

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>

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 higher. 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:

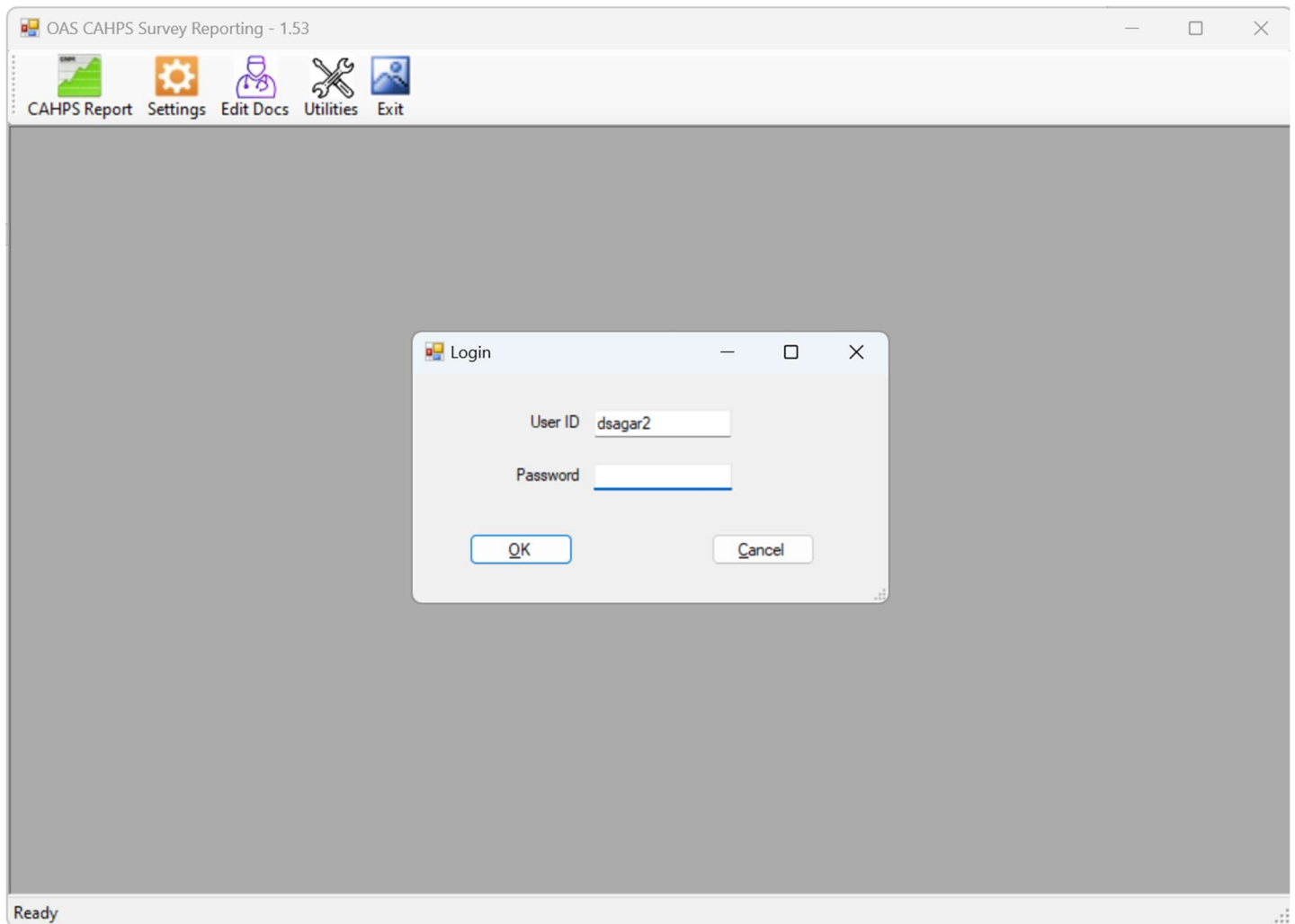
There is a User Agreement form and a HIPAA Security Agreement that must be filled out, signed, scanned, and emailed or mailed back to us in order to set up your account.

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.

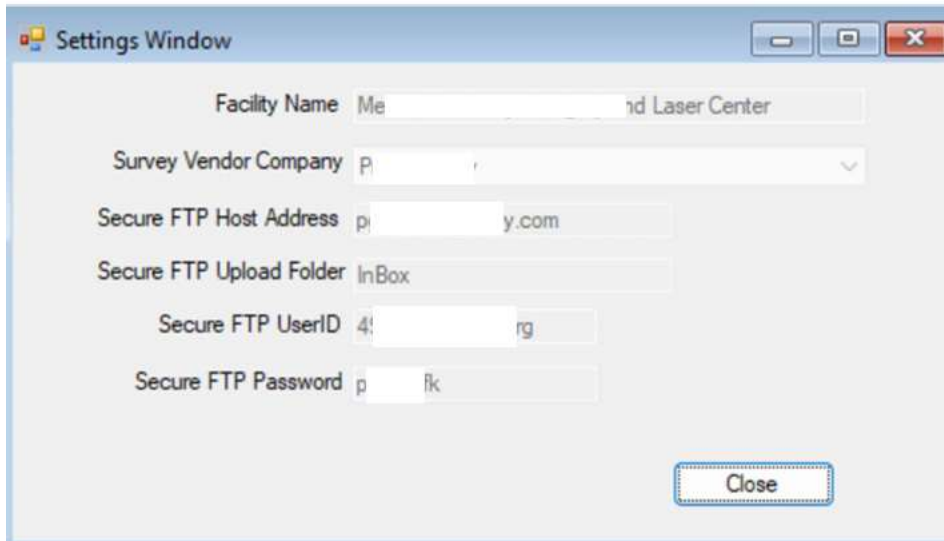
Logging into the OAS CAHPS Desktop Program:

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



The message above is asking you to open the Settings window to confirm all of the information has been entered by Creative Data Technologies 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:



A screenshot of a software window titled "Settings Window". It contains several input fields for configuration: "Facility Name" (text box with "Me" and "nd Laser Center"), "Survey Vendor Company" (dropdown menu), "Secure FTP Host Address" (text box with "p" and "y.com"), "Secure FTP Upload Folder" (text box with "InBox"), "Secure FTP UserID" (text box with "4" and "rg"), and "Secure FTP Password" (text box with "p" and "fk"). A "Close" button is located at the bottom right of the window.

Settings Window

Facility Name Me nd Laser Center

Survey Vendor Company p

Secure FTP Host Address p y.com

Secure FTP Upload Folder InBox

Secure FTP UserID 4 rg

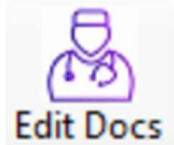
Secure FTP Password p fk

Close

You should be provided with the Secure FTP Server information above from your Survey Vendor. Please provide this information securely to Creative Data Technologies so that we can enter it into your account. You can email us the user ID and text us the password to 850-264-9065.

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...



	Import Code	Doctor Name
X	MIC	GOF
X	SSH	KHC
X	ME	MEY
X	PVI	MIN
X	OBI	OBF
X	SDI	PIE
X	REI	REI
X	SAY	SAY
X	CW	SEE
X	SM	TAT
X	WF	VIC
X	PLV	WIN

OK Add a New Doctor Cancel

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.

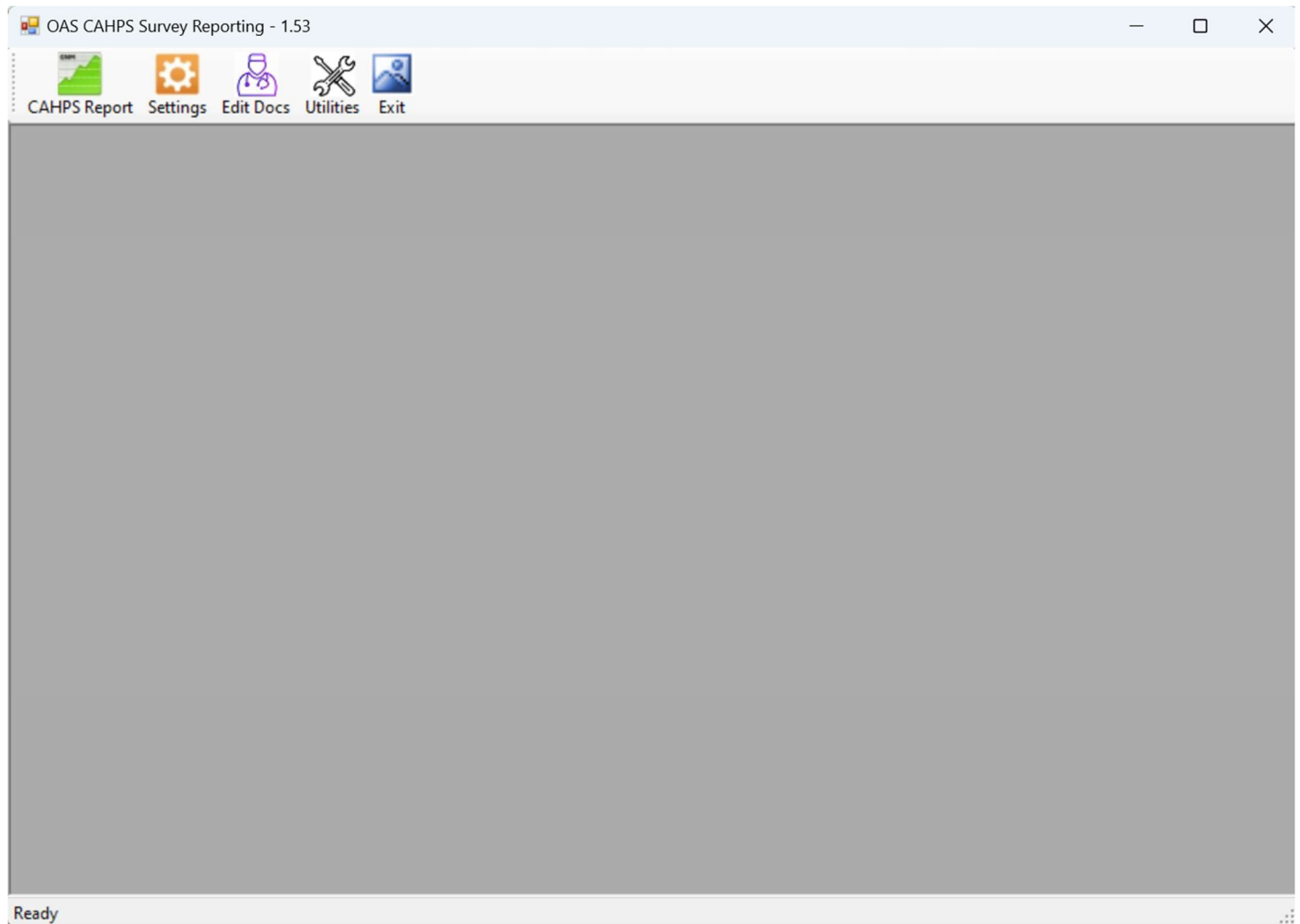
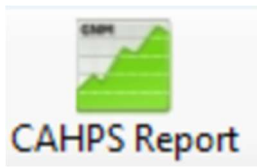
Use the red “X” buttons on the leftmost column to delete doctors.

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:



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)

CAHPS Report Window

Select Month: Jul 2024 Import 100 Record(s) Found, 2 have validation issues (2.0%)

	First Name	Last Name	M.I.	MRN	Proc. Date	Gender	Birth Date	Address 1	Address 2
✖	RIC	JOI	A	519166	07/01/2024	M	05/11/	3458 S	
✖	FR	VA		631524	07/01/2024	M	09/10/	22157	
✖	ARI	WC		630251	07/01/2024	M	12/19/	12992	
✖	CAF	HA	S	591944	07/02/2024	F	11/19/	5509 J	
✖	WA	HE	H	594686	07/02/2024	M	06/11/	1502 S	
✖	JEA	KA		613043	07/02/2024	F	11/15/	103 RC	
✖	CAF	ME	A	561211	07/02/2024	M	10/26/	18750	
✖	ED	CH	Y	631175	07/03/2024	M	05/22/	16125	
✖	CL	MY	E	618589	07/03/2024	M	11/14/	12841	
✖	PAT	SA		631379	07/03/2024	F	12/15/	607 SE	
✖	LEE	AN	P	601846	07/05/2024	F	09/11/	11693	
✖	SUE	DE	A	425011	07/05/2024	F	09/11/	1012 A	
✖	WIL	HA	D	630574	07/05/2024	M	10/06/	9231 T	
✖	DOI	W	M	463071	07/05/2024	F	08/29/	521 SE	
✖	AR	BE	L	435303	07/08/2024	M	10/08/	2029 N	
✖	NA	BR	G	631124	07/08/2024	M	11/17/	6909 E	
✖	JUE	LO	H	627873	07/08/2024	M	07/27/	7820 F	
✖	RIC	MIL	S	216570	07/08/2024	M	03/28/	17700	
✖	WA	HE	H	594686	07/09/2024	M	06/11/	1502 S	

Save Add Record Validate Records Upload Survey Data to Vendor ☒ Test Mode Delete All Records Close

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.

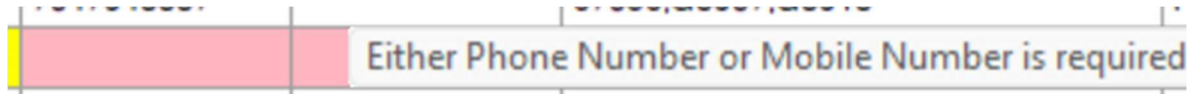
BUTTONS

- **Import** – Use this button to import your data from your EMR/EHR. Depending upon your custom import bridge built, this may directly import your survey data from your EMR/EHR database, or it may prompt you to browse for a spreadsheet to import your data from.
- **Save** – Saves your survey data to the DataVault™ web server. This makes it possible for multiple people at each facility to install the CAHPS Desktop Program and work on the same set of survey records.
- **Add Record** – Adds a new survey record for you to manually enter the information.
- **Validate Records** – Performs validation on all of the survey records present and provides visual feedback (background of failing cells turns pink) along with a validation summary at the top of the window.
- **Upload Survey Data to Vendor** – Generates a data file per the specifications of your Survey Vendor and uploads the data file to their secure FTP server.
- **Test Mode (checkbox)** – Use this checkbox to indicate to your Survey Vendor that you are uploading a Test data file.
- **Delete All Records** – After prompting for confirmation, this will delete all of the records present for the selected month.
- **Close** – Closes the CAHPS Report Window

Next, notice that some of the records may be 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:

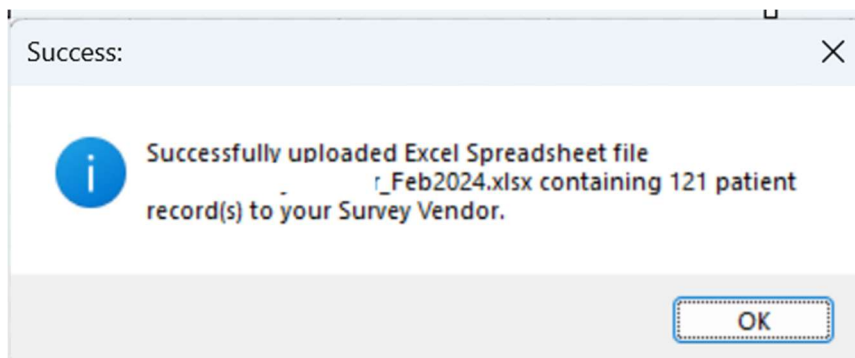
1. Correct the data in your EMR/EHR System.
2. Correct the data in the CAHPS Desktop Program.
3. No corrections need to be made. Enough passing records are there already for the survey vendor.

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:

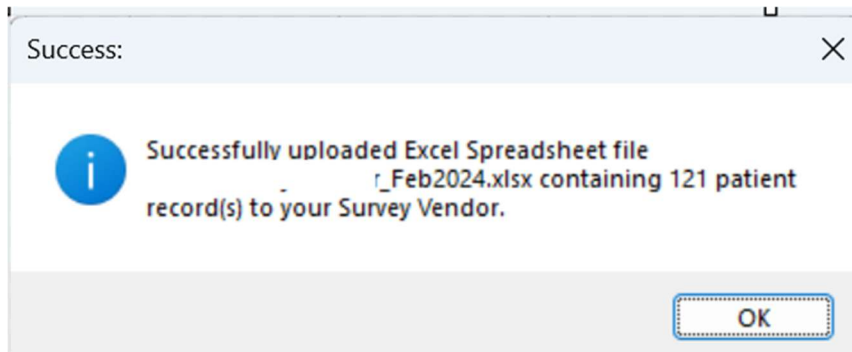
1. Keep the OAS CAHPS Program running with the OAS CAHPS Report Window displaying the yellow/pink validation errors. You can use it as a reference to identify which patient records need to be corrected.
2. Log into your EMR/EHR System and correct as many records as desired.
3. Go back to your OAS CAHPS 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 "Upload Survey Data to Vendor"
6. You should receive a confirmation message after successful Upload to the survey vendor's Secure FTP Server:



VI. CORRECTING DATA USING THE CAHPS DESKTOP PROGRAM

Use the following steps for this workflow:

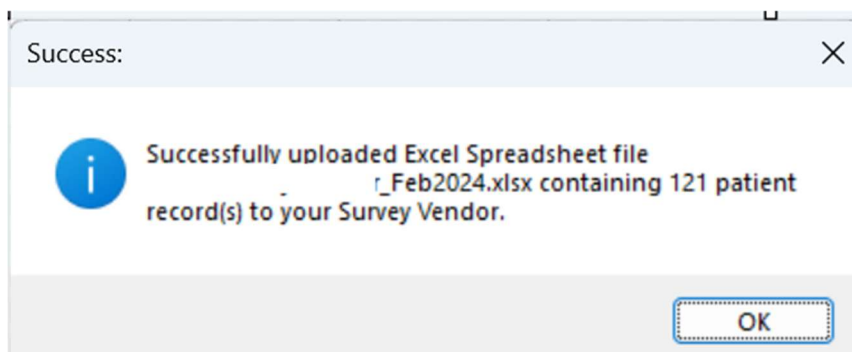
1. Keep the OAS CAHPS Program running with the OAS CAHPS Report Window displaying the yellow/pink validation errors. You can use it as a reference to identify which patient records need to be corrected.
2. Correct any pink failing fields.
3. Click on the button “Validate Records” periodically to verify the corrections.
4. Make all the corrections as needed.
5. Click on the “Save” button to save the corrections to your spreadsheet file.
6. Click on the button “Upload Survey Data to Vendor”.
7. 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

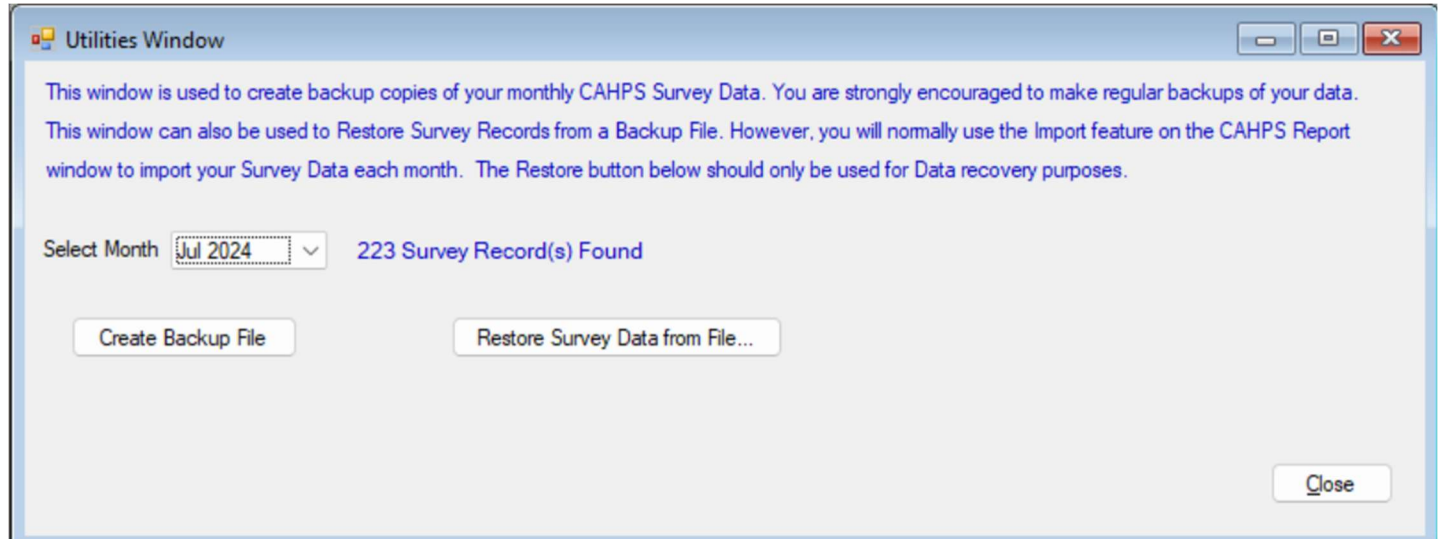
Use the following steps for this workflow:

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



VIII. BACKING UP AND RESTORING SURVEY DATA (UTILITIES WINDOW)

Use the following toolbar button to open the Utilities Window:



You are responsible for making backup copies of your survey data for each month. This will allow you to restore your survey records in the event of data loss or corruption.

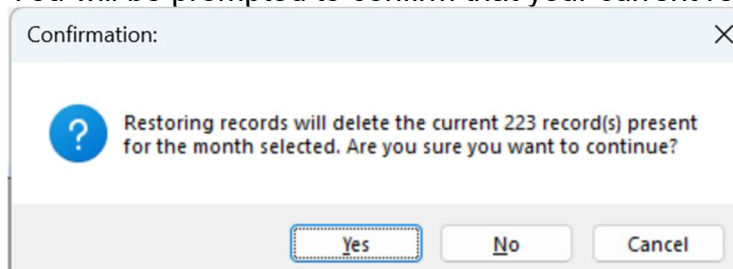
This window can also be used to restore survey records from a backup file. However, you will normally use the Import feature on the CAHPS Report window to import your survey data each month. The Restore button should only be used for data recovery purposes.

Backing up your Survey Data for a Month:

1. Select the Month that you would like to generate a backup file for.
2. You will notice in blue to the right a summary of how many survey records present for the Month you selected.
3. Click the “Create Backup File” button.
4. The program will prompt you to select a destination folder to save the backup file to.
5. After clicking the Save button, the backup file will be saved to the folder you specified.

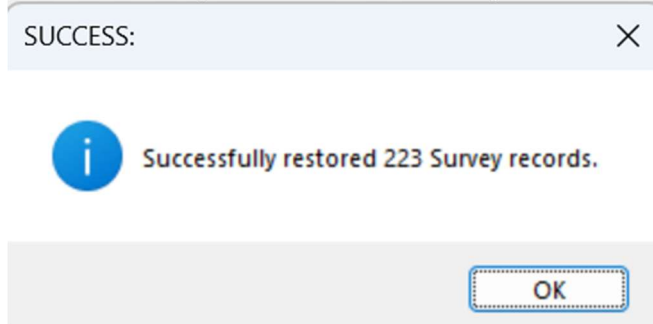
Restoring your Survey Data for a Month:

1. Select the Month that you would like to restore.
2. Click on the “Restore Survey Data from File” button.
3. You will be prompted to confirm that your current records present will be overwritten:



4. Click Yes to continue with the restore process.

5. The program will next prompt you to select the location and filename to restore.
6. After selecting the File and clicking the OK button, your records will be restored.



End of User's Manual