RESOURCE AND PATIENT MANAGEMENT SYSTEM

Clinical Reporting System

(BGP)

Visual CRS User Manual

Version 12.1
May 2012

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Preface

This user manual provides instructions for using Visual Clinical Reporting System (CRS) 2012–Version 12.1.

The contents of the Visual CRS 2012 User Manual are organized by subject matter, with chapters and pages corresponding to the Visual CRS v12.1 menu folders and options.

> **Note:** To avoid redundancy, this user manual does not include background information on such topics as security keys, report content, or a summary of changes in this version of the application. For this information, refer to the *CRS Version 12.1 User Manual*.
>
> For sample output and information on the logic used for each performance measure, refer to the *CRS Version 12.1 Clinical Performance Measure Logic Manual*.
>
> For information on installing the Visual CRS 2012 GUI on your Resource and Patient Management System server and client PC, refer to the *CRS Version 12.1 Installation Guide*.

1.0   Welcome to Visual CRS 2012

Visual Clinical Reporting System (CRS) 2012 is a graphical user interface (GUI) version of the CRS, Version 12.1 for FY 2012 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 12.1 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)

This manual in its entirety can be accessed from the Visual CRS 2012 application through the **Help** menu:

- To view the Help topics in a chapter, double-click the chapter icon ( ) or the chapter name in the **Table of Contents** pane.

- To view the Help topic for a specific report, do one of the following:

  - On the **CRS** ribbon, click .

  - In the **Report** window, click .
  - In the **Table of Contents** pane, click 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 2012 Help, click in the top right corner of the window.

2.0   The Visual CRS Main Window

The Visual CRS window contains the following items:

- **Menu Button**
- **CRS Ribbon**
- **Report Status Window**
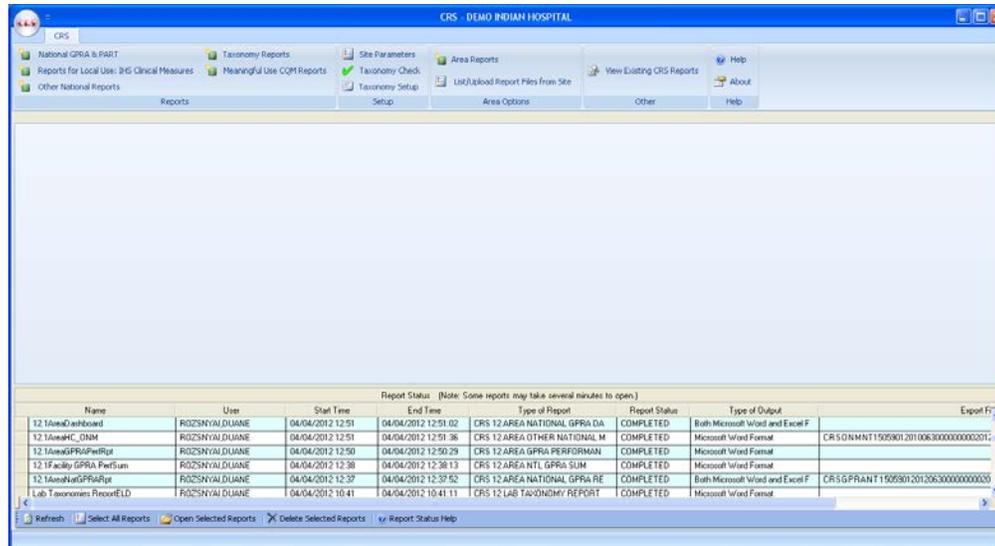
Figure 2-1: Visual CRS **Main** window

2.1   Menu Button

The **Menu** button is the circle located in the top left corner of the main window and provides the following options.

- **Change Division:** In a multi-divisional database system, allows you to run reports for other sites within the database.

- **Change Version:** Allows you to run reports using older versions of Visual CRS.

- **Change Report Directory:** Allows you to change the directory where your reports will be queued.

- **Exit:** Closes the Visual CRS window.
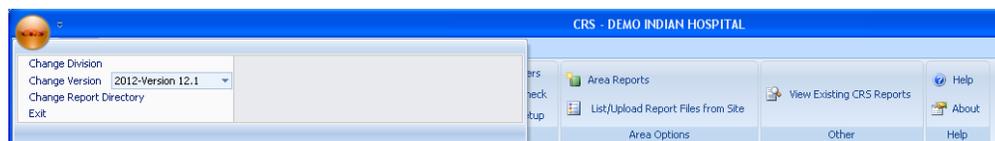
Figure 2-2: Visual CRS **Menu**

2.1.1   Change Division Option

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

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

1. Click **Menu** button at the top left corner of the **Visual CRS** window to display the **Menu** options.

2. Click **Change Division** option from the **Menu** drop down list to display the **Change Division** window.

3. Select the correct site from the **Division** list, and then click **OK** to close the **Change Division** window.

CRS reports will use data from the site you selected from the list. You must use the **Change Division** option again to log in to a different site.
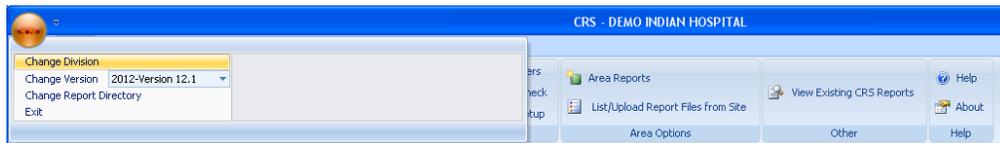
Figure 2-3: Visual CRS **Change Division** option

2.1.2   Change Version Option

You can run reports using older versions of Visual CRS. Each numbered version of Visual CRS includes performance measure logic that corresponds to a specific GPRA report year. For example, the current version of Visual CRS runs reports using the 2012 performance measure logic.

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

1. Click the **Menu** button at the top left corner of the **Visual CRS** window to display the **Menu** options.

2. To **Change Version**, click ▼ next to the **Change Version** option and select a version from the drop down menu.

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

> **Note:** Only reports for GPRA year 2012 can be run with this release. Use the previous released Visual CRS Version 11.1 to run reports for earlier GPRA years.
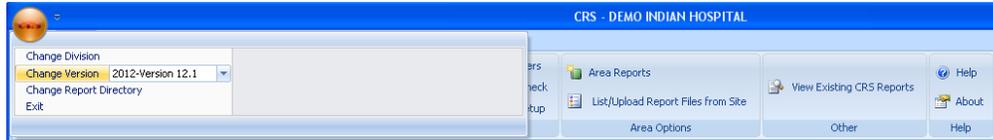
Figure 2-4: Visual CRS **Change Version** option

2.1.3   Change Report Directory Option

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

To change the report directory, follow these steps:

1. Click **Menu** button at the top left corner of the **Visual CRS** window to display the **Menu** options.

2. Click **Change Report Directory** from the **Menu** drop down list to display the **Browse For Folder** window.

    a. Select a directory by clicking ⊞ to the left of the folder name until you reach the directory where the reports should be queued.

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

Visual CRS reports can be placed on a local directory, a mapped directory, or a network share directory.
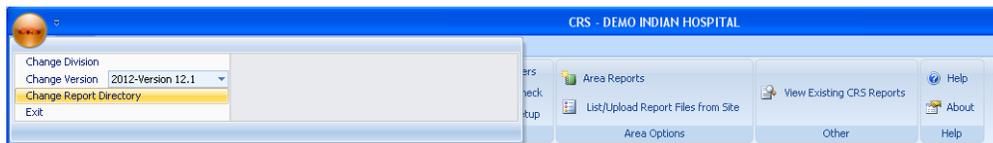
Figure 2-5: Visual CRS **Change Report Directory** option
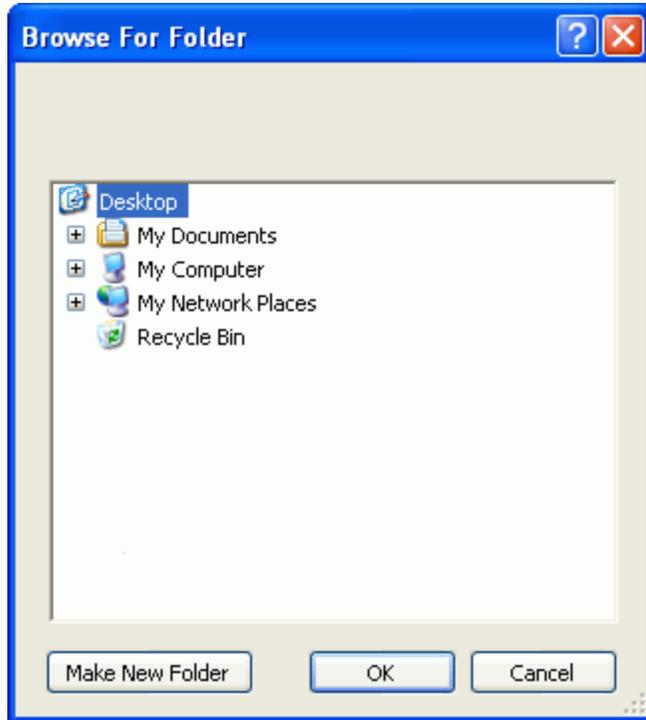
Figure 2-6: **Browse For Folder** window

2.1.4   Exit

To close Visual CRS, do one of the following:

Click the **Menu** button at the top left corner of the **Visual CRS** window to display the **Menu** options.

- Click **Exit** from the **Menu** drop down list to display the **Exit** window.
    - Click **Yes** or **No** to **Exit** and close **Visual CRS**
- Double click the **Menu** button at the top left corner of the **Visual CRS** to display the **Exit** window.
    - Click **Yes** or **No** to **Exit** and close **Visual CRS**
- Click ☒ in the top right-hand corner of the window to display the **Exit** window.
    - Click **Yes** or **No** to **Exit** and close **Visual CRS**
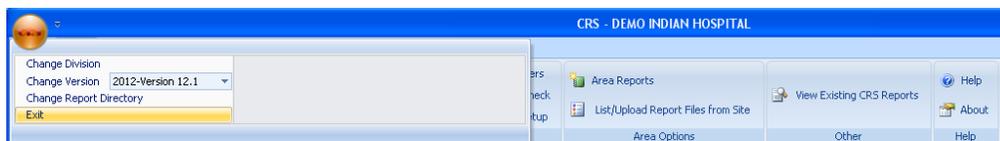
Figure 2-7: Visual CRS **Exit** option
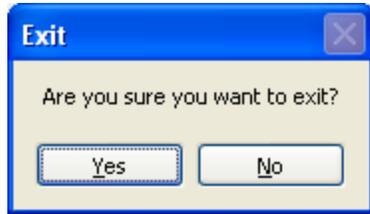
Figure 2-8: Visual CRS **Exit** confirmation window

2.2   CRS Ribbon

The **CRS** ribbon is a panel that consolidates the functionality of the **Visual CRS** application into one area and organizes independent commands into groups.

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

- Double click **CRS** at the top of the ribbon.

- Right click **CRS** and select the Minimize the Ribbon option.

- Click next to the **Menu** button and select the Minimize the Ribbon option

To restore the **CRS** ribbon, repeat any of the above.

The **CRS** ribbon provides 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.

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

2.2.1   Reports

This group lists all of the non- Area reports available in **Visual CRS** organized by report type. To display all the reports for a specific report type, click the on the report type you want to run from the **Reports** group. For example, if you want to run the National GPRA and PART Patient List report, click on **National GPRA and PART** in the **Reports** group and click the **National GPRA and PART Patient List** tab.

> **Note:** For details on how to run a report, see the Running Reports (Section 3.0) from the online help menu.

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

2.2.2   Setup

This group lists all the setup options for Visual CRS. To display the setup options for Visual CRS, click the setup option you want to view or modify from the **Setup** group. For example, if you want to modify the Site Parameters, click on **Site Parameters** in the **Setup** group.

> **Note:** For details on how to setup of Visual CRS, see the Setting Up Visual CRS (Section 4.0) from the online help menu.
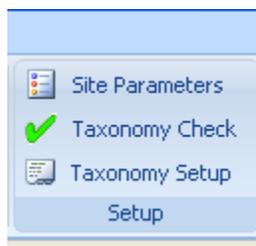
Figure 2-11: Visual **CRS** ribbon **Setup** group

2.2.3   Area Options

This group lists all the Area reports and Area options for Visual CRS. To display the Area options for Visual CRS, click the **Area** option you want to run, view or modify from the **Area Options** group. For example, if you want to run the Area GPRA and PART Performance report, click on **Area Reports** in the **Reports** group and click the **Area GPRA and PART Performance** tab.

> **Note:** For details on how to run an Area report or other Area options, see the Area Options (Section 5.0) from the online help menu.

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

2.2.4   Other

This group lists additional commands available for Visual CRS. To display the other commands for Visual CRS, click the command you want to execute. For example, if you want to View Existing CRS Reports, click on **View Existing CRS Reports** in the **Other** group.

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

2.2.5   Help

This group lists the help commands available for Visual CRS. To display the help commands for Visual CRS, click the command you want to execute. For example, if you want to open the Visual CRS Help documentation, click on **Help** in the **Help** group.

> **Note:** For details on how to run the Help and About commands, see the Basic Operations in Visual CRS (Section 6.1) from the online help menu.
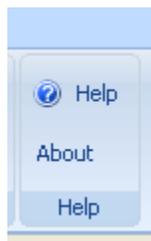
Figure 2-14: Visual **CRS** ribbon **Help** group

2.3   Report Status Window

The **Report Status** window located in the bottom half of the Visual CRS window lists the reports run by Visual CRS and are stored in the **Default Directory**. 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 window 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** window provides the following options:

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

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

2.3.1   Refresh Button

To refresh the report status of the listed reports, click the **Refresh** button at the bottom of the **Report Status** window.

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

2.3.2   Select All Reports Button

To select all of the reports listed in the window, click the **Select All Reports** button at the bottom of the **Report Status** window.

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

2.3.3   Open Selected Reports Button

The **Open Selected Reports** button will open all highlighted reports with a report
status of "COMPLETED". 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" 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** window.

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**
  window 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** window or press the Enter key.

- Press and hold the Ctrl key and use 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** window 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** window or press the Enter key.

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

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

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

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

2.3.4   Delete Selected Reports Button

The **Delete Selected Reports** button will delete all highlighted reports with a report status of "COMPLETED".

To delete a single report, highlight the "COMPLETED" report to be deleted and then click the **Delete Selected Reports** button at the bottom of the **Report Status** window.

To delete multiple reports do one of the following:

- Use the mouse to highlight the "COMPLETED" reports to be deleted and click the **Delete Selected Reports** button at the bottom of the **Report Status** window.

- Use the Shift + Up/Down Arrow keys to highlight the "COMPLETED" reports to be deleted and click the **Delete Selected Reports** button at the bottom of the **Report Status** window.

- Press and hold the Ctrl key and use the mouse to highlight all the "COMPLETED" reports to be deleted and click the **Delete Selected Reports** button at the bottom of the **Report Status** window.

- If all reports have a report status of "COMPLETED", click the **Select All Reports** button to highlight all reports and click the **Delete Selected Reports** button at the bottom of the **Report Status** window.

Figure 2-22**:** Visual CRS **Report Status** select and delete a single report
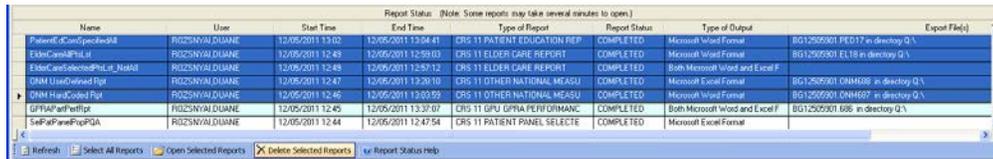
Figure 2-23: Visual CRS **Report Status** select and delete multiple reports

Figure 2-24: Visual CRS **Report Status** select and delete reports using Ctrl key
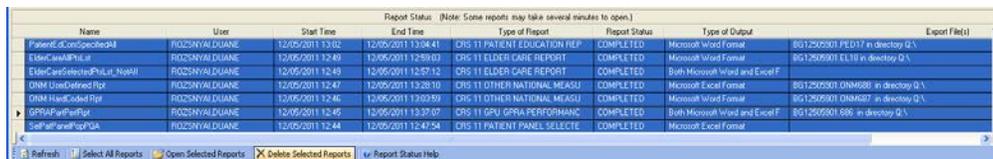
Figure 2-25: Visual CRS **Report Status** select and delete all completed reports

2.3.5   Report Status Help Button

The **Report Status Help** button will open the Visual CRS online help documentation for the **Report Status** window.

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

2.3.6   Customize Columns

Visual CRS allows users to customize how the data is being displayed in the **Report Status** window by doing one of the following:

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

Users can arrange the columns in any order.

- To move a column highlight the column, click and hold the left mouse button, and drag the column to the desired location.

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

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

Sort columns in ascending or descending order.

- Click the column name to sort that column in ascending order, click the column name again to sort that column in descending order.

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

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

3.0   Running Reports

If your RPMS Demo/Test Patient Search Template does not contain any patients you will only receive the following pop-up message once when accessing the reports for the first time.

> **Note**: See Creating or Selecting a Demo/Test Patient Search
>   Template (Section 6.3) for information about creating or
>   selecting Demo/Test patients.
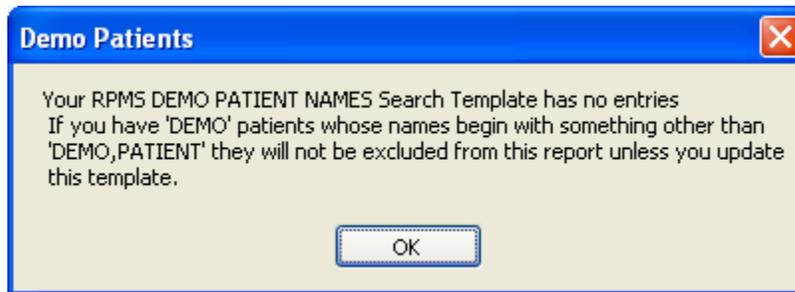
Figure 3-1: Visual CRS **Demo Patients** pop-up message

- Click **OK** to continue.

3.1   National GPRA & PART Reports

3.1.1   National GPRA & PART Report

Use this option to produce a National GPRA & PART Report for the 2012 GPRA year using the performance measure definitions from CRS Version 12.1. The following parameters are predefined for this report:

- A report period of July 1, 2011 through June 30, 2012

- A baseline year of July 1, 1999 through June 30, 2000

- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

> **Note**: See Section 5.2 in the *CRS Version 12.1 User Manual* for
>   additional information on the National GPRA & PART
>   Report.

3.1.1.1   Run the National GPRA & PART Report

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports** group.

2. Click the **GPRA & PART** tab to display the **GPRA & PART Report** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
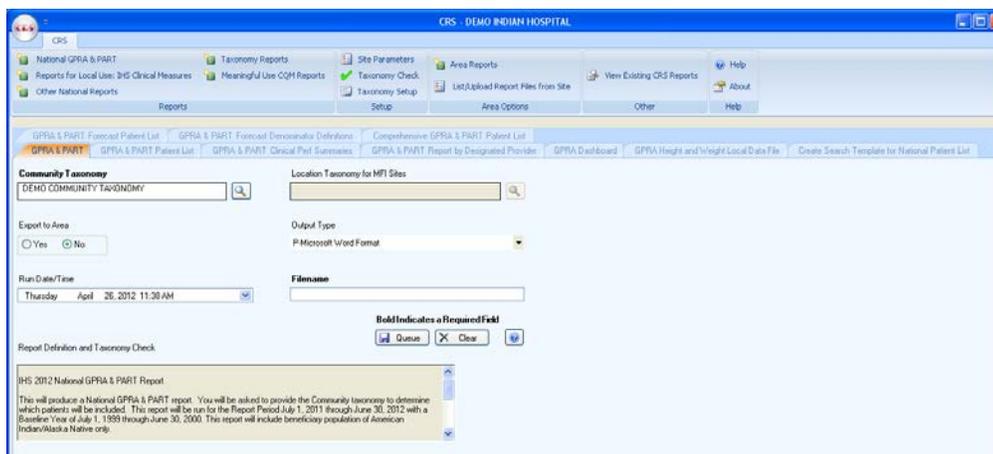
Figure 3-2: Visual CRS **GPRA and PART Report** window

4. Under **Community Taxonomy**, do one of the following:

- To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

- To select a different community taxonomy, click the [Q] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

If your facility is within the Alaska Area and is an MFI site, click the [Q] button next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

6. Under **Export to Area**, do one of the following:

- To send final data to your Area Office, click **Yes**.

If you choose to export the data to your Area Office, the software checks the **Export Height and Weight Data** site parameter. If this parameter is set to "No," the warning message shown below is displayed.
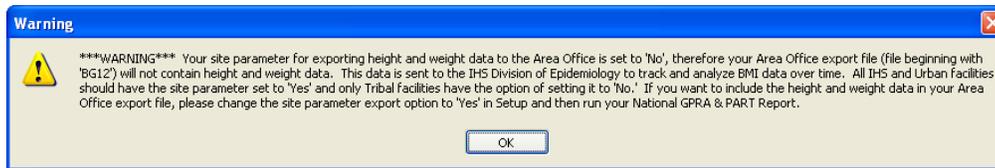
Figure 3-3: Visual CRS Export to Area parameter set to "No" pop-up message

If the **Export Height and Weight Data** site parameter is set to "Yes", the following information message shown below will be displayed.
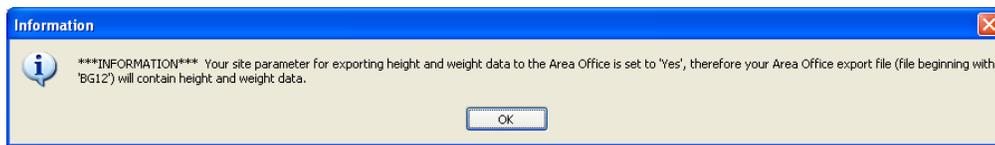
Figure 3-4: Visual CRS Export to Area parameter set to "Yes" pop-up message

For more information on setting site parameters, see Site Parameters (Section 4.3).

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

> **Note:** The ability to create a local height and weight data file is located in the GPRA Height and Weight Local Data File (Section 3.1.6.1) report.

7. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

8. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.2   National GPRA & PART Report Patient List

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

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The **GPRA & PART Report Patient List** menu option will not be displayed for users without this security key.
>
> See Section 5.3 in the *CRS Version 12.1 User Manual* for additional information on the National GPRA and PART Patient List.

3.1.2.1 Run the National GPRA & PART Report Patient List

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports** group.

2. Click the **GPRA & PART Patient List** tab to display the **GPRA & PART Report Patient List** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.

Figure 3-5: Visual CRS **GPRA and PART Patient List Report** window

4. To select performance measures and patient lists, click the **Select Measures** button in the top left corner of the report window and follow the instructions in Selecting Measures and Patient Lists (Section 6.12).

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

   - **R - Random Patient List**

- **P - Patient Lists by Provider**

  To select a provider, click the next to the **Provider** box and follow the instructions in **Selecting a Provider** (Section 6.7).

- **A - All Patients**

6. To set the **Date Range, Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

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

   - **2 - Not Indian Alaskan/Native (Not Classification 01)**

   - **3 - All (Both Indian/Alaska Natives and Non-01)**

8. Under **Community Taxonomy**, do one of the following:

   - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 9. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

   - To select a different community taxonomy, click the button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   - If your facility is within the Alaska Area and is an MFI site, click the button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

10. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

11. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.3   National GPRA & PART Clinical Performance Summaries

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

- A report period of July 1, 2011 through June 30, 2012

- A baseline year of July 1, 1999 through June 30, 2000

- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

> **Note:** See Section 5.4 in the *CRS Version 12.1 User Manual* for additional information on the National GPRA and PART Clinical Performance Summaries Report.

3.1.3.1   Run the National GPRA & PART Clinical Performance Summaries

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the Reports group.

2. Click the **GPRA & PART Clinical Perf Summaries** tab to display the **GPRA & PART Clinical Perf Summaries** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
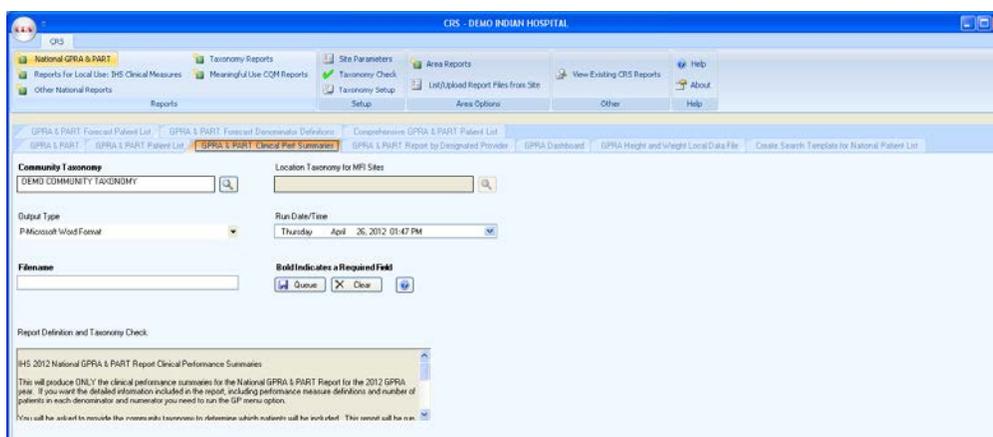
Figure 3-6: Visual CRS **GPRA and PART Clinical Perf Summaries Report** window

4. Under **Community Taxonomy**, do one of the following:

- To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

- To select a different community taxonomy, click the button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   - If your facility is within the Alaska Area and is an MFI site, click the button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

6. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

7. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.4   National GPRA & PART Report by Designated Provider

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

- A report period of July 1, 2011 through June 30, 2012

- A baseline year of July 1, 1999 through June 30, 2000

- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

> **Note:** See Section 5.5 in the *CRS Version 12.1 User Manual* for additional information on the National GPRA and PART Report by Designated Provider.

3.1.4.1   Run the National GPRA & PART Report by Designated Provider

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports** group.

2. Click the **GPRA & PART Report by Designated Provider** tab to display the
    GPRA & PART Report by Designated Provider window containing
    information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if
    the message "All taxonomies are present." is displayed then the taxonomies
    required for all National GPRA & PART 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 & PART reports. Click **Taxonomy Setup** (Section 4.2) option in
    the **Setup** group to set up and populate the required taxonomies.
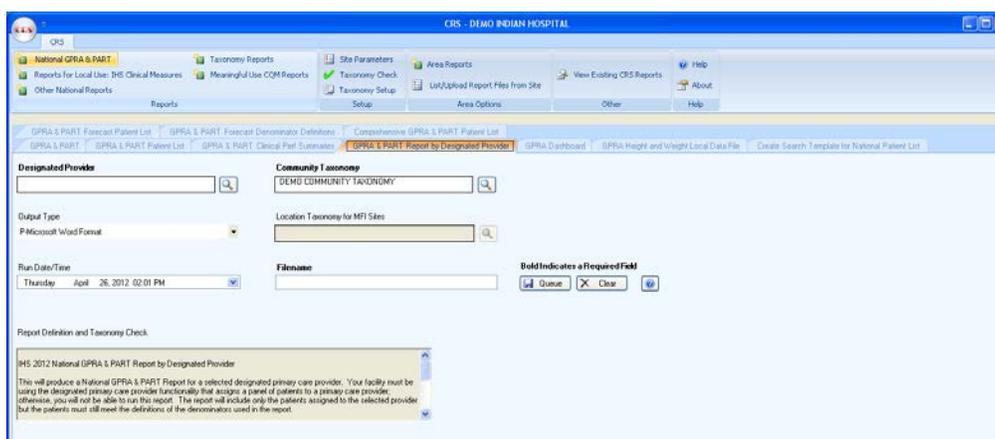
Figure 3-7: Visual CRS **GPRA and PART Report by Designated Provider Report** window

4. To select the designated provider to report on, click the [🔍] button next to the
    Designated Provider box and follow the instructions in Selecting a Provider
    (Section 6.7).

5. Under **Community Taxonomy**, do one of the following:

    •   To use the default community taxonomy displayed in the **Community
        Taxonomy** box, skip to Step 6. (Your site's default community taxonomy is
        defined using the **Site Parameters** (Section 4.3) option.)

    •   To select a different community taxonomy, click the [🔍] button next to the
        Community Taxonomy box and follow the instructions in Selecting a
        Community Taxonomy (Section 6.4).

6. To select the report output type and change the time and date for the report to run,
    follow the instructions in Selecting Report Output Options (Section 6.17).

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

- If your facility is within the Alaska Area and is an MFI site, click the 🔍 button next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

8. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.5   National GPRA Dashboard

Use this option to produce a file for your local facility to use for all active clinical patients 0 to 65 years of age who are included in the National GPRA & PART Report. The file contains visit data including height and/or weight measurements taken during the period from July 1, 2011 through June 30, 2012. The following parameters are predefined for this file:

- A report period of July 1, 2011 through June 30, 2012

- A baseline year of July 1, 1999 through June 30, 2000

- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

> **Note:** See Section 5.6 in the *CRS Version 12.1 User Manual* for additional information on the National GPRA Dashboard.

3.1.5.1   Run the National GPRA Dashboard

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports** group.

2. Click the **GPRA Dashboard** tab to display the **GPRA Dashboard** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
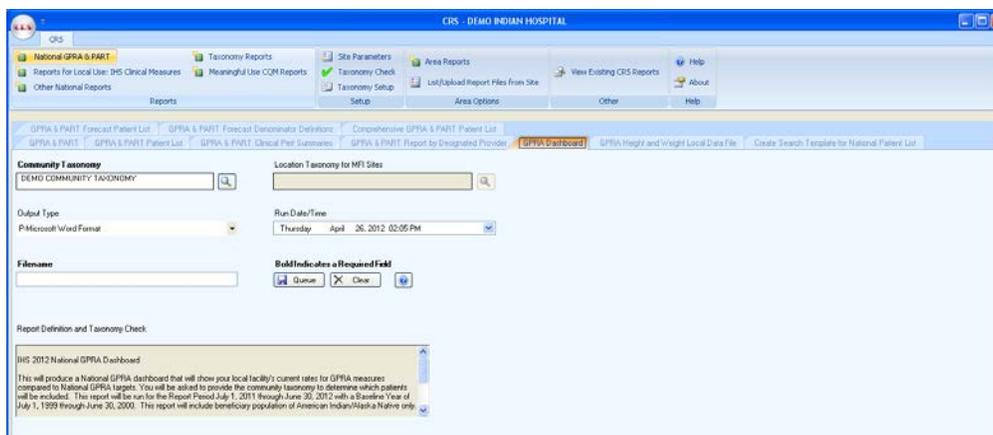
Figure 3-8: Visual CRS **GPRA Dashboard Report** window

4. Under **Community Taxonomy**, do one of the following:

   - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

   - To select a different community taxonomy, click the [🔍] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   - If your facility is within the Alaska Area and is an MFI site, click the [🔍] button next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

6. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

7. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.6   National GPRA Height and Weight Local Data File

Use this option to produce a file for your local facility's use listing all active clinical patients 0 to 65 years of age who are included in the National GPRA & PART Report. The file contains visit data including height and/or weight measurements taken during the period from July 1, 2011 through June 30, 2012. The following parameters are predefined for this file:

- A report period of July 1, 2011 through June 30, 2012

- A baseline year of July 1, 1999 through June 30, 2000

- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

> **Note:** See Section 5.7 in the *CRS Version 12.1 User Manual* for additional information on the National GPRA and PART Height and Weight Local Data File.

3.1.6.1   Create the National GPRA Height and Weight Local Data File

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports** group.

2. Click the **GPRA Height and Weight Local Data File** tab to display the **GPRA Height and Weight Local Data File** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
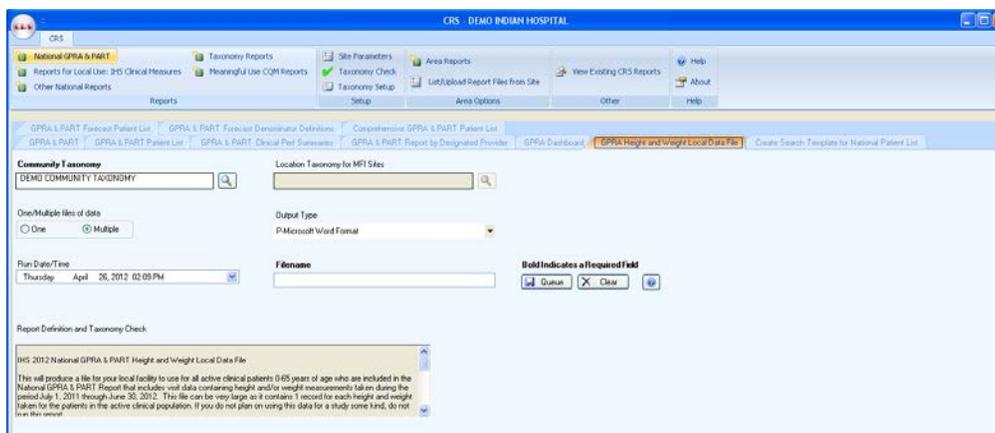
Figure 3-9: Visual CRS **GPRA Height and Weight Data File Report** window

4. Under **Community Taxonomy**, do one of the following:

- To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 5. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

- To select a different community taxonomy, click the button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

- If your facility is within the Alaska Area and is an MFI site, click the button next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

6. Under **One/Multiple files of data** do one of the following:

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

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

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

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

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

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

7. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

8. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.7   Create Search Template for National Patient List

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

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The **Create Search Template for National Patient List** menu option will not be displayed for users without this security key.
>
> See Section 5.8 in the *CRS Version 12.1 User Manual* for additional information on creating a search template for a national GPRA & PART patient list.

3.1.7.1   Create a Search Template for a National GPRA & PART Report Patient List

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports** group.

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

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
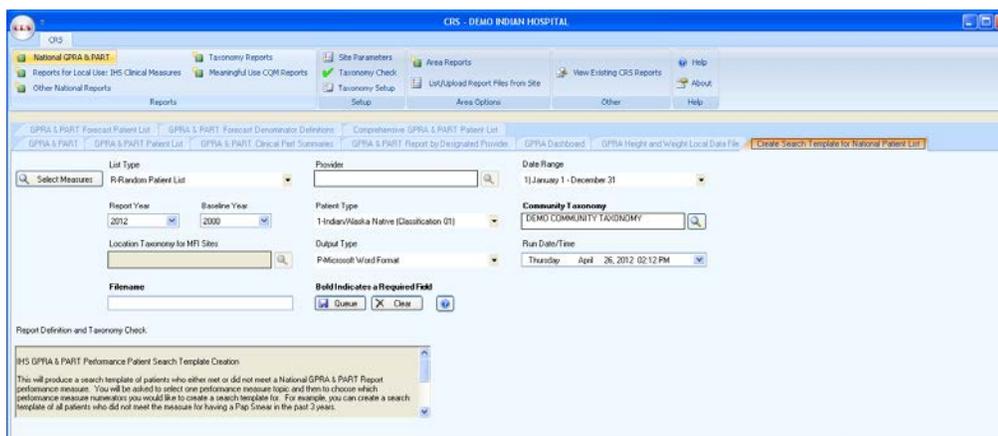
Figure 3-10: Visual CRS **Create Search Template for National Patient List** window

4. To select performance measures and patient lists, click the **Select Measures** button at the top of the window and follow the instructions in Selecting Measures and Patient Lists (Section 6.12).

   After selecting performance measures and patient lists, the **Search Template** window is displayed.
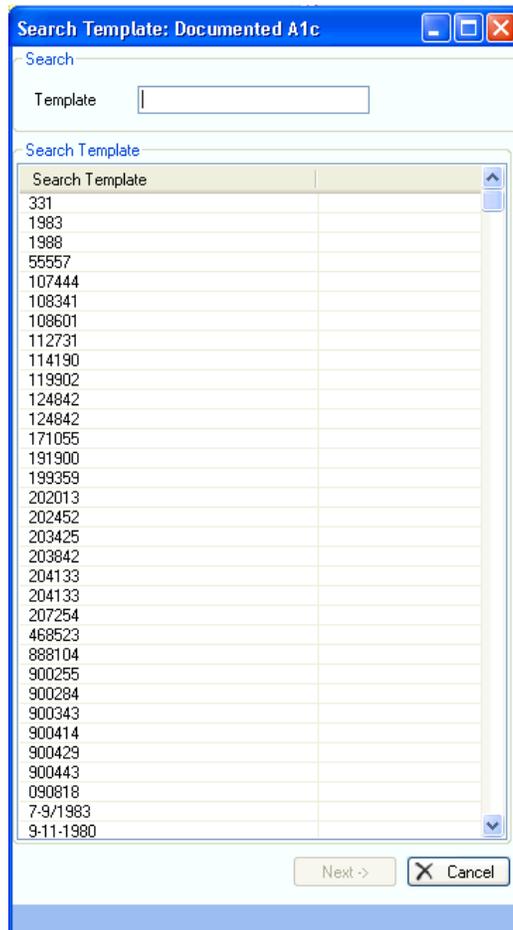
Figure 3-11: Visual CRS **Search Template** window

5. To add or overwrite a search template with the selected performance measures, follow the instructions in Add/Overwrite Search Template (Section 6.9).

6. In the **List Type** dropdown list, select one of the following:

   - **R - Random Patient List**

   - **P - Patient Lists by Provider**

   To select a provider, click the 🔍 next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

- **A - All Patients**

7. To set the **Date Range, Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in Selecting Report Dates(Section 6.16).

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

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

    - **2 - Not Indian Alaskan/Native (Not Classification 01)**

    - **3 - All (Both Indian/Alaska Natives and Non-01)**

9. Under **Community Taxonomy**, do one of the following:

    - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 10. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

    - To select a different community taxonomy, click the [Q] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

    - If your facility is within the Alaska Area and is an MFI site, click the [Q] button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

11. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

12. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.8   GPRA & PART Forecast Patient List

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

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The **GPRA & PART Forecast Patient List** menu option will not be displayed for users without this security key.
>
> See Section 5.9 in the *CRS Version 12.1 User Manual* for additional information on the GPRA & PART Forecast Patient List.

3.1.8.1 Run the GPRA & PART Forecast Patient List

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports** group.

2. Click the **GPRA & PART Forecast Patient List** tab to display the **GPRA & PART Forecast Patient List** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.

Figure 3-12: Visual CRS **GPRA & PART Forecast Patient List** window

4. In the **Select By** dropdown list, select the criteria to use for the forecast patient list. Click the criteria in the list below for more instructions.

- **C - By CLINIC NAME for a specified appointment date range** (Section 3.1.8.2)

- **P - Selected Patients w/Appointments** (Section 3.1.8.3)

- **D - One Facility's or Division's Appointments** (Section 3.1.8.4)

- **A - Any selected set of patients regardless of appointment status** (Section 3.1.8.5)

5. In the Run Report for GPRA Year dropdown list, select the criteria to use for the report.

- To run the report for the current year, use the default selected year (i.e., 2012).

- To run the report for the following year, select the following year (i.e., 2013).

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

6. In the **All Patients or Only Add Ons** dropdown list, select the criteria 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.

7. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

8. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.8.2   GPRA & PART Forecast Patient List by Clinic Name

To run the GPRA & PART Forecast Patient List for selected clinics with appointments during a specified date range, follow these steps.
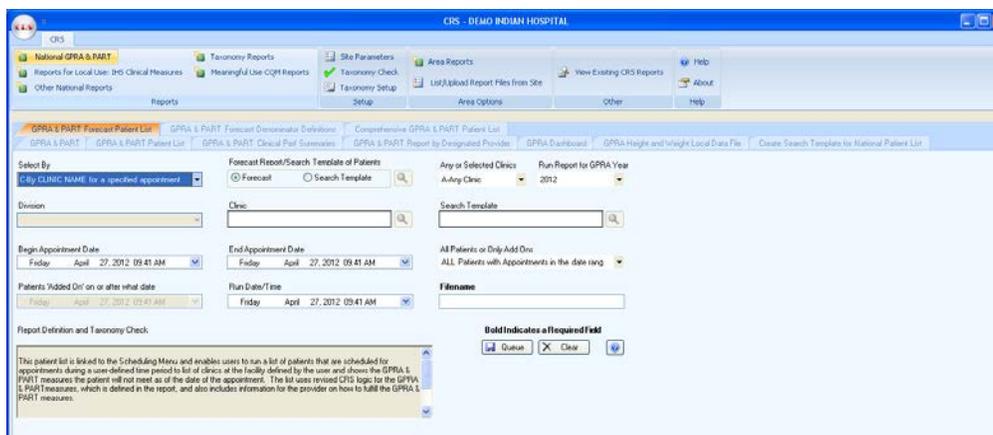
Figure 3-13: Visual CRS **GPRA & PART Forecast Patient List C-By CLINIC NAME** for a specified appointment date range window

1. In the **Select By** dropdown list, select **C-By CLINIC NAME for a specified appointment date range**.

2. Under **Forecast Report/Search Template of Patients** do one of the following:

   - To forecast the report for the GPRA & PART measures, select **Forecast**.

   - To forecast the report and create a search template with the forecast report, select **Search Template** and click the [🔍] button next **Search Template**.

3. To add or overwrite a search template with the selected forecast report, follow the instruction in Add/Overwrite Search Template (Section 6.9)

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

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

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

5. In the **Run Report for GPRA Year** dropdown list, select the criteria to use for the report.

   - To run the report for the current year, use the default selected year (i.e., 2012).

   - To run the report for the following year, select the following year (i.e., 2013).

6. To select one or more clinics, click the [🔍] button next to the **Clinic** box and follow the instructions in Selecting Clinics (Section 6.6). If one clinic has been selected, the clinic name will appear in the **Clinic** box. If multiple clinics have been selected for a report, the words "Multiple Clinics" are displayed in the **Clinic** box. If no clinics have been selected, the **Clinic** box will be empty.

7. In the **Begin Appointment Date** and **End Appointment Date** boxes, 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 box. 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. In the **All Patients or Only Add Ons** dropdown list, select the criteria 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.

9. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

10. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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

To run the GPRA & PART Forecast Patient List for a single selected patient with appointments in a specified date range, follow these steps.
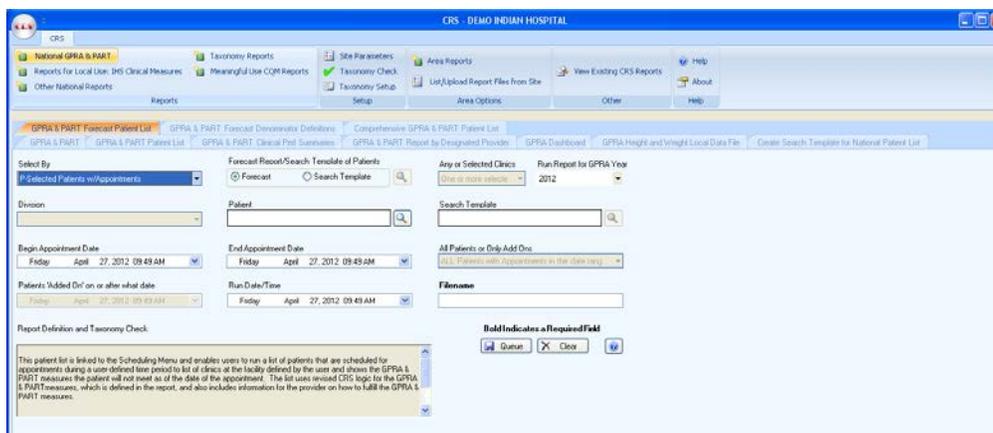
Figure 3-14: Visual CRS **GPRA & PART Forecast Patient List P-Selected Patients w/Appointments** window

1. In the **Select By** dropdown list, select **P-Selected Patients w/Appointments**.

2. Under **Forecast Report/Search Template of Patients** do one of the following:

   - To forecast the report for the GPRA & PART measures, select **Forecast**.

   - To forecast the report and create a search template with the forecast report, select **Search Template** and click the button next **Search Template**.

3. To add or overwrite a search template with the selected forecast report, follow the instruction in Add/Overwrite Search Template (Section 6.9).

4. In the **Run Report for GPRA Year** dropdown list, select the criteria to use for the report.

   - To run the report for the current year, use the default selected year (i.e., 2012).

   - To run the report for the following year, select the following year (i.e., 2013).

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

   - 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** box.

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

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

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

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

   - Double click the patient's name to close the **Select Patient** window.

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

     The patient's name is displayed in the **Patient** box in the report window.

   - To clear the list of names and locate a different patient, click the **Clear** button and repeat steps 4 and 5 above.

7. In the **Begin Appointment Date** and **End Appointment Date** boxes, 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 box. 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. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

9. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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

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

Figure 3-16: Visual CRS **GPRA & PART Forecast Patient List D-One Facility's or Divisions Appointments** window

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

2. Under **Forecast Report/Search Template of Patients** do one of the following:

   • To forecast the report for the GPRA & PART measures, select **Forecast**.

   • To forecast the report and create a search template with the forecast report, select **Search Template** and click the [🔍] button next **Search Template**.

3. To add or overwrite a search template with the selected forecast report, follow the instruction in Add/Overwrite Search Template (Section 6.9).

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

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

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

5. In the **Run Report for GPRA Year** dropdown list, select the criteria to use for the report.

   - To run the report for the current year, use the default selected year (i.e., 2012).

   - To run the report for the following year, select the following year (i.e., 2013).

6. In the **Division** dropdown list, select the division that you would like to report on.

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

7. To select one or more clinics, click the [search icon] button next to the **Clinic** box and follow the instructions in Selecting Clinics (Section 6.6). If one clinic has been selected, the clinic name will appear in the **Clinic** box. If multiple clinics have been selected for a report, the words "Multiple Clinics" are displayed in the **Clinic** box. If no clinics have been selected, the **Clinic** box will be empty.

8. In the **Begin Appointment Date** and **End Appointment Date** boxes, 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 box. 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**.

9. In the **All Patients or Only Add Ons** dropdown list, select the criteria 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.

10. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

11. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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

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

Figure 3-17: Visual CRS **GPRA & PART Forecast Patient A-Any selected set of patients regardless of appt status** window

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

2. Under **Forecast Report/Search Template of Patients** do one of the following:

   • To forecast the report for the GPRA & PART measures, select **Forecast**.

   • To forecast the report and create a search template with the forecast report, select **Search Template** and click the 🔍 button next **Search Template**.

3. To add or overwrite a search template with the selected forecast report, follow the instruction in Add/Overwrite Search Template (Section 6.9).

4. In the **Run Report for GPRA Year** dropdown list, select the criteria to use for the report.

- • To run the report for the current year, use the default selected year (i.e., 2012).

- • To run the report for the following year, select the following year (i.e., 2013).

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

   - • 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** box.

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

   - • Click the 🔍 button next to the **Patient Lookup Options** box. A list of names matching the criteria entered is displayed in the **Patient List** pane.

Figure 3-18: Visual CRS **Select Patient** window

6. To select a patient to report on follow the instructions in Selecting Multiple Patients (Section 6.15).

7. To report on patients included in a search template, click the 🔍 button next to the **Search Template** box and then follow the instructions in Selecting a Search Template (Section 6.10).

8. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

9. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.9   GPRA & PART Forecast Denominator Definitions

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

> **Note:** See Section 5.10 in the *CRS Version 12.1 User Manual* for additional information on the National GPRA & PART Forecast Denominators Definitions.

3.1.9.1   Run the GPRA & PART Forecast Denominators Definitions

1. On the **CRS** ribbon, click the **GPRA & PART** menu in the Reports group.

2. Click the **GPRA & PART Forecast Denominator Definitions** tab to display the **GPRA & PART Forecast Denominator Definitions** window.
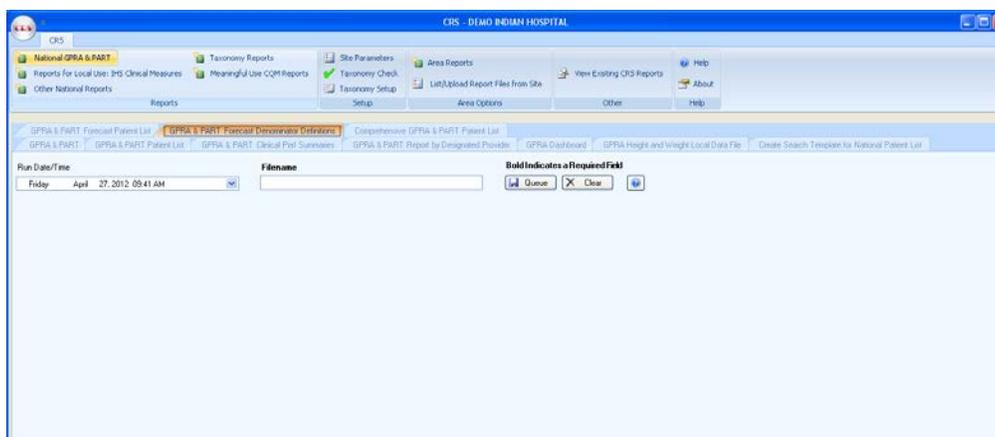
Figure 3-19: Visual CRS **GPRA & PART Forecast Denominator Definitions** window

3. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.1.10   Comprehensive National GPRA & PART Patient List

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

> **Note:** Users must have the BGPZ PATIENT LIST security key to
> run patient lists. The **Comprehensive National GPRA &
> PART Patient List** menu option will not be displayed for
> users without this security key.
>
> See Section 5.11 in the *CRS Version 12.1 User Manual* for
> additional information on the Comprehensive National
> GPRA and PART Patient List.

3.1.10.1 Run the Comprehensive National GPRA & PART Patient List

1. On the **CRS** ribbon, click the **National GPRA & PART** menu in the **Reports**
   group.

2. Click the **Comprehensive GPRA & PART Patient List** tab to display the
   Comprehensive National GPRA & PART Report Patient List window
   containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if
   the message "All taxonomies are present." is displayed then the taxonomies
   required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the
   Setup group to set up and populate the required taxonomies.
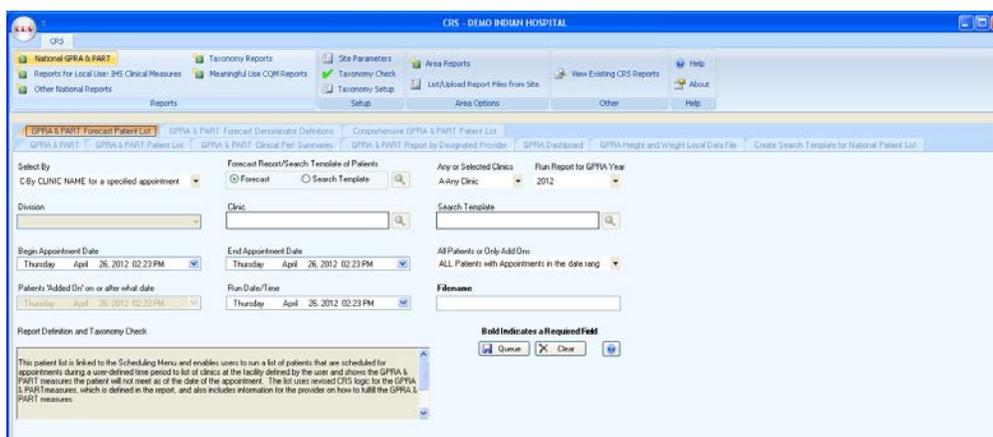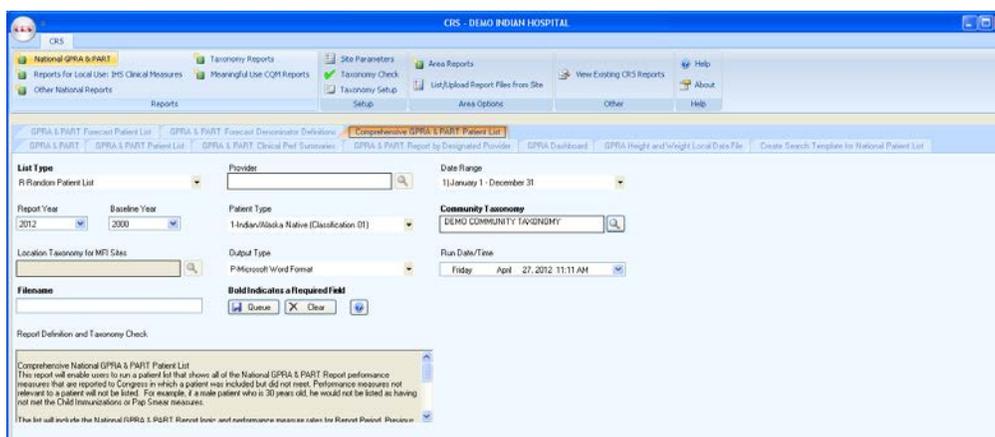

Figure 3-20: Visual CRS **Comprehensive GPRA & PART Patient List** window

4. In the **List Type** dropdown list, select one of the following:

   - **R - Random Patient List**

   - **P - Patient Lists by Provider**

To select a provider, click the next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

- **A - All Patients**

5. To set the **Date Range, Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

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

- **2 - Not Indian Alaskan/Native (Not Classification 01)**

- **3 - All (Both Indian/Alaska Natives and Non-01)**

7. Under **Community Taxonomy**, do one of the following:

- To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 8. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

- To select a different community taxonomy, click the button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

- If your facility is within the Alaska Area and is an MFI site, click the button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

9. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

10. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.2   Reports for Local Use: IHS Clinical Measures

3.2.1   Selected Measures with Community Specified Report

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

> **Note:** See Section 5.12.2.1 in the *CRS Version 12.1 User Manual* for additional information on the Selected Measures with Community Specified Report.

3.2.1.1   Run the Selected Measures with Community Specified Report

1. On the **CRS** ribbon, click the **Reports for Local Use: IHS Clinical Measures** menu in the **Reports** group.

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

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.

Figure 3-21: Visual CRS **Selected Measures w/Community Specified** window

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 button next to the **Type of Measure** box to display the **Selected Measures (User Defined) Measures** window.

  To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

5. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

- To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 7. (Your site's default community taxonomy is defined using the Site Parameters (Section 4.3) option.)

- To select a different community taxonomy, click the button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   If your facility is within the Alaska Area and is an MFI site, click the button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

8. Under **Patient Lists** do one of the following:

- Click **Yes** to generate patient lists with this report, and then click the button next to the **Patient Lists** box to display the **Patient Lists** window.

  To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

- Click **No** to run the report without generating patient lists.

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

9. If you selected **Yes** to patient lists in Step 8, select one of the flowing in the **List Type** dropdown list. Otherwise, skip to Step 10.

- **R - Random Patient List**

- **P - Patient Lists by Provider**

    To select a provider, click the 🔍 next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

- **A - All Patients**

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

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

- **2 - Not Indian Alaskan/Native (Not Classification 01)**

- **3 - All (Both Indian/Alaska Natives and Non-01)**

11. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

12. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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 5.12.2.2 in the *CRS Version 12.1 User Manual* for additional information on the Selected Measures with Patient Panel Population Report.

3.2.2.1   Run the Selected Measures with Patient Panel Population Report

1. On the **CRS** ribbon, click the **Reports for Local Use: IHS Clinical Measures** menu in the **Reports** group.

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

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
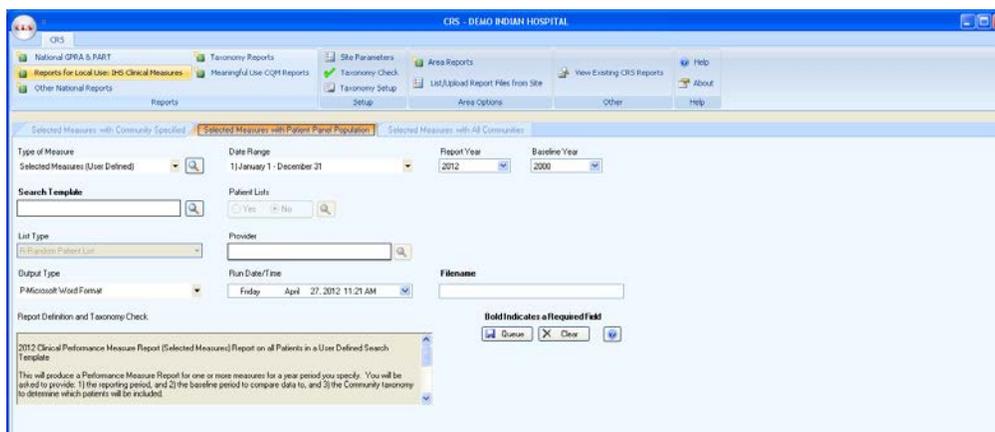
Figure 3-22: Visual CRS **Selected Measures with Patient Panel** window

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 [🔍] button next to the **Type of Measure** box to display the **Selected Measures (User Defined) Measures** window.

     To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

5. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

To select a search template, click the button next to the **Search Template** box to display the **Search Template** window, and then follow the instructions in Selecting a Search Template (Section 6.10).

7. Under **Patient Lists** do one of the following:

- Click **Yes** to generate patient lists with this report, and then click the button next to the **Patient Lists** box to display the **Patient Lists** window.

   To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

- Click **No** to run the report without generating patient lists.

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **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 flowing in the **List Type** dropdown list. Otherwise, skip to Step 9.

- **R - Random Patient List**
- **P - Patient Lists by Provider**

   To select a provider, click the next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

- **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 Selecting Report Output Options (Section 6.17).

10. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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 5.12.2.3 in the *CRS Version 12.1 User Manual*
> for additional information on the Selected Measures with
> All Communities Report.

3.2.3.1   Run the Selected Measures with All Communities Report

1. On the **CRS** ribbon, click the **Reports for Local Use: IHS Clinical Measures** menu in the **Reports** group.

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

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
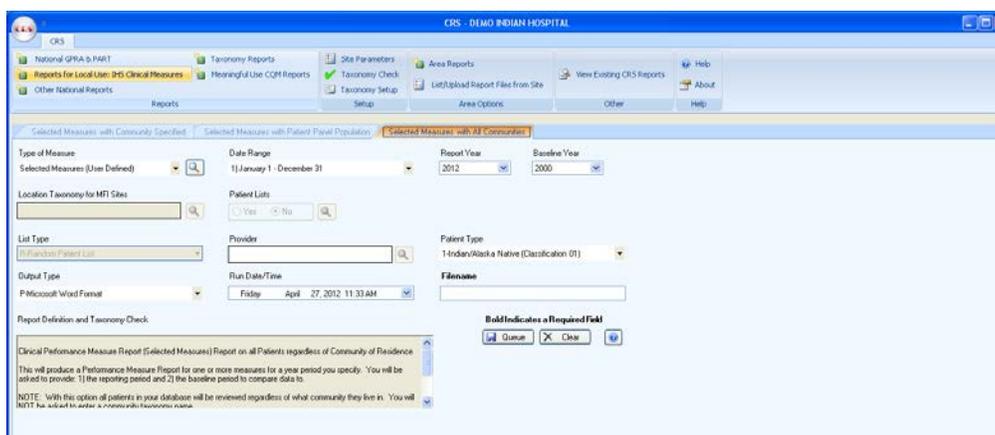
Figure 3-23: Visual CRS **Selected Measures with All Communities** window

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 🔍 button next to the **Type of Measure** box to display the **Selected Measures (User Defined) Measures** window.

  To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

5. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

   If your facility is within the Alaska Area and is an MFI site, click the 🔍 button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy.

7. Under **Patient Lists** do one of the following:

   - Click **Yes** to generate patient lists with this report, and then click the 🔍 button next to the **Patient Lists** box to display the **Patient Lists** window.

     To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

   - Click **No** to run the report without generating patient lists.

   > **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **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 flowing in the **List Type** dropdown list. Otherwise, skip to Step 9.

   - **R - Random Patient List**

   - **P - Patient Lists by Provider**

   To select a provider, click the 🔍 next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

   - **A - All Patients**

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

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

- **2 - Not Indian Alaskan/Native (Not Classification 01)**

- **3 - All (Both Indian/Alaska Natives and Non-01)**

10. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

11. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.3   Other National Reports

3.3.1   GPRA & PART Performance Report

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

> **Note:** See Section 5.13 in the *CRS Version 12.1 User Manual* for additional information on the GPRA & PART Performance Report.

3.3.1.1   Run the GPRA & PART Performance Report

1. On the **CRS** ribbon, click the **Other National Reports** menu in the **Reports** group.

2. Click the **GPRA & PART Performance Report** tab to display the **GPRA & PART Performance Report** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
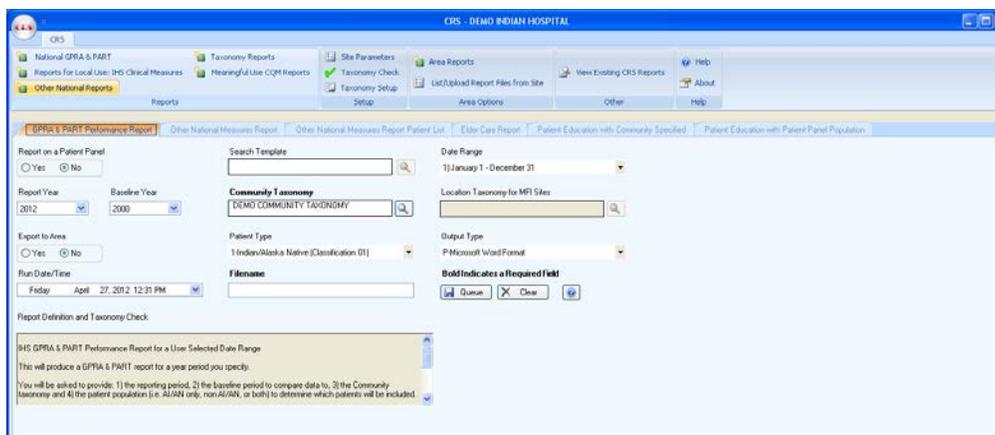
Figure 3-24: Visual CRS **GPRA & PART Performance Report** window

4. In 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** box. If no search template has been selected, the box is empty.

   - To select a search template, click the [🔍] button next to the **Search Template** box to display the **Search Template** window, and then follow the instructions in Selecting a Search Template (Section 6.10).

   - If you select **No**, the report will run without using a patient panel.

5. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

   - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 7. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

   - To select a different community taxonomy, click the [🔍] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   If your facility is within the Alaska Area and is an MFI site, click the [🔍] button next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

- To send final data to your Area Office, click **Yes**.

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

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

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

   - **2 - Not Indian Alaskan/Native (Not Classification 01)**

   - **3 - All (Both Indian/Alaska Natives and Non-01)**

10. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

11. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.3.2   Other National Measures Report

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

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

> **Note:**   See Section 5.14 in the *CRS Version 12.1 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, click the **Other National Reports** menu in the **Reports** group.

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

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.

Figure 3-25: Visual CRS **Other National Measures Report** window

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

- To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in Other National Measures Report: Hard-Coded Report Option (Section 3.3.2.2).

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

5. To view the report, follow the instructions in Viewing a Completed Report (Section 6.18).

3.3.2.2   Other National Measures Report: Hard-Coded Report Option

Use this option to produce Other National Measures Report for the 2012 GPRA year using the performance measure definitions from CRS Version 12.1. The following parameters are predefined for this report:

- A report period of July 1, 2011 through June 30, 2012

- A baseline year of July 1, 1999 through June 30, 2000

- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

To run the Other National Measures Report with hard-coded parameters, follow these steps:
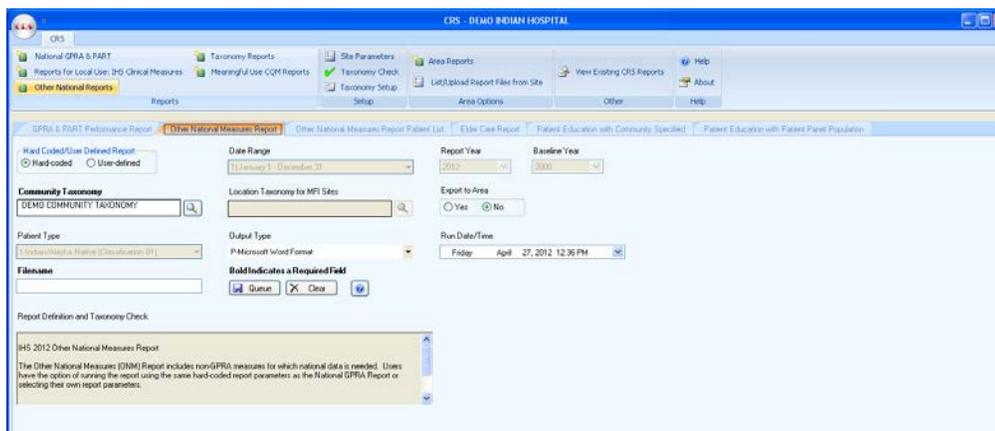
Figure 3-26: Visual CRS **Other National Measures Report** (**Hard-coded Report** option) window

1. Under **Hard-coded/User-defined Report**, select **Hard-coded** (default).

2. Under **Community Taxonomy**, do one of the following:

   - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 3. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

   - To select a different community taxonomy, click the [🔍] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   If your facility is within the Alaska Area and is an MFI site, click the [🔍] button next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   - To send final data to your Area Office, click **Yes**.

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

5. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

6. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.3.2.3 Other National Measures Report: User-Defined Report Option

To run the Other National Measures Report with user-defined parameters, follow these steps:
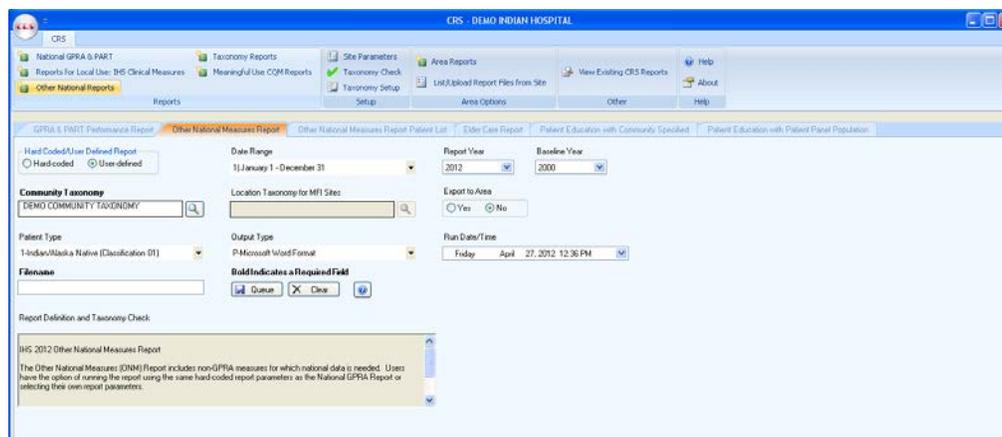
Figure 3-27: Visual CRS **Other National Measures Report** (**User-Defined Report** option) window

1. Under **Hard-coded/User-defined Report**, select **User-defined**.

2. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

3. Under **Community Taxonomy**, do one of the following:

   • To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 4. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

   • To select a different community taxonomy, click the 🔍 button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

   If your facility is within the Alaska Area and is an MFI site, click the 🔍 button next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

- To send final data to your Area Office, click **Yes**.

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

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

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

- **2 - Not Indian Alaskan/Native (Not Classification 01)**

- **3 - All (Both Indian/Alaska Natives and Non-01)**

7. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

8. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.3.3   Other National Measures Report Patient List

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

Note: Users must have the BGPZ PATIENT LIST security key to run patient lists. The **Other National Measures Report Patient List** menu option will not be displayed for users without this security key.
See Section 5.15 in the *CRS Version 12.1 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, click the **Other National Reports** menu in the **Reports** group.

2. Click the **Other National Measures Report Patient List** tab to display the **Other National Measures Report Patient List** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.

Figure 3-28: Visual CRS **Other National Measures Patient List** window

4. To select performance measures and patient lists, click the **Select Measures** button in the top left corner of the report window and follow the instructions in Selecting Measures and Patient Lists (Section 6.12).

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

   - **R - Random Patient List**

   - **P - Patient Lists by Provider**

     To select a provider, click the 🔍 next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7.1).

   - **A - All Patients**

6. To set the **Date Range, Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

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

   - **2 - Not Indian Alaskan/Native (Not Classification 01)**

   - **3 - All (Both Indian/Alaska Natives and Non-01)**

8. Under **Community Taxonomy**, do one of the following:

- To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 9. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

- To select a different community taxonomy, click the [🔍] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

- If your facility is within the Alaska Area and is an MFI site, click the [🔍] button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

10. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

11. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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 5.16 in the *CRS Version 12.1 User Manual* for additional information on the Elder Care Report.

3.3.4.1   Run the Elder Care Report

1. On the **CRS** ribbon, click the **Other National Reports** menu in the **Reports** group.

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

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3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
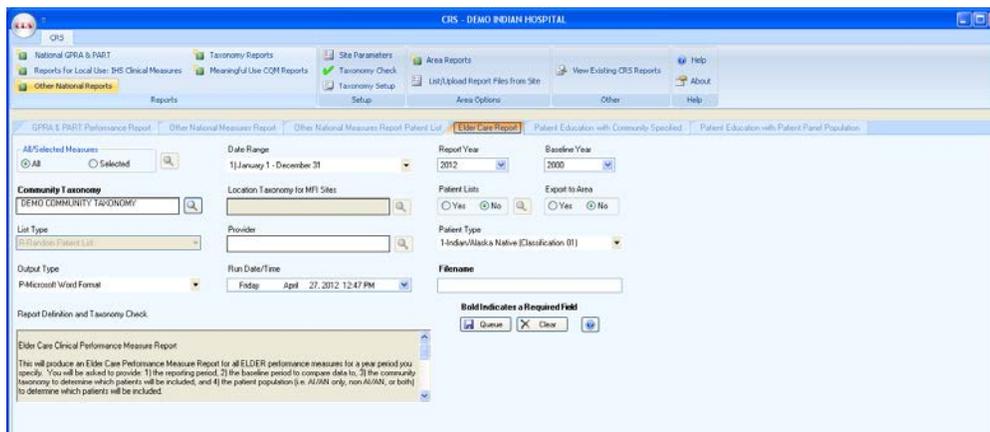

Figure 3-29: Visual CRS **Elder Care Report** window

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

   - To run this report on all performance measures, select **All**.

   - To select specific performance measures for this report, select **Selected**, and then click the [🔍] button next to the **All/Selected Measures** box to display the **Elder Care Measures** window.

     To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

5. To set the **Date Range, Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

   - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 7. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

   - To select a different community taxonomy, click the [🔍] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

    - If your facility is within the Alaska Area and is an MFI site, click the [🔍] button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

8. Under **Patient Lists** do one of the following:

    - Click **Yes** to generate patient lists with this report, and then click the [🔍] button next to the **Patient Lists** box to display the **Elder Care Patient Lists** window.

      To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

    - Click **No** to run the report without generating patient lists.

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

9. Under **Export to Area**, do one of the following:

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

10. If you selected **Yes** to patient lists in Step 8, select one of the flowing in the **List Type** dropdown list. Otherwise, skip to Step 11.

    - **R - Random Patient List**
    - **P - Patient Lists by Provider**

    To select a provider, click the [🔍] next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

    - **A - All Patients**

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

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

12. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

13. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.3.5   Patient Education Reports

3.3.5.1   Patient Education w/Community Specified

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

> **Note:** See Section 5.17 in the *CRS Version 12.1 User Manual* for additional information on the Patient Education w/Community Specified report.

Run the Patient Education with Community Specified report

1. On the **CRS** ribbon, click the **Other National Reports** menu in the **Reports** group.

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

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
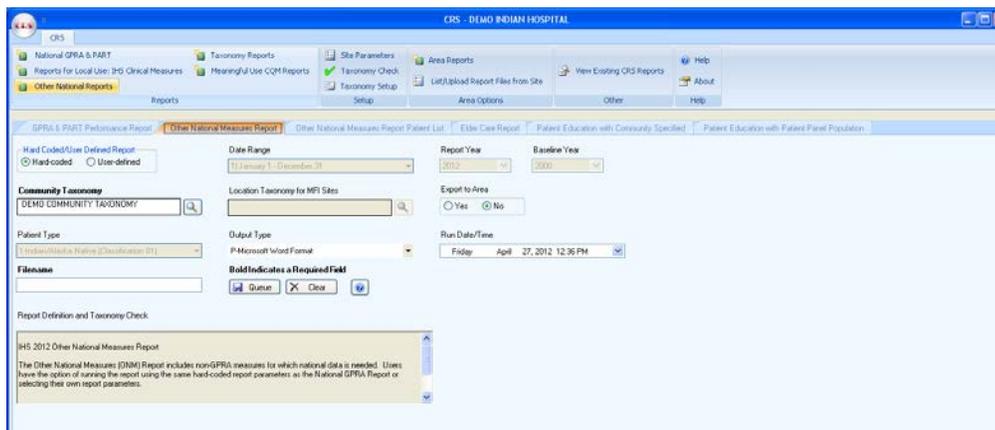
Figure 3-30: Visual CRS **Patient Education with Community Specified** window

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

    - To run this report on all performance measures, select **All**.

    - To select specific performance measures for this report, select **Selected**, and then click the [🔍] button next to the **All/Selected Measures** box to display the **Patient Education Measures** window.

      To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

5. To set the **Date Range, Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

    - To use the default community taxonomy displayed in the **Community Taxonomy** box, skip to Step 7. (Your site's default community taxonomy is defined using the **Site Parameters** (Section 4.3) option.)

    - To select a different community taxonomy, click the [🔍] button next to the **Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

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

    - If your facility is within the Alaska Area and is an MFI site, click the [🔍] button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

8. Under **Patient Lists** do one of the following:

- Click **Yes** to generate patient lists with this report, and then click the button next to the **Patient Lists** box to display the **Patient Education Patient Lists** window.

  To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

- Click **No** to run the report without generating patient lists.

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

9. Under **Export to Area**, do one of the following:

- To send final data to your Area Office, click **Yes**.

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

10. If you selected **Yes** to patient lists in Step 8, select one of the following in the **List Type** dropdown list. Otherwise, skip to Step 11.

- **R - Random Patient List**

- **P - Patient Lists by Provider**

  To select a provider, click the next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

- **A - All Patients**

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

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

- **2 - Not Indian Alaskan/Native (Not Classification 01)**

- **3 - All (Both Indian/Alaska Natives and Non-01)**

12. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

13. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.3.5.2   Patient Education w/Patient Panel Population

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

> **Note:**   See Section 5.18 in the *CRS Version 12.1 User Manual* for additional information on the Patient Education w/Patient Panel Population report.

Run the Patient Education with Patient Panel Population report

1. On the **CRS** ribbon, click the **Other National Reports** menu in the **Reports** group.

2. Click the **Patient Education with Patient Panel Population** tab to display the **Patient Education with Patient Panel Population Report** window containing information about the report and the results of the taxonomy check.

3. Scroll to the bottom of the **Report Definition and Taxonomy Check** window, if the message "All taxonomies are present." is displayed then the taxonomies required for all National GPRA & PART 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 & PART reports. Click the **Taxonomy Setup** (Section 4.2) option in the **Setup** group to set up and populate the required taxonomies.
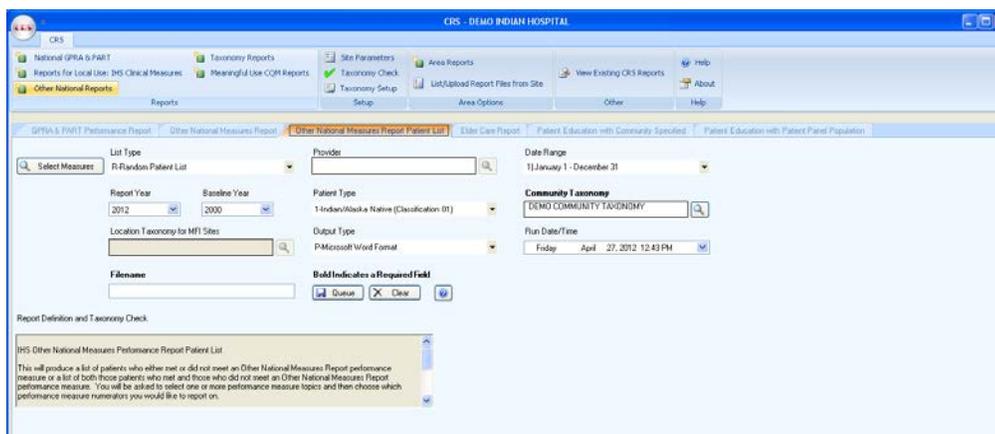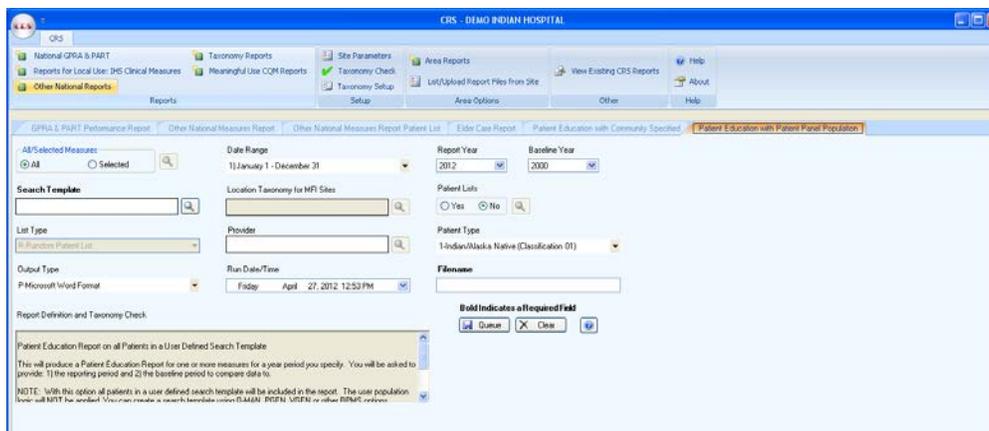

Figure 3-31: Visual CRS **Patient Education with Patient Panel** window

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

- To run this report on all performance measures, select **All**.

- To select specific performance measures for this report, select **Selected**, and then click the ![search] button next to the **All/Selected Measures** box to display the **Patient Education Measures** window.

To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

5. To set the **Date Range, Report Year** or **Report End**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

   To select a search template, click the button next to the **Search Template** box to display the **Search Template** window, and then follow the instructions in Selecting a Search Template (Section 6.10).

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

   - If your facility is within the Alaska Area and is an MFI site, click the button next to the Location Taxonomy for MFI Sites box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

8. Under **Patient Lists** do one of the following:

   - Click **Yes** to generate patient lists with this report, and then click the button next to the **Patient Lists** box to display the **Patient Education Patient Lists** window.

     To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

   - Click **No** to run the report without generating patient lists.

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

   -

9. If you selected **Yes** to patient lists in Step 8, select one of the flowing in the **List Type** dropdown list. Otherwise, skip to Step 10.

   - **R - Random Patient List**

   - **P - Patient Lists by Provider**

     To select a provider, click the next to the **Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

- **A - All Patients**

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

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

    - **2 - Not Indian Alaskan/Native (Not Classification 01)**

    - **3 - All (Both Indian/Alaska Natives and Non-01)**

11. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

12. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.4   Taxonomy Reports

3.4.1   Lab Taxonomy Reports

Lab taxonomy reports are available for the following CRS reports:

- National GPRA & PART Report and the GPRA & PART Performance Report

- Other National Measures Report

- Selected Measures Reports

- Elder Care Report

    > **Note:** See Section 5.19 in the *CRS Version 12.1 User Manual* for additional information on the lab taxonomy reports.

3.4.1.1 **Run a Lab Taxonomy Report**

1. On the **CRS** ribbon, click the **Taxonomy Reports** menu in the **Reports** group.

2. Click the **Lab Taxonomies** tab to display the **Lab Taxonomies Report** window containing information about the report and the results of the taxonomy check.
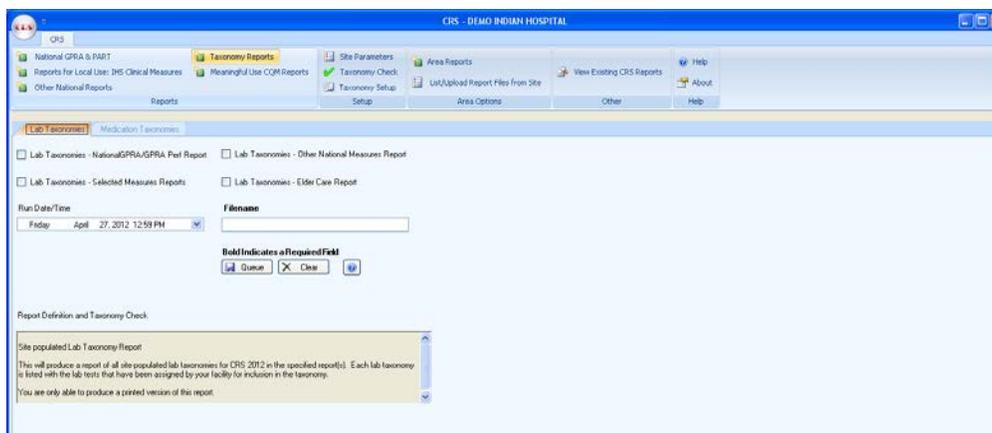
Figure 3-32: Visual CRS **Lab Taxonomy Report** window

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 Selecting Report Output Options (Section 6.17).

5. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.4.2   Medication Taxonomy Reports

Medication taxonomy reports are available for the following CRS reports:

*   National GPRA & PART Report and the GPRA & PART Performance Report

*   Other National Measures Report

*   Selected Measures Reports

*   Elder Care Report

> Note: See Section 5.20 in the *CRS Version 12.1 User Manual* for additional information on the medication taxonomy reports.

3.4.2.1   Run a Medication Taxonomy Report

1. On the **CRS** ribbon, click the **Taxonomy Reports** menu in the **Reports** group.

2. Click the **Medication Taxonomies** tab to display the **Medication Taxonomies Report** window containing information about the report and the results of the taxonomy check.
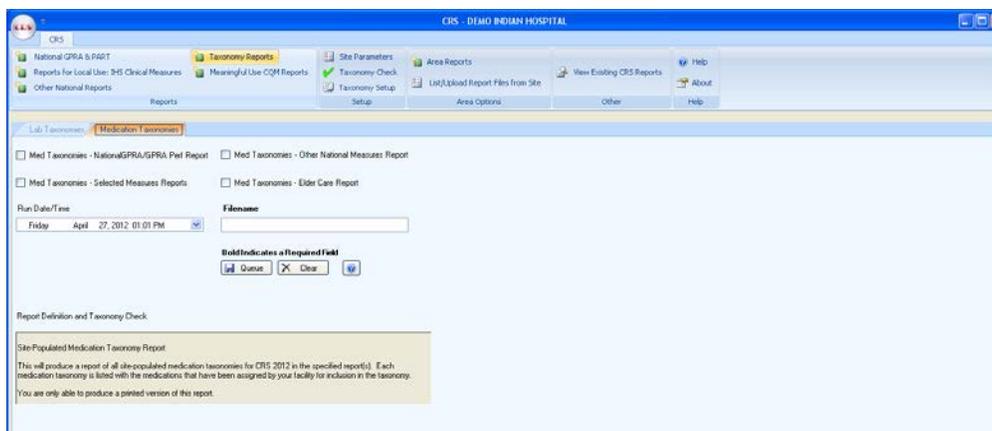
Figure 3-33: Visual CRS **Med Taxonomy Report** window

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 Selecting Report Output Options (Section 6.17).

5. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.5   Meaningful Use CQM Reports

3.5.1   EP Clinical Quality Measures Report Stage 1

Use this option to produce a report on the Stage 1 Meaningful Use (MU) Eligible Professional (EP) Report for clinical quality measures, which summarizes national data that is required to demonstrate that the Electronic Health Record (EHR) is being used accurately and appropriately by eligible clinical professionals.

> **Note:**   See Section 5.21 in the *CRS Version 12.1 User Manual* for additional information on the Meaningful Use EP Clinical Quality Measures Report Stage 1 report.

Run the EP Clinical Quality Measures Report Stage 1 report

1. On the **CRS** ribbon, click the **Meaningful Use CQM Reports** menu in the **Reports** group.

2. Click the **EP Clinical Quality Measures Report Stage 1** tab to display the **EP Clinical Quality Measures Report Stage 1 Report** window containing information about the report and the report definition.
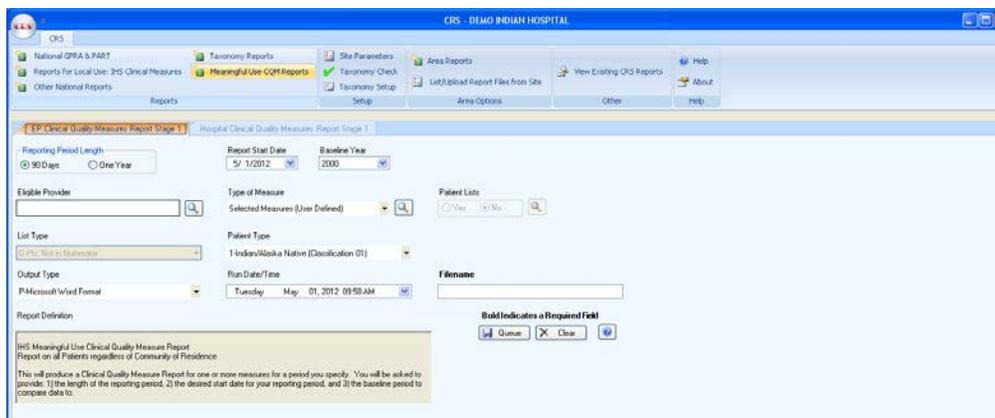
Figure 3-34: Visual CRS **EP Clinical Quality Measures Report Stage 1** window

3. Under **Reporting Period Length**, do one of the following:

   • To run this report for a reporting period of 90 days, select **90 Days**.

   • To run this report for a reporting period of one year, select **One Year**.

4. To set the **Report Start Date** and **Base Line Year** options, follow the instructions in **Selecting Report Dates** (Section 6.16).

5. To select an eligible provider for the report, click the 🔍 button next to the **Eligible Provider** box and follow the instructions in Selecting a Provider (Section 6.7).

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

   • Select one of the predefined sets of performance measures:

     – **Core Measures**
     – **Alternate Core Measures**

   • Select **Menu Set Measures** and then click the 🔍 button next to the **Type of Measure** box to display the **Menu Set Measures Measures** window.

     To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

   • Select **Selected Measures (User Defined)**, and then click the 🔍 button next to the **Type of Measure** box to display the **Selected Measures (User Defined) Measures** window.

To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

7. Under **Patient Lists** do one of the following:

- Click **Yes** to generate patient lists with this report, and then click the button next to the **Patient Lists** box to display the **Patient Lists** window.

  To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

- Click **No** to run the report without generating patient lists.

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **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** dropdown list. Otherwise, skip to Step 9.

- **D-Pts. Not in Numerator**
- **N-Pts in Numerator**
- **A-All Patients**

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

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

10. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

11. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

3.5.2   Hospital Clinical Quality Measures Report Stage 1

Use this option to produce a report on the Stage 1 Meaningful Use (MU) Eligible Hospital (EH) and Critical Access Hospital (CAH) Report for clinical quality measures, which summarizes national data that is required to demonstrate that the Electronic Health Record (EHR) is being used accurately and appropriately by eligible hospitals.

> **Note:** See Section 5.22 in the *CRS Version 12.1 User Manual* for additional information on the Meaningful Use Hospital Clinical Quality Measures Report Stage 1 report.

Run the Hospital Clinical Quality Measures Report Stage 1 report

1. On the **CRS** ribbon, click the **Meaningful Use CQM Reports** menu in the **Reports** group.

2. Click the **Hospital Clinical Quality Measures Report Stage 1** tab to display the **Hospital Clinical Quality Measures Report Stage 1 Report** window containing information about the report and the report definition.

Figure 3-35: Visual CRS **Hospital Clinical Quality Measures Report Stage 1** window

3. Under **Reporting Period Length**, do one of the following:

   - To run this report for a reporting period of 90 days, select **90 Days**.

   - To run this report for a reporting period of one year, select **One Year**.

4. To set the **Report Start Date** and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

   - Select one of the predefined sets of performance measures:

     – All Hospital Measures

- Select **Selected Measures (User Defined)**, and then click the 🔍 button next to the **Type of Measure** box to display the **Selected Measures (User Defined) Measures** window.

   To select measures to report on, follow the instructions in Selecting Performance Measures (Section 6.13).

6. Under **Patient Lists** do one of the following:

- Click **Yes** to generate patient lists with this report, and then click the 🔍 button next to the **Patient Lists** box to display the **Patient Lists** window.

   To select patient list measures, follow the instructions in Selecting Patient Lists (Section 6.14).

- Click **No** to run the report without generating patient lists.

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

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

- **D-Pts. Not in Numerator**
- **N-Pts in Numerator**
- **A-All Patients**

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

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

9. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

10. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

4.0   Setting Up Visual CRS

4.1   Taxonomy Check

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 12.1 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 4.4 in the *CRS Version 12.1 User Manual* for additional information on the Taxonomy Check options.

4.1.1   Check the Taxonomies for a Report

1. On the **CRS** ribbon, click the **Taxonomy Check** menu in the **Reports** group.

2. Click the **Taxonomy Checks** tab to display the **Taxonomy Checks Report** window containing information about the report and the results of the taxonomy check.
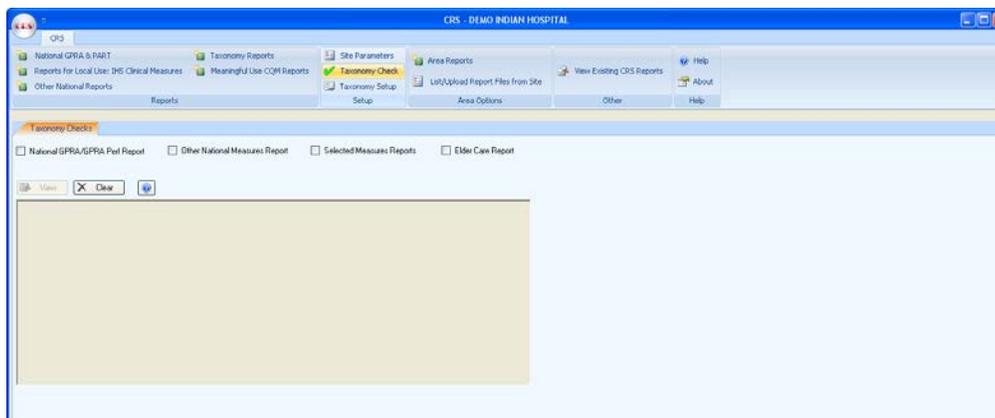

Figure 4-1: Visual CRS **Taxonomy Check** window

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

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

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** (Section 4.2) option to add the missing taxonomies before running the report.

Note: See Section 4.5 in the *CRS Version 12.1 User Manual* for additional information on setting up taxonomies.

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

4.2   Taxonomy Setup

Before running a report, the taxonomies required for the report must be set up and populated in Visual CRS. 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 12.0 2012.
Users must have the BGPZ TAXONOMY EDIT security key to edit lab and medication taxonomies used by CRS. Users without this security key can view the items included in taxonomies, but cannot edit them.
See Section 4.5 in the *CRS Version 12.1 User Manual* for additional information on setting up taxonomies.

4.2.1   Set Up Taxonomies

1. On the **CRS** ribbon, click the **Taxonomy Setup** menu in the Reports group.

2. Click the **Taxonomy Setup** tab to display the **Taxonomy Setup** window.
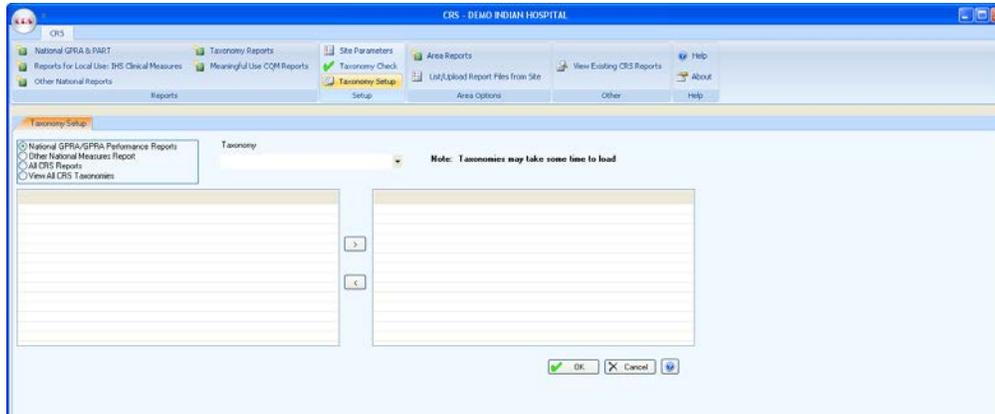
Figure 4-2: Visual CRS **Taxonomy Setup** window

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 dropdown menu arrow in the **Taxonomy** box 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.

The example below 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).
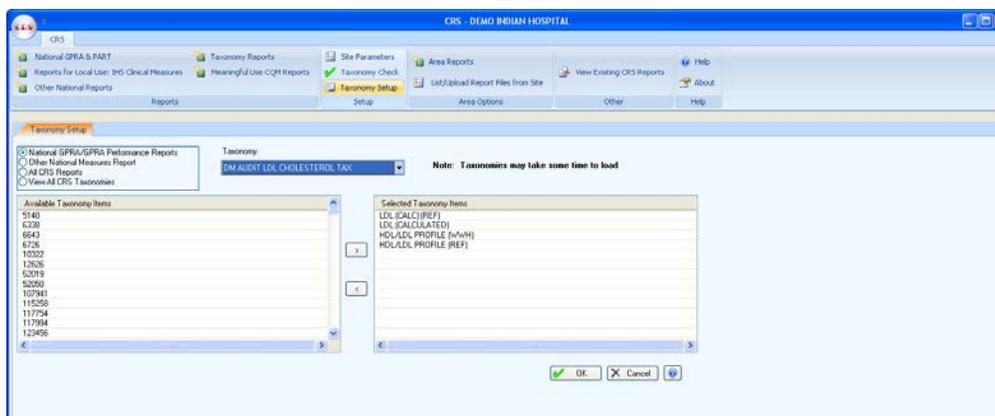
Figure 4-3: Visual CRS **Add/Edit Taxonomy** window

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 [>] 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 [>] 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 [<] 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 [<] 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**.

4.2.1.1   View Existing Taxonomies

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

1. On the **CRS** ribbon, click the **Taxonomy Setup** menu in the **Reports** group.

2. Click the **Taxonomy Setup** tab to display the **Taxonomy Setup** window.
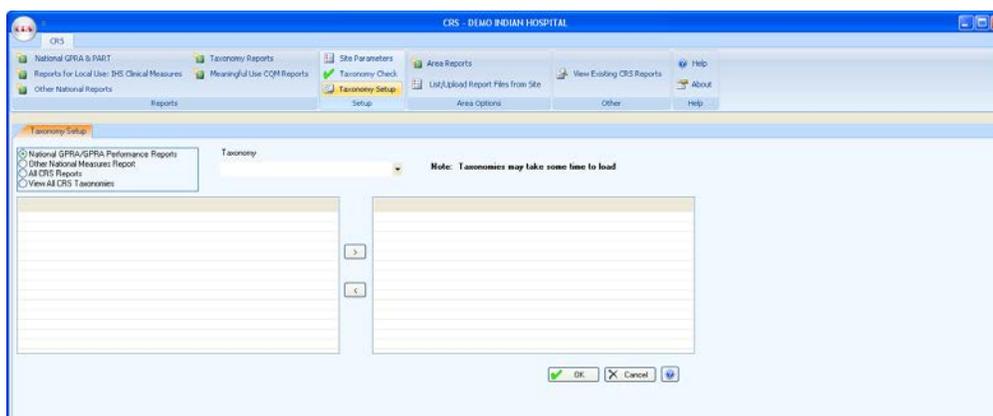
Figure 4-4: Visual CRS **Taxonomy Setup** window

3. Check the **View All CRS Taxonomies** option.

4. Click the dropdown menu arrow in the **Taxonomy** box 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.

The example below shows the read-only view of the BGP PQA CONTROLLER MEDS taxonomy.
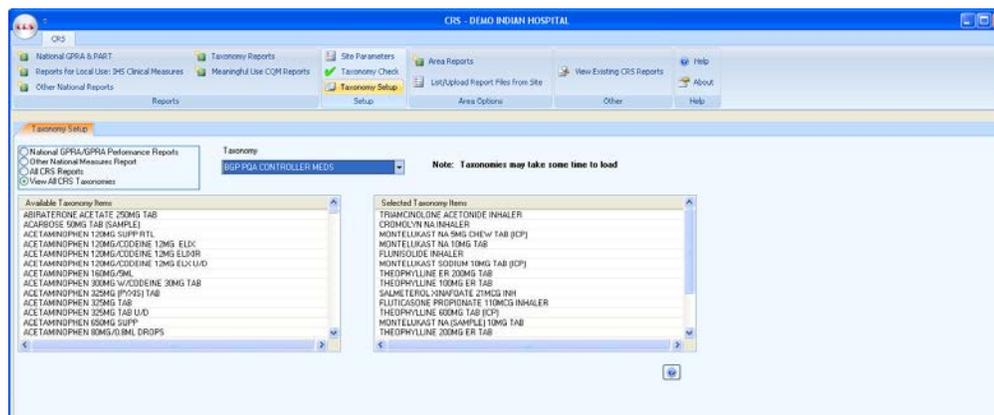
Figure 4-5: Visual CRS **View Taxonomy** read-only window

4.3   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

- Whether the site is a MFI site

- Whether the site is a CHS-only site

- Whether the site is a Urban Program Outreach Referral Clinic

- Whether to export height and weight data to the site's Area Office by default

- 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** box at the top of the **Site Parameter**s window. Users at sites with multidivisional databases can set or edit site parameters for other sites in the same database.

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

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

- Select the location to set site parameters (Section 4.3.1)

- Set site parameters (Section 4.3.2)

> **Note:** See Section 4.2 in the *CRS Version 12.1 User Manual* for additional information on each of the site parameters set using this option.

4.3.1   Select the Location to Set Site Parameters

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

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

> **Note:** CRS runs reports for the location that you selected when you logged in to the CRS GUI. Selecting a different location in the **Site Parameters** window only affects the site whose parameters you are editing; it does not change the location that you are logged in to.
>
> To change the location that you run reports for, click **Change Division** from the **Menu** (Section 2.1) button at the top of the **Visual CRS** window to display the **Change Division** window, and then select the new location.
>
> For example, if your multi-divisional database contains data for Facilities A, B, and C and you are logged in to Facility A, you can edit the site parameters for Facilities B and C by selecting them in the **Location** box. However, your CRS reports would still be run for Facility A.
>
> To run reports for a different facility, click **Change Division** and select the new facility as described above.

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

1. On the **CRS** ribbon, click the **Site Parameters** menu in the **Reports** group.

2. Click the **Site Parameters** tab to display the **Site Parameters** window.
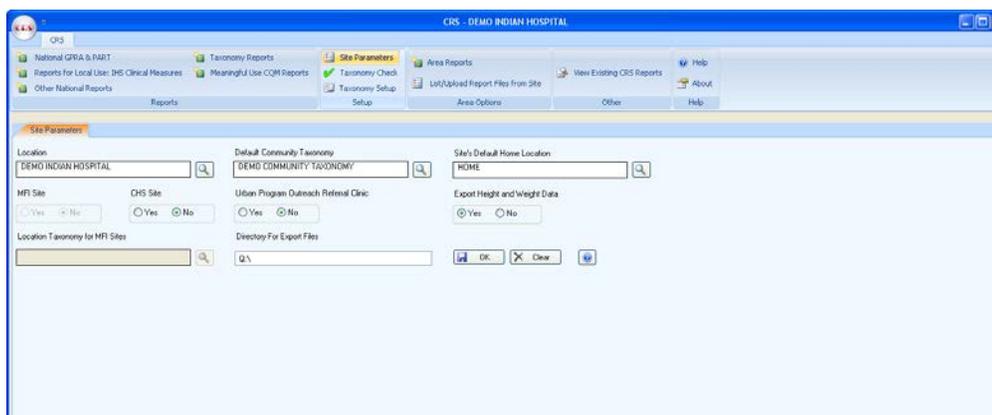
Figure 4-6: Visual CRS **Site Parameters** window

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

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

- *To set or change site parameters for the location you are currently logged in to*, no changes to the **Location** box are required. Continue with the instructions for setting site parameters (Section 4.3.2) below.

- *To view or edit site parameters for another site* (one in the same multi-divisional database) that has already been set up in CRS, click the [🔍] next to the **Location** box to display the **Edit Site Parameters** message and do one of the following:
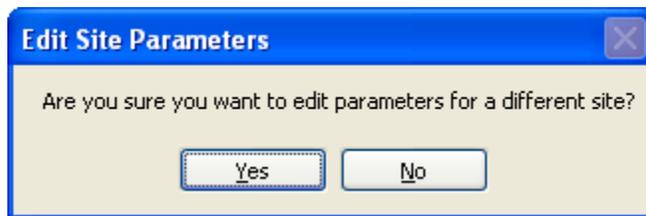
Figure 4-7: Visual CRS **Edit Site Parameters** message

– Click **Yes** (edit site parameters for a different location) to display the **Location** window and then follow the instructions in Selecting a Location (Section 6.5). After you select a location, continue with the instructions for setting site parameters (Section 4.3.2) below.

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

– Click **No** to return to the **Site Parameters** window and continue with the instructions for setting site parameters (Section 4.3.2) below.

4.3.2   Set Site Parameters

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

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

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

   - To remove a taxonomy displayed in the **Default Community Taxonomy** box, right click the default community taxonomy in the **Default Community Taxonomy** box and select **Clear**.

   - To set or change the default community taxonomy that will be used for CRS reports, click the [🔍] next to the **Default Community Taxonomy** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

> **Note:** If your 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 12.1 User Manual* for information about this site parameter.

2. If no location has been selected for your site's default home location, the **Site's Default Home Location** box in the **Site Parameters** window is empty. If a location has been selected, it is displayed in the **Site's Default Home Location** box.

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

   - To remove a taxonomy displayed in the **Site's Home Location** box, right click the default home location in the **Site's Home Location** box and select **Clear**

   - To set or change the site's default home location that will be used to report Public Health Nursing home visits by your installation of CRS, click the next to the **Site's Default Home Location** box and follow the instructions in Selecting a Location (Section 6.5).

   > **Note:** See Section 4.2 in the *CRS Version 12.1 User Manual* for information about this site parameter.

3. If your facility is *not* within the Alaska Area, the **MFI Site** parameter and the **Location Taxonomy for MFI Sites** box are inactive and no action is required.

   If your facility is within the Alaska Area do one of the following under the **MFI Site** parameter:

   - If the site is an MFI site, click **Yes** and then click the next to the **Location Taxonomy for MFI Sites** box and follow the instructions in Selecting a Community Taxonomy (Section 6.4).

   - If the site is not an MFI site, click **No**.

4. Under **CHS Site**, do one of the following:

   - If your site offers *only* CHS services to its patients, select **Yes**.

   - If your site offers *any* direct services, select **No**.

   > **Note:** See Section 4.2 in the *CRS Version 12.1 User Manual* for information about this site parameter.

5. Under **Export Height and Weight Data**, do one of the following:

- If this site is not a Tribal facility, this option must be set to **Yes**.

- If this site is a Tribal facility that does not want to export height and weight data to your Area Office and IHS Division of Epidemiology, select **No**.

> **Note:** See Section 4.2 in the *CRS Version 12.1 User Manual* for information about this site parameter.

6. Under Directory For Export Files, enter the default directory location where the site's export files are to be created.

> **Note:** Be sure to check with your 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 in the *CRS Version 12.1 User Manual* for information about this site parameter.

7. To save your settings, click **OK** and click **OK** on the **Saved** pop-up message.
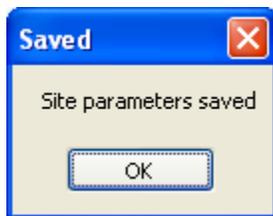
Figure 4-8: Visual CRS **Saved** pop-up message window

8. To cancel any changes *not* saved and reset the site parameters to its original setting, 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 12.1 User Manual* for additional information on the uploading report files.
>
> See About CRS File Names (Section 5.1.2) at the end of this topic for information about report file names and extensions.

5.1.1   List and Upload Report Files

1. On the **CRS** ribbon, click the **List/Upload Report Files from Site** menu in the **Area Options** group.

2. Click the **List/Upload Report Files from Site** tab to display the **List/Upload Report Files from Site** window.
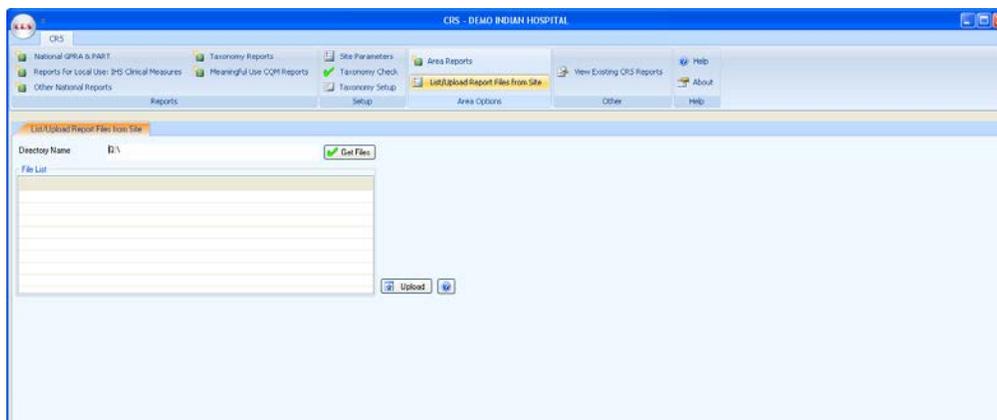
Figure 5-1: Visual CRS **List/Upload Report Files from Site** window

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

> **Note:** Only FileMan data files created by CRS Version 12.1 will be listed in the File List pane.

4. Click the check box next to each file that you want to upload to CRS.
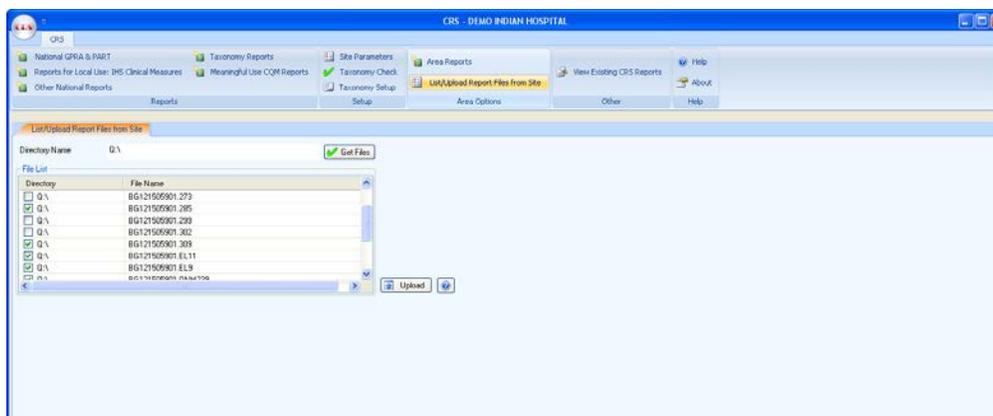
Figure 5-2: Visual CRS **Upload Files** window with files checked to upload

5. To upload the selected files, click the **Upload** button next to the File List box.

6. When files have been successfully uploaded, the **Success** message box with the words "Checked files have been uploaded successfully" will be displayed.
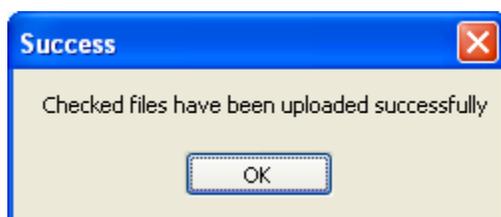
Figure 5-3: Visual CRS files upload **Success** message box

7. Click **OK** on the **Success** message box to return to the **List/Upload Report Files from Site** window.

5.1.2   About CRS File Names

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

Each file name begins with "BG12" 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 & PART Performance Reports are treated the same way as National GPRA & PART Reports and will be displayed with them if they have a report period of July 1, 2011 through June 30, 2012, a baseline year of 2000, and a population of AI/AN only. These reports have only numbers in the file name extension (e.g., BG12505901.121).

5.2 Area National GPRA & PART Report

Use this option to produce an Area aggregate GPRA & PART 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 12.1 User Manual* for additional information on the Area National GPRA & PART Report.

5.2.1 Run the Area National GPRA & PART Report

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area National GPRA_PART Report-Includes GPRA Dev** tab to display the **Area National GPRA & PART Report** window.
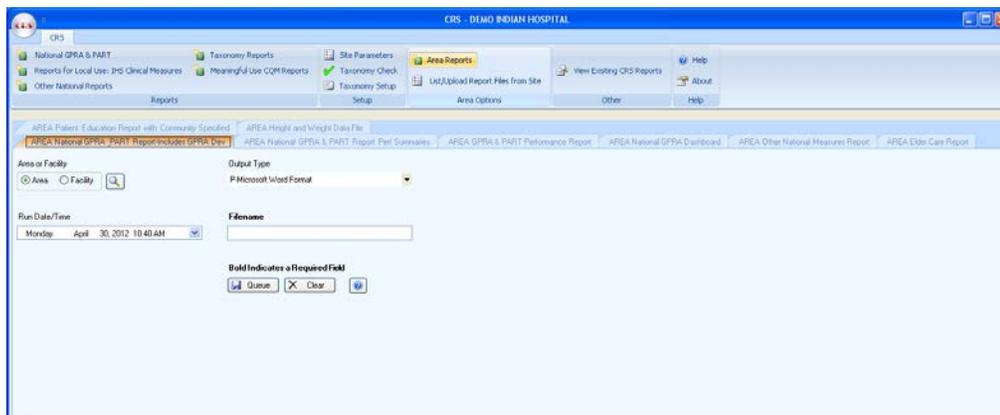
Figure 5-4: Visual CRS **Area National GPRA & PART Report-Includes GPRA Dev** window

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

   - To run a report that combines data from all sites within the Area, select **Area**, and then click the [🔍] next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

- To run a report on one or more specific facilities select **Facility**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

4. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

5. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

5.3   Area National GPRA & PART Report Perf 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 12.1 User Manual* for additional information on the Area National GPRA & PART Report Performance Summaries.

5.3.1   Run the Area National GPRA & PART Report Perf Summaries

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area National GPRA & PART Report Perf Summaries** tab to display the **Area National GPRA & PART Report Perf Summaries** window.
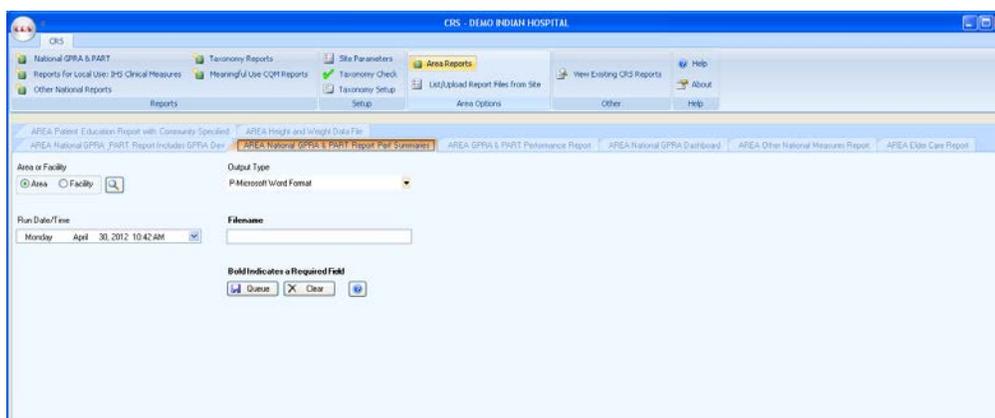
Figure 5-5: Visual CRS **Area National GPRA & PART Report Perf Summaries** window

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

- To run a report that combines data from all sites within the Area, select **Area**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

- To run a report on one or more specific facilities select **Facility**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

4. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

5. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

5.4   Area GPRA & PART Performance Report

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

> **Note:** See Section 6.2.3 in the *CRS Version 12.1 User Manual* for additional information on the Area GPRA & PART Performance Report.

5.4.1   Run the Area GPRA & PART Performance Report

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area National GPRA & PART Performance Report** tab to display the **Area National GPRA & PART Performance Report** window.
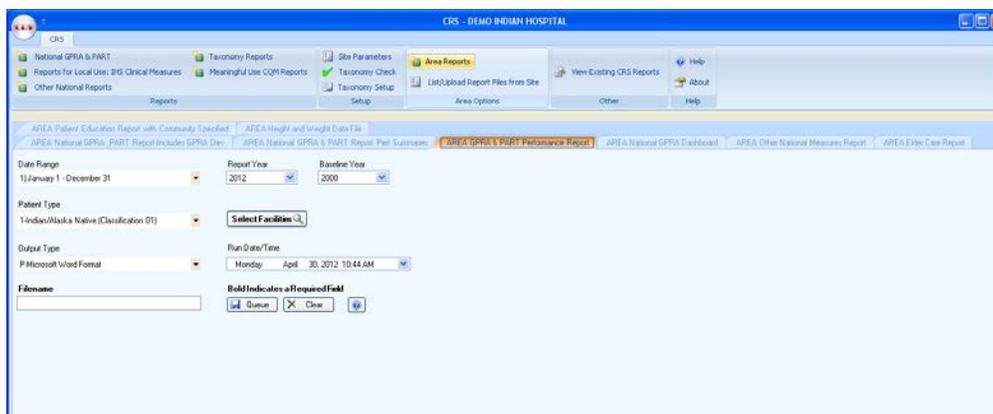
Figure 5-6: Visual CRS **Area GPRA Performance Report** window

3. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

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

   - **2 - Not Indian Alaskan/Native (Not Classification 01)**

   - **3 - All (Both Indian/Alaska Natives and Non-01)**

5. To select the facilities to include in the report, click the **Select Facilities** to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

6. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

7. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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 12.1 User Manual* for
> additional information on the Area National GPRA
> Dashboard.

5.5.1   Run the Area National GPRA Dashboard

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area National GPRA Dashboard** tab to display the **Area National GPRA Dashboard Report** window.
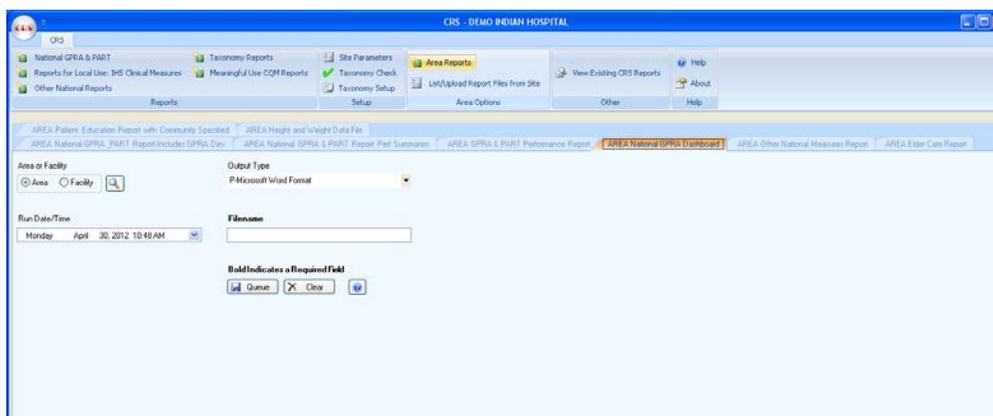
Figure 5-7: Visual CRS **Area National GPRA Dashboard** window

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

   - To run a report that combines data from all sites within the Area, select **Area**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

   - To run a report on one or more specific facilities select **Facility**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

4. To select the report output type and change the time and date for the report to run, follow the instructions in **Selecting Report Output Options** (Section 6.17).

5. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

5.6 Area Other National Measures Report

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

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

> **Note:** See Section 6.2.5 in the *CRS Version 12.1 User Manual* for additional information on the Area Other National Measures Report.

5.6.1 Run the Area Other National Measures Report

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area Other National Measures Report** tab to display the **Area Other National Measures Report** window.
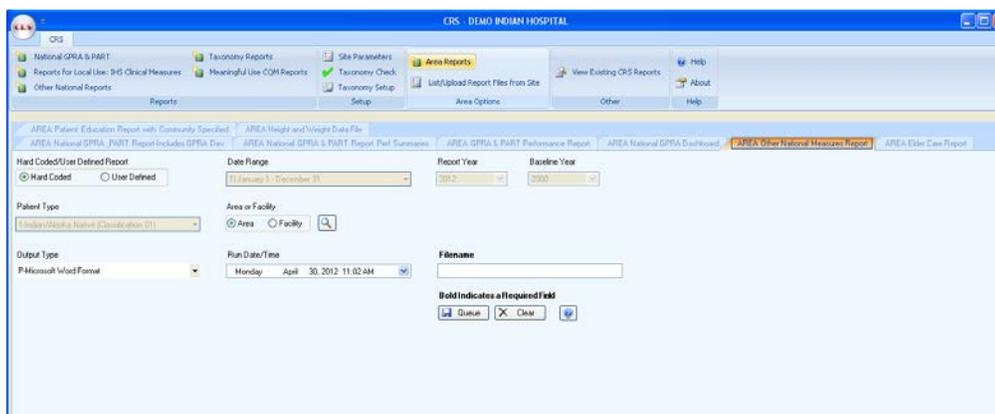
Figure 5-8: Visual CRS **Area Other National Measures Report** window

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

   - To run the report using hard-coded report parameters, select **Hard-coded** and follow the instructions in Area Other National Measures Report: Hard-Coded Report Option (Section 5.6.2).

   - To run the report using custom, user-defined parameters, select **User-defined** and follow the instructions in Area Other National Measures Report: User-Defined Report Option (Section 5.6.3).

4. To view the report, follow the instructions in Viewing a Completed Report (Section 6.18).

5.6.2   Area Other National Measures Report: Hard-Coded Option

Use this option to produce an aggregate Area Other National Measures Report for the 2012 GPRA year using the performance measure definitions from CRS Version 12.1. The following parameters are predefined for this report:

- A report period of July 1, 2011 through June 30, 2012

- A baseline year of July 1, 1999 through June 30, 2000

- A beneficiary population of AI/AN only (defined as Beneficiary 01 in the Patient Registration file)

To run the Area Other National Measures Report with hard-coded parameters, follow these steps:
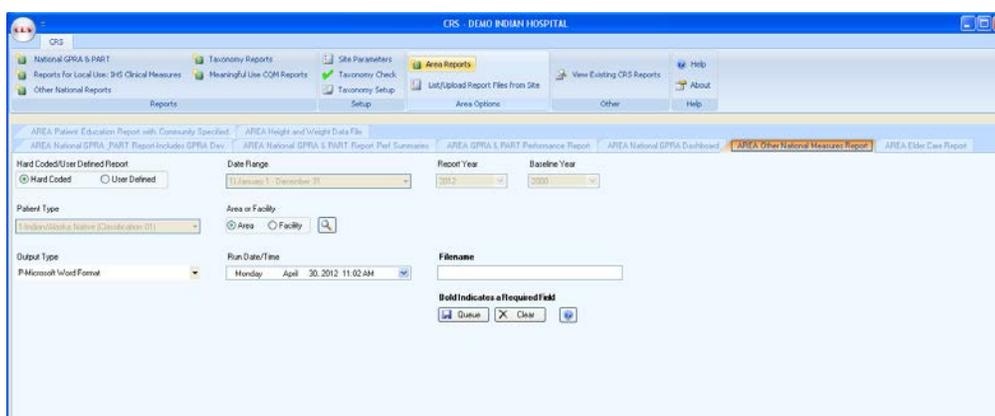
Figure 5-9: Visual CRS **Area Other National Measures Report** window (**Hard-coded Report** option)

1. Under **Hard-coded/User-defined Report**, select **Hard-coded**.

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

   - To run a report that combines data from all sites within the Area, select **Area**, and then click the [🔍] next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

   - To run a report on one or more specific facilities select **Facility**, and then click the [🔍] next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

3. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

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

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

5. To view the report, follow the instructions in Viewing a Completed Report (Section 6.18).

5.6.3   Area Other National Measures Report: User-Defined Option

To run the Area Other National Measures Report with user-defined parameters, follow these steps:
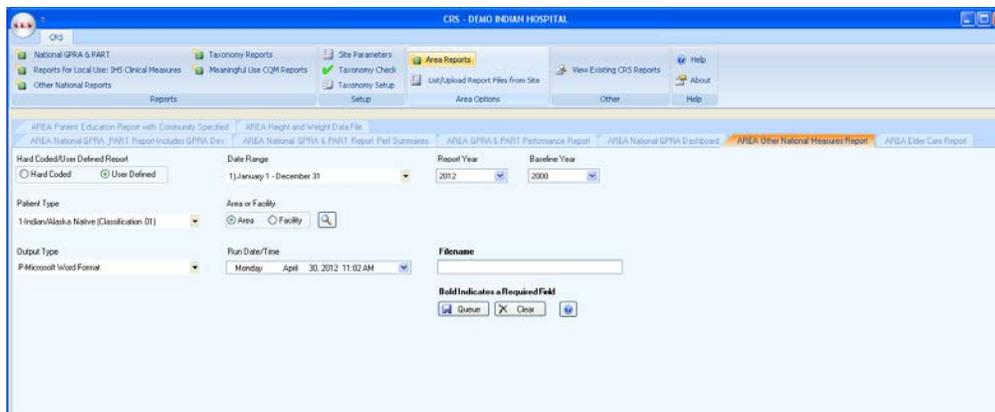
Figure 5-10: Visual CRS **Area Other National Measures Report** window (**User-defined Report** option)

1. Under **Hard-coded/User-defined Report**, select **User-defined**.

2. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

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

   - **2 - Not Indian Alaskan/Native (Not Classification 01)**

   - **3 - All (Both Indian/Alaska Natives and Non-01)**

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

   - To run a report that combines data from all sites within the Area, select **Area**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

   - To run a report on one or more specific facilities select **Facility**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

5. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

6. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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 12.1 User Manual* for additional information on the Area Elder Care Report.

5.7.1   Run the Area Elder Care Report

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area Elder Care Report** tab to display the **Area Elder Care Report** window.
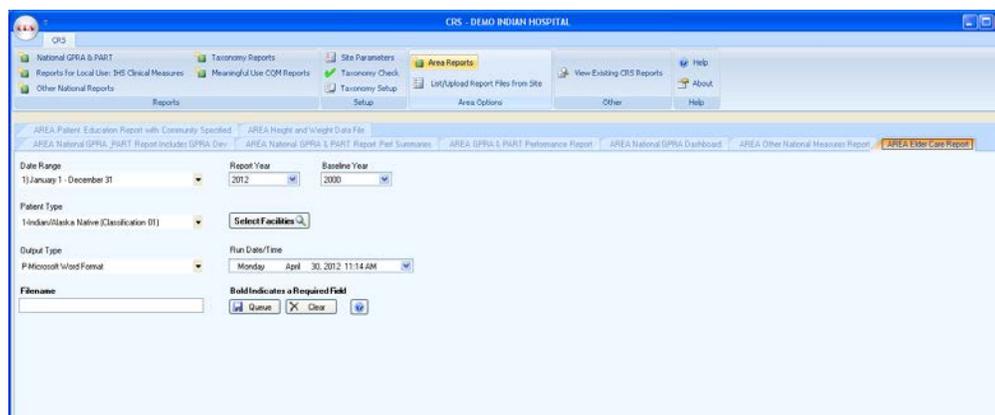
Figure 5-11: Visual CRS **Area Elder Care Report** window

3. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

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

- **2 - Not Indian Alaskan/Native (Not Classification 01)**

- **3 - All (Both Indian/Alaska Natives and Non-01)**

5. To select the facilities to include in the report, click the **Select Facilities** to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

6. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

7. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

5.8   Area Patient Education Report w/Community Specified

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

> **Note:**   See Section 6.2.7 in the *CRS Version 12.1 User Manual* for additional information on the Area Patient Education Report with Community Specified.

5.8.1   Run the Area Patient Education Report with Community Specified

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area Patient Education Report with Community Specified** tab to display the **Area Patient Education Report with Community Specified Report** window.
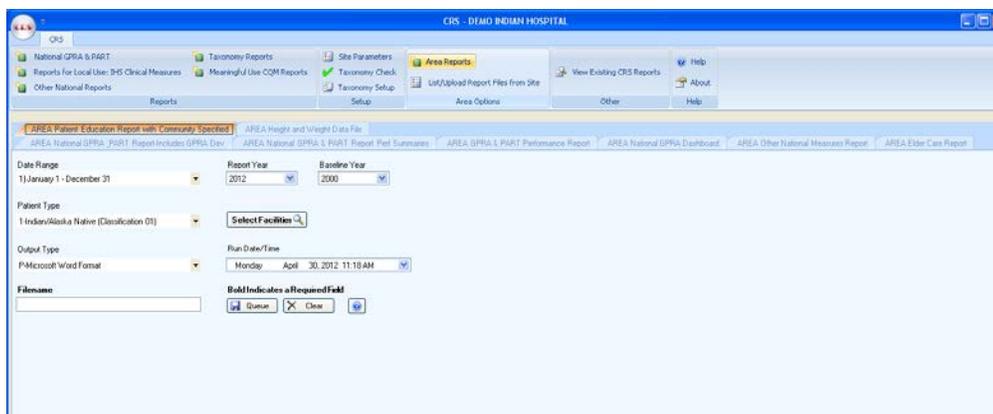
Figure 5-12: Visual CRS **Area Patient Education Report** window

3. To set the **Date Range, Report Year**, and **Base Line Year** options, follow the instructions in Selecting Report Dates (Section 6.16).

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

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

   - **2 - Not Indian Alaskan/Native (Not Classification 01)**

   - **3 - All (Both Indian/Alaska Natives and Non-01)**

5. To select the facilities to include in the report, click the **Select Facilities** to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

6. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

7. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

5.9   Area Height and Weight Data File

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

> **Note:** See Section 6.2.8 in the *CRS Version 12.1 User Manual* for
> additional information on the Area Height and Weight Data
> File.

5.9.1   Run the Area Height and Weight Data File

1. On the **CRS** ribbon, click the **Area Reports** menu in the **Area Options** group.

2. Click the **Area Height and Weight Data File** tab to display the **Area Height and Weight Data File Report** window.
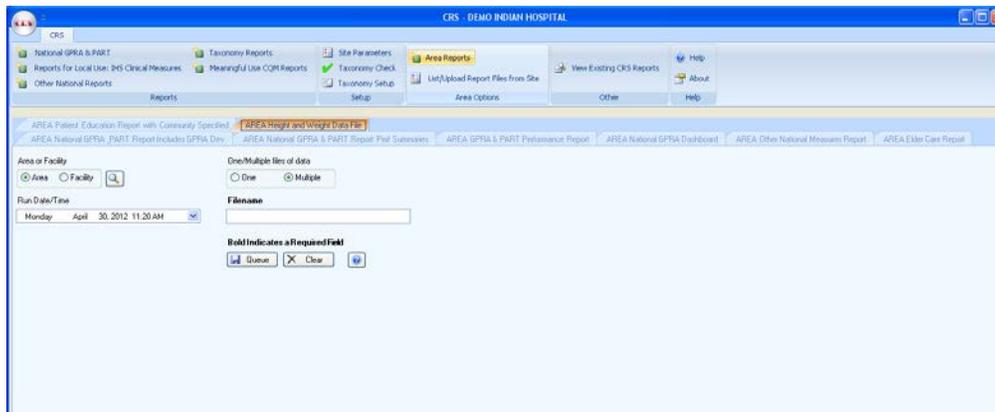
Figure 5-13: Visual CRS **Area Height and Weight Data File** window

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

   - To run a report that combines data from all sites within the Area, select **Area**, and then click the [🔍] next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

   - To run a report on one or more specific facilities select **Facility**, and then click the [🔍] next to the **Area or Facility** option to display the **Facilities** window and follow the instructions in Selecting a Facility (Section 6.8).

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

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

> **Note:** If you plan to use Microsoft Excel to review this data, use the **One** option *only* if you are certain that your file will contain fewer than 65,536 records (including the file header). Records in excess of 65,536 will not be visible in Excel.
>
> An automated file name beginning with "CRSHW" will be assigned to the file.

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

> **Note:** The last 10 characters of each automated file name will specify the number of the file and the total number of files created (e.g., 001_of_100).
>
> If you select this option and the number of records, including the file header, is less than or equal to 65,536, all records will be written to a single file.

5. To select the report output type and change the time and date for the report to run, follow the instructions in Selecting Report Output Options (Section 6.17).

6. To queue the report to run at the time specified under **Run Date/Time**, enter a file name in the **Filename** box 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 Viewing a Completed Report (Section 6.18).

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 windows opened by Visual CRS in the process of selecting report options, such as the **Taxonomy** window and the **Search Template** window, and for specifying report dates and report output options.

6.1 Help button

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

- On the **CRS** ribbon, click the **Help** menu in the Help group.

- Click in any report window to open the online Help.

- Click the **Report Status Help** button in the Report Status window.

6.2 About button

To display information about this version of Visual CRS, including the exact version number, click the **About** menu on the **CRS** ribbon in the Help group to display the **About CRS** dialog box.

To close the dialog box do one of the following:

- Click the **OK** button

- Click the in the top right-hand corner of the window.

6.3 Creating or Selecting 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 4.7 in the *CRS Version 12.1 User Manual* for additional information on the updating the RPMS Demo/Test Patient Search Template.

If your RPMS Demo/Test Patient Search Template does not contain any patients you will only receive the following pop-up message once when accessing the reports for the first time.

Figure 6-1: Visual CRS **Demo Patients** pop-up message

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

> **Note:** This pop-up message can be eliminated by adding a
> patient(s) to your RPMS Demo/Test Patient Search
> Template.

6.4   Selecting a Community Taxonomy

Many CRS reports allow you to select a community taxonomy. A community
taxonomy defines the range of communities where a facility's patients reside and
identifies the population being reported on. Use the **Site Parameters** (Section 4.3)
option to specify the default community taxonomy that your site is most likely to use.

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

> **Note:** See Section 4.1 in the *CRS Version 12.1 User Manual* for
> more information about community taxonomies and using
> Q-Man to define them.

6.4.1   Select a Community Taxonomy

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

1. To select a different community taxonomy for the report, click [🔍] next to the
    Community Taxonomy box to display the **Taxonomy** window with a list of the
    available taxonomies.

> **Note:** A report can be run using only one taxonomy at a time.
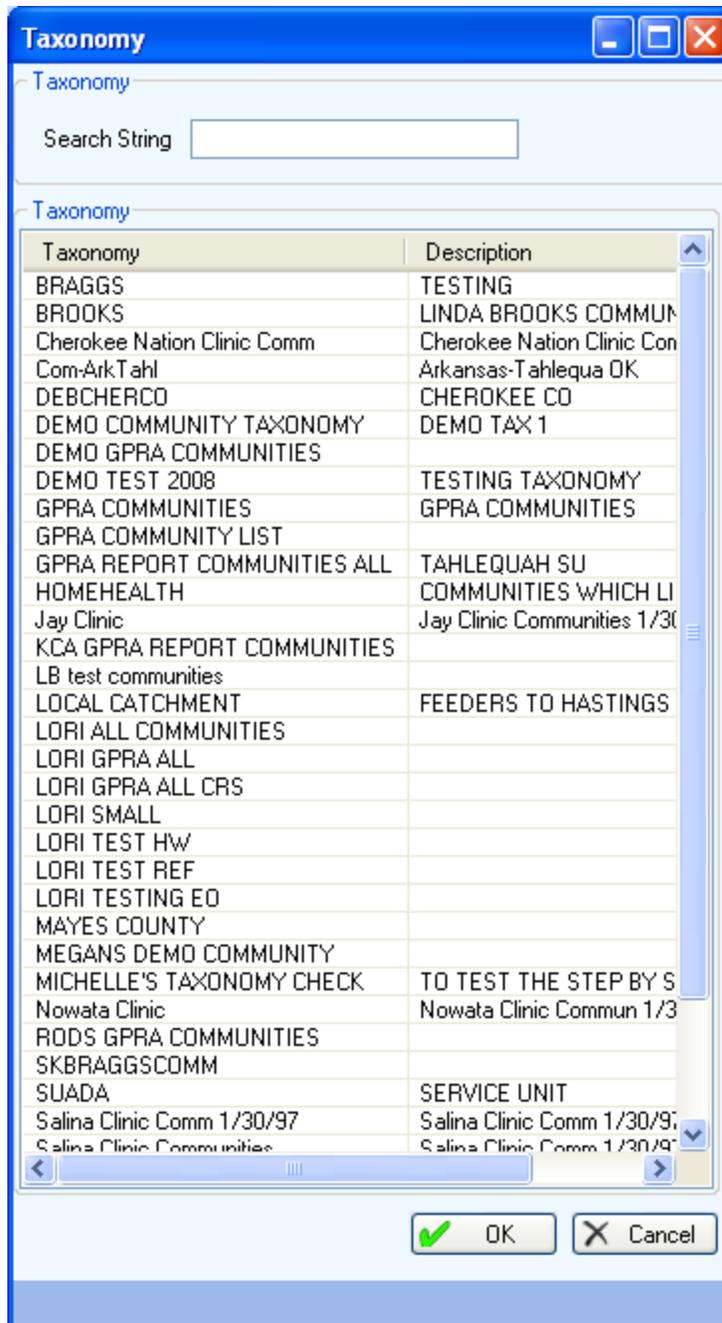
Figure 6-2: Visual CRS **Taxonomy** window

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** box, 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** box.

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

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

6.5   Selecting a Location

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

6.5.1   Select a Location

1. To select a location for the report, click 🔍 next to the **Location** box to display
   the **Edit Site Parameters** message:
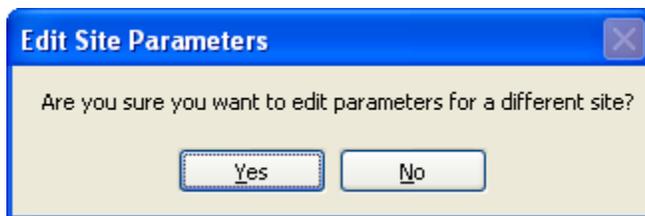
Figure 6-3: Visual CRS **Edit Site Parameters** message

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

> **Note:** Only one location can be selected as the site's Home
> location. The sites listed in the **Location** window are not
> limited to sites within your multi-divisional database. Be
> sure to select a in your database as the site's Home location.
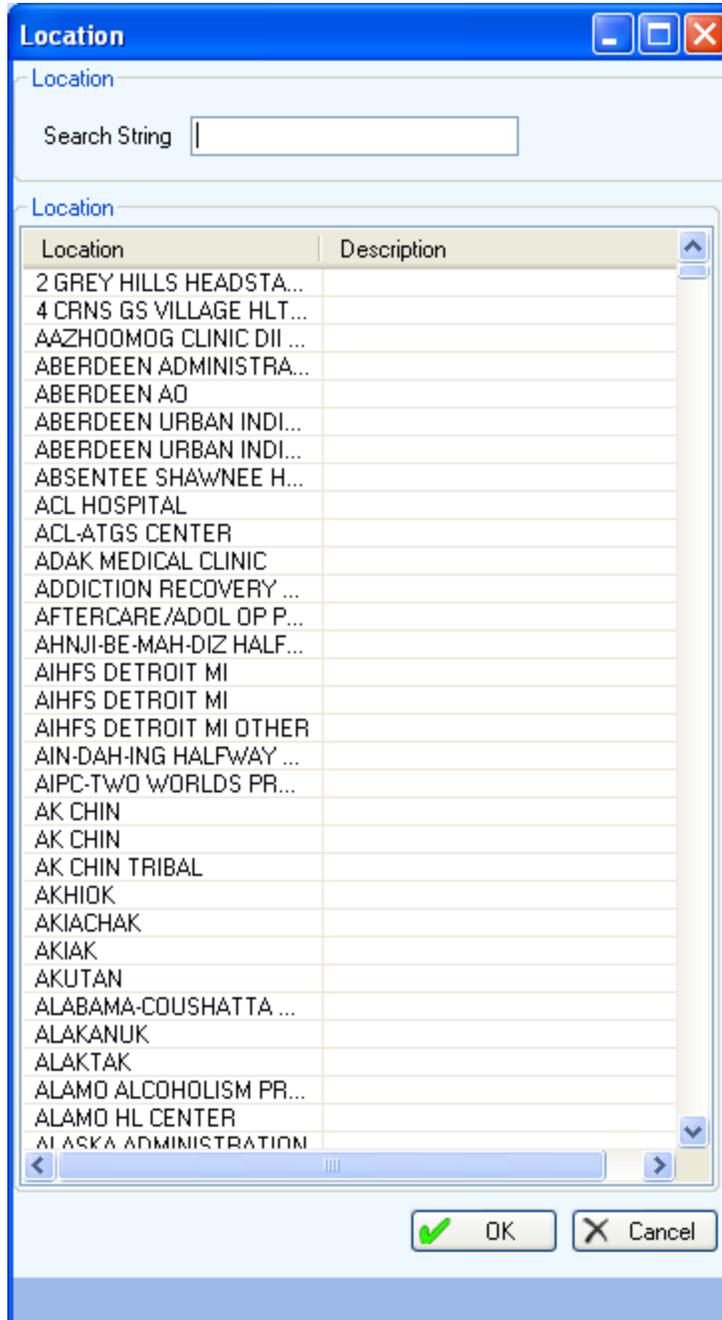
Figure 6-4: Visual CRS **Location** window

2. 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** box, 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** box.

3. When you have selected the correct location for the report, click **OK** to save and close the **Location** window.

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

6.6   Selecting Clinics

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

6.6.1   Select Clinics

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

1. To select one or more clinics for the report, click next to the **Clinic** box to display the **Clinic** window.
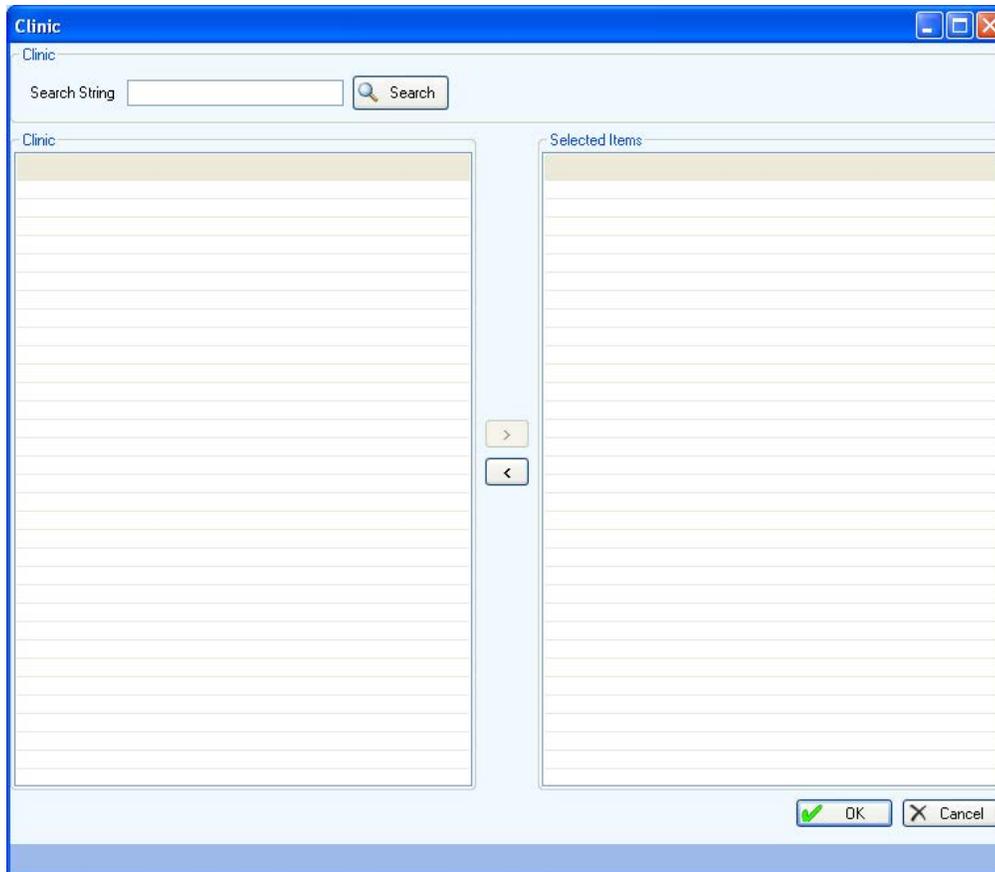
Figure 6-5: Visual CRS **Clinic** window

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

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

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

- Use the **Search String** box to filter the clinic list.
    - To display all clinics beginning with a specific letter, type the letter in the **Search String** box and click the **Search** button.
    - 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** box and click the **Search** button.

Note: Letters in the **Search String** box will be *included* in the filtered list.
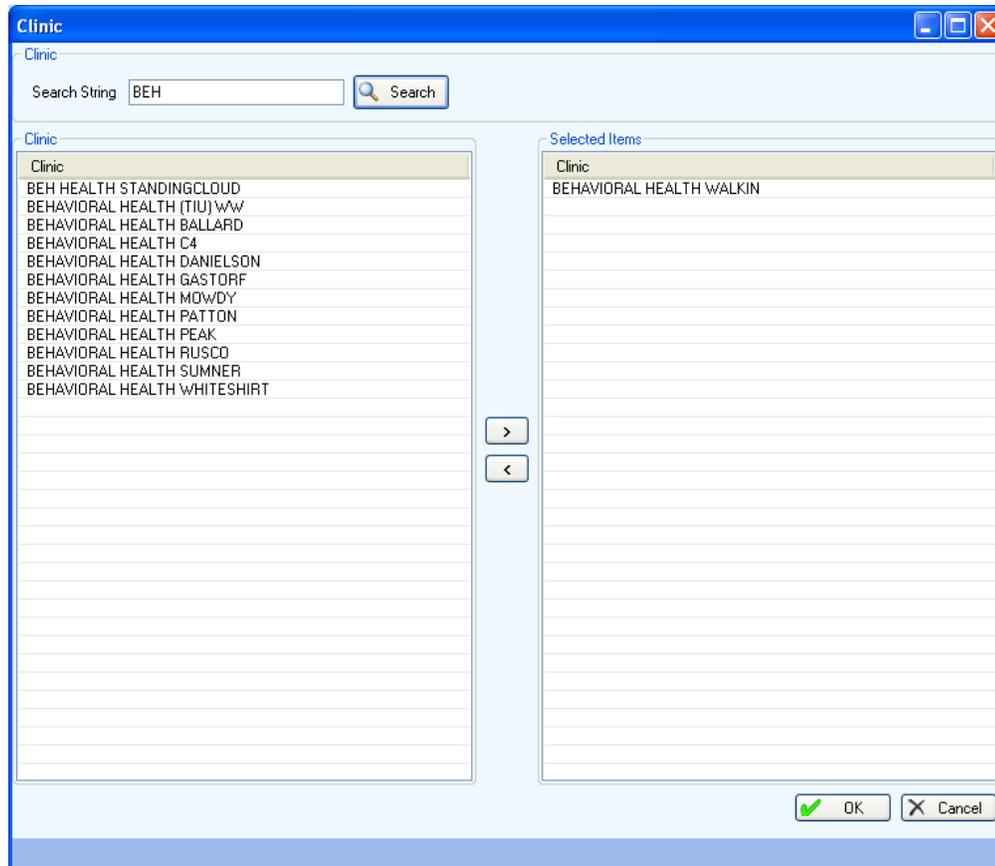
Figure 6-6: Visual CRS **Search String** box in the Clinic window

3. To add/remove clinic(s) for the report do one of the following:

- To add clinic(s) 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 clinic(s) in the **Clinic** list to add the clinic(s) to the **Selected Items** list.

  – Highlight the clinic in the **Clinic** list and click the [>] to add the clinics to the **Selected Items** list.

  – Use the Shift + Up/Down Arrow keys to highlight multiple contiguous clinics and click the [>] 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 [>] to add the clinics to the **Selected Items** list.

- 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 [<] 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 [<] 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 [<] to remove the clinics from the list.

4. When you have selected the clinic(s) for the report, click **OK** to save and close the **Clinic** window.

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

6.7   Selecting a Provider

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

6.7.1   Select a provider

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

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

Note: A report can be run for only one provider at a time.
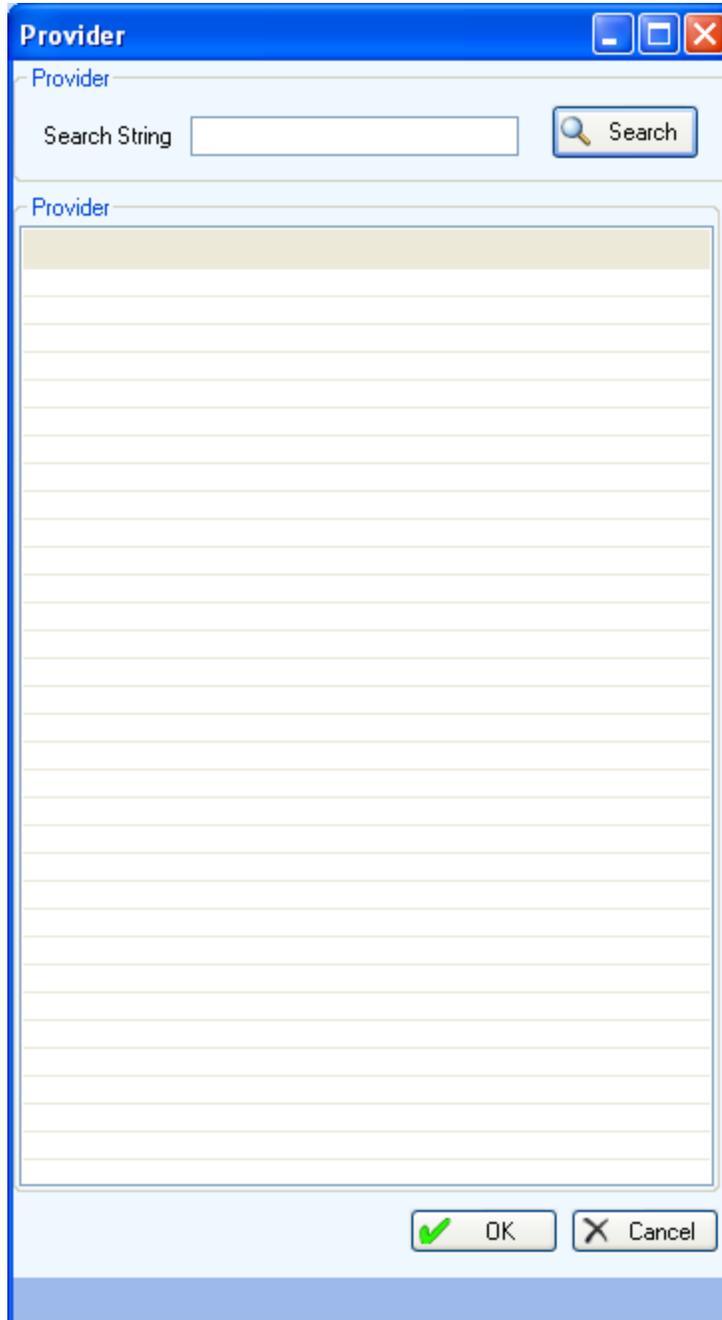
Figure 6-7: Visual CRS **Provider** window

2. To locate a specific provider, do one of the following:

- To display all the providers in the **Provider** list, leave the **Search String** box blank and click the **Search** button.

Note:	The entire list of clinics may be very long. Providers are displayed as Last Name,First Name (e.g., DEMO,DOCTOR).

- Use the **Search String** box to filter the provider list.

    – To display all providers whose last name begins with a specific letter, type the letter in the **Search String** box and click the **Search** button.

    – 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** box and click the **Search** button.

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

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

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

6.8   Selecting a Facility

CRS Area reports allow you to specify facilities to be included in the report.

6.8.1   Select a Facility

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

- To run a report that combines data from all sites within the Area, select **Area**, and then click the 🔍 next to the **Area or Facility** option to display the **Facilities** window.

   In the **Facilities** window, click the ⟩⟩ to add all sites to the **Items Selected** list. Click **OK** to save and close the **Facilities** window, or click **Cancel** to close the window without saving your selection.

> **Note:** The facilities that have uploaded their data files to the Area for the selected time period are displayed.
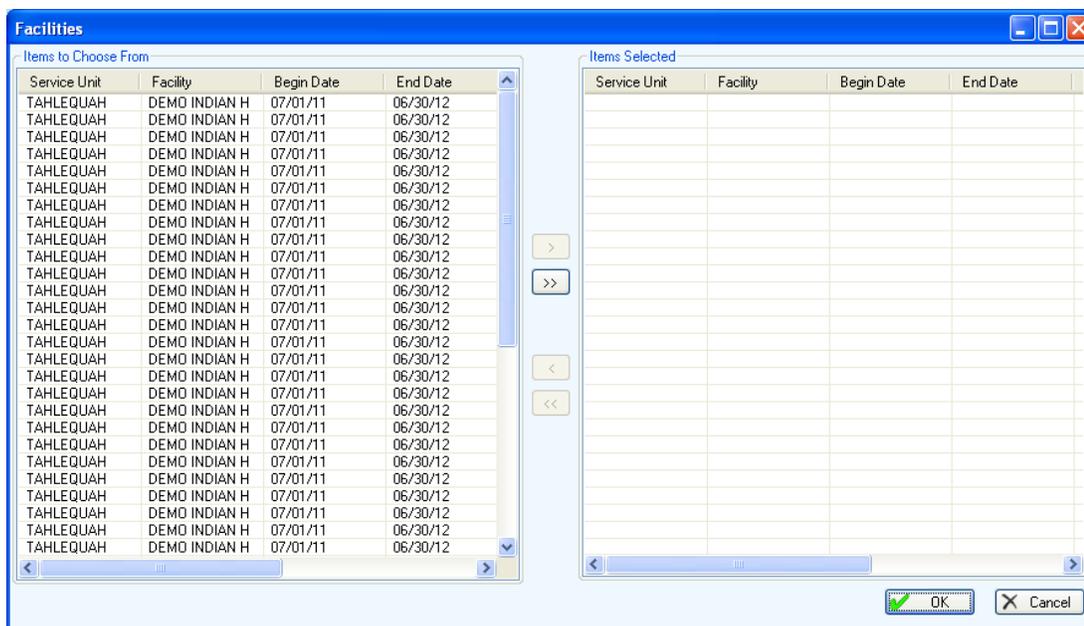
Figure 6-8: Visual CRS **Area Facilities** window

- To run a report on one or more specific facilities select **Facility**, and then

  click the 🔍 next to the **Area or Facility** option to display the **Facilities** window.

  Under 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 ⟩ to add the site to the **Items Selected** list.

  – Use the Shift + Up/Down Arrow keys to highlight multiple contiguous facilities and click the ⟩ 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 ⟩ to add the sites to the **Items Selected** list.

  – Click the ⟩⟩ 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 ⟨ 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 ⟨ < ⟩ 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 ⟨ < ⟩ to remove the sites from the list.

– Click the ⟨ << ⟩ to remove all the sites in the **Items Selected**.
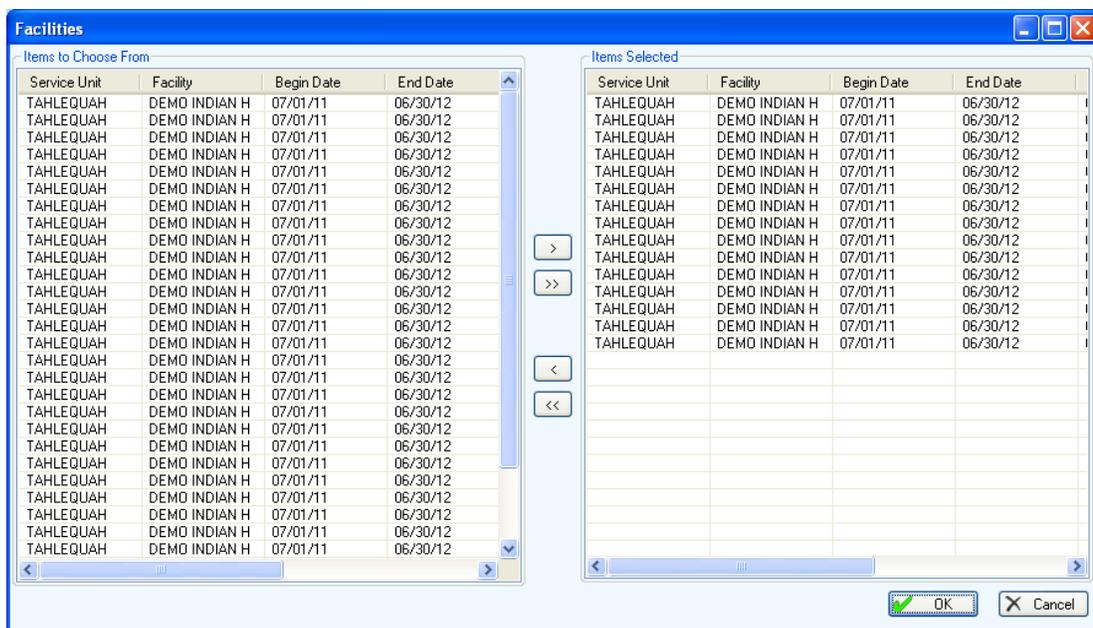
Figure 6-9: Visual CRS **Facility Facilities** window with selected facilities

2. After adding/removing facilities in the, **Items Selected** list, click **OK** to save and close the **Facilities** window, or click **Cancel** to close the window without saving your selection.

6.9   Add/Overwrite Search Template

The **Create Search Template for National Patient List** and **GPRA & PART Forecast Patient List** reports allow users to add a new search template or overwrite an existing search template.

6.9.1   Add/Overwrite a Search Template

1. In the **Search Template** window, do one of the following:

Figure 6-10: Visual CRS **Search Template** window

- To create a new search template, type the name of the template in the
  Template box and click **Next** button to display the **Add?** pop-up window and
  do one of the following:

  – To create the template, click **Yes** on the **Add?** pop-up window.

  – To cancel without creating the template, click **No** on the **Add?** pop-up
    window to return to the **Search Template** window.
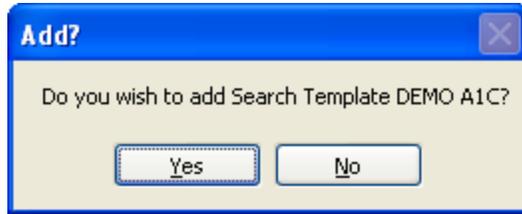
Figure 6-11: Visual CRS **Add?** pop-up window

- 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 the **Next** button to display the **Overwrite?** pop-up window and do one of the following:

  – To overwrite the template, click **Yes** on the **Overwrite?** pop-up window.
  – To cancel and return to the **Search Template** window without overwriting the template, click **No** on the **Overwrite?** pop-up window.
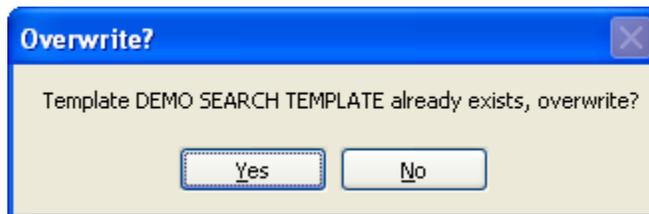
Figure 6-12: Visual CRS **Overwrite?** pop-up window

- To locate an existing template, type the first letter or letters of the template name in the **Template** box.

  If the template is already selected, click the **Next** button; otherwise, click the template name and click the **Next** button to display the **Overwrite?** pop-up window and do one of the following:

  – To overwrite the template, click **Yes** on the **Overwrite?** pop-up window.
  – To cancel and return to the **Search Template** window without overwriting the template, click **No** on the **Overwrite?** pop-up window.
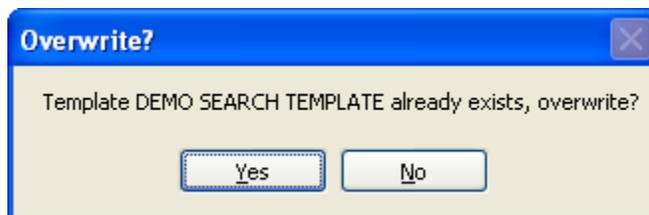
Figure 6-13: Visual CRS **Overwrite?** pop-up window

- To exit or cancel the **Search Template** window without creating or overwriting a search template, click the ☒ in the upper right corner or click the **Cancel** button in the lower right corner to display the **Cancel Selection?** pop-up window and do one of the following:

     – Click **Yes** on the **Cancel Selection?** pop-up window to close the **Search Template** window and return to the report window.

     – Click **No** on the **Cancel Selection?** pop-up window to return to the **Search Template** window.

Figure 6-14: Visual CRS **Cancel Selection?** pop-up window

6.10 Selecting a Search Template

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

> **Note:** The Selected Measures w/Patient Panel Population report uses a different window to select search templates. See Selected Measures w/Patient Panel Population (Section 3.2.2) and Selecting a Search Template (Selected Measures w/Patient Panel Population Report) (Section 6.11) for more information.
>
> See Section 5.8 in the *CRS Version 12.1 User Manual* for more information about creating search templates.

6.10.1 Select a Search Template

1. To select a provider for the report, click 🔍 next to the **Search Template** box to display the **Search Templates** window.

> **Note:** A report can be run for only one search template at a time.

Figure 6-15: Visual CRS **GPRA & PART Forecast Patient List Search Template** window

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** box.

If the template is already selected, click the **OK** button; otherwise, click the template name to highlight it and then click the **OK** button to save and close the **Search Template** window and return to the report window.

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

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

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

> **Note:** Other CRS reports use a different window to select search templates. See GPRA & PART Forecast Patient List (Section 3.1.8), Patient Education w/Patient Panel Population (Section 3.3.5.2), and Selecting a Search Template (Section 6.10) for more information.
>
> See Section 5.8 in the *CRS Version 12.1 User Manual* for more information about creating search templates.

6.11.1 Select a Search Template

1. To select a provider for the report, click next to the **Search Template** box to display the **Search Templates** window.

> **Note:** A report can be run for only one search template at a time.

Figure 6-16: Visual CRS **Search Template** window

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** box.

If the template is already selected, click the **OK** button; otherwise, click the template name to highlight it and then click the **OK** button to save and close the **Search Template** window and return to the report window.

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

6.12   Selecting Measures and Patient Lists

Some CRS report options require you to select one or more performance measures to be reported on, and then to select one or more patient list or 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** window, as shown below.

Figure 6-17: Visual CRS **Select Measures** button

> **Note:** For instructions on selecting performance measures and patient lists for reports with different options, see Selecting Performance Measures (Section 6.13) and Selecting Patient Lists (Section 6.14).

6.12.1   Select Measures and Patient Lists

1. Click **Select Measures** button at the top of the report window to display the **Measures** window.
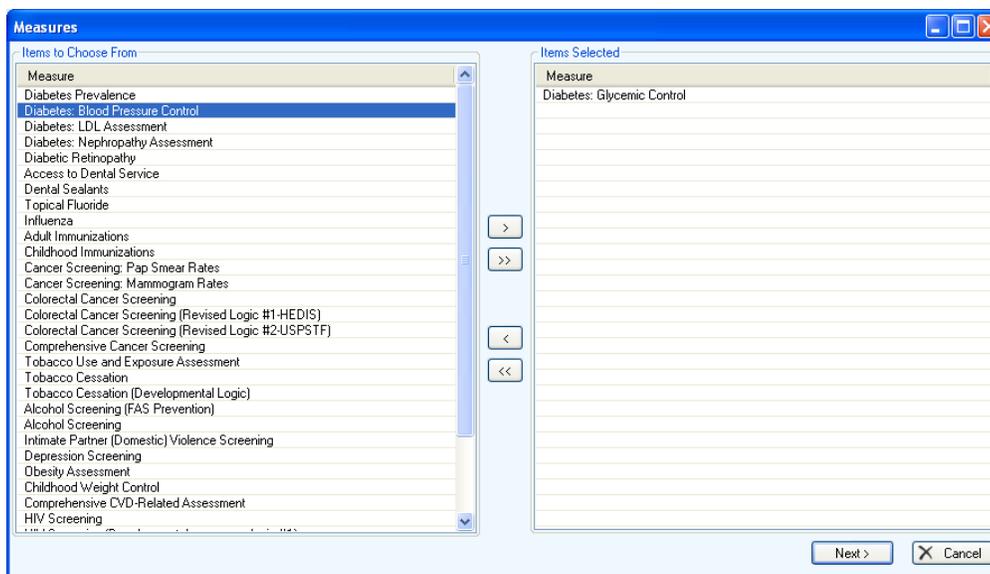
Figure 6-18: Visual CRS **Measures** window

> **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. Under the **Items to Choose From** list, do one of the following to add measure(s) 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 ⟨ > ⟩ add the measure to the **Items Selected** list.

   - Use the Shift + Up/Down Arrow keys to highlight multiple contiguous measures and click the ⟨ > ⟩ 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 ⟨ > ⟩ to add the measures to the **Items Selected** list.

   - Click the ⟨ >> ⟩ to add all measures to the **Items Selected** list.

   To remove measure(s) 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 [<] 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 [<] 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 [<] to remove the measures from the list.

- Click the [<<] to remove all the measures in the **Items Selected**.

> **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.

3. After adding/removing measure(s) in the, **Items Selected** list, do one of the following:

- To close the **Measures** window without saving your selection, click **Cancel** or click the ❌ in the top right corner to display the **Continue?** pop-up message and do one of the following:

  – Click "**Yes**" to close the window **Measures** window.
  – Click "**No**" to return to the **Measures** window.

Continue?

Cancelling out of Measures/Patient Lists Selection will clear all measures/lists already selected, Continue?
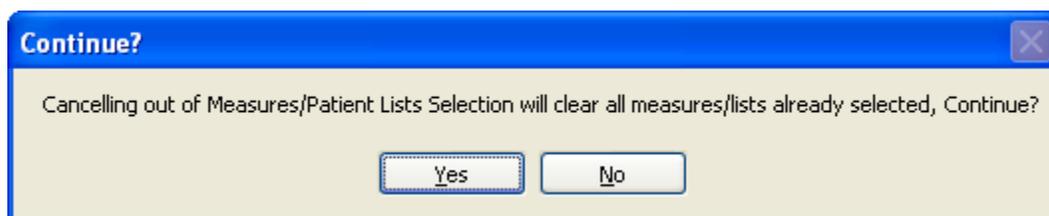
[Yes]   [No]

Figure 6-19: Visual CRS **Continue?** pop-up message window

- To save the selected measure(s) and display the **Patient List** window for each selected measure, click **Next**.
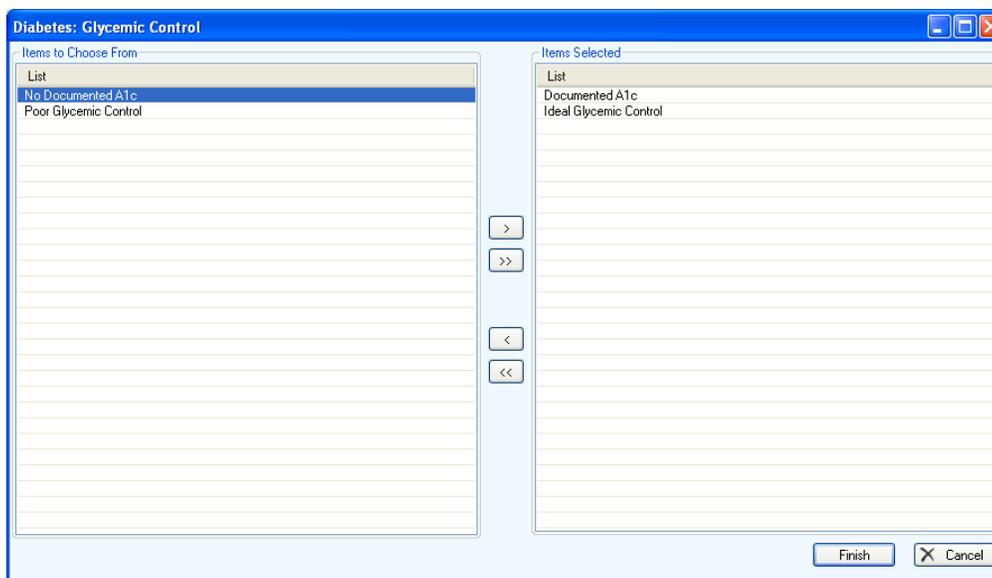
Figure 6-20: Visual CRS **Patient List** window

> **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).

4. In the **Patient List** window, do one of the following:

- To select patient lists, follow the instructions in **Step 2** above. To close the window and save the selected patient lists, click **Save**.

  If you selected more than one performance measure in Step 2, clicking **Next** will display a new patient list window for each measure selected. When you have selected patient lists for each measure, clicking **Finish** will close the patient list window of the last measure selected and return to the report window. A green checkmark will appear on the **Select Measures** button indicating measure and patient lists have been selected for the report.

- To close the **Patient List** window without saving your selection, click **Cancel** or click the ☒ in the top right corner to display the **Continue?** pop-up message and do one of the following:

  – Click "**Yes**" to close the **Patient List** window and return to the report window.

> **Note:** By clicking **Yes**, any 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** window.
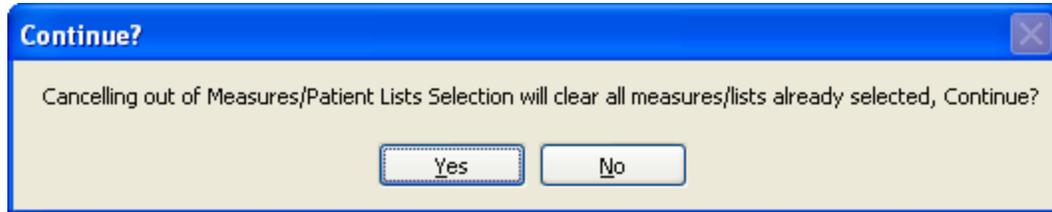
Figure 6-21: Visual CRS **Continue?** pop-up message window

6.13   Selecting Performance Measures

Some CRS report options allow you to select one or more performance measures to be reported on. The measures available vary depending on the specific report or patient list being run.

This procedure applies to reports with the following options in the report definition window:

- A radio button allowing you to choose the **All** or **Selected** measures option and a search button, to display the **Selected** measures available to choose from, as shown below:

Figure 6-22: 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 below:

Figure 6-23: **Selected Measures (User Defined)** option and search button

- A drop-down list with the **Menu Set Measures** option and a search button, to display the **Menu Set Measures** measures available to choose from, as shown below:

Figure 6-24: **Menu Set Measures** option and search button

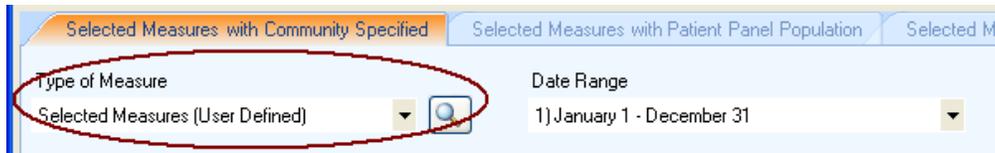Some report options also allow you to select one or more patient lists or sub-measures for each selected performance measure. See Selecting Patient Lists (Section 6.14) for instructions.

> **Note:** For instructions on selecting performance measures and patient lists for reports with different options, see Selecting Measures and Patient Lists (Section 6.12).

6.13.1   Select Performance Measures

1. Under **All/Selected Measures** click the **Selected** radio button and click 🔍 next to the **All/Selected Measures** option box, or choose **Selected Measures (User Defined)** in the **Type of Measure** drop-down list and click 🔍 next to the **Type of Measure** option box, to display the **Measures** window.
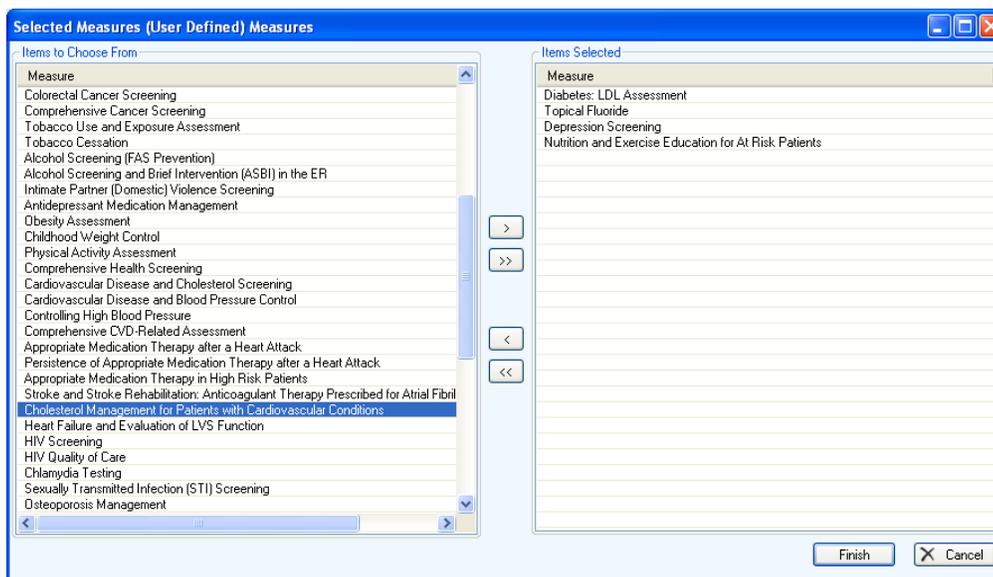
Figure 6-25: Visual CRS **Measures** window

> **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. Under the **Items to Choose From** list, do one of the following to add measure(s) 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 [>] add the measure to the **Items Selected** list.

- Use the Shift + Up/Down Arrow keys to highlight multiple contiguous measures and click the [>] 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 [>] to add the measures to the **Items Selected** list.

- Click the [>>] to add all measures to the **Items Selected** list.

To remove measure(s) 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 [<] 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 [<] 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 [<] to remove the measures from the list.

- Click the [<<] to remove all the measures in the **Items Selected**.

3. After adding/removing measure(s) in the **Items Selected** list, do one of the following:

  - To close the **Measures** window without saving your selection, click **Cancel** or click the ☒ in the top right corner to display the **Continue?** pop-up message and do one of the following:

    – Click "**Yes**" to close the window **Measures** window.
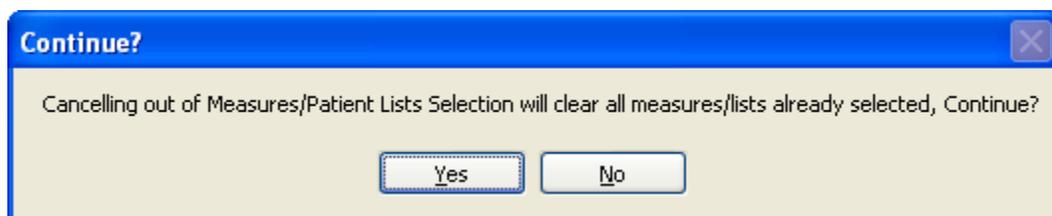   – Click "**No**" to return to the **Measures** window.

Figure 6-26: Visual CRS **Continue?** pop-up message window

- To save the selected measure(s) and return to the report window, click **Finish**. A green checkmark will appear on the search measures button indicating measure(s) have been selected for the report.

6.14   Selecting Patient Lists

Some CRS report options allow you to select one or more patient lists for the performance measures being reported on. The patient lists available vary depending on the specific performance measures being used.

This procedure applies to reports with a **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, as shown below.

Figure 6-27: Visual CRS **Patient Lists** option with select lists button

The **Patient Lists** option radio buttons and select lists button are only active if you have already selected performance measures. See **Selecting Performance Measures** (Section 6.13) for instructions.

> **Note:** Users must have the BGPZ PATIENT LIST security key to run patient lists. The options under **Patient Lists** will be inactive for users without this security key.
>
> For instructions on selecting performance measures and patient lists for reports with different options, see Selecting Measures and Patient Lists (Section 6.12).

6.14.1   Select Patient Lists

1. Click **Yes** under the **Patient Lists** option and click [🔍] next to the **Patient Lists** option box, to display the **Patient Lists** window.
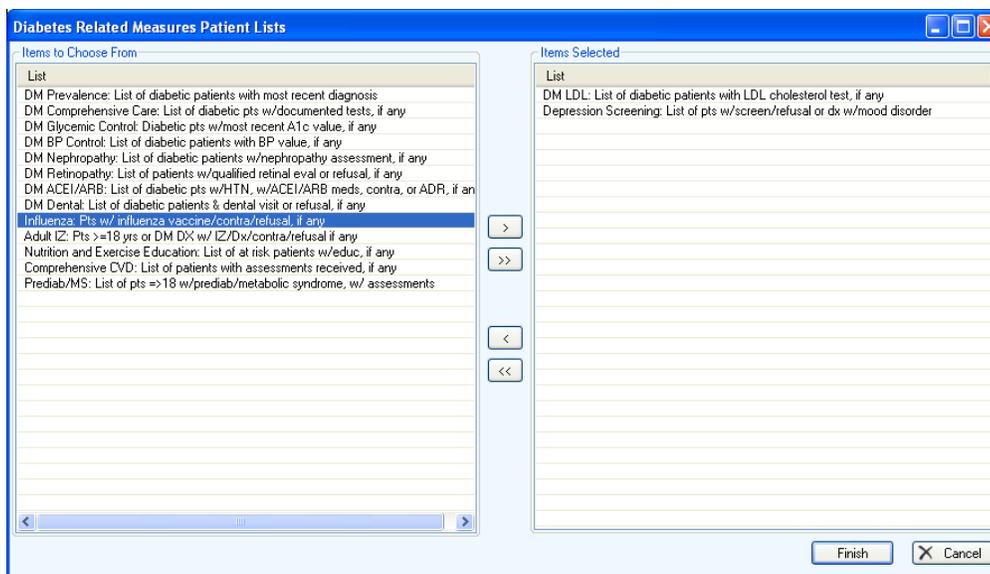
Figure 6-28: Visual CRS **Patient Lists** window with sample data

> **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. Under the **Items to Choose From** list, do one of the following to add patient
    list(s) 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 ⌐ > ⌐ 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 ⌐ > ⌐ 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 ⌐ > ⌐ to add the
      patient lists to the **Items Selected** list.

    - Click the ⌐ >> ⌐ to add all patient lists to the **Items Selected** list.

    To remove patient list(s) 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 ⌐ < ⌐ 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 [<] 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 [<] to remove the patient lists from the list.

- Click the [<<] to remove all the patient lists in the **Items Selected**.

3. After adding/removing patient list(s) in the **Items Selected** list, do one of the following:

   - To close the **Patient Lists** window without saving your selection, click **Cancel** or click the ❌ in the top right corner to display the **Continue?** pop-up message and do one of the following:

     – Click **Yes** to close the window **Patient Lists** window.
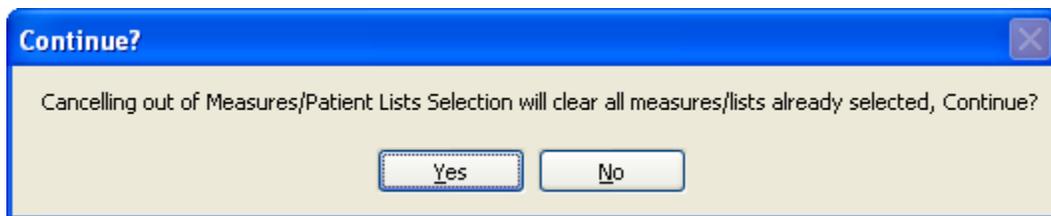   – Click **No** to return to the **Patient Lists** window.

Figure 6-29: Visual CRS **Continue?** pop-up message window

6.15   Selecting Multiple Patients

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

This procedure applies to reports with a select **Patient** option and a search patient button in the report window, to display the **Select Patient** window, as shown below.
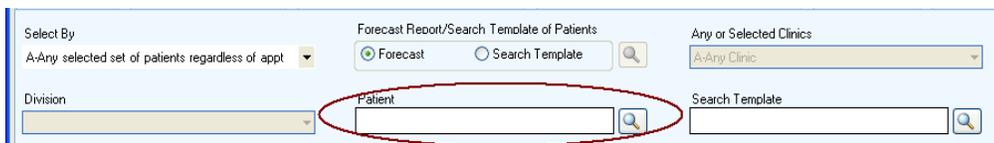

Figure 6-30: Visual CRS select **Patient** option and a search patient button

6.15.1   Select Multiple Patients

1. Click 🔍 next to the **Patient** box, to display the **Select Patient** window.
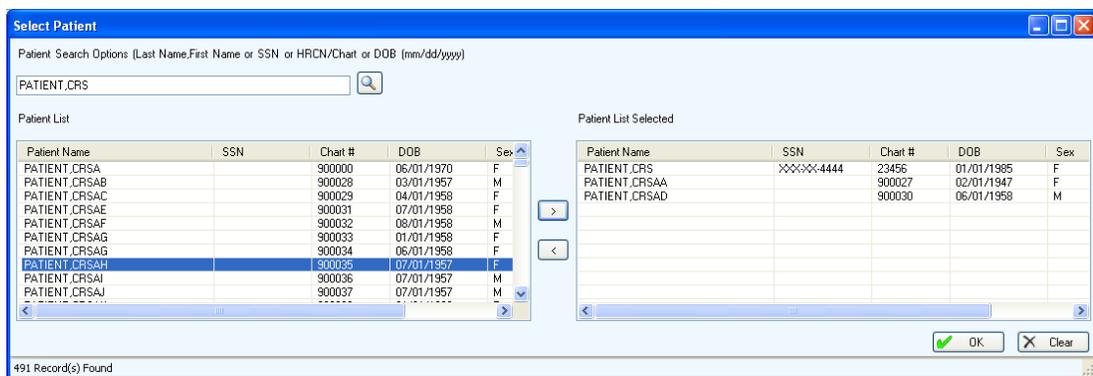
Figure 6-31: Visual CRS **Select Patient** window

> **Note:** Available patients will appear in the **Patient List** pane (the left pane) after you complete the next step. If patients have been selected, they will appear in the **Patients List Selected** pane (the right pane).

2. In the **Patient Search Options** box 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 [icon] next to the **Patient Search Options** box.

3. Under the **Patient List** pane, do one of the following to add patient(s) 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 [icon] 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 [icon] 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 [icon] 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 window and start over, click **Clear** and repeat Step 2.

To remove patient(s) 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 ⟨ 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 ⟨ 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 ⟨ to remove the patients from the list.

3. After adding/removing patient(s) in the **Patient List Selected** pane, do one of the following:

- To save the selected patient(s) and return to the report window, click **OK**.

> **Note:** The patient's name is displayed in the **Patient** box in the report definition window. If multiple patients are selected the text **Multiple Patients Selected** will be displayed in the **Patient** box.

- To close the **Select Patient** window and return to the report window without saving your selection, click the ❌ in the top right corner to display the **Continue?** pop-up message and do one of the following:
  - Click **Yes** to close the window **Select Patient** window.
  - Click **No** to return to the **Select Patient** window.

Continue?

Cancelling out of Measures/Patient Lists Selection will clear all measures/lists already selected, Continue?
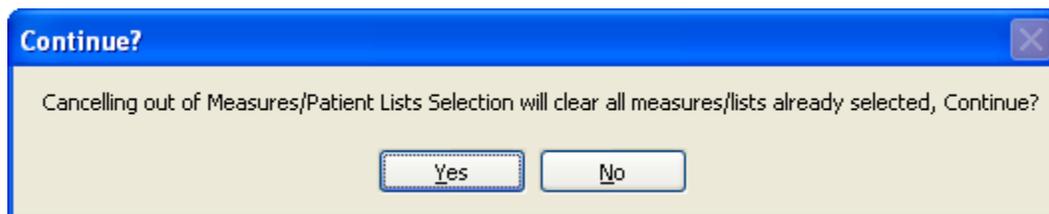
[Yes]   [No]

Figure 6-32: Visual CRS **Continue?** pop-up message window

6.16   Selecting Report Dates

Many CRS reports allow you to specify the date range of the report data (the beginning and ending calendar months), the year of the report, and the baseline year the report data is being compared to.

There are two ways to select date ranges:

- 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 **Select a predefined date range** (Section 6.16.1) below for instructions.

- Run the report for a user-defined period.

    See **Specify a user-defined report period** (Section 6.16.2) below for instructions.

Reports such as the **National GPRA & PART Report** use a predefined report period of July 1, 2011 through June 30, 2012, with a baseline year of July 1, 1999 through June 30, 2000.

6.16.1   Select a Predefined Date Range

1. In 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** box, do one of the following:

   - Type the year of the report end date.

   - Click the arrow to display the calendar, navigate to a month in the year of the report end date, and then click any date in that month.

3. If your report has a **Base Line Year** box, do one of the following:

   - Type the year of the baseline end date.

   - Click the arrow to display the calendar, navigate to a month in the year of the baseline end date, and then click any date in that month.

6.16.2   Specify a User-Defined Report Period

1. In the **Date Range** list, select **User Defined Report Period**.

2. Your report may have a **Report Year** box or a **Base Line Year** box. 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** box. To set the date, do one of the following:

   - Select the month, date, and/or year that appears in the box. Type the month, date, and/or year of the date you want the report period to end, or use the UP and DOWN ARROW keys for each component to select the correct date.

   - Click the arrow to display the calendar, navigate to the month and year you want the report period to end, and then click the correct date in that month.

4. Your report may have a **Report End Date** or **Visit End Date** box. To set the date, do one of the following:

   - Select the month, day, and/or year that appears in the box. 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.

6.17   Selecting Report Output Options

Most CRS reports can be output in either Microsoft Word format, Microsoft Excel format, or both. Because a large report can take a very long time to run, Visual CRS also provides the option to queue reports to run at a time you specify.

Completed reports are stored on the personal computer used to run them and can be viewed from within Visual CRS.

6.17.1   Select Report Output Options

Figure 6-33: Visual CRS report **Output Type** and **Run Date/Time** options

1. In the **Output Type** list, select one of the following:

   - **P-Microsoft Word Format** to create a Microsoft Word document that can be printed or viewed on the screen.

   - **D-Microsoft Excel Format** to create a delimited file that can be opened in Microsoft Excel.

- **B-Both Microsoft Word and Excel Format** to create both a Word document and an Excel document.

> **Note:** The B-Both Microsoft Word and Excel Format option is not available in for Meaningful Use Reports. Meaningful Use reports include an option X-XML Format output type.

2. To change the date the report will run, the **Run Date/Time** box 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.

6.18   Viewing a Completed Report

The **Report Status** window 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 6-34: Visual CRS **Report Status Check** window

- To view a report with a **Report Status** of "COMPLETED", do one of the following to open the report file(s):

  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** window.

  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** window 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 window or press the Enter key.

– Press and hold the Ctrl key and use 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 window 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** window or press the Enter key.

- The **Type of Output** column displays the **Output Type** selected during the creation of the report. See **Selecting Report Output Options** (Section 6.17) 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** pop-up message will be displayed and do one of the following:

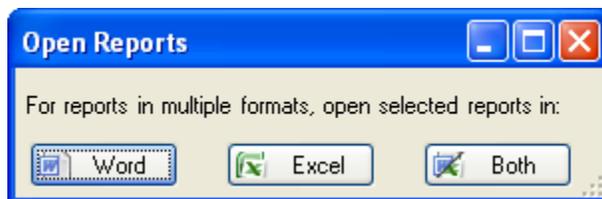|	
Note:	The B-Both Microsoft Word and Excel Format option is not available in for Meaningful Use Reports. For Meaningful Use Reports only, if "XML Format" is displayed in the Type of Output column, the report will open in Microsoft Word.

Figure 6-35: Visual CRS **Open Reports** pop-up window

- To open the report in Microsoft Word, click the **Word** button.

- To open the report in Microsoft Excel, click the **Excel** button

- To open the report in both Microsoft Word and Excel, click the **Both** button

- To cancel without opening the report in any format, click the ❌ in the top right corner of the **Open Reports** pop-up message.

- 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.

- 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 File(s)** column.

6.19   Viewing Existing CRS Reports

Reports get generated each time they are opened from the Report Status window, 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, click the **View Existing CRS Reports** menu in the **Other** group.

2. Browse to the report directory, highlight the report you want to view, and click **Open**.

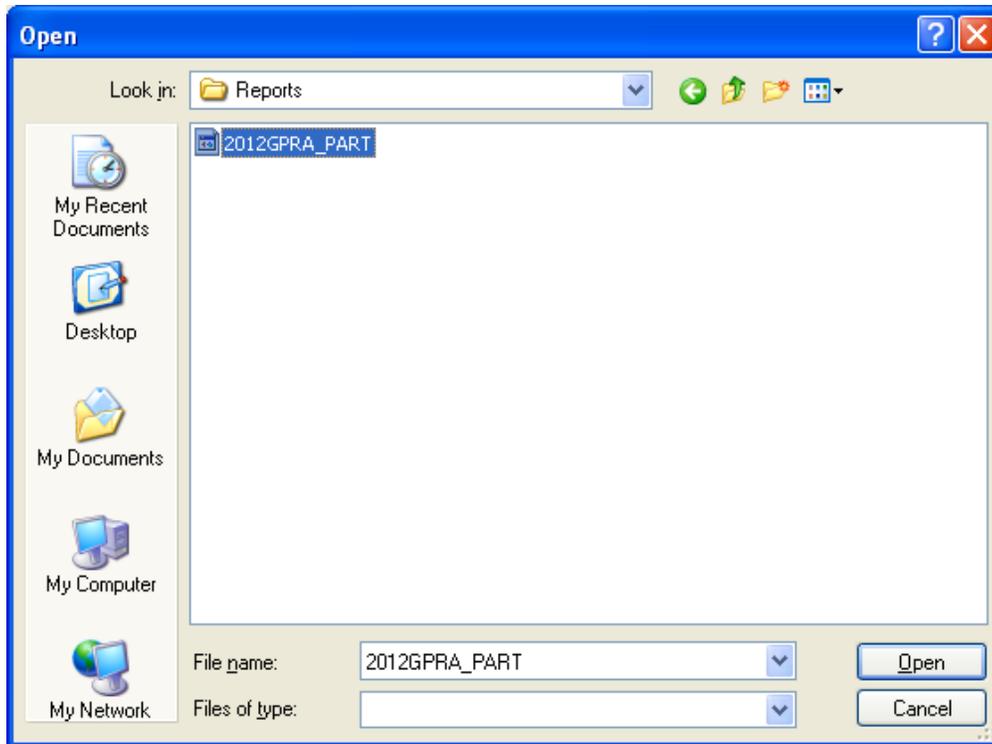> **Note:** The report will open using the report output type selected when the report was created.

Figure 6-36: Visual CRS **Open** report window

Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

Phone: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm

Email: support@ihs.gov