# The Recognizing Excellence Audit Tool Users Guide

## Introduction

This Guide provides information that will help you use the Recognizing Excellence Audit Tool.

Contact Information:

Tracy Krech, 651-662-3627, toll free 800-382-2000, ext. 23627, or email, RecognizingExcellence@bluecrossmn.com

## Index

## Navigation on the screens

**Using the Mouse:**

To make a selection, click on a button or the corresponding yes/no check box. Use the scroll bar on the right hand side of the audit form to view the bottom portion of the audit forms.

**Caution:** If you have a mouse with a **scroll button**, the scrolling function has been disabled while using this tool. This will not affect any other programs you use.

**Using the Keyboard:**

Pressing the **TAB** key will allow you to move from one selection button to the next button or from one data cell to the next cell. In order to make a selection while using the keyboard, press the **SPACEBAR**. Pressing the spacebar on the active field or button will put a check in a yes/no box or enact the button that is active.

The Page Up and Page Down keys will allow you to view the upper and lower portions of the audit form.

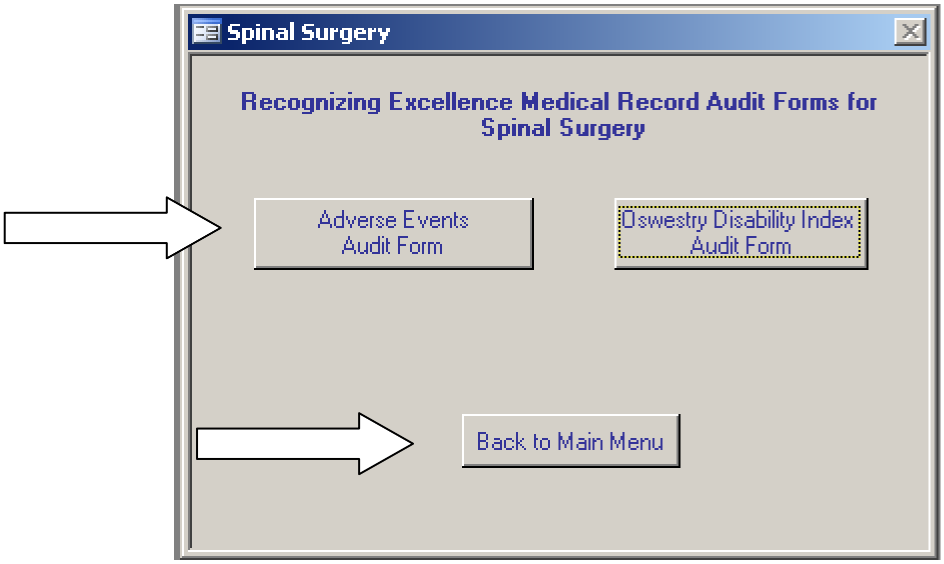
## Introduction Screen and Navigating to an Audit Form

1. Open the Rec Excellence 2011 Audit tool from the location where it was saved during installation.
2. Select the appropriate specialty to access the audit forms**.**
3. Later in the process, you may select two additional options from the Introduction Screen: "View Summary Report" and "Click Here to Export Data".

Below is how the main menu (Introduction Screen) appears. As an example to navigate through the tool, we will select Spinal Surgery.

**Navigating to an Audit form (continued)**

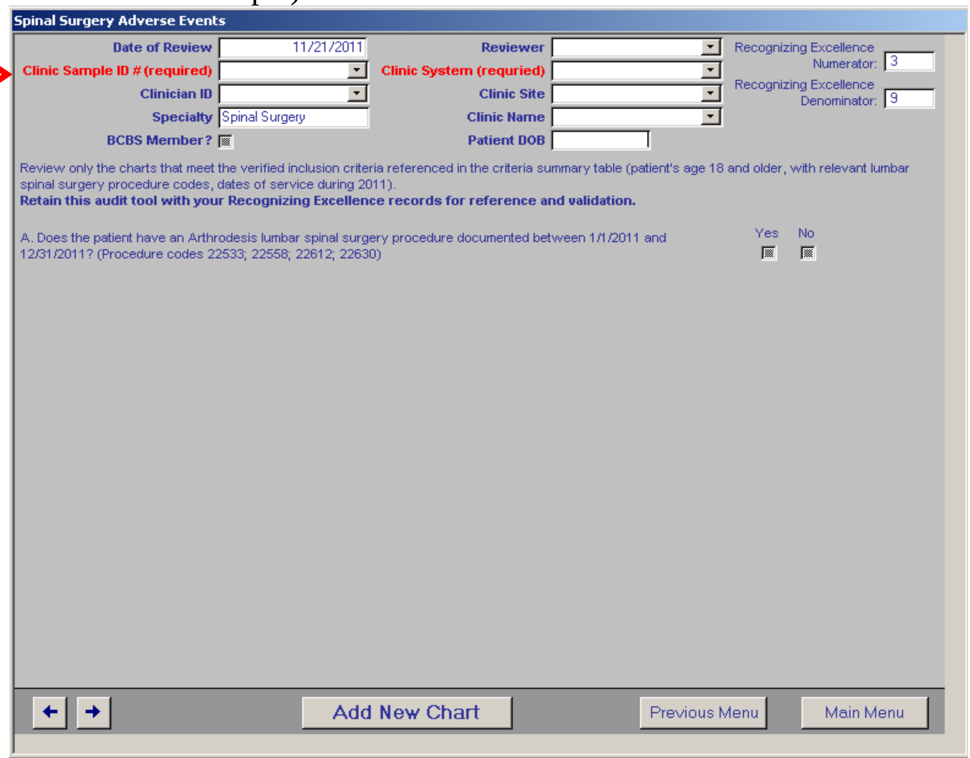
If Spinal Surgery is selected in the Introduction Screen, the following screen will appear:



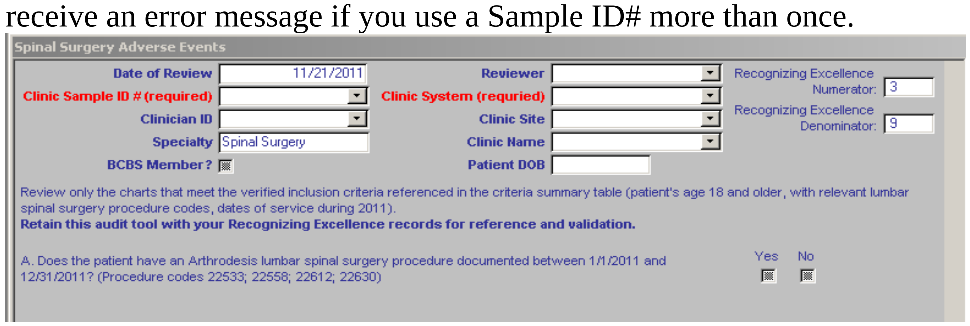

Selecting one of the buttons such as "Adverse Events Audit Form" will open the audit form to a new record that will be used to enter a new chart audit. The "Back to Main Menu" button will return you to the Introduction Screen.

## Filling out the Audit Forms

Once you have selected the appropriate audit form to work on, you will see a screen similar to the one below ("Spinal Surgery Adverse Events" is shown as the example).




Please type in the Reviewer, Clinic Sample ID# (required field), Clinic System (required field), Clinician ID, Clinic Site, Clinic Name, and Patient DOB. Then check the box if the patient is a BCBS Member. You are unable to change the date of the review and the specialty. You will receive an error message if you use a Sample ID# more than once.




The first question on most forms will be related to the patient's age. You can either type in the date of birth in the Patient DOB field, or if you know the age meets or does not meet the criteria, you can select Yes or No as the answer. Questions are automatically answered based on the patient's age, if you enter the Patient's DOB in the field provided.

**Please note:** You **cannot** enter the date of birth in the field box **and** click either the yes or no box. If you do this, the database will change your answer and it will be incorrect. Use **either** the Patient DOB field **or** the yes or no check boxes. Once the date of birth is entered, tab once to advance the tool to the next question. **Do not use BOTH the Patient DOB field AND the yes or no check boxes.**

## Filling Out the Audit Forms (continued)

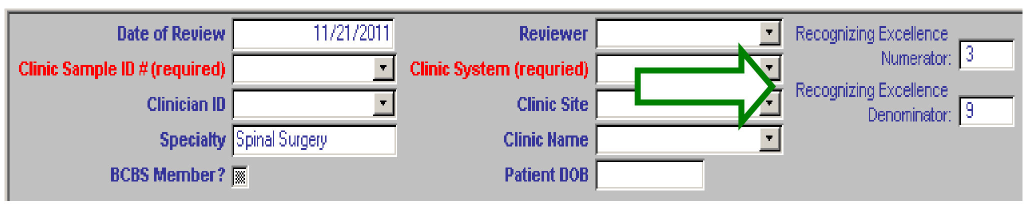
When the Reviewer, Clinic System, Clinician ID, Clinic Site and Clinic Name have been typed in once, they will appear for the remaining records for that measure in the drop down menu.  They will also auto fill when you start typing a name that has already been entered in that field once.

As questions are answered, additional questions will either pop up automatically or you will be prompted to pull a new record from the eligible population identified.

At the bottom of the page, there are **5 buttons** to assist you with the next action you wish to take.


You may add a new record by selecting "Add New Chart."  You can return to the previous menu by selecting "Previous Menu."  Or you can return to the main menu by selecting "Main Menu." The **right and left arrow keys** are used to navigate back and forth to previously completed records.  Please complete the record you are currently adding prior to using any of the navigation buttons.  The tool may prompt you to complete certain fields prior to you moving on to another record/menu.

After you have clicked on "Add New Chart," the audit tool will automatically calculate the numerator and denominator for the measure you are working on.  This information appears in the upper right hand corner of each form.



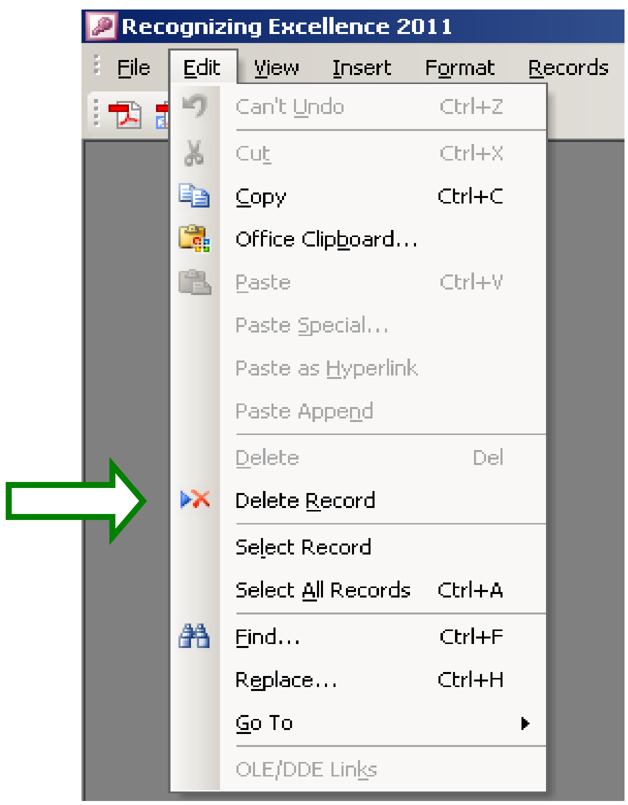
## Navigating to an Audit That Has Been Completed

If you go back and open the audit form after an individual chart audit has been completed, it will open to a new record by default. At the bottom of the audit form, there are **arrow buttons** that will allow you to view completed audits. Click on the left arrows to navigate to any previously completed audit. Use the right arrow to return to the current record.


If you need to make changes to a previously completed audit, please delete the record and then add it again. Below are the instructions on how to delete a record.

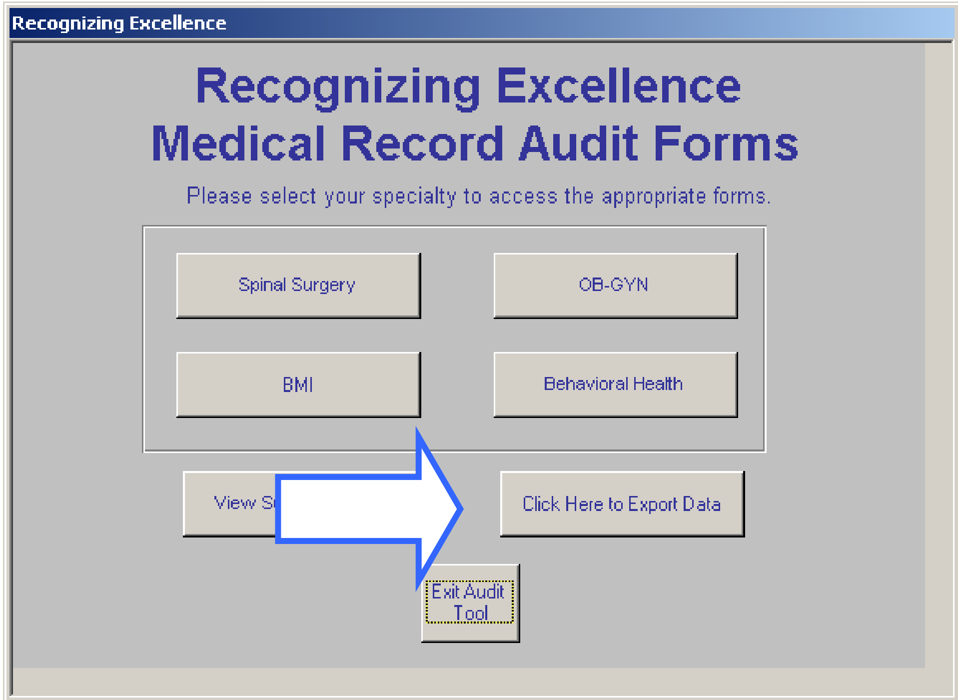
If a record appears blank between two completed records, this blank record will not impact the numerator, denominator or the outcomes report.

If you need to delete a record, select Edit at the top of the Access Audit tool and choose Delete Record. A warning box will appear asking if "You are about to delete 1 record(s)" choose "Yes". Call or email for further assistance. (Call Tracy at 651-662-3627, toll free 800-382-2000, ext. 23627, or email, RecognizingExcellence@bluecrossmn.com.)

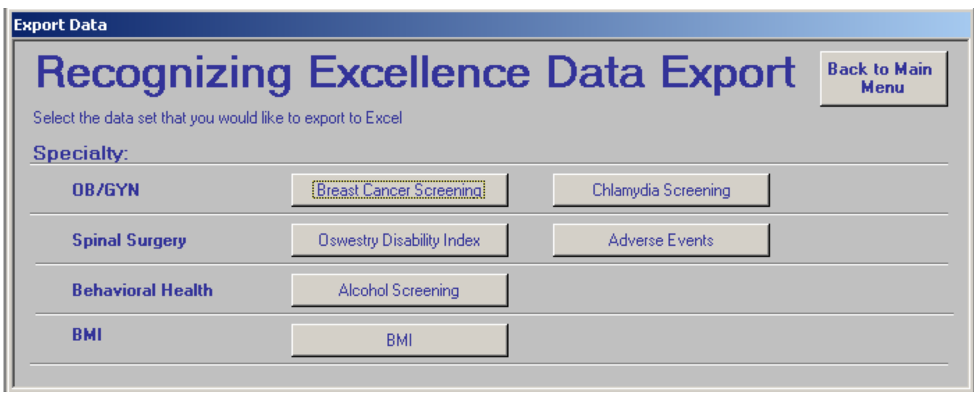


## Exporting Data

Your completed data files should be exported via the Introductory screen, by clicking on the "Click Here to Export Data" button.



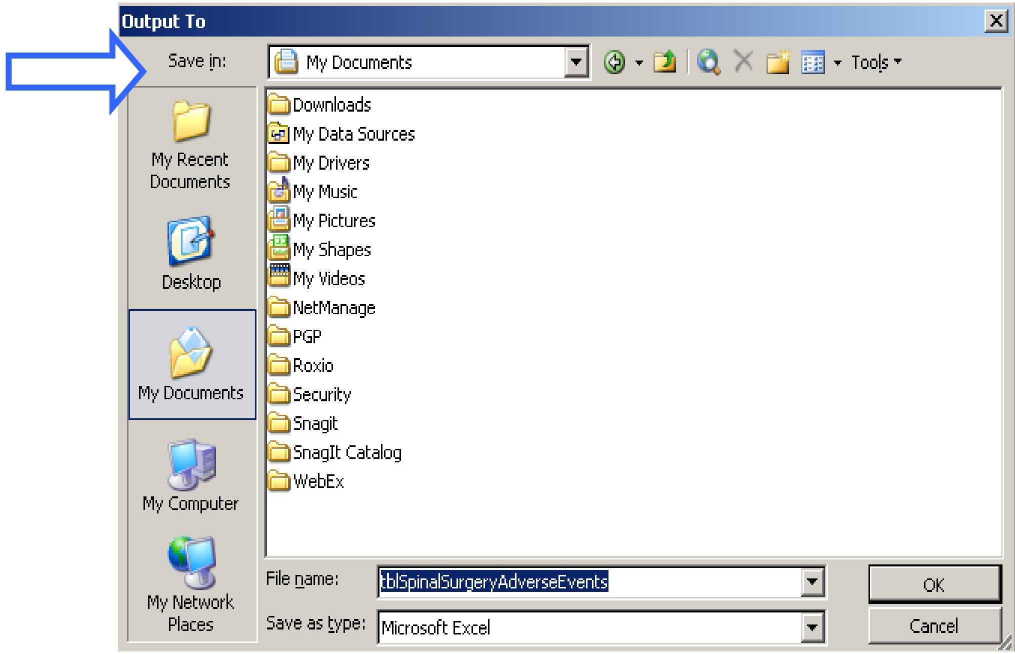

Clicking on this button will bring up the following screen:




Click on the data that you wish to export. You will be prompted to designate where the file is to be saved. A Microsoft Excel file will be created with the data from the tables and the file will open automatically.

## Exporting Data (Continued)

To save the data on your computer, select one of the buttons such as "Adverse Events" from the Data Export Menu.  When you do this, the following screen will appear:




Select where you would like to save the spreadsheet with your audit results by using the drop down arrow in the "Save In" box.  Once you have chosen where you would like to save the data, click the "OK" button. The file will be saved as the name of the audit form.xls (in this example the file would be "tblSpinalSurgeryAdverseEvents.xls").

By exporting the data and saving it into an excel spreadsheet, you will be able to review all of your completed forms and how each form was answered.  You will also be able to email Recognizing Excellence the saved spreadsheets.  **You will need to email the exported spreadsheets for all of the measures you are reporting.  Please see the section on "Submitting the Data" for more information on how to do this.**

## Outcomes Report

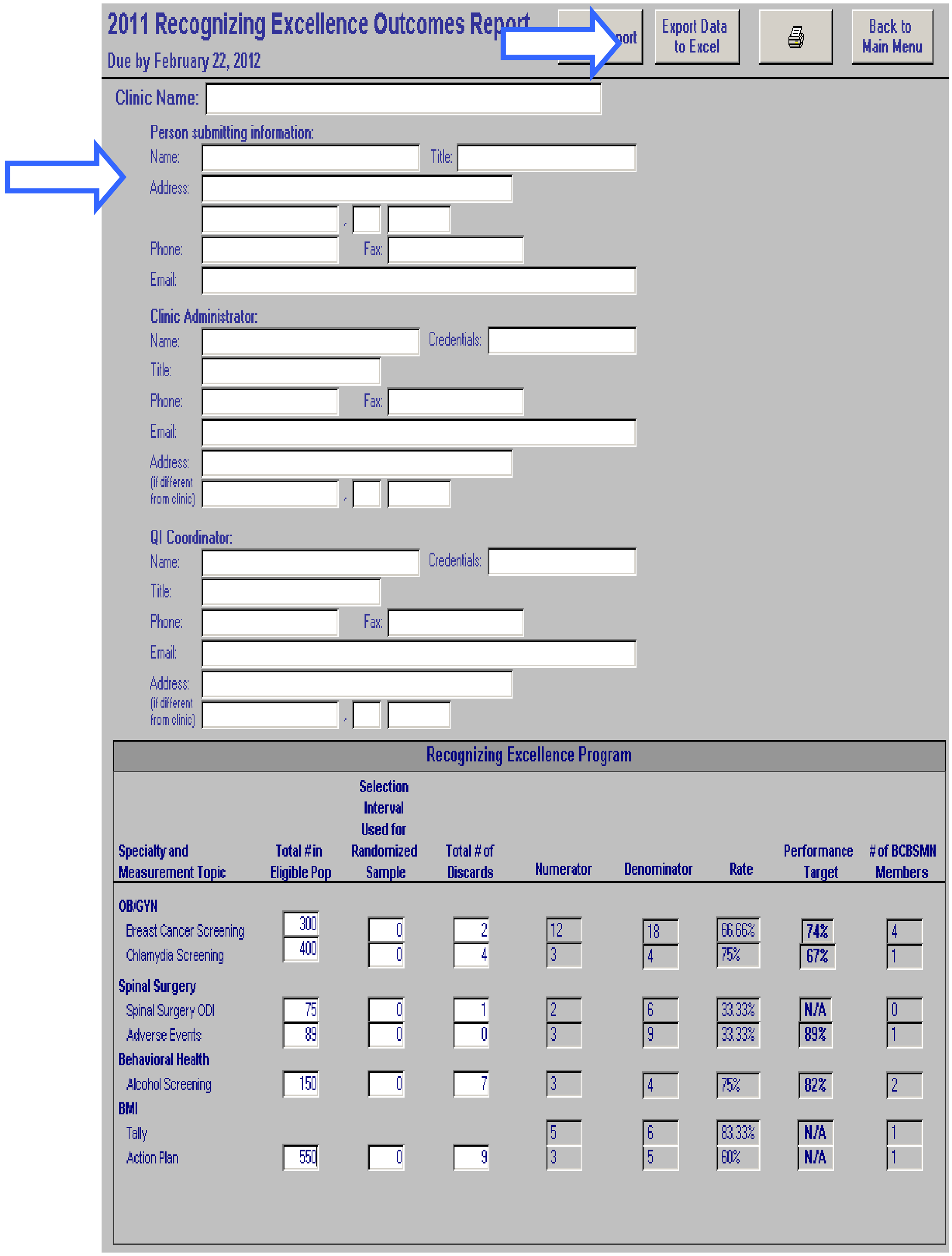
To get to the Outcomes Report, select "View Summary Report" on the Introductory Screen.


This will bring you to the "2011 Recognizing Excellence Outcomes Report" screen.

Below is the 2011 Recognizing Excellence Outcomes Report screen. Please complete all white areas of the form. You will be able to e-mail this report by selecting the "Export Data to Excel" button. Save the outcomes report to your computer. Then attach the file to the e-mail along with your other exported data files.

If you cannot e-mail this report you will be able to print the report by clicking on the printer icon button. Directions for emailing and printing the Outcomes Report are found in the Submitting the Outcome Report section that follows.

## Outcomes Report (Continued)



2011 Recognizing Excellence Outcomes Report

Due by February 22, 2012

port | Export Data to Excel | Back to Main Menu

Clinic Name:

Person submitting information:

Name: Title:

Address:

Phone: Fax:

Email:

Clinic Administrator:

Name: Credentials:

Title:

Phone: Fax:

Email:

Address:
(if different from clinic)

QI Coordinator:

Name: Credentials:

Title:

Phone: Fax:

Email:

Address:
(if different from clinic)

Recognizing Excellence Program

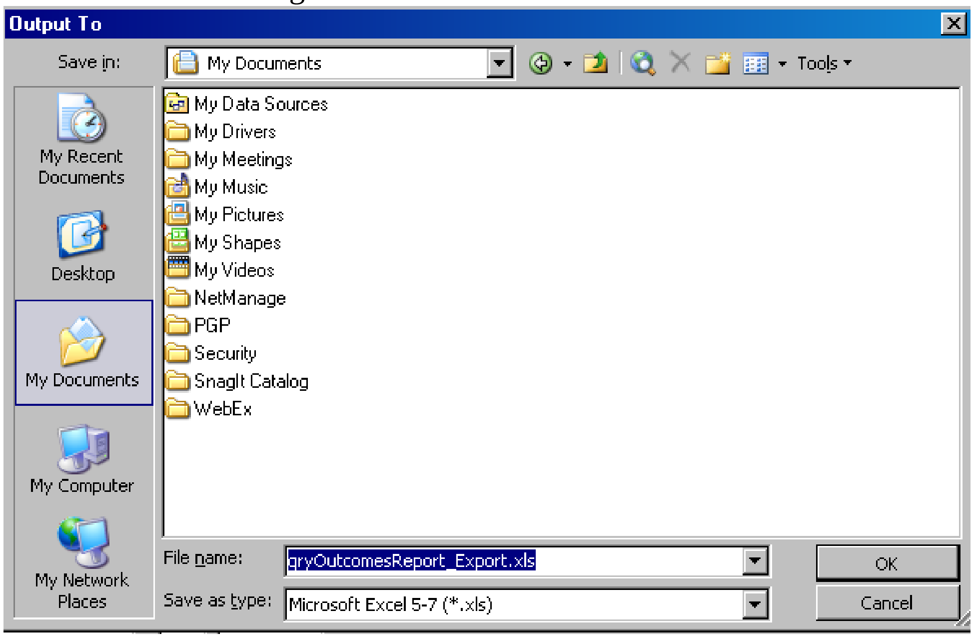
| Specialty and Measurement Topic | Total # in Eligible Pop | Selection Interval Used for Randomized Sample | Total # of Discards | Numerator | Denominator | Rate | Performance Target | # of BCBSMN Members |
|---|---|---|---|---|---|---|---|---|
| **OB/GYN** | | | | | | | | |
| Breast Cancer Screening | 300 | 0 | 2 | 12 | 18 | 66.66% | 74% | 4 |
| Chlamydia Screening | 400 | 0 | 4 | 3 | 4 | 75% | 67% | 1 |
| **Spinal Surgery** | | | | | | | | |
| Spinal Surgery ODI | 75 | 0 | 1 | 2 | 6 | 33.33% | N/A | 0 |
| Adverse Events | 89 | 0 | 0 | 3 | 9 | 33.33% | 89% | 1 |
| **Behavioral Health** | | | | | | | | |
| Alcohol Screening | 150 | 0 | 7 | 3 | 4 | 75% | 82% | 2 |
| **BMI** | | | | | | | | |
| Tally | | | | 5 | 6 | 83.33% | N/A | 1 |
| Action Plan | 550 | 0 | 9 | 3 | 5 | 60% | N/A | 1 |

## Submitting the Outcomes Report

The Recognizing Excellence Measurement Outcomes Report summary should be emailed to RecognizingExcellence@bluecrossmn.com, faxed to Tracy Krech at fax 651-662-0015 or mailed to:

Blue Cross Blue Shield of Minnesota
Attn: Tracy Krech/R259
P.O. Box 64560
St. Paul, MN 55164-0560

In order **to email the report**, after clicking on the "Export Data to Excel" button found on the Outcomes Report screen, you will see something similar to the following menu:




Select where you would like to save the spreadsheet with your audit results by using the drop down arrow in the "Save In" box. Once you have chosen where you would like to save the data, click the "OK" button.
The file will be saved as the name of the "qryOutcomesReport_Export.xls"

By exporting the data and saving it into an excel spreadsheet, you will be able to email RecognizingExcellence@bluecrossmn.com the saved spreadsheet.

If you do not have the ability to e-mail the outcomes export, please **print** out the report (by returning to the Outcomes Report and selecting the printer button) and fax or mail the report as detailed above.

## Submitting the Data

All of the exported data files should also be submitted for each measure you are reporting.

The data should be exported for each measure to a Microsoft (MS) Excel spreadsheet following the instructions on Page 8 and 9. Please send the MS Excel spreadsheets directly to Recognizing Excellence via **email** RecognizingExcellence@bluecrossmn.com.

## Questions

If you have **additional questions**, please contact Tracy Krech at (651) 662-3627, toll free at 800-382-2000 ext. 23627, or email, RecognizingExcellence@bluecrossmn.com.

**Thank you.**