<u>Instructions for Final Review of Your 2016 eHIVQUAL Data</u>

IMPORTANT: Before you submit your review, please run through these data validation steps. If you are submitting data for more than one clinic, <u>they should be repeated for each clinic.</u> Please note that these instructions supplement (and do not replace) our general guidance regarding data validation as outlined in the eHIVQUAL User's Guide.

1) After logging into eHIVQUAL, click on Reviews on the top left corner of the page, which will bring you to a list of your 2016 reviews. For each program whose data you are validating, click on the calendar year 2016 dates (in the Define/Submit Reviews column), which will bring you to the page where you entered your caseload information:

Import Data from XML File   Import Data from Excel File

| Review Dates and Indicators | Submit Review Data |

Review Detail

Review ID: 810971631
Organization Name: **CGW Import Test - Do Not Delete (NY)**

Organizational Caseload Data

Review Start: 01/01/16 (mm/dd/yy)
Review End: 12/31/16 (mm/dd/yy)
STI Sampling: Include All Active Patients ▼

A. Enter the number of patients in your open caseload for this organization (includes HIV+ patients of any age seen for any clinical service during the review period)   20

B. How many of these patients were enrolled in your HIV program as of the end of the review period?   10

Review Remark:

Required Indicators
Patient Profile
HIV Monitoring
STI Testing

[Update]   [Sample]   [Cancel]

2) **Make sure that the answers to questions A and B appear to be accurate representations of your clinical caseload.** The numbers here should match the number of patients you have reviewed and, in most cases, should match or closely approximate the numbers for open and active patients in your organizational cascade submission (if broken out by sites). Make corrections if needed, clicking on Update when you are done, or simply click on Cancel if the information is accurate. <u>If there are significant discrepancies, please contact the AIDS Institute at qocreviews@health.ny.gov for further guidance before submitting.</u>

3) Click on Report List in the top left corner of the web page to arrive at this screen:

4) Leave the default setting for the Sample field, "All Patients," and the review period (1/1/2016 – 12/31/2016). If you have more than one clinic, choose "Selected Programs" under Sites and click on the name of the site(s) that you are currently reviewing.
5) In the Category field, select "(g) Administrative Reports." The list of reports available in the Report field will update accordingly. For the moment, leave the default report (Consolidated Validation Report) selected.
6) Click on the Report button. After a few seconds, you will see a summary of data pulled from other, more-detailed validation reports:

HIV Quality of Care Program
Consolidated Validation Report

Review Period: 1/1/2016 - 12/31/2016
All Patients
Program: Multiple Programs
Housing: ALL

Age: ALL
Gender: ALL
Insurance: ALL
Language: ALL

CD4: ALL
Diagnosis Status: ALL
On ARV: All Inclusive
State: ALL

VL: ALL
Inpatient Only: ALL
Seen in ED Only: ALL
Funding: ALL

Race: ALL
Risk: ALL
Immigration: ALL
Facility: ALL

SUMMARY		4 Programs:	545	40	9	0	0	0	0	2	0	0	61	68	68
				Demo.			Patient Profile					VL		STI	
				(i)	(ii)	(iii)	(iv)	(v)	(vi)	(vii)	(viii)	(ix)	(x)	(xi)	(xii)
Program Name / Submission Status (U/S/A)	ST	Total Patients	Demo.	Exp.	Inc.	Ongoing Care	ED/IP	ARV Therapy	Insurance	Housing	VL Supp.	Syphilis	Chlamydia	Gonorrhea	
Your Clinic #1	NY	136	4	1	0	0	0	0	2	0	0	61	61	61
Your Clinic #2	NY	255	0	0	0	0	0	0	0	0	0	0	0	0
Your Clinic #3	NY	84	7	0	0	0	0	0	0	0	0	0	0	0
Your Clinic #4	NY	70	29	8	0	0	0	0	0	0	0	0	7	7

(i) "Demo.": Patients missing/incorrect info about care status, diagnosis date, sex, race, or risk
(ii) "Exp": Patients missing info regarding death during the review period
(iii) "Inc.": Patients missing info about incarceration during the review period
(iv) "Ongoing Care": Patients missing info about care at another facility/location
(v) "ED/IP": Patients missing info about inpatient-only or ED-only status
(vi) "ARV Therapy": Patients missing info regarding ARV therapy status
(vii) "Insurance": Patients without an entry for payor
(viii) "Housing": Patients wihtout an entry for housing status
(ix) "VL Supp.": Patients missing info regarding VL suppression status
(x) "Syphilis": Patients missing info regarding syphilis screening/treatment
(xi) "Chlamydia": Patients missing info regarding Chlamydia screening/treatment
(xii) "Gonorrhea": Patients missing info regarding gonorrhea screening/treatment

NOTE: "Missing" lab data (items ii and iii) may represent patients who indeed did not receive a CD4 and/or VL during the review period. However, you are encouraged to review this. All other items will require changes. In all cases, clicking on the links (numbers in blue font) will bring you to the corresponding validation report. The overall status is reflected in the font used for Total Patients column: red = definite problem; yellow = possible problem; green = all clear.

7) For each clinic, the number patients in the review is specified using "traffic light" color coding: if the number appears in green font, no problems were detected; if red, there's a problem that requires your attention.

8) For any of the cells with a non-zero number of cases, the number will turn into a hyperlink if you float your cursor over it; clicking on the link will bring you to the applicable underlying data validation report. Save a copy of this report by selecting Excel as the format (to the immediate left of "Export" on the top of the page) and clicking on Export. Select a convenient location to save the file, changing the name if desired.

9) Click on the "back arrow" for your browser (everything but Internet Explorer) or the original browser tab (Internet Explorer) to return to the consolidated report. Continue to identify problems and save copies of reports in this fashion for all of your clinics.

10) Review all of the data validation reports. Entries of "**" mean that data for the corresponding indicator were not entered for this patient. Other values highlighted in red, such as "Unknown" responses for the Race and Risk fields among active patients (where this information is expected), represent additional updates that are required. However, any "?" entries are just cautions that you may want to double-check the data (e.g., missing information regarding patient mortality among patients where other responses suggest the patients were still alive).

11) Return to the respective reviews wherever missing data are seen and update the specified fields.

12) **Carefully review the data for problems besides missing data that may have occurred.** Here are some suggestions:
   a. Run all of the reports in the HIVQUAL Dashboards category and see if the numbers look reasonable.
   b. Adjust the value in the Sample field and repeat (a) for just the active patients and then just the inactive patients.
   c. Change the value in the Sample field to "Inactive – Deceased" and then "Inactive – Unknown Status" and check whether the total number of patients seems correct.
   d. Run all of the reports in the Sexually Transmitted Infections category and see if your treatment rates among patients with positive screens are about what you would expect.
   e. Run all of the reports in the Patients Not Receiving Care category and spot check the patients in each category for anyone who may actually have received the specified care. If discrepancies are noted, review for possible systematic errors that would have affected other patients.
   f. In the Administrative Reports category, run each of the detailed data validation reports directly and spot check the data for possible errors when the data were queried for import or transcribed by data entry staff.

13) When all data entry/import errors have been addressed, review or rerun the dashboard reports from a quality improvement perspective. In addition to adjusting the Sample field, you can run the first two of these reports against specific other specific subpopulations by using the various filters such as Gender, Age, Race, Risk, etc. Make a note of any areas where the results suggest an opportunity for improvement. You can combine this with insights you obtained when creating organizational cascades.

14) You're ready to submit! Return to Reviews, select the reviews one by one (using the link under "Define/Submit Reviews") and submit them by clicking on the Submit Review Data tab, changing the answer to "Ready to Submit?" from "No" to "Yes" and the clicking on the Update button. Please note that this step will also require that you have information from your medical director to answer the following questions:
   a. "After reviewing your eHIVQUAL data reports what are your key findings?"
   b. "What actions does your program plan to implement in response to these findings?"

NOTE: If you have any questions about this process or encounter any problems using the website, please contact Chris Wells at qocreviews@health.ny.gov.