Patient Representative V. 2.0 User Manual
July 1995
Revised June 2002

Revision History

Initiated on 11/9/04

Date	Description (Patch # if applic.)	Project Manager	Technical Writer
11/9/04	Manual updated to comply with SOP 192-352 Displaying Sensitive Data		REDACTED

Introduction

A focus of the Patient Representative Program, which can be accomplished through this software package, is to ensure the medical center responds to patient needs. This package offers the opportunity to track and trend compliments and complaints and to measure a medical center's types of complaints as they relate to the Customer Service Standards, the Quality Matrix, and the National Patient Satisfaction Survey.

Overview

This software package was developed to support the Patient Representative with the collection and categorization of complaints and compliments. The issue codes provide the opportunity to track types of complaints and provide trends of specific complaints. Included within the issue codes are all the Customer Service Standards and the definitions of quality identified in the VHA definition of quality within the Quality Matrix. The software package provides the opportunity to measure the veteran's complaints and perceptions of a medical center related to those two areas. The clinical and administrative issues identified in the National Patient Surveys were included in the issue codes, which can provide a correlation between the "biased" complaint and the findings from the "unbiased" survey.

Functional Description

The Patient Representative software package is designed to support the following actions.

- Entering and editing contact information
- Sending Reports of Contact via the Alert System
- Tracking contacts that have responses due
- Printing various lists, statistical reports, and ad hoc reports

Orientation

The format of this manual is summarized in the Table of Contents. The Glossary defines general terms relevant to the software.

On-Line Documentation
On-line documentation is provided in the form of Help throughout the program. If at any time you become unsure of how to respond to a prompt, simply enter **?**, **??**, or **???** to obtain more information. Generally this package provides all on-line documentation for individual prompts by entering **?** or **??**.

To obtain brief descriptions of each option within a menu, enter **???** following the *Select....Menu Option* prompt. Description of the menu options can also be found at the beginning of the Package Operation section and throughout the instructional portion of this manual.

Issue Code Definitions
Whenever you are at the *Issue Code* prompt in either the Enter New Contact option or the Edit Contact Record option, you can enter a single "?" plus the issue code to obtain the definition for the issue code.

Division Prompt
The Division field in the Patient Representative package points to locations set up at the local site such as Outpatient Clinics, Medical Centers that have been integrated into one database, etc.

Alerts

Receiving Alerts
Alerts show up as soon as the user logs on. Whenever there are active Patient Representative alerts waiting for a recipient, they will appear in the following manner.

```
Reports Menu ...
Set-up and Maintenance Menu ...

You have PENDING ALERTS
          Enter  "VA   VIEW ALERTS     to review alerts

Select Patient Representative Manager Menu Option: VA  View Alerts

 1.   New Patient Representative report of contact entered (140.950021).
 2.   New Patient Representative report of contact entered (140.950020).
          Select from 1 to 2
          or enter ?, A, I, P, M, R, or ^ to exit: 1

Alert action:  (R/I/D/P): Print// <RET>

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

Printing Alerts

The recipient can print a hard copy of the Report of Contact (ROC) associated with the alert or bring it to the screen to view.

```
** This information is not for the Patient Record **

                           Report of Contact              Date: FEB 02, 1995

Contact Number:    140.950021                Date of Contact:  FEB 01, 1995
Patient Name:      PRPATIENT,ONE             Patient SSN:      666456789
Treatment Status:  Inpatient                 Location of Event:4 West
Name of Contact:   Mr. Tester                Phone of Contact:
Source of Contact: Ward Visit                Info taken by:    PREMPLOYEE,ONE
Date Due:          FEB 3,1995
Refer To:          PREMPLOYEE,TWO
                   PREMPLOYEE,THREE


Issue Text:
   This patient felt very strongly that he has not been included in any
   decisions concerning his treatment.  He states that only his wife has been
   consulted.
   He also states that he is diabetic and yet he receives dessert and fatty
   foods on his trays.
```

Responding to Alerts
If you time out while entering a response, the response is saved for 2 weeks for editing. If at the end of 2 weeks, you have not completed the response and saved it, the response is terminated. No response is laid into the RESOLUTION COMMENTS field unless it is saved by the person sending the response (note "Saving text..." below). Also once a response is saved, the sender cannot edit it again. It can be edited by the Patient Representative using the Edit Contact Record option.

```
Alert action:  (R/I/D/P): Ignore// Respond


==============================================================================
M======T=======T=======T=======T=======T=======T=======T=======T=======T====T
(Press PF1 then H for help)[ INSERT  ][ WRAP ]<  >
This problem was managed...


Saving text ...

Saving your response, please wait . . . Done
```

Ignoring Alerts
After reading the ROC, you can enter ignore at the *Alert action* prompt. This will hold the alert until a later date when you may wish to enter a response.

```
 1.   New Patient Representative report of contact entered (140.950020).
          Select from 1 to 1
          or enter ?, A, I, P, M, R, or ^ to exit: 1

Alert action:  (R/I/D/P): Print// Ignore
```

Deleting Alerts
You may delete the alert if you have no need to respond, as in cases where a ROC is sent for information purposes only.

```
 1.   New Patient Representative report of contact entered (140.950020).
          Select from 1 to 1
          or enter ?, A, I, P, M, R, or ^ to exit: 1

Alert action:  (R/I/D/P): Print// Delete

          Reports Menu ...
          Set-up and Maintenance Menu ...

Select Patient Representative Manager Menu Option:
```

Information Only Alerts
Whenever you respond to an alert, an Information Only alert is sent back to the originator of the ROC. Notice the "I" following the number one, designating this alert as Information Only.

```
1.I  Patient Rep response by TWO,TEST to 140.950020.
          Select from 1 to 1
          or enter ?, A, I, P, M, R, or ^ to exit: ??

YOU MAY ENTER:
   A number in the range 1 to 1 to select specific alert(s)
   for processing.
   A to process all of the pending alerts in the order shown.
   I to process all of the INFORMATION ONLY alerts, if any, without further
   ado.
   P to print a copy of the pending alerts on a printer
   M to receive a MailMan message containing a copy of these pending alerts
   R to Redisplay the available alerts
   ^ to exit

      Select from 1 to 1
      or enter ?, A, I, P, M, R, or ^ to exit: I

Processed Alert Number 1
    Patient Rep response by TESTER,ONE to 140.950020.
```

Package Management

Patient Representative records produced by this software are not to be placed in the patient's medical or administrative record.

Documents produced by the Patient Representative are not considered to be confidential Quality Management documents under 38 U.S.C. 5705 and its implementing regulations. In general, the patient has a right to know what happened as a result of the complaint he brought to medical center staff or the Patient Representative.

Documents may be confidential under other legislation such as 38 U.S.C. 5701 which protects the identity of VA patients. Please consult the Release of Information Officer before releasing information to any non-VA individual, except the patient who made the complaint.

If a study or review following a patient complaint is likely to produce sensitive, confidential information, that study or review should be designated a Focused Review. This generates confidential documentation at the outset.

Package Operation

Overview

Enter New Contact
This option creates a new record in the CONSUMER CONTACT file (#745.1).

Edit Contact Record
This option allows you to edit an open consumer contact record.

Open/Close/Delete Contact Record
This option lets you open a consumer contact record that has been closed; close a record; or delete a record.

Contact Inquiry
This option displays the data for a single record or all records in a date range.

Responses Due
This option provides a list of contact records whose response due date is within a selected date range.

Send or Kill an Alert
This option can be used to send a new alert for a Report of Contact or to kill an alert.

Reports Menu

Ad Hoc Report
This option lets you design your own report by sorting and printing from the CONSUMER CONTACT file (#745.1) to your specifications.

Contacts with No Patient Identified
This option prints a list of contact records that do not have a patient name associated with the contact.

Daily List of Patient Contacts
This is a list of contacts by date.

List of Open Cases
This option provides a list of open cases for a selected date range.

Patient Name with Brief Data
This option provides a brief summary of a selected patient's contacts.

Report by Employee
This option prints contact data for any involved employee over a selected date range.

Report of Contact
This option allows you to print/display a Report of Contact to a printer or screen.

Statistical Reports Menu

Discipline Contact Totals
This option counts the number of contacts for each discipline over a selected date range.

Discipline Issue Totals
This option provides totals of all issues for each discipline over a selected date range.

Service/Discipline Contact Totals
This report totals contacts by service/discipline.

Service/Discipline Issue Totals
This option totals issue codes for each service/discipline.

Spreadsheet Report
This option prints various spreadsheet reports using a comma as a delimiter.

Customer Service Standards Report
This option tallies the number of Reports of Contact logged with each Customer Service Standard.

Employee Contact Totals
This option counts the number of contacts for each employee over a selected date range.

Issue Totals for All, Male, or Female
This option prints issue totals for a selected date range, for either all records, records with male patients or records with female patients.

Location Issue Totals
This option prints the total of number of issues for a date range sorted by hospital location.

Old Service/Section Contact Totals
This option prints the total contacts for each service. The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997.

Old Service/Section Issue Totals
This option provides totals of all issues for each service for a date range. The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997.

Set-up and Maintenance Menu
This menu contains the options used to manage key allocation, archive data, add congressional contacts, purge records, and edit site parameters. It contains the following options.

Add New Service/Discipline
This option allows the user to add new entries into the SERVICE/DISCIPLINE file (#745.55) or to edit existing entries.

Archive Report
This option prints brief data on each record within the selected date range. The data can be saved to a file, captured to a word processing package to save on a floppy, or sent to a printer for a hard copy.

Congressional Contact Enter/Edit
This option is used to enter congressional offices/names if the site wants to track contact data for specific congressional contacts.

Issue Code Enter/Edit
This functionality is no longer available. Issue codes can no longer be entered or edited. Only national issue codes are valid. The Issue Codes List will periodically be evaluated and updated.

Patient Representative Keys
This option is used to assign/unassign the security keys in the Patient Representative package.

Purge Contact Records
This option allows you to purge (delete) a range of records from the database.

Site Parameters Edit
This option is used to edit the site parameters associated with the Patient Representative package.

Manual Rollup
This option allows you to manually run the Patient Representative database rollup.

Enter New Contact

The Enter a New Contact option is used to create a record for a contact. Since all package reports are based on data in the contact record, as much data as is available should be entered.

The following is an explanation of some of the prompts that may appear in this option.

DIVISION – A list of choices will display, including CBOCs, integrated Medical Centers, etc.

TREATMENT STATUS - Appears only if a patient name is entered.

INFORMATION TAKEN BY - A list of choices for this prompt can be created through the Patient Representative Keys option by assigning the Patient Rep Info Taker Key to those individuals who should be authorized to take information.

CONTACT MADE BY - If CO (congressional) is entered at this prompt, the *Congressional Contact* prompt will also appear.

LOCATION OF EVENT - Choices are from the HOSPITAL LOCATION file (#44).

Select EMPLOYEE - Employee allegedly involved in the issue or the employee receiving the compliment.

Select REFER CONTACT TO - If you have turned on the *Automatic ROC Alert* site parameter, the entry in this field will receive an alert message containing the ROC.

RESOLUTION COMMENTS - If the resolution of the issue is known at this time, enter it here. If not, you may enter it at a later time through the Edit Contact Record option.

INTERNAL APPEAL - Should this complaint, not settled at the local level, be referred to the Internal Appeals team for resolution?

Edit Contact Record

This option allows you to edit any open contact record. If you need to edit a closed record, first open it using the Open/Close/Delete Contact Record option.

If the site parameter to display the issue codes is set to YES, you will see them displayed here.

Open/Close/Delete Contact Record

This option provides the ability to open a closed record, close an open record, or delete a record. Deleting a record purges it from the database.

At the *Contact Number* prompt, you may enter the last 4 numbers of the contact number, the date of the contact, or the patient name (if a patient is associated with the contact).

Contact Inquiry

This option is used to view the content of a single contact record or all records contained in a user-selected date range.

At the *Contact Number* prompt, you may enter the last 4 numbers of the contact number, the date of the contact, or the patient name (if a patient is associated with the contact).

Responses Due

This option provides a list of contact records whose response due date is within a selected date range.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Send or Kill an Alert

This option is used to send a ROC via the Alert System to one or more individuals. Note that the contents of the RESOLUTION COMMENTS field does not get sent with a ROC alert.

An alert remains active for the recipient unless the recipient kills (deletes) the alert, responds to the alert and saves it, you kill the alert, or IRM deletes the alert after it is 2 weeks old. Active means that whenever the recipient of the alert logs on s/he will receive the following:

```
You have PENDING ALERTS
          Enter "VA   VIEW ALERTS    to review alerts
```

When "VA" is entered at a menu selection prompt, the recipient receives a list of all pending alerts including ones for ROCs. ROC alert messages look similar to the following. Newer alerts appear at the top of the list.

```
1.  New Patient Representative report of contact entered (140.950026)
2.  New Patient Representative report of contact entered (140.950006)
```

You may send as many ROC alerts as you want to as many recipients as you want. If you send the same ROC alert to the same person, and the first alert is still active, that person will have two alerts with the same ROC.

If two recipients have active alerts for a single ROC and you use the kill an alert action, it will kill the alert only for the person or persons you select.

Reports Menu
Ad Hoc Report

The Ad Hoc Report option provides the means to build your own reports on the Patient Representative contact data. For an in-depth review of how to use Ad Hoc, refer to the following manual.

DHCP National Training Program
Patient Representative, Version 1.0
June 1994
Designing Your Own Ad Hoc Reports.

The DIVISION and INTERNAL APPEAL fields have been added to this report as sort fields.

This option provides the ability to update sort and print macros. If the Ad Hoc Report menu has changed since the macro was created, a message will be displayed once the macro is loaded, informing you the macro is not current. The macro can then be reviewed and if it still reflects the desired report, it can be updated. If the macro is no longer valid, you are given the opportunity to reenter the macro.

Here are the definitions of the macro functions and the sort and print modifiers.

Macro Functions

[L Load sort (and print) macro.
Used to bring up the macro in order to print your report.

[S Save sort (and print) macro.
You cannot build a macro that sorts and prints. Sort and print macros are created separately.

[O Output macro
The output macro will print a blank Ad Hoc Macro Report or one with the fields and modifiers you have entered. This does not save the entries. There are two ways to obtain a record of both sort and print fields and modifiers. Enter **[O** at the beginning of the sort and also at the beginning of the print. Enter the **[O** only at the beginning of the print selections.

Reports Menu
Ad Hoc Report

[I Inquire sort (and print) macro
This function will let you look at the sort fields or print fields for the chosen macro.

[D Delete sort (and print) macro
This function deletes any macros you want to eliminate.

Sort Modifiers

These are the modifiers used in front of the sort fields. Each performs a specific task on that field.

PREFIXES

#	New page for each new value of the specified field.
-	Sort field values in reverse order. (numeric & date/time fields only)
+	Print subtotals for specified field totals.
!	Give sequential number to each new value within specified field.
@	Suppress sub-headers for specified field.
'	Do not sort by specified field (select a range for this field, then sort by some other field).

These are the modifiers used in back of the sort fields.

SUFFIXES

;Cn	Start the sub-header caption at column 'n'.
;Ln	Sort by the first 'n' characters of the value of the sort field.
;Sn	Skip 'n' lines every time the value of the sort field changes. You may use ;S to skip a single line (equivalent to ;S1).
;"xxx"	Use 'xxx' as the sub-header caption. You may use ;"" if no sub-header caption is desired.

Reports Menu
Ad Hoc Report

Print Modifiers

These are the modifiers used in front of the print fields.

PREFIXES

&	Print totals for this field.
!	Print count for this field.
+	Print totals, counts, and mean for this field.
#	Print totals, count, mean, maximum, minimum, and standard deviation for this field.

These are the modifiers used in back of the print fields.

SUFFIXES

;Cn	Start the output for the selected field in column 'n'.
;Dn	Rounds numeric fields to 'n' decimal places.
;Ln	Left justify data in a field of 'n' characters. If the data is more than 'n' characters in length, it will be truncated to fit.
;N	Do not print duplicated data for a field.
;Rn	Right justify data in a field of 'n' characters. If the data is more than 'n' characters in length, it will NOT be truncated to fit.
;Sn	Skip 'n' lines before printing the data for the selected field. You may use ;S to skip a single line (equivalent to ;S1).
;T	Use the field title as the header.
;Wn	Wrap the output of the selected field in a field of 'n' characters. Breaks will occur at word divisions. Use ;W for default wrapping.
;X	Omit the spaces between print fields and suppress the column header.
;Yn	Start the output for the selected field at horizontal line (row) number 'n'.
;"xxx"	Use 'xxx' as the column header.
;”"	Suppresses column header.

Reports Menu
Ad Hoc Report

Enter "[S" to save the macro at the first sort selection.

```
=========== Patient Representative Ad Hoc Report Generator ===========

     Contact Number                      20   Congressional Contact
 2   Date Of Contact                     21   Date Sent
 3   Patient Name                        22   Date Due
 4   SSN                                 23   Issue Codes
 5   Date of Birth                       24   Serv/Sect Involved (to 10/1/97)
 6   Sex                                 25   Serv/Discipline Involved
 7   Eligibility Status                  26   Disciplines
 8   Category                              Issue Text
 9   Info Taken by                       28   QM Involvement
10   Entered by                            Resolution Comments
     Name of Contact                     30   Date Resolved
     Phone of Contact                    31   Status
13   Contact Made by                     32   Code Status
14   Source of Contact (to 10/1/97)        Code Definition
15   Source(s) of Contact                34   Division
16   Location of Event                   35   Persian Gulf Service?
17   Treatment Status                    36   Period of Service
18   Employee                              Issue Code Name
19   Refer Contact to                    38   Internal Appeal


   Sort selection # 1: [Save sort macro

   The macro will be saved when you exit the sort menu.
```

Reports Menu
Ad Hoc Report

```
=========== Patient Representative Ad Hoc Report Generator ===========

     Contact Number                      20   Congressional Contact
 2   Date Of Contact                     21   Date Sent
 3   Patient Name                        22   Date Due
 4   SSN                                 23   Issue Codes
 5   Date of Birth                       24   Serv/Sect Involved (to 10/1/97)
 6   Sex                                 25   Serv/Discipline Involved
 7   Eligibility Status                  26   Disciplines
 8   Category                                 Issue Text
 9   Info Taken by                       28   QM Involvement
10   Entered by                               Resolution Comments
     Name of Contact                     30   Date Resolved
     Phone of Contact                    31   Status
13   Contact Made by                     32   Code Status
14   Source of Contact (to 10/1/97)           Code Definition
15   Source(s) of Contact                34   Division
16   Location of Event                   35   Persian Gulf Service?
17   Treatment Status                    36   Period of Service
18   Employee                                 Issue Code Name
19   Refer Contact to                    38   Internal Appeal

   Sort selection # 1: ??

Select the major data element to sort by.  Maximum of 4 sort fields allowed.
Enter numeric 1 to 39, <RETURN> to end, ^ to exit.

Macro functions:          [L  Load sort macro        [S  Save sort macro
   [O  Output macro       [I  Inquire sort macro     [D  Delete sort macro

Sort prefixes:   (e.g. enter +1 to turn on totaling for field 1)
   +  Totalled fields      -  Reverse sort order      !  Sequence/ranking number
   #  New page on sort     @  Suppress sub-header     '  Range without sorting

Sort suffixes:   (e.g. enter 1;C5 to print the field 1 sub-header at column 5)
   ;Cn  -  Start the sub-header         ;Ln    -  Use the first n characters of
           caption at column n                     a field value for sorting
   ;Sn  -  Skip n lines every time the  ;"xxx" -  Use xxx as the sub-header
           sort field value changes                caption, for no caption ;""
```

Reports Menu
Ad Hoc Report

```
=========== Patient Representative Ad Hoc Report Generator ===========

     Contact Number                      20   Congressional Contact
 2   Date Of Contact                     21   Date Sent
 3   Patient Name                        22   Date Due
 4   SSN                                 23   Issue Codes
 5   Date of Birth                       24   Serv/Sect Involved (to 10/1/97)
 6   Sex                                 25   Serv/Discipline Involved
 7   Eligibility Status                  26   Disciplines
 8   Category                                 Issue Text
 9   Info Taken by                       28   QM Involvement
10   Entered by                               Resolution Comments
     Name of Contact                     30   Date Resolved
     Phone of Contact                    31   Status
13   Contact Made by                     32   Code Status
14   Source of Contact (to 10/1/97)           Code Definition
15   Source(s) of Contact                34   Division
16   Location of Event                   35   Persian Gulf Service?
17   Treatment Status                    36   Period of Service
18   Employee                                 Issue Code Name
19   Refer Contact to                    38   Internal Appeal

   Sort selection # 1: +17,'2
```

You can enter every sort field separated by commas at the first Sort selection. Here we chose to total and sort by the TREATMENT STATUS field and use the DATE OF CONTACT field for a range.

```
   Sort by: Treatment Status

    Sort from: BEGINNING// ?

    Enter the beginning sort value or press <RETURN> to start with BEGINNING.
```

Reports Menu
Ad Hoc Report

```
  Select one of the following:

       I         Inpatient
       O         Outpatient
       D         Domiciliary
       N         NHCU
       L         Long Term Psych
       E         Extended/Intermed. Care
       H         HBHC

  Sort from: BEGINNING// <RET>


 Sort by: Date Of Contact

  Sort from: BEGINNING// <RET>


 Save sort macro name: TREAT TOT
Are you adding 'TREAT TOT' as a new AD HOC MACRO? No// Y   (YES)

 Ask user BEGINNING/ENDING values for Treatment Status? No// <RET>   (NO)

 Ask user BEGINNING/ENDING values for Date of Contact? No// Y   (YES)
```

Reports Menu
Ad Hoc Report

Building the print macro.

```
=========== Patient Representative Ad Hoc Report Generator ===========

 1   Contact Number                      20   Congressional Contact
 2   Date Of Contact                     21   Date Sent
 3   Patient Name                        22   Date Due
 4   SSN                                 23   Issue Codes
 5   Date of Birth                       24   Serv/Sect Involved (to 10/1/97)
 6   Sex                                 25   Serv/Discipline Involved
 7   Eligibility Status                  26   Disciplines
 8   Category                            27   Issue Text
 9   Info Taken by                       28   QM Involvement
10   Entered by                          29   Resolution Comments
11   Name of Contact                     30   Date Resolved
12   Phone of Contact                    31   Status
13   Contact Made by                     32   Code Status
14   Source of Contact (to 10/1/97)      33   Code Definition
15   Source(s) of Contact                34   Division
16   Location of Event                   35   Persian Gulf Service?
17   Treatment Status                    36   Period of Service
18   Employee                            37   Issue Code Name
19   Refer Contact to                    38   Internal Appeal

   Print selection # 1: [Save print macro

   The macro will be saved when you exit the print menu.
```

Reports Menu
Ad Hoc Report

```
=========== Patient Representative Ad Hoc Report Generator ===========

 1   Contact Number                      20   Congressional Contact
 2   Date Of Contact                     21   Date Sent
 3   Patient Name                        22   Date Due
 4   SSN                                 23   Issue Codes
 5   Date of Birth                       24   Serv/Sect Involved (to 10/1/97)
 6   Sex                                 25   Serv/Discipline Involved
 7   Eligibility Status                  26   Disciplines
 8   Category                            27   Issue Text
 9   Info Taken by                       28   QM Involvement
10   Entered by                          29   Resolution Comments
11   Name of Contact                     30   Date Resolved
12   Phone of Contact                    31   Status
13   Contact Made by                     32   Code Status
14   Source of Contact (to 10/1/97)      33   Code Definition
15   Source(s) of Contact                34   Division
16   Location of Event                   35   Persian Gulf Service?
17   Treatment Status                    36   Period of Service
18   Employee                            37   Issue Code Name
19   Refer Contact to                    38   Internal Appeal

   Print selection # 1: ??

Select the first data element to print.  Maximum of 7 print fields allowed.
Enter numeric 1 to 39, <RETURN> to end, ^ to exit.

Macro functions:        [L  Load print macro         [S  Save print macro
   [O  Output macro     [I  Inquire print macro      [D  Delete print macro

Print prefixes:   (e.g. enter !1 to turn on counting for field 1)
   &  Total              !  Count                     +  Total, Count & Mean
   #  Total, Count, Mean, Maximum, Minimum, and Standard Deviation

Print suffixes:   (e.g. enter 1;C5 to print the field 1 value at column 5)
   ;Cn  -  Start output at column n       ;Yn    -  Start output at line n
           Use ;C-n to start output n                Use ;Y-n to start output n
           columns from the right margin             lines from the bottom margin
   ;Ln  -  Left justify data in an        ;Rn    -  Right justify data in an
           output field of n characters              output field of n characters
           Will truncate the output                  Will not truncate the output
   ;Wn  -  Wrap output in a field of n    ;X     -  Omit spaces between print
           characters, breaks at word                fields and suppress the
           divisions, default wrap ;W                column header
   ;Sn  -  Skip n lines before printing   ;Dn    -  Output numeric value with n
           Use ;S to skip one line                   decimal places (rounds off)
   ;N   -  Do not print duplicated data   ;T     -  Use field Title as header
   ;""  -  Suppress column header         ;"xxx" -  Use xxx as column header
```

Reports Menu
Ad Hoc Report

```
=========== Patient Representative Ad Hoc Report Generator ===========

 1   Contact Number                      20   Congressional Contact
 2   Date Of Contact                     21   Date Sent
 3   Patient Name                        22   Date Due
 4   SSN                                 23   Issue Codes
 5   Date of Birth                       24   Serv/Sect Involved (to 10/1/97)
 6   Sex                                 25   Serv/Discipline Involved
 7   Eligibility Status                  26   Disciplines
 8   Category                            27   Issue Text
 9   Info Taken by                       28   QM Involvement
10   Entered by                          29   Resolution Comments
11   Name of Contact                     30   Date Resolved
12   Phone of Contact                    31   Status
13   Contact Made by                     32   Code Status
14   Source of Contact (to 10/1/97)      33   Code Definition
15   Source(s) of Contact                34   Division
16   Location of Event                   35   Persian Gulf Service?
17   Treatment Status                    36   Period of Service
18   Employee                            37   Issue Code Name
19   Refer Contact to                    38   Internal Appeal

   Print selection # 1: !17;C50   Treatment Status

   Print selection # 2: <RET>

   Save print macro name: TREAT TOT
  Are you adding 'TREAT TOT' as a new AD HOC MACRO? No// Y   (YES)

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

DEVICE: A100         RIGHT MARGIN: 80// <RET>
```

Reports Menu
Ad Hoc Report

```
TREATMENTS STATUS TOTALS                        MAY 21,2002  10:55    PAGE 1
                                                   Treatment
                                                   Status
-----------------------------------------------------------------------------

        TREATMENT STATUS: Domiciliary
SUBCOUNT                                           9
        TREATMENT STATUS: Extended/Intermed. Care
SUBCOUNT                                           3
        TREATMENT STATUS: HBHC
SUBCOUNT                                           4
        TREATMENT STATUS: Inpatient
SUBCOUNT                                           26
        TREATMENT STATUS: Long Term Psych
SUBCOUNT                                           45
        TREATMENT STATUS: NHCU
SUBCOUNT                                           4
        TREATMENT STATUS: Outpatient
SUBCOUNT                                           43
COUNT                                              134
```

Reports Menu
Contacts with No Patient Identified

This option prints a list of contact records (by date range) that do not have a patient name associated with the contact. Information provided on the report includes date range, contact number and date of contact.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Daily List of Patient Contacts

This report prints a listing of all contacts for a selected date range. Information provided may include contact number, patient name and SSN, issue code, customer service standard, and service/section or discipline. Each date in the range will be printed on a separate page.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
List of Open Cases

This report provides the date of contact, patient name, SSN, and contact number for all open cases for a selected date range.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Patient Name with Brief Data

This option provides a brief summary of a selected patient's contacts for a selected date range. Information provided may include patient name and SSN, contact number, issue text, issue codes, service or discipline, and division.

Reports Menu
Report by Employee

This option prints a report by employee name that contains the contact record number, date of the contact, patient name, issue text, and service/discipline for a selected date range. The report for each selected employee will print on a separate page.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Report of Contact

The Report of Contact option is used to generate a report of contact. It can be printed to the screen, sent to a printer, or sent to a specific person(s) via E-MAIL by entering *P-MESS* at the *DEVICE* prompt.

You have the option to include/not include the resolution text for the selected report of contact.

Reports Menu
Statistical Reports Menu
Discipline Contact Totals

This option prints the total contacts for each discipline for a date-of-contact date range. It includes the contact date, patient name and SSN, contact number, and issue text. A subcount of each selected discipline is provided along with the total count of all disciplines.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Discipline Issue Totals

This report provides totals of all issues for one or all discipline(s) over a selected date range. If the report is printed for all disciplines, each discipline will print on a separate page.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Service/Discipline Contact Totals

This report totals contacts by service/discipline for a date of contact date range. Information provided on the report includes contact date, patient name and SSN, contact number, and issue text. A subcount of contacts for each selected service/discipline is provided along with the total count of all service/disciplines.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Service/Discipline Issue Totals

This report provides totals of all issues for one or all service/discipline(s) over a selected date range. If the report is printed for all service/disciplines, each service/discipline will print on a separate page.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Spreadsheet Report

The Spreadsheet Report option prints the data using a comma as a delimiter. Data can then be captured for loading into a word processor, saving the file as TEXT, and loading into a spreadsheet. There are no headers or footers on this report.

Note that some counts are by issue (#I) and some counts are by contacts (#C).

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Customer Service Standards Report

This report lists the number of Report of Contacts logged with each Customer Service Standard for a selected date range. You may choose a detailed or summary report.

For detailed reports, you may choose to print the report for one discipline or one service/discipline. If you choose to print by discipline, the discipline must be entered in uppercase as a valid two letter abbreviation. If you choose service/discipline, the entry must be from the SERVICE/DISCIPLINE file (#745.55).

The disciplines are a set group of values that are exported with the Patient Representative software. The service/disciplines are entries from the SERVICE/DISCIPLINE file and must be linked to one of the established disciplines. New entries may be made to this file through the Add New Service/Discipline option in the Set-up and Maintenance Menu.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Employee Contact Totals

This report totals employee contacts by employee and service/discipline for a date of contact date range. Information provided on the report includes contact date and patient name. A subcount of contacts for each selected employee is provided along with the total count for all employees.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Issue Totals for All, Male, or Female

This option prints the total number of issues for a date range. You may choose to print issues for all records or only those for male or female patients. All issue codes will be displayed on the report, even those with a zero total. The report will include both the old and new issue codes.

It should be noted that a report for "All" issues includes issue counts for records with no patient.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Location Issue Totals

This option prints the total number of issues for a date range sorted by hospital location. Each location will print on a separate page.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Reports Menu
Statistical Reports Menu
Old Service/Section Contact Totals

This option prints the total contacts for each selected service/section. Information includes the contact date, patient name, SSN, contact number, and issue text. A subcount of contacts for each selected service/section is provided along with the total count for all services/sections.

The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997. The old field was not deleted for historical purposes.

The date of contact date range and service/section selected the last time this option was utilized will be displayed before each appropriate prompt.

Reports Menu
Statistical Reports Menu
Old Service/Section Issue Totals

This option provides totals of all issues for each service over a selected date range. When actually printed, each service is printed on a separate page.

The SERVICE/SECTION field was replaced by the SERVICE/DISCIPLINE field in October 1997. The old field was not deleted for historical purposes.

Set-up and Maintenance Menu
Add New Service/Discipline

This option allows the user to add new entries into the SERVICE/DISCIPLINE file (#745.55) or to edit existing entries.

Disciplines are a set group of values that are exported with the Patient Representative software. The SERVICE/DISCIPLINE file allows entry of new values entered through this option. They must be linked to one of the established disciplines.

Set-up and Maintenance Menu
Archive Report

The Archive Report option prints archived Patient Representative contact records for a selected date range. Information provided includes the contact date, contact number, patient name, SSN, issue codes, issue text, and resolution comments.

No records are purged using this option.

You may select a single division or all divisions. If all is selected the report is sorted by division.

Set-up and Maintenance Menu
Congressional Contact Enter/Edit

This option is used to enter or edit congressional offices/names into the CONGRESSIONAL OFFICE file (#745.4).

The CONGRESSIONAL CONTACT field appears when you enter a new or edit an old contact **and** when "CO" is entered in the CONTACT MADE BY field. This option allows you to build a list of choices for the CONGRESSIONAL CONTACT field. If you want to delete an item from that list of choices, inactivate it by entering YES at the *INACTIVE* prompt here.

If you are not interested in tracking congressional contacts for your records, it is not necessary to utilize this option.

Set-up and Maintenance Menu
Issue Code Enter/Edit

This functionality is no longer available.

Set-up and Maintenance Menu
Patient Representative Keys

There are two keys that can be assigned to users in the Patient Representative package.

Patient Rep Info Taker Key
Users who hold this key comprise the list of choices at the *Information Taken By* prompt seen throughout this package. Generally, this includes the Patient Representative and/or any others whom your site chooses to take down information concerning a patient complaint. These individuals should be assigned this key.

Patient Rep Record Control
This key **must** be given to any user who requires the ability to see and/or edit any contact record.

Set-up and Maintenance Menu
Purge Contact Records

This option purges all contact records with dates of contact that fall within the selected date range. **These records cannot be retrieved once they are purged.**

Before running this option, you may wish to print a copy of the basic information in the records you want to purge by using the Archive Report option.

Set-up and Maintenance Menu
Site Parameters Edit

This option is used to edit the site parameters associated with the Patient Representative package.

Display Issue Codes: YES//
This parameter determines whether or not the previously entered issue codes and services for a record should be displayed prior to the *Issue Codes* prompt. It is suggested that you answer YES to this parameter.

Automatic ROC Alert: NO//

1 or YES
You may entirely automate the sending of ROCs via the Alert System. With this method, any entry in the REFER CONTACT TO field will receive an alert containing information on the ROC. The recipients of these alerts can print a copy of the ROC, delete it, ignore it, or respond to it. Any response by the recipient of the alert is automatically dated and laid into the RESOLUTION COMMENTS field with the recipient's name. If this is the way you want to send ROCs, then set this parameter to 1 or YES. Any method using the Alert System sends a separate alert to each individual recipient.

0 or NO
If your site resolves many issues via the phone or if you often send ROCs to specific people just for their information and you do not want their names in the REFER CONTACT TO field, you may wish to leave this parameter set to 0 or NO. In this situation, you can use the Send or Kill an Alert option whenever you want to obtain a response that is automatically laid into the RESOLUTION COMMENTS field or whenever you just want to inform a person of a ROC.

If you want even more control, use the Report of Contact option using the device P-MESS. This sends the ROC via MailMan, and you can converse with the recipient until you feel the problem is resolved. This method does not automatically lay the recipient's comments into the RESOLUTION COMMENTS field.

See the Orientation section in this manual for an in-depth look at how Alerts work for the recipient of the ROC.

Manual Rollup

The Manual Rollup option is used to manually run the Patient Representative database rollup. It performs the same task as the Patient Representative background job option except for a one-month time frame.

You may choose to transmit the whole month or a date range within the month.

Glossary

Ad Hoc	A reporting mechanism that allows the user to determine, from a predefined list of fields, what fields the program should sort by and what data to print.
Alert	In the Patient Representative package, the alert contains the information in the Report of Contact.
Category	Category of Beneficiary as defined by the Patient Treatment File. Classification system for types of benefits.
Consumer Contact Number	A number designating a specific contact. The number consists of *site#*, *year*, and *case#*. Example: 500.980017 500 = Albany CIOFO 98 = 1998 0017 = Case number
Contact	The person or organization that is getting in touch with the Patient Representative.
Eligibility	Classification system for entitlement.
Issue Code	Brief reason for the contact with the Patient Representative.
Macro	A series of commands that can be called up by one simple command. Used in the Ad Hoc Report option.
Patient Representative	An advocate or agent for the patient.
Patient (Contact) Representative Key	This key defines the look-up list for the INFORMATION TAKEN BY field.

Patient Rep Record Control Key	The authority allocated or given to Patient Representatives to be able to look at or edit any Patient Contact Record.
Report of Contact (ROC)	A printout of information concerning an issue.
Resolution Text	A word processing area in which information is entered on how an issue was managed.
Source of Contact	How contact with the Patient Representative was made.
Treatment Status	Where patient was at time of issue; inpatient, outpatient, etc.

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