

Guidance ECRS 2013-1

(Revised 04/21/2015 to include instructions for provider agency staff to monitor compliance)

This is the first in a series of communication regarding guidance on requirements for data entry into the Electronic Case Record System (Therap). Please share this guidance with your organization's Therap users in order for them to know what is being required **effective Monday 9/30/2013**. It is extremely important to be consistent in our data entry so that when monitoring or reporting occurs within the system, that the information is reliable and valid.

This guidance – (ECRS 2013-1) is in regard to the Medical Appointment record portion of the electronic case record system (Therap). As a State, we are required to track and report on the occurrence of several medical items such as the Comprehensive Physical, Dental Examination by a Dentist, etc. To assure that entry into the electronic case record is consistent and will provide the necessary information for reporting purposes, please do the following:

Comprehensive Physical Examinations

For Appointment Type* - Please select "Primary Care" from the look up table.

Reason for Appointment - Please select "Annual Physical" in the drop down box (this option should only be selected when the comprehensive physical examination is completed as scheduled – i.e. every 1, 2 or 3 years).

For all other "Primary Care" appointments – Please select "Follow-up Appointment", "Regularly Scheduled", etc. whichever is appropriate, as the reason for the appointment.

Enter the follow-up or return to office (RTO) information in the comment section at the bottom of the screen.

All other information in the medical appointment record should be completed as you have been doing.

Scan and attach the Physical Examination form and/or MAIR as an external document in Section 3 of the medical appointment record.

Annual Dental Examinations by the Dentist

For Appointment Type* - Please select "Dentist" from the look up table (Select Primary Care if the patient is edentulous or has no teeth and is not being seen by a Dentist).

Reason for Appointment – Please select “Annual Dental Screening” from the drop down box (this option should only be selected whenever a dental examination or oral cancer screening is completed by the Dentist or PCP).

For all other “Dentist” appointments – Please select “Dental Cleaning”, “Follow Up Appointment”, or “Regularly Scheduled”, whichever is appropriate, as the reason for the appointment.

Enter the follow-up or return to office (RTO) information in the comment section at the bottom of the screen.

All other information in the medical appointment record should be completed as you have been doing.

Scan and attach the Dental Examination and/or DAIR as an external document in Section 3 of the medical appointment record.

Colonoscopy

For Appointment Type* - Please select “Primary Care or Gastroenterology” from the look up table.

Reason for Appointment – Please select “Colonoscopy” from the drop down box.

Enter the follow-up or return to office (RTO) information in the comment section at the bottom of the screen.

All other information in the medical appointment record should be completed as you have been doing.

Scan and attach the colonoscopy report and/or MAIR as an external document in Section 3 of the medical appointment record.

DEXA Scan

For Appointment Type* - Please select “OB/GYN, Primary Care, or Rheumatology” from the look up table.

Reason for Appointment – Please select “DEXA Scan” from the drop down box.

Enter the follow-up or return to office (RTO) information in the comment section at the bottom of the screen.

All other information in the medical appointment record should be completed as you have been doing.

Scan and attach the DEXA Scan report and/or MAIR as an external document in Section 3 of the medical appointment record.

Eye Examinations

For Appointment Type* - Please select "Ophthalmology/Optometry" from the look up table.

Reason for Appointment – Please select "Eye Exam" from the drop down box.

Enter the follow-up or return to office (RTO) information in the comment section at the bottom of the screen.

All other information in the medical appointment record should be completed as you have been doing.

Scan and attach the MAIR as an external document in Section 3 of the medical appointment record.

OB/GYN Examinations/mammograms

For Appointment Type* - Please select "Obstetrics & Gynecology" or "Radiology", whichever is appropriate, from the look up table.

Reason for Appointment – Please select "Mammogram" or "OB/GYN Exam & Pap", whichever is appropriate, from the drop down box.

Enter the follow-up or return to office (RTO) information in the comment section at the bottom of the screen.

All other information in the medical appointment record should be completed as you have been doing.

Scan and attach the Mammogram report and/or MAIR as an external document in Section 3 of the medical appointment record.

PSA Screenings (Primarily for men over 50 years of age)

For Appointment Type* - Please select "Primary Care" or "Urology", whichever is appropriate, from the look up table.

Reason for Appointment – Please select "PSA Screening" from the drop down box.

For all other "Urology" appointments – Please select "Follow Up Appointment" or "Regularly Scheduled" as the Reason for Appointment

Enter the follow-up or return to office (RTO) information in the comment section at the bottom of the screen.

All other information in the medical appointment record should be completed as you have been doing.

Scan and attach the PSA screening report and/or MAIR as an external document in section 3 of the medical appointment record.

Adherence to the above guidance will insure that reports being generated from this information will be dependable and valid as to the medical services being provided to the individuals that we all serve.

Following is the screen shot from Therap with the two specific fields being referenced above shown.

Should you have any questions, please let me know.

Bob

Section 2 - Appointment Information

Appointment With*

Consultant:	<input type="text"/>	<input type="button" value="Look Up"/>	<input type="button" value="Clear"/>
Hospital:	<input type="text"/>	<input type="button" value="Look Up"/>	<input type="button" value="Clear"/>
Other:	<input type="text"/>		

Appointment Type:*	<input type="text" value="Dentist"/>	<input type="button" value="Look Up"/>
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Location Type:	<input type="text" value="- Please Select -"/>	If Other:
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Address

Street 1:	<input type="text"/>	Street 2:	<input type="text"/>
City:	<input type="text"/>	County:	<input type="text"/>
State:	<input type="text" value="- Please Select -"/>	Zip Code:	<input type="text"/>
Phone:	<input type="text"/>	Pick Up At:	<input type="text"/>
Driver:	<input type="text"/>		
Depart Time:	<input type="text" value=""/> : <input type="text" value=""/>	<input type="radio" value="am"/> am	<input type="radio" value="pm"/> pm

Reason for Appointment:	<input type="text" value="Annual Physical"/>
Description:	<input type="text" value="Annual Physical"/>

- Please Select -
- Annual Dental Screening
- Annual Physical
- Colonoscopy
- DEXA Scan
- Dental Cleaning
- Eye Exam

Provider Agency personnel, who have access to the report library, can monitor compliance with this guidance on a regular basis. This is done by going to the report library and choosing “Health Appointment Report by Appointment Type”.

The screenshot shows a web browser window with the URL <https://secure.therapservices.net/ma/flexibleReports/reportList.do?isNotInitialRequest!>. The page title is "Therap :: Report Library :: R...". The user is logged in as "Bancroft Neurohealth" with the role "Bob Goodhart, Quality Assurance Administrator". The page displays a "List of Reports" section with search filters for "Report Name" and "Report Description". Below the search filters, it indicates "76 items found, displaying 1 to 15." and provides navigation links: "[First/Prev] 1, 2, 3, 4, 5, 6 [Next/Last]". The main content is a table of reports:

Report Name	Report Screenshot
Behavior Detailed Report Details of each Behavior. Please do not search more than two months.	NONE
Demographic Report :: Top 10 Diagnosis	NONE
Diagnosis Code Report	NONE
Diagnosis Report - all active Individual (without program)	NONE
Diagnosis Report - all active Individual by Program	NONE
Diagnosis Report - All Active Individual with Program List of Active Individuals with all Diagnosis.	NONE
Export IDF for Import Please read the following instructions carefully. After downloading the spreadsheet, you will have to change the following things- 1. Change the column header "Individuals Time Zone" to "Individual's Time Zone"	NONE
Export IDF for Import - with Program and Site PLEASE READ ALL THE INSTRUCTIONS CAREFULLY 1. After downloading the spreadsheet - change the column header "Individuals Time Zone" to "Individual's Time Zone" 2. If there is more than one record for an individual, import will not work and may end up partial data import. This may happen where an individual is enrolled in more than one program.	NONE
Export Medication History for Import	NONE
Export User for Import	NONE
GER Report - Management Summary GER Report - Management Summary	NONE
Health Appointment Report by Appointment Type	NONE
IDF Contact - All Active Individual	NONE
IDF Contact - By Individual List of Contacts of an individual. This report will be generated from IDF contacts.	NONE
IDF Detail - All Active Individuals (without Program)	NONE

At the bottom of the page, there is a yellow bar with a "Back" button and a URL: <https://secure.therapservices.net/ma/flexibleReports/reportCriteria.do?reportId=10416>.

1. Type in the appointment type “Annual Physical”, “Dentist”, “Primary Care”, etc. based on the instructions above.
2. Enter the start date for the period you want to monitor
3. Enter the end date for the period you want to monitor
4. Click “continue”

5. Monitor detail of report for compliance.

Robert T. Goodhart

Quality Assurance Administrator
DDDS - Office of Quality Improvement
2540 Wrangle Hill Road, Suite 200
Bear, DE 19701
(302) 836-2176 Phone New Castle
(302) 741-9343 Phone Kent/Sussex
(302) 836-2647 Fax

"Think of how you can assist on a problem, not who to blame." Author Unknown