Reviewing the Dashboard and Submitting Data

Intro

Hello everyone. Welcome to the third video in our SIERA training series. In this video we'll cover the report dashboard, how to upload a file, and how to manually enter records.

Home Page

You are currently looking at the Home Page for the SIERA system. 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.

On the Home Page, you may view the data type, report period, and status for the facilities that you are associated with. For the purposes of this training, we want to dive a little deeper and go into a report. I am going to choose Adventist Health and Rideout's emergency department for the report period that ends 9/30/2020 and take you into the report dashboard. To do that you simply click on the report period.

Report Dashboard

This is our report dashboard. It is a combination of our main error summary and error reports pages that are in MIRCal. Here at the top, you will see the report type, report period, due date, and status. At the top right, you will see your OSHPD ID number. We have also highlighted the data and report status in the salmon colored box. It is always important for you to know the status of your report.

On this page, you will have two ways to submit your facility's patient data. Option 1 gives you the ability to upload and validate your patient data file. Option 2 gives you the ability to manually enter or correct records, and you can also validate your data at any time if corrections are made. Later in the video, we'll cover in more detail how to submit your data.

Now let's look at the Report Validation Summary. This section shows the results of your data submission. It will display the total number of records and will identify, with either a green checkmark or red X, whether the data passed or failed each edit program. You will see a breakdown of our edit programs based on report type. For example, inpatient reports will also display a licensing check and readmission edits.

Within each edit program, there will be additional high-level results. For example, for standard edits, you will see records with fatal, critical, and warning flags, as well as the number of total errors. Next to each edit program, there will be a summary link that will take you to a more detailed view of that edit program's results.

On the righthand side, you will see Other Report Information, such as the Data Distribution Report. You will also see the Selected Edit Flag and Selected Data Element Reports. These new functions give you the ability to create custom reports based your facility's data rather than submitting a request to your OSHPD analyst to create them for you. This functionality was requested by facilities in our surveys, and we are really excited to include it in the new system.

Below Other Report Information, you will see Attachments & Posted Reports. If your analyst or other OSHPD staff have special reports to share with you, they will be posted here. This functionality also allows you to attach custom reports or other special documents.

Lastly, at the bottom of the page, you will have the ability to formally submit and certify your report. The Submit Report button will be activated after the full report period has passed, your data is below the 2% error tolerance level, and all fatal and critical flags have been corrected.

<u>Submit Data</u>

Now that we've covered the dashboard, let's review how to submit your data.

The first option is to upload and validate your file. You will click on Choose File, select the appropriate file, and click open. The file name will then appear. At this point, you'll want to make sure that you have selected the correct file. If you mistakenly chose the wrong file, just start the process over again by clicking choose file. Once you have confirmed that you have the right file, click the Upload & Validate button. The file is then processed, and you will see the validation results below.

The second option to submit your patient data is to manually enter records. To do this, you will click the Enter/Correct button. Now we are at our Record Listing page. This page displays the records in a grid layout, gives you the ability to add records in bulk, and allows you to filter your data.

To add a new record, click on the "Add New Record" button. This will populate a blank row at the end of all existing records. You will then be able to fill out the blank fields. Some of the data element fields have dropdowns which display the values of the data element, and some are text fields, so you are able to type in the value. The dropdowns were included where possible to make it easy and convenient for you to complete.

After you are finished manually entering records, you will need to save your changes. You can also validate your data by clicking on the "Validate" button.

The default layout for the records is sorted by sequence number. However, there is a filter button on this page that gives you the ability to sort and filter your data by Data Element and Value. This feature will help you locate groups of records that may need to be researched or corrected. The reset button resets the filter on the data. You can also export all the data to an Excel file, or only the data that is currently being filtered.

We've been looking at the grid view for adding or correcting records. However, you can also click on the edit link on a new or existing record, which will take you to our record detail page. The Record Detail page gives you a vertical view of the record, which looks similar to the way we used to add and correct records in MIRCal. You can input your data and then save by clicking Save & Add New Record. This will save the current record and also bring up a new blank form. You can click "Save and Validate" to save the current record and validate it or click "Save" to save the records without validation. Lastly, you have the option to delete the record.

Conclusion

To recap, I have given you an overview of the Report Dashboard and shown you how to upload and validate a file and manually enter records. This concludes the training video. You can find more information in our online Quick Guides. If you have any questions, please feel free to reach out to your User Account Administrator or your assigned analyst. Thank you again for attending this presentation.