NEW YORK STATE DEPARTMENT OF HEALTH
AIDS INSTITUTE

eHIVQUAL
QUALITY OF CARE
USERS' GUIDE*

* For use with eHIVQUAL, an electronic web-based program for quality of care data collection and review

REVIEW PERIOD(S):
CALENDAR YEAR 2016 (1/1/2016 – 12/31/2016)

PREFACE

This document outlines the use of the eHIVQUAL application to submit clinical indicator data to the New York State Department of Health AIDS Institute. The set of indicators remains focused on work related to the Ending the Epidemic initiatives. Definitions for each indicator have been included in a separate reference document available within the Reference Materials section at www.ehivqual.org, the sign-in page for the use of eHIVQUAL.

The core functionality and design of eHIVQUAL are similar to the version of the application used for the prior reviews. However, **the scope of the review has expanded to include HIV+ patients seen for any service at your organization, either within or outside the HIV care program, regardless of age. We also now require submission of all eligible patients, not a sample**. An optional sampling process is available within the application, though, for random selection of patients on whom to report STI indicator data. The reports within the application provide options for filtering by patient care status, particularly "active" (enrolled in your HIV program as of the end of the review period) patients versus "non-active" patients (all others, with further breakdowns). As in the past, reports can still be filtered by several other demographic parameters. Additional details about patient eligibility and sampling are documented in this guide, the eHIVQUAL Indicator Definitions document, and our Sampling Methodology document, which is also available under Reference Materials at www.ehivqual.org.

We continue to support options for importing data and encourage your doing so. Whether you use the XML or Excel format, please note that data for each of your reviews (if you have more than one site of care) need to be entered through a separate import process. This should be done after specifying the review parameters for that review (review dates and patient caseload) **but before keying in any additional data** (which can be done after the data import for that review).

We continue to work closely with Azara Healthcare and CHCANYS to develop an extract that will automatically transfer data to the eHIVQUAL system for incorporation into the statewide data report. Therefore, all FQHCs participating in the CHCANYS-supported CPCI/Azara DRVS Reporting Platform will not be required to manually submit data this year. However, these centers may need to provide additional information related to patient care status (active v. inactive, etc.) and are encouraged to use the reporting features within eHIVQUAL to review and analyze their performance.

Contact Us
To schedule a phone call for application or indicator guidance, please contact our office at qocreviews@health.state.ny.us.

HOW TO USE THE APPLICATION - OVERVIEW

The eHIVQUAL application is designed to capture data and generate reports that enable the health care provider to assess the quality of care provided to HIV/AIDS patients. The key steps in this process are:

1. Create the necessary review profile(s): For each site/organization where HIV care is provided, specify the name of the organization (from a pre-populated list), review period dates, and caseload numbers (total patients and how many were enrolled in your HIV program)—this is done **every time** a new quality review is conducted. You will also be asked to specify whether your will submit STI indicator data for all eligible patients or a random sample.

   NOTE: All reviews for submission to the AIDS Institute must be entered as January 1st through December 31st of the year being reviewed.

   NOTE: If you are able to import data, steps 2, 3 and/or 4 may not apply, depending on which data elements you are able to import. See the eHIVQUAL Data Import Guide for additional details.

2. Enter patients for review: In eHIVQUAL, populate each site/organization with the required patient identifying information (name, DOB, etc.; the particulars will vary by HIV care status). Patients that were entered for prior reviews in eHIVQUAL do not need to be reentered.

   NOTE: You will not be able to proceed to the next step until (i) the number of active patients entered matches the number specified in step 1 and (ii) the total number of patients entered (from the current or prior reviews) equals or exceeds the number you specified in step 1.

3. Select patients into the review profile(s): For each organization, go to the "Select Sample" page. All active patients will be automatically selected into the review for you. However, you still need to specify which non-active patients belong in the review (some may be holdovers from previous reviews). Place a check mark to the left of all patients who are to be part of the current review, and then click on the single right-pointing arrow to move them from "Available Patients" to "Selected Patients."

   NOTE: If you have chosen to submit STI data on a sample of your active patients, the randomly selected patients will be displayed in red font.

4. Enter review data for the selected patients including: the "patient profile" (questions related to ARV status, housing stability, insurance, etc.); viral load status on final VL of the year; and STI indicator data, including information about medications provided for treated patients.

5. Validate and correct data entry as needed based on review of reports (see the Ensuring Data Accuracy section of this document for details).

6. Submit data – First see the "Final Steps before Submitting Data" guide. Then, at the "Review Details" page, select the "Submit Review Data" tab. Confirm that the submission is complete. It will be reviewed by the AIDS Institute, and within the next few days you will receive an e-mail confirmation or additional guidance.

   NOTE: This step needs to be performed by someone with administrative privileges and is repeated for each review.

7. <u>Generate reports</u> using the report selector screen **and review them with your HIV care team**:
   a. Validation reports
   b. Overview-of-service reports (top-level values for various key indicators)
      i. Performance Reports
   ii. Dashboard Reports
   c. Indicator-specific reports

(1) Sign In

The application is available at www.ehivqual.org. You can use any computer, at any time; all you need is a secure internet connection and your user ID and password. When you browse to this page, you will encounter the sign-in form:

Enter your user name and password and then click on "Submit." You will be directed to the home page for the application:
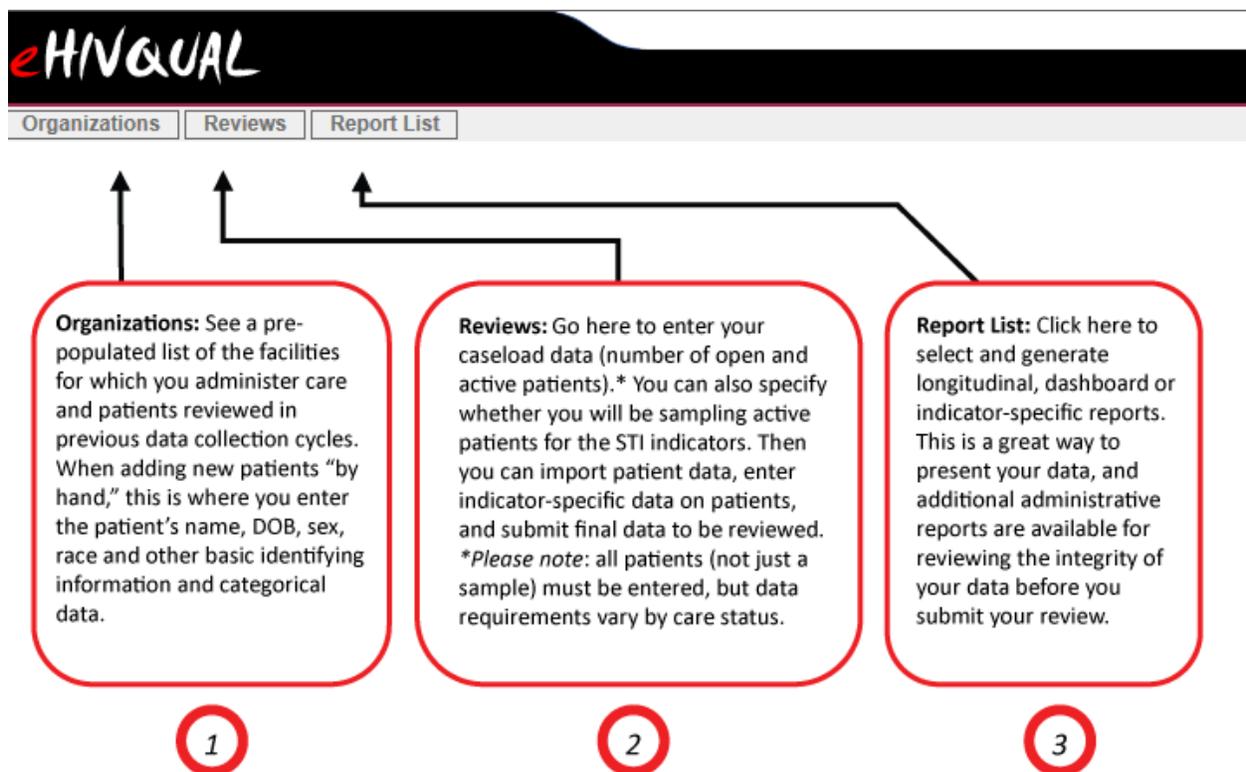
Organizations: See a pre-populated list of the facilities for which you administer care and patients reviewed in previous data collection cycles. When adding new patients "by hand," this is where you enter the patient's name, DOB, sex, race and other basic identifying information and categorical data.

Reviews: Go here to enter your caseload data (number of open and active patients).* You can also specify whether you will be sampling active patients for the STI indicators. Then you can import patient data, enter indicator-specific data on patients, and submit final data to be reviewed. *Please note*: all patients (not just a sample) must be entered, but data requirements vary by care status.

Report List: Click here to select and generate longitudinal, dashboard or indicator-specific reports. This is a great way to present your data, and additional administrative reports are available for reviewing the integrity of your data before you submit your review.

The three tabs beneath the "eHIVQUAL" logo provide access to most of the application

functionality: organization profiles are reviewed and patient information is entered or edited; review periods are specified and review data entered; and reports are run. The organization information has been pre-entered by the AIDS Institute, but you will need to add the patients' identifying information such as name, gender, DOB, etc.

(2) Create New Review Profile(s)

For each site/organization being reviewed this year, you will need to set up a new review profile. Unlike recent years, where we distinguished between "core" and "remaining new patients" reviews, there will only be one review per site. Click on the "Reviews" button on the home page and then click on "Add New Review." This will bring you to the "Review Details" screen:

Review Dates and Indicators	Submit Review Data

Review Detail

Review ID:

Organization Name: CGW Demo and Test (NY)

Review Start: 01/01/16 (mm/dd/yy)

Review End: 12/31/16 (mm/dd/yy)

STI Sampling: Submit Sample

Organizational Caseload Data

A. Enter the number of patients in your open caseload for this organization (includes HIV+ patients of any age seen for any service during the review period)   18

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

Submit   Cancel

Enter all of the required information. **Please note that the default review start and stop dates, 01/01/16 and 12/31/16, should not be changed for submissions of 2014 data to the AIDS Institute.**

Note the "Clinical Population Data" questions:

Organizational Caseload Data

A. Enter the number of patients in your open caseload for this organization (includes HIV+ patients of any age seen for any service during the review period)	18
B. How many of these patients were enrolled in your HIV program as of the end of the review period?	10

The numbers entered here should typically match those for "open" and "active" patients in your organizational cascade report. Considerable attention should be given to getting these numbers exactly right as you will not be able to proceed to the next steps if the number of active patients you enter does not match what is recorded here for (B). The number of total patients entered must also equal or exceed the number specified in (A).

Your answer to the STI Sampling question will determine whether you will be asked to submit STI indicator data on all applicable patients ("active" and at least 13 years old as of the beginning of the review period) or a random sample. If you choose to submit data for a sample, these patients will be chosen for you (details in subsequent steps).

Once you have entered all the parameters for this profile, click on "Submit" at the bottom of the page, and you will be brought back to the list of review periods, which now includes one for the current review period:

Review Data	ST	Define/Submit Reviews	STI	Submitted	Approved	Sample
CGW Demo and Test - Do Not Delete	NY	1/1/16-12/31/16	Sample			0 patients

Please note that patient identifying information entered for previous reviews is available for re-incorporation into your current review if the same patients received care in 2016. Previously submitted and approved review profiles and indicator data are moved to a separate reporting database, allowing you to compare past and present performance across all applicable indicators.

(3) Entering Patients to Review

NOTE: Manual data entry may not be required if your system can generate the appropriate information as we have Excel- and XML-based import procedure to automate the entry of patient data. Please see the eHIVQUAL Data Import Guide and other data import specifications on eHIVQUAL.org for additional instructions before proceeding. We also recommend that you contact us at qocreviews@health.state.ny.us if you plan to import data. In particular, we can provide additional guidance on how the import can be used as a preliminary step before keying in additional information or discuss options if your system can generate most but not all of the required indicator data.

Outside of the eHIVQUAL application, you will need to prepare a list of all HIV+ patients seen at your organization in 2016. At a minimum, this should include their names, birth dates and MRN numbers. You will also need to have information on hand regarding their care status in 2016:

- Active (enrolled in your HIV program as of 12/31/16)
- Non-active
  - o Deceased (before the end of the review year)
  - o Incarcerated (as of 12/31/16)
  - o In care elsewhere by the end of the review period (including name of facility or state/country if outside NYS)
  - o Other ("unknown care status")

It will also be helpful to include information about sex, race, exposure risk and diagnosis date (before or during the review period), which will be required for most patients.

With this information in hand, click on the "Organizations" button at the top-left corner of the application. This brings you to a list of sites for your organization:

Total Organizations: 1				
Organization Name	**ST**	**Setting NYS**	**Setting US**	**Active**
CGW Demo and Test - Do Not Delete	NY	NYS Community Health Center		Yes

Click on the link that specifies the name of the organization. After reviewing the information here—please contact us at qocreviews@health.ny.gov if anything is out of date—click on the Patients button. This brings you to the Patient List page:

CGW Demo and Test - Do Not Delete (NY)						Add New Patient
Total Patients: 4			Previous Patients: ◉ Include ○ Exclude			
Patient ID	**Active**	**Patient Name**	**MRN**	**DOB**	**Risk Factor**	
965940723	Yes	Alpha, Alpha	12345	05/05/1985	Injecting Drug User (IDU)	🗑
812098391	No	Beta, Beta	787878	03/03/1973	Heterosexual	🗑
979979746	No	Delta, Delta	999111	09/09/1999	Other	🗑
674712325	Yes	Gamma, Gamma	889900	07/07/1977	MSM	🗑

This defaults to a display of any previously entered patients. (It will not contain any patient data if this is your first review using eHIVQUAL.) You can exclude the previously entered patients if that helps you focus on the patients who were seen in 2016.

At this point, refer to master list of patients seen in 2016, **all of whom need to be entered if they were not reviewed in a previous submission**. To enter the patients for the current review period, use the "Add New Patient" button. This brings you to the Patient Detail page, where you can add the required patient identifying information:

Patient Detail	
Was the patient enrolled in your HIV program as of 12/31/16?	Yes ▾
Last Name:	Epsilon
First Name:	Epsilon
Middle Initial:	E
Medical Record #	23456
The following fields are required for most patients but may be omitted for patients who were incarcerated or in care elsewhere at the end of the review period.	
Date of Birth (mm/dd/yyyy):	07/07/1970 📅
Gender:	F->M Transgender ▾
Race/Ethnicity:	White non-Hispanic ▾
Exposure Category:	Unknown ▾
When was the patient first diagnosed as being HIV+ (at your clinic or elsewhere)?	Before 1/1/2016 ▾
	Insert Cancel

Click on "Insert" to add the patient to the list. After you have entered a few patients, it will look something like this:

CGW Demo and Test - Do Not Delete (NY)   Add New Patient

Total Patients: 20   Previous Patients: ⦿ Include ○ Exclude

Patient ID	Active	Patient Name	MRN	DOB	Risk Factor	
965940723	Yes	Alpha, Alpha	12345	05/05/1985	Injecting Drug User (IDU)	🗑
812098391	No	Beta, Beta	787878	03/03/1973	Heterosexual	🗑
979979746	No	Delta, Delta	999111	09/09/1999	Other	🗑
761861846	Yes	Epsilon, Epsilon	5	05/05/1955	Unknown	🗑
34701065	Yes	Eta, Eta	7	03/03/1933	Heterosexual	🗑
674712325	Yes	Gamma, Gamma	889900	07/07/1977	MSM	🗑
877818704	Yes	Iota, Iota	9	09/09/1991	Other	🗑
83199230	No	Kappa, Kappa	10	08/08/1981	Unknown	🗑
493695845	Yes	Lambda, Lambda	11	07/07/1971	Injecting Drug User (IDU)	🗑
559862030	No	Mu, Mu	12	06/06/1961	Heterosexual	🗑
746599294	Yes	Nu, Nu	13	05/05/1951	MSM	🗑
556176493	Yes	Omicron, Omicron	15	03/03/1931	Injecting Drug User (IDU)	🗑
640271259	No	Phi, Phi	20	04/04/1955	Injecting Drug User (IDU)	🗑
679137785	No	Pi, Pi	16	09/09/1995	Heterosexual	🗑
983821432	Yes	Rho, Rho	17	08/08/1985	Injecting Drug User (IDU)	🗑
526036774	No	Sigma, Sigma	18	07/07/1975	Other	🗑
720217349	No	Theta, Theta	8	01/01/2001	MSM	🗑
723475652	Yes	Upsilon, Upsilon	19	05/05/1965	Unknown	🗑
81441207	No	Xi, Xi	14	04/04/1941	Other	🗑
547919969	No	Zeta, Zeta	6	04/04/1944	Injecting Drug User (IDU)	🗑

Repeat this process for each new patient. When you are done, click on the "Reviews" button (upper left corner of application) to proceed to the next step.

(4) Select patients into the review profile(s)

Review Data	ST	Define/Submit Reviews	STI	Submitted	Approved	Sample
CGW Demo and Test - Do Not Delete	NY	1/1/16-12/31/16	Sample			0 patients 🗑

Click on the "0 patients" link for the review you want to populate, which brings you to the "Select Sample" page:

Please note: Before entering review data, the number of patients on this page much match or exceed the number you specified when defining the review, and the number of active patients must match exactly. Active patients will be selected automatically, but you must specify and include the applicable non-active patients, if any.

Active patients should not be removed from the sample.

[Details] [Start Review]

Available Patients: 10

Previous Patients: ◉ Include ○ Exclude

Selected Patients: 10

The patients in red font are subjected to STI review

	Active	Patient Name	MRN	Sex	DOB
☐	No	Beta, Beta	787878	F	03/03/1973
☐	No	Delta, Delta	999111	T	09/09/1999
☐	No	Kappa, Kappa	10	T	08/08/1981
☐	No	Mu, Mu	12	F	06/06/1961
☐	No	Phi, Phi	20	T	04/04/1955
☐	No	Pi, Pi	16	M	09/09/1995
☐	No	Sigma, Sigma	18	M	07/07/1975
☐	No	Theta, Theta	8	M	01/01/2001
☐	No	Xi, Xi	14	T	04/04/1941
☐	No	Zeta, Zeta	6	M	04/04/1944

	Patient Name	MRN	Active	DOB
☐	Alpha, Alpha	12345	Yes	05/05/1985
☐	Epsilon, Epsilon	5	Yes	05/05/1955
☐	Eta, Eta	7	Yes	03/03/1933
☐	Gamma, Gamma	889900	Yes	07/07/1977
☐	Iota, Iota	9	Yes	09/09/1991
☐	Lambda, Lambda	11	Yes	07/07/1971
☐	Nu, Nu	13	Yes	05/05/1951
☐	Omicron, Omicron	15	Yes	03/03/1931
☐	Rho, Rho	17	Yes	08/08/1985
☐	Upsilon, Upsilon	19	Yes	05/05/1965

All patients who were identified as "active" (enrolled in your HIV program in 2016) will automatically be selected. If you specified "Submit Sample" for the STI indicators, the randomly selected patients will be show in red font. Given the limited number of patients in the demonstration data set, the sample size is equal to the number of active patients so all of them have been specified.

You still need to indicate which of the non-active patients were seen in 2016. If all patients in on the left were seen in 2016, simply click on the double right-pointing arrow to move them into the selection. Otherwise, click the checkboxes to the left of each patient to be included in the current review. Then click on the single arrow to move them from "Available Patients" to "Selected Patients":

Available Patients: 2

Previous Patients: ◉ Include ○ Exclude

Selected Patients: 18

The patients in red font are subjected to STI review

	Active	Patient Name	MRN	Sex	DOB
☐	No	Beta, Beta	787878	F	03/03/1973
☐	No	Delta, Delta	999111	T	09/09/1999

	Patient Name	MRN	Active	DOB
☐	Alpha, Alpha	12345	Yes	05/05/1985
☐	Epsilon, Epsilon	5	Yes	05/05/1955
☐	Eta, Eta	7	Yes	03/03/1933
☐	Gamma, Gamma	889900	Yes	07/07/1977
☐	Iota, Iota	9	Yes	09/09/1991
☐	Kappa, Kappa	10	No	08/08/1981
☐	Lambda, Lambda	11	Yes	07/07/1971
☐	Mu, Mu	12	No	06/06/1961
☐	Nu, Nu	13	Yes	05/05/1951
☐	Omicron, Omicron	15	Yes	03/03/1931
☐	Phi, Phi	20	No	04/04/1955
☐	Pi, Pi	16	No	09/09/1995
☐	Rho, Rho	17	Yes	08/08/1985
☐	Sigma, Sigma	18	No	07/07/1975
☐	Theta, Theta	8	No	01/01/2001
☐	Upsilon, Upsilon	19	Yes	05/05/1965
☐	Xi, Xi	14	No	04/04/1941
☐	Zeta, Zeta	6	No	04/04/1944

After confirming that you have included all of the patients seen in, click on the "Start Review" button. This brings you to the "Review Patient List" page:

Details		CGW Demo and Test - Do Not Delete: 1/1/2016 - 12/31/2016 (18 patients)		Sample

Patient Name	MRN	Sex	DOB	Active
Alpha, Alpha	12345	Male	05/05/1985	Yes
Epsilon, Epsilon	5	TransFM	05/05/1955	Yes
Eta, Eta	7	Female	03/03/1933	Yes
Gamma, Gamma	889900	Male	07/07/1977	Yes
Iota, Iota	9	TransMF	09/09/1991	Yes
Kappa, Kappa	10	TransFM	08/08/1981	No
Lambda, Lambda	11	Male	07/07/1971	Yes
Mu, Mu	12	Female	06/06/1961	No
Nu, Nu	13	Male	05/05/1951	Yes
Omicron, Omicron	15	TransFM	03/03/1931	Yes
Phi, Phi	20	TransFM	04/04/1955	No
Pi, Pi	16	Male	09/09/1995	No
Rho, Rho	17	Female	08/08/1985	Yes
Sigma, Sigma	18	Male	07/07/1975	No
Theta, Theta	8	Male	01/01/2001	No
Upsilon, Upsilon	19	TransMF	05/05/1965	Yes
Xi, Xi	14	TransMF	04/04/1941	No
Zeta, Zeta	6	Male	04/04/1944	No

If you need to add or delete patients from the sample, click on the "Sample" button. **Active patients should not be removed from the sample.** If you need to modify the review period specifications (such as the caseload data), click on the "Details" button. Otherwise, you are ready to begin data entry!

(5) Entering Review Data

To start entering data, click on notepad logo next to a patient. This brings you to a list of indicators:

For active patients like this one, you will see three indicators (if the patient is part of the STI sample): Patient Profile; HIV Monitoring; and STI Testing. Non-active patients will initially present with the first two indicators, but HIV Monitoring may be removed depending on the information that is entered into the Patient Profile indicator screen (you are not asked to submit VL data for patients who were incarcerated or in care elsewhere as of the end of the review period).

To get started, click on "Patient Profile" and enter the required information, which may change dynamically based on initial responses:

Active patient example:

Non-active patient example:

As in previous reviews, the questions on the Profile are not direct measures of performance. Rather, it provides a place to enter additional patient characteristics (besides age, race, etc., which are entered as part of the patient's initial profile) that can then be correlated with viral load suppression and other aspects of care.

This is one of the areas where we have incorporated some additional documentation within the application. When you click on the drop-down list for the housing status question, you will be shown definitions for each of the options.

If applicable, proceed to the HIV Monitoring screen:

As you can see, we are no longer asking for a log of all viral loads during the years. Instead, we just need to know whether a viral load was obtained and, if so, the date and result (suppressed or unsuppressed) of the final VL during the year.

Finally, if applicable, proceed to the STI Indicators screen:

While you will see questions related to syphilis diagnosis and treatment, genital gonorrhea screening and treatment and genital Chlamydia screening and treatment for all patients, the extra-genital screens for gonorrhea and Chlamydia are only recorded for MSM or male-to-female transgendered patients.

Whenever you indicate that a patient was treated, you will be asked for the medications used. Please note that, for a patient with more than one infection during the year (different disease or different anatomic location), you will need to separately specify the medications prescribed. Whether a patient had one or more infections, each response should be restricted to the mediation(s) prescribed within 15 days of the date of the positive test or primary syphilis diagnosis.

Complete the data entry for all indicators on the list and then proceed to the next patient. When you return to data entry after a break, you can access the "Review Patient List" page by first clicking on "Reviews" (top-left corner of application) and then clicking on the name of the organization (site) in the applicable row.

Review Data	ST	Define/Submit Reviews	STI	Submitted	Approved	Sample
CGW Demo and Test - Do Not Delete	NY	1/1/16-12/31/16	Sample			18 patients

Clicking on the link with the review period dates returns you to the "Review Details" page, where you can update the review specifications as needed. Clicking on the number of patients in the "Sample" column returns you to the page where you can add patients to the review or remove them. Be extremely careful when removing patients as all data entered for these patients will be deleted. Contact our office before removing any active patients.

All data that you submit, by clicking on "Next" or "Update," are saved as you go, but it's generally advisable to complete data entry for any particular patient in one session so you don't have to remember where you left off.

(6) Data Validation

Data validation is a critically important step in the final certification of data quality. It is important to have a second person check all manual data collection forms for completeness and to review at least some forms for accuracy. Other steps are outlined below. <u>Also see the "Final Steps before Submitting" guide for additional details on ways to review your data.</u>

Data Completeness

- The **Consolidated Validation Report** provides an overview of any problems that the application can automatically detect. <u>Please note that final responsibility for the integrity of your submissions depends on your attention to any numbers that do not seem "right" and correction of any related errors of omission or commission.</u>

- The **Detailed Data Validation Report** in eHIVQUAL prints out "******" where there is no value for a patient for a given indicator or indicators. This means that no data were entered for the indicator and there should be. (If no data were expected—for example, baseline resistance data for a patient who was already on ARV therapy at the start of the review period—the report prints "--" instead.)

- The **Detailed Data Validation Report** also prints out the values entered for the high-level measures within each clinical indicator. For instance, the "ARV" column will contain a "Yes" if the patient was on ARV therapy during the review period or "No" if the patient was not screened during the review period. This report should be used to check both accuracy and completeness. Careful scanning of this report may result in observation of values that appear to be incorrect, for example, a patient known to be stable for years might appear with a high viral load, or a patient known to be on medication may appear as not prescribed medication, or a patient may have been inadvertently diagnosed with a condition because of a data entry mistake.

- It will be useful to print out this report periodically as you enter data, such as after every 5 or 10 patients, to identify possible errors in the data entry.

Data Accuracy

- Once you have entered all the data for your sample, you should print out all the reports and review them carefully for accuracy.

- The questions to ask to ensure accuracy are:

    1. **Is the sample size correct for each report?**

        Some reports are generated for the entire sample. This should be easy to check. Other reports are for only a sub-sample, such as all the MSM and MtF patients or just the patients newly diagnosed during the review period. Sub-sample reports will be easier to verify if you keep track of these patients during data entry.

    2. **Do the percentages make sense?**

        eHIVQUAL reports generally calculate a percentage for each indicator: the percentage of patients that received care in accordance with HIVQUAL quality standards. Of course this is part of what you want to find out by using eHIVQUAL, but you probably already have a sense of what is happening in your clinic. Double check when the percentages seem too high or too low.

    3. **Are the results consistent?**

Data entry problems can sometimes lead to inconsistent results, such as baseline resistance screening for patients previously on ARV therapy. Use the **Detailed Data Validation Report** to check values for the core indicators for each patient and ensure they are consistent.

To produce the Data Validation Report, follow these steps:

1. When logged into eHIVQUAL, click on the "Report List" tab (top left-hand corner).

2. Under "Category," select "Administrative Reports"
3. Under "Report," click on "Detailed Data Validation"
4. Under "Review Period" select the dates of the review (1/1/16-12/31/16).

5. Click on "Report", at the bottom of the page.

6. Repeat for other components of the data validation process (see "Final Steps before Submitting Data") and other reports of interest. At a minimum, you should review all of the reports in the Dashboard and Performance Reports categories before submitting your data.

7. Review reports and correct data entry as indicated.

(7) <u>Submit Data</u>

To formally submit a program's review, follow these steps:

1. At the "Review Details" page, select the "Submit Review Data" tab.

Review Dates and Indicators	Submit Review Data

Final Step: Data Submission

I affirm the HIV Medical Director/eHIVQUAL Director who provides direct medical supervision has reviewed the data.

Name of Director: [_____]

After reviewing your eHIVQUAL data reports what are your key findings?

[   ]

* Optional for non-New York providers

What actions does your organization plan to implement in response to these findings?

[   ]

* Optional for non-New York providers

User Comments:*

[   ]

* Optional for all providers

This is the final step after reviewing and entering all required data elements. Before you submit, please make sure to <u>READ THIS DOCUMENT</u> and follow the instructions to check the integrity of your data.

Ready to submit? [No ∨]

Name of Person Submitting Data: [_____]

Once you select the 'Yes' option above, the data will not be able to modified at all without HIVQUAL headquarter's permission.

Fill out all of the required information.

2. Confirm that the submission is complete. If so, select "Yes" from the dropdown list "Ready to submit?"

This is the final step after reviewing and entering all required data elements. Please make sure to check the integrity of the data by using the 'Detailed Data Validation' report under Report List to check for any missing data.

Thank you for your data submission. We will review it and follow up with you as soon as possible.

You must click on 'Update' button belew to complete the submission process.

Ready to submit? Yes ▾

Name of Person Submitting Data: Sam Someone

Once you select the 'Yes' option above, the data will not be able to modified at all without HIVQUAL headquarter's permission.

3. Click on the "Update" button below to complete the submission process. It will be reviewed by AIDS Institute staff, and you will receive an e-mail confirmation or additional guidance shortly.

4. **If you have entered more than one sample for the review year (multiple organizations/sites), steps 1 through 3 need to be reapeated for each review profile.**

(8) Generating Reports

Generating and reviewing reports is an essential aspect of the eHIVQUAL review process. This is the payoff for your work! New reports this year will include lists of untreated/unscreened patients for each indicator and a summary of unusually high or low indicator scores.

To produce reports, click on the "Report List" button at the top left corner of the application, which brings you to the Report Selector page:

The current review period is specified by default. If you have more than one clinic, you will see a sample size equal to all patients. To run a report for a particular clinic or clinics, click on "Selected Programs" and select the intended clinic. Here, we will take a look at the test data for 2016 demo program we've been using throughout this guide:

In this case, all of the test patients were entered into one site ("CGW Import Test"). If your patients are distributed among multiple sites, you can report on any subset of sites by clicking on "Selected Programs" and Ctrl/Cmd-clicking on sites as desired. Regardless of the number of sites, the patient population can also be subdivided in various other ways using the filters available in the Lab Results and Patient Characteristics sections:

The filters in these two areas provide options for selecting patients by suppression status, age, gender, the sample (active or non-active) and eight other "additional criteria" such as race, exposure risk, etc. Any or all of these filtering techniques may be used in combination. Millions of possibilities!

Here's a simple example for this test site that restricts the reporting to male patients who were under 35 years old at the beginning of the review period:

The sample size has changed from 94 to 16, with female or transgendered patients and older men temporarily excluded.

Once the desired sample has been established, producing a report is a simple matter of clicking on the report's name in the "Report" list and then clicking on the "Report" button at the bottom of the form. Of note, the reports are grouped into categories; select the category of interest (e.g., "HIVQUAL Dashboards") from the drop-down list at the top right corner of the page. The reports listed under the "Report" list will change when a different report category is selected:

Once the report has been produced, it can be printed by clicking on the printer icon and selecting the desired local or network printer. The data can also be saved as PDF or Excel files using the drop-down "Select a format" list at the top of the page, clicking on the "Save a Copy" link and then selecting the desired location to save the file. **NB: Reports with graphic elements (charts, tables, etc.) may display improperly on the screen when using browsers other than Internet Explorer. However, saving the report as a PDF file will generate properly formatted results.**

OTHER REFERENCE MATERIALS

A complete set of reference materials is available on the eHIVQUAL Web site, www.ehivqual.org, including:

1) eHIVQUAL Announcements
2) Report from Previous Review Period (2014)
3) Webinars
    i. Schedule
    ii. Recordings and transcripts from previous webinars
4) Instructions
    i. Account Management Guide
    ii. Users' Guide (this document)
    iii. Final Steps before Submitting Data
5) Indicator Definitions Document and Appendix (algorithms)
6) Sampling Methodology
7) Chart Abstraction Tool
8) Data Import Guidelines1
    i. Data Import Guide
    ii. Data Dictionary
    iii. XML specifications and sample file
    iv. Excel import template and sample file

Additional resources are included under "Related Links." In particular, clicking on the HIVguidelines.org link will bring you to a page where you can find reference materials for the other components of the review.

CONTACT INFORMATION

eHIVQUAL Administrative Office
To schedule a phone call for guidance in the interpreation of the clinical indicators or for assistance accessing and using the web-based eHIVQUAL application, please contact our office by e-mail at qocreviews@health.state.ny.us.