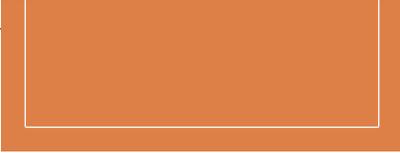


# OSHPD PREPARATION IN RELEVANT FOR HEALTH CENTERS USING ECW

By Ben Fouts, Data Analyst, Redwood Community Health Coalition  
Data Workgroup Webinar, January 12, 2021

# Agenda

1. Introduction to the OSHPD Relevant Reports
2. Staff Categories and Insurance Categories
3. Making Mapping Changes to Relevant



# INTRODUCTION

To OSHPD Report Tables and the Relevant Data Reports

# Download the OSHPD Instructions and Forms

CHHS Open Data

Home > Departments > Office of Statewide Health ... > Primary Care Clinic Annual Utilization Data

Primary Care Clinic Annual Utilization Data

Organization

**OSHPD**  
Office of Statewide Health Planning and Development

Office of Statewide Health Planning & Development

Dataset Topics Activity Stream Showcases

## Primary Care Clinic Annual Utilization Data

### Data and Resources

-  **Individual Reports Search Tool (ALIRTS)** 🔥  
The Automated Licensing Information and Report Tracking System (ALIRTS)...
-  **Data Importing Instructions for Excel** 🔥
-  **2020 Primary Care Clinic Report Form** 🔥 ←
-  **2020 Primary Care Clinic Instructions** 🔥 ←

<https://data.chhs.ca.gov/dataset/primary-care-clinic-annual-utilization-data>

# Changes to the OSHPD 2020 Instructions/Tables

- None
- Therefore, the Relevant reports from last year should work for this year with some updates to the SQL code
- Note that these reports are named with "2019" (you can change the report names when you modify the SQL code for 2020 dates)

# Relevant OSHPD Instructions From Last Year



## 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](mailto: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

- You can follow the instructions again this year and make additional changes suggested in the next slides

-- OR --

- Contact [support@relevant.healthcare](mailto:support@relevant.healthcare) for assistance

- Ben is also available to answer questions

# If the OSHPD Reports Were NOT Set-up Last Year

## 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_cpap_providers', 'Other Certified CPAP
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_licensed', '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.

- Just follow the instruction manual

It gives you step-by-step instructions on:

- Adding Transformers and Importers
- Modifying Transformers

# If You do not Have Them, Copy the Reports From the RCHC Aggregate Instance

## Reports



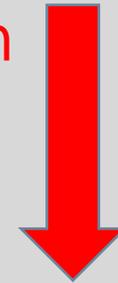
Report Sets ▾  
All

Show:

Name ↕	Owner ↕	Last Edited ↕	Published ↕
Patient Demographics (OSHPD 2019) - Nextgen and eCW	Relevant x Support	2/12/2020	yes
Encounters by Provider / Contacts by Staff (OSHPD 2019) - Nextgen and eCW	Relevant x Support	2/12/2020	yes
Encounters by Principal Diagnosis and Service (OSHPD 2019) - eCW	Relevant x Support	2/12/2020	yes
Patient Coverage and Episodic Programs (OSHPD 2019) - eCW	Relevant x Support	2/12/2020	yes
Selected Procedures (OSHPD 2019) - Nextgen and eCW	Relevant x Support	2/13/2020	yes

# To Copy a Report from the RCHC Aggregate

Click on this icon



## Reports: Patient Demographics (OSHPD 2019) - Nextgen and eCW ⓘ



Copy report definition (for sharing)

### Description

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 that covers these.

### Parameters

#### Location(s)

All

Then, in Your Own Instance of Relevant, Go to the Reports Section...

Reports

Search name, description or SQL

Report Sets  
All

Show: Published Unpublished All

New Report ▾

Blank Report

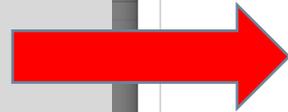
Import Report

Click on New Report  
Choose "Import Report"

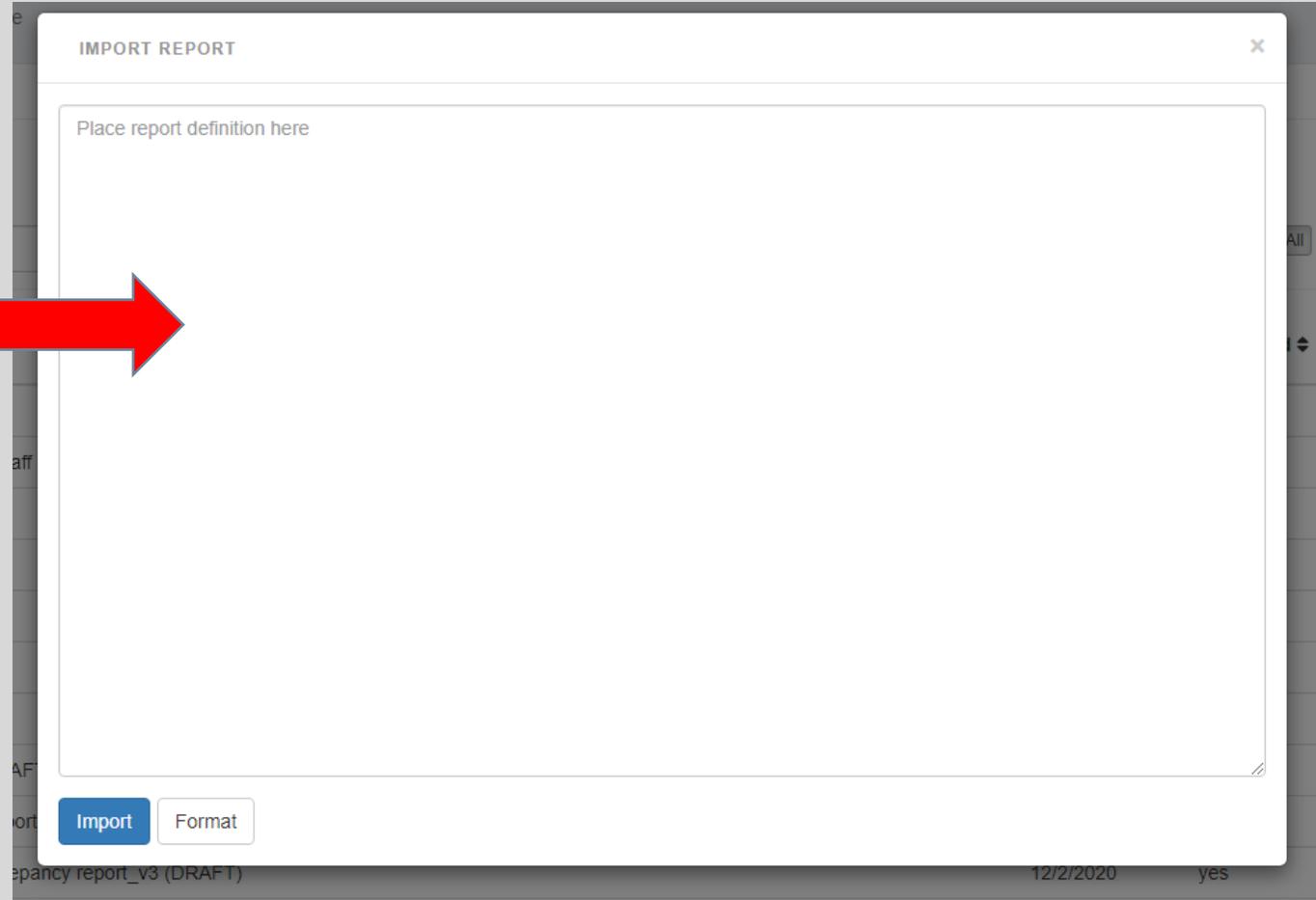
A new screen will pop up

# And Paste (Control-V) Into the Import Report Window

Paste here



Click Import



# Report Page 2

- Relevant Report: "Encounters by Provider / Contacts by Staff (OSHDP 2019)"

**CLINIC SERVICES** ANNUAL UTILIZATION REPORT OF PRIMARY CARE CLINICS – 2020

Report Page 2 (continued) OSHDP FACILITY ID No. \_\_\_\_\_

**FTEs AND ENCOUNTERS BY PRIMARY CARE PROVIDER (do not input any commas)**

Line No.	Primary Care Providers	No. of Salaried FTEs* (1)	No. of Contract FTEs* (2)	No. of Volunteer FTEs* (3)	Total FTEs* (4)	No. of Encounters (5)
75	Physicians					
76	Physician Assistants					
77	Family Nurse Practitioners					
78	Certified Nurse Midwives					
79	Visiting Nurses					
80	Dentists					
81	Registered Dental Hygienists (Alternative Practice)					
82	Psychiatrists					
83	Clinical Psychologists					
84	Licensed Clinical Social Workers (LCSW)					
85	Other Providers Billable to Medi-Cal**					
86	Other Certified CPSP Providers Not Listed Above***					
87	Total					

\* Report FTEs to two decimal places, e.g. 2.25. If less than 1, include leading zero, e.g. 0.25 instead of .25.  
 \*\* Other Providers Billable to Medi-Cal – Included here are Chiropractors, Physical Therapists, Optometrists and any other professionals who are able to be reimbursed through the Medi-Cal program.  
 \*\*\* Comprehensive Perinatal Services Program – List all other professionals not listed above that are certified by the CPSP program to render services and can be reimbursed.

**FTEs AND CONTACTS BY CLINICAL SUPPORT STAFF (do not input any commas)**

Line No.	Clinical Support staff	No. of Salaried FTEs* (1)	No. of Contract FTEs* (2)	No. of Volunteer FTEs* (3)	Total FTEs* (4)	No. of Contacts (5)
90	Registered Dental Hygienists (Not Alternative Practice)					
91	Registered Dental Assistants					
92	Dental Assistants – Not Licensed					
93	Marriage and Family Therapists (MFT)					
94	Registered Nurses					
95	Licensed Vocational Nurses					
96	Medical Assistants – Not Licensed (1)					
97	Non-Licensed Patient Education Staff					
98	Substance Abuse Counselors (2)					
99	Billing Staff (3)					
100	Other Administrative Staff (4)					
101	Other Providers Not Listed Above					
102	Total					

\* Report FTEs to two decimal places, e.g. 2.25. If less than 1, include leading zero, e.g. 0.25 instead of .25.  
 (1) Also includes Certified Medical Assistants.  
 (2) Does not include substance abuse counseling performed by providers listed elsewhere.  
 (3) Staff must spend 80% of time on billing.  
 (4) Includes Executive Directors, CFOs, Medical and Dental Records staff, Medical and Dental Receptionists, and other management staff.

UTILIZATION-PCC (12/3/2020) 4

# Report Page 3

**Report Page 3** OSHPD FACILITY ID No. \_\_\_\_\_

Do not input any commas for the following tables.

RACE		
Line No.	Race	No. of Patients (1)
1	White (include Hispanic)	
2	Black	
3	Native American / Alaskan Native	
4	Asian / Pacific Islander	
5	More Than One Race	
6	Other / Unknown	
7	Total Patients*	

FEDERAL POVERTY LEVEL		
Line No.	Federal Poverty Level	No. of Patients (1)
20	Under 100%	
21	100 – 198%	
22	199 – 200%	
23	201 – 400%	
24	Above 400%	
25	Unknown	
26	Total Patients*	

ETHNICITY		
Line No.	Ethnicity	No. of Patients (1)
10	Hispanic	
11	Non-Hispanic	
12	Unknown	
13	Total Patients*	

AGE CATEGORY			
Line No.	Age Category	Males (1)	Females (2)
30	Under 1 Year		
31	1 – 4 Years		
32	5 – 12 Years		
33	13 – 14 Years		
34	15 – 19 Years		
35	20 – 34 Years		
36	35 – 44 Years		
37	45 – 64 Years		
38	65 and Over		
39	Total Patients*		

SEASONAL AGRICULTURAL AND MIGRATORY WORKERS		
Line No.		Number (1)
75	Total Patients	
76	Total Encounters	

PATIENT COVERAGE		
Line No.	Patient Coverage	No. of Patients (1)
45	Medicare	
46	Medicare – Managed Care	
47	Medi-Cal	
48	Medi-Cal – Managed Care	
49	County Indigent / CMSP / MISP	
50	Private Insurance	
51	Covered California	
52	Alameda Alliance for Health	
53	My Health LA (MHLA)	
54	PACE Program	
55	Self-Pay / Sliding Fee	
56	Free	
57	All Other Payers	
58	Total Patients*	

EPISODIC PROGRAMS		
Line No.	Episodic Programs	No. of Patients (1)
60	BCCCP	
61	CHDP	
62	Family PACT	
63	Other County Programs	
64	Children's Treatment Program	
65	Other Payer – Covered by Grant	
66	Total Episodic Patients (Duplicated)	

CHILD HEALTH AND DISABILITY PREVENTION (CHDP)		
Line No.		Number (1)
70	CHDP Assessments	

\* Totals for these tables must agree

UTILIZATION-PCC (12/3/2020) 5

- Relevant Report: "Patient Demographics (OSHPD 2019)"

# Report Page 3

**PATIENT DEMOGRAPHICS** ANNUAL UTILIZATION REPORT OF PRIMARY CARE CLINICS – 2020

Report Page 3 OSHPD FACILITY ID No. \_\_\_\_\_

Do not input any commas for the following tables.

RACE		
Line No.	Race	No. of Patients (1)
1	White (include Hispanic)	
2	Black	
3	Native American / Alaskan Native	
4	Asian / Pacific Islander	
5	More Than One Race	
6	Other / Unknown	
7	Total Patients*	

FEDERAL POVERTY LEVEL		
Line No.	Federal Poverty Level	No. of Patients (1)
20	Under 100%	
21	100 – 138%	
22	139 – 200%	
23	201 – 400%	
24	Above 400%	
25	Unknown	
26	Total Patients*	

ETHNICITY		
Line No.	Ethnicity	No. of Patients (1)
10	Hispanic	
11	Non-Hispanic	
12	Unknown	
13	Total Patients*	

AGE CATEGORY			
Line No.	Age Category	Males (1)	Females (2)
30	Under 1 Year		
31	1 – 4 Years		
32	5 – 12 Years		
33	13 – 14 Years		
34	15 – 19 Years		
35	20 – 34 Years		
36	35 – 44 Years		
37	45 – 64 Years		
38	65 and Over		
39	Total Patients*		

SEASONAL AGRICULTURAL AND MIGRATORY WORKERS		
Line No.		Number (1)
75	Total Patients	
76	Total Encounters	

PATIENT COVERAGE		
Line No.	Patient Coverage	No. of Patients (1)
45	Medicare	
46	Medicare – Managed Care	
47	Medi-Cal	
48	Medi-Cal – Managed Care	
49	County Indigent / CMSP / MISP	
50	Private Insurance	
51	Covered California	
52	Alameda Alliance for Health	
53	My Health LA (MHLA)	
54	PACE Program	
55	Self-Pay / Sliding Fee	
56	Free	
57	All Other Payers	
58	Total Patients*	

EPISODIC PROGRAMS		
Line No.	Episodic Programs	No. of Patients (1)
60	BCCCP	
61	CHDP	
62	Family PACT	
63	Other County Programs	
64	Children's Treatment Program	
65	Other Payer – Covered by Grant	
66	Total Episodic Patients (Duplicated)	

CHILD HEALTH AND DISABILITY PREVENTION (CHDP)		
Line No.		Number (1)
70	CHDP Assessments	

\* Totals for these tables must agree

UTILIZATION-PCC (12/3/2020) 5

- Relevant Report: "Patient Coverage and Episodic Programs (OSHPD 2019)"

# Report Page 4

## ENCOUNTERS BY PRINCIPAL DIAGNOSIS Report Page 4

ANNUAL UTILIZATION REPORT OF PRIMARY CARE CLINICS – 2020

OSHDP FACILITY ID No. \_\_\_\_\_

Report the diagnosis (or symptom, condition, problem, or complaint) as the main reason for the encounter. Do not report the secondary diagnosis(es). There should be only one principal diagnosis for each encounter.

ENCOUNTERS BY PRINCIPAL DIAGNOSIS (do not input any commas)

Line No.	Classification of Diseases and/or Injuries for each Principal Diagnosis	ICD-10-CM Codes	No. of Encounters (1)
1	Infectious and Parasitic Diseases	A00 - B99	
2	Neoplasms	C00 - D49	
3	Endocrine, Nutritional, and Metabolic Diseases; and Immunity Disorders	E00 - E89	
4	Blood and Blood Forming Disorders	D50 - D89	
5	Mental, Behavioral, and Neurodevelopment Disorders	F01 - F99	
6	Nervous System and Sense Organs Diseases	G00 - H95	
7	Circulatory System Diseases	I00 - I99	
8	Respiratory System Diseases	J00 - J99	
9	Digestive System Diseases, excluding dental diagnoses	K20 - K95	
10	Genitourinary System Diseases	N00 - N99	
11	Pregnancy, Childbirth & the Puerperium	O00 - O9A	
12	Skin and Subcutaneous Tissue Diseases	L00 - L99	
13	Musculoskeletal System and Connective Tissue Diseases	M00 - M99	
14	Congenital Anomalies	Q00 - Q99	
15	Certain Conditions Originating in the Perinatal Period	P00 - P96	
16	Symptoms, Signs, and Ill-defined Conditions	R00 - R99	
17	Injury and Poisoning	S00 - T88	
18	Factors Influencing Health Status and Contact with Health Services	Z00 - Z29, Z40 - Z99	
19	Dental Diagnosis	K00 - K14	
20	Family Planning "Z" Codes	Z30 - Z39	
21	Other	All other codes not in lines 1-20	
22	Total		

- Relevant Report: "Encounters by Principal Diagnosis and Service (OSHDP 2019)"

# Report Page 5

## ENCOUNTERS BY PRINCIPAL SERVICE ANNUAL UTILIZATION REPORT OF PRIMARY CARE CLINICS – 2020

Report Page 5

OSHPD FACILITY ID No. \_\_\_\_\_

Classify each encounter by the principal CPT code that was reported on the billing document for this encounter. Do not report secondary procedures. There should be one and only one procedure code reported for each encounter.

### ENCOUNTERS BY PRINCIPAL SERVICE (do not input any commas)

Line No.	Principal Service	CPT Codes	No. of Encounters (1)
<b>EVALUATION AND MANAGEMENT SERVICES</b>			
1	Evaluation and Management (new patient)	99201 - 99205	
2	Evaluation and Management (established patient)	99211 - 99215	
3	Hospital Related Services	99217 - 99228, 99231 - 99239	
4	Consultations	99241 - 99245, 99444, 99451 - 99453	
5	Other Evaluation and Management Services	99291 - 99292, 99354 - 99360, 99415 - 99418, 99450, 99455 - 99456, 99499	
6	Nursing Facility Related Services	99304 - 99318	
7	Case Management Services	99368 - 99368	
8	Preventive Medicine (infant, child, adolescent)	99381 - 99384, 99391 - 99394, 99460 - 99463	
9	Preventive Medicine (adult)	99385 - 99387, 99395 - 99397, 99420	
10	Counseling	99401 - 99404, 99406 - 99409, 99411 - 99412	
<b>ALL OTHER SERVICES</b>			
11	Anesthesia	00100 - 01999, 99100, 99116, 99135, 99140, 99151 - 99157	
12	Integumentary System	10004 - 19499	
13	Musculoskeletal System	20005 - 29999	
14	Respiratory System	30000 - 32999	
15	Cardiovascular System	33010 - 37799	
16	Hemic and Lymphatic System	38100 - 38999	
17	Mediastinum and Diaphragm System	39000 - 39599	
18	Digestive System	40490 - 49999	
19	Urinary System	50010 - 53899	
20	Male Genital System	54000 - 55899	
21	Intersex Surgery	55970, 55980	
22	Female Genital System	56405 - 58999	
23	Maternal Care and Delivery	59000 - 59899	
24	Endocrine System	60000 - 60999	
25	Nervous System	61000 - 64999	
26	Eye and Ocular Adnexa System	65091 - 68999	
27	Auditory System	69000 - 69979	
28	Radiology	70010 - 79999	
29	Pathology / Laboratory	80047 - 89358, 89398	
30	Medicine - Special Services	90281 - 99091, 99170 - 99199	
31	Family Planning "Z" Codes	"Z" codes	
32	Dental Encounters (CDT codes)	D0100 - D0999	
33	CPT Category III Codes	0042T - 0542T	
34	Other	All other codes not in lines 1-33	
35	Total		

- Relevant Report: "Encounters by Principal Diagnosis and Service (OSHPD 2019)"

# Report Page 5

**SELECTED PROCEDURES** ANNUAL UTILIZATION REPORT OF PRIMARY CARE CLINICS – 2020

Report Page 5 (continued) OSHPD FACILITY ID No. \_\_\_\_\_

Report the number of procedures for each code (or range of codes) regardless of whether it is the principal or secondary procedure code.

SELECTED PROCEDURE CODES (do not input any commas)

Line No.	Selected Procedures	CPT Codes	No. of Procedures (1)
40	Mammogram	77053 - 77067	
45	HIV Testing	80689, 80701 - 80703, 87389 - 87391 88150 - 88153, 88164 - 88167, 88174 - 88175	
50	Pap Smear	11976, 11980, 55250, 55300, 55400, 57170, 58300 - 58301, 58600, 58605, 58611, 58615	
51	Contraceptive Management		
<b>VACCINATIONS</b>			
52	DTap, DTP, Diphtheria and Tetanus	90389, 90696, 90702, 90714 - 90715, 90723	
53	Hemophilus Influenza B (Hib)	90644, 90647 - 90648	
60	Hepatitis A	90632 - 90634, 90636	
61	Hepatitis B	90739 - 90740, 90743 - 90744, 90746 - 90747	
62	HepB and Hib	90749	
63	Influenza Virus Vaccine	90630, 90653, 90662, 90664, 90666 - 90668, 90672 - 90673, 90662, 90685 - 90688, 90756	
64	Measles, Mumps and Rubella (MMR) and Varicella (MMRV)	90707, 90710, 90716	
65	Pneumococcal	90670, 90732	
66	Poliovirus	90713	
67	Varicella	90396, 90716	

UTILIZATION-PCC (12/3/2020) 8

- Relevant Report: "Selected Procedures (OSHPD 2019)"

# Totals For Particular Tables Must Match

**Report Page 3** OSHPD FACILITY ID No. \_\_\_\_\_

Do not input any commas for the following tables.

**RACE**

Line No.	Race	No. of Patients (1)
1	White (include Hispanic)	
2	Black	
3	Native American / Alaskan Native	
4	Asian / Pacific Islander	
5	More Than One Race	
6	Other / Unknown	
7	Total Patients*	

**FEDERAL POVERTY LEVEL**

Line No.	Federal Poverty Level	No. of Patients (1)
20	Under 100%	
21	100 – 138%	
22	139 – 200%	
23	201 – 400%	
24	Above 400%	
25	Unknown	
26	Total Patients*	

**ETHNICITY**

Line No.	Ethnicity	No. of Patients (1)
10	Hispanic	
11	Non-Hispanic	
12	Unknown	
13	Total Patients*	

**AGE CATEGORY**

Line No.	Age Category	Males (1)	Females (2)
30	Under 1 Year		
31	1 – 4 Years		
32	5 – 12 Years		
33	13 – 14 Years		
34	15 – 19 Years		
35	20 – 34 Years		
36	35 – 44 Years		
37	45 – 64 Years		
38	65 and Over		
39	Total Patients*		

**SEASONAL AGRICULTURAL AND MIGRATORY WORKERS**

Line No.	Number (1)
75	Total Patients
76	Total Encounters

**PATIENT COVERAGE**

Line No.	Patient Coverage	No. of Patients (1)
45	Medicare	
46	Medicare – Managed Care	
47	Medi-Cal	
48	Medi-Cal – Managed Care	
49	County Indigent / CMSP / MISP	
50	Private Insurance	
51	Covered California	
52	Alameda Alliance for Health	
53	My Health LA (MHLA)	
54	PACE Program	
55	Self-Pay / Sliding Fee	
56	Free	
57	All Other Payers	
58	Total Patients*	

**EPISODIC PROGRAMS**

Line No.	Episodic Programs	No. of Patients (1)
60	BCCCP	
61	CHDP	
62	Family PACT	
63	Other County Programs	
64	Children's Treatment Program	
65	Other Payer – Covered by Grant	
66	Total Episodic Patients (Duplicated)	

**CHILD HEALTH AND DISABILITY PREVENTION (CHDP)**

Line No.	Number (1)
70	CHDP Assessments

\* Totals for these tables must agree

UTILIZATION-PCC (11/28/18) Report Page 3 5

- Unduplicated Patient "Totals" must equal each other
- Four tables in Report Page 3 (Patient Demographics) must equal each other.





# STAFF CATEGORIES AND INSURANCE CATEGORIES

Assuming you are using the “standard” approach to mapping

# Validation Report: RCHC All List Providers, Resources and Staff

Export to Excel

**Reports: RCHC All List Providers, Resources and Staff** ⓘ

**Description**  
Lists Providers, Resources and Staff associated with visits in the measurement period, along with various details

**Parameters** [Reset to defaults](#)

**MP Start Date**  **MP End Date**

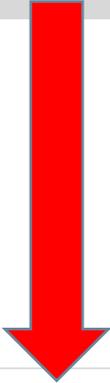
[Refresh](#) Expected run time: 4.97 sec.

Results table +

[Export](#)

Displaying 30 of 93 results

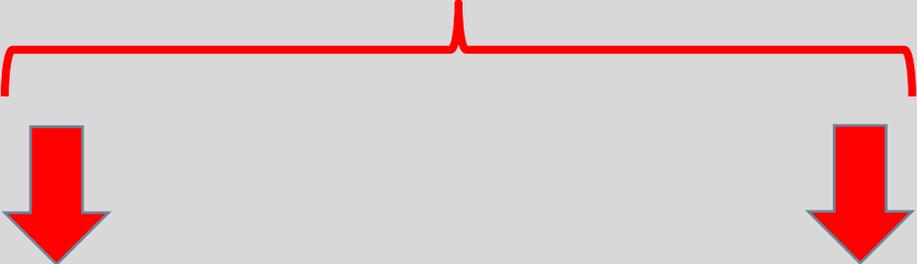
Prov Type	Provider Id	Last Name	First Name	Credentials	Specialty	Is Resident	Primary Facility	Fte	Uds Line Number	Uds Staff Member Type	Uds Major Serv Categ	Oshpd Line Number	Oshpd Staff Member Type	Oshpd Major Serv Categ	Uds Visits
Provider				FNP	Family Medicine	false		0.60	8	Nurse Practitioners	medical	77	Family Nurse Practitioners	Primary Care Provider	1407
Provider				FNP	Family Medicine	false		0.63	8	Nurse Practitioners	medical	77	Family Nurse Practitioners	Primary Care Provider	2582



# How to Use the Staff File

Even though not all UDS and OSHPD staff categories are exactly the same, they should make sense to you for each provider or staff on the list

Verify name, credentials and specialty



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Prov type	Prov La	Fir	Cre	Specialty	Is r	Pri	FT	UDS line	UDS staff member type	UDS maj	Oshpd lin	Oshpd staff member type	
2	Provider	###	Fir	M&LCSW	Behavioral Health	##	VIS	1	22	Licensed Clinical Social Workers	mental_h	84	Licensed Clinical Social Workers (LCSW)	
3	Provider	###	Jo	Tr PhD	Behavioral Health	##	DU	0	21	Licensed Clinical Psychologists	mental_h	83	Clinical Psychologist	
4	Provider	###	Ts	Lir DDS	Dental	##	DE	1	16	Dentists	dental	80	Dentists	
5	Provider	###	N	REDNP	Family Medicine	##	LO	0	8	Nurse Practitioners	medical	77	Family Nurse Practitioners	
6	Provider	###	R	V&MD	Family Medicine	##	VIS	0	1	Family Physicians	medical	75	Physicians	
7	Provider	###	B	ALMD	Family Medicine	##	VIS	0	1	Family Physicians	medical	75	Physicians	

# Staff File: Look for Missing Data

It could be missing from eCW or somehow not mapped (your notes on this will be important in the next steps)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Prov type	Prov	La Fir	Credentials	Specialty	Is r	Pri	FT	UDS line	UDS staff member type	UDS maj	Oshpd lin	Oshpd staff member type	
119	Provider	###			Family Medicine	##	LO	0						
120	Provider	###	Eli Ge	MD		##	VIS	0						
121	Provider	###	JIM D	MD	Family Medicine	##	VIS	0	1	Family Physicians	medical	75	Physicians	

Depending how your staff is mapped to categories in the Transformers, a missing credential or specialty can result in staff member types not mapped for the UDS or OSHPD

# Other Information on the Report (FYI)

N	O	P	Q	R	S	T
Oshpd staff member type	Oshpd m	UDS visits	Non UDS	UDS med visits	Last visit date	Rendering pt count
Licensed Clinical Social Workers (LCSW)	Primary C	737			2020-12-31	
Clinical Psychologist	Primary C	432			2020-12-17	
Dentists	Primary C	2118			2020-12-30	
Family Nurse Practitioners	Primary C	536		536	2020-12-12	47
Physicians	Primary C	763		763	2020-12-24	211
Physicians	Primary C	1227		1227	2020-12-29	339



Visit counts should match with Visit Calendar in Relevant and to visit summaries on the UDS and OSHPD reports

# Validation Report: RCHC List All Insurance

Export to Excel

**Reports: RCHC List All Insurance** ⓘ

**Description**  
Lists insurance names on claims in the measurement period, along with various details

**Parameters**

**MP Start Date**   **MP End Date**

Expected run time: 7.827 sec.

Results table

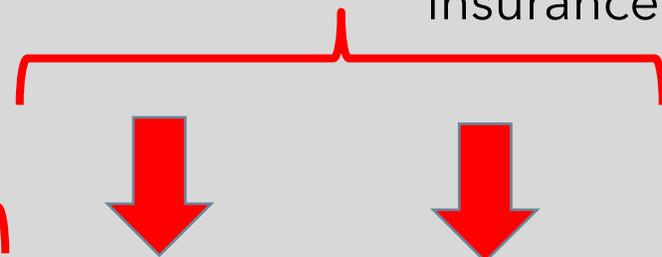
Query Time: 12.039 sec. Displaying 30 of 65 results

Insid	Insurance Name	Healthcenter Ins Group Name	Relevant Payer Groups Name	Uds Insurance Category	Oshpd Insurance Category	Undup Pts Primaryins	Primary On Claim	Secondary On Claim	Tertiary On Claim	Last Service Date
1456	AAA	INSURANCE	OTHER INSURANCE	Private insurance	Private					2020-07-02
1319	AARP	INSURANCE	OTHER INSURANCE	Private insurance	Private					2020-12-11
658	AARP UNITED HEALTH CARE CLAIM	INSURANCE	OTHER INSURANCE	Private insurance	Private					2020-12-31

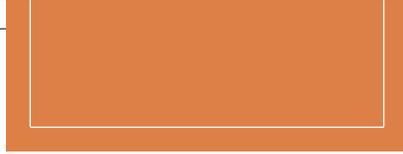
# How to Use the Insurance File

Even though not all UDS and OSHPD insurance categories are exactly the same, they should make sense to you for each insurance name on the list

Verify insurance groups (your own and Relevant's)



C	D	E	F	G	H	I	J	K	L
Healthcenter ins group nam	Relevant payer groups nam	UDS insurance category	Oshpd insurance category	Undup pts primaryins	Primary c	Secondar	Tertiary o	Last service date	
MEDI-CAL	MEDI-CAL	Medicaid	Medi-Cal - Managed Care		16287			2020-12-31	
MEDI-CAL	MEDI-CAL	Medicaid	Medi-Cal - Managed Care		46096			2020-12-31	
INSURANCE	OTHER INSURANCE	Private insurance			3			2020-10-03	
FAMILY PACT	Uninsured	Uninsured	Family PACT	50	3970	2		2020-12-31	
INSURANCE	OTHER INSURANCE	Private insurance	Private	1	11			2020-07-21	
INSURANCE	OTHER INSURANCE	Private insurance	Covered California		2			2020-01-23	
INSURANCE	OTHER INSURANCE	Private insurance	Private		1			2020-12-01	
				23	198			2020-12-29	
CHDP	CHDP	Medicaid	CHDP	2	38			2020-12-08	
CHDP	CHDP	Medicaid	CHDP		10			2020-03-06	
CHDP	CHDP	Medicaid	CHDP	16	136			2020-12-29	
CHDP	CHDP	Medicaid	Medi-Cal		78			2020-12-23	



# MAKING MAPPING CHANGES

In eCW and Relevant

# Master Lists

- The Excel files are your Master Lists of Staff and Insurance Names
- Run them by an expert in the Human Resources or the Finance Department to make sure all categories are correct
- Hint: Highlight in Excel the records not mapped so you know which need to be changed (and which need to be verified later)
- Once you have the Master Lists of staff and insurance, identify where the change needs to occur (eCW vs. Relevant)

## Work in eCW (Helps With UDS Mapping)

- Add credentials or specialty to your providers in eCW if they are missing those fields
- Add insurance group to your insurance name in eCW

# The Common Approach to OSHPD Mapping

- Uses "Dummy" fields in eCW to store OSHPD Table line numbers
- Providers and staff on Report Page 2

FTEs AND ENCOUNTERS BY PRIMARY CARE PROVIDER	
Line No.	Primary Care Providers
75	Physicians
76	Physician Assistants
77	Family Nurse Practitioners
78	Certified Nurse Midwives
79	Visiting Nurses
80	Dentists
81	Registered Dental Hygienists (Alternative Practice)
82	Psychiatrists
83	Clinical Psychologists
84	Licensed Clinical Social Workers (LCSW)
85	Other Providers Billable to Medi-Cal**
86	Other Certified CPSP Providers Not Listed Above***
87	Total

eCW

Personal Info

Last Name \*

Prefix

Teonomy Code

Date of Birth

Mailing Address

Zip Code

Pager

Primary Service Location

First Name \*

Suffix

Specialty

Social Security No.

City

Home Phone

Fax No.

Gender  Male  Female

Middle Initial

Degree/Credentials

Provider Initials

DEA No.

State

Mobile

Print Name

OSHPD Section 2 line no

# The Common Approach to OSHPD Mapping

- Patient Insurance Coverage on **Report Page 6**

REVENUE AND UTILIZATION BY PAYMENT SOURCE		PAYMENT SOURCE								
Line No.		Medicare (1)	Medicare - Managed Care (2)	Medi-Cal (3)	Medi-Cal - Managed Care (4)	County Indigent / CMSP / MISP* (5)	Private Insurance (6)	Covered California (7)	Self-Pay / Sliding Fee (8)	Free (9)

Update Insurance (1516 - AETNA)

Name: AETNA  
Address 1: PO Box 12340  
City: FRESNO  
State: CA  
Zip: 93765  
Tel: 800-238-6299

Managed Care Plan ID: 01

Section 6 Payment Source Column Number

Make sure that insurance numbers under ten are entered with a leading zero, so "01" instead of "1"

# Relevant Tables and Fields with the Data

- Provider and staff mapping: users.ssn
- Resource mapping: users.providercode
- Insurance mapping: insurance.mcaidnyplancode

# Verify the Mapping in the Dummy Fields

- Change as necessary in eCW (see your Master File)
- Note that the provider/staff line numbers changed in 2019, so if you may see unexpected line numbers

# Change the Date Range in Each Relevant Report

- Look for green or red date text that says "2019"
- Change all "2019" to "2020"
  
- In some cases, there is a 2020 date (usually 2020-01-01) referring to the end of the year
- Change all "2020" to "2021"
- Example in the Patient Demographics report

# Relevant: Change the Report Date Range

- Reports: Encounters by Provider / Contacts by Staff (OSHPD 2019)

```
DROP TABLE IF EXISTS temp_staff_segment;  
CREATE TEMP TABLE temp_staff_segment AS  
SELECT DISTINCT ON (staff_member_id) staff_member_id,  
                                     staff_member_type_id  
FROM staff_member_fte_segments  
WHERE started_on <= '2019-12-31' ←  
ORDER BY staff_member_id, started_on DESC;
```

(Near the bottom...)

```
LEFT JOIN temp_staff_segment staff ON staff.staff_member_id = providers.staff_member_id  
WHERE EXTRACT(YEAR FROM visit_date) = 2019 ←
```

# Relevant: Change the Report Date Range

- Report: Encounters by Principal Diagnosis and Service (OSHPD 2019) - eCW

```
DROP TABLE IF EXISTS temp_principal_service;
CREATE TEMP TABLE temp_principal_service AS
SELECT DISTINCT ON (invoiceid) invoiceid,
                    LEFT(code, 5) AS code
FROM edi_inv_cpt
WHERE deleteflag = 0
  -- update with visit defn
  AND EXISTS(
  SELECT
  FROM relevant_claims c
  WHERE EXISTS(SELECT
                FROM relevant_visits
                WHERE uds_universe
                AND EXTRACT(YEAR FROM visit_date) = 2019
```

```
DROP TABLE IF EXISTS temp_principal_dx;
CREATE TEMP TABLE temp_principal_dx AS
SELECT DISTINCT ON (invoiceid) invoiceid,
                    LEFT(code, 3) AS code
FROM edi_inv_diagnosis
WHERE
  -- update with visit defn
  EXISTS(
  SELECT
  FROM relevant_claims c
  WHERE EXISTS(SELECT
                FROM relevant_visits
                WHERE uds_universe
                AND EXTRACT(YEAR FROM visit_date) = 2019
```

(Near the bottom...)

```
FROM relevant_claims c
  INNER JOIN relevant_visits v ON v.id = c.visit_id
  INNER JOIN relevant_providers prov ON prov.id = v.provider_id
  LEFT JOIN temp_principal_dx inv_dx ON inv_dx.invoiceid = c.id
  LEFT JOIN temp_principal_service principal_service ON principal_service.invoiceid = c.id
WHERE EXISTS(SELECT
              FROM relevant_visits
              WHERE uds_universe
              AND EXTRACT(YEAR FROM visit_date) = 2019
              AND id = c.visit_id)
```

# Relevant: Change the Report Date Range

- Report: Selected Procedures (OSHPD 2019) - Nextgen and eCW

```
DROP TABLE IF EXISTS temp_staff_segment;
CREATE TEMPORARY TABLE temp_staff_segment AS
SELECT DISTINCT ON (staff_member_id) staff_member_id,
                                staff_member_type_id
FROM staff_member_fte_segments
WHERE started_on <= '2019-12-31'
ORDER BY staff_member_id, started_on DESC;
CREATE INDEX index_temp_staff_segment_on_staff_member_id ON temp_staff_segment (staff_member_id);

DROP TABLE IF EXISTS temp_staff_segment;
CREATE TEMP TABLE temp_staff_segment AS
SELECT DISTINCT ON (staff_member_id) staff_member_id,
                                staff_member_type_id
FROM staff_member_fte_segments
WHERE started_on <= '2019-12-31'
ORDER BY staff_member_id, started_on DESC;
CREATE INDEX index_temp_staff_segment_on_staff_member_id ON temp_staff_segment (staff_member_id);
-- Results Query --
```

(Near the bottom...)

```
WHERE visits.udc universe
AND EXTRACT(YEAR FROM visit_date) = 2019
AND LENGTH(bc.code) >= 5
```

# Relevant: Change the Report Date Range

- Reports: Patient Demographics (OSHPD 2019) - Nextgen and eCW  
(Contains the most changes)

```
DROP TABLE IF EXISTS temp_staff_segment;
CREATE TEMP TABLE temp_staff_segment AS
SELECT DISTINCT ON (staff_member_id) staff_member_id,
                                staff_member_type_id
FROM staff_member_fte_segments
WHERE started_on <= '2019-12-31'
ORDER BY staff_member_id, started_on DESC;
CREATE INDEX index_temp_staff_segment_on_staff_member_id ON temp_staff_segment (staff_member_id);

DROP TABLE IF EXISTS temp_visit_count;
CREATE TEMP TABLE temp_visit_count AS
SELECT visits.patient_id,
       COUNT(*) AS visits
FROM visits
INNER JOIN providers ON providers.id = visits.provider_id
INNER JOIN temp_staff_segment staff ON staff.staff_member_id = providers.staff_member_id
WHERE visits.udc_universe
AND EXTRACT(YEAR FROM visits.visit_date) = 2019
AND EXISTS(SELECT FROM claims WHERE visit_id = visits.id)
```

# Relevant: Change the Report Date Range

- Reports: Patient Demographics (OSHPD 2019) - Nextgen and eCW

```
-- patients who are seasonal agricultural or migrant workers
DROP TABLE IF EXISTS temp_seasonal_migrant;
CREATE TEMP TABLE temp_seasonal_migrant AS
SELECT DISTINCT patient_id
FROM agriculture_work_cases
WHERE (
  started_on,
  COALESCE(ended_on + 1, '2020-01-01' :: DATE)
) OVERLAPS (
  '2019-01-01' :: DATE,
  '2020-01-01' :: DATE
);
```



```
-- Last patient income level captured in the year
DROP TABLE IF EXISTS temp_fpl;
CREATE TEMP TABLE temp_fpl AS
SELECT DISTINCT ON (patient_id) patient_id,
  poverty_level_percent
FROM patient_annual_poverty_levels
WHERE EXTRACT(YEAR FROM recorded_on) = 2019
ORDER BY patient_id,
```



```
EXTRACT(YEAR FROM AGE('2019-06-30' :: DATE, patients.date_of_birth)) AS age,
CASE
  WHEN EXTRACT(YEAR FROM AGE('2019-06-30' :: DATE, patients.date_of_birth)) < 1 THEN '30. Under 1 Year'
  WHEN EXTRACT(YEAR FROM AGE('2019-06-30' :: DATE, patients.date_of_birth)) BETWEEN 1 AND 4
  THEN '31. 1 - 4 Years'
```

```
LEFT JOIN insurance_enrollments
  ON insurance_enrollments.patient_id = patients.id AND insurance_enrollments.year = 2019
LEFT JOIN payers ON payers.id = insurance_enrollments.payer_id
```



# Relevant: Change the Report Date Range

- Report: Patient Coverage and Episodic Programs (OSHPD 2019) - eCW  
(Near the bottom...)

```
LEFT JOIN relevant_payer_groups vpg ON vpg.id = visit_payer.payer_group_key
LEFT JOIN explanation_visit_explanation ON visit_explanation.oshpd_line = visit_ins.mcaidnyplancode
--LEFT JOIN relevant_payer_groups_coverage_group ON coverage_group.id = coverage_payer.payer_group_key
WHERE visits.udc_universe
AND EXTRACT(YEAR FROM visits.visit_date) = 2019
AND EXISTS(
  SELECT FROM relevant_claims WHERE visit_id = visits.id
```



# Important Transformers and Importers

## STAFF

- Transformer: relevant\_oshpd\_provider\_mapping. For individual staff members, displays the assigned OSHPD line number
- Transformer: relevant\_providers. For individual staff members, defines a Staff Member Type ID (field: staff\_member\_type\_id)
- Importer: Staff Member Types. Generally defines line staff category names for UDS and OSHPD

## INSURANCE

- Insurance mapping only appears in the report "Patient Coverage and Episodic Programs (OSHPD 2019) - eCW"

Questions?