California OSHPD Reporting User Guide

Version 1.0
12/30/2022

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Table of Contents

Overview **3**

Reporting Process **3**

Reporting User Interface 3

Monitoring Reporting Prior to Submission 4

Reporting Summary Widget 5

Creating a New Batch and Submitting Files 7

Viewing Batch Details 8

Accepting or Rejecting a Batch 9

Accepting or Rejecting an Individual Record 10

Workflows for Collecting Data **11**

File Logic **12**

System Setup **13**

Global Codes 13

Programs 13

Procedure Code 14

Roles and Permissions 14

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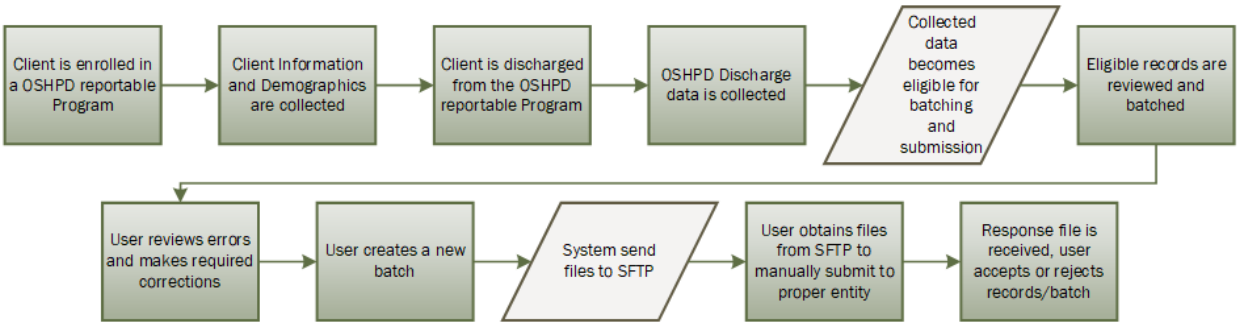
Overview

The OSHPD data collection process begins at time of program enrollment. A user will create a Program Assignment for a OSHPD reportable program with a Program Status of enrolled. This may be done using the Program Details Screen or the Program tab in the Registration. Following the provision of services the client is discharged from the program using the SC Discharge Document or updating the Program Assignment Status to Discharged. At this point a user my complete the OSHP Discharge document to collect the remaining required data for the OSHPD submission file.

Reporting Process



Reporting User Interface

Once the data has been collected and is eligible for submission the records are available to be reviewed via the OSHPD Reporting Summary List Page. There the user can review the available candidate records, errors the records may have and the field level data for each record.

Navigating to the OSHPD Reporting Summary List Page.

1. Search for the OSHPD Reporting Summary List Page. (My Office) using the Search icon. Click on the OSHPD Reporting Summary List Page in the typable drop down. This will open the OSHPD Reporting Summary List Page.
2. Alternatively, locate the OSHPD Reporting Summary List Page using the Quicklink if this has been configured in your environment.

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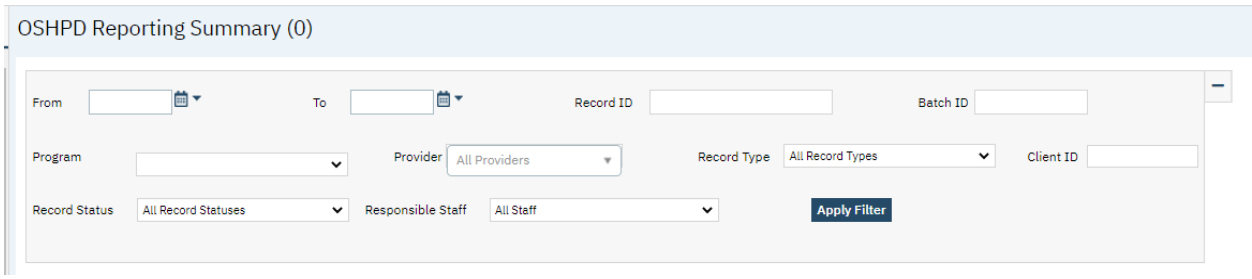
The OSHPD Reporting Summary List Page displays all eligible OSHPD submission records according to the following Status Types:

- In Progress = a record was created but not yet batched for reporting.
- Cancel = a record was created and batched for submission then later canceled. These records are no longer eligible for batching.
- Sent = the record was batched for submission and is awaiting response. These records are no longer eligible for batching.
- Accepted = A response file was received for the batch the record was included in and the record was marked as Accepted. These records are no longer eligible for batching.
- Reject = A response file was received for the batch the record was included in and the record was marked as Rejected. These records are no longer eligible for batching.

There are filters available in the OSHPD Reporting Summary List Page. These are as follows:

- Select a date range (From Date and To Date) for which data to be pulled for
- Record ID - this is the unique id assigned to the OSHPD record
- Batch ID - if a record has previously been batched, this field will filter on a specific Batch ID.
- Program - indicates which program the OSHPD record is associated with
- Provider - if the customer is a County entity and is utilizing MCO, this will indicate which Contracted Provider the OSHPD record is associated with
- Record Type - this will default to OSPHD
- Client ID - this is the unique SC identifier of the client record associated with the OSHPD record.
- Record Status - indicates the current status of the record.
- Responsible Staff - the staff who completed the data collection for the record will display



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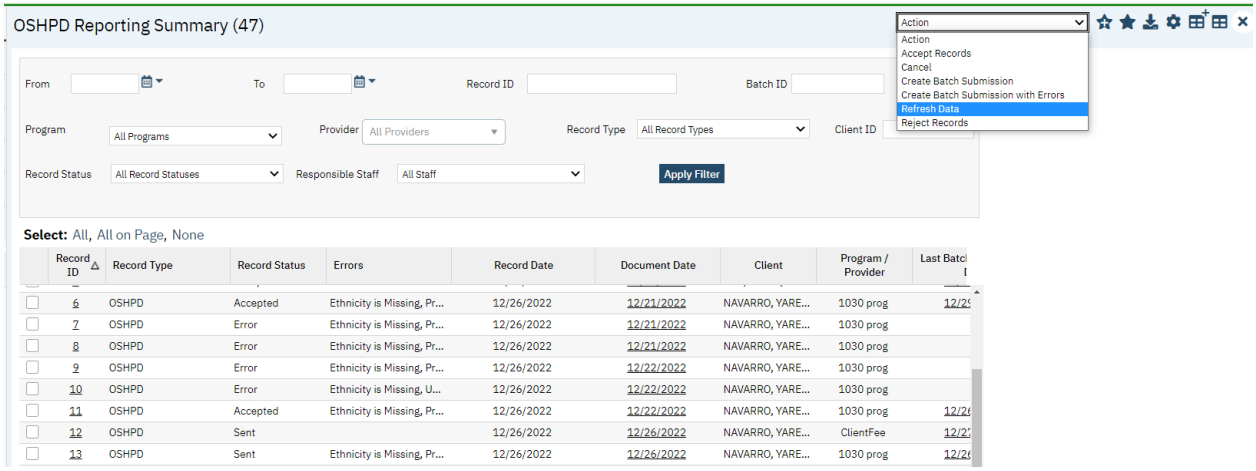
Monitoring Reporting Prior to Submission

To monitor records throughout the reporting period, prior to your submission deadline, you can complete the following steps:

1. Navigate to the OSHPD Reporting Summary List Page.
2. Review or filter for records in a status of In Progress and/or Error since the last batch creation date or the last review date.
3. For records with a status of Error, use the Record ID hyperlink to navigate to the OSHPD Record Detail Page to further review of error messages and record data.
4. Work error messages by navigating to the screen in which the source data resides.
5. Once data has been corrected, navigate back to the OSHPD Reporting Summary List page and use the check box to select the record(s) that have been corrected then select Refresh Data from the Action drop down to pull the corrected data into that record to later be batched for submission.



Repeat these steps as many times as needed in order to view errors, make corrections and confirm the errors are resolved.

Reporting Summary Widget

Another utility available for monitoring records throughout the reporting period is the OSHPD Reporting Summary Widget. From the Dashboard a user can review basic statistics of records within a specific day range and Program(s).

1. Navigate to My Office > Dashboard
2. Locate the OSHPD Reporting Summary Widget

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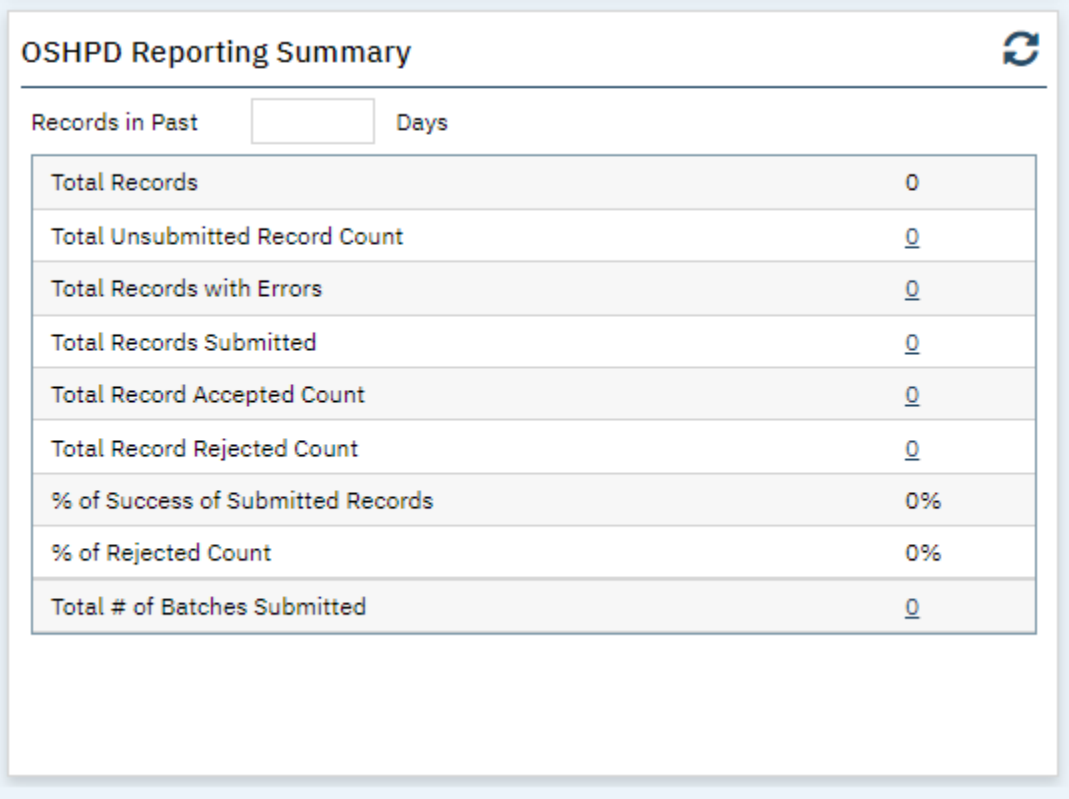
3. Enter a number of past days for which to filter the records.
4. Select All or a specific Program using the drop down.
5. Click the refresh icon in the right hand corner of the widget if filters were modified.
6. Within the widget are hyperlinks that will direct the user to prefiltered list pages where they can review records, modify statuses or work errors as needed.



OSHPD Reporting Summary

Records in Past Days

Total Records	0
Total Unsubmitted Record Count	0
Total Records with Errors	0
Total Records Submitted	0
Total Record Accepted Count	0
Total Record Rejected Count	0
% of Success of Submitted Records	0%
% of Rejected Count	0%
Total # of Batches Submitted	0

The OSHPD Reporting Summary Widget displays the follow information:

- Total Records - distinct count of all records.
- Total Unsubmitted Record Count - distinct count of all records with a status of In Progress, Error, or Canceled. Clicking the number hyperlink will direct the user to the list page pre-filtered for these values.
- Total Records with Errors - distinct count of all records with a status Error. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- Total Records Submitted - distinct count of all records with a status Sent. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- Total Records Accepted Count - distinct count of all records with a status Accepted. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.

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- Total Record Rejected Count - distinct count of all records with a status Rejected. Clicking the number hyperlink will direct the user to the list page pre-filtered for this value.
- % of Success of Submitted Records - displays the percentage of records with a status of Accepted of the records sent during the reporting period.
- % of Rejected Count - displays the percentage of records with a status of Rejected of the records sent during the period.
- Total # of Batches Submitted - this displays the distinct count of batches that were generated during the period. Clicking the number hyperlink will direct the user to the Compliance Batch list page pre-filtered for these values.
- Top 10 Errors - up to 10 errors will display in the last rows of the widget. This will display the top 10 most common errors for the period based on distinct counts. Clicking the number hyperlink will direct the user to the list page pre-filtered for applicable error.

Creating a New Batch and Submitting Files

To create a batch for submission there are two options, creating a batch file without errors or creating a batch file with errors.

To create a batch without errors:

1. Navigate to the OSHPD Reporting Summary List Page.
2. Filter records as desired based on last batch date or other requirements.
3. For Record Status set filter to In Progress.
4. Apply filter.
5. Review displayed records as needed.
6. Select the appropriate records. This can be done for individual records using the check boxes in the left hand column, clicking Select All or Select All on Page.
7. Once desired records have been selected use the Action drop down in the top right to select Create Batch Submission.
8. A pop up window will appear confirming the action to batch X number of records.
9. Click OK.
10. Once results have processed a green message will display above the filters confirming the action was successful.
11. The batched file is now available for retrieval via the Batch Detail Page or the SFTP.

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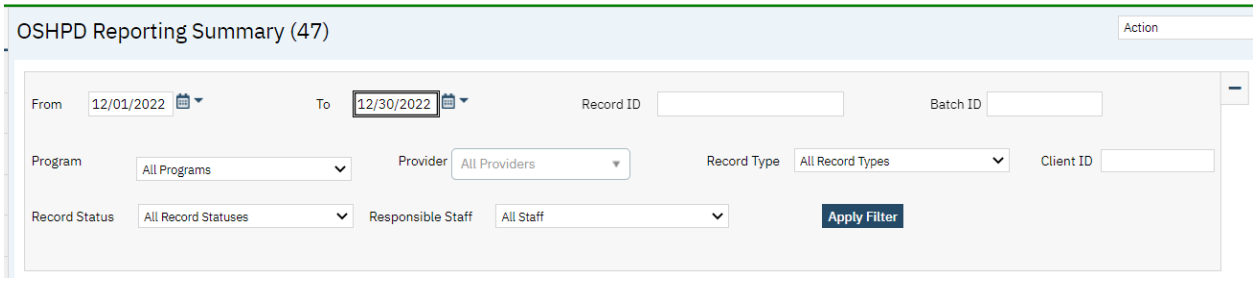

Under certain circumstances it may be necessary to create a batch record with errors. In this situation, follow these steps:

1. Navigate to the OSHPD Reporting Summary List Page.
2. Filter records as desired based on last batch date or other requirements.
3. For Record Status set filter to In Progress and Error.
4. Apply filter.
5. Review displayed records as needed.
6. Select the appropriate records. This can be done for individual records using the check boxes in the left hand column, clicking Select All or Select All on Page.
7. Once desired records have been selected use the Action drop down in the top right to select Create Batch Submission.
8. A pop up window will appear confirming the action to batch X number of records.
9. Click OK
10. Once results have processed a green message will display above the filters confirming the action was successful.
11. The batched file is now available for retrieval via the Batch Detail Page or the SFTP.

Viewing Batch Details

Once the batch has been generated there are two options for retrieving the file for submission. The first being from the customer's SFTP folder.

1. Navigate to the customer's SFTP folder.
2. Within that folder select the State Reporting folder.
3. Select the OSHPD folder.
4. Retrieve the file for the desired batch.

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Compliance Batch List Page (109)

Action

OSHPD | All Batch Statuses | All Batch Sumitted To | Apply Filter

Batch Creation Start 12/01/2022 | Batch Creation End 12/30/2022 | Batch ID

Batch Data Start | Batch Data End

Select: All, All on Page, None

Batch ID	Batch Type	Batch Status	Submitted To	Batch CreationDate / Time	Batch Data Start	Batch Data End	Total Record Count	Rejected	% Success
1348196	OSHPD	Sent	Alameda	12/30/2022 05:15:00	01/01/1900	12/30/2022	1	0	0.00%
1348195	OSHPD	Sent	Alameda	12/30/2022 04:56:34	12/01/2022	12/30/2022	1	0	0.00%
1348194	OSHPD	Sent	Alameda	12/30/2022 03:56:24	12/01/2022	12/30/2022	1	0	0.00%
1348193	OSHPD	Sent	Alameda	12/30/2022 03:34:00	12/01/2022	12/30/2022	1	0	0.00%
1348188	OSHPD	Sent	Alameda	12/30/2022 03:26:49	12/01/2022	12/30/2022	1	0	0.00%
1348181	OSHPD	Sent	Alameda	12/30/2022 11:34:15	12/01/2022	12/30/2022	1	0	0.00%
1348179	OSHPD	Sent	Alameda	12/29/2022 05:06:38	12/01/2022	12/30/2022	2	0	0.00%
1348178	OSHPD	Sent	Alameda	12/29/2022 05:05:02	12/01/2022	12/30/2022	1	0	0.00%
1348176	OSHPD	Sent	Alameda	12/29/2022 04:49:26	12/01/2022	12/30/2022	1	0	0.00%
1348175	OSHPD	Sent	Alameda	12/29/2022 04:27:45	12/07/2020	12/30/2022	1	0	0.00%

The second option is to utilize the Compliance Batch List Page.

1. Navigate to the Compliance Batch List Page using the search or Quicklinks as applicable.
2. Filter for Batch Type = OSHPD
3. Select other filters as appropriate.
4. Click Apply to refresh the List Page results.
5. Select the desired batch by clicking the Batch ID hyperlink, this will direct you to the Batch Detail Page.
6. From the Batch Detail Page click the hyperlink to the file in the Batch Details to download the results.

Accepting or Rejecting a Batch

Once the batch file has been sent to the appropriate entity, batches can be marked as accepted or rejected. To mark batches as accepted:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to OSHPD, set other filters as appropriate.
3. Click Apply Filter
4. To accept multiple batches select the check boxes on the left, click All or All on Page.
5. Use the action
6. Accepting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
7. In the Batch Summary section select Accept from the Batch Status drop down.

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Compliance Batch Details Page

Batch Summary

Batch ID	1348196	Batch Type	OSHPD
Batch Status	Sent	Reporting To	Alameda
Batch Data Start Date	01/01/1900	Batch Data End Date	12/30/2022
Batch Created By	Admin, System	Batch Creation Date/Time	12/30/2022 05:15:00

To mark batches as rejected:

1. Navigate to the Compliance Batch List Page
2. Set Batch Type Filter to OSHPD, set other filters as appropriate.
3. Click Apply Filter
4. To reject multiple batches select the check boxes on the left, click All or All on Page.
5. Accepting a batch can also be done individually by clicking the Batch Id hyperlink that directs you to the Compliance Batch Detail Page.
6. In the Batch Summary section select Accept from the Batch Status drop down.

Compliance Batch Details Page

Batch Status Changed

Batch Summary

Batch ID	1348196	Batch Type	OSHPD
Batch Status	Rejected	Reporting To	Alameda
Batch Data Start Date	01/01/1900	Batch Data End Date	12/30/2022
Batch Created By	Admin, System	Batch Creation Date/Time	12/30/2022 05:15:00

Accepting or Rejecting an Individual Record

Once the batch file has been sent to the appropriate entity, if a portion of records were accepted these can be marked as such. To mark records as accepted:

1. Navigate to the OSHPD Reporting Summary List Page.
2. Filter the results to display the records needing to be accepted. This can be done a number of ways including by date, Status, or Batch ID
3. Select the records you wish to accept using the check boxes, clicking All or All or Page.
4. Use the Action drop down to select Accept Records.

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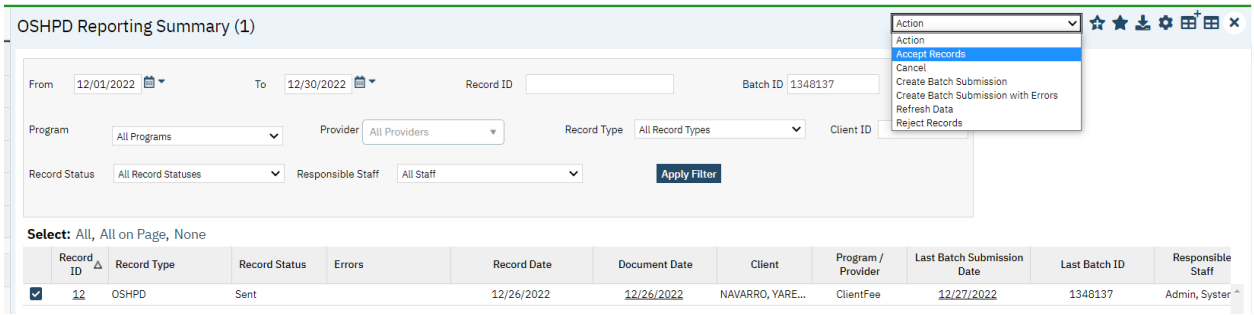
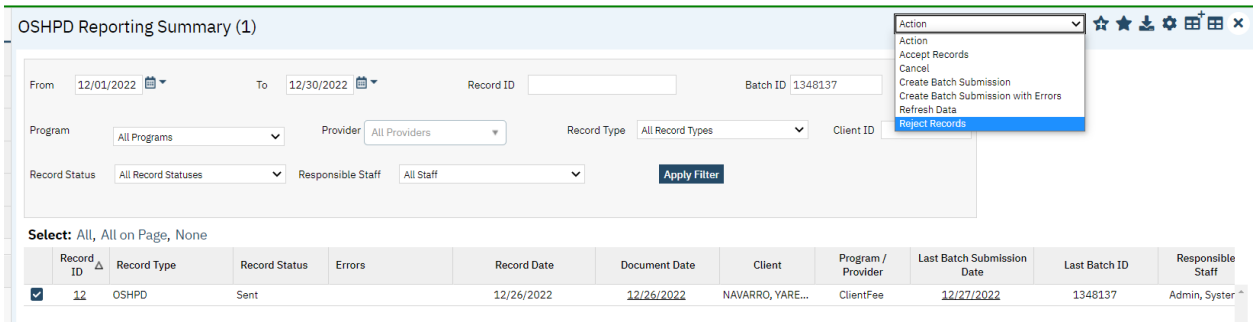


To mark records as rejected:

5. Navigate to the OSHPD Reporting Summary List Page.
6. Filter the results to display the records needing to be accepted. This can be done a number of ways including by date, Status, or Batch ID
7. Select the records you wish to reject using the check boxes, clicking All or All or Page.
8. Use the Action drop down to select Reject Records.



Workflows for Collecting Data

The clients that are eligible for reporting have been enrolled and discharged from a OSHPD reportable program. Please see the OSHPD File Mapping for more detailed specifications than the summary provided here.

SmartCare Screen	Description of Data
OSHPD Discharge Document	Type of Care Facility Identification Number Date of Birth

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SmartCare Screen	Description of Data
	Sex Ethnicity Race Zip Code Admission Date Source of Admission Point of origin Route of Admission Type of Admission Discharge Date Principal Diagnosis Present on Admission of Principal Diagnosis Other Diagnosis and Present on Admission Principal Procedure Code Principal Procedure Date Other Procedure Code and Other Procedures Dates External Causes of Morbidity and Present on Admission Patient's Social Security Number Disposition of Patient Abstract Record Number Pre Hosp Care & Resuscitation - DNR Order Expected Source of Payment Payer Category Type of Coverage Plan Code Number Preferred Language Spoken
Service Records	Total Charges

File Logic

The OSHPD records are reported within one field format. In order for a record to be eligible for submission the follow must occur:

1. The client must be enrolled in a Program with the proper setup and configuration detailed in the System Setup section of this guide.
2. The client must be discharged from the Program enrolled in step 1. This can be done using the SC Discharge Document or simply updating the Program Assignment Status to Discharged.
3. The client must have a completed OSHPD Discharge Document.

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System Setup

In order to properly submit acceptable data the environment needs to be configured with allowable values and configurations.

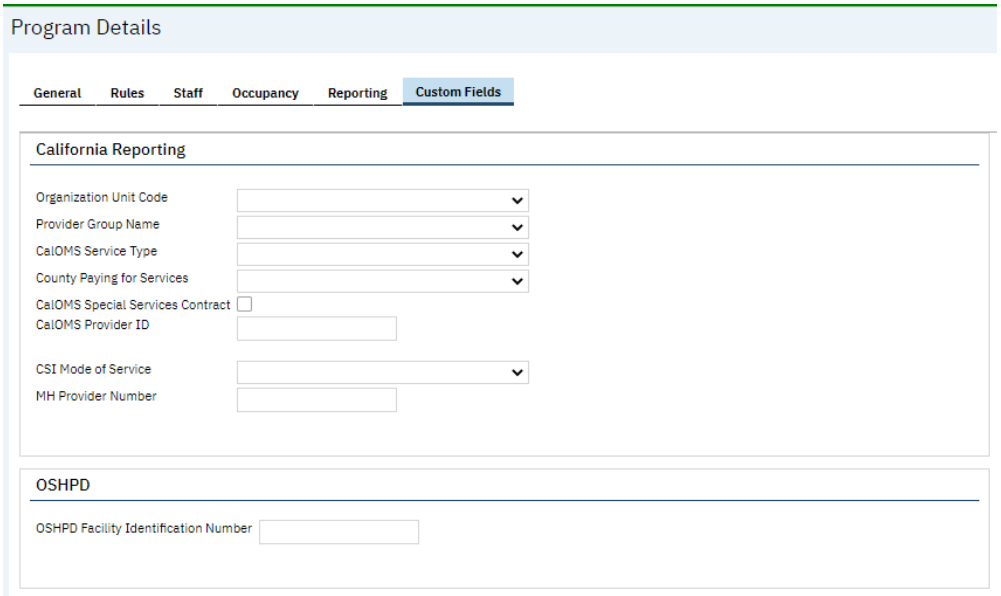
Global Codes

All of the Global Codes which need to be set up are in the Global Codes tab of the OSHPDFile Mapping spreadsheet. Please reference the File Mapping for details.

Programs

Program set up drives Program display logic within the OSHPD Document as well as the file submission. For a Program to be considered OSHPD reportable it must have an associated OSHPD Facility ID.

To set up the OSHPD Facility ID navigate to Administration > Programs, click the Program Name from the list to open the Program Details Navigate to the Custom Fields Tab to enter a 6 digit numeric value.



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Procedure Code

The OSHPD Discharge Document collects Procedure information in the form of ICD 10 PCS codes. A custom table with the allowable code set drives the data in the procedure code search. This table is delivered to the environment and requires no configuration.

Roles and Permissions

Depending on the logged in user's responsibilities they will need access to the following permissions. Navigate to Administration > Role Definition and permission the items below by role as needed.

1. To view OSHPD Document
    a. Select Permission Type > Document Codes (View)
    b. Grant OSHPD Discharge Document
    c. Select Permission Type > Screens
    d. Grant OSHPD Discharge Document
2. To edit OSHPD Documents
    a. Select Permission Type > Document Codes (Edit)
    b. Grant OSHPD Discharge Document
    c. Select Permission Type > Screens
    d. Grant OSHPD Discharge Document
3. To view the OSHPD Reporting Summary Widget
    a. Select Permission Type > Widgets
    b. Grant OSHPD Reporting Summary
4. To view OSHPD Records
    a. Select Permission Type > Screens
    b. Grant OSHPD Report Summary and OSHPD Report Summary Details
5. To view OSHPD Batch Records
    a. Select Permission Type > Screens
    b. Grant Compliance Batch List Page and Compliance Batch Detail Page

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