

CREATIVE DATA TECHNOLOGIES, INC.

OAS CAHPS Desktop Program



USER'S MANUAL

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II. OVERVIEW OF THE OAS CAHPS DESKTOP PROGRAM

The Centers for Medicare & Medicaid Services (CMS) have introduced a new mandate for all Ambulatory Surgery Centers in the U.S. to conduct monthly surveys and report the resulting survey data to them. More on this requirement can be found here <https://www.cms.gov/data-research/research/consumer-assessment-healthcare-providers-systems/outpatient-and-ambulatory-surgery-cahps>

Creative Data Technologies, Inc. is providing an Outpatient and Ambulatory Surgery (OAS) CAHPS Survey Desktop Program to help surgery centers send their patient encounter data to their selected survey company to conduct the surveys.

Per this new CMS requirement, all U.S. surgery centers must make a good-faith attempt to conduct these surveys. Furthermore, there are only a handful of Survey Vendors that CMS is allowing to conduct these surveys. Only vendors with an asterisk * next to their names are currently approved: Click here for the list <https://oascahps.org/General-Information/Approved-Survey-Vendors>

In order to submit your data to these Survey Vendors, an Excel Spreadsheet with a very specific layout must be used:

Requirements: <http://www.creativedatatech.com/downloads/CAHPSRequirements.pdf>

File Layout: <http://www.creativedatatech.com/downloads/CAHPSLayout.pdf>

We are working closely with JL Morgan & Associates on the survey data submission process. You can contact them here about their services: <https://www.jlmorganandassociates.com/cahps>

Here is how our OAS CAHPS Reporting Service fits into the big picture: If you need help extracting the required data each month from your EMR/EHR system to prepare the spreadsheet file and upload it securely via Secure-FTP (SFTP) to the vendor, our OAS CAHPS Desktop Program (Service) can help you automate this process by connecting to your EMR/EHR back-end database to run custom SQL queries to extract the data, generate the Excel Spreadsheet, and upload the Spreadsheet via Secure-FTP to your survey vendor.

III. GETTING STARTED

System Requirements:

The OAS CAHPS Service is a Desktop Program targeted to run on Windows 10 or 11. The requirements are minimal. You will need at least an Intel Core i5 class computer (or higher) running at 500Mhz or faster, with at least 4GB of RAM.

The program also requires the Microsoft.NET Framework v4.8, which is installed by default on most Windows 10 & 11 computers. Furthermore, when you first launch the program, it will automatically detect if the .NET Framework v4.8 is missing, and it will assist you in downloading and installing it (no admin rights are required).

Obtaining a UserID and Password to log into the Program:

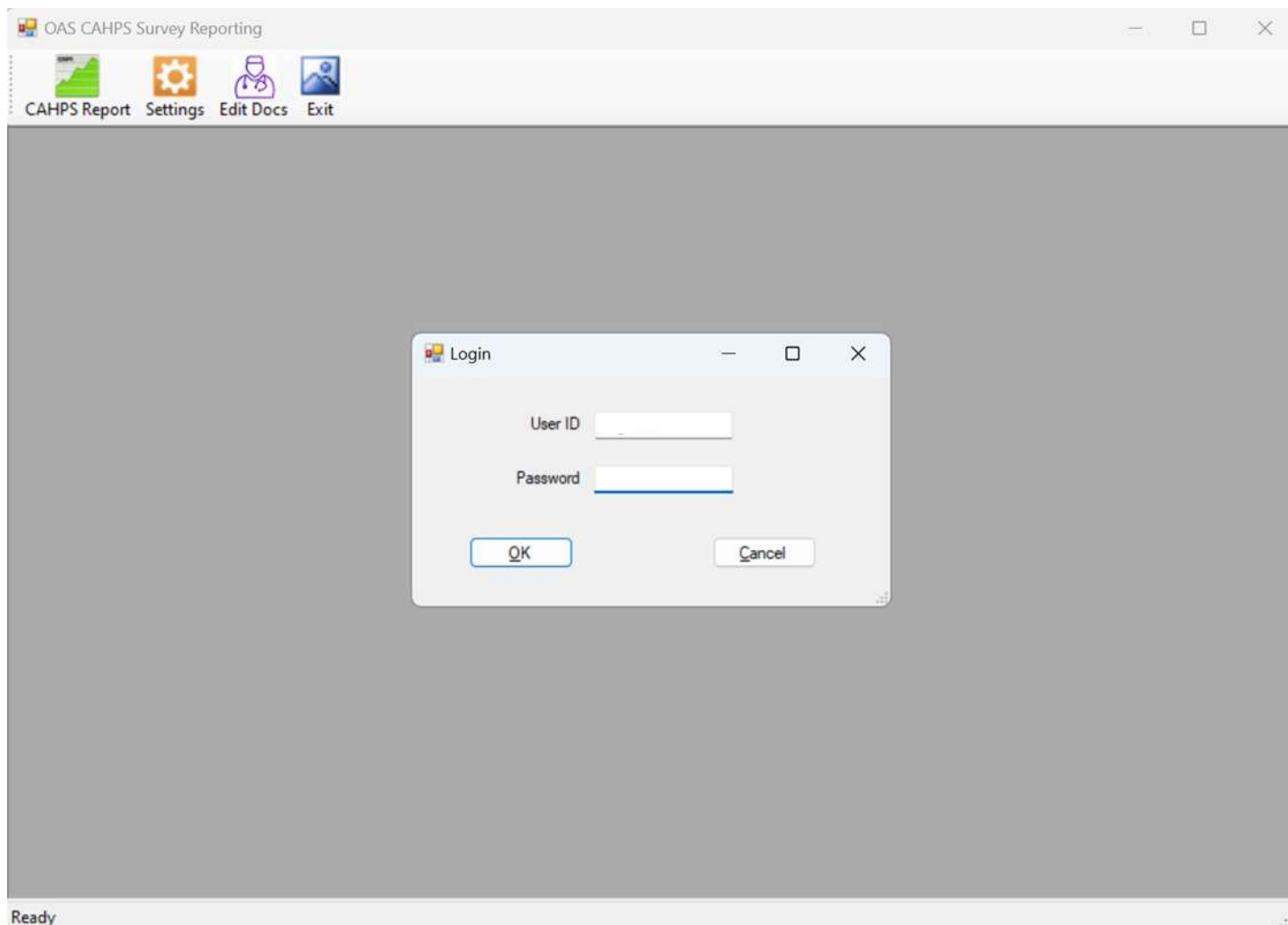
There is a User Agreement form and a HIPAA Security Agreement that must be filled out, signed, scanned, and emailed or mailed back to us in order to set up your account.

Installing the OAS CAHPS Program:

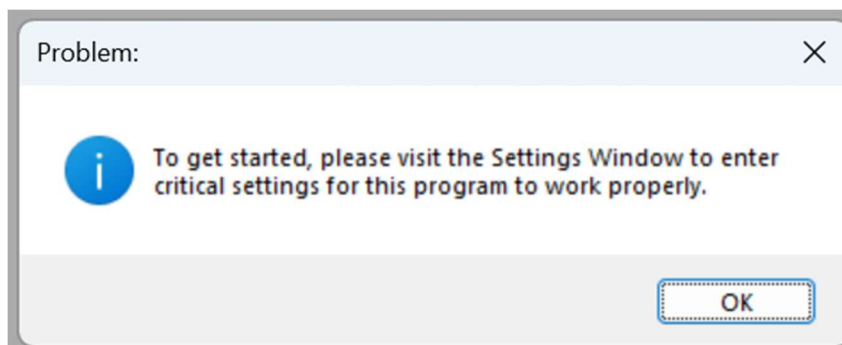
You will be provided with an email containing a hyperlink to download the program along with instructions on how to install it.

Logging into the OAS CAHPS Desktop Program:

Upon double-clicking your desktop program after installation, you should see the following screen: (on the next page)



After logging into the program for the first time, you will see the following message:



The message above is asking you to open the Settings window to enter in all of the information that is needed for the program to operate correctly.

After clicking OK to dismiss this message, click on the “Settings” toolbar button, and you will see the following settings window:

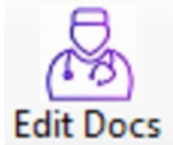


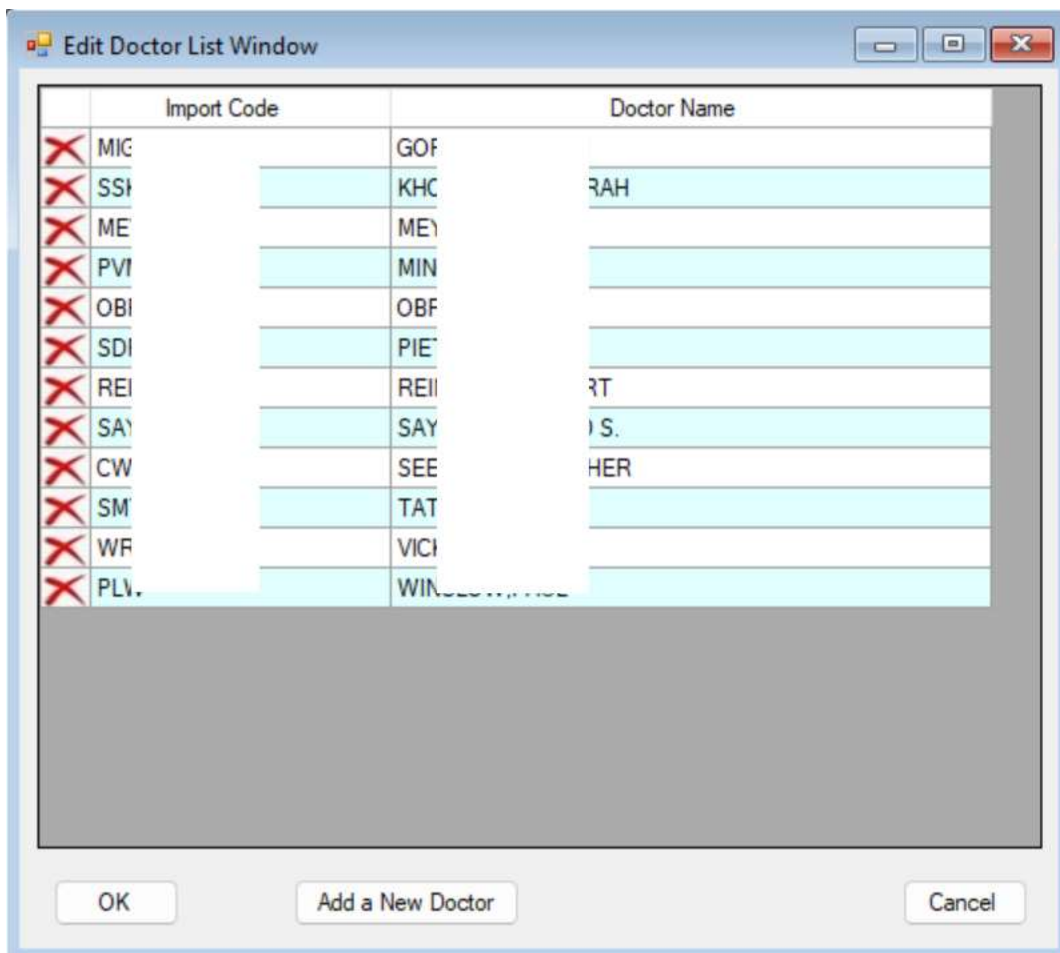
The image shows a 'Settings Window' dialog box with the following fields and controls:

- Facility Name: Text input field
- Survey Vendor Company: Dropdown menu
- Secure FTP Host Address: Text input field
- Secure FTP Upload Folder: Text input field
- Secure FTP UserID: Text input field
- Secure FTP Password: Text input field
- OK button
- Cancel button

You should be provided with the Secure FTP Server information above from your Survey Vendor. Note: You cannot use the OAS CAHPS Report Window until all of the settings above have been properly entered.

Next, you will also need to enter the list of Doctors at your facility. Click on the "Edit Docs" button on the toolbar...





The whole purpose of this window is for you to give a way for the program to convert the Import Code for each doctor that appears in your raw database data into Doctor Names.

The window will initially display an empty grid with no doctors shown. Use the “Add a New Doctor” button to add new doctors and enter the information required.

You are free to format the Doctor Names however you would like for them to appear in the Excel Spreadsheet, such as “Last, First”, “Dr. First Last”, UPPER or Mixed Case, etc.

If you are unsure what to use for the “Import Code” values, please consult us after we have performed your database mapping to discover the codes. Often the EMR/EHR system uses the NPI numbers for the physicians or even sometimes the state license numbers.

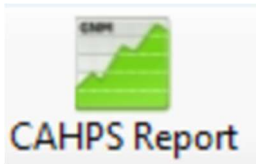
Use the red “X” buttons on the leftmost column to delete doctors.

Don’t forget to click OK when you are all done making changes, or else it will not be saved.

If you do not enter your list of doctors, your generated spreadsheets will show the raw database import codes instead of the doctor’s names, which will prevent the survey company from mentioning the doctor name to remind the patient about the visit they are conducting the survey about.

IV. OAS CAHPS REPORT WINDOW

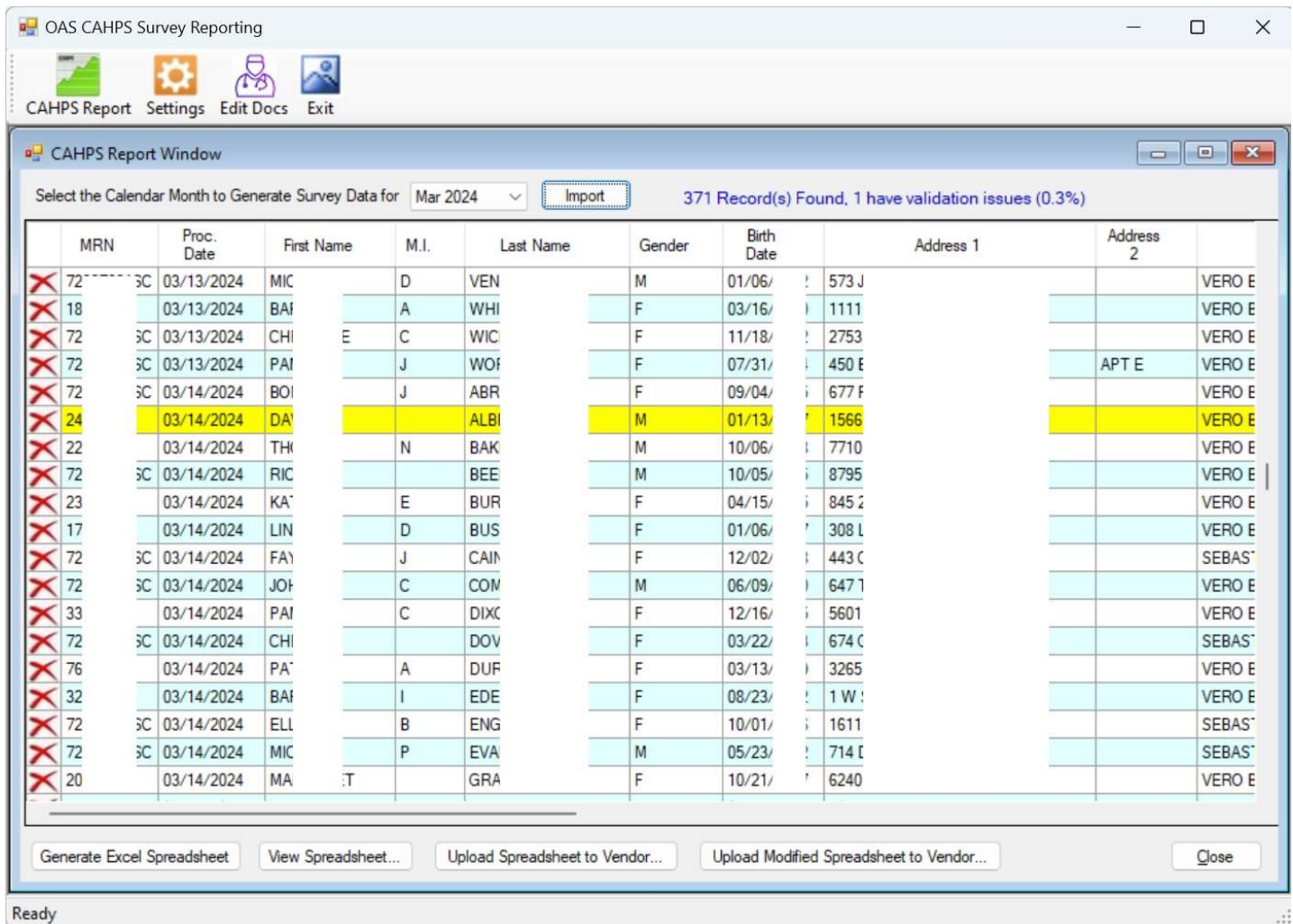
Click on the “CAHPS Report” toolbar button to open the OAS CAHPS Report Window:



The screenshot shows the "CAHPS Report Window" interface. At the top, there is a title bar with the text "CAHPS Report Window" and standard window control buttons (minimize, maximize, close). Below the title bar, there is a section for selecting the calendar month to generate survey data. This section includes a dropdown menu currently set to "Mar 2024" and an "Import" button. Below this selection area is a large table with the following column headers: MRN, Proc. Date, First Name, M.I., Last Name, Gender, Birth Date, Address 1, Address 2, City, State, Zip, and Phone Number. The table area is currently empty. At the bottom of the window, there is a row of buttons: "Generate Excel Spreadsheet", "View Spreadsheet...", "Upload Spreadsheet to Vendor...", "Upload Modified Spreadsheet to Vendor...", and "Close".

Next, select the Month and Year that you would like to generate a survey spreadsheet for. Note that this dropdown will default to the previous Month, as it will assume that you’re logging in sometime shortly after a month has ended to send a spreadsheet to your survey vendor.

Next, click on the “Import” button. You will see a list of patients that were seen in the selected month: (next page)

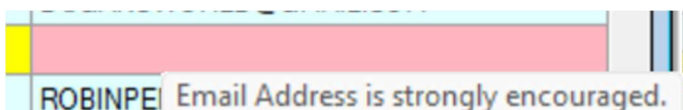


Notice that it provides a summary of the import results in blue next to the “Import” button, telling you the total number of patient visit records as well as how many records have validation issues.

Next, notice that some of the records are highlighted with a yellow background. This is letting you know that one or more fields have failed validation on that row. Each failing field is highlighted with a pink background. You may need to horizontally scroll the grid over to the right in order to see the failing field(s):

State	Zip	Phone Number	Mobile Number	CPT Codes
FL	33756			66761
FL	33756			66761

Also note that if you aren’t sure why the field is failing, you can simply hover your mouse over the pink failing field and it will show you a pop-up message (tooltip) that will offer further information about the validation failure:



Correcting the data is, well, kind of optional... sort of. The big picture here is that the CMS requires that each facility makes a good-faith effort for the survey vendor to conduct surveys for the *eligible* patients. If you are a larger facility treating lots of patients each month, it will be easy for you to provide enough clean survey records to your vendor. If you are a smaller facility, you may have to work a bit harder and correct some records in order to provide your survey vendor enough good survey records for them to successfully conduct enough surveys. Your survey vendor may be able to tell you what their average success rate is so that you can calculate how many of your survey records need to be passing validation before uploading your spreadsheet to them.

In any event, as far as actually correcting the data before uploading your spreadsheet, you have three options as follows:

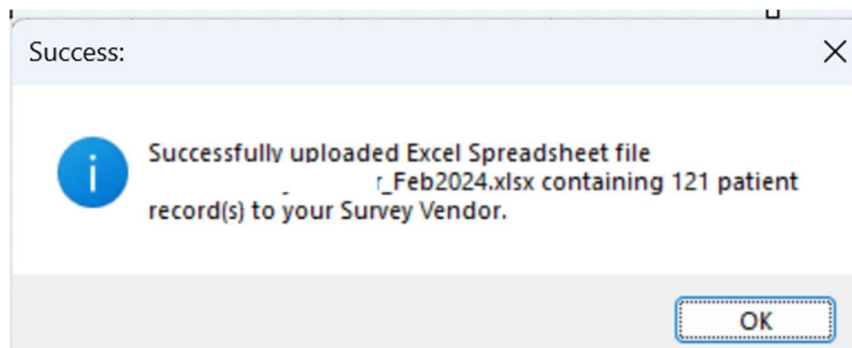
1. Correct the data in your EMR/EHR System.
2. Correct the data in Microsoft Excel.
3. No corrections need to be made. Enough passing records are there already for the survey vendor.

The remaining procedure steps for getting the rest of the job done depends upon which option above you desire, and are outlined in the three sections below.

V. CORRECTING DATA IN YOUR EMR/EHR SYSTEM

Use the following steps for this workflow:

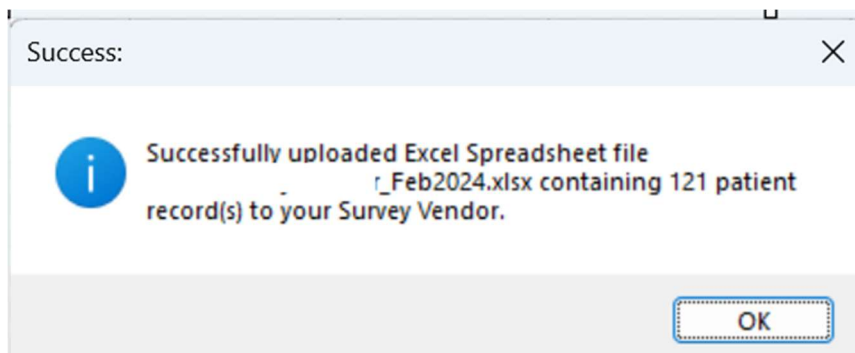
1. Keep the OAS CAHPS Program running with the OAS CAHPS Report Window displaying the yellow/pink validation errors. You can use it as a reference to identify which patient records need to be corrected.
2. Log into your EMR/EHR System and correct as many records as desired.
3. Go back to your OAS CAHPS Report Window and click the "Import" button once again. You should see the validation errors turn white (passing) after corrections.
4. You may need to make several trips back and forth between your EMR/EHR System and the OAS CAHPS Program to get as many records corrected as needed.
5. Click on the button "Generate Excel Spreadsheet" and then click OK to dismiss the success message.
6. OPTIONAL STEP: Click on the "View Spreadsheet" button to review the spreadsheet to make sure everything looks good to you. This will be the exact same information shown in the grid plus a few lines of header information at the top of the spreadsheet.
7. Click on the button "Upload Spreadsheet to Vendor"
8. You should receive a confirmation message after successful Upload to the survey vendor's Secure FTP Server:



VI. CORRECTING THE DATA IN MICROSOFT EXCEL

Use the following steps for this workflow:

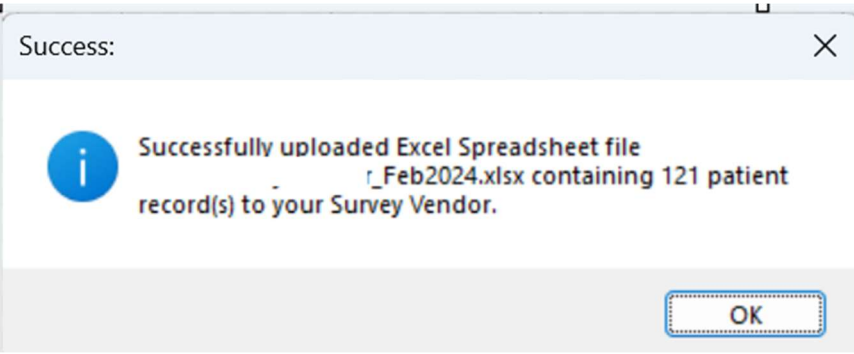
1. Keep the OAS CAHPS Program running with the OAS CAHPS Report Window displaying the yellow/pink validation errors. You can use it as a reference to identify which patient records need to be corrected.
2. Click on the button “Generate Excel Spreadsheet” and then click OK on the success message.
3. Click on the button “View Spreadsheet” to open Excel with the spreadsheet file shown.
4. Make all the corrections as needed in Excel.
5. You may need to make several trips back and forth between Microsoft Excel and the OAS CAHPS Program to get as many records corrected as needed.
6. Save the updated spreadsheet file in Excel either in the same folder (C:\CAHPS_Data) with the same filename, or in an alternate folder location somewhere in your “Documents” folder. This second approach is recommended because if you are not careful and click on “Generate Excel Spreadsheet” after making corrections it will overwrite your spreadsheet file (it will warn you, however). It’s just safer to store the file in a different folder just in case.
7. Close Microsoft Excel.
8. Click on the button “Upload Modified Spreadsheet to Vendor”. This will display a file open dialog box. Browse to the location of your corrected spreadsheet and select your file.
9. You should receive a confirmation message after successful Upload to the survey vendor’s Secure FTP Server:



VII. NO CORRECTIONS NEED TO BE MADE. ENOUGH CORRECT RECORDS PRESENT ALREADY

Use the following steps for this workflow:

1. Click on the button “Generate Excel Spreadsheet”.
2. Click on the button “Upload Spreadsheet to Vendor”.
3. You should receive a confirmation message after successful Upload to the survey vendor’s Secure FTP Server:



End of User's Manual