



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Visual CRS

(BGP)

User Manual

Version 9.0
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Office of Information Technology (OIT)
Division of Information Resource Management
Albuquerque, New Mexico

Preface

This user manual provides instructions for using Visual CRS 2009 - Version 9.0 (patch 1).

The contents of the user manual are organized to match the Visual CRS interface, with chapters and pages corresponding to the Visual CRS 2009 menu folders and options.

Notes: To avoid redundancy, this user manual does not include background information on such topics as security keys, report content, or a summary of changes in this version of the application. For this information, refer to the **CRS Version 9.0 User Manual**.

For sample output and information on the logic used for each performance measure, refer to the **CRS Version 9.0 Clinical Performance Measure Logic Manual**.

For information on installing the Visual CRS 2009 GUI on your RPMS server and client PC, refer to the **CRS Version 9.0 Installation Guide**.

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1.0 Introduction

Visual CRS 2009 is a graphical user interface (GUI) version of the Clinical Reporting System (CRS), Version 9.0 Patch 1 for FY 2009 Clinical Performance Measures. The GUI interface contains the same functionality as the character-based user interface (CHUI) or "roll and scroll" version of CRS Version 9.0 Patch 1, including setting up site parameters and taxonomies, running reports and patient lists at the facility level, and running reports at the Area Office level.

2.0 The Visual CRS Main Window

The Visual CRS window contains the following items:

- [Menu pane](#)
- [Report Status button](#)
- [Change Division button](#)
- [Change Version button](#)
- [Exit button](#)
- [Help button](#)
- [About button](#)

Menu pane

The report and setup options are contained within the folders in the **Menu** pane. When you start Visual CRS, the folder tree is collapsed.

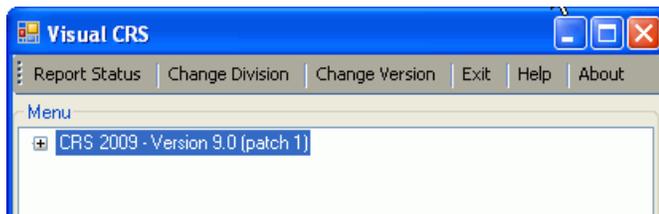


Figure 2-1: Visual CRS main window

- To expand a folder, click  to the left of the folder name.
- To collapse a folder, click  to the left of the folder name.
- To run a report or setup option, click the name of the option within the folder.

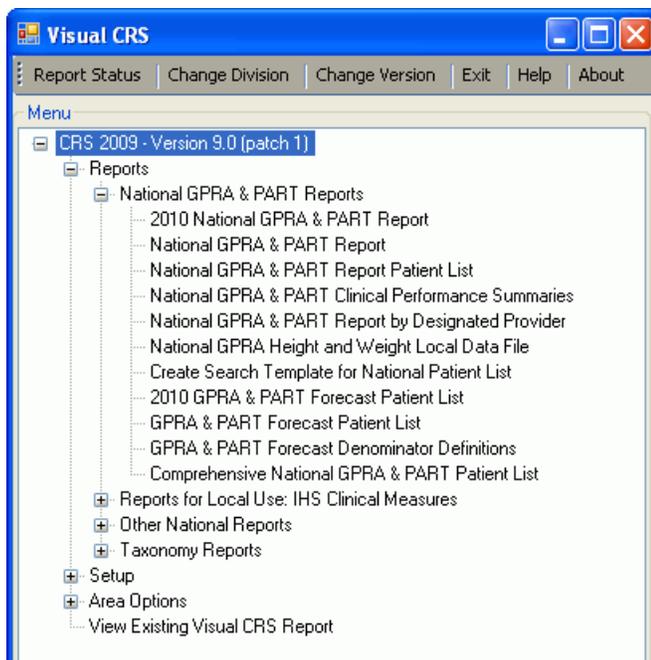


Figure 2-2: Visual CRS main window with folders expanded

Report Status button

The **Report Status Check** window lists the reports run by CRS and stored on the computer. Reports listed in this window can be viewed or deleted.

Name	User	Start Time	End Time	Type of Report	Report Status
<input type="checkbox"/> 030904	PARKS, CAROLINE	Sep 04, 2009@16:12		CRS 09 NATIONAL GPRA...	RUNNING
<input type="checkbox"/> PList:090817	PARKS, CAROLINE	Aug 17, 2009@11:42	Aug 17, 2009@14:14:01	CRS 09 PATIENT FOREC...	COMPLETED
<input checked="" type="checkbox"/> CP090817	PARKS, CAROLINE	Aug 17, 2009@09:20	Aug 17, 2009@09:20:01	CRS 09 PATIENT FOREC...	COMPLETED
<input type="checkbox"/> cp090817a	PARKS, CAROLINE	Aug 17, 2009@09:19	Aug 17, 2009@09:19:18	CRS 09 PATIENT FOREC...	COMPLETED
<input type="checkbox"/> 0308071	PARKS, CAROLINE	Aug 07, 2009@14:59	Aug 07, 2009@14:59:34	CRS 09 NATIONAL GPRA...	COMPLETED
<input type="checkbox"/> 030807	PARKS, CAROLINE	Aug 07, 2009@14:58	Aug 07, 2009@15:02:34	CRS 09 NATIONAL GPRA...	COMPLETED
<input type="checkbox"/> 201Dngpt_090807	PARKS, CAROLINE	Aug 07, 2009@14:34	Aug 07, 2009@15:02:34	CRS 09 NATIONAL GPRA...	COMPLETED

Figure 2-3: Report Status window

Reports that are queued to be run at a later time or are being run when the **Report Status Check** window is opened show the word “RUNNING” in the **Report Status** column. Reports that have already been run show the word “COMPLETED” in this column.

- To display the **Report Status Check** window, click the **Report Status** button.
- To view a report, click anywhere in the row for that report except the check box.
- To delete one or more reports, select the check box or boxes next to the reports, and then click **Delete Checked Reports** at the top of the window.
- To refresh the list of reports, click **Refresh** at the top of the window.

Change Division button

If your site has a multi-divisional database, you can run reports for other sites in the database by changing the site you are logged in to.

To change the site you are logged in to, follow these steps:

1. Click **Change Division** at the top of the **Visual CRS** window to display the **Change Division** window.
2. Select the correct site from the **Division** list, and then click **OK** to close the **Change Division** window.

CRS reports will use data from the site you selected from the list. You must use **Change Division** again to log in to a different site.

Change Version button

You can run reports using older versions of Visual CRS. Each numbered version of Visual CRS includes performance measure logic that corresponds to a specific GPRA report year. For example, the current version of Visual CRS (CRS 2009 - Version 9.0 Patch 1), runs reports using the 2009 performance measure logic.

To run reports using a different version of Visual CRS, follow these steps:

1. Click **Change Version** at the top of the Visual CRS window to display the **Select CRS Product** window.
2. Select a version from the **CRS Version** list to close the **Select CRS Product** window.

CRS reports will be based on the GPRA report year logic corresponding to the Visual CRS version you selected. You must use **Change Version** again to run reports based on logic for a different GPRA year.

Exit button

To close Visual CRS, do one of the following:

- Click **Exit** at the top of the **Visual CRS** window.
- Click  in the top right-hand corner of the window.

Help button

To open the Visual CRS Online Help, do one of the following:

- Click **Help** at the top of the **Visual CRS** window.
- Click  in any report definition window to open the online Help.

About button

To display information about this version of Visual CRS, including the exact version number, click **About** at the top of the **Visual CRS** window to display the **About Visual CRS 9.0 patch 1** dialog box.

To close the dialog box, click **OK**.

3.0 Running Reports

3.1 National GPRA & PART Reports

3.1.1 2010 National GPRA & PART Report

Use this option to produce a National GPRA & PART Report for the 2010 GPRA year using the performance measure definitions from CRS Version 9.0. The following parameters are predefined for this report:

- A report period of July 1, 2009 through June 30, 2010
- A baseline year of July 1, 1999 through June 30, 2000
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

Run the 2010 National GPRA & PART Report

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **2010 National GPRA & PART Report** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click  in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message "All taxonomies are present." is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **2010 National GPRA & PART Report** window.

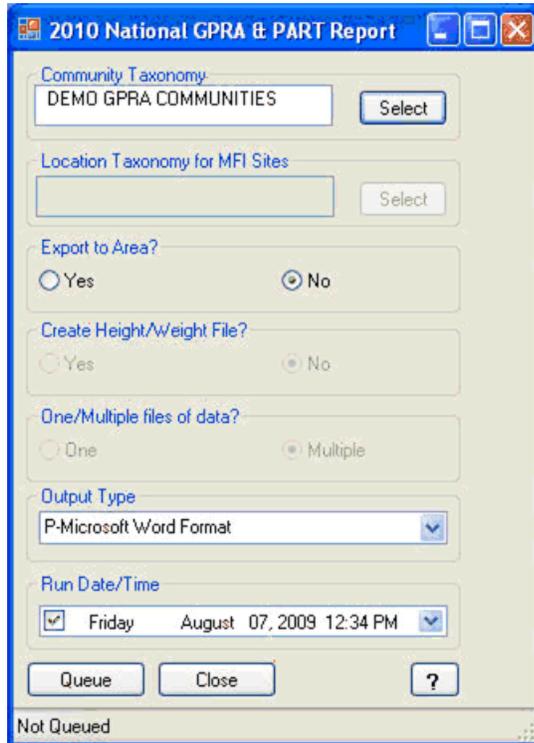


Figure 3-1: 2010 National GPRA & PART Report window

3. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 4. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
4. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

5. Under **Export to Area?**, do one of the following:
 - To send quarterly data to your Area Office, click **Yes**.
 - If you are not ready to send quarterly data to your Area Office, click **No**.

Note: The ability to create a local height and weight data file has been moved to the National GPRA & PART Height and Weight Local Data File option. The **Create Height/Weight File?** and **One/Multiple files of data?** options in this window are inactive.

6. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
7. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.2 National GPRA & PART Report

Use this option to produce a National GPRA & PART Report for the 2009 GPRA year using the performance measure definitions from CRS Version 9.0. The following parameters are predefined for this report:

- A report period of July 1, 2008 through June 30, 2009
- A baseline year of July 1, 1999 through June 30, 2000
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

For more information:
See **Section 5.2** in the **CRS Version 9.0 User Manual** for additional information on the 2009 National GPRA and PART Report.

Run the National GPRA & PART Report

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **National GPRA & PART Report** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **National GPRA & PART Report** window.

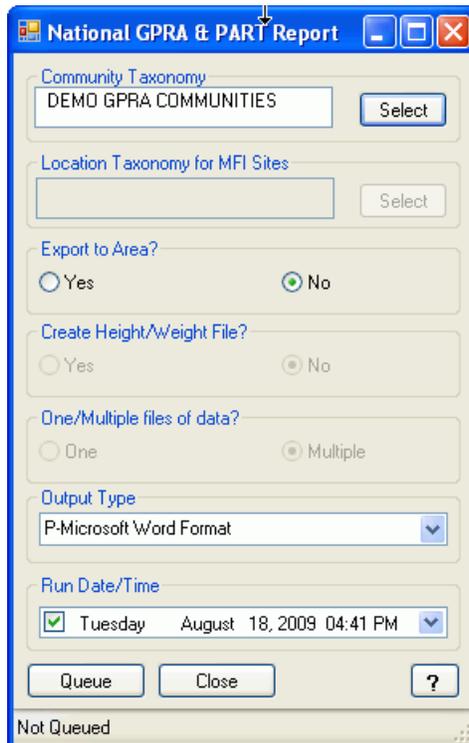


Figure 3-2: National GPRA & PART Report window

3. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 4. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)

- To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
4. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

5. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.

Note: The ability to create a local height and weight data file has been moved to the National GPRA & PART Height and Weight Local Data File option. The **Create Height/Weight File?** and **One/Multiple files of data?** options in this window are inactive.

6. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
7. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.3 National GPRA & PART Report Patient List

Use this option to produce patient lists for performance measures included in the National GPRA & PART Report and the GPRA & PART Performance Report.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **National GPRA & PART Report Patient List** menu option will not be displayed for users without this security key.

For more information, see **Section 5.3** in the **CRS Version 9.0 User Manual** for additional information on the National GPRA and PART Patient List.

Run the National GPRA & PART Report Patient List

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **National GPRA & PART Report Patient List** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **National GPRA & PART Report Patient List** window.



Figure 3-3: National GPRA & PART Report Patient List window

3. To select performance measures and patient lists, click **Select Measure(s)** at the top of the window and follow the instructions in [Selecting Measures and Patient Lists](#).
4. In the **Select By** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).

 - **A - All Patients**
 - **A - All Patients**
5. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

6. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
7. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 8. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
8. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).
9. To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).
10. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
11. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.4 National GPRA & PART Clinical Performance Summaries

Use this option to produce clinical performance summaries for the National GPRA & PART Report. The following parameters are predefined for this report:

- A report period of July 1, 2008 through June 30, 2009
- A baseline year of July 1, 1999 through June 30, 2000
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

For more information, see **Section 5.4** in the **CRS Version 9.0 User Manual** for additional information on the National GPRA and PART Clinical Performance Summaries Report.

Run the National GPRA & PART Clinical Performance Summaries

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **National GPRA & PART Clinical Performance Summaries** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **National GPRA & PART Clinical Performance Summaries** window.

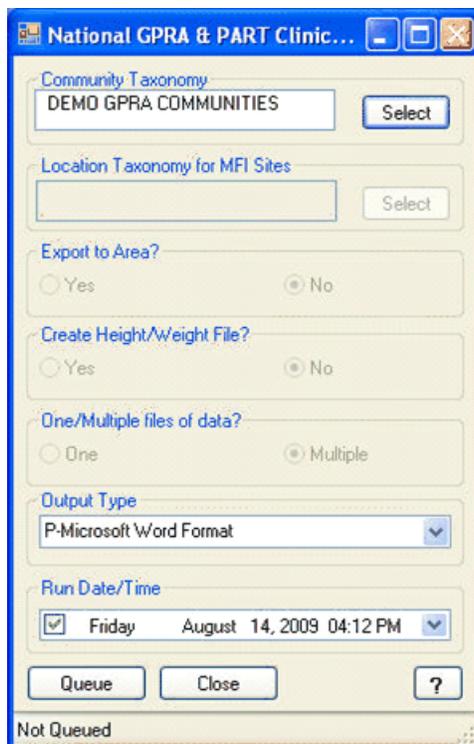


Figure 3-4: National GPRA & PART Clinical Performance Summaries window

3. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 4. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
4. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

Note: Because the ability to export data to the Area Office is not available in this report, the Export to Area? option in this window is inactive. Use the National GPRA & PART Report option to export data.

The ability to create a local height and weight data file has been moved to the **National GPRA & PART Height and Weight Local Data File** option. The **Create Height/Weight File?** and **One/Multiple files of data?** options in this window are inactive.

5. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).

6. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.5 National GPRA & PART Report by Designated Provider

Use this option to produce a National GPRA & PART Report for a selected designated provider. The following parameters are predefined for this report:

- A report period of July 1, 2008 through June 30, 2009
- A baseline year of July 1, 1999 through June 30, 2000
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

For more information, see **Section 5.5** in the **CRS Version 9.0 User Manual** for additional information on the National GPRA and PART Report by Designated Provider.

Run the National GPRA & PART Report by Designated Provider

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **National GPRA & PART Report by Designated Provider** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **National GPRA & PART Report by Designated Provider** window.



Figure 3-5: National GPRA & PART Report by Designated Provider window

3. To select the designated provider to report on, click **Select** next to the **Designated Provider** box and follow the instructions in [Selecting a Provider](#).

4. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
5. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).
6. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
7. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.6 National GPRA Height and Weight Local Data File

Use this option to produce a file for your local facility's use listing all active clinical patients 0 to 65 years of age who are included in the National GPRA & PART Report. The file contains visit data including height and/or weight measurements taken during the period from July 1, 2008 through June 30, 2009. The following parameters are predefined for this file:

- A report period of July 1, 2008 through June 30, 2009
- A baseline year of July 1, 1999 through June 30, 2000
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

For more information: see **Section 5.6** in the **CRS Version 9.0 User Manual** for additional information on the National GPRA and PART Height and Weight Local Data File.

Create the National GPRA Height and Weight Local Data File

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **National GPRA Height and Weight Local Data File** option to display the **Taxonomy Check** window containing information about the file, including the potential size of the file, and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **National GPRA Local Height Weight Report** window.

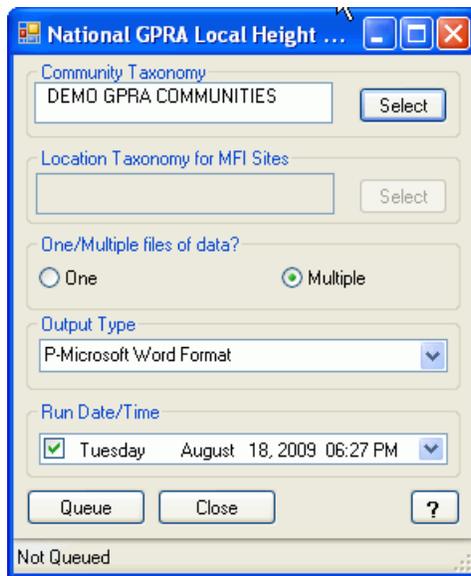


Figure 3-6: National GPRA Local Height Weight Report window

3. Under Community Taxonomy, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 4. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).

4. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

5. Under **One/Multiple files of data?**, do one of the following:

- To create a single data file, select **One**.

If you plan to use Microsoft Excel to review this data, use the **One** option *only* if you are certain that your file will contain fewer than 65,536 records (including the file header). Records in excess of 65,536 will not be visible in Excel.

An automated file name beginning with "CRSHW" will be assigned to the file.

- To create multiple files, select **Multiple**. Each file will contain a maximum of 65,536 records including the file header.

The last ten characters of each automated file name will specify the number of the file and the total number of files created (e.g., 01_of_10).

If you select this option and the number of records, including the file header, is less than or equal to 65,536, all records will be written to a single file.

6. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
7. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.7 Create Search Template for National Patient List

Use this option to produce a search template of patients who either met or did not meet a National GPRA & PART Report performance measure.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **Create Search Template for National Patient List** menu option will not be displayed for users without this security key.

For more information, see **Section 5.7** in the **CRS Version 9.0 User Manual** for additional information on creating a search template for a national GPRA & PART patient list.

Create a search template for a National GPRA & PART Report patient list

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **Create Search Template for National Patient List** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message "All taxonomies are present." is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Create Search Template for National Patient List** window.

The screenshot shows a dialog box titled "Create Search Template for National Patient List". It contains the following fields and options:

- Select Measure(s):** R-Random Patient List
- Provider:** [Empty text box] [Select]
- Date Range:** [Empty text box]
- Report Year:** 2009
- Base Line Year:** 2000
- Community Taxonomy:** DEMO GPRA COMMUNITIES [Select]
- Patient Type:** 1-Indian/Alaska Native (Classification 01)
- Location Taxonomy for MFI Sites:** [Empty text box] [Select]
- Output Type:** P-Microsoft Word Format
- Run Date/Time:** Monday August 03, 2009 02:04 PM

Buttons at the bottom: Queue, Close, ?

Status bar: Not Queued

Figure 3-7: Create Search Template for National Patient List window

3. To select a performance measure and patient lists, click **Select Measure(s)** at the top of the window and follow the instructions in [Selecting Measures and Patient Lists](#).

After selecting performance measures and patient lists, the **Search Templates** window is displayed.

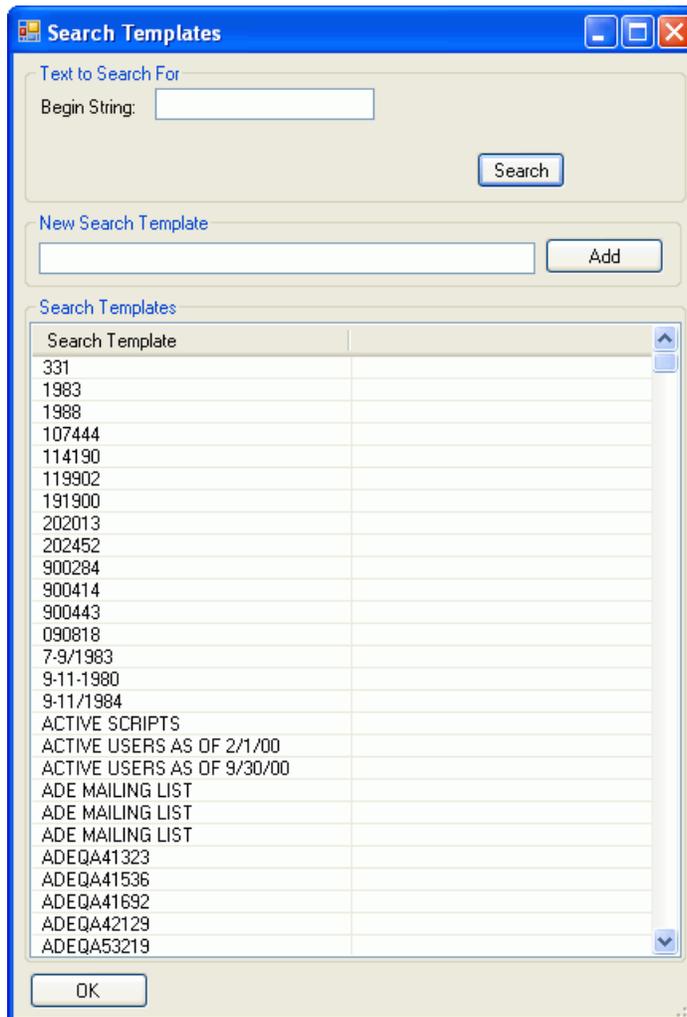


Figure 3-8: Search Templates window

4. In the **Search Templates** window, do one of the following:
 - To create a new search template, type the name of the template in the **New Search Template** box and click **Add**.
 - To overwrite an existing template, click the name of the template in the **Search Templates** list to highlight it.

- To locate an existing template in the **Search Templates** list, type the first letter or letters of the template name in the **Begin String** box and click **Search**.
Click **OK** to display the **Overwrite?** message box. Click **Yes** to continue and close the **Search Templates** window, or click **No** to leave the existing template as it is and return to the **Search Templates** window.
5. After the **Search Templates** window is closed, the name of the search template to be created or overwritten is displayed at the bottom of the **Create Search Template for National Patient List** window.
 6. In the **Select By** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**
To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**
 7. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
 8. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 9. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
 9. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)

10. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

11. To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).

12. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

13. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.8 2010 GPRA & PART Forecast Patient List

Use this option to produce a GPRA & PART Forecast Patient List for the 2010 GPRA year using the performance measure definitions from CRS Version 9.0.

The GPRA & PART Forecast Patient List is linked to the Scheduling package and produces a list of patients, with or without scheduled appointments, identifying GPRA and PART measures that each patient has not yet met. The revised CRS logic used for the GPRA and PART measures is defined in the report, and information for the provider on how to fulfill the GPRA and PART measures is included as well.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **2010 GPRA & PART Forecast Patient List** menu option will not be displayed for users without this security key.

For more information, see **Section 5.8** in the **CRS Version 9.0 User Manual** for additional information on the GPRA & PART Forecast Patient List. The information in the CRS Version 9.0 User Manual describes the GPRA & PART Forecast Patient List for GPRA year 2009. However, the overall content applies to this report as well.

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **2010 GPRA & PART Forecast Patient List** option to display the **Taxonomy Check** window containing information about the report. Click OK to display the **2010 GPRA & PART Forecast Patient List** window.

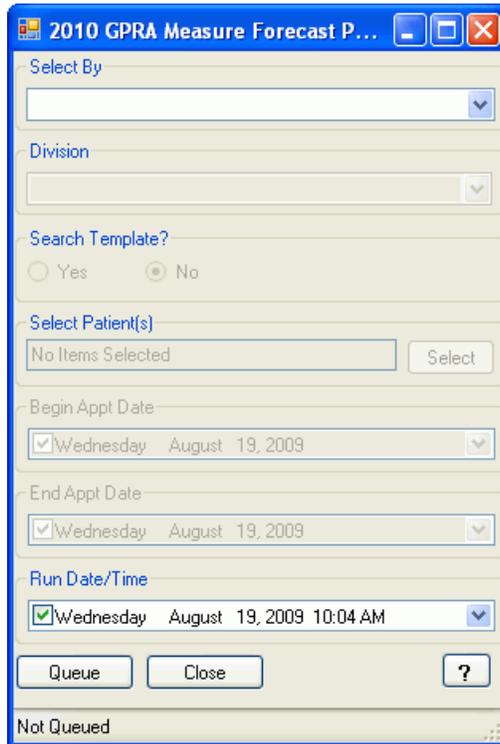


Figure 3-9: 2010 GPRA & PART Forecast Patient List window

3. In the **Select By** list, select the criteria you want to use for the forecast patient list. Click the criteria in the list below for more instructions.
 - [C - By CLINIC NAME for a specified appointment date range](#)
 - [P - Selected Patients w/Appointments](#)
 - [D - One Facility's or Division's Appointments](#)
 - [A - Any selected set of patients regardless of appointment status](#)
4. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.8.1 2010 GPRA & PART Forecast Patient List by Clinic Name

To run the GPRA & PART Forecast Patient List for selected clinics with appointments during a specified date range, follow these steps.

Figure 3-10: 2010 GPRA & PART Forecast Patient List window (By CLINIC NAME option)

1. In the **Select By** list, select **C-By CLINIC NAME for a specified appointment date range**.
2. If one or more clinics have been selected for a report, the words “Items Selected” are displayed in the **Select Clinic** box. If no clinics have been selected, the box reads “No Items Selected.”

To select one or more clinics, click **Select** next to the **Select Clinic** box, then follow the instructions in [Selecting Clinics](#).

3. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:
 - Select the month, date, or year that appears in the box. Type the month, date, or year of the date you want the report period to begin or end, or use the UP and DOWN ARROW keys for each component to select the correct date. Repeat for each component that you want to change.
 - Click the arrow to display the calendar. Navigate to the month and year you want the report period to begin or end, and then click the correct date in that month.
4. To run the report right away, skip to Step 5.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
- b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
5. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

6. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.8.2 2010 GPRA & PART Forecast Patient List by Any Selected Set of Patients Regardless of Appointment Status

To run the GPRA & PART Forecast Patient List for patients in a search template, or for a manually selected set of patients, with or without appointments, follow these steps.

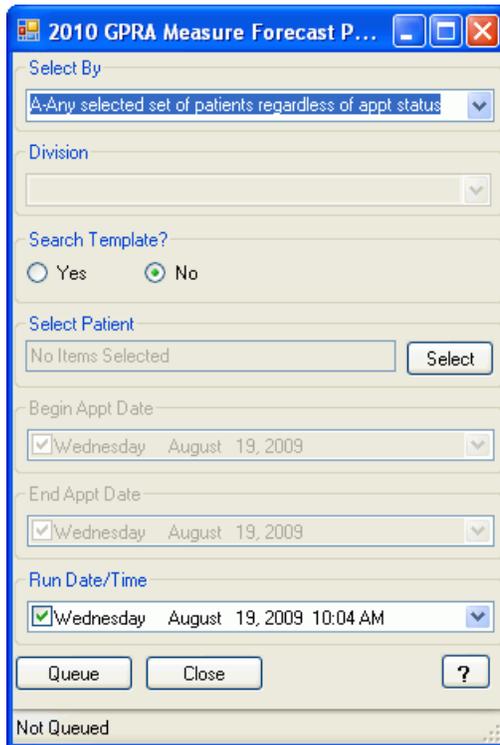


Figure 3-11: 2010 GPRA & PART Forecast Patient List window (Any selected set of patients option)

1. In the **Select By** list, select **A-Any selected set of patients regardless of appt status**.
2. If a search template or one or more patients have been selected for a report, the words “Patients Selected” are displayed in the **Select Patient(s)** or **Select Search Template** box. If no template or patients have been selected, the box reads “No Items Selected.”

To select patients to report on, do one of the following:

- To select patients manually, click **No** under **Search Template?**.

Click **Select** next to the **Select Patient(s)** box to display the **Multiple Patient Select** window, and then follow the instructions in [Selecting Multiple Patients](#).

- To report on patients included in a search template, click **Yes** under **Search Template?**. The **Select Patient(s)** label changes to **Select Search Template**. Click **Select** next to the **Select Search Template** box to display the **Search Template** window, and then follow the instructions in [Selecting a Search Template](#).
3. To run the report right away, skip to Step 4.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
4. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

5. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.8.3 2010 GPRA & PART Forecast Patient List by One Facility's or Division's Appointments

This option limits the clinics included in the patient list to those in a specific facility, or to those in a specific division where a facility uses a multi-divisional database. In contrast, the option for a forecast patient list by clinic can report on clinics in all facilities or divisions in the database.

To run the GPRA & PART Forecast Patient List for appointments at a facility or division during a specified date range, follow these steps.

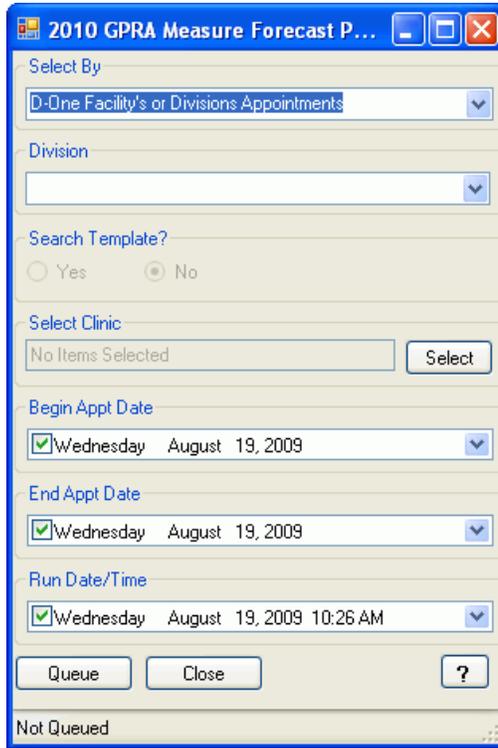


Figure 3-12: 2010 GPRA & PART Forecast Patient List window (One Facility's or Divisions Appointments option)

1. In the **Select By** list, select **D-One Facility's or Divisions Appointments**.
2. In the **Division** list, select the division that you would like to report on.

If your database is not multi-divisional, only the name of your facility will be displayed.

3. If one or more clinics have been selected for a report, the words “Items Selected” are displayed in the **Select Clinic** box. If no clinics have been selected, the box reads “No Items Selected.”

To select one or more clinics, click **Select** next to the **Select Clinic** box, then follow the instructions in [Selecting Clinics](#).

4. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:
 - Select the month, date, or year that appears in the box. Type the month, date, or year of the date you want the report period to begin or end, or use the UP and DOWN ARROW keys for each component to select the correct date. Repeat for each component that you want to change.
 - Click the arrow to display the calendar. Navigate to the month and year you want the report period to begin or end, and then click the correct date in that month.
5. To run the report right away, skip to Step 6.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
- b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
6. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

7. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.8.4 2010 GPRA & PART Forecast Patient List by Selected Patients w/Appointments

To run the GPRA & PART Forecast Patient List for a single selected patient with appointments in a specified date range, follow these steps.

The screenshot shows a software window titled "2010 GPRA Measure Forecast P...". It contains several sections:

- Select By:** A dropdown menu with "P-Selected Patients w/Appointments" selected.
- Division:** An empty dropdown menu.
- Search Template?:** Radio buttons for "Yes" and "No", with "No" selected.
- Select Patient:** A text box containing "No Items Selected" and a "Select" button.
- Begin Appt Date:** A dropdown menu with "Wednesday August 19, 2009" selected.
- End Appt Date:** A dropdown menu with "Wednesday August 19, 2009" selected.
- Run Date/Time:** A dropdown menu with "Wednesday August 19, 2009 10:26 AM" selected.
- Buttons:** "Queue", "Close", and "?" buttons at the bottom.
- Status:** "Not Queued" at the bottom left.

Figure 3-13: 2010 GPRA & PART Forecast Patient List window (Selected Patients w/Appointments option)

1. In the **Select By** list, select **P-Selected Patients w/Appointments**.
2. If a patient has been selected for a report, the patient's name is displayed in the **Select Patient** box. If no patient has been selected, the box reads "No Items Selected."

To select a patient, click **Select** next to the **Select Patient** box to display the **Select Patient** window.

3. To locate a specific patient in the **Select Patient** window, follow these steps:
 - a. Type all or part of the patient's name (last name, then first name), social security number, HRCN, or date of birth in the format MM/DD/YYYY, in the **Type Patient Name** box.
 - b. Select the number of matches to display in the **Matches** list

- c. Click **Display**. A list of names matching the criteria you entered is displayed in the **Patient List** pane.

Patient Name	SSN	Chart #	DOB
MANARD,JARROD DRAKE DAVID	388531797	199759	Oct 05, 1995
MANARD,JORDAN LEE	568539205	141670	May 06, 1971
MANDA,ALVINA YVONNE	620154635	107271	Dec 23, 1960
MANDA,CALEB WILLIAM	238541759	118233	Dec 26, 1983
MANDA,CHANDLER KEITH	481534132	102225	Dec 14, 1946
MANDA,GREGORY SCOTT		171841	Dec 19, 1994
MANDEVILL,JAMES HAROLD	690630563	137004	Nov 01, 1971
MANDRELL,RAYMOND	318199859	191003	Dec 10, 1997
MANDRELL,STACIE EILEEN	664070763	192958	Feb 19, 1982
MANER,BAILEY ALLAN	269198039	140180	Sep 14, 1971
MANER,BRYAN I	152638712	184191	Aug 24, 1991

Figure 3-14: Select Patient window

4. To clear the list of names and locate a different patient, do one of the following:
 - Type another patient's information in the **Type Patient Name** box.
 - Click **Clear** and then type another patient's information in the **Type Patient Name** box.
5. To select a patient to report on, click the patient's name to close the **Select Patient** window. The patient's name is displayed in the **Select Patient** box in the report definition window.
6. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:
 - Select the month, date, or year that appears in the box. Type the month, date, or year of the date you want the report period to begin or end, or use the UP and DOWN ARROW keys for each component to select the correct date. Repeat for each component that you want to change.
 - Click the arrow to display the calendar. Navigate to the month and year you want the report period to begin or end, and then click the correct date in that month.

7. To run the report right away, skip to Step 8.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
8. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.9 GPRA & PART Forecast Patient List

The GPRA & PART Forecast Patient List is linked to the Scheduling package and produces a list of patients, with or without scheduled appointments, identifying GPRA and PART measures that each patient has not yet met. The revised CRS logic used for the GPRA and PART measures is defined in the report, and information for the provider on how to fulfill the GPRA and PART measures is included as well.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **GPRA & PART Forecast Patient List** menu option will not be displayed for users without this security key.

For more information, see **Section 5.8** in the **CRS Version 9.0 User Manual** for additional information on the GPRA & PART Forecast Patient List.

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **GPRA & PART Forecast Patient List** option to display the **Taxonomy Check** window containing information about the report. Click OK to display the **GPRA & PART Forecast Patient List** window.

Figure 3-15: GPRA & PART Forecast Patient List window

3. In the **Select By** list, select the criteria you want to use for the forecast patient list. Click the criteria in the list below for more instructions.
 - [C - By CLINIC NAME for a specified appointment date range](#)
 - [P - Selected Patients w/Appointments](#)
 - [D - One Facility's or Division's Appointments](#)
 - [A - Any selected set of patients regardless of appointment status](#)
4. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.9.1 GPRA & PART Forecast Patient List by Clinic Name

To run the GPRA & PART Forecast Patient List for selected clinics with appointments during a specified date range, follow these steps.

Figure 3-16: GPRA & PART Forecast Patient List window (By CLINIC NAME option)

1. In the **Select By** list, select **C-By CLINIC NAME for a specified appointment date range**.
2. If one or more clinics have been selected for a report, the words "Items Selected" are displayed in the **Select Clinic** box. If no clinics have been selected, the box reads "No Items Selected".

To select one or more clinics, click **Select** next to the **Select Clinic** box, then follow the instructions in [Selecting Clinics](#).

3. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:
 - Select the month, date, or year that appears in the box. Type the month, date, or year of the date you want the report period to begin or end, or use the UP and DOWN ARROW keys for each component to select the correct date. Repeat for each component that you want to change.
 - Click the arrow to display the calendar. Navigate to the month and year you want the report period to begin or end, and then click the correct date in that month.
4. To run the report right away, skip to Step 5.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
- b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
5. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

6. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.9.2 GPRA & PART Forecast Patient List by Any Selected Set of Patients Regardless of Appointment Status

To run the GPRA & PART Forecast Patient List for a selected set of patients whether they have appointments or not, follow these steps.

Figure 3-17: GPRA & PART Forecast Patient List window (Any selected set of patients option)

1. In the **Select By** list, select **A-Any selected set of patients regardless of appt status**.
2. If a search template or one or more patients have been selected for a report, the words "Patients Selected" are displayed in the **Select Patient(s)** or **Select Search Template** box. If no template or patients have been selected, the box reads "No Items Selected".

To select patients to report on, do one of the following:

- To select patients manually, click **No** under **Search Template?**.

Click **Select** next to the **Select Patient(s)** box to display the **Multiple Patient Select** window, and then follow the instructions in [Selecting Multiple Patients](#).

- To report on patients included in a search template, click **Yes** under **Search Template?**. The **Select Patient(s)** label changes to **Select Search Template**. Click **Select** next to the **Select Search Template** box to display the **Search Template** window, and then follow the instructions in [Selecting a Search Template](#).
3. To run the report right away, skip to Step 4.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
4. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

5. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.9.3 GPRA & PART Forecast Patient List by One Facility's or Division's Appointments

To run the GPRA & PART Forecast Patient List for appointments at a facility or division during a specified date range, follow these steps.

Figure 3-18: GPRA & PART Forecast Patient List window (One Facility's or Divisions Appointments option)

1. In the **Select By** list, select **D-One Facility's or Divisions Appointments**.
2. In the **Division** list, select the division that you would like to report on.
3. If one or more clinics have been selected for a report, the words “Items Selected” are displayed in the **Select Clinic** box. If no clinics have been selected, the box reads “No Items Selected.”

To select one or more clinics, click **Select** next to the **Select Clinic** box, then follow the instructions in [Selecting Clinics](#).

4. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:
 - Select the month, date, or year that appears in the box. Type the month, date, or year of the date you want the report period to begin or end, or use the UP and DOWN ARROW keys for each component to select the correct date. Repeat for each component that you want to change.

- Click the arrow to display the calendar. Navigate to the month and year you want the report period to begin or end, and then click the correct date in that month.
5. To run the report right away, skip to Step 6.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
6. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

7. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.9.4 GPRA & PART Forecast Patient List by Selected Patients w/Appointments

To run the GPRA & PART Forecast Patient List for a single selected patient with appointments in a specified date range, follow these steps.

Figure 3-19: GPRA & PART Forecast Patient List window (Selected Patients w/Appointments option)

1. In the **Select By** list, select **P-Selected Patients w/Appointments**.
2. If a patient has been selected for a report, the patient's name is displayed in the **Select Patient** box. If no patient has been selected, the box reads “No Items Selected.”

To select a patient, click **Select** next to the **Select Patient** box to display the **Select Patient** window.

3. To locate a specific patient in the **Select Patient** window, follow these steps:
 - a. Type all or part of the patient's name (last name, then first name), social security number, HRCN, or date of birth in the format MM/DD/YYYY, in the **Type Patient Name** box.
 - b. Select the number of matches to display in the **Matches** list

- c. Click **Display**. A list of names matching the criteria you entered is displayed in the **Patient List** pane.

Patient Name	SSN	Chart #	DOB
MANARD,JARROD DRAKE DAVID	388531797	199759	Oct 05, 1995
MANARD,JORDAN LEE	568539205	141670	May 06, 1971
MANDA,ALVINA YVONNE	620154635	107271	Dec 23, 1960
MANDA,CALEB WILLIAM	238541759	118233	Dec 26, 1983
MANDA,CHANDLER KEITH	481534132	102225	Dec 14, 1946
MANDA,GREGORY SCOTT		171841	Dec 19, 1994
MANDEVILL,JAMES HAROLD	690630563	137004	Nov 01, 1971
MANDRELL,RAYMOND	318199859	191003	Dec 10, 1997
MANDRELL,STACIE EILEEN	664070763	192958	Feb 19, 1982
MANER,BAILEY ALLAN	269198039	140180	Sep 14, 1971
MANER,BRYNN I	152638712	184191	Aug 24, 1991

Figure 3-20: Select Patient window

4. To select a patient to report on, click the patient's name to close the **Select Patient** window. The patient's name is displayed in the **Select Patient** box in the report definition window.

To clear the list of names and locate a different patient, do one of the following:

- Type another patient's information in the **Type Patient Name** box.
 - Click **Clear** and then type another patient's information in the **Type Patient Name** box.
5. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:
- Select the month, date, or year that appears in the box. Type the month, date, or year of the date you want the report period to begin or end, or use the UP and DOWN ARROW keys for each component to select the correct date. Repeat for each component that you want to change.
 - Click the arrow to display the calendar. Navigate to the month and year you want the report period to begin or end, and then click the correct date in that month.

6. To run the report right away, skip to Step 7.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
7. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.10 GPRA & PART Forecast Denominator Definitions

Use this option to create a Microsoft Word file containing a list of the denominator definitions used in the GPRA & PART Forecast Patient List.

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **GPRA & PART Forecast Denominator Definitions** option to display the **GPRA Forecast Denominator Definition** window.



Figure 3-21: GPRA Forecast Denominator Definition window

3. To run the report immediately, skip to Step 4.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
- b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
4. Click **Queue** to display the **Enter Report File Name** window.
5. Type a file name for the report in the **Report File Name** box, and then click **OK**.
6. Click **OK** in the **Check Status** message box.
7. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.11 Comprehensive National GPRA & PART Patient List

Use this option to generate a patient list that displays all of the patients included in the National GPRA & PART Report and all of the performance measures reported to Congress and the OMB that each patient did not meet. This report also includes the name and discipline of the provider last seen by the patient.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **Comprehensive National GPRA & PART Forecast Patient List** menu option will not be displayed for users without this security key.

For more information, See **Section 5.10** in the **CRS Version 9.0 User Manual** for additional information on the Comprehensive National GPRA and PART Patient List.

Run the Comprehensive National GPRA & PART Patient List

1. In the **Reports** folder, expand the **National GPRA & PART Reports** folder to display the list of available GPRA & PART reports.
2. Click the **Comprehensive National GPRA & PART Patient List** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Comprehensive National GPRA Patient List** window.



Figure 3-22: Comprehensive National GPRA Patient List window

3. In the **List Type** list, select one of the following:
 - **R - Random Patient List**

- **P - Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**
4. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
 5. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
 6. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 7. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
 7. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).
 8. To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).
 9. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
 10. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.2 Reports for Local Use: IHS Clinical Measures

3.2.1 Selected Measures with Community Specified Report

Use this option to generate a report for local use covering selected performance measures for the communities in a specified community taxonomy.

For more information, see **Section 5.11.2.1** in the **CRS Version 9.0 User Manual** for additional information on the Selected Measures with Community Specified Report.

Run the Selected Measures with Community Specified Report

1. In the **Reports** folder, expand the **Reports for Local Use: IHS Clinical Measures** folder to display the list of available local reports.
2. Click the **Selected Measures w/Community Specified** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Selected Measures w/Community** window.

Figure 3-23: Selected Measures w/Community window

3. In the **Type of Measure** list, do one of the following:
 - Select one of the predefined sets of performance measures.
 - Select **Selected Measures (User Defined)**, and then click **Select** to display the **Measures** window.
To select measures to report on, follow the instructions in [Selecting Performance Measures](#).
4. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

5. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
6. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

7. Under **Do you want Patient Lists?**, do one of the following:
 - Click **Yes** to generate patient lists with this report, and then click **Select Measures** to display the **Patient List Measures** window.
To select patient list measures, follow the instructions in [Selecting Patient Lists](#).
 - Click **No** to run the report without generating patient lists.

<p>Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under Do you want Patient Lists? will be inactive for users without this security key.</p>
--

8. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**
To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**
9. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)

10. To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).
11. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
12. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.2.2 Selected Measures with Patient Panel Population Report

Use this option to generate a report for local use covering selected performance measures for the patients in a specified search template.

For more information, see **Section 5.11.2.2** in the **CRS Version 9.0 User Manual** for additional information on the Selected Measures with Patient Panel Population Report.

Run the Selected Measures with Patient Panel Population Report

1. In the **Reports** folder, expand the **Reports for Local Use: IHS Clinical Measures** folder to display the list of available local reports.
2. Click the **Selected Measures w/Patient Panel Population** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Selected Measures w/Patient Panel** window.

Figure 3-24: Selected Measures w/Patient Panel window

3. If a search template has been selected for a report, the template's name is displayed in the **Search Template** box. If no search template has been selected, the box is empty.

To select a search template, click **Select** next to the **Search Template** box to display the **Search Template** window, and then follow the instructions in [Selecting a Search Template](#).

4. In the **Type of Measure** list, do one of the following:
 - Select one of the predefined sets of performance measures.
 - Select **Selected Measures (User Defined)**, and then click **Select** to display the **Measures** window.

To select measures to report on, follow the instructions in [Selecting Performance Measures](#).

5. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
6. Under **Do you want Patient Lists?**, do one of the following:
 - Click **Yes** to generate patient lists with this report, and then click **Select Measures** to display the **Patient List Measures** window. Follow the instructions in [Selecting Patient Lists](#).
 - Click **No** to run the report without generating patient lists.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **Do you want Patient Lists?** will be inactive for users without this security key.

7. If you chose patient lists in Step 6, select one of the following in the **List Type** list. Otherwise, skip to Step 8.
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**
8. To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).
9. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
10. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.2.3 Selected Measures with All Communities Report

Use this option to generate a report for local use covering selected performance measures for all patients your database, regardless of the communities they reside in.

For more information, see **Section 5.11.2.3** in the **CRS Version 9.0 User Manual** for additional information on the Selected Measures with All Communities Report.

Run the Selected Measures with All Communities report

1. In the **Reports** folder, expand the **Reports for Local Use: IHS Clinical Measures** folder to display the list of available local reports.
2. Click the **Selected Measures w/All Communities** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check..
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Selected Measures w/All Communities** window.

The screenshot shows a software window titled "Selected Measures w/All Commu...". The window contains several configuration fields:

- Type of Measure: [Dropdown]
- Date Range: [Dropdown]
- Report Year: 2009 [Dropdown]
- Base Line Year: 2000 [Dropdown]
- Location Taxonomy for MFI Sites: [Dropdown]
- Do you want Patient Lists?: Yes No [Select Measures]
- List Type: R-Random Patient List [Dropdown]
- Provider: [Dropdown]
- Patient Type: 1-Indian/Alaska Native [Classification 01] [Dropdown]
- Output Type: P-Microsoft Word Format [Dropdown]
- Run Date/Time: Tuesday July 07, 2009 10:41 AM [Dropdown]

At the bottom of the window are three buttons: "Queue", "Close", and "?". The status bar at the bottom left indicates "Not Queued".

Figure 3-25: Selected Measures w/All Communities window

3. In the **Type of Measure** list, do one of the following:
 - Select one of the predefined sets of performance measures.
 - Select **Selected Measures (User Defined)**, and then click **Select** to display the **Measures** window.

To select measures to report on, follow the instructions in [Selecting Performance Measures](#).

4. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
5. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

6. Under **Do you want Patient Lists?**, do one of the following:
 - Click **Yes** to generate patient lists with this report, and then click **Select Measures** to display the **Patient List Measures** window.
To select patient list measures, follow the instructions in [Selecting Patient Lists](#).
 - Click **No** to run the report without generating patient lists.

<p>Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under Do you want Patient Lists? will be inactive for users without this security key.</p>
--

7. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**
To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**

8. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
- 9 To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).
10. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
11. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.2.4 CMS Performance Report

IMPORTANT: The CMS Performance Report has not been updated for the 2009 report year. See the notice below:

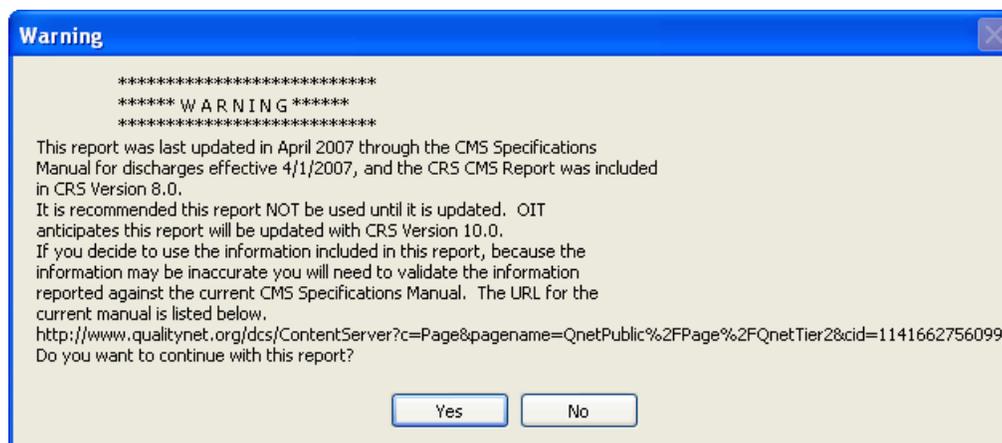


Figure 3-26: CMS Performance Report warning window

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **CMS Performance Report** menu option will not be displayed for users without this security key.

For more information, see Section 5.12 in the CRS Version 9.0 User Manual for additional information on the CMS Performance Report.

Run the CMS Performance Report

1. In the **Reports** folder, expand the **Reports for Local Use: IHS Clinical Measures** folder to display the list of available reports.
2. Click the **CMS Performance Report** option to display the warning message, and then click **Yes** to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **CMS Performance Report** window.

The screenshot shows the 'CMS Performance Report' dialog box. It has a blue title bar with standard window controls. The main area is light beige and contains several sections, each with a blue header and a light blue border. The sections are: 'Select Measures' with a magnifying glass icon; 'Hospital Name' with a text input field containing 'DEMO INDIAN HOSPITAL' and a 'Select' button; 'Date Range' with a blue dropdown arrow; 'Begin Date' with a text input field containing 'Wednesday August 19, 2009' and a dropdown arrow; 'End Date' with a text input field containing 'Wednesday August 19, 2009' and a dropdown arrow; 'Report Year' with a dropdown menu showing '2009'; 'Patient Type' with a dropdown menu showing '3-All (both Indian/Alaska Natives and Non OI)'; 'Print Explanatory/Logic Text With Your Report?' with two radio buttons, 'Yes' being selected; 'Run Date/Time' with a text input field containing 'Wednesday August 19, 2009 10:34 AM' and a dropdown arrow; and two buttons at the bottom: 'Queue' and 'Close'. A status bar at the very bottom of the dialog box says 'Not Queued'.

Figure 3-27: CMS Performance Report window

3. To select performance measures and patient lists, click **Select Measure(s)** at the top of the window and follow the instructions in [Selecting Measures and Patient Lists](#).
4. To select a hospital, click **Select** next to the **Hospital Name** box and follow the instructions in [Selecting a Hospital](#).
5. To set the **Date Range**, **Begin Date** and **End Date**, and **Report Year** options, follow the instructions in [Selecting Report Dates](#).
6. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
7. Under **Print Explanatory/Logic Text With Your Report?**, do one of the following:
 - To include the cover page and report narrative (CMS text and RPMS logic information) in the report, select **Yes**.
 - To run the report without the report narrative, select **No**.
8. To run the report right away, skip to Step 9.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
9. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

10. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3 Other National Reports

3.3.1 GPRA & PART Performance Report

Use this option to produce a report using the same performance measures included in the National GPRA & PART Report, but with user-defined report parameters (report dates, patient population, and community taxonomy).

For more information, see **Section 5.13** in the **CRS Version 9.0 User Manual** for additional information on the GPRA & PART Performance Report.

Run the GPRA & PART Performance Report

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports.
2. Click the **GPRA & PART Performance Report** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **GPRA & PART Performance Report** window.

Figure 3-28: GPRA & PART Performance Report window

3. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
4. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
5. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).
6. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.

- If you are not ready to send final data to your Area Office, click **No**.
7. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
 8. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
 9. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
 10. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.2 Other National Measures Report

Use this option to report on non-GPRA measures for which national data is needed. This report also includes some GPRA measures to provide context for the non-GPRA measures.

The Other National Measures Report can be run in two ways: (1) using the same hard-coded report parameters (Report Period, Previous Year Period, and Baseline Year) as the National GPRA & PART Report, or (2) using custom, user-defined report parameters.

For more information, see **Section 5.14** in the **CRS Version 9.0 User Manual** for additional information on the Other National Measures Report.

Run the Other National Measures Report

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports.
2. Click the **Other National Measures Report** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.

- If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Other National Measures Report** window.

Figure 3-29: Other National Measures Report window

3. Under **Hard-coded/User-defined Report**, do one of the following:
 - To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in [Other National Measures Report: Hard-Coded Report Option](#).
 - To run the report using custom, user-defined parameters, select **User-defined** and follow the instructions in [Other National Measures Report: User-Defined Report Option](#).
4. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.2.1 Other National Measures Report: Hard-Coded Report Option

To run the Other National Measures Report with hard-coded parameters, follow these steps:

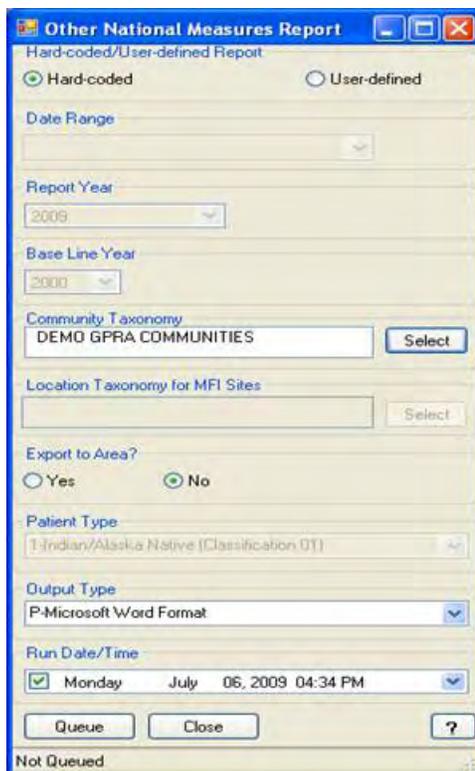


Figure 3-30: Other National Measures Report window (Hard-coded Report option)

1. Under **Hard-coded/User-defined Report**, select **Hard-coded**.
2. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 3. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
3. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

4. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.
5. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
6. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

7. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.2.2 Other National Measures Report: User-Defined Report Option

To run the Other National Measures Report with user-defined parameters, follow these steps:

The screenshot shows a Windows-style dialog box titled "Other National Measures Report". It has a blue title bar with standard window controls. The main area is light beige and contains several sections:

- Hard-coded/User-defined Report:** Two radio buttons. "User-defined" is selected.
- Date Range:** A dropdown menu.
- Report Year:** A dropdown menu showing "2009".
- Base Line Year:** A dropdown menu showing "2000".
- Community Taxonomy:** A text box containing "DEMO GPRA COMMUNITIES" and a "Select" button.
- Location Taxonomy for MFI Sites:** An empty text box and a "Select" button.
- Export to Area?:** Two radio buttons. "No" is selected.
- Patient Type:** A dropdown menu showing "1-Indian/Alaska Native (Classification 01)".
- Output Type:** A dropdown menu showing "P-Microsoft Word Format".
- Run Date/Time:** A dropdown menu showing "Tuesday August 18, 2009 01:35 PM" with a checkmark icon.

At the bottom, there are three buttons: "Queue", "Close", and a help icon "?". Below the buttons, it says "Not Queued".

Figure 3-31: Other National Measures Report window (User-defined Report option)

1. Under **Hard-coded/User-defined Report**, select **User-defined**.
2. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
3. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 4. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
4. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

5. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.
6. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
7. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
8. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
9. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.3 Other National Measures Report Patient List

Use this report option to produce patient lists for one or more performance measure topics included in the Other National Measures Report, including patients who do or do not meet a given measure.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **Other National Measures Report Patient List** menu option will not be displayed for users without this security key.

For more information, see **Section 5.15** in the **CRS Version 9.0 User Manual** for additional information on the Other National Measures Report Patient List.

Run the Other National Measures Report Patient List

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports.
2. Click the **Other National Measures Report Patient List** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Other National Measures Patient List** window.

Figure 3-32: Other National Measures Patient List window

3. To select performance measures and patient lists, click **Select Measure(s)** at the top of the window and follow the instructions in [Selecting Measures and Patient Lists](#).
4. In the **Select By** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**
To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**
5. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

6. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
7. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 8. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
8. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).
9. To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).
10. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
11. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.4 Executive Order Quality Transparency Measures Report

Use this option to report on performance measures in support of Executive Order (EO) 13410 for quality transparency reporting. All federal facilities and sites are required to report this data annually.

The Executive Order Quality Transparency Measures Report can be run in two ways: (1) using the same hard-coded report parameters (Report Period, Previous Year Period, and Baseline Year) as the National GPRA & PART Report, or (2) using custom, user-defined report parameters.

For more information, see **Section 5.16** in the **CRS Version 9.0 User Manual** for additional information on the Executive Order Quality Transparency Measures Report.

Run the Executive Order Quality Transparency Measures Report

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports.
2. Click the **Executive Order Quality Transparency Measures Report** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **EO Quality Transparency Measures** window.

Figure 3-33: EO Quality Transparency Measures window

3. Under **Hard-coded/User-defined Report**, do one of the following:
 - To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in [Executive Order Quality Transparency Measures Report: Hard-Coded Report Option](#).
 - To run the report using custom, user-defined parameters, select **User-defined** and follow the instructions in [Executive Order Quality Transparency Measures Report: User-Defined Report Option](#).
4. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.4.1 Executive Order Quality Transparency Measures Report: Hard-Coded Report Option

To run the Executive Order Quality Transparency Measures Report with hard-coded parameters, follow these steps:

The screenshot shows the 'EO Quality Transparency Measures' window. The 'Hard-coded/User-defined Report' section has 'Hard-coded' selected. The 'Date Range' is empty, 'Base Line Year' is set to 2000, and 'Location Taxonomy for MFI Sites' has a 'Select' button. The 'List Type' is 'R-Random Patient List', 'Patient Type' is 'T-Indian/Alaska Native (Classification 01)', and 'Output Type' is 'P-Microsoft Word Format'. The 'Report Year' is 2009, 'Community Taxonomy' is 'DEMO GPRA COMMUNITIES', 'Do you want Patient Lists?' is 'No', 'Provider' has a 'Select' button, 'Export to Area?' is 'No', and 'Run Date/Time' is 'Tuesday July 07, 2009 10:02 AM'. There are 'Queue', 'Close', and '?' buttons at the bottom. The status bar says 'Not Queued'.

Figure 3-34: EO Quality Transparency Measures window (Hard-coded Report option)

1. Under **Hard-coded/User-defined Report**, select **Hard-coded**.
2. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 3. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
3. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

4. Under **Do you want Patient Lists?**, do one of the following:
 - Click **Yes** to generate patient lists with this report, and then click **Select Measures** to display the **Patient List Measures** window.
To select patient list measures, follow the instructions in [Selecting Patient Lists](#). Continue with Step 5.
 - Click **No** to run the report without generating patient lists. Continue with Step 6.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **Do you want Patient Lists?** will be inactive for users without this security key.

5. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**
To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**
(The **List Type** option is not active if you are not including patient lists in this report.)
6. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.
7. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
8. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.
To close the window without queuing the report, click **Close**.
9. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.4.2 Executive Order Quality Transparency Measures Report: User-Defined Report Option

To run the Executive Order Quality Transparency Measures Report with user-defined parameters, follow these steps:

The screenshot shows the 'EO Quality Transparency Measures' dialog box. The 'Hard-coded/User-defined Report' section has 'User-defined' selected. The 'Measures' section has 'Selected' selected. The 'Date Range' is set to a dropdown menu. The 'Base Line Year' is set to '2000'. The 'Report Year' is set to '2009'. The 'Community Taxonomy' is set to 'DEMO GPRA COMMUNITIES'. The 'Do you want Patient Lists?' section has 'No' selected. The 'List Type' is set to 'R-Random Patient List'. The 'Patient Type' is set to '1-Indian/Alaska Native (Classification 01)'. The 'Output Type' is set to 'P-Microsoft Word Format'. The 'Run Date/Time' is set to 'Tuesday August 18, 2009 02:05 PM'. The 'Queue' and 'Close' buttons are visible at the bottom left, and a help icon is at the bottom right. The status bar at the bottom left says 'Not Queued'.

Figure 3-35: EO Quality Transparency Measures window (User-defined Report option)

1. Under **Hard-coded/User-defined Report**, select **User-defined**.
2. Under **Measures**, do one of the following:
 - To run this report on all performance measures, select **All**.
 - To select specific performance measures for this report, select **Selected**. Click **Select**, and then follow the instructions in [Selecting Performance Measures](#).
3. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
4. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).

5. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

6. Under **Do you want Patient Lists?**, do one of the following:
 - To include patient lists in this report, select **Yes**. Click **Select Measures**, and then follow the instructions in [Selecting Patient Lists](#). Continue with Step 7.
 - To run this report without patient lists, select **No**. Continue with Step 8

<p>Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under Do you want Patient Lists? will be inactive for users without this security key.</p>
--

7. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**

(The **List Type** option is not active if you are not including patient lists in this report.)
8. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
9. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.
10. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).

11. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

12. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.5 Elder Care Report

Use this option to produce a report on quality-of-care measures for patients 55 and older.

For more information, see **Section 5.17** in the **CRS Version 9.0 User Manual** for additional information on the Elder Care Report.

Run the Elder Care Report

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports.
2. Click the **Elder Care Report** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the **Close** button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **Elder Care Report** window.

Figure 3-36: Elder Care Report window

3. Under **Measures**, do one of the following:
 - To run this report on all performance measures, select **All**.
 - To select specific performance measures for this report, select **Selected**. Click **Select**, and then follow the instructions in [Selecting Performance Measures](#).
4. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
5. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 6. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).

6. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

7. Under **Do you want Patient Lists?**, do one of the following:
 - To include patient lists in this report, select **Yes**. Click **Select Measures**, and then follow the instructions in [Selecting Patient Lists](#). Continue with Step 8.
 - To run this report without patient lists, select **No** and skip to step 9.

<p>Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under Do you want Patient Lists? will be inactive for users without this security key.</p>
--

8. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**

(The **List Type** option is not active if you are not including patient lists in this report.)
9. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
10. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.

(If you chose to report only on selected performance measures in Step 3, the **Export to Area?** options are not active.)

11. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
12. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
13. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.3.6 HEDIS Performance Report

Use this option to produce a HEDIS Performance Report if your tribe or site is interested in National Committee for Quality Assurance (NCQA) certification. This report is not required.

For more information, see **Section 5.18** in the **CRS Version 9.0 User Manual** for additional information on the HEDIS Performance Report.

Run the HEDIS Performance Report

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports.
2. Click the **HEDIS Performance Report** option to display the **Taxonomy Check** window containing information about the report and the results of the taxonomy check.
 - If a message is displayed stating that one or more taxonomies are missing or have no entries, you must set up the taxonomies before running this report. Click the Close button in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.

- If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **OK** to close the window and display the **HEDIS Report** window.

Figure 3-37: HEDIS Report window

3. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
4. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
5. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

6. Under **Do you want Patient Lists?**, do one of the following:
 - Click **Yes** to generate patient lists with this report, and then click **Select Measures** to display the **Patient List Measures** window.
To select patient list measures, follow the instructions in [Selecting Patient Lists](#).
 - Click **No** to run the report without generating patient lists. Continue with Step 8.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **Do you want Patient Lists?** will be inactive for users without this security key.

7. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**
To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**
(The **List Type** option is not active if you are not including patient lists in this report.)
8. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
9. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.
10. To set the **Output Type** and **Run Date/Time** options, follow the instructions in [Selecting Report Output Options](#).

11. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

12. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.4 Patient Education Reports

3.4.1 Patient Education w/Community Specified

Use this option to produce a report on performance measures for patients who have received patient education.

For more information, see **Section 5.19** in the **CRS Version 9.0 User Manual** for additional information on the Patient Education w/Community Specified report.

Run the Patient Education with Community Specified report

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports, and then expand the **Patient Education Reports** folder.
2. Click the **Patient Education w/Community Specified** option to display the **Taxonomy Check** window containing information about the report. Click **OK** to close the window and display the **Patient Ed with Community Specified** window.

Figure 3-38: Patient Ed with Community Specified window

3. Under Measures, do one of the following:
 - To run this report on all performance measures, select **All**.
 - To select specific performance measures for this report, select **Selected**. Click **Select**, and then follow the instructions in [Selecting Performance Measures](#).
4. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

5. Under **Community Taxonomy**, do one of the following:
 - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 6. (Your site's default community taxonomy is defined using the [Site Parameters](#) option.)
 - To select a different community taxonomy, click **Select** next to the **Community Taxonomy** box and follow the instructions in [Selecting a Community Taxonomy](#).
6. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

7. Under **Do you want Patient Lists?**, do one of the following:
 - To include patient lists in this report, select **Yes**. Click **Select Measures**, and then follow the instructions in [Selecting Patient Lists](#). Continue with Step 8.
 - To run this report without patient lists, select **No** and skip to step 9.

<p>Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under Do you want Patient Lists? will be inactive for users without this security key.</p>
--

8. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**

(The **List Type** option is not active if you are not including patient lists in this report.)
9. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)

10. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.(If you chose to report only on selected performance measures in Step 3, the **Export to Area?** options are not active.)
11. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
12. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
13. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.4.2 Patient Education w/Patient Panel Population

Use this option to produce a report on performance measures for patients in a user-defined search template who have received patient education.

For more information:

See **Section 5.20** in the **CRS Version 9.0 User Manual** for additional information on the Patient Education w/Patient Panel Population report.

Run the Patient Education with Patient Panel Population report

1. In the **Reports** folder, expand the **Other National Reports** folder to display the list of available national reports, and then expand the **Patient Education Reports** folder.
2. Click the **Patient Education w/Patient Panel Population** option to display the **Taxonomy Check** window containing information about the report. Click **OK** to close the window and display the **Patient Education w/Patient Panel** window.

Figure 3-39: Patient Education w/Patient Panel window

3. Under Measures, do one of the following:
 - To run this report on all performance measures, select **All**.
 - To select specific performance measures for this report, select **Selected**. Click **Select**, and then follow the instructions in [Selecting Performance Measures](#).

4. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
5. Under **Select Search Template**, click **Select** to display the **Search Template** window, and then follow the instructions in [Selecting a Search Template](#).
6. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

7. Under **Do you want Patient Lists?**, do one of the following:
 - To include patient lists in this report, select **Yes**. Click **Select Measures**, and then follow the instructions in [Selecting Patient Lists](#). Continue with Step 8.
 - To run this report without patient lists, select **No** and skip to step 9.

<p>Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under Do you want Patient Lists? will be inactive for users without this security key.</p>
--

8. In the **List Type** list, select one of the following:
 - **R - Random Patient List**
 - **P - Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - **A - All Patients**

(The **List Type** option is not active if you are not including patient lists in this report.)
9. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)

10. Under **Export to Area?**, do one of the following:
 - To send final data to your Area Office, click **Yes**.
 - If you are not ready to send final data to your Area Office, click **No**.(If you chose to report only on selected performance measures in Step 3, the **Export to Area?** options are not active.)
11. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
12. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.
13. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.5 Taxonomy Reports

3.5.1 Lab Taxonomy Reports

Lab taxonomy reports are available for the following CRS reports:

- National GPRA & PART Report and the GPRA & PART Performance Report
- Other National Measures Report
- Executive Order Quality Transparency Measures Report
- Selected Measures Reports
- Elder Care Report
- HEDIS Performance Report
- CMS Performance Report

For more information:

See **Section 5.21** in the **CRS Version 9.0 User Manual** for additional information on the lab taxonomy reports.

Run a lab taxonomy report

1. In the **Reports** folder, expand the **Taxonomy Reports** folder and the **Lab Taxonomy Reports** folder to display the list of available lab taxonomy reports.
2. Click the option for the lab taxonomy report you want to run to display the **Taxonomy Check** window containing information about the report. Click the Close button in the top right corner to close the window and display the **Lab Taxonomy Report** window.



Figure 3-40: Lab Taxonomy Report window

3. To run the report right away, skip to Step 4.
 - To queue the report to run at a different date and/or time, follow these steps:
 - a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
4. Click **Queue** to display the **Enter Report File Name** window.
5. Type a file name for the report in the **Report File Name** box, and then click **OK**.

The **Enter Report File Name** window and the report definition window both disappear while the report runs.
6. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.5.2 Medication Taxonomy Reports

Medication taxonomy reports are available for the following CRS reports:

- National GPRA & PART Report and the GPRA & PART Performance Report
- Other National Measures Report
- Executive Order Quality Transparency Measures Report
- Selected Measures Reports
- Elder Care Report
- HEDIS Performance Report
- CMS Performance Report

For more information, see **Section 5.22** in the **CRS Version 9.0 User Manual** for additional information on the medication taxonomy reports.

Run a medication taxonomy report

1. In the **Reports** folder, expand the **Taxonomy Reports** folder and the **Medication Taxonomy Reports** folder to display the list of available lab taxonomy reports.
2. Click the option for the lab taxonomy report you want to run to display the **Taxonomy Check** window containing information about the report. Click the Close button in the top right corner to close the window and display the **Med Taxonomy Report** window.



Figure 3-41: Med Taxonomy Report window

3. To run the report right away, skip to Step 4.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
- b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
4. Click **Queue** to display the **Enter Report File Name** window.
5. Type a file name for the report in the **Report File Name** box, and then click **OK**.

The **Enter Report File Name** window and the report definition window both disappear while the report runs.

6. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

4.0 Setting Up Visual CRS 2009

4.1 Taxonomy Check

Before running a report, the taxonomies required for the report must be set up and populated in Visual CRS 2009. Use the appropriate **Taxonomy Check** menu option to scan for missing taxonomies or taxonomies with no entries before running a report.

The first time you use Visual CRS 2009, you should expect to see a list of taxonomies that are new to the 2009 software and have no entries. Taxonomies that existed before the 2009 version of CRS will retain the members previously associated to them and will not be overwritten with blank taxonomies.

You should run the taxonomy check for each report that your facility will run. If there are reports that your facility will not run, you do not need to run the taxonomy checks for those reports. For example, if your facility does not run the CMS or HEDIS reports, you can skip those taxonomy checks.

For more information, see **Section 4.4** in the **CRS Version 9.0 User Manual** for additional information on the **Taxonomy Check** options.

Check the taxonomies for a report

1. In the **Setup** folder, expand the **Taxonomy Check** folder to display the following options:

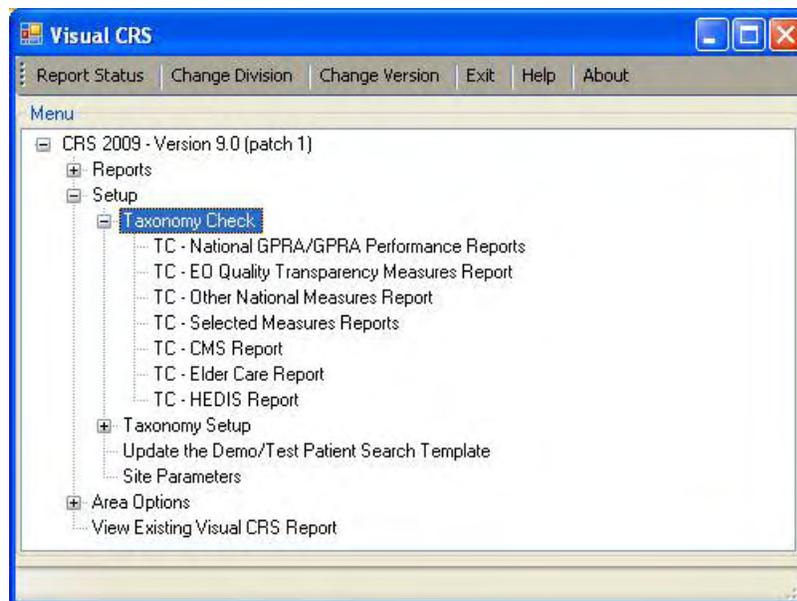


Figure 4-1: Taxonomy Check menu options

2. Click the option for the report taxonomies you want to check (e.g., **TC - Other National Measures Report**).
3. The software checks the taxonomies for the selected report.
 - If all taxonomies required for the report have been set up and populated, a message is displayed stating that all taxonomies are present. Click **OK** close the window.
 - If all taxonomies required for a report have not been set up and populated, a message is displayed stating that one or more taxonomies are missing or have no entries. Use the [Taxonomy Setup option](#) to add the missing taxonomies before running the report.

After all required taxonomies have been set up, repeat Step 2 to run the taxonomy check again before running the report.

For more information, see **Section 4.5** of the **CRS Version 9.0 User Manual** for additional information on setting up taxonomies.

4.2 Taxonomy Setup

Before running a report, the taxonomies required for the report must be set up and populated in Visual CRS 2009. Use the **Taxonomy Setup** menu option to set up the taxonomies required by CRS reports by adding or editing members and to view existing taxonomies.

You should set up the taxonomies for each report that your facility will run. If there are reports that your facility will not run, you do not need to set up taxonomies for those reports. For example, if your facility does not run the CMS Report, you can skip that taxonomy setup.

Notes:

All taxonomies should be reviewed for completeness, even though many of the taxonomies used by CRS have already been established and populated by other RPMS applications (e.g., Diabetes Management) or by CRS Version 8.0 2008.

Users must have the BGPZ TAXONOMY EDIT security key to edit lab and medication taxonomies used by CRS. Users without this security key can view the items included in taxonomies, but cannot edit them.

For more information, see **Section 4.5** in the **CRS Version 9.0 User Manual** for additional information on setting up taxonomies.

Set up taxonomies

1. In the **Setup** folder, expand the **Taxonomy Setup** folder to display the following options:

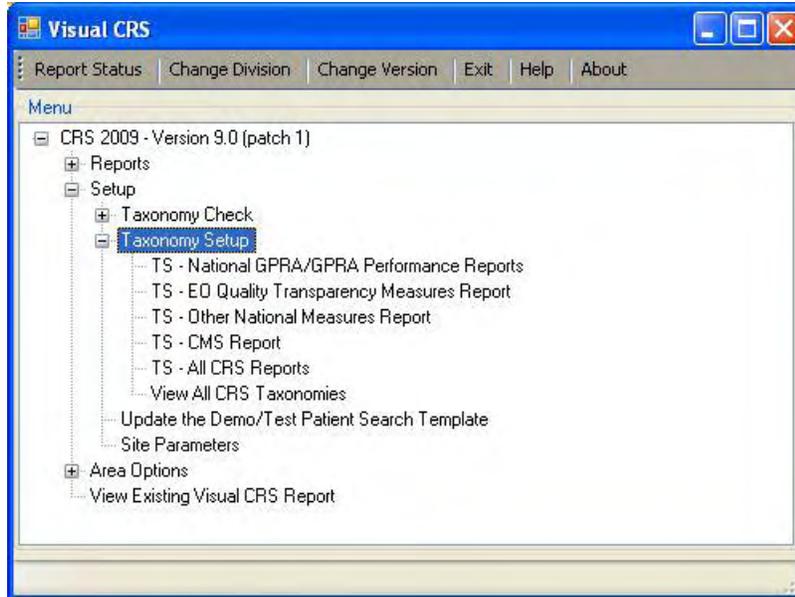


Figure 4-2: Taxonomy Setup menu options

2. Click the option for the report taxonomies you want to set up (e.g., **TS - National GPRA/GPRA Performance Reports**).
3. A message is displayed stating that it could take some time to load the taxonomy files. Click **Yes** to continue and display the **Add/Edit Taxonomy** window.
4. Click the **Select Taxonomy** arrow to display a list of site-populated taxonomies for the selected report, and then click the taxonomy you want to edit. The items currently in the taxonomy and the items available to be added are displayed.

The example below shows the DM AUDIT LDL CHOLESTEROL (Editable/Lab/60) taxonomy. The current members of the taxonomy appear in the **Taxonomy Items** list (the right pane), while the items in the **Items to Choose From** list (the left pane) are available to be added to the taxonomy.

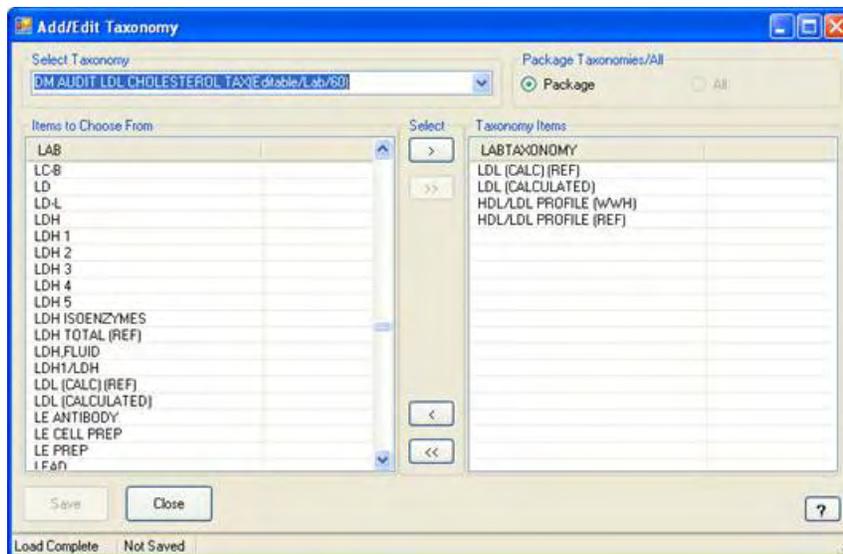


Figure 4-3: Add/Edit Taxonomy window

5. To add or remove items, do one of the following:
 - To add an item to the taxonomy, click an item in the **Items to Choose From** list to select it, and then click > to move it to the **Taxonomy Items** list. A selected item appears highlighted in blue.
To add multiple items, select contiguous items by holding down the SHIFT key, or select noncontiguous items by holding down the CTRL key. Click > to move the selected items to the **Taxonomy Items** list.
 - To remove an item from the taxonomy, click an item in the **Taxonomy Items** list to select it, and then click < to remove it from the list.
To remove multiple items, select contiguous items by holding down the SHIFT key, or select noncontiguous items by holding down the CTRL key. Click < to move the selected items to the Taxonomy Items list.
To remove all items from the taxonomy, click <<.
6. To save changes to the taxonomy, click **Save**.
7. To exit from the **Add/Edit Taxonomy** window, click **Close**.

View existing taxonomies

To view all CRS taxonomies in a read-only **View Taxonomy** window, including both site-populated lab and medication taxonomies and hard-coded taxonomies (such as those for ICD-9 and CPT codes included in the CRS definitions), follow these steps:

1. In the **Setup** folder, expand the **Taxonomy Setup** folder to display the following options:

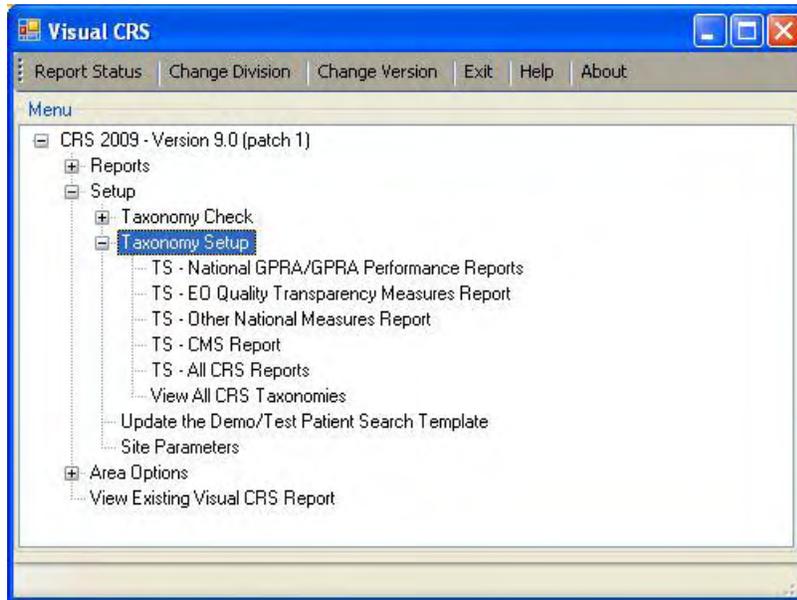


Figure 4-4: Taxonomy Setup menu options

2. Click **View All CRS Taxonomies**.
3. A message is displayed stating that it could take some time to load the taxonomy files. Click **Yes** to continue and display the **View Taxonomy** window.
4. Click the arrow next to the **Select Taxonomy** list to display a list of all CRS taxonomies, both hard-coded and site-populated, and then click the taxonomy you want to view. The items currently in the taxonomy are displayed in the **Taxonomy Items** list (the right pane).

The example below shows the DM AUDIT LDL CHOLESTEROL (Editable/Lab/60) taxonomy in the **View Taxonomy** window.

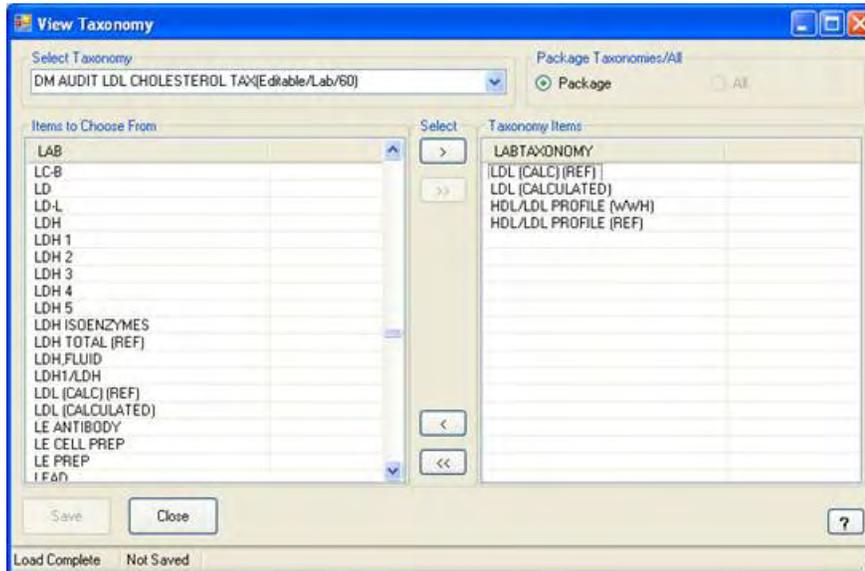


Figure 4-5: View Taxonomy window

4.3 Updating the Demo/Test Patient Search Template

The demo/test patient search template contains the names of all “demo” and “test” patients in a site’s database and is used to exclude these patients from all CRS reports. Use the **Update the Demo/Test Patient Search Template** option to create a new demo/test patient search template or update an existing one.

Note: To select the demo/test patient search template that CRS uses to run a site's reports, use the [Site Parameters](#) option.

For more information, see **Section 4.7** in the **CRS Version 9.0 User Manual** for additional information on updating the demo/test patient search template.

Update the demo/test patient search template

1. In the **Setup** folder, click the **Update the Demo/Test Patient Search Template** option to display the **Demo Search Template** window.

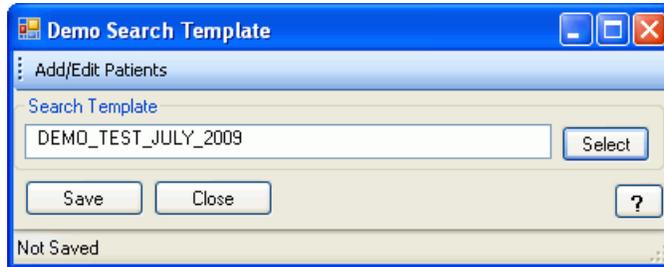


Figure 4-6: Demo Search Template window

2. To create a new demo/test patient search template or select an existing one to update, click **Select** to display the **Search Templates** window, and then follow the instructions in [Creating or Selecting a Demo/Test Patient Search Template](#).
3. To add or remove patients in the search template, click **Add/Edit Patients** at the top of the window, and then follow the instructions in [Selecting Multiple Patients](#).
4. To close the window and save the new or edited template, click **Save**, or click **Close** to close the window without saving your changes.

4.4 Site Parameters

Use the **Site Parameters** option to set values for a specific site that are used repeatedly throughout CRS. These values include the following:

- The site's default community taxonomy
- The site's Home location
- Whether the site is a CHS-only site
- Whether to export height and weight data to the site's Area Office by default
- The search template used by CRS to exclude "demo" and "test" patients from reports

Note: The **Site Parameters** menu option is only available to users holding the BGPZ SITE PARAMETERS security key. Users without this key will not see this menu option and cannot set site parameters.

Site parameters are set for the location displayed in the **Location** box at the top of the **CRS Site Parameters** window. Users at sites with multi-divisional databases can set or edit site parameters for other sites in the same database.

If a site has not yet been set up in CRS (that is, its site parameters have not yet been set), CRS cannot run reports for that location. Use the **CRS Site Parameters** window to set up a site in CRS for the first time.

Before setting parameters in the **CRS Site Parameters** window, be sure you have selected the correct location.

For more information, see **Section 4.2** in the **CRS Version 9.0 User Manual** for additional information on each of the site parameters set using this option.

Select the location to set site parameters

When you open the **CRS Site Parameters** window, if you have previously created site parameters for the location you are currently logged in to, the name of the location appears in the **Location** box, and the parameters for this location will be displayed.

If you have previously created site parameters for another location in the same multi-divisional database, or if you want to set up a location in CRS and set its parameters for the first time, you can view, edit, or set those site parameters by selecting the correct location in the **Location** box.

Note: CRS runs reports for the location that you selected when you logged in to the CRS GUI. Selecting a different location in the **CRS Site Parameters** window only affects the site whose parameters you are editing; it does not change the location that you are logged in to.

To change the location that you run reports for, click **Change Division** at the top of the **Visual CRS** window to display the **Change Division** window, and then select the new location.

For example, if your multi-divisional database contains data for Facilities A, B, and C, and you are logged in to Facility A, you can edit the site parameters for Facilities B and C by selecting them in the **Location** box. However, your CRS reports would still be run for Facility A.

To run reports for a different facility, click **Change Division** and select the new facility as described above.

To select a location to set site parameters, follow these steps:

1. In the **Setup** folder, click the **Site Parameters** option to display **CRS Site Parameters** window.

Figure 4-7: CRS Site Parameters window

2. The site displayed in the **Location** box determines the site whose parameters are being set using the **Site Parameters** option. You can set or edit site parameters for the location you are currently logged in to, or you can select a new or existing location in the same multi-divisional database.

Under **Location**, do one of the following:

- *To set or change site parameters for the location you are currently logged in to, no changes to the **Location** box are required. Continue with the instructions for [setting site parameters](#) below.*

- *To view or edit site parameters for another site (one in the same multi-divisional database) that has already been set up in CRS, click **Select Location** next to the **Location** box to display the **New or Existing Location?** message.*



Figure 4-8: New or Existing Location? message

Click **Yes** (edit site parameters for an existing location) to display the **Select Location** window.



Figure 4-9: Select Location window

Select a location from the **Site Parameter Location** list, and then click **OK** to save the selection and return to the **Site Parameters** window. Continue with the instructions for [setting site parameters](#) below.

- *To set up a new location (one in the same multi-divisional database) in CRS, click **Select Location** next to the **Location** box to display the **New or Existing Location?** message.*

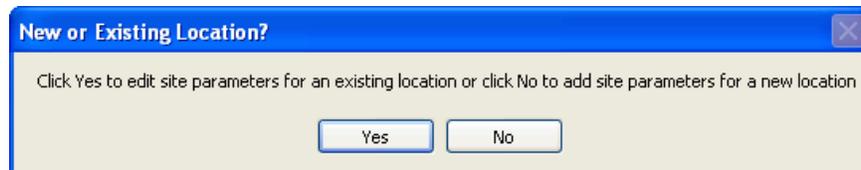


Figure 4-10: New or Existing Location? message

Click **No** (add site parameters for a new location) to display the **Locations** window, and then follow the instructions in [Selecting a Location](#).

After you select a location, continue with the instructions for [setting site parameters](#) below.

Note: The sites listed in the **Locations** window are not limited to sites within your multi-divisional database. Be sure to set or edit site parameters only for sites in your database.

Set site parameters

To set site parameters for the location displayed in the **Location** box, follow these steps:

1. If no default community taxonomy has been selected for your site, the **Default COMMUNITY Taxonomy** box is empty. If a taxonomy has been selected, it is displayed in the **Default COMMUNITY Taxonomy** box.

Under **Default COMMUNITY Taxonomy**, do one of the following:

- To remove a taxonomy displayed in the **Default COMMUNITY Taxonomy** box, click **Clear Field**.
 - To set or change the default community taxonomy that will be used for CRS reports, click **Select Taxonomy** and follow the instructions in [Selecting a Community Taxonomy](#).
2. If no location has been selected for your site's Home location, the **Site's Home Location** box in the **CRS Site Parameters** window is empty. If a location has been selected, it is displayed in the **Site's Home Location** box.

Under **Site's Home Location**, do one of the following:

- To remove a location displayed in the **Site's Home Location** box, click **Clear Field**.
 - To set or change the Home location that will be used to report Public Health Nursing home visits by your installation of CRS, click **Select Location** and follow the instructions in [Selecting a Location](#).
3. If your facility is *not* within the Alaska Area, the **Select** button next to the **Location Taxonomy for MFI Sites** box is inactive and no action is required.

If your facility is within the Alaska Area, click **Select** next to the **Location Taxonomy for MFI Sites** box and follow the instructions in [Selecting a Community Taxonomy](#).

4. Under **CHS Only Site?**, do one of the following:
 - If your site offers *only* CHS services to its patients, select **Yes**.
 - If your site offers *any* direct services, select **No**.

See **Section 4.2** in the **CRS Version 9.0 User Manual** for information about this site parameter.

5. Under **Export Height and Weight Data?**, do one of the following:
 - If this site is a Tribal facility that does not want to export height and weight data to your Area Office and IHS Division of Epidemiology, select **No**.
 - If this site is not a Tribal facility, this option must be set to **Yes**.

See **Section 4.2** in the **CRS Version 9.0 User Manual** for information about this site parameter.

6. If no template has been selected for your site's demo/patient search template, the **Site's Demo Patient Search Template** box in the **CRS Site Parameters** window is empty. If a template has been selected, it is displayed in the **Site's Demo Patient Search Template** box.

Under **Site's Demo Patient Search Template**, do one of the following:

- To remove a search template displayed in the **Site's Demo Patient Search Template** box, click **Clear Field**.
- To select the demo/test patient search template that will be used by this site's installation of CRS, click **Select Template** and follow the instructions in [Selecting a Site's Demo/Test Patient Search Template](#).

The demo/test patient search template contains the names of all “demo” and “test” patients in your database and is used to exclude these patients from all CRS reports.

Note: The demo/test patient search template is created and updated using the [Update the Demo/Test Patient Search Template](#) option. See **Section 4.2** in the **CRS Version 9.0 User Manual** for information about this site parameter.

7. To save your settings and close the **CRS Site Parameters** window, click **Save**.

To close the window without saving your settings, click **Close**.

5.0 Area Options

5.1 List/Upload Report Files From Site

Area Offices use this option to upload data files to CRS that have been received from facilities.

For more information, see

- **Section 6.1** in the **CRS Version 9.0 User Manual** for additional information on the uploading report files.
- [About CRS file names](#) at the end of this topic for information about report file names and extensions.

List and upload report files

1. Expand the **Area Options** folder to display the list of available options.
2. Click the **List/Upload Report Files From Site** option to display the **Upload Files** window.

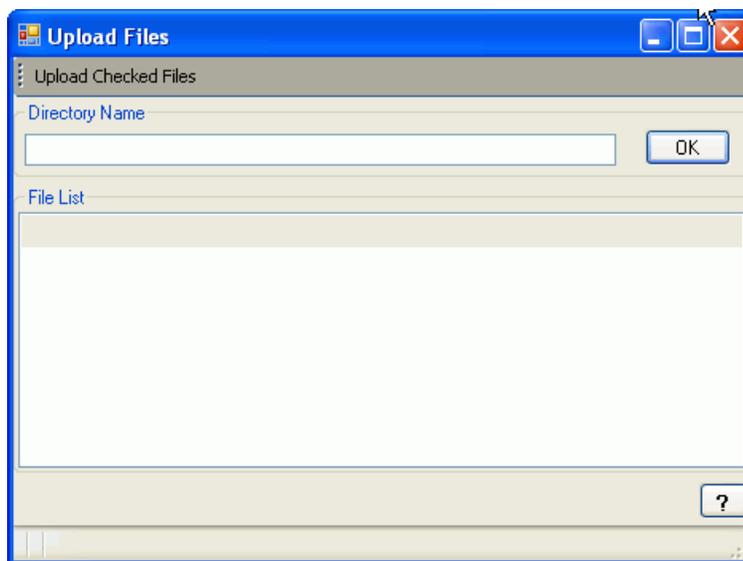


Figure 5-1: Upload Files window

3. In the **Directory Name** box, type the name of the network directory (e.g., **Q:**) to which facilities have transmitted their data files using FTP. Click **OK** to load the list of files in the directory.

Note: Only FileMan data files created by CRS 2009 Version 9.0 will be listed in the File List pane.

- Click the check box next to each file that you want to upload to CRS.

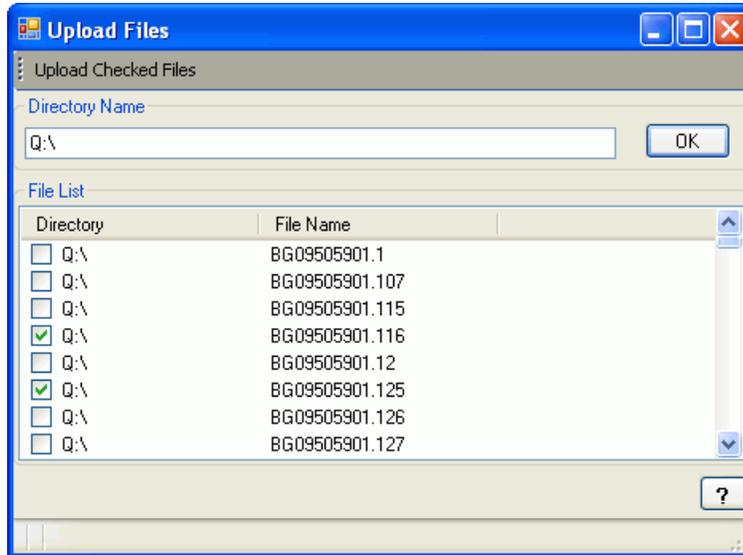


Figure 5-2: Upload Files window with files checked to upload

- To upload the selected files, click **Upload Checked Files** at the top of the window.
- When files have been successfully uploaded, the words "Files Uploaded Successfully" will be displayed in the status bar at the bottom of the window.
- To close the **Upload Files** window, click  in the top right corner of the window.

About CRS file names

When each facility runs the Area National GPRA & PART Report, the Area GPRA & PART Performance Report, the Area Other National Measures Report, the Area EO Quality Transparency Measures Report, the Area Elder Care Report, the Area HEDIS Performance Report, or the Area Patient Education with Community Specified report, the facility's CRS installation assigns a file name to the data file.

Each file name begins with "BG09" followed by the six-digit ASUFAC code for the facility that created and transmitted the file, and ends with one of the following extensions, where

- HE identifies HEDIS Performance Reports.
- ONM identifies Other National Measures Reports.
- EO identifies EO Quality Transparency Measures Reports.
- EL identifies Elder Care Reports.
- PED identifies Patient Education with Community Specified Reports.

GPRA & PART Performance Reports are treated the same way as National GPRA & PART Reports and will be displayed with them if they have a report period of July 1, 2008 through June 30, 2009, a baseline year of 2000, and a population of AI/AN only. These reports have only numbers in the file name extension (e.g., BG09505901.115).

5.2 2010 Area National GPRA & PART Report

Use this option to produce an Area Aggregate GPRA & PART Report for the 2010 GPRA year aggregating all data received to date from the facilities in your area.

For more information, see **Section 6.2.1** in the **CRS Version 9.0 User Manual** for additional information on the Area National GPRA & PART Report.

Run the 2010 Area National GPRA & PART Report

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **2010 Area National GPRA & PART Report** option to display the **2010 Area National GPRA Report** window.

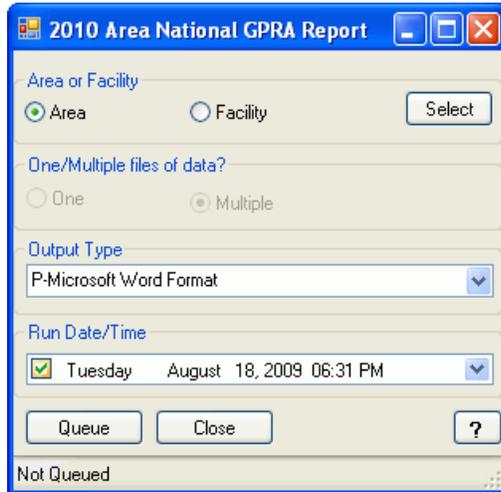


Figure 5-3: 2010 Area National GPRA Report window

3. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.
In the **Facilities** window, click **Add All** to select all sites and add them to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

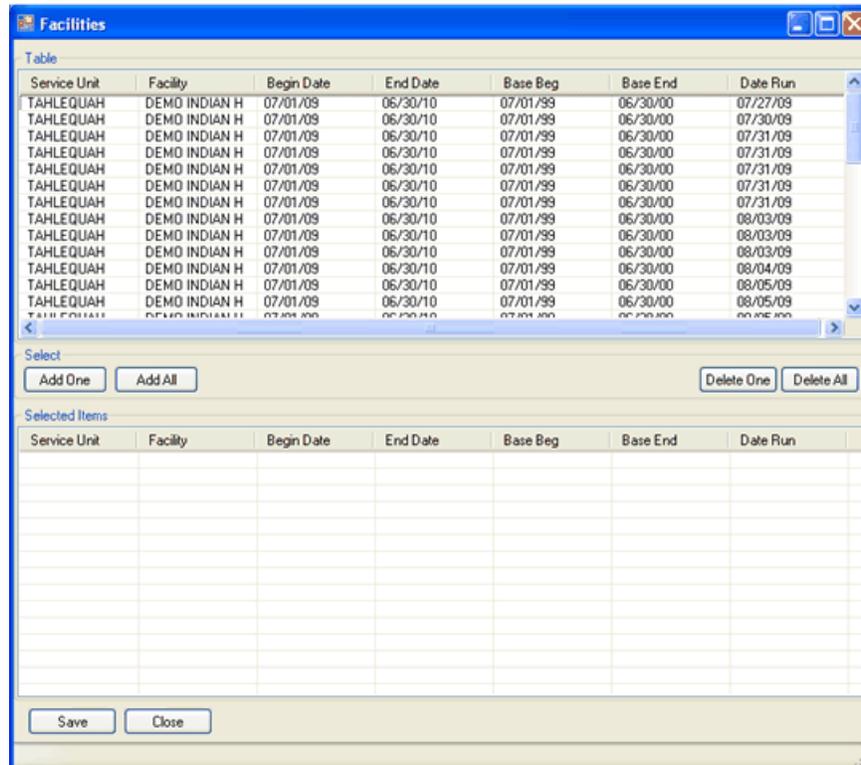


Figure 5-4: Facilities window

- To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.3 Area National GPRA & PART Report

Use this option to produce an area aggregate GPRA & PART report aggregating all data received to date from the facilities in your area.

For more information, See **Section 6.2.1** in the **CRS Version 9.0 User Manual** for additional information on the Area National GPRA & PART Report.

Run the Area National GPRA & PART Report

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area National GPRA & PART Report** option to display the **Area National GPRA & PART Report** window.

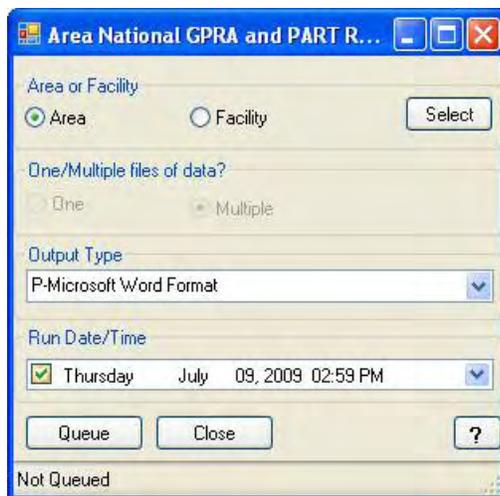


Figure 5-5: Area National GPRA & PART Report window

3. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.
In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

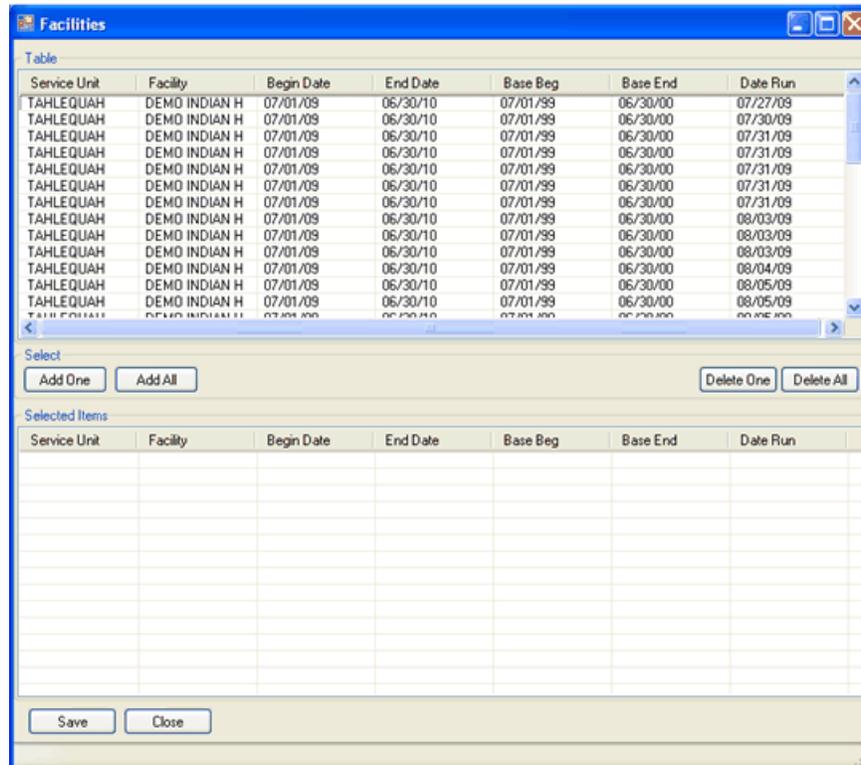


Figure 5-6: Facilities window

- To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.4 Area National GPRA & PART Report Perf Summaries

Use this option to produce a area aggregate of clinical performance summaries aggregating all data received to date from the facilities in your area.

For more information, see **Section 6.2.2** in the **CRS Version 9.0 User Manual** for additional information on the Area National GPRA & PART Report Performance Summaries.

Run the Area National GPRA & PART Report Perf Summaries

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area National GPRA & PART Report Perf Summaries** option to display the **Area National GPRA & PART Report Perf Summaries** window.

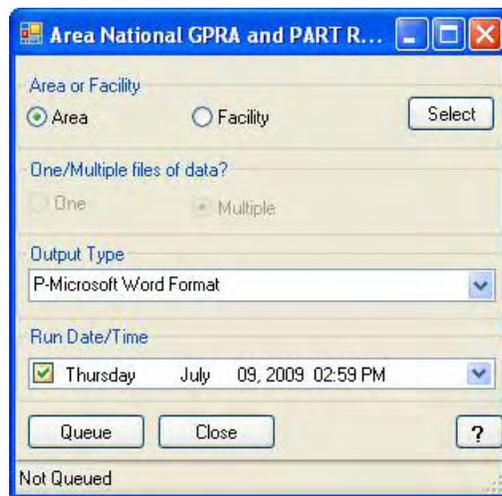


Figure 5-7: Area National GPRA & PART Report Perf Summaries window

3. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.
In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

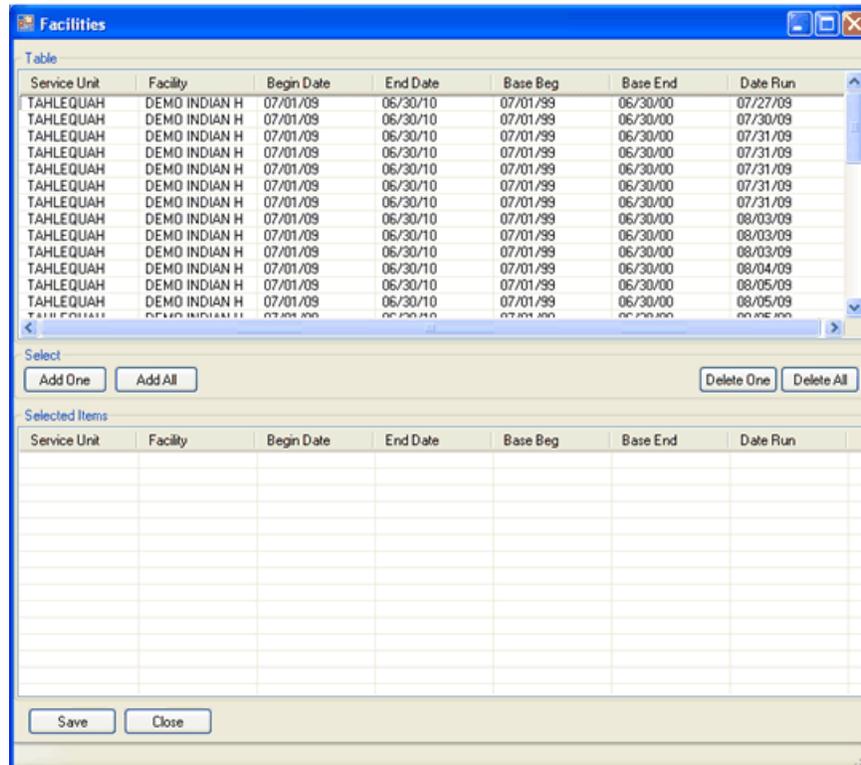


Figure 5-8: Facilities window

- To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.5 Area GPRA & PART Performance Report

Use this option to produce an area aggregate GPRA & PART performance report aggregating all data received to date from the facilities in your area. This report uses the same performance measures included in the National GPRA & PART Report, but with user-defined report parameters (report dates, patient population, and community taxonomy).

For more information, see **Section 6.2.3** in the **CRS Version 9.0 User Manual** for additional information on the Area GPRA & PART Performance Report.

Run the Area GPRA & PART Report

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area GPRA & PART Performance Report** option to display the **Area GPRA Performance Report** window.

Figure 5-9: Area GPRA Performance Report window

3. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

4. In the **Patient Type** list, select one of the following beneficiary populations to report on:

- **1 - Indian/Alaska Native** (Classification 01)
- **2 - Not Indian Alaskan/Native** (Not Classification 01)
- **3 - All** (Both Indian/Alaska Natives and Non-01)

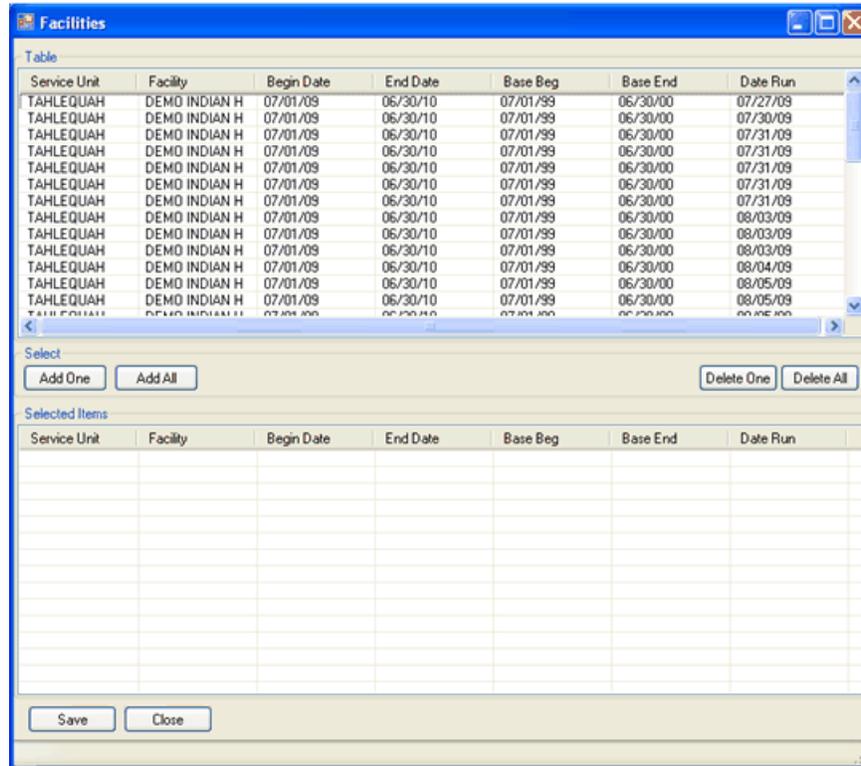
5. Under **Area or Facility**, do one of the following:

- To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.



The screenshot shows a window titled "Facilities" with a table of data. The table has columns for Service Unit, Facility, Begin Date, End Date, Base Beg, Base End, and Date Run. The data is as follows:

Service Unit	Facility	Begin Date	End Date	Base Beg	Base End	Date Run
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/27/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/30/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/03/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/03/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/03/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/04/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/05/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/05/09

Below the table are buttons for "Add One", "Add All", "Delete One", and "Delete All". There is also a "Selected Items" section with an empty table and "Save" and "Close" buttons at the bottom.

Figure 5-10: Facilities window

6. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
7. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.6 Area Other National Measures Report

Use this option to produce an area aggregate report on non-GPRA measures for which national data is needed. This report aggregates all data received to date from the facilities in your area.

The Area Other National Measures Report can be run in two ways: (1) using the same hard-coded report parameters (Report Period, Previous Year Period, and Baseline Year) as the National GPRA & PART Report, or (2) using custom, user-defined report parameters.

For more information, see **Section 6.2.4** in the **CRS Version 9.0 User Manual** for additional information on the Area Other National Measures Report.

Run the Area Other National Measures Report

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area Other National Measures Report** option to display the **Area Other National Measures Report** window.

Figure 5-11: Area Other National Measures Report window

3. Under **Hard-coded/User-defined Report**, do one of the following:
 - To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in [Area Other National Measures Report: Hard-Coded Report Option](#).
 - To run the report using custom, user-defined parameters, select **User-defined** and follow the instructions in [Area Other National Measures Report: User-Defined Report Option](#).
4. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.6.1 Area Other National Measures Report: Hard-Coded Option

To run the Area Other National Measures Report with hard-coded parameters, follow these steps:

The screenshot shows a software window titled "Area Other National Measures R...". The window contains several sections for configuring a report:

- Hard-coded/User-defined Report:** Two radio buttons are present. "Hard-coded" is selected, and "User-defined" is unselected.
- Date Range:** A dropdown menu is currently empty.
- Report Year:** A dropdown menu is set to "2009".
- Base Line Year:** A dropdown menu is set to "2000".
- Patient Type:** A dropdown menu is set to "1-Indian/Alaska Native (Classification 01)".
- Area or Facility:** Two radio buttons are present. "Area" is selected, and "Facility" is unselected. A "Select" button is located to the right of the "Facility" radio button.
- Output Type:** A dropdown menu is set to "P-Microsoft Word Format".
- Run Date/Time:** A dropdown menu is set to "Tuesday August 18, 2009 03:14 PM". A checkmark is visible to the left of the text.

At the bottom of the window, there are three buttons: "Queue", "Close", and "?". Below the buttons, the text "Not Queued" is displayed.

Figure 5-12: Area Other National Measures Report window (Hard-coded Report option)

1. Under **Hard-coded/User-defined Report**, select **Hard-coded**.
2. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

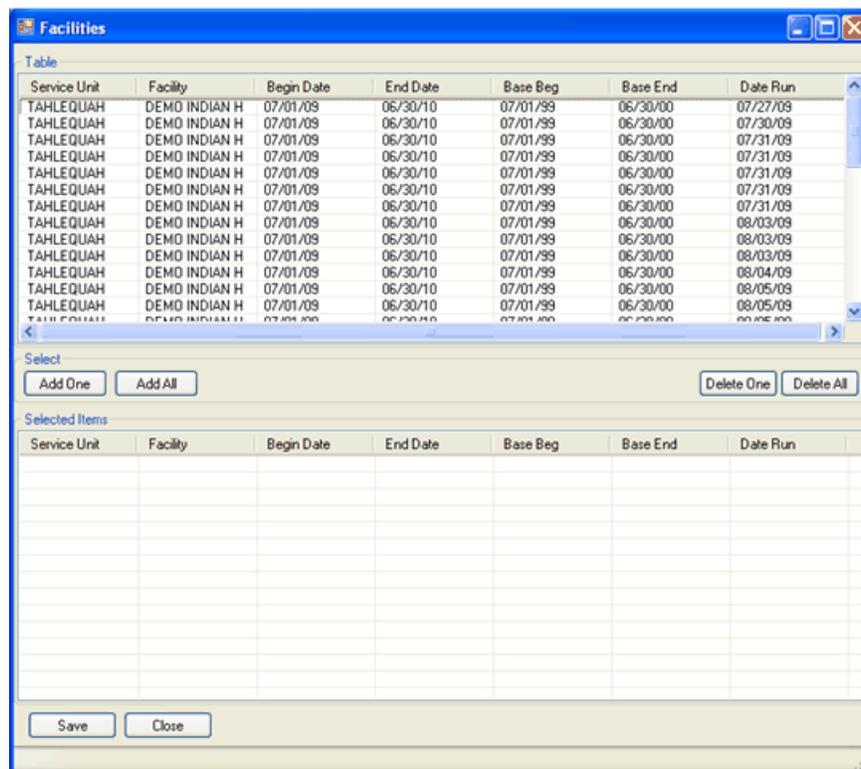


Figure 5-13: Facilities window

3. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).

- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.6.2 Area Other National Measures Report: User-Defined Option

To run the Area Other National Measures Report with user-defined parameters, follow these steps:

The screenshot shows a window titled "Area Other National Measures R...". It has a "Hard-coded/User-defined Report" section with "User-defined" selected. Below are several sections with dropdown menus: "Date Range", "Report Year" (2009), "Base Line Year" (2000), "Patient Type" (1-Indian/Alaska Native (Classification 01)), "Area or Facility" (Area selected, Facility unselected, and a "Select" button), "Output Type" (P-Microsoft Word Format), and "Run Date/Time" (checked, Tuesday August 18, 2009 03:14 PM). At the bottom are "Queue", "Close", and "?" buttons. A "Not Queued" status is shown at the very bottom.

Figure 5-14: Area Other National Measures Report window (User-defined Report option)

- Under **Hard-coded/User-defined Report**, select **User-defined**.
- To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

3. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
4. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.
 - To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

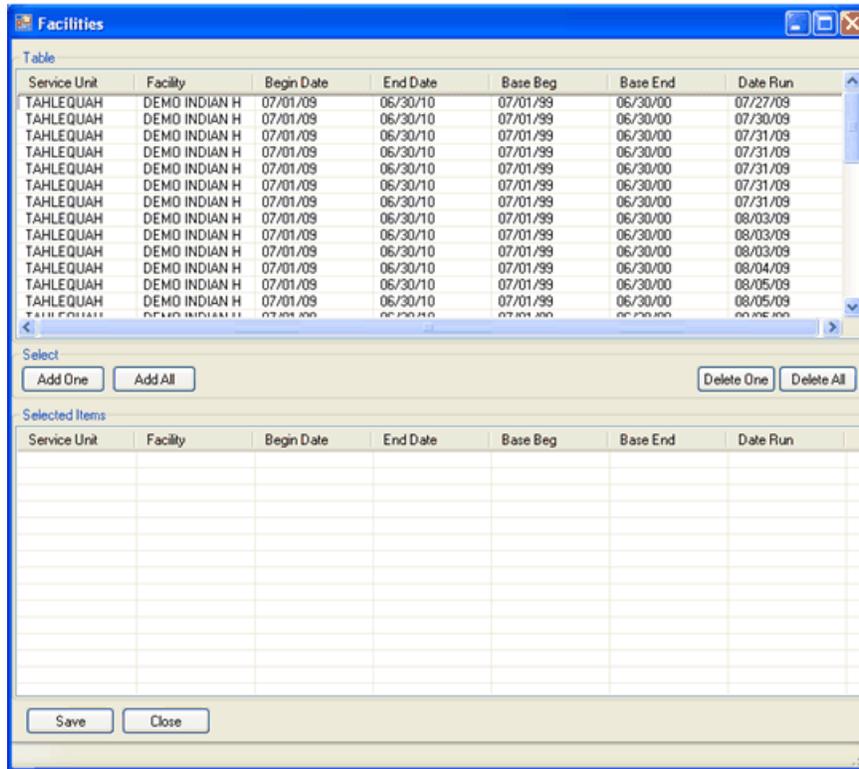


Figure 5-15: Facilities window

- To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.7 Area EO Quality Transparency Measures Report

Use this option to produce an area aggregate report on performance measures in support of Executive Order (EO) 13410 for quality transparency reporting. This report aggregates all data received to date from the facilities in your area.

The Area EO Quality Transparency Measures Report can be run in two ways: (1) using the same hard-coded report parameters (Report Period, Previous Year Period, and Baseline Year) as the National GPRA & PART Report, or (2) using custom, user-defined report parameters.

For more information, see **Section 6.2.5** in the **CRS Version 9.0 User Manual** for additional information on the Area EO Quality Transparency Measures Report.

Run the Area Executive Order Quality Transparency Measures Report

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area EO Quality Transparency Measures Report** option to display the **Area EO Quality Transparency Measures Report** window.

The screenshot shows a software window titled "Area EO Quality Transparency M...". The window contains the following fields and controls:

- Hard-coded/User-defined Report:** Two radio buttons. "Hard-coded" is selected.
- Date Range:** A dropdown menu.
- Report Year:** A dropdown menu showing "2009".
- Base Line Year:** A dropdown menu showing "2000".
- Patient Type:** A dropdown menu showing "1-Indian/Alaska Native (Classification 01)".
- Area or Facility:** Two radio buttons, "Area" is selected. A "Select" button is to the right.
- Output Type:** A dropdown menu showing "P-Microsoft Word Format".
- Run Date/Time:** A checkbox is checked. A dropdown menu shows "Friday July 10, 2009 02:23 PM".
- Buttons:** "Queue", "Close", and a help icon "?".
- Status:** "Not Queued" at the bottom left.

Figure 5-16: Area EO Quality Transparency Measures Report window

3. Under **Hard-coded/User-defined Report**, do one of the following:
 - To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in [Area EO Quality Transparency Measures Report: Hard-Coded Report Option](#).
 - To run the report using custom, user-defined parameters, select **User-defined** and follow the instructions in [Area EO Quality Transparency Measures Report: User-Defined Report Option](#).
4. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.7.1 Area EO Quality Transparency Measures Report: Hard-Coded Option

To run the Area EO Quality Transparency Measures Report with hard-coded parameters, follow these steps:

The screenshot shows a software window titled "Area EO Quality Transparency M...". At the top, it says "Hard-coded/User-defined Report". There are two radio buttons: "Hard-coded" (selected) and "User-defined". Below this are several input fields: "Date Range" (empty), "Report Year" (2009), "Base Line Year" (2000), "Patient Type" (1-Indian/Alaska Native [Classification 01]), "Area or Facility" (Area selected, Facility unselected, with a "Select" button), "Output Type" (P-Microsoft Word Format), and "Run Date/Time" (Friday, July 10, 2009 02:23 PM). At the bottom are buttons for "Queue", "Close", and "?". The status bar at the very bottom says "Not Queued".

Figure 5-17: Area EO Quality Transparency Measures Report window (Hard-coded Report option)

1. Under **Hard-coded/User-defined Report**, select **Hard-coded**.
2. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

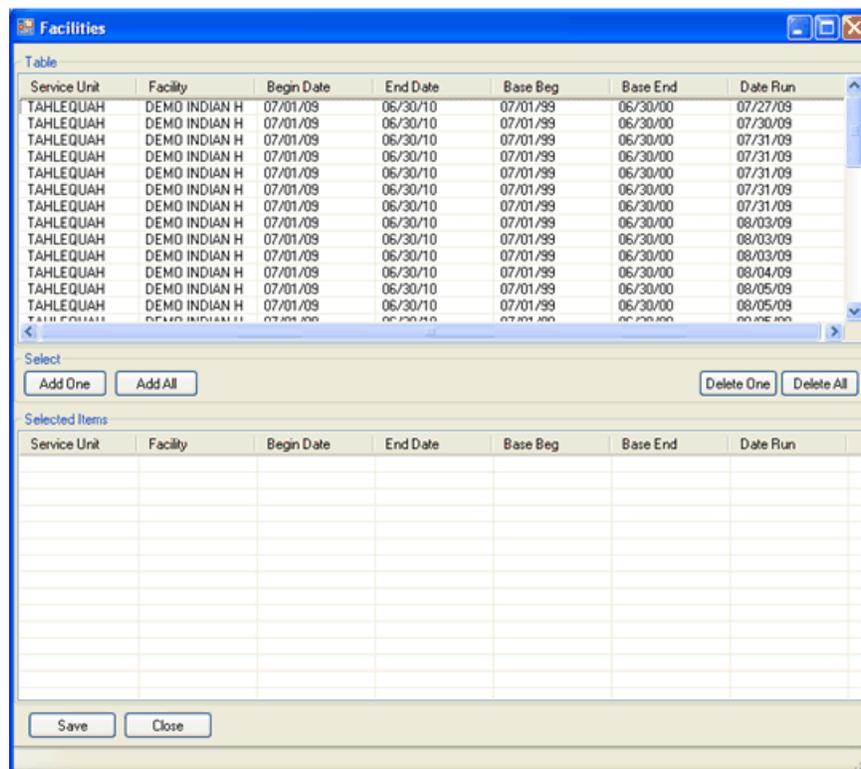


Figure 5-18: Facilities window

3. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).

- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.7.2 Area EO Quality Transparency Measures Report: User-Defined Option

To run the Area EO Quality Transparency Measures Report with user-defined parameters, follow these steps:

Figure 5-19: Area EO Quality Transparency Measures Report window (User-defined Report option)

1. Under **Hard-coded/User-defined Report**, select **User-defined**.
2. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).
3. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
4. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.
In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.
 - To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

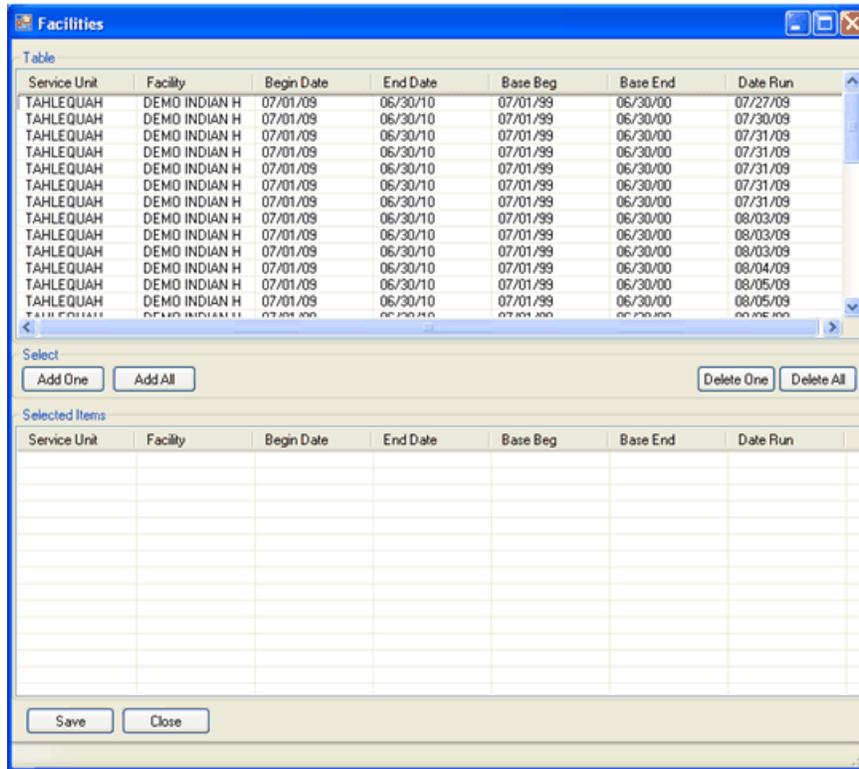


Figure 5-20: Facilities window

5. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
6. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

7. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.8 Area Elder Care Report

Use this option to produce an area aggregate Elder Care Report. This report aggregates all data received to date from the facilities in your area.

For more information, see **Section 6.2.6** in the **CRS Version 9.0 User Manual** for additional information on the Area Elder Care Report.

Run the Area Elder Care Report

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area Elder Care Report** option to display the **Area Elder Care Report** window.

The screenshot shows the 'Area Elder Care Report' dialog box. It has a blue title bar with standard window controls. The main area is light beige and contains several sections, each with a blue header and a light blue border. The 'Hard-coded/User-defined Report' section has two radio buttons: 'Hard-coded' is selected, and 'User-defined' is unselected. The 'Date Range' section has a white dropdown menu. The 'Report Year' section has a white dropdown menu with '2009' selected. The 'Base Line Year' section has a white dropdown menu with '2000' selected. The 'Patient Type' section has a white dropdown menu with '1-Indian/Alaska Native (Classification 01)' selected. The 'Area or Facility' section has two radio buttons: 'Area' is selected, and 'Facility' is unselected. There is a 'Select' button to the right. The 'Output Type' section has a white dropdown menu with 'P-Microsoft Word Format' selected. The 'Run Date/Time' section has a white dropdown menu with 'Wednesday August 19, 2009 01:41 PM' selected and a checked checkbox. At the bottom, there are three buttons: 'Queue', 'Close', and a help icon (?). Below the buttons, it says 'Not Queued'.

Figure 5-21: Area Elder Care Report window

3. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

4. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
5. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.
In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

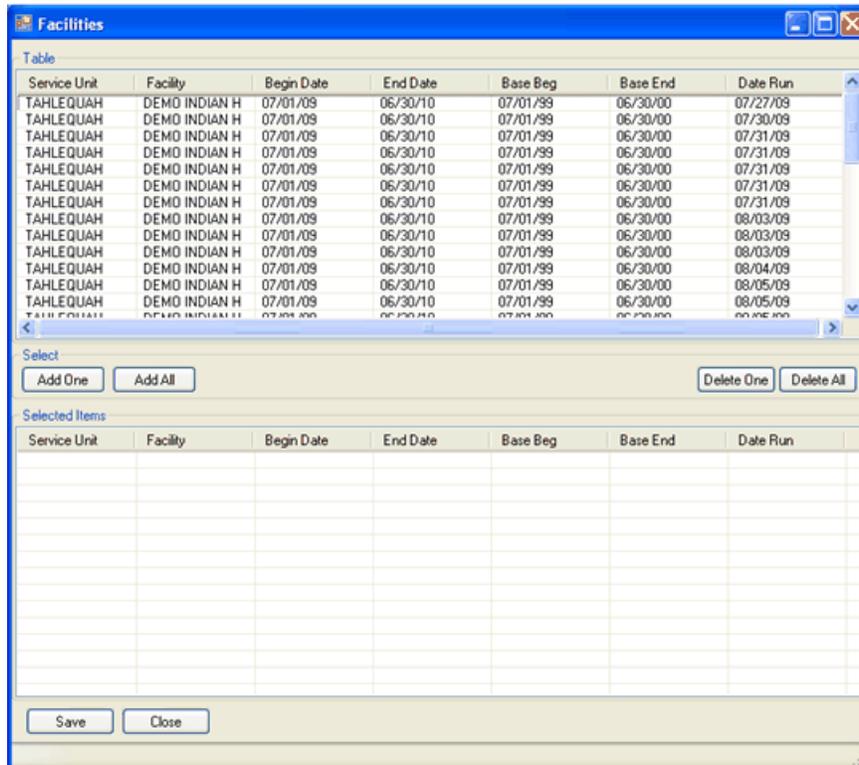


Figure 5-22: Facilities window

- To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.9 Area HEDIS Report

Use this option to produce an area aggregate HEDIS performance report. This report aggregates all data received to date from the facilities in your area.

For more information, see **Section 6.2.7** in the **CRS Version 9.0 User Manual** for additional information on the Area HEDIS Report.

Run the Area HEDIS Report

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area HEDIS Report** option to display the **Area HEDIS Report** window.

Figure 5-23: Area HEDIS Report window

3. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

4. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - **1 - Indian/Alaska Native** (Classification 01)
 - **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - **3 - All** (Both Indian/Alaska Natives and Non-01)
5. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.
 - To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

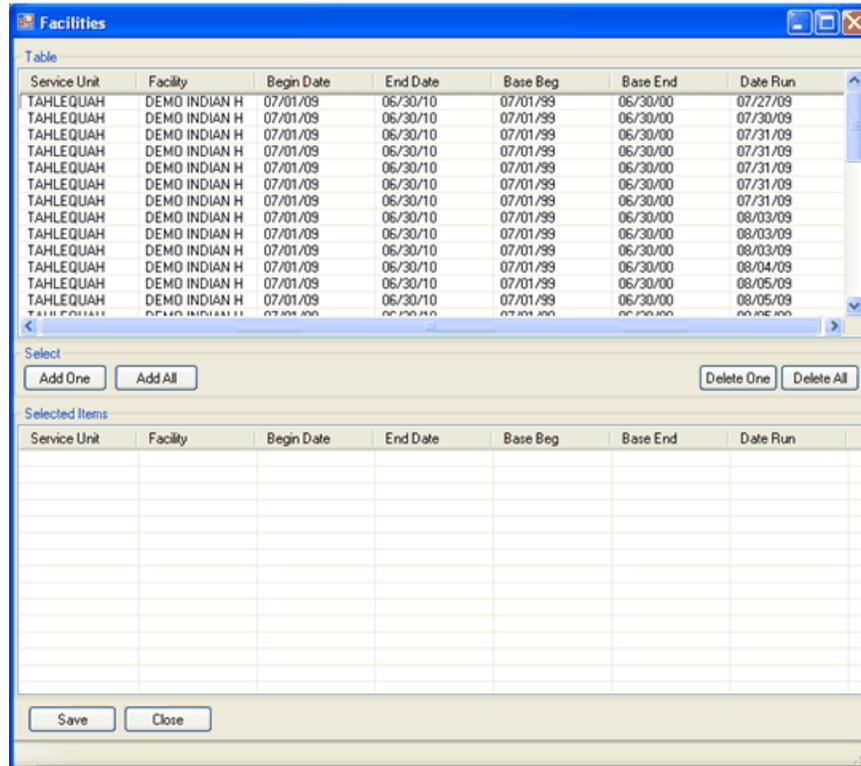


Figure 5-24: Facilities window

6. To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
7. To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.10 Area Patient Education Report w/Community Specified

Use this option to produce an area aggregate Patient Education report with Community Specified. This report aggregates all data received to date from the facilities in your area.

For more information, see **Section 6.2.8** in the **CRS Version 9.0 User Manual** for additional information on the Area Patient Education Report with Community Specified.

Run the Area Patient Education Report with Community Specified

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area Patient Education Report w/Community Specified** option to display the **Area Patient Education Report** window.

Figure 5-25: Area Patient Education Report window

3. To set the **Date Range**, **Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in [Selecting Report Dates](#).

4. In the **Patient Type** list, select one of the following beneficiary populations to report on:

- **1 - Indian/Alaska Native** (Classification 01)
- **2 - Not Indian Alaskan/Native** (Not Classification 01)
- **3 - All** (Both Indian/Alaska Natives and Non-01)

5. Under **Area or Facility**, do one of the following:

- To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

The screenshot shows a window titled "Facilities" with a table of data. The table has the following columns: Service Unit, Facility, Begin Date, End Date, Base Beg, Base End, and Date Run. The data rows are as follows:

Service Unit	Facility	Begin Date	End Date	Base Beg	Base End	Date Run
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/27/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/30/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	07/31/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/03/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/03/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/03/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/04/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/05/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/05/09
TAHLEQUAH	DEMO INDIAN H	07/01/09	06/30/10	07/01/99	06/30/00	08/05/09

Below the table, there are buttons for "Add One", "Add All", "Delete One", and "Delete All". A "Selected Items" section contains an empty table with the same column headers. At the bottom of the window are "Save" and "Close" buttons.

Figure 5-26: Facilities window

- To select the report output type and change the time and date you want the report to run, follow the instructions in [Selecting Report Output Options](#).
- To queue the report to run at the time specified under **Run Date/Time**, click **Queue** to display the **Enter Report File Name** window. Type a file name in the **Report File Name** box, and then click **OK**.

To close the window without queuing the report, click **Close**.

- To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

5.11 Area Height and Weight Data File

Use this option to produce an area aggregate file containing unduplicated height and weight data for all active clinical patients, 65 years of age and younger, who are included in a National GPRA & PART Report. This report aggregates all data received to date from the facilities in your area.

For more information, see **Section 6.2.9** in the **CRS Version 9.0 User Manual** for additional information on the Area Height and Weight Data File.

Run the Area Height and Weight Data File

1. Expand the **Area Options** folder to display the list of available area reports.
2. Click the **Area Height and Weight Data File** option to display the **Area Height and Weight Data File** window.

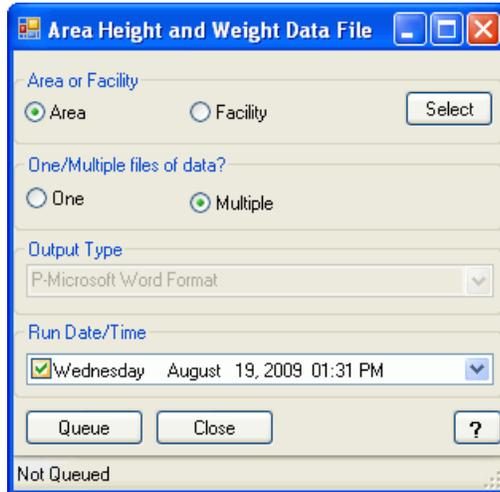


Figure 5-27: Area Height and Weight Data File window

3. Under **Area or Facility**, do one of the following:
 - To run a report that combines data from all sites within the area, select **Area**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click **Add All** to select all sites to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

- To run a report on one or more specific facilities, select **Facility**, and then click **Select** to display the **Facilities** window.

In the **Facilities** window, click one or more facilities in the **Table** list to highlight them, and then click **Add One** to add the selected facilities to the **Selected Items** list, or click **Add All** to add all facilities to the **Selected Items** list. Click **Save** to save the selected facilities and close the window, or click **Close** to close the window without saving your selection.

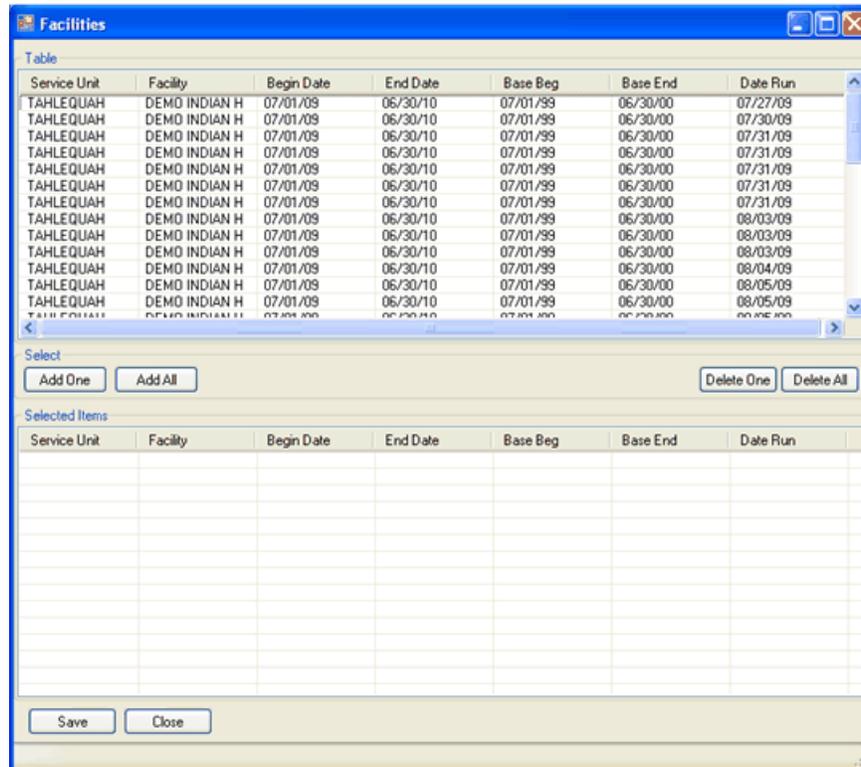


Figure 5-28: Facilities window

4. Under **One/Multiple files of data?**, do one of the following:

- To create a single data file, select **One**.

If you plan to use Microsoft Excel to review this data, use the **One** option *only* if you are certain that your file will contain fewer than 65,536 records (including the file header). Records in excess of 65,536 will not be visible in Excel.

An automated file name beginning with "CRSHW" will be assigned to the file.

- To create multiple files, select **Multiple**. Each file will contain a maximum of 65,536 records including the file header.

The last ten characters of each automated file name will specify the number of the file and the total number of files created (e.g., 001_of_100).

If you select this option and the number of records, including the file header, is less than or equal to 65,536, all records will be written to a single file.

5. To run the report right away, skip to Step 6.

To queue the report to run at a different date and/or time, follow these steps:

- a. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
 - b. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
6. Click **Queue** to display the **Enter Report File Name** window.
 7. Type a file name for the report in the **Report File Name** box, and then click **OK**.

The **Enter Report File Name** window and the report definition window both disappear while the report runs.

8. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

6.0 Basic Operations in Visual CRS 2009

This section provides instructions for using each of the supplemental windows opened by Visual CRS in the process of selecting report options, such as the **Clinic** window and the **Search Template** window, and for specifying report dates and report output options.

6.1 Creating or Selecting a Demo/Test Patient Search Template

The demo/test patient search template contains the names of all "demo" and "test" patients in a site's database and is used to exclude these patients from all CRS reports. Use the [Update the Demo/Test Patient Search Template](#) option to create a new demo/test patient search template or update an existing template.

The **Search Templates** window allows you to select an existing template to update, or to specify the name of a new template to add patients to.

Note: To select the demo/test patient search template used to exclude "demo" and "test" patients in a site's database from all CRS reports, use the [Site Parameters](#) option.

For more information, see **Section 5.7** in the **CRS Version 9.0 User Manual** for more information about creating search templates.

Create a new demo/test patient search template or select an existing template

To create a new demo/test patient search template or select an existing template to update, follow these steps.

1. In the **Demo Search Template** window, click **Select** next to the **Search Template** box to display the **Search Templates** window.

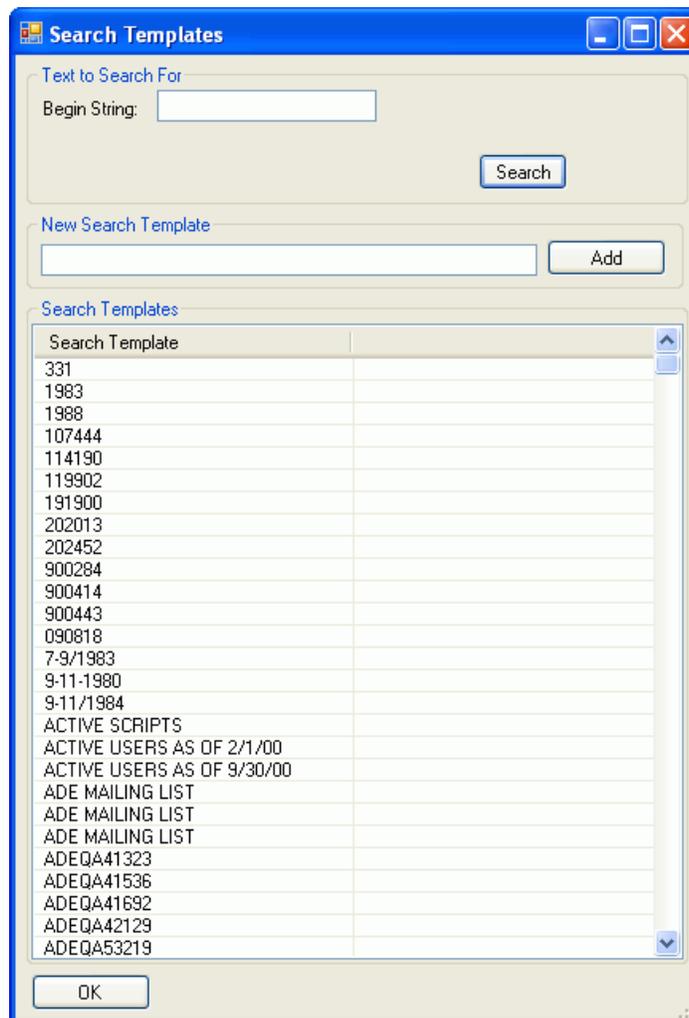


Figure 6-1: Search Templates window

The available search templates appear in the **Search Templates** list.

- To create a new demo/test patient search template, go to Step 2.
- To select an existing template to update, go to Step 3.

2. To create a new demo/test patient search template, follow these steps:
 - a. Type the name of the new template in **New Search Template** and click **Add**.
 - b. Click **Yes** in the **Add?** message box to return to the **Demo Search Template** window.

The name of the search template you created is displayed in the **Search Template** box.

3. To select an existing demo/test search template to update, follow these steps:
 - a. To locate a search template, do one of the following:
 - Scroll through the list to locate the template you want to use.
 - To locate search templates beginning with a specific letter or letters, type the letters in the **Begin String** box, and then click **Search**.
 - b. Click the search template you want to update to highlight it in blue, and then click **OK** to return to the **Demo Search Template** window.

The name of the search template you selected is displayed in the **Search Template** box.

6.2 Filtering Lists

Some CRS report options allow you to select clinics, hospitals, or providers to be included in the report, and the Site Parameters option allows you to select a home location. Because the lists of clinics, providers, hospitals, and locations in the CRS system can be very large, the selection windows for these items include a way to filter the lists to make it easier to locate the specific item you want to include.

Filter a list of clinics, hospitals, providers, or locations

In these selection windows, the list of available items in the left pane of the window is blank when the window is first opened.

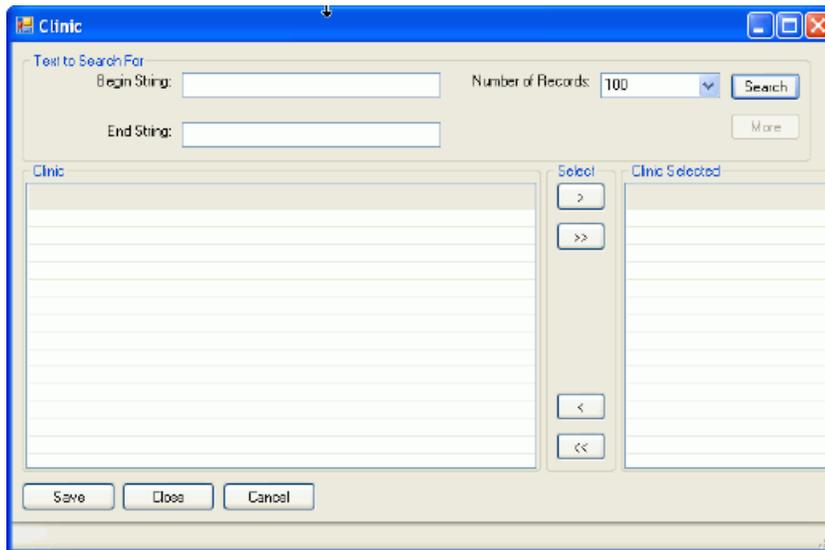


Figure 6-2: Text boxes for filtering lists

To filter the list, follow these steps:

1. Use one of the filtering options below.
2. Select the number of items to display at one time from the **Number of Records** list.
3. Click Search.
4. To view additional items with the same criteria, click **More**. (If all items with the specified criteria are already displayed in the list in the left pane, the **More** button is unavailable.)

Filtering options

- To display all the items in the list, leave both the **Begin String** and the **End String** boxes blank.

Note: The entire list of clinics or providers may be very long.

- Use the **Begin String** and **End String** boxes to filter the list.
 - To display all items beginning with a specific letter or letters, type those letters in the **Begin String** box.

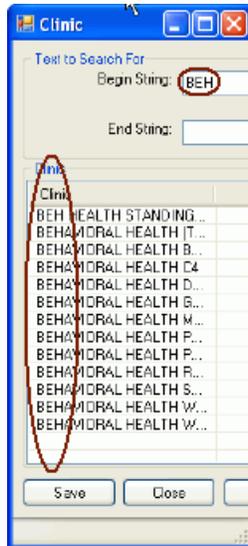


Figure 6-3: Displaying items beginning with a string

- To display all items whose names begin with a range of letters, type the letters *at the beginning of the range* in the **Begin String** box, and then type the letters that fall *after the end of the range* in the **End String** box.

Letters in the **Begin String** box will be *included* in the filtered list, while letters in the **End String** box will be *excluded* from the list.

Examples:

To display clinics whose names begin with *E*, *F*, or *G*, type **E** in the **Begin String** box, and type **H** in the **End String** box.

If you type **FA** in the **Begin String** box and **GP** in the **End String** box, the filtered list will include all clinics whose names begin with letters that fall between *FA* (included) and *GP* (excluded).

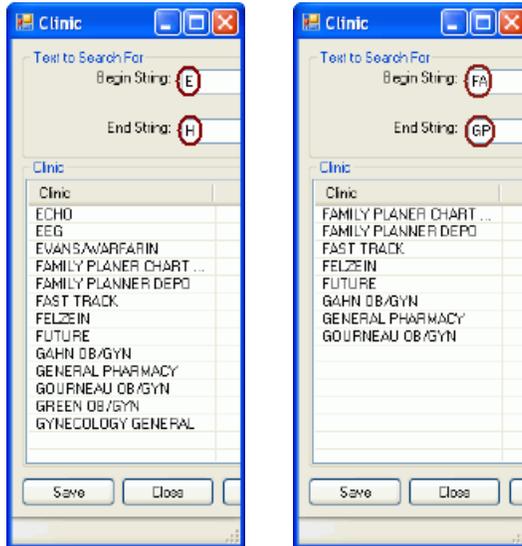


Figure 6-4: Displaying items between a beginning string and an ending string

6.3 Selecting a Community Taxonomy

Many CRS reports allow you to select a community taxonomy. A community taxonomy defines the range of communities where a facility's patients reside and identifies the population being reported on. Use the [Site Parameters](#) option to specify the default community taxonomy that your site is most likely to use.

Community taxonomies are created in Q-Man. If you do not have access to Q-Man, see your RPMS site manager.

For more information:

See **Section 4.1** in the **CRS Version 9.0 User Manual** for more information about community taxonomies and using Q-Man to define them.

Select a community taxonomy

The community taxonomy that will be used for a report is displayed in the **Community Taxonomy** box in the report definition window.

1. To select a different community taxonomy for the report, click **Select** next to the **Community Taxonomy** box to display the **Taxonomies** window.

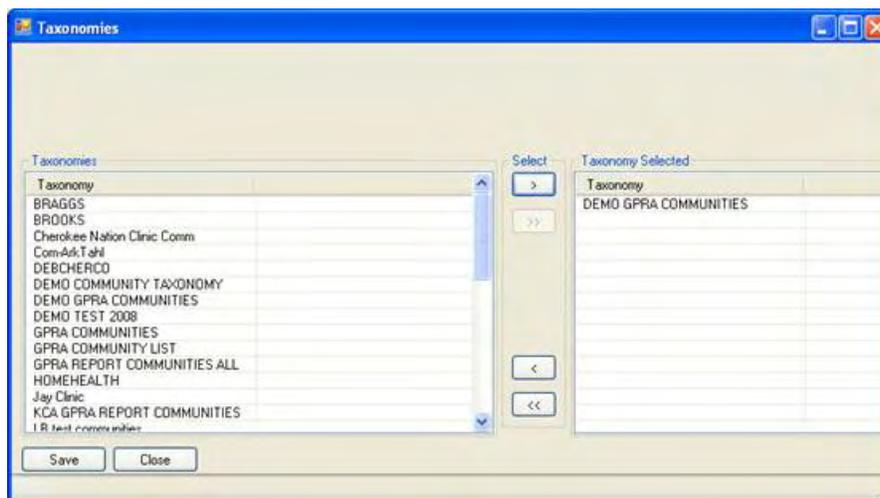


Figure 6-5: Taxonomies window

The available taxonomies appear in the **Taxonomies** list (the left pane). If a taxonomy has been selected, it will appear in the **Taxonomy Selected** list (the right pane) after you complete Step 2.

Note:

Although multiple taxonomies can appear simultaneously in the **Taxonomies Selected** pane, a report can be run using only one taxonomy at a time.

2. Scroll through the list in the **Taxonomies** pane to locate the taxonomy you want to use. Click the taxonomy to highlight it, and then click > to move it to the **Taxonomy Selected** pane.

To remove a taxonomy from the **Taxonomy Selected** pane, click the taxonomy to highlight it, and then click < to move it back to the **Taxonomies** list.

3. When you have selected the correct community taxonomy for the report, click **Save** to close the window and save the taxonomy selection.

To close the **Taxonomies** window without saving your selection, click **Close**.

6.4 Selecting a Hospital

The CMS Performance Report allows you to specify a hospital whose patients will be included in the report.

Select a hospital

If no hospital has been selected for a report, the **Hospital Name** box in the **CMS Performance Report** window is empty. If a hospital has been selected, the name is displayed in the **Hospital Name** box.

1. To select a hospital for the report, click **Select** next to the **Hospital Name** box to display the **Hospital Name** window.

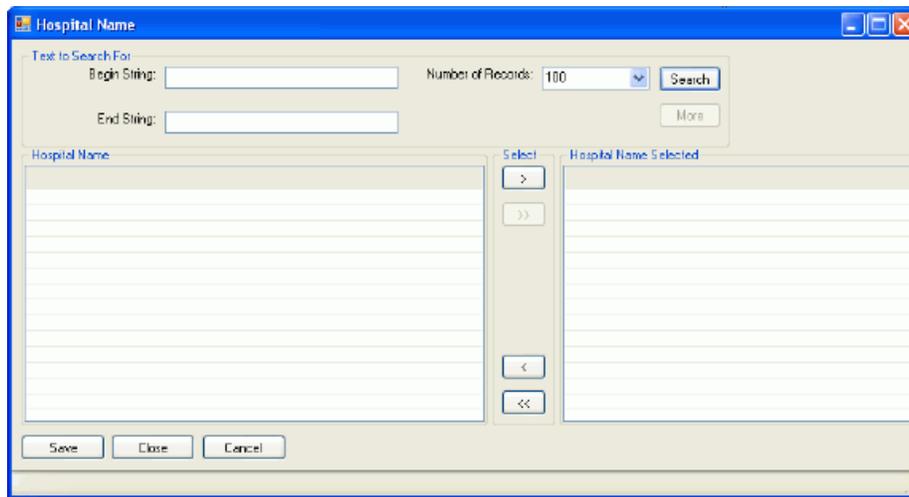


Figure 6-6: Hospital Name window

Available hospitals will appear in the **Hospital Name** list (the left pane) after you complete Step 2. If a hospital has been selected, it will appear in the **Hospital Name Selected** list (the right pane) after you complete Step 3.

Note: Although multiple hospitals can appear simultaneously in the **Hospital Name Selected** pane, the CMS Performance Report can be run for only one hospital at a time.

2. To locate a specific hospital, follow the steps below.
 - a. To display a list of hospitals, do one of the following
 - To display the entire list of hospitals, leave both the **Begin String** and the **End String** boxes blank.

Note: The entire list of hospitals may be very long.

- To display a filtered list of hospitals, follow the instructions in [Filtering Lists](#).
- b. In the **Number of Records** list, select the number of hospitals to display at one time.
 - c. Click **Search**.
 - d. To view additional hospitals with the same criteria, click **More**. (If all hospitals with the specified criteria are already displayed in the **Hospital Name** list, the **More** button is unavailable.)
3. Scroll through the **Hospital Name** list to locate the hospital you want to use. Click the hospital to highlight it, and then click > to move it to the **Hospital Name Selected** list.

To remove a hospital from the **Hospital Name Selected** list, click the hospital to highlight it, and then click < to move it back to the **Hospital Name** list.

4. When you have selected the correct hospital for the report, click **Save** to close the window and save the hospital selection.

To close the **Hospital name** window without saving your selection, click **Close**.

6.5 Selecting a Location

The **Site Parameters** option allows you to select the location that you are setting site parameters for, or to specify the location that will be used as your site's Home location.

Select a location

- To select a location, click **Select Location** next to the **Location** box or the **Site's Demo Patient Search Template** box to display the **Locations** window.

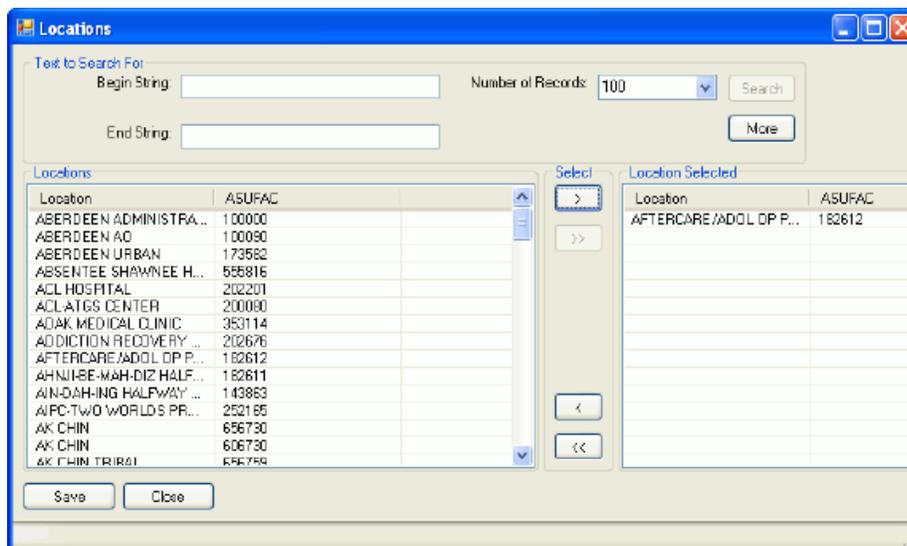


Figure 6-7: Locations window

Available locations will appear in the **Locations** list (the left pane) after you complete Step 2. If a location has been selected, it will appear in the **Location Selected** list (the right pane) after you complete Step 3.

Note: Although multiple locations can appear simultaneously in the **Location Selected** pane, only one location can be selected as the site's Home location.

2. To locate a specific location, follow the steps below.
 - a. To display a list of locations, do one of the following
 - To display the entire list of locations, leave both the **Begin String** and the **End String** boxes blank.

Note: The entire list of locations may be very long.

- To display a filtered list of locations, follow the instructions in [Filtering Lists](#).
- b. In the **Number of Records** list, select the number of locations to display at one time.
 - c. Click **Search**.
 - d. To view additional locations with the same criteria, click **More**. (If all locations with the specified criteria are already displayed in the **Locations** list, the **More** button is unavailable.)
3. Scroll through the **Locations** list to locate the location you want to use. Click the location to highlight it, and then click > to move it to the **Location Selected** list.

To remove a location from the **Location Selected** list, click the location to highlight it, and then click < to move it back to the **Locations** list.

4. When you have selected the correct location for your site's Home location, click **Save** to close the window and save the location selection.

To close the **Locations** window without saving your selection, click **Close**.

6.6 Selecting a Provider

Some CRS reports allow you to specify a provider whose patients will be included in the report.

Select a provider

If no provider has been selected for a report, the **Provider** box in the report definition window is empty. If a provider has been selected, the name is displayed in the **Provider** box.

1. To select a provider for the report, click **Select** next to the **Provider** box to display the **Provider** window.

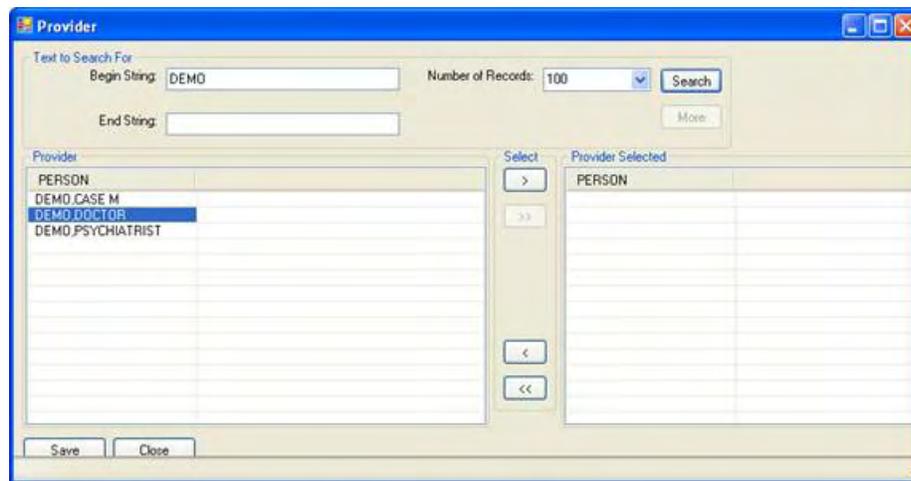


Figure 6-8: Provider window

Available providers will appear in the **Provider** list (the left pane) after you complete Step 2. If a provider has been selected, it will appear in the **Provider Selected** list (the right pane) after you complete Step 3.

Note: Although multiple providers can appear simultaneously in the **Provider Selected** pane, a report can be run for only one provider at a time.

2. To locate a specific provider, follow the steps below.
 - a. To display a list of providers, do one of the following
 - To display the entire list of providers, leave both the **Begin String** and the **End String** boxes blank.

Note: The entire list of providers may be very long.

- To display a filtered list of providers, follow the instructions in [Filtering Lists](#).
- b. In the **Number of Records** list, select the number of providers to display at one time.
 - c. Click **Search**.
 - d. To view additional providers with the same criteria, click **More**. (If all providers with the specified criteria are already displayed in the **Provider** list, the **More** button is unavailable.)
3. Scroll through the **Provider** list to locate the provider you want to use. Click the provider to highlight it, and then click > to move it to the **Provider Selected** list.

To remove a provider from the **Provider Selected** list, click the provider to highlight it, and then click < to move it back to the **Provider** list.

4. When you have selected the correct provider for the report, click **Save** to close the window and save the provider selection.

To close the **Provider** window without saving your selection, click **Close**.

6.7 Selecting a Search Template

Some CRS reports allow you to select a search template. Search templates are created in CRS using the **Create Search Template for National Patient List** option or in other RPMS applications, such as QMan and the Search Template System.

Note: The Selected Measures w/Patient Panel Population report uses a different window to select search templates. See [Selected Measures w/Patient Panel Population](#) and [Selecting a Search Template \(Selected Measures w/Patient Panel Population Report\)](#) for more information.

For more information, see **Section 5.7** in the **CRS Version 9.0 User Manual** for more information about creating search templates.

Select a search template

1. To select a search template for a report, click **Select** next to the **Select Search Template** box to display the **Search Template** window.

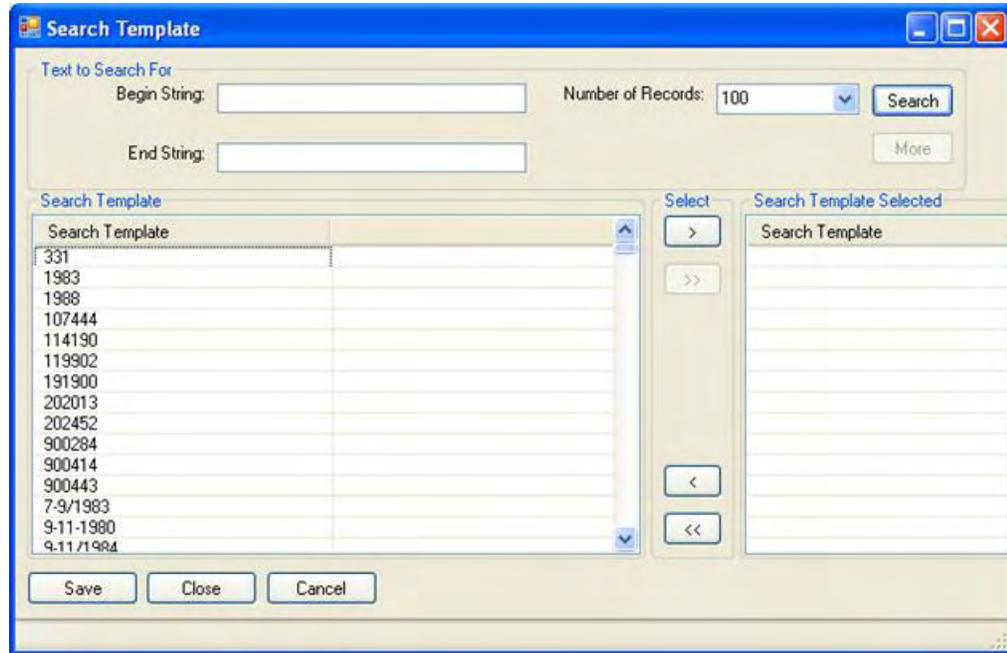


Figure 6-9: Search Template window

The available search templates appear in the **Search Template** list (the left pane). If a search template has been selected, it will appear in the **Search Template Selected** list (the right pane) after you complete Step 2.

Note: Although multiple search templates can appear simultaneously in the **Search Template Selected** pane, a report can be run for only one search template at a time.

2. Scroll through the list in the **Search Template** pane to locate the template you want to use. Click the search template to highlight it, and then click > to move it to the **Search Template Selected** pane.

To remove a template from the **Search Template Selected** pane, click the template to highlight it, and then click < to move it back to the **Search Template** list.

3. When you have selected the correct search template for the report, click **Save** to close the window and save the search template selection.

To close the **Search Template** window without saving your selection, click **Close**.

6.8 Selecting a Search Template (Selected Measures w/Patient Panel Population Report)

The **Selected Measures w/Patient Panel Population** report option allows you to select a search template. Search templates are created in CRS using the **Create Search Template for National Patient List** option or in other RPMS applications, such as QMan and the Search Template System.

Note: Other CRS reports use a different window to select search templates. See **GPRA & PART Forecast Patient List**, [Patient Education w/Patient Panel Population](#), and [Selecting a Search Template](#) for more information.

For more information, see **Section 5.7** in the **CRS Version 9.0 User Manual** for more information about creating search templates.

Select a search template

1. To select a search template, click **Select** next to the **Search Template** box to display the **Search Template** window.

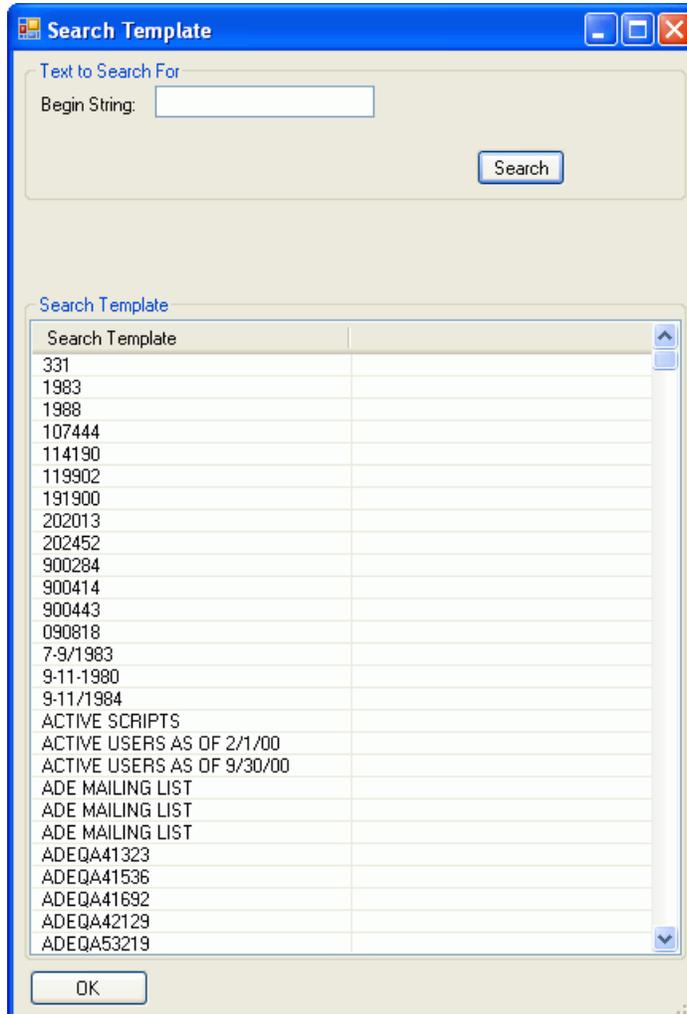


Figure 6-10: Search Template window

The available search templates appear in the **Search Template** list.

2. To locate a search template, do one of the following:
 - Scroll through the list to locate the template you want to use.
 - To locate search templates beginning with a specific letter or letters, type the letters in the **Begin String** box, and then click **Search**.

3. Click the search template you want to update to highlight it in blue, and then click **OK** to return to the report definition window.

The name of the search template you selected is displayed in the **Search Template** box.

6.9 Selecting a Site's Demo/Test Patient Search Template

The demo/test patient search template contains the names of all "demo" and "test" patients in a site's database and is used to exclude these patients from all CRS reports. Use the [Site Parameters](#) option to specify the demo/test patient search template that CRS will use to run a site's reports.

The **Search Templates** window allows you to select a demo/test patient search template from a list of templates.

Note: To create a new demo/test patient search template or update an existing one, use the [Update the Demo/Test Patient Search Template](#) option.

For more information, see **Section 5.7** in the **CRS Version 9.0 User Manual** for more information about creating search templates.

Select a site's demo/test patient search template

To select the demo/test patient search template used by CRS to exclude "demo" and "test" patients from a site's reports, follow these steps:

1. In the **CRS Site Parameters** window, click **Select Template** next to the **Site's Demo Patient Search Template** box to display the **Search Templates** window.

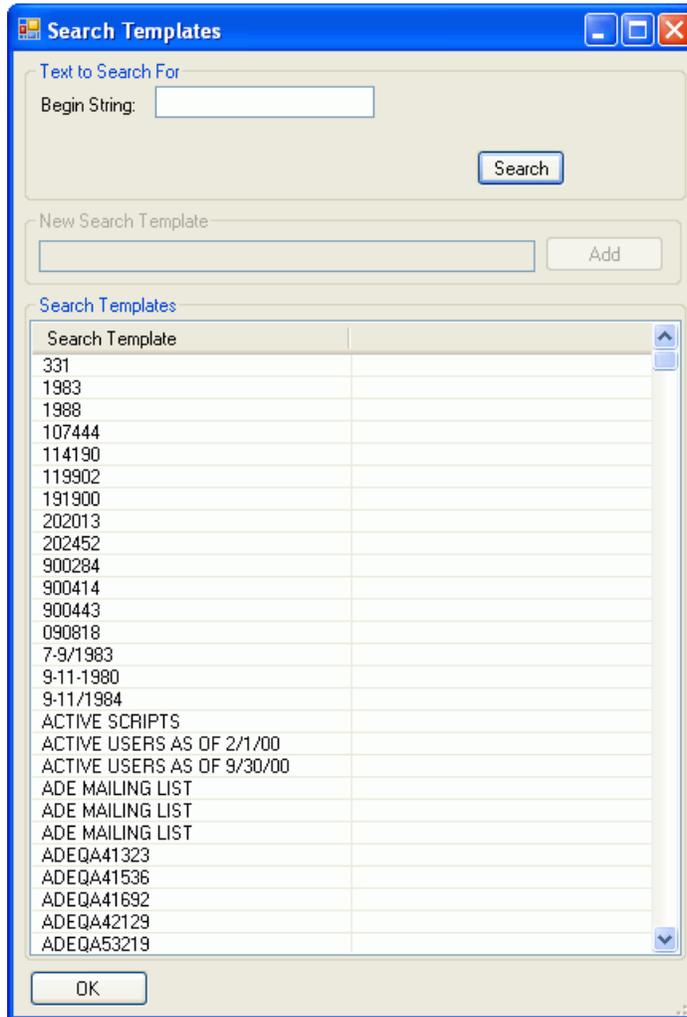


Figure 6-11: Search Templates window

The available search templates appear in the **Search Templates** list.

2. To locate a search template, do one of the following:
 - Scroll through the list to locate the template you want to use.
 - To locate search templates beginning with a specific character or characters, type the characters in the **Begin String** box, and then click **Search**.

- Click the search template you want to update to highlight it in blue, and then click **OK** to return to the **Site Parameters** window.

The name of the search template you selected is displayed in the **Site's Demo Patient Search Template** box.

6.10 Selecting Clinics

Some CRS reports allow you to specify a clinic whose patients will be included in the report.

Select clinics

If no clinics have been selected for a report, the **Select Clinic** box in the report definition window reads "No Items Selected". If one or more clinics have been selected, the words "Items Selected" are displayed in the **Select Clinic** box.

- To select one or more clinics for the report, click **Select** next to the **Select Clinic** box to display the **Clinic** window.

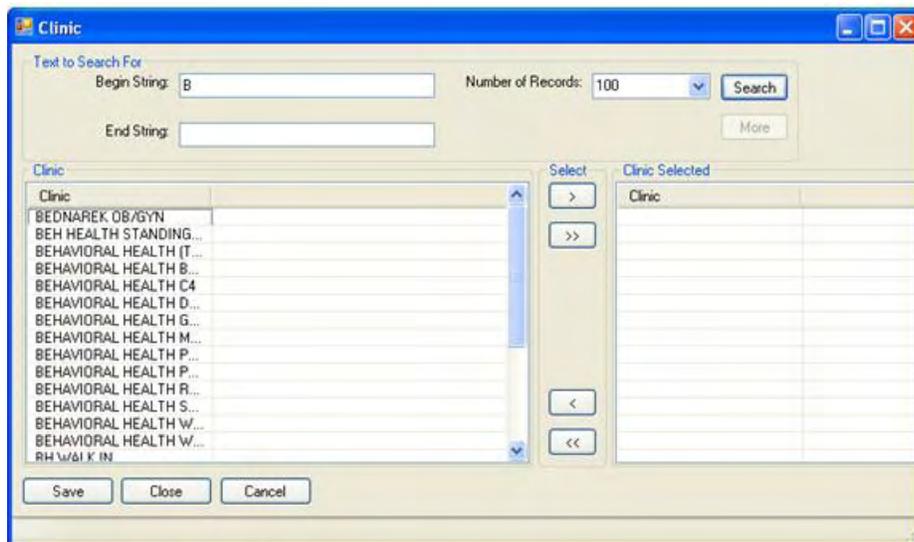


Figure 6-12: Clinic window

Available clinics will appear in the **Clinic** list (the left pane) after you complete Step 2. If one or more clinics have been selected, they will appear in the **Clinic Selected** list (the right pane) after you complete Step 3.

2. To locate a specific clinic, follow the steps below.
 - a. To display a list of clinics, do one of the following
 - To display the entire list of clinics, leave both the **Begin String** and the **End String** boxes blank.
- Note:** The entire list of clinics may be very long.
- To display a filtered list of clinics, follow the instructions in [Filtering Lists](#).
 - b. In the **Number of Records** list, select the number of clinics to display at one time.
 - c. Click **Search**.
 - d. To view additional clinics with the same criteria, click **More**. (If all clinics with the specified criteria are already displayed in the **Clinic** list, the **More** button is unavailable.)
3. To select clinics, scroll through the **Clinic** list to locate the clinic or clinics you want to use. Click a clinic to highlight it, and then click > to move it to the **Clinic Selected** list.
 - To highlight multiple clinics, hold down the SHIFT key to select contiguous clinics, or hold down the CTRL key to select noncontiguous clinics. Click > to move the highlighted clinics to the **Clinic Selected** list.

To move all clinics in the **Clinic** list to the **Clinic Selected** list, click >>.
 - To remove a clinic from the **Clinic Selected** pane, click the measure to highlight it, and then click < to move it back to the **Clinic** list.

To remove all clinics from the **Clinic Selected** list, click <<.
 4. When you have selected all the clinics you want to include in the report, click **Save** to close the window and save the clinic selection.

To close the **Clinic** window without saving your selection, click **Close** or **Cancel**.

6.11 Selecting Measures and Patient Lists

Some CRS report options require you to select one or more performance measures to be reported on, and then to select one or more patient list or submeasure for each selected measure. The measures available vary depending on the specific report or patient list being run.

This procedure applies to report options with a **Select Measure(s)** button at the top of the report definition window, as shown below.



Figure 6-13: Select Measure(s) button

Note: For instructions on selecting performance measures and patient lists for reports with different options, see [Selecting Performance Measures](#) and [Selecting Patient Lists](#).

Select measures and patient lists

1. Click **Select Measure(s)** at the top of the report definition window to display the **Measures** window.

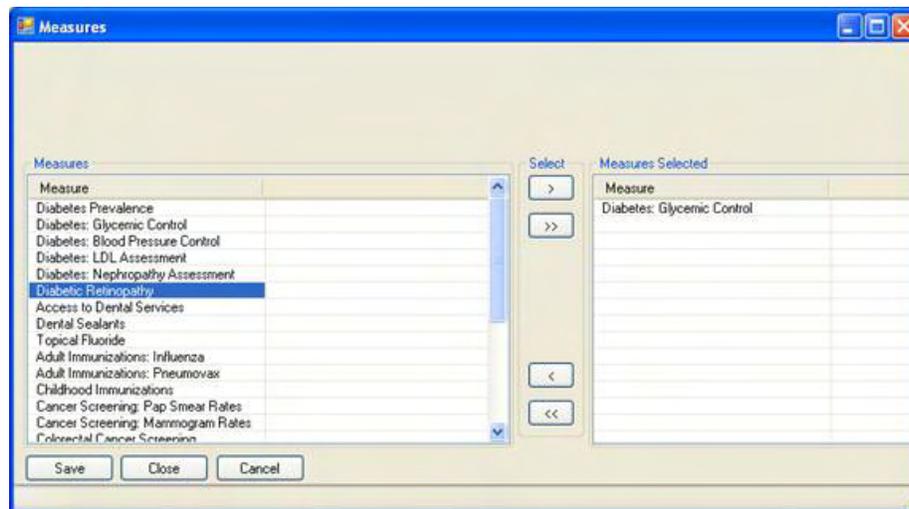


Figure 6-14: Measures window

Available performance measures appear in the **Measures** list (the left pane). If measures have been selected, they will appear in the **Measures Selected** list (the right pane) after you complete Step 2.

2. To select performance measures, scroll through the **Measures** list to locate the measure or measures you want to use. Click a measure to highlight it, and then click > to move it to the **Measures Selected** list.
 - To highlight multiple measures, hold down the SHIFT key to select contiguous measures, or hold down the CTRL key to select noncontiguous measures. Click > to move the highlighted measures to the **Measures Selected** list.

To move all measures in the **Measures** list to the **Measures Selected** list, click >>.
 - To remove a measure from the **Measures Selected** pane, click the measure to highlight it, and then click < to move it back to the **Measures** list.

To remove all measures from the **Measures Selected** list, click <<.

Note: Although multiple performance measures can appear simultaneously in the **Measures Selected** list, some reports can be run for only one performance measure at a time.

3. When you have selected the measures to include in the report, do one of the following:
 - To save the selected measures, close the window, and display the **Sub-Measures** message box, click **Save**.



Figure 6-15: Sub-Measures message box

- To close the **Measures** window without saving your selection, click **Close** or **Cancel**.

4. Click **OK** to display a window listing patient lists for the first performance measure selected.

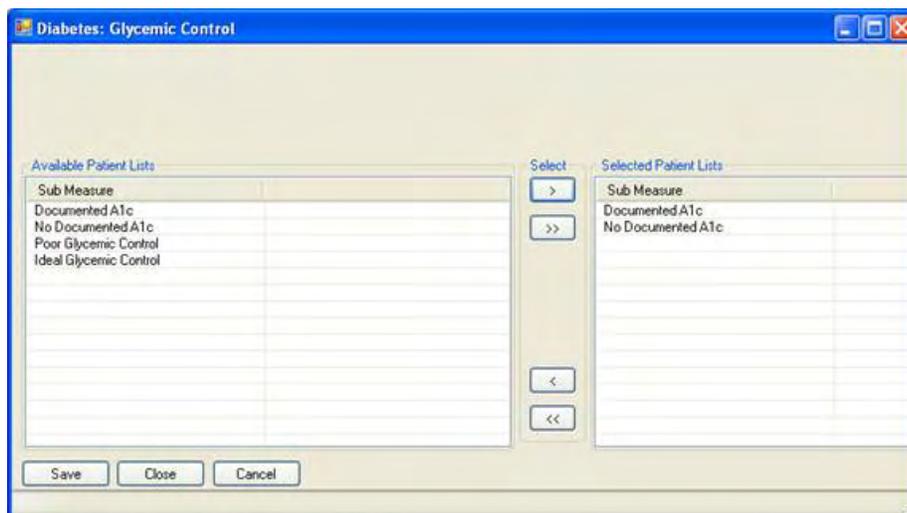


Figure 6-16: Patient List window

Available patient lists appear in the **Available Patient Lists** list (the left pane). If patient lists have been selected, they will appear in the **Selected Patient Lists** list (the right pane).

5. In the patient list window, do one of the following:
 - To select patient lists, follow the instructions in [Step 2](#) above. To close the window and save the selected patient lists, click **Save**.
If you selected more than one performance measure in Step 2, clicking **Save** will close the current window and open a new patient list window for each measure. When you have selected patient lists for each measure, clicking **Save** will close the last patient list window and return to the report definition window.
 - To close a patient list window without selecting patient lists, click **Close**. Patient lists selected in this window will not be saved.
If you selected more than one performance measure in Step 2, clicking **Close** will close the current window and open a new patient list window for each measure. When you have selected patient lists for each measure, clicking **Close** will close the last patient list window and return to the report definition window.
 - To stop selecting patient lists and return to the report definition window, click **Cancel**. Patient lists selected in this window will not be saved.

6.12 Selecting Multiple Patients

Some CRS reports allow you to select multiple patients to report on.

Select multiple patients

- To select patients for a report, click **Select** next to the **Select Patient(s)** box to display the **Multiple Patient Select** window.

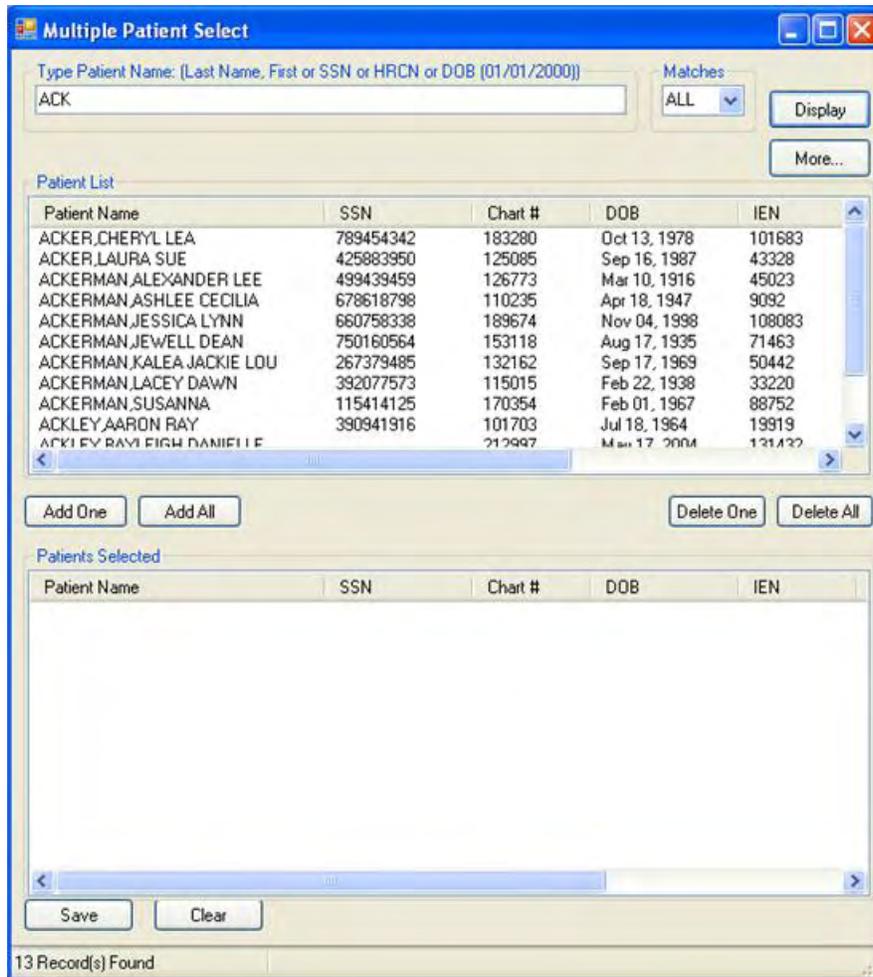


Figure 6-17: Multiple Patient Select window

Available patients will appear in the **Patient List** pane (the top pane) after you complete Step 3. If patients have been selected, they will appear in the **Patients Selected** list (the bottom pane) after you complete Step 4.

2. To locate specific patients, follow these steps:
 - a. Type all or part of a patient name (last name, then first name), social security number, HRCN, or date of birth in the format MM/DD/YYYY, in the **Type Patient Name** box.
 - b. Select the number of matches to display in the **Matches** list
 - c. Click **Display** to display a list of names matching the criteria you entered in the **Patient List** pane.
 - d. To clear the list of names and locate different patients, do one of the following:
 - Type other information in the **Type Patient Name** box.
 - Click **Clear** and then type other information in the **Type Patient Name** box.
3. To select patients to report on, do one of the following:
 - Click one or more patient names in the **Patient List** pane to highlight them, and then click **Add One** to add the names to the **Patients Selected** list.
 - To highlight multiple patient names, hold down the SHIFT key to select contiguous names, or hold down the CTRL key to select noncontiguous names. Click **Add One** to move the highlighted names to the **Patients Selected** list.

To move all patients in the **Patient List** pane to the **Patients Selected** list, click **Add All**.
 - To remove a name from the **Patients Selected** pane, click the name to highlight it, and then click **Delete One** to move it back to the **Patient List** pane.

To remove all names from the **Patients Selected** list, click **Delete All**.
4. When you have selected all the patients that you want to include in the report, click **Save** to close the window and save the clinic selection.

To close the **Multiple Patient Select** window without saving your selection, click  at the top right corner of the window.

6.13 Selecting Patient Lists

Some CRS report options allow you to select one or more patient lists for the performance measures being reported on. The patient lists available vary depending on the specific performance measures being used.

This procedure applies to reports with a button allowing you to include patient lists and a **Select Measures** button in the report definition window, as shown below.

A screenshot of a software interface for report definition. At the top right is a 'Select' button. Below it is a section titled 'Do you want Patient Lists?' with two radio buttons: 'Yes' (which is selected and circled in red) and 'No'. To the right of these buttons is a 'Select Measures' button. Below this section is a 'List Type' dropdown menu currently showing 'R-Random Patient List'. A 'Provider' label is partially visible at the bottom left.

Figure 6-18: Patient list options with Select Measures button

The **Do you want Patient List** option buttons and **Select Measures** button are only active if you have already selected performance measures. See [Selecting Performance Measures](#) for instructions.

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **Do you want Patient Lists?** will be inactive for users without this security key.

For instructions on selecting performance measures and patient lists for reports with different options, see [Selecting Measures and Patient Lists](#).

1. Click **Yes** under **Do you want Patient Lists?**, and then click **Select Measures** to display the **Patient List Measures** window.

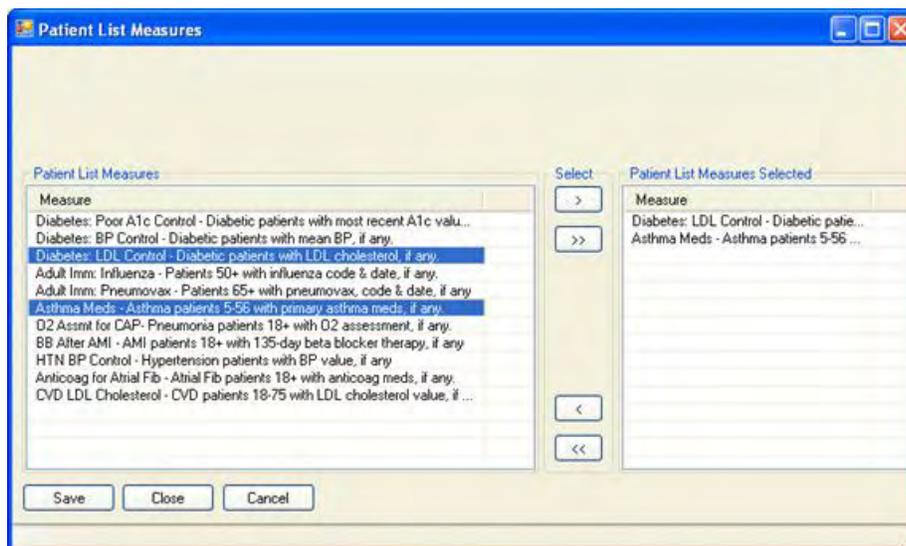


Figure 6-19: Patient List Measures window

Available patient lists appear in the **Patient List Measures** list (the left pane). If patient lists have been selected, they will appear in the **Patient List Measures Selected** list (the right pane) after you complete Step 2.

2. To select patient lists, locate the measure or measures you want to use in the **Patient List Measures** list. Click a measure to highlight it, and then click > to move it to the **Patient List Measures Selected** list.
 - To highlight multiple measures, hold down the SHIFT key to select contiguous measures, or hold down the CTRL key to select noncontiguous measures. Click > to move the highlighted measures to the **Patient List Measures Selected** list.

To move all measures in the **Patient List Measures** list to the **Patient List Measures Selected** list, click >>.
 - To remove a measure from the **Patient List Measures Selected** pane, click the measure to highlight it, and then click < to move it back to the **Patient List Measures** list.

To remove all measures from the **Patient List Measures Selected** list, click <<.

- When you have selected the measures to include in the report, click **Save** to close the window and save the selected measures.

To close the **Patient List Measures** window without saving your selection, click **Close** or **Cancel**.

6.14 Selecting Performance Measures

Some CRS report options allow you to select one or more performance measures to be reported on. The measures available vary depending on the specific report or patient list being run.

This procedure applies to reports with the following options in the report definition window:

- A button allowing you to use selected measures and a **Select** button, as shown below

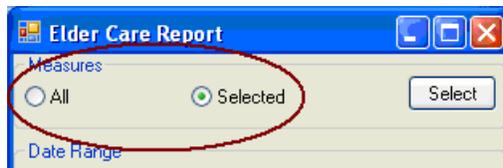


Figure 6-20: Measures options and Select button

- A drop-down list with the **Selected Measures (User Defined)** option and a **Select** button, as shown below

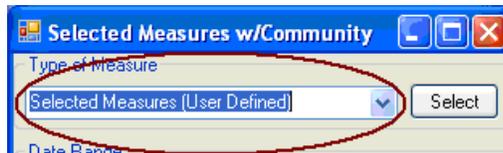


Figure 6-21: Selected Measures (User Defined) option and Select button

Some report options also allow you to select one or more patient lists or submeasures for each selected performance measure. See [Selecting Patient Lists](#) for instructions.

Note: For instructions on selecting performance measures and patient lists for reports with different options, see [Selecting Measures and Patient Lists](#).

Select Performance Measures

1. Click **Select** next to the **Selected** option button under **Measures**, or next to **Selected Measures (User Defined)** in the **Type of Measure** drop-down list, to display the **Measures** window.

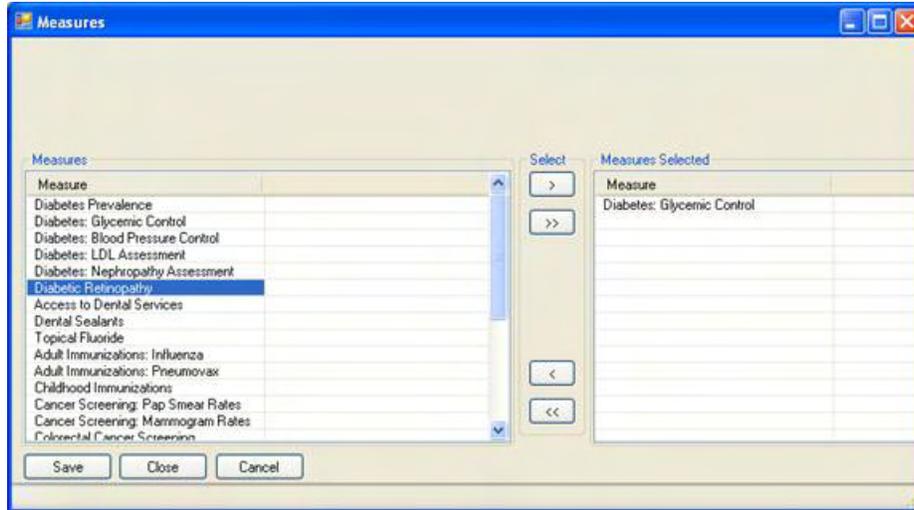


Figure 6-22: Measures window

Available measures will appear in the **Measures** list (the left pane). If measures have been selected, they will appear in the **Measures Selected** list (the right pane) after you complete Step 2.

2. To select a performance measure, scroll through the **Measures** list to locate the measures you want to use. Click a measure to highlight it, and then click > to move it to the **Measures Selected** pane.
 - To highlight multiple measures, hold down the SHIFT key to select contiguous measures, or hold down the CTRL key to select noncontiguous measures. Click > to move the highlighted measures to the **Measures Selected** list.

To move all measures in the **Measures** list to the **Measures Selected** list, click >>.
 - To remove a measure from the **Measures Selected** pane, click the measure to highlight it, and then click < to move it back to the **Measures** list.

To remove all measures from the **Measures Selected** list, click <<.

3. When you have selected the measures to include in the report, click **Save** to close the window and save the selected measures.

To close the **Measures** window without saving your selection, click **Close** or **Cancel**.

6.15 Selecting Report Dates

Many CRS reports allow you to specify the date range of the report data (the beginning and ending calendar months), the year of the report, and the baseline year the report data is being compared to.

There are two ways to select date ranges:

1. Select from a set of predefined date ranges.
 - For most reports, select one of four calendar year periods (January 1–December 31, April 1 – March 31, July 1 – June 30, and October 1 – September 30).
 - For the **CMS Performance Report** option, select one of four quarters (January 1 – March 31, April 1 – June 30, July 1 – September 30, and October 1 – December 31).

See [Select a predefined date range](#) below for instructions.

2. Run the report for a user-defined period.

See [Specify a user-defined report period](#) below for instructions.

Reports such as the National GPRA & PART Report use a predefined report period of July 1, 2008 through June 30, 2009, with a baseline year of July 1, 1999 through June 30, 2000.

6.15.1 Select a predefined date range

1. In the **Date Range** list, select one of the predefined calendar years or quarters.
2. In the **Report Year** box, do one of the following:
 - Type the year of the report end date.
 - Click the arrow to display the calendar. Navigate to a month in the year of the report end date, and then click any date in that month.

3. If your report has a **Base Line Year** box, do one of the following:
 - Type the year of the baseline end date.
 - Click the arrow to display the calendar. Navigate to a month in the year of the baseline end date, and then click any date in that month.

6.15.2 Specify a user-defined report period

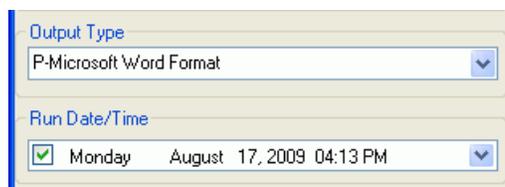
1. In the **Date Range** list, select **User Defined Report Period**.
2. Your report may have a **Report End** box, or it may have a **Begin Date** and an **End Date** box. To set the date, do one of the following:
 - Select the month, date, and/or year that appears in the box. Type the month, date, and/or year of the date you want the report period to end, or use the UP and DOWN ARROW keys for each component to select the correct date.
 - Click the arrow to display the calendar. Navigate to the month and year you want the report period to end, and then click the correct date in that month.
3. Your report may have a **Base Line Year** box or a **Report Year** box. To set the date, do one of the following:
 - Type the year of the baseline end date.
 - Click the arrow to display the calendar, navigate to a month in the year of the baseline end date, and then click any date in that month.

6.16 Selecting Report Output Options

Most CRS reports can be output in either Microsoft Word format, Microsoft Excel format, or both. Because a large report can take a very long time to run, Visual CRS also provides the option to queue reports to run at a time you specify.

Completed reports are stored on the personal computer used to run them and can be viewed from within Visual CRS.

Select report output options



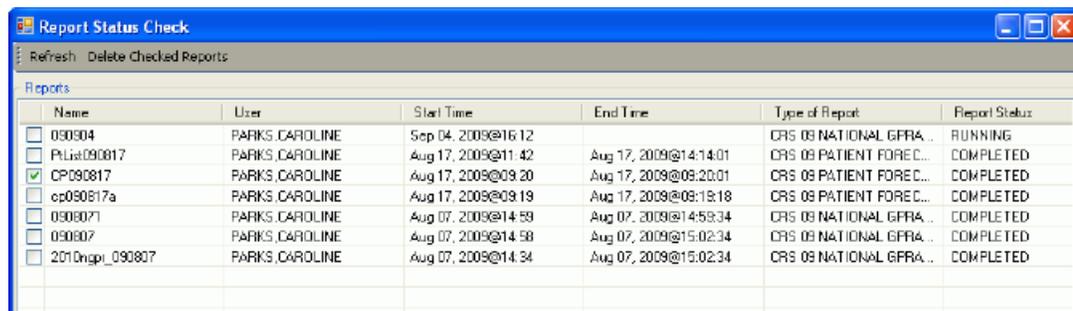
The screenshot shows a dialog box titled "Select report output options". It contains two main sections. The first section, "Output Type", has a dropdown menu currently showing "P-Microsoft Word Format". The second section, "Run Date/Time", has a checked checkbox and a dropdown menu showing "Monday August 17, 2009 04:13 PM".

Figure 6-23: Report output options

1. In the **Output Type** list, select one of the following:
 - **P-Microsoft Word Format** to create a Microsoft Word document that can be printed or viewed on the screen.
 - **D-Microsoft Excel Format** to create a delimited file that can be opened in Microsoft Excel.
 - **B-Both Microsoft Word and Excel Format** to create both a Word document and an Excel document.
2. To change the date the report will run, do one of the following:
 - In the **Run Date/Time** box, click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
 - Click the month, the date, or the year, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.
3. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the UP ARROW and DOWN ARROW keys on your keyboard to change the value.

6.17 Viewing a Completed or Queued Report

To view the status of your reports, click **Report Status** at the top of the **Visual CRS** window to display the **Report Status Check** window.



Name	User	Start Time	End Time	Type of Report	Report Status
<input type="checkbox"/> 030304	PARKS, CAROLINE	Sep 04, 2009@16:12		CRS 09 NATIONAL GFRA...	RUNNING
<input type="checkbox"/> PLIst090817	PARKS, CAROLINE	Aug 17, 2009@11:42	Aug 17, 2009@14:14:01	CRS 09 PATIENT FOREC...	COMPLETED
<input checked="" type="checkbox"/> CP090817	PARKS, CAROLINE	Aug 17, 2009@09:20	Aug 17, 2009@09:20:01	CRS 09 PATIENT FOREC...	COMPLETED
<input type="checkbox"/> cp090817a	PARKS, CAROLINE	Aug 17, 2009@09:19	Aug 17, 2009@09:19:18	CRS 09 PATIENT FOREC...	COMPLETED
<input type="checkbox"/> 030307	PARKS, CAROLINE	Aug 07, 2009@14:59	Aug 07, 2009@14:59:34	CRS 09 NATIONAL GFRA...	COMPLETED
<input type="checkbox"/> 030307	PARKS, CAROLINE	Aug 07, 2009@14:58	Aug 07, 2009@15:02:34	CRS 09 NATIONAL GFRA...	COMPLETED
<input type="checkbox"/> 201Dngpt_090807	PARKS, CAROLINE	Aug 07, 2009@14:34	Aug 07, 2009@15:02:34	CRS 09 NATIONAL GFRA...	COMPLETED

Figure 6-24: Report Status Check window

- If the **Report Status** column for a report contains “COMPLETED,” click anywhere in the row to open the report file.
- If the **Report Status** column contains “RUNNING,” the report is either currently being created or is queued to run at a later time.

7.0 Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

Phone: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: support@ihs.gov