OSHPD 2019 - Relevant Instructions

Relevant has created a number of custom reports to assist with OSHPD 2019 reporting. Many thanks to Brian Fogarty and to Communicare in general for allowing us to test these on their app and for providing very helpful feedback.

Staging / Relevant databases

We used the Relevant database as much as possible in order to leverage data that has already been mapped and to create reports that will work at RCHC member health centers using Nextgen or eCW. However, some reports contain data points that are not already in the Relevant database or are mapped differently, so we had to write some of the reports in Staging. We used Transformer tables wherever possible, but please note that you may have to tweak the names of some of the tables for the reports that rely on Staging - **please email us at support@relevant.healthcare if you have any questions or would like our assistance**.

All reports have Location filters so you can view them based on the location of visits/patients in question.

Definition of an OSHPD Encounter / Matching counts

Because it is important to have a consistent count across tables, we took care to make sure the definition of an encounter is the same in all reports. The default approach is that an OSHPD encounter is one that:
- Is a Visit in Relevant - it shows up in the Visits importer
- Has a claim associated with the visit - it shows up in the Claims importer
- Is a UDS visit - "uds_universe" is TRUE on the Visits importer
- The provider matches one of the OSHPD Provider Categories (line 75-86)

Make sure that the total encounters match exactly on the following reports:
- Encounters by Provider / Contacts by Staff (OSHPD 2019): just encounters, not contacts
- Encounters by Principal Diagnosis and Service

Reports in the Analytics Database

These have one version that works with Nextgen and eCW health centers:

Encounters by Provider / Contacts by Staff (OSHPD 2019)

This report covers the encounter/contact counts for the "CLINIC SERVICES" section on page 4. In order for the report to work properly, you must map providers to the correct OSHPD categories, both in your EHR and in Relevant. The first two tabs display the results for the report, and the last two tabs display any providers with visits in the period who are not mapped, for validation purposes.

Selected Procedures (OSHPD 2019)

This report covers the OSHPD section of the same name. The first tab shows overall numbers, while the second lists the actual codes for validation purposes.

Patient Demographics (OSHPD 2019)

This covers most of the data required for PATIENT DEMOGRAPHICS on "Report Page 3", as well as counts for languages spoken by patients. Please note that the sections for "Patient Coverage" in this report may not adhere to the OSHPD categories. There is a supplemental report below that covers these.

Reports in the Staging Database

These have separate eCW and Nextgen versions.

Encounters by Principal Diagnosis and Service (OSHPD 2019)

This report covers the OSHPD sections of the same name, and should work as-is as long as you have the Transformer-created tables.
Transformers needed:
- relevant_claims
- relevant_visits
- relevant_providers

Patient Coverage and Episodic Programs (OSHPD 2019)

Requires some customization, particularly in the "coverage group" column. Currently the Nextgen version is pending - it's likely this will have to be built custom for each Nextgen health center. Alternatively, Nextgen health centers may calculate totals from the Patient Demographics

This report covers the Patient Coverage and Episodic Programs section of PATIENT DEMOGRAPHICS. This pulls the OSHPD insurance from the "Managed Care Plan ID" field on the "Address" tab for insurance in eCW. Note: you may need to edit the SQL to clean up any NULL values for insurance groups, and/or to change the field names on some Transformer tables.

Transformers needed:
- relevant_visits
- relevant_patients
- relevant_insurance_enrollments
- relevant_payers
- relevant_payer_groups

General instructions

The following steps are required for all health centers, regardless of EHR, in order for the OSHPD reports to work properly. If you have already taken any of these steps, please disregard:

1. Add the following values to the bottom of your "Staff Member Types" Importer, after the line that starts "(45" and before the last line, and add a comma to the end of the "(45" line. Run the Importer to make sure it works:

```
     -- Added for OSHPD
     (79, 'visiting_nurses', 'Visiting Nurses', 'medical'),
     (81, 'registered_dental_hygienists_alt_practice', 'Registered Dental
Hygienists (Alternative Practice)', 'dental'),
     (86, 'other_certified_cpsp_providers', 'Other Certified CPSP
Providers', 'other_professional_services'),
     (90, 'registered_dental_hygienists_not_alt_practice', 'Registered
Dental Hygienists (Not Alternative Practice)', 'dental'),
     (91, 'registered_dental_assistants', 'Registered Dental Assistants',
'dental'),
     (92, 'dental_assistants_not_licensed', 'Dental Assistants - Not
Licensed', 'dental'),
     (93, 'marriage_and_family_therapists', 'Marriage and Family Therapists
(MFT)', 'mental_health'),
     (95, 'licensed_vocational_nurses', 'Licensed Vocational Nurses',
'medical'),
     (96, 'medical_assistants_not_licensesd', 'Medical Assistants - Not
Licensed', 'medical'),
     (101, 'other_providers_not_listed', 'Other Providers Not Listed
Above', 'other_programs_and_services')
```

2. Create a new Transformer (in order above the one that create relevant_providers) called " relevant_oshpd_provider_mapping" (see SQL in appendix)
3. Add the column "staff_member_type_id" to the relevant_providers Transformer (see SQL in appendix)

4. Add "staff_member_id" to the relevant_providers Transformer and Importer (see SQL in appendix)
5. Enable the Importer "Staff Members" (see SQL in Appendix)
6. Enable the Importer "Staff Member FTE" segments (see SQL in Appendix)
7. If you have any custom payers entered, you may have to update the SQL somewhat in the report "Patient Coverage and Episodic Programs" to map those (in the CASE statement)

eCW-specific instructions

1. If you find providers with unmapped provider categories in "Encounters by Provider / Contacts by Staff", you may have to update their record in eCW. Make sure the entry in the field "Social Security No" matches the line number of one of the OSHPD categories.
2. Make sure all insurances have the "Managed Care Plan ID" field on the "Address" tab filled out with one of the values in the "Patient Coverage and Episodic Programs" report's "explanation" section.

Nextgen-specific instructions

You will need to map your providers to the provider types, and your insurances to the insurance categories, listed in the OSHPD guidance. If these categories are not stored directly in Nextgen, this may require providing a list of providers with their OSHPD provider type (Relevant can supply a template for this), and/or doing some

Appendix

relevant_oshpd_provider_mapping (eCW)

```
DROP TABLE IF EXISTS relevant_oshpd_provider_mapping;
CREATE TABLE relevant_oshpd_provider_mapping AS
  SELECT DISTINCT uid                         AS User_ID,
               ulname                         AS Last_Name,
               ufname                         AS First_Name,
               CASE
                  WHEN usertype = 1
                          THEN 'Provider'
                  WHEN usertype = 2
                          THEN 'Staff'
                  WHEN usertype = 9
                          THEN 'Resource'
                  ELSE 'Error' END            AS User_type,
               COALESCE(CASE
                          WHEN usertype = 1
                                  THEN ssn
```

```
                             WHEN usertype = 2
                                     THEN ssn
                             WHEN usertype = 9
                                     THEN providercode
                             ELSE 'error' END, '0') AS oshpd_line
  FROM users
        LEFT JOIN enc ON users.uid = enc.resourceid
        LEFT JOIN doctors ON users.uid = doctors.doctorid
  WHERE (usertype = 1 OR usertype = 2 OR usertype = 9)
    AND encounterid IS NOT NULL
    AND (enctype = 1 OR enctype = 3);
CREATE INDEX oshpd_line_relevant_oshpd_provider_mapping_index
  ON relevant_oshpd_provider_mapping (oshpd_line);
CREATE INDEX User_ID_relevant_oshpd_provider_mapping_index
  ON relevant_oshpd_provider_mapping (User_ID);
```

Adding staff_member_type_id to relevant_providers/ Providers (eCW)

If you haven't already, add the following JOIN:

```
LEFT JOIN relevant_oshpd_provider_mapping oshpd ON oshpd.user_id = users.uid
```

Then, add the following to the SELECT clause (add a comma to the last existing line, and paste this below):

```
CASE
    WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%Family%' THEN 1
    WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%Internal%' THEN 3
                        -- Physicians to Pediatricians
    WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%Pediatrics%' THEN 5
                        -- Physicians to OB/GYN
    WHEN oshpd.oshpd_line = '75' AND s.name ILIKE '%OB%' THEN 4
                        -- Default to General practitioners
    WHEN oshpd.oshpd_line = '75' THEN 2
                        -- PA
    WHEN oshpd.oshpd_line = '76' THEN 9
                        -- FNP
    WHEN oshpd.oshpd_line = '77' THEN 8
                        -- CNM
    WHEN oshpd.oshpd_line = '78' THEN 10
                        -- Dentist
    WHEN oshpd.oshpd_line = '80' THEN 16
                        -- Psychiatrist
    WHEN oshpd.oshpd_line = '82' THEN 20
                        -- Clinical Psychologist
    WHEN oshpd.oshpd_line = '83' THEN 21
                        -- LCSW
    WHEN oshpd.oshpd_line = '84' THEN 22
```

```
                                -- Other Providers Billable to Medi-Cal to Other
Professional Services
    WHEN oshpd.oshpd_line = '85' THEN 26
                                -- RN
    WHEN oshpd.oshpd_line = '94' THEN 11
                        -- Non-Licensed Patient Education Staff to
Patient/Community Education Specialists
    WHEN oshpd.oshpd_line = '97' THEN 32
                        -- Substance Abuse Counselors to Substance Use
Disorder Services
    WHEN oshpd.oshpd_line = '98' THEN 25
                        -- Billing Staff to Fiscal and Billing Staff
    WHEN oshpd.oshpd_line = '99' THEN 42
                        -- Other Administrative Staff to Management and
Support Staff
    WHEN oshpd.oshpd_line = '100' THEN 41
                        -- new categories for OSHPD (see Staff Member Types
Importer)
    WHEN oshpd.oshpd_line IN ('79', '81', '86', '90', '91', '92', '93', '95',
'96', '101')
    THEN oshpd.oshpd_line :: INT
                        -- Default to Other Providers Not Listed Above
    ELSE 101
    END                                    AS staff_member_type_id
```

Finally, add the following line to the end of the SELECT in the section UNIONed below for provider id 999999:

```
101            AS staff_member_type_id
```

Run the Transformer again to make sure it works, and then add the "staff_member_type_id" to the Providers Importer and make sure it runs.

Adding staff_member_id to relevant_providers/ Providers (eCW)

Add this line to the SELECT statement of the relevant_providers Transformer, after "staff_member_type_id":

```
users.uid                              AS staff_member_id
```

Then add it to the Providers importer. Make sure both run.

Staff Members Importer SQL (eCW and Nextgen)

```
SELECT staff_member_id AS id,
       first_name,
       last_name
FROM relevant_providers
```

Staff Member FTE Segments

```sql
SELECT id,
       staff_member_id,
       staff_member_type_id,
       -- change this if you've imported FTEs, segments
       0 :: DECIMAL          AS ftes,
       '2019-01-01' :: DATE AS started_on,
       NULL :: DATE         AS ended_on
FROM relevant_providers
```