

Setting Up Your Site Taxonomies*

What is a Taxonomy?

Taxonomies are groupings of functionally related data elements, such as specific codes or code ranges, which are used by various RPMS applications to find data items in PCC to determine if an item was done for the patient.

For data elements like diagnoses and procedures, the taxonomy simply identifies the codes that a program should look for. Examples of taxonomies used by GPRA+ are:

- Community: names of all the communities in your service area
- Surveillance Diabetes: all Diabetes ICD9 codes

For other types of data elements, including medications and lab tests, taxonomies are used to mitigate the variations in terminology that exist in RPMS tables from one facility to another.

For example, one site's RPMS Lab Table might contain the term "Glucose Test" while another site's table may contain, for the same test, the term "Glucose." PCC programs have no way to deal with such variations in spelling, spacing, and punctuation. Rather than attempting to find all potential spellings of a particular lab test, the application would look for a specific taxonomy *name* that has been standardized at every facility. The *contents* of the taxonomy are determined by the facility. In this example, the applications would use the "DM Audit Glucose Tests Taxonomy." The individual facility will enter all varieties of spelling and punctuation for Glucose Tests used at that particular facility.

Codes and terms contained in a taxonomy are referred to as "members."

What Taxonomies Need to Be Set Up for GPRA+?

In many cases, the taxonomies used by GPRA+ will already exist on your site's system because it is used by another RPMS application. Others will need to be created.

The GPRA+ Implementation Team will need to review the individual taxonomies on the GPRA+ Taxonomies chart below and make sure that all appropriate entries exist. Detailed instructions on how to set up and check these taxonomies are included following the chart.

* Extracted from the *GPRA+ (IHS GPRA Reporting System) User Manual v. 1.0, April 2002*



GPRA+ Taxonomies

Taxonomies with a indicated in the right column either should exist already in RPMS or are included with the GPRA+ software and not need to be updated.

Taxonomy Name	Description	Members	Used with Indicators ...	<input checked="" type="checkbox"/>
COMMUNITY TAXONOMY (name of this taxonomy is determined by the site – see specific instructions below)	Contains all of the communities that are considered in your service area . All patients who live in these communities will be reviewed for inclusion in the report.	Communities of residence in the service area.	ALL	<input type="checkbox"/>
BGP CPT FLU	Contains all CPT codes indicating an Influenza vaccine was given. This taxonomy is distributed with the GPRA+ software and should not need to be modified.	90657 – 90660	24	<input checked="" type="checkbox"/>
BGP CPT MAMMOGRAM	Contains all CPT codes indicating a Mammogram was done. This taxonomy is distributed with the GPRA+ software and should not need to be modified.	76090 – 76092	7	<input checked="" type="checkbox"/>
BGP CPT PAP	Contains all CPT codes indicating a Pap Smear was done. This taxonomy is distributed with the GPRA+ software and should not need to be modified.	88141 - 88150 88152 - 88158 88164 - 88167	6, 6A	<input checked="" type="checkbox"/>
BGP DEPRESSIVE DISORDERS	Contains all Depressive Disorder ICD9 codes . This taxonomy is distributed with the GPRA+ software and should not need to be updated.	296.00 – 313.1	A	<input checked="" type="checkbox"/>
BGP PRIMARY CARE CLINICS	Contains all primary care clinic codes as defined by IHS . This taxonomy is distributed with the GPRA+ software and should not need to be modified.	01, 06, 13, 20, 24, 28	2C, 3C, 4C, 5C	<input checked="" type="checkbox"/>
BGP PRIMARY PROVIDER DISC	Contains all primary provider discipline codes . This taxonomy is distributed with the GPRA+ software and should not need to be modified.	00, 11, 16, 17, 18, 21, 25, 33, 41, 44, 45, 49, 64, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, A1	2C, 3C, 4C, 5C	<input checked="" type="checkbox"/>
SURVEILLANCE DIABETES	Contains all Diabetes ICD9 Diagnoses codes . This taxonomy will already be present on the RPMS system. This taxonomy does not need to be updated.	ICD Dx Codes 250.00-250.93	1, 1B, 2A, 2B, 2C, 3A, 3B, 3C, 4A, 4B, 4C, 5A, 5B, 5C, A, D	<input checked="" type="checkbox"/>



BGP DENTAL SEALANT OP SITES	Contains all Dental Operative Sites that refer to the following teeth: 2, 3, 4, 15, 18, 19, 30, 31	You should work with the dental staff to set up this taxonomy. It can be set up using QMAN following the instructions presented below.	13	
BGP GPRA EX EDUC TOPICS	Contains all education topics that pertain to diet and exercise education. This taxonomy should be reviewed by the site so that all locally developed topics can be added.	Suggested topics: OBS-EX, OBS-LA, OBS-N, OBS-DIET, TO-EX, WL-EX, WL-LA, WL-N, WL-DIET	C	
BGP GPRA FOB TESTS	Contains all Fecal Occult Blood Lab Tests	Occult Blood Fecal Occult Blood	B	
DM AUDIT GLUCOSE TESTS TAX	Contains all Glucose Lab Tests.	Glucose, Fasting Glucose, 4Hr, 2Hr, GTT, Finger Stick, Whole Blood Glucose, Blood Sugar, Capillary Glucose, Accucheck, Lifescan	2A, 2B, 2C	
DM AUDIT HDL TAX	Contains all HDL Lab Tests.	HDL	4A, 4B, 4C	
DM AUDIT HGB A1C TAX	Contains all HGB A1C lab tests.	Hgb A1c, A1c, Hemoglobin A1c, Glycosolated Hgb	2A, 2B, 2C	
DM AUDIT LDL CHOLESTEROL TAX	Contains all LDL Cholesterol Lab Tests.	LDL	4A, 4B, 4C	
DM AUDIT LIPID PROFILE TAX	Contains all Lipid Profile Lab Tests.	Lipid Profile	4A, 4B, 4C	
DM AUDIT MICROALBUMINURIA TAX	Contains all Microalbuminuria Lab Tests.	Microalbuminuria Micral Microalbuminuria, Urine A/C Ratio, AC Ratio, ACR, Microalbumin/Creatinine Ratio, Microalbumin Random	5A, 5B, 5C	
DM AUDIT TRIGLYCERIDE TAX	Contains all Triglyceride Lab Tests.	Triglyceride	4A, 4B, 4C	
DM AUDIT URINE PROTEIN TAX	Contains all Urine Protein Lab Tests.	Urine Protein Urine Protein Screen	5A, 5B, 5C	



How to Set Up Taxonomies

Taxonomies can be set up with either QMAN or with the Taxonomy Setup menu.

Setting Up the New Community Taxonomy Using QMAN

The community taxonomy is the only NEW taxonomy you will have to set up, which can be easily done using QMAN. Below is a sample of creating this taxonomy. If you don't have access to QMAN, see your RPMS site manager.

Choose the QMAN menu option, then follow the instructions below:

```
What is the subject of your search? LIVING PATIENTS // LIVING PATIENTS
  Subject of search: PATIENTS
    ALIVE TODAY [SER = .06]
Attribute of LIVING PATIENTS: COMMUNITY (ENTER THE WORD COMMUNITY FOLLOWED BY THE ENTER KEY)
Enter COMMUNITY: TUCSON PIMA ARIZONA 077 0410077
Enter ANOTHER COMMUNITY: SELLS PIMA ARIZONA 067 0410067
Enter ANOTHER COMMUNITY: SAN XAVIER PIMA ARIZONA 065 0410065
Enter ANOTHER COMMUNITY:
```

(Enter all communities of interest and when done, press the enter key the ENTER ANOTHER COMMUNITY prompt)

The following have been selected =>
SAN XAVIER
SELLS
TUCSON

Want to save this COMMUNITY group for future use? No// **Y** (Yes)

Group name: CMI GPR+ REPORT COMMUNITIES (**enter a name for the taxonomy**)

Are you adding 'CMI GPR+ REPORT COMMUNITIES' as
a new TAXONOMY (the 718TH)? No// **Y** (Yes)
TAXONOMY BRIEF DESCRIPTION:

EXTENDED DESCRIPTION:

No existing text
Edit? NO//

Computing Search Efficiency
Rating.....

```
Subject of search: PATIENTS
  ALIVE TODAY [SER = .06]
  CURRENT COMMUNITY (SAN XAVIER/SELLS...) [SER = 3.55]
```

***** Q-MAN OUTPUT OPTIONS *****

- Select one of the following:
- 1 DISPLAY results on the screen
 - 2 PRINT results on paper
 - 3 COUNT 'hits'



```
4          STORE results of a search in a FM search template
5          SAVE search logic for future use
6          R-MAN special report generator
9          HELP
0          EXIT
```

(at this prompt choose 0 to exit.)

Reviewing And Setting Up Taxonomies Using GPRA+

```
*****
** Indian Health Service GPRA Data Reporting System **
*****
Version 1.0 April, 2002

CROW HO

LGP      Run GPRA Report for Local Use
FTA      Run GPRA Report for Local Use and AREA Export
UPL      Upload GPRA Data File from Site
ARP      Run AREA GPRA Report (to be used at Area only)
TXCH     Check for Taxonomies Required by the GRPA Report
TAX      Taxonomy Setup

Select IHS GPRA Performance Indicator Menu Option:
```

Review Taxonomies [TXCH]

1. Select **TXCH Check for Taxonomies Required by the GPRA Report**. This option scans for missing Taxonomies or those which have no entries.

You should see a list of those Taxonomies that are new to the GPRA+ Report that have no members. You will run this option again when Taxonomy setup has been completed to ensure that all Taxonomies required for the GPRA report have entries.

NOTE: Many of the taxonomies used by the GPRA Report have already been established and populated by other RPMS applications (e.g., Diabetes Audit). **These taxonomies should be reviewed for completeness.**

2. Review the list of taxonomies that need to be set up. Any taxonomy whose name begins with DM AUDIT is a part of the DM Audit system and will be referred to in the set up options as a Diabetes Management Taxonomy.

If your taxonomies have all been set up, the message “All taxonomies are present” will appear on the screen.

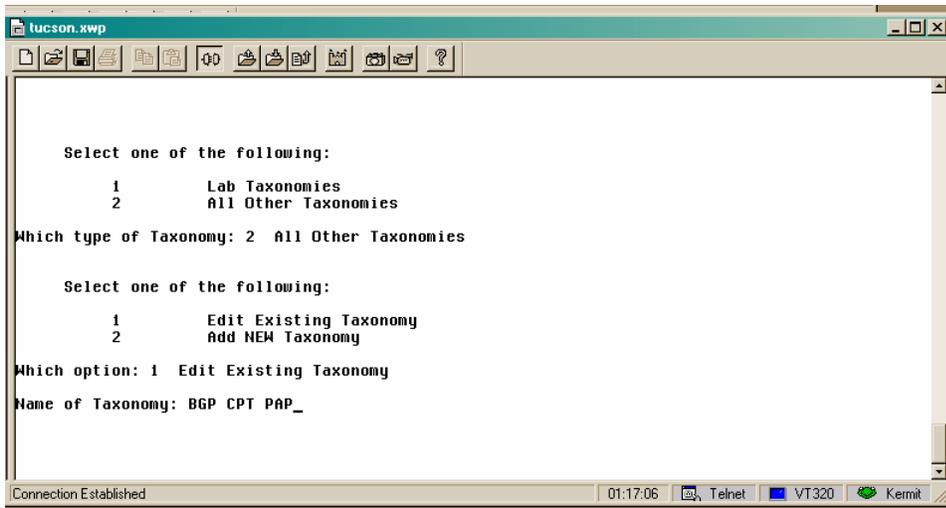
Edit Taxonomies [TAX]

TAX Taxonomy Setup is a menu option that allows you to review and/or add members to the Taxonomies of lab tests, diagnoses, health factors, education topics, etc. that are to be used in the GPRA+ report. All taxonomies used by GPRA+ should be present after the software is loaded,



even if the taxonomy has no members yet. It is recommended that ALL previously defined taxonomies be reviewed, as well as setting up the new GPRA+ taxonomies.

1. Select **TAX Taxonomy Setup** from the GPRA Report Menu. Two options appear.
 - 1 **Diabetes Mgt System Taxonomies** (These taxonomies all begin with the name DM AUDIT)
 - 2 **Other Taxonomies** (This is a generic tool for modifying and maintaining Taxonomies. For convenience, all Taxonomies used in the Diabetes Management System are included in the first option.)
2. Select **2 Other Taxonomies**.
3. Select **1 Edit Existing**
4. Enter the name of the Taxonomy.

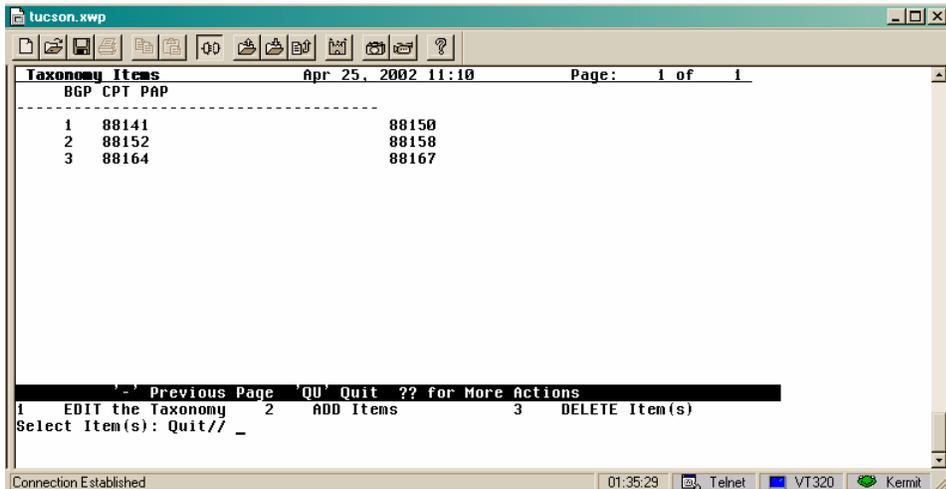


5. Select either **2 ADD Items** or **3 DELETE Items**. Depending on the taxonomy type, you will enter CPT, ICD9 or other types of codes.

Use the GPRA+ Taxonomies Chart as a reference to add or edit members.

NOTE: Option **1 EDIT the Taxonomy** is primarily a programmer's tool for viewing the setup of the Taxonomy. The display indicates who created the Taxonomy, which file is drawn from to create the Taxonomy, as well as linkages to Q-Man and other file cross-references. Users are only allowed to edit the Brief Description and Extended Description.

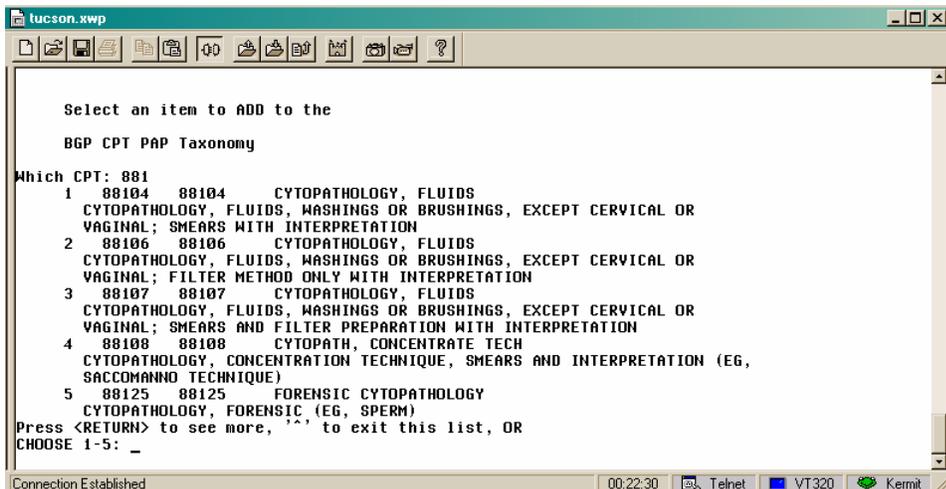




- At the Which [Code Type] prompt, begin typing the code or short name. Entering a partial code will display a list that matches the criteria, e.g., typing “881” will display CPT codes 88104 through 88199.

Use “?” at any prompt to see a full list to select from.

Choose the specific code and press <ENTER>.



- The Which [Code Type] prompt will be displayed again. Enter another code or press <ENTER> to return to the Taxonomy menu.
- When all items are displayed correctly, press <ENTER> to exit and save that Taxonomy.



Diabetes Mgt System Taxonomies

For the GPRA+ Report, the following taxonomies should be checked using the Diabetes Mgt System taxonomies option. Use the GPRA+ Taxonomies table to review the members.

- DM AUDIT URINE PROTEIN TAX;;Urine Protein Lab Taxonomy**
- DM AUDIT MICROALBUMINURIA TAX;;Microalbuminuria Lab Taxonomy**
- DM AUDIT HGB A1C TAX;;HGB A1C Lab Taxonomy**
- DM AUDIT GLUCOSE TESTS TAX;;Glucose Tests Taxonomy**
- DM AUDIT LIPID PROFILE TAX;;Lipid Profile Lab Taxonomy**
- DM AUDIT CHOLESTEROL TAX;;Cholesterol Lab Taxonomy**
- DM AUDIT LDL CHOLESTEROL TAX;;LDL Cholesterol Lab Taxonomy**
- DM AUDIT HDL TAX;;HDL Lab Taxonomy**
- DM AUDIT TRIGLYCERIDE TAX;;Triglyceride Lab Taxonomy**
- SURVEILLANCE DIABETES;;Diabetes diagnoses**

To Review/ Edit a Taxonomy in the Diabetes Mgt System Taxonomies Menu

1. Type TAX at the “Select IHS GPRA Performance Indicator Menu Option.” prompt. Two options appear.
 - 1.Diabetes Mgt System Taxonomies (These taxonomies all begin with the name DM AUDIT. All taxonomies used in the Diabetes Management System are included in this option)
 - 2.Other Taxonomies (This is a generic tool for modifying and maintaining all other taxonomies.)
2. Type 1 Diabetes Mgt System Taxonomies. A menu of seven (7) categories is displayed.
3. Type the number of the taxonomy category you want to review/edit at the “Which One.” prompt.

Select one of the following
Diabetes Mgt System Taxonomy Categories to review.

Select one of the following:

1	Diagnosis
2	Medication
3	Patient Education Topic
4	Health Factors
5	Problem List Diagnosis
6	Provider
7	Lab

Which one: 1 <RETURN>

4. Type 1 at the “Select ACTION:” prompt to select an existing taxonomy.
5. Type the number of the taxonomy you want to review or modify at the “Which Taxonomy:” prompt. After you have selected the desired taxonomy, that taxonomy and its members are displayed.



```
Select Taxonomy to Edit          Mar 31, 2000 09:07:29          Page: 1 of 1

  No.  Taxonomy
  ---  -
  1    DM AUDIT PROBLEM DIABETES DX
  2    DM AUDIT PROBLEM HTN DIAGNOSES
  3    DM AUDIT PROBLEM SMOKING DXS
  4    DM AUDIT SMOKING RELATED DXS
  5    DM AUDIT TYPE I DXS
  6    DM AUDIT TYPE II DXS
  7    SURVEILLANCE DIABETES
  8    SURVEILLANCE HYPERTENSION
  9    SURVEILLANCE TUBERCULOSIS

'-' Previous Page  'QU' Quit  ?? for More Actions
1  SELECT a Taxonomy  2  ADD a Taxonomy

Select ACTION: Quit// 1 <ENTER>

Which Taxonomy:  (1-9): 1 <ENTER>
```

6. Compare the contents of the ICD Dx Codes displayed in the window against the GPRA+ Taxonomies chart above. Since the diagnosis taxonomies are imported when the patch is installed, it is unlikely that you will need to add or delete members to these taxonomies.

```
Taxonomy Items          Mar 31, 2000 09:25:09          Page: 1 of 1

DM AUDIT PROBLEM DIABETES DX
-----
  1    250.00                      250.93

'-' Previous Page  'QU' Quit  ?? for More Actions
1  EDIT the Taxonomy  2  ADD Items  3  DELETE Item(s)

Select Item(s): Quit//
```

NOTE: The list of codes next to a single number indicates that this represents a range of codes, i.e. 250.00-250.93. Code ranges currently can only be entered into a taxonomy using QMan.

7. Type 2 to add items to the taxonomy items, or 3 to delete items from the taxonomy items.

NOTE: The Edit the Taxonomy option is primarily a programmer’s tool for viewing the setup of the taxonomy. The display indicates who created the taxonomy, which file is drawn from to create the taxonomy, as well as linkages to QMan and other file cross-references. You are only allowed to edit the brief description and extended description.

8. When all the items are displayed as you want them, press the Return key at the “Select Item(s):” prompt to exit and save that taxonomy.



Review/Edit a Lab Test Taxonomy

Lab test taxonomies can be slightly more complex than the others. It is recommended that you ask for assistance from a medical technologist who is familiar with the lab test database at your facility.

This section will guide you through adding tests to the DM GLUCOSE TESTS taxonomy.

```

Lab Taxonomies          Jun 10, 2002 13:41:17          Page: 1 of 1
LAB Taxonomies

  No.  Taxonomy
  ---  -
  1    DM AUDIT ALT TAX
  2    DM AUDIT AST TAX
  3    DM AUDIT CHOLESTEROL TAX
  4    DM AUDIT CREATININE TAX
  5    DM AUDIT GLUCOSE TESTS TAX
  6    DM AUDIT HDL TAX
  7    DM AUDIT HGB A1C TAX
  8    DM AUDIT LDL CHOLESTEROL TAX
  9    DM AUDIT MICROALBUMINURIA TAX
 10    DM AUDIT TRIGLYCERIDE TAX
 11    DM AUDIT URINALYSIS TAX
 12    DM AUDIT URINE PROTEIN TAX

'-' Previous Page  'QU' Quit  ?? for More Actions
1  Select Lab Taxonomy  2  ADD Lab Taxonomy
Select ACTION: Quit// 1  Select Lab Taxonomy

Edit which Lab Taxonomy: (1-12): 5
    
```

1. From the LAB Taxonomies menu, type 1 Select Lab Taxonomy option.
2. Type 5 DM AUDIT GLUCOSE TESTS TAX to select the option from the list of Lab taxonomy options. In the example shown in Figure 3-10 , there are no lab tests included in the DM AUDIT GLUCOSE TESTS taxonomy.

```

Lab Taxonomy          Mar 31, 2000 11:20:16          Page: 1 of 1
  DM AUDIT GLUCOSE TESTS TAX
  No. Lab              Site/Specimen
  ---  -
  -----'-' Previous Page  'QU' Quit  ?? for More
1  MODIFY Taxonomy Info  3  ADD Lab Test
2  EDIT Lab Test        4  DELETE Lab Test
Select ACTION: Quit// 3  ADD Lab Test
    
```

3. Type 3 ADD Lab Test.



4. Type **glucose** at the “Which Lab Test:” prompt. Several types of lab tests specific to your site will appear.
5. Type the number of the test you want to add.
6. At the “Select Site/Specimen:” prompt, press the Return key to bypass the prompt.

Note: Depending on testing methodologies for various lab tests, the same test may be performed on more than one specimen type. Working with a medical technologist familiar with the lab test database will assist you in determining whether a value needs to be entered at the “Select Site/Specimen:” prompt.

```
Select lab tests to add.

Which LAB TEST: glucose
  1  GLUCOSE
  2  GLUCOSE  FASTING GLUCOSE
  3  GLUCOSE  GLUCOSE,FLUID
  4  GLUCOSE  2HR PP GLUCOSE
  5  GLUCOSE, FINGER STICK  GLUCOSE,BLOOD
Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-5:
  6  GLUCOSE,CSF
  7  GLUCOSE,PEDIATRIC GTT  PEDIATRIC GTT
CHOOSE 1-7: 1  GLUCOSE
Select SITE/SPECIMEN:

Lab tests currently in this taxonomy:
GLUCOSE,BLOOD
GLUCOSE

Select lab tests to add.
CHOOSE 1-5: 2  FASTING GLUCOSE
Select SITE/SPECIMEN:
```

7. When all the desired tests have been added to the taxonomy, press the Return key when prompted for another lab test. You will be returned to the display screen. At this point, you may continue adding lab tests to the taxonomy, delete tests that are not required, or quit if the taxonomy is satisfactory.



```
Lab Taxonomy      Jun 10, 2002 15:00:23      Page:    1 of    1
DM AUDIT GLUCOSE TESTS TAX
No. Lab              Site/Specimen
-----
1  GLUCOSE,BLOOD
2  GLUCOSE
3  FASTING GLUCOSE

-----'-' Previous Page  'QU' Quit  ?? for More Actions-----
---
1  MODIFY Taxonomy Info 3      ADD Lab Test
2  EDIT Lab Test        4      DELETE Lab Test
Select ACTION: Quit//
```

8. Once you are finished adding and/or removing ALL taxonomies and taxonomy items, select TXCH menu option to perform the final check for taxonomies needed for the GPRA+ report.

