RESOURCE AND PATIENT MANAGEMENT SYSTEM

Clinical Reporting System

(BGP)

Visual CRS User Manual

Version 17.1
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Office of Information Technology
Division of Information Technology

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Preface

This user manual provides instructions for using Visual Clinical Reporting System (CRS) 2017–Version 17.1.

The contents of this manual are organized by subject matter, with sections and pages corresponding to the Visual CRS v17.1 menu folders and options.

- 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 17.1 User Manual*.
- For sample output and information on the logic used for each performance measure, refer to the *CRS Version 17.1 Clinical Performance Measure Logic Manual*.
- For information on installing the Visual CRS 2017 GUI on your Resource and Patient Management System server and client PC, refer to the *CRS Version 17.1 Installation Guide*.

Note to Content Contributors and Editors:

The section cross-references in this manual do not fully conform to the guidance provided in the *OIT-SAC Documentation Style Guide*, which mandates that section cross-references include the Section number only; not the Section title. For example:

Section 2.2.1.

Because the contents of this manual are used to update the online Help system, which does not use section numbers, the Section title is included with each section cross-reference. For example:

Section 2.2.1, Reports.

This enhanced cross-reference format eases text identification for hyperlink creation in the online Help system.

1.0 Welcome to Visual CRS

Visual Clinical Reporting System (CRS) 2017 is a graphical user interface (GUI) version of the CRS, Version 17.1 for FY 2017 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 17.1 including setting up site parameters and taxonomies, running reports and patient lists at the facility level, and running reports at the Area Office level.

For information on using the Visual CRS main window, see Section 2.0, The Visual CRS Main Window.

The contents of this manual can be accessed from the Visual CRS 2017 application through the **Help** menu:

- To view the Help topics in a chapter, double-click the chapter icon (- an icon having the shape of a book) or the chapter name in the Help **Contents** pane.
- To view the Help topic for a specific report, do one of the following:
  - On the **CRS** ribbon, click Help (- a small button displaying a circle containing a question mark).
  - In the **Report** pane, click **Help**.
  - In the Help **Contents** pane, select the report name.
- To return to a previously viewed Help topic, click the **Back** button at the top of the **Help** window.
- To exit Visual CRS 2017 Help, click Close Window (- a small button containing a graphical X) in the top right corner of the **Help** window.

2.0 The Visual CRS Main Window

The Visual CRS window (Figure 2-1) contains the following items:

- **Menu button**
- **CRS ribbon**
- **Report Status pane**

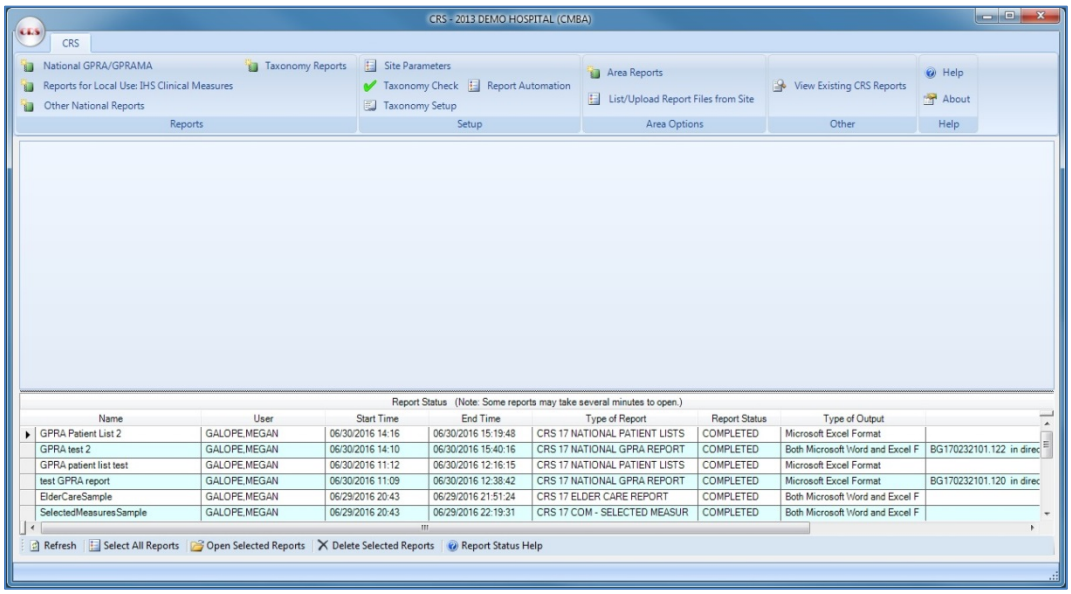


Figure 2-1: Visual CRS **Main** window

2.1 Menu Button

The Menu button is the circle located in the top left corner of the main window. Click the Menu button to display the Visual CRS Menu (Figure 2-2) containing the following options:

- **Change Division:** In a multi-divisional database system, allows reports to be run for other sites within the database.
- **Change Version:** Allows reports to be run using older versions of Visual CRS.
- **Change Report Directory:** Allows the directory where reports will be queued to be changed.
- **Exit:** Closes the Visual CRS window.

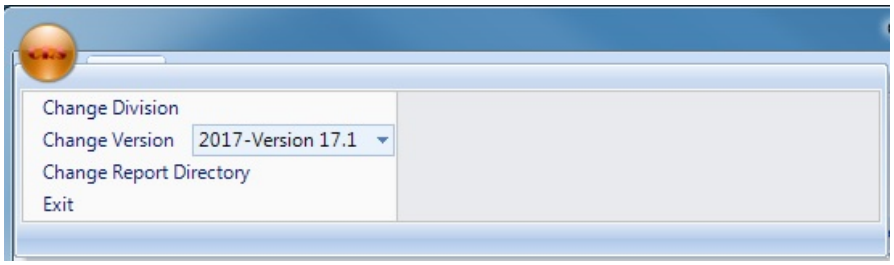


Figure 2-2: Visual CRS Menu

2.1.1 Change Division Option

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

To change the site to which you are logged on:

1. Click the Menu button at the top left corner of the Visual CRS window to display the Menu options.
2. Select **Change Division** from the 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 selected from the list. Use the **Change Division** option (Figure 2-3) again to log on to a different site.

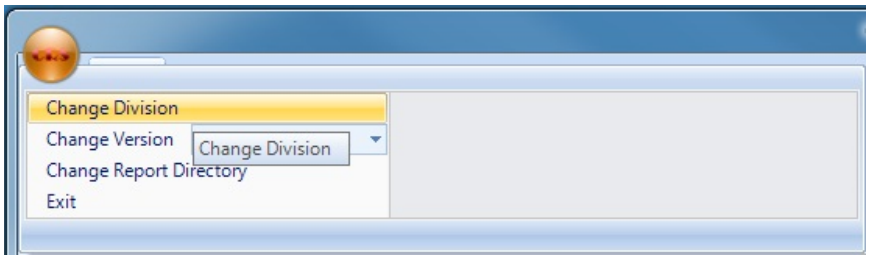


Figure 2-3: Visual CRS **Change Division** option

2.1.2 Change Version Option

Reports can be run using older versions of Visual CRS. Each numbered version of Visual CRS includes performance measure logic that corresponds to a specific Government Performance Results Act (GPRA) report year. For example, the current version of Visual CRS runs reports using the 2017 performance measure logic.

To run reports using a different version of Visual CRS:

1. Click the Menu button at the top left corner of the Visual CRS window to display the Menu options (Figure 2-4).

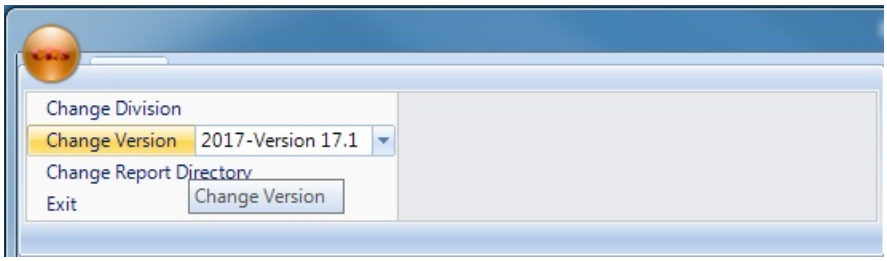


Figure 2-4: Visual CRS **Change Version** option

2. Click the down arrow to the right of the **Change Version** field and select a version from the list.

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

> Only reports for GPRA year 2012 through 2017 can be run with this release. Use the previous released Visual CRS Version 11.1 to run reports for earlier GPRA years.

2.1.3 Change Report Directory Option

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

To change the report directory:

1. Click the Menu button at the top left corner of the Visual CRS window to display the Menu options (Figure 2-5).

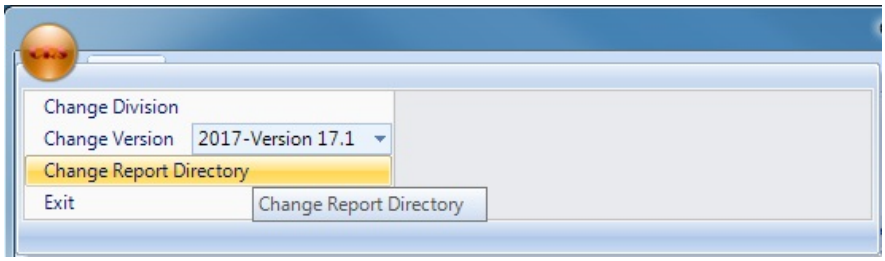


Figure 2-5: Visual CRS **Change Report Directory** option

2. Select **Change Report Directory** from the Menu to display the **Browse For Folder** dialog (Figure 2-6).

Figure 2-6: **Browse For Folder** dialog

3. Click the plus (⊞) to the left of the folder name to navigate to the folder where the reports should be queued.

4. Click the name of the target directory to select it.

5. To create a new folder within the highlighted directory, click **Make New Folder**.

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

2.1.4 Exit

To close Visual CRS:

1. Click the CRS Menu button at the top left corner of the Visual CRS window (Figure 2-7) to display the Menu options.

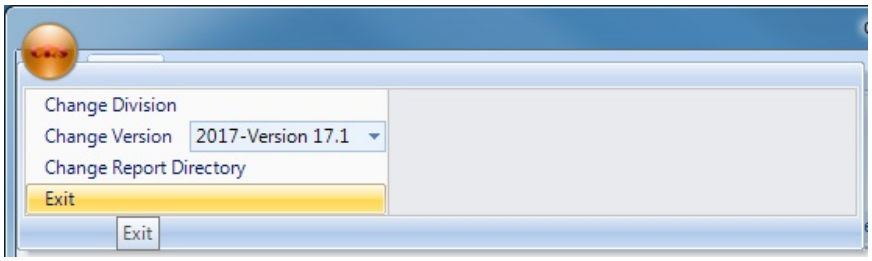


Figure 2-7: Visual CRS **Exit** option

2. Select **Exit** from the menu to display the **Exit** dialog (Figure 2-8).

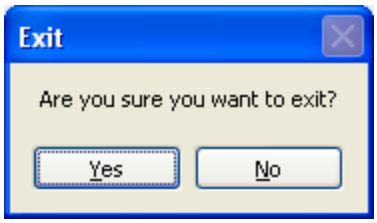


Figure 2-8: Visual CRS **Exit** dialog

3. Click **Yes**.

The close sequence can also be initiated by clicking **Close Window** or by double-clicking the CRS Menu button.

2.2 CRS Ribbon

The CRS ribbon (Figure 2-9) is a panel that consolidates the functionality of the Visual CRS application into one area and organizes independent commands into groups.

Figure 2-9: Visual CRS **Ribbon**

To minimize the CRS ribbon, do one of the following:

- Double click the **CRS** tab at the top of the ribbon.
- Right click the **CRS** tab and select the **Minimize the Ribbon** option.
- Click the down arrow next to the Menu button and select the **Minimize the Ribbon** option

To restore the **CRS** ribbon, repeat any of the previous actions.

The **CRS** ribbon includes the following groups:

- **Reports:** This group lists all the non-Area reports available in Visual CRS.
- **Setup:** This group lists all the setup options for Visual CRS.
- **Area Options:** This group lists all the Area reports and Area options.
- **Other:** This group lists additional commands available for Visual CRS.
- **Help:** This group lists the help functions for Visual CRS.

2.2.1 Reports

This group (Figure 2-10) lists all of the non-Area reports available in Visual CRS organized by report type.

Figure 2-10: Visual **CRS** ribbon **Reports** group

To display all the reports for a specific report type, select the report type to run from the **Reports** group. For example, to run the National GPRA/GPRAMA Patient List report, select **National GPRA/GPRAMA** from the **Reports** group and select the **National GPRA/GPRAMA Patient List** tab.

> **Note:** For details on how to run a report, see Section 3.0, Run Reports.

2.2.2 Setup

This group lists all the setup options for Visual CRS (Figure 2-11).

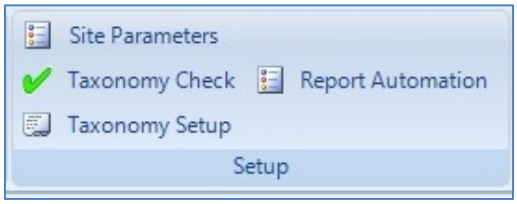


Figure 2-11: Visual **CRS** ribbon **Setup** group

To display the setup options for Visual CRS, select the setup option to view or modify from the **Setup** group. For example, to modify the Site Parameters, select **Site Parameters** from the **Setup** group.

> **Note:** For details on how to set up Visual CRS, see Section 4.0.

2.2.3 Area Options

This group lists all the Area reports and Area options for Visual CRS (Figure 2-12).

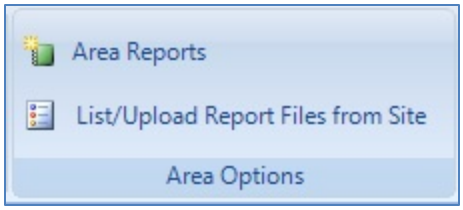


Figure 2-12: Visual **CRS** ribbon **Area Options** group

To display the Area options for Visual CRS, select the **Area** option to run, view, or modify from the **Area Options** group. For example, to run the Area GPRA/GPRAMA Performance report, select **Area Reports** from the **Reports** group and select the **Area GPRA/GPRAMA Performance** tab.

> **Note:** For details on how to run an Area report or manage other Area options, see Section 5.0, Area Options.

2.2.4 Other

This group lists additional commands available for Visual CRS (Figure 2-13).

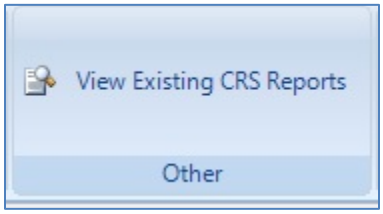


Figure 2-13: **Visual CRS** ribbon **Other** group

To display the other commands for Visual CRS, select the command to execute. For example, to View Existing CRS Reports, select **View Existing CRS Reports** from the **Other** group.

2.2.5 Help

This group (Figure 2-14) lists the help commands available for Visual CRS.

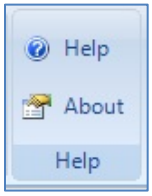
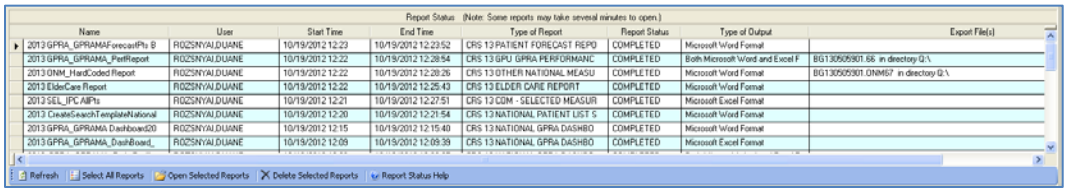


Figure 2-14: Visual **CRS** ribbon **Help** group

To display the help commands for Visual CRS, select the command to execute. For example, to open the Visual CRS Help documentation, select **Help** from the **Help** group.

2.3 Report Status Pane

The **Report Status** pane (Figure 2-15), located in the bottom half of the Visual CRS window, lists the reports run by Visual CRS and are stored in the Default Directory.



Name	User	Start Time	End Time	Type of Report	Report Status	Type of Output	Export File(s)
2013 GPRA_GPRAMAForecastPts 8	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED	Microsoft Word Format	
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED	Both Microsoft Word and Excel F	BG130505901.66 in directory Q:\
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED	Microsoft Word Format	BG130505901.ONM67 in directory Q:\
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED	Microsoft Word Format	
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 12 COM - SELECTED MEASUR	COMPLETED	Microsoft Excel Format	
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED	Microsoft Word Format	
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED	Microsoft Word Format	
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED	Microsoft Excel Format	

Figure 2-15: Visual CRS **Report Status** pane

- Reports that are queued to be run at a later time will display the word **QUEUED** in the **Report Status** column.
- Reports that are currently being run will display the word **RUNNING** in this column.
- Reports that have already been run will display the word **COMPLETED** in this column.

Reports listed in this pane can be refreshed, selected, opened, or deleted.

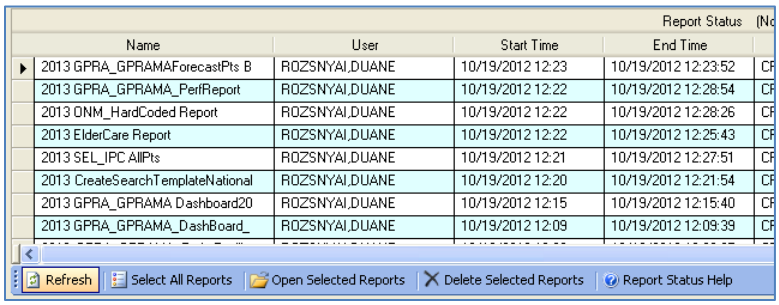
> **Note:** Only reports with the word COMPLETED in the **Report Status** column can be opened or deleted.

The **Report Status** pane provides the following options:

- **Refresh** command (Section 2.3.1, Refresh)
- **Select All Reports** command (Section 2.3.2, Select All Reports)
- **Open Selected Reports** command (Section 2.3.3, Open Selected Reports)
- **Deleted Selected Reports** command (Section 2.3.4, Delete Selected Reports)
- **Report Status Help** command (Section 2.3.5, Report Status Help)
- **Customize Columns** (Section 2.3.6, Customize Columns)

2.3.1 Refresh Report Status

To refresh the report status of the listed reports, click **Refresh** (Figure 2-16) at the bottom of the **Report Status** pane:



Report Status (Nc

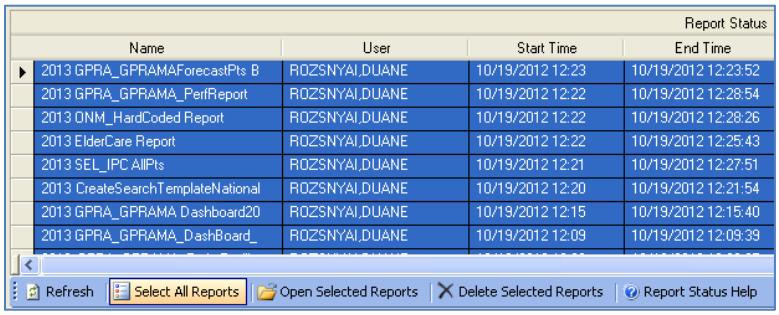
Name	User	Start Time	End Time	
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CF
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CF
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CF
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CF
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CF
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CF
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CF
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CF

Refresh | Select All Reports | Open Selected Reports | Delete Selected Reports | Report Status Help

Figure 2-16: Visual CRS **Report Status Refresh** button

2.3.2 Select All Reports

To select all of the reports listed in the pane, click **Select All Reports** (Figure 2-17) at the bottom of the **Report Status** pane.



Report Status

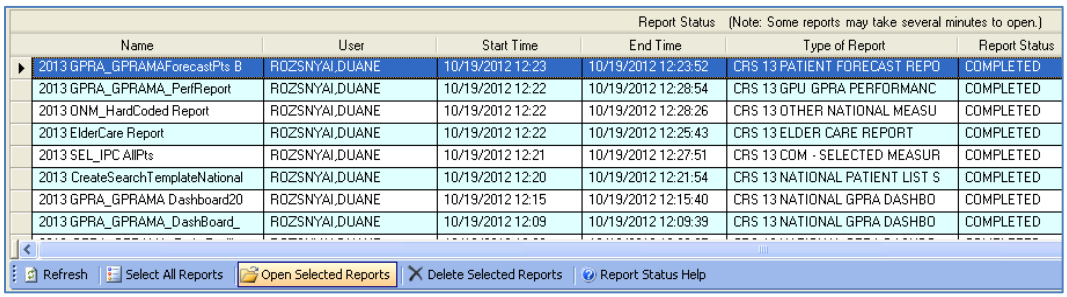
Name	User	Start Time	End Time
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39

Refresh | Select All Reports | Open Selected Reports | Delete Selected Reports | Report Status Help

Figure 2-17: Visual CRS **Report Status Select All Reports** button

2.3.3 Open Selected Reports

The **Open Selected Reports** command (Figure 2-18) opens all highlighted reports having a **Report Status** of COMPLETED.



Report Status (Note: Some reports may take several minutes to open.)

Name	User	Start Time	End Time	Type of Report	Report Status
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED

Refresh | Select All Reports | Open Selected Reports | Delete Selected Reports | Report Status Help

Figure 2-18: Visual CRS **Report Status** select and open single report

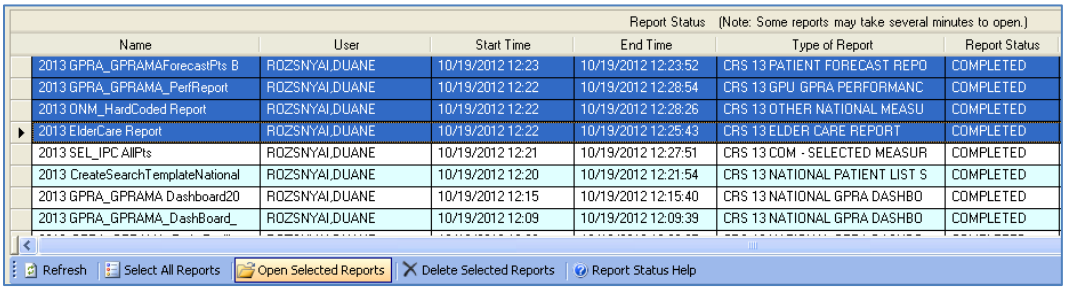
Reports will open in the format stated in the Type of Output column. If the Type of Output column states **Both Microsoft Word and Excel Formats**, a message will appear asking if the report should be opened in Word, Excel, or Both.

To open a single report, do one of the following:

- Double click the COMPLETED report to be opened.
- Highlight the COMPLETED report to be opened and press Enter.
- Highlight the COMPLETED report to be opened and then click the **Open Selected Reports** command at the bottom of the **Report Status** pane.

To open multiple reports (Figure 2-19), do one of the following:

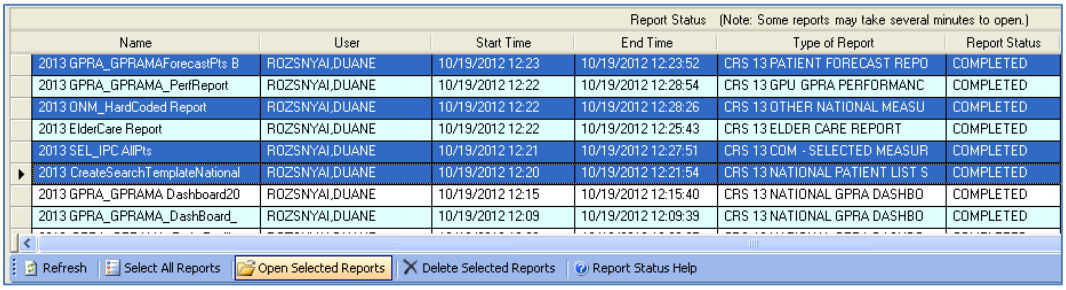
- Use the mouse to highlight the COMPLETED reports to be opened and click **Open Selected Reports** at the bottom of the **Report Status** pane or press the Enter key.
- Use the Shift-Up/Down Arrow keys to highlight the COMPLETED reports to be opened and click **Open Selected Reports** at the bottom of the **Report Status** pane or press the Enter key.



Name	User	Start Time	End Time	Type of Report	Report Status
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED

Figure 2-19: Visual CRS **Report Status** select and open multiple reports

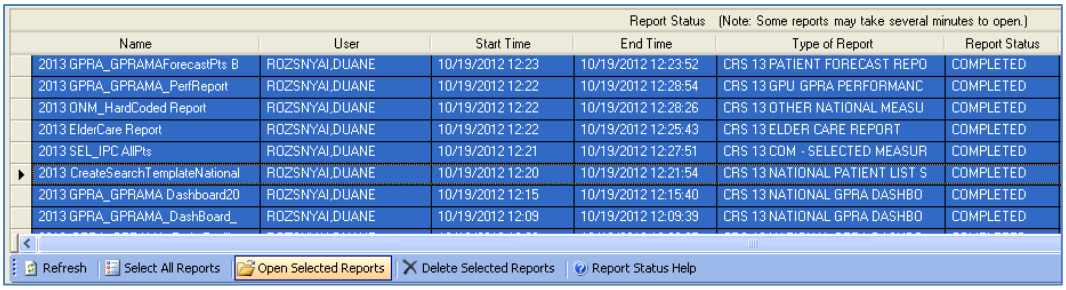
- Press and hold the Ctrl key and use the mouse to highlight all the COMPLETED reports to be opened (Figure 2-20) and click **Open Selected Reports** at the bottom of the **Report Status** pane or press the Enter key.



Name	User	Start Time	End Time	Type of Report	Report Status
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED

Figure 2-20: Visual CRS **Report Status** select and open reports using Ctrl key

- If all reports have a **Report Status** of COMPLETED (Figure 2-21), click **Select All Reports** to highlight all reports and click **Open Selected Reports** at the bottom of the **Report Status** pane or press the Enter key.



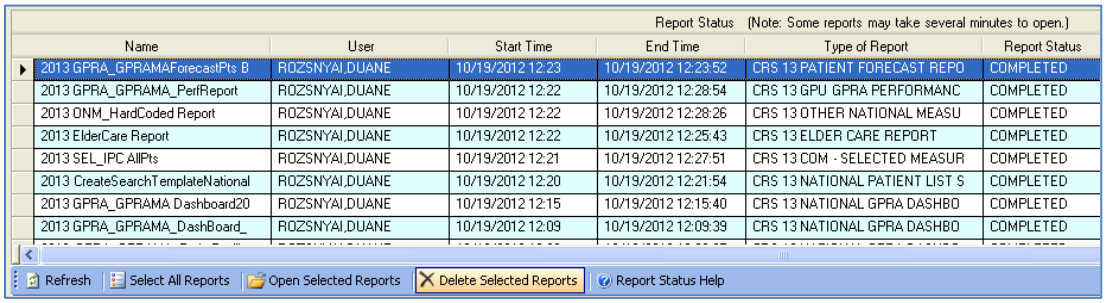
Name	User	Start Time	End Time	Type of Report	Report Status
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED

Figure 2-21: Visual CRS **Report Status** select and open all completed reports

2.3.4 Delete Selected Reports

The **Delete Selected Reports** command will delete all highlighted reports with a report status of COMPLETED or ERRORED.

To delete a single report, highlight the COMPLETED or ERRORED report to be deleted (Figure 2-22) and click **Delete Selected Reports** at the bottom of the **Report Status** pane:

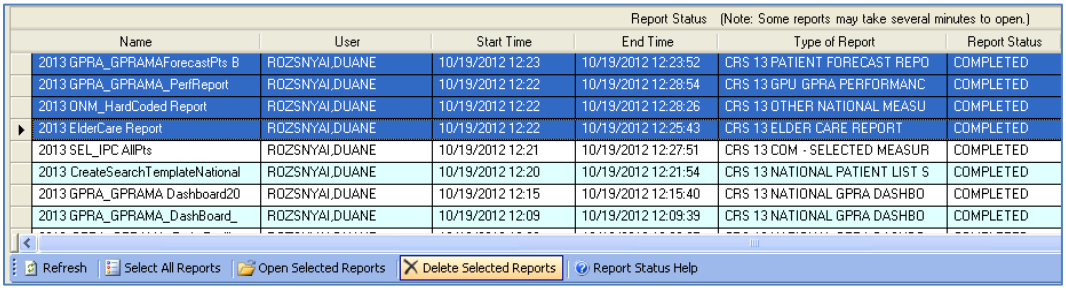


Name	User	Start Time	End Time	Type of Report	Report Status
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED

Figure 2-22**:** Visual CRS **Report Status** select and delete a single report

To delete multiple reports (Figure 2-23) do one of the following:

- Use the mouse to highlight the COMPLETED or ERRORED reports to be deleted and click **Delete Selected Reports** at the bottom of the **Report Status** pane.
- Use the Shift-Up/Down Arrow keys to highlight the COMPLETED or ERRORED reports to be deleted and click **Delete Selected Reports** at the bottom of the **Report Status** pane.



Name	User	Start Time	End Time	Type of Report	Report Status
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED

Figure 2-23: Visual CRS **Report Status** select and delete multiple reports

- Press and hold the Ctrl key and use the mouse to highlight all the COMPLETED or ERRORED reports to be deleted (Figure 2-24) and click **Delete Selected Reports** at the bottom of the **Report Status** pane.

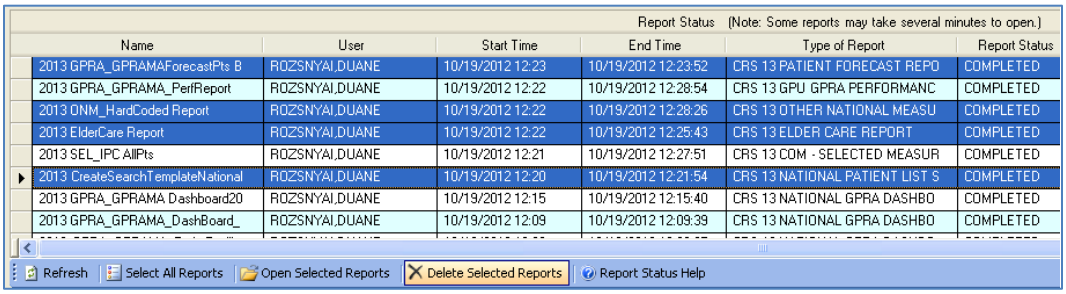


Figure 2-24: Visual CRS **Report Status** select and delete reports using Ctrl key

- If all reports have a report status of COMPLETED or ERRORED (Figure 2-25), click **Select All Reports** to highlight all reports and click **Delete Selected Reports** at the bottom of the **Report Status** pane.

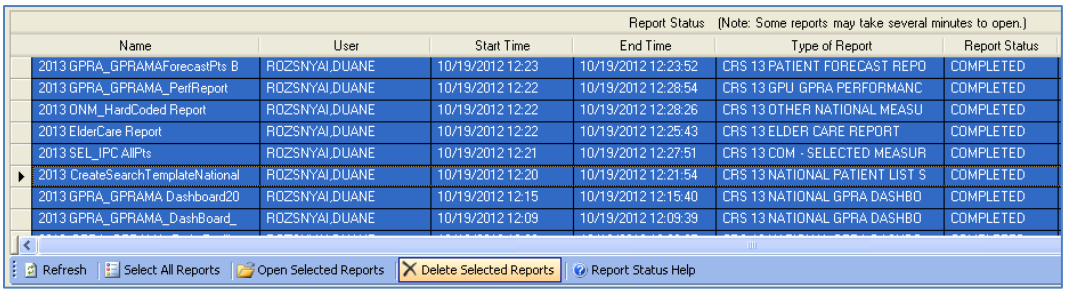


Figure 2-25: Visual CRS **Report Status** select and delete all completed reports

2.3.5 Report Status Help

The **Report Status Help** button (Figure 2-26) will open the Visual CRS online help documentation for the **Report Status** pane.

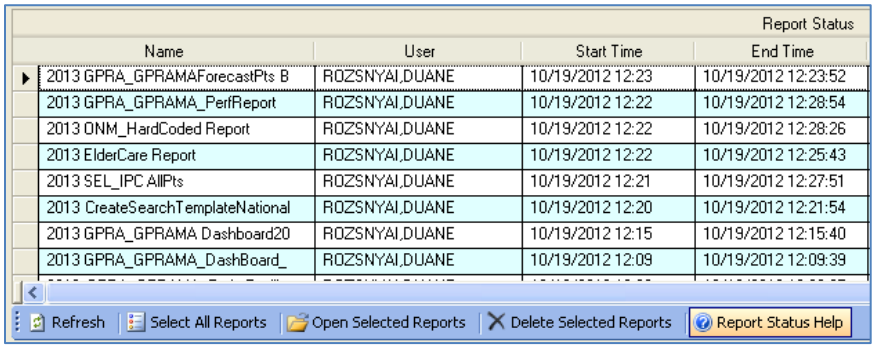


Figure 2-26: Visual CRS **Report Status** pane **Report Status Help** button

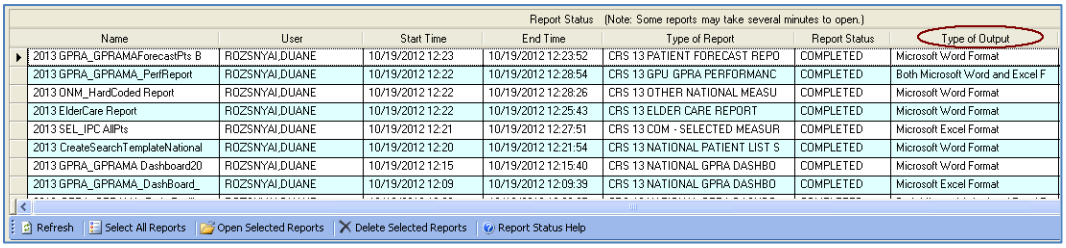
2.3.6 Customize Columns

Visual CRS allows users to customize how the data is displayed in the **Report Status** pane.

> **Note:** Any customization will only remain in effect until the **Report Status** pane is refreshed.

Columns may be arranged in any order. To move a column:

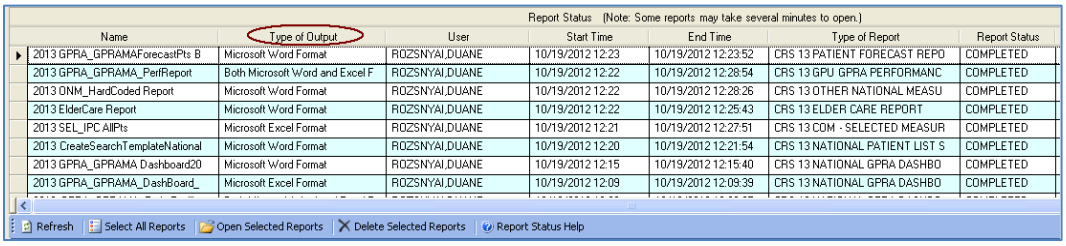
1. Place the pointer over the column heading (Figure 2-27).



Name	User	Start Time	End Time	Type of Report	Report Status	Type of Output
2013 GPRA_GPRAMAForecastPts B	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED	Microsoft Word Format
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED	Both Microsoft Word and Excel F
2013 ONM_HardCoded Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED	Microsoft Word Format
2013 ElderCare Report	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED	Microsoft Word Format
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED	Microsoft Excel Format
2013 CreateSearchTemplateNational	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED	Microsoft Word Format
2013 GPRA_GPRAMA Dashboard20	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED	Microsoft Word Format
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED	Microsoft Excel Format

Figure 2-27: Visual CRS **Report Status** Type Output column default location

2. Click and hold the left mouse button.
3. Drag the column to the desired location (Figure 2-28).



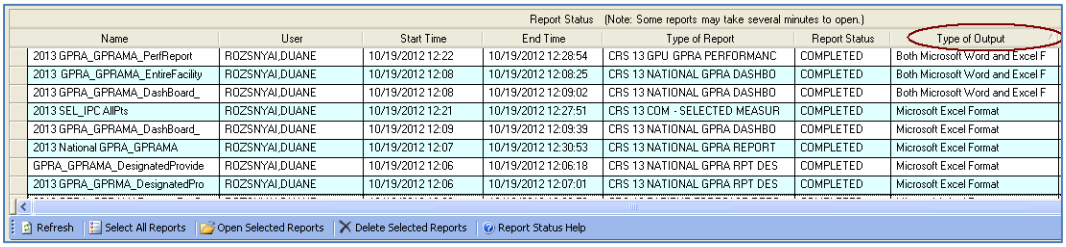
Name	Type of Output	User	Start Time	End Time	Type of Report	Report Status
2013 GPRA_GPRAMAForecastPts B	Microsoft Word Format	ROZSNYAI,DUANE	10/19/2012 12:23	10/19/2012 12:23:52	CRS 13 PATIENT FORECAST REPO	COMPLETED
2013 GPRA_GPRAMA_PerfReport	Both Microsoft Word and Excel F	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED
2013 ONM_HardCoded Report	Microsoft Word Format	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:26	CRS 13 OTHER NATIONAL MEASU	COMPLETED
2013 ElderCare Report	Microsoft Word Format	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:25:43	CRS 13 ELDER CARE REPORT	COMPLETED
2013 SEL_IPC AllPts	Microsoft Excel Format	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED
2013 CreateSearchTemplateNational	Microsoft Word Format	ROZSNYAI,DUANE	10/19/2012 12:20	10/19/2012 12:21:54	CRS 13 NATIONAL PATIENT LIST S	COMPLETED
2013 GPRA_GPRAMA Dashboard20	Microsoft Word Format	ROZSNYAI,DUANE	10/19/2012 12:15	10/19/2012 12:15:40	CRS 13 NATIONAL GPRA DASHBO	COMPLETED
2013 GPRA_GPRAMA_DashBoard_	Microsoft Excel Format	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED

Figure 2-28: Visual CRS **Report Status** move Type Output column from default location

4. Release the mouse button.

To sort the list by columns in ascending or descending order:

1. Click the column name to sort the list in ascending order by that column (Figure 2-29).



Name	User	Start Time	End Time	Type of Report	Report Status	Type of Output
2013 GPRA_GPRAMA_PerfReport	ROZSNYAI,DUANE	10/19/2012 12:22	10/19/2012 12:28:54	CRS 13 GPU GPRA PERFORMANC	COMPLETED	Both Microsoft Word and Excel F
2013 GPRA_GPRAMA_EntireFacility	ROZSNYAI,DUANE	10/19/2012 12:08	10/19/2012 12:08:25	CRS 13 NATIONAL GPRA DASHBO	COMPLETED	Both Microsoft Word and Excel F
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:08	10/19/2012 12:09:02	CRS 13 NATIONAL GPRA DASHBO	COMPLETED	Both Microsoft Word and Excel F
2013 SEL_IPC AllPts	ROZSNYAI,DUANE	10/19/2012 12:21	10/19/2012 12:27:51	CRS 13 COM - SELECTED MEASUR	COMPLETED	Microsoft Excel Format
2013 GPRA_GPRAMA_DashBoard_	ROZSNYAI,DUANE	10/19/2012 12:09	10/19/2012 12:09:39	CRS 13 NATIONAL GPRA DASHBO	COMPLETED	Microsoft Excel Format
2013 National GPRA_GPRAMA	ROZSNYAI,DUANE	10/19/2012 12:07	10/19/2012 12:30:53	CRS 13 NATIONAL GPRA REPORT	COMPLETED	Microsoft Excel Format
GPRA_GPRAMA_DesignatedProvide	ROZSNYAI,DUANE	10/19/2012 12:06	10/19/2012 12:06:18	CRS 13 NATIONAL GPRA RPT DES	COMPLETED	Microsoft Excel Format
2013 GPRA_GPRMA_DesignatedPro	ROZSNYAI,DUANE	10/19/2012 12:06	10/19/2012 12:07:01	CRS 13 NATIONAL GPRA RPT DES	COMPLETED	Microsoft Excel Format

Figure 2-29: Visual CRS **Report Status** sort Type Output column ascending

2. Click the column name again to sort the list in descending order by that column (Figure 2-30).

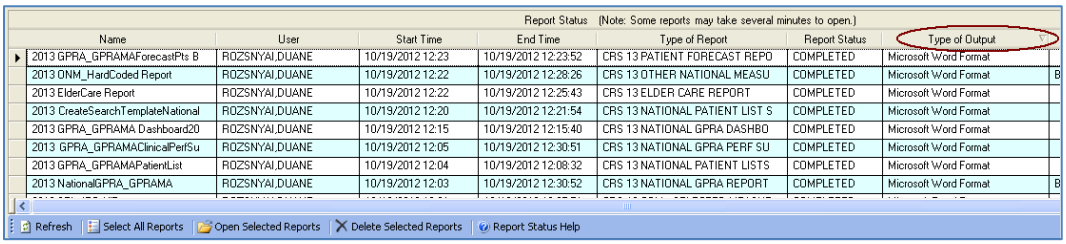


Figure 2-30: Visual CRS **Report Status** sort Type Output column descending

3.0 Run Reports

If the RPMS Demo/Test Patient Search Template does not contain any patients the Demo Patients dialog (Figure 3-1) will display once when accessing the reports for the first time.

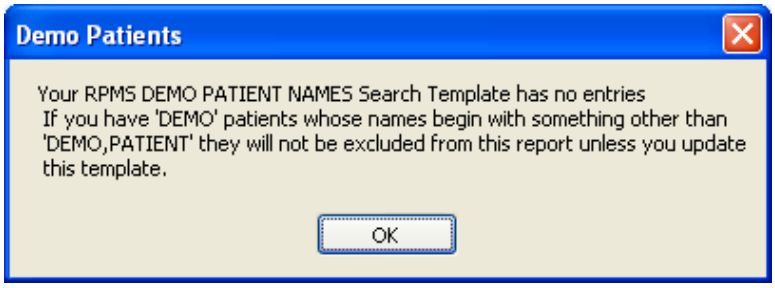


Figure 3-1: **Demo Patients** dialog

> **Note**: See Section 6.1, Create or Select a Demo/Test Patient Search Template, for information about creating or selecting Demo/Test patients.

- Click **OK** to continue.

3.1 National GPRA/GPRAMA Reports

3.1.1 National GPRA/GPRAMA Report

Use this option to produce a National GPRA/GPRAMA Report for the 2017 GPRA year using the performance measure definitions from CRS Version 17.1. The following parameters are predefined for this report:

- A report period of July 1, 2016 through June 30, 2017
- A baseline year of July 1, 2009 through June 30, 2010
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

> **Note**: See Section 5.2 in the *CRS Version 17.1 User Manual* for additional information on the National GPRA/GPRAMA Report.

To run the National GPRA/GPRAMA Report:

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.
2. Select the **GPRA/GPRAMA** tab to display the **GPRA/GPRAMA Report** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-2):

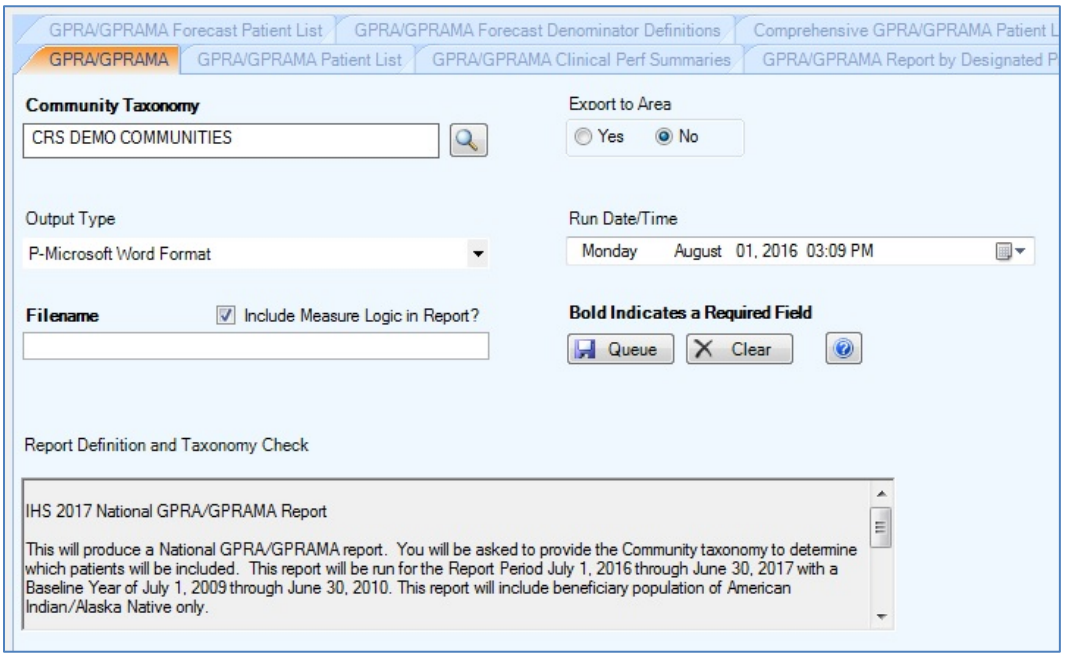


Figure 3-2: Visual CRS **GPRA/GPRAMA Report** pane

- If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
- If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies before running any of the National GPRA/GPRAMA reports. See Section 4.1.2, Set Up Taxonomies.

4. If necessary, change the **Community Taxonomy** value:

   a. Click the adjacent Search button.

   b. Follow the instructions in Section 6.2.1, Select a Community Taxonomy.

> **Note**: The site's default community taxonomy is defined using the **Site Parameters** option (Section 4.2, Site Parameters).

5. At the **Export to Area** options, do one of the following:

   - To send final data to your Area Office, click **Yes**.
   - If you are not ready to send final data to your Area Office, click **No**.

6. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

7. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

9. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.2 National GPRA/GPRAMA Report Patient List

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

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The **GPRA/GPRAMA Report Patient List** menu option will not be displayed for users without this security key.
> See Section 5.3 in the *CRS Version 17.1 User Manual* for additional information on the National GPRA/GPRAMA Patient List.

To run the National GPRA/GPRAMA Report Patient List:

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.

2. Select the **GPRA/GPRAMA Patient List** tab to display the **GPRA/GPRAMA Report Patient List** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-3):

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

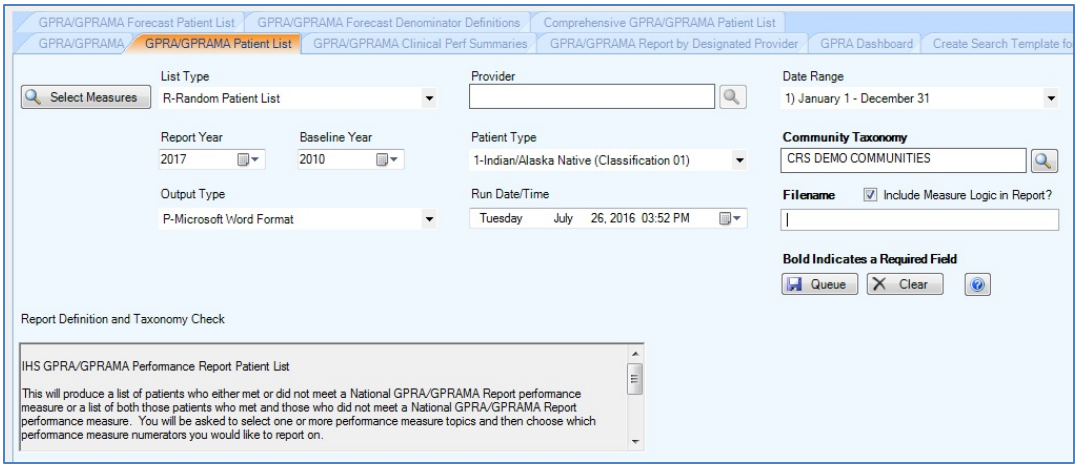


Figure 3-3: Visual CRS **GPRA/GPRAMA Patient List Report** pane

4. To select performance measures and patient lists, click the **Select Measures** button in the top left corner of the report pane and follow the instructions in Section 6.10, Measures and Patient Lists.

5. From the **List Type** field, select one of the following:

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

6. To set the **Date Range, Report Year** or **Report End**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

7. From the **Patient Type** field, select one of the following beneficiary populations on which to report:

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

8. If necessary, change the **Community Taxonomy** value:

   a. Click the adjacent Search button.

   b. Follow the instructions in Section 6.2.1, Select a Community Taxonomy.

9. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

10. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

11. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.

12. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.3 National GPRA/GPRAMA Clinical Performance Summaries

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

- A report period of July 1, 2016 through June 30, 2017
- A baseline year of July 1, 2009 through June 30, 2010
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

Note: See Section 5.4 in the *CRS Version 17.1 User Manual* for additional information on the National GPRA/GPRAMA Clinical Performance Summaries Report.

To run the National GPRA/GPRAMA Clinical Performance Summaries:

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.

2. Select the **GPRA/GPRAMA Clinical Perf Summaries** tab to display the **GPRA/GPRAMA Clinical Perf Summaries** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-4):

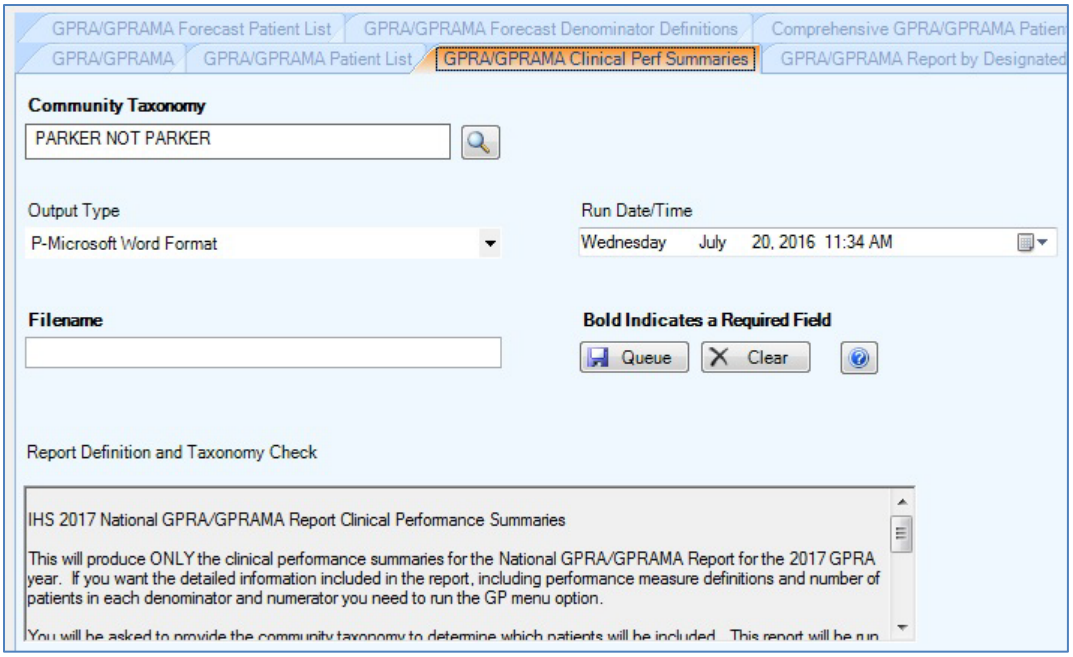


Figure 3-4: Visual CRS **GPRA/GPRAMA Clinical Perf Summaries Report** pane

- If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
- If a message is displayed stating that one or more taxonomies are missing or have no entries then you must set up the taxonomies before running any of the National GPRA/GPRAMA reports. Select the **Taxonomy Setup** option (Section 4.1.2, Set Up Taxonomies) from the **Setup** group to set up and populate the required taxonomies.

4. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

5. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

6. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

7. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.4 National GPRA/GPRAMA Report by Designated Provider

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

- A report period of July 1, 2016 through June 30, 2017
- A baseline year of July 1, 2009 through June 30, 2010
- 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 17.1 User Manual* for additional information on the National /GPRAMA Report by Designated Provider.

3.1.4.1 Run the National GPRA/GPRAMA Report by Designated Provider

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.
2. Select the **GPRA/GPRAMA Report by Designated Provider** tab to display the **GPRA/GPRAMA Report by Designated Provider** pane containing information about the report and the results of the taxonomy check.
3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-5).

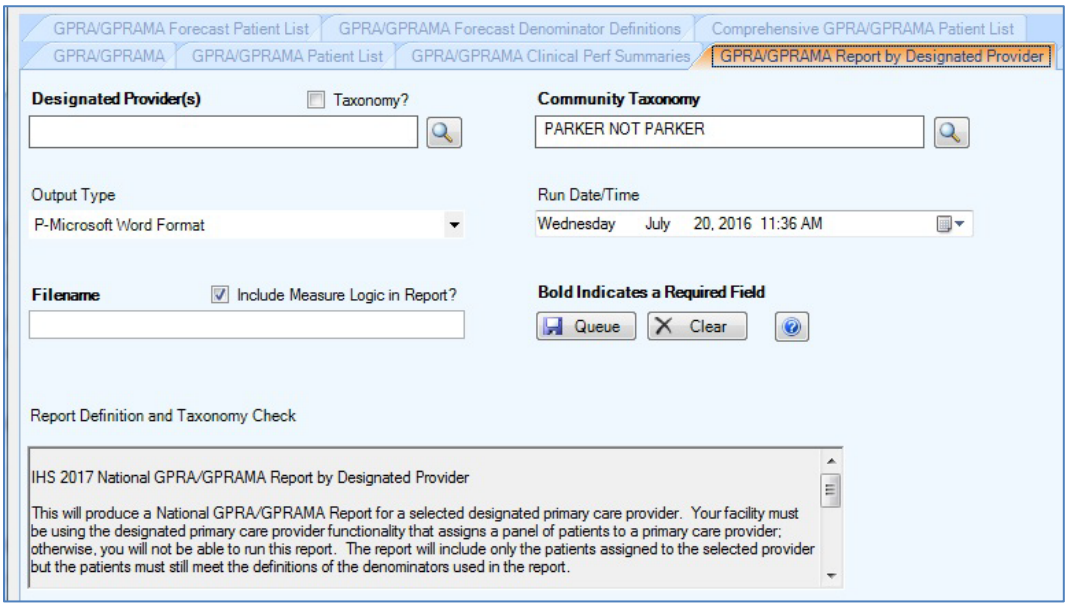


Figure 3-5: Visual CRS **GPRA/GPRAMA Report by Designated Provider Report** pane

- If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.

- If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

4. To select the designated provider(s) on which to report, follow the instructions in Section 6.6.2, Select Multiple Providers.
5. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).
6. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
7. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.
8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.
9. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.5 National GPRA Dashboard

Use this option to produce a GPRA Dashboard report for the 2017 GPRA year. The following parameters are predefined for this report:

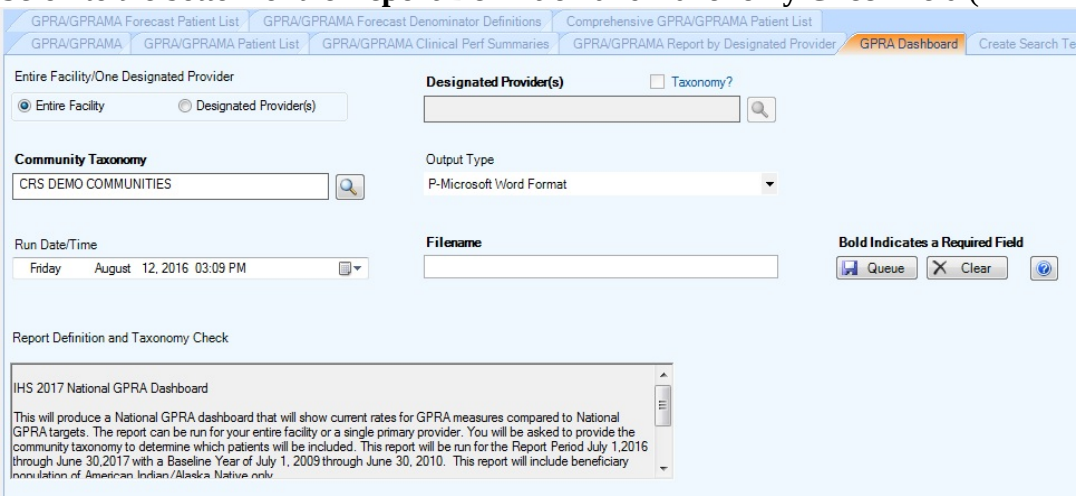
- GPRA Year 2017: July 1, 2016 through June 30, 2017
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

Note:	See Section 5.6 in the *CRS Version 17.1 User Manual* for additional information on the National GPRA Dashboard.

To run the National GPRA Dashboard:

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.
2. Select the **GPRA Dashboard** tab to display the **GPRA Dashboard** pane containing information about the report and the results of the taxonomy check.

Scroll to the bottom of the **Report Definition and Taxonomy Check** field (



3. Figure 3-6).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

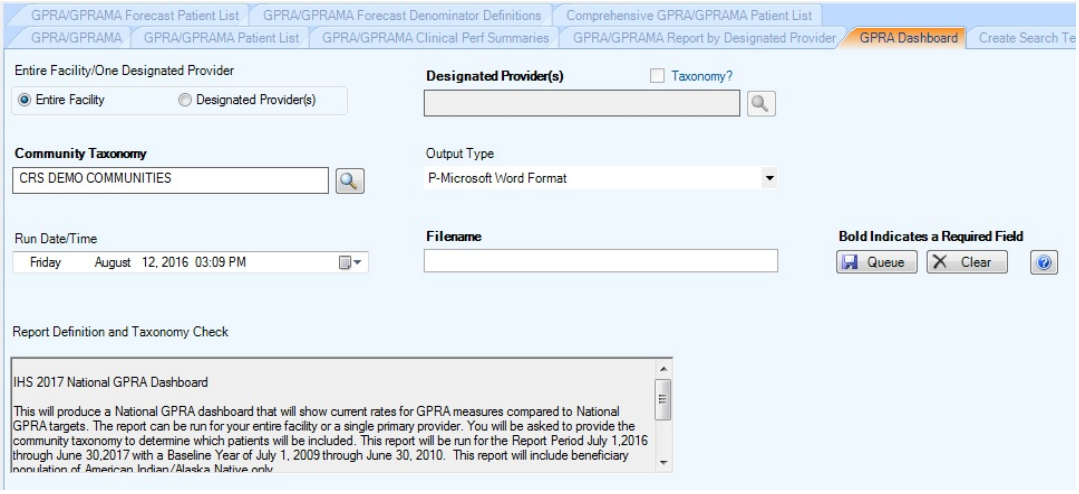


Figure 3-6: Visual CRS **GPRA Dashboard Report** pane

4. At the **Entire Facility/One Designated Provider** options, do one of the following:

   - To run the GPRA Dashboard for the entire facility select **Entire Facility**.

- To select designated providers on which to report, select **Designated Provider(s)** and follow the instructions in Section 6.6.2, Select Multiple Providers.

5. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

6. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

7. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

8. To view the report, follow the instructions in Section 6.14, View a Completed 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/GPRAMA 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 17.1 User Manual* for additional information on creating a search template for a national GPRA/GPRAMA patient list.

To create a Search Template for a National GPRA/GPRAMA Report Patient List:

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.

2. Select the **Create Search Template for National Patient List** tab to display the **Create Search Template for National Patient List** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-7).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.

- If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

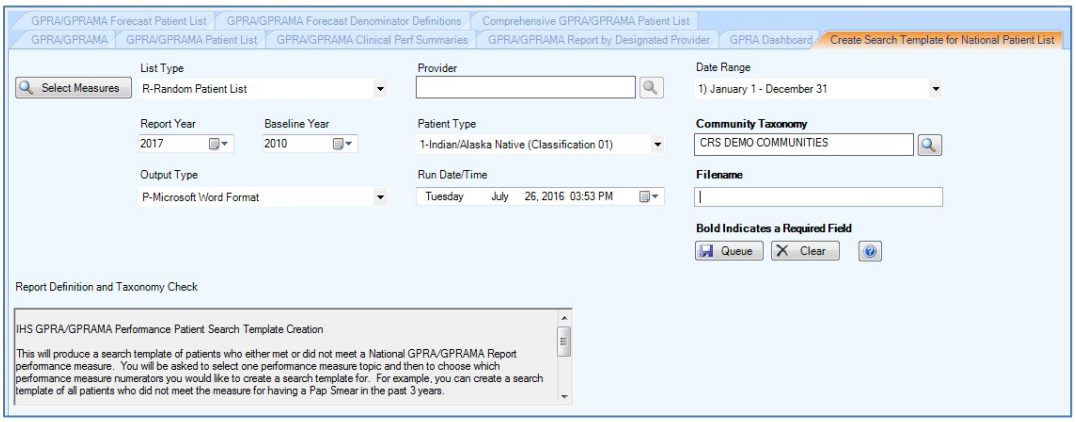


Figure 3-7: Visual CRS **Create Search Template for National Patient List** pane

4. To select performance measures and patient lists, click the **Select Measures** button at the top of the pane and follow the instructions in Section 6.10, Measures and Patient Lists.

   After selecting performance measures and patient lists, the **Search Template** dialog (Figure 3-8) is displayed.

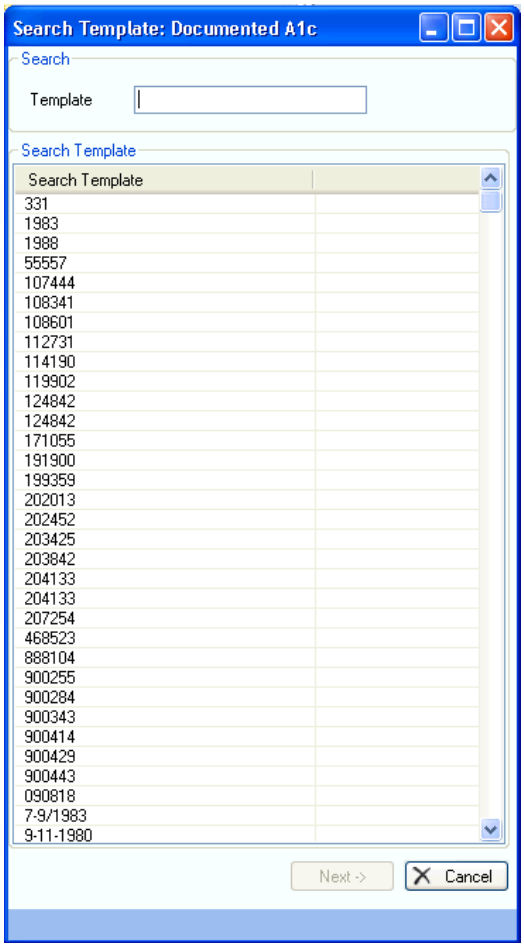


Figure 3-8: Visual CRS **Search Template** dialog

To add or overwrite a search template with the selected performance measures, follow the instructions in Section 6.9, Search Templates

Add/Overwrite Search Template.

5. From the **List Type** list, select one of the following:

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

6. To set the **Date Range, Report Year** or **Report End**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

7. From the **Patient Type** list, select one of the following beneficiary populations on which to report:
   - **1 - Indian/Alaska Native (Classification 01)**
   - **2 - Not Indian Alaskan/Native (Not Classification 01)**
   - **3 - All (Both Indian/Alaska Natives and Non-01)**
8. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).
9. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
10. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.
11. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.7 GPRA/GPRAMA Forecast Patient List

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

> **Notes:** Users must have the BGPZ PATIENT LIST security key to run patient lists.
> The **GPRA/GPRAMA Forecast Patient List** menu option will not be displayed for users without this security key.
> See Section 5.8 in the *CRS Version 17.1 User Manual* for additional information on the GPRA/GPRAMA Forecast Patient List.

To run the GPRA/GPRAMA Forecast Patient List:

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.
2. Select the **GPRA/GPRAMA Forecast Patient List** tab to display the **GPRA/GPRAMA Forecast Patient List** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-9).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

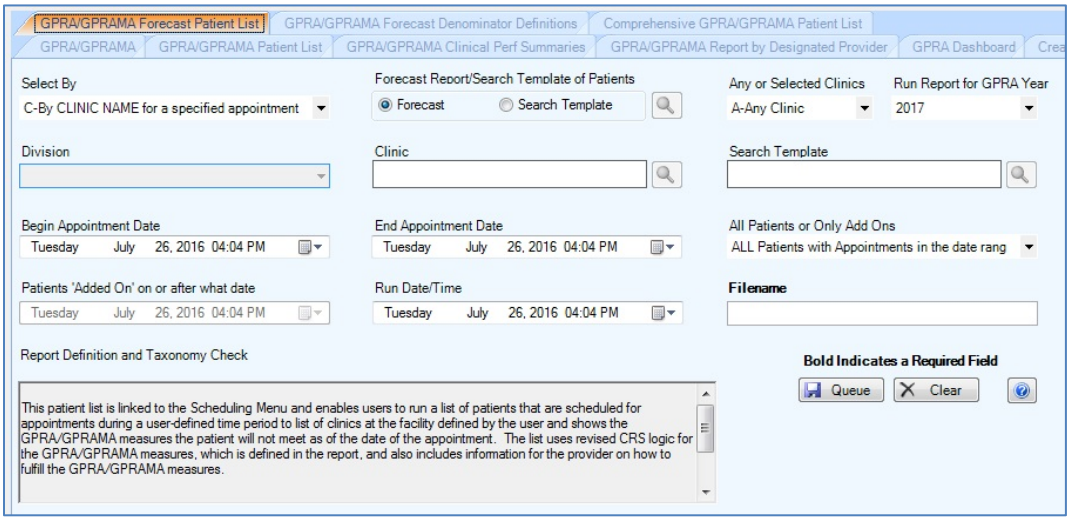


Figure 3-9: Visual CRS **GPRA/GPRAMA Forecast Patient List** pane

4. Notice the **Select By** list, which provides a choice of four versions of this report:

   - **C - By CLINIC NAME for a specified appointment date range** (go to Section 3.1.7.1, GPRA/GPRAMA Forecast Patient List by Clinic Name)
   - **P - Selected Patients w/Appointments** (go to Section 3.1.7.2, GPRA/GPRAMA Forecast Patient List by Selected Patients w/Appointments)
   - **D - One Facility's or Division's Appointments** (go to Section 3.1.7.3, GPRA/GPRAMA Forecast Patient List by One Facility's or Division's Appointments)
   - **A - Any selected set of patients regardless of appointment status** (go to Section 3.1.7.4, GPRA/GPRAMA Forecast Patient List by Any Selected Set of Patients Regardless of Appointment Status)

3.1.7.1 GPRA/GPRAMA Forecast Patient List by Clinic Name

To run the GPRA/GPRAMA Forecast Patient List for selected clinics with appointments during a specified date range (Figure 3-10):

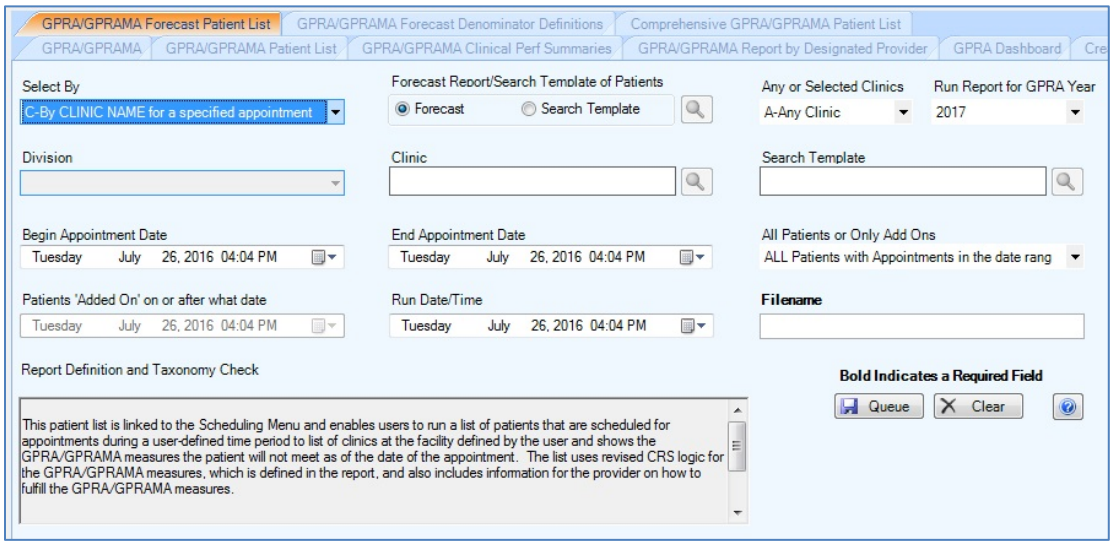


Figure 3-10: Visual CRS **GPRA/GPRAMA Forecast Patient List C-By CLINIC NAME** for a specified appointment date range pane

1. From the **Select By** list, select **C-By CLINIC NAME for a specified appointment date range**.
2. At the **Forecast Report/Search Template of Patients** options, do one of the following:
   - To forecast the report for the GPRA/GPRAMA measures, select **Forecast**.
   - To forecast the report and create a search template with the forecast report, select **Search Template** and click the adjacent Search button.
   - To add or overwrite a search template with the selected forecast report, follow the instruction in Section 6.9, Search Templates
   - Add/Overwrite Search Template.
3. Select a value in the **Any or Selected Clinics** field:
   - **A-Any Clinic**. Includes patients with appointments to all clinics.
   - **O-One or more selected Clinics**. Includes patients with appointments to one or more selected clinics.
4. From the **Run Report for GPRA Year** list, select the criterion to use for the report.
   - To run the report for the current year, use the default selected year (2017).

- To run the report for the following year, select the following year (2018).

5. To select one or more clinics, click the Search button next to the **Clinic** field and follow the instructions in Section 6.5, Select Clinics. If one clinic has been selected, the clinic name will appear in the **Clinic** field. If multiple clinics have been selected for a report, the words **Multiple Clinics** are displayed in the **Clinic** field. If no clinics have been selected, the **Clinic** field will be empty.

6. In the **Begin Appointment Date** and **End Appointment Date** fields, do one of the following:

   - 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.
   - Select the month, date, year, hour, minute, or AM/PM that appears in the field. Use the UP and DOWN ARROW keys for each component to select the correct date the for the report period to begin or end. Repeat for each component that you want to change.

Note:	The **End Appointment Date** must be less than seven days after the **Begin Appointment Date**.

7. From the **All Patients or Only Add Ons** list, select the criterion to use for the forecast patient list.

   - **ALL Patients with Appointments in the date rang**e – This option will forecast all patients with appointment within the selected date range.
   - **ONLY Patients added on since a specified date** – This option will forecast only the patients within the selected Appointment date range whose appointment was added on or after the specified date in the **Patients 'Added On' on or after what date** field.

8. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

9. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**. To cancel or reset the report parameters without queuing the report, click **Clear**.

10. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.7.2 GPRA/GPRAMA Forecast Patient List by Selected Patients w/Appointments

To run the GPRA/GPRAMA Forecast Patient List for a single selected patient with appointments in a specified date range (Figure 3-11):

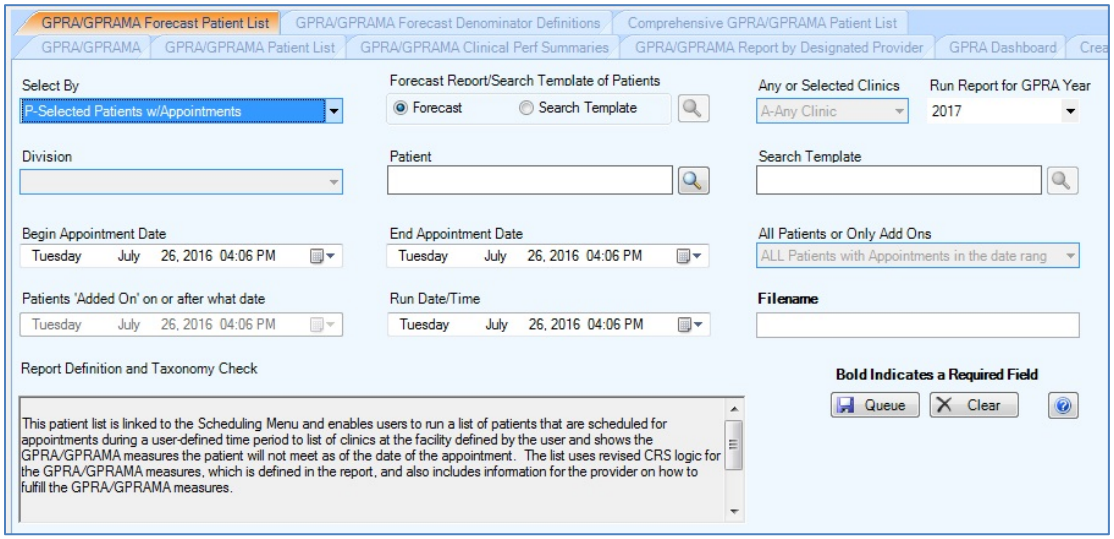


Figure 3-11: Visual CRS **GPRA/GPRAMA Forecast Patient List P-Selected Patients w/Appointments** pane

1. From the **Select By** list, select **P-Selected Patients w/Appointments**.
2. At the **Forecast Report/Search Template of Patients** options, do one of the following:
   - To forecast the report for the GPRA/GPRAMA measures, select **Forecast**.
   - To forecast the report and create a search template with the forecast report, select **Search Template** and click the Search button next to **Search Template**.
   - To add or overwrite a search template with the selected forecast report, follow the instruction in Section 6.9, Search Templates
   - Add/Overwrite Search Template.
3. From the **Run Report for GPRA Year** list, select the criterion to use for the report.
   - To run the report for the current year, use the default selected year (2017).
   - To run the report for the following year, select the following year (2018).
4. To select a patient, click the Search button next to the **Patient** field to display the **Select Patient** dialog (Figure 3-12).

a. Type all or part of the patient's name (last name, then first name), social security number, chart number (HRN), or date of birth in the format MM/DD/YYYY, in the **Patient Lookup Options** field.

> **Note:** To type part of the patient's name, a minimum of three characters are required.

b. Click the Search button next to the **Patient Lookup Options** field. A list of names matching the criteria entered is displayed in the **Patient List** pane.

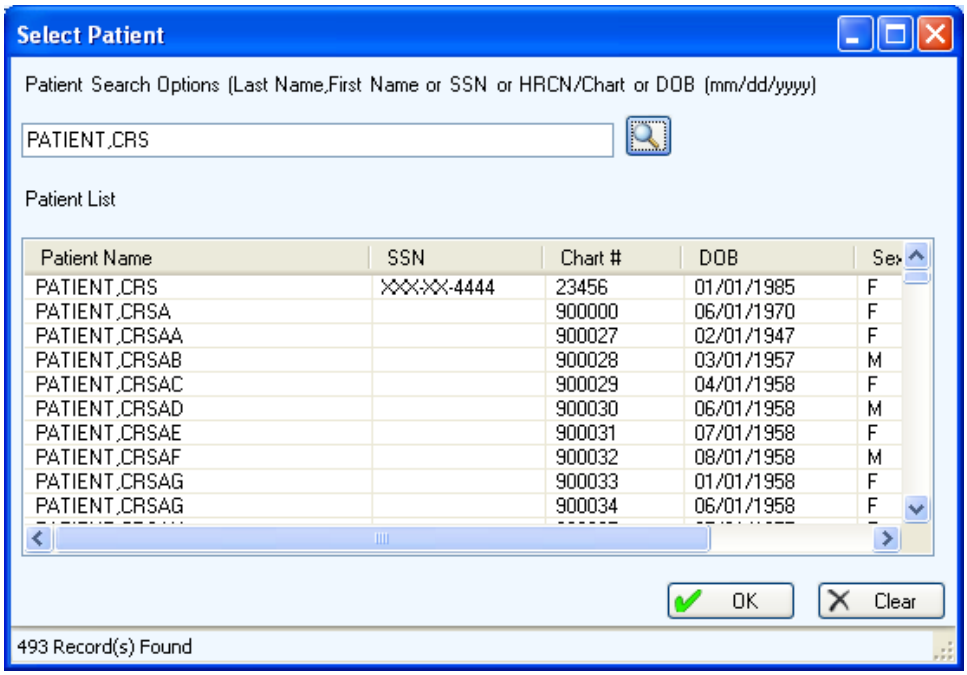


Figure 3-12: Visual CRS **Select Patient** dialog

5. To select a patient on whom to report do one of the following:

   - Double click the patient's name to close the **Select Patient** dialog.
   - Highlight the patient's name then click **OK** to close the **Select Patient** dialog.

     The patient's name is displayed in the **Patient** field in the report pane.

   - To clear the list of names and locate a different patient, click **Clear** and repeat Steps 4 and 4.

6. In the **Begin Appointment Date** and **End Appointment Date** fields, do one of the following:

   - 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.

- Select the month, date, year, hour, minute, or AM/PM that appears in the field. Use the UP and DOWN ARROW keys for each component to select the correct date the for the report period to begin or end. Repeat for each component that you want to change.

> **Note:** The **End Appointment Date** must be less than seven days after the **Begin Appointment Date**.

7. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**. To cancel or reset the report parameters without queuing the report, click **Clear**.

9. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.7.3 GPRA/GPRAMA Forecast Patient List by One Facility's or Division's Appointments

To run the GPRA/GPRAMA Forecast Patient List for appointments at a facility or division during a specified date range (Figure 3-13):

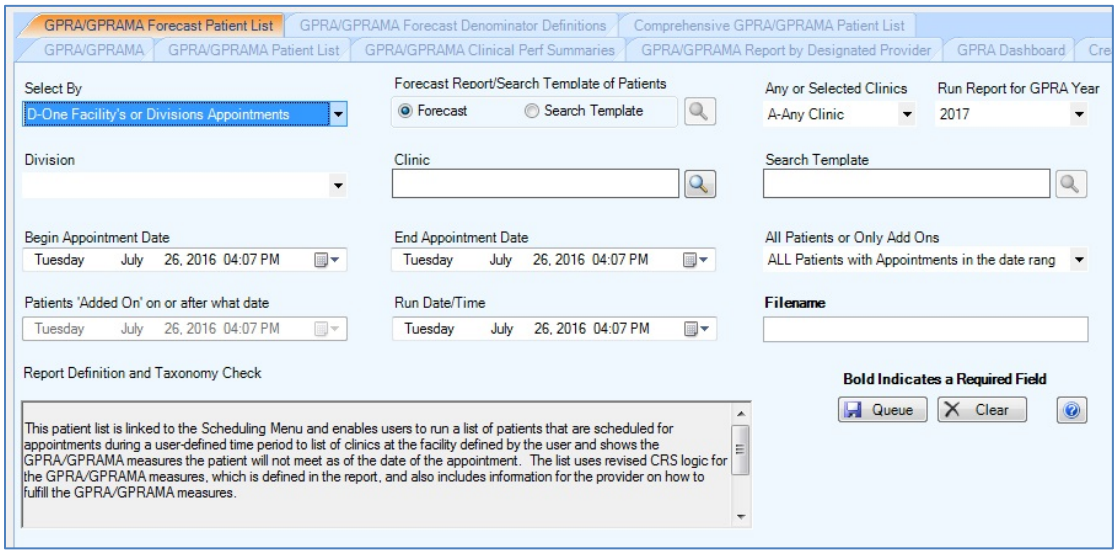


Figure 3-13: Visual CRS **GPRA/GPRAMA Forecast Patient List D-One Facility's or Divisions Appointments** pane

1. From the **Select By** list, select **D-One Facility's or Divisions Appointments**.

2. At the **Forecast Report/Search Template of Patients** options, do one of the following:

   - To forecast the report for the GPRA/GPRAMA measures, select **Forecast**.

- To forecast the report and create a search template with the forecast report, select **Search Template** and click the Search button next to **Search Template**.
- To add or overwrite a search template with the selected forecast report, follow the instruction in Section 6.9, Search Templates
- Add/Overwrite Search Template.

3. Select a value in the **Any or Selected Clinics** field:
   - **A-Any Clinic**. Includes patients with appointments to all clinics.
   - **O-One or more selected Clinics**. Includes patients with appointments to one or more selected clinics.
4. From the **Run Report for GPRA Year** list, select the criterion to use for the report.
   - To run the report for the current year, use the default selected year (2017).
   - To run the report for the following year, select the following year (2018).
5. From the **Division** list, select the division on which to report.

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

6. To select one or more clinics, click the Search button next to the **Clinic** field and follow the instructions in Section 6.5, Select Clinics. If one clinic has been selected, the clinic name will appear in the **Clinic** field. If multiple clinics have been selected for a report, the words **Multiple Clinics** are displayed in the **Clinic** field. If no clinics have been selected, the **Clinic** field will be empty.
7. In the **Begin Appointment Date** and **End Appointment Date** fields, do one of the following:
   - 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.
   - Select the month, date, year, hour, minute, or AM/PM that appears in the field. Use the UP and DOWN ARROW keys for each component to select the correct date the for the report period to begin or end. Repeat for each component that you want to change.

   Note: The **End Appointment Date** must be less than seven days after the **Begin Appointment Date**.

8. From the **All Patients or Only Add Ons** list, select the criterion to use for the forecast patient list.

- **ALL Patients with Appointments in the date range** – This option will forecast all patients with appointment within the selected date range.
- **ONLY Patients added on since a specified date** – This option will forecast only the patients within the selected Appointment date range whose appointment was added on or after the specified date in the **Patients 'Added On' on or after what date** field.

9. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

10. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**. To cancel or reset the report parameters without queuing the report, click **Clear**.

11. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.7.4 GPRA/GPRAMA Forecast Patient List by Any Selected Set of Patients Regardless of Appointment Status

To run the GPRA/GPRAMA Forecast Patient List for a selected set of patients whether they have appointments or not (Figure 3-14):

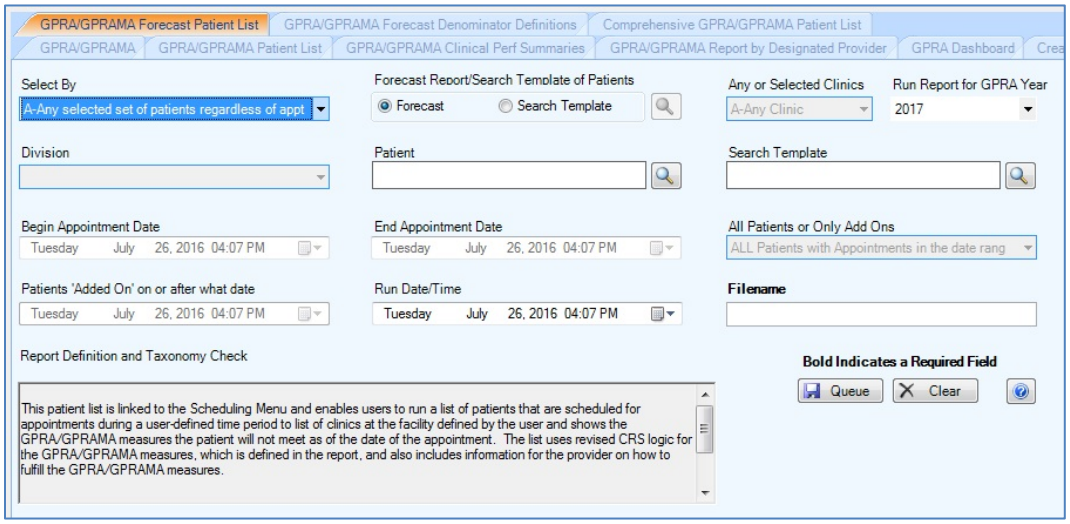


Figure 3-14: Visual CRS **GPRA/GPRAMA Forecast Patient A-Any selected set of patients regardless of appt status** pane

1. From the **Select By** list, select **A-Any selected set of patients regardless of appt status**.

2. At the **Forecast Report/Search Template of Patients** options, do one of the following:

   - To forecast the report for the GPRA/GPRAMA measures, select **Forecast**.

- To forecast the report and create a search template with the forecast report, select **Search Template** and click the Search button next to **Search Template**.
- To add or overwrite a search template with the selected forecast report, follow the instruction in Section 6.9, Search Templates
- Add/Overwrite Search Template.

3. From the **Run Report for GPRA Year** list, select the criterion to use for the report.
   - To run the report for the current year, use the default selected year (2017).
   - To run the report for the following year, select the following year (2018).
4. To select a patient, click the Search button next to the **Patient** field to display the **Select Patient** dialog (Figure 3-15).

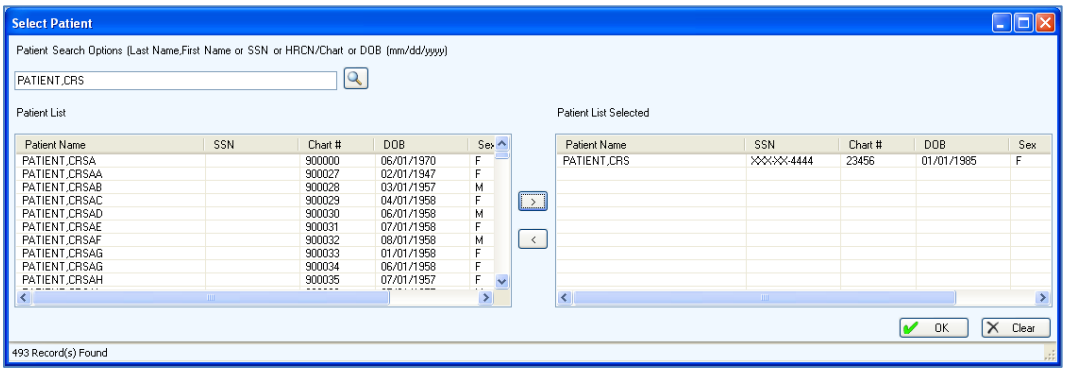


Figure 3-15: Visual CRS **Select Patient** dialog

   a. Type all or part of the patient's name (last name, then first name), social security number, chart number (HRN), or date of birth in the format MM/DD/YYYY, in the **Patient Lookup Options** field.

> **Note:** To type part of the patient's name, a minimum of three characters are required.

   b. Click the Search button next to the **Patient Lookup Options** field. A list of names matching the criterion entered is displayed in the **Patient List** pane.
5. To select a patient on which to report follow the instructions in Section 6.11, Select Multiple Patients.
6. To report on patients included in a search template, click the Search button next to the **Search Template** field and then follow the instructions in Section 6.9.2, Select a Search Template.
7. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

9. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.8 GPRA/GPRAMA Forecast Denominator Definitions

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

> **Note:** See Section 5.9 in the *CRS Version 17.1 User Manual* for additional information on the National GPRA/GPRAMA Forecast Denominators Definitions.

3.1.8.1 Run the GPRA/GPRAMA Forecast Denominators Definitions

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.

2. Select the **GPRA/GPRAMA Forecast Denominator Definitions** tab to display the **GPRA/GPRAMA Forecast Denominator Definitions** pane (Figure 3-16).

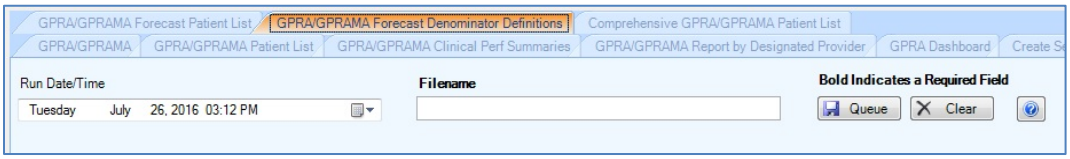


Figure 3-16: Visual CRS **GPRA/GPRAMA Forecast Denominator Definitions** pane

3. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

4. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.1.9 Comprehensive National GPRA/GPRAMA Patient List

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

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The **Comprehensive National**

> **GPRA/GPRAMA Patient List** menu option will not be displayed for users without this security key.
>
> See Section 5.10 in the *CRS Version 17.1 User Manual* for additional information on the Comprehensive National GPRA/GPRAMA Patient List.

To run the Comprehensive National GPRA/GPRAMA Patient List:

1. On the **CRS** ribbon, select **National GPRA/GPRAMA** from the **Reports** group.
2. Select the **Comprehensive GPRA/GPRAMA Patient List** tab to display the **Comprehensive National GPRA/GPRAMA Report Patient List** pane containing information about the report and the results of the taxonomy check.
3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-17).
   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

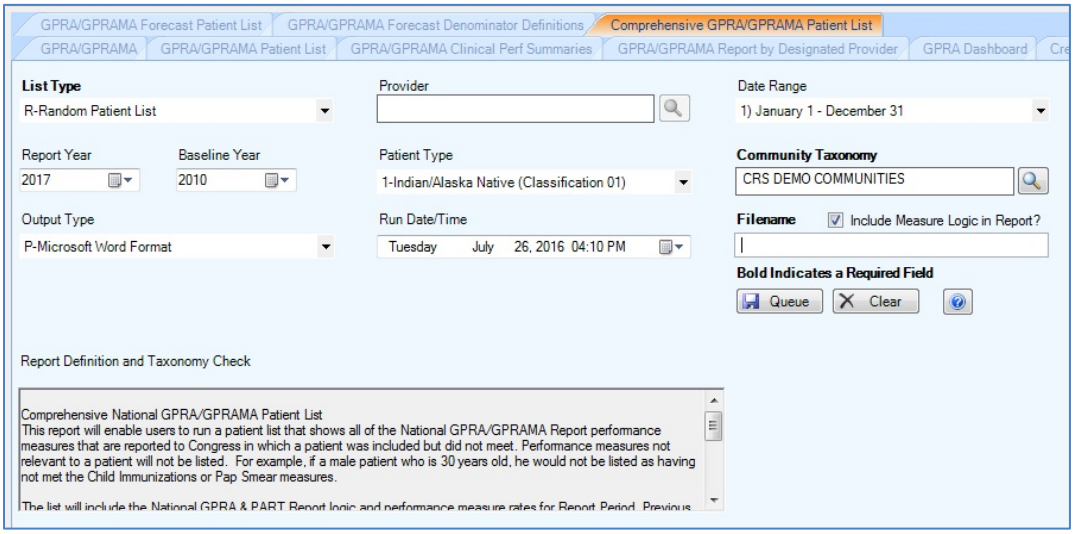


Figure 3-17: Visual CRS **Comprehensive GPRA/GPRAMA Patient List** pane

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

- **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
- **A - All Patients**

5. To set the **Date Range, Report Year** or **Report End**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.
6. From the **Patient Type** list, select one of the following beneficiary populations on which to report:
   - **1 - Indian/Alaska Native (Classification 01)**
   - **2 - Not Indian Alaskan/Native (Not Classification 01)**
   - **3 - All (Both Indian/Alaska Natives and Non-01)**
7. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).
8. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
9. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.
10. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.
11. To view the report, follow the instructions in Section 6.14, View a Completed 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 one community or the communities in a specified community taxonomy.

> **Note:** See Section 5.11.2.1 in the *CRS Version 17.1 User Manual* for additional information on the Selected Measures with Community Specified Report.

To run the Selected Measures with Community Specified report:

1. On the **CRS** ribbon, select **Reports for Local Use: IHS Clinical Measures** from the **Reports** group.

2. Select the **Selected Measures with Community Specified** tab to display the **Selected Measures with Community Specified Report** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-18).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

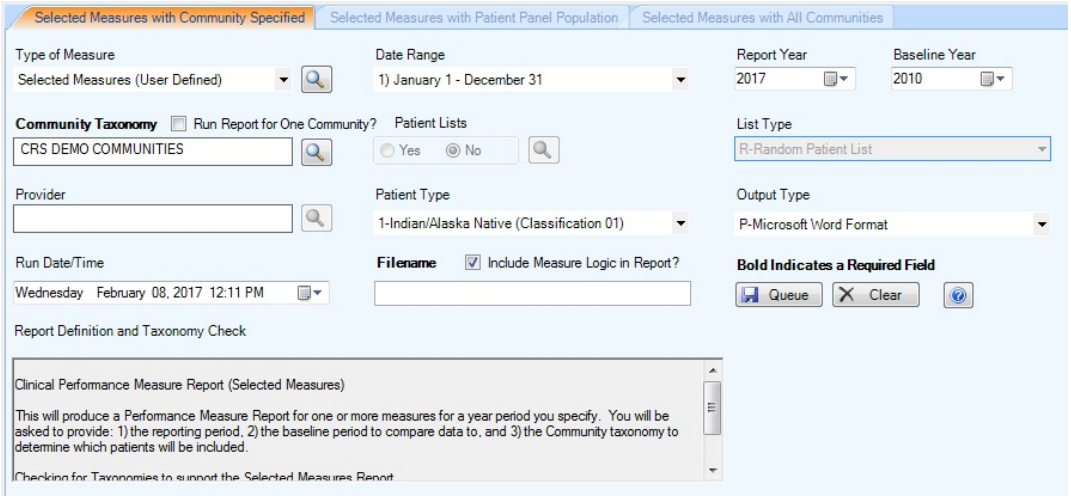


Figure 3-18: Visual CRS **Selected Measures w/Community Specified** pane

4. In the **Type of Measure** list, do one of the following:

   - Select one of the predefined sets of performance measures:
     - Diabetes-Related Measures
     - Cardiovascular Disease Prevention for At-Risk Patients
     - Women's Health-Related Measures

  - Improving Patient Care
  - Pharmacy Quality Alliance
  - Asthma-Related Measures
- Select **Selected Measures (User Defined)**, and then click the Search button next to the **Type of Measure** field to display the **Selected Measures (User Defined) Measures** pane.

  To select measures on which to report, follow the instructions in Selecting Performance Measures (Section 6.10.2).

5. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

6. At the **Community Taxonomy** option, do one of the following:

   - To change the default **Community Taxonomy** value, click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).
   - To run the report by only one community, check the **Run Report for One Community?** checkbox and follow the instructions in Section 6.3, Select a Community.

7. At the **Patient Lists** options, do one of the following:

   - Click **Yes** to generate patient lists with this report, and then click the Search button next to the **Patient Lists** field to display the **Patient Lists** pane. To select patient list measures, follow the instructions in Section 6.10.3 Select Patient Lists.
   - Click **No** to run the report without generating patient lists.

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

8. If you selected **Yes** to patient lists in Step 6, select one of the following in the **List Type** list. Otherwise, skip to Step 9.

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

9. From the **Patient Type** list, select one of the following beneficiary populations on which to report:

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

10. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

11. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

12. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.

13. To view the report, follow the instructions in Section 6.14, View a Completed 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 17.1 User Manual* for additional information on the Selected Measures with Patient Panel Population Report.

To run the Selected Measures with Patient Panel Population report:

1. On the **CRS** ribbon, select **Reports for Local Use: IHS Clinical Measures** from the **Reports** group.

2. Select the **Selected Measures with Patient Panel** tab to display the **Selected Measures with Patient Panel Report** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-19).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

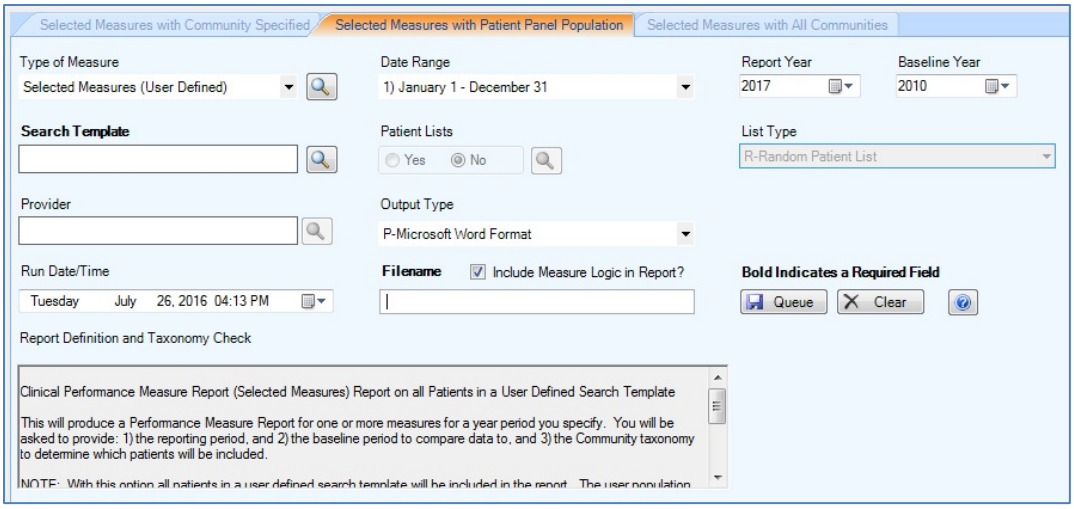


Figure 3-19: Visual CRS **Selected Measures with Patient Panel** pane

4. In the **Type of Measure** list, do one of the following:

   - Select one of the predefined sets of performance measures:
     - Diabetes-Related Measures
     - Cardiovascular Disease Prevention for At-Risk Patients
     - Women's Health-Related Measures
     - Improving Patient Care
     - Pharmacy Quality Alliance
     - Asthma-Related Measures
   - Select **Selected Measures (User Defined)**, and then click the Search button next to the **Type of Measure** field to display the **Selected Measures (User Defined) Measures** pane.

     To select measures on which to report, follow the instructions in Section 6.10.2, Select Performance Measures.

5. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

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

   To select a search template, click the Search button next to the **Search Template** field to display the **Search Template** dialog, and then follow the instructions in Section 6.9.2, Select a Search Template.

7. At the **Patient Lists** options, do one of the following:

- Click **Yes** to generate patient lists with this report, and then click the Search button next to the **Patient Lists** field to display the **Patient Lists** pane. To select patient list measures, follow the instructions in Section 6.10.3 Select Patient Lists.
- Click **No** to run the report without generating patient lists.

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

8. If you selected **Yes** to patient lists in Step 7, select one of the following in the **List Type** list. Otherwise, skip to Step 9.
   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**
9. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
10. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.
11. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.
12. To view the report, follow the instructions in Section 6.14, View a Completed 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 17.1 User Manual* for additional information on the Selected Measures with All Communities Report.

To run the Selected Measures with All Communities report:

1. On the **CRS** ribbon, select **Reports for Local Use: IHS Clinical Measures** from the **Reports** group.

2. Select the **Selected Measures with All Communities** tab to display the **Selected Measures with All Communities Report** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-20).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

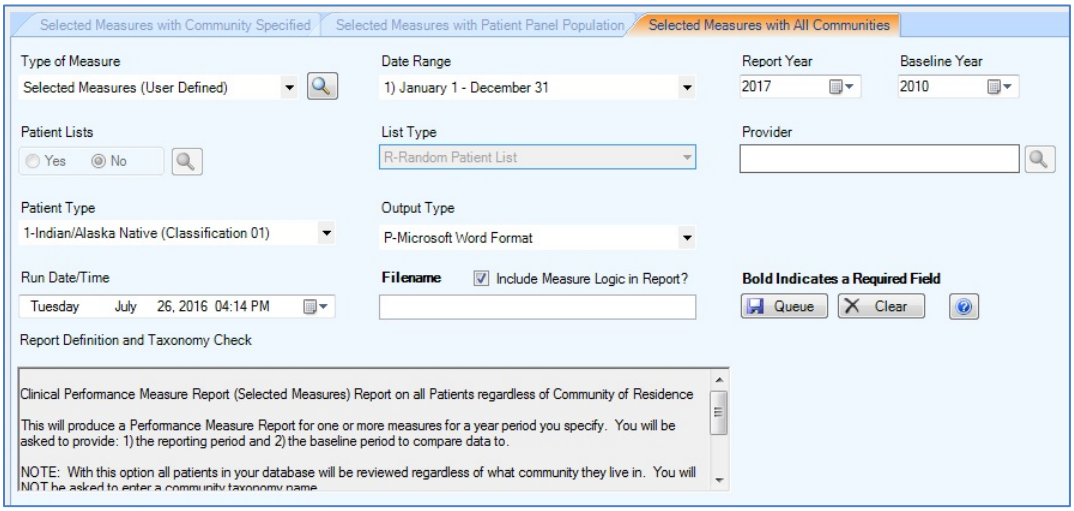


Figure 3-20: Visual CRS **Selected Measures with All Communities** pane

4. In the **Type of Measure** list, do one of the following:

   - Select one of the predefined sets of performance measures:
   - Diabetes-Related Measures
   - Cardiovascular Disease Prevention for At-Risk Patients
   - Women's Health-Related Measures
   - Improving Patient Care
   - Pharmacy Quality Alliance
   - Asthma-Related Measures
   - Select **Selected Measures (User Defined)**, and then click the Search button next to the **Type of Measure** field to display the **Selected Measures (User Defined) Measures** pane.

To select measures on which to report, follow the instructions in Section 6.10.2, Select Performance Measures.

5. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

6. At the **Patient Lists** options, do one of the following:

   - Click **Yes** to generate patient lists with this report, and then click the Search button next to the **Patient Lists** field to display the **Patient Lists** pane. To select patient list measures, follow the instructions in Section 6.10.3 Select Patient Lists.
   - Click **No** to run the report without generating patient lists.

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

7. If you selected **Yes** to patient lists in Step 6, select one of the following in the **List Type** list. Otherwise, skip to Step 8.

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

8. From the **Patient Type** list, select one of the following beneficiary populations on which to report:

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

9. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

10. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

11. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.

12. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.3 Other National Reports

3.3.1 GPRA/GPRAMA Performance Report

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

Note:	See Section 5.12 in the *CRS Version 17.1 User Manual* for additional information on the GPRA/GPRAMA Performance Report.

To run the GPRA/GPRAMA Performance report:

1. On the **CRS** ribbon, select **Other National Reports** from the **Reports** group.
2. Select the **GPRA/GPRAMA Performance Report** tab to display the **GPRA/GPRAMA Performance Report** pane containing information about the report and the results of the taxonomy check.
3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-21).
   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

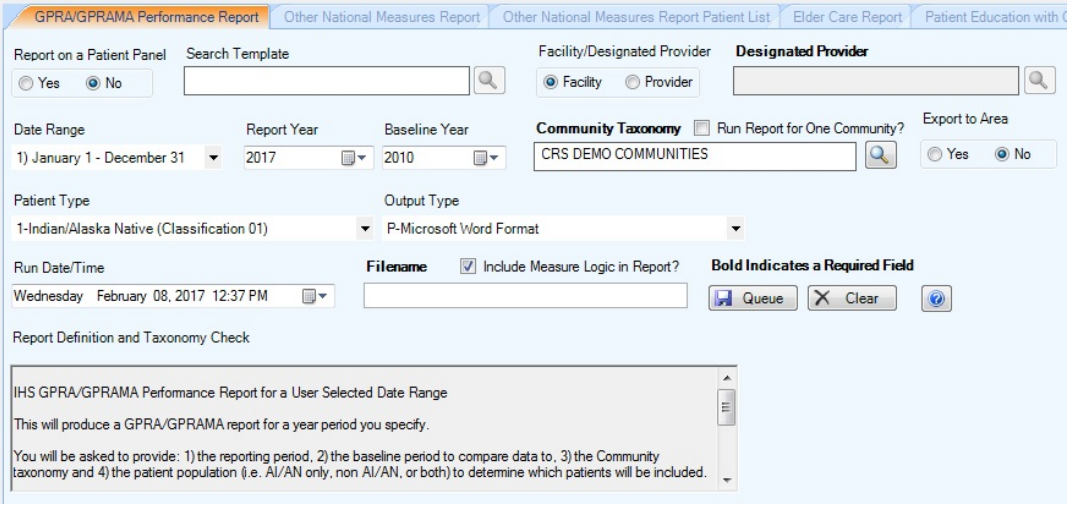


Figure 3-21: Visual CRS **GPRA/GPRAMA Performance Report** pane

4. At the **Report on a Patient Panel** option select **Yes** or **No**.
   - If you select **Yes** and a search template has been selected for a report, the template's name is displayed in the **Search Template** field. If no search template has been selected, the field is empty.
   - To select a search template, click the Search button next to the **Search Template** field to display the **Search Template** dialog, and then follow the instructions in Section 6.9.2, Select a Search Template.
   - If you select **No**, the report will run without using a patient panel.
5. In the **Facility/Designated Provider** option select **Facility** or **Provider**.
   - To select the current facility on which to report, select **Facility**.
   - To select the designated provider on which to report, select **Provider**, click the Search button next to the **Designated Provider** field and follow the instructions in Section 6.6, Select Providers.
6. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.
7. At the **Community Taxonomy** option, do one of the following:
   - To change the default **Community Taxonomy** value, click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).
   - To run the report by only one community, check the **Run Report for One Community?** checkbox and follow the instructions in Section 6.3, Select a Community.

8. At the **Export to Area** options, do one of the following:
   - To send final data to your Area Office, click **Yes**.
   - If you are not ready to send final data to your Area Office, click **No**.
9. From the **Patient Type** field, select one of the following beneficiary populations on which to report:
   - **1 - Indian/Alaska Native (Classification 01)**
   - **2 - Not Indian Alaskan/Native (Not Classification 01)**
   - **3 - All (Both Indian/Alaska Natives and Non-01)**
10. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
11. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.
12. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.
13. To view the report, follow the instructions in Section 6.14, View a Completed 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:

- Using the same hard-coded report parameters (Report Period, Previous Year Period, and Baseline Year) as the National GPRA/GPRAMA Report.
- Using custom, user-defined report parameters.

Note:	See Section 5.13 in the *CRS Version 17.1 User Manual* for additional information on the Other National Measures Report.

3.3.2.1 Run the Other National Measures Report

1. On the **CRS** ribbon, select **Other National Reports** from the **Reports** group.

2. Select the **Other National Measures Report** tab to display the **Other National Measures Report** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-22).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

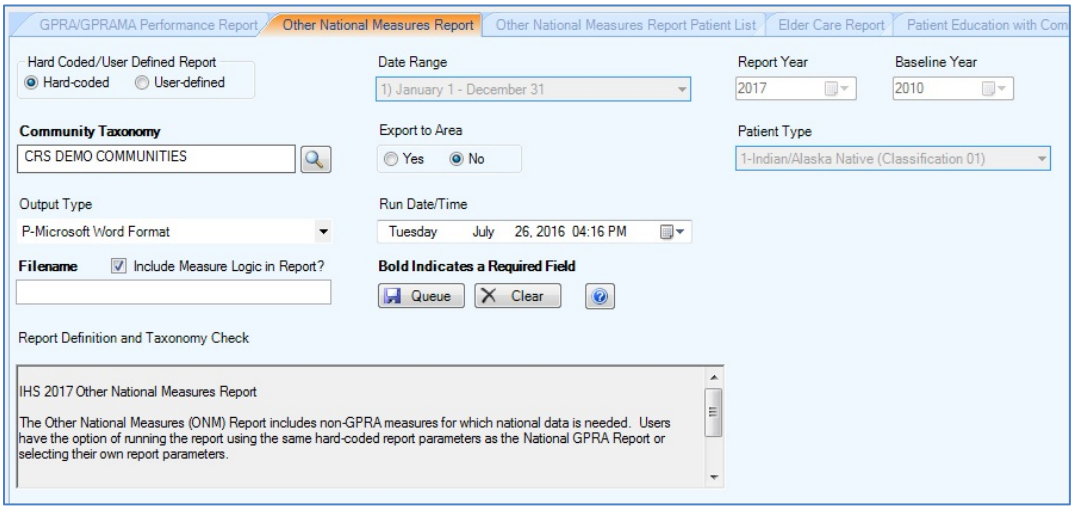


Figure 3-22: Visual CRS **Other National Measures Report** pane

4. At the **Hard-coded/User-defined Report** options, do one of the following:

   - To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in Section 3.3.2.2, Other National Measures Report: Hard-Coded Report Option.
   - To run the report using custom, user-defined parameters, select **User-defined** and follow the instructions in Section 3.3.2.3, Other National Measures Report: User-Defined Report Option.

5. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.3.2.2 Other National Measures Report: Hard-Coded Report Option

Use this option to produce Other National Measures Report (Figure 3-23) for the 2017 GPRA year using the performance measure definitions from CRS Version 17.1. The following parameters are predefined for this report:

- A report period of July 1, 2016 through June 30, 2017
- A baseline year of July 1, 2009 through June 30, 2010
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

To run the Other National Measures Report with hard-coded parameters:

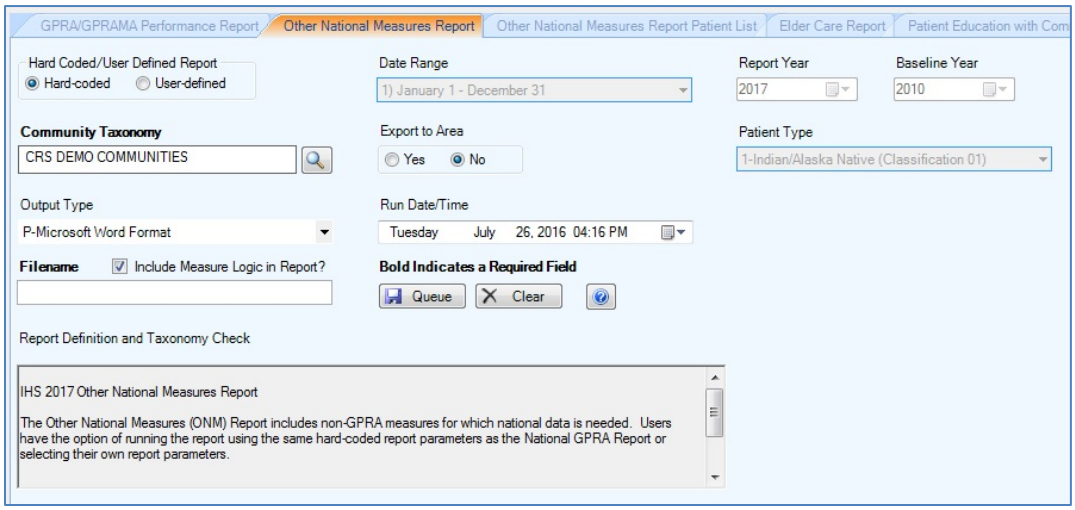


Figure 3-23: Visual CRS **Other National Measures Report** (**Hard-coded Report** option) pane

1. At the **Hard-coded/User-defined Report** options, select **Hard-coded** (default).
2. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).
3. At the **Export to Area** options, do one of the following:
   - To send final data to your Area Office, click **Yes**.
   - If you are not ready to send final data to your Area Office, click **No**.
4. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
5. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

6. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

7. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.3.2.3 Other National Measures Report: User-Defined Report Option

To run the Other National Measures Report with user-defined parameters (Figure 3-24):

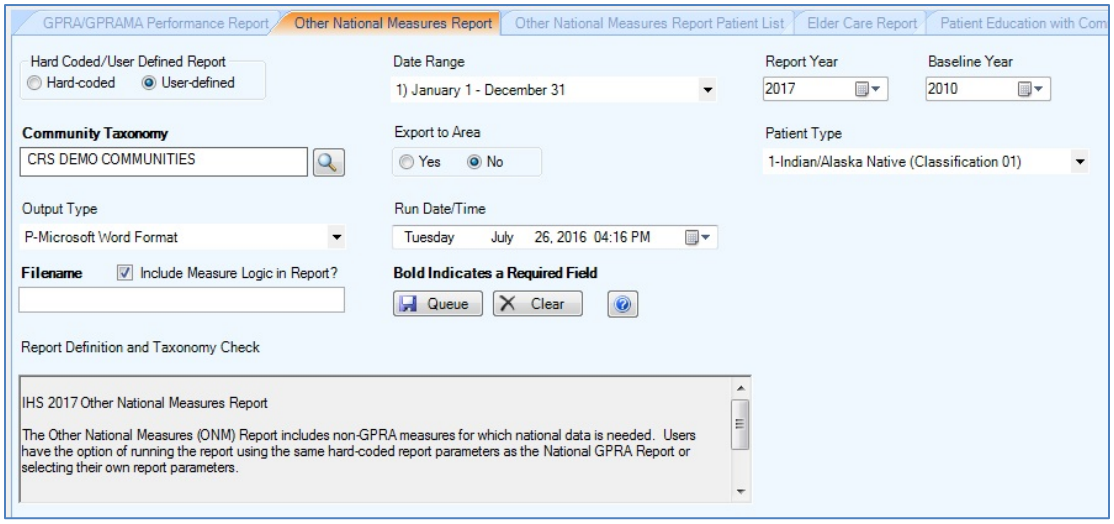


Figure 3-24: Visual CRS **Other National Measures Report** (**User-Defined Report** option) pane

1. At the **Hard-coded/User-defined Report** options, select **User-defined**.

2. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

3. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

4. At the **Export to Area** options, do one of the following:

   - To send final data to your Area Office, click **Yes**.
   - If you are not ready to send final data to your Area Office, click **No**.

5. From the **Patient Type** list, select one of the following beneficiary populations on which to report:

   - **1 - Indian/Alaska Native (Classification 01)**

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

6. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
7. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.
8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.
9. To view the report, follow the instructions in Section 6.14, View a Completed 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 5.14 in the *CRS Version 17.1 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. On the **CRS** ribbon, select **Other National Reports** from the **Reports** group.
2. Select the **Other National Measures Report Patient List** tab to display the **Other National Measures Report Patient List** pane containing information about the report and the results of the taxonomy check.
3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-25).
   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.

- If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

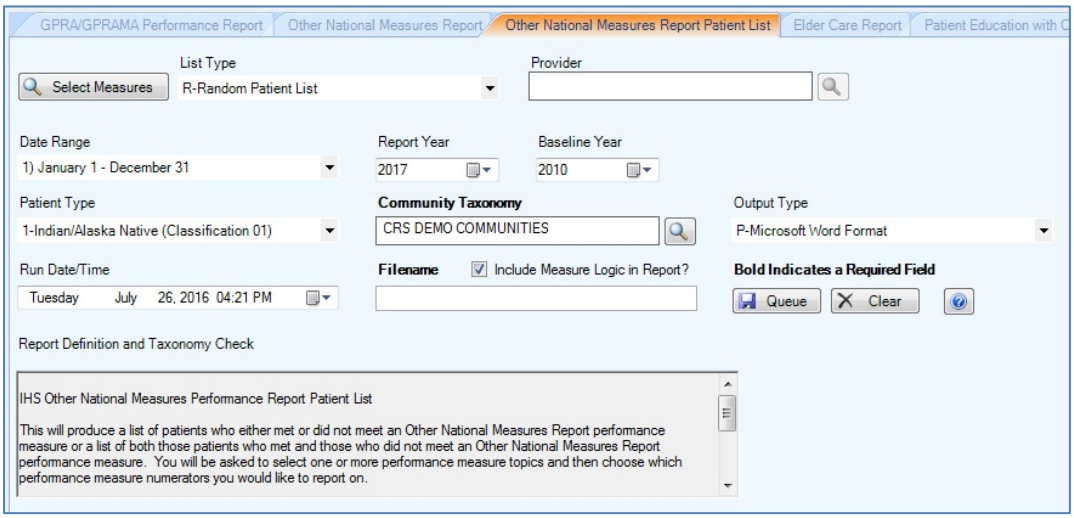


Figure 3-25: Visual CRS **Other National Measures Patient List** pane

4. To select performance measures and patient lists, click **Select Measures** in the top left corner of the report pane and follow the instructions in Section 6.10, Measures and Patient Lists.

5. From the **List Type** list, select one of the following:

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

6. To set the **Date Range, Report Year** or **Report End**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

7. From the **Patient Type** list, select one of the following beneficiary populations on which to report:

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

8. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

9. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

10. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

11. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.

12. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.3.4 Elder Care Report

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

> **Note:** See Section 5.15 in the *CRS Version 17.1 User Manual* for additional information on the Elder Care Report.

3.3.4.1 Run the Elder Care Report

1. On the **CRS** ribbon, select **Other National Reports** from the **Reports** group.

2. Select the **Elder Care Report** tab to display the **Elder Care Report** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-26).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

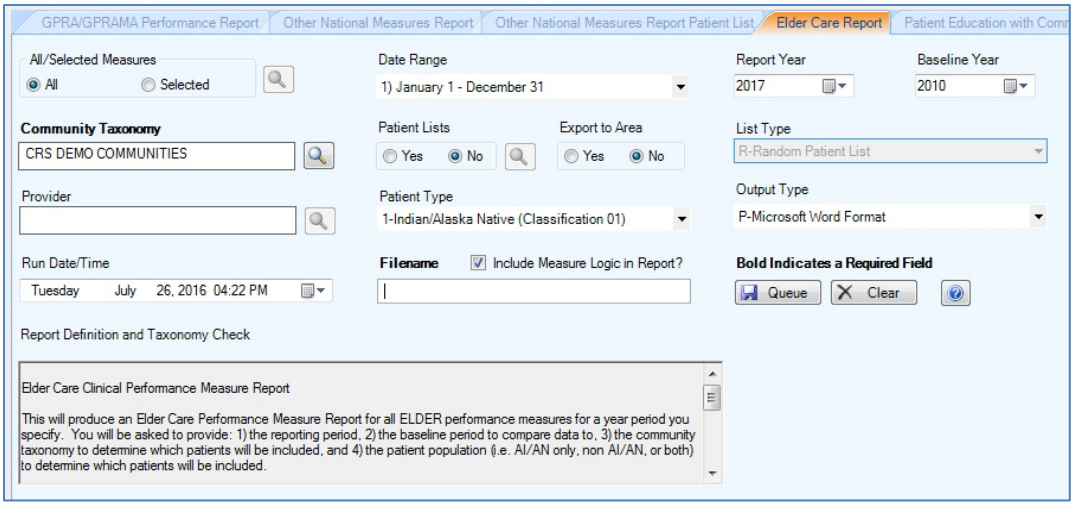


Figure 3-26: Visual CRS **Elder Care Report** pane

4. At the **All/Selected Measures** options, do one of the following:

   - To run this report on all performance measures, select **All**.
   - To select specific performance measures for this report, select **Selected**, and then click the Search button next to the **All/Selected Measures** field to display the **Elder Care Measures** pane.

     To select measures on which to report, follow the instructions in Section 6.10.2, Select Performance Measures.

5. To set the **Date Range, Report Year** or **Report End**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

6. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

7. At the **Patient Lists** options, do one of the following:

   - Click **Yes** to generate patient lists with this report, and then click the Search button next to the **Patient Lists** field to display the **Elder Care Patient Lists** pane. To select patient list measures, follow the instructions in Section 6.10.3 Select Patient Lists.
   - Click **No** to run the report without generating patient lists.

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

8. At the **Export to Area** options, do one of the following:

- To send final data to your Area Office, click **Yes**.
- If you are not ready to send final data to your Area Office, click **No**.

9. If you selected **Yes** to patient lists in Step 6, select one of the following in the **List Type** list. Otherwise, skip to Step 10.

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

10. From the **Patient Type** list, select one of the following beneficiary populations on which to report:

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

11. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

12. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

13. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.

14. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.3.5 Patient Education Reports

3.3.5.1 Patient Education with Community Specified

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

> **Note:** See Section 5.16 in the *CRS Version 17.1 User Manual* for additional information on the Patient Education with Community Specified report.

3.3.5.1.1 Run the Patient Education with Community Specified report

1. On the **CRS** ribbon, select **Other National Reports** from the **Reports** group.

2. Select the **Patient Education with Community Specified** tab to display the **Patient Education with Community Specified Report** pane containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-27).

   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

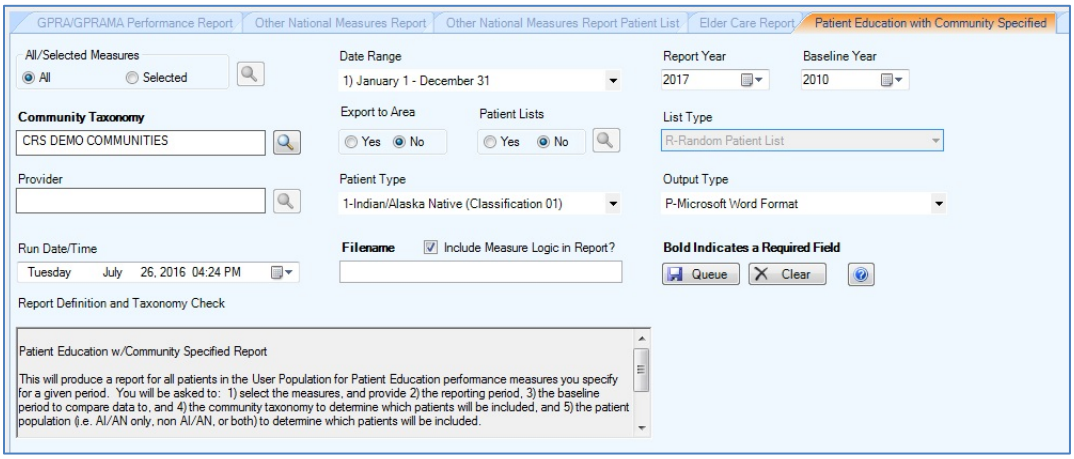


Figure 3-27: Visual CRS **Patient Education with Community Specified** pane

4. At the **All/Selected Measures** options, do one of the following:

   - To run this report on all performance measures, select **All**.
   - To select specific performance measures for this report, select **Selected**, and then click the Search button next to the **All/Selected Measures** field to display the **Patient Education Measures** pane.

     To select measures on which to report, follow the instructions in Section 6.10.2, Select Performance Measures.

5. To set the **Date Range, Report Year** or **Report End**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

6. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

7. At the **Patient Lists** options, do one of the following:

   - Click **Yes** to generate patient lists with this report, and then click the Search button next to the **Patient Lists** field to display the **Patient Education Patient Lists** pane. To select patient list measures, follow the instructions in Section 6.10.3 Select Patient Lists.
   - Click **No** to run the report without generating patient lists.

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

8. At the **Export to Area** options, do one of the following:

   - To send final data to your Area Office, click **Yes**.
   - If you are not ready to send final data to your Area Office, click **No**.

9. If you selected **Yes** to patient lists in Step 6, select one of the following in the **List Type** list. Otherwise, skip to Step 10.

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

10. From the **Patient Type** list, select one of the following beneficiary populations on which to report:

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

11. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

12. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

13. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.

14. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.3.5.2 Patient Education with 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 5.17 in the *CRS Version 17.1 User Manual* for additional information on the Patient Education with Patient Panel Population report.

3.3.5.2.1 Run the Patient Education with Patient Panel Population report

1. On the **CRS** ribbon, select **Other National Reports** from the **Reports** group.
2. Select the **Patient Education with Patient Panel Population** tab to display the **Patient Education with Patient Panel Population Report** pane containing information about the report and the results of the taxonomy check.
3. Scroll to the bottom of the **Report Definition and Taxonomy Check** field (Figure 3-28).
   - If the message **All taxonomies are present** is displayed then the taxonomies required for all National GPRA/GPRAMA Reports have been set up and populated.
   - If a message is displayed stating that one or more taxonomies are missing or have no entries, set up the taxonomies following the instructions in Section 4.1.2, Set Up Taxonomies before running any of the National GPRA/GPRAMA reports.

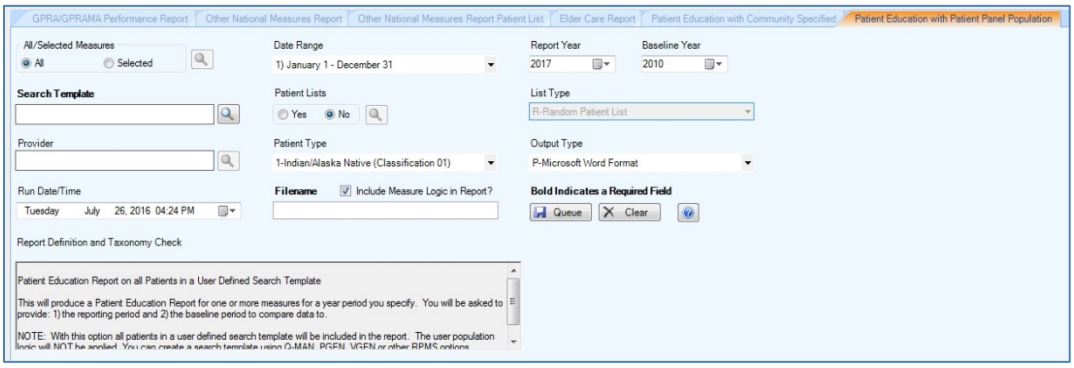


Figure 3-28: Visual CRS **Patient Education with Patient Panel** pane

4. At the **All/Selected Measures** options, do one of the following:
   - To run this report on all performance measures, select **All**.

- To select specific performance measures for this report, select **Selected**, and then click the Search button next to the **All/Selected Measures** options to display the **Patient Education Measures** pane.

  To select measures on which to report, follow the instructions in Section 6.10.2, Select Performance Measures.

5. To set the **Date Range, Report Year** or **Report End**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

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

   To select a search template, click the Search button next to the **Search Template** field to display the **Search Template** dialog, and then follow the instructions in Section 6.9.2, Select a Search Template.

7. At the **Patient Lists** options, do one of the following:

   - Click **Yes** to generate patient lists with this report, and then click the Search button next to the **Patient Lists** field to display the **Patient Education Patient Lists** pane. To select patient list measures, follow the instructions in Section 6.10.3 Select Patient Lists.
   - Click **No** to run the report without generating patient lists.

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

8. If you selected **Yes** to patient lists in Step 7, select one of the following in the **List Type** list. Otherwise, skip to Step 9.

   - **R - Random Patient List**
   - **P - Patient Lists by Provider**. To select a provider, click the Search button next to the **Provider** field and follow the instructions in Section 6.6, Select Providers.
   - **A - All Patients**

9. From the **Patient Type** list, select one of the following beneficiary populations on which to report:

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

10. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

11. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

12. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

    To cancel or reset the report parameters without queuing the report, click **Clear**.

13. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.4 Taxonomy Reports

3.4.1 Lab Taxonomy Reports

Lab taxonomy reports are available for the following CRS reports:

- National GPRA/GPRAMA Report and the GPRA/GPRAMA Performance Report
- Other National Measures Report
- Selected Measures Reports
- Elder Care Report

Note: See Section 5.18 in the *CRS Version 17.1 User Manual* for additional information on the lab taxonomy reports.

3.4.1.1 Run a Lab Taxonomy Report

1. On the **CRS** ribbon, select **Taxonomy Reports** from the **Reports** group.

2. Select the **Lab Taxonomies** tab to display the **Lab Taxonomies Report** pane (Figure 3-29) containing information about the report and the results of the taxonomy check.

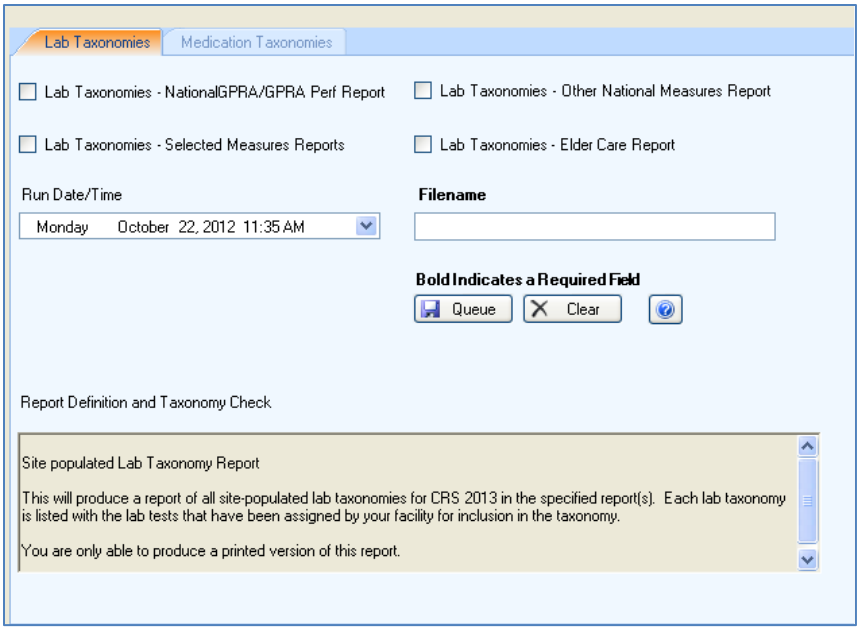


Figure 3-29: Visual CRS **Lab Taxonomy Report** pane

3. Check one or all of the taxonomy reports to run.
4. To change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
5. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.
6. To view the report, follow the instructions in Section 6.14, View a Completed Report.

3.4.2 Medication Taxonomy Reports

Medication taxonomy reports are available for the following CRS reports:

- National GPRA/GPRAMA Report and the GPRA/GPRAMA Performance Report
- Other National Measures Report
- Selected Measures Reports
- Elder Care Report

Note:	See Section 5.19 in the *CRS Version 17.1 User Manual* for additional information on the medication taxonomy reports.

3.4.2.1 Run a Medication Taxonomy Report

1. On the **CRS** ribbon, select **Taxonomy Reports** from the **Reports** group.
2. Select the **Medication Taxonomies** tab to display the **Medication Taxonomies** pane (Figure 3-30) containing information about the report and the results of the taxonomy check.

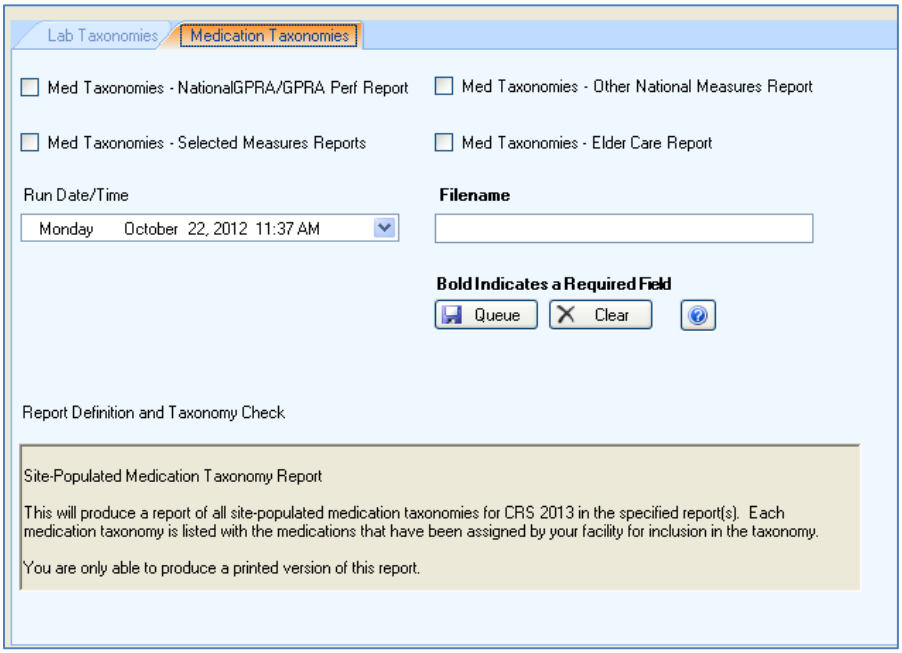


Figure 3-30: Visual CRS **Medication Taxonomies** pane

3. Check one or all of the taxonomy reports to run.
4. To change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
5. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.
6. To view the report, follow the instructions in Section 6.14, View a Completed Report.

4.0 Set Up Visual CRS

4.1 Taxonomies

4.1.1 Check Taxonomies

Before running a report, the taxonomies required for the report must be set up and populated in Visual CRS. 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, you should expect to see a list of taxonomies that are new to the software and have no entries. Taxonomies that existed before the Visual CRS Version 17.1 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 Other National Measures or Elder Care reports, you can skip those taxonomy checks.

> **Note:** See Section 4.5 in the *CRS Version 17.1 User Manual* for additional information on the Taxonomy Check options.

To check taxonomies for a report:

1. On the **CRS** ribbon, select **Taxonomy Check** from the **Setup** group.
2. Select the **Taxonomy Checks** tab to display the **Taxonomy Checks Report** pane (Figure 4-1) containing information about the report and the results of the taxonomy check.

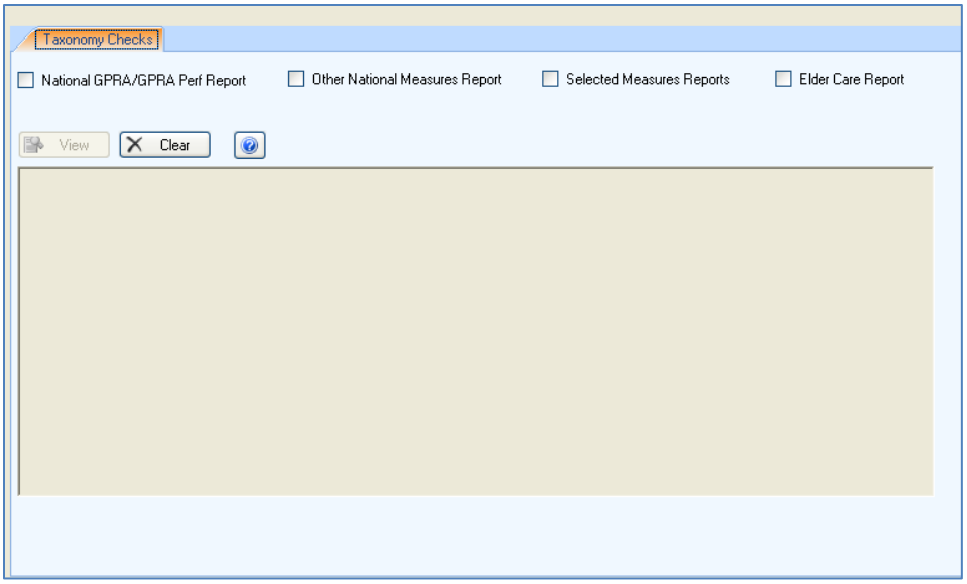


Figure 4-1: Visual CRS **Taxonomy Check** pane

3. Check one or all of the taxonomies to be checked.

4. To run the taxonomy check for each checked taxonomy, click **View**.

   To cancel or reset the report parameters without verifying the taxonomies, click **Clear**.

   - If all taxonomies required for the report have been set up and populated, a message is displayed stating that all taxonomies are present.
   - If all taxonomies required for a report have not been set up and populated, a message is displayed stating that one or more taxonomies are missing or have no entries. Use **Taxonomy Setup** option (Section 4.1.2, Set Up Taxonomies) to add the missing taxonomies before running the report.

Note:	See Section 4.6 in the *CRS Version 17.1 User Manual* for additional information on setting up taxonomies.

After all required taxonomies have been set up, repeat Steps 1 through 4 to run the taxonomy check again and verify all taxonomies are present before running the report.

4.1.2 Set Up Taxonomies

Before running a report, the taxonomies required for the report must be set up and populated in Visual CRS. 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.

Notes:

All taxonomies should be reviewed for completeness, even though many of the taxonomies used by CRS have already been established and populated by other RPMS applications (e.g., Diabetes Management) or by CRS Version 16.1.

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 4.6 in the *CRS Version 17.1 User Manual* for additional information on setting up taxonomies.

To set up taxonomies:

1. On the **CRS** ribbon, select **Taxonomy Setup** in the **Setup** group.
2. Select the **Taxonomy Setup** tab to display the **Taxonomy Setup** pane (Figure 4-2).

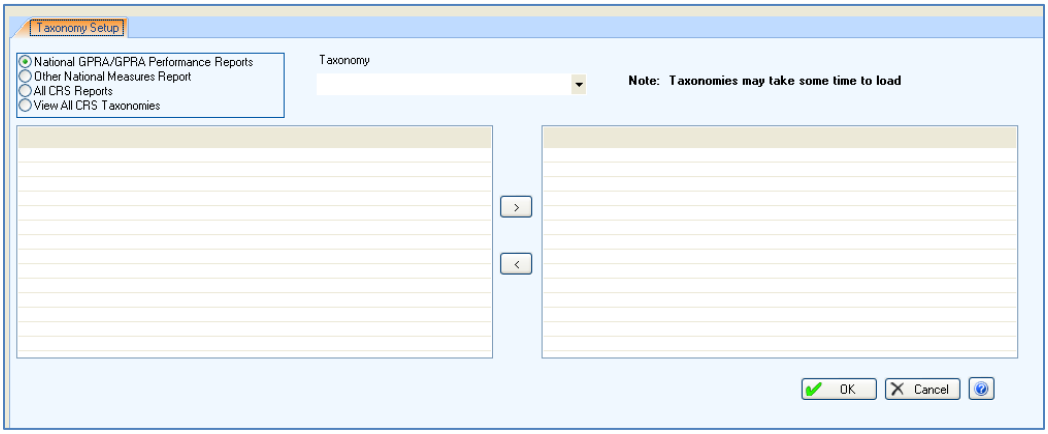


Figure 4-2: Visual CRS **Taxonomy Setup** pane

3. Check the report option for the taxonomies to set up (e.g., **National GPRA/GPRA Performance Reports, Other National Measures Reports, All CRS Reports**).
4. Click the menu arrow in the **Taxonomy** field 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.

Note: Taxonomies may take some time to load.

Figure 4-3 shows the DM AUDIT LDL CHOLESTEROL TAX taxonomy. The **Available Taxonomy Items** (the left pane) are available to be added to the taxonomy, while the current members of the taxonomy appear in the **Selected Taxonomy Items** list (the right pane).

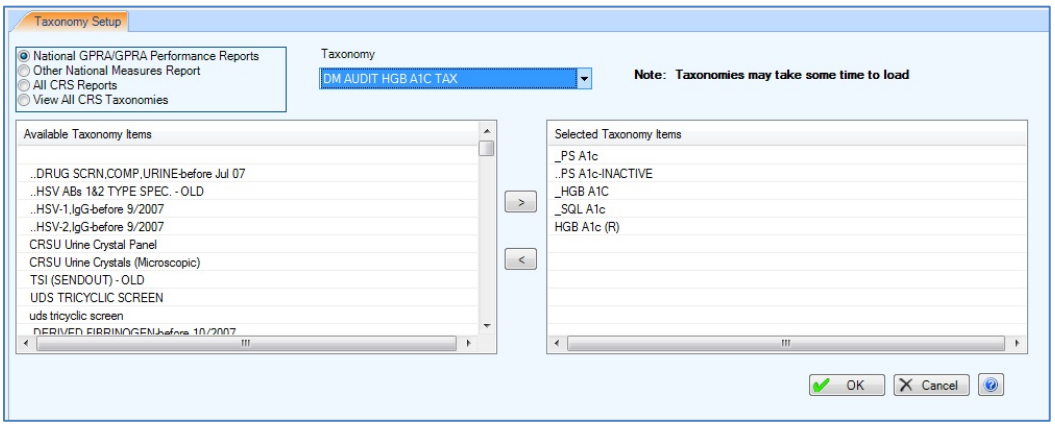


Figure 4-3: Visual CRS **Add/Edit Taxonomy** pane

5. To add or remove items, do one of the following:

   - To add an item to the taxonomy, click an item in the **Available Taxonomy Items** list to select it (selected items appear highlighted in blue), and then click the Right Arrow button (› - a small button displaying a right-pointing arrowhead) to move it to the **Selected Taxonomy Items** list.

   - To add multiple items, select contiguous items by holding down the SHIFT key, or select noncontiguous items by holding down the CTRL key, and clicking the items. Click the Right Arrow button to move the selected items to the **Selected Taxonomy Items** list. To remove an item from the taxonomy, click an item in the **Selected Taxonomy Items** list to select it (selected items appear highlighted in blue), and then click the Left Arrow button (‹ - a small button displaying a left-pointing arrowhead) 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, and clicking the items. Click the Left Arrow button to move the selected items to the **Available Taxonomy Items** list.

6. To save changes to the taxonomy, click **OK**.

7. To cancel any changes *not* saved and reset the current selected taxonomy, click **Cancel**.

4.1.3 View Existing Taxonomies

To view all CRS taxonomies as read-only in the **View Taxonomy** pane, including both site-populated lab and medication taxonomies and hard-coded taxonomies (such as those for International Classification of Diseases, Tenth Revision (ICD-10) and Current Procedural Terminology (CPT) codes included in the CRS definitions):

1. On the **CRS** ribbon, select **Taxonomy Setup** from the **Setup** group.
2. Select the **Taxonomy Setup** tab to display the **Taxonomy Setup** pane (Figure 4-4).

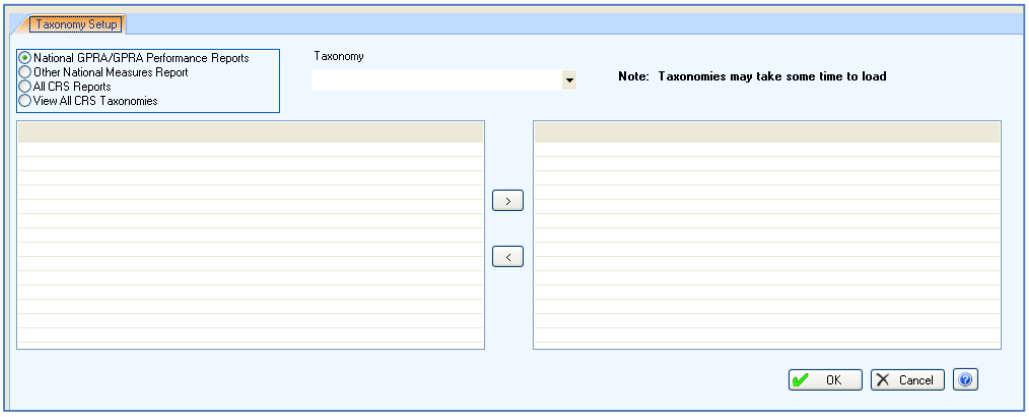


Figure 4-4: Visual CRS **Taxonomy Setup** pane

3. Check the **View All CRS Taxonomies** option.
4. Click the menu arrow in the **Taxonomy** field to display a list of site-populated taxonomies for the selected report, and then click the taxonomy you want to view. The items currently in the taxonomy and the items available to be added are displayed.

Note: Taxonomies may take some time to load.

Figure 4-5 shows the read-only view of the BGP PQA CONTROLLER MEDS taxonomy.

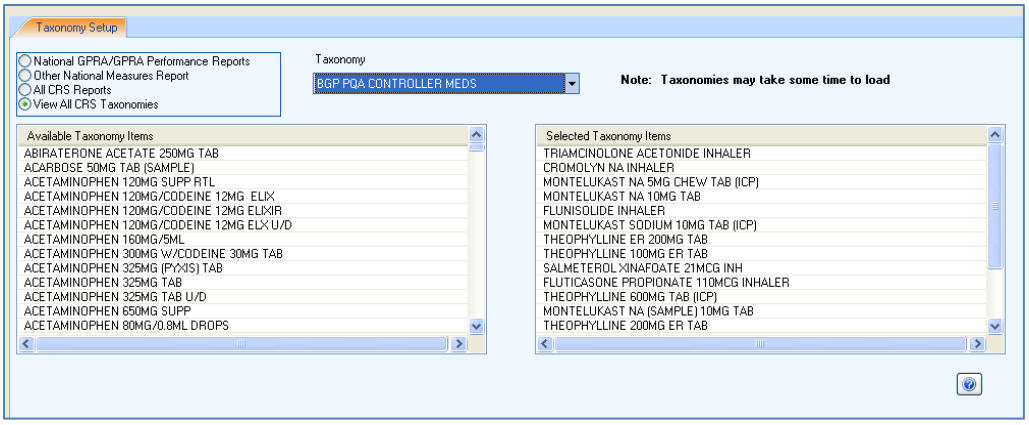


Figure 4-5: Visual CRS **Taxonomy Setup** read-only pane

4.2 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 Default Home Location
- The site's default Directory For Export Files

> **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** field at the top of the **Site Parameter**s pane. 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 **Site Parameters** pane to set up a site in CRS for the first time.

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

- Select the location to set site parameters (Section 4.2, Site Parameters)
- Set site parameters (Section 4.2, Site Parameters)

> **Note:** See Section 4.2 in the *CRS Version 17.1 User Manual* for additional information on each of the site parameters set using this option.

4.2.1 Select the Location to Set Site Parameters

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

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

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

To change the location for which you run reports:

1. Select **Change Division** from the **Menu** button (see Section 2.1, Menu Button) at the top of the **Visual CRS** window to display the **Change Division** pane.
2. Select the new location by doing one of the following:
   - If the multi-divisional database contains data for Facilities A, B, and C and you are logged on to Facility A, edit the site parameters for Facilities B and C by selecting them in the **Location** field. However, your CRS reports would still be run for Facility A.
   - To run reports for a different facility, select **Change Division** and select the new facility as described in the previous sequence.

To select a location to set site parameters:

1. On the **CRS** ribbon, select **Site Parameters** from the **Setup** group.
2. Select the **Site Parameters** tab to display the **Site Parameters** pane (Figure 4-6).

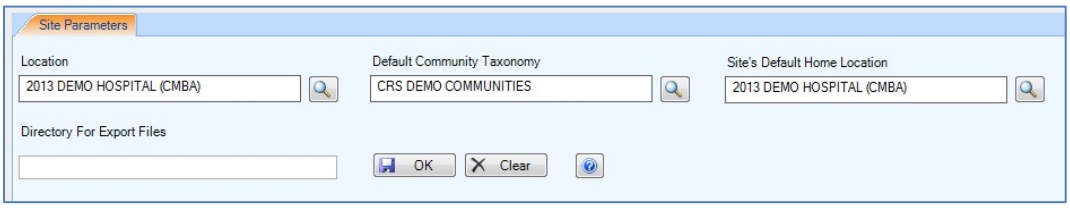


Figure 4-6: Visual CRS **Site Parameters** pane

3. If necessary, change the location by clicking the Search button next to the **Location** field to display the **Edit Site Parameters** dialog (Figure 4-7).

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

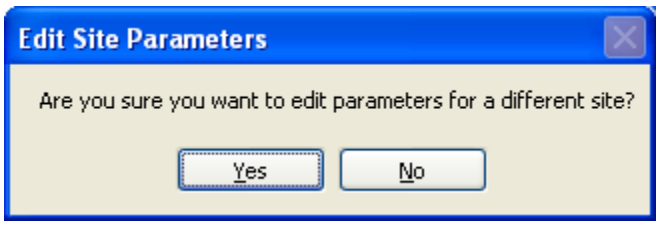


Figure 4-7: Visual CRS **Edit Site Parameters** dialog

– Click **Yes** (edit site parameters for a different location) to display the **Location** dialog and then follow the instructions in Selecting a Location (Section 6.4, Select a Location).

Click **No** to return to the **Site Parameters** pane and continue with the instructions for setting site parameters.

4. Continue with the instructions for setting site parameters (see Section 4.3.1, Set Site Parameters).

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

4.2.2 Set Site Parameters

To set site parameters for the location displayed in the **Location** field:

1. If necessary, set, change, or remove the **Default Community Taxonomy** value:

   - To set or change the value that will be used for CRS reports, click the Search button next to the **Default Community Taxonomy** field and follow the instructions in Section 6.2.1, Select a Taxonomy.
   - To remove the value, right click the value and select **Clear** from the menu.

> **Note:** If the RPMS server has multiple databases representing multiple facilities, you may not want to set a default Community taxonomy to ensure users will define a specific Community taxonomy each time a report is run.
> See Section 4.2 in the *CRS Version 17.1 User Manual* for information about this site parameter.

2. If necessary, set, change, or remove the **Site's Default Home Location** value:

   - To set or change the value that will be used to report Public Health Nursing home visits by your installation of CRS, click the Search button next to the **Site's Default Home Location** field and follow the instructions in Section 6.4, Select a Location.
   - To remove the value, right click the value and select **Clear** from the menu.

Note:	See Section 4.2 in the *CRS Version 17.1 User Manual* for information about this site parameter.

3. At **Directory For Export Files**, type the default directory location where the site's export files are to be created.

Note:	Check with the site manager before editing this field. If the path entered does not exist, then the Area Export files will not be created. See Section 4.2 of the *CRS Version 17.1 User Manual* for information about this site parameter.

4. To save the settings, click **OK** to display the **Saved** dialog (Figure 4-8). To cancel any changes not saved and reset the site parameters to their original settings, click **Clear**.

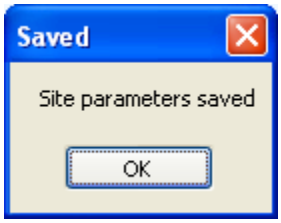


Figure 4-8: Visual CRS **Saved** dialog

5. Click **OK**.

4.3 Automate Reports

Setting up automated GPRA reports will allow an Area to produce Area GPRA reports of their facilities' data automatically each month. In order to do this, a member of the Area must access the Report Automation menu of CRS at each facility in order to set up the facility reports to run. The reports will automatically be run at 10pm on the first Friday of every month. If available, the facility files will be automatically transferred to a specified server at the Area. If all facility files are present, the Area aggregate report will automatically run at 12pm on the second Friday of every month.

Note:	Users must have the BGPZAREA security key to display the Report Automation menu option and set up the GPRA

report automation. See Section 4.3 in the *CRS Version 17.1 User Manual* for information about this site parameter.

4.3.1 Set up Automated GPRA Extract

To set up or edit the **Set up Automated GPRA Extract** report for a facility:

Note: See Section 4.3.1 in the *CRS Version 17.1 User Manual* for additional information on the Set up Automated GPRA Extract.

1. On the **CRS** ribbon, select **Report Automation** in the **Setup** group.
2. Select the **Set up Automated GPRA Extract** tab to display the **Set up Automated GPRA Extract** pane (Figure 4-9).

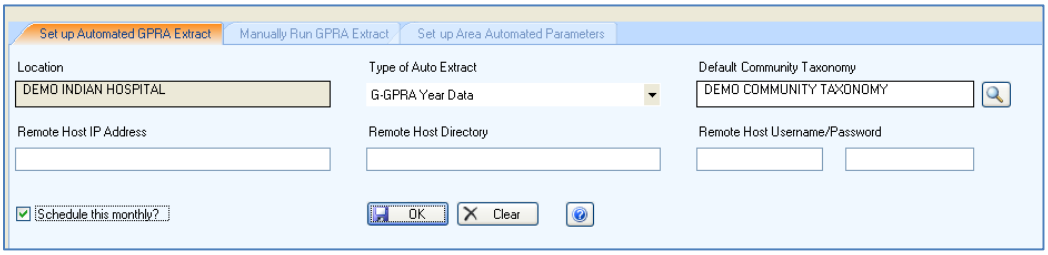


Figure 4-9: Visual CRS **Set up Automated GPRA Extract** pane

Note: The location name displayed in the **Location** field will be the site to which the user with security access to this function is logged on.

3. At the **Type of Auto Extract** field, do one of the following:
   - Select **G-GPRA Year Data** to extract the automated report for the GPRA year. This will extract the GPRA year to date National GPRA report. The time period will always be July 1 through June 30 of the current GPRA year.
   - Select **T-Trending Data (30 Day)** to extract the automated report for trending data.

Note: This time period will be calculated as follows: Subtract 60 days from the date the report is being run. It then determines the last day of that month and uses that day as the end date of the report period. The first day of the report period is calculated as 364 days prior to that date.

Example 1:

- Date report is run is 4/30/2017

- Ending date is 03/31/2017
- Beginning date is 4/02/2016

Example 2:

- Date report is run is 06/01/2017
- Ending date is 04/30/2017
- Beginning date is 05/02/2016

4. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

5. At the **Remote Host IP Address** field, type the IP address of the Area Office computer to which the GPRA files will be sent. You can get this IP address from your Area Office IT personnel.

6. At the **Remote Host Directory** field, type the directory in which the GPRA export files will be placed when they reach the Area Office (Host) System. You can get this IP address from your Area Office IT personnel

7. At the **Remote Host Username/Password** fields, do the following:

   a. In the first field, type the username that will be used to log on to the Area Office system when sending the GPRA export files. You can get this IP address from your Area Office IT personnel.

   b. In the second field, type the password that will be used to log on to the Area Office system when sending the GPRA export files. You can get this IP address from your Area Office IT personnel.

8. To schedule, delete, or unschedule the automated GPRA extract report, do one of the following:

   - If the selected location does not currently have an automated GPRA extract report scheduled, select **Schedule this monthly**
   - If the selected location currently has an automated GPRA extract report scheduled, the report parameters will be automatically generated, do one of the following:
     – To make report parameter changes, repeat Steps 3 through 7.
     – To delete or unsubscribe to the automated GPRA extract, select **Delete/Unschedule the Auto Extract Task**

9. To save the report parameters, click **OK**. Click **OK** on the **Saved** dialog (Figure 4-10).

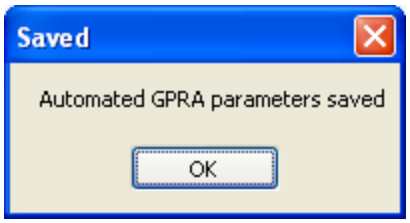


Figure 4-10: Visual CRS **Set up Automated GPRA Extract** report **Saved** dialog

- To cancel or reset the report parameters without saving, click **Clear**.

4.3.2 Manually Run GPRA Extract

It may be necessary to manually run the GPRA report for a facility, for example if the automated GPRA report fails to complete successfully.

> **Note:** See Section 4.3.2 in the *CRS Version 17.1 User Manual* for additional information on the Manually Run GPRA Extract.

If the Automated GPRA Extract report parameters have not been set up, click **OK** on the **Missing Parameters** dialog (Figure 4-11) and set up the Automated GPRA Extract report parameters (see Section 4.5.1, Set up Automated GPRA Extract).

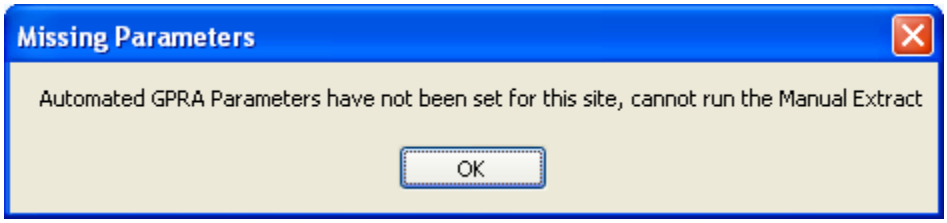


Figure 4-11: Visual CRS **Manually Run GPRA Extract** report **Missing Parameters** dialog

To run the **Manually Run GPRA Extract** report for a facility:

1. On the **CRS** ribbon, select **Report Automation** from the **Setup** group.
2. Select the **Manually Run GPRA Extract** tab to display the **Manually Run GPRA Extract** pane (Figure 4-12).

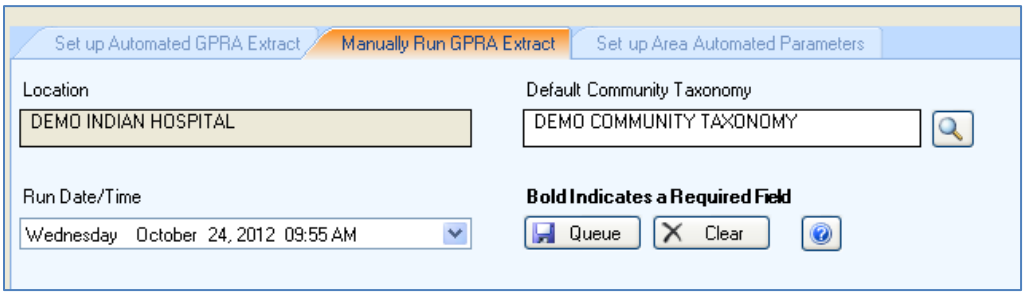


Figure 4-12: Visual CRS **Manually Run GPRA Extract** pane

> **Note:** The location name displayed in the **Location** field will be the site to which the user with security access to this function is logged on.

3. To change the default **Community Taxonomy** value, by click the adjacent Search button and follow the instructions in Section 6.2.1, Select a Taxonomy (the site's default community taxonomy is defined using the Site Parameters option).

4. To queue the report to run at the time specified at **Run Date/Time**, click **Queue**. The report will be queued to the **Remote Host Directory** in the **Set up Automated GPRA Extract** site parameters file, click **OK** on the **Queued** dialog (Figure 4-13).

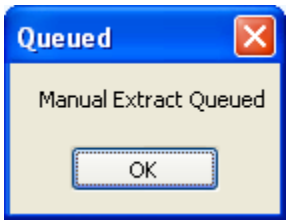


Figure 4-13: Visual CRS **Manually Run GPRA Extract** report **Queued** dialog

To cancel or reset the report parameters without queuing the report, click **Clear**.

4.3.3 Set up Area Automated Parameters

Once set up, the Area Aggregate report will run automatically only if the Area has received files from all facilities listed in the setup. To set up or edit the automated Area aggregate GPRA report:

> **Note:** See Section 4.3.3 in the *CRS Version 17.1 User Manual* for additional information on the Set up Area Automated Parameters.

1. On the **CRS** ribbon, select **Report Automation** from the **Setup** group.

2. Select the **Set up Area Automated Parameters** tab to display the **Set up Area Automated Parameters** pane (Figure 4-14).

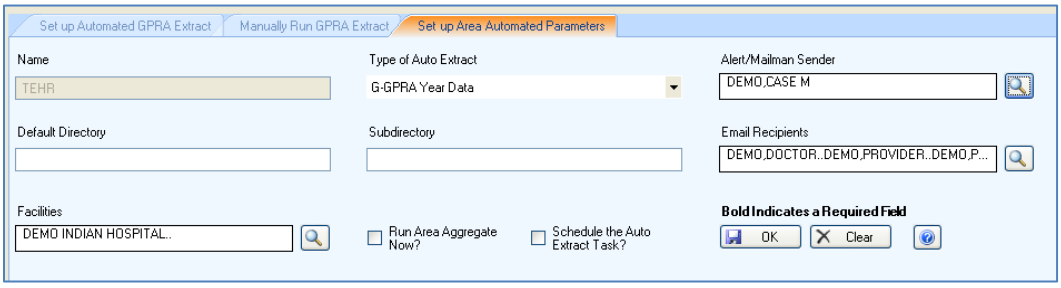


Figure 4-14: Visual CRS **Set up Area Automated Parameters** pane

3. At the **Name** field, enter a unique name for the parameters setup name (e.g., DemoArea).

> **Note:** If the name parameter has been configured, the Name field will be disabled and cannot be changed.

4. At the **Type of Auto Extract**, do one of the following:

   - Select **G-GPRA Year Data** to extract the automated report for the GPRA year. This will extract the GPRA year to date National GPRA report. The time period will always be July 1 through June 30 of the current GPRA year.
   - Select **T-Trending Data (30 Day)** to extract the automated report for trending data.

> **Note:** This time period will be calculated as follows: Subtract 60 days from the date the report is being run. It then determines the last day of that month and uses that day as the end date of the report period. The first day of the report period is calculated as 364 days prior to that date.

Example 1:

- Date report is run is 4/30/2017
- Ending date is 03/31/2017
- Beginning date is 4/02/2016

Example 2:

- Date report is run is 06/01/2017
- Ending date is 04/30/2017
- Beginning date is 05/02/2016

5. At **Alert/Mailman Sender**, click the Search button next to the **Alert/Mailman Sender** field to display the **Alert/Mailman Sender** dialog (Figure 4-15).

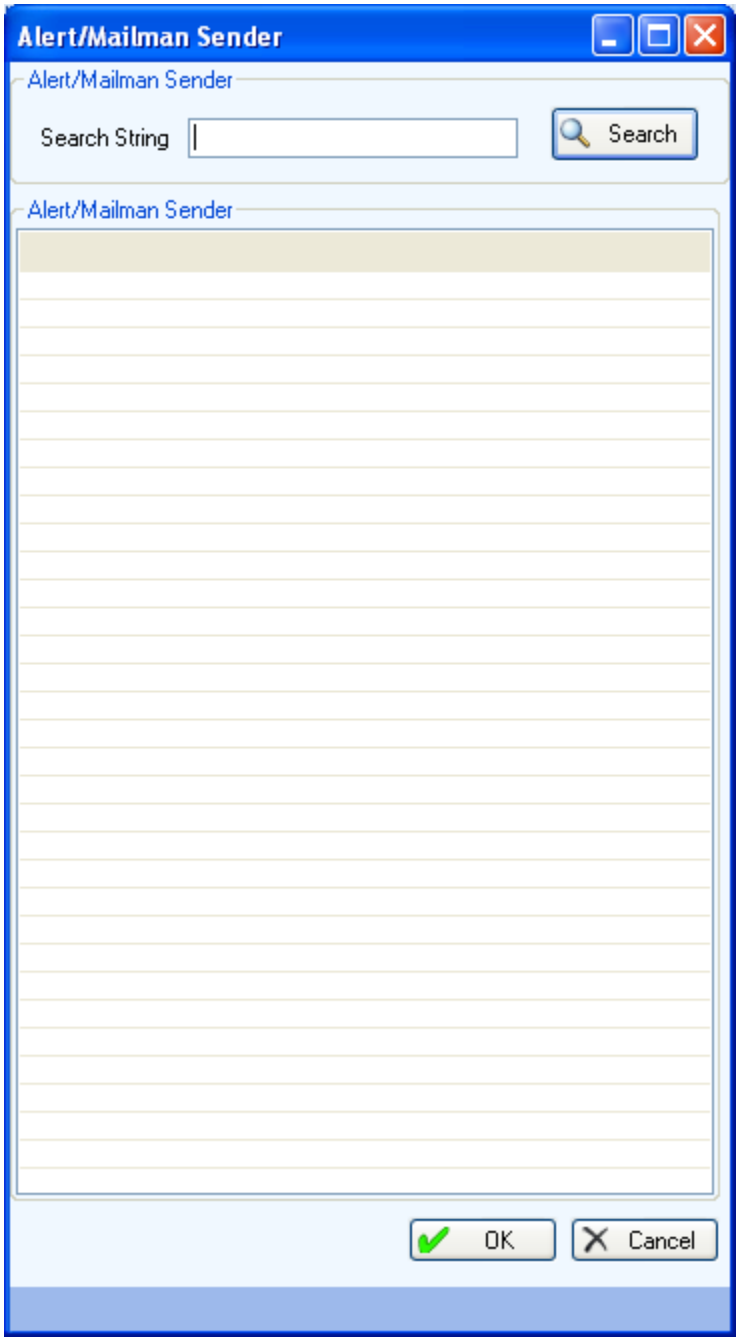


Figure 4-15: Visual CRS **Set up Area Automated Parameters** report **Alert/Mailman Sender** dialog

6. To locate a specific user to be listed as the sender of any alert messages, do one of the following:

   - To display all the available users in the **Alert/Mailman Sender** list, leave the **Search String** field blank and click **Search**.

> **Note:** The entire list of available users may be very long. Users are displayed as Last Name,First Name (e.g., DEMO,DOCTOR).

- Use the **Search String** field to filter the available alert/mailman sender list.
  - To display all available users whose last name begins with a specific letter, type the letter in the **Search String** field and click **Search**.
  - To display all available users whose last names begin with a sequence of letters, type the letters at the beginning of the sequence in the **Search String** field and click **Search**.

> **Note:** Letters in the **Search String** field will be *included* in the filtered list.

7. Scroll through the **Alert/Mailman Sender** list to locate the user you want to use and click the user's name to highlight it.

> **Note:** After the user has been highlighted, the user's name will be displayed in the Search String field.

8. When you have selected the correct user for the report, click **OK** to save and close the **Alert/Mailman Sender** dialog.

   To close the **Alert/Mailman Sender** dialog without saving your selection, click **Cancel**.

9. At the **Default Directory** field, type the directory to which the facilities' files have been sent.

10. At the **Subdirectory** field, type the directory where the Area files should be placed on the server.

11. Click the **Search** button next to the **Email Recipients** field to display the **Email Recipients** pane and follow the instructions in Section 6.8, Select Recipients.

12. Click the Search button next to the **Facilities** field to display the **Location** dialog (Figure 4-16).

> **Note:** The facility name displayed in the **Facilities** field will be the site to which the user with security access to this function is logged on.

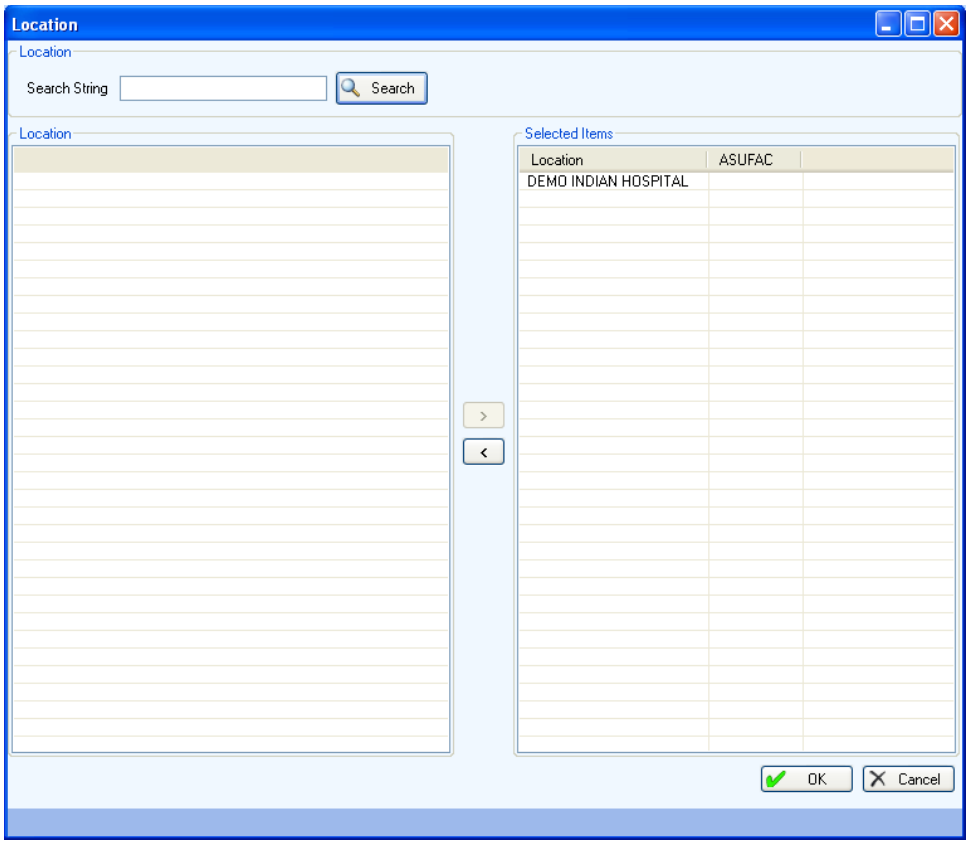


Figure 4-16: Visual CRS **Set up Area Automated Parameters** report **Location** dialog

13. To locate a specific facility, do one of the following:

- To display all the available locations in the **Location** list, leave the **Search String** field blank and click **Search**.

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

- Use the **Search String** field to filter the available location list.
  - To display all available locations whose name begins with a specific letter, type the letter in the **Search String** field and click **Search**.
  - To display all available locations whose names begin with a sequence of letters, type the letters at the beginning of the sequence in the **Search String** field and click **Search**.

Note:	Letters in the **Search String** field will be *included* in the filtered list.

14. Scroll through the **Location** list (Figure 4-17) to locate the location you want to use and click the location to highlight it.

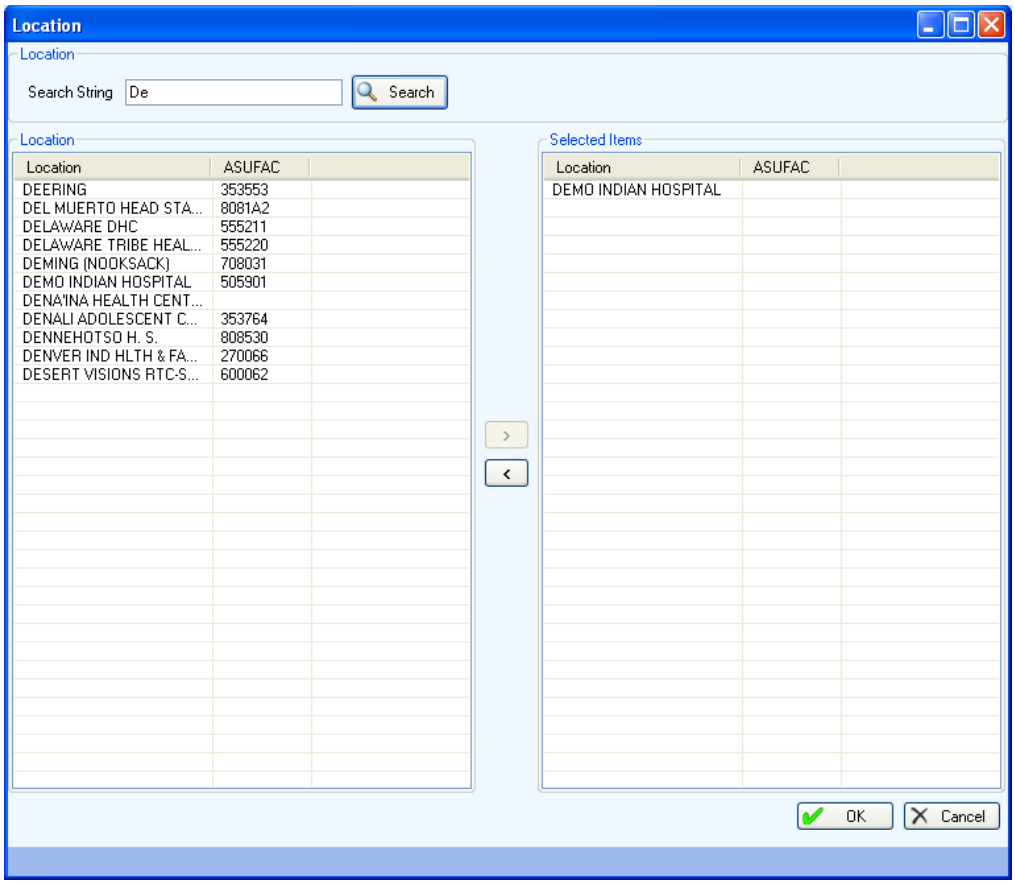


Figure 4-17: Visual CRS **Set up Area Automated Parameters** report filtered **Location** dialog

15. To add/remove locations for the report do one of the following:

- To add locations, scroll through the **Location** list to find the location or locations you want to add and do one of the following:
  - Double click the locations in the **Location** list to add the locations to the **Selected Items** list.
  - Highlight the recipient in the **Location** list and click the Right Arrow button to add the clinics to the **Selected Items** list.
  - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous locations and click the Right Arrow button to add the locations to the **Selected Items** list.
  - Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous locations and click the Right Arrow button to add the locations to the **Selected Items** list.
- To remove locations from the report, scroll through the **Selected Items** list to find the location or locations you want to remove and do one of the following:

- Double click the locations in the **Selected Items** list to remove the locations from the list.
- Highlight the location in the **Selected Items** list and click the Left Arrow button to remove the location from the list.
- Use the Shift-Up/Down Arrow keys to highlight multiple contiguous locations in the **Selected Items** list and click the Left Arrow button to remove the locations from the list.
- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous locations in the **Selected Items** list and click the Left Arrow button to remove the locations from the list.

16. When you have selected the locations for the report, click **OK** to save and close the **Location** dialog.

    To close the **Location** dialog without saving your selection, click **Cancel**.

17. To run the Area aggregate report now, select **Run Area Aggregate Now**

Note:	See Section 4.3.4 in the *CRS Version 17.1 User Manual* for additional information on the Area Aggregate of GPRA Extracts.

18. To schedule, delete, or unschedule the automated Area GPRA extract report, do one of the following:

    - If the Area does not have an automated Area GPRA extract report scheduled, select **Schedule the Auto Extract Task**
    - If the Area currently has an automated Area GPRA extract report scheduled, the report parameters will be automatically generated, do one of the following:
      - To make report parameter changes, repeat Steps 4 through 17.
      - To delete or unsubscribe to the automated Area GPRA extract, select **Delete/Unschedule the Auto Extract Task**

19. To save the report parameters, click **OK**.

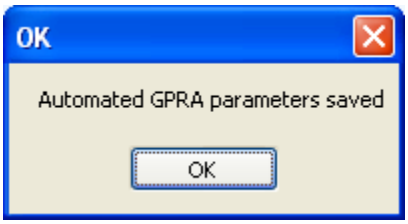


Figure 4-18: Visual CRS **Set up Area Automated Parameters** report **OK** dialog

20. Click **OK** on the **OK** dialog (Figure 4-18).

    - To cancel or reset the report parameters without saving, click **Clear**.

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 17.1 User Manual* for additional information on the uploading report files.
>
> See Section 5.1.2, About CRS File Names, for information about report file names and extensions.

5.1.1 List and Upload Report Files

1. On the **CRS** ribbon, select **List/Upload Report Files from Site** from the **Area Options** group.
2. Select the **List/Upload Report Files from Site** tab to display the **List/Upload Report Files from Site** pane (Figure 5-1).

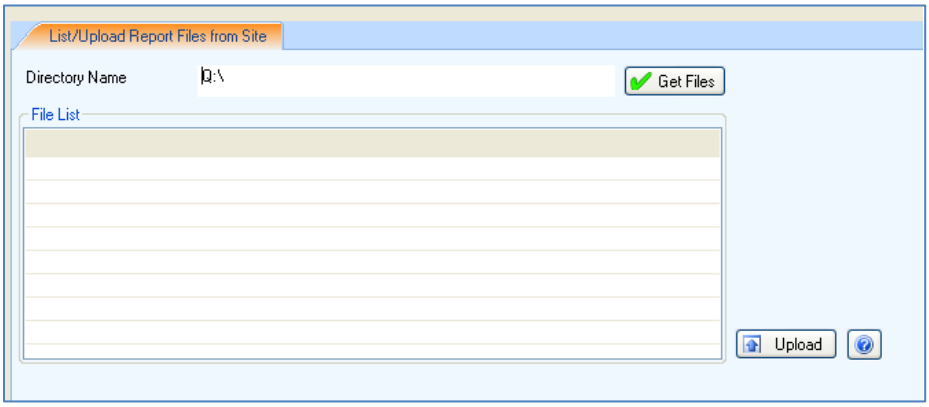


Figure 5-1: Visual CRS **List/Upload Report Files from Site** pane

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

> **Note:** Only FileMan data files created by CRS Version 17.1 will be listed in the File List pane.

5. Select the check box next to each file that you want to upload to CRS (Figure 5-2).

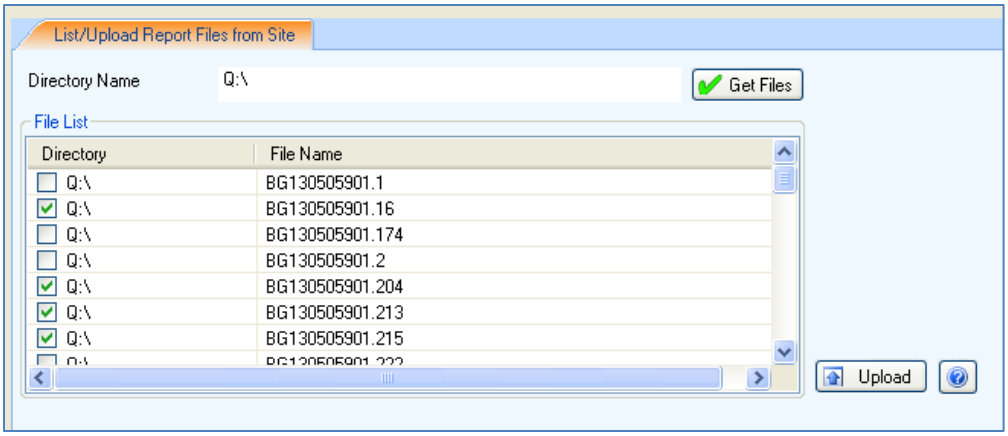


Figure 5-2: Visual CRS **Upload Files** pane with files checked to upload

6. To upload the selected files, click **Upload** next to the **File List** field. When files have been successfully uploaded, the **Success** dialog with the words **Checked files have been uploaded successfully** (Figure 5-3) will be displayed.

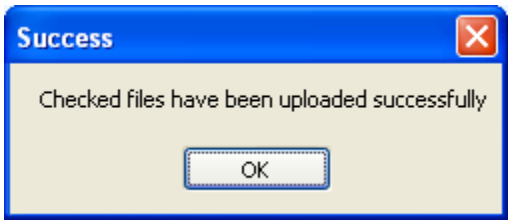


Figure 5-3: Visual CRS files upload **Success** dialog

7. Click **OK** to return to the **List/Upload Report Files from Site** pane.

5.1.2 About CRS File Names

When each facility runs the National GPRA/GPRAMA Report, the GPRA/GPRAMA Performance Report, the Other National Measures Report, the Elder Care Report, or the Patient Education with Community Specified report and exports these reports to the Area, the facility's CRS installation assigns a file name to the data file.

Each file name begins with "BG171" followed by the six-digit ASUFAC code for the facility that created and transmitted the file, and ends with one of the following extensions, where:

- **ONM** identifies Other National Measures Reports
- **EL** identifies Elder Care Reports
- **PED** identifies Patient Education with Community Specified Reports

GPRA/GPRAMA Performance Reports are treated the same way as National GPRA/GPRAMA Reports and will be displayed with them if they have a report period of July 1, 2016 through June 30, 2017, a baseline year of 2010, and a population of AI/AN only. These reports have only numbers in the file name extension (e.g., BG171505901.121).

5.2 Area National GPRA/GPRAMA Report

Use this option to produce an Area aggregate GPRA/GPRAMA report (includes GPRA Development Measures) aggregating all data received to date from the facilities in your Area.

> **Note:** See Section 6.2.1 in the *CRS Version 17.1 User Manual* for additional information on the Area National GPRA/GPRAMA Report.

To run the Area National GPRA/GPRAMA Report:

1. On the **CRS** ribbon, select **Area Reports** from the **Area Options** group.
2. Select the **Area National GPRA/GPRAMA Report-Includes GPRA Dev** tab to display the **Area National GPRA/GPRAMA Report** pane.

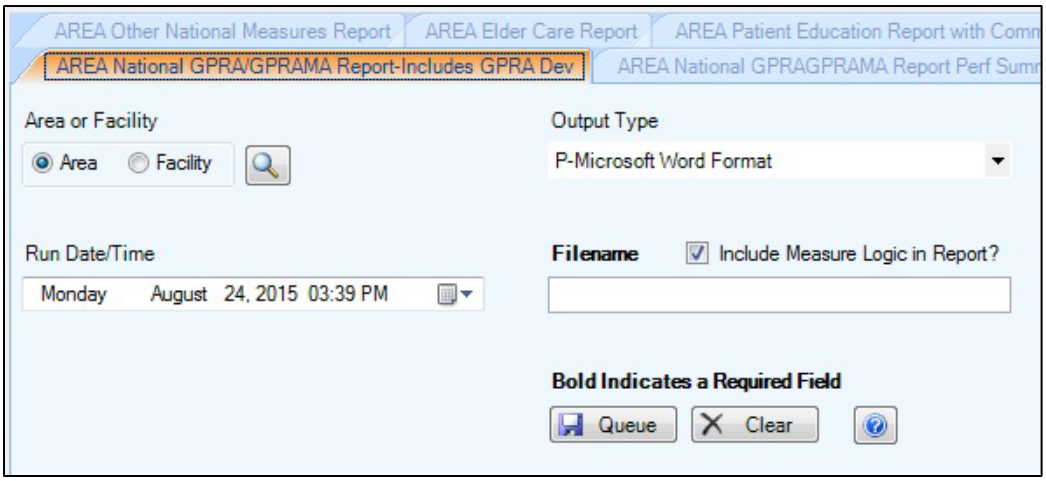


Figure 5-4: Visual CRS **Area National GPRA/GPRAMA Report-Includes GPRA Dev** pane

3. At the **Area or Facility** options, do one of the following:
   - To run a report that combines data from all sites within the Area, select **Area**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.

- To run a report on one or more specific facilities, select **Facility**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.

4. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

5. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

6. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

7. To view the report, follow the instructions in Section 6.14, View a Completed Report.

5.3 Area National GPRA/GPRAMA Report Performance Summaries

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

> **Note:** See Section 6.2.2 in the *CRS Version 17.1 User Manual* for additional information on the Area National GPRA/GPRAMA Report Performance Summaries.

To Run the Area National GPRA/GPRAMA Report Performance Summaries

1. On the **CRS** ribbon, select **Area Reports** from the **Area Options** group.

2. Select the **Area National GPRA/GPRAMA Report Perf Summaries** tab to display the **Area National GPRA/GPRAMA Report Perf Summaries** pane.

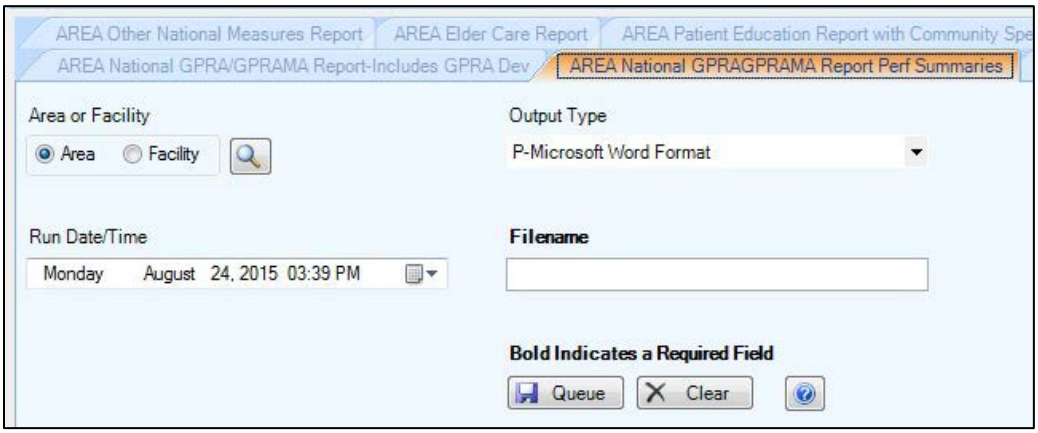


Figure 5-5: Visual CRS **Area National GPRA/GPRAMA Report Perf Summaries** pane

3. At the **Area or Facility** options, do one of the following:
   - To run a report that combines data from all sites within the Area, select **Area**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.
   - To run a report on one or more specific facilities select **Facility**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.
4. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
5. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.
6. To view the report, follow the instructions in Section 6.14, View a Completed Report.

5.4 Area GPRA/GPRAMA Performance Report

Use this option to produce an Area aggregate GPRA/GPRAMA 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/GPRAMA Report, but with user-defined report parameters (report dates, patient population, and community taxonomy).

> **Note:** See Section 6.2.3 in the *CRS Version 17.1 User Manual* for additional information on the Area GPRA/GPRAMA Performance Report.

To Run the Area GPRA/GPRAMA Performance Report:

1. On the **CRS** ribbon, select **Area Reports** from the **Area Options** group.
2. Select the **Area National GPRA/GPRAMA Performance Report** tab to display the **Area National GPRA/GPRAMA Performance Report** pane.

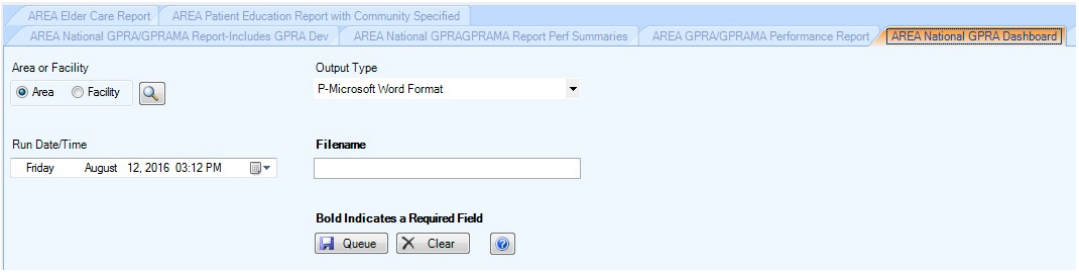


Figure 5-6: Visual CRS **Area GPRA/GPRAMA Performance Report** pane

3. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

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

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

5. To select the facilities to include in the report, click **Select Facilities** to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility,

6. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

7. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

9. To view the report, follow the instructions in Section 6.14, View a Completed Report.

5.5 Area National GPRA Dashboard

Use this option to produce an Area-Office-wide National GPRA Dashboard Report. This report aggregates all data files received to date from facilities and produces a dashboard for the Area, as well as dashboards for each facility in that Area.

> **Note**: See Section 6.2.4 in the *CRS Version 17.1 User Manual* for additional information on the Area National GPRA Dashboard.

To run the Area National GPRA Dashboard:

1. On the **CRS** ribbon, select **Area Reports** from the **Area Options** group.

2. Select the **Area National GPRA Dashboard** tab to display the **Area National GPRA Dashboard Report** pane.

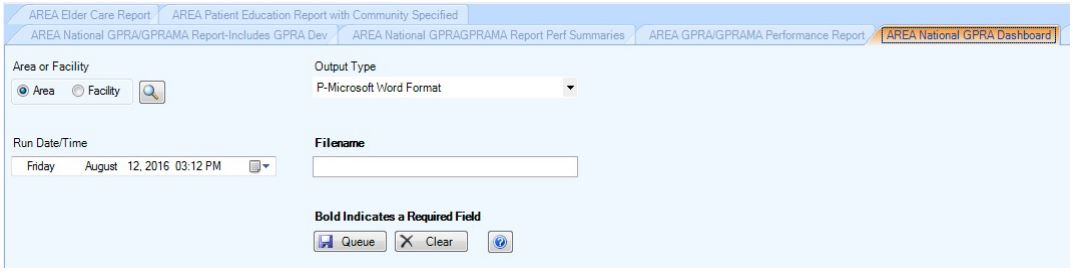


Figure 5-7: Visual CRS **Area National GPRA Dashboard** pane

3. At the **Area or Facility** options, do one of the following:

   - To run a report that combines data from all sites within the Area, select **Area**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.
   - To run a report on one or more specific facilities select **Facility**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.

4. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

5. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

6. To view the report, follow the instructions in Section 6.14, View a Completed Report.

5.6 Area Other National Measures Report

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

The Area Other National Measures Report can be run in two ways:

- Using the same hard-coded report parameters (Report Period, Previous Year Period, and Baseline Year) as the National GPRA/GPRAMA Report.
- Using custom, user-defined report parameters.

Note:	See Section 6.2.5 in the *CRS Version 17.1 User Manual* for additional information on the Area Other National Measures Report.

To run the Area Other National Measures Report

1. On the **CRS** ribbon, select **Area Reports** from the **Area Options** group.
2. Select the **Area Other National Measures Report** tab to display the **Area Other National Measures Report** pane.

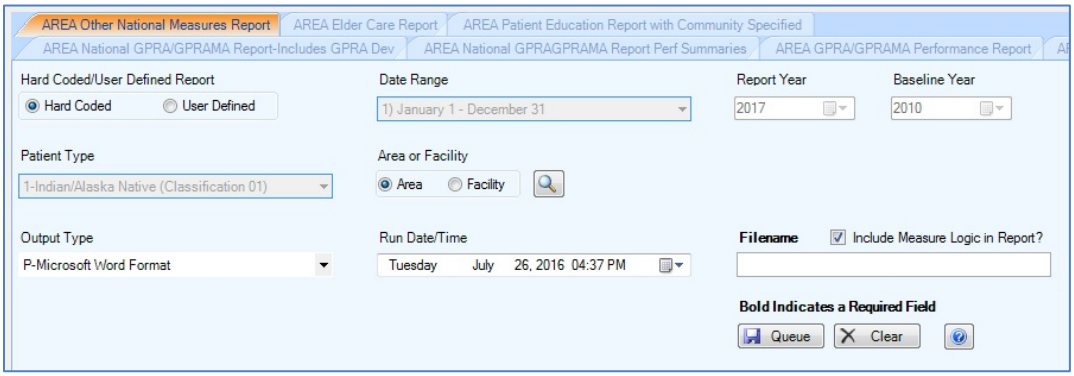


Figure 5-8: Visual CRS **Area Other National Measures Report** pane

3. At the **Hard-coded/User-defined Report** options, do one of the following:
   - To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in Section 5.6.1, Area Other National Measures Report: Hard-Coded Option.
   - To run the report using custom, user-defined parameters, select **User-defined** and follow the instructions in Section 5.6.2, Area Other National Measures Report: User-Defined Option.
4. To view the report, follow the instructions in Section 6.14, View a Completed Report.

5.6.1 Area Other National Measures Report: Hard-Coded Option

Use this option to produce an aggregate Area Other National Measures Report for the 2017 GPRA year using the performance measure definitions from CRS Version 17.1. The following parameters are predefined for this report:

- A report period of July 1, 2016 through June 30, 2017
- A baseline year of July 1, 2009 through June 30, 2010
- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

To run the Area Other National Measures Report with hard-coded parameters:

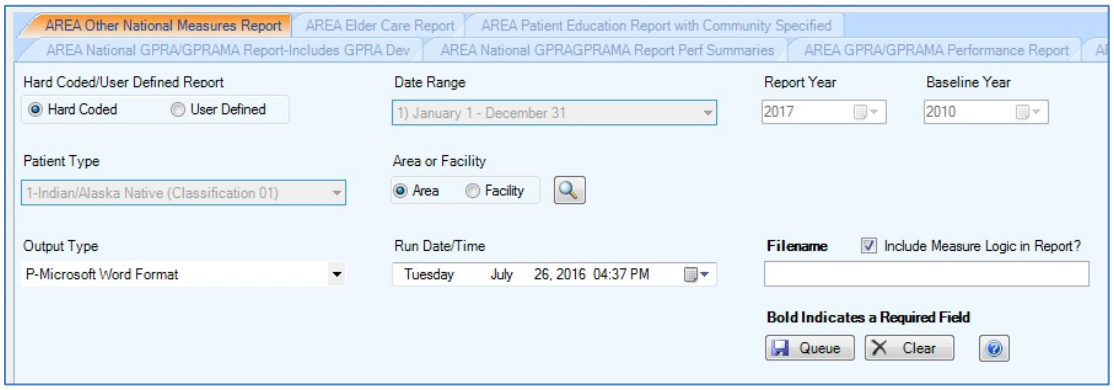


Figure 5-9: Visual CRS **Area Other National Measures Report** pane (**Hard-coded Report** option)

1. At the **Hard-coded/User-defined Report** options, select **Hard-coded**.
2. At the **Area or Facility** options, do one of the following:
   - To run a report that combines data from all sites within the Area, select **Area**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.
   - To run a report on one or more specific facilities select **Facility**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.
3. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
4. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.
5. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.
6. To view the report, follow the instructions in Section 6.14, View a Completed Report.

5.6.2 Area Other National Measures Report: User-Defined Option

To run the Area Other National Measures Report with user-defined parameters:

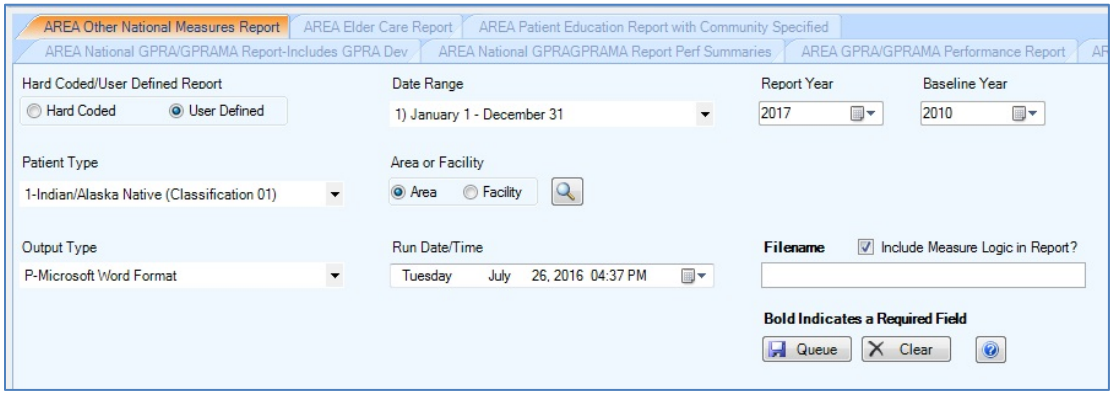


Figure 5-10: Visual CRS **Area Other National Measures Report** pane (**User-defined Report** option)

1. At the **Hard-coded/User-defined Report** options, select **User-defined**.
2. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.
3. From the **Patient Type** list, select one of the following beneficiary populations on which to report:
   - **1 - Indian/Alaska Native (Classification 01)**
   - **2 - Not Indian Alaskan/Native (Not Classification 01)**
   - **3 - All (Both Indian/Alaska Natives and Non-01)**
4. At the **Area or Facility** options, do one of the following:
   - To run a report that combines data from all sites within the Area, select **Area**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.
   - To run a report on one or more specific facilities select **Facility**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.
5. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.
6. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.
7. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

To cancel or reset the report parameters without queuing the report, click **Clear**.

8. To view the report, follow the instructions in Section 6.14, View a Completed 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 17.1 User Manual* for additional information on the Area Elder Care Report.

To run the Area Elder Care Report:

1. On the **CRS** ribbon, select **Area Reports** from the **Area Options** group.
2. Select the **Area Elder Care Report** tab to display the **Area Elder Care Report** pane.

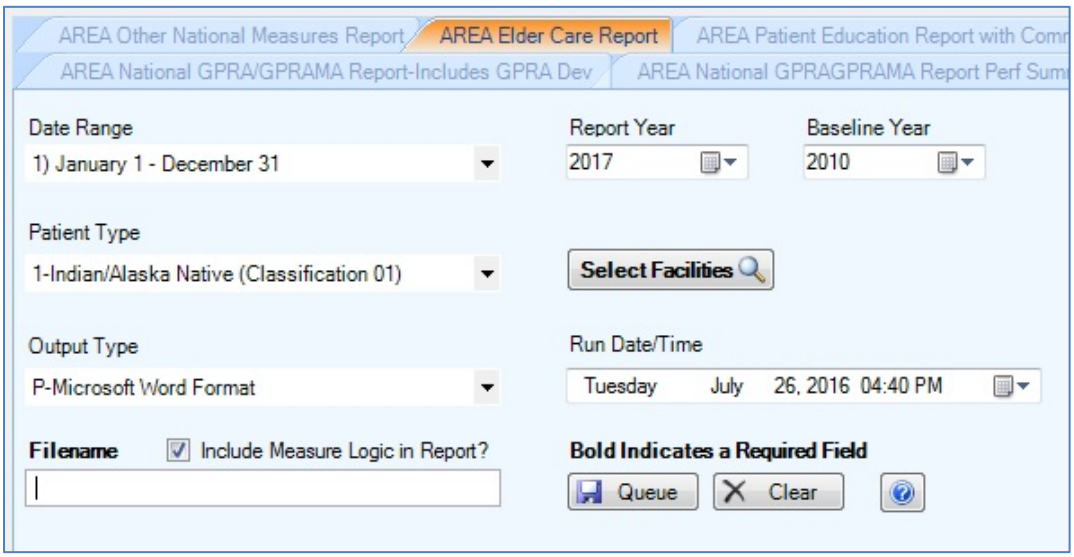


Figure 5-11: Visual CRS **Area Elder Care Report** pane

3. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.
4. From the **Patient Type** list, select one of the following beneficiary populations on which to report:
   - **1 - Indian/Alaska Native (Classification 01)**
   - **2 - Not Indian Alaskan/Native (Not Classification 01)**
   - **3 - All (Both Indian/Alaska Natives and Non-01)**

5. To select the facilities to include in the report, click **Select Facilities** to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.

6. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

7. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

9. To view the report, follow the instructions in Section 6.14, View a Completed Report.

5.8 Area Patient Education Report with 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 6.2.7 in the *CRS Version 17.1 User Manual* for additional information on the Area Patient Education Report with Community Specified.

To run the Area Patient Education Report with Community Specified:

1. On the **CRS** ribbon, select **Area Reports** from the **Area Options** group.

2. Select the **Area Patient Education Report with Community Specified** tab to display the **Area Patient Education Report with Community Specified** pane.

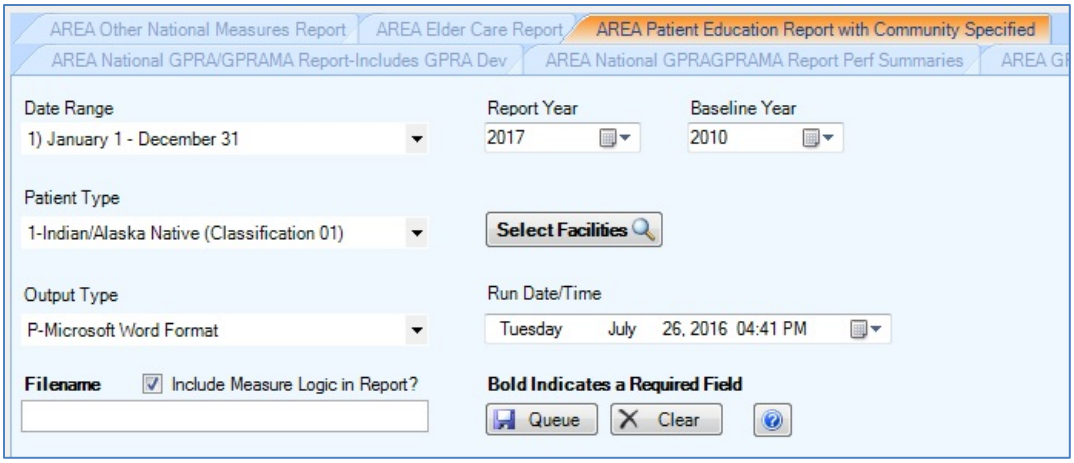


Figure 5-12: Visual CRS **Area Patient Education Report with Community Specified** pane

3. To set the **Date Range, Report Year**, and **Baseline Year** options, follow the instructions in Section 6.12, Select Report Dates.

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

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

5. To select the facilities to include in the report, click **Select Facilities** to display the **Facilities** pane and follow the instructions in Section 6.7, Select a Facility.

6. To select the report output type and change the time and date for the report to run, follow the instructions in Section 6.13, Select Report Output Options.

7. To run the report without the logic text included in the report, uncheck the **Include Measure Logic in Report** checkbox.

8. To queue the report to run at the time specified at **Run Date/Time**, enter a file name in the **Filename** field and click **Queue**.

   To cancel or reset the report parameters without queuing the report, click **Clear**.

9. To view the report, follow the instructions in Section 6.14, View a Completed Report.

6.0 Basic Operations in Visual CRS

This section provides instructions for the basic operations in Visual CRS, instructions for using each of the supplemental panes opened by Visual CRS in the process of selecting report options, such as the **Taxonomy** dialog and the **Search Template** dialog, and for specifying report dates and report output options.

6.1 Create or Select a Demo/Test Patient Search Template

CRS uses the RPMS Demo/Test Patient Search Template (**DPST** option located in the PCC Management Reports, Other PCC Management Reports/Options menu).

> **Note:** Requires the APCLZ UPDATE DEMO TEMPLATE key to access this menu.
>
> See Section 4.8 in the *CRS Version 17.1 User Manual* for additional information on the updating the RPMS Demo/Test Patient Search Template.

If the RPMS Demo/Test Patient Search Template does not contain any patients the Demo Patients dialog (Figure 6-1) will display once when accessing the reports for the first time.

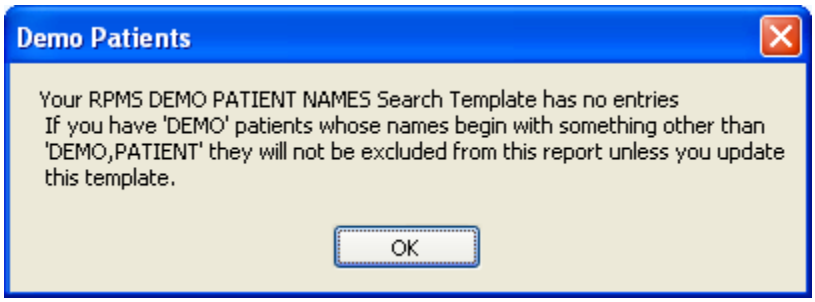


Figure 6-1: Visual CRS **Demo Patients** dialog

Click **OK** to continue with the report.

> **Note:** This message can be eliminated by adding one or more patients to your RPMS Demo/Test Patient Search Template.

6.2 Select a Taxonomy

Many CRS reports allow you to select either a community taxonomy or provider taxonomy:

- A community taxonomy defines the range of communities where a facility's patients reside and identifies the population that is the subject of the report. Use **Site Parameters** (Section 4.2, Site Parameters) to specify the default community taxonomy that your site is most likely to use.
- A provider taxonomy contains a list of designated providers that can be used to run reports for multiple providers at one time.

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 17.1 User Manual* for more information about community taxonomies and using Q-Man to define them.

6.2.1 Select a Community Taxonomy

The community taxonomy that will be used for a report is displayed in the **Community Taxonomy** field in the report pane.

1. To select a different community taxonomy for the report, click the Search button next to the **Community Taxonomy** field to display the **Taxonomy** dialog with a list of the available taxonomies.

> **Note:** A report can be run using only one taxonomy at a time.

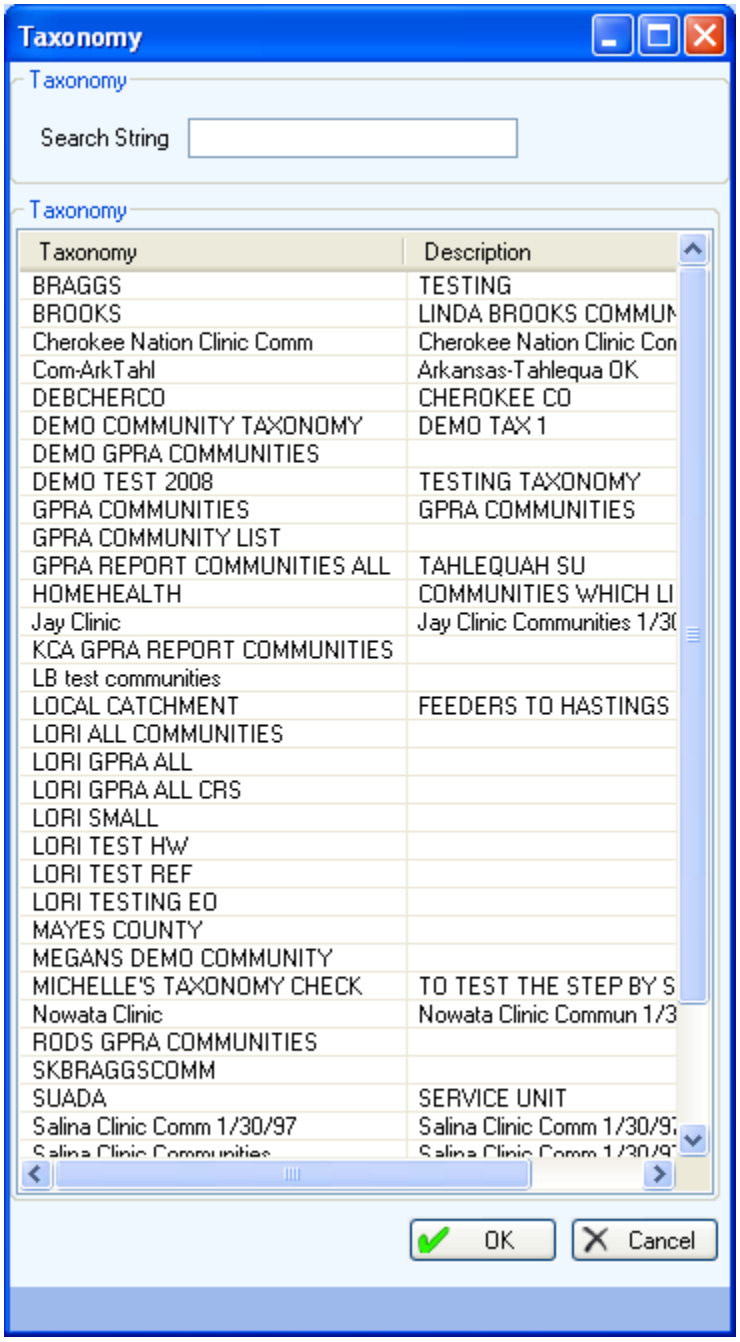


Figure 6-2: Visual CRS **Taxonomy** dialog

2. To select a taxonomy to use for the report, do one of the following:

   - Scroll through the **Taxonomies** list to find the taxonomy you want to use and click the taxonomy to highlight it.
   - If you know the name of the taxonomy you want to use, begin typing the taxonomy name from the beginning in the **Search String** field, find the taxonomy you want to use, and click the taxonomy to highlight it.

> **Note:** After the taxonomy has been highlighted, taxonomy name will be displayed in the **Search String** field.

3. When you have selected the correct community taxonomy for the report, click **OK** to save and close the **Taxonomy** dialog.

   To close the **Taxonomy** dialog without saving your selection, click **Cancel**.

6.2.2 Select a Provider Taxonomy

To select a provider taxonomy for the report:

1. Select the **Taxonomy** Checkbox.
2. Click the Search button next to the **Designated Provider(s)** field. The **Taxonomy** dialog opens and displays a list of the available taxonomies.

> **Note:** A report can be run using only one taxonomy at a time.

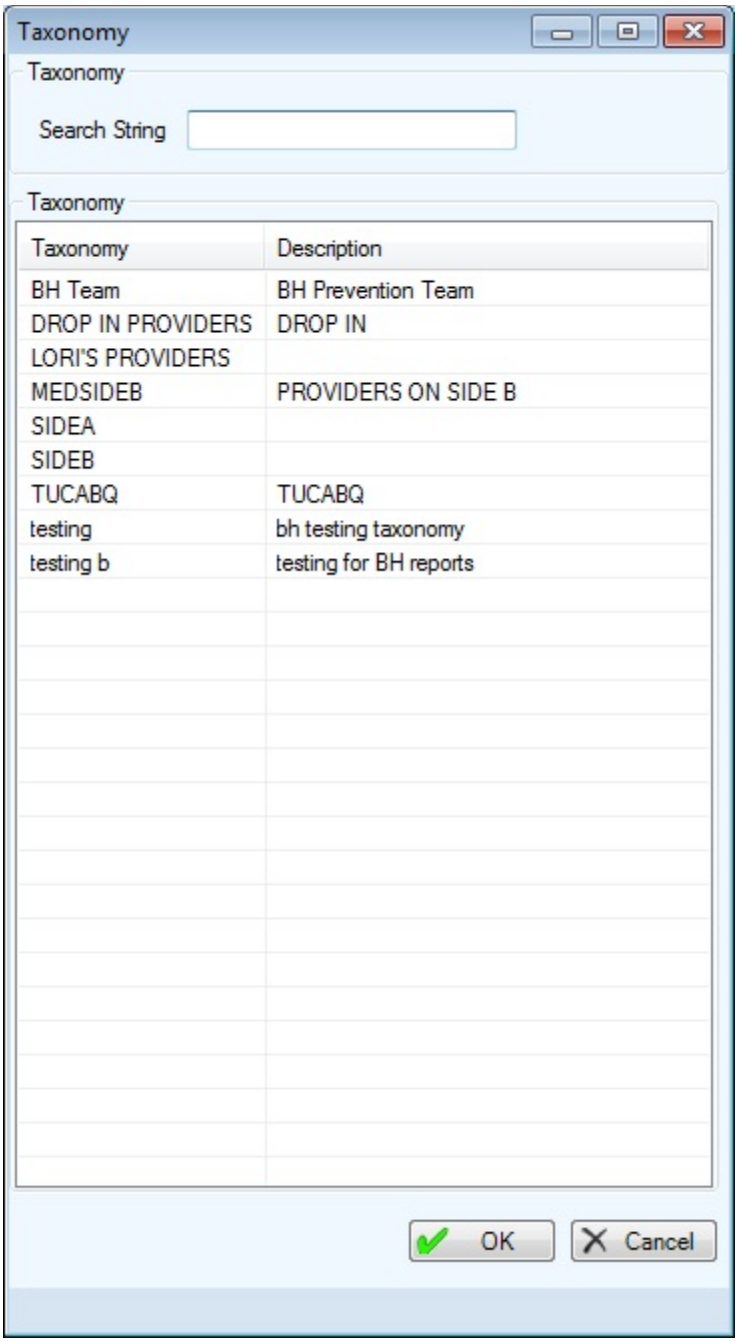


Figure 6-3: Visual CRS **Taxonomy** dialog

3. To select a taxonomy to use for the report, do one of the following:

   - Scroll through the **Taxonomies** list to find the taxonomy you want to use and click the taxonomy to highlight it.
   - If you know the name of the taxonomy you want to use, begin typing the taxonomy name from the beginning in the **Search String** field, find the taxonomy you want to use, and click the taxonomy to highlight it.

> **Note:** After the taxonomy has been highlighted, taxonomy name will be displayed in the **Search String** field.

4. When you have selected the correct community taxonomy for the report, click **OK** to save and close the **Taxonomy** dialog.

   To close the **Taxonomy** dialog without saving your selection, click **Cancel**.

6.3 Select a Community

For some reports, the report can be run on a single community. To do this, check the **Run Report for One Community?** checkbox. The **Community** dialog will then appear.

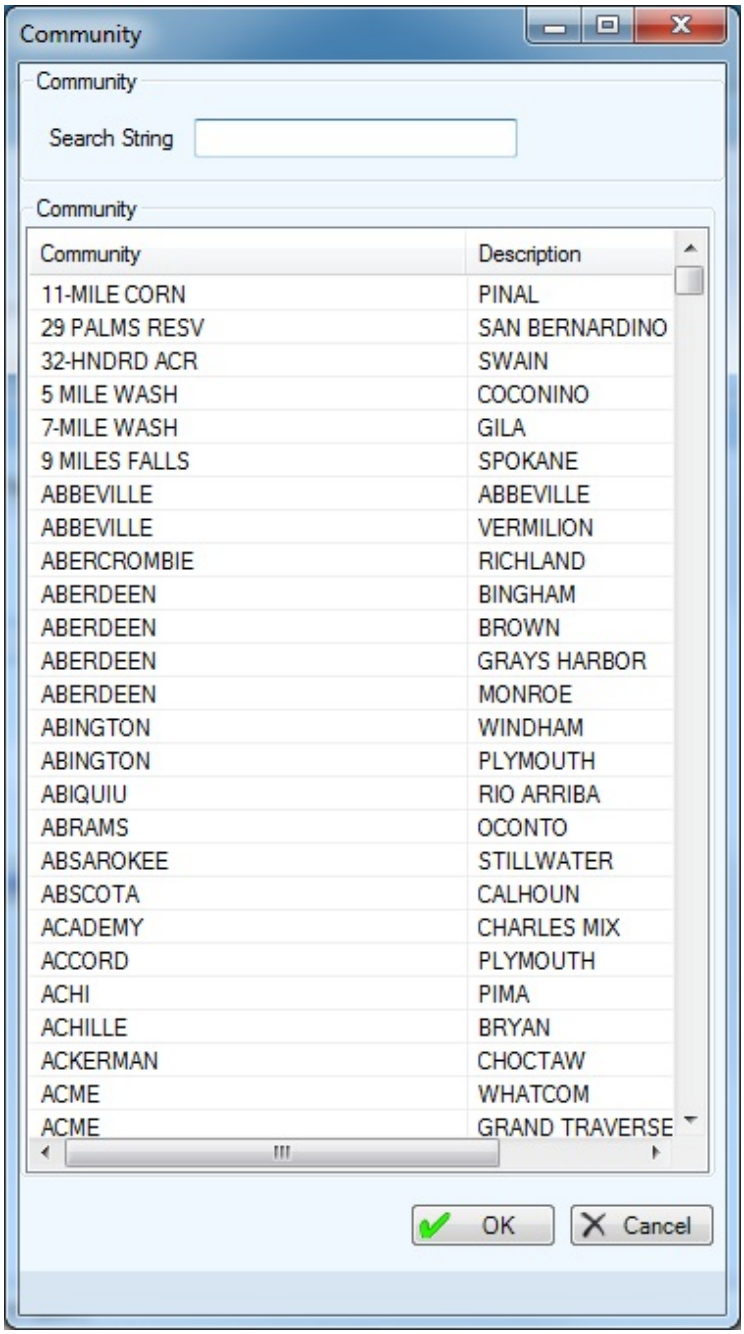


Figure 6-4: Visual CRS **Community** dialog

1. To select a community to use for the report, do one of the following:

- Scroll through the **Community** list to find the community you want to use and click the community to highlight it.
- If you know the name of the community you want to use, begin typing the community name from the beginning in the **Search String** field, find the community you want to use, and click the community to highlight it.

> **Note:** After the community has been highlighted, community name will be displayed in the **Search String** field.

2. When you have selected the correct community for the report, click **OK** to save and close the **Community** dialog.

   To close the **Community** dialog without saving your selection, click **Cancel**.

6.4 Select 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.

To select a location for the report:

1. Click the Search button next to the **Location** field to display the **Edit Site Parameters** message:

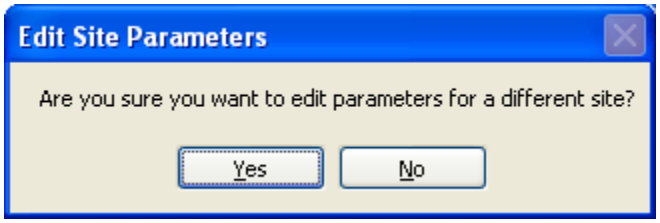


Figure 6-5: Visual CRS **Edit Site Parameters** message

2. Click **Yes** (edit site parameters for a different location) to display the **Location** dialog.

> **Note:** Only one location can be selected as the site's Home location. The sites listed in the **Location** dialog are not limited to sites within your multi-divisional database. Be sure to select a in your database as the site's Home location.

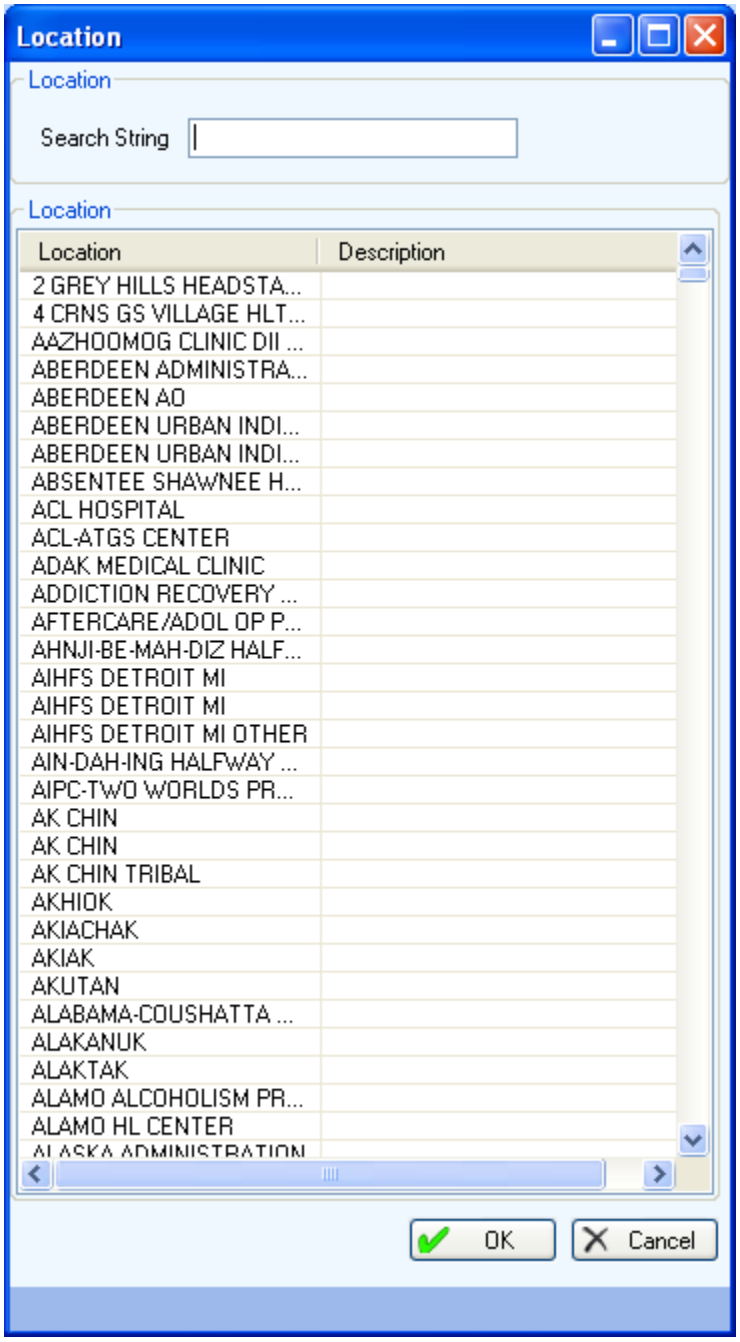


Figure 6-6: Visual CRS **Location** dialog

3. To select a location as your site's Home location, do one of the following:

   - Scroll through the **Location** list to find the location you want to use and click the location to highlight it.
   - If you know the name of the location you want to use, begin typing the location name from the beginning in the **Search String** field, find the location you want to use, and click the taxonomy to highlight it.

> **Note:** After the location has been highlighted, location name will be displayed in the **Search String** field.

4. Click **OK** to save and close the **Location** dialog. To close the **Location** dialog without saving your selection, click **Cancel**.

6.5 Select Clinics

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

- If no clinics have been selected for a report, the **Clinic** field in the report pane is empty.
- If one clinic has been selected, the name of the selected clinic is displayed in the **Clinic** field.
- If more than one clinic has been selected, the words **Multiple Clinics** are displayed in the **Clinic** field.

To select one or more clinics for the report:

1. Click the Search button next to the **Clinic** field to display the **Clinic** dialog.

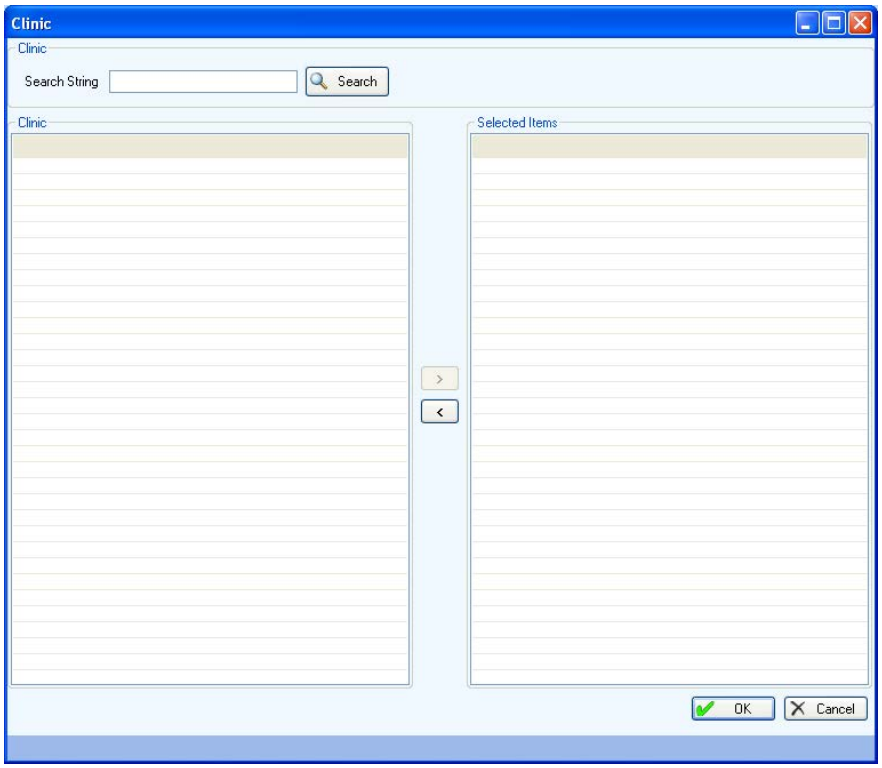


Figure 6-7: Visual CRS **Clinic** dialog

1. To locate a specific clinic, do one of the following:

- To display all the clinics in the **Clinic** list, leave the **Search String** field blank and click **Search**.

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

- Use the **Search String** field to filter the clinic list.
  - To display all clinics beginning with a specific letter, type the letter in the **Search String** field and click **Search**.
  - To display all clinics whose names begin with a sequence of letters, type the letters *at the beginning of the sequence* in the **Search String** field and click **Search**.

Note:	Letters in the **Search String** field will be *included* in the filtered list.

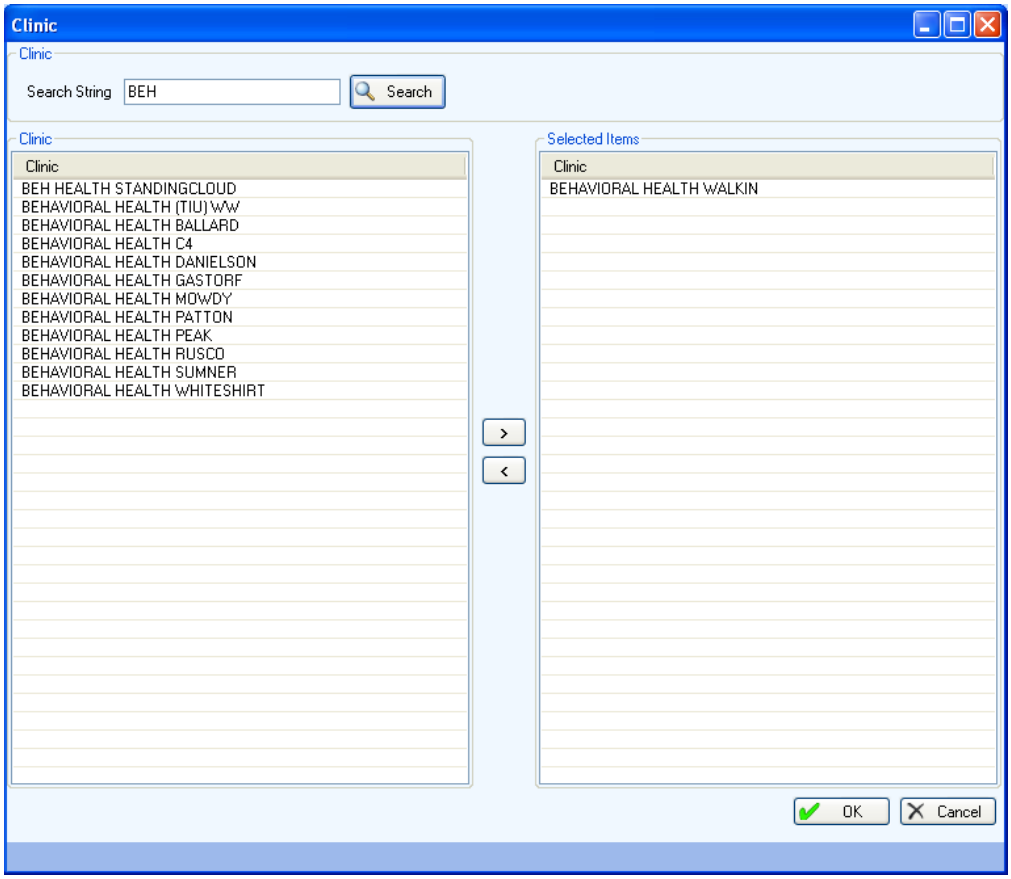


Figure 6-8: Visual CRS **Search String** field in the Clinic dialog

2. To add clinics for the report, scroll through the **Clinic** list to find the clinic or clinics you want to use and do one of the following:

   - Double click the clinics in the **Clinic** list to add the clinics to the **Selected Items** list.

- Highlight the clinic in the **Clinic** list and click the Right Arrow button to add the clinics to the **Selected Items** list.
- Use the Shift-Up/Down Arrow keys to highlight multiple contiguous clinics and click the Right Arrow button to add the clinics to the **Selected Items** list.
- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous clinics and click the Right Arrow button to add the clinics to the **Selected Items** list.

3. To remove clinics from the report, scroll through the **Selected Items** list to find the clinic or clinics you want to use and do one of the following:

- Double click the clinic in the **Selected Items** list to remove the clinic from the list.
- Highlight the clinic in the **Selected Items** list and click the Left Arrow button to remove the clinic from the list.
- Use the Shift-Up/Down Arrow keys to highlight multiple contiguous clinics in the **Selected Items** list and click the Left Arrow button to remove the clinics from the list.
- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous clinics in the **Selected Items** list and click the Left Arrow button to remove the clinics from the list.

4. When you have selected the clinics for the report, click **OK** to save and close the **Clinic** dialog.

- To close the **Clinic** dialog without saving your selection, click **Cancel**.

6.6 Select Providers

Some CRS reports allow you to specify a provider whose patients will be included in the report or allow you to run the report for specified multiple providers.

6.6.1 Select One Provider

If no provider has been selected for a report, the **Provider** field in the report pane is empty. If a provider has been selected, the name is displayed in the **Provider** field.

1. To select a provider for the report, click the Search button next to the **Provider** field to display the **Provider** dialog (Figure 6-9).

Note: A report can be run for only one provider at a time.

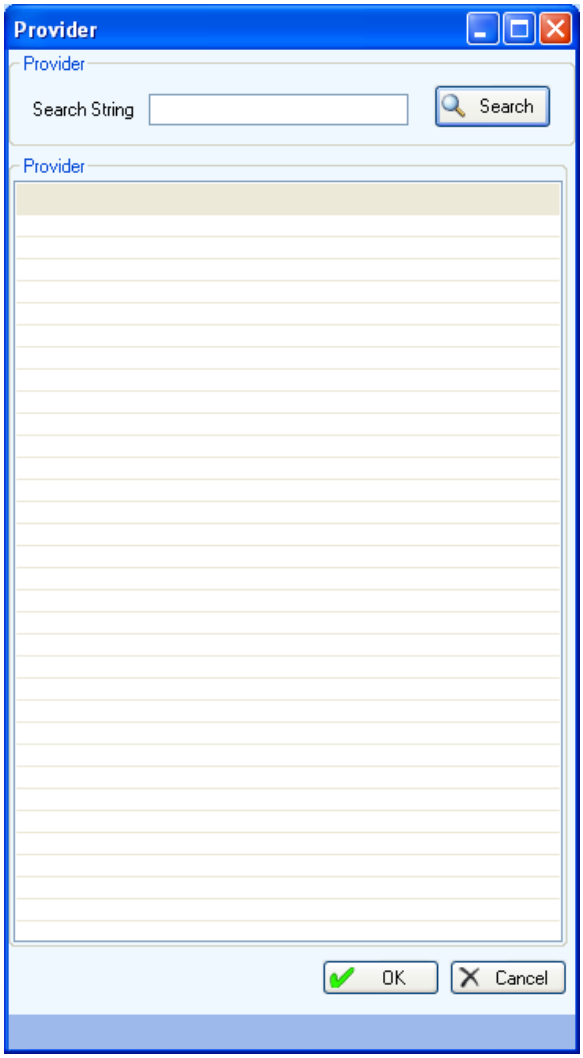


Figure 6-9: Visual CRS **Provider** dialog

2. To locate a specific provider, do one of the following:

   - To display all the providers in the **Provider** list, leave the **Search String** field blank and click **Search**.

Note:	The entire list of providers may be very long. Providers are displayed as Last Name,First Name (e.g., DEMO,DOCTOR).

   - Use the **Search String** field to filter the provider list.
     - To display all providers whose last name begins with a specific letter, type the letter in the **Search String** field and click **Search**.
     - To display all providers whose last names begin with a sequence of letters, type the letters at the beginning of the sequence in the **Search String** field and click **Search**.

> **Note:** Letters in the **Search String** field will be *included* in the filtered list.

3. Scroll through the **Provider** list to locate the provider you want to use and click the provider to highlight it.

> **Note:** After the provider has been highlighted, the provider name will be displayed in the **Search String** field.

4. When you have selected the correct provider for the report, click **OK** to save and close the **Provider** dialog.

   To close the **Provider** dialog without saving your selection, click **Cancel**.

6.6.2 Select Multiple Providers

If no providers have been selected for a report, the **Designated Provider(s)** field in the report pane is empty. If providers have been selected, the **Provider** field will display "Provider(s) Selected" or the name of the provider taxonomy.

1. To select providers for the report, click the Search button next to the **Designated Provider(s)** field to display the **Provider** dialog.

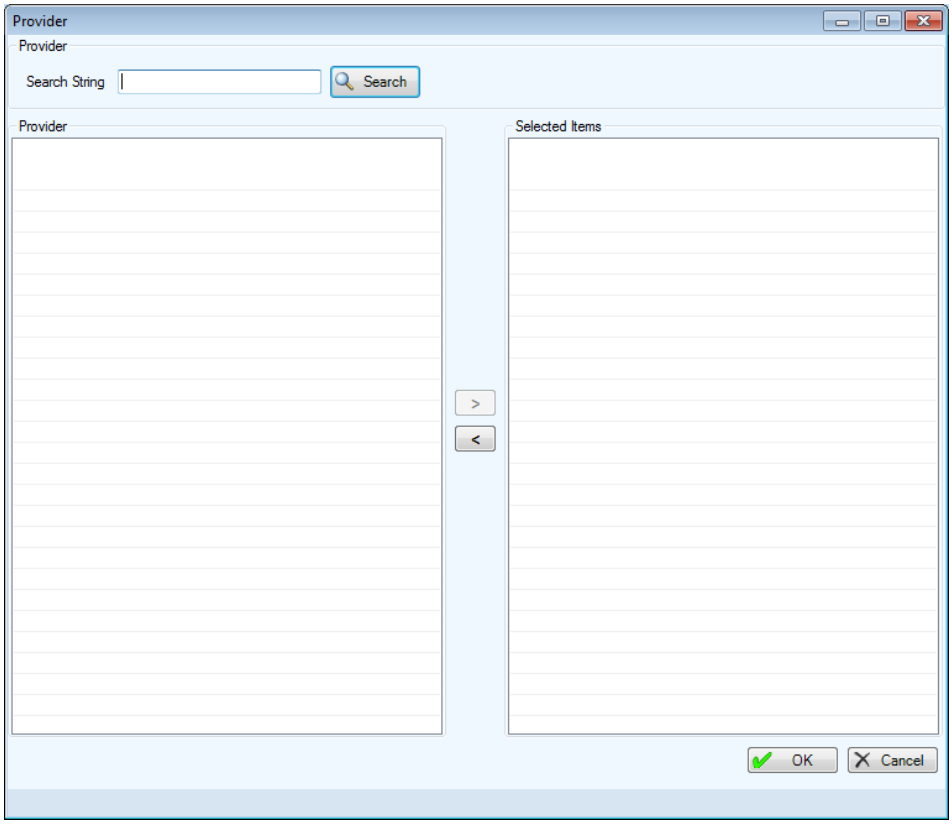


Figure 6-10: Visual CRS **Provider** dialog

2. To locate a specific provider, do one of the following:

   - To display all the providers in the **Provider** list, leave the **Search String** field blank and click **Search**.

Note:	The entire list of providers may be very long. Providers are displayed as Last Name,First Name.

   - Use the **Search String** field to filter the provider list. To display all providers whose last name begins with a specific letter or letter sequence, type the letter or letter sequence in the **Search String** field and click **Search**.

Note:	Letters in the **Search String** field will be *included* in the filtered list.

3. Scroll through the **Provider** list to locate the provider you want to use and click the provider to highlight it.

4. At the **Provider** list, do one of the following to add providers to the **Selected Items** list:

   - Double click the provider name in the **Provider** list to add the provider to the **Selected Items** list.
   - Highlight the provider and click the Right Arrow button add the provider to the **Selected Items** list.
   - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous providers and click the Right Arrow button to add the providers to the **Selected Items** list.
   - Press and hold the Ctrl key, click the mouse to highlight multiple contiguous or non-contiguous providers, and click the Right Arrow button to add the providers to the **Selected Items** list.

5. To remove providers from the **Selected Items** list do one of the following:

   - Double click the provider in the **Selected Items** list to remove the provider from the list.
   - Highlight the provider in the **Selected Items** list and click the Left Arrow button to remove the provider from the list.
   - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous providers in the **Selected Items** list and click the Left Arrow button to remove the providers from the list.
   - Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous providers in the **Selected Items** list and click the Left Arrow button to remove the providers from the list.

6. When you have selected the correct providers for the report, click **OK** to save and close the **Provider** dialog.

   To close the **Provider** dialog without saving your selection, click **Cancel**.

6.6.3 Select a Provider Taxonomy

To select providers for the report, follow the instructions in Section 6.2.2, Select a Provider Taxonomy.

6.7 Select a Facility

CRS Area reports allow you to specify facilities to be included in the report. To select a facility:

1. At the **Area or Facility** options, do one of the following:

   - To run a report that combines data from all sites within the Area:
     - Select **Area**.
     - Click the Search button next to the **Area or Facility** option to display the **Facilities** dialog (Figure 6-11).
     - Click the Double Right Arrow button to add all sites to the **Items Selected** list.
     - Click **OK** to save and close the **Facilities** dialog, or click **Cancel** to close the dialog without saving your selection.

Note:	The facilities that have uploaded their data files to the Area for the selected time period are displayed.

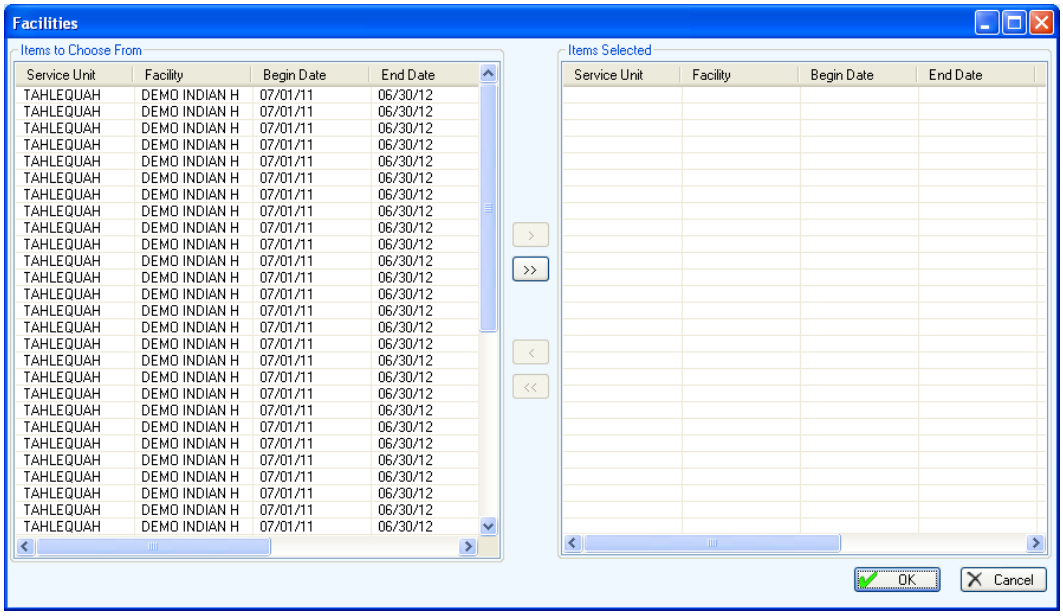


Figure 6-11: Visual CRS **Area Facilities** dialog

- To run a report on one or more specific facilities select **Facility**, and then click the Search button next to the **Area or Facility** option to display the **Facilities** dialog.

  At the **Items to Choose From** list, do one of the following to add facilities to the **Items Selected** list:

  – Double click the facility in the **Items to Choose From** list to add the site to the **Items Selected** list.
  – Highlight the facility and click the Right Arrow button to add the site to the **Items Selected** list.
  – Use the Shift-Up/Down Arrow keys to highlight multiple contiguous facilities and click the Right Arrow button to add the sites to the **Items Selected** list.
  – Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous facilities and click the Right Arrow button to add the sites to the **Items Selected** list.
  – Click the Double Right Arrow button to add all sites to the **Items Selected** list.

  To remove sites from the **Items Selected** list do one of the following:

  – Double click the facility in the **Items Selected** list to remove the site from the list.
  – Highlight the facility in the **Items Selected** list and click the Left Arrow button to remove the site from the list.

– Use the Shift-Up/Down Arrow keys to highlight multiple contiguous facilities in the **Items Selected** list and click the Left Arrow button to remove the sites from the list.
– Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous facilities in the **Items Selected** list and click the Left Arrow button to remove the sites from the list.
– Click the Double Left Arrow button to remove all the sites in the **Items Selected**.

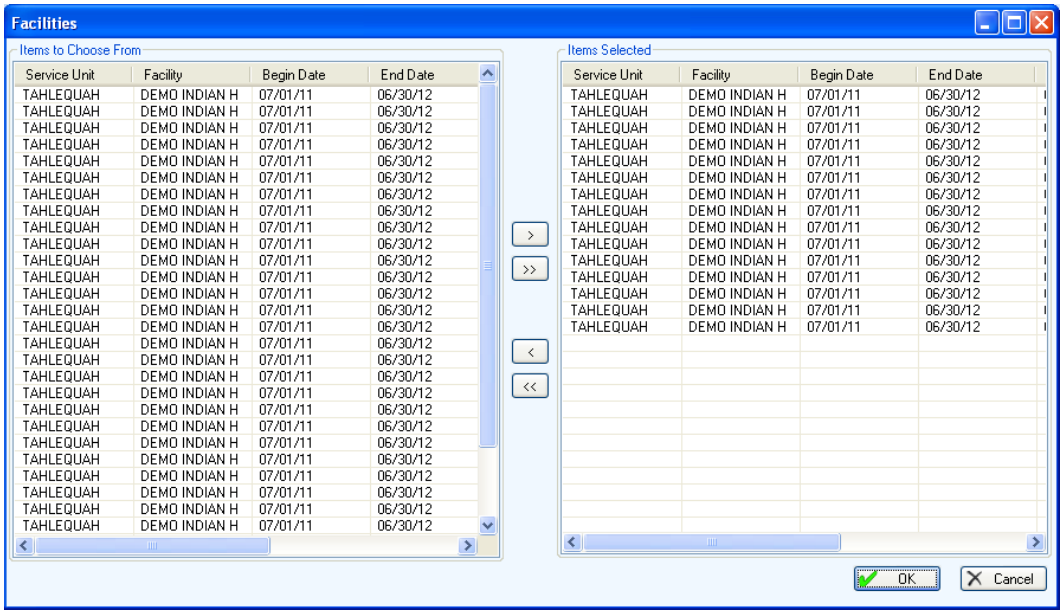


Figure 6-12: Visual CRS **Facility Facilities** dialog with selected facilities

2. After adding/removing facilities in the, **Items Selected** list, click **OK** to save and close the **Facilities** dialog, or click **Cancel** to close the dialog without saving your selection.

6.8 Select Recipients

The CRS Area automated reports allow you to specify recipients to receive alerts or mailman message if a report fails.

If no recipients have been selected for a report, the **Email Recipients** field in the report pane is empty. If one recipient has been selected, the name of the selected recipient is displayed in the **Email Recipients** field. If more than one recipient has been selected, multiple recipients are displayed in the **Email Recipients** field. To see a complete list of recipients, click the Search button next to the **Email Recipients** field to display the **Email Recipients** dialog. All selected recipients will be displayed in the **Selected Items** list.

1. On the **CRS** ribbon, select **Report Automation** from the **Reports** group.

2. Select the **Set up Area Automated Parameters** tab to display the **Set up Area Automated Parameters** pane (Figure 6-13).

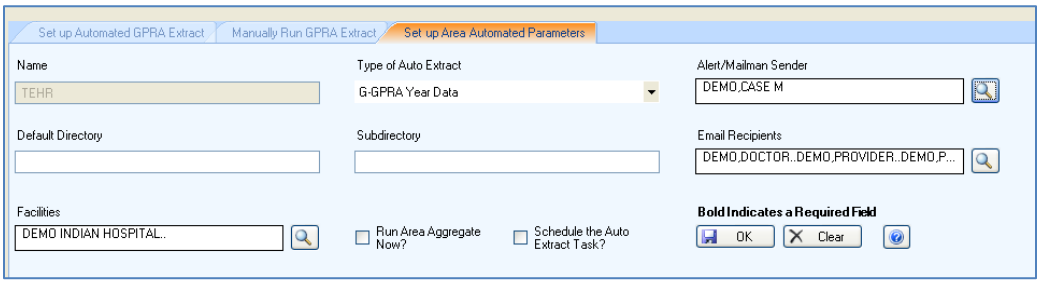


Figure 6-13: Visual CRS **Set up Area Automated Parameters** pane

3. At the **Email Recipients** field, click the Search button next to the **Email Recipients** field to display the **Email Recipients** dialog.

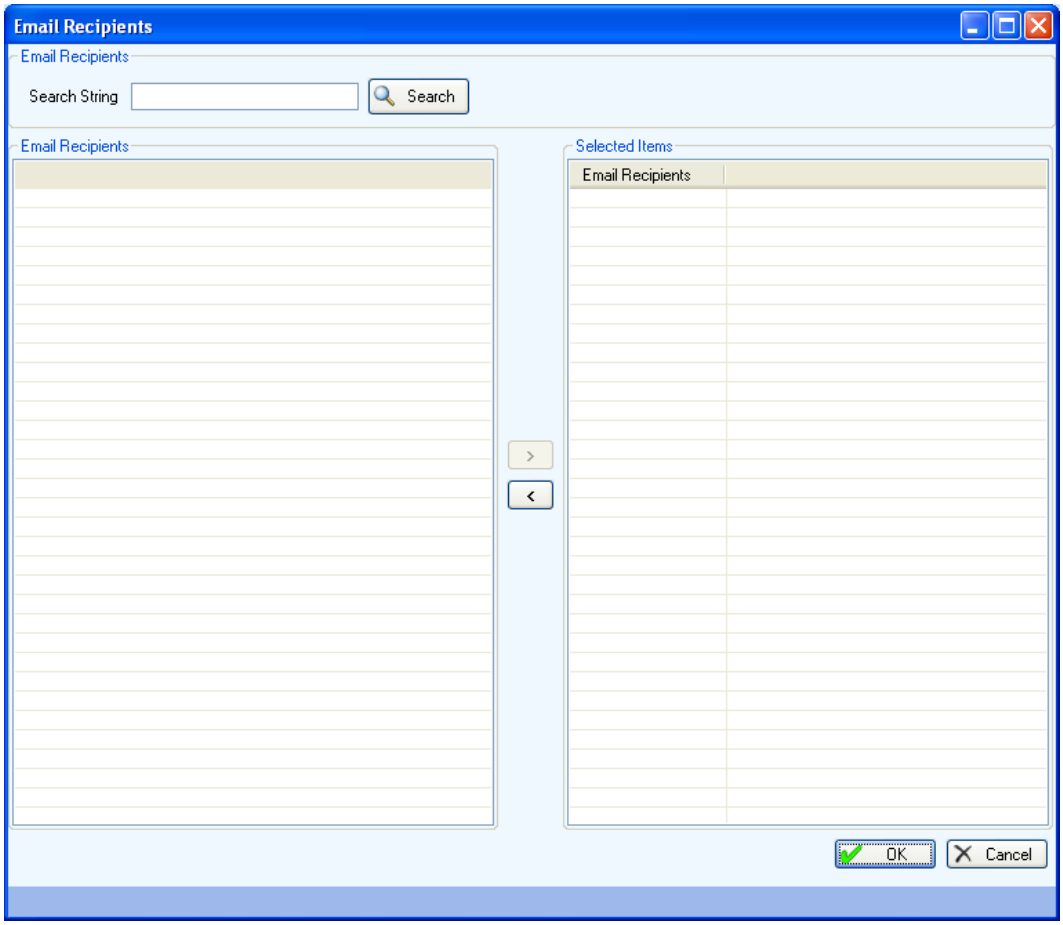


Figure 6-14: Visual CRS **Set up Area Automated Parameters** report **Email Recipients** dialog

4. To locate a specific email recipients to receive alerts or mailman message if the report fails, do one of the following:

- To display all the available recipients in the **Email Recipients** list, leave the **Search String** field blank and click **Search**.

Note:	The entire list of available recipients may be very long. Recipients are displayed as Last Name,First Name (e.g., DEMO,DOCTOR).

- Use the **Search String** field to filter the available recipient list.
  - To display all available recipients whose last name begins with a specific letter, type the letter in the **Search String** field and click **Search**.
  - To display all available recipients whose last names begin with a sequence of letters, type the letters at the beginning of the sequence in the **Search String** field and click **Search**.

Note:	Letters in the **Search String** field will be *included* in the filtered list.

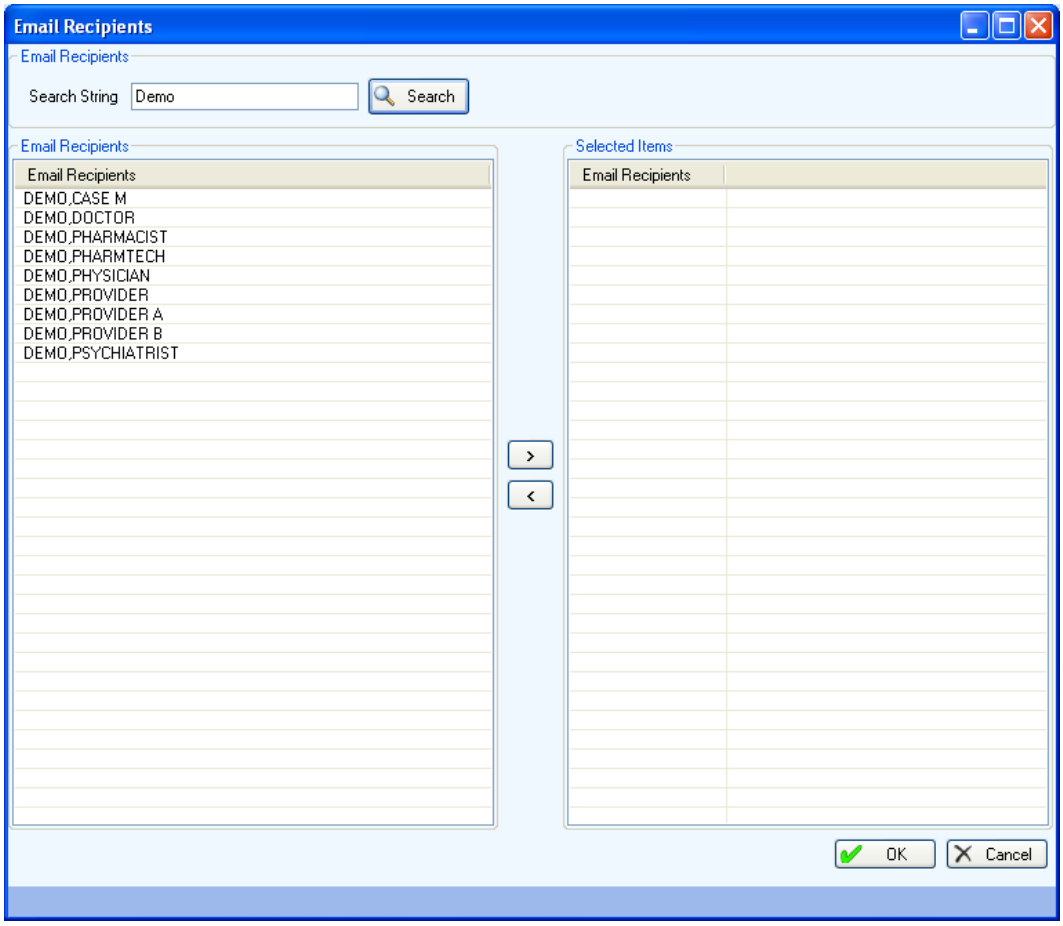


Figure 6-15: Visual CRS **Set up Area Automated Parameters** report filtered **Email Recipients** dialog

5. Scroll through the **Email Recipients** list to locate the recipient you want to use and click the recipient to highlight it.

6. To add/remove recipients for the report do one of the following:

   - To add recipients, scroll through the **Email Recipients** list to find the recipient or recipients you want to add and do one of the following:
     - Double click the recipients in the **Email Recipients** list to add the recipients to the **Selected Items** list.
     - Highlight the recipient in the **Email Recipients** list and click the Right Arrow button to add the recipient to the **Selected Items** list.
     - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous recipients and click the Right Arrow button to add the recipients to the **Selected Items** list.
     - Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous recipients and click the Right Arrow button to add the recipients to the **Selected Items** list.
   - To remove recipients from the report, scroll through the **Selected Items** list to find the recipient or recipients you want to remove and do one of the following:
     - Double click the recipients in the **Selected Items** list to remove the recipients from the list.
     - Highlight the recipient in the **Selected Items** list and click the Left Arrow button to remove the recipient from the list.
     - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous recipients in the **Selected Items** list and click the Left Arrow button to remove the recipients from the list.
     - Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous recipients in the **Selected Items** list and click the Left Arrow button to remove the recipients from the list.

7. When you have selected the recipients for the report, click **OK** to save and close the **Email Recipients** dialog

   To close the **Email Recipients** dialog without saving your selection, click **Cancel**.

6.9 Search Templates

6.9.1 Add/Overwrite Search Template

The **Create Search Template for National Patient List** and **GPRA/GPRAMA Forecast Patient List** reports allow users to add a new search template or overwrite an existing search template. To add or overwrite a search template:

1. Go to the **Search Template** dialog (Figure 6-16).

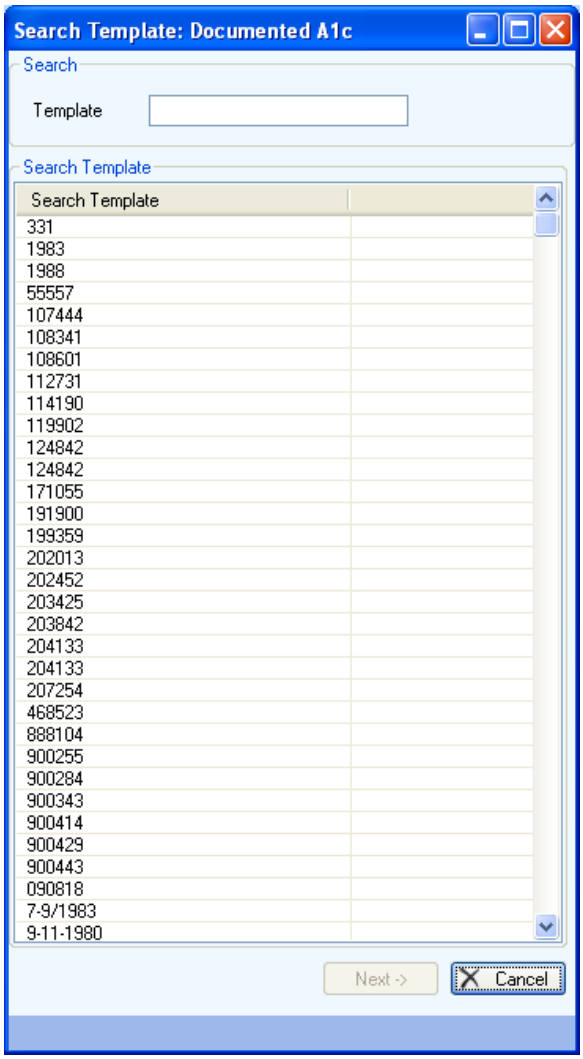


Figure 6-16: Visual CRS **Search Template** dialog

2. Do one of the following:

   - To create a new search template, type the name of the template in the **Template** field and click **Next to** display the **Add** dialog (Figure 6-17) and do one of the following:

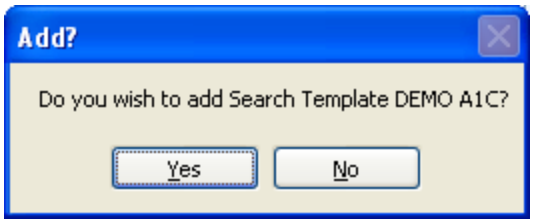


Figure 6-17: Visual CRS **Add** dialog

  – To create the template, click **Yes**.
  – To cancel without creating the template, click **No** to return to the **Search Template** dialog.

- To overwrite an existing template, scroll through the **Search Template** list, click the template name in the **Search Template** list to highlight it, and click **Next to** display the **Overwrite** dialog (Figure 6-18) and do one of the following:
  – To overwrite the template, click **Yes**.
  – To cancel and return to the **Search Template** dialog without overwriting the template, click **No**.

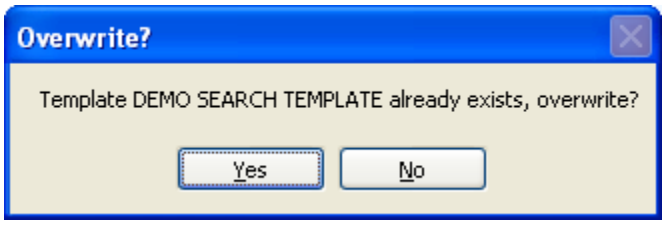


Figure 6-18: Visual CRS **Overwrite** dialog

- To locate an existing template, type the first letter or letters of the template name in the **Template** field.

  If the template is already selected, click **Next**; otherwise, click the template name and click **Next** to display the **Overwrite** dialog (Figure 6-18) and do one of the following:
  – To overwrite the template, click **Yes**.
  – To cancel and return to the **Search Template** dialog without overwriting the template, click **No**.
- To exit or cancel the **Search Template** dialog without creating or overwriting a search template, click the Close Window button in the upper right corner or click **Cancel** in the lower right corner to display the **Cancel Selection** dialog (Figure 6-19) and do one of the following:
  – Click **Yes** to close the **Search Template** dialog and return to the report pane.
  – Click **No** to return to the **Search Template** dialog.

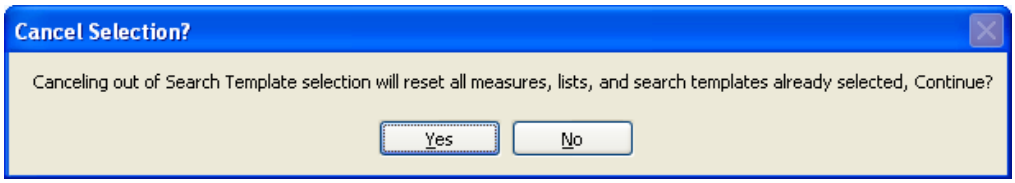


Figure 6-19: Visual CRS **Cancel Selection** dialog

6.9.2 Select a Search Template

6.9.2.1 Create Search Template for National Patient List

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 with Patient Panel Population report uses a different window to select search templates. See Sections 3.2.2, Selected Measures with Patient Panel Population Report, and 6.9.2.2, Selected Measures with Patient Panel Population Report, for more information.
>
> See Section 5.7 in the *CRS Version 17.1 User Manual* for more information about creating search templates.

To select a search template for the report:

1. Click the Search button next to the **Search Template** field to display the **Search Templates** dialog.

> **Note:** A report can be run for only one search template at a time.

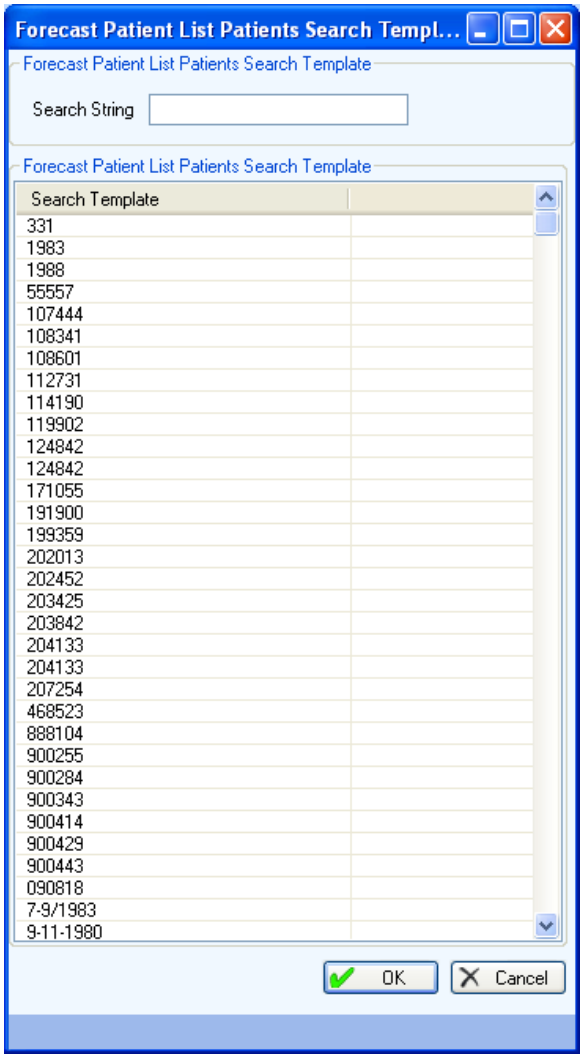


Figure 6-20: Visual CRS **GPRA/GPRAMA Forecast Patient List Search Template** dialog

2. To locate a specific search template, do one of the following:

   - Scroll through the **Search Template** list to locate the target template and click the template to highlight it.
   - Type the first letter or letters of the template name in the **Search String** field.

     If the template is already selected, click **OK**; otherwise, click the template name to highlight it and then click **OK** to save and close the **Search Template** dialog and return to the report pane.

   - To close the **Search Template** dialog without saving your selection, click **Cancel**.

6.9.2.2 Selected Measures with Patient Panel Population Report

The **Selected Measures with 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 Sections 3.1.7, GPRA/GPRAMA Forecast Patient List, 3.3.5.2, Patient Education with Patient Panel Population, and 6.9.2, Select a Search Template, for more information.
> See Section 5.7 in the *CRS Version 17.1 User Manual* for more information about creating search templates.

To select a provider for the report:

1. Click the Search button next to the **Search Template** field to display the **Search Templates** dialog.

> **Note:** A report can be run for only one search template at a time.

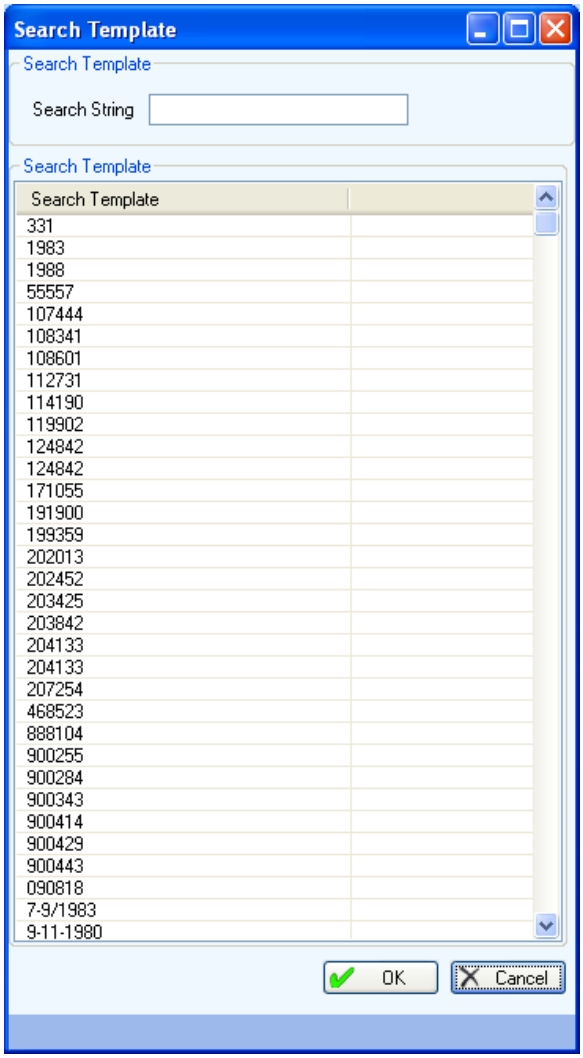


Figure 6-21: Visual CRS **Search Template** dialog

2. To locate a specific search template, do one of the following:

   - Scroll through the **Search Template** list to locate the template you want to use and click the template to highlight it.
   - If you know the name of the template, type the first letter or letters of the template name in the **Search String** field.

     If the template is already selected, click **OK**; otherwise, click the template name to highlight it and then click **OK** to save and close the **Search Template** dialog and return to the report pane.

   - To close the **Search Template** dialog without saving your selection, click **Cancel**.

6.10 Measures and Patient Lists

6.10.1 Select 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 sub-measure 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 Measures** button at the top of the **report** pane, as shown in Figure 6-22.

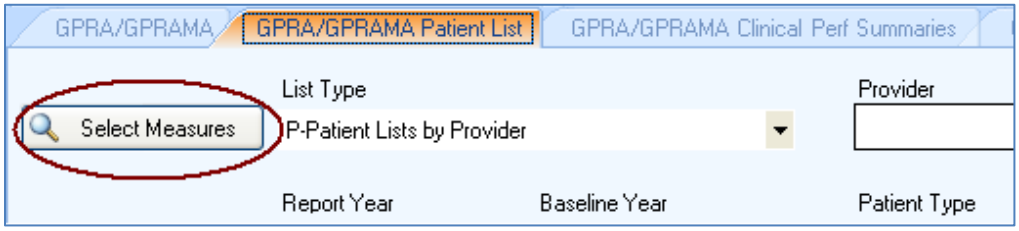


Figure 6-22: Visual CRS **Select Measures** button

> **Note**: For instructions on selecting performance measures and patient lists for reports with different options, see Sections 6.10.2, Select Performance Measures Only, and 6.10.3, Select Patient Lists Only. Click **Yes** to close the **Measures** dialog.
>
> Click **No** to return to the **Measures** dialog.

Select Patient Lists.

1. Click **Select Measures** at the top of the report pane to display the **Measures** dialog.

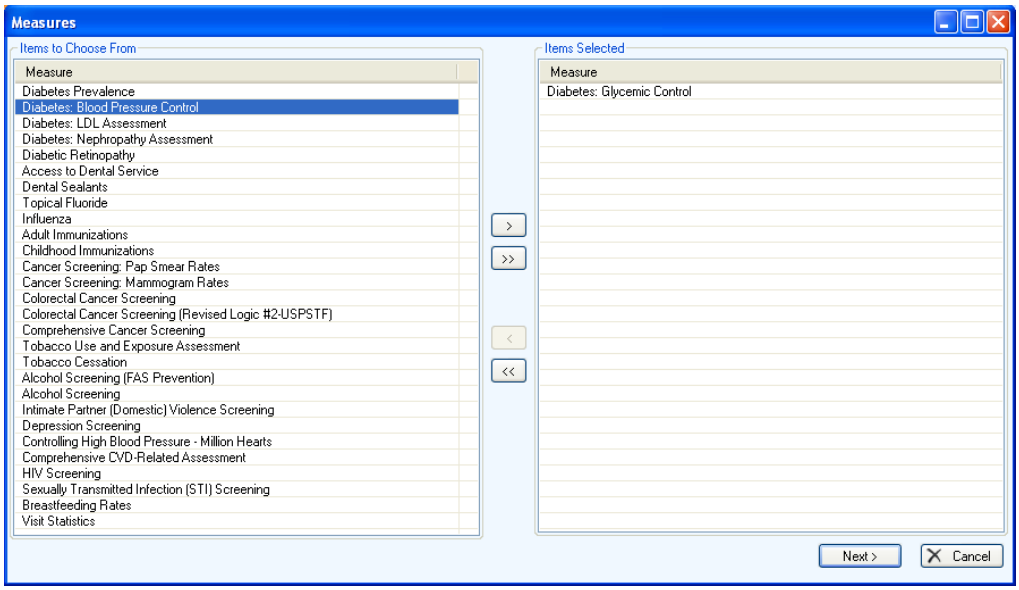


Figure 6-23: Visual CRS **Measures** dialog

> **Note:** Available performance measures appear in the **Items to Choose From** list (the left pane). If measures have been selected, they will appear in the **Items Selected** list (the right pane).

2. At the **Items to Choose From** list, do one of the following to add measures to the **Items Selected** list:

   - Double click the measure in the **Items to Choose From** list to add the measure to the **Items Selected** list.
   - Highlight the measure and click the Right Arrow button add the measure to the **Items Selected** list.
   - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous measures and click the Right Arrow button to add the measures to the **Items Selected** list.
   - Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous measures and click the Right Arrow button to add the measures to the **Items Selected** list.
   - Click the Double Right Arrow button to add all measures to the **Items Selected** list.

3. To remove measures from the **Items Selected** list do one of the following:

   - Double click the measure in the **Items Selected** list to remove the measure from the list.

- Highlight the measure in the **Items Selected** list and click the Left Arrow button to remove the measure from the list.
- Use the Shift-Up/Down Arrow keys to highlight multiple contiguous measures in the **Items Selected** list and click the Left Arrow button to remove the measures from the list.
- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous measures in the **Items Selected** list and click the Left Arrow button to remove the measures from the list.
- Click the Double Left Arrow button to remove all the measures in the **Items Selected** list.

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

4. After adding/removing measures in the, **Items Selected** list, do one of the following:

   - To close the **Measures** dialog without saving your selection, click **Cancel** or click the Close Window button in the top right corner to display the **Continue** dialog (Figure 6-24) and do one of the following:
     - Click **Yes** to close the **Measures** dialog.
     - Click **No** to return to the **Measures** dialog.

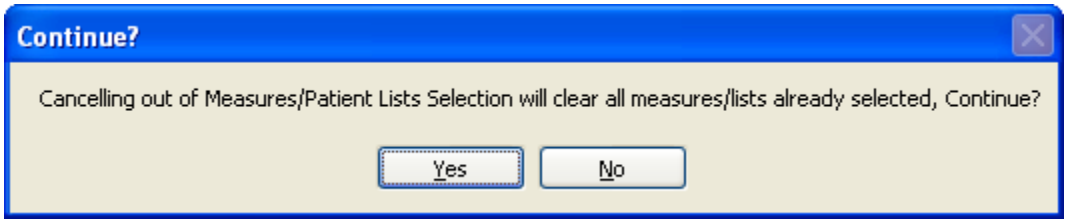


Figure 6-24: Visual CRS **Continue** dialog

   - To save the selected measures and display the **Patient List** dialog for each selected measure, click **Next**.

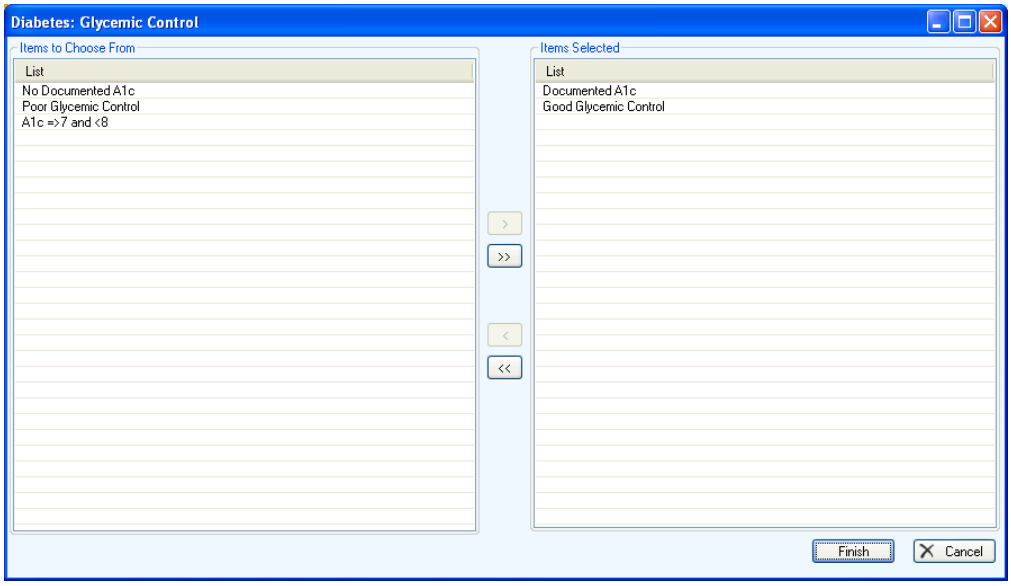


Figure 6-25: Visual CRS **Patient List** dialog

> **Note:** Available patient lists appear in the **Items to Choose From** list (on the left). If patient lists have been selected, they will appear in the **Items Selected** list (on the right).

5. In the **Patient List** dialog, do one of the following:

   - To select patient lists, follow the instructions in Step 2. To close the dialog and save the selected patient lists, click **Save**.

     If you selected more than one performance measure in Step 2, clicking **Next to** will display a new **Patient List** dialog for each measure selected. When you have selected patient lists for each measure, clicking **Finish** will close the **Patient List** dialog of the last measure selected and return to the **Report** pane. A green check mark will appear on the **Select Measures** button indicating measure and patient lists have been selected for the report.

   - To close the **Patient List** dialog without saving the selection, click **Cancel** or click the Close Window button in the top right corner to display the **Continue** dialog (Figure 6-26) and do one of the following:

     – Click **Yes** to close the **Patient List** dialog and return to the **Report** dialog.

> **Note:** By clicking **Yes**, the selected performance measures and patient lists will not be saved. To complete the report, at least one performance measure and patient list must be selected.

     – Click **No** to return to the **Patient List** dialog.

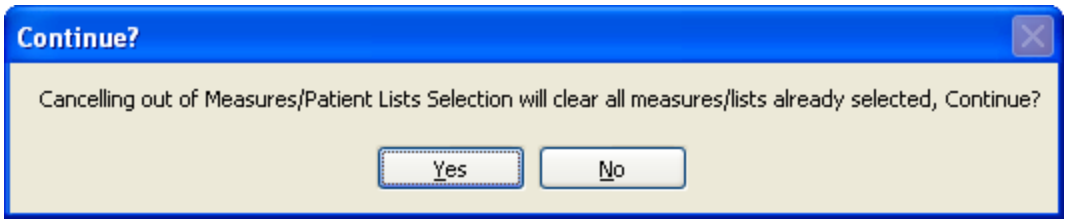


Figure 6-26: Visual CRS **Continue** dialog

6.10.2 Select Performance Measures Only

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 controls in the report definition window:

- An **All/Selected Measures** option button set allowing you to choose the **All** or **Selected** measures option followed by a search button, to display the **Selected** measures available from which to choose (Figure 6-27):

Figure 6-27: Visual CRS **All** or **Selected** measure option and search measures button

- A drop-down list with the **Selected Measures (User Defined)** option and a search button, to display the **Selected Measures (User Defined)** measures available to choose from, as shown in Figure 6-28:

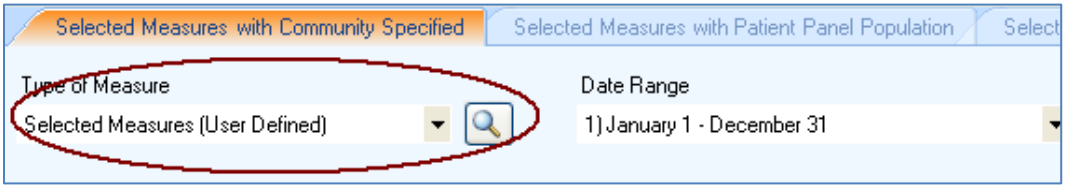


Figure 6-28: **Selected Measures (User Defined)** option and search button

  – Some report options also allow you to select one or more patient lists or sub-measures for each selected performance measure. See Section 6.10.3, Select Patient Lists for instructions.

Note:	For instructions on selecting performance measures and patient lists for reports with different options, see Section 6.10, Measures and Patient Lists.

1. Depending on the format of the report pane, to display the **Selected Measures (User Defined)** dialog:

- At the **All/Selected Measures** options, select **Selected** and click the Search button.
- From the **Type of Measure** list, choose **Selected Measures (User Defined)** and click the Search button.

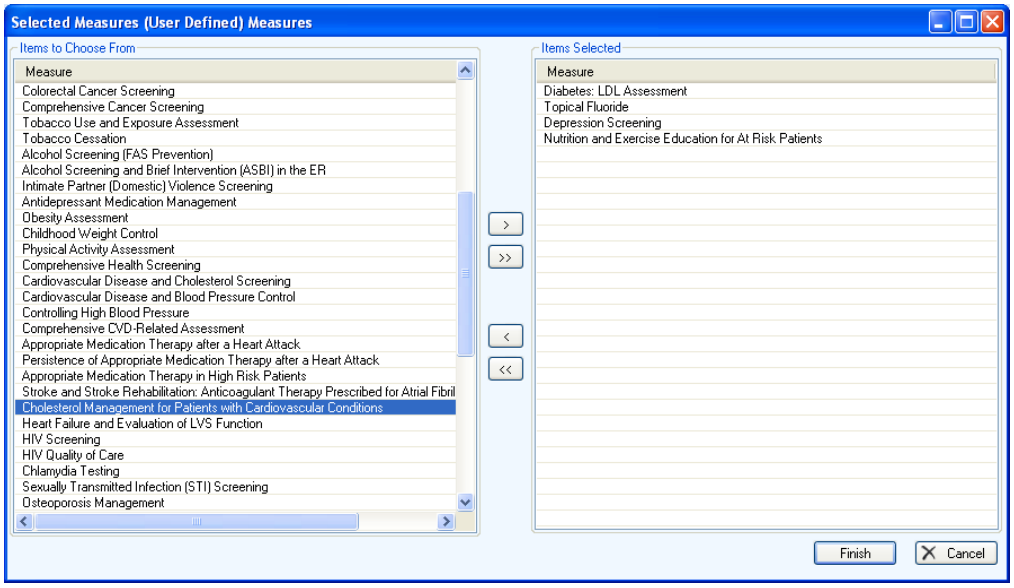


Figure 6-29: Visual CRS **Measures** dialog

> **Note:** Available performance measures appear in the **Items to Choose From** list (the left pane). If measures have been selected, they will appear in the **Items Selected** list (the right pane).

2. To add one or more measures to the **Items Selected** list, do one of the following:
   - Double click the measure in the **Items to Choose From** list.
   - Highlight the measure and click the Right Arrow button.
   - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous measures and click the Right Arrow button.
   - Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous measures and click the Right Arrow button.
   - Click the Double Right Arrow button (adds all measures to the list).
3. To remove measures from the **Items Selected** list do one of the following:
   - Double click the measure in the **Items Selected** list.
   - Highlight the measure in the **Items Selected** list and click the Left Arrow button.

- Use the Shift-Up/Down Arrow keys to highlight multiple contiguous measures in the **Items Selected** list and click the Left Arrow button.
- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous measures in the **Items Selected** list and click the Left Arrow button.
- Click the Double Left Arrow button (removes all measures from the list.

4. To save the selected measures and display the patient list dialog for each selected measure, click **Next**.

   - To close the **Measures** dialog without saving, click **Cancel** or click the Close Window button in the top right corner to display the **Continue** dialog (Figure 6-30):

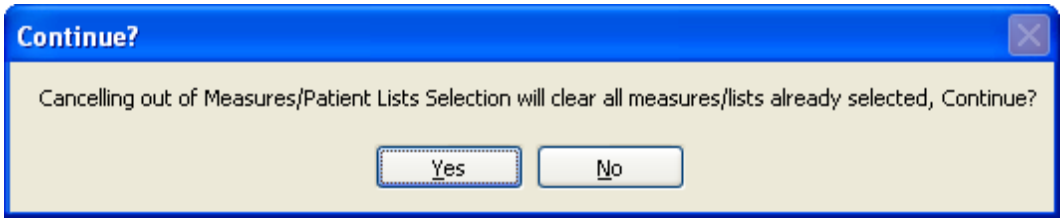


Figure 6-30: Visual CRS **Continue** dialog

   – Click **Yes** to close the **Measures** dialog.
   – Click **No** to return to the **Measures** dialog.

6.10.3 Select Patient Lists Only

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 **Patient Lists** option allowing you to choose **Yes** or **No** and a select lists button in the report window, to display the **Patient Lists** available to choose from (Figure 6-31).

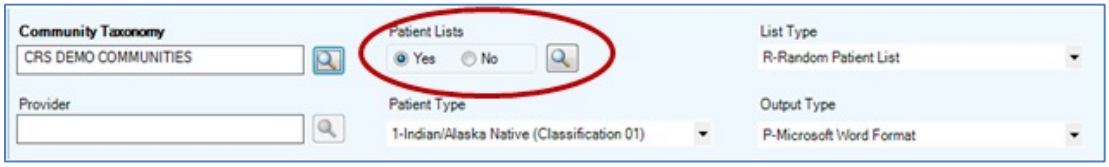


Figure 6-31: Visual CRS **Patient Lists** option with select lists button

The **Patient Lists** option buttons and select lists button are only active if you have already selected performance measures. See Section 6.10.2, Select Performance Measures, for instructions.

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The options at **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 Section 6.10, Measures and Patient Lists.

To select Patient Lists:

1. Click **Yes** at the **Patient Lists** option and click the adjacent Search button, to display the **Patient Lists** dialog (Figure 6-32).

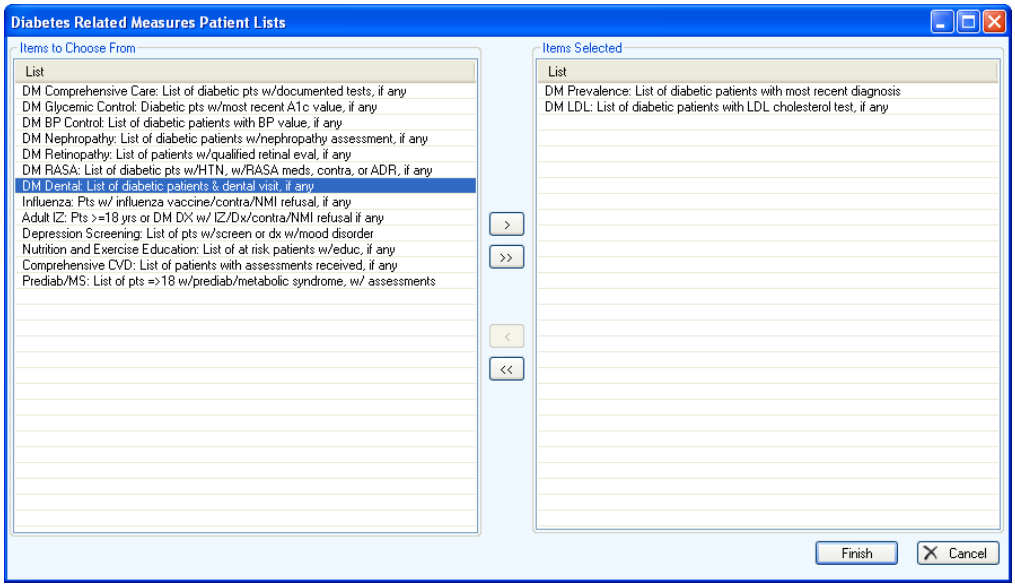


Figure 6-32: Visual CRS **Patient Lists** dialog with sample data

> **Note:** Available patient lists appear in the **Items to Choose From** list (the left pane). If patient lists have been selected, they will appear in the **Items Selected** list (the right pane).

2. At the **Items to Choose From** list, do one of the following to add patient lists to the **Items Selected** list:

   - Double click the patient list in the **Items to Choose From** list to add the patient list to the **Items Selected** list.
   - Highlight the patient list and click the Right Arrow button add the patient list to the **Items Selected** list.
   - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous patient lists and click the Right Arrow button to add the patient lists to the **Items Selected** list.

- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous patient lists and click the Right Arrow button to add the patient lists to the **Items Selected** list.
- Click the Double Right Arrow button to add all patient lists to the **Items Selected** list.

To remove patient lists from the **Items Selected** list do one of the following:

- Double click the patient list in the **Items Selected** list to remove the patient list from the list.
- Highlight the patient list in the **Items Selected** list and click the Left Arrow button to remove the patient list from the list.
- Use the Shift-Up/Down Arrow keys to highlight multiple contiguous patient lists in the **Items Selected** list and click the Left Arrow button to remove the patient lists from the list.
- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous patient lists in the **Items Selected** list and click the Left Arrow button to remove the patient lists from the list.
- Click the Double Left Arrow button to remove all the patient lists in the **Items Selected** list.

3. After adding/removing patient lists in the **Items Selected** list, do one of the following:

- To close the **Patient Lists** dialog without saving your selection, click **Cancel** or click the Close Window button in the top right corner to display the **Continue** dialog (Figure 6-33) and do one of the following:
  - Click **Yes** to close the **Patient Lists** dialog.
  - Click **No** to return to the **Patient Lists** dialog.

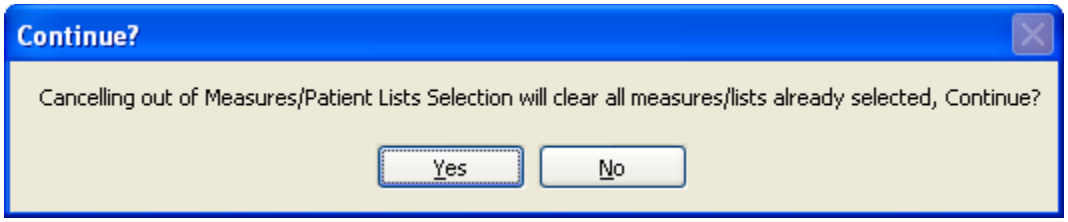


Figure 6-33: Visual CRS **Continue** dialog

6.11 Select Multiple Patients

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

This procedure applies to reports with a select **Patient** option and a search patient button in the report window, to display the **Select Patient** dialog, as shown in Figure 6-34.

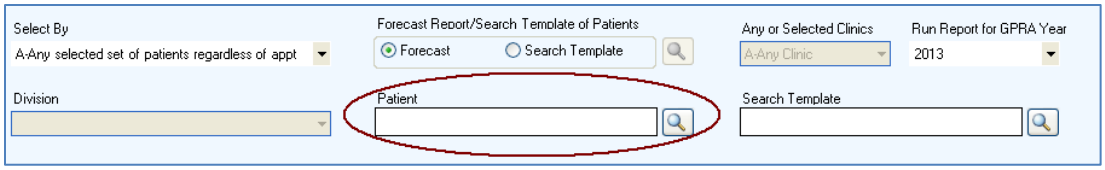


Figure 6-34: Visual CRS select **Patient** option and a search patient button

To select multiple patients:

1. Click the Search button next to the **Patient** field, to display the **Select Patient** dialog.

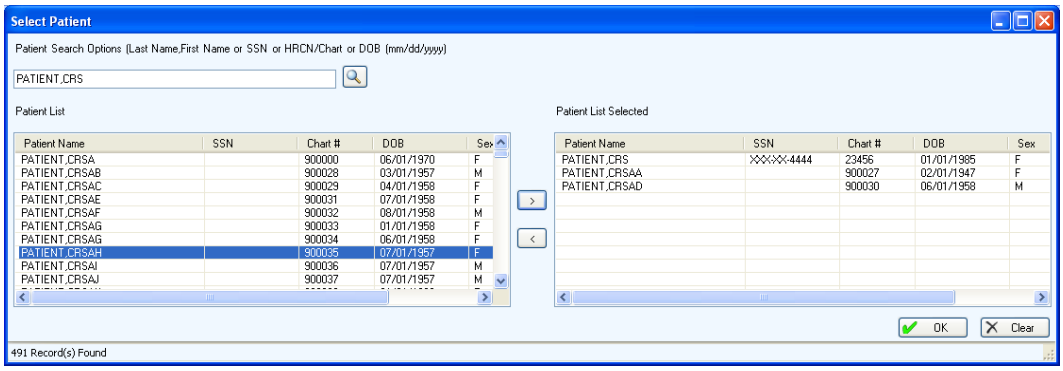


Figure 6-35: Visual CRS **Select Patient** dialog

> **Note:** Available patients will appear in the **Patient List** pane (the left pane) after you complete the next to step. If patients have been selected, they will appear in the **Patients List Selected** pane (the right pane).

2. In the **Patient Search Options** field, type all or part of a patient name (last name, or last name,first name), social security number, HRCN/Chart, or date of birth in the format MM/DD/YYYY and click the Search button next to the **Patient Search Options** field.

3. At the **Patient List** pane, do one of the following to add patients to the **Patient List Selected** pane:

   - Double click the patient in the **Patient List** pane to add the patient list to the **Patient List Selected** pane.
   - Highlight the patient and click the Right Arrow button add the patient list to the **Patient List Selected** pane.
   - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous patients and click the Right Arrow button to add the patients to the **Patient List Selected** pane.

- Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous patients and click the Right Arrow button to add the patients to the **Patient List Selected** pane.
- To locate different patients, do one of the following:
  - Repeat Step 2.
  - To clear the contents of the entire dialog and start over, click **Clear** and repeat Step 2.
- To remove patients from the **Patient List Selected** pane, do one of the following:
  - Double click the patient in the **Patient List Selected** pane to remove the patient from the list.
  - Highlight the patient in the **Patient List Selected** pane and click the Left Arrow button to remove the patient from the list.
  - Use the Shift-Up/Down Arrow keys to highlight multiple contiguous patients in the **Patient List Selected** pane and click the Left Arrow button to remove the patients from the list.
  - Press and hold the Ctrl key and use the mouse to highlight multiple contiguous or non-contiguous patients in the **Patient List Selected** pane and click the Left Arrow button to remove the patients from the list.

4. After adding/removing patients in the **Patient List Selected** pane, do one of the following:

- To save the selected patients and return to the **Report** pane, click **OK**.

Note:	The patient's name is displayed in the **Patient** field in the **Report Definition** pane. If multiple patients are selected the text **Multiple Patients Selected** will be displayed in the **Patient** field.

- To close the **Select Patient** dialog and return to the **Report** pane without saving your selection, click the Close Window button in the top right corner to display the **Continue** dialog (Figure 6-36) and do one of the following:
  - Click **Yes** to close the **Select Patient** dialog.
  - Click **No** to return to the **Select Patient** dialog.

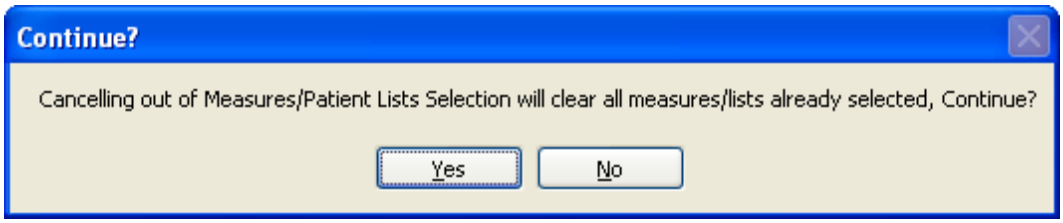


Figure 6-36: Visual CRS **Continue** dialog

6.12 Select 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:

- Select from a set of predefined date ranges.
  - For most reports, select one of four calendar year periods (January 1 – December 31, April 1 – March 31, July 1 – June 30, and October 1 – September 30).
  - See Section 6.12.1, Select a Predefined Date Range, for instructions.
- Run the report for a user-defined period.

  See Section 6.12.2, Specify a User-Defined Report Period, for instructions.

Reports such as the **National GPRA/GPRAMA Report** use a predefined report period of July 1, 2016 through June 30, 2017, with a baseline year of July 1, 2009 through June 30, 2010.

6.12.1 Select a Predefined Date Range

1. From the **Date Range** list, select one of the predefined calendar years or quarters.
   - January 1 – December 31
   - April 1 – March 31
   - July 1 – June 30
   - October 1 – September 30
2. In the **Report Year** field, do one of the following:
   - Type the year of the report end date.
   - Click the arrow to display the calendar, navigate to a month in the year of the report end date, and then click any date in that month.
3. If your report has a **Baseline Year** field, do one of the following:
   - Type the year of the baseline end date.
   - Click the arrow to display the calendar, navigate to a month in the year of the baseline end date, and then click any date in that month.

6.12.2 Specify a User-Defined Report Period

1. From the **Date Range** list, select **User Defined Report Period**.

2. Your report may have a **Report Year** field or a **Baseline Year** field. To set the date, do one of the following:
   - Type the year of the report year and baseline year end date.
   - Click the arrow to display the calendar, navigate to a month in the year of the report year and baseline year end date, and then click any date in that month.
3. Your report may have a **Begin Appointment Date** and **End Appointment Date** field. To set the date, do one of the following:
   - Select the month, date, and/or year that appears in the field. Type the month, date, and/or year of the date you want the report period to end, or use the UP and DOWN ARROW keys for each component to select the correct date.
   - Click the arrow to display the calendar, navigate to the month and year you want the report period to end, and then click the correct date in that month.
4. Your report may have a **Report End Date** or **Visit End Date** field. To set the date, do one of the following:
   - Select the month, day, and/or year that appears in the field. Type the month number, date, and/or year of the date you want the report period to end, or use the UP and DOWN ARROW keys for each component to select the correct date.
   - Click the arrow to display the calendar, navigate to the month and year you want the report period to end, and then click the correct date in that month.

6.13 Select 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.

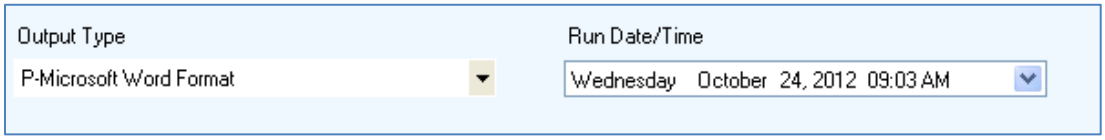


Figure 6-37: Visual CRS report **Output Type** and **Run Date/Time** options

To select report output options:

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

- **D-Microsoft Excel Format** to create a delimited file that can be opened in Microsoft Excel.
- **B-Both Microsoft Word and Excel Format** to create both a Word document and an Excel document.

2. To change the date the report will run, the **Run Date/Time** field do one of the following:
   - Click the arrow to display the calendar, and then click the date you want to run the report. The calendar closes and the selected date is displayed.
   - Click the month, the date, or the year, and then use the Up Arrow and Down Arrow keys on your keyboard to change the value.
3. To change the time of day the report will run, click the hour, the minutes, or AM or PM displayed next to the date, and then use the Up Arrow and Down Arrow keys on your keyboard to change the value.

6.14 View a Completed Report

The **Report Status** pane located in the bottom half of the Visual CRS window. Only reports that have already been run and display the word COMPLETED in the **Report Status** column can be viewed.

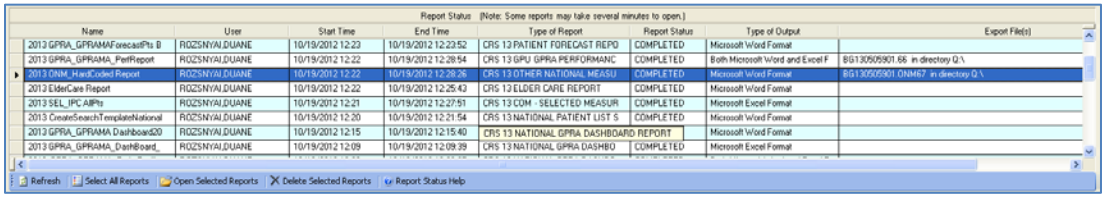


Figure 6-38: Visual CRS **Report Status** pane

- To view a report with a **Report Status** of COMPLETED, do one of the following to open the report files:
  - To open a single report, do one of the following:
    - Double click the COMPLETED report to be opened.
    - Highlight the COMPLETED and press the enter key.
    - Highlight the COMPLETED report to be opened and then click the **Open Selected Reports** button at the bottom of the **Report Status** pane.
  - To open multiple reports do one of the following
    - Use the mouse to highlight the COMPLETED reports to be opened and click the **Open Selected Reports** button at the bottom of the **Report Status** pane or press the Enter key.

- Use the Shift-Up/Down Arrow keys to highlight the COMPLETED reports to be opened and click the **Open Selected Reports** button at the bottom of the **Report Status** pane or press the Enter key.
- Press and hold the Ctrl key and click the mouse to highlight all the COMPLETED reports to be opened and click the **Open Selected Reports** button at the bottom of the **Report Status** pane or press the Enter key.
- If all reports have a report status of COMPLETED, click the **Select All Reports** button to highlight all reports and click the **Open Selected Reports** button at the bottom of the **Report Status** pane or press the Enter key.

- The **Type of Output** column displays the **Output Type** selected during the creation of the report. See Section 6.13, Select Report Output Options for instructions.
  - If **Microsoft Word Format** is displayed in the **Type of Output** column, the report will open in Microsoft Word.
  - If **Microsoft Excel Format** is displayed in the **Type of Output** column, the report will open in Microsoft Excel.
  - If **Both Microsoft Word and Excel Formats** is displayed in the **Type of Output** column, as the report is being opened, the **Open Reports** dialog (Figure 6-39) will be displayed and do one of the following:
    - To open the report in Microsoft Word, click **Word**.
    - To open the report in Microsoft Excel, click **Excel**.
    - To open the report in both Microsoft Word and Excel, click **Both**.
    - To cancel without opening the report in any format, click the Close Pane button in the top right corner of the **Open Reports** dialog.

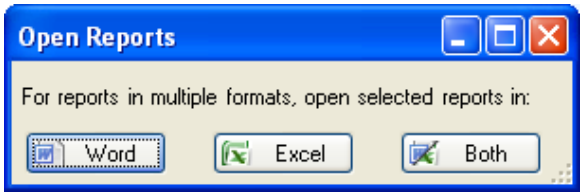


Figure 6-39: Visual CRS **Open Reports** dialog

- If the **Report Status** column contains **QUEUED**, the report is currently queued to run at a later time.
- If the **Report Status** column contains **RUNNING**, the report is currently being created.
- If the **Report Status** column contains **ERRORED**, the report encountered an error while being created.
- The **Type of Report** column will display the CRS report run.

- If the **Yes** option for **Export to Area** was selected in the report, the files exported will be displayed in the **Export Files** column.

6.15 View Existing CRS Reports

Reports get generated each time they are opened from the **Report Status** pane, which may take several minutes to open. Visual CRS automatically saves opened reports to the report directory created during the initial setup. Because the reports in this directory have been generated, CRS allows users to view existing reports in this directory more quickly.

1. On the **CRS** ribbon, select **View Existing CRS Reports** from the **Other** group.
2. Browse to the report directory, highlight the report you want to view, and click **Open**.

> **Note:** The report will open using the report output type selected when the report was created.

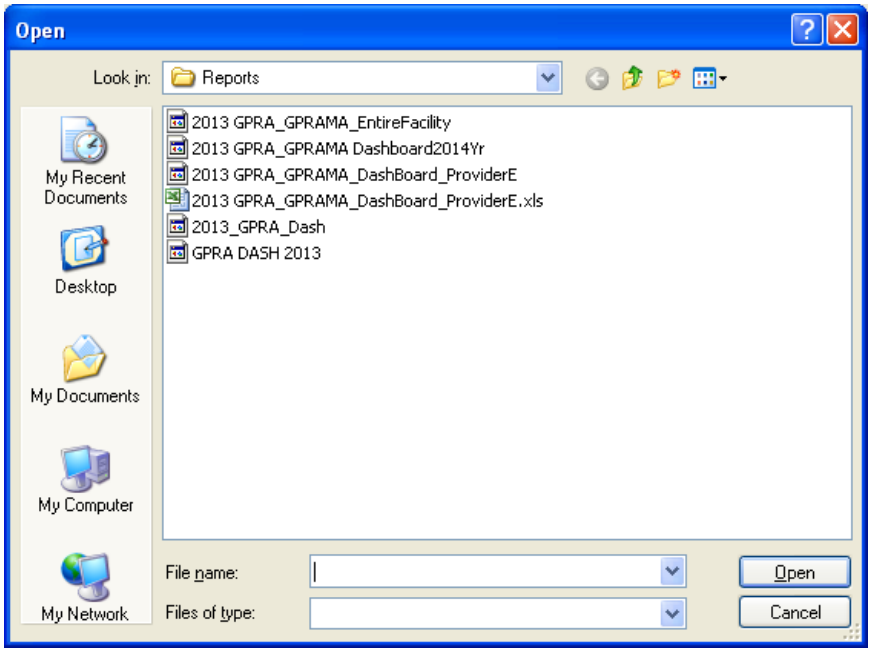


Figure 6-40: Visual CRS **Open** report pane

Appendix A: Rules of Behavior

The Resource and Patient Management (RPMS) system is a United States Department of Health and Human Services (HHS), Indian Health Service (IHS) information system that is ***FOR OFFICIAL USE ONLY***. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (RoB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general RoB for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS Web site: http://security.ihs.gov/.

The RoB listed in the following sections are specific to RPMS.

A.1 All RPMS Users

In addition to these rules, each application may include additional RoBs that may be defined within the documentation of that application (e.g., Dental, Pharmacy).

A.1.1 Access

RPMS users shall:

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or nonpublic agency information.
- Be aware that personal use of information resources is authorized on a limited basis within the provisions *Indian Health Manual* Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not:

- Retrieve information for someone who does not have authority to access the information.
- Access, research, or change any user account, file, directory, table, or record not required to perform their *official* duties.
- Store sensitive files on a PC hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their jobs or by divulging information to anyone not authorized to know that information.

A.1.2 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall:

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the functions they perform, such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

A.1.3 Accountability

RPMS users shall

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Log out of the system whenever they leave the vicinity of their personal computers (PCs).
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)
- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.

- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

A.1.4 Confidentiality

RPMS users shall:

- Be aware of the sensitivity of electronic and hard copy information, and protect it accordingly.
- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.
- Erase sensitive data on storage media prior to reusing or disposing of the media.
- Protect all RPMS terminals from public viewing at all times.
- Abide by all Health Insurance Portability and Accountability Act (HIPAA) regulations to ensure patient confidentiality.

RPMS users shall not:

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- Store sensitive files on a portable device or media without encrypting.

A.1.5 Integrity

RPMS users shall:

- Protect their systems against viruses and similar malicious programs.
- Observe all software license agreements.
- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not:

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.
- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

A.1.6 System Logon

RPMS users shall:

- Have a unique User Identification/Account name and password.
- Be granted access based on authenticating the account name and password entered.
- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

A.1.7 Passwords

RPMS users shall:

- Change passwords a minimum of every 90 days.
- Create passwords with a minimum of eight characters.
- If the system allows, use a combination of alpha-numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- Change vendor-supplied passwords immediately.
- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).
- Change passwords immediately if password has been seen, guessed, or otherwise compromised, and report the compromise or suspected compromise to their ISSO.
- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not:

- Use common words found in any dictionary as a password.
- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.
- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.
- Post passwords.
- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.

- Give a password out over the phone.

A.1.8 Backups

RPMS users shall:

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- Make backups of systems and files on a regular, defined basis.
- If possible, store backups away from the system in a secure environment.

A.1.9 Reporting

RPMS users shall:

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not:

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident gets reported more than once.

A.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall:

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on the screen after some period of inactivity.

A.1.11 Hardware

RPMS users shall:

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- Keep an inventory of all system equipment.

- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not:

- Eat or drink near system equipment.

A.1.12 Awareness

RPMS users shall:

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

A.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that:

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall:

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not:

- Disable any encryption established for network, internet, and Web browser communications.

A.2 RPMS Developers

RPMS developers shall:

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access, and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Follow industry best standards for systems they are assigned to develop or maintain, and abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not:

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

A.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators, have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall:

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owner should be replaced, not reissued.
- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and backup files.

- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or having the user answer a question that can be compared to one in the administrator's database.
- Shall follow industry best standards for systems they are assigned to, and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not:

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Acronym List

Acronym	Term Meaning
CAH	Critical Access Hospital
CHUI	Character-based User Interface
CPT	Current Procedural Terminology
CRS	Clinical Reporting System
EH	Eligible Hospital
EHR	Electronic Health Record
EP	Eligible Professional
GPRA	Government Performance Results Act
GPRAMA	Government Performance Results Act, Modernization Act of 2010
GUI	Graphical User Interface
ICD	International Classification of Diseases
IHS	Indian Health Service
RPMS	Resource and Patient Management System

Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

Phone: (888) 830-7280 (toll free)

Web: http://www.ihs.gov/helpdesk/

Email: support@ihs.gov