

**Department of Veterans Affairs**

**Event Capture Graphical User Interface**

**User Manual**



**Software Version 2.0**

**Patch EC\*2\*119**

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**Office of Information and Technology (OIT)**

**Product Development**



# Revision History

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# 1 Introduction

The Event Capture Graphical User Interface (GUI) User Manual provides instructions for using the Event Capture options within the GUI setting. The target audience for this manual includes Event Capture managers, application coordinators (ADPACs) and others who use the software.

The GUI provides a consistent, event driven, windows style, user interface for Event Capture. The GUI captures all the utilization data that is presently available in Event Capture.

The Event Capture software provides a mechanism to track and account for procedures and delivered services that other VistA packages do not handle. The procedures and services tracked through Event Capture are associated with the following:

- The patient to whom they were delivered
- The provider requesting the service or procedure
- The DSS Unit responsible for delivering the service

DSS Units typically represent the smallest identifiable work unit in a clinical service at a medical center and Veterans Affairs Medical Centers (VAMCs) define them. A DSS Unit can represent any of the following:

- An entire service
- A section of a service
- A small section within a section
- A medical equipment item used in patient procedures

The user must define the following items for every DSS Unit:

- Service - The service associated with the DSS Unit.
- Cost Center - Fiscal identifier for the service using the particular DSS Unit (Cost Centers are defined in detail in the MP4-Part V Appendix B of the Fiscal Service cost manuals.)
- Medical Specialty - The specialty section associated with the DSS Unit.

## 1.1 Sensitive Information

To avoid displaying sensitive information regarding our patients and staff, the examples in this manual contain pseudonyms or scrambled data instead of real names. Our patients and staff will be referred to as "ECPATIENT, ONE", "ECPROVIDER, ONE", or "USER, ONE." Scrambled data is a series of random letters that replace a real name like "AAADY, JWHTRE". Likewise, real social security numbers (SSNs), real addresses and other personal identifiers are not used.

## 1.2 508 Compliant GUI

Section 508 of the Rehabilitation Act Amendments of 1998 requires that when Federal agencies develop, procure, maintain, or use electronic and information technology, they shall ensure that the electronic and information technology allows persons with disabilities to have access to, and use of, information and data that is comparable to the access to and use of information and data by persons who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

The Section 508 Accessibility Testing and Training Center (T&TC) was consulted and modifications to the GUI have been made to meet the requirements for 508 Compliance. Event Capture was modified to allow screen readers to accurately interpret information on the screens. As a result, some buttons and boxes have been moved, replaced or renamed and some screen titles have been modified.

For more information on the VA 508 Compliance efforts, please visit the following website <http://www.va.gov/oit/ea/section508/>.

## 1.3 Related Manuals


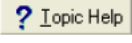
The documentation for Event Capture V. 2.0 includes the following related manuals.

- Event Capture Monograph
- Event Capture V2.0 Installation Guide
- Event Capture V 2.0 Technical Manual
- Event Capture V 2.0 User Manual
- Event Capture GUI Release Notes

These documents can be found at:

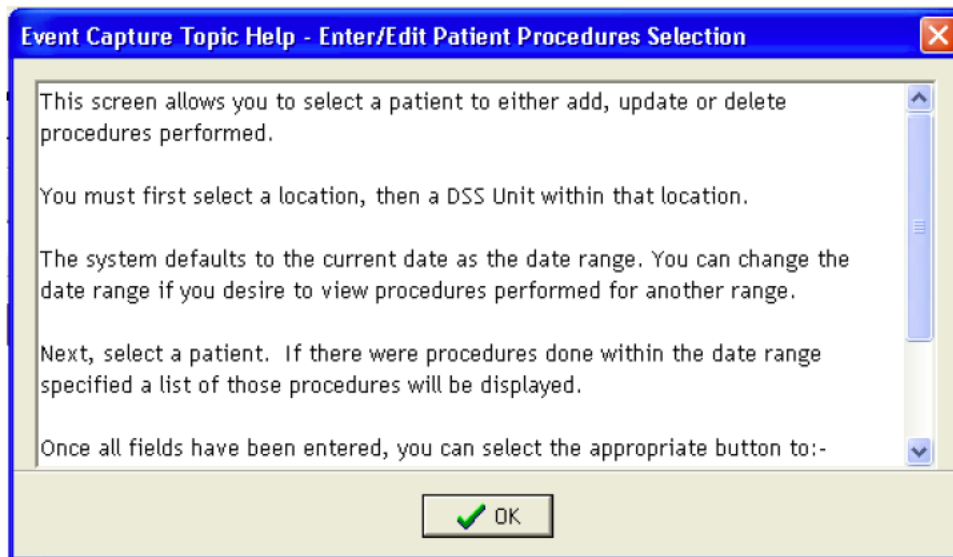
<http://www.va.gov/vdl/application.asp?appid=39>

## 1.4 Event Capture Online Documentation

Throughout the entire Event Capture system, click on the question mark option located at the toolbar  or on the bottom right corner of the screen , to obtain online information for any screen. This help corresponds with the information that is in the User Manual.

To obtain online information for a field, click on that field and then press <F1>.

### Example: Online Help Screen




## 1.5 Event Capture Interface with CPRS

Access to Event Capture is possible via the Computerized Patient Record System (CPRS). The intention of this design was to increase the use of Event Capture by clinicians currently using CPRS. The creation of a link and a single point of entry make it so users can access both systems.

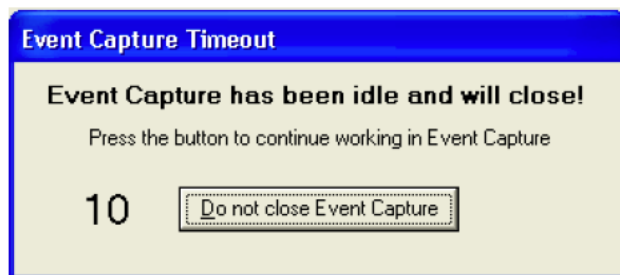
The interface between CPRS and Event Capture allows users to:

- Access Event Capture from within CPRS through a single sign-on
- Select Event Capture Interface in the CPRS Tool Menu allowing the user to enter Event Capture patient procedures

## 1.6 Timeout Feature

Event Capture includes a timeout feature consistent with CPRS. A countdown screen will display warning of the pending timeout of the application when the Event Capture application is idle for a user-defined amount of time. If the user takes no action, the application will close. The amount of time for the timeout and countdown features is user-defined at the application server level. Click on the  button to stay connected.

### Example: Event Capture Timeout Screen



## 2 Orientation

The design of the Event Capture User Manual is for use as an instructional guide to using the Event Capture software. The user can use this manual in conjunction with the *Event Capture GUI Online help* option.

Screen displays may vary among different sites and the data may not appear on the terminal exactly as shown in this manual. Although screens are subject to modification, the major menu options as they appear in this manual are fixed and are not subject to modification (except by the package developer).

### 2.1 Online Help

Help is available at almost any prompt in the Event Capture application. Pressing <F1> will provide the needed information to help the user answer the prompt.

### 2.2 Frequently Asked Questions (FAQ)

#### **How can I access the Event Capture Graphical User Interface (GUI)?**

Users need an Access Code and Verify Code obtained from their local Information Resource Management (IRM) staff to use the Event Capture (GUI).

#### **How do I logon to the Event Capture GUI?**

Event Capture is usually accessed through a desktop shortcut that points to the installation location. Ask the local support staff for assistance.

#### **What other logon problems should I anticipate?**

If Event Capture launches then it disappears or is not responding, check your firewall (for example, Black Ice). Make sure the listed IP address is correct and not blocked for the system with which it is communicating. Your local support staff can assist you.

#### **What can cause the GUI to appear distorted? Missing scrollbars? Missing columns or missing rows?**

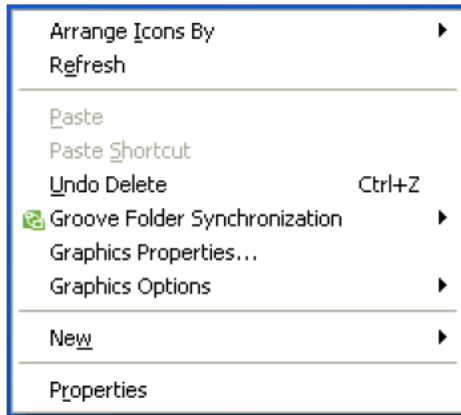
The screen resolution needs to be set to 96 dots per inch (DPI).



**Follow the instructions below to set the screen resolution to 96 DPI:**

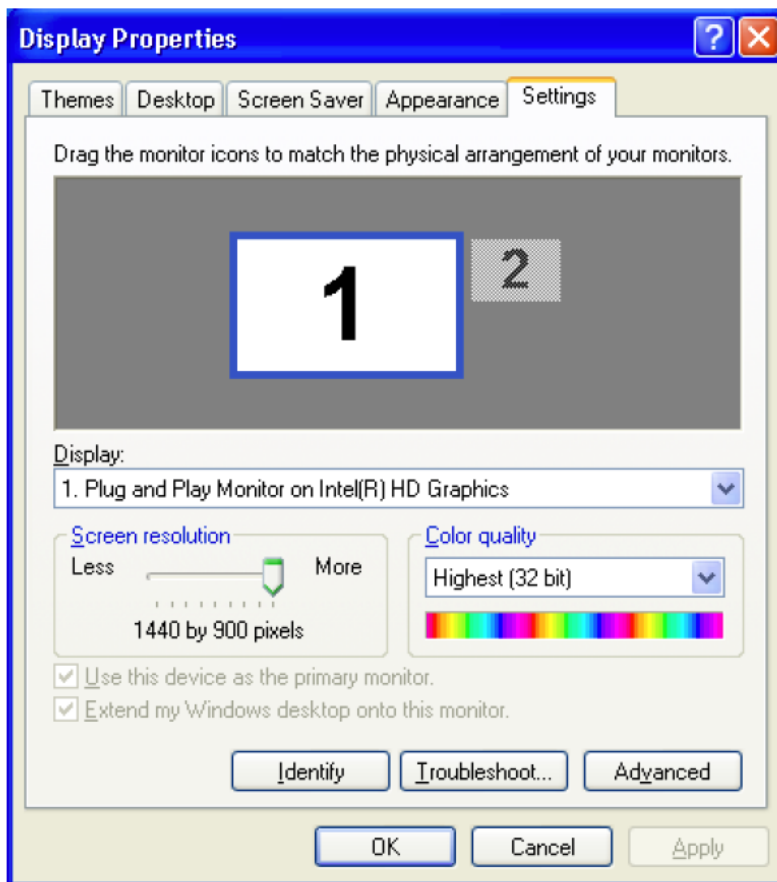
1. Right-click on the desktop and then select Properties.

**Example: Desktop Menu Displayed After Right-Click**



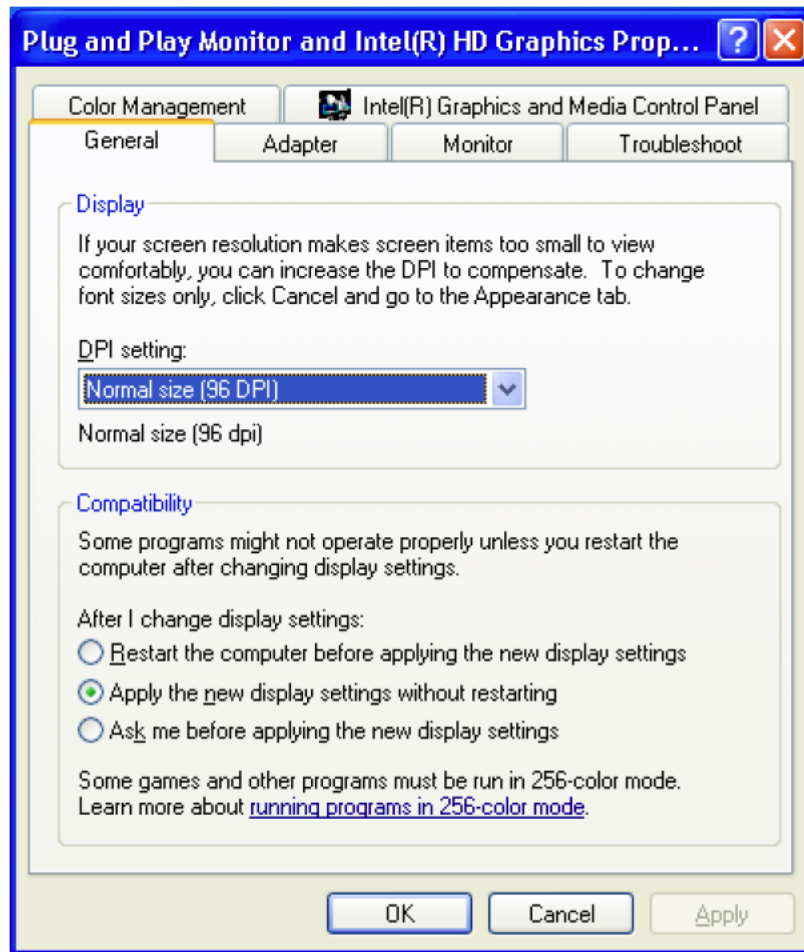
2. On the Settings tab, click the **Advanced** button.

**Example: Setting tab on Properties Screen**



3. Select “Normal size (96 DPI)” from the DPI Setting dropdown box and then click **OK**.

**Example: Menu Displayed After Selecting Advanced button**



### 3 Before Using the Software

Event Capture must be setup by using the options in the Event Capture Management Menu before any data can be entered. Access to this menu should be restricted to the ADPAC and his or her designees. The Event Capture ADPAC should use the following steps as a guide for setting up the Event Capture software.

1. Use the *Location - Update Location Information* option to create an Event Capture location.

**Notes:**

- No further options are functional until an Event Capture location is created.
- The selected location must be in the INSTITUTION file (#4).
- A location must be created with this option before DSS Units can be established.

2. Contact each service for a list of its DSS Units, the names of its Event Capture users, and the DSS Units for which they will enter data, and for individual product resource tracking needs. Use the *DSS Unit - Add or Update DSS Units* option to establish DSS Units for each service.

**Note:**

- No further options are functional until the DSS Units are created.

3. Use the *Access by User - Grant Access to DSS Units by User* option to assign user access to specific DSS Units for the users identified in Step 2. Assign the ECALLU security key only to those users who should have access to all DSS units.

**Notes:**

- Users must have access to DSS Units before they can begin entering data.
- Use the *Access by User – Grant Access to DSS Units by User* option to remove user access for a specific DSS Unit, except for those users who have the ECALLU security key, which overrides user access removal.

4. Use the *Category - Add or Update Categories* option to create local categories before the user sets up Event Code screens. Creating local categories is optional.

**Helpful Hint:**

- After completion of this step, the *Category Report* option on the *Reports Menu* can be used to print a report of the site's local categories.

5. Use the *Procedure - Add or Update Local Procedures* option to enter new or edit existing local procedures to the EC NATIONAL PROCEDURE file (#725). Adding local procedures is optional.

**Helpful Hint:**

- Before starting this step, use the *National/Local Procedure Report* option on the *Reports Menu* to print a list of procedures with their associated CPT codes. This report can be quite lengthy if it includes national procedures, so it should be queued to print to a device during non-peak hours.

**Notes:**

- An associated CPT code must be entered to pass local procedures to PCE.
  - Use this option to edit, but not delete, existing local procedures and to select an associated CPT code if this workload data should be sent to PCE.
6. Use the *Event Code Screen - Add or Update Event Code Screens* option to:
    - Create an event code screen for each procedure tracked in the Event Capture software.
    - Enter or edit an active associated clinic for DSS Units that are marked to send data to PCE. If an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.
    - Enter or edit a procedure Synonym.
    - Enter or edit procedure Reason(s).
    - Enter or edit procedure default Volume.

**Note**

- A screen for the procedure must be created before it can be used for data entry.

7. Use the *Print Category and Procedure Summary (Report)* option on the *Reports Menu* to print the Event Code screens sorted by DSS Units.

*Helpful Hint*

- Data entry clerks might find the output generated by this report useful as a procedure reference guide.

8. Set up of Event Capture is complete. Services can now enter data using the *Data Entry* options and provide summary reports using the *Reports* options.

## 4 Logon

Access to Event Capture occurs through a desktop shortcut that will point to the installation location. Refer to the Installation Guide for Event Capture or ask the local support staff for assistance.

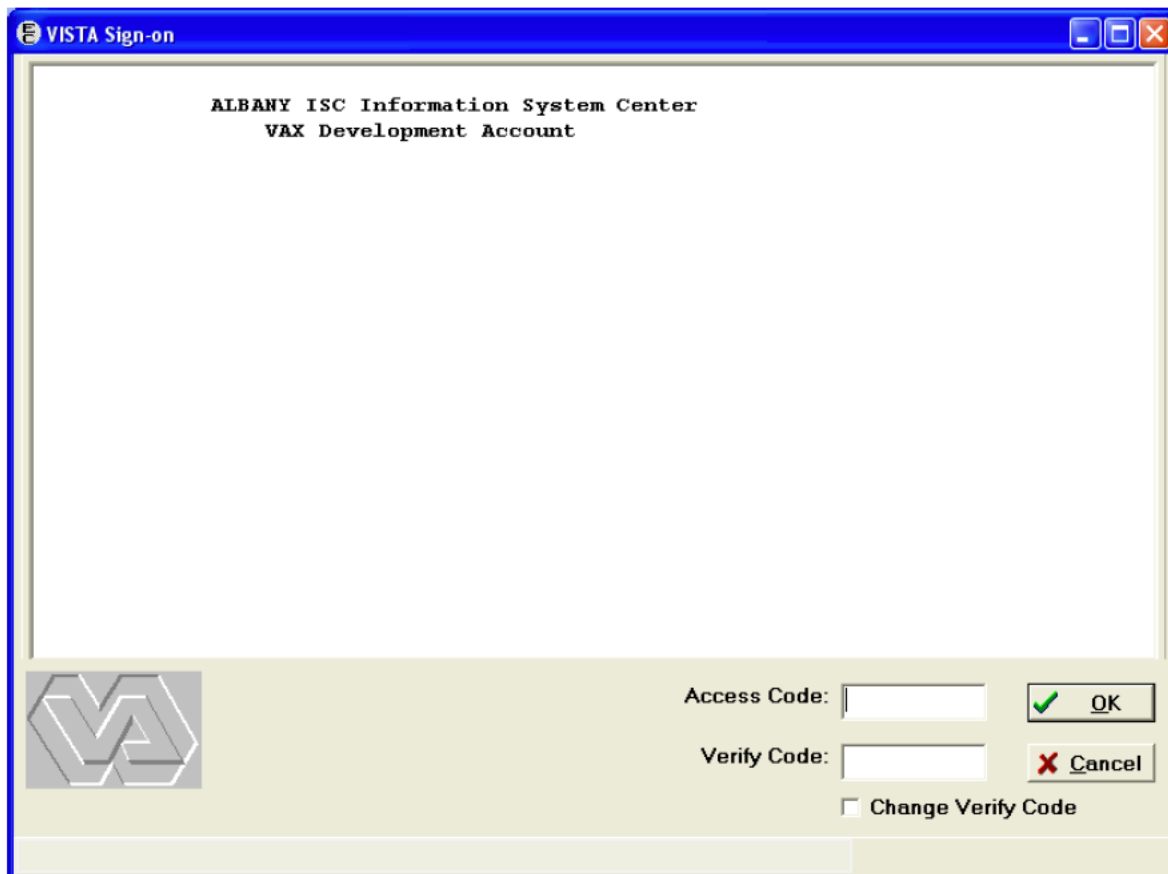
### Example: ECS GUI Icon



ECS GUI

The VistA Sign-on screen will display. Enter your VistA Access Code and Verify Code.

### Example: VISTA Sign-on Screen

A screenshot of a Windows-style dialog box titled "VISTA Sign-on". The window has a blue title bar with standard minimize, maximize, and close buttons. The main content area is white and contains the text "ALBANY ISC Information System Center" and "VAX Development Account" centered. At the bottom left is a logo consisting of a stylized 'V' and 'A' intertwined. At the bottom right, there are two input fields: "Access Code:" and "Verify Code:". To the right of the "Access Code:" field is a button with a green checkmark and the text "OK". To the right of the "Verify Code:" field is a button with a red 'X' and the text "Cancel". Below these buttons is a checkbox labeled "Change Verify Code".

VISTA Sign-on

ALBANY ISC Information System Center  
VAX Development Account

Access Code:

Verify Code:

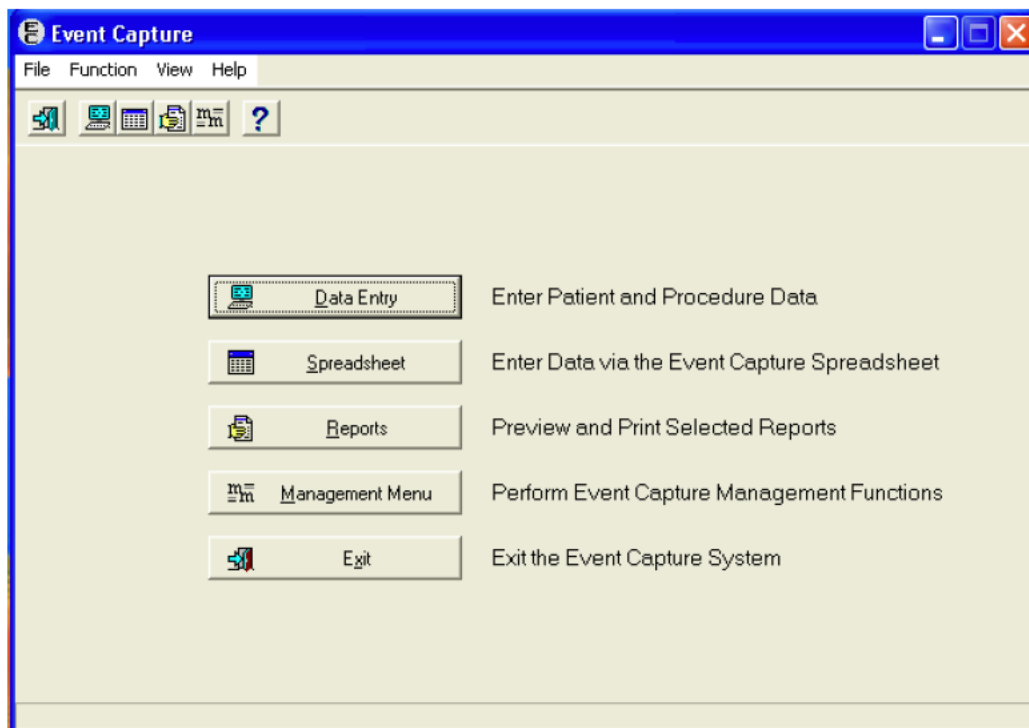
Change Verify Code

## 5 Event Capture Main Menu

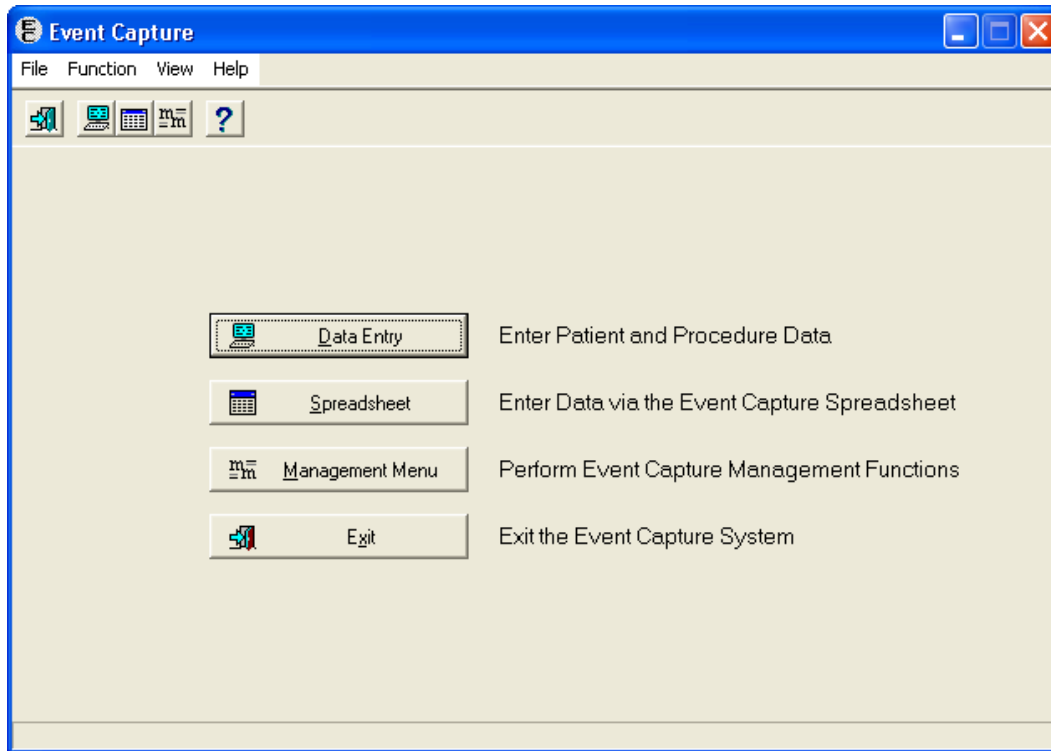
The Event Capture software contains four menus. The user must hold the appropriate security keys to have access to the *Spreadsheet* menu (ECSPSH) and to the *Management Menu* (ECMGR) and their options. To remove the *Reports* menu for a user, add the ECNORPT security key.

The following Main Menu options display when the Event Capture opens.

### Example: Main Menu for Event Capture

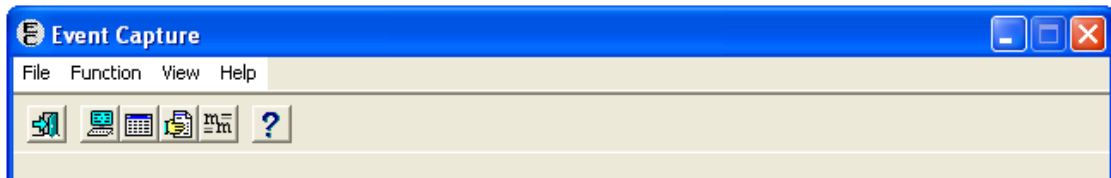







### Example: Main Menu with the ECNORPT Security Key Added for the User



## 5.1 Icon Shortcuts

There are ICON shortcuts to access options in Event Capture.

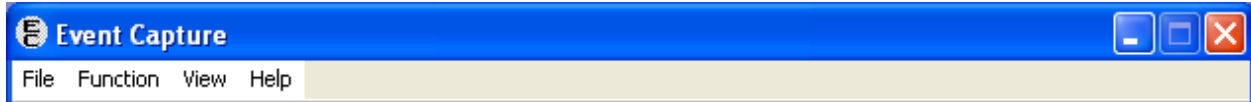


- |   |  |   |                                  |
|---|--|---|----------------------------------|
|  | <b>Close the Application</b>               |  | <b>Go to the Reports Menu</b>    |
|  | <b>Go to the Data Entry Menu</b>           |  | <b>Go to the Management Menu</b> |
|  | <b>Go to the Event Capture Spreadsheet</b> |  | <b>Display Screen Help</b>       |

## 5.2 Menu Bar

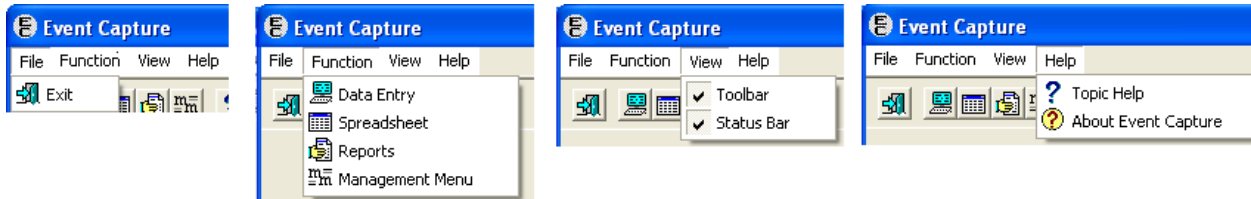
The Event Capture menu bar allows the user to access shortcut commands.

### Example: Main Menu Bar



The *File* menu allows you to *Exit* the window. The *Function* Menu on the Main window provides access to Data Entry, Spreadsheet, Reports and Management Menu functions. The *View* menu allows the user to show or hide the Toolbar and Status Bar. *Help* provides topic specific help or information about the Event Capture system.

### Example: Main Menu Bar with Menus Expanded

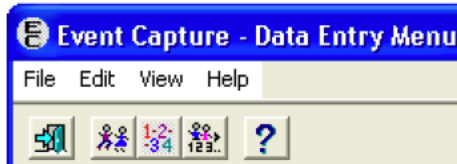




## 5.3 Menu Bar for Specific Functions

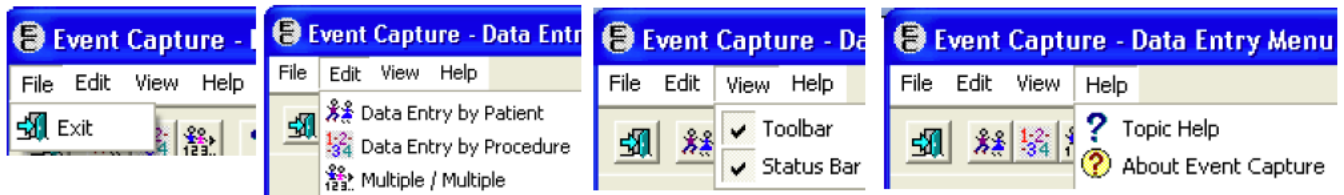
### 5.3.1 Data Entry Menu Bar

#### Example: Data Entry Menu Options



The *File* menu allows the user to *Exit* the window. The *Edit* Menu on the Main window provides access to *Data Entry by Patient*, *Data Entry by Procedure* and *Multiple/Multiple* functions. The *View* menu allows the user to show or hide the *Toolbar* and *Status Bar*. *Help* provides topic specific help or information about the Event Capture system.

#### Example: Data Entry Menu with Menus Expanded



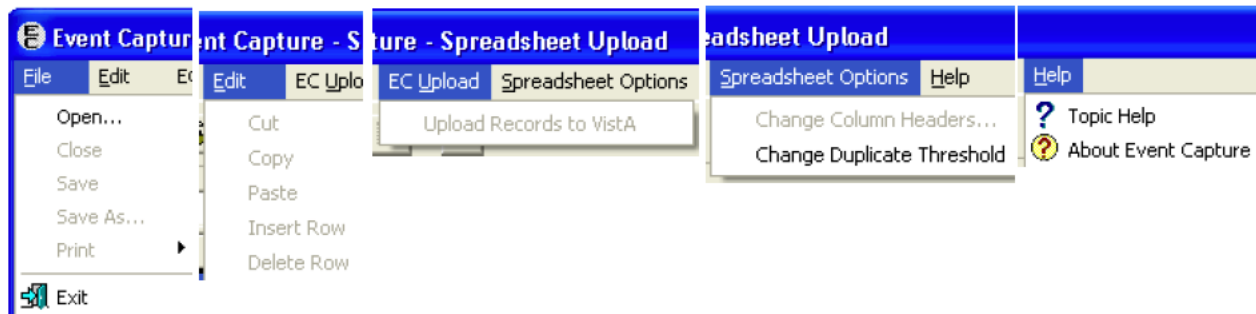
### 5.3.2 Spreadsheet Menu Bar

#### Example: Spreadsheet Upload Options



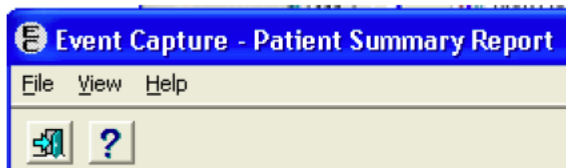
The *File* menu allows the user to *Exit* the window as well as *Open*, *Close*, *Save*, *Save As* and *Print* a file. The *Edit* Menu on the Main window provides access to *Cut*, *Copy*, *Paste*, *Insert Row* and *Delete Row* functions. The *EC Upload* menu allows the user to *Upload Records* to *VistA*. The *Spreadsheet Options* menu allows the user to *Change Column Headers* or *Change Duplicate Threshold*. *Help* provides topic specific help or information about the Event Capture system.

**Example: Spreadsheet Menu with Menus Expanded**



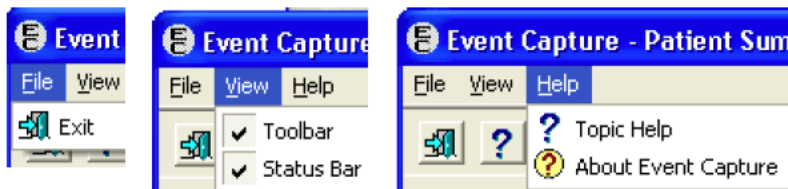
**5.3.3 Reports Menu Bar**

**Example: Reports Menu Bar**



The *File* menu allows the user to *Exit* the window. The *View* menu allows the user to show or hide the Toolbar and Status Bar. *Help* provides topic specific help or information about the Event Capture system.

**Example: Reports Menu with Menus Expanded**



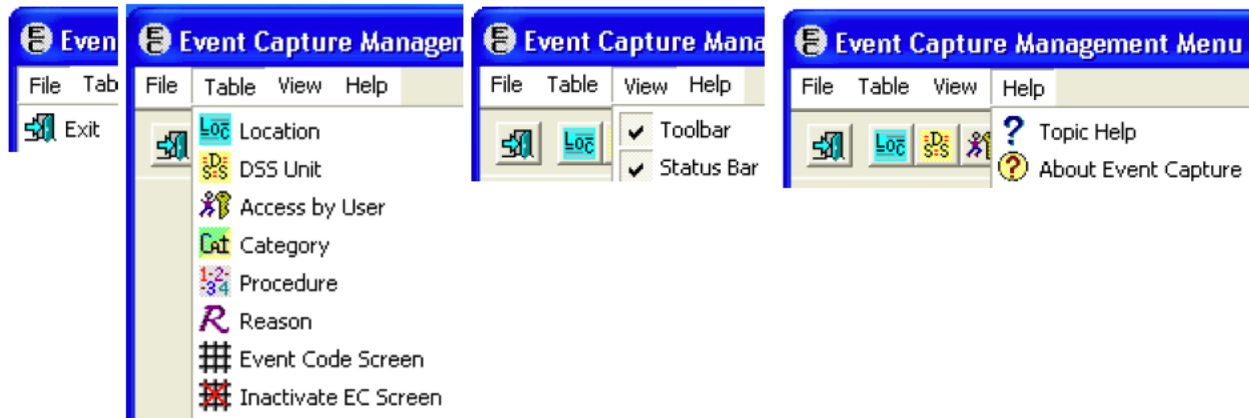
**5.3.4 Management Menu Bars**

**Example: Management Menu Options**



The *File* menu allows the user to *Exit* the window. The *Table* Menu on the Main window provides access to *Location*, *DSS Unit*, *Access by User*, *Category*, *Procedure*, *Reason*, *Event Code Screen* and *Inactivate EC Screen* functions. The *View* menu allows the user to show or hide the *Toolbar* and *Status Bar*. *Help* provides topic specific help or information about the Event Capture system.

### Example: Management Menu with Menus Expanded



## 5.4 Default Location to all Enter/Edit Screens

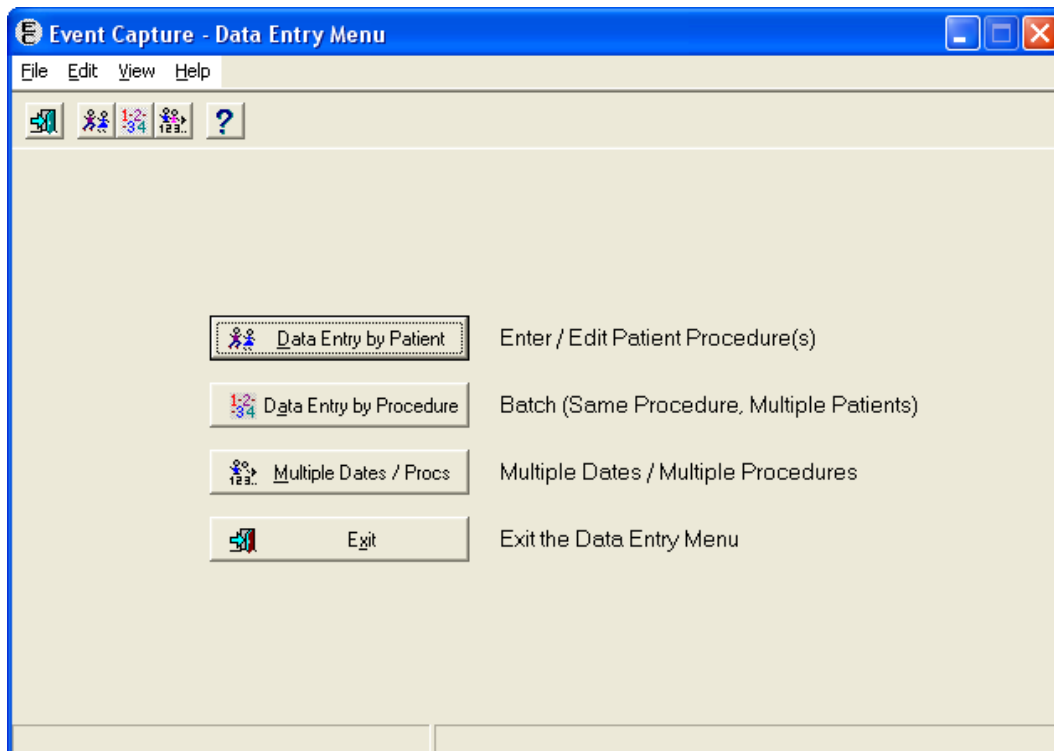
On all Event Capture screens, the previous Location entry will be “saved” and used as the default on subsequent Location fields.

## 6 Data Entry Menu

The *Data Entry* menu offers the following options:

- *Data Entry by Patient* – Enter/Edit Patient Procedures
- *Data Entry by Procedure* – Batch (Same Procedure, Multiple Procedures)
- *Multiple Dates/Procs* – Multiple Dates / Multiple Procedures

### Example: Data Entry Menu Screen



## 6.1 Data Entry by Patient

### 6.1.1 Before the User Starts

Use this option to:

- Enter a single procedure for **one** patient
- Enter multiple procedures for **one** patient
- Edit an existing patient procedure
- Delete an existing patient procedure

Event Code screens must be defined before entering any Event Capture data.

### 6.1.2 What the User Will See

- A summary screen to identify the Location, DSS Unit, Procedure Date Range, Patient Identifier and the Procedures for that patient
- A Detail screen to show the detailed information about a selected procedure

#### Example: Summary Screen for Enter/Edit Patient Procedures

Event Capture - Enter/Edit Patient Procedures

File Edit Sort View Help

Location: DAYTON DSS Unit:

Date Range View of Patient's Recorded Procedures

Procedures From: 01 FEB 2011 Procedures Through: 01 FEB 2012

Patient Identifier

Search

Categ...	Procedure Name	Date and Time	Volume	Associated Cli...	Ordering Secti...	Primary Diagnosis	Primar...
----------	----------------	---------------	--------	-------------------	-------------------	-------------------	-----------

Close Add Update Delete Topic Help

### 6.1.3 Instructions for Enter/Edit Patient Procedures Screen

#### 1. Select a Location.

- If there is only **one** Location set up for the Event Capture System, the Location on the screen will default to that value.
- If there is **more than one** Event Capture Location set up, the Location will default to the last Location used. To change the Location, choose a Location from the dropdown list of available Event Capture Locations.

#### 2. Select a DSS Unit.

- If **one** DSS Unit is defined in the Event Capture *Management Menu* for DSS Unit, or if only one DSS Unit is assigned to the user, that DSS Unit value will default.
- If **more than one** DSS Unit is defined, a default will not be assigned. Choose a DSS Unit from a dropdown list of accessible DSS Units.
- The user can add, edit or delete any patient procedure for the selected DSS Unit.
- To gain access to a DSS Unit, go the *Management Menu* and choose the *DSS Unit - Add or Update DSS Units* function to add the unit to the dropdown list. (**Note:** The ECMGR key is required)

#### 3. Select a Date Range.

- The Procedure Date Range (from/through) will default to the system date. These fields may be edited by typing in a date (dd mmm yyyy) or by using the calendar dropdown.

**Note:** An edit check will prevent selecting a date in the future or selecting Procedures From date that is later than the Procedures Through date.

#### Example: Calendar Dropdown for Date Range View


Date Range View of Patient's Recorded Procedures

Procedures From: 01 FEB 2012 Procedures Through: 01 FEB 2012


Patient Identifier:

February, 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	1	2	3
4	5	6	7	8	9	10

Search 

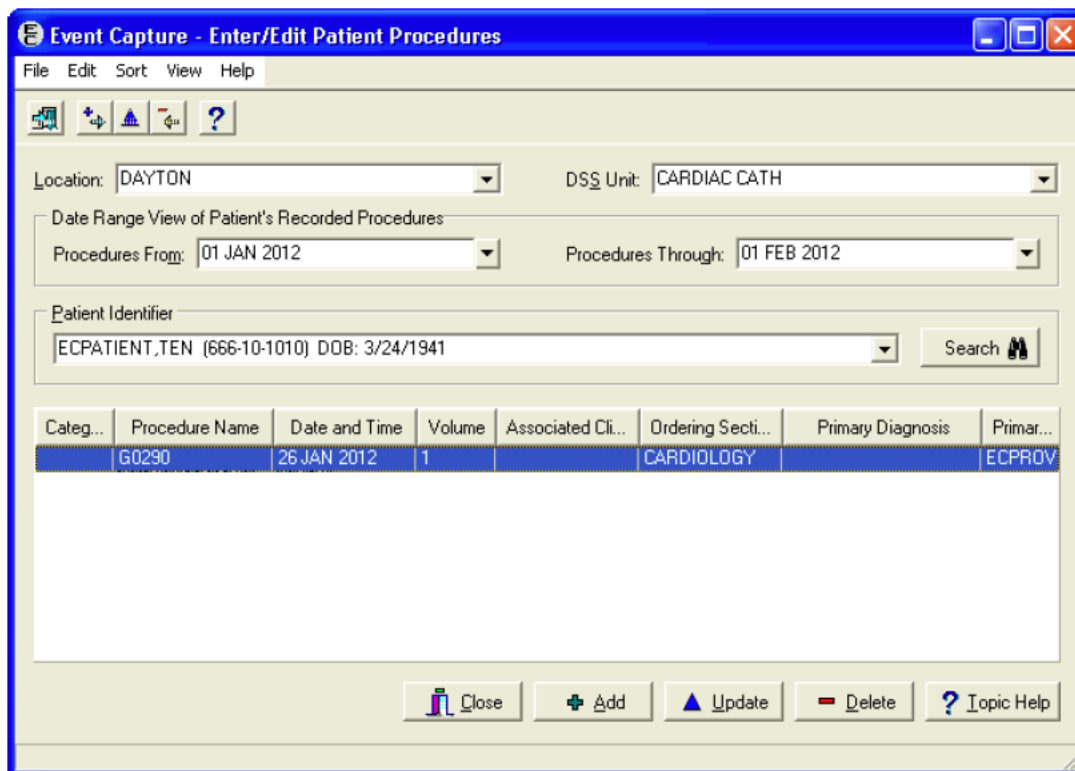
Categ...	Procedu	Associated Cli...	Ordering Secti...	Primary Diagnosis	Primar...

4. Use the Patient Identifier field to select a patient.
  - Enter one of the following:
    - Patient Name (whole or partial, last name first)
    - Social Security Number
    - Last four digits of the Patient Social Security Number
    - First character of Last Name plus the last four digits of the SSN with no spaces
  - Press <Enter> or the Search button. 
  - Choose from the list of patients displayed.
5. Once the previous steps are complete, the bottom section of the window will display the Procedure History in chronological order for the selected patient at the selected DSS Unit for the date range specified. The Procedure History will display the Category, Procedure, Date/Time, Volume, Associated Clinic, Ordering Section, Primary Diagnosis and Primary Provider.

**Note:** Click on the field header to sort the data in a different order.

**Note:** All buttons at the bottom of the screen (Close, Add, Update, Delete and Topic Help) are active.

### Example: Procedure History for Sample Patient



Event Capture - Enter/Edit Patient Procedures

File Edit Sort View Help

Location: DAYTON DSS Unit: CARDIAC CATH


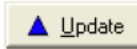

Date Range View of Patient's Recorded Procedures  
 Procedures From: 01 JAN 2012 Procedures Through: 01 FEB 2012

Patient Identifier  
 ECPATIENT.TEN (666-10-1010) DOB: 3/24/1941 Search


Categ...	Procedure Name	Date and Time	Volume	Associated Cli...	Ordering Secti...	Primary Diagnosis	Primar...
G0290		26 JAN 2012	1		CARDIOLOGY		ECPROV

Close Add Update Delete Topic Help

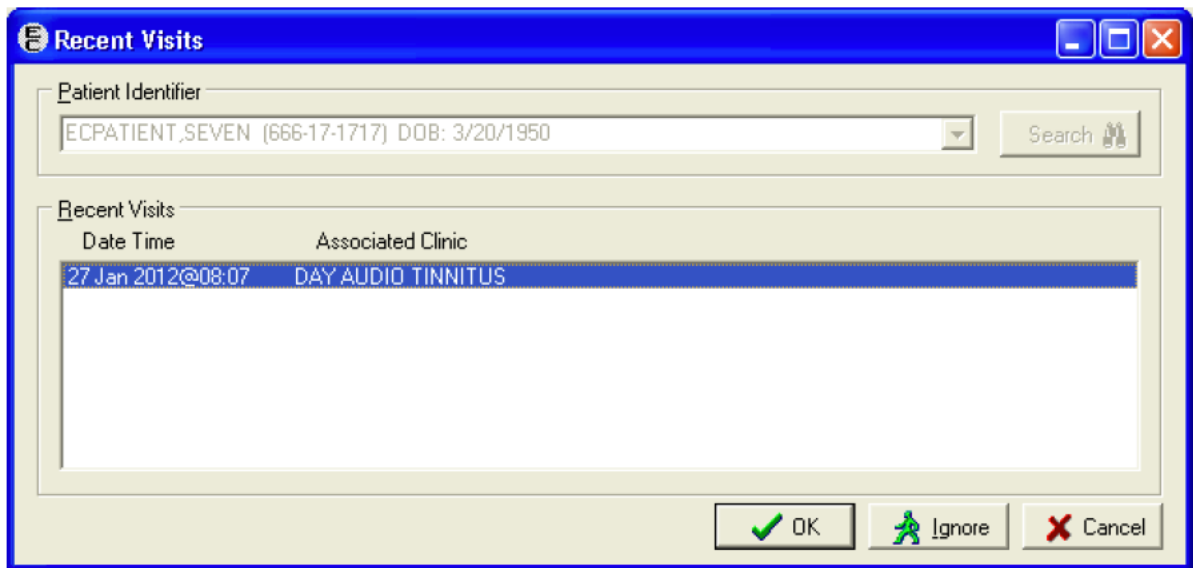
**Note:** Clicking on a previously entered Procedure, shown on the lower half of the Enter/Edit Patient Procedure screen, will highlight the procedure and activate the Update and Delete buttons.

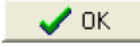
6. Click the **Add** button  to do data entry.
7. Click the **Update** button  to display the procedure on the Edit Patient Procedure (Detail) screen.
8. Click the **Delete** button  to delete the procedure from patient's record.

### 6.1.4 Recent Visits Pop-up Screen

1. Click the **Add** button  to do data entry. The Recent Visits pop-up screen will display.

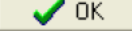
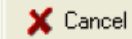
#### Example: Recent Visits Screen



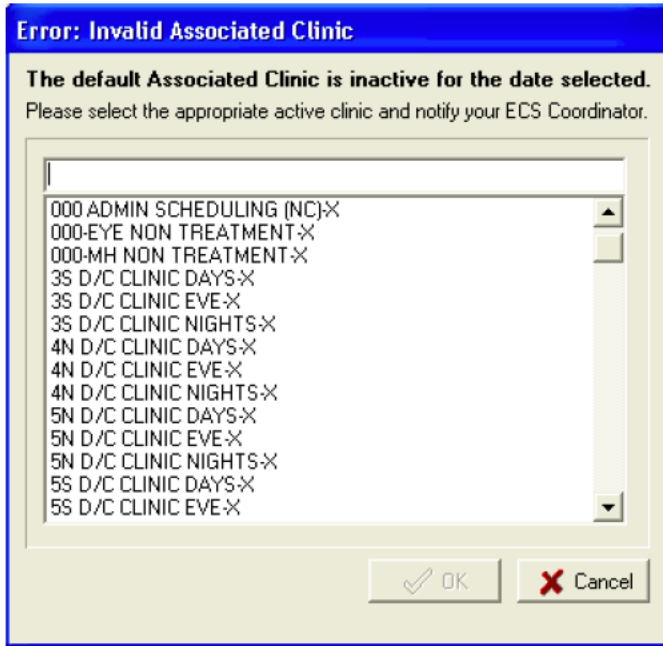
2. On the Recent Visits pop-up box, take one of three options:
  - a. Select the appropriate Appointment/Encounter from the Recent Visits. Click **OK**  to close the pop-up box. The Add Patient Procedure screen will display, which will have the Procedure Date/Time and Associated Clinic populated and locked, based on the Appointment/Encounter selected on the Recent Visits pop-up box. Enter the procedure(s), answer classification questions as they pertain to that visit if not grayed out, and enter diagnoses, provider, and other pertinent fields if required (reasons, ordering section and/or modifiers).

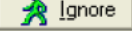
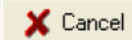
**Note:** If the Associated Clinic for the record is no longer active, the Error: Invalid Associated Clinic pop-up will appear. The pop-up only lists active associated clinics. To



update the record, select an active clinic from the list and then **OK** . Select **Cancel**  to open the record and Associated Clinic will be blank.

### Example: Invalid Associated Clinic Pop-up



- b. Click **Ignore**  on the Recent Visits pop-up to go to unfilled Add Patient Procedure screen to enter detail for all fields.
- c. Click **Cancel**  to close the Recent Visits pop-up and stay at the Enter/Edit Patient Procedure screen.

**Example: Add Patient Procedure (or Edit Patient Procedure) Detail Screen**

**Event Capture - Add Patient Procedure [ECPATIENT,TEN (666-10-1010) DOB: 3/24/1941]**

Location: DAYTON DSS Unit: CARDIAC CATH Category: No Categories

Procedure Date & Time: 01 FEB 2012 @1540 Status: Outpatient Eligibility Code: Procedure Name: Volume: 1

Modifiers Available: [Empty] Include Exclude Modifiers Selected: [Empty]

Reasons: 1: [Empty] 2: [Empty] 3: [Empty]

Service Connected? [Empty] Combat Veteran? [Empty] Agent Orange? [Empty] Ionizing Radiation? [Empty] SW Asia Conditions? [Empty] Military Sexual Trauma? [Empty] Head/Neck Cancer? [Empty] Project 112/SHAD? [Empty]

Ordering Section: [Empty]

Diagnoses: Primary: [Empty] Secondary Dx 1: [Empty] Secondary Dx 2: [Empty] Secondary Dx 3: [Empty] Secondary Dx 4: [Empty]

Associated Clinic: [Empty]


Providers Available: ECPROVIDER,EIGHTEEN Allopathic and Osteopathic Physicians Resident Include Exclude ECPROVIDER,ELEVEN Allopathic and Osteopathic Physicians Reside ECPROVIDER,FIFTEEN Allopathic and Osteopathic Physicians Resder

Providers Selected: [Empty]

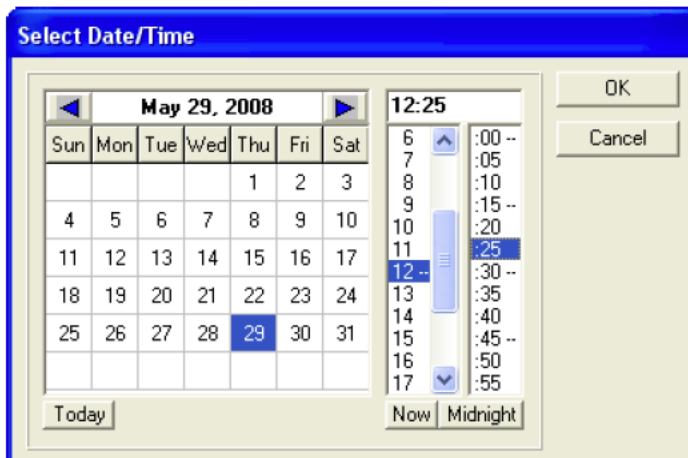
OK Cancel Add Help

### 6.1.5 Adding Information to the Add Patient Procedure or Edit Patient Procedure Screen

To complete the Add Patient Procedure or Edit Patient Procedure screen:

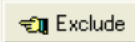
1. Select a Category
  - If only one category is defined for the specified DSS Unit, that category will default.
  - If the Allow Category field in the *Add DSS Unit Management* set up is set to NO, then Category field will be blank and disabled.
2. Select the Procedure Date and Time.
  - This information is complete if an appointment selection occurred on the Recent Visits pop-up.
  - Type “N” and then press <Enter> in the field instead of clicking the  button will bypass the pop-up or clicking **Now** on the pop-up will enter the current system date and time. When the **Midnight** button is clicked, “23:59” is displayed for the time on the date selected.

#### Example: Select Date/Time Pop-up



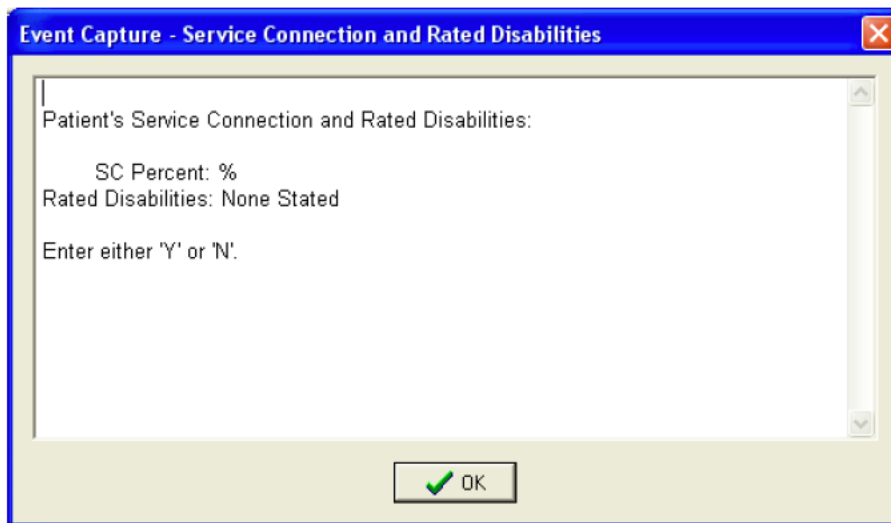
3. Select an Eligibility Code for this procedure.
  - If the selected patient has only one Eligibility Code, that value defaults. Otherwise, select the Eligibility Code that applies to this procedure.
  - The primary Eligibility Code displays as the default.
4. Select a Procedure Name.
  - Select a procedure from the dropdown list.
5. Enter the Volume for the procedure.
6. If applicable, the CPT Modifiers section will be active.
  - Modifiers provide additional information about a CPT procedure. With functionality put in place by the Code Set Versioning project, only CPT modifiers that are active for the date and time of the event will show.


- Choose a Modifier from the Modifiers Available list and click **Include**.
- Repeat as needed.
- To remove a modifier, choose it from the Modifiers Selected list and click **Exclude**.


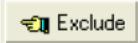
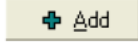
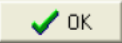



- Press <CTL-Click> to select multiple Modifiers at one time.
7. If applicable, the Reasons field will be active.
    - The user can enter up to three reasons.
    - Reason #1 must be entered before a second or third may be entered. Reason #2 must be entered before a third may be entered.
    - Reasons appear alphabetically in the dropdown.
    - A reason will not appear in the dropdown list for remaining reason fields as an option once selected.
    - A reason can be selected by entering the initial letter(s) into the Reasons field. If the reason that appears is not the correct choice, click the down arrow on the reason dropdown to select another reason or enter different letter(s).
  8. If applicable, the mandatory classification questions section will be active.
    - Select **YES** only if the treatment received relates to that classification.
    - Press <F1> while in the Service-Connected field will open a pop-up window displaying the patient's service connection and any rated disabilities.

### Example: Service Connection and Rated Disabilities Screen



9. Select the Ordering Section.
10. Select the associated ICD-9 diagnosis codes for the procedure.
  - Use the Primary field to enter one of the following:
    - ICD-9 code (whole or partial)
    - Diagnosis Name (whole or partial)
  - Press the Search button. 

- Select from the resulting dropdown list.
  - Repeat as needed to select the Secondary Diagnosis Codes.
11. Select the Associated Clinic (if not already populated from Recent Visits pop-up).
  12. Select the providers of the services.  
Use the Providers Available text box to enter the following:
    - Provider name (full or partial, last name first)
    - Select the provider from the resulting dropdown list and click **Include**. 
    - To remove a provider, select from the Providers Selected list and click **Exclude**. 
  13. Click the **Add** button  to save the edited procedure.
  14. Click the **OK** button  to save the edited procedure and return to the Enter Patient Procedure screen.
  15. Click the **Cancel** button  to return to the Enter Patient Procedure screen without saving the above entries.

#### Notes

- If the record transmits to PCE based on the *DSS Unit on Management Menu* set up, then all fields will be required.
- If the record does not transmit to PCE based on the *DSS Unit on Management Menu* set up, then the Associated Clinic and the four Secondary Diagnosis fields will be disabled.
- Press <F1> while in any field to open a pop-up window displaying a Help message.

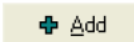

## 6.1.6 Add a Patient Procedure

The following instructions and example assume that a user is entering a **new procedure** for a specified patient and that the specified DSS Unit data transmits to PCE.

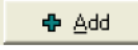
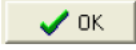
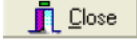
### Instructions to Add a Patient Procedure

1. On the Main Menu, select *Data Entry*.
2. On the *Data Entry Menu*, select *Entry by Patient*.
3. The Edit Patient Procedures screen appears.
4. Select the Location and DSS Unit.
5. Allow Procedure Date Range to default to today.
6. Select a Patient.

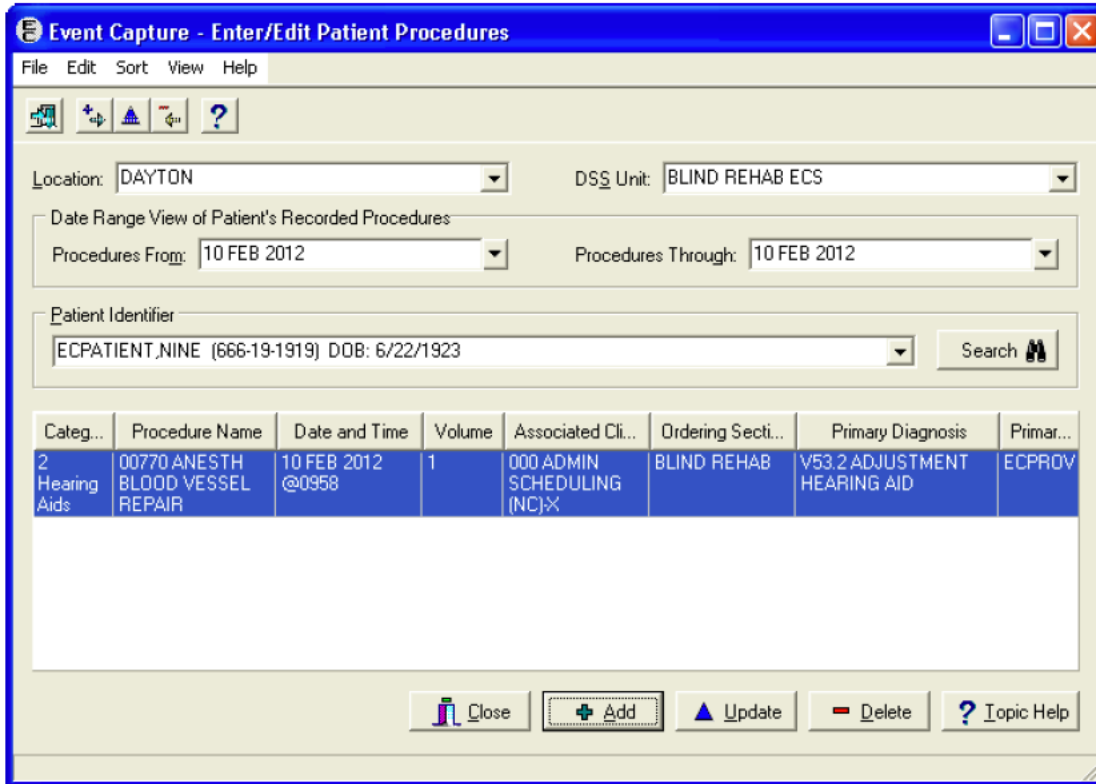
### Example: Edit Patient Procedure Summary Screen

7. Click **Add**. 
8. The Recent Visits screen will appear. Click **Ignore**. 

**Example: Add Patient Procedure Detail Screen**

9. Complete the procedure related fields on the Add Patient Procedure detail screen according to the field-by-field instructions given earlier.
10. Click **Add**  to save the Detail entries and open another Detail screen for this patient.
11. Click **OK**  to save the Detail entries and return to the Enter/Edit Patient Procedures screen.
12. The Enter/Edit Patient Procedures screen will display the procedure(s) entered for this patient.
13. Click **Close**  to return to the *Data Entry* menu.

**Example: Enter/Edit Patient Procedures with New Procedure Added**



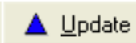


## 6.1.7 Edit a Patient Procedure

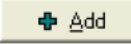
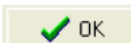

### To edit an existing patient procedure

1. On the Main Menu, select *Data Entry*.
2. On the Data Entry Menu, select *Entry by Patient*.
3. The Enter/Edit Patient Procedures screen appears.

### Example: Enter/Edit Patient Procedures Summary Screen

4. Select the Location and DSS Unit.
5. Enter a Procedure Date Range by using the calendar dropdowns. The default is today.
6. Select a Patient.
7. The lower portion of the screen will display the procedure(s) for the selected patient and the DSS Unit within the date range.
8. Choose a procedure and click **Update**. 
9. The Edit Patient Procedure screen appears.

**Example: Edit Patient Procedure Screen**


10. Complete the procedure related fields on the Edit Patient Procedure detail screen according to the field-by-field instructions given earlier.
11. Click **Add**  to save the detail entries and open another detail screen for this patient.
12. Click **OK**  to save the detail entries and return to the Enter/Edit Patient Procedures screen.
13. The Enter/Edit Patient Procedures screen will display the procedure(s) entered for this patient.
14. Click **Close**  to return to the *Data Entry* menu.

## 6.1.8 Delete a Patient Procedure

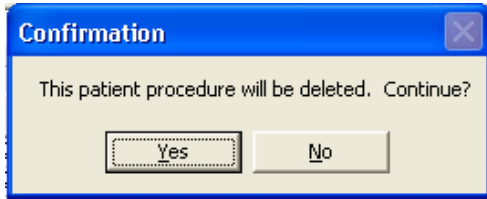
### To delete an existing patient procedure

1. On the Main Menu, select *Data Entry*.
2. On the Data Entry Menu, select *Entry by Patient*.
3. The Enter/Edit Patient Procedures screen appears.

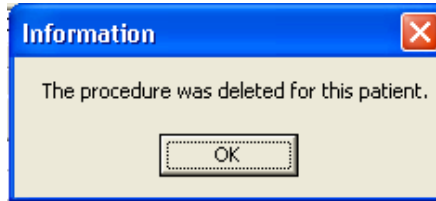
Categ...	Procedure Name	Date and Time	Volume	Associated Cli...	Ordering Secti...	Primary Diagnosis	Primar...
	93505 BIOPSY OF	26 JAN 2012	1		CARDIOLOGY		ECPROV

4. Select the Location and DSS Unit.
5. Enter a Procedure Date Range by using the calendar dropdowns. The default is today.
6. Select a patient.
7. The lower portion of the screen will display the procedure(s) for the selected patient and the DSS Unit within the date range.
8. Choose a procedure and click Delete. 
9. A confirmation message appears.
  - Click **Yes** and a pop-up appears to show the selected procedure was deleted for the patient. Click **OK** to return to the Enter/Edit Patient Procedures screen.
  - Click **No** to return to the Enter/Edit Patient Procedures screen.

**Example: Confirmation Message**

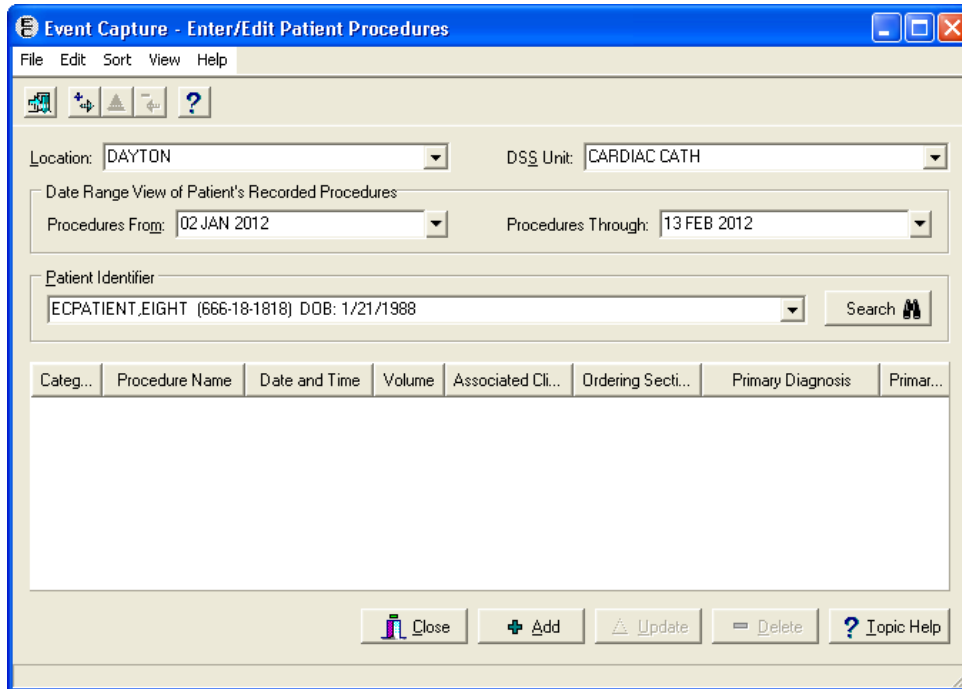



**Example: Procedure Deleted Pop-up**



10. The screen will now refresh to show the remaining procedures entered for this patient.

**Example: Enter/Edit Patient Procedures Screen with Procedure Deleted**




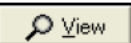
11. Click Close  to return to the *Data Entry* menu.

## 6.2 Data Entry by Procedure

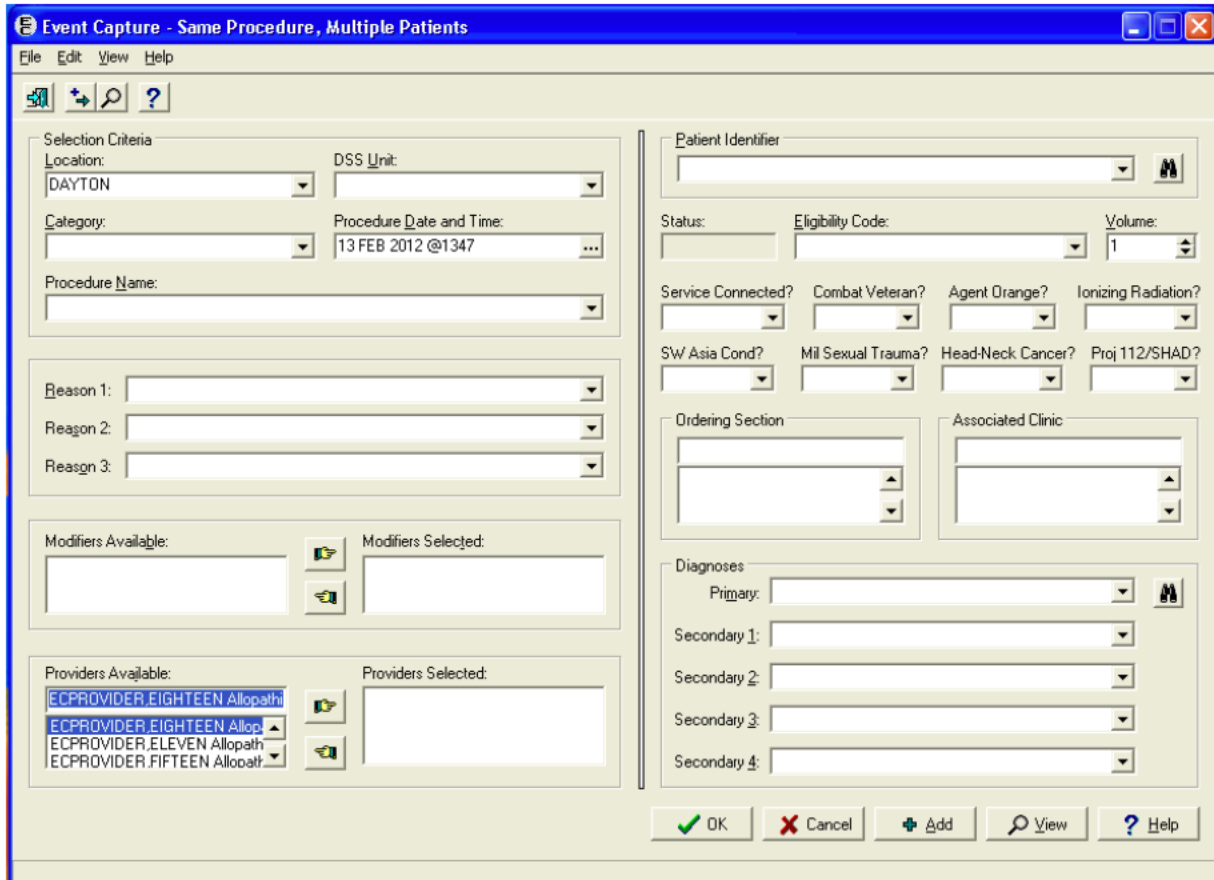
### 6.2.1 Before the User Starts

- Enter / edit the same procedure for multiple patients
- Event Code screens must be defined before entering any Event Capture data.
- Use the *Data Entry by Patient* option to make corrections to erroneous patient data.

### 6.2.2 What the User Will See

- The left half of the screen contains information for the procedure that the user will add for each patient.  
**Note:** The user will enter the procedure information only one time.
- The right half of the screen identifies each patient. The user will complete this section for each patient. Click **Add**  to get a refreshed screen for the next patient.
- The **View**  button displays a listing of all patients entered for this procedure in this session.


#### Example: Same Procedure, Multiple Patients Screen



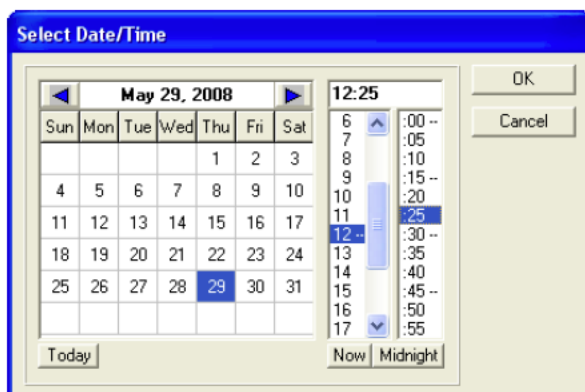
The screenshot shows the 'Event Capture - Same Procedure, Multiple Patients' window. The interface is split into two main columns. The left column is for procedure selection, including 'Selection Criteria' (Location: DAYTON, DSS Unit, Category, Procedure Date and Time: 13 FEB 2012 @1347, Procedure Name), 'Reason 1-3' dropdowns, 'Modifiers Available/Selected', and 'Providers Available/Selected'. The right column is for patient identification, including 'Patient Identifier', 'Status', 'Eligibility Code', 'Volume', and various checkboxes for service status (Service Connected?, Combat Veteran?, Agent Orange?, Ionizing Radiation?, SW Asia Cond?, Mil Sexual Trauma?, Head-Neck Cancer?, Proj 112/SHAD?). Below these are 'Ordering Section' and 'Associated Clinic' fields, and 'Diagnoses' (Primary, Secondary 1-4). The bottom of the window features buttons for OK, Cancel, Add, View, and Help.



### 6.2.3 Instructions for Adding a Procedure for Multiple Patients

The following instructions and example assume that the user wants the specified DSS Unit to send data to PCE.




1. Select a Location.
  - If there is only **one** Location set up for the Event Capture System, the Location on the screen will default to that value.
  - If there is **more than one** Event Capture Location set up, the Location will default to the last Location used. To change the Location, choose a Location from the dropdown list of available Event Capture Locations.
2. Select a DSS Unit.
  - If **one** DSS Unit is defined in the Event Capture *Management Menu* for DSS Unit, or if only one DSS Unit is assigned to the user, that DSS Unit value will default.
  - If **more than one** DSS Unit is defined, a default will not be assigned. Choose a DSS Unit from a dropdown list of accessible DSS Units.
  - The user can add, edit or delete any patient procedure for the selected DSS Unit.
  - To gain access to a DSS Unit, go the *Management Menu* and choose the *DSS Unit - Add or Update DSS Units* function to add the unit to the dropdown list.
3. Select a Category.
  - If only one category is defined for the specified DSS Unit, that category will be the default.
4. Select the Procedure Date and Time.
  - Type “N” and then press <Enter> in the field instead of clicking the  button will bypass the pop-up or clicking **Now** on the pop-up will enter the current system date and time. When the **Midnight** button is clicked, “23:59” is displayed for the time on the date selected.

#### Example: Select Date/Time Pop-up



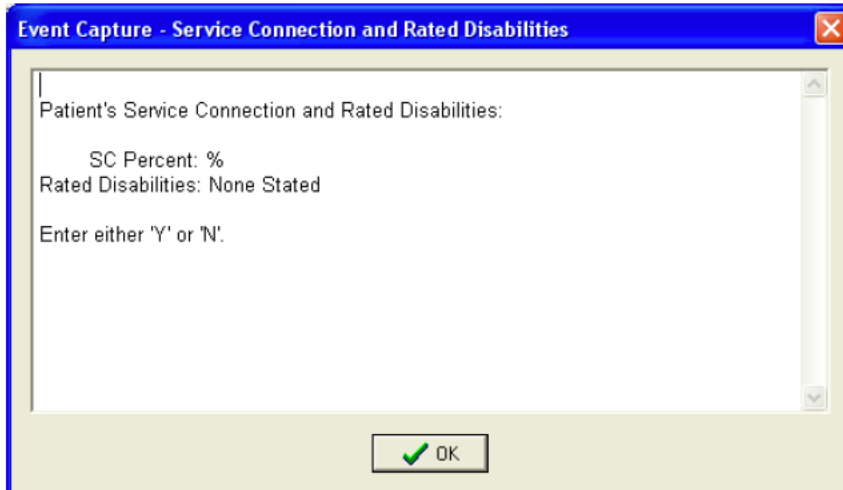
5. Select a Procedure Name.
  - Select a procedure from dropdown list.
6. If applicable, the Reasons field will be active.
  - The user can enter up to three reasons.
  - Reason #1 must be entered before a second or third may be entered. Reason #2 must be entered before a third may be entered.
  - Reasons appear alphabetically in the dropdown.
  - A reason will not appear in the dropdown list for remaining reason fields as an option once selected.
  - A reason can be selected by entering the initial letter(s) into the Reasons field. If the reason that appears is not the correct choice, click the down arrow on the reason dropdown to select another reason or enter different letter(s).
7. If applicable, the CPT Modifiers section will be active.
  - Modifiers provide additional information about a CPT procedure. With functionality put in place by the Code Set Versioning project, only CPT modifiers that are active for the date and time of the event will show.
  - Choose a Modifier from the Modifiers Available list and click . Repeat as needed.
  - To remove a modifier, choose it from the Modifiers Selected list and click .
  - Press <CTL-Click> to select multiple Modifiers at one time.
8. Select the providers of the services.
 


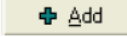
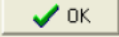
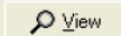
Use the Providers Available text box to enter the following:

  - Provider name (full or partial, last name first)
  - Select the provider from the resulting dropdown list and click .
  - To remove a provider, select from the Providers Selected list and click .
9. Use the Patient Identifier field to select a patient.
  - Enter one of the following:
    - Patient Name (whole or partial, last name first)
    - Social Security Number
    - Last four digits of the Patient Social Security Number
    - First character of Last Name plus the last four digits of the SSN with no spaces
  - Press <Enter> or the Search button. 
  - Choose from the list of patients displayed.
10. Select an Eligibility Code for this procedure.
  - If the selected patient has only one Eligibility Code, that value defaults. Otherwise, select the Eligibility Code that applies to this procedure.
  - The primary Eligibility Code displays as the default.

11. Enter the Volume for the procedure.
12. If applicable, the mandatory classification questions section will be active.
  - Select **YES** only if the treatment received relates to that classification.
  - Press <F1> while in the Service-Connected field will open a pop-up window displaying the patient's service connection and any rated disabilities.

### Example: Service Connection and Rated Disabilities Screen



13. Select the Ordering Section.
14. Select an Associated Clinic for the specified DSS Unit, if applicable.
15. Select the associated ICD-9 diagnosis codes for the procedure.
  - Use the Primary field to enter one of the following:
    - ICD-9 code (whole or partial)
    - Diagnosis Name (whole or partial)
  - Press the Search button. 
  - Select from the resulting dropdown list.
  - Repeat as needed to select the Secondary Diagnosis Codes.
16. Click the **Add**  button to add this procedure for the patient. The right side of the screen will reset to enter this procedure for another patient. Select the next patient for this procedure. Repeat the patient related steps above.
17. Click the **OK**  button to add this procedure to the patient's record and return to the *Data Entry* menu.
18. Click the **View**  button to verify that the list of patients entered is correct. The following screen will list all of the patients entered for the procedure that you selected.



**Example: View Patients for this Procedure Screen**

Event Capture - View Patients for this Procedure

Location: DAYTON      DSS Unit: DIABETIC ECS  
 Category: No Categories      Procedure: NU003 STATUS MILD [NOT DEFINED]

Patient Name	Date and Time	Primary Diagnosis	Ordering Section	Associated Clinic
ECPATIENT.FIVE	FEB 13,2012@13:53	289.0 SECONDARY POLYCYTHEMIA	MEDICINE	3S D/C CLINIC EVE-X
ECPATIENT.SIX	FEB 13,2012@13:53	V77.99 OTH UNSPEC DISORDERS	METABOLIC	3S D/C CLINIC EVE-X
ECPATIENT.SEVEN	FEB 13,2012@13:53	V58.89 OTH SPEC AFTERCARE	NEPHROLOGY	3S D/C CLINIC EVE-X

OK

19. To correct an entry, return to the *Data Entry* menu and select *Data Entry by Patient*.

## 6.3 Multiple Dates / Procedures

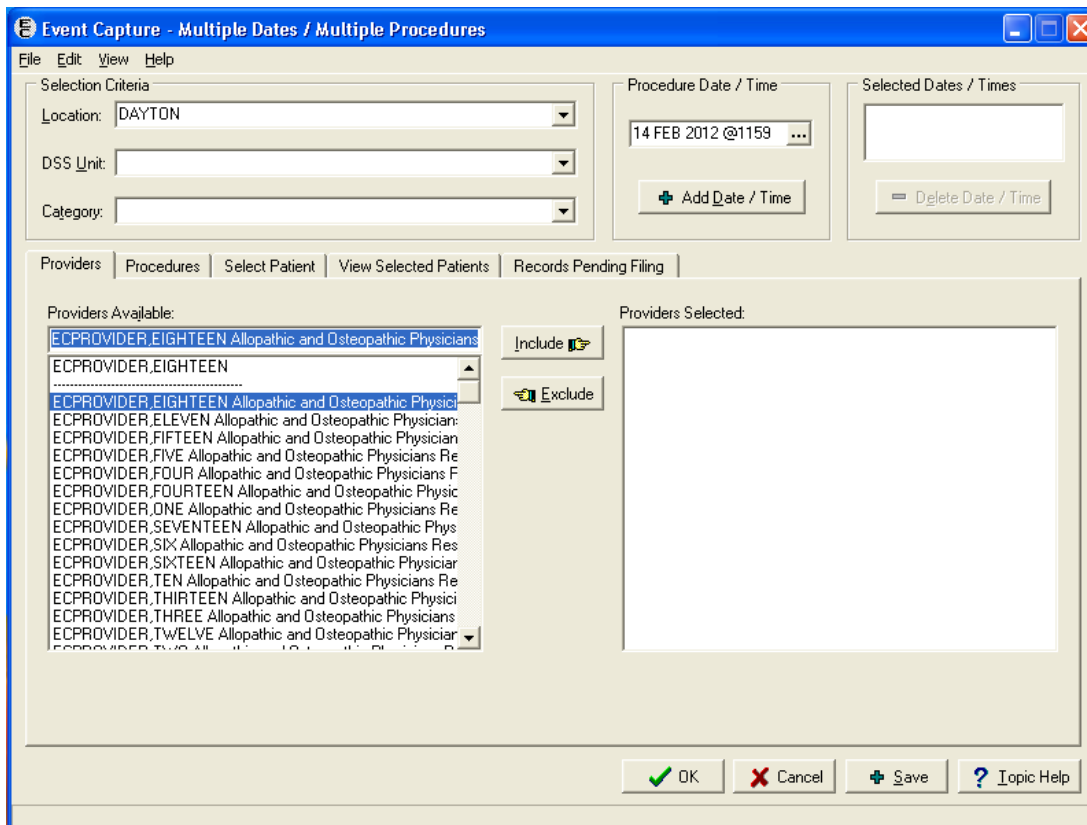
### 6.3.1 Before the User Starts

- Add multiple dates and multiple patients for multiple procedures
- Event Code screens must be defined before entering any Event Capture data.
- Use the *Data Entry by Patient* option to make corrections to erroneous patient data.


### 6.3.2 What the User Will See

- An area at the top of the first screen for entering common fields (Location, DSS Unit and Category) as well as the Procedure Date/Time
- Three tabs for entering providers, procedures and patients.
- Two tabs for checking work before submitting.

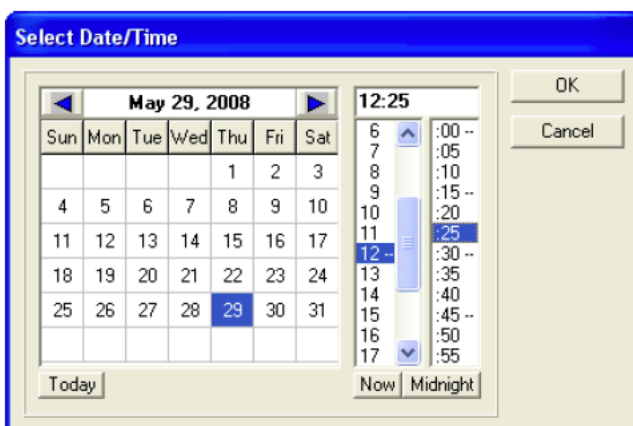
#### Example: First Screen Encountered Upon Entering Multiple Dates/Multiple Procedures

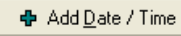

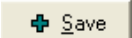
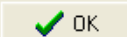


### 6.3.3 Instructions for Common Fields

1. Select a Location.
  - If there is only **one** Location set up for the Event Capture System, the Location on the screen will default to that value.
  - If there is **more than one** Event Capture Location set up, the Location will default to the last Location used. To change the Location, choose a Location from the dropdown list of available Event Capture Locations.
2. Select a DSS Unit.
  - If **one** DSS Unit is defined in the Event Capture *Management Menu* for DSS Unit, or if only one DSS Unit is assigned to the user, that DSS Unit value will default.
  - If **more than one** DSS Unit is defined, a default will not be assigned. Choose a DSS Unit from a dropdown list of accessible DSS Units.
  - The user can add, edit or delete any patient procedure for the selected DSS Unit.
  - To gain access to a DSS Unit, go the *Management Menu* and choose the *DSS Unit - Add or Update DSS Units* function to add the unit to the dropdown list.
3. Select a Category.
  - If only one category is defined for the specified DSS Unit, that category will be the default.
4. Select the Procedure Dates and Times by using the Select Date/Time popup window.
  - Type “N” and press <Enter> in the field instead of clicking the  button will bypass the pop-up or clicking **Now** on the pop-up will enter the current system date and time. When the **Midnight** button is clicked, “23:59” is displayed for the time on the date selected.

#### Example: Select Date/Time Pop-up

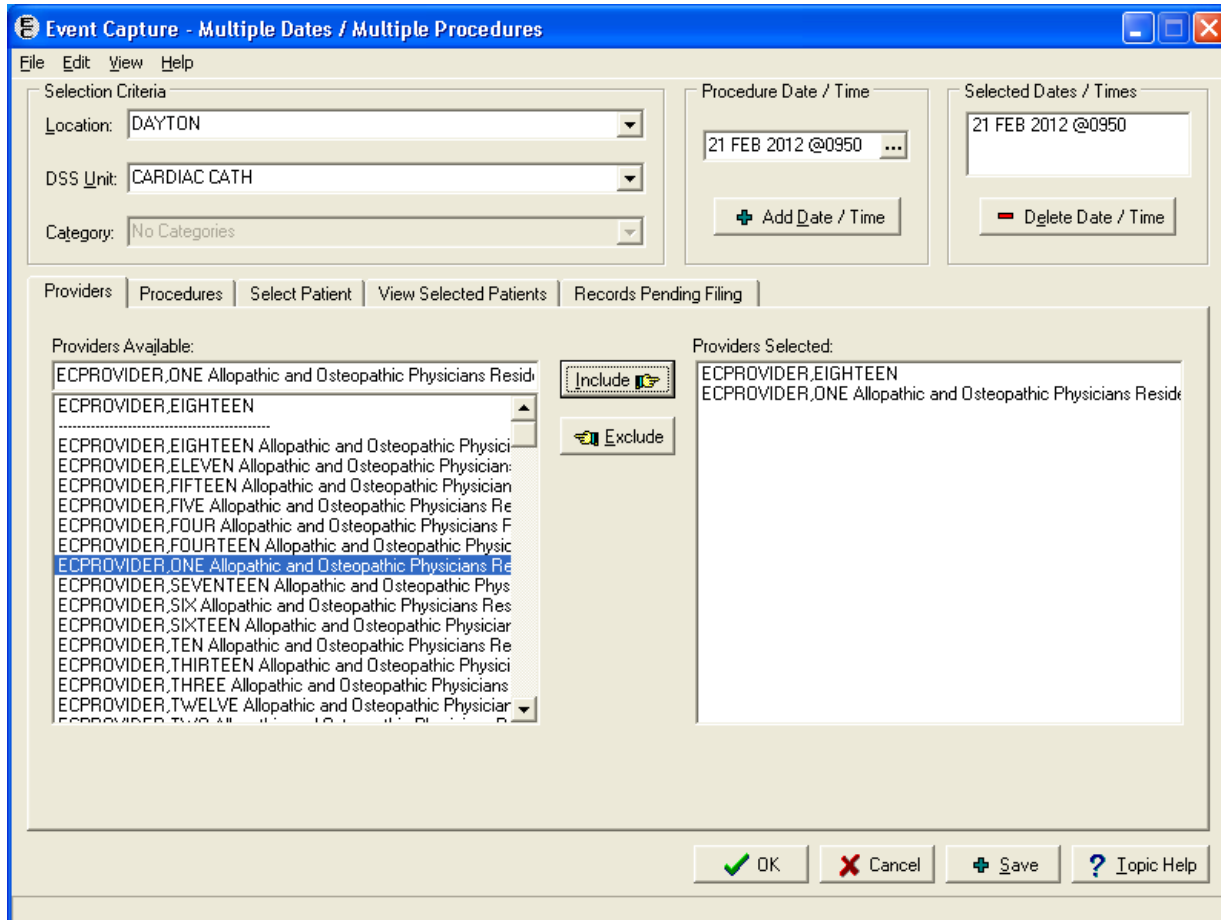



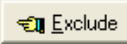
- Select a date and time and click **OK** to return to close the pop-up.
  - Click the **Add Date/Time**  button to add the choice to the Selected Dates list.
  - Select and add additional dates as needed.
  - To remove a date, choose it from the list and click the **Delete Date/Time**  button.
5. Click and complete the tabs for Providers, Procedures and Select Patient as described below.
  6. Use the View Selected Patients and Records Pending Filing tabs to check the work as described below.
  7. Click the **Save**  button at the bottom of the screen to process the transactions shown on the Records Pending Filing tab and then redisplay the screen initialized for a new set of entries.
  8. Click the **OK**  button at the bottom of the screen to process the transactions shown on the Records Pending Filing tab and then return to the *Data Entry* menu.

### 6.3.4 Adding Information to Providers Tab

1. Click on the **Providers** tab to select one or more providers.

#### Example: Providers Tab on Multiple Dates/Multiple Procedures Screen



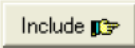
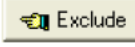



2. Select a Provider.
  - Use the Providers Available text box to enter the full or partial Provider name (last name first)
  - Select the provider from the resulting dropdown list and click **Include**. 
  - To remove a provider, select from the Providers Selected list and click **Exclude**. 
3. Repeat as needed to add additional providers.

## 6.3.5 Adding Information to Procedures Tab

1. Click on the **Procedures** tab to select one or more procedures.

### Example: Procedures Tab on Multiple Dates/Multiple Procedures Screen

2. Select a Procedure Name.
  - Select a procedure from dropdown list.
3. Enter the Volume for this procedure.
4. If applicable, the Reasons field will be active.
  - The user can enter up to three reasons.
  - Reason #1 must be entered before a second or third may be entered. Reason #2 must be entered before a third may be entered.
  - Reasons appear alphabetically in the dropdown.
  - A reason will not appear in the dropdown list for remaining reason fields as an option once selected.
  - A reason can be selected by entering the initial letter(s) into the Reasons field. If the reason that appears is not the correct choice, click the down arrow on the reason dropdown to select another reason or enter different letter(s).

5. If applicable, the CPT Modifiers section will be active.
  - Modifiers provide additional information about a CPT procedure. With functionality put in place by the Code Set Versioning project, only CPT modifiers that are active for the date and time of the event will show.
  - Choose a Modifier from the Modifiers Available list and click **Include**. 
  - Repeat as needed.
  - To remove a modifier, choose it from the Modifiers Selected list and click **Exclude**. 
  - Press <CTL-Click> to select multiple Modifiers at one time.
6. Click the **Add Procedure**  button to add this procedure to the Procedures Selected list and display a blank screen ready for another entry.
7. To add another procedure, repeat the steps above.
8. To delete a procedure, choose it from the Selected Procedures list and click the **Delete Procedure**  button.
9. To view a procedure in an expanded format, choose it from the Selected Procedures list and click the **View Details**  button. The View Procedure Record Details screen is not editable.


### Example: View Details Screen

10. Click the **Close Procedure View**  button to return to the Procedures tab.

## 6.3.6 Adding Information to Select Patient Tab

1. Click on the **Select Patient** tab to select one or more patients.

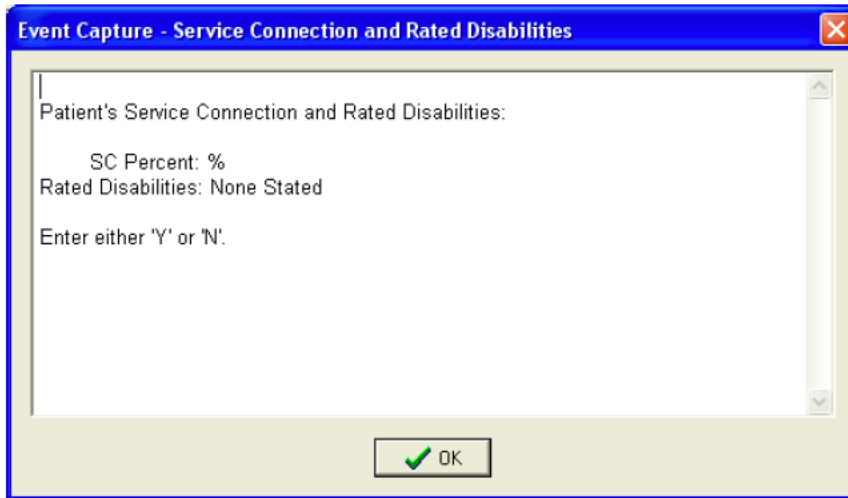
### Example: Select Patient Tab on Multiple Dates/Multiple Procedures Screen



2. Use the Patient Identifier field to select a patient.
  - Enter one of the following:
    - Patient Name (whole or partial, last name first)
    - Social Security Number
    - Last four digits of the Patient Social Security Number
    - First character of Last Name plus the last four digits of the SSN with no spaces
  - Press **<Enter>** or the Search button. 
  - Choose from the list of patients displayed.
3. Select an Eligibility Code for this procedure.
  - If the selected patient has only one Eligibility Code, that value defaults. Otherwise, select the Eligibility Code that applies to this procedure.
  - The primary Eligibility Code displays as the default.



4. If applicable, the mandatory classification questions section will be active.
  - Select **YES** only if the treatment received relates to that classification.
  - Press <F1> while in the Service-Connected field will open a pop-up window displaying the patient's service connection and any rated disabilities.

**Example: Service Connection and Rated Disabilities Screen**



5. Select the Ordering Section.
6. Select the Associated Clinic.
7. Select the associated ICD-9 diagnosis codes for the procedure.
  - Use the Primary field to enter one of the following:
    - ICD-9 code (whole or partial)
    - Diagnosis Name (whole or partial)
  - Press the Search button. 
  - Select from the resulting dropdown list.
  - Repeat as needed to select the Secondary Diagnosis Codes.
8. Click the **Add Patient**  Add Patient button to add this patient to the list of Selected Patients and display a blank screen ready for another entry.
9. Use the **View Selected Patients** tab to check the work.

### 6.3.7 Using View Selected Patients Tab to Verify Information

1. Click on the **View Selected Patients** tab to review the list of selected patients.


#### Example: View Selected Patient Tab on Multiple Dates/Multiple Procedures Screen

2. To remove a patient from the list, select it and click the **Delete Patient** button. Click **Yes** on the Confirmation pop-up.

#### Example: Deleting Patient Confirmation Pop-up

3. To view a patient in an expanded format, choose it and click the **View Details** button. The View Patient Record Detail screen is not editable.

### Example: View Patient Record Details Screen

4. Click the **Close Patient View**  button to return to the **View Selected Patients** tab.

### 6.3.8 Using Records Pending Filing Tab to Verify Information

1. Click on the **Records Pending Filing** tab to view a list of the records to be filed.

**Note:** This screen is not editable.

#### Example: Records Pending Filing Tab on Multiple Dates/Multiple Procedures Screen

Event Capture - Multiple Dates / Multiple Procedures

File Edit View Help

Selection Criteria

Location: DAYTON

DSS Unit: DIABETIC ECS

Category: No Categories

Procedure Date / Time

22 FEB 2012 @1246

+ Add Date / Time

Selected Dates / Times

22 FEB 2012 @1246

- Delete Date / Time

Providers | Procedures | Select Patient | View Selected Patients | **Records Pending Filing**

Date and Time	Procedure	Patient
22 FEB 2012 @1246	S9446 PT EDUCATION NOC GROUP [NOT DEFINED]	ECPATIENT_FIVE (666-15-1515) DOB: 5/11/1970

OK Cancel Save Topic Help

2. This screen lists the individual records (transactions) that will be processed when the **OK**

or **Save** button at the bottom of the screen are clicked. A pop-up will appear on the screen to show the number of records added.

**Note:** Click **OK** to return to the *Data Entry* menu or click **Save** to add additional entries.

#### Example: Information Popup after Saving



3. The records consist of every combination of the dates, procedures, and patients selected on the tabs described above and the providers selected will be assigned to each record.

4. To change the list, review and revise the selections on the Providers, Procedure and Select Patient tabs and for the Selected Dates/Times field.
5. To correct an entry, return to the *Data Entry* menu and select *Data Entry by Patient*.

# 7 Spreadsheet

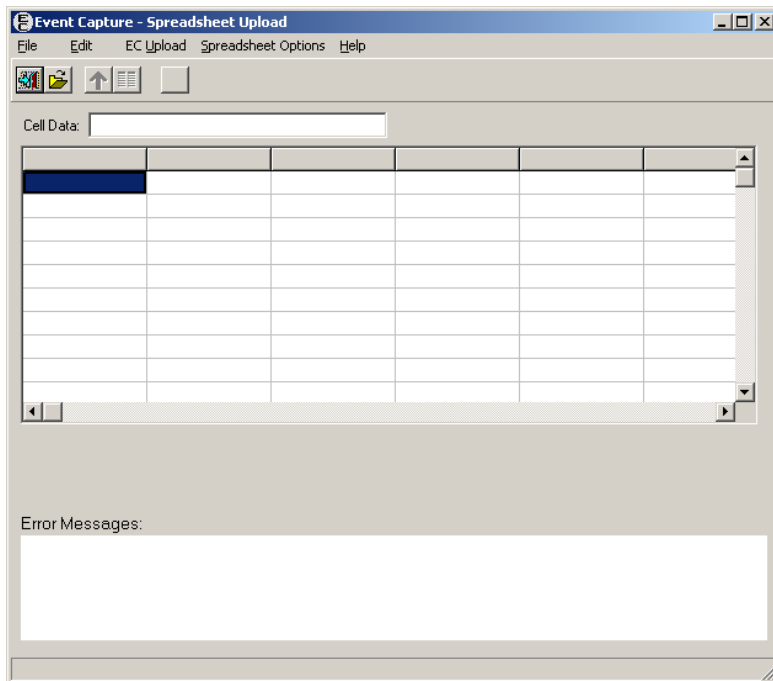
## 7.1 Enter Data via the Event Capture Spreadsheet

### 7.1.1 Before the User Starts


- The Spreadsheet screen in the ECS GUI application allows users to open an existing file containing their workload data and upload it to the EVENT CAPTURE PATIENT file (#721).
- The Spreadsheet application can work with existing Excel files and tab or comma delimited files. **Note:** All versions of Excel are compatible with this functionality
- Each record in the spreadsheet is validated before being filed in the EVENT CAPTURE PATIENT file (#721). Two levels of validation occur. The first level of validation occurs within Delphi. A check for necessary information is performed and no data transmits to VistA if the Delphi validation is not ‘passed’ for every record in the spreadsheet. After passing that level of validation, the RPC broker is “called” and each record transmits (one by one) to VistA for validation. If an error occurs during this process, an error message displays and the record is not filed. If an error does not occur, the record is filed in the EVENT CAPTURE PATIENT (#721) file. This process occurs until all records have been validated. The records that are filed will be removed from the spreadsheet grid, leaving only those records with errors. The error message(s) display in the error message box, and the records can be edited or deleted before retransmitting.

### 7.1.2 What the User Will See


#### Example: Spreadsheet Upload Screen



## 7.2 Entering Data via the Event Capture Spreadsheet Upload

1. When starting the Spreadsheet Upload, the column headers display in a default order. The user can change the order of the columns. To do this, click on the *Column Header* button  to change the order as needed.

**Note:** To change column order, the user can select the *Spreadsheet* Options menu and click on “Change Column Headers”

**Note:** Help is available for each column in the spreadsheet. Click on any column and then click on the *Help* button .

2. If an error message displays in the error message box, click on the error message to highlight the cell in the grid that most likely caused the error.
3. If more than one provider exists with that name in the spreadsheet (or if there is a partial name match), the application will return matching and partial-matching provider information (provider name, IEN, specialty, subspecialty, person class) to the error box. The desired provider can be determined and the user can enter the correct name or IEN information into the spreadsheet (as necessary).

For example, provider name ECPROVIDER, ONE may return provider information for ECPROVIDER, ONE, ECPROVIDER, ONE A and ECPROVIDER, ONE B. Provider name ECPROVIDER, THIRTY may return information for ECPROVIDER, THIRTY-ONE and ECPROVIDER, ONE HUNDRED THIRTY.

4. It has been determined that some inpatient records may need to be uploaded. We handle this by checking the patient status for that particular date/time. If it is determined to be an inpatient record, then an ‘Inpatient Override’ checkbox appears on the screen, a warning message appears in the error message box, and the record returns for editing by the user. At this point, the user has the following options.
  - Override the inpatient-warning message by selecting the Inpatient Override checkbox and then retransmit. The record uploads as inpatient.
  - Change the Encounter date/time and upload it as outpatient.
5. If the system detects duplicate records when the spreadsheet uploads, a ‘File Duplicate Record(s)’ checkbox appears on the screen. The duplicate records display in the error message box. If any duplicates exist when all of the records process, the prompt ‘File Duplicate Record(s)’ check box appears. Selecting the check box and retransmitting files eliminates the duplicate records in EVENT CAPTURE PATIENT file (#721).
6. Double-clicking on a cell in the spreadsheet grid and pressing <Delete> will remove only the contents of that cell only. Clicking once on a cell and then pressing <Delete> will delete the ENTIRE RECORD.

7. Column Headers - When starting the spreadsheet upload program, the column headers display in a default order. The user can change the column order at any time (before and after transmitting data to VistA). To change the column header order, select 'Spreadsheet Options', 'Change Column Headers'. The default column header order is as follows:
- Record number
  - Location
  - Pat SSN
  - Pat LName
  - Pat FName
  - DSS Unit Name
  - DSS Unit Num
  - DSS Unit IEN
  - Proc Code
  - Volume
  - Ordering Sect
  - Prov Name or IEN
  - Enc Date/Time
  - Category
  - Diag Code
  - Assoc Clinic

## 7.3 Spreadsheet Column Errors

The following errors may display while uploading data into Event Capture via the *Spreadsheet* option:

### 1. Record Number

Each record in the spreadsheet needs a unique record number (during each transmission), i.e., 1, 2, 3, etc. An error appears before VistA validation occurs if this field is blank. If the record number is not unique and there are no errors for that record number on the VistA side during validation, then there is no problem, and the data will transmit successfully. If the record number is not unique and an error has occurred on the VistA side, then the error messages is not properly mapped to the record(s) in error, and you will need to give it a unique record number at that point and retransmit the record(s) in error.

#### Delphi messages

Error getting column with Record number  
Record number is a mandatory field



## 2. Location

The Location number must exist on the INSTITUTION file (#4, ^DIC(4,D0,0)).

VistA message

Location not on INSTITUTION file (#4)

## 3. Pat SSN

Patient SSN must exist on the PATIENT file (#2, ^DPT).

If the SSN is shorter than 9 digits, it will be left filled with zeroes.

VistA messages

No SSN x-ref on PATIENT file (#2)

No SSN entry on PATIENT file (#2)

No internal entry on PATIENT file (#2) for SSN x-ref

SSN does not match SSN on PATIENT file (#2)

## d. Patient LName and Patient FName

Patient last and first name - The patient's name (last name, first name) must match the name on the PATIENT file (#2) for that SSN.

Delphi messages

Error getting column with Patient LName

Patient LName must be at least 2 characters long

VistA messages

Patient last name does not match VistA

Patient first name does not match VistA

## e. DSS Unit Name

If this field contains a value, then it must have a "B" cross-reference on the DSS UNIT file (#724).

**Note:** The DSS Unit name is not required if the DSS Unit IEN or the DSS Number column is filled in.

VistA message

Invalid DSS Unit Name

## f. DSS Unit Number

This is the Unit Number, found on the DSS UNIT file (#724). If this field contains a value, then it must have a "C" cross-reference on the DSS UNIT file (#724).

**Note:** The DSS Unit Number is not required if the DSS Unit IEN or the DSS Unit Name is filled in.

VistA message

Invalid DSS Unit Number

## g. DSS Unit IEN

If this field contains a value, then it must exist on the DSS UNIT file (#724).

**Note:** The DSS Unit IEN is not required if the DSS Unit Name or the DCM Dept is filled in.

VistA message

Invalid DSS Unit IEN

## h. Proc Code

This is the procedure/CPT code value (not the description). The National Procedure, Local Procedure and CPT code are all valid codes for this column. The procedure/CPT must exist on the EC NATIONAL PROCEDURE file (#725) or the CPT file (#81), and the EC Event Code Screen must be 'active' for the Location, DSS Unit IEN, and Procedure/CPT combination. With functionality put in place by the Code Set Versioning project, only CPT codes that are active for the date and time of the event are processed.

VistA messages

Procedure or "D" x-ref not on EC NATIONAL PROCEDURE file (#725)  
 Procedure invalid for this Location and DSS Unit  
 Unable to check for active EC Event Code Screen

## i. Volume

The volume must be a number from 1 through 99.

Delphi error messages

Error getting column with Volume number  
 Volume is a mandatory field  
 Volume has a limit of 2 digits

VistA messages

Volume must be a number from 1 to 99  
 Volume must contain numeric characters only

## j. Ordering Section

This is the name of the Ordering Section. A validation occurs for ordering sections entered into the spreadsheet by the user (against the "B" cross reference in the MEDICAL SPECIALTY file (#723)). If the user leaves this field blank, the program will derive the Ordering Section from DSS UNIT file (#724) using the DSS Unit IEN. It will then transmit to the Event Capture filer program.

VistA message

Invalid Ordering Section  
 Unable to determine Ordering Section

## k. Prov Name or IEN

This is the Provider's last and first name as it appears in the "B" cross reference of the NEW PERSON file (#200). If the provider also has a middle initial, then it should be included, i.e. 'ECPROVIDER, SEVEN J'. If the system finds a partial match for name, the application will return the provider information (provider name, IEN, specialty, subspecialty, person class) for all options to the error box, and you can then determine which provider they want. The Provider must have a "B" cross-reference and exist on the NEW PERSON file (#200) and the person class must be 'active'.

LASTNAME, FIRSTNAME, or IEN

VistA messages

Provider has no B x-ref on NEW PERSON file (#200)  
 Unable to determine person class  
 Provider does not have an active person class

## l. Enc Date/Time

The Encounter Date/Time can be in any valid FileMan format.

## Examples:

mm/dd/yy @hh:mm  
 mm/dd/yyyy @hh:mm  
 mm-dd-yy @hh:mm  
 mmddyy @hhmm  
 N, N-1, N-1H, etc.

VistA message

Invalid encounter date/time

## m. Category

The Category field can be blank. If the user enters a value, it needs to have a B cross-reference in the EC CATEGORY file (#726).

VistA message

Category "B" x-ref not on EC CATEGORY file (#726)

## n. Diag Code

This is the primary diagnosis code value. It must exist on the ICD DIAGNOSIS file (#80). With functionality put in place by the Code Set Versioning project, only ICD codes that are active for the date and time of the event process.

**Note:** The Diagnosis Code is only required for records sent to PCE. The system ignores it otherwise.

VistA messages

Diagnosis code is required for this DSS Unit

Unable to retrieve Diagnosis IEN

Diagnosis code is required for this DSS Unit

Unable to retrieve Diagnosis IEN

## o. Assoc Clinic

This is the Associated Clinic name. It must have a “B” cross-reference on the HOSPITAL LOCATION file (#44), be of type “C” (clinic), and be ‘active’ for that encounter date. The Associated Clinic must have conforming stop codes to be selectable.

**Note:** The Associated Clinic is only required for records sent to PCE and will be ignored otherwise.

VistA messages

Associated Clinic is required for this DSS Unit

Assoc Clin "B" x-ref not found on HOSPITAL LOCATION file (#44)

Assoc Clin not found on HOSPITAL LOCATION file (#44)

Associated Clinic must be of type "C" (clinic)

Associated Clinic inactive for this encounter date

## 7.4 Other Logic

### DSS Unit IEN

The system obtains DSS Unit IEN by checking the DSS Unit IEN field, the DCM Dept field and the DSS Unit Name field (only one is needed). If any of the three columns contain erroneous data, an error message displays and the record does not file.

### Send to PCE

Using the DSS Unit, the application determines if the record transmits to PCE. If so, the application then validates the Associated Clinic and Diagnosis Code. If not, the system ignores these two columns.

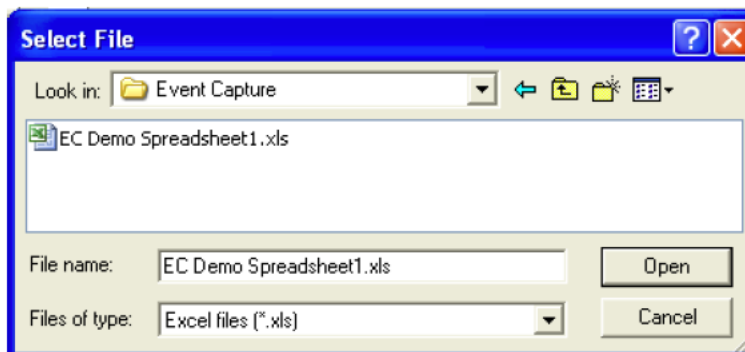
## 7.5 Example of Uploading Data via Event Capture Spreadsheet

1. Click on the *Spreadsheet* button in the Main Menu.

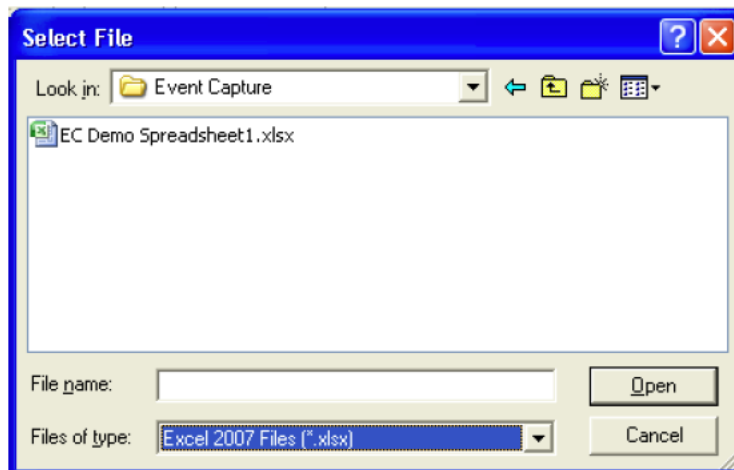
**Note:** This functionality is compatible with all versions of Excel.

2. Click **Open** in the File menu to display a list of Excel files from which to choose. Find Excel file and click Open. A list of patient data will appear with column headings for Record Number, Station Number, Patient first and last name, SSN, DSS Unit Number and IEN, DCM Department, Procedure and Diagnosis Code, Volume, Service, Provider first and last name, Encounter Date/Time, and Associated Clinic.

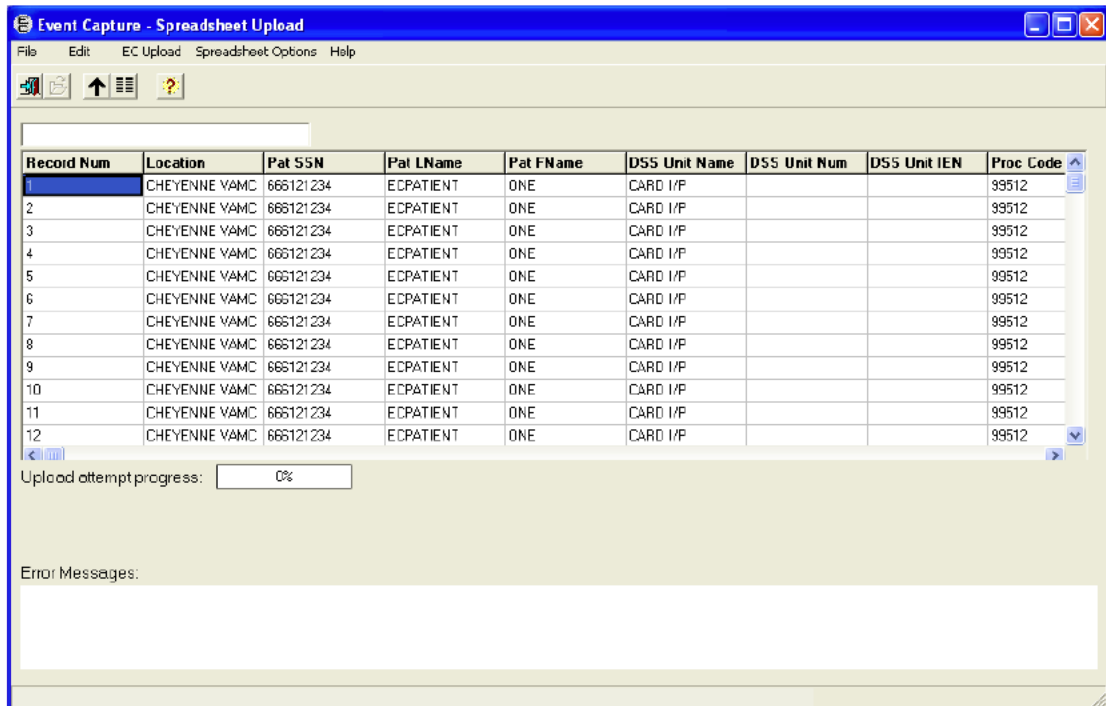
**Example: Selecting a File to Upload Prior to Excel 2007**




**Example: Selecting a File to Upload for Excel 2007 or Newer**



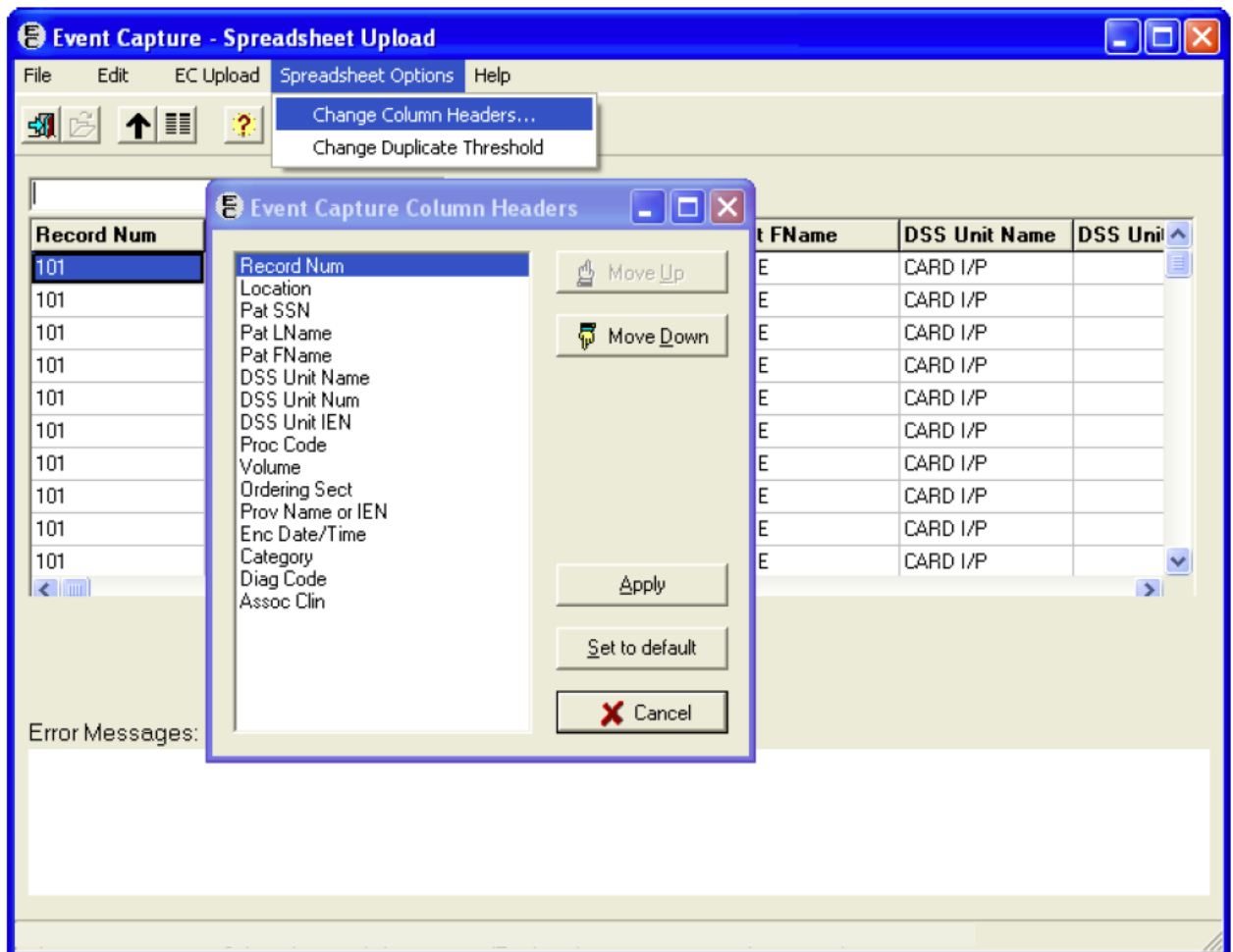
### Example: Sample Data for Spreadsheet Upload



**Note:** The user can change the spreadsheet column order.

- To change the spreadsheet with a different order, click on the **Column Header** button  or select the **Spreadsheet Options** menu and click on **Change Column Headers** to change the order.

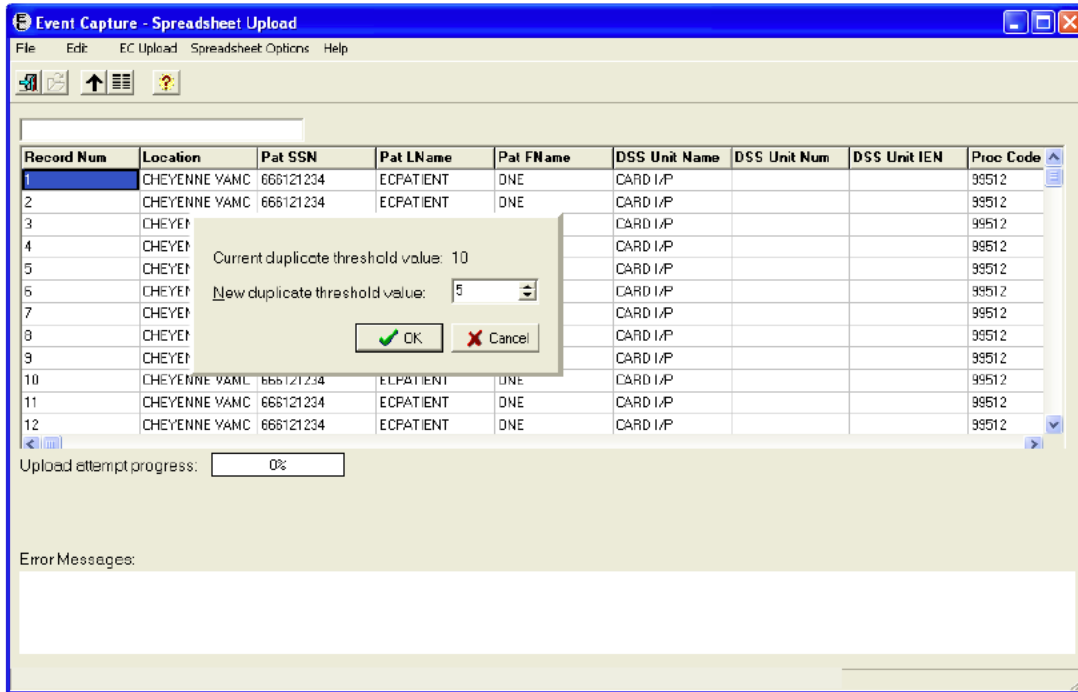
### Example: Change Column Headers Pop-up




- To change the order of the columns, highlight the column heading in the list and clicking on the Move Up and Move Down buttons. Continue to change the column heading order until it matches the spreadsheet used and then upload the spreadsheet.

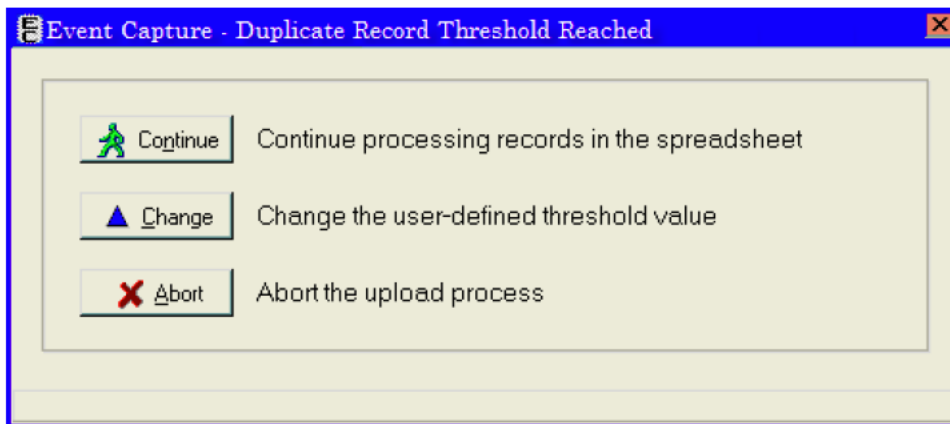
**Note:** At this point, the user can change the Duplicate Threshold value through the Spreadsheet Options dropdown menu by selecting Change Duplicate Threshold.

**Example: Changing Duplicate Threshold**

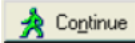

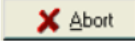


5. Click on **Transmit EC Data to VistA** in the EC Transmission menu or the **Update Records to VistA** button  in the toolbar. The data is validated and uploaded and error messages display for those records containing errors.
6. The Spreadsheet checks for duplicate records, based on the Location (Station number), Patient SSN, DSS Unit, and Procedure Date/Time. The duplicate records display below the spreadsheet. When the user-defined threshold of duplicate records is reached, a message box will display with the options of **Continue**, **Change** and **Abort**.

**Example: Duplicate Records Threshold Reached Screen**





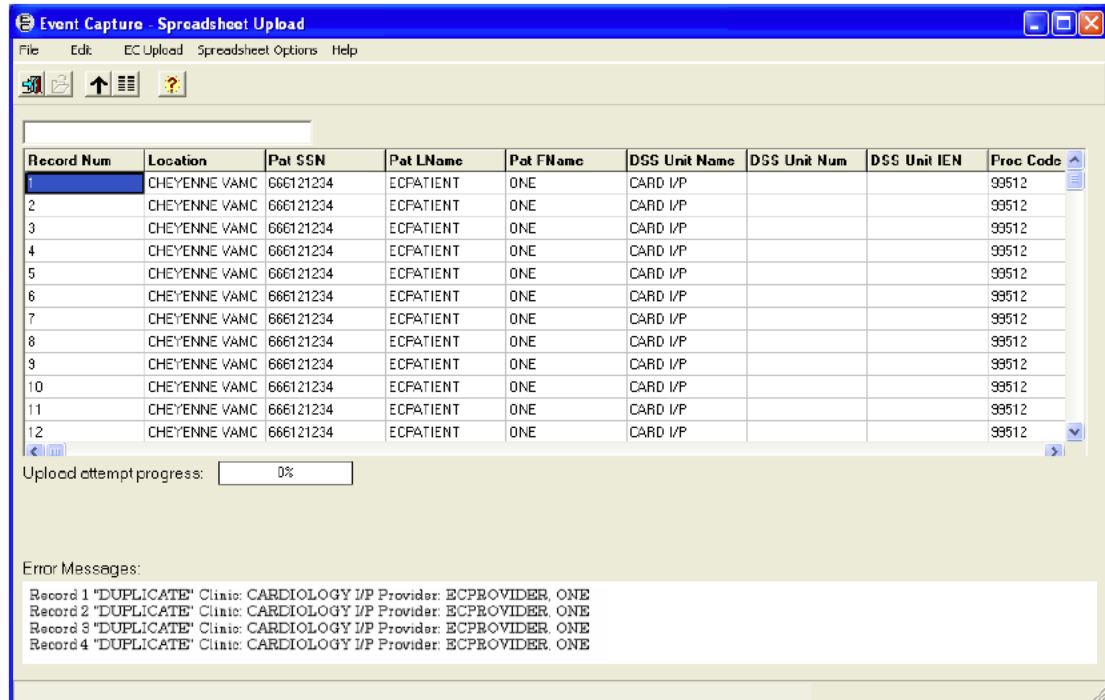
- Continue  : resets the counter and resumes processing of records.
- Change  : The Duplicate Threshold defaults 10 to a user-defined number. The Duplicate Threshold value can be changed two ways:
  - From the **Spreadsheet Options** dropdown menu, select **Change Duplicate Threshold**
  - When the threshold is reached and the Duplicate Record Threshold Reached window is displayed, click the Change button
- Abort  : terminates the upload process.

**Example: Aborting Process Pop-up**



7. The user can correct/delete records with errors and the spreadsheet retransmitted.

**Example: Sample Data with Error Messages Before Upload**



8. When the data transmits, only those records with errors will return.



## 8 Reports

### 8.1 Available Reports





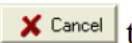
The following reports are available:

- Patient Summary Report
- DSS Unit Activity Report
- DSS Unit Workload Report
- Provider Summary Report
- Ordering Section Summary Report
- Provider (1-7) Summary Report
- PCE Data Summary Report
- Inactive Person Class Report (IPC)
- Procedure Reasons Report
- ECS Records Failing Transmission to PCE Report
- DSS Unit Users Access Report
- National / Local Procedure Report
- Category Report
- Print Category and Procedure Summary (Report)
- Event Code Screens with CPT Codes Report
- National / Local Procedure Codes with Inactive CPT Codes
- DSS Units with any Associated Stop Code Errors
- Event Capture Encounters Report
- Event Code Screens with Inactive Default Associated Clinic
- DSS Units/Event Code (EC) Screens for Selected Procedure Code Report

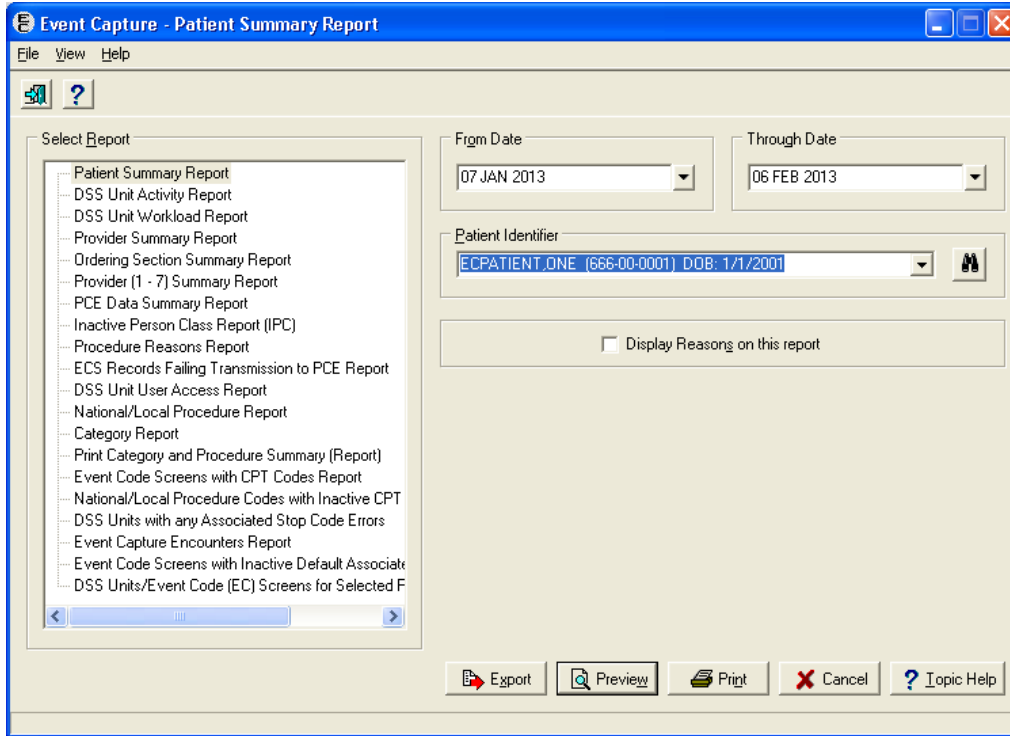
## 8.2 Patient Summary Report

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.
- The user can choose to include Procedure Reasons (EVENT CAPTURE PATIENT file (#721)) on the report. Up to three reasons will be included.
- The “Display Reasons on this report” will clear when the user selects another report or upon exiting the screen.
- After previewing the report, the user will have the option to print or close the report.

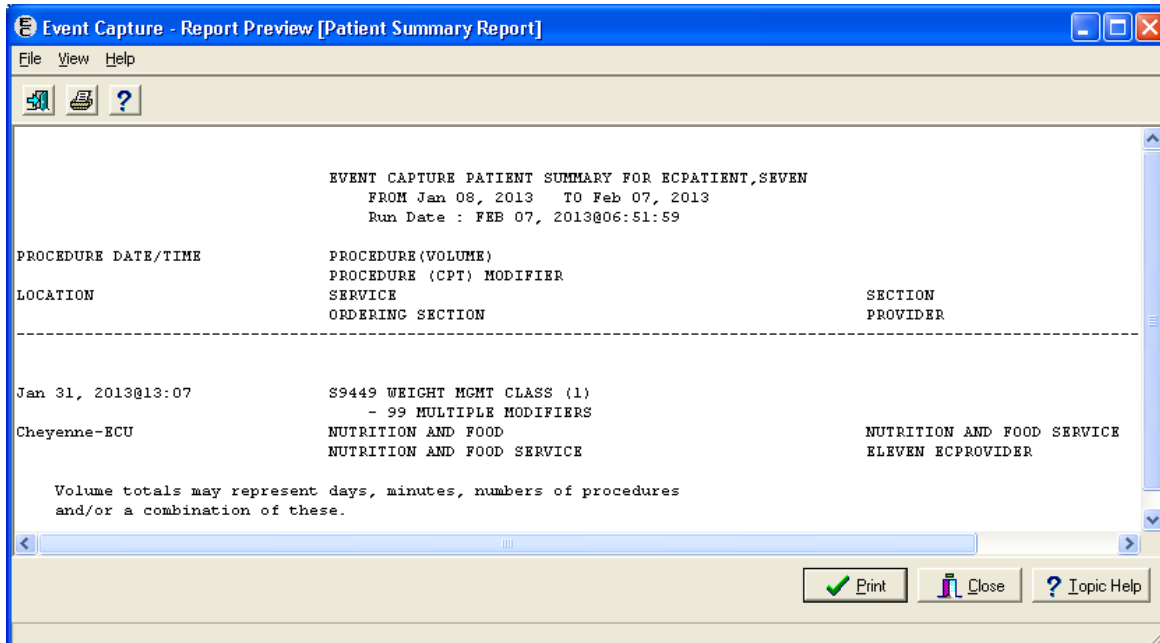
### Instructions

1. Enter a date range.
2. Use the Patient Identifier field to select a patient.
  - Enter one of the following:
    - Patient Name (whole or partial, last name first)
    - Social Security Number
    - Last four digits of the Patient Social Security Number
    - First character of Last Name plus the last four digits of the SSN with no spaces
  - Press <Enter> or the Search button. 
  - Choose from the list of patients displayed.
3. Choose whether to include Procedure Reasons in the report.
4. Export , Preview , Print  or Cancel  the report.

**Example: Patient Summary Report Required Information without Reasons**



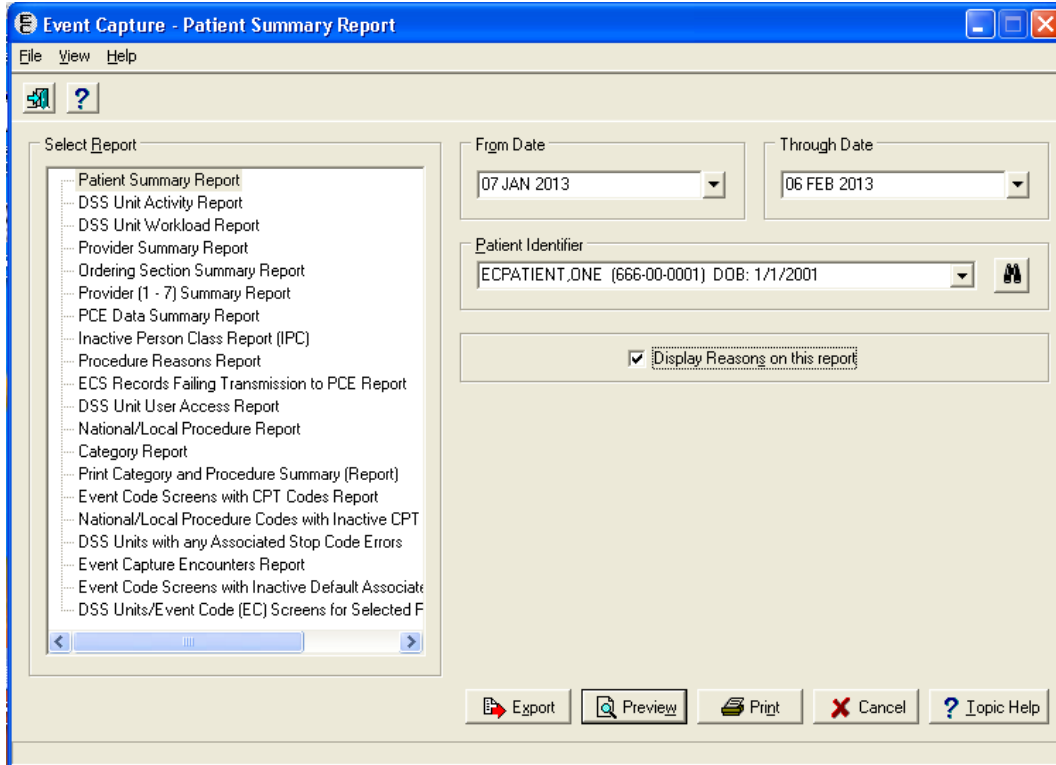
**Example: Patient Summary Report from Report Preview without Reasons**



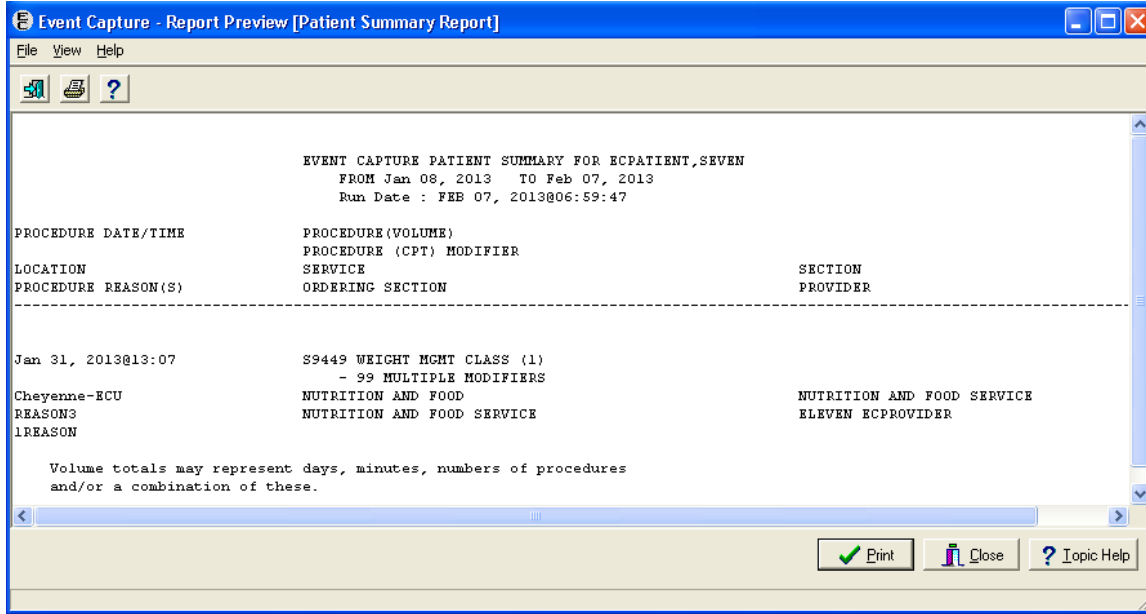
**Example: Patient Summary Report from Export without Reasons**

A	B	C	D	E	F	G	H	I	J	K	L
Patient Summary Report											
		PROCEDURE		CPT	PROCEDURE	PROCEDURE					
PATIENT NAME	SSN	DATE/TIME	LOCATION	CODE	CODE	NAME	VOLUME	SERVICE	SECTION	ORDERING SECTION	PROVIDER
ECPATIENT,SEVEN	0177	Jan 31, 2013@13:07	Cheyenne-ECU	S9449		WEIGHT MGMT CLASS	1	NUTRITION AND FOOD AND FOOD	AND FOOD SERVICE	NUTRITION AND FOOD SERVICE	ELEVEN ECPROVIDER

**Example: Patient Summary Report Required Information with Reasons checked**



**Example: Patient Summary Report from Report Preview with Reasons**






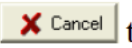
**Example: Patient Summary Report from Export with Reasons**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Patient Summary Report														
PATIENT	PROCEDURE			CPT	PROCEDURE	PROCEDURE		REASON	REASON	REASON			ORDERING	
NAME	SSN	DATE/TIME	LOCATION	CODE	CODE	NAME	VOLUME	#1	#2	#3	SERVICE	SECTION	SECTION	PROVIDER
ECPATIENT, SEVEN	0177	Jan 31, 2013@13:07	Cheyenne- ECU		S9449	WEIGHT MGMT CLASS	1	REASON3	1REASON		NUTRITION AND FOOD	NUTRITION AND FOOD SERVICE	NUTRITION AND FOOD SERVICE	ELEVEN ECPROVIDER

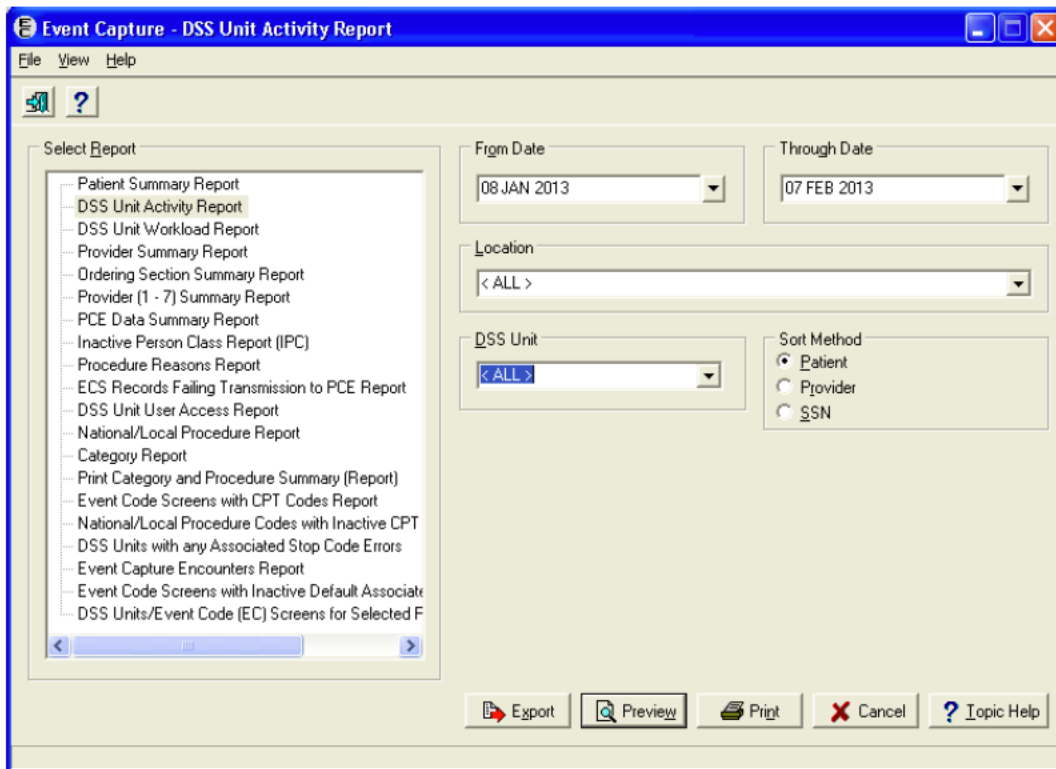
## 8.3 DSS Unit Activity Report

- The report can be sorted by patient, provider or SSN
- If more than one location has been set up, choose one or all locations.
- After previewing the report, the user will have the option to print or close the report.

### Instructions

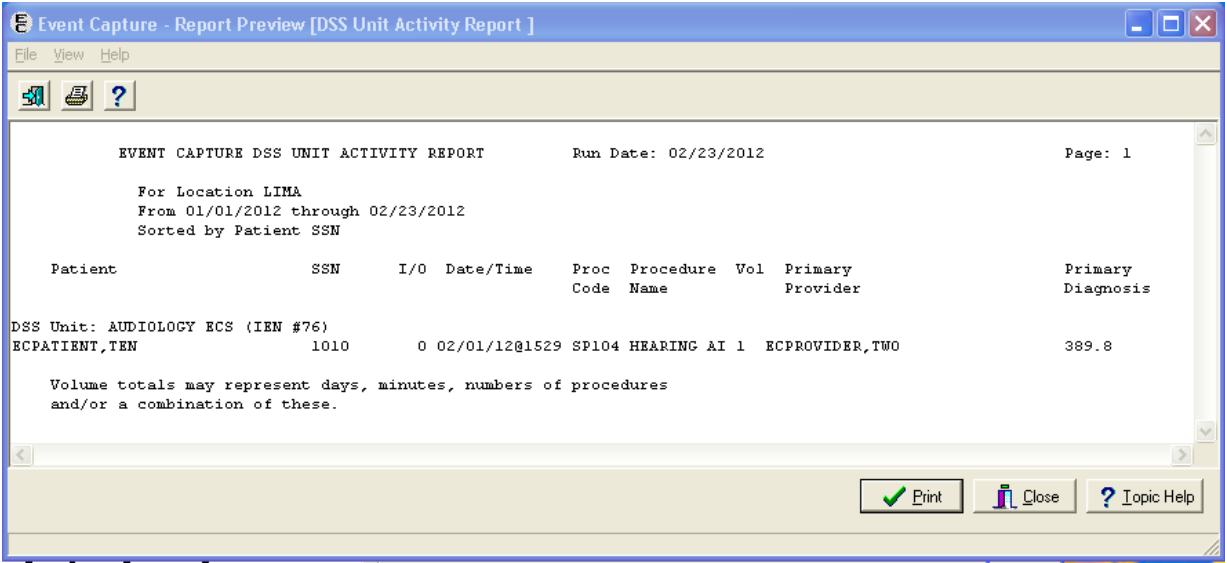
1. Enter a date range.
2. Select one or all Location(s).
3. Select one or all DSS Unit(s).
4. Choose Sort Method (Patient, Provider or SSN) for the report.  
**Note:** Only the last four digits of the patient’s SSN will appear on the print preview of this report.  
**Note:** The column order does not change with Sort Method when exported into Excel.
5. Export , Preview , Print  or Cancel  the report.

### Example: DSS Unit Activity Report Required Information





**Example: DSS Unit Activity Report from Print Preview**



**Example: DSS Unit Activity Report from Export**

A	B	C	D	E	F	G	H	I	J	K
DSS Unit Activity Report										
LOCATION	DSS UNIT (IEN #)	PATIENT	SSN	I/O	DATE/TIME	PROCEDURE CODE	PROCEDURE NAME	VOLUME	PRIMARY PROVIDER	DIAGNOSIS
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT(IEN #32)	ECPATIENT, NINE	666000150	O	01/31/13@13:05	SW001	CASE MANG	1	EC PROVIDER, FIFTEEN	110.2

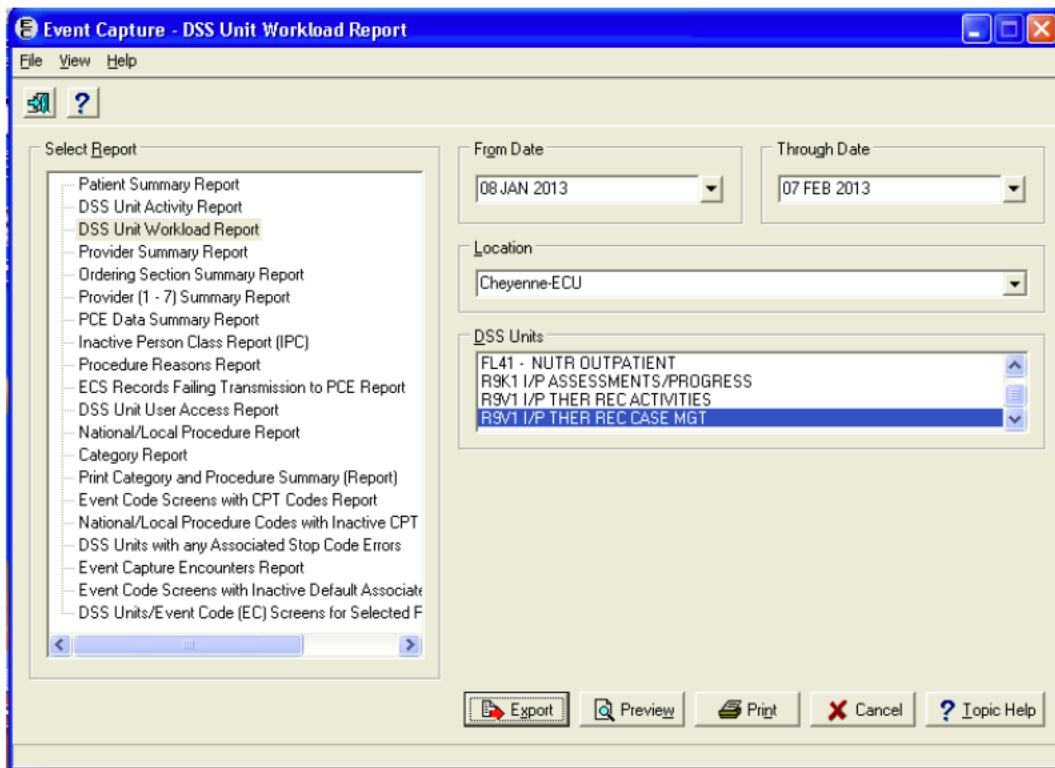
## 8.4 DSS Unit Workload Report

- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred
- After previewing the report, the user will have the option to print or close the report.

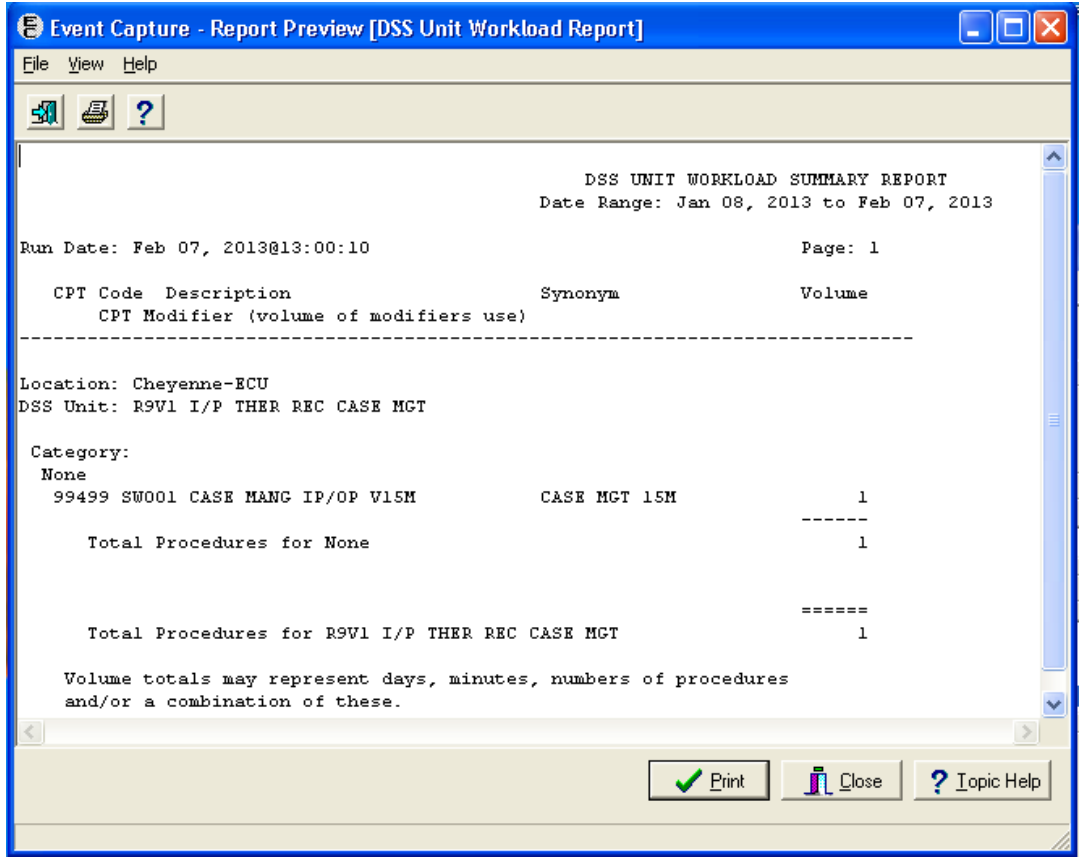
### Instructions

1. Enter a date range.
2. Select one or all location(s).
3. Select one or all DSS Unit (s).
4. Export , Preview , Print  or Cancel  the report.

### Example: Required Information for DSS Unit Workload Report



**Example: DSS Unit Workload Report from Print Preview**



**Example: DSS Unit Workload Report from Export**

A	B	C	D	E	F	G	H	I	J	K	L	M	N
DSS Unit Workload Report													
			CPT	PROCEDURE	PROCEDURE	PROCEDURE		CPT	MOD 1	CPT	MOD 2	CPT	MOD 3
LOCATION	DSS UNIT	CATEGORY	CODE	CODE	NAME	VOLUME	SYNONYM	MOD 1	VOL	MOD 2	VOL	MOD 3	VOL
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	None	99499	SW001	CASE MANG IP/OP V15M	1	CASE MGT 15M						

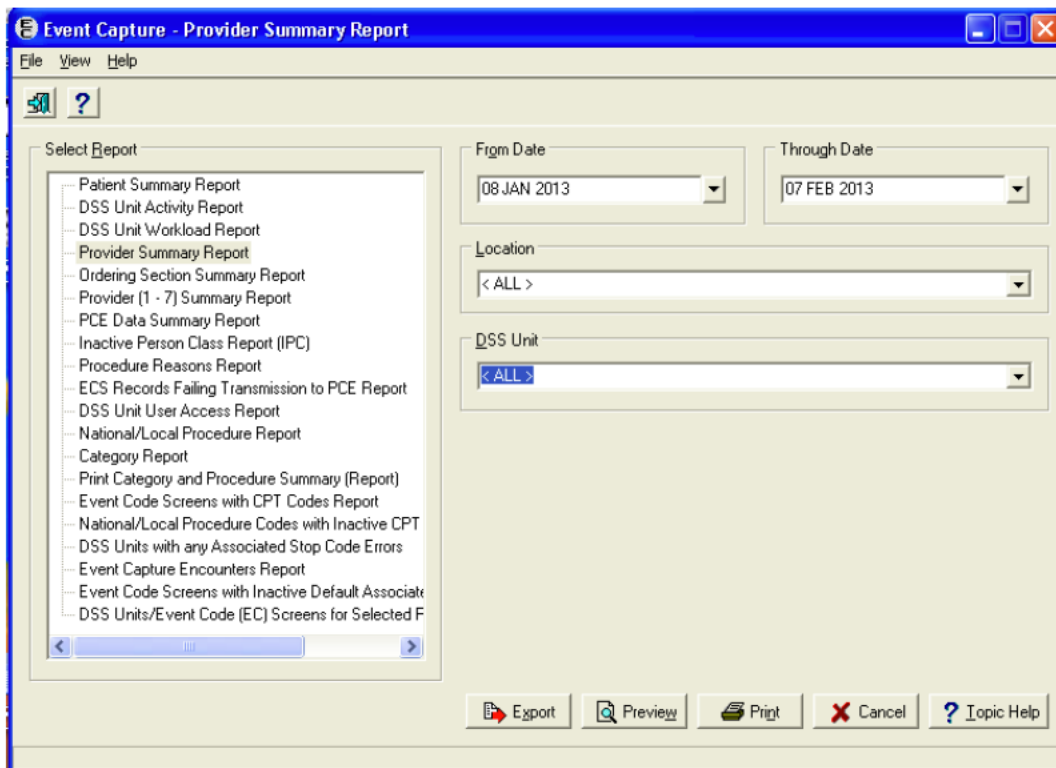
## 8.5 Provider Summary Report

- Locations, DSS Units, categories, procedures and procedure reasons must be defined before generating this report.
- If Procedure Reason #1 is not listed, the report prints “Reason Not Defined”.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.
- After previewing the report, the user will have the option to print or close the report.

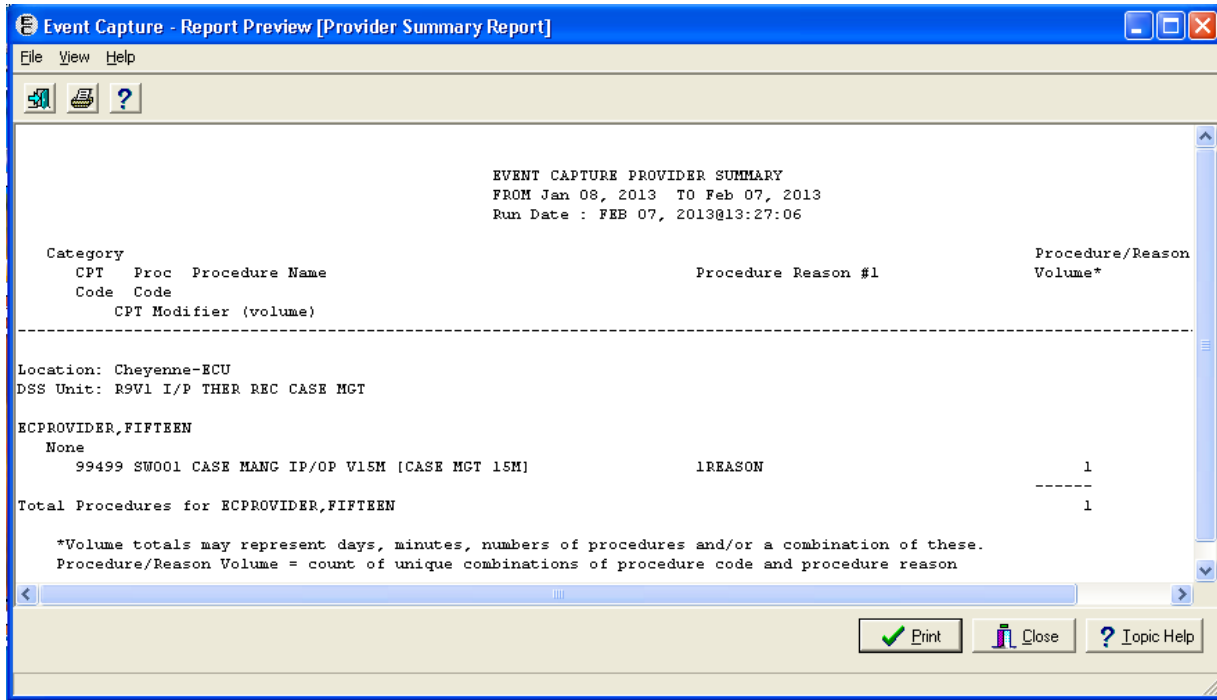
### Instructions

1. Enter a date range.
2. Select one or all Location(s).
3. Select one or all DSS Unit(s).
4. Export , Preview , Print  or Cancel  the report.

### Example: Provider Summary Report Required Information



**Example: Provider Summary Report from Print Preview**







**Example: Provider Summary Report from Export**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Provider Summary Report														
				CPT	PROCEDURE		PROCEDURE	PROCEDURE/	CPT	CPT MOD	CPT	CPT	CPT	CPT MOD
LOCATION	DSS UNIT	CATEGORY	PROVIDER	CODE	CODE	PROCEDURE NAME	REASON#1	REASON	MOD 1	1 VOL	MOD 2	MOD 2	MOD 3	3 VOL
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	None	ECPROVIDER, FIFTEEN	99499	SW001	CASE MANG IP/OP V15M [CASE MGT 15M]	1REASON	1						

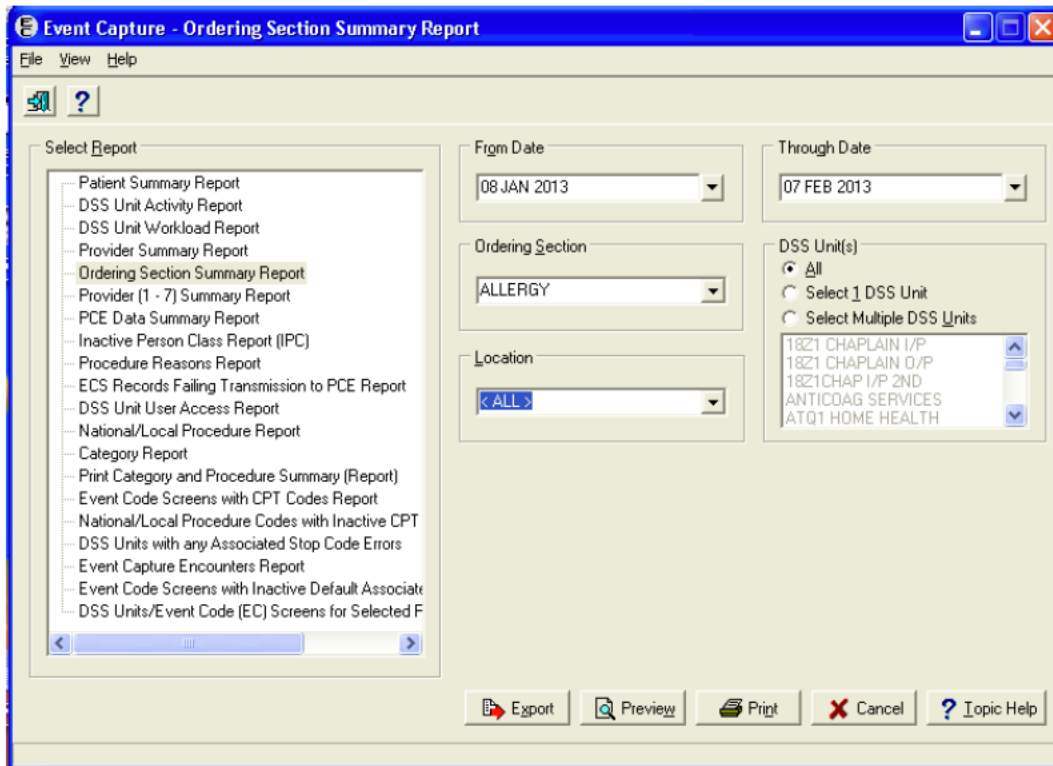
## 8.6 Ordering Section Summary Report

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.
- After previewing the report, the user will have the option to print or close the report.

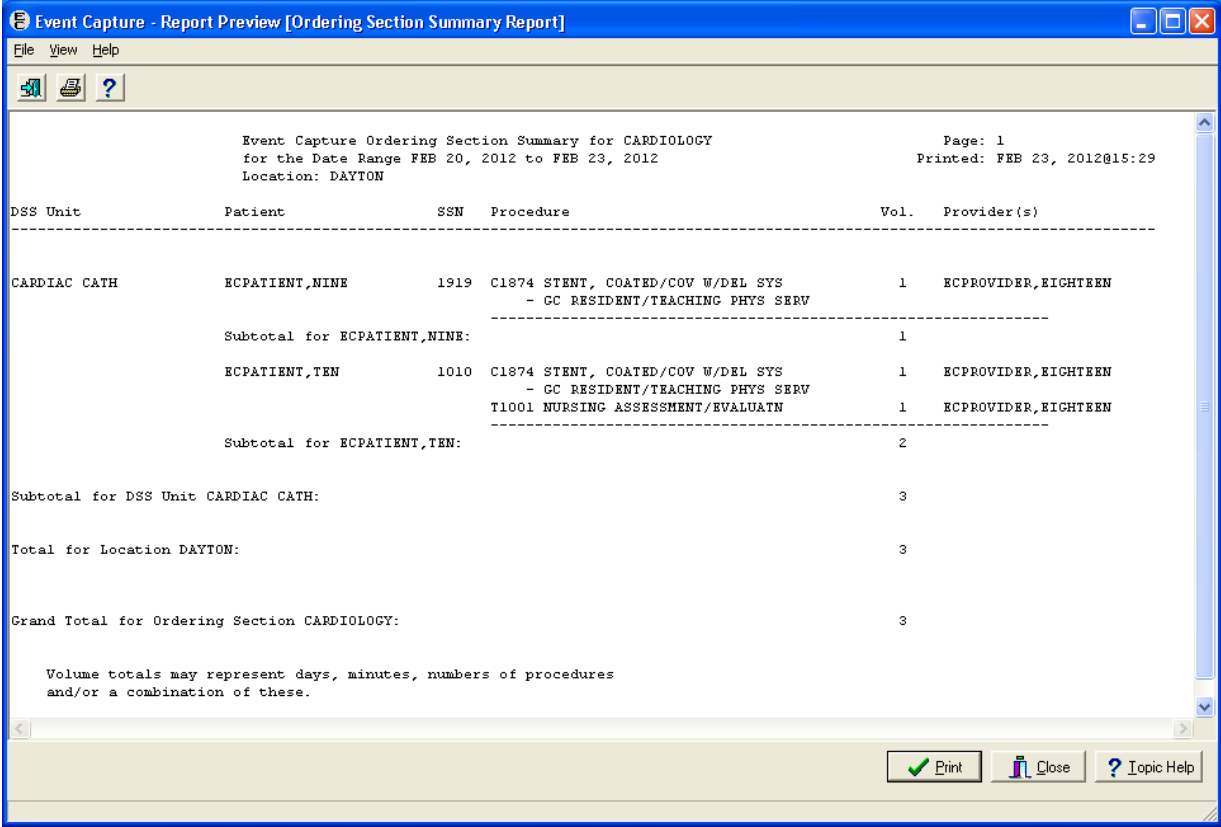
### Instructions

1. Enter a date range.
2. Select an Ordering Section.
3. Select a specific or all Location(s).
4. Select one, multiple, or all DSS Unit(s).
5. Export , Preview , Print  or Cancel  the report.

### Example: Ordering Section Summary Report Required Information



**Example: Ordering Section Summary Report from Print Preview**



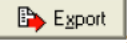


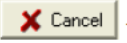
**Example: Ordering Section Summary Report from Export**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
Ordering Section																		
ORDERING SECTION	LOCATION	DSS UNIT	PATIENT	SSN	CPT CODE	PROCEDURE CODE	DESCRIPTION	VOLUME	CPT MOD #1	CPT MOD #2	CPT MOD #3	PROVIDER #1	PROVIDER #2	PROVIDER #3	PROVIDER #4	PROVIDER #5	PROVIDER #6	PROVIDER #7
NUTRITION AND FOOD SERVICE	Cheyenne-ECU	FL41 - NUTR OUTPATIENT	ECPATIENT, SEVEN	1111	S9449		WEIGHT MGMT CLASS	1		52	REDUCED SERVICES				ECPROVIDER,NINE			

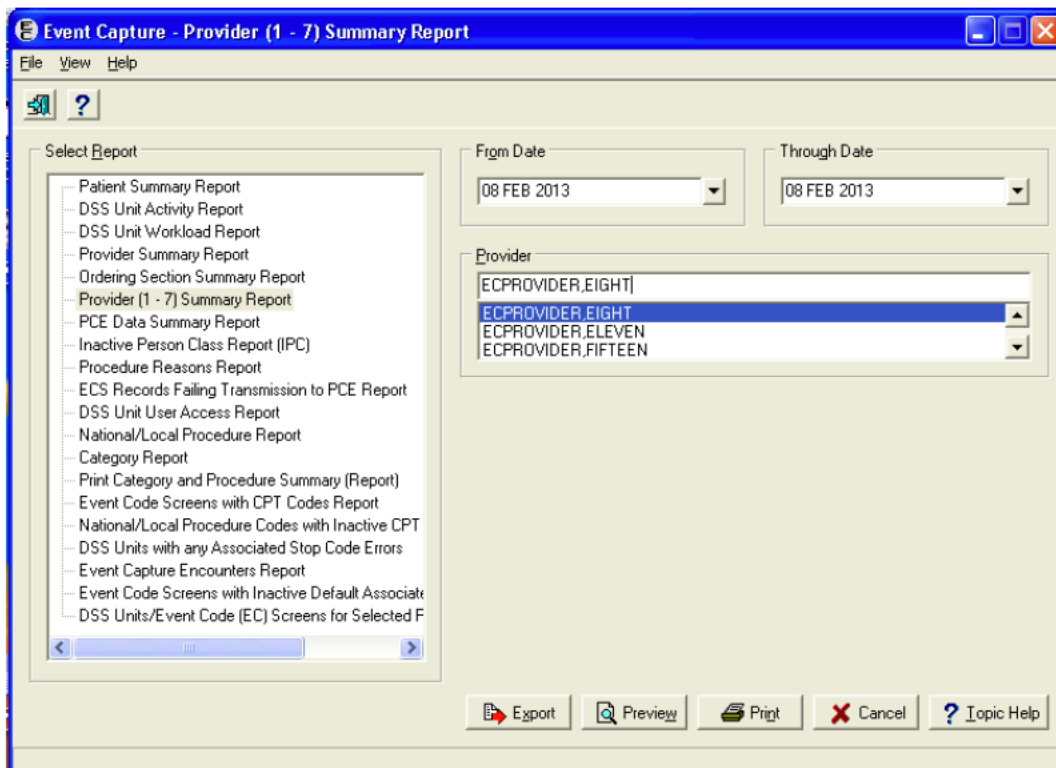
## 8.7 Provider (1-7) Summary Report

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers and their associated descriptions are reflective of the date the event occurred.
- This report provides the ability to view up to seven provider numbers for providers within a Location/DSS Unit.
- Summarizes the workload of providers for a selected date showing how many times a specific procedure was performed on a patient with the selected provider as Provider 1, Provider 2, through Provider 7.
- After previewing the report, the user has the option to print or close the report.

### Instructions

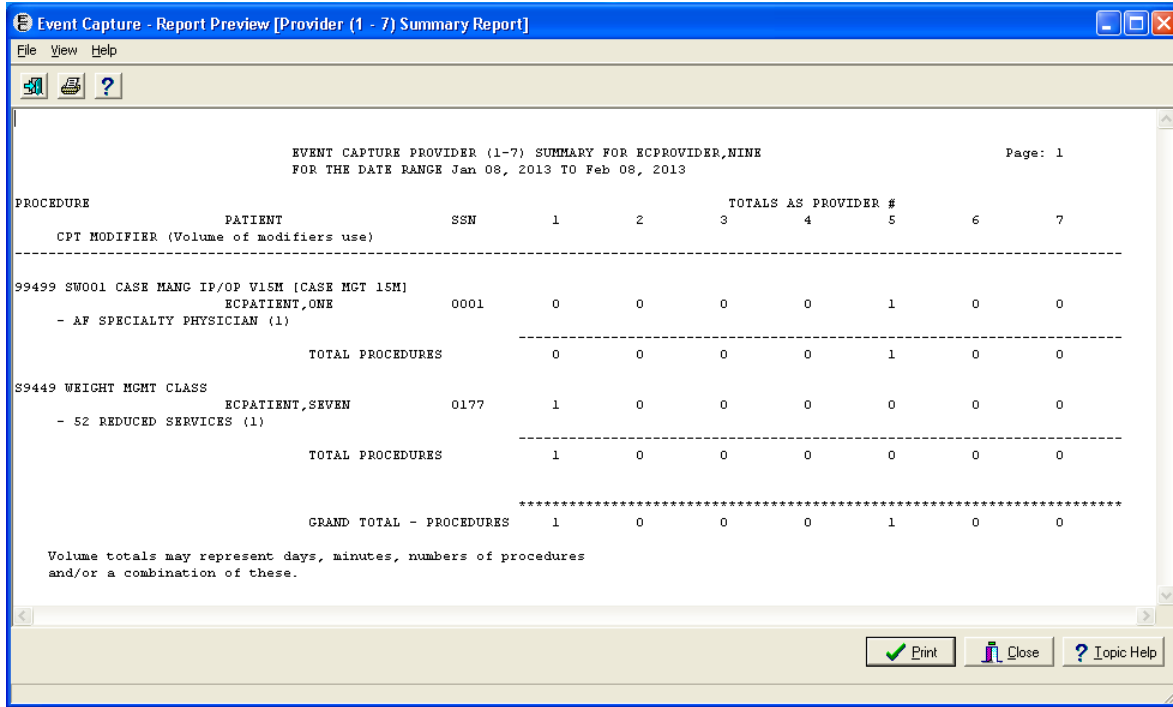
1. Enter a date range.
2. Enter the name of a Provider.
3. Export , Preview , Print  or Cancel  the report.

### Example: Provider (1-7) Summary Report Required Information





**Example: Provider (1-7) Summary Report from Print Preview**








**Example: Provider (1-7) Summary Report from Export**

A	B	C	D	E	F	G	H	I	J	K	L	M
Provider (1 - 7) Summary Report												
PROVIDER	CPT	PROCEDURE				TOTAL AS	TOTAL AS	TOTAL AS	TOTAL AS	TOTAL AS	TOTAL AS	TOTAL AS
NAME	CODE	CODE	PROCEDURE NAME	PATIENT	SSN	PROV #1	PROV #2	PROV #3	PROV #4	PROV #5	PROV #6	PROV #7
EC PROVIDER, NINE	99499	SW001	CASE MANG IP/OP V15M [CASE MGT 15M]	EC PATIENT, ONE	0001	0	0	0	0	1	0	0
EC PROVIDER, NINE	S9449		WEIGHT MGMT CLASS	EC PATIENT, SEVEN	0177	1	0	0	0	0	0	0

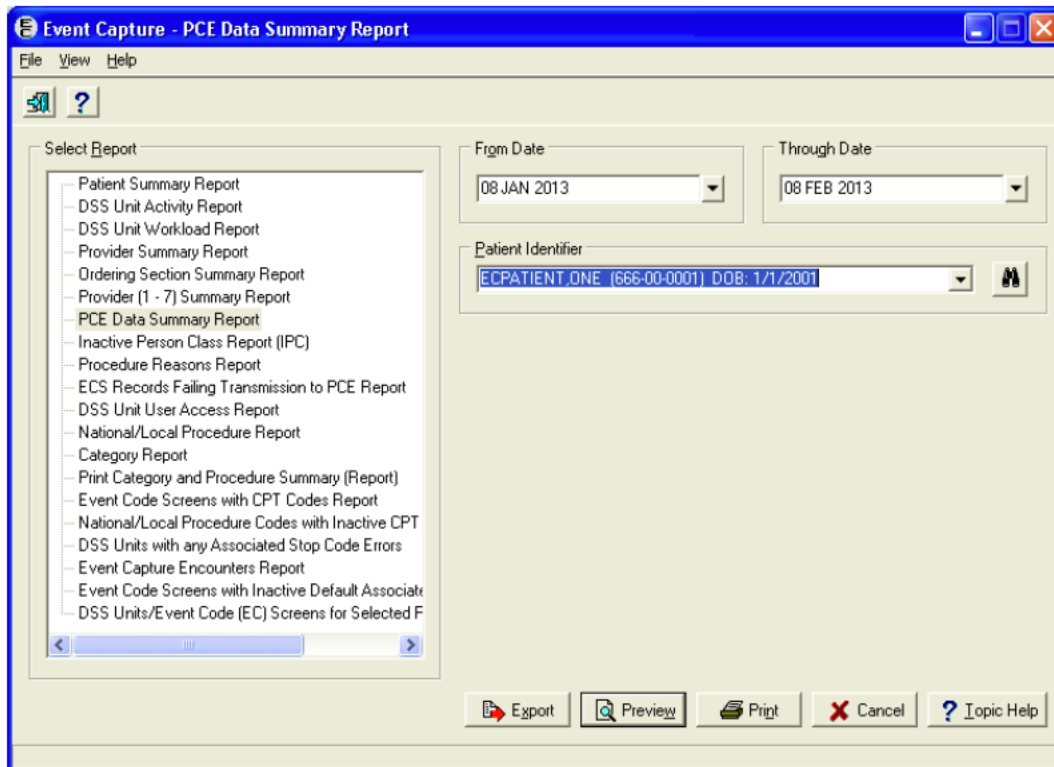
## 8.8 PCE Data Summary Report

- The design of this report is for a 132-column format.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers, diagnosis codes and their associated descriptions are reflective of the date the event occurred.
- After previewing the report, the user has the option to print or close the report.

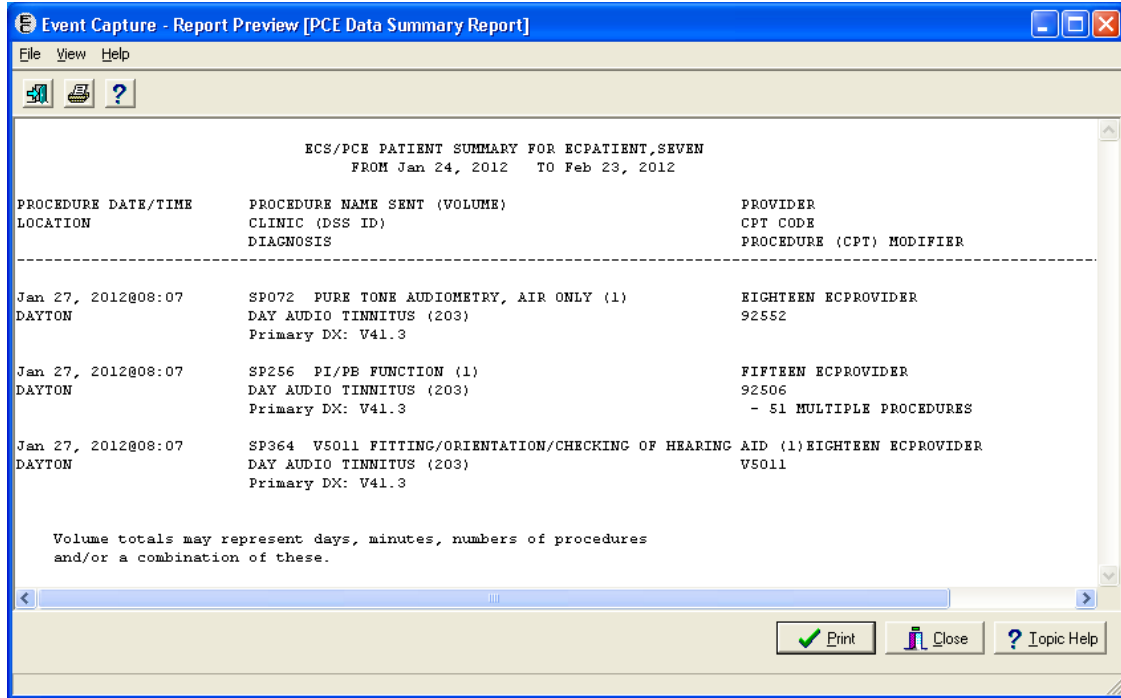
### Instructions

1. Enter a date range.
2. Use the Patient Identifier field to select a patient.
  - Enter one of the following:
    - Patient Name (whole or partial, last name first)
    - Social Security Number
    - Last four digits of the Patient Social Security Number
    - First character of Last Name plus the last four digits of the SSN with no spaces
  - Press <Enter> or the Search button. 
  - Choose from the list of patients displayed.
3. Export , Preview , Print  or Cancel  the report.

### Example: PCE Data Summary Report Required Information



**Example: PCE Data Summary Report from Print Preview**






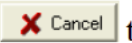
**Example: PCE Data Summary Report from Export**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R			
PCE Data Summary Report																				
PROCEDURE			DSS		CPT	PROCEDURE	PROCEDURE	PROCEDURE	CPT MOD	CPT	CPT	PRIMARY					2ND	2ND	2ND	2ND
PATIENT	DATE/TIME	LOCATION	CLINIC	ID	CODE	CODE	NAME	VOLUME	1	MOD 2	MOD 3	PROVIDER	DIAGNOSIS	DIAG 1	DIAG 2	DIAG 3	DIAG 4			
ECPATIENT, ONE	Feb 07, 2013@13:56	Cheyenne-ECU	CHY C&P NEURO	315	99499	SW001	CASE MANG IP/OP V15M	1	AF SPECIALTY PHYSICIAN			ELEVEN ECPROVIDER	900.9							

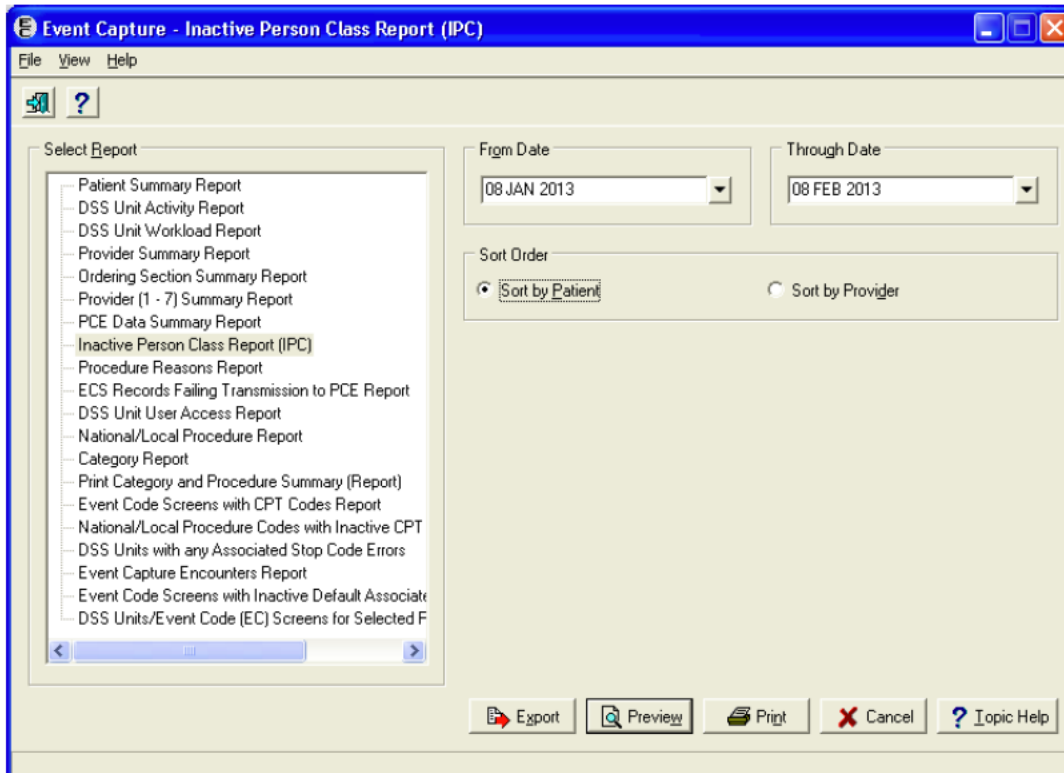
## 8.9 Inactive Person Class Report (IPC)

- This report shows providers who do not have a Person Class specified in the NEW PERSON file (#200) or who do not have an active Person Class in the NEW PERSON file (#200) for the date of the procedure.
- After previewing the report, the user has the option to print or close the report.

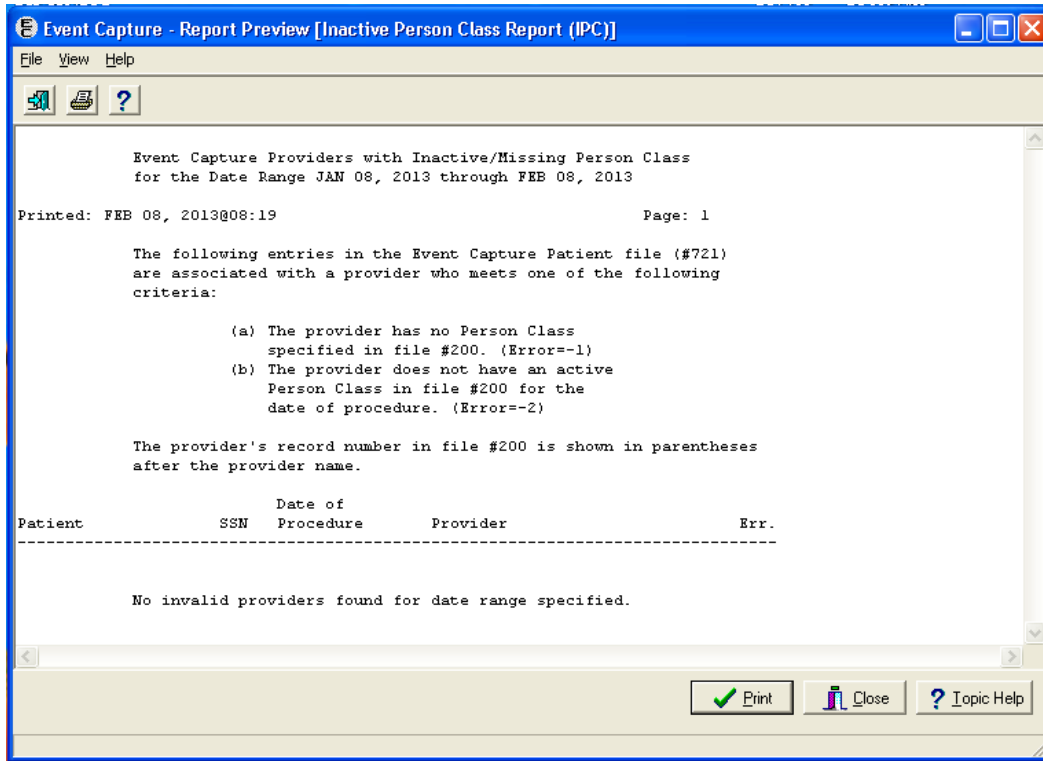
### Instructions

1. Enter a date range.
2. Select Sort by Patient or Sort by Procedure.
3. Export , Preview , Print  or Cancel  the report.  
**Note:** The column order does not change with Sort Method when exported into Excel.

### Example: Inactive Person Class Report Required Information



**Example: Inactive Person Class Report from Print Preview**







**Example: Inactive Person Class Report from Export**

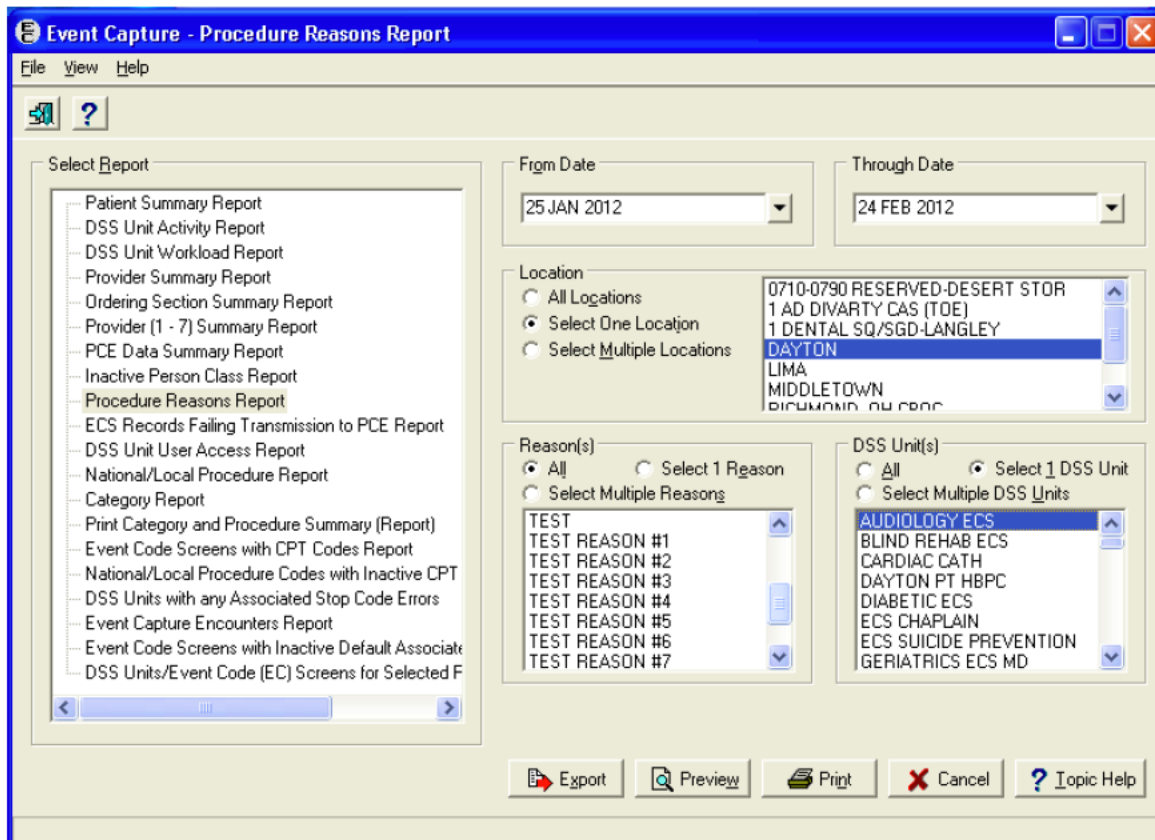
A	B	C	D	E	F
<b>Inactive Person Class Report (IPC)</b>					
<b>PATIENT NAME</b>	<b>SSN</b>	<b>PROCEDURE DATE</b>	<b>PROVIDER NAME</b>	<b>PROVIDER IEN #</b>	<b>ERROR</b>
ONE, ECPATIENT	1001	Feb 07, 2013@12:11	TWO, ECPROVIDER	XXXXXX	-1

## 8.10 Procedure Reasons Report

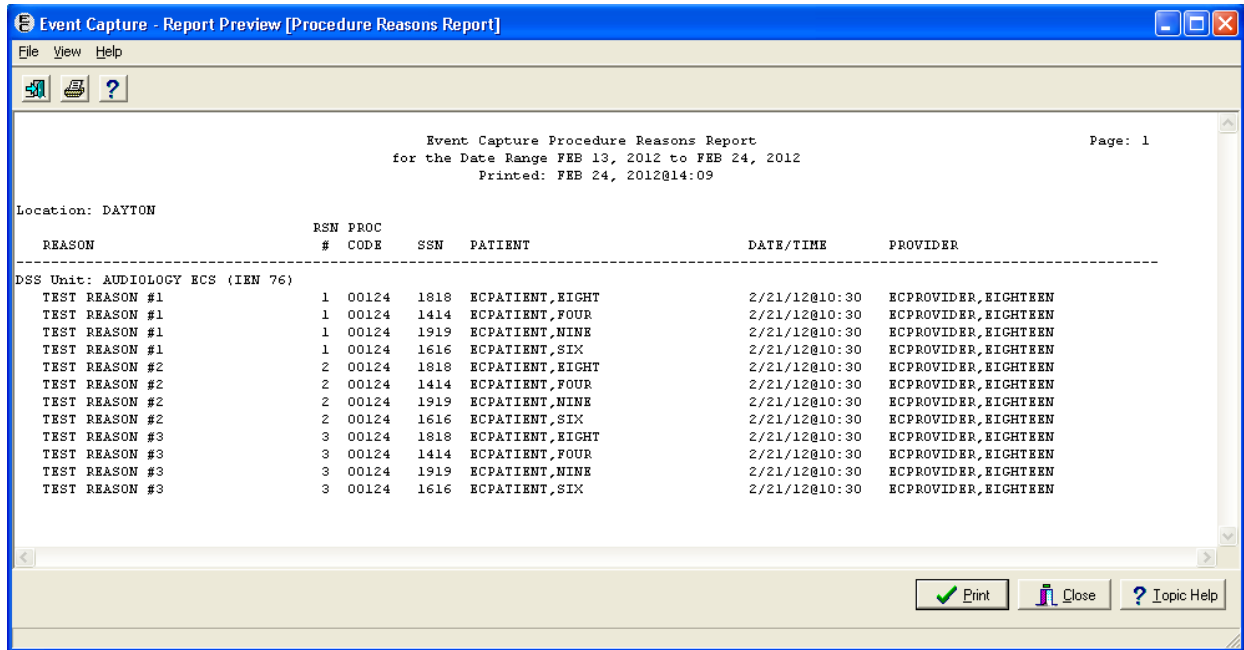
- Locations, DSS Units, procedures, and procedure reasons must be defined before using this option.
- With functionality put in place by the Code Set Versioning project, CPT codes, five-character EC National Codes (when applicable), CPT modifiers, diagnosis codes and their associated descriptions are reflective of the date the event occurred.
- After previewing the report, the user has the option to print or close the report.
- This report is exportable into an Excel spreadsheet. The tab in Excel is titled “Reasons” followed by the Date Range the user selected. The columns on the spreadsheet will include Location, DSS Unit, Reason Text, Reason Number, Procedure Code, SSN (last 4 digits), Patient, Date/Time and Provider.

### Instructions

1. Select a date range.
2. Select one, all or multiple Location(s).
3. Select one, all or multiple Procedure Reasons.
4. Select one, all or multiple DSS Unit(s).
5. Export  Export, Preview  Preview, Print  Print or Cancel  Cancel the report.



**Example: Procedure Reasons Report from Print Preview**



**Example: Procedure Reasons Report from Export**

A	B	C	D	E	F	G	H	I
Procedure Reasons Report		REASON	REASON	PROC				
LOCATION	DSS UNIT	TEXT	#	CODE	SSN	PATIENT	DATE/TIME	PROVIDER
Cheyenne-ECU	FL41 - NUTR OUTPATIENT	1REASON	1	S9449	0170	ECPATIENT,FIVE	1/31/13@13:00	ECPROVIDER,FIFTEEN
Cheyenne-ECU	FL41 - NUTR OUTPATIENT	REASON1	2	S9449	0170	ECPATIENT,FIVE	2/6/13@11:24	ECPROVIDER,ELEVEN
Cheyenne-ECU	FL41 - NUTR OUTPATIENT	REASON3	1	S9449	0177	ECPATIENT,SEVEN	1/31/13@13:07	ECPROVIDER,ELEVEN
Cheyenne-ECU	FL41 - NUTR OUTPATIENT	REASON3	1	S9449	0177	ECPATIENT,SEVEN	2/8/13@07:16	ECPROVIDER,NINE
Cheyenne-ECU	FL41 - NUTR OUTPATIENT	REASON5	2	S9449	0177	ECPATIENT,SEVEN	2/8/13@07:16	ECPROVIDER,NINE
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	1REASON	1	SW001	0150	ECPATIENT,NINE	1/31/13@13:05	ECPROVIDER,FIFTEEN
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	REASON1	1	SW001	0001	ECPATIENT,ONE	2/7/13@13:56	ECPROVIDER,ELEVEN
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	REASON2	2	SW001	0150	ECPATIENT,NINE	1/31/13@13:05	ECPROVIDER,FIFTEEN
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	REASON3	3	SW001	0150	ECPATIENT,NINE	1/31/13@13:05	ECPROVIDER,FIFTEEN

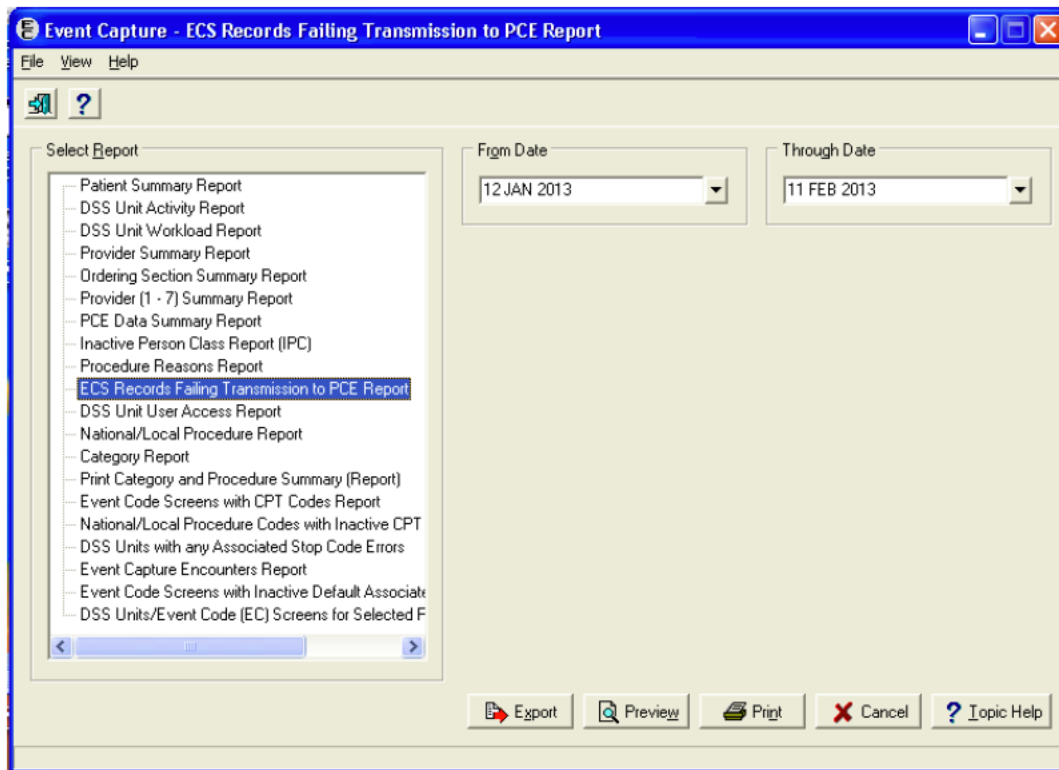
## 8.11 ECS Records Failing Transmission to PCE Report

- Locations, DSS Units, procedures, five-character EC National Codes (when applicable) and categories must be defined before using this option.
- After previewing the report, the user has the option to print or close the report.

### Instructions

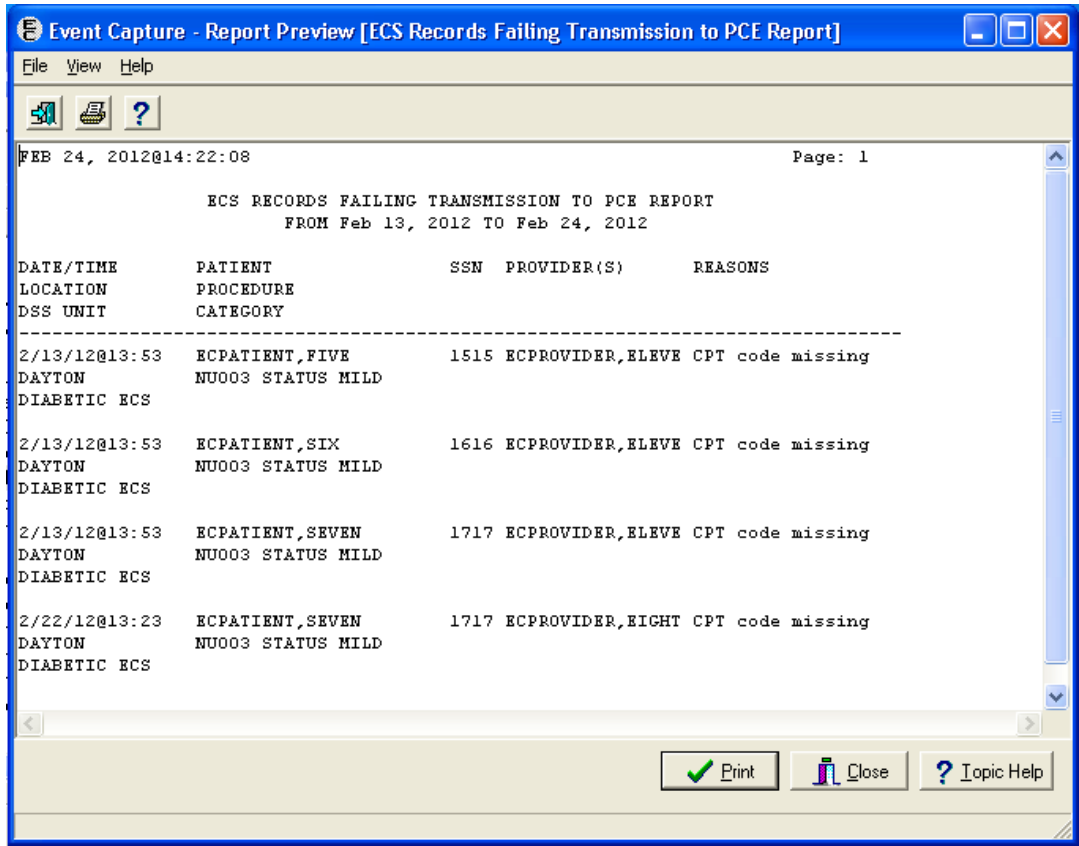
1. Select the date Range.
2. Export , Preview , Print  or Cancel  the report.

### Example: ECS Records Failing Transmission to PCE Report Required Fields





**Example: ECS Records Failing Transmission to PCE Report from Print Preview**



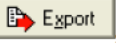



**Example: ECS Records Failing Transmission to PCE Report from Export**

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
DATE/ TIME	LOCATION	DSS UNIT	CATEGORY	PATIENT	SSN	PROCEDURE CODE	PROCEDURE NAME	PROV 1	PROV 2	PROV 3	PROV 4	PROV 5	PROV 6	PROV 7	REASON 1	REASON 2	REASON 3
2/13/12 @13.53	Dayton	Diabetic ECS		ECPATIENT, FIVE	1515	NU003	STATUS MILD	ECPROVIDER, ELEVEN							code missing		
2/13/12 @13.53	Dayton	Diabetic ECS		ECPATIENT, SIX	1616	NU003	STATUS MILD	ECPROVIDER, ELEVEN							CPT code		
2/13/12 @13.53	Dayton	Diabetic ECS		ECPATIENT, SEVEN	1717	NU003	STATUS MILD	ECPROVIDER, ELEVEN							CPT code		
2/13/12 @13.53	Dayton	Diabetic ECS		ECPATIENT, SEVEN	1717	NU003	STATUS MILD	ECPROVIDER, EIGHT							CPT code		

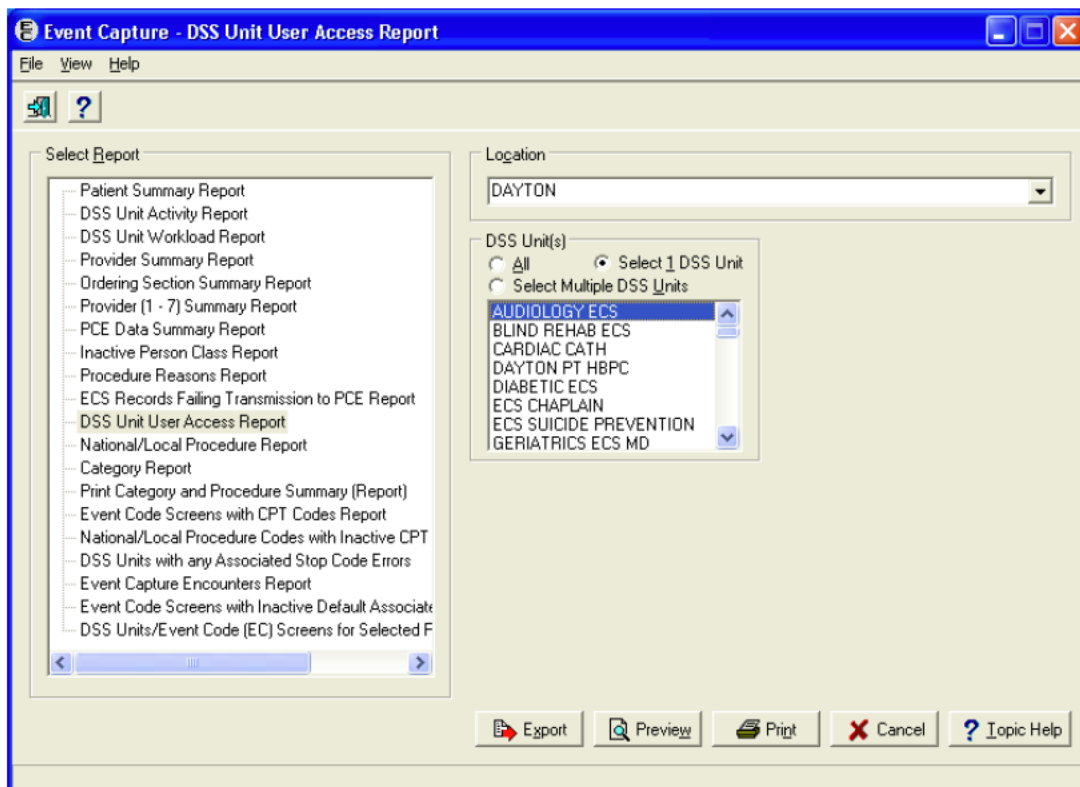
## 8.12 DSS Unit User Access Report

- This report is also accessible from the *Grant Users Access* menu option.
- After previewing the report, the user has the option to print or close the report.
- This report is now exportable into an Excel spreadsheet. The tab in Excel is titled “DSS Unit User Access Report”. The columns on the spreadsheet will include DSS Unit, User Name, IEN and Person Class/Classification.

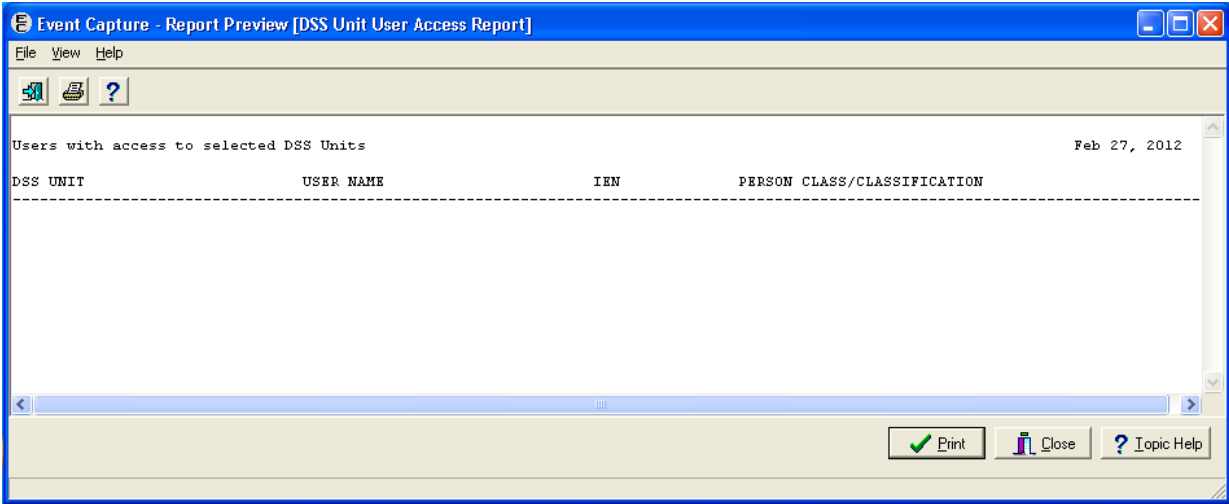
### Instructions:

1. Select a Location.
2. Select one, all or multiple DSS Units.
3. Export , Preview , Print  or Cancel  the report.

### Example: DSS Unit User Access Report Required Fields



**Example: DSS Unit User Access Report from Print Preview**






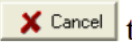
**Example: DSS Unit User Access Report from Export**

A	B	C	D
<b>DSS Unit User Access Report</b>			
<b>DSS UNIT</b>	<b>USER NAME</b>	<b>IEN</b>	<b>PERSON CLASS/CLASSIFICATION</b>
KINESIOTHERAPY ECS	USER1,EC	11X	Kinesiotherapist
KINESIOTHERAPY ECS	USER2,EC	22X	Kinesiotherapist
KINESIOTHERAPY ECS	USER3,EC	33X	Kinesiotherapist

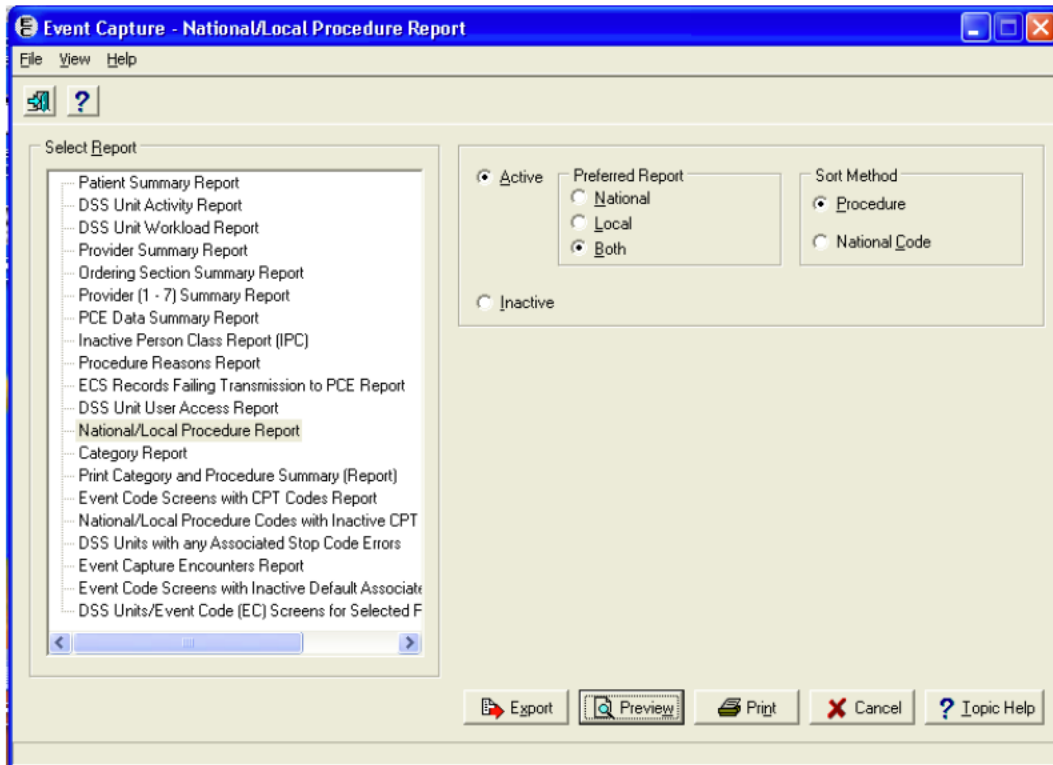
## 8.13 National/Local Procedure Report

- Use the *Procedure - Add or Update Local Procedures* option to create local procedures before using this option.
- This report is accessible to Management users only. For users without the Management Security key (ECMGR), this report will not appear.
- After previewing the report, the user has the option to print or close the report.

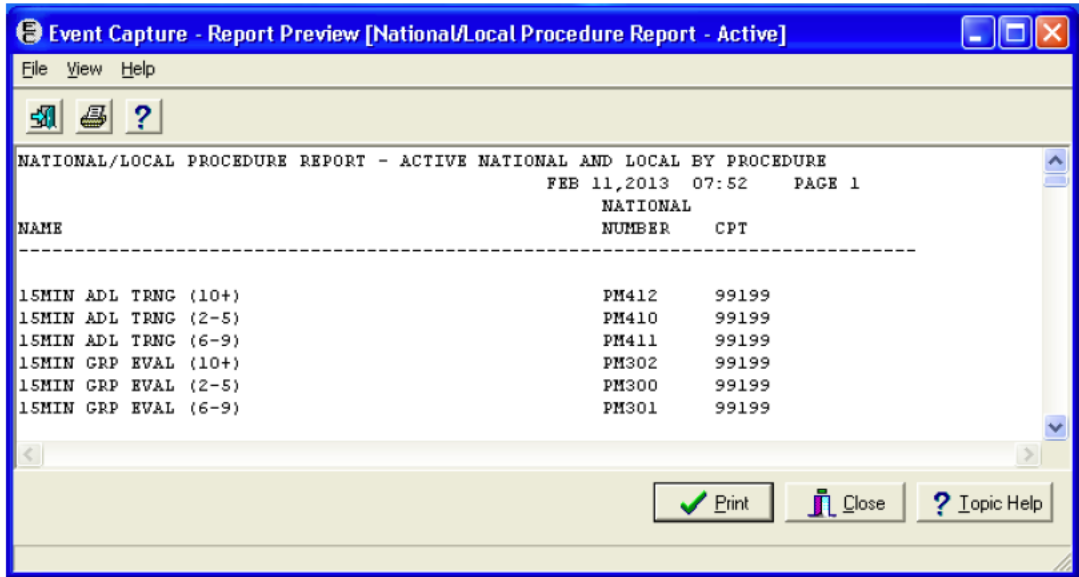
### 8.13.1 Instructions - Active Procedures

1. Click the **Active** button.
2. Choose Preferred Report (National, Local or Both).
3. Choose the Sort Method (Procedure or National Code).
4. Export , Preview , Print  or Cancel  the report.

#### Example: National/Local Procedure Report (Active) Requirements






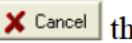
**Example: National/Local Procedure Report (Active) from Print Preview**



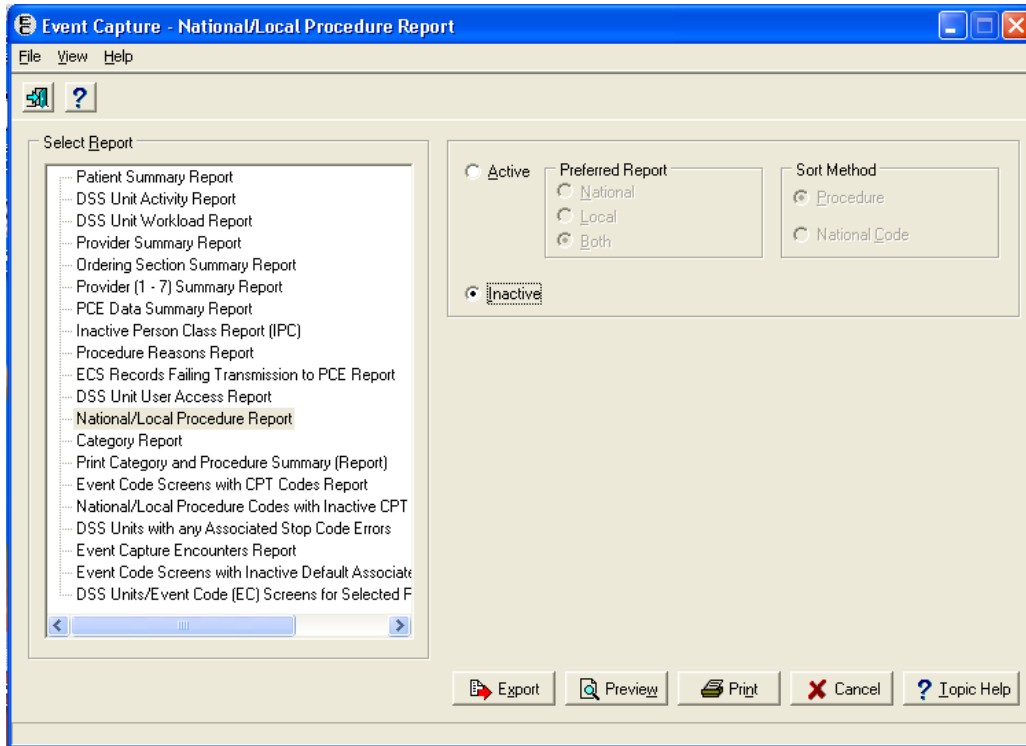
**Example: National/Local Procedure Report (Active) from Export**

A	B	C
National/Local Procedure Report		
NAME	NATIONAL NUMBER	CPT
15MIN ADL TRNG (10+)	PM412	99199
15MIN ADL TRNG (2-5)	PM410	99199
15MIN ADL TRNG (6-9)	PM411	99199
15MIN GRP EVAL (10+)	PM302	99199
15MIN GRP EVAL (2-5)	PM300	99199

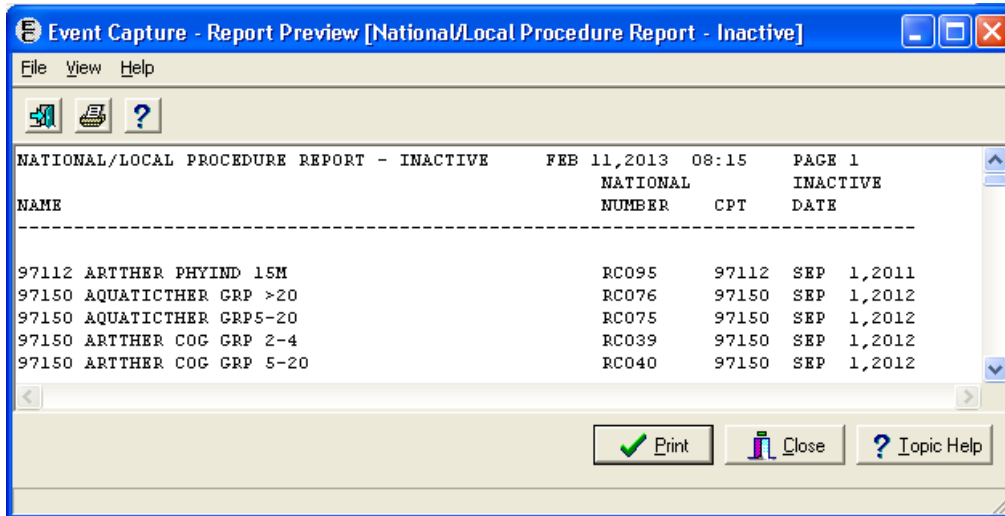
**8.13.2 Instructions - Inactive Procedures**

1. Click the **Inactive** button.
2. Export , Preview , Print  or Cancel  the report.  
**Note:** If the report is marked as Inactive, the preferred report and sort method will be grayed out.

**Example: National/Local Procedure Report (Inactive) Required Fields**



**Example: National/Local Procedure Report (Inactive) from Print Preview**






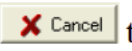
**Example: National/Local Procedure Report (Inactive) from Export**

A	B	C	D
<b>National/Local Procedure Report</b>			
NAME	NATIONAL NUMBER	CPT	INACTIVE DATE
97112 ARTTHER PHYIND 15M	RC095	97112	1-Sep-11
97150 AQUATICTHER GRP >20	RC076	97150	1-Sep-12
97150 AQUATICTHER GRP5-20	RC075	97150	1-Sep-12

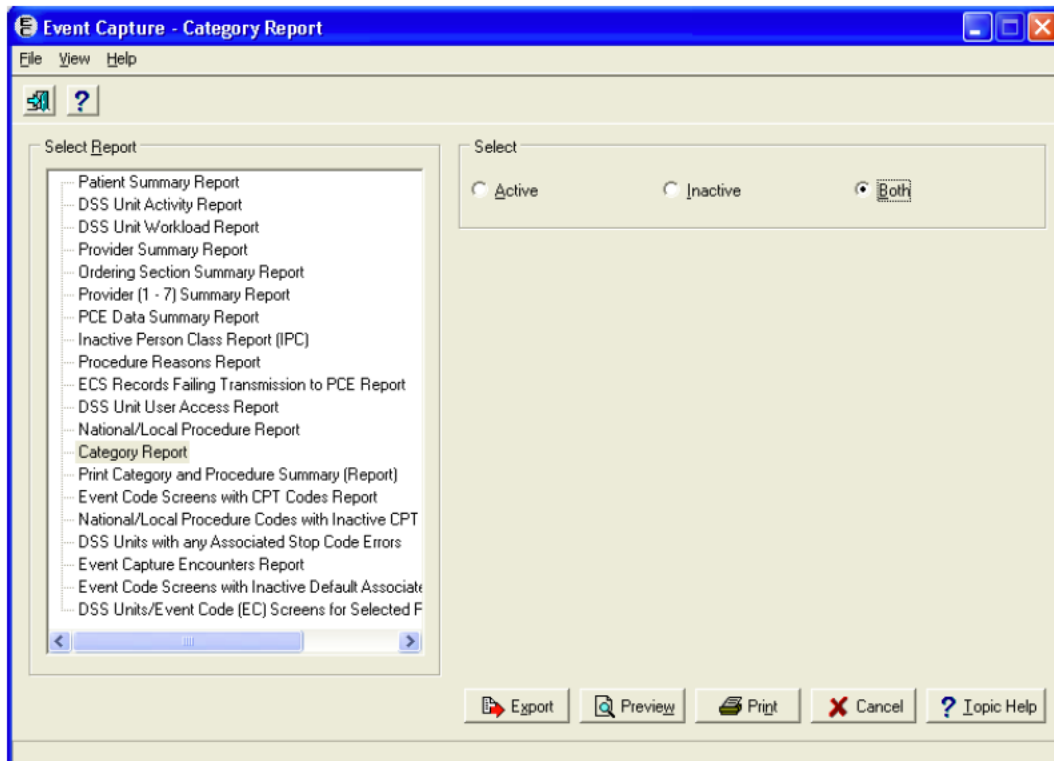
## 8.14 Category Report

- Use the *Category - Add or Update Categories* option to create categories before using this option.
- This report is accessible to Management users only. This report will not appear for users without the management security key (ECMGR).
- After previewing the report, the user has the option to print or close the report.

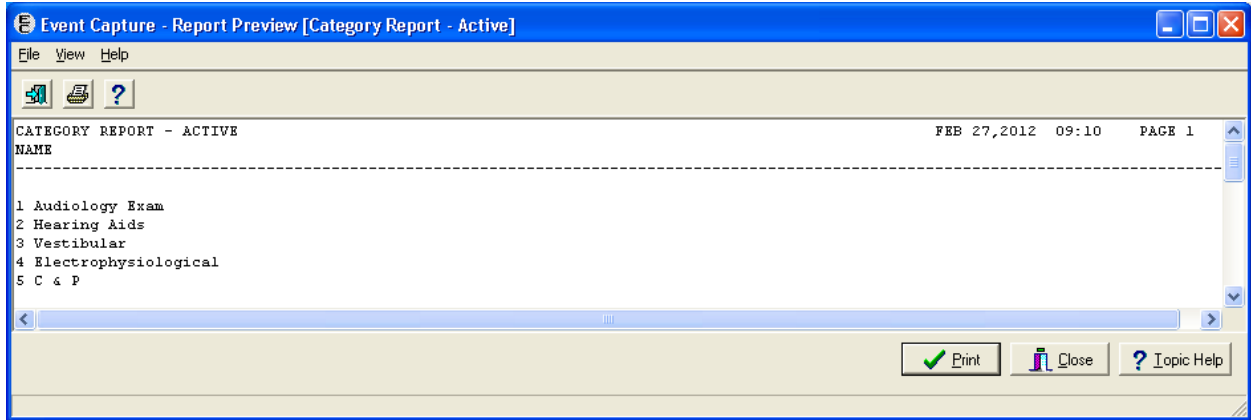
### Instructions

1. Choose a status of **Active**, **Inactive** or **Both**.
2. Export , Preview , Print  or Cancel  the report.

### Example: Category Report Required Fields



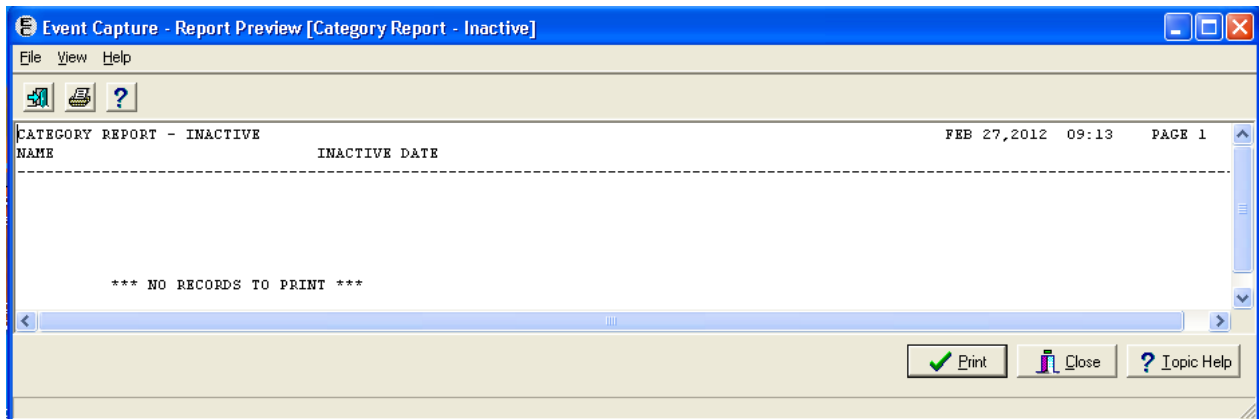
**Example – Category Report (Active) from Print Preview**



**Example – Category Report (Active) from Export**

A
Category Report
NAME
CARDIOLOGY
EQUIPMENT - RESPIRATORY
O&E

**Example – Category Report (Inactive) from Print Preview**

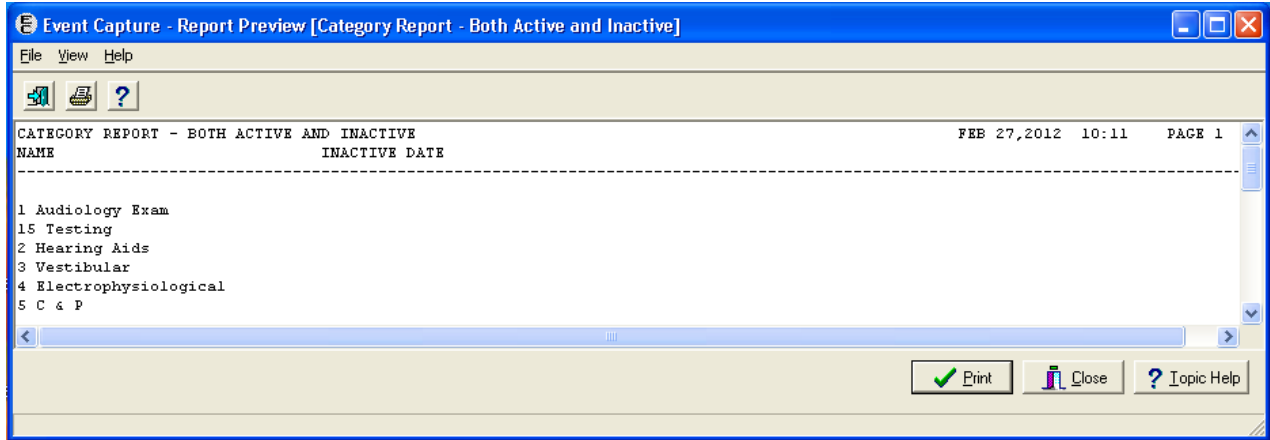


**Example – Category Report (Inactive) from Export**

A	B
Category Report	
NAME	INACTIVE DATE
THALLIUM	02/20/12



**Example – Category Report (Both Active and Inactive) from Print Preview**





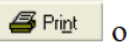
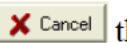
**Example – Category Report (Both Active and Inactive) from Export**

A	B
Category Report	
<b>NAME</b>	<b>INACTIVE DATE</b>
CARDIOLOGY	
EQUIPMENT - RESPIRATORY	
O&E	
THALLIUM	02/20/2012

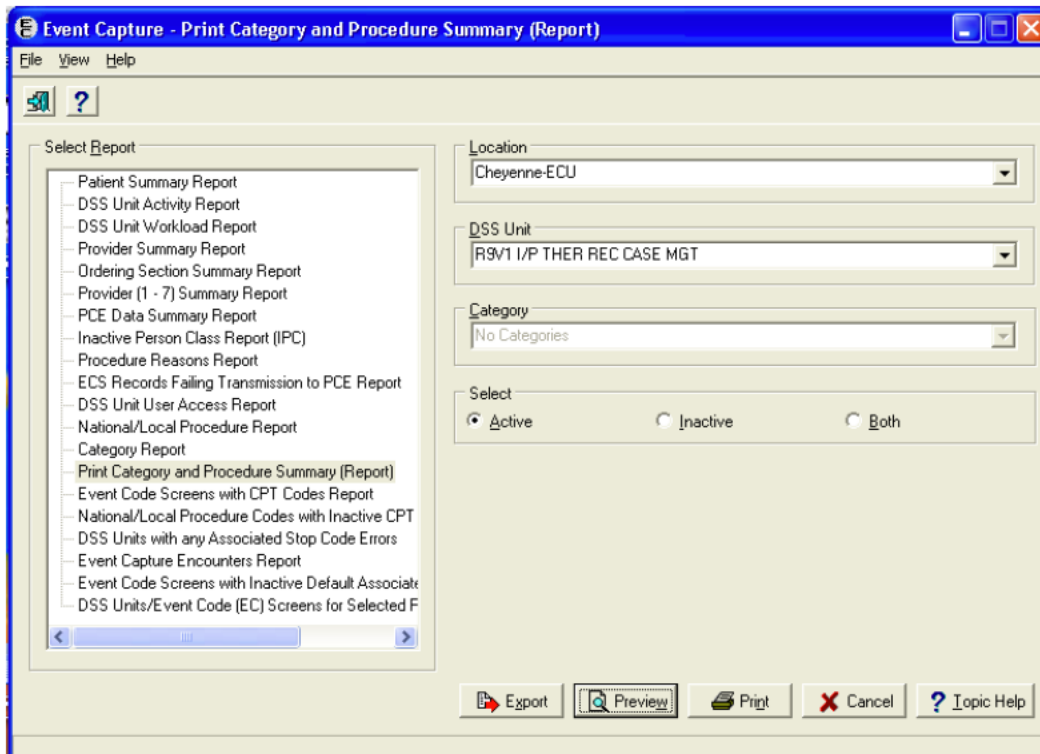
## 8.15 Print Category and Procedure Summary (Report)

- Use the *DSS Unit - Add or Update DSS Units* option to create DSS Units categories before using this option.
- Use the *Category - Add or Update Categories* option to create categories before using this option.
- Use the *Procedure - Add or Update Local Procedures* option to create procedures before using this option.
- This report is accessible to Management users only. This report will not appear for users without the management security key (ECMGR).
- After previewing the report, the user has the option to print or close the report.

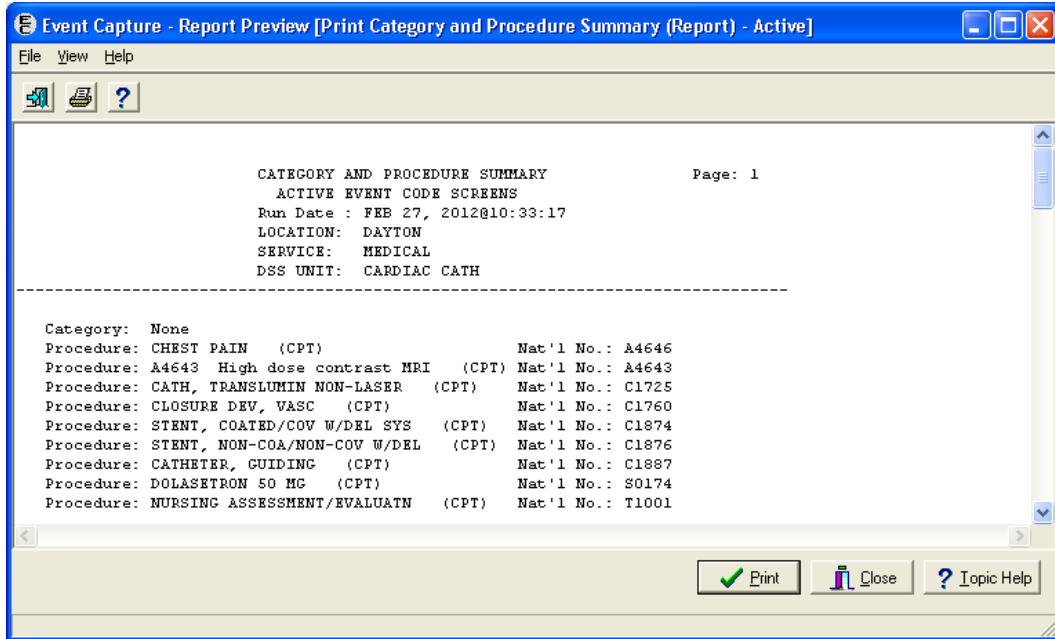
### Instructions

1. Select one or all Location(s).
2. Select one or all DSS Unit(s).  
**Note:** If All is selected for the DSS Unit, the Category will also be All and will be grayed out.
3. Select a Category.  
**Note:** Categories only appears if the Event Code Screen uses categories to group procedures.
4. Select Active, Inactive or Both (Active and Inactive) EC Code Screens.
5. Export , Preview , Print  or Cancel  the report.

### Example: Print Category and Procedure Summary (Report) Required Fields



**Example: Print Category and Procedure Summary (Report) from Print Preview**



**Example: Print Category and Procedure Summary (Report) from Export**

A	B	C	D	E	F	G	H	I	J
<b>Print Category and Procedure Summary (Report)</b>									
<b>ECSCREEN</b>				<b>DSS UNIT</b>	<b>CPT</b>	<b>PROCEDURE</b>			
<b>STATUS</b>	<b>LOCATION</b>	<b>SERVICE</b>	<b>DSS UNIT</b>	<b>INACTIVE</b>	<b>CATEGORY</b>	<b>CODE</b>	<b>CODE</b>	<b>PROCEDURE NAME</b>	<b>CLINIC</b>
ACTIVE	Cheyenne-ECU	RECREATION THERAPY	R9V1 I/P THER REC CASE MGT		None	99499	SW001	CASE MGT 15M	
ACTIVE	Cheyenne-ECU	RECREATION THERAPY	R9V1 I/P THER REC CASE MGT		None	99361		TEAM CONF W/O PAT, LIMITED 30M	
ACTIVE	Cheyenne-ECU	RECREATION THERAPY	R9V1 I/P THER REC CASE MGT		None	99362		TEAM CONF W/O PAT EXPANDED 60M	





## 8.16 Event Code Screens with CPT Codes Report

- Users can print, preview or export Event Code Screens with active and/or inactive CPT codes for one or all DSS Unit(s).
  - For previewing or printing the report, when Both is selected for Active and Inactive CPT codes, all inactive CPT codes are flagged with an \*I\* indicator.
  - For exporting the report, all Inactive CPT codes are flagged with an \*\*Inactive\*\* indicator.
- Users must have the ECMGR key to access this report.
- After previewing the report, the user has the option to print or close the report.

### Instructions

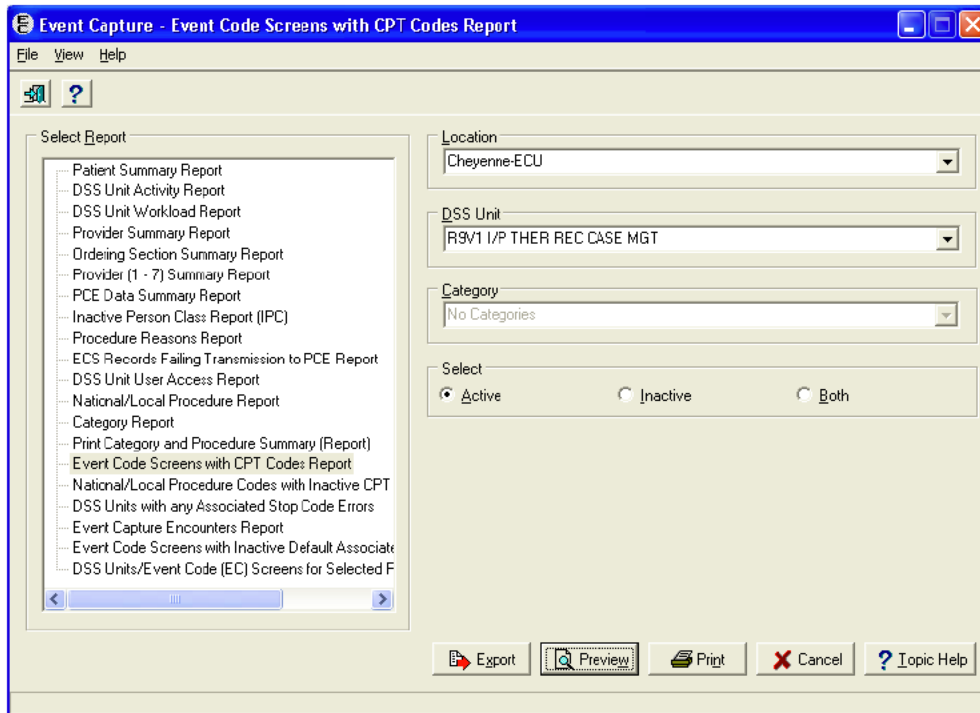
1. Select one or all Location(s).
2. Select one or all DSS Unit(s).
 

**Note:** If All is selected for the DSS Unit, the Category will also be All and will be grayed out.
3. Select a Category.
 

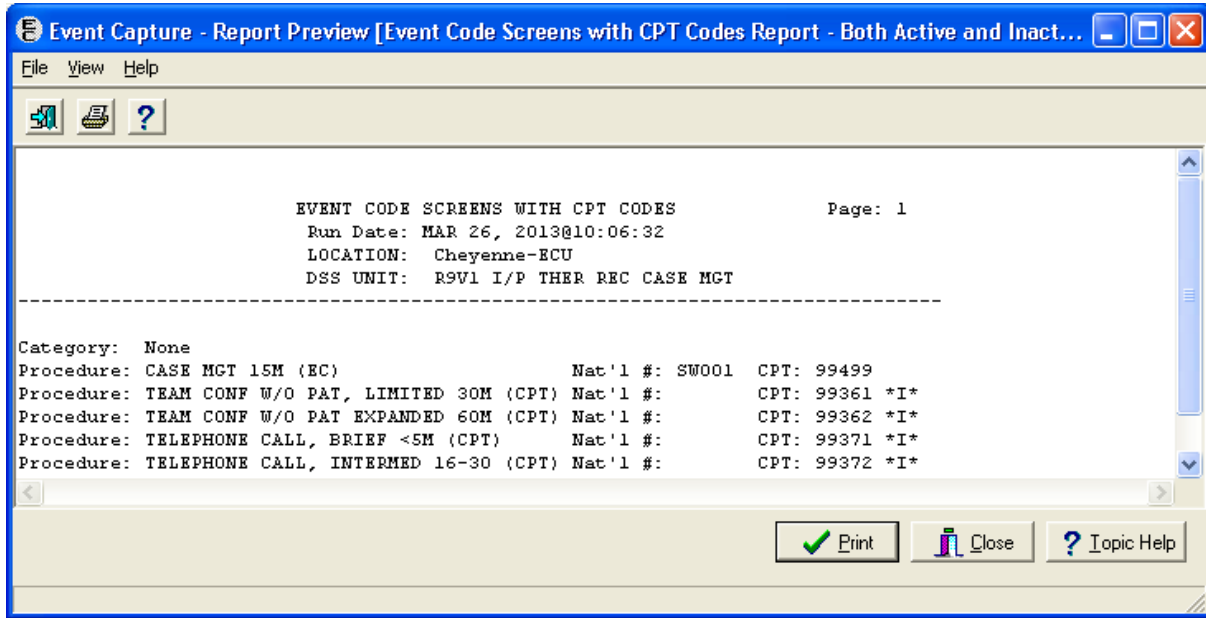
**Note:** Categories only appear if the Event Code Screen uses categories to group procedures.
4. Select Active, Inactive or Both (Active and Inactive) for CPT Codes.
5. Export , Preview , Print  or Cancel  the report.
 

**Note:** The tab of the report indicates whether the exported report shows only active, only inactive, or both active and inactive CPT codes.

### Example: Event Code Screens with CPT Codes Report Required Fields



**Example: Event Code Screens with CPT Codes Report from Print Preview (Both IPT Codes Selected)**



**Example: Event Code Screens with CPT Codes Report from Export**



Event Code Screens with CPT Codes Report					
LOCATION	DSS UNIT	CATEGORY	CPT CODE	PROCEDURE CODE	PROCEDURE NAME
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	None	99361 **Inactive**		TEAM CONF W/O PAT, LIMITED 30M (CPT)
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	None	99362 **Inactive**		TEAM CONF W/O PAT EXPANDED 60M (CPT)
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	None	99371 **Inactive**		TELEPHONE CALL, BRIEF <5M (CPT)
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	None	99372 **Inactive**		TELEPHONE CALL, INTERMED 16-30M (CPT)
Cheyenne-ECU	R9V1 I/P THER REC CASE MGT	None	99373 **Inactive**		TELEPHONE CALL, COMPLEX >30M (CPT)

The tab of the report above indicates that the report is “showing only Inactive CPT Codes”.

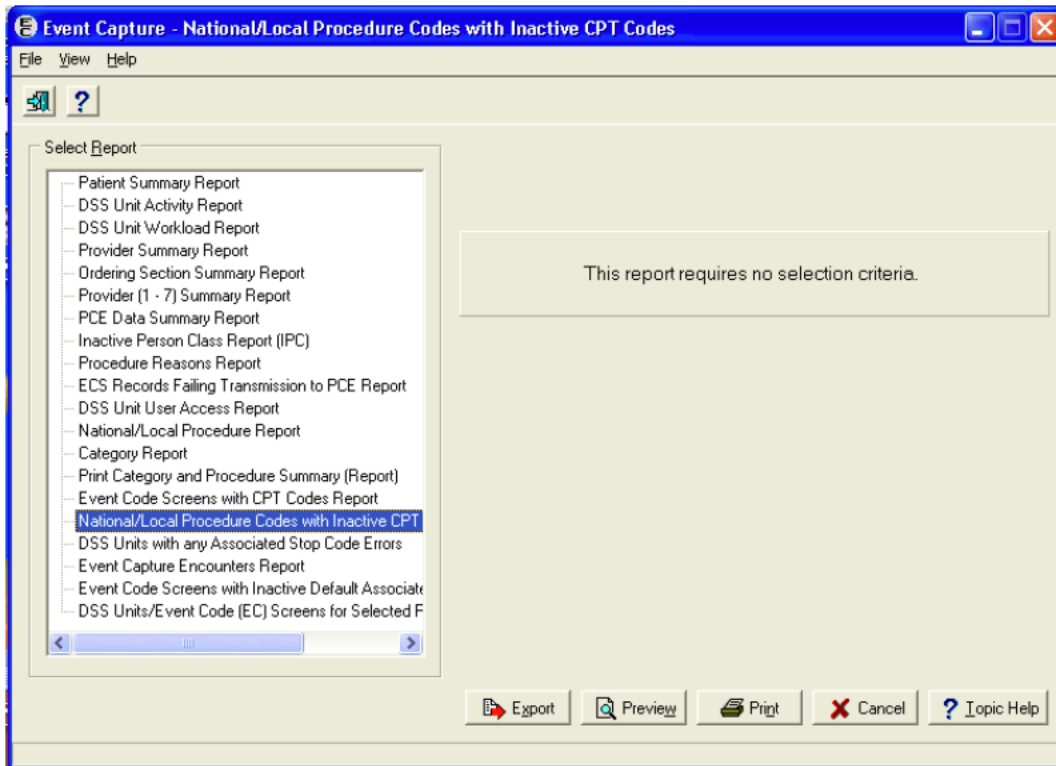
## 8.17 National/Local Procedure Codes with Inactive CPT Codes

- This report provides a list of National and Local Procedure Codes with inactive CPT codes from EC NATIONAL PROCEDURE file (#725).
- Users must have the ECMGR key to access this report.
- After previewing the report, the user has the option to print or close the report.

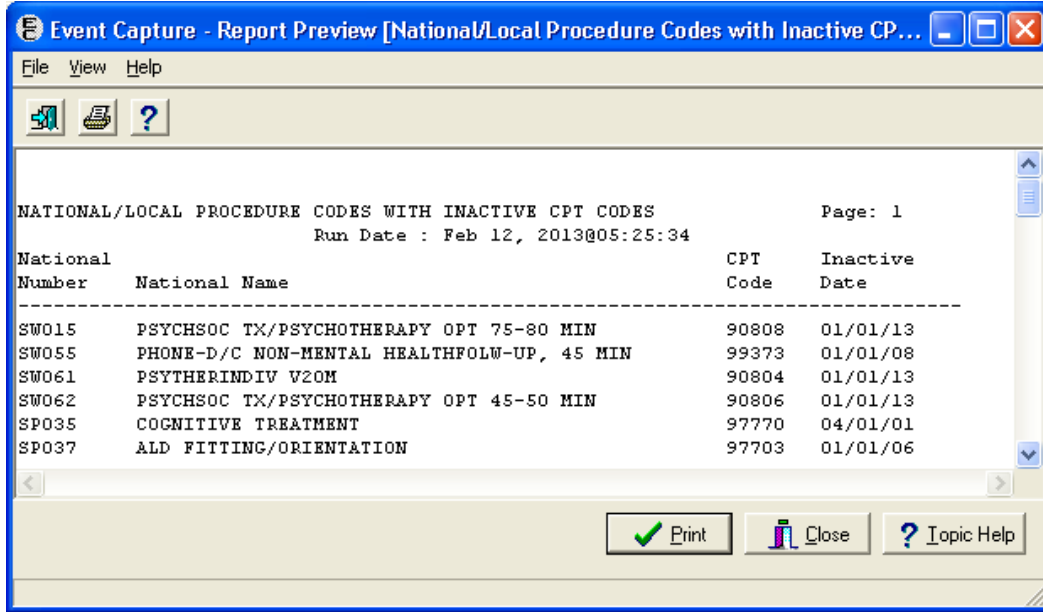
### Instructions

1. Select the report.
2. Export , Preview , Print  or Cancel  the report.

### Example: National/Local Procedure Codes with Inactive CPT Codes



**Example: National/Local Procedure Codes with Inactive CPT Codes from Print Preview**



**Example: National/Local Procedure Codes with Inactive CPT Codes from Export**

A	B	C	D
National/Local Procedure Codes with Inactive CPT Codes			
NATIONAL		CPT	INACTIVE
NUMBER	NATIONAL NAME	CODE	DATE
SW015	PSYCHSOC TX/PSYCHOTHERAPY OPT 75-80 MIN	90808	1/1/2013
SW055	PHONE-D/C NON-MENTAL HEALTHFOLW-UP, 45 MIN	99373	1/1/2008
SW061	PSYTHERINDIV V20M	90804	1/1/2013
SW062	PSYCHSOC TX/PSYCHOTHERAPY OPT 45-50 MIN	90806	1/1/2013
SP035	COGNITIVE TREATMENT	97770	4/1/2001
SP037	ALD FITTING/ORIENTATION	97703	1/1/2006

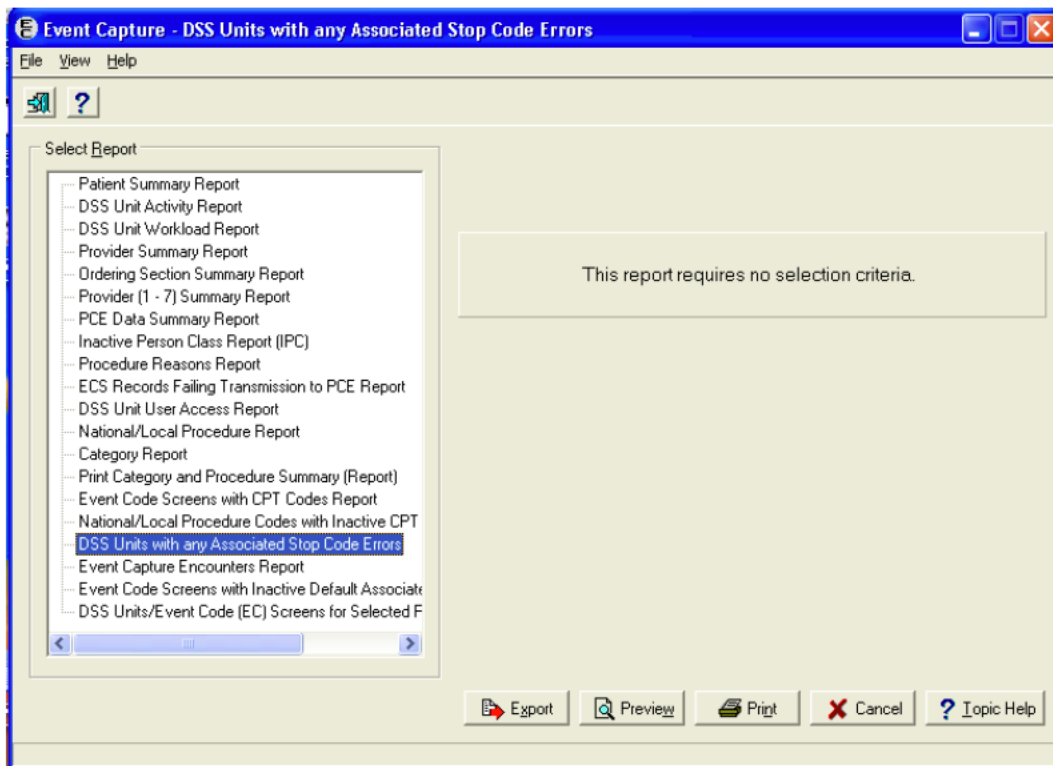
## 8.18 DSS Units with any Associated Stop Code Errors

- The Event Capture software restricts DSS-only workload to use valid Stop Codes.
- To assist sites in locating DSS Units that have invalid associated Stop Codes, the DSS Unit list with Secondary Associated Stop Codes option is provided. This may be attached as a secondary menu option and run as often as needed. The only prompt is for Device.
- This report provides a list of DSS Units with any error with the Associated Stop Code.
- The report provides the DSS Unit IEN and name, Associated Stop Code IEN and name and the reason for the error.
- After previewing the report, the user has the option to print or close the report.
- Select an active non-secondary Stop Code to replace the Stop Code in the DSS Unit set up.

### Instructions

1. Select the report.
2. Export , Preview , Print  or Cancel  the report.

### Example: DSS Units with Any Associated Stop Code Errors Required Fields





**Example: DSS Units with any Associated Stop Code Errors**

-----  
 DSS UNITS WITH ANY ASSOCIATED STOP CODE ERRORS

Page: 1

Run Date: 11/3/2011@14:25

-----

DSS Unit: 21 E-PUBLIC HEALTH NURSES-IP

Stop Code: 122 PUBLIC HEALTH NURSING

Reason: INACTIVE CODE





**Example: DSS Units with any Associated Stop Code Errors from Export**

A	B	C	D	E	F	G
DSS Units with any Associated Stop Code Errors						
DSS UNIT #	DSS UNIT NAME	STOP CODE	STOP CODE NAME	ERROR #1	ERROR #2	ERROR #3
21	E-PUBLIC HEALTH NURSES_IP	122	PUBLIC HEALTH NURSING	INACTIVE CODE		

## 8.19 Event Capture Encounters Report

- Displays and counts the unique occurrences by patient and DSS Unit during a selected date range. It also allows sorting by patient or by provider.
  - When sorted by Patient shows the number of unique occurrences for the Patient across the date range that is selected.
  - When sorted by Provider shows the number of unique occurrences for the Provider across the date range that is selected.
- Includes the fields Patient Name, SSN (last 4 digits), Inpatient or Outpatient (I/O), Date/Time, Provider #1, DSS Unit and Volume.
- After previewing the report, the user has the option to print or close the report.

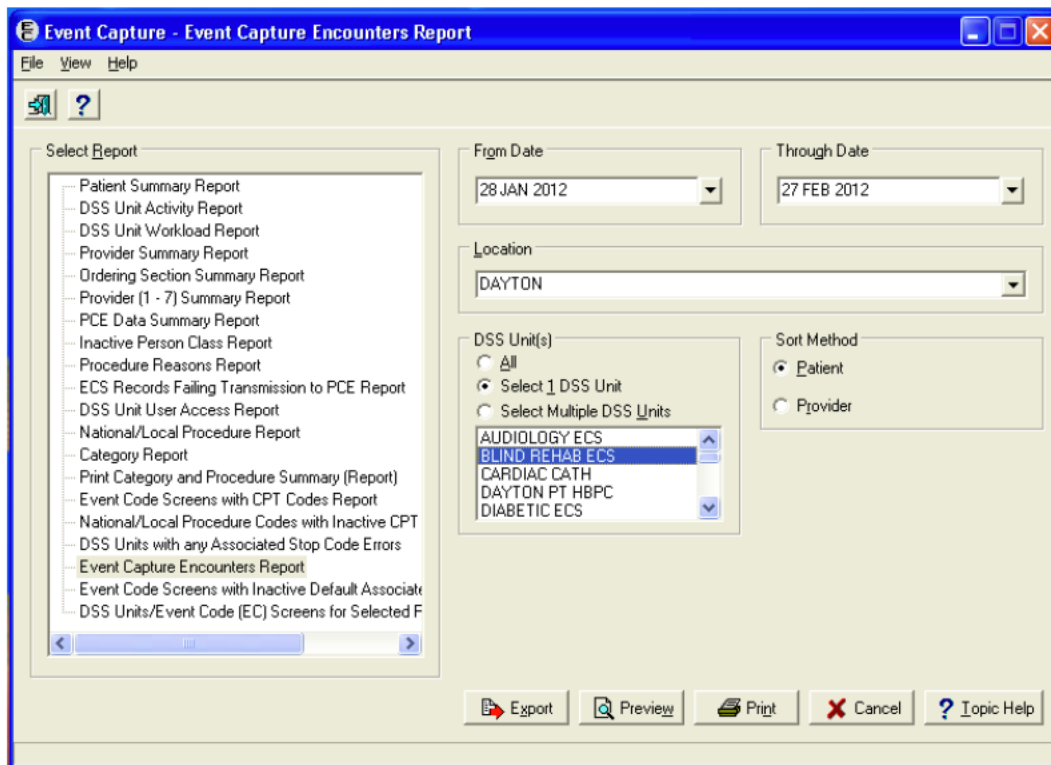
### Instructions:

1. Select a date range.
2. Select a Location.
3. Select one, all or multiple DSS Unit(s).
4. Select Sort Method (Patient or Provider).
5. Export , Preview , Print  or Cancel  the report.

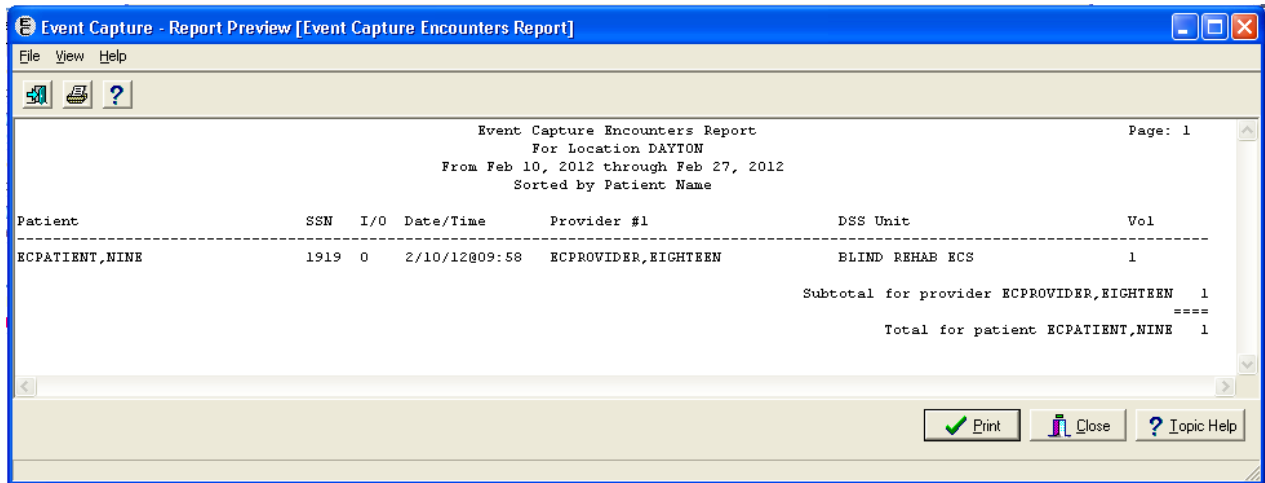
**Note:** Only the last four digits of the patient’s SSN will appear on the print preview of this report.

**Note:** The column order does not change with Sort Method when exported into Excel.

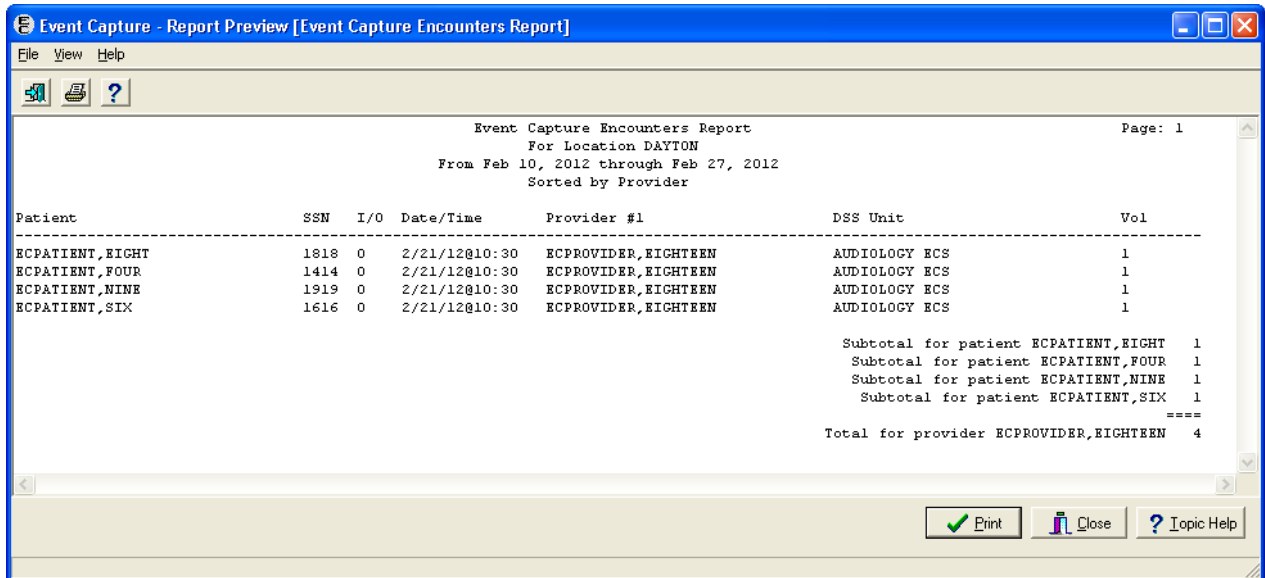
### Example: Event Capture Encounters Report Required Fields



**Example: Event Capture Encounters Report Sorted by Patient from Print Preview**



**Example: Event Capture Encounters Report Sorted by Provider from Print Preview**







**Example: Event Capture Encounters Report from Export**

A	B	C	D	E	F	G	H
Event Capture Encounters Report							
LOCATION	PATIENT	SSN	I/O	DATE/TIME	PROVIDER #1	DSS UNIT	VOLUME
Cheyenne-ECU	ECPATIENT,NINE	666010150	O	1/31/13@13:05	ECPROVIDER,FIFTEEN	R9V1 I/P THER REC CASE MGT	1
Cheyenne-ECU	ECPATIENT,ONE	666000001	O	2/7/13@13:56	ECPROVIDER,ELEVEN	R9V1 I/P THER REC CASE MGT	1

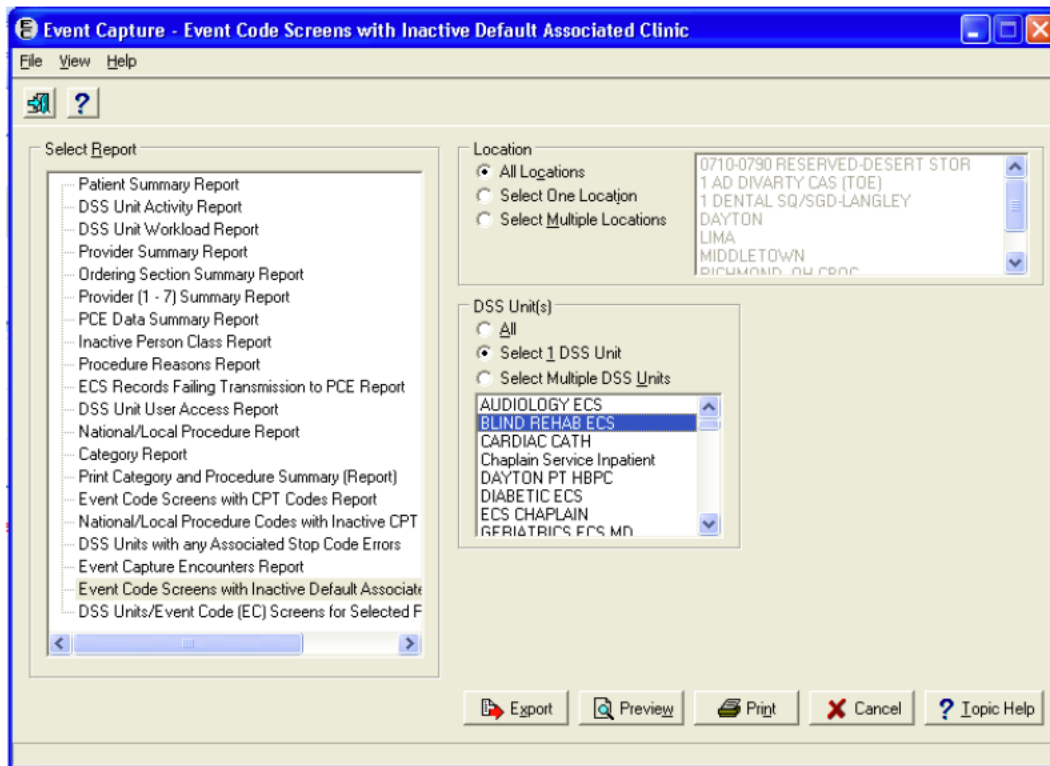
## 8.20 Event Code Screens with Inactive Default Associated Clinic

- Only holders of the ECMGR security key can run this report.
- After previewing the report, the user has the option to print or close the report.
- This report is now exportable into an Excel spreadsheet. The tab in Excel is titled “Inactive Default Clinic”. The columns on the spreadsheet will include DSS Unit, Location, Category, Procedure Code, Inactive Clinic IEN and Inactive Clinic Name.
- The fields DSS Units, Location, Category, Procedure Code, Clinic IEN and Clinic Name are included in this report.

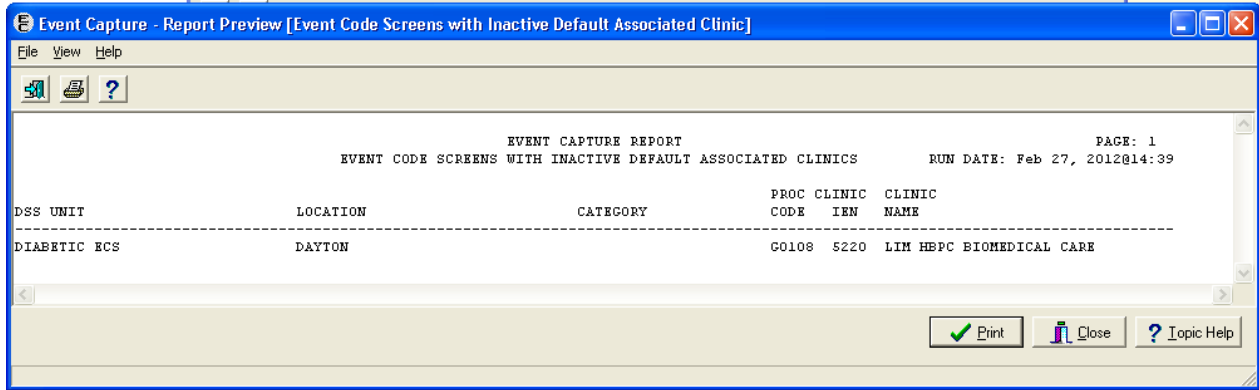
### Instructions:

1. Select one, all or multiple Location(s).
2. Select one, all or multiple DSS Unit(s).
3. Export , Preview , Print  or Cancel  the report.

### Example: Event Code Screens with Inactive Default Associated Clinic



**Example: Event Code Screens with Inactive Default Associated Clinic from Print Preview**






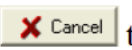
**Example: Event Code Screens with Inactive Default Associated Clinic from Export**

A	B	C	D	E	F
DSS UNIT	LOCATION	CATEGORY	PROCEDURE CODE	INACTIVE CLINIC IEN	INACTIVE CLINIC NAME
DIABETIC ECS	DAYTON		G0108	5220	LIM HBPC BIOMEDICAL CARE

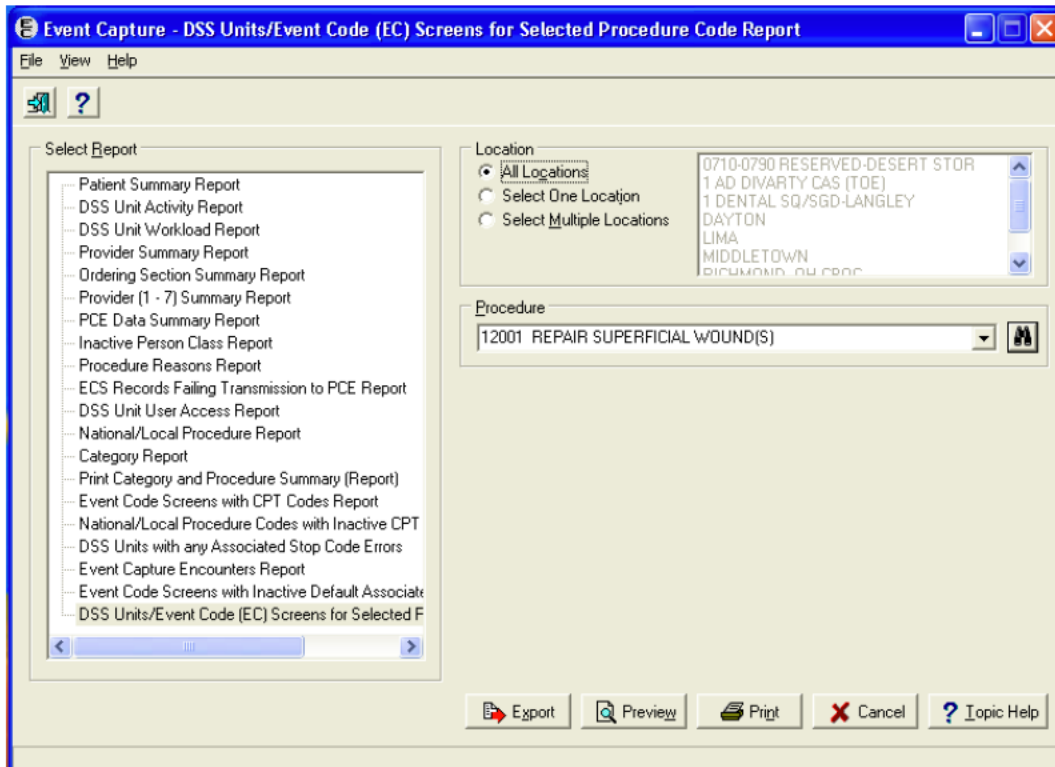
## 8.21 DSS Units/Event Code (EC) Screens for Selected Procedure Code Report

- Only holders of the ECMGR security key can run this report.
- After previewing the report, the user has the option to print or close the report.
- This report is now exportable into an Excel spreadsheet. The tab in Excel is titled “Selected Procedure Code”. The columns on the spreadsheet will include Procedure Code, Procedure Name, DSS Unit IEN, DSS Unit, Location, Category and EC Screen Status.
- The fields DSS IEN, DSS Unit Name, Location, Category and EC Screen Status are included in this report.

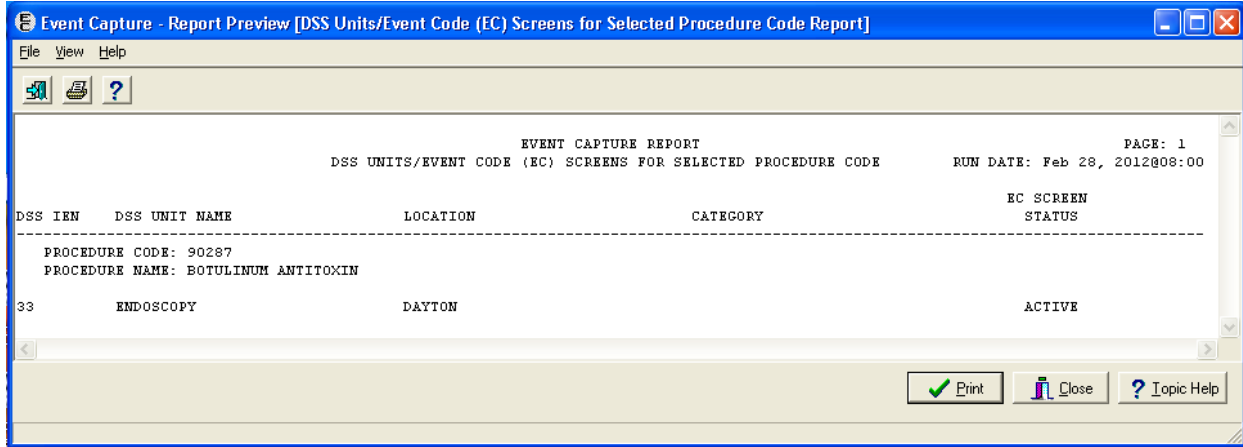
### Instructions:

1. Select one, all or multiple Location(s).
2. Select a Procedure.
3. Export , Preview , Print  or Cancel  the report.

### Example: DSS Units/Event Code (EC) Screens for Selected Procedure Code Report Required Fields



**Example: DSS Units/Event Code (EC) Screens for Selected Procedure Code Report from Print Preview**



**Example: DSS Units/Event Code (EC) Screens for Selected Procedure Code Report from Export**

A	B	C	D	E	F	G
PROCEDURE CODE	PROCEDURE NAME	DSS UNIT IEN	DSS UNIT	LOCATION	CATEGORY	EC SCREEN STATUS
90287	BOTULINUM ANTITOXIN	33	ENDOSCOPY	DAYTON		ACTIVE

## 9 Management Menu

The DSS *Management Menu* is available for users with the ECMGR security key. The main menu in the *Management Menu* provides the following management functions:

*Location* – Update Location Information

*DSS Unit* – Add or Update DSS Units

*Access by User* – Grant Access to DSS Units by User

*Category* – Add or Update Categories

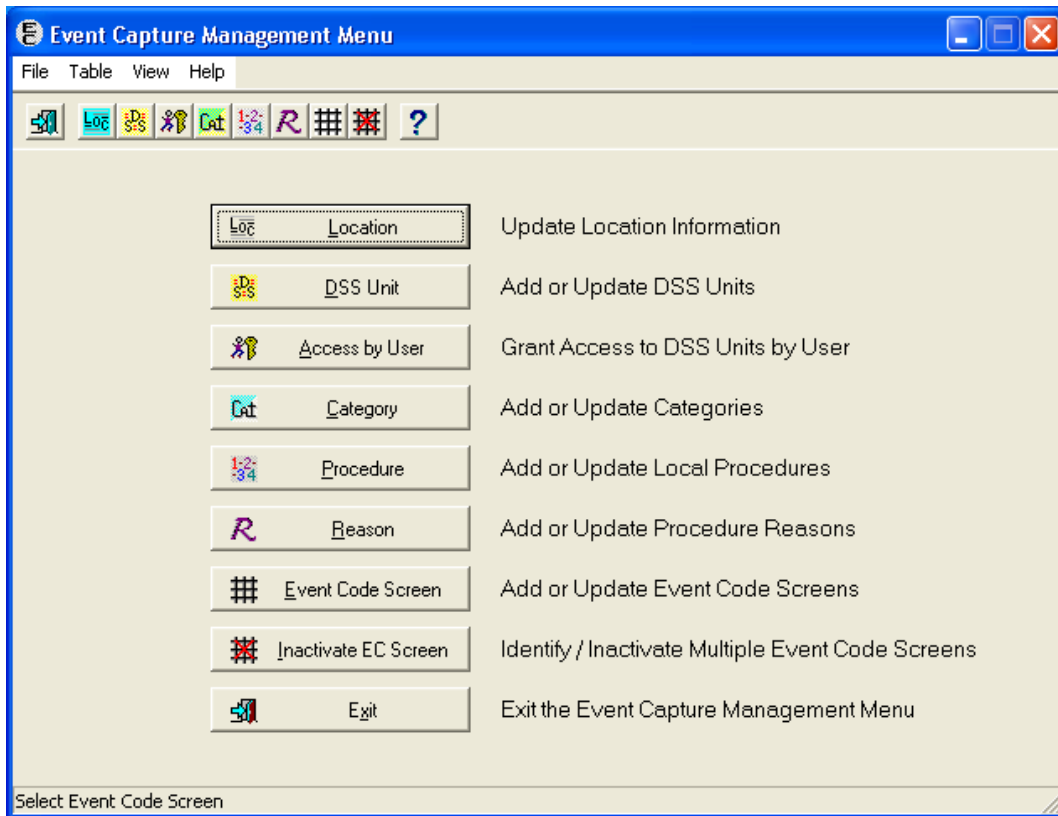
*Procedure* – Add or Update Local Procedures

*Reason* – Add or Update Procedure Reasons

*Event Code Screen* – Add or Update Event Code Screens

*Inactivate EC Screen* – Identify/Inactivate Multiple Event Code Screens

### Example: Event Capture Management Main Menu



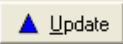


## 9.1 Location - Update Location Information

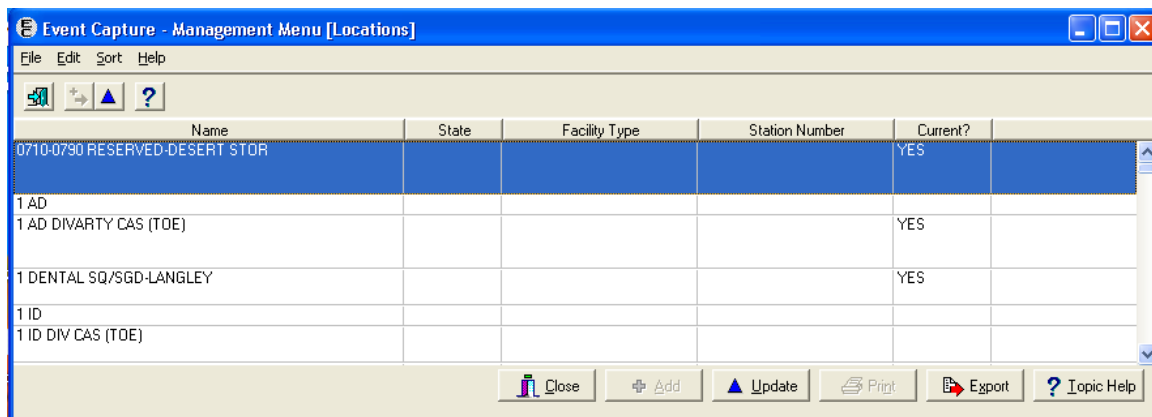
### Before the User Starts

- Location selected must be in the INSTITUTION file (#4).
- Locations must be created with this option before the user can establish DSS Units. No further options are functional until the user creates an Event Capture location.

### What the User Will See

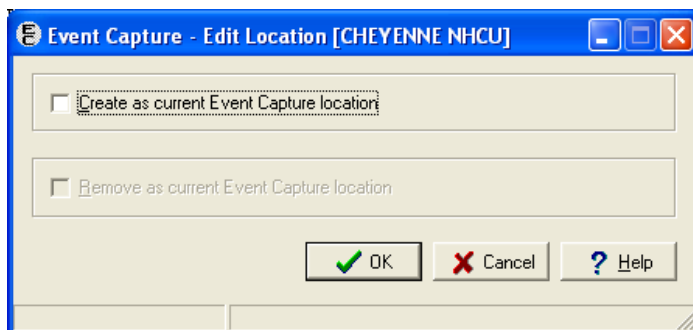
- Selecting the *Location - Update Location Information* option opens a screen that displays all the known location names, State, Facility Type, Station Number and Current Status in matrix form. Column size of the matrix is adjustable.
- From the first screen double-click on a row or highlight a row and click the Update  button.

### Example: Management Menu [Locations] Screen



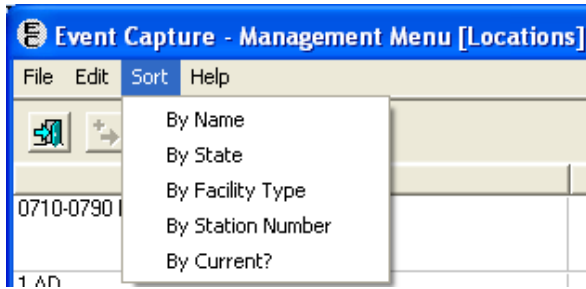
After selecting a location, a second screen will appear where you may create the location as current or remove the selected location.

### Example: Edit Location Screen



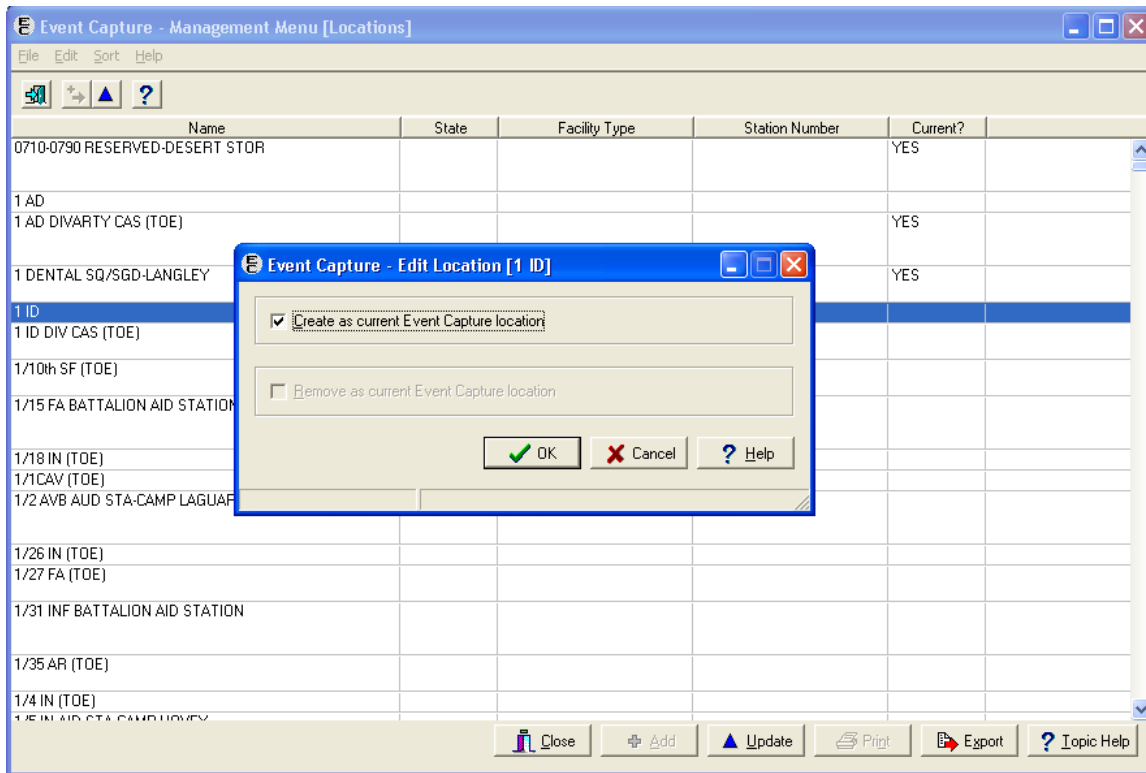
The rows can be sorted by using the *Sort* menu or by clicking on the column header.

**Example: Sort Menu Options**



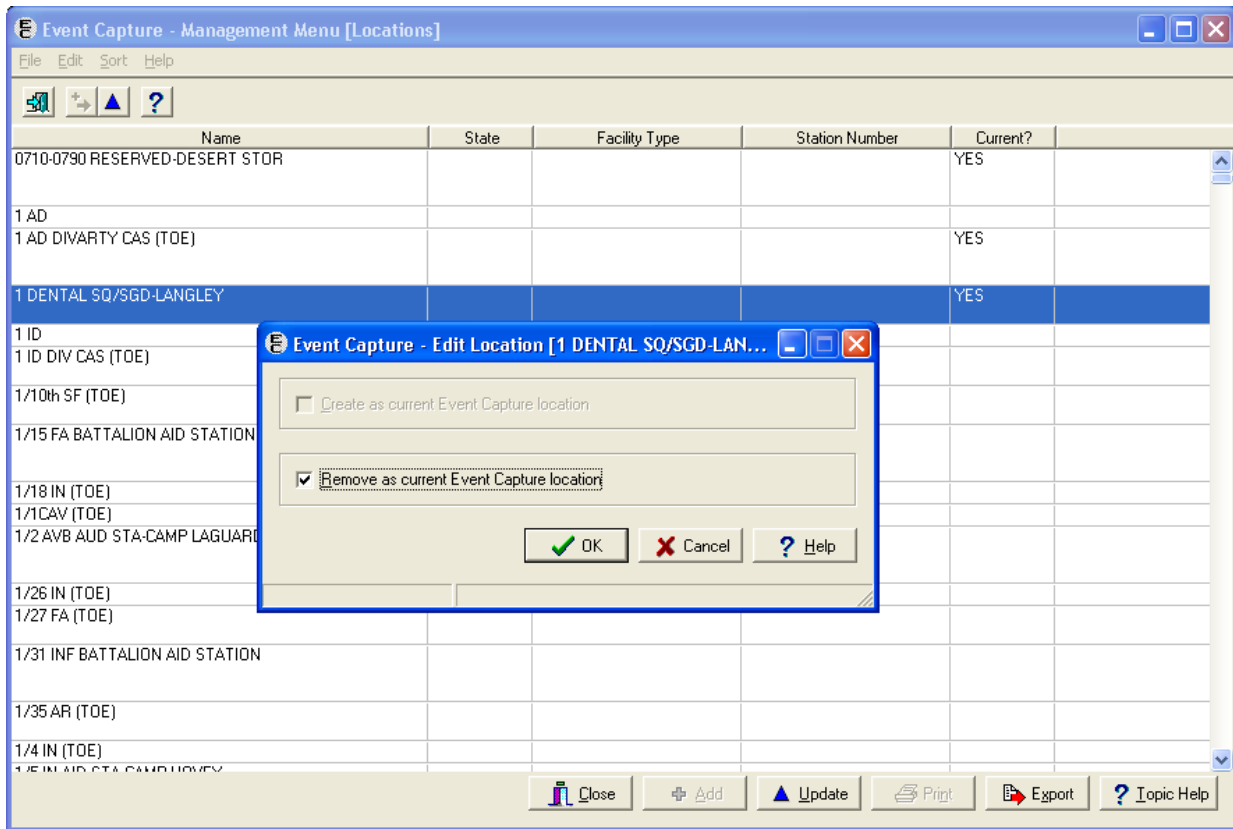
To **create** a current location, click the checkbox labeled “Create as current Event Capture location” and click the **OK** button. The location is “flagged” as active for use in the Event Capture software.

**Example: Creating a Current Location**



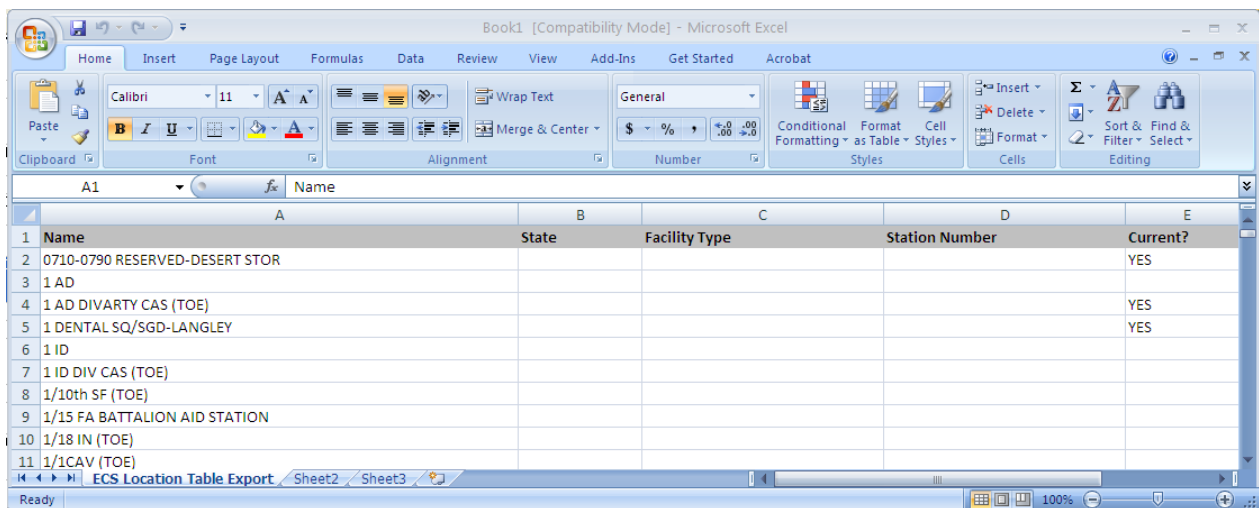
To **remove** a current location, click the checkbox labeled “Remove as current Event Capture location” and click the **OK** button. The location is “flagged” as inactive for use in the Event Capture software.

**Example: Removing a Current Location**



Select the **Export** button to export the Locations listing to Excel and the tab in Excel is titled “ECS Location Table Export”.

**Example: ECS Location Table Export from Excel**





## 9.2 DSS Unit - Add or Update DSS Units

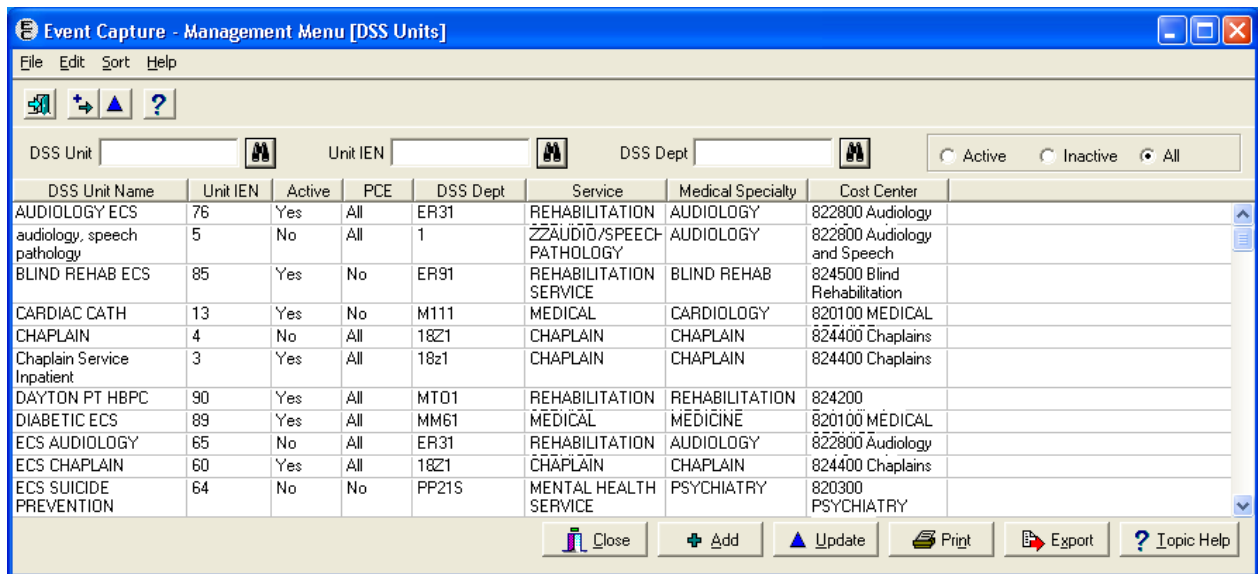
### Before the User Starts

- Use the *Location - Update Location Information* option to create an Event Capture location before using this option.
- A prompt displays a notification to enter an Associated Stop Code only if the "Send to PCE" flag is set to NO or NULL.
- No further options are functional until DSS Units are created.

### What the User Will See

- After selecting DSS Unit from the *Management Menu*, the first screen will display a list of DSS Units. Click the **Update**  **Update** button to update an existing DSS Unit or click the **Add**  **Add** button to add a new DSS Unit.

### Example: DSS Units Screen on Management Menu




DSS Unit Name	Unit IEN	Active	PCE	DSS Dept	Service	Medical Specialty	Cost Center
AUDIOLOGY ECS	76	Yes	All	ER31	REHABILITATION	AUDIOLOGY	822800 Audiology
audiology, speech pathology	5	No	All	1	ZZAUDIO/SPEECH PATHOLOGY	AUDIOLOGY	822800 Audiology and Speech
BLIND REHAB ECS	85	Yes	No	ER91	REHABILITATION SERVICE	BLIND REHAB	824500 Blind Rehabilitation
CARDIAC CATH	13	Yes	No	M111	MEDICAL	CARDIOLOGY	820100 MEDICAL
CHAPLAIN	4	No	All	18Z1	CHAPLAIN	CHAPLAIN	824400 Chaplains
Chaplain Service Inpatient	3	Yes	All	18z1	CHAPLAIN	CHAPLAIN	824400 Chaplains
DAYTON PT HBPC	90	Yes	All	MT01	REHABILITATION	REHABILITATION	824200
DIABETIC ECS	89	Yes	All	MM61	MEDICAL	MEDICINE	820100 MEDICAL
ECS AUDIOLOGY	65	No	All	ER31	REHABILITATION	AUDIOLOGY	822800 Audiology
ECS CHAPLAIN	60	Yes	All	18Z1	CHAPLAIN	CHAPLAIN	824400 Chaplains
ECS SUICIDE PREVENTION	64	No	No	PP215	MENTAL HEALTH SERVICE	PSYCHIATRY	820300 PSYCHIATRY


Select Active, Inactive or All DSS Units.


The DSS Units screen contains the following columns:

- Unit IEN
- Active Status for DSS Unit (Yes or No)
- The PCE column reflects if workload is set to pass to PCE. Values include:
  - ALL – Send all records
  - Outpatient – Send outpatient only
  - No – Send no records.
- DSS Department
- Service

- Medical Specialty
- Cost Center

Using the **Find**  button, the user can search by DSS Unit, DSS Dept. and Unit IEN. Type in a partial search string, press find and the screen will position to the first entry matching your search criteria.

The **Print**  button allows users to print the report.

The **Export**  button allows users to export the data to an Excel spreadsheet.

**Example: Report Exported into Excel**

DSS Unit Name	Unit IEN	Active	PCE	DSS Dept	Service	Medical Specialty	Cost Center
AUDIOLOGY ECS	76	Yes	All	ER31	REHABILITATION SERVICE	AUDIOLOGY	822800 Audiology and Speech Pathology
audiology, speech pathology	5	No	All		1 ZZAUDIO/SPEECH PATHOLOGY	AUDIOLOGY	822800 Audiology and Speech Pathology
BLIND REHAB ECS	85	Yes	No	ER91	REHABILITATION SERVICE	BLIND REHAB	824500 Blind Rehabilitation
CARDIAC CATH	13	Yes	No	M111	MEDICAL	CARDIOLOGY	820100 MEDICAL SERVICE
CHAPLAIN	4	No	All	18Z1	CHAPLAIN	CHAPLAIN	824400 Chaplains
Chaplain Service inpatient	3	Yes	All	18z1	CHAPLAIN	CHAPLAIN	824400 Chaplains

Click **Update**  to update an existing DSS Unit or click **Add**  to add new one. The “Edit a DSS Unit” or “Add a DSS Unit” screen will appear.

**Example: Edit a DSS Unit Screen**

**Event Capture - Edit DSS Unit [AUDIOLOGY ECS]**

DSS Unit Name:  DSS Dept:  IEN:

Service:  Medical Specialty:

Cost Center:

DSS Unit Status:  Active  Inactive

Procedure	Location	Active?	Category
00124 ANESTH EAR EXAM	SPRINGFIEL CBOC		1 Audiolog Exam
SP363 V5010 HEARING AID	SPRINGFIEL CBOC		1 Audiolog Exam
SP004	SPRINGFIEL ACOUSTIC		1 Audiolog


Buttons:


Below are the element name and description for each field that appear on the Add or Edit DSS Unit screen:

Element Name	Description
DSS Unit Name	The name of the DSS Unit being created
DSS Dept and IEN	The number to identify this DSS unit locally at the user's site (1 to 14 characters) - The same DSS Unit number can be used for more than one DSS Unit
Service	The service associated with this DSS Unit - from the SERVICE/SECTION file (#49)
Medical Specialty	The medical specialty associated with this DSS Unit - from the MEDICAL SPECIALTY file (#723)
Cost Center	The cost center associated with this DSS Unit - from the COST CENTER file (#420.1). Cost centers are defined in MP4-Part V, Appendix B of the Fiscal Service cost manuals.
Default Date/Time	NOW – The current date and time will populate during data entry NONE – The date and time will not be filled in during data entry. The user will be required to enter it.
Allow Category Use (Y/N)	YES – Use categories to group procedures during data entry NO – Do not use categories to group procedures during data entry
DSS Unit Status	Active - Lists Active Event Code Screens Inactive - Lists Inactive Event Code Screens
Event Code Screens	Reactivate Remain Inactive
Send to PCE	Defines the method used to send the user's data to PCE for the DSS Unit the user is creating. All Records            Send All Records Outpatient Only      Send Outpatient Only No Records            Send No Records
Associated Stop Code	Select the DSS ID (Clinic Stop Code) associated with this DSS Unit. Be sure to select an active DSS ID.

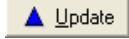
**Note:** on add or edit screens, the status defaults to “Active.” The Allow Category Use field defaults to “No”, but the user can select “Yes”. The Send to PCE option can be setup for “No Records” and the Associated Stop Code field enables. A search for the Associated Stop Code can occur by description or code and both description and code display. The Send to PCE option can be set to “All Record” or “Outpatient Only” and the Associated Stop Code field will be disabled. All other default options have the capability to be changed.

### Instructions to Add a DSS Unit:

1. Click on the **Add**  button.
2. Enter a DSS Unit Name.
3. Enter a DSS Unit Number.
4. Select a Service from the list provided.
5. Select a Medical Specialty from the list provided.

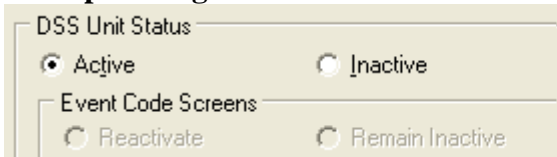
6. Select a Cost Center from the list provided.
7. Choose the Date/Time Default.
8. Choose whether or not to Allow Category Use.
9. Choose which records will be Sent to PCE.
10. Click **OK**  when selections are complete.

**Instructions to Update a DSS Unit:**

1. Select a DSS Unit from the list of DSS Units and click on the **Update**  button.
2. A second screen will appear. On this screen the DSS Unit Name, DSS Unit Number, Service, Medical Specialty, Default Date and Time, Allow Category Use, DSS Status, Event Code Screens status and Send to PCE options can be updated.

**Note:** DSS Status may be Active or Inactive. Note that the Event Code Screen Options are different when Inactive is chosen for DSS Status.

**Example: Original Active Status**



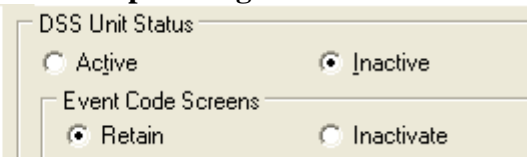
DSS Unit Status

Active       Inactive

Event Code Screens

Reactivate       Remain Inactive

**Example: Original Inactive Status**



DSS Unit Status

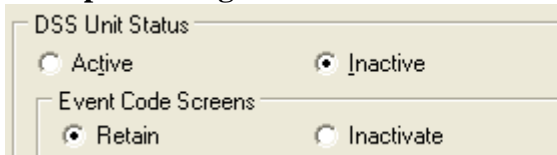
Active       Inactive

Event Code Screens

Retain       Inactivate

When the DSS Status is changed, the Event Code Screens options also change.

**Example: Change from Active to Inactive**



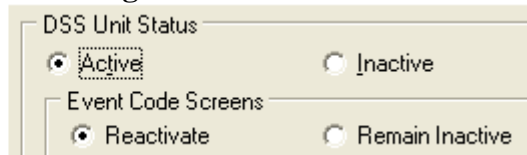
DSS Unit Status

Active       Inactive

Event Code Screens

Retain       Inactivate

**Change from Inactive to Active**




DSS Unit Status

Active       Inactive

Event Code Screens

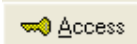
Reactivate       Remain Inactive

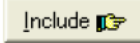
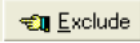
If the user selects **Retain**, the DSS Unit will remain active. If the user selects **Inactivate**, the DSS Unit that was active will be inactivated. Once a DSS Unit is inactive, the user can activate the DSS Unit again by selecting **Reactivate**. If the user selects **Remain Inactive**, the DSS Unit will remain inactive.

3. Click **OK**  when selections are complete.

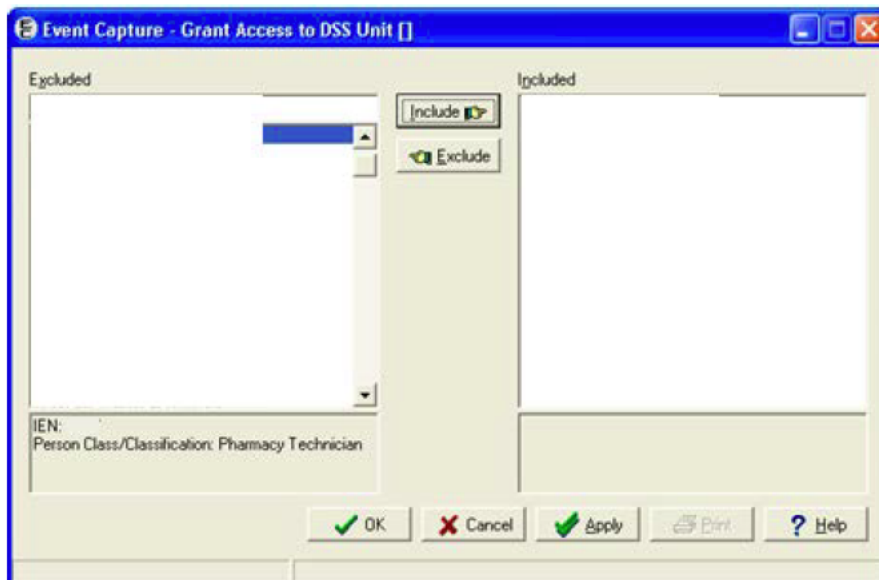
**Granting Access to DSS Unit**

From the Add or Update DSS Units screens, the user has the option to give specific users access to the DSS Units selected.

1. Click on the **Access**  button at the bottom of the Add or Update DSS Units screens.

- The Grant Access to DSS Unit Screen has **Include**  and **Exclude**  fields.
- There is a search field that allows the user to key in beginning characters of the last name above **Include**. Scroll through the list to search for a last name. The **Exclude** field contains the set up for all active users in VistA at the site.
- To give or take away access to a specific DSS unit, the management user must move the user's names from the **Included** and **Excluded** boxes by highlighting the name and pressing the **Include** or **Exclude** button. The name will move into the desired box.  
**Note:** The IEN and Person Class/Classification for each user appear below both Excluded and Included lists.

### Example: Grant Access to DSS Unit Screen



**Note:** Information has been deleted intentionally to preserve privacy



## 9.3 Access by User - Grant Access to DSS Units by User

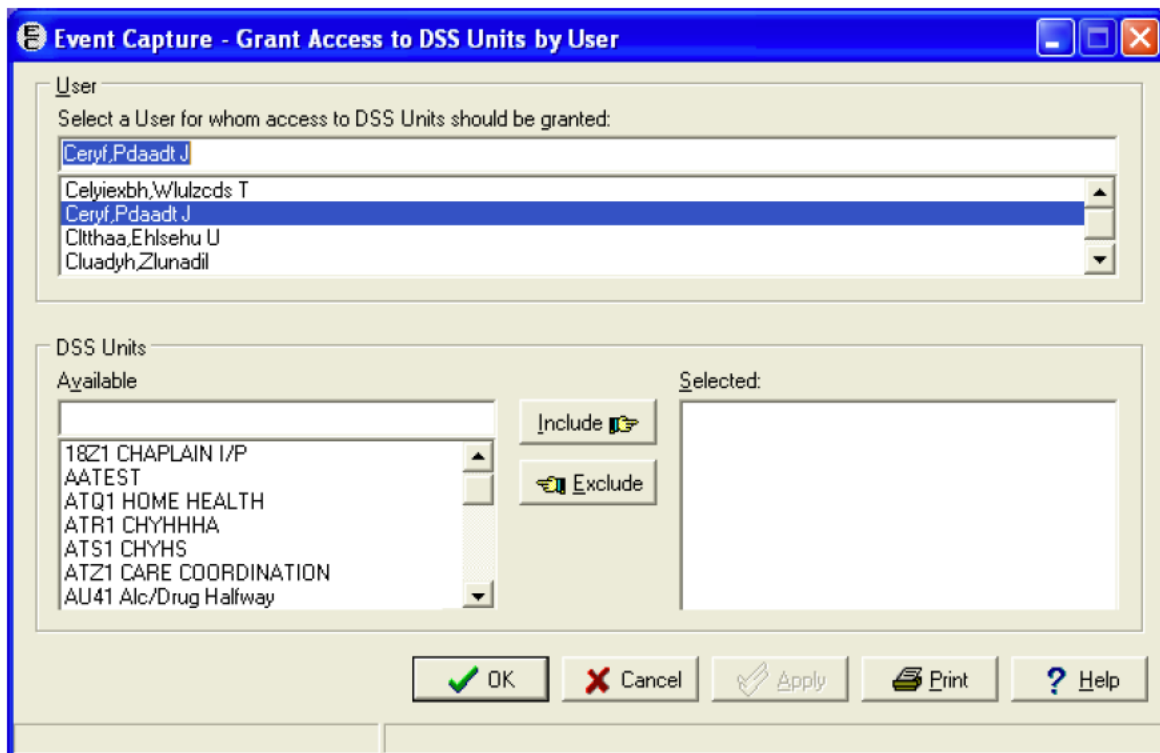
### Before the User Starts


- **Note:** Use extreme caution when utilizing this option. Removing access to a specified DSS Unit for all users and inactivating the DSS Unit is not recommended without the permission of the associated service.
- Contact each service for a list of its Event Capture users and the DSS Units for which they enter data.
- The user must have access to DSS Units before you can begin entering procedure data.
- Access can be provided to all DSS Units by assigning the ECALLU security key to a specified user (normally the DSS Manager or designee) using the *Allocation of Security Keys* option in the *Key Management Menu* under the *Menu Management Menu*.  
**Note:** This option cannot be used to remove access to DSS Units for users who hold the ECALLU security key.

### Instructions to Assign User Access to DSS Units

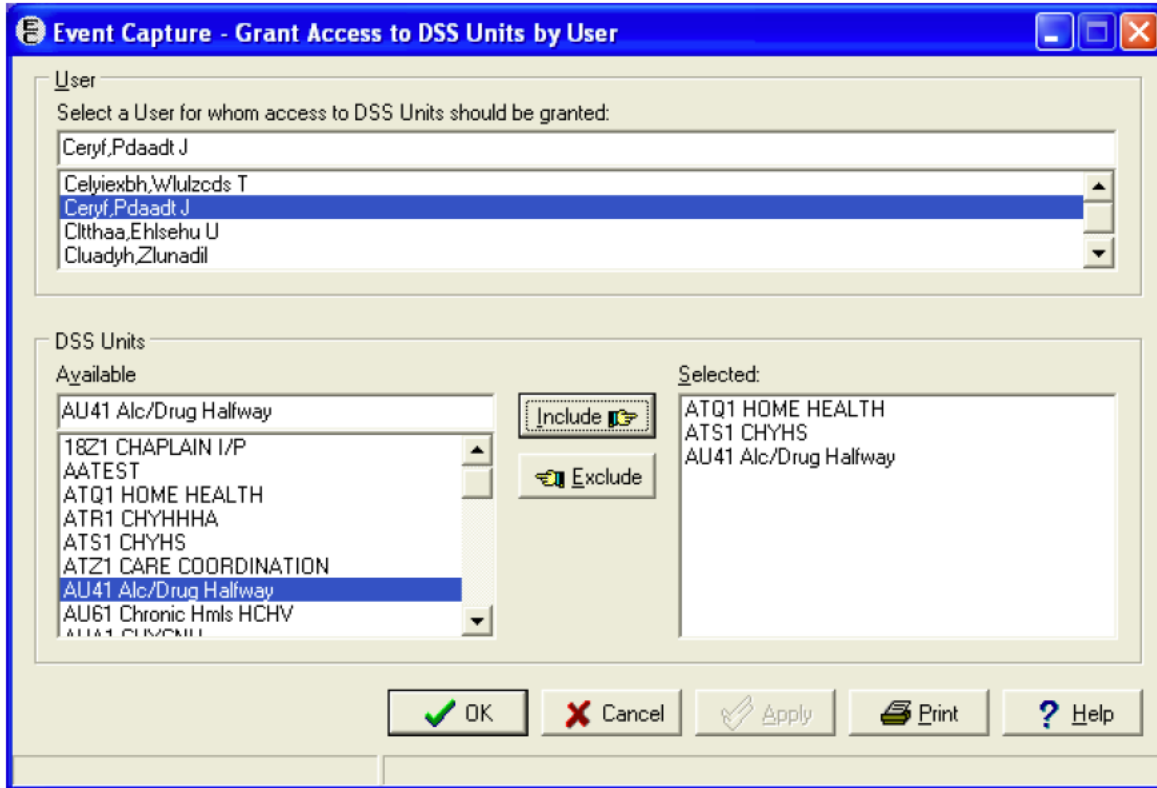
1. Click on the *Access by User - Grant Access to DSS Units by User* button.
2. When the screen opens, a list of users appears at the top of the box. Select a user.




### Example: Grant Access to DSS Units by User



3. Select the names of the DSS Unit(s) by highlighting the particular unit and clicking on the **Include**  button.

**Example: Including DSS Units**



4. Click the **Apply**  button to apply the changes and continue working or click **OK**  button to apply the changes the exit the screen.
5. The user can print a list of users identified as having access to a given DSS Unit by selecting the **Print**  button.

## 9.4 Category - Add or Update Categories

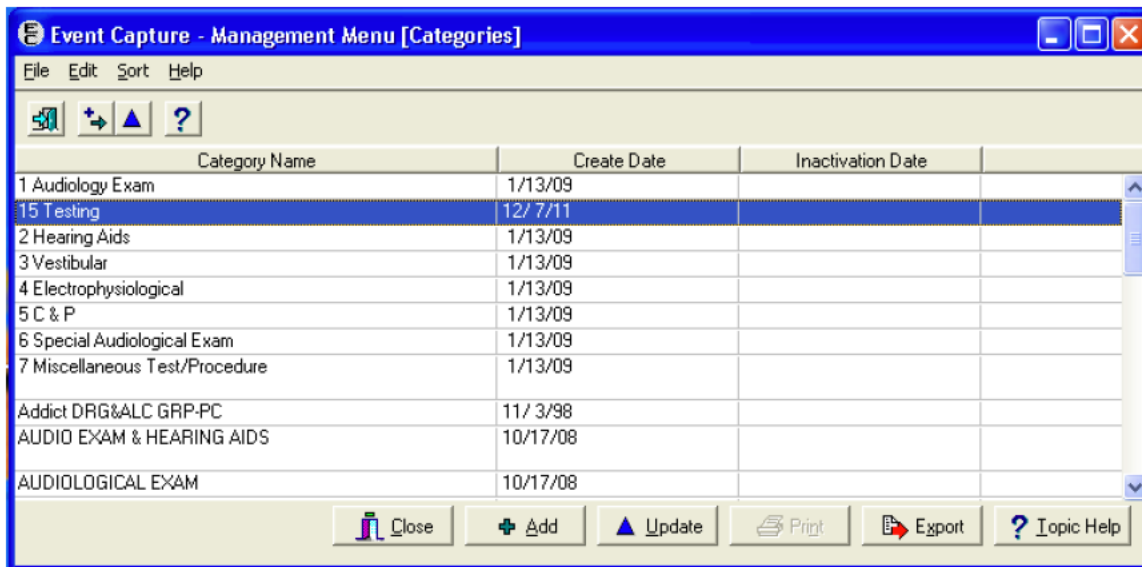
### Before the User Starts

- The user can ignore this option if the site's DSS Units are defined for use without categories.
- Categories cannot be deleted but this option can be used to inactivate or reactivate them.

### What the User Will See

- After selecting *Category – Add or Update Categories* from the Management Menu, the first window displays a list of Category Names, the Date created, and the Inactivation Date.


### Example: Categories Main Screen on Management Menu



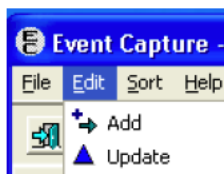
- The second screen allows the user to add a Category or to update a selected Category. The second screen contains fields called Category Name and Status.

### Instructions to Add or Update Categories

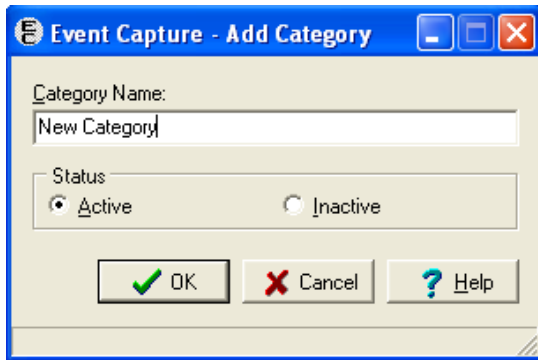
1. To add a new local category:

- Click **Add**  on the toolbar or in the *Edit* menu. The Status field defaults to “Active”.

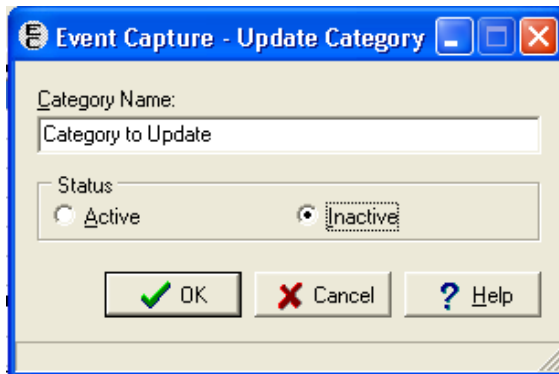
### Example: Edit Menu




- Enter the new local category name.

**Example: Add Category**

- Click **OK**.
2. To update an existing local category:
    - Click on the Category to activate status field.  
**Note:** The Status field displays the current status is for the Category.
    - Change the category to its new status by clicking Active or Inactive. The results of this action will appear on the first screen.

**Example: Update Category**

- Click **OK**.
3. The *Categories* screen on the Management Menu will reflect the changes made.
  4. The **Export**  **Export** button allows users to export the data to an Excel spreadsheet.

**Example: ECS Category Table Exported from Excel**

A	B	C
Category Name	Create Date	Inactivation Date
1 Audiology Exam	1/13/09	
15 Testing		12/7/2011
2 Hearing Aids	1/13/09	
3 Vestibular	1/13/09	
4 Electrophysiological	1/13/09	
5 C & P	1/13/09	
6 Special Audiological Exam	1/13/09	

## 9.5 Procedure - Add or Update Local Procedures

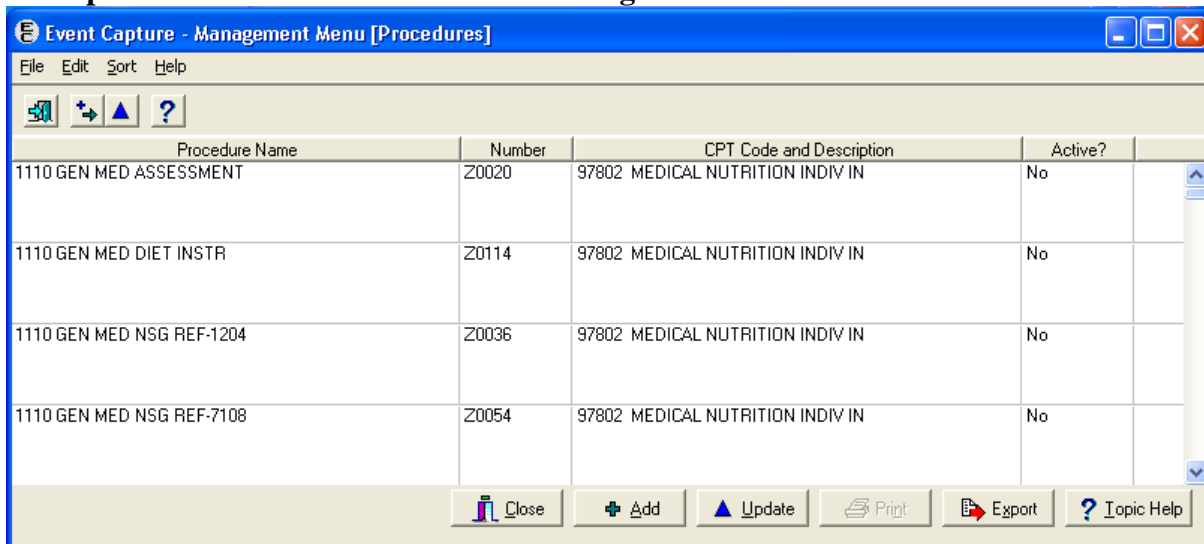
### Before the User Starts

- *Before using this option*, you might want to use the *National/Local Procedure Report* option on the *Reports* menu of the *Event Capture Main Menu* to print a list of procedures with their associated CPT codes. This report can be lengthy if it includes national procedures. This should be queued to print to a device during non-peak hours.
- You must enter an associated CPT code to pass local procedures to the PCE software.
- A local procedure code number is required for any new local procedure.
- The local number code must be five characters in length, starting with an uppercase alpha character, followed by four alpha or numeric characters.
- With functionality put in place by the Code Set Versioning project, only active CPT codes are made available, and are based on the date a local procedure is added.

### What the User Will See

- After selecting *Procedure - Add or Update Local Procedures* from the Management Menu, the first screen displays a list of Local Procedure Names, Procedure Number, CPT Code, and CPT Description and Active Status.

### Example: Procedures Main Screen on Management Menu



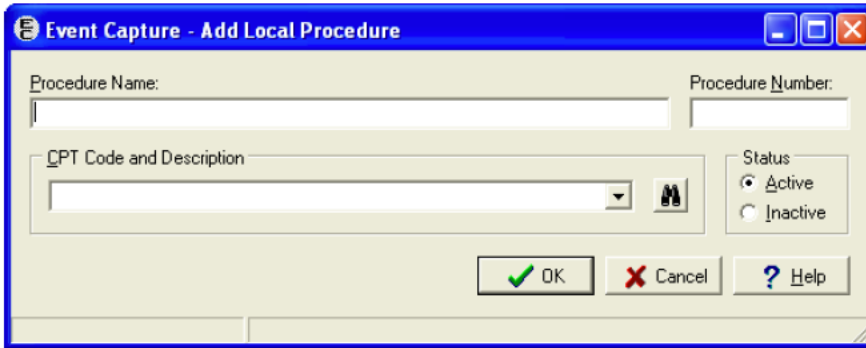
The screenshot shows a software window titled "Event Capture - Management Menu [Procedures]". The window contains a table with the following data:

Procedure Name	Number	CPT Code and Description	Active?
1110 GEN MED ASSESSMENT	Z0020	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED DIET INSTR	Z0114	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED NSG REF-1204	Z0036	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED NSG REF-7108	Z0054	97802 MEDICAL NUTRITION INDIV IN	No

At the bottom of the window, there is a toolbar with buttons for "Close", "Add", "Update", "Print", "Export", and "Topic Help".

- The second screen allows the user to add a Local Procedure or update a selected Local Procedure. The second screen contains the following fields: Procedure Name, Procedure Number, CPT Code and Description and Status.

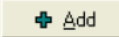
**Example: Add Local Procedure**



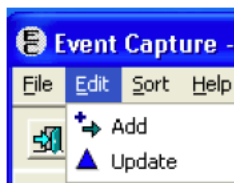
- Procedures *cannot be deleted* but this option can be used to *inactivate* or *reactivate* them.
- The CPT Code and Description field contains CPT Code look-up functionality. This makes a CPT Code searchable by the code, a part of the code, or a part of the description.
- The option to print a list of the user’s current local procedures can be chosen.
- When adding a Local Procedure Code, the system checks it against the National Procedure code format to prevent a Local Code that is already assigned as a National Code from being added. A message is displayed and the Local Code is prevented from being added.

**Instructions to Add or Update Local Procedures**

1. To add a new local procedure:

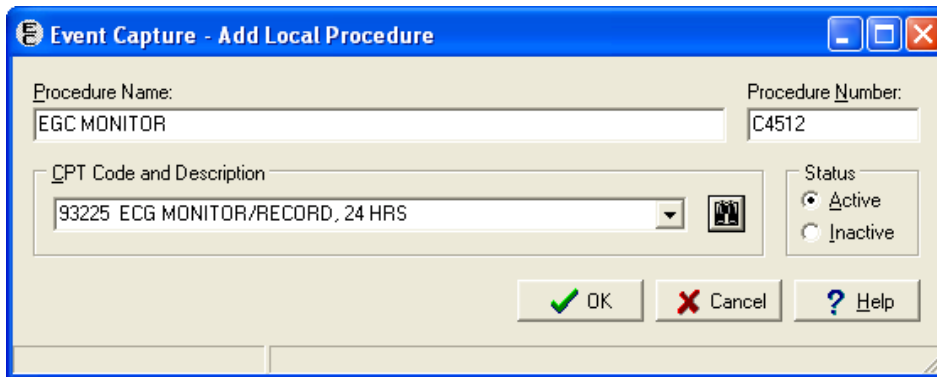
- Click on the **Add**  button in the *Edit* menu or on the toolbar.

**Example: Edit Menu**

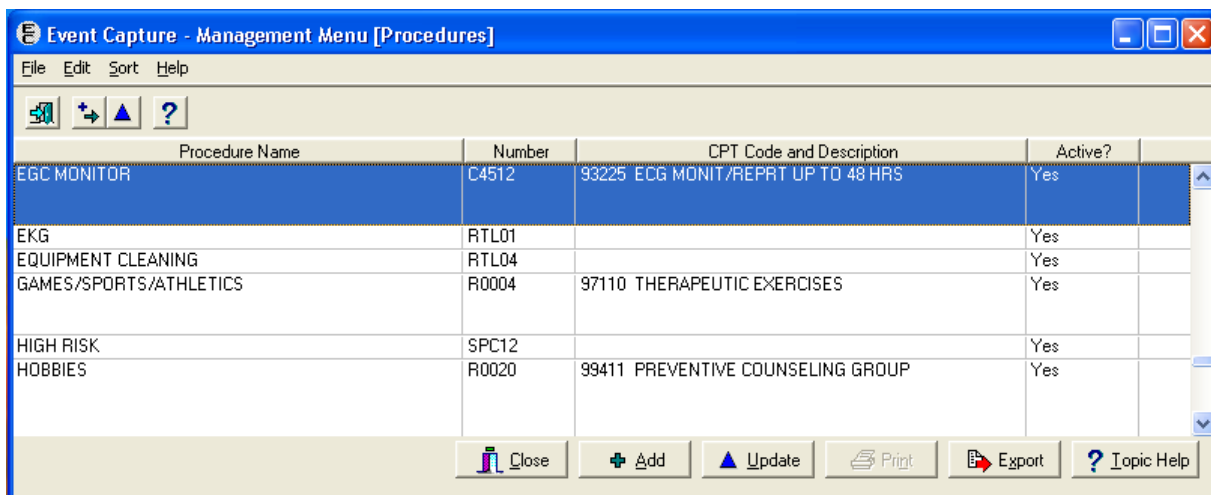


- Enter the new local Procedure Name.
- Enter the local Procedure Number.
- Enter the CPT Code if the data will transmit to the PCE software.
- Click **OK**. The new local procedure has been added.

### Example: Adding a Local Procedure



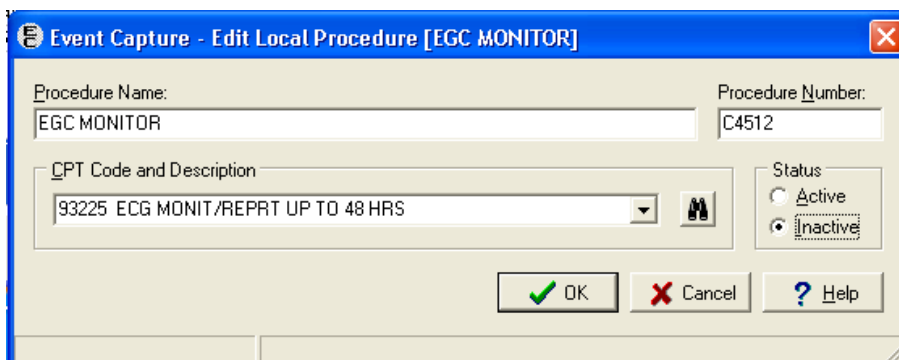
### Example: Update after Adding a Local Procedure



2. To update an existing local procedure:

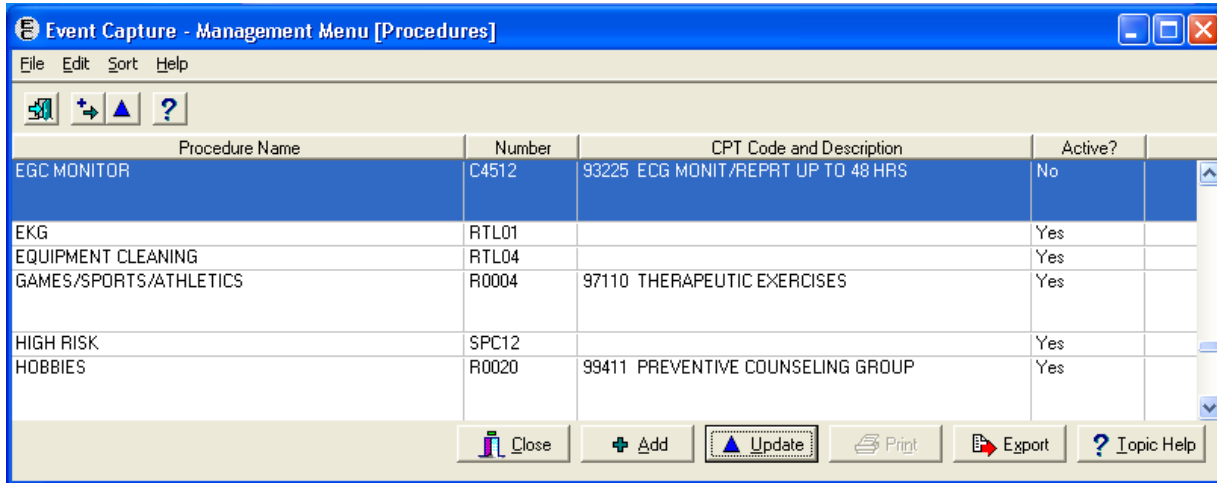
- Highlight the original local Procedure Name and double-click or click the **Update** button.
- Edit the Procedure Name, Procedure Number, CPT and Description and/or Status.
- Click **OK**. The local procedure has been updated.

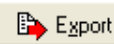
### Example: Editing a Local Procedure





**Example: Update after Editing a Local Procedure**



Select the Export  button to export the Locations listing to Excel and the tab in Excel is titled “ECS Procedure Table Export”.

**Example: Export of Procedures into Excel**

A	B	C	D
Procedure Name	Number	CPT Code and Description	Active?
1110 GEN MED ASSESSMENT	Z0020	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED DIET INSTR	Z0114	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED NSG REF-1204	Z0036	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED NSG REF-7108	Z0054	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED STAT/SCRN	Z0070	97802 MEDICAL NUTRITION INDIV IN	No
1110 GEN MED UNIT TIME	Z0004	97802 MEDICAL NUTRITION INDIV IN	No
1113 REHAB ASSESSMENT	Z0021	97802 MEDICAL NUTRITION INDIV IN	No

The table is shown within an Excel spreadsheet window titled "ECS Procedure Table Export". The spreadsheet has tabs for "Sheet2" and "Sheet1".

## 9.6 Reason – Add or Update Procedure Reasons

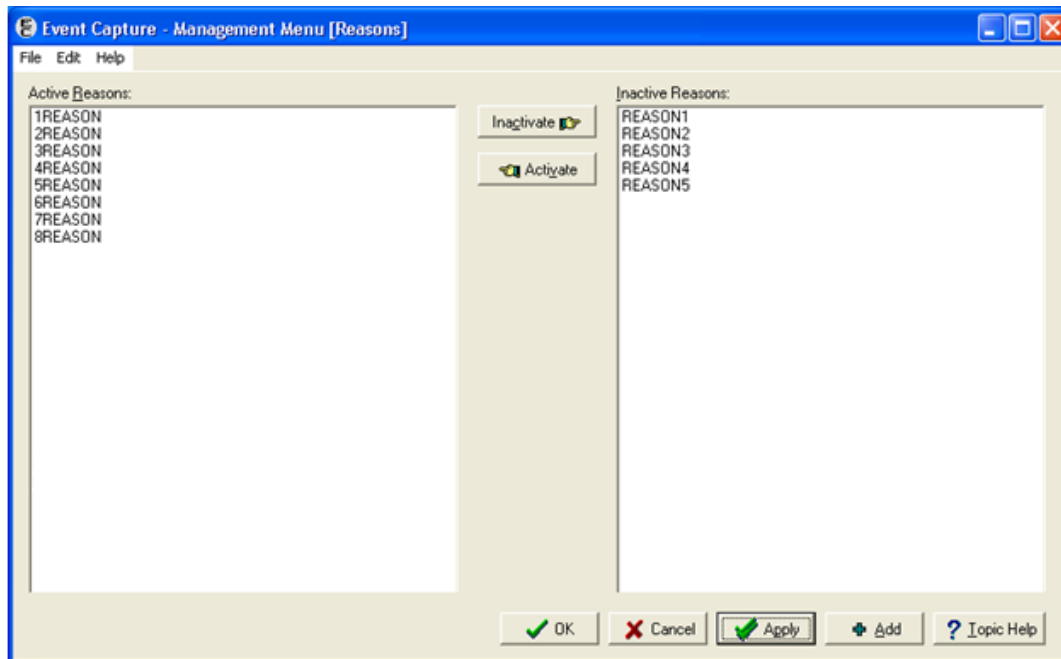
### Before the User Starts

- Users with the ECMGR security key can activate or inactivate existing reasons. If a reason is listed as inactive, it will not appear on the dropdown list for reasons on any screen.
- Users also can add a new reason using the Event Capture – New Reason screen.

### What the User Will See

- After selecting *Reason – Add or Update Procedure Reasons* from the Management Menu, the first screen displays a list of Active Reasons and Inactive Reasons.

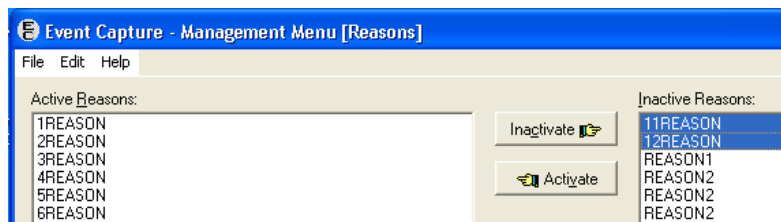
### Example: Management Menu [Reasons] Screen



### To Activate Reasons:

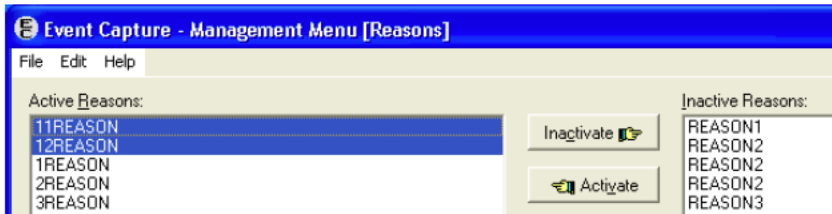
- Highlight the Inactive Reason(s) and click the **Activate**  button. To move more than one reason, press and hold <Ctrl> and then highlight additional reasons.

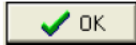
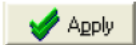

### Example: Reasons Screen with Inactive Reasons Highlighted



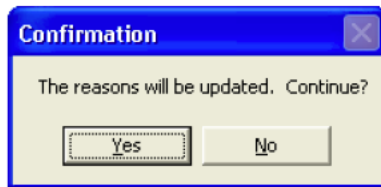
- The Inactive Reason(s) selected will appear in the Active Reasons column.

**Example: Reasons Screen with Inactive Reasons Moved to the Active Column**

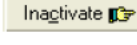


- Click the **OK**  or **Apply**  button to update the Reason(s). A confirmation prompt will appear. Click **Yes**  to update and save the reason changes.

**Example: Confirmation Prompt**



**To Inactivate Reasons:**

- Highlight the Active Reason(s) and click the **Inactivate**  button. To move more than one reason, press and hold <Ctrl> and then highlight additional reasons.




**Example: Reasons Screen with Active Reasons Highlighted**



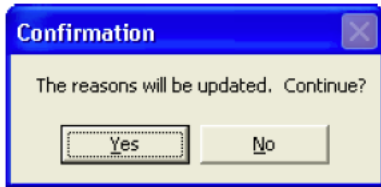
- The Inactive Reason(s) selected will appear in the Active Reasons column.

**Example: Reasons Screen with Active Reasons Moved to the Inactive Column**




- Click the **OK**  or **Apply**  button to update the Reason(s). A confirmation prompt will appear. Click **Yes**  to update and save the reason changes.

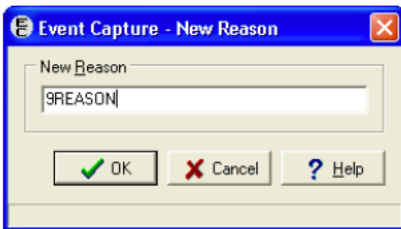
**Example: Confirmation Prompt**

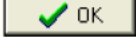
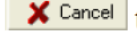


**To Add a new Reason:**

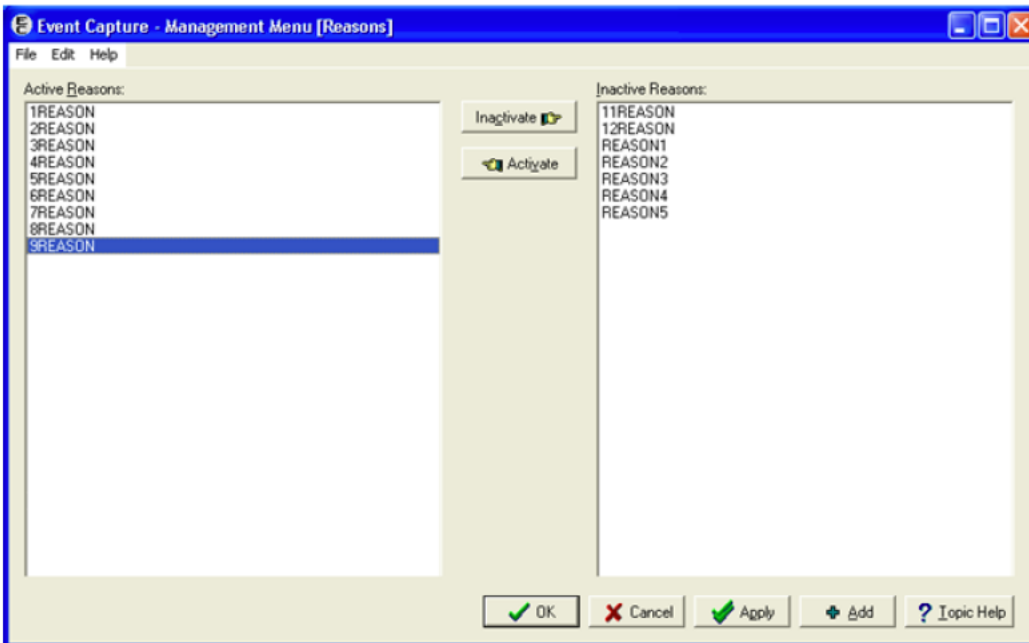
- Click the **Add**  button. The Event Capture – New Reason screen will appear.

**Example: Event Capture – New Reason Screen**



- Type the new reason. Click **OK**  to add the reason to the Active Reasons column. Click **Cancel**  to exit the screen.

**Example: Reasons Screen with New Reason Added**



## 9.7 Event Code Screen – Add, Update or Copy Event Code Screens

### Before the User Starts

- Use the *Location - Update Location Information* option to create an Event Capture location before using this option.
- Use the *DSS Unit - Add or Update DSS Units* option to establish DSS Units before using this option.
- Event Code screens must be defined before entering any Event Capture data.
- A prompt for Category occurs only if the Event Code screen uses categories to group procedures.
- The user must define an active Associated Clinic and CPT code to pass Event Code procedures to PCE.
- With functionality put in place by the Code Set Versioning project, only active CPT codes can be selected and they will be based on the date the event code screen is being set up.
- The Event Code screen allows the use of characters “/” and “-” in the search field.
- The Associated Clinic on the Event Code screen is not auto-populated.
- The Print and Export buttons have been added to the Event Code Screen.
- Users with the ECMGR key will be able to copy EC screens to another DSS Unit

### What the User Will See

- After selecting *Event Code Screen - Add or Update Event Code Screens* from the Management Menu, the first screen displays a dropdown box of DSS Units with their corresponding Categories and Procedures and Locations.
- Select a DSS Unit to display the Event Code Screen data. Columns include Synonym, Procedure, Location, Category and Status.

### Example: Event Code Screens Example

Synonym	Procedure	Location	Default Associated Clinic	Category	Status
	SP071 HEARING SCREENING, AIR ONLY	DAYTON		1 Audiology Exam	Active
	SP072 PURE TONE AUDIOMETRY, AIR ONLY	DAYTON		1 Audiology Exam	Active
	SP073 PURE TONE AUDIOMETRY, AC/BC	DAYTON		1 Audiology Exam	Active
	SP074 SPEECH THRESHOLD TESTING	DAYTON		1 Audiology Exam	Active

- The Event Code Report can be printed. When printing the report, the user will be prompted to choose Active, Inactive or All for the Clinic Status.

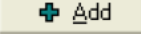
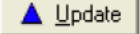
**Example: Select Clinic Status for the Report**



- The Event Code Table Report can also be exported to Excel. The user will be prompted to choose Active, Inactive or All for the Clinic Status. The Excel spreadsheet columns include in this report are Synonym, Procedure, Location, Default Associated Clinic, Category and Status. The spreadsheet tab is “Event Code Table Export”.

**Example: Exported Event Code Table Report**

A	B	C	D	E	F
DSS UNIT: CARDIAC CATH					
SYNONYM	PROCEDURE	LOCATION	DEFAULT ASSOCIATED CLINIC	CATEGORY	STATUS
CHEST PAIN	A4646 CONTRAST 300-399 MGS IODINE	DAYTON		None	Active
A4643 High dose contrast MRI	A4643 HIGH DOSE CONTRAST MRI	DAYTON		None	Active
	C1725 CATH, TRANSLUMIN NON-LASER	DAYTON		None	Active
	C1760 CLOSURE DEV, VASC	DAYTON		None	Active
	C1874 STENT, COATED/COV W/DEL SYS	DAYTON		None	Active

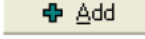
- Highlight the Procedure and select **Add**  or **Update**  buttons. The Update Event Code Screen contains fields called DSS Unit, Category, Location, Procedure, Status, Procedure Synonym, Default Volume, Default Associated Clinic, and Ask Reasons.

### Example: Add Event Code Screen Example

- Find and select an Associated Clinic. The look-up displays only active locations in the HOSPITAL LOCATION file (#44) whose type is “C” (clinic) and is a “count” clinic. In addition, if an Associated Clinic has non-conforming stop codes, the clinic will not be selectable.

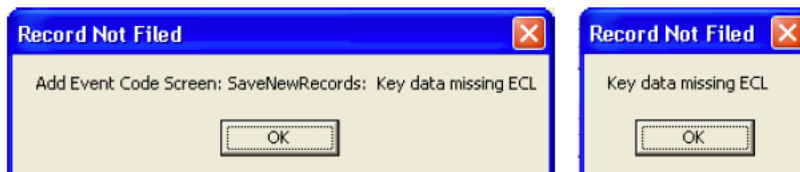
The following instructions and example assume that the user wants the specified DSS Unit to Send Data to PCE.


#### Instructions to add an Event Code Screen

1. After selecting a DSS Unit from the dropdown box, click the **Add**  button in the toolbar or in the *Edit* menu.
2. At the appropriate dropdown boxes select the DSS unit, Category (if applicable, otherwise grayed out), Location (one/many/all), Procedure, Procedure Synonym, Status, Default Volume, Default Associated Clinic, and Ask Reasons.
3. Click **OK**.

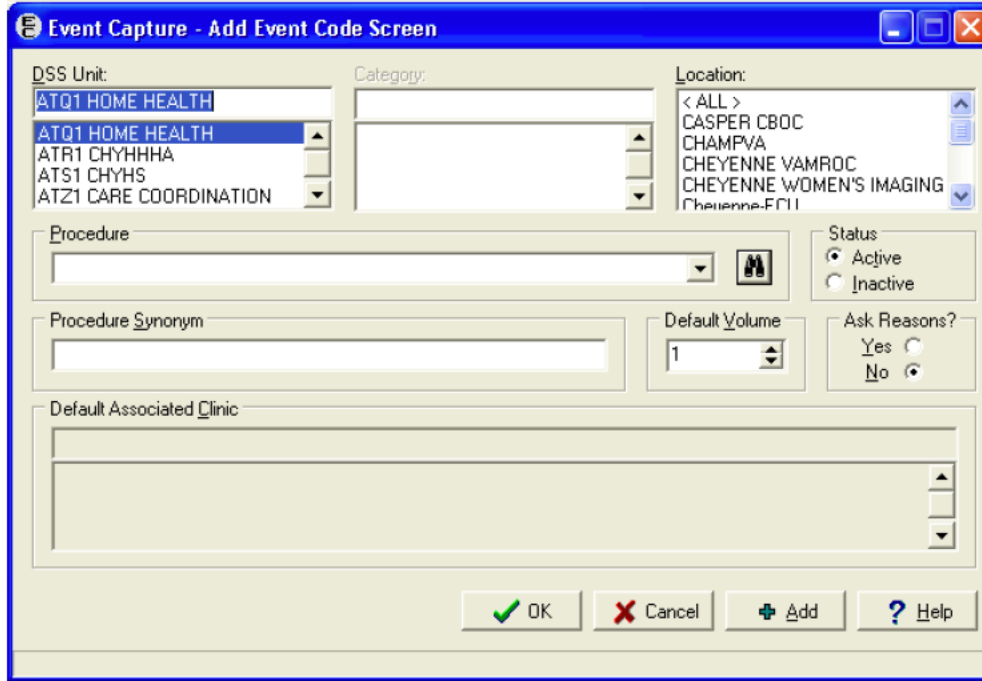
**Note:** If the user does not select a Location when adding an Event Code Screen, the record will not be filed and the following two error messages will appear:

#### Example: Record Not Filed Error Message for Key Data Missing

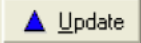


Click the **OK**  button on each popup screen to return to the Add Event Code Screen and enter a Location.

### Example: Adding an Event Code Screen



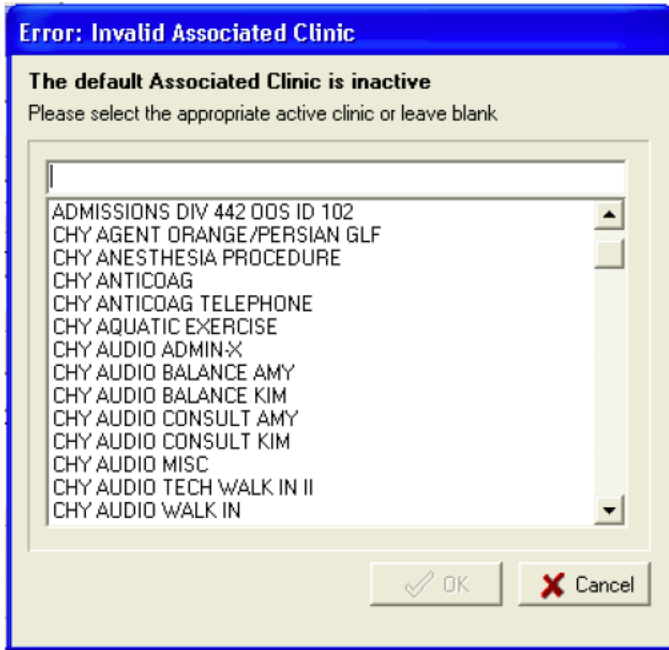
### To Update an Event Code Screen

1. Click on an Event Code Screen from the list of event code screens for a particular DSS Unit.
2. Click the **Update**  button in the toolbar or in the *Edit* menu.

**Note:** An error message appears if a user selects an Event Code Screen that has an inactive Associated Clinic. The user has the option to select an appropriate active clinic or to leave the Associated Clinic blank.

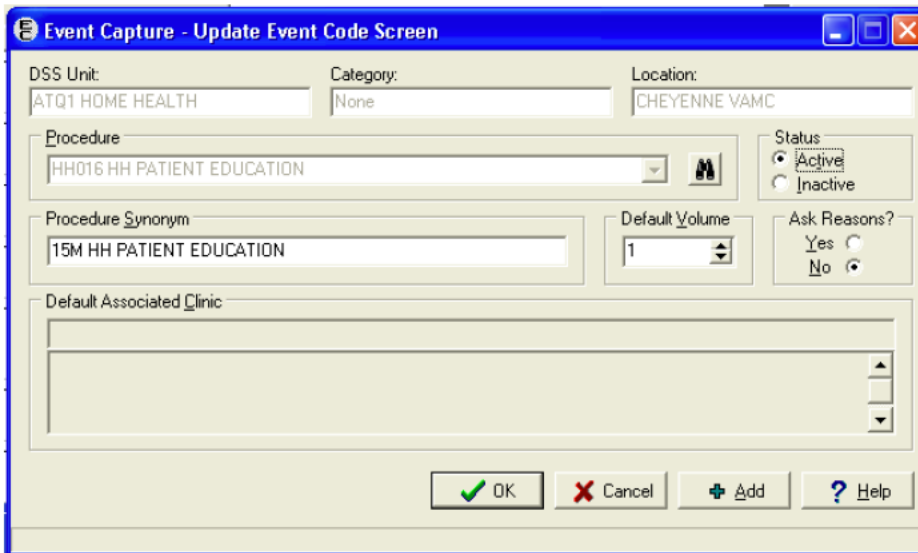


**Example: Invalid Associated Clinic Error**



3. Update the Status, Procedure Synonym, Default Volume, Default Associated Clinic, and Ask Reasons.
4. Click OK.

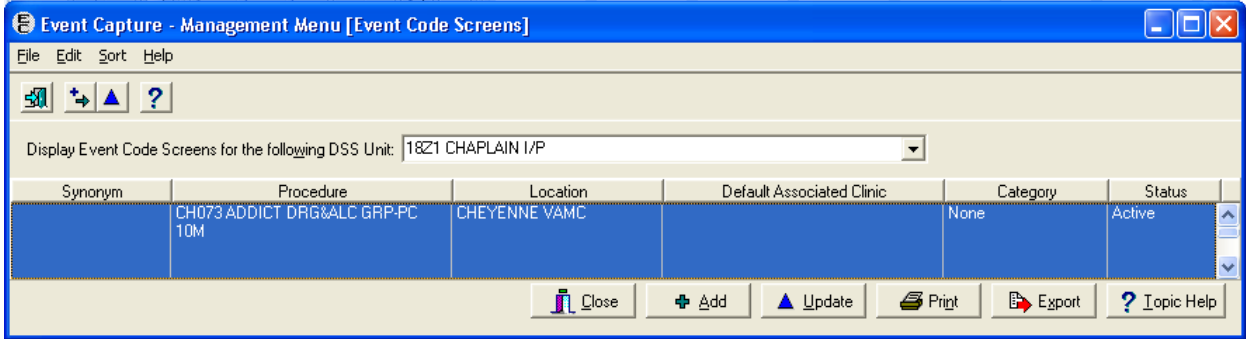
**Example: Update an Event Code Screen**



## Instructions to Copy EC Screens to Another DSS Unit

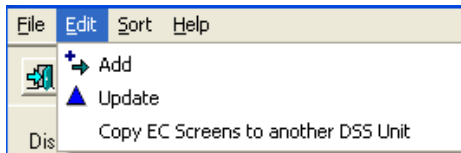
1. Highlight a DSS Unit that has an ‘Active’ status.

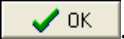
### Example: Event Code Screen with Active DSS Unit Selected



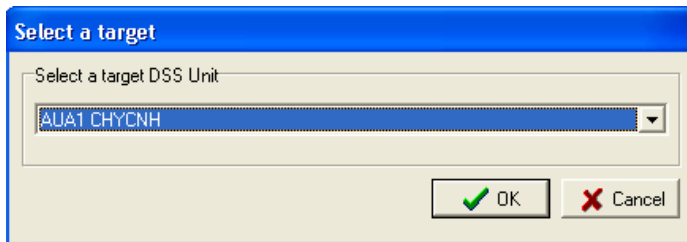
2. Click on the *Edit* menu and select Copy EC Screens to Another DSS Unit.

### Example: Copy EC Screens to Another DSS Unit on Edit Menu



3. The Select a target screen appears. Select a target DSS Unit (usually newly created) from the dropdown list and then click **OK** .

### Example: Select a Target Screen



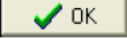


4. The Copy Event Capture Screen to <user selected target DSS Unit> displays.
  - Location, Status, Procedure Synonym, Default Volume, Ask Reason and Default Associated Clinic can be modified on this screen.
  - The DSS Unit, Category, and Procedure cannot be edited.

**NOTE:** The target DSS Unit is usually newly created by the user, but an existing DSS Unit may also be used.

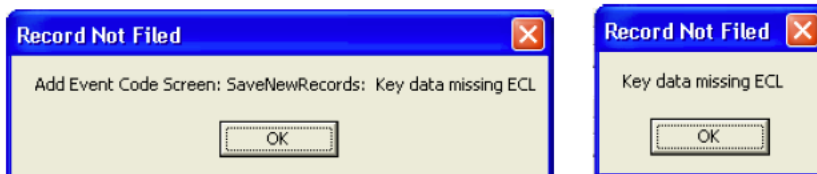
**Example: Copy Event Code Screen**


- Location, Status, Procedure Synonym, Default Volume, Ask Reason and Default Associated Clinic can be modified on this screen.  
**Note:** If the DSS Unit is setup to not send records to PCE, the Default Associated Clinic is disabled.

## 5. One, many or all screens can be copied.

- To copy a screen, review the field selections and make edits (if necessary). Select the **OK**  button to save the changes and to create the copy. The next screen will appear.
- To skip an EC screen, select the **Skip this EC Screen**  button. The next screen will appear.
- If all needed screens are copied, select the **Close**  button to return to the Event Code Screen. All of the previous changes will be saved.

**Note:** If the user does not select a Location when copying an Event Code Screen, the record will not be filed and the following two error messages will appear:

**Example: Record Not Filed Error Message for Key Data Missing**

Click the **OK**  button on each popup screen to return to the Copy Event Code Screen and enter a Location.

## 9.8 Inactivate EC Screen – Identify/Inactivate Multiple Event Code Screens

### Before the User Starts

- Users with the ECMGR security key can select an EC Product Code (CPT Code, National EC Procedure Code or Local EC Procedure Code) and then display all of the DSS Units using the selected Product Code in the *Inactivate Selected Event Code (EC) Screens for Given Procedure Code*.
- Choose to inactivate Event Code Screens by utilizing the checkboxes in front of each entry. The user can display and print a list of Event Code Screens inactivated for a chosen EC Product Code.

### What the User Will See

- After selecting the Inactivate EC Screen from the Management Menu, the first screen (Event Capture – Inactivate Selected Event Code (EC) Screens for Given Procedure Code) will appear.
- Enter an Event Capture Product Code (CPT Code, National EC Procedure Code, or Local EC Procedure Code). The associated DSS Units with IENs, Locations and Categories appear for the EC Product Code selected.
- Checkboxes are available to the left of each entry. The user can select multiple checkboxes.

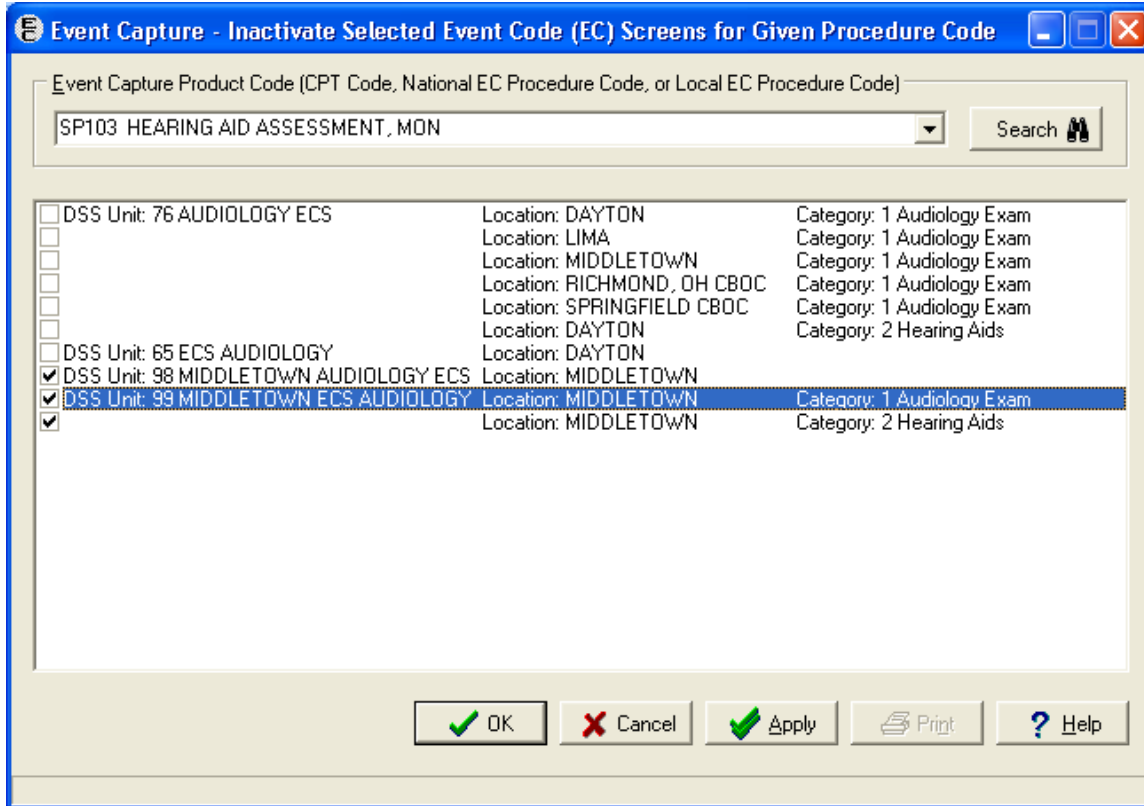
### Example: Inactivate Selected Event Code (EC) Screens for Given Procedure Code


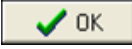
DSS Unit	Location	Category
<input type="checkbox"/> DSS Unit: 76 AUDIOLOGY ECS	Location: DAYTON	Category: 1 Audiology Exam
<input type="checkbox"/>	Location: LIMA	Category: 1 Audiology Exam
<input type="checkbox"/>	Location: MIDDLETOWN	Category: 1 Audiology Exam
<input type="checkbox"/>	Location: RICHMOND, OH CBOC	Category: 1 Audiology Exam
<input type="checkbox"/>	Location: SPRINGFIELD CBOC	Category: 1 Audiology Exam
<input type="checkbox"/>	Location: DAYTON	Category: 2 Hearing Aids
<input type="checkbox"/> DSS Unit: 65 ECS AUDIOLOGY	Location: DAYTON	

**Instructions for Inactivating Event Code Screen(s)**

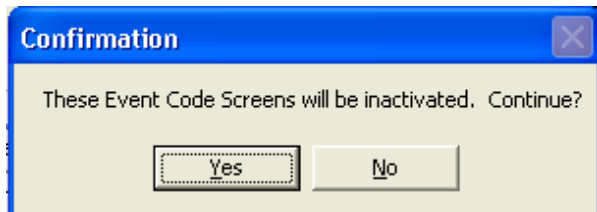
1. Enter an Event Capture Product Code (CPT Code, National EC Procedure Code, or Local EC Procedure Code).
2. The list shows all currently active Event Capture Product Codes. Use the checkboxes on the left side of the screen to select entries to be inactivated.

**Example: Entries Selected to be Inactivated**



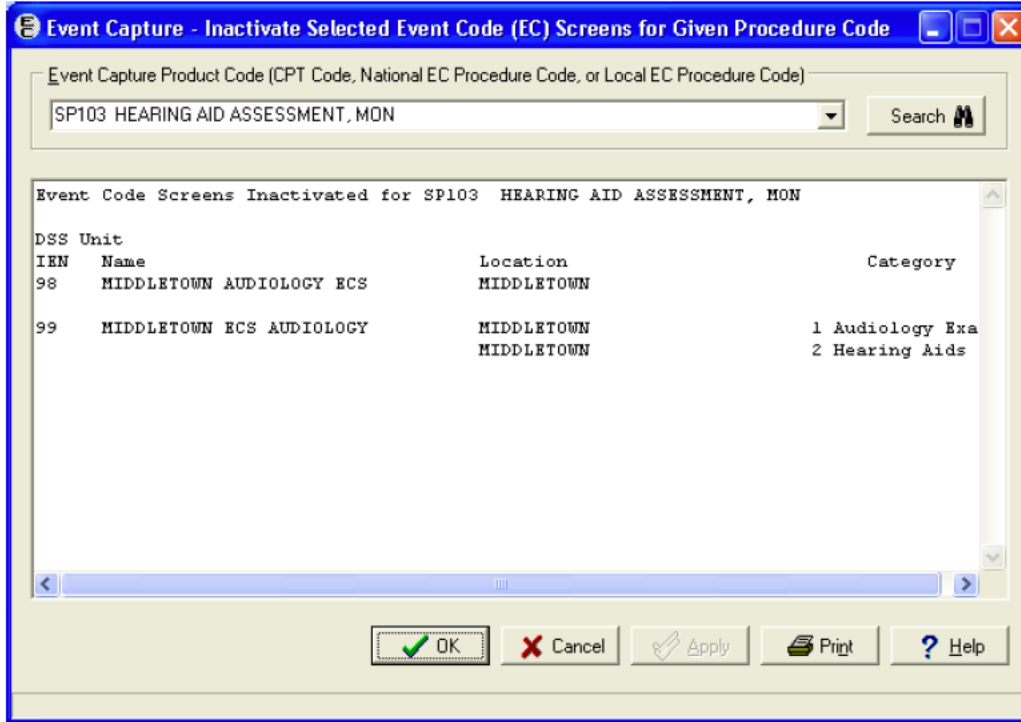
3. Click the **Apply**  or **OK**  buttons to Inactivate.
4. A confirmation pop-up will appear. Click **Yes** to Inactivate selection(s) or click **No** to return to the previous screen.



**Example: Confirmation Pop-up for Inactivate Event Code Screens**



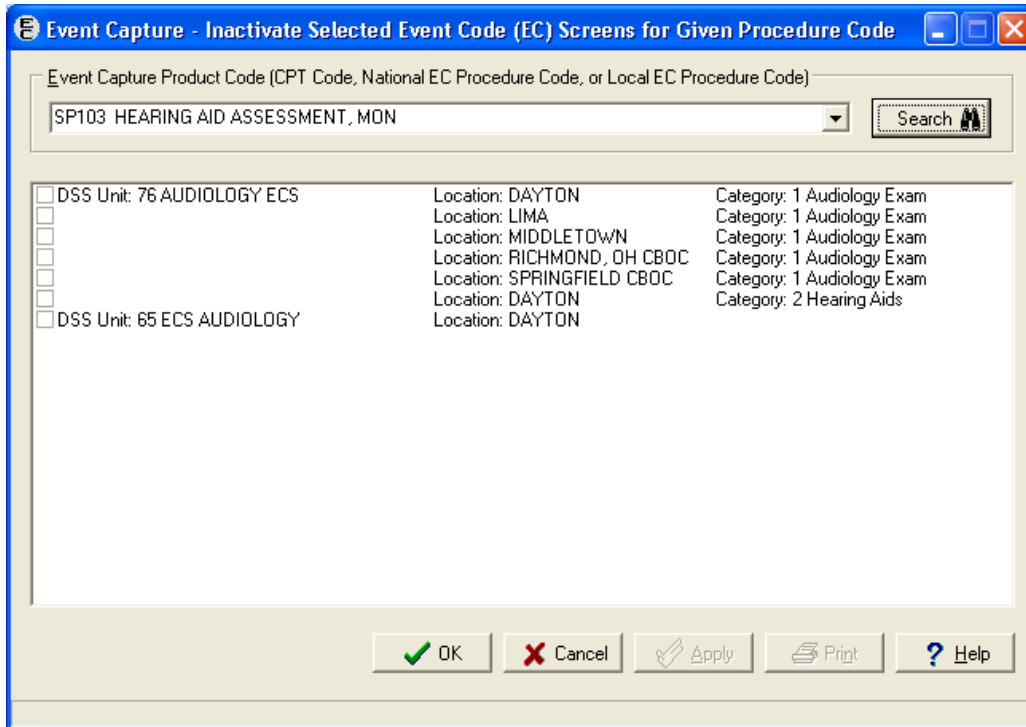
- If **Yes** is selected in response to the confirmation prompt, a listing of the event Code Screens that were inactivated will be displayed.

**Example: Event Code Screens That Were Inactivated**



- There will be an option to **Print**  this list of inactivated screens or click **OK**  to exit back to the first screen.
- To verify that the Event Code Screens are inactivated, reenter the Event Code Product Code that was previously used. The list of DSS Units, Locations and Categories does not include the inactivated Event Code Screens.

### Example: Verifying that Screens Were Set to Inactive



## Appendix A - Glossary

Term	Definition
Associated Stop Code	The DSS Identifier (stop code) that most closely represents the DSS Unit workload.
Category	Category provides Event Capture a common level to group associated procedures. Multiple procedures can be defined for each category.
Cost Center	Cost Center reveals which service is using this DSS Unit. Cost Centers are defined in detail in MP4-Part V, Appendix B of the Fiscal service cost manuals.
Conforming Clinics	Clinics that have stop codes in compliance with their restriction types. Stop codes are used in accordance to their assigned restriction types. Stop codes with restriction type 'P' can only be used in the primary stop code position. Stop codes with restriction type 'S' can only be used in the secondary stop code position. Stop codes with restriction type 'E' can be used in either the primary or secondary stop code position.
Count Clinic	A clinic for which workload entered is credited.
CPRS	Acronym for Computerized Patient Record System
CPT code	Current Procedural Terminology code
CPT Modifier	CPT modifiers provide the ability to refine CPT procedure codes to better reflect procedures performed.
CSV	Code Set Versioning The Health Information Portability and Accountability Act (HIPAA) mandated that applications using CPT codes, CPT modifiers, and diagnosis codes should allow users to select codes based upon a date that an event occurred.
DSS Unit	A DSS Unit (Decision Support System Unit) defines the lowest level segment used for tracking hospital resources. These units can be a small work unit within a service or a large division within a service. Management at each facility is responsible for tailoring the DSS Units to fit its resource/cost reporting.
DSS Unit Number	This code is used for additional identification of DSS Units.
Event Capture	Software designed to provide management tools necessary in tracking procedures not entered in other VistA packages.
Event Code Screen	Event code screens are unique combinations of location, DSS Unit, category, and procedure that define patient procedures.
GUI	Graphical User Interface
ICD-9	International Classification of Diseases (of the World Health Organization) codes
IPC	Inactive Person Class
Location	Initializing the user site as a location, the Event Capture software recognizes the user facility as a valid location to enter Event Capture data.
MAS	Acronym for Medical Administration Service, which is now Patient Information Management System (PIMS).



<b>Term</b>	<b>Definition</b>
Non-conforming Clinics	Clinics with stop codes that do not comply with the assigned stop code restriction types of P=Primary, S=Secondary and E=Either.
Non-count Clinic	A clinic for which there is no workload credited.
Ordering Section	The medical section ordering the patient's procedure.
Parent Service	The controlling service for a DSS Unit.
PCE	Patient Care Encounter
PIMS	Patient Information Management System formerly Medical Administration Service (MAS).
Procedure	A specific function performed on, or service provided to, a patient. Multiple procedures can be associated with a single category.
Procedure Reason	A method of generically grouping patient procedures.
Provider	The provider of care performing the procedure. This provider can be a doctor, nurse, technician, or any designated team of medical professionals.
T&TC	508 Accessibility Testing and Training Center
Volume	Volume is associated with the number of procedures performed. This field can also be used to track time actually spent performing the procedures.
VistA	Veterans Health Information Systems and Technology Architecture

## Appendix B – Synchronizing ECS with VistA Scheduling and PCE at the User’s Site

Operations and Management (10N) has mandated that all clinical appointments including walk-ins be scheduled in VistA Scheduling using count clinics. Surgery, Laboratory, and Radiology Services feed PCE and NPCD directly from their respective VistA packages and must be scheduled with non-count clinics to avoid double-counting. ECS reporting is not used for these services.

Non-clinical appointments such as scheduling transportation resources can continue to use non-count clinics.

DSS site teams and clinical staff using ECS reporting must adhere to the following instructions for clinical appointments to ensure coordination with VistA Scheduling and PCE.

1. Create a count clinic in VistA Scheduling for scheduling purposes.
2. Associate this clinic with the Event Code Screen and DSS Unit using the *Event Code Screen – Add or Update Event Code Screens* option in the Management Menu of the Event Capture software. Event Capture uses the Stop Code of the associated clinic to pass workload data to PCE. By passing data from Event Capture to PCE, the user will also be sending the data to Austin where it is filed in the National Patient Care Database (NPCD). (See Appendix B.)
3. In DSS do not cost the clinic appointment product. Send it to a DSS statistics department.
4. When recording workload in ECS, ensure the ECS Procedure Date/Time matches the date/time of the scheduled appointment. Complete the required encounter information to close out the encounter.

Coordinate and review the above with clinical and administrative staff who use Event Capture as well as with Scheduling and PIMS staff.

## Appendix C - Summary of the PCE Filing Process

Follow these steps to define an associated clinic for each event code screen that has DSS Units marked to send data to PCE. The options mentioned can found in the Event Capture Management Menu.

1. Use the *DSS Unit – Add or Update DSS Units* option to update the SEND TO PCE information for each DSS unit.
2. Use the *Event Code Screen – Add or Update Event Code Screens* option to create new event code screens or to modify existing event code screens.

The DATE/TIME OF PROCEDURE field (#2) of the EVENT CAPTURE PATIENT file (#721) requires the entry of both date and time as part of every procedure date.

Users must provide the following information for each procedure during data entry.

- ICD-9 Diagnosis Code
- If the selected patient has multiple eligibilities, users will be prompted to select the eligibility that applies to the specified procedure. The PRIMARY eligibility is displayed as the default.
- A response to the classification questions for patient procedures is required only if they apply to the patient.
- If a procedure is associated with a CPT code, then users will be prompted to enter CPT modifiers.
- Associated Clinic

After the PCE-related prompts are answered, all appropriate patient records are formatted to file the data with PCE. This formatted data string is stored in the PCE DATA FEED field (#30) of the EVENT CAPTURE PATIENT file (#721). The flag to file this record is then set in the SEND TO PCE field (#31) of the EVENT CAPTURE PATIENT file (#721).

# Appendix D - Other ECS Package Management Information

## How to set up an ECS email group

Set up an ECS mail group in VistA to receive relevant ECS notifications. Contact IT to set up a VistA ECS Mail Group to be able to have more than one person receive ECS administrative messages.

## Examples of ECS package administrative Email messages:

### 1. When a new ECS patch is released.

#### Example A

```
Subj: PATCH EC*2.0*XXX UPDATE TO EC NATIONAL PROCEDURE (#725)
FILE[#XXXXXXXXX]
DD MMM YYYY 07:54:22 -0500 (CDT) 338 lines
From: <PROTECTED EMAIL ADDRESS> In 'PATCHES FOR DSS' basket. Page 1
-----
```

```
-
This patch is now in all TEST accounts and will be installed into
PRODUCTION on TUE DATE by 8am CST. Post install information will be
forwarded to DSS. Thank you for your review of this patch, if you have
any questions call me. NAME PHONE.
```

```
$TXT Created by YYYYYY,XXXX at <PROTECTED EMAIL ADDRESS> (KIDS) on
Wednesday, MM/DD/YY at 12:18
```

```
=====
Run Date: MMM DD, YYYY                      Designation: EC*2*XXX
Package : EC - EVENT CAPTURE                 Priority: Mandatory
Version : 2          SEQ #XXX                Status: Released
Compliance Date: MMM DD, YYYY
=====
```

```
Associated patches: (v)EC*2*YYY <<= must be installed BEFORE `EC*2*XXX`
```

```
Subject: UPDATE TO EC NATIONAL PROCEDURE (#725) FILE
```

```
Category:
- Other
- Routine
```

```
Description:
=====
```

This patch addresses 1 issue:

1. Updates the EC NATIONAL PROCEDURE (#725) file: it adds 23 new procedure records, inactivates 16 existing procedure records, and updates names and codes for 49 others.

```
Associated NSR(s):
----- . . .
```

**Example B**

Subj: EC\*2.0\*XXX INSTALLATION [#XXXXXXXX] DD MMM YYYY 14:53:26 -0500  
 (CDT)  
 10 lines  
 From: <PROTECTED EMAIL ADDRESS>  
 In 'PATCHES FOR DSS' basket. Page 1

-----  
 -  
 PACKAGE INSTALL  
 SITE: <EMAIL ADDRESS PROTECTED>  
 PACKAGE: EVENT CAPTURE  
 VERSION: 2.0  
 Start time: MMM DD, YYYY@14:53:26  
 Completion time: MMM DD, YYYY@14:53:26  
 Environment: TST^ROU^XXXXXXXX^ROU:XXXXXXXX^FTP/KIDS^Released EC\*2\*XXX SEQ  
 #XXX  
 Installed by: NAME^XXX  
 Install Name: EC\*2.0\*XXX  
 Distribution Date: MMM DD, YYYY

Enter message action (in PATCHES FOR DSS basket): Ignore//

- 2. When an EC NATIONAL PROCEDURES file (#725) patch is loaded. (A review of the EVENT CODE SCREENS file (#720.3) is performed. Event Code Screens which have either inactive CPT codes, inactive Event Capture Codes, or an Event Capture Code with an inactive “default” CPT code attached, are reported.)**

**Example**

From: <EMAIL ADDRESS PROTECTED>  
 Sent: Monday, MONTH DD, YYYY 9:00 PM  
 To: Package Manager  
 Subject: Event Code Screens to Review

Please forward this message to your local DSS Site Manager or Event Capture ADPAC.

A review of the EC EVENT CODE SCREENS file (#720.3) was done after installation of patch EC\*2\*XX which updated the EC NATIONAL PROCEDURE file (#725). This message provides the results of that review.

The EC EVENT CODE SCREENS file (#720.3) records indicated below point to an inactive record in the EC NATIONAL PROCEDURE file(#725) or to an inactive record in the CPT file (#81).

The user should use the Inactivate Event Code Screens [ECNACT] option to inactivate the Event Code Screen. If necessary, a new Event Code Screen can be created using a currently active CPT code or National Procedure.

The CPT procedure for the following Event Code Screen (XXX-X-X-XXXXX) is inactive --

Location: VAMC  
 Category: Treatment  
 DSS Unit: E-KINESIOTHERAPY-IP  
 Procedure: PROSTHETIC TRAINING (97520)

The CPT procedure for the following Event Code Screen (XXX-X-X-XXXXX) is inactive --

Location: VAMC  
Category: Treatment  
DSS Unit: E-KINESIOTHERAPY-IP  
Procedure: PROSTHETIC CHECKOUT (97703)

The CPT procedure for the following Event Code Screen (XXX-XX-X-XXXXX) is inactive --

Location: VAMC  
Category: None  
DSS Unit: PSYCHOLOGY-IP  
Procedure: PSYCHOLOGICAL TESTING (96100)

**Note:**

After a patch updating file #725:  
Check for inactivated national EC Procedure Codes.  
Check for Event Code Screens with out-of-date EC Procedure Codes.

**3. When an ECS User is terminated.**

(May inactivate national EC Procedure Codes and report any Event Code Screens with out-of-date Procedure Codes.)

**Example 1**

Subj: Removed Terminated Users from DSS UNIT Access [#XXXXXXXX] MM/DD/YY@02:30 8 lines  
From: EVENT CAPTURE In 'IN' basket. Page 1 \*New\*

-----  
Event Capture - Terminated Users removed from DSS UNITS

Total number of Terminated users: 1

DSS UNITS      NAME of Terminated User Removed from DSS UNIT

-----  
CHAPLAINS      Facility Staff Name

Enter message action (in IN basket): Delete//

Example 2

Event Capture - Terminated Users removed from DSS UNITS

Total number of Terminated users: 1

DSS UNITS	NAME of Terminated User Removed from DSS UNIT
HCBC REFERRALS/STATS	PROVIDER1, EC
HCBC STAFF PHONE	PROVIDER1, EC
HCBC STAFF PHONE NOT W/PT	PROVIDER1, EC
HCBC VA STAFF	PROVIDER1, EC
SOCIAL WORK - INPATIENT	PROVIDER1, EC
SOCIAL WORK - OUTPATIENT	PROVIDER1, EC
SOCIAL WORK-C&P	PROVIDER1, EC
SOCIAL WORK-GEM	PROVIDER1, EC
SOCIAL WORK-PHONE NOT W/PT	PROVIDER1, EC

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