Edits Management Tool (EMT) Training Manual for Winrecs 3.0

MED2020 Health Care Software Inc.

MED2020 Health Software Inc. (MED2020) is the leading provider of modular health information management solutions for the Canadian health care industry and is headquartered in Ottawa, Ontario. Solutions are offered to assist in capturing, reporting and analyzing health data to support 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 that have also been designed to assist health information management departments with their operational needs.

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Purpose

A module for the end user to create in house edits so that a message will generate at the time of entering the record. The purpose of this module is to alert the user when data entered in the record does not meet hospital defined standards.

- These standards could be Hospital, Ministry or third party driven. These edits would also ensure Health Information standards within the department are being met.

Goal

- To promote Data Quality
- To ensure users are entering record consistently
- To flag the user when data elements are not captured or when a combination of values captured are not meeting hospital specifications
- The hospital standards would also ensure information is being captured for Reporting purposes.

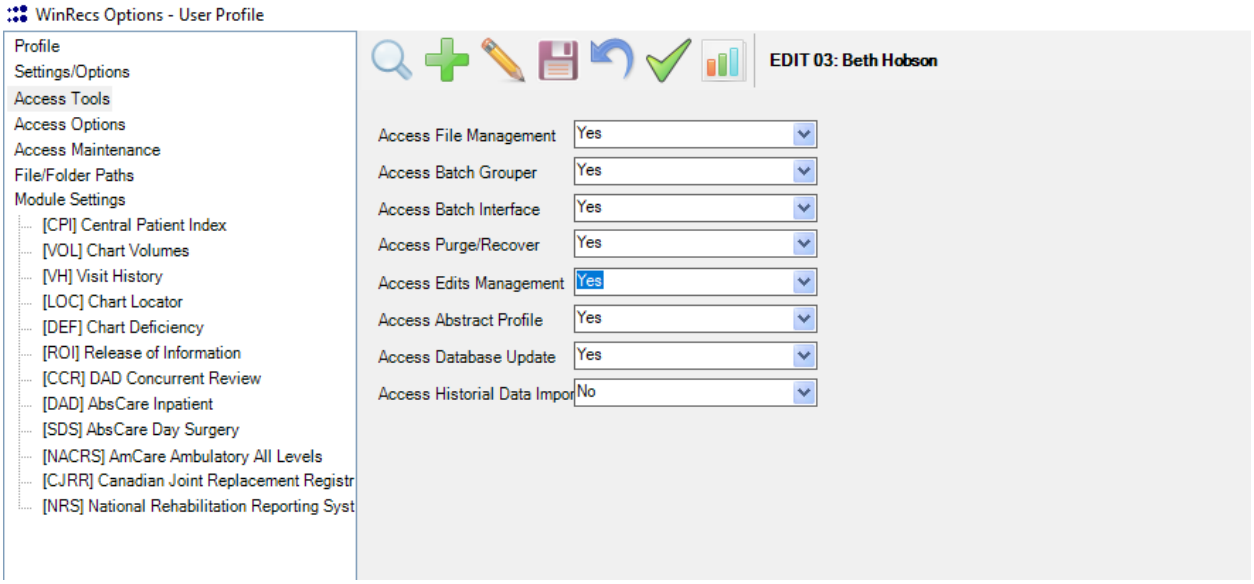
Challenges

- Valuable time is spent generating reports at the end of the month, quarter and distributing the lists to the coders
- Valuable time spent by the abstractor to familiarize themselves with the visit when correcting the information
- In Winrecs 2.0 in order to generate a message in the abstract or a list at the end of the day, month quarter, user must have Intermediate Level knowledge of Crystal Reports and the use of formula language
- People who need edits at abstracting level are usually users NOT Report Writers
- Must have a Crystal License and installed to create edits
- Edit report runs at the end of the abstract every time the user saves even when the abstract is clean

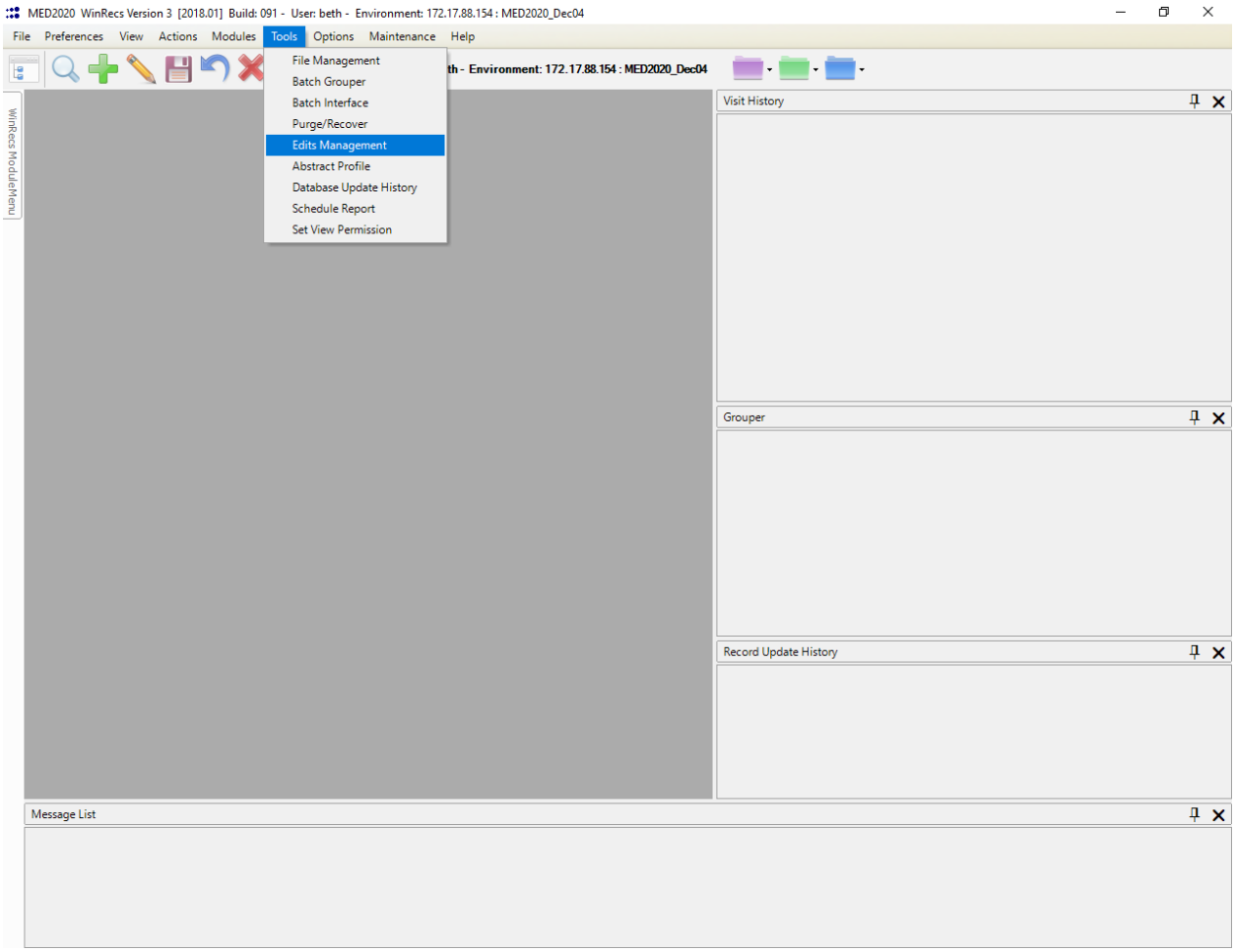
User Profile

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 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.

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

Examples:

- Operators used in Field Conditions

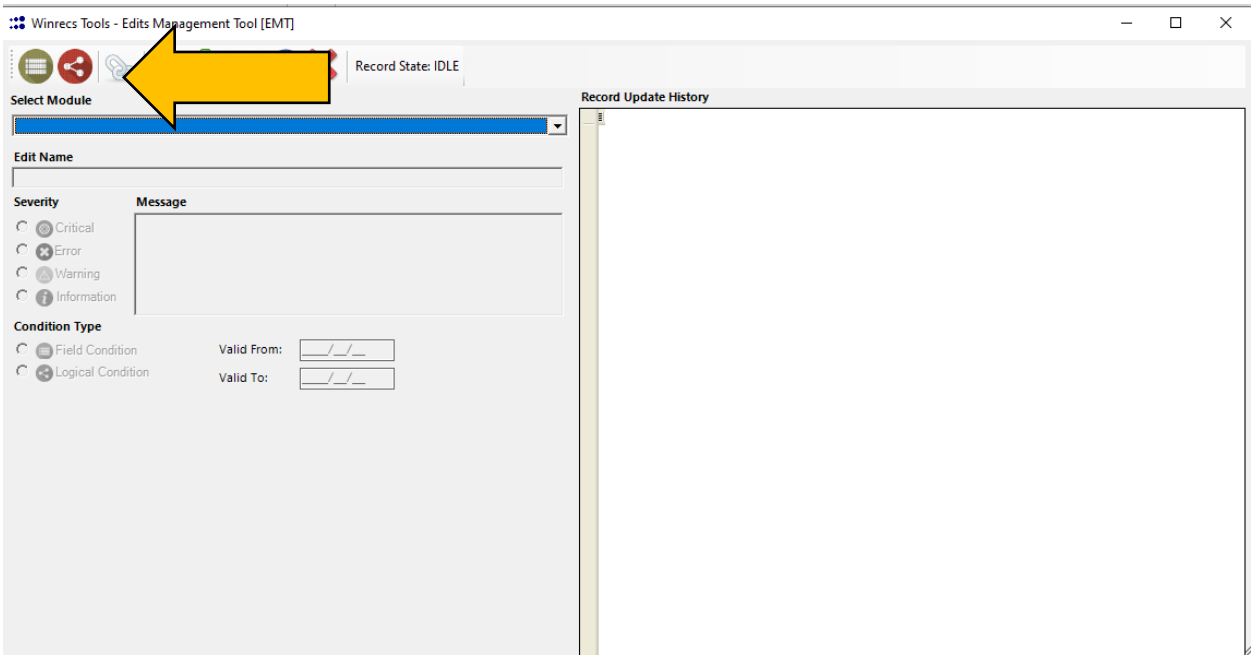
{Admit Category}= “E”
{Diagnosis Code} like “K29*”
{Institution Number} in [“50003”,”51003”,”52003”]
{Triage Level} <> “1”

- Operators used in Logical Conditions

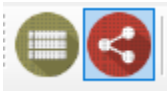
{Triage Level} <> “1” **and** {Disposition Code in [“10”, “11”]
{Admit Category} = “E” **and** {Entry Code} <> “E”

({Admit Category}=”E” and {Entry Code} <> “E”) **or**
{Dispostion Code}=”05”

Condition Editors

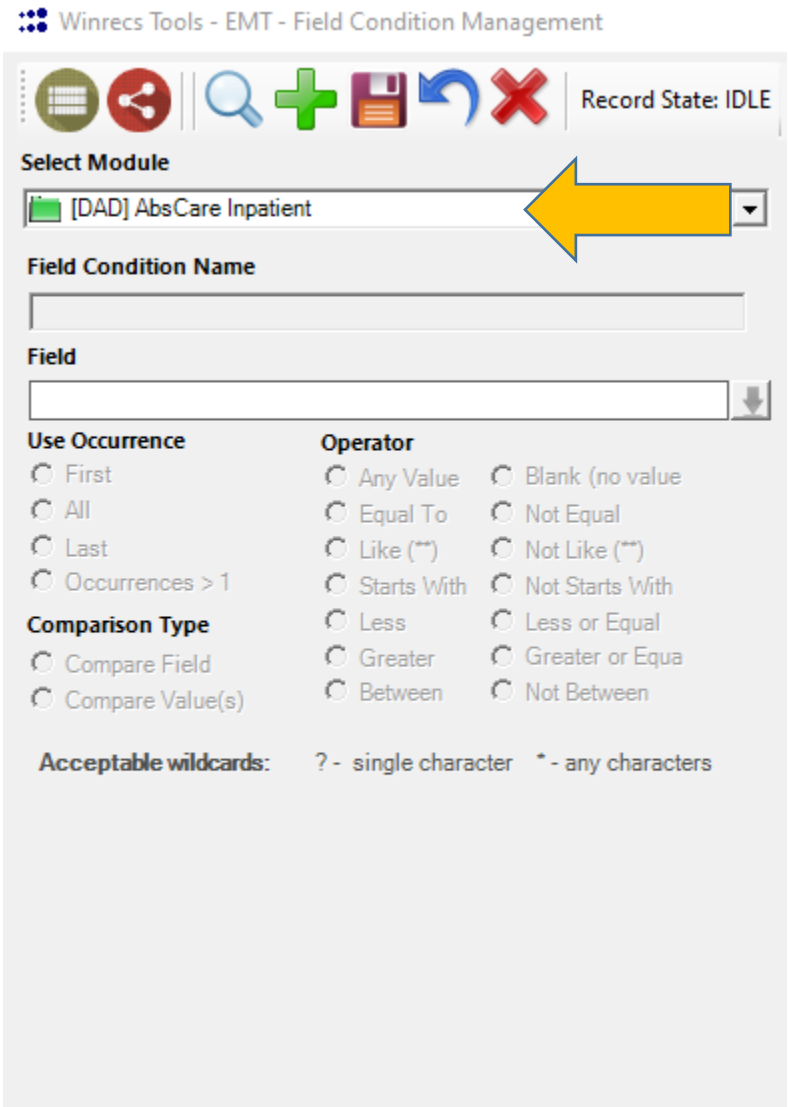


Two icons in tool bar



Field Condition Editor

Select Module in drop down



New Condition

Field Condition Name

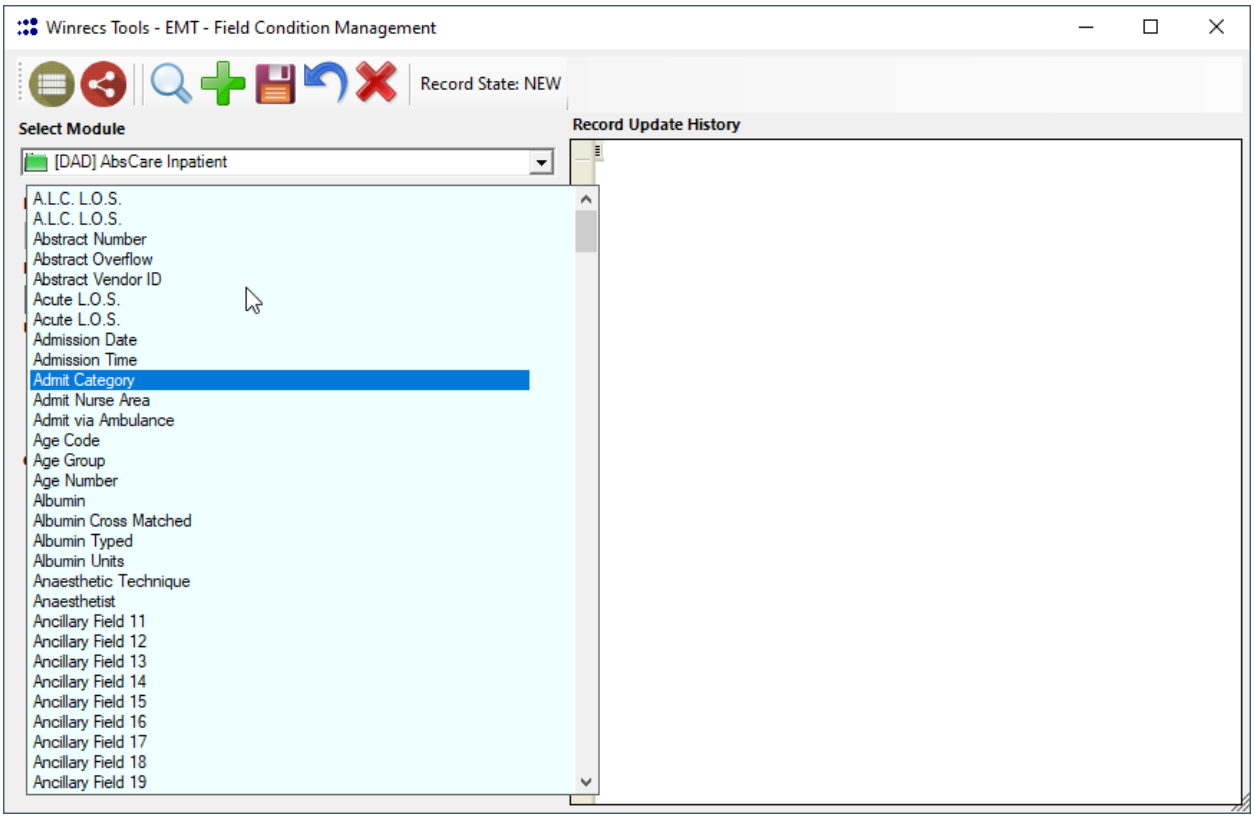
Name the Field Condition you are creating.

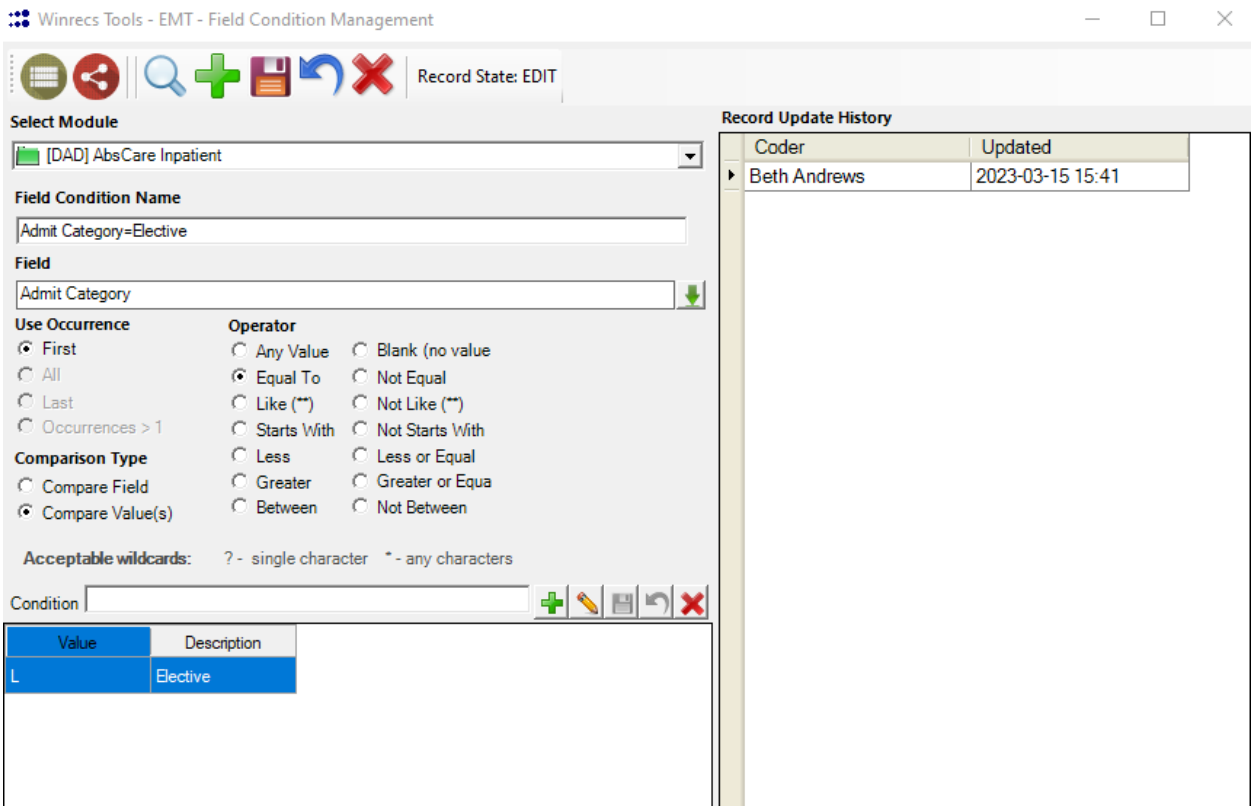
Suggestion: For your Field Conditions, establish a naming convention . If the field condition is referring to Diagnosis, name the Field Condition Diag, Dx, Intervention, Intv l The list of conditions will sort in alphabetical order based on the name.

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

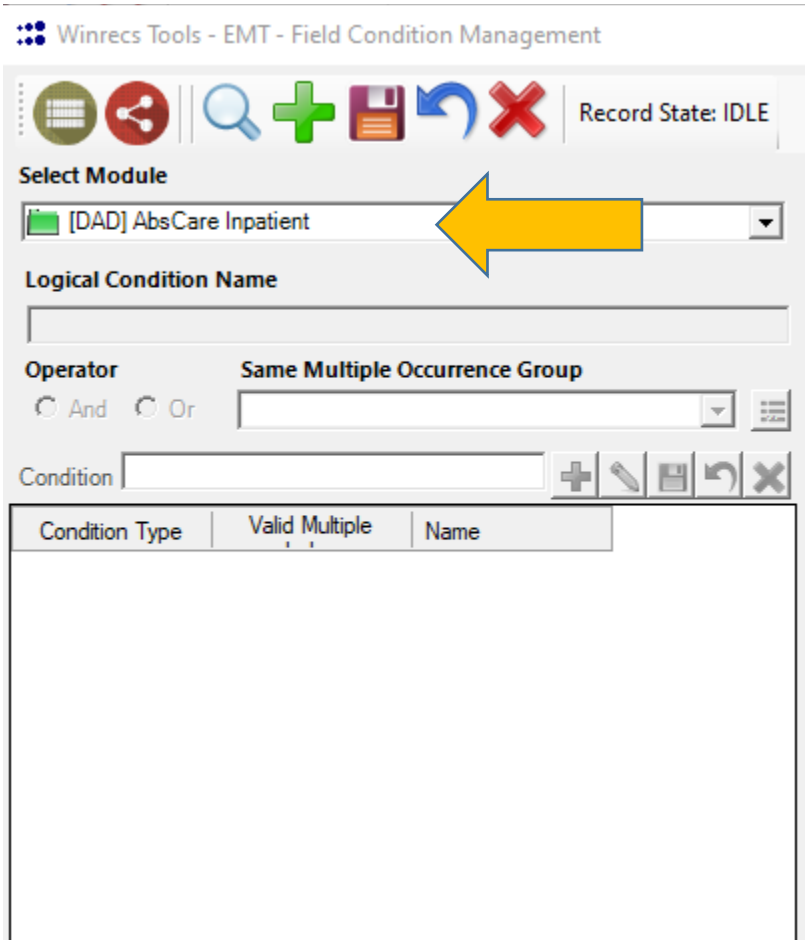
Comparison type

- *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

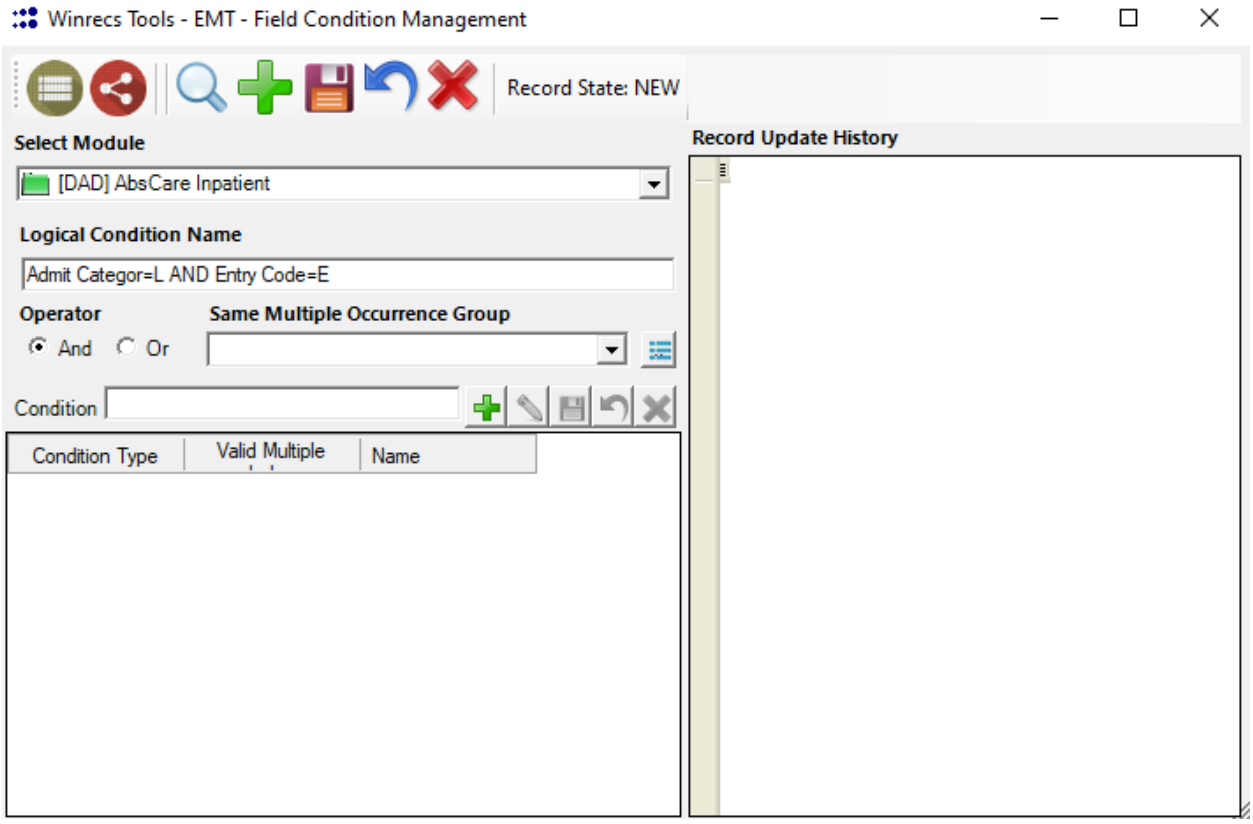
- Name the Logical Condition you are creating.

Logical condition operators

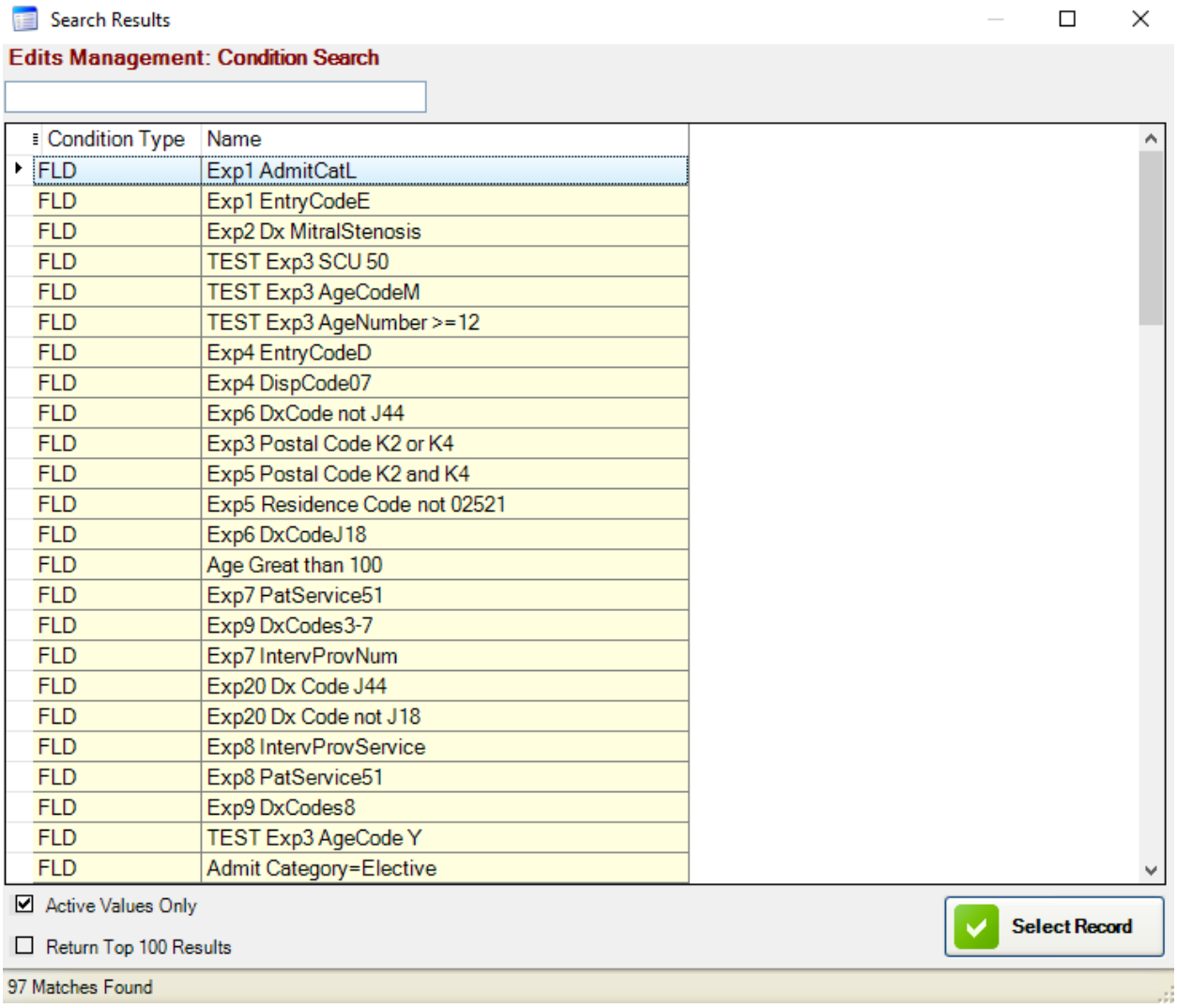
FIELD condition **AND** FIELD condition
LOGICAL condition **AND** FIELD condition
LOGICAL condition **And** FIELD condition **OR** FIELD condition

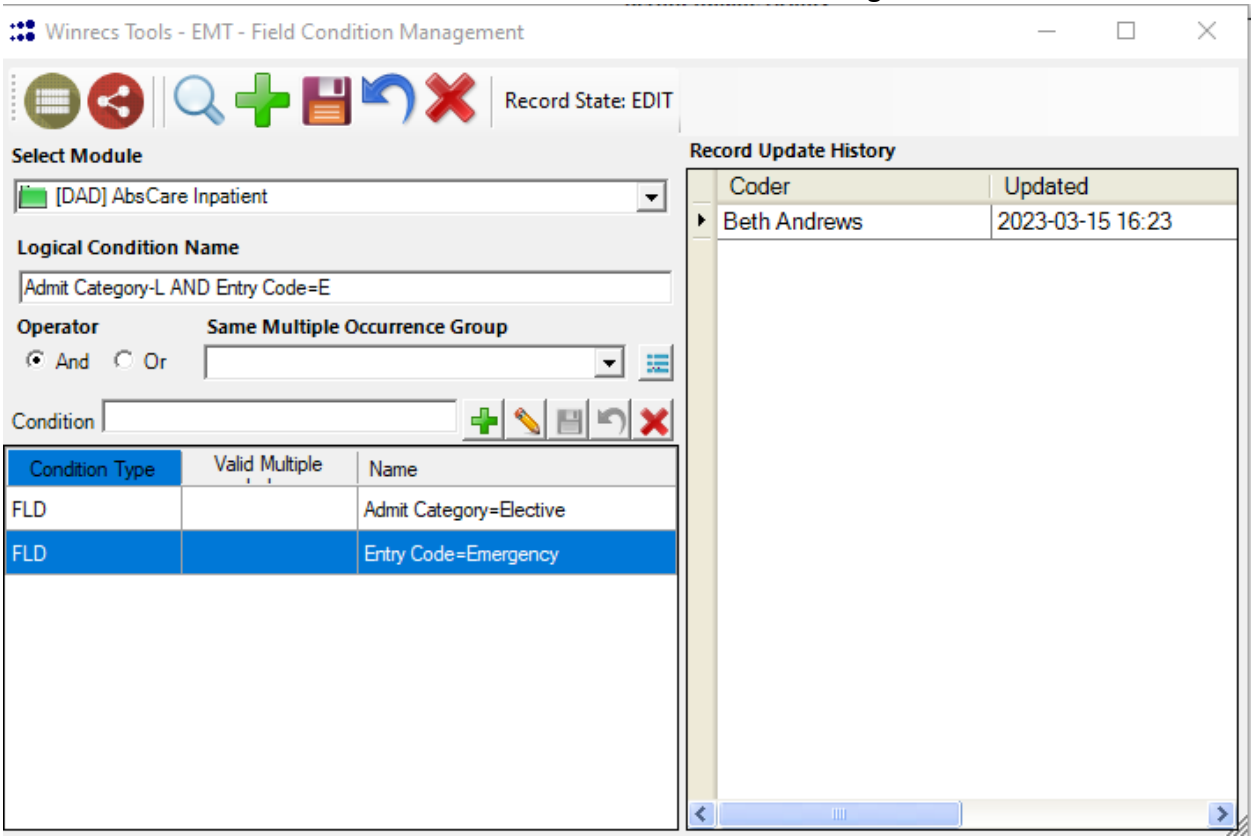
LOGICAL condition **AND** LOGICAL condition
LOGICAL condition **OR** LOGICAL condition

- *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

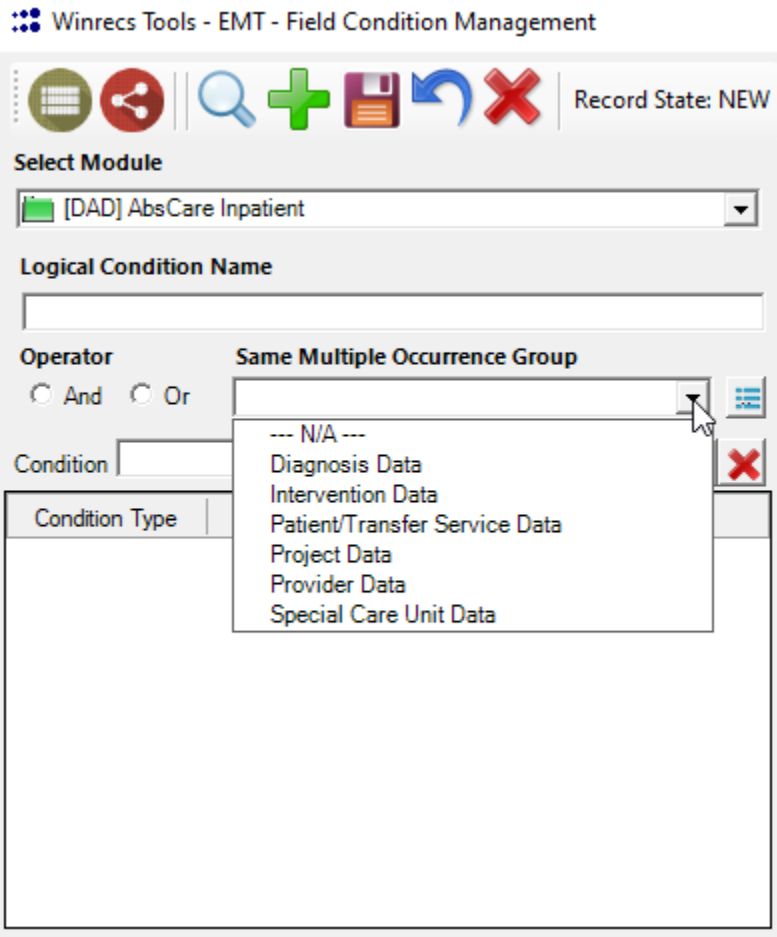


Save F7

Same Occurrence (Multiforms)

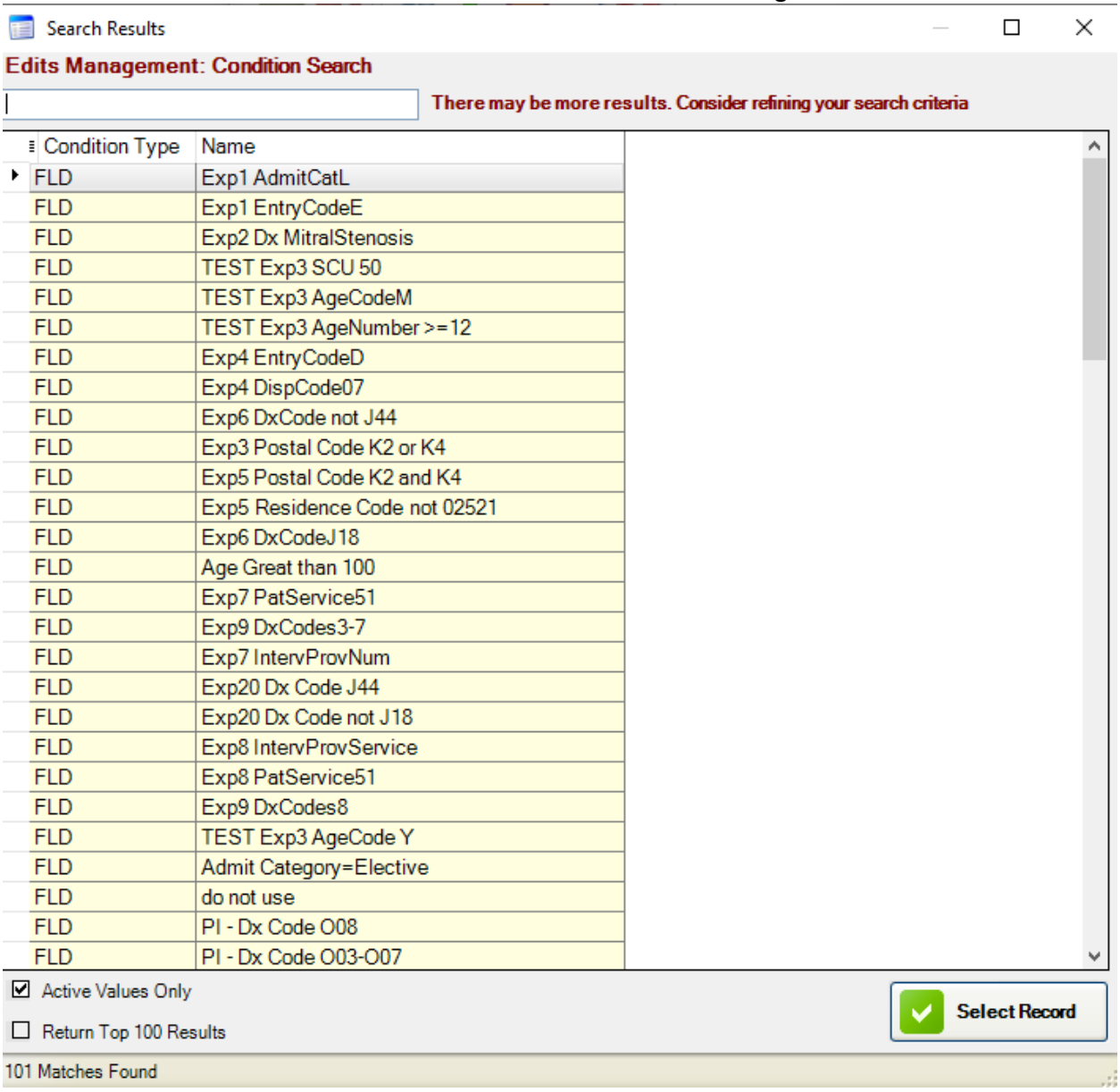
When combining two or more conditions (Field and/or Logical Condition) together, it is possible to create a Logical Condition that refers to fields in a multiform. The edit may refer to fields from the SAME Occurrence.

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

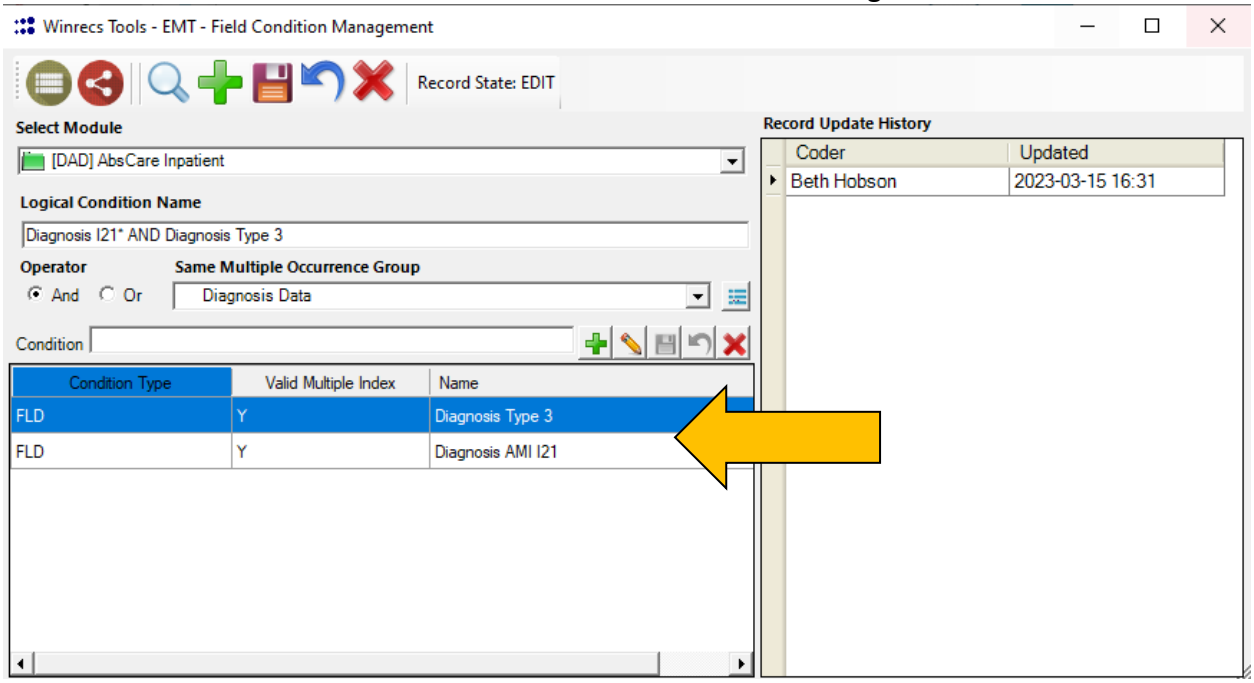


To select a conditions click the to enable the Condition field.

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.

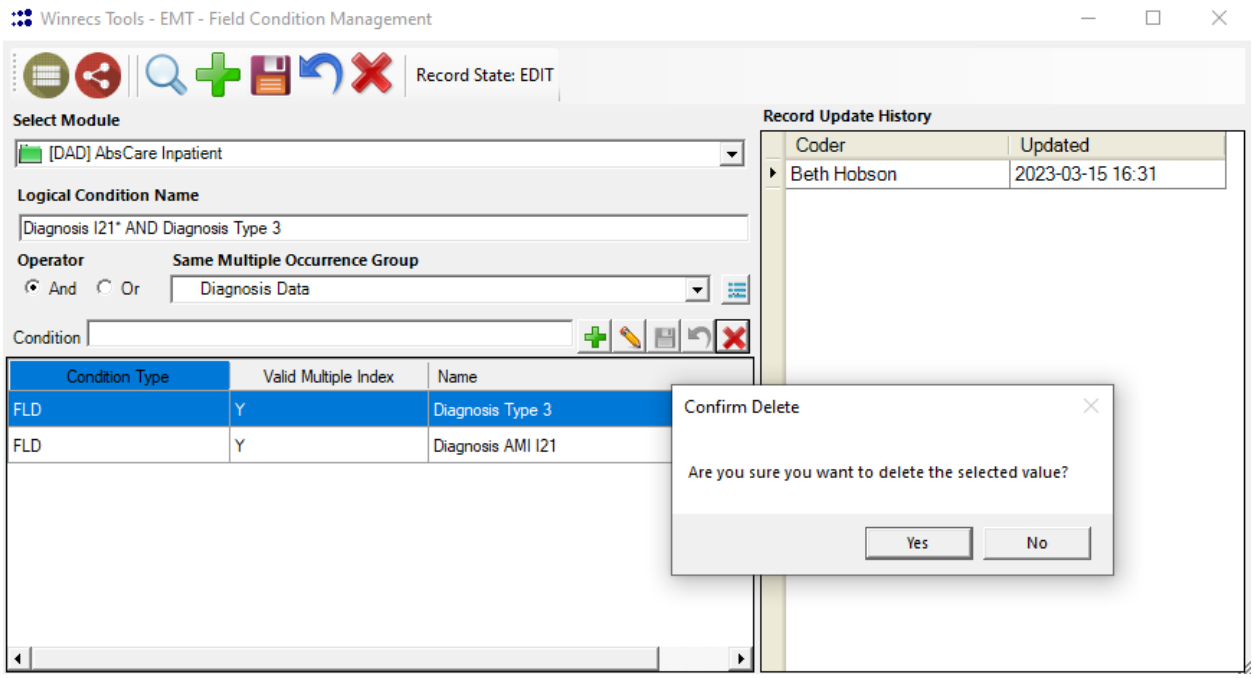


Save F7

Delete Condition

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

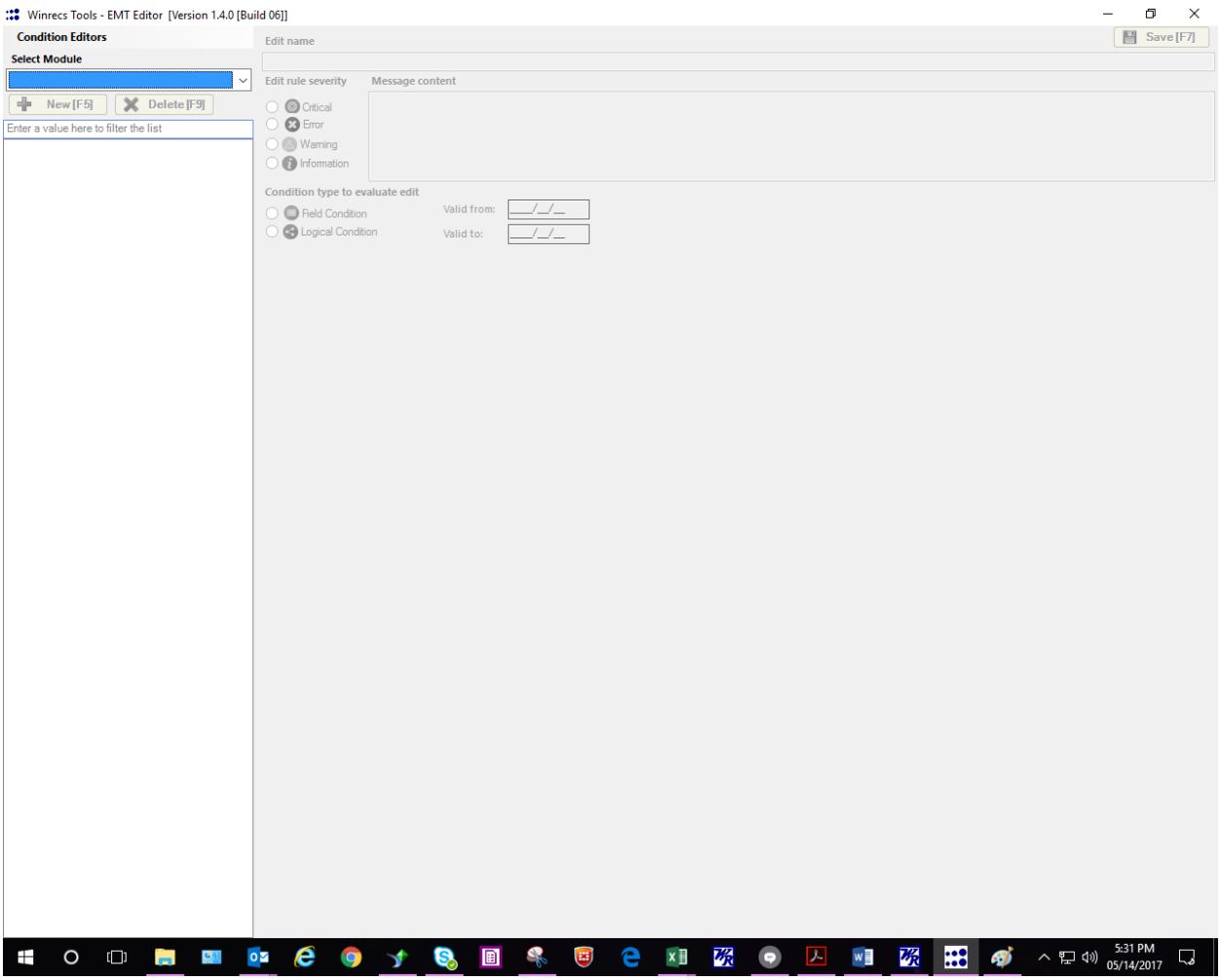
F9 Delete



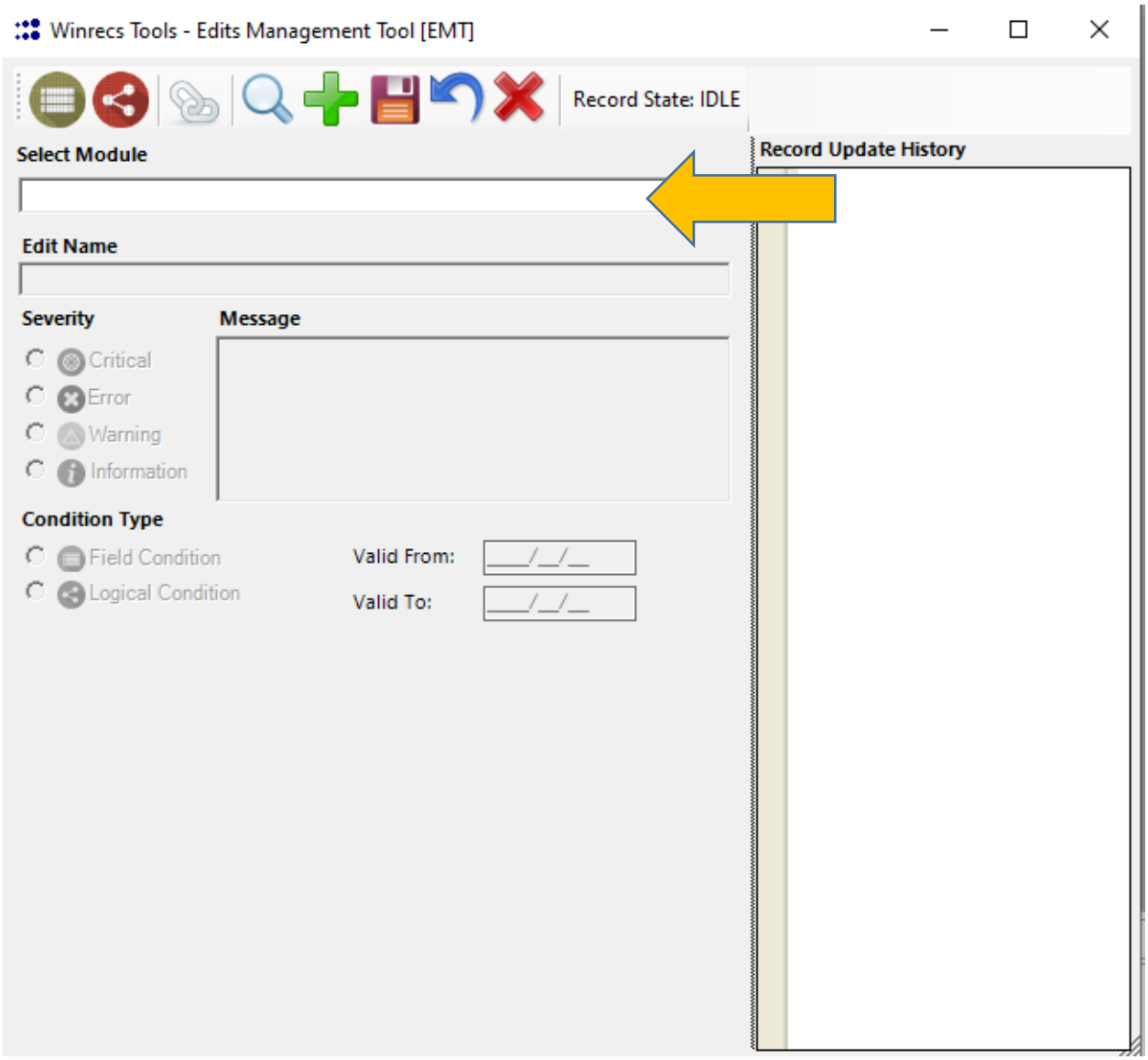
Click Yes to delete this logical condition.

Create Edit Message

Tools>Edits Management Tool (EMT)

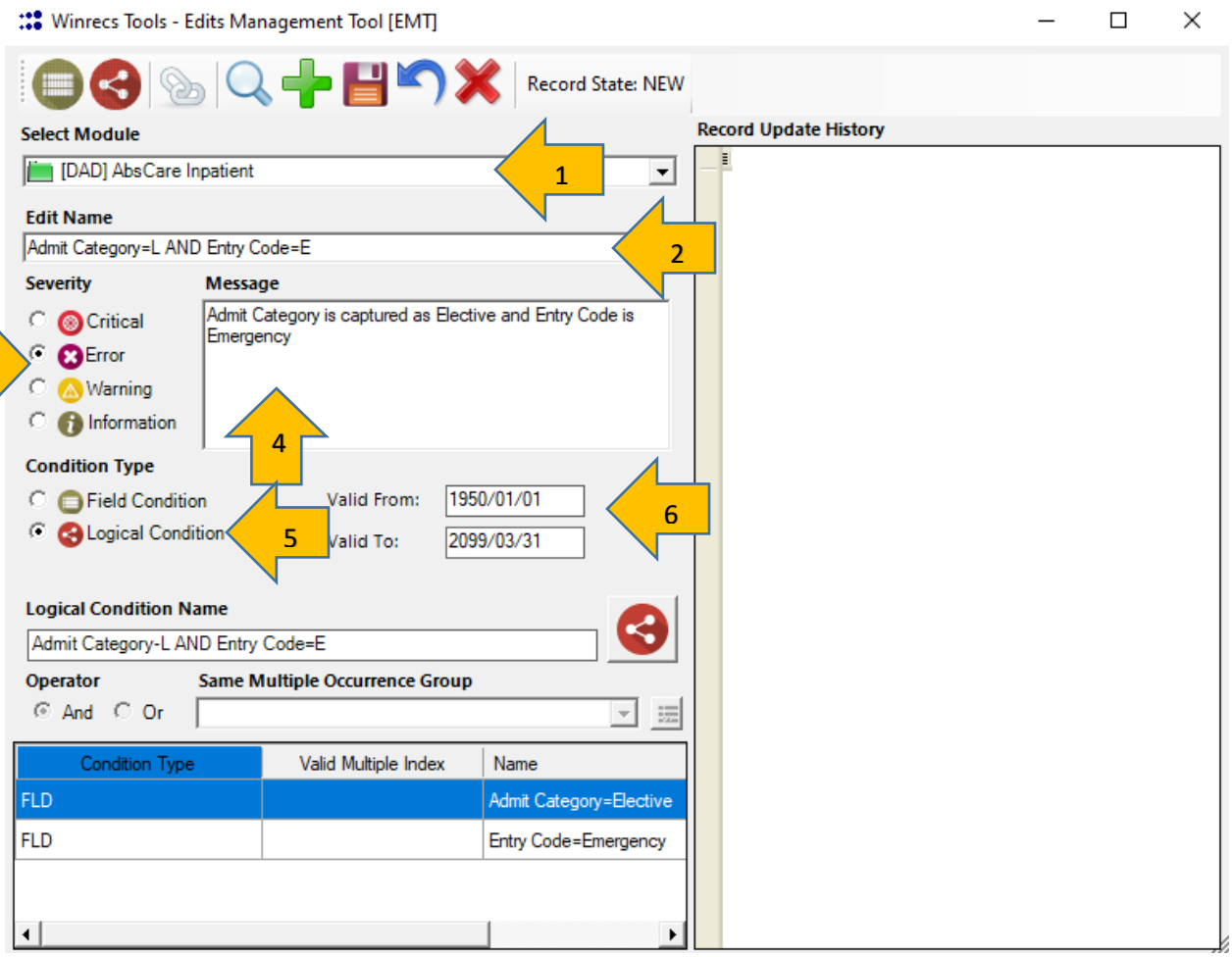


Select Module



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

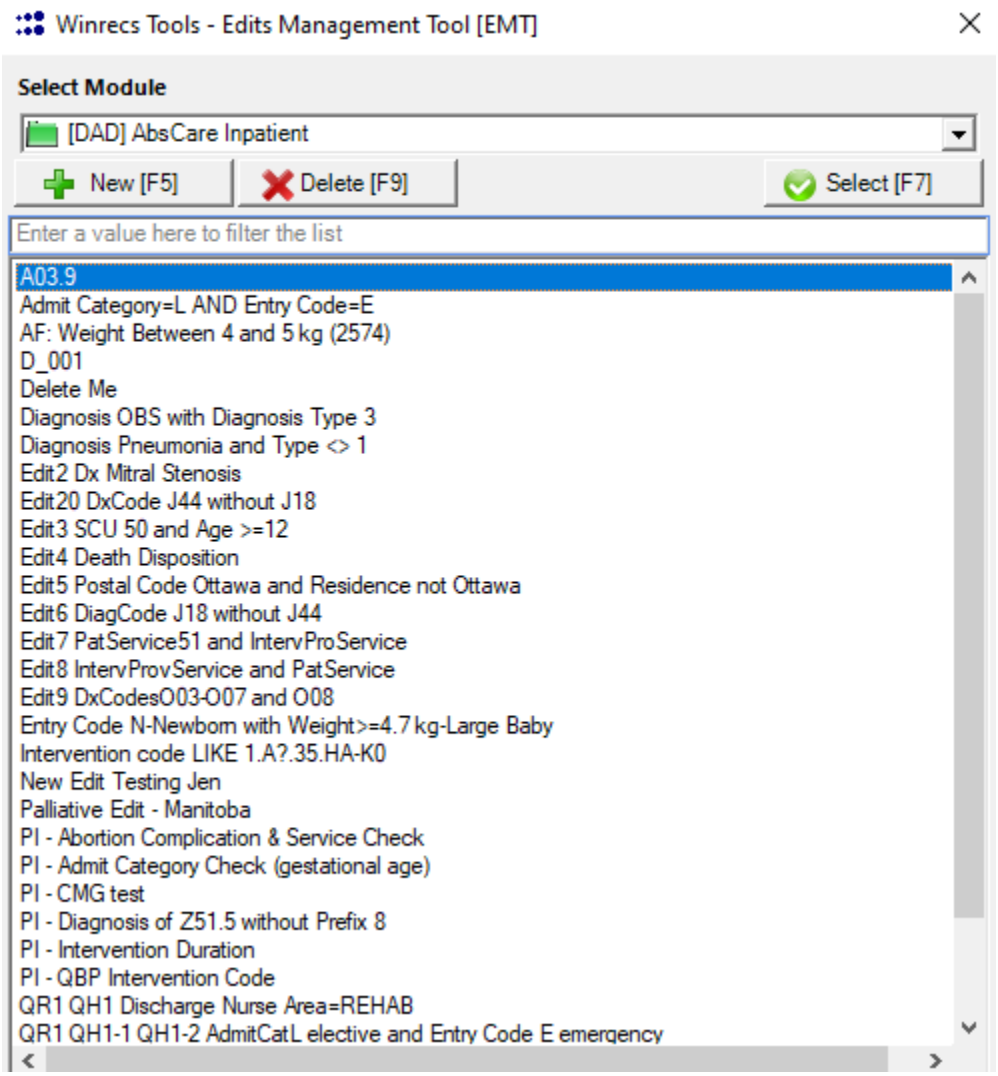
4. Message Content
   The content that will display in the abstract.

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

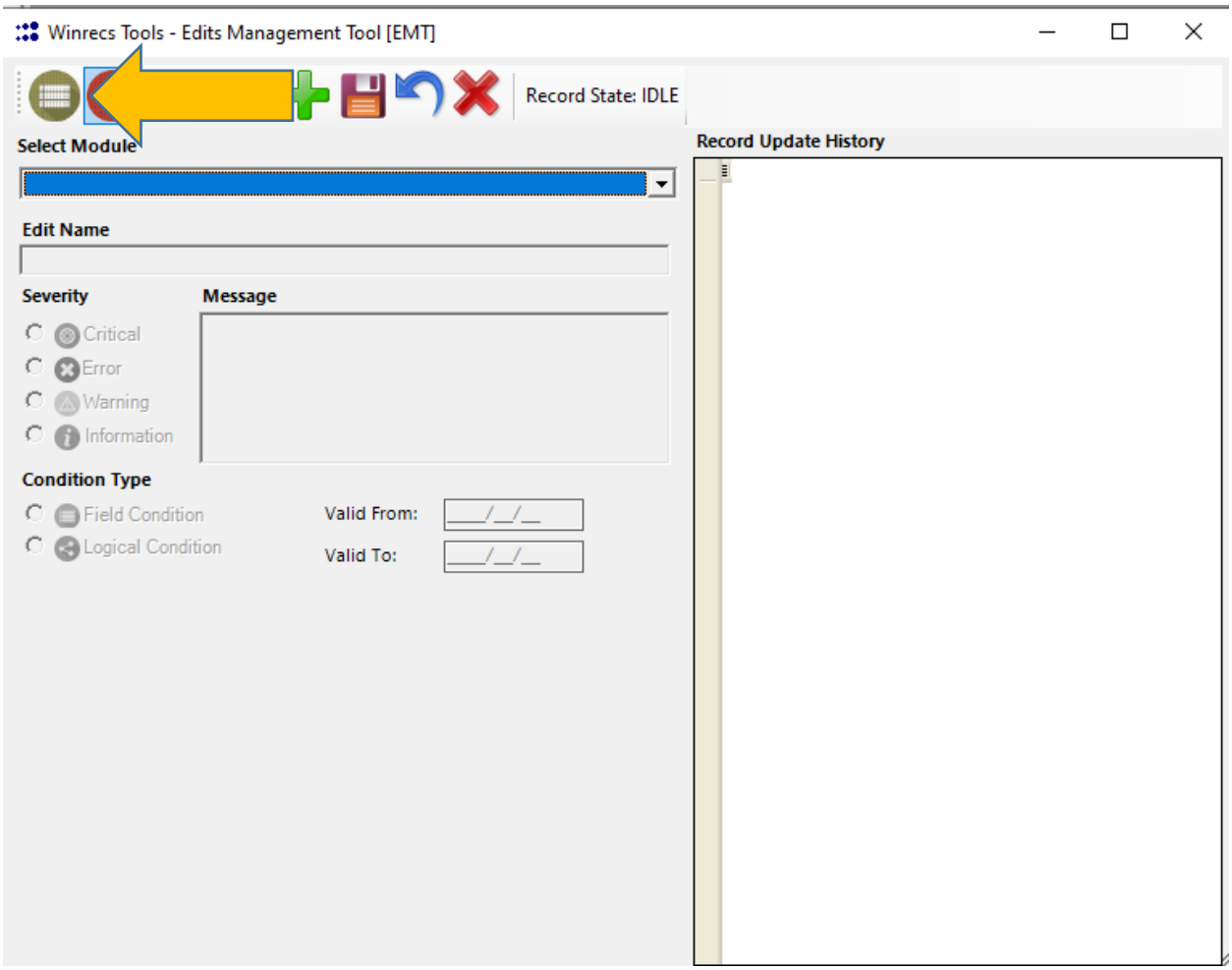
Scenario

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”

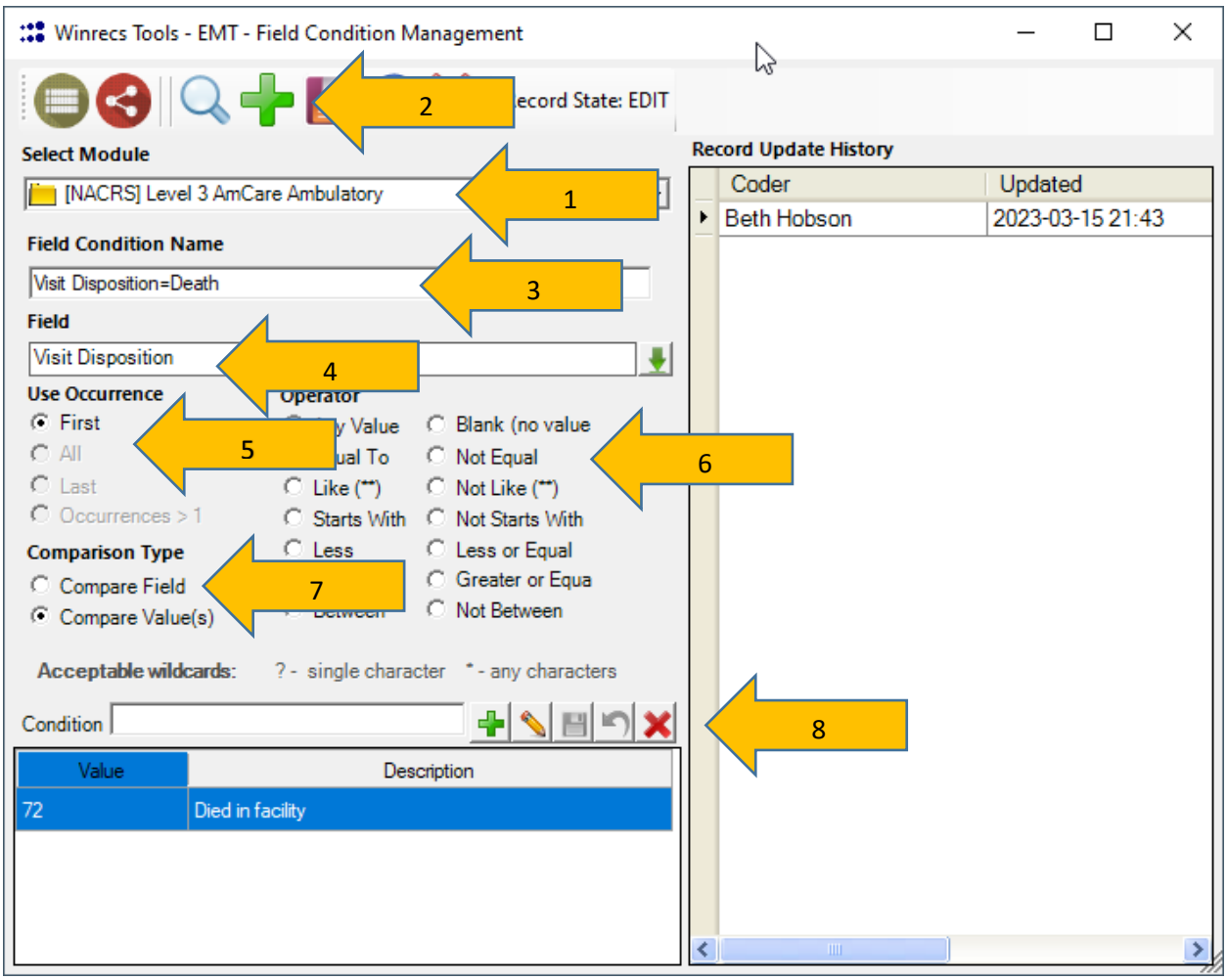
Step 1: Create Field Condition(s)

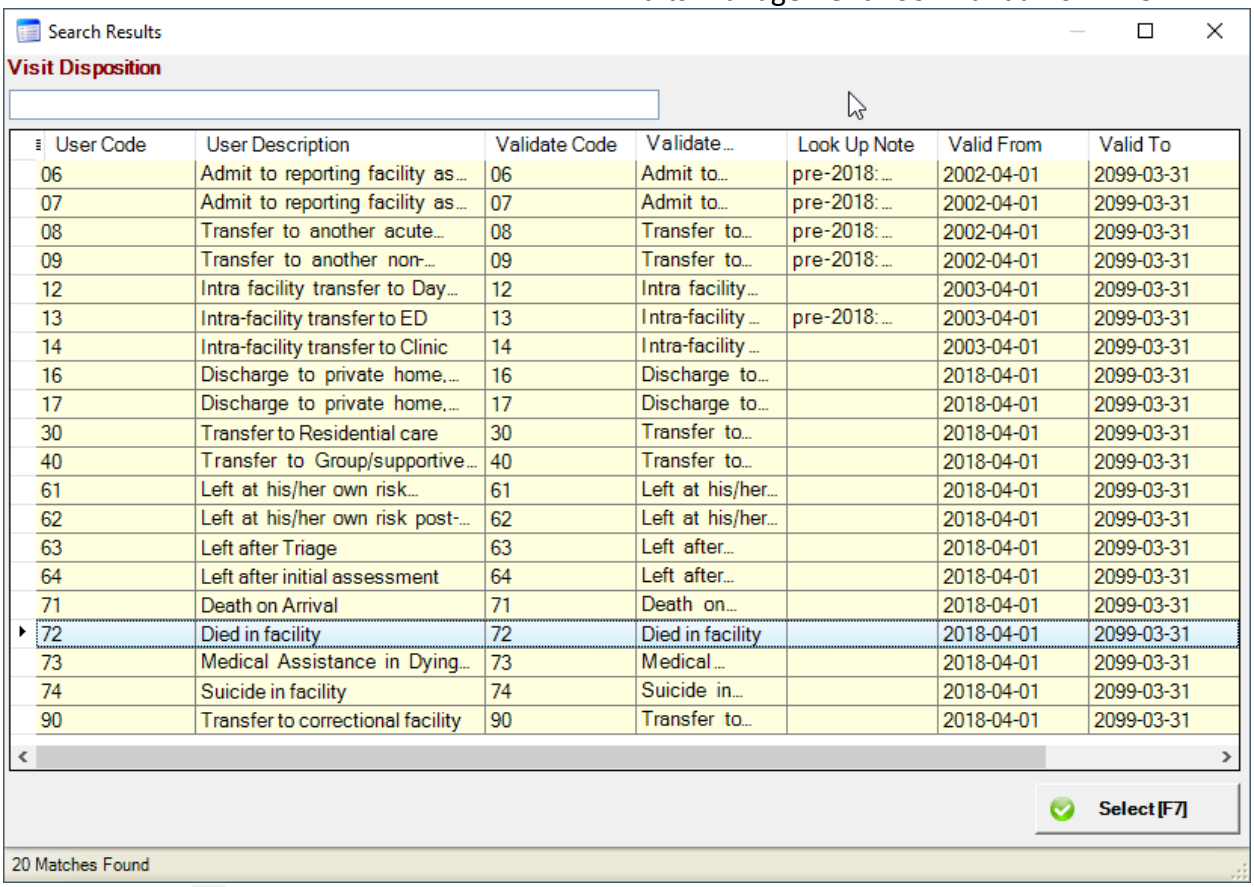
Click on Field Condition Editor



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

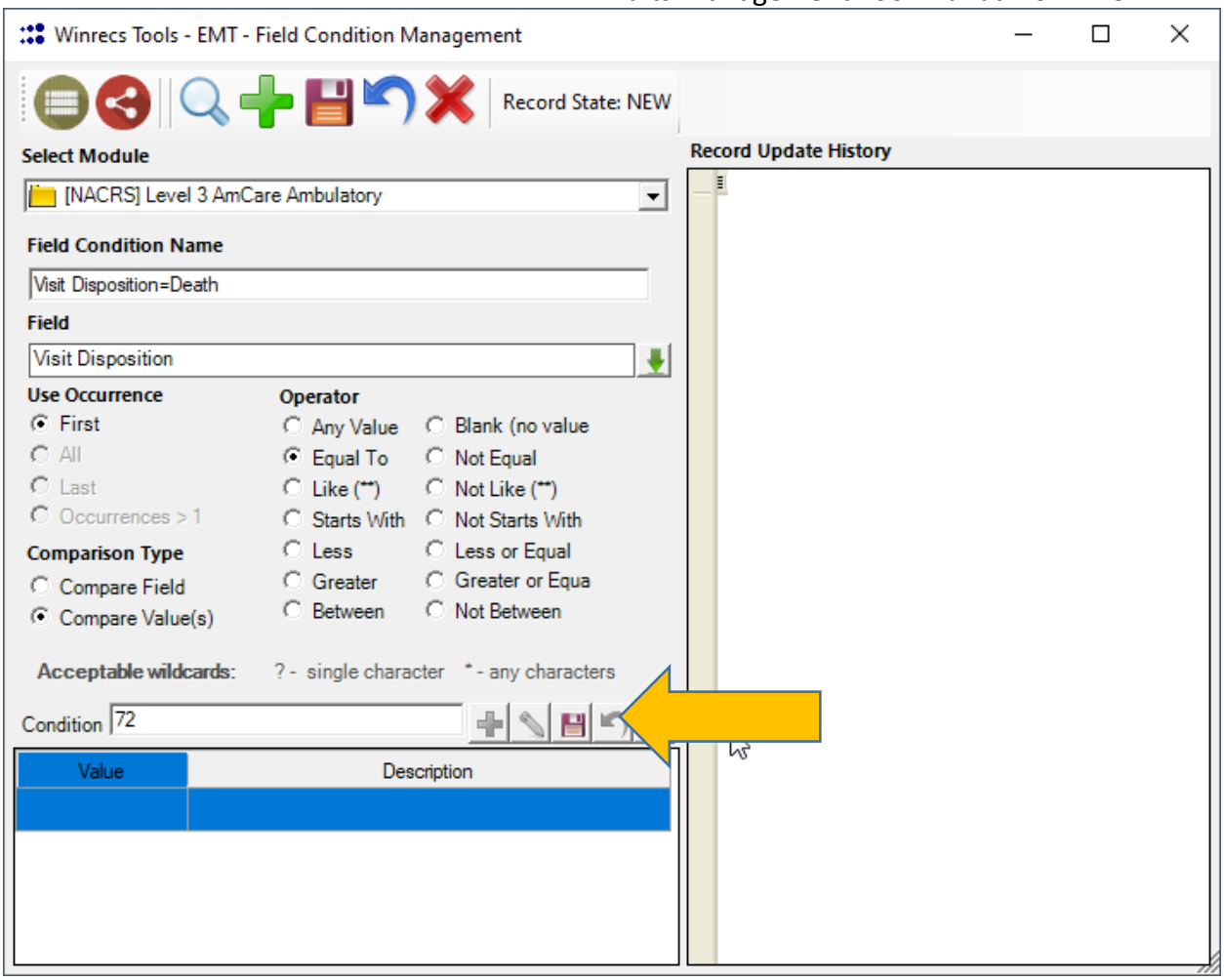
8 Click PLUS sign and select values





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

Click Save Icon to save value(s)


Winrecs Tools - EMT - Field Condition Management
Record State: NEW
Select Module
[NACRS] Level 3 AmCare Ambulatory
Field Condition Name
Visit Disposition=Death
Field
Visit Disposition
Use Occurrence
First
All
Last
Occurrences > 1
Comparison Type
Compare Field
Compare Value(s)
Operator
Any Value
Blank (no value
Equal To
Not Equal
Like (**)
Not Like (**)
Starts With
Not Starts With
Less
Less or Equal
Greater
Greater or Equa
Between
Not Between
Acceptable wildcards:
? - single character
* - any characters
Condition
72
Value
Description
Record Update History

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

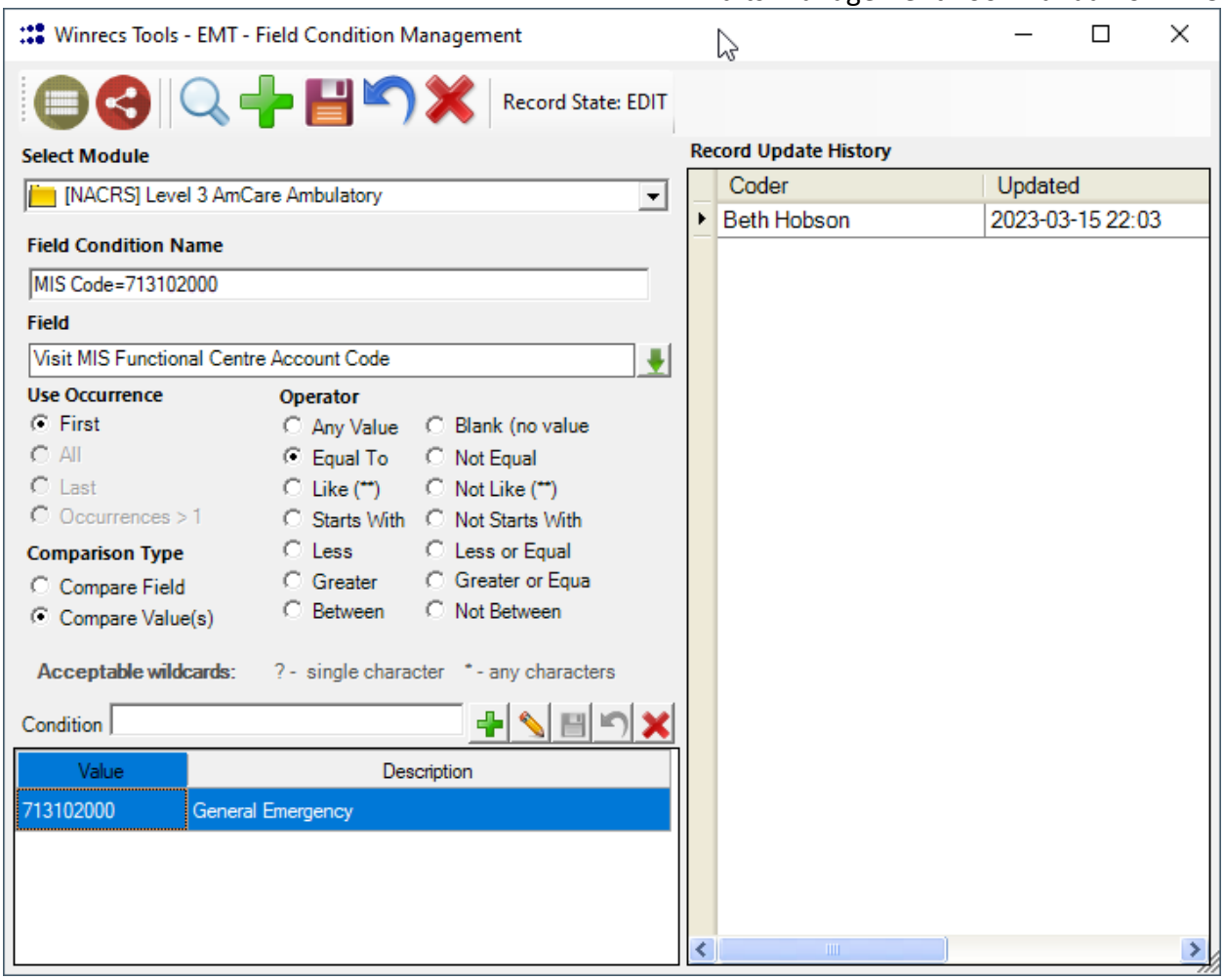
Comparison type

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

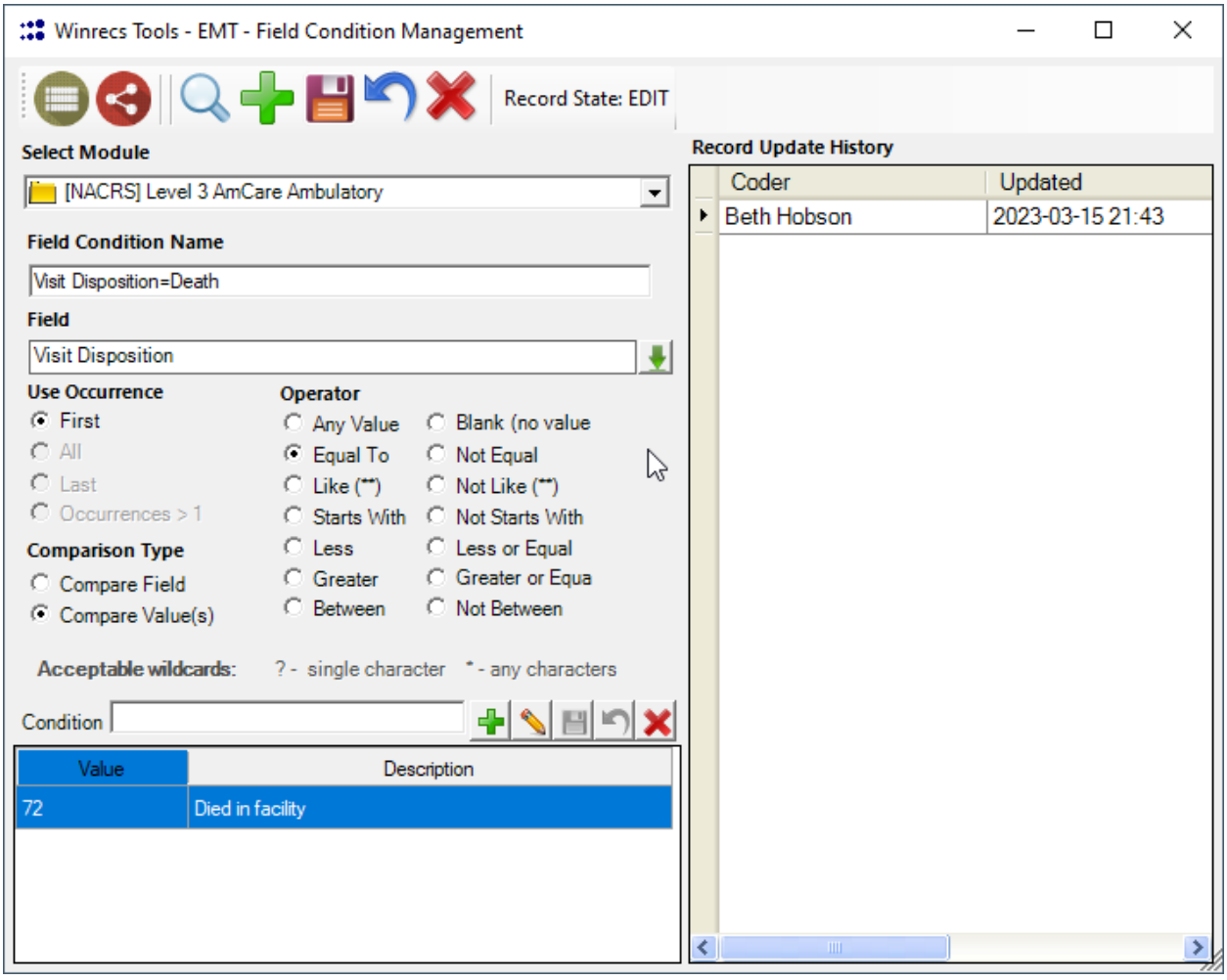
Comparison type

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

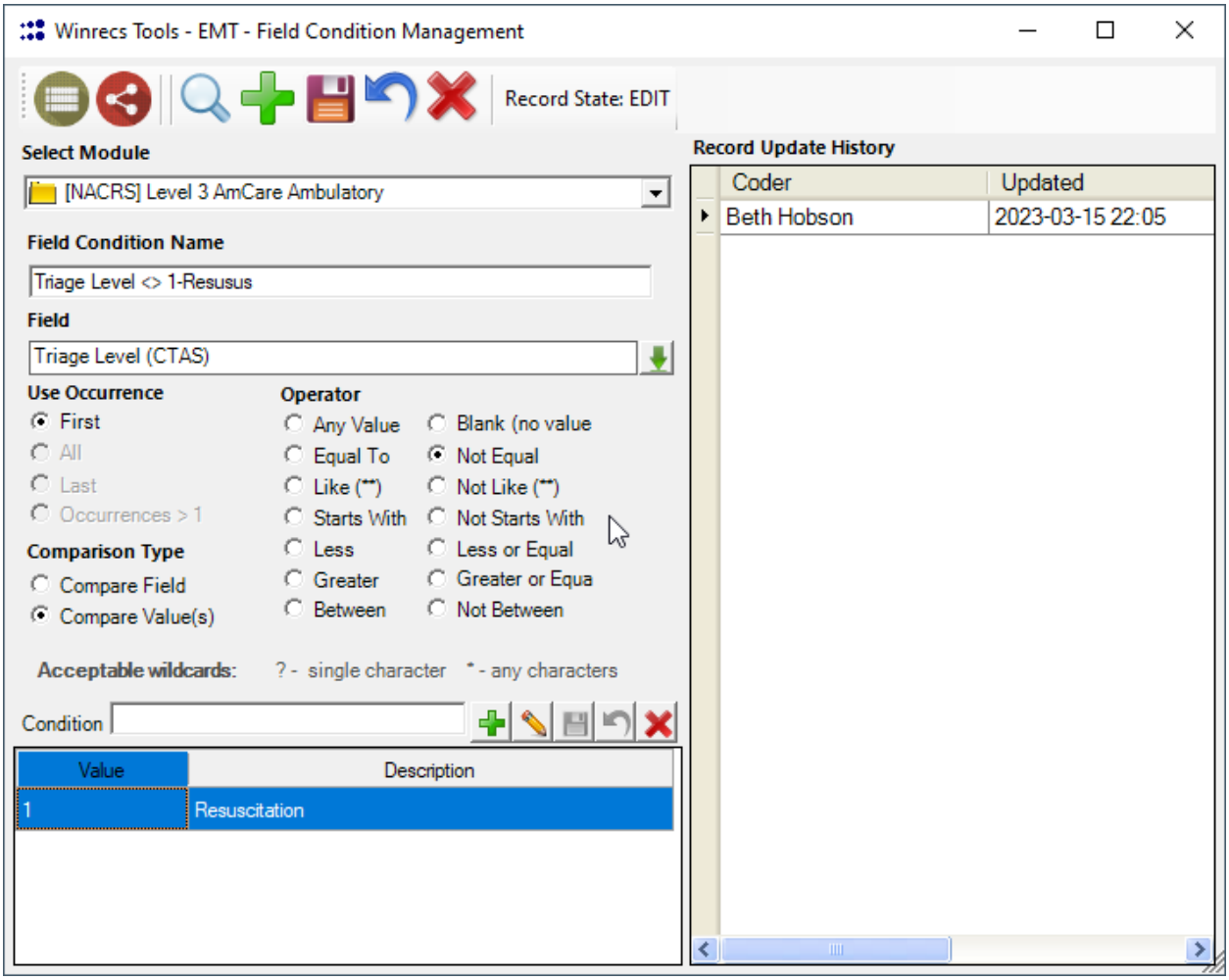
Comparison type

Compare value 1

Click Plus Icon to add value(s)

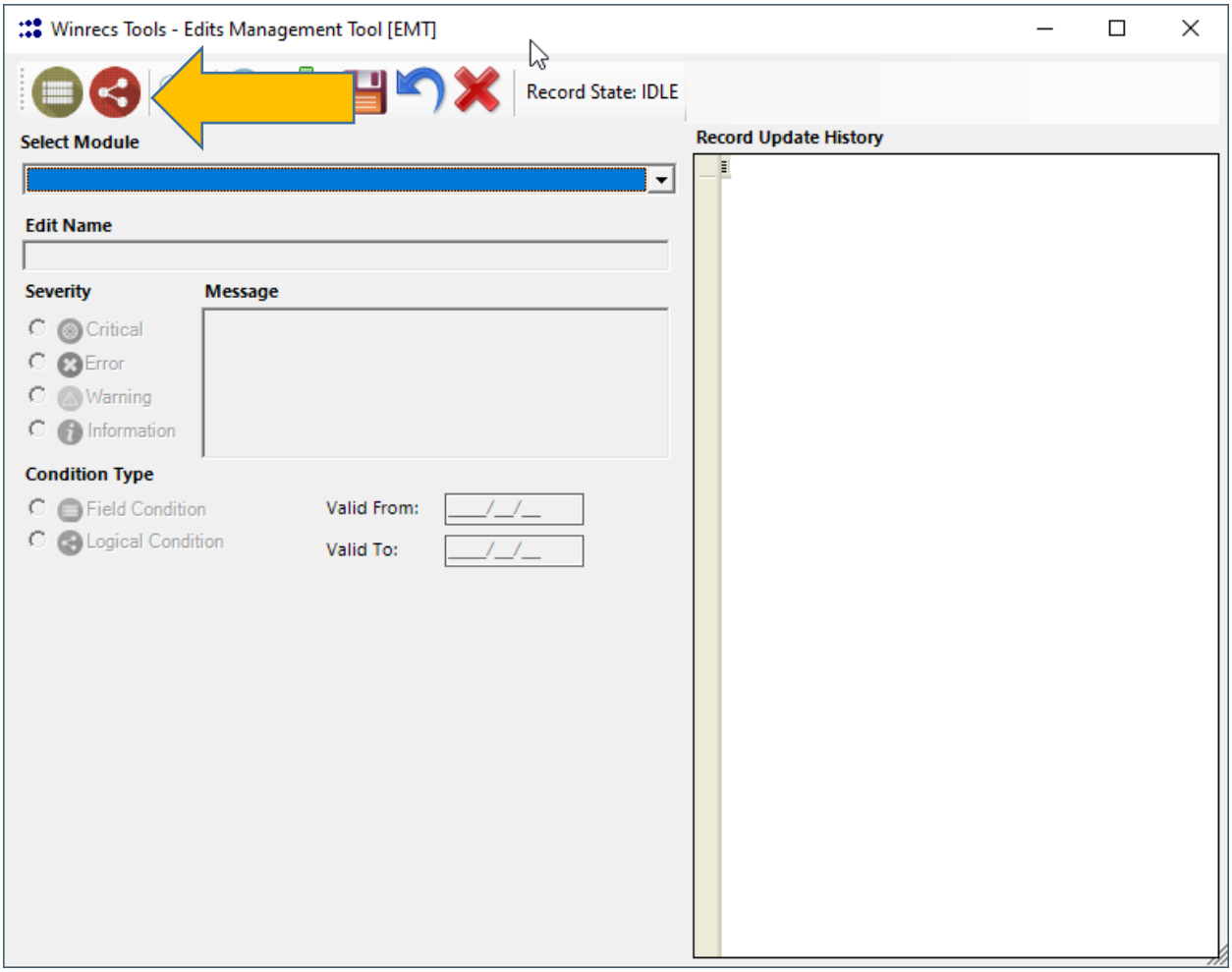
Click Save Icon to save value(s)

Save [F7]

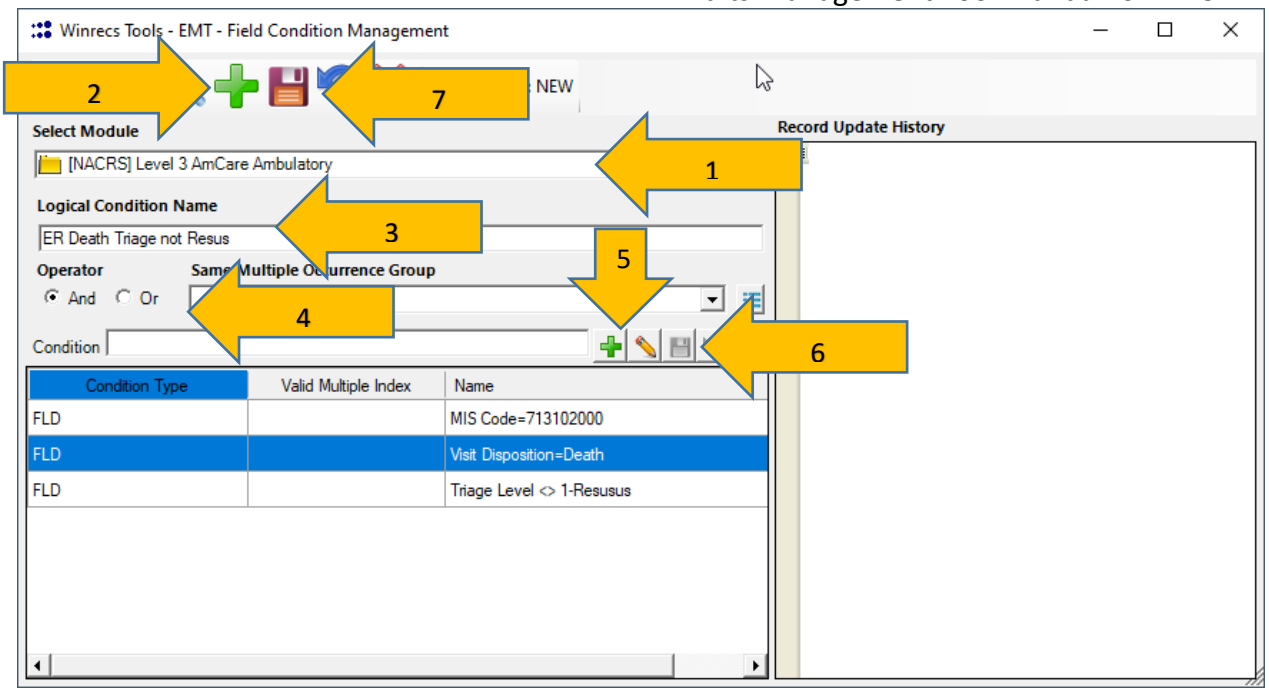


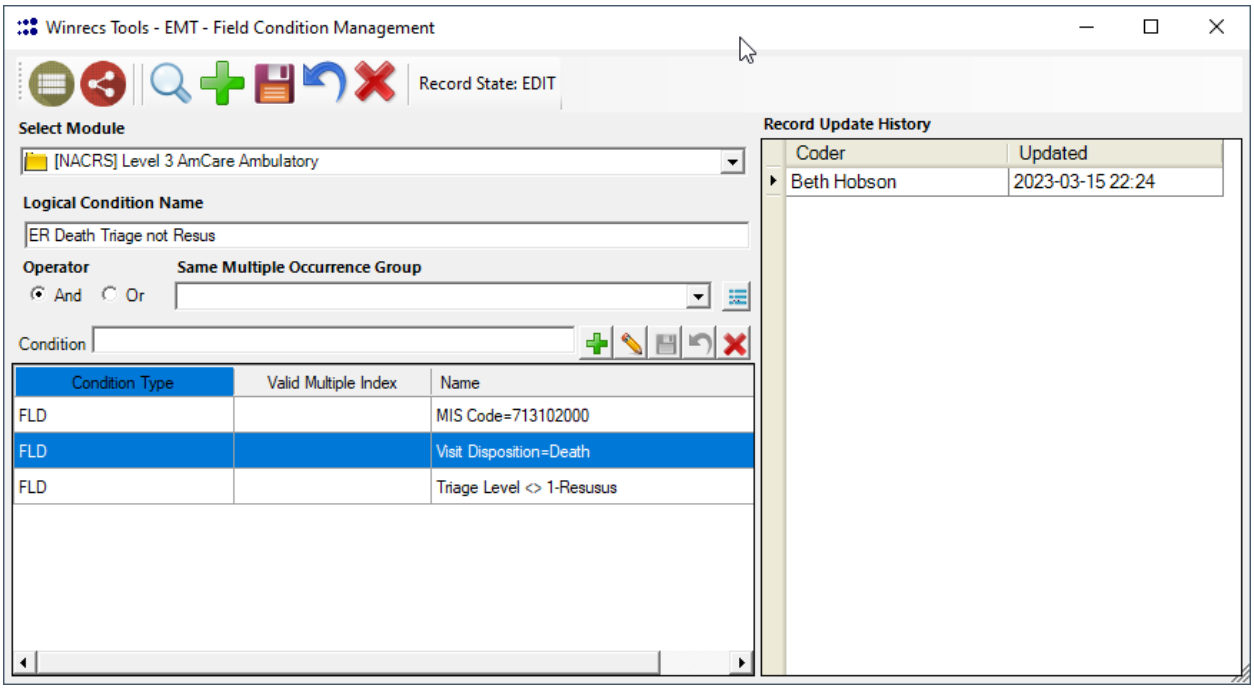
Step 2: Create Logical Condition(s)

Click on Logical Condition Editor



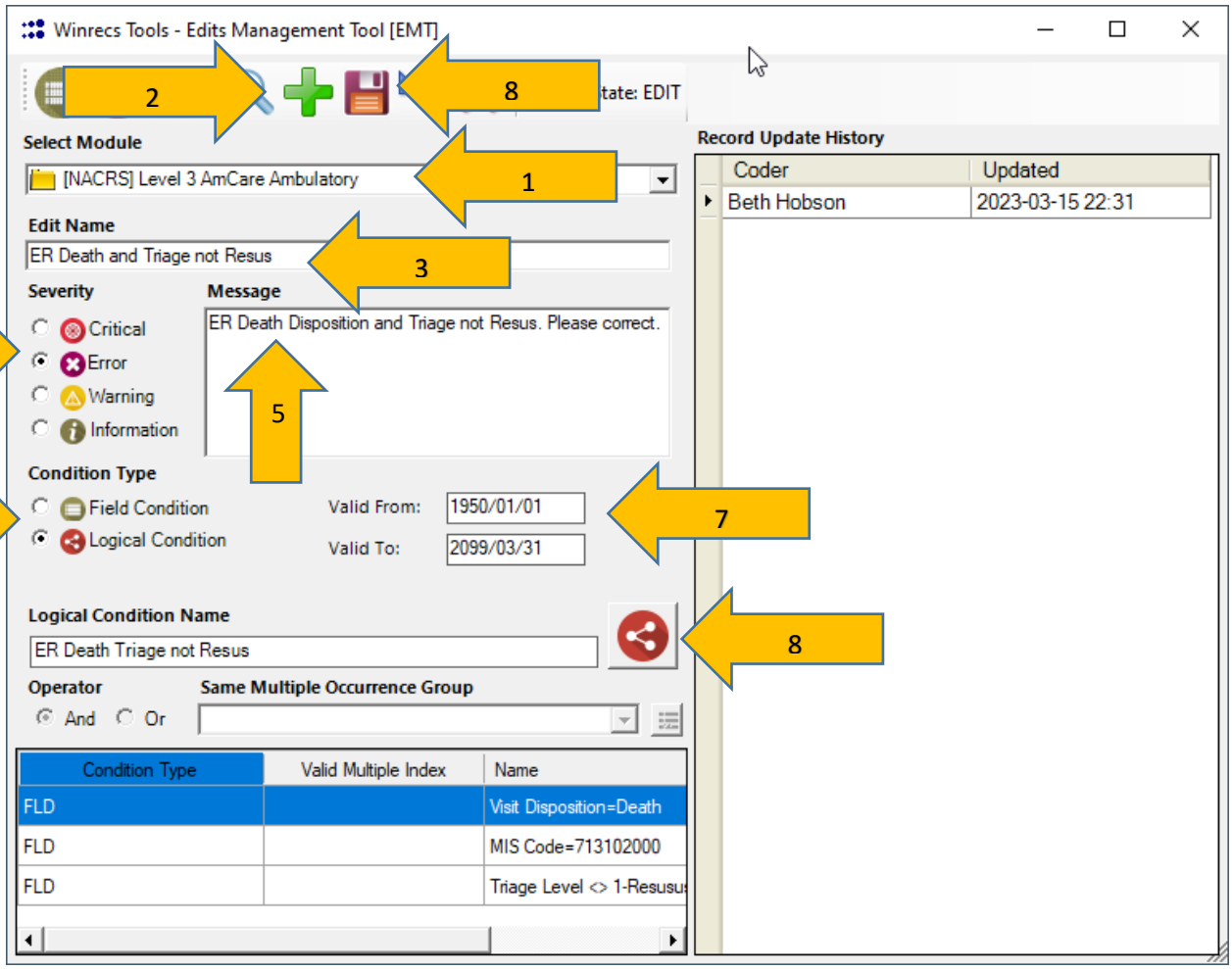
1. Select Module
2. Click NEW
3. Logical Condition Name
4. Select Operator
5. Select PLUS sign to add conditions
6. Click save to save conditions involved
7. Click save in Tool Bar


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


Winrecs Tools - EMT - Field Condition Management
Record State: EDIT
Select Module
[NACRS] Level 3 AmCare Ambulatory
Logical Condition Name
ER Death Triage not Resus
Operator
And
Or
Same Multiple Occurrence Group
Condition
Record Update History
Coder
Updated
Beth Hobson
2023-03-15 22:24
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.



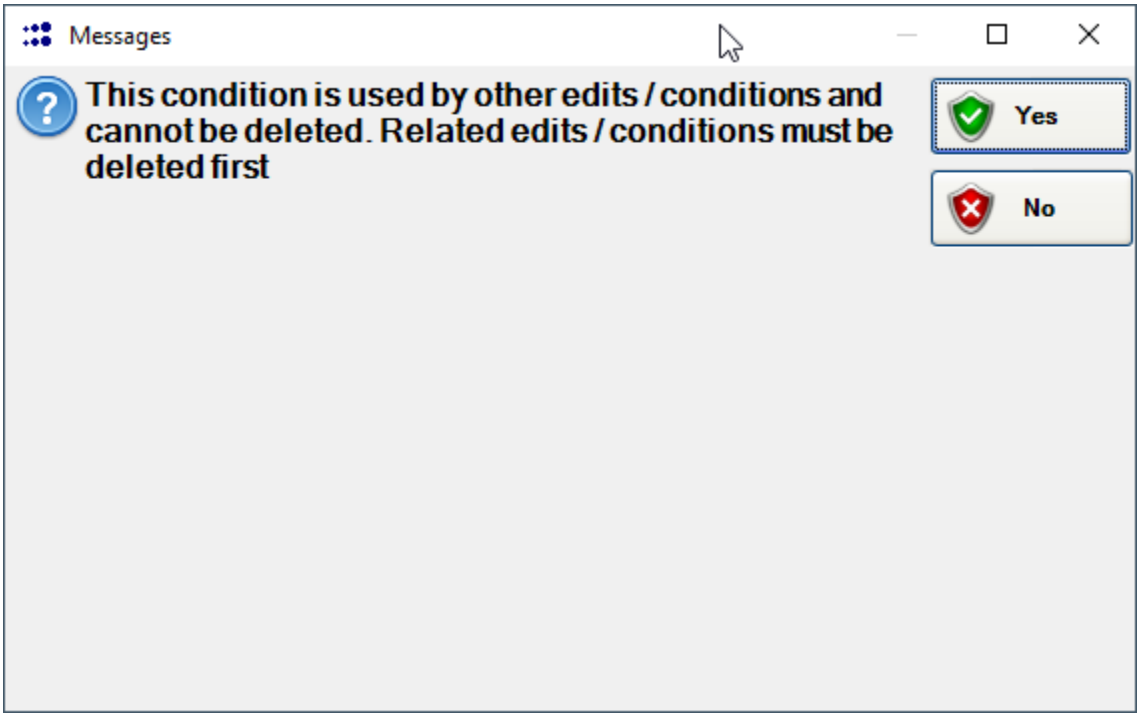
Deleting an Edit

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

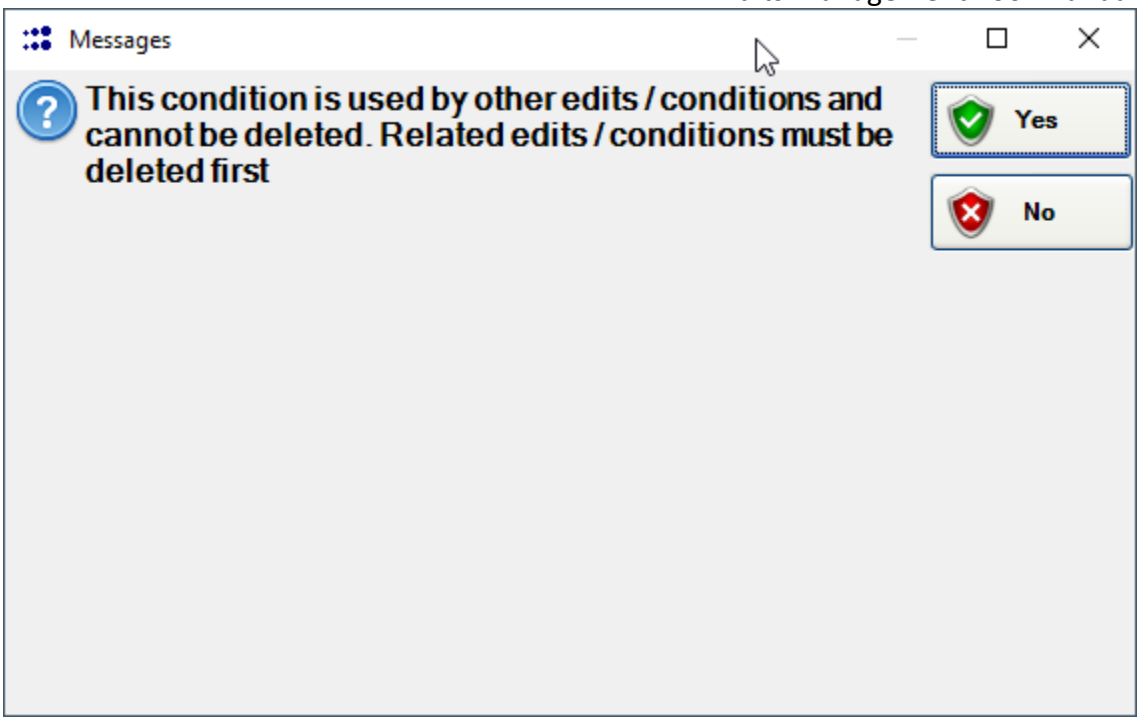
If a Logical Condition is used in another edit, a prompt will display.



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

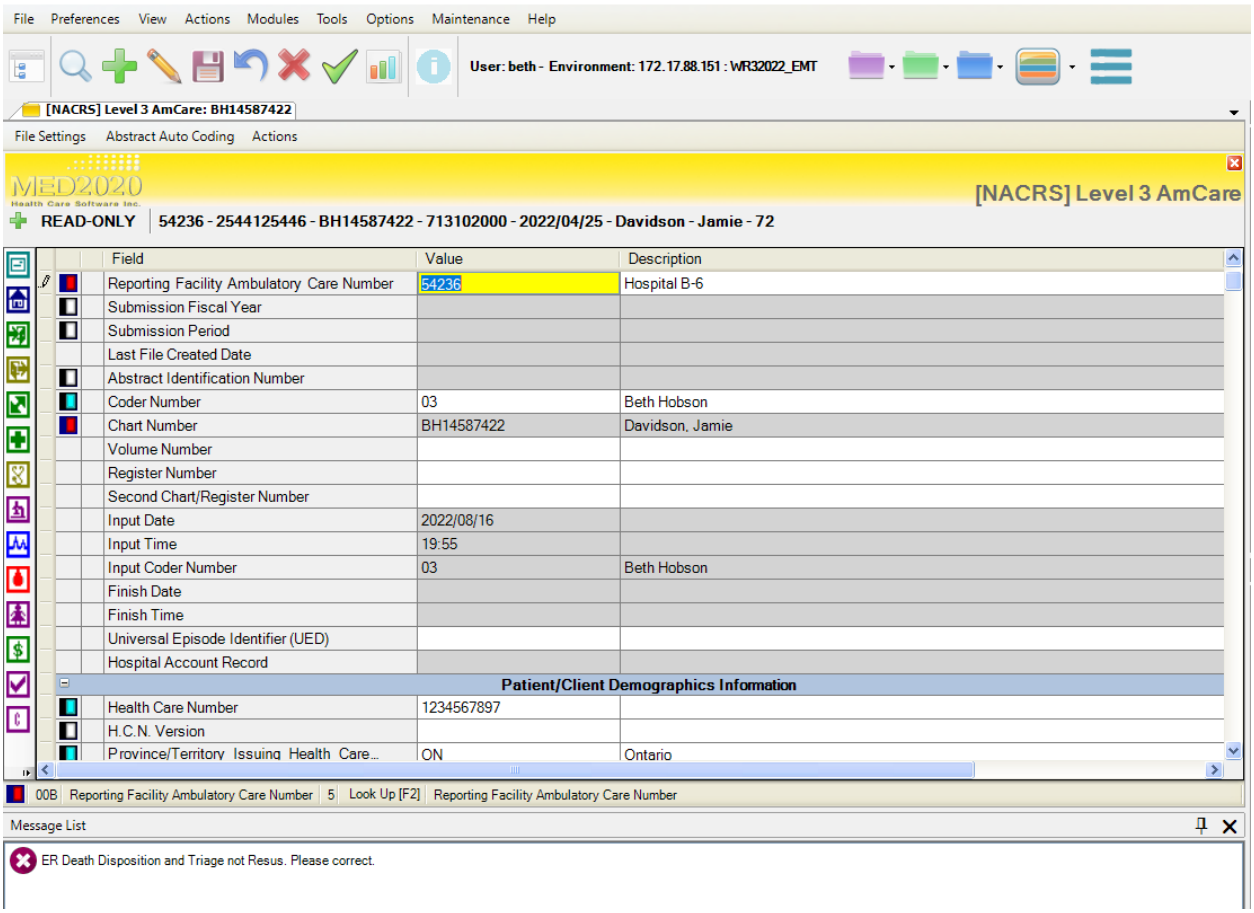
If a Field Condition is used in another edit, a prompt will display.


Messages
This condition is used by other edits / conditions and cannot be deleted. Related edits / conditions must be deleted first
Yes
No

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

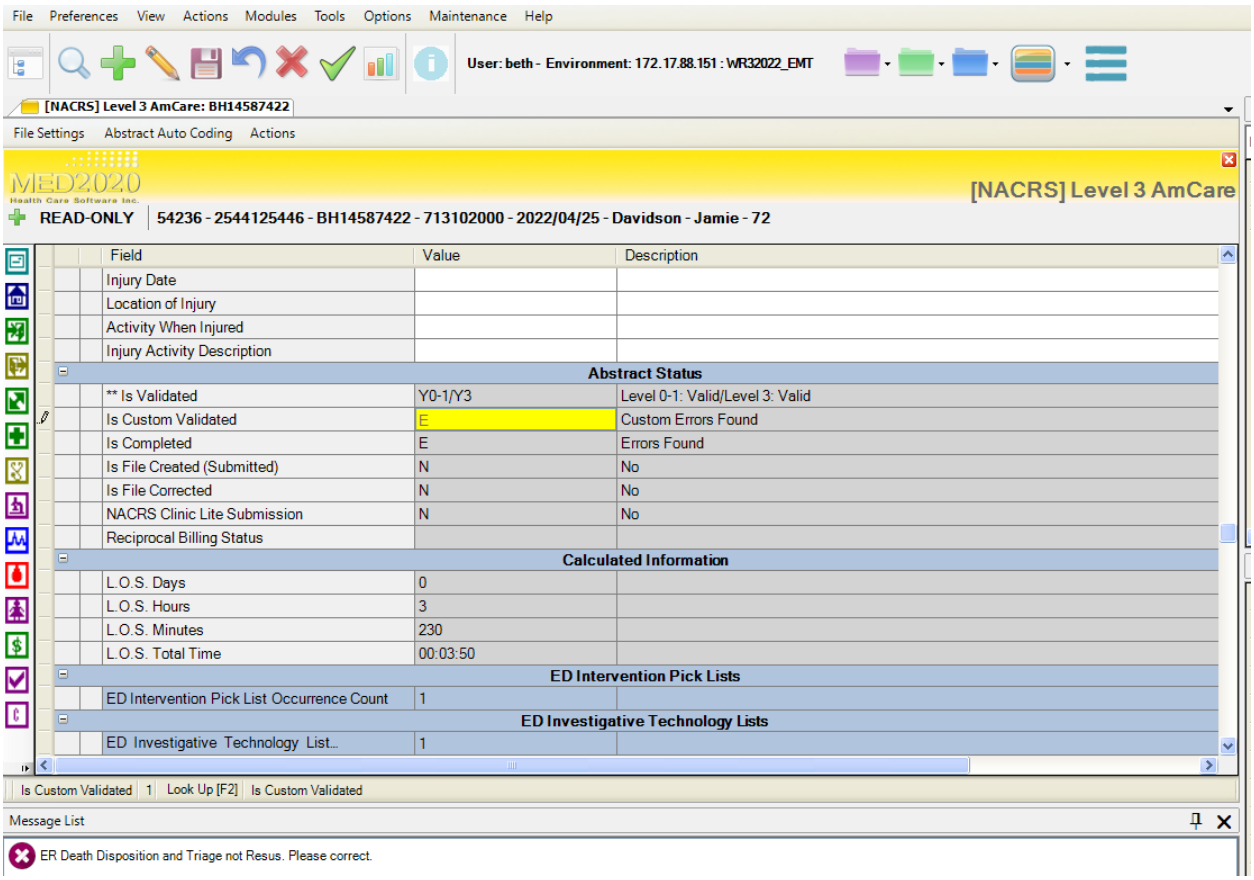
When there are EMT messages that contain warnings, the field will populate a W.

Custom Information Found

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

No

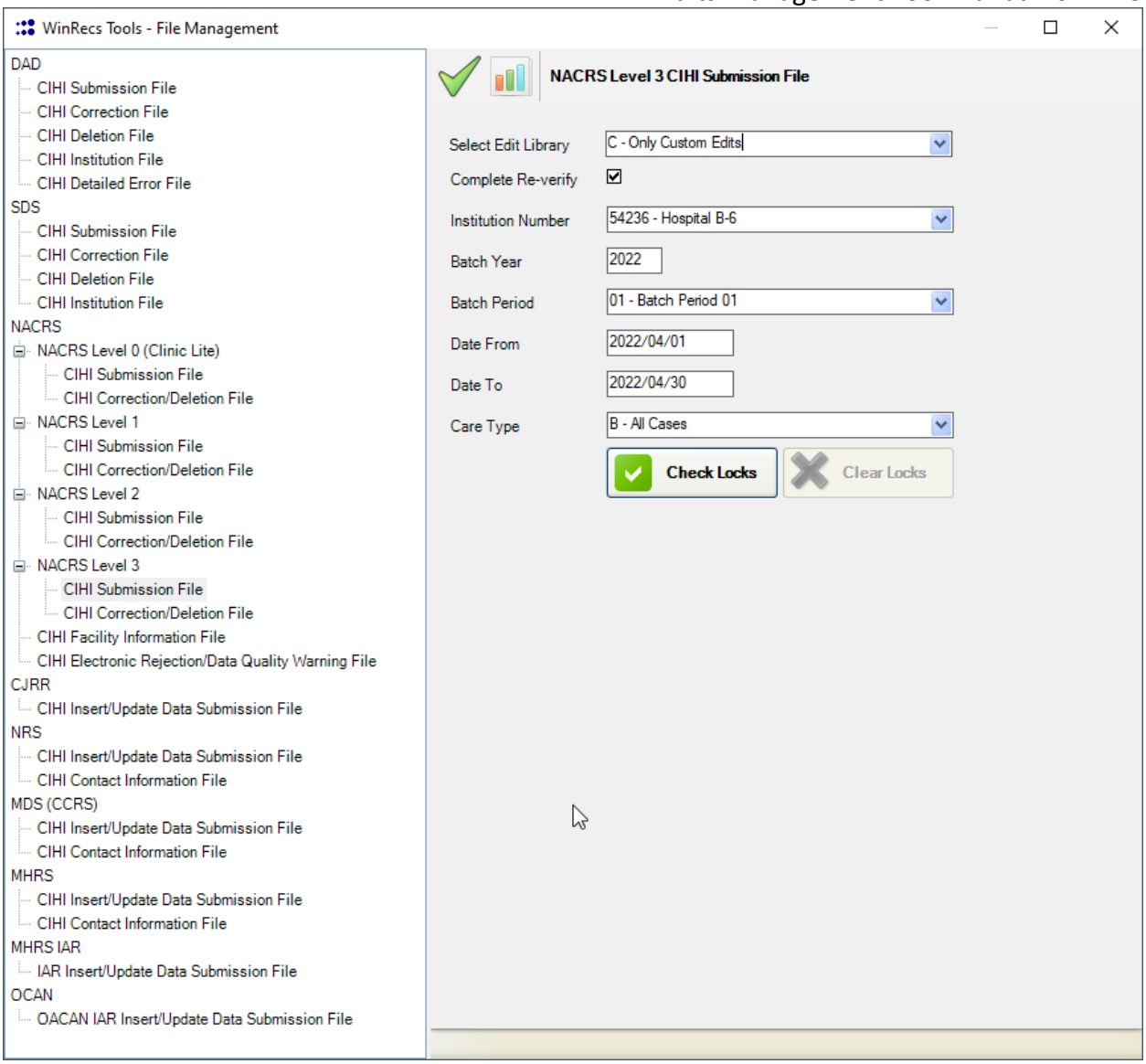
When EMT message are not yet verified in the abstract, this field will populate an N.



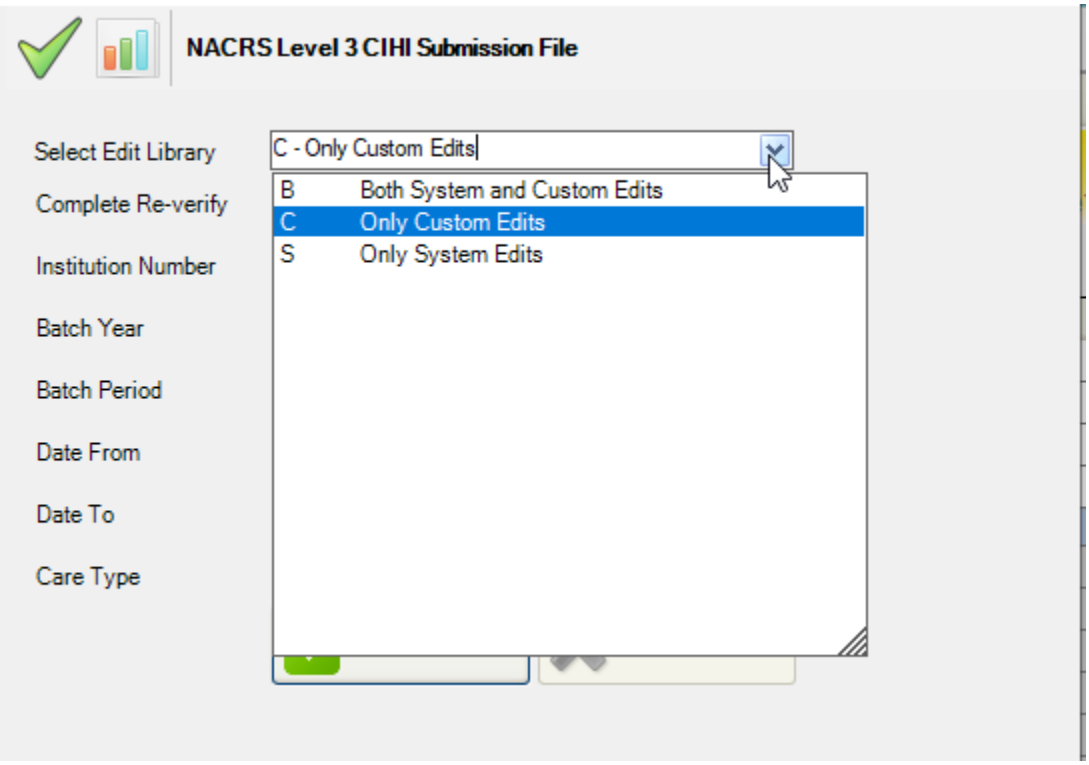
Batch Verify

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

Tools>File Management>Submission File


WinRecs Tools - File Management
DAD
CIHI Submission File
CIHI Correction File
CIHI Deletion File
CIHI Institution File
CIHI Detailed Error File
SDS
CIHI Submission File
CIHI Correction File
CIHI Deletion File
CIHI Institution File
NACRS
NACRS Level 0 (Clinic Lite)
CIHI Submission File
CIHI Correction/Deletion File
NACRS Level 1
CIHI Submission File
CIHI Correction/Deletion File
NACRS Level 2
CIHI Submission File
CIHI Correction/Deletion File
NACRS Level 3
CIHI Submission File
CIHI Correction/Deletion File
CIHI Facility Information File
CIHI Electronic Rejection/Data Quality Warning File
CJRR
CIHI Insert/Update Data Submission File
NRS
CIHI Insert/Update Data Submission File
CIHI Contact Information File
MDS (CCRS)
CIHI Insert/Update Data Submission File
CIHI Contact Information File
MHRS
CIHI Insert/Update Data Submission File
CIHI Contact Information File
MHRS IAR
IAR Insert/Update Data Submission File
OCAN
OACAN IAR Insert/Update Data Submission File
NACRS Level 3 CIHI Submission File
Select Edit Library
C - Only Custom Edits
Complete Re-verify
Institution Number
54236 - Hospital B-6
Batch Year
2022
Batch Period
01 - Batch Period 01
Date From
2022/04/01
Date To
2022/04/30
Care Type
B - All Cases
Check Locks
Clear Locks

Select Edit Library

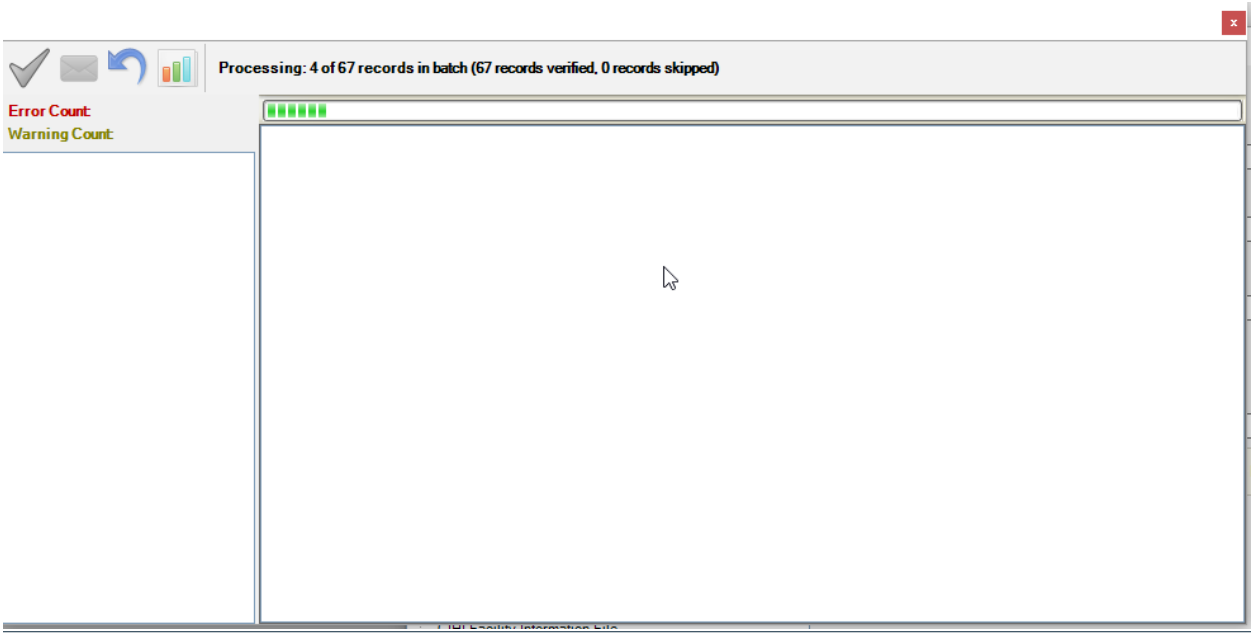


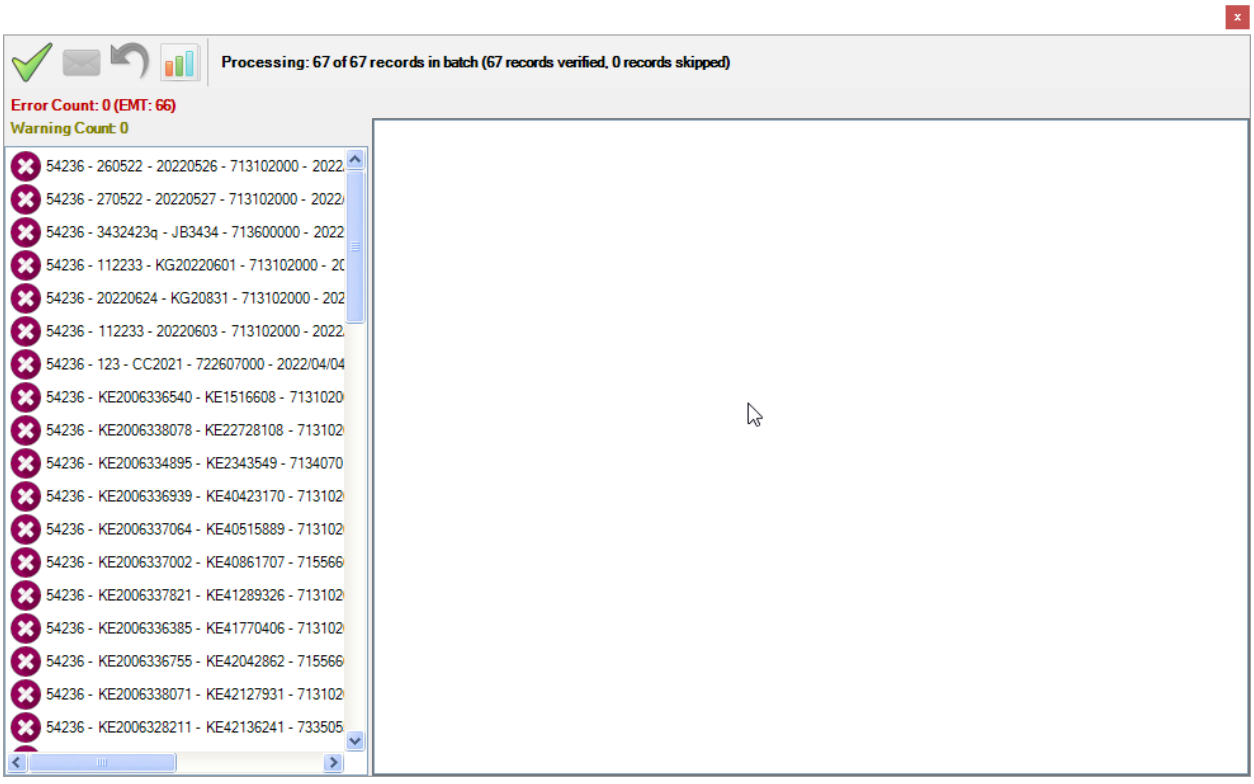
Both System and Custom Edits
This will perform the verify on the CIHI or provincial edits along with EMT edits at the same time.

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





Report Generator

Existing views have been modified

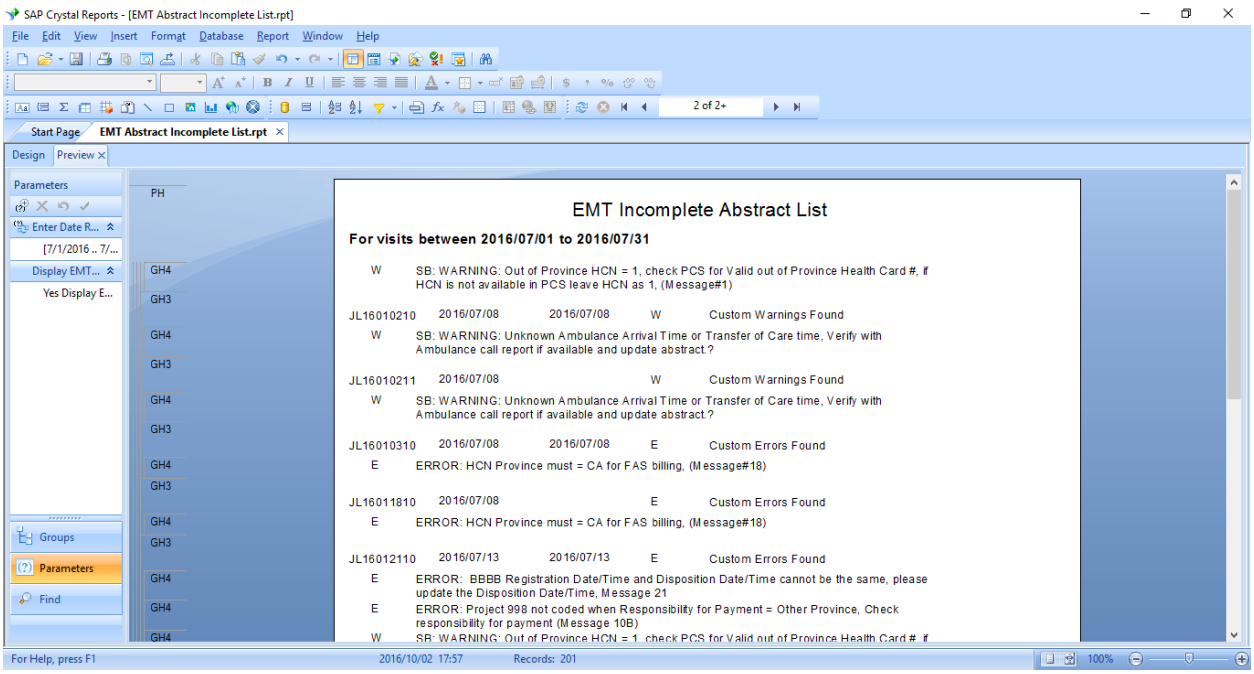
AbstractingErrorsWarnings_VR

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.



Example of Scenarios

Amcare Module

If MIS Code NOT 713102000 AND Provider Specialty =00080 (Radiologist) AND Intervention Location NOT 06-Diagnostic Imaging AND Intervention Code is NOT CANCELLED generate message.

UDE 006: Radiologist Provider entered must have an Intervention Location Diagnosis Imaging 06

If Intervention Code 1ZZ35HAM9 or 1ZZ35HAM5 AND MIS Code <> 713102000 OR Intervention Location not 04 generate message

UDE 003: If Intervention Code is Pharmacotherapy must be an ER visit with Intervention Location 04

If ER visit AND Access to Primary Health Code is 9-Unknown or Unavailable AND Disposition Code is not death code 10 (DAA) or 11 (DOA) OR Triage Level is not 1-Resuscitation generate message.

UDE 007: Access to Primary Health Care Code is invalid according to Triage Level or Disposition Code

Inpatient Module

If Special Care Unit is 50 (Neonatal Intensive Care) AND Age Code in M or Y OR Age Number is >=12 of patient is over a year old generate message.

UDE 003: Patient in Special Care Unit 50 and Age over 1 year old