



RESOURCE AND PATIENT MANAGEMENT SYSTEM

Clinical Reporting System

(BGP)

Visual CRS User Manual

Version 11.0
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Division of Information Resource Management
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Preface

This user manual provides instructions for using Visual Clinical Reporting System (CRS) 2011–Version 11.0.

The contents of the Visual CRS 2011 User Manual are organized by subject matter, with chapters and pages corresponding to the Visual CRS v11.0 menu folders and options.

Note: 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 11.0 User Manual*.

For sample output and information on the logic used for each performance measure, refer to the *CRS Version 11.0 Clinical Performance Measure Logic Manual*.

For information on installing the Visual CRS 2011 GUI on your Resource and Patient Management System server and client PC, refer to the *CRS Version 11.0 Installation Guide*.

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1.0 Welcome to Visual CRS 2011

Visual Clinical Reporting System (CRS) 2011 is a graphical user interface (GUI) version of the CRS, Version 11.0 for FY 2011 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 11.0 including setting up site parameters and taxonomies, running reports and patient lists at the facility level, and running reports at the Area Office level.

For information on using the Visual CRS main window, see [The Visual CRS Main Window](#).

This manual in its entirety can be accessed from the Visual CRS 2011 application through the **Help** menu:

- To view the Help topics in a chapter, double-click the chapter icon () or the chapter name in the **Table of Contents** pane.
- To view the Help topic for a specific report, do one of the following:
 - In the **Table of Contents** pane, click the report name.
 - In the **Report Definition** window, click .
 - To return to a previously viewed Help topic, click the **Back** button at the top of the **Help** window.
- To exit Visual CRS 2011 Help, click  in the top right corner of the window.

2.0 The Visual CRS Main Window

The Visual CRS window contains the following items:

- Menu pane
- Report Status button
- Preferences button
 - Change Division option
 - Change Version option
 - Change Report Directory option
- Exit button
- Help button
- About button

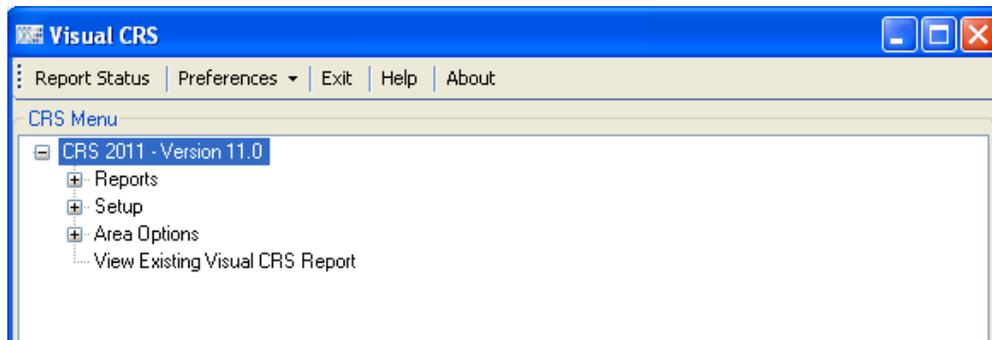


Figure 2-1: **Visual CRS** main window

2.1 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.

- 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 report or setup option within the folder.

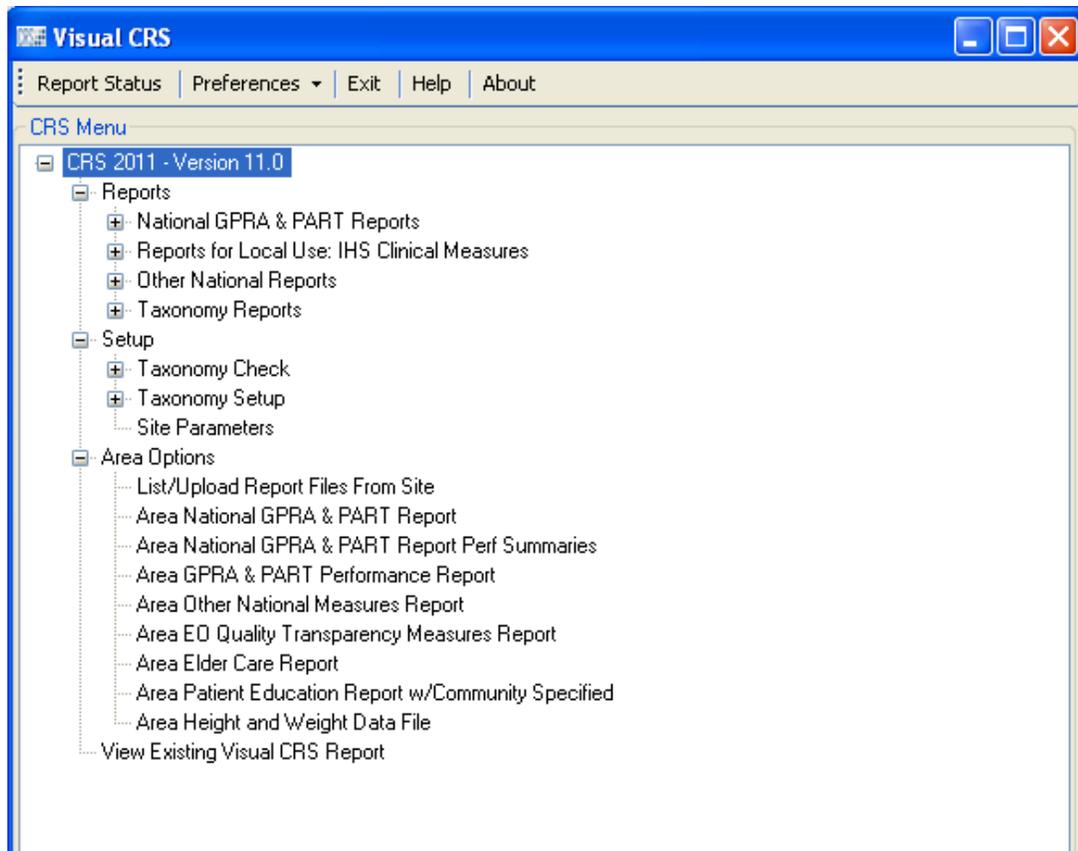


Figure 2-2: **Visual CRS** main window with folders expanded

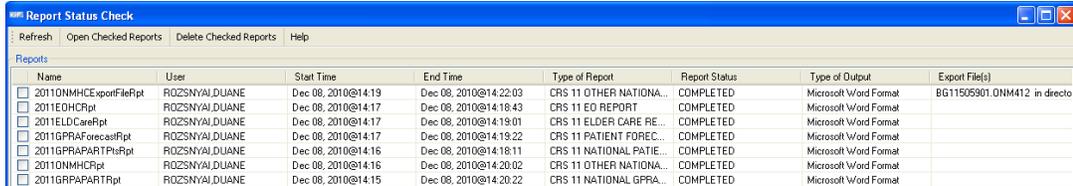
2.2 Report Status Button

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.

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 open a single report, do one of the following:
 - a. Double-click the COMPLETED report to be opened.
 - b. Highlight the COMPLETED report to be opened and press **Enter**.
 - c. Check the COMPLETED report to be opened then click **Open Checked Reports** at the top of the window.

- To open multiple reports, select the check boxes next to the **COMPLETED** reports to be opened, then click **Open Checked Reports** at the top of the window.
- To delete one or more reports, select the check box or boxes next to the reports to be deleted, 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.
- To exit the **Report Status Check** window, click the  in the top right corner of the window.



Name	User	Start Time	End Time	Type of Report	Report Status	Type of Output	Export File(s)
<input type="checkbox"/> 2011ONMHCEsporFileRpt	ROZSNYAJDUANE	Dec 08, 2010@14:19	Dec 08, 2010@14:22:03	CRS 11 OTHER NATIONAL...	COMPLETED	Microsoft Word Format	BG11505901.ONM412 in directo
<input type="checkbox"/> 2011E0HCRpt	ROZSNYAJDUANE	Dec 08, 2010@14:17	Dec 08, 2010@14:18:43	CRS 11 EQ REPORT	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011ELD CareRpt	ROZSNYAJDUANE	Dec 08, 2010@14:17	Dec 08, 2010@14:19:01	CRS 11 ELDER CARE RE...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011GPRAForecastRpt	ROZSNYAJDUANE	Dec 08, 2010@14:17	Dec 08, 2010@14:19:22	CRS 11 PATIENT FOREC...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011GPRAPARTPhsRpt	ROZSNYAJDUANE	Dec 08, 2010@14:16	Dec 08, 2010@14:18:11	CRS 11 NATIONAL PATIE...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011ONMHCRpt	ROZSNYAJDUANE	Dec 08, 2010@14:16	Dec 08, 2010@14:20:02	CRS 11 OTHER NATIONAL...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011GPRAPARTRpt	ROZSNYAJDUANE	Dec 08, 2010@14:15	Dec 08, 2010@14:20:22	CRS 11 NATIONAL GPRA...	COMPLETED	Microsoft Word Format	

Figure 2-3: Report Status window

2.3 Preferences Button

The **Preferences** button provides the following options:

1. **Change Division:** In a multidivisional database system, allows you to run reports for other sites within the database.
2. **Change Version:** Allows you to run reports using older versions of Visual CRS.
3. **Change Report Directory:** Allows you to change the directory where your reports will be queued.

2.4 Change Division Option

If your site has a multidivisional 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 **Preferences** at the top of the Visual CRS window to display the **Preferences** menu.
2. Click **Change Division** on the **Preferences** menu to display the **Change Division** window.
3. 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 the **Change Division** option again to log in to a different site.

2.5 Change Version Option

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 2011–version 11.0) runs reports using the 2011 performance measure logic.

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

1. Click **Preferences** at the top of the **Visual CRS** window to display the **Preferences** menu.
2. Click **Change Version** on the **Preferences** menu to display the **Select CRS Product** window.
3. 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 the **Change Version** option again to run reports based on logic for a different GPRA year.

2.6 Change Report Directory Option

You can change the default directory where your reports will be queued. For example, if your default directory is unavailable, you can change the report location, allowing you to continue to run your reports without interruption.

To change the reports directory, follow these steps:

1. Click **Preferences** at the top of the **Visual CRS window** to display the **Preferences** menu.
2. Click **Change Reports Directory** on the **Preferences** menu to display the **Browse For Folder** window.
3. Select a directory by clicking to the left of the folder name until you reach the directory where the reports should be queued.

To create a new folder, click **Make New Folder**.

CRS reports can be placed on a local directory, a mapped directory, or a network share directory.

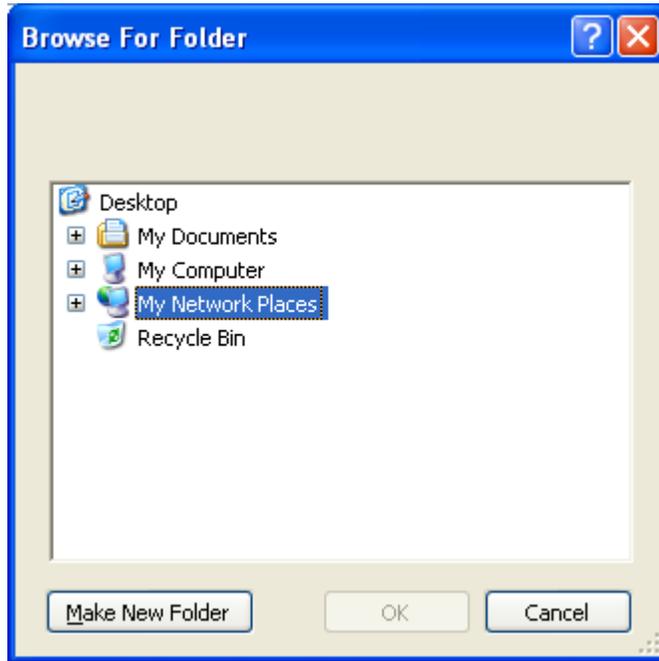


Figure 2-4: **Browse For Folder** window

2.7 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.

2.8 Help Button

To open the Visual CRS 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.

2.9 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 11.0** dialog box.

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

3.0 Running Reports

3.1 National GPRA & PART Reports

3.1.1 National GPRA & PART Report

Use this option to produce a National Government Performance and Results Act (GPRA) & Program Assessment Rating Tool (PART) Report for the 2011 GPRA year using the performance measure definitions from CRS version 11.0. The following parameters are predefined for this report:

- A report period of July 1, 2010 through June 30, 2011
- A baseline year of July 1, 1999 through June 30, 2000
- A beneficiary population of American Indian/Alaska Native (AI/AN) only (defined as Beneficiary 01 in the Patient Registration file)

Note: See Section 5.2 in the CRS Version 11.0 User Manual for additional information on the 2011 National GPRA and PART Report.

3.1.1.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **National GPRA & PART Report** window.

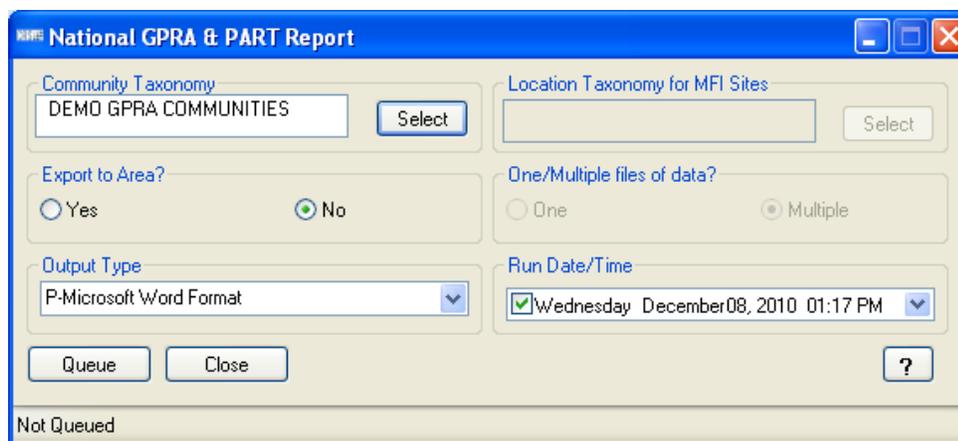


Figure 3-1: National GPRA & PART Report window

3. Under **Community Taxonomy**, do one of the following:
 - a. 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.)
 - b. 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:
 - a. To send final data to your Area Office, click Yes.

If you choose to export the data to your Area Office, the software checks the **Export Height and Weight Data?** site parameter. If this parameter is set to No, the warning message shown below is displayed.

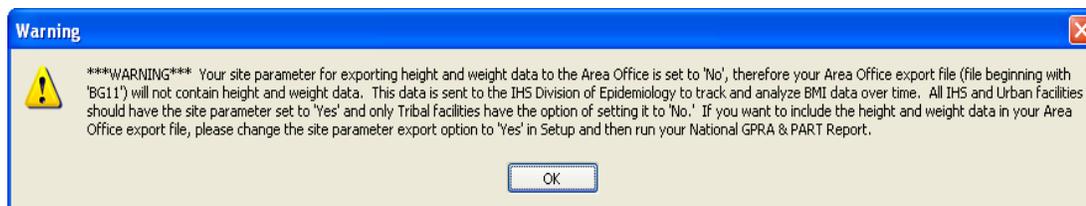


Figure 3-2: National GPRA & PART Report Height and Weight Export Warning message

If the **Export Height and Weight Data?** site parameter is set to "Yes", the following information message shown below will be displayed.



Figure 3-3: National GPRA & PART Report Height and Weight Export Information message

For more information on setting site parameters, see [Site Parameters](#).

- b. 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.

- 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](#).

3.1.2 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.

See Section 5.3 in the CRS Version 11.0 User Manual for additional information on the National GPRA and PART Patient List.

3.1.2.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **National GPRA & PART Report Patient List** window.

Figure 3-4: National GPRA & PART Report Patient List window

3. To select performance measures and patient lists, click the **Select Measure(s)** button 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:
 - a. **R–Random Patient List**
 - b. **P–Patient Lists by Provider**
 - c. To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - d. **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
7. Under **Community Taxonomy**, do one of the following:

- a. 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.)
 - b. 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](#).

3.1.3 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, 2010 through June 30, 2011
- 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)

<p>Note See Section 5.4 in the CRS Version 11.0 User Manual for additional information on the National GPRA and PART Clinical Performance Summaries Report.</p>
--

3.1.3.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **National GPRA & PART Clinical Performance Summaries** window.

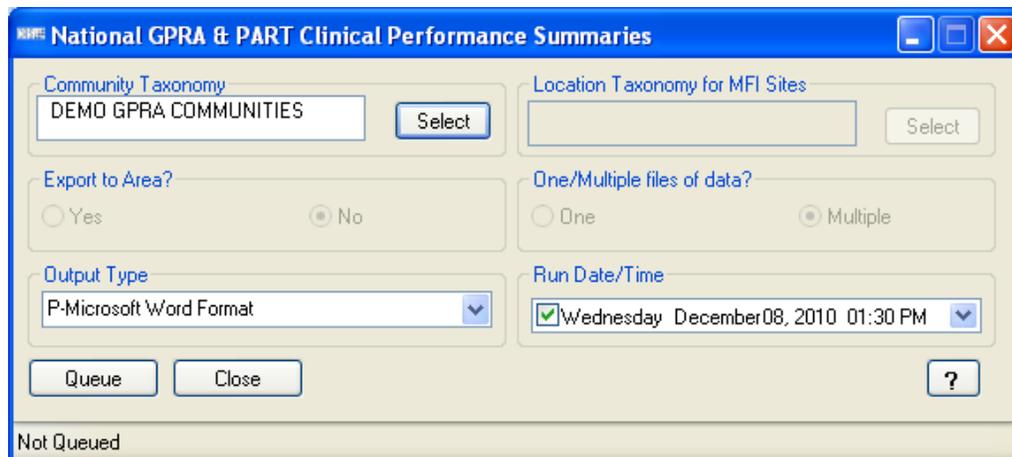


Figure 3-5: **National GPRA & PART Clinical Performance Summaries** window

3. Under **Community Taxonomy**, do one of the following:
 - a. 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.)
 - b. 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: 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**.
7. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.4 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, 2010 through June 30, 2011
- 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)

Note: See Section 5.5 in the CRS Version 11.0 User Manual for additional information on the National GPRA and PART Report by Designated Provider.

3.1.4.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **National GPRA & PART Report by Designated Provider** window.

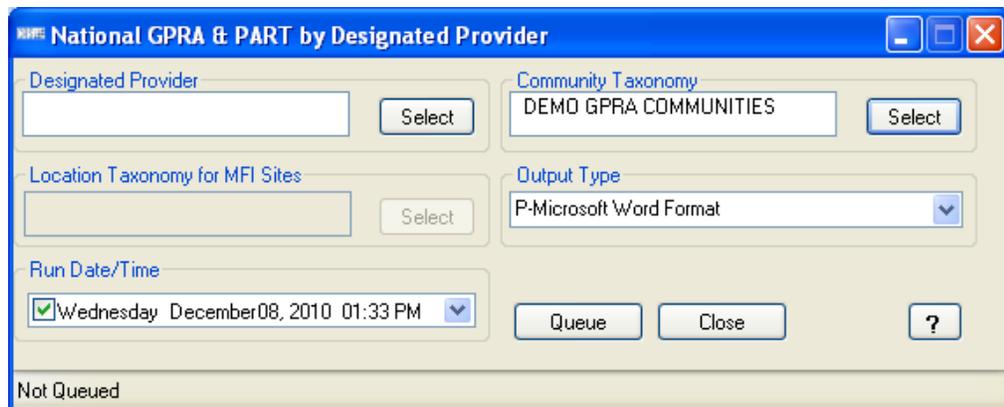


Figure 3-6: **National GPRA & PART Report by Designated Provider** window

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:
 - a. 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.)
 - b. 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](#).

3.1.5 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, 2010 through June 30, 2011. The following parameters are predefined for this file:

- A report period of July 1, 2010 through June 30, 2011
- 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)

Note: See Section 5.6 in the CRS Version 11.0 User Manual for additional information on the National GPRA and PART Height and Weight Local Data File.

3.1.5.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **National GPRA Local Height Weight Report** window.



Figure 3-7: **National GPRA Local Height Weight Report** window

3. Under **Community Taxonomy**, do one of the following:
 - a. 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.)
 - b. 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:

- a. 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.

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

The last 10 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](#).

3.1.6 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.

See Section 5.7 in the CRS Version 11.0 User Manual for additional information on creating a search template for a national GPRA & PART patient list.

3.1.6.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message "All taxonomies are present." is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **Create Search Template for National Patient List** window.

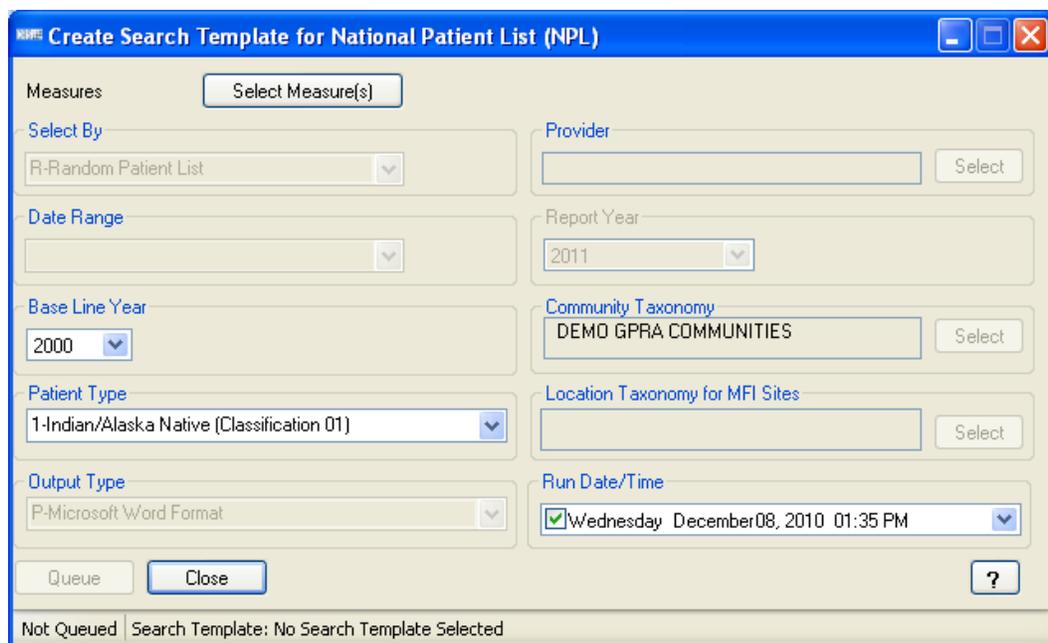


Figure 3-8: **Create Search Template for National Patient List** window

3. To select a performance measure and patient lists, click the **Select Measure(s)** button 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.

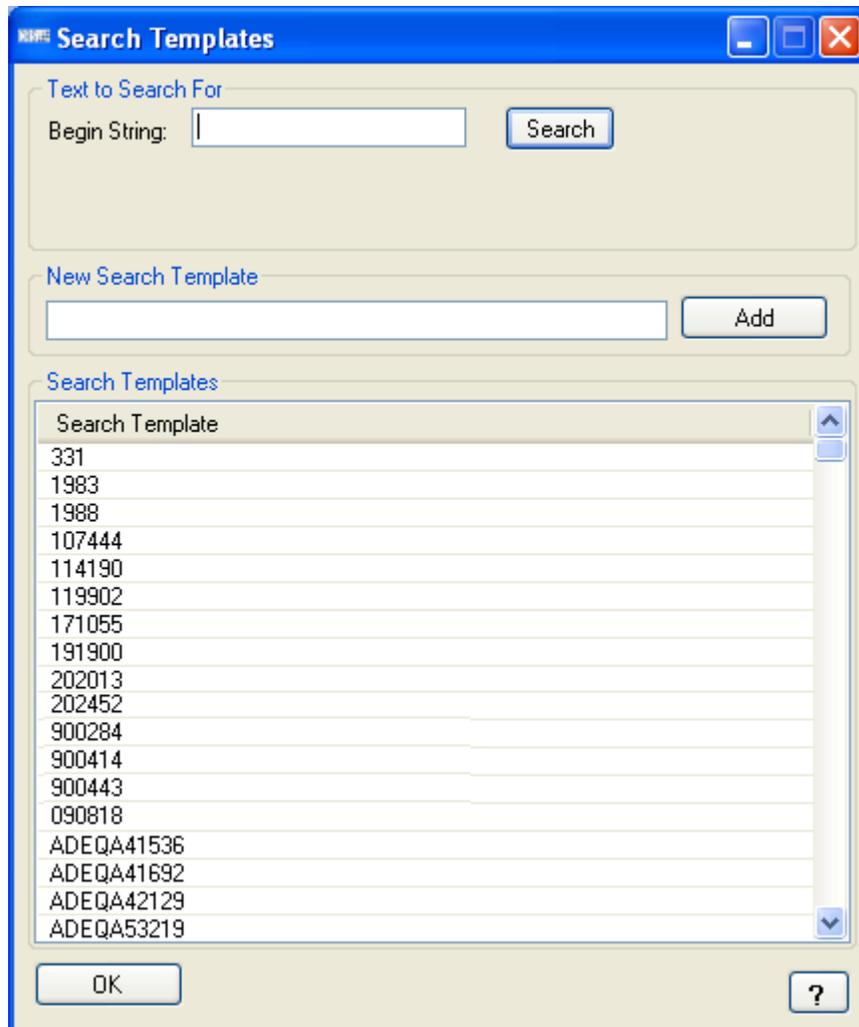


Figure 3-9: **Search Templates** window

4. In the **Search Templates** window, do one of the following:
 - a. To create a new search template, type the name of the template in the **New Search Template** box and click **Add**.
 - b. To overwrite an existing template, click the name of the template in the **Search Templates** list to highlight it.
 - c. 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 (NPL)** window.
6. In the **Select By** list, select one of the following:
 - a. **R–Random Patient List**
 - b. **P–Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. 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.)
 - b. 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:
 - a. **1 - Indian/Alaska Native** (Classification 01)
 - b. **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - c. **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](#).

3.1.7 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 & PART measures that each patient has not yet met. The revised CRS logic used for the GPRA & PART measures is defined in the report, and information for the provider on how to fulfill the GPRA & 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.

See Section 5.8 in the CRS Version 11.0 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 and the results of the taxonomy check.
 - a. 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 **Cancel** button or click the  in the top right corner to close the window, and then use the [Taxonomy Setup](#) option to set up and populate the required taxonomies.
 - b. If the message "All taxonomies are present." is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **GPRA & PART Forecast Patient List** window.

Figure 3-10: GPR & 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.
 - a. [C–By CLINIC NAME for a specified appointment date range](#)
 - b. [P–Selected Patients w/Appointments](#)
 - c. [D–One Facility's or Division's Appointments](#)
 - d. [A–Any selected set of patients regardless of appointment status](#)

Note: The ending appointment date (**End Appt Date**) must be less than seven days after the beginning appointment date (**Begin Appt Date**).

4. In the All Patients or Only Add Ons list, select the criteria you want to use for the forecast patient list.
 - a. **ALL Patients with Appointments in the date range**–This option will forecast all patients with appointment within the selected date range.
 - b. **ONLY Patients added on since a specified date**–This option will forecast only the patients within the selected Appt date range whose appointment was added on or after the specified date in the “**Patients ‘Added On’ on or after what date**” field.
5. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

3.1.7.1 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 3-11: 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. In the **Any Clinic or Selected Clinics** list, select **Any Clinic** or **One or more selected Clinics** option.
 - a. **Any Clinics** option will include patients with appointments to all clinics.
 - b. **One or more selected Clinics** option include patients with appointments to one or more selected clinics.

To select one or more clinics, click **Select** next to the **Select Clinic** box, then follow the instructions in [Selecting Clinics](#). 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".
3. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:
 - a. 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.

- b. 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.

Note: The ending appointment date (**End Appt Date**) must be less than seven days after the beginning appointment date (**Begin Appt Date**).

4. In the All Patients or Only Add Ons list, select the criteria you want to use for the forecast patient list.
 - a. **ALL Patients with Appointments in the date range**—This option will forecast all patients with appointment within the selected date range.
 - b. **ONLY Patients added on since a specified date**—This option will forecast only the patients within the selected Appt date range whose appointment was added on or after the specified date in the **Patients ‘Added On’ on or after what date** field.
5. 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.
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](#).

3.1.7.2 GPRA & PART Forecast Patient List by Selected Patients with 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 3-12: 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	It
PATIENT,CRS	555334444	23456	Jan 01, 1985	1:
PATIENT,CRSA		900000	Jun 01, 1970	1:
PATIENT,CRSAA		900027	Feb 01, 1947	1:
PATIENT,CRSAB		900028	Mar 01, 1957	1:
PATIENT,CRSAC		900029	Apr 01, 1958	1:
PATIENT,CRSAD		900030	Jun 01, 1958	1:
PATIENT,CRSAE		900031	Jul 01, 1958	1:
PATIENT,CRSAF		900032	Aug 01, 1958	1:
PATIENT,CRSAG		900033	Jan 01, 1958	1:
PATIENT,CRSAG		900034	Jun 01, 1958	1:
PATIENT,CRSAH		900035	Jul 01, 1957	1:

Figure 3-13: **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:

- a. Type another patient's information in the **Type Patient Name** box and click **Display**.
 - b. 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:
 - a. 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.
 - b. 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.

Note: The ending appointment date (**End Appt Date**) must be less than seven days after the beginning appointment date (**Begin Appt Date**).

6. 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.
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](#).

3.1.7.3 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 3-14: **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 multidivisional, only the name of your facility will be displayed.

3. In the **Any Clinic or Selected Clinics** list, select **Any Clinic** or **One or more selected Clinics** option.

a. **Any Clinics** option will include patients with appointments to all clinics.

b. **One or more selected Clinics** option includes patients with appointments to one or more selected clinics.

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

4. In the **Begin Appt Date** and **End Appt Date** boxes, do one of the following:

a. 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.

- b. 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.

Note: The ending appointment date (**End Appt Date**) must be less than seven days after the beginning appointment date (**Begin Appt Date**).

5. In the All Patients or Only Add Ons list, select the criteria you want to use for the forecast patient list.
 - a. **ALL Patients with Appointments in the date range**—This option will forecast all patients with appointment within the selected date range.
 - b. **ONLY Patients added on since a specified date**—This option will forecast only the patients within the selected Appt date range whose appointment was added on or after the specified date in the “Patients ‘Added On’ on or after what date” field.
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](#).

3.1.7.4 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 3-15: 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:

- a. To select patients manually, click No under Search Template?.
- b. Click Select next to the Select Patient(s) box to display the Multiple Patient Select window, and follow the instructions in Selecting Multiple Patients.
- c. To report on patients included in a search template, click Yes under Search Template?. The Select Patient(s) label changes to Select Search Template.
- d. 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.

- 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:

- 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.
 - 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.
- 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](#).

3.1.8 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.

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

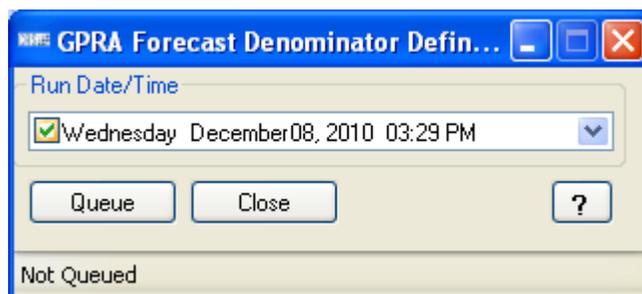


Figure 3-16: GPRA Forecast Denominator Definition window

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](#).

3.1.9 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 Office of Management and Budget (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 Patient List** menu option will not be displayed for users without this security key.

See Section 5.10 in the CRS Version 11.0 User Manual for additional information on the Comprehensive National GPRA and PART Patient List.

3.1.9.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **Comprehensive National GPRA Patient List** window.

Figure 3-17: **Comprehensive National GPRA Patient List** window

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

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–(Both Indian/Alaska Natives and Non-01)**
6. Under **Community Taxonomy**, do one of the following:
 - a. 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.)

- b. 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.

<p>Note: See Section 5.11.2.1 in the CRS Version 11.0 User Manual for additional information on the Selected Measures with Community Specified Report.</p>

3.2.1.1 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.

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

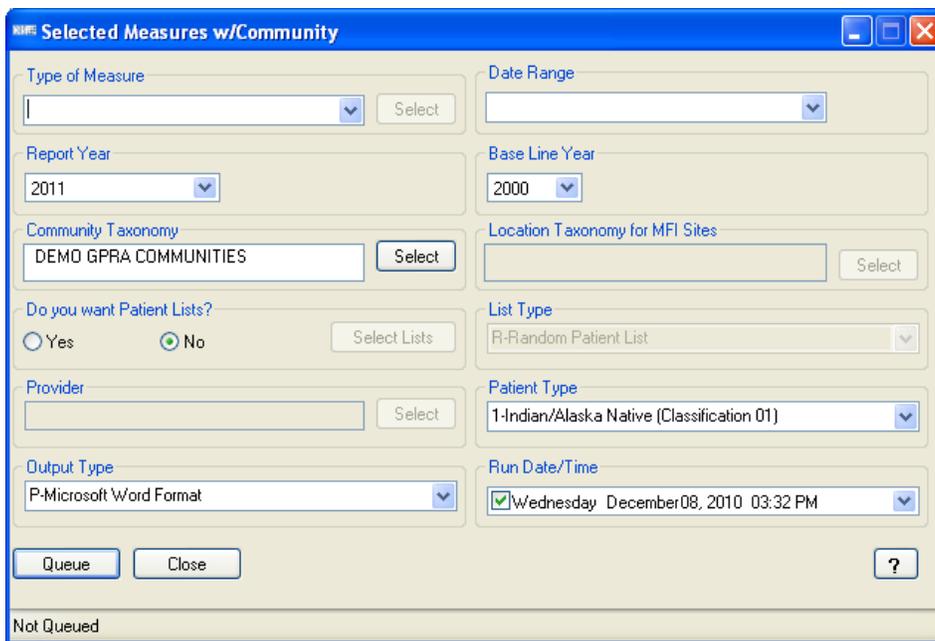


Figure 3-18: **Selected Measures w/Community** window

3. In the **Type of Measure** list, do one of the following:
 - a. Select one of the predefined sets of performance measures.
 - Diabetes-Related Measures
 - Cardiovascular Disease Prevention for At-Risk Patients
 - Women's Health-Related Measures
 - b. 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:
 - a. 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.)
 - b. 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:
 - a. Click **Yes** to generate patient lists with this report, and then click **Select Measures** to display the **Patient List Measures** window.
 - b. To select patient list measures, follow the instructions in [Selecting Patient Lists](#).
 - c. 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:
 - a. **R–Random Patient List**
 - b. **P–Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **A–All Patients**
9. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **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.

Note: See Section 5.11.2.2 in the CRS Version 11.0 User Manual for additional information on the Selected Measures with Patient Panel Population Report.

3.2.2.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **Selected Measures w/Patient Panel** window.

Figure 3-19: **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:
 - a. Select one of the predefined sets of performance measures.
 - b. 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:
 - a. 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](#).

- b. 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.

- a. **R–Random Patient List**

- b. **P–Patient Lists by Provider**

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

- c. **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.

Note: See Section 5.11.2.3 in the CRS Version 11.0 User Manual for additional information on the Selected Measures with All Communities Report.

3.2.3.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **Selected Measures w/All Communities** window.

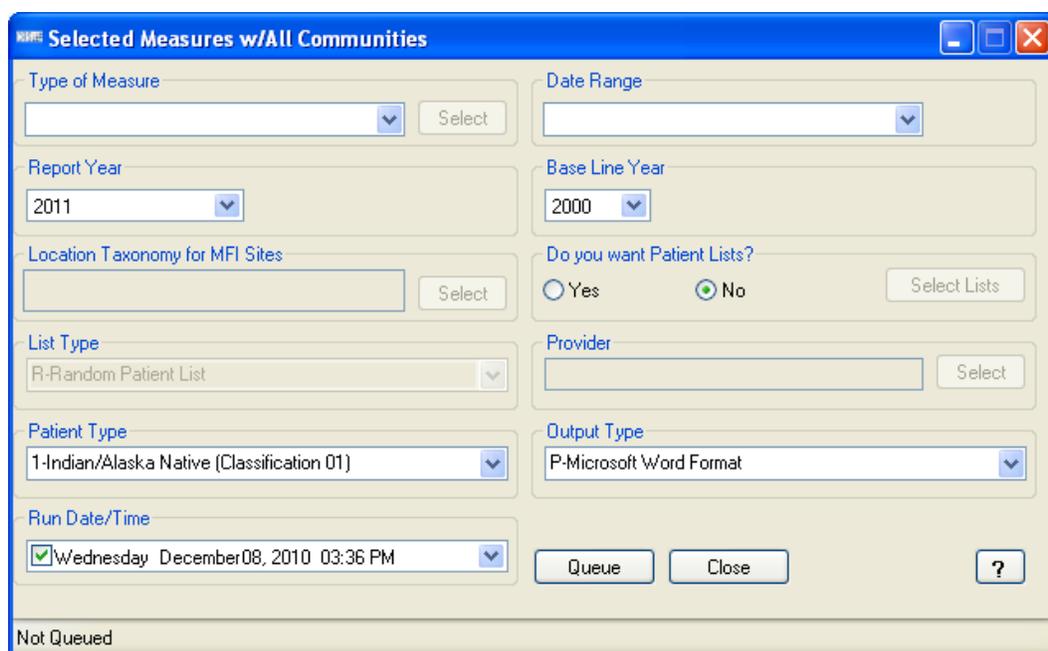


Figure 3-20: **Selected Measures w/All Communities** window

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

The Centers for Medicare and Medicaid Services (CMS) Performance Report has been removed from the CRS version 11.0. This report is still available for previous released versions of CRS. For details on running this report see the Section 5.12 in the previous released CRS Version 10.0 User Manual or Section 3.2.4 of the previous released Visual CRS 2010 Version 10.0 user manual for additional information.

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).

<p>Note: See Section 5.13 in the CRS Version 11.0 User Manual for additional information on the GPRA & PART Performance Report.</p>
--

3.3.1.1 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.

- a. 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 **Cancel** button or click the  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.
- b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **GPRA & PART Performance Report** window.

Figure 3-21: **GPRA & PART Performance Report** window

3. In the **Report on a Patient Panel** option select **Yes** or **No**.
 - a. If you select **Yes**, the template's name is displayed in the **Search Template** box. If no search template has been selected, the box is empty.
 - b. 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. 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:

- a. 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.)
 - b. 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 **Export to Area?**, do one of the following:
- a. To send final data to your Area Office, click **Yes**.
 - b. If you are not ready to send final data to your Area Office, click **No**.
8. In the **Patient Type** list, select one of the following beneficiary populations to report on:
- a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
9. 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](#).
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](#).

3.3.2 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.

Note: See Section 5.14 in the CRS Version 11.0 User Manual for additional information on the Other National Measures Report.

3.3.2.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **Other National Measures Report** window.

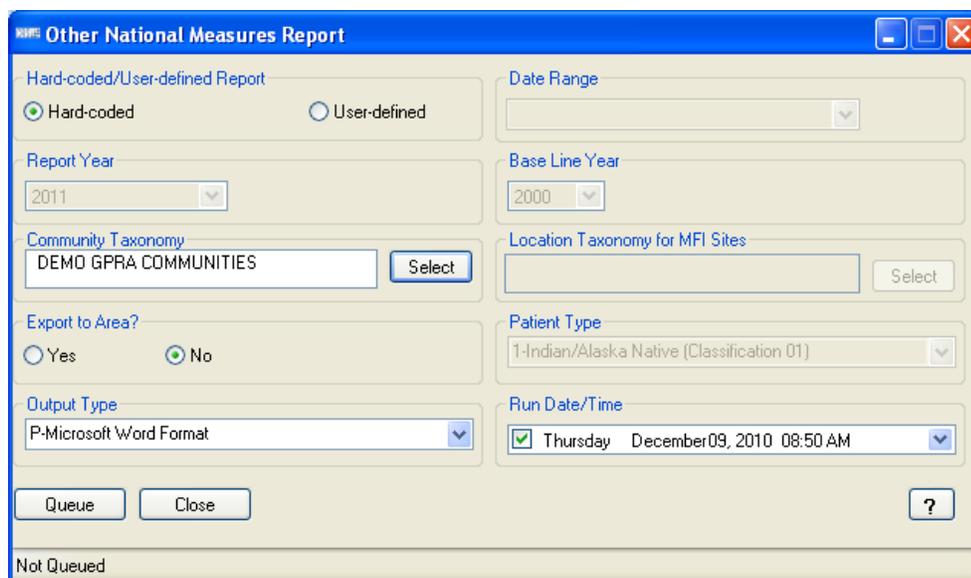


Figure 3-22: **Other National Measures Report** window

3. Under **Hard-coded/User-defined Report**, do one of the following:
 - a. 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](#).
 - b. 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](#).

3.3.2.2 Other National Measures Report: Hard-Coded Report Option

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

The screenshot shows a software window titled "Other National Measures Report". It features a "Hard-coded/User-defined Report" section with "Hard-coded" selected. Below this are fields for "Date Range", "Report Year" (set to 2011), and "Base Line Year" (set to 2000). There are two "Select" buttons for "Community Taxonomy" (currently showing "DEMO GPRA COMMUNITIES") and "Location Taxonomy for MFI Sites". The "Export to Area?" section has "No" selected. "Patient Type" is set to "1-Indian/Alaska Native (Classification 01)". "Output Type" is set to "P-Microsoft Word Format". "Run Date/Time" is set to "Thursday December09, 2010 08:50 AM". At the bottom, there are "Queue" and "Close" buttons, a help icon, and a status bar that says "Not Queued".

Figure 3-23: **Other National Measures Report** window (**Hard-coded Report** option)

1. Under **Hard-coded/User-defined Report**, select **Hard-coded** (default).
2. Under **Community Taxonomy**, do one of the following:
 - a. 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.)

- b. 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:
 - a. To send final data to your Area Office, click **Yes**.
 - b. 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](#).

3.3.2.3 Other National Measures Report: User-Defined Report Option

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

Figure 3-24: **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:
 - a. 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.)
 - b. 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:
 - a. To send final data to your Area Office, click **Yes**.
 - b. 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:
 - a. **1 - Indian/Alaska Native** (Classification 01)
 - b. **2 - Not Indian Alaskan/Native** (Not Classification 01)
 - c. **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.

See Section 5.15 in the CRS Version 11.0 User Manual for additional information on the Other National Measures Report Patient List.

3.3.3.1 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.

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

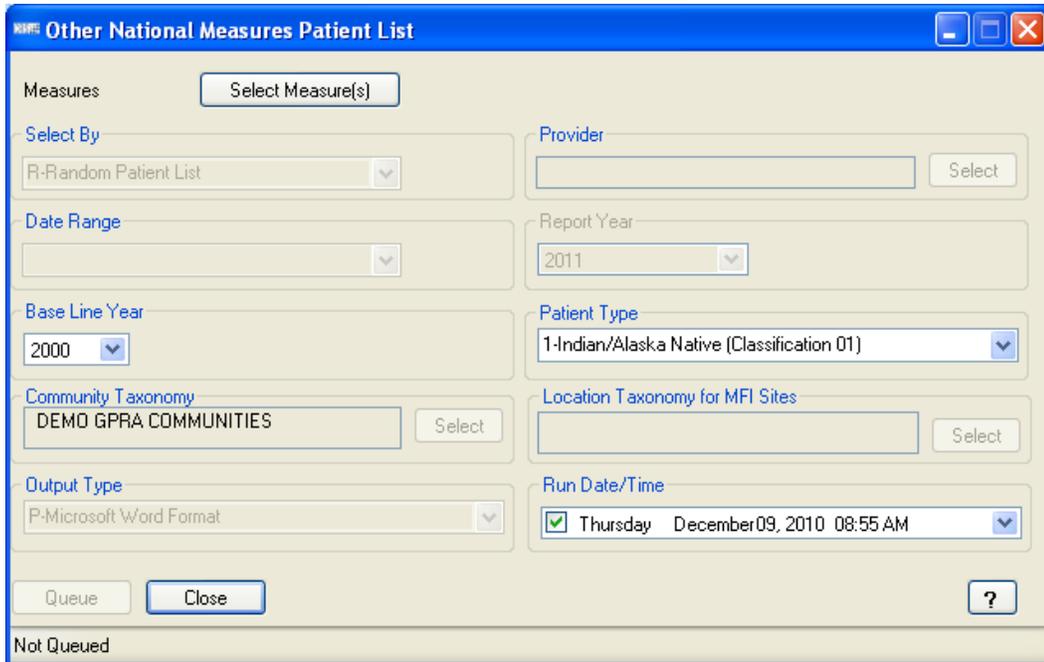


Figure 3-25: **Other National Measures Patient List** window

3. To select performance measures and patient lists, click the **Select Measure(s)** button 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:
 - a. **R–Random Patient List**
 - b. **P–Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
7. Under **Community Taxonomy**, do one of the following:
 - a. 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.)
 - b. 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 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.

Note: See Section 5.16 in the CRS Version 11.0 User Manual for additional information on the EO Quality Transparency Measures Report.

3.3.4.1 Run the EO 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **EO Quality Transparency Measures** window.

Figure 3-26: EO Quality Transparency Measures window

3. Under **Hard-coded/User-defined Report**, do one of the following:
 - a. 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](#).
 - b. 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](#).

3.3.4.2 EO Quality Transparency Measures Report: Hard-Coded Report Option

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

Figure 3-27: 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:
 - a. 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.)
 - b. 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:
 - a. 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.
 - b. Click **No** to run the report without generating patient lists. Continue with Step 6.

<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>
--

5. In the **List Type** list, select one of the following:
 - a. **R–Random Patient List**
 - b. **P–Patient Lists by Provider**
To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. To send final data to your Area Office, click **Yes**.
 - b. 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](#).

3.3.4.3 EO Quality Transparency Measures Report: User-Defined Report Option

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

The screenshot shows the 'EO Quality Transparency Measures' window with the following settings:

- Hard-coded/User-defined Report:** User-defined
- Measures:** Selected (with a 'Select' button)
- Date Range:** (empty dropdown)
- Report Year:** 2011 (dropdown)
- Base Line Year:** 2000 (dropdown)
- Community Taxonomy:** DEMO GPPA COMMUNITIES (with a 'Select' button)
- Location Taxonomy for MFI Sites:** (empty text box with a 'Select' button)
- Do you want Patient Lists?:** No (with a 'Select Lists' button)
- List Type:** R-Random Patient List (dropdown)
- Provider:** (empty text box with a 'Select' button)
- Patient Type:** 1-Indian/Alaska Native (Classification 01) (dropdown)
- Export to Area?:** No
- Output Type:** P-Microsoft Word Format (dropdown)
- Run Date/Time:** Thursday December 09, 2010 09:02 AM (dropdown)

Buttons at the bottom: Queue, Close, and a help icon (?). The status bar at the bottom left says 'Not Queued'.

Figure 3-28: 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:
 - a. To run this report on all performance measures, select **All**.
 - b. 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:
 - a. 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.)

- b. 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:
 - a. 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.
 - b. 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:
 - a. **R–Random Patient List**
 - b. **P–Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
9. Under **Export to Area?**, do one of the following:
 - a. To send final data to your Area Office, click **Yes**.
 - b. 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.

Note: See Section 5.17 in the CRS Version 11.0 User Manual for additional information on the Elder Care Report.

3.3.5.1 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **Elder Care Report** window.

Figure 3-29: Elder Care Report window

3. Under **Measures**, do one of the following:
 - a. To run this report on all performance measures, select **All**.
 - b. 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:
 - a. 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.)
 - b. 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:
 - a. 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.
 - b. To run this report without patient lists, select **No** and skip to Step 9.

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.

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

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
10. Under **Export to Area?**, do one of the following:
 - a. To send final data to your Area Office, click **Yes**.
 - b. 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

The Healthcare Effectiveness Data and Information Set (HEDIS) Performance Report has been removed from the CRS version 11.0. This report is still available for previous released versions of CRS. For details on running this report see the Section 5.18 in the previous released CRS Version 10.0 User Manual or Section 3.3.6 of the previous released Visual CRS 2010 Version 10.0 user manual for additional information.

3.3.7 Patient Education Reports

3.3.7.1 Patient Education w/Community Specified

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

Note: See Section 5.19 in the CRS Version 11.0 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.
 - a. 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 **Cancel** button or click the  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.

- b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the **Patient Ed with Community Specified Report** window.

Figure 3-30: **Patient Ed with Community Specified** window

3. Under **Measures**, do one of the following:
 - a. To run this report on all performance measures, select **All**.
 - b. 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:
 - a. 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.)

- b. 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:
 - a. 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.
 - b. 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:
 - a. **R–Random Patient List**
 - b. **P–Patient Lists by Provider**

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
10. Under **Export to Area?**, do one of the following:
 - a. To send final data to your Area Office, click **Yes**.
 - b. 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](#).

3.3.7.2 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.

Note: See Section 5.20 in the CRS Version 11.0 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.
 - a. 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 **Cancel** button or click the  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.
 - b. If the message “All taxonomies are present.” is displayed, all taxonomies required for this report have been set up and populated. Click **Continue** to close the window and display the Patient Education w/Patient Panel Report window.

Figure 3-31: Patient Education w/Patient Panel window

3. Under **Measures**, do one of the following:
 - a. To run this report on all performance measures, select **All**.
 - b. 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:

- a. 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.
- b. To run this report without patient lists, select **No** and skip to Step 9.

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.

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

To select a provider, click **Select** next to the **Provider** box and follow the instructions in [Selecting a Provider](#).
 - c. **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
10. Under **Export to Area?**, do one of the following:
 - a. To send final data to your Area Office, click **Yes**.
 - b. 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 Taxonomy Reports

3.4.1 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
- EO Quality Transparency Measures Report
- Selected Measures Reports
- Elder Care Report

Note: See Section 5.21 in the CRS Version 11.0 User Manual for additional information on the lab taxonomy reports.

The CMS and HEDIS Lab Taxonomy Reports have been removed from the CRS Version 11.0. These taxonomy reports are still available for previous released versions of CRS. For details on running these taxonomy reports see the Section 5.21 in the previous released CRS Version 10.0 User Manual or Section 3.4.1 of the released Visual CRS 2010 Version 10.0 user manual for additional information.

3.4.1.1 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.
 - a. To close without displaying the report window, click the **Cancel** button or click the  button in the top right corner to close the **Taxonomy Check** window.
 - b. Click **Continue** to close the window and display the **Lab Taxonomy Report** window.

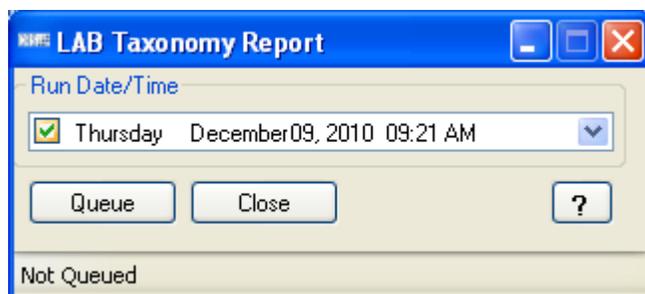


Figure 3-32: Lab Taxonomy Report window

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](#).

3.4.2 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
- EO Quality Transparency Measures Report
- Selected Measures Reports

- Elder Care Report

Note: See Section 5.22 in the CRS Version 11.0 User Manual for additional information on the medication taxonomy reports.

The CMS and HEDIS Medication Taxonomy Reports have been removed from the CRS Version 11.0. These taxonomy reports are still available for previous released versions of CRS. For details on running these taxonomy reports see the Section 5.21 in the previous released CRS Version 10.0 User Manual or Section 3.4.1 of the released Visual CRS 2010 Version 10.0 user manual for additional information.

3.4.2.1 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.
 - a. To close without displaying the report window, click the **Cancel** button or click the  button in the top right corner to close the **Taxonomy Check** window.
 - b. Click **Continue** to close the window and display the **Med Taxonomy Report** window.

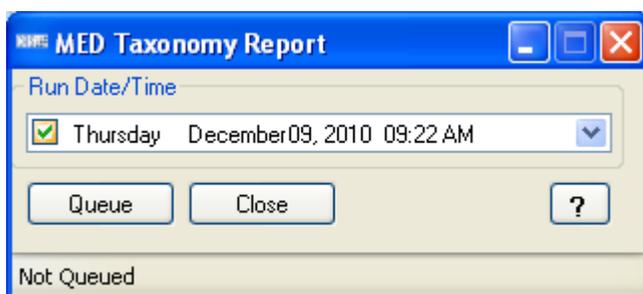


Figure 3-33: **Med Taxonomy Report** window

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 2011

4.1 Taxonomy Check

Before running a report, the taxonomies required for the report must be set up and populated in Visual CRS 2011. 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 2011, you should expect to see a list of taxonomies that are new to the 2011 software and have no entries. Taxonomies that existed before the 2011 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 EO Quality Transparency Measures or Elder Care reports, you can skip those taxonomy checks.

Note: See Section 4.4 in the CRS Version 11.0 User Manual for additional information on the **Taxonomy Check** options.

4.1.1 Check the Taxonomies for a Report

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

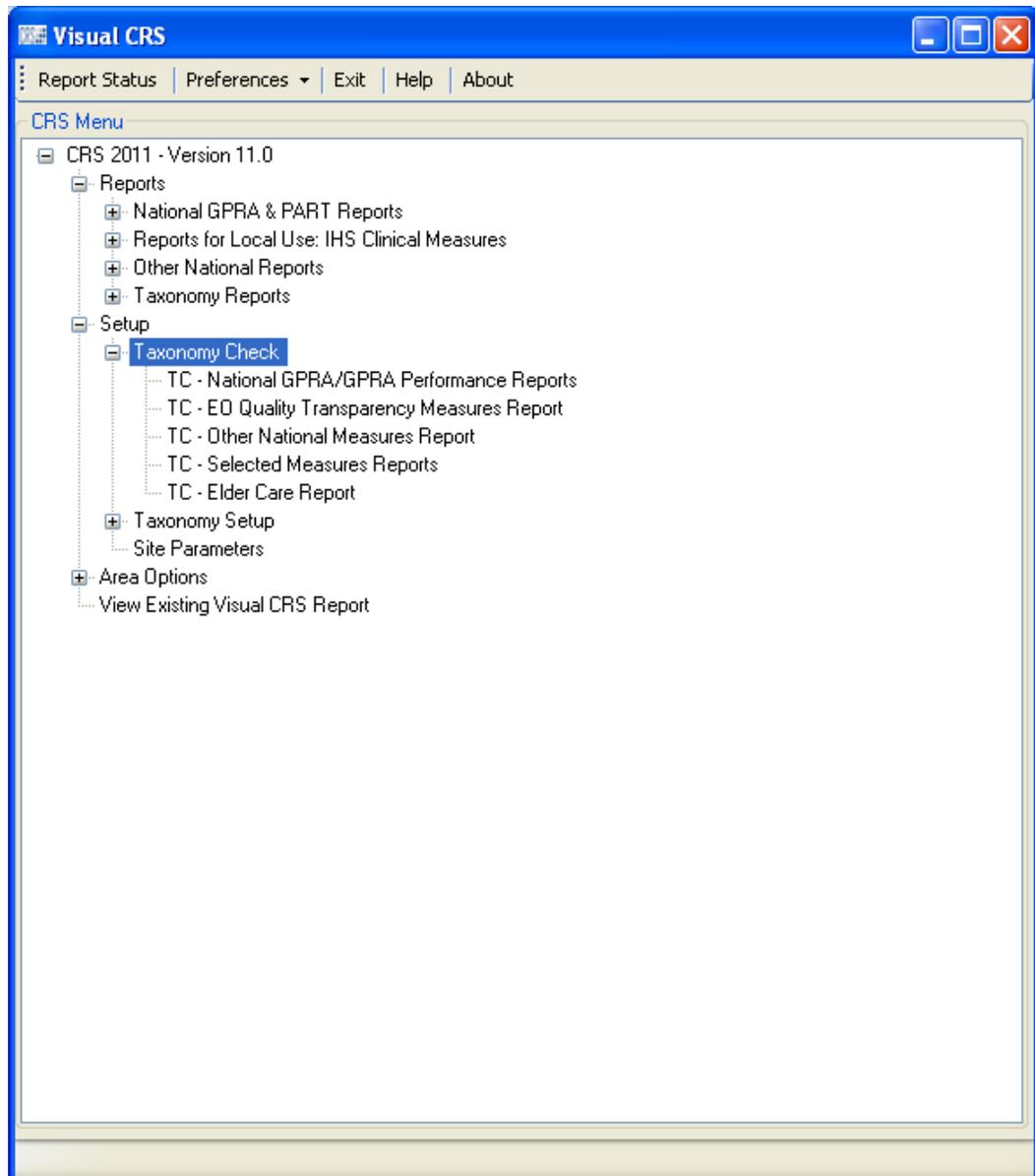


Figure 4-1: Taxonomy Check menu options

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.
 - a. If all taxonomies required for the report have been set up and populated, a message is displayed stating that all taxonomies are present. Click **Continue**, **Cancel**, or the  button in the top right corner to close the window.

- b. 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. Click **Continue**, **Cancel**, or the  button in the top right corner to close the window. Use the [Taxonomy Setup option](#) to add the missing taxonomies before running the report.

Note: See Section 4.5 of the CRS Version 11.0 User Manual for additional information on setting up taxonomies.

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

4.2 Taxonomy Setup

Before running a report, the taxonomies required for the report must be set up and populated in Visual CRS 2011. 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 Elder Care Report, you can skip that taxonomy setup.

Note: All taxonomies should be reviewed for completeness, even though many of the taxonomies used by CRS have already been established and populated by other Resource and Patient Management System (RPMS) applications (e.g., Diabetes Management) or by CRS Version 10.0 2010.

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.

See Section 4.5 in the CRS Version 11.0 User Manual for additional information on setting up taxonomies.

4.2.1 Set Up Taxonomies

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

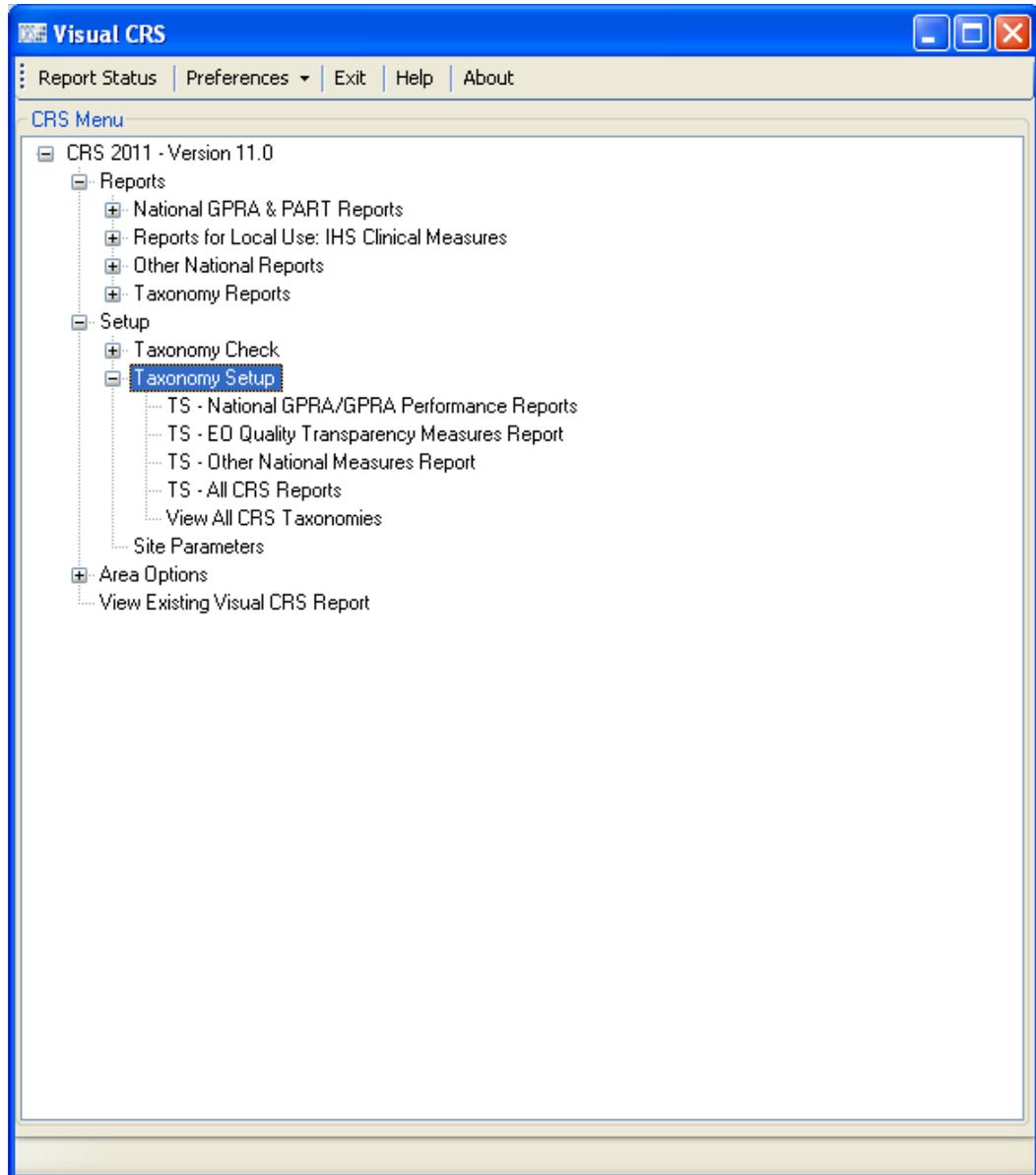


Figure 4-2: Taxonomy Setup menu options

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.

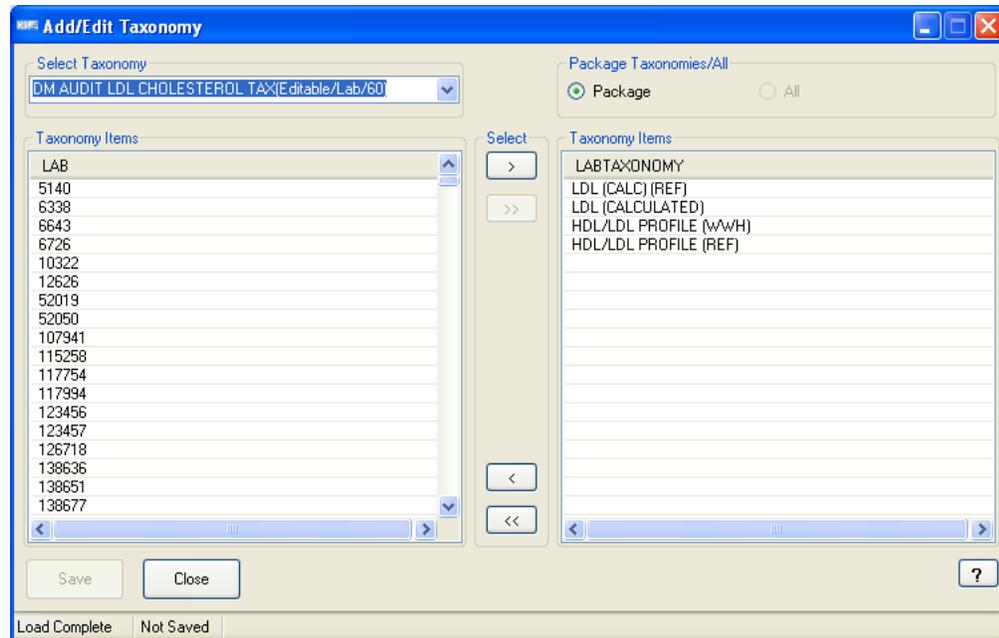


Figure 4-3: **Add/Edit Taxonomy** window

5. To add or remove items, do one of the following:
 - a. 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.
 - b. 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**.

4.2.1.1 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 International Classification of Diseases, Ninth Revision (ICD-9) and Current Procedural Terminology (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:

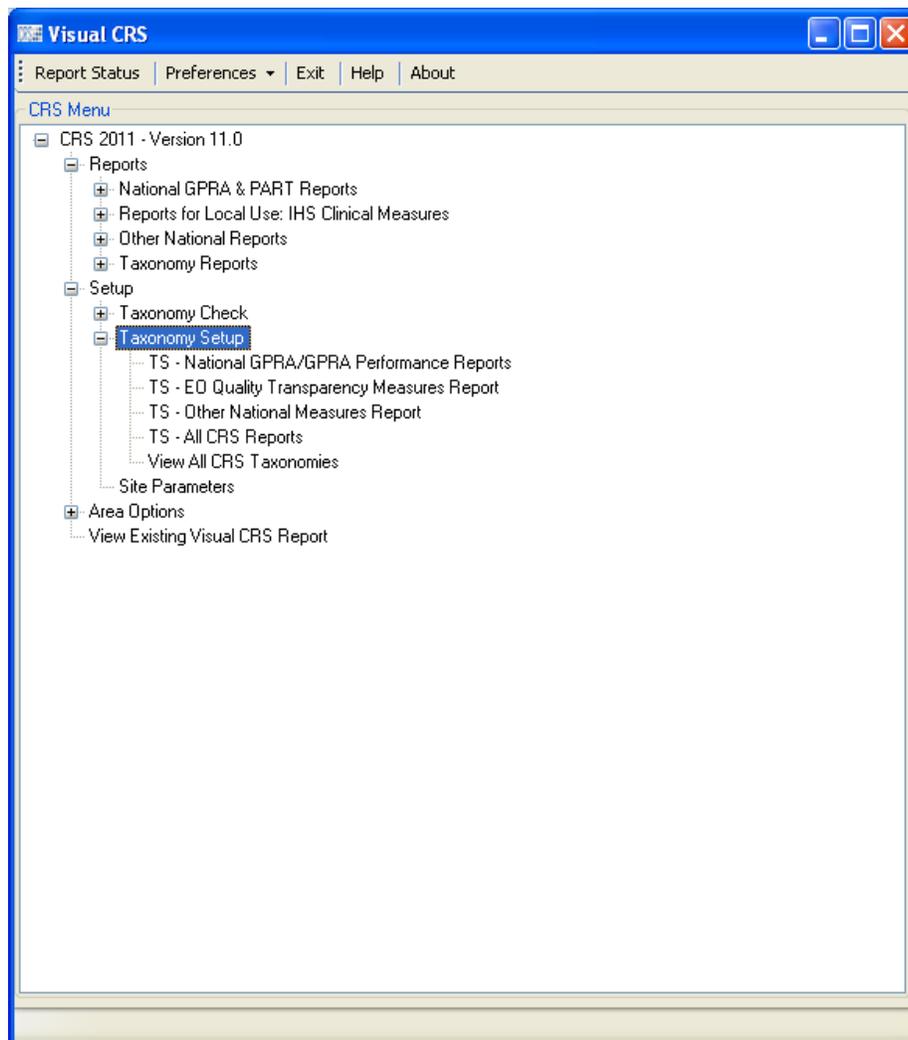


Figure 4-4: Taxonomy Setup menu options

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.

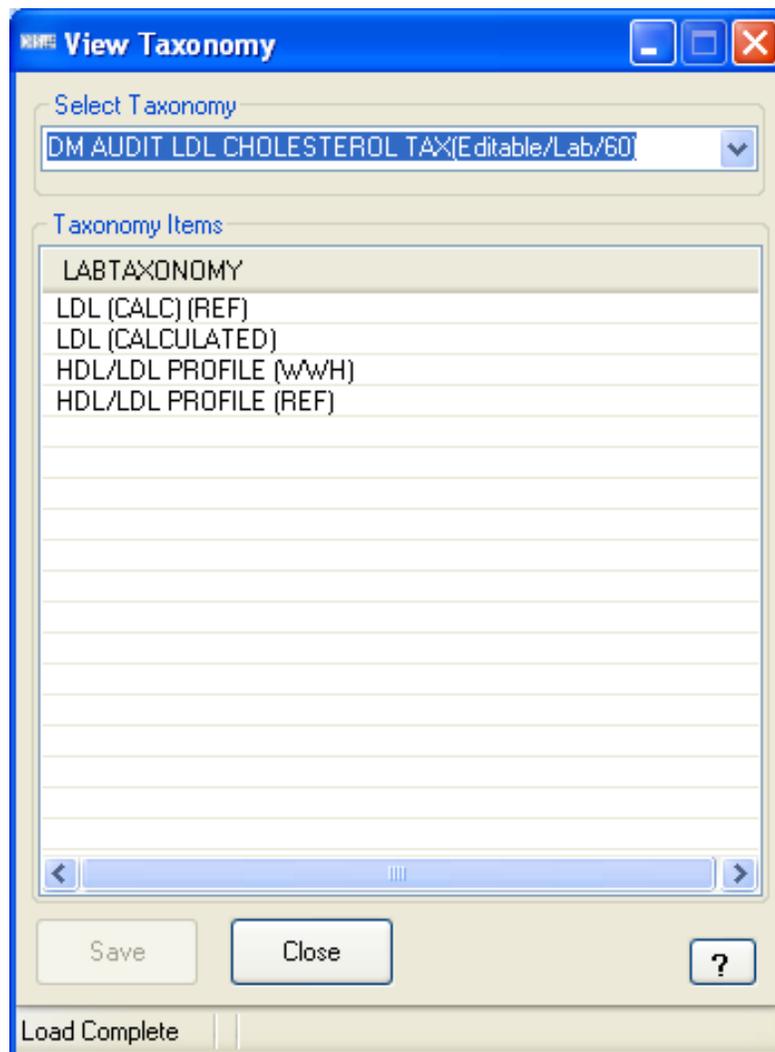


Figure 4-5: **View Taxonomy** window

4.3 Updating the Demo/Test Patient Search Template

Updating the Demo/Test Patient Search Template has been removed from the CRS Version 11.0; CRS will use the RPMS Demo/Test Patient Search Template (**DPST** option located in the PCC Management Reports, Other section) in its place. This option is still available for previous released versions of CRS. For details on running this report see the Section 4.7 in the previous released CRS Version 10.0 User Manual or Section 4.3 of the previous released Visual CRS 2010 Version 10.0 user manual for additional information.

Note: See Section 4.7 in the CRS Version 11.0 User Manual for more information about the RPMS Demo/Test Patient Search Template.

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 Location
- The site's Default Community Taxonomy
- The site's Home Location
- Whether the site is a Contract Health Services- (CHS-) only site
- Whether to export height and weight data to the site's Area Office by default

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 multidivisional 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.

- [Select the location to set site parameters](#)

- [Set site parameters](#)

Note: See Section 4.2 in the CRS Version 11.0 User Manual for additional information on each of the site parameters set using this option.

4.4.1 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 multidivisional 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 multidivisional 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 4-6: **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 multidivisional database.

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

- a. *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.*
- b. *To view or edit site parameters for another site (one in the same multidivisional 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 4-7: **New or Existing Location?** message

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

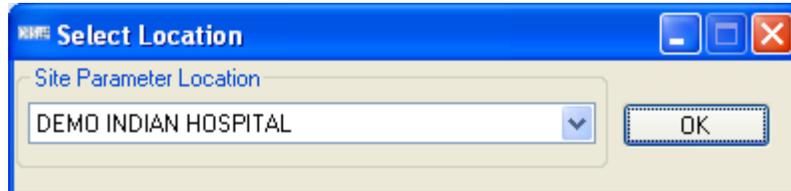


Figure 4-8: **Select Location** window

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.

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



Figure 4-9: **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 multidivisional database. Be sure to set or edit site parameters only for sites in your database.

4.4.1.1 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:

- a. To remove a taxonomy displayed in the **Default COMMUNITY Taxonomy** box, click **Clear Field**.
 - b. 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:

- a. To remove a location displayed in the **Site's Home Location** box, click **Clear Field**.
 - b. 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:
 - a. If your site offers *only* CHS services to its patients, select **Yes**.
 - b. If your site offers *any* direct services, select **No**.

Note: See Section 4.2 in the CRS Version 11.0 User Manual for information about this site parameter.

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

Note: See Section 4.2 in the CRS Version 11.0 User Manual for information about this site parameter.

6. 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.

Note: See Section 6.1 in the CRS Version 11.0 User Manual for additional information on the uploading report files.

See [About CRS file names](#) at the end of this topic for information about report file names and extensions.

5.1.1 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.

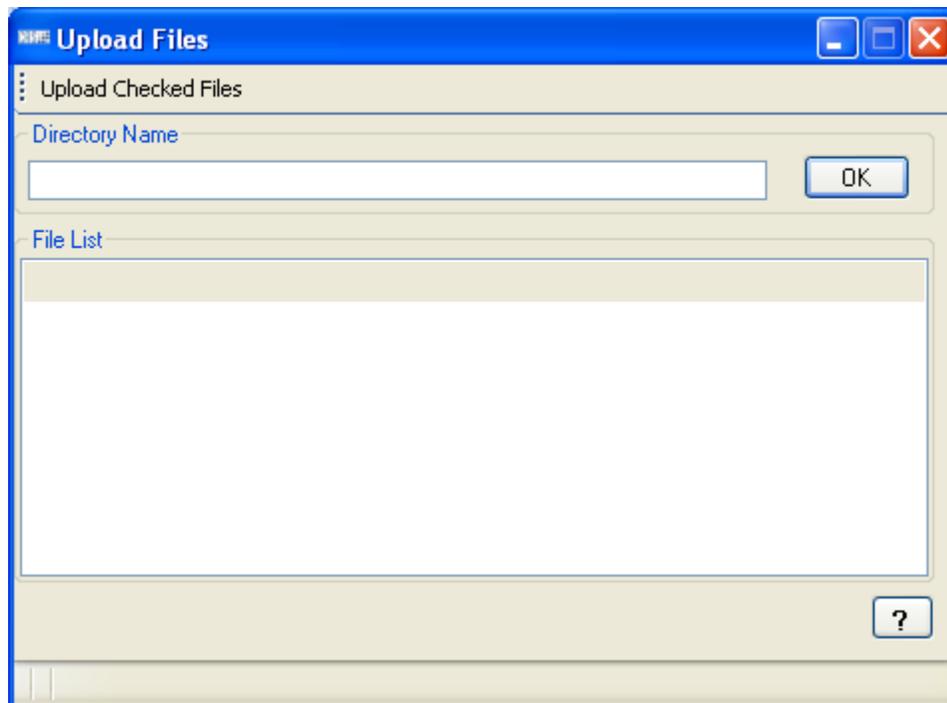


Figure 5-1: **Upload Files** window

- 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 2011 Version 11.0 will be listed in the File List pane.

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

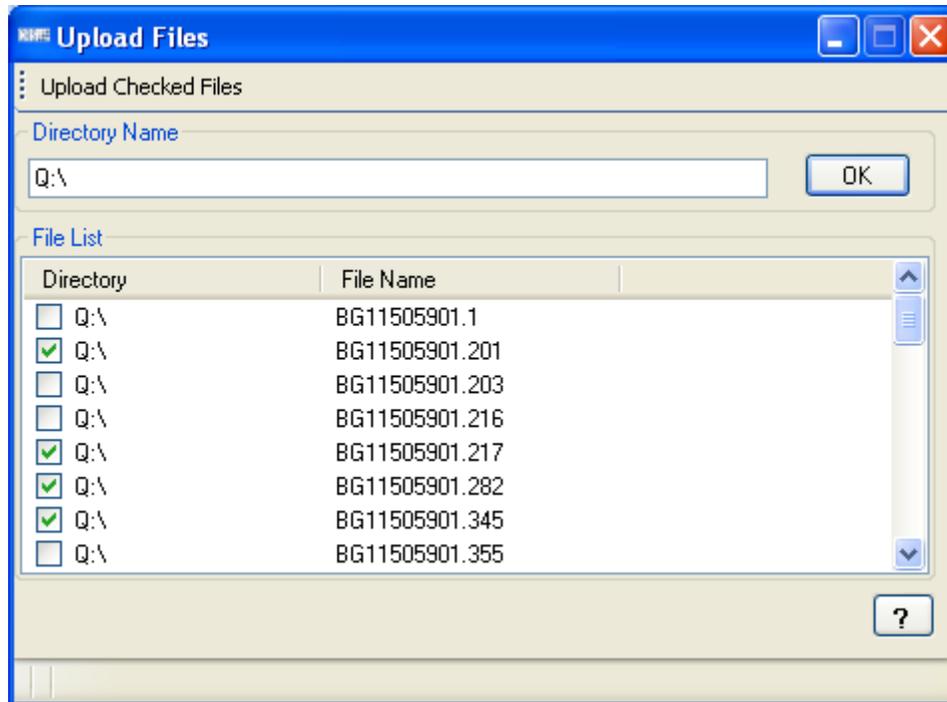


Figure 5-2: **Upload Files** window with files checked to upload

- 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.

5.1.2 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, 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 "BG11" followed by the six-digit Area Service Unit Facility (ASUFAC) code for the facility that created and transmitted the file, and ends with one of the following extensions, where:

- "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, 2010 through June 30, 2011, a baseline year of 2000, and a population of AI/AN only. These reports have only numbers in the file name extension (e.g., BG11505901.121).

5.2 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.

Note: See Section 6.2.1 in the CRS Version 11.0 User Manual for additional information on the Area National GPRA & PART Report.

5.2.1 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.

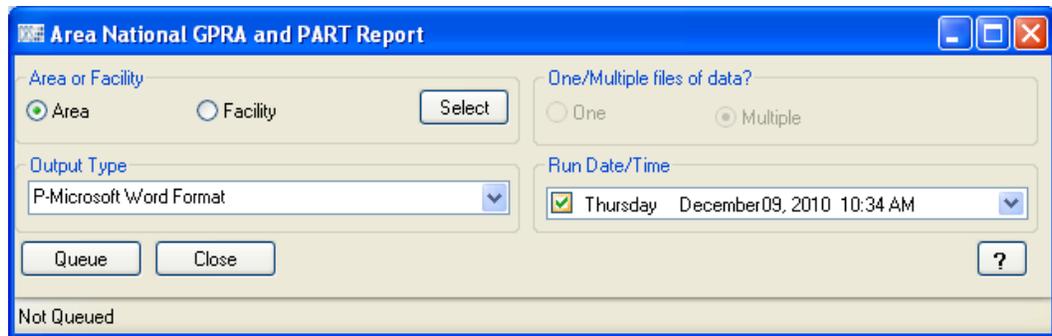


Figure 5-3: **Area National GPRA & PART Report** window

3. Under **Area or Facility**, do one of the following:
 - a. 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.
 - b. 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** 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.

Note: See Section 6.2.2 in the CRS Version 11.0 User Manual for additional information on the Area National GPRA & PART Report Performance Summaries.

5.3.1 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.

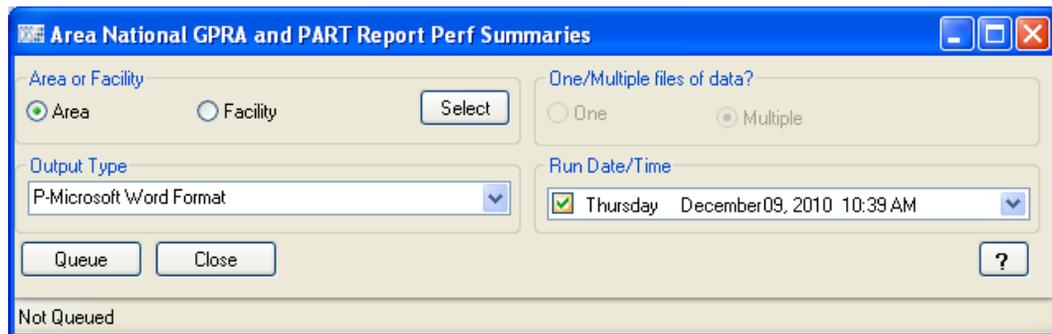


Figure 5-5: **Area National GPRA & PART Report Perf Summaries** window

3. Under **Area or Facility**, do one of the following:
 - a. 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.
 - b. 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** 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	07/01/10	06/30/11	07/01/99	06/30/00	11/23/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	11/23/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	11/23/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	11/30/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10

Below the table, there is a "Select" section with buttons: "Add", "Add All", "Delete", and "Delete All". Below that is a "Selected Items" section with a table that is currently empty. At the bottom of the window, there are buttons: "Save", "Close", and a help icon (?).

Figure 5-6: Facilities window

4. 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](#).
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](#).

5.4 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).

Note: See Section 6.2.3 in the CRS Version 11.0 User Manual for additional information on the Area GPRA & PART Performance Report.

5.4.1 Run the Area GPRA & PART Performance 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 5-7: **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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
5. Under **Area or Facility**, do one of the following:

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](#).

5.5 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.

Note: See Section 6.2.4 in the CRS Version 11.0 User Manual for additional information on the Area Other National Measures Report.

5.5.1 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 5-9: **Area Other National Measures Report** window

3. Under **Hard-coded/User-defined Report**, do one of the following:
 - a. 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](#).
 - b. 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](#).

5.5.2 Area Other National Measures Report: Hard-Coded Option

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

Figure 5-10: **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:
 - a. 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.

- b. 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** 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 5-12: **Area 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. In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
4. Under **Area or Facility**, do one of the following:
 - a. 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.
 - b. 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** 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.

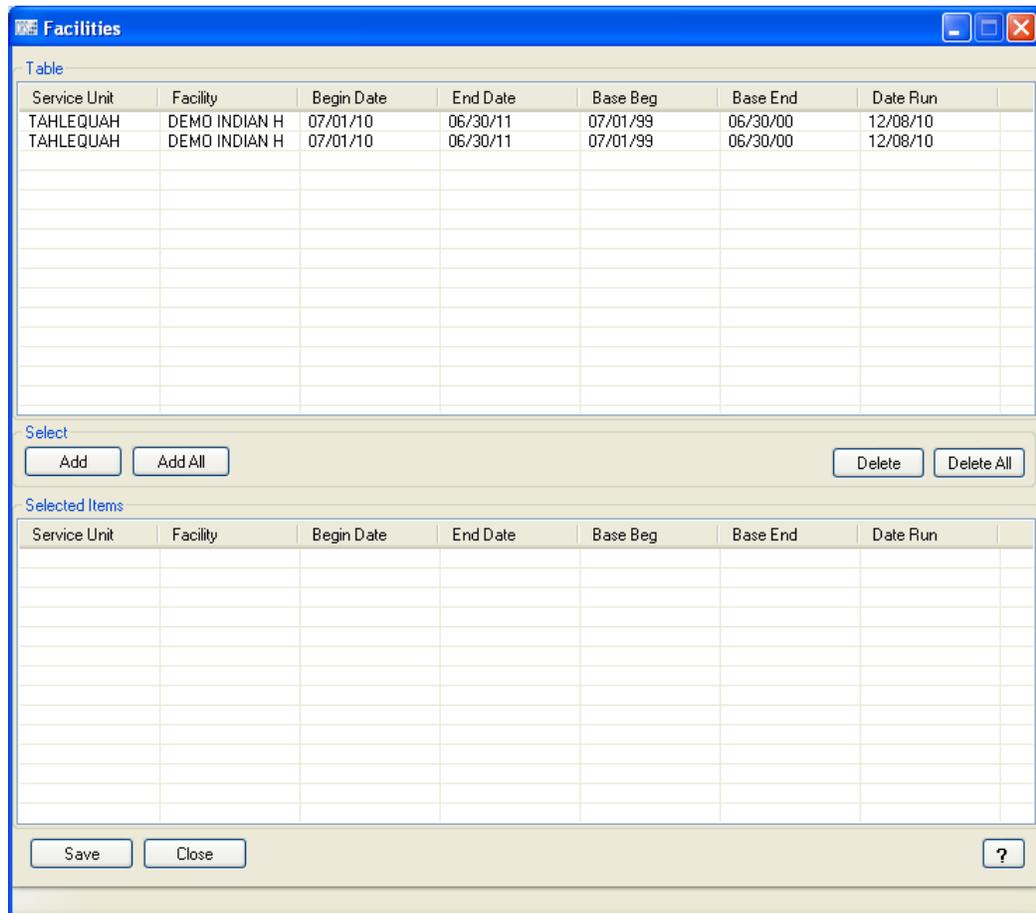


Figure 5-13: **Facilities** window

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](#).

5.6 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.

Note: See Section 6.2.5 in the CRS Version 11.0 User Manual for additional information on the Area EO Quality Transparency Measures Report.

5.6.1 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.

Figure 5-14: **Area EO Quality Transparency Measures Report** window

3. Under **Hard-coded/User-defined Report**, do one of the following:

- a. 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](#).
 - b. 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](#).

5.6.2 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 Measures Report". It features a "Hard-coded/User-defined Report" section with "Hard-coded" selected. Other sections include "Report Year" (2011), "Base Line Year" (2000), "Area or Facility" (Area selected), "Patient Type" (1-Indian/Alaska Native), "Output Type" (P-Microsoft Word Format), and "Run Date/Time" (Thursday, December 09, 2010 10:48 AM). At the bottom, there are "Queue" and "Close" buttons, and a help icon.

Figure 5-15: **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:
 - a. 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.

- b. 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** 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.

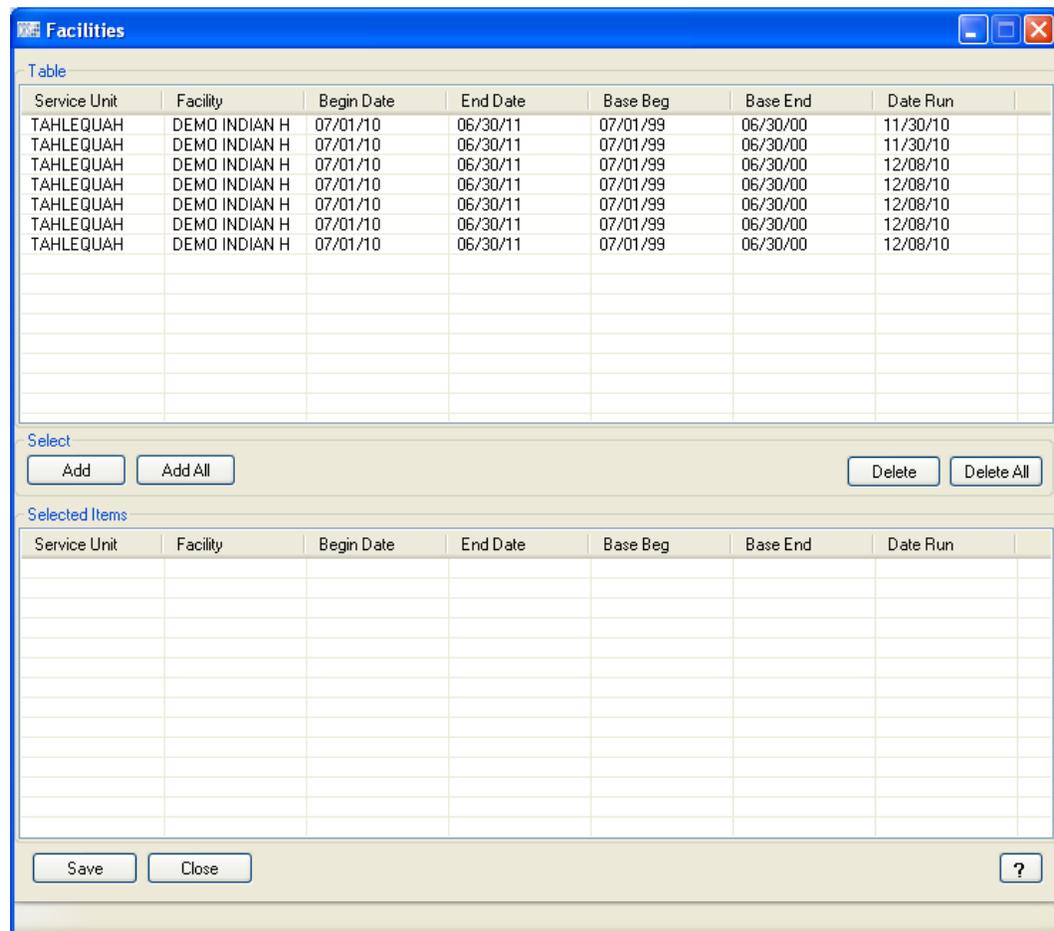


Figure 5-16: **Facilities** window

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](#).

5.6.3 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 5-17: **Area EO Quality Transparency 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](#).
- In the **Patient Type** list, select one of the following beneficiary populations to report on:
 - 1-Indian/Alaska Native** (Classification 01)

- b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
4. Under **Area or Facility**, do one of the following:
- a. 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.

- b. 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** 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.

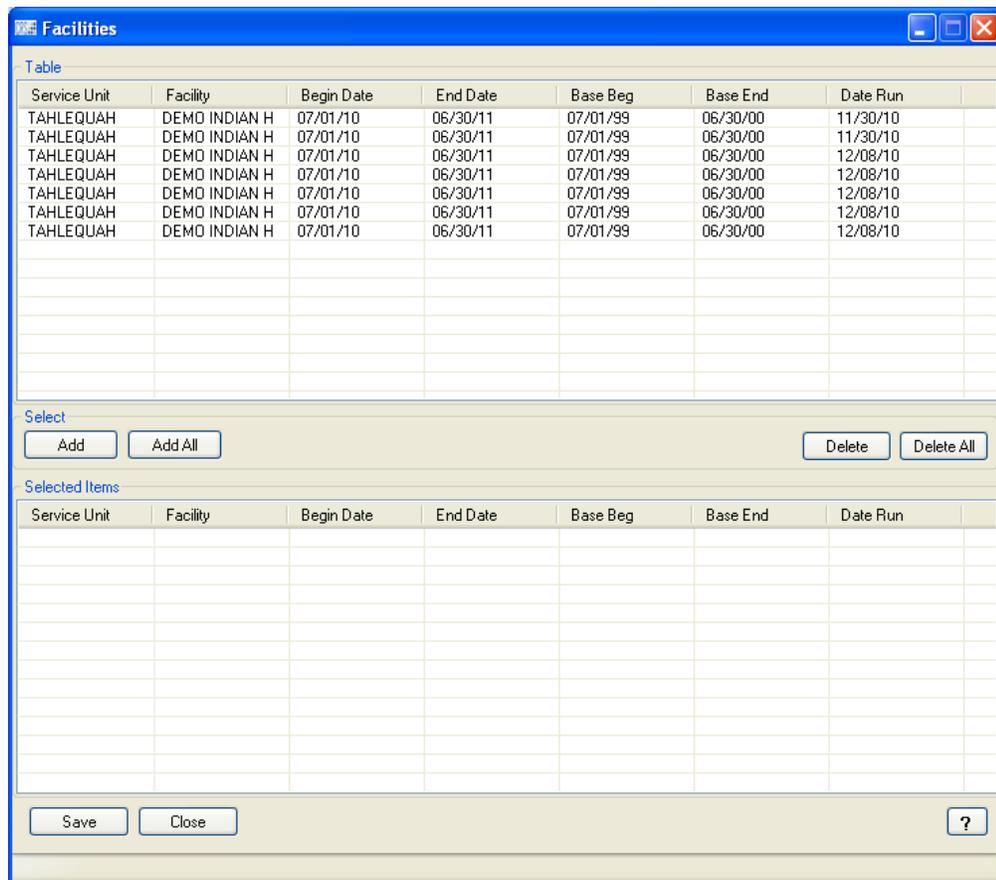


Figure 5-18: **Facilities** window

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](#).

5.7 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.

Note: See Section 6.2.6 in the CRS Version 11.0 User Manual for additional information on the Area Elder Care Report.

5.7.1 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.

Figure 5-19: 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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
5. Under **Area or Facility**, do one of the following:
 - a. 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.
 - b. 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** 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 the 'Facilities' window with the following data in the 'Table' section:

Service Unit	Facility	Begin Date	End Date	Base Beg	Base End	Date Run
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10

The 'Selected Items' table is currently empty.

Figure 5-20: **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](#).

5.8 Area HEDIS Report

The area aggregate Healthcare Effectiveness Data and Information Set (HEDIS) Performance Report has been removed from the CRS Version 11.0. This report is still available for previous released versions of CRS. For details on running this report see the Section 6.2.7 in the previous released CRS Version 10.0 User Manual or Section 5.8 of the previous released Visual CRS 2010 Version 10.0 user manual for additional information.

5.9 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.

Note: See Section 6.2.8 in the CRS Version 11.0 User Manual for additional information on the Area Patient Education Report with Community Specified.

5.9.1 Run the Area Patient Education Report with Community Specified

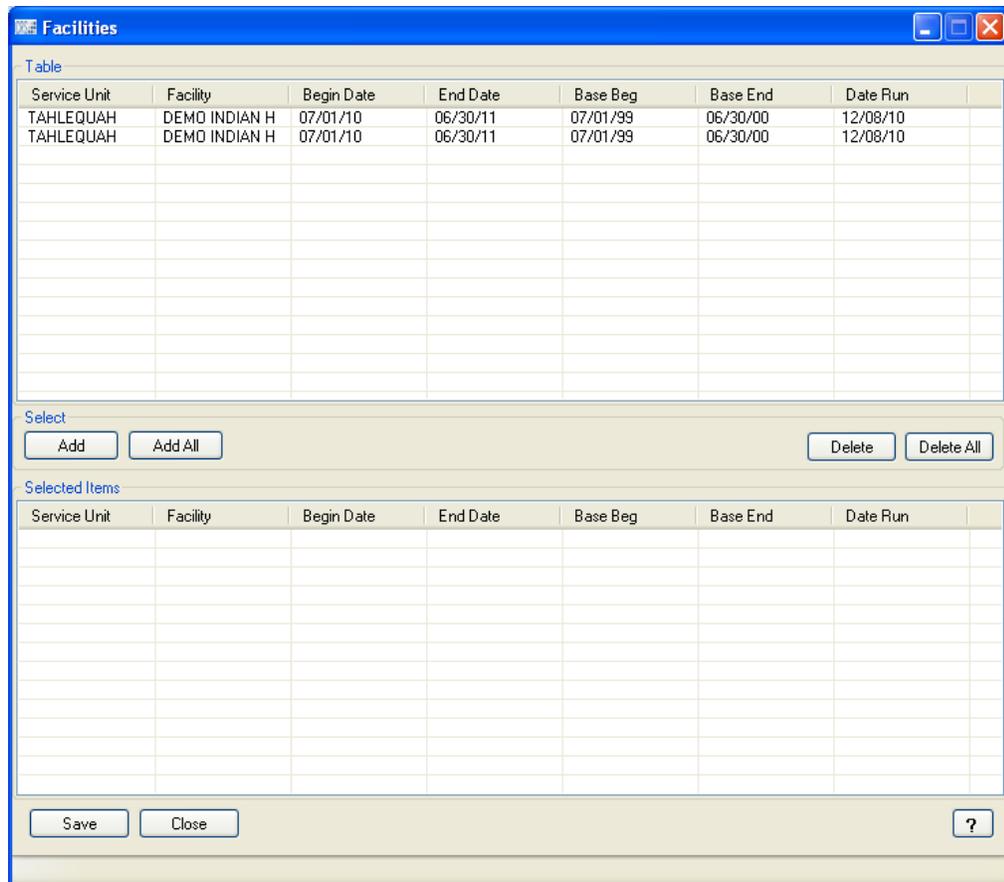
1. Expand the Area Options folder to display the list of available area reports.
2. Click the **Area Patient Education Report w/Community Specified** option to display the **Area Patient Education Report** window.

Figure 5-21: 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:
 - a. **1–Indian/Alaska Native** (Classification 01)
 - b. **2–Not Indian Alaskan/Native** (Not Classification 01)
 - c. **3–All** (Both Indian/Alaska Natives and Non-01)
5. Under **Area or Facility**, do one of the following:
 - a. 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.
 - b. 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** 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

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 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.

Note: See Section 6.2.9 in the CRS Version 11.0 User Manual for additional information on the Area Height and Weight Data File.

5.10.1 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.

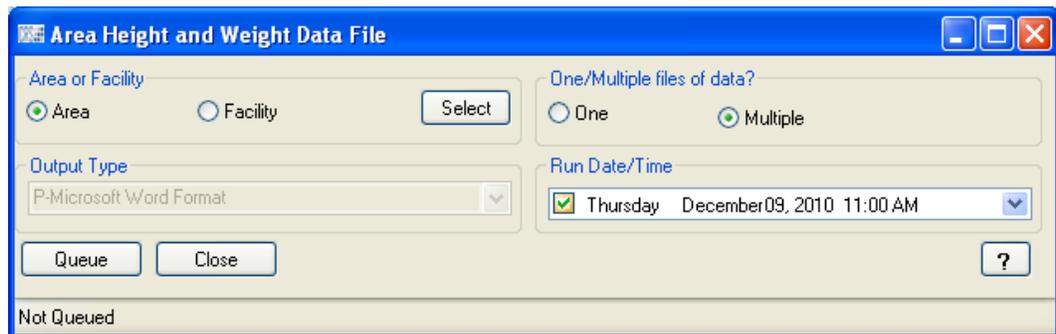


Figure 5-23: **Area Height and Weight Data File** window

3. Under **Area or Facility**, do one of the following:
 - a. 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.
 - b. 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** 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.

Service Unit	Facility	Begin Date	End Date	Base Beg	Base End	Date Run
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	11/23/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	11/23/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	11/23/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	11/30/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10
TAHLEQUAH	DEMO INDIAN H	07/01/10	06/30/11	07/01/99	06/30/00	12/08/10

Figure 5-24: Facilities window

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

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

The last 10 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 2011

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

Creating or Selecting a Demo/Test Patient Search has been removed from the CRS Version 11.0; CRS will use the RPMS Demo/Test Patient Search Template (**DPST** option located in the PCC Management Reports, Other section) in its place. This option is still available for previous released versions of CRS. For details on running this report see the Section 4.7 in the previous released CRS Version 10.0 User Manual or Section 4.3 of the previous released Visual CRS 2010 Version 10.0 user manual for additional information.

If your RPMS Demo/Test Patient Search Template does not contain any patients you will receive the following pop-up message when initiating a report.

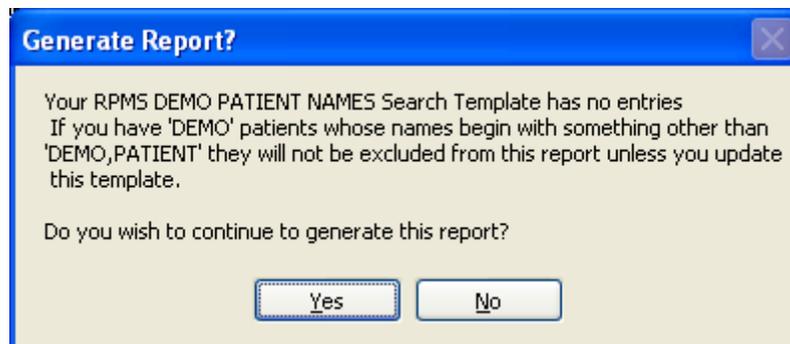


Figure 6-1: Generate Report message

Note: This pop-up message can be eliminated by adding a patient(s) to your RPMS Demo/Test Patient Search Template. See Section 4.7 in the CRS Version 11.0 User Manual for more information about the RPMS Demo/Test Patient Search Template.

6.2 Filtering Lists

Some CRS report options allow you to select clinics, 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.

6.2.1 Filter a List of Clinics, 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.

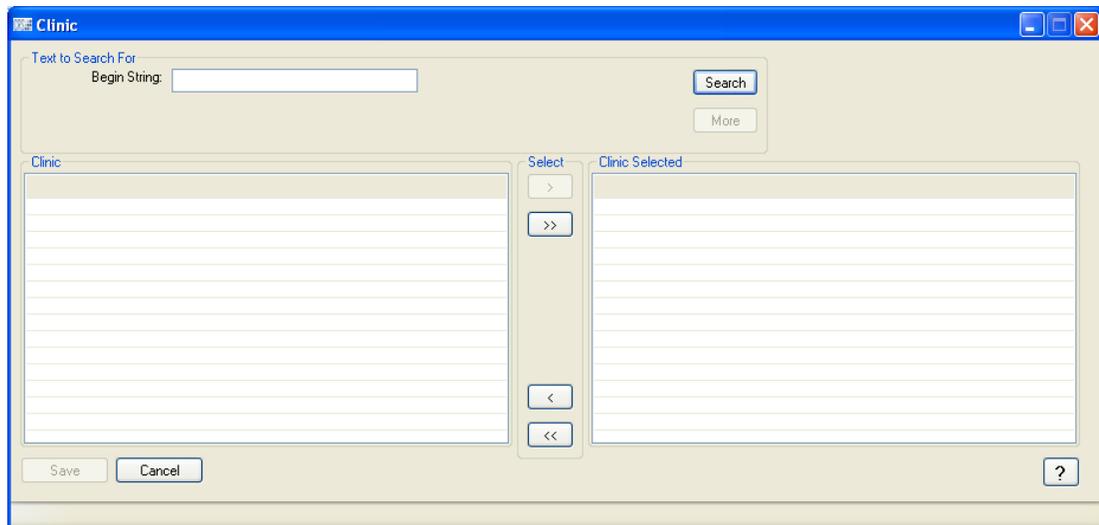


Figure 6-2: Text boxes for filtering lists

To filter the list, follow these steps:

1. Use one of the filtering options below.
2. Click **Search**.
3. 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.)

6.2.2 Filtering Options

- To display all the items in the list, leave the **Begin String** box blank.

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

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

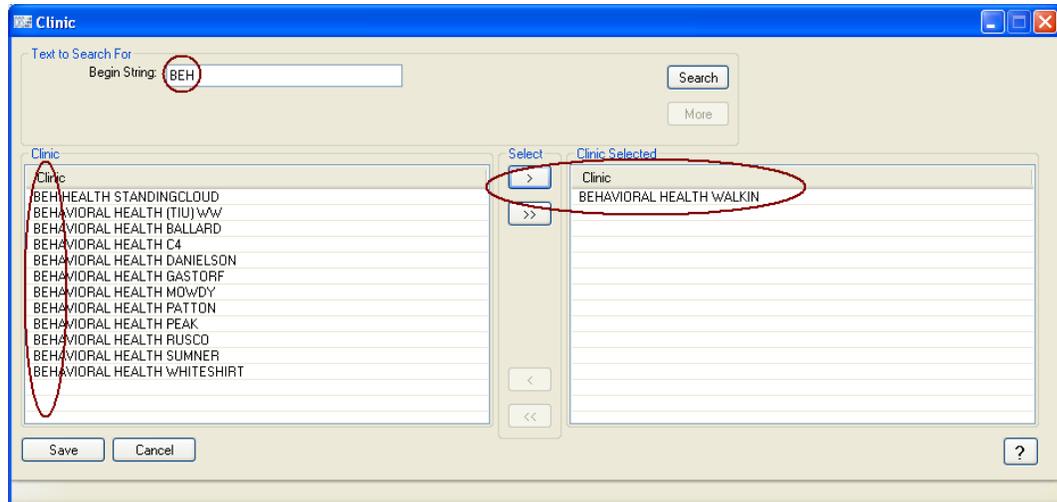


Figure 6-3: Displaying items beginning with a string

- 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. Letters in the **Begin String** box will be *included* in the filtered list.
- When you have selected the clinic(s) for the report, click **Save** to close the window and save the clinic selection.

To close the **Clinic** window without saving your selection. At the Unsaved pop-up message, click “**Yes**” to close the window, “**No**” to return to the **Clinic** window.



Figure 6-4: **Unsaved** pop-up message window

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.

Note: See Section 4.1 in the CRS Version 11.0 User Manual for more information about community taxonomies and using Q-Man to define them.

6.3.1 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.

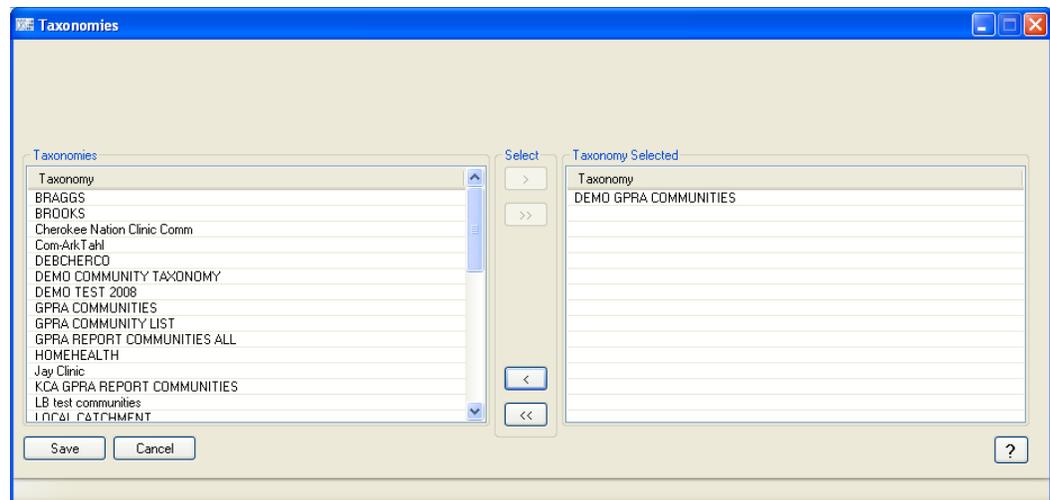


Figure 6-5: **Taxonomies** window

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, 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 **Cancel**. At the Unsaved pop-up message, click “**Yes**” to close the window, “**No**” to return to the **Taxonomies** window.



Figure 6-6: **Unsaved** pop-up message window

6.4 Selecting a Hospital

The CMS Performance Report allows you to specify a hospital whose patients will be included in the report which has been removed from the CRS Version 11.0. This report is still available for previous released versions of CRS. For details on running this report see the Section 5.12 in the previous released CRS Version 10.0 User Manual or Section 6.4 of the previous released Visual CRS 2010 Version 10.0 user manual for additional information on Selecting a Hospital.

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.

6.5.1 Select a Location

1. To select a location, click **Select Location** next to the **Location** box or the **Site's Home Location** box to display the **Locations** window.

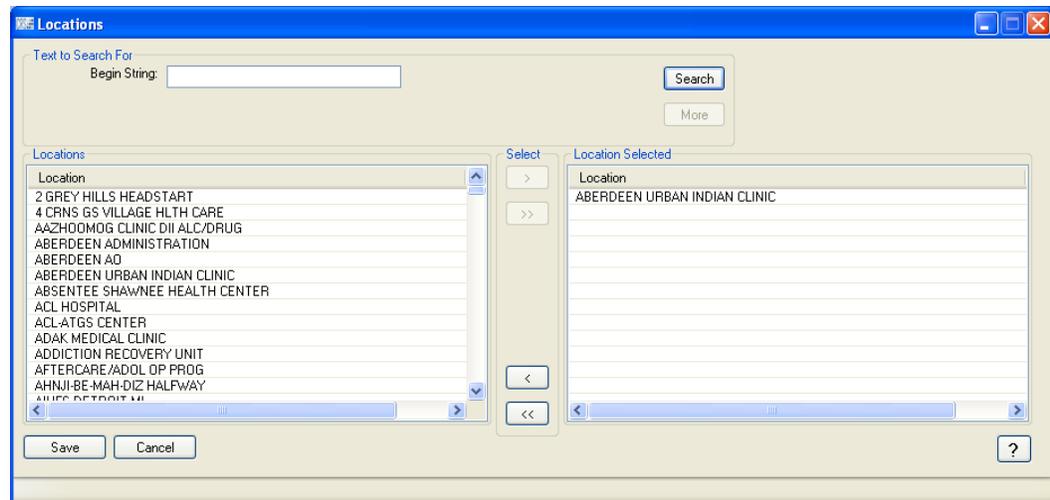


Figure 6-7: **Locations** window

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** box 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. Click **Search**.
 - c. 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, then click < to move it back to the **Locations** list.

- 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 **Cancel**. At the **Unsaved** pop-up message, click “**Yes**” to close the window, “**No**” to return to the **Locations** window.

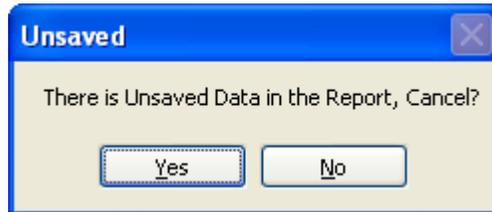


Figure 6-8: **Unsaved** pop-up message window

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.

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

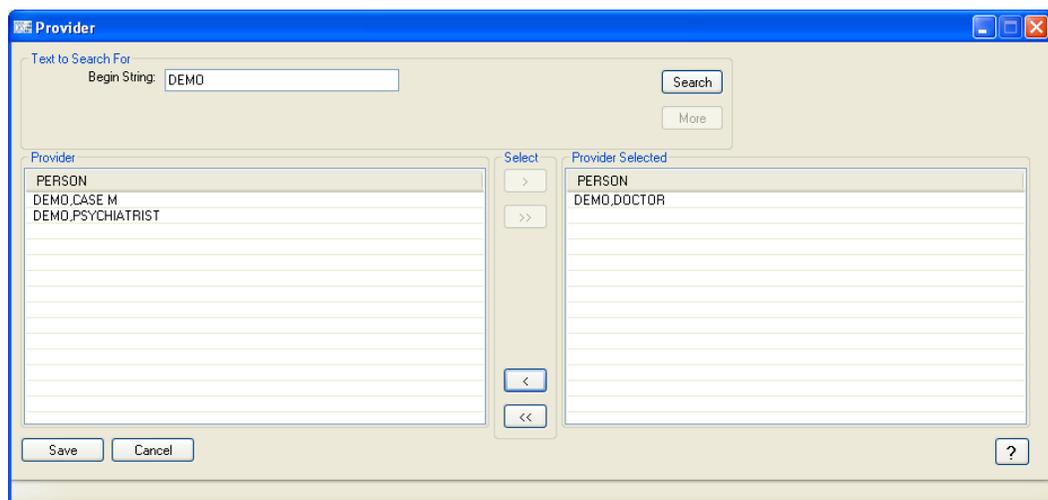


Figure 6-9: **Provider** window

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 the **Begin String** box 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. Click **Search**.
 - c. 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, 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 **Cancel**. At the **Unsaved** pop-up message, click “**Yes**” to close the window, “**No**” to return to the **Provider** window.



Figure 6-10: **Unsaved** pop-up message window

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.

See Section 5.7 in the CRS Version 11.0 User Manual for more information about creating search templates.

6.7.1 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.

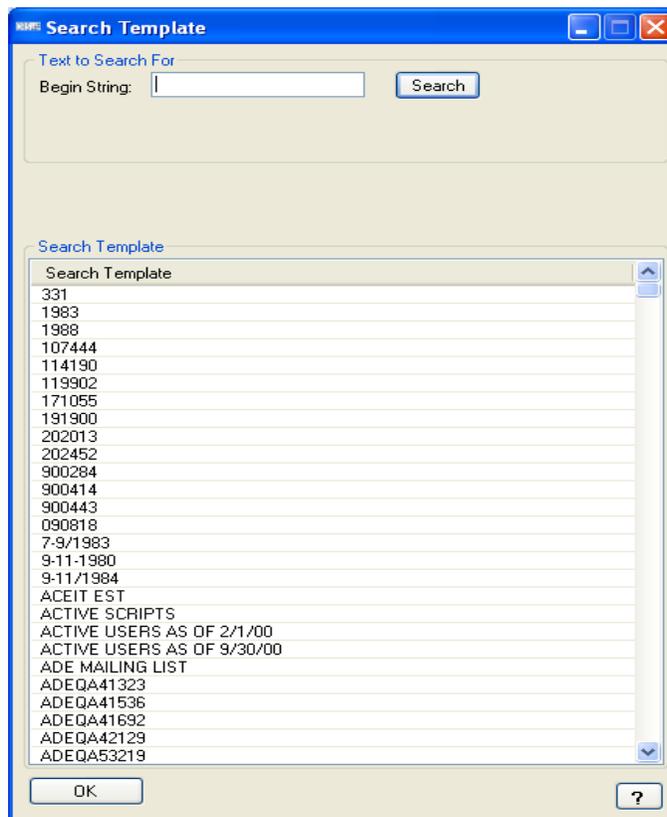


Figure 6-11: Search Template window

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 **Cancel**. At the **Unsaved** pop-up message, click “**Yes**” to close the window, “**No**” to return to the **Search Template** window.

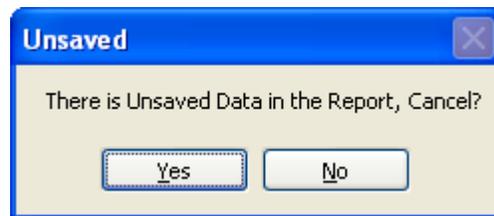


Figure 6-12: **Unsaved** pop-up message window

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.

See Section 5.7 in the CRS Version 11.0 User Manual for more information about creating search templates.

6.8.1 Select a Search Template

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

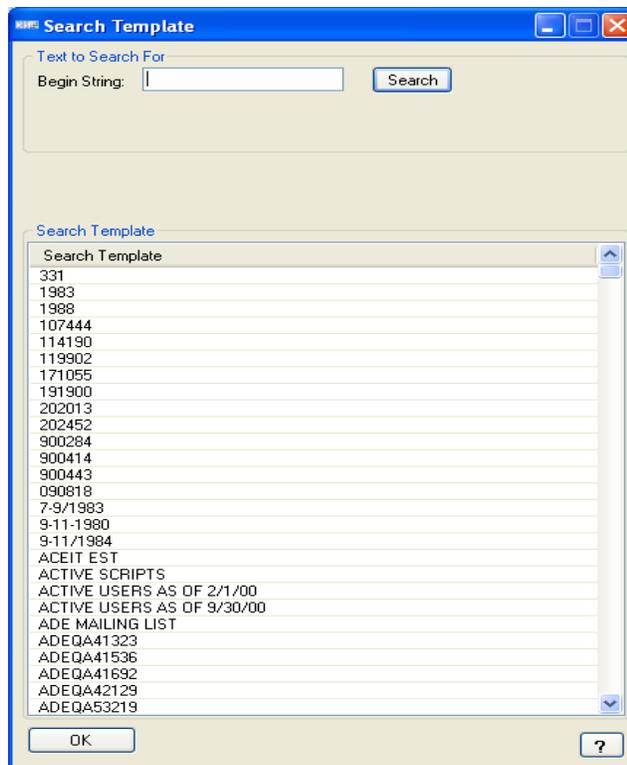


Figure 6-13: **Search Template** window

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

2. To locate a search template, do one of the following:
 - a. Scroll through the list to locate the template you want to use.
 - b. 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

Demo/Test Patient Search Template has been removed from the CRS Version 11.0; CRS will use the RPMS Demo/Test Patient Search Template (**DPST** option located in the PCC Management Reports, Other section) in its place. This option is still available for previous released versions of CRS. For details on running this report see the Section 4.7 in the previous released CRS Version 10.0 User Manual or Section 4.3 of the previous released Visual CRS 2010 Version 10.0 user manual for additional information.

Note: See Section 4.7 in the CRS Version 11.0 User Manual for more information about the RPMS Demo/Test Patient Search Template.

6.10 Selecting Clinics

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

6.10.1 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.

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

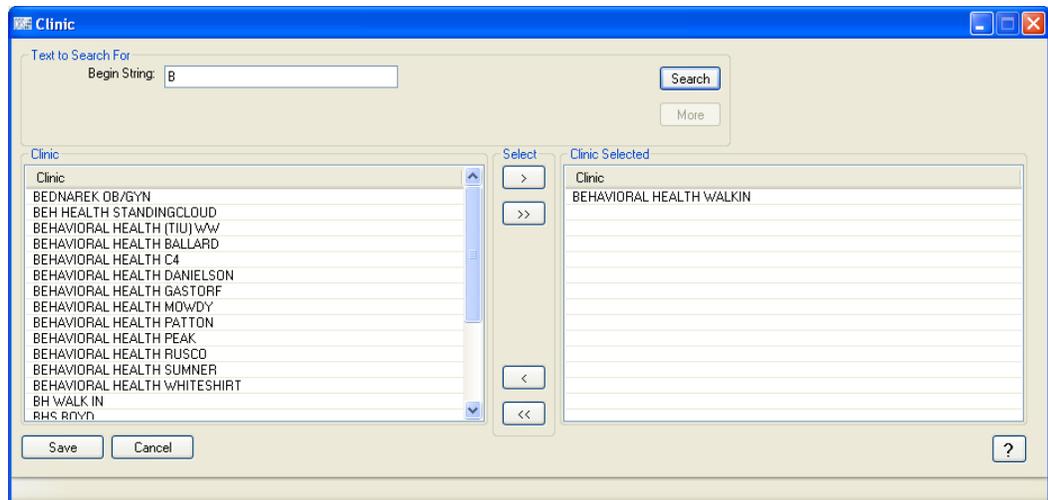


Figure 6-14: **Clinic** window

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 the **Begin String** box 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. Click **Search**.
 - c. 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.
 - a. 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 >>.

- b. 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 **Cancel**. At the **Unsaved** pop-up message, click **Yes** to close the window, **No** to return to the **Clinic** window.

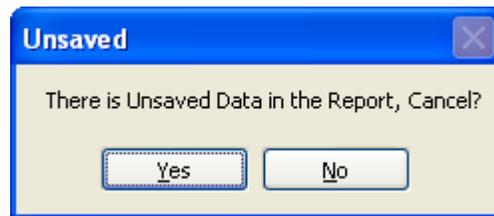


Figure 6-15: **Unsaved** pop-up message window

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.

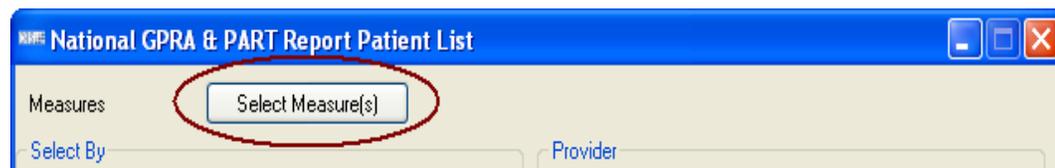


Figure 6-16: **Select Measure(s)** button

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

6.11.1 Select Measures and Patient Lists

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

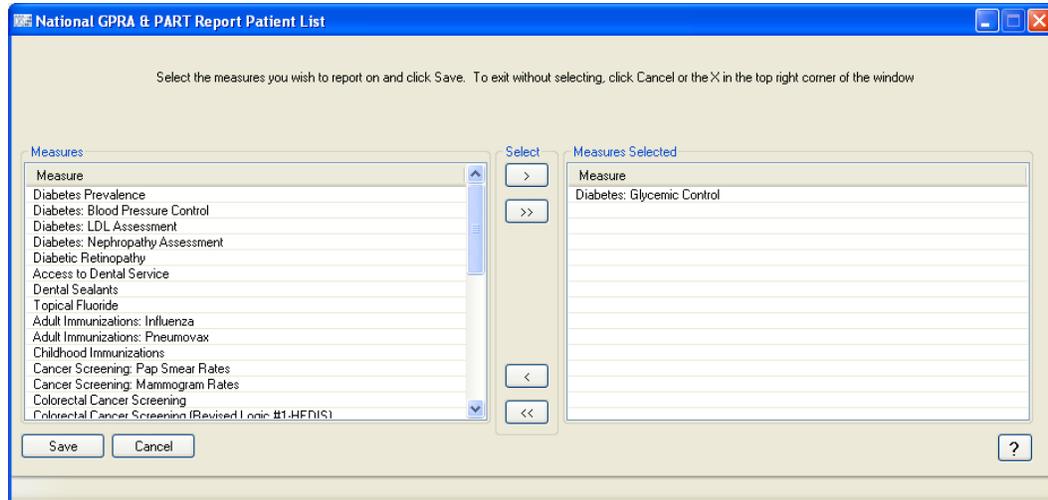


Figure 6-17: **Measures** window

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.
 - a. 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 >>.
 - b. 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:

- a. To close the **Measures** window without saving your selection, click **Cancel**. At the **Unsaved** pop-up message, click **Yes** to close the window, **No** to return to the **Patient List** window.



Figure 6-18: **Unsaved** pop-up message window

- b. To save the selected measures, close the window, and display the **Sub-Measures** message box, click **Save**.



Figure 6-19: **Sub-Measures** message box

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

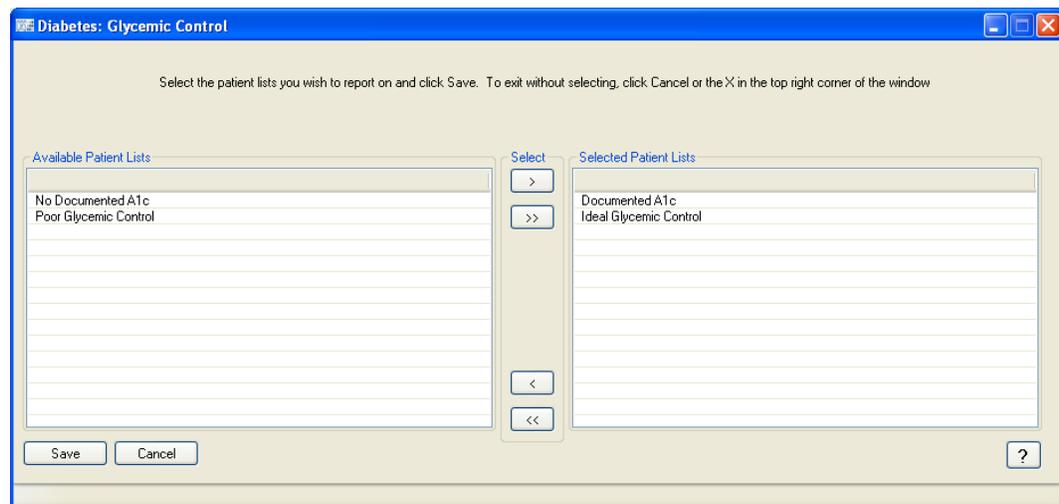


Figure 6-20: **Patient List** window

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:
 - a. 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.
 - b. To close a patient list window without selecting patient lists, click **Cancel**. At the Unsaved pop-up message, click **Yes** to close the window, **No** to return to the **Patient List** window. Patient lists selected in this window will not be saved.

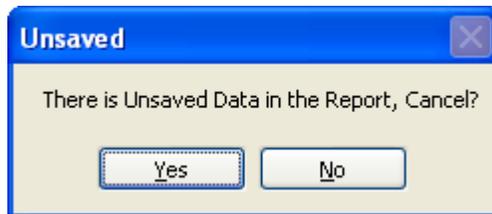


Figure 6-21: **Unsaved** pop-up message window

- c. If you selected more than one performance measure in Step 2, clicking **Cancel** will return to the report definition window.

6.12 Selecting Multiple Patients

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

6.12.1 Select Multiple Patients

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

Type Patient Name: (Last Name, First or SSN or HRCN or DOB (MM/DD/YYYY))

Matches: ALL

Display

Patient List

Patient Name	SSN	Chart #	DOB	IEN	Sex
ACKER, CHERYL LEA	789454342	183280	Oct 13, 1978	101683	F
ACKER, LAURA SUE	425883950	125085	Sep 16, 1987	43328	F
ACKERMAN, ALEXANDER LEE	499439459	126773	Mar 10, 1916	45023	M
ACKERMAN, ASHLEE CECILIA	678618798	110235	Apr 18, 1947	9092	F
ACKERMAN, JESSICA LYNN	660758338	189674	Nov 04, 1998	108083	F
ACKERMAN, JEWELL DEAN	750160564	153118	Aug 17, 1935	71463	F
ACKERMAN, KALEA JACKIE LOU	267379485	132162	Sep 17, 1969	50442	F
ACKERMAN, LACEY DAWN	392077573	115015	Feb 22, 1938	33220	F
ACKERMAN, SUSANNA	115414125	170354	Feb 01, 1967	88752	F
ACKLEY, AARON RAY	390941916	101703	Jul 18, 1964	19919	M
ACKLEY, RAYLEIGH DANIELLE	212997		Mar 17, 2004	131432	F

Add Add All Delete Delete All

Patients Selected

Patient Name	SSN	Chart #	DOB	IEN
--------------	-----	---------	-----	-----

Save Clear Cancel ?

13 Record(s) Found

Figure 6-22: **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:
- a. Click one or more patient names in the **Patient List** pane to highlight them, and then click **Add** 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** 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** 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.
- a. To close the **Multiple Patient Select** window without saving your selection, click  at the top right corner of the window. At the **Unsaved** pop-up message, click **Yes** to close the window, **No** to return to the **Patient List** window. Patient lists selected in this window will not be saved.



Figure 6-23: **Unsaved** pop-up message 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 Lists** button in the **Report Definition** window, as shown below.

Figure 6-24: Patient list options with **Select Lists** button

The **Do you want Patient List** option buttons and **Select Lists** 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 Lists** to display the **Patient List Measures** window.

Figure 6-25: **Patient List** 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.

- a. 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 >>.
 - b. 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 <<.
3. When you have selected the measures to include in the report, click **Save** to close the window and save the selected measures.
 - a. To close the **Patient List Measures** window without saving your selection, click **Cancel**. At the **Unsaved** pop-up message, click “**Yes**” to close the window, “**No**” to return to the **Patient List Measures** window. Patient lists selected in this window will not be saved.



Figure 6-26: **Unsaved** pop-up message window

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 6-27: **Measures** options and **Select** button

- A drop-down list with the **Selected Measures (User Defined)** option and a **Select** button, as shown below

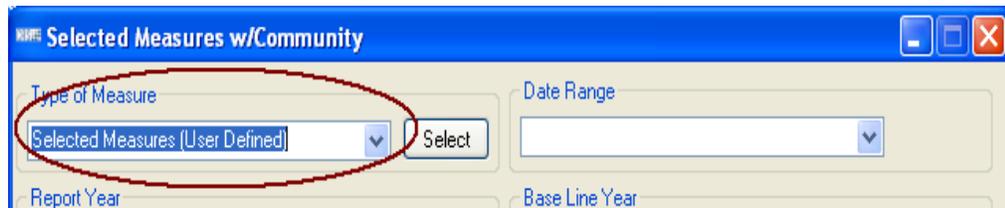


Figure 6-28: **Selected Measures (User Defined)** option and **Select** button

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](#).

6.14.1 Select Performance Measures

1. Click the **Select** button next to the **Selected** option radio button under **Measures**, or Click the **Select** button next to **Selected Measures (User Defined)** in the **Type of Measure** drop-down list, to display the **Measures** window.

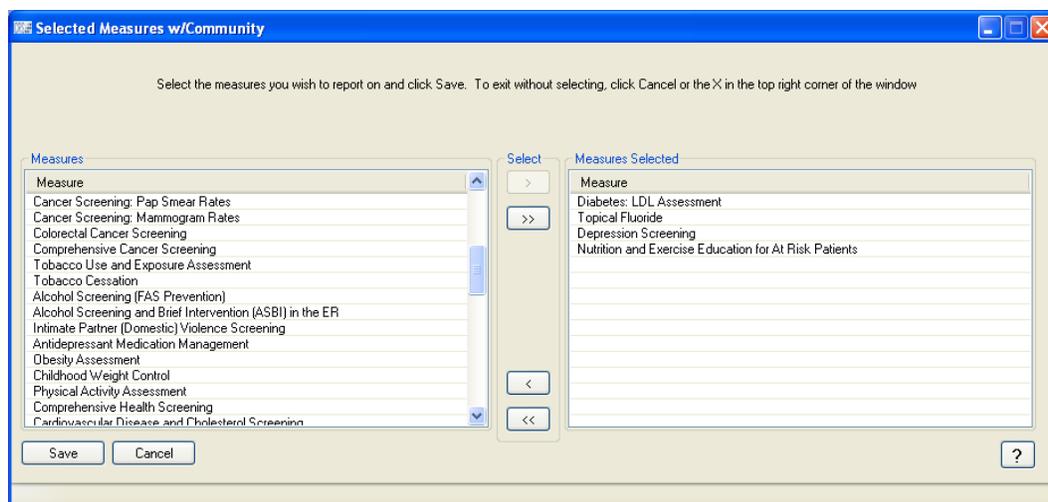


Figure 6-29: **Measures** window

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.
 - a. 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 >>.
 - b. 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.
 - a. To close the **Measures** window without saving your selection, click **Cancel** or click the  in the top right corner. At the **Unsaved** pop-up message, click **Yes** to close the window, **No** to return to the **Patient List** window. Patient lists selected in this window will not be saved.



Figure 6-30: **Unsaved** pop-up message window

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.
 - a. 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).
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, 2010 through June 30, 2011, 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:
 - a. Type the year of the report end date.
 - b. 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:
 - a. Type the year of the baseline end date.

- b. 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 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:
 - a. 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.
 - b. 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:
 - a. Type the year of the baseline end date.
 - b. 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.

6.17 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.

6.17.1 Select Report Output Options



Figure 6-31: Report output options

1. In the **Output Type** list, select one of the following:
 - a. **P-Microsoft Word Format** to create a Microsoft Word document that can be printed or viewed on the screen.

- b. **D-Microsoft Excel Format** to create a delimited file that can be opened in Microsoft Excel.
 - c. **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:
 - a. 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.
 - b. 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.
4. To view the report, follow the instructions in [Viewing a Completed or Queued Report](#).

6.18 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	Type of Output	Export File(s)
<input type="checkbox"/> 2011ONMHCEXportFileRpt	ROZSNYAJ.DUANE	Dec 08, 2010@14:19	Dec 08, 2010@14:22:03	CRS 11 OTHER NATIONAL...	COMPLETED	Microsoft Word Format	BG11505901.ONM412 in directo
<input type="checkbox"/> 2011EDHCRpt	ROZSNYAJ.DUANE	Dec 08, 2010@14:17	Dec 08, 2010@14:18:43	CRS 11 ED REPORT	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011ELD CareRpt	ROZSNYAJ.DUANE	Dec 08, 2010@14:17	Dec 08, 2010@14:19:01	CRS 11 ELDER CARE RE...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011GPRAFForecastRpt	ROZSNYAJ.DUANE	Dec 08, 2010@14:17	Dec 08, 2010@14:19:22	CRS 11 PATIENT FOREC...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011GPRAFAPARTPtsRpt	ROZSNYAJ.DUANE	Dec 08, 2010@14:16	Dec 08, 2010@14:18:11	CRS 11 NATIONAL PATIE...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011ONMHCRpt	ROZSNYAJ.DUANE	Dec 08, 2010@14:16	Dec 08, 2010@14:20:02	CRS 11 OTHER NATIONAL...	COMPLETED	Microsoft Word Format	
<input type="checkbox"/> 2011CRPARABTRpt	ROZSNYAJ.DUANE	Dec 08, 2010@14:15	Dec 08, 2010@14:20:22	CRS 11 NATIONAL GPR...	COMPLETED	Microsoft Word Format	

Figure 6-32: **Report Status Check** window

1. If the **Report Status** column for a report contains “COMPLETED,” do one of the following to open the report file.
 - a. Double click the COMPLETED report to be opened.
 - b. Highlight the COMPLETED report to be opened and hit the enter key.
 - c. Check the COMPLETED report(s) to be opened then click **Open Checked Reports** at the top of the window.
2. If the **Yes** option for **Export to Area?** was selected in the report, the files exported will be displayed in the Export File(s) column.

3. If the **Report Status** column contains “RUNNING,” the report is either currently being created or is queued to run at a later time.

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