (Y) or was not related to Military Sexual Trauma (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

Head Neck Cancer: The Head Neck Cancer field indicates whether the encounter was related to Head and Neck Cancer (Y) or was not related to Head and Neck Cancer (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

Combat Vet: The Combat Vet field indicates whether the encounter was related to the patient's Combat Veteran status (Y) or was not related to the patient's Combat Veteran status (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

SHAD: The SHAD field indicates whether the encounter was related to Project Shipboard Hazard and Defense (SHAD) (Y) or was not related to Project SHAD (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

Camp Lejeune: The Camp Lejeune field indicates whether the encounter was related to Camp Lejeune exposure (Y) or was not related to Camp Lejeune exposure (N). When the spreadsheet is uploaded to VistA, validity checks will determine if a value is required in this field.

Prov 1 Name or IEN: The Prov 1 Name or IEN field displays the primary Provider for the patient procedure being added. The name (last name, first name) must exist in the NEW PERSON file (#200) and have a "B" cross reference in that file. The Provider must have an active Person Class unless the DSS Unit is set to send no records to PCE; in that case, a Non-Licensed Provider (identified in the "Providers" option on the ECS Management Menu) may be entered.

The provider's IEN may be entered instead of the name.

A value is required in the Prov 1 Name or IEN field.

Prov 2 Name or IEN: The Prov 2 Name or IEN field displays the secondary Provider for the patient procedure being added. The name (last name, first name) must exist in the NEW PERSON file (#200) and have a "B" cross reference in that file. The Provider must have an active Person Class unless the DSS Unit is set to send no records to PCE; in that case, a Non-Licensed Provider (identified in the "Providers" option on the ECS Management Menu) may be entered.

The provider's IEN may be entered instead of the name.

The Prov 2 Name or IEN field is optional.

Prov 3 Name or IEN: The Prov 3 Name or IEN field displays the tertiary Provider for the patient procedure being added. The name (last name, first name) must exist in the NEW PERSON file (#200) and have a "B" cross reference in that file. The Provider must have an active Person Class unless the DSS Unit is set to send no records to PCE; in that case, a Non-Licensed Provider (identified in the "Providers" option on the ECS Management Menu) may be entered.

The provider's IEN may be entered instead of the name.

The Prov 3 Name or IEN field is optional.

Prov 4 Name or IEN: The Prov 4 Name or IEN field displays the fourth Provider for the patient procedure being added. The name (last name, first name) must exist in the NEW PERSON file (#200) and have a "B" cross reference in that file. The Provider must have an active Person Class unless the DSS Unit is set to send no records to PCE; in that case, a Non-Licensed Provider (identified in the "Providers" option on the ECS Management Menu) may be entered.

The provider's IEN may be entered instead of the name.

The Prov 4 Name or IEN field is optional.

Prov 5 Name or IEN: The Prov 5 Name or IEN field displays the fifth Provider for the patient procedure being added. The name (last name, first name) must exist in the NEW PERSON file (#200) and have a "B" cross reference in that file. The Provider must have an active Person Class unless the DSS Unit is set to send no records to PCE; in that case, a Non-Licensed Provider (identified in the "Providers" option on the ECS Management Menu) may be entered.

The provider's IEN may be entered instead of the name.

The Prov 5 Name or IEN field is optional.

Prov 6 Name or IEN: The Prov 6 Name or IEN field displays the sixth Provider for the patient procedure being added. The name (last name, first name) must exist in the NEW PERSON file (#200) and have a "B" cross reference in that file. The Provider must have an active Person Class unless the DSS Unit is set to send no records to PCE; in that case, a Non-Licensed Provider (identified in the "Providers" option on the ECS Management Menu) may be entered.

The provider's IEN may be entered instead of the name.

The Prov 6 Name or IEN field is optional.

Prov 7 Name or IEN: The Prov 7 Name or IEN field displays the seventh Provider for the patient procedure being added. The name (last name, first name) must exist in the NEW PERSON file (#200) and have a "B" cross reference in that file. The Provider must have an active Person Class unless the DSS Unit is set to send no records to PCE; in that case, a Non-Licensed Provider (identified in the "Providers" option on the ECS Management Menu) may be entered.

The provider's IEN may be entered instead of the name.

The Prov 7 Name or IEN field is optional.

4.2.1.2 Edit Cell Data on the Spreadsheet Upload Form

All imported data can be modified in the Spreadsheet Upload form. The information from the selected cell is displayed in the Cell Data edit box (located above the grid). The value can be changed in either the edit box or the cell itself.

Data in each cell can be cut, copied, or pasted using the edit menu functions (Figure 73). The contents of an individual cell can be deleted using either the Cell Data edit box, or by clicking twice in the cell to highlight the data and pressing the <**Delete**> key.

Note:

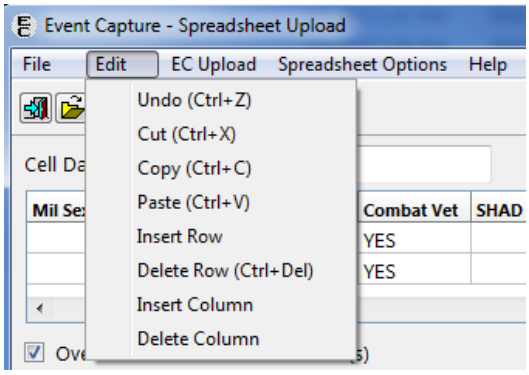
- Quickly double-clicking within the cell does not select the data within the cell. To select data within a cell, click once within the cell, then click again to select the cell’s contents.

To delete an entire record, click once on a cell within the record to be deleted, then press <**Ctrl + Delete**>. Alternatively, the user can select **Edit > Delete Row** from the menu bar. Rows can be inserted using the **Edit > Insert Row** function on the menu bar.

To delete a column within the Spreadsheet Upload form, select a cell within the column to be deleted, then use the **Edit > Delete Column** function. Columns can also be inserted using the **Edit > Insert Column** function on the menu bar.

For any accidental or undesired action performed, the user can undo that action by selecting **Edit > Undo** or by pressing <**Ctrl + Z**>. The undo function can be used multiple times to undo multiple actions.

Figure 73: Spreadsheet Upload — Edit Functions



Note:

- Help is available for each column in the spreadsheet. Click any column, and then click the **Help** button .

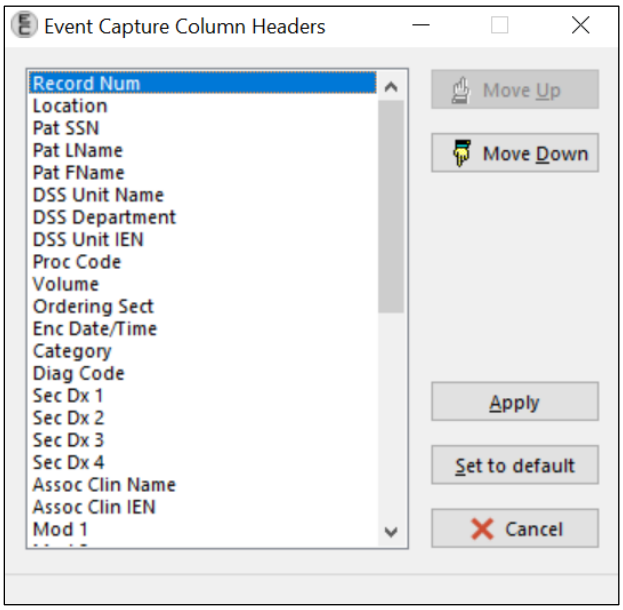
4.2.1.3 Modify Column Order

When the Spreadsheet Upload form is opened, the column headers are displayed in a default order. The user can change the order of the columns if the EC Template is not used.

Step 1. Click the Column Header button , or select the Change Column Headers option from the Spreadsheet Options menu.

- The Column Headers form will be displayed (Figure 74).

Figure 74: Column Headers Form



Step 2. To change the order of the columns, highlight the column heading from the list and click either the Move Up or Move Down button.

- Repeat Step 2 until the column order matches the columns order of the spreadsheet. Click the **Apply** button to save the column order.

Note:

- The default column header order is as follows:

1. Record Num
2. Location
3. Pat SSN
4. Pat LName
5. Pat FName
6. DSS Unit Name
7. DSS Department
8. DSS Unit Internal Entry Number (IEN)
9. Proc Code
10. Volume
11. Ordering Sect
12. Enc Date/Time
13. Category
14. Diag Code
15. Sec Dx 1
16. Sec Dx 2
17. Sec Dx 3
18. Sec Dx 4
19. Assoc Clinic Name
20. Assoc Clinic IEN
21. Mod 1
22. Mod 2
23. Mod 3
24. Mod 4
25. Mod 5
26. Agent Orange
27. Ion Rad
28. Service Conn
29. SW Asia
30. Mil Sexual Trauma
31. Head Neck Cancer
32. Combat Vet
33. SHAD
34. Camp Lejeune (Note: As of Patch EC*2*139, this column is a placeholder)
35. Prov 1 Name or IEN
36. Prov 2 Name or IEN
37. Prov 3 Name or IEN
38. Prov 4 Name or IEN
39. Prov 5 Name or IEN

40. Prov 6 Name or IEN
41. Prov 7 Name or IEN

4.2.2 Import a State Veterans Home Spreadsheet

State Veterans Home facilities use Excel spreadsheets for tracking patient occupancy. Event Capture can directly import, and upload, the data from these spreadsheets.

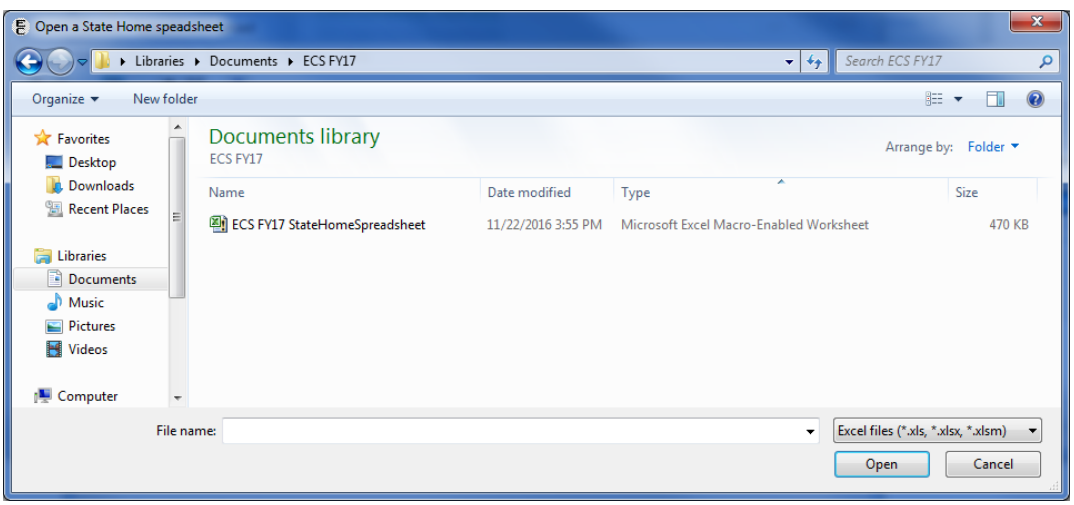
Before the User Starts

- The State Veterans Home spreadsheet template is available for download from the State Veterans Home website.
- Once the template is downloaded, save it to a local hard-drive for later use.
- Both *.XLS (pre- 2007) and *.XLSX versions of MS Excel spreadsheets are valid for use in the Event Capture spreadsheet import process.
- The State Veterans Home Name is in the spreadsheet in cell B853. The name starts after the second space. All control, "^", ";" and ":" characters are stripped from the text found in the cell. The name is then truncated to 25 characters.

What the User Will See

- From the Spreadsheet Upload screen, the user will click the **State Home Spreadsheet** icon or use the menu to select **File > Open State Home Spreadsheet**.
- A Select File Dialog opens, prompting the user to locate and select the appropriate State Veterans Home spreadsheet (Figure 75).

Figure 75: Select File Dialog — Open a State Veterans Home Spreadsheet



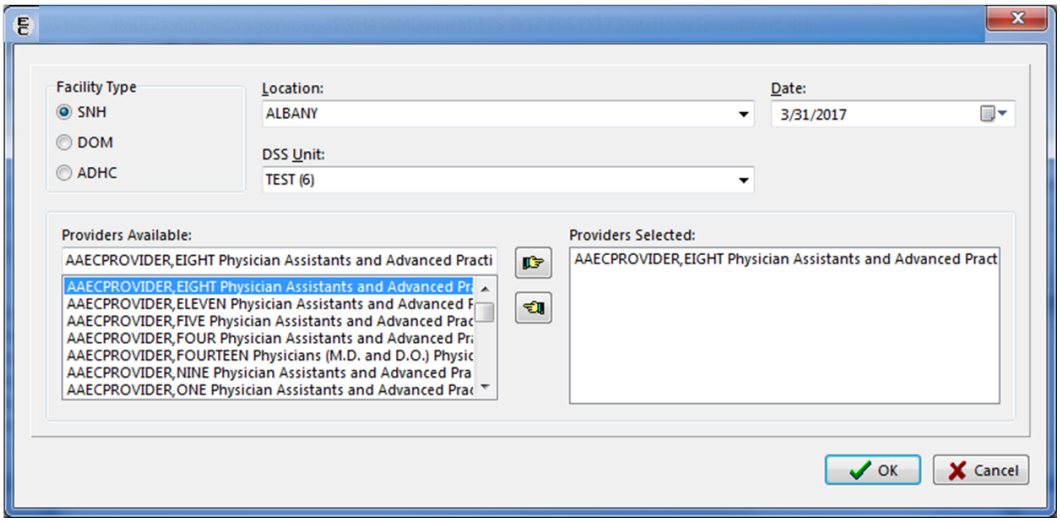
Note:

- Multiple months of State Veterans Home data can be stored in a single spreadsheet by using tabbed worksheets to represent the various months. Only the worksheet that was active when the spreadsheet was last saved will be imported.

Step 1. Once the desired State Veterans Home spreadsheet is selected for import, click the Open button.

- A screen prompting the user for more information, including Facility Type, Location, DSS Unit, Date and Provider(s), is displayed (Figure 76).

Figure 76: Additional Data Form for State Veterans Home Spreadsheet Import



Note:

- All fields must contain data to import a State Veterans Home spreadsheet.
- Click the **Cancel** button on this screen to abort the import process.

Step 2. Click the OK button on this screen to continue with the import.

- The data is then imported into Event Capture and will be displayed in the grid of the Spreadsheet Upload form.

4.2.3 Upload Imported Spreadsheet Data

To start the upload process, click the **Upload Records** button on the toolbar, or select the **Upload Records** to VistA option from the EC Upload menu.

Before the User Starts

- Each record in the imported spreadsheet is validated before being filed in the EVENT CAPTURE PATIENT file (#721).
- Two levels of validation occur:

The first level of validation occurs within the Event Capture GUI application. A check for required information is performed, and no data transmits to VistA if this level of validation fails for any record in the spreadsheet.

The second level of validation occurs on the server side for each record in the spreadsheet. Records that pass this level of validation are filed in the EVENT CAPTURE PATIENT file (#721); records that fail this level of validation are not filed. Records that are filed are removed from the spreadsheet grid, leaving only those records containing errors.

Each of the remaining records in the spreadsheet will have its associated error message(s) displayed in the Error Messages box. The errored record(s) can then be edited before retransmitting or deleting.

Note:

- To highlight the cell in the grid that most likely caused the error, select an error message. This will assist in identifying, and correcting, missing or invalid data.

What the User Will See

- A progress bar will display indicating what percentage of the upload is complete.
- Any failures or errors will be reported to the user.

4.2.3.1 Spreadsheet Upload Errors

During the upload process, misspelled names, blank spaces, misaligned columns, missing data such as answers to service connected questions, duplicate records and others can lead to upload errors. These must be cleared before the record(s) will upload. When upload errors occur, a list of all errors (Service Connected errors and others) is available for export by clicking the **Create Error XLS** button on the Spreadsheet Upload screen (Figure 77).

The following errors may display while uploading data to VistA via the Spreadsheet option:

- **Record Number:** When transmitting records, each row in the spreadsheet needs a unique record number (i.e., 1, 2, 3, etc.). If this field is blank, VistA validation will not be done.
  - Delphi messages
    - Error getting column with record number
    - Record number is a mandatory field
- **Location:** The location must exist in the INSTITUTION file (#4) (also known as ^DIC(4,D0,0), where D0 is the location number). During the spreadsheet upload process, Locations are identified by their STA6A identifiers.
  - VistA message
    - Location not in Institution file (#4) — Invalid Station Number
- **Pat SSN:** The Patient SSN must exist on the PATIENT file (#2) (also known as global file ^DPT). If the SSN is shorter than 9 digits, it will be filled with leading zeroes. Do not use dashes in the SSN.

- VistA messages
  - No SSN x-ref on PATIENT file (#2)
  - No SSN entry on PATIENT file (#2)
  - No internal entry on PATIENT file (#2) for SSN x-ref
  - SSN does not match SSN on PATIENT file (#2)

- **Patient LName and Patient FName:** The patient's name (last name, first name) must match the name on the PATIENT file (#2) for that SSN.
  - Delphi messages
    - Error getting column with Patient LName
    - Patient LName must be at least 2 characters long
  - VistA messages
    - Patient last name does not match VistA
    - Patient first name does not match VistA
- **DSS Unit Name:** If this field contains a value, then it must have a "B" cross-reference on the DSS UNIT file (#724). The DSS Unit Name is not required if the DSS Unit IEN contains a value.
  - VistA message
    - Invalid DSS Unit Name
- **DSS Unit IEN:** If this field contains a value, then it must exist on the DSS UNIT file (#724). The DSS Unit IEN is not required if the DSS Unit Name contains a value.
  - VistA message
    - Invalid DSS Unit IEN
- **Proc Code:** This is the Procedure or the CPT code value (not the description). A National Procedure, Local Procedure or CPT code is valid for this column. Either the Procedure must exist in the EC NATIONAL PROCEDURE file (#725), or the CPT must exist in the CPT file (#81). In addition, the Event Code Screen must be active for the Location, DSS Unit IEN, and Procedure/CPT combination. With functionality put in place by the Code Set Versioning project, only CPT codes that are active for the date and time of the event are processed.
  - VistA messages
    - Procedure or "D" x-ref not on EC NATIONAL PROCEDURE file (#725)
    - Procedure invalid for this Location and DSS Unit
    - Unable to check for active EC Event Code Screen
- **Volume:** The volume must be a number from 1 through 99.

- Delphi error messages
  - Error getting column with Volume number
  - Volume is a mandatory field
  - Volume has a limit of 2 digits
- VistA messages
  - Volume must be a number from 1 to 99
  - Volume must contain numeric characters only

- **Ordering Section:** This is the name of the Ordering Section. Validation (against the "B" cross-reference in the MEDICAL SPECIALTY file (#723)) occurs for Ordering Section values used in the spreadsheet. If this field is blank, the program will derive the Ordering Section from the DSS UNIT file (#724) using the DSS Unit IEN. The record will then be transmitted to the Event Capture filer program.
  - VistA message
    - Invalid Ordering Section
    - Unable to determine Ordering Section

- **Prov Name or IEN:** This is the Provider's last and first name as it appears in the "B" cross-reference of the NEW PERSON file (#200). If the provider also has a middle initial, then it should be included (e.g., 'ECPROVIDER, SEVEN J'). If the system finds a partial match for the name, the application will return the provider information (provider name, IEN, specialty, subspecialty, person class), and the user can then determine which provider is correct. The Provider Name must have a "B" cross-reference in the NEW PERSON file (#200), and the person class must be active.
  - VistA messages
    - Provider has no B x-ref on NEW PERSON file (#200)
    - Unable to determine person class
    - Provider does not have an active person class

- **Enc Date/Time:** The Encounter Date/Time can be in any valid FileMan format.
  - Examples
    - mm/dd/yy @hh:mm
    - mm/dd/yyyy @hh:mm
    - mm-dd-yy @hh:mm
    - mmddyy @hhmm
    - N, N-1, N-1H, etc.
  - VistA message
    - Invalid encounter date/time

- **Category:** The Category field can be blank. If the user enters a value, it needs to have a "B" cross-reference in the EVENT CAPTURE CATEGORY file (#726).
  - VistA message
    - Category "B" x-ref not on EC Category file (#726)

- **Diag Code:** This is the primary Diagnosis Code value. It must exist on the ICD DIAGNOSIS file (#80). With functionality put in place by the Code Set Versioning

project, only ICD codes that are active for the date and time of the event process are valid. The Diagnosis Code is only required for records sent to PCE. The system ignores it otherwise.

  - VistA messages
    - Diagnosis code is required for this DSS Unit
    - Unable to retrieve Diagnosis IEN

- **Assoc Clinic:** This is the Associated Clinic name. It must have a “B” cross-reference on the HOSPITAL LOCATION file (#44), be of type “C” (clinic), and be active for that encounter date. The Associated Clinic must have conforming stop codes to be selectable. The Associated Clinic is only required for records sent to PCE; otherwise, it will be ignored.
  - VistA messages
    - Associated Clinic is required for this DSS Unit
    - Assoc Clin “B” x-ref not found on HOSPITAL LOCATION file (#44)
    - Assoc Clin not found on HOSPITAL LOCATION file (#44)
    - Associated Clinic must be of type "C" (clinic)
    - Associated Clinic inactive for this encounter date

- **Modifier (1 through 5):** This is the Modifier, or Modifiers, associated with the procedure.
  - VistA message
    - Modifier is invalid or duplicated for the selected procedure

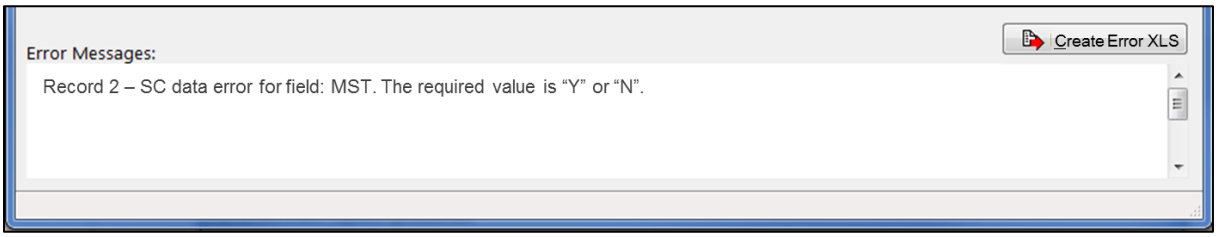
4.2.3.2 Service Connected Questions Validation

The Service Connected (SC) classification data validation and requirements are similar to those for records entered using other ECS data entry options. To assist the user in gathering SC information, Event Capture generates a spreadsheet of SC-related deficiencies found when transmitting the data.

When recording patient data in ECS using the spreadsheet menu and the ECS unit is set to send “ALL Records” to Patient Care Encounter (PCE), the SC classification data must also be entered. The care being entered into ECS must be identified as being related to the SC condition with the value of “Yes” or “No”. The records that are missing the SC data will fail the upload process and will be displayed in the Error Messages area at the bottom-left of the Spreadsheet Upload form.

When a row fails validation, a **Create Error XLS** button will appear above the Error Messages box (Figure 77).

Figure 77: Service Connected Error Messages and Create Error XLS Button



Click the button to generate an Excel spreadsheet, which the user can then save, print, or email to help resolve the errors. Service Connected errors are displayed on the “SC data required” tab (Figure 78). Any other errors (non-Service Connected errors) are displayed on the “Other errors” tab (Figure 79).

Figure 78: Export Errors — SC Data Required

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Last Name	First Name	Proc Code	Date and Time	Agent Orange	Ionizing Radiation	Service Connected	SW Asia	MST	Head Neck Cancer	Combat Vet	SHAD	Camp Lejeune	Error message
2	ECPATIENT	TWO	47352	2/14/2017@0800					Required Data					Record 2 - SC data error for fields: MST. The required value is "Y" or "N".
3														

SC data required | Other errors | Sheet3

Figure 79: Export Errors — Other Errors

	A	B	C	D
1	Record Number	Last Name	First Name	Error message
2	2	ECPATIENT	TWO	Record 2 - Provider has no B x-ref on New Person file(#200)
3	2	ECPATIENT	TWO	Record 2 - Invalid Diagnosis code

SC data required | Other errors | Sheet3

4.2.3.3 Duplicate Record Errors

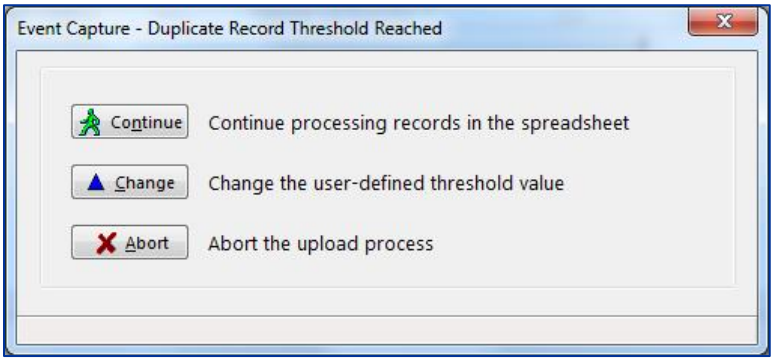
If the system detects duplicate records when the spreadsheet uploads, a File Duplicate Record(s) checkbox appears on the screen. The duplicate records display in the Error Messages box. Checking the File Duplicate Record(s) box and retransmitting the spreadsheet files the duplicate records in the EVENT CAPTURE PATIENT file (#721).

Note:

- Duplicate overrides can be disabled (or allowed) for any given DSS Unit.
- If an override is attempted for a DSS Unit where Allow Duplicate Override is set to No, the override will not succeed and will produce an error message similar to “The DSS Unit Associated with this record does not allow duplicate entries — Record NOT filed.”
- The Edit DSS Unit screen can be used by managers to allow or prevent duplicate overrides.

If the user-defined threshold of duplicate records is reached, a screen is displayed with the options to continue processing the records, change the threshold, or abort the upload (Figure 80).

Figure 80: Duplicate Record Threshold Reached Screen

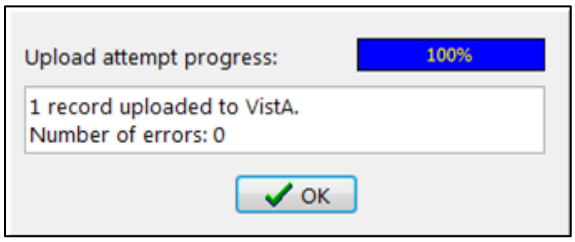


- **Continue:** Resets the counter and resumes processing records.
- **Change:** Allows the user to change the duplicate record threshold.
  - This threshold can also be altered prior to starting the upload process by selecting the Change Duplicate Threshold option from the Spreadsheet Options menu or by clicking the **Duplicate Threshold** button.
- **Abort:** Terminates the upload process.

4.2.4 Upload Completion

As records are processed, the uploaded rows will be cleared from the data grid, and a progress indicator will display the number of rows uploaded and the number of records in error (Figure 81). When all rows have been uploaded, both the data grid and the Error Messages list will be clear of all records.

Figure 81: Spreadsheet Upload Progress Indicator



4.3 Reports

The following subsections describe the reports available within Event Capture. Users can print, preview, or export the report data.

4.3.1 Reports Available to All Users

Twelve reports are available to all ECS users. ECMGR security key holders have access to additional reports as described in Section 4.3.2. Test patient data are excluded from reports (except test patient data entered for DSS Units CH103–109).

Before the User Starts

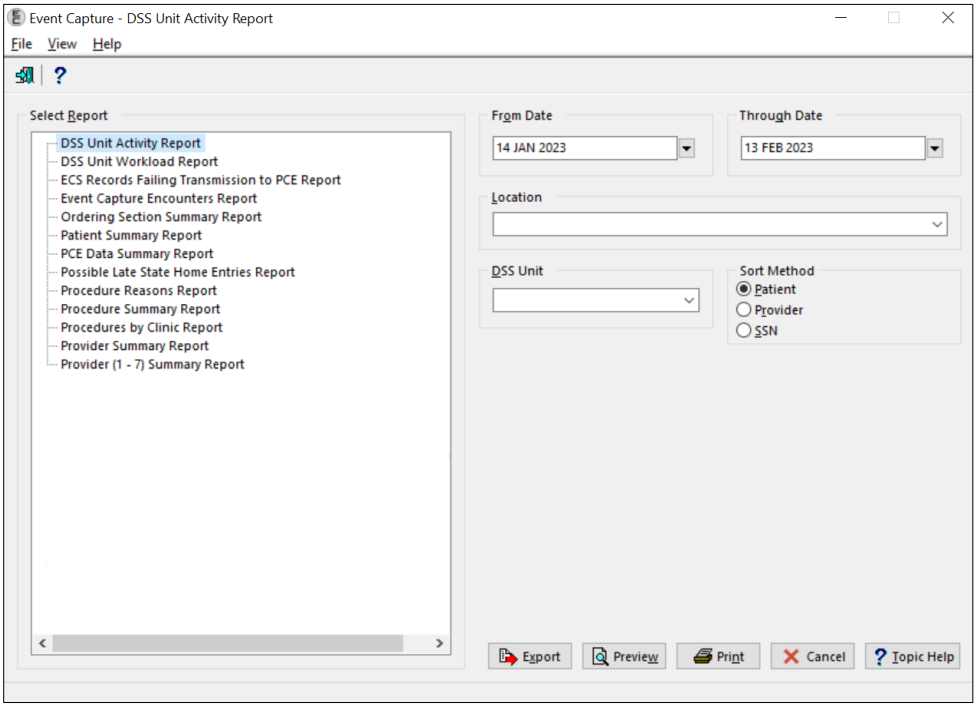
The following reports are available to all users (including ECMGR key holders):

1. DSS Unit Activity Report
2. DSS Unit Workload Report
3. ECS Records Failing Transmission to PCE Report
4. Event Capture Encounters Report
5. Ordering Section Summary Report
6. Patient Summary Report
7. PCE Data Summary Report
8. Possible Late State Home Entries Report
9. Procedure Reasons Report
10. Procedure Summary Report
11. Procedures by Clinic Report
12. Provider Summary Report
13. Provider (1–7) Summary Report

What the User Will See

- A list of reports will be available in the Select Report area (Figure 82).
- The DSS Unit Activity Report will be the default selection, and the corresponding selection criteria will display on the right side of the screen.

Figure 82: Reports Available to All Users



4.3.1.1 DSS Unit Activity Report

The DSS Unit Activity Report allows the user to print, display, or export all patients for the specified location(s) and DSS Unit(s), within a selected date range (Figure 83).

- The report can be sorted by patient, provider, or SSN.
- If more than one location has been set up, choose one or all locations.

Step 1. Enter a data range.

Step 2. Select one or all Location(s).

Step 3. Select one or all DSS Unit(s).

Step 4. Choose Sort Method (Patient, Provider, or SSN) for the report.

Note:

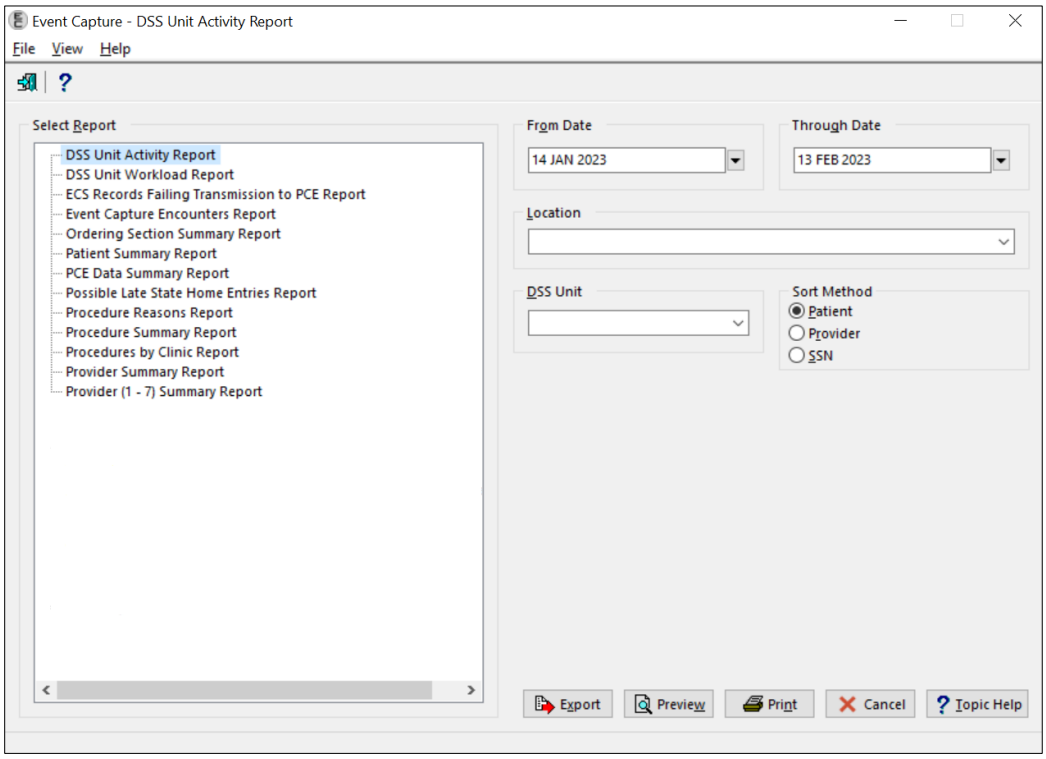
- Only the last four digits of the patient's SSN will appear on the preview of this report.
- The column order does not change with Sort Method when exported into Excel.

Step 5. Export, Preview, Print, or Cancel the report.

Note:

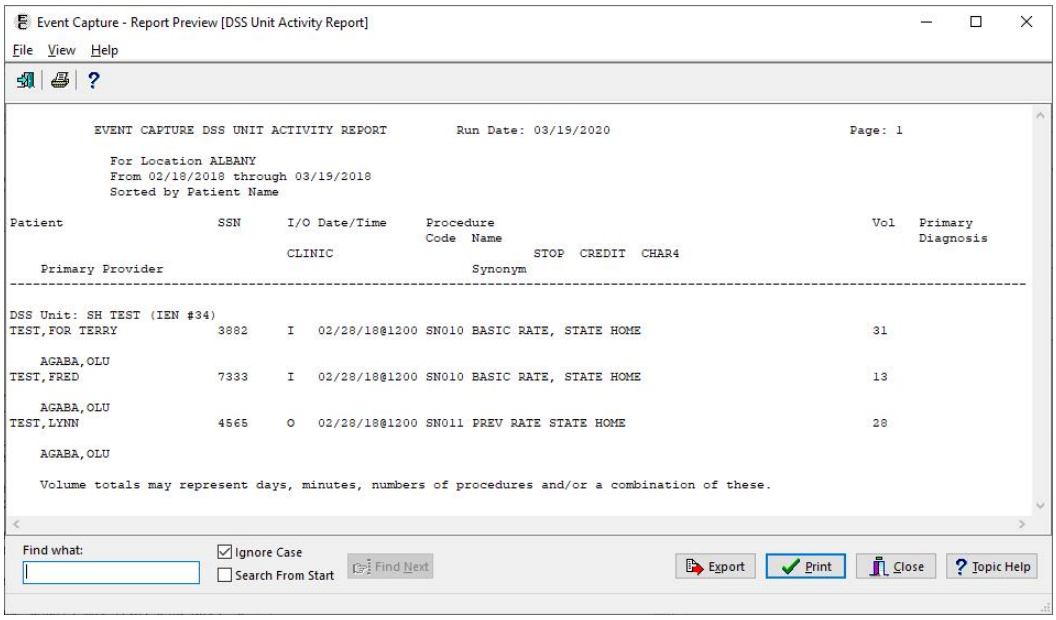
- When printing, the default printer is the device most recently used.

Figure 83: DSS Unit Activity Report Selection Criteria



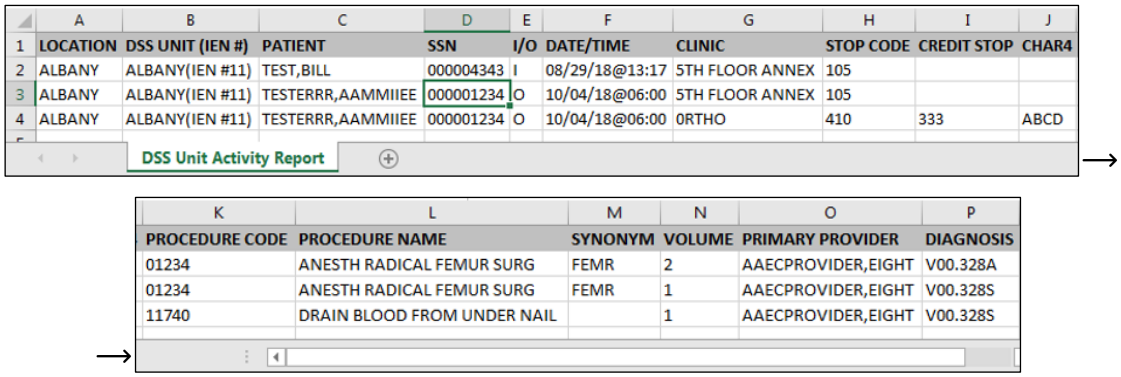
The Report Preview output (Figure 84) includes Patient Name, Last four digits of Patient SSN, Inpatient/Outpatient Indicator, Procedure Date and Time, Procedure Code, Procedure Name, Volume, Primary Diagnosis, Associated Clinic Name, Stop Code, Credit Stop, CHAR4 Code, Primary Provider, and Synonym. After previewing the report, the user will have the option to export, print or close the report.

Figure 84: Report Preview — DSS Unit Activity Report



The Export output produces the same information for the selected criteria, in Excel format (Figure 85).

Figure 85: Export — DSS Unit Activity Report



	A	B	C	D	E	F	G	H	I	J
1	LOCATION	DSS UNIT (IEN #)	PATIENT	SSN	I/O	DATE/TIME	CLINIC	STOP CODE	CREDIT STOP	CHAR4
2	ALBANY	ALBANY(IEN #11)	TEST,BILL	000004343	I	08/29/18@13:17	5TH FLOOR ANNEX	105		
3	ALBANY	ALBANY(IEN #11)	TESTERRR,AAMMIIEE	000001234	O	10/04/18@06:00	5TH FLOOR ANNEX	105		
4	ALBANY	ALBANY(IEN #11)	TESTERRR,AAMMIIEE	000001234	O	10/04/18@06:00	0RTHO	410	333	ABCD

DSS Unit Activity Report

K	L	M	N	O	P
PROCEDURE CODE	PROCEDURE NAME	SYNONYM	VOLUME	PRIMARY PROVIDER	DIAGNOSIS
01234	ANESTH RADICAL FEMUR SURG	FEMR	2	AAECPROVIDER,EIGHT	V00.328A
01234	ANESTH RADICAL FEMUR SURG	FEMR	1	AAECPROVIDER,EIGHT	V00.328S
11740	DRAIN BLOOD FROM UNDER NAIL		1	AAECPROVIDER,EIGHT	V00.328S

4.3.1.2 DSS Unit Workload Report

The DSS Unit Workload Report displays the number of procedures performed in each of the selected DSS Units. Refer to Figure 86 for an example of the report selection screen.

- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.

Step 1. Enter a date range.

Step 2. Select one or all location(s).

Step 3. Select one or all DSS Unit(s).

Step 4. Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.

Figure 86: DSS Unit Workload Report Selection Criteria

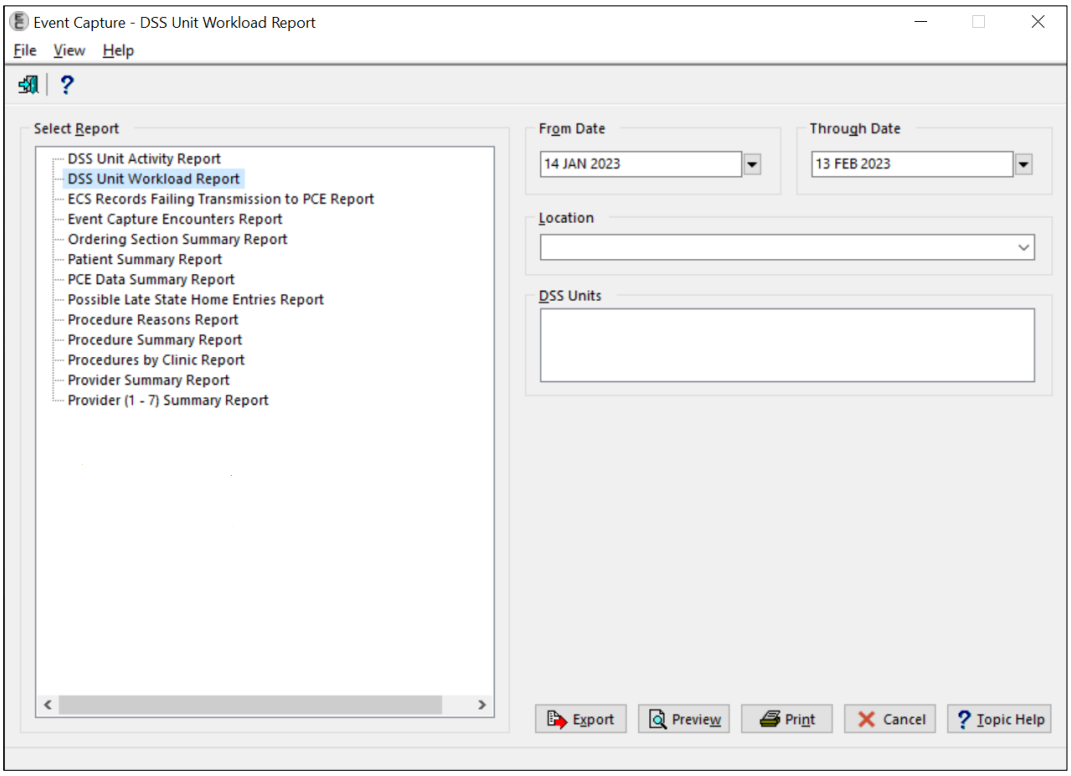
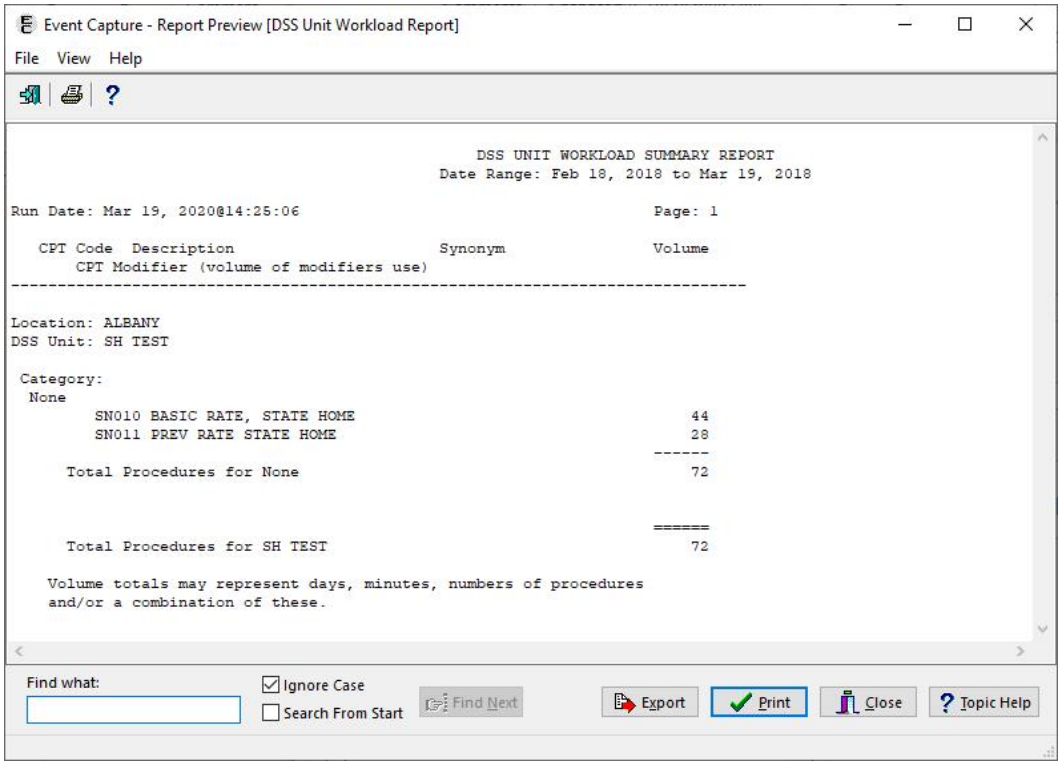


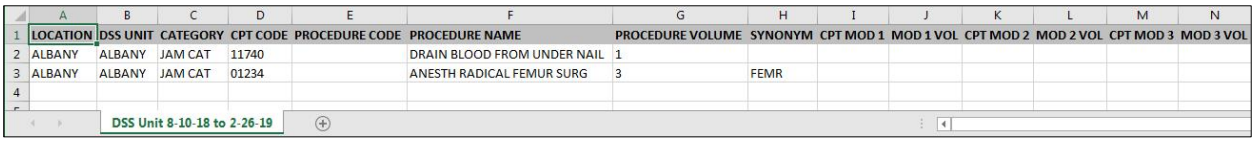
Figure 87 shows the output for the DSS Unit Workload Preview option. If the DSS Unit uses categories, it will list the procedures in each category and how many were performed. It will also list the total number of procedures for the unit, at the bottom of the unit listing. After previewing the report, the user will have the option to export, print or close the report.

Figure 87: Report Preview — DSS Unit Workload Report



The Export option produces the same information for the selected criteria in Excel format (Figure 88).

Figure 88: Export — DSS Unit Workload Report



LOCATION	DSS UNIT	CATEGORY	CPT CODE	PROCEDURE CODE	PROCEDURE NAME	PROCEDURE VOLUME	SYNONYM	CPT MOD 1	MOD 1 VOL	CPT MOD 2	MOD 2 VOL	CPT MOD 3	MOD 3 VOL
ALBANY	ALBANY	JAM CAT	11740		DRAIN BLOOD FROM UNDER NAIL	1							
ALBANY	ALBANY	JAM CAT	01234		ANESTH RADICAL FEMUR SURG	3	FEMR						

DSS Unit 8-10-18 to 2-26-19

4.3.1.3 ECS Records Failing Transmission to PCE Report

The ECS Records Failing Transmission to PCE Report provides a list of encounters and the reasons why records were not transmitted to PCE. Refer to Figure 89 for an example of the report selection screen.

- Locations, DSS Units, procedures, five-character EC National Codes (when applicable), and categories must be defined before using this option.

Step 1. Select the date range.

Step 2. Select One, Multiple or All Locations

Step 3. Select One, Multiple or All DSS Units

Step 4. Select to Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.

Figure 89: ECS Records Failing Transmission to PCE Report Selection Criteria

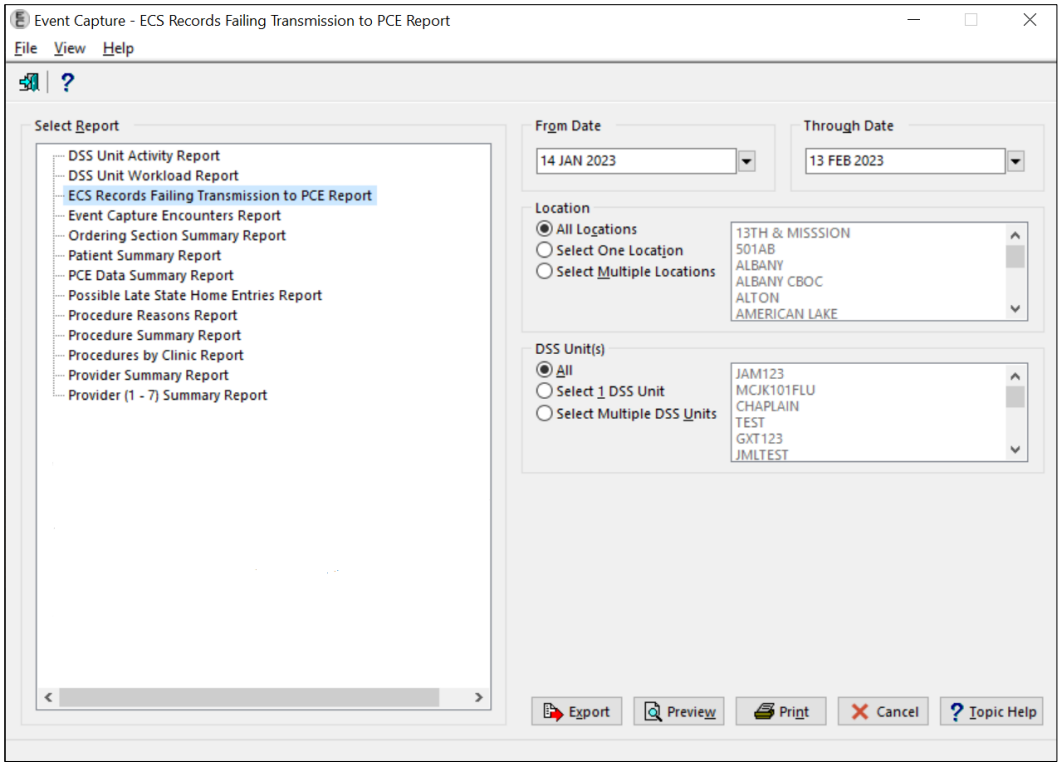
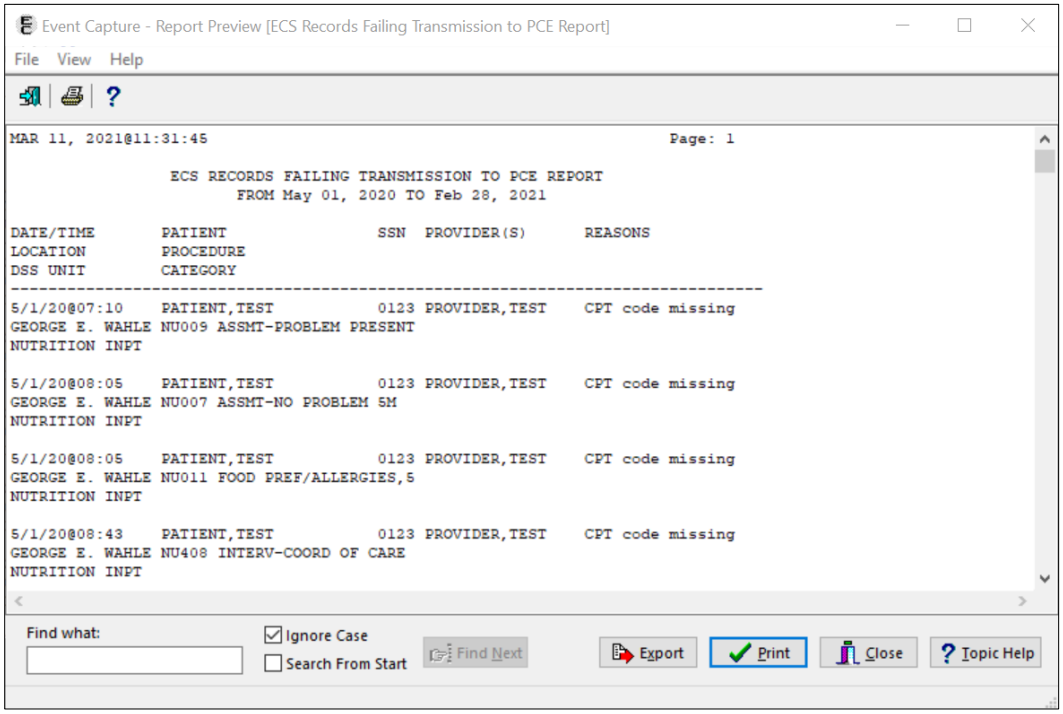


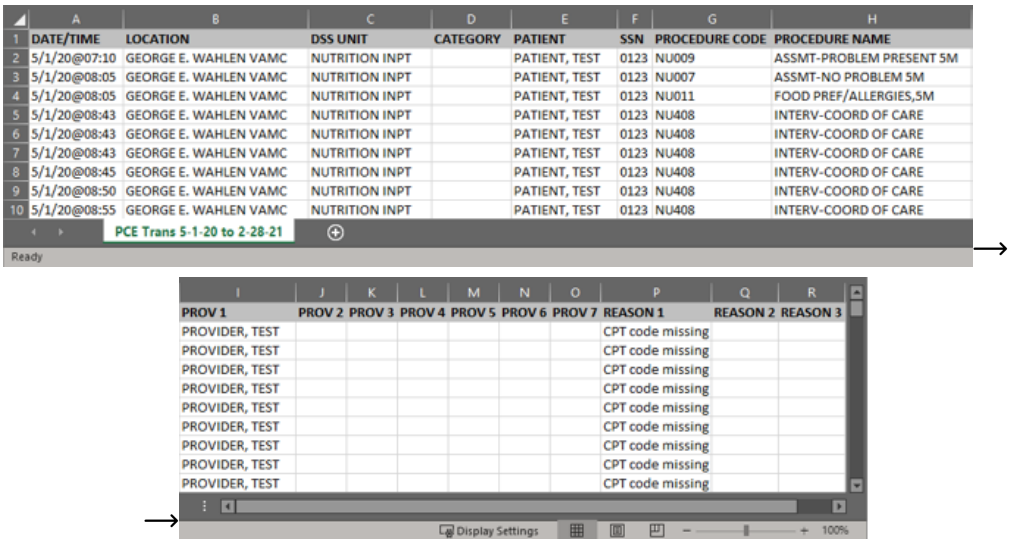
Figure 90 shows the output for the Preview option of the ECS Records Failing Transmission to PCS Report. The Procedure Date/Time, Location, DSS Unit, Patient, Procedure, Category, last four digits of the Patient's SSN, Provider(s) of care and Reasons for transmission failure are listed on the report. After previewing the report, the user has the option to export, print or close the report.

Figure 90: Report Preview — ECS Records Failing Transmission to PCE Report



The Export option produces the same information for the selected criteria in Excel format (Figure 91).

Figure 91: Export — ECS Records Failing Transmission to PCE Report



DATE/TIME	LOCATION	DSS UNIT	CATEGORY	PATIENT	SSN	PROCEDURE CODE	PROCEDURE NAME
5/1/20@07:10	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU009	ASSMT-PROBLEM PRESENT 5M
5/1/20@08:05	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU007	ASSMT-NO PROBLEM 5M
5/1/20@08:05	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU011	FOOD PREF/ALLERGIES,5M
5/1/20@08:43	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU408	INTERV-COORD OF CARE
5/1/20@08:43	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU408	INTERV-COORD OF CARE
5/1/20@08:43	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU408	INTERV-COORD OF CARE
5/1/20@08:45	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU408	INTERV-COORD OF CARE
5/1/20@08:50	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU408	INTERV-COORD OF CARE
5/1/20@08:55	GEORGE E. WAHLEN VAMC	NUTRITION INPT		PATIENT, TEST	0123	NU408	INTERV-COORD OF CARE

PROV 1	PROV 2	PROV 3	PROV 4	PROV 5	PROV 6	PROV 7	REASON 1	REASON 2	REASON 3
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		
PROVIDER, TEST							CPT code missing		

4.3.1.4 Event Capture Encounters Report

This option allows you to print/display/export Event Capture encounter data within a specified date range for selected locations and DSS units. Refer to Figure 92 to view the report selection screen.

- The report displays and counts the sum of occurrences by patient and DSS Unit during a selected date range. It also enables sorting by patient, provider, or clinic.
  - Sorting by Patient (Figure 94) shows the sum of occurrences for the Patient across the date range that is selected.
  - Sorting by Provider (Figure 95) shows the sum of occurrences for the Provider across the date range that is selected.
  - Sorting by Clinic (Figure 96) shows the sum of occurrences for the Clinic across the date range that is selected.
- The report includes the fields Patient Name, SSN (last 4 digits), Inpatient or Outpatient (I/O), Date/Time, Provider #1, DSS Unit and Volume.

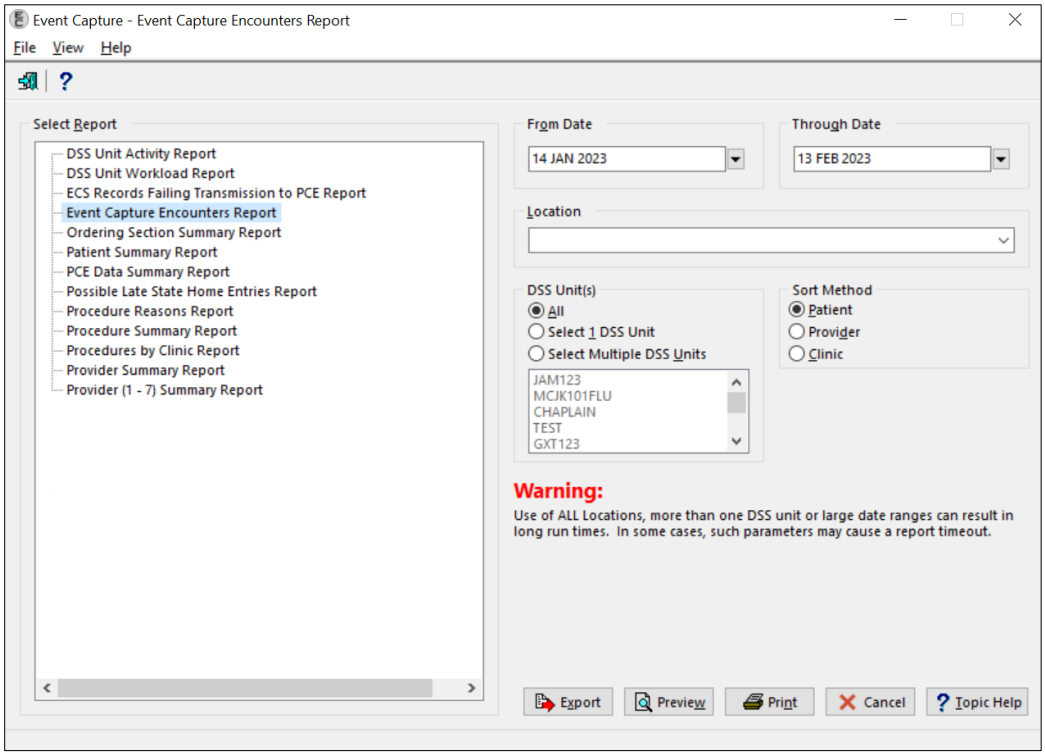
Step 1. Select a date range.

Step 2. Select one or all Locations.

Step 3. Select one, all, or multiple DSS Unit(s).

Step 4. Select Sort Method (Patient, Provider or Clinic).

Figure 92: Event Capture Encounters Report Selection Criteria



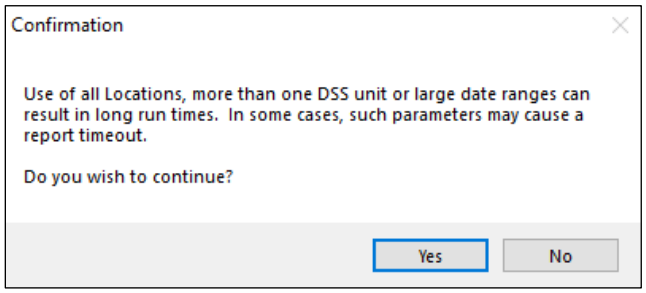
Step 5. Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.
- Only the last four digits of the patient's SSN will appear on the preview of this report.

A report timeout warning and message dialog are displayed when All Locations, All DSS units, or large date ranges are selected (Figure 93).

Figure 93: Event Capture Encounters Report Timeout Warning



The preview output includes the Patient Name, SSN (last 4 digits), Inpatient or Outpatient (I/O), Date/Time, Provider #1, DSS Unit, Volume, Clinic, Stop Code, Credit Stop Code, CHAR4 Code and MCA Labor Code.

The appearance of the report will vary slightly depending on the sort method selected (see Figure 94, Figure 95 and Figure 96).

Figure 94: Report Preview — Event Capture Encounters Report Sorted by Patient

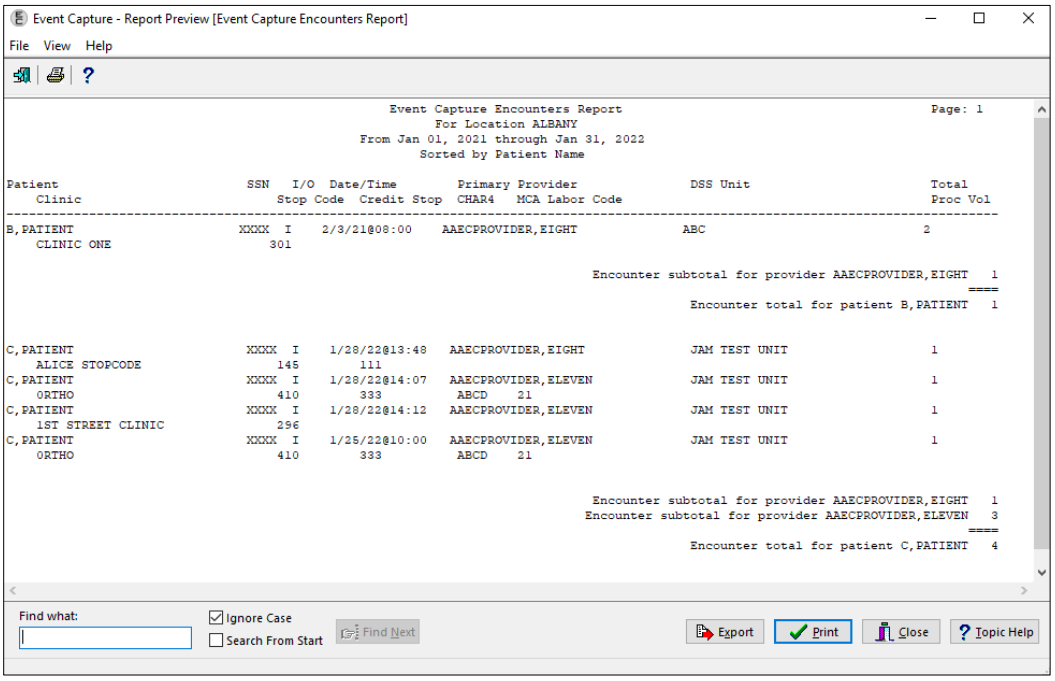
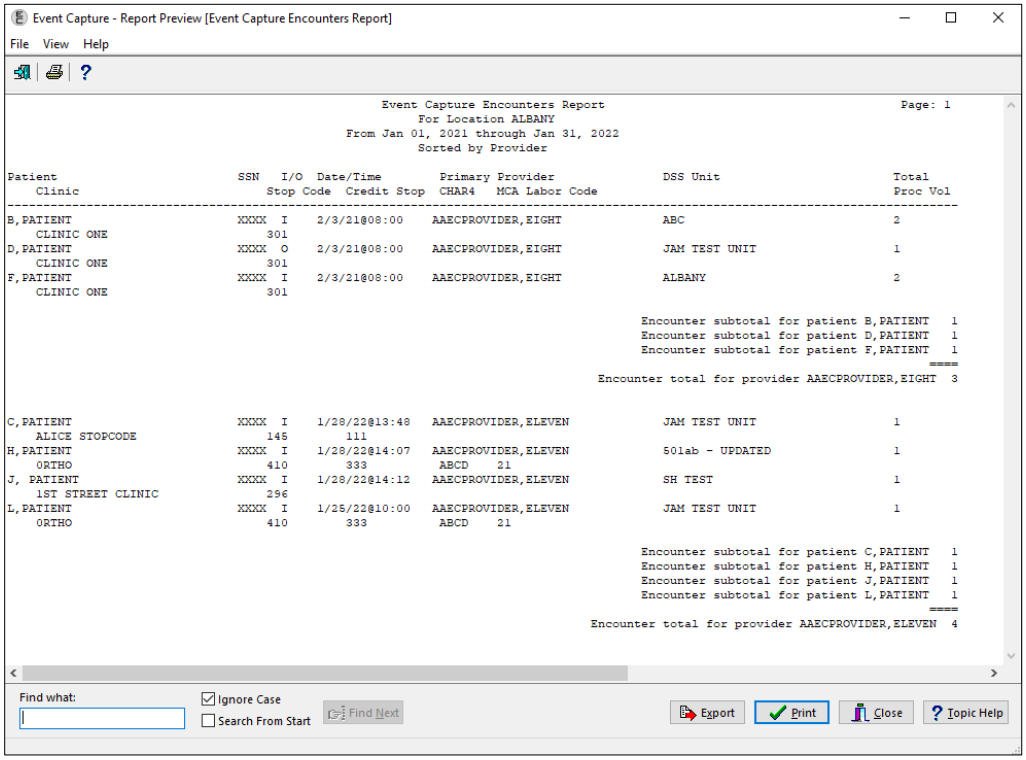
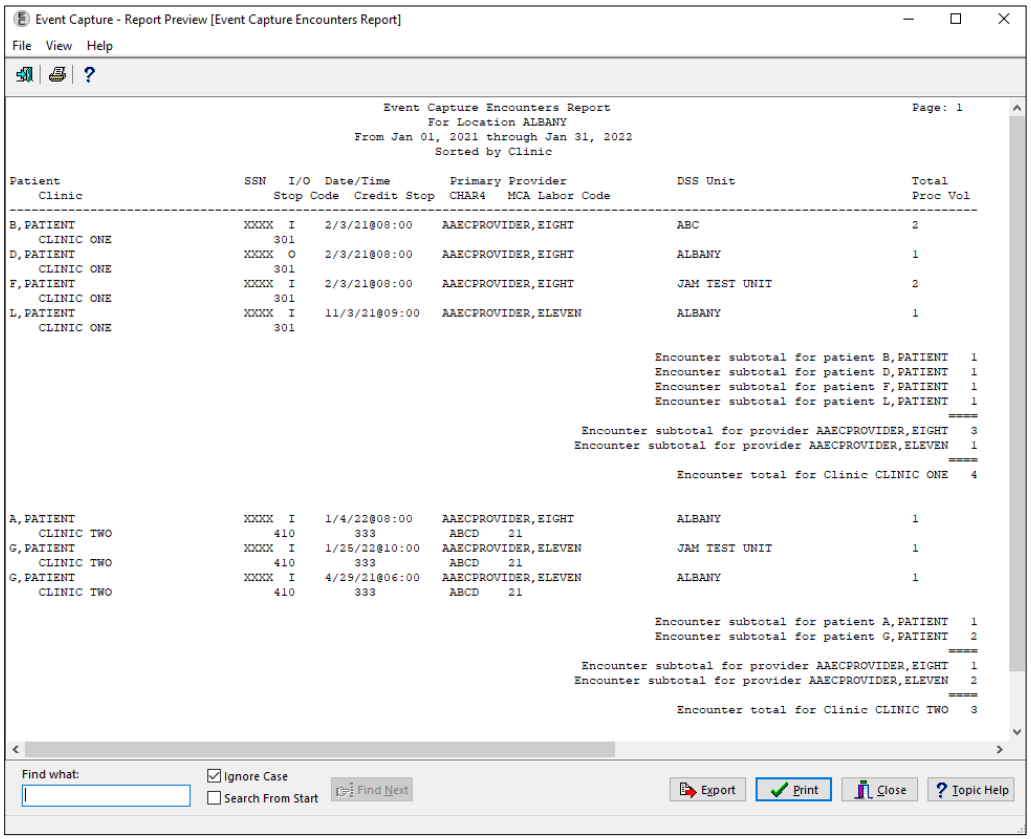


Figure 95: Report Preview — Event Capture Encounters Report Sorted by Provider



```
Event Capture - Report Preview [Event Capture Encounters Report]
File  View  Help

                                   Event Capture Encounters Report                                   Page: 1
                                         For Location ALBANY
                                  From Jan 01, 2021 through Jan 31, 2022
                                         Sorted by Provider

Patient                        SSN   I/O  Date/Time        Primary Provider              DSS Unit                        Total
    Clinic                         Stop Code  Credit Stop  CHAR4   MCA Labor Code                                        Proc Vol
-----------------------------------------------------------------------------------------------------------------------------------
B,PATIENT                      XXXX  I    2/3/21@08:00    AAECPROVIDER,EIGHT            ABC                             2
    CLINIC ONE                     301
D,PATIENT                      XXXX  O    2/3/21@08:00    AAECPROVIDER,EIGHT            JAM TEST UNIT                   1
    CLINIC ONE                     301
F,PATIENT                      XXXX  I    2/3/21@08:00    AAECPROVIDER,EIGHT            ALBANY                          2
    CLINIC ONE                     301

                                                                                   Encounter subtotal for patient B,PATIENT   1
                                                                                   Encounter subtotal for patient D,PATIENT   1
                                                                                   Encounter subtotal for patient F,PATIENT   1
                                                                                                                          ====
                                                                             Encounter total for provider AAECPROVIDER,EIGHT  3

C,PATIENT                      XXXX  I    1/28/22@13:48   AAECPROVIDER,ELEVEN            JAM TEST UNIT                   1
    ALICE STOPCODE                 145        111
H,PATIENT                      XXXX  I    1/28/22@14:07   AAECPROVIDER,ELEVEN            501ab - UPDATED                 1
    0RTHO                          410        333          ABCD    21
J, PATIENT                     XXXX  I    1/28/22@14:12   AAECPROVIDER,ELEVEN            SH TEST                         1
    1ST STREET CLINIC              296
L,PATIENT                      XXXX  I    1/25/22@10:00   AAECPROVIDER,ELEVEN            JAM TEST UNIT                   1
    0RTHO                          410        333          ABCD    21

                                                                                   Encounter subtotal for patient C,PATIENT   1
                                                                                   Encounter subtotal for patient H,PATIENT   1
                                                                                   Encounter subtotal for patient J,PATIENT   1
                                                                                   Encounter subtotal for patient L,PATIENT   1
                                                                                                                          ====
                                                                            Encounter total for provider AAECPROVIDER,ELEVEN  4

Find what:                 [✓] Ignore Case      Find Next      Export   Print   Close   ? Topic Help
                           [ ] Search From Start
```

Figure 96: Report Preview — Event Capture Encounters Report Sorted by Clinic



```
Event Capture - Report Preview [Event Capture Encounters Report]
File  View  Help

                                   Event Capture Encounters Report                                   Page: 1
                                         For Location ALBANY
                                  From Jan 01, 2021 through Jan 31, 2022
                                          Sorted by Clinic

Patient                        SSN   I/O  Date/Time        Primary Provider              DSS Unit                        Total
    Clinic                         Stop Code  Credit Stop  CHAR4   MCA Labor Code                                        Proc Vol
-----------------------------------------------------------------------------------------------------------------------------------
B,PATIENT                      XXXX  I    2/3/21@08:00    AAECPROVIDER,EIGHT            ABC                             2
    CLINIC ONE                     301
D,PATIENT                      XXXX  O    2/3/21@08:00    AAECPROVIDER,EIGHT            ALBANY                          1
    CLINIC ONE                     301
F,PATIENT                      XXXX  I    2/3/21@08:00    AAECPROVIDER,EIGHT            JAM TEST UNIT                   2
    CLINIC ONE                     301
L,PATIENT                      XXXX  I    11/3/21@09:00   AAECPROVIDER,ELEVEN           ALBANY                          1
    CLINIC ONE                     301

                                                                                   Encounter subtotal for patient B,PATIENT   1
                                                                                   Encounter subtotal for patient D,PATIENT   1
                                                                                   Encounter subtotal for patient F,PATIENT   1
                                                                                   Encounter subtotal for patient L,PATIENT   1
                                                                                                                          ====
                                                                             Encounter subtotal for provider AAECPROVIDER,EIGHT  3
                                                                            Encounter subtotal for provider AAECPROVIDER,ELEVEN  1
                                                                                                                          ====
                                                                                   Encounter total for Clinic CLINIC ONE   4

A,PATIENT                      XXXX  I    1/4/22@08:00    AAECPROVIDER,EIGHT            ALBANY                          1
    CLINIC TWO                     410        333          ABCD    21
G,PATIENT                      XXXX  I    1/25/22@10:00   AAECPROVIDER,ELEVEN           JAM TEST UNIT                   1
    CLINIC TWO                     410        333          ABCD    21
G,PATIENT                      XXXX  I    4/29/21@06:00   AAECPROVIDER,ELEVEN           ALBANY                          1
    CLINIC TWO                     410        333          ABCD    21

                                                                                   Encounter subtotal for patient A,PATIENT   1
                                                                                   Encounter subtotal for patient G,PATIENT   2
                                                                                                                          ====
                                                                             Encounter subtotal for provider AAECPROVIDER,EIGHT  1
                                                                            Encounter subtotal for provider AAECPROVIDER,ELEVEN  2
                                                                                                                          ====
                                                                                   Encounter total for Clinic CLINIC TWO   3

Find what:                 [✓] Ignore Case      Find Next      Export   Print   Close   ? Topic Help
                           [ ] Search From Start
```

Note:

- The Export option produces the same information for the selected criteria in Excel format (Figure 97).
- The column order does not change with Sort Method when exported into Excel

Figure 97: Export — Event Capture Encounters Report

LOCATION	PATIENT	SSN	I/O	DATE/TIME	PRIMARY PROVIDER	DSS UNIT	TOTAL PROCEDURE VOLUME	CLINIC	STOP CODE	CREDIT STOP CODE	CHAR4 CODE	MCA LABOR CODE
ALBANY	A,PATIENT	XXXXXXXXX	I	1/4/22@8:00	AAECPROVIDER,EIGHT	ALBANY	1	CLINIC TWO	410	333	ABCD	
ALBANY	B,PATIENT	XXXXXXXXX	I	2/3/21@08:00	AAECPROVIDER,EIGHT	ABC	2	CLINIC ONE	301			
ALBANY	C,PATIENT	XXXXXXXXX	I	1/20/22@13:40	AAECPROVIDER,ELEVEN	JAM TEST UNIT	1	ALICE STOPCODE	145	111		
ALBANY	D,PATIENT	XXXXXXXXX	O	2/3/21@08:00	AAECPROVIDER,EIGHT	JAM TEST UNIT	1	CLINIC ONE	301			
ALBANY	F,PATIENT	XXXXXXXXX	I	2/3/21@8:00	AAECPROVIDER,EIGHT	JAM TEST UNIT	1	CLINIC ONE	301			
ALBANY	G,PATIENT	XXXXXXXXX	I	1/26/22@10:00	AAECPROVIDER,ELEVEN	JAM TEST UNIT	1	CLINIC TWO	410	333	ABCD	21

Encounter 1-1-21 to 1-31-22

Ready Display Settings 90%

4.3.1.5 Ordering Section Summary Report

The Ordering Section Summary Report allows the user to print/display procedures ordered within a specified date range for a selected ordering section. Refer to Figure 98 for an example of the report selection screen.

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.
- After previewing the report, the user will have the option to export, print or close the report.

Step 1. Enter a date range.

Step 2. Select an Ordering Section.

Step 3. Select a specific or all Location(s).

Step 4. Select one, multiple, or all DSS Unit(s).

Step 5. Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.

Figure 98: Ordering Section Summary Report Selection Criteria

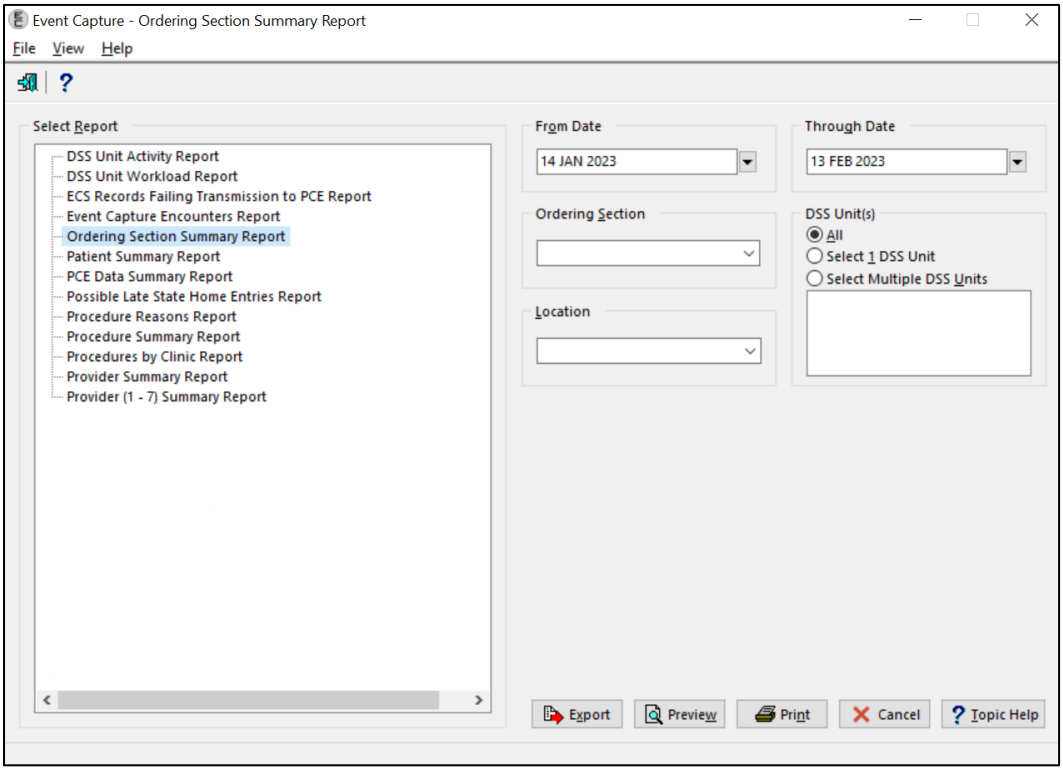
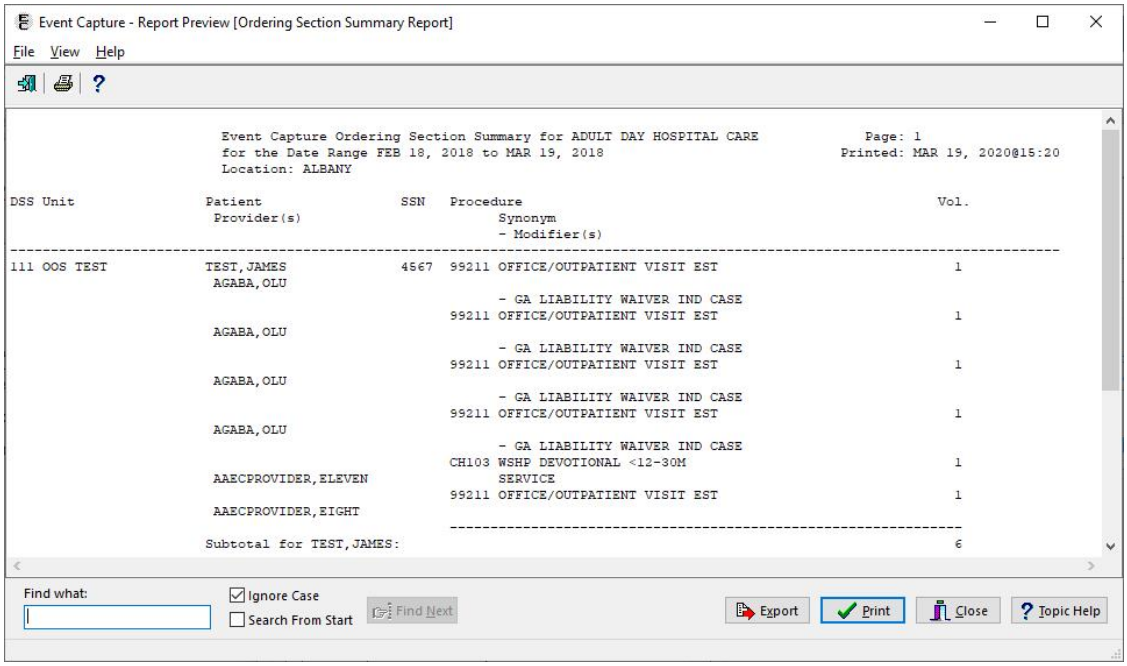


Figure 99 is an image of the Ordering Section Summary Report from Preview.

Figure 99: Report Preview — Ordering Section Summary Report



The Export option produces the information for the selected criteria in Excel format (Figure 100).

Figure 100: Export — Ordering Section Summary Report

	A	B	C	D	E	F	G	H	I	J	K	L
1	ORDERING SECTION	LOCATION	DSS UNIT	PATIENT	SSN	CPT CODE	PROCEDURE CODE	PROCEDURE NAME (DESCRIPTION)	SYNONYM	VOLUME	CPT MOD #1	CPT MOD #2
2	ACUTE PSYCHIATRY (<45 DAYS)	ALBANY	29 TEST	TEST,BILL	XXXX	01234		ANESTH RADICAL FEMUR SURG	FEMUR SURG	1		
3												

Order Summ 1-28-19 to 2-27-19

→

M	N	O	P	Q	R	S	T
CPT MOD #3	PROVIDER #1	PROVIDER #2	PROVIDER #3	PROVIDER #4	PROVIDER #5	PROVIDER #6	PROVIDER #7
	AAECPROVIDER,ELEVEN						

→

4.3.1.6 Patient Summary Report

The Patient Summary Report allows the user to print/display procedure-related data within a specified date range for a selected patient. Refer to Figure 101 to view the report selection screen.

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.
- The user can choose to include Procedure Reasons (EVENT CAPTURE PATIENT file (#721)) on the report. Up to three reasons will be included.
- The "Display Reasons on this report" option will clear when the user selects another report or upon exiting the screen.
- After previewing the report, the user will have the option to export, print or close the report (Figure 102).

Step 1. Enter a date range.

Step 2. Use the Patient Identifier field to select a patient.

- Enter one of the following:
  - Patient Name (whole or partial, last name first)
  - Social Security Number
  - Last four digits of the Patient Social Security Number
  - First character of Last Name plus the last four digits of the SSN with no spaces
- Press <**Enter**> on the keyboard or click the **Binoculars** (Search) button.
- Choose from the list of patients displayed.

Step 3. Click the Display Reasons on this report checkbox to include Procedure Reasons in the report (Figure 104).

Step 4. Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.

Figure 101: Patient Summary Report (without Reasons) — Selection Criteria

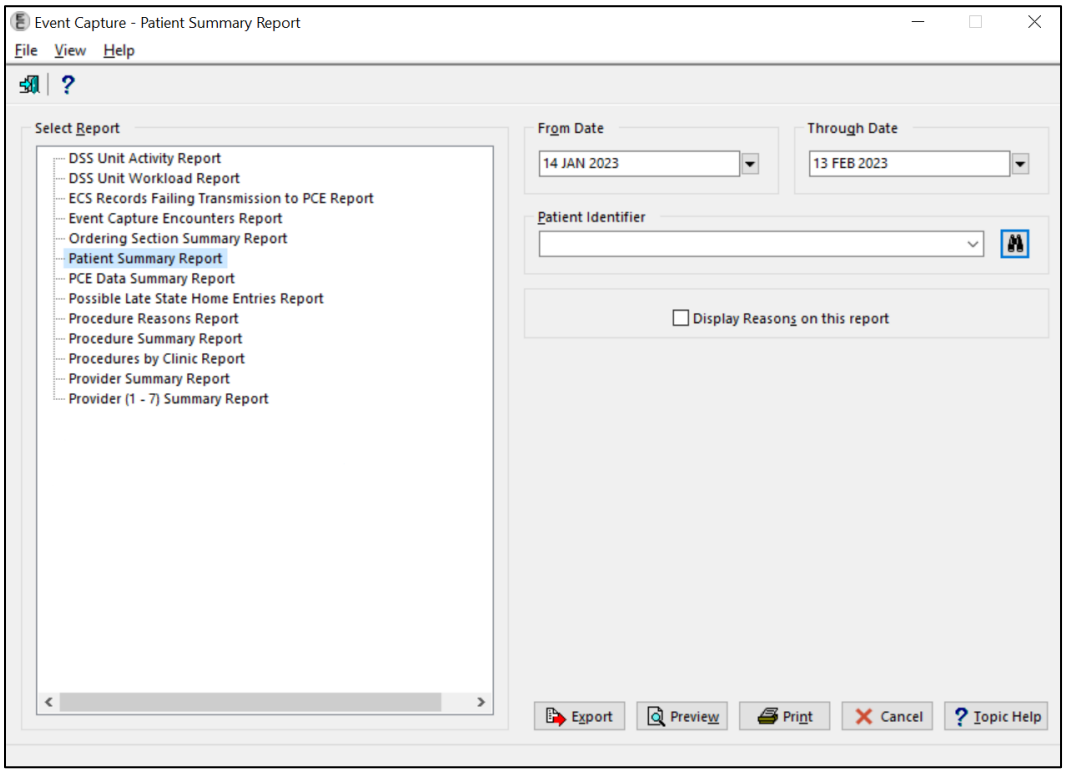
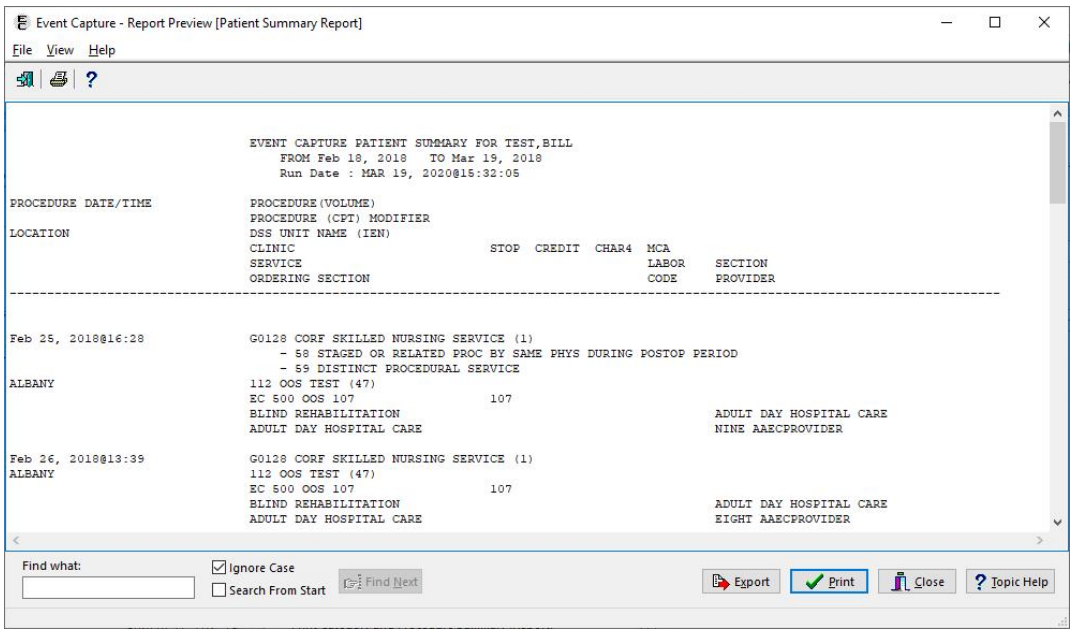


Figure 102: Patient Summary Report (without Reasons) — Report Preview



The Export option produces the information for the selected criteria in Excel format (Figure 103).

Figure 103: Patient Summary Report (without Reasons) — Export

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	PATIENT NAME	SSN	PROCEDURE DATE/TIME	LOCATION	DSS UNIT	DSS UNIT NAME	CLINIC	STOP CODE	CREDIT STOP	CHAR4	MCA LABOR CODE	CPT CODE	PROCEDURE CODE
2	TEST,BILL	XXXX	Feb 10, 2019@06:00	ALBANY	41	29 TEST	ORTHO	410	333	ABCD	21	01234	
3													

Patient Summary Report

→

→

N	O	P	Q	R	S
PROCEDURE NAME	VOLUME	SERVICE	SECTION	ORDERING SECTION	PROVIDER
ANESTH RADICAL FEMUR SURG [FEMUR SURG]	1	A&M MGMT	ACUTE PSYCHIATRY (<45 DAYS)	ACUTE PSYCHIATRY (<45 DAYS)	ELEVEN AAECPROVIDER

Figure 105 and Figure 106 show examples of this report when the "Display Reasons on this report" option is selected on the report criteria screen (Figure 104).

Figure 104: Patient Summary Report (with Reasons) — Selection Criteria

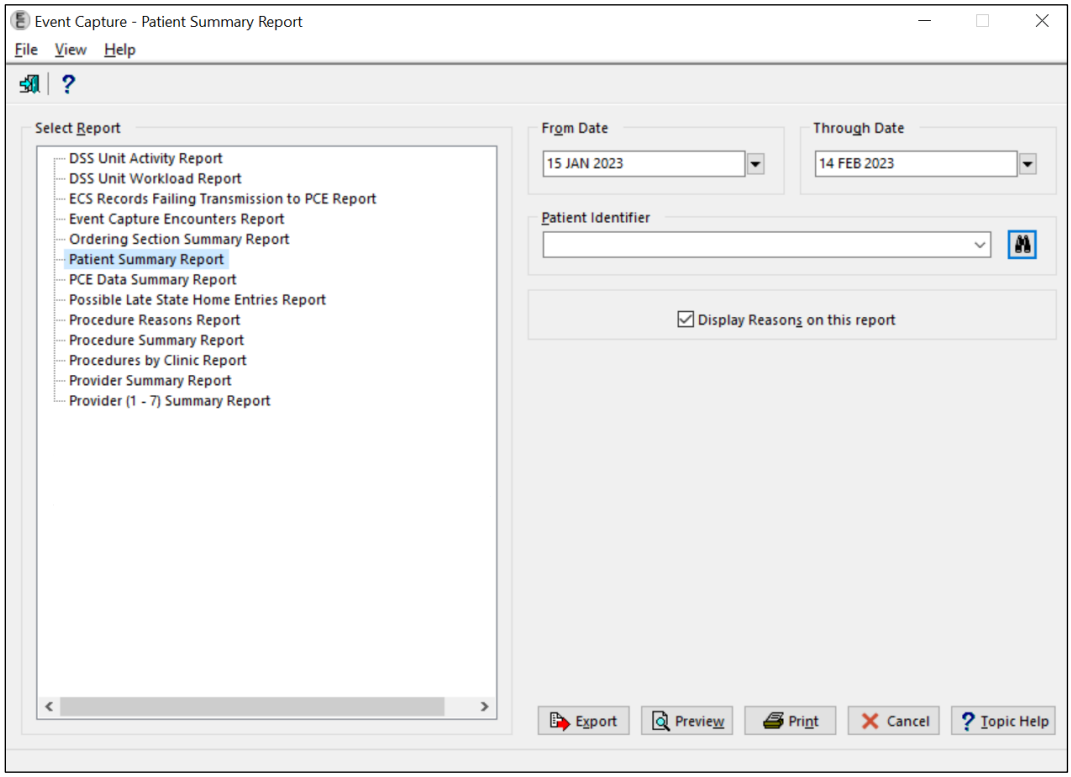


Figure 105: Patient Summary Report (with Reasons) — Report Preview

Event Capture - Report Preview [Patient Summary Report]

File View Help

```
                                EVENT CAPTURE PATIENT SUMMARY FOR TEST,BILL
                                    FROM Feb 18, 2018   TO Mar 19, 2018
                                    Run Date : MAR 19, 2020@15:33:37

PROCEDURE DATE/TIME             PROCEDURE(VOLUME)
                                PROCEDURE (CPT) MODIFIER
LOCATION                        DSS UNIT NAME (IEN)
                                CLINIC                          STOP  CREDIT  CHAR4  MCA
                                SERVICE                                              LABOR    SECTION
PROCEDURE REASON(S)             ORDERING SECTION                                     CODE     PROVIDER
-------------------------------------------------------------------------------------------------------------


Feb 25, 2018@16:28              G0128 CORF SKILLED NURSING SERVICE (1)
                                    - 58 STAGED OR RELATED PROC BY SAME PHYS DURING POSTOP PERIOD
                                    - 59 DISTINCT PROCEDURAL SERVICE
ALBANY                          112 OOS TEST (47)
                                EC 500 OOS 107                  107
                                BLIND REHABILITATION                                         ADULT DAY HOSPITAL CARE
CARPE DIEM                      ADULT DAY HOSPITAL CARE                                      NINE AAECPROVIDER

Feb 26, 2018@13:39              G0128 CORF SKILLED NURSING SERVICE (1)
ALBANY                          112 OOS TEST (47)
                                EC 500 OOS 107                  107
                                BLIND REHABILITATION                                         ADULT DAY HOSPITAL CARE
REASON NOT DEFINED              ADULT DAY HOSPITAL CARE                                      EIGHT AAECPROVIDER
```

Find what: Ignore Case Search From Start Find Next Export Print Close Topic Help

The Export option produces the information for the selected criteria in Excel format (Figure 106).

Figure 106: Patient Summary Report (with Reasons) — Export

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	PATIENT NAME	SSN	PROCEDURE DATE/TIME	LOCATION	DSS UNIT IEN	DSS UNIT NAME	CLINIC	STOP CODE	CREDIT STOP	CHAR4	MCA LABOR CODE	CPT CODE	PROCEDURE CODE
2	TEST,BILL	XXXX	Feb 10, 2019@(	ALBANY	41	29 TEST	0RTHO	410	333	ABCD	21	01234	
3													

Patient Summary Report

→

	N	O	P	Q	R	S	T	U	V
	PROCEDURE NAME	VOLUME	REASON #1	REASON #2	REASON #3	SERVICE	SECTION	ORDERING SECTION	PROVIDER
	ANESTH RAD	1	JUST BECAUSE			A&M MGMT	ACUTE PS'	ACUTE PSY(	ELEVEN AAECPROVIDER

→

4.3.1.7 PCE Data Summary Report

The PCE Data Summary Report allows the user to print/display procedure data that was sent to the PCE software for a selected patient within a specified date range. Refer to Figure 107 to view the report selection screen.

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers, diagnosis codes and their associated descriptions are reflective of the date the event occurred.

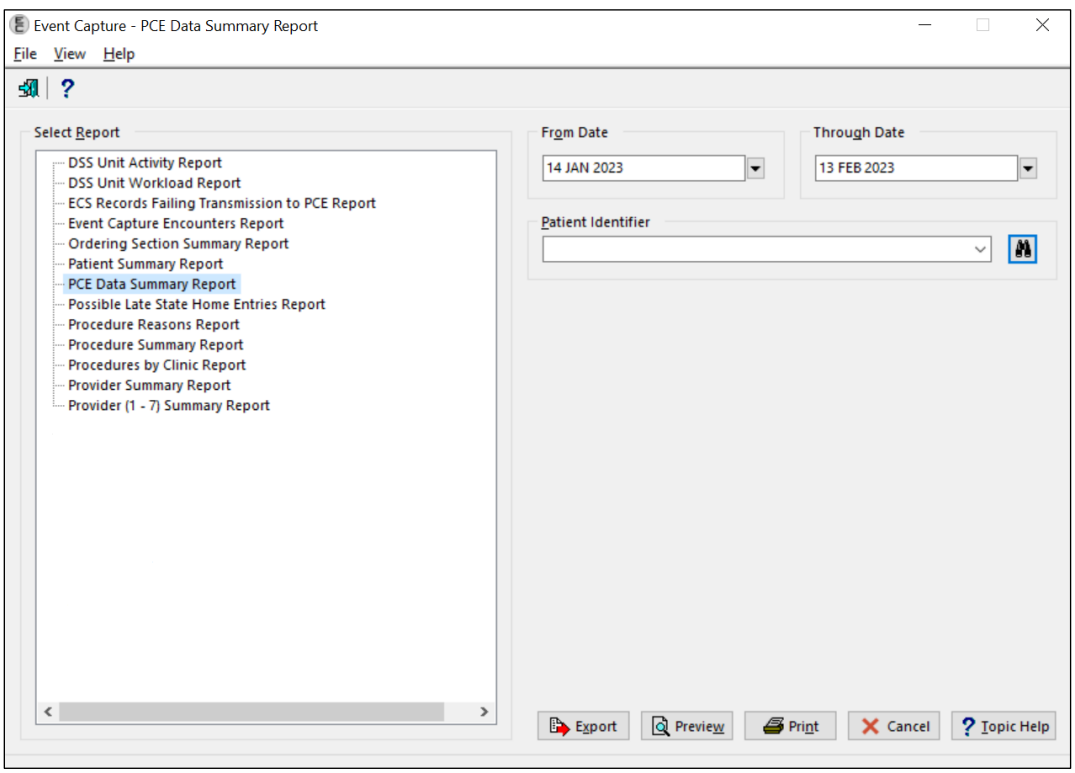
Step 1. Enter a date range.

Step 2. Use the Patient Identifier field to select a patient.

- Enter one of the following:
  - Patient Name (whole or partial, last name first)
  - Social Security Number
  - Last four digits of the Patient Social Security Number
  - First character of Last Name plus the last four digits of the SSN with no spaces
- Press <**Enter**> on the keyboard or click the **Binoculars** (Search) button.
- Choose from the list of patients displayed.

Step 3. Export, Preview, Print, or Cancel the report.

Figure 107: PCE Data Summary Report Selection Criteria

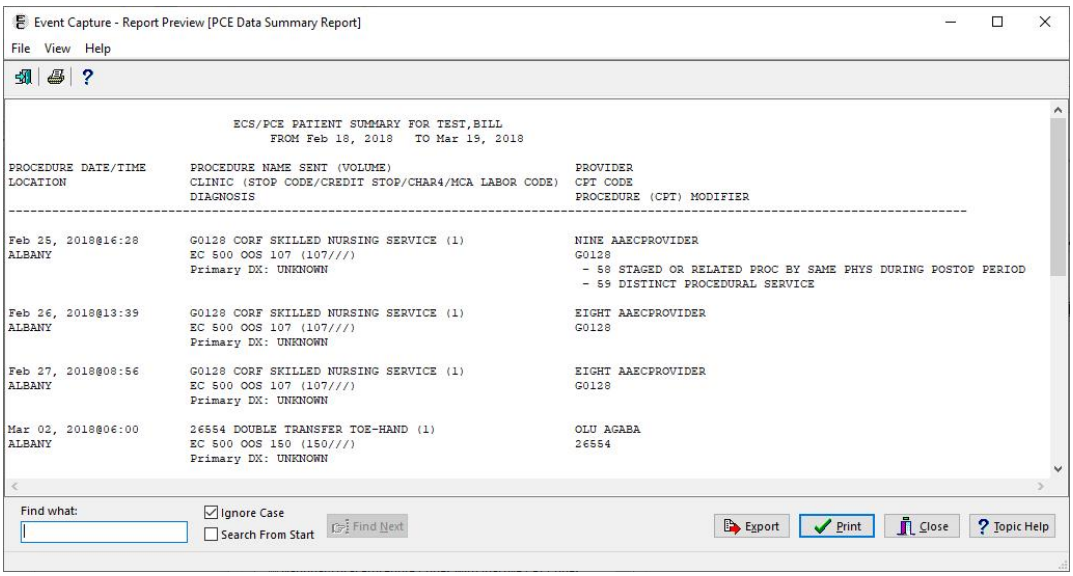


The Preview option output includes Patient Name, Date Range, Date/Time of procedure, Procedure Name (as sent to PCE), Volume, Provider, Location, Associated Clinic, Stop Code, Credit Stop Code, CHAR4 Code, MCA Labor Code, CPT Code, ICD-10 code and Modifier(s) (Figure 108). After previewing the report, the user has the option to export, print or close the report.

Note:

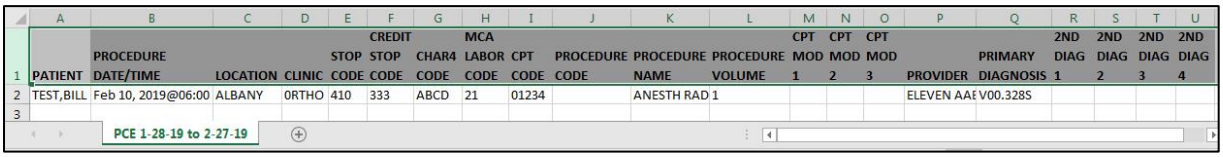
- When printing, the default printer is the device most recently used.

Figure 108: Report Preview — PCE Data Summary Report



The Export option produces the information for the selected criteria in Excel format (Figure 109).

Figure 109: Export — PCE Data Summary Report



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	PATIENT	PROCEDURE DATE/TIME	LOCATION	CLINIC	STOP CODE	CREDIT STOP CODE	CHAR4 CODE	MCA LABOR CODE	CPT CODE	PROCEDURE CODE	PROCEDURE NAME	PROCEDURE VOLUME	CPT MOD 1	CPT MOD 2	CPT MOD 3	PROVIDER	PRIMARY DIAGNOSIS	2ND DIAG 1	2ND DIAG 2	2ND DIAG 3	2ND DIAG 4
2	TEST,BILL	Feb 10, 2019@06:00	ALBANY	ORTHO	410	333	ABCD	21	01234		ANESTH RAD	1				ELEVEN AAE	V00.328S				
3																					

PCE 1-28-19 to 2-27-19

4.3.1.8 Possible Late State Home Entries Report

The Possible Late State Home Entries Report lists all possible late State Veterans Home entries for the selected date range. These are State Veterans Home records that were entered for prior months that could be included in a previously completed ECS Extract. Refer to Figure 110 for an example of the report selection screen.

Note:

- Late State Home entry reporting is limited to the current fiscal year. Late State Home records for previous fiscal years are not processed and will not be included on this report.

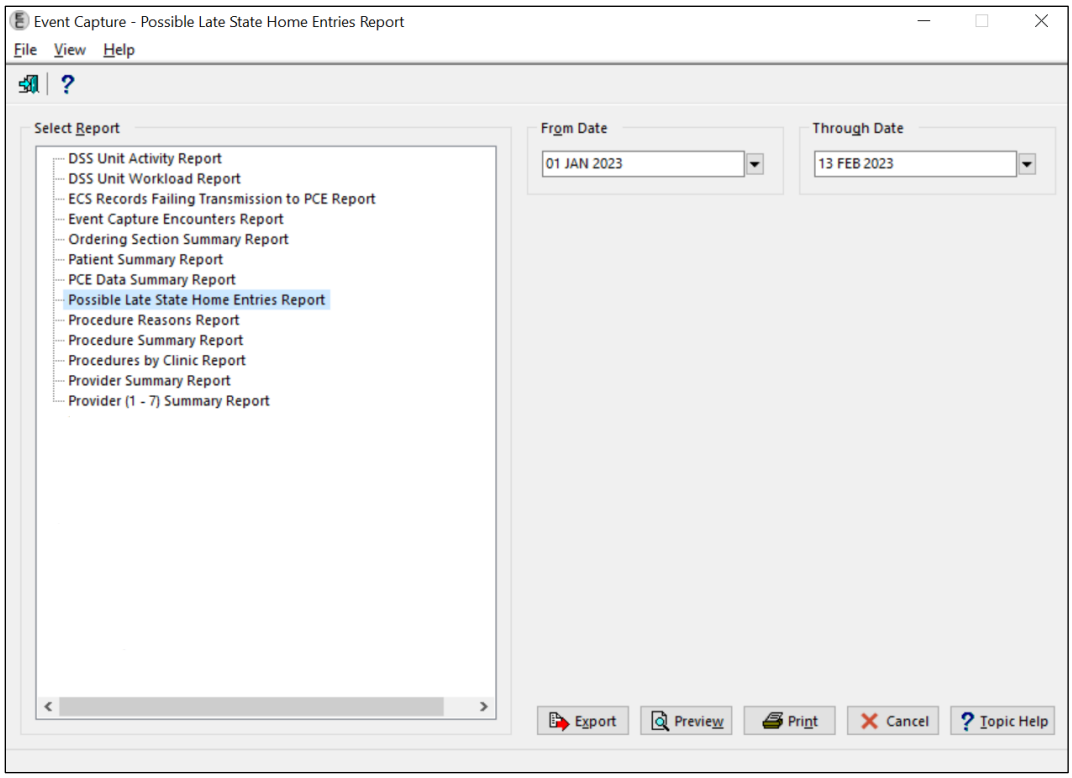
Step 1. Select a date range.

Step 2. Export, Preview, Print, or Cancel the report.

Note:

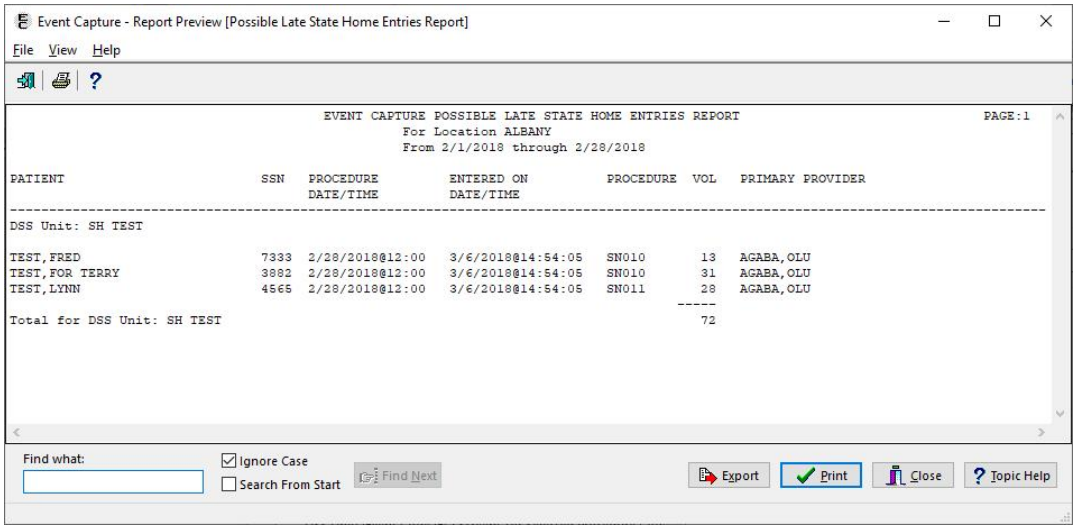
- When printing, the default printer is the device most recently used.

Figure 110: Possible Late State Home Entries Report Selection Criteria



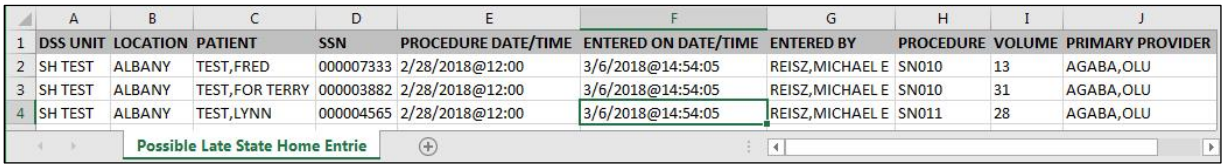
The preview output includes the DSS Unit, Location, Patient Name, last 4 digits of SSN (full on export), Procedure Date/Time, Entered Date/Time, Entered By (export only), Procedure, Volume and Primary Provider. After previewing the report, the user will have the option to export, print or close the report.

Figure 111: Report Preview — Possible Late State Home Entries Report



The Export option produces the information for the selected criteria in Excel format (Figure 112).

Figure 112: Export — Possible Late State Home Entries Report



	A	B	C	D	E	F	G	H	I	J
1	DSS UNIT	LOCATION	PATIENT	SSN	PROCEDURE DATE/TIME	ENTERED ON DATE/TIME	ENTERED BY	PROCEDURE	VOLUME	PRIMARY PROVIDER
2	SH TEST	ALBANY	TEST,FRED	000007333	2/28/2018@12:00	3/6/2018@14:54:05	REISZ,MICHAEL E	SN010	13	AGABA,OLU
3	SH TEST	ALBANY	TEST,FOR TERRY	000003882	2/28/2018@12:00	3/6/2018@14:54:05	REISZ,MICHAEL E	SN010	31	AGABA,OLU
4	SH TEST	ALBANY	TEST,LYNN	000004565	2/28/2018@12:00	3/6/2018@14:54:05	REISZ,MICHAEL E	SN011	28	AGABA,OLU

Possible Late State Home Entrie

4.3.1.9 Procedure Reasons Report

The Procedures Reasons Report lists the reasons entered for Event Capture Procedures. Refer to Figure 113 for an example of the report selection screen.

Note:

- Locations, DSS Units, procedures, and procedure reasons must be defined before using this option.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers, diagnosis codes and their associated descriptions are reflective of the date the event occurred.

Step 1. Select a date range.

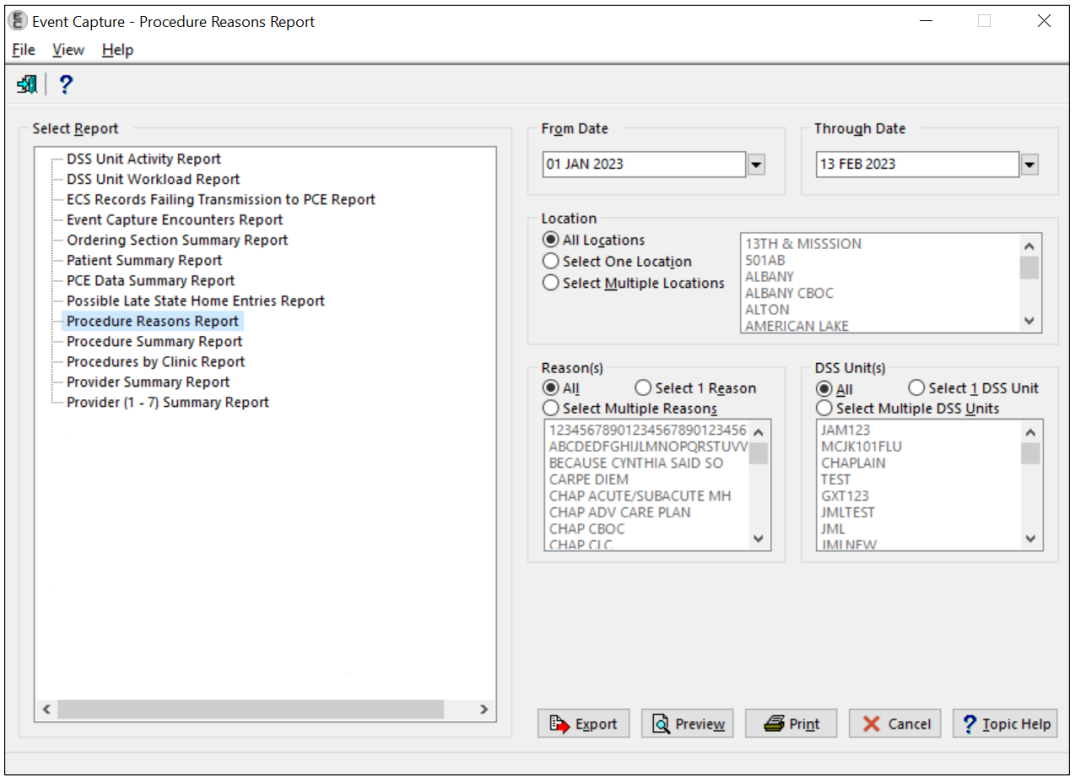
Step 2. Select one, all, or multiple Location(s).

Step 3. Select one, all, or multiple Procedure Reasons.

Step 4. Select one, all, or multiple DSS Unit(s).

Step 5. Export, Preview, Print, or Cancel the report.

Figure 113: Procedure Reasons Report Selection Criteria

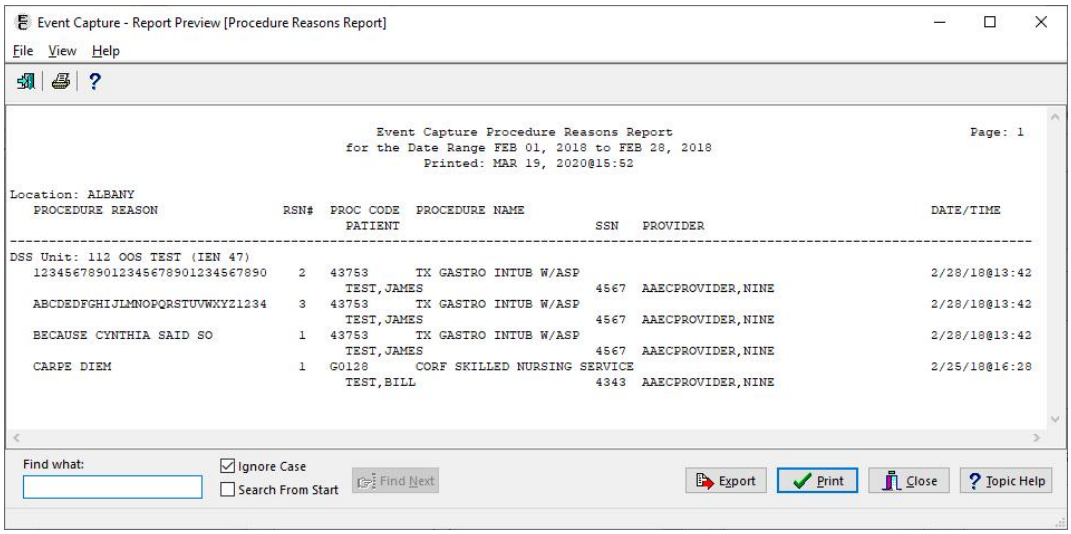


The report preview output includes the Location, DSS Unit, Procedure Reason, the number of times the reason was used, Procedure Code, Procedure Name, Patient Name, last four digits of Patient SSN, Provider Name, and Date and Time of the procedure (Figure 114). After previewing the report, the user has the option to export, print or close the report.

Note:

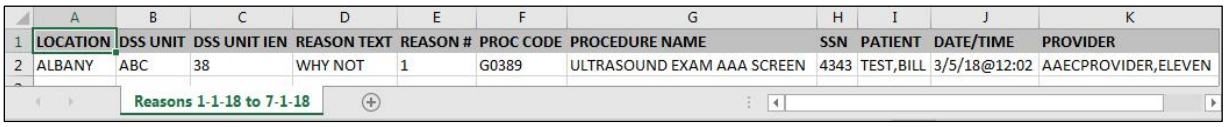
- When printing, the default printer is the device most recently used.

Figure 114: Report Preview — Procedure Reasons Report



This report is exportable into an Excel spreadsheet. The tab in Excel is titled “Reasons” followed by the Date Range the user selected (Figure 115).

Figure 115: Export — Procedure Reasons Report



LOCATION	DSS UNIT	DSS UNIT IEN	REASON TEXT	REASON #	PROC CODE	PROCEDURE NAME	SSN	PATIENT	DATE/TIME	PROVIDER
ALBANY	ABC	38	WHY NOT	1	G0389	ULTRASOUND EXAM AAA SCREEN	4343	TEST,BILL	3/5/18@12:02	AAECPROVIDER,ELEVEN

Reasons 1-1-18 to 7-1-18

4.3.1.10 Procedure Summary Report

The Procedure Summary Report lists the patients seen for a selected Procedure with one or all Providers within a defined date range for selected Locations and DSS Units.

The selection criteria include Date Range, Provider(s), Location(s), DSS Unit(s), and Procedure.

Refer to Figure 116 for an example of the report selection screen.

Step 1. Enter a date range.

Step 2. Select one or all Provider(s)

Step 3. Select one, all, or multiple Location(s)

Step 4. Select one, all, or multiple DSS Unit(s)

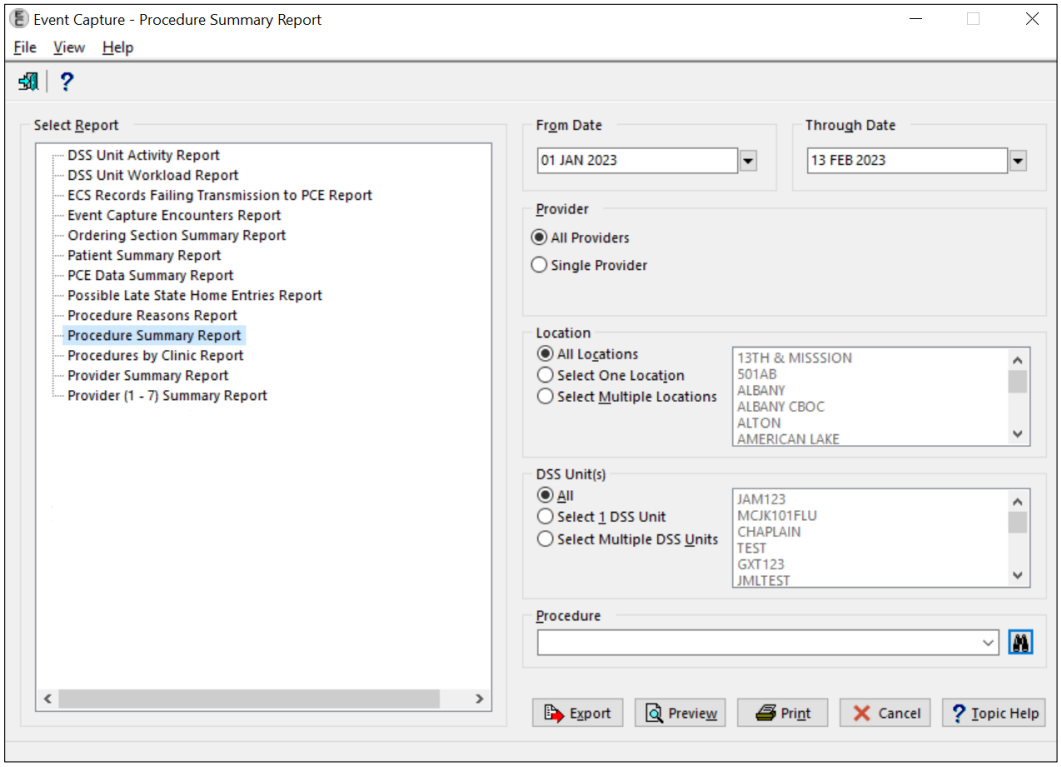
Step 5. Select a Procedure

Step 6. Export, Preview, Print, or Cancel the report

Note:

- When printing, the default printer is the device most recently used.

Figure 116: Procedure Summary Report Selection Criteria



The Preview output (Figure 117) includes the following:

The report header - Displayed at the top of the report. If a single DSS Unit is selected, the header will only be shown once. If multiple DSS Units or <ALL> DSS Units are selected, the header will be displayed every time records for a new DSS Unit are processed.

The report sub-header - Every time a new Location/DSS Unit combination is encountered, lines denoting the Location and DSS Unit are displayed.

Detail lines:

- Column header for the first detail line is "Category".
- Column headers for the second detail line are "CPT Code", "Proc Code", "Procedure Name", "# UNIQUES" and "Volume*".
- Column header for the third detail line is "CPT Modifier (Volume)".

Subtotal/Total lines:

- The "Totals for [PROVIDER]" line is displayed when a provider changes. This line displays the total number of unique patients seen by the provider for the selected procedure, and the total number of times the selected procedure was performed by the provider.
- The "Grand Totals for [DSS UNIT]" line is displayed when a DSS Unit changes. This line displays the Grand Total of unique patients seen for a selected procedure, as well as the Grand Total of times the selected procedure was completed for the DSS Unit.

Note:

- On the Grand Totals, the # UNIQUES is not always the sum of all # UNIQUES since each patient is only counted once for the selected procedure regardless of the number of times a patient is seen by other providers.
- If no records exist for the selected criteria, the following message is displayed to the user: "No data to report for the date range selected".

Figure 117: Preview — Procedure Summary Report

Event Capture - Report Preview [Procedure Summary Report]

File View Help

```
                                    EVENT CAPTURE PROCEDURE SUMMARY REPORT                                  Page:1
                                    FROM Jan 01, 2021  TO Dec 31, 2021
                                    Run Date : MAR 14, 2023@08:47:30

   Category
      CPT   Proc  Procedure Name                                # UNIQUES              Volume*
      Code  Code
          CPT Modifier (volume)
-------------------------------------------------------------------------------------------------------------------------

Location: ALBANY
DSS Unit: ALBANY

ECPATIENT,AA
   JAM CAT - update

      P2031 BR549 JUNIOR HAIR SAMPLES                                1                     1
          - 95 SYNCHRONOUS TELEMEDICINE SERVICE (1)
                                                             --------              --------
Totals for ECPATIENT,AA                                          1                     1


ECPATIENT,BB
   JAM CAT - update

      P2031 BR549 JUNIOR HAIR SAMPLES                                3                    10
                                                             --------              --------
Totals for ECPATIENT,BB                                          3                    10


ECPATIENT,CC
   JAM CAT - update

      P2031 BR549 JUNIOR HAIR SAMPLES                                1                     1
                                                             --------              --------
Totals for ECPATIENT,CC                                          1                     1


ECPATIENT,DD
   JAM CAT - update

      P2031 BR549 JUNIOR HAIR SAMPLES                                2                     2
          - 50 BILATERAL PROCEDURE (2)
                                                             --------              --------
Totals for ECPATIENT,DD                                          2                     2


                                                             --------              --------
                                                             --------              --------
Grand Totals for ALBANY                                          4                    14


    *Volume totals may represent days, minutes, numbers of procedures and/or a combination of these.
    UNIQUES totals may present the number of times a provider has used the given procedure code on a patient
    during the selected time period.  The Grand Total number of UNIQUES may not equal the sum of UNIQUES, as a
    patient may have been seen by more than one Provider.
```

Find what: Ignore Case Search From Start Find Next Export Print Close Topic Help

The Export option produces the information for the selected criteria in Excel format (Figure 118)

Figure 118: Export — Procedure Summary Report

	A	B	C	D	E	F	G	H	I	J	K	L
1	LOCATION	DSS UNIT	CATEGORY	PROVIDER	CPT CODE	CPT MOD #1 (VOL)	CPT MOD #2 (VOL)	CPT MOD #3 (VOL)	PROCEDURE CODE	PROCEDURE NAME	NUMBER UNIQUES	PROCEDURE QUANTITY
2	ALBANY	ALBANY	JAM CAT - update	ECPATIENT,AA	P2031	- 95 SYNCHRONOUS TELEMEDICINE			BR549	JUNIOR HAIR SAMPLES	1	1
3	ALBANY	ALBANY	JAM CAT - update	ECPATIENT,BB	P2031				BR549	JUNIOR HAIR SAMPLES	3	10
4	ALBANY	ALBANY	JAM CAT - update	ECPATIENT,CC	P2031				BR549	JUNIOR HAIR SAMPLES	1	1
5	ALBANY	ALBANY	JAM CAT - update	ECPATIENT,DD	P2031	- 50 BILATERAL PROCEDURE(2)			BR549	JUNIOR HAIR SAMPLES	2	2

Procedure Summary Report

4.3.1.11 Procedures by Clinic Report

The Procedures by Clinic Report allows the user to print, preview, or export procedures used by a selected clinic.

The selection criteria include Date Range, Sort Method, Location, Clinic, and DSS Unit(s). Refer to Figure 119 for an example of the report selection screen.

Step 1. Enter a date range.

Step 2. Select Sort Method of Date or Patient.

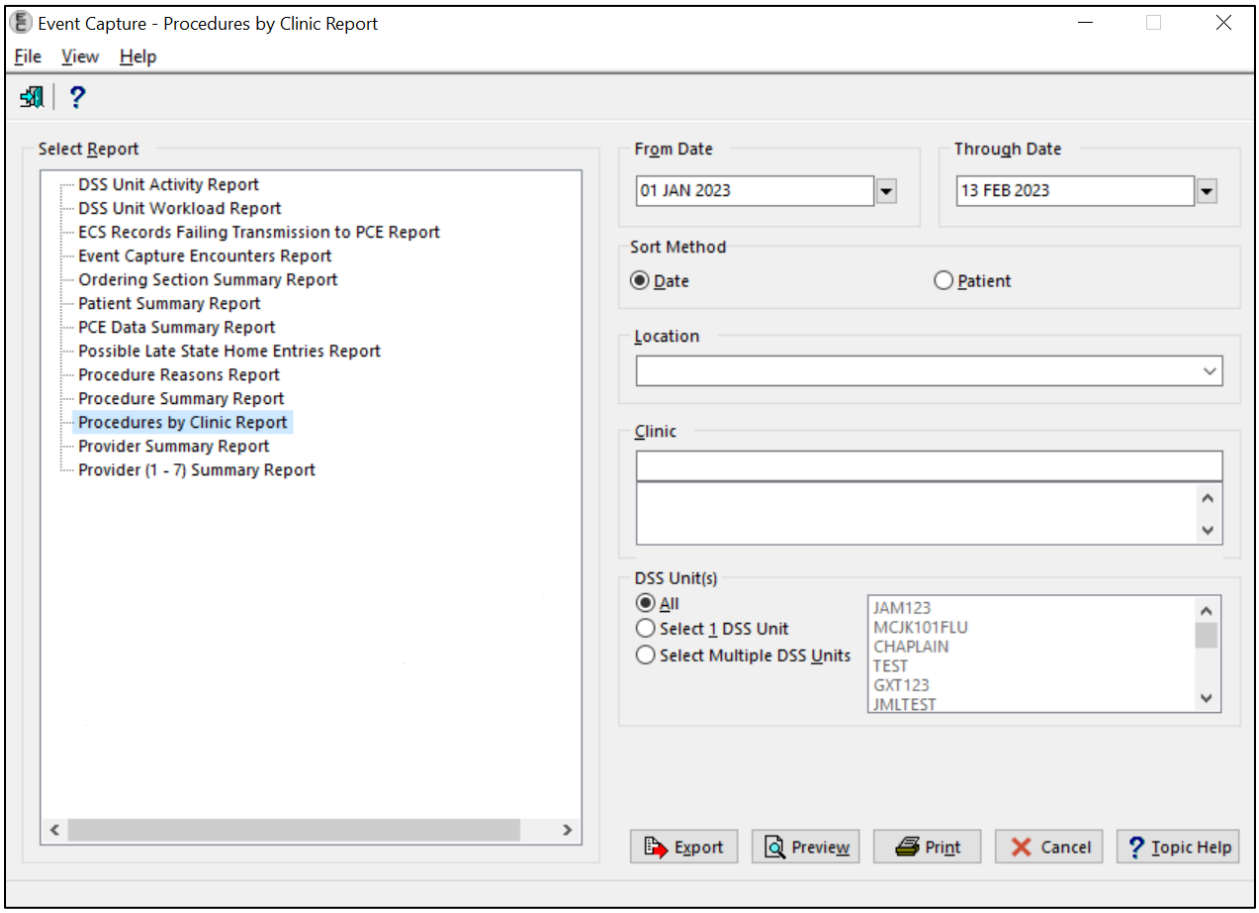
Step 3. Select a Location.

Step 4. Select a Clinic.

Step 5. Select one, multiple, or all DSS Units.

Step 6. Export, Preview, Print, or Cancel the report.

Figure 119: Procedures by Clinic Report



The report preview (Figure 120) separates the output by DSS Unit. Each DSS Unit displays the Patient, SSN, Procedure Date/Time, Procedure Code, Procedure Name, Procedure Volume, and Provider.

Figure 120: Preview — Procedures by Clinic Report

Event Capture - Report Preview [Procedures by Clinic Report]

File View Help

```
                                                  For Location: ALBANY
                                Date Range: 02/12/2023 - 03/14/2023
                                Clinic: ORTHO
                                Sorted By: Procedure Date

Patient                       SSN   Procedure      Procedure                        Procedure   Provider
                                    Date/Time      Code  Name                         Volume

-----------------------------------------------------------------------------------------------------------------------------

DSS Unit: CHAPLAIN (IEN #5)

TEST,BILL                     XXXX  02/16/23@1646  97535 SELF CARE MNGMENT TRAININ       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/16/23@1646  97535 SELF CARE MNGMENT TRAININ       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/16/23@1646  97535 SELF CARE MNGMENT TRAININ       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/17/23@1442  52001 CYSTOSCOPY REMOVAL OF CLO       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/17/23@1442  52001 CYSTOSCOPY REMOVAL OF CLO       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/21/23@1443  L3330 LIFTS ELEVATION METAL EXT       5      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/23/23@1637  01710 ANESTH ELBOW AREA SURGERY       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/23/23@1637  01712 ANESTH UPPR ARM TENDON SU       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/23/23@1648  52001 CYSTOSCOPY REMOVAL OF CLO       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/23/23@1648  01710 ANESTH ELBOW AREA SURGERY       1      AAECPROVIDER,EIGHT
TEST,BILL                     XXXX  02/24/23@1318  52001 CYSTOSCOPY REMOVAL OF CLO       1      AAECPROVIDER,NINE

DSS Unit: JAM TEST UNIT (IEN #17)

ECPATIENT,FOUR                XXXX  02/17/23@1337  0001F HEART FAILURE COMPOSITE         1      AAECPROVIDER,TWO
ECPATIENT,FOUR                XXXX  02/17/23@1337  01630 ANESTH SURGERY OF SHOULDE       1      AAECPROVIDER,EIGHT
ECPATIENT,ONE                 XXXX  02/17/23@1352  36406 BL DRAW <3 YRS OTHER VEIN       2      AAECPROVIDER,ONE
ECPATIENT,ONE                 XXXX  02/17/23@1352  86344 LEUKOCYTE PHAGOCYTOSIS          1      AAECPROVIDER,ONE
ECPATIENT,THREE               XXXX  02/27/23@1253  01634 ANESTH SHOULDER JOINT AMP       1      AAECPROVIDER,SEVEN
```

Find what: Ignore Case Search From Start Find Next Export Print Close Topic Help

The exportable version of the "Procedures by Clinic Report" displays the Location, DSS Unit (IEN #), Clinic, Patient, SSN, Date of Procedure, Procedure Code, Procedure Name, Volume, and Provider Name (Figure 121).

Figure 121: Export — Procedures by Clinic Report

	A	B	C	D	E	F	G	H	I	J
1	LOCATION	DSS UNIT(IEN #)	CLINIC	PATIENT	SSN	DATE OF PROCEDURE	PROCEDURE CODE	PROCEDURE NAME	VOLUME	PROVIDER NAME
2	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/16/23@16:46	97535	SELF CARE MNGMENT TRAININ	1	AAECPROVIDER,EIGHT
3	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/16/23@16:46	97535	SELF CARE MNGMENT TRAININ	1	AAECPROVIDER,EIGHT
4	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/16/23@16:46	97535	SELF CARE MNGMENT TRAININ	1	AAECPROVIDER,EIGHT
5	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/17/23@14:42	52001	CYSTOSCOPY REMOVAL OF CLO	1	AAECPROVIDER,EIGHT
6	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/17/23@14:42	52001	CYSTOSCOPY REMOVAL OF CLO	1	AAECPROVIDER,EIGHT
7	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/21/23@14:43	L3330	LIFTS ELEVATION METAL EXT	5	AAECPROVIDER,EIGHT
8	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/23/23@16:37	01710	ANESTH ELBOW AREA SURGERY	1	AAECPROVIDER,EIGHT
9	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/23/23@16:37	01712	ANESTH UPPR ARM TENDON SU	1	AAECPROVIDER,EIGHT
10	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/23/23@16:48	52001	CYSTOSCOPY REMOVAL OF CLO	1	AAECPROVIDER,EIGHT
11	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/23/23@16:48	01710	ANESTH ELBOW AREA SURGERY	1	AAECPROVIDER,EIGHT
12	ALBANY	CHAPLAIN(IEN #5)	ORTHO	TEST,BILL	XXXXXXXXX	02/24/23@13:18	52001	CYSTOSCOPY REMOVAL OF CLO	1	AAECPROVIDER,NINE
13	ALBANY	JAM TEST UNIT(IEN #17)	ORTHO	ECPATIENT,FOUR	XXXXXXXXX	02/17/23@13:37	0001F	HEART FAILURE COMPOSITE	1	AAECPROVIDER,TWO
14	ALBANY	JAM TEST UNIT(IEN #17)	ORTHO	ECPATIENT,FOUR	XXXXXXXXX	02/17/23@13:37	01630	ANESTH SURGERY OF SHOULDE	1	AAECPROVIDER,EIGHT
15	ALBANY	JAM TEST UNIT(IEN #17)	ORTHO	ECPATIENT,ONE	XXXXXXXXX	02/17/23@13:52	36406	BL DRAW <3 YRS OTHER VEIN	2	AAECPROVIDER,ONE
16	ALBANY	JAM TEST UNIT(IEN #17)	ORTHO	ECPATIENT,ONE	XXXXXXXXX	02/17/23@13:52	86344	LEUKOCYTE PHAGOCYTOSIS	1	AAECPROVIDER,ONE
17	ALBANY	JAM TEST UNIT(IEN #17)	ORTHO	ECPATIENT,THREE	XXXXXXXXX	02/27/23@12:53	01634	ANESTH SHOULDER JOINT AMP	1	AAECPROVIDER,SEVEN

Procedures by Clinic Report

4.3.1.12 Provider Summary Report

The Provider Summary Report allows the user to print, preview, or export the number of procedures performed for one or all locations and one or all DSS Units within a specified date range. Within each DSS Unit for each location, the report is sorted by provider, category (if the DSS Unit is defined to sort procedures by category), and procedures (listed alphabetically). Refer to Figure 122 for an example of the report selection screen.

Note:

- Locations, DSS Units, categories, procedures, and procedure reasons must be defined before generating this report.
- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.

Step 1. Enter a date range.

Step 2. Select one or all Location(s).

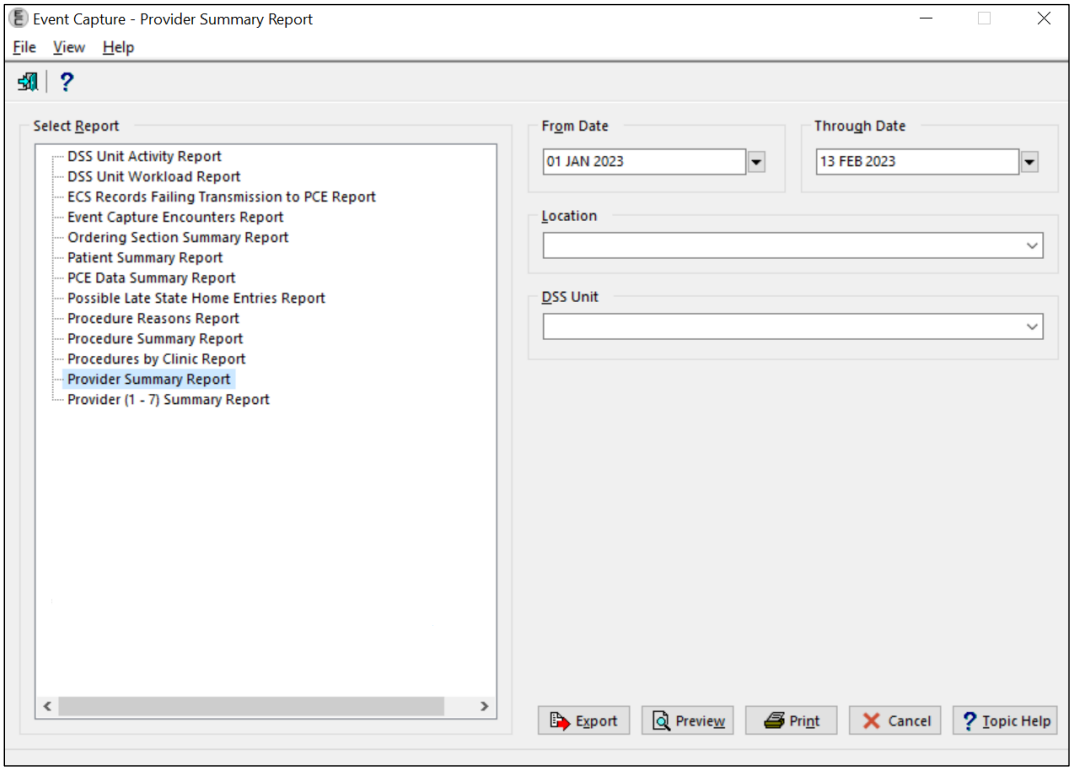
Step 3. Select one or all DSS Unit(s).

Step 4. Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.

Figure 122: Provider Summary Report Selection Criteria

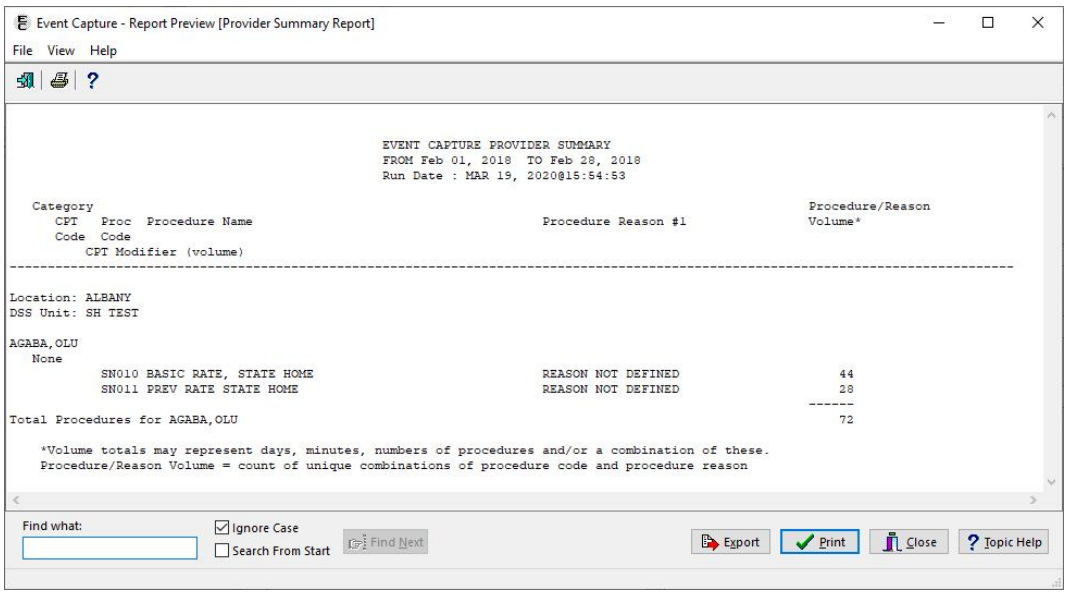


The preview option output includes Location, DSS Unit, Provider, Category (if applicable), CPT Code, Procedure Code, Procedure Name, Procedure Reason, Volume, Modifier(s), and Total number of procedures performed by the provider within the specified date range (Figure 123).

Note:

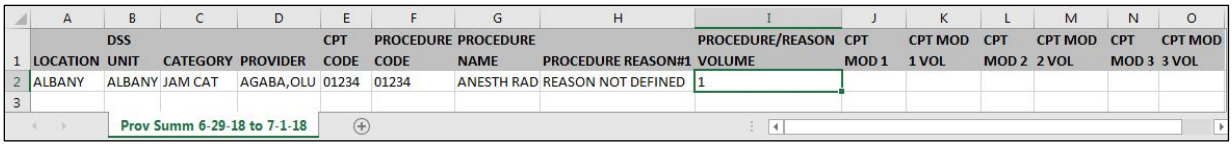
- If Procedure Reason #1 is not listed, the report prints “Reason Not Defined”.

Figure 123: Preview — Provider Summary Report



The Export option produces the information for the selected criteria in Excel format (Figure 124).

Figure 124: Export — Provider Summary Report



LOCATION	DSS UNIT	CATEGORY	PROVIDER	CPT CODE	PROCEDURE CODE	PROCEDURE NAME	PROCEDURE REASON#1	PROCEDURE/REASON VOLUME	CPT MOD 1	CPT MOD 1 VOL	CPT MOD 2	CPT MOD 2 VOL	CPT MOD 3	CPT MOD 3 VOL
ALBANY	ALBANY	JAM CAT	AGABA,OLU	01234	01234	ANESTH RAD	REASON NOT DEFINED	1						

Prov Summ 6-29-18 to 7-1-18

4.3.1.13 Provider (1–7) Summary Report

The Provider (1–7) Summary Report summarizes the workload of providers for a selected date showing how many times a specific procedure was performed on a patient with the selected provider. This report provides the ability to view up to seven provider numbers for providers within a Location/DSS Unit. Refer to Figure 125 to view the report selection screen.

Note:

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.

Step 1. Enter a date range.

Step 2. Enter the name of a Provider.

Step 3. Select one, all or multiple Location(s).

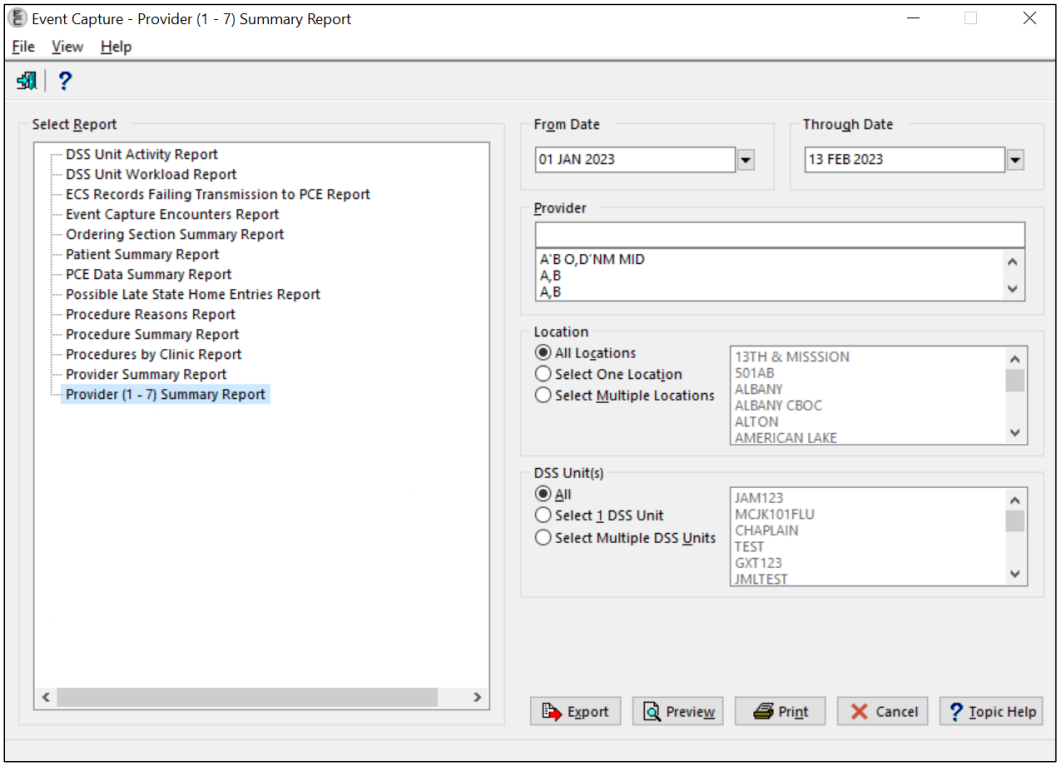
Step 4. Select one, all, or multiple DSS Unit(s).

Step 5. Export, Preview, Print, or Cancel the report.

Note:

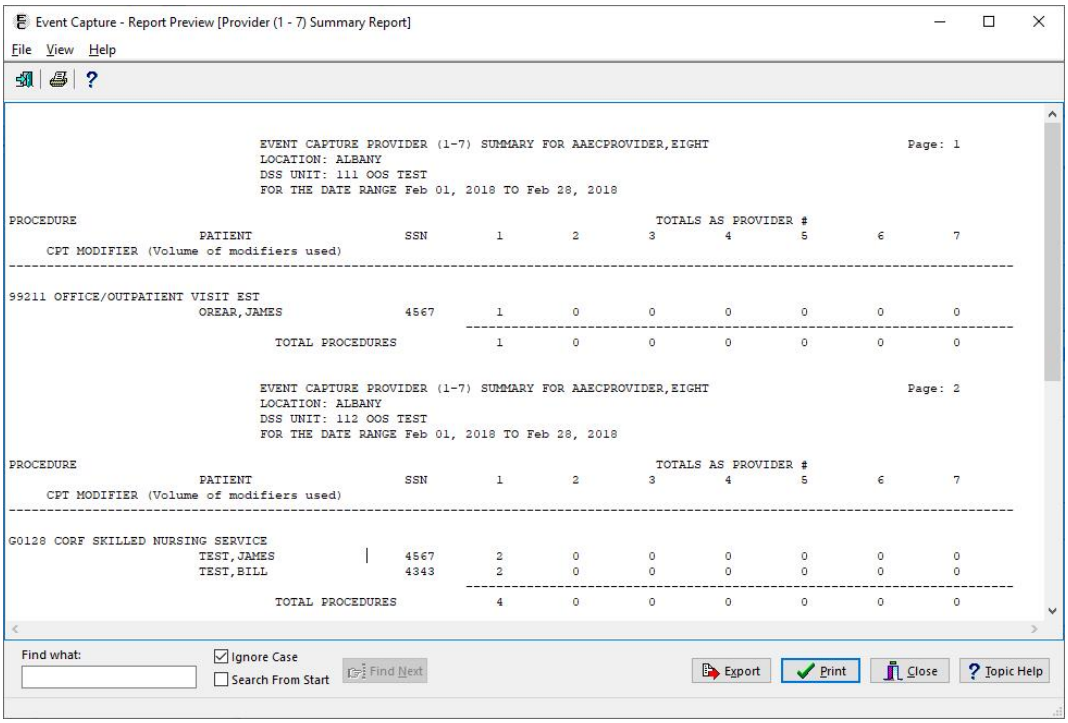
- When printing, the default printer is the device most recently used.

Figure 125: Provider (1–7) Summary Report Selection Criteria



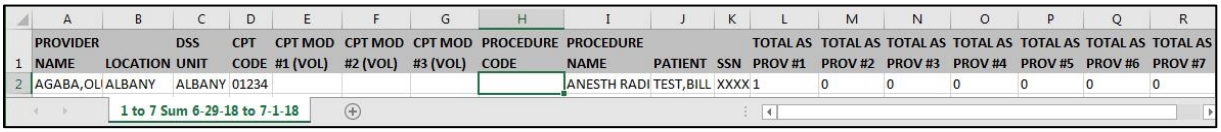
The Preview option output includes Procedure Code, Procedure Name, Patient Name, Last four digits of patient SSN, a matrix showing how many times a specific procedure was performed on a specific patient with the selected provider as Provider 1, Provider 2, to Provider 7, Modifier(s), Subtotals by procedure, and Grand Total of procedures (Figure 126) After previewing the report, the user has the option to export, print or close the report.

Figure 126: Preview — Provider (1–7) Summary Report



The Export option produces the information for the selected criteria in Excel format (Figure 127).

Figure 127: Export — Provider (1–7) Summary Report



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	PROVIDER NAME	LOCATION	DSS UNIT	CPT CODE	CPT MOD #1 (VOL)	CPT MOD #2 (VOL)	CPT MOD #3 (VOL)	PROCEDURE CODE	PROCEDURE NAME	PATIENT	SSN	TOTAL AS PROV #1	TOTAL AS PROV #2	TOTAL AS PROV #3	TOTAL AS PROV #4	TOTAL AS PROV #5	TOTAL AS PROV #6	TOTAL AS PROV #7
2	AGABA,OL	ALBANY	ALBANY	01234					ANESTH RADI	TEST,BILL	XXXX	1	0	0	0	0	0	0

1 to 7 Sum 6-29-18 to 7-1-18

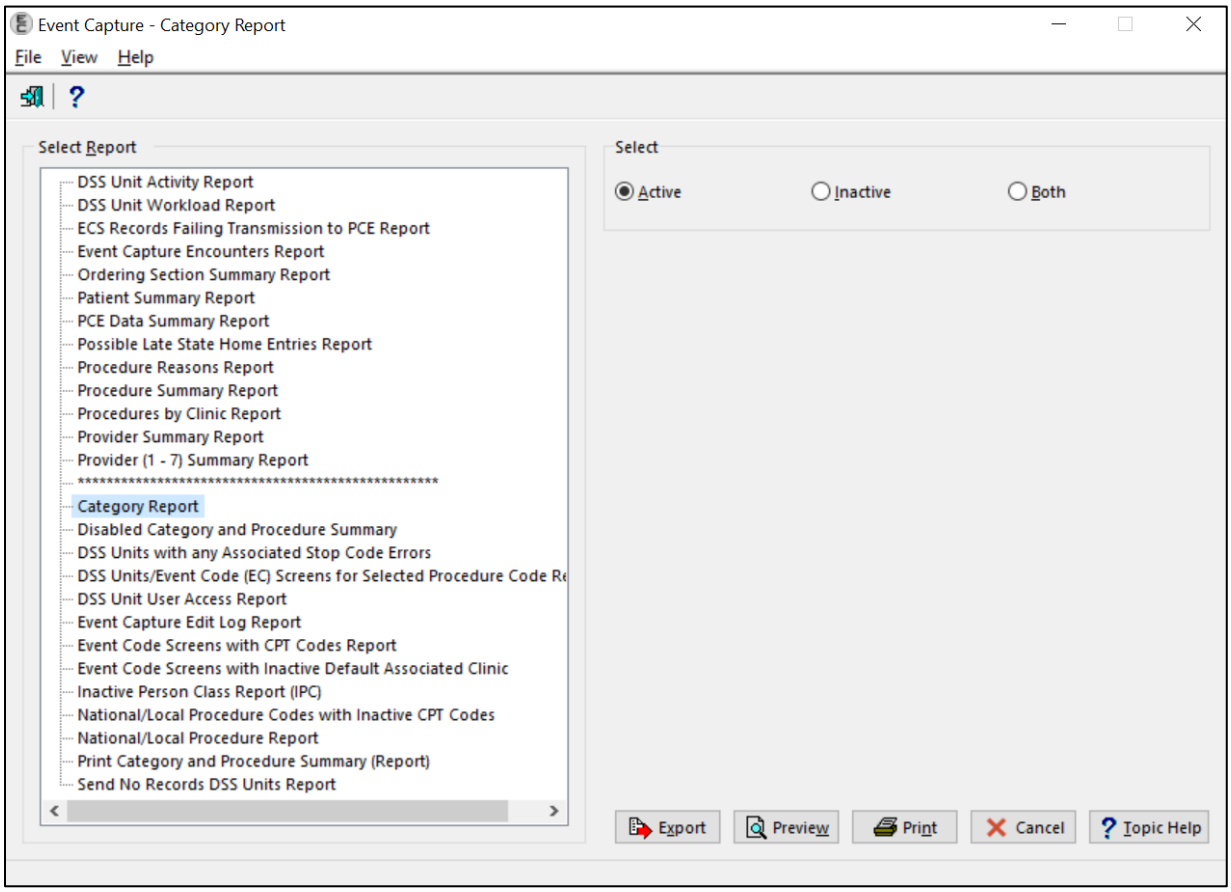
4.3.2 Reports Available to ECMGR Key Holders Only

The following reports are available only to ECMGR key holders:

1. Category Report
2. Disabled Category and Procedure Summary
3. DSS Units with any Associated Stop Code Errors
4. DSS Units/Event Code Screens for Selected Procedure Code Report
5. DSS Unit User Access Report
6. Event Capture Edit Log Report
7. Event Code Screens with CPT Codes Report
8. Event Code Screens with Inactive Default Associated Clinic
9. Inactive Person Class Report (IPC)
10. National / Local Procedure Codes with Inactive CPT Codes
11. National / Local Procedure Report
12. Print Category and Procedure Summary (Report)
13. Send No Records DSS Units Report

ECMGR reports are displayed in the Select Report area, below the asterisk line (Figure 128).

Figure 128: Report Selection Screen for ECMGR Key Holders



4.3.2.1 Category Report

The Category Report allows Management users to print, preview, or export the established local categories. This report can be generated for active categories, inactive categories, or all categories. For inactive categories, the inactive date is included in the output. Refer to Figure 129 for an example of the report selection screen.

Note:

- Use the Category — Add or Update Categories option to create categories before selecting this report.

Step 1. Select the report.

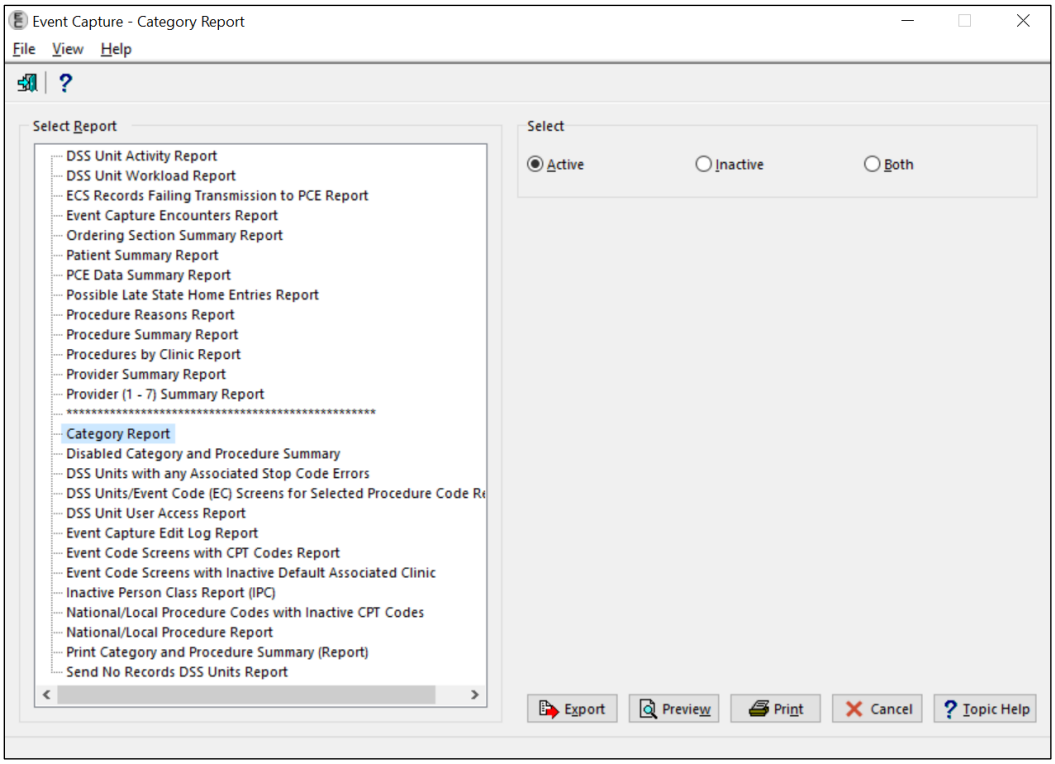
Step 2. Choose a status of Active, Inactive, or Both.

Step 3. Export, Preview, Print, or Cancel the report.

Note:

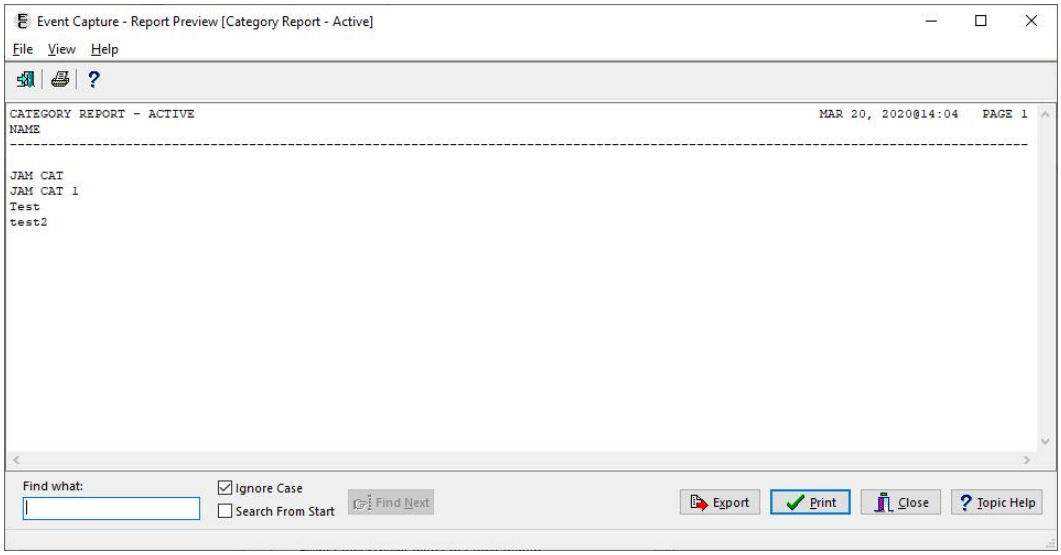
- When printing, the default printer is the device most recently used.

Figure 129: Category Report Selection Criteria



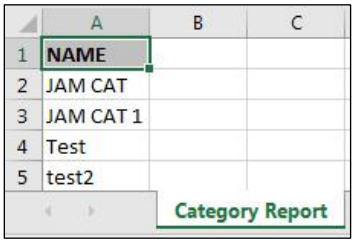
Selecting Active and then Preview produces output showing the list of active categories (Figure 130). After previewing the report, the user has the option to export, print or close the report.

Figure 130: Report Preview — Category Report (Active)



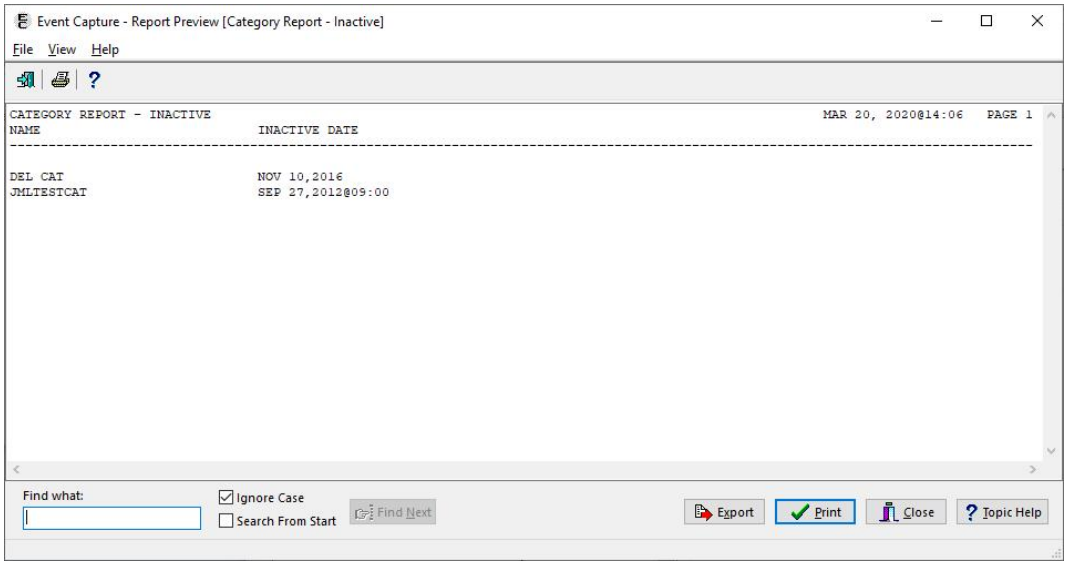
The Export option produces the information for the selected criteria in Excel format (Figure 131).

Figure 131: Export — Category Report (Active)



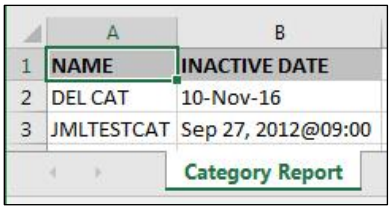
Selecting Inactive and then Preview produces output that displays inactive categories (Figure 132).

Figure 132: Report Preview — Category Report (Inactive)



The Export option produces the information for the selected criteria in Excel format (Figure 133).

Figure 133: Export — Category Report (Inactive)

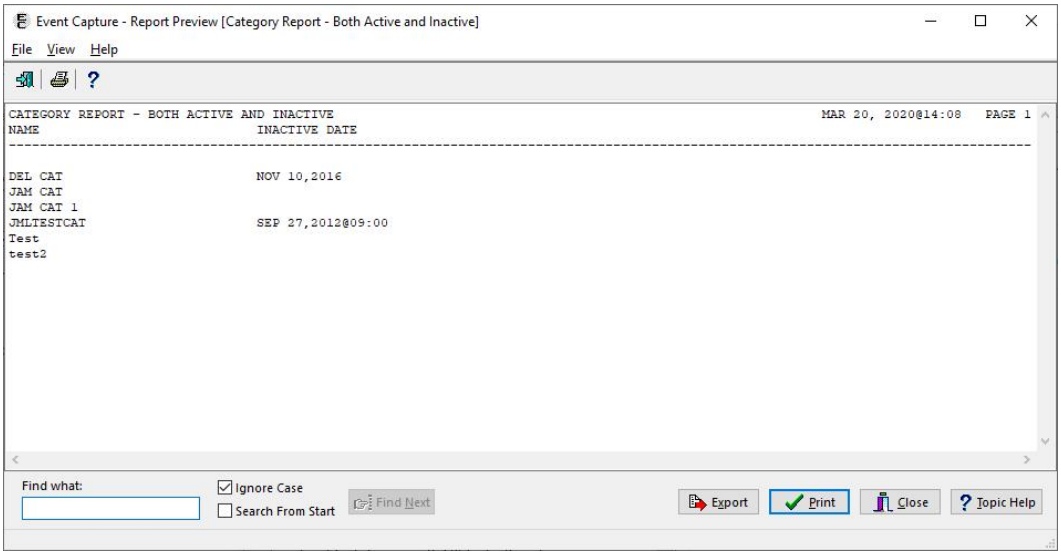


	A	B
1	NAME	INACTIVE DATE
2	DEL CAT	10-Nov-16
3	JMLTESTCAT	Sep 27, 2012@09:00

Category Report

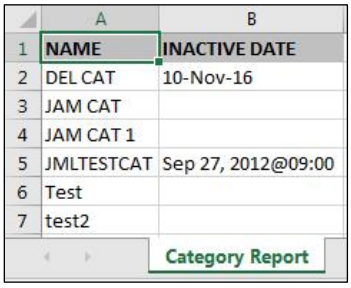
Selecting Both and then Preview produces output that displays both active and inactive categories (Figure 134).

Figure 134: Report Preview — Category Report (Both Active and Inactive)



The Export option produces the information for the selected criteria in Excel format (Figure 135).

Figure 135: Export — Category Report (Both Active and Inactive)



	A	B
1	NAME	INACTIVE DATE
2	DEL CAT	10-Nov-16
3	JAM CAT	
4	JAM CAT 1	
5	JMLTESTCAT	Sep 27, 2012@09:00
6	Test	
7	test2	

Category Report

4.3.2.2 Disabled Category and Procedure Summary

This report allows Management users to print, preview, or export the ECS categories that have been disabled for one or all DSS Units within a specified location. Event Code Screens that are comprised of DSS Units that allow category use and have Event Code Screens defined using the disabled category will appear on this report. Refer to Figure 136 for an example of the report selection screen.

Step 1. Select the report.

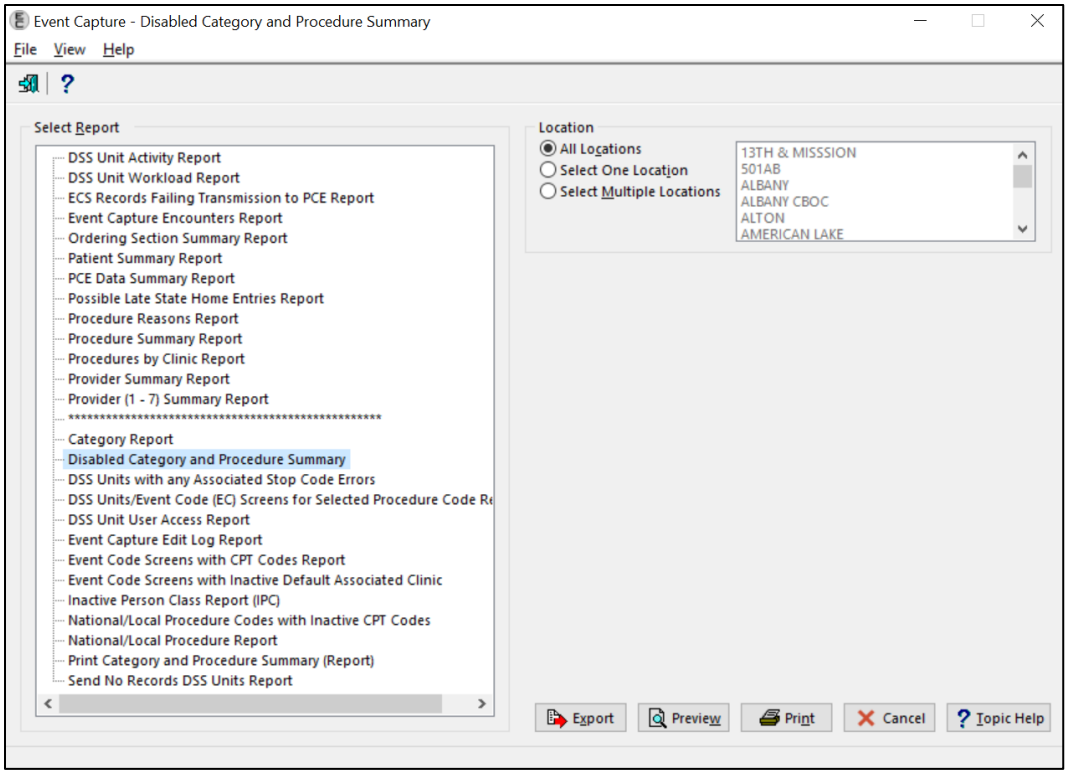
Step 2. Select one, all, or multiple Location(s).

Step 3. Export, Preview, Print, or Cancel the report.

Note:

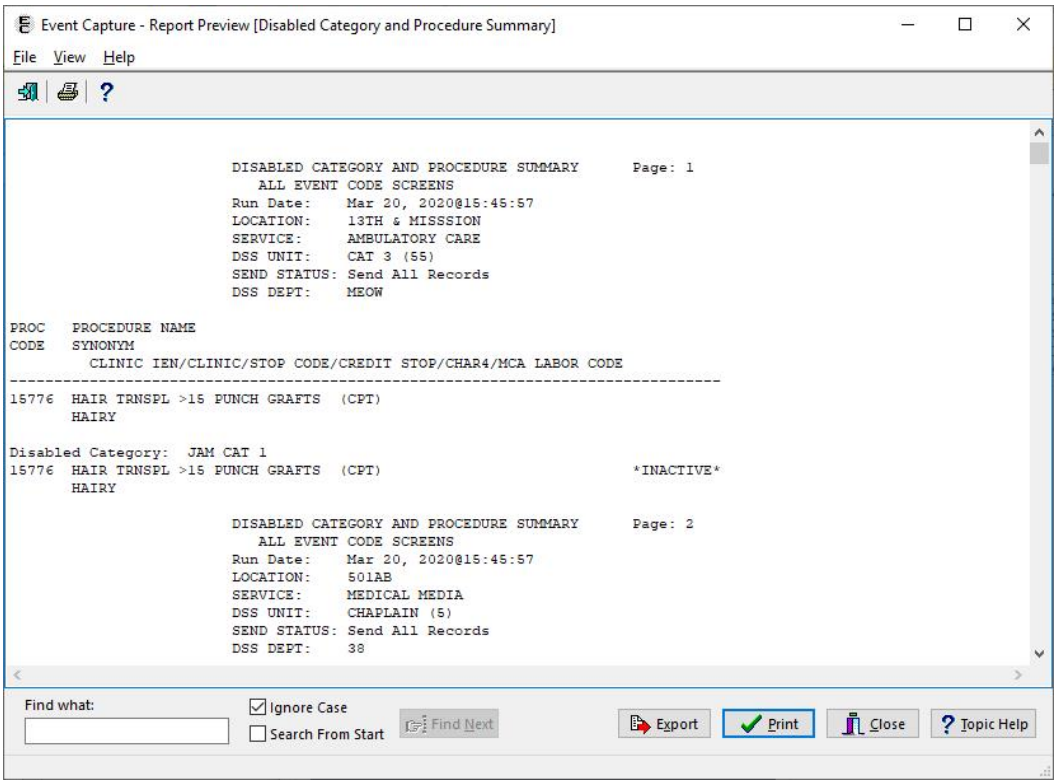
- When printing, the default printer is the device most recently used.

Figure 136: Disabled Category and Procedure Summary Report Selection Criteria



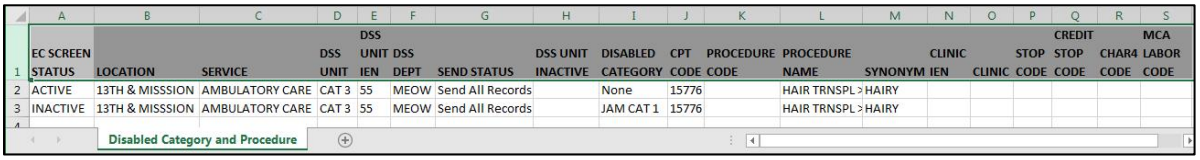
The report preview output includes the Run Date, Location, Service, DSS Unit Name and IEN, Send Status, and DSS Dept. For each disabled procedure, the report also includes Procedure Code, Procedure Name, Synonym, Clinic IEN, Clinic, Stop Code, Credit Stop Code, CHAR4 Code and MCA Labor Code (Figure 137). After previewing the report, the user has the option to export, print or close the report.

Figure 137: Report Preview — Disabled Category and Procedure Summary



The Export option produces the information for the selected criteria in Excel format (Figure 138). The exported output includes EC Screen Status, Location, Service, DSS Unit, DSS Unit IEN, DSS Dept., Send Status, DSS Unit Inactive, Disabled Category, CPT Code, Procedure Code, Procedure Name, Synonym, Clinic IEN, Clinic, Clinic Stop Code, Credit Stop Code, CHAR4 Code and MCA Labor Code.

Figure 138: Export — Disabled Category and Procedure Summary



EC SCREEN STATUS	LOCATION	SERVICE	DSS UNIT	DSS UNIT IEN	DSS DEPT	SEND STATUS	DSS UNIT INACTIVE	DISABLED CATEGORY	CPT CODE	PROCEDURE CODE	PROCEDURE NAME	SYNONYM	CLINIC IEN	CLINIC	STOP CODE	CREDIT STOP CODE	CHAR4 CODE	MCA LABOR CODE
ACTIVE	13TH & MISSSION	AMBULATORY CARE	CAT 3	55	MEOW	Send All Records		None	15776		HAIR TRNSPL >	HAIRY						
INACTIVE	13TH & MISSSION	AMBULATORY CARE	CAT 3	55	MEOW	Send All Records		JAM CAT 1	15776		HAIR TRNSPL >	HAIRY						

Disabled Category and Procedure

4.3.2.3 DSS Units with any Associated Stop Code Errors Report

The Event Capture software restricts DSS-only workload to using valid Stop Codes. This report provides Management users a list of DSS Units with any error with the Associated Stop Code. Refer to Figure 139 for an example of the report selection screen.

Note:

- To assist sites in locating DSS Units that have invalid associated Stop Codes, the DSS Unit list with Secondary Associated Stop Codes is provided. This may be attached as a secondary menu option and run as often as needed. The only prompt is for Device.
- Select an active, non-secondary Stop Code to replace the Stop Code in the DSS Unit set up.

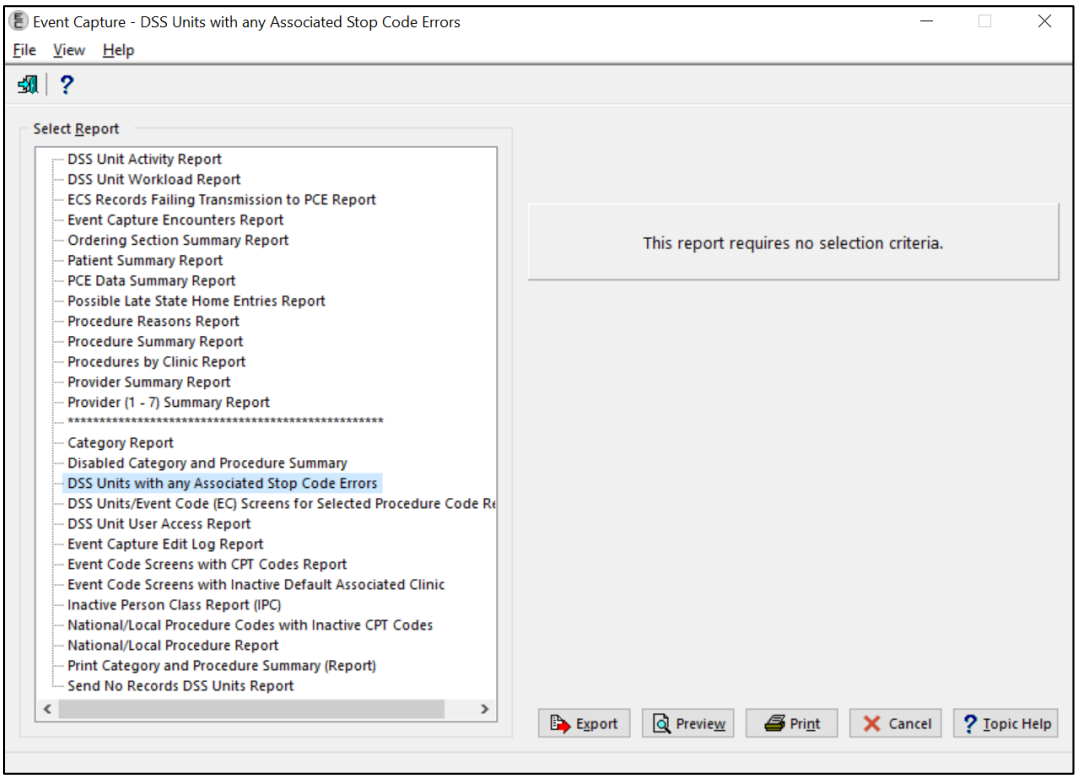
Step 1. Select the report.

Step 2. Export, Preview, Print, or Cancel the report.

Note:

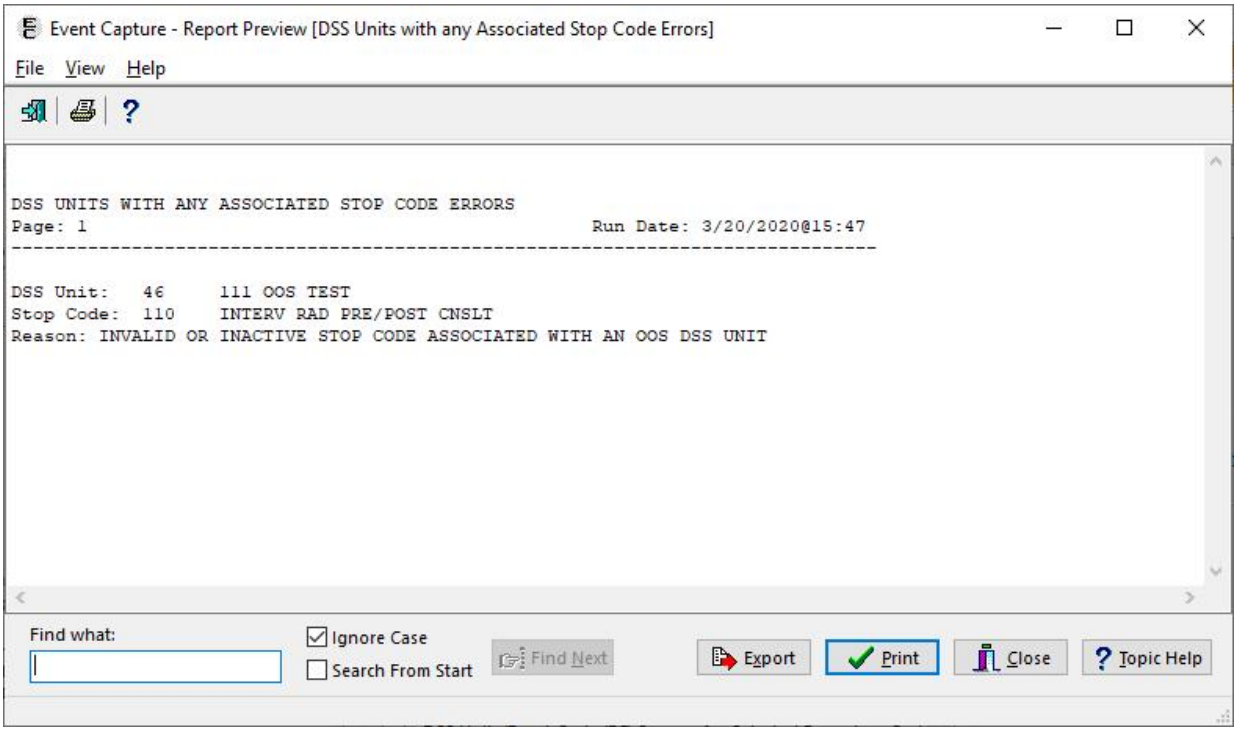
- When printing, the default printer is the device most recently used.

Figure 139: DSS Units with Any Associated Stop Code Errors Selection Criteria



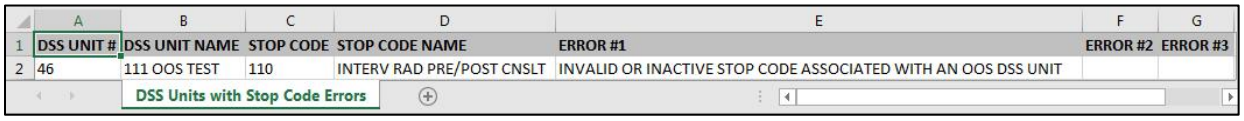
The report preview produces output that includes the DSS Unit IEN and name, Associated Stop Code IEN and name, and the reason for the error (Figure 140). After previewing the report, the user has the option to export, print or close the report.

Figure 140: Report Preview — DSS Units with Any Associated Stop Code Errors



The Export option produces the information in Excel format (Figure 141).

Figure 141: Export — DSS Units with Any Associated Stop Code Errors



DSS UNIT #	DSS UNIT NAME	STOP CODE	STOP CODE NAME	ERROR #1	ERROR #2	ERROR #3
46	111 OOS TEST	110	INTERV RAD PRE/POST CNSLT	INVALID OR INACTIVE STOP CODE ASSOCIATED WITH AN OOS DSS UNIT		

DSS Units with Stop Code Errors

4.3.2.4 DSS Units/Event Code Screens for Selected Procedure Code Report

The DSS Units/Event Code (EC) Screens for Selected Procedure Code Report allows Management users to print, preview, or export DSS unit and EC screen data for a selected procedure code and specified locations. Refer to Figure 142 for an example of the report selection screen.

Note:

- The design of this report is for a 132-column format.

Step 1. Select the report.

Step 2. Select one, all, or multiple Location(s).

Step 3. Select a Procedure.

Step 4. Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.

Figure 142: DSS Units/Event Code Screens for Selected Procedure Code Report Selection Criteria

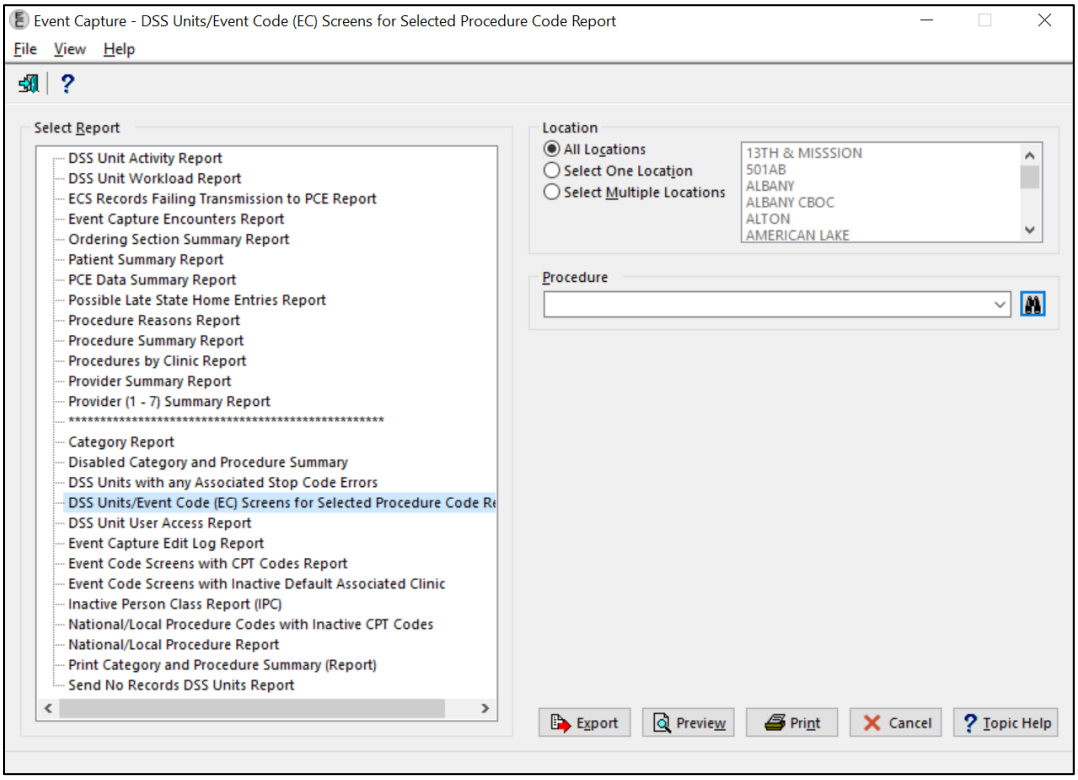
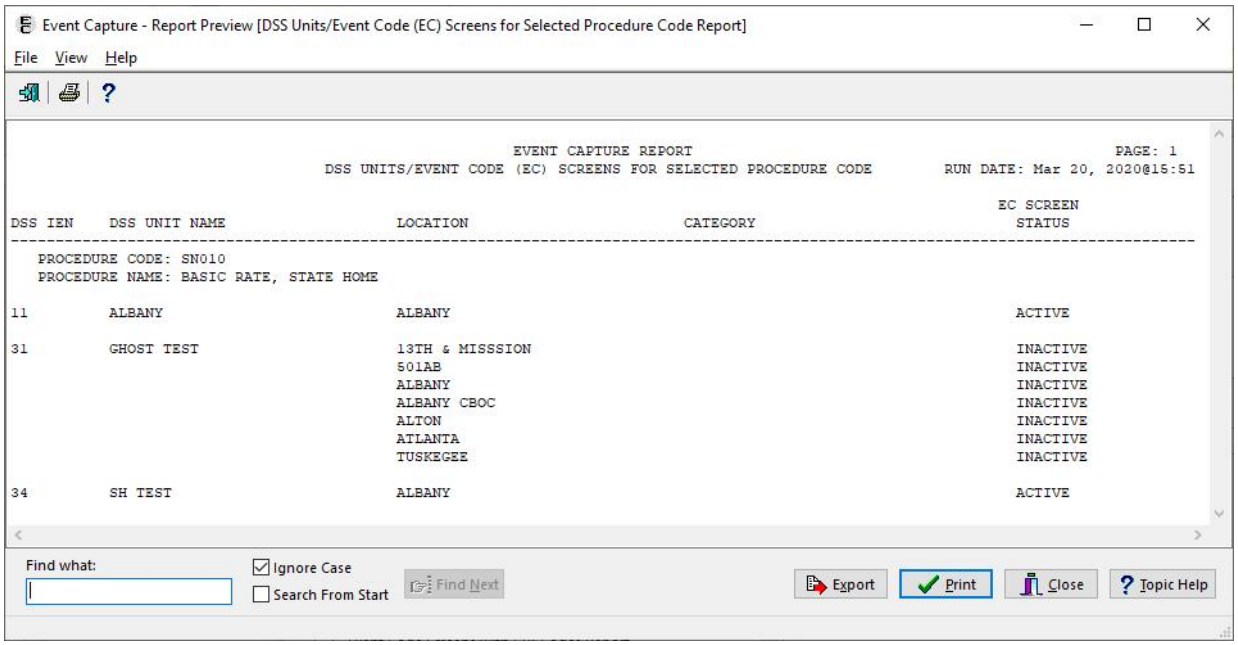
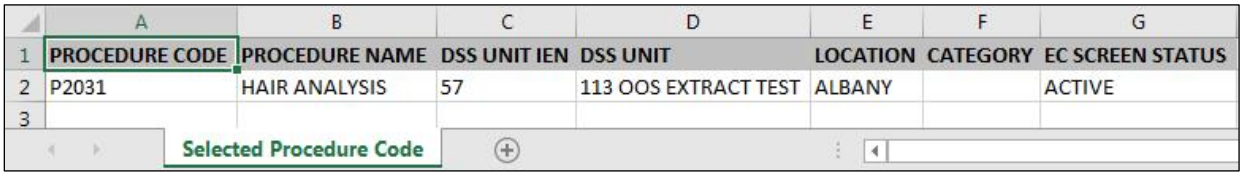


Figure 143: Report Preview — DSS Units/Event Code (EC) Screens for Selected Procedure Code Report



This report is exportable into an Excel spreadsheet (Figure 144). The tab in Excel is titled "Selected Procedure Code".

Figure 144: Export — DSS Units/Event Code (EC) Screens for Selected Procedure Code Report



	A	B	C	D	E	F	G
1	PROCEDURE CODE	PROCEDURE NAME	DSS UNIT IEN	DSS UNIT	LOCATION	CATEGORY	EC SCREEN STATUS
2	P2031	HAIR ANALYSIS	57	113 OOS EXTRACT TEST	ALBANY		ACTIVE
3							

Selected Procedure Code

4.3.2.5 DSS Unit User Access Report

The DSS Unit User Access Report allows Management users to print, preview, or export information regarding user with access to DSS unit data for specified locations and DSS units. Refer to Figure 145 for an example of the report selection screen.

Note:

- Similar information is available using the Management Menu > Access by User option (Refer to Section 4.4.3, Grant Access to DSS Units by User).

Step 1. Select the report.

Step 2. Select one or all Location(s).

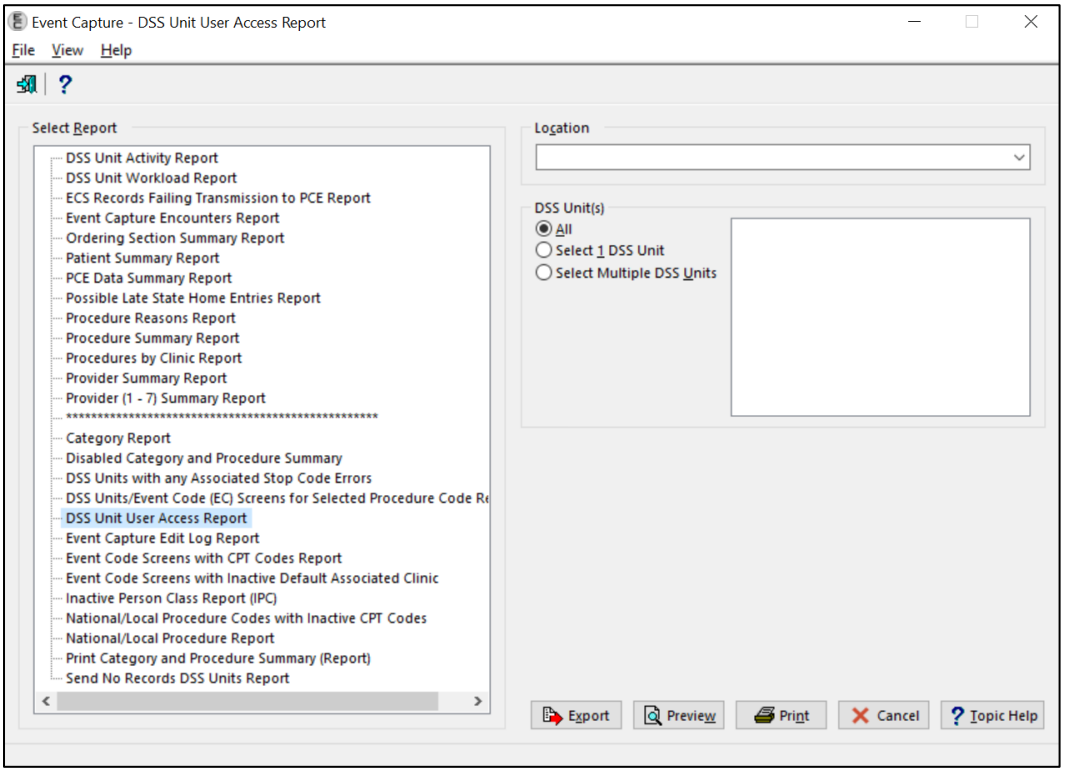
Step 3. Select one, all, or multiple DSS Units.

Step 4. Export, Preview, Print, or Cancel the report.

Note:

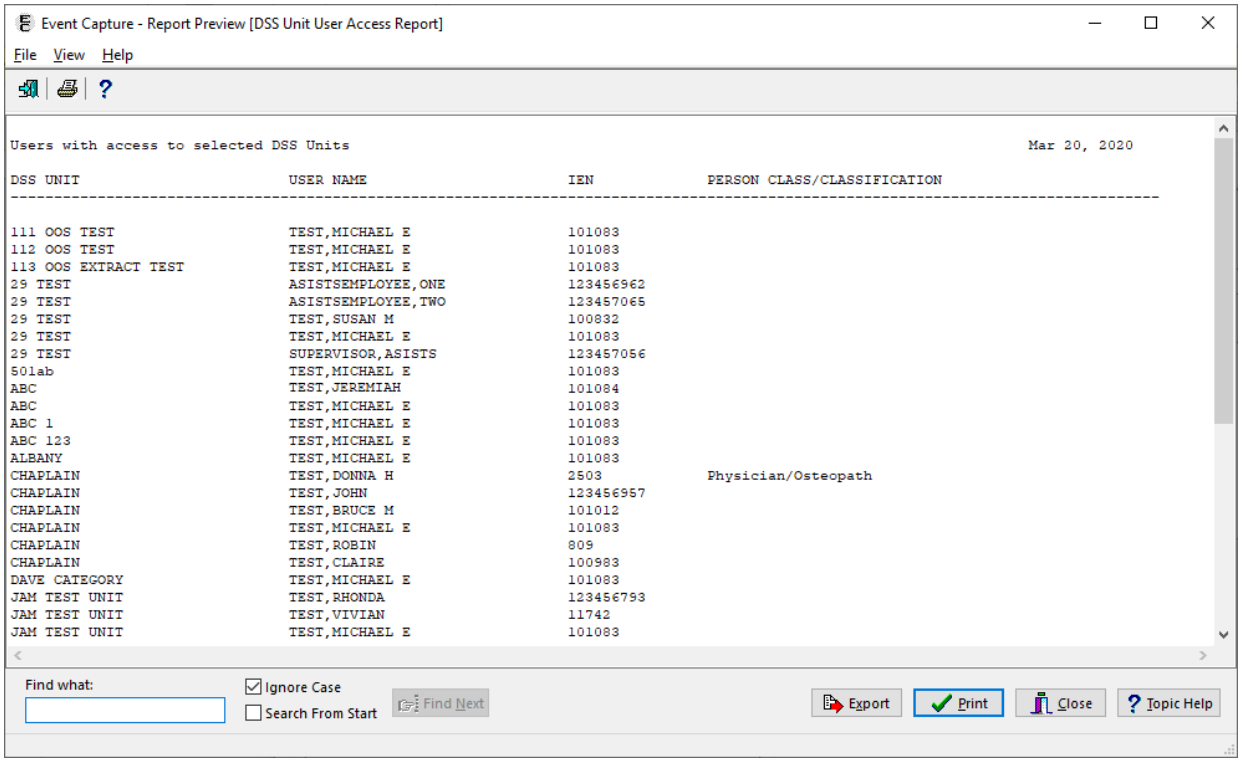
- When printing, the default printer is the device most recently used.

Figure 145: DSS Unit User Access Report Selection Criteria



The report preview produces output that includes DSS Unit Name, User Name, User IEN (from the New Person (#200) file), and Person Class/Classification (Figure 146). After previewing the report, the user has the option to export, print or close the report.

Figure 146: Report Preview — DSS Unit User Access Report

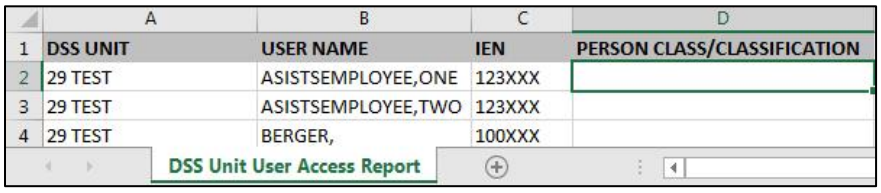


Users with access to selected DSS Units Mar 20, 2020

DSS UNIT	USER NAME	IEN	PERSON CLASS/CLASSIFICATION
111 OOS TEST	TEST,MICHAEL E	101083	
112 OOS TEST	TEST,MICHAEL E	101083	
113 OOS EXTRACT TEST	TEST,MICHAEL E	101083	
29 TEST	ASISTSEMPLOYEE,ONE	123456962	
29 TEST	ASISTSEMPLOYEE,TWO	123457065	
29 TEST	TEST,SUSAN M	100832	
29 TEST	TEST,MICHAEL E	101083	
29 TEST	SUPERVISOR,ASISTS	123457056	
501ab	TEST,MICHAEL E	101083	
ABC	TEST,JEREMIAH	101084	
ABC	TEST,MICHAEL E	101083	
ABC 1	TEST,MICHAEL E	101083	
ABC 123	TEST,MICHAEL E	101083	
ALBANY	TEST,MICHAEL E	101083	
CHAPLAIN	TEST,DONNA H	2503	Physician/Osteopath
CHAPLAIN	TEST,JOHN	123456957	
CHAPLAIN	TEST,BRUCE M	101012	
CHAPLAIN	TEST,MICHAEL E	101083	
CHAPLAIN	TEST,ROBIN	809	
CHAPLAIN	TEST,CLAIRE	100983	
DAVE CATEGORY	TEST,MICHAEL E	101083	
JAM TEST UNIT	TEST,RHONDA	123456793	
JAM TEST UNIT	TEST,VIVIAN	11742	
JAM TEST UNIT	TEST,MICHAEL E	101083	

This report is exportable into an Excel spreadsheet (Figure 147). The tab in Excel is titled “DSS Unit User Access Report” and includes the information for the selected criteria.

Figure 147: Export — DSS Unit User Access Report



	A	B	C	D
1	DSS UNIT	USER NAME	IEN	PERSON CLASS/CLASSIFICATION
2	29 TEST	ASISTSEMPLOYEE,ONE	123XXX	
3	29 TEST	ASISTSEMPLOYEE,TWO	123XXX	
4	29 TEST	BERGER,	100XXX	

DSS Unit User Access Report

4.3.2.6 Event Capture Edit Log Report

This report displays the Entered or Edited by Staff Name field, in addition to the Location, DSS Unit, Procedure, Date of Procedure, Patient Name, last 4 digits of Patient SSN and Provider Name.

The selection criteria include Date Range, Sort Method, Location, and DSS Unit(s). Refer to Figure 148 for an example of the report selection screen.

Step 1. Select Date Range.

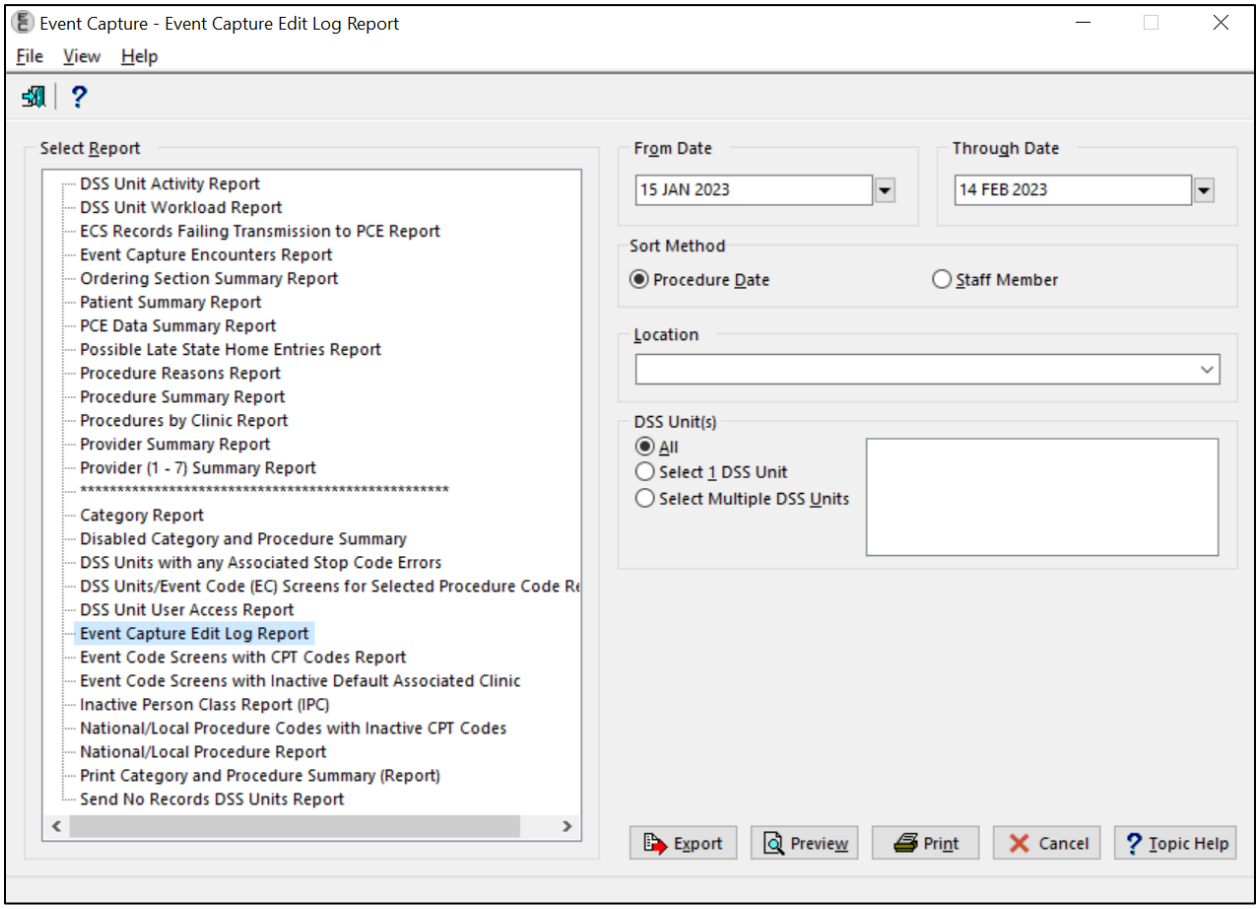
Step 2. Select Sort Method: Procedure Date or Staff Member.

Step 3. Select Location.

Step 4. Select One, Multiple, or All DSS Units.

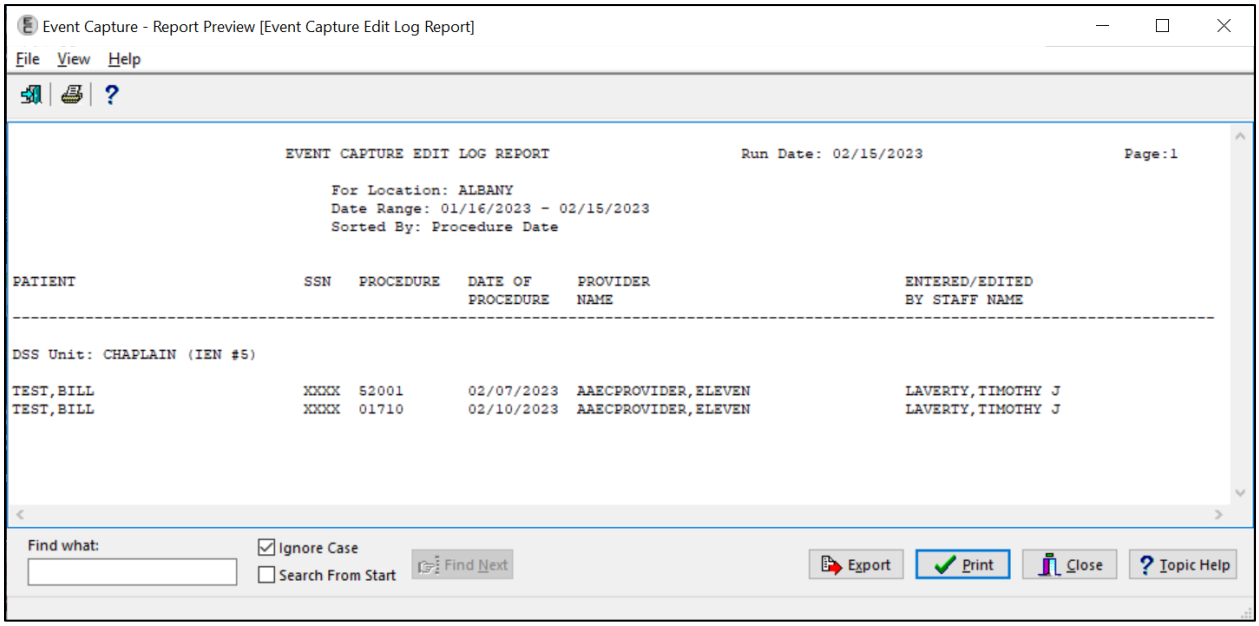
Step 5. Export, Preview, Print, or Cancel the report.

Figure 148: Event Capture Edit Log Report Selection Criteria



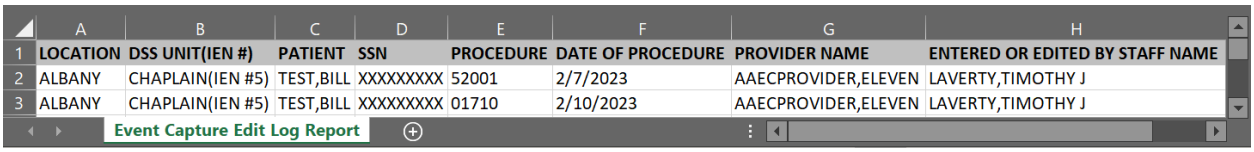
The Event Capture Edit Log Report output (Figure 149) is separated by DSS Unit and displays the Patient, last 4 digits of SSN, Procedure, Date of Procedure, Provider Name, and Entered/Edited by Staff Name fields.

Figure 149: Preview — Event Capture Edit Log Report



The exportable version of the Event Capture Edit Log Report (Figure 150) displays the Location, DSS Unit (IEN#), Patient, entire SSN, Procedure, Date of Procedure, Provider Name, and Entered or Edited by Staff Name fields.

Figure 150: Export – Event Capture Edit Log Report



	A	B	C	D	E	F	G	H
1	LOCATION	DSS UNIT(IEN #)	PATIENT	SSN	PROCEDURE	DATE OF PROCEDURE	PROVIDER NAME	ENTERED OR EDITED BY STAFF NAME
2	ALBANY	CHAPLAIN(IEN #5)	TEST,BILL	XXXXXXXXX	52001	2/7/2023	AAECPROVIDER,ELEVEN	LAVERTY,TIMOTHY J
3	ALBANY	CHAPLAIN(IEN #5)	TEST,BILL	XXXXXXXXX	01710	2/10/2023	AAECPROVIDER,ELEVEN	LAVERTY,TIMOTHY J

Event Capture Edit Log Report

4.3.2.7 Event Code Screens with CPT Codes Report

This option allows holders of the ECMGR key to print, preview, or export Event Code Screens with active and/or inactive CPT codes for one or all specific DSS Unit(s). Refer to Figure 151 for an example of the report selection screen.

Step 1. Select the report.

Step 2. Select One or all Location(s).

Step 3. Select one or all DSS Unit(s).

Note:

- If "All" is selected for the DSS Unit, the Category will also be set to "All" and will be disabled.

Step 4. Select a Category.

Note:

- Categories only appear if the Event Code Screen uses categories to group procedures.

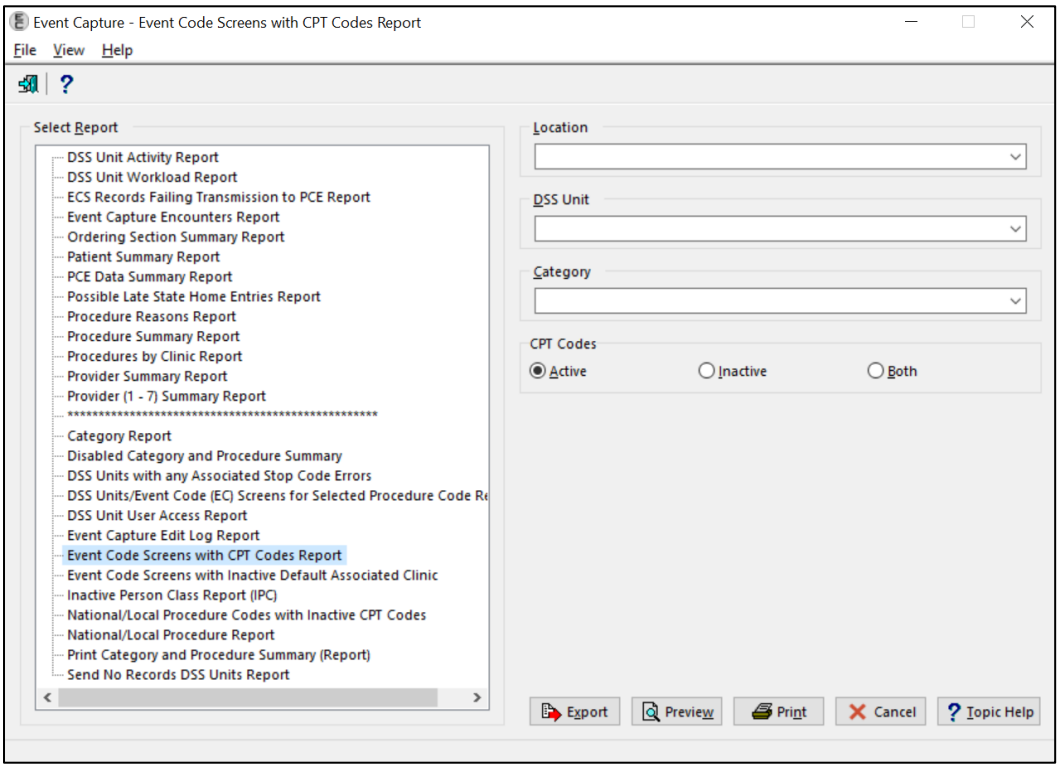
Step 5. Select Active, Inactive, or Both (Active and Inactive) CPT Codes.

Step 6. Export, Preview, Print, or Cancel the report.

Note:

- When printing, the default printer is the device most recently used.

Figure 151: Event Code Screens with CPT Codes Report Selection Criteria

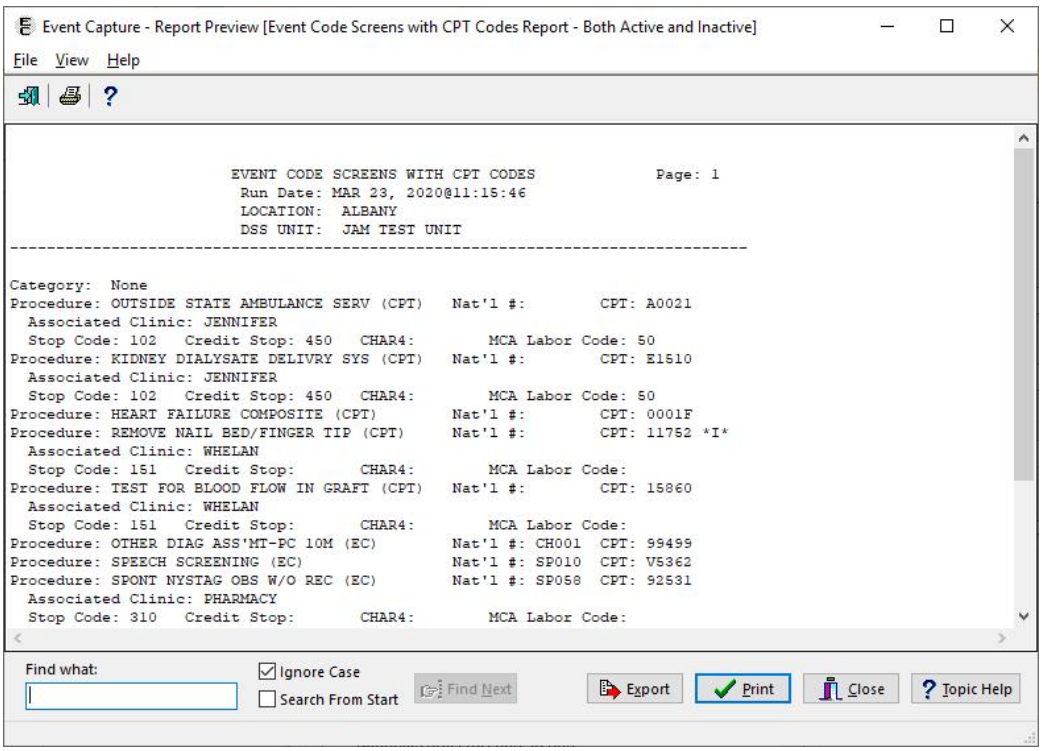


The report preview output includes Run Date and Time, Location, DSS Unit, Category, Procedure Name, National Number, CPT Code, Synonym, Associated Clinic, Stop Code, Credit Stop, CHAR4 Code and MCA Labor Code (Figure 152). After previewing the report, the user has the option to export, print or close the report.

Note:

- Inactive CPT codes are flagged with an *I* when printing both active and inactive codes.
- Category, Synonym, Associated Clinic and MCA Labor Code are included only when data is available for those items.

Figure 152: Preview — Event Code Screens with CPT Codes Report (Both Active and Inactive CPT Codes Selected)



This report is exportable into an Excel spreadsheet. The tab of the exported report indicates whether the report shows only active, only inactive, or both active and inactive CPT codes (Figure 153). When exporting the report, all Inactive CPT codes are flagged with an **Inactive** indicator.

Figure 153: Event Code Screens with CPT Codes Report from Export

LOCATION	DSS UNIT	CATEGORY	CPT CODE	PROCEDURE CODE	PROCEDURE NAME	SYNONYM	ASSOCIATED CLINIC	STOP CODE	CREDIT STOP	CHAR4	MCA LABOR CODE
ALBANY	JAM TEST UNIT	None	A0021		OUTSIDE STATE AMBULANCE SERV (CPT)		JENNIFER	102	450		50
ALBANY	JAM TEST UNIT	None	E1510		KIDNEY DIALYSATE DELIVRY SYS (CPT)		JENNIFER	102	450		50
ALBANY	JAM TEST UNIT	None	0001F		HEART FAILURE ASSESSED (CPT)						
ALBANY	JAM TEST UNIT	None	11752		REMOVE NAIL BED/FINGER TIP (CPT)		WHELAN	151			
ALBANY	JAM TEST UNIT	None	15860		TEST FOR BLOOD FLOW IN GRAFT (CPT)		WHELAN	151			
ALBANY	JAM TEST UNIT	None	99499	CH001	OTHER DIAG ASS'MT-PC 10M (EC)						
ALBANY	JAM TEST UNIT	None	V5362	SP010	SPEECH SCREENING (EC)						
ALBANY	JAM TEST UNIT	None	92531	SP058	SPONT NYSTAG OBS W/O REC (EC)		PHARMACY	310			
ALBANY	JAM TEST UNIT	None	36406		BL DRAW <3 YRS OTHER VEIN (CPT)	DGDFSG					
ALBANY	JAM TEST UNIT	None	86344		LEUKOCYTE PHAGOCYTOSIS (CPT)		JENNIFER	102	450		50
ALBANY	JAM TEST UNIT	None	99499		UNLISTED E&M SERVICE (CPT)	JAM	JENNIFER	102	450		50

Showing all records

4.3.2.8 Event Code Screens with Inactive Default Associated Clinic

The Event Code Screens with Inactive Default Associated Clinic report allows Management users to print, preview, or export inactive default associated clinic data for specified locations and DSS units. Refer to Figure 154 for an example of the report selection screen.

Step 1. Select the report.

Step 2. Select one, all, or multiple Location(s).

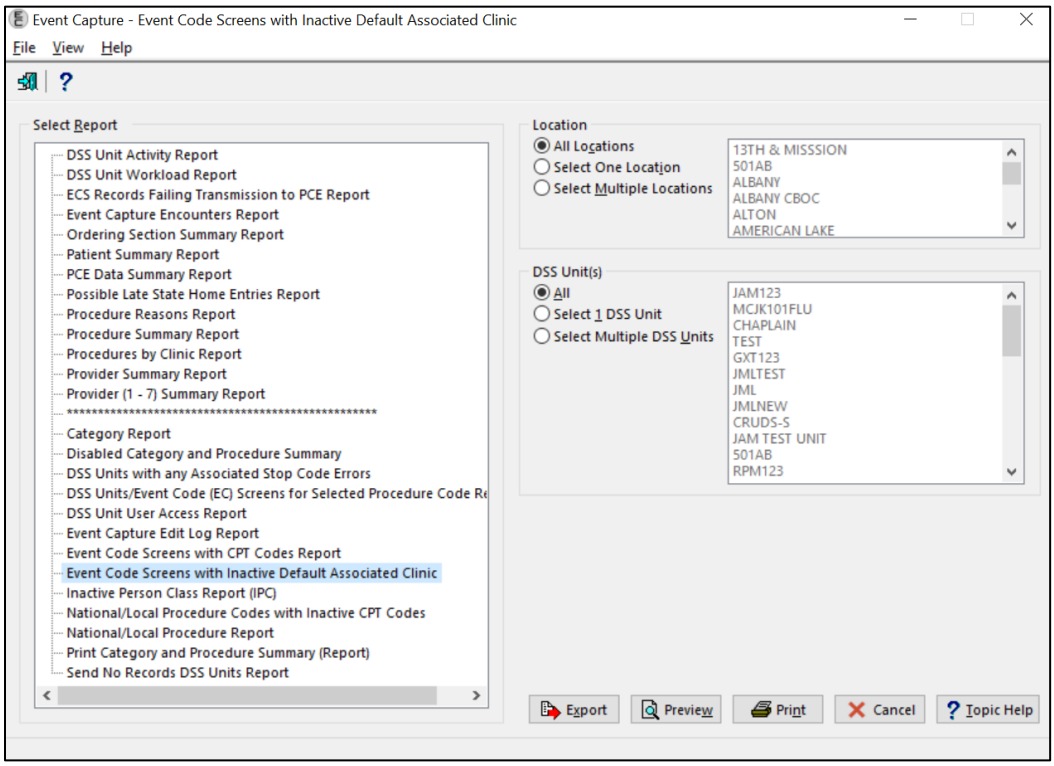
Step 3. Select one, all, or multiple DSS Unit(s).

Step 4. Export, Preview, Print, or Cancel the report.

Note:

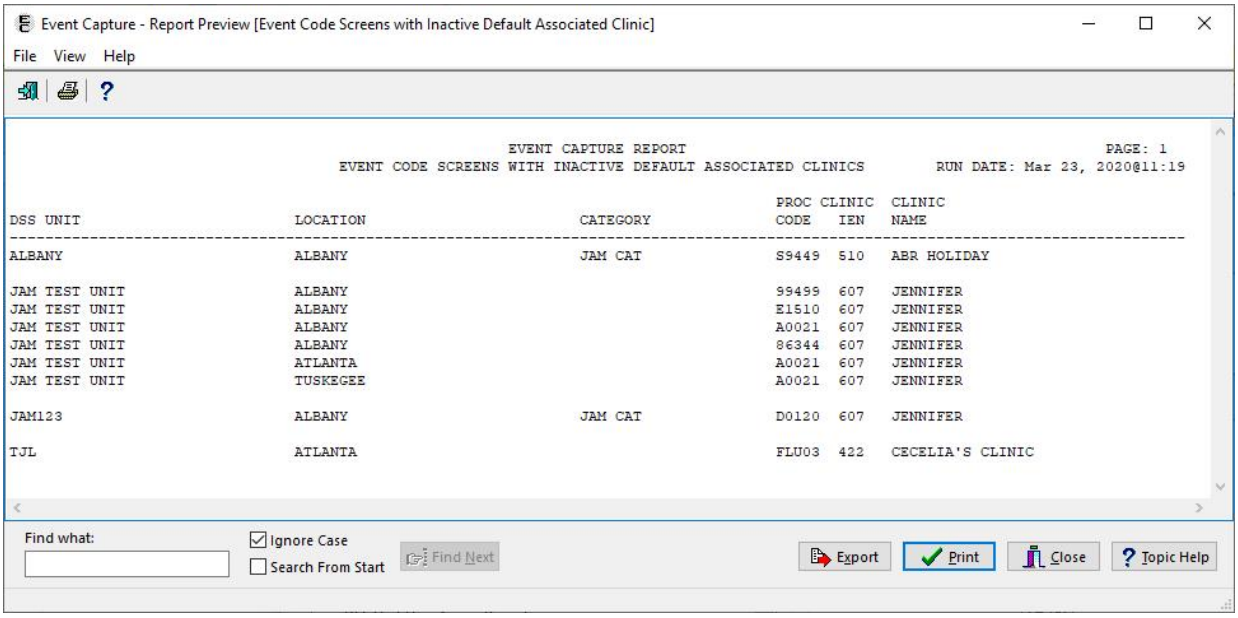
- When printing, the default printer is the device most recently used.

Figure 154: Event Code Screens with Inactive Default Associated Clinic Selection Criteria



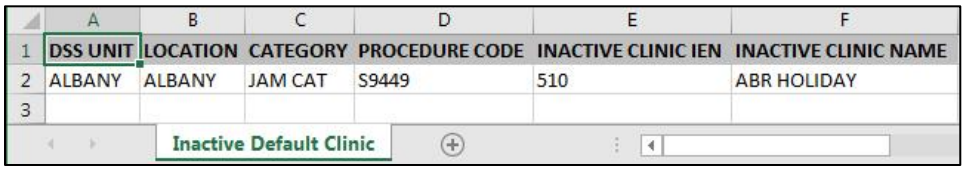
The report preview output includes DSS Unit Name, Location, Category, Procedure Code, Clinic IEN, and Clinic Name (Figure 155). After previewing the report, the user has the option to export, print or close the report.

Figure 155: Preview — Event Code Screens with Inactive Default Associated Clinic



The Export option produces the information for the selected criteria in Excel format (Figure 156).

Figure 156: Export — Event Code Screens with Inactive Default Associated Clinic



DSS UNIT	LOCATION	CATEGORY	PROCEDURE CODE	INACTIVE CLINIC IEN	INACTIVE CLINIC NAME
ALBANY	ALBANY	JAM CAT	S9449	510	ABR HOLIDAY

4.3.2.9 Inactive Person Class Report (IPC)

The Inactive Person Class Report (IPC) allows Management users to identify providers who do not have an assigned person class or an active person class in the NEW PERSON file (#200) for the date of the procedure. Refer to Figure 157 for an example of the report selection screen.

Step 1. Select the report.

Step 2. Enter a date range.

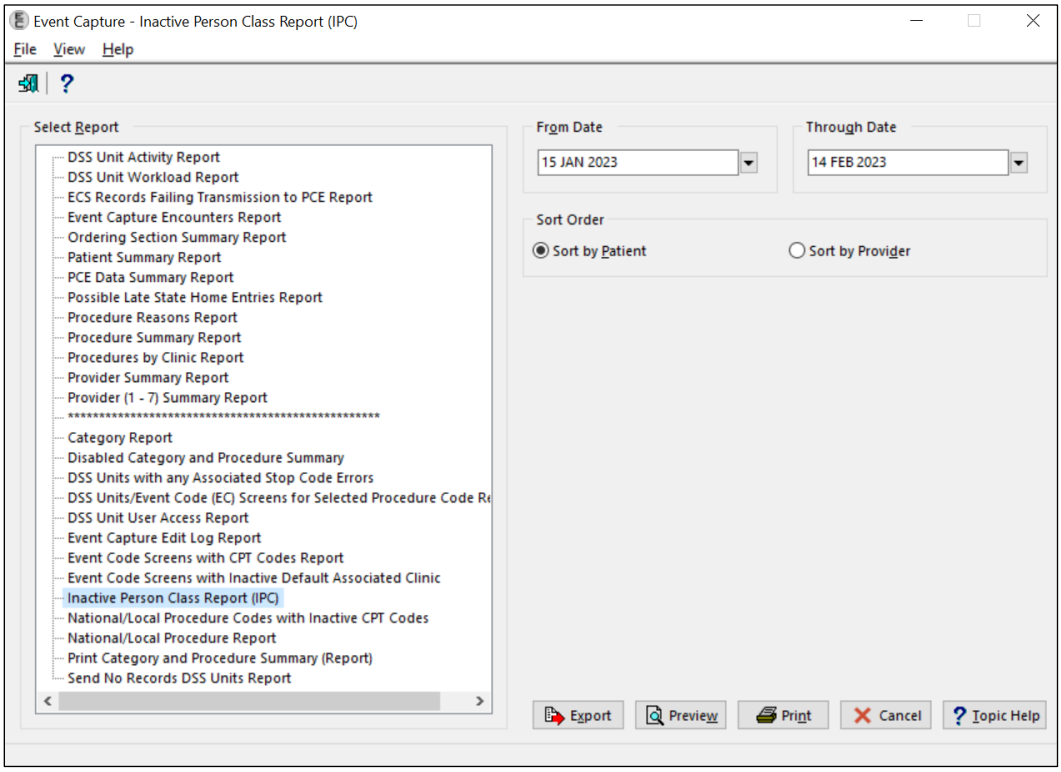
Step 3. Select Sort by Patient or Sort by Procedure.

Step 4. Export, Preview, Print, or Cancel the report.

Note:

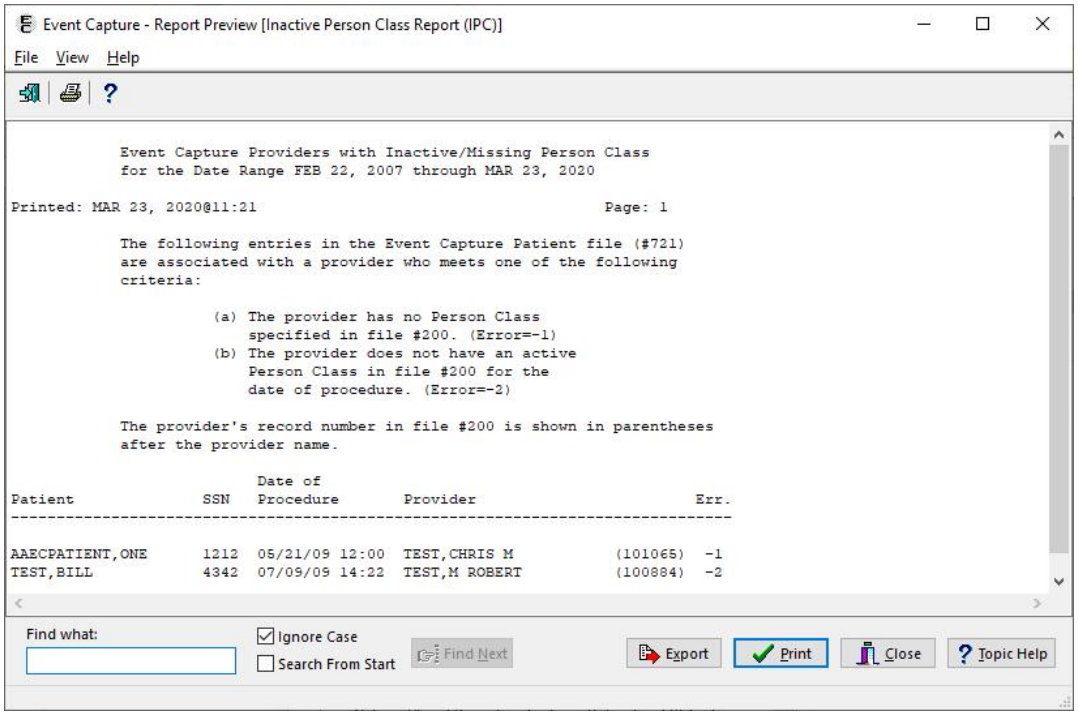
- When printing, the default printer is the device most recently used.

Figure 157: Inactive Person Class Report Selection Criteria



The report preview output displays the Patient Name, SSN (last four), Date of Procedure, Provider, and any Errors (Figure 158). After previewing the report, the user has the option to export, print or close the report.

Figure 158: Preview — Inactive Person Class Report

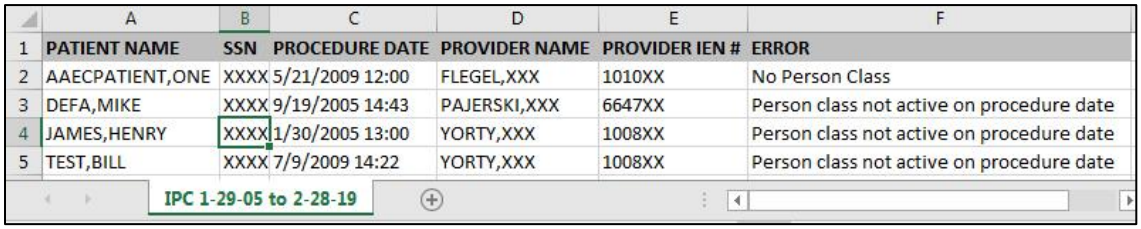


The Export option produces the information for the selected criteria in Excel format (Figure 159).

Note:

- The column order does not change with Sort Order when exported into Excel.

Figure 159: Export — Inactive Person Class Report



	A	B	C	D	E	F
1	PATIENT NAME	SSN	PROCEDURE DATE	PROVIDER NAME	PROVIDER IEN #	ERROR
2	AAECPATIENT,ONE	XXXX	5/21/2009 12:00	FLEGEL,XXX	1010XX	No Person Class
3	DEFA,MIKE	XXXX	9/19/2005 14:43	PAJERSKI,XXX	6647XX	Person class not active on procedure date
4	JAMES,HENRY	XXXX	1/30/2005 13:00	YORTY,XXX	1008XX	Person class not active on procedure date
5	TEST,BILL	XXXX	7/9/2009 14:22	YORTY,XXX	1008XX	Person class not active on procedure date

IPC 1-29-05 to 2-28-19

4.3.2.10 National/Local Procedure Codes with Inactive CPT Codes

This report allows Management users to see a list of National and Local Procedure Codes with inactive CPT codes from the EC NATIONAL PROCEDURE file (#725). Refer to Figure 160 for an example of the report selection screen.

Step 1. Select the report.

Step 2. Select the Preferred Report (National, Local, or Both)

Step 3. Select the Sort Method (Procedure Name, Procedure Number, CPT Code, or CPT Inactive Date)

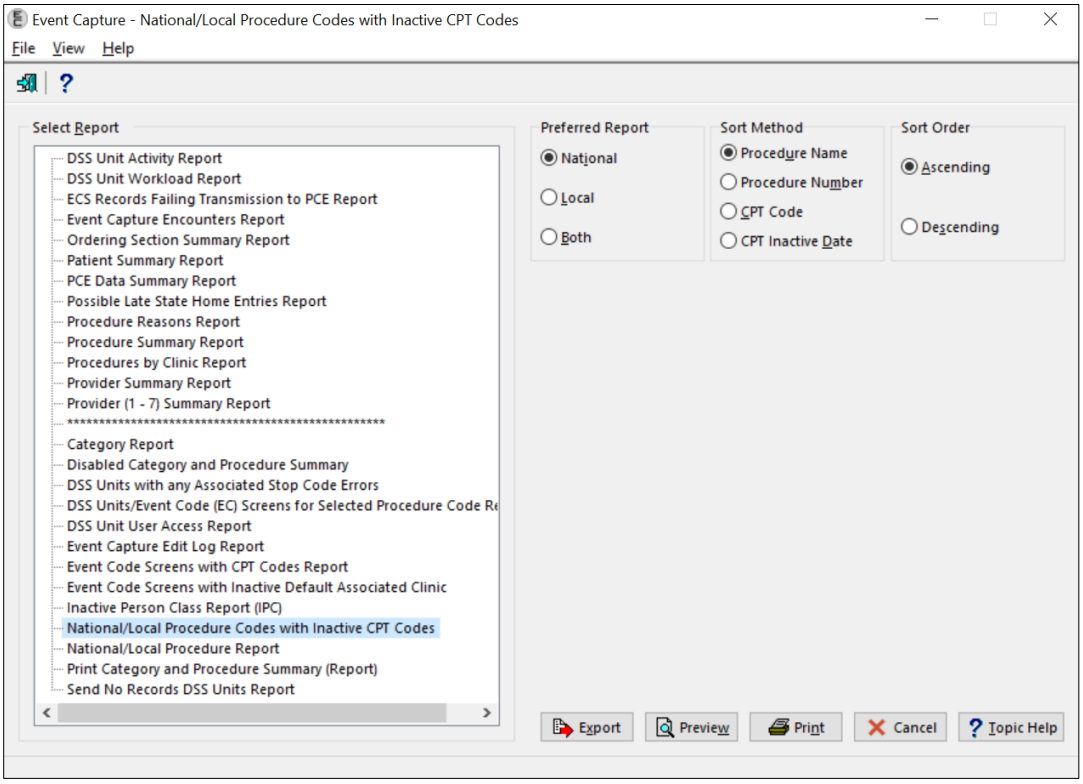
Step 4. Select the Sort Order (Ascending or Descending)

Step 5. Export, Preview, Print, or Cancel the report.

Note:

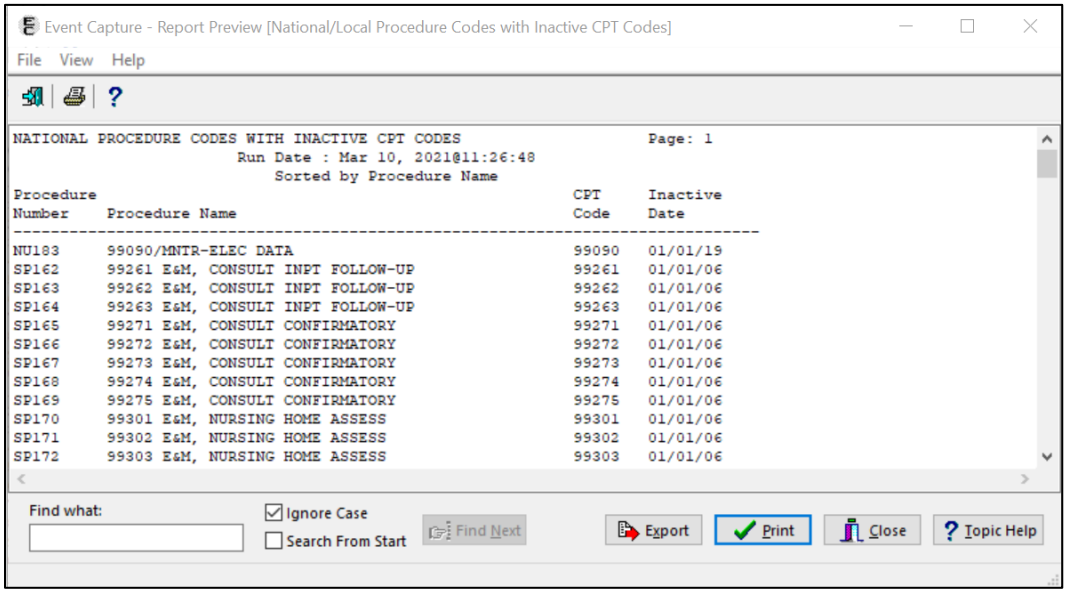
- When printing, the default printer is the device most recently used.

Figure 160: National/Local Procedure Codes with Inactive CPT Codes Selection Criteria



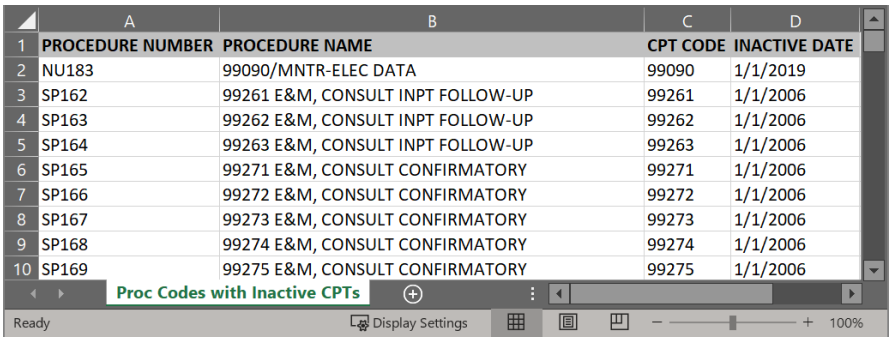
The report preview header displays the user's selected criteria (preferred report type and sort method), as well as the run date. The content of the report includes the Procedure Number, Procedure Name, CPT Code, and the Inactive Date (Figure 161). After previewing the report, the user has the option to export, print or close the report.

Figure 161: Report Preview — National/Local Procedure Codes with Inactive CPT Codes Report



The Export option produces the information for the selected criteria in Excel format (Figure 162).

Figure 162: Export — National/Local Procedure Codes with Inactive CPT Codes Report



	A	B	C	D
1	PROCEDURE NUMBER	PROCEDURE NAME	CPT CODE	INACTIVE DATE
2	NU183	99090/MNTR-ELEC DATA	99090	1/1/2019
3	SP162	99261 E&M, CONSULT INPT FOLLOW-UP	99261	1/1/2006
4	SP163	99262 E&M, CONSULT INPT FOLLOW-UP	99262	1/1/2006
5	SP164	99263 E&M, CONSULT INPT FOLLOW-UP	99263	1/1/2006
6	SP165	99271 E&M, CONSULT CONFIRMATORY	99271	1/1/2006
7	SP166	99272 E&M, CONSULT CONFIRMATORY	99272	1/1/2006
8	SP167	99273 E&M, CONSULT CONFIRMATORY	99273	1/1/2006
9	SP168	99274 E&M, CONSULT CONFIRMATORY	99274	1/1/2006
10	SP169	99275 E&M, CONSULT CONFIRMATORY	99275	1/1/2006

4.3.2.11 National/Local Procedure Report — Active Procedures

The National/Local Procedures Report allows Management users to display a listing of Event Capture active or inactive procedures (See section 4.3.2.12 for an overview of the report for Inactive Procedures). Refer to Figure 163 to view the report selection screen.

Note:

- Use the Procedure — Add or Update Local Procedures option to create local procedures before using this option.

Step 1. Select the report.

Step 2. Choose Active.

Step 3. Choose a Preferred Report (National, Local, or Both).

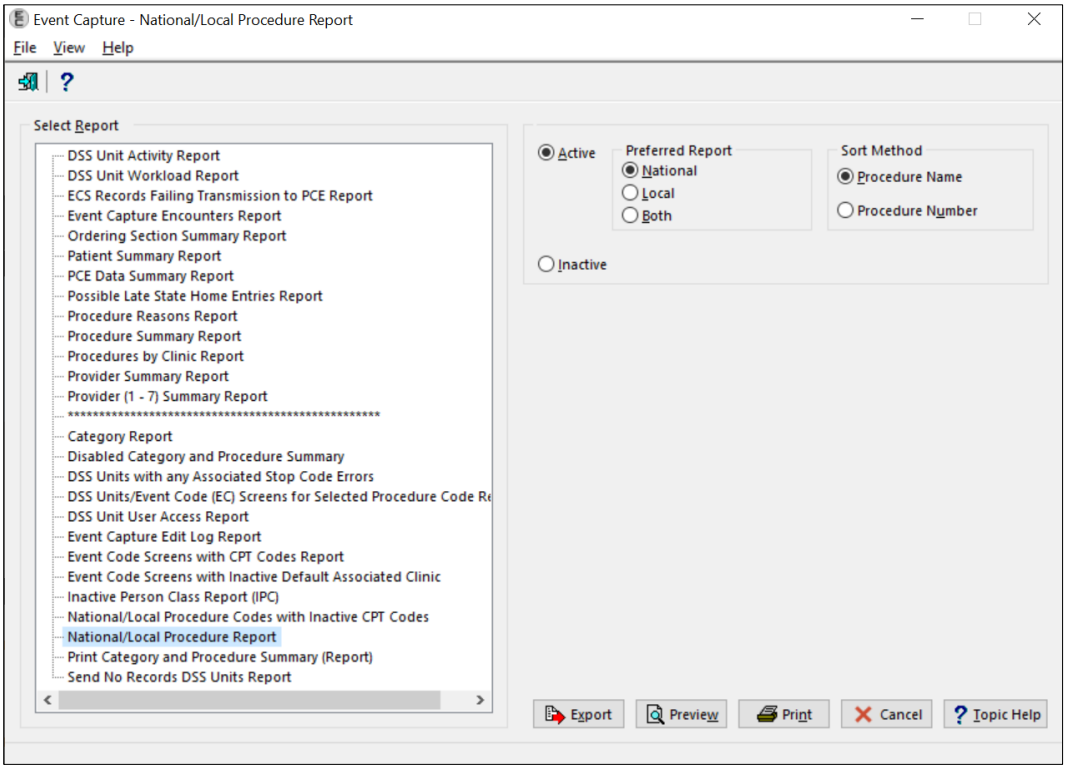
Step 4. Choose the Sort Method (Procedure Name or Procedure Number).

Step 5. Export, Preview, Print, or Cancel the report.

Note:

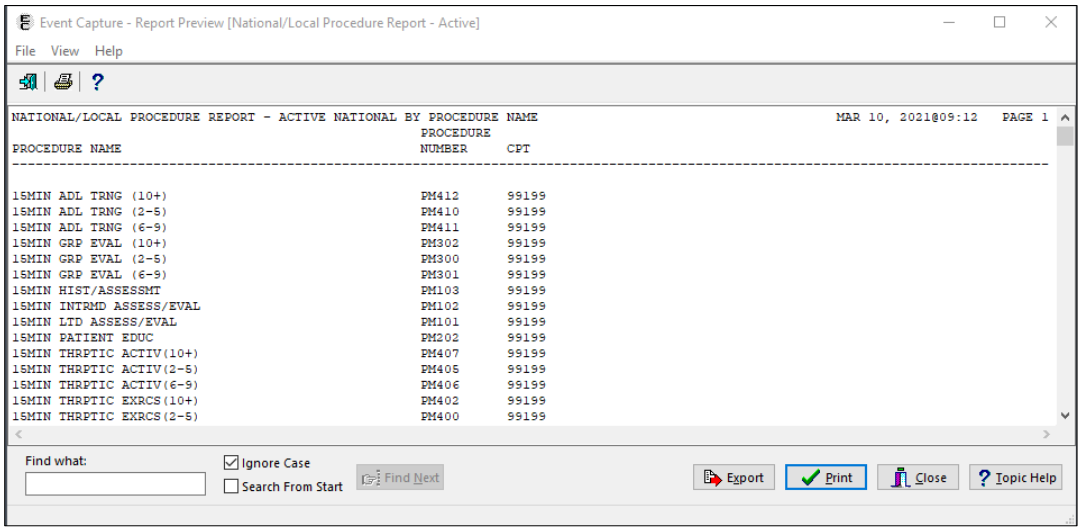
- When printing, the default printer is the device most recently used.

Figure 163: National/Local Procedure Report (Active) Selection Criteria



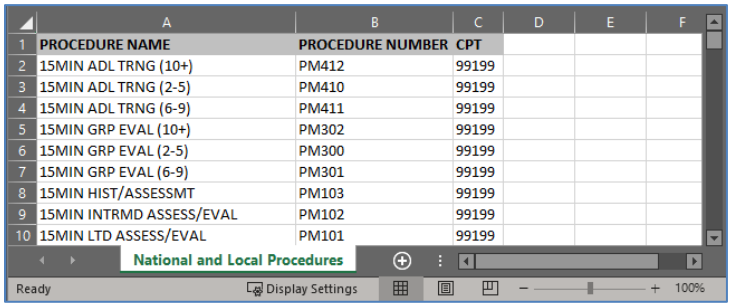
For active procedures, the report preview output includes the user's selected criteria (report type and sort method) in the header information. The report content includes the Procedure Name, Procedure Number, and CPT (Figure 164). After previewing the report, the user has the option to export, print or close the report.

Figure 164: Report Preview — National/Local Procedure Report (Active)



The Export option produces the information for the selected criteria in Excel format (Figure 165).

Figure 165: Export — National/Local Procedure Report (Active)



	A	B	C
1	PROCEDURE NAME	PROCEDURE NUMBER	CPT
2	15MIN ADL TRNG (10+)	PM412	99199
3	15MIN ADL TRNG (2-5)	PM410	99199
4	15MIN ADL TRNG (6-9)	PM411	99199
5	15MIN GRP EVAL (10+)	PM302	99199
6	15MIN GRP EVAL (2-5)	PM300	99199
7	15MIN GRP EVAL (6-9)	PM301	99199
8	15MIN HIST/ASSESSMT	PM103	99199
9	15MIN INTRMD ASSESS/EVAL	PM102	99199
10	15MIN LTD ASSESS/EVAL	PM101	99199

4.3.2.12 National/Local Procedure Report — Inactive Procedures

The National/Local Procedures Report allows Management users to display a listing of Event Capture active or inactive procedures (See section 4.3.2.11 for an overview of the report for Active Procedures). Refer to Figure 166 to view the report selection screen.

Note:

- Use the Procedure — Add or Update Local Procedures option to create local procedures before using this option.

Step 1. Select the report.

Step 2. Select Active or Inactive.

Note:

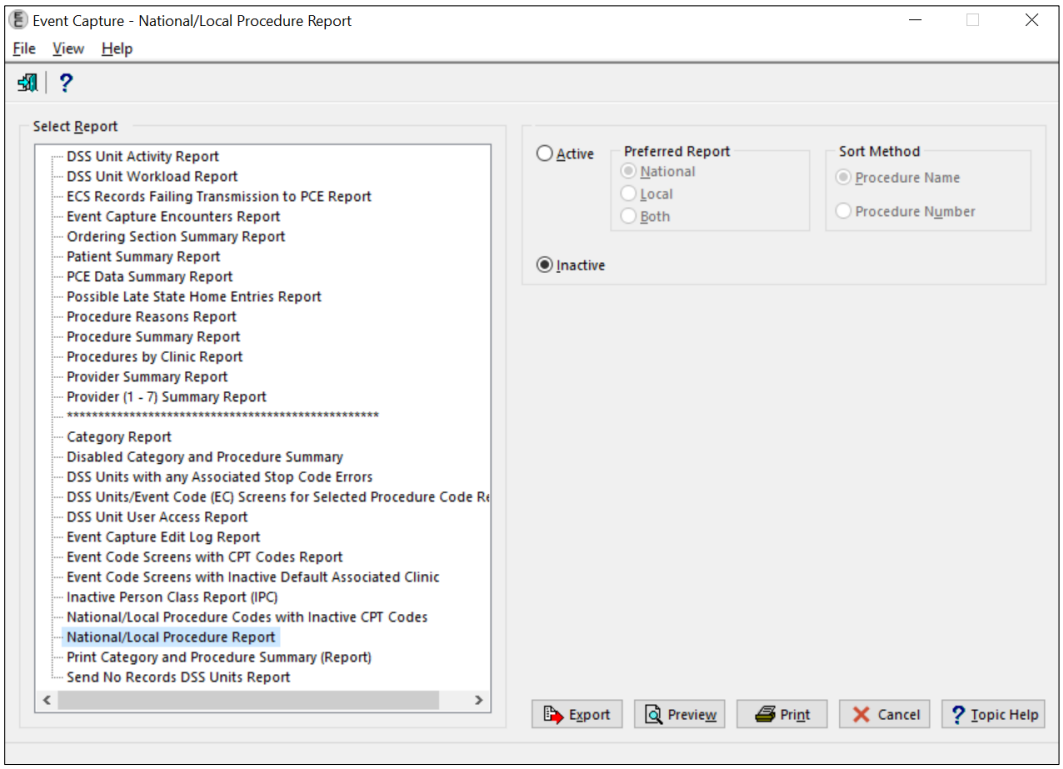
- Selecting the **Inactive** radio button disables the Preferred Report and Sort Method options.

Step 3. Export, Preview, Print, or Cancel the report.

Note:

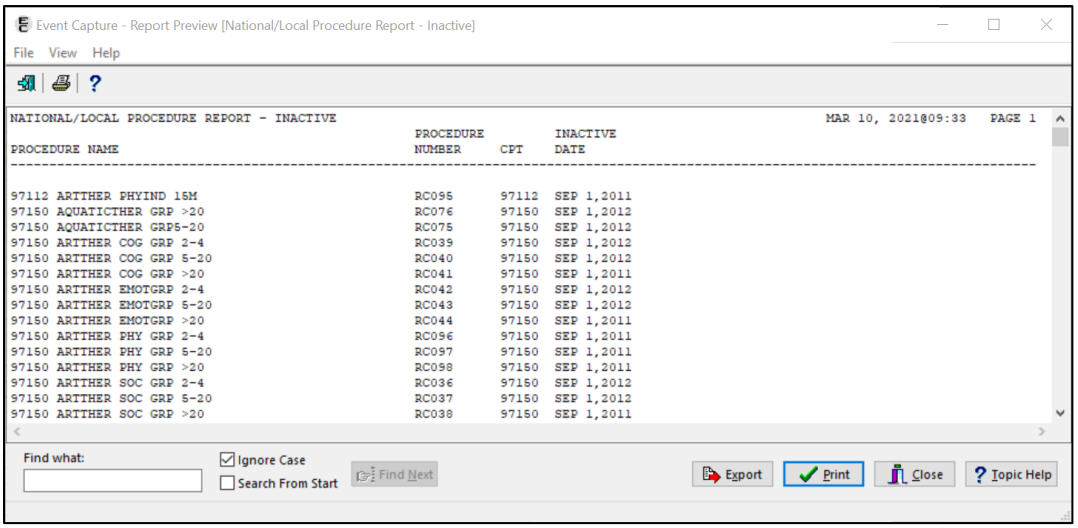
- When printing, the default printer is the device most recently used.

Figure 166: National/Local Procedure Report (Inactive) Selection Criteria



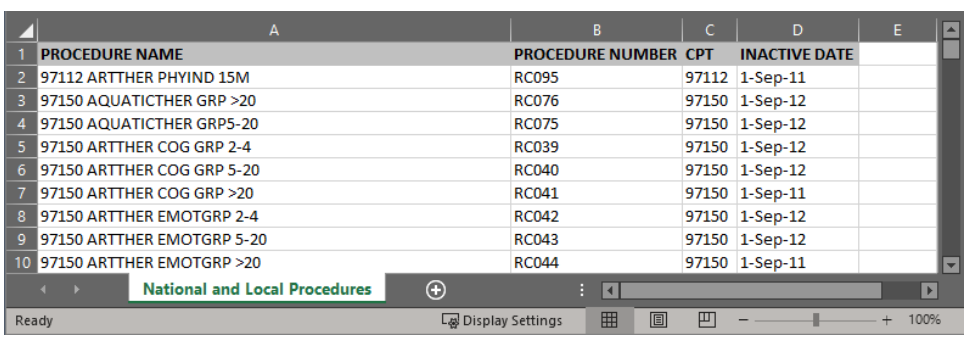
For inactive procedures, the report preview output includes Procedure Name, Procedure Number, CPT, and the Inactive Date (Figure 167). After previewing the report, the user has the option to export, print or close the report.

Figure 167: Preview — National/Local Procedure Report (Inactive)



The Export option produces the information for the selected criteria in Excel format (Figure 168).

Figure 168: Export — National/Local Procedure Report (Inactive)



	A	B	C	D	E
1	PROCEDURE NAME	PROCEDURE NUMBER	CPT	INACTIVE DATE	
2	97112 ARTTHER PHYIND 15M	RC095	97112	1-Sep-11	
3	97150 AQUATICTHER GRP >20	RC076	97150	1-Sep-12	
4	97150 AQUATICTHER GRP5-20	RC075	97150	1-Sep-12	
5	97150 ARTTHER COG GRP 2-4	RC039	97150	1-Sep-12	
6	97150 ARTTHER COG GRP 5-20	RC040	97150	1-Sep-12	
7	97150 ARTTHER COG GRP >20	RC041	97150	1-Sep-11	
8	97150 ARTTHER EMOTGRP 2-4	RC042	97150	1-Sep-12	
9	97150 ARTTHER EMOTGRP 5-20	RC043	97150	1-Sep-12	
10	97150 ARTTHER EMOTGRP >20	RC044	97150	1-Sep-11	

4.3.2.13 Print Category and Procedure Summary (Report)

The Print Category and Procedure Summary Report allows Management users to print, display, and export the Event Code Screens for one or all DSS Units within a specified location. Locations, DSS Units, local categories, and procedures must be defined before using this option. Refer to Figure 169 for an example of the report selection screen.

Note:

- Use the DSS Unit — Add or Update DSS Units option to create DSS Units categories before using this option.
- Use the Category — Add or Update Categories option to create categories before using this option.
- Use the Procedure — Add or Update Local Procedures option to create procedures before using this option.

Step 1. Select one or all Location(s).

Step 2. Select Active, Inactive or Both (Active and Inactive) DSS Units.

Step 3. Select one, all, or multiple DSS Unit(s).

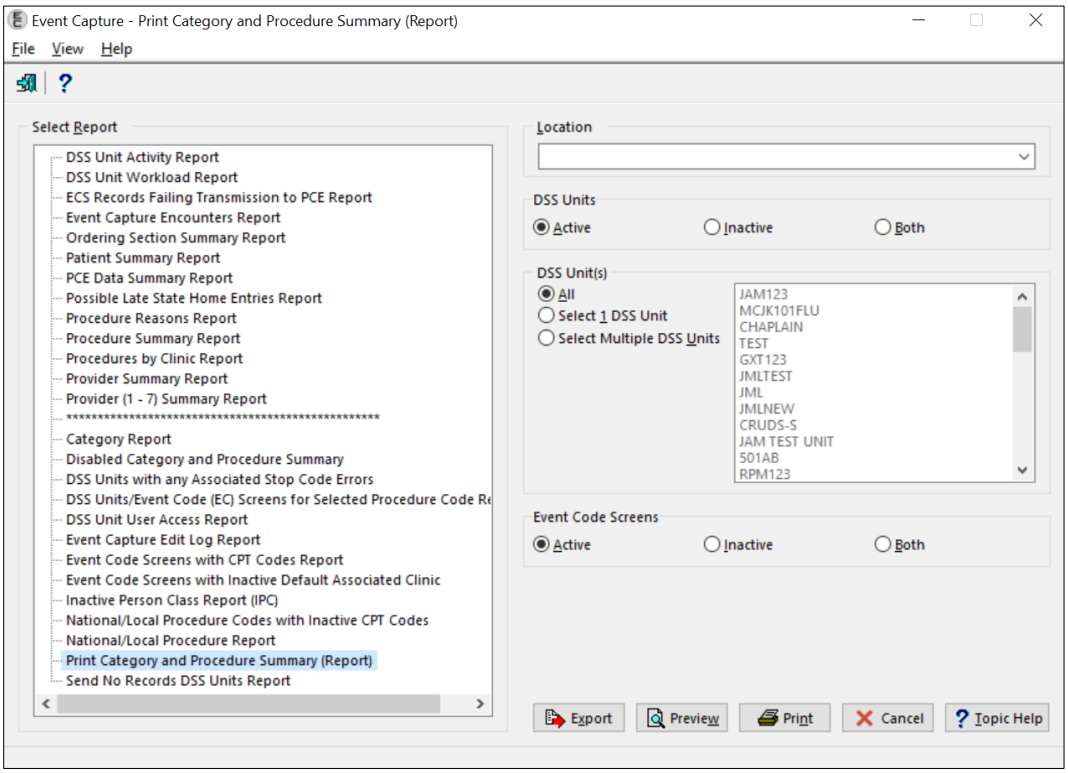
Step 4. Select Active, Inactive or Both (Active and Inactive) Event Code Screens.

Step 5. Export, Preview, Print or Cancel the report

Note:

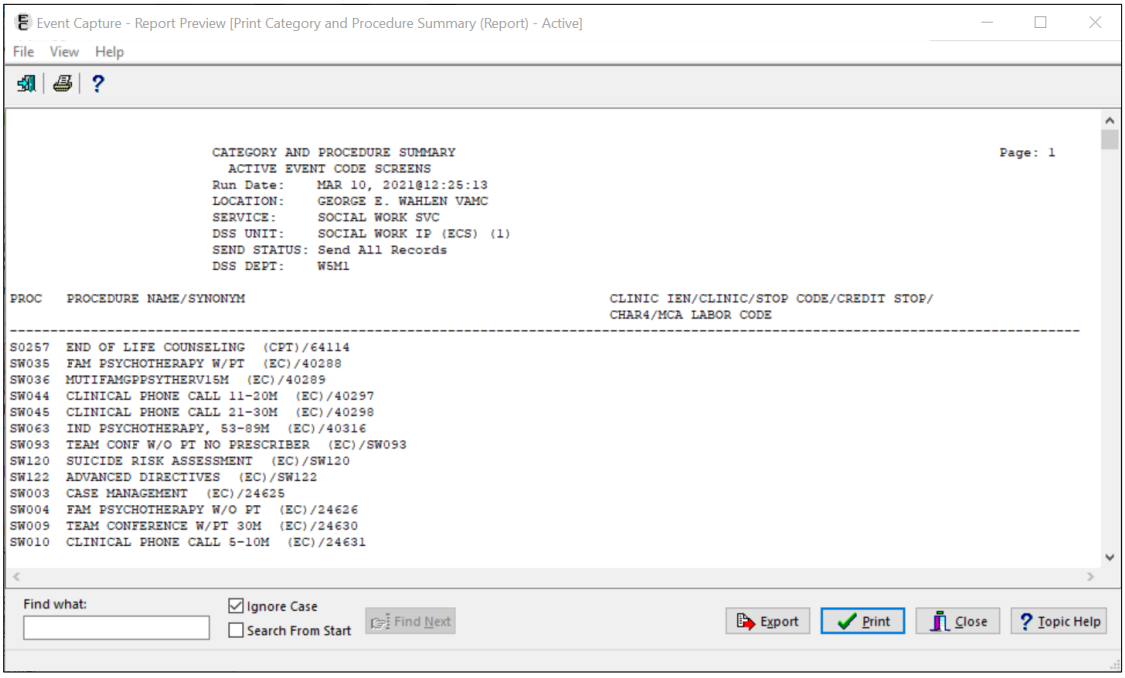
- When printing, the default printer is the device most recently used.

Figure 169: Print Category and Procedure Summary (Report) Selection Criteria



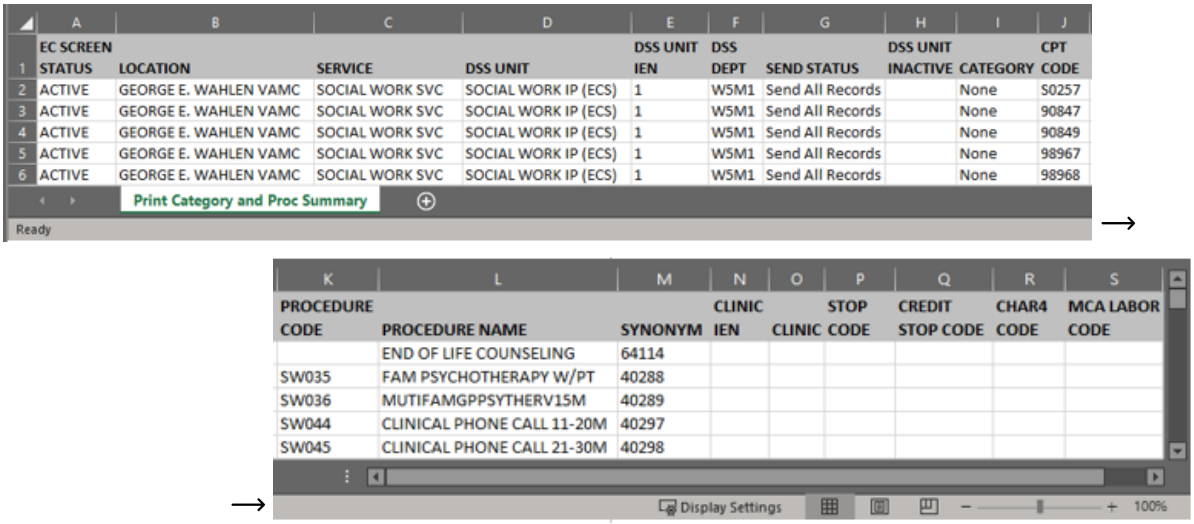
The report preview output includes Run Date, Location, Service, DSS Unit, Send Status, DSS Dept., Category (if applicable), Procedure Code, Procedure Name, Synonym, Associated Clinic IEN (if applicable), Associated Clinic (if applicable), Stop Code, Credit Stop Code, CHAR4 Code and MCA Labor Code (Figure 170). After previewing the report, the user has the option to export, print or close the report.

Figure 170: Report Preview — Print Category and Procedure Summary (Report)



The Export option produces the information for the selected criteria in Excel format (Figure 171).

Figure 171: Export — Print Category and Procedure Summary (Report)



	A	B	C	D	E	F	G	H	I	J
1	EC SCREEN STATUS	LOCATION	SERVICE	DSS UNIT	DSS UNIT IEN	DSS DEPT	SEND STATUS	DSS UNIT INACTIVE	CATEGORY	CPT CODE
2	ACTIVE	GEORGE E. WAHLEN VAMC	SOCIAL WORK SVC	SOCIAL WORK IP (ECS)	1	W5M1	Send All Records		None	S0257
3	ACTIVE	GEORGE E. WAHLEN VAMC	SOCIAL WORK SVC	SOCIAL WORK IP (ECS)	1	W5M1	Send All Records		None	90847
4	ACTIVE	GEORGE E. WAHLEN VAMC	SOCIAL WORK SVC	SOCIAL WORK IP (ECS)	1	W5M1	Send All Records		None	90849
5	ACTIVE	GEORGE E. WAHLEN VAMC	SOCIAL WORK SVC	SOCIAL WORK IP (ECS)	1	W5M1	Send All Records		None	98967
6	ACTIVE	GEORGE E. WAHLEN VAMC	SOCIAL WORK SVC	SOCIAL WORK IP (ECS)	1	W5M1	Send All Records		None	98968

Print Category and Proc Summary

Ready

K	L	M	N	O	P	Q	R	S
PROCEDURE CODE	PROCEDURE NAME	SYNONYM	CLINIC IEN	CLINIC	STOP CODE	CREDIT STOP CODE	CHAR4 CODE	MCA LABOR CODE
	END OF LIFE COUNSELING	64114						
SW035	FAM PSYCHOTHERAPY W/PT	40288						
SW036	MUTIFAMGPPSYTHERV15M	40289						
SW044	CLINICAL PHONE CALL 11-20M	40297						
SW045	CLINICAL PHONE CALL 21-30M	40298						

Display Settings 100%

4.3.2.14 Send No Records DSS Units Report

The Send No Records DSS Units Report provides Management users with a list of active DSS Units with send to PCE status of Send NO RECORDS. Refer to Figure 172 to view the report selection screen.

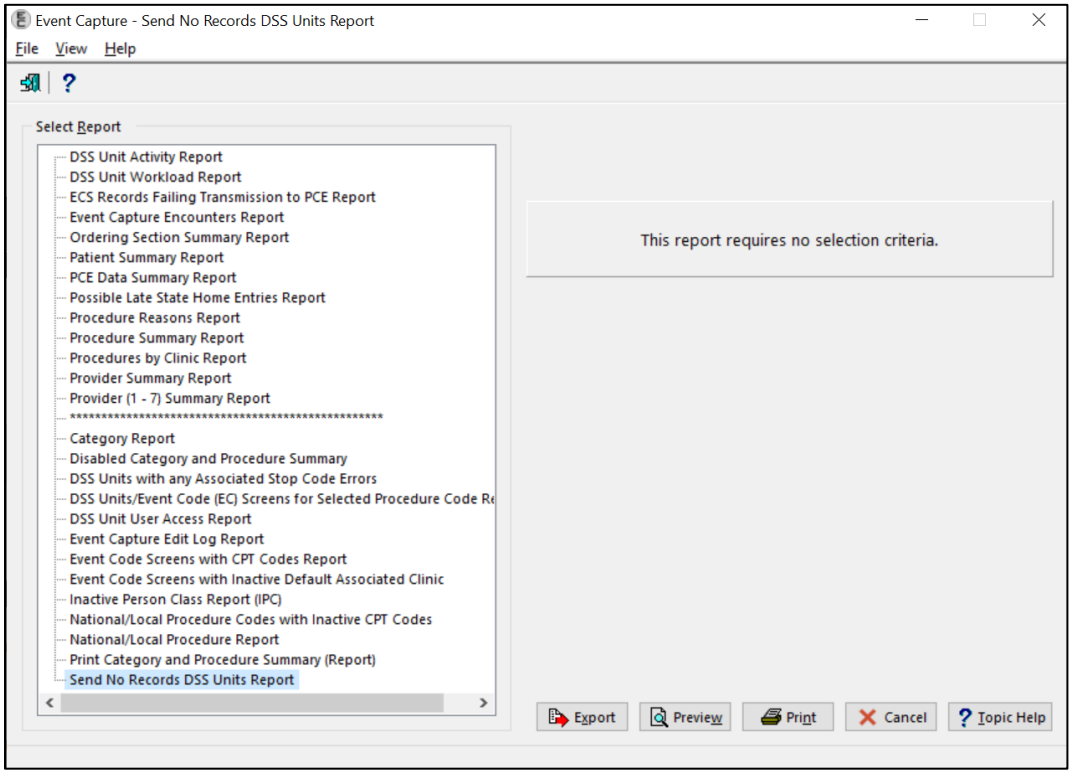
Step 1. Select the report.

Step 2. Export, Preview, Print, or Cancel the report.

Note:

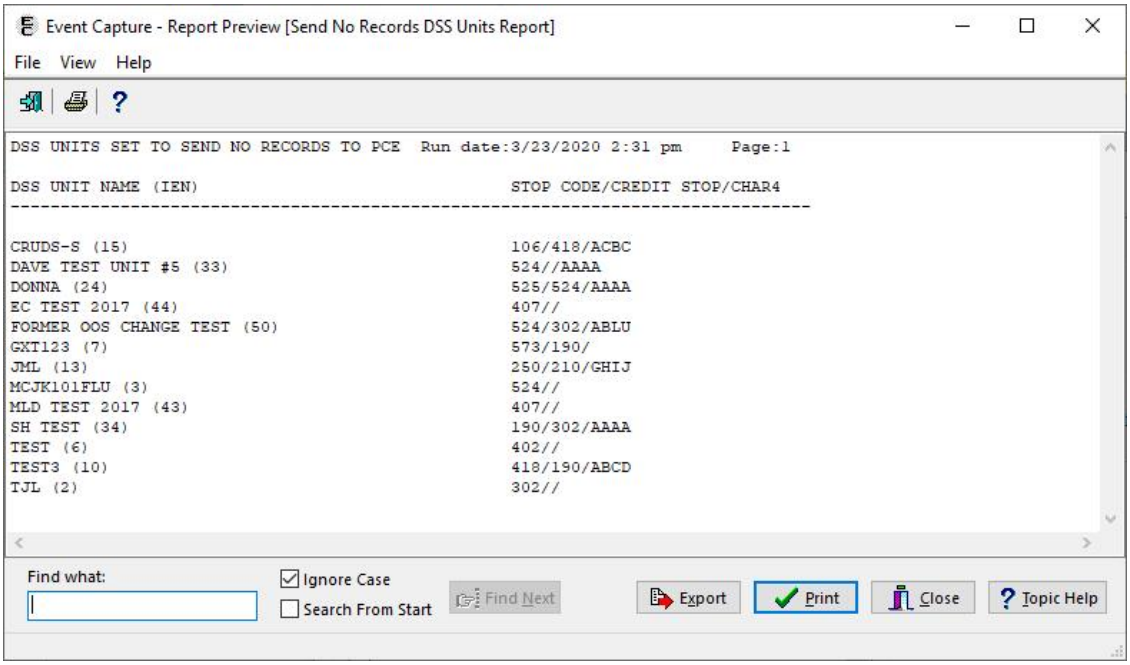
- When printing, the default printer is the device most recently used.

Figure 172: Send No Records DSS Units Report Required Fields



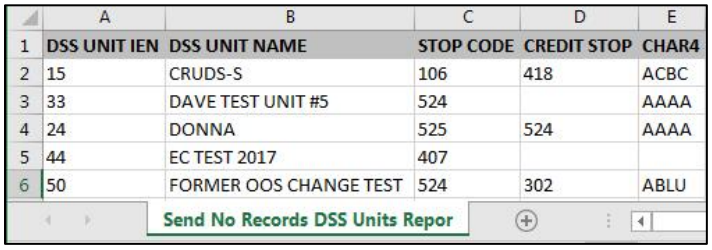
The report preview output includes DSS Unit Name and IEN, Associated Stop Code [and Credit Stop and CHAR4 Code if present] (Figure 173). After previewing the report, the user has the option to export, print or close the report.

Figure 173: Report Preview — Send No Records DSS Units Report



The Export option produces the information for the selected criteria in Excel format (Figure 174).

Figure 174: Export — Send No Records DSS Units Report



	A	B	C	D	E
1	DSS UNIT IEN	DSS UNIT NAME	STOP CODE	CREDIT STOP	CHAR4
2	15	CRUDS-S	106	418	ACBC
3	33	DAVE TEST UNIT #5	524		AAAA
4	24	DONNA	525	524	AAAA
5	44	EC TEST 2017	407		
6	50	FORMER OOS CHANGE TEST	524	302	ABLU

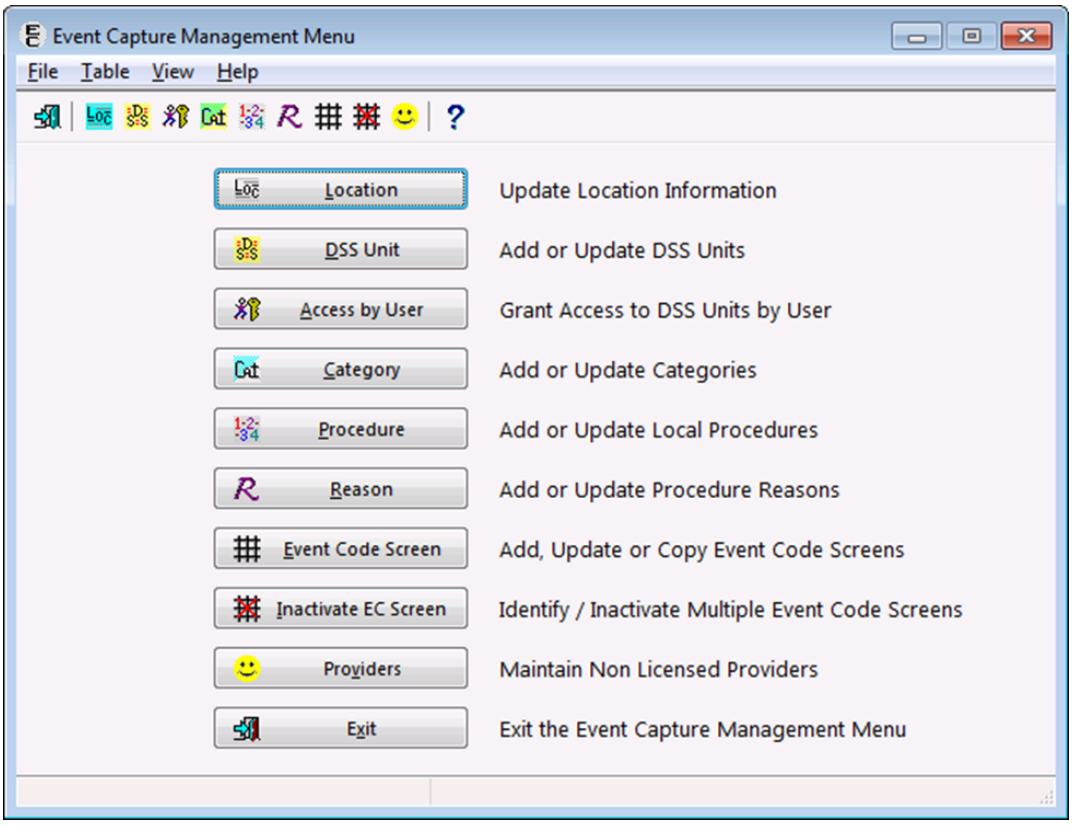
Send No Records DSS Units Repor

4.4 Management Menu

The Management Menu is available to users with the ECMGR security key. This option accesses the menus needed for management of the Event Capture software. The main menu in the Management Menu provides the following management functions (Figure 175):

- Location — Update Location Information
- DSS Unit — Add or Update DSS Units
- Access by User — Grant Access to DSS Units by User
- Category — Add or Update Categories
- Procedure — Add or Update Local Procedures
- Reason — Add or Update Procedure Reasons
- Event Code Screen — Add, Update or Copy Event Code Screens
- Inactivate EC Screen — Identify/Inactivate Multiple Event Code Screens
- Providers — Maintain Non-Licensed Providers

Figure 175: Event Capture Management Main Menu



4.4.1 Location — Update Location Information

The Location option allows Management users to create or remove access to an Event Capture location and flag it as active or inactive for use in the Event Capture software. When creating a location, the selection can be an individual facility or a division if the facility is multidivisional.

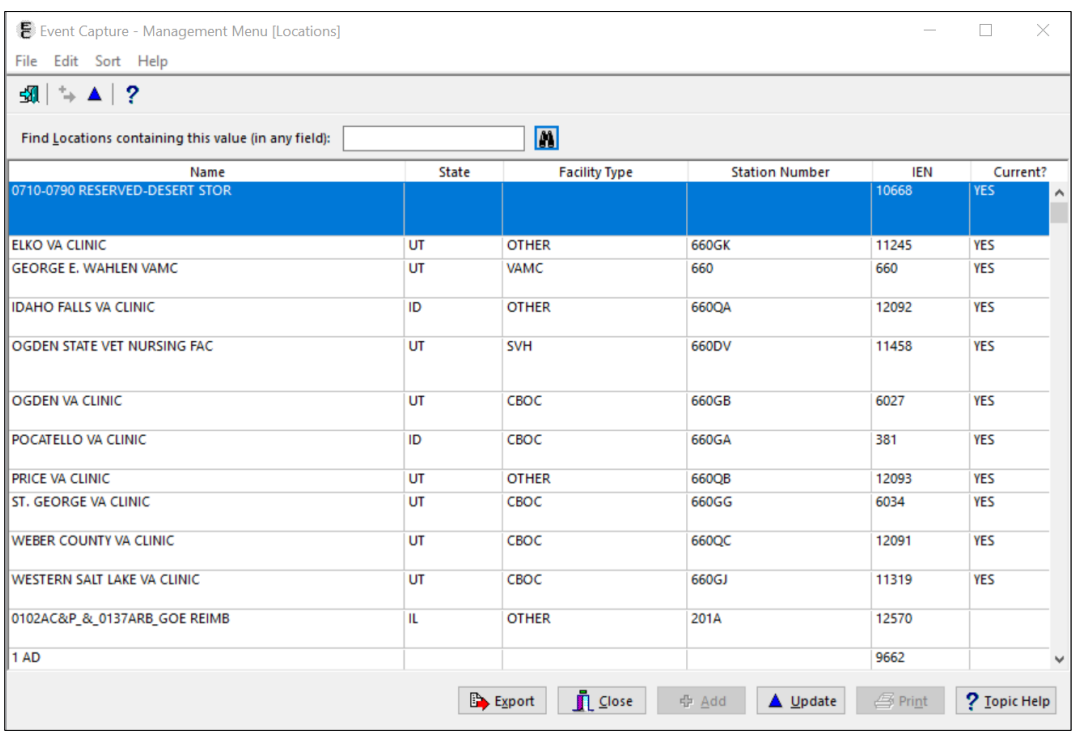
Before the User Starts

- Location selected must be in the INSTITUTION file (#4).
- Locations must be created with this option before the user can establish DSS Units. No further options are functional until the user creates an Event Capture location.

What the User Will See

- A list of existing locations displays in a grid format (Figure 176).
- For each location listed, the following information is displayed (if available): Name, State, Facility Type, Station Number, IEN, and whether this location is current.
  - The Name column contains the Location Name.
  - The Station Number corresponds to the first part (the characters before the dash) of the feeder location when there is no division suffix.
  - The IEN column contains the IEN of the INSTITUTION file (#4). The IEN corresponds to the first part (the characters before the dash) of the feeder location when there is a division suffix.
- A search field is available at the top of the screen, allowing the user to search for a specific location.

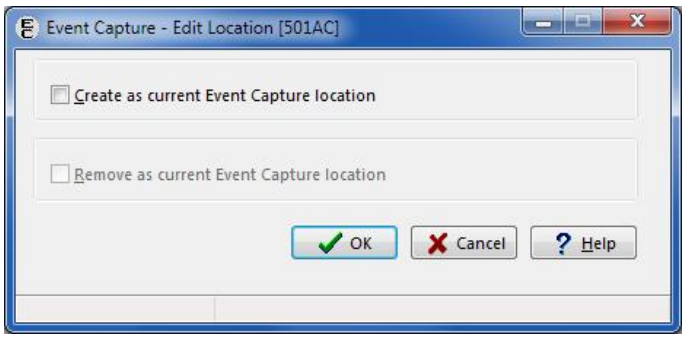
Figure 176: Management Menu [Locations] Screen



Name	State	Facility Type	Station Number	IEN	Current?
0710-0790 RESERVED-DESERT STOR				10668	YES
ELKO VA CLINIC	UT	OTHER	660GK	11245	YES
GEORGE E. WAHLEN VAMC	UT	VAMC	660	660	YES
IDAHO FALLS VA CLINIC	ID	OTHER	660QA	12092	YES
OGDEN STATE VET NURSING FAC	UT	SVH	660DV	11458	YES
OGDEN VA CLINIC	UT	CBOC	660GB	6027	YES
POCATELLO VA CLINIC	ID	CBOC	660GA	381	YES
PRICE VA CLINIC	UT	OTHER	660QB	12093	YES
ST. GEORGE VA CLINIC	UT	CBOC	660GG	6034	YES
WEBER COUNTY VA CLINIC	UT	CBOC	660QC	12091	YES
WESTERN SALT LAKE VA CLINIC	UT	CBOC	660GJ	11319	YES
0102AC&P_&_0137ARB_GOE REIMB	IL	OTHER	201A	12570	
1 AD				9662	

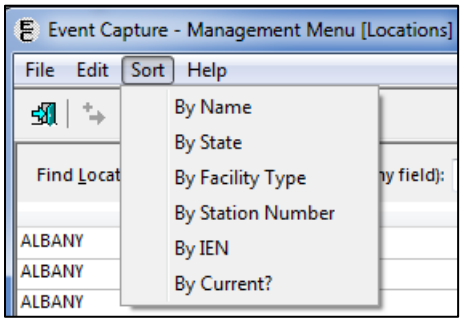
From the Locations screen, the user can select a location by double-clicking on a row or by highlighting a row and then clicking the **Update** button. After selecting a location, an edit screen appears, allowing the user to either create the location as a current Event Capture location or to remove the selected location (Figure 177).

Figure 177: Edit Location Screen



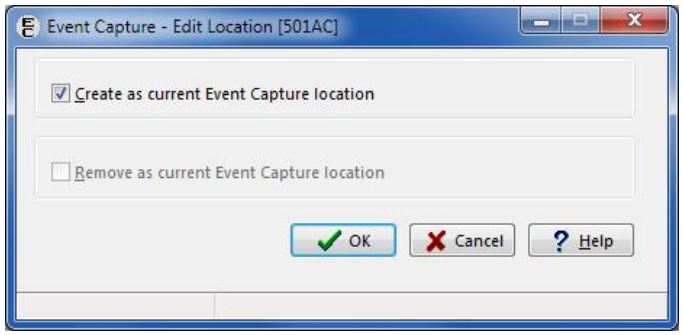
The rows within the Locations screen can be sorted by using the Sort menu (Figure 178) or by clicking on the column header. The default sort order will group locations based on whether they are current and lists the current locations group first. In addition, the default sort order lists the locations alphabetically within those groups.

Figure 178: Sort Location Menu Options



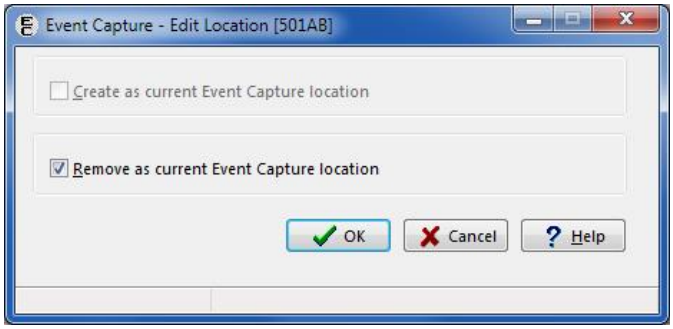
To create a current location, click the checkbox labeled “Create as current Event Capture location” and click the **OK** button (Figure 179). The location is “flagged” as active for use in the Event Capture software.

Figure 179: Creating a Current Location



To remove a current location, click the checkbox labeled “Remove as current Event Capture location” and click the **OK** button (Figure 180). The location is “flagged” as inactive for use in the Event Capture software.

Figure 180: Removing a Current Location



Click the **Export** button to export the Locations listing to Excel. The tab in Excel is titled “ECS Location Table Export” (Figure 181).

Figure 181: Export — ECS Location Table

	A	B	C	D	E	F
1	Name	State	Facility Type	Station Number	IEN	Current?
2	13TH & MISSSION	CA	D	662BU	17285	YES
3	1ALBANY	NY			1	
4	5001AC	NY			386	
5	500ABCD	MN			387	
6	500EKLUND	MN			388	
7	501AB				384	YES
8	501AC				385	
9	ABCE	DE			381	
10	ABILENE	KS	CBOC	677GC	17395	
11	ABILENE	KS	ORC	677HE	17402	
12	ABILENE	TX	ORC	519HA	16541	
13	ABILENE	TX	CBOC	519HC	16543	
14	ABRT1	NY	VAMC		16034	
15	AIR FORCE		USAF	381	16140	
16	AKRON	OH	CBOC	541GG	16692	
17	ALAMOGORDO	NM	CBOC	501GI	16460	

ECS Location Table Export | Sheet2 | Sheet3

4.4.2 DSS Units

This option allows you to add, edit, activate or inactivate DSS Units for use with Event Capture. Additionally, DSS Units without workload may be deleted. DSS Units typically represent the smallest identifiable work unit in a clinical service at the medical center and are defined by the VA Medical Centers (VAMCs).

A DSS Unit can represent any of the following:

- An entire service
- A section of a service
- A small section within a section
- A medical equipment item used in patient procedures

Before the User Starts

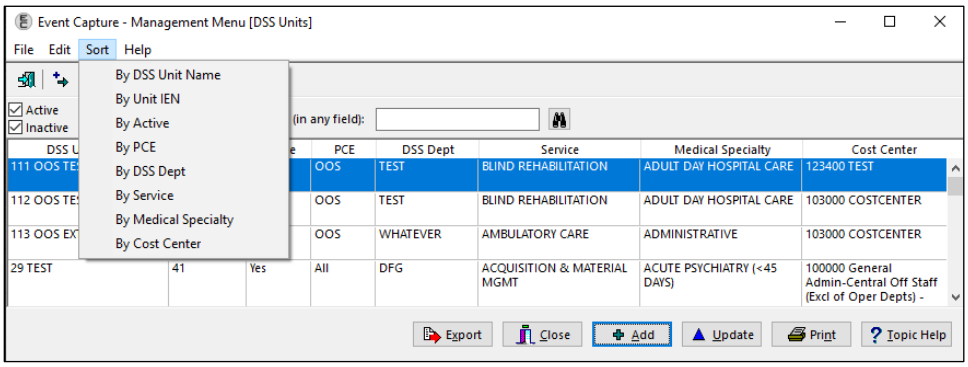
- Use the Location — Update Location Information option to create an Event Capture location before using this option.
- A prompt displays a notification to enter an Associated Stop Code only if the send "All Records" to PCE is set to NO.
- No further options are functional until DSS Units are created.

What the User Will See

- A list of DSS Units displays in table format.

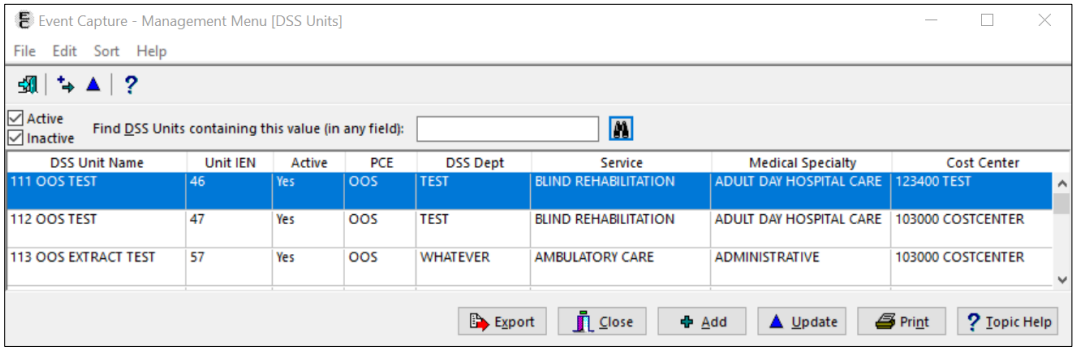
  The rows within the DSS Units table can be sorted by using the **Sort** drop-down menu (Figure 182) or by clicking on any column header. The default sort order will arrange DSS Unit Names alphabetically.

Figure 182: Sort DSS Units Menu Items



- A search field is available at the top of the screen, allowing the user to search for a specific DSS Unit. Options to search by "Active" or "Inactive" status are also available. Type in a partial search string, then click the **binoculars button** (Search) or hit **<Enter>**, to show entries meeting the search criteria.
- The screen contains the following columns:
  - **DSS Unit Name**
  - **Unit IEN** (becomes the end of the feeder location) — corresponds to the locally created Event Capture DSS Unit Name
  - **Active** — Status for DSS Unit (Yes or No)
  - **PCE** — Reflects if workload is set to pass to PCE. Values include:
    - All — Send all records
    - OOS — Send Occasion Of Service records
    - No — Send no records
  - **DSS Dept**
  - **Service**
  - **Medical Specialty**
  - **Cost Center**

Figure 183: Management Menu [DSS Units] Screen

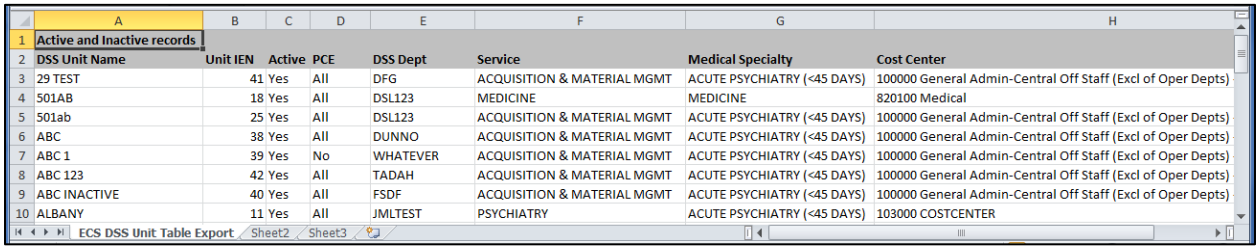


The **Print** button enables users to print the report.

The **Export** button enables users to export the data to an Excel spreadsheet (Figure 184).

Click the **Update** button to update an existing DSS Unit or click the **Add** button to add a new one. The Edit a DSS Unit or Add a DSS Unit screen will appear.

Figure 184: Export — DSS Units Table



Active and Inactive records							
DSS Unit Name	Unit IEN	Active	PCE	DSS Dept	Service	Medical Specialty	Cost Center
29 TEST	41	Yes	All	DFG	ACQUISITION & MATERIAL MGMT	ACUTE PSYCHIATRY (<45 DAYS)	100000 General Admin-Central Off Staff (Excl of Oper Depts)
501AB	18	Yes	All	DSL123	MEDICINE	MEDICINE	820100 Medical
501ab	25	Yes	All	DSL123	ACQUISITION & MATERIAL MGMT	ACUTE PSYCHIATRY (<45 DAYS)	100000 General Admin-Central Off Staff (Excl of Oper Depts)
ABC	38	Yes	All	DUNNO	ACQUISITION & MATERIAL MGMT	ACUTE PSYCHIATRY (<45 DAYS)	100000 General Admin-Central Off Staff (Excl of Oper Depts)
ABC 1	39	Yes	No	WHATEVER	ACQUISITION & MATERIAL MGMT	ACUTE PSYCHIATRY (<45 DAYS)	100000 General Admin-Central Off Staff (Excl of Oper Depts)
ABC 123	42	Yes	All	TADAH	ACQUISITION & MATERIAL MGMT	ACUTE PSYCHIATRY (<45 DAYS)	100000 General Admin-Central Off Staff (Excl of Oper Depts)
ABC INACTIVE	40	Yes	All	FSDF	ACQUISITION & MATERIAL MGMT	ACUTE PSYCHIATRY (<45 DAYS)	100000 General Admin-Central Off Staff (Excl of Oper Depts)
ALBANY	11	Yes	All	JMLTEST	PSYCHIATRY	ACUTE PSYCHIATRY (<45 DAYS)	103000 COSTCENTER

ECS DSS Unit Table Export / Sheet2 / Sheet3

Table 2 lists the element name and description for each field that appears on the Add or Edit DSS Unit screen:

Table 2: Element Name and Description

Element Name	Description
DSS Unit Name	The name of the DSS Unit being created
DSS Dept. and DSS Unit IEN	The value used to identify the DSS Department to which the DSS Unit is associated (1 to 14 characters). The same DSS Department can be used for more than one DSS Unit The DSS Unit IEN is a unique number assigned by the server, and is not editable in this screen
Service	The service associated with this DSS Unit — from the SERVICE/SECTION file (#49)
Medical Specialty	The medical specialty associated with this DSS Unit — from the MEDICAL SPECIALTY file (#723)
Cost Center	The cost center associated with this DSS Unit — from the COST CENTER file (#420.1). Cost centers are defined in MP4-Part V, Appendix B of the Fiscal Service cost manuals.
DSS Unit Status	Active — Lists Active Event Code Screens Inactive — Lists Inactive Event Code Screens

Element Name	Description
Event Code Screens	Inactivate — When an active DSS Unit is changed to inactive, all Event Code Screens within the DSS Unit are also inactivated. Reactivate — When an inactive DSS Unit is changed to active, its Event Code Screens can either be reactivated or remain inactive.
Default Date / Time	Now — The current date and time will populate during data entry None — No default date and time will be populated during data entry. The user is required to enter the date and time of the patient procedure.
Allow Category Use	Yes — Use categories to group procedures during data entry No — Do not use categories to group procedures during data entry
Allow Duplicate Override	Yes — Spreadsheet data for this DSS Unit can have duplicates overridden and uploaded No — Spreadsheet data for this DSS Unit will not allow duplicates to be overridden and uploaded
Send to PCE	Defines the method used to send the user's data to PCE for the DSS Unit being created. All Records — Send All Records No Records — Send No Records Occasion Of Service — For Occasion Of Service workload that is sent to PCE
Associated Stop Code	This option will only appear when "No Records" or "Occasion Of Service" is selected for Send to PCE. Select the Stop Code associated with this DSS Unit. Be sure to select an active Stop Code.
Credit Stop Code	This option will only appear when "No Records" is selected for Send to PCE, and an Associated Stop Code has been selected. Select the Credit Stop Code associated with this DSS Unit.
CHAR4 Code	This option will only appear when "No Records" is selected for Send to PCE, and an Associated Stop Code has been selected. Select the CHAR4 Code associated with this DSS Unit.

Note:

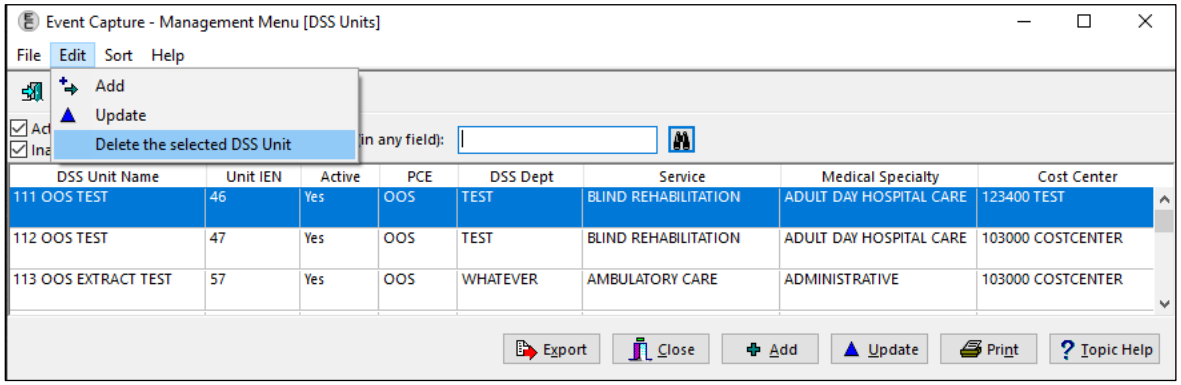
- On both Add DSS Unit and Edit DSS Unit screens, the DSS Unit Status defaults to Active, and the Allow Category Use field defaults to No, but the user can select Yes.
- The default value for Allow Duplicate Override is No.
- When the Send to PCE option is set to No Records or Occasion Of Service, the Associated Stop Code field is enabled.
- When the Send to PCE option is set to All Records, the Associated Stop Code field will not be visible. All other default options can be changed.
- The user can search for the Associated Stop Code by either description or code. The Associated Stop Code will display and will include both the description and the code.

4.4.2.1 Delete a DSS Unit

The **Edit** drop-down menu at the top of the DSS Units window (Figure 185) allows the user to delete an unused DSS Unit. If the user selects **Delete the selected DSS Unit** from the drop-down menu, the following prompt is displayed: "The selected DSS Unit will be deleted. Continue?". If "Yes" is selected, the system will check for any workload on the DSS Unit and its associated Event Code Screens.

- If there is workload on the selected DSS Unit, then the DSS Unit will not be deleted.
- If there is no workload on the selected DSS Unit, then the DSS Unit and its associated Event Code Screens will be deleted.

Figure 185: Edit DSS Units Menu



Note:

- The VA MailMan service will send an automated message to the user listing the DSS Unit that has been deleted. An example of this message can be seen in Appendix C.

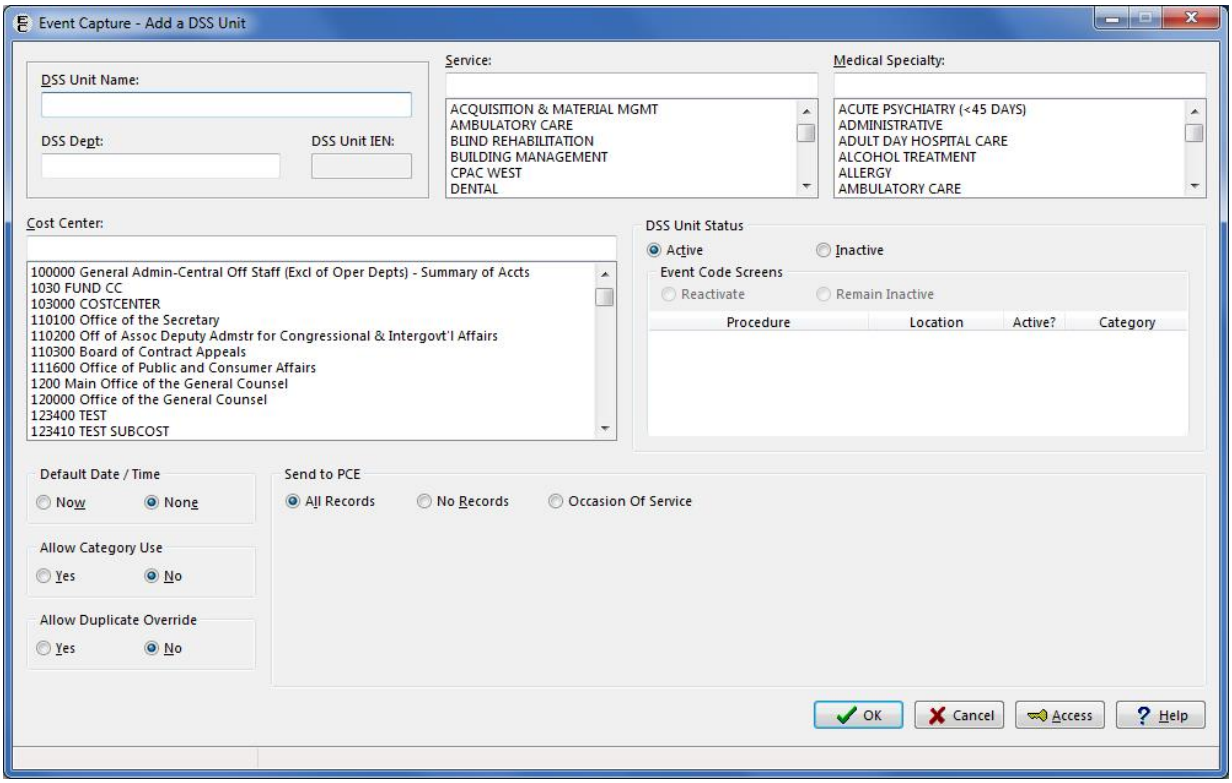
4.4.2.2 Add a DSS Unit

The Add a DSS Unit function allows the user to create a new DSS Unit within ECS.

Step 1. Click the Add button.

- The Add a DSS Unit Screen will display (Figure 186).

Figure 186: Add a DSS Unit Screen



Step 2. Enter a DSS Unit Name.

Step 3. Enter a DSS Dept.

Step 4. Select a Service from the list provided.

Step 5. Select a Medical Specialty from the list provided.

Step 6. Select a Cost Center from the list provided.

Step 7. Select the DSS Unit Status to Active or Inactive.

Step 8. Choose the Default Date / Time.

Step 9. Choose whether to Allow Category Use.

- A site may choose to use Categories to group procedures when entering data. Allowing category use does not mean Categories are required, but merely gives the site the option to use Categories. Setting this flag to "No" will not allow the site to use Categories when creating an Event Code Screen.

Step 10. Choose whether to Allow Duplicate Override.

Step 11. Choose the appropriate Send to PCE option: All Records, No Records, or Occasion Of Service.

Note

- When the Send to PCE option is set to All Records, the Associated Stop Code field will not be visible.
- When the Send to PCE option is set to No Records or Occasion Of Service, the Associated Stop Code field will be visible.
- Credit Stop Code and CHAR4 Code fields will be visible when an Associated Stop Code is selected.

Step 12. When the Send to PCE selection is set to No Records, then (Figure 187):

- An Associated Stop Code is required to be entered for the DSS Unit during setup.
- A Credit Stop Code may be added.
- A CHAR4 Code may be added.

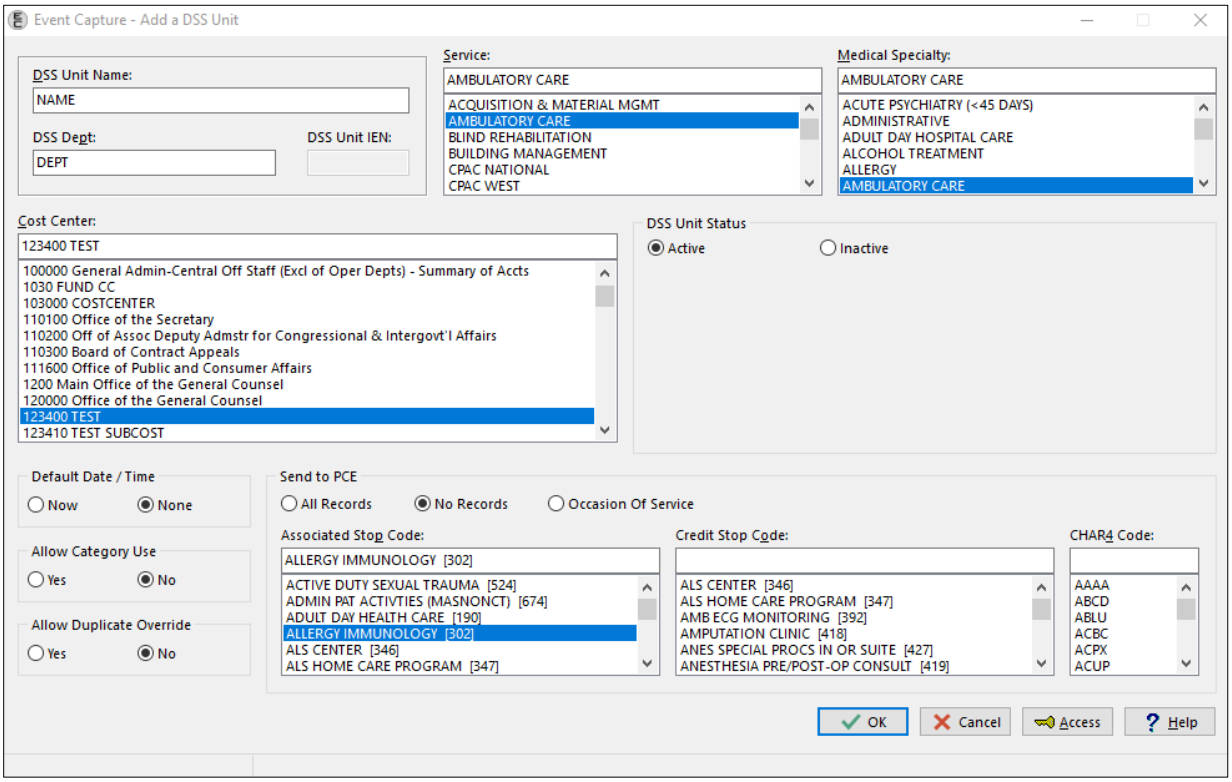
Step 13. When the Send to PCE selection is set to Occasion Of Service, then:

- An Associated Stop Code is required to be entered for the DSS Unit during setup.

Step 14. Assign access to the DSS Unit.

Step 15. Click the OK button when selections are complete.

Figure 187: Add a DSS Unit — Send to PCE with No Records



4.4.2.3 Update a DSS Unit

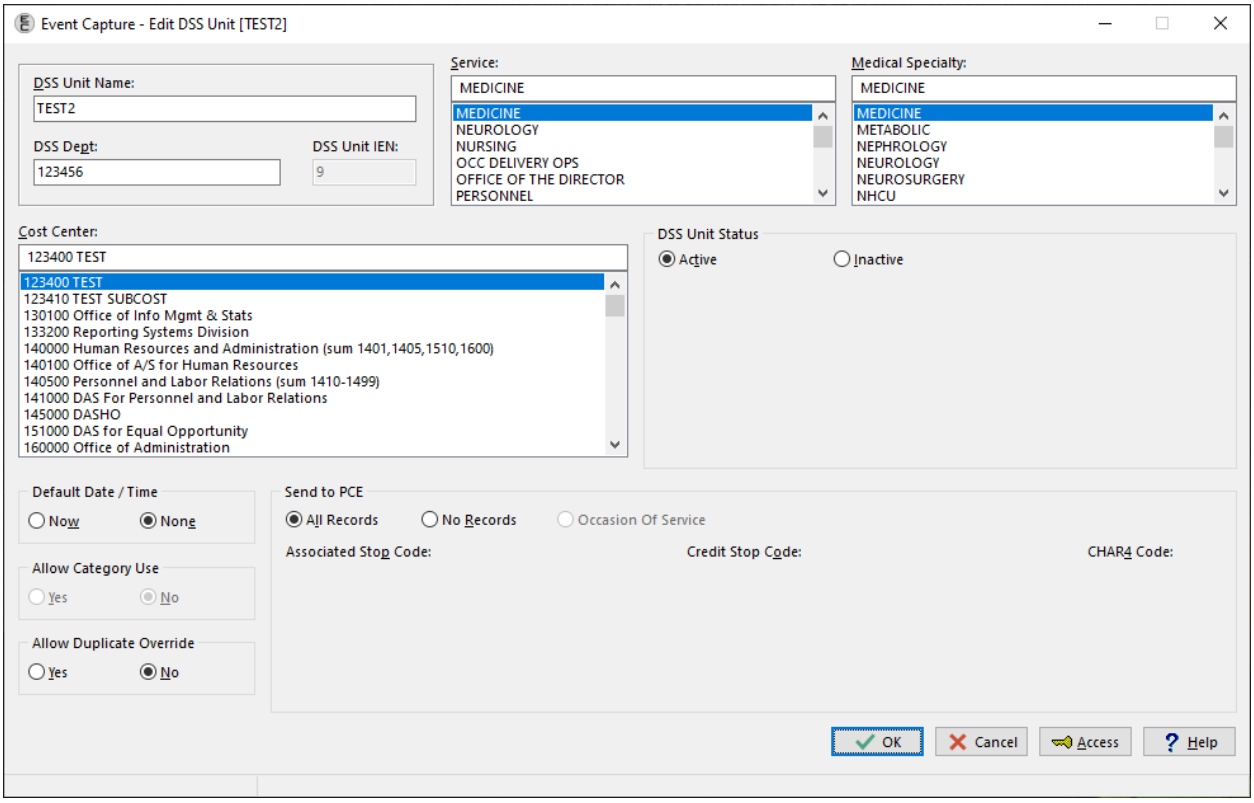
The Update DSS Unit option allows the user to edit DSS Units for use with Event Capture.

Step 1. Select a DSS Unit from the list of DSS Units on the Management Menu [DSS Unit] screen.

Step 2. Click the Update button.

- The Edit DSS Unit screen will display for the selected DSS Unit (Figure 188)

Figure 188: Edit DSS Unit Screen



Step 3. Enter a DSS Unit Name.

Step 4. Enter a DSS Dept.

Step 5. Select a Service from the list provided.

Step 6. Select a Medical Specialty from the list provided.

Step 7. Select a Cost Center from the list provided.

Step 8. Select a DSS Unit Status value of Active or Inactive

- When changing the status of the DSS Unit from **Inactive to Active**:
  - Select the "Active" radio button under DSS Unit Status.
  - An *Event Code Screens* group-box is displayed containing radio buttons and a grid. (Figure 189). The radio buttons are labeled "Reactivate" and "Remain Inactive".
  - To reactivate all the associated Event Code Screens, select "Reactivate".
  - To leave all associated Event Code Screens inactive, select "Remain Inactive".
  - Click OK to apply the change and file the record.

Note:

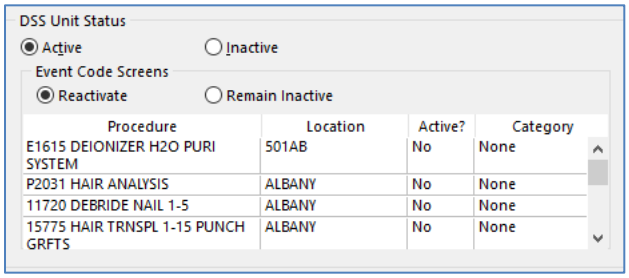
- If “Reactivate” is not selected, the Event Code Screens will remain inactive.

- When changing the status of the DSS Unit from **Active to Inactive**:
  - Select the “Inactive” radio button under the DSS Unit Status.
  - Click OK to apply the change and file the record.

Note:

- When the DSS Unit Status is changed from “Active” to “Inactive”, the associated Event Code Screens are automatically inactivated.

Figure 189: DSS Unit Status Change from Inactive to Active



Step 9. Choose the Default Date / Time.

Step 10. Choose whether to Allow Category Use.

- If the DSS Unit is not used in any Event Code Screens, the "Allow Category Use" value can be toggled between "Yes" and "No". Once Event Code Screens using the DSS Unit have been defined, the user may change the "Allow Category Use" setting from "Yes" to "No" to disallow the use of Categories; however, if the "Allow Category Use" is set to "No", the radio buttons will be disabled, and the value cannot be changed.
- Allowing Category use does not mean Categories are required, but merely gives the site the option to use Categories. Setting this flag to "No" will not allow the site to use categories when creating an Event Code Screen.

Step 11. Choose whether to Allow Duplicate Override.

Step 12. Choose the appropriate Send to PCE option: All Records or No Records

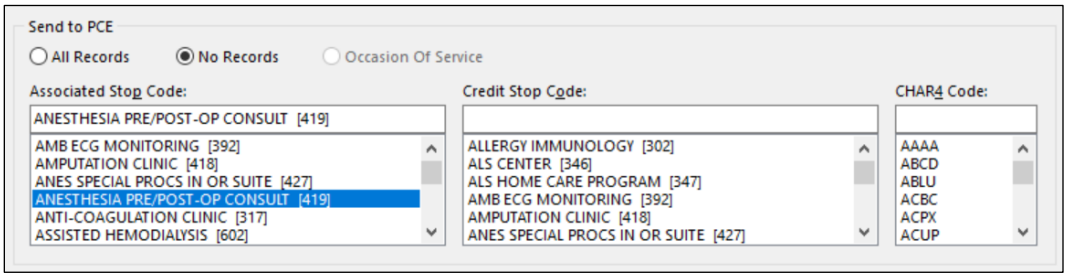
Note:

- When updating an established DSS Unit, Send to PCE cannot be set to Occasion Of Service. Occasion Of Service can only be selected on initial DSS Unit setup. In addition, for an established DSS Unit with a Send to PCE set to Occasion Of Service, Send to PCE cannot be modified.

- When the Send to PCE option is set to <u>All Records</u>, the Associated Stop Code field will not be visible.

- When the Send to PCE selection is set to No Records, then (Figure 190):
  - An Associated Stop Code must be entered for the DSS Unit during setup.
  - A Credit Stop Code may be added.
  - A CHAR4 Code may be added.

Figure 190: Update a DSS Unit — Send to PCE with No Records



Step 13. Click the OK button when selections are complete.

4.4.2.4 To Grant Access to a DSS Unit

From the Add or Update DSS Units screens, the user has the option to give specific users access to the DSS Unit being added or edited.

Step 1. Click the Access button at the bottom of the Add or Edit DSS Unit screen.

- The Grant Access to DSS Unit Screen opens and has Include and Exclude fields (Figure 191).

Step 2. Type the starting characters of the last name in the upper portion of the Excluded list box, or simply scroll through the list to search for a last name.

- The Excluded list box contains the names of all active VistA users at the site.

Step 3. Grant access to a specific DSS unit by moving a user to the Included list box.

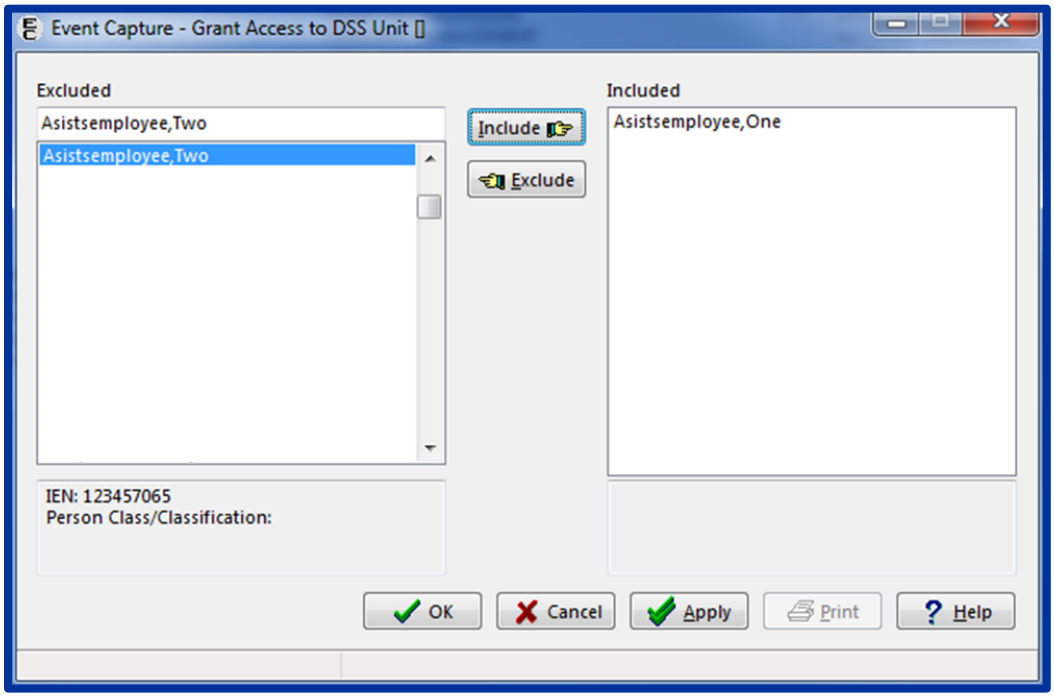
- Highlight a name in the Excluded list box and click the **Include** button or simply double-click the name in the Excluded list box.
- Access is denied by moving a user to the Excluded list box, either by highlighting a name in the Included list box and clicking the **Exclude** button, or by simply double-clicking the name in the Included list box.

Step 4. Click the Apply button to save the changes and continue granting access to additional users or click the OK button to save the changes and return to the previous screen.

Note:

- The IEN and Person Class/Classification for a selected user appear below the associated Excluded or Included list box.

Figure 191: Grant Access to DSS Unit

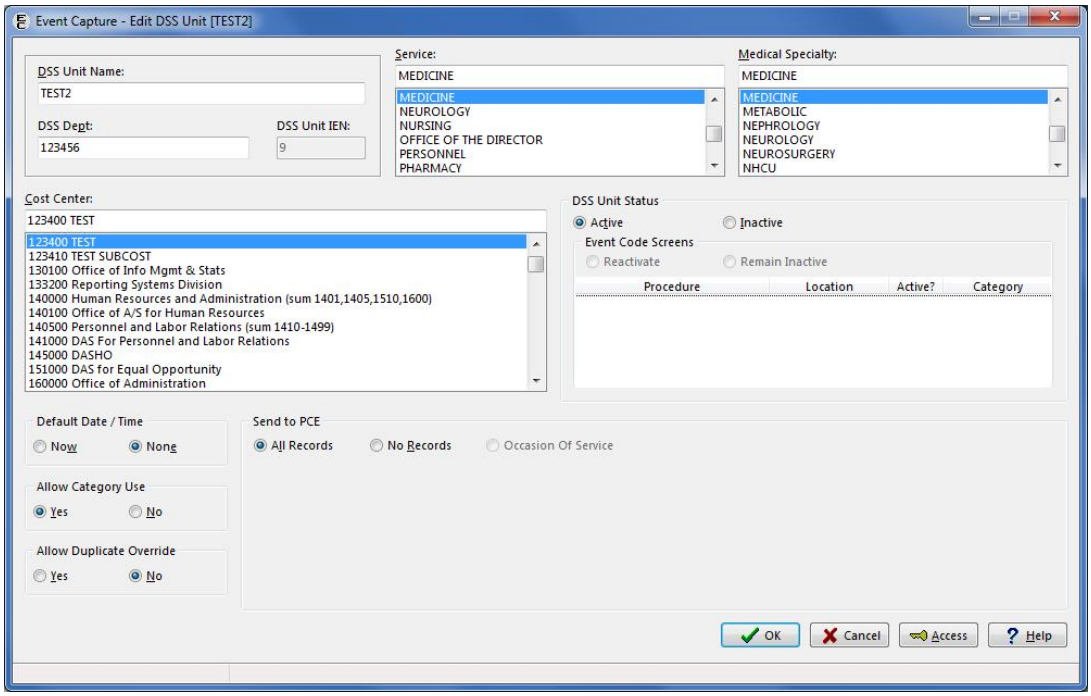


4.4.2.5 To Disable Categories for a DSS Unit

Step 1. Select a DSS Unit which allows categories from the list of DSS Units and click the Update button.

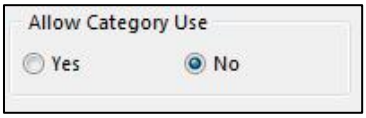
- The Edit DSS Unit screen opens for the selected DSS Unit (Figure 192).

Figure 192: Edit DSS Unit Screen Showing a DSS Unit Set to Allow Categories



Step 2. In the Allow Category Use section (Figure 193), click the No radio button, then click the OK button.

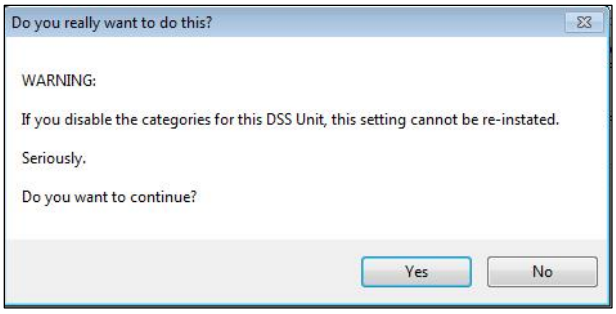
Figure 193: Allow Category Use Set to No



- A warning pop up window appears stating that if categories are disabled, this setting cannot be re-instated (Figure 194).

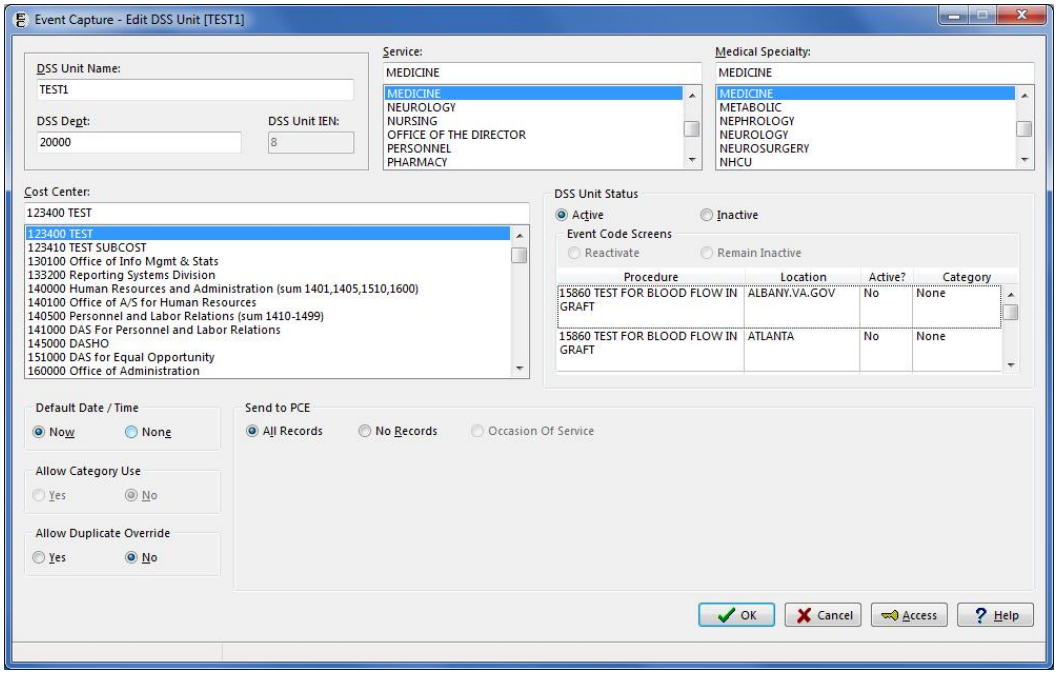
Step 3. Click Yes to confirm.

Figure 194: Disable Category Warning Pop Up Message



- On the Edit DSS Unit screen, the Event Code Screens section shows "None" listed in the Category column. The Allow Category Use section is now disabled (Figure 195).

Figure 195: Edit DSS Unit Screen After Disabling Categories



Step 4. Click OK to return to the Management Menu [DSS Units] screen.

Note:

- Once categories are disabled for a DSS Unit, any fields for entering category information for that DSS Unit will be disabled on all Event Capture screens.
- Once categories are disabled for a DSS Unit, any previously entered workload will remain available for viewing and editing.
- A report is available to Management users which lists all DSS Units that do not allow use of categories. (See Section 4.3.2.2, Disabled Category and Procedure Summary).
- Event Code Screens without categories will remain available for use.

4.4.3 Access by User — Grant Access to DSS Units by User

Before the User Starts

- Use extreme caution when using this option. Removing access to a specified DSS Unit for all users and inactivating the DSS Unit is not recommended without the permission of the associated service.
- Contact each service for a list of its Event Capture users and the DSS Units for which they enter data.
- The user must have access to a given DSS Unit before procedure data can be entered.
- Access can be provided to all DSS Units by assigning the ECALLU security key to a specified user (normally the DSS Manager or designee) using the Allocation of Security Keys option in the Key Management Menu under the Menu Management Menu.

Note:

- This option cannot be used to remove access to DSS Units for users who hold the ECALLU security key.

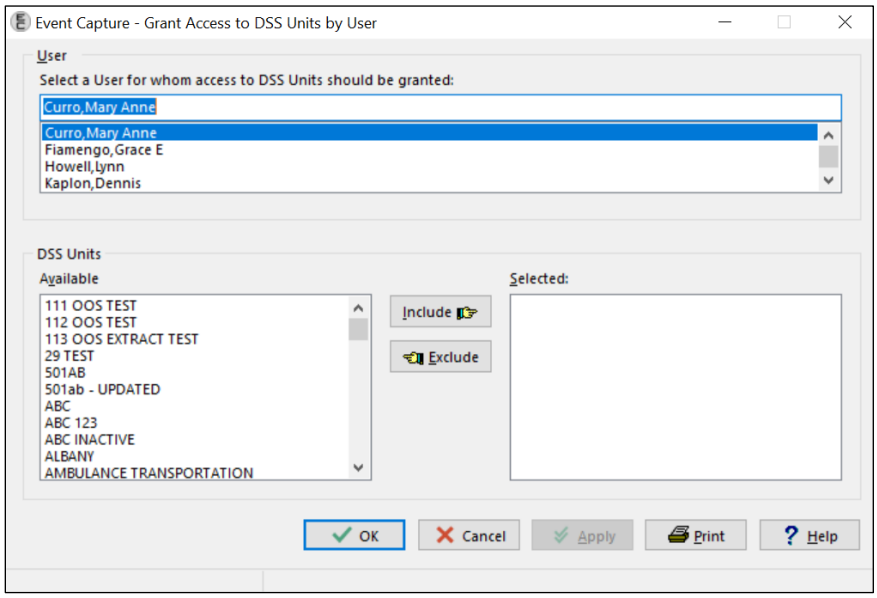
What the User Will See

- A list of users available for selection (Figure 196).
- For a selected user, the Available DSS Units and the Selected DSS Units display. Selected DSS Units represent the DSS Units for which the selected user has access

4.4.3.1 Assign User Access to DSS Units

Step 1. Select a user.

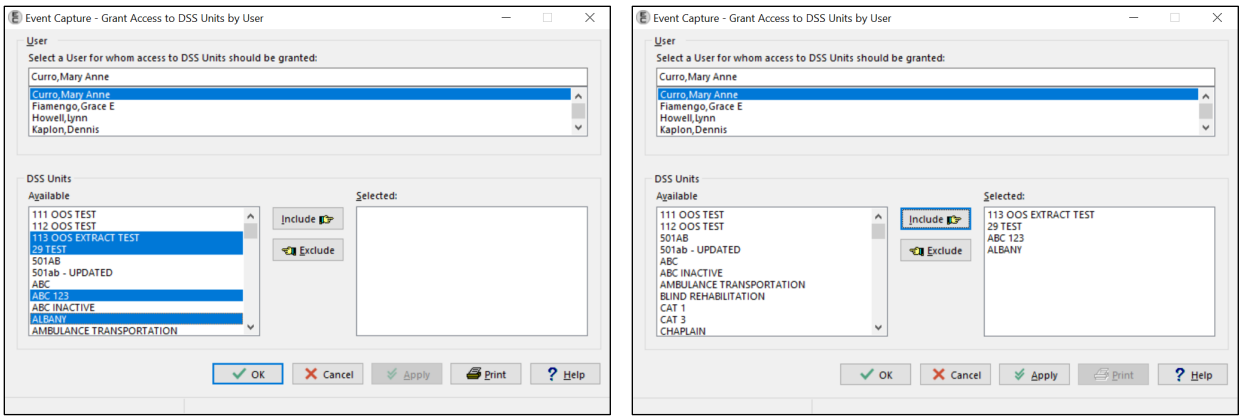
Figure 196: Grant Access to DSS Units by User



Step 2. Select one or more DSS Unit(s) in the Available list by highlighting the selected unit(s) and clicking on the Include button (Figure 197).

- Press and hold the <**Ctrl**> key to select more than one DSS Unit.
- Move highlighted items to the Selected list by clicking the **Include** button.
- Similarly, access to DSS Units can be removed for the selected user by highlighting a DSS Unit in the Selected list, then clicking the **Exclude** button.

Figure 197: Grant Access to DSS Units by User — Adding DSS Units



Step 3. Click the Apply button to apply the changes and continue working or click the OK button to apply the changes and exit the screen.

4.4.4 Category — Add or Update Categories

This option allows Management users to enter or edit, but not delete, local categories in the EVENT CAPTURE CATEGORY file (#726).

DSS Units can be defined to use categories to group procedures during data entry. Categories are facility-specific; therefore, users can use names that best suit their facility. For example, for a DSS Unit named "Audiology and Speech," categories could be named "Speech Evaluation" and "Audiology Testing." It is acceptable to have both DSS Units that do use categories and DSS Units that do not use categories defined at a facility.

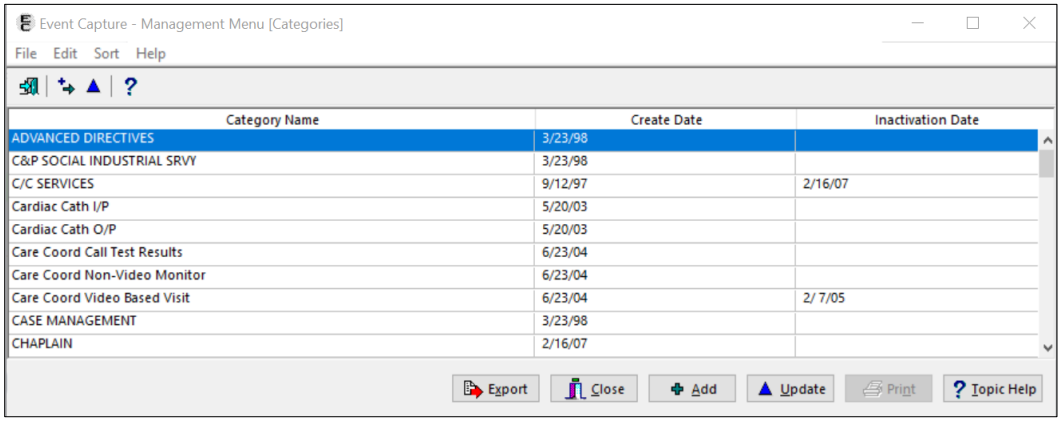
Before the User Starts

- The user can ignore this option if the site's DSS Units are defined for use without categories.
- Categories cannot be deleted, but this option can be used to inactivate or reactivate them.

What the User Will See

- After selecting Category — Add or Update Categories from the Management Menu, the first window displays a list of Category Names, the Date created, and the Inactivation Date (Figure 198).
- The Management Menu [Categories] screen provides options to Add or Update a category.

Figure 198: Categories Main Screen on Management Menu



Category Name	Create Date	Inactivation Date
ADVANCED DIRECTIVES	3/23/98	
C&P SOCIAL INDUSTRIAL SRVY	3/23/98	
C/C SERVICES	9/12/97	2/16/07
Cardiac Cath I/P	5/20/03	
Cardiac Cath O/P	5/20/03	
Care Coord Call Test Results	6/23/04	
Care Coord Non-Video Monitor	6/23/04	
Care Coord Video Based Visit	6/23/04	2/ 7/05
CASE MANAGEMENT	3/23/98	
CHAPLAIN	2/16/07	

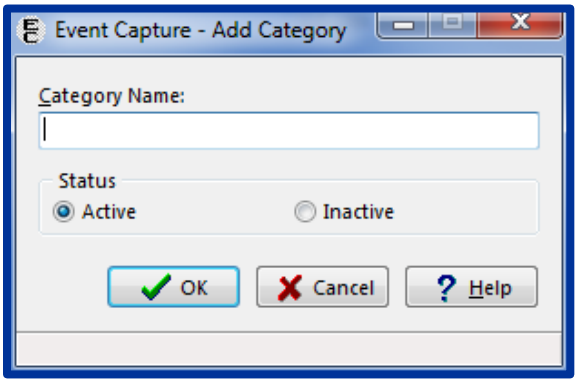
4.4.4.1 Add Categories

Step 1. Click the Add button, or use the menu bar, and select Edit > Add.

- The Add Category screen opens (Figure 199).
- The Status field defaults to "Active."

Step 2. Enter the name of the category to be added and click the OK button.

Figure 199: Add Category Screen



4.4.4.2 Update Categories

Step 1. On the Management Menu [Categories] screen, select a category to modify and click Update.

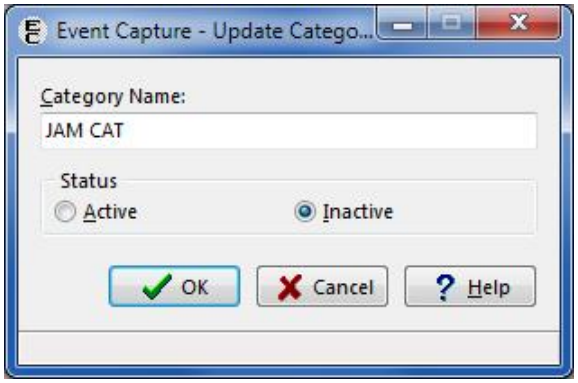
- The Update Category screen displays (Figure 200).

Step 2. Change the category to its new status by clicking Active or Inactive.

Step 3. Click the OK button to file the change and return to the previous screen.

- The Management Menu [Categories] screen will reflect the changes made. If the category was inactivated, the Inactivation Date will display the current date.

Figure 200: Update Category Screen



The **Export** button enables users to export the data to an Excel spreadsheet (Figure 201).

Figure 201: Export — ECS Category Table

	A	B	C
1	Category Name	Create Date	Inactivation Date
2	ADVANCED DIRECTIVES	3/23/98	
3	C&P SOCIAL INDUSTRIAL SRVY	3/23/98	
4	C/C SERVICES	9/12/97	2/16/07
5	Cardiac Cath I/P	5/20/03	
6	Cardiac Cath O/P	5/20/03	
7	Care Coord Call Test Results	6/23/04	
8	Care Coord Non-Video Monitor	6/23/04	
9	Care Coord Video Based Visit	6/23/04	2/ 7/05
10	CASE MANAGEMENT	3/23/98	

ECS Category Table Export | Sheet2 | Sheet3

4.4.5 Procedure — Add or Update Local Procedures

The Procedure option allows the user to enter or edit, but not delete local procedures in the EC National Procedure file (#725).

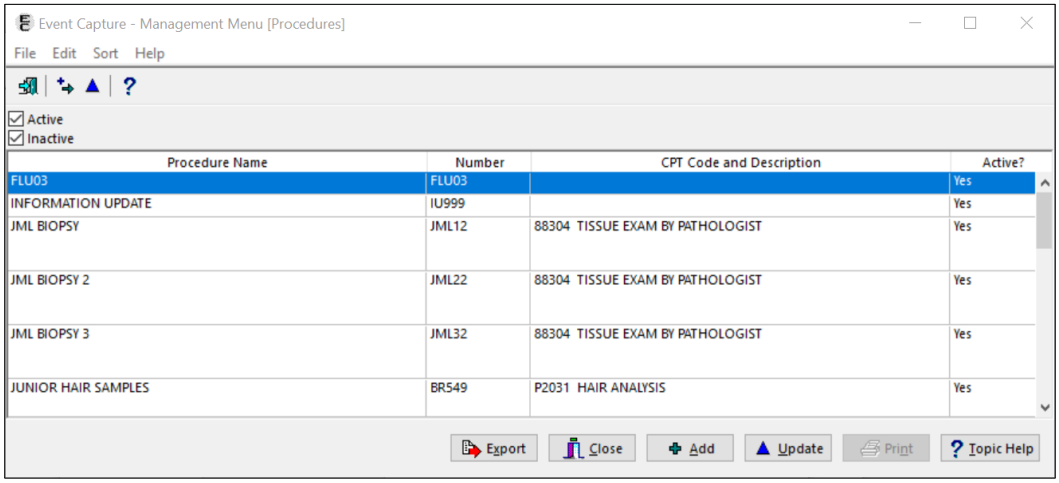
Before the User Starts

- Before using this option, print the National/Local Procedure Report from the Reports menu of the Event Capture Main Menu to print a list of procedures with their associated CPT codes. This report can be lengthy if it includes national procedures. This should be queued to print to a device during non-peak hours.
- Enter an associated CPT code to pass local procedures to the PCE software.
- A local procedure code number is required for any new local procedure.
- The local number code must be five characters in length, starting with an uppercase alpha character, followed by four alphabetic or numeric characters. This number will be used as the national code number for the new local procedure.
- With functionality put in place by the Code Set Versioning project, only active CPT codes are made available, and are based on the date a local procedure is added.

What the User Will See

- After selecting Procedure — Add or Update Local Procedures from the Management Menu, the first screen displays a list consisting of Procedure Name, Number, CPT Code and Description, and Active status (Figure 202).
- The Procedure screen allows the user to select and display only Active or Inactive procedures via check-boxes on the upper left side of the screen.
- The Procedures screen allows the user to **Add** or **Update** a procedure via buttons on the lower right side of the screen.

Figure 202: Management Menu [Procedures] Screen

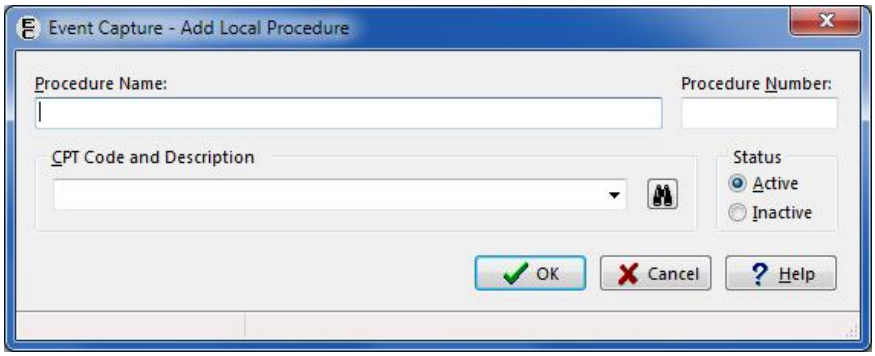


4.4.5.1 Add Procedures

Step 1. Click the Add button, or use the menu bar, and select Edit > Add.

- The Add Local Procedure screen opens (Figure 203).

Figure 203: Add Local Procedure



Step 2. Enter the new local Procedure Name.

Step 3. Enter the local Procedure Number.

Step 4. Enter the CPT Code if the data will transmit to the PCE software.

- The CPT Code and Description field contains CPT Code look-up functionality. The user can search for an existing CPT Code by code, a portion of the code, or a part of the description.

Step 5. Select the Status (Active or Inactive).

- The Status field defaults to “Active.”

Step 6. Click the OK button. The new local procedure has been added.

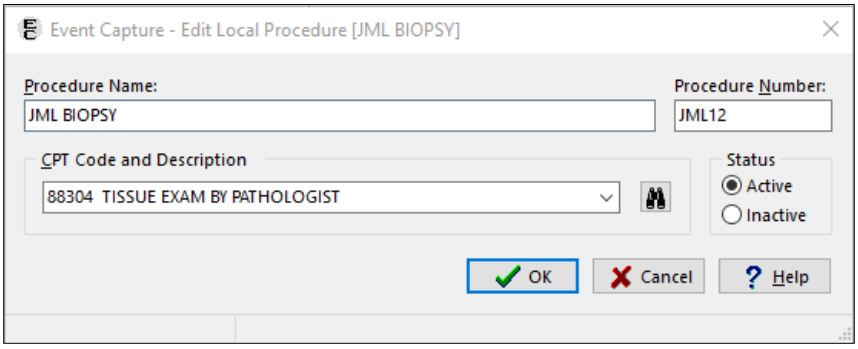
- When attempting to file a new Local Procedure, the system compares the new procedure to the National Procedure code file to prevent duplication. If there is a conflict, a message is displayed, and the local procedure is not added.

4.4.5.2 Update Procedures

Step 1. Highlight the existing record and click the Update button or double-click the row.

- The Edit Local Procedure screen opens (Figure 204).

Figure 204: Edit Local Procedure



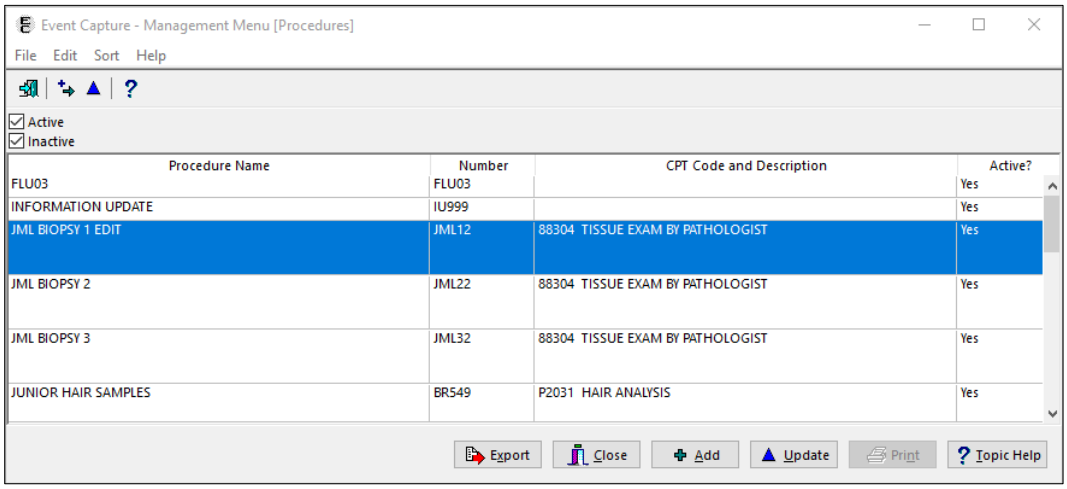
Step 2. Edit the Procedure Name, Procedure Number, CPT Code and Description, and/or Status.

- Local procedures cannot be deleted, but the Status can be used to inactivate or reactivate them.
- The CPT code for a local procedure can be deleted by deleting the value in the CPT Code and Description field, then clicking the OK button.

Step 3. Click the OK button.

- The updated local procedure appears on the Procedures screen. The highlighted row in Figure 205 shows the updated Procedure Name.

Figure 205: Update After Editing a Local Procedure



The Procedures listing can be exported to Excel. The tab in Excel is titled “ECS Procedure Table Export” (Figure 206).

Figure 206: Export — Procedures

	A	B	C	D
1	Procedure Name	Number	CPT Code and Description	Active?
2	FLU03	FLU03		Yes
3	INFORMATION UPDATE	IU999		Yes
4	JML BIOPSY 1 EDIT	JML12	88304 TISSUE EXAM BY PATHOLOGIST	Yes
5	JML BIOPSY 2	JML22	88304 TISSUE EXAM BY PATHOLOGIST	Yes
6	JML BIOPSY 3	JML32	88304 TISSUE EXAM BY PATHOLOGIST	Yes
7	JUNIOR HAIR SAMPLES	BR549	P2031 HAIR ANALYSIS	Yes

ECS Procedure Table Export

Ready Display Settings 100%

4.4.6 Reason — Add or Update Procedure Reasons

Reasons are site-defined descriptions explaining why a procedure was performed for a patient.

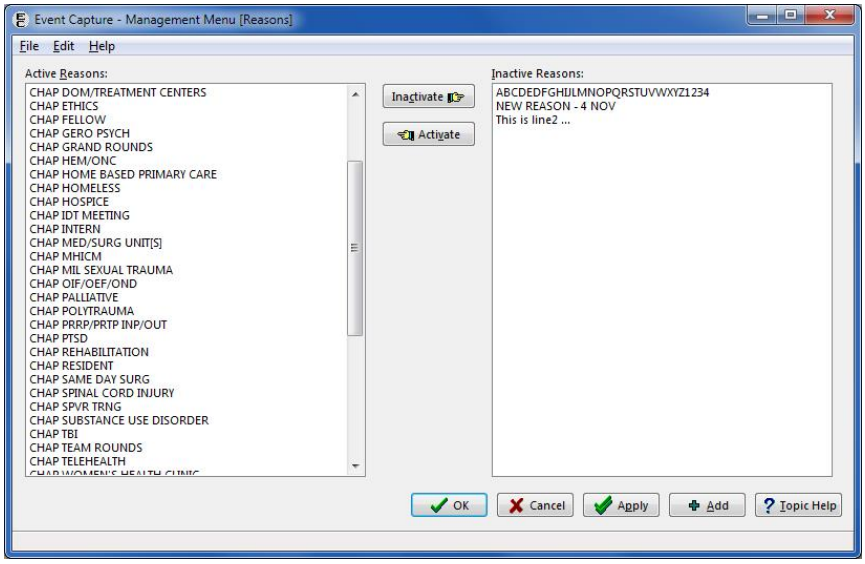
Before the User Starts

- Users with the ECMGR security key can activate or inactivate existing reasons.
- If a reason is listed as inactive, it will not appear on the dropdown list for reasons on any screen.
- Event Capture managers can add a new reason using the Event Capture — New Reason screen.
- New reasons will immediately be available for use in data entry.

What the User Will See

- After selecting Reason — Add or Update Procedure Reasons from the Management Menu, the first screen displays a list of Active Reasons and Inactive Reasons (Figure 207).

Figure 207: Management Menu [Reasons] Screen

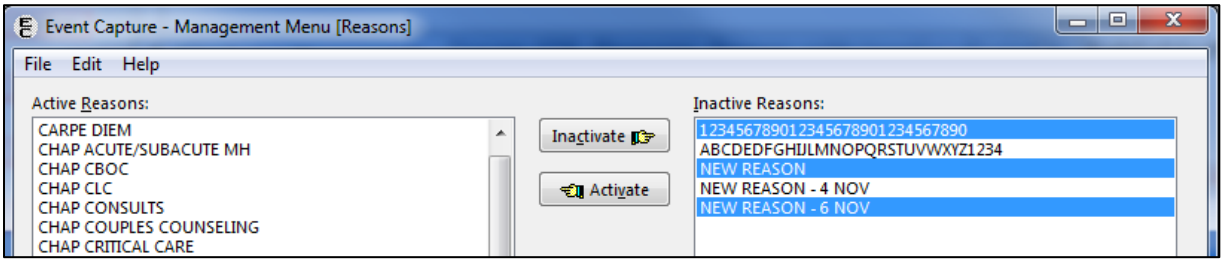


4.4.6.1 Activate Reasons

Step 1. Highlight one or more items from the Inactive Reasons list box and click the Activate button.

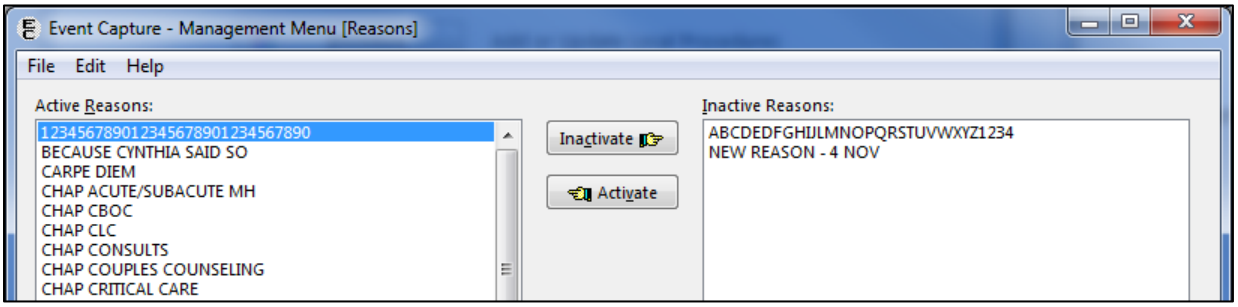
- To move more than one reason, press and hold the <**Ctrl**> key and then highlight additional items (Figure 208).

Figure 208: Reasons Screen with Inactive Reasons Selected



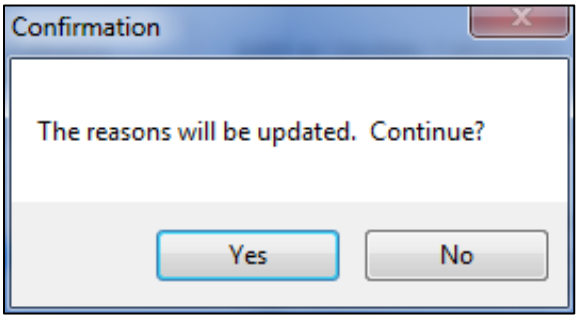
The Inactive Reason(s) selected will appear in the Active Reasons column when the Activate button is clicked (Figure 209).

Figure 209: Reasons Screen with Inactive Reasons Moved to the Active Column



Click the **Apply** button to apply the changes and continue working or click the **OK** button to apply the changes and exit the screen. A confirmation prompt will appear. Click the **Yes** button to save the changes (Figure 210).

Figure 210: Confirmation Prompt

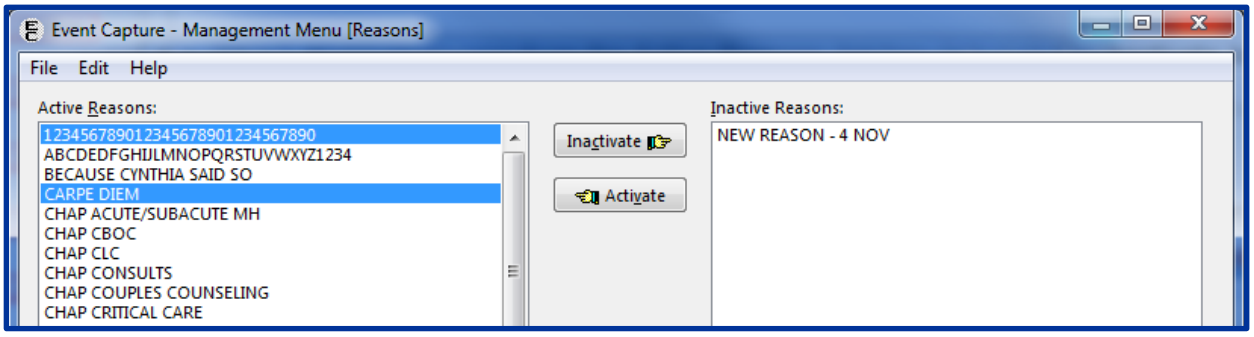


4.4.6.2 Inactivate Reasons

Step 1. Highlight item(s) from the Active Reasons list box and click the Inactivate button.

- To move more than one reason, click and hold the <**Ctrl**> key and then highlight additional items (Figure 211).

Figure 211: Reasons Screen with Active Reasons Highlighted

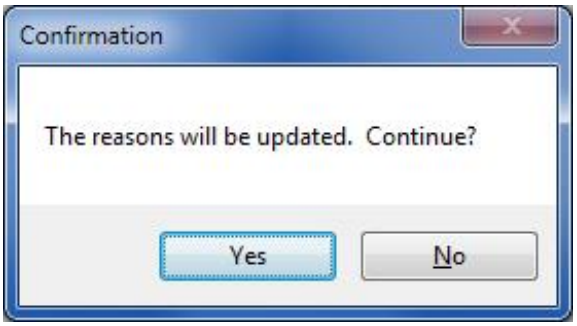


The Active Reason(s) selected will appear in the Inactive Reasons column when the **Inactivate** button is clicked (Figure 212).

Figure 212: Reasons Screen with Active Reasons Moved to the Inactive Column

Click the **Apply** button to apply the changes and continue working or click the **OK** button to apply the changes and exit the screen. A confirmation prompt will appear (Figure 213). Click the **Yes** button to save the changes.

Figure 213: Confirmation Prompt

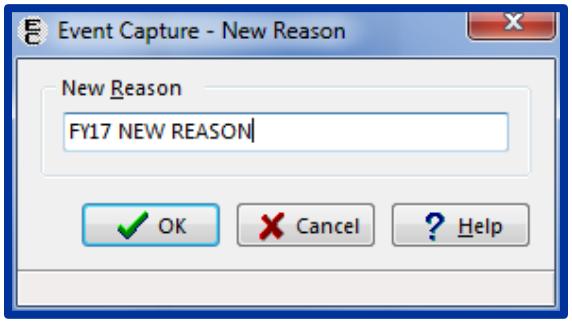


4.4.6.3 Add a New Reason

Step 1. Click the Add button.

- The Event Capture — New Reason screen will appear (Figure 214).

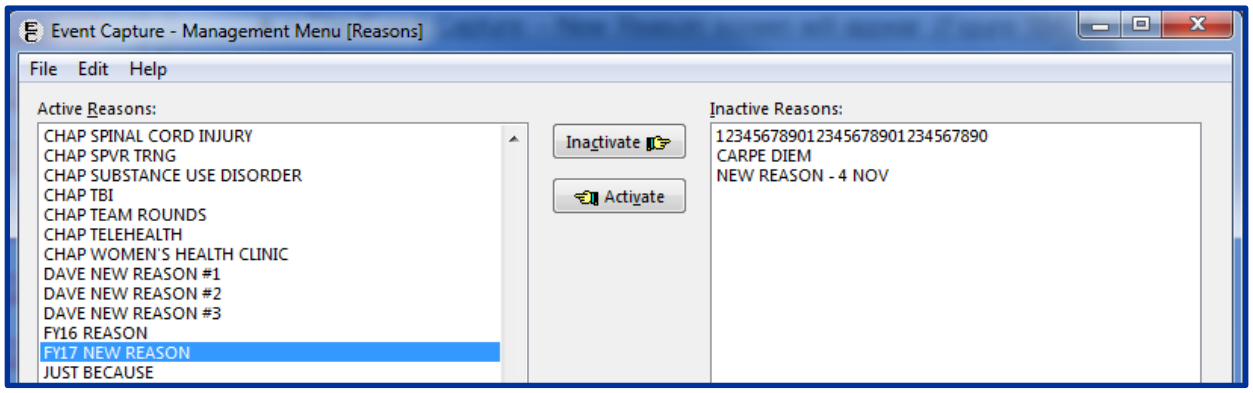
Figure 214: New Reason Screen



Step 2. Type the name of the new reason, then click the OK button to add the reason to the Active Reasons column. Click the Cancel button to exit the screen without saving the record.

- Once the new reason is added, it will appear on the Reasons screen (Figure 215).

Figure 215: Reasons Screen with New Reason Added



4.4.7 Event Code Screens

This option allows you to add, edit, or copy Event Code Screens for use with Event Capture. Additionally, Event Code Screens without workload may be deleted.

The Event Code Screen option allows the user to create Event Code Screens for one or all Event Capture locations. Event Code Screens define procedure information. During data entry users can select only the procedures defined in the Event Code Screens. For each screen, you are prompted to enter the following information:

- DSS Unit
- Category (If DSS Units are defined to group procedures by categories)
- Procedure

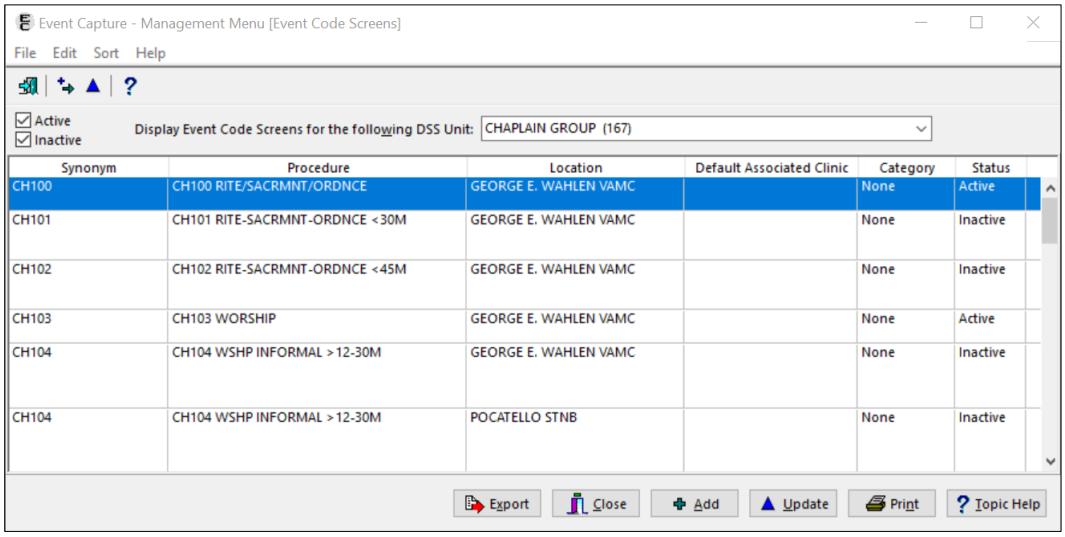
Before the User Starts

- Use the Location — Update Location Information option to create an Event Capture location before using this option.
- Use the DSS Unit — Add or Update DSS Units option to establish DSS Units before using this option.
- Event Code Screens must be defined before entering any Event Capture data.
- A prompt for Category occurs only if the Event Code Screen uses categories to group procedures.
- The user must define an active Associated Clinic and CPT code to pass Event Code procedures to PCE.
- With functionality put in place by the Code Set Versioning project, only active CPT codes can be selected, and they will be based on the date the Event Code Screen is being set up.
- The Event Code Screen enables the use of characters "/" and "-" in the search field.
- The Associated Clinic on the Event Code Screen is not auto-populated.
- The **Print** and **Export** buttons are available on the Event Code Screen.
- Users with the ECMGR key will be able to copy EC screens to another DSS Unit.

What the User Will See

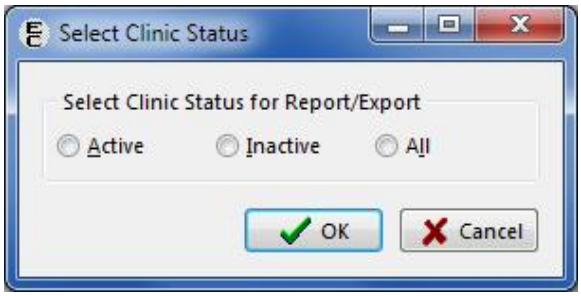
- After selecting Event Code Screen — Add or Update Event Code Screens from the Management Menu, the first screen displays a drop-down box of DSS Units.
- Select a DSS Unit to display the Event Code Screen data. Options to search by "Active" or "Inactive" status are also available. Columns include Synonym, Procedure, Location, Default Associated Clinic, Category and Status (Figure 216).

Figure 216: Event Code Screens Example



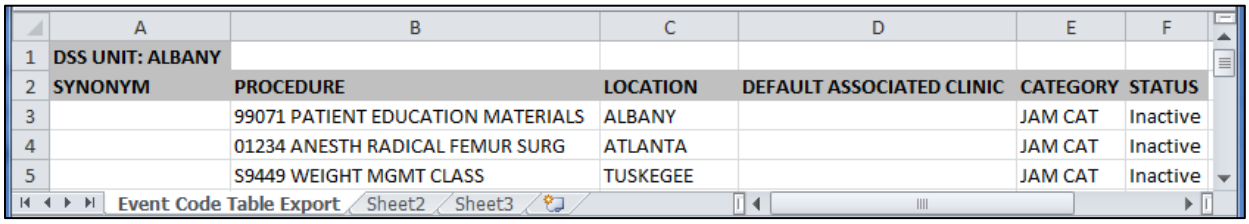
- Click the **Print** button to print the Event Code Screens listing. When printing the report, the user will be prompted to choose Active, Inactive or All for the Clinic Status (Figure 217).

Figure 217: Select Clinic Status for the Event Code Screens Listing



- The Event Code Screens information can also be exported to Excel. The user will be prompted to choose Active, Inactive or All for the Clinic Status. The tab in Excel is titled "Event Code Table Export" (Figure 218).

Figure 218: Exported Event Code Table Report



	A	B	C	D	E	F
1	DSS UNIT: ALBANY					
2	SYNONYM	PROCEDURE	LOCATION	DEFAULT ASSOCIATED CLINIC	CATEGORY	STATUS
3		99071 PATIENT EDUCATION MATERIALS	ALBANY		JAM CAT	Inactive
4		01234 ANESTH RADICAL FEMUR SURG	ATLANTA		JAM CAT	Inactive
5		S9449 WEIGHT MGMT CLASS	TUSKEGEE		JAM CAT	Inactive

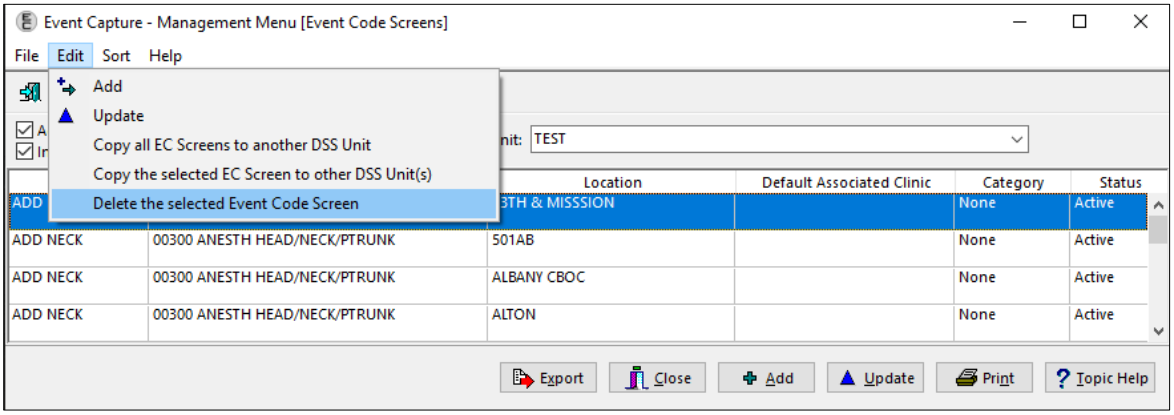
Event Code Table Export Sheet2 Sheet3

4.4.7.1 Delete Event Code Screens

The **Edit** drop-down menu at the top of the Event Code Screens window (Figure 219) allows the user to delete an unused Event Code Screen. If the user selects **Delete the selected Event Code Screen** from the drop-down menu, the following prompt is displayed: "The selected Event Code Screen will be deleted. Continue?". If "Yes" is selected, the system will check for any workload on the Event Code Screen.

- If there is workload on the selected Event Code Screen, then the Event Code Screen will not be deleted.
- If there is no workload on the selected Event Code Screen, then the Event Code Screen will be deleted.

Figure 219: Management Menu [Event Code Screens]



Note:

- The VA MailMan service will send an automated message to the user listing the Event Code Screens that have been deleted. An example of this message can be seen in Appendix C.

4.4.7.2 Add Event Code Screens

Step 1. Select a DSS Unit from the dropdown list (Figure 220).

Step 2. Click the Add button or use the menu bar and select Edit > Add.

- The Add Event Code Screen will open (Figure 221).

Figure 220 Management Menu [Event Code Screens] Select DSS Unit

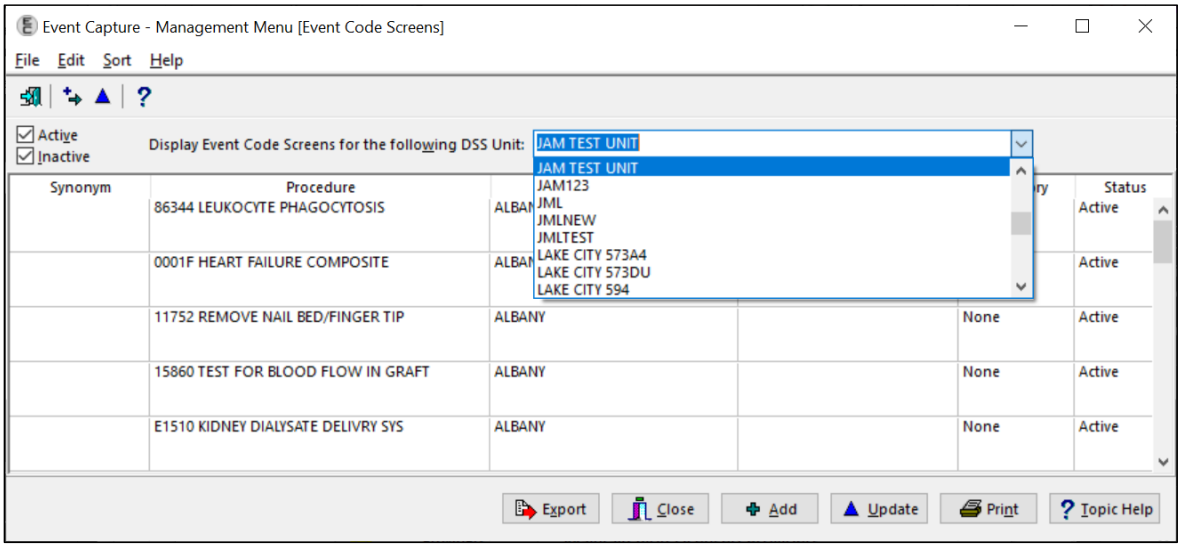
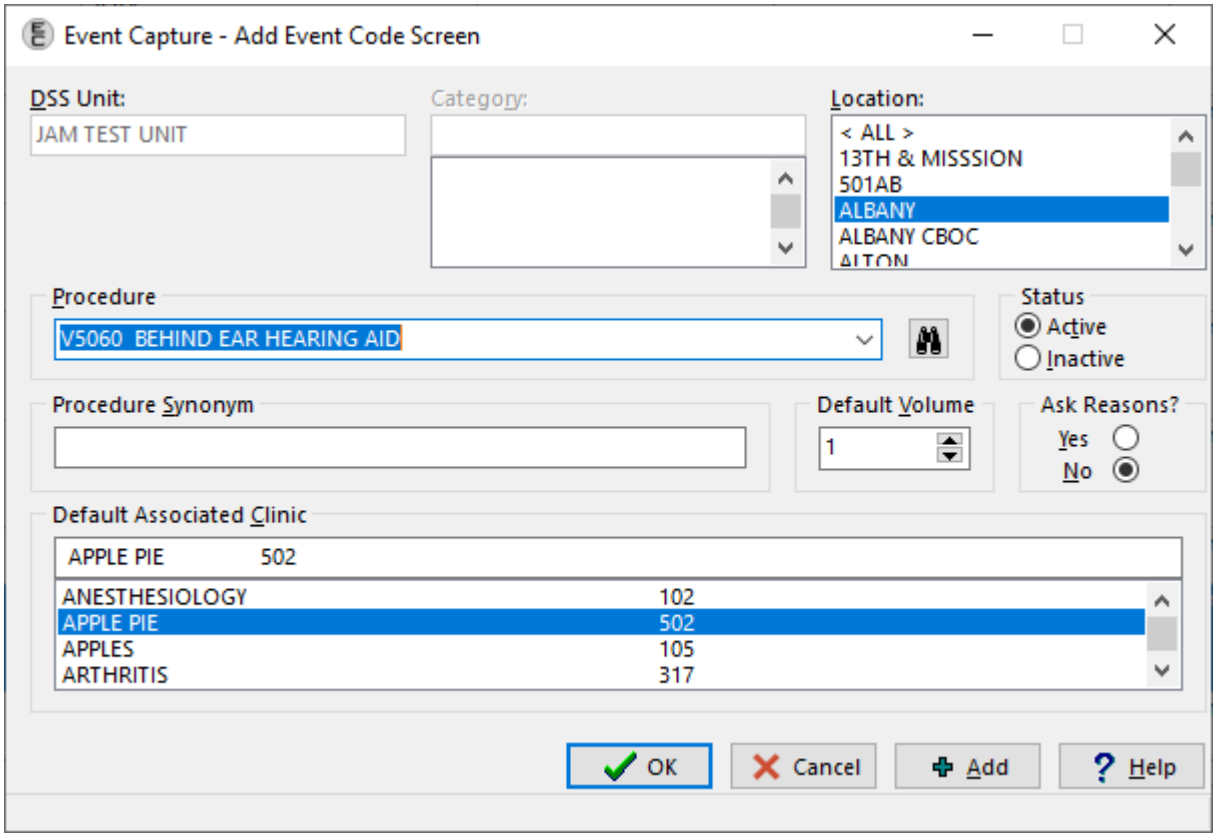


Figure 221: Add Event Code Screen



Step 3. Make selections in the corresponding fields: Category (if enabled), Location (one/multiple/all), Procedure, Status (active/inactive), Procedure Synonym, Default Volume, Ask Reasons and Default Associated Clinic.

Note

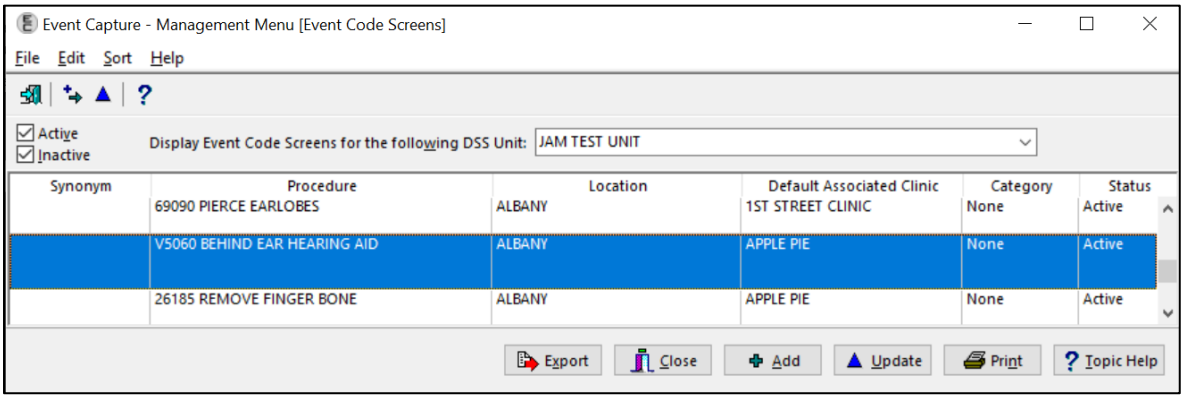
- A clinic must exist in file #728.44 Clinics and Stop Codes prior to being available for selection in any Data Entry options.
- If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.

Step 4. Click the Add button to file the record and add another procedure, if desired (Figure 221). Select a procedure from the Procedure dropdown list. Repeat.

Step 5. Click the OK button to file the record and return to the Event Code Screen list.

- The Add Event Code Screen closes, and the newly added Event Code Screen(s) are displayed in the list (Figure 222).

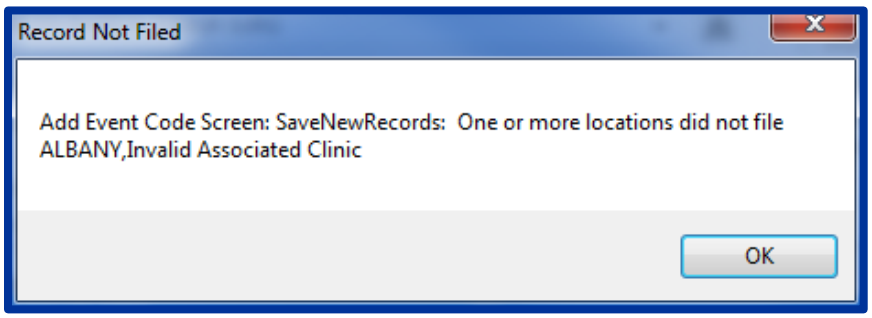
Figure 222: Event Code Screen Added



Note:

- If the user selects an inactive Associated Clinic and then clicks **OK**, an error message appears (Figure 223). Click **OK** on the error message to close it and return to the Add Event Code Screen. From there, the user can select an active Associated Clinic.

Figure 223: Add Event Code Screen — Record Not Filed Error



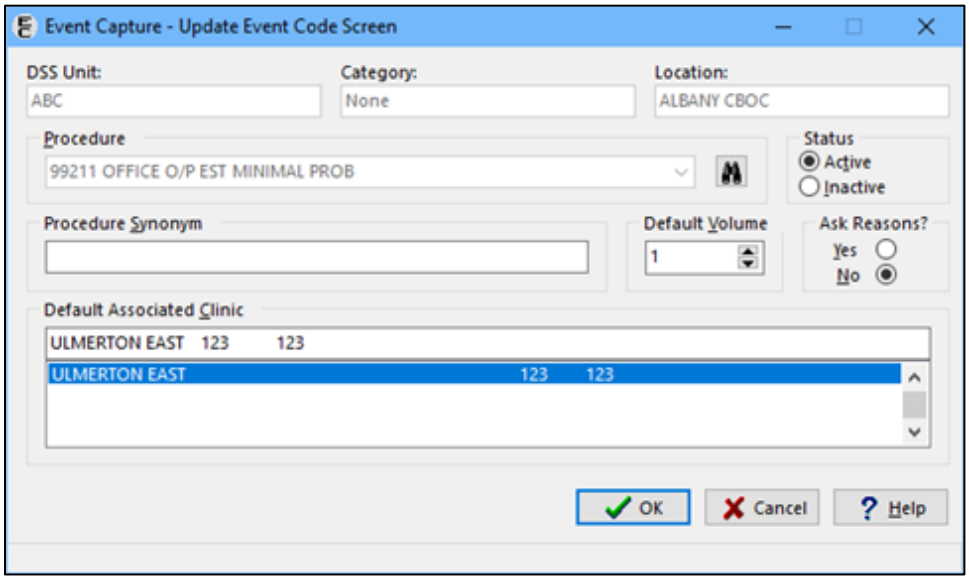
4.4.7.3 Update Event Code Screens

Step 1. Select a DSS Unit from the dropdown list.

Step 2. Highlight a procedure, then click the Update button or use the menu bar and select Edit > Update.

- The Update Event Code (EC) Screen form opens and displays the following fields: DSS Unit, Category, Location, Procedure, Status, Procedure Synonym, Default Volume, Ask Reasons, and Default Associated Clinic (Figure 224).

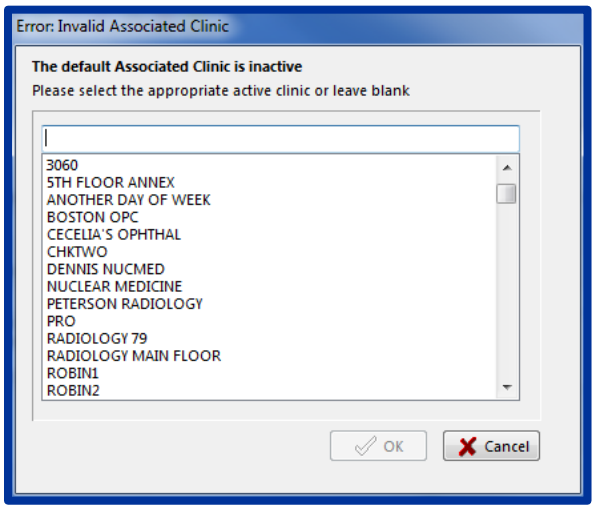
Figure 224: Update Event Code Screen Example



Note:

- If the user attempts to update an Event Code Screen that has an inactive Associated Clinic, an error message appears (Figure 225). The user has the option to select an appropriate active clinic or to leave the Associated Clinic blank.

Figure 225: Update EC Screen Error — Invalid Associated Clinic



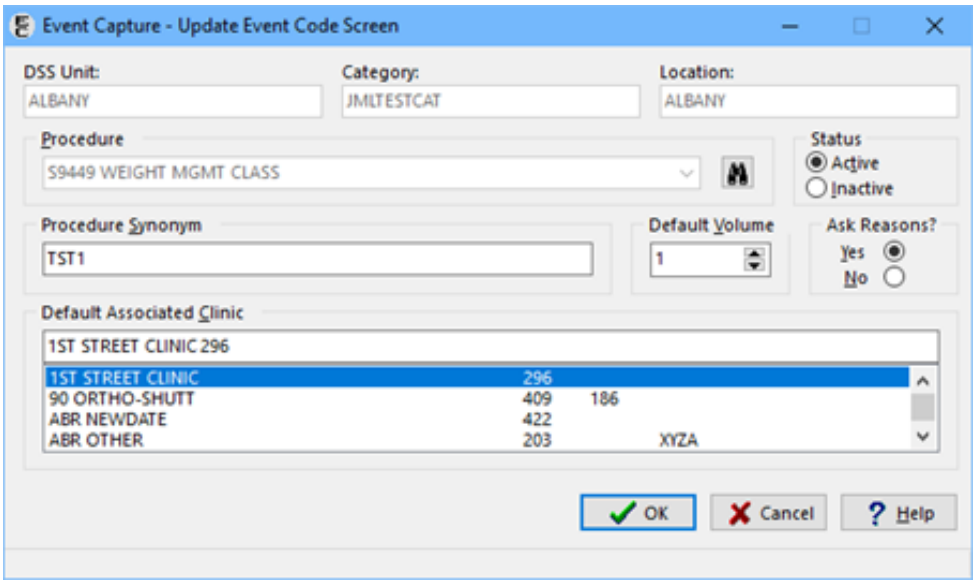
Step 3. On the Update Event Code Screen, update the Procedure Synonym, Default Volume, Status, Ask Reason and/or Default Associated Clinic field values as desired (Figure 226).

- The Default Associated Clinic list box displays only active locations in the HOSPITAL LOCATION file (#44) whose type is "C" (clinic) and is a "count" clinic.

Note

- A clinic must exist in file #728.44 Clinics and Stop Codes prior to being available for selection in any Data Entry options.
- If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.

Figure 226: Update Event Code Screen — Select Default Associated Clinic



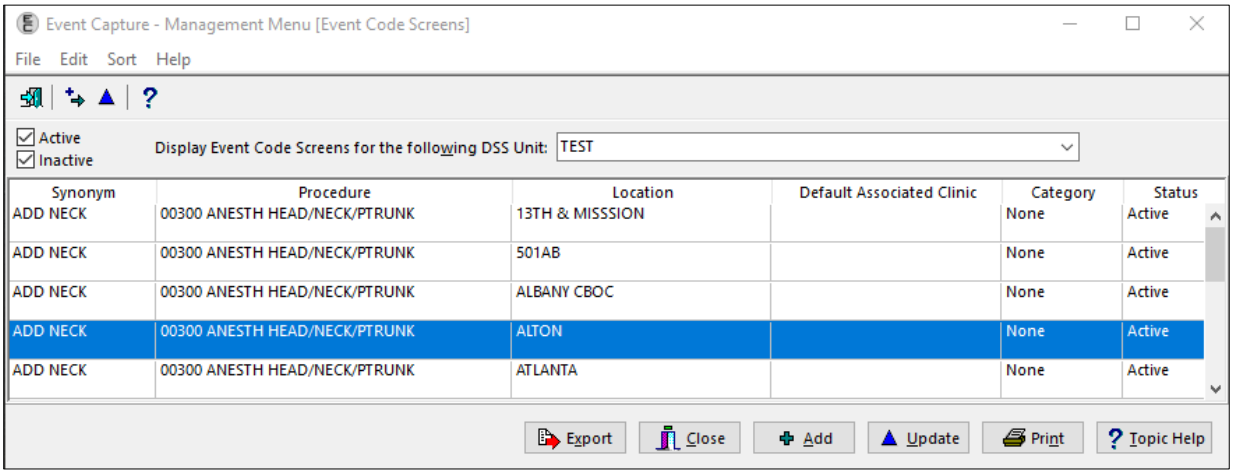
Step 4. Click the OK button.

- The changes for the Event Code Screen record are filed. The Update Event Code Screen closes, and the updated Event Code Screen is displayed in the list.

4.4.7.4 Copy All Event Code Screens to Another DSS Unit

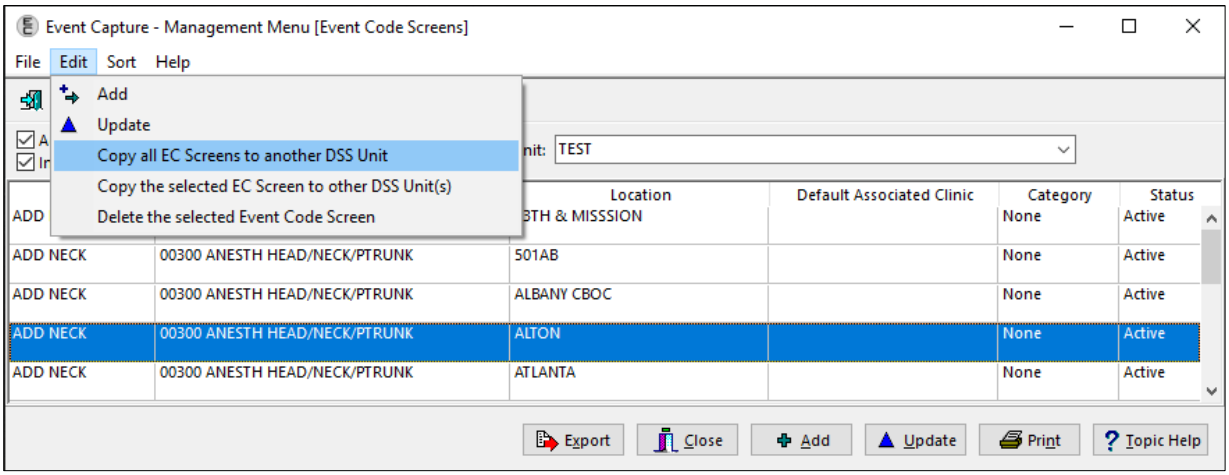
Step 1. Highlight an Event Code Screen that has an Active status (Figure 227).

Figure 227: Event Code Screen with Active Status Selected



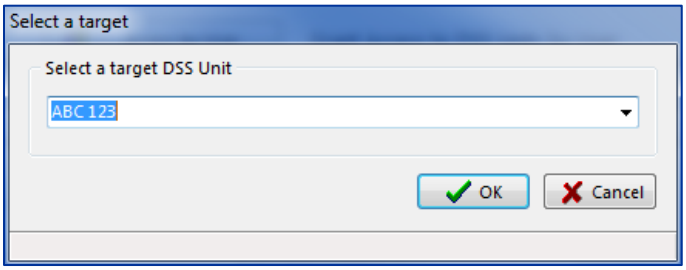
Step 2. From the menu bar, select Edit > Copy all EC Screens to another DSS Unit (Figure 228).

Figure 228: Edit > Copy all EC Screens to another DSS Unit



- The Select a target screen appears (Figure 229).

Figure 229: Select a Target Screen

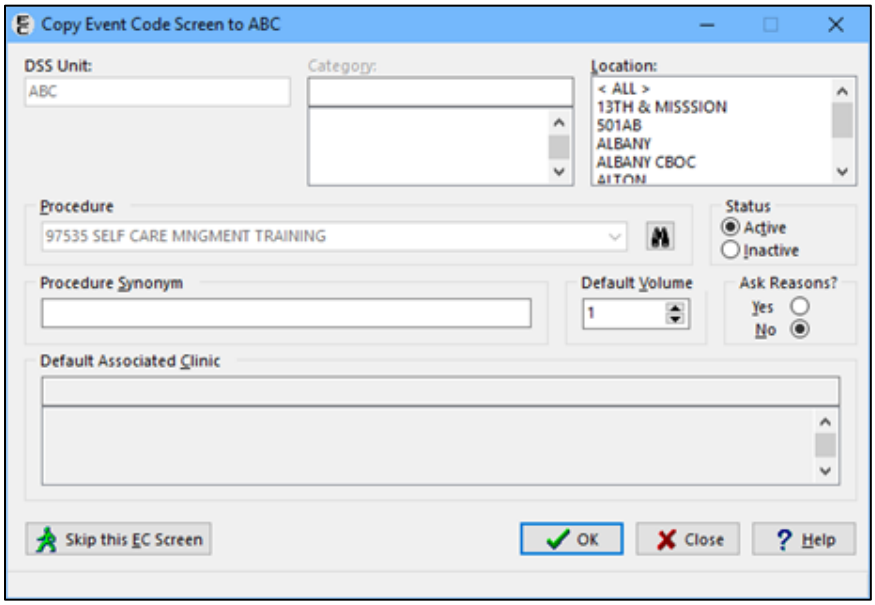


Step 3. Select a target DSS Unit (usually newly created) from the dropdown list, and then click the OK button.

Note:

- The target DSS Unit is usually newly created by the user, but an existing DSS Unit may also be used.
- The Copy Event Code Screen to [user-selected target DSS Unit] window will open. See Figure 230 for an example.

Figure 230: Copy Event Code Screen to DSS Unit



- The Location, Status, Procedure Synonym, Default Volume, Ask Reasons and Default Associated Clinic fields can be modified on this screen.
- The DSS Unit and Procedure cannot be edited.

Note:

- If the DSS Unit is set up to not send records to PCE, the Default Associated Clinic is disabled.

Step 4. Review the field selections and make edits (if necessary).

Step 5. Click the OK button to save the changes and create the copy.

- The next Event Code (EC) Screen window will appear.
- To skip an Event Code Screen, click the **Skip this EC Screen** button. The next Event Code Screen window will appear.

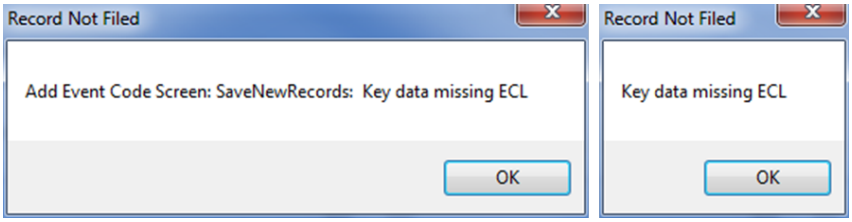
Step 6. When all needed Event Code Screens are copied, select the Close button to return to the Event Code Screen.

- All the previous changes will be saved.
- One, many or all Event Code Screens can be copied.

Note:

- If the user does not select a Location when copying an Event Code Screen, the record will not be filed, and two error messages will appear (Figure 231).
- Click the **OK** button on each error dialog to return to the Copy Event Code Screens form and enter a Location.

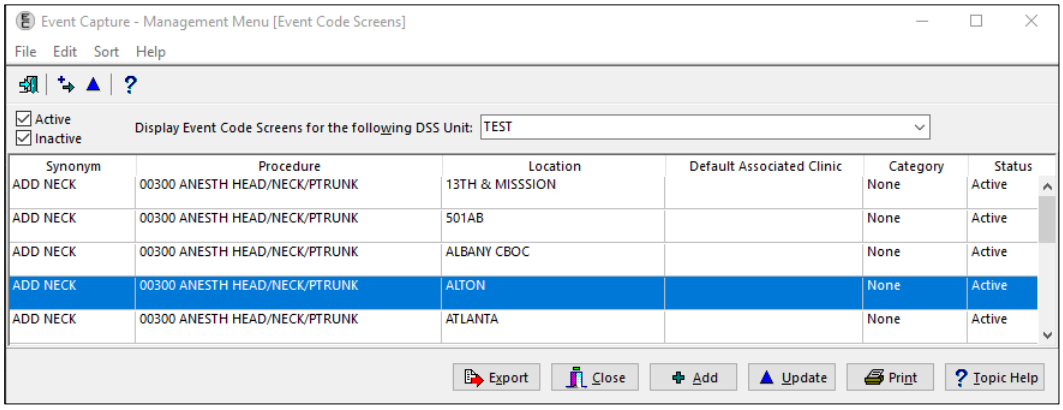
Figure 231: Record Not Filed Error Message for Key Data Missing



4.4.7.5 Copy the Selected Event Code Screen to Other DSS Unit(s)

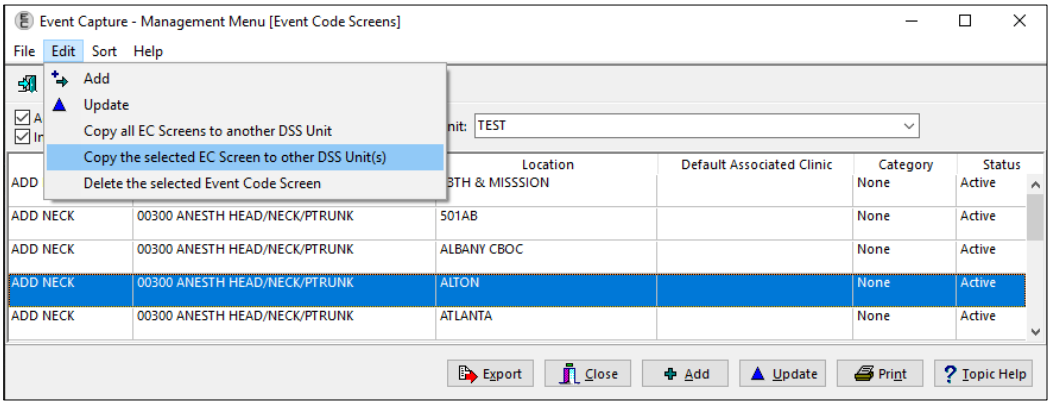
Step 1. Highlight an Event Code Screen that has an Active status (Figure 232).

Figure 232: Event Code Screen with Active Status Selected



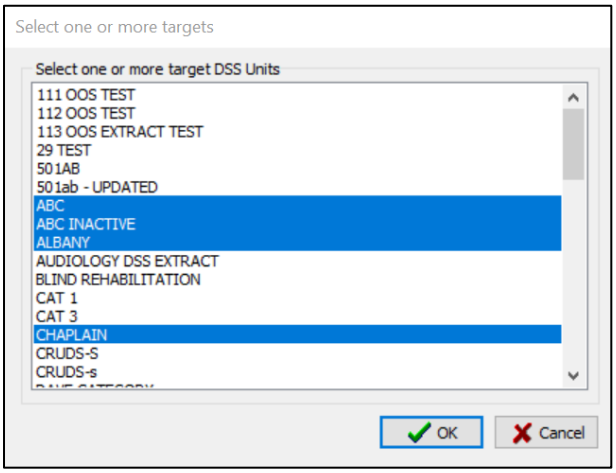
Step 2. From the menu bar, select Edit > Copy the selected EC Screen to other DSS Unit(s) (Figure 233).

Figure 233: Edit > Copy the selected EC Screens to other DSS Unit(s)



- The *Select one or more targets* screen appears (Figure 234).

Figure 234: Select One or More Target DSS Units



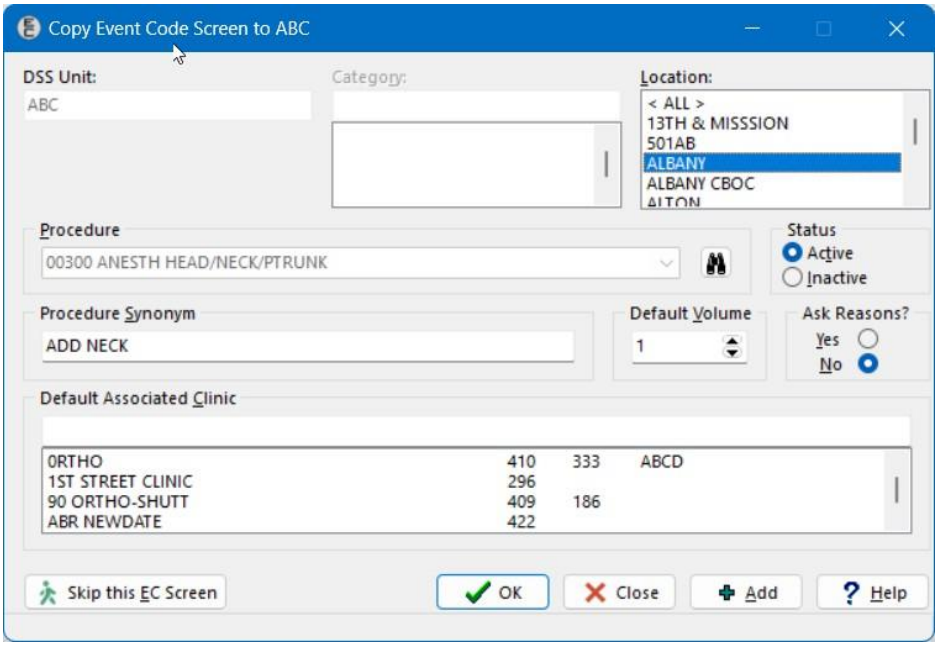
Step 3. Select one or more target DSS Units from the list, and then click the OK button.

Note:

- The target DSS Unit is usually newly created by the user, but an existing DSS Unit may also be used.
- Multiple DSS Units may be selected by holding down the <**Ctrl**> key while mouse clicking on the desired DSS Units.

The *Copy Event Code Screen to [user-selected target DSS Unit]* windows open (Figure 235) one at a time for each target DSS Unit selected in step 2, Figure 234. Follow steps 4 and 5 for each selection.

Figure 235: Copy Event Code Screen to DSS Unit



Step 4. Review the field selections and make edits (if necessary).

- The Location, Status, Procedure Synonym, Default Volume, Ask Reasons and Default Associated Clinic fields can be modified on this screen.
- The DSS Unit and Procedure cannot be edited.
- If the DSS Unit is setup to not send records to PCE, the Default Associated Clinic is disabled.

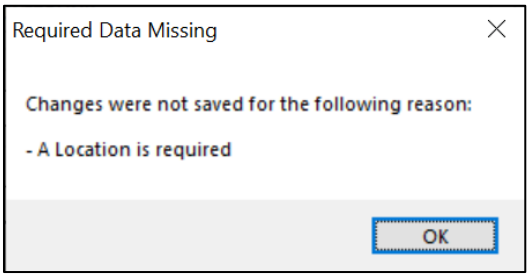
Step 5. Click the OK, Add, or Skip this EC Screen button:

- Click **OK** to save the changes and open the next *Copy Event Code Screen to [user-selected target DSS Unit]* window (Figure 235).
- Click **Add** to save the changes. To proceed to the next *Copy Event Code Screen to [user-selected target DSS Unit]* window, click the **Skip this EC Screen** button.
- Click **Skip this EC Screen** to bypass copying the Event Code Screen for the selected DSS Unit and to open the next selection.
- When the Event Code Screen is copied to all selected DSS Units, the last window will close. All changes will be saved.

Note:

- If a Location is not selected when copying an Event Code Screen, the record will not be filed, and a message dialog will be displayed (Figure 236). Click the **OK** button on the message dialog to return to the Copy Event Code Screen form to enter a Location.

Figure 236: Required Data Missing



4.4.8 Inactivate EC Screen — Identify Inactive Multiple Event Code Screens

The Inactivate EC Screen option allows the user to identify active Event Code (EC) Screens that use a selected EC product code.

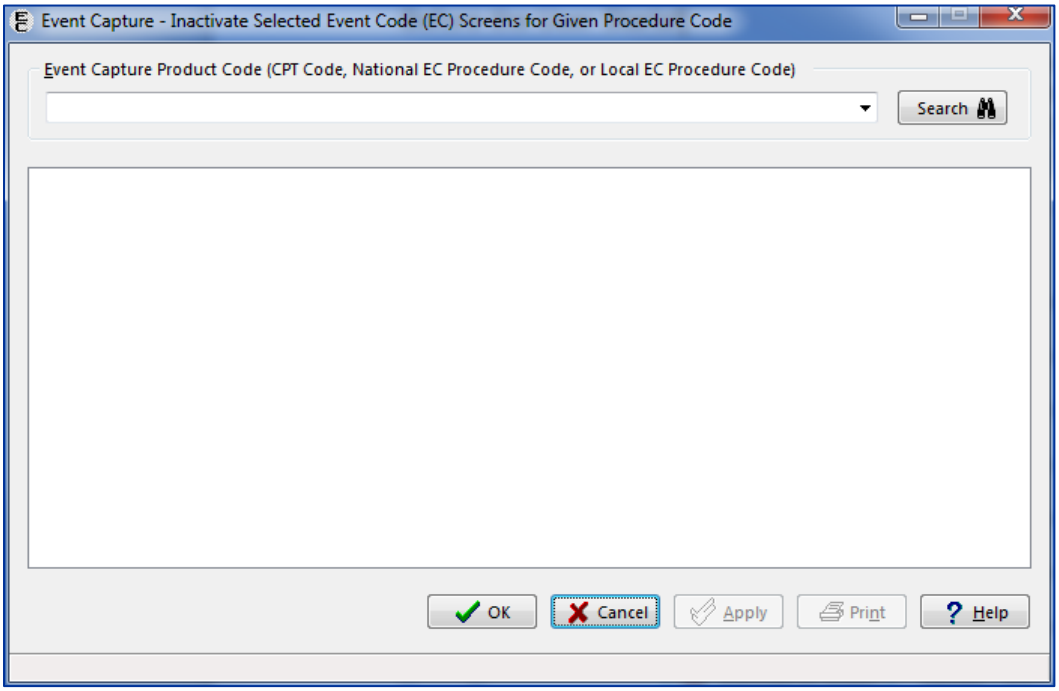
Before the User Starts

- Users with the ECMGR security key can select an EC Product Code (CPT Code, National EC Procedure Code or Local EC Procedure Code) and then display all the DSS Units using the selected Product Code on the Inactivate Selected Event Code (EC) Screens for Given Procedure Code form.
- Choose to inactivate Event Code Screens by using the checkboxes in front of each entry.
- The user can display and print a list of Event Code Screens inactivated for a chosen EC Product Code.

What the User Will See

- After clicking the **Inactivate EC Screen** button on the Management Menu, the Event Capture — Inactivate Selected Event Code (EC) Screens for Given Procedure Code form will be displayed (Figure 237).

Figure 237: Inactivate Selected Event Code (EC) Screens for Given Procedure Code

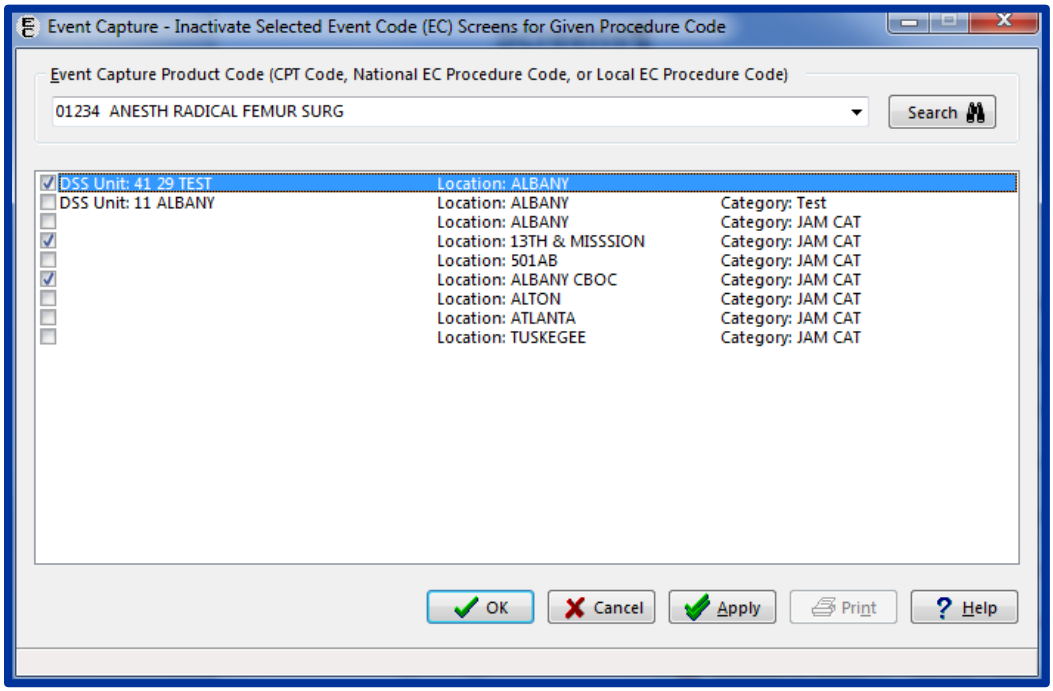


4.4.8.1 Inactivate Event Code Screen(s)

Step 1. Enter an Event Capture Product Code (CPT Code, National EC Procedure Code, or Local EC Procedure Code) in the search field and click the Search button.

- All currently active Event Capture Product Codes are available for selection.
- The associated DSS Units with IENs, Locations and Categories appear for the EC Product Code selected (Figure 238).

Figure 238: Inactivate Selected Event Code (EC) Screens with CPT Code Selected



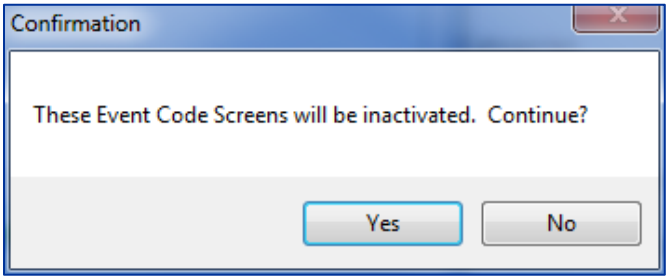
Step 2. Use the checkboxes on the left side of the screen to select entries to be inactivated.

- The user can select multiple checkboxes (Figure 238).

Step 3. Click the Apply button to apply the changes and continue working or click the OK button to apply the changes and exit the screen.

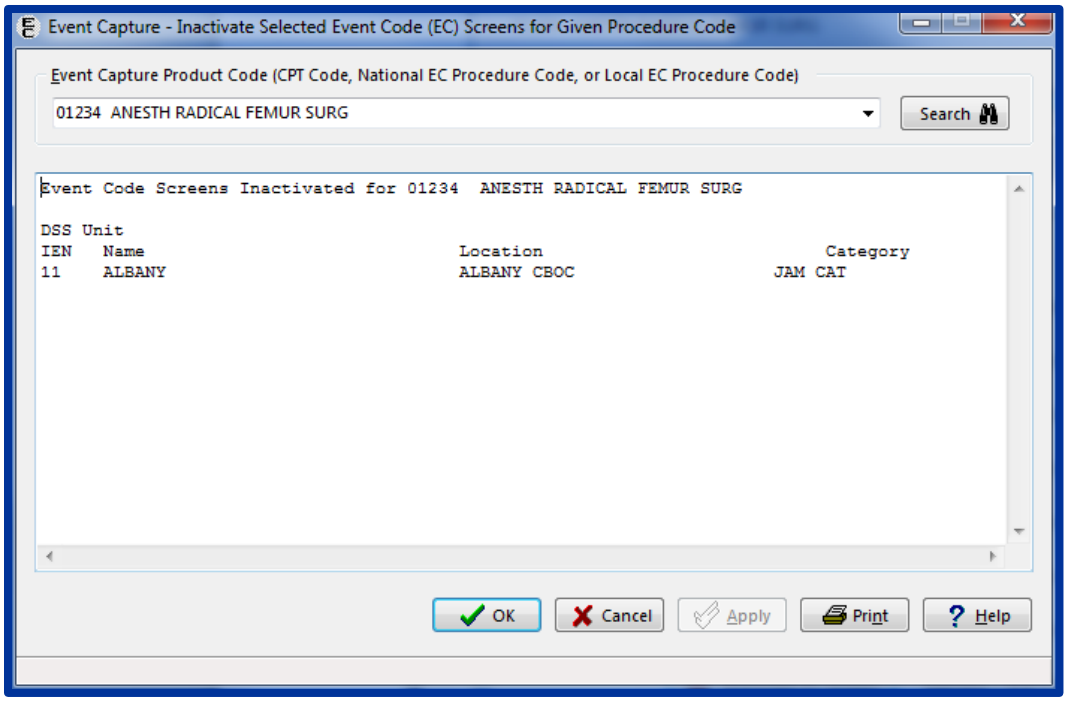
- A confirmation prompt will appear. Click the **Yes** button to continue inactivating the selections. Click No to return to the previous screen (Figure 239).

Figure 239: Confirmation Prompt



- When the user clicks **Apply**, a list of inactivated Event Code Screens is displayed (Figure 240).
- Click the **Print** button to print the list of inactivated EC screens.

Figure 240: List of EC Screens That Were Inactivated



Step 4. Click the OK button.

- The changes are applied, and the user is returned to the Management Menu.

Step 5. To verify that the Event Code Screens are inactivated, use the Inactivate Event Code Screens option, and reenter the Event Capture Product Code that was previously used.

- The list of DSS Units, Locations and Categories does not include the inactivated Event Code Screens.

4.4.9 Providers — Maintain Non-Licensed Providers

This option allows the Package Manager user to create a list of Non-Licensed Providers (i.e., staff without a Person Class). Workload for non-licensed providers can be entered for DSS Units that do not send records to PCE.

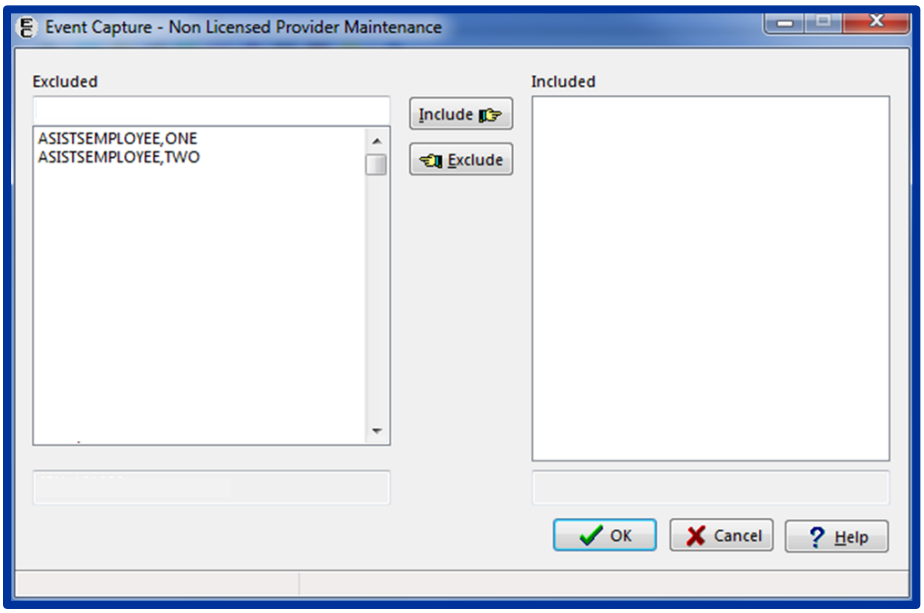
Before the User Starts

- For DSS Units that do not send to PCE, both Non-Licensed Providers (without a Person Class) and Providers (with a Person Class) may be selected as providers when entering workload.
- For DSS Units that send records to PCE (including Occasion Of Service DSS Units), staff without a Person Class may not be selected as a provider.

What the User Will See

- After clicking the **Providers** button on the Management Menu, the Non-Licensed Provider Maintenance screen will be displayed (Figure 241).

Figure 241: Non-Licensed Provider Maintenance Screen

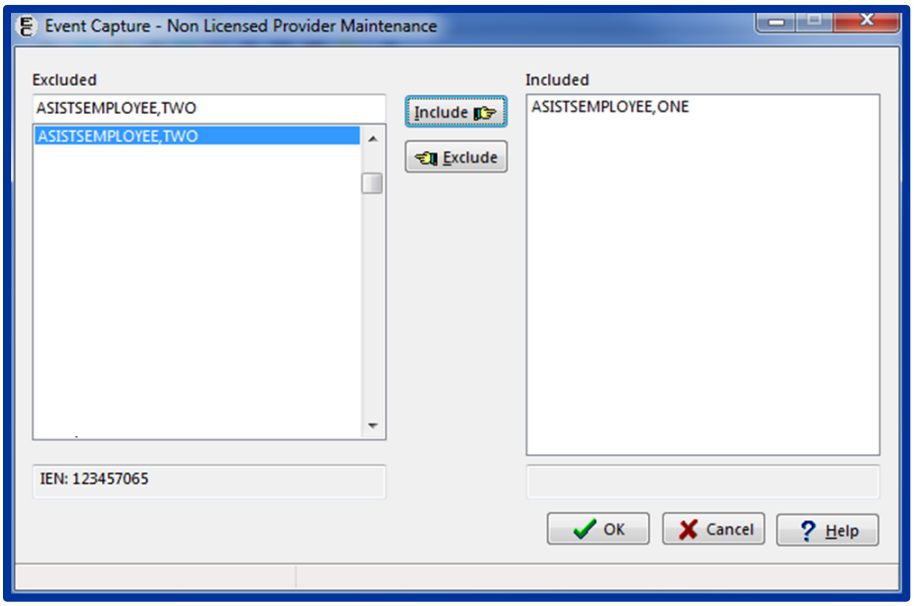


4.4.9.1 Add a Non-Licensed Provider

Step 1. Highlight a staff member name in the Excluded list box, then click the Include button (Figure 242).

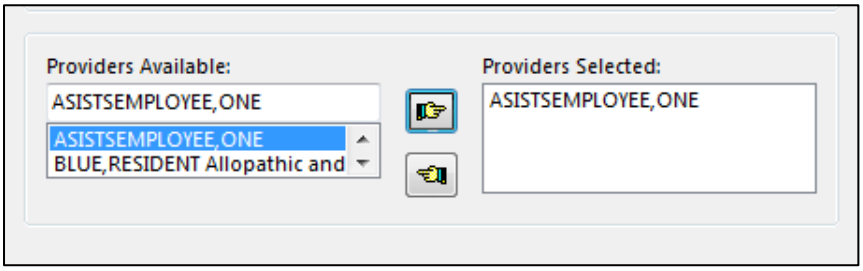
Step 2. Click OK to accept the changes.

Figure 242: Adding a Non-Licensed Provider



- Once a staff member has been added to the Included list as a non-licensed provider for any DSS Unit that does not send to PCE, this staff member will be selectable as a provider when entering workload (Figure 243).

Figure 243: Non-Licensed Provider Selection for DSS Units that Do Not Send to PCE

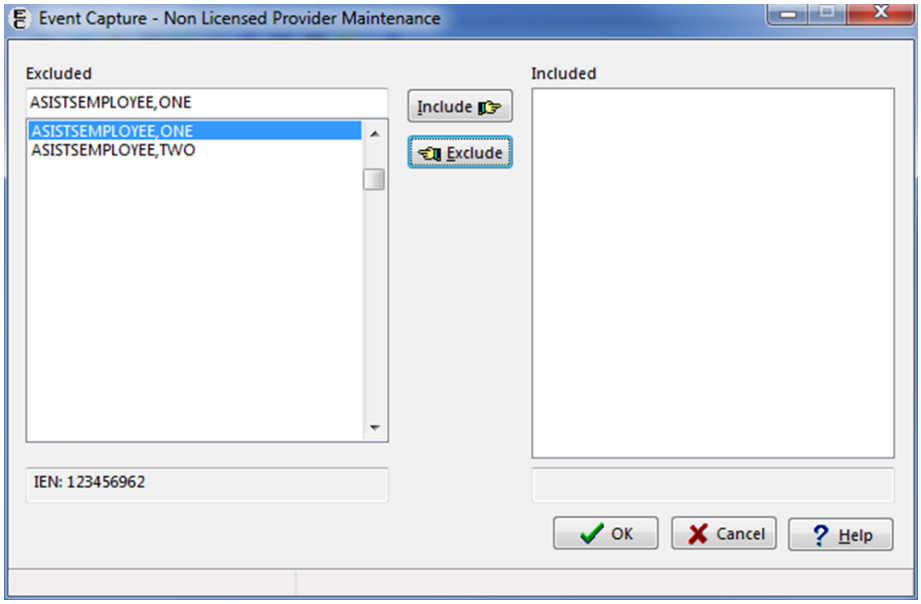


4.4.9.2 Remove a Non-Licensed Provider

Step 1. Highlight a staff member name in the Included list box, then click the Exclude button (Figure 244).

Step 2. Click OK to accept the changes.

Figure 244: Removing a Non-Licensed Provider



- Once a staff member has been added to the Excluded list and removed as a non-licensed provider, the staff member will no longer be selectable as a provider when entering workload for DSS Units that do not send to PCE.

5 Troubleshooting

The following subsections present some typical problems experienced by end users and the corresponding resolutions.

5.1 Access Issues

Users need an Access Code and Verify Code obtained from their local OIT staff to use the Event Capture GUI.

5.2 Log-On Issues

Event Capture is usually accessed through a desktop shortcut which points to the installation location. Ask the local support staff for assistance.

If Event Capture launches and then disappears or is not responding, make sure the IP address listed is correct and not blocked by firewall software for the system with which it is communicating. Local support staff is available to assist with issues.

5.3 GUI Appears Distorted

If the ECS GUI display appears to be missing scrollbars, columns, or rows, ensure that the screen resolution is set to a resolution of 1440 x 900, or greater. Settings available will be dependent upon the user's monitor size.

5.3.1 Example of Setting the Screen Resolution to 1920 x1080

Step 1. Right-click anywhere on the computer's desktop to open the Desktop Context Menu (Figure 245).

Step 2. Select Display settings from the menu to open the window shown in Figure 246.

Figure 245: Desktop Context Menu — Display Settings

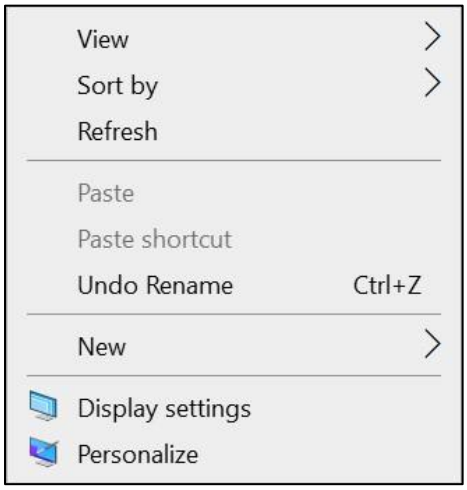
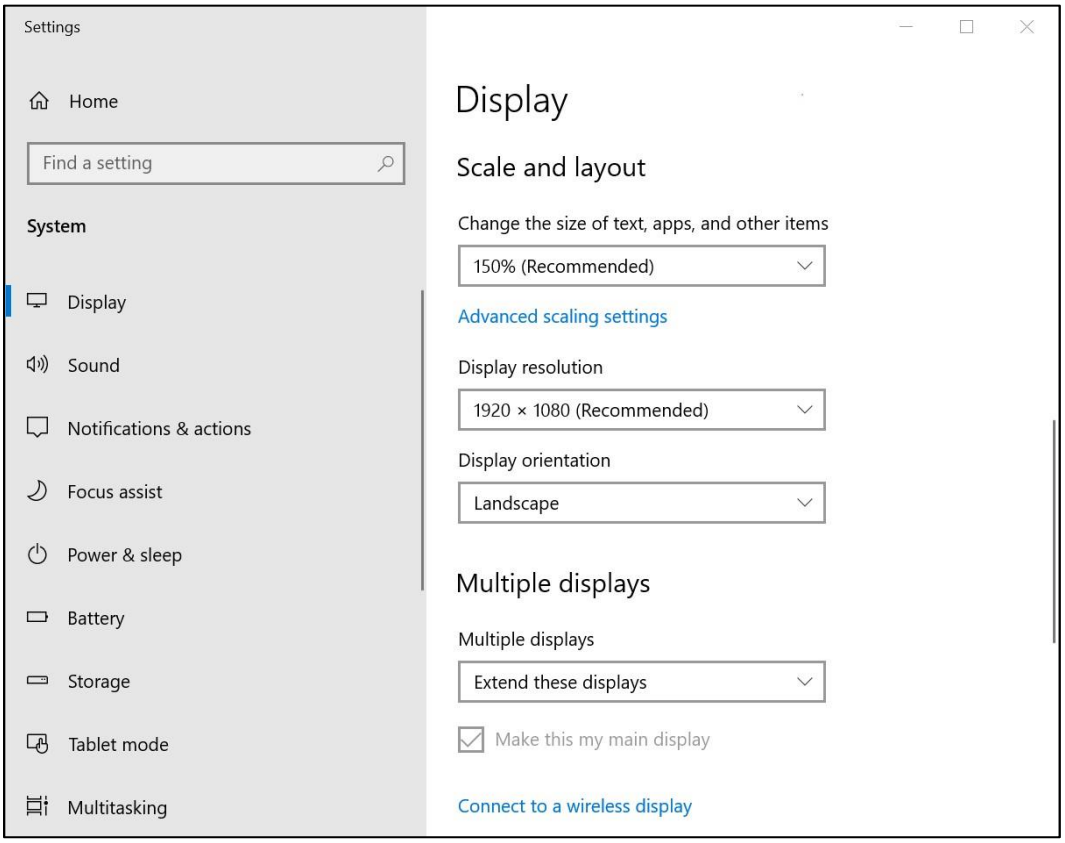


Figure 246: Windows Display Resolution Settings



Step 3. Scroll down to view Scale and Layout settings.

Step 4. Select 1920 x 1080 from the Display Resolution dropdown menu.

Note:

- Depending on the user's version of Windows, this may look different.

Appendix A Acronyms and Abbreviations

Table 3 lists the acronyms and abbreviations used throughout the ECS User Guide.

Table 3: Acronyms and Abbreviations

Acronym	Description
2FA	Two-Factor Authentication
AC	Application Coordinator
ADPAC	Automated Data Processing Application Coordinator
CCOW	Clinical Context Object Workgroup
CHAR4	A 4-character code
CM	Clinical Modification
CPRS	Computerized Patient Record System
CPT	Current Procedural Terminology
DSS	Decision Support System
Dx	Diagnosis
EC	Event Capture, also Event Code
ECACCESS	Security Key — Event Capture Access
ECALLU	Security Key — Event Capture All DSS Units
ECMGR	Security Key — Event Capture Manager
ECNORPT	Security Key — Event Capture No Reports
ECPATIENT	Event Capture Patient
ECPROVIDER	Event Capture Provider
ECS	Event Capture System
ECSPSH	Security Key — Event Capture Spreadsheet
FY	Fiscal Year
GUI	Graphical User Interface
ICD	International Classification of Diseases
ID	Identification
IEN	Internal Entry Number
IPC	Inactive Person Class
MAS	Medical Administration Service
MCA	Managerial Cost Accounting
MCAO	Managerial Cost Accounting Office
NPCD	National Patient Care Database
OIT	Office of Information and Technology
PCE	Patient Care Encounter
PIMS	Patient Information Management System

Acronym	Description
PIV	Personal Identification Verification
SC	Service Connected
SSN	Social Security Number
SSO	Single Sign-on
T&TC	Section 508 Accessibility Testing and Training Center
VA	Veterans Affairs
VAMC	Veterans Affairs Medical Center
VDL	VA Software Document Library
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture

Appendix B Glossary

Table 4 lists some of the terms used throughout the ECS FY24 User Guide.

Table 4: Glossary of Terms

Term	Description
Associated Clinic	The Associated Clinic of the Event Capture (EC) Procedure. CLINIC IEN is retrieved from the ASSOCIATED CLINIC field (#26) of the EVENT CAPTURE PATIENT file (#721).
Associated Stop Code	The Stop Code that most closely represents the DSS Unit workload.
Category	Category provides Event Capture a common level to group associated procedures. Multiple procedures can be defined for each category.
CCOW	In the context of health informatics, CCOW is a Health Level 7 international standard protocol designed to enable disparate applications to synchronize in real time, and at the user interface level.
CHAR4 Code	A 4-character code value of the associated clinic as specified from the DSS Clinics and Stop Code Worksheet File.
Combat Veteran	Identifies if patient served in a combat zone. Veteran must have served in active duty in a theatre of combat operations during a period of war after the Persian Gulf War or in combat against a hostile force during a period of hostilities after November 11, 1998.
Computerized Patient Record System (CPRS)	Parameters are set up/maintained by the facility's CPRS Coordinator/Clinical Application Coordinator (CAC).
Cost Center	Cost Center reveals which service is using this DSS Unit.
Credit Stop Code	The Credit Stop Code (from the HOSPITAL LOCATION file [#44]) as determined by Medical Administration Service (MAS). This is a DSS Identifier assigned to a clinic and may be utilized in several ways. We can use it to identify different provider types (NP, PA, Psychologist, etc.) and for various program groups (Care Coordination, Telemedicine, etc.), or to give additional credit to a second service in a joint clinic. DSS further uses credit stop codes to create unique feeder keys to identify clinic intermediate products. Examples are: 123 — Nutrition Individual, 124 — Nutrition Group, 372 — MOVE! Individual, 373 — MOVE! Group.
Current Procedural Terminology (CPT) code	CPT codes are published by the American Medical Association. The purpose of the coding system is to provide uniform language that accurately describes medical, surgical, and diagnostic services.
Current Procedural Terminology (CPT) Modifier	CPT modifiers provide the ability to refine CPT procedure codes to better reflect procedures performed.
DSS Unit	A DSS (Decision Support System) Unit defines the lowest level segment used for tracking hospital resources. These units can be a small work unit within a service or a large division within a service. Management at each facility is responsible for tailoring the DSS Units to fit its resource/cost reporting.
DSS Unit Number	This code is used for additional identification of DSS Units.

Event Capture	Software designed to provide management tools necessary in tracking procedures not entered in other VistA packages.
Event Code Screen	Event Code Screens are unique combinations of location, DSS Unit, category, and procedure that define patient procedures.
Graphical User Interface (GUI)	A type of display format that enables users to choose commands, initiate programs, and other options by selecting pictorial representations (icons) via a mouse or a keyboard.
ICD-10-CM	International Classification of Diseases, Tenth Revision, Clinical Modification codes (based on the World Health Organization codes).
Internal Entry Number (IEN)	The number used to identify an entry within a file. Every record has a unique internal entry number.
Ionizing Radiation (ION RAD)	Exposure to ionizing radiation.
Location	Initializing the user site as a location, the Event Capture software recognizes the user facility as a valid location to enter Event Capture data.
Medical Administration Service (MAS)	Now Patient Information Management System (PIMS).
Ordering Section	The medical section ordering the patient's procedure.
Patient Care Encounter (PCE)	The VistA Outpatient Encounters System. PCE builds a single encounter for each recorded instance of a patient receiving services within a clinic. PCE is the mechanism for the transmission of all encounter data to the National Patient Care Database (NPCD). For outpatient encounters, DSS combines all instances with the same SSN, Date, and Primary Stop code into one outpatient encounter. However, on DSS, each of the clinic encounters of PCE appears as a resource utilization unit under the one encounter. This means that in DSS, a single outpatient encounter will be built by two or more records when they have a common encounter number. The PCE column reflects if workload is set to pass to PCE. Values include: All — Send all records OOS — Send Occasion Of Service records No — Send no records.
Patient Information Management System (PIMS)	The Scheduling module of the PIMS Package provides for efficient and accurate collection, maintenance and output of data that allows VA Medical Centers to provide timely and quality care to its patients.
Procedure	A specific function performed on, or service provided to, a patient. Multiple procedures can be associated with a single category.
Procedure Reason	A method of generically grouping patient procedures to further describe the event, often giving patient or provider information.
Procedure Synonym	See Synonym
Provider	The provider of care performing the procedure. This provider can be a doctor, nurse, technician, or any designated team of medical professionals.
Reason	See Procedure Reason
Security Key	Security Keys set a layer of protection on the range of computing capabilities available with a particular software application. The availability of options is based on the level of system access granted to each user.

Service Connection	The service connection (SC) box on the Enter/Edit Patient Data screen in ECS must be answered if it displays as a required option for that patient. Adjudicated service connection means that the facts, shown by evidence, establish that a particular injury or disease resulting in disability was incurred coincident with service in the Armed Forces, or if preexisting such service, was aggravated therein.
Southwest Asia Conditions	Patient encounter is related to exposure to Southwest Asia conditions while serving in the Southwest Asia Theater of operations.
Station Number	A Station Number uniquely identifies every VA primary facility and division; however, entries for some facility types do not have Station Numbers. Station Numbers are stored in Field #99 in the VistA M Server INSTITUTION file (#4).
Stop Code	A three-digit number that is used in VHA to identify the services that a patient receives at a Department of Veterans Affairs (VA) medical facility. Stop codes are also used to capture workload statistics. A stop code could either be classified as a primary or secondary stop code, (which is referenced as credit stop code). The Stop Code (from the HOSPITAL LOCATION file [#44]) as determined by Medical Administration Service (MAS).
Synonym	A locally recognized name or description for a procedure. In VistA, this is a field in the OPTION file (#19). Options may be selected by their menu text or synonym.
T&TC	Section 508 Accessibility Testing and Training Center.
Unit IEN	The internal entry number (IEN) for this record. The number to identify this DSS unit locally at the user's site (1 to 14 characters). The same DSS Unit number can be used for more than one DSS Unit.
Verify Code	A secret password used along with the Access Code to provide secure user access to the VistA M Server. It is used by Kernel's Sign-on/Security system along with the Access code to validate the user's identity.
VistA	Veterans Health Information Systems and Technology Architecture (VistA) is the proprietary software developed for and used by the VA VHA to support its clinical and administrative functions at VA sites nationwide. It is both client- and server-based software. The client-based software is written in Java, Borland Delphi Pascal, and other GUI-based languages and runs on the Microsoft operating system. The server-based software is written in the M programming language and, via Kernel, runs on all major M implementations regardless of the vendor. It is composed of integrated clinical, infrastructure, and financial/administrative software applications. This internally developed portfolio of applications is recognized as the most comprehensive integrated health information system in the United States.
Volume	Volume is usually associated with the number of procedures performed. This field can also be used to track number of bed days, or to track time increments spent performing the procedure. For example, if "15-minute increment" is the unit, volume of 1 = 15 minutes, volume of 2 = 30 minutes, etc.

Appendix C ECS Package Administrative Messages

Set up an ECS mail group in VistA to receive relevant ECS notifications. Contact IT to set up a VistA ECS Mail Group so more than one person receives ECS administrative messages.

Examples of ECS package administrative email messages included in this section:

- When a new ECS patch is released
- When a patch updating the National Procedure Codes is released
- When Event Code Screens are inactivated due to changes in National Procedure Codes
- When terminated users result in access to DSS Units being affected
- When a DSS Unit with no workload is deleted
- When an Event Code Screen with no workload is deleted

When a new ECS patch is released

Figure 247 is a screen capture of an example of the email message a user could receive when an ECS patch is released.

Figure 247: Example Email Message when an ECS Patch is Released

```
Subj: Released EC*2*XXX SEQ #XXX  [#XXXXXXX] 7 Jul 2020 07:32:33 -0400 (EDT)
1149 lines
From: <REDACTED EMAIL>  In 'IN' basket.   Page 1
-------------------------------------------------------------------------------
$TXT Created by REDACTED at <REDACTED EMAIL>  (KIDS) on Thursday,
 02/20/20 at 15:08
===============================================================================
Run Date: JUL 07, 2020                     Designation: EC*2*XXX
Package : EC - EVENT CAPTURE                  Priority: Mandatory
Version : 2       SEQ #XXX                      Status: Released
                  Compliance Date: MMM DD, YYYY
===============================================================================

Associated patches: (v)EC*2*XXX    <<= must be installed BEFORE `EC*2*XXX'

Subject: Event Capture FY 20 Sustainment

Category:
  - Routine
  - Data Dictionary
  - Other


Type <Enter> to continue or '^' to exit:
```

When a patch updating the National Procedure Codes is released

Figure 248 is an example of the email message a user could receive when a patch that updates National Procedure Codes is released.

Figure 248: Example Email Message for Updated National Procedure Codes Patch

```
Subj: Released EC*2*XXX SEQ #XXX  [#XXXXXXX] 25 Mar 2021 12:46:54 -0400 (EDT)
1102 lines
From: <REDACTED EMAIL>  In 'IN' basket.   Page 1  *New*
-------------------------------------------------------------------------------
$TXT Created by REDACTED at <REDACTED EMAIL>  (KIDS) on Friday, 02/0
5/21 at 12:06
===============================================================================
Run Date: MAR 25, 2021                    Designation: EC*2*XXX
Package : EC - EVENT CAPTURE                 Priority: Mandatory
Version : 2       SEQ #XXX                     Status: Released
                  Compliance Date: MMM DD, YYYY
===============================================================================

Associated patches: (v)EC*2*XXX    <<= must be installed BEFORE `EC*2*XXX'

Subject: FY21 MID-YEAR UPDATE FOR EC NATIONAL PROCEDURE (#725) FILE

Category:
  - Routine

Description:
============

 This patch updates forty-four (44) procedure codes to reflect Fiscal Year
 2021 mid-year changes, effective April 1, 2021.

 The Managerial Cost Account Office has shared the details of the changes
 with the ECS Coordinator at the site.

 ***************************************************************************

 NOTE: This patch is being released with a shortened compliance date of
       MM/DD/YYYY and should be installed as close to Close of Business
       (COB) on MM/DD/YYYY as possible, but not after MM/DD/YYYY.

 ***************************************************************************
```

When EC Screens are inactivated due to changes in National Procedure Codes

When an EC NATIONAL PROCEDURES file (#725) patch is loaded, a review of the EVENT CODE SCREENS file (#720.3) is performed. Event Code Screens, which have either inactive CPT or procedure codes, or a procedure code with an inactive “default” CPT code attached, are reported.

Figure 249 is a screen capture of an example of the message a user could receive stating that Event Code Screens should be reviewed due to changes in the EC NATIONAL PROCEDURES file (#725).

Note:

After a patch updating file #725:

- Check for Inactivated National Procedure Codes.
- Check for Event Code Screens with out-of-date procedure codes.

Figure 249: Example of Event Code Screens to Review Message

```
From: <EMAIL ADDRESS PROTECTED>
Sent: Monday, MONTH DD, YYYY 9:00 PM
To: Package Manager
Subject: Event Code Screens to Review

Please forward this message to your local DSS Site Manager or Event Capture
ADPAC.

A review of the EC EVENT CODE SCREENS file (#720.3) was done after
installation of patch EC*2*XX which updated the EC NATIONAL PROCEDURE file
(#725).  This message provides the results of that review.

The EC EVENT CODE SCREENS file (#720.3) records indicated below point to an
inactive record in the EC NATIONAL PROCEDURE file(#725) or to an inactive
record in the CPT file (#81).

The user should use the Inactivate Event Code Screens [ECNACT] option to
inactivate the Event Code Screen.  If necessary, a new Event Code Screen can
be created using a currently active CPT code or National Procedure.

The CPT procedure for the following Event Code Screen (XXX-X-X-XXXXX) is
inactive --
  Location:  VAMC
  Category:  Treatment
  DSS Unit:  E-KINESIOTHERAPY-IP
  Procedure: PROSTHETIC TRAINING (97520)

The CPT procedure for the following Event Code Screen (XXX-X-X-XXXXX) is
inactive --
  Location:  VAMC
  Category:  Treatment
  DSS Unit:  E-KINESIOTHERAPY-IP
  Procedure: PROSTHETIC CHECKOUT (97703)

The CPT procedure for the following Event Code Screen (XXX-XX-X-XXXXX) is
inactive --
  Location:  VAMC
  Category:  None
  DSS Unit:  PSYCHOLOGY-IP
  Procedure: PSYCHOLOGICAL TESTING (96100)
```

When terminated users result in access to DSS Units being affected

Figure 250 is a screen capture of an example of the email message a user could receive when an ECS User is terminated.

Figure 250: Example 1 — ECS User Terminated Email Message

```
Example 1
Subj: Removed Terminated Users from DSS UNIT Access [#XXXXXXXX] MM/DD/YY@02:30 8 lines
From: EVENT CAPTURE In 'IN' basket.  Page 1 *New*
-------------------------------------------------------------------------
Event Capture - Terminated Users removed from DSS UNITS

Total number of Terminated users: 1

DSS UNITS        NAME of Terminated User Removed from DSS UNIT
-------------------------------------------------------------------------
CHAPLAINS        Facility Staff Name

Enter message action (in IN basket): Delete//
```

Figure 251 is a screen capture of another example of the email message a user could receive when an ECS User is terminated.

Figure 251: Example 2 — ECS User Terminated Email Message

```
Example 2
Event Capture - Terminated Users removed from DSS UNITS

Total number of Terminated users: 1

DSS UNITS           NAME of Terminated User Removed from DSS UNIT
-----------------------------------------------------------------
HCBC REFERRALS/STATS PROVIDER1, EC

HCBC STAFF PHONE    PROVIDER1, EC

HCBC STAFF PHONE NOT W/PT PROVIDER1, EC

HCBC VA STAFF       PROVIDER1, EC

SOCIAL WORK - INPATIENT PROVIDER1, EC

SOCIAL WORK - OUTPATIENT PROVIDER1, EC

SOCIAL WORK-C&P     PROVIDER1, EC

SOCIAL WORK-GEM     PROVIDER1, EC
```

When a DSS Unit with no workload is deleted

Figure 252 shows an example of the automated MailMan message that arrives with the subject "DELETION OF UNUSED DSS UNIT FROM FILE #724". The accompanying message lists the deleted DSS Unit.

Figure 252: Example Message when a DSS Unit is Deleted

```
Subj: DELETION OF UNUSED DSS UNIT FROM FILE #724
01/04/22@06:45  10 lines
From: EVENT CAPTURE PACKAGE  In 'IN' basket.   Page
1
-------------------------------------------------
The following DSS Unit and its associated Event
Code Screens have been deleted, it had no workload
associated with it.

DSS UNIT: DSS-UNIT-NAME
  LOC: DSS-UNIT-LOCATION         PROC: NAME (00000)
  CAT: None                      SYN: NAME
  DEFAULT ASSOCIATED CLINIC:
  STATUS: Active
```

When an Event Code Screen with no workload is deleted

Figure 253 shows an example of the automated MailMan message that arrives with the subject "DELETION OF UNUSED EVENT CODE SCREENS FROM File #720.3". The accompanying message lists the deleted Event Code Screen(s).

Figure 253: Example Message when Event Code Screens are Deleted

```
Subj: DELETION OF UNUSED EVENT CODE SCREENS FROM
File #720.3
12/13/21@06:45  9 lines
From: EVENT CAPTURE PACKAGE  In 'IN' basket.   Page
1
-------------------------------------------------
The following Event Code Screen has been deleted,
it had no workload associated with it.

DSS UNIT: DSS-UNIT-NAME
  LOC: DSS-UNIT-LOCATION         PROC: NAME (00000)
  CAT: None                      SYN: NAME
  DEFAULT ASSOCIATED CLINIC:
  STATUS: Active
```