

Review Summary Reports, Identify Errors, and Create Custom Reports

Intro

Hello everyone. Welcome to the fourth video in our SIERA training series. In this video we'll cover how to review and create reports, and I'll also show you how to identify and correct errors in your data submission.

Report Dashboard

You are currently looking at the Report Dashboard. Once again, I want to note that what I'm about to show you is a test environment that is still in development. Some of the features are subject to change when we move to production. In addition, report statuses are fictional, and any data shown does not contain personally identifiable information – it is all test data.

In previous videos we gave you a deeper look into a report. Today, we are starting at the Report Dashboard. As a refresher, the Report Dashboard will display the report type, report period, due date, and status. This is also where you can submit your data file, view your report validation summary, and access error reports.

For purposes of this video, I have already uploaded a data file. The validation results are shown below under the Report Validation Summary, which gives you a high-level overview of the errors for each edit program. To look at the errors in more detail, we have provided links to the summary reports. Let's look at the Standard Edit Summary by clicking on the link.

Standard Edit Summary

The Standard Edit Summary Report shows the total number of records and displays the error tolerance level of 2%. You will also see the number of records with fatal flags. All fatal flags must be corrected in order for your data to be approved. Next you will see the number and percentage of records with critical flags. Critical flags are those that are applied towards the error tolerance level. If there are more than 2% of records with critical standard edit flags, then your data will fail the edit program. Lastly, you will see the number of records with warning flags. These errors are not applied towards the error tolerance level but are provided to alert facilities to review possible errors in the data.

Below, you will see the errors broken down by flag type. The columns show the data element, edit flag, number of flags, number of records with flags, and the percentage of records with flags.

A new feature will be the ability to filter record level data three different ways: by type of flag, data element, and individual edit flag. Clicking on any of these will take you to a Standard Edit Detail report, which will show all the records for the selected filter. For example, if I click here on the Fatal Flag link, it will take me to a Standard Edit Detail

Report with all fatal flags. If I want to select a different filter, I can go back to the previous page by clicking on the Standard Edit Summary link at the top. If I want to view all errors for Principal Diagnosis, I can click on the data element and it will take me to a report that just shows the records that have errors related to Principal Diagnosis. Lastly, I can go back and click on an individual edit flag, and it will take me to a filtered report with just those records with that specific flag.

From this report, there are two ways to correct this record. One option is to click on the edit link, which will take you to our Record Detail page. This page gives you a vertical view of this record. As you can see, errors are highlighted and include an error message. Now I'm going to go back to the Selected Edit Flag report to show you the second option for correcting the record. From here, you can click on the Record Listing link at the top, which will take you to the grid view of the records. On this page, any errors can be corrected, but only blank or invalid errors will be highlighted. Once errors are corrected, please be sure to save and validate.

We also have summary reports for the Comparative, Trend, and Readmission Edits. The Readmission Edit Summary will only display on an Inpatient submission. The Comparative Edit Summary Report displays the total number of records, as well as the number of critical and warning flags. This Report also shows the data element, percentage of records reported, the edit flag, and a description of the edit flag. The Comparative Edit Summary does not provide filtering capabilities. This is because these edits do not apply at an individual record level. Instead, they evaluate for a reasonable distribution of data within each data element category.

The Trend Edit Summary Report also displays the total number of records and the number of critical and warning flags. This Report shows the data element, description, edit flag, the current report period value, and the values for the previous two historical report periods. As with the Comparative Edit Summary, there is no filtering. The Trend Edits check for inconsistencies in data by comparing current and past report periods rather than checking for errors at an individual record level.

Now that we've covered our summary reports, I want to show you an exciting new feature – how to create your own custom reports.

Let's click on Selected Edit Flag Report. A pop-up will then display. This feature allows you to create custom reports that are filtered by data element and edit flag. To create a custom report, you will first want to select one or more data elements from the drop down. You can also select All for all data elements. I'm going to select Principal Diagnosis and Service Date. Next, you will want to select the corresponding edit flag. This dropdown gives you the option to select all edit flags, all of a particular type of edit flag, or an individual edit flag. I want to see all invalid Principal Diagnoses, so I am going to select S002. I also want to see all the blank Service Dates, so I'll select S001.

Before we create a report, I want to highlight the different filtering options. If you select the Filter Grouping "Or," which is the default, your report will include records with Invalid

Principal Diagnoses or Blank Service Dates. However, if you select “AND,” your custom report will only show records that have both Invalid Principal Diagnoses and Blank Service Dates. You can sort even further by data element in either ascending or descending order, and also by date range. When you’re done selecting filters, click “Create” to generate your custom report.

Here is the custom selected edit flag report. From here, you can continue to modify it. For example, you can click on one of the data elements to change the view between ascending and descending order. In addition, you can click on the filter button to modify what you’ve already created, or you can create a brand new report by either clicking the reset button to clear all fields or simply change the previously selected options. You can also print the report or export it to an Excel spreadsheet.

Now I’m going to show you the Selected Data Element Report feature. This allows you to filter by data element, action, and value. For example, I am going to select Expected Source of Payment as the data element. The action ties the data element and filter criteria together. It will be defaulted to equals, but there are other options which will vary depending on the data element selected. For the filter criteria, you have the option to enter up to three values. These values will also vary depending on what data element is selected. For some data elements, like Expected Source of Payment, there will be a drop down to select from. For this example, I’m going to select MC, which is MediCal. For other data elements, like Total Charges, you will have to type in the value you want to search for. I will select all Total Charges that are less than \$500. This report also has similar filtering and sorting options as the Selected Edit Flag Report, which I covered earlier. Now once you are finished, you will click “filter” to create the report.

Once you get to the selected data element report, you can utilize the same features I mentioned regarding the Selected Edit Flag Report. You can sort the data element by ascending or descending order. You can also click the filter button to further modify the report or click reset to start a new report. Further, you can print or export the report to a spreadsheet.

The last feature I’m going to show you today is the Data Distribution Report or DDR, which is located under “Other Report Information.” The DDR shows the distribution of data within each data element for a given report. This is a useful tool to view the data submitted and look for any errors in reporting. In addition, facilities can compare with prior DDRs to identify trends in the data.

Conclude

To recap, I have given you an overview of the summary reports and shown you how to manually correct records, create custom reports, and access the DDR. This concludes the training video. You can find more information in our online Quick Guides and in the Edit Flag Description Guide. If you have any questions, please feel free to reach out to your User Account Administrator or your assigned analyst. Thank you again for watching this presentation.