WinRecs User Guide

Version 2025.01

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MED2020 Health Care Software Inc.

MED2020 Health Care Software Inc. (MED2020) is a leading provider of modular health information management solutions for the health care industry.

MED2020 provides solutions to assist capturing, reporting and analyzing health data to:

- Enable enhanced information sharing
- Encourage informed decision making, and
- Streamline facility operations.

MED2020's flagship product, WinRecs™, is the foundation for a complementary suite of modules designed to assist health information management departments with their operational needs.

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Document Convention

Convention	Description
`screen`	`Courier` font shows an example of information or code displayed on the screen or specific names.
boldface	Boldface text indicates commands; keywords or menu selections you use to do a task. Example: click the menu **File**
italics	Indicates information that should be entered in a field.
→	Indicates navigation from an icon or menu to another. Example: click the menu **File→Open**
	Toolbar Icon – When a specific toolbar item is referenced
[Ctrl + ?] or **[F00]**	This convention is used to describe a specific key combination or key that must be pressed to trigger an action.
Underlined	Underlined text refers to a hyperlink or cross reference

Table 1 - Document convention

This is the note format.

This is the tips format.

Printing This Document

For the best print quality when printing this document, select the Print as Image option in the Adobe® Acrobat® Reader™ print window or the Advance→Print as Image option in the Adobe® Acrobat® print window.

About WinRecs

First introduced to the Canadian market in 1996, MED2020's flagship product, WinRecs™, has evolved to become one of the most comprehensive Health Information Management software solutions on the Canadian market. WinRecs is a customizable abstracting and reporting system that is currently being used by hospitals to support decision-making at corporate, regional and provincial levels. The WinRecs Suite of Products provides solutions for Inpatient, Clinical and Ambulatory Care Services, including modules for DAD, NACRS, CJRR, Cancer Care, OHMRS, NRS and CCRS. Furthermore, WinRecs offers an Edit Engine to allow the creation of user-defined edits, in addition to the complementary modules, Concurrent Review and Chart Maintenance.

WinRecs Features

- Docking windows allow users to expand, collapse, tab or pin information windows in the application, such as Visit History, Message List, Grouper and Module Menu.
- Individuals can customize their view of the abstracting window for font size, row height and column width.
- More options are available to navigate the abstract including the mouse, function or arrow keys or the Enter key to tab through the abstract.
- Text can be directly entered into data entry fields, eliminating the data entry dialog box and reducing key strokes. Users may also copy and paste directly into text fields.
- Contextual look up tables can be accessed by double-clicking in the entry field.
- Multiple abstracts can be open at the same time, allowing users to toggle between as many open abstracts as they like. The active window is highlighted so users are certain which abstract is being worked on.
- Multi-forms are presented in a new horizontal format which allow users to see multiple lines of occurrences at a single glance.
- Multi-form columns can be re-arranged for quick revisions to data.
- An Edit Engine module provides users with an intuitive interface that enables health records professionals to define and create their own data quality edits.

1. Opening the WinRecs Application

To open the application, double-click on the shortcut displayed below:

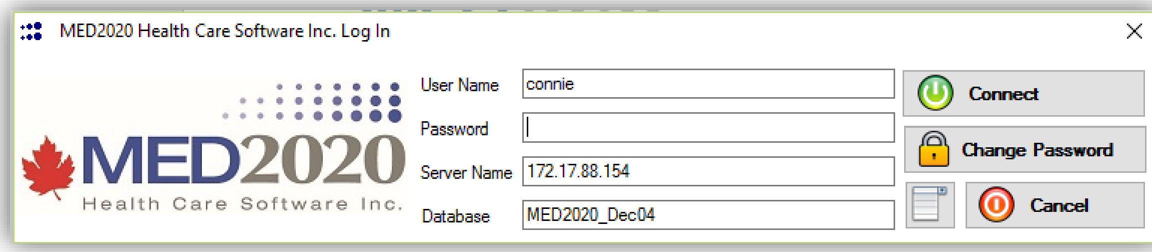


Figure 1 - Log In Screen

If the WinRecs application cannot be found on the workstation contact the site IT department.

- `User Name`**:** This is assigned by the System Administrator
- `Password`**:** This is assigned by the System Administrator. Change the password at any time by clicking on the 'Change Password' button on the right hand side of the Log in Window. The password area is masked for security reasons.
- `Server Name`**:** Depending on whether the dropdown or text options is selected. Press the down arrow and choose the Server Name where WinRecs resides or Type in the Server Name. The information will retain for subsequent sign in.
- `Database Name`**:** Depending on whether the dropdown or text options is selected. press the down arrow and these are databases available for the Server or type in the Server Name. This will retain for subsequent sign in.

The buttons displayed in the WinRecs Log On dialog are:

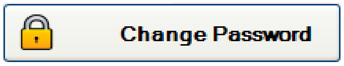
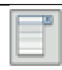
	Click this button to log in to WinRecs once all fields have been populated.
	Click to initiate a password change.
	Click to close the log in screen
	Click this button to toggle between the drop down and text field options for Server Name & Database.

Table 2 – WinRecs Log On

Changing your Password:

To change an existing password, type in the current password but **do not** hit '**Enter**' or **'OK'** *(this will actually log into the WinRecs application)*.

Click on the **Change Password** button.

Type a new password, and confirm in the boxes provided. Click **Change Password** and the new password will be saved.

Clicking **Cancel** will return to the initial sign on.

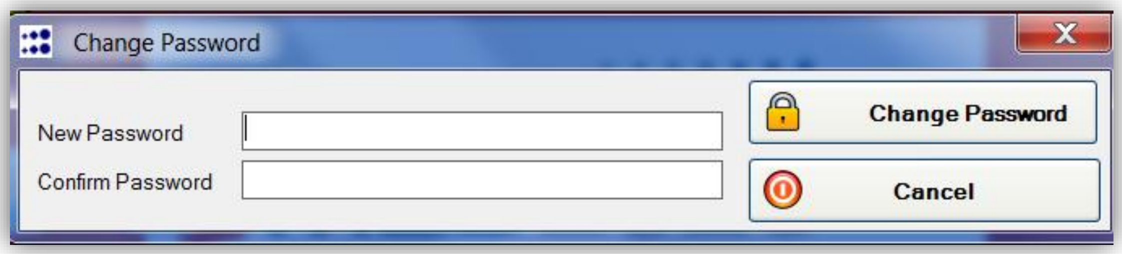


Figure 2 – Change Password

For security reasons, the password is masked. WinRecs tracks all user activity. For new installation, it is recommended to change a password as soon as possible. Do not share this password and passwords are case sensitive.

Once **Connect** is clicked or press **Enter**, the CIHI Licensing requirement is displayed press **OK** button or **ESC** key on the keyboard to bypass this screen.

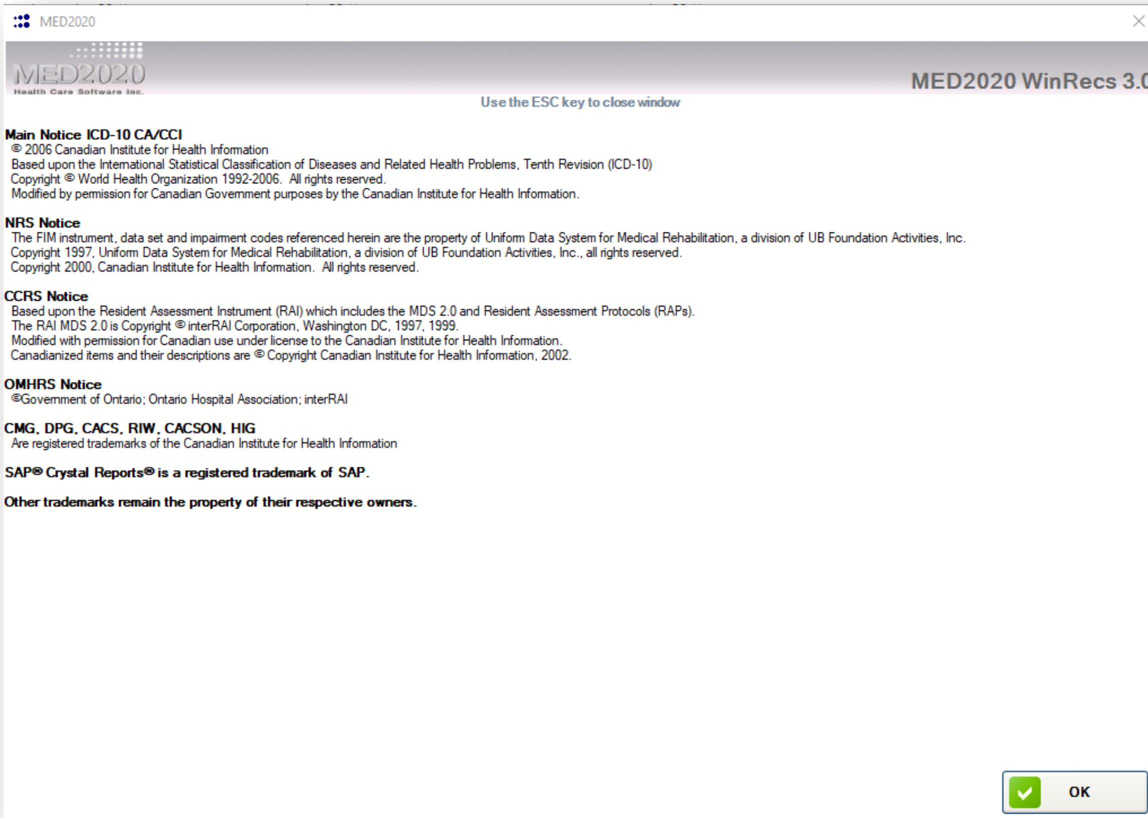


Figure 3 – License Agreement Window

1.1 Custom Privacy Message

The Privacy Message can be set at the Regional or Hospital Level from the Options tab. By default, this feature is disabled and only available if there is text entered into the Privacy Message field for either the Regional Profile or Hospital Profile. If no text is entered at either level, then the Privacy Message will not show.

If there is text entered, then The Privacy Message will be displayed after the user closes the License screen. The Privacy Message will display the message provided in the Regional or Hospital Profile with the option to Accept or Decline. If the user accepts the agreement, then they will have access to WinRecs. However, if the user declines the agreement, they are immediately logged off the application.

If there is a message in both the Regional and Hospital settings, then the Hospital Privacy Message will override the Regional Privacy Message.

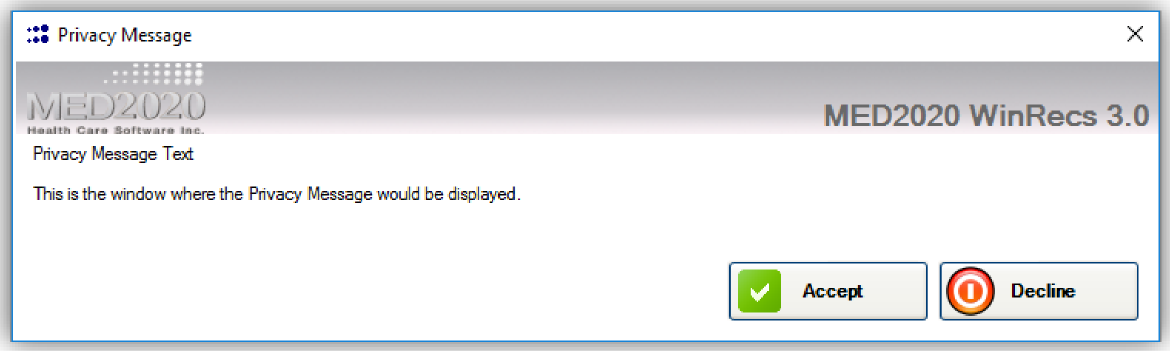


Figure 4 - Privacy Message

To configure

- At the Regional Level: Enter text in the “Privacy Message” field in Regional Profile settings. The privacy message will be the same for all the Hospitals in that Region.
- At the Hospital Level: Enter text in the “Privacy Message” field in Hospital Profile settings. The privacy message will only display for all the institution assigned to that specific hospital.

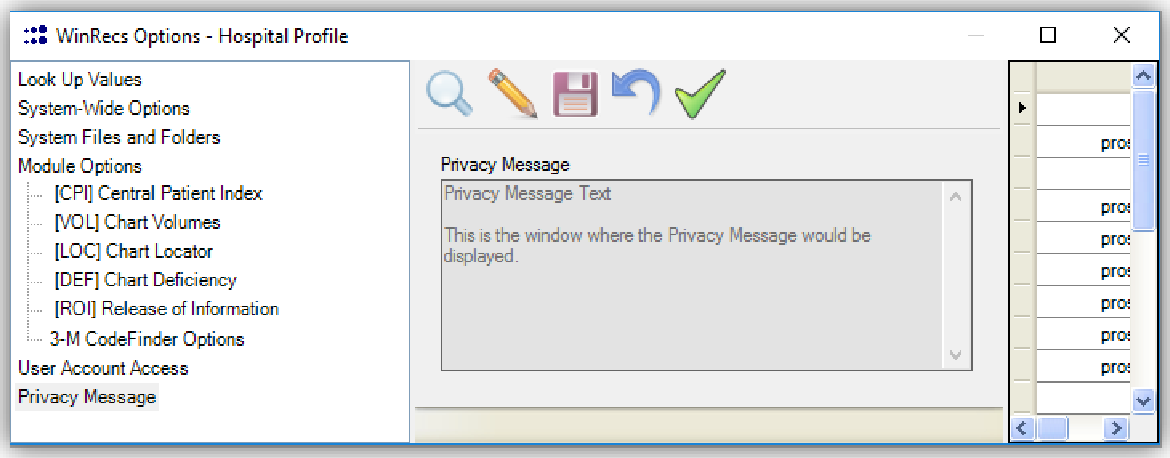


Figure 5 - Configure Privacy Message

1.2 WinRecs User Interface

WinRecs uses the newest technology available to deliver a state of the art user interface, which allows users to tailor the display of individual tasks and user preferences. To provide this new feature, the concept of Dockable windows is used. Dockable windows and their management will be described in this section. The following section will describe the parts of the user interface; the menu items and toolbar actions.

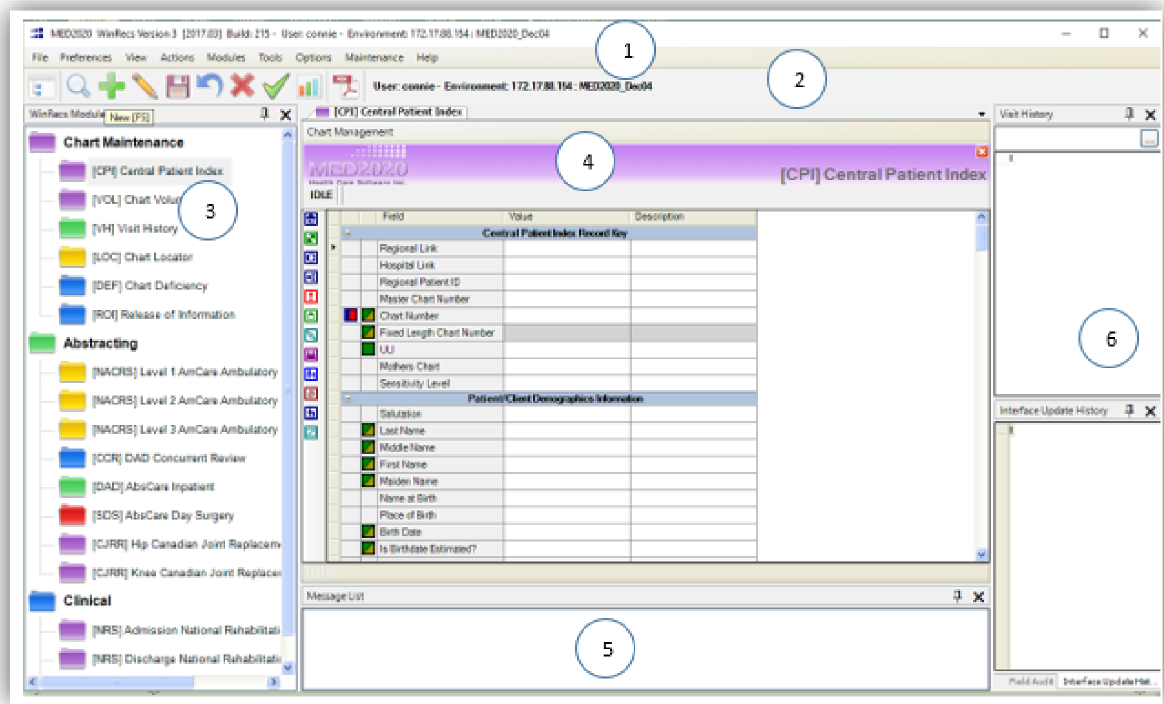


Figure 6 - Main Screen

1. The Menu Bar – The menu bar displays the menu items which include **File, Preferences, View, Actions, Modules, Tool, Options, Maintenance** and **Help.**
2. The Toolbar – The toolbar provides single-click shortcuts to commonly used activities.
3. WinRecs Module Menu – This Dockable Window provides access to the WinRecs modules. Only the module(s) licenced by the site's institution will be listed.
4. Main Window – This is the main part of WinRecs. It displays all currently opened abstracts.
5. Message List – This Dockable window displays information messages from the system, hard errors and warnings for Canadian Institute for Health Information (CIHI) edits and user defined edits created using the Edit Engine module.
6. Dockable Windows – This allows a user to customize what they would like to display from the options from the View menu bar.

1.3 The Menu Bar

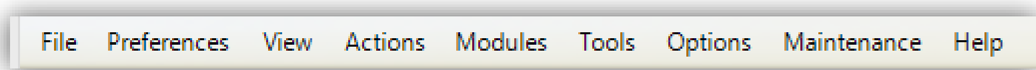


Figure 7- Menu Bar

The menu bar provides access to all of the functions of WinRecs. Only the functions and modules licenced by the user’s institution will be available.

The File Menu

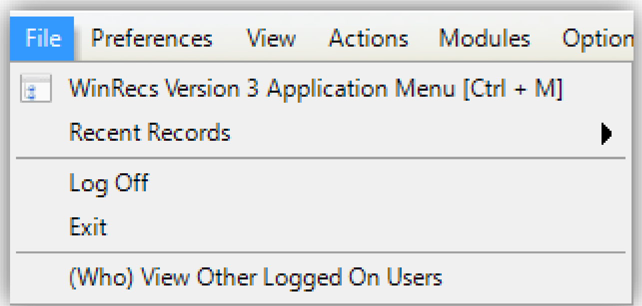
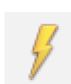
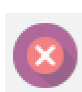
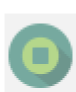


Figure 8 - The File Menu

The **File** Menu provides access to core functions of WinRecs. The features included are:

- `WinRecs Version 3 Application Menu [CTRL + M]` – Displays the WinRecs Module Menu.
- `Recent Records` – Hovering will open a list of the l0 last records accessed.
- `Log Off` – Logs the user off and returns to the Log In screen.
- `Exit` – Exits the application. When finished using WinRecs it is best practice to use Exit from the File Menu.
- `(Who) View Other Logged On Users` – Opens the Other Logged In Users (Who) page, with the options to:
  -  ‘Clear My Dead Log In’ – Clears any log in that is not being used by the user
  -  ‘Log Off User’ – Allows the user to log off any other one user
  -  ‘Log Off All Users’ – Allows the user to log off all users

The Preferences Menu

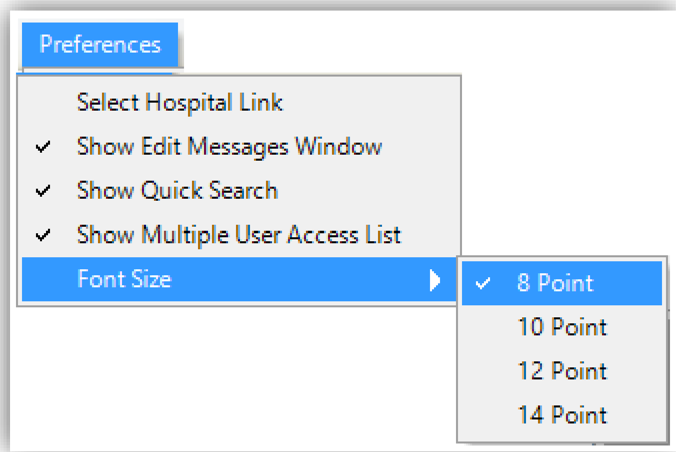


Figure 9 - The Preference Menu

The Preferences Menu provides access to certain user preference settings in WinRecs. The features included are:

- `Select Hospital Link` – A pop up display which allows users with regional access to select the preferred hospital link.
- `Show Edit Messages Window` – Displays the Edit Messages Window, can press 'Esc' button to remove the message.
- `Show Quick Search` – Displays the Quick Search Window.
- `Show Multiple User Access List` – Displays the Multiple User Access List Window.
- `Font` – Allows you to change the font size used to display the information in the modules, `Grouper` Window and `Record Information` window.

The View Menu

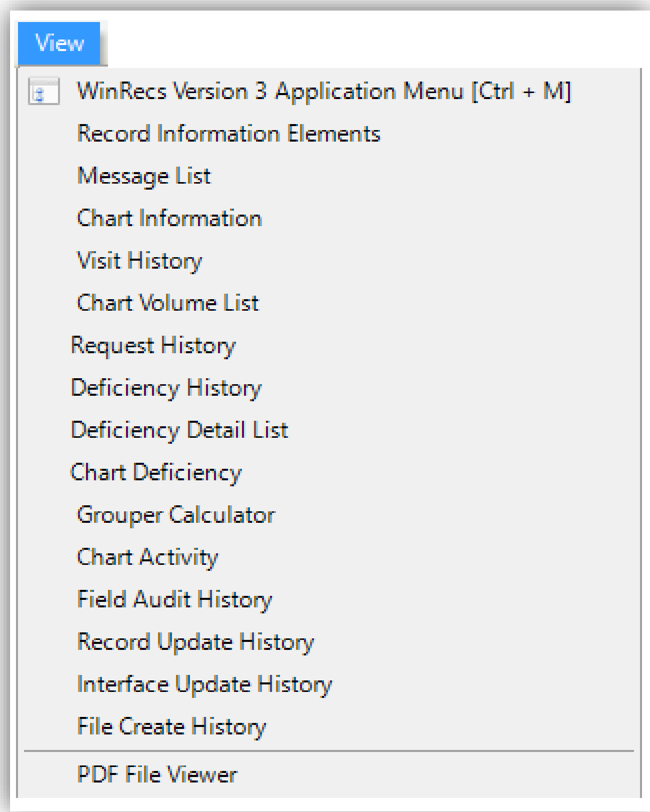


Figure 10 - The View Menu

The View Menu provides access to the view functions in WinRecs. It allows the user to view the windows that are not displayed. Selecting one of the View Menu items will open the selected window in the last location it was previously opened.

- `WinRecs Version 3 Application Menu [CTRL + M]` – Displays the WinRecs Module Menu.
- `Record Information Elements` – Displays the Record Information Element window.
- `Message List` – Displays the Message List window.
- `Chart Information` – Displays the Chart Information window.
- `Visit History` – Displays the Visit History window.
- `Assessment Links` – Displays the Clinical Modules assessment links
- `Chart Volume List` – Displays the Chart Volume window.
- `Request History` – Displays the Request History window.
- `Deficiency History` – Displays the Deficiency History window.
- `Deficiency Detail List` – Displays the Deficiency Detail List window.
- `Chart Deficiency` – Displays the Chart Deficiency window.

- `Grouper Calculator` – Displays all grouper calculations pertaining to the accessed module.
- `Cancer Disease Registration` – Displays the Cancer Disease Registration information
- `Chart Activity` – Displays the Chart Activity
- `Field Audit History` – Displays the Field Audit History window.
- `Record Update History` – Displays the Record Update History window.
- `Interchange Update History` – Displays the Interchange Update History window.
- `File Create History` – Displays the File Create History window.
- `PDF File Viewer` – Launches the window to open PDF files.

The Actions Menu

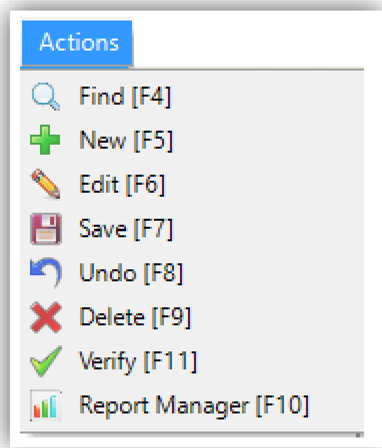


Figure 11 - The Actions Menu

The Actions Menu provides access to all of the actions available in WinRecs. All of the action items are available on the Toolbar and via shortcut keys. The Toolbar and shortcut keys are described below.

- `Find` **[F4]** – Opens the Record Search window. This window is context sensitive and will automatically select the appropriate module based on the currently selected module in WinRecs.
- `New` **[F5]** – Creates a new record in the currently selected module.
- `Edit` **[F6]** – Enables editing of the currently selected record.
- `Save` **[F7]** – Saves the current record if there are unsaved changes.
- `Undo` **[F8]** – Undoes any unsaved changes to the current record and returns it to the previously saved state.
- `Delete` **[F9]** – Deletes the current record.
- `Verify` **[F11]** – Verifies the current record for any errors or warnings.
- `Report Manager` **[F10]** – Opens the Report Manager window.

The Modules Menu

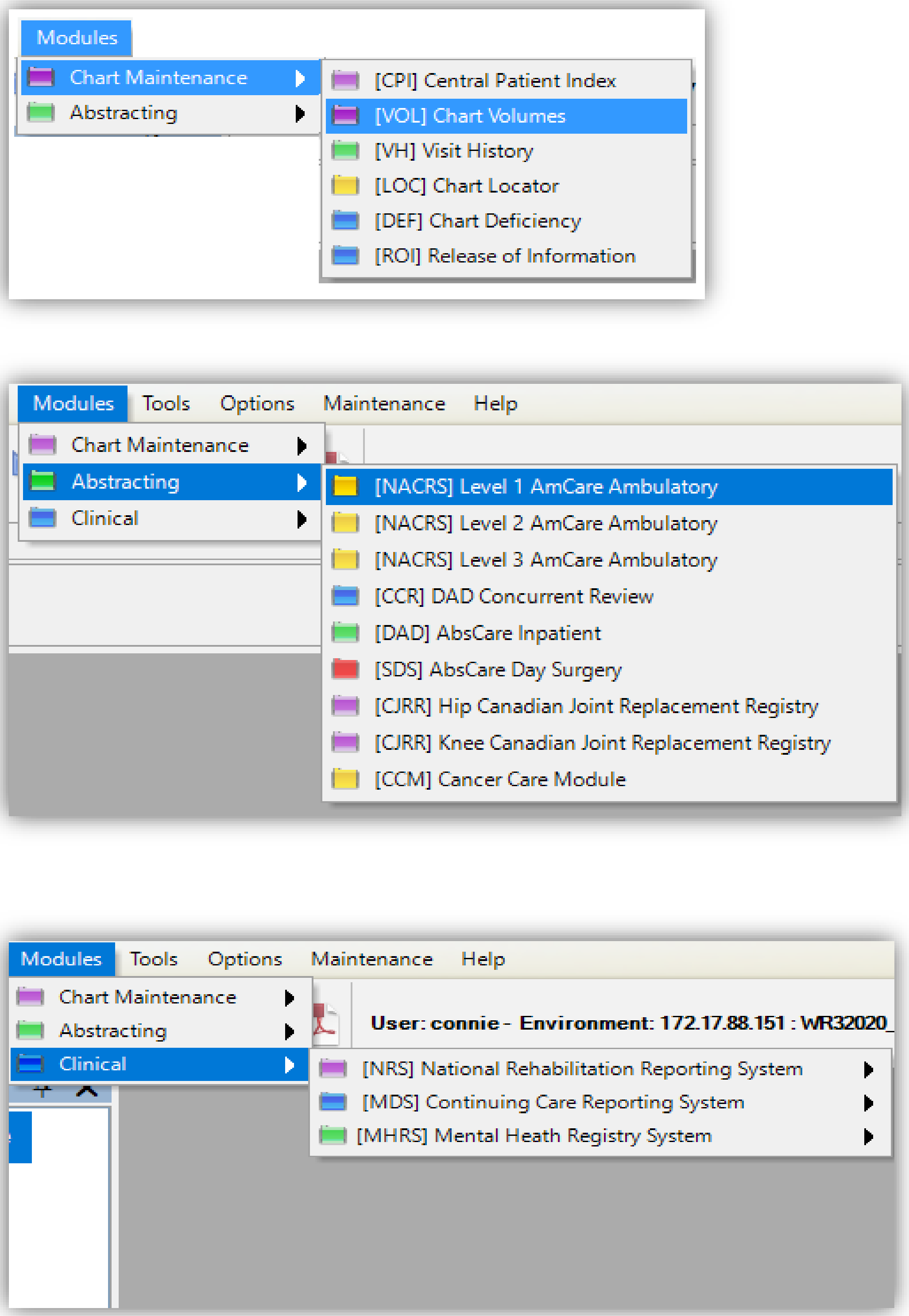


Figure 12 - The Modules Menu

The Modules Menu provides access to all the modules of WinRecs. Selecting an item from this menu will add a new tab in the Main window. It allows you to toggle between tabs in the Main window.

The Tools Menu

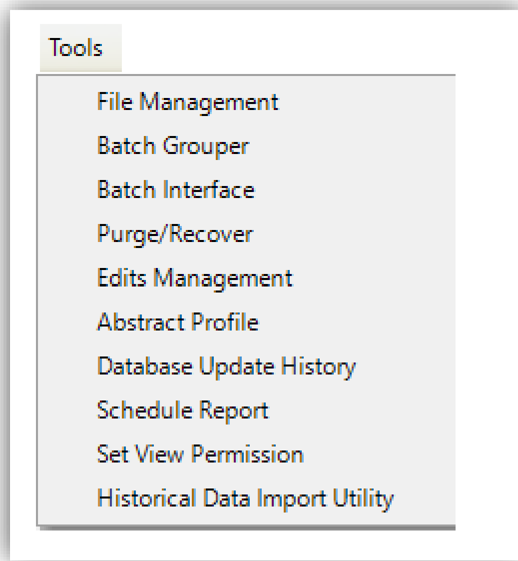


Figure 13 - The Tools Menu

The Tools Menu provides access to the following functions:

- `File Management` – Creates the CIHI submission, correction, deletion, institution and no separation files.
- `Batch Grouper` – Running the Batch Grouper ensures that Grouper values are assigned to all records in a batch.
- `Batch Interface` – Allows users to locate and run an existing batch interface.
- `Purge/Recover` – Used to completely remove or restore deleted data.
- `Edits Management` – Allows users to create their own user-defined data quality edits that are run at the time of validation with other CIHI-defined edits.
- `Abstract Profile` – Creates the Abstract Profile for DAD/SDS/NACRS.
- `Database Update History` – The area to run .wru patches
- `Schedule Report` – The ability to attach reports to modules and set up report schedules.
- `Set View Permission` – The ability to allow users access to the views or have Read-Only access.
- `Historical Data Import Utility` – The ability to allow users access to Historical Data Import Utility (HDIU).

The Options Menu

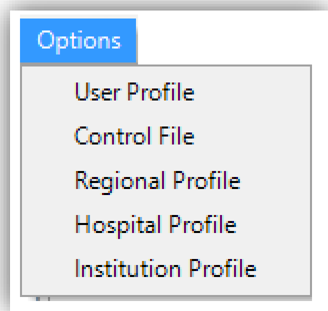


Figure 14 - The Options Menu

The Options Menu provides access to the following functions:

- `User Profile` – Maintains the users of the system and their privileges.
- `Control File` – Used to specify default values for fields, change field names, restore fields to the main grid, make fields visible/invisible or enable/disable fields for each module.
- `Regional Profile` – Maintains the regional profile of the system.
- `Hospital Profile` – Maintains the hospital profile.
- `Institution Profile` – Maintains the institution profile.

The Maintenance Menu

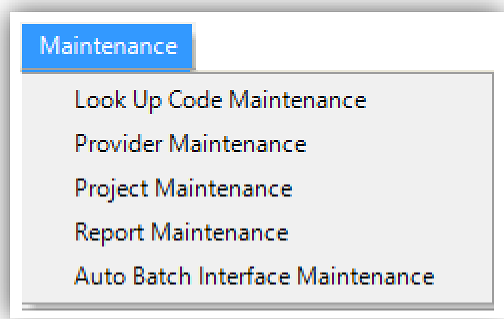


Figure 15 - The Maintenance Menu

The Maintenance Menu provides access to the following functions:

- `Look Up Code Maintenance` – Opens the Look Up Code Maintenance window.
- `Provider Maintenance` – Opens the Provider Maintenance window to edit information for a facility's physicians and other health providers.
- `Project Maintenance` – Open the Project Maintenance window to add new projects or edit existing projects.

- `Report Maintenance` – Opens the Report Maintenance window to run and schedule Crystal Reports within WinRecs.
- `Auto Batch Interface Maintenance` – Opens the Auto Batch Interface to run the batch in/out Interface.

The Help Menu

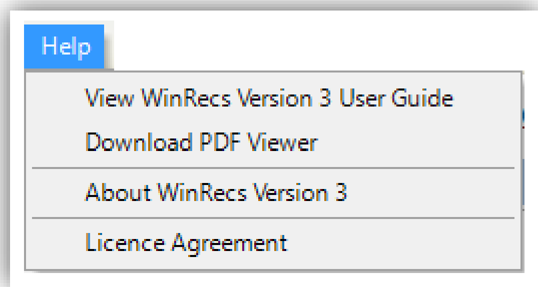
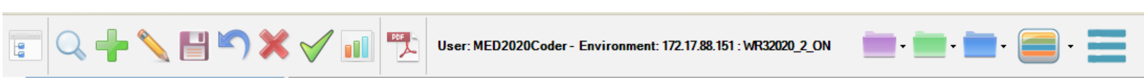


Figure 16 - The Help Menu

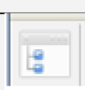
The Help Menu provides access to the following functions:

- `View WinRecs Version 3 User Guide` – Open the WinRecs User Guide (this document) in PDF format.
- `Download PDF Viewer` – Downloads and installs the Adobe® Acrobat® Reader™.
- `About WinRecs Version 3` – Opens the About dialog box and displays the WinRecs application information and MED2020 contact information.
- `Licence Agreement` – Opens the licence agreement window.

1.4 The Toolbar



The toolbar provides quick access to all of the actions that can be performed in WinRecs.

Icon	*Menu Item*	*Function*	*Keyboard*
	**Module Menu**	Opens the WinRecs Module Menu	[Ctrl+M]
	**Find**	Search for a record	[F4]
	**New**	Creates a new record	**[F5]**
	**Edit**	Makes changes to a record.	**[F6]**

	Save	Saves changes to the current record.	**[F7]**
	Cancel	Cancels changes made to record since the previous save. Warning prompt will display.	**[F8]**
	Delete	Deletes a record and puts in the purge file	**[F9]**
	Verify	Verifies (edit checks) the current record, without saving the record. This is applicable for abstracting modules.	**[F11]**
	Print	If applicable , this button displays a list of available reports to view on screen (or view/print).	**[F10]**
	PDF viewer	Opens the Windows Explorer folder allowing you to view PDF files stored on the PC or Server. The path to the scanned patient records will be provided to you by your instructor.	**N/A**
	Chart Maintenance Menu	Allows quick access to Chart Maintenance Menu	**N/A**
	Abstracting Menu	Allows quick access to Abstracting menu	**N/A**
	WinRecs Environment Colour	Allows the user to assign specific colour to a WinRecs Session. This is beneficial if user accesses more than one WinRecs environment.	**N/A**
	Abstract Queue	Allows the user to access the Abstract Queue	**N/A**

Table 3 - The Toolbar Icon

WinRecs Shortcuts Cheat Sheet

Shortcut	Action
[F2]	Opens the Lookup table for the selected field.
[F3]	Fields grid quick search; only available in modules.
[F4]	Opens the Find dialog box for the selected module or field.
[F5]	Creates a new record in the current module.
[F6]	Set the current record in edit mode.
[F7]	Saves the current record.
[F8]	Undoes any unsaved changes to the current record and returns it to the previously saved state.
[F9]	Deletes the current record.
[F10]	Report Manager
[F11]	Verifies the current record for any errors.
[CTRL + M]	Displays the WinRecs Module Menu.
[ALT + F3]	Opens the Notes Window
[ESC]	Closes popup messages
[CTRL + C]	Copies Fields that are enabled
[CTRL + V]	Pastes fields that have been copied

Table 4 - WinRecs Shortcuts

Figure 17 shows enabled fields have white background and disabled fields have grey backgrounds.

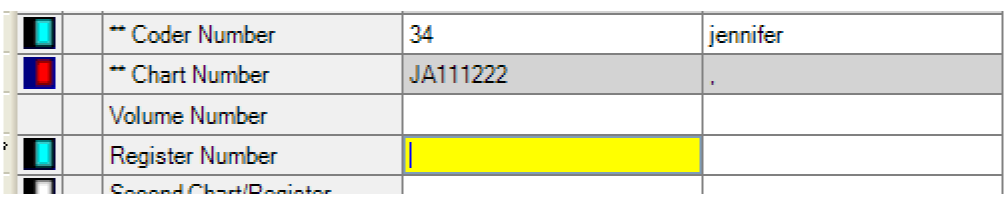


Figure 17 - Fields

In order to copy text from a disabled field, user can right click the field and selecting copy.

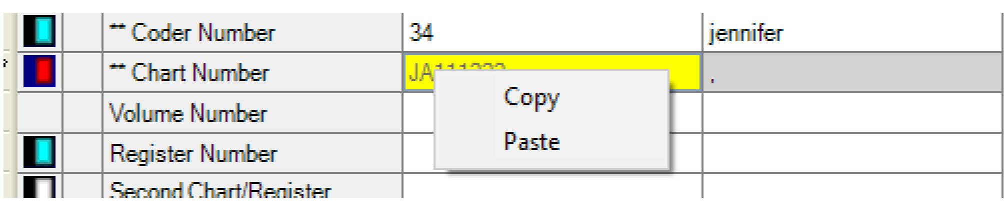


Figure 18 - Copy Option

1.5 Dockable Windows

WinRecs now allows moving, hiding, custom sizing, docking or undocking of certain windows.

A Dockable window is a window that can exist in a floating state or be attached to the main application window. This feature allows the user to tailor the user interface to suit their particular needs. By being able to hide, dock or float some windows, the user can display only the information necessary to perform specific tasks. This section will explain how to manage the Dockable windows.

The highlighted windows below - WinRecs Module Menu, Message List, Chart Information and Field Audit - are dockable. The dimmed portion, in the center of the figure, is the main abstracting area. This is where the module-specific windows will be added.

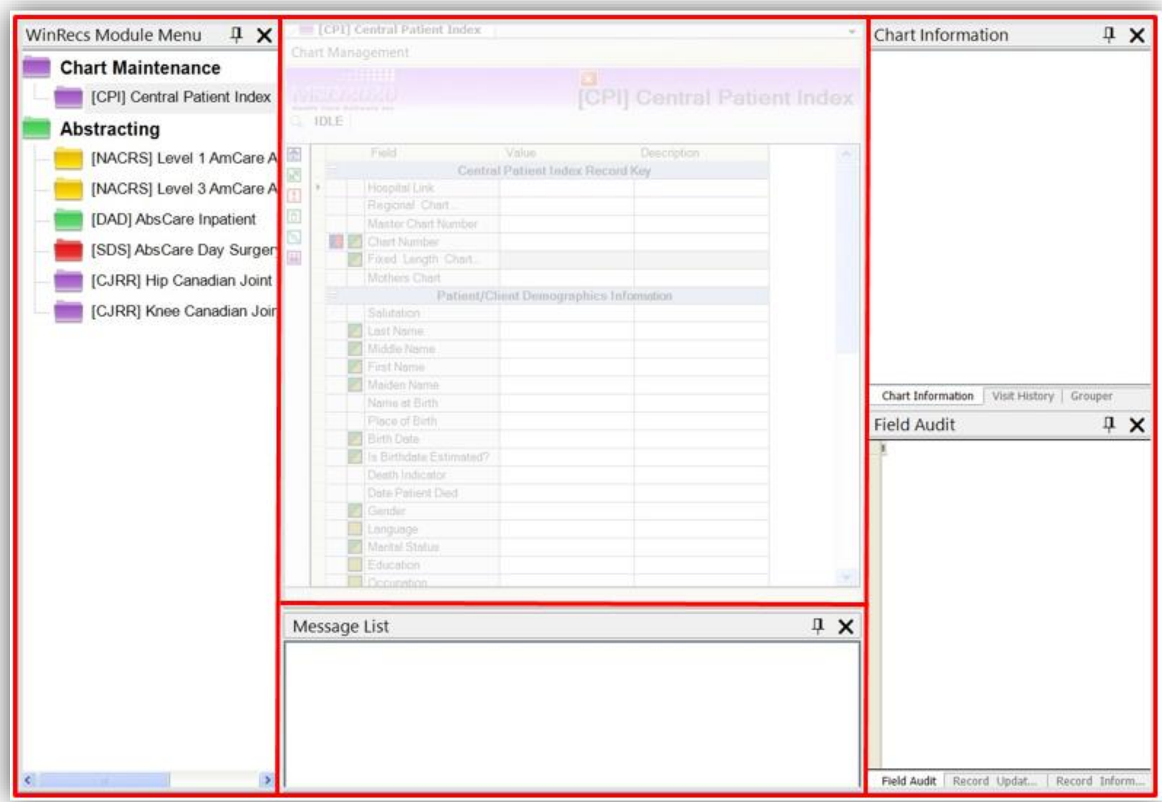


Figure 19 - Dockable Windows

Dockable Window Parts

A Dockable window has a title bar, control buttons and a display area.

- **Title Bar** – Displays the name of the window. Can be used to drag the window or to make the window float or dock. How to interact with the title bar is described in detail in this section.
- **Control Buttons**

	This button will switch the AutoHide feature. The Pin pointing down is displayed when AutoHide is disabled and the window is showing. The Pin pointing to the left indicates that AutoHide is enabled; the window automatically hides when the focus is on a different window. Interacting with the pin button is described in detail in this section.
	Clicking this button will close the window. Closed windows can be reopened via the **View** menu. Example: after closing the Visit History window it can be reopened by selecting **View→Visit History**.

Table 5 – Control Buttons

- **Display** – This area displays the content of the window. Users can interact with it at all times; floating or docked.

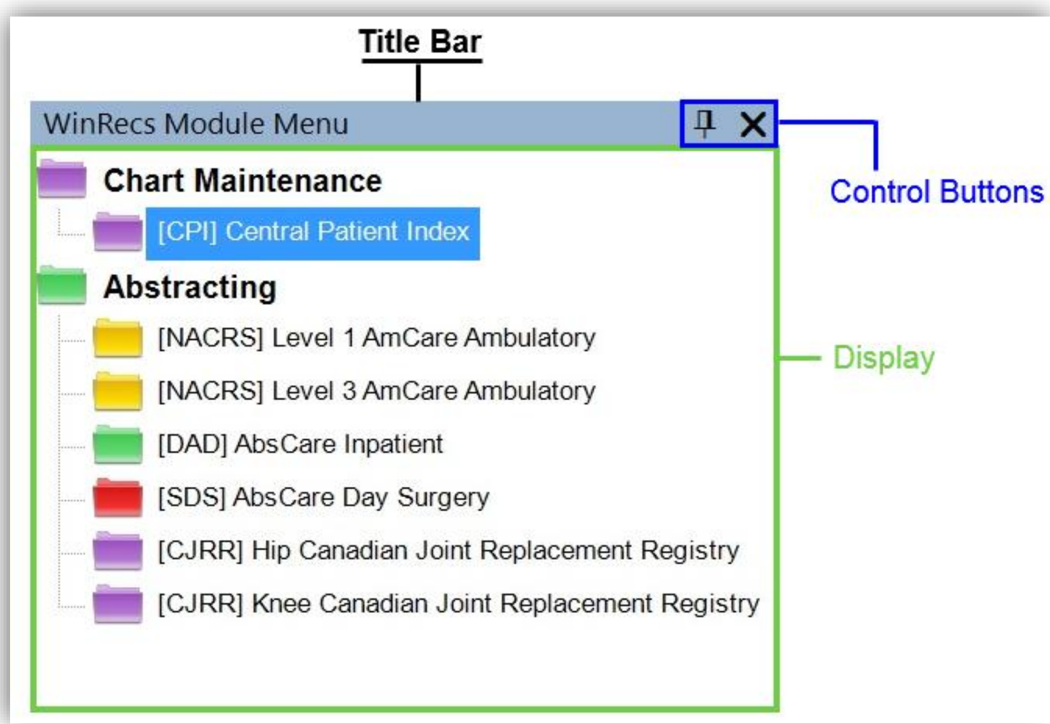


Figure 20 - Dockable Window Parts

Pin / AutoHide

The following windows support Pin/AutoHide: WinRecs Module Menu, Record Information Elements, Message List, Chart Information, Visit History, Request History, Grouper Calculator, Field Audit History, Record Update History, Interchange Update History and File Create History. This feature allows a user to hide a window while being able to quickly consult the information displayed in it. This feature is only to show or hide the window; to change the location of the window see To turn off AutoHide

- Click the window to keep visible and to give it focus.
- Click the Pin icon on the title bar.

AutoHide Disable 

When AutoHide is disabled the window will be visible, docked left, right, up or down.

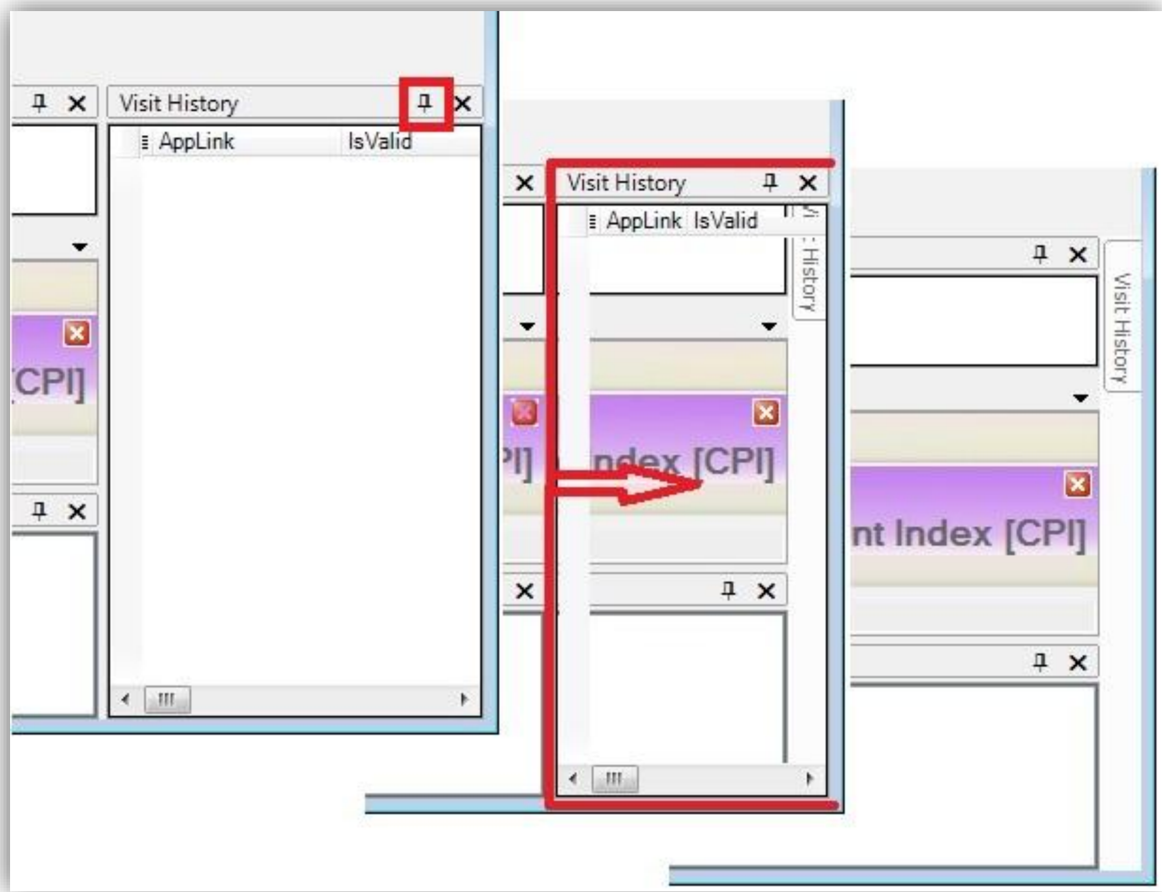


Figure 25 - Example of AutoHide

To dock a window.

To turn on AutoHide

- Click on the window needed to keep visible and to give it focus.
- Right click the title bar to display the context menu, then click **AutoHide**.

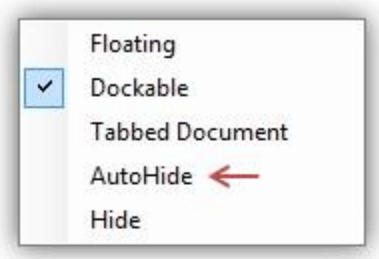


Figure 21 - Dock Context Menu (AutoHide)

— or —

- Click the Pin on the title bar of the window.

  AutoHide Enabled 

  When an "AutoHidden" window loses focus it will automatically slide back to its edge, creating a tab with the name of the window.

Close/Hide

The following windows support Close / Hide: WinRecs Module Menu, Record Information Elements, Message List, Chart Information, Visit History, Request History, Grouper Calculator, Field Audit History, Record Update History, Interchange Update History and File Create History. This feature allows the user to hide a window that is not regularly needed.

To close/hide a window

- Click the window needed to keep visible and to give it focus.
- Right click the title bar to display the context menu, then click **Hide**.

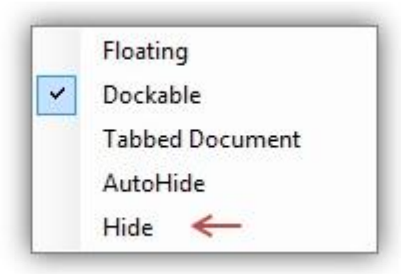


Figure 22 - Dock Context Menu (Hide)

— or —

- Click the  on the title bar of the window.

To show a closed window

- Open the **View** menu, then select the window to display.
    - If the window you select is already displayed no action will be performed
    - The window will be displayed at its last location.

  — or —

- To show the WinRecs Module Menu press **[CTRL + M]**

  — or —

- To show the WinRecs Module Menu press  on the Toolbar

Floating/Docking

A floating window appears detached from the main screen and can be displayed outside of the boundary of WinRecs or on a different screen (when using a dual monitor workstation).

To float a window

- Click the window needed to keep visible and to give it focus.
- Right click the title bar to display the context menu, then click **Floating**.

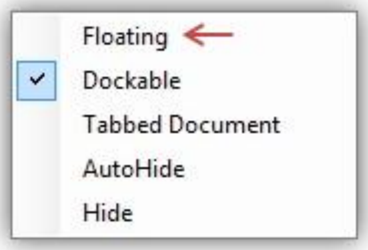


Figure 23 - Dock Context Menu (Floating)

— or —

- Double click the title bar of the window to automatically make the window float.

— or —

- Click and drag the title bar to make the window float. Release the drag action when the window is in the desired position.

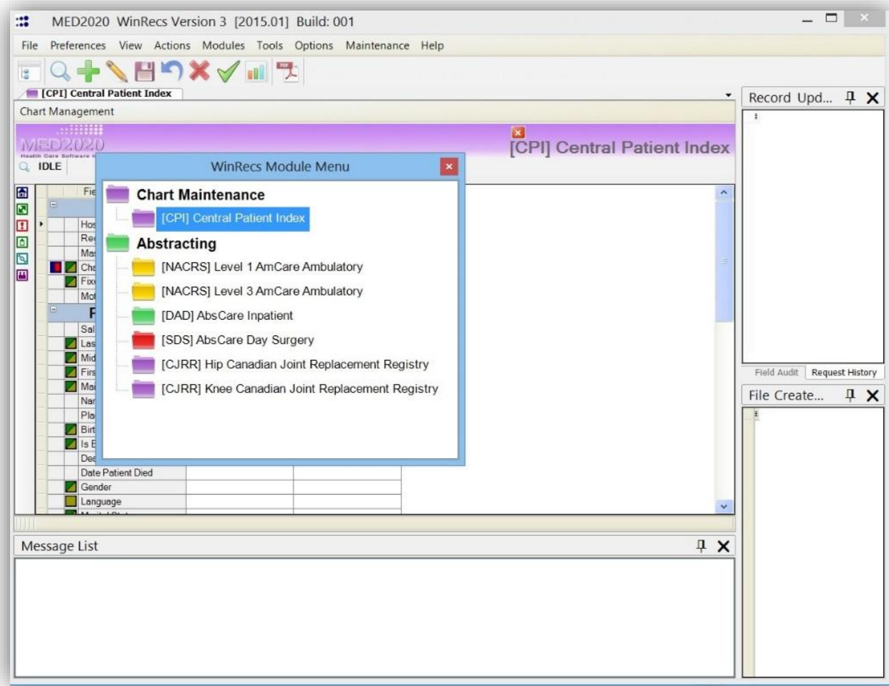


Figure 24 - Example of a Floating Window

To turn off AutoHide

- Click the window to keep visible and to give it focus.
- Click the Pin icon on the title bar.

AutoHide Disable 

When AutoHide is disabled the window will be visible, docked left, right, up or down.

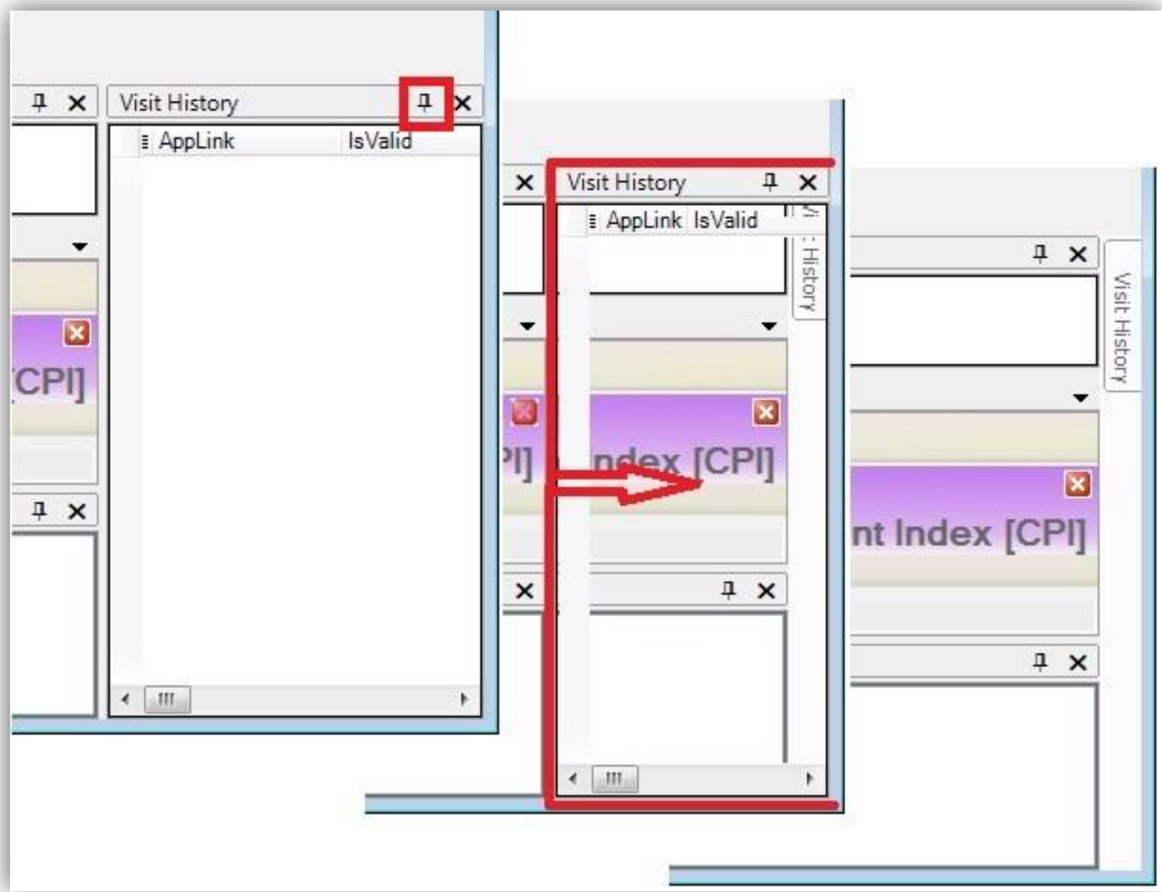


Figure 25 - Example of AutoHide

To dock a window

- Click the window needed to keep visible and to give it focus.
- Right click the title bar to display the context menu, then click **Dockable**.

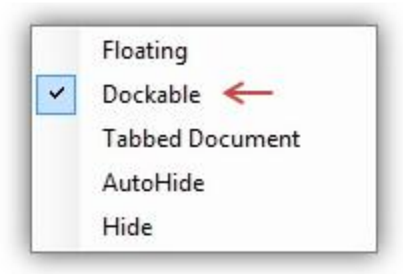


Figure 26 - Dock Context Menu (Dockable)

— or —

- Double click the title bar of the window to automatically dock the window to its last docked position.

— or —

- Click and drag the title bar to make the dock controller appear. Drag the cursor over the dock controller to dock the window to the desired position.

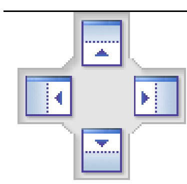
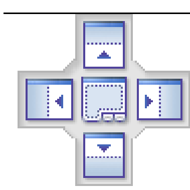
	Docks to the top of the application.
	Docks to the right of the application.
	Docks to the bottom of the application.
	Docks to the left of the application.
	This control is displayed in the center of the application and allows you to dock the floating window to any location based on the selected control you drop the window on.
	This control is displayed in a docked window. It allows you to create a group of window tabs, explained in Docked window group.

Table 6 - Docking Controls

Example of docking controls

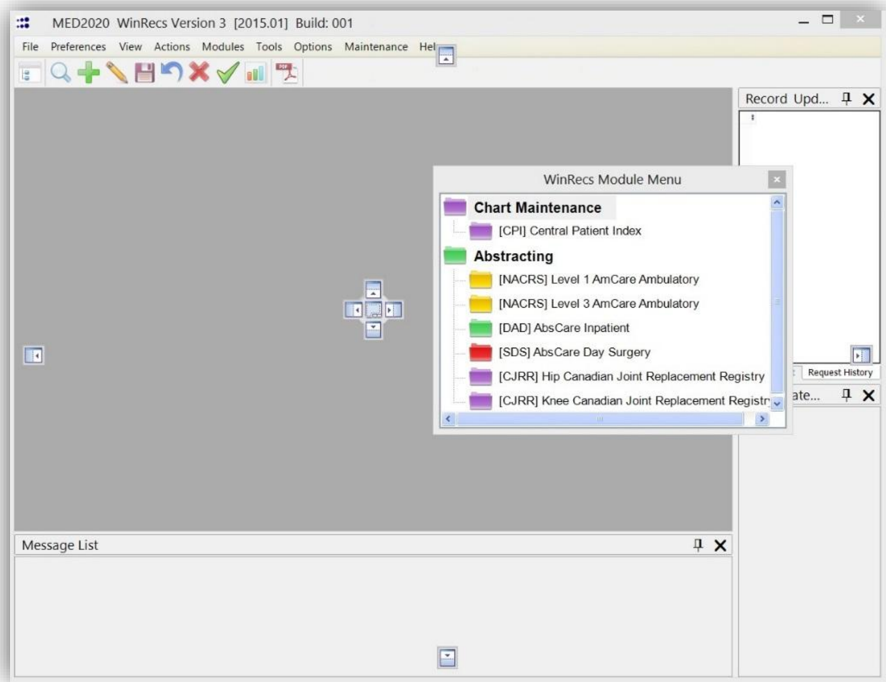


Figure 27 - Example of the dock controls

Example of docking control for tabbed windows

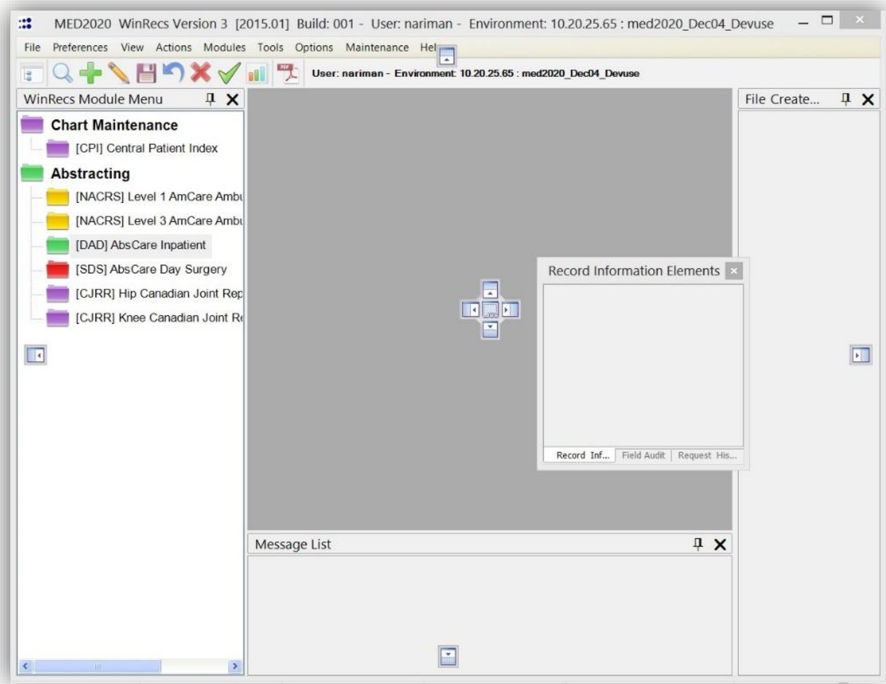


Figure 28 - Example of docking control for tabbed windows

Docked window group

Grouping docked windows in tabs allows the user to minimize the space used by the windows while giving the ability to quickly toggle between the windows.

As seen in the figure below the `Grouper` and `Visit History` windows are grouped.

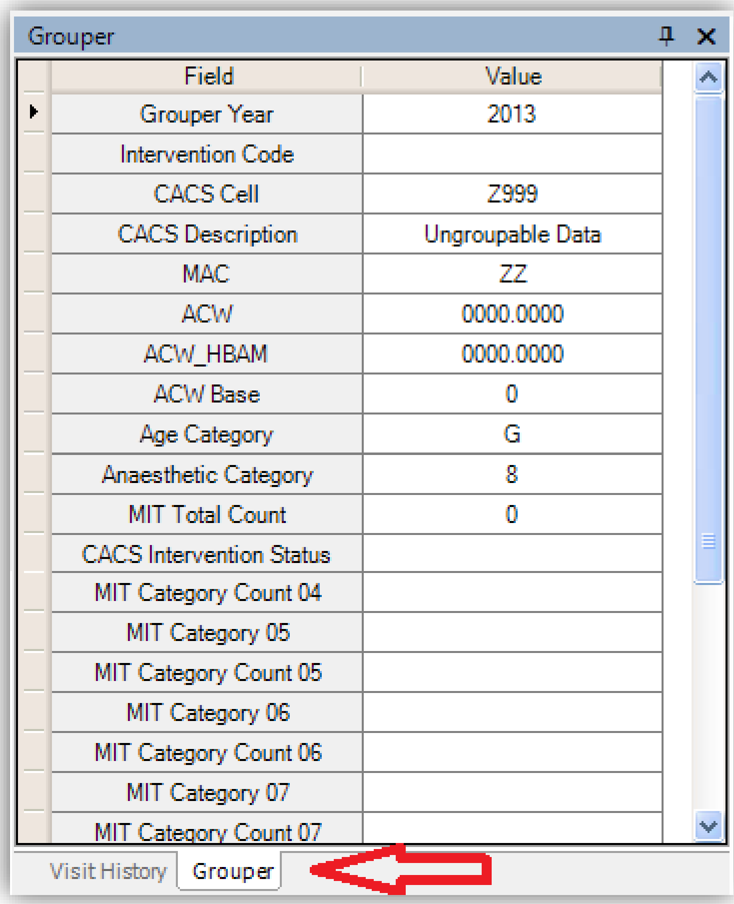


Figure 29 - Example of grouped docked windows

To toggle between grouped docked windows

- Click on the tab of the window the user wants to view.

To group Dockable windows

- Follow the instruction <u>To turn off AutoHide</u>
- Click the window to keep visible and to give it focus.
- Click the Pin icon on the title bar.

AutoHide Disable

When AutoHide is disabled the window will be visible, docked left, right, up or down.

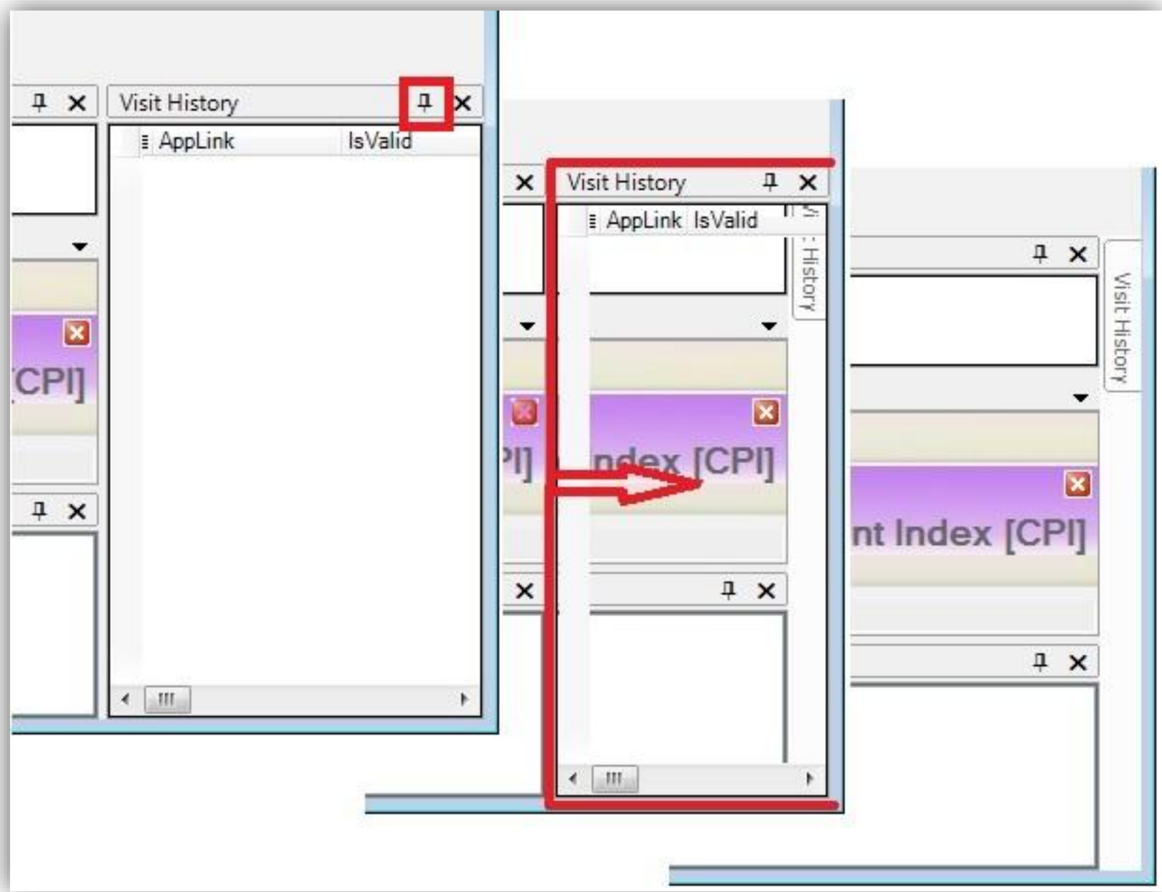


Figure 25 - Example of AutoHide

- To dock a window and drop the window on the docking tab control 

Resizing a window

Windows can be resized, which allows the user to view more of the data needed to see to perform the tasks. Docked and floating windows can be resized.

To resize a floating window with the mouse

- Move your cursor to the edge of the window; the mouse pointer will switch to an adjustment icon.

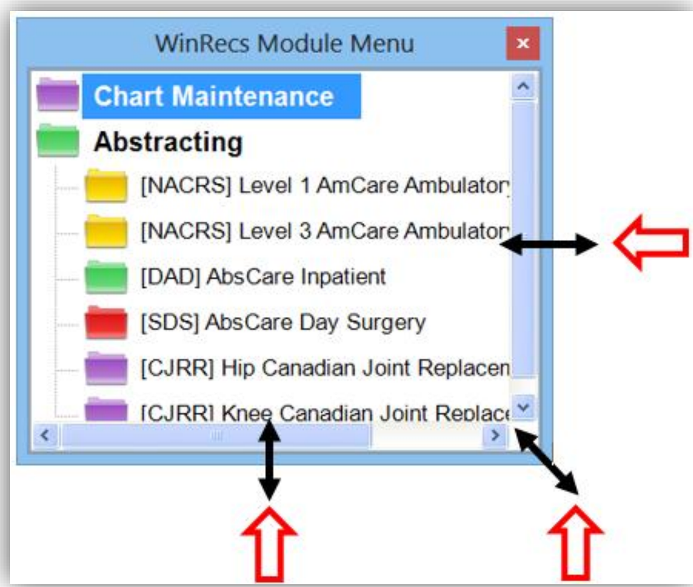


Figure 30 - Window resizing with the mouse pointer

- When the mouse pointer icon is displayed as an adjustment icon, click and drag the edge of the window.
- Release the drag motion when the window is the desired size.

To resize a floating window with the keyboard

- Press **[ALT + SPACEBAR]** to display the window context menu.

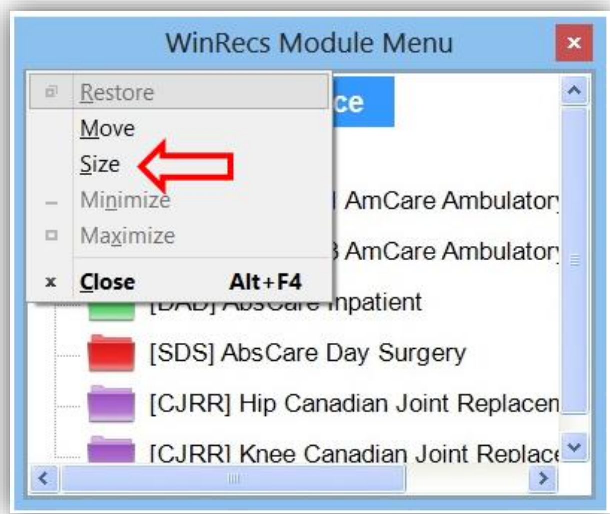


Figure 31 - Floating window context menu Click Size.

— or —

- Press **[ALT + S].**

— or —

- Move the focus to **<u>S</u>ize** using the keyboard arrows.

Next:

- Use the keyboard arrows to resize the window to the desired size.
- When the window is the desired size, press **[ENTER].**

To resize a docked window with the mouse

Docked windows can only be resized with the mouse.

- Move the cursor to the edge of the window; the mouse pointer will switch to an adjustment icon.

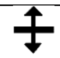
	For side docked windows
	For top and bottom docked windows

Table 7 - Docked Window Cursors

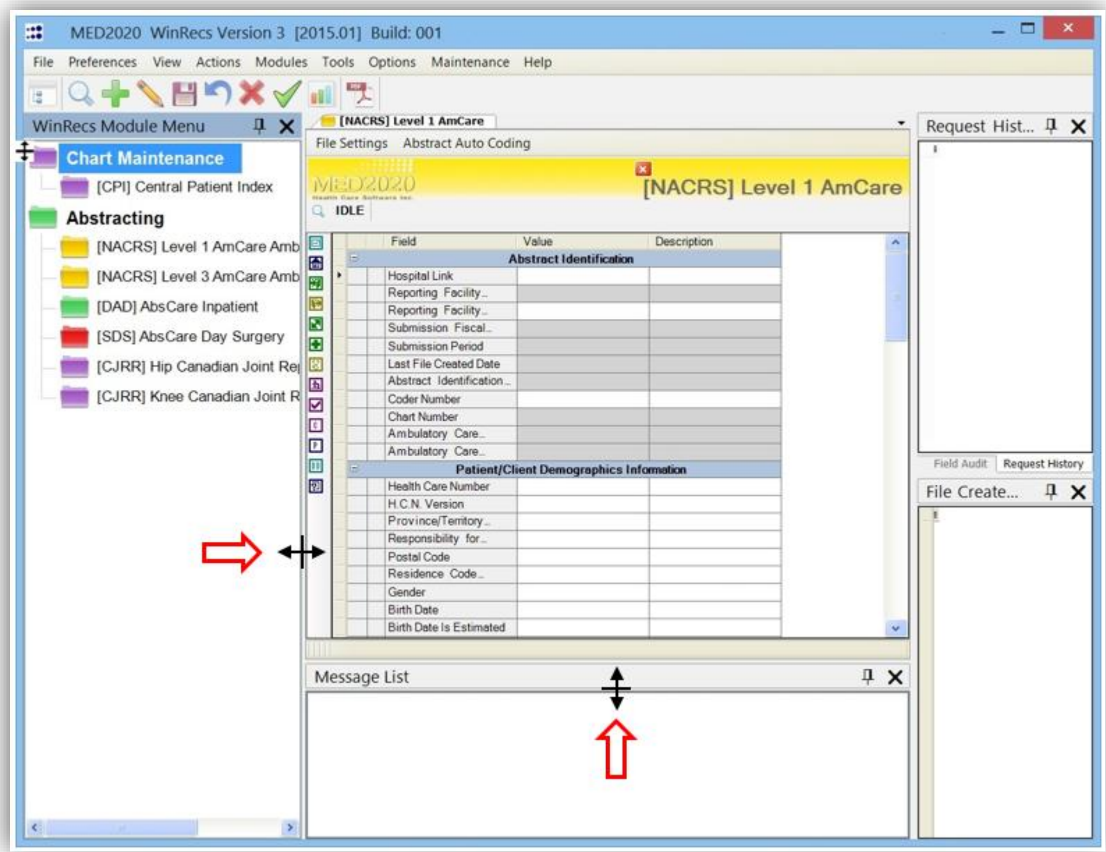


Figure 32 - Docked window cursors

- When the mouse pointer icon is displayed as an adjustment icon, click and drag the edge of the window.
- Release the mouse button when the window is the desired size.

Example of configuration

This configuration allows for a maximum number of fields to be displayed while still providing access to the messages and Record Information Elements. The WinRecs Module Menu can be viewed by clicking the side tab or pressing **[CTRL + M]** or **View → WinRecs Application Menu**.

The Visit History can also be consulted by clicking the side tab Visit History or by clicking **View → Visit History**.

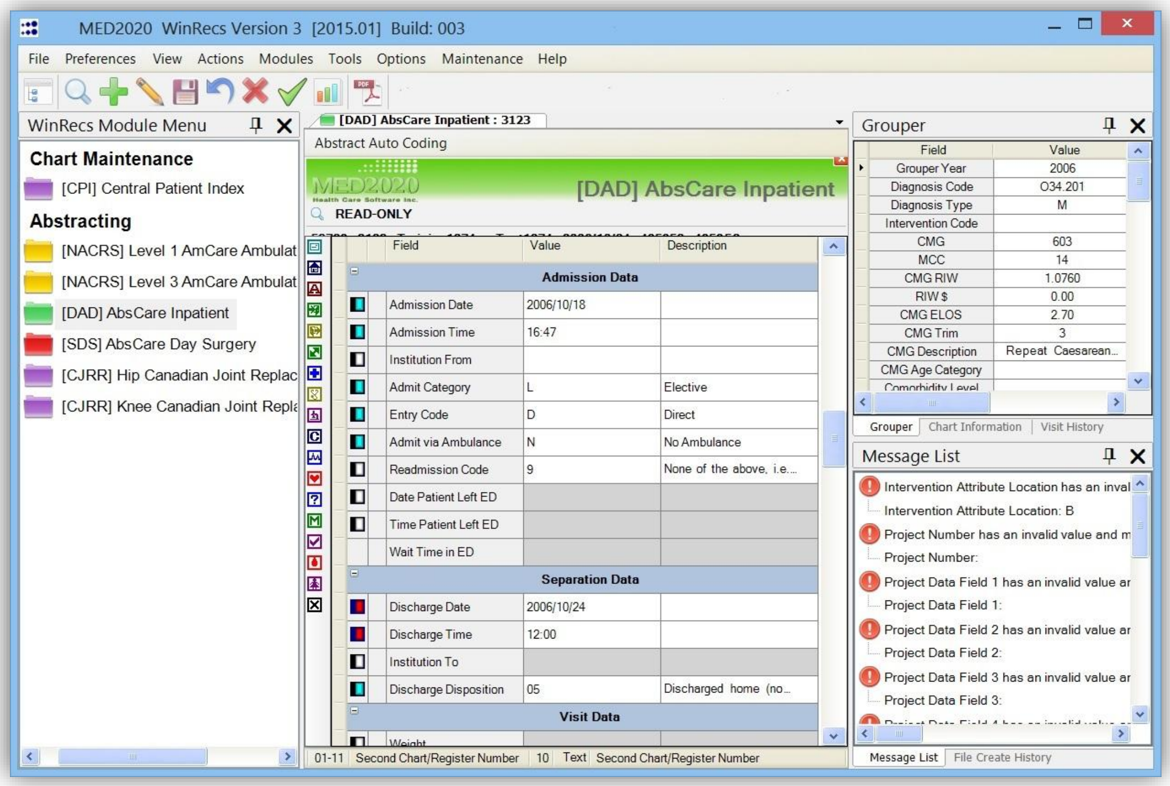


Figure 33 - Docking windows example

1.6 Grid Manipulation

Grids are used in a lot of different areas of the application. For example, the result of the search feature is displayed in a grid and Look Up values are also displayed in a grid. Grids can be manipulated in a variety of ways; columns can be sorted, moved or their width can be modified.

> **The main abstracting area can NOT be manipulated like grids;**
> **it can, however, be tailored via the Control File.**

Sorting

Most columns in grids can be sorted. When a column header is clicked the grid will be sorted based on the column clicked. A sorted column will display an icon indicating that it's sorted and the direction of the sort.

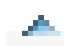
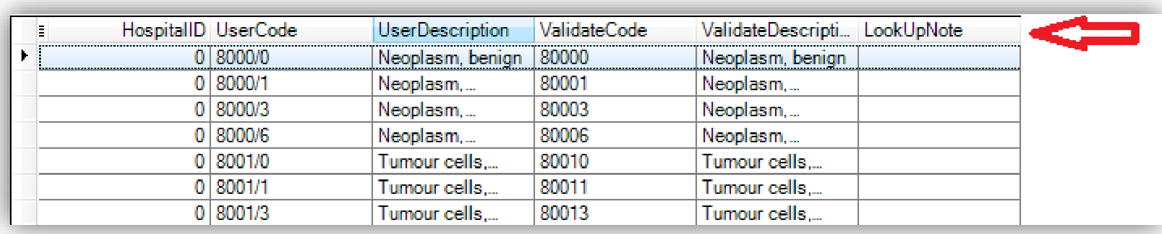
	This icon is displayed on the header of a column when it's sorted in ascending order.
	This icon is displayed on the header of a column when it's sorted in descending order.

Table 8 - Grid Manipulation Sorting Icons

To sort a grid

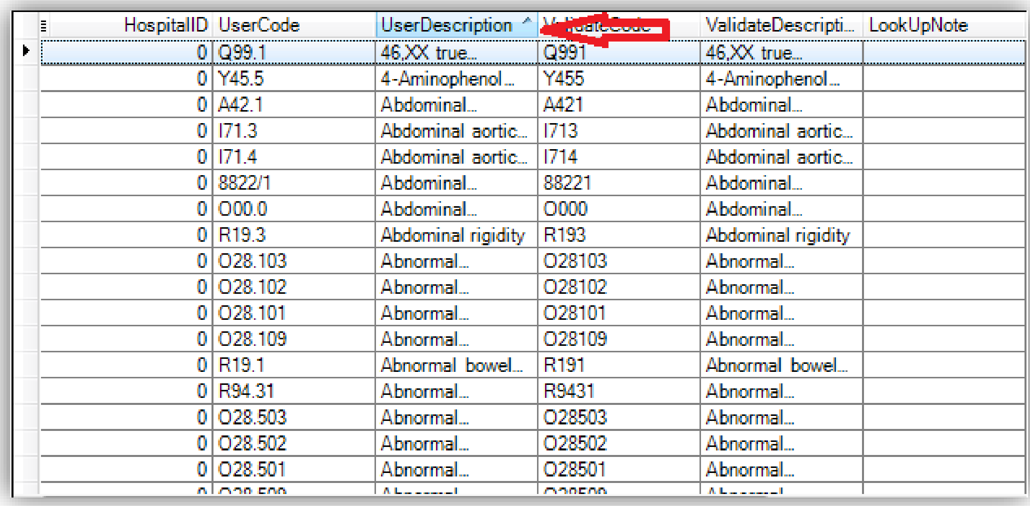
- Click on the column header



HospitalID	UserCode	UserDescription	ValidateCode	ValidateDescripti...	LookUpNote
0	8000/0	Neoplasm, benign	80000	Neoplasm, benign	
0	8000/1	Neoplasm,...	80001	Neoplasm,...	
0	8000/3	Neoplasm,...	80003	Neoplasm,...	
0	8000/6	Neoplasm,...	80006	Neoplasm,...	
0	8001/0	Tumour cells,...	80010	Tumour cells,...	
0	8001/1	Tumour cells,...	80011	Tumour cells,...	
0	8001/3	Tumour cells,...	80013	Tumour cells,...	

Figure 34 - Sorting a grid

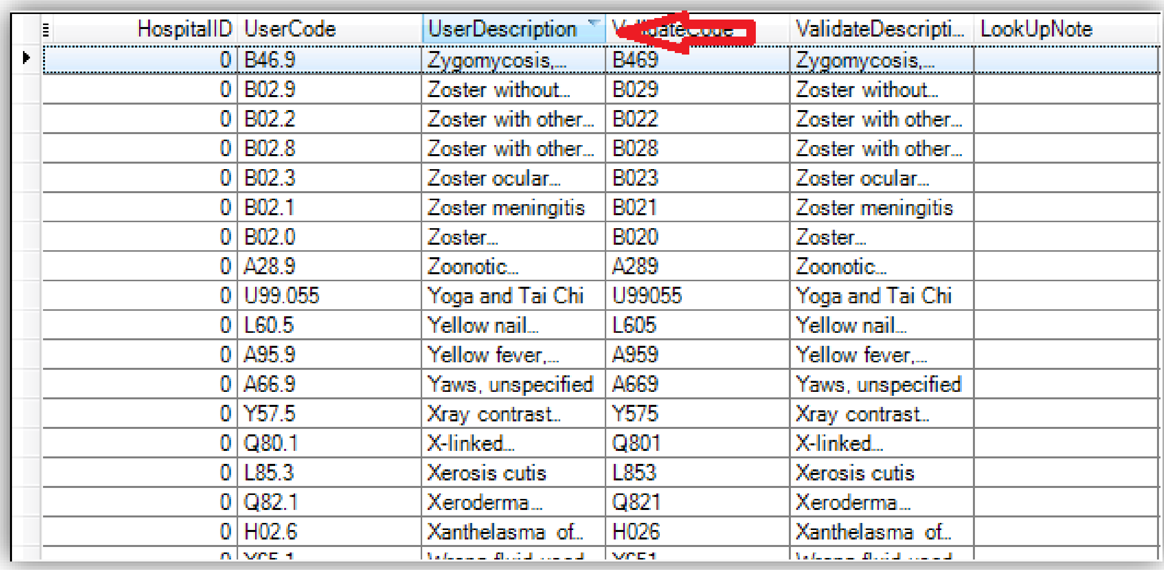
- Clicking the *UserDescription* column header will initially sort the grid in ascending order by user description.



HospitalID	UserCode	UserDescription	ValidateCode	ValidateDescripti...	LookUpNote
0	Q99.1	46,XX true...	Q991	46,XX true...	
0	Y45.5	4-Aminophenol...	Y455	4-Aminophenol...	
0	A42.1	Abdominal...	A421	Abdominal...	
0	I71.3	Abdominal aortic...	I713	Abdominal aortic...	
0	I71.4	Abdominal aortic...	I714	Abdominal aortic...	
0	8822/1	Abdominal...	88221	Abdominal...	
0	O00.0	Abdominal...	O000	Abdominal...	
0	R19.3	Abdominal rigidity	R193	Abdominal rigidity	
0	O28.103	Abnormal...	O28103	Abnormal...	
0	O28.102	Abnormal...	O28102	Abnormal...	
0	O28.101	Abnormal...	O28101	Abnormal...	
0	O28.109	Abnormal...	O28109	Abnormal...	
0	R19.1	Abnormal bowel...	R191	Abnormal bowel...	
0	R94.31	Abnormal...	R9431	Abnormal...	
0	O28.503	Abnormal...	O28503	Abnormal...	
0	O28.502	Abnormal...	O28502	Abnormal...	
0	O28.501	Abnormal...	O28501	Abnormal...	

Figure 35 - Grid sorted in ascending order

- Clicking the *UserDescription* column again will sort the grid in descending order by user description.



HospitalID	UserCode	UserDescription	ValidateCode	ValidateDescripti...	LookUpNote
0	B46.9	Zygomycosis,...	B469	Zygomycosis,...	
0	B02.9	Zoster without...	B029	Zoster without...	
0	B02.2	Zoster with other...	B022	Zoster with other...	
0	B02.8	Zoster with other...	B028	Zoster with other...	
0	B02.3	Zoster ocular...	B023	Zoster ocular...	
0	B02.1	Zoster meningitis	B021	Zoster meningitis	
0	B02.0	Zoster...	B020	Zoster...	
0	A28.9	Zoonotic...	A289	Zoonotic...	
0	U99.055	Yoga and Tai Chi	U99055	Yoga and Tai Chi	
0	L60.5	Yellow nail...	L605	Yellow nail...	
0	A95.9	Yellow fever,...	A959	Yellow fever,...	
0	A66.9	Yaws, unspecified	A669	Yaws, unspecified	
0	Y57.5	Xray contrast...	Y575	Xray contrast...	
0	Q80.1	X-linked...	Q801	X-linked...	
0	L85.3	Xerosis cutis	L853	Xerosis cutis	
0	Q82.1	Xeroderma...	Q821	Xeroderma...	
0	H02.6	Xanthelasma of...	H026	Xanthelasma of...	

Figure 36 - Grid sorted in descending order

- Clicking the *UserDescription* column again will return the grid to its original sort order.

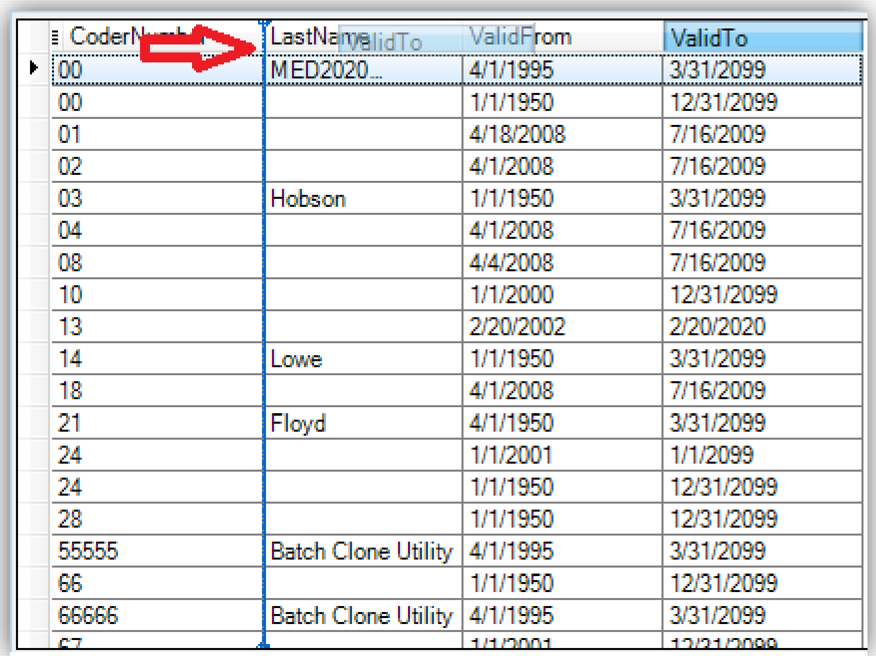
The sequence of sort is ascending, descending and original.

Moving columns

Most columns in the grid can be moved. This feature is particularly useful when you need to compare values from different columns and you need to view two columns side by side.

To move a column

- Click on a header and hold the mouse button down (to initiate the drag).
- Move your mouse pointer to the left or right.
- A blue marker line will appear between two (2) adjacent columns and this will be the new location of the column.
- Release the mouse button when the marker line is located at the desired position.



CoderN	LastName	ValidFrom	ValidTo
00	MED2020...	4/1/1995	3/31/2099
00		1/1/1950	12/31/2099
01		4/18/2008	7/16/2009
02		4/1/2008	7/16/2009
03	Hobson	1/1/1950	3/31/2099
04		4/1/2008	7/16/2009
08		4/4/2008	7/16/2009
10		1/1/2000	12/31/2099
13		2/20/2002	2/20/2020
14	Lowe	1/1/1950	3/31/2099
18		4/1/2008	7/16/2009
21	Floyd	4/1/1950	3/31/2099
24		1/1/2001	1/1/2099
24		1/1/1950	12/31/2099
28		1/1/1950	12/31/2099
55555	Batch Clone Utility	4/1/1995	3/31/2099
66		1/1/1950	12/31/2099
66666	Batch Clone Utility	4/1/1995	3/31/2099
67		1/1/2001	12/31/2099

Figure 37 - Grid column moved

In this example, the column *ValidTo* will be moved to the right of the *CoderNumber* column.

Increasing / Decreasing Column Width

On some occasions, the text displayed in a column is wider than the width of the column, preventing the user from viewing the complete data. In this case, the user can increase or decrease the width of the column.

To increase or decrease the width of a column

- Move the mouse pointer, slowly from over the grid header, until the mouse pointer changea to the column width adjustment cursor .
- Click and hold the mouse button.
- Move left or right; increasing the width of one column decreases the width of the neighbouring column.
- Release the button when satisfied with the new widths.

CoderNumber	LastName	ValidFrom	ValidTo
99	Admin	2/20/2002	12/31/2099
90		1/1/1950	12/31/2099
67		1/1/2001	12/31/2099
66		1/1/1950	12/31/2099
28		1/1/1950	12/31/2099
24		1/1/1950	12/31/2099
10		1/1/2000	12/31/2099
00		1/1/1950	12/31/2099
99999	Batch Interface	4/1/1995	3/31/2099
99	MED2020 Coder	4/1/1995	3/31/2099

Figure 38 - Grid column adjustment

1.7 Grid Orientation

Grids can be displayed vertically or horizontally; this feature is useful when changing the orientation of the window via the docking feature.

The Grids in the following windows can be toggled: `Grouper`, `Record Information Elements` and `Visit History`.

For example, in the figure below, the Grouper window is displayed while the grid is displayed horizontally, preventing the user from easily viewing all of the grouper information. This scenario will be used to describe the grid orientation feature.

Grid orientation example

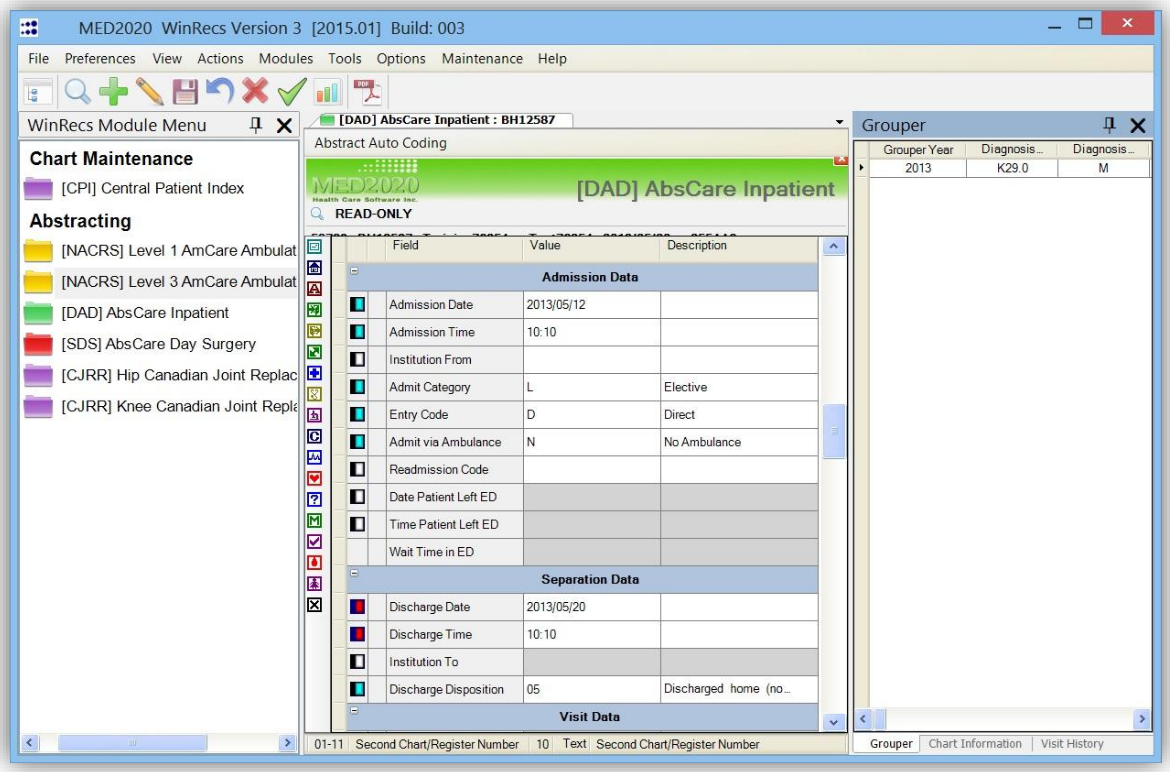


Figure 39 - Grid orientation example

To toggle the grid orientation

- Right click on any data on the grid- NOT the header - to display the context menu.

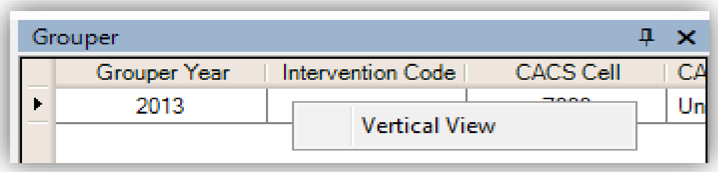


Figure 40 - Grid orientation context menu

- Click on the menu item.

> **A grid displayed horizontally will provide the Vertical View menu.**
>
> **A grid displayed vertically will provide the Horizontal View menu.**

Grid orientation after toggling the view to vertical

Using the vertical view for the Grouper window allows the user to view more information at once and to quickly scroll through the information.

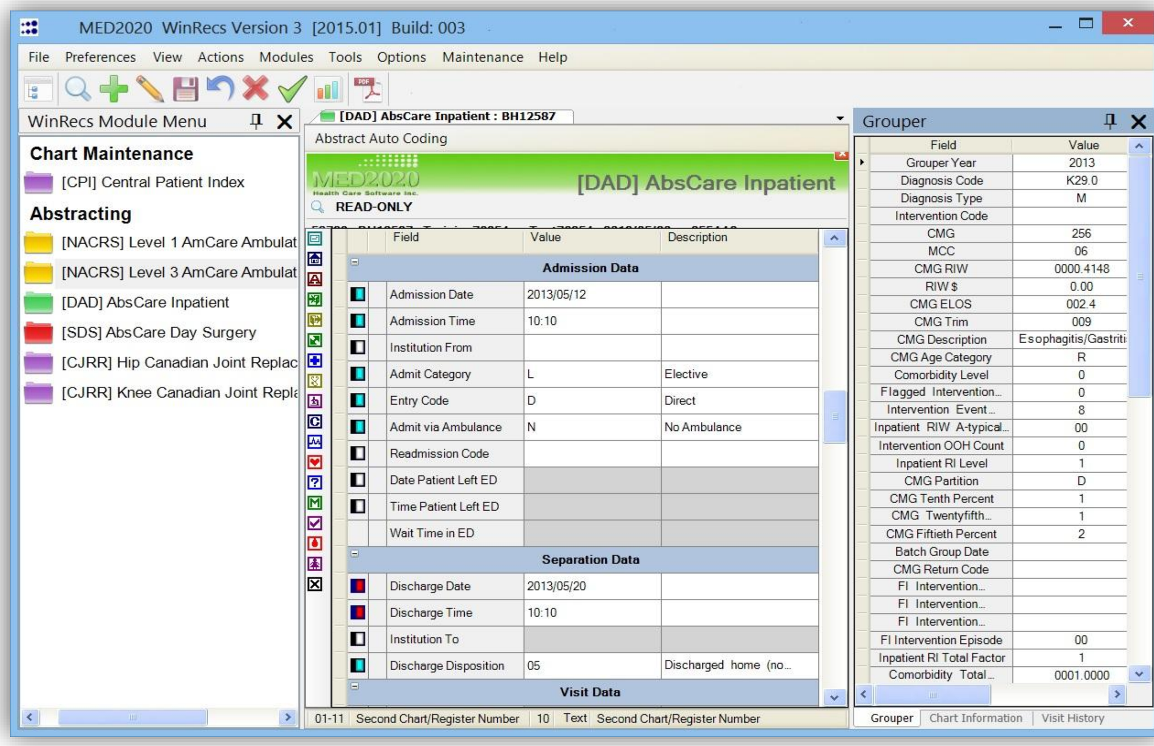


Figure 41 - Grid orientation after toggling the view to vertical

2. WinRecs Options Menu

The WinRecs Menu consists of the 5 features in the **Options Menu**: **`Regional Profile`**, **`Hospital Profile`**, **`Institution Profile`**, **`User Profile`**, and **`Control File`**.

2.1 Options Menu Use

The following will be the options that are the same for Regional Profile, Hospital Profile, Institution Profile & User Profile.

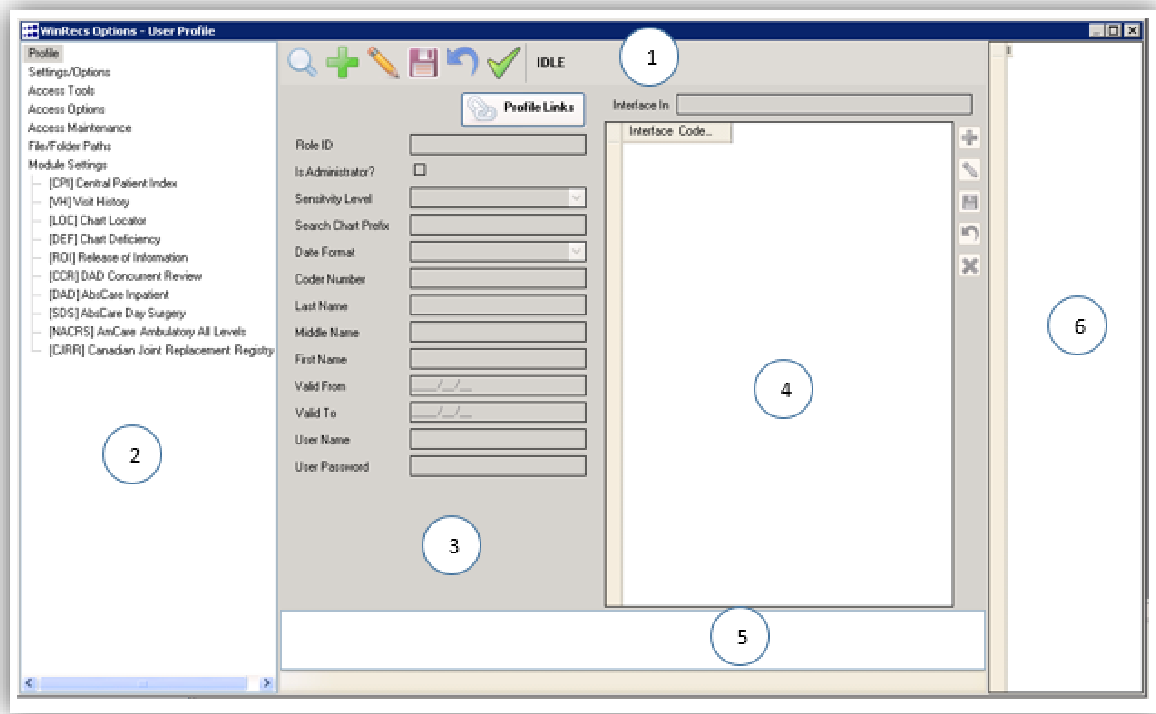


Figure 42 – Options Menu Layout

1. **Tool bar**

Icon	Description	Shortcut Keys
	Search for existing Institutions	**[F4]**
	Create a New Institution	**[F5]**
	Enables editing of the currently selected record.	**[F6]**
	Saves the current record if there are unsaved changes.	**[F7]**
	Undoes any changes and returns the record to the previous state since the last save.	**[F8]**
	Verifies the current record for any errors or warnings.	**[F11]**

Table 9 - User Profile Maintenance Toolbar

2. **Profile Options -** Clicking on any of these options gives the administrator the option to choose or not choose it.
3. **Field Panel -** Displays the field that can be modified for each of the options chosen.
4. **Interface Panel-** Provides the option to add the `Interface In` value for the **HL7** and **Batch Interface** fields**.**
5. **Mandatory Items –** The items that are mandatory will display
6. **Update History** – Displays the coder(s) who made changes in that field.

To edit the current record

- Click the on the toolbar.

  — or —

- Press **[F6].**

This will set the current record in edit mode, allowing the user to modify the values.

To save the current record

- Click the on the toolbar.

  — or —

- Press **[F7].**

This action will save the record and set it back to read only.

To undo the changes of the current record

- Click the on the toolbar.

  — or —

- Press **[F8].**

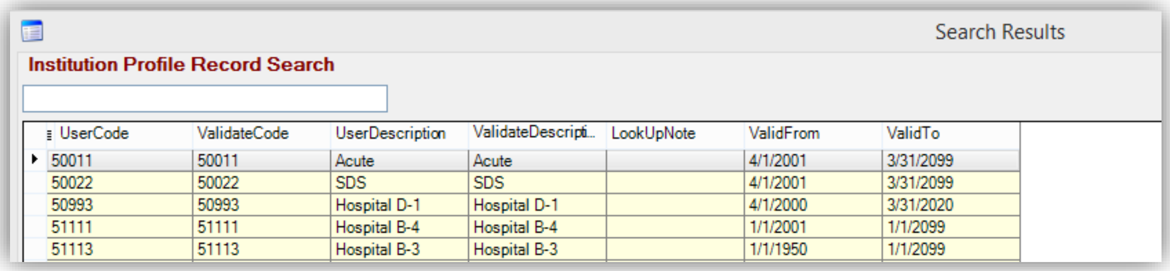
This action returns all modified values to their last saved state.

To access an existing entry

- Click the icon.

  — or —

- Press **[F4]**
- Double click on the Entry the user would like to view



UserCode	ValidateCode	UserDescription	ValidateDescripti...	LookUpNote	ValidFrom	ValidTo
50011	50011	Acute	Acute		4/1/2001	3/31/2099
50022	50022	SDS	SDS		4/1/2001	3/31/2099
50993	50993	Hospital D-1	Hospital D-1		4/1/2000	3/31/2020
51111	51111	Hospital B-4	Hospital B-4		1/1/2001	1/1/2099
51113	51113	Hospital B-3	Hospital B-3		1/1/1950	1/1/2099

Figure 43 – Accessing an existing entry

To create a New Entry

- Click the icon.

  — or —

- Press **[F5]**

2.2 Regional Profile and Hospital Profile

Regional Profile

The **Regional Profile** is used to specify default values to be inherited by the individual **Hospital Profiles.**

If a field is configured in the **Regional Profile,** it will be inherited by the **Hospital Profile** if the corresponding fields in the **Hospital Profile** are blank. If the **Hospital Profile** field is populated it will override the **Regional Profile** settings. Administrators can use this feature to manage multiple hospitals that use the same WinRecs database.

If a Regional solution is not being used, then the **Hospital Profile** will be used.

Hospital Profile

The **Hospital Profile** is used to specify default values for hospitals. The Hospital Profile contains the same fields as the Regional Profile.

To access the Regional Profile

- Select **Options → Regional Profile**.

To access the Hospital Profile

- Select **Options → Hospital Profile**.

WinRecs Options Regional Profile & Hospital Profile

Look Up Values

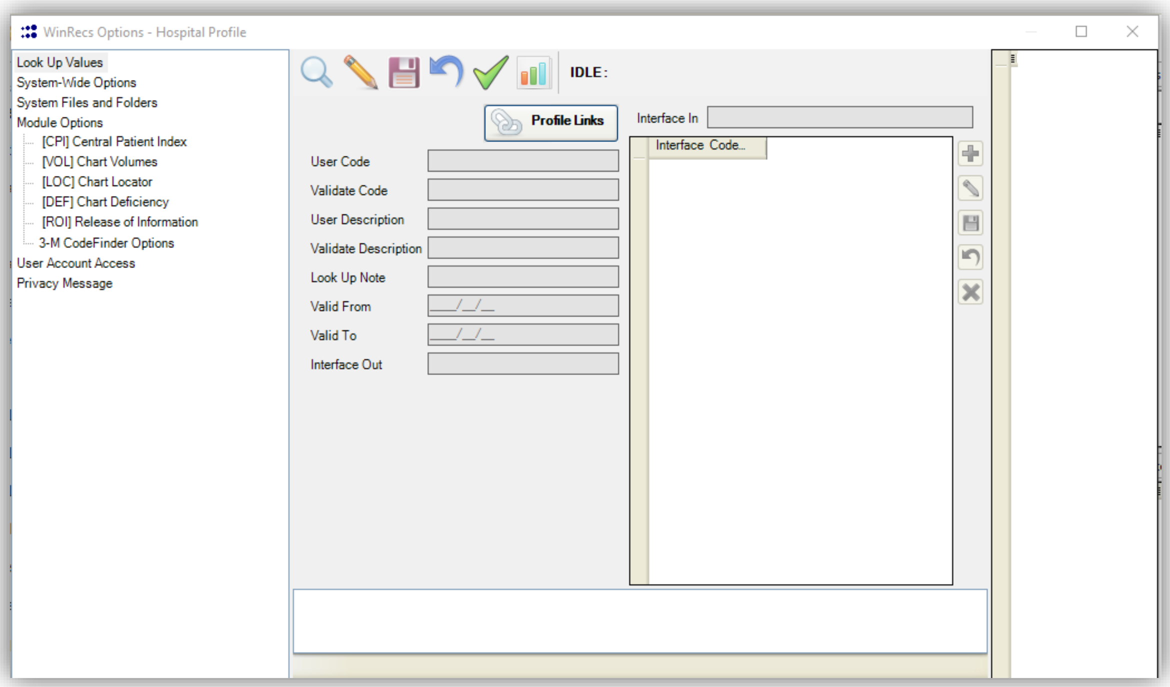
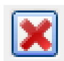


Figure 44 – Regional Profile/ Hospital Profile – Look Up Values Screen

- `Profile Links (Hospital Profile only) –` Gives the user the ability to link the hospital to a region if there is more than one region in the database.
- `User Code` – The code or number assigned to the Region or Hospital.
- `Validate Code` – This code will populate with the `User Code` (Once the record is saved this field cannot be changed)
- `User Description` – The description of the Region/Hospital (Once the record is saved this field cannot be changed)
- *`Validate Description`* – This will populate with the default description
- *`Look Up Note`* – Defines note text viewed when performing Look ups
- *`Valid From`* - The date the region/hospital is valid from
- *`Valid To`* – The date the region/hospital is valid to
- *`Interface Out`* – Value used as region/hospital in interface populating out of WinRecs, populates with User Code.
- *`Interface In`* – Value used as the region/hospital in Batch and HL7 Interfaces

  - To add a value press

- Add the `Interface In` value
  

- Press  to save the entry
-  to cancel the entry before saving
-  to delete the entry after it is saved
- used to edit an existing value

System-Wide Options

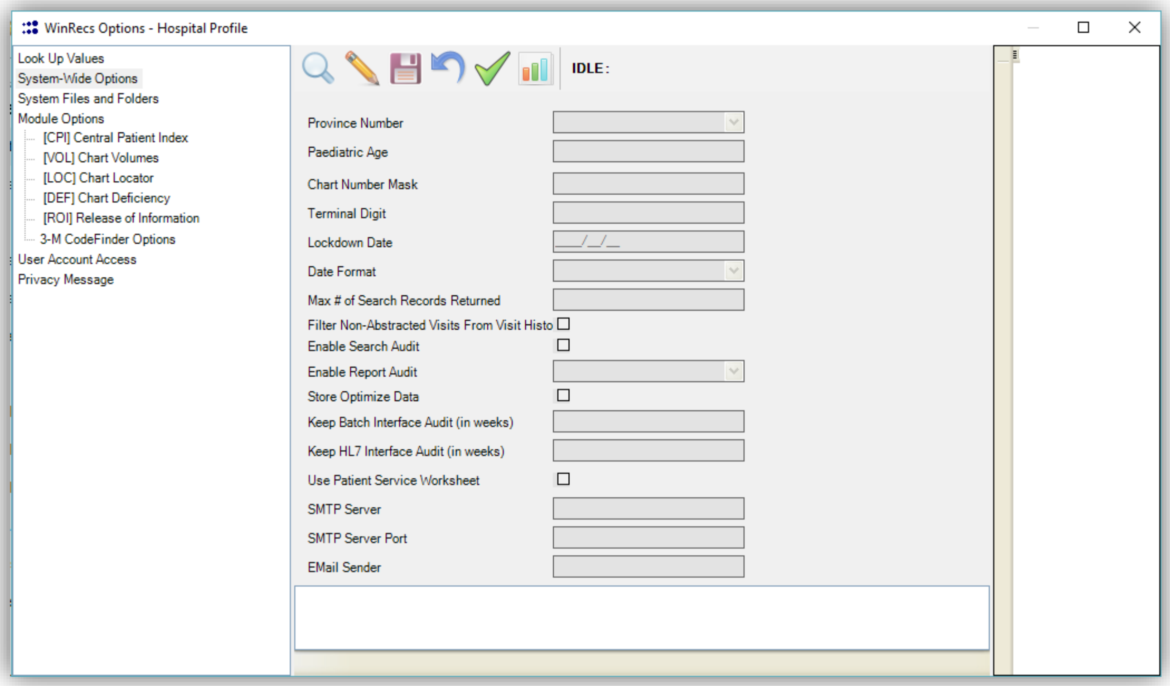


Figure 45 – Regional Profile/ Hospital Profile – System-Wide Option Screen

- `Province Number` – This is a drop down list of the provinces, choose the province the region or hospital belongs to
- `Paediatric Age` **-** Defines the Paediatric Age for Pediatric Services. The value may be defined by the specific institution or specified province and must be manually entered. For example: ‘*14’* defines `Paediatric Age` as patients 14 years old and under.
- `Chart Number Mask` - Defines how to view chart numbers on the system - without the leading zeros, or with characters between the characters. Examples*:* ########## (10 X #) will view a chart number without any leading zeros unless ‘0’ is part of the number. E.g. 309. *#####00000*, will view the chart number *00309*. #####00-000 will view the chart number *00-309*. #####000-00 will view the chart number *003-09*.
- `Terminal Digit` – Used to re-arrange the chart number in order to produce report sorted in a way that leads to randomized distribution. If this field is configured, the value must be 10 digits long using all digits between 0 and 9. Each number represents the new position of the corresponding chart number. For example:

Chart Number	Terminal Digit Mask	Terminal Digit Value
0000123456	*9012345678*	*5600001234*

- `Lockdown Date` - Defines the date records will be locked down and accessible in a 'View' mode only. For example, once all corrections are made for fiscal 2015 a lock down date of 2016/04/01 the users will have read-only access to all data prior to this date (system mandatory).
- `Date Format` – The date format the hospital or region would like displayed in WinRecs. The following options are:

- `Max # of Search Records to Return` – Defines the maximum number of records to return in a search
- `Filter Non-Abstracted Visits From Visit History` – Checking this will filter all non-abstracted visits from the Visit History, unchecking will keep all visits
- `Enable Search Audit` – When checked, a record of all searches plus all abstracts appearing in searches is stored in the database.
- `Enable Report Audit` – This is for the audit trail and has 3 levels:
    - N…None – Turn off Audit Report
    - B…who, what, when, where info of main and sub-reports – When a report is generated, the Audit Trail records the user running the report from WinRecs, records when the user logged on, when the report was run and the report path.
    - B…. Binary – (Basic plus binary image of main report)
- `Store Optimize Data` – When checked the optimized data will be stored on the database.
- `Keep Batch Interface Audit (in weeks)` – The date in weeks that Batch data will be kept anything after that date will be purged.
- `Keep HL7 Interface Audit (in weeks)` – The date in weeks that HL7 data will be kept anything after that date will be purged.
- `Use Patient Service Worksheet` – Enables the Transfer Worksheet in the [DAD] AbsCare Inpatient module
- `SMTP Server` – Enter the mail server address here
- `SMTP Server Port` – Enter the port if it is not a standard port
- `Email Sender` – The email that indicates where the email is coming from

System Files and Folders

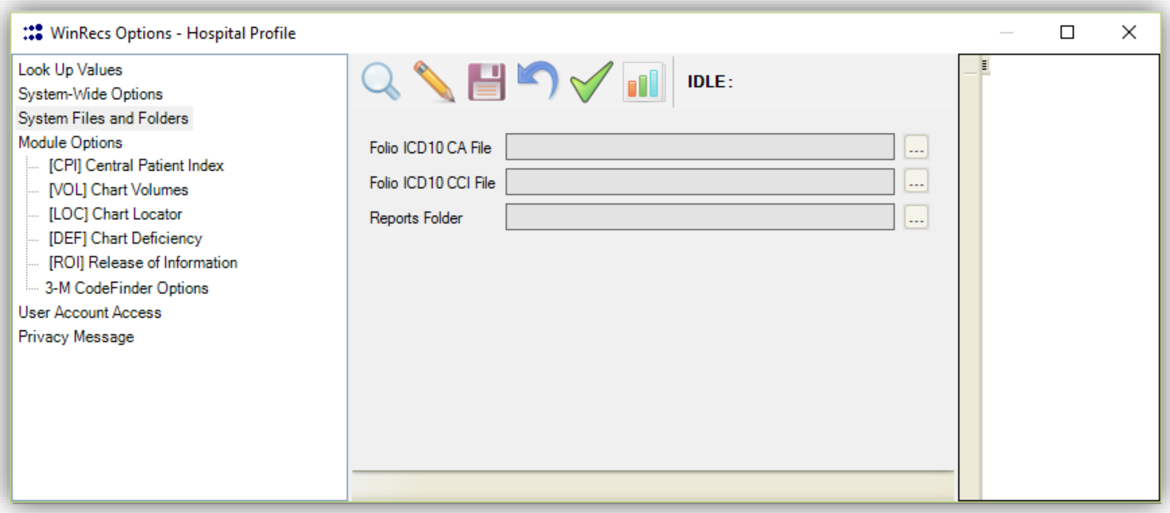


Figure 46– Regional Profile/ Hospital Profile – System Files and Folders

- `Folio ICD 10 CA File` – Pressing the will bring up the browser folder to find the ICD-10-CA Folio file
- `Folio ICD 10 CCI File` – Pressing the will bring up the browser folder to find the ICD-10-CCI Folio file
- `Reports Folder` – Pressing the will bring up the browser folder to find the Folder Reports are kept.

Module Options

[CPI] Central Patient Index

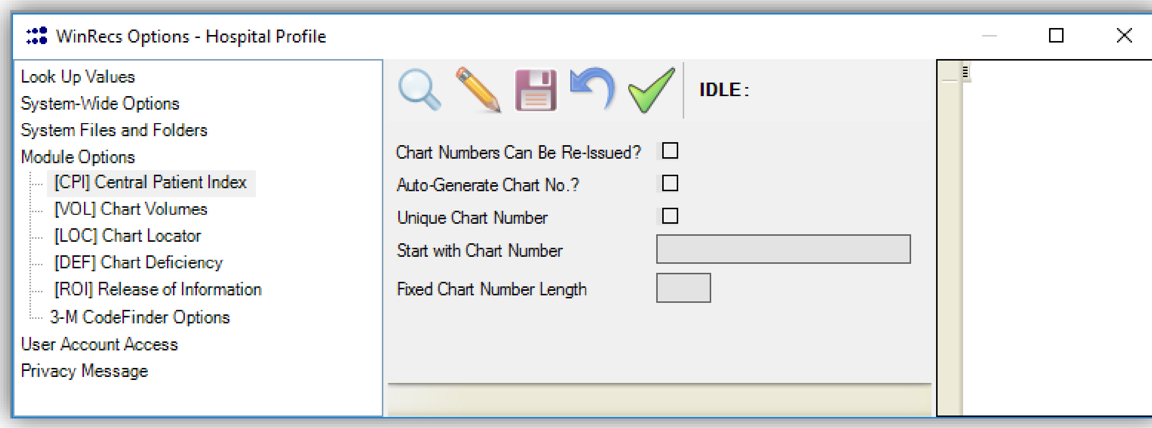


Figure 47 – Regional Profile/ Hospital Profile – Module Options/[CPI]Central Patient Index

- `Chart Numbers Can Be Re-Issued?` – Checking this will allow the Region or Hospital to re-issue chart numbers to be used again. Must be unchecked for the Un-Merge function to work.
- `Auto-Generate Chart No.?` – If checked WinRecs uses the `Start with Chart Number` field to assign new chart numbers.
- `Unique Chart Number` – Used for regional set up to display the unique number shared among the different hospitals.
- `Start with Chart Number` – This defines the starting point for chart number assignment. The `Start with Chart Number` field will automatically increment as the number are used. For example, the value 123 is entered, the next patient chart created that does not have a records will be assigned chart number 124. If attempting to create a new chart number using a number other than the number outlined in the `Start with Chart Number` field, the program will try to assign the `Start with Chart Number` value. Going back to the `Chart Number` field in the **CPI** before proceeding will ensure the chart number value is the appropriate one.
- `Fixed Chart Length` – This field saves a zero filled version of the chart number to the database where the chart number is always the same length. The value is pulled from the CPI and is saved with the chart not the visit. Can be left blank.

[VOL] Chart Volumes

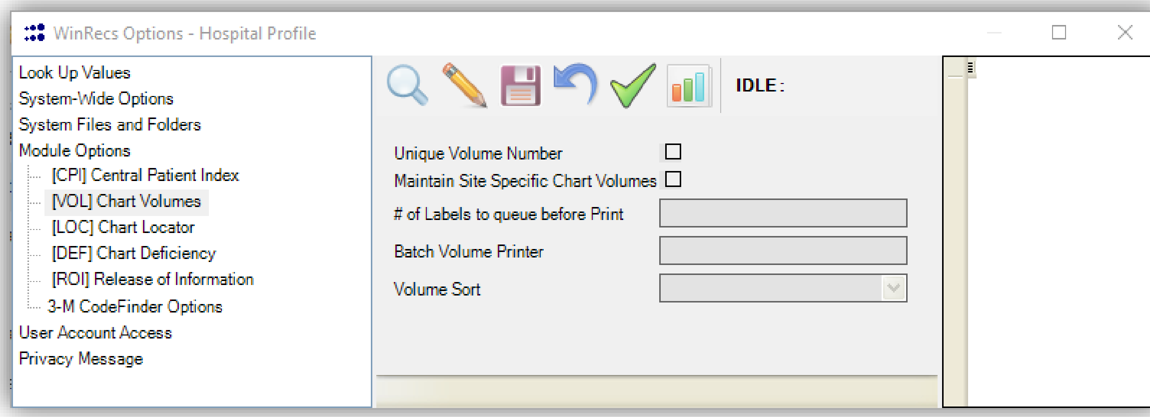
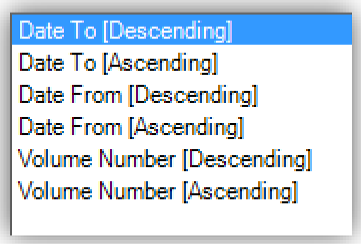
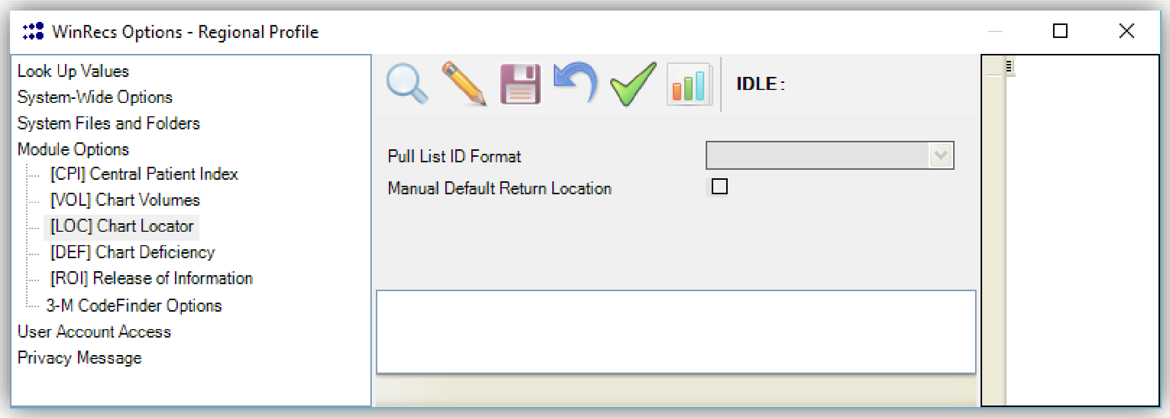


Figure 48 – Regional Profile/ Hospital Profile – Module Options/[VOL]Chart Volumes

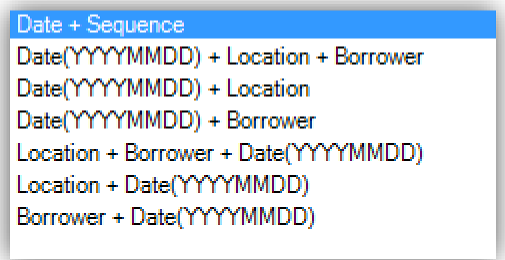
- `Unique Volume Number` – A check mark indicates that all volume numbers must be unique.
- `Maintain Site Specific Chart Volumes` – A check mark indicates that all chart volumes will be site specific.
- `# of Labels to queue before Print` – Users who interface chart volumes can define the number of labels to print.
- `Batch Volume Printer` – The path the labels are to print. For example: \\medcorp2\SHARP_Copier
- `Volume Sort` – The ability to sort how the volumes appear in the Chart Volumes module:



[LOC] Chart Locator



- `Pull List ID Format` – Gives the site ability to sort the Pull List by:



- `Manual Default Return Location` – When the box is checked and the Transaction Type is ‘R’, users are prompted to select the Return Location and more than one chart can be returned to that location. When the box is unchecked, when the Transaction Type is ‘R’, it must be entered for each chart being returned.

[DEF] Chart Deficiency

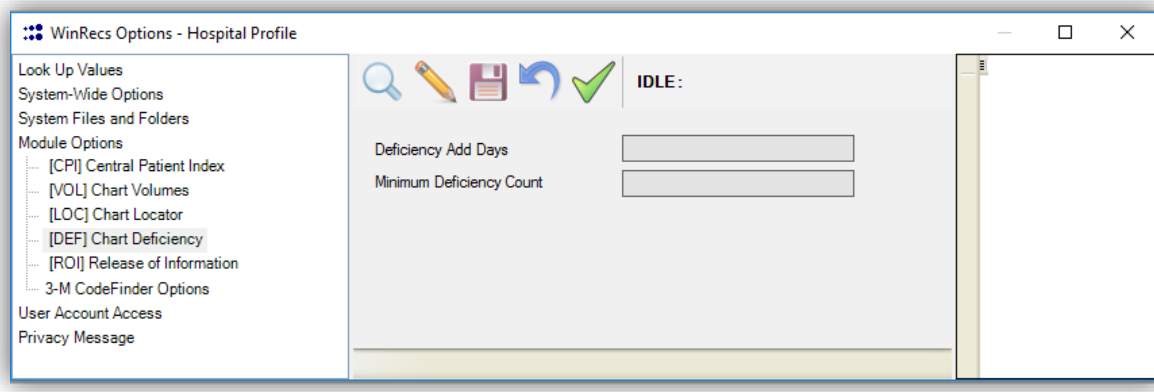


Figure 49 – Regional Profile/ Hospital Profile – Module Options/ [DEF]Chart Deficiency

- `Deficiency Add Days` – This indicates when to start counting the day that the chart is deficient. If the user does not want to count the day the deficiency is put in the Provider’s chart completion area, enter “1” in this field and the count will begin one day after the deficiency is entered.
- `Minimum Deficiency Count` – The minimum number of deficiencies for a letter to be generated.

[ROI] Release of Information (See ROI documentation)

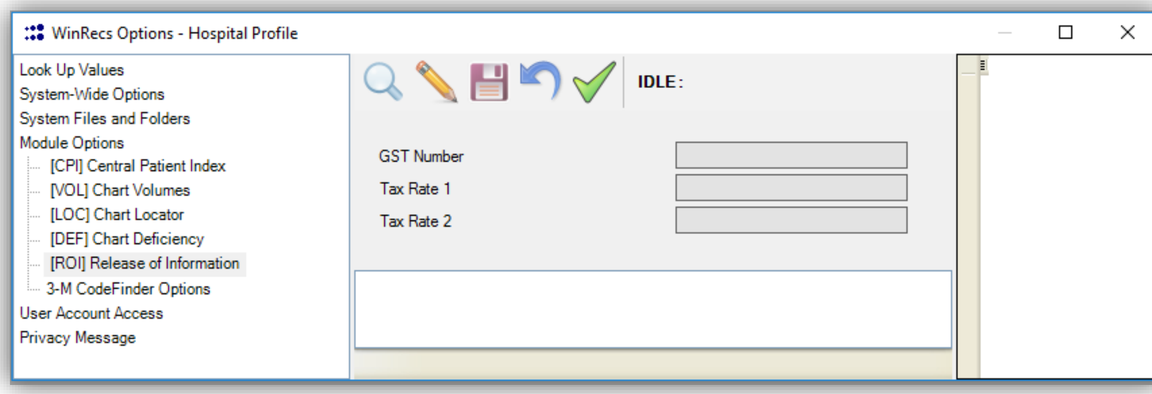


Figure 50 – Regional Profile/ Hospital Profile – Module Options/ [ROI] Release of Information

- `GST Number` – This number is used for billing purposes in the ROI module.
- `Tax Rate 1` – Used to enter the GST or PST for the ROI module
- `Tax Rate 2` – Used to enter the GST or PST for the ROI module

3-M CodeFinder Options – used to configure 3M Bridge – Contact MED2020 for further instructions.

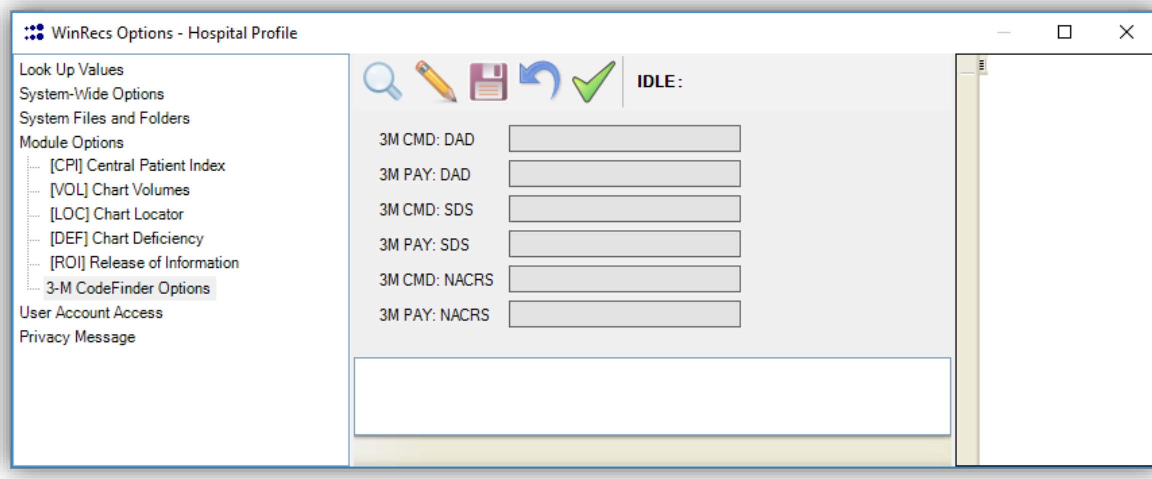


Figure 51 – Regional Profile/ Hospital Profile – Module Options/ 3-M CodeFinder Options

- `3M CMD: DAD` – Used to configure 3M Bridge – Contact MED2020 regarding this field
- `3M PAY: DAD` – Used to configure 3M Bridge – Contact MED2020 regarding this field
- `3M CMD: SDS` – Used to configure 3M Bridge – Contact MED2020 regarding this field
- `3M PAY: SDS` – Used to configure 3M Bridge – Contact MED2020 regarding this field
- `3M CMD: NACRS` – Used to configure 3M Bridge – Contact MED2020 regarding this field
- `3M PAY: NACRS` – Used to configure 3M Bridge – Contact MED2020 regarding this field

User Account Access

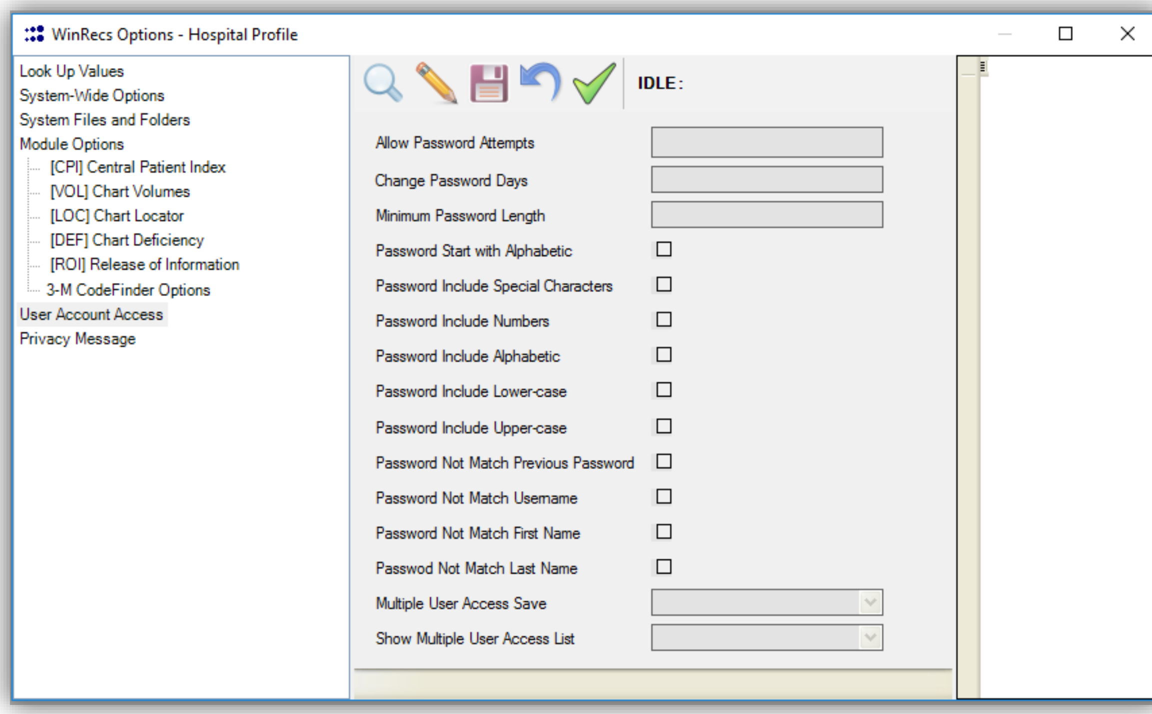


Figure 52 – Regional Profile/ Hospital Profile – Module Options/ User Account Access

- `Allow Password Attempts` – Enter the number of times a user can attempt to log in to WinRecs
- `Change Password Days` – Enter the number of days till a user must change a password
- `Minimum Password Length` – Enter a number for the minimum length the password must be.
- `Password Start with Alphabetic` – If checked the password must start with a letter
- `Password Include Special Characters` – If checked the password must include special characters
- `Password Include Lower-case` – If checked the password must include lower case letters
- `Password Include Upper-case` – If checked the password must include upper case letters
- `Password Not Match Previous Password` – If checked the password must not match the previous password
- `Password Not Match Username` – If checked the password must not match the WinRecs *Username* field
- `Password Not Match First Name` - If checked the password must not match the *First Name* field

- `Password Not Match Last Name` – If checked the password must not match the *Last Name* field
- `Multiple User Access Save` – **Yes** - will allow a user to save a record already accessed by another user. **No** – able to open the record access by another user but unable to save, the chart will be Read-Only.
- `Show Multiple User Access List` – **Yes** - will allow a user to see the list of users accessing the record, **No** – user will not see the list of users accessing the record.

Privacy Message

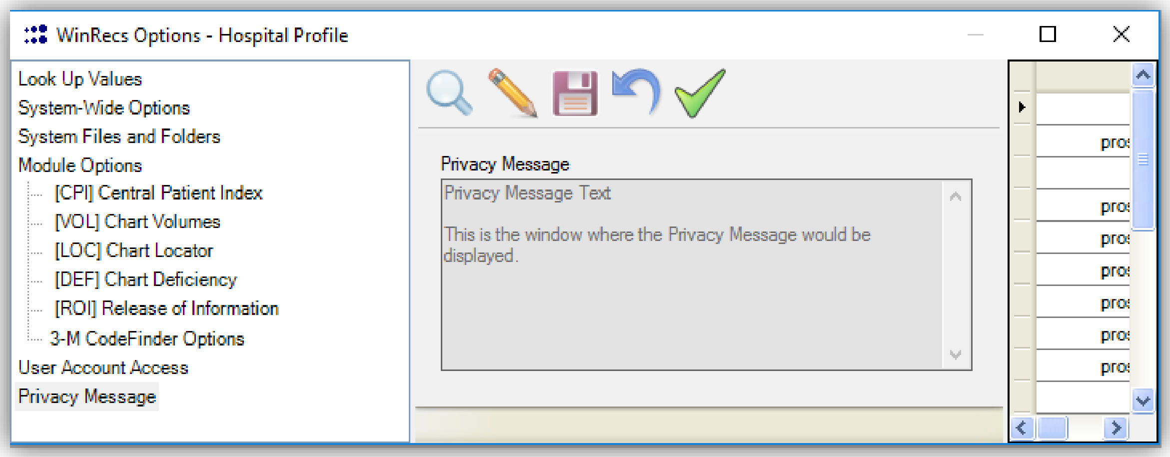


Figure 53 – Regional Profile/ Hospital Profile – Privacy Message

- Privacy Message - Enter text to be displayed or leave blank so no message is displayed
  - Press the Edit  or **[F6]**and type in message
  - Press the Save or **[F7]** to save
  - Press the Undo  or **[F8]** to undo any changes made since last saved.

2.3 Institution Profile

The Institution Profile is where institution specific information is entered. More than one institution profile can be defined per hospital profile.

To access the Institution Profile

- Select **Options** → **Institution Profile**.

WinRecs Options - Institution Profile

Look Up

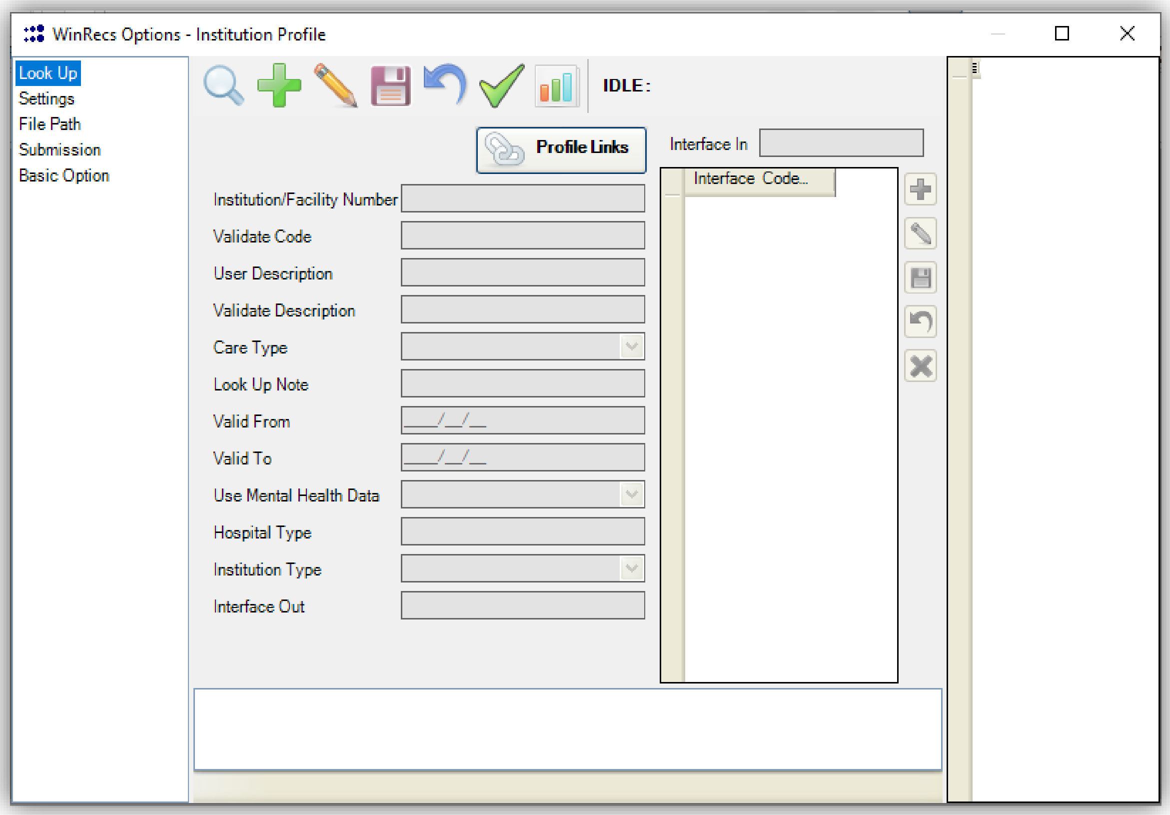
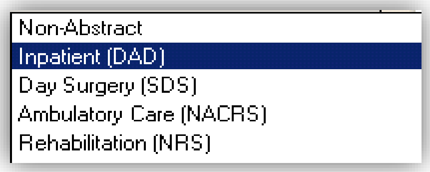


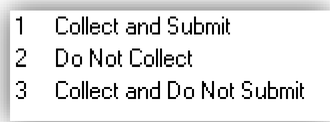
Figure 54 – Institution Profile– Look Up Screen

- `Profile Links–` The ability to link an institution to a region if there is more than one region in the database or to a specific hospital if there is more than one hospital
- `Institution/Facility Number` – The Institution number
- `Validate Code` – This number populates from the Institution/Facility Number (cannot change after saved)
- *`User Description`* –The description of the Institution
- *`Validate Description`* – Populates from the *User Description* (cannot change after saved)

- *`Care Type`* – Describes the type of Institution the facility is:

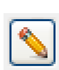


- `Look Up Note` – Defines note used in **[F2]** lookup
- `Valid From` – The date the Institution is valid from
- `Valid To` - The date the Institution is valid to
- `Uses Mental Health Data` – Determines at what level the Institution is collecting Mental Health Data:



- `Hospital Type` – The type of Hospital
- `Institution Type` – The type of Institution
- `Interface Out` – Value used as region/hospital in interface populating out of WinRecs, populates with User Code.
- *`Interface In`* – Value used as the region/hospital in Batch and HL7 Interfaces
  -  To add a value press
  - Add the *`Interface In`* value

  - Press  to save the entry
  -  to cancel the entry before saving
  -  to delete the entry after it is saved
  -  used to edit an existing value

Settings

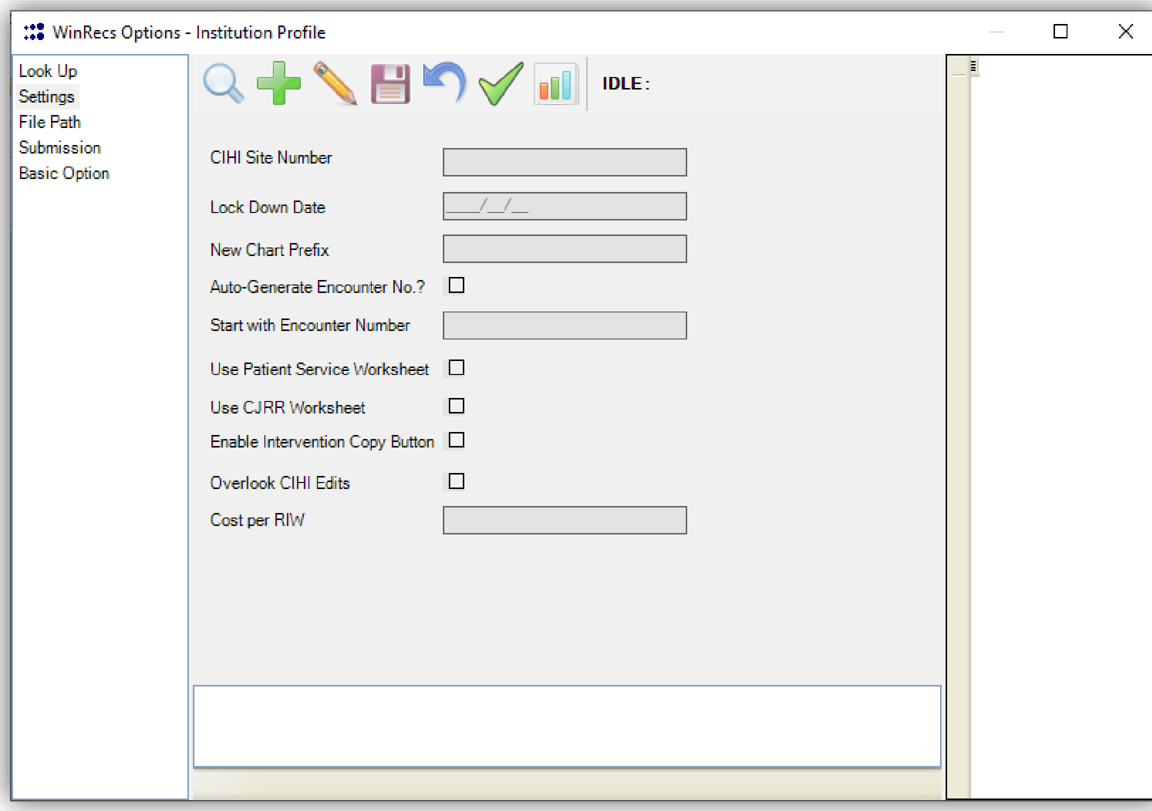


Figure 55 – Institution Profile– Settings Screen

- `CIHI Site Number` – distinguishes multiple sites of the same care type within a facility
- `Lock Down Date` – Defines the date records will be locked down and accessible in a 'View' mode only. For example, once all corrections are made for fiscal 2015 a lock down date of 2015/04/01 to have read-only access to all data prior to this date (system mandatory as shown on bottom of page). **Please note: If you enter the date in `Institution Profile` it will override the Lock Down Date in the `Hospital` and/or `Regional Profile`.**
- `New Chart Prefix` – Defines the alpha prefix used when creating a new chart. It can be used to limit user access as defined in User Profile.
- `Auto-Generate Encounter No?` – Checking this box will have WinRecs automatically generate encounter numbers.
- `Start with Encounter Number` – The starting number for the '`Auto-Generate Encounter No?`' field and WinRecs will automatically increment as the numbers are used. If you try to create a new `Encounter Number` other than what is outlined in the '`Start with Encounter Number`' field, WinRecs will still try to assign the value.

- `Use Patient Service Worksheet` – Enables the Transfer Worksheet in the [DAD] AbsCare Inpatient module.
- `Use CJRR Worksheet` – Enables the CJRR worksheet in order to capture CJRR records in the Institution chosen (DAD or NACRS)
- `Enable Intervention Copy Button` – Enables the Intervention Copy button found in the Intervention multiform in AbsCare Inpatient and NACRS modules.
- `Overlook CIHI Edits` – Checking this box will allow the Institution to overlook the CIHI edits when abstracting. Please contact CIHI if using this option.
- `Costs per RIW` – The institution's cost per resources intensity weight.

File Path

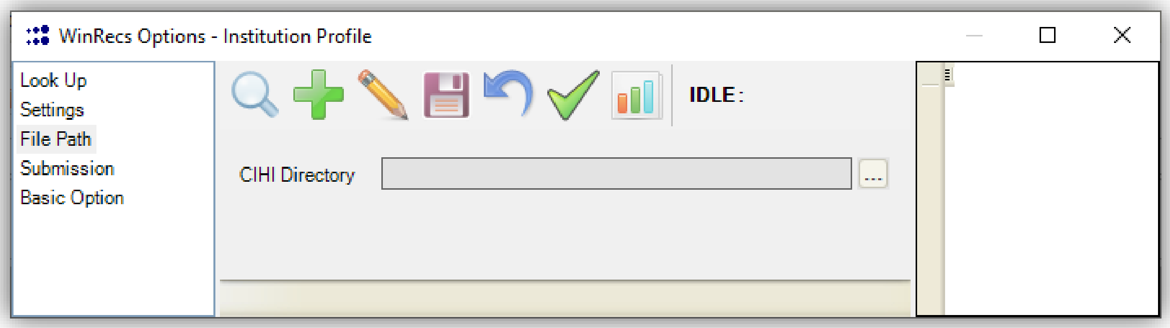


Figure 56 - Institution Profile – File Path

- `CIHI Directory` – Defines the path for the CIHI Submission and CIHI Correction files.

  Press the  and then select the path where the submission files are stored. Select the folder and click OK. If this is left blank, the files and folders will default to the C:WR3 on the PC the user is on when running the files.

Submission

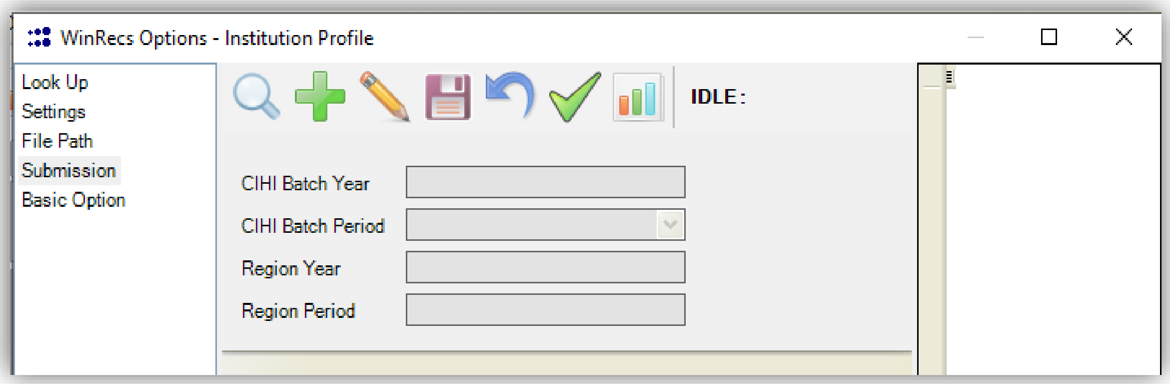


Figure 57 – Institution Profile – Submission Screen

- `CIHI Batch Year` – Can enter the current Batch Year for the institution
- `CIHI Batch Period` – Can enter the current Batch Period for the institution
- `Region Year` – Can enter the current Batch Year for the Region (if using)
- `Region Period` – Can enter the current Batch Period for the Region (if using)

Basic Options

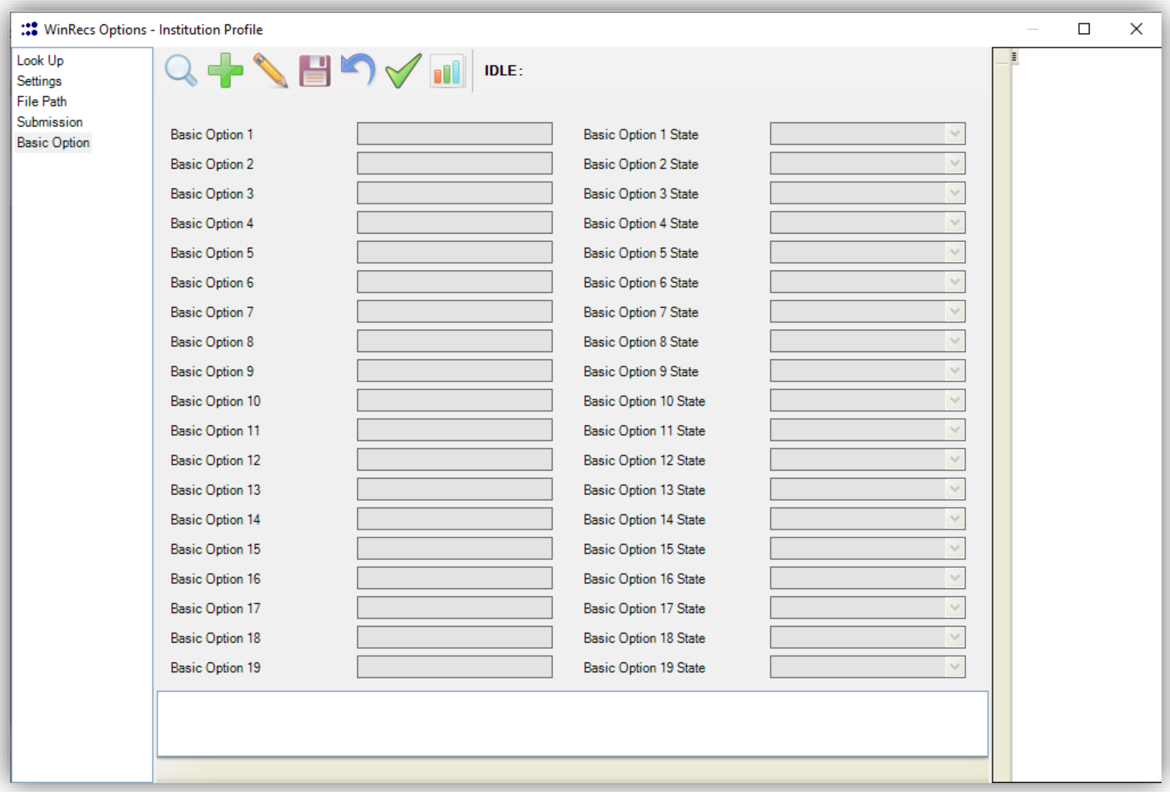
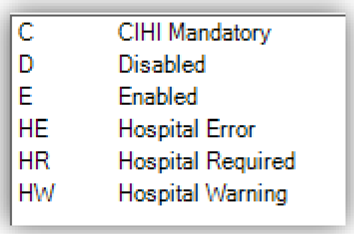


Figure 58 – Institution Profile – Submission Screen

Entering a Basic Option:

1. Press the  or **[F4]** and select the institution from the Institution look up
2. Press the  or **[F6]** to edit the Institution
3. Press the Basic Option tab on the left-hand side

- `Basic Option 1 - 19` – Enter the name of the Basic Option in the desired Basic Option
- `Basic Option (1-19) State` – Click on Drop Down Menu to choose the State



- `CIHI Mandatory` – Choose this if the Basic Option is mandated by CIHI and needs to be submitted
- `Disabled` **– Choose this option to no longer collect the Basic Option**
- `Enabled` – Choose this option to collect the Basic Option with no errors or warnings
- `Hospital Error` – Choose this option to display an error if it is left blank
- `Hospital Required` – Choose this option to not be able to save a record if it is left blank
- `Hospital Warning` – Choose this option to display a warning if it is left blank

Basic Option Look Up Values

1. To add look up values for Basic Options go to **Maintenance/ Look Up Code Maintenance**
2. On the left hand side go to Abstracting and choose the module the Basic Option is in
3. Click on the Basic Option Box (1-19) – choose the corresponding number you entered in Institution Profile.

- Press  or **[F5]** to create a new entry.
- `Institution Number` – will link to the Inst number the Basic option is located
- `User Display Code` – the display code to be displayed in the abstract
- `Validation Code` – will automatically populate the User Display Code, cannot change after saved
- `User Description` – the description of the display code
- `Default Description` – will default the user description, cannot change after saved
- `Look Up Note` – enter any notes (optional)
- `Valid From` – this will correspond with the discharge date or registration visit date and the value will start displaying at this time
- `Valid To` – the date the value to stop being used
- `Interface Out` – an optional field if the user would like the value to used in a Batch Out
- `Interface In` – enter the interface in value if bringing in a value from the interface.
- Press  or **[F7]** to save the record.

2.4 User Profile

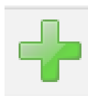
Any user wanting to access WinRecs must have a unique **User Profile** created. The User Profile controls the access level to modules and assigning user ID and passwords.

The profile is used to log entries and to track modifications to WinRecs patients and system records.

To access the user profile

- Select **Options → User Profile**.

To create a new user

- Press the 

  — or —

- Press **[F5].**
- A Search Results window will pop up with existing users

- Choose the user or Role ID you would like to base the User Profile by highlighting and double click or press 'Select Record'

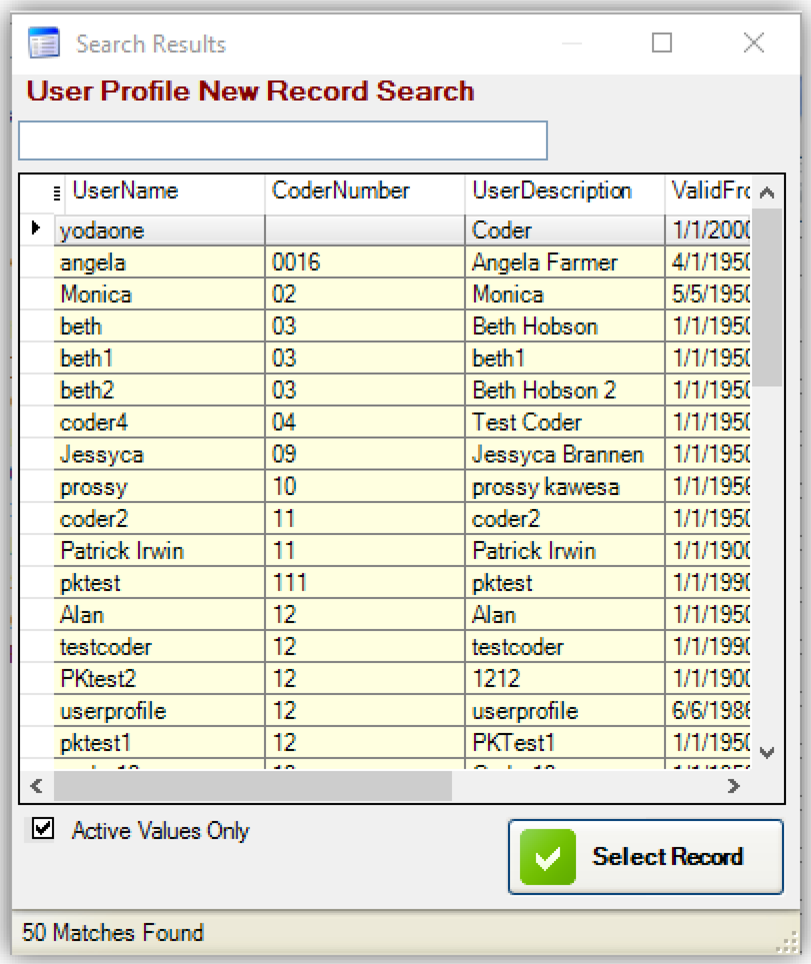


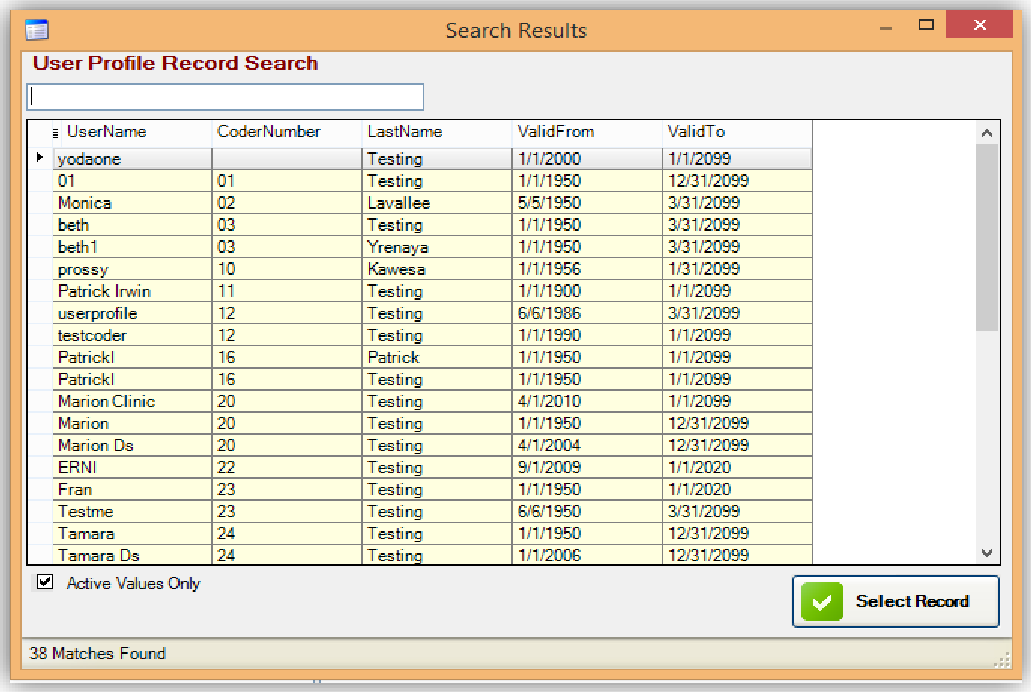
Figure 59 – Institution Profile – Submission Screen

- Enter the required fields

To search the user profile

- Press **[F4]** or click on the  icon.

The search screen opens to allow for a search of a user.



UserName	CoderNumber	LastName	ValidFrom	ValidTo
yodaone		Testing	1/1/2000	1/1/2099
01	01	Testing	1/1/1950	12/31/2099
Monica	02	Lavallee	5/5/1950	3/31/2099
beth	03	Testing	1/1/1950	3/31/2099
beth1	03	Yrenaya	1/1/1950	3/31/2099
prossy	10	Kawesa	1/1/1956	1/31/2099
Patrick Irwin	11	Testing	1/1/1900	1/1/2099
userprofile	12	Testing	6/6/1986	3/31/2099
testcoder	12	Testing	1/1/1990	1/1/2099
PatrickI	16	Patrick	1/1/1950	1/1/2099
PatrickI	16	Testing	1/1/1950	1/1/2099
Marion Clinic	20	Testing	4/1/2010	1/1/2099
Marion	20	Testing	1/1/1950	12/31/2099
Marion Ds	20	Testing	4/1/2004	12/31/2099
ERNI	22	Testing	9/1/2009	1/1/2020
Fran	23	Testing	1/1/1950	1/1/2020
Testme	23	Testing	6/6/1950	3/31/2099
Tamara	24	Testing	1/1/1950	12/31/2099
Tamara Ds	24	Testing	1/1/2006	12/31/2099

Figure 60 – User Profile Search Screen

- Enter a user name or coder number in the **User Profile Record Search** box. If there is only one match, the record will open in the **User Profile** window for editing. If there is more than one match, the matching records will be presented in the **Search Results** window.
- In the example below, the user has entered the search "*me*". WinRecs has returned two matching user profiles. A User profile is selected by double-clicking on it, which opens it in the User Profile window for editing.

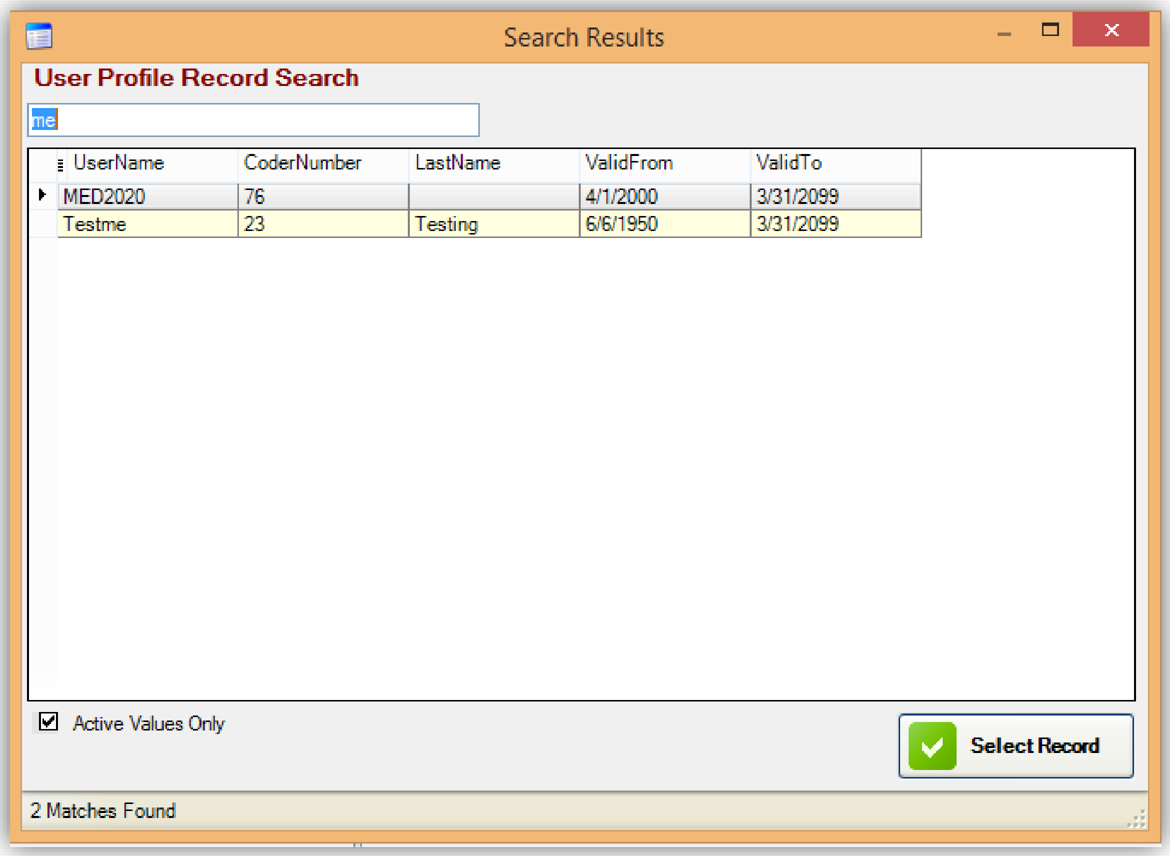


Figure 61 – User Profile Record Search

Role ID

Links users to a common profile/template. When a user is linked to a **Role ID**, all User Profile and Control File settings will be identical to those of the **Role ID User Profile** it is linked to. This feature is used to maintain groups of users. If a change is made in the Role ID user profile, all users linked to the Role ID will have the same change.

To use the Role ID:

- Use the [F4] function key or to call up the search window, choose the user you would like to assign the Role ID
- In the Role ID field, press **[F2]** to select the user to be used as the Role ID

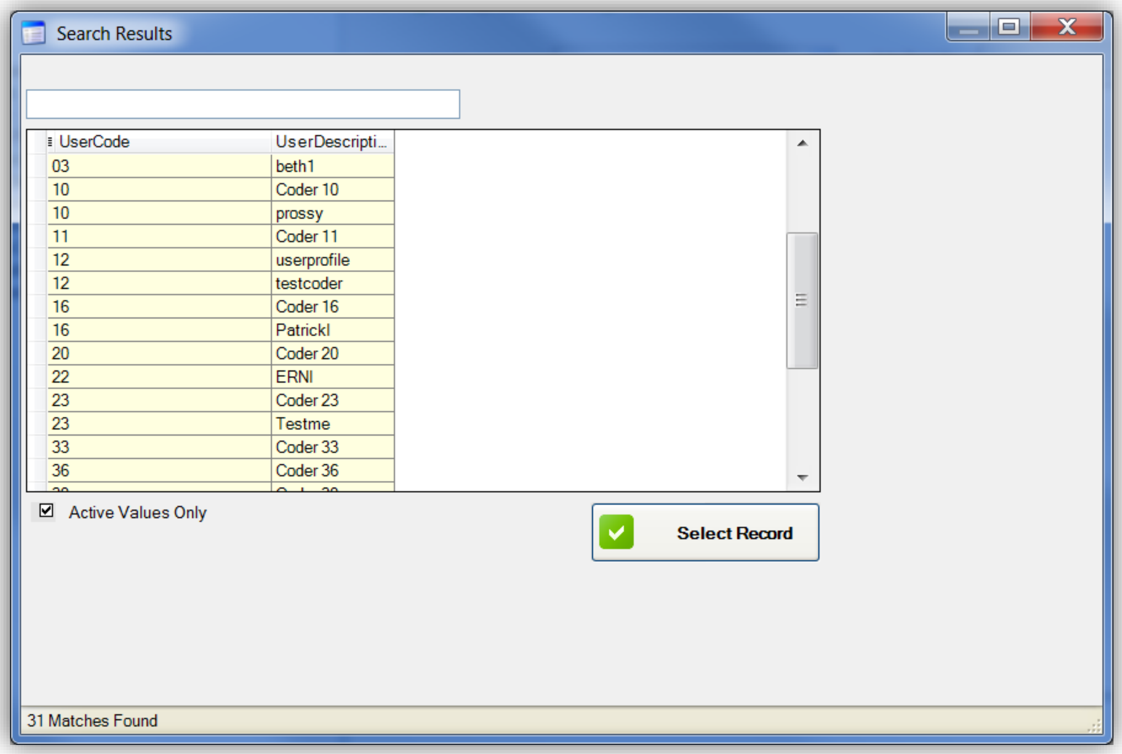


Figure 62 – User Profile Role ID Search

- Save the user profile.

Once a user is linked to another user's setting (using the Role ID), individual profile settings cannot be modified until the Role ID is removed.

- All user permission fields for the User are now disabled. Additionally, this user will not be available in the Control File user list.

- All user permissions and `Control File` settings will be identical to the *Role ID* this profile is linked to.

Any time changes are made to the source Role ID (in the Users Profile or Control File), all users linked to the source profile will be affected.

If a user wants to have most of the same settings as another user, but would like different settings such as a different sort of fields, link the user to the Role ID and save the record, then remove the Role ID and save again. Now all of the settings will be identical, and now changes can be made to the profile.

WinRecs Options - User profile

Profile

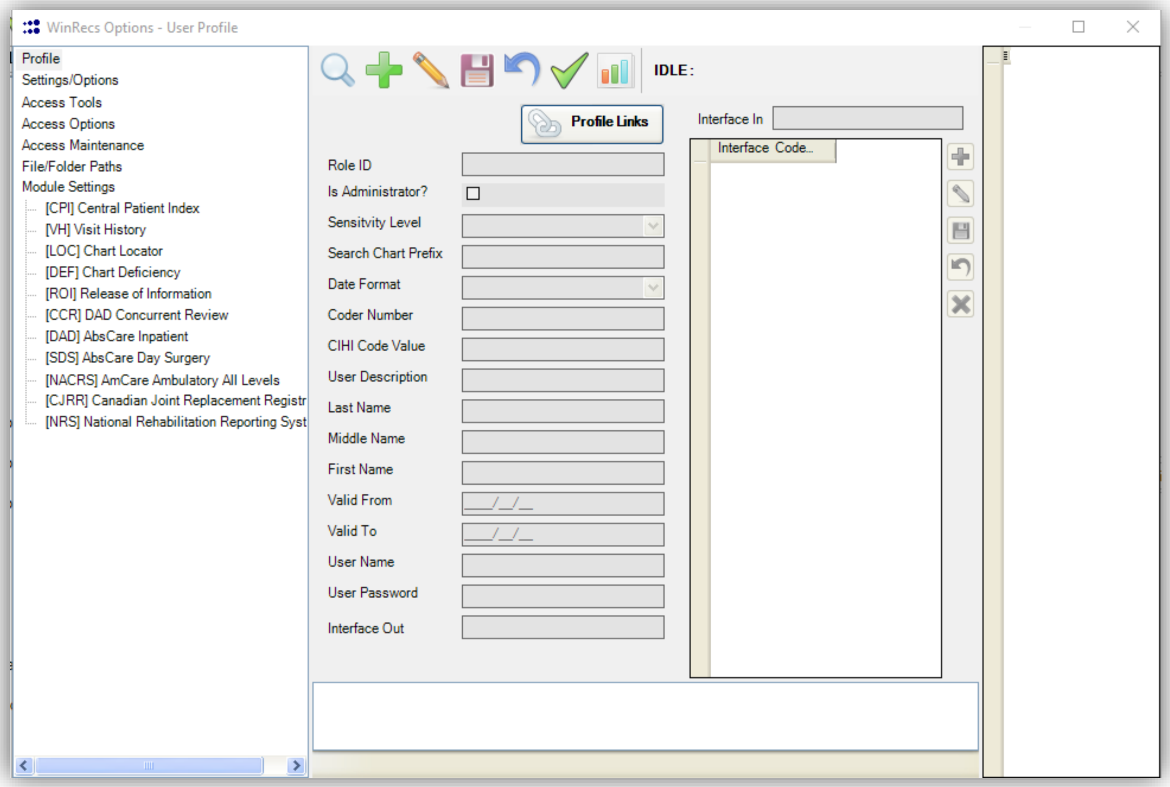
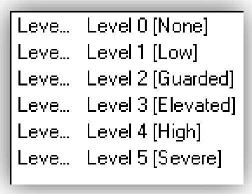


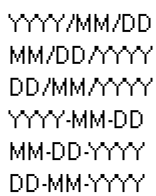
Figure 63 – User Profile – Profile Screen

- `Profile Links-` The ability to link an institution to a region if there is more than one region in the database or to a specific hospital if there is more than one hospital

- `Role ID`– Identifies the user account the user is linked to, please see Role ID
- *`Is Administrator?`* – Check the box if the user has administrative privileges, allowing the user to view all other users in the profile and make changes. If the box is not checked, the user can only view their own profile.
- *`Sensitivity Level`* – There are 5 sensitivity levels in the drop down box to choose from:



- `Search Chart Prefix` – The alphabetic prefix of the chart numbers the user can access. If blank, the user can access all records in the database. For example, if a site uses 'M' as their chart number prefix, and '*M*' is typed in the **Search Chart Prefix** field, then the user will only see charts with a prefix of '*M'*. This is useful for regions that are using a shared database.
- `Date Format` – Click on the drop down menu to specify the date format used to display on abstracts:



- `Coder Number` – The unique number assigned to each WinRecs user
- `CIHI Code Value` – This is the value submitted to CIHI where applicable. This defaults to the coder number.
- `User Description` – The custom description of the user.
- `Last Name` – The Last Name of the user
- `Middle Name` – The Middle Name of the user
- `First Name` - The First Name of the user
- `Valid From` – The date defining the start date of when the user is valid. The user account cannot be used before this date. (Mandatory)
- `Valid To` – The date defining the end date of when the user is valid. The user account can't be used after this date. (Mandatory)
- `User Name` – The name used to log in to WinRecs.
- `User Password` – The password used to log in to WinRecs, the value entered in the field is masked, see Password Setup

- `Interface Out` – Value used as region/hospital in interface populating out of WinRecs, populates with User Code.
- *`Interface In`* – Value used as the region/hospital in Batch and HL7 Interfaces
  - To add a value press
  - Add the *`Interface In`* value

    Interface In
  - Press to save the entry
  - to cancel the entry before saving
  - to delete the entry after it is saved
  - used to edit an existing value

Settings/Options

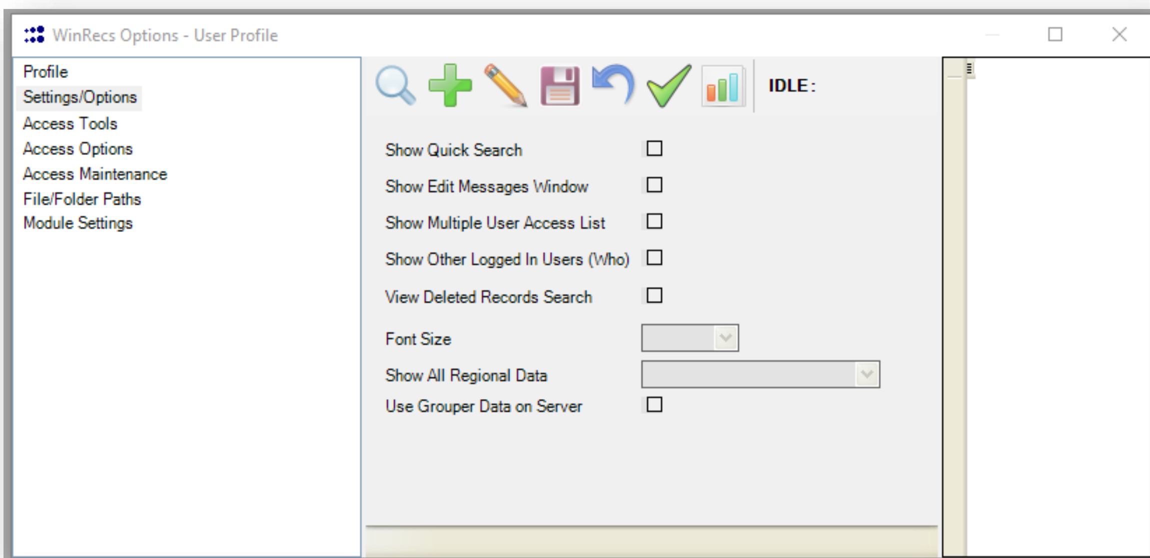


Figure 64 – User Profile – Settings/Options Screen

- `Show Quick Search` – Checking this enables the *Quick Search* feature. The *Quick Search* feature is available in Abstracting Modules. After an abstract is saved, a Visit Date and Chart number search window will display. The Window will display the previous visit date search. You can modify the date if required or you can modify the chart number. This can be set in the Preferences Menu

- `Show Edit Messages Window` – Checking this creates a pop up message of all the error messages when the abstract is opened, validated or saved.
- `Show Multiple User Access List` – Check this enables the *Show Multiple User Message* feature. When a user accesses a record when another user is in it, a message displays. "*At least one other User is currently accessing this record'.* This can be set in the Preferences Menu.
- `Show Other Logged In Users (Who)` - Allows access to a list of other users logged into WinRecs
- `View Deleted Records Search` – This field gives rights to the user to be able to see visits that have been deleted. In the search window there is a check box to 'View Deleted' records"
- `Font Size` – Can set the font size for the user. This can be set in the Preferences Menu.
- `Show All Regional Data` – Users in a regional solution can be configured to have no access, read only or full access.
- `Use Grouper Data on Server` – Allows the user to determine if the grouper runs local on the workstation or if the calculation is performed on the server. For users with less powerful workstations, setting the grouper to run on the server will decrease the amount of local resources required for WinRecs and may increase WinRecs speed. Users with more powerful workstations are recommended to set the grouper to calculate on the workstation.

Access Tools – Access to all modules in the Tools menu

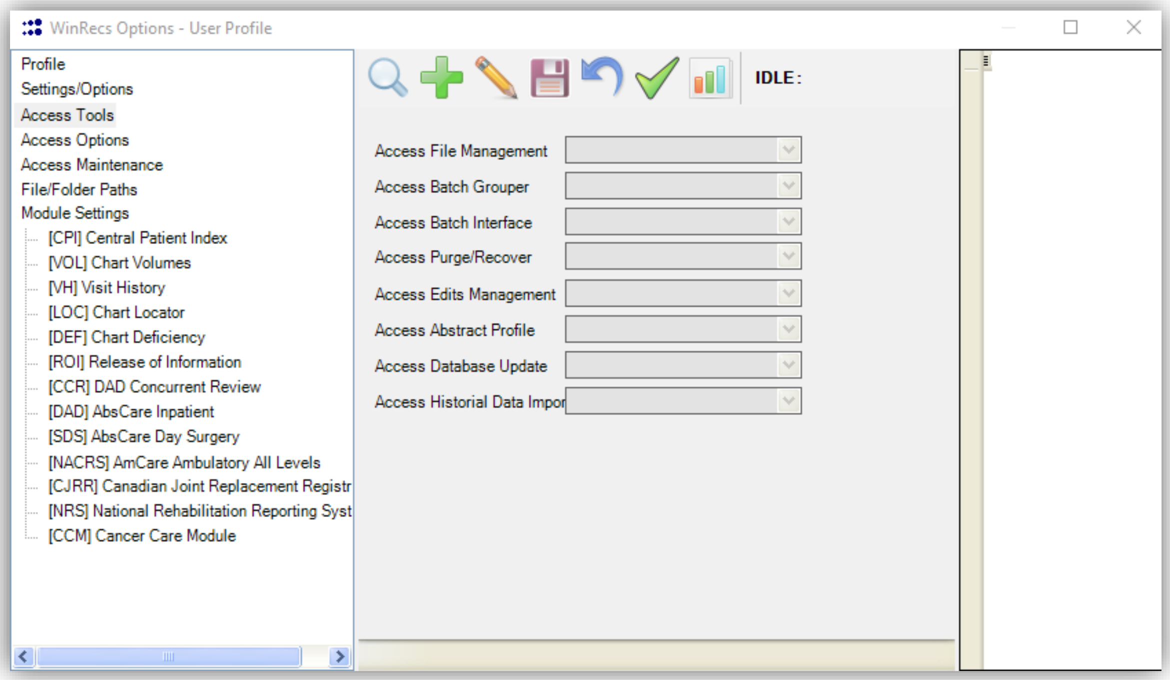


Figure 65 – User Profile – Access Tools Screen

- `Access File Management` – The drop down displays an 'Y' or 'N' option, click 'Y' will give the user access to `File Management` under the **Tools** Menu.
- `Access Batch Grouper` – The drop down displays an 'Y' or 'N' option, click 'Y' will give the user access to `Batch Grouper` under the **Tools** Menu.
- `Access Batch Interface` – The drop down displays an 'Y' or 'N' option, click 'Y' will give the user access to `Batch Interface` under the **Tools** Menu.
- `Access Purge/Recover` - The drop down displays an 'Y' or 'N' option, click 'Y' will give the user access to `Purge Recover` under the **Tool**s Menu.
- `Access Edits Management` - The drop down displays an 'Y' or 'N' option, click 'Y' will give the user access to `Edits Management` under the **Tools** Menu
- `Access Abstract Profile` – This drop down displays an "Y' or 'N' options, click 'Y' will give the user access to the `Abstract Profile` in the **Tools** Menu.
- `Access Database Update` - This drop down displays an "Y' or 'N' options, click 'Y' will give the user access to the `Access Database Update History` which is the tool used to run updates.
- `Access Historical Data Import` - This drop down displays an "Y' or 'N' options, click 'Y' will give the user access to the `Historical Data Import` in the **Tools** Menu.

Access Options – all modules found under the Options menu

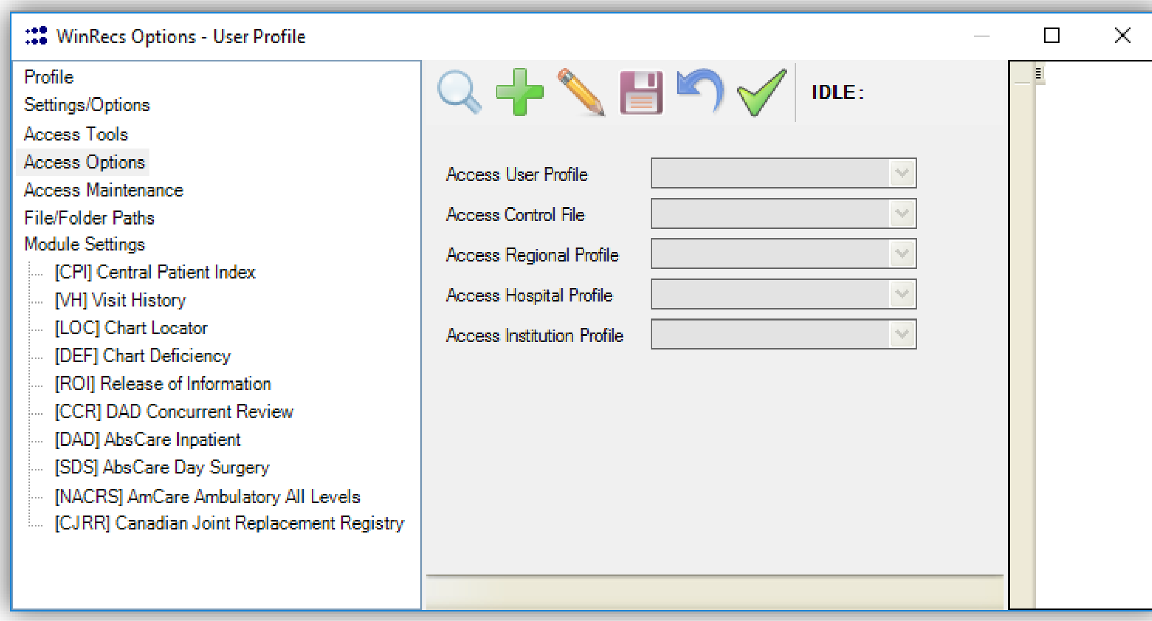


Figure 66 - User Profile – Access Options Screen

- `Access User Profile` - The drop down displays **'No Access'** the user has no access to `User Profile`, **'Read Only'** access where the user can only view the `User Profile` and **'Full'** the user can view and make changes to the `User Profile`. The **User Profile** is under the **Options** menu.
- `Access Control File` - The drop down displays **'No Access'** the user has no access to `Control File`, **'Read Only'** access where the user can only view the `Control File` and **'Full'** the user can view and make changes to the `Control File`. The **Control File** is under the **Options** menu.
- `Access Regional Profile` - The drop down displays **'No Access'** the user has no access to `Regional Profile`, **'Read Only'** access where the user can only view the `Regional Profile` and **'Full'** the user can view and make changes to the `Regional Profile`. The **Regional Profile** is under the **Options** menu.
- `Access Hospital Profile` - The drop down displays **'No Access'** the user has no access to `Hospital Profile`, **'Read Only'** access where the user can only view the `Hospital Profile` and **'Full'** the user can view and make changes to the `Hospital Profile`. The **Hospital Profile** is under the **Options** menu.
- `Access Institution Profile` - The drop down displays **'No Access'** the user has no access to `Institution Profile`, **'Read Only'** access where the user can only view the `Institution Profile` and **'Full'** the user can view and make changes to the `Institution Profile`. The **Institution Profile** is under the **Options** menu.

Access Maintenance

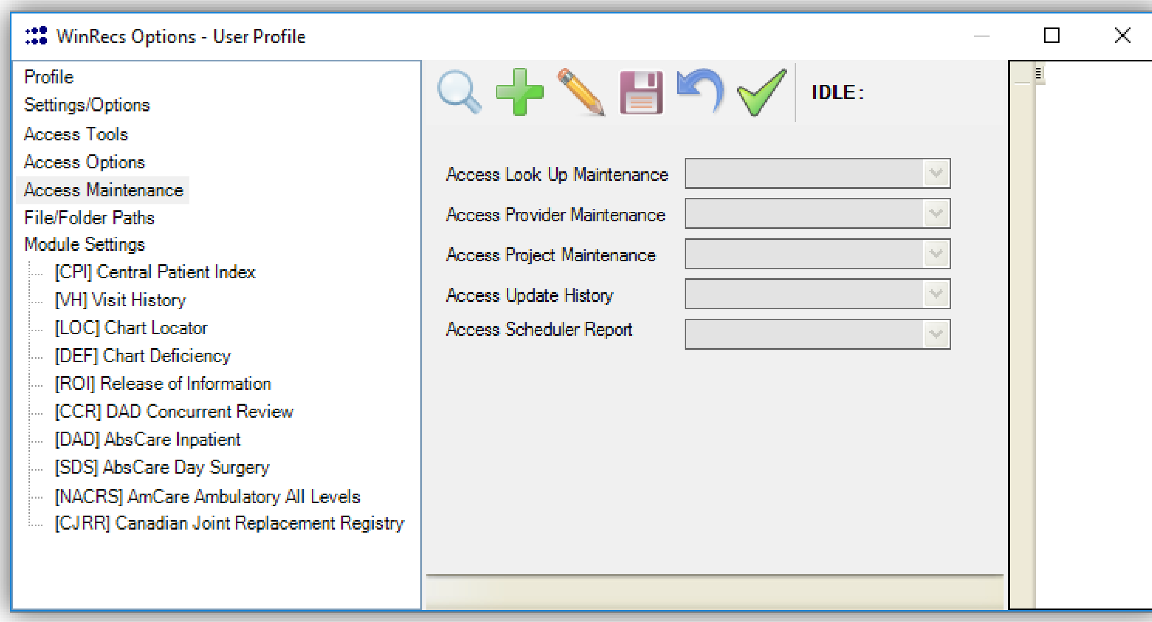


Figure 67 – User Profile – Access Maintenance Screen

- `Access Look Up Maintenance` - The drop down displays **'No Access'** the user has no access to `Look Up Maintenance`, **'Read Only'** access where the user can only view the `Look Up Maintenance` and **'Full'** the user can view and make changes to the `Look Up Maintenance`. The **Look Up Maintenance** is under the **Maintenance** menu.
- `Access Provider Maintenance`- The drop down displays **'No Access'** the user has no access to `Provider Maintenance`, **'Read Only'** access where the user can only view the `Provider Maintenance` and **'Full'** the user can view and make changes to the `Provider Maintenance`. The **Provider Maintenance** is under the **Maintenance** menu.
- `Access Project Maintenance` - The drop down displays **'No Access'** the user has no access to `Project Maintenance`, **'Read Only'** access where the user can only view the `Project Maintenance` and **'Full'** the user can view and make changes to the `Project Maintenance`. The **Project Maintenance** is under the **Maintenance** menu.
- *`Access Update History`*- The drop down displays a 'Y' or 'N' option, click 'Y' will give the user access to `Access Update History`*.* `Access Update History` is the Window Pane that displays Coder, Date and Time record was saved.
- *`Access Scheduler Report`* – The drop down displays a 'Y' or 'N' option, clicking 'Y' will give user access to scheduled reports.

File/Folder Paths

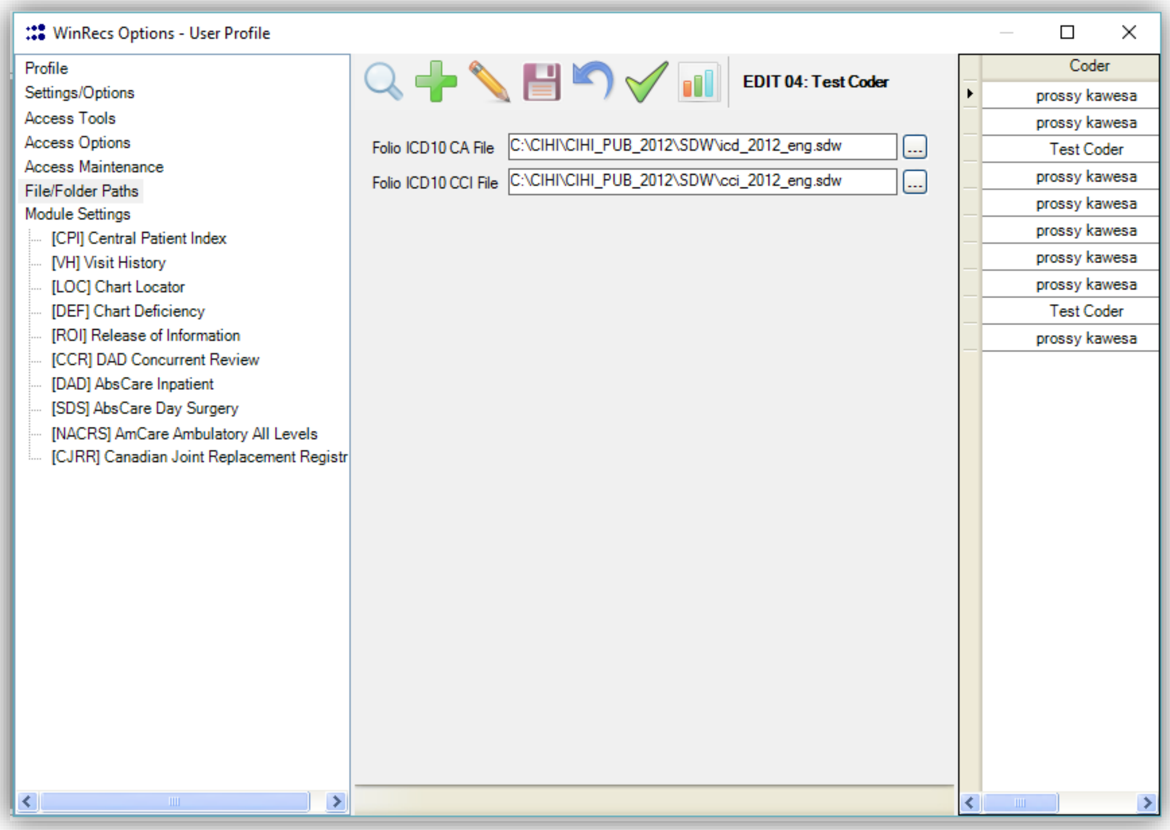


Figure 68 – User Profile – Folio/Folder Paths Screen

- `Folio ICD10 CA File` – Allows user to launch FOLIO when on the `Diagnosis Code` field when in the **Diagnosis Multiform**. Press on the to open the File Directory to find the ICD10-CA File.
- `Folio ICD10 CCI File` – Allows user to launch FOLIO when the on the `Intervention Code` field when in the **Intervention Multiform**. Press on the to open the File Directory to find the ICD10 CCI file.

See Section 5.15 Interfacing with Folio Views Code Basket

Module Settings

[CPI] Central Patient Index

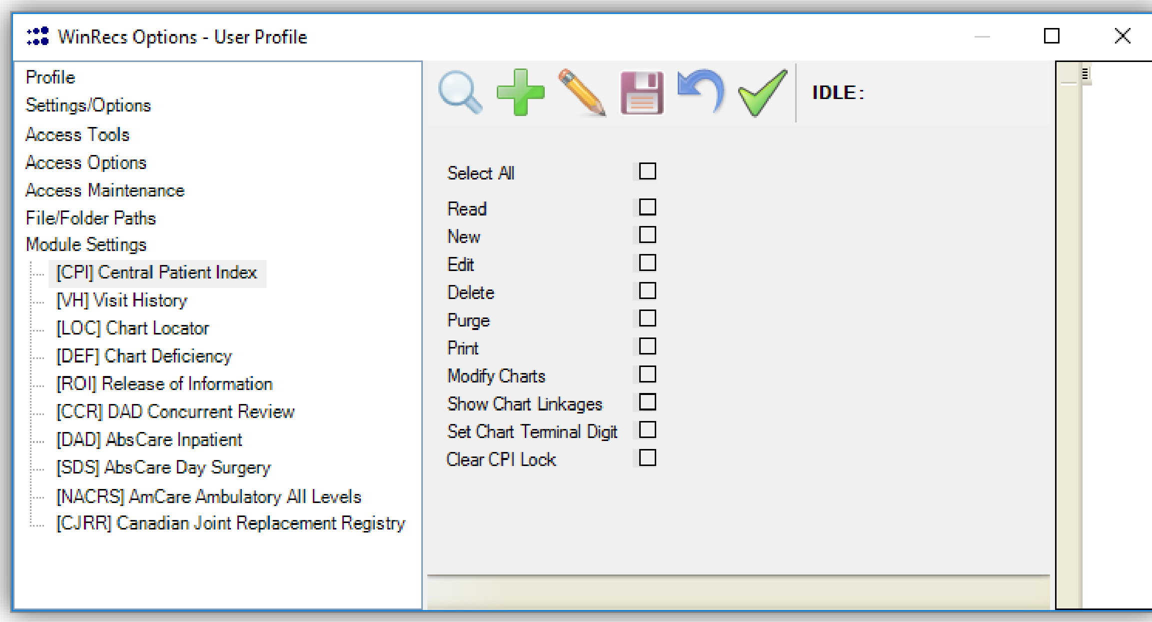


Figure 69 – User Profile – Module Settings/[CPI] Central Patient Index screen

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **CPI** module
- `New` **–** When checked allows the user to create new abstracts in the **CPI m**odule
- `Edit` – When checked allows the user to edit abstracts in the **CPI** module
- `Delete` **–** When checked allows the user to delete abstracts in the **CPI** module
- `Purge` – When checked allows the user to purge abstracts from the **CPI** module
- `Print` – When checked allows the user to print in the **CPI** module
- `Modify Charts` – Allows the user to the `Modify Charts` module in the **CPI Chart Management** feature
- `Show Chart Linkages` – When checked it will display if a chart number is linked to another chart number. The information pane will display *Potential Duplicates* or *Chart Ancestry*. When not checked the *Patient Visit History* will display.
- `Set Chart Terminal Digit` – When checked allows the user to use the **Set Chart Terminal Digit Utility**.
- `Clear CPI MODULE Lock` – When checked allows the user to clear any CPI MODULE locks by going to CPI MODULE/Actions/Clear CPI MODULE Lock and this will allow an unmerge of records.

[VH] Visit History

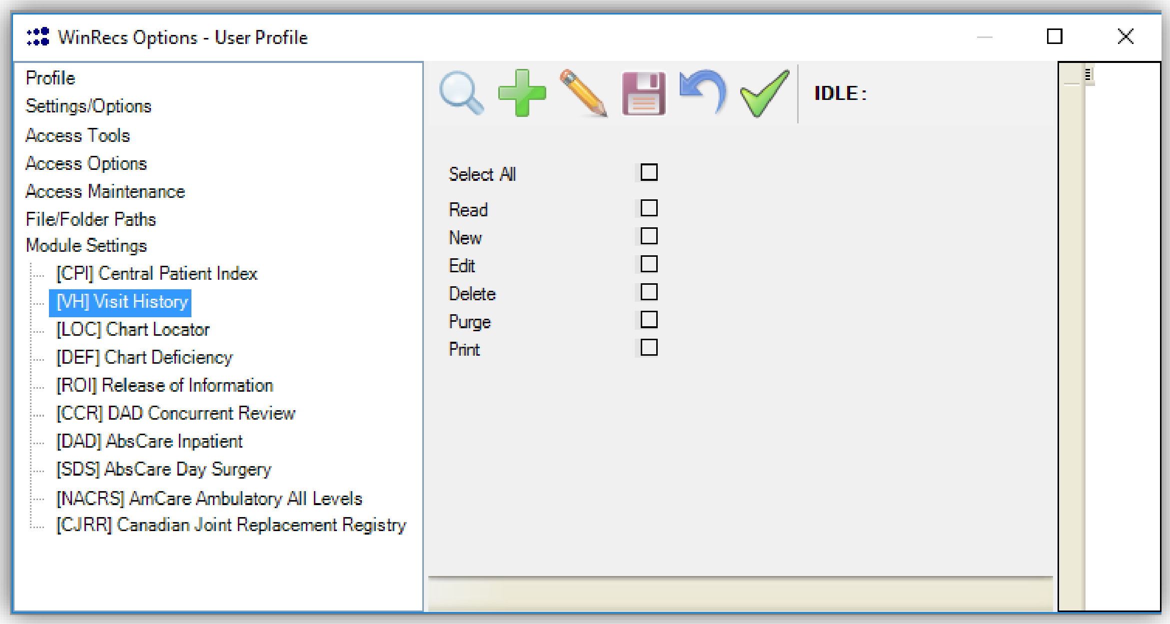


Figure 70 – User Profile – Module Settings/[VH] Visit History screen

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **Visit History** module
- `New` **–** When checked allows the user to create new abstracts in the **Visit History** module
- `Edit` – When checked allows the user to edit abstracts in the **Visit History** module
- `Delete` **–** When checked allows the user to delete abstracts in the **Visit History** module
- `Purge` – When checked allows the user to purge abstracts from the **Visit History** module
- `Print` – When checked allows the user to print in the **Visit History** module.

[LOC] Chart Locator

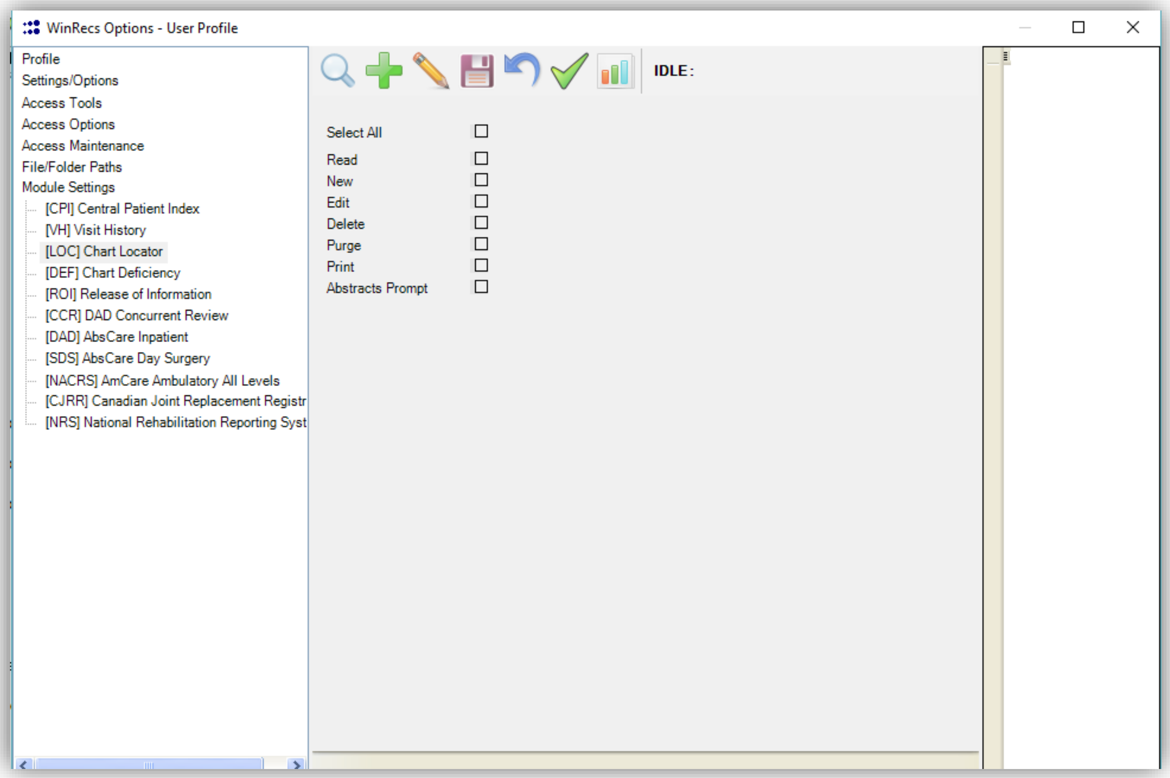


Figure 71 – User Profile – Module Settings/[LOC] Chart Locator screen

- `Select All` – Checking this button will check all the buttons below.
- *`Read`* – When checked allows the user read only access to the **Chart Locator** module
- `New` **–** When checked allows the user to create new abstracts in the **Chart Locator** module
- `Edit` – When checked allows the user to edit abstracts in the **Chart Locator** module
- `Delete` **–** When checked allows the user to delete abstracts in the **Chart Locator** module
- `Purge` – When checked allows the user to purge abstracts from the **Chart Locator** module
- `Print` – When checked allows the user to print in the **Chart Locator** module
- `Abstracts Prompt` – When checked when an abstract is saved, a prompt will display asking you to go to Chart Locator, selecting Yes will take you to the **Chart Locator** module.

[DEF] Chart Deficiency

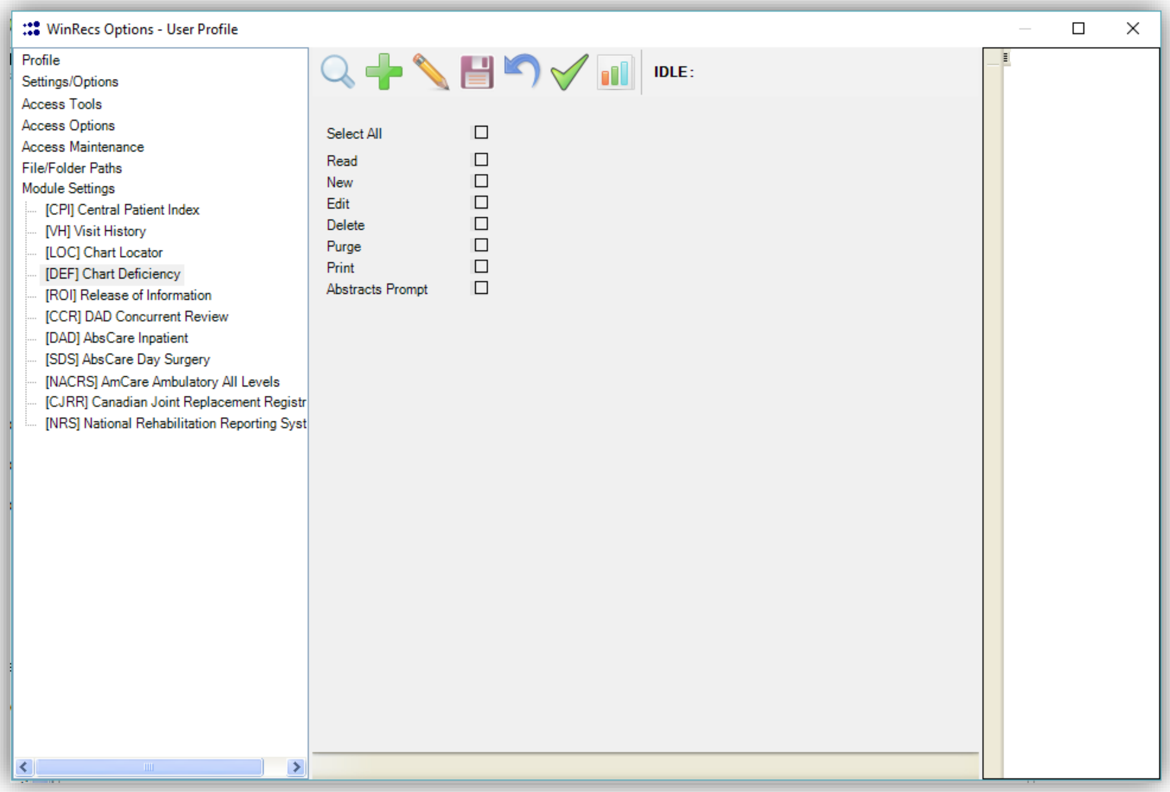


Figure 72 – User Profile – Module Settings/[DEF] Chart Deficiency screen

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **Chart Deficiency** module
- `New` **–** When checked allows the user to create new abstracts in the **Chart Deficiency** module
- `Edit` – When checked allows the user to edit abstracts in the **Chart Deficiency** module
- `Delete` **–** When checked allows the user to delete abstracts in the **Chart Deficiency** module
- `Purge` – When checked allows the user to purge abstracts from the **Chart Deficiency** module
- `Print` – When checked allows the user to print in the **Chart Deficiency** module
- `Abstracts Prompt` – When checked when an abstract is saved, a prompt will display asking you to go to Chart Deficiency, selecting Yes will take you to the **Chart Deficiency** module.

[ROI] Release of Information

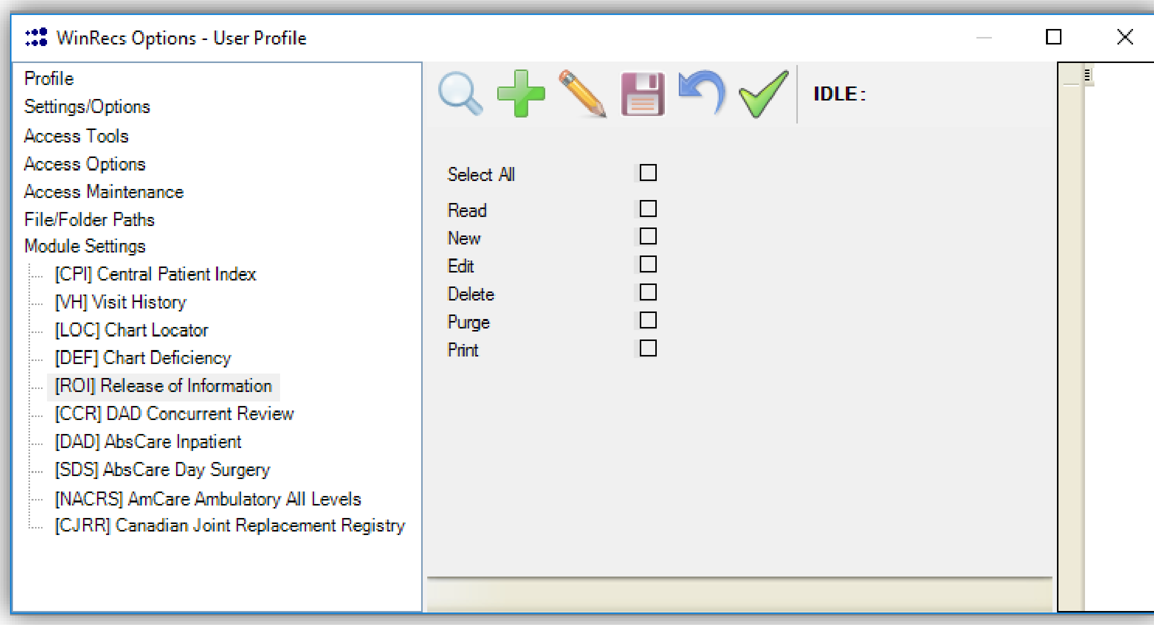


Figure 73 – User Profile – Module Settings/[ROI] Release of Information screen

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **Release of Information** module
- `New` **–** When checked allows the user to create new abstracts in the **Release of Information** module
- `Edit` – When checked allows the user to edit abstracts in the **Release of Information** module
- `Delete` **–** When checked allows the user to delete abstracts in the **Release of Information** module
- `Purge` – When checked allows the user to purge abstracts from the **Release of Information** module
- `Print` – When checked allows the user to print in the **Release of Information** module

[CCR] DAD Concurrent Review

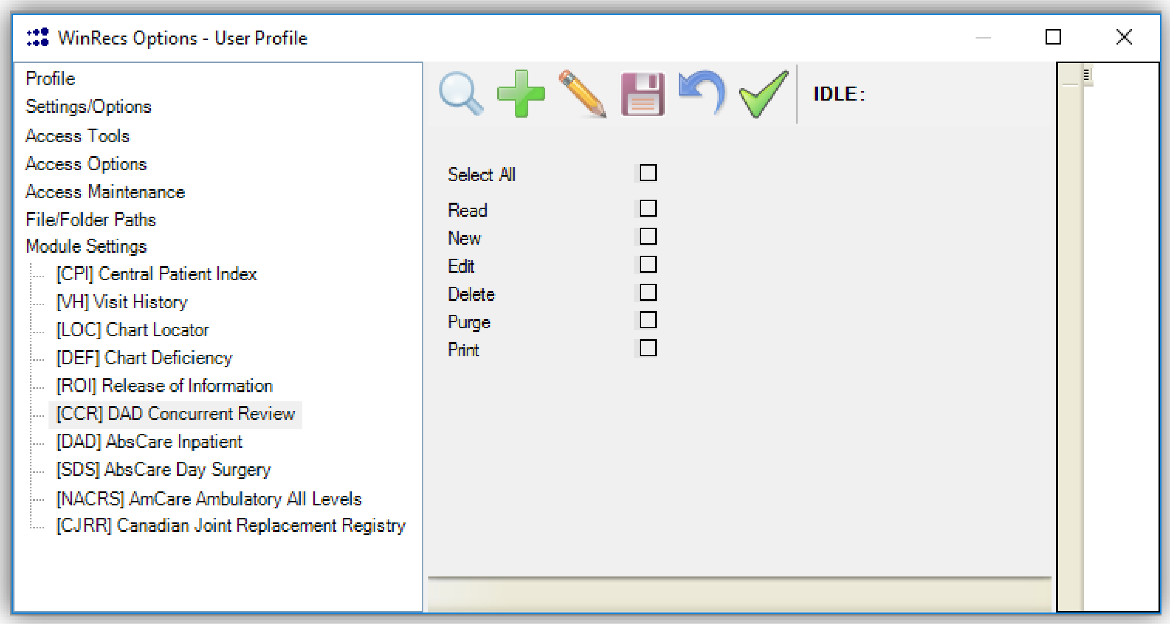


Figure 74 – User Profile – Module Settings/ [CCR] DAD Concurrent Review screen

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **DAD Concurrent Review** module
- `New` **–** When checked allows the user to create new abstracts in the **DAD Concurrent Review** module
- `Edit` – When checked allows the user to edit abstracts in the **DAD Concurrent Review** module
- `Delete` **–** When checked allows the user to delete abstracts in the **DAD Concurrent Review** module
- `Purge` – When checked allows the user to purge abstracts from the **DAD Concurrent Review** module
- `Print` – When checked allows the user to print in the **DAD Concurrent Review** module

[DAD] AbsCare Inpatient

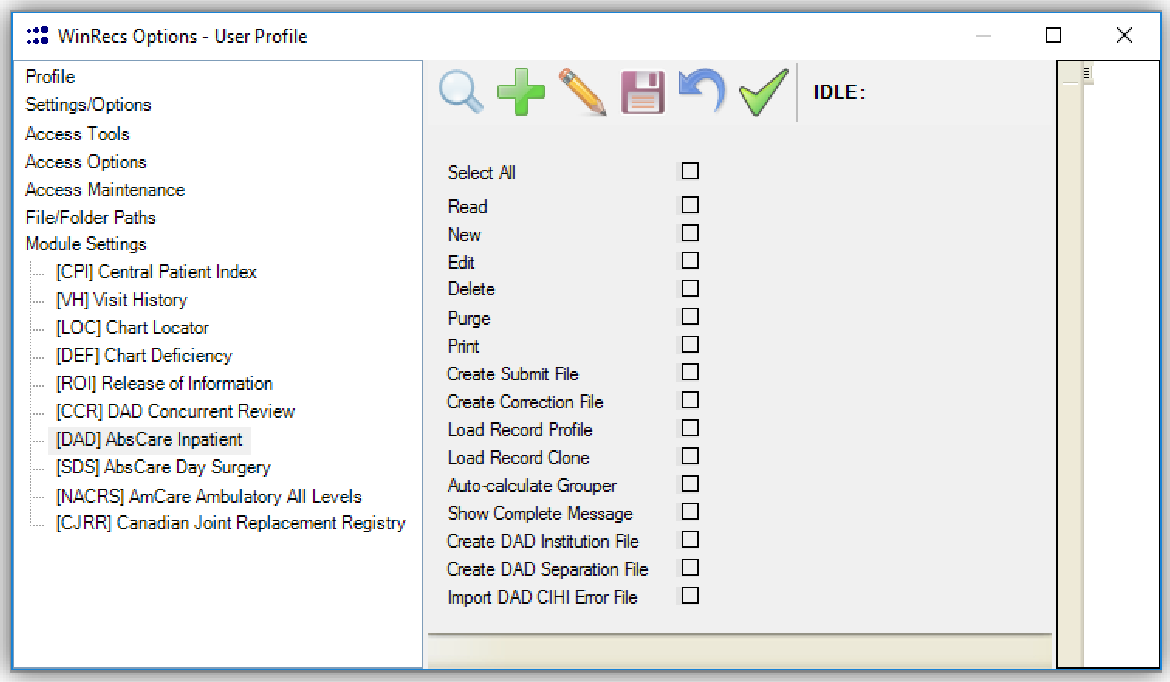


Figure 75 – User Profile – Module Settings/ [DAD] AbsCare Inpatient screen

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **AbsCare Inpatient** module
- `New` – When checked allows the user to create new abstracts in the **AbsCare Inpatient** module
- `Edit` – When checked allows the user to edit abstracts in the **AbsCare Inpatient** module
- `Delete` – When checked allows the user to delete abstracts in the **AbsCare Inpatient** module
- `Purge` – When checked allows the user to purge abstracts from the **AbsCare Inpatient** module
- `Print` – When checked allows the user to print in the **AbsCare Inpatient** module.
- `Create Submit File` – When checked allows the user to create a **CIHI Submission File**
- `Create Correction File`- When checked allows the user to create a **CIHI Correction File**
- `Load Record Profile` – Allows the user access to the `Copy Abstract Profile` **in AbsCare Inpatient** module.
- `Load Record Clone` – Allows the user access to the `Clone Abstract` routine in **AbsCare Inpatient** module.
- `Auto-calculate Grouper` – When checked allows the grouper to automatically calculate values when relevant grouper data is provided for that user.

- `Show Complete Message` – When checked, if there are no hard (red) errors, a message displays after each abstract prompting if the abstract is complete. ‘Y’ or ‘N’ is used to respond to the prompt.
- `Create DAD Institution File` – When checked allows the user to create a **DAD Institution File**
- `Create DAD Separation File` **–** When checked allows the user to create a **DAD Separation File.**
- `Import DAD CIHI Error File` – When checked allows the user to use **the Import CIHI Error File**

[SDS] AbsCare Day Surgery

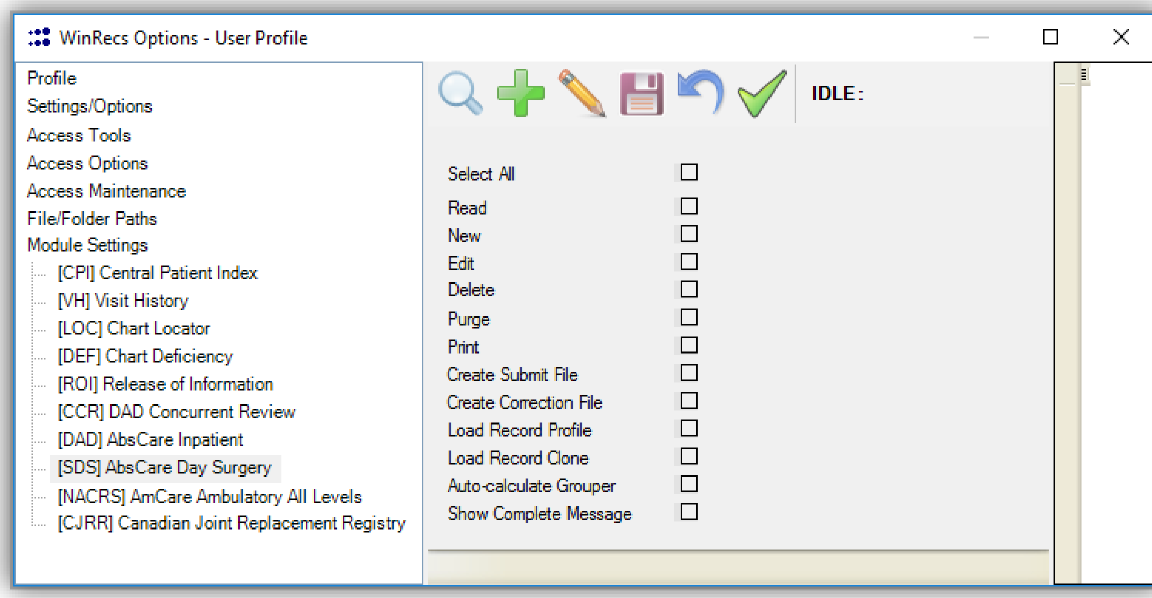


Figure 76 – User Profile – Module Settings/ [SDS] AbsCare Day Surgery screen

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **AbsCare Day Surgery** module
- `New` **–** When checked allows the user to create new abstracts in the **AbsCare Day Surgery** module
- `Edit` – When checked allows the user to edit abstracts in the **AbsCare Day Surgery** module
- `Delete` **–** When checked allows the user to delete abstracts in **the AbsCare Day Surgery** module
- `Purge` – When checked allows the user to purge abstracts from the **AbsCare Day Surgery** module

- `Print` – When checked allows the user to print in **AbsCare Day Surgery** module
- `Create Submit File` – When checked allows the user to create a **CIHI Submission File**
- `Create Correction File`- When checked allows the user to create a **CIHI Correction File**
- `Load Record Profile` **–** Allow the user access to the `Copy Abstract Profile` **in AbsCare Day Surgery** module**.**
- `Load Record Clone –` Allows the user access to the `Clone Abstract` routine in **AbsCare Day Surgery** module**.**
- `Auto-calculate Grouper` – When checked allows the grouper to automatically calculate values when relevant grouper data is provided for that user.
- `Show Complete Message –` When checked, if there are no hard (red) errors, a message displays after each abstract prompting if the abstract is complete. 'Y' or 'N' is used to respond to the prompt.

[NACRS] AmCare Ambulatory All Levels

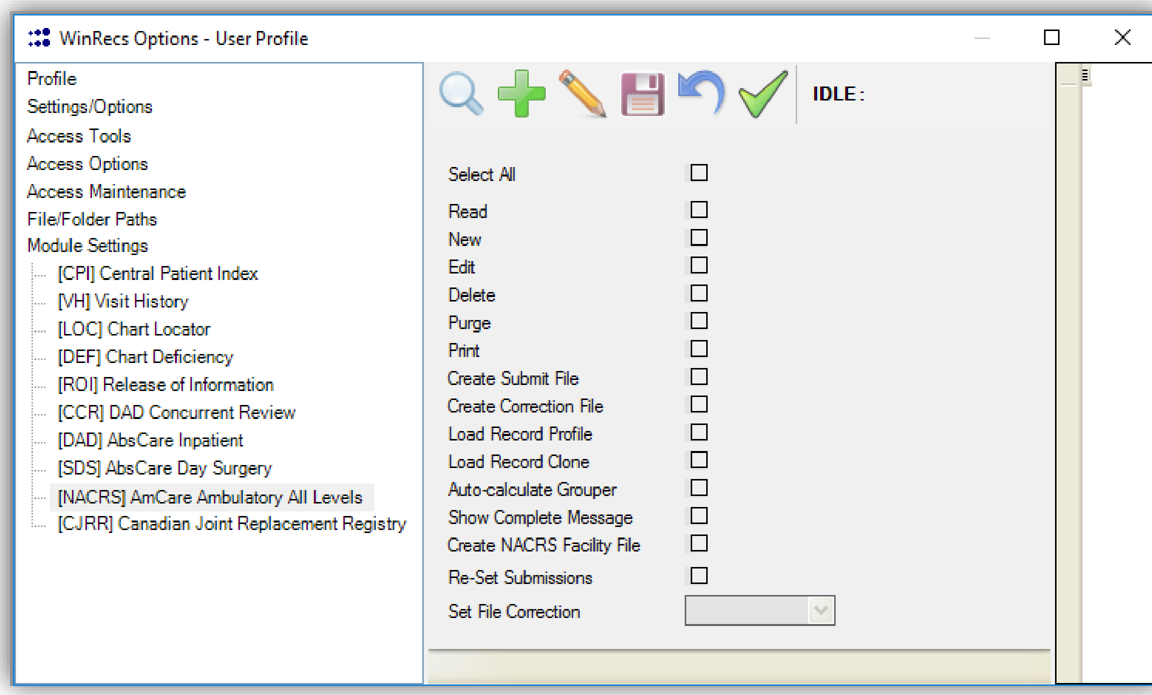


Figure 77 – User Profile – Module Settings/ [NACRS] AmCare Ambulatory All Levels

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **AmCare Ambulatory** module
- `New –` When checked allows the user to create new abstracts in the **AmCare Ambulatory** module
- `Edit` – When checked allows the user to edit abstracts in the **AmCare Ambulatory** module

- `Delete` – When checked allows the user to delete abstracts in the **AmCare Ambulatory** module
- `Purge` – When checked allows the user to purge abstracts from the **AmCare Ambulatory** module
- `Print` – When checked allows the user to print from the **AmCare Ambulatory** module
- `Create Submit File` – When checked allows the user to create a **CIHI Submission File** for **AmCare Ambulatory** module
- `Create Correction File`- When checked allows the user to create a CIHI Correction File for **Amcare Ambulatory** module
- `Load Record Profile` **–** Allow the user access to the `Copy Abstract Profile` **in Amcare Ambulatory** module
- `Load Record Clone` – Allows the user access to the `Clone Abstract` routine in **Amcare Ambulatory** module
- `Auto-calculate Grouper` – When checked allows the grouper to automatically calculate values when relevant grouper data is provided for that user.
- `Show Complete Message` – When checked, if there are no hard (red) errors, a message displays after each abstract prompting if the abstract is complete. ‘Y’ or ‘N’ is used to respond to the prompt.
- `Create NACRS Facility File` – When checked allows the user to create a **NACRS Facility File**
- `Re-Set Submission` – When checked allows the user to Re-Set Submissions in the NACRS Abstract under **File Settings→Re-Set File Create Status**
- `Set File Correction` – Gives the user different options on how to set NACRS Level 1 corrections.
    - `A - Automatic` – Automatically set the correction status as needed
    - `M – Manual` – Correction status will not be set; you will need to set it manually in the actions menu
    - `P – Prompt` – A prompt will appear asking to set the correction status.

[CJRR] Canadian Joint Replacement Registry

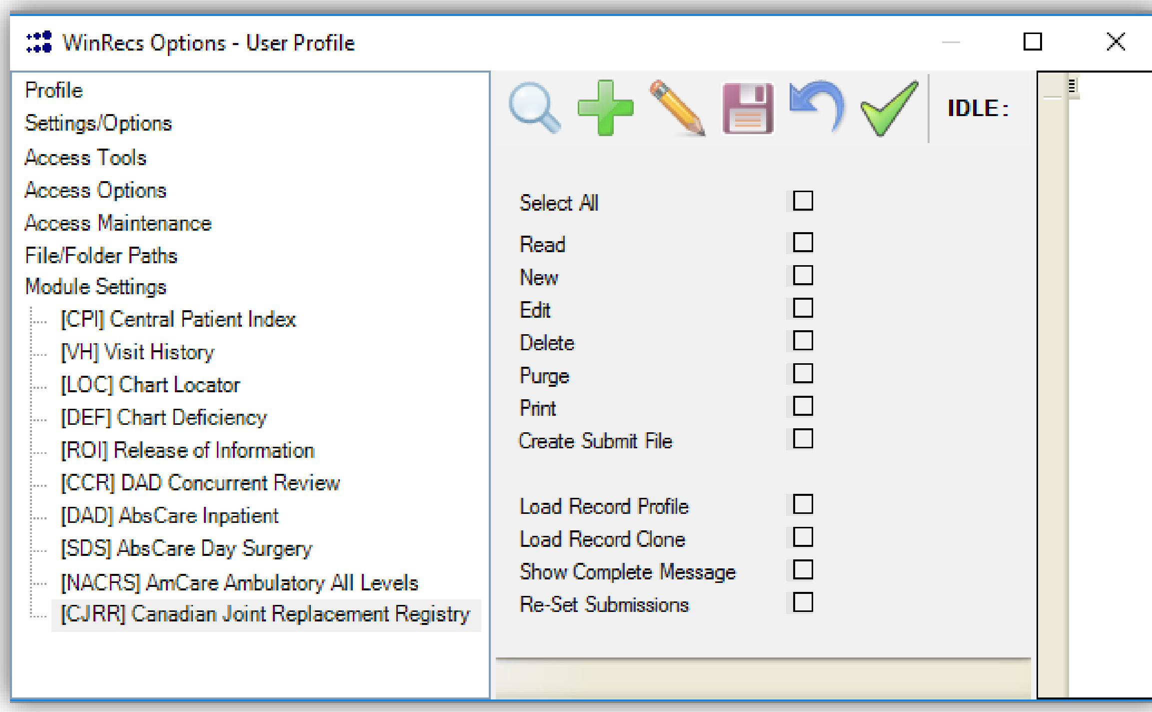


Figure 78 – User Profile – Module Settings/ [CJRR] Canadian Joint Replacement Registry

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **CJRR** module
- `New` **–** When checked allows the user to create new abstracts in the **CJRR** module
- `Edit` – When checked allows the user to edit abstracts in the **CJRR** module
- `Delete` **–** When checked allows the user to delete abstracts in the **CJRR** module
- `Purge` – When checked allows the user to purge abstracts from the **CJRR** module
- `Print` - When checked allows the user to use the print feature in the **CJRR** module
- `Create Submit File` – When checked allows the user to create a CJRR CIHI Submission File
- `Load Record Profile` **–** Allow the user access to the `Copy Abstract Profile` in the **CJRR** module
- `Load Record Clone` – Allows the user access to the `Clone Abstract` routine in **CJRR** module
- `Show Complete Message` – When checked, if there are no hard (red) errors, a message displays after each abstract prompting if the abstract is complete. ‘Y’ or ‘N’ is used to respond to the prompt.
- `Re-Set Submissions` – When checked allows the user to Re-Set Submissions in the **CJRR Abstract** → **File Settings** → **Re-set File Create Status**

[MDS] Continuing Care Reporting System

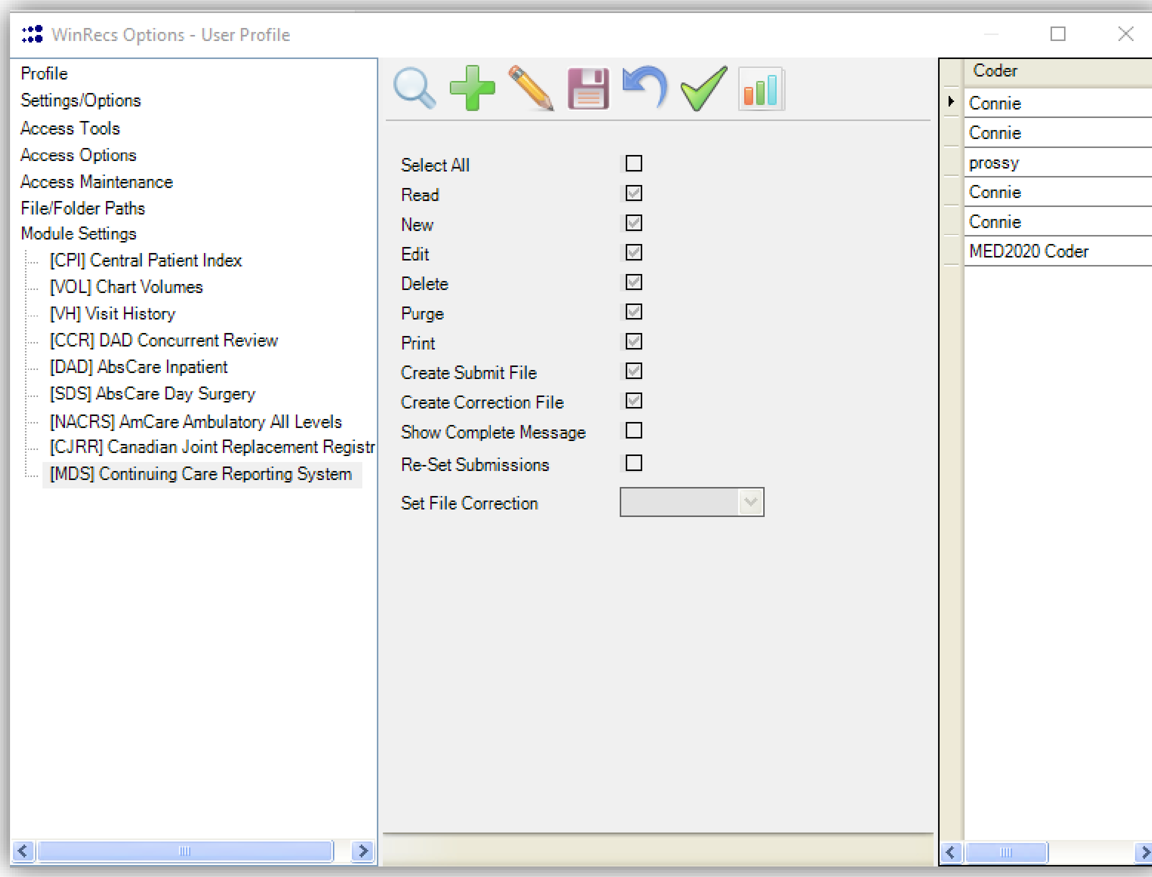


Figure 79 – User Profile – Module Settings/ [MDS] Continuing Care Reporting System

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **MDS** module
- `New` **–** When checked allows the user to create new abstracts in the **MDS** module
- `Edit` – When checked allows the user to edit abstracts in the **MDS** module
- `Delete` **–** When checked allows the user to delete abstracts in the **MDS** module
- `Purge` – When checked allows the user to purge abstracts from the **MDS** module
- `Print` - When checked allows the user to use the print feature in the **MDS** module
- `Create Submit File` – When checked allows the user to create a **MDS** CIHI Submission File
- `Create Correction File` – When checked allows the user to create a **MDS** CIHI Correction File

- `Show Complete Message` – When checked, if there are no hard (red) errors, a message displays after each abstract prompting if the abstract is complete. ‘Y’ or ‘N’ is used to respond to the prompt.
- `Re-Set Submissions` – When checked allows the user to Re-Set Submissions in the **MDS Abstract → File Settings → Re-set File Create Status**

[NRS] National Rehabilitation Reporting System

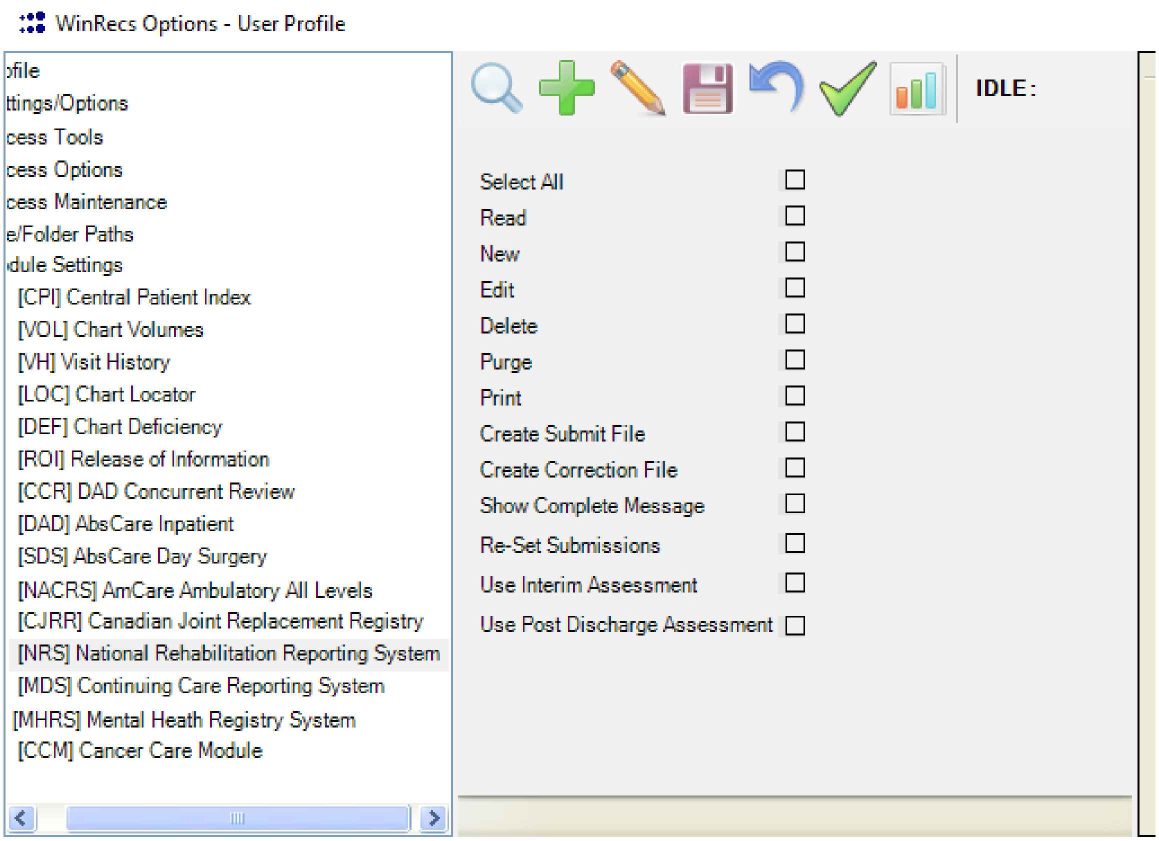


Figure 80 – User Profile – Module Settings/ NRS

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **NRS** module
- `New` **–** When checked allows the user to create new abstracts in the **NRS** module
- `Edit` – When checked allows the user to edit abstracts in the **NRS** module
- `Delete` **–** When checked allows the user to delete abstracts in the **NRS** module
- `Purge` – When checked allows the user to purge abstracts from the **NRS** module
- `Print` - When checked allows the user to use the print feature in the **NRS** module
- `Create Submit File` – When checked allows the user to create a **NRS** CIHI Submission File

- `Create Correction File` – When checked allows the user to create a **NRS** CIHI Correction File
- `Show Complete Message` – When checked, if there are no hard (red) errors, a message displays after each abstract prompting if the abstract is complete. 'Y' or 'N' is used to respond to the prompt.
- `Re-Set Submissions` – When checked allows the user to Re-Set Submissions in the **NRS Abstract → File Settings → Re-set File Create Status**
- `Use Interim Assessment` – When checked allows the user to use the Interim Assessments
- `Use Post Discharge Assessment` – When checked allows the user Use Post Discharge Assessments.

[OMHRS] Ontario Mental Health Reporting System

- `Re-Set Submissions` – When checked allows the user to Re-Set Submissions in the **NRS Abstract → File Settings → Re-set File Create Status**

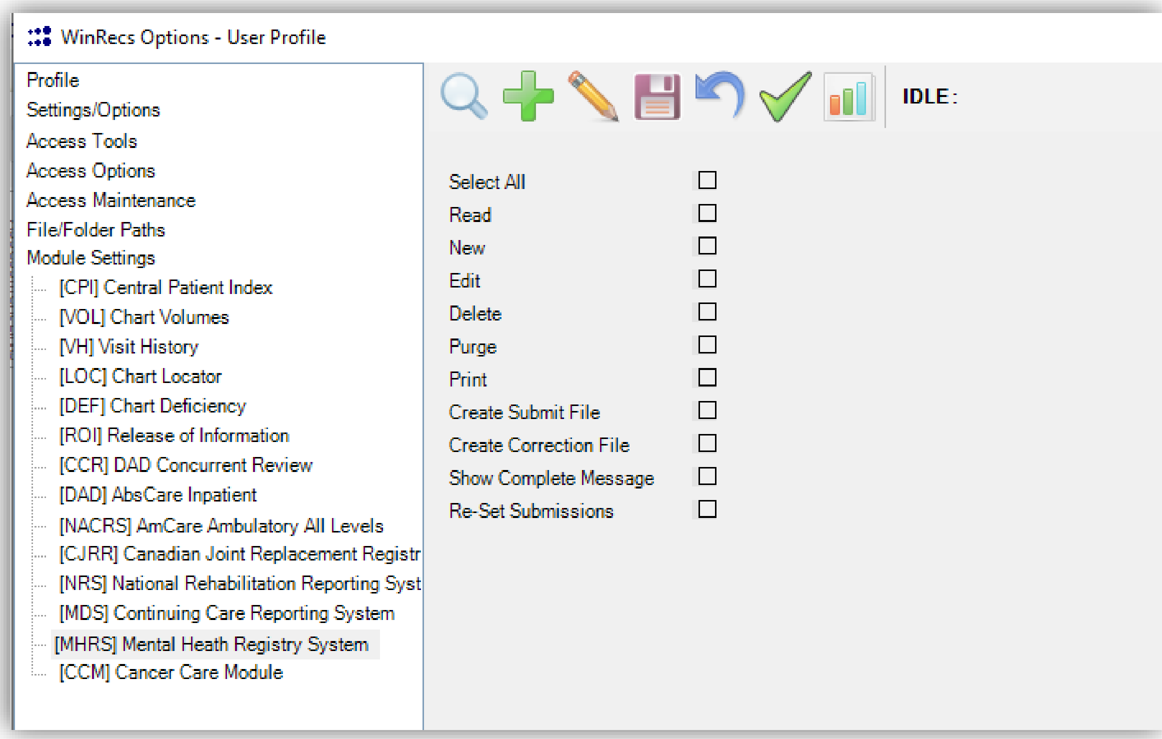


Figure 81 – User Profile – Module Settings/ OMHRS

- `Select All` – Checking this button will check all the buttons below.
- `Read` – When checked allows the user read only access to the **OMHRS** module

- `New` **–** When checked allows the user to create new abstracts in the **OMHRS** module
- `Edit` – When checked allows the user to edit abstracts in the **OMHRS** module
- `Delete` **–** When checked allows the user to delete abstracts in the **OMHRS** module
- `Purge` – When checked allows the user to purge abstracts from the **OMHRS** module
- `Print` - When checked allows the user to use the print feature in the **OMHRS** module
- `Create Submit File` – When checked allows the user to create an **OMHRS** CIHI Submission File
- `Create Correction File` – When checked allows the user to create an **OMHRS** CIHI Correction File
- `Show Complete Message` – When checked, if there are no hard (red) errors, a message displays after each abstract prompting if the abstract is complete. 'Y' or 'N' is used to respond to the prompt.
- `Re-Set Submissions`– When checked allows the user to Re-Set Submissions in the OMH**RS Abstract** → **File Settings** → **Re-set File Create Status**

2.5 Control File

The Control File is used to specify default values for fields, change field name, restore fields on the main grid, make fields visible/invisible or enable/disable for each module.

> **If a user does not have administrative rights, the user can only modify their own settings. If a user is linked to a Role ID in the User Profile, the user will not be able to change the Control File settings.**

To access the Control File

Select **Options** → **Control File**

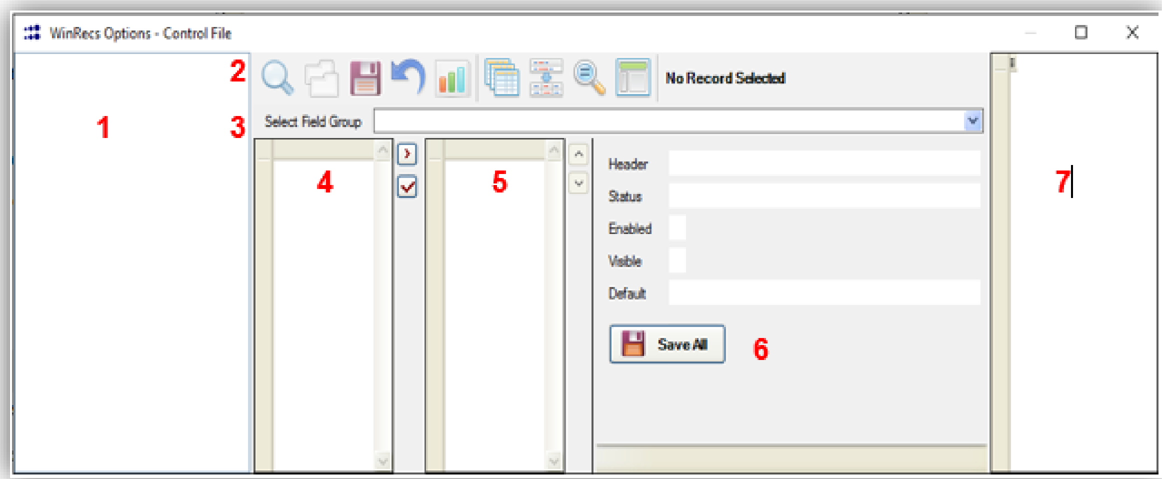
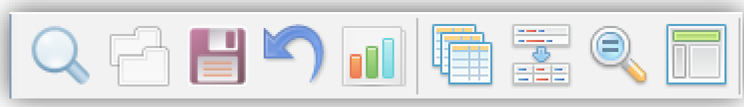
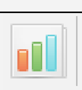
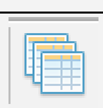


Figure 82 – Control File Screen Options

1. **Control File Options** – Displays the list of modules
2. **Toolbar**



Toolbar items with functionality and short cut keys listed.

Icon	*Menu Item*	*Function*	*Keyboard*
	**Find**	Search for an existing profile	**[F4]**
	**Copy**	Copy a profile	**[F5]**
	**Save**	Saves changes to the current profile	**[F7]**
	**Cancel**	Cancels changes made	**[F8]**
	**Reports**	If applicable this button displays a list of available reports to view	**[F10]**
	**Multiple Occurrence Fields**	Apply settings, change sort order to each of the fields in the multiform	**N/A**

	Group Headers	Apply settings for each Field Group	**N/A**
	Search Fields List	Apply the fields to display in the Search Results for each module.	**N/A**
	Record Information Fields List	Apply the fields that display in the Record Information Elements window.	**N/A**

Table 10 - Control File Toolbar

3. **Select Field Group** – The fields in the main grid within WinRecs are grouped together. The drop down menu provides the Group Header.
4. **Fields** – The list of the fields that are within the selected module.
5. **Field Group** - The fields that are within the group chosen in the **Select Field Group**
6. **Settings Options –** The settings option for each group/field:
   - `Header` – the name of the field, the name of a field can be changed to reflect terminology a site may use.
   - `Status` – the drop down allows the assignment of the following options:
     - **Not Set – there is no status assigned to the field**
     - **Hospital Required – the abstract will not save if the field is blank**
     - **Hospital Error – the field will generate an error if left blank**
     - **Hospital Warning – the field will generate a warning if left blank**
   - `Enabled` - when checked the field is accessible in the abstract, not checked the field will be greyed out and not accessible.
   - `Visible` – when checked the field can be viewed in the abstract, not checked the field will be not show in the abstract
   - `Default` – can enter a default value for the field. If there are set values can select the value from a drop down list or press **[F2]** and a searching window for the field will popup.
   - `Save All` – this function allows the field to be saved on all users and profiles.
7. **Update History**– Display the details of whom made changes to the item selected from the control file options section. The coder name and the date and time the changes were made will be listed

Find

The first step to accessing fields the Control File is to select a User or Role ID. When editing the Role ID all users linked to the Role ID will have the same Control File settings.

- Press **[F4]** or click on the icon.
- Double click the User

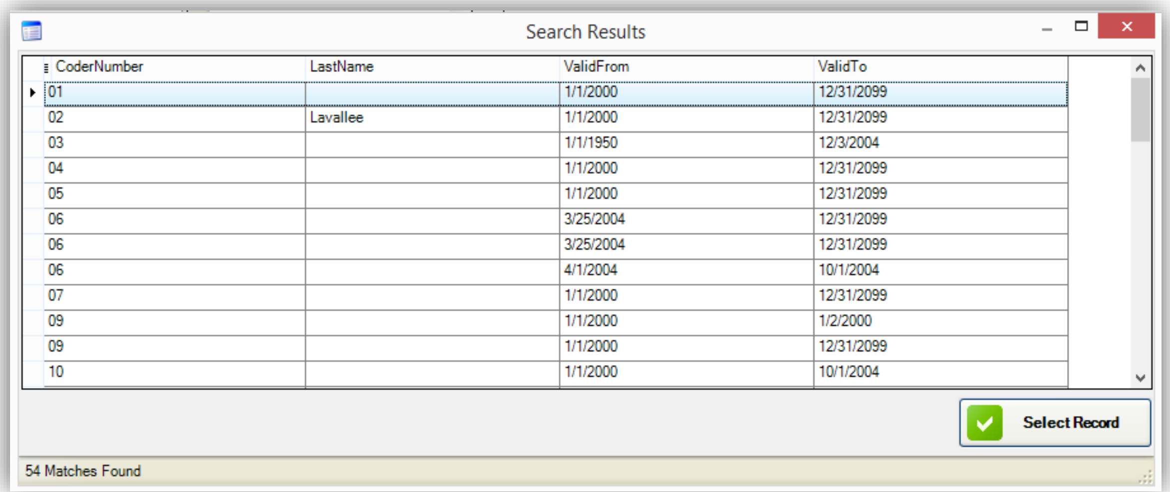
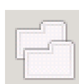


Figure 83 – Control File Search Screen

Copy

Copy is a function that allows another users module settings to the copied to another users account.

When working on a user account select the module that needs to be copied.

Press the Copy Button  and the following message will display:

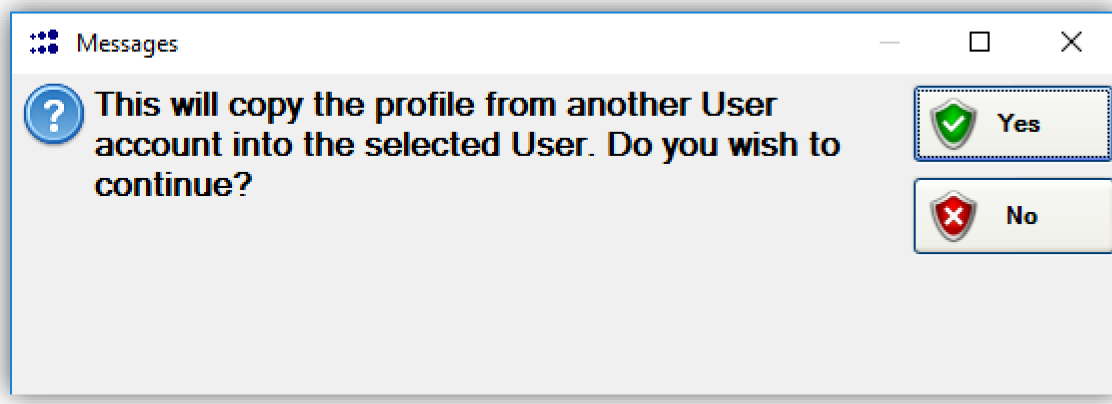


Figure 84 - Control File Message for Copying a User Account

- Selecting 'Yes' will bring up the Search Results window with the list of users and Role ID's that can be copied.
- Select the user account that needs to be copied. Once complete the user will be back to the main Control File screen with all the changes applied.

Choosing Modules

Once the user has been selected, the modules that the user has access to will be displayed on the left-hand side. Click on the module that needs to be modified. Once the module has been selected the fields will be displayed and the Select Field Group drop down will now have options available to select from.

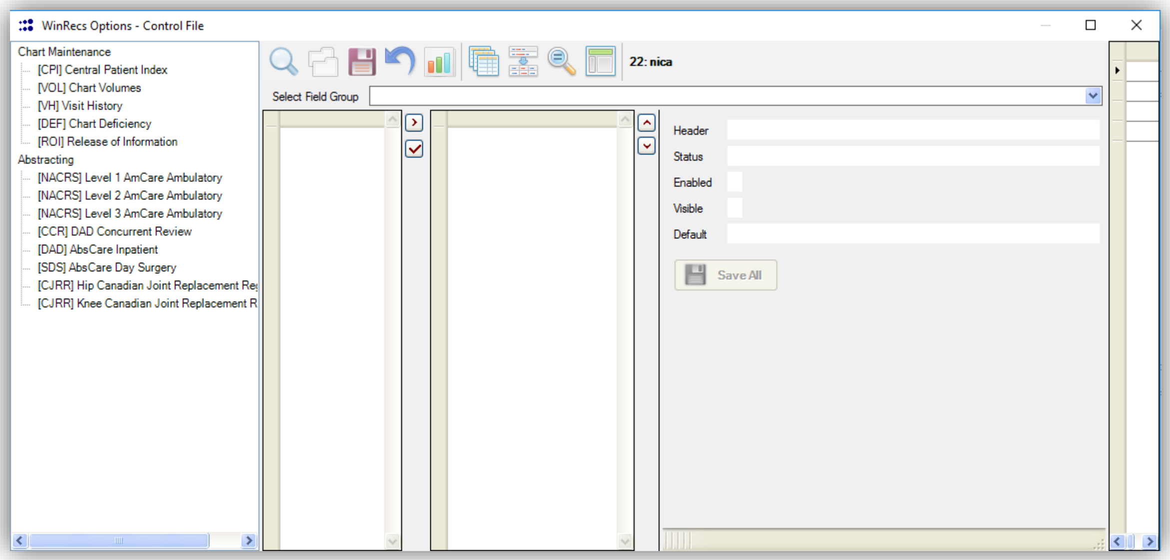


Figure 85 - Control File Options

Field List

This gives the user the ability to adjust the fields within the main grid of the abstract.

- Click on the module that contains the field that needs to be adjusted.
- The list of fields available for that module will appear on the Fields List panel.

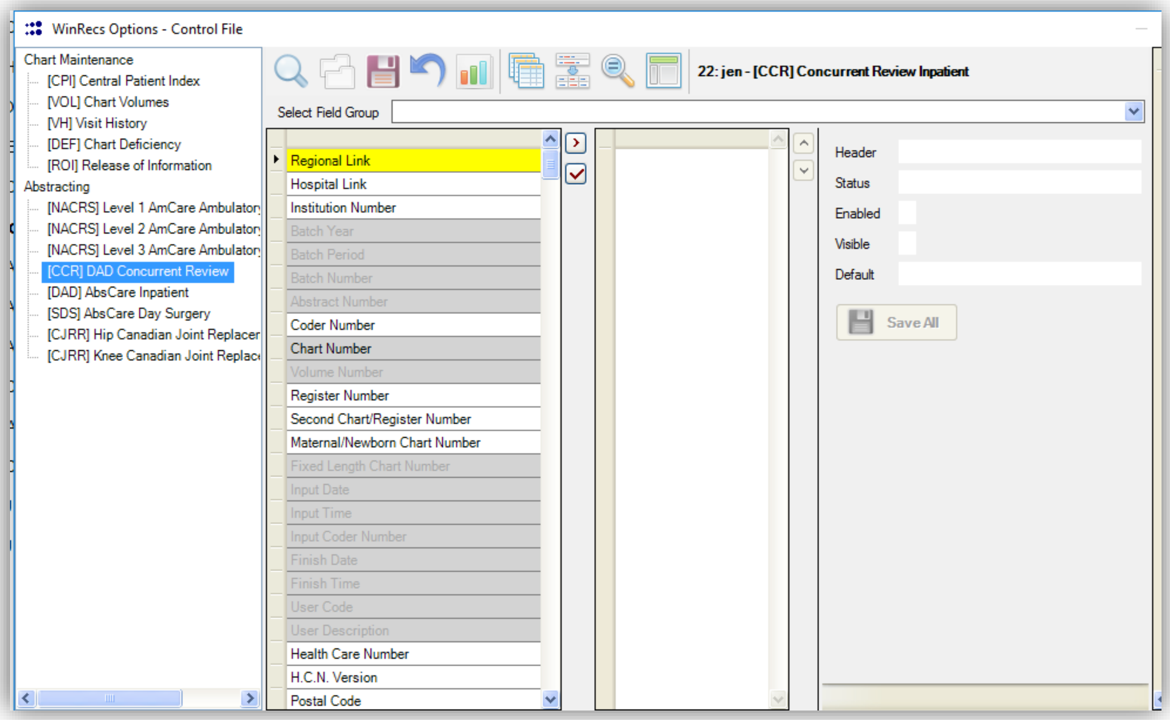


Figure 86 - Field List

- Any fields that are highlighted grey are **Visible** but not **Enabled.**

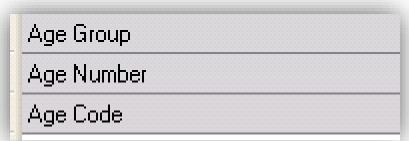


Figure 87 – Visible but Not Enabled

- Any fields highlighted grey and the font is grey are not **Visible** and may or may not be **Enabled.**

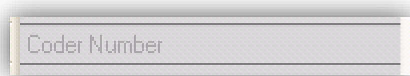


Figure 88 – Not Visible, May or May not be Enabled.

- Some fields maybe highlighted grey and are only made visible. If a field cannot be enabled, it could be the field is a calculated field or a field cannot be changed.

Figure 89 – Calculated Fields

- To modify a field, select the field and click the check mark  button.
- The **Select Field Group** dropdown will fill in and populate the **Field Group** with all the fields contained within the Group.
- The **Settings Options** area will also display the options for the field selected. See Setting Options

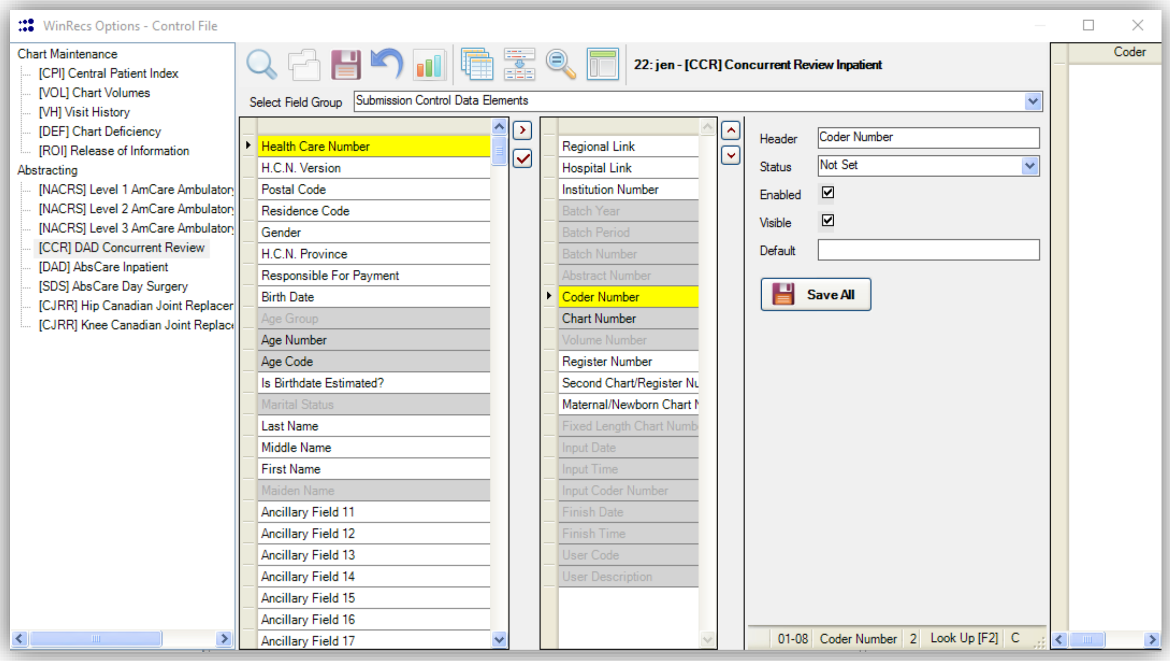


Figure 90 - Field List Selection

- To make changes to a different field in a different field group, there are 2 options:
  - Navigate to the field listed under the Fields list and use the check mark button to populate the Settings Options.
  - Use the Select Field Group drop down to select the group header that the field belongs and click the field title.

Moving Fields

The **Control File** has the ability to move fields into different **Field Groups**.

- Click on the field in the **Field** list.

- In **Select Field Group** select the field group to move the field to.
- Click on the arrow button between the **Field List** and **Field Group** or double click on the field and it will move the **Field Group**
  - **For example:** Moving the field 'Maternal/Newborn Chart Number' from the 'Submission Control Data Elements' field group to 'Patient/Client Demographics Information'
  - In the **Select Field Group** click on the drop down menu and click on 'Patient/Client Demographics Information'
- In the Field List Click on 'Maternal/Newborn Chart Number' so it is highlighted yellow and press the or double click the field and it will move to the 'Patient/Client Demographics Information' group

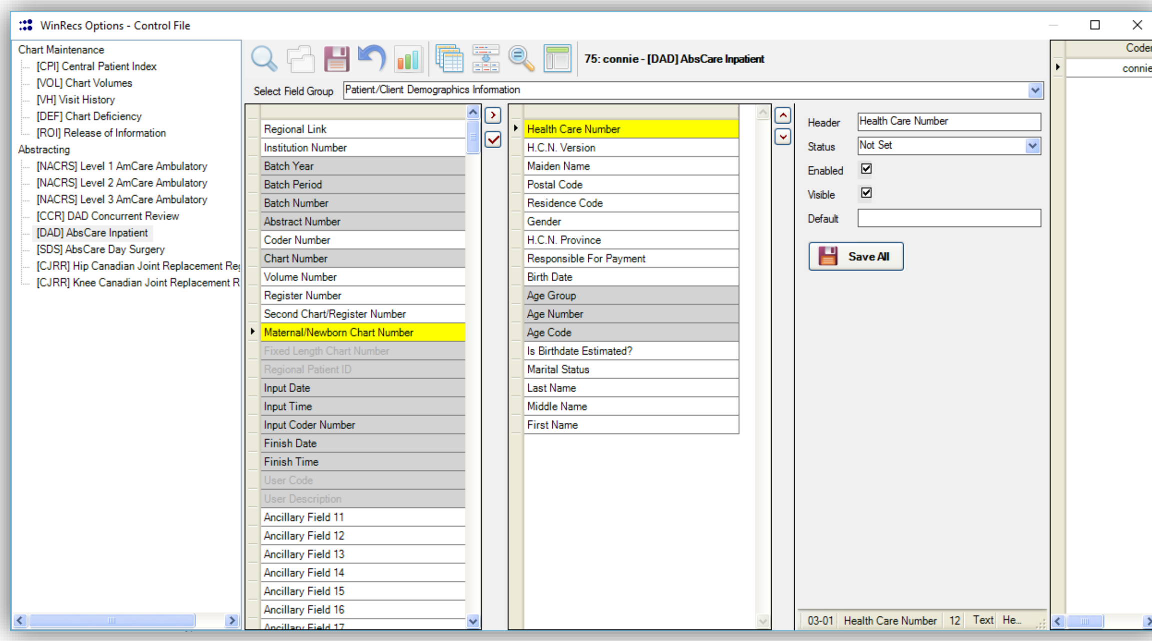


Figure 91 – Moving Fields to New Field Group

- To move a field back to it's original **Field Group**
  - Click on the field in the **Field List**
  - In **Select Field Group** choose the group the field was in
  - Press the arrow button to move

- To move the field up or down, click on the field in the **Field Group** list
  - Click on the up and down arrows to move the field up or down.

Save

To save the changes for a user select the save button or press F7.

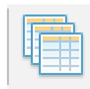
To save the changes for all users in the system select the Save all button .

Cancel

To cancel any changes made press the  or press F8.

Multiple Occurrence Fields

This options allows the ability to adjust the fields within the multi-forms of the abstract.

- Click on the Multiple Occurrence Fields button.  A pop up screen will display:

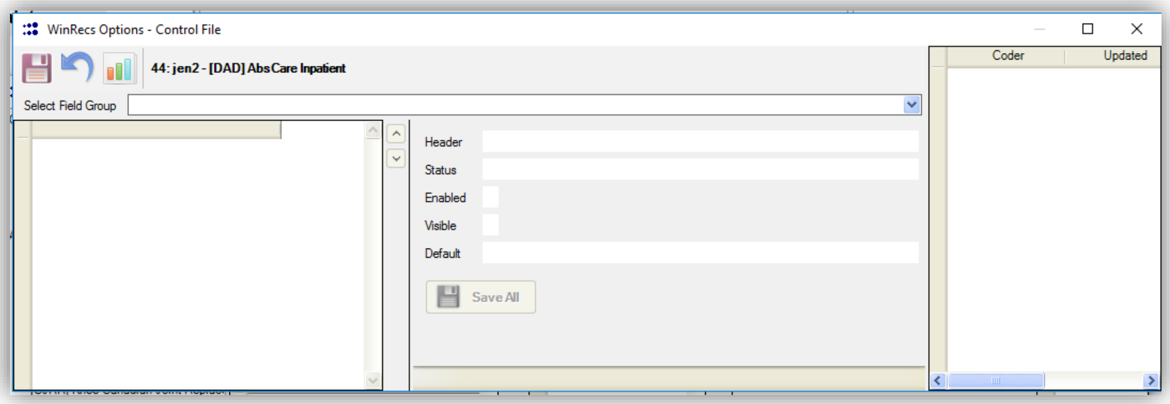
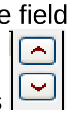


Figure 92 – Control File Multiple Field Entry List

- Click down on the '**Select Field Group'** and choose the multiform that needs adjusting, the list of fields for the selected multiform will populate on the left panel.   The first field will be highlighted by default.
- To move the field up or down, click on the field to be moved
  - Click on the up and down arrows  to move the field up or down.
- The settings options can also be set for the fields . See Setting Options

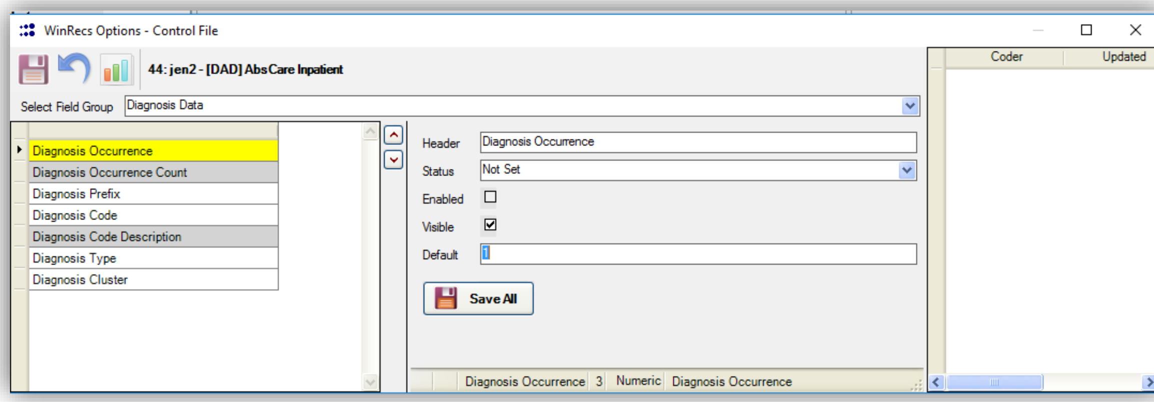
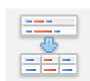


Figure 93 - Control File Multiple Field Entry List Specific

Group Headers

The Control File has the ability to adjust the setting for a whole section within the Abstract.

To adjust the setting of a section:

- Click on the Group Header icon . A pop up screen will display
- The list of Field Group Headers for that module and the Setting Options will display. Please note that the Status is not accessible. In the example below, the [DAD] AbsCare Inpatient module has been selected therefore the list of headers show in the popup window apply to that module.
- On this window the Header can be edited.

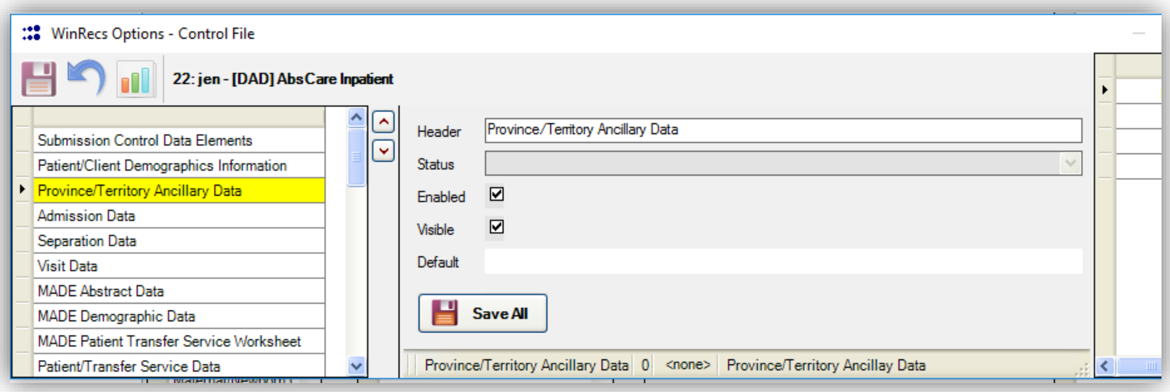


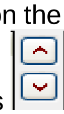
Figure 94 – Control File Group Header Screen

- If the **Enabled** and **Visible** were unchecked, this whole section would not appear in the abstract and the group would be highlighted grey and the font would be grey

Figure 95 – Enabled and Visible Unchecked

- If the **Enabled** was unchecked and the **Visible** was checked, the whole section would appear in the abstract but the user would not be able to enter into the fields in that section

Figure 96 – Enabled Unchecked and Visible Checked

- To move the field up or down, click on the group to be moved
  - Click on the up and down arrows  to move the field up or down

Search Fields List

The Search Fields List is where the settings and configuration of the Search Results window are configured for each module. The fields and order in which the fields are to be displayed on the Search Results window can be configured here for each user.

- After selecting a user and the module that needs to be modified click the Search Field List icon 

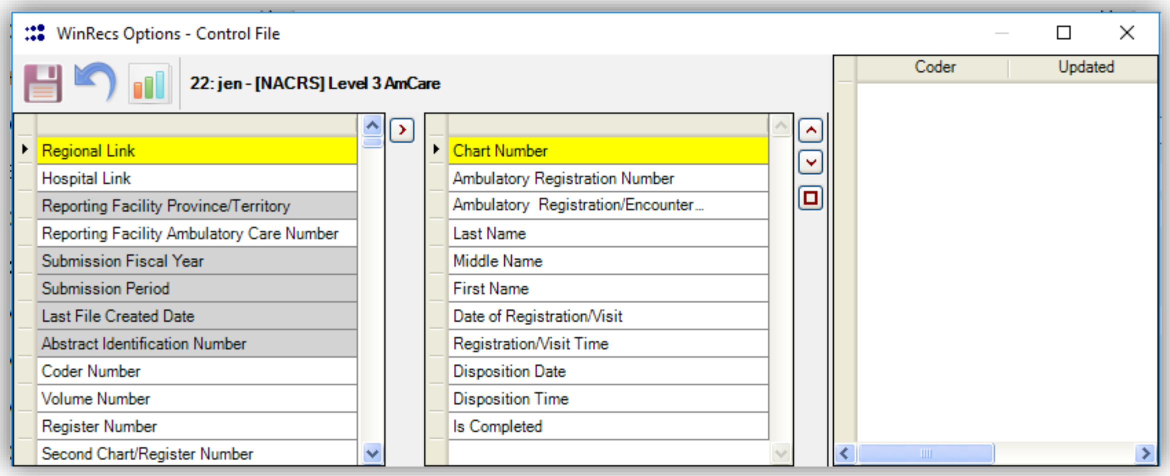
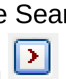
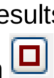


Figure 97 - Control File Search Fields List

- The first column list of fields for the selected module in the first column (all fields including multiform)
- The second column lists all the fields already selected to show in the Search Results window and the order they will be displayed.
- The third column lists who and the date the Search Fields list had been modified
- To add a field to the Search Results window, click on the field that needs to be added and click the add button 
- To remove a field from the Search Results window, click on the field that needs to be removed and click the remove button 
- To rearrange the order of the fields, select a field to be moved and click the appropriate arrow to move the field up  or down 

Record Information Fields List

This allows the user to select the fields to be displayed in the Record Information Elements screen.

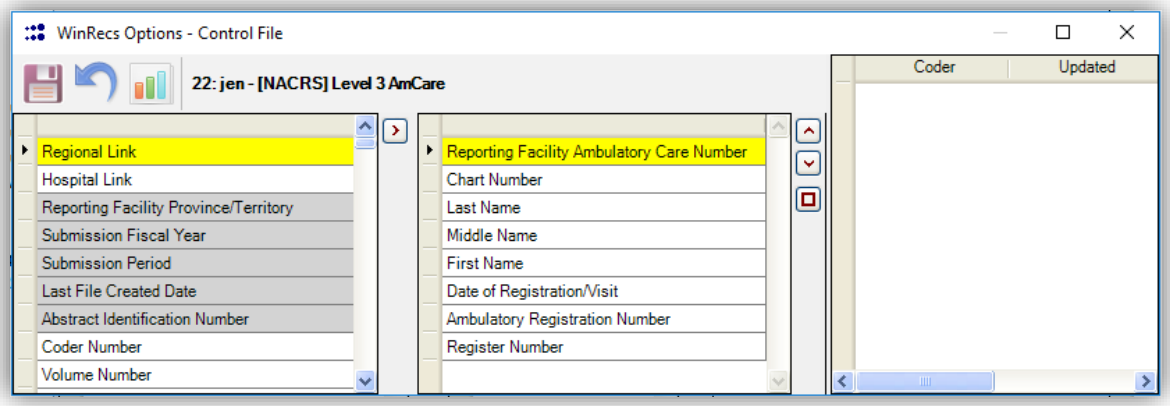


Figure 98 - Control File Record Information Fields List

- The first column contains all the fields from the main grid and multi-forms,
- The second column contains the fields shown in the Record Information Elements.
- The third column lists who and the date the Record Information Fields list had been modified
- To add a field to the Record Information Elements window, click on the field that needs to be added and click the add button
- To remove a field from the Record Information Elements window, click on the field that needs to be removed and click the remove button
- To rearrange the order of the fields, select a field to be moved and click the appropriate arrow to move the field up or down

User Defined Fields

WinRecs provides 6 User Defined Fields (UD) and 25 of each. These fields are found in all modules as follows:

- User Date Fields (1-25)
- User Time Fields (1-25)
- User Note Fields (1-25)
- User Look Up Fields (1-25)
- User Text Fields (1-25)
- User Numeric Fields (1-25)

These fields are set up in the Control File and can be found at the end of the of all fields in the main grid or can be found by selecting the Select Field Group drop down menu. User Defined Fields can be moved to other areas on the main grid, but cannot be included in multi-forms.

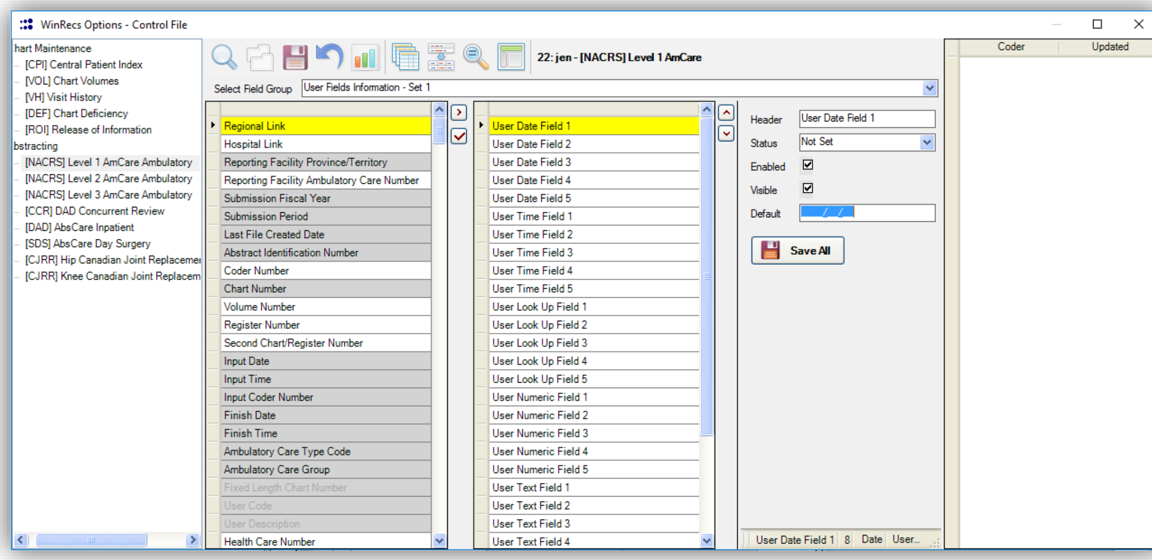


Figure 99 – User Defined Fields

- On the right hand side fill in the following:
  - `Header` – This is the name of the user field
  - `Status` – the drop down allows the user to assign the following options:
    - Not Set – there is not status assigned to the field
    - Hospital Required – the abstract will not be able to be saved if the field is blank
    - Hospital Error – the field will generate an error if left blank
    - Hospital Warning – the field will generate a warning if left blank
  - `Enabled` - when checked the user will be able to access the field in the abstract, not checked the user will not be able to access the field
  - `Visible` – when checked the user will be able to view the field in the abstract, not checked the user will not be able to view the field
  - `Default Value` – allows the user to default values into a field
- `User Look Up` fields will require the user to create the Look Up Values in **Look Up Code Maintenance.**

3. WinRecs Maintenance Menu

The WinRecs **Maintenance** Menu consist of three modules: `Look Up Code Maintenance`, `Provider Maintenance`, and `Project Maintenance`.

3.1 Look Up Code Maintenance

This feature is used to maintain the lookup tables. These tables contain values defined by CIHI, other provincial authorities or specific values used by the facility. In any WinRecs module, **[F2]** will access the look ups for any field that has an associated look up table.

To access the Look Up Code Maintenance screen

- Select **Maintenance → Look Up Code Maintenance**

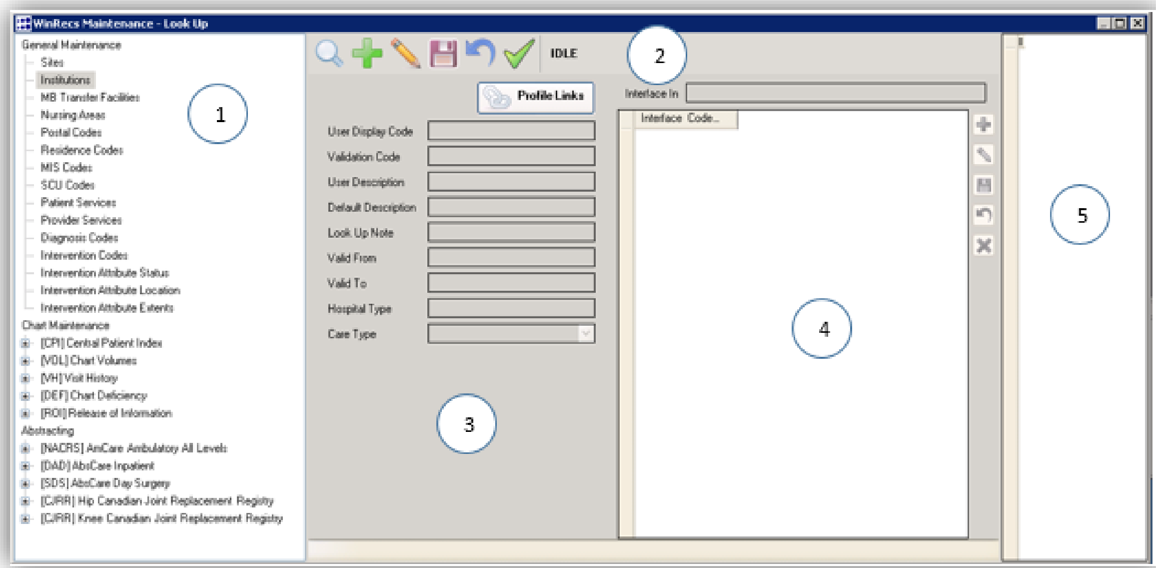


Figure 100 – Look Up Code Maintenance Screen

1. **Look Up Code Maintenance Modules** - Click on the Look up Table that needs adjusting. There are 3 main sections of the Look Up Code Maintenance
   - **General Maintenance** – These are the look up tables that are similar in all **WinRecs** Modules
   - **Chart Maintenance** – These are specific look up tables that are found in the specific **Chart Maintenance** Modules
   - **Abstracting** – There are specific look up tables that are found in the specific **Abstracting** modules.
2. **Toolbar –** **see Toolbar**
3. **Code Values**

- `Profile Links-` The ability to link a look up code to a region if there is more than one region in the database or link to a hospital if there is more than hospital. (Optional) Leaving it blank will show for all hospitals.
- `User Display Code` – The displayed value for the look up field
- `Validation Code` – The displayed value for the look up field
- `User Description` – The description of the code
- `Default Description` – The default description of the code (same as user description)
- `Look Up Note` – Additional description of the value if needed
- `Valid From` – The date the code is valid from
- `Valid To` – The date the code is valid to
  - `Interface Out` – Value used as region/hospital in interface populating out of WinRecs, populates with User Code.
- `Interface Out` – Value used as region/hospital in interfaces populating out of WinRecs, populate with the User Code.

4. **`Interface In`** – add the interface in values from your Batch and HL7 interfaces.
5. **`Update History`** – Displays the user(s) that made changes to the look up value.

To add a new code

1. Select, by clicking the desired code group in the Code List panel on the left hand side.
2. Click the on the toolbar.

   — or —
3. Press **[F5].**
4. Enter all of the required fields in the code editing panel on the right hand side.
5. Click the on the toolbar to save the new record.

   — or —
6. Press **[F7]**.

To edit an existing code

1. Select, by clicking the desired code group in the Code List panel (1).
2. Click the on the toolbar to display the search code screen.

   — or —
3. Press **[F4]** to display the search code screen.

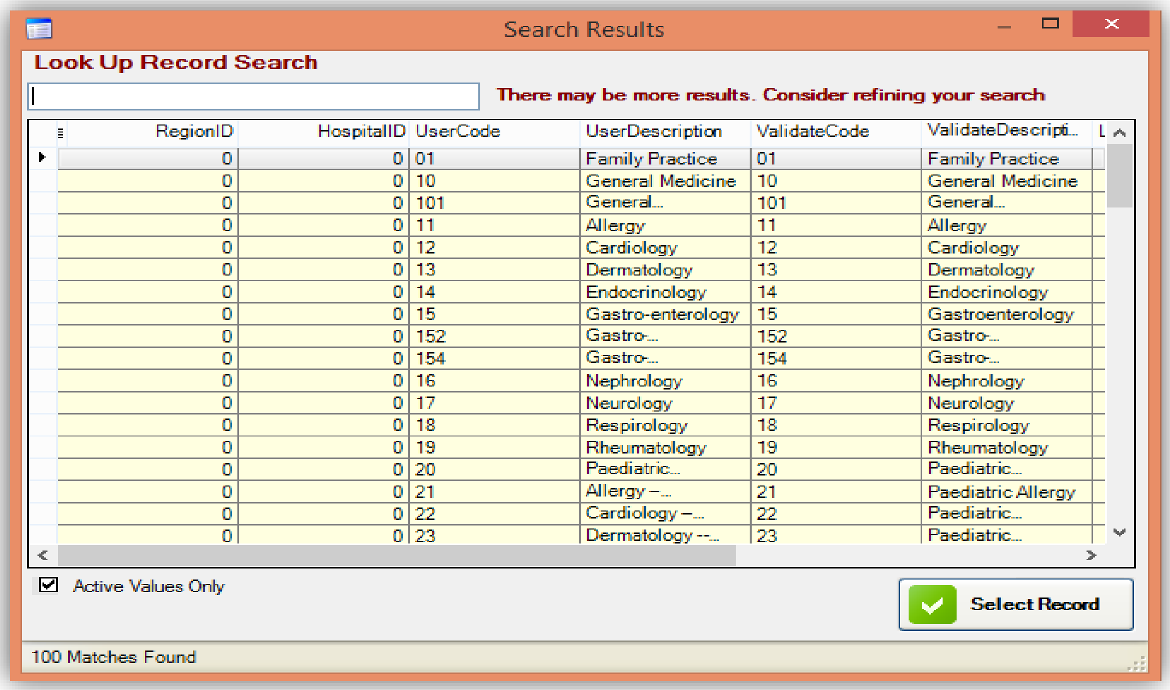


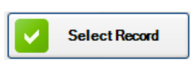
Figure 101 - Look Up Code Search

4. In the list, select the code that you need to modify.
5. Double click the desired code.

   — or —

6. Select the desired code, then press **[ENTER].**

   — or —

7. Select the desired code, then click .

Greyed out values cannot be changed. These fields are found throughout the Look Up Code Maintenance tables and are either WinRecs default fields/descriptions or fields that have been submitted to CIHI.

Once a Look Up Code has been saved, the Validation Code and Default Description cannot be changed. To change these fields, the current Look Up Code must be deactivated by resetting the Valid To Date and creating a new entry with the new values.

ICD-10 Diagnostic and Intervention Codes

There are limited fields that can be updated in the ICD-10 and CCI tables. The CIHI values are visible but not enabled and these fields cannot be changed. The user can only change the fields that are visible and enabled.

Edits for Diagnosis and Intervention codes can be viewed in the Look Up. For example, gender and age from and to.

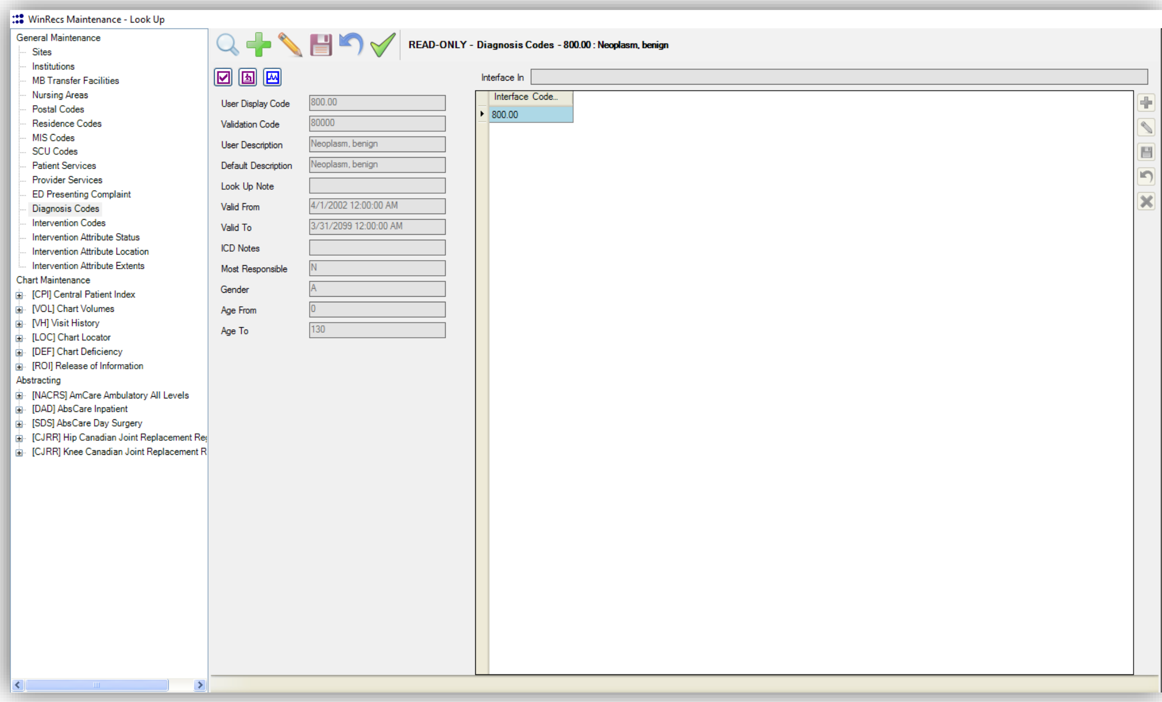


Figure 102 - Diagnostic and intervention Codes

The Diagnostic and Intervention windows in the Lookup Maintenance have 3 additional buttons that allow Diagnosis, Intervention and Projects to be linked. Linking of more than one Diagnosis, Intervention or Project can be done.

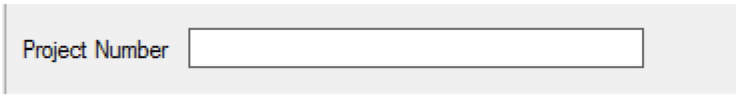
	Project Link -when selected a popup window with the list of Projects that can be linked to the Diagnosis or Intervention code that is being edited
	Diagnosis Codes - when selected a popup window with the list of Diagnosis Codes that can be linked to the Diagnosis or Intervention code that is being edited
	Intervention Codes - when selected a popup window with the list of Intervention Codes that can be linked to the Diagnosis or Intervention code that is being edited

Table 11 – Project, Diagnostic and Intervention Buttons

- The following example will display how to link a diagnosis code to a project
    - WinRecs Maintenance – Look Up/General Maintenance/Diagnosis Codes
    - Search for ‘I64, Stroke, not specified as haemorrhage’
    - Press Edit
    - Press the Project icon

Figure 103 - Diagnostic and intervention Codes

- Press the new button
- Click in the Project Number Box and Press **[F2]** or type in the Project number



- From the list of projects double click or highlight and press Select Record

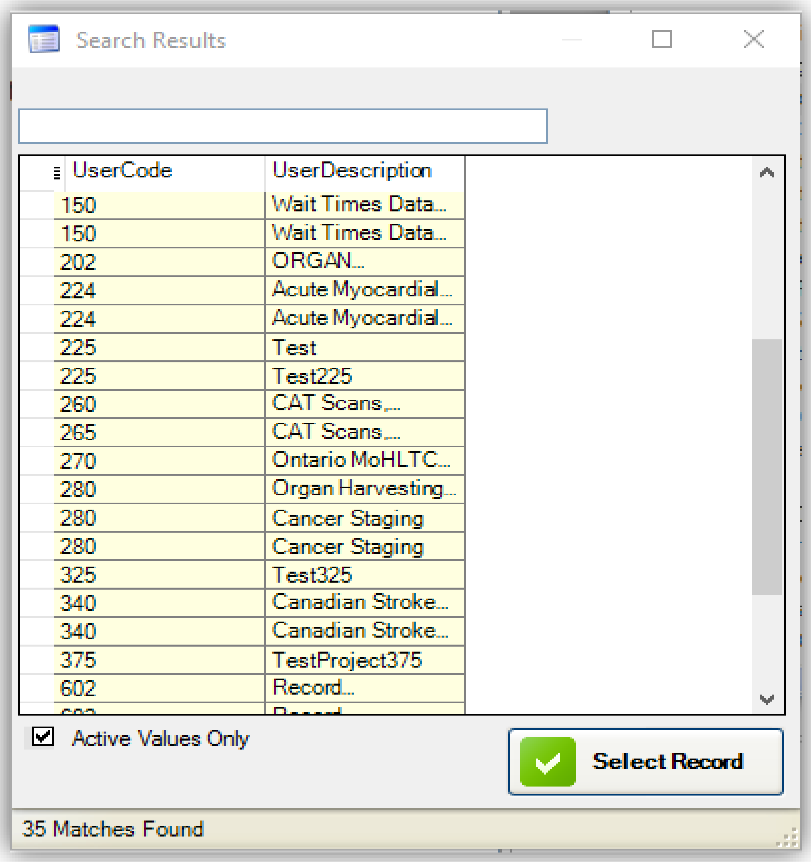


Figure 104 – Linking Project to Diagnosis Code

*Please note the button for Active Value Only, if checked it will only display active projects, uncheck will display all active and inactive projects.

- Press the Save button
- To edit the project press the
- To cancel any changes press the
- To delete a project press the

3.2 Provider Maintenance

The provider maintenance module is used to add or revise information for a facility's physicians and other providers. Providers may be added, modified and deactivated as required.

To access the Provider Maintenance screen

Select **Maintenance** → **Provider Maintenance**.

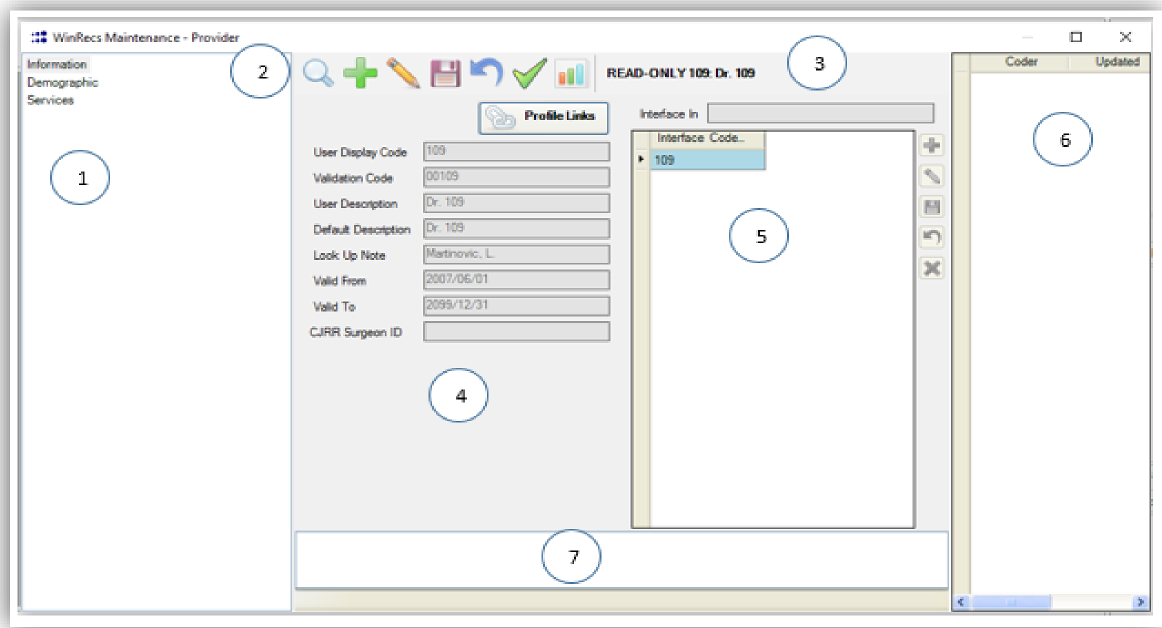


Figure 105 - Provider Maintenance screen

1. Provider List panel
   - `Information` – is the display information for the provider
   - `Demographic` – the demographic information for the provider
   - `Services` – Lists the provider service/speciality for the provider, may enter more than one.
2. Toolbar – see Toolbar
3. Provider identifier – Displays the provider being modified or entered. If new, will display 'NEW', if no provider chosen will display 'EDIT'
4. Editing panel – Displays the fields that can be modified for the selected provider.
5. Interface Value – Allows linking an interface value with a provider.
6. Update History – Displays the user(s) and date/time who have created or updated the provider.
7. Messages – displays a message of any fields that need to be entered, the fields will disappear as they are filled in

To add a new provider

1. Click the on the toolbar or Press **[F5].**
2. Select the Information Panel
3. Enter all of the required fields in the Editing panel (4).

Provider Maintenance Information Screen

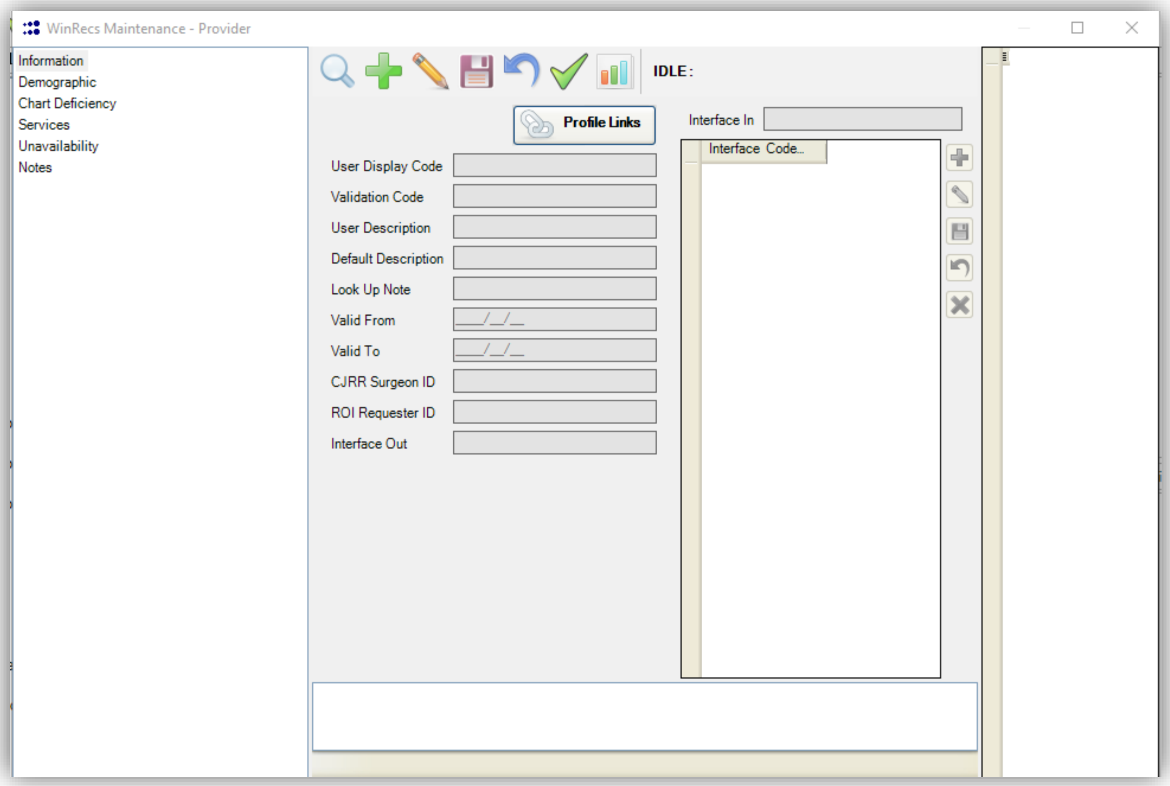


Figure 106 - Provider Maintenance - Information screen

- `Profile Links` – the ability to assign a provider to a region from the dropdown list or from the available hospital(s). (Optional) Leaving it blank will show for all regions and hospitals.
- `User Display Code` – The provider number
- `Validation Code` – Same as User Display Code
- `User Description` – The provider name
- `Default Description` – The same as User Description
- `Look Up Note` – Additional Description of the value or rules for use
- `Valid From` – Date when the provider became active.
- `Valid To` – Date when the provider became invalid.
- `CJRR Surgeon ID` – The surgeon ID as assigned by CIHI for CJRR.

- Interface Out – Value used as region/hospital in interface populating out of WinRecs, populates with User Code.

Provider Maintenance Demographic Screen

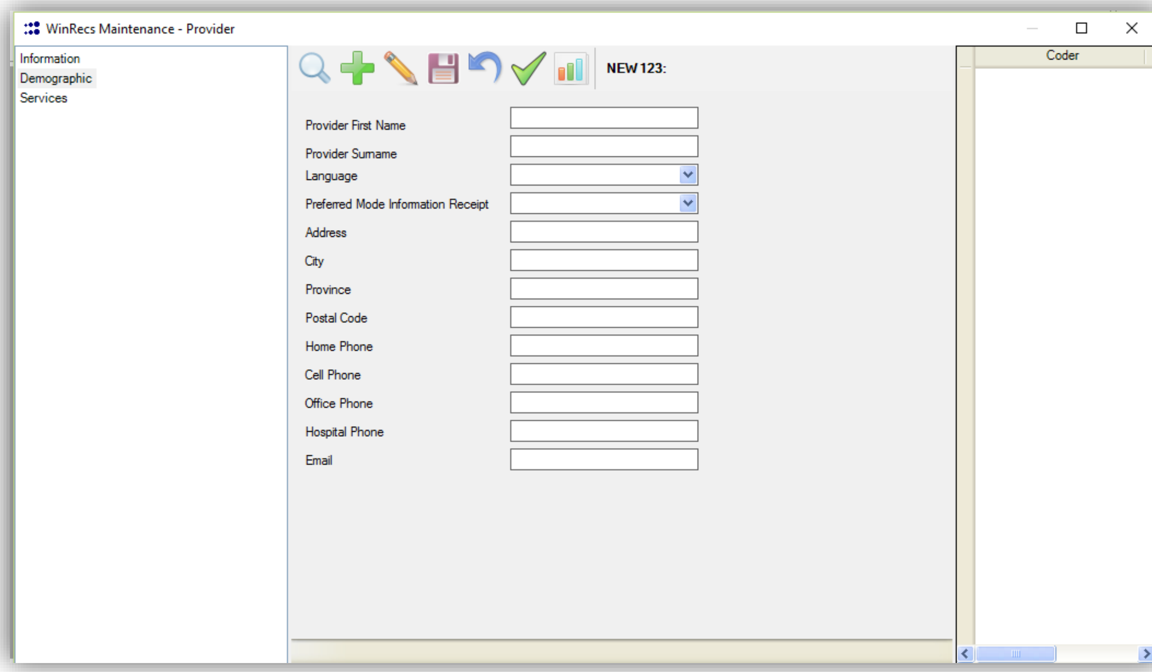
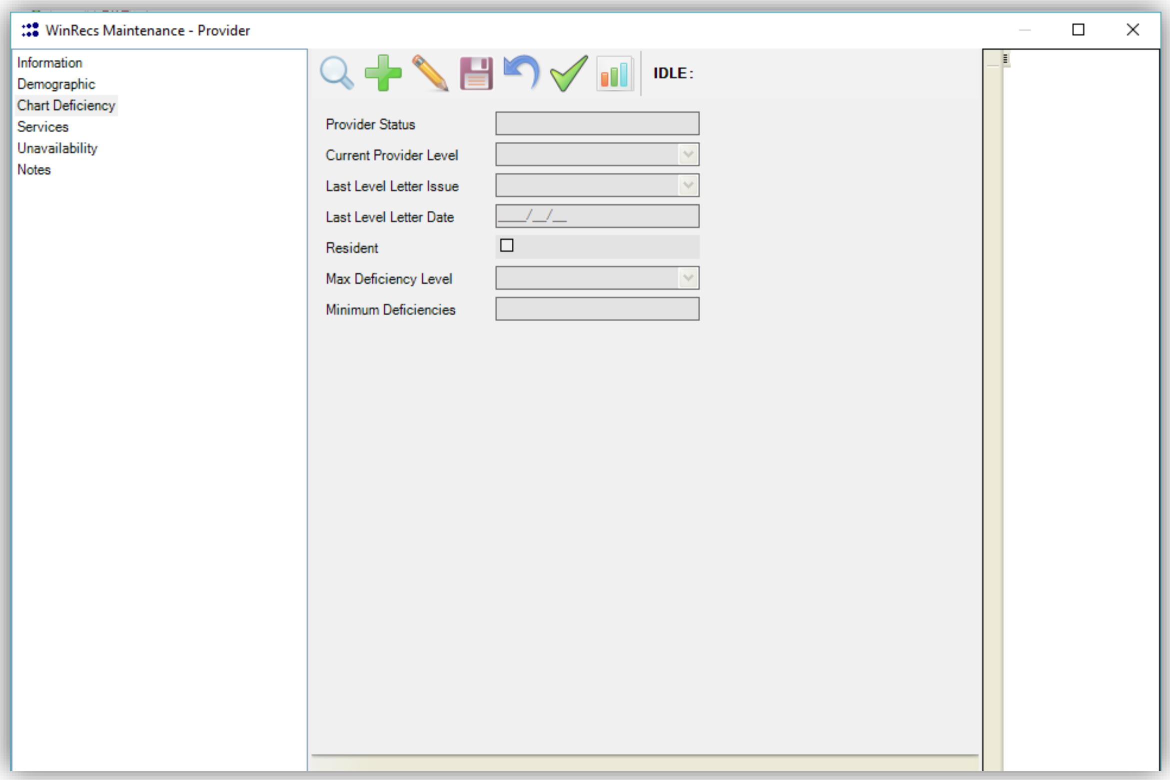


Figure 107 - Provider Maintenance – Demographic screen

The demographic information is not mandatory and depends on the site and modules using on how much or little is filled in.

- Provider First Name – The provider first name
- Provider Surname – The provider last name
- Language – Drop down of the language preferred
- Preferred Mode Information Receipt – Email/Fax/Postal Mail
- Address – The provider address
- City – The provider city
- Province – The provider province
- Postal Code – The provider postal code
- Home Phone – The provider home phone
- Cell Phone – The provider cell phone
- Office Phone – The provider office phone
- Hospital Phone – The provider hospital phone
- Email – The provider email

Provider Maintenance Services Screen



- `Provider Status` – Status of Provider – A (Active) or I (Inactive), populated from the Provider Status field in the Chart Deficiency module.
- `Current Provider Level` – Provider Level is the level of deficiency the provider is at and what letter they will receive next. The level is determined by the site.
- `Last Level Letter Issued` – The last letter the provider received
- `Last Level Letter Date` – The date last letter was sent out
- `Resident` – A check mark indicates if the provider is a resident
- `Max Deficiency Level` – Indicates the maximum letter level the provider will receive
- `Minimum Deficiencies` – The minimum level of deficiencies that will generate a letter.

Provider Maintenance Services Screen

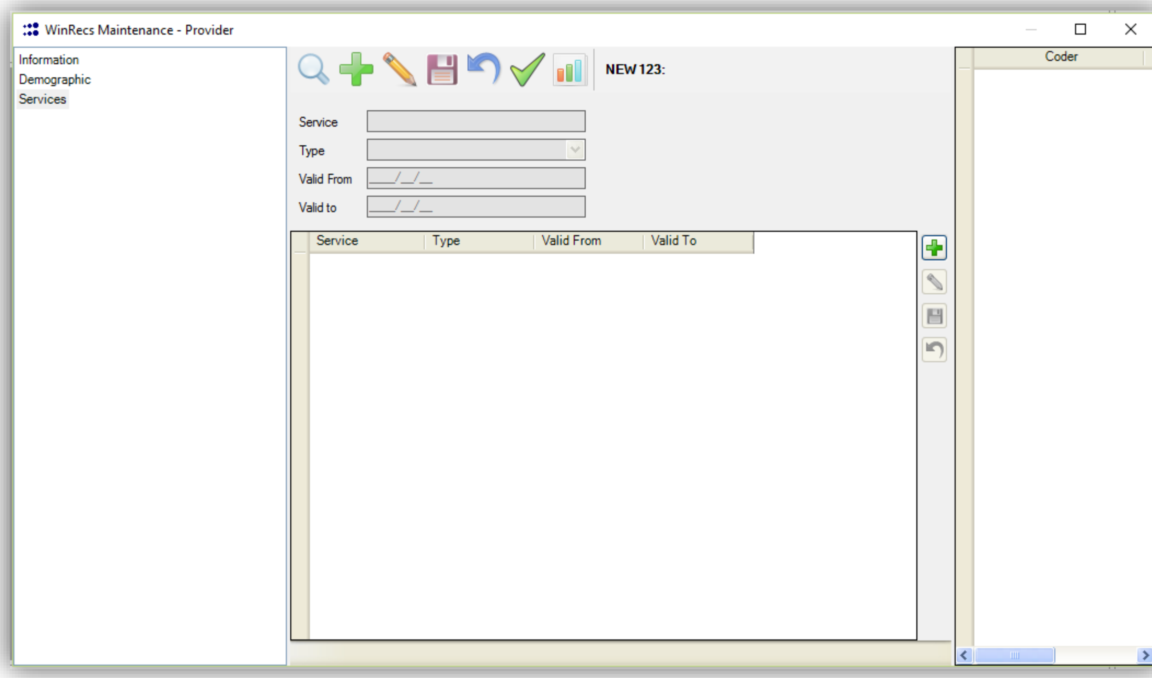


Figure 108 - Provider Maintenance – Services screen

Each provider needs a **Service (Inpatient/SDS)** and/or **Speciality (NACRS)**

- To add, press the  to add the speciality
- The **Service** will open, enter the Service/Speciality number or press **[F2]** to show the list of Service/Speciality numbers
- Enter the Valid From Date – the date the service is valid
- Enter the Valid To Date – the date the service is invalid
- Once added, press the 
- If you need to delete the service/speciality, press the 
- Click the  on the toolbar to save the new record.

  — or —

  Press **[F7]**.

Changes to Provider Maintenance will not appear till the user logs out and back into WinRecs

To edit an existing provider

- Select, by clicking the desired group in the Provider List panel (1).
- Click the on the toolbar to display the search screen.

  — or —
- Press **[F4]** to display the search screen.

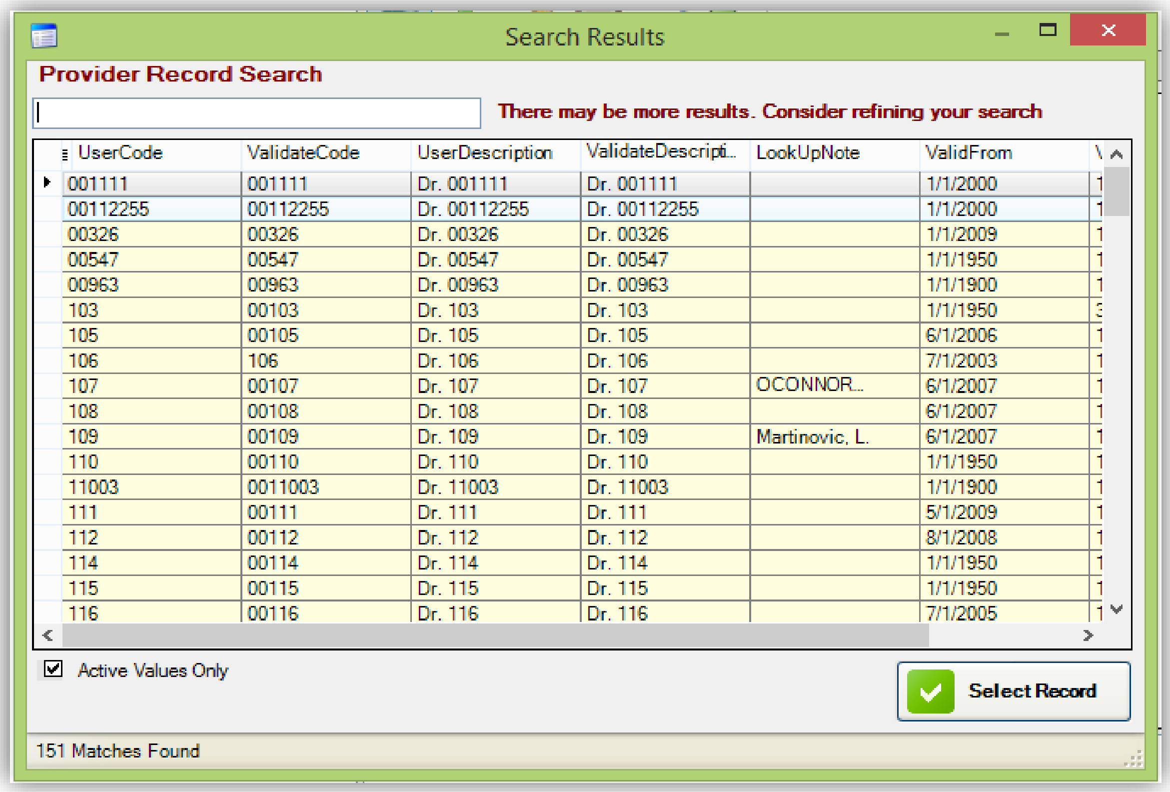
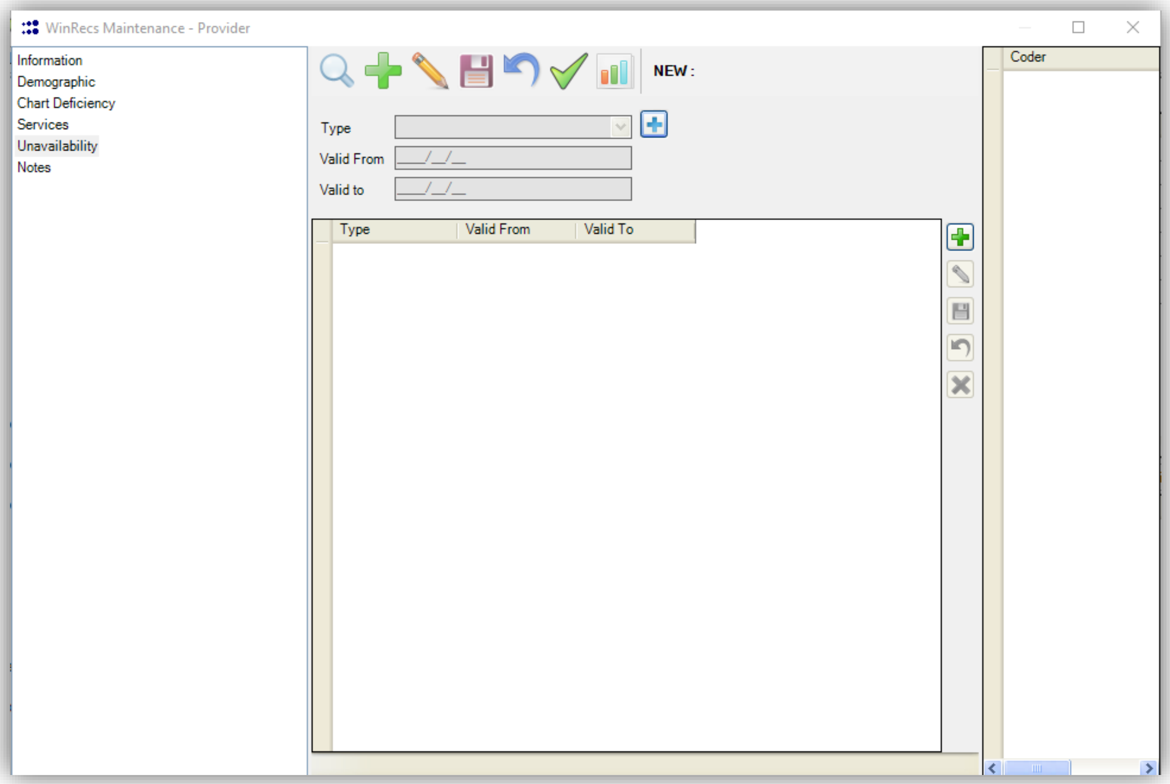


Figure 109 - Provider search

- In the list, select the provider that you need to modify or type in **user code** or **name**
- Double click on the desired provider.

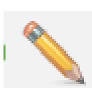
  — or —
- Select the desired provider, then press **[ENTER].**
- Select the desired provider, then click Select Record
- Press to edit the provider information
- On the Services screen to edit an existing Service or Speciality, press the , this will open up the Service & Valid To and From Dates to make any changes.

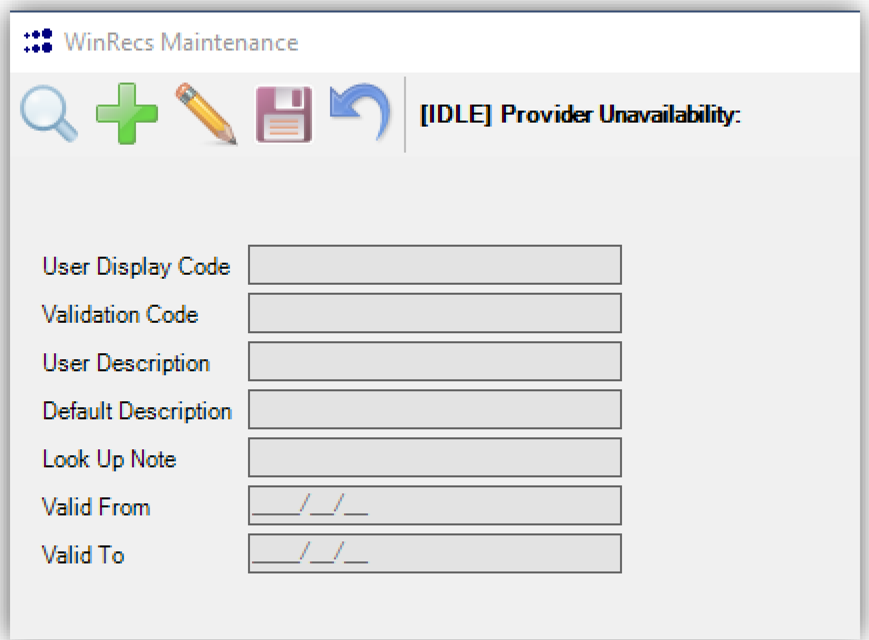
Provider Maintenance Unavailability Screen

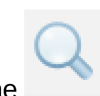
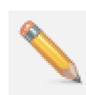


If a Provider is away for a certain period of time, the Unavailability Screen would be populated. This will also stop the counting of deficient charts.

To enter the Unavailability:

1. Press the  or [F6]
2. Type: Choose the drop down or type the display code of the type
   - To create the type, press the  and the following window will display



- To search for an existing Type press the  or [F4]
- To edit an existing Type press the  or [F6]
- To create a new Type press  or [F5] and populate the fields
  - User Display Code – the display code for that type
  - Validation Code – will populate with the User Display code (once saved this field cannot be edited)
  - User Description – the user description of the Type
  - Default Description – will populate with the User Description (once saved this field cannot be edited)
  - Look Up Note – can be populated if a note is preferred
  - Valid From – the date the Type is available
  - Valid To – the date the Type ends
  - Press  or [F7] to save.

3. Valid From – enter the start date the provider is not available
4. Valid To – enter the end date the provider is not available.

3.3 Project Maintenance

This feature is used to create and maintain Projects.

To access the Project Maintenance screen

Select **Maintenance → Project Maintenance**.

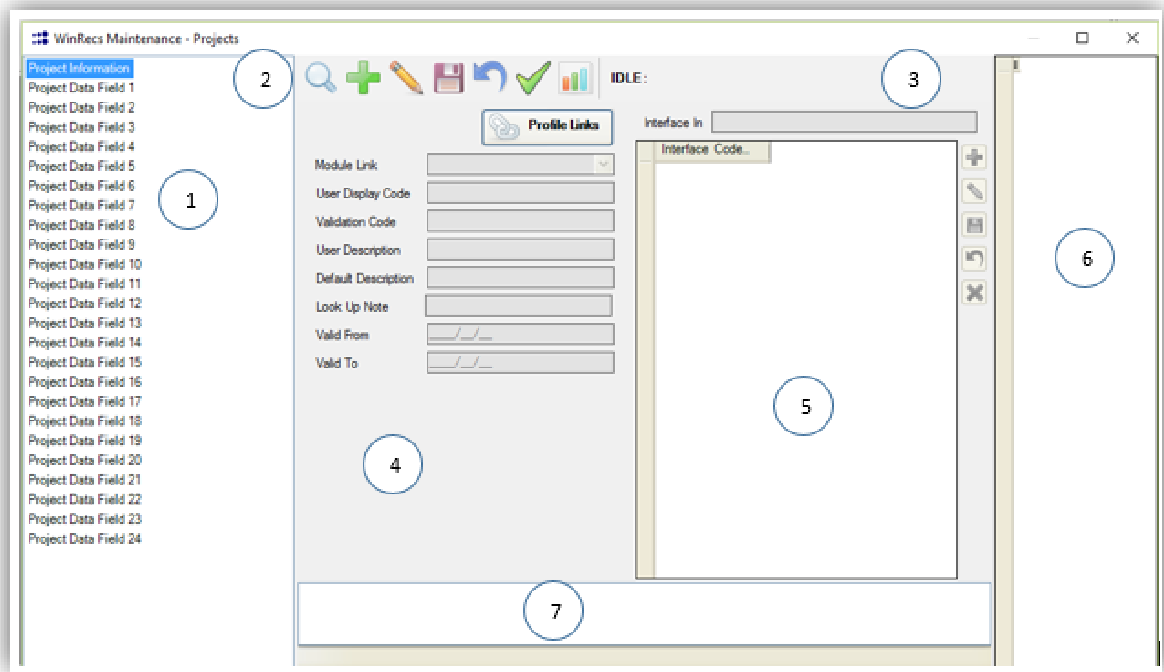


Figure 110 - Project Maintenance Screen

1. Project Information and Project Data Panel – Lists the Project Information and Project Data Fields for each project.
2. Toolbar – see Toolbar
3. Project identifier – Displays the identifier of the project being viewed, will show IDLE if no project shown and NEW to create a new project.
4. Editing panel – Displays the fields that can be modified for the selected project.
5. Interface Value – Allows linking an interface value with a project.
6. Update History – Displays the user(s) who have made any changes to the Project.
7. Messages – displays a message of any fields that need to be entered, the fields will disappear as they are filled in

To add a new project

- Click the  on the toolbar.

— or —

- Press **[F5].**
- Click on `Project Information` in the Project Information panel (1). This will create the Project Number, Project Name and Valid From and To Date

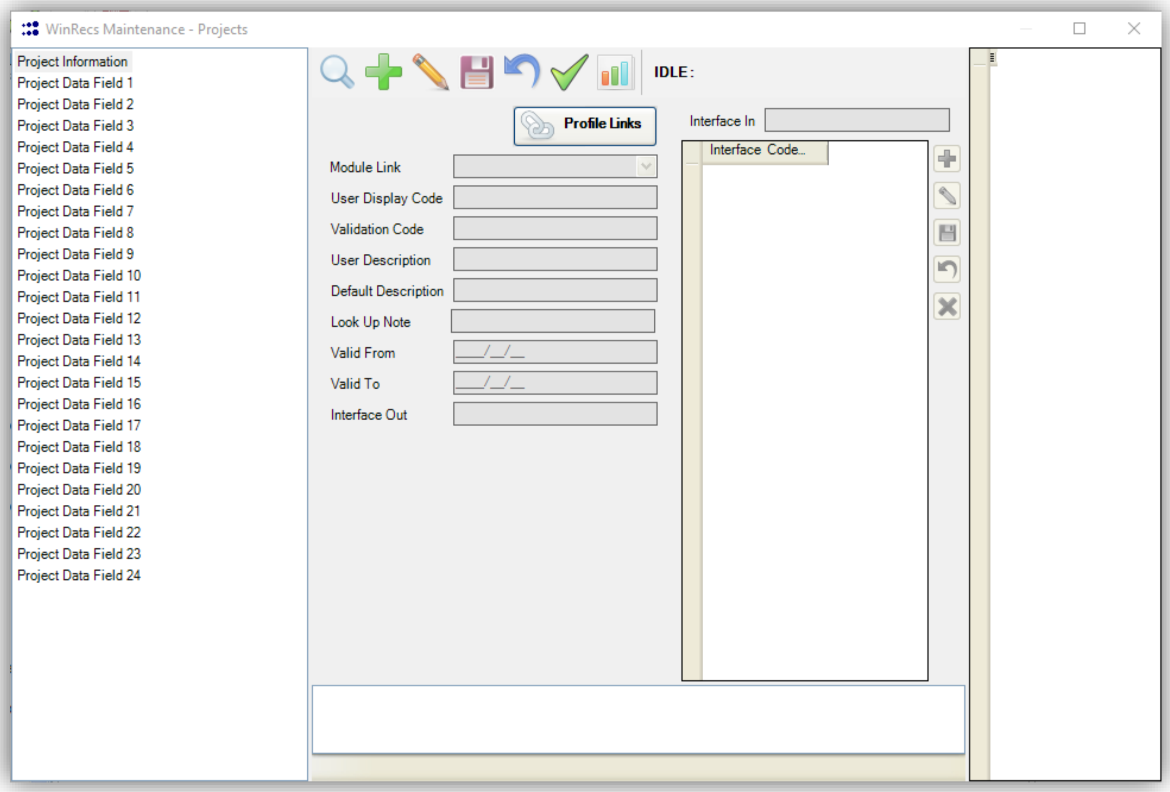


Figure 111 - Project Maintenance Screen

- `Profile Links` – the ability to assign a project to a region or hospital(s). Leaving it blank will show for all regions and hospitals. (Optional)
- `Module Link` – can assign the project to a specific module
- `User Display Code` – The project number
- `Validation Code` – The same number as the User Display Code
- `User Description` – Name of the Project
- `Default Description` – Same as User Description
- `Look Up Note` – Additional description of the value or rules for use
- `Valid From` – The date the project is valid
- `Valid To` – The date the project is no longer valid
- `Interface Out`– Value used as region/hospital in interface populating out of WinRecs, populates with User Display Code.

- o `Interface In` – This will allow any Interface In values to come across the Batch Interface or HL7 feed.
- o Click on `Project Data Field 1` in the Project Information panel.

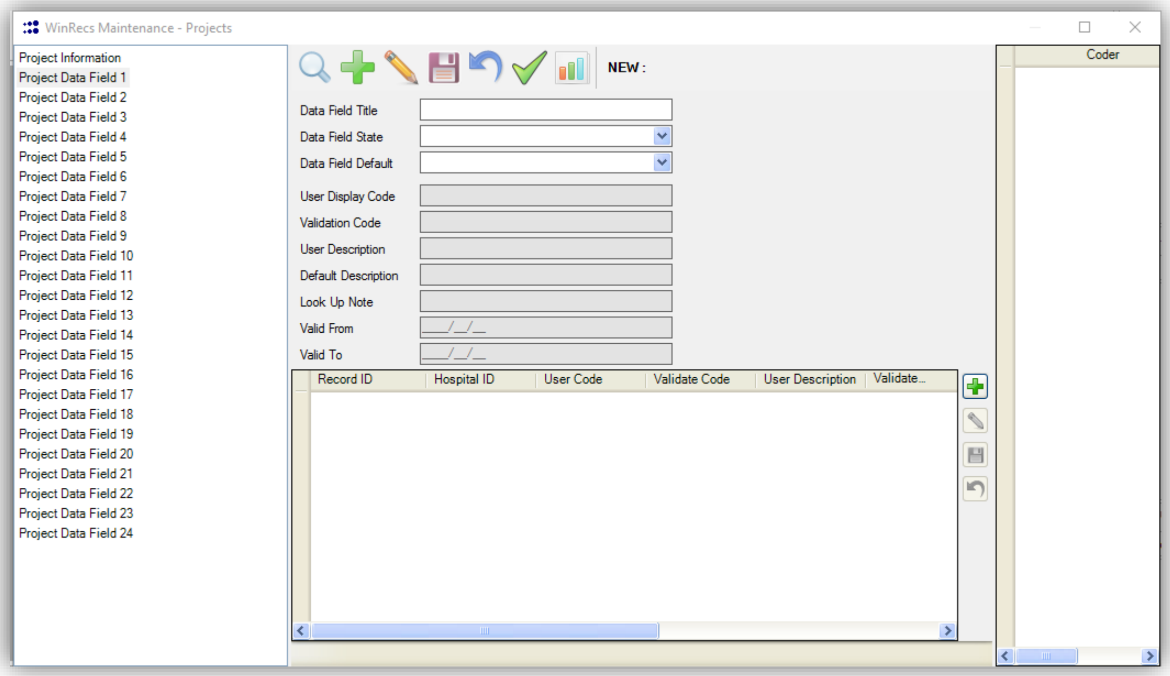


Figure 112 - Project Maintenance – Project Data Field

- o `Data Field Title` – The Project Field Name
- o `Data Field Status`:
  - `X – Closed/Disabled` – The project is not being collected
  - `O- Open/Submitted` – The project is available and is submitted to CIHI
  - `W- Warning` – A warning will display if the field is not filled out
  - `E – Error` – An error will display if the field is not filled out
  - `C- Critical Error` – A critical error will display if the field is not filled out and the abstract will not be saved
- o `Data Field Default` – The ability to add a default, depending on the Project Data Field, it will be a look up (drop down and will appear after the display code are created see below) or free text.
- o To add a display code or codes, press the  to enter the following:
  - `User Display Code` – the code for the value
  - `Validation code` – Same as the `User Display Code`
  - `User Description` – The description of the code

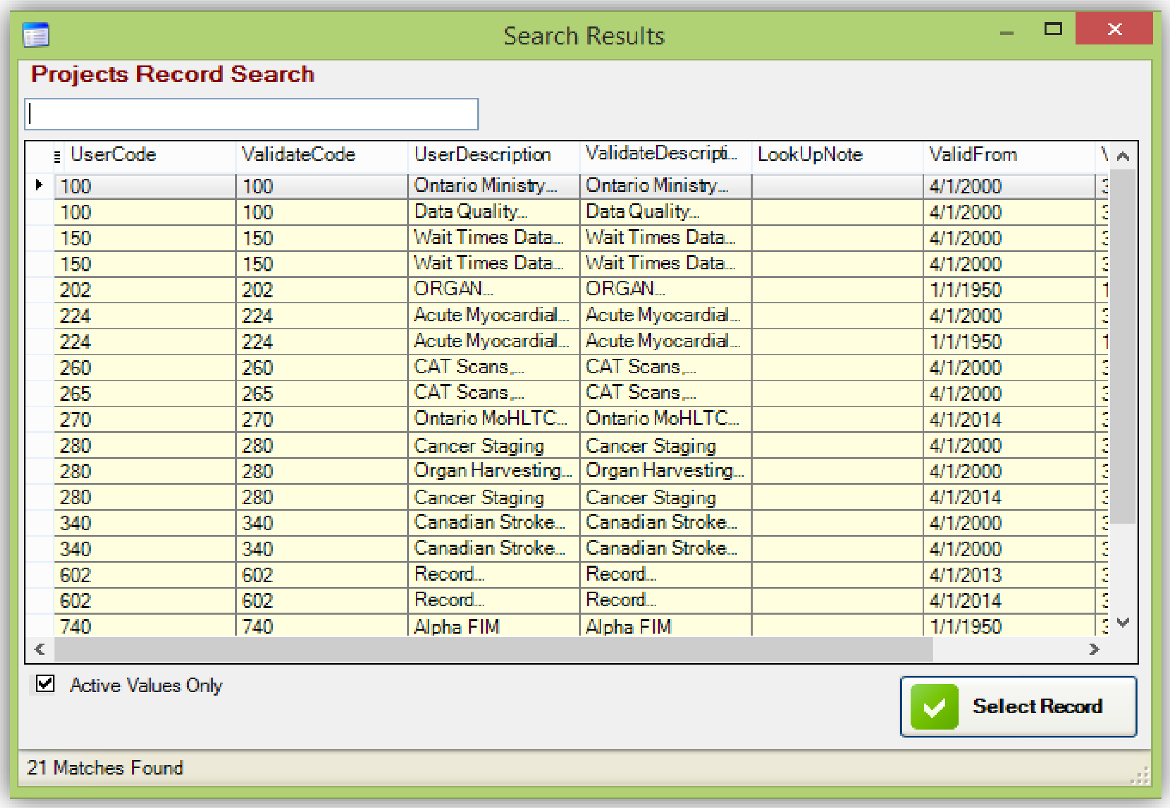
- `Default Description` – Same as the `User Description`.
  - `Look Up Note` - Additional description of the value or rules for use
  - `Valid From` – The date the code is valid
  - `Valid To` – The date the code is no longer valid
- Click the on the toolbar to save the new record.

  – Or —
- Press **[F7]**
- To delete the display code, press the or **[F9]**

To edit an existing project

- Click the on the toolbar to display the search screen.

  — or —
- Press **[F4]** to display the search screen.



UserCode	ValidateCode	UserDescription	ValidateDescripti...	LookUpNote	ValidFrom
100	100	Ontario Ministry...	Ontario Ministry...		4/1/2000
100	100	Data Quality...	Data Quality...		4/1/2000
150	150	Wait Times Data...	Wait Times Data...		4/1/2000
150	150	Wait Times Data...	Wait Times Data...		4/1/2000
202	202	ORGAN...	ORGAN...		1/1/1950
224	224	Acute Myocardial...	Acute Myocardial...		4/1/2000
224	224	Acute Myocardial...	Acute Myocardial...		1/1/1950
260	260	CAT Scans,...	CAT Scans,...		4/1/2000
265	265	CAT Scans,...	CAT Scans,...		4/1/2000
270	270	Ontario MoHLTC...	Ontario MoHLTC...		4/1/2014
280	280	Cancer Staging	Cancer Staging		4/1/2000
280	280	Organ Harvesting...	Organ Harvesting...		4/1/2000
280	280	Cancer Staging	Cancer Staging		4/1/2014
340	340	Canadian Stroke...	Canadian Stroke...		4/1/2000
340	340	Canadian Stroke...	Canadian Stroke...		4/1/2000
602	602	Record...	Record...		4/1/2013
602	602	Record...	Record...		4/1/2014
740	740	Alpha FIM	Alpha FIM		1/1/1950

Figure 113 - Project search

- In the list, select the project that you need to modify.
- Double click the desired project.

— or —

- Select the desired project, then press **[ENTER].**

  — or —

- Select the desired project, then click .
- Click on the  on the top tool bar
- In the Project Data Field click on the  on the right-hand side tool bar to edit the display codes.

3.4 Report Maintenance

This feature allows user to setup Reports to be printed in specified modules and/or to Schedule automatic reports.

To access the Report Maintenance screen

Select **Maintenance** → **Report Maintenance**.

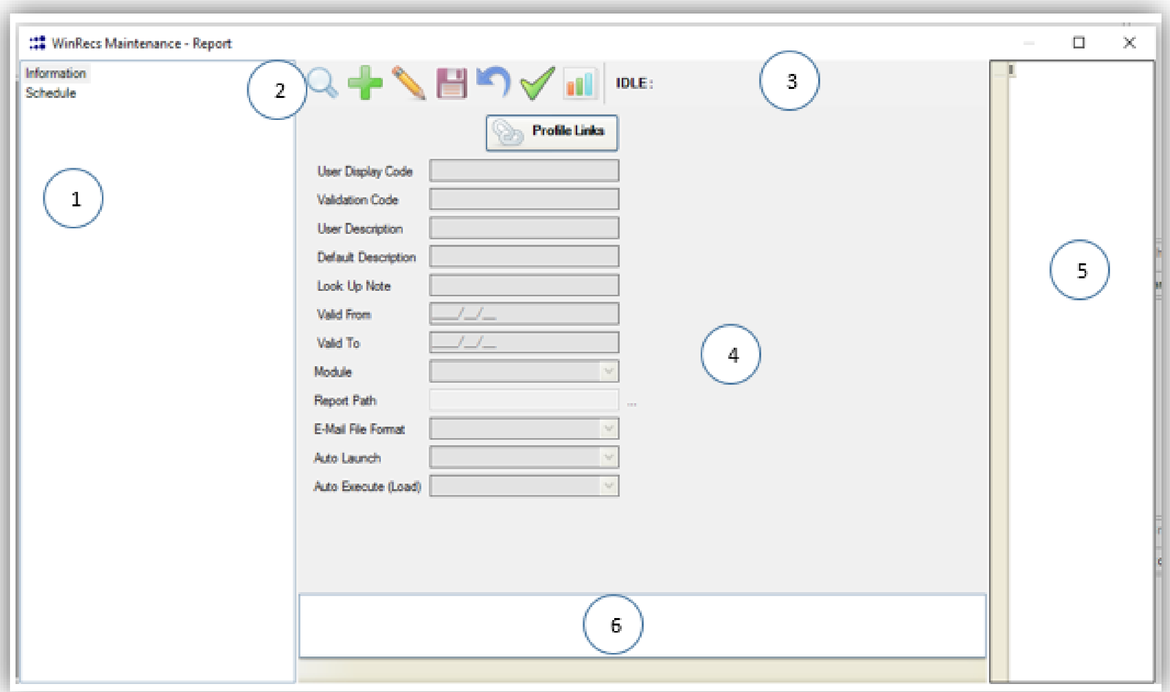


Figure 114 – Report Maintenance Screen

1. Report Information and Schedule Panel – Lists the Report Information and Schedule for each report
2. Toolbar – see Toolbar
3. Report identifier – Displays the identifier of the project being viewed, will show IDLE if no project shown and NEW to create a new project.
4. Editing panel – Displays the fields that can be modified for the selected scheduled report
5. Interface Value – Allows linking an interface value with a project.
6. Update History – Displays the user(s) who have made any changes to the Project.
7. Messages – displays a message of any fields that need to be entered, the fields will disappear as they are filled in

Information

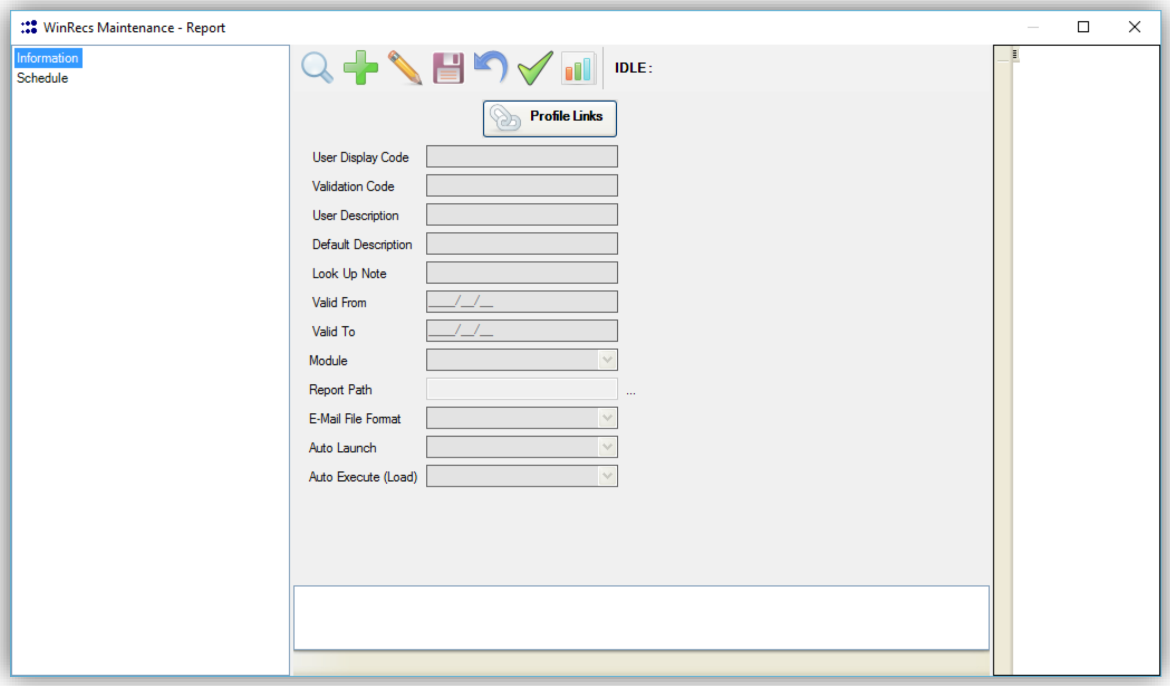
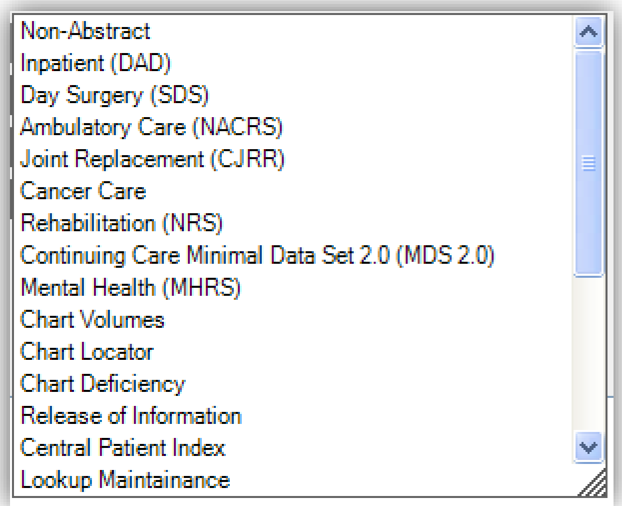
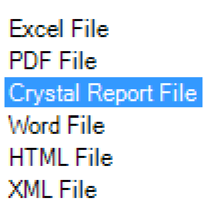


Figure 115 – Report Maintenance – Information Screen

- `Profile Links-` The ability to link a look up code to a region if there is more than one region in the database or link to a hospital if there is more than hospital. (Optional) Leaving it blank will show for all hospitals.
- `User Display Code` – Displayed abbreviated name of the report
- `Validation Code` – Displayed the name of the report
- `User Description` – The description of the report
- `Default Description` – The default description of the report
- `Look Up Note` – Additional description if needed
- `Valid From` – The date the report is valid from
- `Valid To` – The date the report is valid to
- `Module` – Select the Module from the drop-down list



- `Report Path` – Enter the name of the Report.
- `E-Mail File Format` – Select the format from the drop-down list



- `Auto Launch` – Select Yes and when the user saves a record this will automatically launch the reports
- `Auto Execute (Load)` – Select Yes and when the user selects a record this will automatically launch the reports

Schedule

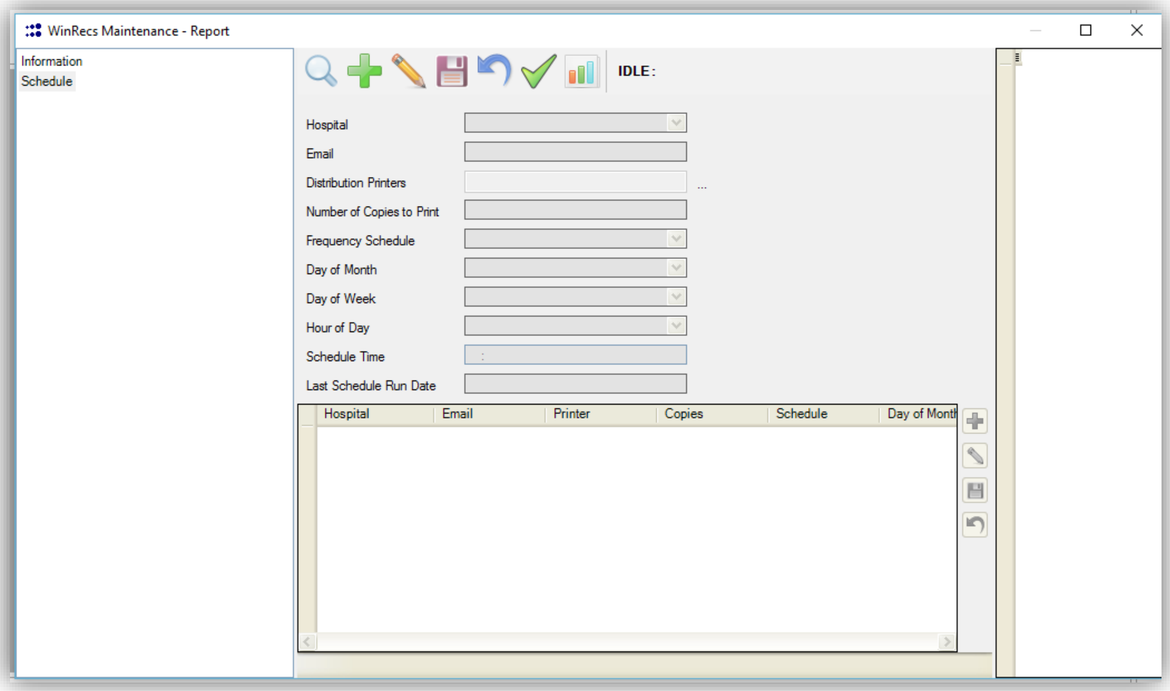


Figure 116 – Report Maintenance –Schedule Screen

- `Hospital` – Select the Hospital from the drop-down list
- `Email` – Type the recipient's email address, if required
- `Distribution printer` – Specify the printer where the report will be sent
- `Number of Copies to Print` - Type a number from 1-99 for the number of copies to be printed
- `Frequency Schedule` – Select the frequency type from the drop-down list

  Daily
  Weekly
  BI-Weekly
  Monthly
  Hourly
- `Day of Month` – Select the when in the Month it is to be printed from the drop-down list

  The First Day of Month
  The Last Day of Month
  The Middle Day of Month
- `Day of Week` – Select the day from the drop-down list

  Monday
  Tuesday
  Wednesday
  Thursday
  Friday
  Saturday
  Sunday
- `Hour of Day` – From the drop-down list select the frequency the report is to be printed

  Every one hour
  Every two hours
  Every four hours
  Every six hours
  Every eight hours
  Every twleve hours
- `Schedule Time` – Time in which the report will run
- `Last Schedule Run Date` – Specify the last date for this report to run

Schedule Toolbar

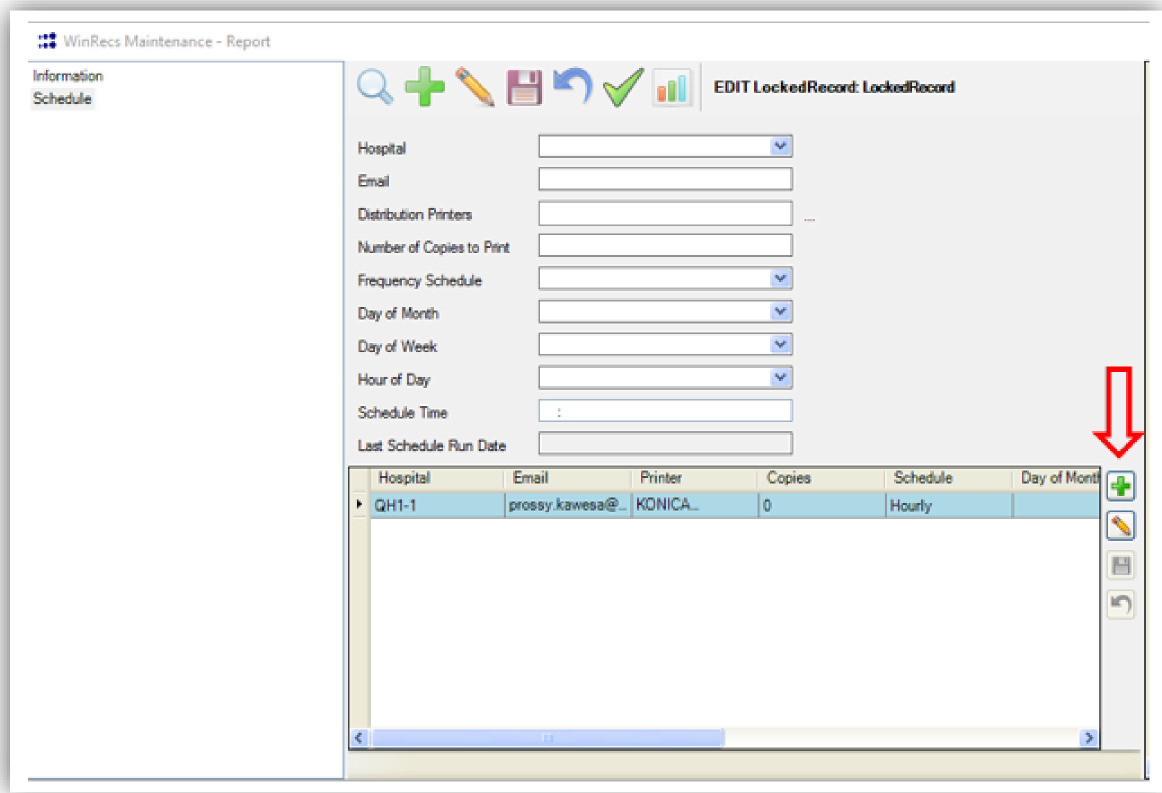
Detailed description of each icons functionality and shortcut key.

	Insert Occurrence	Allows user to insert a new occurrence	**[F4]**
	Edit Occurrence	Allows user to edit the occurrence	**[F5]**
	Keep Occurrence	Saves the occurrence	**[F6]**
	Cancel Occurrence	Cancels changes made to occurrence since the previous save.	

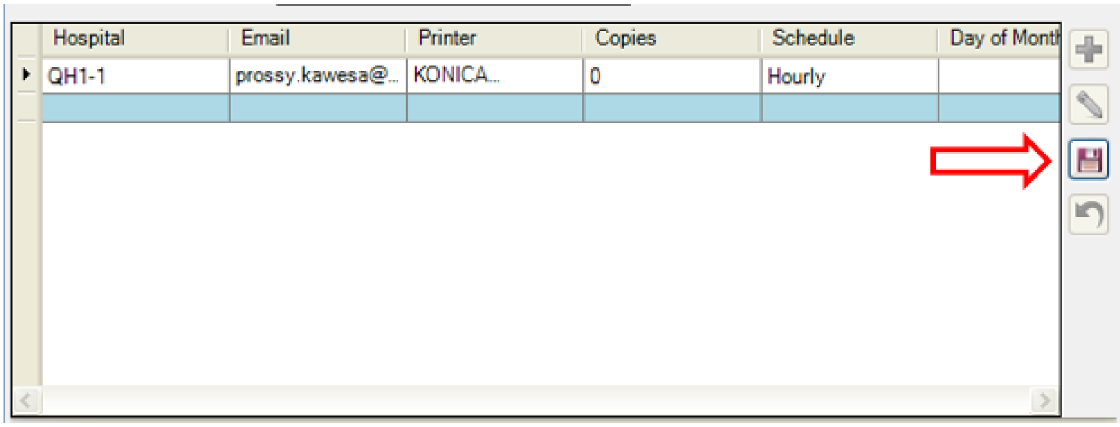
Table 12 - Reports - Schedule Toolbar

To add a new report.

- Click the on the toolbar or press **[F5].**
- Click on `Information` in the Report Information panel.
- The following fields must be entered for each report: User Display Code, Validation Code, User Description, Valid From and To Date, Report Path
- To create a report for Report Manager in a specified module the following fields may be populated: Module, Email File Format, Auto Launch and Auto Execute
- To create a report for Scheduler click on `Schedule` in the Report Information Panel
- Click on the in the Schedule tool bar



- Populate the fields that will pertain to how the report will be scheduled.
- Press the save button in the Scheduler Tool Bar



- Press Save or Press  or **[F7]** to save all changed (in upper tool bar)

To edit a report.

- Click the  on the toolbar to display the search screen or press **[F4]** to display the search screen.

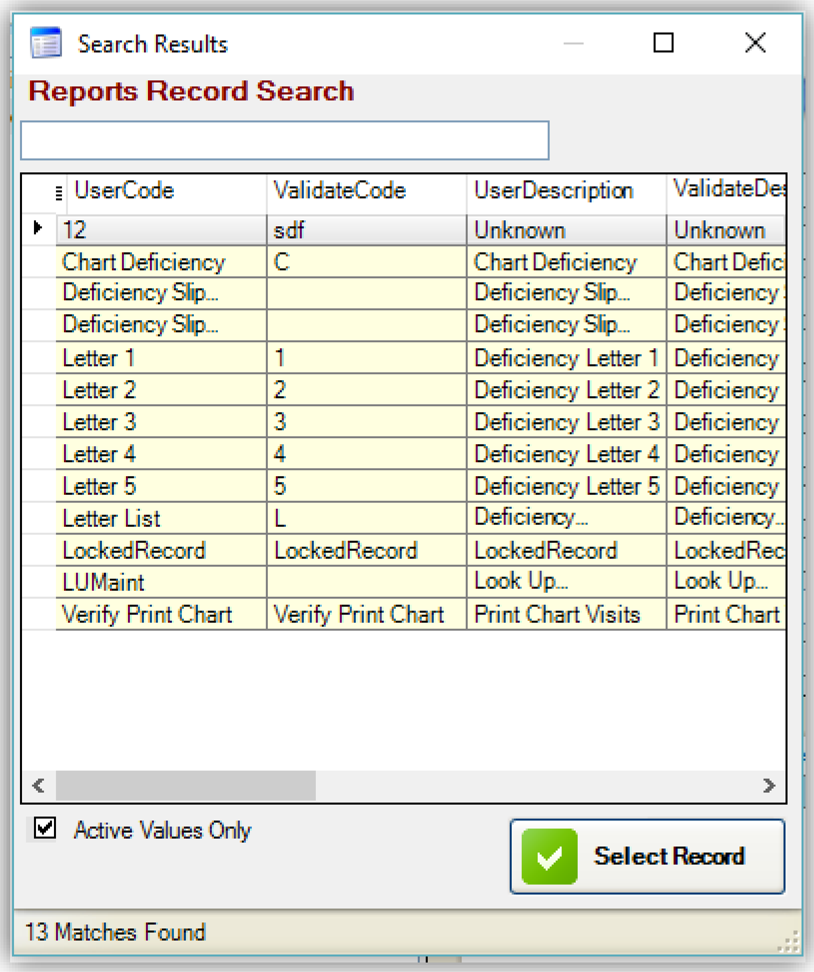


Figure 117 - Provider search

- Under Reports Record Search, enter the report name to pull it up or scroll through the reports
- Double click the desired report.

  — or —
- Select the desired report, then press **[ENTER].**

  — or —
- Select the desired provider, then click 

- Press  or **[F6]** to edit the report
- On the Schedule screen to edit an existing scheduled report, click on the schedule to be edited and press the  on the schedule toolbar.

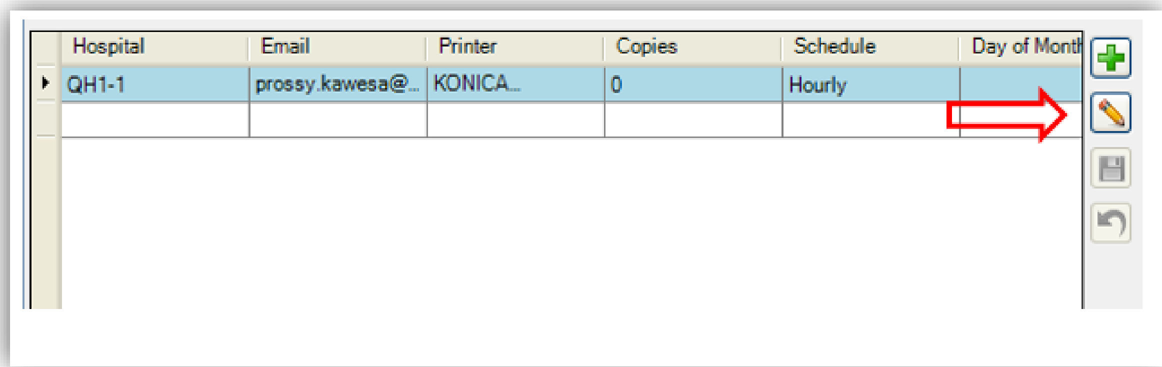


Figure 118 – Editing existing schedules

- The schedule fields will be editable.

3.5 Auto Batch Interface

This feature is used to automate the Batch Interface processes. Please notice that Batch Interfaces are custom built. If you have any questions regarding this process, contact a MED2020 Client Services Representative. Contact information is available above in the section 'Contact MED2020'.

> **The Auto Batch can be set up from the workstation but the files and the folder that they are to be located in must reside on the network drive and not on the client machine.**

To access the Auto Batch Interface Maintenance screen

Select **Maintenance → Auto Batch Interface Maintenance**

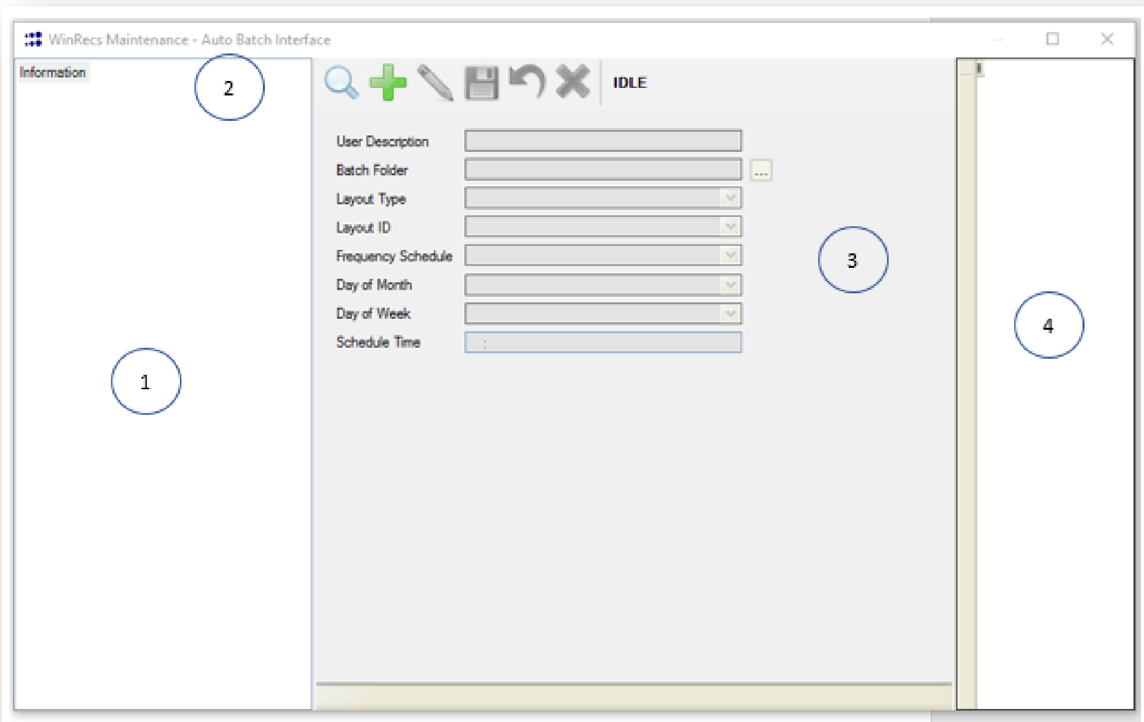


Figure 119 – Auto Batch Interface

1. Information– Lists the Information that needs to be entered for the Auto Batch to work.
2. Toolbar – see Toolbar
3. Editing panel – Displays the fields that can be modified for the Auto Batch.
4. Update History – Displays the user(s) who have made any changes to the schedule entry.

- `User Description` – The description of the Batch to run
- `Batch Folder` – The name of the directory (path) where the Batch Interface file will be located <u>on the Server</u>. Use the button to find the path if you need.
- `Layout Type` – Indicates which Batch Interface is for. There are mainly 2 types:
  - Standard Batch In (Fixed Length)
  - Custom Batch In
- `Layout ID` – Indicates which Batch Interface is for. This field only apply for Custom Batch In types.
- `Frequency Schedule` – Select the frequency type from the drop-down list: Daily, Weekly or Monthly.
  - *Daily* – it will require a time to be entered
  - *Weekly* – it will require a Day of Week and time to be entered
  - *Monthly* – From the Day of the Month drop-down list select between: The First Day, The Last Day or the Middle Day of the month, then enter the time to be run it.
- `Day of Month` – Select the when in the Month it is to be printed from the drop-down list

  The First Day of Month
  The Last Day of Month
  The Middle Day of Month

- `Day of Week` – Select the day from the drop-down list

  Monday
  Tuesday
  Wednesday
  Thursday
  Friday
  Saturday
  Sunday

- `Schedule Time` – Time in which the report will run

Auto Batch Service will pick up any changes made to the schedule in real-time. There is no need to re-start the service. Notice that there is no limit to the amount of jobs that can be created and maintained.

4. Tools Menu

The Tool Menu consists of the following modules: `File Management`, `Batch Grouper`, `Batch Interface`, `Purge/Recover`, `Edits Engine`, `Abstract Profile`, `Database Update History`.

4.1 File Management

The File Management allows the user to submit Submission, Correction and Institution/Facility file information to CIHI. Each of these features are designed to meet current CIHI specifications for data validation and submission file creation. Depending on the type of abstract being completed the applicable file format will be used. The type of abstracts and relevant edits are determined by the Institution Profile (Care Type).

To access File Management

Click the menu **Tools** → **File Management**. The following options will be displayed:

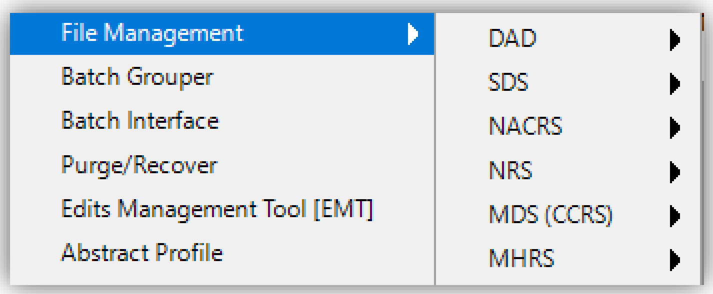


Figure 120 - File Management

4.1.1 CIHI Institution File – DAD and SDS

`Institution Files` are used to identify the facility to CIHI and provide specific information such as demographics, contact and the vendor. A separation file is set up for each institution number, even if they belong to the same facility.

The `Institution File` must be sent to CIHI before submitting records and must be updated and resent if there are changes to the information:

- At the start of each fiscal year
- Resend if there is a change in facility information (ie: Primary Contact or Facility merger) after the fiscal year facility file has been sent.
- Resend if there is a change in vendor after the fiscal year facility file has been sent.

At the start of each fiscal year, a new WinRecs update will be issued that allows the creation of the new fiscal year's file format. Users must be on the new version to create the Institution/Facility Information File for the new fiscal year.

CIHI Institution File – DAD/SDS

Entering all the information is required to send in the CIHI Institution File at the beginning of each fiscal year or when there is change in contact information.. This information will retain once saved.

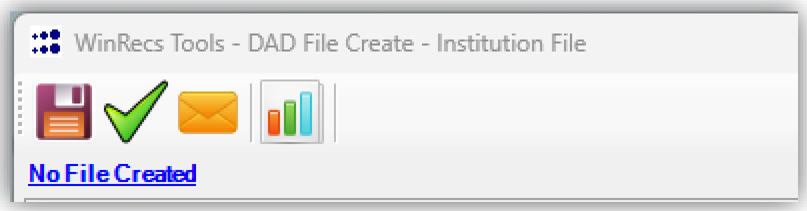
To find the CIHI Institution File go to the following path:

Tools → File Management →DAD → CIHI Institution File

Or

Tools →File Management →SDS → CIHI Institution File

The header will let you know if you are in the correct Institution File:



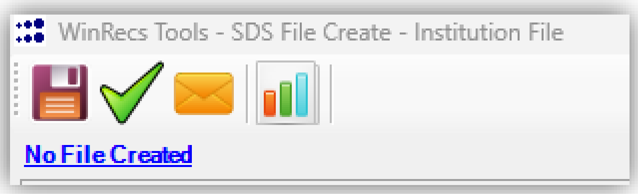


Figure 121 – CIHI Institution File – Identity File Type

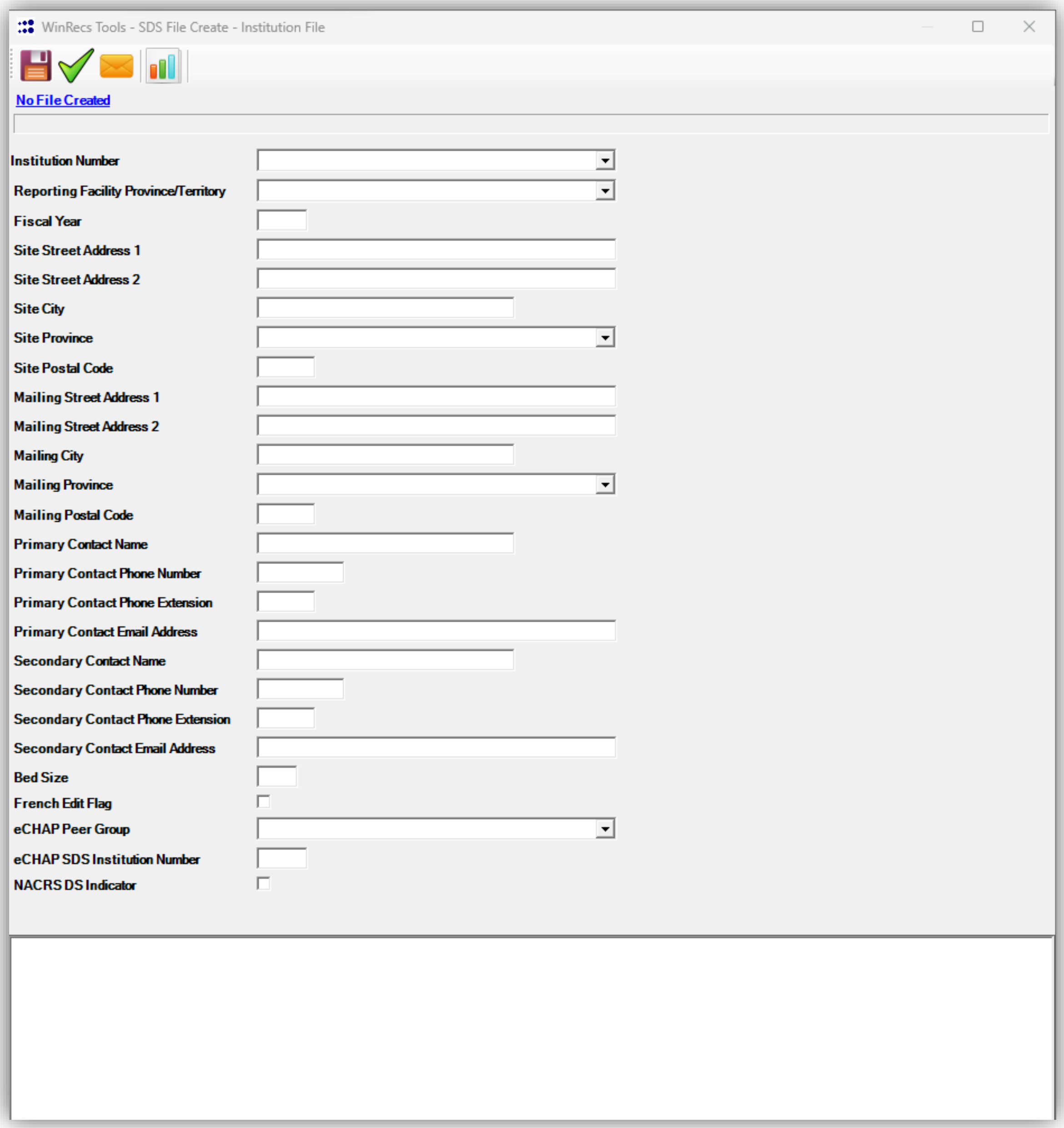


Figure 122 – CIHI Institution File – DAD/SDS

- `Institution Number` – Select the Institution Number
- `Reporting Facility Province/Territory` – Select the province
- `Fiscal Year` – Enter the current fiscal year
- `Site Street Address 1` – The address of the site
- `Site Street Address 2` – Extra line for the site address

- `Site City` – The City of the site
- `Site Province` **–** Select the province.
- `Site Postal Code` – Enter the Postal Code
- `Mailing Street Address 1` – Enter the mailing address
- `Mailing Street Address 2` – Extra line for the mailing address
- `Mailing City`– Enter City name
- `Mailing Province`**–** Select the province
- `Mailing Postal Code` - The Postal Code of the site
- `Primary Contact Name` – The primary contact name of site
- `Primary Contact Phone Number` – The primary contact phone number
- `Primary Contact Phone Extension` – The primary contact extension
- `Primary Contact Email Address` – The primary contact email address
- `Secondary Contact Name` - The secondary contact name
- `Secondary Contact Phone Number` – The secondary contact phone number
- `Secondary Contact Phone Extension` - The secondary contact phone extension
- `Secondary Contact Email Address` - The secondary contact email address
- `Bed Size` – Number of beds in site, must be numeric
- `French Edit Flag –` Click if French edits are required
- `eCHAP Peer Group` – drop down value of peer group beds
- `eCHAP SDS Institution Number –` enter Day Surgery Institution if applicable
- `NACRS DS Indicator` – check if Day Surgery is captured using NACRS

Tools:

`Verify` **[F11]** – Verifies all the entries for the selected parameters

`Create File` **[F12]** – Create the File based on parameters selected

- `Save` **[F7] –** Save the file

– `Reports` **[F10] –** Displays Select Report

Creating DAD/SDS CIHI Institution File

- Enter all mandatory criteria – users will not be able to create a file with missing mandatory fields. There will be messages listed in the message box of any missing criteria.

- Click -Verify or F11 - To ensure all mandatory criteria is complete, errors will display in the box below.
- Click - Save or F7 to save the file. These criteria will maintain after it is saved once the Institution File is accessed again.
- Click Create File or F12 to create the Institution File.
- When complete the file path will be displayed here:

4.1.2 CIHI Facility Information File – NACRS

To find the CIHI Facility Information File go to the following path:

Tools → File Management →**NACRS → CIHI Facility Information File**

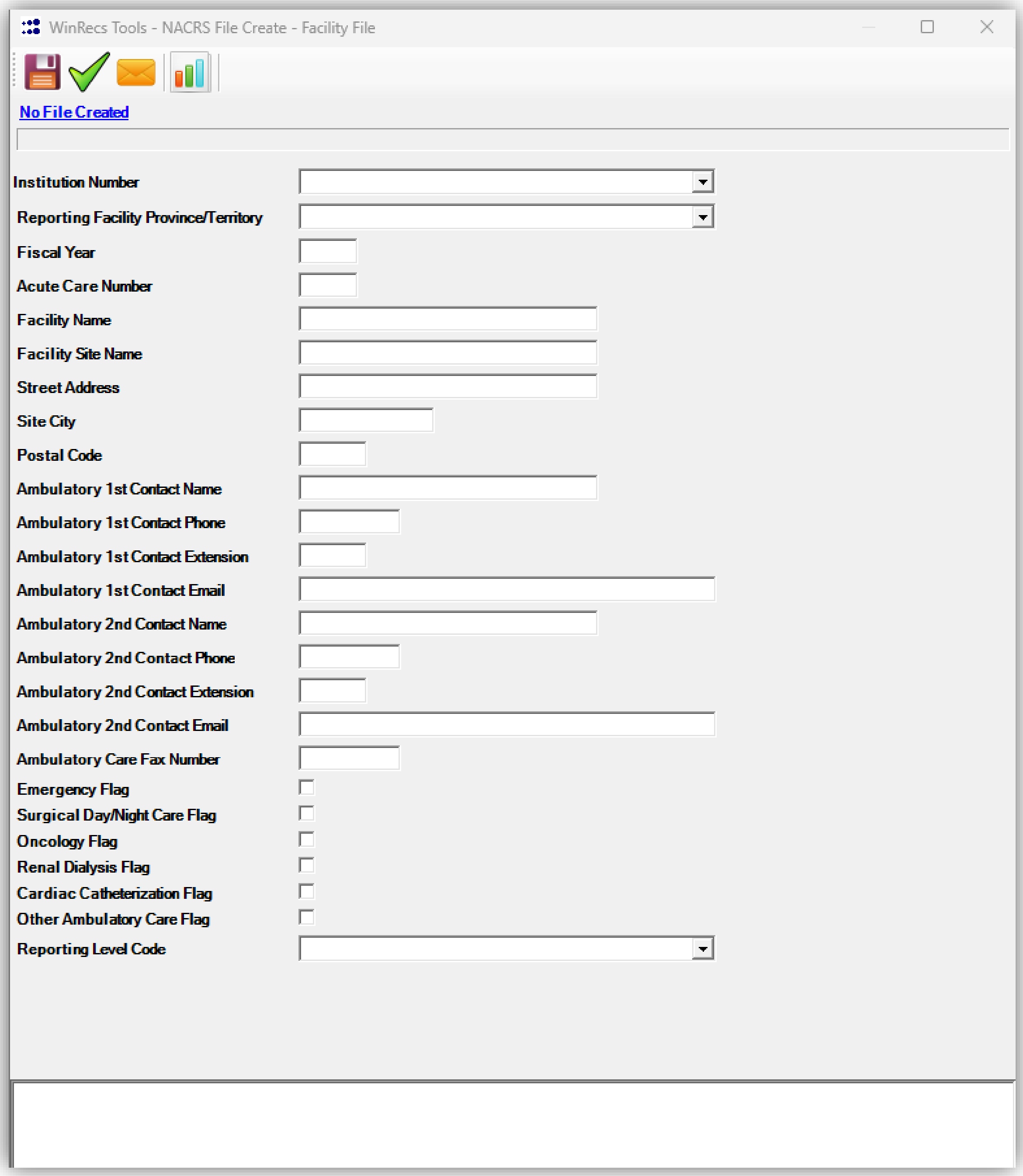


Figure 123 – Facility Information File –NACRS

- `Institution Number` – Select the Institution Number
- `Reporting Facility Province/Territory` – Select the province/territory
- `Fiscal Year` – Enter the current fiscal year
- `Acute Care Number` – Enter the Acute Institution number
- `Facility Name` – The name of the facility
- `Facility Site Name` – The name of the site
- `Street` – The address of the site
- `Site City` – The City of the site
- `Postal Code` – The Postal Code of the site
- `Ambulatory 1st Contact Name` – The primary contact name of site
- `Ambulatory 1st Contact Number` – The primary contact phone number
- `Ambulatory 1st Contact Extension` – The primary contact extension
- `Ambulatory 1st Contact Email` – The primary contact email
- `Ambulatory 2nd Contact Name` - The secondary contact name
- `Ambulatory 2nd Contact Number` – The secondary contact phone number
- `Ambulatory 2nd Contact Extension` - The secondary contact phone extension
- `Ambulatory 2nd Contact Email` – The secondary contact email address
- `Ambulatory Care Fax Number` – Fax number for site
- `Emergency Flag` – Check this box if submitting ER records
- `Surgical Day/Night Care Flag` – Check this box if submitting Surgical Day or Night Care records
- `Oncology Flag` – Check this box if submitting Oncology records
- `Renal Dialysis Flag` – Check this box if submitting Renal Dialysis records
- `Cardiac Catheterization Flag` - Check this box if submitting Cardiac Catheterization records
- `Reporting Level Code` – The NACRS Submitting Level your facility is submitting to CIHI

A	Level 0 or Level 1 only facility
B	Level 0 or Level 3 only facility
C	Level 0 or Level 2 only facility
D	Level 0 or Level 1 plus 3 facility
E	Level 0 or Level 2 plus 3 facility

- `Other Ambulatory Care Flag` – Check this box if submitting other ambulatory care records not shown above

File creation toolbar.

- `Save` **[F7]** – saves the data entered in the Facility Information File

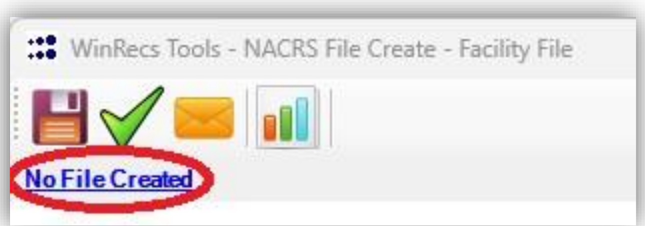
`Verify` **[F11]** – all the entries for the selected parameters

`Create File` **[F12]** – Create the File based on parameters selected

`Reports` **[F10]** – Displays Select Reports

Creating NACRS Facility Information File

- Enter all mandatory criteria – users will not be able to create a file with missing mandatory fields. There will be messages listed in the message box of any missing criteria.
- Click -Verify or F11 - To ensure all mandatory criteria is complete, errors will display in the box below.
- Click - Save or F7 to save the file. These criteria will maintain after it is saved once the Institution File is accessed again.
- Click Create File or F12 to create the Institution File.
- When complete the file path will be displayed here:



4.1.3 MDS(CCRS) CIHI Contact Information File

Tools → File Management →MDS (CCRS) → CIHI Contact Information File

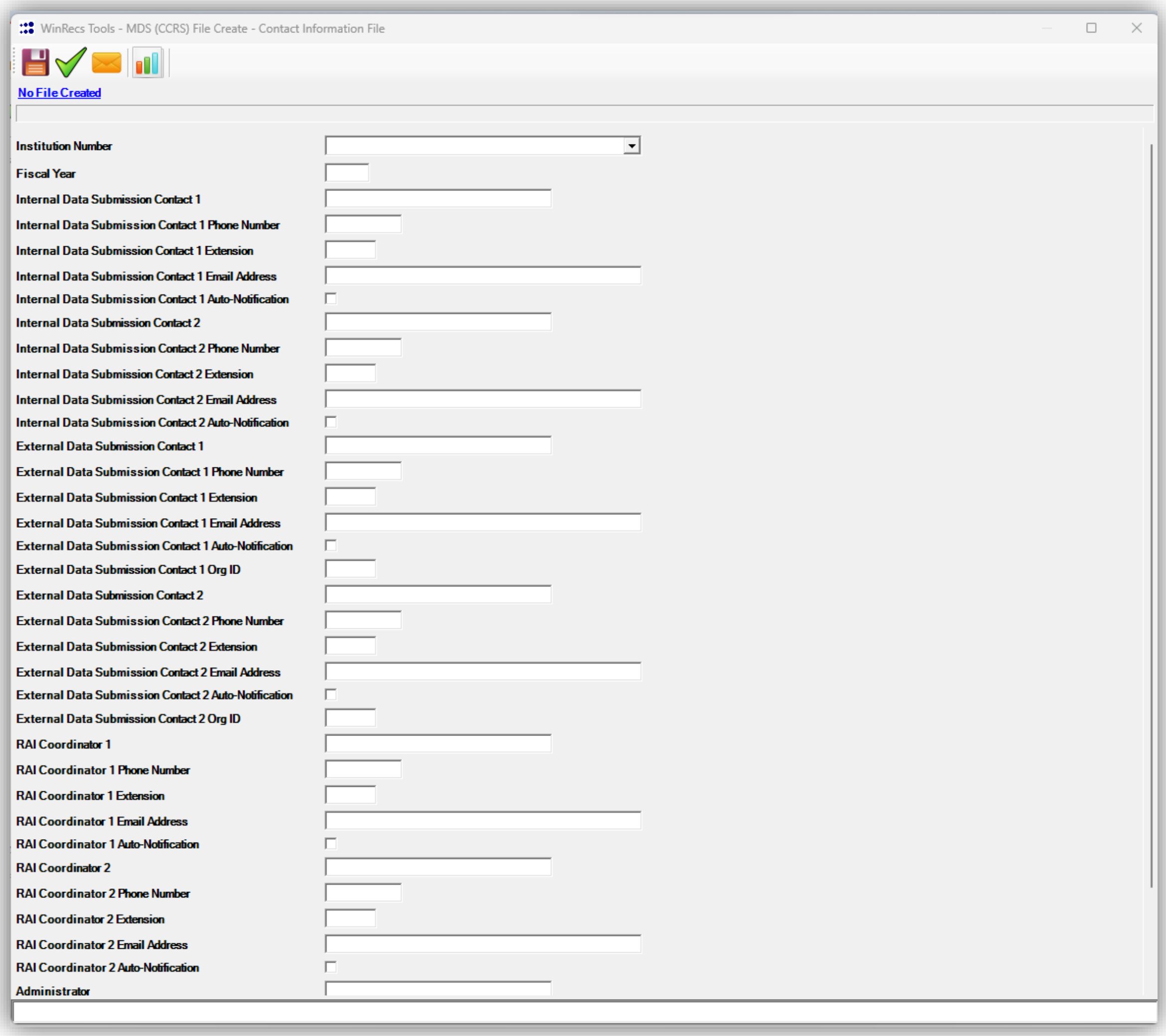


Figure 124 – MDS(CCRS) CIHI Contact Information File

- `Institution Number` – Select the Institution Number
- `Fiscal Year` – Enter the current fiscal year
- `Internal Data Submission Contact 1` – Enter the Contact 1 Name
- `Internal Data Submission Contact 1 Telephone` – Enter the phone number
- `Internal Data Submission Contact 1 Extension` – Enter the extension
- `Internal Data Submission Contact 1 Email Address` – Enter the email
- `Internal Data Submission Contact 1 Auto-Notification` – Enter a check mark if auto-notification is needed
- `Internal Data Submission Contact 2` – Enter the Contact 2 Name

- `Internal Data Submission Contact 2 Telephone` – Enter the phone number
- `Internal Data Submission Contact 2 Extension` – Enter the extension
- `Internal Data Submission Contact 2 Email Address` – Enter the email
- `Internal Data Submission Contact 2 Auto-Notification` – Enter a check mark if auto-notification is needed
- `External Data Submission Contact 1` – Enter the Contact 1 Name
- `External Data Submission Contact 1 Phone Number` – Enter the phone number
- `External Data Submission Contact 1 Extension` – Enter the extension
- `External Data Submission Contact 1 Email Address` – Enter the email
- `External Data Submission Contact 1 Org ID` – Enter the Org ID
- `External Data Submission Contact 1 Auto-Notification` – Enter a check mark if auto-notification is needed
- `External Data Submission Contact 2` – Enter the Contact 2 Name
- `External Data Submission Contact 2 Phone Number` – Enter the phone number
- `External Data Submission Contact 2 Extension` – Enter the extension
- `External Data Submission Contact 2 Email Address` – Enter the email
- `External Data Submission Contact 2 Auto-Notification` – Enter a check mark if auto-notification is needed
- `External Data Submission Contact 2 Org ID` – Enter the Org ID
- `RAI Coordinator 1` – Enter the RAI Coordinator 1 Name
- `RAI Coordinator 1 Phone Number` – Enter the phone number
- `RAI Coordinator 1 Extension` – Enter the extension
- `RAI Coordinator 1 Email Address` – Enter the email
- `RAI Coordinator 1 Auto-Notification` – Enter a check mark if auto-notification is needed
- `RAI Coordinator 2` – Enter the RAI Coordinator 2 Name
- `RAI Coordinator 2 Phone Number` – Enter the phone number
- `RAI Coordinator 2 Extension` – Enter the extension
- `RAI Coordinator 2 Email Address` – Enter the email
- `RAI Coordinator 2 Auto-Notification` – Enter a check mark if auto-notification is needed
- `Administrator` – Enter the Administrator Name
- `Administrator Phone Number` – Enter the phone number
- `Administrator Extension` – Enter the extension
- `Administrator Email Address` – Enter the email

- `Administrator Auto-Notification –` Enter a check mark if auto-notification is needed
- File creation toolbar:

  - `Save` **[F7]** – saves the data entered in the Facility Information File

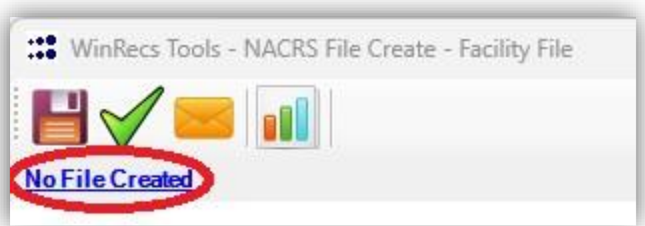
  `Verify` **[F11]** – all the entries for the selected parameters

  `Create File` **[F12]** – Create the File based on parameters selected

  `Reports` **[F10]** – Displays Select Reports

Creating MDS (CCRS) CIHI Contact Information File

- Enter all mandatory criteria – users will not be able to create a file with missing mandatory fields. There will be messages listed in the message box of any missing criteria.
- Click -Verify or F11 - To ensure all mandatory criteria is complete, errors will display in the box below.
- Click - Save or F7 to save the file. These criteria will maintain after it is saved once the Institution File is accessed again.
- Click Create File or F12 to create the Institution File.
- When complete the file path will be displayed here:



4.1.4 NRS CIHI Contact Information File

Tools → File Management →NRS → CIHI Contact Information File

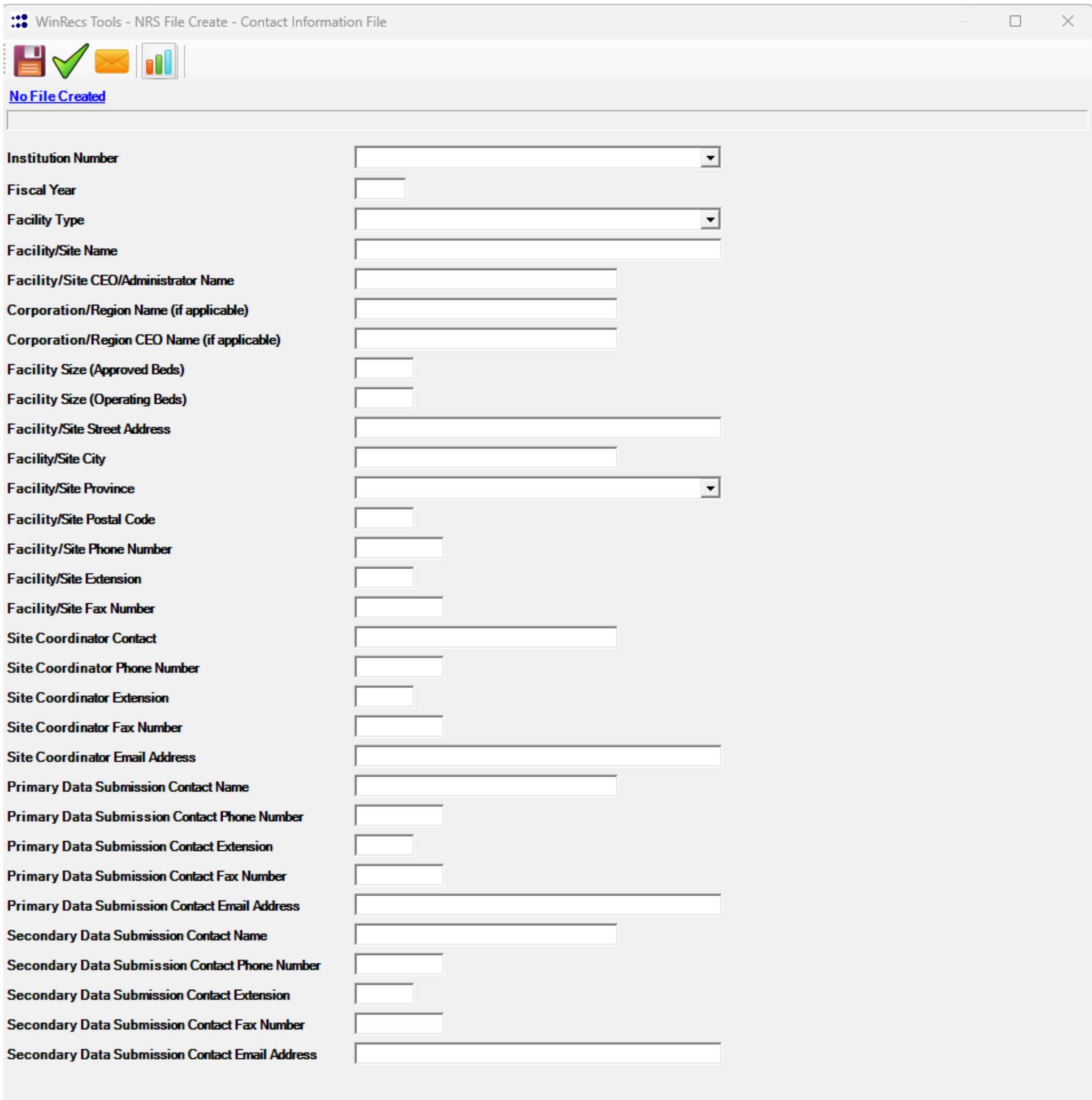


Figure 125 – NRS CIHI Contact Information File

- `Institution Number` – Select the Institution Number
- `Fiscal Year` – Enter the current fiscal year
- `Type of Facility` – Enter the Type of Facility from the drop-down menu

  1 Specialty/Free Standing
  2 General/Acute

- `Facility/Site Name` – Enter the Facility/Site name
- `Facility/Site CEO/Administrator Name` – Enter name

- Corporation/Region Name (if applicable) – Enter name
- Corporation/Region CEO Name (if applicable) – Enter name
- Facility Size (Approved Beds) – Enter bed number
- Facility Size (Operating Beds) – Enter bed number
- Facility/Site Street Address – Enter address
- Facility/Site City – Enter the City
- Facility/Site Province – Enter the province from the drop down menu
- Facility/Site Postal Code – Enter the postal code
- Facility/Site Phone Number – Enter the phone number
- Facility/Site Extension – Enter phone extension
- Facility/Site Fax Number – Enter fax number
- Site Coordinator Contact – Enter Site Coordinator name
- Site Coordinator Phone Number – Enter the phone number
- Site Coordinator Extension – Enter the extension
- Site Coordinator Fax Number – Enter Fax number
- Site Coordinator Email Address – Enter Email Address
- Primary Data Submission Contact Name – Enter name
- Primary Data Submission Contact Phone Number – Enter the phone #
- Primary Data Submission Contact Extension – Enter the extension
- Primary Data Submission Contact Fax Number – Enter the fax number
- Primary Data Submission Contact Email Address – Enter the email
- Secondary Data Submission Contact Name – Enter name
- Secondary Data Submission Contact Phone Number – Enter the phone #
- Secondary Data Submission Contact Extension – Enter the extension
- Secondary Data Submission Contact Fax Number – Enter the fax number
- Secondary Data Submission Contact Email Address – Enter the email
- File creation toolbar:

 - Save **[F7]** – saves the data entered in the Facility Information File

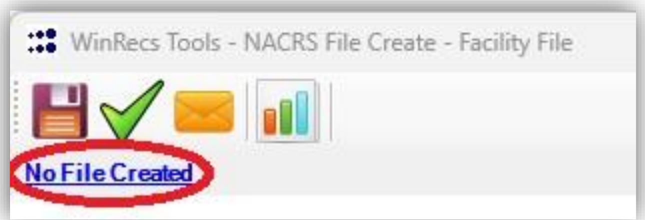
 Verify **[F11]** – all the entries for the selected parameters

 Create File **[F12]** – Create the File based on parameters selected

 Reports **[F10]** – Displays Select Reports

Creating NRS CIHI Contact Information File

- Enter all mandatory criteria – users will not be able to create a file with missing mandatory fields. There will be messages listed in the message box of any missing criteria.
- Click -Verify or F11 - To ensure all mandatory criteria is complete, errors will display in the box below.
- Click - Save or F7 to save the file. These criteria will maintain after it is saved once the Institution File is accessed again.
- Click Create File or F12 to create the Institution File.
- When complete the file path will be displayed here:



4.1.5 OMHRS CIHI Contact Information File

Tools → File Management →OMHRS → CIHI Contact Information File

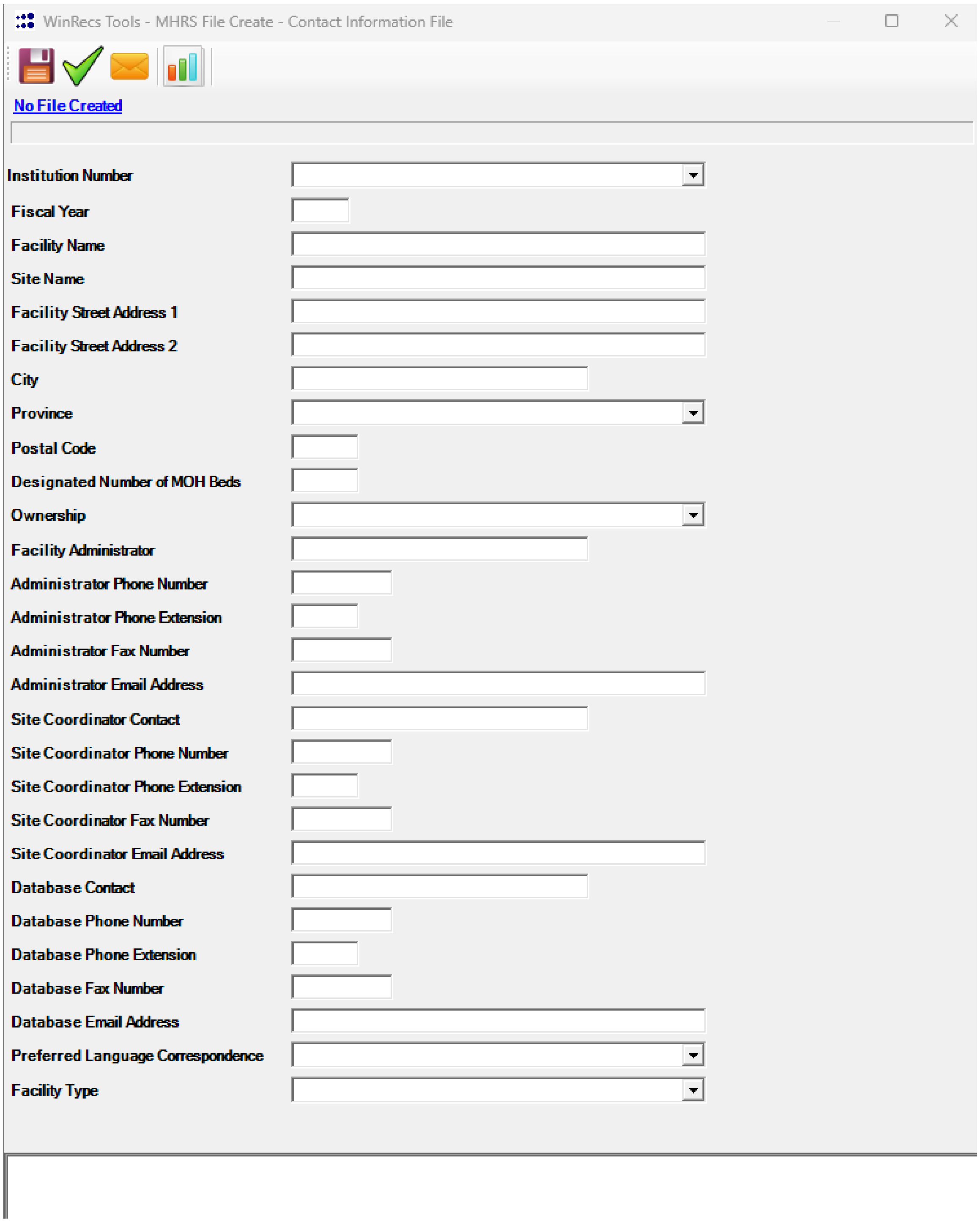


Figure 126 – OMHRS CIHI Contact Information File

- Institution Number – Select the Institution Number from drop down
- Reporting Facility Province/Territory – Select Province/Territory from drop down
- Fiscal Year – Enter the current fiscal year
- Facility Name – Enter the Facility Name
- Site Name – Enter the Site name
- Facility Address Line 1 – Enter Facility address
- Facility Address Line 2 – Enter address (if needed)
- City – Enter the City
- Province – Enter the province from the drop down menu
- Postal Code – Enter the postal code
- Designated Number of MOH Beds – Enter number of designated beds
- Ownership – Select from drop down
- Facility Administrator – Enter Facility Administrator name
- Administrator Phone Number – Enter the phone number
- Administrator Phone Extension – Enter the extension
- Administrator Fax Number – Enter Fax number
- Administrator Email Address – Enter Email Address
- Site Coordinator Contact – Enter name
- Site Coordinator Phone Number – Enter the phone #
- Site Coordinator Extension – Enter the extension number
- Site Coordinator Fax Number – Enter the fax number
- Site Coordinator Email – Enter the email
- Database Contact – Enter name
- Database Phone Number – Enter the phone #
- Database Phone Extension – Enter the extension
- Database Fax Number – Enter the fax number
- Database Email Address – Enter the email
- Preferred Language of Correspondence – Enter preferred language from drop down
- Facility Type – Enter facility type from drop down
- File creation toolbar:

  - Save **[F7]** – saves the data entered in the Facility Information File

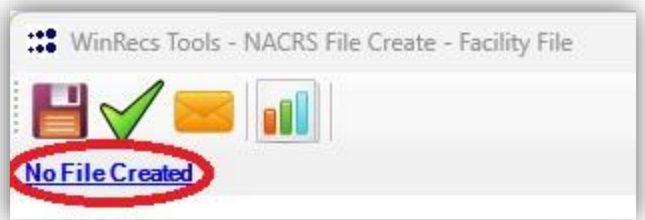
  Verify **[F11]** – all the entries for the selected parameters

`Create File` **[F12]** – Create the File based on parameters selected

`Reports` **[F10]** – Displays Select Reports

Creating MHRS CIHI Contact Information File

- Enter all mandatory criteria – users will not be able to create a file with missing mandatory fields. There will be messages listed in the message box of any missing criteria.
- Click -Verify or F11 - To ensure all mandatory criteria is complete, errors will display in the box below.
- Click - Save or F7 to save the file. These criteria will maintain after it is saved once the Institution File is accessed again.
- Click Create File or F12 to create the Institution File.
- When complete the file path will be displayed here:



4.2.1 CIHI Submission File – DAD & NACRS

There are four basic processes involved in the submission of data to CIHI:

1. Month end balances – ensure the number of abstracts in WinRecs balances with Finance or Registration.
2. Create and send Facility Information File (at the start of the Fiscal Year or if information needs to be updated)
3. Create and submit monthly (or quarterly) data files.
4. Receive and import rejection files for correction and/or resubmission of abstracts.

The submission process will:

1. Verify options
2. Verify all records are complete
3. Verify all records are error free
4. Assign CIHI **Record Types, Batch Numbers** and **CIHI Abstract Number** to each record
5. Create the CIHI file so that it conforms to CIHI specifications
6. Save the file to a predetermined location as set in the Institution Profile →File Path → CIHI Directory

If an update to any of the groupers (ie CMG, DPG and CACS) has been applied after the records have been coded, The Batch Grouper (see Batch Grouper) will need to be run prior to Submission. This ensures that the most up to date calculation will be submitted with the records.

When an abstract has been submitted to CIHI the field `Is File Create (Submitted)` in the Abstract Status section will be filled in with a *'Y' – Yes.*

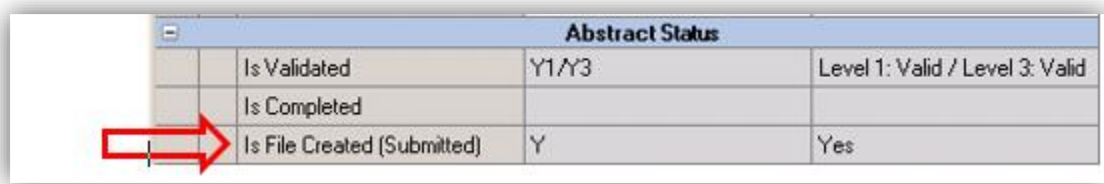


Figure 127 – Is File Created(Submitted)

Submission Setup Requirements

Ensure the **Institution Profile/File Path/CIHI Directory** is completed with the path to where the CIHI files will be saved. (Submission & Facility Profile).

If the **CIHI Directory** is left blank, then the file will automatically go to C:\Users

Access File Creation

To access the file creation screen, click the menu **Tools** → **File Management**. The following will display:

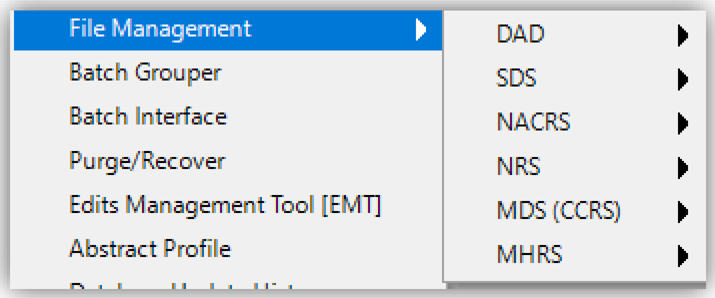


Figure 128 – File Management Screen

DAD/SDS CIHI Submission & CJRR CIHI Insert/Update Data Submission File

- **DAD → CIHI Submission File – or –**
  SDS → CIHI Submission File

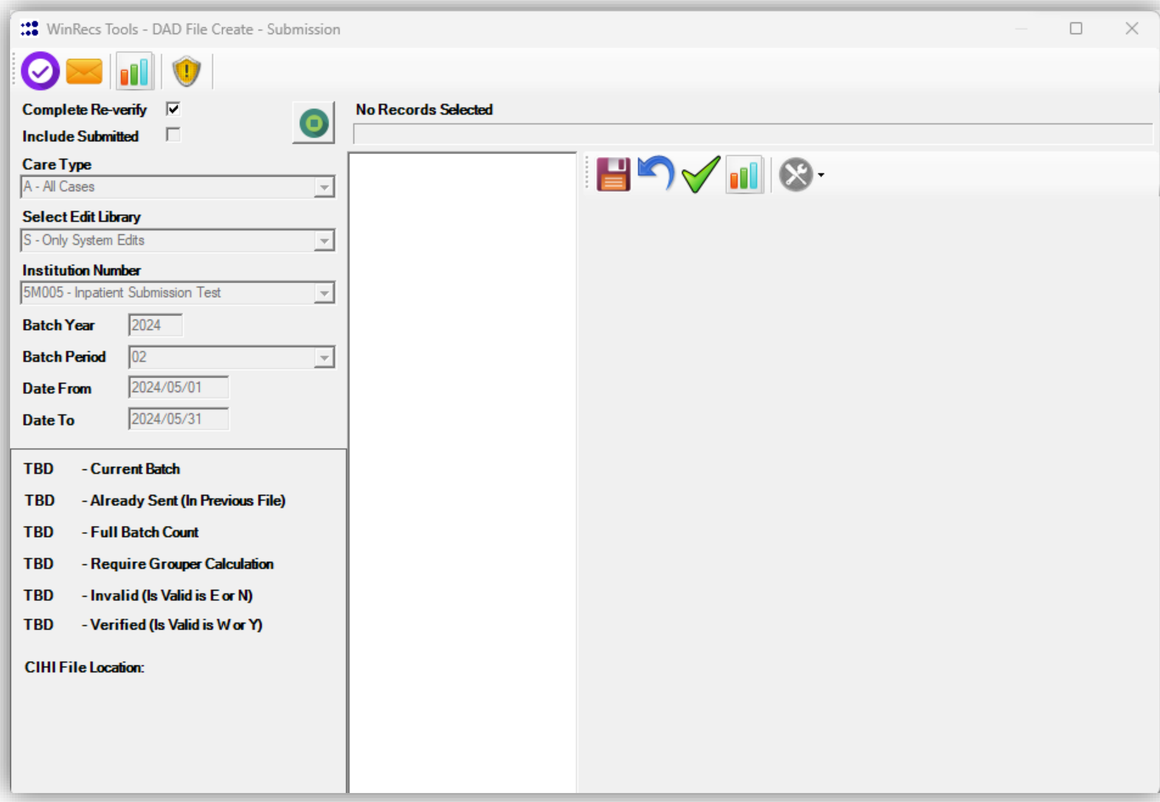
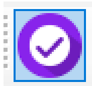
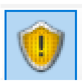
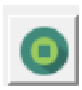
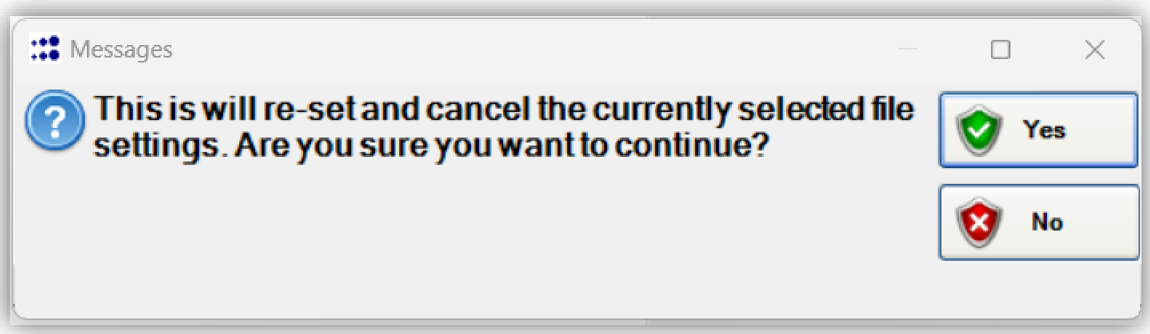


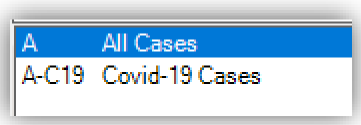
Figure 129 – File Management DAD/SDS Submission File Screen

-  - `Batch Verify` (**Shift+F11**) – This will reverify all abstracts in the selected Batch
-  - `Create File` (**F12**) – This will create the file, if the Batch Verify is run just click on Create File and the file wil will be created.
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records
-  - `Reset File Settings` – This will reset the file setting below. The following message will display when clicked:

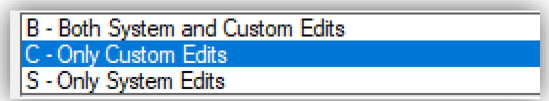


  - Yes will clear the below settings, No will retain the current settings.

- `Complete Re-verify` – checking this box will re-verify every record, not checking the box will not re-verify.
- `Include Submitted` – Only used to verify submitted EMT edits. Can only be used checking this box will also automatically check the Complete Re-verify and Create File is disabled. Only C- Only Custom Edits can be used in the Select Edit Library.
- `Care Type –` Drop down menu – A-All Cases defaults



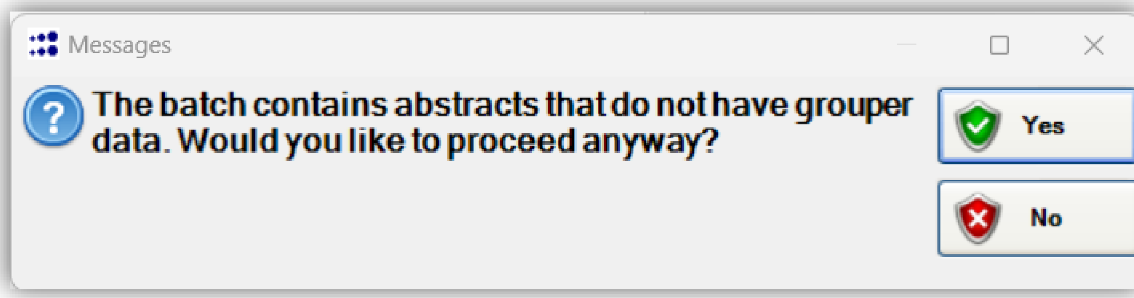
- `Select Edit Library –` Allow user to run the submission using:



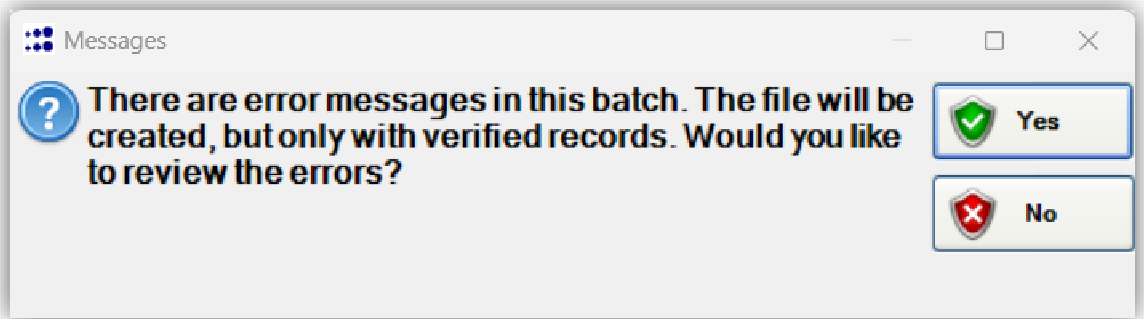
Custom Edits are EMT edits and only used for EMT clients.

System Edits are edits required for submission to CIHI.

- `Institution Number` – enter the institution number or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- `Batch Year` – this will be blank the first time it is used, entering the fiscal year that is being submitted
- `Batch Period` – this will default if previous periods have been submitted/enter the period/or choose from the drop down list
- `Date from` – will populate based on the `Batch Period`, can be modified if required
- `Date to` – will populate based on the `Batch Period`, can be modified if required
- `Current Batch` – will populate how many records are in the Current Batch Period
- `Already Sent (In Previous File)` – will populate the number of records that have been previously submitted
- `Full Batch Count` – Total records in the Batch
- `Require Grouper Calculation` – This feature will populate the number of records that do not have grouper information. A message will also populate while running verify that will state the following:



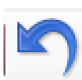
- `Invalid (Is Valid E or N)` – This displays the number of abstracts that have "N" or "E" in the is 'Is Valid' field on the abstract. During the File Create process a message will display asking the following:

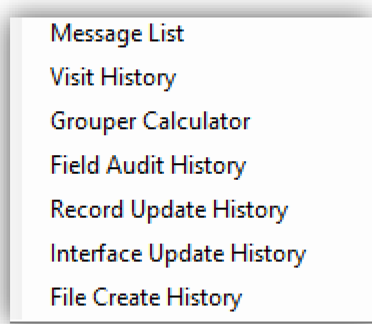


- "Yes" will display the error messages and give the ability to fix the errors
- "No" will not display the errors and the file will be created without the errors.

o `Verified (Is Valid W or Y)` – This displays the number of abstracts that have "W" or "Y" in the is 'Is Valid' field on the abstract

o  - Abstract menu – used when fixing abstracts with Errors and Warnings

-  - `Save` **(F7)** – Saves the record
-  - `Undo` – Undoes any changes to the record
-  - `Record Verify` **(F11**) – Verifies the Record
-  - `Report Manager`(**F10**) – Opens Select Report
-  - `Tools`– Click on the different options to change the view at the bottom of the abstract



NACRS Level 0, 1, 2, 3 Submission

To access NACRS Submissions

Tools → File Management → NACRS →

NACRS Level 0 (Clinic Lite) → CIHI Submission File

NACRS Level 1 → CIHI Submission File

NACRS Level 2 → CIHI Submission File

NACRS Level 3 → CIHI Submission File

The Level that is being submitted is displayed along the top Submission Screen:

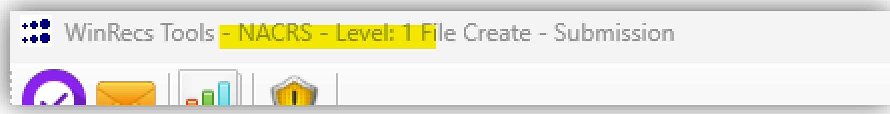


Figure 130 – File Management NACRS CIHI Submission File Identification

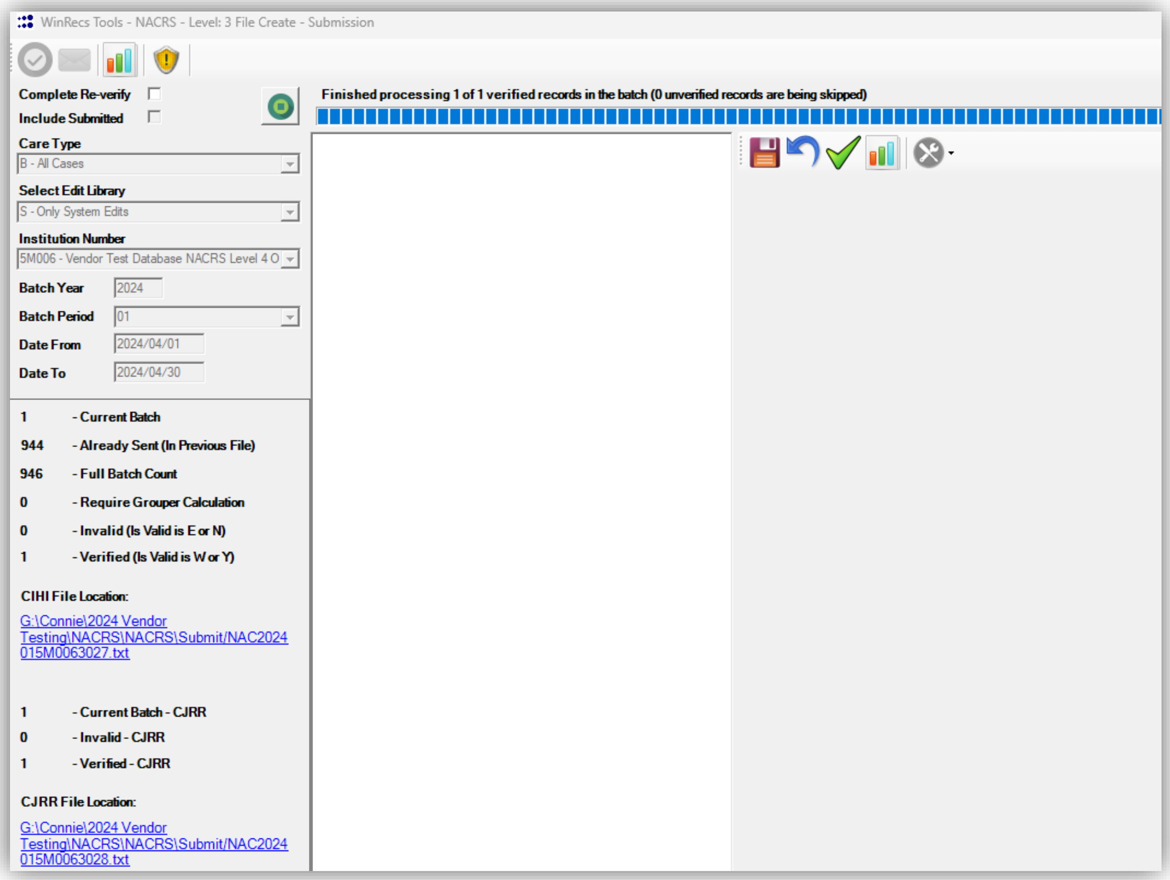
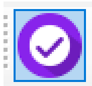
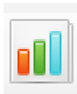
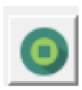
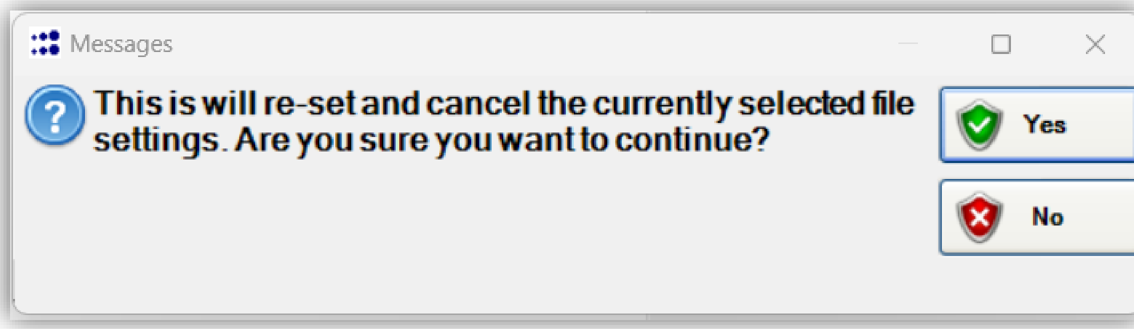


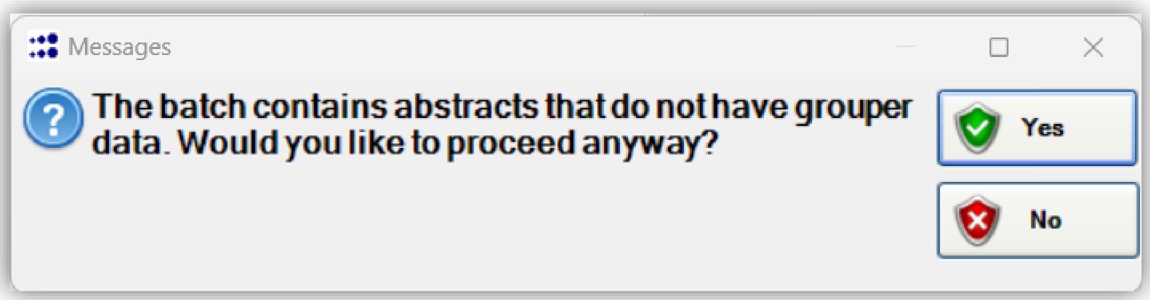
Figure 131 – File Management NACRS CIHI Submission File Screen

-  - `Batch Verify` (**Shift+F11**) – This will reverify all abstracts in the selected Batch
-  - `Create File` (**F12**) – This will create the file, if the Batch Verify is run just click on Create File and the file wil will be created.
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records
-  - `Reset File Settings` – This will reset the file setting below. The following message will display when clicked:



  - Yes will clear the below settings, No will retain the current settings
- `Complete Re-verify` – checking this box will re-verify every record, not checking the box will not
- `Include Submitted` – Only used to verify submitted EMT edits. Can only be used checking this box will also automatically check the Complete Re-verify and Create File is disabled. Only C- Only Custom Edits can be used in the Select Edit Library
- `Care Type` - allows the user the option(not included in Level 0):
  - `B All Cases` – will validate for all Care Types (Level 3 only)
  - `B-C Clinic` – will validate for all MIS codes with a 'Clinic' Care Types (Level 3 only)
  - `B-D Day Surgery` – will validate for all MIS codes with a Day Surgery Care Type (Level 3 only)
  - `B-E Emergency` – will validate for all MIS codes with an Emergency Care Type (Level 1, 2, 3)
  - `B-E-O ED Opioid Cases` – will validate for all Opioid Cases only (Level 1, 2, 3)
- `Select Edit Library` – Allow user to run the submission using:
  - B-Both System and Custom Edits

  - S- Only System Edits (For NACRS Level 0 this is the only option)
  - C- Only Custom Edits
- `Institution Number` – enter the institution number that is to be sent or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- `Batch Year` – this will be blank the first time it is used, entering the fiscal year that is being submitted
- `Batch Period` – this will default if previous periods have been submitted/enter the period/or choose from the drop down list
- `Date from` – will populate based on the `Batch Period`, NACRS submission has the option to submit specified dates in a period
- `Date to` – will populated based on the `Batch Period`, NACRS submission has the option to submit specified dates in a period
- `Current Batch` – will populate how many records are in the Current Batch Period
- `Already Sent(In Previous File)` – will populate the number of records that have been previously submitted
- `Full Batch Count` – Total records in the Batch
- `Require Grouper Calculation` – This feature will populate the number of records that do not have grouper information. A message will also populate while running verify that will state the following:

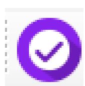


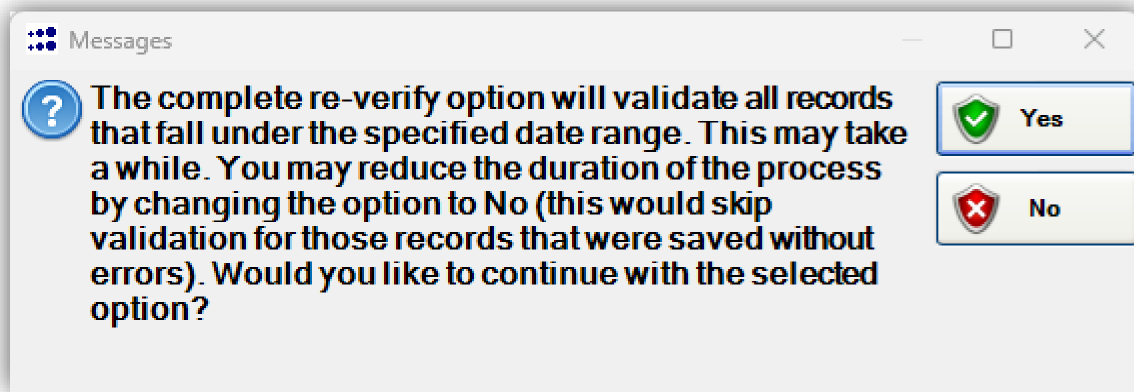
- `Invalid (Is Valid E or N)` – This displays the number of abstracts that have "N" or "E" in the is 'Is Valid' field on the abstract.
  - "Yes" will display the error messages and give the ability to fix the errors
  - "No" will not display the errors and the file will be created without the errors.
- `Verified (Is Valid W or Y)` – This displays the number of abstracts that have "W" or "Y" in the is 'Is Valid' field on the abstract. During the File Create process a message will display asking the following:
- `CIHI File Location` – Displays the file location, clicking on the link will open the location the file is located.
- `Current Batch` – number of CJRR records in this Batch Period (Level 3 CJRR only)
- `Invalid – CJRR` – number of records that are invalid in this Batch Period (Level 3 CJRR only)

- `Verified – CJRR` – number of records that are verified and included in the file for this Batch Period (Level 3 CJRR only)
- `CJRR File Location` – Location of the CIHI CJRR file, clicking on link open CIHI CJRR file location. (Level 3 CJRR only)

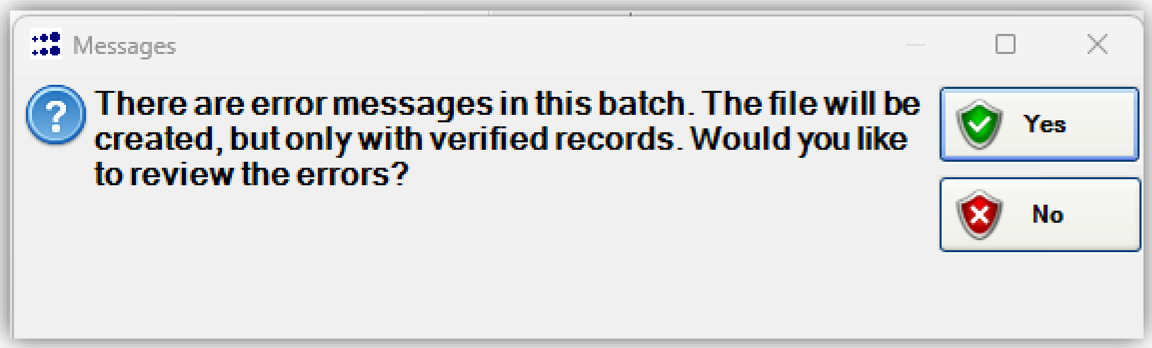
4.2.2 Running the Submission

Verification Only

- To run a verification only, enter the following fields:
  - `Care Type`
  - `Select Edit Library`
  - `Institution Number`
  - `Batch Year`
  - `Batch Period`
  - `Date From` – can be adjusted but not necessary.
  - `Date to` – can be adjusted but not necessary.
  - Press  `Batch Verify` or **Shift+{F11}**
  - The following message will display:

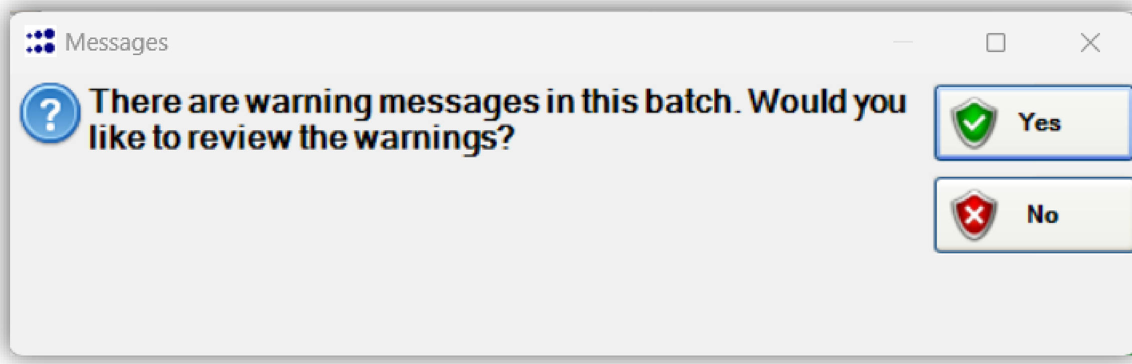


  - Click “Yes” to continue verification, “No” to end the process.
  - The submission will continue if there are errors or warnings the following message will appear:



- Click “Yes” to review the error messages and ‘No” to continue the submission without the errors.

- If there are only warnings the following will display:



- Click “Yes” to review the warning messages.
- Click ‘No” to continue the verification without the errors.

Fixing Errors/Warnings

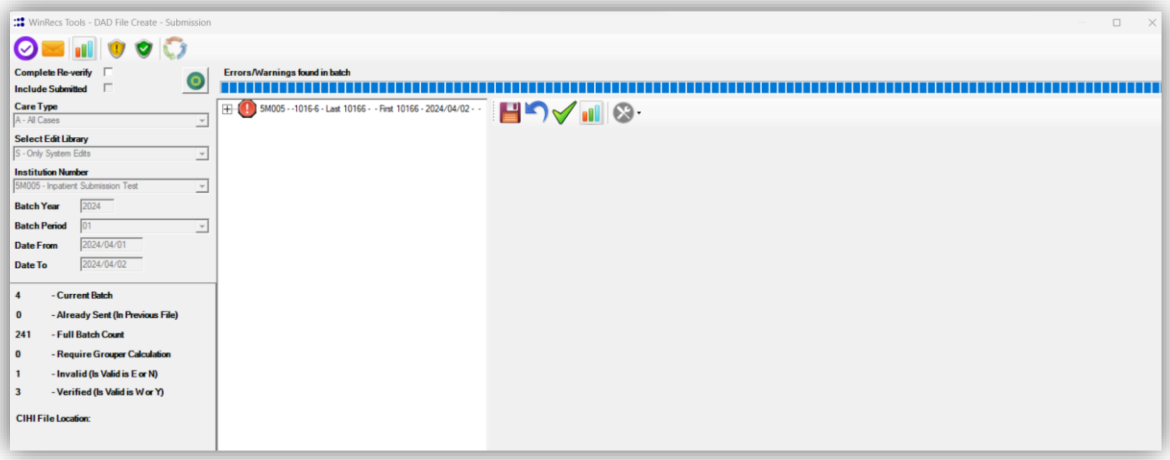
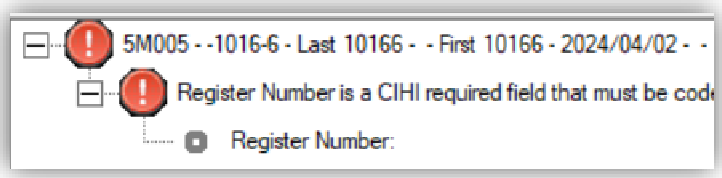
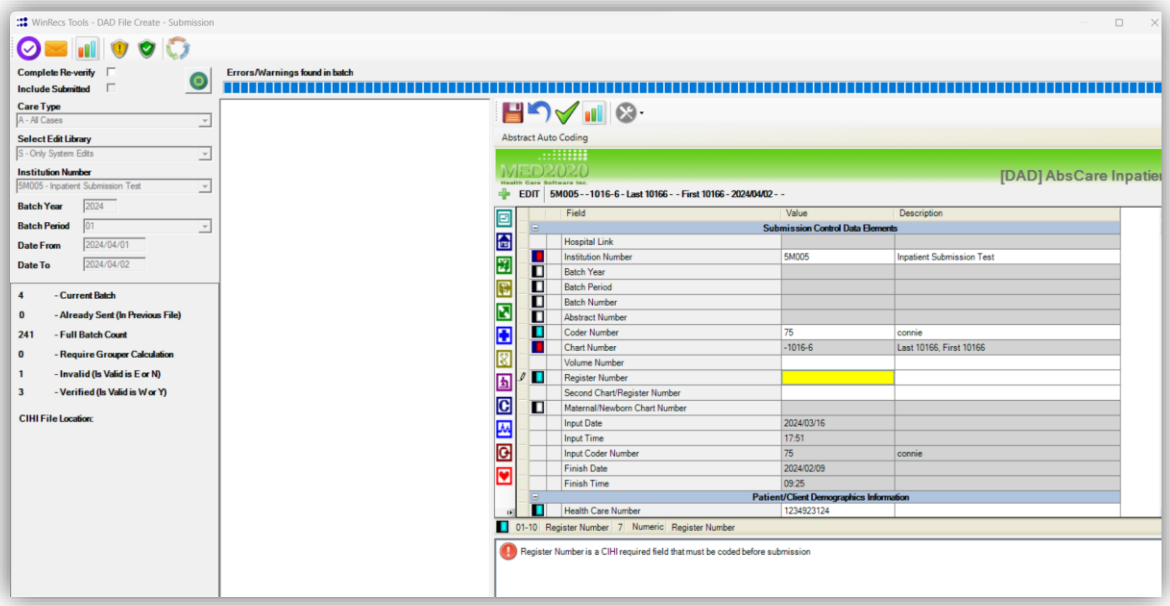


Figure 132 – File Management NACRS CIHI Submission Fixing Errors/Warnings

- Click on the plus sign beside the abstract information
- Click on the plus sign beside the error message
- Double click on the field that is causing the error to open up the abstract on the right-hand side.

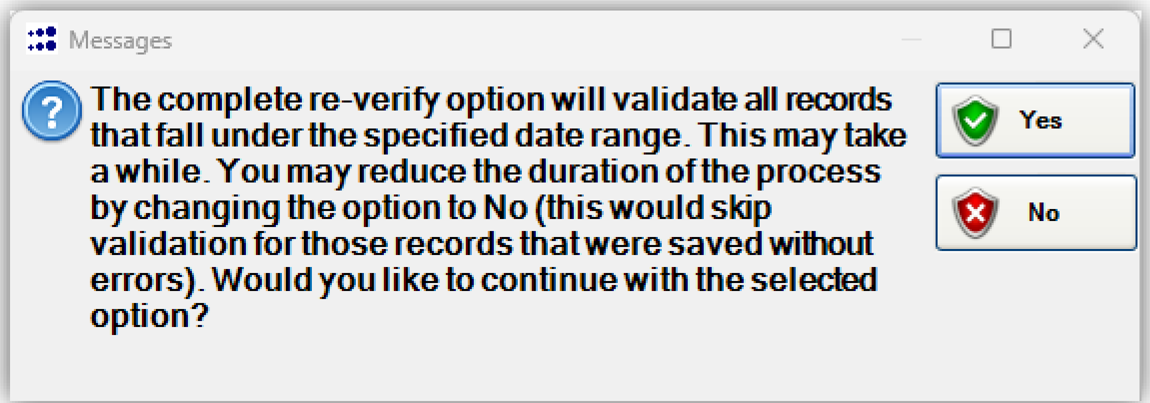




- Fix the error and it will disappear from the middle.
- Press `Save` or **[F7]**
- If you want to create a submission after doing a verification, press `Create File` or **[F12]** to create the file.

Create Submission

- Select the following fields:
  - Complete Re-Verify – check this if a re-verification is needed.
  - Care Type
  - Select Edit Library
  - Institution Number
  - Batch Year
  - Batch Period
  - Date From – can be adjusted but not necessary.
  - Date to – can be adjusted but not necessary.
  - Press `Create File` or **[F12]**
- The following message will display:

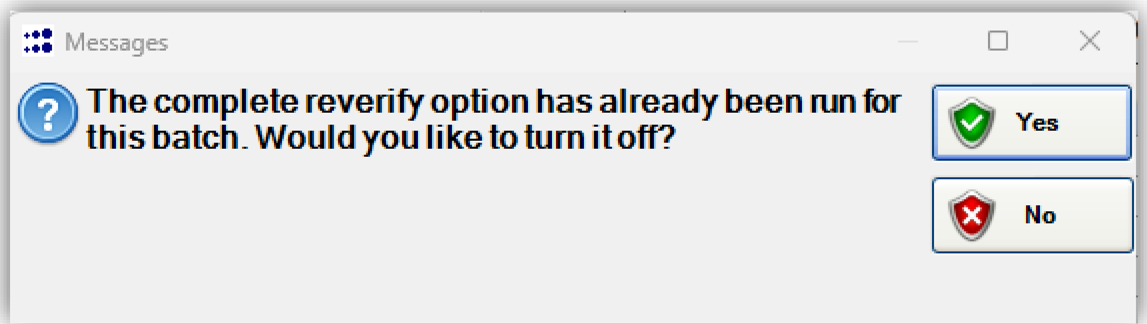


- Click "Yes" to continue verification, "No" to end the process.

○ The submission will continue if there are errors and/or warnings the following message will appear see: *Fixing Errors/Warnings*

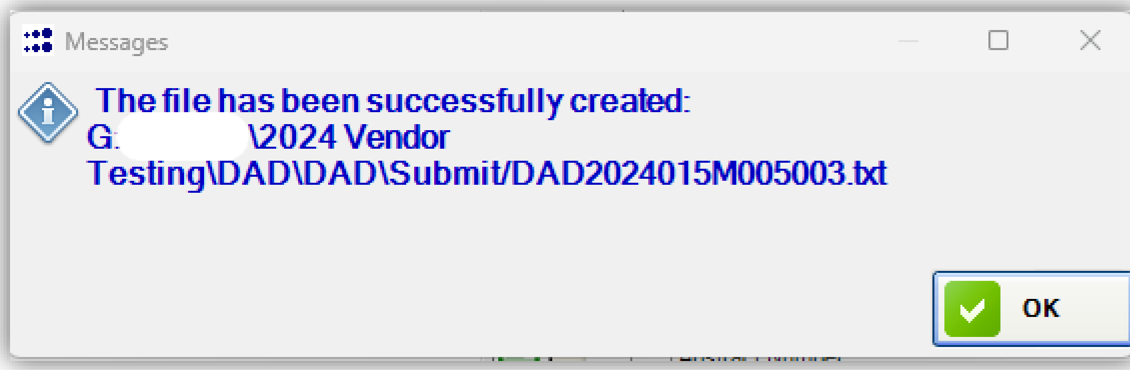
○ Once errors are reviewed/fixed, click the  Create File or (F12)

- The following message will display:



- "Yes" will remove the Complete Re-Verify and the Submission File will be created
- "No, the Re-Verify process will run again and then Submission File will be created.

- Once the submission process is complete, the following message will display and the file path will display on the bottom left hand side. :



4.2.3 CIHI Correction File – DAD & NACRS

The CIHI Correction module tracks, stores, and submits correction for abstracts that have been previously submitted to CIHI. The Correction module is only used with the:

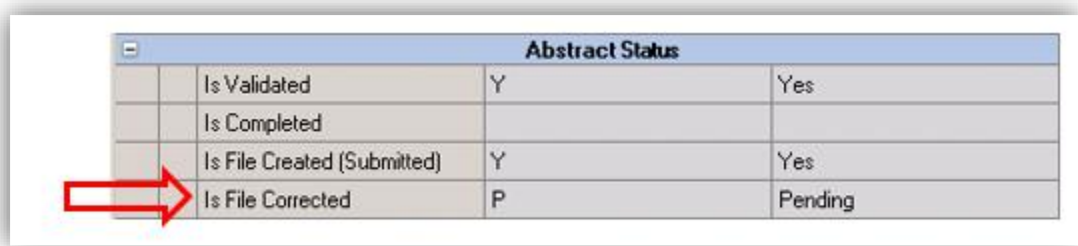
- [DAD] AbsCare Inpatient module
- [SDS] Abscare Day Surgery module
- [NACRS] 1, 2, 3 Amcare Ambulatory module

DAD & SDS are submitted cumulatively over the fiscal year (i.e.: correction files are not period specific but fiscal year specific)

NACRS are submitted period by period and are not cumulative.

All other WinRecs modules submit corrections with their submissions file.

Abstracts that have been sent for correction will have the field `'Is File Corrected'` in the Abstract Status section of the abstract.



Abstract Status		
Is Validated	Y	Yes
Is Completed		
Is File Created (Submitted)	Y	Yes
Is File Corrected	P	Pending

Figure 133 - CIHI Correction Status in the Abstract

The following will display in the **Is File Corrected** field:

- *N* = No there is not correction pending
- *P* = Correction pending in DAD/SDS module
- *P1* = NACRS Level 1 pending
- *P2* = NACRS Level 2 pending
- *P3* = NACRS Level 3 pending

Creating a Correction File

When accessing a submitted record, the following warning message will display:

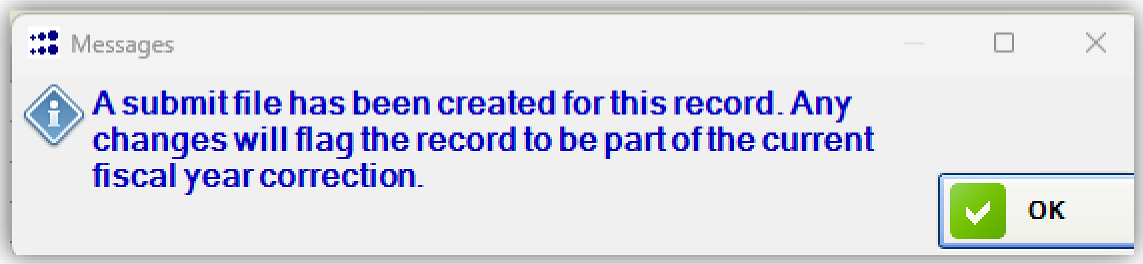


Figure 134 – Message for Accessing a Record Submitted to CIHI

When any changes are made or the abstract is saved, the `'Is File Corrected field'` will change to *Pending* as explained above.

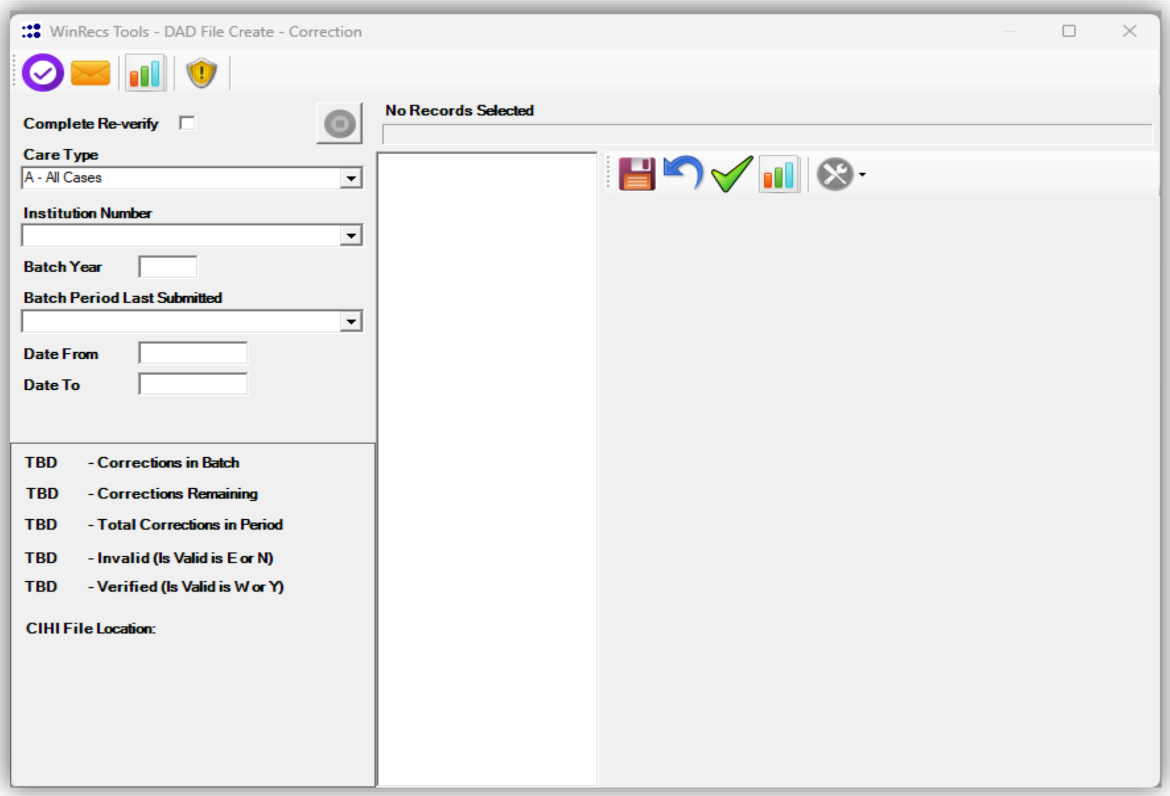
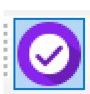
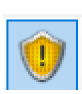
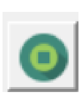
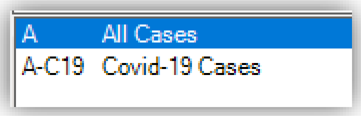


Figure 135 – File Management – DAD/SDS CIHI Correction File Screen

-  - `Batch Verify` (**Shift+F11**) – This will reverify all abstracts in the selected Batch
-  - `Create File` (**F12**) – This will create the file, if the Batch Verify is run just click on Create File and the file wil will be created.
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records
-  - `Reset File Settings` – This will reset the file setting below. The following message will display when clicked:
- `Complete Re-verify` – checking this box will re-verify every record,

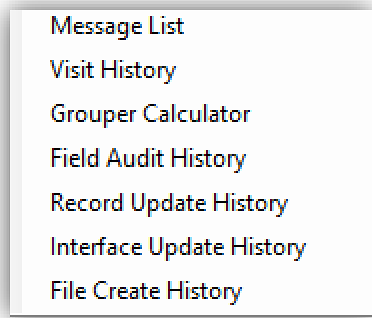
- `Institution Number` – enter the institution number that is to be sent or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- `Batch Year` – this will be blank the first time it is used, entering the fiscal year that is being submitted
- `Batch Period` – this will default if previous periods have been submitted/enter the period/or choose from the drop down list
- `Date from` – will populate April 1 for DAD/SDS and will populate with the beginning of the `Batch Period` (cannot enter into this field)
- `Date to` – will populated the last date based on the `Batch Period` (cannot enter into this field)
- `Care Type –` Drop down menu – A-All Cases defaults



  - A-C19 – Covid-19 Cases – if you choose this option the date from and date to fields will open and dates can be entered

- `Correction in Batch` – Total corrections in batch
- `Corrections Remaining` – Any corrections not included in correction file
- `Total Corrections In Period` – Total Corrections in Period
- `Invalid (Is Valid E or N) –` This displays the number of abstracts that have “N” or “E” in the is ‘Is Valid’ field on the abstract.
- `Verified (Is Valid W or Y) –` This displays the number of abstracts that have “W” or “Y” in the is ‘Is Valid’ field on the abstract
- `CIHI File Location` – Identifies where the file is located, can click on the link and will take you to the correction/deletion file.
-  - Abstract menu – used when fixing abstracts with Errors and Warnings
  -  - `Save` **(F7)** – Saves the record
  -  - `Undo` – Undoes any changes to the record
  -  - `Record Verify` **(F11**) – Verifies the Record
  -  - `Report Manager`(**F10**) – Opens Select Report

-  - `Tools`– Click on the different options to change the view at the bottom of the abstract



  - `CIHI File Location –` Displays the file location, clicking on the link will open the location the file is located.

NACRS Level 0/1/2/3 Correction/Deletion

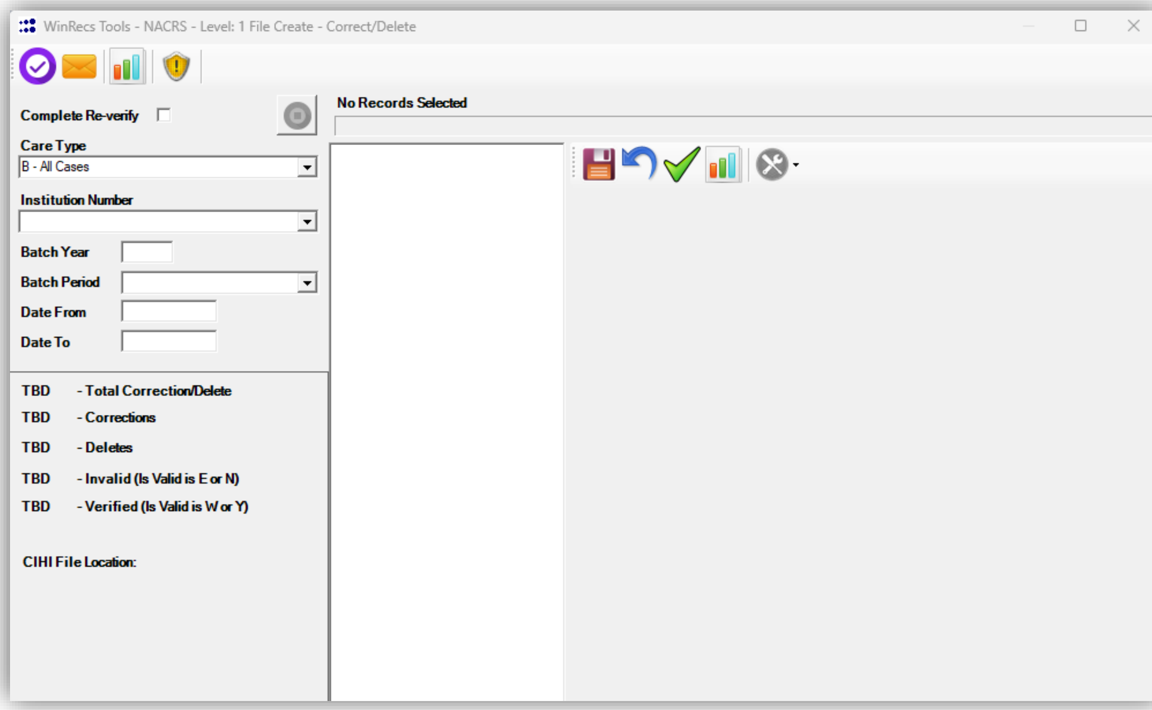
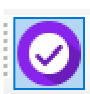
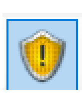
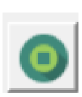
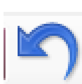
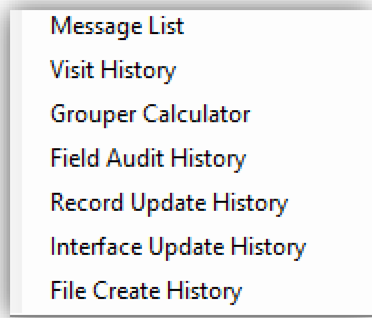


Figure 136 – File Management – NACRS Level 0/1/2/3 CIHI Correction File Screen

-  - `Batch Verify` (**Shift+F11**) – This will reverify all abstracts in the selected Batch
-  - `Create File` (**F12**) – This will create the file, if the Batch Verify is run just click on Create File and the file wil will be created.
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records
-  - `Reset File Settings` – This will reset the file setting below. The following message will display when clicked:
- `Complete Re-verify` – checking this box will re-verify every record.
- `Care Type` - allows the user the option(not included in Level 0):
  - `B All Cases` – will validate for all Care Types (Level 3 only)
  - `B-C Clinic` – will validate for all MIS codes with a 'Clinic' Care Types (Level 3 only)

  - `B-D Day Surgery` – will validate for all MIS codes with a Day Surgery Care Type (Level 3 only)
  - `B-E Emergency` – will validate for all MIS codes with an Emergency Care Type (Level 1, 2, 3)
  - `B-E-O ED Opioid Cases –` will validate for all Opioid Cases only (Level 1, 2, 3)
- `Institution Number` – enter the institution number that is to be sent or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- `Batch Year` – this will be blank the first time it is used, entering the fiscal year that is being submitted
- `Batch Period` – this will default if previous periods have been submitted/enter the period/or choose from the drop down list
- `Date from` – this will populate with the beginning of the `Batch Period` (cannot enter into this field)
- `Date to` – will populated the last date based on the `Batch Period` (cannot enter into this field)
- `Total Correction/Delete` – Total Corrections/Deletions for this Batch Period
- `Corrections` – Total Corrections in the Batch Period
- `Deletes` – Total Deletions in the Batch Period
- `Invalid (is Valid is E or N)` – Total records that have errors or not processed in the Batch Period
- `Verified (Is Valid W or Y)` – Total records that have warnings or are verified in the Batch Period.
- `CIHI File Location` – Identifies where the file is located, can click on the link and will take you to the correction/deletion file.
-  - Abstract menu – used when fixing abstracts with Errors and Warnings
  -  - `Save` **(F7)** – Saves the record
  -  - `Undo` – Undoes any changes to the record
  -  - `Record Verify` **(F11**) – Verifies the Record
  -  - `Report Manager`(**F10**) – Opens Select Report

-  - `Tools`– Click on the different options to change the view at the bottom of the abstract



Create Correction

To create the correction file is the same as the submission file process but the file naming will be for a correction and will be sent to CIHI as a correction. Click here: *Creating a Correction File*

4.2.4 No Separations File – DAD

If an institution has no discharges for a specific period, CIHI requires that a "No Separation File" be submitted to advice that no abstracts to that reporting period.

Run the Create Submission the following message will appear:

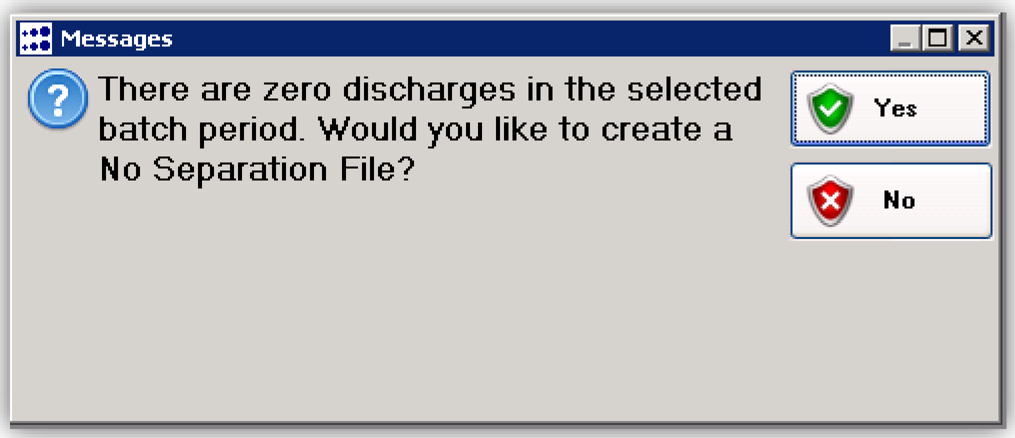


Figure 137 – File Management – Zero discharges in the selected batch period message

Clicking **YES** – will create a No Separation File

Clicking **NO** – will go back to the **File Management** screen

4.2.5 CIHI Deletion File – DAD & NACRS

A deleted record that has previously been submitted to CIHI will remain in the Purge/Recover module until a deletion file or submission/correction file (depending on the module) is run. The file can be deleted via the Abstracting module or via the Modify Chart module.

In the Abstracting module, the following messages will appear when a submitted chart is deleted:

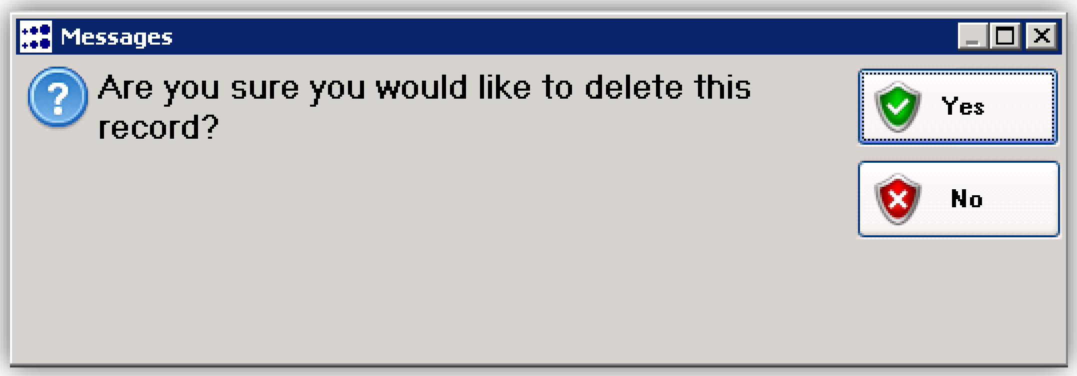


Figure 138 – File Management – Deletion Confirmation Message

Click **YES** will continue with the process

Click **NO** it will go back to the abstract

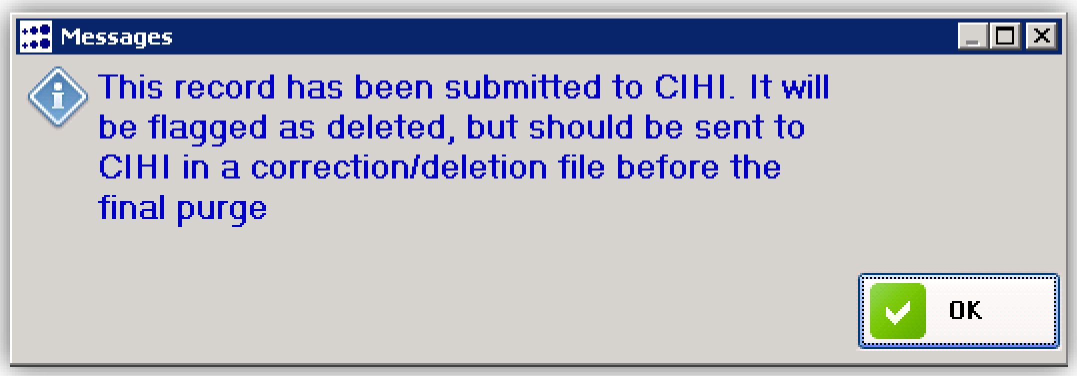


Figure 139 – File Management – Deletion Confirmation Message

Click **OK** and the abstract will be sent to the purge file.

DAD/SDS Deletion File

The file will be created as a deletion file.

Tools → File Management → DAD → CIHI Deletion File

Tools → File Management → SDS → CIHI Deletion File

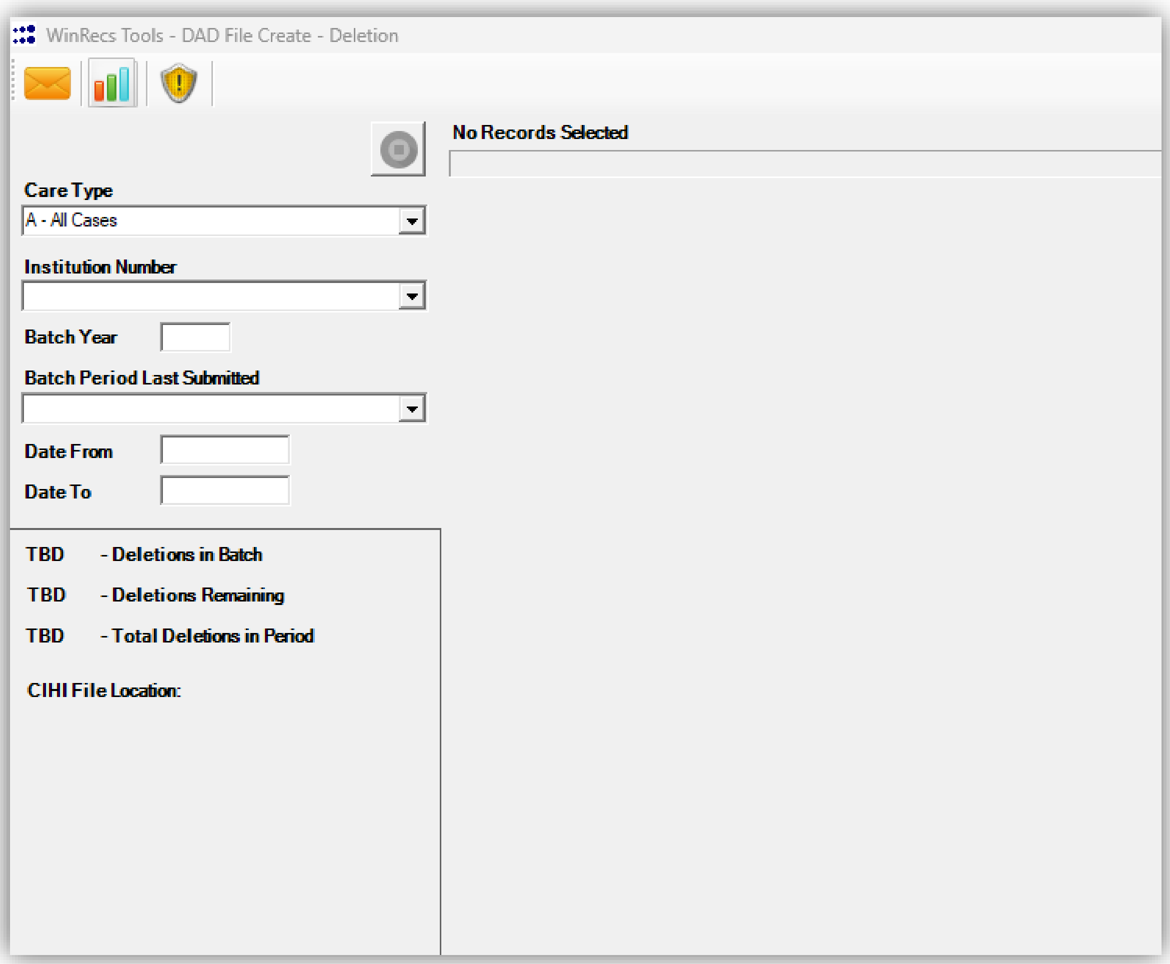
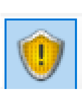
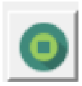


Figure 140 – File Management – DAD/SDS Deletion

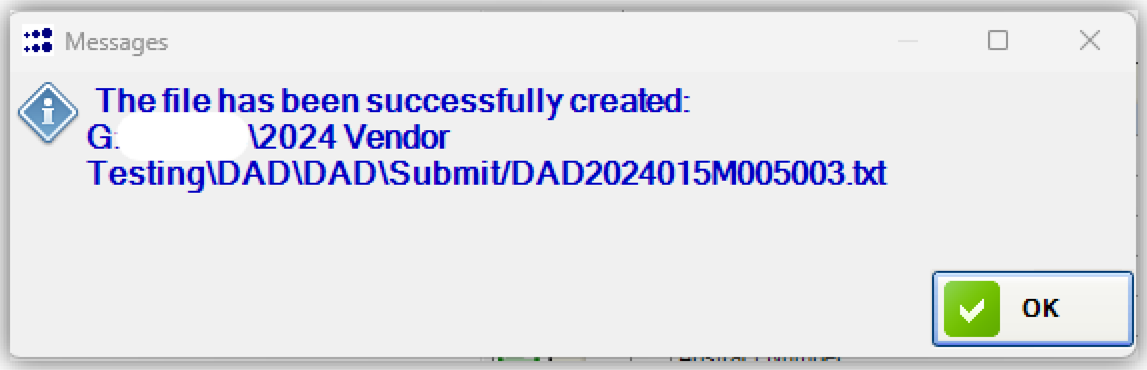
-  - `Create File` (**F12**) – This will create the file
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records

-  - Reset File Settings – This will reset the file setting below. The following message will display when clicked:
- Care Type - allows the user the option:
  - A All Cases – will validate for all Cases
  - A-C19-Covid-19 Cases – will send in COVID 19 deletions.
- Institution Number – enter the institution number that is to be sent or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- Batch Year –enter the batch year of the deletions being submitted
- Batch Period Last Submitted – will enter the last period that has been submitted to CIHI, it will pull all deletions from April 1 to end of that Batch period for the Batch year chosen
- Date from – this will populate with the beginning of the Batch Year
- Date to – will populated the last date based on the Batch Period
- Deletions in Batch – Total deletions in this Batch
- Deletions Remaining – Total deletions not included in the file for this Batch Period
- Total Deletions in Period – Total Deletions in the Batch Period

CIHI File Location – Identifies where the file is located, can click on the link and will take you to the correction/deletion file.

Create DAD/SDS Deletion File

- Select the following fields:
  - Care Type
  - Institution Number
  - Batch Year
  - Batch Period – this will auto populate the last period submitted to CIHI
  - Date From – can be adjusted but not necessary.
  - Date to – can be adjusted but not necessary.
  - Press  Create File or **[F12]**
  - Once the submission process is complete, the following message will display:



NACRS Level 1/2/3 Deletion File

The file is created and sent as part of the correction file.

Tools → File Management → NACRS Level 1/2/3 → CIHI Correction/Deletion File

Go to: Create Submission **on how to create the file.**

4.2.6 CIHI Detailed Error File – DAD

The function is used to flag CIHI submitted records as pending corrections. Importing the DAD error file allows user to print the errors for corrections.

1. Save the CIHI Detailed Error File received from CIHI on the computer where it is designated for the facility.
2. **Tools → File Management → DAD → CIHI Detailed Error File**

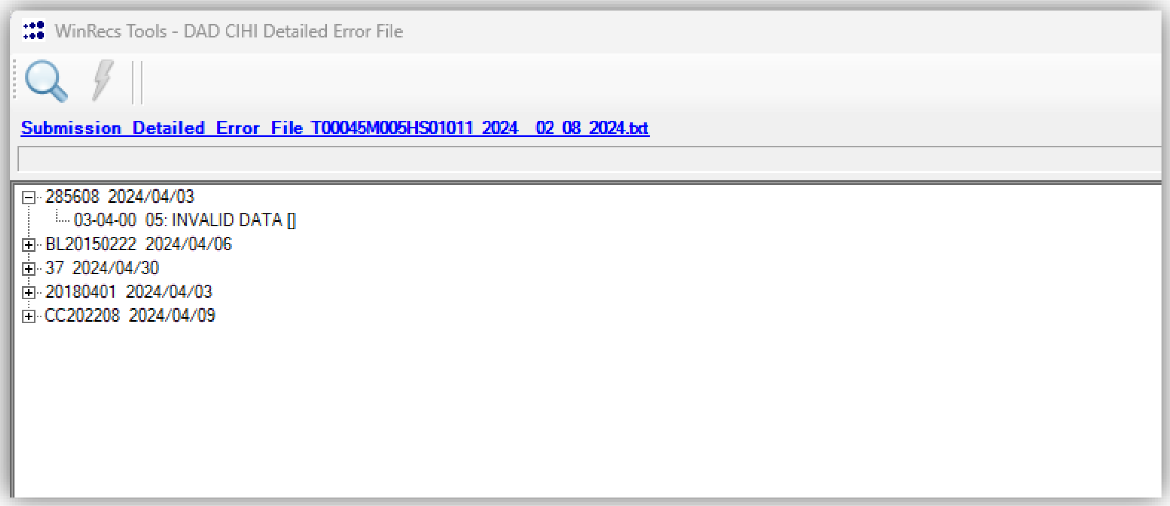
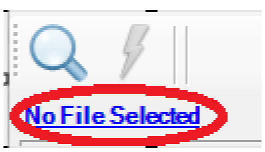


Figure 141 – File Management – CIHI Detailed Error File

3. Press the  to search for the CIHI file and the file directory will display.
4. Once the file has been located press OK and the file name will display in the top. Press the  to process the report and DAD CIHI Errors are imported.
5. 

 - Displays the file path of the file you are processing.
6. The following message will display:

7. Once the file is finished processing the errors will display.

4.2.7 CIHI Electronic Rejection/Data Quality Warning File - NACRS

This file flags the NACRS files that have been rejected due to errors by CIHI. Once the file is imported it will reset the submission status of rejected records. After the files have been corrected and saved the records will be submitted to CIHI.

1. Save the CIHI Electronic Rejection/Data Quality Warning file from CIHI onto a shared drive (as per hospital decision).
2. **Tools → File Management → NACRS → CIHI Electronic Rejection/Data Quality Warning File**

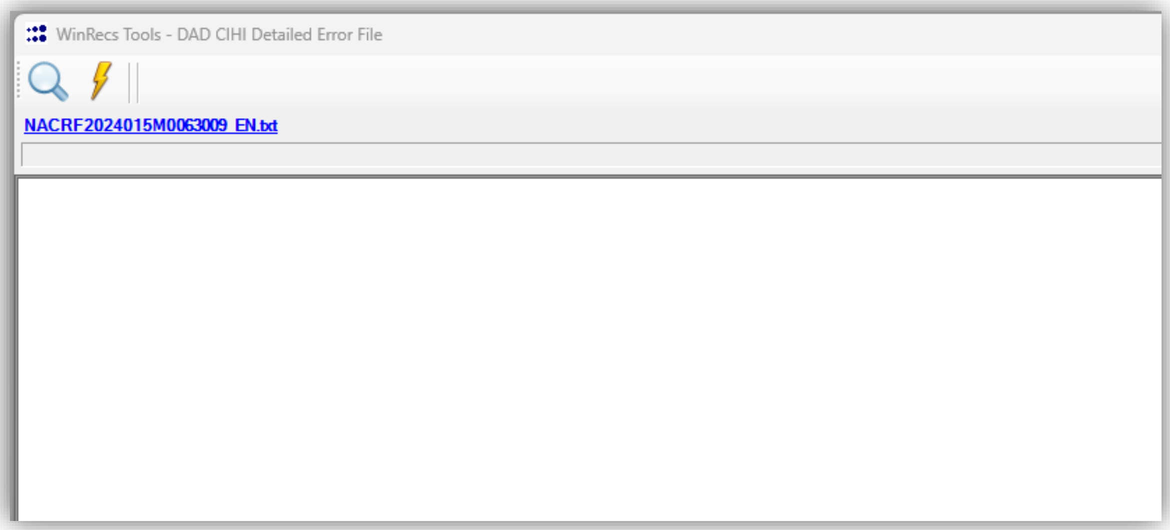
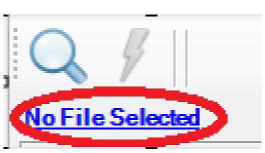
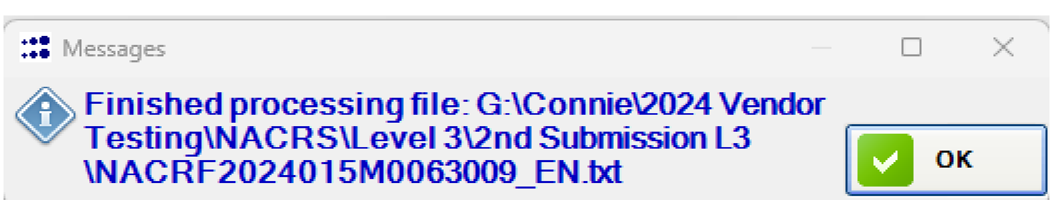


Figure 142 - File Management – CIHI Electronic Rejection Data Quality Warning

3. Press the  to search for the CIHI file and the file directory will display.
4. Once the file has been located press OK and the file name will display in the top. Press the  to process the report.
5. 

 - Displays the file path of the file you are processing.
6. The following message will display when done and the error messages will display and the visits will have the submission status reset:



4.2.8 Manual Reset of Submission Status - NACRS

When correcting a rejected NACRS record without having imported the NACRS Rejection file from CIHI, the user will have to reset the submission status on each abstract as they are corrected.

To Manually Reset the Submission Status:

- Open the rejected record
- Correct the error(s)
- Select File Settings/Re-Set File Create Status

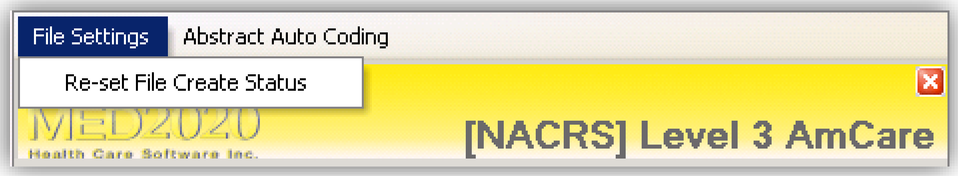


Figure 143 – Re-set File Create Status

- The following message will appear:

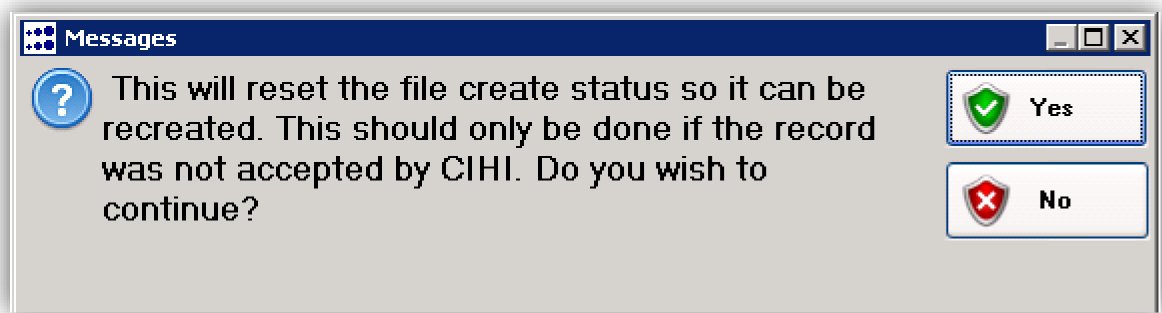


Figure 144 – Re-set File Create Status Message

- Clicking ‘Yes’ will reset the submission status to a ‘N’
- Click ‘No’ will take you back to the abstract

The ‘Is Abstract Submitted’ flag will now change to ‘N’ and the record can be resubmitted via Create Submission

4.2.9 NACRS CJRR Submission/Corrections/Deletions

NACRS CJRR Visit is submitted as a separate Level 3 Submission. The Level 3 submission file must be accepted by CIHI prior to submitting the NACRS CJRR file.

- Run the Level 3 Submission file and the NACRS CJRR file will be created at the same time.
- Click on Create File:
- The following will display the number of NACRS L3 abstracts and the number of NACRS-CJRR L3 abstracts.

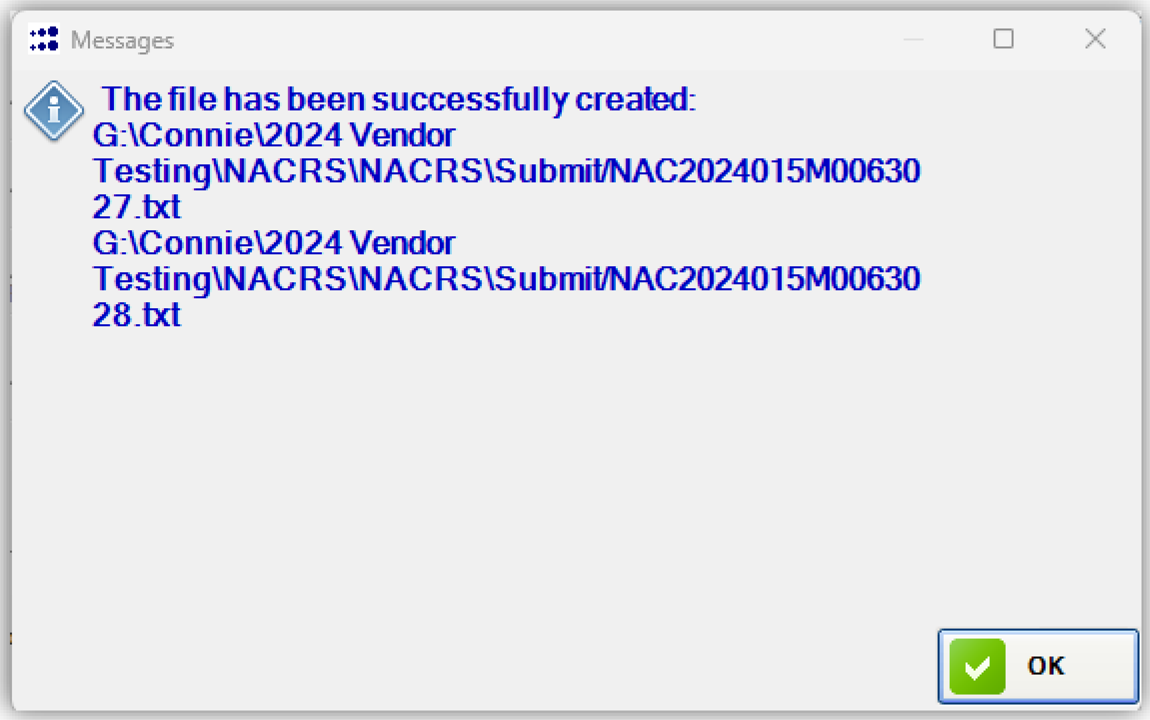


Figure 145 – NACRS CJRR Submission

- When the file is created, 2 files will be created the first will be the Level 3 submission file, the second is the NACRS CJRR submission file.

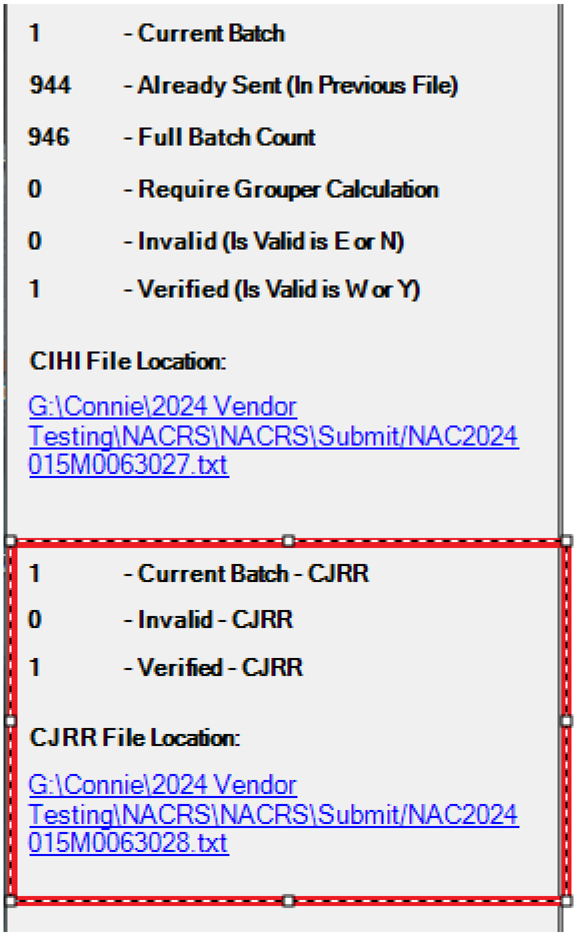


Figure 146 – NACRS CJRR Submission Files Created

- `Current Batch` – number of CJRR records in this Batch Period
- `Invalid – CJRR` – number of records that are invalid in this Batch Period
- `Verified – CJRR` – number of records that are verified and included in the file for this Batch Period
- `CJRR File Location` – Location of the CIHI CJRR file, clicking on link open CIHI CJRR file location.

Please Note: The level 3 file with the Amcare Visits (lowest sequence number) must be submitted and accepted by CIHI prior to sending the NACRS CJRR File. The Record Type for the new CJRR visit is 5.

Note: The level 3 file with the Amcare visits (lowest sequence number) must be submitted and accepted by CIHI prior to sending the NACARS CJRR file. The Record Type for new CJRR records is 5.

NACRS CJRR Corrections

- Any changes to the NACRS CJRR submitted cases will also update the Level 3 visit when saved.
- When a NACRS Level 3 correction file (Record Type 4) is created and submitted to CIHI this will in turn delete the associated CJRR file. The NACRS CJRR file will need to send as a Record Type 5 new. When the correction file is run, there will be 2 files created:
    - NACRS Level 3 Correction File
    - NACRS CJRR file – with Record type 5 (new)

    These files will need to be submitted as above, the Level 3 correction file first and once accepted by CIHI the NACRS CJRR file.

NACRS CJRR Deletion

- When a NACRS Level 3 abstract and it's associated CJRR file is deleted and is submitted as a Correction file. The deleted visit will be picked up as a Record Type 2. The Record Type 2 will delete both the Level 3 Amcare visit and the associated NACRS CJRR visit.
- If the NACRS CJRR visit is only deleted and the Level 3 Amcare remains. The correction file will create a Record Type 4. This will correct the Level 3 Amcare and delete the NACRS CJRR visit.

4.2.10 File Management – Other Messages

The following messages that may occur at different times of the File Management process.

1. **No File Path for CIHI Files** - If the user tries to save the verification result file to a location that does not exist, WinRecs will prompt the user to create the folder. This means there is no `File Path` in the `CIHI Directory` in the `Institution Profile`

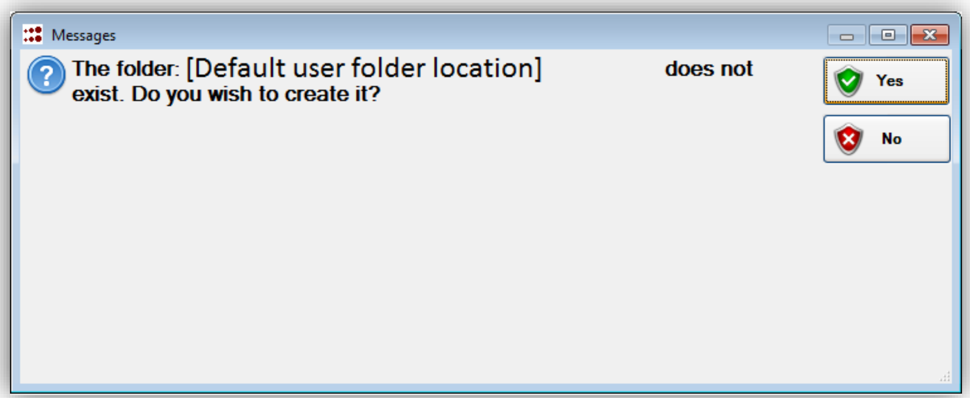


Figure 147 – File Management – Default user Location does not Exist Message

Clicking **YES** – will create a folder for you in the Default user folder location.

Clicking **NO** – will take you back to the File Management screen

2. **Record Being Accessed** – Charts of the submitted period are being accessed, the process cannot be completed till the abstracts are closed.

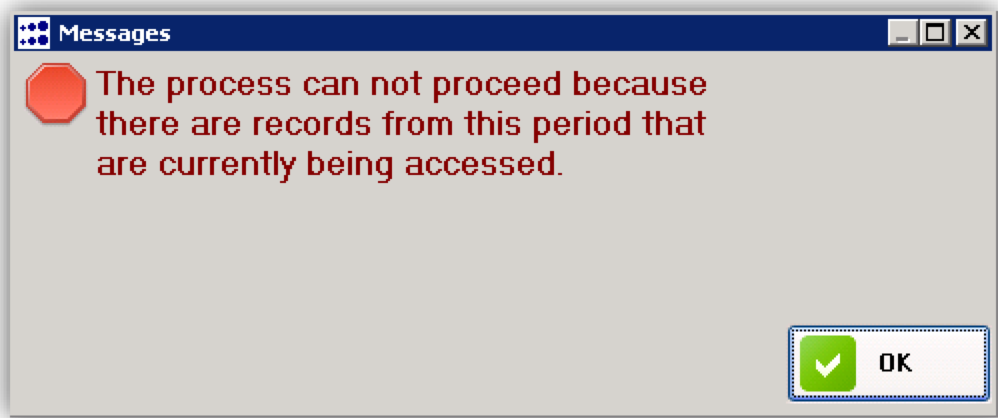


Figure 148 – File Management – Record from this period being accessed

3. **Date Range Includes Future Date** - A message will be displayed to inform you that records outside of the date range will be rejected.

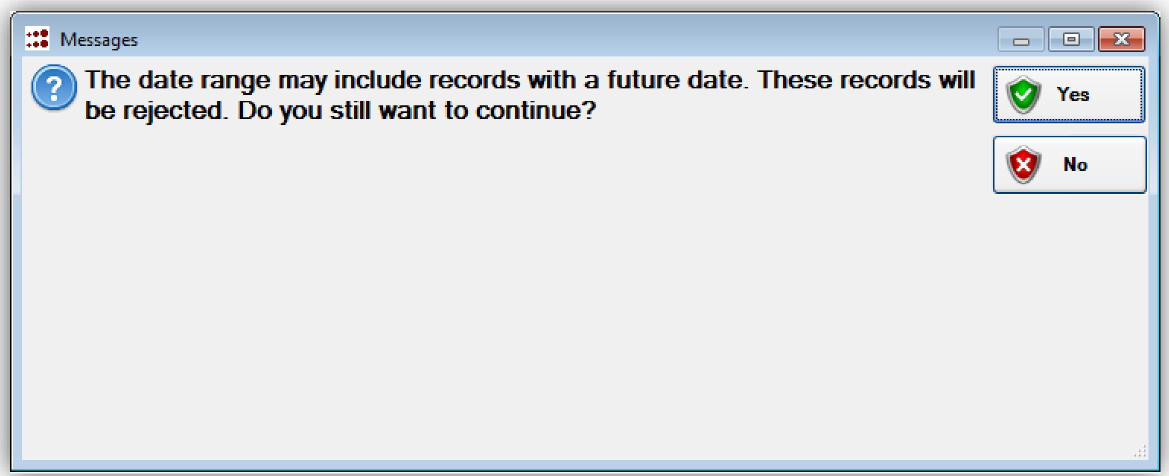


Figure 149 - Confirmation records outside the date range not in submission file

- Click **Yes** to continue submission process
- Click **No** to go back to the File Management screen.

4. **Required Parameters Missing** - If the user forgets to fill in some of the required parameters, the following error message will be displayed.

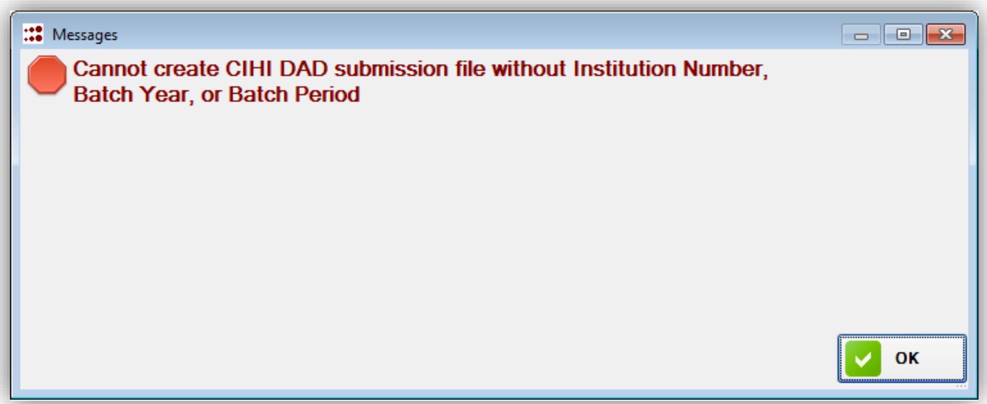


Figure 150 - File creation parameter error

To return to the file creation screen and correct the error

- Click **"Ok"** or Press **[ENTER]**.
- Highlight **No** using the **[TAB]** key, then press **[ENTER]** to cancel the verification.

5. **No Data Found** - If there are no records found for the selected parameters, the following screen will be displayed.

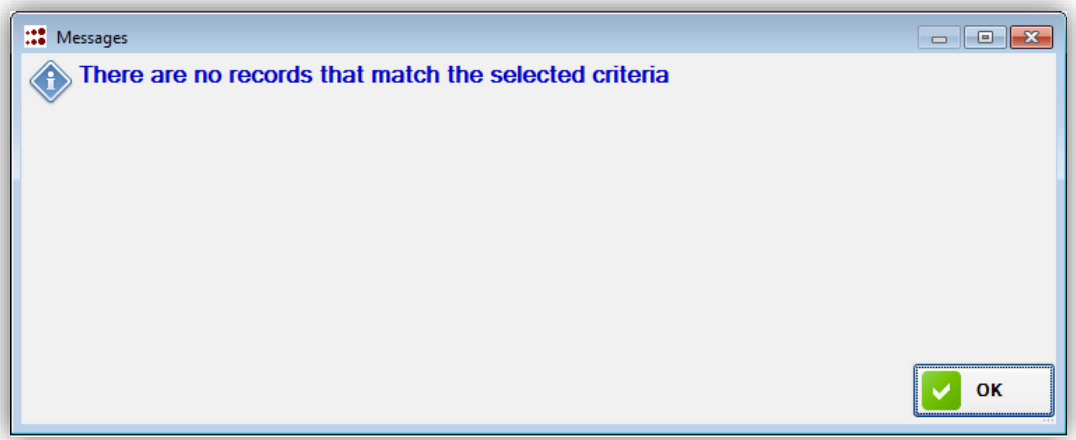


Figure 151 - File creation: No data found

To return to the file creation screen and correct the error:

- Click **"Ok"** or press **[ENTER]**.

6. **No Records Found** - If there are no records found for the selected parameters, the following screen will be displayed.

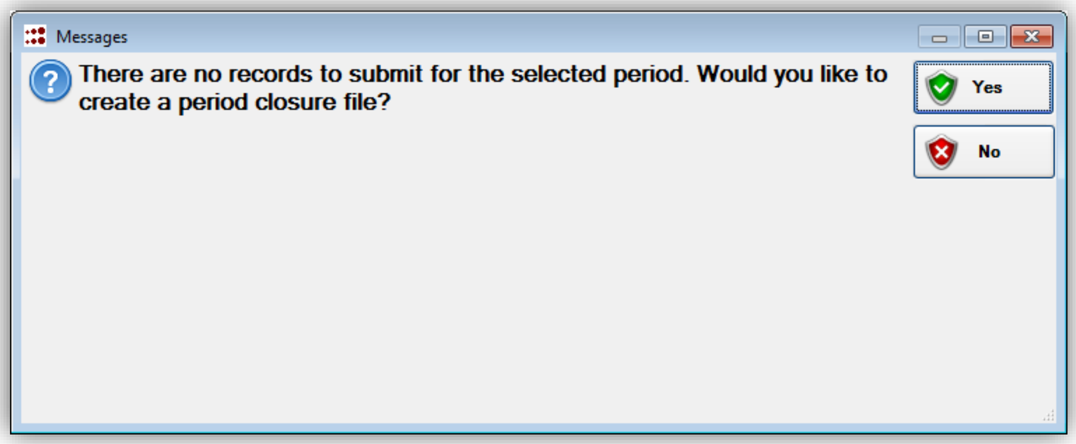


Figure 152 - File creation: No records to submit

- Click **Yes** to create the closure file.
- Click **No** to cancel the process.

4.2.11 CIHI MDS (CCRS) - Submission/Correction/Deletion File

MDS(CCRS) CIHI Insert/Update Data Submission File

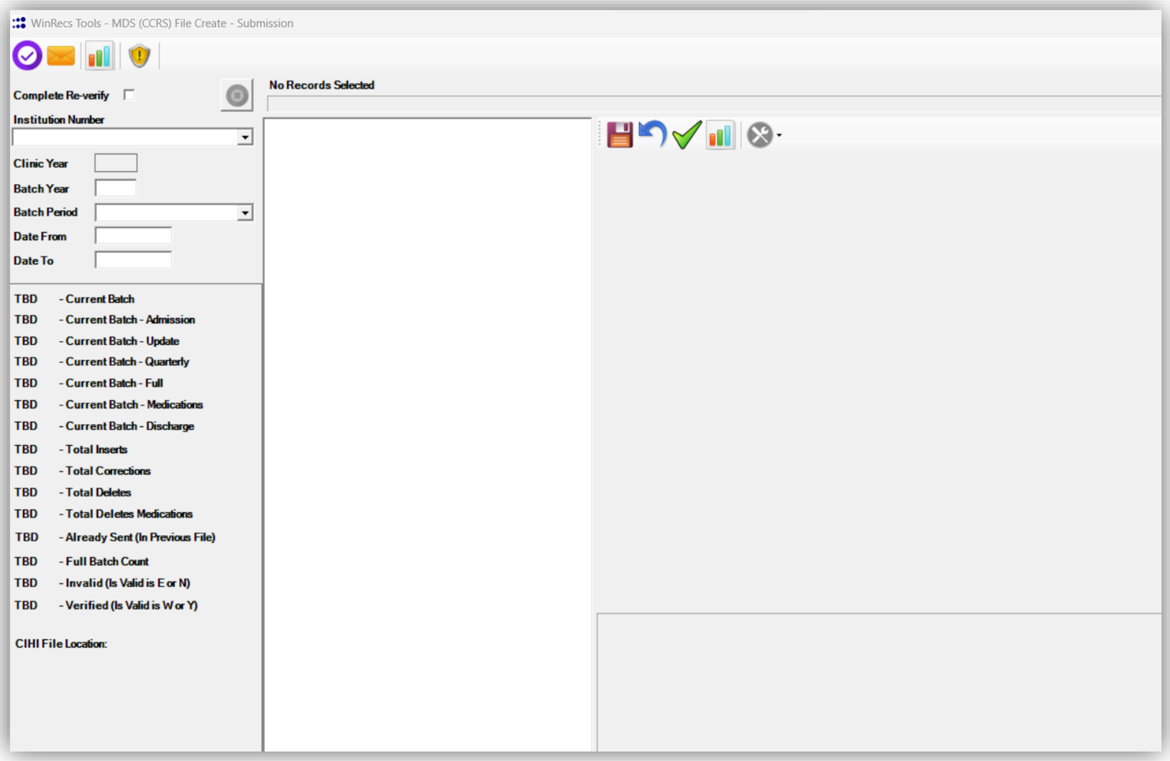
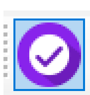
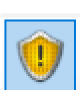
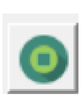
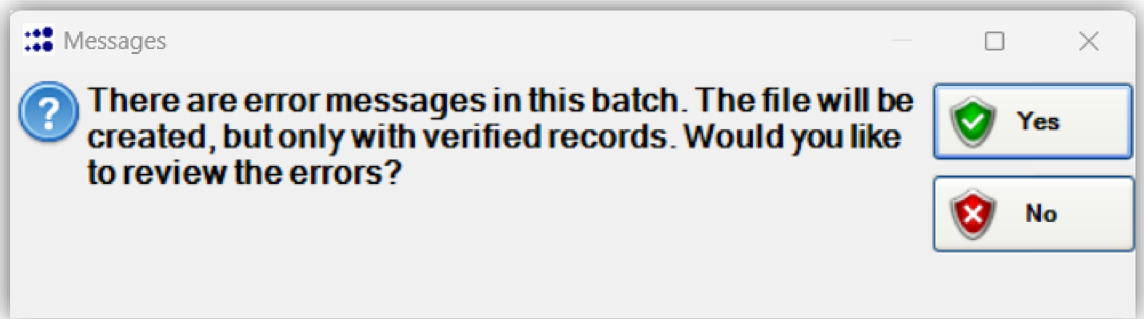


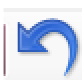
Figure 153 – File Management CIHI Insert/Update Data Submission File

-  - `Batch Verify` (**Shift+F11**) – This will reverify all abstracts in the selected Batch
-  - `Create File` (**F12**) – This will create the file, if the Batch Verify is run just click on Create File and the file wil will be created.
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records
-  - `Reset File Settings` – This will reset the file setting below. The following message will display when clicked:
- `Complete Re-verify` – checking this box will re-verify every record.

- `Institution Number` – enter the institution number that is to be sent or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- `Clinic Year` – this is the year the edits will be triggered, this field cannot be changed.
- `Batch Year` – this will be blank the first time it is used, entering the fiscal year that is being submitted
- `Batch Period` – this will default if previous periods have been submitted/enter the period/or choose from the drop down list
- `Date from` – this will populate with the beginning of the `Batch Period` (cannot enter into this field)
- `Date to` – will populated the last date based on the `Batch Period` (cannot enter into this field)
- `Current Batch` – the number of assessments that are contained with in the Batch Period
- `Current Batch- Admission` – the number of Admission assessments that are contained with in the Batch Period
- `Current Batch - Update` – the number of Update assessments that are contained with in the Batch Period
- `Current Batch - Quarterly` – the number of Quarterly assessments that are contained with in the Batch Period
- `Current Batch - Full` – the number of Full assessments that are contained with in the Batch Period
- `Current Batch - Medications` – the number of Medication assessments that are contained with in the Batch Period
- `Current Batch – Discharge` – the number of Discharge assessments that are contained with in the Batch Period
- `Total Inserts` – number of new assessments included in the file
- `Total Corrections` – number of assessments that are being sent as corrections
- `Total Deletes` - number of assessments that are being sent as deletions
- `Total Deletes Medications` – number of medication assessments that are being sent as deletions
- `Already Sent (In Previous File)` – number of assessments that have been previously submitted
- `Full Batch Count` – total # assessments in the CIHI file
- `Invalid (Is Valid E or N)` – This displays the number of assessments that have “N” or “E” in the is ‘Is Valid’ field on the abstract. During the File Create process a message will display asking the following:



- "Yes" will display the error messages and give the ability to fix the errors
- "No" will not display the errors and the file will be created without the errors.

- `Verified (Is Valid W or Y)` – This displays the number of asessments that have "W" or "Y" in the is 'Is Valid' field
- CIHI File Location: - displays the file location of the CIHI file.
-  - Abstract menu – used when fixing assessments with Errors and Warnings
  -  - `Save` **(F7)** – Saves the record
  -  - `Undo` – Undoes any changes to the record
  -  - `Record Verify` **(F11**) – Verifies the Record
  -  - `Report Manager`(**F10**) – Opens Select Report
  -  - `Tools`– Click on the different options to change the view at the bottom of the abstract

To verify the records to check for errors without creating the file ensure the `Complete Re-verify` button is checked and press  or [F11]

To verify the records to check for errors and create the submission file press  or [F12]. If there are errors in the file, the submission file will not create.

Please see Verifying Records for more information.

MDS(CCRS) Reset Submission Status

When an assessment has been sent to CIHI and has an error, CIHI will send the record back as a rejection. These assessments will need to be corrected and sent in as a new submission. In order, to send it in as a new submission the assessments will need to be reset.

> **Please note: The CIHI Re-set File Create Status needs to be set the [User Profile/Module Settings/MDS]()**

To Manually Reset the Submission Status:

- Open the rejected assessment
- Correct the error(s)
- Select File Settings/Re-Set File Create Status

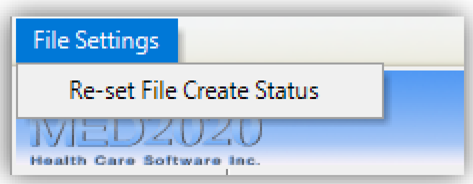


Figure 154 – Re-set File Create Status

- The following message will appear:

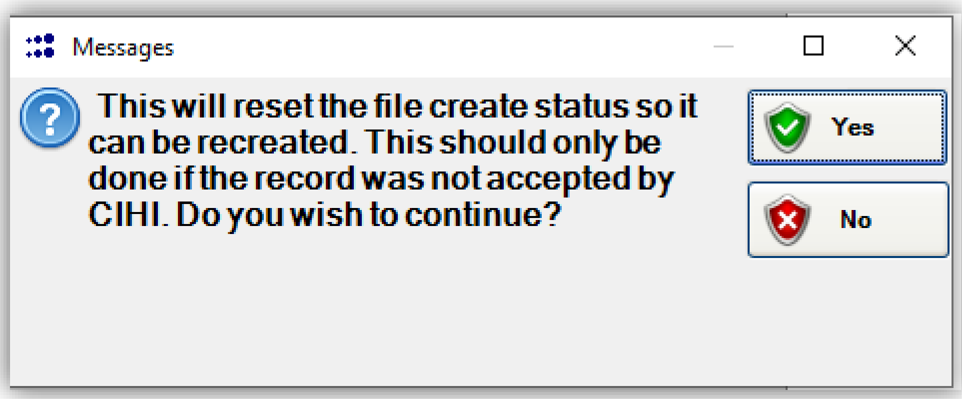


Figure 155 – Re-set File Create Status Message

- Clicking 'Yes' will reset the submission status to a 'N'

- Click ‘No’ will take you back to the assessment
- Press [F6]/[F7] to save the assessment.
- The ‘Is Abstract Submitted’ flag will now change to ‘N’ and the record can be resubmitted via a CIHI Submission File – MDS (CCRS)

MDS(CCRS) Re-set Record Update Status

When an assessment is saved or created/saved, using this feature allows the user to reset the Record Update Status so the interface can still populate the abstract. This option will only be available if the assessment has NOT been submitted to CIHI.

To Manually Reset Record Update Status :

- Open the assessment
- Enter values and save the assessment
- Select Action/Re-Set Record Update Status

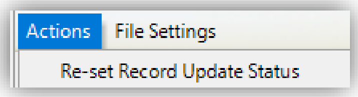
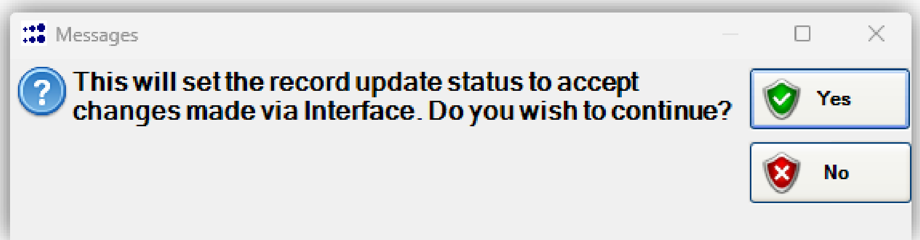
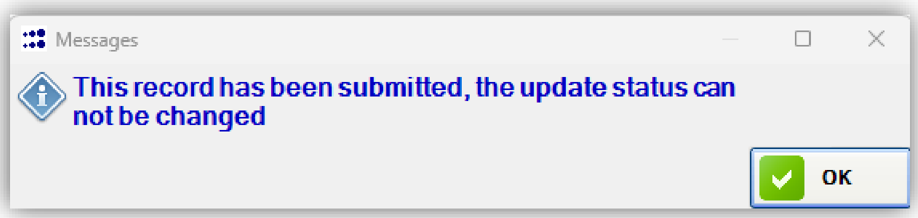


Figure 156 – Re-set Record Update Status

- The following message will appear:



- Clicking ‘Yes’ will re-set the record update status to a ‘N’
- Click ‘No’ will take you back to the assessment
- Press [F6]/[F7] to save the assessment.
- If an assessment is submitted then the following message will display:



MDS(CCRS) Re-set File Correct Staus

When a submitted assessment is saved the assessment is flagged as a correction. Ising this feature allows the user to reset the 'Is File Corrected' flag from a "P" waiting to be set as a correction to a "N" – No correction so the corrected assessment is not sent to CIHI as a correction.

To Manually Re-set File Correct Status :

- Open the submitted assessment
- Make changes to the assessment and save the assessment
- Select Action/Re-Set File Correct Status

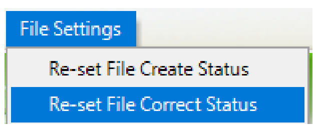
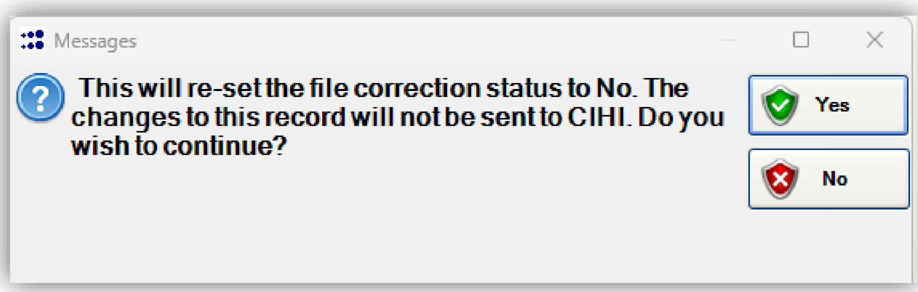


Figure 157 – Re-set File Correct Status

- The following message will appear:



- Clicking 'Yes' will re-set the 'Is File Corrected" = 'N'
- Click 'No' will take you back to the assessment and leave the 'Is File Corrected" = P
- Press [F6]/[F7] to save the assessment.
- If an assessment already has a "Is File Corrected" = 'N" then the following message will display:

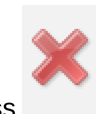
MDS(CCRS) CIHI Corrected Submitted Assessment File

An assessment that has been submitted and a change is made will trigger the assessment as a correction. The correction is submitted via a CIHI Submission File – MDS (CCRS) and the record is flagged within the submission file as a correction.

MDS(CCRS) CIHI Deleted Submitted Assessment

An assessment that has been submitted and is deleted, the deletion will be put into the **Purge/Recover** module is submitted via a CIHI Submission File – MDS (CCRS) and the record is flagged within the submission file as a deletion.

To delete a submitted MDS (CCRS) Assessment:

- Open the record that needs deletion and Press  or [F9] and the following message will display:

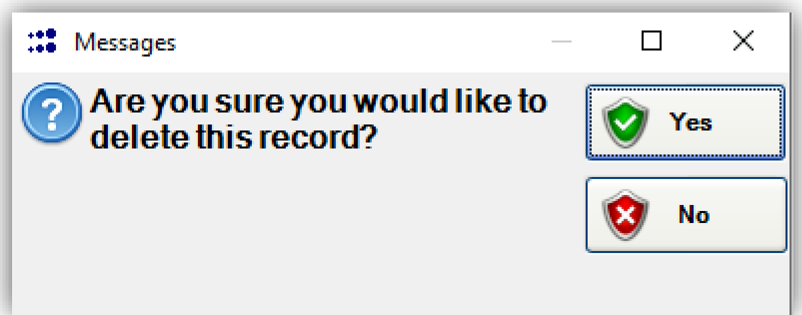


Figure 158 – Deleting an Assessment Message

Yes - will send the record to the **Purge/Recover** module

No - will not delete the record.

- The following message will appear when the record has been submitted:

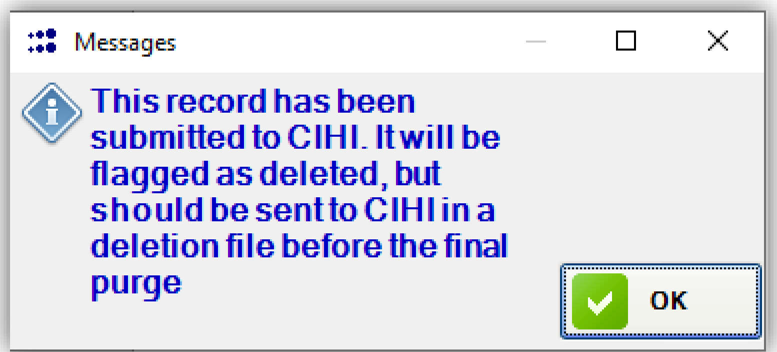


Figure 159 – Deleting an MDS Submitted Assessment Message

- Please note that submitted assessments mut be deleted in reverse order of submission (Discharge before Quarterly, Quarterly before Admission etc.) If you try to delete a submitted assessment and the assessment following it has been submitted the following message will display:

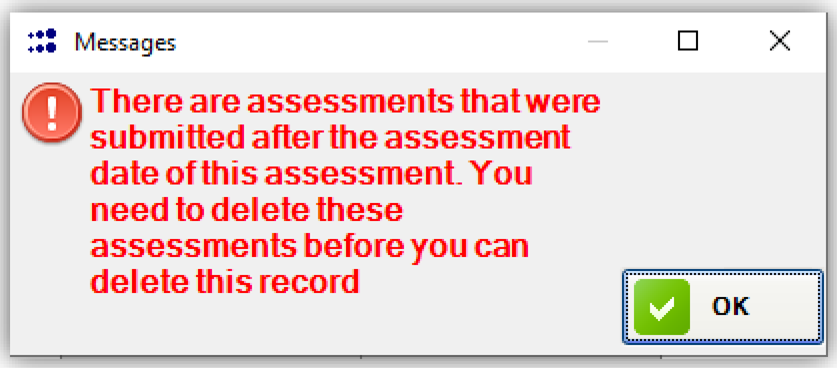


Figure 160 – Deleting an MDS Submitted Assessment Message

Once a Submission File is run, the deleted record will automatically purge from the **Purge/Recover** Module.

4.2.12 CIHI Rehabilitation (NRS) Submissions/Corrections/Deletions

NRS - CIHI Insert/Update Data Submission File

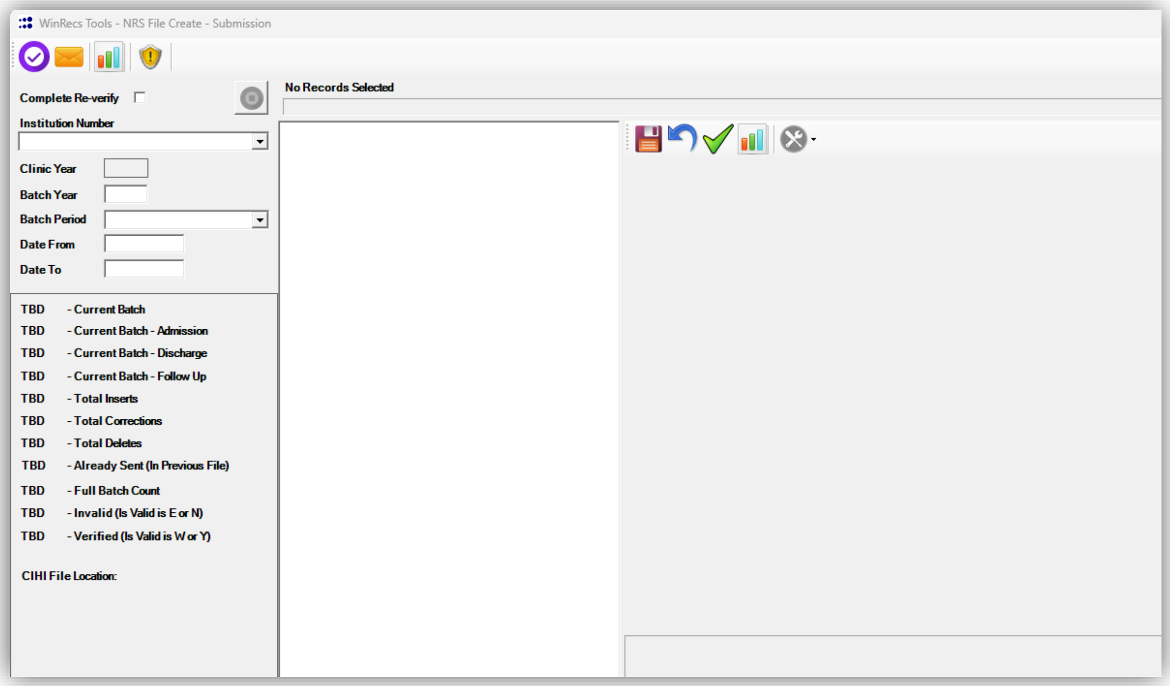
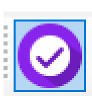
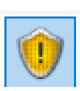
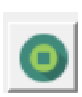
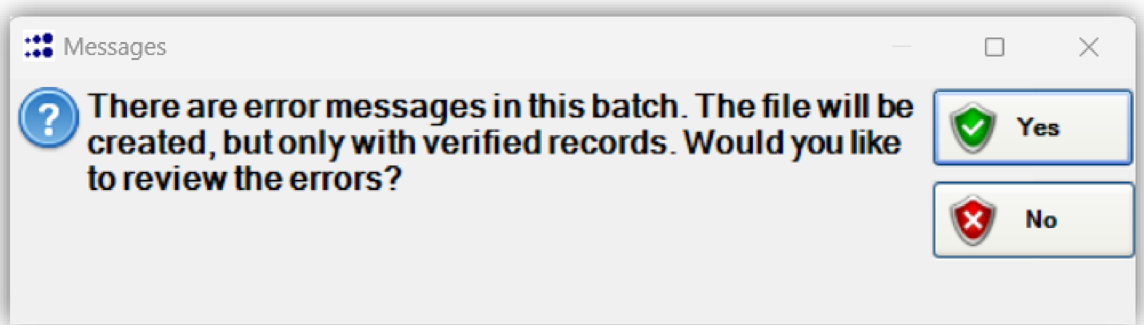


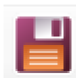
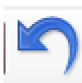
Figure 161 – Rehabilitation (NRS) CIHI Submission Screen

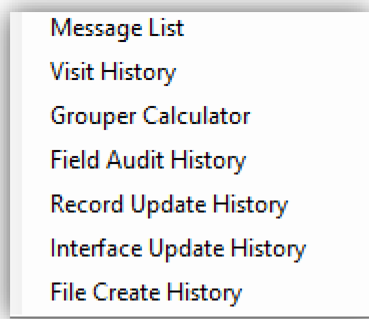
-  - `Batch Verify` (**Shift+F11**) – This will reverify all abstracts in the selected Batch
-  - `Create File` (**F12**) – This will create the file, if the Batch Verify is run just click on Create File and the file wil will be created.
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records
-  - `Reset File Settings` – This will reset the file setting below. The following message will display when clicked:

- Complete Re-verify – checking this box will re-verify every record, not checking the box will not
- Institution Number – enter the institution number that is to be sent or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- Clinic Year – this is the year the edits will be triggered, this field cannot be changed.
- Batch Year – this will be blank the first time it is used, entering the fiscal year that is being submitted
- Batch Period – this will default if previous quarters have been submitted/enter the quarter/or choose from the drop-down list
- Date From – this will default the dates of the Batch Period and can be changed
- Date To – this will default the dates of the Batch Period and can be changed.
- Current Batch – the number of assessments that are contained with in the Batch Period
- Current Batch- Admission – the number of Admission assessments that are contained with in the Batch Period
- Current Batch - Discharge – the number of Discharge assessments that are contained with in the Batch Period
- Current Batch – Follow Up – the number of Follow-Up assessments that are contained with in the Batch Period
- Total Inserts – number of new assessments included in the file
- Total Corrections – number of assessments that are being sent as corrections
- Total Deletes - number of assessments that are being sent as deletions
- Already Sent (In Previous File) – number of assessments that have been previously submitted
- Full Batch Count – total # assessments in the CIHI file
- Invalid (Is Valid E or N) – This displays the number of assessments that have "N" or "E" in the is 'Is Valid' field on the abstract. During the File Create process a message will display asking the following:



- "Yes" will display the error messages and give the ability to fix the errors
- "No" will not display the errors and the file will be created without the errors.

- `Verified (Is Valid W or Y) –` This displays the number of asessments that have "W" or "Y" in the is 'Is Valid' field
- CIHI File Location: - displays the file location of the CIHI file.
-  - Abstract menu – used when fixing assessments with Errors and Warnings
  -  - `Save` **(F7)** – Saves the record
  -  - `Undo` – Undoes any changes to the record
  -  - `Record Verify` **(F11**) – Verifies the Record
  -  - `Report Manager`(**F10**) – Opens Select Report
  -  - `Tools`– Click on the different options to change the view at the bottom of the abstract



NRS – Data Process Rules

- An admission assessment must be submitted before a discharge assessment.
- An admission and discharge assessment must be submitted before a follow-up assessment (optional to record).
- If an encounter requires deletion, the assessments must be deleted in the reverse order (ie: follow-up, discharge, admission).

NRS – Record Validation and Submission Date

- This date will be updated annually by MED2020 via the annual fiscal year update.
- All assessments submitted after the record validation date must follow the new fiscal year edits.

- Any submission file created after the Record Validation and Submission Date, regardless of the fiscal year being processed, will have the current fiscal year file specifications applied.

NRS – Verification and Submission of Assessments

- For Verification go to *Verification Only*
- For Submission go to *Create Submission*

NRS – Process NRS Admit/Discharge Together

Go to Options/Institution Profile/Submission/Process NRS Admit/Discharge Together

- A checkmark allows the admission assessment and the related discharge assessment to be processed at the same time for submission.

Note: If the value is blank the assessments will be included in the quarterly submission.

Note: If the Process Together option is chosen this may result in more than one submission file. The naming convention will reflect the fiscal year and quarter applicable to that assessment.

Note: After clicking OK on the Information dialog, the first file listed is displayed at the top of the WinRecs CIHI Submission window. It is important to note the files created on the Information dialog, so you are aware of which files have been saved to you REHAB folder.

NRS - Reset Submission Status

CIHI does not provide an electronic file of rejected records for the NRS database. However, if after submission of data you receive a report of assessments that were rejected, they will not have to be corrected and resubmitted.

Once a record has been successfully validated in WinRecs, and included in a submission file, the “Is Abstract Submitted” flag is set to “Y”. For a rejected record, the user will need to set this field manually.

Please note: The CIHI Re-set File Create Status needs to be set in the User Profile/[OMHRS] Ontario Mental Health Reporting System

To Manually Reset the Submission Status:

- Open the rejected record
- Correct the error(s)

- Select File Settings/Re-Set File Create Status

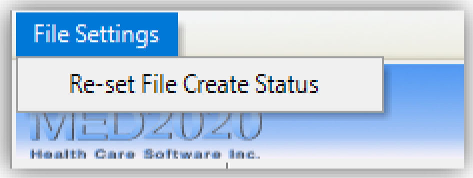


Figure 162 – Re-set File Create Status

- The following message will appear:

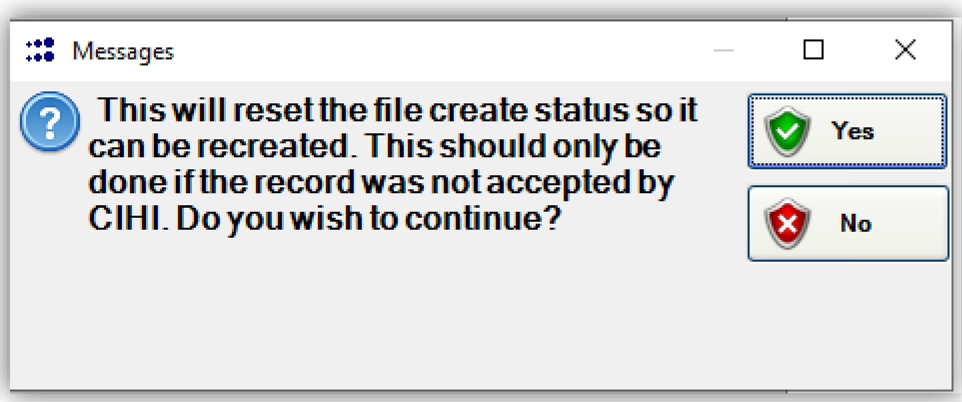


Figure 163 – Re-set File Create Status Message

- Clicking 'Yes' will reset the submission status to a 'N'
- Click 'No' will take you back to the abstract
- Press [F6]/[F7] to save the abstract.
- The 'Is Abstract Submitted' flag will now change to 'N' and the record can be resubmitted via a CIHI Submission File - Rehabilitation (NRS) Submissions

NRS - Re-set Record Update Status

When an assessment is saved or created/saved, using this feature allows the user to reset the Record Update Status so the interface can still populate the abstract. This option will only be available if the assessment has NOT been submitted to CIHI.

To Manually Reset Record Update Status :

- Open the assessment
- Enter values and save the assessment
- Select Action/Re-Set Record Update Status

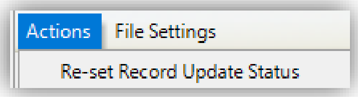
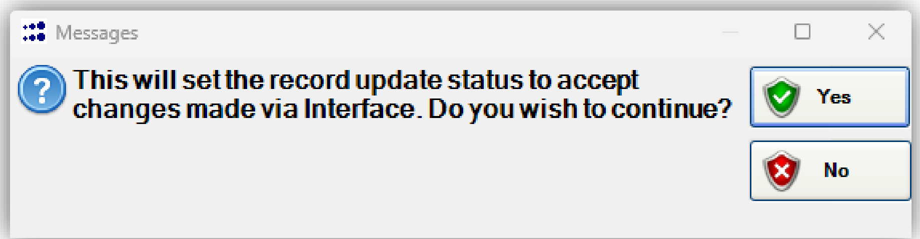
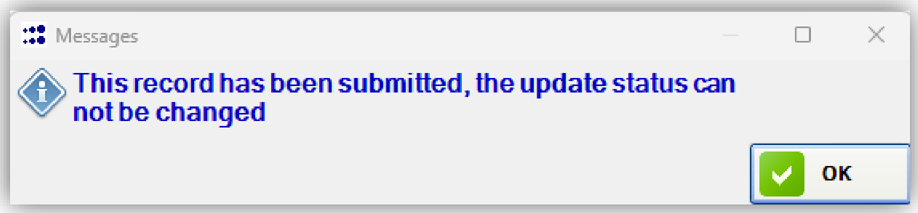


Figure 164 – Re-set Record Update Status

- The following message will appear:



- Clicking ‘Yes’ will re-set the record update status to a ‘N’
- Click ‘No’ will take you back to the assessment
- Press [F6]/[F7] to save the assessment.
- If an assessment is submitted then the following message will display:



NRS - Re-set File Correct Status

When a submitted assessment is saved the assessment is flagged as a correction. Ising this feature allows the user to reset the ‘Is File Corrected’ flag from a “P” waiting to be set as a correction to a “N” – No correction so the corrected assessment is not sent to CIHI as a correction.

To Manually Re-set File Correct Status :

- Open the submitted assessment
- Make changes to the assessment and save the assessment
- Select Action/Re-Set File Correct Status

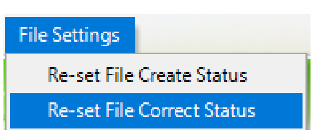
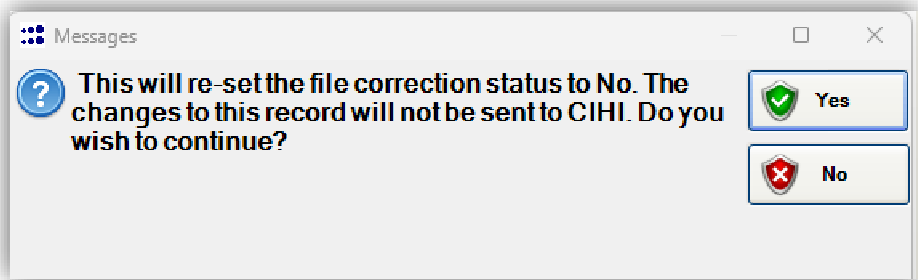
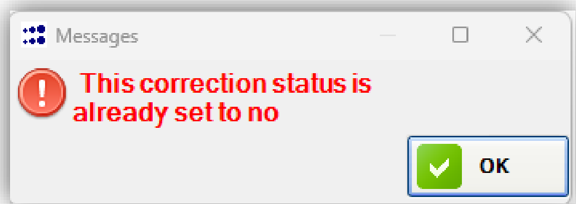


Figure 165 – Re-set File Correct Status

- The following message will appear:



- Clicking ‘Yes’ will re-set the ‘Is File Corrected” = ‘N’
- Click ‘No’ will take you back to the assessment and leave the ‘Is File Corrected” = P
- Press [F6]/[F7] to save the assessment.
- If an assessment already has a “Is File Corrected” = ‘N” then the following message will display:



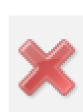
NRS - CIHI Corrected Submitted Assessment File

An assessment that has been submitted and a change is made will trigger the assessment as a correction. The correction is submitted via a CIHI Submission File - Rehabilitation (NRS) Submissions) and the record is flagged within the submission file as a correction.

NRS - CIHI Deleted Submitted Assessment

An assessment that has been submitted and is deleted, the deletion will be put into the **Purge/Recover** module is submitted via a CIHI Submission File - Rehabilitation (NRS) Submissions and the record is flagged within the submission file as a deletion.

To delete a submitted MDS (CCRS) Assessment:

- Open the record that needs deletion and Press  or [F9] and the following message will display:

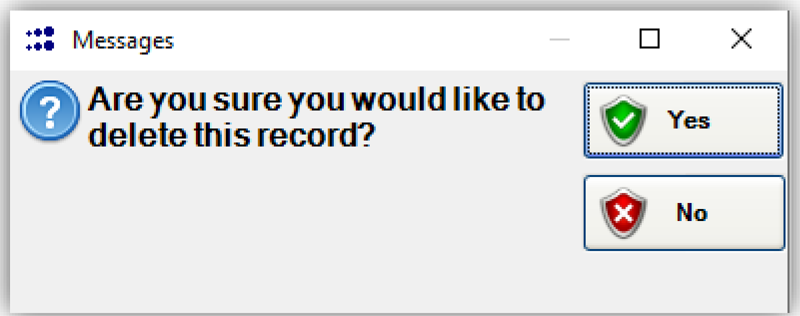


Figure 166 – Deleting an Assessment Message

Yes - will send the record to the **Purge/Recover** module

No - will not delete the record.

- The following message will appear when the record has been submitted:

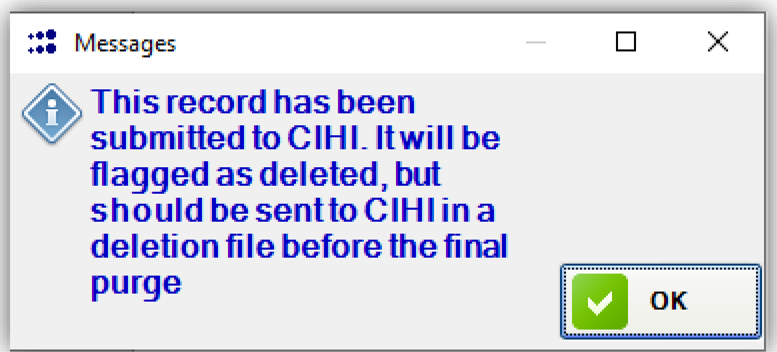


Figure 167 – Deleting an NRS Submitted Assessment Message

- Please note that submitted assessments mut be deleted in reverse order of submission (Discharge before Admission) If you try to delete a submitted assessment and the assessment following it has been submitted the following message will display:

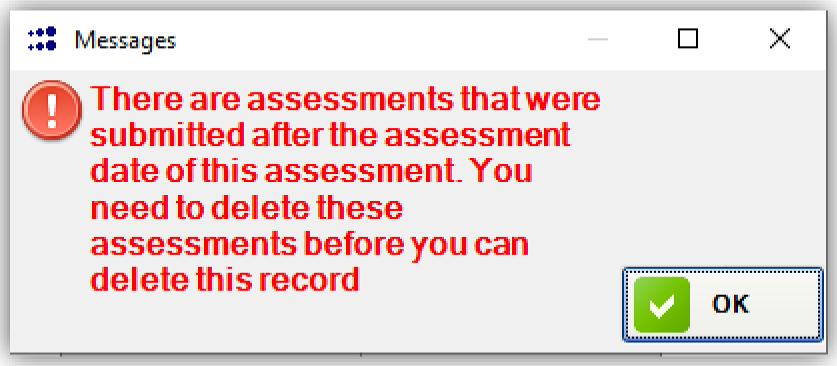


Figure 168 – Deleting an NRS Submitted Assessment Message

Once a Submission File is run, the deleted record will automatically purge from the **Purge/Recover** Module.

4.2.13 CIHI Ontario Mental Health Reporting System (OMHRS) Submissions/ Corrections/ Deletions

- Go to **Tools** → **File Management** → **MHRS** → **CIHI Insert/Update Data Submission File**

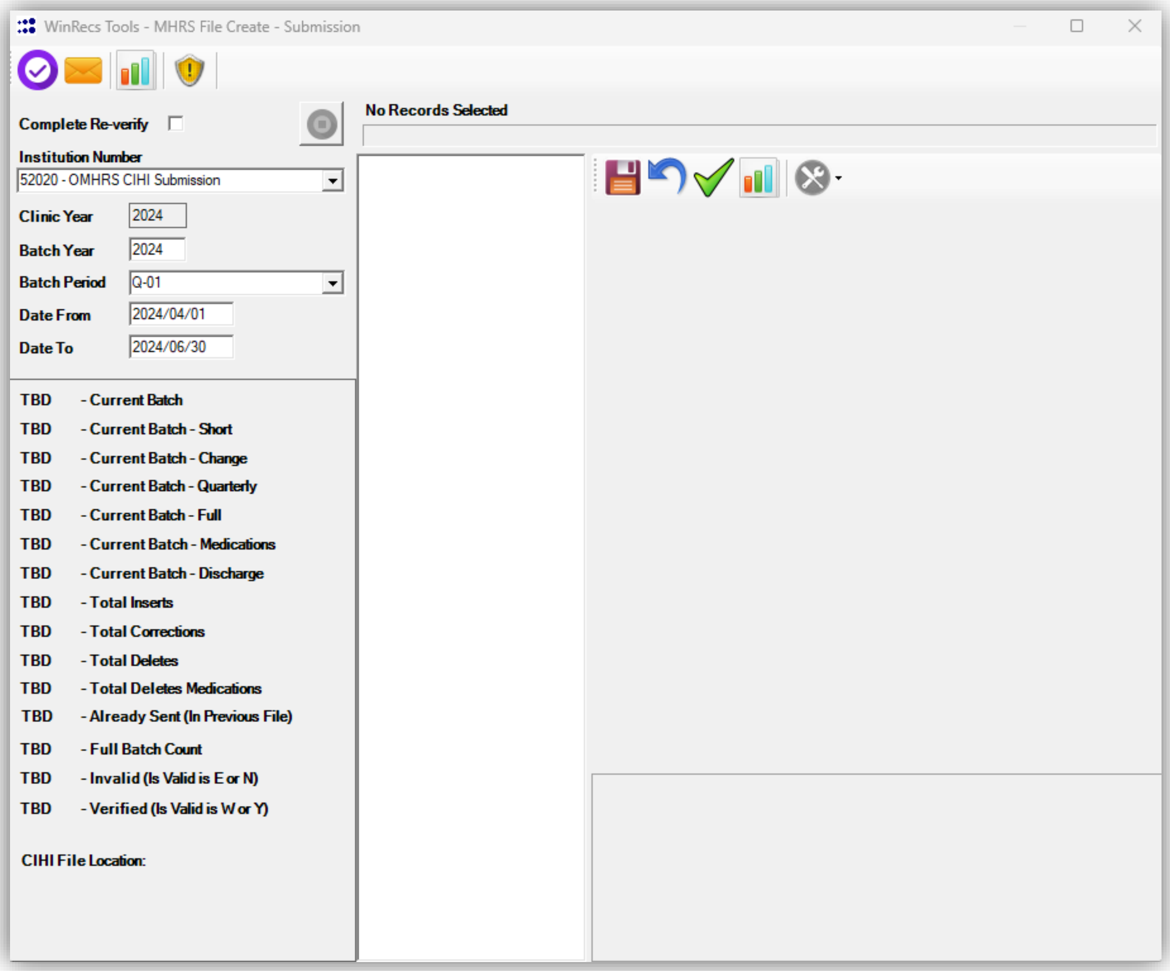
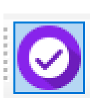
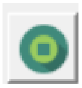


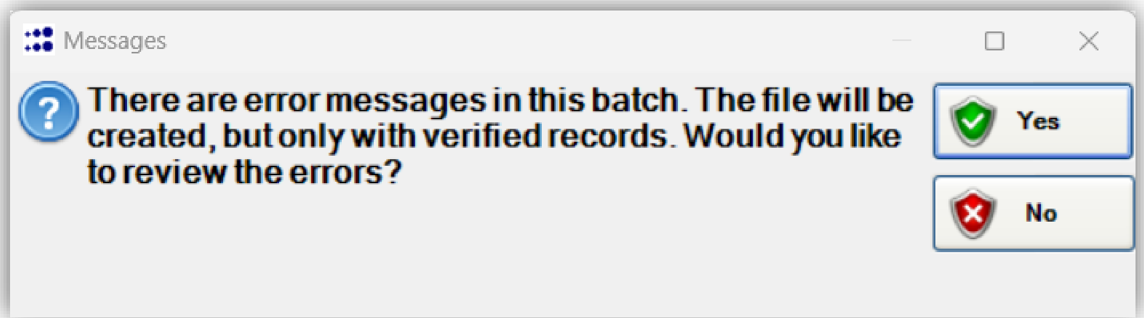
Figure 169 OMHRS Submission Screen

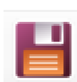
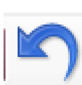
-  - `Batch Verify` (**Shift+F11**) – This will reverify all abstracts in the selected Batch
-  - `Create File` (**F12**) – This will create the file, if the Batch Verify is run just click on Create File and the file wil will be created.

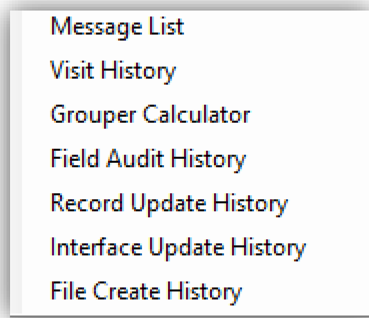
-  - `Batch Reports`(**Shift+F10**) – This will display the reports function
-  - `Checked Record Locks`– checks for locked records
-  - `Reset File Settings` – This will reset the file setting below. The following message will display when clicked:

- `Complete Re-verify` – checking this box will re-verify every record, not checking the box will not
- `Institution Number` – enter the institution number that is to be sent or click on the down arrow and choose the institution (only the institutions for the module selected will display)
- `Clinic Year` – this is the year the edits will be triggered, this field cannot be changed.
- `Batch Year` – this will be blank the first time it is used, entering the fiscal year that is being submitted
- `Batch Period` – this will default if previous quarters have been submitted/enter the quarter/or choose from the drop-down list
- `Date From` – this will default the dates of the Batch Period and can be changed
- `Date To` – this will default the dates of the Batch Period and can be changed.
- `Current Batch` – the number of assessments that are contained with in the Batch Period
- `Current Batch- Short` – the number of Short Stay assessments that are contained with in the Batch Period
- `Current Batch - Change` – the number of Change Status assessments that are contained with in the Batch Period
- `Current Batch - Quarterly` – the number of Quarterly assessments that are contained with in the Batch Period
- `Current Batch - Full` – the number of Full assessments that are contained with in the Batch Period
- `Current Batch - Medications` – the number of Medication assessments that are contained with in the Batch Period
- `Current Batch - Discharge` – the number of Discharge assessments that are contained with in the Batch Period
- `Total Inserts` – number of new assessments included in the file
- `Total Corrections` – number of assessments that are being sent as corrections
- `Total Deletes` – number of assessments that are being sent as deletions
- `Total Deletes Medications` – number of medication assessments that are being sent as deletions

- `Already Sent (In Previous File)` – number of assessments that have been previously submitted
- `Full Batch Count` – total # assessments in the CIHI file
- `Invalid (Is Valid E or N)` – This displays the number of assessments that have "N" or "E" in the is 'Is Valid' field on the abstract. During the File Create process a message will display asking the following:



  - "Yes" will display the error messages and give the ability to fix the errors
  - "No" will not display the errors and the file will be created without the errors.
- `Verified (Is Valid W or Y)` – This displays the number of asessments that have "W" or "Y" in the is 'Is Valid' field
- CIHI File Location: - displays the file location of the CIHI file.
-  - Abstract menu – used when fixing assessments with Errors and Warnings
  -  - `Save` **(F7)** – Saves the record
  -  - `Undo` – Undoes any changes to the record
  -  - `Record Verify` **(F11**) – Verifies the Record
  -  - `Report Manager`(**F10**) – Opens Select Report
  -  - `Tools`– Click on the different options to change the view at the bottom of the abstract



OMHRS – Data Processing Rules

- All record types must be submitted chronologically and in order of occurrence for each patient per episode. This avoids possible errors and rejections (ie: an admission assessment must be submitted prior to a quarterly or discharge assessment for the same patient encounter.
- The Case Record Number and Chart Number are key identifiers in linking the various assessment types during an episode of care.
- If assessments must be deleted, they must be done so in the reverse order of submission (ie: a discharge assessment deleted prior to an admission assessment.
- For subsequent admissions for the same patient, the first episode must have the discharge assessment submitted prior to a next admission assessment being submitted (ie: a patient cannot have multiple “open episodes” of care.

OMHRS – Record Validation and Submission Date

- CIHI mandates that as of their annually specified date, any assessments not already submitted that fall in the previous fiscal year, must be submitted under the new fiscal year edits/requirements. This date is communicated by CIHI to both their facility clients and the licensed vendors.
- When an assessment is being completed in WinRecs, if it belongs to the previous fiscal year’s data, and the current system date is after the Record Validation and Submission Date, the most current fiscal year edits/requirements will be applied to the assessment.
- Further, any submission file created after the Record Validation and Submission Date, regardless of the fiscal year being processed, will have the current fiscal year file specifications applied.
- This date will be updated annually by MED2020 via the annual fiscal year update, usually released around April 1.

OMHRS – Verification and Submission of Assessments

For Verification go to *Verification Only*
For Submission go to *Create Submission*

OMHRS - Reset Submission Status

When a record has been sent to CIHI and has an error, CIHI will send the record back as a rejection. These records will need to be corrected and sent in as a new submission. In order, to send it in as a new submission the records will need to be reset.

> **Please note: The CIHI Re-set File Create Status needs to be set in the User Profile/[NRS] National Rehabilitation Reporting System**

To Manually Reset the Submission Status:

- Open the rejected record
- Correct the error(s)
- Select File Settings/Re-Set File Create Status

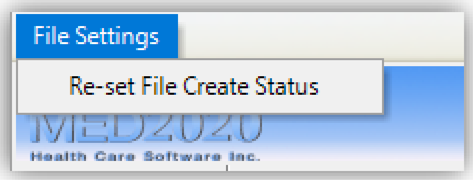


Figure 170 – Re-set File Create Status

- The following message will appear:

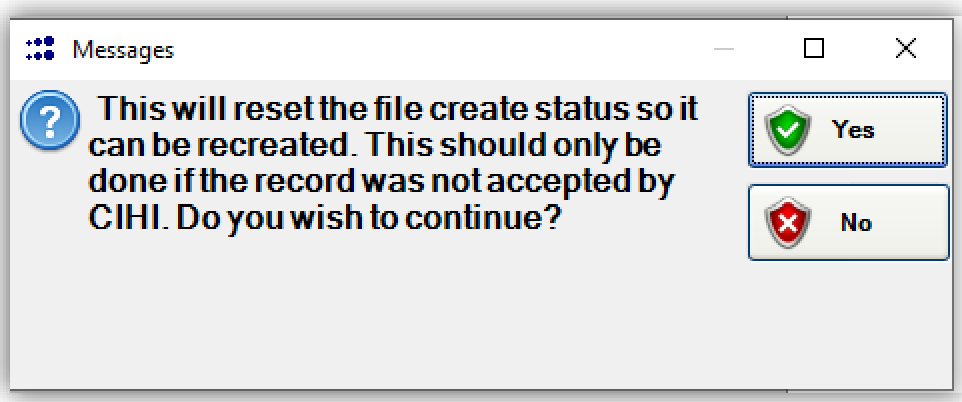


Figure 171 – Re-set File Create Status Message

- Clicking 'Yes' will reset the submission status to a 'N'
- Click 'No' will take you back to the abstract
- Press [F6]/[F7] to save the abstract.

- The 'Is Abstract Submitted' flag will now change to 'N' and the record can be resubmitted via a CIHI Submission File - OMHRS Submissions

OMHRS - Re-set Record Update Status

When an assessment is saved or created/saved, using this feature allows the user to reset the Record Update Status so the interface can still populate the abstract. This option will only be available if the assessment has NOT been submitted to CIHI.

To Manually Reset Record Update Status :

- Open the assessment
- Enter values and save the assessment
- Select Action/Re-Set Record Update Status

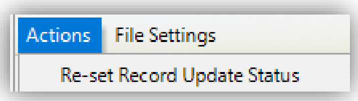
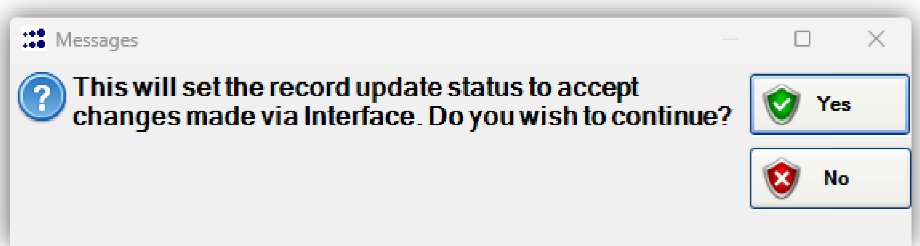
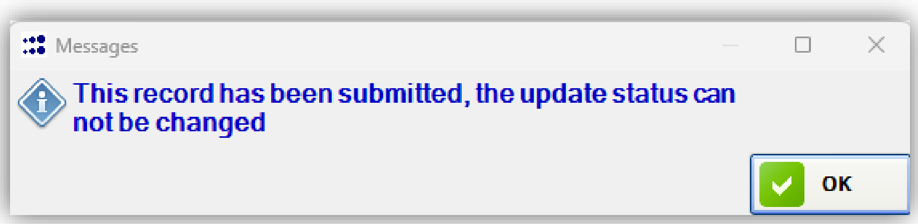


Figure 172 – Re-set Record Update Status

- The following message will appear:



- Clicking 'Yes' will re-set the record update status to a 'N'
- Click 'No' will take you back to the assessment
- Press [F6]/[F7] to save the assessment.
- If an assessment is submitted then the following message will display:



OMHRS - Re-set File Correct Status

When a submitted assessment is saved the assessment is flagged as a correction. Ising this feature allows the user to reset the ‘Is File Corrected’ flag from a “P” waiting to be set as a correction to a “N” – No correction so the corrected assessment is not sent to CIHI as a correction.

To Manually Re-set File Correct Status :

- Open the submitted assessment
- Make changes to the assessment and save the assessment
- Select Action/Re-Set File Correct Status

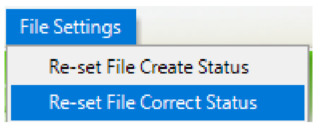
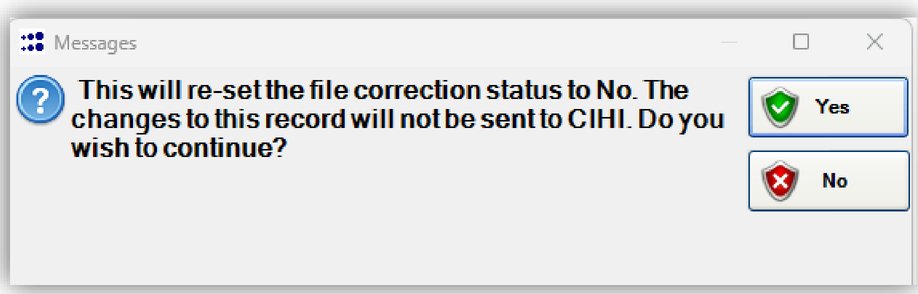


Figure 173 – Re-set File Correct Status

- The following message will appear:



- Clicking ‘Yes’ will re-set the ‘Is File Corrected” = ‘N’
- Click ‘No’ will take you back to the assessment and leave the ‘Is File Corrected” = P
- Press [F6]/[F7] to save the assessment.
- If an assessment already has a “Is File Corrected” = ‘N” then the following message will display:

OMHRS - CIHI Corrected Submitted Assessment File

An assessment that has been submitted and a change is made will trigger the assessment as a correction. The correction is submitted via a CIHI Submission File - OMHRS Submissions and the record is flagged within the submission file as a correction.

Note: If any of the elements used to identify a unique record require correction after the record has been accepted into the CIHI database, the record must be deleted and resubmitted. The applicable data elements are:

Z1: Record Type
X1: Record ID
X30: Chart Number
AA3: Case Record Number
A1: Assessment Reference Date

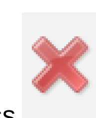
- If a Medication Record needs to be added after the assessment has already been submitted:

  Open the assessment that requires the medication record(s).
  Enter the medication record(s).
  Exit the Medication Records multiform and save the assessment.
- A submission file for the fiscal quarter applicable to the assessment the medication record(s) were recorded in will then need to be created if the medication records are to be submitted to CIHI. A correction record type will process for "parent" assessment and a new record type specific to the medication information will be included in the file.

OMHRS - CIHI Deleted Submitted Assessment

An assessment that has been submitted and is deleted, the deletion will be put into the **Purge/Recover** module is submitted via a CIHI Submission File - OMHRS Submissions and the record is flagged within the submission file as a deletion.

To delete a submitted MDS (CCRS) Assessment:

- Open the record that needs deletion and Press  or [F9] and the following message will display:

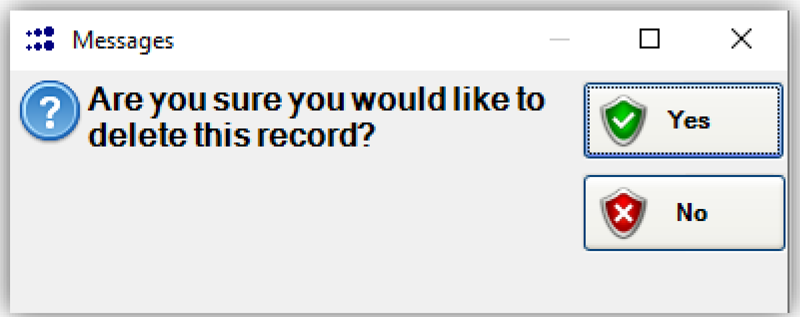


Figure 174 – Deleting an Assessment Message

Yes - will send the record to the **Purge/Recover** module

No - will not delete the record.

- The following message will appear when the record has been submitted:

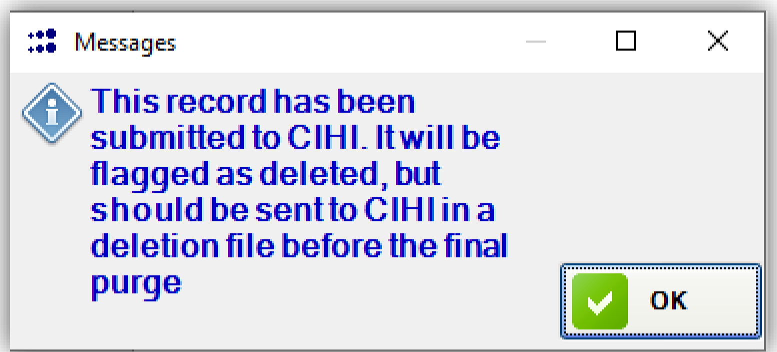


Figure 175 – Deleting an OMHRS Submitted Assessment Message

- Please note that submitted assessments mut be deleted in reverse order of submission (Discharge before Quarterly, Quarterly before Admission etc.) If you try to delete a submitted assessment and the assessment following it has been submitted the following message will display:

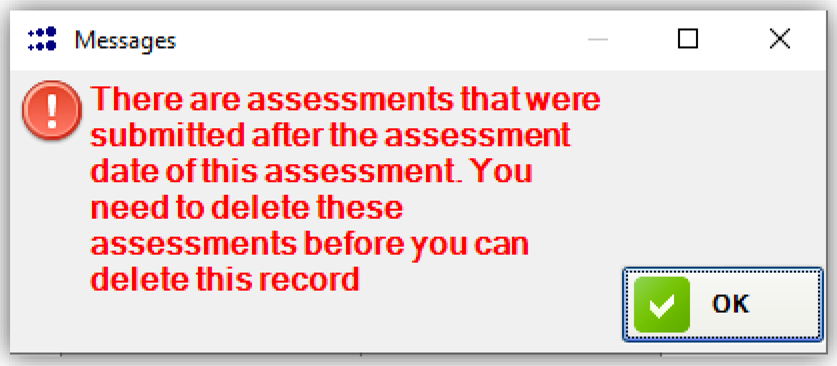


Figure 176 – Deleting an OMHRS Submitted Assessment Message

Once a Submission File is run, the deleted record will automatically purge from the **Purge/Recover** Module.

- Medication Records: Medication records that have been submitted along with the assessment and then the required deletion can be processed as follows:

  Open the assessment that contains the erroneous medication record.
  Select the medication occurrence that requires deletion.
  Click **Delete**.
  - or – Press **F9**.
  Exit the Medication Records multiform and save the assessment.
  Repeat this function until the appropriate assessments have been deleted.
  A submission file for the fiscal quarter applicable to the deleted medication record(s) will then need to be created if the deletions are to be submitted to CIHI. The specific Medication Records deleted will be flagged appropriately in the submission file. See Create a CIHI Submission File for details.

4.2.14 Summary Table of Submission Functions

Function	DAD	NACRS	NRS	OMHRS	MDS 2.0	CJRR
Facility Information File	Create electronically in WinRecs	Create electronically in WinRecs	Create electronically in WinRecs	Create electronically in WinRecs	Create electronically in WinRecs	Uses DAD/ NACRS institution number
New Records	Submit using CIHI Submission module – submit by batch period.	Submit using CIHI Submission module submit by batch period	CIHI Submission module – submit by quarter	Submit using CIHI Submission module submit by quarter *IAR- Set "Is this a IAR Submission File to "Y"*	Submit using CIHI Submission module submit by quarter	Submit using CIHI Submission module submit by batch period.
Records with errors	Accepted to the CIHI database, DAD error file sent to client	Rejected by CIHI, NACRS Rejection file sent to client	Rejected by CIHI, rejected records report sent to client	Rejected by CIHI, OMHRS Rejection file sent to client *IAR- CCIM notifies rejected records*	Rejected by CIHI, rejected records report sent to client	Rejected by CIHI, rejected records report sent to client
Error file	Can be imported to WinRecs via Modules/Utilities/Import DAD CIHI Errors option	Can be imported via the Incoming Batch Interface module, select the NACRS Error Import structure file	No electronic error file provided	Can be imported to WinRecs via Modules/Utilities/Import OMHRS CIHI Errors option *IAR- N/A*	No electronic error file provided	No electronic error file provided
Corrections	Update records with correct information and save – record flags as 'pending' for inclusion in next Corrections file.	-Rejected records are corrected and saved in WinRecs. If NACRS rejection file is not imported, use the "Reset Submission Status" function for each corrected abstract. -Importing the NACRS rejection file re-sets submit status to "not submitted" -Process 'corrected' records initially rejected, as a regular submission (CIHI Submission module) -Submitted and accepted records in NACRS can be	Rejected records are corrected and saved in WinRecs. Use 'Reset Submission Status' function for each rejected abstract. Submitted and accepted records in NRS can be corrected. Open, edit and save the record. Process CIHI Submission file for the applicable quarter.	Rejected records are corrected and saved in WinRecs. If OMHRS rejection file is not imported, use the "Reset Submission Status" function for each corrected abstract. -Importing the OMHRS rejection file re-sets submit status to "not submitted" -Process 'corrected' records initially rejected, as a regular submission (CIHI Submission module) -Submitted and accepted records in OMHRS can be corrected. Open, edit and save record. -Process CIHI Submission file. *-IAR Corrections and deletions processed the same way.*	Rejected records are corrected and saved in WinRecs. Use 'Reset Submission Status' function for each rejected abstract. Submitted and accepted records in MDS 2.0 are updated using specific Change/Correction assessment types.	Rejected records are corrected and saved in WinRecs and re-sent as an insert. Use the "Reset Submission Status" function for each corrected abstract. Submitted and accepted records can be corrected. Open, edit and save record and it will be sent as an update. Both inserts

		corrected. Open, edit and save record. -Process CIHI Correction file for the applicable period.		*Rejected records must be reset manually.*		and updates are sent through the submission module.
Deletions	When submitted abstract is deleted, it is flagged in the Purge/Undelete area and will be included in a deletion file next time the CIHI Corrections are processed.	When submitted, accepted, record is deleted, it is flagged in the Purge/Undelete module and will be processed using the CIHI Correction module.	Submitted, accepted, record is deleted, it is flagged in the Purge/Undelete module and will be processed using the CIHI Submission module.	When submitted, accepted, record is deleted, it is flagged in the Purge/Undelete module and will be processed using the CIHI Submission module. Same Process for IAR	Deleted assessments that have been submitted to CIHI are flagged in the Purge/Undelete module and will be picked up as a record type deletion when a submission file for that quarter is created.	Email CIHI Liason and include Record ID, Surgeon ID, Patient's Name, Joint Type, Date of Surgery and Procedure for deletion.

4.3 Batch Grouper

The Batch Grouper ensures that the correct grouper values are assigned to the visit. The Batch Grouper should be run prior to creating Submission Files.

Using the Batch Grouper

Tools → Batch Grouper

Choose the module you would like to regroup:

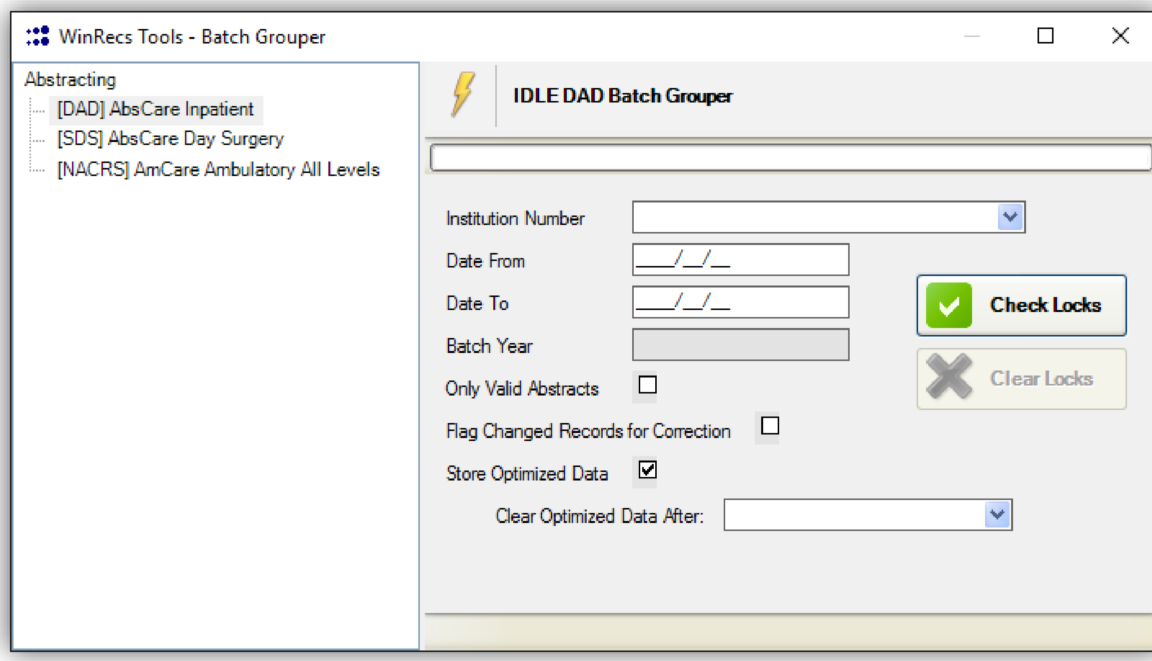


Figure 177 – Batch Grouper

- Institution Number – Enter the number or click on the drop-down arrow
- Date From – The start date of the batch
- Date To – The end date of the batch
- Batch Year – This will default depending on the dates chosen above.
- Only Valid Abstracts – if checked it will only Batch Group valid records where the 'Is Validated' in the abstract is 'Yes', if not checked Batch Group all records.
- Flag Changed Records for Correction - This is an optional function when checked any records that have been submitted will be flagged for Correction (sent as a correction file). Only records found to have changed grouper data would be flagged.
- Store Optimized Data - Defines if the Batch Grouper will store grouper data for other diagnoses. See below section on Store Optimizing Data.

- Clear Optimized Data After - If Store Optimizing Data is selected, optimizing data will automatically be purged after the specified period. Select the dropdown menu to see a list of the available options. See below section on Store Optimizing Data.

- Check Locks – checks for locked records
- Clear Locks – clears locked records
- Press the  to start the process
- The green bar will move while processing the records
- Once the prosses is complete the following will display.

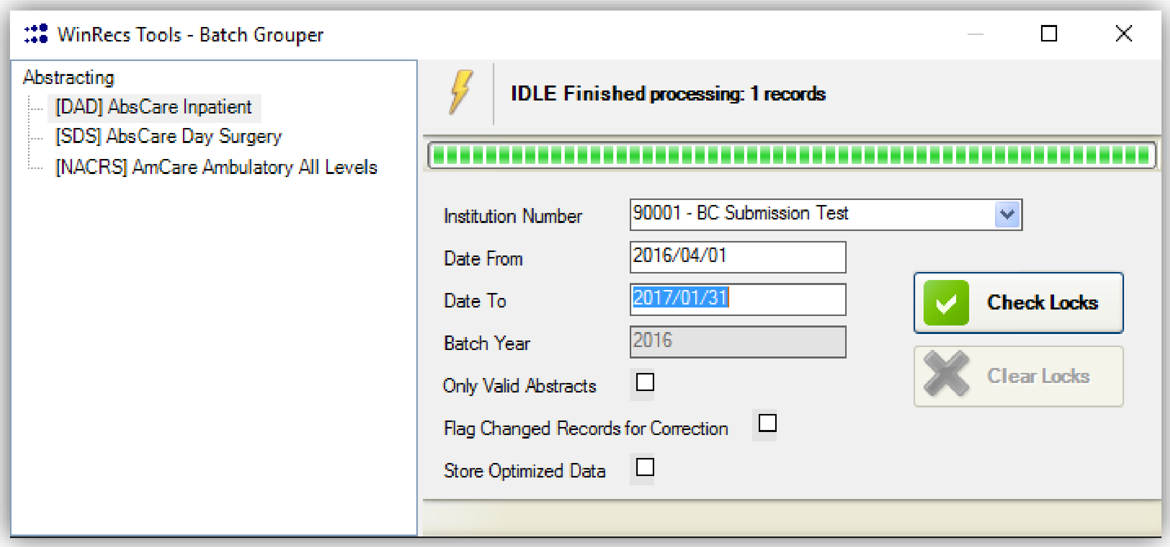


Figure 178 – Batch Grouper – Finished Processing

- The process is now complete.

4.4 Batch Interface

A Batch Interface is used to import text files that contain specifically formatted patient data, into WinRecs. This data is produced by an external patient records system, such as an ADT system. The Interface allows HIMs to bring across patient record data to WinRecs without the need for data re-entry.

Note: Batch Interfaces are custom built. If you have any questions regarding this process, contact a MED2020 Client Services Representative. Contact information is available above in the section 'Contact MED2020'.

Importing with Batch Interface

Note: Installation/ Updates files and instructions must be supplied by MED2020. Instructions are not provided in this guide as they vary from customer to customer. Do not proceed with the following instructions until you have contacted a Client Services representative for assistance.

The following steps require access to WinRecs and can be performed by a Health Information Management professional in your facility. If a member of IT Services will be performing these steps a login to WinRecs will be required.

The following screen opens when you select **Tools → Batch Interface**

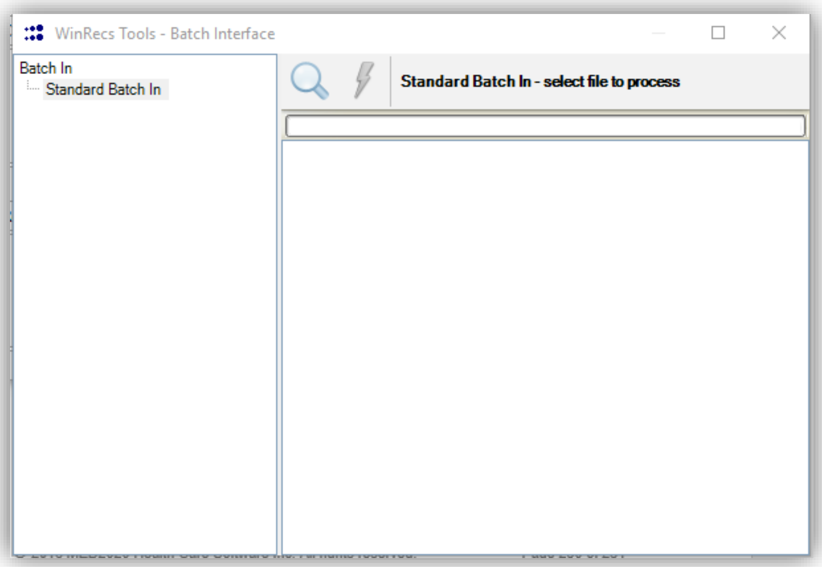


Figure 179 - Batch Interface window

- Click the Search button  in the window.

— or —

- Press **[F4].**
- Search for the Batch Interface text file on your computer network. Select the filename and click Open.

Note: Contact your WinRecs administrator to learn where the import files are located in your particular environment.

- The name of the file being imported is shown on the Batch Interface window.
- Click the Execute button in the window.

— or —

- Press **[F11].**
- A processing bar will show as the records are imported.
- Error messages will be displayed on the same screen if there is any.
- Once the import is finished, close the window by clicking the icon . The records are now in the **CPI MODULE** and appropriate modules.

4.5 Purge/Recover

This module is to completely recover or purge deleted abstracts or CPI MODULE entries.

To access Purge/Recover

Tools →Purge/Recover

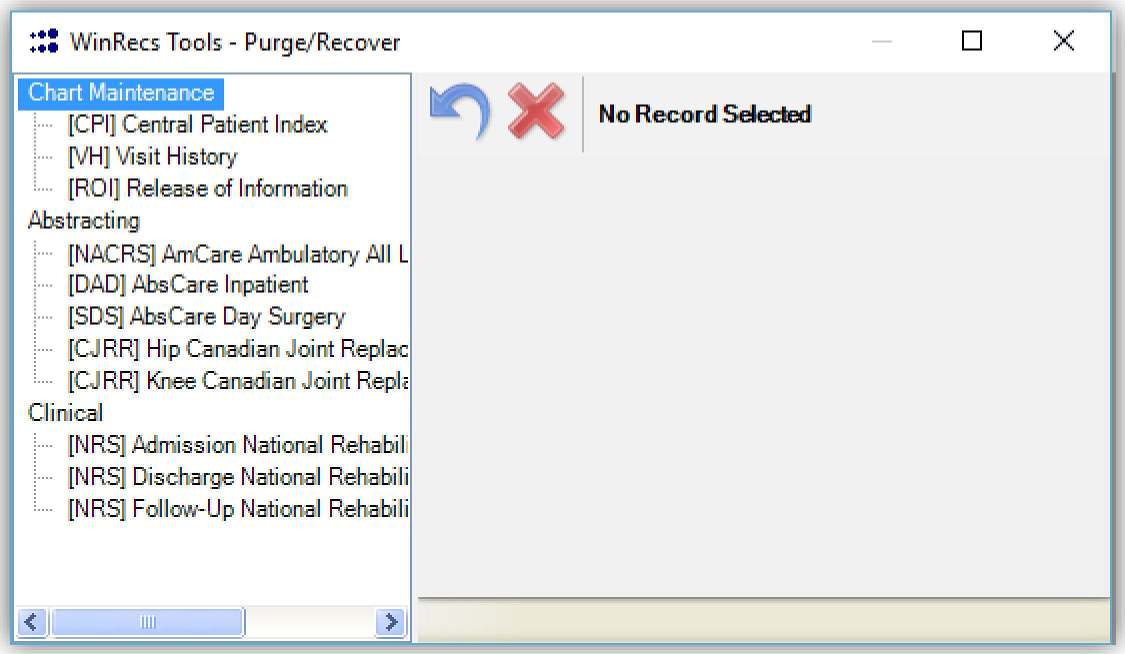


Figure 180 – Purge/Recover Screen

If a deleted record has been sent to CIHI, a Deletion File must be created first. See CIHI Deletion File. Once the file has been created the deleted abstract will purge from Purge/Recover file. Abstracts should also be purged for a period before running CIHI Submissions, CIHI Corrections or reports.

To Purge an Abstract

- Click on the module the abstract was deleted from.
- A list of all the deleted records will display
- Put a checkmark beside the record that needs to be purged
- Click on any column header to sort by that column.

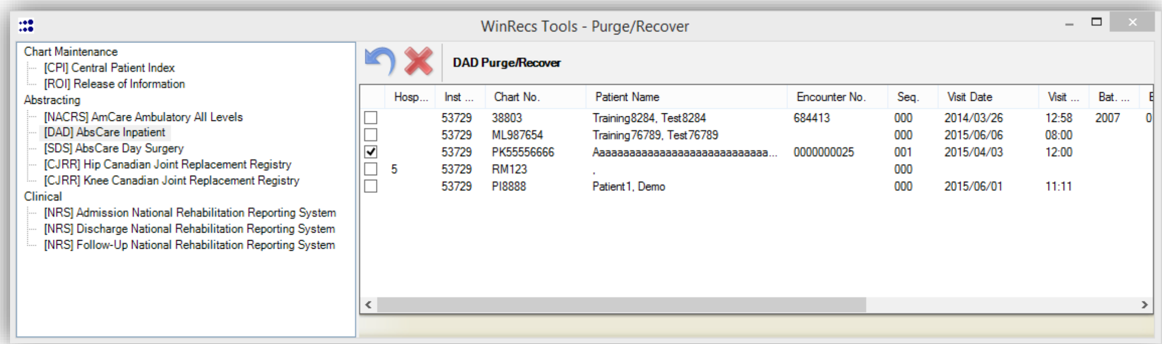


Figure 181 – Purging a Record

- Click on the  or **[F9]** to purge the abstract. This will remove it from all reports and the database.
- The following message will display:

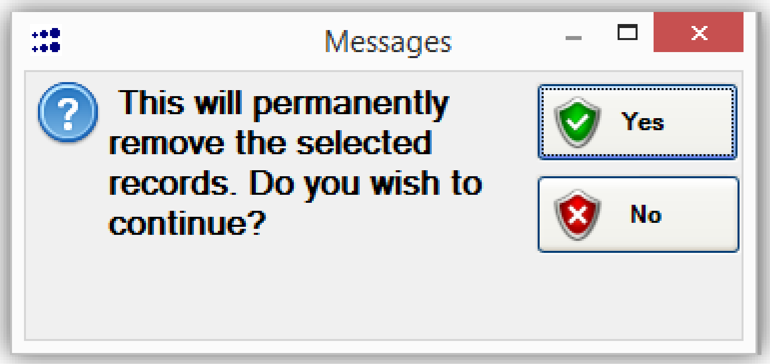


Figure 182 – Purge Message Prompt

Clicking **'YES'** will purge the record

Clicking **'NO'** will go back to the Purge/Recover Screen.

- **If a record that is being purged has been submitted to CIHI, the following message will appear:**

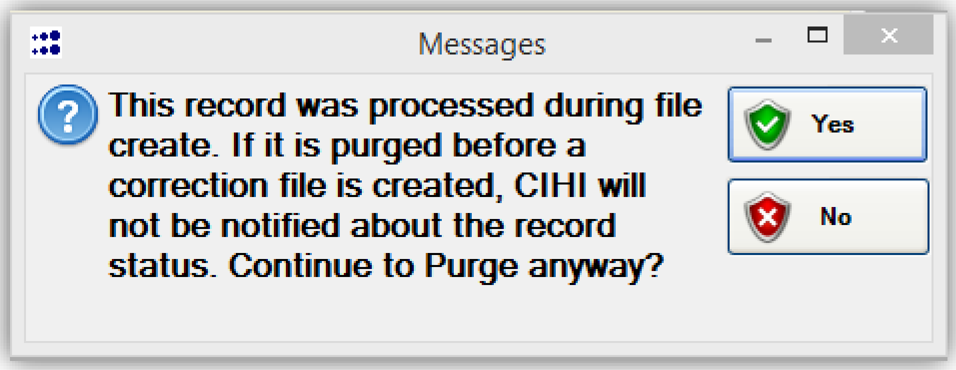
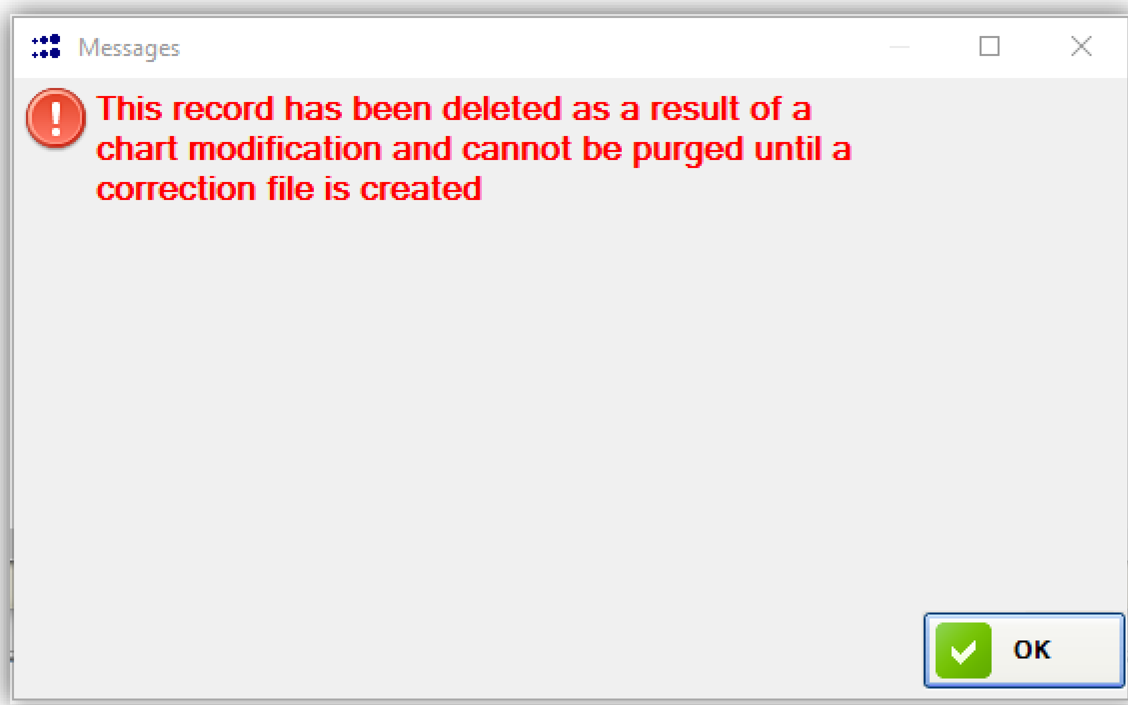


Figure 183 – Purging Abstract Already Submitted to CIHI

- Clicking **'YES'** will purge the record and the record will not be sent to CIHI as a deletion.
- Clicking **'NO'** will go back to the Purge/Recover Screen and send the record to CIHI via, the CIHI Deletion File.
- If a record has been merged and has been flagged as a sending the record as a deletion to CIHI, the following message will appear



To Recover an Abstract

- Click on the module the abstract was deleted from.
- A list of all the deleted records will display
- Put a checkmark beside the record that needs to be recovered:

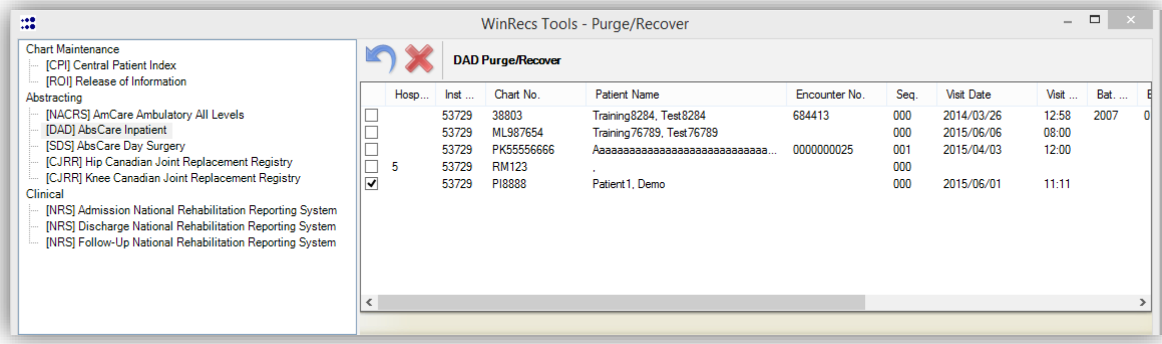


Figure 184 – Recovering an Abstract after Deletion

- Click on the [icon] or **[F8] – Recover** to recover the record.
- The following message will display:

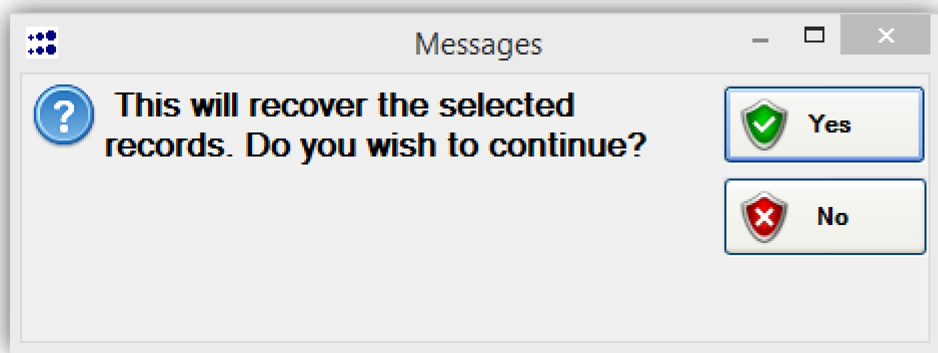


Figure 185 – Recover Abstract Prompt

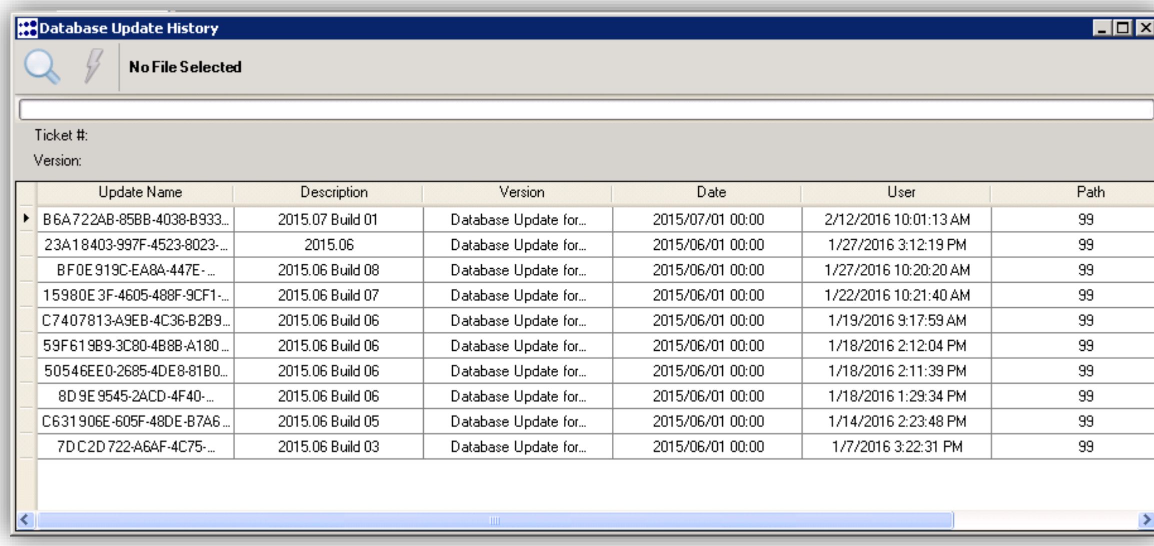
- Clicking **'YES'** will recover the record
- Clicking **'NO'** will go back to the Purge/Recover Screen.

4.6 Database Update History

This gives the user to run patches in WinRecs.

- Download the patch to a directory (as per site policy)
- If the file has .zip, unzip it in the directory you have downloaded to
- Log in WinRecs

- **Tools →Database Update History**



	Update Name	Description	Version	Date	User	Path
▸	B6A722AB-85BB-4038-B933...	2015.07 Build 01	Database Update for...	2015/07/01 00:00	2/12/2016 10:01:13 AM	99
	23A18403-997F-4523-8023-...	2015.06	Database Update for...	2015/06/01 00:00	1/27/2016 3:12:19 PM	99
	BF0E919C-EA8A-447E-...	2015.06 Build 08	Database Update for...	2015/06/01 00:00	1/27/2016 10:20:20 AM	99
	15980E3F-4605-488F-9CF1-...	2015.06 Build 07	Database Update for...	2015/06/01 00:00	1/22/2016 10:21:40 AM	99
	C7407813-A9EB-4C36-B2B9...	2015.06 Build 06	Database Update for...	2015/06/01 00:00	1/19/2016 9:17:59 AM	99
	59F619B9-3C80-4B8B-A180...	2015.06 Build 06	Database Update for...	2015/06/01 00:00	1/18/2016 2:12:04 PM	99
	50546EE0-2685-4DE8-81B0...	2015.06 Build 06	Database Update for...	2015/06/01 00:00	1/18/2016 2:11:39 PM	99
	8D9E9545-2ACD-4F40-...	2015.06 Build 06	Database Update for...	2015/06/01 00:00	1/18/2016 1:29:34 PM	99
	C631906E-605F-48DE-B7A6...	2015.06 Build 05	Database Update for...	2015/06/01 00:00	1/14/2016 2:23:48 PM	99
	7DC2D722-A6AF-4C75-...	2015.06 Build 03	Database Update for...	2015/06/01 00:00	1/7/2016 3:22:31 PM	99

Figure 186 – Database Update History

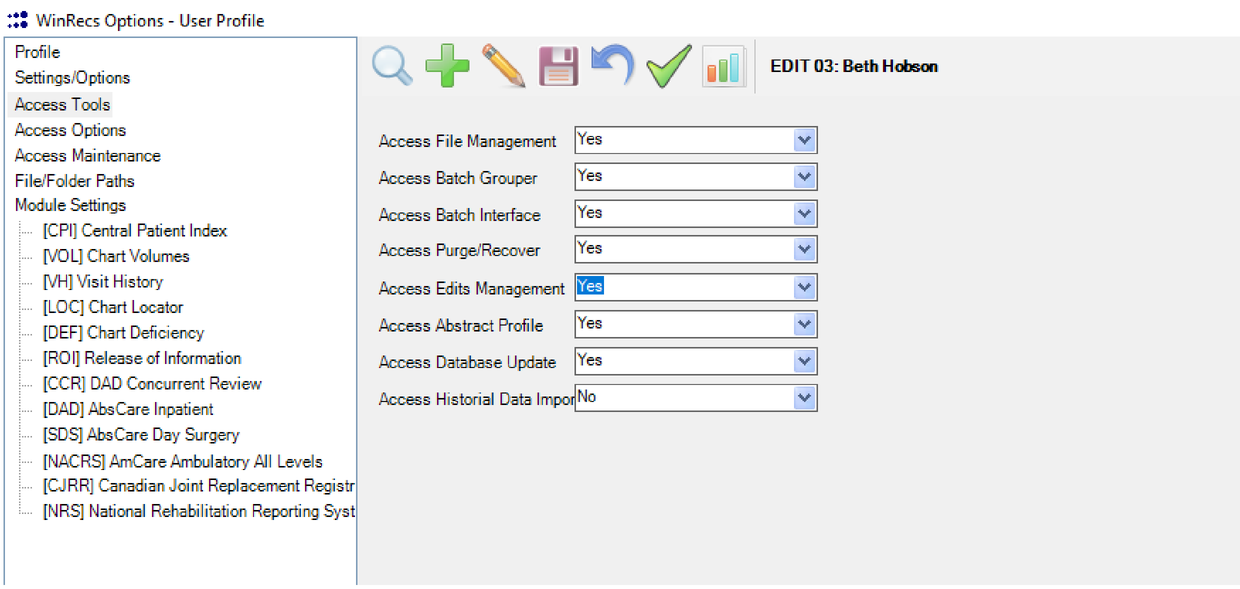
- Press the  and look for the patch in the file directory it was saved in.
- Press the  to process the file.
- The green bar will run and tell you when completed
- For the patch changes to be seen, users must log out and back in.

4.7 Edits Management Tool (EMT)

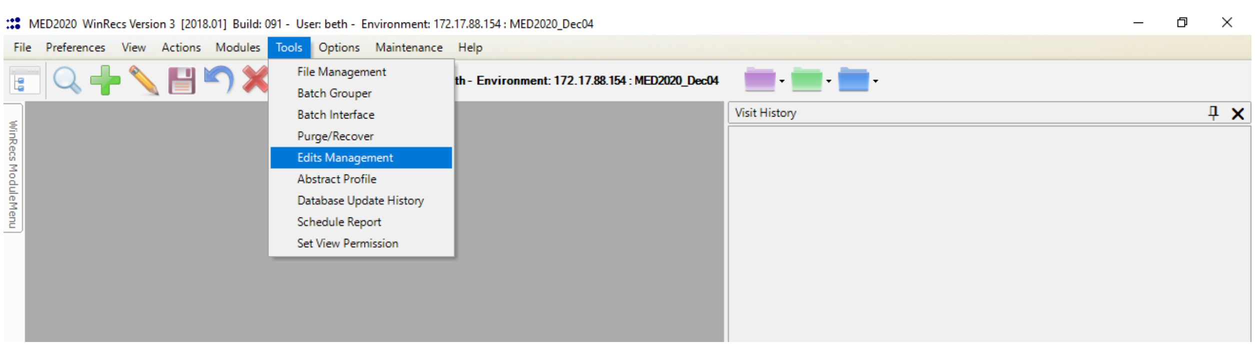
User Profile

There is a field in User Profile that needs to be modified.

Access Edits Management-Yes



Tools>Edit Management



EMT Editor window will display

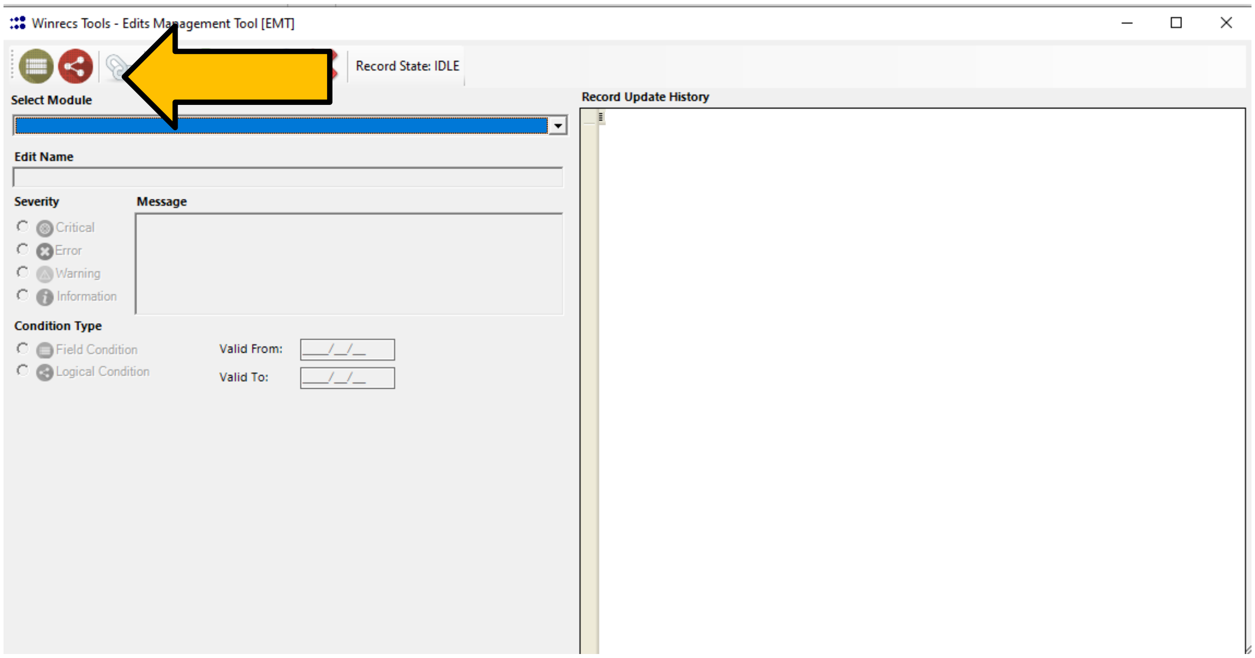
What is an Operator?

An operator are special symbols or words that describe an operator or an action to take place between two or more values.

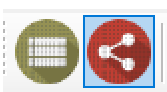
Operators
Any Value/Blank (no value)
Equal To/Not Equal
Like/Not Like
Start With/Not Starts With
Less/Less or Equal
Greater /Greater or Equal
And/Or

What is a Condition?
Sometimes referred to as a conditional expression and conditional processing, a conditional statement is a set of rules performed if a certain condition is met.
Field Condition- A Field Condition is a when a field refers to value(s) or a field that refers to another field.
Logical Condition- Logical Condition is a combination of field conditions or field conditions and other Logical Conditions. A statement that combines the results of two component conditions to produce a single result.

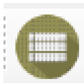
Condition Editors



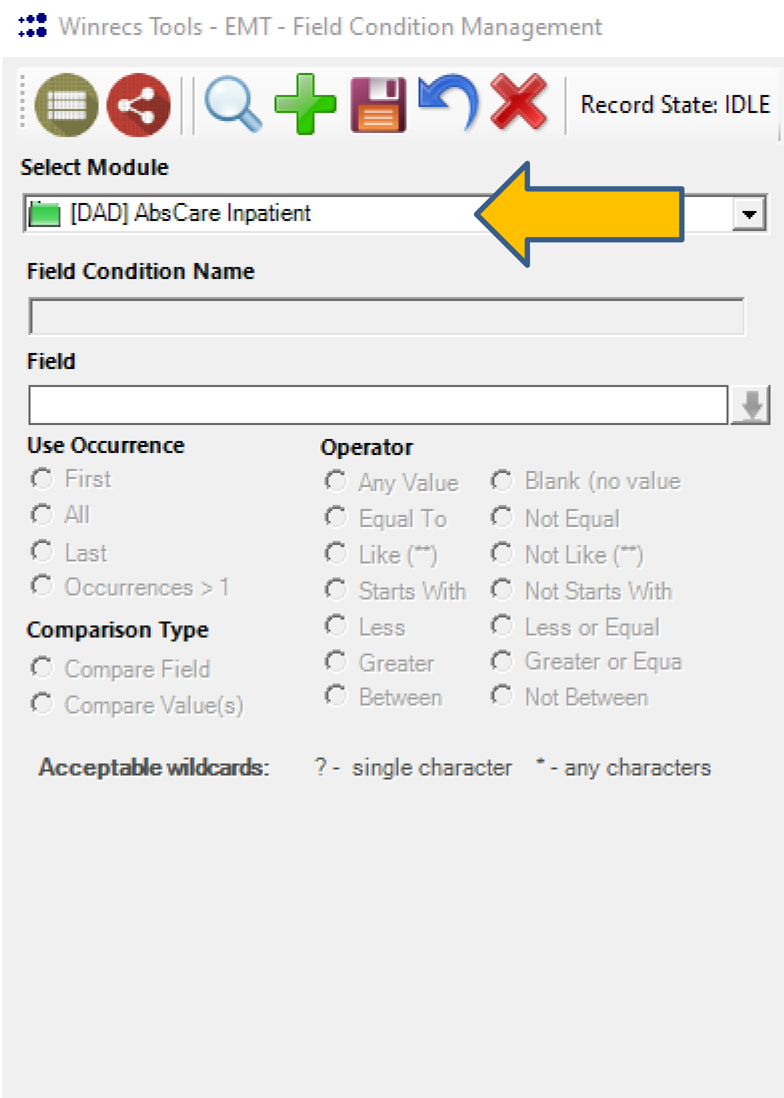
Two icons in tool bar



Field Condition Editor



Select Module in drop down



New Condition

Field Condition Name

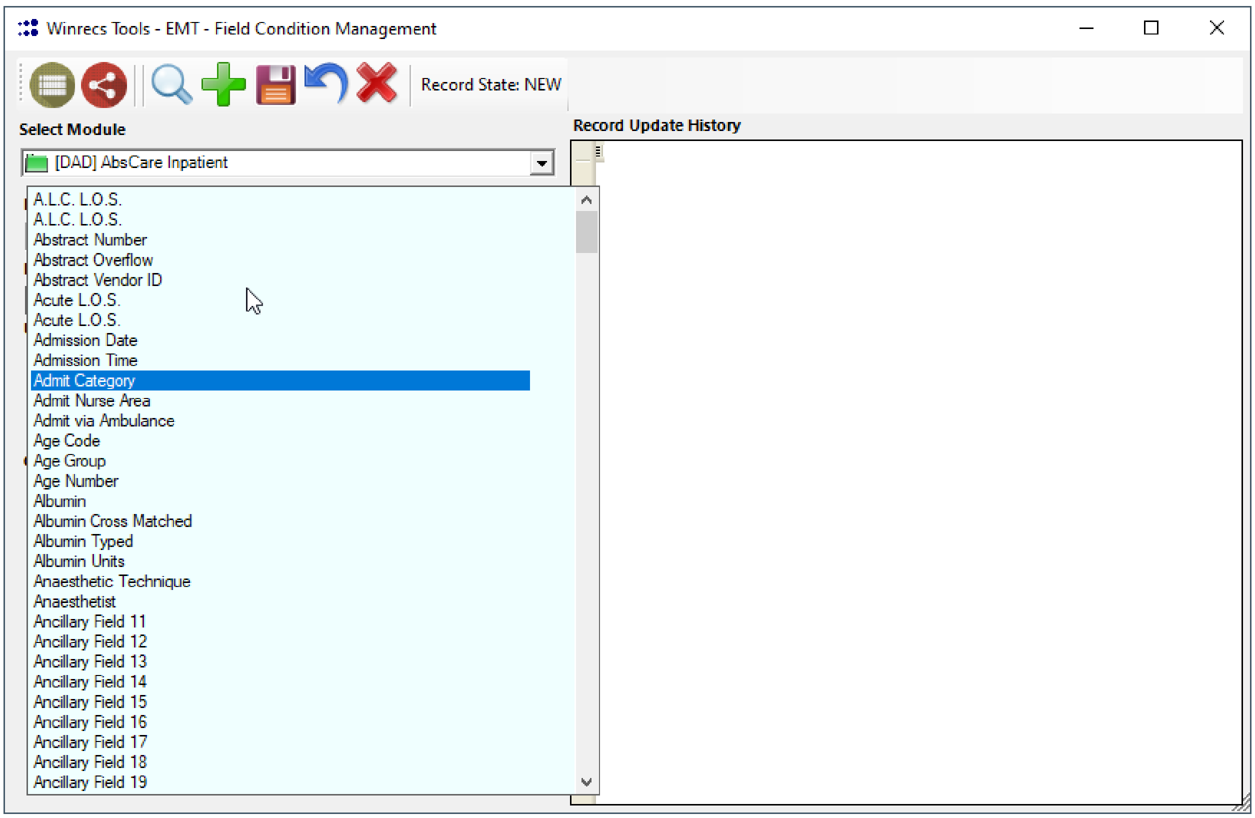
Name the Field Condition you are creating.

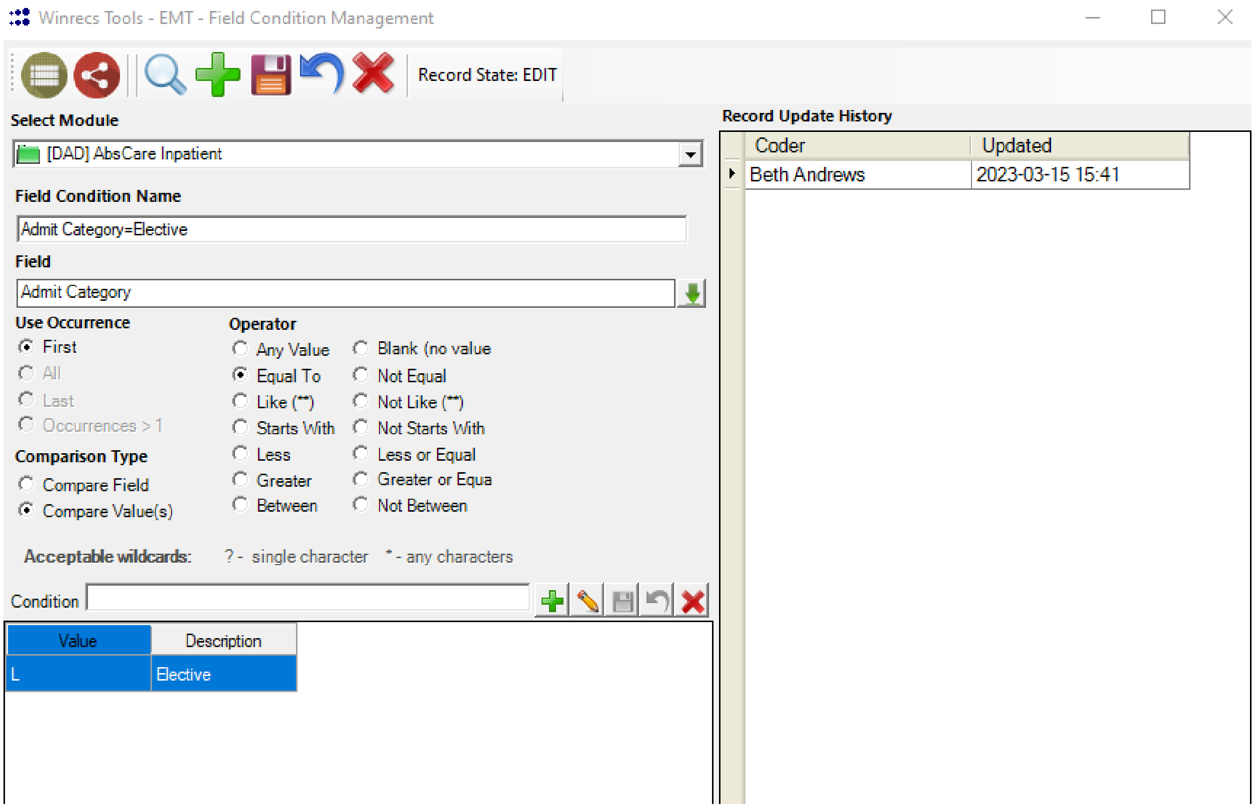
Suggestion: For your Field Conditions, establish a naming convention . If the field condition is referring to Diagnosis, name the Field Condition Diag, Dx, Intervention, Intv l The list of conditions will sort in alphabetical order based on the name.

Fields

Use the green arrow  to display the module fields available.

Type field name to select from list





Use occurrence

First

- For fields in main grid, first occurrence will always be selected
- In a multiform this first occurrence refers to the MAIN occurrence

All

- In a multiform this refers to all occurrences from fist occurrence and greater

Last

- In a multiform this refers to the last/maximum occurrence number

Occurrences (>1)

- In a multiform this refers to other occurrences in a multi form EXCEPT firs occurrence

Field condition operators

- *Any Value/Blank (no value)*- When selecting a field, this operator refers to a value or no value.

- *Equal To/Not Equal*- When selecting a field, this operator refers to an EXACT value or NOT EXACT value. The value in condition can be more than one value.
  Example:

Admit Category = L
Admit Category = L, E, N

- *Like/Not Like*- When selecting a field, this operator refers to a field that contains the value or not like the value.

- *Start With/Not Starts With*- When selecting a field, this operator refers to a field that begins not not begins with this value.
  Example:
  Diagnosis Code starts with K29

- *Less/Less or Equal*- When selecting a field, this operator refers to a NUMBER data type field.
  Example:
  LOS Days <20, LOS <=20

- *Greater /Greater or Equal*- When selecting a field, this operator refers to a NUMBER data type field
  Example:
  LOS Days >20, LOS>=20

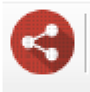
- *Between/Not Between* - When selecting a field, this operator refers to a NUMBER data type or a STRING data type field
  Example:
  LOS Days is Between 10 to 25
  Diagnosis Code is Between I60 to I68.9

Comparison type

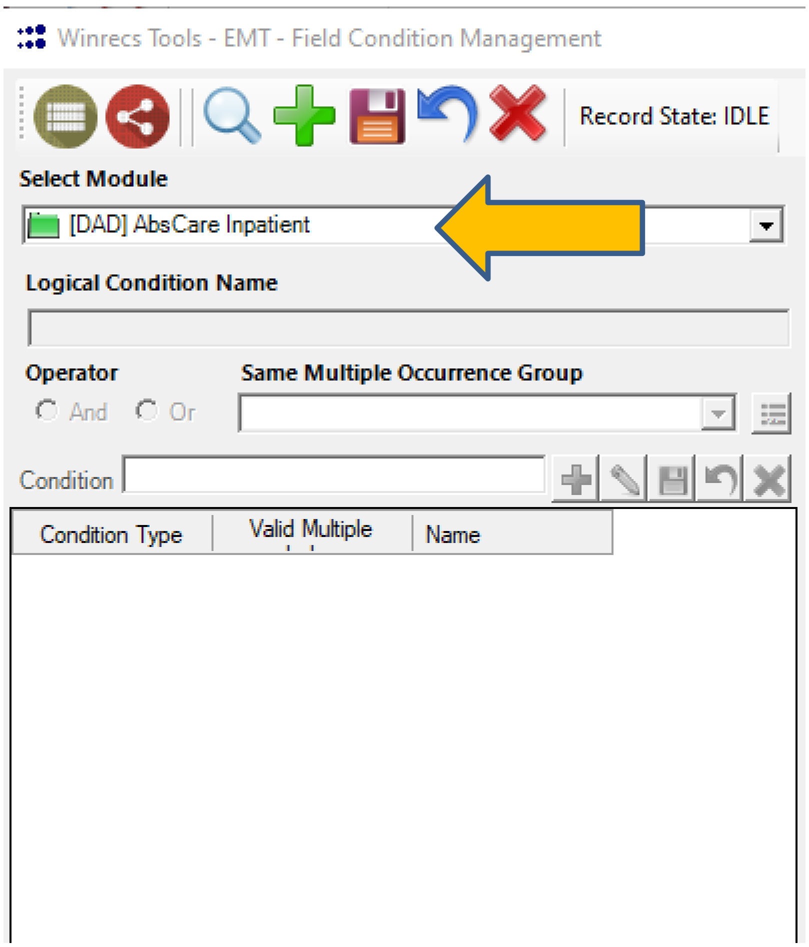
- *Compare Field*- A specific field and it's value compared to another specific field and it's value. Example:
  Admission Date = Discharge Date
  Triage Date > Registration Date

- *Compare Values(s)*- A specific field that refers to values
  Example:
  Admit Category = L
  Diagnosis Code like K29
  Patient Service =10

Logical Condition Editor



Select the module



New Condition

Logical Condition Name

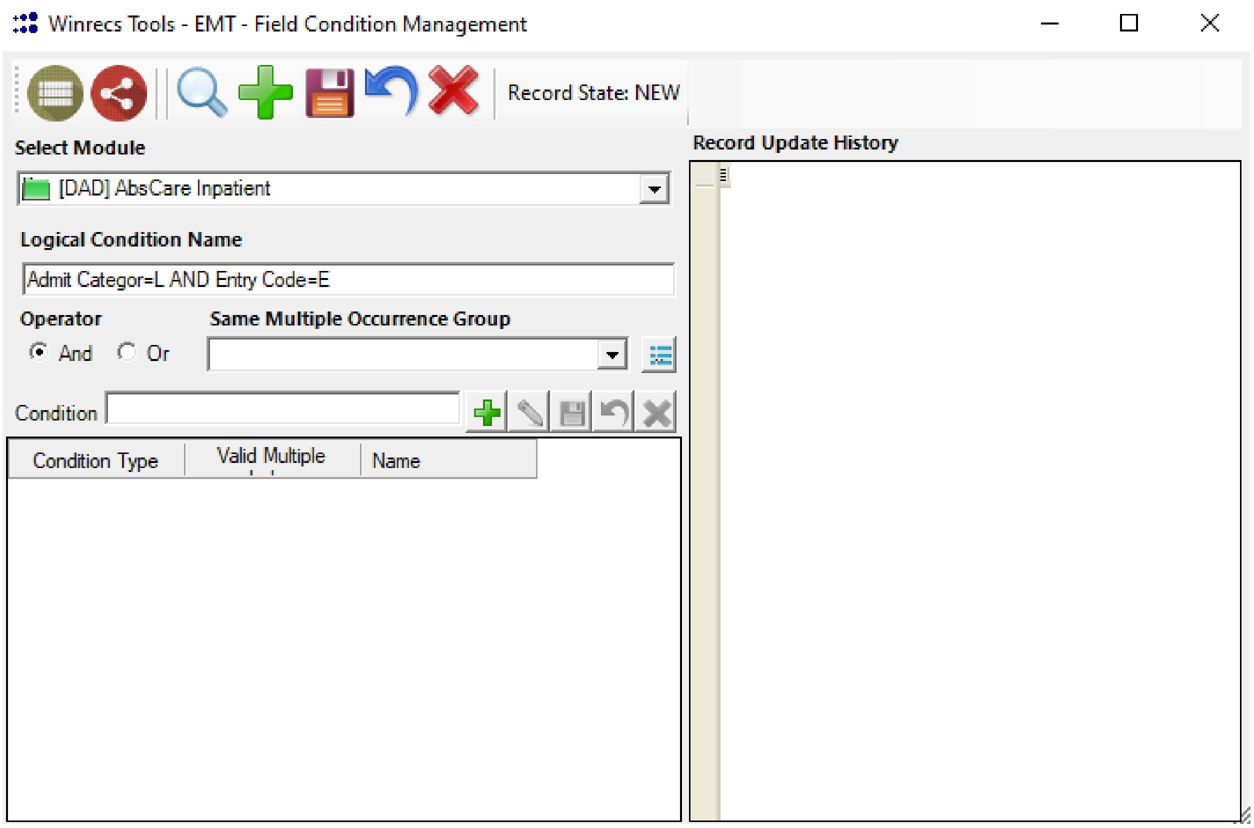
- Name the Logical Condition you are creating.

Logical condition operators

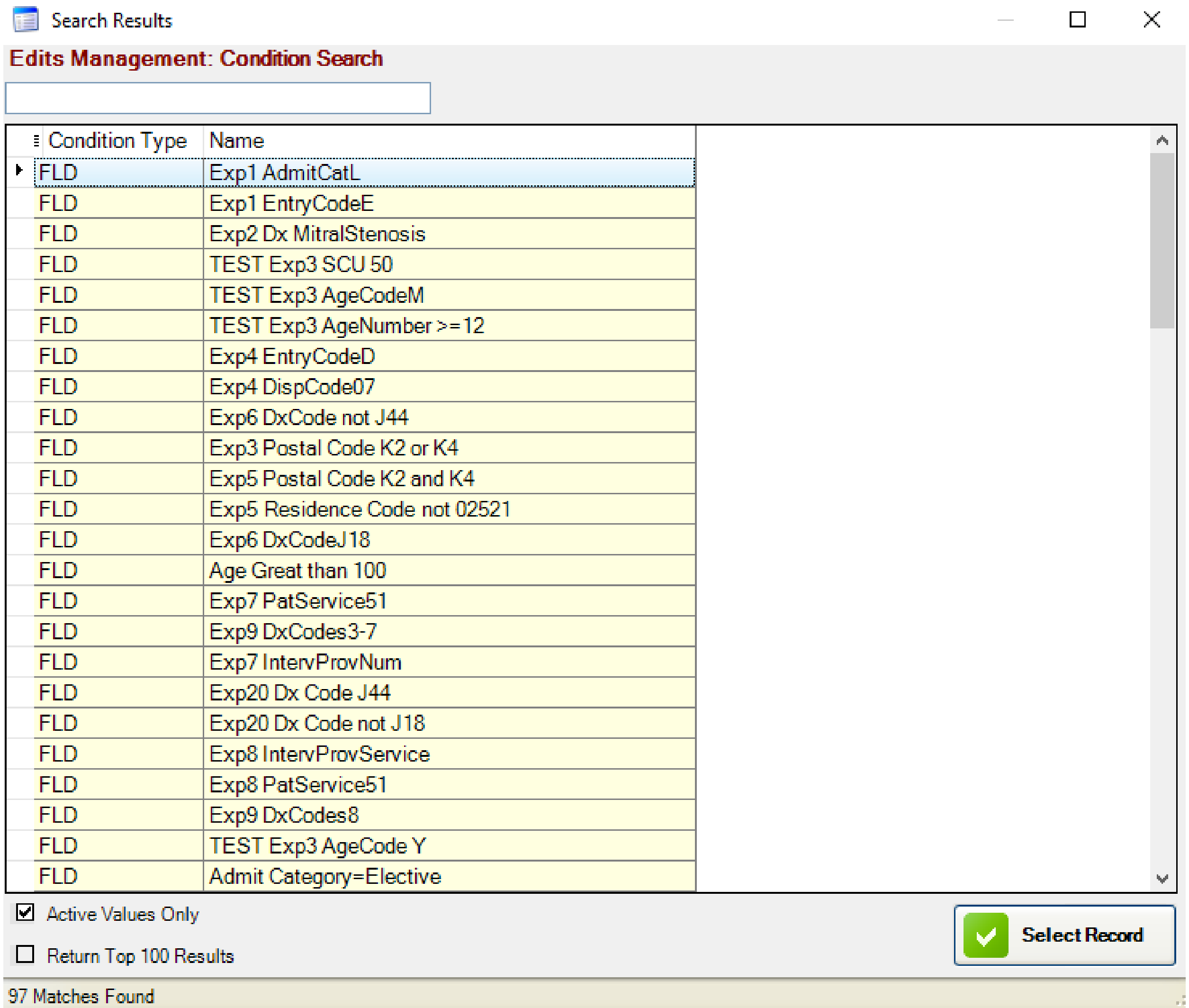
FIELD condition **AND** FIELD condition
LOGICAL condition **AND** FIELD condition

LOGICAL condition **And** FIELD condition **OR** FIELD condition
LOGICAL condition **AND** LOGICAL condition
LOGICAL condition **OR** LOGICAL condition

- *And/Or*- used to connect field conditions or to connect field conditions with Logical Conditions.



- Click the  to select the Conditions
- Click F2 to see a list of Conditions



Search Results

Edits Management: Condition Search

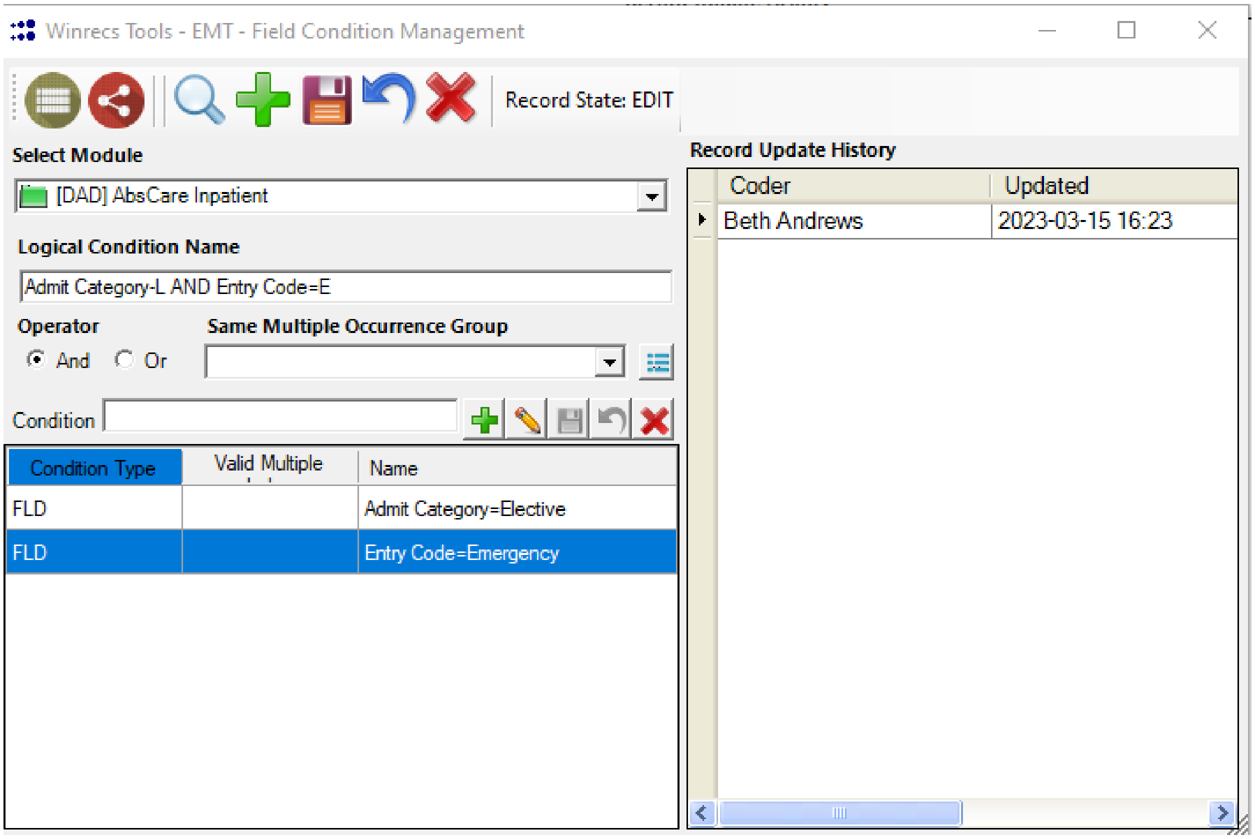
Condition Type	Name
FLD	Exp1 AdmitCatL
FLD	Exp1 EntryCodeE
FLD	Exp2 Dx MitralStenosis
FLD	TEST Exp3 SCU 50
FLD	TEST Exp3 AgeCodeM
FLD	TEST Exp3 AgeNumber >=12
FLD	Exp4 EntryCodeD
FLD	Exp4 DispCode07
FLD	Exp6 DxCode not J44
FLD	Exp3 Postal Code K2 or K4
FLD	Exp5 Postal Code K2 and K4
FLD	Exp5 Residence Code not 02521
FLD	Exp6 DxCodeJ18
FLD	Age Great than 100
FLD	Exp7 PatService51
FLD	Exp9 DxCodes3-7
FLD	Exp7 IntervProvNum
FLD	Exp20 Dx Code J44
FLD	Exp20 Dx Code not J18
FLD	Exp8 IntervProvService
FLD	Exp8 PatService51
FLD	Exp9 DxCodes8
FLD	TEST Exp3 AgeCode Y
FLD	Admit Category=Elective

☑ Active Values Only

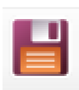
☐ Return Top 100 Results

Select Record

97 Matches Found



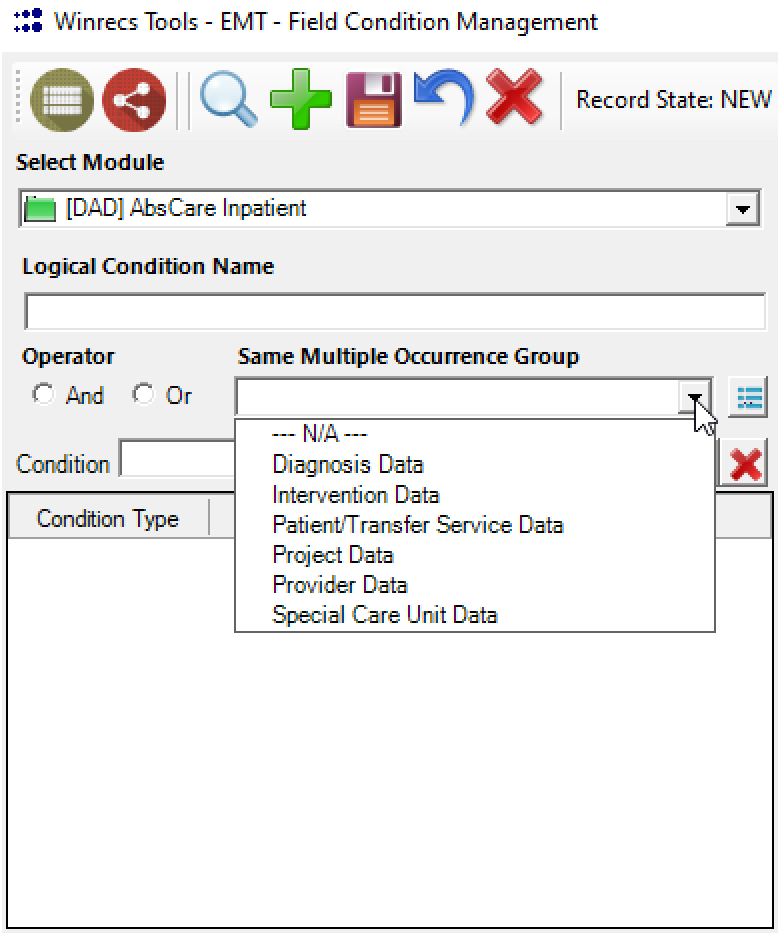
Save F7



Same Occurrence (Multiforms)

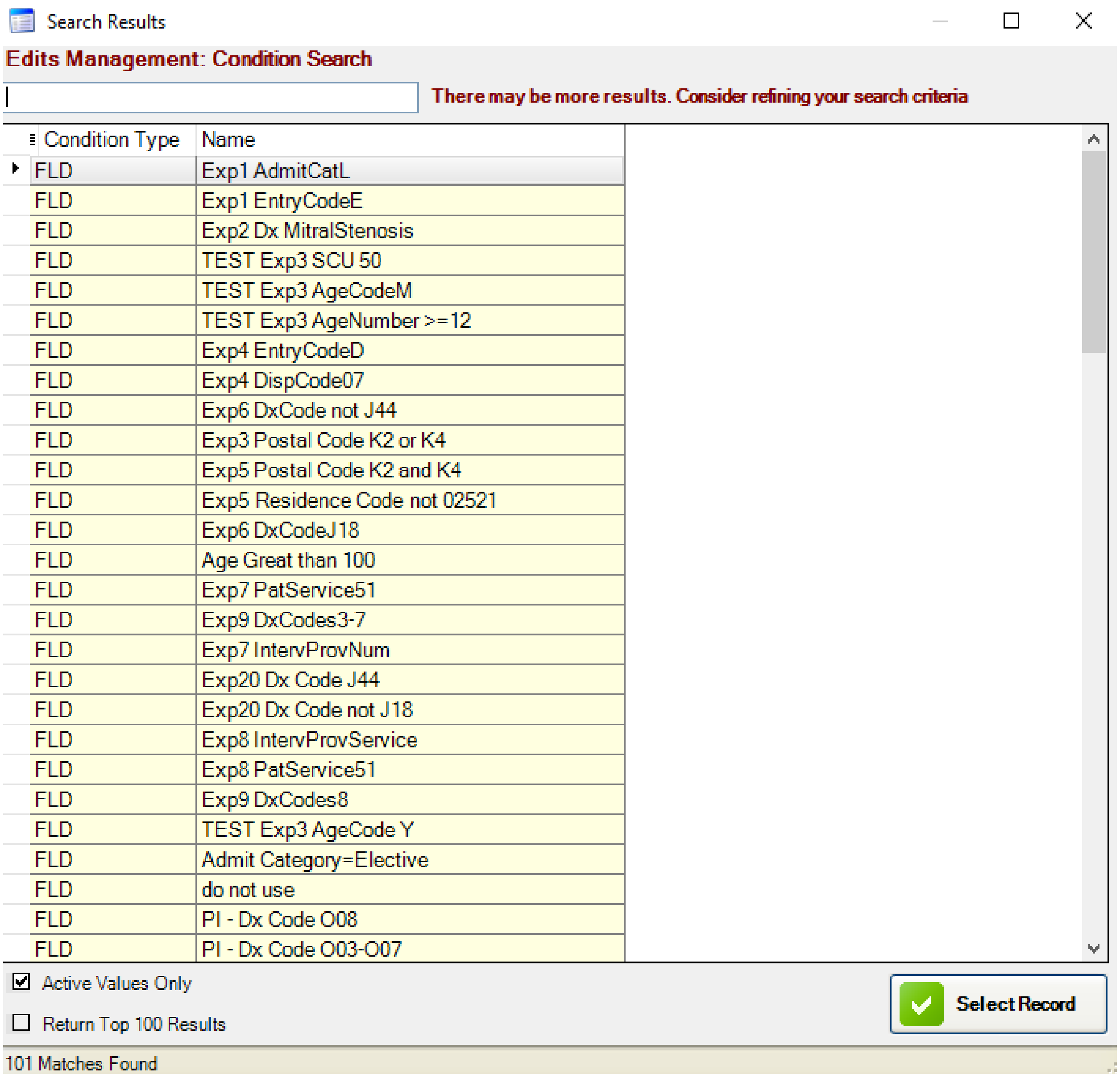
When combining two or more conditions (Field and/or Logical Condition) together, it is possible to create a Logical Condition that refers to fields in a multiform. The edit may refer to fields from the SAME Occurrence.

When click on Same Multiple Occurrence Group, a drop down list will display all the multiform sections.

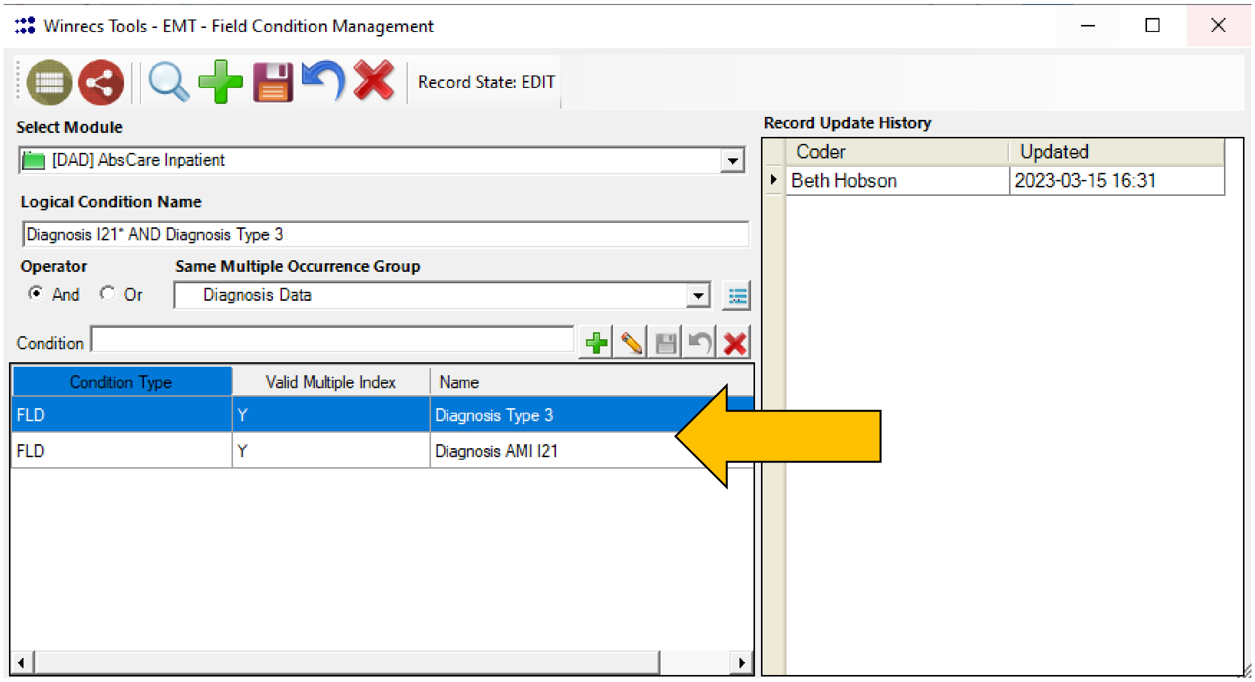


To select a conditions click the  to enable the Condition field.

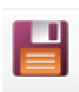
Click F2 to display the list of Conditions to select from.



When select the Field and/or Logical Conditons, they will display in a list.



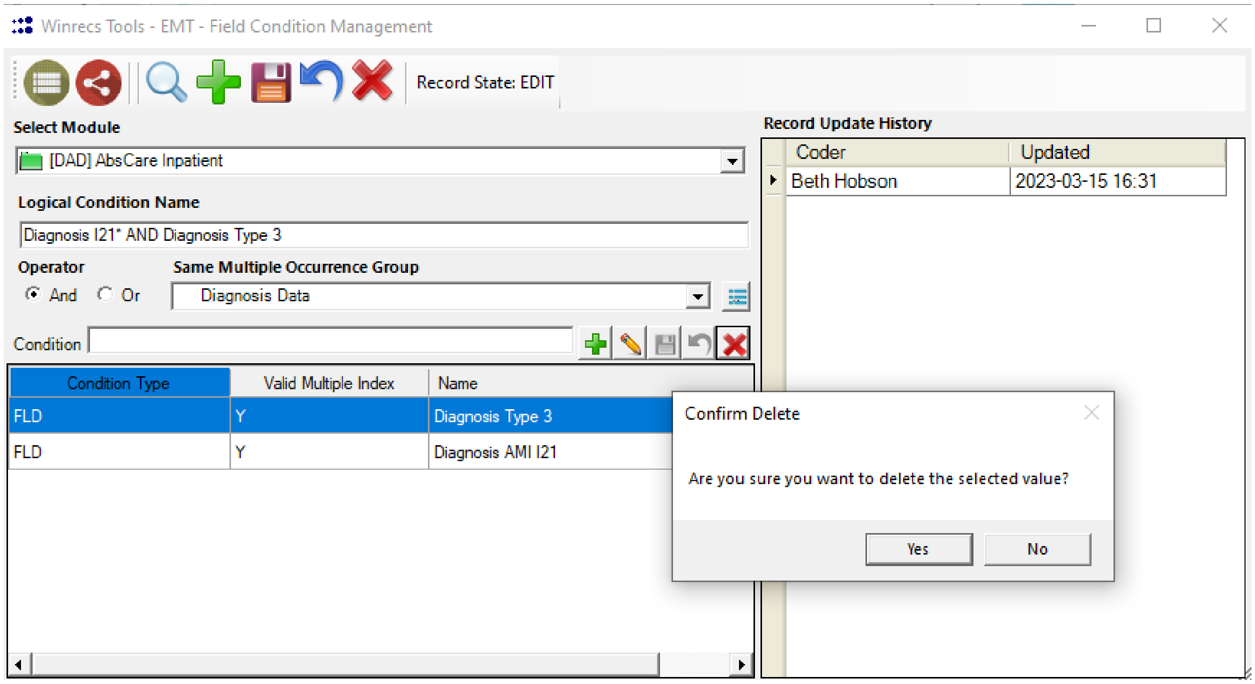
Save F7



Delete Condition

If the Logical Condition is not for the Same Occurrence, click the Del. Condition button.

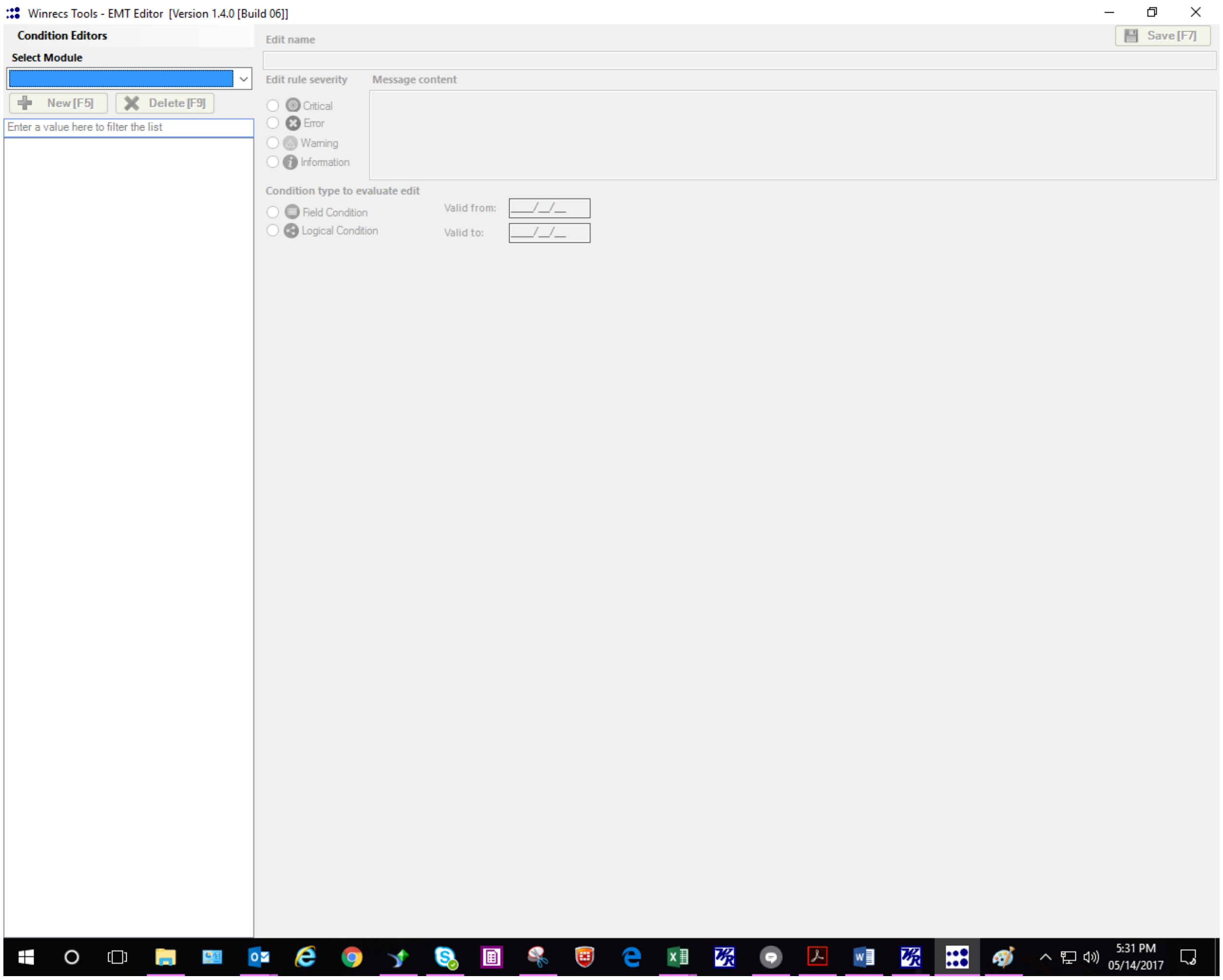
F9 Delete



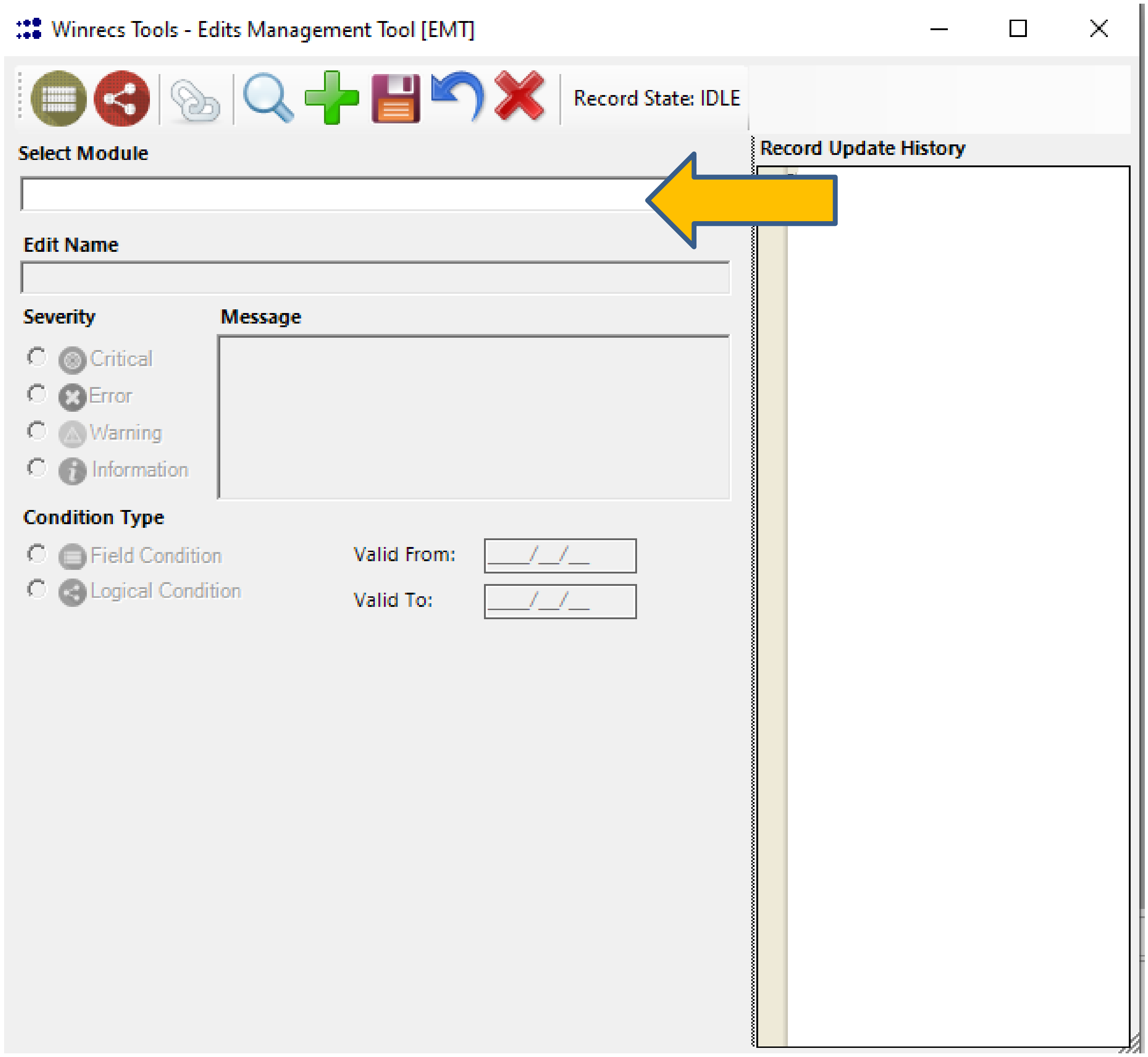
Click Yes to delete this logical condition.

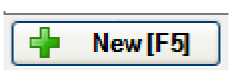
Create Edit Message

Tools>Edits Management Tool (EMT)

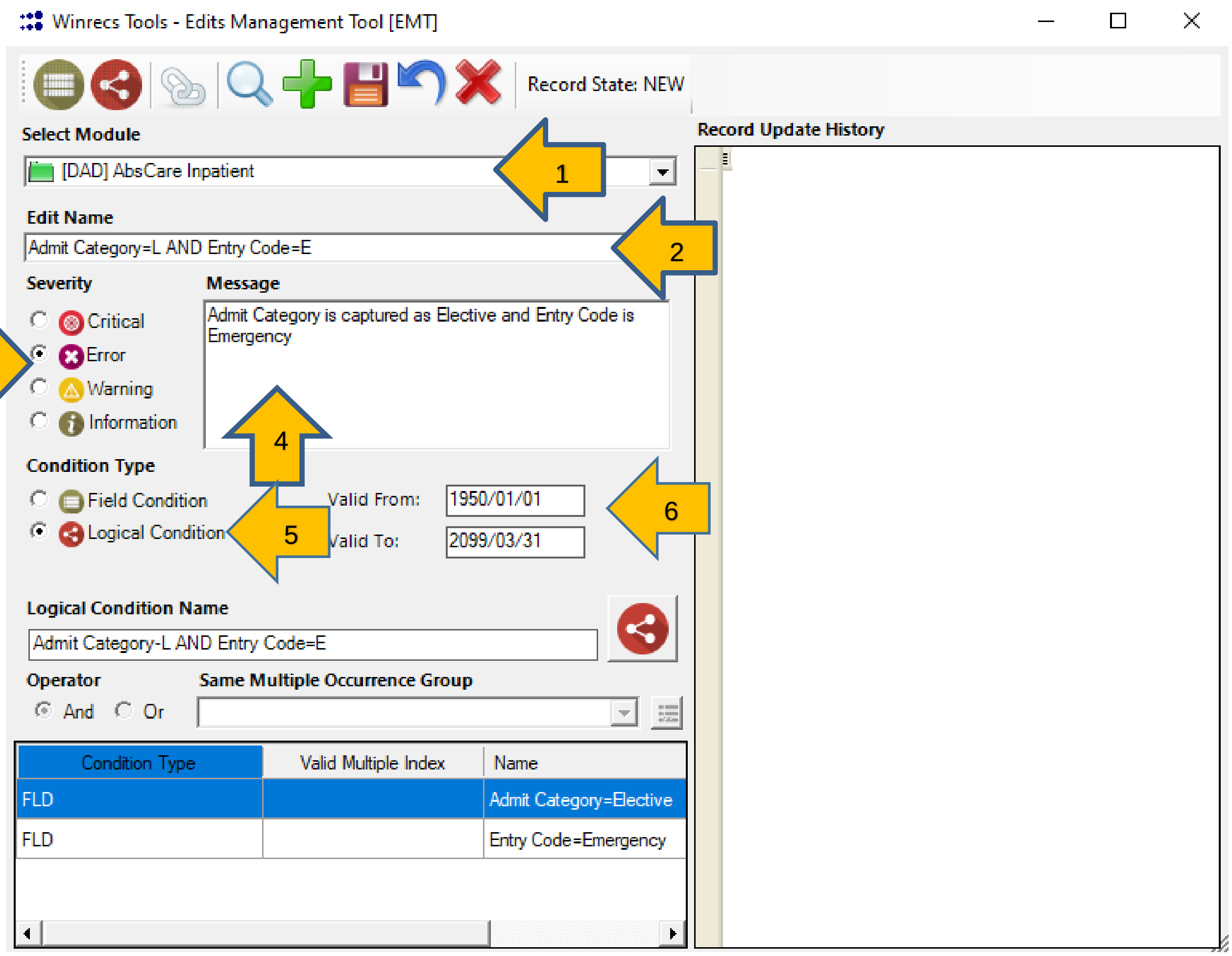


Select Module



Click 

Areas of the Edits Management Tool Editor



1. Select Module
   In order to enable the editor, must first select the module. The edit will only display in the module you select.

2. Edit Name
   The name usually reflects the fields and conditions involved.

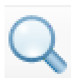
3. Edit Rule Severity Level
   In the abstract in the message list box, the content is represented by a severity level. All EMT edit icons will have a turquoise frame.

Dark Red	Critical
Red	Error
Yellow	Warning
Blue	Information

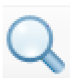
4. Message Content
   The content that will display in the abstract.

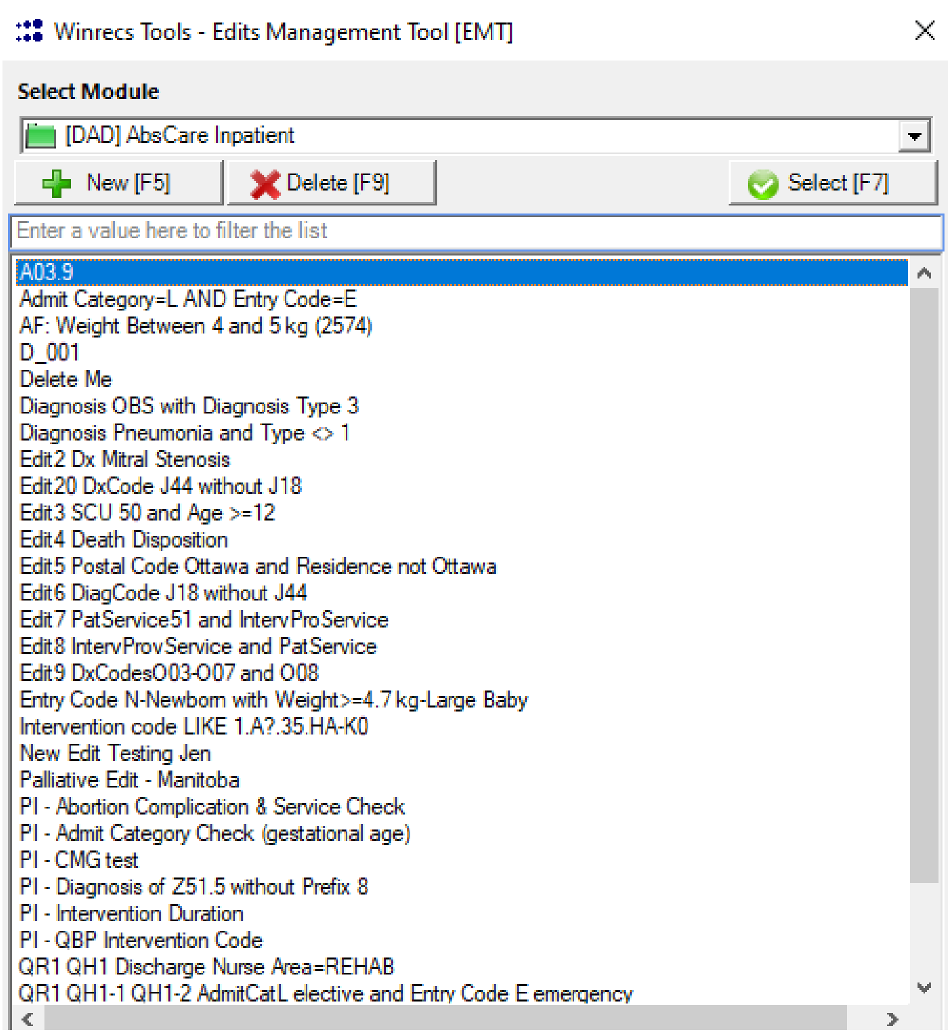
5. Condition Types
   Must create and select the Field and Logical Conditions that will be used in the Edit.

6. Valid From and To date
   Edit must have a Valid From and Valid To date in order to generate. The edit will generate based on the key date of the abstract.

7. F4  to search for existing edits

Search F4 for existing edits





Creating an Edit

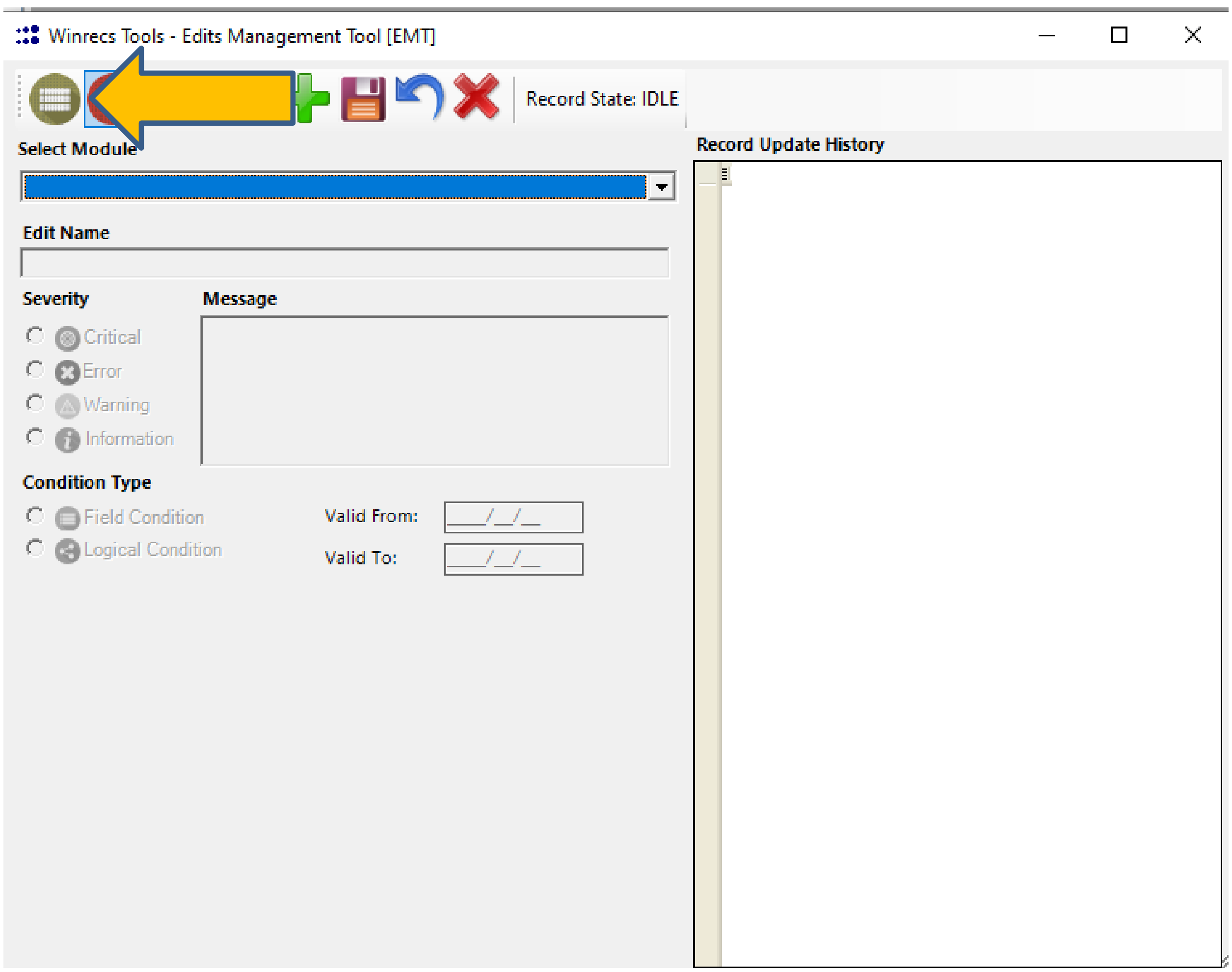
Scenario

When the ER visit has a Death Disposition Code and the Triage Level is not Resuscitation generate a message.

MESSAGE:
“Death Disposition must have a Triage Level 1”

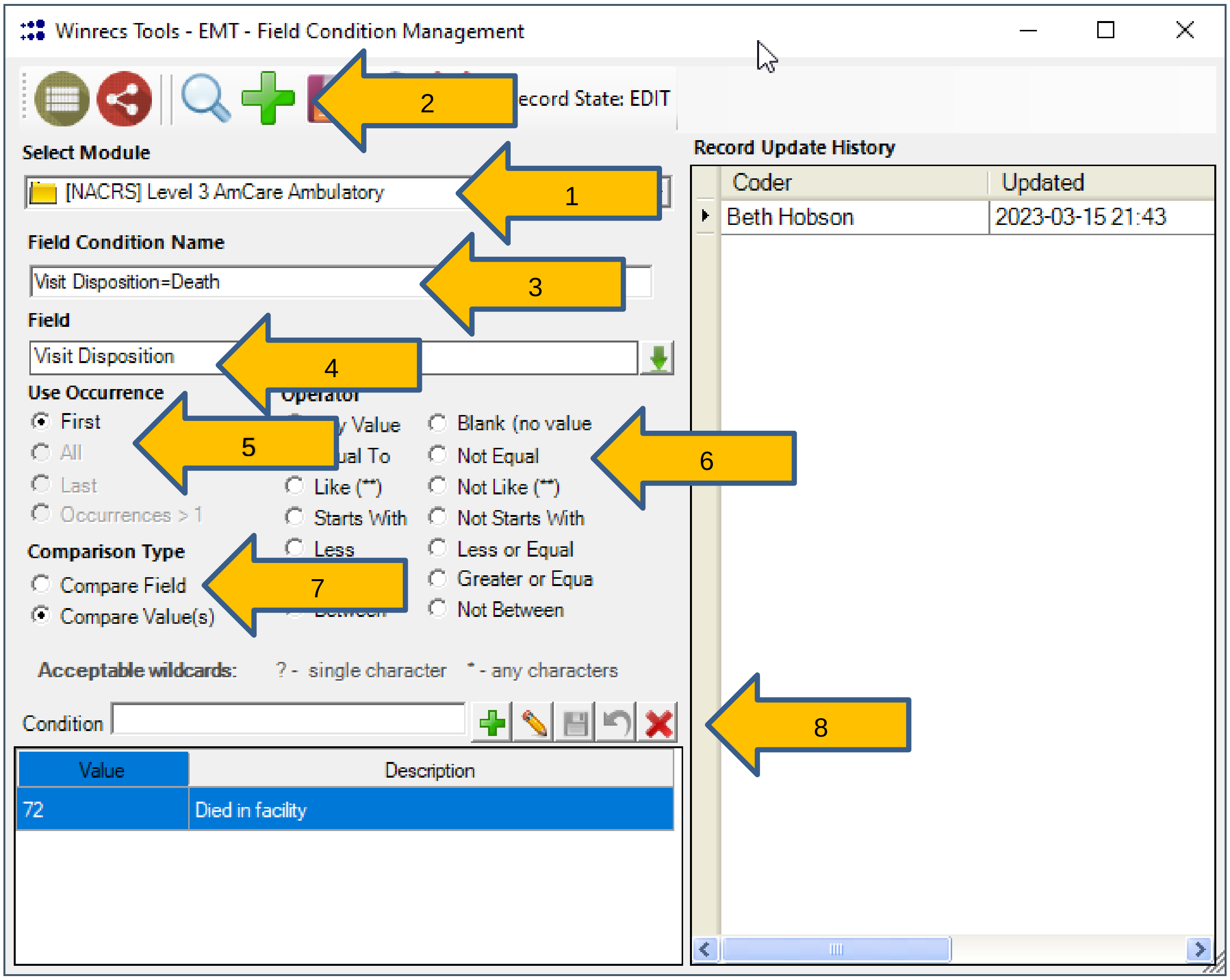
Step 1: Create Field Condition(s)

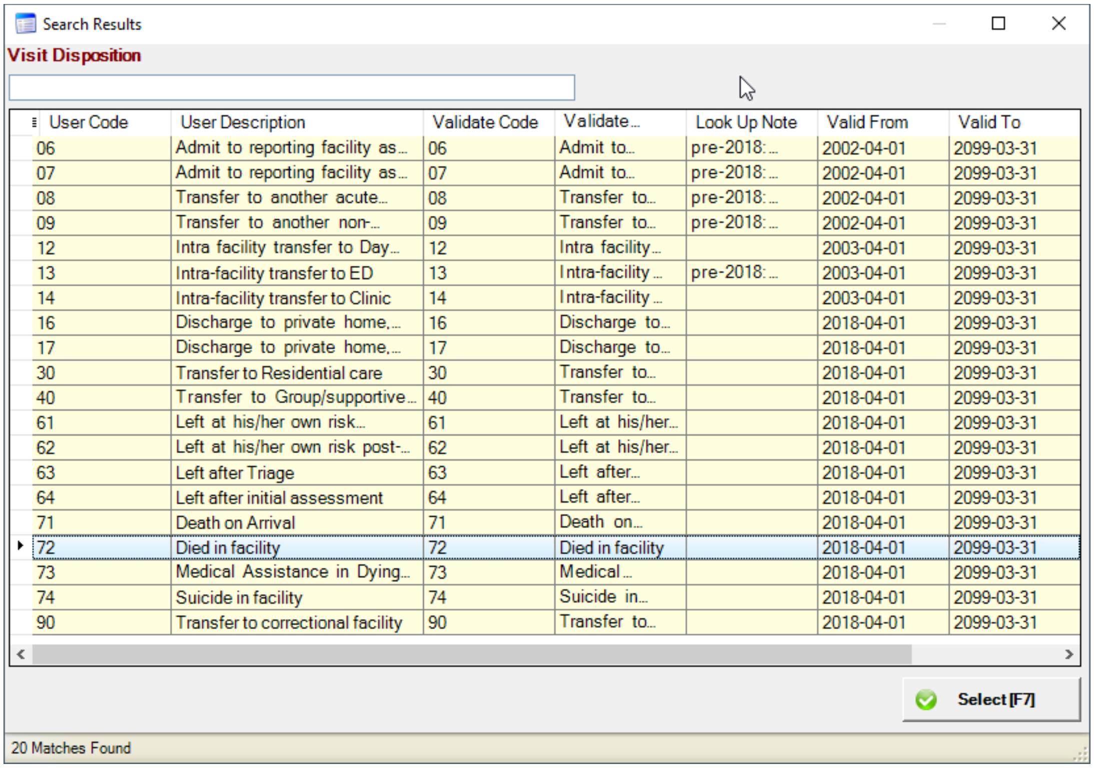
Click on Field Condition Editor



1. Select Module
2. Click NEW
3. Name Field Condition

4. Select Field
5. Select Occurrence if necessary
6. Select Operator
7. Select Comparison Type
8 Click PLUS sign and select values





Search Results

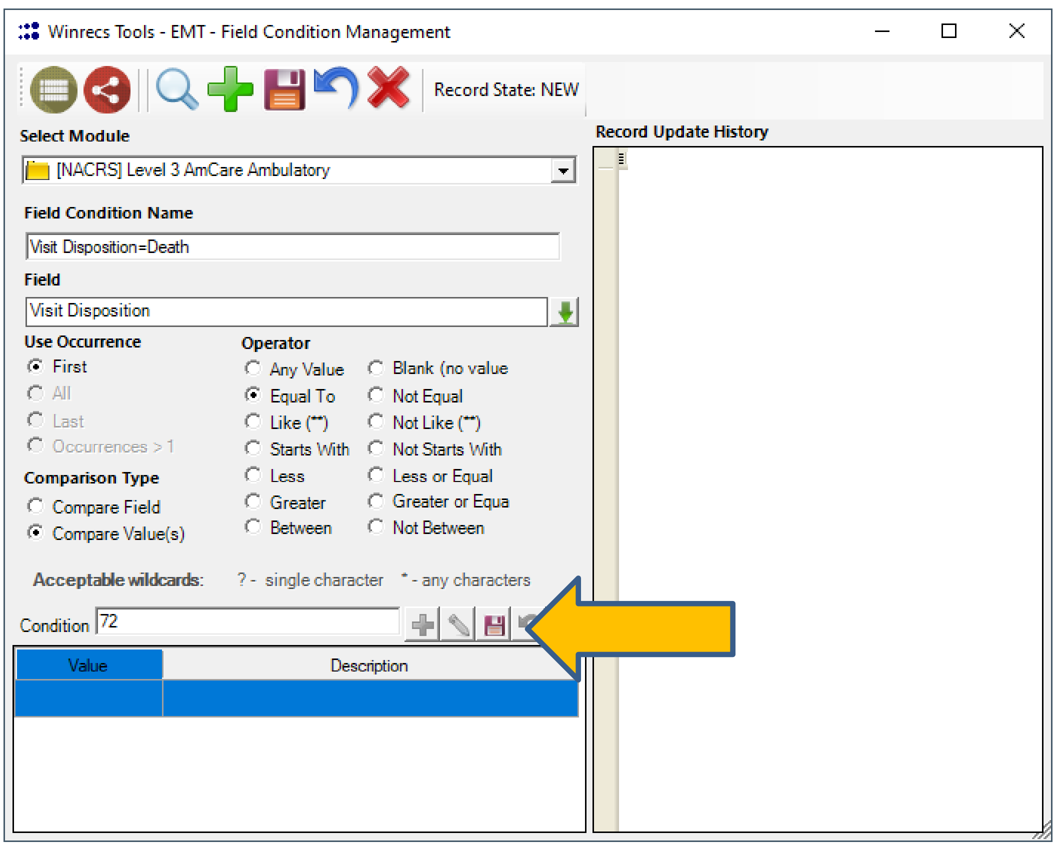
Visit Disposition

User Code	User Description	Validate Code	Validate...	Look Up Note	Valid From	Valid To
06	Admit to reporting facility as...	06	Admit to...	pre-2018:...	2002-04-01	2099-03-31
07	Admit to reporting facility as...	07	Admit to...	pre-2018:...	2002-04-01	2099-03-31
08	Transfer to another acute...	08	Transfer to...	pre-2018:...	2002-04-01	2099-03-31
09	Transfer to another non-...	09	Transfer to...	pre-2018:...	2002-04-01	2099-03-31
12	Intra facility transfer to Day...	12	Intra facility...		2003-04-01	2099-03-31
13	Intra-facility transfer to ED	13	Intra-facility ...	pre-2018:...	2003-04-01	2099-03-31
14	Intra-facility transfer to Clinic	14	Intra-facility ...		2003-04-01	2099-03-31
16	Discharge to private home,...	16	Discharge to...		2018-04-01	2099-03-31
17	Discharge to private home,...	17	Discharge to...		2018-04-01	2099-03-31
30	Transfer to Residential care	30	Transfer to...		2018-04-01	2099-03-31
40	Transfer to Group/supportive...	40	Transfer to...		2018-04-01	2099-03-31
61	Left at his/her own risk...	61	Left at his/her...		2018-04-01	2099-03-31
62	Left at his/her own risk post-...	62	Left at his/her...		2018-04-01	2099-03-31
63	Left after Triage	63	Left after...		2018-04-01	2099-03-31
64	Left after initial assessment	64	Left after...		2018-04-01	2099-03-31
71	Death on Arrival	71	Death on...		2018-04-01	2099-03-31
72	Died in facility	72	Died in facility		2018-04-01	2099-03-31
73	Medical Assistance in Dying...	73	Medical...		2018-04-01	2099-03-31
74	Suicide in facility	74	Suicide in...		2018-04-01	2099-03-31
90	Transfer to correctional facility	90	Transfer to...		2018-04-01	2099-03-31

Select [F7]

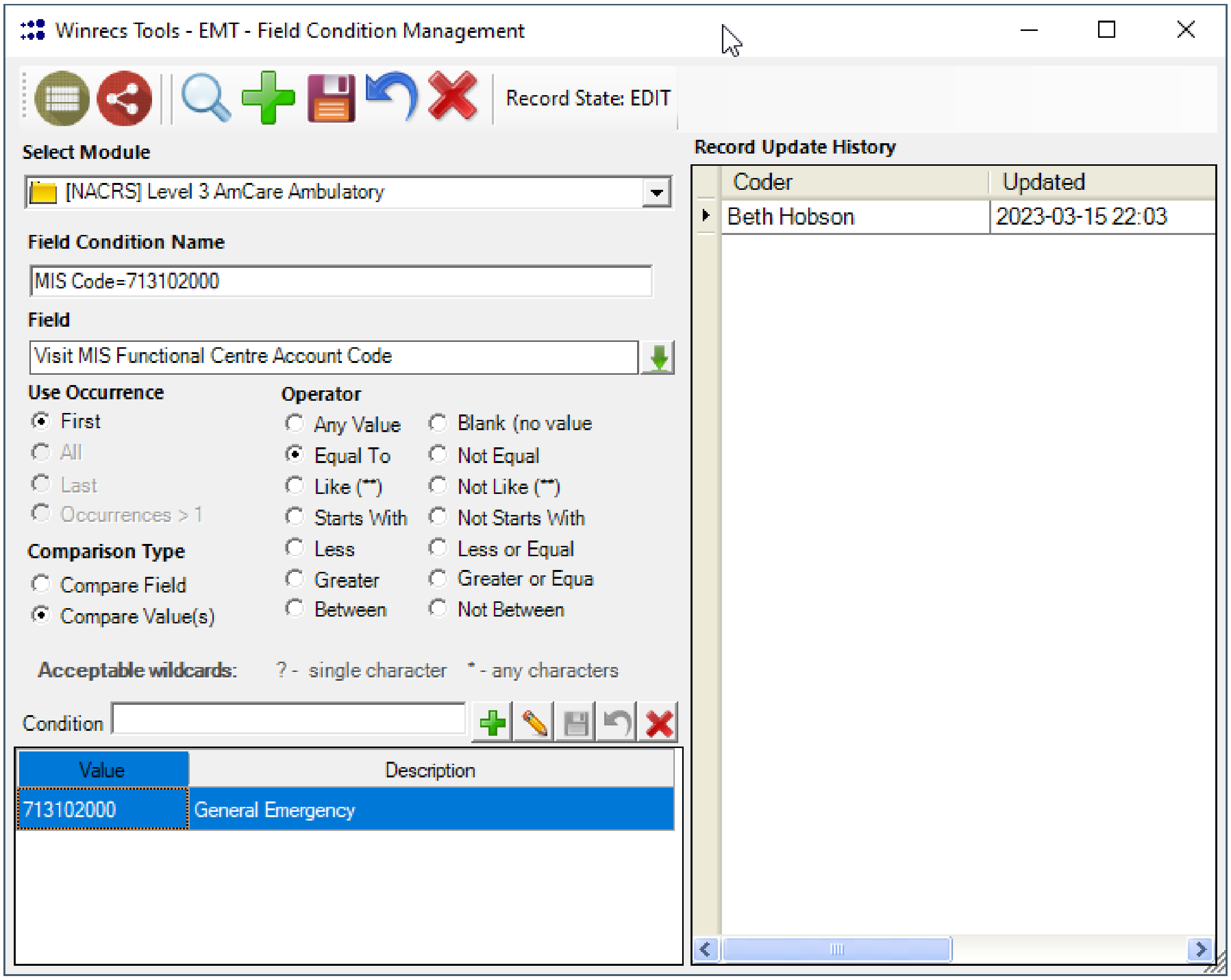
20 Matches Found

Click Save Icon to save value(s)



Field Condition #1
MIS Code =713102000

Condition type to evaluate edit
    Field Condition
    New [F5]
Field Condition Name
    FLD ER MIS Code 713102000
Select Field in Drop Down
    Visit MIS Code
User Field Occurrence
    First Occurrence
Field Condition Operator
    Equal To
Comparison type
    Compare value 713102000
    Click Plus Icon to add value(s)
    Click Save Icon to save value(s)
Save Condition



Field Condition #2

Death Disposition = 10 or 11

Condition type to evaluate edit

Field Condition

New [F5]

Field Condition Name

FLD Death Disposition Code 10 or 11

Select Field in Drop Down

Visit Disposition Code

User Field Occurrence

First Occurrence

Field Condition Operator

Equal To

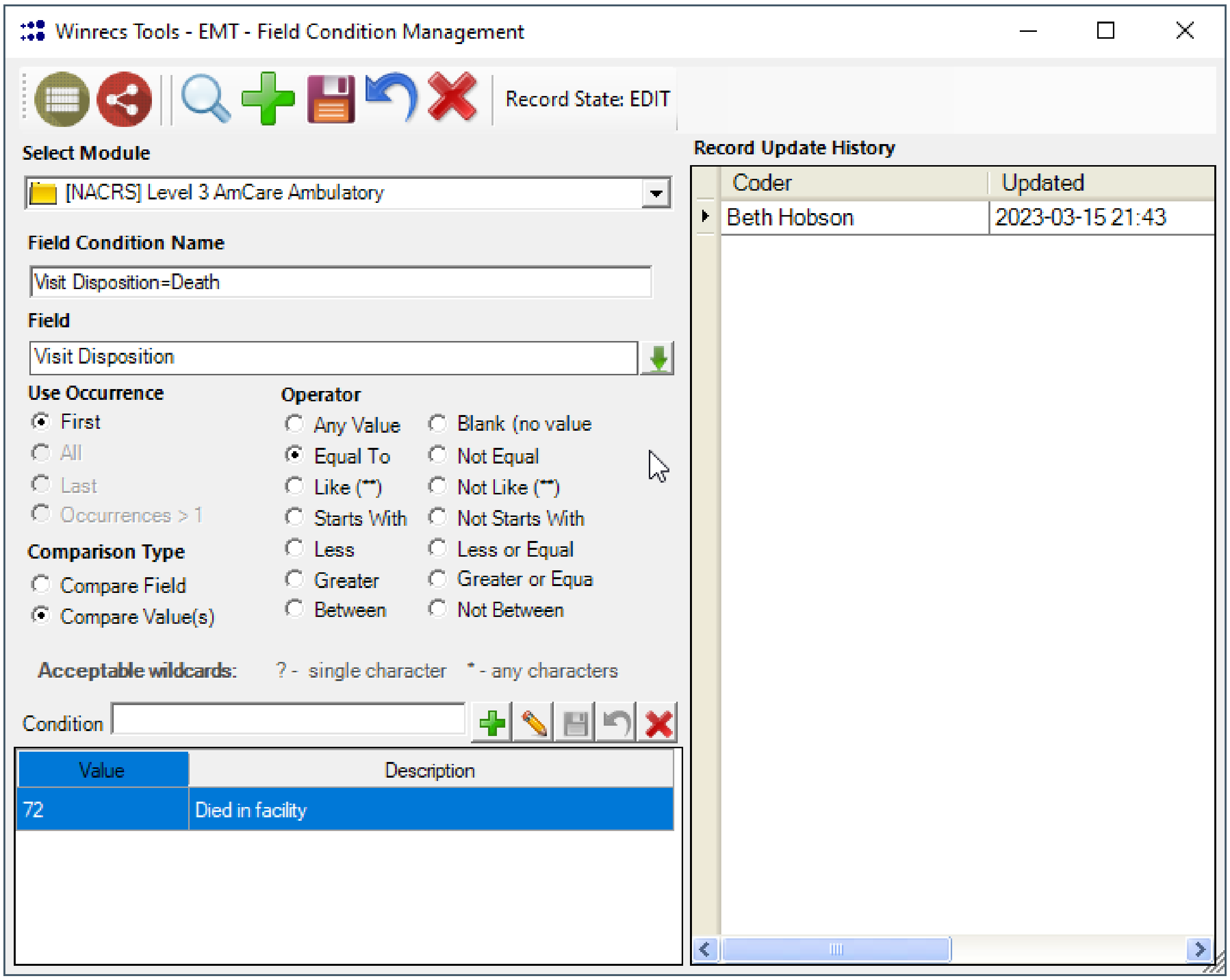
Comparison type

Compare value 10, 11

Click Plus Icon to add value(s)

Click Save Icon to save value(s)

Save [F7]



Field Condition #3

Triage Level not 1-Resusitation

Condition type to evaluate edit

Field Condition

New [F5]

Field Condition Name

FLD Triage Level not 1-Resusitation

Select Field in Drop Down

Triage Level

User Field Occurrence

First Occurrence

Field Condition Operator

Not Equal To

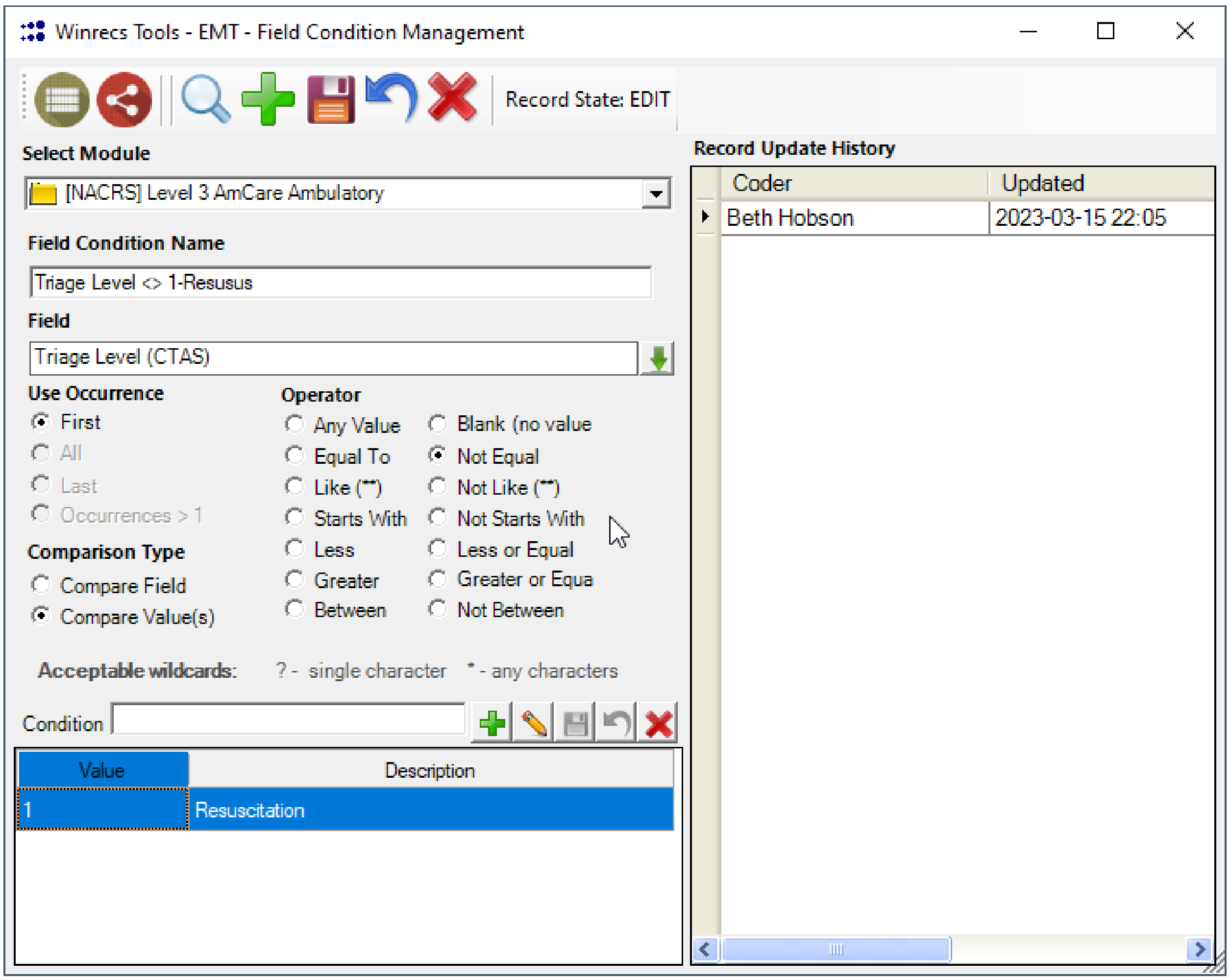
Comparison type

Compare value 1

Click Plus Icon to add value(s)

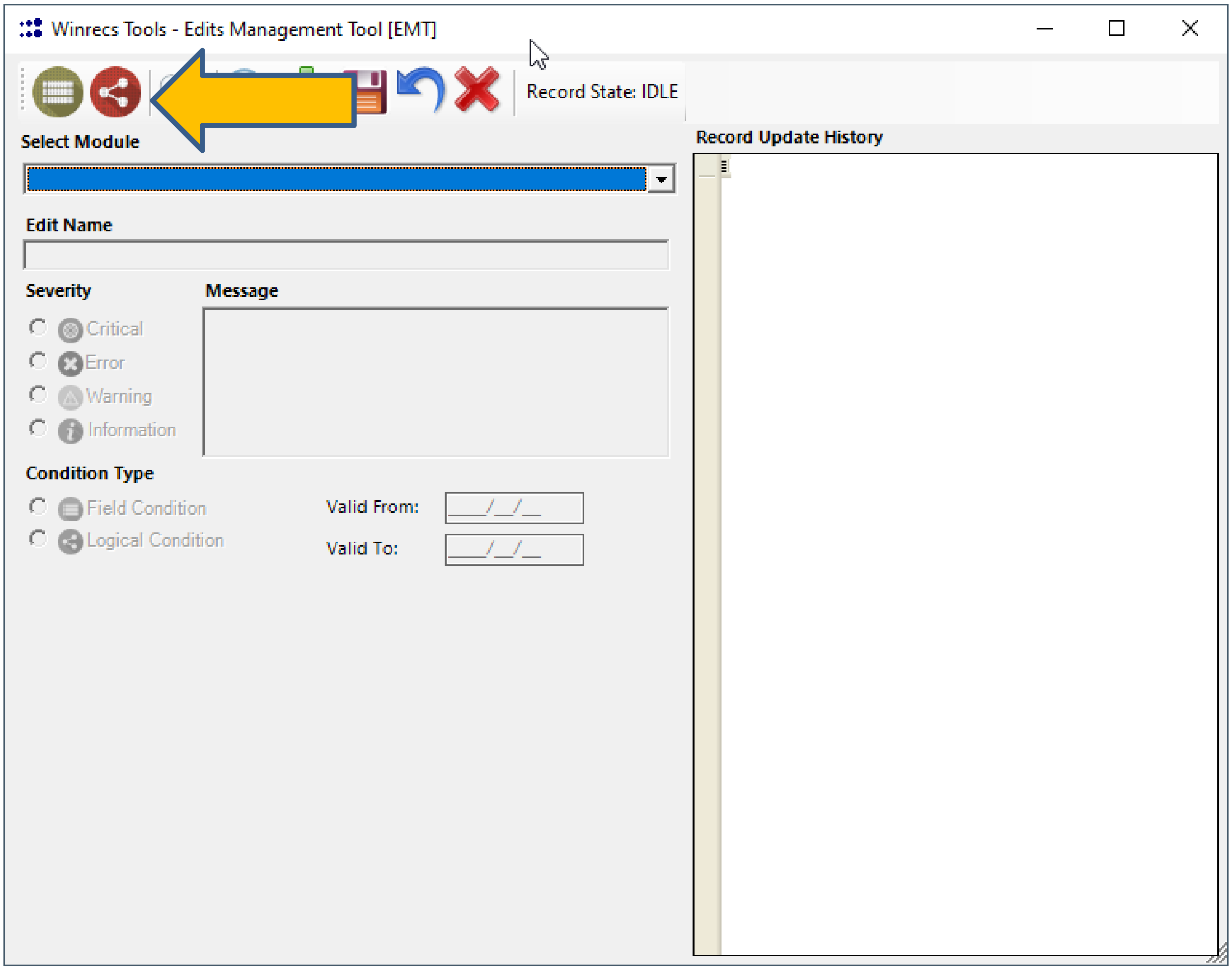
Click Save Icon to save value(s)

Save [F7]

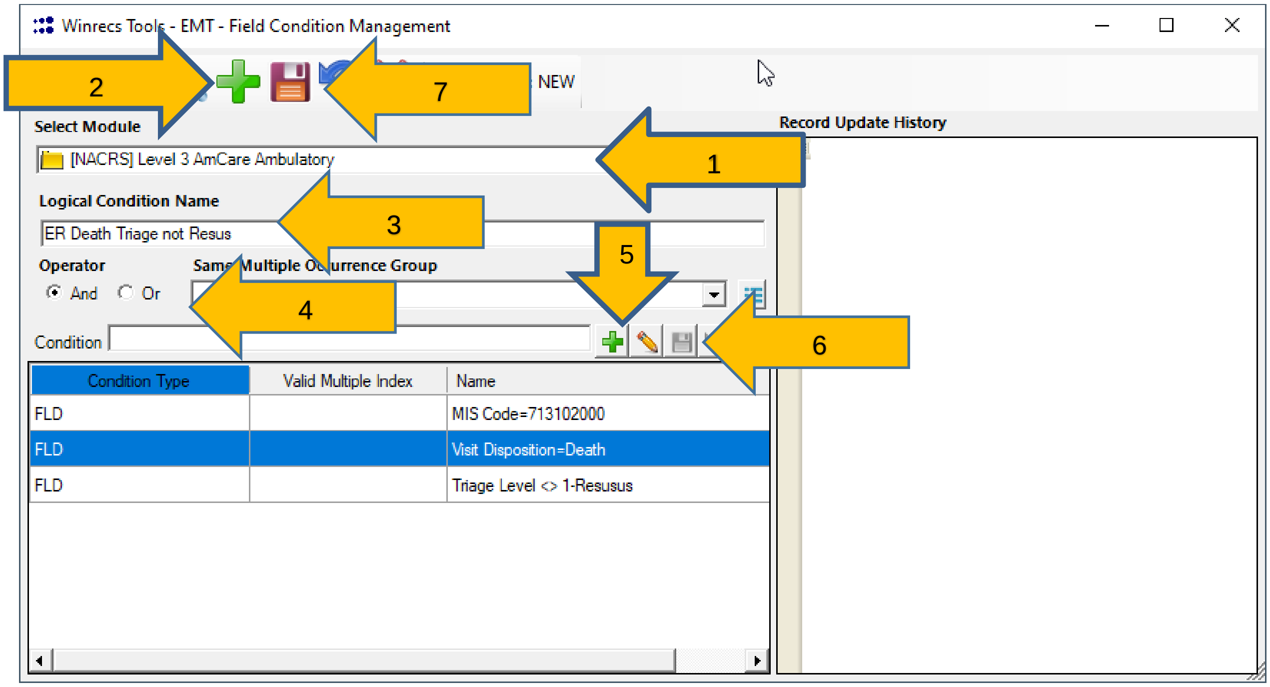


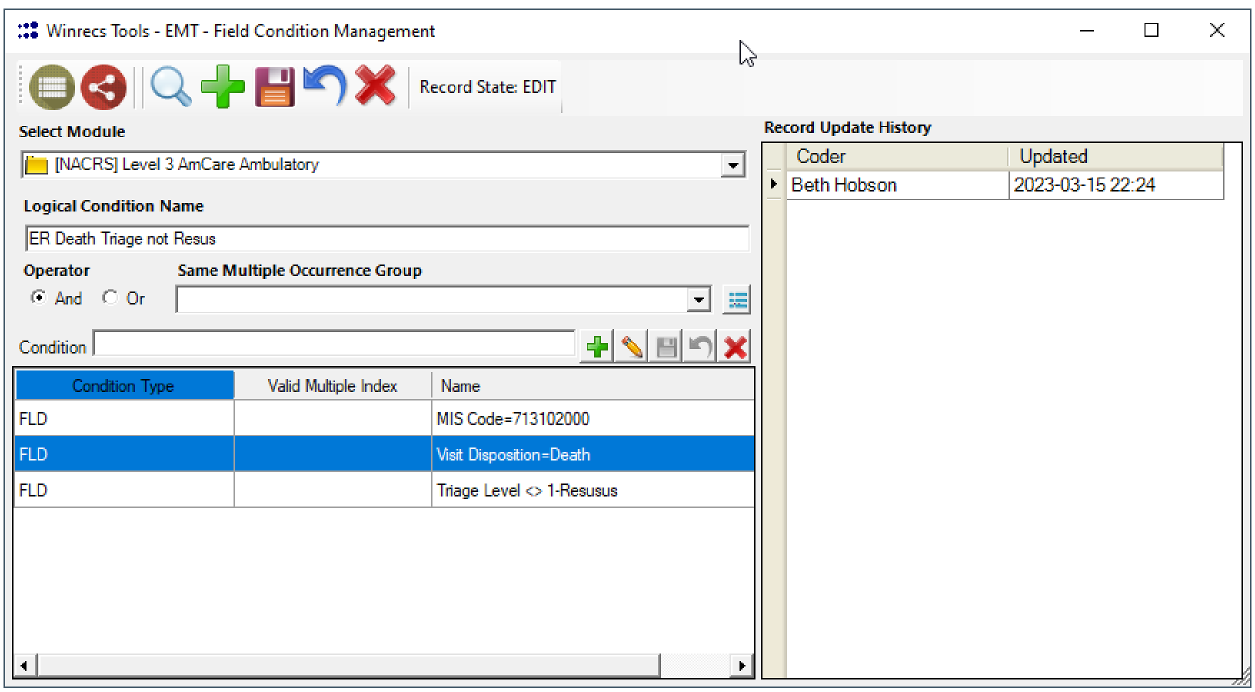
Step 2: Create Logical Condition(s)

Click on Logical Condition Editor



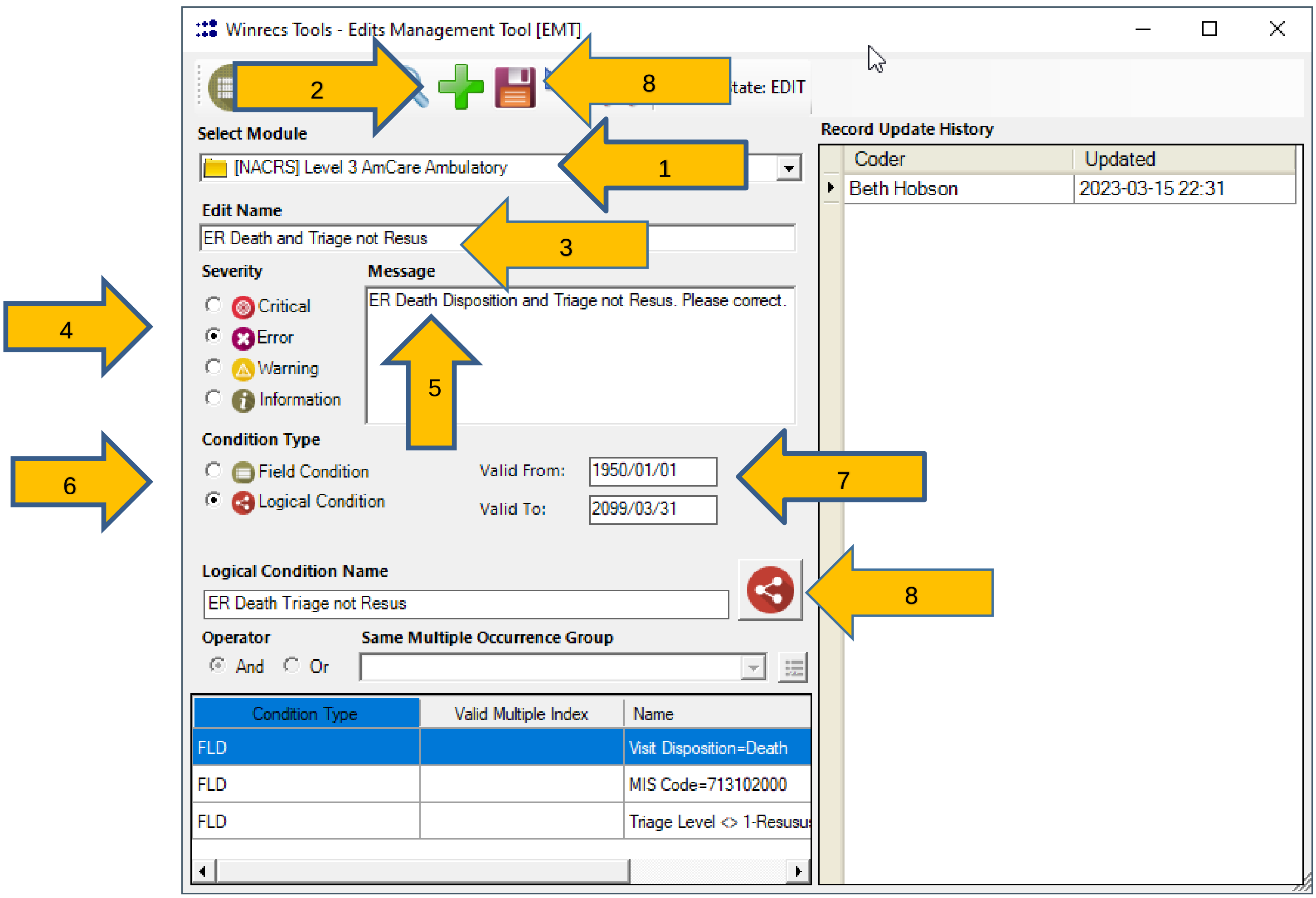
1. Select Module
2. Click NEW
3. Logical Condition Name
4. Select Operator
5. Select PLUS sign to add conditions
6. Click save to save conditions involved
7. Click save in Tool Bar


Winrecs Tools - EMT - Field Condition Management
2
7
NEW
Select Module
Record Update History
[NACRS] Level 3 AmCare Ambulatory
1
Logical Condition Name
ER Death Triage not Resus
3
5
Operator
Same Multiple Occurrence Group
And
Or
4
Condition
6
Condition Type
Valid Multiple Index
Name
FLD
MIS Code=713102000
FLD
Visit Disposition=Death
FLD
Triage Level <> 1-Resusus


Winrecs Tools - EMT - Field Condition Management
Record State: EDIT
Select Module
Record Update History
[NACRS] Level 3 AmCare Ambulatory
Coder
Updated
Beth Hobson
2023-03-15 22:24
Logical Condition Name
ER Death Triage not Resus
Operator
Same Multiple Occurrence Group
And
Or
Condition
Condition Type
Valid Multiple Index
Name
FLD
MIS Code=713102000
FLD
Visit Disposition=Death
FLD
Triage Level <> 1-Resusus

Step 3: Create Edit

1. Select the Module
2. Click New
3. Edit Name
4. Select Severity level
5. Input Message
6. Select Condition Type
7. Enter Valid From and Valid To date
8. Click on Logical Condition icon and select Logical Condition
9. Click save icon to save Edit.



Deleting an Edit

In order to delete an edit so it no longer displays in the abstract, click F9 Delete

Delete Logical Condition

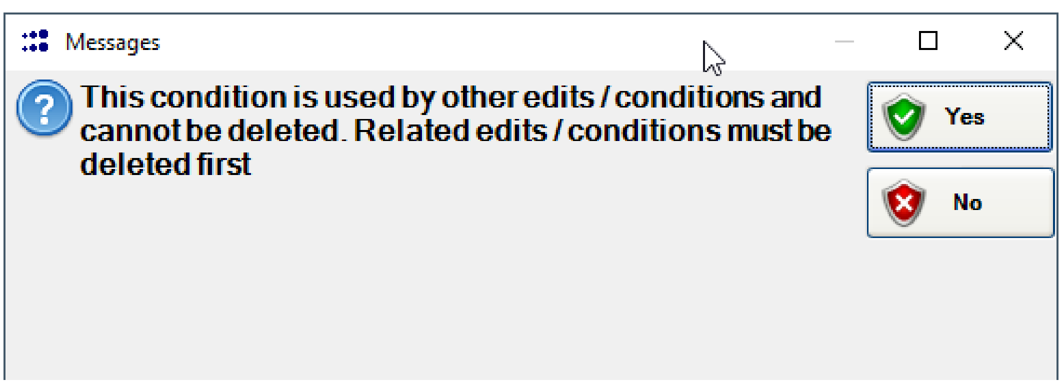
In order to delete a Logical Condition, it cannot be used in another edit or another Logical Condition. To delete a Logical Condition click F9 Delete

If a Logical Condition is used in another edit, a prompt will display.

Delete Field Condition

Field Conditions can only be deleted if not used in a Logical Condition or another edit. In order to delete a Field Condition click F9 Delete

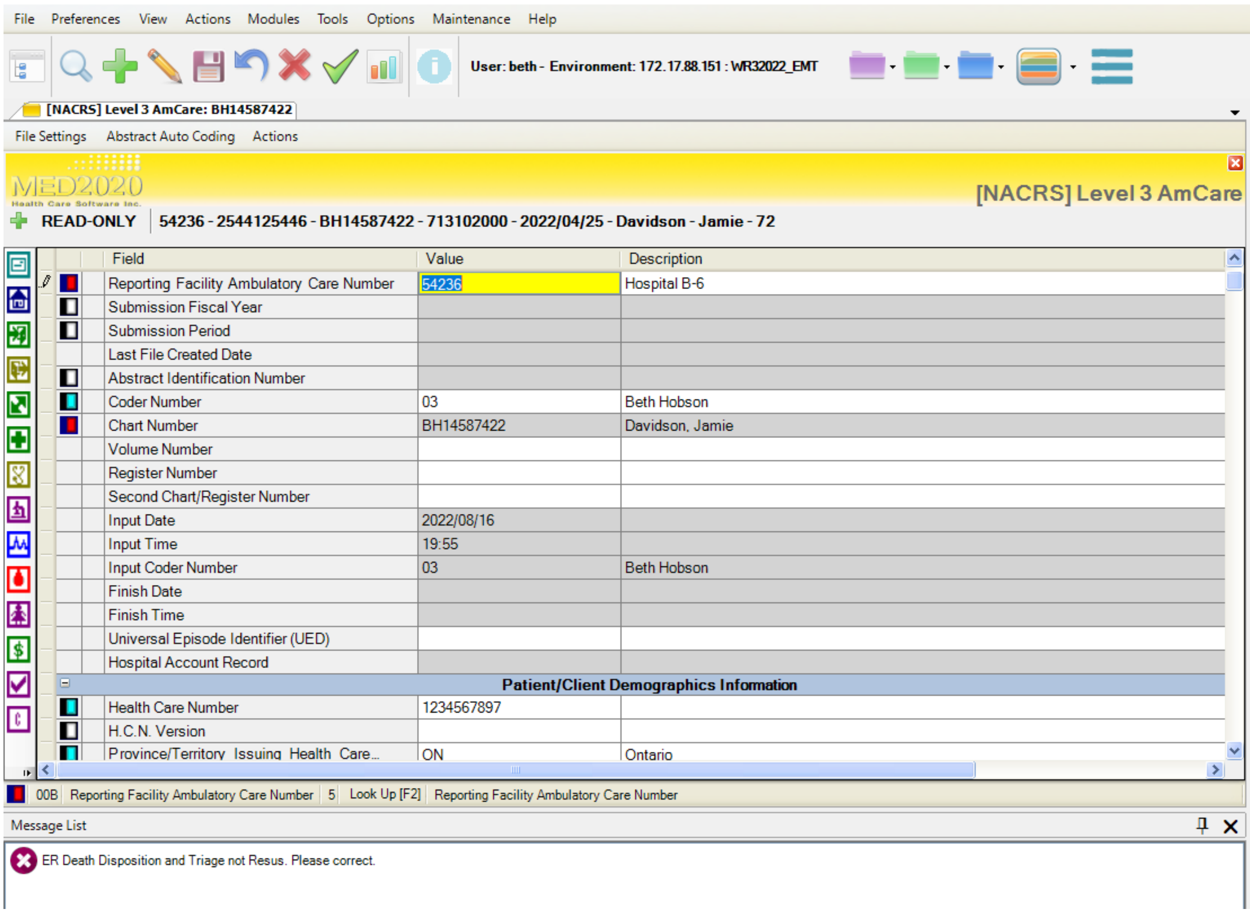
If a Field Condition is used in another edit, a prompt will display.



Access visit and verify abstract

Amcare Abstract

Message should generate in message list box. If message does not generate upon load, F11 Verfiy.



Is Custom Validated field

In the abstract there is a field called 'Is Custom Validated'. The Valid Values are:

Yes

When there are no EMT messages generated when abstract is verified, the field will populate a Y.

Custom Errors Found

When there are EMT messages that contain errors, the field will populate an E.

Custom Warnings Found

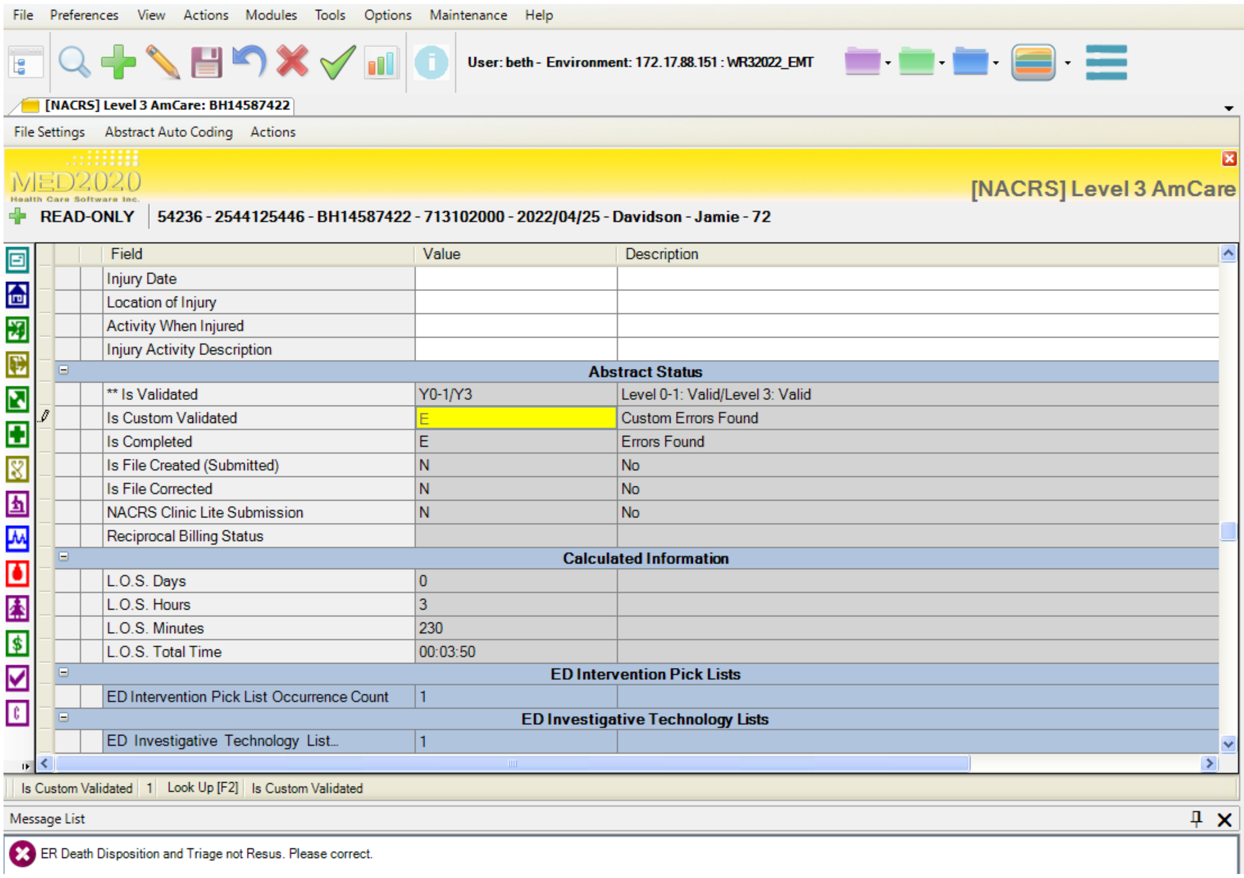
When there are EMT messages that contain warnings, the field will populate a W.

Custom Information Found

When there are EMT message that contains information, the field will populate an I.

No

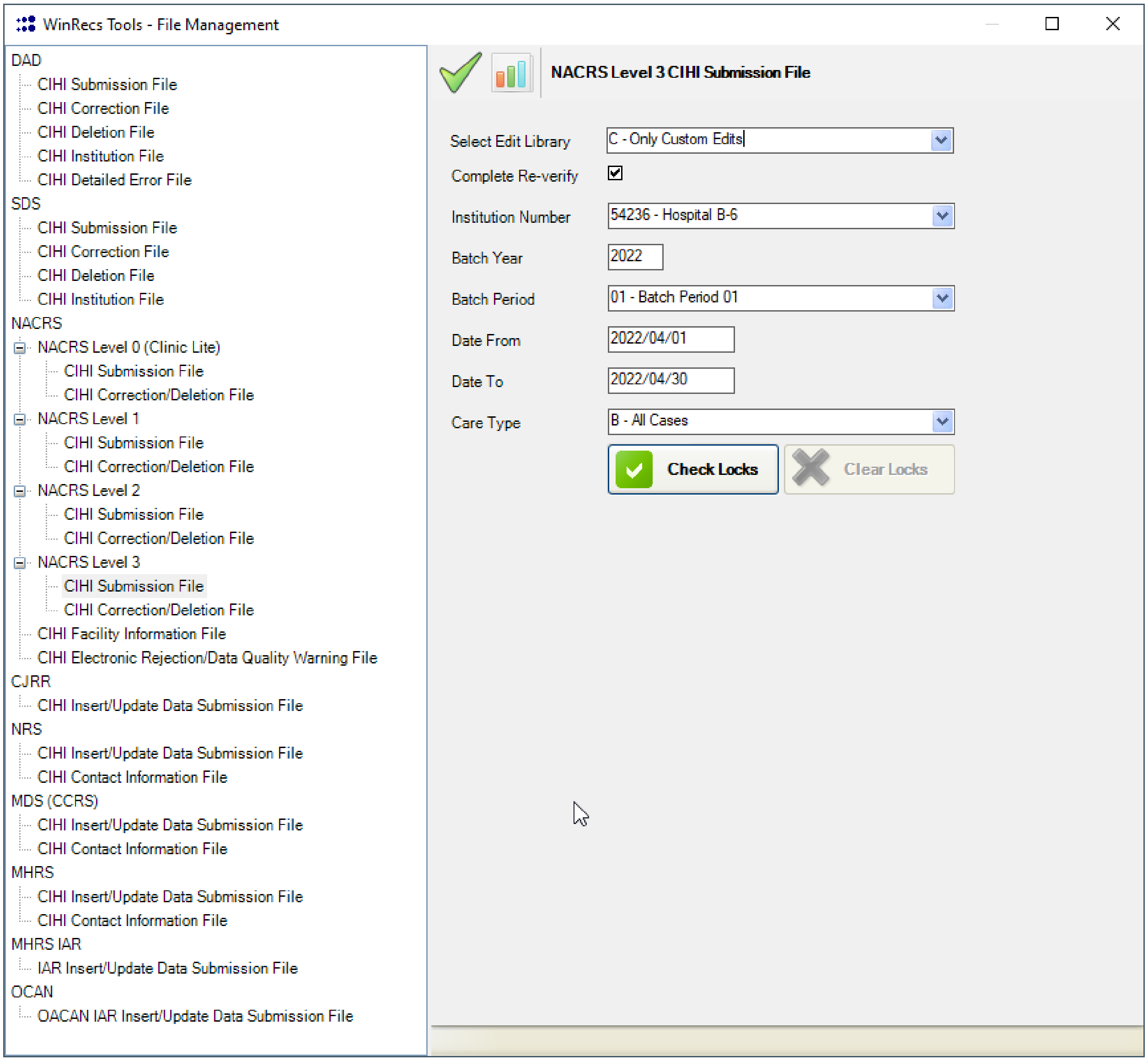
When EMT message are not yet verified in the abstract, this field will populate an N.



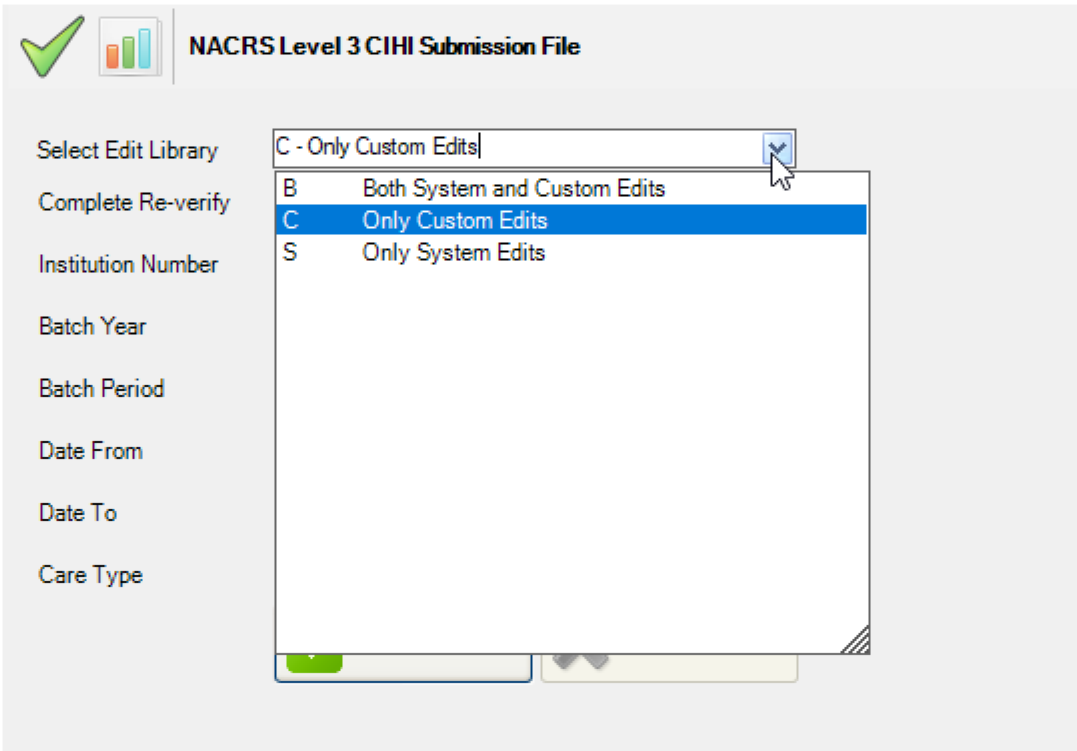
Batch Verify

An option to verify all visits to see if EMT edits apply.

Tools>File Management>Submission File



Select Edit Library

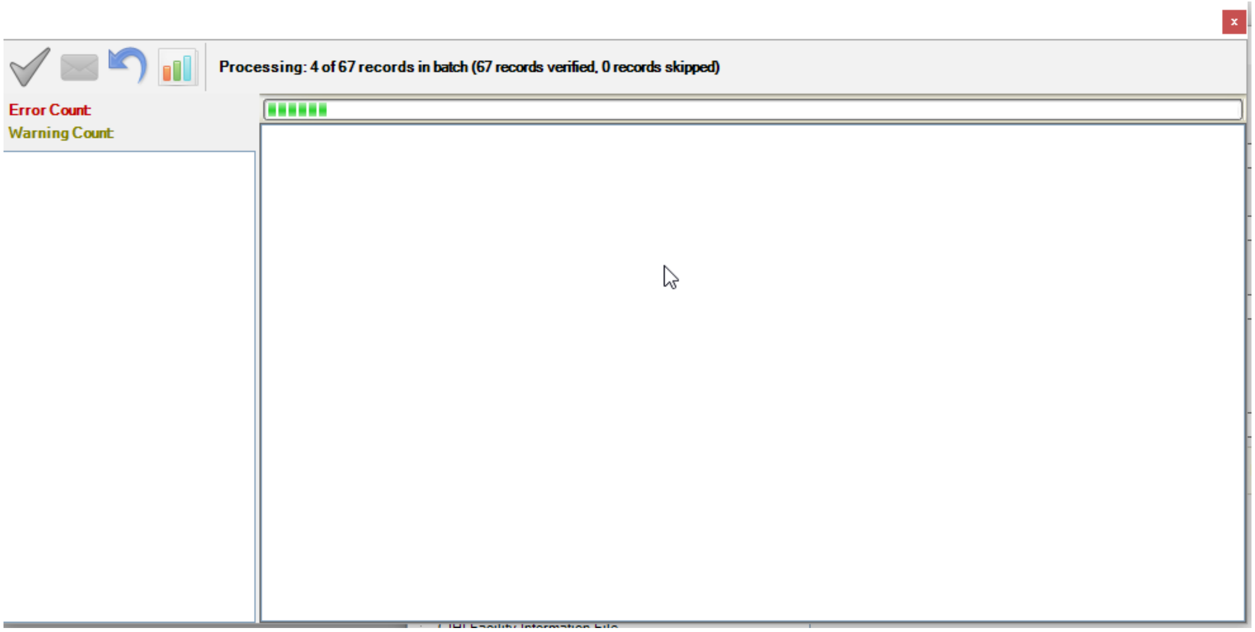


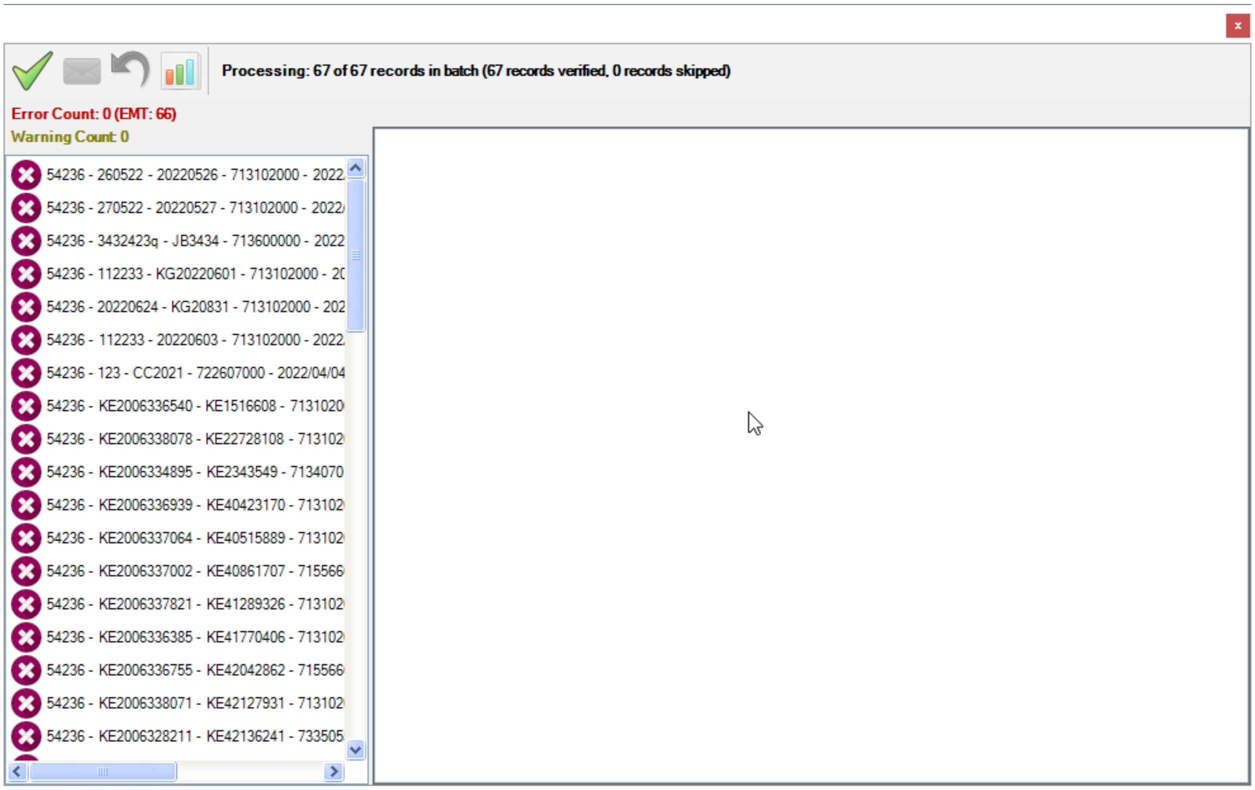
Both System and Custom Edits
This will perform the verify on the CIHI or provincial edits along with EMT edits at the same time.

Only Custom Edits
This will perform the verify on the EMT edits only.

Only System Edits
This will perform the verify on the CIHI and provincial edits only.

When click Verify


Processing: 4 of 67 records in batch (67 records verified, 0 records skipped)
Error Count
Warning Count


Processing: 67 of 67 records in batch (67 records verified, 0 records skipped)
Error Count: 0 (EMT: 66)
Warning Count: 0
54236 - 260522 - 20220526 - 713102000 - 2022
54236 - 270522 - 20220527 - 713102000 - 2022
54236 - 3432423q - JB3434 - 713600000 - 2022
54236 - 112233 - KG20220601 - 713102000 - 20
54236 - 20220624 - KG20831 - 713102000 - 202
54236 - 112233 - 20220603 - 713102000 - 2022
54236 - 123 - CC2021 - 722607000 - 2022/04/04
54236 - KE2006336540 - KE1516608 - 713102
54236 - KE2006338078 - KE22728108 - 713102
54236 - KE2006334895 - KE2343549 - 7134070
54236 - KE2006336939 - KE40423170 - 713102
54236 - KE2006337064 - KE40515889 - 713102
54236 - KE2006337002 - KE40861707 - 715566
54236 - KE2006337821 - KE41289326 - 713102
54236 - KE2006336385 - KE41770406 - 713102
54236 - KE2006336755 - KE42042862 - 715566
54236 - KE2006338071 - KE42127931 - 713102
54236 - KE2006328211 - KE42136241 - 733505

Report Generator

Existing views have been modified

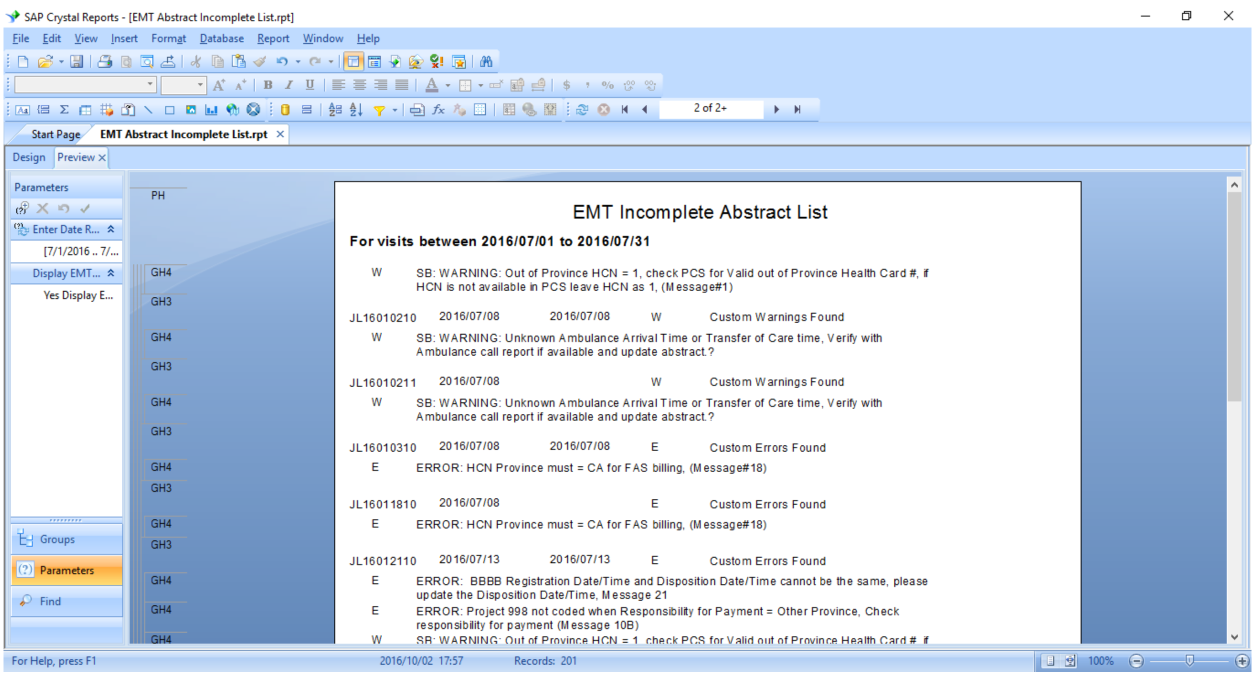
AbstractingErrorsWarnings_VR

Message Level: Custom Errors
Custom Warnings
Custom Information

I10 views

The 'Is Custom Validated' field has been added to all the I10 views.

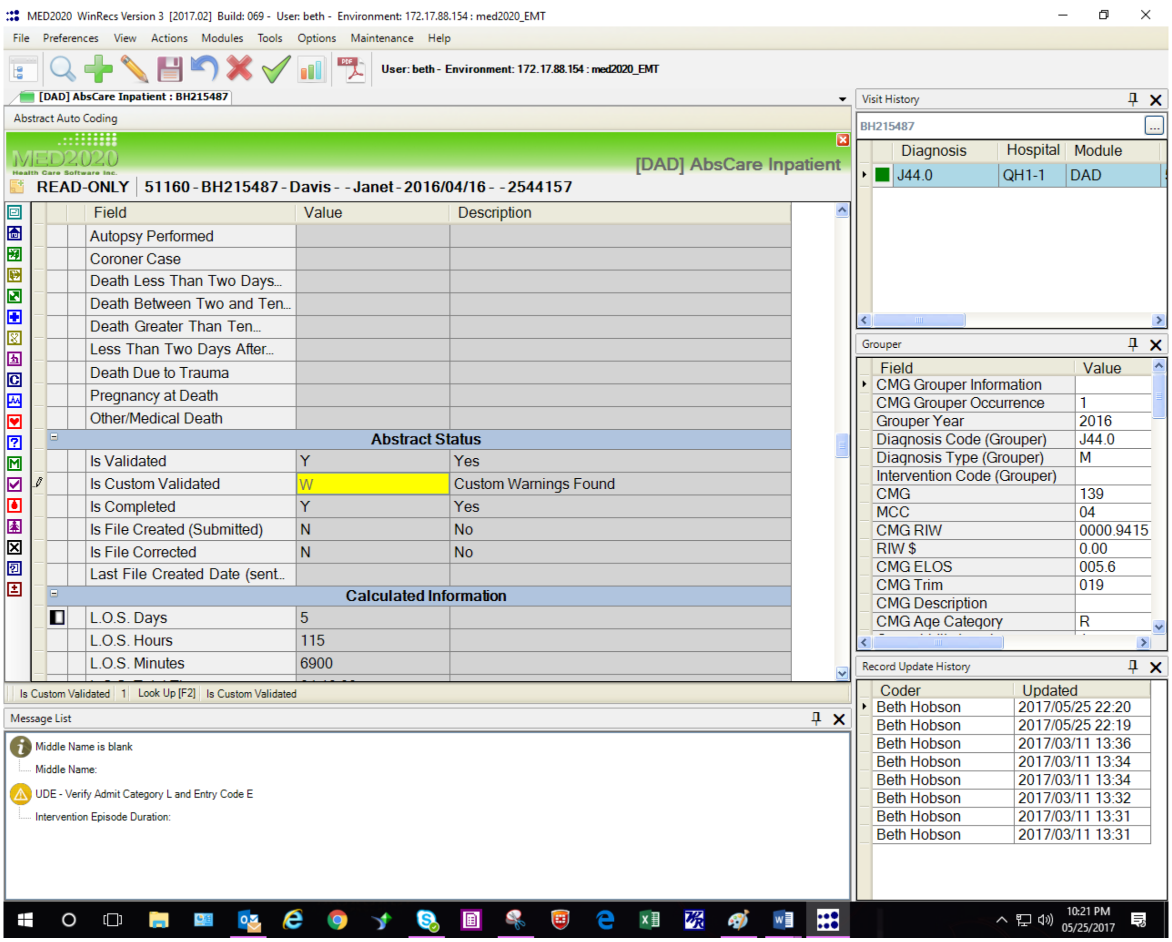
A report called EMT Incomplete Abstract List has been developed.



Access Visit and Verify Abstract

Amcare Abstract

Message should generate in message list box. If message does not generate upon load, F11 Verify.



Is Custom Validated field

In the abstract, there is a field called 'Is Custom Validated'. The Valid Values are:
Yes
When there are no EMT messages generated when abstract is verified, the field will populate a Y.

Custom Errors Found
When there are EMT messages that contain errors, the field will populate an E.

Custom Warnings Found
When there are EMT messages that contain warnings, the field will populate a W.

Custom Information Found
When there are EMT message that contains information, the field will populate an I.

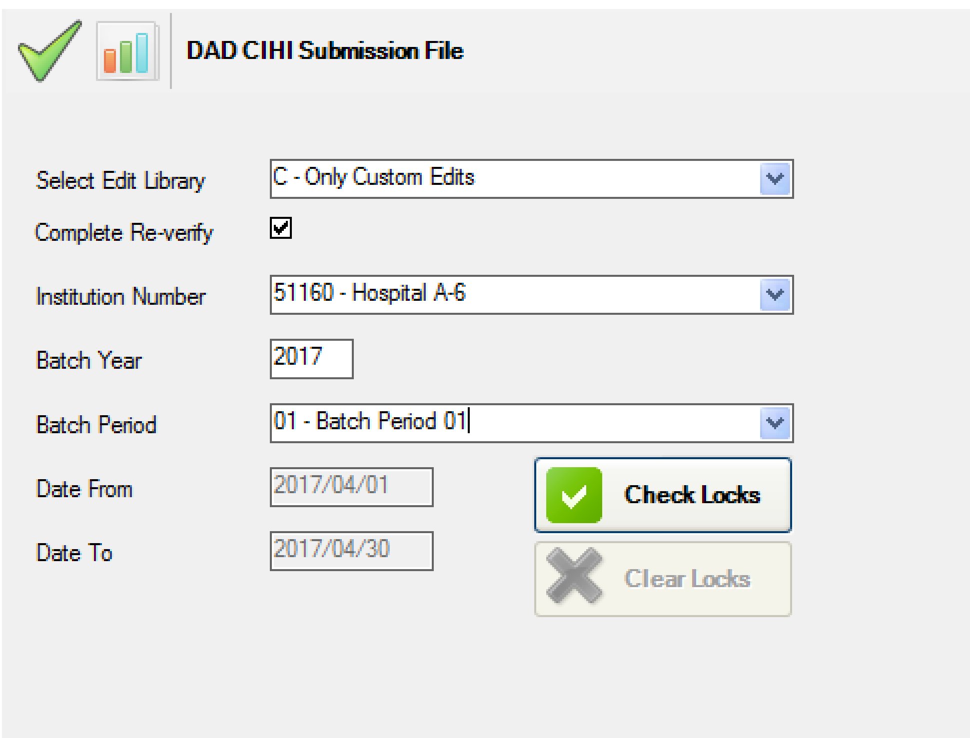
No
When EMT message are not yet verified in the abstract, this field will populate an N.

Abstract Status		
Is Validated	Y	Yes
Is Custom Validated	W	Custom Warnings Found
Is Completed	Y	Yes
Is File Created (Submitted)	N	No
Is File Corrected	N	No
Last File Created Date (sent..		
Calculated Information		
L.O.S. Days	5	
L.O.S. Hours	115	
L.O.S. Minutes	6900	

Batch Verify

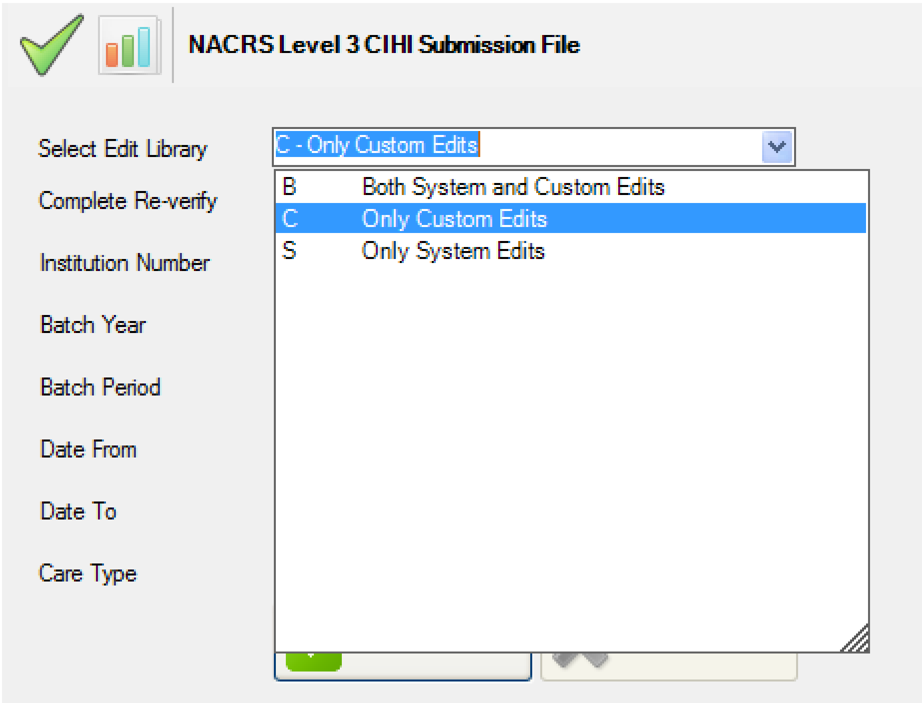
An option to verify all visits to see if EMT edits apply.

Tools>File Management>DAD>CIHI File Submission



Please Note: For Amare select Tools>File Management>NACRS Level 3>CIHI File Submission

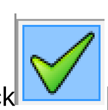
Select Edit Library

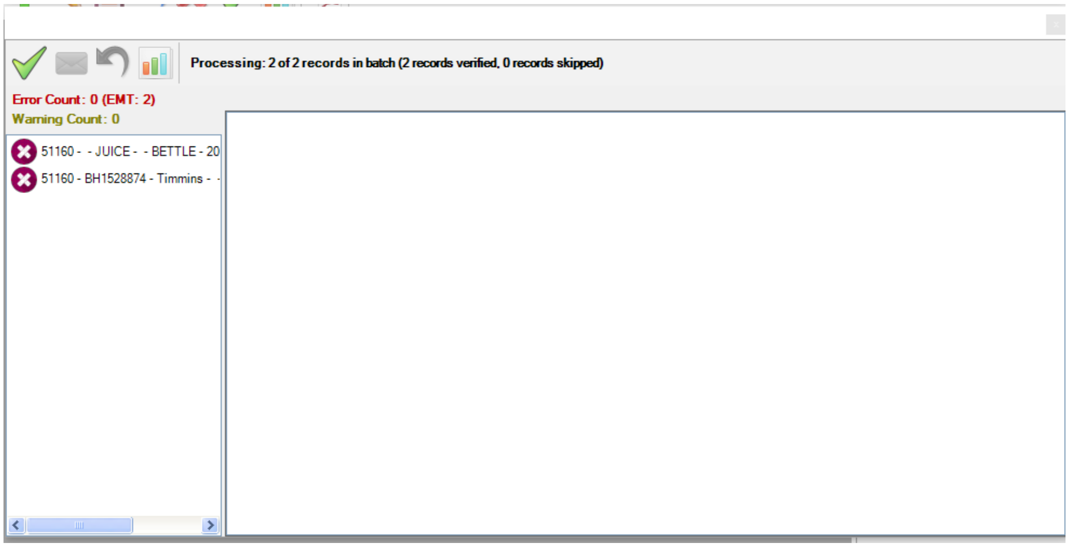


Both System and Custom Edits
This will perform the verify on the CIHI or provincial edits along with EMT edits at the same time.

Only Custom Edits
This will perform the verify on the EMT edits only.

Only System Edits
This will perform the verify on the CIHI and provincial edits only.

When click  [F11] Verify



Report Generator

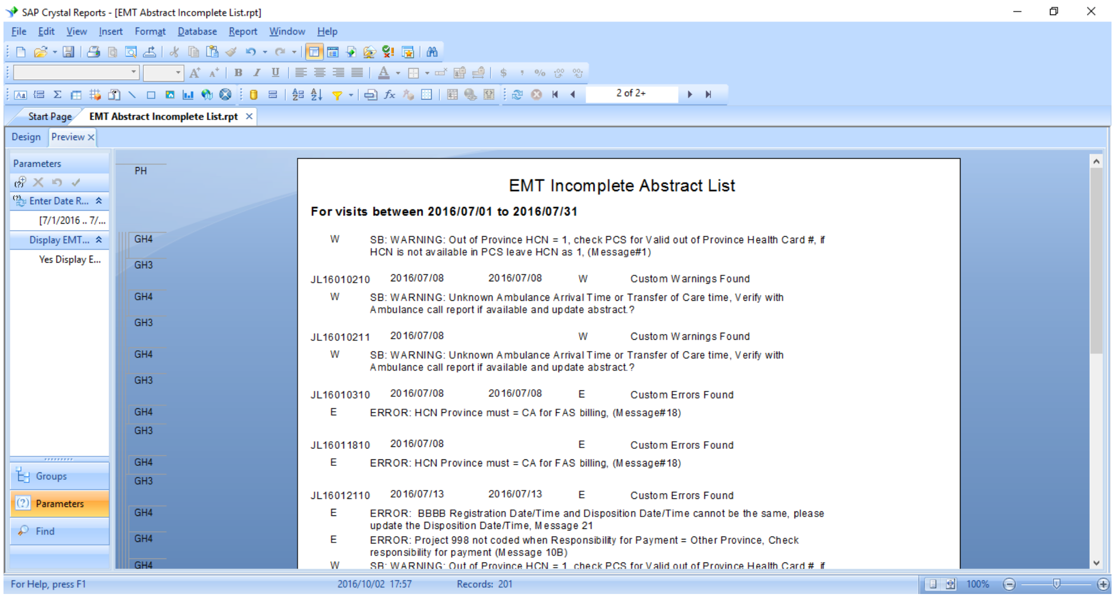
Existing views have been modified:

AbstractingErrorsWarnings_VR

Message Level:
    Custom Errors
        Custom Warnings
        Custom Information

I10 views - The ‘Is Custom Validated’ field has been added to all the I10 views.

A report called EMT Incomplete Abstract List has been developed.


SAP Crystal Reports - [EMT Abstract Incomplete List.rpt]
EMT Incomplete Abstract List
For visits between 2016/07/01 to 2016/07/31
W SB: WARNING: Out of Province HCN = 1, check PCS for Valid out of Province Health Card #, if HCN is not available in PCS leave HCN as 1, (Message#1)
JL16010210 2016/07/08 2016/07/08 W Custom Warnings Found
W SB: WARNING: Unknown Ambulance Arrival Time or Transfer of Care time, Verify with Ambulance call report if available and update abstract.?
JL16010211 2016/07/08 W Custom Warnings Found
W SB: WARNING: Unknown Ambulance Arrival Time or Transfer of Care time, Verify with Ambulance call report if available and update abstract.?
JL16010310 2016/07/08 2016/07/08 E Custom Errors Found
E ERROR: HCN Province must = CA for FAS billing, (Message#18)
JL16011810 2016/07/08 E Custom Errors Found
E ERROR: HCN Province must = CA for FAS billing, (Message#18)
JL16012110 2016/07/13 2016/07/13 E Custom Errors Found
E ERROR: BBBB Registration Date/Time and Disposition Date/Time cannot be the same, please update the Disposition Date/Time, Message 21
E ERROR: Project 998 not coded when Responsibility for Payment = Other Province, Check responsibility for payment (Message 10B)
For Help, press F1
2016/10/02 17:57
Records: 201

5. Using WinRecs

WinRecs uses common features throughout the application. This section will explain how to use these features.

5.1 Searching for a Record

The Search feature allows you to look for a record in WinRecs. Most facilities that have a batch or HL7 interface transferring records into WinRecs will use this to locate records.

The Record Search window

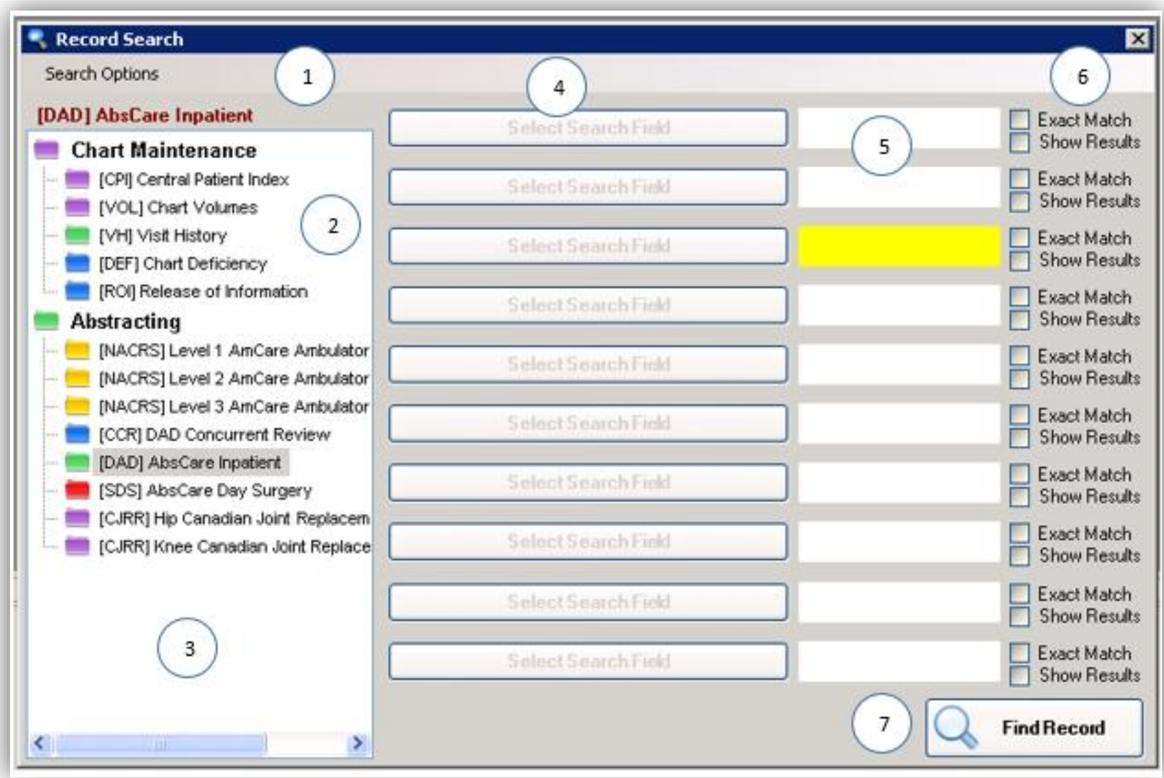


Figure 187 - Record Search Window

1. Search Options menu – Allows you to toggle to the “View Deleted Records” option.
2. Search module title – This displays the records types that will be searched. In our examples the **[DAD] AbsCare Inpatient** records will be searched.
3. Search module menu – This panel allows the user to select the module that will be searched.
4. Select Search Field – These ten (10) buttons allow the user to select which field(s) will be queried, e.g. “`Last name`”. These fields give you the ability to refine your search.
5. Search criteria textbox – In the textbox the user will enter the search criteria, e.g. “*Smith*”.
6. Field Search option – These checkboxes allow the user to tailor the search for each field selected. Details of these options are discussed in the section, Field Search Options

7. Find Record – When pressed, this button will start the search. If results are found they will be displayed in the **Search Result** window. If no records are found, the criteria textbox background will be displayed in red, indicating that no records were found.

To Search

- Press **[F4].**

  — or —

- Select the menu option **Actions** → **Find.**

  — or —

- Click the Search button on the toolbar .

Step 1 – Select the module on which you would like to perform the search.

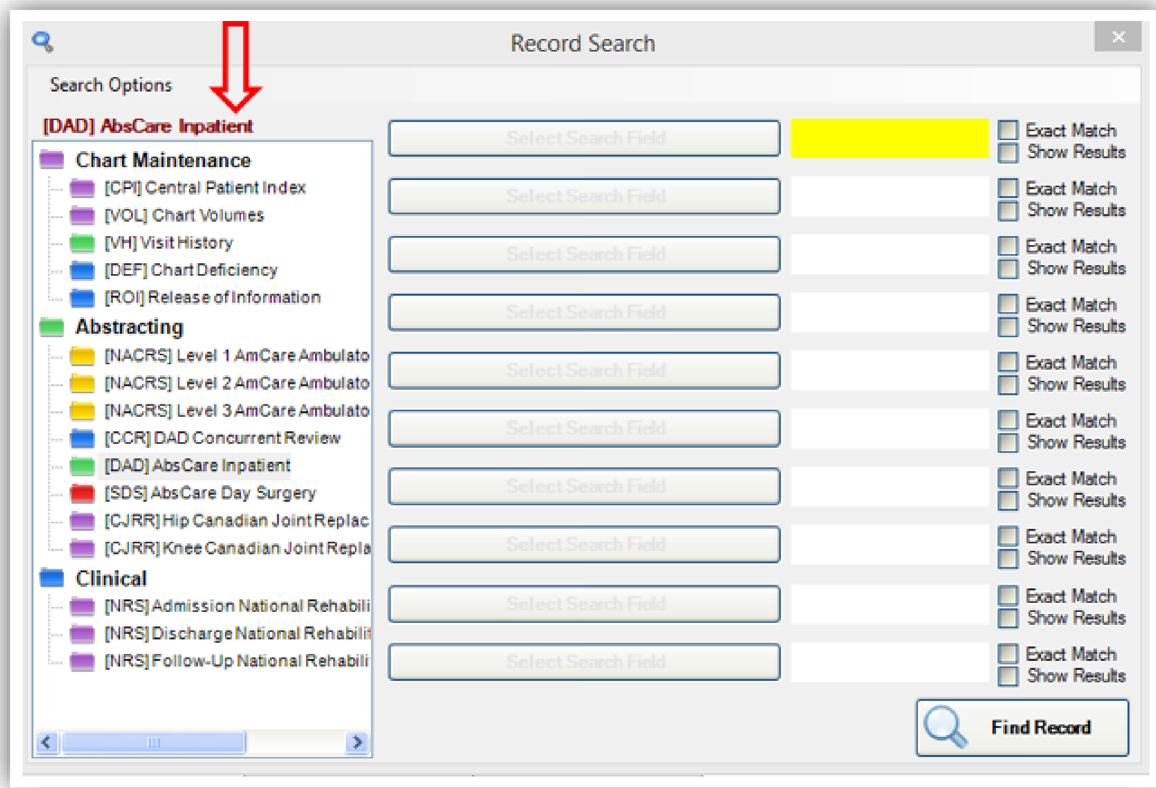


Figure 188 - Search Step 1

Step 2 – Click the Select Search Field.

Step 3 – Select the first field on which you would like to search.

To quickly move through the list you can type the first letter of the field name, e.g. to move near “`Last Name`”; type “`L`”. (Pressing a letter repeatedly will move you alphabetically through the choices beginning with that letter).

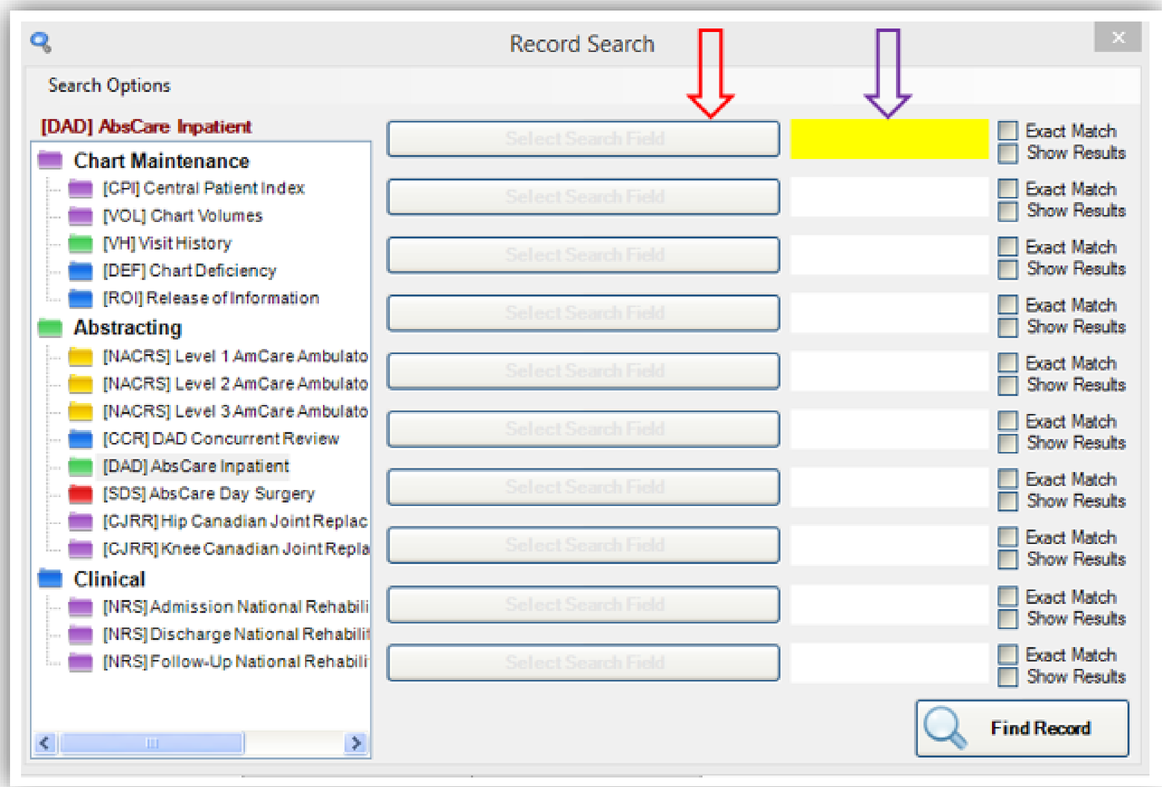


Figure 189 - Search Steps 2 & 3

When searching a date field only the year and the month entered will be used. E.g. searching “Date of Visit” with “2013/04/00” will yield all admissions from the month of April 2013. To locate a specific date, select the Exact Match checkbox which will then match on the day field as well as the year and month.

Good Practice – When searching for a birth date you should always use exact match.

Step 4 – Enter the criteria for your search and select your search option for this field.

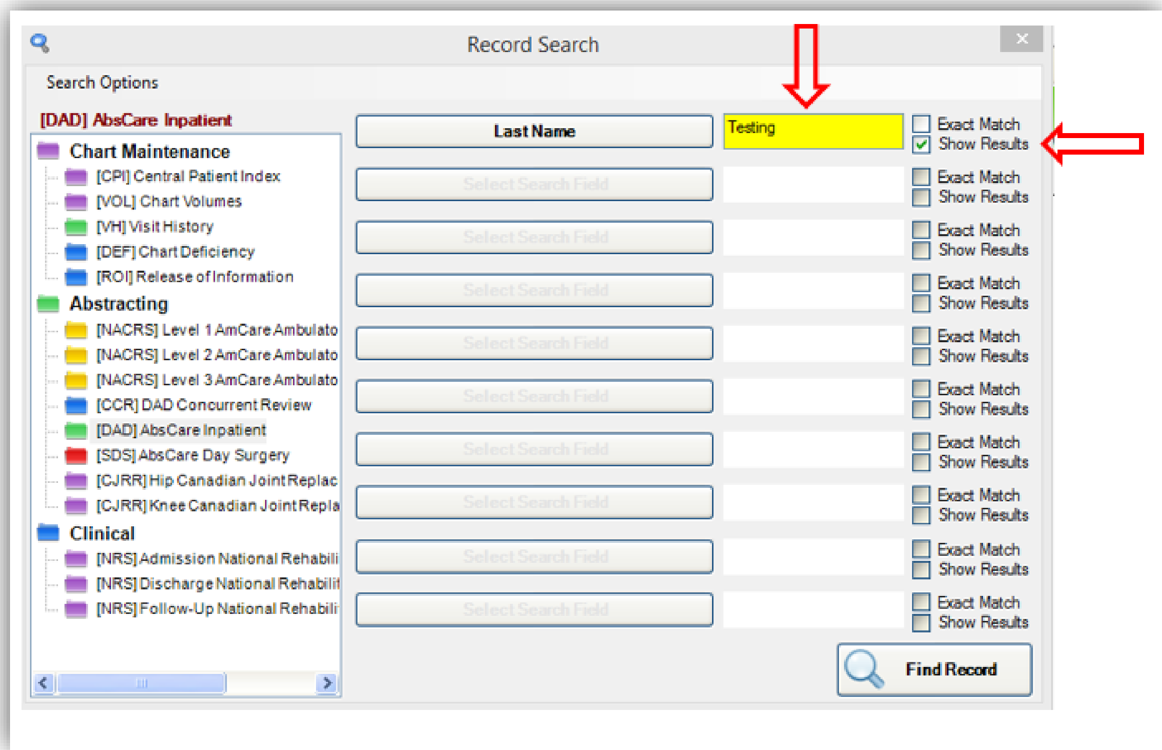


Figure 190 - Search Step 4

This example will search for all patients that have "*Testing*" in their last name.

The Search is interactive. When the Search window is open you cannot interact with any other portion of the application until the Search window is closed.

Field Search Options

Exact Match – When this check box is selected it will force the search to look for the exact value entered, excluding case sensitivity. "*Last*" and "*last*" will return the same result. This option should be used to restrain the size of the results list when the exact value is known, e.g. Chart Number.

A good use of exact match is looking for a specific chart number.

Show Results – When this check box is selected the field searched will be displayed in the Search Results window.

Search Results

The Search Results window will be displayed if records matching the criteria are found.

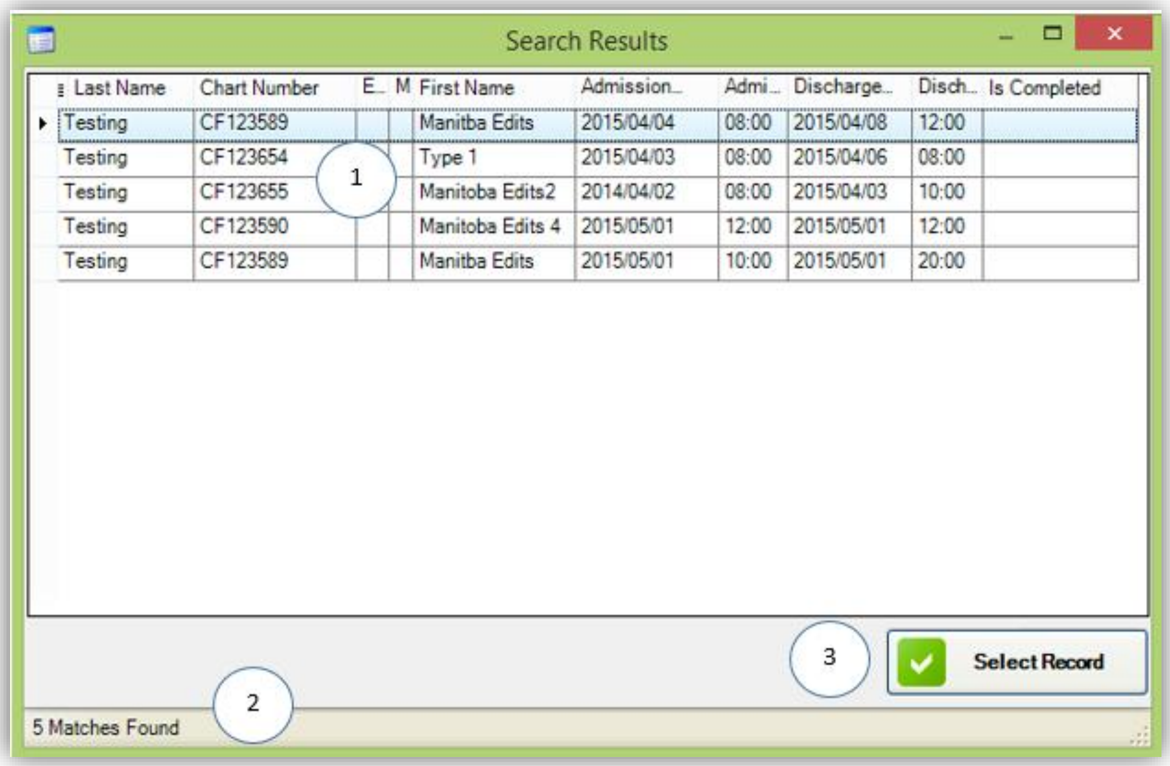


Figure 191 - Search Results

1. The grid displays the search results.
2. The records found indicator. In our example 5 records were found.
3. Select Record button – To select the desired record

   Double click the record you want to open.

   — or —

   a. Select the record you want to open.
   b. Click the **Select Record** button.

If too many records are found, refine your search by adding criteria.

The search result grid can be tailored as described in the section Grid Manipulation.

5.2 Creating a New Record

Creating a new record in a module will create a module specific record, but the steps to create a new record in the WinRecs modules are common to all of them. This section will describe the steps to create a new record in the WinRecs modules. CPI MODULE will be used as the example; the steps are similar for the abstracting modules. The difference between CPI MODULE and the abstracting modules will also be depicted.

To create a new record not in the CPI MODULE

- Press **[F5].**

  — or —

- Select the menu option **Actions** → **New.**

  — or —

- Click the New button on the toolbar .

To select the module in which the new record will be created

If no module is selected the Select module window will be displayed; select the module in which you would like to create the new record.

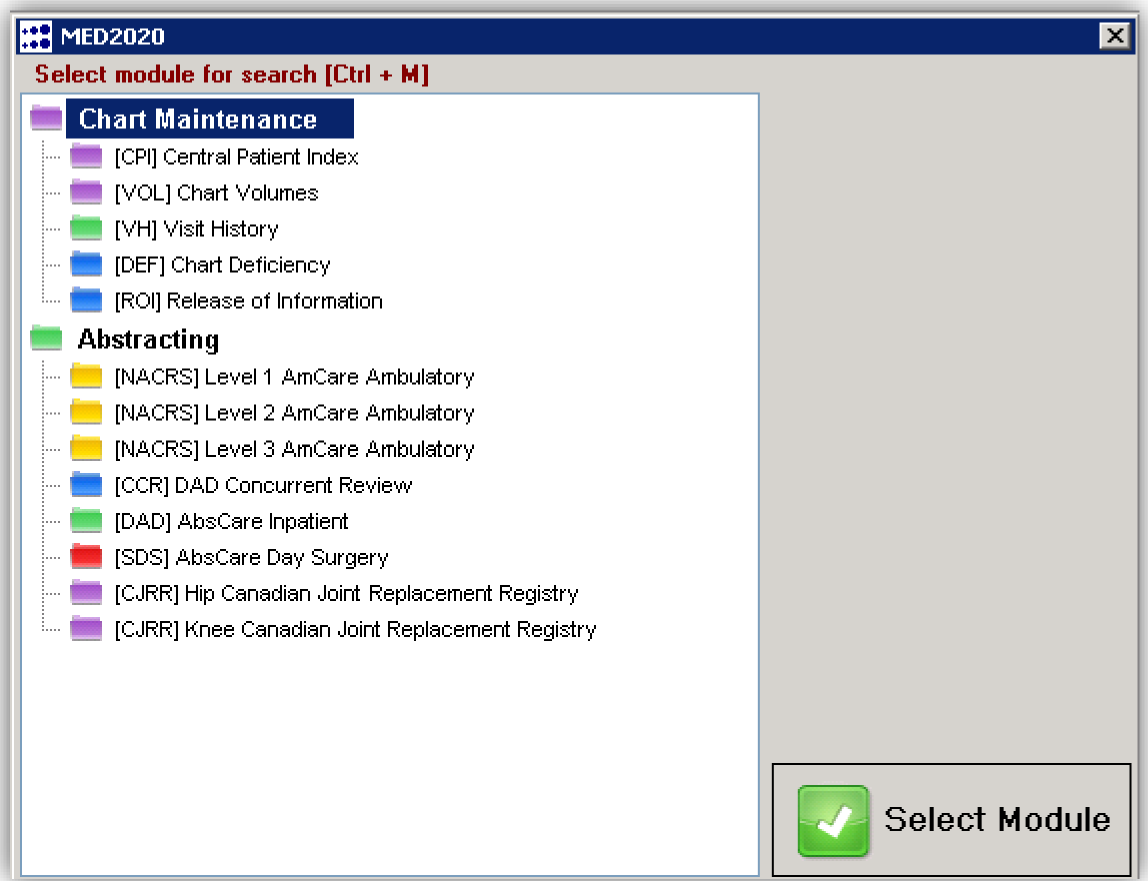


Figure 192 - Select Module

If the CPI MODULE module is selected, a new CPI MODULE record is created and the focus is automatically placed on the first field where data can be entered.

If an abstracting module is selected and the patient is not in the CPI MODULE:

A record search window will pop up, enter the chart number, patient name or whatever you are searching by:

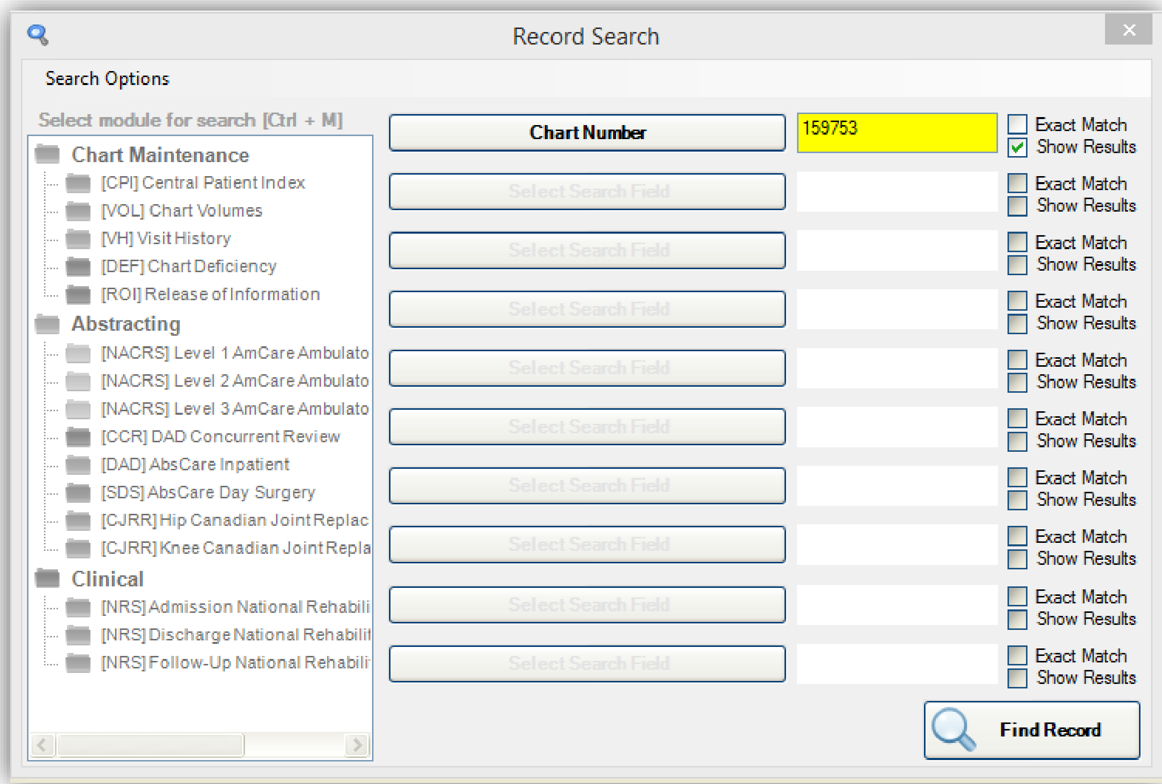


Figure 193 – Record Search Window

- Press **Find Record** or press **Enter**
- WinRecs will search for the chart number in the **CPI MODULE**, if the chart number has never been entered into WinRecs the following will happen:

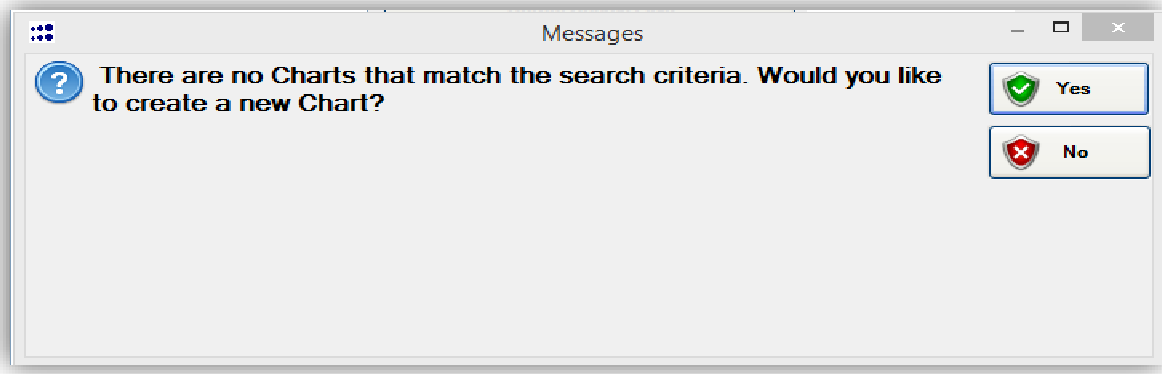


Figure 194 – Create a new chart message

- Pressing **No**, will take you back to the search record screen
- Pressing **Yes**, will take you to the CPI MODULE to create the record. The `Chart Number` field will populate with the new chart number entered on the search screen.

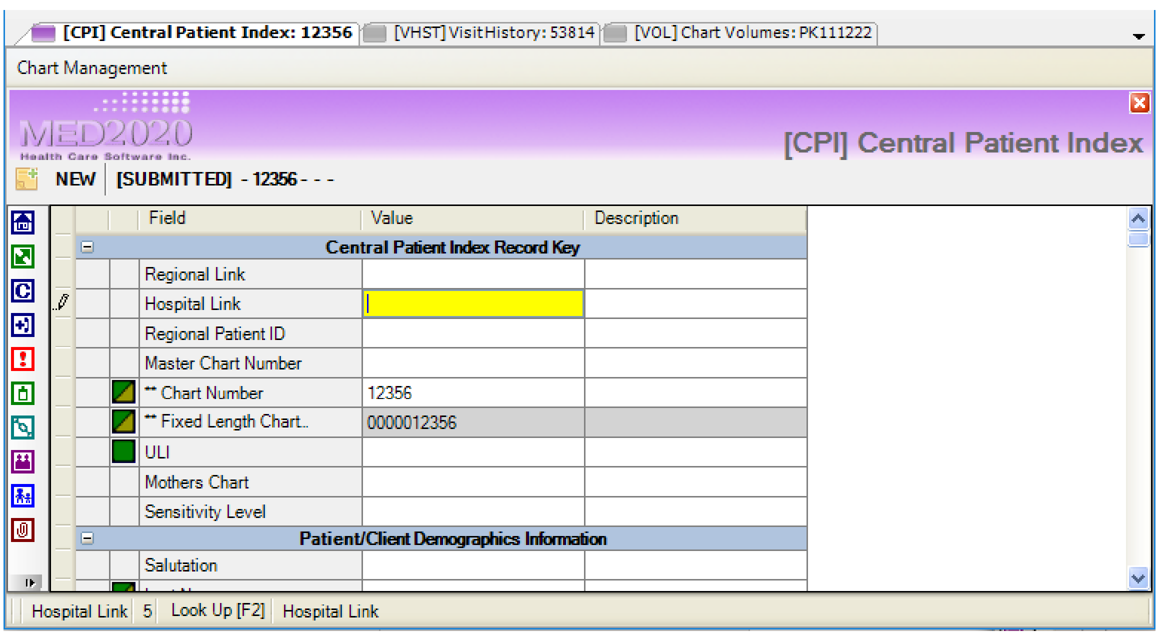


Figure 195 – Create New Chart in CPI MODULE

- Enter the following fields `Last Name`, `First Name`, `Birth Date` and `Gender` in the CPI MODULE and any other fields required.
- Press **F6/F7.**

- Click on the **[DAD] AbsCare Inpatient** tab

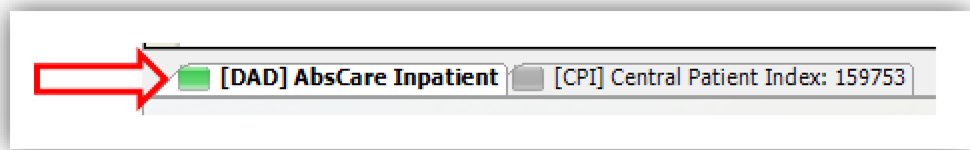


Figure 196 – [DAD] AbsCare Inpatient

- Press **[F5]**

  — or —
- Select the menu option **Actions** → **New.**

  — or —
- Click the New button on the toolbar 
- The information you had entered should populate in this case the chart number:

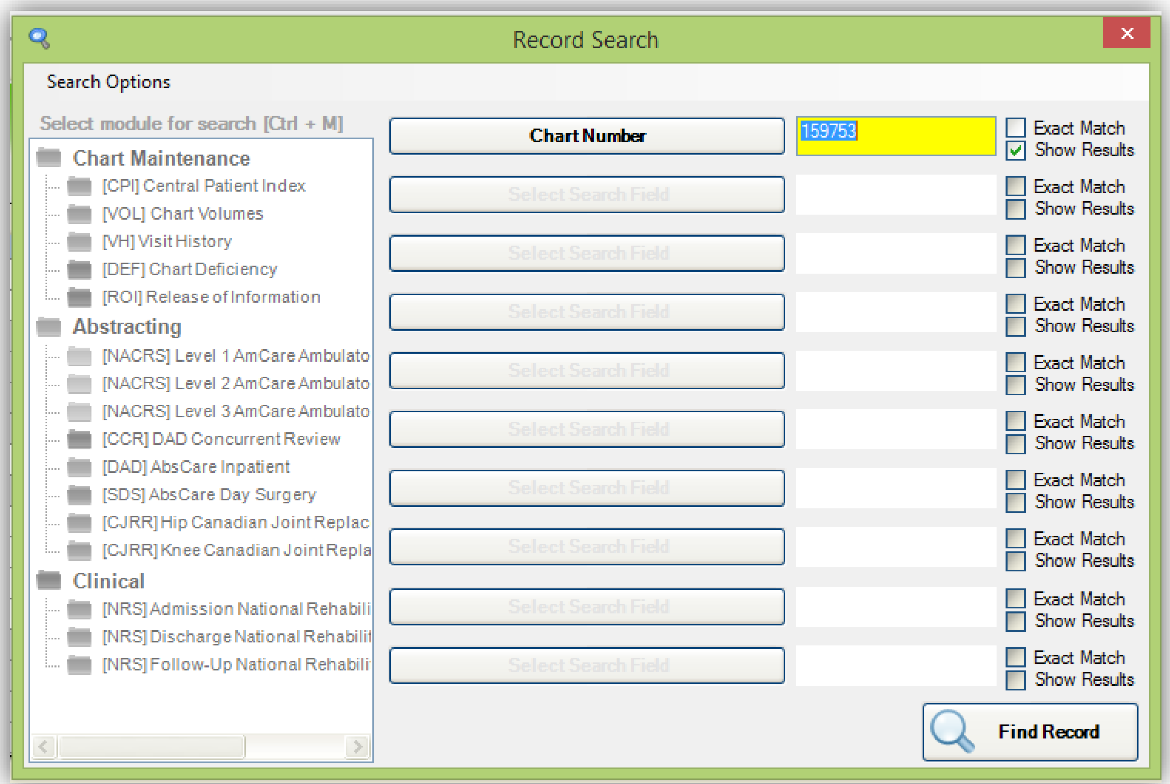


Figure 197 – Record Search Window

- Press **Find Record** and the **Search Results** screen will appear.

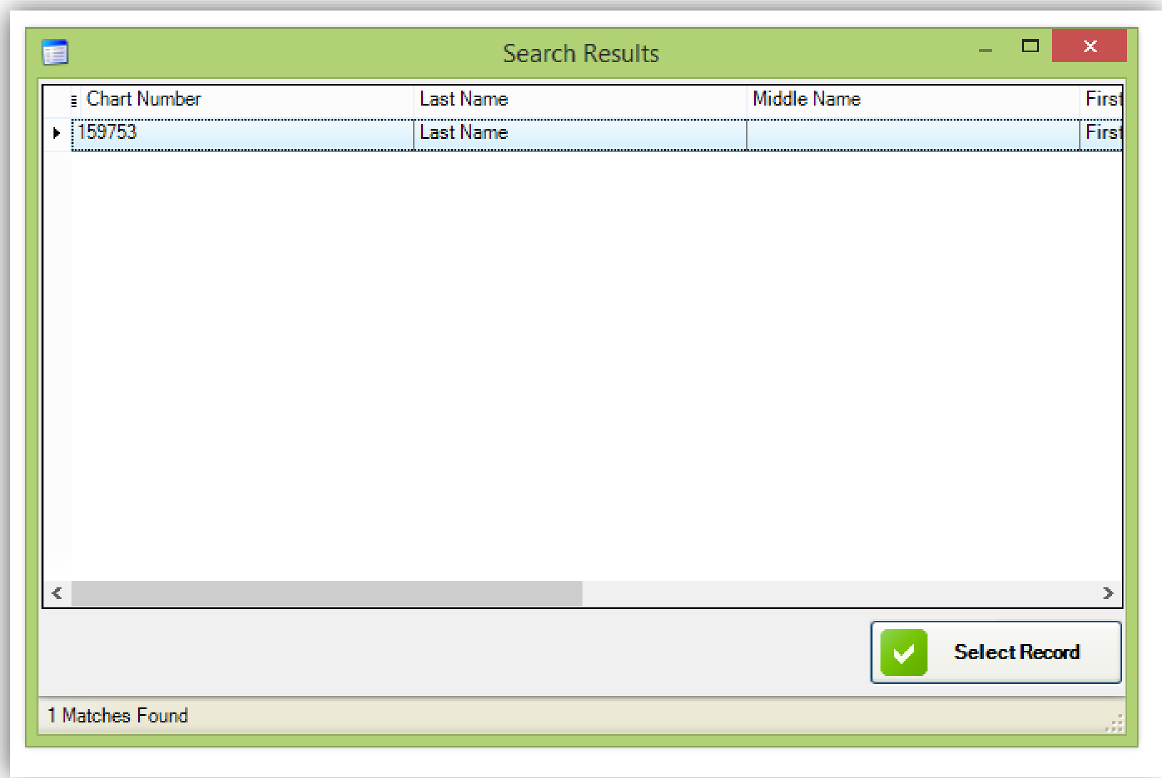


Figure 198 – Create new record selection

To select the desired record:

- Double click the record you want to open.

  — or —

- Select the record you want to open and click the **Select Record** button
- A new record will display a status of “New” in the header.

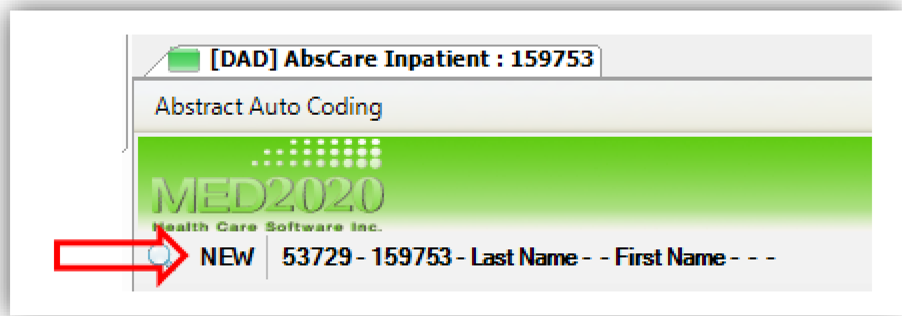


Figure 199 - Record in New Module

The information entered in the CPI MODULE and any default information will populate the record. Enter the abstract as per your usual data collection as per your Hospital Policy and CIHI guidelines.

When saving the abstract, please ensure the key fields are entered into the Abstract, they include Institution Number, Discharge Date and Discharge Time (for DAD) and Registration Date & Time (NACRS). If any of these three fields are not entered, a critical message will occur and the record will not be saved.

The feature of creating a new record should not happen often as an abstract will be brought over by your HL7 or Batch Interface.

Create a new abstract already in the CPI MODULE

- Press **[F5].**

  — or —

- Select the menu option **Actions** → **New.**

  — or —

- Click the New button on the toolbar 

A record search window will pop up, enter the chart number:

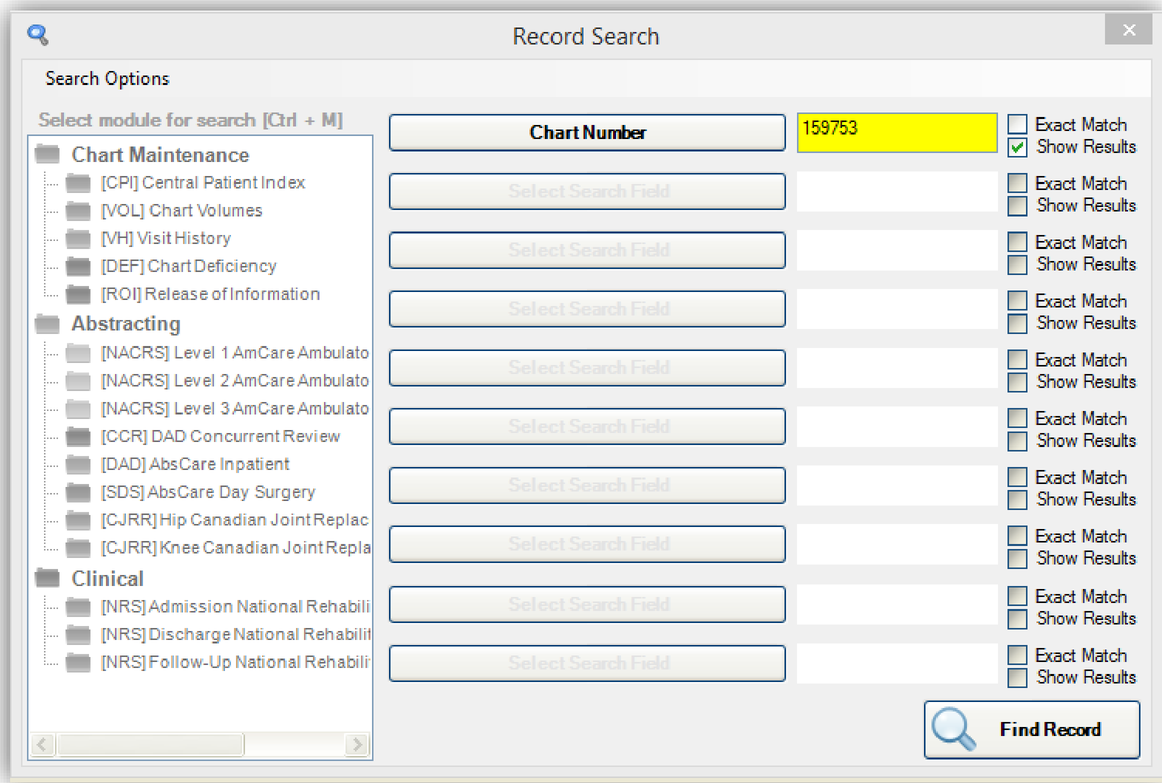


Figure 200 - Create New Abstract Search Window

WinRecs will search for the chart number in the **CPI MODULE**, if the chart number has been entered into WinRecs the following will happen

- Press **Find Record.**

  — or —

- Press enter**.**

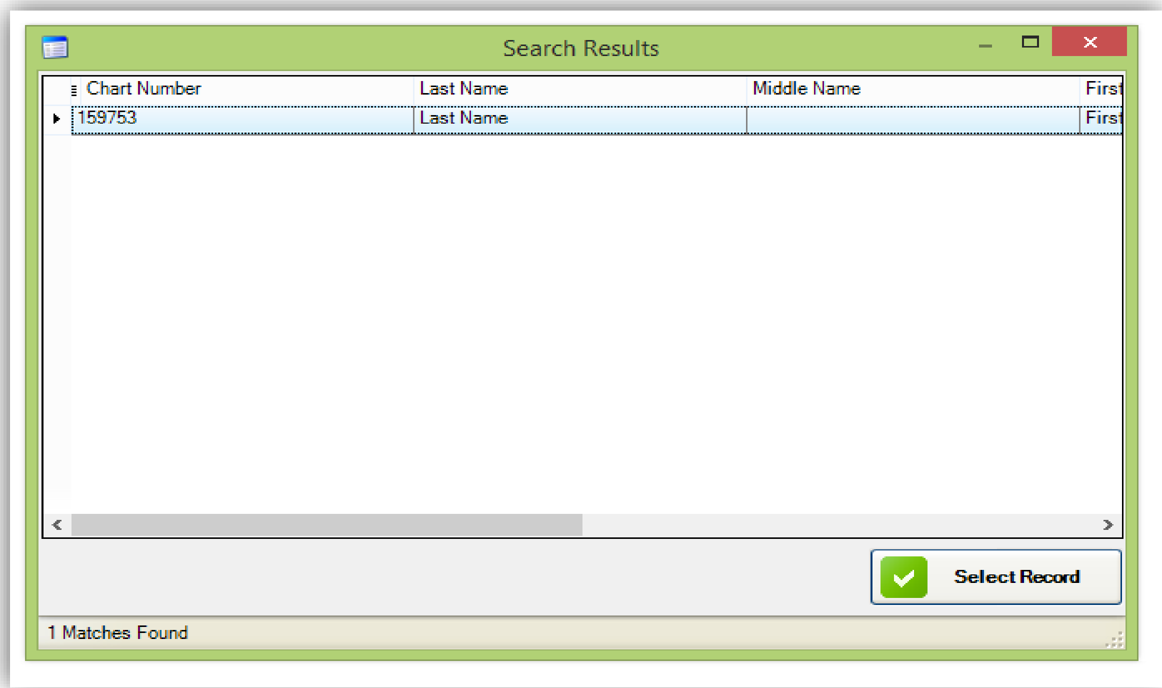


Figure 201 – Create New Abstract Search Results

- To select the desired record:
  - Double click the record you want to open.

    — or —
  - Select the record you want to open and click the **Select Record** button
- A new record will display a status of **“New**” in the header.

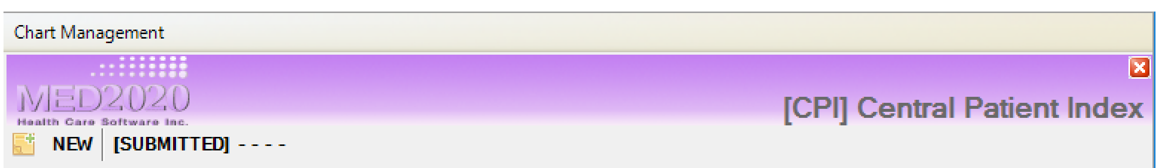


Figure 202 - Record in New Module

The information entered in the CPI MODULE and any default information will populate the record. Enter the abstract as per your usual data collection as per your Hospital Policy and CIHI guidelines.

5.3 Editing an Existing Record

A record will always open in **READ-ONLY** mode, you can enter information in **Read-Only** mode, but will need to put the record into **Edit** mode to save the record.

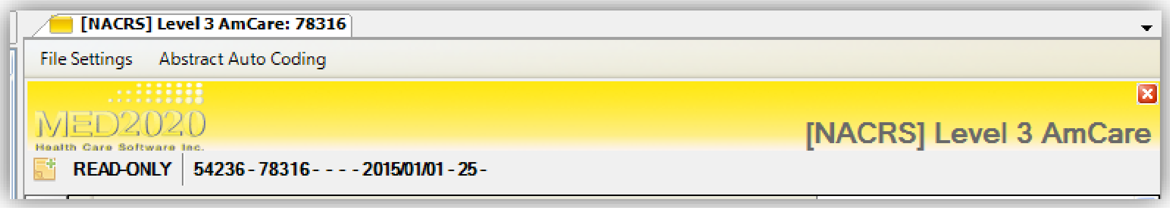


Figure 203 - Record in Read-Only mode

In order to save the modification of a **Read-Only** record you must set it to **Edit** mode.

To edit a read-only record

- Press **[F6].**

  — or —

- Select the menu option **Actions** → **Edit.**

  — or —

- Click the Edit button on the toolbar  .

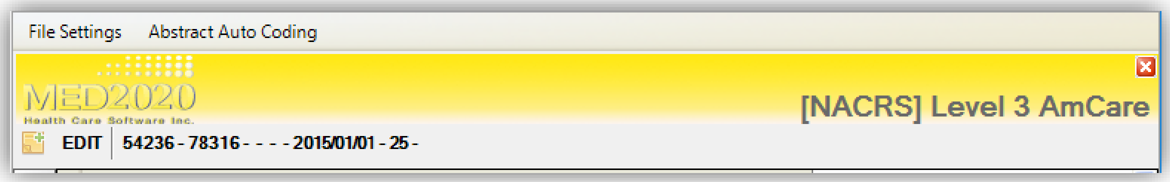


Figure 204 - Record in edit mode

Once the record it saved, it will revert back to Read-Only.

You can enter data in the READ ONLY mode, when you are ready to save it is suggested to press Edit then Save (F6/F7).

When you make changes to a record and Save **[F7]** in 'Read-Only' mode will result in the following question prompt:

Figure 205 – Message when chart is in Read-Only Mode

- Click **Yes** to save the record.
- Click **No** to discard the changes.

  — or —
- Highlight **Yes** using the **[TAB]** key, then press **[ENTER]** to save the record.
- Highlight **No** using the **[TAB]** key, then press **[ENTER]** to discard the changes.

5.4 Adding Notes to the Abstract

To make notes to an abstract the following icon will display when the abstract is open:

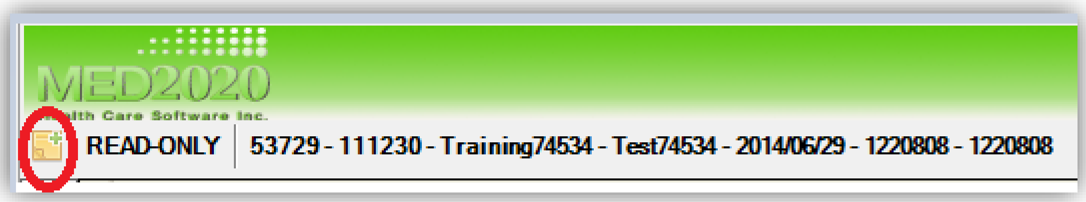
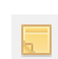


Figure 206 – Notes Icon

- When there are no notes for the record the icon will have a Plus sign. 
- When there are notes for the record the icon will have no Plus sign. 

Notes Window

- Open an abstract in any module

- Select the Module Notes or use the shortcut key to access the notes window is **[Alt + F3]** and the Notes Window will open.

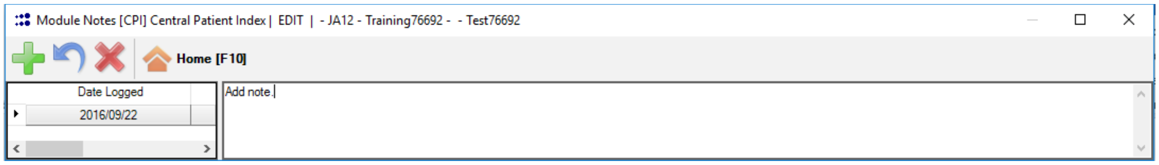
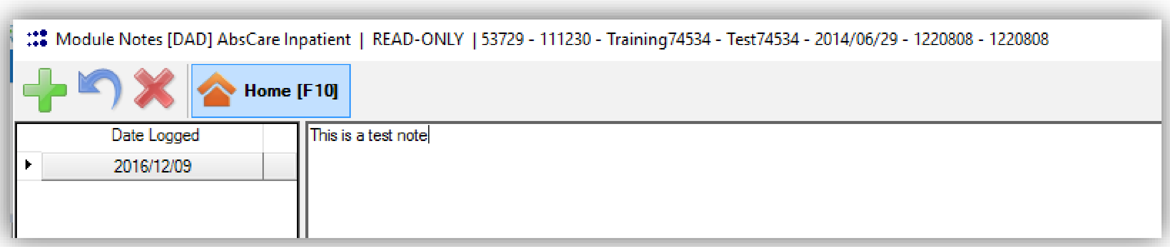


Figure 207 – Notes Window

- The Notes Window has a toolbar with the following icons:
  - to create a new note **[F5],**
  - undo changes **[F8],**
  - delete changes **[F9]**
  - to return the home page **[F10].**
- There is a Date Logged panel which displays the list of dates which notes were logged.
- When selecting a date, the note entered will populate on the screen, by default the last note will be populated.

To create a note:

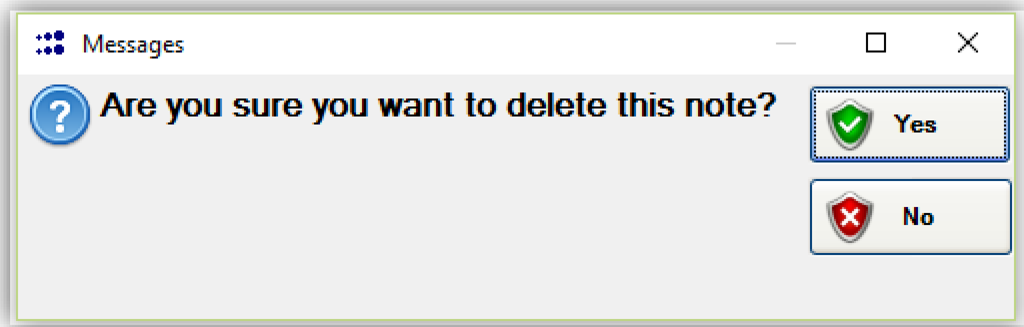
- Press the or **[F5]**
- The date, time and coder who logged the note will populate.
- Click on the second column and type your note



- Press  to go back to the screen and your note is saved

To delete a note:

- With an abstract open click on the note icon 
- Highlight the Date Logged (there can be more than one date, highlight the one to be deleted)
- Press  or **[F9]**
- A message will display



- Click Yes to delete or Click No to not delete.

5.5 Verifying a Record

Before saving a record, the user should always verify the data that has been entered. The result of the verification will be displayed in the **Message List** window. The error messages are displayed as the data is entered and removed as the errors are corrected. In some instances, some messages are related to multiple fields; modifying one field may modify the message of the other field.

- Press **[F11].**

  — or —

- Select the menu option **Actions** → **Verify.**

  — or —

- Click the Verify button on the toolbar .

When a record is verified the messages or edits for the record will be displayed in the Message List.

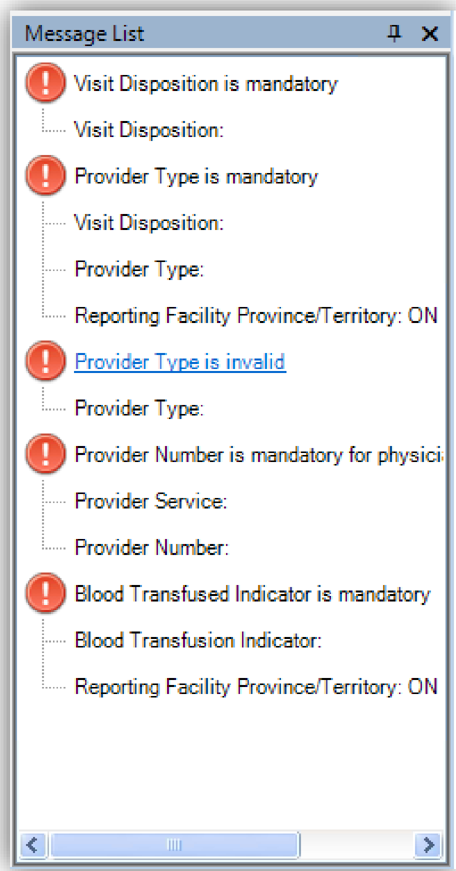


Figure 208 - Message List showing verification results

5.6 Saving a Record

New or modified records should be saved before closing the window in which the record is displayed. To save a new or modified record:

- Press **[F7].**

  — or —

- Select the menu option **Actions** → **Save.**

  — or —

- Click the Save button on the toolbar .

When a user tries to close a new or modified record before saving it, WinRecs will display a message asking the user to save or discard the changes. The message box will be as follows.

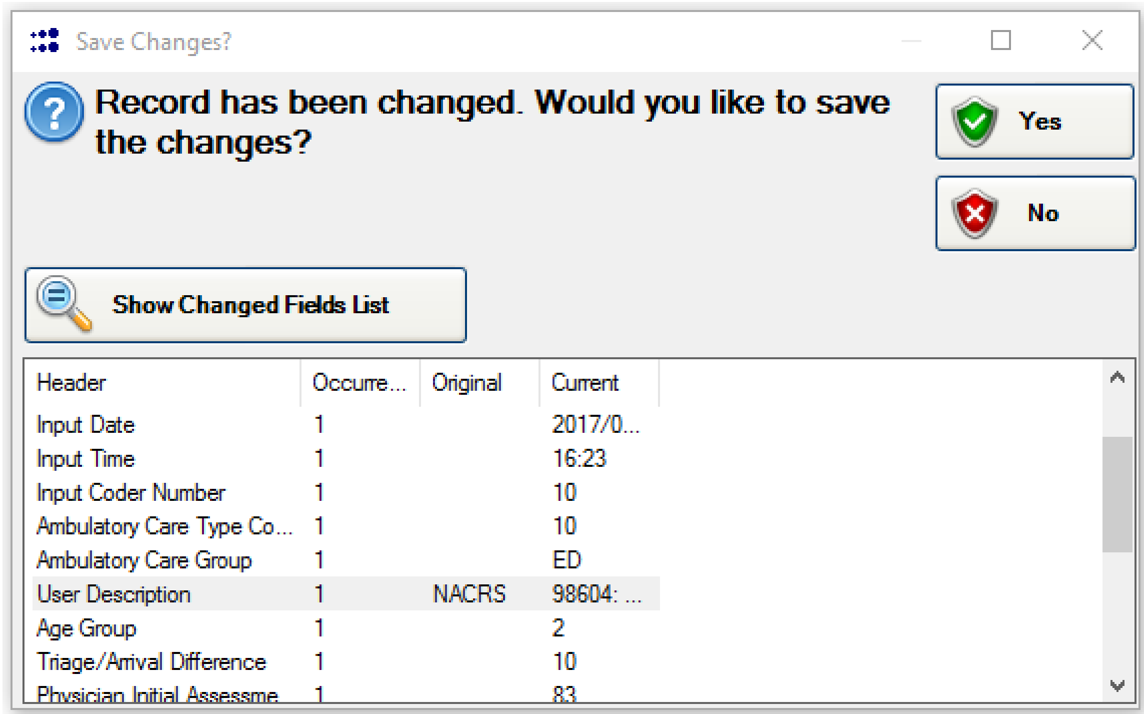


Figure 209 - Saving a Record

- Click **Yes** to save the record.
- Click **No** to discard the changes.

  — or —

- Highlight **Yes** using the **[TAB]** key, then press **[ENTER]** to save the record.
- Highlight **No** using the **[TAB]** key, then press **[ENTER]** to discard the changes.

- Click the “Show Changed Fields List” button to display all fields that have been changed.

5.7 Undoing a Record

In some instances, changes may need to be undone. In this case, you can undo all the changes done since the last time the record was saved or since the record was opened. To undo changes:

- Press **[F8].**

  — or —

- Select the menu option **Actions** → **Undo.**

  — or —

- Click the Undo button on the toolbar  .

After activating the Undo feature the system will prompt you to confirm the action.

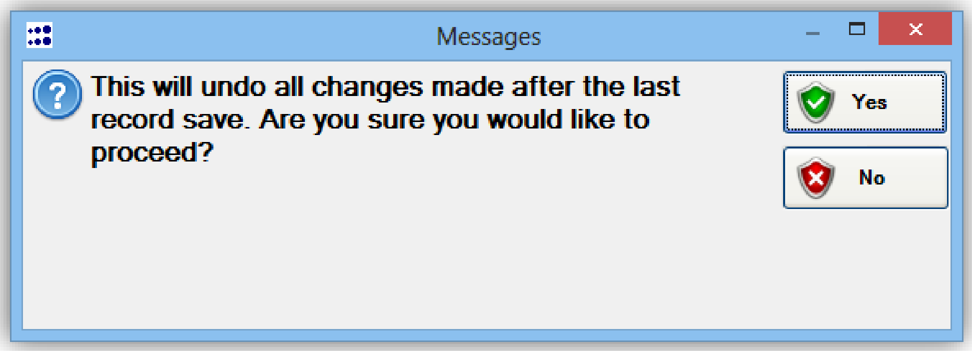


Figure 210 - Undo confirmation

All unsaved changes will be lost after confirming the undo action.

- Click **Yes** to undo the changes.
- Click **No** to keep the modified data.

  — or —

- Highlight **Yes** using the **[TAB]** key, then press **[ENTER]** to undo the changes.
- Highlight **No** using the **[TAB]** key, then press **[ENTER]** to keep the modified data.

5.8 Deleting a Record

This function deletes the entire abstract, occurrence or item in the module the program is focused on. If the entire abstract or CPI MODULE entry is deleted it will be stored in the Purge module until it is completely purged from the system. To delete a record:

- Press **[F9].**

  — or —
- Select the menu option **Actions** → **Delete.**

  — or —
- Click the Delete button on the toolbar  .

After selecting the Delete action, the system will generate a prompt to confirm the action.

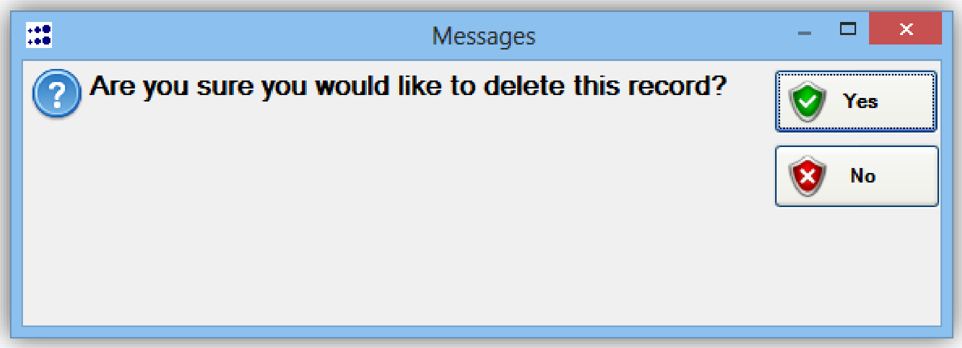


Figure 211 - Deletion confirmation

> **Deleted abstracts or CPI entries are moved to the purge module and will show up on reports as they are still in the database. Users will need to create a Purge procedure with the deletions to ensure reports are accurate. See PURGE/RECOVER**

- Click **Yes** to delete the record.
- Click **No** to keep the record.

  — or —
- Highlight **Yes** using the **[TAB]** key, then press **[ENTER]** to delete the record.
- Highlight **No** using the **[TAB]** key, then press **[ENTER]** to keep the record.

> **Deleted records are moved to the purge module and are only removed from the system if a purge is performed.**

5.9 Message List Window

The Message List window is used to display warnings, errors and information.

The following statements may be seen in the Message List window.

	Critical: displays when there's a critical error on a specific field. The record will not be saved and submission will fail.
	Error: displays when there's an error on a specific field. The record will be saved, but submission will fail.
	Warning: displays when there's a warning on a specific field. The record will be saved and submitted.
	Exception: displays when an exception occurred on a field.
	Question: displays when a question requires an answer from the user.
	Information: displays when more information is available for the user.

Table 13 - Message List Icons with Descriptions

An example of the Message List window showing various types of warnings and errors is as follows:

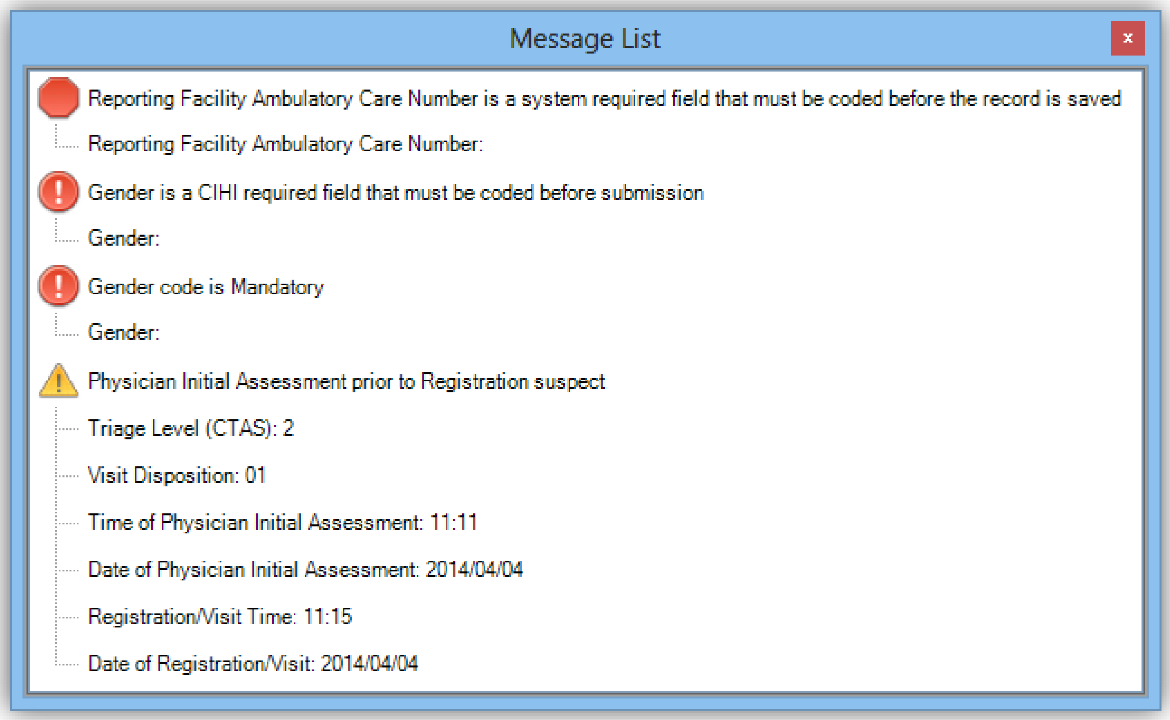


Figure 212 - Message List example

Clicking a specific field in a message will automatically set the focus of the application to that field. For example, clicking on `Gender` will set the focus of the application on the Gender field in the abstract, allowing you to select a gender. If the field with the error is part of a multi-form the multi-form will be opened.

The icon can be clicked to collapse a specific message. The message will still be displayed but the field details will no longer be visible.

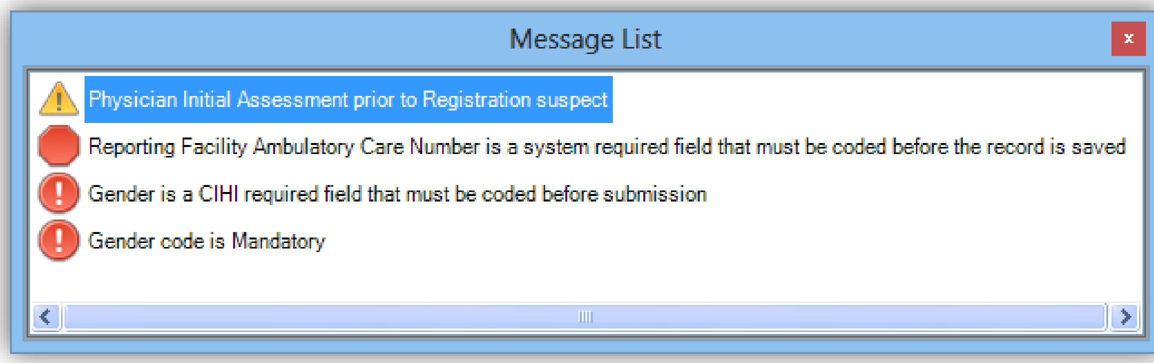


Figure 213 - Message List example with messages collapsed

5.10 Patient Visit History

The Patient Visit History displays abstracted and non-abstracted visits.

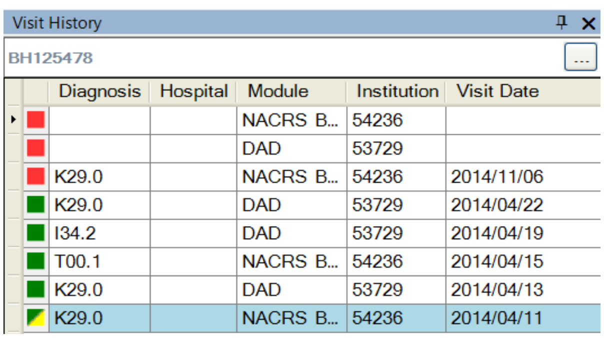
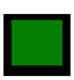
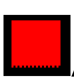
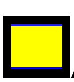


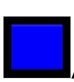
Figure 214 – Patient Visit History

The color graphic represents the status of the abstract in the visit history as follows:

 Abstract is saved and complete

Abstract is saved with errors

Abstract is saved with warnings

Abstract is not complete and has not been saved

5.11 WinRecs Navigation

Moving from fields to fields can be done by:

- Pressing [ENTER] – to move to the next field

  — or —

- Click on the desired field

  — or —

- Using the keyboard arrows to move up or down

Field background description

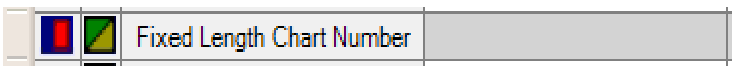
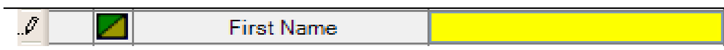
	Read-only field
	Edited field

Table 14 - Field Background Description

Footer

The footer displays information about the currently selected field on the field grid.

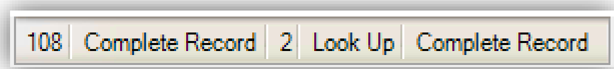


Figure 215 - Module footer

The following information's are displayed in the footer:

108	CIHI Field ID – this field displays the identification number of the CIHI field
Complete Record	User defined description – same as on the grid.
2	Field length – this is the maximum length of the field
Look Up	Field type – this is the type of field. The possible values are look up, date, time, numeric or text. Each field type will dictate the information you are allowed to enter in the field. The format are described below in Table 15 - Footer Field Information Field type format
Complete Record	CIHI Field description – this field displays the description of the CIHI field

Table 15 - Footer Field Information

Field type format

The field types determine the formats and valid values that can be entered in the field.

Look up	This type of field only accepts values for a redefined list. E.g. the Gender field can only accept the values F, M, O, or U. To view or select the value from the list of valid values press **[F2]**
Date	This type of field only accepts date values. The format is YYYY/MM/DD
Time	This type of field only accepts time values. The format is HH:MM
Numeric	This type of field only accepts numeric values; 0-9.
Text	This type of field only accepts text values. A-z, A-Z. 0-9

Table 16 - Field Type Format

Group Field List

The group field list allows the user to quickly navigate through the list of fields of a record. When a group is expanded the list of fields for that group will be displayed.

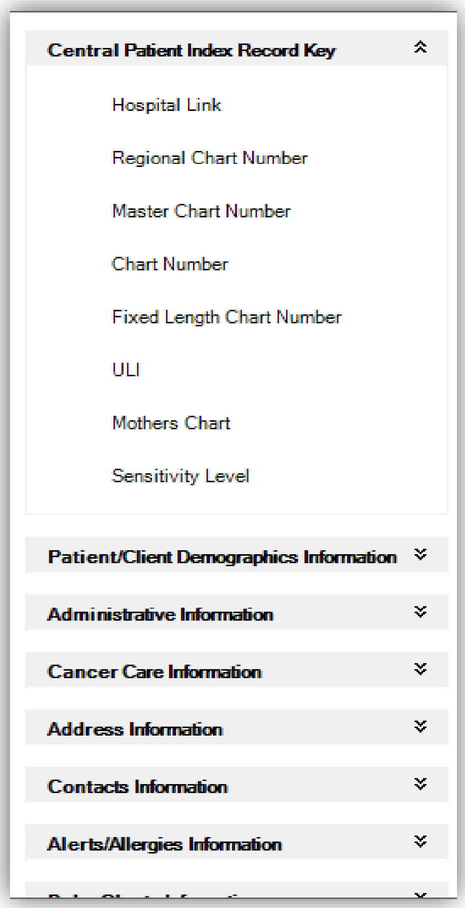


Figure 216 - Group field list

Expanding/Collapsing a group

- To expand a group click

  — or —

- To collapse a group click

To select a field in a group

Selecting a field in a group will navigate to that field in the grid.

- Expand the desired group by click the
- Click the desired field in the group.

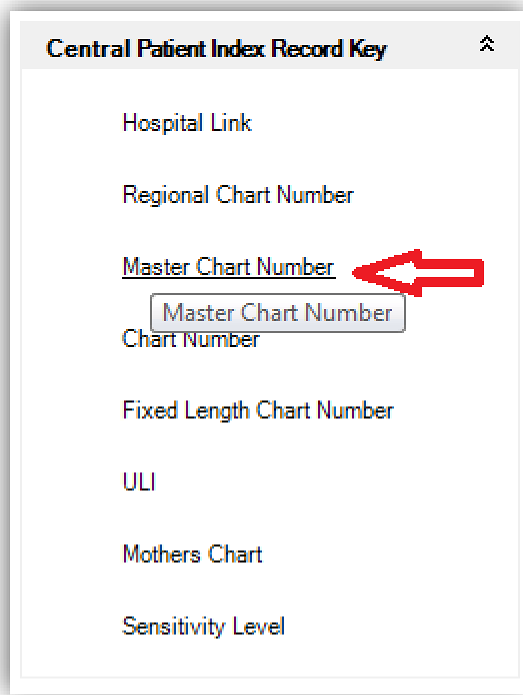


Figure 217 - Group field list selection

Selecting a field that is part of a multi-form will open the multi-form window.

Fields grid parts

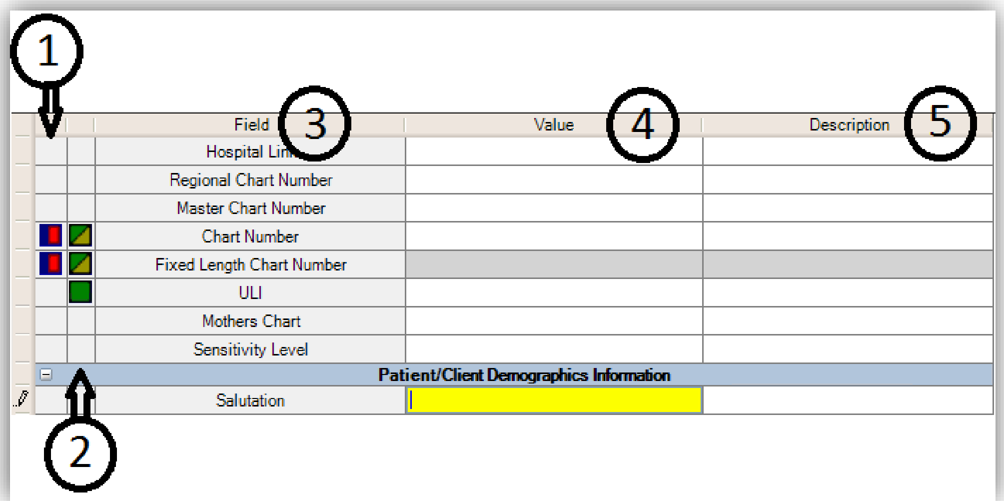


Figure 218 - Fields grid parts

1. **Required fields** – system mandatory fields each symbol has a different meaning.

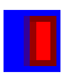
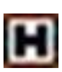
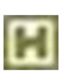
	System Required: WinRecs required field. Must have data entered to save.
	CIHI Required: Mandatory data element for submission to CIHI.
	CIHI Submitted: Data entered in field submitted to CIHI.
	Provincial or Module Required. Mandatory data element for Provincial or Module
	Hospital Required: Required field. Must have data entered to save.
	Hospital Error: Mandatory data element for submission to CIHI.
	Hospital Warning: Hospital warning. Record will save and submit.

Table 17 - Entry Grid Icon Description

2. **Field usage** - Field usage icon meaning varies based on the module that is open. Here's the description of the icon by module.

CPI MODULE:

■	The valued is copied from CPI MODULE to DAD abstract
■	The valued is copied from CPI MODULE to NACRS abstract
◪	The valued is copied from CPI MODULE to both DAD and NACRS abstract

Table 18 - CPI MODULE Field Usage Icons

DAD:

■	This field is used for grouper
■	Not Used
◪	Not Used

Table 19 - DAD Field Usage Icons

NACRS:

■	This field is used for grouper
■	Not Used
◪	Not Used

Table 20 - NACRS Field Usage Icons

3. **Field** – This is name of the field that needs to be entered.
4. **Value** – This is where the value is entered.
5. **Description** – This is the description of the value.

Group fields section expand/collapse

Group field section can be expanded or collapsed. This will allow the user to view more of a specific section.

To collapse a group field section

- Click the icon to collapse the section header

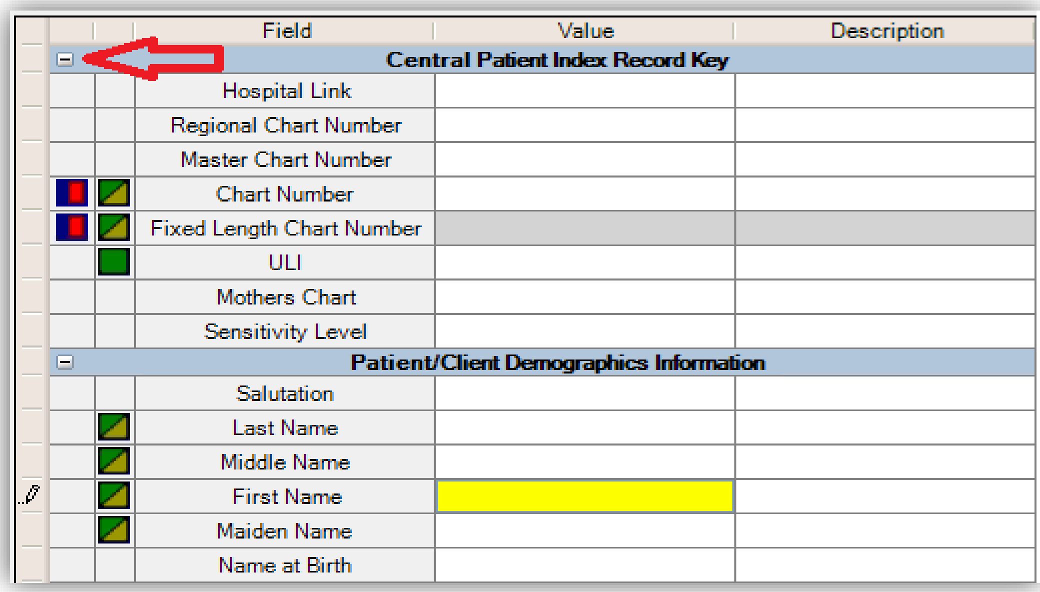


Figure 219 - Group field section expanded

To expand a group field section

- Click the icon to open the section header

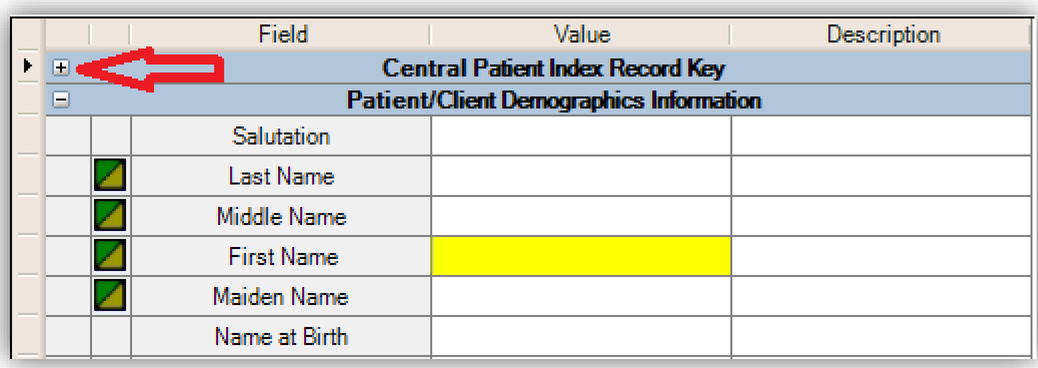


Figure 220 - Group field section collapsed

The section that has the focus will not collapse. E.g. In the Figure above the section "Patient/Client Demographics Information" can NOT be collapsed.

Fields grid quick search [F3]

Use the fields grid quick search to quickly navigate to a field.

To access the fields, grid quick search

- Press **[F3]**.

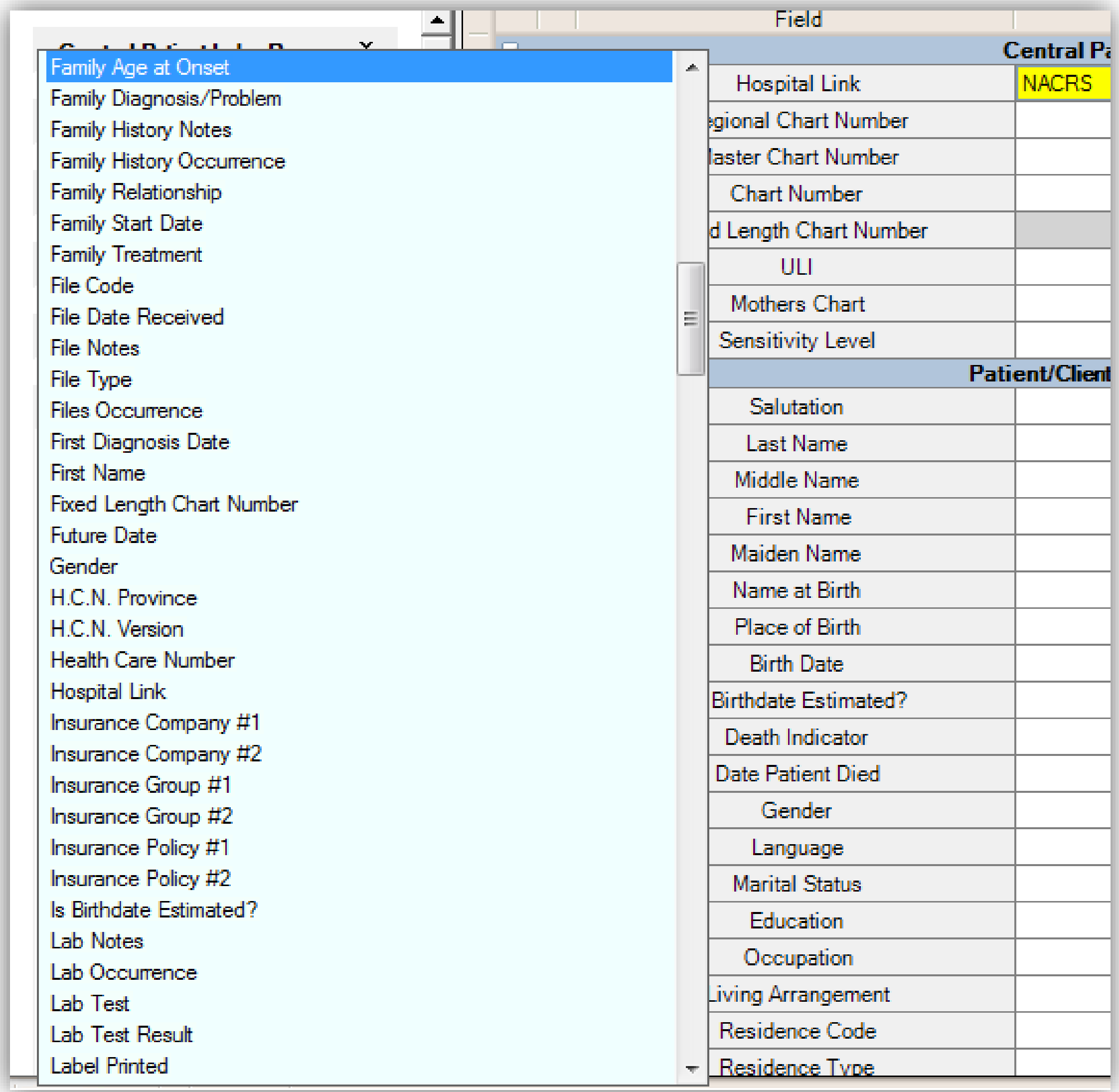


Figure 221 - Fields grid quick search

To navigate on the fields, grid quick search

- Click on the field you want to navigate to.

  — or —

- To quickly move through the list, you can type the first letter of the field name. E.g. to move near “`First Name`”; type “*f*”. (Pressing a letter repeatedly will move you through choices beginning with that letter).

Field	Value	Description
Central Patient Index Record Key		
Hospital Link	NACRS	
Regional Chart Number		
Master Chart Number		
Chart Number	453098	
Fixed Length Chart Number		
ULI		
Mothers Chart	186500	
Sensitivity Level		
Patient/Client Demographics Information		
Salutation		
Last Name	Last 453098	
Middle Name	FEMALE	
First Name	First 453098	
Maiden Name		
Name at Birth		
Place of Birth		
Birth Date	2012/05/11	
Is Birthdate Estimated?		
Death Indicator		
Date Patient Died		
Gender	F	Female
Language		
Marital Status		
Education		
Occupation		
Living Arrangement		
Residence Code		
Residence Type		

Figure 222 - Fields grid quick search result

Fields grid multi-form sections

Multi occurrence section, like “**Provider Data**” cannot be expanded. Double-clicking the header of a multi-occurrence section will open the multi-form associated with the section.

To open a multi-form from the Section header

- Double-click the section header.

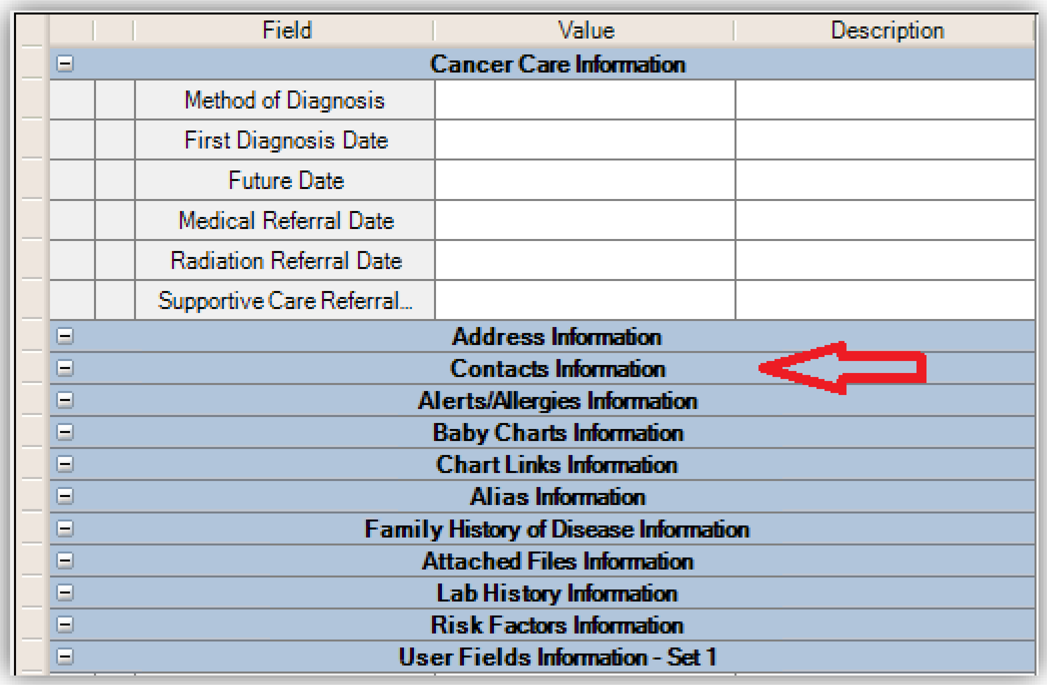


Figure 223 - Multi-form form section header

5.12 Multi-forms

Multi-Forms are embedded in a module's main grid and allows multiple occurrences, for example, the Diagnosis, Intervention, Providers. Since more than one diagnosis, intervention, provider may be entered for an abstract the multi-form is used.

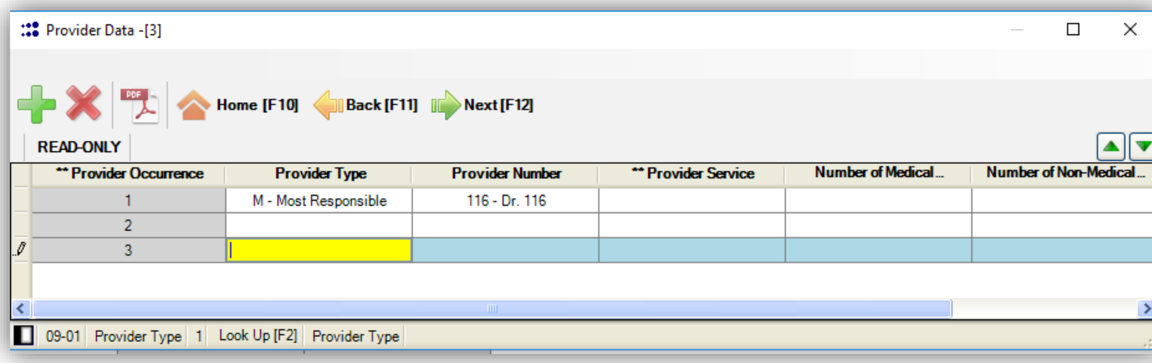


Figure 224 - Multi-form

The following are images of the different toolbars for the multi-forms. The generic toolbar image shows what most of the multi-form tools look like. The intervention and diagnosis multi-forms have different tool available to them.

Figure 225 - Generic Multi-Form Toolbar

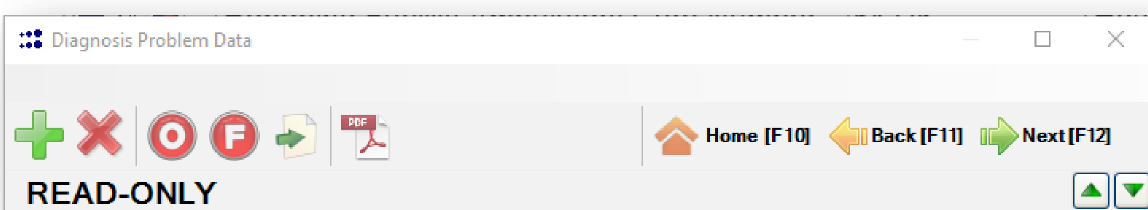


Figure 226 - Diagnosis Data Multi - Form Toolbar

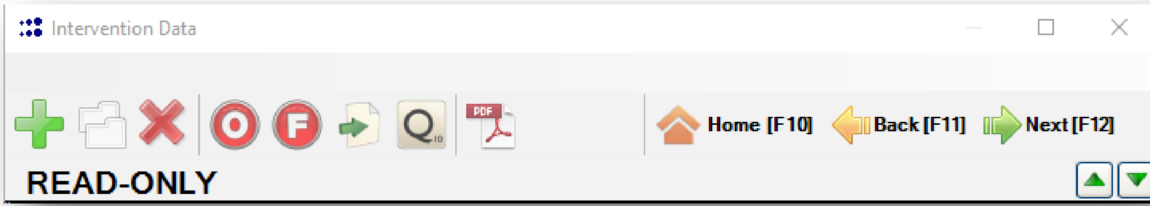


Figure 227 - Intervention Data Multi-Form Toolbar

Chart outlining the Multi-form toolbar icons, shortcut keys and description of the functionalities.

 or **[F5]**	Adds an entry row to the grid allowing the user to enter a new set of fields.
 or **[F9]**	Deletes the current row.
	Copy feature **-** Intervention multi-form only – Ability to copy the intervention information from the previous occurrence.
 or [F7]	Opens another linked encoder application (only available in Diagnosis and Intervention multi-forms) and if encoder information is filled in **Hospital Profile**
	Opens the CIHI Folio (only available in Diagnosis and Intervention multi-forms). The **File/Folder Paths/Folio** paths need to be entered in the **User Profile.**
	Import Folio File feature **-** Opens a Dialog window to allow user to import a Folio Code Basket File into WinRecs Diagnosis or Intervention multi-forms.
 or **[F6]**	Quick Hint – Intervention Data Multi-Form only – Displays the most recent common Intervention codes that have been used.
	Opens the PDF File Viewer
 or **[F10]**	Closes the multi-form and places the focus back on the main grid of abstract.
 or **[F11]**	Opens the previous field that uses a multi-form.
 or **[F12]**	Opens the next field that uses a multi-form.

Table 21 - Multi-Form Toolbar

To access the multi-forms

- When entering data in an abstract or the CPI MODULE grid, pressing the **[ENTER]** key to move to the next field will open the multi-form if the next field can have multiple occurrences.

  — or —

- Click a specific multi-occurrence field in the field navigation list.

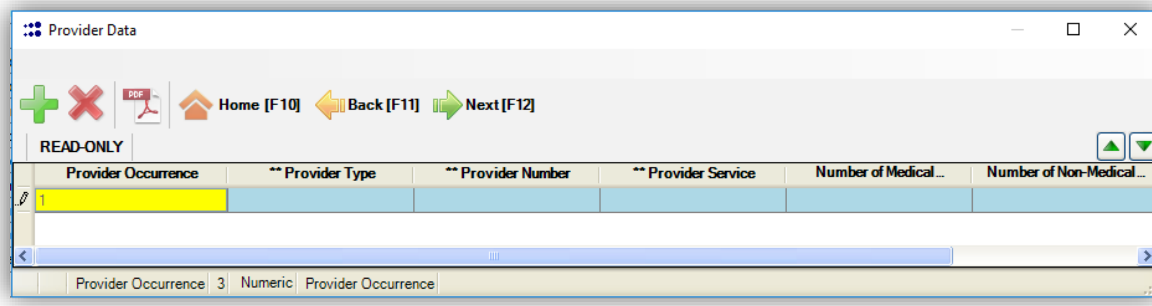


Figure 228 - Accessing a multi-form

To enter data in a multi-form

When a multi-form is open, the focus is on the first field of the first row. Enter the data required in the first field. Pressing **[ENTER]** will move the focus to the next field to the right.

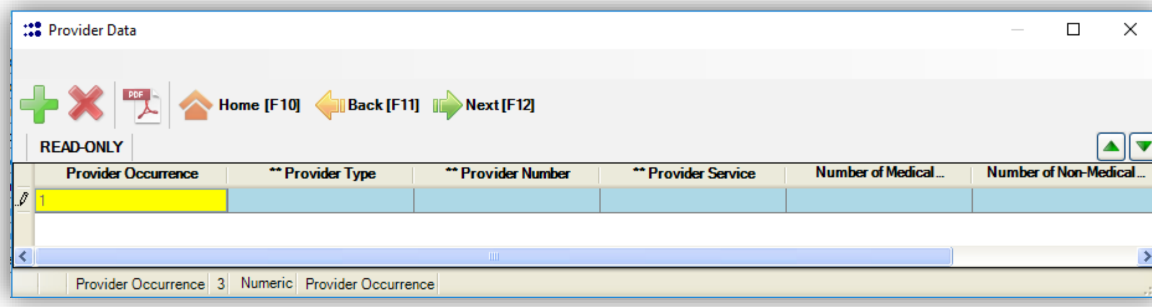


Figure 229 - Entering data in a multi-form

To add a new row of data

- To enter another row of data, press the  icon on the toolbar.
- The focus will be set to the first field of the new row.

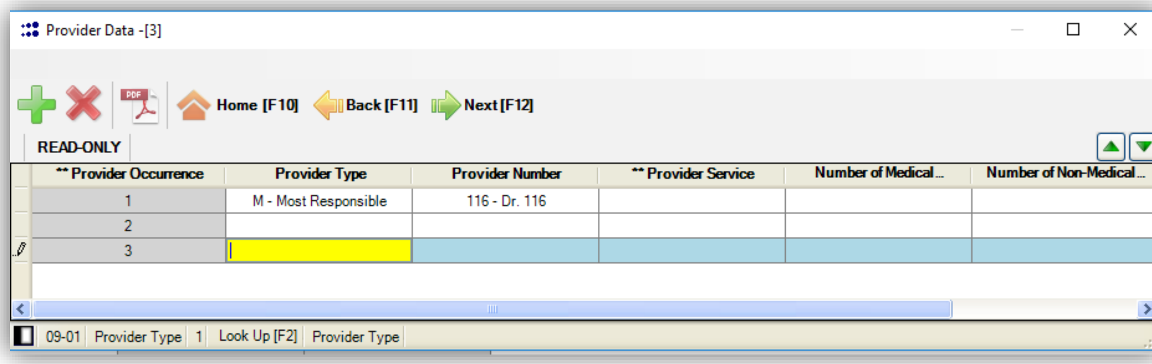


Figure 230 - Multi-form multiple rows

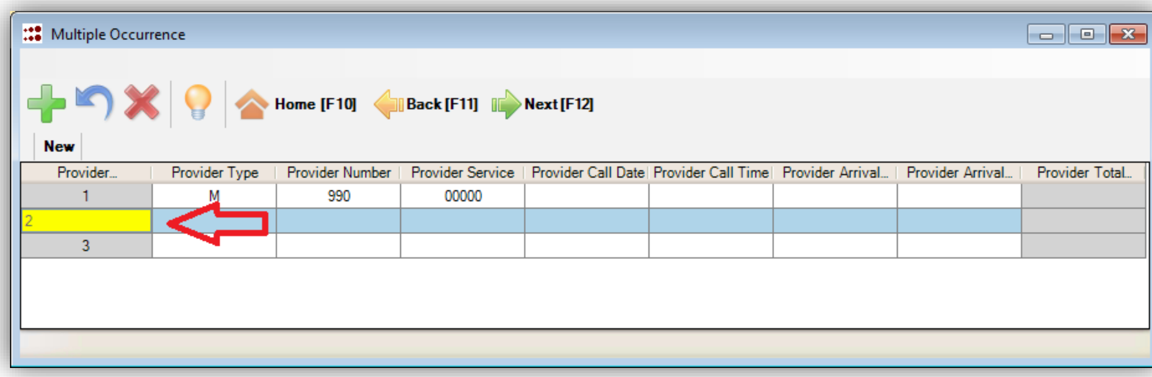


Figure 231 - Multi-form row selected for undo

To delete the data entered and the row

- Click on the header of the row (as shown by the arrow on the figure below)
- Click on the Delete icon on the toolbar

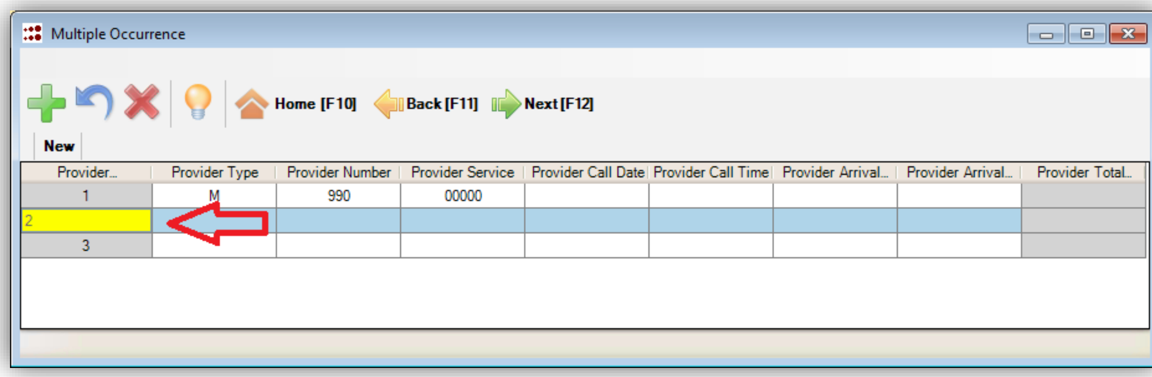


Figure 232 - Multi-form row selected for delete

To close the multi-form and navigate back to the Main window

When the entry is complete navigate back to the Main window.

- Press **[F10].**

  — or —

- Click the Home  icon on the toolbar.

Using the Home function will set the focus to the first field of the entry grid on the Main window.

To navigate automatically to the next field

When the entry is completed, navigate to the next field. If the next field is a multi-occurrence field the multi-form will stay open and the next multi-occurrence field will be displayed by the multi-form; otherwise the multi-form will be closed and the next field of the main grid will have the focus.

- Press **[F12].**

  — or —

- Click the Next  icon on the toolbar.

To navigate automatically to the previous field

Once the entry is completed, navigate to the previous field. If the previous field is a multi-occurrence field the multi-form will stay open and the previous multi-occurrence field will be displayed in the multi-form; otherwise the multi-form will be closed and the previous field of the main grid will have the focus.

- Press **[F11].**

  — or —

- Click the Previous  icon on the toolbar.

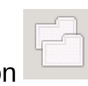
Diagnosis Code

In the Diagnosis Code field, the search function are as follows:

- By partial Diagnosis Code eg: I50 and a search screen with all codes with I50 will display
- By Full Diagnosis Code eg: I500 or I50.0 will fill in the diagnosis code
- By partial/full diagnosis code and partial description eg: I50 Congestive – will populate the code or a search screen of all codes with search will display.

Copy Function – Intervention Multi-Form

Gives the user the ability to copy Intervention information from the previous occurrence in Inpatient and Amcare records.

- Fill in occurrence 1 with the required information
- Create occurrence 2, click on the Copy Function 
- Pressing this will populate all fields from the previous occurrence except the `Intervention Code`. Any changes can be done manually
- If needed, the user may copy data for occurrence 3 and this will populate from occurrence 2.

Descriptions – Multi-Forms

Descriptions are now displayed in the same cell as the selected item for the given field. All multi-forms with fields that have a description associated with the field will appears as follows; Field Value – Value Description.

The following example shows each column for the Provider Data Multi-Form. User will see the value of each selected field followed by the description.

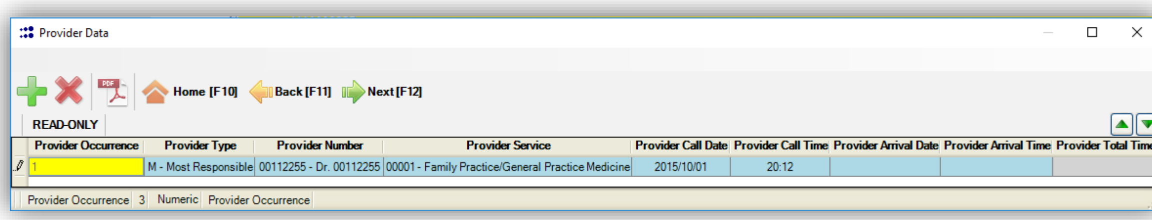


Figure 233 - Provider Data Multi-Form

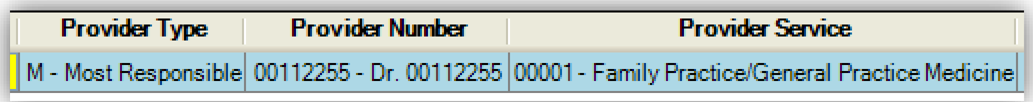


Figure 234 - Close up View

When the user selects a field on a multi-form the status bar will show the description of the selected item, while the cell shows the selected value.

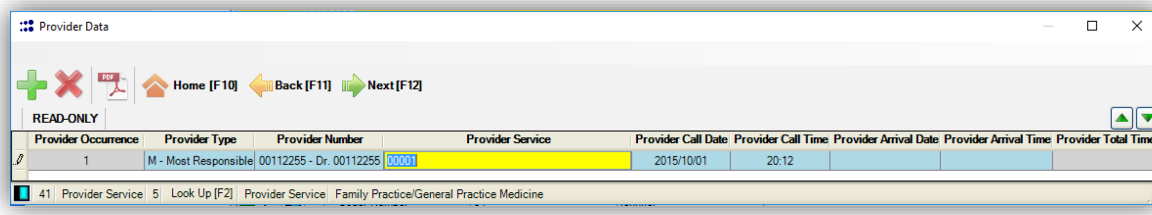


Figure 235 - Provider Data - Provider Service and Description

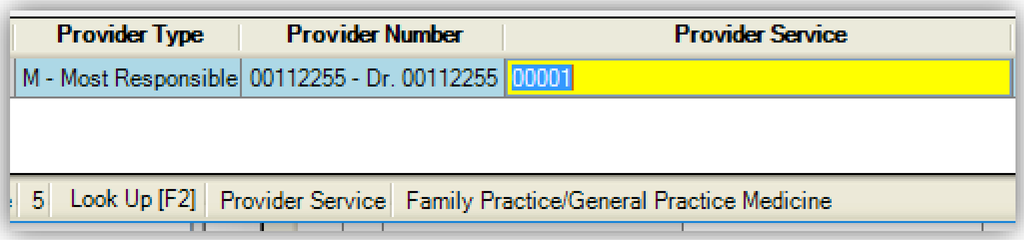


Figure 236 - Close up View of the Selected Field

5.13 Look up

Field of type Look Up can only accept values from a predefined list of values. This list can be maintained via the **Maintenance → Look Up Code Maintenance** menu.

When you are on a field that is of type Look Up you can access the list of valid code by pressing **[F2]**

To enter a valid value from the Look Up List

- Type in the value. E.g. for a male gender you can just type in the field *m*

To access the Look Up list

- Press **[F2]** – this will only display the look up list if the currently selected field is of type **Look Up**

To select a value from the Look Up List

- Click on the desired value on the list, then click the “**Select Record**” button

— or —

- Double-click the desired value on the list.

To close the Look Up List without selecting a value

- Click the in the window title bar.

  — or —

- Press **[ESC]** twice in a row

Look up lists size

Look up list will only display the first 100 results. The look up window will display the message: "`There may be more results. Consider refining your search`", as shown below.

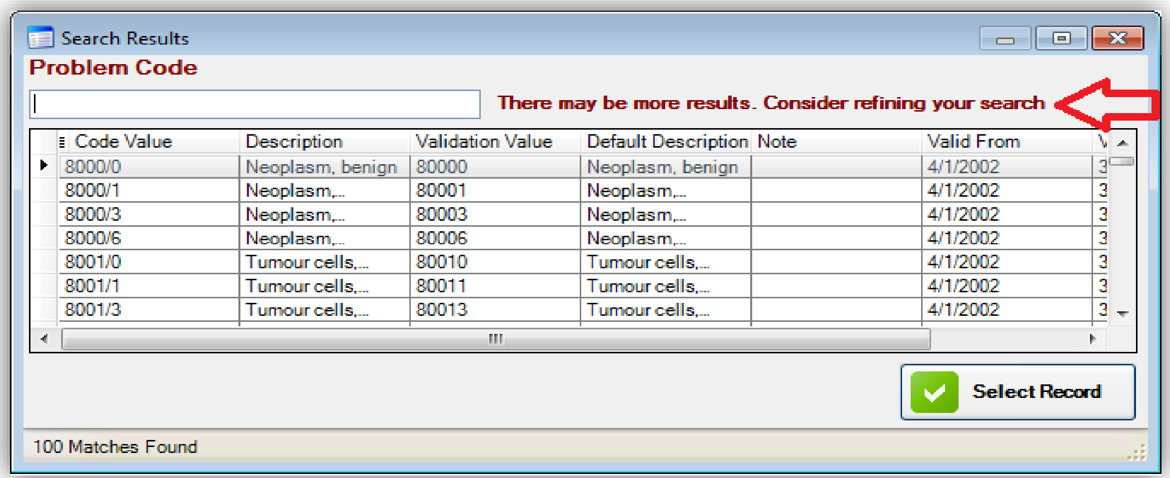


Figure 237 - Look up list size

In this case you should filter your list

To filter the Look Up List

Some look up lists are very long, filter the list by:

- In the field enter your filter criteria, the press **[ENTER]**. E.g. for the language field you can type *en*

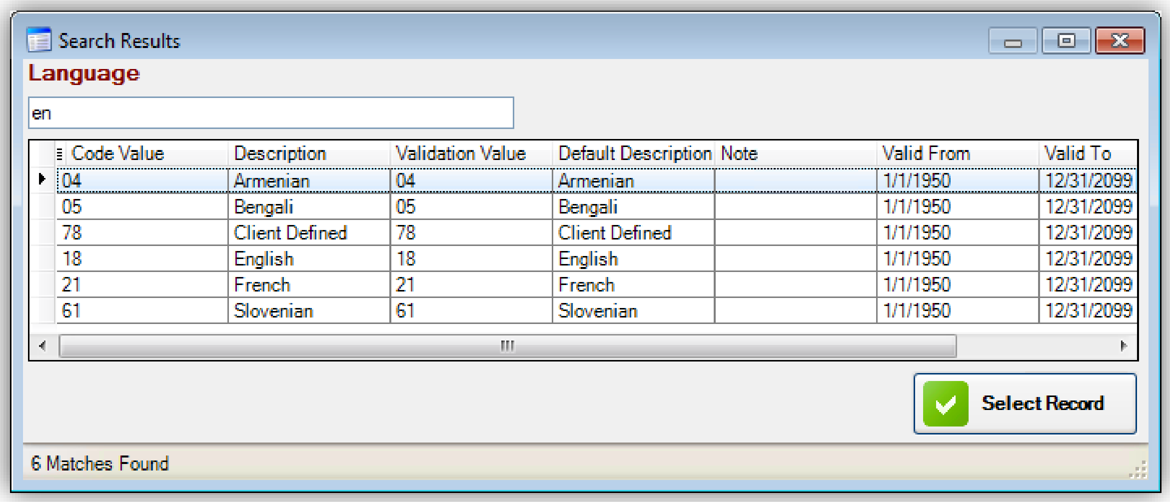


Figure 238 - Look up list pre-filtered

— or —

- Open the Look up list by pressing **[F2].**
- In the search text box, on the upper left corner of the window, type in your filter criteria.
- Press **[ENTER]**.

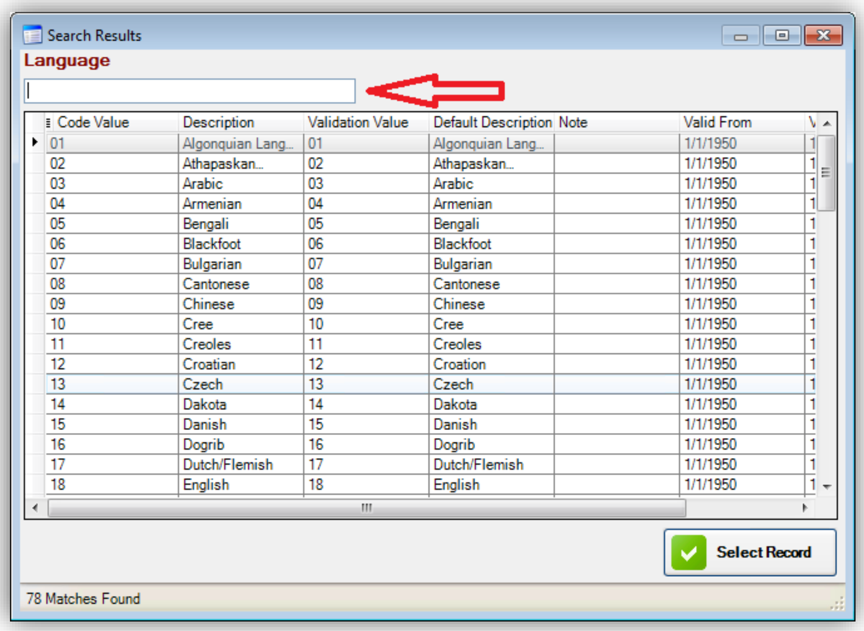


Figure 239 - Look up list filtering step 1

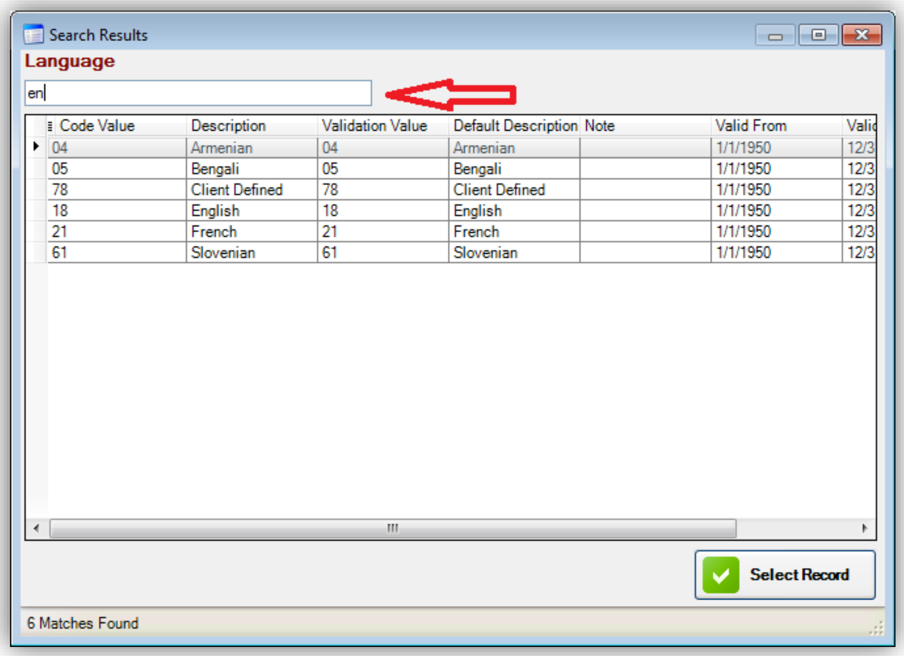
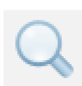


Figure 240 - Look up list filtering step 2

Look Up Maintenance Report

The Look Up Maintenance Report is a report that will list all the look up values available for a field. The report will need to be set up in the Report Maintenance module see Reports

To run the report:

- Click on the Look Up Field
- Press the  or **[F4]** and search for the value

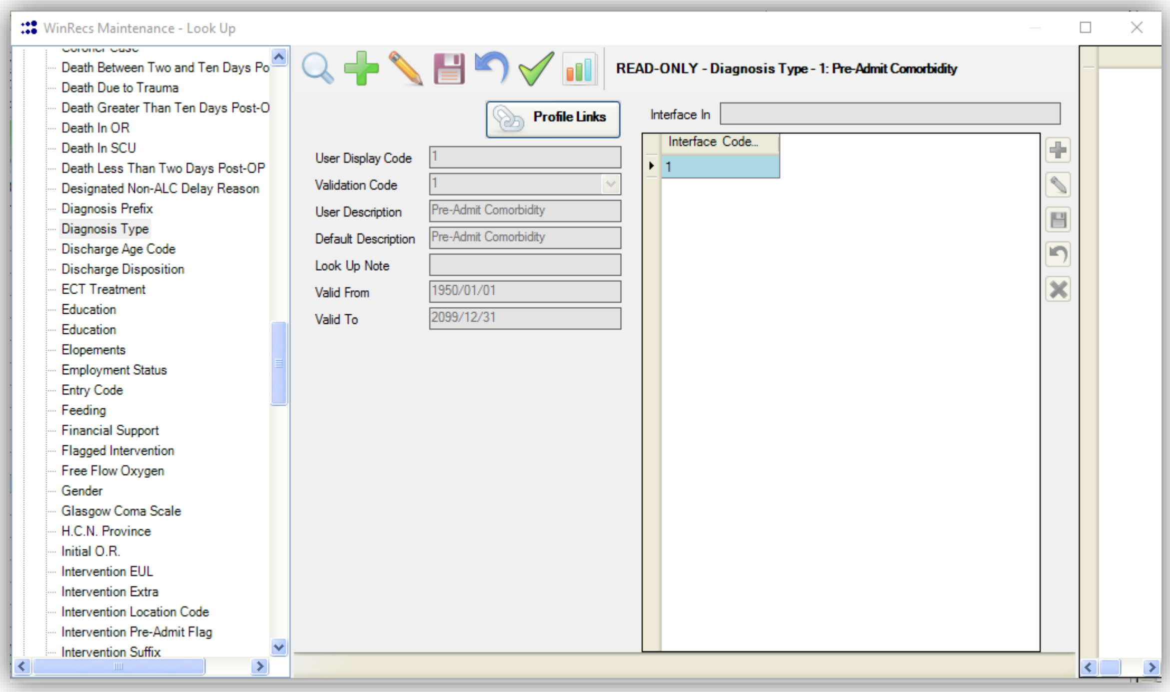


Figure 241 – Look Up Vale

- Press  or **[F10]**
- Click on the Report Name for Look Up Maintenance Report
- Enter the Parameters

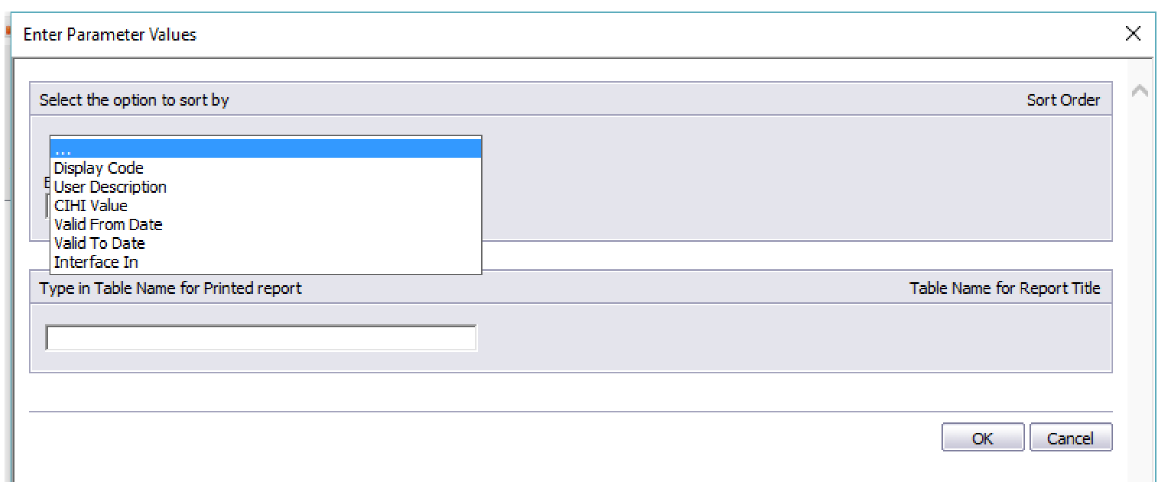


Figure 242 – Report Print Parameters

- Press Ok and the list of look up values for the specified fields will display

Display Code	Hospital Link	User Description	Default Description	CIHI Value	Valid From	Valid To	InterfaceIn
0		Optional/NB Via CS	Newborn Diagnosis	0	2001/04/01	2001/03/31	
0		Newborn/C-Section Code	Newborn/C-Section Code	0	1950/01/01	2099/12/31	
1		Pre-Admit Comorbidity	Pre-Admit Comorbidity	1	1950/01/01	2099/12/31	
2		Post-Admit Comorbidity	Post-Admit Comorbidity	2	1950/01/01	2099/12/31	
3		Secondary	Secondary Diagnosis	3	1950/01/01	2099/12/31	
4		Morphology	Morphology Code	4	1950/01/01	2099/12/31	
5		Admitting Diagnosis when different than Most Responsible Diagnosis	Admitting Diagnosis	5	2005/04/01	2099/12/31	
5		Optional	Optional	5	1950/01/01	2005/03/31	
6		Proxy Diagnosis (Asterisk code used for CMG Assignment)	Proxy Most Responsible Diagnosis (MRDx)	6	2005/04/01	2099/12/31	
6		Optional	Optional	6	1950/01/01	2005/03/31	
7		Optional	Optional	7	1950/01/01	2011/03/31	
8		Optional	Optional	8	1950/01/01	2011/03/31	
9		E-Code	External Cause of Injury Code	9	1950/01/01	2099/12/31	
M		Most Responsible	Most Responsible Diagnosis (MRDx)	M	1950/01/01	2099/12/31	
W		First Transfer Diagnosis	First Transfer Diagnosis	W	1950/01/01	2099/12/31	
X		Second Transfer Diagnosis	Second Transfer Provider	X	1950/01/01	2099/12/31	
Y		Third Transfer Diagnosis	Third Transfer Diagnosis	Y	1950/01/01	2099/12/31	

Report Printed On: 12/16/2016

Figure 243 – Look Up Values Report

5.14 Reports

Reports are set up through the Maintenance/Report Maintenance

To open the Report Manager

- Press **[F10].**

  — or —

- Select the menu option **Actions → Report Manager.**

  — or —

- Click the Report Manager button on the toolbar .
- The Select Report window will open with the reports available for this module

  2. or -

- Go to 'Report File:' – press **[F2]** and a directory window will pop up for you to go to the list of reports

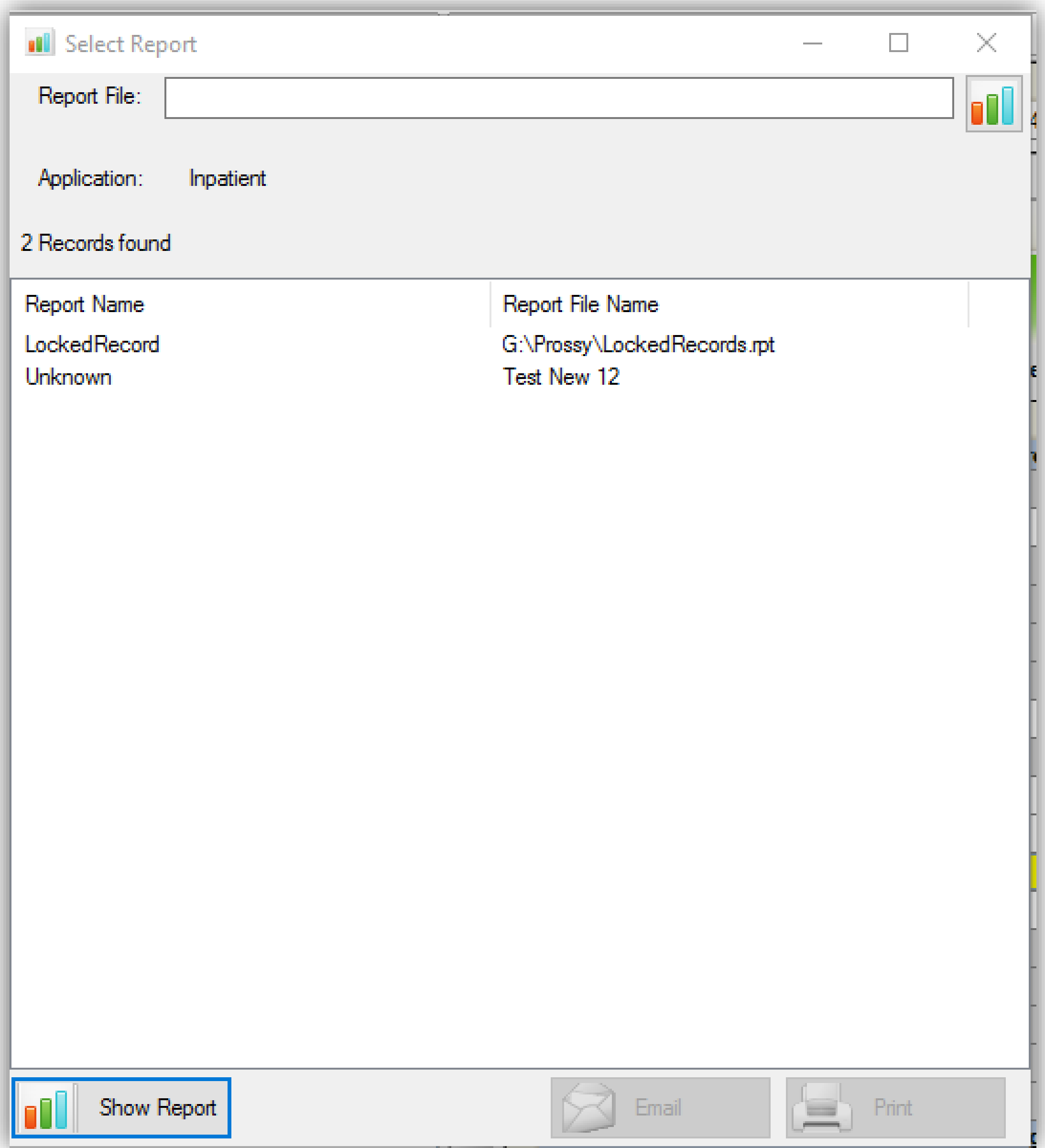
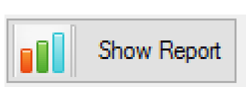
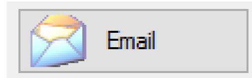
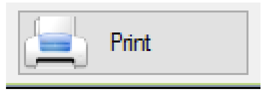


Figure 244 - Select Report Screen

- Press Show Report 

- The report can also be emailed 

which is set up in Report Maintenance
- The report can also be printed 

- Report Manager will open depending on the report parameters may be needed or if no parameters the report will open.

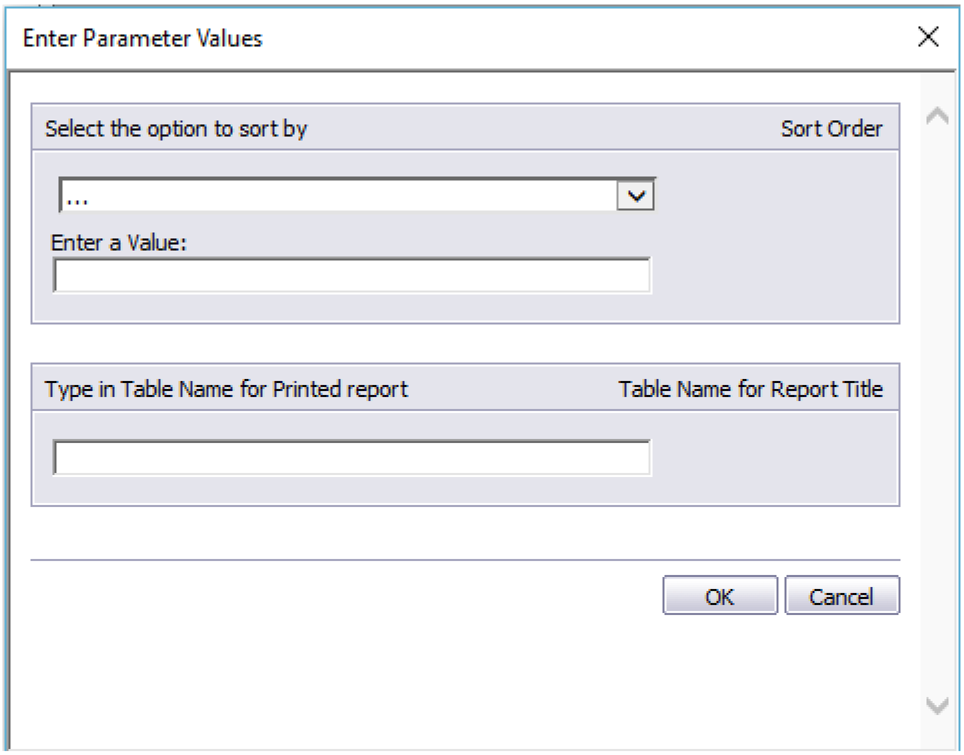


Figure 245 – Parameter Screen

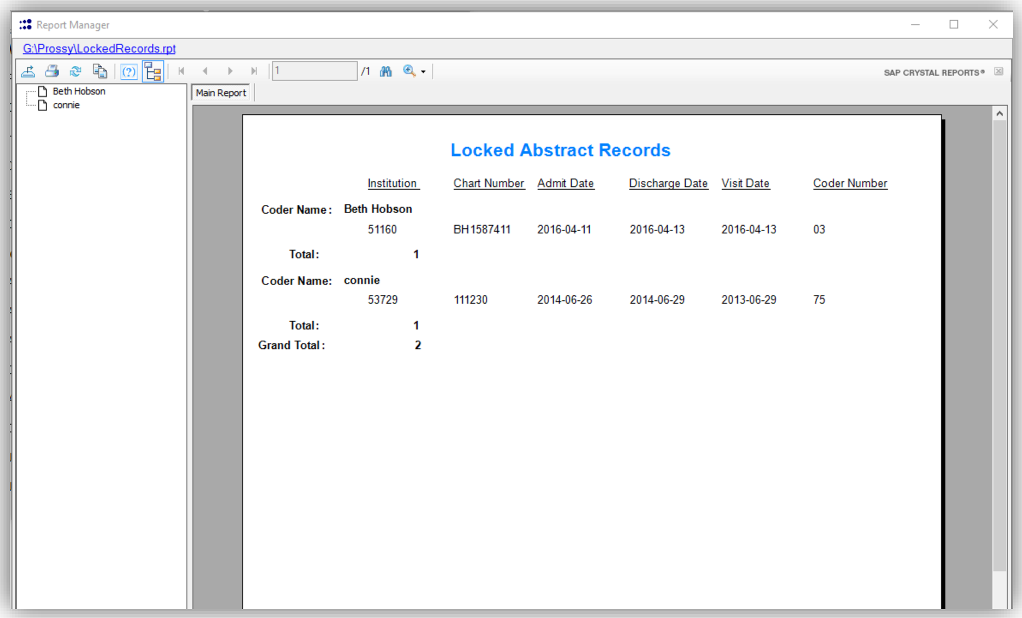


Figure 246 – Opened Report

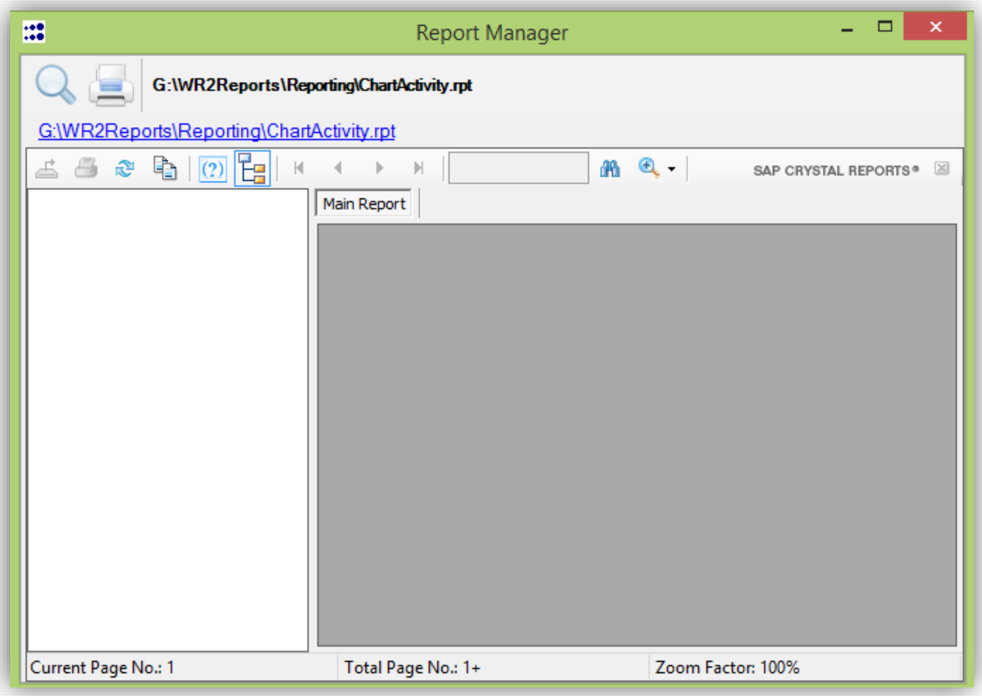


Figure 247 – Report Manager Window

5.15 Interfacing with Folio Views Code Basket

WinRecs has incorporated the ability to interface with the Folio Views application software through the Code basket functionality.

Note: For information of how to use Code Basket functionality please contact CIHI.

To configure

- Go to Options → User Profile → File/Folder Paths → Find User → Edit

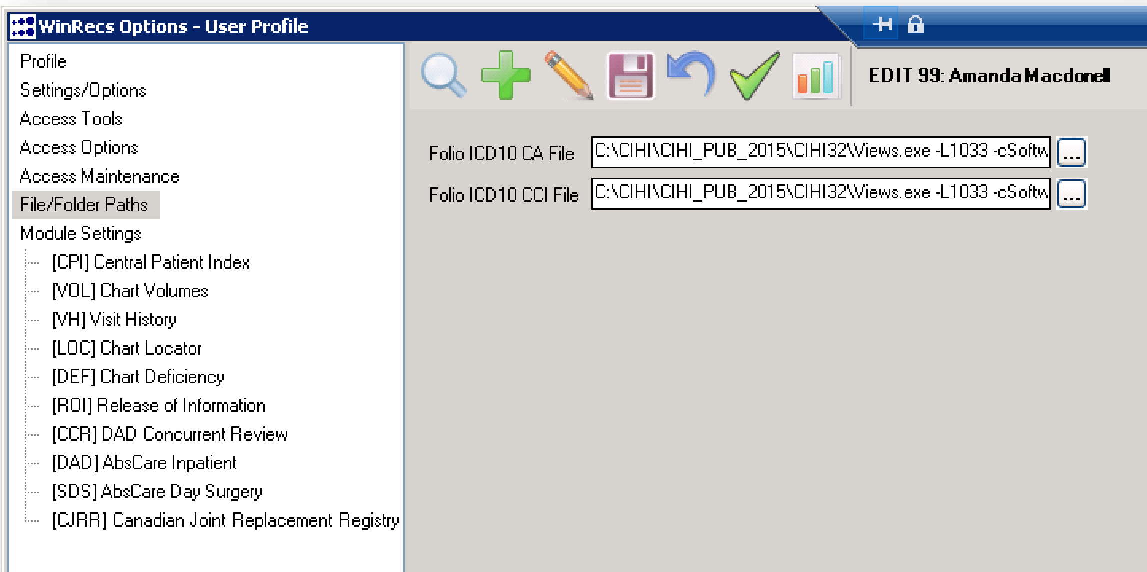


Figure 248 - Configure Code Basket

Skeleton File Paths

ICD10-CA:

C:\CIHI\CIHI_PUB_2015\CIHI32\Views.exe -L1033 -cSoftware\CIHI\2015\ICD10_CodeBasket\English -i"C:\CIHI\CIHI_PUB_2015\SDW\icd_2015_eng.sdw" -r"C:\CIHI\CIHI_PUB_2015\cb_en.txt"

CCI:

C:\CIHI\CIHI_PUB_2015\CIHI32\Views.exe -L1033 -cSoftware\CIHI\2015\ICD10_CodeBasket\English -i"C:\CIHI\CIHI_PUB_2015\SDW\cci_2015_eng.sdw" -r"C:\CIHI\CIHI_PUB_2015\cb_en.txt"

Note: These file paths may need to be modified, depending on location of software.

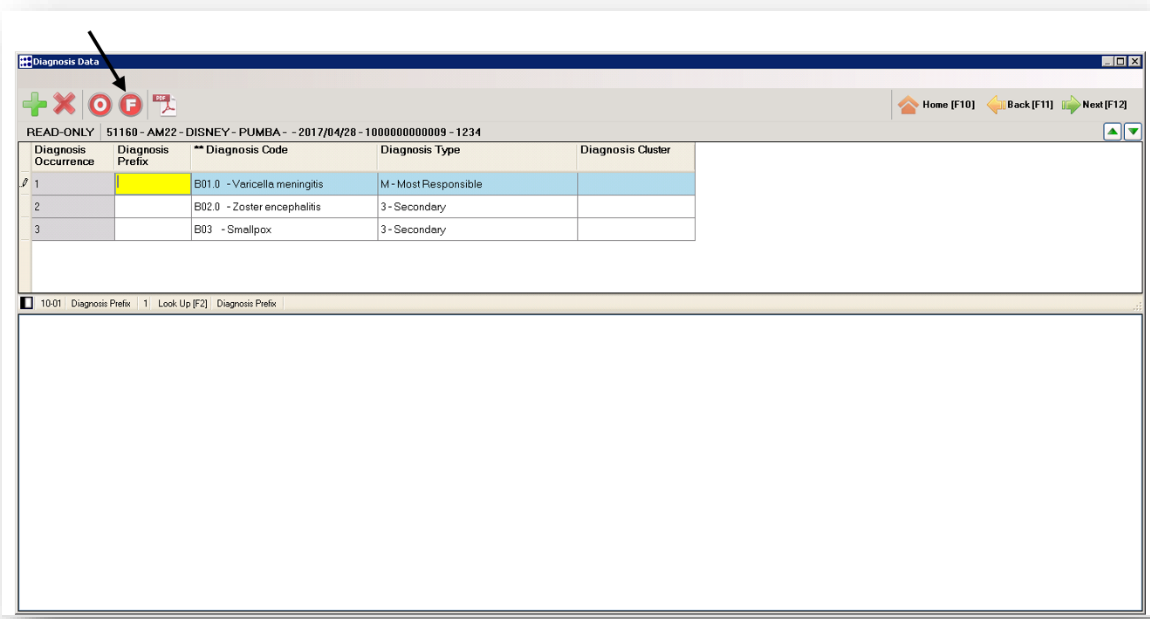
A temporary file is created when importing the codes, and where it's written to is determined by the last part of each file path (in bold below). You can determine a location that you have write access to that you'd like to have the temporary files write to and update the path to reflect that. These are temporary files, that will delete once the codes are imported into WinRecs.

C:\CIHI\CIHI_PUB_2015\CIHI32\Views.exe -L1033 -cSoftware\CIHI\2015\ICD10_CodeBasket\English -i"X:\SHADOWFILES2015\ICD2015-Merged.sdw" **-r"C:\CIHI\CIHI_PUB_2015\cb_en.txt"**

Folio Paths can also be set up at the Regional Profile / Hospital Profile Level for all users.

Importing from Folio Code Basket into WinRecs

- From within the Diagnosis or Intervention screen select the Folio button on the tool bar.



Note: User doesn't need to be on the Diagnosis Code or Intervention Code fields when launching Folio.

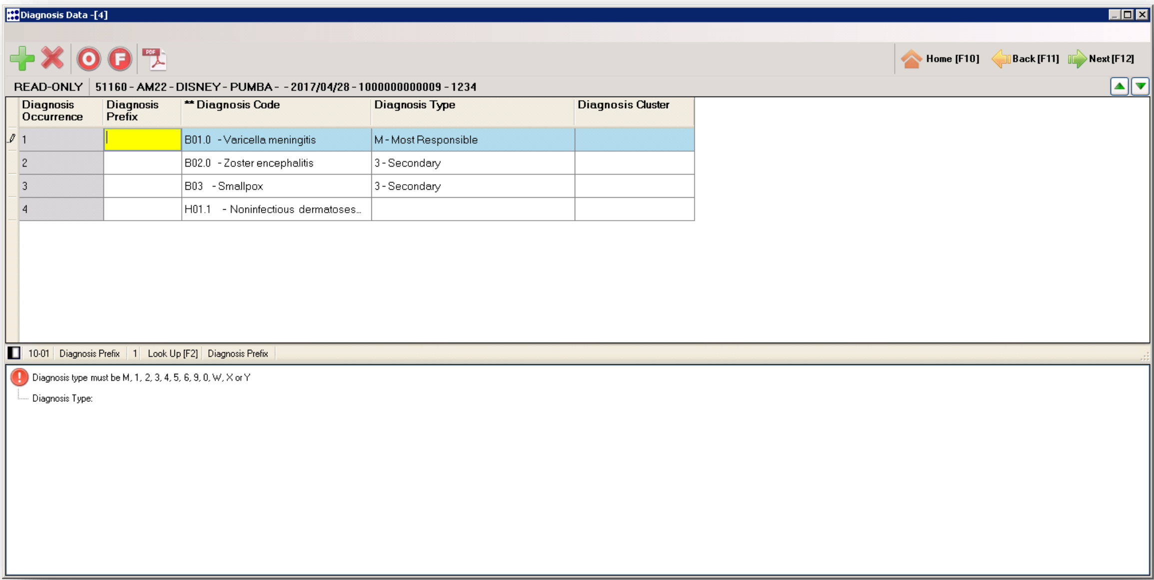
o When Folio launches, WinRecs displays a dialog that the Coder will use to indicate the Folio session is complete, allowing WinRecs to pull the selected codes from the Code Basket.

Do not close ('OK', 'Cancel', or 'X') this dialog box until the codes have been added to the Code Basket – this is what triggers the import into WinRecs, if it is closed prior to adding the codes, there will be nothing to trigger the import once they have been added, and you will need to launch a new Folio to prompt the dialog box again.

- In Folio, load codes into Folio Code Basket, as per instructions from CIHI.
- When the code basket has the codes needed, you can close Folio.
- Then you can click on OK, to trigger the import of the codes into WinRecs

Note: If you no longer want to import the codes and want to leave the abstract as it was prior to opening Code Basket, you can select Cancel.

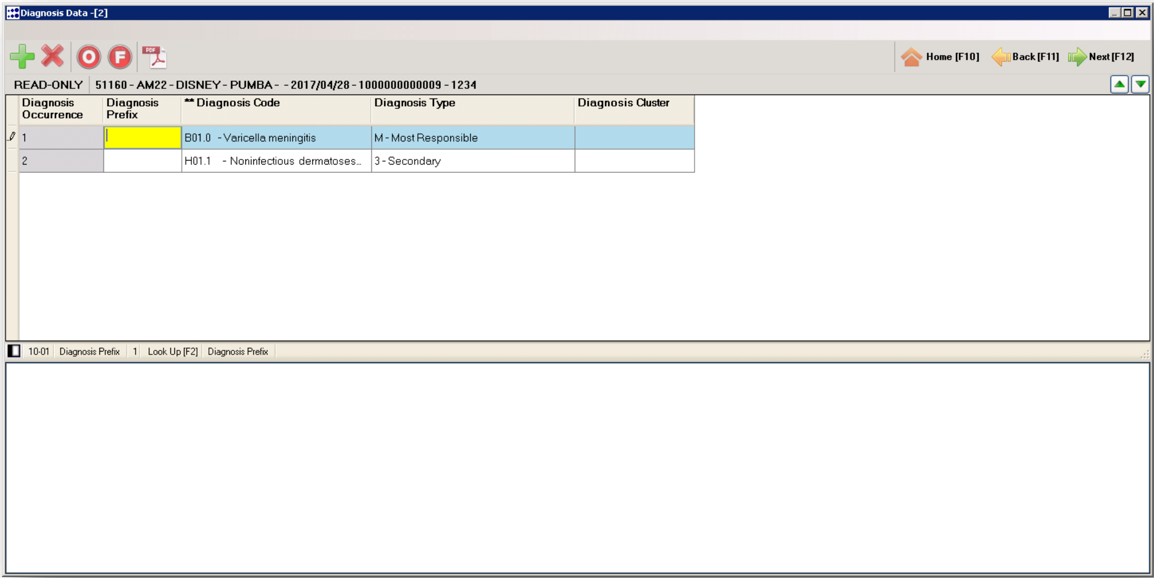
- All codes that were in the code basket will now display in the abstract:



It's also possible to remove previously selected codes from WinRecs, via Folio, if they are no longer deemed relevant.

- Go to Code basket as you would to import a code.
- Delete code from Folio Code Basket (as per instructions from CIHI). Once you've deleted any codes you'd like to, you can close folio.
- Once back in WinRecs, select OK on the dialog box.

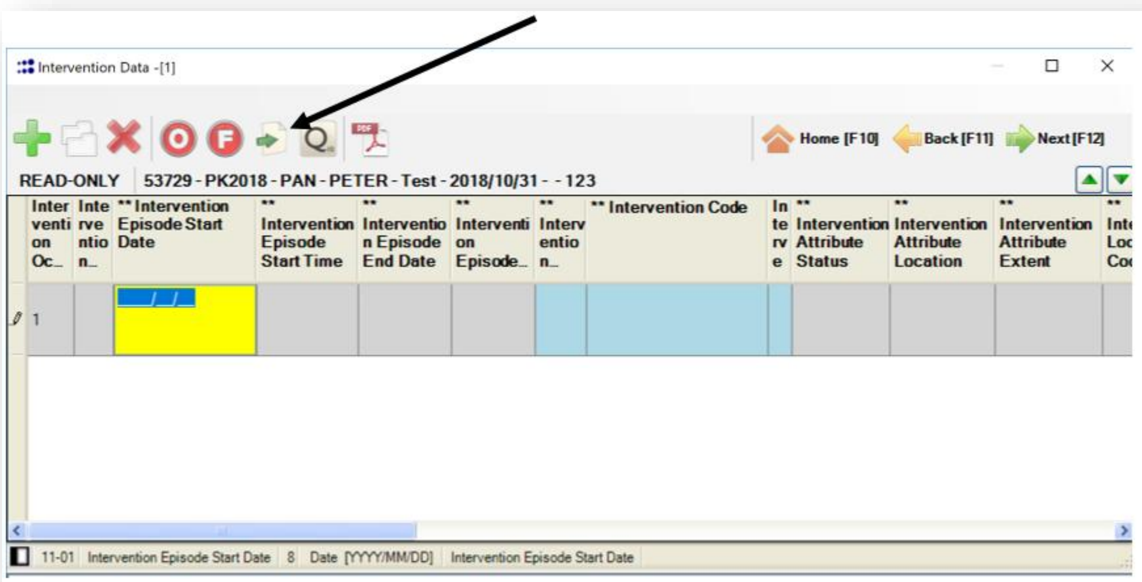
When the dialog is closed, WinRecs imports the 2 selected codes and removes the 2 deleted codes:



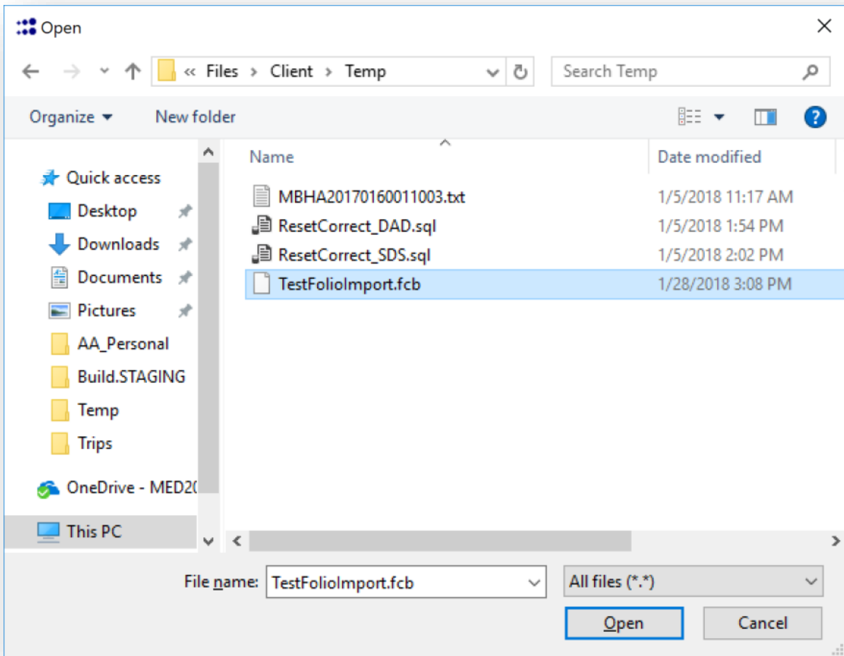
Importing a Folio Code Basket File

The file(s) will need to be created from Folio Views before following the instructions below. Please consult CIHI for instructions about saving files from Folio Code Basket.

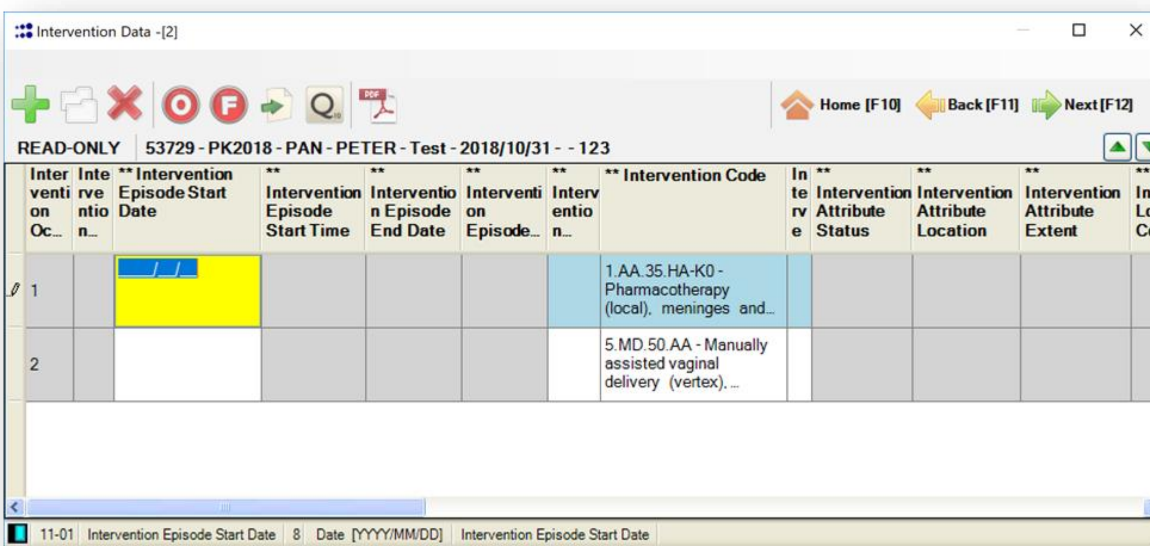
- From the Diagnosis or Intervention screen, select the import icon:



- Select the File (WinRecs will remember the last location)



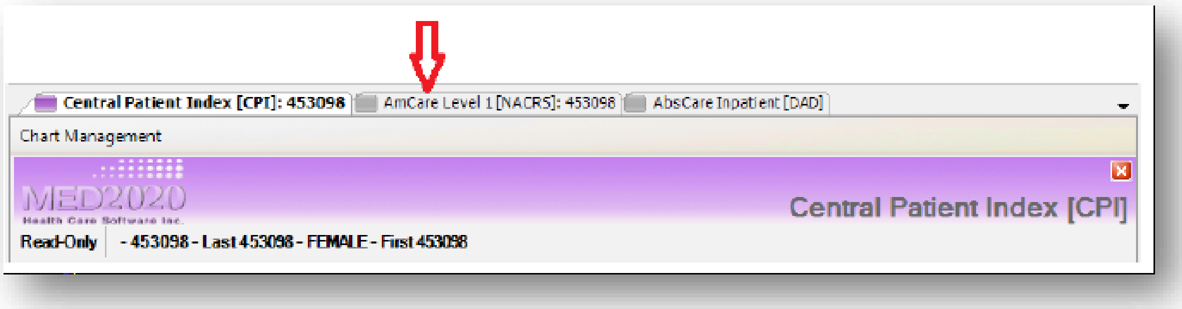
- The contents from the saved file will load into WinRecs



6. WinRecs Modules

WinRecs module windows are displayed in the main area of the application. To allow maximum flexibility and better navigation, you can open multiple records from different modules at the same time. This will allow the user to quickly toggle between records.

The text on the tab helps to identify the record that is open. The information displayed on the tab is configurable in the Control File.



6.1 Chart Maintenance

The Chart Maintenance Module Consists of the **CPI MODULE**, **Chart Volumes**, **Visit History, Chart Locator, Chart Deficiency** and **Release of Information** modules.

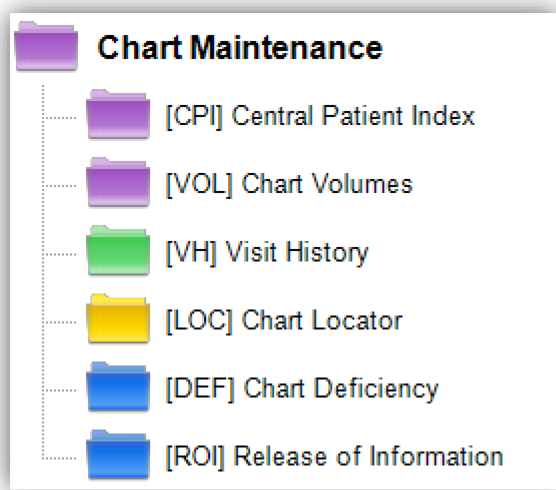


Figure 249 – Chart Maintenance Modules

6.1.1 Central Patient Index [CPI MODULE] Module

The Central Patient Index [CPI MODULE] stores patient demographic information such as record key, patient demographics and user field information. Included in the **CPI MODULE** is the **Chart Management** features which modifies chart information.

To open the CPI MODULE

- Select the menu option **Module → Chart Maintenance → [CPI MODULE] Central Patient Index**

  — or —

- Select **WinRecs Module Menu → Chart Maintenance→ [CPI MODULE] Central Patient Index**

Module Header

Figure 250 - CPI MODULE Header

Chart Management

- Click on the chart management menu item on the CPI MODULE header.

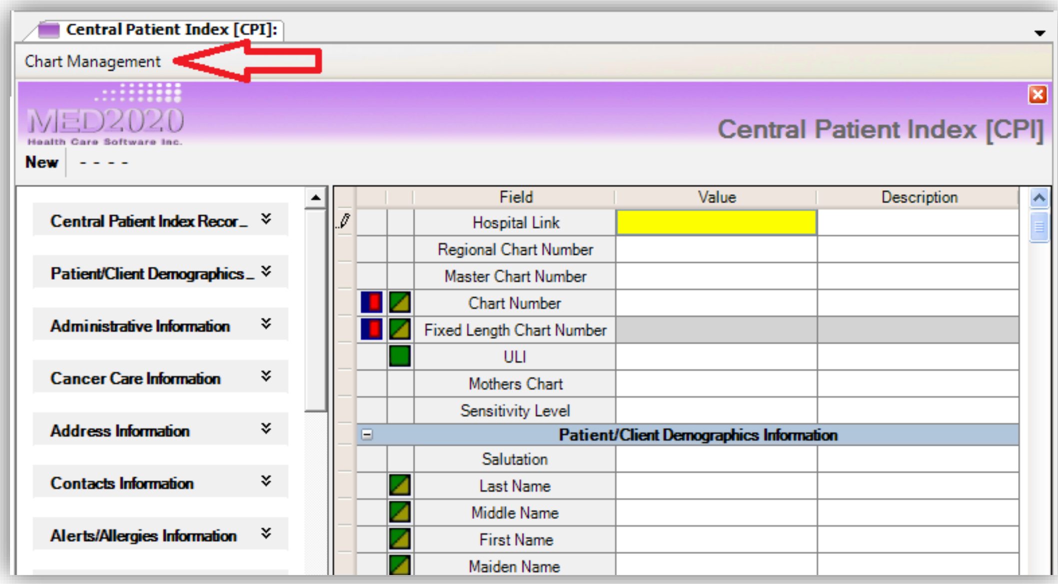


Figure 251 - Chart management menu

- Click the Modify item

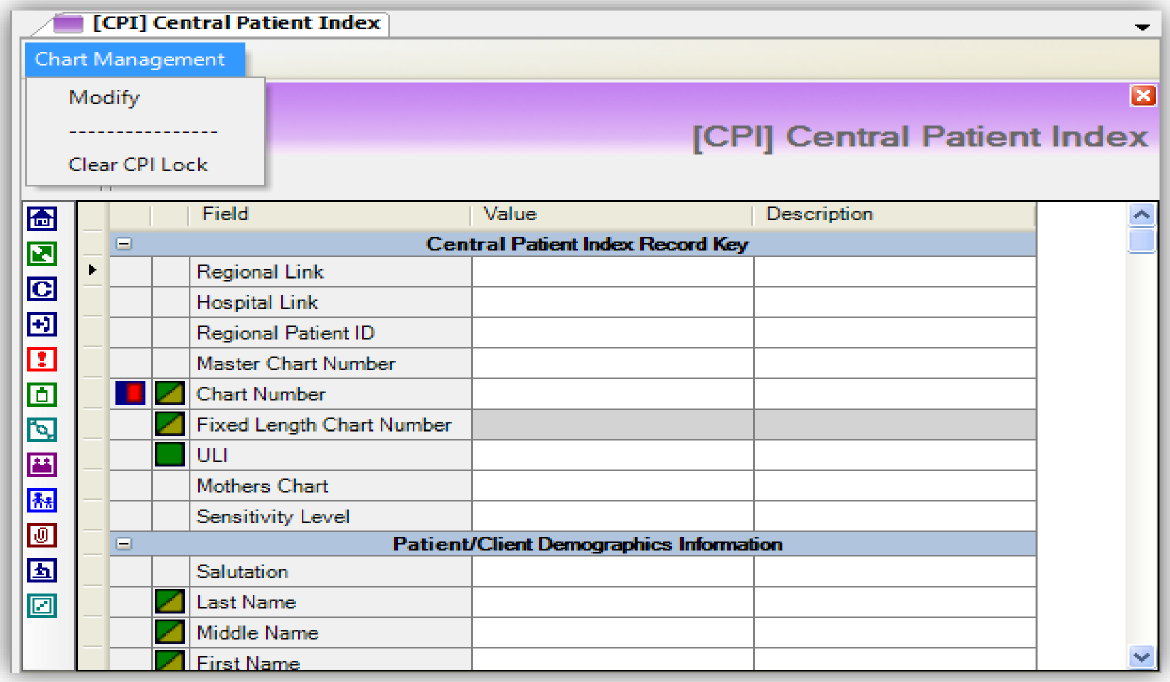


Figure 252 - Chart management menu open

-

The **WinRecs Chart Management - Modify** screen has 4 options to choose from:

```
1. Change Chart Number
2. Merge Charts
3. Unmerge Chart
4. Relocate Visits
```

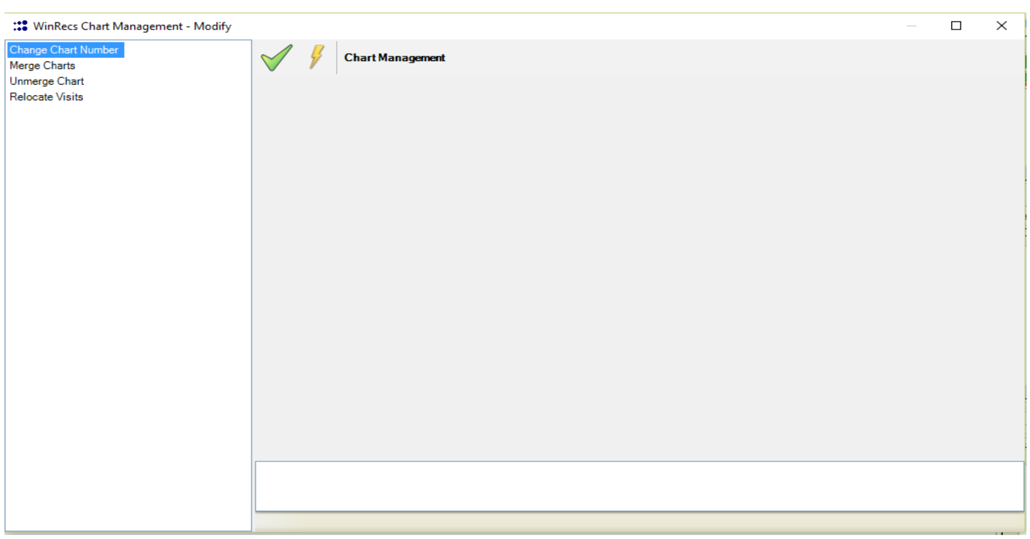


Figure 253 - Chart management window

 **-** Verify or Press **[F11]**

 - Execute or Press **[F12]**

Source Chart Number – the chart number that is changing or no longer using (child)

Target Chart Number – the chart number that is being kept (parent)

If Modify a Chart is not displayed in the CPI module, the user may not have the necessary permissions. Contact your WinRecs system administrator.

Change Chart Number

This is used to change one chart number to another chart number, the target chart number CANNOT exist in the CPI MODULE.

- In the CPI MODULE, do a chart search on the Source Chart Number (the number not being kept)
- Click on **Chart Management/Modify**
- Click on `Change Chart Number`
- The `Source Chart Number` will populate with the CPI MODULE number and all the visits will populate below the chart numbers
- Enter the `Target Chart Number` – this number should NOT be in the CPI MODULE, if the chart number already exists, you will get a pop up message stating:

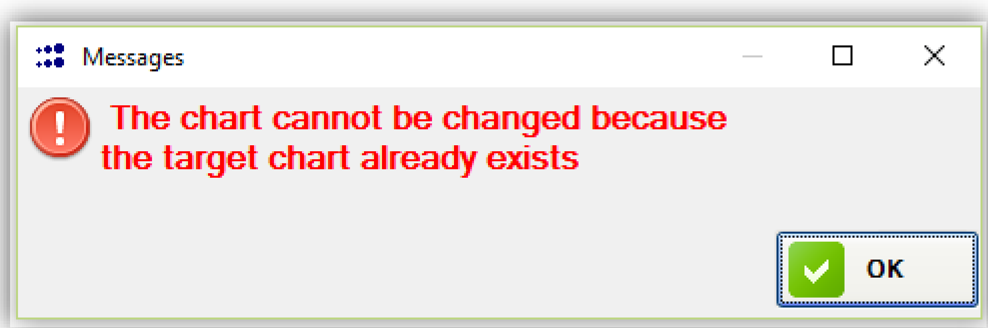


Figure 254 – Change Chart Number Message

- Press  or **[F12]** to execute. (If there are charts that have been submitted to CIHI see Submitted Records at the end of this section.)

- A pop up message will state, pressing Yes will continue, No will take you back to the main screen:

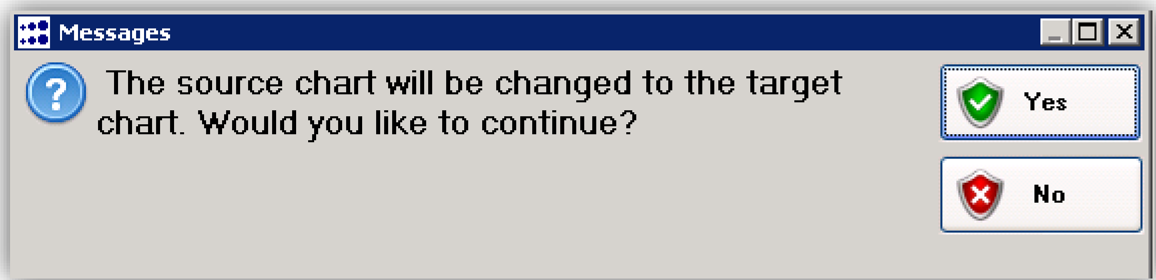


Figure 255 – Change Chart message

- A message will pop up stating:

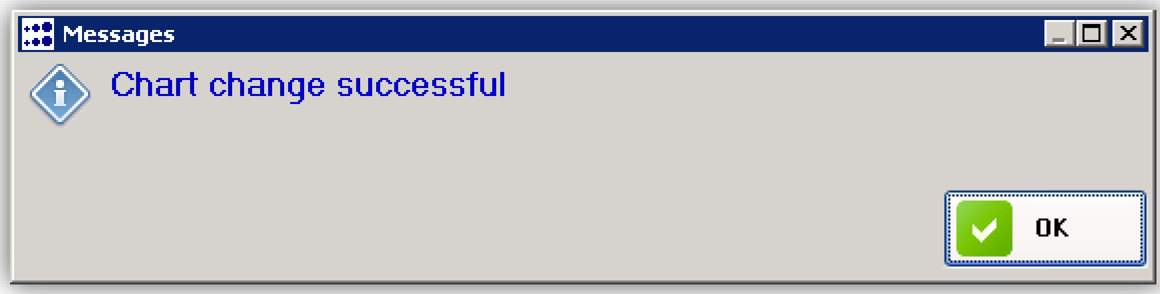


Figure 256 – Change Chart Successful Message

The example below displays chart #1234 (Source) to chart #4567 (Destination). All visits will be moved to chart #4567.

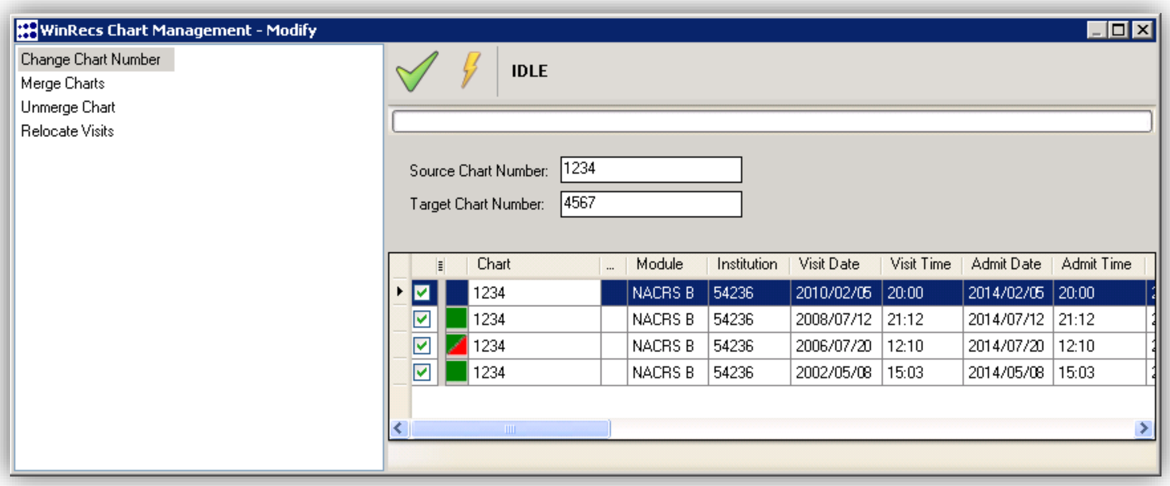


Figure 257 – Change Chart Example

Merge Charts

Used to move all visits from the `Source Chart Number` to the `Target Chart Number`. The `Target Chart Number` will already be in the **CPI MODULE.**

- In the CPI MODULE, do a chart search on the Source Chart Number (the number not being kept)
- Click on **Chart Management/Modify**
- Click on **Merge Charts**
- The `Source Chart Number` will populate with the CPI MODULE number and all the visits will populate below the chart numbers
- Enter the `Target Chart Number` – this number has to be in the CPI MODULE
- Press  or **[F12]** to execute. (If there are charts that have been submitted to CIHI see Submitted Records at the end of this section.)
- A pop up message will state, pressing Yes will continue, No will take you back to the main screen:

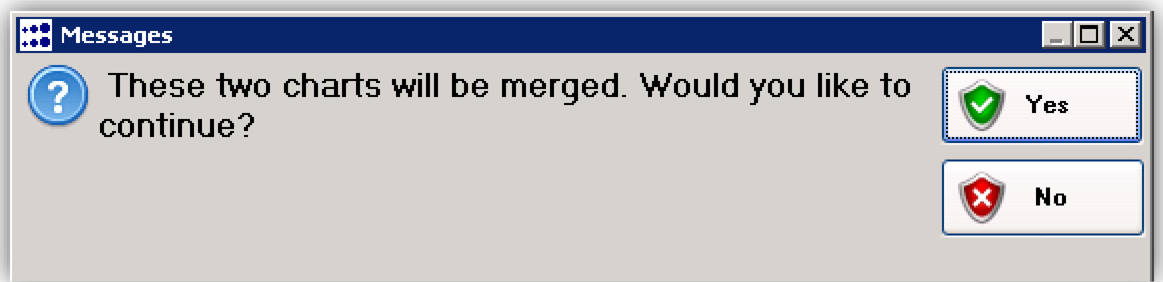


Figure 258 – Merge Chart Message

- A message will pop up stating:

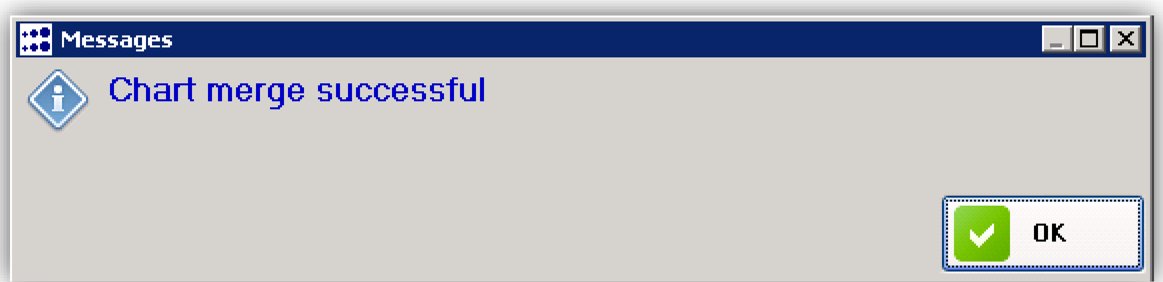


Figure 259 – Merge Chart Successful Message

The example below displays chart *#T5679* (Source) merge to chart *#CF12345678* (Target). All visits will be moved to chart *#CF12345678*.

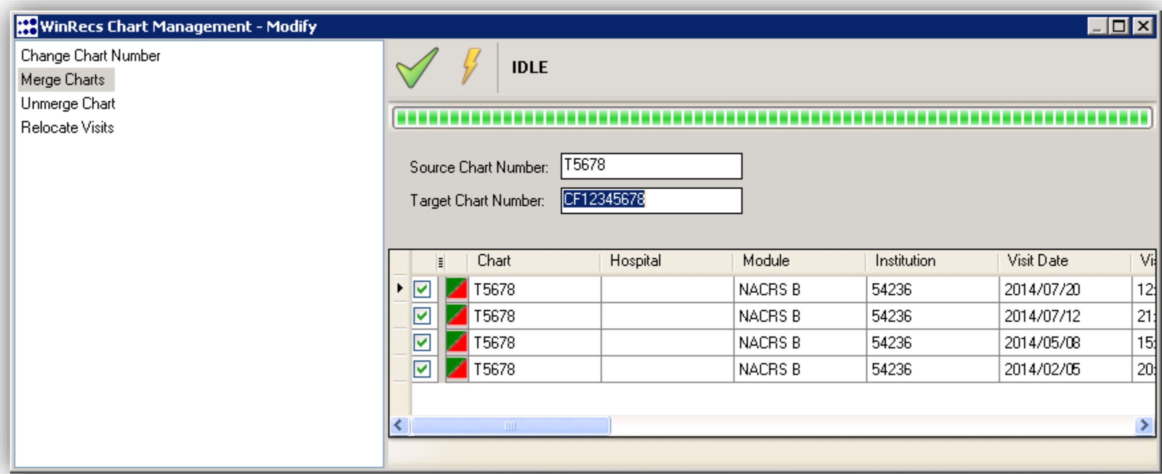


Figure 260 – Change Merge Example

Unmerge Charts
This option will unmerge previously merged charts.

If the following error appears when trying to unmerge charts and the “Chart Number Can be Re-Issued?” in the Hospital Profile needs to be unchecked:

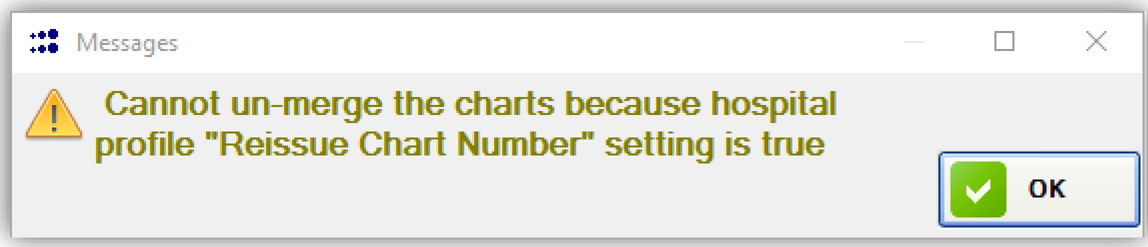


Figure 261 – Un-Merge Charts Error message

Chart Number Can be Re-Issued? – Unchecked:

The Hospital and Regional Profile both have settings for the Module Options, [CPI MODULE] Central Patient Index called “Chart Number Can be Re-Issued?” If this option is checked the unmerge function will not work.

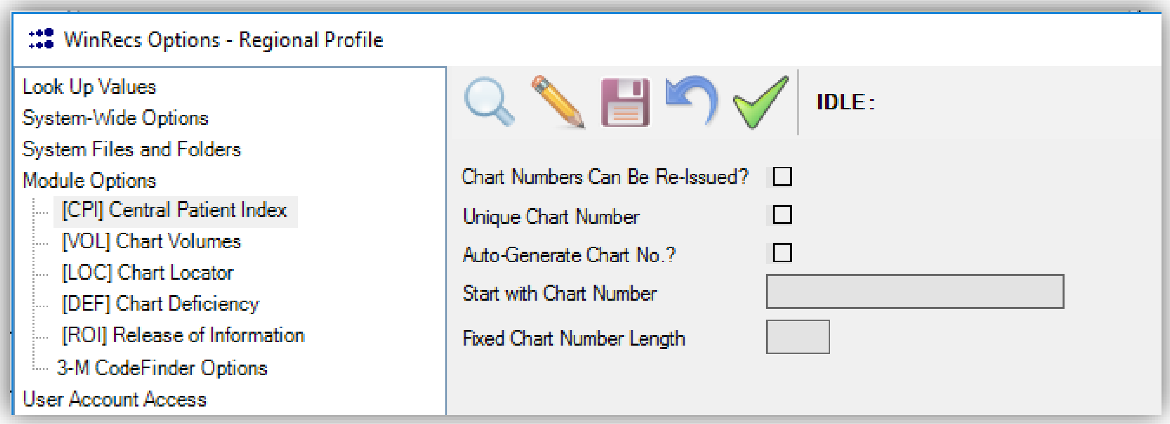


Figure 262 - Options - Regional Profile Setup

In the CPI MODULE, do a chart search on the Target Chart (the number kept)

- In the CPI MODULE, do a chart search on the Source Chart Number (the number not being kept)
- Click on **Chart Management/Modify**
- Click on **Unmerge Charts**
- The Chart Number will populate with the CPI MODULE number and all chart or charts will populate in the Merge List
- Highlight the chart number that you want to unmerge
- Press  or **[F12]** to execute.
- A pop up message will state, pressing Yes will continue, No will go back to the unmerge screen:

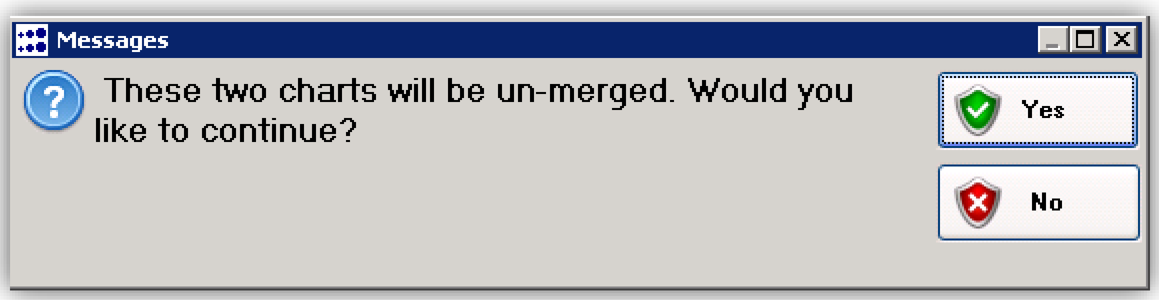


Figure 263 – Change Un-Merge Message

- A message will pop up with the following message.

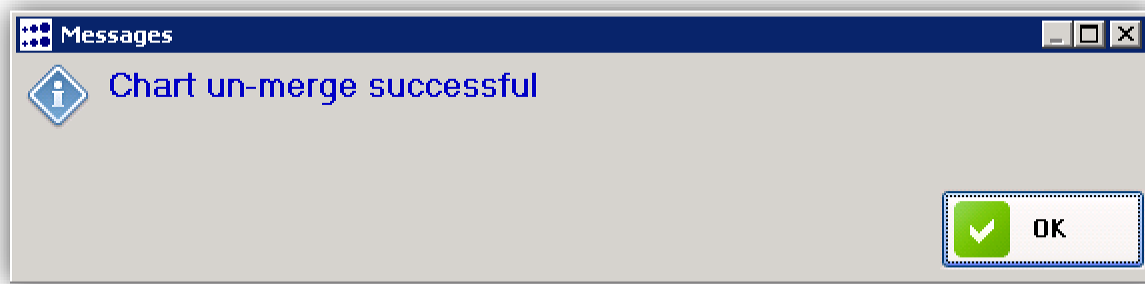


Figure 264 – Chart Un-merge Successful message

In the example below, the chart number that was merged to is *CF12345678*(`Target Chart`), in the **Merge List** the chart number (`Source Chart`) is the chart that merged into the Target Chart. Executing this will unmerge these two charts.

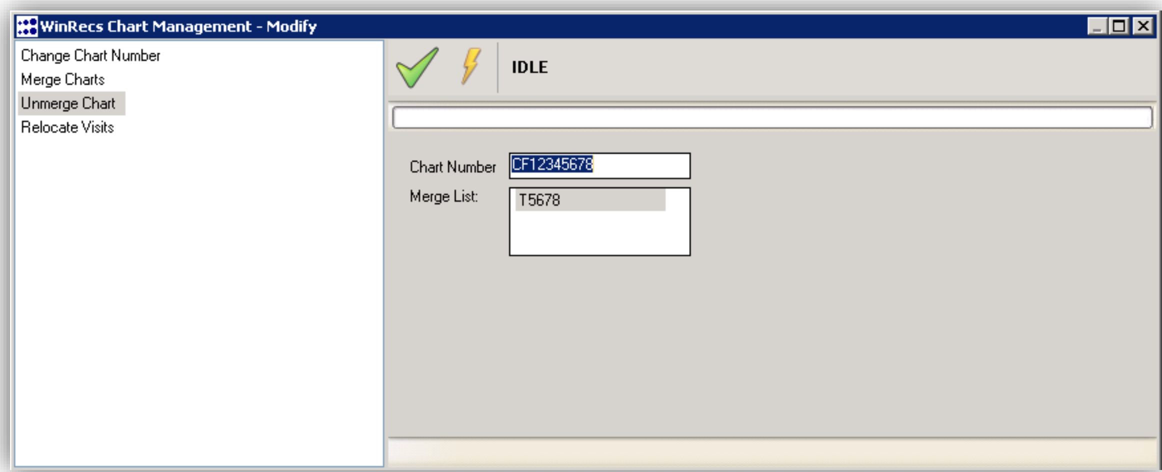


Figure 265 – Chart Un-Merge Example

Relocate Visits

Used to move only selected visits from one chart to another. The `Source Chart Number` will display all visits for the chart. Select the `Target Chart Number` and the selected visits will move to this chart number. This cannot be undone.

- In the **CPI MODULE**, do a chart search on the `Source Chart Number` (the number you want to move the visit(s) from)
- Click on **Chart Management/Modify**
- Click on **Relocate Visits**

- The `Source Chart Number` will populate with the CPI MODULE number and all visits related to that chart number will populate below.
- Enter the `Target Chart Number`
- Put a check mark by the visits that need to be moved from the Source Chart to the Target Chart.
- Press  or **[F12]** to execute. (If there are charts that have been submitted to CIHI see Submitted Records at the end of this section.)
- A pop up message will state, pressing Yes will continue, No will go back to the unmerge screen:

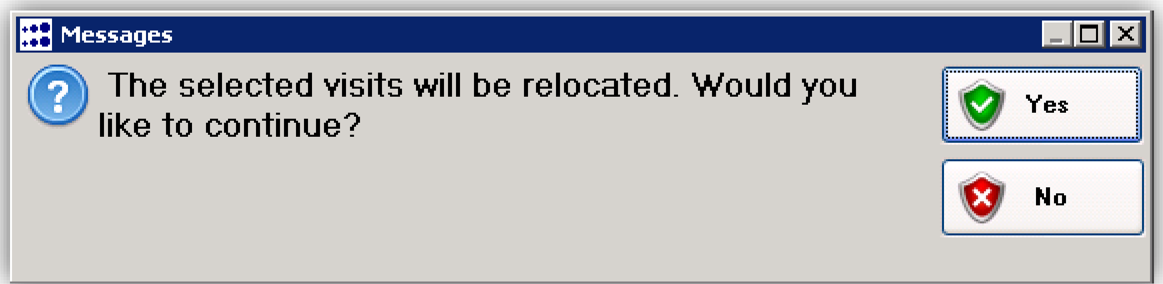


Figure 266 – Relocate Visits Message

- A message will pop up with the following message.

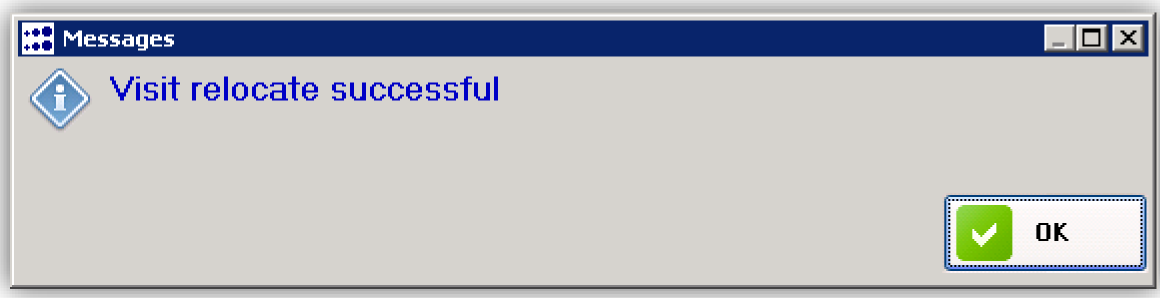


Figure 267 – Relocate Visits Successful Message

In the example, below the Source chart is 165557, the visit from 2015/04/10 is check marked and will be moved to the Target Chart Number 99165.

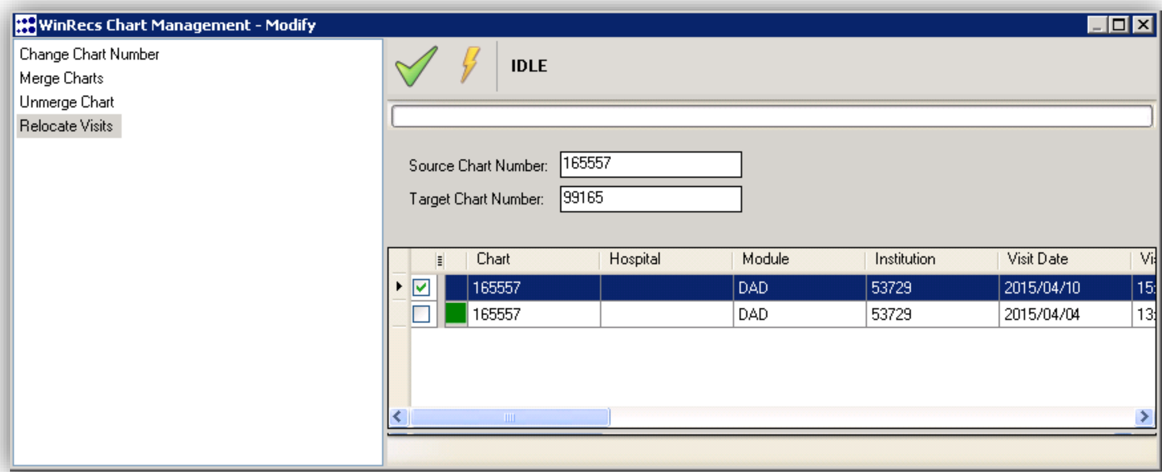


Figure 268 – Relocate Visits Example

CPI Lock

CPI Lock clears any locks that may be caused by merge/unmerge functions

To Activate Clear CPI Lock functions:

- Options/User Profile/Module Settings/CPI/Clear CPI Lock

To clear a locked record in the CPI Module:

- Chart Management in the CPI Module
- Click on “Clear CPI Lock” option. (To activate this option, go to Options/User Profile/Module Settings/CPI/Clear CPI Lock)

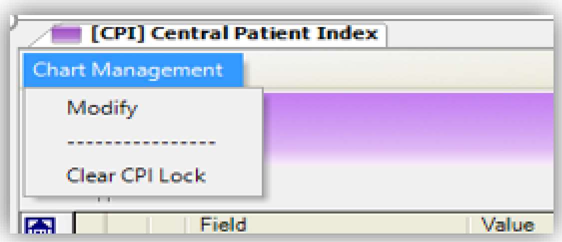


Figure 269 - Chart Management Menu

- The following message will appear

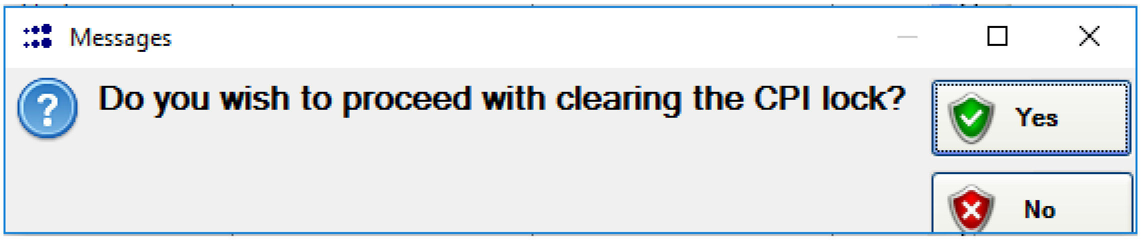


Figure 270 - Chart Clear CPI MODULE Lock message

- Select yes to continue or no cancel the request.
- If user selects yes, the following message appears:

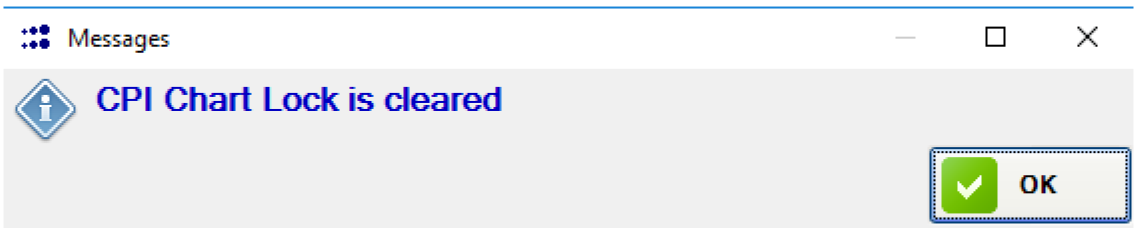


Figure 271 - Chart Clear CPI MODULE Lock Completed message

6.1.2 [VOL] Chart Volumes Module

The Chart Volumes module records and displays all the volumes of a specific chart.

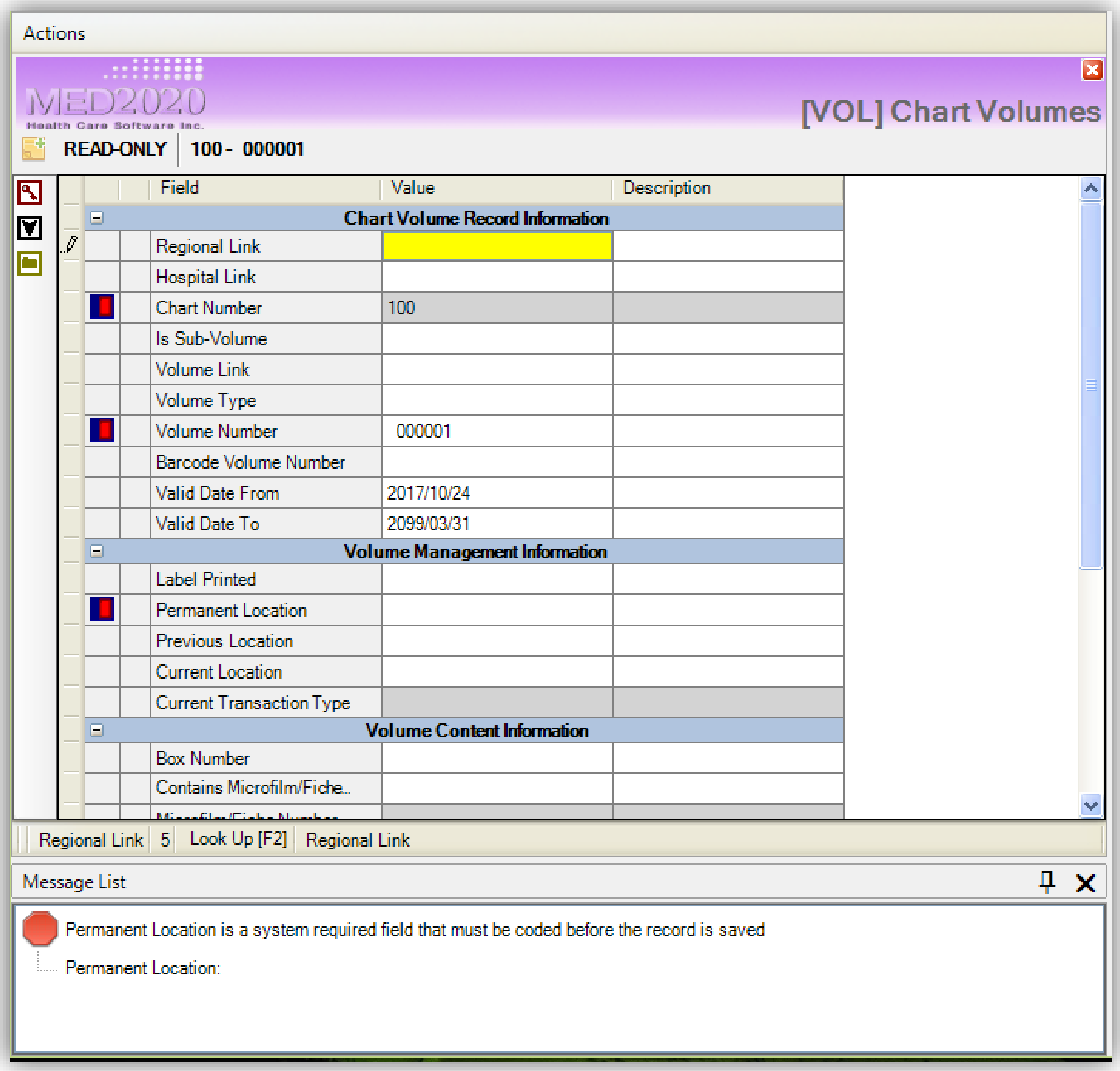


Figure 272 – Chart Volumes Module

The Chart Volume Module is broken up into 3 sections:

1. **Chart Volume Record Information** – Describes the volume of the record and what visit dates are included in the volume
2. **Volume Management Information** – Describes where the volume is located
3. **Volume Content Information** – Describes what is contained within in each volume

Creating a new Volume

- Go to WinRecs Module Menu or on the Menu Bar go to Module/Chart Maintenance/[VOL] Chart Volume
- Press  or **[F5]** to create a new volume
- Record Search window will pop up – enter the chart you would like to create a volume and press Find Chart or press Enter and select your chart.

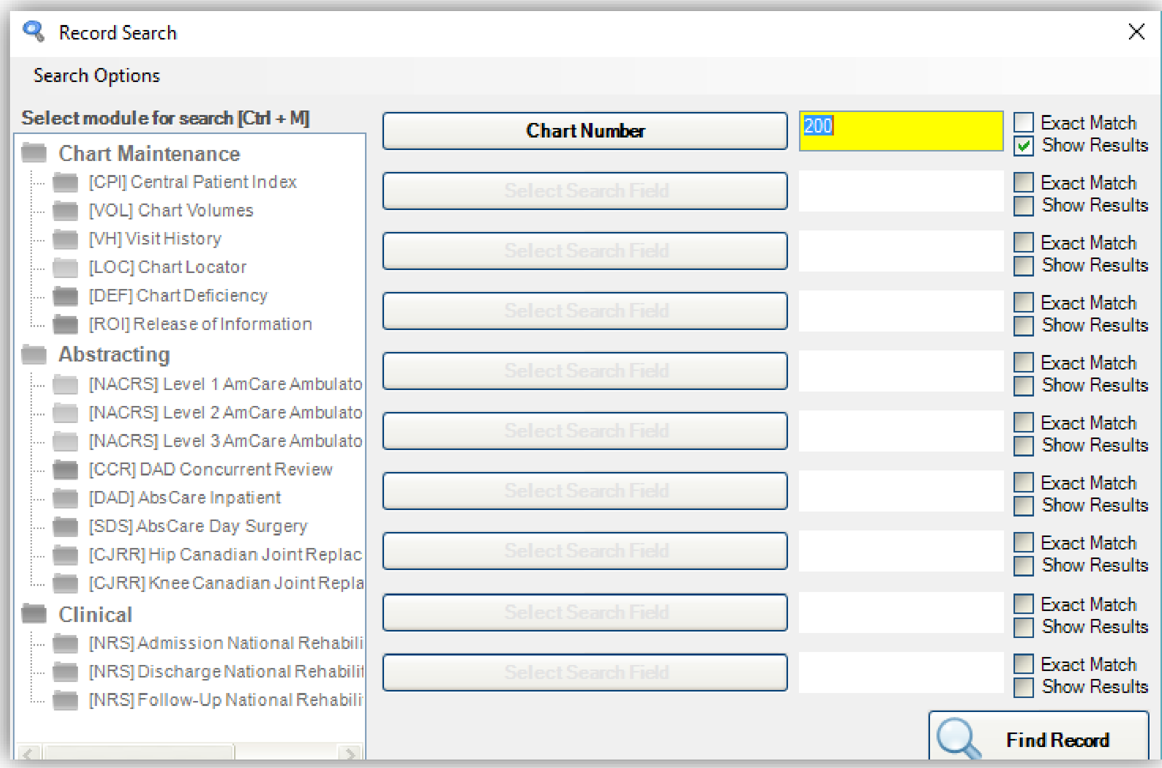


Figure 273 – Chart Volumes Record Search for New Volume

- **Chart Volume Record Information** enter the information pertaining to your volume
  - `Regional Link` – Enter or will populate if using a regional system
  - `Hospital Link` – Enter or will populate if using a regional system
  - `Chart Number` – automatically populates
  - `Is Sub-Volume` – ‘Y’ or ‘N’ field – Yes if there are sub-volumes of this volume, N or leave blank if there are no sub-volumes
  - `Volume Link` –
  - `Volume Type` – Press **[F2]** for the options: 1. Temporary or 2. Permanent

- `Volume Number` – This is a mandatory field and need to be entered.
- `Barcode Volume Number` –
- `Valid Date From` – The date the volume starts (visit date or admission date)
- `Valid Date To` – The date the volume ends (visit date or discharge date of last visit) For current charts – leave blank or future date (2099/03/31)

- **Volume Management Information**
  - `Label Printed` – Y – Yes, N- No, P-Pending
  - `Permanent Location` – This is mandatory field – Press **[F2]** for look up or type in location. Look Up Fields can be added via Look Up Maintenance/Chart Locator/Loan Locator
  - `Previous Location` – Linked to Chart Locator, displays the previous location the chart was signed out to
  - `Current Location` – Linked to Chart Locator, displays were the chart is currently signed out to.
  - `Current Transaction Type` – Linked to Chart Locator – displays the most **current transaction type as displayed in Chart Locator.**
- **Volume Content Information** – additional information if required but not mandatory
  - `Box Number` –
  - `Contains Microfilm/Fiche Data` – Y or N
  - `Microfile/Fiche Number` – the number associated with the Microfile/Fiche
  - `Contains Digital Data` – Y or N
  - `Contains DAD (Inpatient) Data` – Y or N
  - `Contains SDS Data` – Y or N
  - `Contains NACRS Data` – Y or N
  - `Contains NRS Data` – Y or N
  - `Contains MDS (CCRS) Data` – Y or N
  - `Contains MHRS Data` – Y or N
  - `Contains CJRR Data` – Y or N
  - `Contains Cancer Care Data` – Y or N
  - `Contains Outpatient Data` – Y or N
  - `Volume Note` – Ability to collet any note by clicking on the . A pop up screen will display type the note, press Select. To edit the note double click on the field.
- Once the required fields are completed, press **[F6]/[F7]** to save.

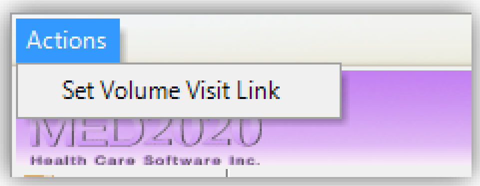
Editing a Volume

- Press  or **[F4]** to bring up the Record Search Box
- Enter your search parameters in the box and press Enter or Find Record
- A Search Result Box will display, highlight the record you want to pick and press Select Record and the record will populate the Chart Volumes module.
- Edit as required and press **[F6]/[F7]** to save.

Volume Visit Link

This feature gives the user the ability to link visits to the volume. When a user is looking for a chart, a report can be run and it will display which volume the visit is in and were the chart is located.

- Go to Chart Volumes module
- Search for the chart number and volume
- Go to Actions/Set Volume Visit Link



- The following will populate:

Chart Volume Visit Link - add when tested by QA

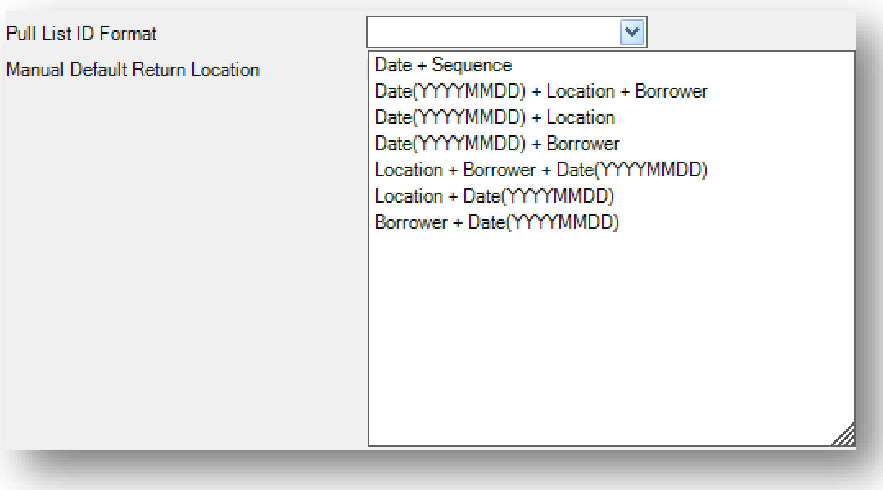
6.1.3 [LOC] Chart Locator

The chart locator module is used for tracking and locating the paper copy of the patient record. Using the key identifier fields entered into the patient record in other modules the chart location can provide an up to date report on the chart's location within the facility.

Chart Locator Set up

The following setup must be completed or reviewed before using the Chart Locator module:

- **Regional/Hospital Profile** – Check the Module Options/[LOC] Chart Locator fields for configuration
  - Module Options→[LOC] Chart Locator
  - Pull List ID Format-When a Pull List is created, have an options to configure the format as:



- Manual Default Return Location-When the box is checked and chart is returned to Health Records, user can manually select from a list of Health Records locations
- **Look Up Code Maintenance** – Look up fields under the [LOC] Chart Locator are configured
  - Loan Hospital
  - Loan Location
  - Loan Location Type
  - Request Priority
- **User Profile** – Check Module Settings/[LOC] Chart Locator – set the permissions for Chart Locator
- **Control File** – set the appropriate default setting, as well as disable, enable fields as required

Accessing Chart Locator

WinRecs Module Menu → Chart Maintenance → [LOC] Chart Locator

- Or -

Modules → Chart Maintenance → [LOC] Chart Locator

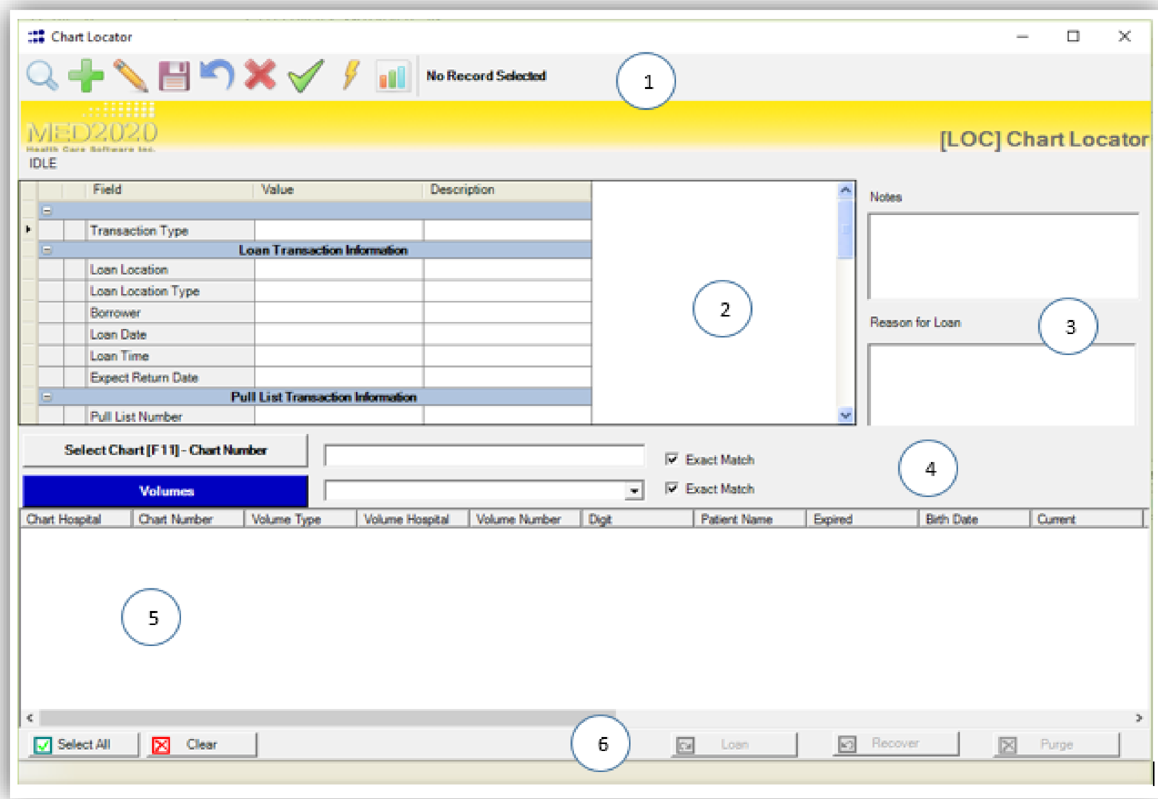
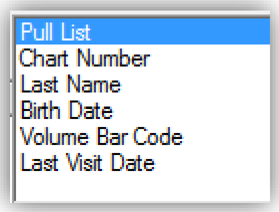


Figure 274 – Chart Locator Module

1. **Tool Bar** – see Tool Bars
2. **Transaction Information** – The Section included in this area are:
   - Transaction Type – there are 6 transaction types and depending on the type you choose will determine which sections will display
     - **Loan Transaction Information**
     - **Pull List Transaction Information** – fields in this section are only be available if Transaction Type – Pull List is chosen
     - **Return Transaction Information** – fields in this section are only available if Transaction Type – Return is chosen
     - **Mass Move Transaction Information** – fields in this section are only available if Transaction Type – Mass Move is chosen
     - **Request Header Information**
3. **Notes and Reason for Loan** – free text field for user to enter notes
4. **Select Chart & Volumes**
   - Select Chart **[F11]** – Clicking on this or pressing **[F11]** will give you the following options to search for a record:



5. **Chart Information** – This represents the charts that have been signed out:
    - Chart number in Blue indicates there is an outstanding request for this chart
    - Chart number in Red indicates the chart is out on loan
    - Chart number in Purple indicates the chart is already signed out to the location chosen
6. **Tool Buttons**

Chart Request Transaction

Ability to request a chart that is currently out on loan. On the chart's return a notice will be create to notify of the user of the new location.

- To create a new Chart Request, press the  or **[F5]**
- Enter `Transaction Type C- Chart Request` – the Request Header Information field will be displayed
    - `Request Location` – Press **[F2]** to choose the location the chart is going - mandatory
    - `Request Location Type` – is linked to the Request Location
    - `Request Borrower` – identifies the borrower (a specific person) for the Request Location
    - `Request Date` – The date auto populates – mandatory
    - `Request Time` – The time auto populates - mandatory
    - `Request Priority` – Press **[F2]** to chose - Request priorities are set up in Maintenance/Look Up/[LOC] Chart Locator/Request Priority
- Under Select Chart – Choose chart number (or whatever search that is chosen)
- Enter the chart number being requested, if the chart only has one volume press enter and the chart will display in the information box. If there is more than one volume a pop up screen will populate with the chart and volumes:

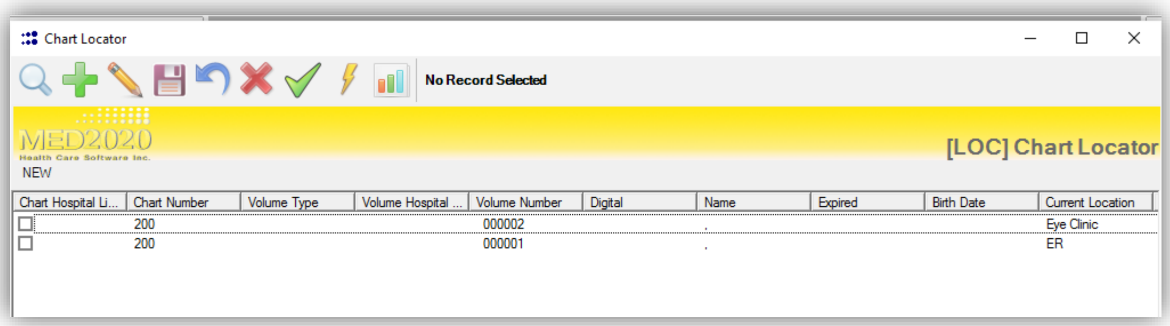


Figure 275 – Chart Locator Volume Screen

- Put a check mark in the chart you would like to select and press Enter
- This will populate in Chart Information Box

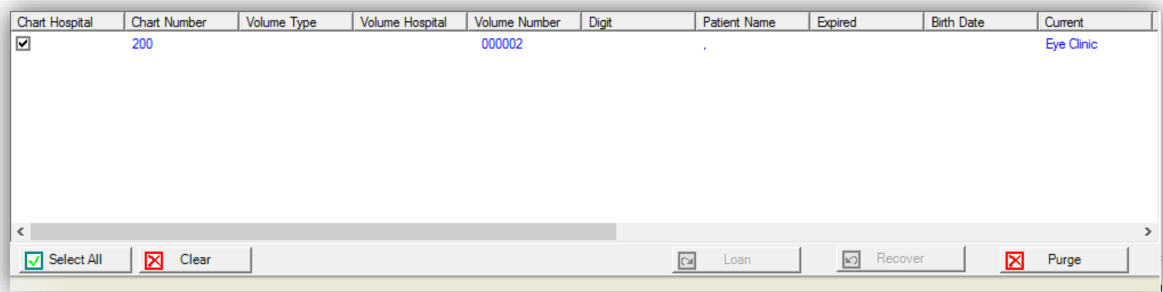


Figure 276 – Chart Locator Chart Information Box

- Press  or [F7] to save.
- When the chart if returned from the current location the following message will prompt when you return it:

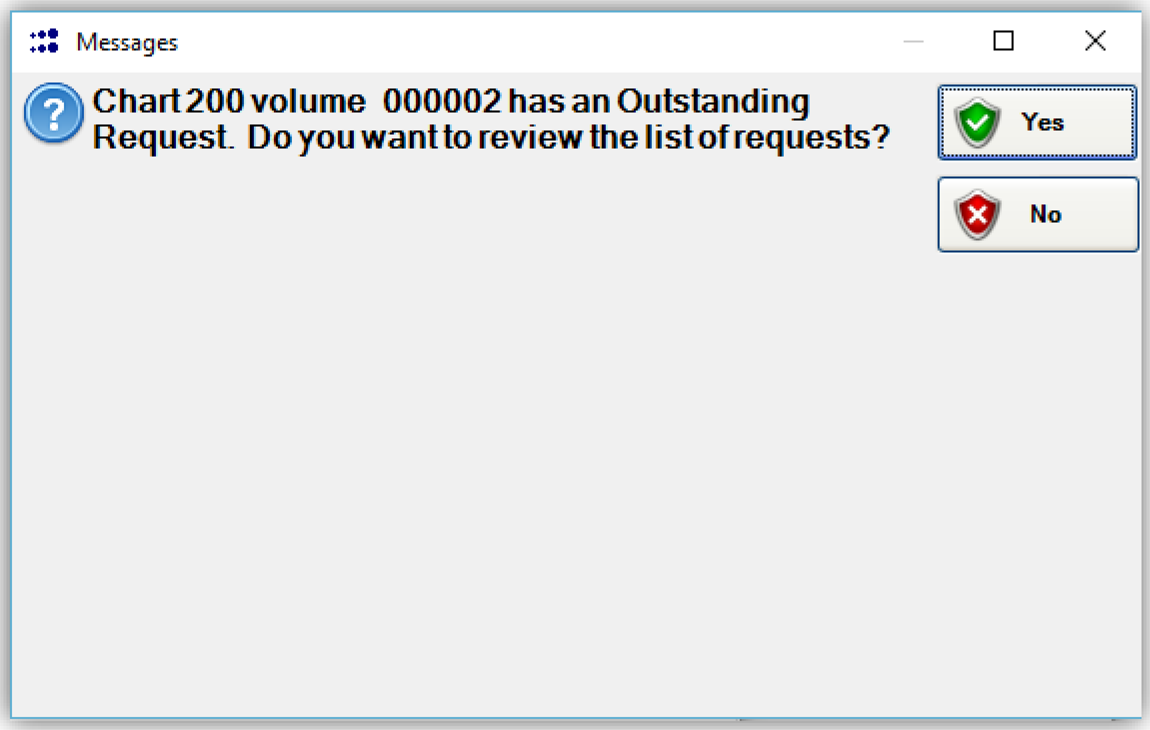


Figure 277 – Chart Locator – Outstanding Request

- Select Yes to view and the following window pops up:

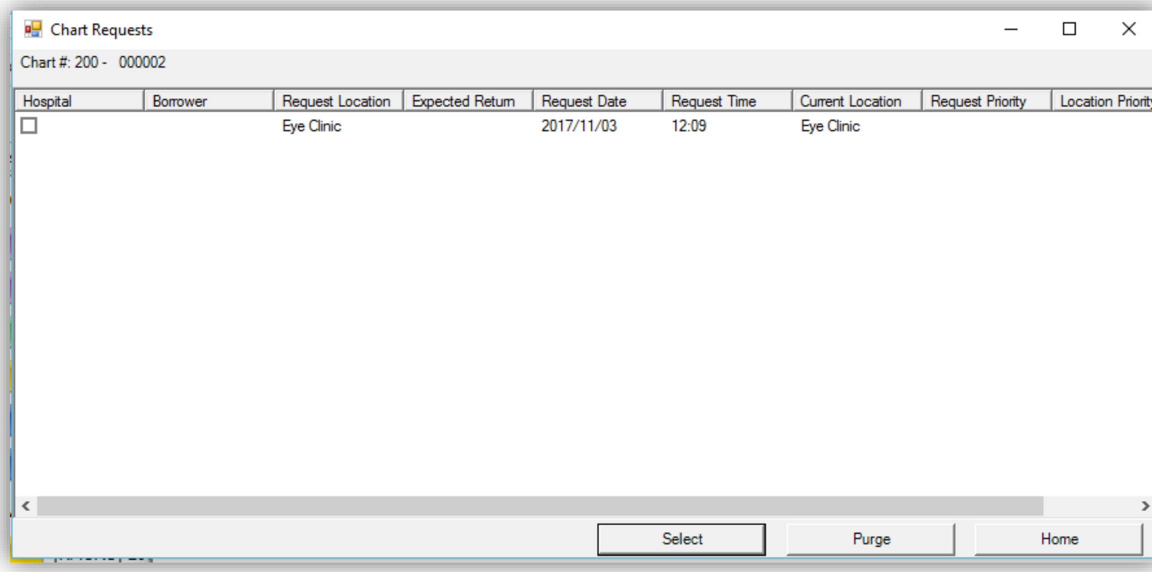


Figure 278 – Chart Locator – Chart Requests

- To move it to the `Request Location`, enter the check mark and press **Select** and the chart will be moved to the requested location.
- To remove the request, enter the check mark and press **Purge**

Loan Transaction

Ability to loan charts out to different areas within the department or facility.

- To create a new Loan Transaction, press the  or **[F5]**
- Enter `Transaction Type L- Loan` - the Loan Transaction Information header will be displayed
  - `Loan Location` – press **[F2]** to choose the location the chart is going – mandatory
  - `Loan Location Type` – is linked to Loan Location
  - `Borrower` – the person that is linked to that location
  - `Loan date` – The date the loan -automatically populated – mandatory
  - `Loan time` – the time of the loan – automatically populated – mandatory
  - `Expected Return Date` – The date the chart is expected to return. This is determined in the Look-up for Loan Location.
- Under Select Chart – Choose chart number (or whatever search that is chosen)
- Enter the chart number being requested, if the chart only has one volume press enter and the chart will display in the information box. If there is more than one volume a pop up screen will populate with the chart and volumes:

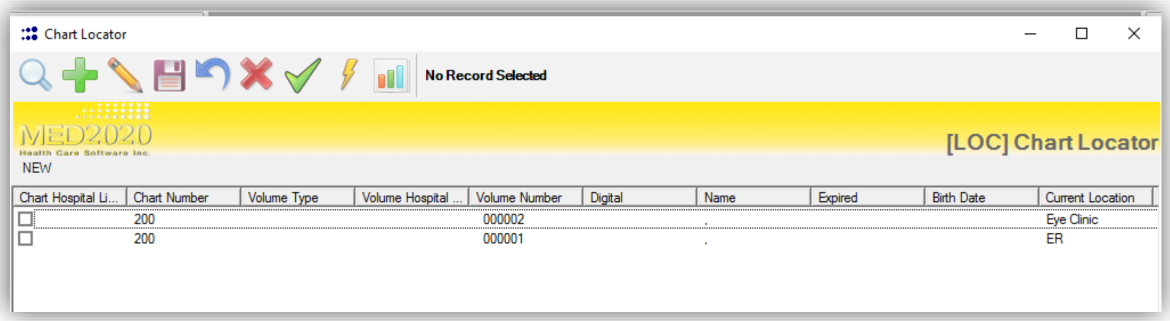


Figure 279 – Chart Locator Volume Screen

- Put a check mark in the chart you would like to select and press Enter
- This will populate in Chart Information Box

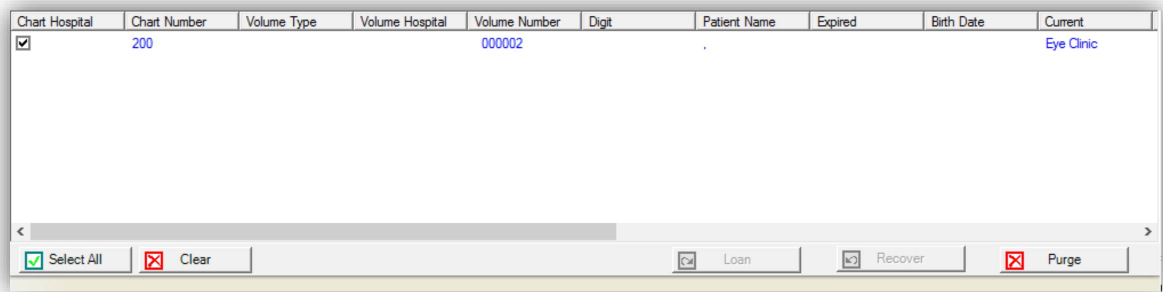


Figure 280 – Chart Locator Chart Information Box

- Press  or [F7] to save.

Mass Move Transaction

Used to move a large number of charts to a new location

- To create a new Mass Move, press the  or **[F5]**
- Enter `Transaction Type M- Mass Move` - the Mass Move Transaction Information header will be displayed
  - `Move Location` – press **[F2]** to choose the location the chart is currently at – mandatory
  - `Move date` – Auto populates the date – mandatory
  - `Loan time` – Auto populated the time – mandatory
  - `New Perm Location` – press **[F2]** to choose the new location - mandatory
  - `Box Number` – enter the box number if the chart is in the box

- Under Select Chart – Choose chart number (or whatever search that is chosen)
- Enter the chart number being requested, if the chart only has one volume press enter and the chart will display in the information box. If there is more than one volume a pop up screen will populate with the chart and volumes:

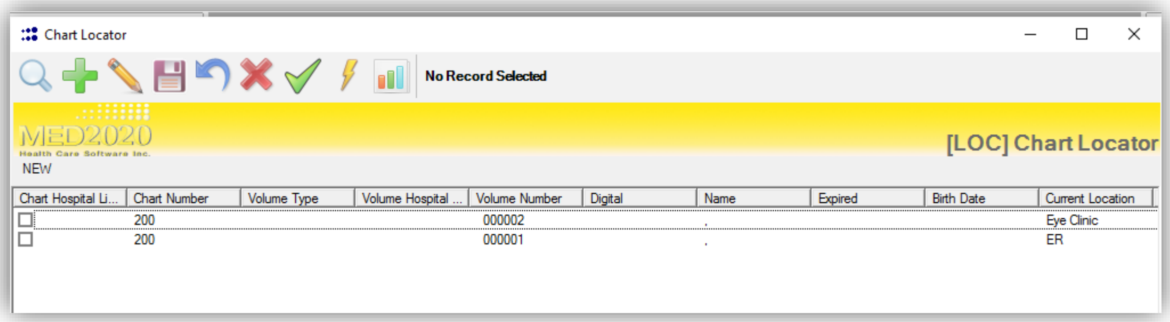


Figure 281 – Chart Locator Volume Screen

- Put a check mark in the chart you would like to select and press Enter
- This will populate in Chart Information Box

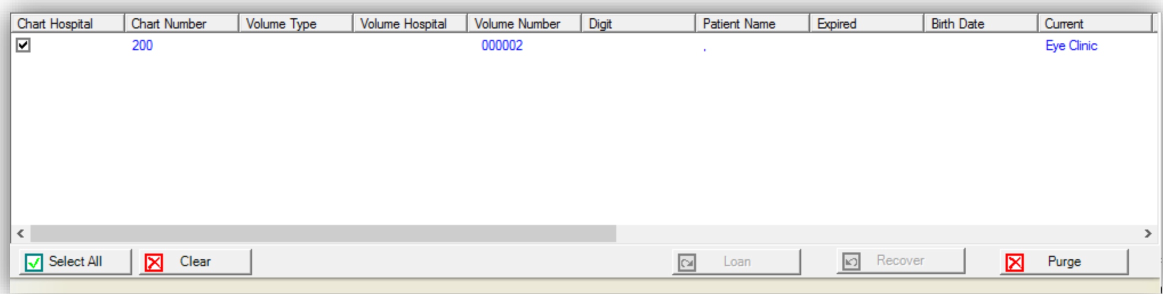


Figure 282 – Chart Locator Chart Information Box

- Press  or [F7] to save.

Pull List Transaction

Used to create pull lists for clinics, etc. Can be created manually or a Batch Interface.

- To create a new Pull List, press the  or **[F5]**
- Enter `Transaction Type P- Pull List` – the Pull List Transaction Information header will be displayed

- `Pull List Number` –auto populates with a Pull List Number – mandatory
- `Request Location` – Press **[F2]** to choose the location – mandatory
- `Request Location Type` – is linked to the Request Location and will populate
- `Borrower` – the person who is borrowing the charts (if known)
- `Request Date` – Auto populates the date – mandatory
- `Request Time` – Auto populated the time – mandatory
- `Request Priority` – Press **[F2]** to chose the priority if desired
- `Pull Date` – Auto populates the date but can be changed if date is different
- `Pull Time` – Auto populated the time but can be changed it time is different
- `Expect Return Date` – The date auto populated the expected return based on request location

- Under Select Chart – Choose Chart Number
- Enter the chart number being requested, if the chart only has one volume press enter and the chart will display in the information box. If there is more than one volume a pop up screen will populate with the chart and volumes:

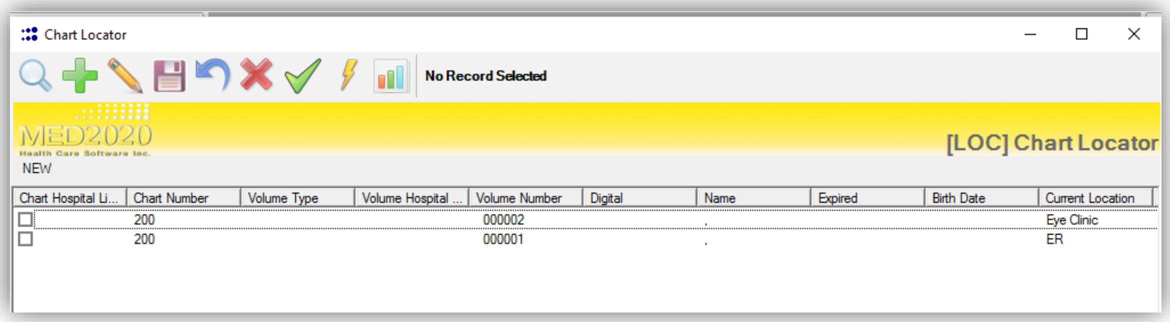


Figure 283 – Chart Locator Volume Screen

- Put a check mark in the chart you would like to select and press Enter
- This will populate in Chart Information Box

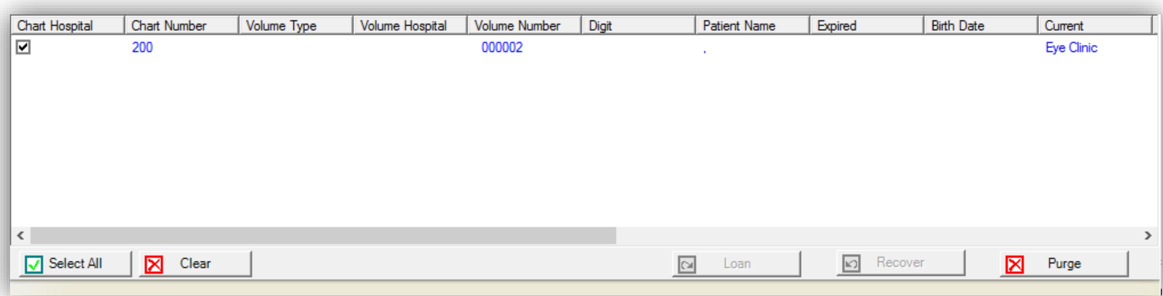


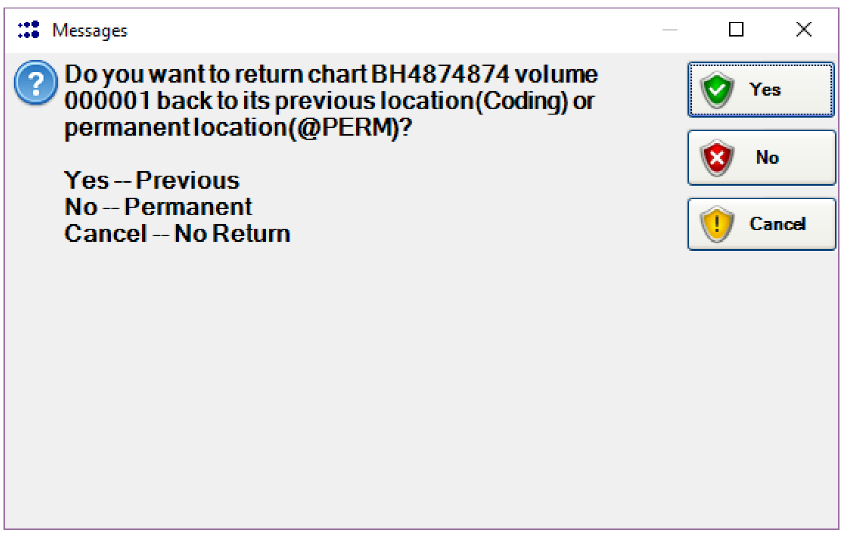
Figure 284 – Chart Locator Chart Information Box

- Press  or **[F7]** to save.

Return Transaction

Used to return loaned charts to either the previous location or the chart's designated permanent location.

- To create a new Return, press the  or **[F5]**
- Enter `Transaction Type R-Return` - the Return Transaction Information header will be displayed
    - o `Return Location` – press **[F2]** to choose the location the chart is being returned to
    - o `Cursor will jump to Return Location to select from a list of internal locations.`
- If Return Location is blank, user can select the charts to be returned and locator will determine if chart will be returned to Previous Location or Permanent Location. If chart was in a previous location that was NOT permanent, a prompt will display.



- Under Select Chart – Choose chart number (or whatever search that is chosen)
    - Enter the chart number being requested, if the chart only has one volume press enter and the chart will display in the information box. If there is more than one volume a pop up screen will populate with the chart and volumes:

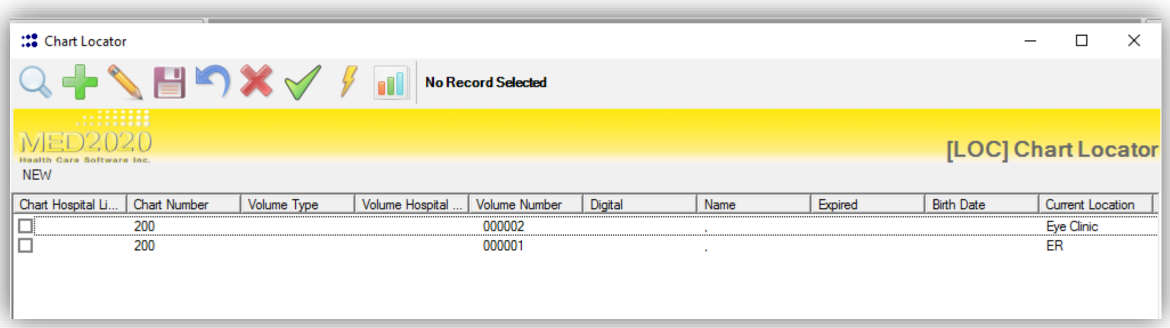


Figure 285 – Chart Locator Volume Screen

- Put a check mark in the chart you would like to select and press Enter
- This will populate in Chart Information Box

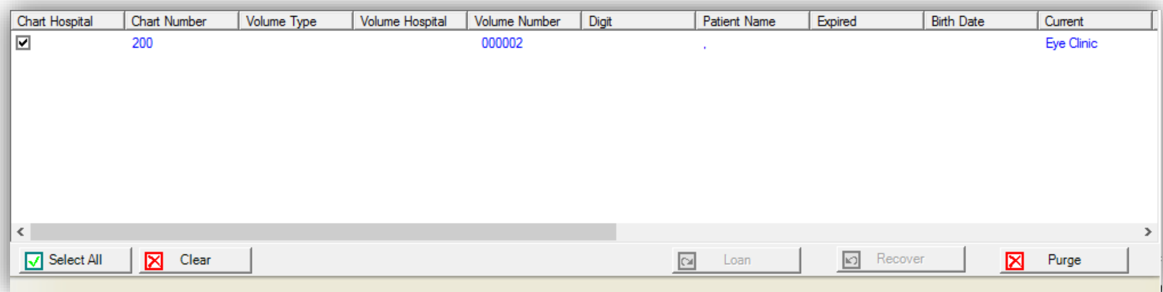


Figure 286 – Chart Locator Volume Screen

- Press  or **[F7]** to save.

Cancel Transaction

The ability to cancel transaction created in error and return the chart to the previous location.

- To create a new Return, press the  or [F5]
- Enter `Transaction Type X-Cancel`
- Under Select Chart – Choose chart number (or whatever search that is chosen)
  - Enter the chart number being requested, if the chart only has one volume press enter and the chart will display in the information box. If there is more than one volume a pop up screen will populate with the chart and volumes:

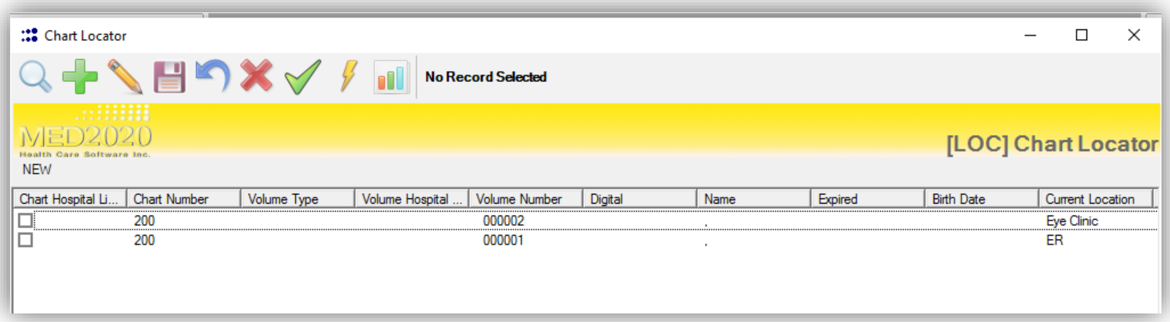


Figure 287 – Chart Locator Volume Screen

- Put a check mark in the chart you would like to select and press Enter
- This will populate in Chart Information Box

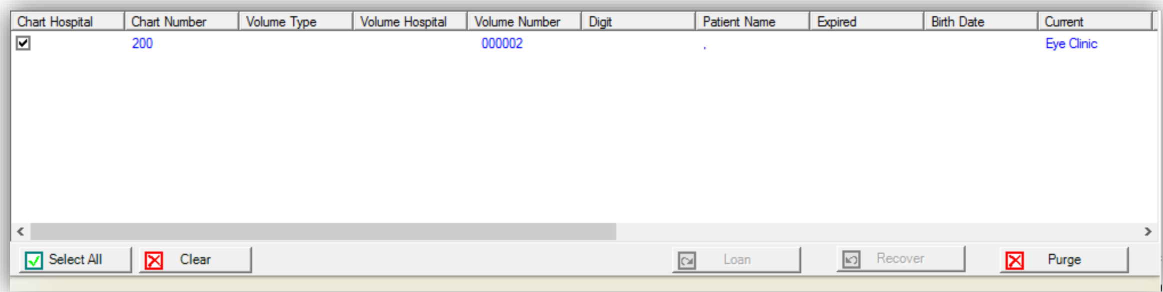
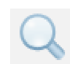


Figure 288 – Chart Locator Chart Information Box

- Press  or [F7] to save.

Updating Pull List Transactions

- To add records or update a Pull List transaction, press the  or **[F4]**
- The record search window will display and the list of search options are displayed in the window:

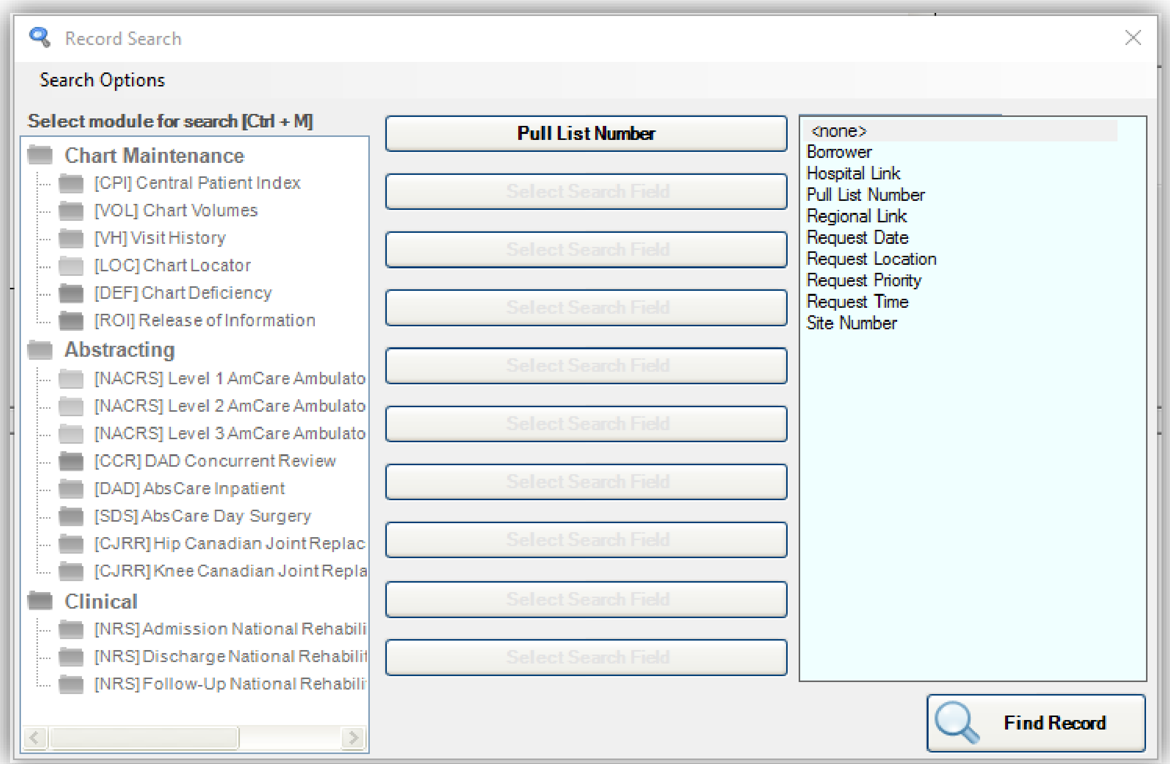


Figure 289 – Chart Locator Record Search

- Choose the search option and enter the required information.
- Depending on the search option, if there is more than one option a search results page will display with the pull lists associated with that search. Highlight the search and press Select Record.

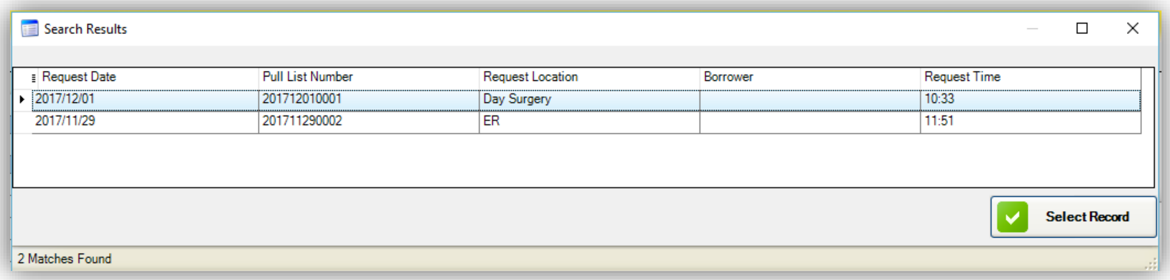


Figure 290 – Chart Locator Search Results

- Press  or [F7] to save.

6.1.4 [DEF] Chart Deficiency

Overview

The Chart Deficiency module provides Health Information Management (HIM) departments the ability to track all activity required to complete a patient's chart.

Once a chart is returned to the HIM department, it is collated, sorted and analyzed to determine if any deficiencies exist. These can be entered quickly and easily via the Chart Deficiency module – either manually or using bar code technology. WinRecs generates a deficiency letter per delinquent visit.

As the physician(s) completes the deficient items, the chart can be updated in one of several ways:

- If only some deficiencies are complete, those individual items can be entered and new deficiency letter printed, showing only the outstanding deficiencies
- If all deficiencies are completed by a physician, the physician number can be entered, and all charts will be updated to a status of "C" (Complete). If the physician has completed all items, only one reference number must be entered.

Main Features

- Deficiency codes are profile driven (Please refer to Look Up Code Maintenance).

- Bar Code Technology allows for quick and accurate entry of key information, as well as quick removal of completed deficiencies.
- Delinquent count is done electronically.
- Printing the Deficiency Letter by Provider/Visit Date once the entry has been completed and saved.
- Deficiency Color code tabs can be assigned to each provider for easy identification of where deficiencies are noted within the chart. The colors can be printed on the deficiency letter. Each provider will have a different colored table to denote their deficiencies.

Chart Deficiency Set Up

The following set up must be completed before using the Chart Deficiency module:

- **Regional/Hospital Profile**: Completion of Module Options/[DEF] Chart Deficiency fields
  - Deficiency Add Days-When deficiency are created, to determine when to start counting the deficiency days. Example: 1 means to start counting deficiency days tomorrow
  - Minimum Deficiency Count-minimum number of deficiencies for a letter to be generated
- **Control File:** Enabling, Disabling, making fields Visible moving of fields around the Chart Deficiency module
- **Provider Maintenance:** Check Chart Deficiency area and ensure appropriate fields are completed such as language and address fields
  - Provider Status
  - Current Provider Level
  - Last Level Letter Issue
  - Last Level Letter Date
  - Resident
  - Max Deficiency Level
  - Minimum Deficiencies
- **Look Up Code Maintenance**: Look up fields under the [DEF] Chart Deficiency are configured
  - Colour Code
  - Deficiency Code
  - Deficiency Code Type
  - Header Status (Level)
  - Message Box
  - Resident

- **Deficiency Letters:** Letters are created using the Report Generator module.

Accessing Chart Deficiency

WinRecs Module Menu → Chart Maintenance → [DEF] Chart Deficiency

- Or -

Modules → Chart Maintenance → [DEF] Chart Deficiency

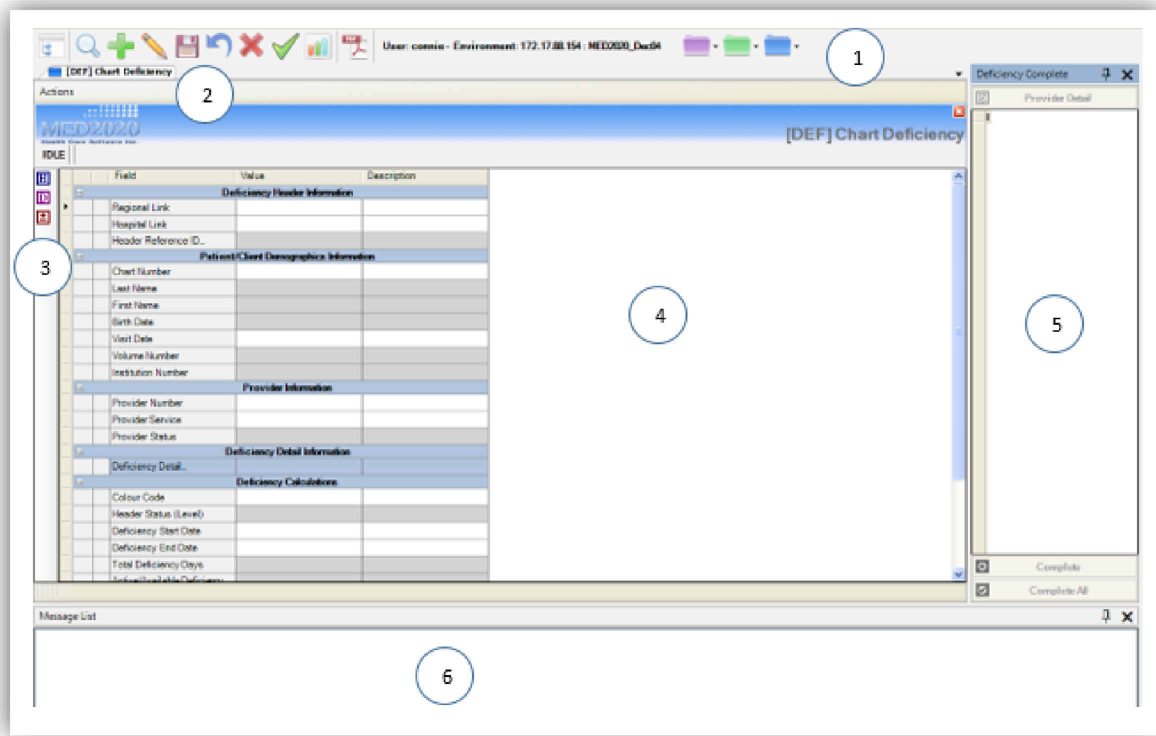


Figure 291 – Chart Deficiency Module

1. **Tool Bar** – see Tool Bars
2. **Actions –**
    - Deficiency Letters
    - Calculate Deficiency Days
    - Batch Complete
    - Transfer – transfer the deficiency to a different provider
    - Incomplete
    - New Provider [F8]
3. **Bookmarks** – Quick links to the Section Headers
    - - Deficiency Header Information – main grid
    - - Deficiency Detail Information - multiform
    - - Deficiency Calculations

4. **Transaction Information** – The Sections included in this area are:
   - **Deficiency Header Information** -
   - **Patient/Chart Demographics Information**
   - **Provider Information**
   - **Deficiency Detail Information**
   - **Deficiency Calculations**
5. **Deficiency Complete** – this area displays the deficiencies that have been created and where you go to complete them. Can also access the Provider Maintenance module by clicking on Provider Detail.
6. **Messages** – displays a message of any fields that need to be entered, the fields will disappear as they are filled in

Creating a Chart Deficiency

- Open up Chart Deficiency module and the Record Search window pop up, enter the chart number (or whatever type of search)
- To create a new Chart Deficiency, press the  or **[F5]**
- **Deficiency Header Information**
  - o `Regional Link` – will populate if user is assigned to Regional Link, can press **[F2]** to look up
  - o `Hospital Link` – will populate if user is assigned to Hospital Link, can press **[F2]** to look up
  - o `Header Reference ID Number` – mandatory - a unique identifier for each deficiency. This is automatically entered.
- **Patient/Client Demographics Information**
  - o `Chart Number` – mandatory - enter the Chart Number or press **[F2]** to search for the chart
  - o `Last Name` – populates the patient last name
  - o `First Name` – populate the patient first name
  - o `Birth Date` – populates the patient birthdate
  - o `Visit Date` – this will be the date of the visit that is deficient, will populate with most recent visit. Press **[F2]** to look up other visits and double click on the visit.
  - o `Volume Number` – provides a link to all charts for a patient. The volume indicates the hospital where the patient has a chart, where the chart is currently located at each hospital, the volume type, and the date the chart starts and ends. To select a different volume, press **[F2]** to display the volume look up and select a volume. If a volume is not displaying, update the chart in the Chart Volumes module.
  - o `Institution Number` – the Institution Number associated with Visit Date
- **Provider Information**

- `Provider Number` – mandatory – a unique identifier for each provider, press **[F2]** to display the list of providers. If the first few letters of the provider name or number is entered, press [F2] will display only those providers matching what was entered.
- `Provider Service` – will populate the service of the provider can press **[F2]** to change if provider has more than one service
- `Provider Status` – will populate the status from Provider Maintenance, Unavailability multiform.

- **Deficiency Detail Information** – this multiform allows the user to assign one or more deficiencies to the provider

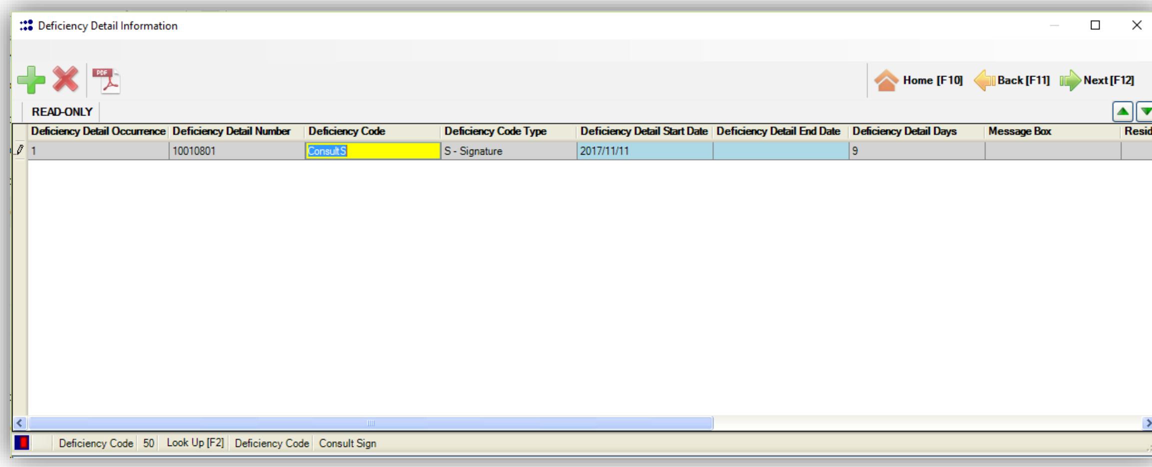
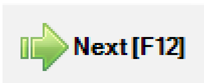


Figure 292 – Chart Deficiency – Deficiency Detail Information

- `Deficiency Detail Occurrence` – automatically populates with the occurrence number
- `Deficiency Detail Number` – automatically populates the number
- `Deficiency Code` – mandatory – enter the deficiency code or press **[F2]** to look up the code.
- `Deficiency Code Type` – automatically populate the code type attached to the Deficiency Code
- `Deficiency Start Date` – automatically populates today's date
- `Deficiency End Date` – automatically populates when the deficiency is complete
- `Deficiency Detail Days` – calculated fields of the number of day the deficiency has been deficient
- `Message Box` – any comments
- `Resident` – populated if the provider is a resident populated from Provider Maintenance
- `Completed By` – the user who completed the deficiency
- `Detail Status` – the status of the deficiency.
- `Job Number` – can enter the job number
- `Detail Comments` – free text field to enter comments

- To create a new deficiency, press  to add a new occurrence.
- To delete an exciting deficiency that was created in error press 
- To go back to Home press the 

 or **[F10]** to go back to main grid
- Press 

 or **[F11]** to go back to previous field or mutliform
- Press 

 or **[F12**] to go forward to the next field or multiform

- **Deficiency Calculations**
  - `Color Code` – press **[F2]** to choose a color to assign the deficiency to a provider, optional
  - `Header Status (Level)` – the level is the type of letter the provider will receive for the deficiency
  - `Deficiency Start Date` – populates with todays days
  - `Deficiency End Date` – populates the end date when the deficiency is complete
  - `Total Deficiency Days` – the number of days the chart has been deficient (calculated)
  - `Active/Available Deficiency Days` – (calculated)
  - `Hold Start Date`
  - `Hold End Date`
  - `Hold Days`
  - `Manual Days`
  - `Unavailable Days` – the number of days the provider has been unavailable
  - `Header Notes -` free text field to add additional notes
- Press **[F6]** & **[F7]** to save

New Provider

If a chart has more than one provider that has a deficiency, go to:

- **Actions/New Provider [F8]** or press **[F8]**

This will create a new chart deficiency screen and the deficiency may be entered for the new provider

Printing or Emailing a Chart Deficiency

The user has the ability to print out a chart deficiency to put on the chart or email the deficiency to a provider

- With the record open in the chart deficiency module Press **[F10]** or the  button

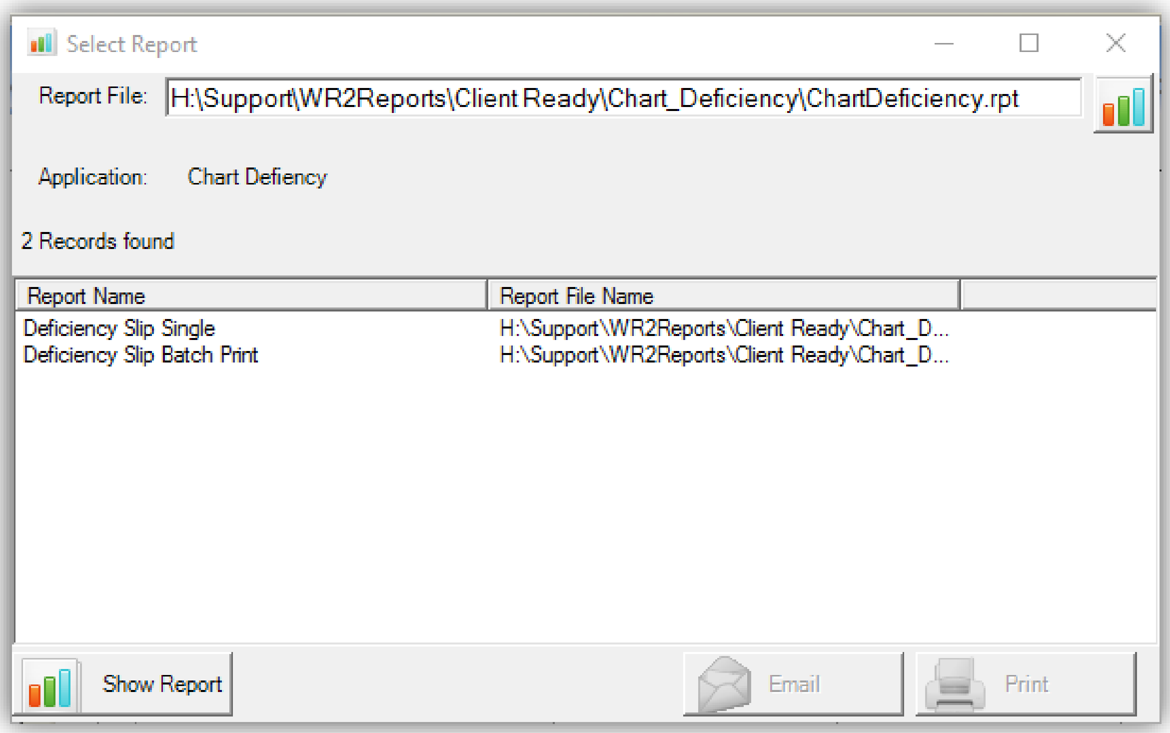


Figure 293 – Chart Deficiency – Printing/Emailing

- There are 3 options to printing the report:
    - Selecting the report from the file directory by double clicking in box next to *Report File:*. This will open the file directory to look for the Chart Deficiency report that needs to be printed.
        - Press the  to open the report and print from there
    - Highlighting the list of reports that are displayed in the middle of the screen (this is set up in **Maintenance/Report Maintenance**

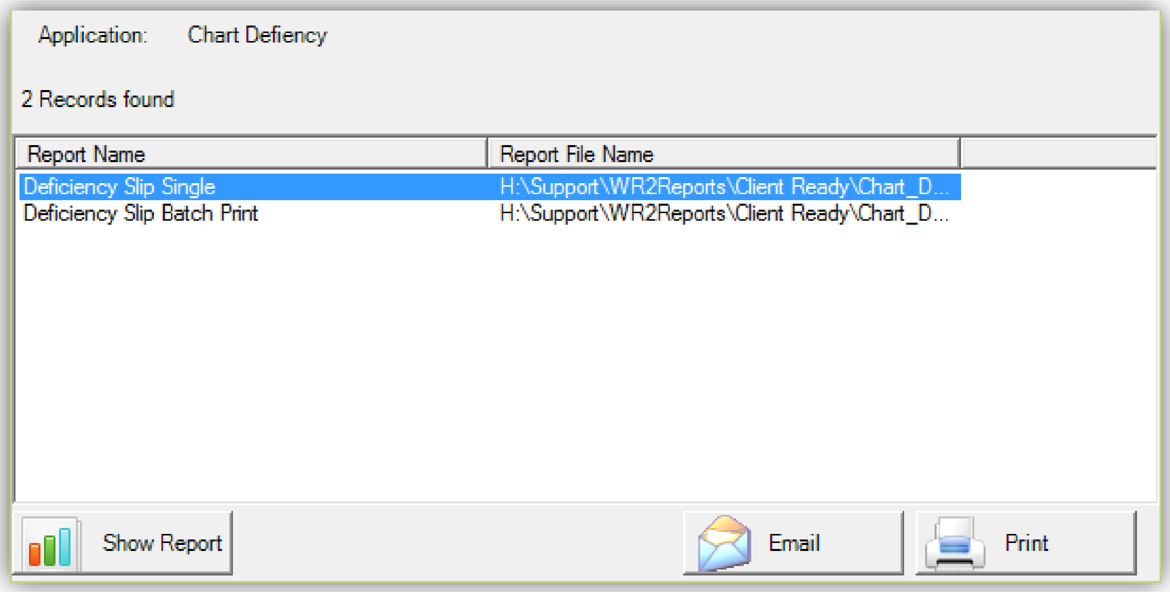
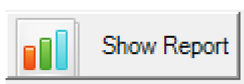
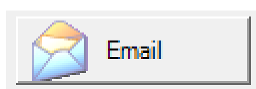


Figure 294 – Chart Deficiency – Printing/Emailing

- Press 
 to display the report and print from there OR
- Press 

- To Email the report, press 

Completing a Chart Deficiency

WinRecs allows for single deficiencies to be completed, one at time or in batches.

- Open up Chart Deficiency module and the Record Search window pop up, enter the chart number (or whatever type of search)
- If the chart number has more than one provider the search results will show each provider that has an outstanding deficiency. Choose the provider you wish to complete the deficiency.

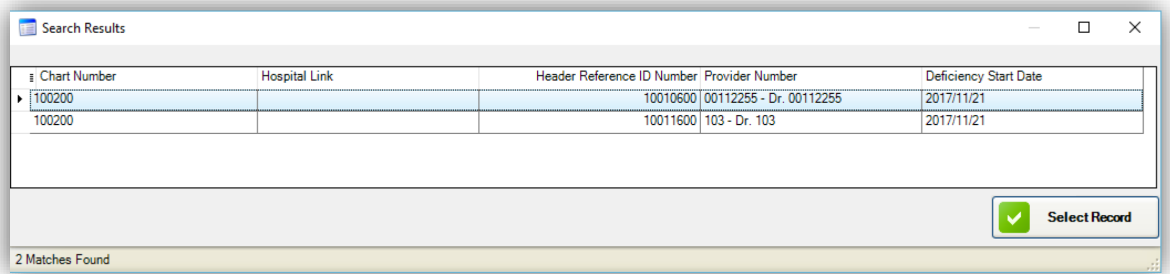


Figure 295 – Chart Deficiency – Deficiency Detail Information

- The Deficiency Complete tab will display the deficiencies

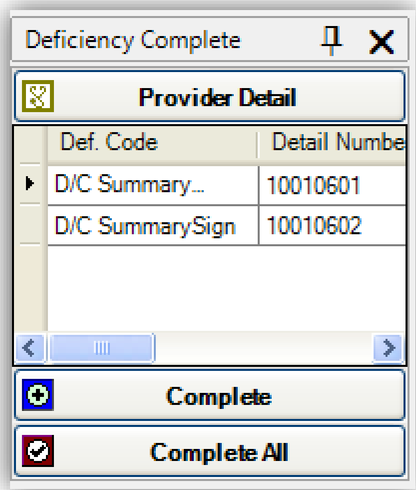
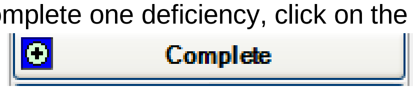
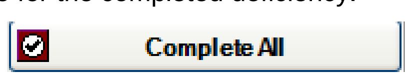


Figure 296 – Chart Deficiency – Deficiency Complete

- To complete one deficiency, click on the deficiency, a black arrow will appear.  then press 

  - If there is only one deficiency to be completed, the Deficiency End Date in the Deficiency Calculation will be populated with date the deficiency was completed, as well as the Deficiency Detail End Date will populate in the deficiency Detail Information.
  - If there are two deficiencies on the chart and only one is completed, only the Deficiency Detail End Date will populate for the completed deficiency.
- To complete all deficiencies for one chart press 

  - When all deficiencies are completed using complete All, the Deficiency End Date in the Deficiency Calculation will be populated with date the deficiency was completed, as well as the Deficiency Detail End Date will populate in the deficiency Detail Information.

- To complete all deficiencies in a batch, a provider has completed many charts at one time.
- **Actions/Batch Complete** – a list of all physicians with deficiencies will display

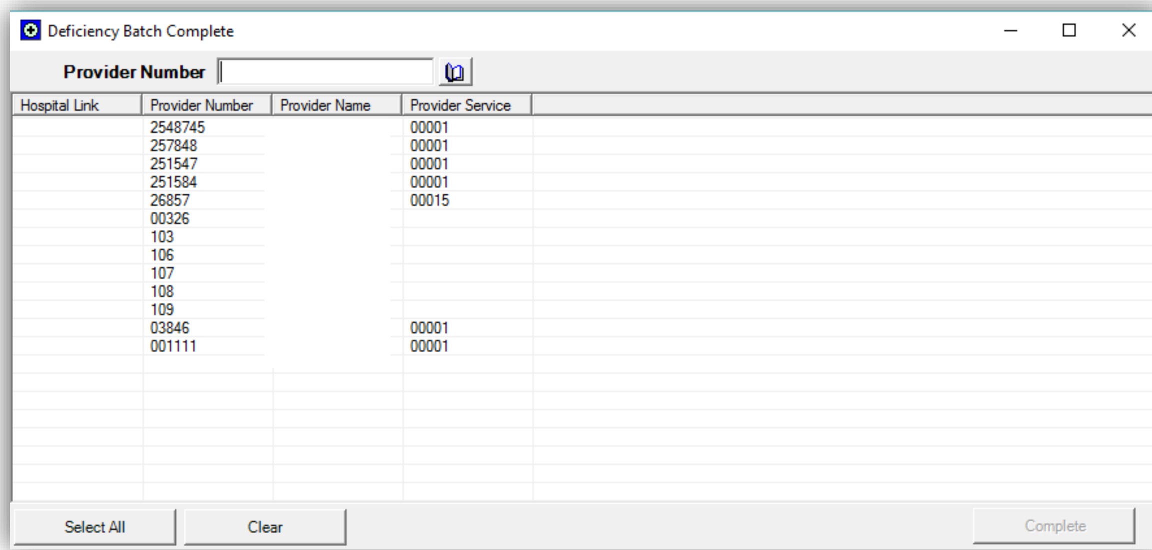


Figure 297 – Chart Deficiency – Deficiency Batch Complete

- Enter Provider Number in the box provided and it will only bring up that provider or double click on the provider in the list below
- A Screen will display all the charts with deficiencies for that provider

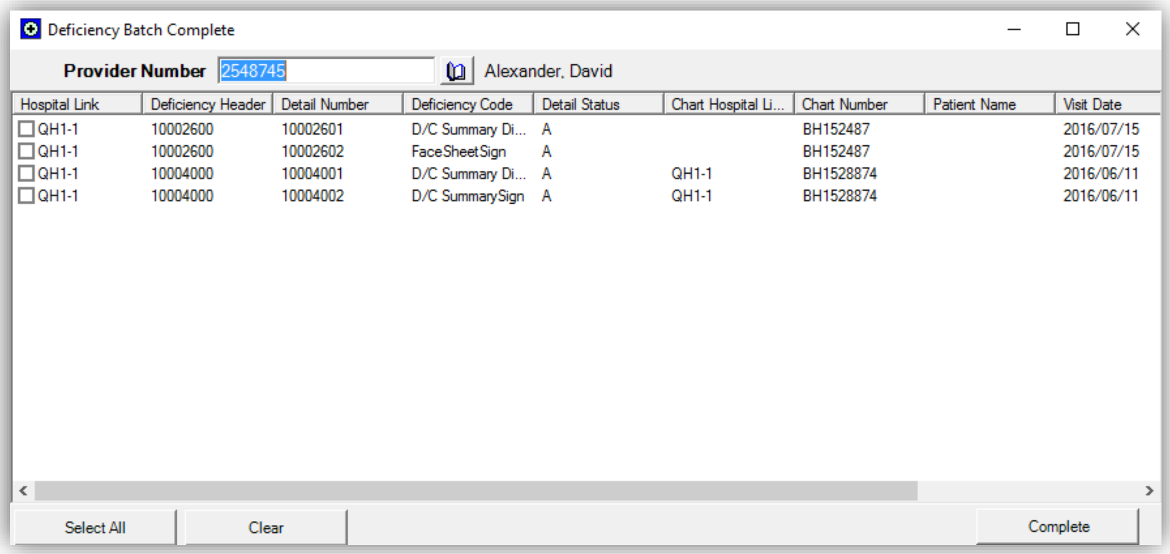


Figure 298 – Chart Deficiency – Batch Complete Provider Deficiencies

- ○ Either click on the box to choose the deficiencies you would like to batch complete or Click on Select All to check them all. 
- ○ If you would like to clear the check marks press Clear
- ○ Press Complete to finish the deficiencies with a check mark.
- ○ **Actions/Batch Complete** – a list of all physicians with deficiencies will display

- **Action/Incomplete** – If you complete a provider deficiency in error, you can go to **Action/Incomplete** and will make the deficiency(deficiencies) incomplete.

Transfer Deficiency to Another Provider

Deficiencies may be transferred to another provider as required. A new start date for the deficiency may be entered.

- From the chart deficiency that needs to be transferred, go to **Actions/Transfer** and the Deficiency Transfer will display with the list of providers who have active deficiencies.

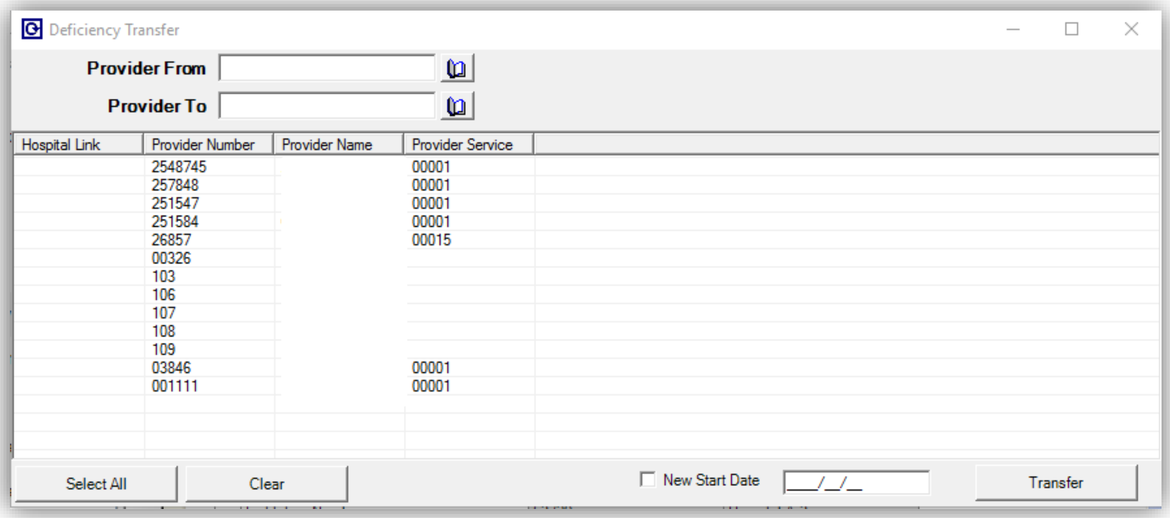


Figure 299 – Chart Deficiency – Deficiency Transfer

- To choose the `Provider From` – enter the provider or number or double click from the list below
- To choose `Provider To` – enter the provider number the deficiency is being transferred to
- A screen will show all the deficiencies that can be transferred from one provider to the other Provider

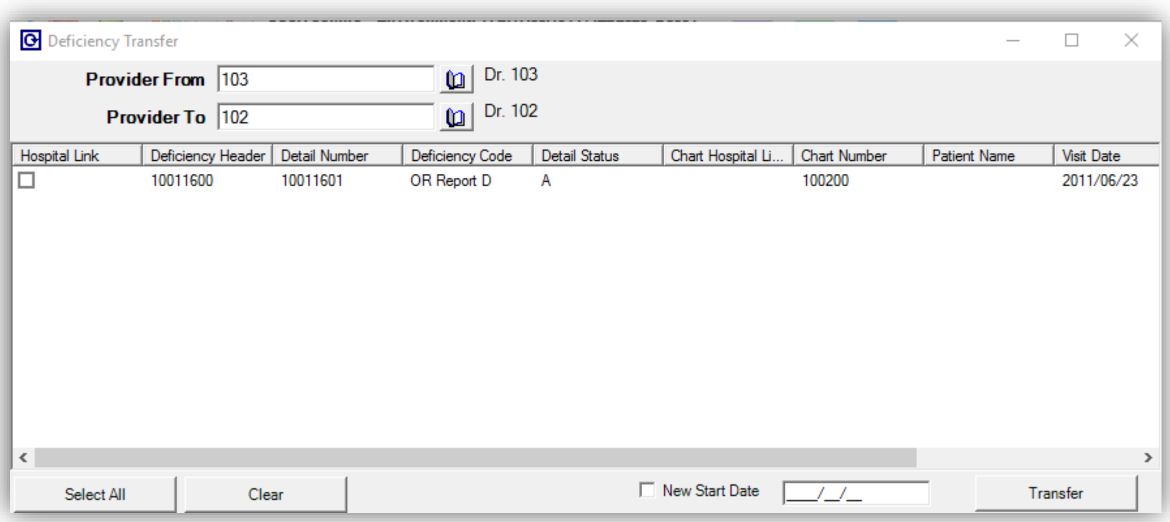


Figure 300 – Chart Deficiency – Deficiency Transfer – Charts to be Transferred

- Either click on the box to choose the deficiencies you would like to transfer or Click on Select All to check them all.
- If you would like to clear the check marks press Clear
- `New Start Date` – if you would like the deficiency to start counting on a new date, put a check mark in the New Start Date and add the date you would like it to start.
- Press Transfer to transfer the deficiencies with a check mark

Deficiency Letters

The Chart Deficiency module can auto-generate deficiency letters to providers to notify them for chart completion. The can be up to five deficiency levels which are defined by the site, each level represents the number of days the chart is deficient.

6.1.5 [ROI] Release of Information

The Release of Information module is used to maintain and store all Release of Information requests received by a facility. I t can be used to track turn-around time, authorizations, workload measurement as well as invoicing and payments, if desired.

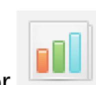
The requests are chart-based, so a request must relate to an existing record in the Central Patient Index.

Release of Information Setup

The following setup must be completed before using the Release of Information module.

- **Regional/Hospital Profile:** Completion of **Module Options/[ROI] Release of Information** fields
  - `GST Number`
  - `Tax Rate 1`
  - `Tax Rate 2`
- **Control File:** Enabling, Disabling, making fields Visible moving of fields around the Release of Information module
- **Look Up Code Maintenance:** The [ROI] Release of Information has the following fields that must be populated (all other fields are optional)
  - `Action Type`
  - `Age Code`
  - `Authorization Received`
  - `Authorization Required`
  - `Authorization Signed by`
  - `Authorization Type`

- Chargeable
- Confidential
- Contact
- Document Code
- Extension Notice Required?
- Fee Level
- Item Code
- Item Tax Type
- Next Action
- Payment Method
- Request Method
- Request Type
- Requester Billing Country
- Requester Billing Province
- Requester Country
- Requester ID
- Requester Province
- Requester Type
- ROI Status
- Sent by (Couriers)
- Urgency of Request

- **Report Maintenance** – to set up reports to be run using **[F10]** or 

Accessing Release of Information

WinRecs Module Menu → Chart Maintenance → [ROI] Release of Information

- Or -

Modules → Chart Maintenance → [ROI] Release of Information

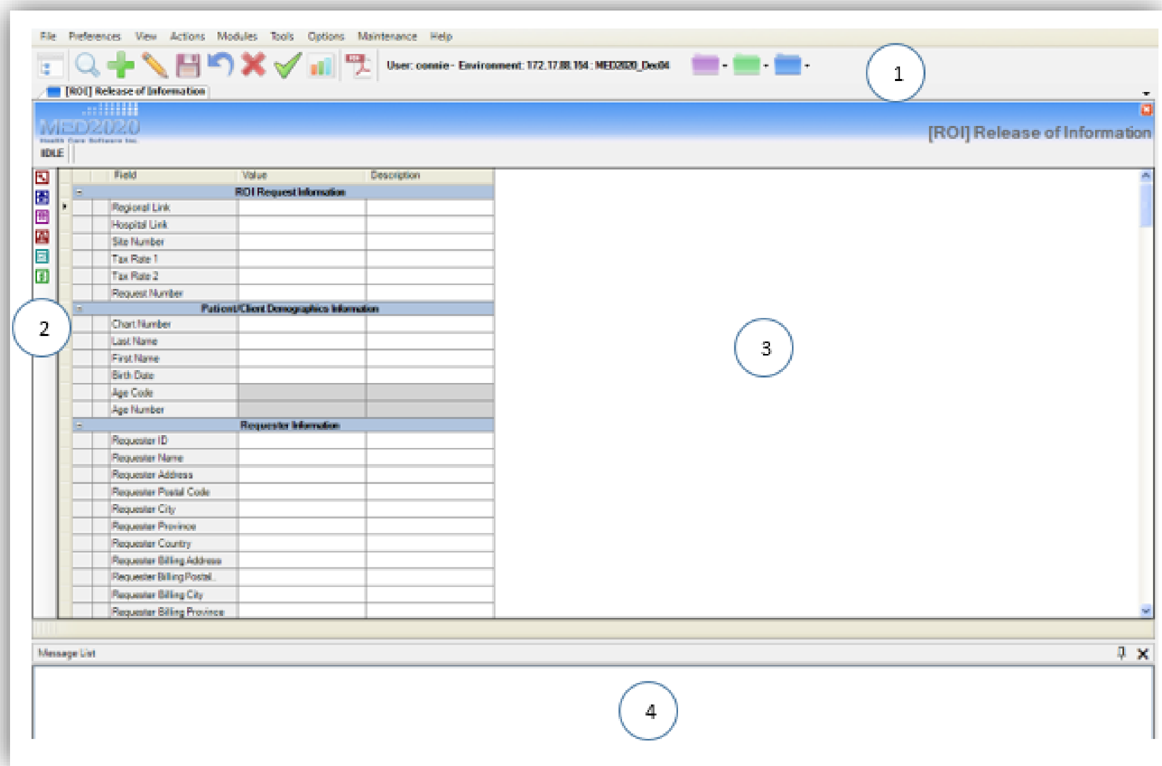


Figure 301 – Release of Information Module

1. **Tool Bar** – see Tool Bars
2. **Bookmarks** – Quick links to the Section Headers
    - **- ROI Request Information**
    - **- Patient/Client Demographics Information**
    - **- Contact Information**
    - **- Action Data**
    - **- Sent Information**
    - **- Invoice Information**
3. **Transaction Information** – The Sections included in this area are:
    - Patient/Chart Demographics Information
    - Requestor Information
    - Request Information
    - Contact Information
    - Action Data – multiform
    - Document Information – multiform
    - Sent Information
    - Items Sent - multiform
    - Invoice Information
    - Payments Information – multiform

- User Fields Information – Set 1
- User Fields Information – Set 2
- User Fields Information – Set 3
- User Fields Information – Set 4
- User Fields Information – Set 5

4. **Messages** – displays a message of any fields that need to be entered, the fields will disappear as they are filled in

Creating a New Release of Information Transaction

- Open up Release of Information Module and close the Record Search window pop up
- To create a new Release of Information Transaction, press the  or **[F5]**
- **ROI Request Information**
    - `Regional Link` – will populate if user is assigned to Regional Link, can press **[F2]** to look up
    - `Hospital Link` – will populate if user is assigned to Hospital Link, can press **[F2]** to look up
    - `Site Number` – Enter the site, can press **[F2]** to look up available sites
    - `Tax Rate 1` – used to calculate the GST
    - `Tax Rate 2` – used to calculate the PST
    - `Request Number` – A unique alphanumeric identifier for the request. The first digit must be numeric. Can be generated automatically
- **Patient/Client Demographics Information**
    - `Chart Number` – enter the chart number
    - `Last Name` – populates the patient last name
    - `First Name` – populate the patient first name
    - `Birth Date` – populates the birth date
    - `Age Code` – the age in 'Y'- years, 'M' – months, 'D'- days will populate
    - `Age Number` – the number will populate
- **Requester Information**
    - `Requester ID` – Mandatory – The ID of the person or organization requesting the information. Press [F2] to display the list of requestors from the look up
    - `Requester Name` – The name of the Requester
    - `Requester Address` – will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
    - `Requester Postal Code` - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered

- Requester City - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Province - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Country - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Billing Address - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Billing Postal Code - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Billing City - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Billing Province - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Billing Country - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Phone Number - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Phone Extension - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Fax Number - will auto-populate if fields populated in the Requester ID Look up table or can be manually entered
- Requester Type – type of information being requested, press F2 to display the list of types from the look up table

- **Request Information**
  - Request Dated – the actual date on the request. The number of days between the Request Received Date and the Request Dated are used to calculate the Duration Since Request Received
  - Request Received Date – mandatory – the date the request was received, press **[Spacebar] [Enter]** to enter todays date
  - Request Received Time – the time the request was received, press **[Spacebar] [Enter]** to enter the current time
  - Request Coder – the ID of the person entering the request, press **[F2]** to display the coder
  - Request Method – The way in which the request was received, press **[F2]** to display the look up list of Request Methods
  - Request Type – The type of information requested. Press **[F2]** to display the look up list of Request Types

- `Chargeable` – Indicates if the request is chargeable ('Y' or 'N'). If Chargeable Request is 'N', the Fee Level field, Invoice Information & Payment Multiform are disabled.
- `Request Duration` – The number of days between the Request Received Date and the Sent Date are used to calculate Request Duration.
- `Urgency of Request` – Indicates the urgency of the request, can press F2 to display the look up list of Urgencies.
- `Fee Level` – This is connected to the Requester ID. If the requester has a fee level assigned, the Fee Level is entered automatically.
- `Request Comments` – Used to enter any required comments.

- **Contact Information**
  - `Contact` – The code for the contact. This is linked to the Requester ID.
  - `Contact Name` – The name of the contact
  - `Contact Email` – email of the contact
  - `Contact Phone Number` – phone number of the contact
  - `Contact Phone Extension` – phone extension of the contact
  - `Contact Fax Number` – fax number of the contact
  - `Authorization Required` – Indicates if authorization is required ('Y' or 'N'). If 'N' is entered then Authorization Received and Authorization Signed By are disabled.
  - `Authorization Received` – If Authorization Required is 'Y', this field will open and a ('Y' or 'N') will be required
  - `Authorization Type` – the type of authorization that was received, press F2 to display the look up list of types.
  - `Authorization Signed By` – who signed the authorization
- **Action Data** – multiform – what was done with the chart

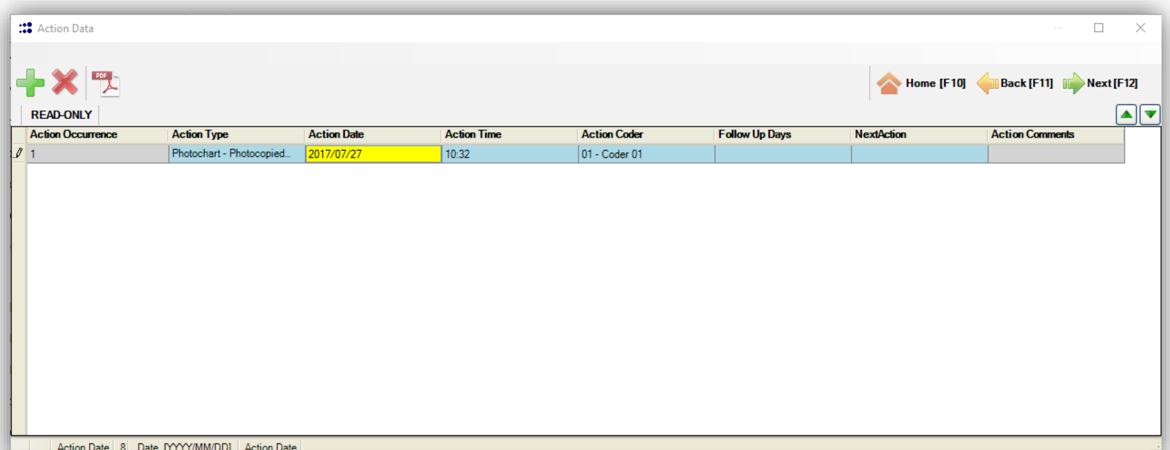


Figure 302 – ROI – Action Data Multiform

- `Action Occurrence` – The unique occurrence number of the action done. This is incremented automatically
- `Action Type` – The field indicates the action taken. As the table containing this information is user-defined, actions can be customized to fit your own departmental workflow and procedures. Press **[F2]** to display the look up of Types.
- `Action Date` – the date the action occurred, can enter date or press **[Spacebar] [Enter]** to enter the date
- `Action Time` – the time the action occurred, can enter date or press **[Spacebar] [Enter**] to enter the date
- `Action Coder` – The user who performed the action. Press **[F2]** to display the list of users.
- `Follow Up Days` – The number of days in which the action needs to be completed. In combination with a report, this can produce workload information
- `Next Action` – indicates what the next action (if any) may be
- `Action Comments` – any additional comments

• **Document Information** – multiform – the document and dates send from the chart

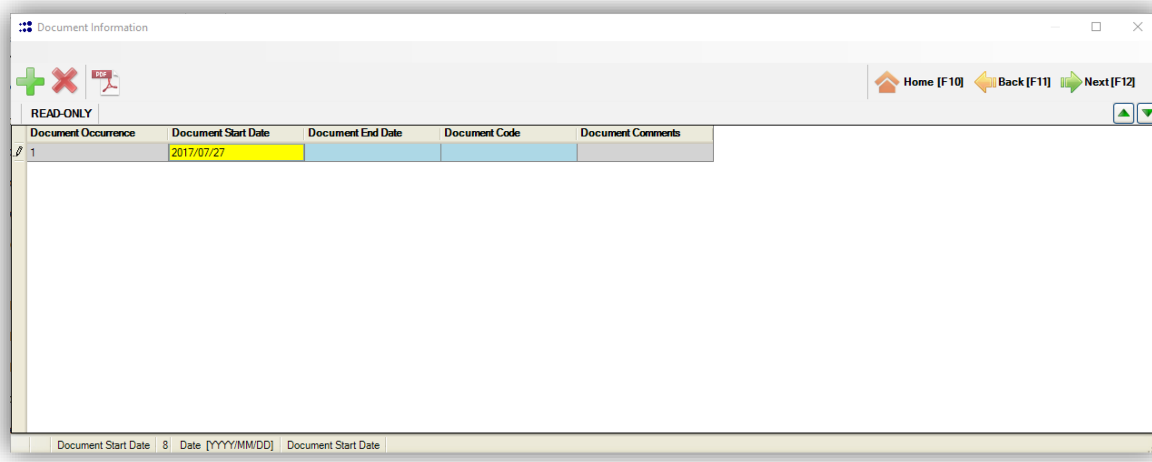


Figure 303 – ROI – Document Information

- `Document Occurrence` - The unique occurrence number of the document information. This is incremented automatically
- `Document Start Date` – the start date of the document information
- `Document End Date` – the end date of the document information
- `Document Code` – the type of document

  - `Document Comments` – any additional comments
- **Sent Information**
  - `ROI Status` – The status of the request. Press **[F2]** to display the list ROI Status
  - `Sent Date` – the date the information was sent **[Spacebar] [Enter]** to populate today's date
  - `Sent Time` – the time the information was sent. **[Spacebar] [Enter]** to populate the current time
  - `Sent Coder` – The ID of the person who sent the request. Press **[F2]** to display the list of coders.
  - `Sent By (Couriers)` – Indicates the method of delivery of the request. This is normally a courier name, press **[F2]** to display list of couriers
  - `Tracking Number` – The tacking number assigned by the courier for following the information sent
  - `Special Handling Instructions` – Enter any special instructions for handling the item
  - `Extension Notice Required?` – Indicates if extension notice is required ('Y' or 'N')
  - `Extension Days` – Number of days for extension
  - `Sent Item Comments` – any additional comments
- **Items Sent - multiform**
  - `Item Sent Occurrence` – This is a unique number, generated automatically to identify the occurrence of the item sent.
  - `Item Sent Date` – The date of information sent request. A date is required. Can press [Spacebar] [Enter] to populate todays date
  - `Item Quantity` – the number of items sent with this occurrence, such as number of photocopied papers, etc.
  - `Item Code` – Required – The code identifying the item, based on tables set up by the facility. Press **[F2]** to look up the item code.
  - `Item Price` – The item price. This defaults from the Item Code, but can be entered manually as well
  - `Item Tax Type` – The tax type (GST, PST, ect) of the item. The value in this field defaults from the Item Code, if applicable. Press **[F2]** to display the list of types.
  - `Item Total Amount` – The total amount of the items being sent.
  - `Sent Item Comments` – any additional comments
- **Invoice Information**
  - `Invoice Number` – the invoice number

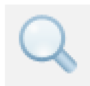
  - `Invoice Date` – the date the invoice was created. Press **[Spacebar] [Enter]** to enter todays date
  - `Invoice Time` – the time the invoice was created. Press **[Spacebar] [Enter]** to enter the current time
  - `Invoice Total` – the total amount of the invoice including applicable taxes
  - `Account Number` – the account number of requester
  - `GST Number` – The hospital's GST number can be entered here. This can be set up in the Control File default to avoid repetitive entry
  - `Amount Paid to Date` – the amount paid to date
  - `Total Amount Due` – the total due. The field adjusts as payments are made and recorded in the Payments multiform
  - `Due Date` – the date the Total Amount Due must be paid.
- **Payment Information** – multiform – Multiple payments may be recorded for each ROI request. This allows for installment payments to be recorded and fields to record information for invoicing purposes. The entire section is enabled if the 'Chargeable Request' Field is 'Y'
  - `Payment Occurrence` – This is a unique number, generated automatically to identify the occurrence of the payment
  - `Payment Date` – The date the payment is received. **[Spacebar] [Enter]** to enter today's date
  - `Payment Time` – The time the payment was received**. [Spacebar] [Enter]** to enter the current time.
  - `Payment Method` – The method used to make the payment, such as cheque, cash, etc.
  - `Payment Amount` – The amount of this payment
  - `Cheque No` – enter the cheque number if paid by cheque
  - `Payment Comments` – any additional comments
- User Fields Information – Set 1 – 5 – the User Fields Information provides 6 types of fields where data can be collected. In each set there are 5 of these fields types available.
  - `Date Fields`
  - `Time Fields`
  - `Look Up Fields` – can create look up fields in look up maintenance
  - `Numeric Fields` – 10 charter numeric
  - `Text` – 50 characters free text
  - `Note` – 255 characters

Modifying Release of Information Transactions

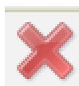
Release of Information transactions may be modified as required.

- Open up Release of Information Module and the Record Search window will pop up, enter the chart number (or whatever type of Release of Information search option is preferred).

- Or -

- Press **[F4]** or  to bring up the search window
- A window will display if there are multiple choices to make, double click on the transaction desired and the Release of Information Screen will display with the pertinent information.

Deleting Release of Information Transactions

- Open the Release of Information Transaction that needs to be deleted
- Press **F5** or the  to delete the transaction.
- The following message will appear:

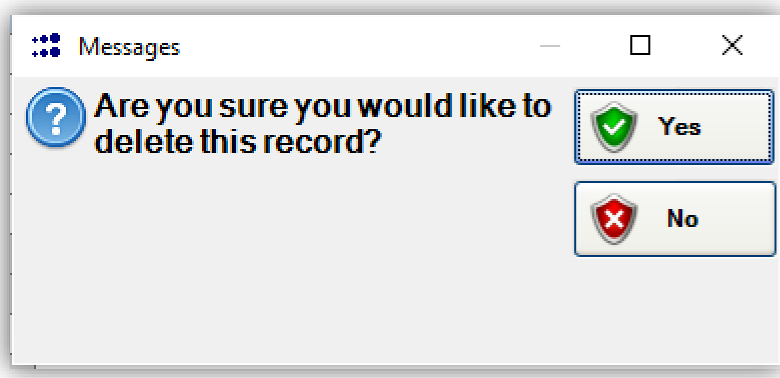


Figure 304 – Release of Information – Delete Chart Record

- Press Yes to delete or No to not delete.
- The deleted record will go into the Purge/Recover module, where the user has the option to Purge the transaction or Recover the transaction. Please refer to Purge/Recover

Release of Information Reports

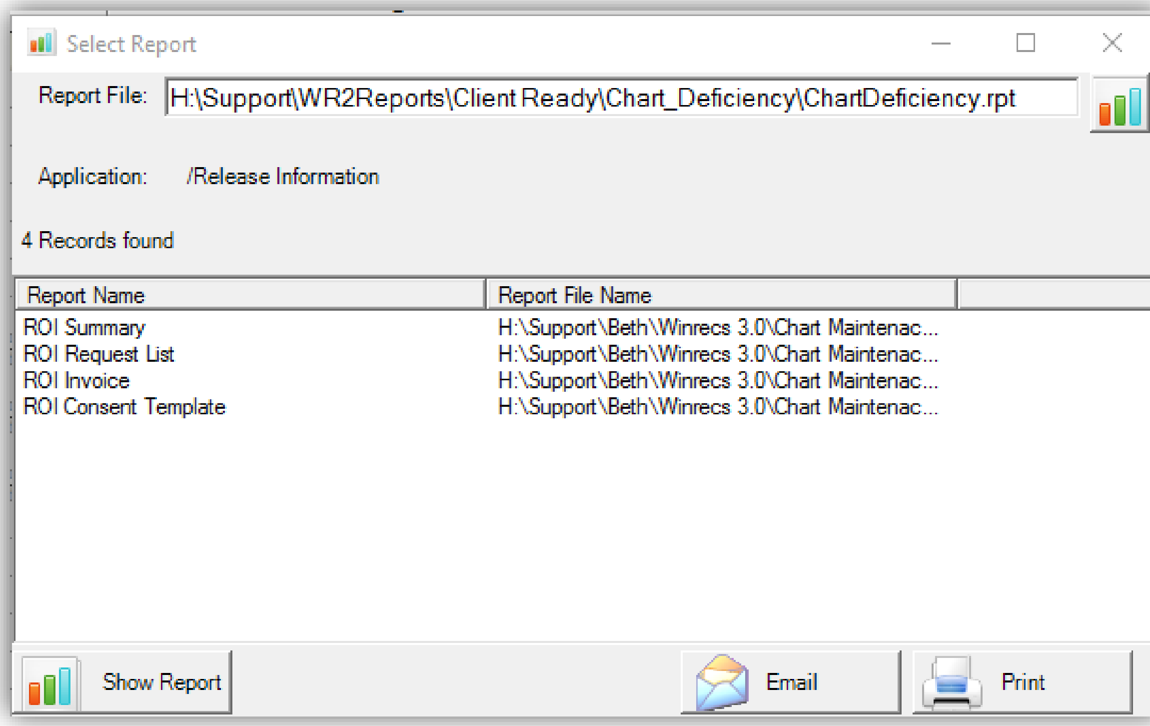
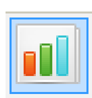
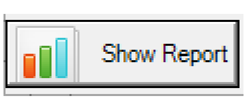
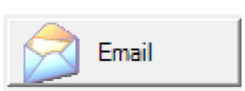


Figure 305 – Release of Information – Printing/Emailing Reports

- To print or view ROI reports press [F10] or  button
- A Select Report window will pop up giving the user the following two options:
  - Double clicking in the Report File rectangular window and searching for the ROI report to be printed
  - Press the  beside the rectangular window to display the report
- Choose the report in the list and highlight the report and the following 3 options are:
  - 

    to view the report
  - 

    to email the report
  - 

    to print the report

6.2 Abstracting – [DAD] AbsCare Inpatient

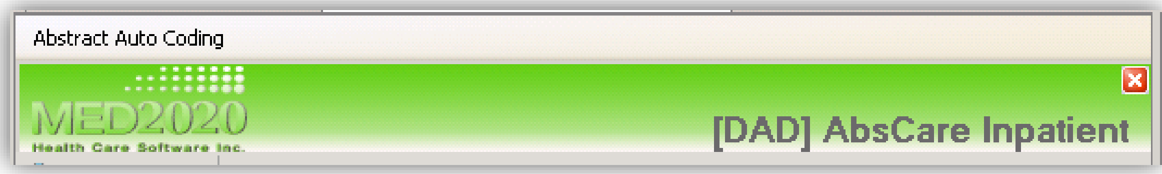


Figure 306 – [DAD] AbsCare Inpatient Header

The **DAD – AbsCare Inpatient** module is part of Abstracting Suite. This module is used to collect Inpatient Hospital data as per the CIHI – DAD Abstracting Manual.

To open the [DAD] AbsCare Inpatient module

- Select the menu option **Module → Abstracting → [DAD] AbsCare Inpatient**

  — or —

- Select **WinRecs Module Menu → Abstracting→ [DAD] AbsCare Inpatient**

The following System Mandatory fields must be completed in order to save: Chart Number, Institution Number, Discharge Date and Discharge Time field entered.

CMG Calculation

The CMG Calculation can be found in the dockable window called **Grouper.** This provides the user with all the grouper information related to the abstract.

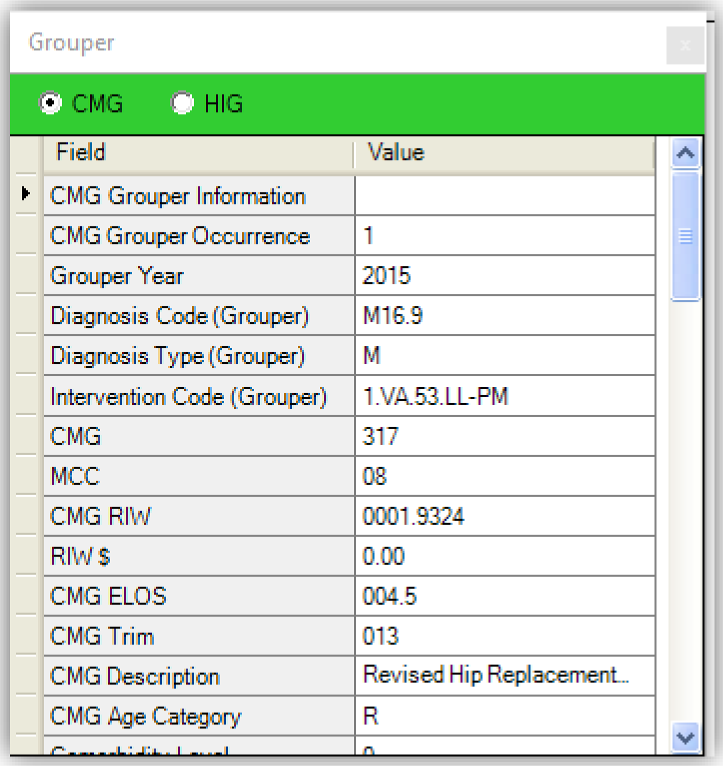


Figure 307 – CMG Grouper – Dockable Window

Double-click on any of the fields in the Grouper pane to open the CMG Batch/Optimizer window.

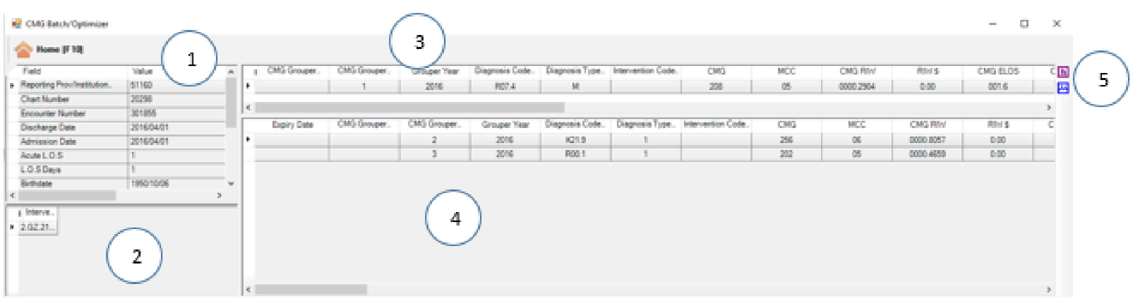


Figure 308 - CMG Batch/Optimizer window

1. Displays fields and values from the main grid that relate to the grouper
2. Displays the intervention codes and descriptions.

3. Displays the grouper values for the Most Responsible Diagnosis. The grouper values are automatically calculated and are based on the current fiscal year.
4. Displays the grouper values for each diagnosis other than the Most Responsible diagnosis. The values shown are what the grouper values would be if that diagnosis was to be selected as the Most Responsible Diagnosis.
5. Pressing these buttons will navigate to the Diagnosis and Interventions multiform and gives the ability to change the order of the diagnosis or intervention.

Optimized data shown on the Batch Optimizing form is not stored in the database (unless the Batch Grouper has already been run), and is for information purposes only. The option of storing optimized data is given when the Batch Grouper is run.

6.3 Abstracting – [CCR] DAD Concurrent Review

Figure 309 [CCR] - Concurrent Review Inpatient Header

The **Concurrent Review** module is used to abstract patient data during the patient's hospitalization.

The module can be used in Conjunction with the CMG+™ grouper to determine expected length of stays (ELOS) and predict expected dates of discharge.

Data entry is completed the same as other abstracting modules. The more data collected during the hospitalization, the more complete the abstract will be on discharge. Once the `Discharge Date` is populated, the chart will move from the **CCR** module **Inpatient** module.

To open the [CCR] DAD Concurrent review module

- Select the menu option **Module → Abstracting → [CCR] DAD Concurrent Review**

  — or —

- Select **WinRecs Module Menu → Abstracting→ [CCR] DAD Concurrent Review**

Reporting [CCR] DAD Concurrent Review

Data entered into **CCR** can be used in the **Report Manager** to prepare statistical reports on current inpatients.

To report the LOS in the **Concurrent Review Module**, do not use the LOS in the Abstract Grid as the LOS is based on the discharge date. Since **CCR** does not have a discharge date the LOS is not updated. For reporting purposes in Crystal Report, do not use the LOS field in the Abstracting views, use the custom formula that uses the Admit Date and the Current Date. A sample is provided below:

Create the formula below with the name ‘LOS Calculation’

If {I10_Abstracting.AdmissionDate} = CurrentDate then 1 else DateDiff ('d',{I10_Abstracting.AdmissionDate} , CurrentDate)

Place the formula as the LOS field in the report.

In order to save the record, the abstract must have the Institution Number, Chart Number and Admit Date.

6.4 Abstracting – [SDS] AbsCare Day Surgery

Figure 310 – [SDS] AbsCare Day Surgery Header

The **SDS – AbsCare Day Surgery** module is used to collect Day Surgery data as per the CIHI – DAD/SDS Abstracting Manual.

The Same Day Surgery Abstracting is completed in this separate module for all clients except Ontario clients where SDS is completed using **the [NACRS] Level 3 AmCare Ambulatory** module.

To open the [SDS] AbsCare Day Surgery module

- Select the menu option **Module → Abstracting → [SDS] AbsCare Day Surgery**

  — or —

- Select **WinRecs Module Menu → Abstracting→ [SDS] AbsCare Day Surgery**

The following System Mandatory fields must be completed in order to save: Chart Number, Institution Number, Discharge Date and Discharge Time field entered.

6.5 Abstracting – [NACRS] Level 0 (Clinic Lite) AmCare Ambulatory

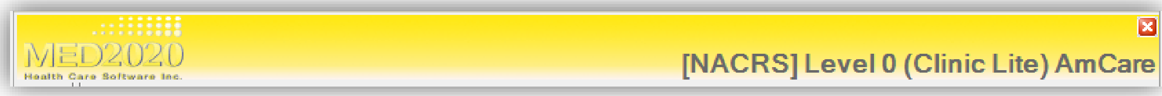


Figure 311 – [NACRS] Level 0(Clinic Lite) AmCare Header

The [NACRS] Level 0 (Clinic Lite) AmCare Ambulatory module is used to collect Clinic Lite data. Records in Clinic Lite include Ambulatory Care Groups CL, DI, and OT.   A field has been created to identify the Clinic Lite records called 'NACRS Clinic Lite Submission':

- 'F' means the chart is flagged and will be submitted
- 'Y' means the chart has been submitted
- 'N' means the chart will not be submitted as Clinic Lite record

> **Please note**: If the Ambulatory Care Group CL is submitted as Level 3 then be sure to create the record in [NACRS] Level 3 AmCare.

Changing Unsubmitted Level 0 chart to Level 3

If an unsubmitted record is abstracted in Level 0 but should be a Level 3:

- Open [NACRS] Level 3 AmCare
- Search for the record
- A warning message will display:

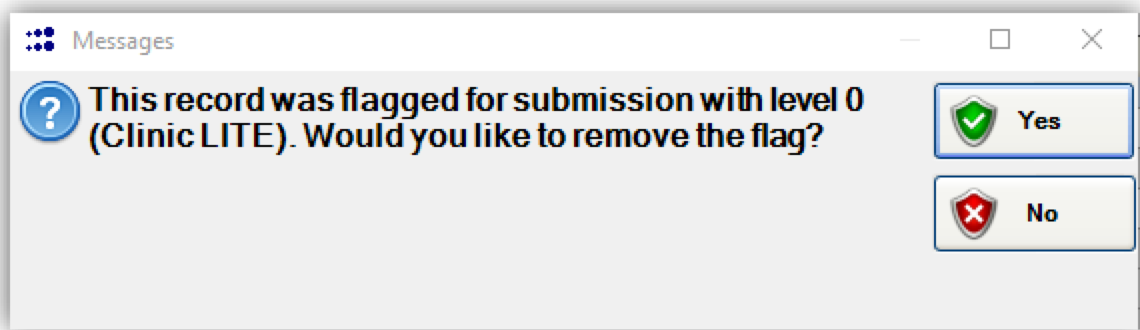


Figure 312 – Changing Level 0 to Level 3 message

- Click Yes to save the record or No to not save
- Save the record in Level 3 and it will now be submitted as Level 3.

Changing Unsubmitted Level 3 to Level 0

- Open [NACRS] Level 0 Amcare
- Search for the record
- Save the record and the 'NACRS Clinic Lite Submission' will be flagged with "F"

6.6 Abstracting – [NACRS] Level 1 AmCare Ambulatory

Figure 313 – [NACRS] Level 1 AmCare Header

The [NACRS] Level 1 AmCare Ambulatory module is used to collect Emergency (NACRS) data as per the CIHI – NACRS Abstracting Manual. As per CIHI Level 1 includes data elements required for ED wait time, also allows for optional collection of Presenting Complaint and ED Discharge Diagnosis (as directed by region/province).

Using this module will display Level 1 edits only.

To open the [NACRS] Level 1 AmCare Ambulatory module

- Select the menu option **Module → Abstracting → [NACRS] Level 1 AmCare Ambulatory**

  — or —
- Select **WinRecs Module Menu → Abstracting→ [NACRS] Level 1 AmCare Ambulatory**

6.7 Abstracting – [NACRS] Level 2 AmCare Ambulatory

Figure 314 – [NACRS] Level 2 AmCare Header

The **[NACRS] Level 2 AmCare Ambulatory** module is used to collect Emergency (NACRS) data as per the CIHI – NACRS Abstracting Manual.

As per CIHI Level 2 includes data elements required for ED wait time and the collection of one of Presenting Complaint and ED Discharge Diagnosis is mandatory.

Using this module will display Level 2 edits only.

To open the [NACRS] Level 2 AmCare Ambulatory module

- Select the menu option **Module → Abstracting → [NACRS] Level 2 AmCare Ambulatory**

  — or —

- Select WinRecs Module Menu → Abstracting→ [NACRS] Level 2 AmCare Ambulatory

6.8 Abstracting – [NACRS] Level 3 AmCare Ambulatory

Figure 315 – [NACRS] Level 3 AmCare Header

The **[NACRS] Level 3 AmCare Ambulatory** module is used to collect Emergency (NACRS), Clinical and Surgical Daycare (Ontario only) data as per the CIHI – NACRS Abstracting Manual.

As per CIHI Level 2 includes all mandatory and optional data elements. It is mandatory to capture ICD-10-CA/CCI Diagnosis and Intervention information.

Using this module will display Level 3 edits only, Level 1 and 2 data will flow over to the Level 3 abstract.

To open the [NACRS] Level 3 AmCare Ambulatory module

- Select the menu option **Module → Abstracting → [NACRS] Level 3 AmCare Ambulatory**

  — or —

- Select **WinRecs Module Menu → Abstracting→ [NACRS] Level 3 AmCare Ambulatory**

> **The following System Mandatory fields must be completed in order to save for all NACRS Levels: Chart Number, Institution Number, Registration Visit Date and Registration Visit Time field entered.**

6.9 Abstract Auto Coding

Within each Abstracting Module (except CCR), there is an option of **Abstract Auto Coding** just above the module header.

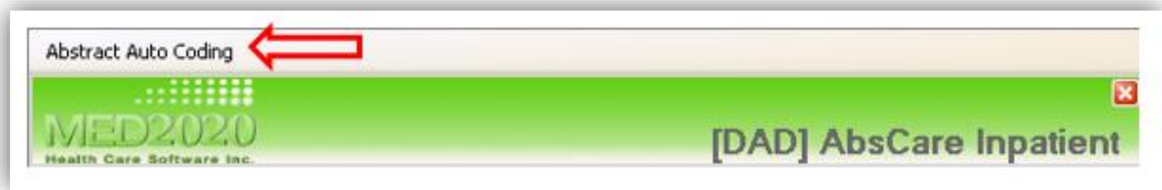


Figure 316 – Abstract Auto Coding

There are two options:

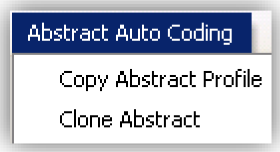


Figure 317 – Abstract Auto Coding Options

Copy Abstract Profile

Copy Abstract Profile is used to create generic abstracts in Amcare, Inpatient & Day Surgery modules. Profiles are used for abstracts with the same type of admission/diagnosis/intervention.

Create an Abstract Profile

- Go to **Tools→Abstract Profile**
- Click on `Abstract Profile` and the following screen will populate

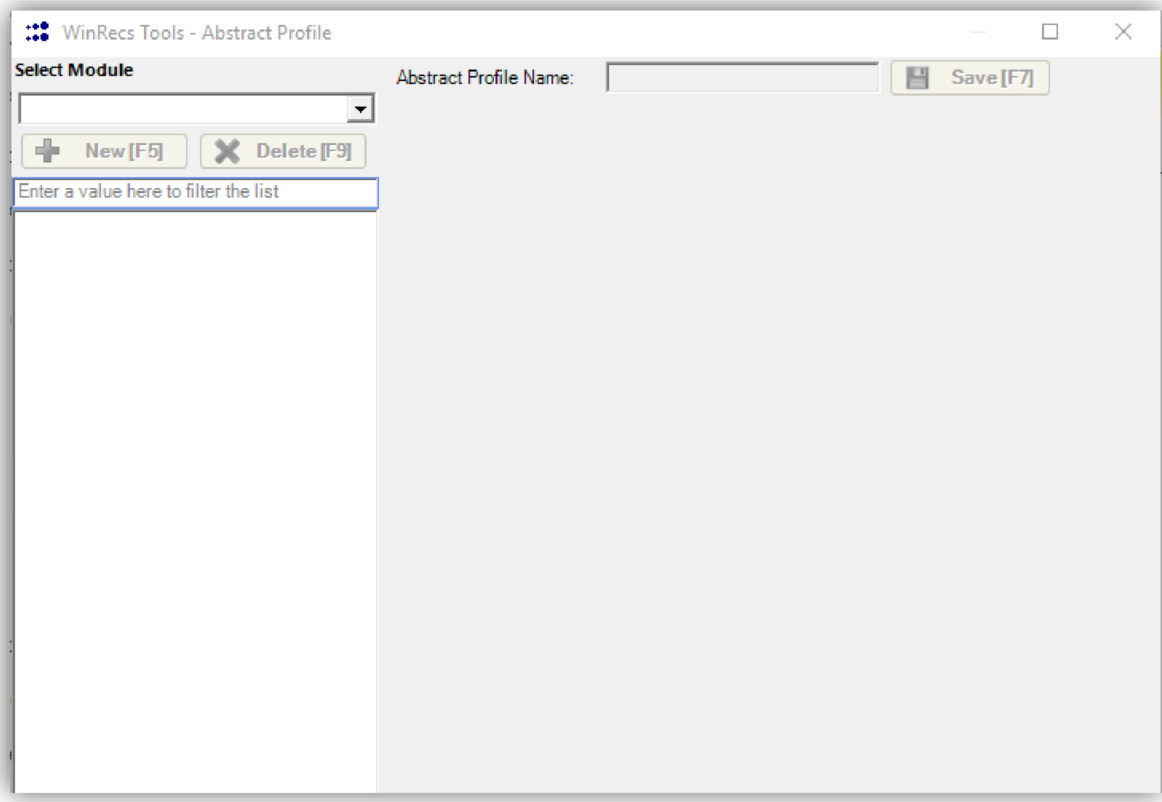


Figure 318 – Abstract Profile Screen

- Under `Select Module` – click on the drop-down menu and the list of modules will display, choose the appropriate module.

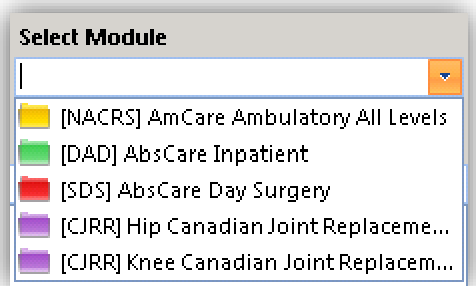


Figure 319 – Abstract Profile – Select Module Options

- The module fields will be displayed on the right-hand side.

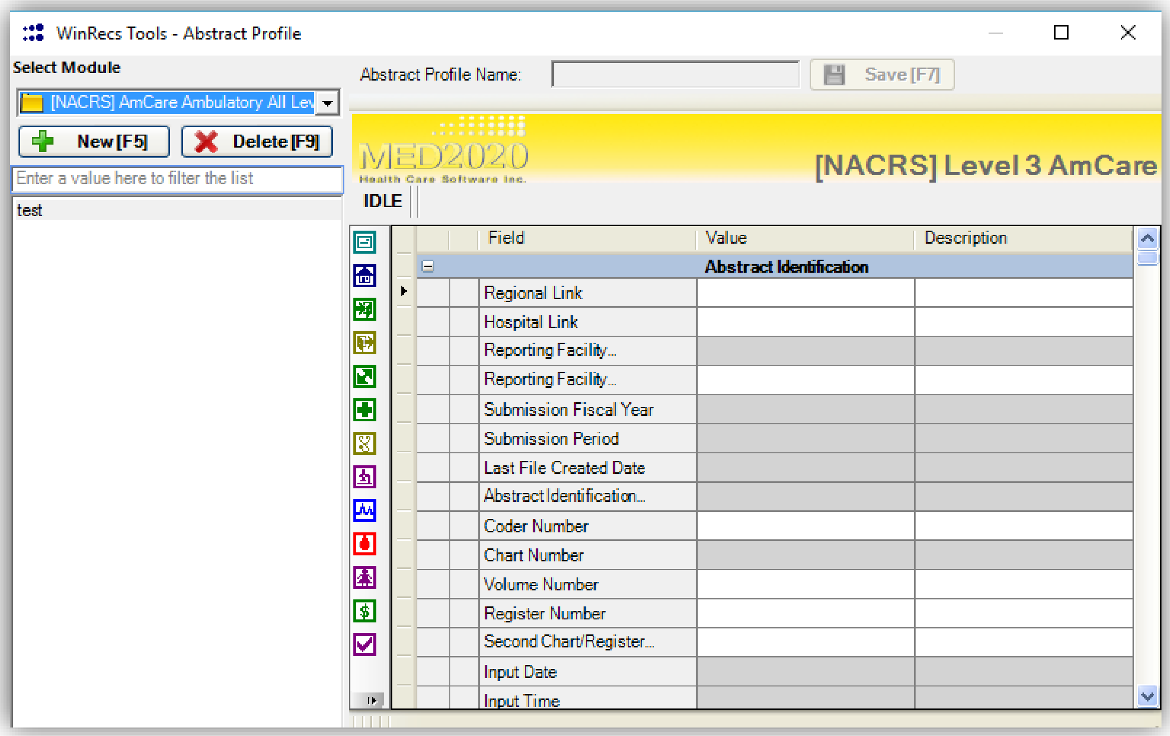
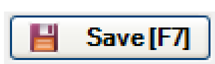


Figure 320 – Abstract Profile – Module Fields

- Click on `New Profile`
- `Abstract Profile Name` will open along the top, type in the *Profile Name*
- Enter the fields in the abstract that are the same for each profile such as dx, intervention. The user can put in as many or as little fields as required.
- Once completed press 

If Abstract Profile does not display in the Tool menu, this option will need to be set up in User Profile/Access Tools. Please contact your WinRecs System Administrator.

Edit an Abstract Profile

- Go to **Tools→Abstract Profile**

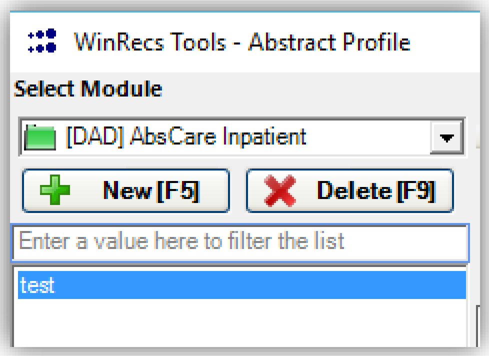
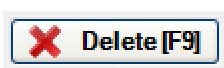


Figure 321 – Abstract Profile – Editing Abstract Module

Under `Select Module`, choose the module of the profile that needs editing

- If there are multiple profiles, filter in the "`Enter a value here to filter the list`"
- Double click on the profile that needs editing.
- The abstract profile will load on the right-hand side and make the necessary changes
- When done press **Save Profile**

Delete an Abstract Profile

- Under `Select Module`, choose the module of the profile that needs editing
- If there are multiple profiles, filter in the "`Enter a value here to filter the list`"
- Highlight on the profile
- Press 

- A message will pop up **"Are you sure you would like to delete this record?"** **Yes** will delete it and **No** will not delete.

Using an Abstract Profile

- Go to Abstracting and choose the module where the abstract profile resides
- Search for the abstract that the abstract profile will be copied to
- When the abstract is up, choose **Abstract Auto Coding/Copy Abstract Profile**

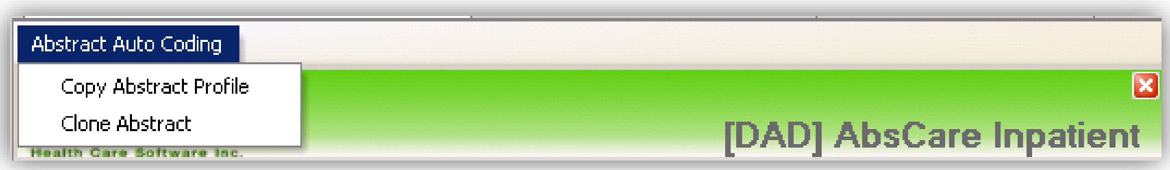


Figure 322 – Copy Abstract Profile

- Choose from the list of on the **Find Record Clone** screen and press **Select Record**

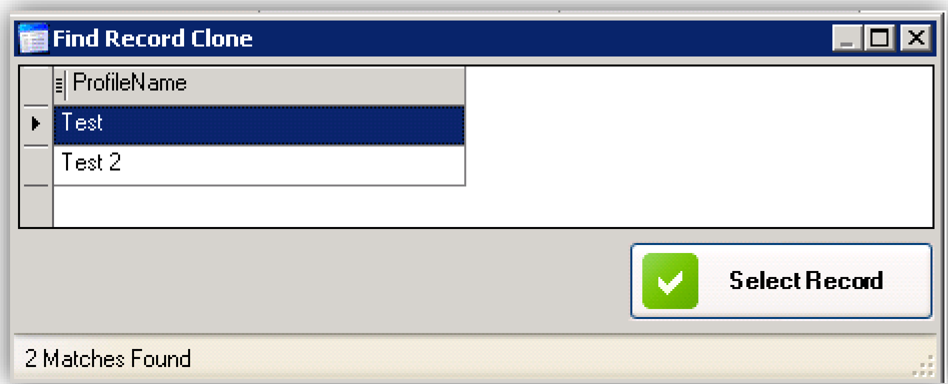


Figure 323 – Abstract Profile List

A message will pop up stating:

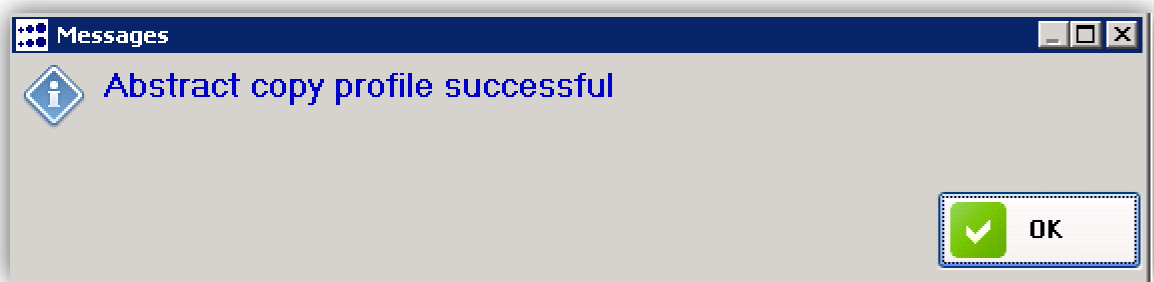


Figure 324 - Abstract Profile Successful Message

- The information in the abstract profile will populate the abstract.

If a field already has data in it, the Abstract Profile will not overwrite this.

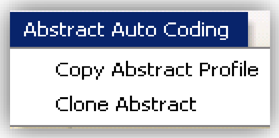
Clone Abstract

Clone Abstract accelerates the data entry process when working with a patient that has many of the same visits. For example, the information for a patient receiving chemotherapy or radiation treatment is the same for the majority of the abstract, using clone will speed up the data entry process.

Using Clone Feature

- If the abstract has been brought over by **HL7** or **Batch Interface** do a search on the abstract needed to be coded

- If the abstract is being created from New, enter the following fields:
  - `Registration Visit Date/Time` for **Amcare** and `Discharge Date/Time` for **Inpatient**
  - `MIS Code` for Amcare – Adding the MIS code will only bring up the similar MIS codes when looking for cloning. Leaving the MIS code blank will pull up all visits.
- Go to Abstract Auto Coding/Clone Abstract



- A list of Abstracts will display all the available visits, select the visit to be used for the cloned abstract.
- The following message will display

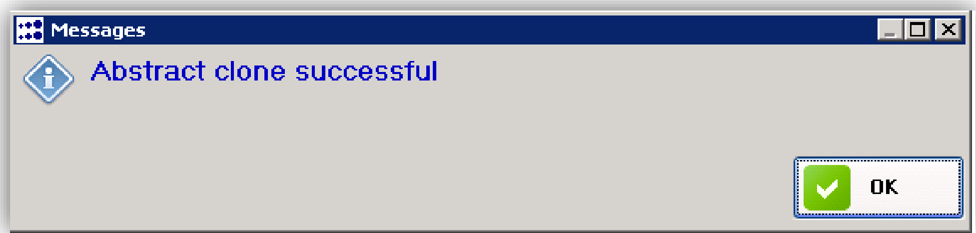


Figure 325 – Abstract Clone Successful Message

- WinRecs will copy the data from the selected abstract to the new abstracts, Date and Time Fields will be NOT be populated. All remainder of the fields will be populated.
- Review the record for any changes or updates that are needed

If a field already has data in it, the Clone Abstract will not overwrite this.

6.10 Abstract Queue

The Abstract Queue module is integrated with MED2020's chart abstracting software, WinRecs. The Abstract Queue:

1. Is available for AmCare (NACRS) and Inpatient (DAD) modules.
2. Lists visits that have not been accessed, that contain errors or that have been created by a user.
3. Provides assign capability by the Coder to themselves or by an Administrator to a Coder.

Opening the Abstract Queue

To access the Abstract Queue, the icon  is available in the icon bar in WinRecs. The Abstract Queue can be used to search for AmCare or Inpatient records.

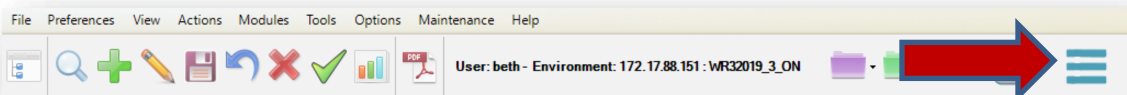
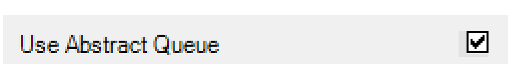


Figure 326 - Abstract Queue

To enable the Abstract Queue Icon, go to the Hospital Profile, System Wide Options and update field "Use Abstract Queue" to Yes. Save this value and then users must log out of WinRecs and back in for the change.



Click on the Abstract Queue icon to open the Abstract Queue window.

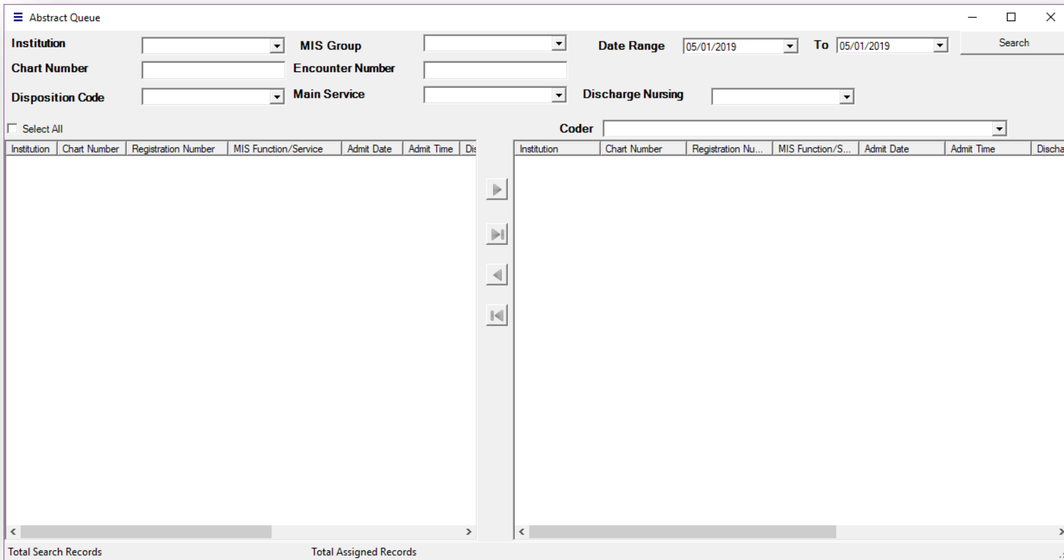


Figure 327 Abstract Queue Window

Searching for Records

The Abstract Queue allows filtering by Institution Number, MIS Group (Ambulatory Care Group), Date Range and Chart Number, Encounter Number, Disposition Code, Main Service, Discharge Nursing. Click the **Search** button once you've entered the parameters in the fields to run the search.

Search by Institution Number

All Institution Numbers are available to search on and are presented in a drop-down list. Use the mouse to highlight the desired Institution Number or the arrow keys to select it from the list.

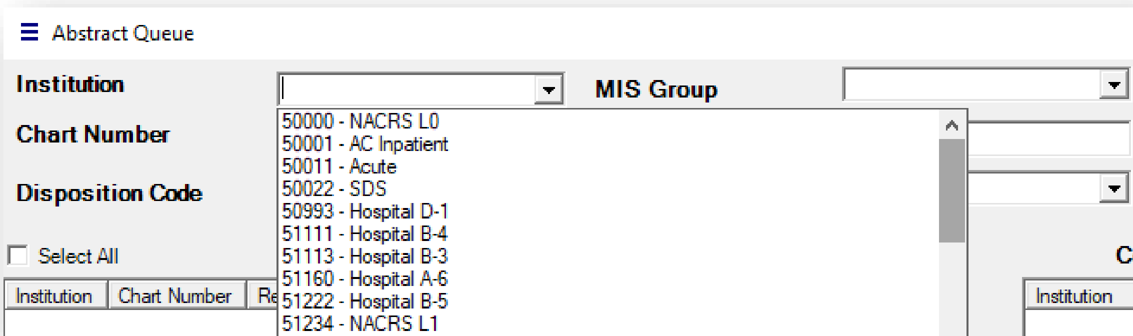


Figure 328 Abstract Queue - Search by Institution Number

Search by MIS Group

AmCare Institution Numbers can be further filtered by selecting the Ambulatory Care Group – Emergency Department (ED), Day Surgery (DS), Clinic (CL), Ophthalmology (OT), or Diagnostic Imaging (DI).

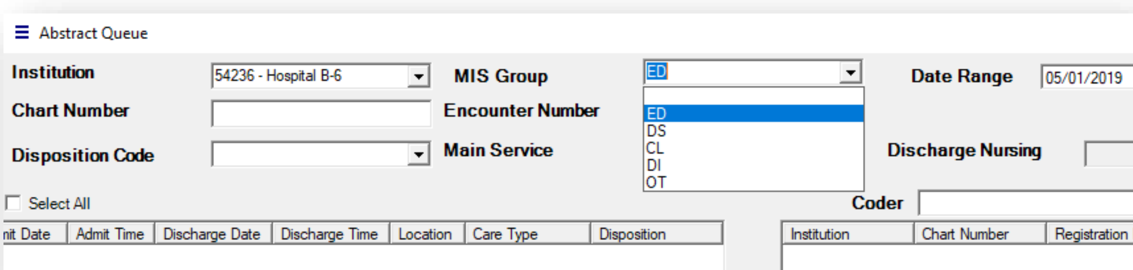


Figure 329 Abstract Queue - Search by MIS Group

Search by Date Range

The date format is presented as YYYY-MM-DD. The first date field indicates the start date for the search; the second field the end date for the search.

Type a date directly into the Date Range fields or use the arrow  to open the calendar and select a date. Forward and back arrows shown on either side of the name of the month let you move forward and back through the calendar one month at a time.

Click on '**Today'** at the bottom of the calendar to quickly fill today's date into the Date Range fields.

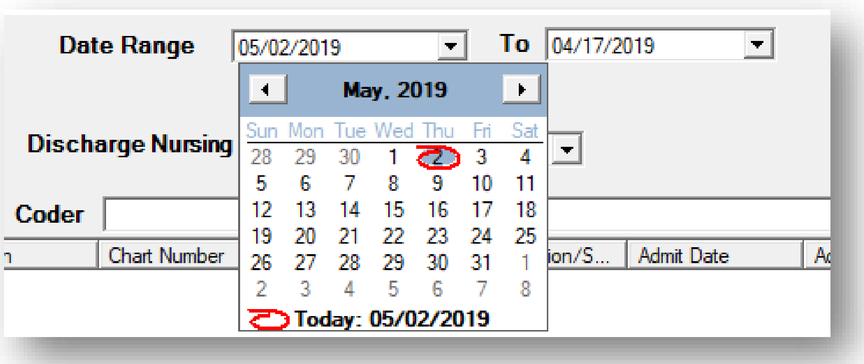


Figure 330 Abstract Queue - Search by Date Range

Search by Chart Number

Enter a chart number into the **Chart Number** field. Chart Numbers must be an exact match to locate the record; records with a partial match to the chart number will not be returned.

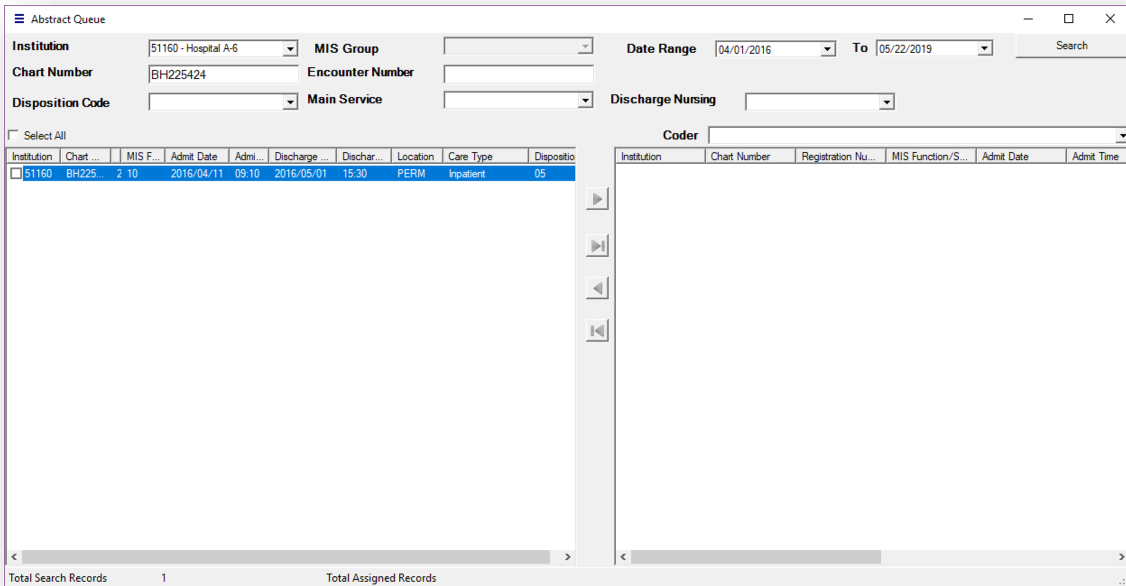


Figure 331 Abstract Queue - Search by Chart Number

Search by Encounter Number

Enter an encounter number into the **Encounter Number** field. Encounter Numbers must be an exact match to locate the record; records with a partial match to the chart number will not be returned.

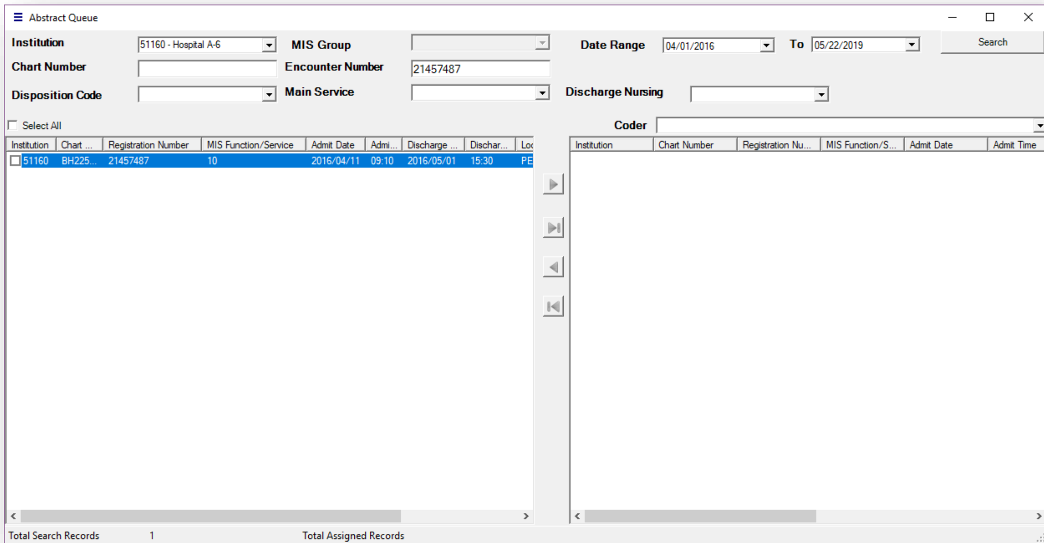


Figure 332 Abstract Queue - Search by Encounter Number

Search by Disposition Code

Can search by Disposition and select from a drop-down list

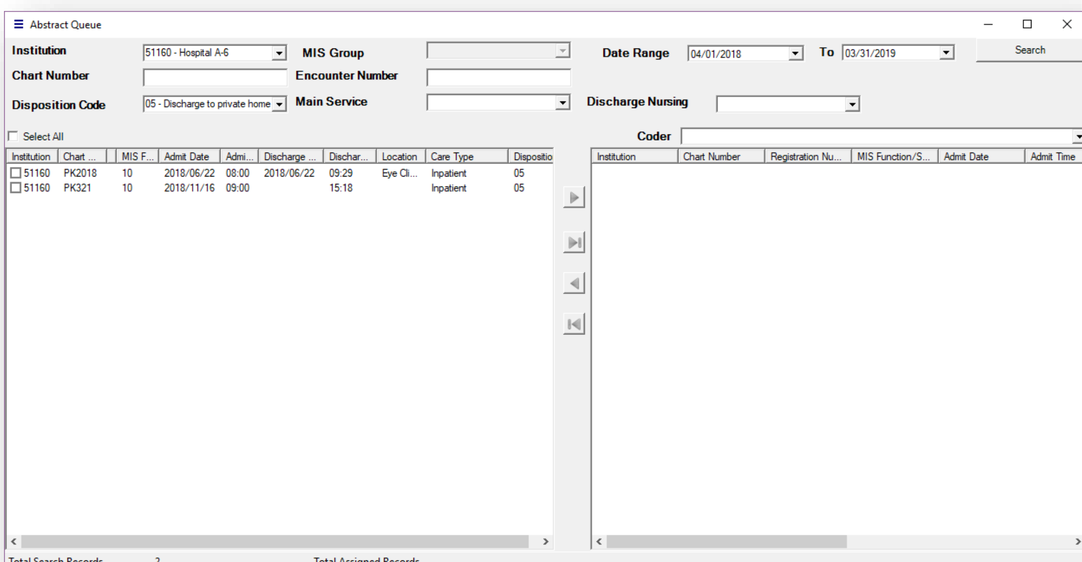


Figure 333 Abstract Queue - Search by Disposition Code

Search by Main Patient Service

Can search by Main Patient Service and select from a drop-down list

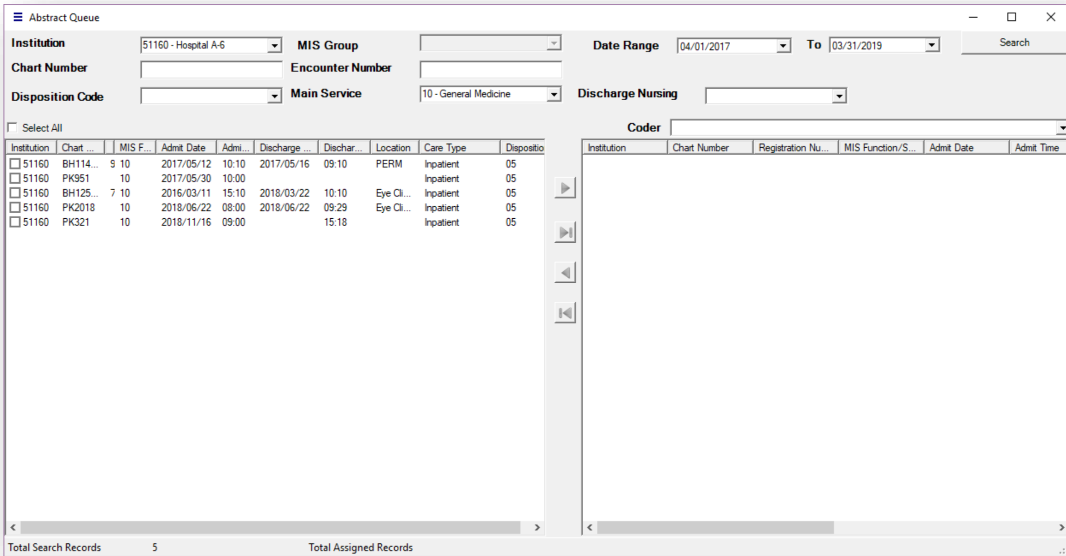


Figure 334 Abstract Queue - Search by Patient Service

Search by Discharge Nursing Area

Can search by Discharge Nursing Area and select from a drop-down list

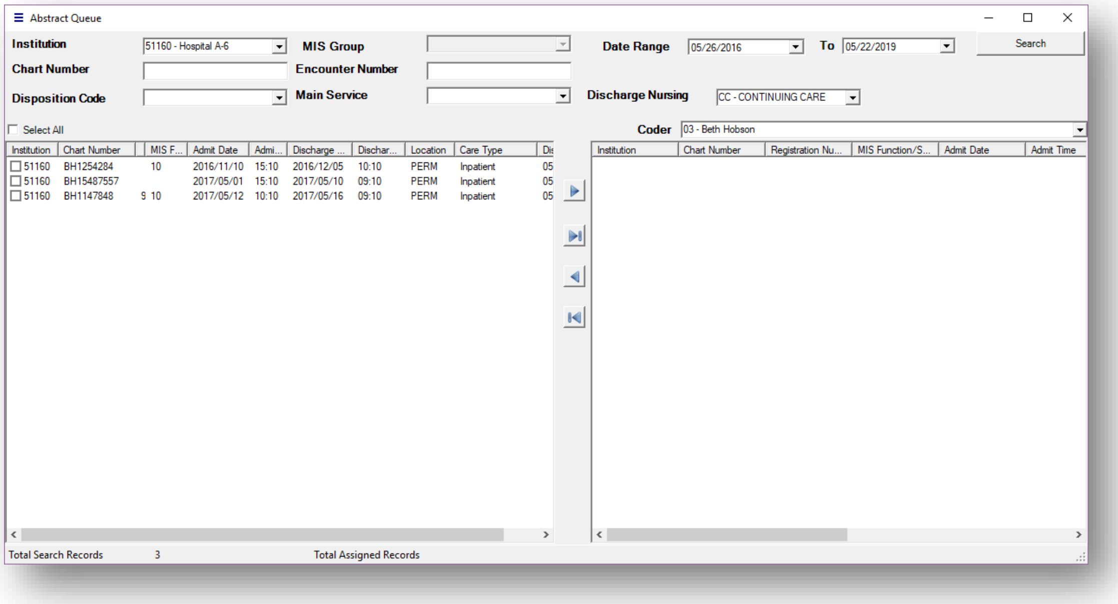
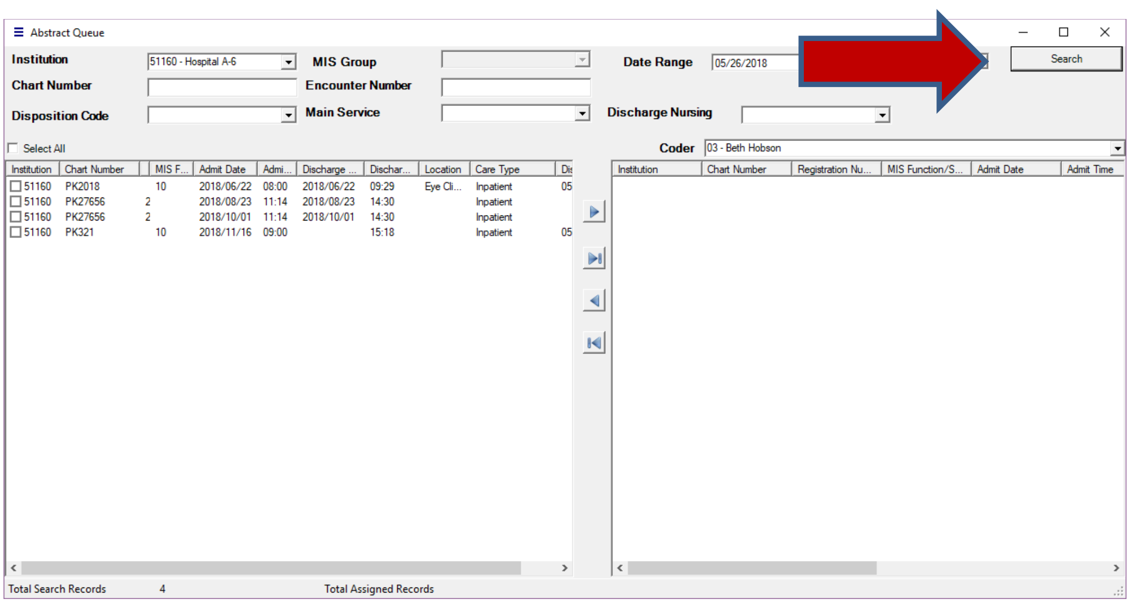


Figure 335 Abstract Queue - Search by Discharge Nursing Area

Click the **Search** button to search based on the parameters entered in the search fields. The search parameters entered are saved from one session to the next.



Search Results

Charts returned by the Search will be shown in the search results panel on the left side of the Abstract Queue window. The search will return incomplete records for the date range entered. The following information is given for each result:

- Institution Number
- Chart Number
- Registration Number
- MIS Functional Centre/Service
- Admit Date
- Admit Time
- Discharge Date
- Discharge Time
- Location – Current Location for Chart Locator module
- Care Type
- Disposition Code

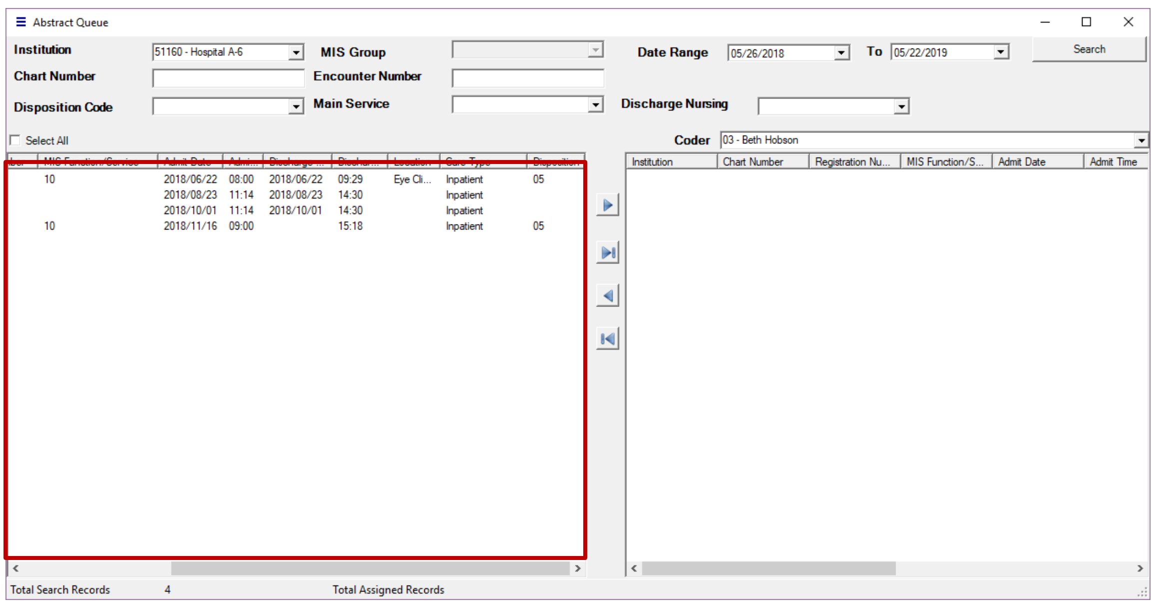


Figure 336 Abstract Queue - Search Results

Assigning Records to Coders

Charts can be assigned by a Coder to themselves or can be assigned to other Coders by an Administrator. Users must have proper permissions for to assign visits.

Selecting a Coder

If a User is ***not*** an Administrator, the Coder field will allow the user to select only their own profile (User number) and name from the drop-down list in order to assign records to themselves for completion.
If a User is an Administrator, all Users will be shown in the Coder list. The Administrator can then click the dropdown arrow next to the Coder list and use the mouse to select a Coder to assign records. The arrow keys can also be used to move through the Coder list.

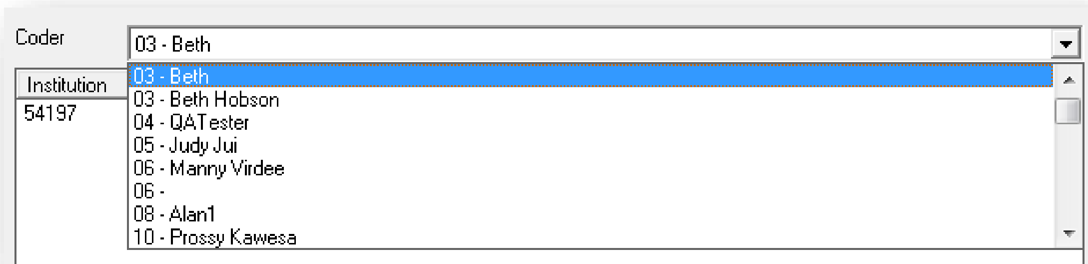


Figure 337 Abstract Queue - Selecting a coder

A coder must be selected from the Coder list before records can be assigned to them. This also applies for users who are not Administrators; a user must select their own user number and name from the Coder list before they can begin assigning records to themselves.

When a user is selected from the Coder list, the Abstract Queue window will show any incomplete records that are currently assigned to that Coder.

Assigning a Record to a Coder

To assign a record to a Coder, select the record or records returned by the Search from the left side of the

Abstract Queue window and use the arrow  to move the selected record(s) under the Coder name on the right side of the Abstract Queue window.

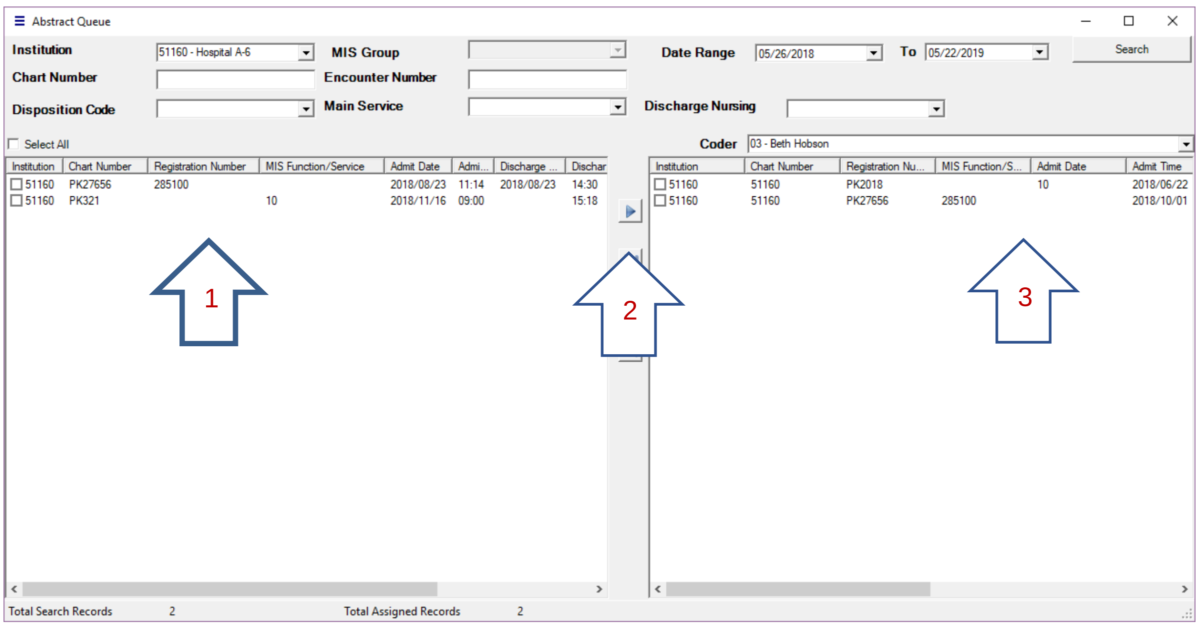
The arrow  can be used to assign all records showing in the search results to the selected Coder at once.

Once abstracts are assigned to a Coder, the information for that record no longer appears in the left side of the Abstract Queue window and now only appears on the right under the Coder's name. The Abstract Queue will automatically save this information to the database.

Any abstracts that have been assigned to a Coder will remain assigned to them until the abstract is complete (i.e. verified and saved).

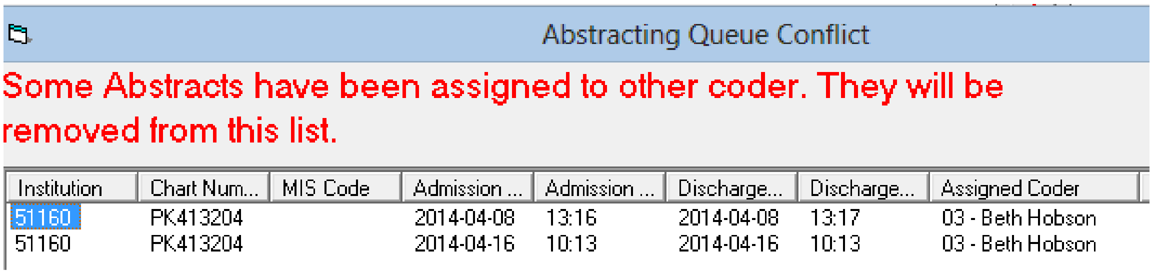
Selecting a Coder from the Coder list will show any previously assigned records that are not complete.

Steps to Assign a Record to a Coder:



1	Select the record from the search results in the left panel of the Abstract Queue.
2	Click the single arrow › to move only the selected record(s) or the double arrow » to move all records over to the Coder's assigned list.
3	The selected records now appear on the right panel under the selected Coder's name.

In the event more than one User tries to assign the same abstract to themselves at the same time, the second user who is attempting to assign the record will be presented with a message that the selected record will be removed from their list.

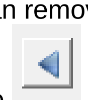


Opening an Assigned Record

Records that have been assigned to a Coder can be quickly opened in the appropriate module by double-clicking on the record in the assigned area of the Abstract Queue window. The Coder can now begin completing the record.

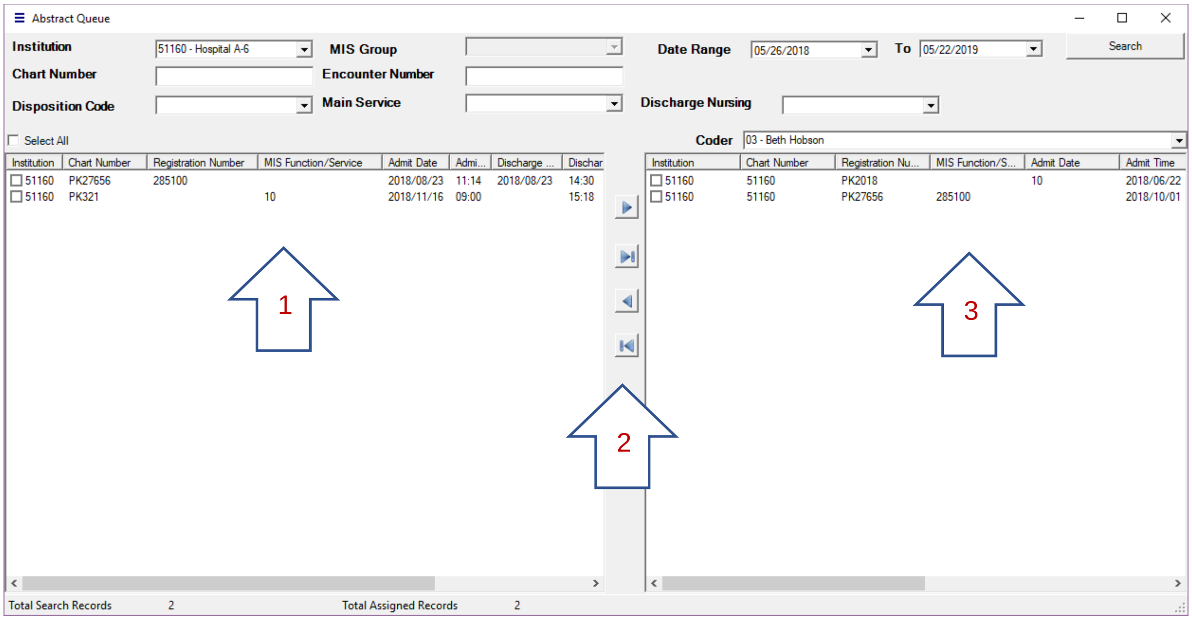
Once the abstract is complete (i.e. verified and saved), it will be removed it from the Coder's assigned list in the Abstract Queue window.

Removing an Assigned Record

Similar to the process for assigning records, a Coder can remove an incomplete record from their assigned list in the Abstract Queue window by using the . arrow All records assigned to a coder can be removed using the  arrow.

Records that are removed from a Coder's assigned list on the right panel are returned to the left search results panel.

Steps to Remove an Assigned Record from a Coder:



1	Select the record to be removed from the Coder's assigned record list in the right panel of the Abstract Queue.
2	Click the single arrow  to remove only the selected record(s) or the double arrow  to move all records back to the search panel.
3	The records are returned to the left panel.

Enable Abstract Queue

An Admin user can define whether a Coder will be able to choose any abstract on the queue or only the next available by check/uncheck in the field 'Select abstracts in Abstract Queue' In their User Profile. A Coder will be allowed to select abstracts from the queue if the field is checked. If the user's permission is unchecked, the coder can only select next available abstracts in the Queue. All other abstracts will be disabled.

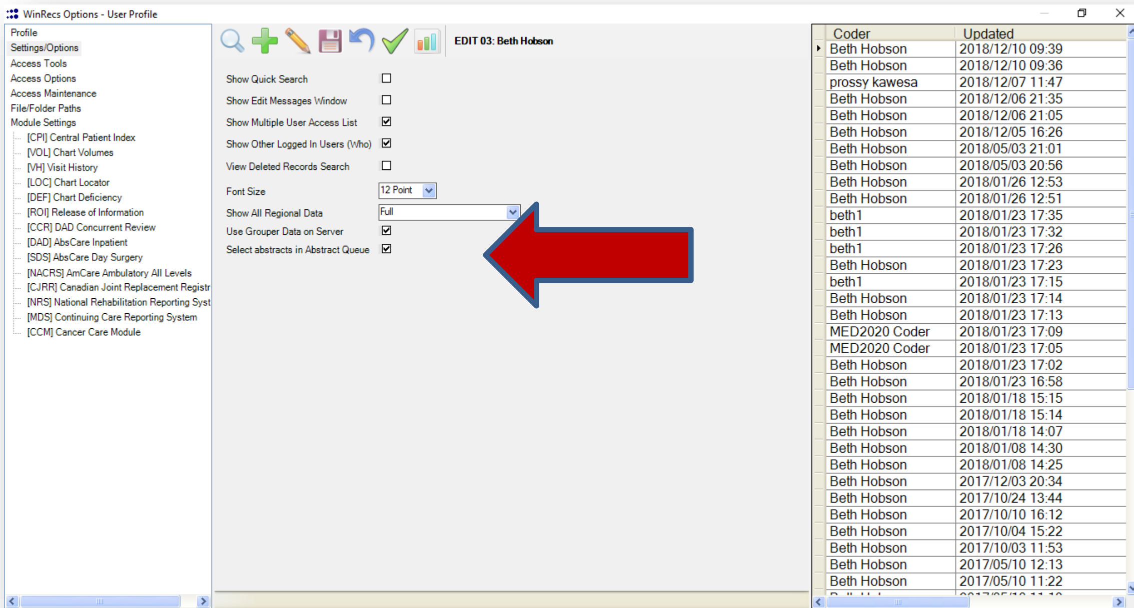


Figure 338 Abstract Queue - User Profile

Assigning Next Available Abstract

Scenario 1: *Is Administrator* = Checked and *Can Select abstracts in Abstract Queue = Checked* Allows the User to see ALL Coder and assign abstracts from Queue to Coder task list.

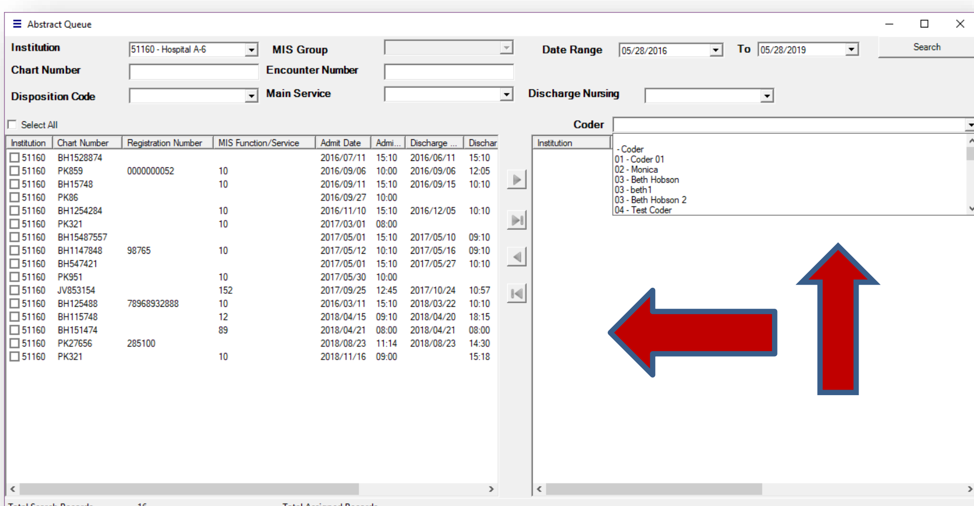


Figure 339 Abstract Queue - Assigning Next Available Abstract Scenario 1

Scenario 2: *Is Administrator = Unchecked and Can Select abstracts in Abstract Queue = Unchecked*
User can only see the next available abstract in the Queue and transfer abstract to their task list. All other abstracts in the Queue will not display.

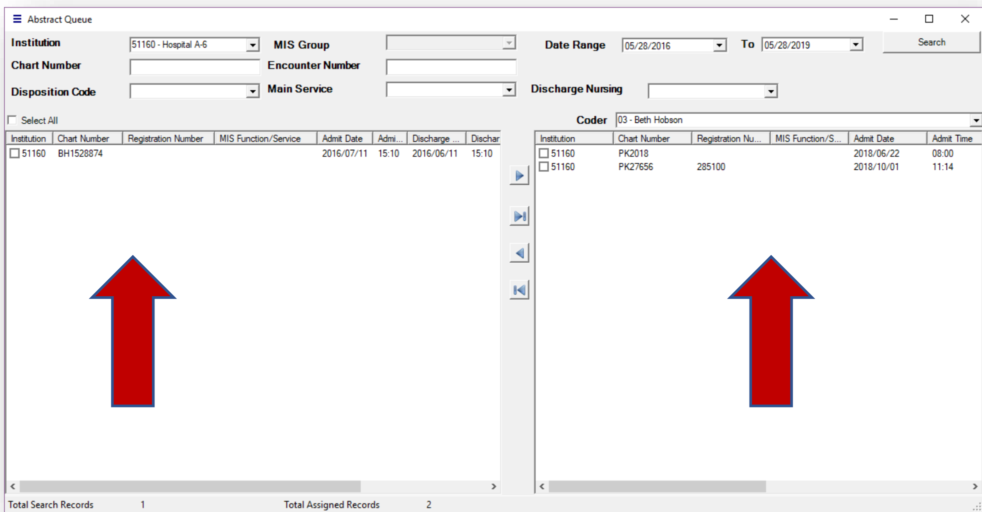


Figure 340 Abstract Queue - Assigning Next Available Abstract Scenario 2

Scenario 3: *Is Administrator = Unchecked and Can Select abstracts in Abstract Queue? = Checked*

User can only select abstract for their own coder number.

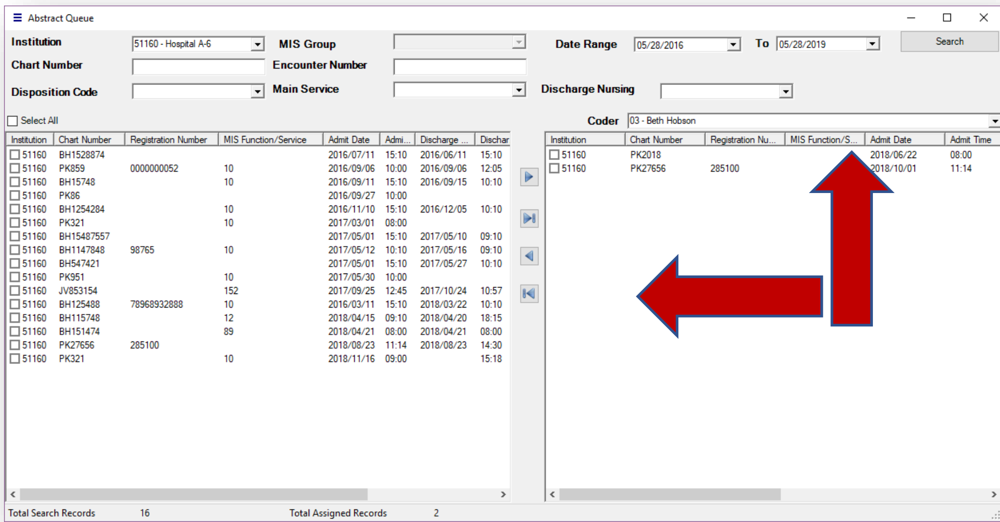


Figure 341 Abstract Queue - Assigning Next Available Abstract Scenario 3

6.11 CJRR – Hips & Knees

The **Canadian Joint Replacement Registry (CJRR)** module is a data collection tool within WinRecs suite of modules that allows for the specific collection of joint replacement data as set out by the Canadian Institute for Health Information for their CJRR Registry. This registry focuses exclusively on gathering data related to knee and hip interventions as captured by the following CCI codes:

1.VA.53.^^ – Implantation of internal device, hip joint

1.SQ.53.^^ – Implantation of internal device, pelvis

1.VG.53.^^ - Implantation of internal device, knee joint

1.VP.53.^^ - Implantation of internal device, patella

Each facility must supply CIHI with a list of their orthopedic surgeons prior to using CJRR. CIHI assigns a unique CJRR Surgeon ID, that identifies the surgeon regardless of where the surgery is done. This number is placed in **Provider Maintenance.**

6.11.1 CJRR Legacy

CJRR records can be created in one of three ways:

1. Creating manually through the CJRR modules
2. Creating through a DAD or NACRS abstract
3. Creating through a Batch interface or HL7 from an OR system

Creating Manually Through the CJRR Modules

- Go to **WinRecs Module Menu→ [CJRR] Hip Canadian Joint Replacement** or **[CJRR] Knee Canadian Joint Replacement**

  – Or –

- **Modules→Abstracting→ [CJRR] Hip Canadian Joint Replacement** or **[CJRR] Knee Canadian Joint Replacement**
- Press **[F5]** to create a new record or **[F4]** for an already existing CJRR record
- The abstract will come up with any common data elements from the **CPI MODULE**
- Move through the abstract and fill any fields that are required.
- Error messages will display for mandatory elements in the message list box.

Creating Through a DAD or NACRS Abstract

1. Complete a **DAD/SDS/NACRS** abstract
2. The following Criteria must be met in order for a **CJRR** form to be triggered:
   - Intervention code is one of the following:
     - 1.VA.53.^^ – Implantation of internal device, hip joint

    - 1.SQ.53.^^ – Implantation of internal device, pelvis
    - 1.VG.53.^^ - Implantation of internal device, knee joint
    - 1.VP.53.^^ - Implantation of internal device, patella
  - Includes Knee and Hip replacements that are:
    - Emergency or elective
    - Total or partial
    - Primary or revision
  - Intervention date must be greater than or equal to April 1, 2012
  - Intervention Attribute Status does not equal "A" – Abandon after onset
- If the above criteria are met the following message will pop up when you save the record:

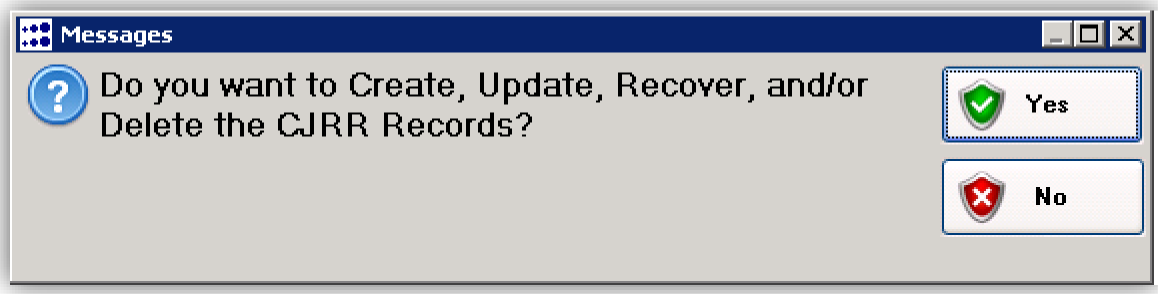


Figure 342 – CJRR Record Message

- Clicking 'No' will take you back to the abstract, clicking 'Yes' will take you to the CJRR Links Screen:

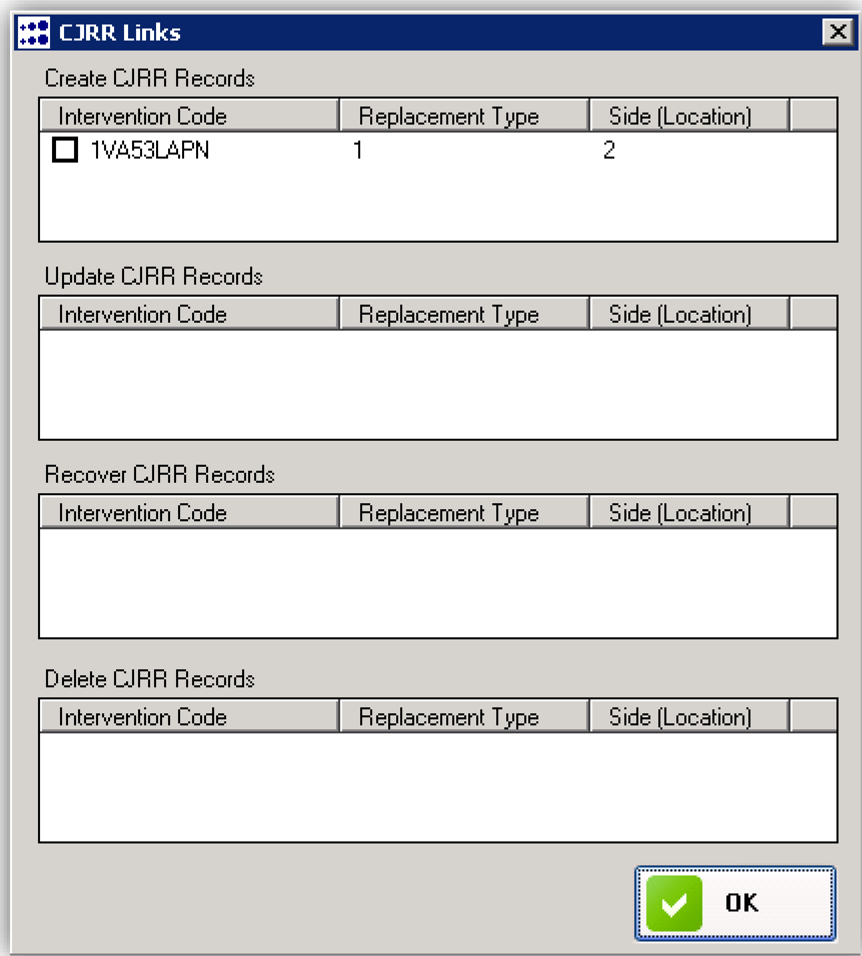


Figure 343 – CJRR Links

- `Create` – this section is used to create a new **CJRR** record. The box must be checked in order for the **CJRR** form to open up (depending on the intervention code). If the box is not checked the record will be flagged as incomplete and placed on the Incomplete Report. Press OK to confirm the response.
- `Update` – this section is used to update an existing **CJRR** record and there has been a change on the **DAD/SDS/NACRS** record. The box must be checked in order for the **CJRR** form to open up. If the box is not checked the record will be flagged as incomplete and placed on the Incomplete Report. Press OK to confirm the response.
- `Recover` – this section is used when you have deleted a **CJRR** record and want to recover it from the purge file. This is useful when the **CJRR** record has been accidentally deleted and need to recover it. The box must be checked in order to recover it.
- `Delete` – this section is used for deleting the records and moving them to the purge file
- Click **OK** button with nothing checked will take you back to abstract. If the file is checked in the `Create` and `Update` mode, the appropriate **CJRR** record will display.

- The information from the abstract will populate the appropriate fields and the user will need to populate the OR fields as required. The record can be saved with mandatory fields missing and the errors will be displayed in the `Message List` box.

Link CJRR Record to an Abstract

- The abstract (DAD or NACRS) to be linked to the CJRR record should already be created and the CJRR record should also already exist with the same criteria as listed:
  - Chart Number
  - Institution Number
  - Admissions Date
  - Admissions Time
- Open the CJRR Record.
- From the CJRR Menu options select Action - Link CJRR Record to Abstract.

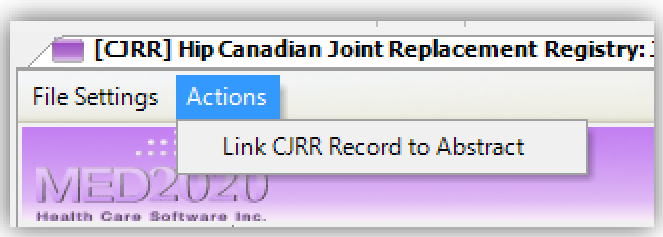


Figure 344 - CJRR Actions Menu

- A window will open with the list of valid abstracts to link to the CJRR Record. Choose the abstract that is to be linked to the CJRR Records and Click OK.

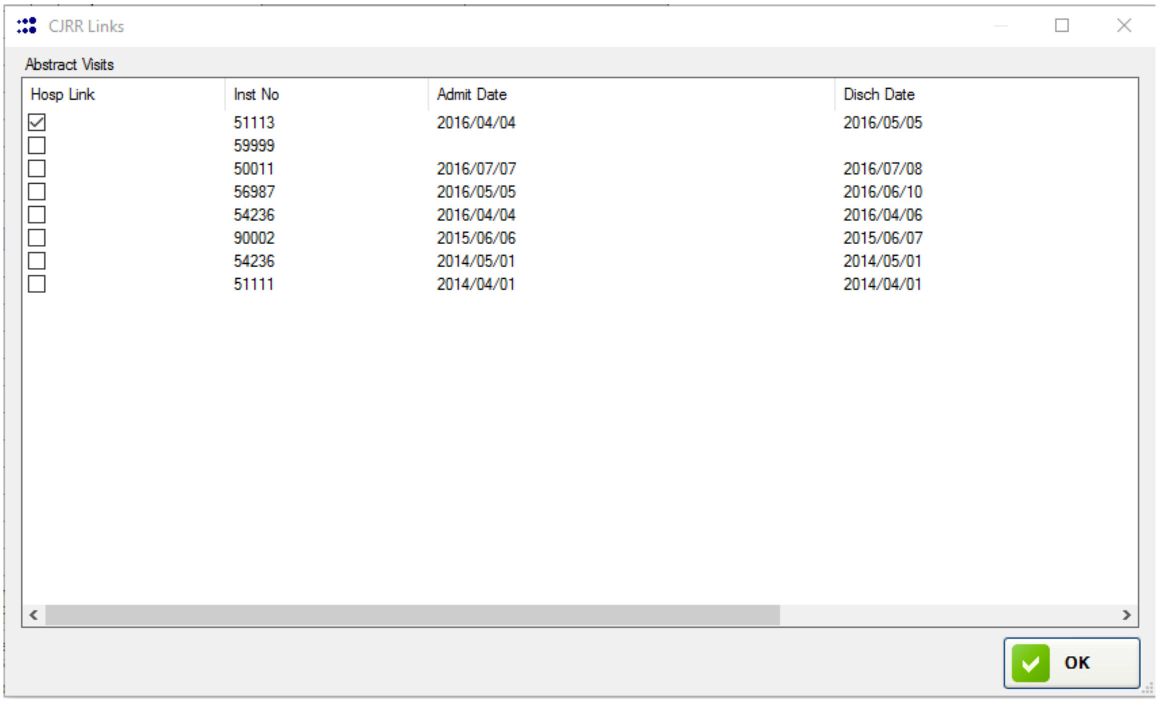


Figure 345 - CJRR List of Abstracts

- User is then presented with the following screen to update the CJRR Record. Select the intervention code and click ok. The Abstract and CJRR Records are now linked.

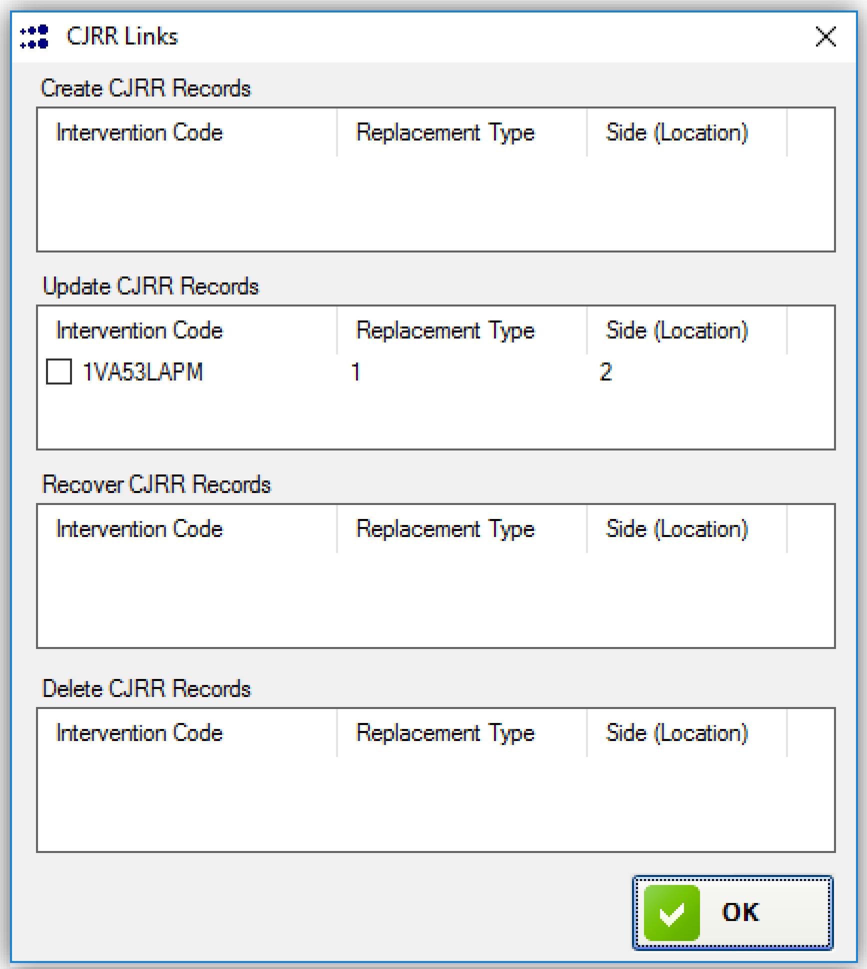


Figure 346 - CJRR Link window

Creating Through a Batch Interface or HL7 from an OR system

- Batch Interface (BI)

  MED2020 provides a standardized file layout of a flat file that must be followed. The clients Operating Room (OR) system will generate a file based on the specifications provided by MED2020 and will load the file into a centralized location accessible to the WinRecs application. This will be loaded into WinRecs via the Tools/Batch Interface.

- HL7

  The ADT HL7 feed will send across demographic only information as well as the record type entered into ZZ-Segment. MED2020 will work with the organization to determine which ZZ-Segment will need to be populated in order for the record type to be populated correctly. MED2020 will provide the record type values in an Excel Spreadsheet.

6.11.2 CJRR DAD (Discharge Abstract Database)

Enable CJRR Multiform

To enable the CJRR Multiform got to:

- **Options → Institution Profile → Settings**
- Press  or **[F4]** to find the facility the CJRR multiform is to be added and double click on the facility
- Press  or **[F6]** to edit
- Click on the box next to 'Use CJRR Worksheet' and ensure there is a checkmark

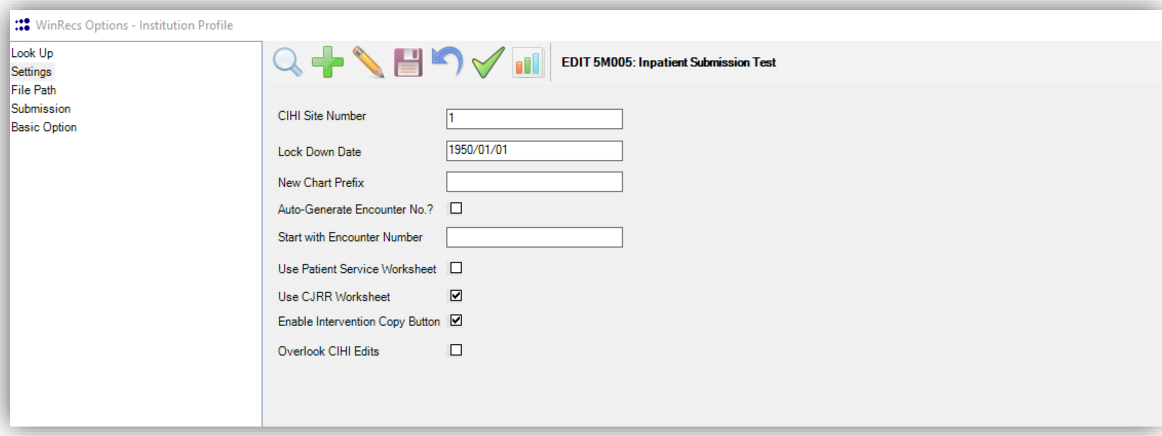
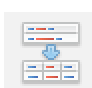
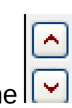


Figure 347 – Use CJRR Worksheet

- **Options → Control File**
- Press  or **[F4]** to choose the user or user profile, double click on the user
- Click on **[DAD] AbsCare Inpatient**
- Click on  - Group Headers
- On the left-hand side find and click on the header **Canadian Joint Replacement Registry (CJRR)**
- Ensure the Enabled and Visible fields have a checkmark beside them
- If desired, to move the header/multi-form to a different area of the abstract press the  and place on top or below the desired header. It is suggested to place the CJRR multiform after the **Intervention Data** header.

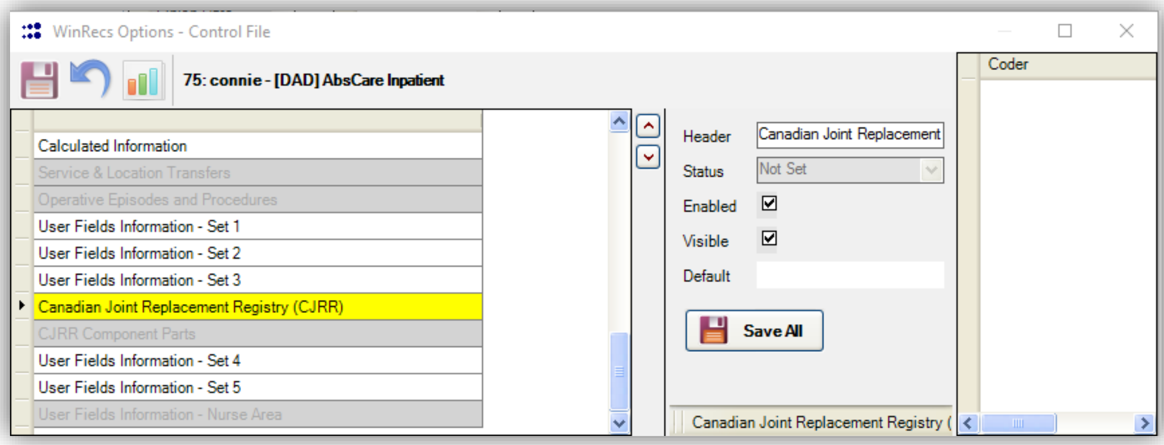
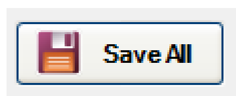


Figure 348 – CJRR Multiform – Enable and Visible

- Press  to save or Press 

to save for all users.

Activate CJRR Multiform

The following criteria and fields from the Intervention Data multiform must be met in order for a **CJRR** multiform to be triggered:

- Intervention code is one of the followings:
    - 1.VA.53.^^ – Implantation of internal device, hip joint
    - 1.SQ.53.^^ – Implantation of internal device, pelvis
    - 1.VG.53.^^ - Implantation of internal device, knee joint
    - 1.VP.53.^^ - Implantation of internal device, patella
- Includes Knee and Hip replacements that are:
    - Emergency or elective
    - Total or partial
    - Primary or revision
- Intervention date must be greater than or equal to April 1, 2018
- Intervention Attribute Status does not equal “A” – Abandon after onset
- The field ‘Intervention Joint Identifier’ must be populated with a ‘1’, if there are 2 CJRR intervention codes, then the second intervention will be populated with a ‘2’. The 1 and 2 values cannot be entered more than once.
- If there is a Revision coded, ‘Revision Reason’ field must be populated.

If the **CJRR multiform** is placed after the Intervention Data multiform, then press F12 Next to open the **CJRR multiform**

Or

Go to the main grid and double click on **Canadian Joint Replacement Registry (CJRR)** header.

Canadian Joint Replacement Registry (CJRR) Multiform

Please see CIHI guidelines on how fields are to be completed:

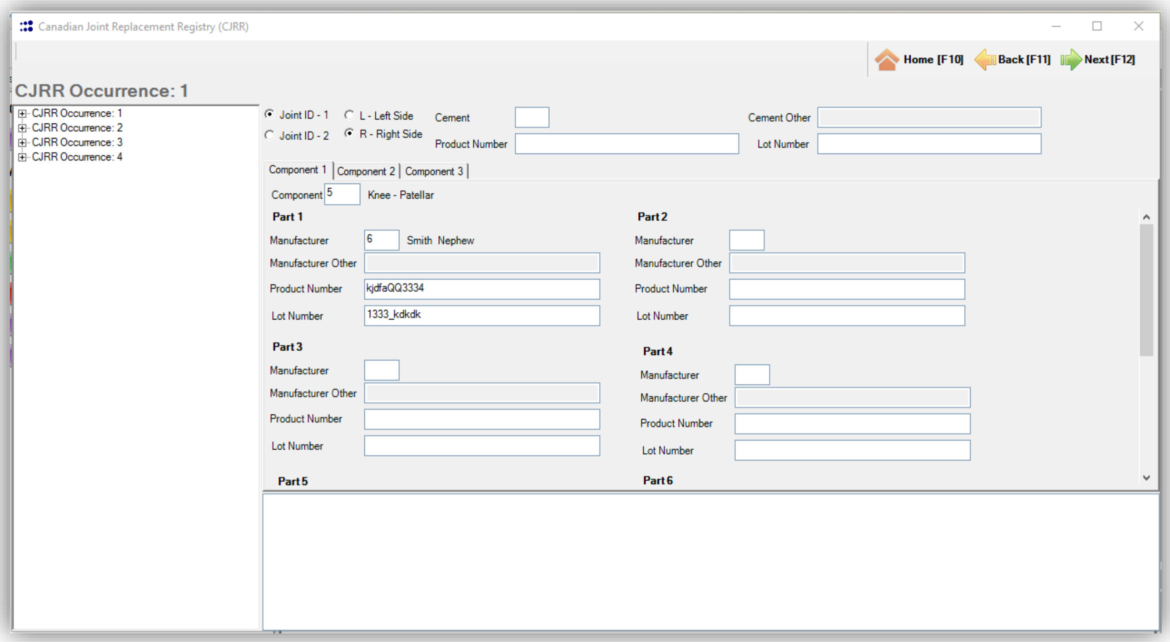
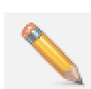


Figure 349 – Canadian Joint Replacement Registry (CJRR) Multiform

6.11.3 CJRR NACRS (National Ambulatory Care Reporting System)

Enable CJRR Multiform

To enable the CJRR Multiform got to:

- **Options → Institution Profile → Settings**
- Press  or **[F4]** to find the facility the CJRR multiform is to be added and double click on the facility
- Press  or **[F6]** to edit
- Click on the box next to ‘Use CJRR Worksheet’ and ensure there is a checkmark

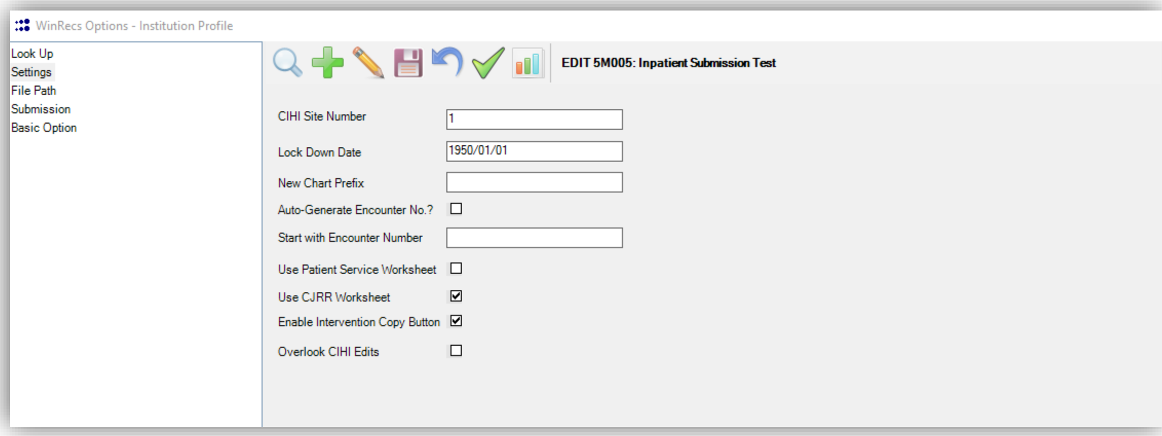
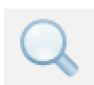
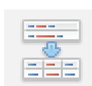
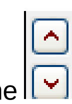


Figure 350 – Use CJRR Worksheet

- **Options → Control File**
- Press  or **[F4]** to choose the user or user profile, double click on the user
- Click on **Abstracting/[NACRS} Level 3 AmCare Ambulatory**
- Click on  - Group Headers
- On the left-hand side find and click on the header **Canadian Joint Replacement Registry (CJRR)**
- Ensure the Enabled and Visible fields have a checkmark beside them
- If desired, to move the header/multi-form to a different area of the abstract press the  and place on top or below the desired header. It is suggested to place the CJRR multiform after the **Intervention Data** header.

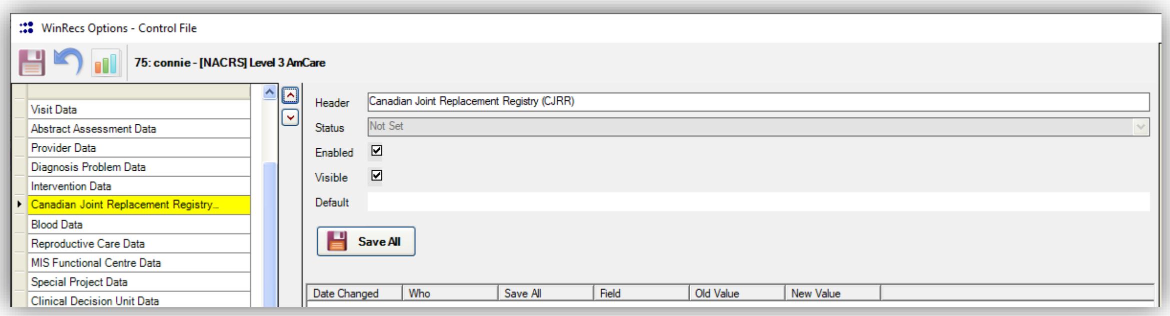
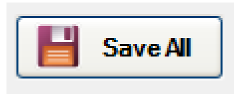


Figure 351 – CJRR Multiform – Enable and Visible

- Press  to save or Press 

to save for all users.

Activate CJRR Multiform

The following criteria and fields from the Intervention Data multiform must be met in order for a **CJRR** multiform to be triggered:

- Intervention code is one of the followings:
  - 1.VA.53.^^ – Implantation of internal device, hip joint
  - 1.SQ.53.^^ – Implantation of internal device, pelvis
  - 1.VG.53.^^ - Implantation of internal device, knee joint
  - 1.VP.53.^^ - Implantation of internal device, patella
- Includes Knee and Hip replacements that are:
  - Emergency or elective
  - Total or partial
  - Primary or revision
- Intervention date must be greater than or equal to April 1, 2022
- Intervention Attribute Status does not equal “A” – Abandon after onset

If the **CJRR multiform** is placed after the Intervention Data multiform, then press F12 Next to open the **CJRR multiform**

Or

Go to the main grid and double click on **Canadian Joint Replacement Registry (CJRR)** header.

Canadian Joint Replacement Registry (CJRR) Multiform

Please see CIHI guidelines on how fields are to be completed:

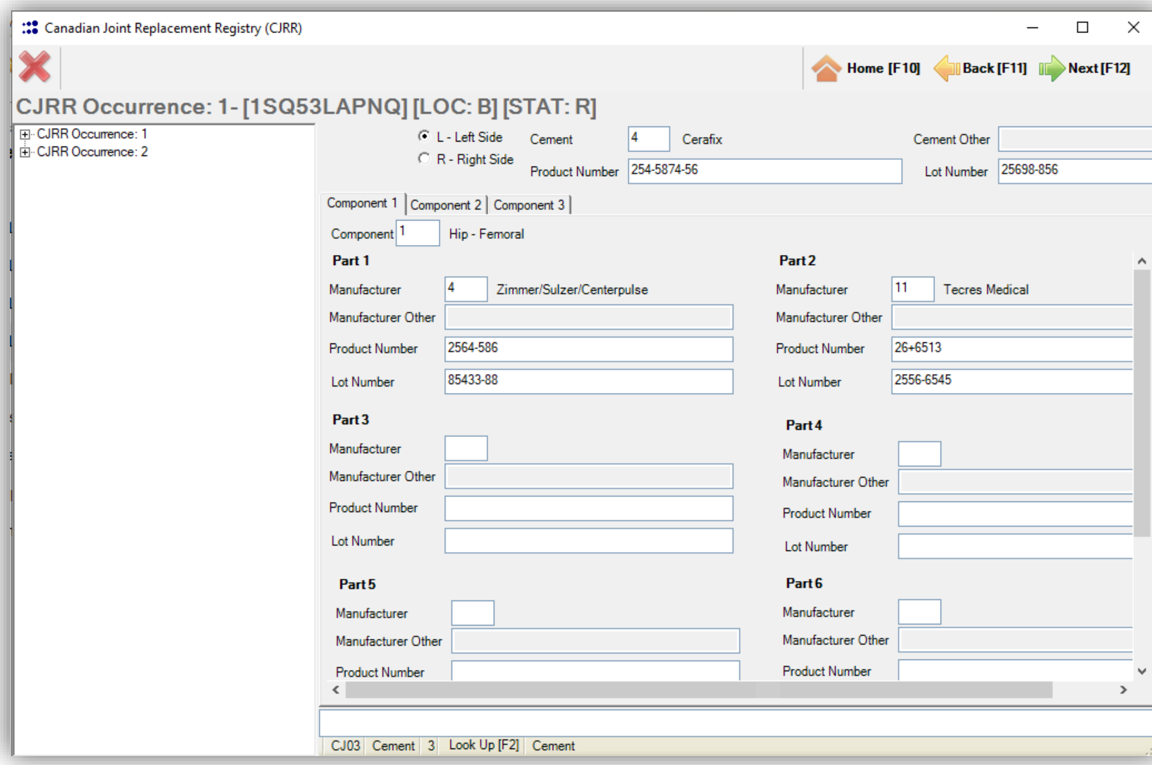


Figure 352 – Canadian Joint Replacement Registry (CJRR) Multiform

6.12 Specialized Fields

Some regions/sites have specialized fields that are required by their province, health region or individual site.

Manitoba – Multi-forms

All Manitoba multi-forms are to be filled out as per Manitoba Health guidelines. The multi-forms will function the same as all other multi-forms. See Multi-forms

MADE Patient Transfer Service Worksheet

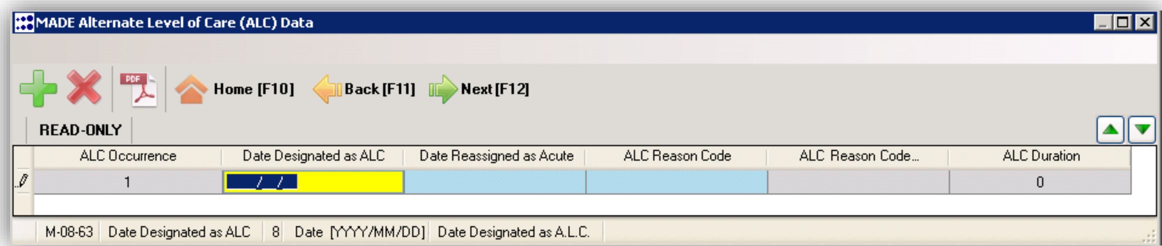


Figure 353 – MADE Patient Transfer Service Worksheet Multi-form

MADE Alternate Level of Care (ALC) Data

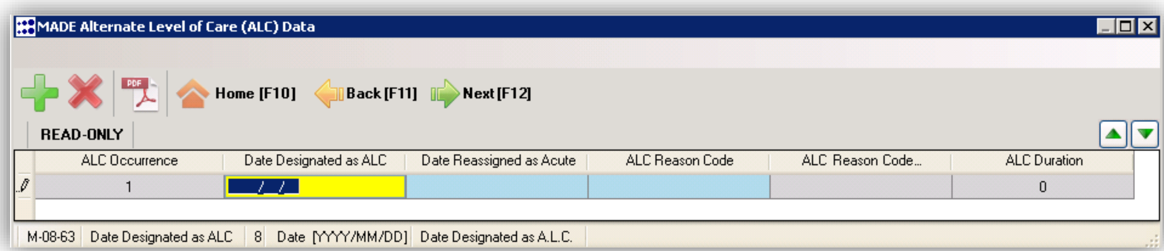


Figure 354 – MADE Alternate Level of Care (ALC) Data Multi-Form

MADE Designation non-ALC Delay Data

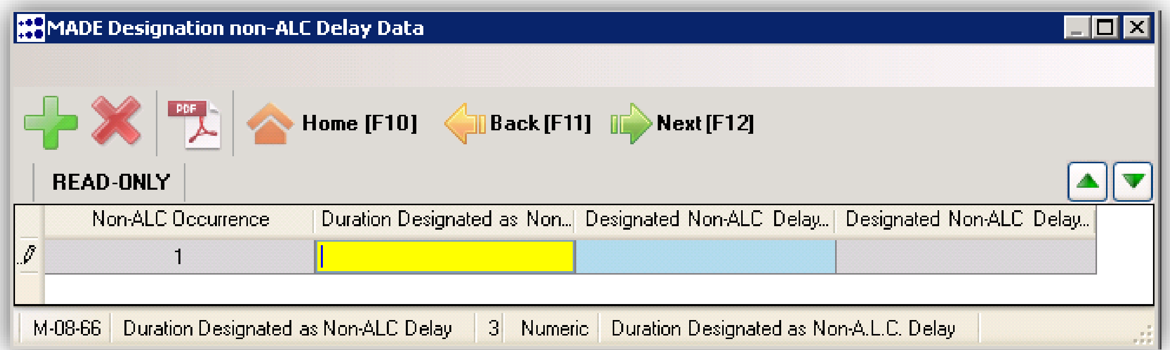


Figure 355 – MADE Designation non-ALC Delay Data Multi-Form

MADE Supplemental (Facility Study) Data

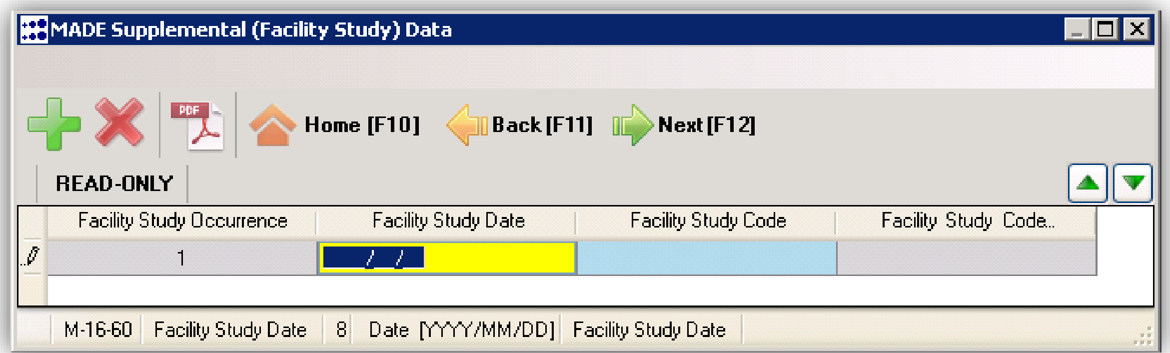


Figure 356 – MADE Supplemental (Facility Study Data) Multi- Form

Manitoba – Main Grid

All fields are to be filled out as per Manitoba Health Guidelines. Data Entry into these fields are the same as WinRecs Navigation and Look Up Section. These fields can also be moved elsewhere within the main grid of the abstract as described Changing Sort Order – Main Grid.

MADE Abstract Data

MADE Abstract Data		
Abstract Type		
Declaration Number		
ER Date of Arrival		
ER Time of Arrival		
Transfer From Facility...		
Transfer To Facility Number		
Elopements		
Leave Certificates		
Autopsy		
** ALC Duration	0	

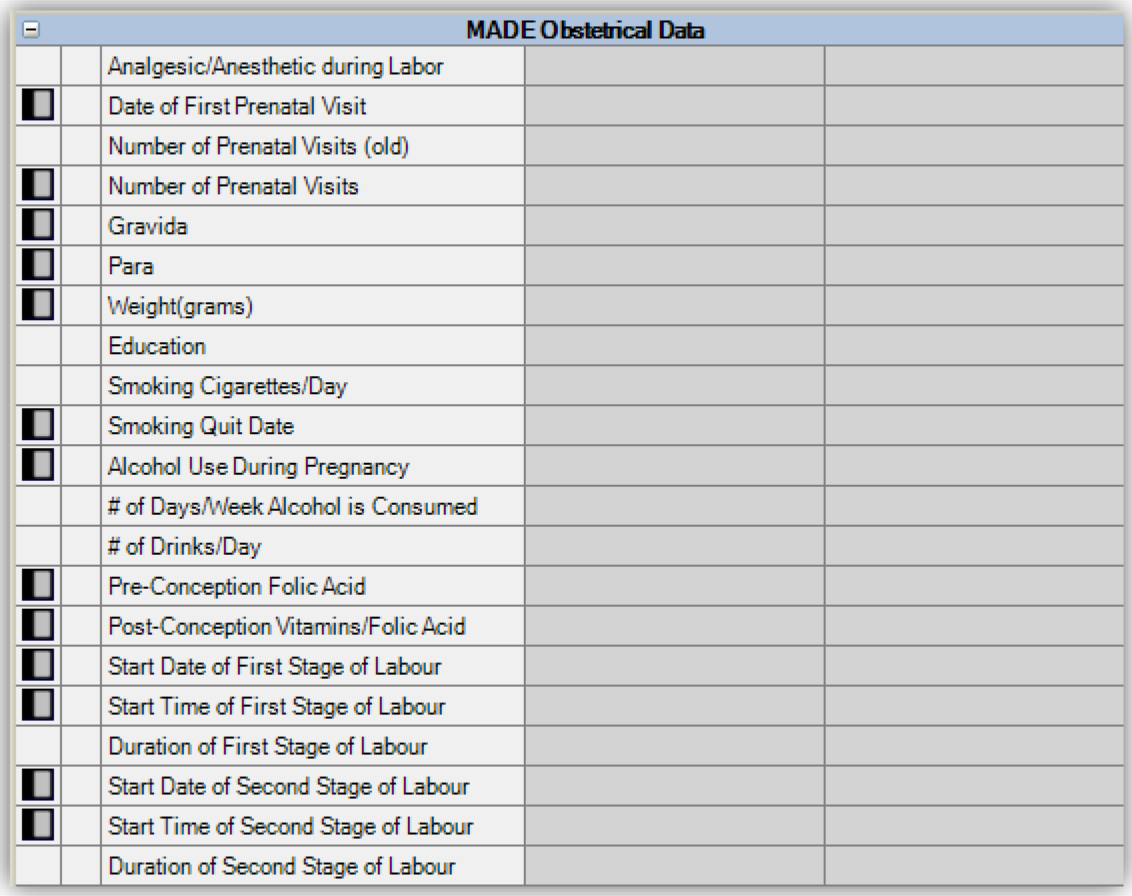
Figure 357 – MADE Abstract Data – Main Grid

MADE Demographic Data

MADE Demographic Data		
Previous Name		
Telephone Number		
Declaration Home Address...		
Declaration Home Address...		
Patient/Registrant Employer		
Registrant Surname		
Registrant Given Name		

Figure 358 – MADE Demographic Data – Main Grid

MADE Obstetrical Data



MADE Obstetrical Data		
Analgesic/Anesthetic during Labor		
Date of First Prenatal Visit		
Number of Prenatal Visits (old)		
Number of Prenatal Visits		
Gravida		
Para		
Weight(grams)		
Education		
Smoking Cigarettes/Day		
Smoking Quit Date		
Alcohol Use During Pregnancy		
# of Days/Week Alcohol is Consumed		
# of Drinks/Day		
Pre-Conception Folic Acid		
Post-Conception Vitamins/Folic Acid		
Start Date of First Stage of Labour		
Start Time of First Stage of Labour		
Duration of First Stage of Labour		
Start Date of Second Stage of Labour		
Start Time of Second Stage of Labour		
Duration of Second Stage of Labour		

Figure 359 – MADE Obstetrical Data – Main Grid

MADE Newborn Data

MADE Newborn Data		
Presentation at Delivery (old)		
Presentation at Delivery		
Position at Delivery		
Routine Care		
Free Flow Oxygen		
Bag + Mask Ventilation for Resuscitation		
Intubation for Reasons Other than...		
Medications Administered for...		
Narcan/Naloxone Administration		
Chest Compression		
Feeding		
Meconium		
Apgar 1 Minute		
Apgar 5 Minute		
Gestation		
Mothers PHIN number		

Figure 360 – MADE Newborn Data – Main Grid

6.13 Cancer Care Module – (CCM)

Figure 361 - Cancer Care Module Header

The Cancer Care module is a data collection tool within the WinRecs suite of modules, sharing a common Central Patient Index and allowing the collection of cancer care data specific to the Disease Registration

To clarify, a patient is not registered with Cancer Care Ontario on each visit. They are registered once with Cancer Care Ontario per Primary Disease which is captured in the CCM module. Once the registration is received and processed, what Cancer Care Ontario gets sent is updates to the registration or disease information or the visit related information which is referred to as ALR reporting information (Activity Level Reporting) which is captured in NACRS.

Please refer to the **Basic WinRecs Functionality** section of the User Guide for details on the record layout and functionality.

To open the [CCM] Cancer Care Registration

- Select the menu option Module Abstracting → [CCM] Cancer Care Registration

— or —

- o Select WinRecs Module Menu → Abstracting→ [CCM] Cancer Care Registration

Go to Cancer Care Module
F4 and search for an Interfaced in patient
F5 and create a NEW entry for this disease registration
F7 SAVE your registration

CCM Disease Registration

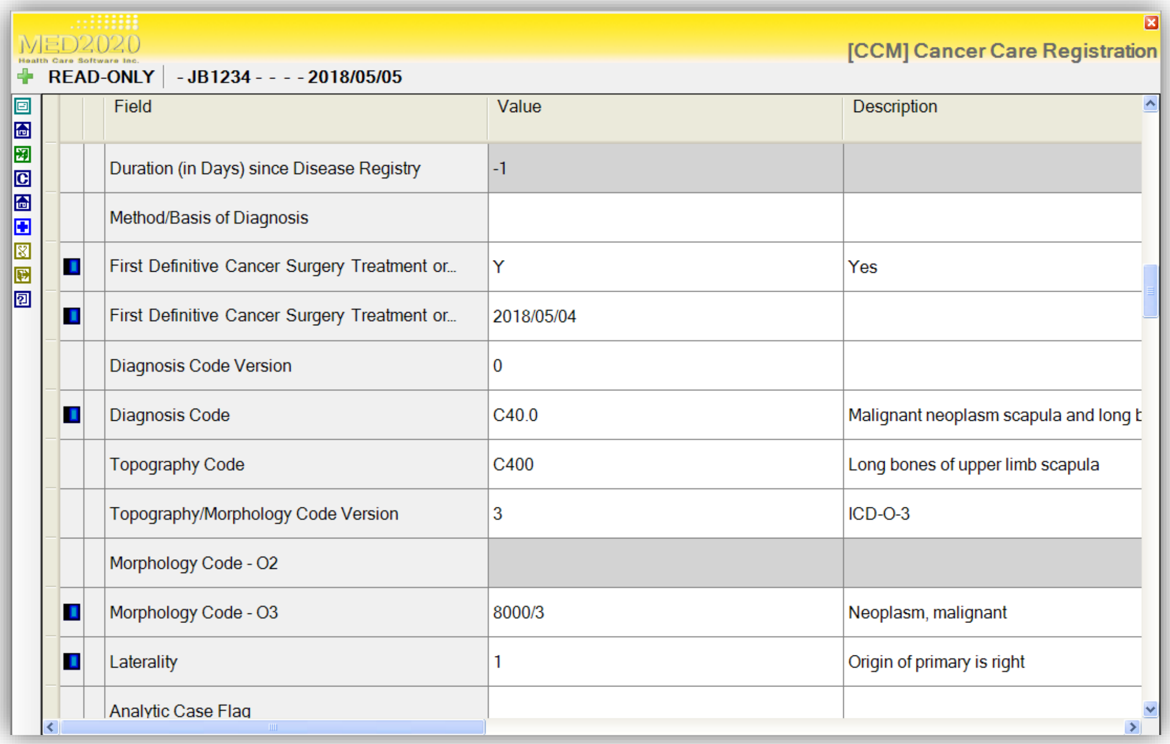


Figure 362 - Cancer Care Module – Disease Registration

The disease registration is captured in the CCM module. Mandatory fields required to save an CCM record are:

- Chart Number
- Master Hospital Number
- Disease Registration Date.

In the CCM record, this is where the disease registration is collected which includes; the demographic information, providers, disease details, Dates of Referrals and Staging information.

CCM Activity Level Reporting (NACRS)

Patient visits for the disease registration will be created in the NACRS module. Additional Cancer Care fields have been added to the standard NACRS module to allow you to enter the Chemo and Radiation Treatment fields required for visit level reporting.

MED2020 Health Care Software Inc. [NACRS] Level 3 AmCare

READ-ONLY | 54236 - 4534534 - JB1234 - 712106500 - 2018/05/06 - - - 16

Field	Value	Description
CCM Cancer Care Information		
CCM Cancer Care Visit	2018/05/05	59876: CCM Seq:1, Chart Number: JB1234
CCM Visit Program Code	SYS	Systemic Therapy
CCM Visit Type	GV	Group Visit - Virtual (clinic visit done in a virtual group format, ie
CCM Inpatient Flag	N	No
CCM Radiation Review Flag	R	Radiation Review
CCM Chemo Flag	Y	Yes
CCM Clinical Trial Flag	Y	Yes
CCM HealthCare Provider Number	00326	Dr. 00326
CCM Systemic Drug Delivery Event		
CCM Drug Occurrence Count	0	
CCM Arrived by Not Treated Flag		
CCM Radiation Planning / Treatment Activity		
CCM Course of Radiation Treatment		
CCM Course Complete Flag		
CCM NHPIP Code		

Figure 363 - Cancer Care Module – Activity Level Reporting

The NACRS CCM portion of the record is enabled when an applicable CCM MIS code is entered.

Visit MIS Functional Centre Account Code	712106500	Oncology Medical Nursing Unit

Next, the activity level reporting captured through NACRS is linked to the Cancer Care Module disease registration sequence. To link a NACRS record to a CCM registration, select the disease sequence from the field “CCM Cancer Care Visit.” If a patient has multiple disease registrations, the disease selected will be the disease that the NACRS visit is applicable to.

CCM Cancer Care Information		
CCM Cancer Care Visit	2018/05/05	59876: CCM Seq:1, Chart Number: JB1234

After the record has been linked to the CCM registration using the “CCM Cancer Care Visit” field, the CCM link will show up in the NACRS side bar

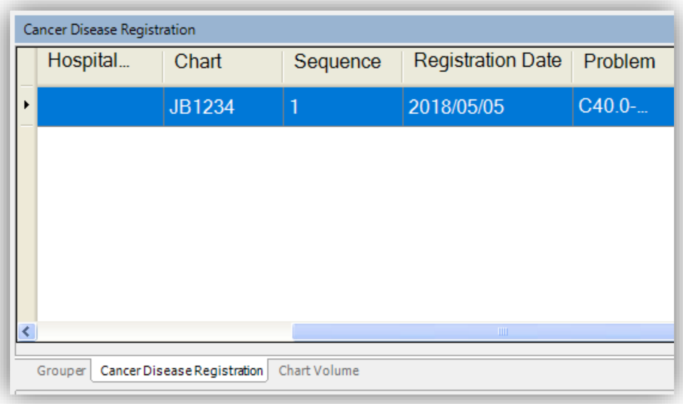


Figure 364 - Cancer Care Module Linking

Once a NACRS visit is linked to the CCM record using the “CCM Cancer Care Visit” field. The remaining CCM fields are enabled where the treatment details can be collected. This includes the drug and radiation treatments used during that hospital visit.

Submitting Data

Cancer Care Module Extract & Submission to CCO

See the Data Book for frequency expected in reporting and to confirm the extract required is what is within the Crystal Report.

Creation of submission files is performed via the WinRecs Report Generator. Data is extracted based on the parameter values presented and entered.

Specific submission reports for:

1) Disease Entity

2) NDFP Enrollment

3) Provider’s Entity

4) Patient Entity

…are available to run and export to the desired application, such as Microsoft Excel.

See the Report Manager section of the WinRecs User Guide for details on how to generate reports.

Pre-Designed Reports

These reports were developed in Crystal 8, specifically for use with the Cancer Care Module and for the purpose of providing a means to submit data following the Data Submission Specifications in the CCO Database 2007 – 2008.

CCM HealthCare Professional Submission Report.rpt – This report used to extract the data from the Cancer Care Module for the Healthcare Professionals Data Submission requirements as per the CCO Databook 2007 - 2008. View is selecting on HCP Program Code, HCP Status, and Main Provider Specialty. It is suggested report be set up to generate from the Provider Maintenance using Report Selection List. Once the report has been generated it is to be exported to Excel.

CCM Patient Submission Report.rpt – This report used to extract the data from the Cancer Care Module for the Patient Entity Submission data requirements as per the CCO Databook 2007 - 2008. The report uses a Registration date range parameter to select the date range for the data submission. Once the report has been generated it is to be exported to Excel.

CCM Disease Submisson Report.rpt – This report used to extract the data from the Cancer Care Module for the Disease Entity Submission data requirements as per the CCO Databook 2007 - 2008. The report uses a Registration date range parameter to select the date range for the data submission. Once the report has been generated it is to be exported to Excel.

CCM Incomplete Staging Data.rpt – This report extracts abstracts if the Clinical Staging at Diagnosis OR Pathological Staging at Diagnosis fields are not completed and are required as per the Diagnosis Code. Records grouped by Group Option parameter, ie: Data Entry/Coder, Registration Month or None. Detailed listing displaying Chart #, Full Name, Registration Date, Diagnosis Code and Description, Clinical and Pathological Staging fields with summary data on number of abstracts by Group and Grand Total.

CCM Incomplete Abstracts Report.rpt – This report extracts abstracts if the IsAbstractValidated is not equal to “Y”. Records grouped by Group Option parameter, ie: Data Entry/Coder, Registration Month, Incomplete Status or None. Detailed listing displaying Chart #, Full Name, Registration Date, Diagnosis Code and Description and incomplete status description with summary data on number of abstracts by Group and Grand Total.

CCM Patient Listing with Referral Dates.rpt – This report extracts Cancer Care Module abstracts within the Registration Date Range. The records are sorted by Registration Date. The detailed listing displays, Chart #, Full Name, Registration Date, Diagnosis Code and description, Clinical Staging at Diagnosis, Pathological Staging at Diagnosis, Medical Oncologist Referral Date, Radiation Oncologist Referral Date, Surgical Referral Date and Other Support Care Referral Date.

6.14 Clinical – MDS (Continuing Care Reporting System – CCRS)

CCRS is a clinical module used to collect clinical and demographic information on residents who receive services from hospital-based continuing care (extended, chronic care or complex care beds) or 24-hour residential care beds.

To open the Clinical Modules – [MDS-XX] Assessments

- Select the menu option **Module → Clinical → [MDS-XX]**

  — or —

- Select **WinRecs Module Menu → Clinical→ [MDS-XX]**

The module has 10 assessment types listed below:

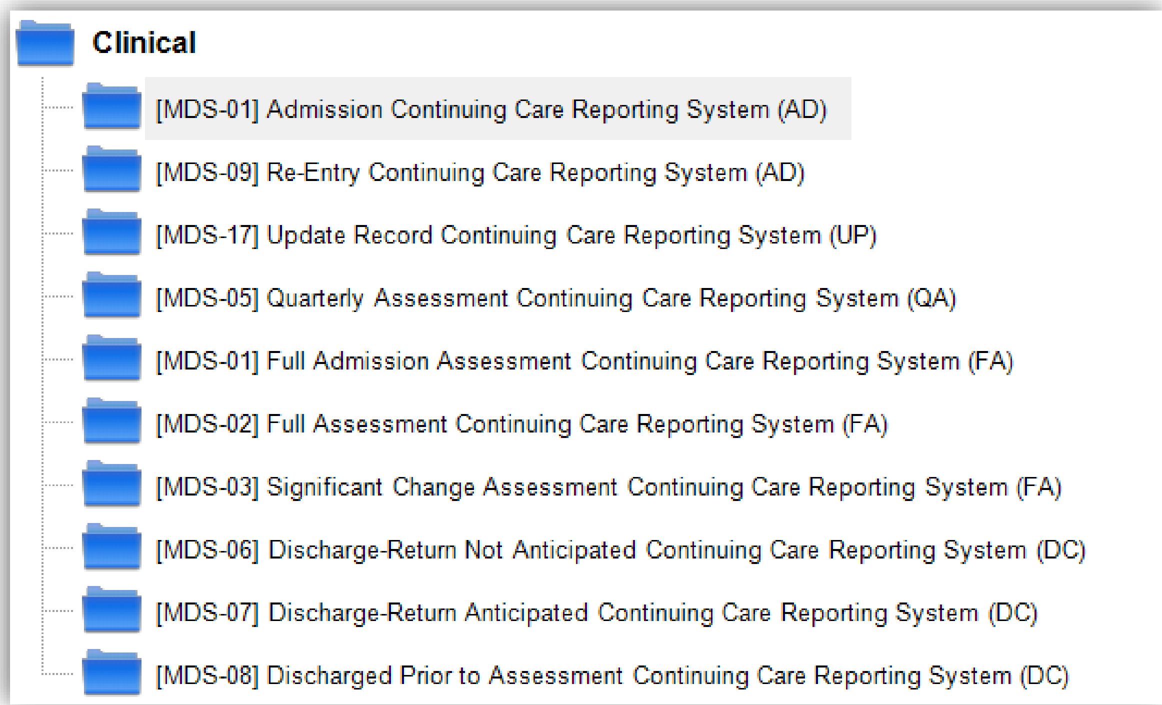


Figure 365 – Clinical MDS - Assessments

Assessment Type & Description

1. [MDS-01] Admission Continuing Care Reporting System (AD)
   - To be completed at any stage if changes or corrections to demographic information are required.
2. [MDS-09] Re-Entry Continuing Care Reporting System (AD)
   - Used when a resident is readmitted following a previous discharge from the facility. Certain conditions must be met.
3. [MDS-17] Update Record Continuing Care Reporting System (UP)

- To be completed at any stage if changes or corrections to demographic information are required.

4. [MDS-05] Quarterly Assessment Continuing Care Reporting System (QA)
    - Used to track resident status between Full Assessments, and to facilitate monitoring of critical indicators relating to changes in the resident's status. The Quarterly Assessment must be completed within 92 days of the last Full or Quarterly Assessment. To be completed at any stage if changes or corrections to demographic information are required.
5. [MDS-01] Full Admission Assessment Continuing Care Reporting System (FA)
    - To be completed by the 14th calendar day of the resident's admission to the facility if this is the resident's first stay in the facility or if the resident returns to the facility after being discharged and the conditions for use of the Re-entry Form do not apply. The 1st calendar day of admission = 0, i.e. If patient was admitted on January 1st, then the full admit should be completed by January 15.
6. [MDS-02] Full Assessment Continuing Care Reporting System (FA)
    - To be completed within 366 days of the Assessment Reference Date (Element A3) from the last Full Assessment.
7. [MDS-03] Significant Change Assessment Continuing Care Reporting System (FA)
    - Required if there is a significant change in Resident's status. Complete a Full Assessment within 14 days of the day determination of a significant change has occurred.
8. [MDS-06] Discharge Return Not Anticipated Continuing Care Reporting System (DC)
    - Required whenever a resident dies or is discharged from the facility. This is the only record that must be completed at the time of any discharge or death. Complete the No Return (06) if no return to the facility is anticipated.
9. [MDS-07] Discharge Return Anticipated Continuing Care Reporting System (DC)
    - Complete the Return Anticipated (07) if a return to the facility is anticipated.
10. [MDS-08] Discharge Prior to Assessment Continuing Care Reporting System (DC)
    - Discharged prior to completing initial assessment.

Searching for a Clinical MDS Visit

- Click on any of the Assessments and press F4 to search for the record (Please see section 5.1 Searching for a Record).

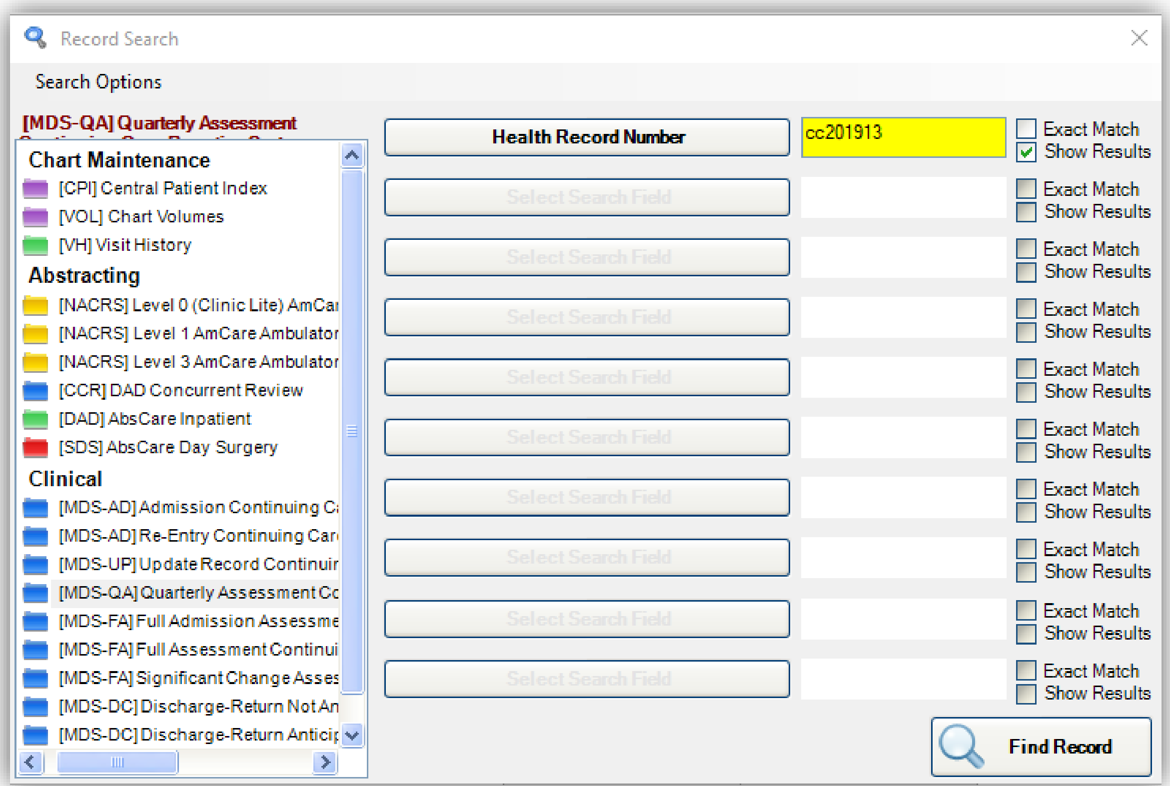
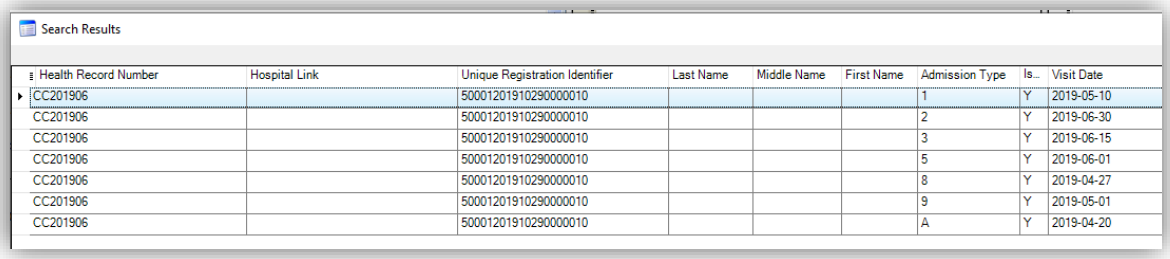


Figure 366 – Clinical MDS - Searching

- The ability to search on any field within that assessment. For example: if the [MDS-QA] Quarterly Assessment Continuing Care Reporting System is chosen, a search can be done on any of the fields in that assessment by clicking on the field name in the middle column. As well a search can be performed on more than one assessment. When the search results screen is displayed all assessments for that search option will display.

- When a search is made by Health Record Number or Patient Name all the assessments will display for that patient.



Search Results

Health Record Number	Hospital Link	Unique Registration Identifier	Last Name	Middle Name	First Name	Admission Type	Is...	Visit Date
CC201906		50001201910290000010				1	Y	2019-05-10
CC201906		50001201910290000010				2	Y	2019-06-30
CC201906		50001201910290000010				3	Y	2019-06-15
CC201906		50001201910290000010				5	Y	2019-06-01
CC201906		50001201910290000010				8	Y	2019-04-27
CC201906		50001201910290000010				9	Y	2019-05-01
CC201906		50001201910290000010				A	Y	2019-04-20

Figure 367 – Clinical MDS – Search Patient Display

- Double click on the assessment that needs to be accessed.
- When the assessment displays all fields previously inputted with display.
- To go to other assessments, click on the other assessments displayed in the Patient Visit History.

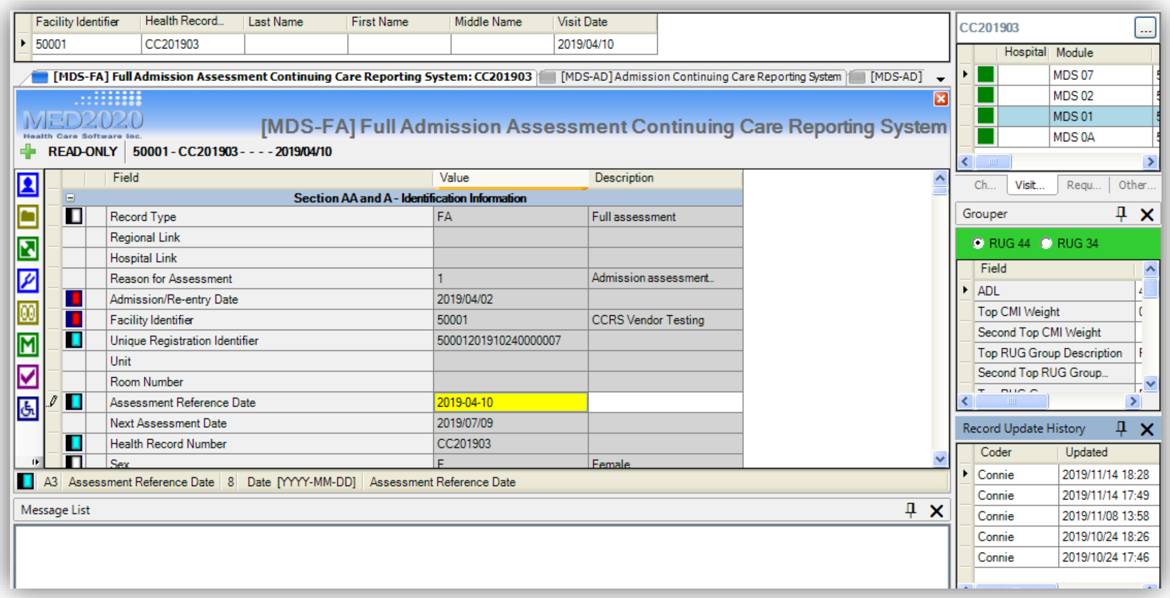


Figure 368 – Clinical MDS – Patient Assessment

Facilities that have a batch or HL7 (real-time) interface transferring records into the WinRecs program will use the F4 search function to locate the assessment records they need to complete.

Creating a New Assessment for a Clinical MDS Visit

- Click on the Assessment Type that needs to be created and press New [F5] (See 5.2 Creating a New Record)

A facility that does not have an interface to transfer the patient visit information into WinRecs ® will use the F5 (*new*) function to create a new assessment record.

Auto-Completion of Fields

Depending on the assessment section, some fields will auto-populate with values based on a key question. If 'Y' is typed in the '*None of the below'* fields, the remaining fields' values will grey out and default to No. This assists with the completion of assessment fields where the section does not apply to that patient yet must be completed based on data submission requirements. This requires less key stroking for data entry and consistency in the quality of data entered in the abstract.

An example from **Section C – Communication/Hearing Patterns**, a 'Y' was inputted into the field 'None of the below' and the fields below auto-completed and the fields greyed out. Leave the field 'None of the below' blank results in each of the fields needing to be populated.

		Section C - Communication/ Hearing Patterns		
		Hearing	0	Hears Adequately
		None of the below	Y	Yes
		Hearing aid, present and used regularly	0	No
		Hearing aid, present and not used regularly	0	No
		Other receptive communication techniques	0	No

Figure 369 – Clinical MDS – Auto-Completion of Fields

Copy Data from Latest Assessment

This feature allows the information from one assessment copy to another assessment, creating less keystrokes for data entry. The user would only need to go into the fields that have changed, not enter the whole assessment again. The following assessments will copy to each other:

- Full Admission Assessment to:
  - Quarterly Assessment
  - Full Assessment
- Full Assessment to:
  - Quarterly Assessment
  - Full Assessment
- Quarterly Assessment to:
  - Full Assessment
  - Quarterly Assessment

For this feature to work the following must be completed within the **Institution Profile** & **Control File**:

Institution Profile/Settings:

- The field named 'Copy Data from Latest Assessment' in the Institution Profile/Settings needs to be set to either:
  - Yes, for assessments created by user or interface
  - Yes, only for assessments created by user

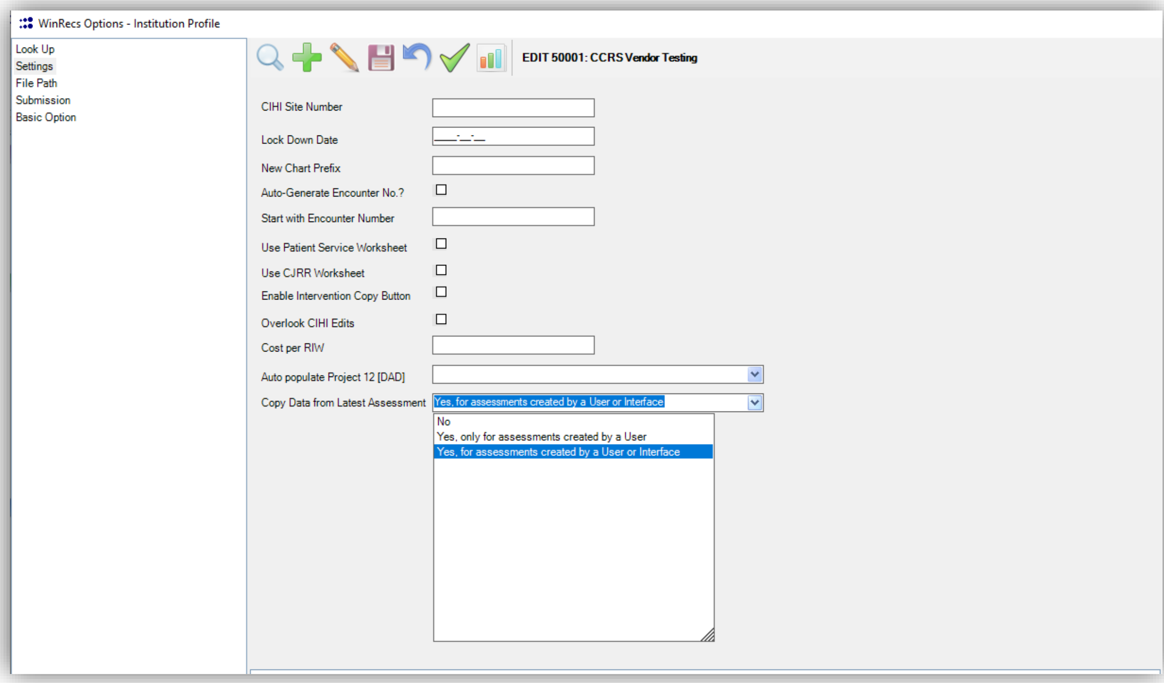
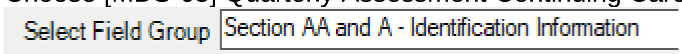


Figure 370 – Clinical MDS – Copy Data from latest assessment – Institution Profile

Control File:

1 – Choose [MDS-05] Quarterly Assessment Continuing Care Reporting System.

2 – 

3 – Choose ‘Facility Number’

4 – Under ‘Default’ enter Facility Number

Press  to save and Repeat for [MDS-01] Full Assessment Continuing Care Reporting System

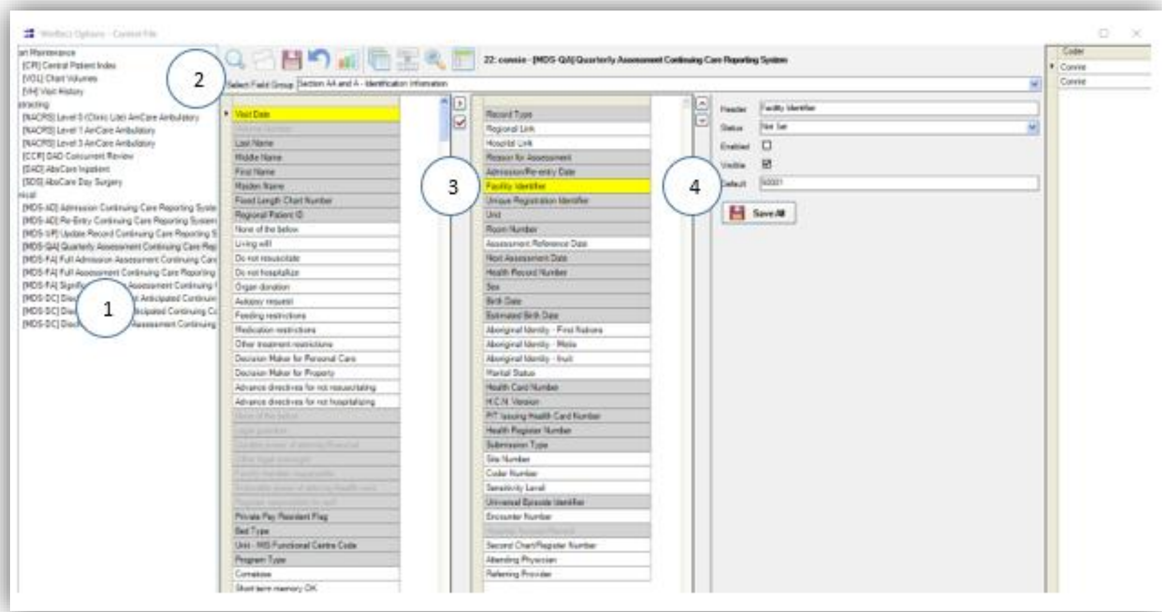
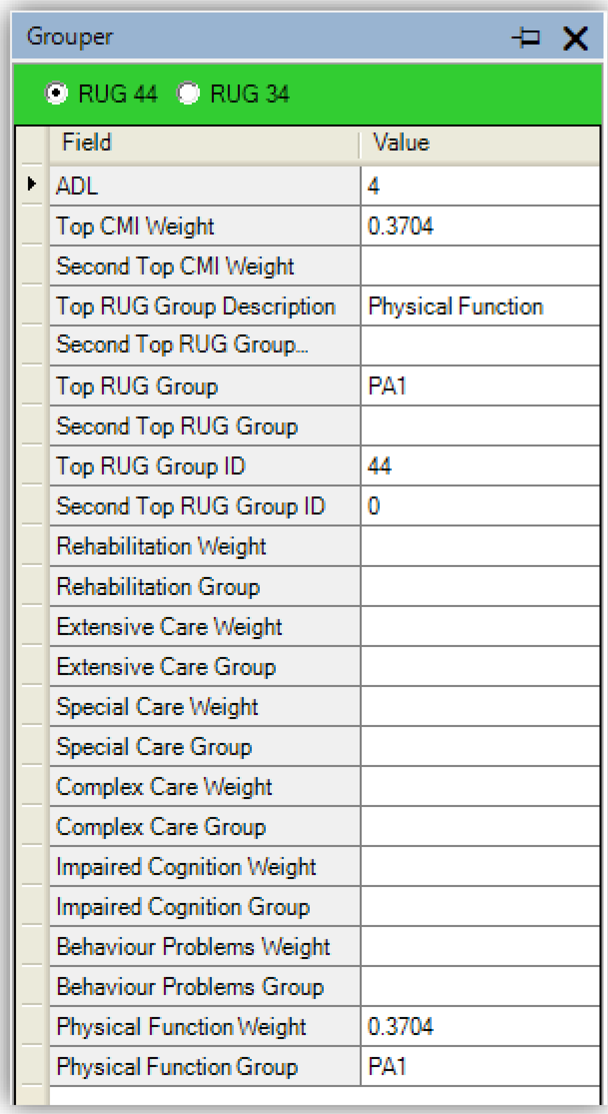


Figure 371 – Clinical MDS – Copy Data from Latest Assessment – Control File

RUGS Grouper


Grouper

RUG 44 RUG 34

Field	Value
ADL	4
Top CMI Weight	0.3704
Second Top CMI Weight	
Top RUG Group Description	Physical Function
Second Top RUG Group...	
Top RUG Group	PA1
Second Top RUG Group	
Top RUG Group ID	44
Second Top RUG Group ID	0
Rehabilitation Weight	
Rehabilitation Group	
Extensive Care Weight	
Extensive Care Group	
Special Care Weight	
Special Care Group	
Complex Care Weight	
Complex Care Group	
Impaired Cognition Weight	
Impaired Cognition Group	
Behaviour Problems Weight	
Behaviour Problems Group	
Physical Function Weight	0.3704
Physical Function Group	PA1

Figure 372 – Clinical MDS – RUGS Grouper

- **Rehabilitation -** Identifies Rehab RUG-III group the client has been assigned to. The table displays the RUG-III code and level as well as the Case Mix Index Value.
- **Extensive Care -** Identifies Rehab RUG-III group the client has been assigned to. The table displays the RUG-III code and level as well as the Case Mix Index Value.
- **Special Care -** Identifies Rehab RUG-III group the client has been assigned to. The table displays the RUG-III code and level as well as the Case Mix Index Value.
- **Complex Care -** Identifies the Clinically Complex Care RUG-III group the client has been assigned to. The table will display the RUG-III code and level as well as the Case Mix Index Value.

- **Impaired Cognition-**Identifies the Impaired Cognition RUG-III group the client has been assigned to. The table will display the RUG-III code and level as well as the Case Mix Index Value.
- **Behaviour Problems -**Identifies the Behaviour Problems RUG-III group the client has been assigned to. The table will display the RUG-III code and level as well as the Case Mix Index Value.
- **Physical Function-**Identifies the Reduced Physical Function RUG-III group the client has been assigned to. The table will display the RUG-III code and level as well as the Case Mix Index Value.

6.15 Clinical – NRS (National Rehabilitation Reporting System)

The Rehabilitation module is a diagnostic tool to keep track of individual patients and their progress once transferred to a specialized rehabilitation facility.

To open the Clinical Modules – [NRS}-XX National Rehabilitation Reporting System

- Select the menu option **Module → Clinical → [MDS]-XX National Rehabilitation Reporting System**

  — or —

- Select **WinRecs Module Menu → Clinical→ [MDS}-XX National Rehabilitation Reporting System**

The National Rehabilitation Reporting System modules has the following assessment types:

Figure 373 – Clinical NRS – Assessment Types

- NRS A – 1 - Admission National Rehabilitation Reporting System
- NRS D – 2 - Discharge National Rehabilitation Reporting System
- NRS F - 3 – Follow up National Rehabilitation Reporting System

- NRS I - IA – Interim National Rehabilitation Reporting System
- NRS P - PD – Post Discharge National Rehabilitation Reporting System

All the assessment types will display in the Patient Visit History and Rehabilitation Visit boxes except for the Interim Assessment and Post Discharge Assessment which will display only in the Assessment Links Tab. If the Assessment Links tab is not displayed go to View/Assessment Links.

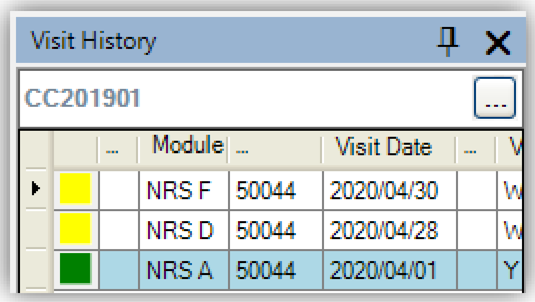


Figure 374 – Clinical NRS – Visit History

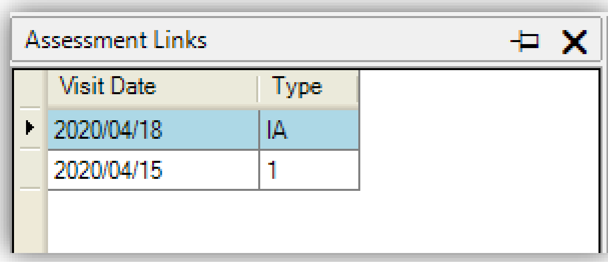


Figure 375 – Clinical NRS – Assessment Links

Searching for a Clinical NRS Visit

- Click on any of the Assessments and press F4 to search for the record (Please see section 5.1 Searching for a Record).

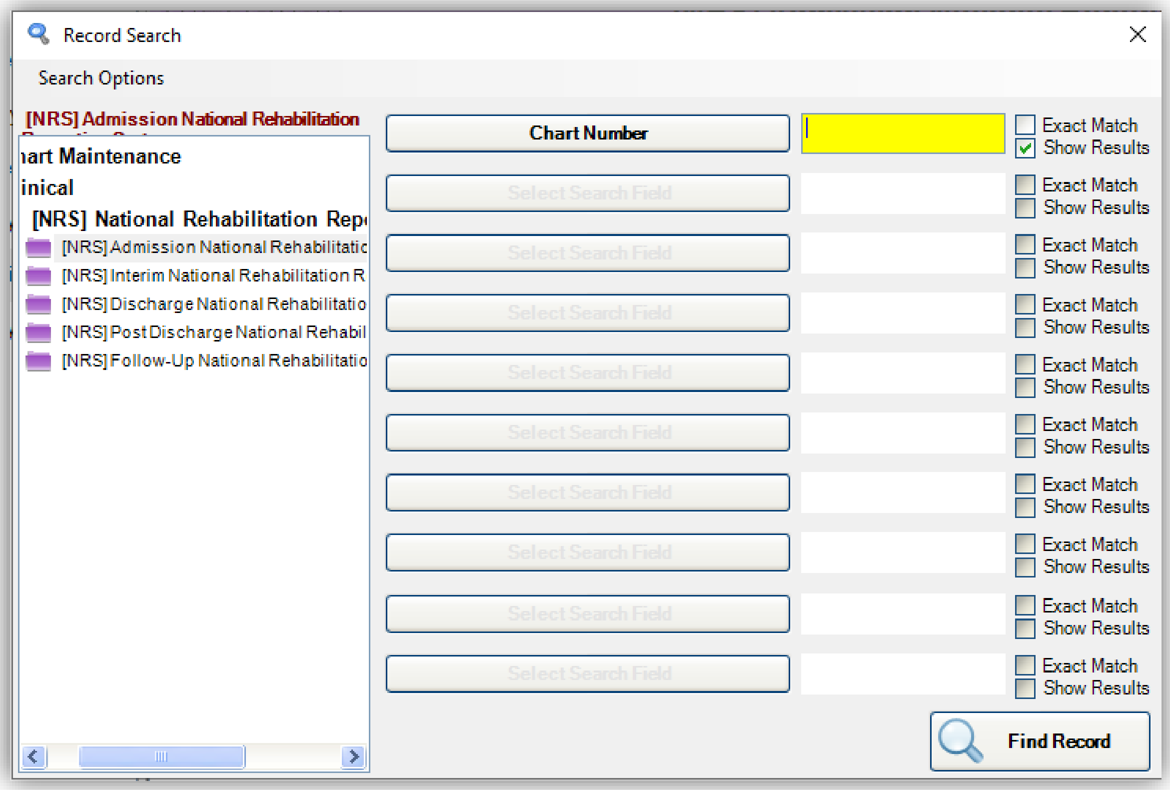
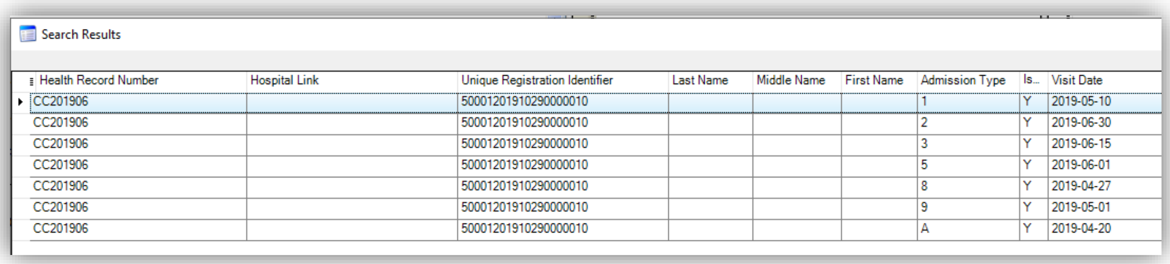


Figure 376 – Clinical NRS – Searching for an Assessment

- The ability to search on any field within that assessment. For example: if the [NRS] Discharge National Rehabilitation Reporting System is chosen, a search can be done on any of the fields in that assessment by clicking on the field name in the middle column. When the search results screen is displayed all assessments for that search option will display.
- When a search is made by Health Record Number or Patient Name all the assessments will display for that patient.


Search Results

Health Record Number	Hospital Link	Unique Registration Identifier	Last Name	Middle Name	First Name	Admission Type	Is...	Visit Date
CC201906		50001201910290000010				1	Y	2019-05-10
CC201906		50001201910290000010				2	Y	2019-06-30
CC201906		50001201910290000010				3	Y	2019-06-15
CC201906		50001201910290000010				5	Y	2019-06-01
CC201906		50001201910290000010				8	Y	2019-04-27
CC201906		50001201910290000010				9	Y	2019-05-01
CC201906		50001201910290000010				A	Y	2019-04-20

Figure 377 – Clinical NRS – Search Patient Display

- Double click on the assessment that needs to be accessed.
- When the assessment displays all fields previously inputted with display.
- To go to other assessments, click on the other assessments displayed in the Patient Visit History.

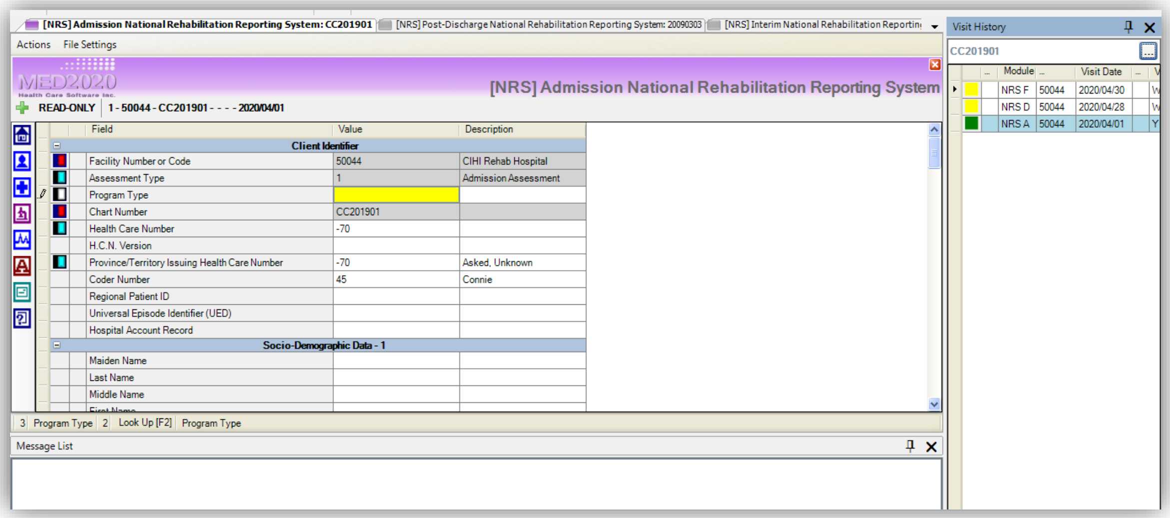


Figure 378 – Clinical NRS – Patient Assessment

Facilities that have a batch or HL7 (real-time) interface transferring records into the WinRecs program will use the F4 search function to locate the assessment records they need to complete.

Creating a New Assessment for a Clinical NRS Visit

- Click on the Assessment Type that needs to be created and press New [F5] (See 5.2 Creating a New Record)

A facility that does not have an interface to transfer the patient visit information into WinRecs ® will use the F5 (*new*) function to create a new assessment record.

- When creating a discharge assessment some assessment values (as per CIHI Guidelines) are carried over from the admission assessment. Several of these fields will be disabled (greyed out) with data in the fields. These fields contain data provided in the Admission Assessment can cannot be changed.
- An Admission Assessment must be completed before a Discharge Assessment. It is optional to record a Follow-Up Assessment once the Discharge Assessment has been completed.
- A Discharge Assessment must not be deleted without first deleting its associated Follow-Up Assessment (if applicable). Likewise, an Admission Assessment must not be deleted without deleting its associated Discharge Assessment.
- A Post Discharge Assessment can only be created if there is an existing Discharge Assessment. The Post Discharge Assessment is not submitted to CIHI .
- If an Admission Class field 4 (unplanned discharge without assessment) is used in the Admission Assessment the system will not allow you to create a Discharge Assessment.

Defaulting of Diagnosis Condition Type

The Main Health Condition type (occurrence 1) currently defaults to M. Diagnosis condition types for pre-admit and post-admit conditions will now default as follows:

- Admission Assessments - For any diagnosis occurrence greater than 1, the diagnosis condition type will always default to 1 (to represent Pre-admit Health Conditions).
- Discharge Assessments - For any diagnosis occurrence greater than 1, the diagnosis condition type will always default to 2 (to represent Post-Admit Health Conditions).

Note that Transfer or Death Health Conditions (diagnosis condition type of W) will still need to be manually assigned.

FIM – Functional Independence Measure

Functional Independence Measure is the sum of all scores/values entered on fields 41 – 58 which denotes a GREEN COLOUR Icon in the Field Requirements Bar. They can be found under the section Activities and Participation. The FIM instrument includes the following data elements:

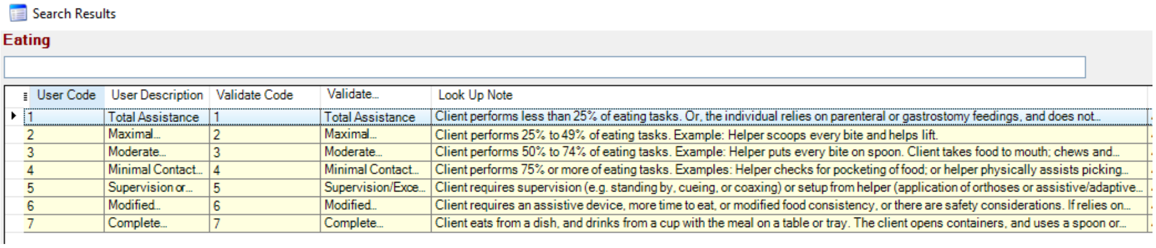
41. Eating
42. Grooming
43. Bathing
44. Dressing – Upper Body
45. Dressing – Lower Body
46. Toileting
47. Bladder Management
48. Bowel Management
49. Transfers: bed, chair, wheelchair
50. Transfers: toilet
51. Transfers: tub or shower
52. Locomotion: walk/wheelchair
53. Locomotion: stairs
54. Comprehension
55. Expression
56. Social Interaction
57. Problem Solving
58. Memory

FIM calculates as each field is entered. FIM values are not carried over to the Discharge Assessment.

Activities and Participation		
Eating	5	Supervision or Setup
Grooming	5	Supervision or Setup
Bathing	5	Supervision or Setup
Dressing-Upper Body	5	Supervision or Setup
Dressing-Lower Body	5	Supervision or Setup
Toileting	5	Supervision or Setup
Bladder Management	1	Total Assistance
Bowel Management	1	Total Assistance
Transfers: Bed, Chair, Wheelchair	1	Total Assistance
Transfers: Toilet	1	Total Assistance
Transfers: Tub or Shower	2	Maximal Assistance
Locomotion: Walk/Wheelchair	3	Moderate Assistance
Locomotion: Walk/Wheelchair-Mode	3	Both
Locomotion: Stairs	4	Minimal Contact Assistance
Comprehension	4	Minimal Prompting
Comprehension-Mode	1	Auditory
Expression	3	Moderate Prompting
Expression-Mode	3	Both
Social Interaction	3	Moderate Direction
Problem-Solving	3	Moderate Direction
Memory	5	Supervision

Figure 379 – Clinical NRS – FIM Values

On the Assessment grid, once a FIM field is highlighted, press the F2 function key or double-click. The usual look-up table will then display. The relevant information for that value displays in the Look Up Notes field.


Search Results

Eating

User Code	User Description	Validate Code	Validate...	Look Up Note
1	Total Assistance	1	Total Assistance	Client performs less than 25% of eating tasks. Or, the individual relies on parenteral or gastrostomy feedings, and does not...
2	Maximal...	2	Maximal...	Client performs 25% to 49% of eating tasks. Example: Helper scoops every bite and helps lift.
3	Moderate...	3	Moderate...	Client performs 50% to 74% of eating tasks. Example: Helper puts every bite on spoon. Client takes food to mouth; chews and...
4	Minimal Contact...	4	Minimal Contact...	Client performs 75% or more of eating tasks. Examples: Helper checks for pocketing of food; or helper physically assists picking...
5	Supervision or...	5	Supervision/Exce...	Client requires supervision (e.g. standing by, cueing, or coaxing) or setup from helper (application of orthoses or assistive/adaptive...
6	Modified...	6	Modified...	Client requires an assistive device, more time to eat, or modified food consistency, or there are safety considerations. If relies on...
7	Complete...	7	Complete...	Client eats from a dish, and drinks from a cup with the meal on a table or tray. The client opens containers, and uses a spoon or...

Figure 380 – Clinical NRS – FIM

Record Validation and Submission Date

- CIHI mandates that as of their annually-specified date, any assessments not already submitted that fall into the previous fiscal year, MUST be submitted under the new fiscal year edits/requirements.
- To accommodate this requirement, WinRecs has a setting in the Rehab institution profile where this annual date is entered. This field is the “Record Validation and Submission Date.” (Please see the section on NRS Submissions for more information).
- When an assessment is being completed in WinRecs, if it belongs to the previous fiscal year’s data, and the current system date is AFTER the Record Validation and Submission Date, the most current fiscal year edits/requirements will be applied to the assessment.
- This may result in some unexpected error messages appearing at the bottom of the screen – but these will be relevant to the current fiscal year’s edit requirements and must be completed correctly.

NRS RPG Grouper

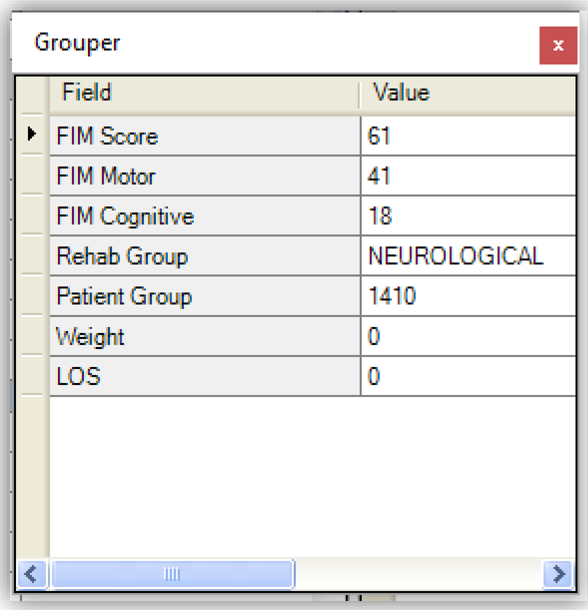
- To provide an integrated grouper and weighting methodology for adult inpatient rehabilitation care within the MED2020 National Rehabilitation Reporting System (NRS) module.
- The embedded grouper and weighting methodology will allow MED2020 Clients to account for adult rehabilitation care data into their funding formula which is then reported to Canadian Institute for Health Information (CIHI) and eventually their Provincial counterparts. Of note, currently, Ontario is the sole province where adult rehabilitation reporting is mandated. Data calculated by the rehabilitation grouper will be stored within the WinRecs database, allowing users to report on the data by use of accompanying pre-designed reports or ad-hoc reports created by the user facility by means of Crystal Reports™.
- The Rehabilitation Cost Weight (RCW) represents an average relative resource use for patients in an RPG. The data used to develop cost weights for the RPG was drawn from two sources of Ontario data: the National Rehabilitation System (NRS) and the Ontario Cost Distribution Methodology (OCDM).

- At discharge, each patient episode is assigned an RCW. The RCW depends on the assigned RPG and the length of stay (LOS) of the episode of care.

Using the NRS RPG Grouper

Once the facility has purchased the NRS Grouper and the WinRecs Update has been applied to their WinRecs database, any user with permissions to the NRS Module will be able to view the NRS Grouper information in the FIM/RPG grid of admission and/or discharge assessments.

- When the Admission assessment has had adequate data entered to complete the calculation, the grouper data will display in the relevant cells in the FIM table.
- Initial values are displayed at completion of the Admission Assessment however the full calculation is applied to the FIM grid once the Discharge Assessment has been completed.



Field	Value
FIM Score	61
FIM Motor	41
FIM Cognitive	18
Rehab Group	NEUROLOGICAL
Patient Group	1410
Weight	0
LOS	0

Figure 381 – Clinical NRS – RPG Grouper

Batch Grouper

Batch Grouping Batch Grouping of NRS RPG data is available using the Batch Grouping functionality in the Utilities menu. Please see Using the Batch Grouper section in this User Guide for detailed information on the steps required.

6.16 Clinical – OMHRS (Ontario Mental Health Reporting System)

The Ontario Mental Health Reporting System (OMHRS) serves to standardize the capture of mental health clinical and administrative information.

To open the Clinical Modules – [OMHRS}-XX Ontario Mental Health Registry System

- Select the menu option **Module → Clinical → [MHRS]Mental Health Registry System**

  — or —

- Select **WinRecs Module Menu → Clinical→ [MHRS]Mental Health Registry System**

The Ontario Mental Health Registry System module has the following assessment types:

Figure 382 – OMHRS – Assessment Types

Assessment Types

- MHRS- FA – Record Type 3 - Full Admission Assessment
- MHRS-SS – Record Type 7 – Short Stay Assessment
- MHRS-CS – Record Type 6 – Change in Status Assessment
- MHRS-QA – Record Type 4 – Quarterly Assessment
- MHRS – DA – Record Type 5 – Discharge Assessment

All the assessment types will display in the Patient Visit History.

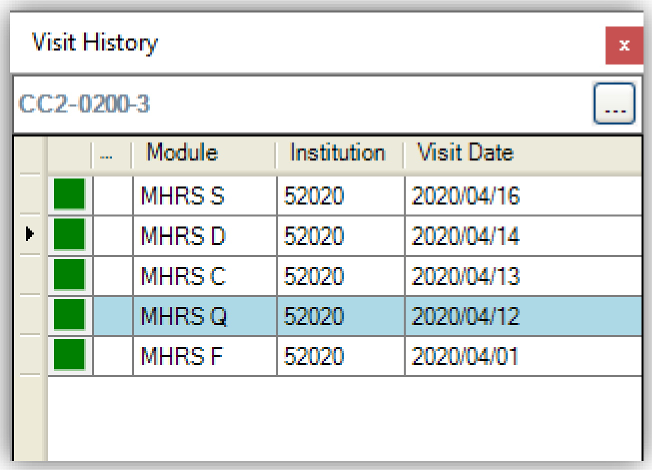


Figure 383 – Clinical OMHRS – Patient History Assessment Types

Searching for a Clinical OMHRS Visit

- Click on any of the Assessments and press F4 to search for the record (Please see section 5.1 Searching for a Record).
- The ability to search on any field within that assessment. For example: if the [MHRS] Discharge National Rehabilitation Reporting System is chosen, a search can be done on any of the fields in that assessment by clicking on the field name in the middle column. When the search results screen is displayed all assessments for that search option will display.
- When a search is made by Health Record Number or Patient Name all the assessments will display for that patient.

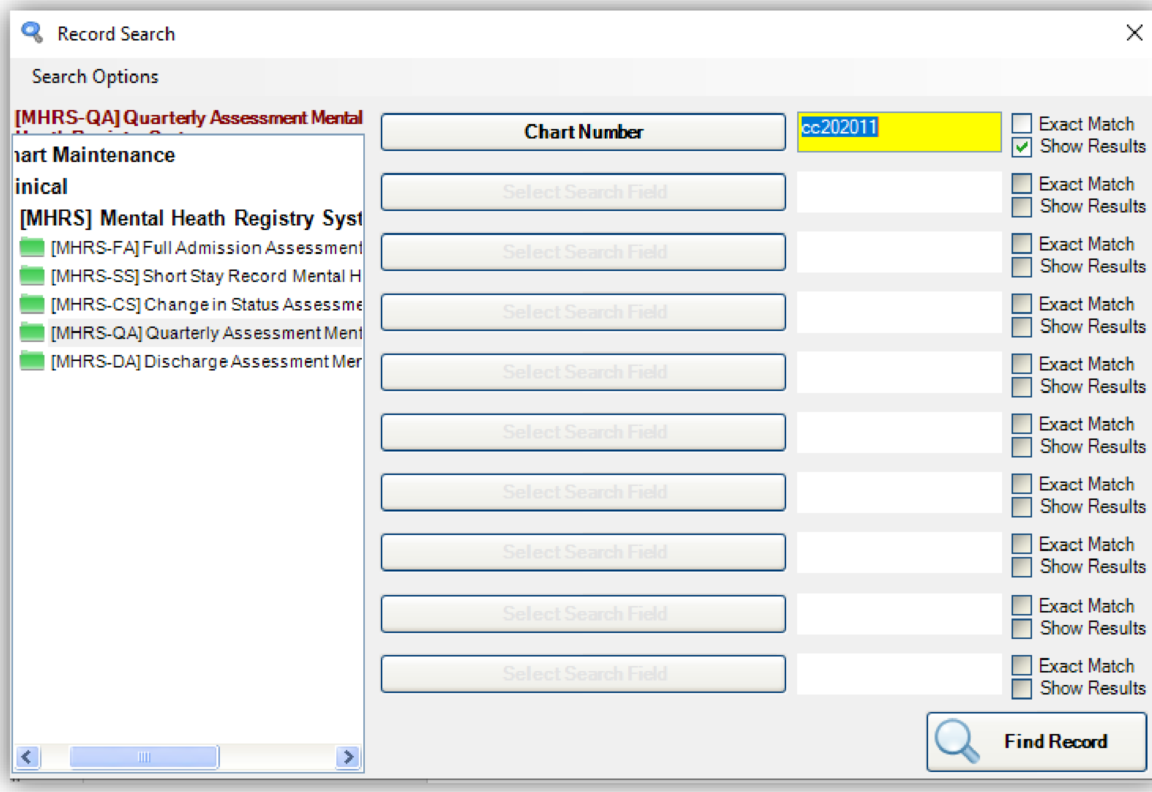


Figure 384 – Clinical OMHRS – Record Search

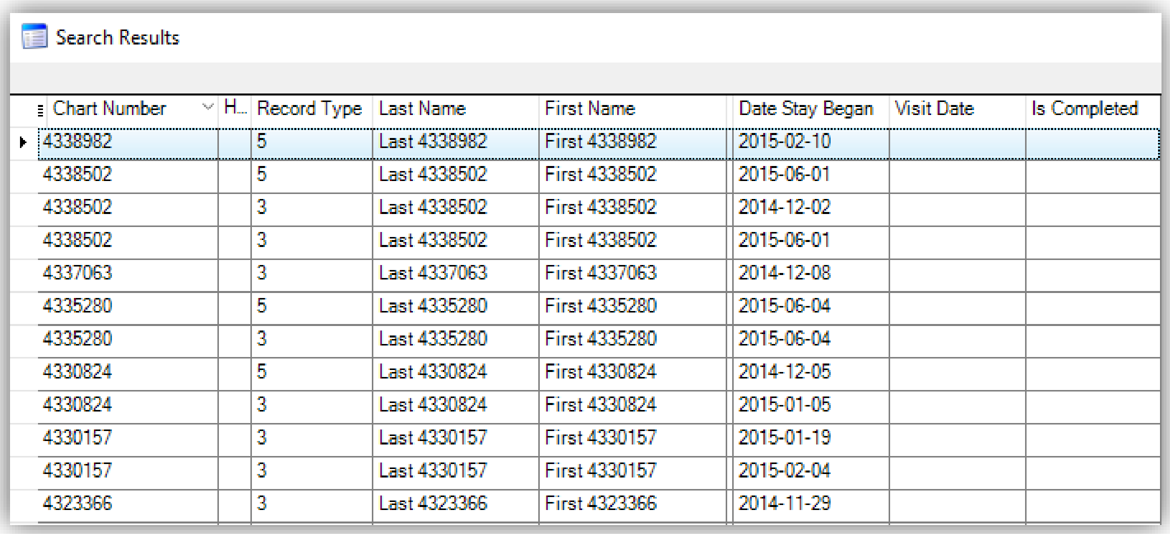

Search Results

Chart Number	H...	Record Type	Last Name	First Name	Date Stay Began	Visit Date	Is Completed
4338982		5	Last 4338982	First 4338982	2015-02-10		
4338502		5	Last 4338502	First 4338502	2015-06-01		
4338502		3	Last 4338502	First 4338502	2014-12-02		
4338502		3	Last 4338502	First 4338502	2015-06-01		
4337063		3	Last 4337063	First 4337063	2014-12-08		
4335280		5	Last 4335280	First 4335280	2015-06-04		
4335280		3	Last 4335280	First 4335280	2015-06-04		
4330824		5	Last 4330824	First 4330824	2014-12-05		
4330824		3	Last 4330824	First 4330824	2015-01-05		
4330157		3	Last 4330157	First 4330157	2015-01-19		
4330157		3	Last 4330157	First 4330157	2015-02-04		
4323366		3	Last 4323366	First 4323366	2014-11-29		

Figure 385 – Clinical OMHRS – Search Patient Display

- Double click on the assessment that needs to be accessed.
- When the assessment displays all fields previously inputted will display.
- To go to other assessments, click on the other assessments displayed in the Patient Visit History.

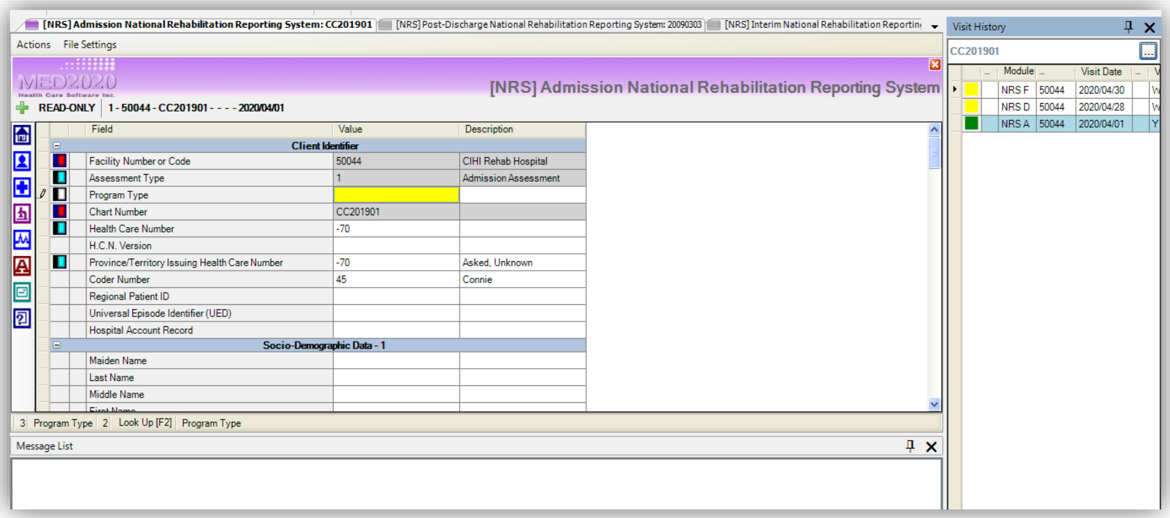


Figure 386 – Clinical NRS – Patient Assessment

Facilities that have a batch or HL7 (real-time) interface transferring records into the WinRecs program will use the F4 search function to locate the assessment records they need to complete.

Creating a New Assessment for a Clinical OMHRS Visit

There will be 2 occasions when an assessment will need to be manually created within WinRecs. One is the Quarterly assessment, the other is the Change in Status assessment. Both assessments are created the same way and follow the same steps.

- A Quarterly assessment is required when a patient has stayed more than 92 days since the last assessment was done.
- A Change In Status assessment is required when “a patient has had a major physical, mental, or social change/event that would render the current assessment and care plan invalid” (CIHI 2006).
- Click on the Assessment Type that needs to be created and press New [F5] (See 5.2 Creating a New Record)

A facility that does not have an interface to transfer the patient visit information into WinRecs ® will use the F5 (*new*) function to create a new assessment record.

SCIPP Grouper (System for the Classification of In-Patient Psychiatry

The System for the Classification of In-Patient Psychiatry grouper is available to clients to purchase in addition to the OHMRS module. The SCIPP grouper data can be found in the right-hand display panel of the OMHRS module, if you are unable to see the Grouper Calculator, go to View/Grouper Calculator. An associated "auto-calculate SCIPP Grouper" option has been added to the User Profile. SCIPP Grouper pre-designed reports have been made available.

The SCIPP Grouper is only available to clients who have purchased this functionality in addition to the OHMRS module.

Batch Grouper

Batch Grouping Batch Grouping of SCIPP data is available using the Batch Grouping functionality in the Utilities menu. Please see Using the Batch Grouper section in this User Guide for detailed information on the steps required.

7. WinRecs Regional Solution

A Regional Solution is defined as a WinRecs implementation for a group of health regions, hospitals or sites using one single WinRecs installation. In this environment, each hospital can store and work with patient data independently from other sites in the regional solution. Regional users can be defined for situations where a user, regardless of physical location requires access to records belonging to a different site.

The Regional Solutions is determined by the one icon:

- Profile Links

Figure 387 – Regional Solution – Profile Links Icon

- Clicking on Profile Links will open the following window:

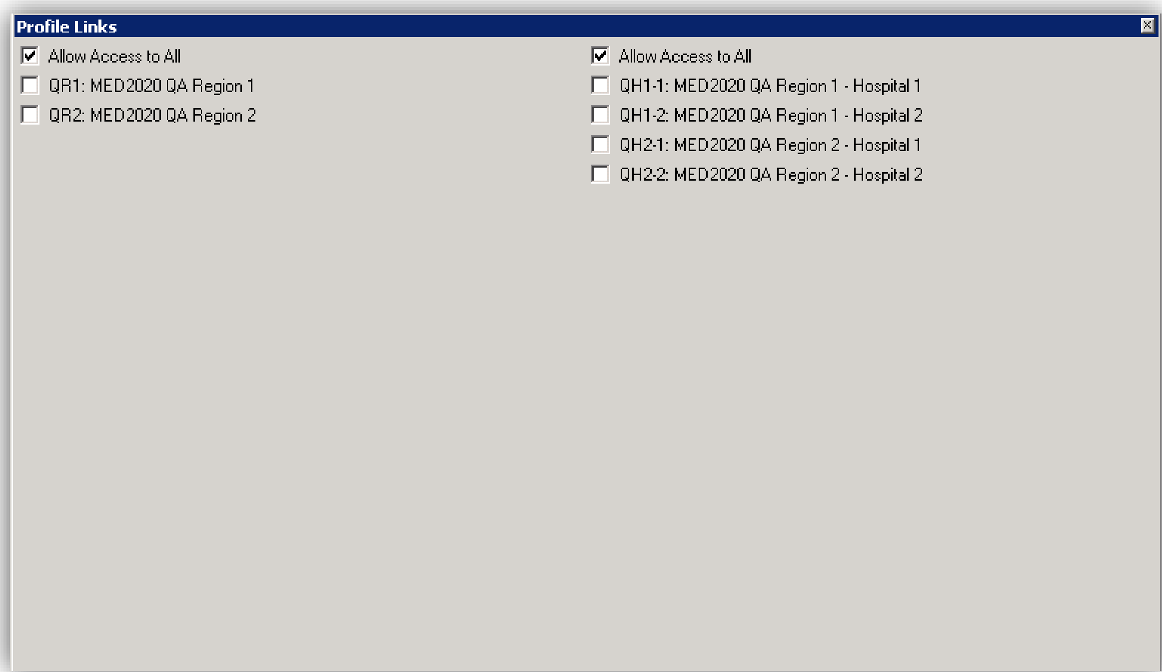


Figure 388 – Regional Solution – Profile Links Screen

- The left hand side lists all the Regions and the Right Hand Side lists all the Hospitals.
- For each module that has the Profile Links, able to assign a user, field, project etc. to a specified region(s) or hospital(s)

8. Glossary

Abstracting

Procedure whereby a coder captures electronically, with WinRecs, records of a single in-patient or out-patient episode (visit event) that is usually sent to CIHI and the appropriate provincial ministry of health, after the patient is discharged.

CCR (Concurrent Review)

The process of starting to abstract prior to patient discharge.

Submission

The process of submitting abstracted information to CIHI.

CCI

Canadian Classification of Health Interventions.

CIHI

Canadian Institute for Health Information, the organization that defines and manages healthcare information in Canada.

DAD

Discharge Abstract Database

ICD-10-CA

International Statistical Classification of Diseases and Related Health Problems Tenth Revision, Canada.

NACRS

National Ambulatory Care Reporting System

Occurrence

Certain data elements can occur multiple times per visit. These are tracked as occurrences. A patient may have multiple diagnoses and interventions during a hospital visit. Occurrences are handled in WinRecs using multi-forms.

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