PA V5 Outcomes Registry

PTSF CONFERENCE - FALL 2018
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Objectives – Admin and Setup

- Introduction to the PA V5 Outcomes Registry
- Overview of the software
- PA V5 Outcomes Registry – Admin Module
  - Users, Roles, and Accounts
  - Menu Catalog
- PA V5 Outcomes Registry – Registry Module
  - PA V5 Interface Setup and Other Setup
  - Running the PA V5 Interface
Objectives - Registry

- Record Manager Highlights
  - Multi-Select Records and Browse Feature
  - Advanced Search

- Introduction to the PIPS/Outcomes Module Screens
  - Identified Issues and Objective Summary
    - Auto Trigger Events
  - Case Management
    - Generate Summary
    - Case Printout Summary

- Meetings
  - Load/Save Defaults
  - Related Issues
  - Linking to Related Documents

- Tracked Events
  - Taxonomy Fields and Controls
  - Copy/Paste Events
  - Add Reminder to Calendar
Objectives – Outcomes

- Introduce the PIPS/Outcomes Module Screens
  - Outcomes Summary
  - Referrals

- Reporting
  - Standard Reports Review
  - RDE Package Review
Process Improvement

Overview
PIPS - Improvement Cycle

- Identify (Domain)
- Determine/Plan (Impact/Type/Factors/Determination)
- Change (Action)
- Follow-Up (Loop Closure)
- Measure/Monitor (Benchmarking/Reporting)
Overview of the PA V5 Outcomes Registry

PTSF Trauma Program: High Level Solution Pictorial

TRAUMA CENTER

PTSF CENTRAL SITE WEB PORTAL

PTOS Central Site w/ DI Report Writer

TRAUMA CENTER

PTOS Central Site w/ DI Report Writer

TRAUMA CENTER

PA v5 Outcomes Registry w/ DI Report Writer

TRAUMA CENTER

POPIMS Central Site w/ DI Report Writer

TRAUMA CENTER

POPIMS Central Site w/ DI Report Writer

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POPIMS Central Site w/ DI Report Writer

TRAUMA CENTER

PTOS Central Site w/ DI Report Writer

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PTOS Central Site w/ DI Report Writer

TRAUMA CENTER

PTOS Central Site w/ DI Report Writer
Admin Module & Registry Module Setup
PA V5 Outcomes Registry – Admin Module

- Creating an Account in the PA V5 Registry is very similar to creating an Account in PTOS.

- Each Account requires the following items:
  - User or User ID
  - Password
  - Facility Association
  - Role/Permissions
PA V5 Outcomes Registry – Admin Module

- Menu Catalog contains menus displayed throughout the PA V5 Registry
  - Users have the ability to Sort, Hide, or Add new Menu Choices
PA V5 Outcomes Registry – Admin Module

User Defined Issues

• Recommended Use – User Defined Issues should be reserved for hospital or program specific clinical practice guidelines variances (CPGVs).

• For any other hospital event or opportunity for improvement, use the existing PI codes already configured in the PA V5 registry.
  • NOTE: If User Defined Issues are used instead, these events cannot be reported to PTSF for death cases.

• Reserved Code Range: 10000-19999
User Defined Issue Setup – Steps:

1. In the Admin Module, select the option **Menu Catalog** from the **Setup** menu.

2. Select the menu **PIPS – User Defined Issue** from the list of menus.

3. Select **Add** to add the desired CPGV and assign a code value from 10000-19999. Click **Add** then **Save/Close** to complete the process.

4. Other CPGVs can be added at this time. When completed, click **Close** from the Menu Catalog Record Manager.

Run the **Menu Catalog Processor** from the **Setup** menu after completing any edits to menus.
PA V5 Outcomes Registry – Registry Module Setup

- PA V5 Interface
  - Users **MUST** set up the PA V5 Interface in the *User System Setup* screen in the **Registry Module**
    - Simplified set up of the Interface
    - Enter/Find the PTOS Registry path
    - Enter the Interface Start Date – **1/1/2018 or later**

<table>
<thead>
<tr>
<th>PTOS Interface</th>
<th>PTOS Trauma Registry Directory C:\temp\1Apps\PTSF_Trauma\PTOS\sv4truma\SERVER\cvw</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interface Start Date</td>
<td>01/01/2018 [ ]</td>
</tr>
</tbody>
</table>
PA V5 Outcomes Registry – Registry Module Setup

- PA V5 Interface
  - DI strongly recommends the PA V5 Interface be configured to executed by a Windows Scheduled Task.
    - Please consult your IT Department for more details about Windows Scheduled Tasks.
  - A log file is created every time the PA V5 Interface is executed.
    - The log file can be accessed from the File → View Interface Log option.
PA V5 Outcomes Registry – Registry Module Setup

- PA V5 Interface
  - Manual Execution
    - From the File menu, select Run Interface
    - NOTE: The PA V5 Interface will automatically exit if the processing is successful.
PA V5 Outcomes Registry – Registry Module Setup

- Over/Under Triage Report Setup
  - Users **MUST** review and configure the Activation Levels for the Over/Under Triage Reports

![Over/Under Triage Report Setup](image)
PA V5 Outcomes Registry – Registry Module Setup

- Over/Under Triage Report Setup

- Example:
  - If your trauma program only uses the following activation levels:
    - 1, Highest (Full Activation)
    - 2, Second Level (Partial Activation)
    - 3, Lowest Level (Specialty Activation – e.g. Neurosurgery only, Orthopedics only)
    - 4, Trauma Consult (Trauma Consult Only)
  - And wants to group activations in the Over/Under Triage Reports as follows:
    - Highest – Full Activations
    - Second Highest - Partial Activations and Specialty Activations
    - Consult – Trauma Consults Only
PA V5 Outcomes Registry – Registry Module Setup

- Over/Under Triage Report Setup

- Adjust the setup as follows:
  - 3, Lowest Level should be set to the Category Value of 2, Second Highest.
  - 4, Trauma Consult should be set to the Category Value of 3, Consult.
PA V5 Outcomes Registry – Registry Module Setup

- Referral Contact Manager is located in the PA V5 Registry
  - Contact information includes Name, Salutation, Facility/Agency and Address information.

**NOTE:** DI Support will assist in migrating all applicable Referral Contacts during the PA V5 installation process.
PA V5 Outcomes Registry – Registry Module Setup

- **User System Set Up**
  - This screen allows the user to configure specific menus and the default arrival date search in the Record Manager.
  - This screen also provides the setup for the PA V5 Interface.
Record Manager Highlights
Record Manager Highlights

Multi-Select Records

- The Trauma Record Manager has been updated to support the selection of multiple records for viewing or editing.

- Multi-Select Records can be used with Edit or View options from the Trauma Record Manager.
- Delete and Print from the Record Manager window are not supported with multi-select records.
Record Manager Highlights

Selecting Records

- **Shift-Mouse** – Using the mouse and holding down the shift key, a range of records can be selected by clicking on the first and last record desired in the range.
Record Manager Highlights

Selecting Records

○ Ctrl-Mouse – Using the mouse and holding down the Ctrl (control) key, records can be selected one by one.
Record Manager Highlights

Selecting Records

- **Select All Button** – Selects all records listed in the Trauma Record Manager window.
- **Select None** – De-selects all records listed in the Trauma Record Manager window.
Record Manager Highlights

Selecting Records

- Invert Selection – Any records previously selected are de-selected and all other records are selected.

Once multiple records are selected, click the Edit or View buttons to activate Browse Mode in data entry.
Record Manager Highlights

Browse Mode
- Allows viewing or editing of multi-selected records without the need to return to the Trauma Record Manager to access another record.
Record Manager Highlights

Using Browse Mode

- Radio Buttons found above the status bar in the data entry window can be used to navigate from one record to another.
- Shortcut keys and menu options under the Browse pull down menu can navigate from one record to another.
- Navigation Buttons/Shortcut Keys/Options:

<table>
<thead>
<tr>
<th>Radio Button</th>
<th>Shortcut Key</th>
<th>Menu Option</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="arrow_next.png" alt="Next" /></td>
<td>Ctrl-PgDn</td>
<td>Next Record</td>
<td>Loads the next record selected</td>
</tr>
<tr>
<td><img src="arrow_previous.png" alt="Previous" /></td>
<td>Ctrl-PgUp</td>
<td>Previous Record</td>
<td>Loads the previous record selected</td>
</tr>
<tr>
<td><img src="arrow_last.png" alt="Last" /></td>
<td>Ctrl-End</td>
<td>Last Record</td>
<td>Loads the last record selected</td>
</tr>
<tr>
<td><img src="arrow_first.png" alt="First" /></td>
<td>Ctrl-Home</td>
<td>First Record</td>
<td>Loads the first record selected</td>
</tr>
</tbody>
</table>
Record Manager Highlights

Navigating Records

- When navigating from one record to another, if changes are not saved, you will be prompted to save changes or return to the record.
  - Click Yes to save changes and load another record.
  - Click No to discard changes and load another record.
  - Click Cancel to return to the unsaved record.
Navigating Records

- When navigating from one record to another while editing records, if the record being loaded is open for editing by another user, you will be notified and the record will be displayed in view only mode.
  - Click OK to continue.
Navigating Records

- When navigating from one record to another while editing records, if the record being loaded has been renumbered or deleted, you will be notified that the record is no longer available.
  - Click OK to continue.

- The next or previous available record will load.
Exiting Browse Mode

- Click Save and Exit or click Close to exit Browse Mode and return to the Trauma Record Manager window.
Record Manager Highlights

Advanced Search – Advanced search capability has been added to the Trauma Record Manager window.
Record Manager Highlights

Advanced Search supports searching by the following fields:
- PTOS Record
- Flagged Reason
- Occurrence
- Tracked Event
- Meeting Type
- Meeting Name
- Meeting Date
- Loop Closure Status
- Loop Closure Date

In addition, PA V5 Report Writer user defined queries (except Across Queries) can be used for searching.
Record Manager Highlights

Applying Search Criteria:

- Multiple search criteria selected/defined will only select records that meet all criteria.

Example: Trauma patients arrived since 6/1/2018 that will be reviewed in the next trauma multidisciplinary review on 9/1/2018.
Using PA V5 User Defined Queries

- In the Advanced Search tab, any user defined query in the PA V5 Report Writer can be used to search for records.
  - **NOTE:** Queries that are defined using Across fields and tables will not work with Advanced Search.

Example: Deaths within the last 90 days from today. - DTH_WITHIN_90DAYS
Introduction the PIPS/Outcomes Module Screens

Patient Summary

- Patient Information – Summary of Patient Record
- Response Times – Resuscitation Team Responses
- Procedures – List of All Recorded Procedures Performed
- Diagnosis – List of Patient Injury Diagnosis Recorded

- Highlighted fields indicate information sent to the PA V5 Outcomes Central Site.
- Audit Log information available from Audit Log Button in the Patient Information tab.
### Trauma Data Editor

**Patient Information**
- **Facility**: 9999
- **Trauma H**: 201 59278
- **PTOS Patient**: Y
- **PTOS Trauma Registry Status**: Closed
- **Patient Name Last**: First
- **Date of Birth**: 03/29/1966
- **Gender**: M
- **Injury**: 06/21/2018
- **Cause of Injury**: Motorcycle rider involved in collision with car, pick-up truck
- **Primary Mechanism**: VE 4059
- **Injury Type**: Blunt
- **Scene**: EMS
- **Transport**: EMS
- **Referring Facility**: EMS

**Entry Details**
- **Entered ED**: 06/21/2018
- **Init Level of Alert**: 1
- **Trauma Alert Change**: No change
- **Initial Assessment**
  - **Intubated?**: N
  - **Resp Rate Controlled?**: N
  - **Unassisted RR**: 22
  - **Pulse**: 100 SBP: 120

**Discharge Status**
- **Discharge Status**: Alive
- **Discharge Date/Time**: 06/23/2018 12:15
- **Discharged To**: Home
- **Comment**: 
- **Total Days in Hospital**: 1

**Diagnosis**
- **ISS**: 14
- **TRISS**: 0.95
- **Burn, 2nd**: N
- **3rd**: N
- **Tot**: P[6]
- **All**: P[6]

**External Information**
- **Diagnosis**: ISS 14, TRISS 0.95, Burn, 2nd, 3rd, Tot, P[6], All P[6]

**Additional Details**
- **Arrival**: 06/21/2018
- **Trauma Number**: 201 59278
- **MRN**: 1 of 13

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Introduction the PIPS/Outcomes Module Screens

Audit Log – Indicates audit information summarizing edits and other transactions with the Outcomes record.
<table>
<thead>
<tr>
<th>ICD 10</th>
<th>Procedure</th>
<th>Location</th>
<th>Op.</th>
<th>Date</th>
<th>Time</th>
<th>Service</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bw232zz</td>
<td>Computed Tomography</td>
<td>Radiology</td>
<td></td>
<td>06/21/2018</td>
<td>18:15</td>
<td>Trauma Service</td>
<td></td>
</tr>
<tr>
<td>Bw232zz</td>
<td>Computed Tomography</td>
<td>Radiology</td>
<td></td>
<td>06/21/2018</td>
<td>18:15</td>
<td>Trauma Service</td>
<td></td>
</tr>
<tr>
<td>Bw232zz</td>
<td>Computed Tomography</td>
<td>Radiology</td>
<td></td>
<td>06/21/2018</td>
<td>18:15</td>
<td>Trauma Service</td>
<td></td>
</tr>
<tr>
<td>Bw232zz</td>
<td>Computed Tomography</td>
<td>Radiology</td>
<td></td>
<td>06/21/2018</td>
<td>18:01</td>
<td>Trauma Service</td>
<td></td>
</tr>
<tr>
<td>Bw232zz</td>
<td>Computed Tomography</td>
<td>Radiology</td>
<td></td>
<td>06/21/2018</td>
<td>18:01</td>
<td>Trauma Service</td>
<td></td>
</tr>
<tr>
<td>ICD 10</td>
<td>Description</td>
<td>Predeli</td>
<td>Severity</td>
<td>ISS Body Region</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------</td>
<td>----------</td>
<td>-----------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Concussion with loss of consciousness of NOS, duration, initial encounter</td>
<td>16102</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Multiple fractures of leg, left side, initial encounter for closed fracture</td>
<td>45623</td>
<td>3</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Traumatic pneumothorax, initial encounter</td>
<td>44220</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Other injury of unspecified body region (Fat 370)</td>
<td>81820</td>
<td>1</td>
<td>6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
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<td>11</td>
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<td>12</td>
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<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Objective Summary and Identified Events Tab

- Objective Summary details are now provided in view screens in addition to being able to generate the Objective Summary as a word document.
- A summary tab of all identified events (occurrences, comorbid, PTSF audit filters) and whether a specific identified event has been triggered for tracking in the record has been added.

<table>
<thead>
<tr>
<th>Identified Events/Outliers</th>
<th>Patient Info and Prehospital</th>
<th>ED/Resus</th>
<th>ICU/IR</th>
<th>Floor/Ward/Discharge</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identified Events from the Trauma Registry</td>
<td>Event</td>
<td>Occurrence Date</td>
<td>Triggered</td>
<td></td>
</tr>
<tr>
<td>Hypertension</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diabetes Mellitus</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arthritis</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Field scene time &gt; 20 minutes</td>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PIPS – Identified Events/Outliers

Identified Events Tab

- Trigger column indicates whether the identified event has been triggered in the tracked events tab.

<table>
<thead>
<tr>
<th>Event</th>
<th>Occurrence Date</th>
<th>Triggered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hypertension</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Anticoagulation for Retired</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Obesity</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Advanced Directive Limiting</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Functionally Dependent Health</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Death</td>
<td>06/26/2018</td>
<td>Yes</td>
</tr>
<tr>
<td>Aspiration/Aspiration Pneumonia</td>
<td>06/23/2018</td>
<td>Yes</td>
</tr>
<tr>
<td>CVA</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PIPS – Identified Events/Outliers

Identified Events Tab

- Click the Auto-Trigger button to select identified events to be tracked.
PIPS – Objective Summary

Objective Summary Tab
- **Patient Information**
- **Prehospital**
PIPS – Objective Summary

Objective Summary Tab
- ED/Resuscitation
- ED Procedures
- Consults
PIPS – Objective Summary

Objective Summary Tab
- ICU Procedures
- Step Down Procedures
- OR Procedures
PIPS – Objective Summary

Objective Summary Tab
- Floor/Ward
- Other Procedures
- Discharge
Outcomes Module

Case Summary – Provides a summary of the patient (Case Summary Memo) and Case Management memo available for PI/Case Management notes.

Case Summary Generate Button – Generates case summary. Can be edited once generated.

Objective Summary Generate Button – Creates an objective summary in a single MS Word document.

Case Printout Generate Button – Creates a complete case printout of the Outcomes record in a single MS Word document.
Outcomes Module

Objective Summary – MS Word Document

<table>
<thead>
<tr>
<th>Record #: 020170001</th>
</tr>
</thead>
</table>

**DEMOGRAPHICS**
- Initial: ps Age: 68 years old, DOB: 01/01/50, Gender: Female

**COMORBIDITIES**
- 0.00, None

**DIAGNOSIS**
- RUPTURED SPLEEN

**OCCURRENCES**

<table>
<thead>
<tr>
<th>Event</th>
<th>Response</th>
<th>Occurrence Date</th>
<th>PI Track</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encapsulated Intubation (inhouse only)</td>
<td></td>
<td>07/01/18</td>
<td></td>
</tr>
</tbody>
</table>

**OUTLIERS**
- Filter 11B, Pt transferred OUT after 3 hrs from ED arrival

**PREHOSPITAL**
- Injury Date/Time: 07/01/18 at 11:00
- Cause of Injury: (None)
- Prehospital EMS: None
- Mode of Transport to Hospital: Private Vehicle
- Scene Vital Signs: HR, GCS, SBP, RR
- Intubated, Paralyzed
- Arrival at Hospital: 06/01/18 at 12:00
- Prehospital Procedures
  - Code Start Service Provider
  - Referring Facility Procedures
  - Code Start Service Provider
# Outcomes Module

## Case Printout – MS Word Document

### Record #: 029170001

**Medical Record #:** 4270001

**Account #:**

**Outcomes Case Status:** Active

<table>
<thead>
<tr>
<th>Medical Record Ed</th>
<th>Date of Service</th>
<th>Age</th>
<th>Gender</th>
<th>Race/Ethnicity</th>
<th>Height</th>
<th>Weight</th>
<th>Admitting Physician/Service</th>
<th>Admission Date/Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>029170001</td>
<td>01/01/2023</td>
<td>35</td>
<td>Male</td>
<td>White</td>
<td>180 cm</td>
<td>80 kg</td>
<td>Trauma Service</td>
<td>01/01/2023 23:59</td>
</tr>
</tbody>
</table>

**Admitting Physician:**

**Service:** Trauma Service

**Diagnosis:**

**Identified Events**

**Identified Events**

**Discharge Disposition:**

**Case Management**

**Case Summary:**

The patient was admitted to the hospital via Trauma Center on 01/01/2023. The patient was a second-level response level with a GCS score of 15 on the initial assessment. The patient was discharged from the hospital on 01/30/2023.

**Outcome Summary**

**Referrals**
Outcomes Module

Meetings – Document any formal meeting/discussion/review of the Outcomes record.
Meetings – Features:

- Use *Set Defaults* to set the default list of attendees and/or date for an upcoming meeting. Once set, the *Load Defaults* button will load the default list of attendees and date (if set) for other patients.
- Use Copy (Ctrl-C) and Paste (Ctrl-V) to copy/paste text from other documents into the discussion notes.
- Use F7 to activate spell check in the discussion notes.
Outcomes Module

Tracked Events – Records quantified evaluation/analysis of each tracked hospital event.
Outcomes Module

Tracked Events – Features:
- Copy/Paste – Copy information from one tracked event to another using the copy/paste buttons.
- Taxonomy Checkbox – Activates/deactivates expanded taxonomy analysis fields.
Outcomes Module

Tracked Events – Features:

◦ Add Reminder to Calendar – For open loop closure status with dates, adds a reminder based on the date provided in the loop closure date field.

◦ Meeting – Related Issues
  ◦ The Related Issues summary for each meeting is linked by indicating the Meeting/Reviewed By Meeting Type and Meeting Date.
  ◦ If both the Meeting Type and Meeting Date match a meeting entered in the Meeting section, the Related Issues summary will list the Tracked Event.
Outcomes Module

Outcome Summary

[Image of Outcomes Module interface]
Outcomes Module

Referrals
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
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<tr>
<td>Referral Date</td>
<td>10/08/2018</td>
</tr>
<tr>
<td>Referral To</td>
<td>James Pou</td>
</tr>
<tr>
<td>Telephone</td>
<td>444 444-4444</td>
</tr>
<tr>
<td>Address</td>
<td>Digital Innovation, Inc. 302 Dove Court Forest Hill MD 21050</td>
</tr>
<tr>
<td>Salutation</td>
<td>Dear Mr. Pou:</td>
</tr>
<tr>
<td>Related Issues</td>
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<tr>
<td>Referral Comments</td>
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<tr>
<td>Replied</td>
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<tr>
<td>Reply Date</td>
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<tr>
<td>Template Letter</td>
<td></td>
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<tr>
<td>External Letter</td>
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</tr>
<tr>
<td>Generate</td>
<td></td>
</tr>
<tr>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>
Outcomes Module

Referral Fields

- **Referral Date** – Enter the date that the referral or communication occurred for the case.
- **Referral To** – Enter the name of the individual that the referral or communication is being sent to.
- **Salutation** – Enter the word or phrase of greeting you would like to begin the referral letter with.
- **Telephone** – Enter the phone number for the referral contact.
- **Email** – Enter the email address for the referral contact.
- **Address** – Enter the full mailing address for the referral contact.
- **Related Events** – From the menu, select up to three events that are related to the referral or communication you are sending.
- **Referral Comments** – Enter the details/ specifics that are being included in the referral letter or communication. Select the [Referral Comments] button to display the text in a larger font for easier viewing and editing.
- **Replied** – Enter ‘Yes’ to indicate that a reply was received from the referral sent. Enter ‘No’ when no reply was received in regard to the referral.
- **Reply Date** – When Replied = Yes, enter the date that the reply was received from the referral contact.
- **Reply Notes** – Enter the details of the reply that was received. Click on the [Reply Notes] button to display the text in a larger font for easier viewing and editing.
- **Template Letter** – A pre-defined template letter may be created for this record. After selected, the name/location of the file path for the template letter is displayed in this field. See the sections on Template Letters under the Additional Features section of this document for complete directions on configuring and generating template letters.
- **External Letter** – From this field you can link a copy of the actual referral correspondence that was sent to the referral client. After linked, the name/location of the file path for the letter is displayed in this field.
Outcomes Module

Template Letters

Template letters can be generated from the following screens within the V5 Outcomes Module:
- Outcomes Module/Meetings – Meeting Detail Screen
- Outcomes Module/Outcome Summary
- Outcomes Module/Referrals – Referral Detail Screen

The template letter and reports feature uses functionality from
- V5 Trauma Registry
- Microsoft Word (Mail Merge)

Videos on Mail Merge from Microsoft:
- Mail Merge using an Excel Spreadsheet
- Use Mail Merge to Create and Send Bulk Mail, Labels, and Envelopes
- Mail Merge - Video Based Training
Outcomes Module

Closing Records – Record Validation and Close Process

- Before closing a record in the PA V5 Outcomes Registry, the record must already be closed in the PTOS Trauma Registry. The Patient Information screen will indicate the PTOS record status as shown below.
Outcomes Module

Closing Records – Record Validation and Close Process – Steps:

1. After completing data entry for a record, select the Check button to validate the data entered.

2. The Checks window will be displayed and contain information about any failed validation resulting from missing and/or invalid data. At this point, one of the following actions can be taken:
   a. Correct the data related to the check. Once corrected, an OK message will be displayed in the check window. Use the Next Check button to continue the validation process.
   b. Override the check using the Validate button. Once overridden, the validation process will continue. NOTE: Some checks cannot be overridden. For these checks, the Validate button will be disabled.

3. Once the validation process has been completed, a final confirmation message indicating all checks are OK will appear. At this point, one of the following actions can be taken:
   a. Close the record by selecting Yes.
   b. Leave the record open by selecting No.
Outcomes Module

Closing Records – Why?

• Ensures that the data recorded for the Outcomes review is complete and accurate.
• Ensures that minimum data has been recorded for submitting a death review to PTSF.
• Helps manage which Outcomes cases have been reviewed/completed versus which ones still need attention or have open items of concern.

NOTE: For a death case review to be submitted to PTSF, the following MUST be completed:

◦ PTOS Record = Yes
◦ PTOS Trauma Record Closed
◦ PA V5 Outcomes Record reviewed, validated using checks, and closed.
Submitting Cases to PTSF
Submitting Cases to PTSF PA V5 Central Site

PA V5 Initial Setup

In the PA V5 Admin Module, select the **Transfer Setup** menu option from the **Setup** menu.

![SDL Export Setup](image.png)
Submitting Cases to PTSF PA V5 Central Site

PA V5 Initial Setup

Complete the following fields on the screen:

a. **PTSF V5 Server Directory** – Select the folder icon next to this field to locate the SERVER folder in the CVSTRAUMA directory. This allows the SDL Engine to access the V5 Registry data model to complete processing and is required.

b. **PTSF v5 Facility Id** – Enter the PTOS Facility ID for your facility (e.g. 101). The facility ID is used to:
   i. Include the Facility ID in the file name.
   ii. Determine which records to select from the V5 Trauma Registry database.

c. **Central Site URL** – Enter the PTSF Central Site URL. (as of 12/2017 https://ptsf.centralsiteportal.com)

d. **PTSF v5 Submitting Facility Id** – Enter the PTSF Central Site Facility ID belonging to the account established in the DI Central Site Web Portal – Admin Module.

e. **User Id** – Enter the PTSF Central Site User ID belonging to the account established in the PTSF Central Site Web Portal – Admin Module.

f. **Password** – Enter the PTSF Central Site Password belonging to the account established in the PTSF Central Site Web Portal – Admin Module.
Submitting Cases to PTSF PA V5 Central Site

Example – Completed Setup:

To setup the PTSF download, navigate to the PTSF v5 Registry installation directory. Browse to the SERVER directory within the v5 directory (e.g., \IC\STRALTMA\SERVER)

- **PTSF v5 Server Directory:** K:\testing\pa\pa5\v5\IC\STRALTMA\SERVER
- **PTSF v5 Facility Id:** 220
- **Central Site URL:** https://ptsf.centralsiteportal.com
- **PTSF v5 Submitting Facility Id:** 220
- **User Id:** JUDIES
- **Password:** ********

Save  Save and Exit  Test Connection  Close
Submitting Cases to PTSF PA V5 Central Site

PA V5 Initial Setup

If successful, the following window will appear to indicate that the setup and connection is valid.
Submitting Cases to PTSF PA V5 Central Site

PA V5 Initial Setup

If an error message is displayed, click OK and then re-enter the information related to the error message. Examples include:

- **Problem:** User ID, Facility, or Password Provided is not valid. **Fix:** Verify web portal login credentials and re-enter User Id, Password, or PTSF v5 Submitting Facility Id.

- **Problem:** Invalid Central Site URL. **Fix:** Correct the Central Site URL Entry.

**NOTE:** Be sure to retest the connection by clicking Test Connection until you get the valid URL and credentials window.
Submitting Cases to PTSF PA V5 Central Site

Submission Process

◦ After you have completed the one-time configuration steps listed in the PA v5 Outcomes Transfer Setup section, you can submit records from the PA v5 Outcomes Registry to the PTSF Central Site Web Portal.

◦ Only qualifying death cases are submitted to the PTSF Central Site Web Portal. To be submitted, a record must meet the following criteria:
  ◦ Have a Closed status in the PTOS Cv4 Trauma Registry
  ◦ Have a Closed status in the PA v5 Outcomes Registry
  ◦ Include a DEATH Issue
  ◦ Have a Patient Arrival Date of January 1, 2018 or later

◦ Note that the cases submitted do NOT include any user entered notes, discussions, comments or other memos.
Submitting Cases to PTSF PA V5 Central Site

Submission Process – Steps:

1. Open the **PA v5 Registry Module**. From the **File** menu, select the **Transfer Data** menu option. Next select the **PA v5 Outcomes Submission** menu option.

2. The **SDL Run** screen will appear.

3. Select the **[Run]** button. Once completed, the following message will be displayed indicating a successful submission to the **PTSF Central Site Portal**.

4. Select the **[OK]** button. A final status window indicating the total number of cases processed (reviewed) for submission is provided with the following information:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Records</td>
<td>Based on the date range entered, the total number of records processed for inclusion in the submission file.</td>
</tr>
<tr>
<td>Number of records processed successfully</td>
<td>The number of records processed successfully for inclusion in the State Download Module. This is NOT the number of records in the actual submission file.</td>
</tr>
<tr>
<td>Number of records failed to process</td>
<td>The number of records that failed processing for inclusion in the State Download Module.</td>
</tr>
</tbody>
</table>
Submitting Cases to PTSF PA V5 Central Site

Log Files:

Two log files are generated for each submission. The log files can be found in the PA V5 Software folder. From this folder, go to the SDL\SERVER\OUTPUT\LOGS folder.
Submitting Cases to PTSF PA V5 Central Site

Log Files:

PAv5_Outcomes_####_YYYYMMDDHHMM(SDLDetailReport).CSV – Contains the list of cases examined and sent.

Use the Included column to determine the cases sent (Included = Yes)
Submitting Cases to PTSF PA V5 Central Site

PAv5_Outcomes_#####_YYYYMMDDHHMM_SDLSummaryReport.CSV – Contains a summary of the file submission.
Checking Submissions

Site URL: https://ptsf.centralsiteportal.com

Credentials obtained from PTSF.

WARNING: APPLICATION/SYSTEM ADMINISTRATION AND SECURITY MONITORING

The use of this application/system is restricted to authorized users only. This application/system and equipment are subject to monitoring to ensure proper performance of applicable security features or procedures. Such monitoring may result in the acquisition, recording, and analysis of all data being communicated, transmitted, processed or stored in the application/system including but not limited to information stored locally on the hard drive, by a user. There is no right of privacy in this application/system. If monitoring reveals possible evidence of criminal activity, such evidence may be provided to law enforcement personnel and other personnel in conjunction with a report of improper or unauthorized use.

(Disclaimer - Any user who extracts information from the application/system unto media such as, but not limited to, a Floppy disk, CD, DVD, Flash Drive, becomes solely responsible for the safekeeping of that information).
Checking Submissions

From the Welcome page, select **Submission Review**
Checking Submissions

Set the range to check and click **Search**. A list of submissions that have been sent to PTSF will be listed.
REPORTING
Reporting – Standard Reports

The DI Report Writer contains Outcomes specific standard reports designed for immediate application to the peer review/QA process in your trauma program.

**Daily Reports** – Reports that are used during the review of an individual case in the PIPS process of a trauma program. These reports focus on a single patient record and are designed to be executed from within a patient record.

**Management Reports** – Reports that are designed to work in the management of cases in the PIPS process. These reports focus on a group of records and provide tables or listings that focus on specific groups of cases.

**Research and Benchmarking Reports** – Reports that are designed to provide statistics for the PIPS process in a trauma program. These reports also focus on specific groups but generate descriptive statistics (counts, averages, percentages) for those groups. Strategic report outputs can then be analyzed and used in decision-making processes that can affect the outcomes in a trauma program.
Reporting – RDE Package

Introduction to the PA V5 Enhanced RDE Package
  o Queries
    o V5 Standard Query Vocabulary
    o PIPS – PA V5 Query Vocabulary
  o Reports
    o Data Tables
    o Statistical Reports
  o Gather
    o V5 Standard Gather Definitions
    o PIPS – PA V5 Gather Definitions

Using RDE Package Reporting Tools
  o Examples
Reporting – RDE Package

Queries

V5 Standard Query Vocabulary

• Age Queries
• Arrival/ED Discharge Date Queries
• Diagnosis Queries
• Injury Severity Score Queries
• Other Queries

PIPS – PA V5 Query Vocabulary

• Filter Queries – DI_FLT
• Occurrence Queries - OCC
• Opportunity for Improvement Queries - OFI
• Tracked Issue Queries – TRK
• Other PA V5 Queries
Age Queries

- Begin with AGE
- Include Category Queries for Adults/Geriatric/Peds
- Age GEQ Queries
- Age LT Queries
- AGE_NV – Age Not Valued

NOTE: To adjust cutoffs for Geriatric vs. Adult and Adult vs. Pediatric, modify the values in the related CUTOFF queries.
Arrival Queries
- Begin with ARR
- Includes DOW, Month, and Quarter queries

ED Discharge Queries
- Begin with EDD
- Includes DOW, Month, and Quarter queries

NOTE: Other related date queries with similar patterns also defined
- INJ – Injury Date
- DIS – Hospital Discharge Date
Diagnosis Queries

- Begin with DX
  - DX_AIS – Based on PREDOT code of the Abbreviated Injury Scale
  - DX_ICD10 – Based on the ICD10 code
- Can be used with gather or reports
- Example: Number of procedures for liver injury patients
Injury Severity Score Queries

- Begin with ISS
- Ranges based on ACS definitions:
  - Minor injuries: ISS <= 8
  - Moderate injuries: ISS greater than 8 but less than 16
  - Major injuries: ISS >= 16
  - Severe injuries: ISS >= 25
- Example: List of cases with severe injuries by attending trauma surgeon (using Gather).
Injury Severity Score Queries

- **Result**

<table>
<thead>
<tr>
<th>Facility ID</th>
<th>Trauma #</th>
<th>MR #</th>
<th>Age</th>
<th>Arrival Date</th>
<th>ICU Days</th>
<th>Discharge Date</th>
<th>LOS</th>
<th>RTS</th>
<th>ISS</th>
<th>P(s)</th>
<th>Outcome Destination</th>
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<td>JONES</td>
</tr>
</tbody>
</table>
V5 Standard Vocabulary

Other Queries

Other Queries Groups
- ED_DISP queries – Selects patients with specific ED dispositions
- HOSP_DISP queries – Selects patients with specific final dispositions
- TRAUMA_ALERT/CONSULT queries – Selects patients with specific alerts and consults
- RACE queries – Selects patients by specific race classification

Other Specific Queries
- ALIVE/DEAD – Selects patients who survived/expired
- DIRECT_ADMITS – Selects patients directly admitted (bypass ED)
- MALE/FEMALE – Selects patients that are male/female
- PT_TRANSFER_IN/PT_NOT_TRANSFER_IN – Selects patients that were transferred/not transferred to your facility
Filter Queries – *DIFLT*

- _NOT_TRK - Not Tracked Queries
- _STATUS - Status Queries
- DIFLT_NT – Any Filter Not Tracked
- All PTSF Audit Filters have a not tracked query and status query
Filter Not Tracked Queries

- End in _NT
- Query evaluates TRUE if the filter is identified but not tracked.
- Can be used to find cases with a specific PTSF audit filter that has been identified but not tracked.
Filter Status Queries

- **End in _STATUS**
- Returns two display values:
  - **ID BUT NOT TRACKED** – Indicates the filter is being identified but not being tracked in the tracked events section (i.e. not triggered).
  - **TRACKED** – Indicates that the filter has been identified and is listed in the tracked events section (i.e. triggered).
- Query evaluates FALSE if the audit filter is not being triggered.
- Filter status queries can be used for both display in data tables and in selecting records (as a query).
### Any Filter Not Tracked

- **DIFLTNT** – Any PTSF Audit Filter identified but not tracked.
  - Can be used to find cases with at least one PTSF audit filter that has been identified but not tracked.
### Occurrence Queries – OCC

- Identified Queries
- Not Tracked Queries (_NT)
- Identified within a certain time period
- OCC_NOT_TRACKED – Any Occurrence Not Tracked
- All PTSF Occurrences have identified and not tracked queries.

**Table: Query Manager**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
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<tbody>
<tr>
<td>OCC_1010_GRAFTLOSS</td>
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<td>Occurrence 1010 - Not Track</td>
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</tr>
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<td>Occurrence 1011 - Not Track</td>
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<tr>
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<td>Burn Delay in Donor Site</td>
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<td>OCC_1014_NG</td>
<td>Occurrence 1014 - Not Track</td>
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<tr>
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<td>Occurrence 1015 - Not Track</td>
</tr>
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<td>Pulmonary ARDS</td>
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<td>OCC_1022_NT</td>
<td>Occurrence 1022 - Not Track</td>
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<tr>
<td>OCC_1022_P_ASPNEUMO</td>
<td>Pulmonary Aspiration Pneum</td>
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<tr>
<td>OCC_1024_NT</td>
<td>Occurrence 1024 - Not Track</td>
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<tr>
<td>OCC_1024_P_FATEMBOL</td>
<td>Pulmonary Fat Embolus</td>
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</table>
Occurrence Identified Queries

- Query evaluates TRUE if a specific occurrence is identified in the record.
- Name includes OCC_#### (where #### is the ID number of the occurrence, e.g. 1207 for NTDS Occurrence VAP) and an abbreviated occurrence description.
- Every occurrence has a specific OCC query defined.
- Can be used to find cases with a specific occurrence.
Occurrence Not Tracked Queries

- End in _NT
- Query evaluates TRUE if the occurrence is identified but not tracked.
- Can be used to find cases with a specific occurrence that has been identified but not tracked.
Occurrence Not Tracked Queries

- Can also be used to generate a list of cases with a specific occurrence not tracked.

- Example: List of cases with VAP identified but not tracked
Occurrence within a Certain Time Period

- All names begin with OCC_WITHIN.
- Works with today’s date to find records with an occurrence within a certain time period.
- Time periods:
  - OCC_WITHIN_LAST_WEEK – within the last 7 days (week).
  - OCC_WITHIN_LAST_30D – within the last 30 days
  - OCC_WITHIN_LAST_60D – within the last 60 days
- Can be used to find recently identified cases for tracking and review.
Any Occurrence Not Tracked
- OCC_NOT_TRACKED – Any occurrence identified but not tracked.
- Can be used to find cases with at least one occurrence that has been identified but not tracked.
Opportunity for Improvement Queries - OFI

- Begin with OFI
- Name includes OFI_#### (where #### is the ID number of the specific opportunity for improvement, e.g. 9008, Burn Care Issue) and an abbreviated OFI description.
- Every opportunity has a specific OFI query defined.
- Can be used to report on specific OFI issue by attending trauma surgeon.
Tracked Event Queries - TRK

- Begin with TRK
- Name includes TRK_#### (where #### is the ID number of the specific occurrence for improvement, e.g. 1033, DVT) and an abbreviated occurrence description.
- Every occurrence has a specific TRK query defined.
- Additional related queries include:
  - Tracked queries within a certain time period. Example: TRK_WITHIN_LAST_WEEK – Identified any related tracked event within the last week.
  - TRK Category Queries (e.g. TRK_BURN – Selects any burn related tracked event)
PIPS – PA V5 Query Vocabulary

Other Queries

Other Queries Groups

• PTOS_REC_STAT queries – Selects patients that are active or closed in the trauma registry
• DTH_WITHIN queries – Selects patients that died within a certain time period. (E.g. DTH_WITHIN_30D – Deaths within the last 30 days)

Other Specific Queries

• PTOS_PT – Selects patients with PTOS PT inclusion set to Yes
• IN_HOUSE_PT – Selects patients that do not have a discharge date/time (considered in-house).
• NON_PTOS_PT – Selects patients with PTOS PT inclusion criteria not set to Yes
• TRANSFERS_OUT – Select patients that have a discharge disposition indicating a transfer to another acute care center.
User Reports

User Data Tables

- DI_FLT_LIST – Filter List – Lists patients with status indicator columns for each PTSF audit filter.
- DI_FLT_NT_LIST – Filter Not Tracked – Lists patients with at least one PTSF audit filter not tracked and the status of each PTSF audit filter.
- DI_OCC_LIST – Occurrences List – Lists patients with at least one occurrence identified. Each row represents an identified occurrence. Patient entries will repeat for multiple occurrences identified.
- DI_OCC_NT_LIST – Occurrences Not Tracked List – Lists patients by occurrences that have been identified but not tracked. Patient entries will repeat for multiple occurrences identified but not tracked.
- DI_PT_LIST – Patient List – Simple patient listing template.
- DI_PT_LIST_EXTENDED – Extended Patient List – Expanded patient listing template. Includes over 50 columns.
- DI_TRACKED_EVENT_LIST – Tracked Event List - Similar to the tracked event report but can be adjusted by the user.

Statistical User Reports

- CNTS_ISSUE_DMTH – Number of Issues by Discharge Month – Tabulates the number of tracked issues by discharge month.
- CNTS_OCCID_DMTH – Number of Identified Occurrences by Discharge Month – Tabulates the number of identified occurrences by discharge month.
- CNTS_DIFLT_DMTH – Number of Identified PTSF Audit Filters by Discharge Month – Tabulates the number of identified PTSF audit filters by discharge month.
The TRACKED status indicates that the audit filter has been triggered for review. The ID BUT NOT TRACKED status indicates that the audit filter is being identified but not triggered for review.

- **DI_FLT_LIST** – Filter List – Lists patients with status indicator columns for each PTSF audit filter.
- **Application**: Determine review status for each PTSF Audit filter in one report.
### User Reports

- **DI_FLT_NT_LIST** – Filter Not Tracked – Lists patients with at least one PTSF audit filter not tracked and the status of each PTSF audit filter.

- **Application**: Determine the list of cases that may require review for a specific audit filter.

---

**Used Hide Columns and Filter features of Excel to target the four cases to examine that have GCS \( \leq 9 \) and left ED without Definitive Airway.**

---

<table>
<thead>
<tr>
<th>Date</th>
<th>Age</th>
<th>Gender</th>
<th>RTS</th>
<th>ISS</th>
<th>P(s)</th>
<th>Outcome Destination</th>
<th>Ambulance Scene Time &gt; 20 minutes</th>
<th>Missing PCR Reqs</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2018</td>
<td>1</td>
<td>Female</td>
<td>7.841</td>
<td>5</td>
<td>0.996</td>
<td>PA Trauma Center</td>
<td>ID BUT NOT TRACED</td>
<td></td>
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<tr>
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<tr>
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<td>9</td>
<td>0.968</td>
<td>Transitional Care Unit</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DI_OCC_LIST – Occurrences List – Lists patients with at least one occurrence identified. Each row represents an identified occurrence. Patient entries will repeat for multiple occurrences identified.

Application: List of cases with at least one occurrence identified

The **Auto Trigger** column indicates whether the occurrence has been triggered in the tracked events (True) or not (False).
**User Reports**

- **DI_OCC_NT_LIST** – Occurrences Not Tracked List – Lists patients by occurrences that have been identified but not tracked. Patient entries will repeat for multiple occurrences identified but not tracked.

- **Application**: Target DVT cases that have been identified but not tracked.

Used Filter features of Excel to target the cases with *DVT* that are not being tracked.
**User Reports**

- **DI_PT_LIST** – Patient List – Simple patient listing template
- **Application:** List of cases in the PA V5 Registry for January 2018

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<th>ICU Days</th>
<th>Discharge Date</th>
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<th>RTS</th>
<th>ISS</th>
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<td>7.841</td>
<td>17</td>
<td>0.939</td>
<td>Skilled Nursing Faci</td>
</tr>
</tbody>
</table>
- DI_PT_LIST_EXTENDED – Extended Patient List – Expanded patient listing template. Includes over 50 columns.
- Application: Detailed information on deaths within the last 90 days (using the DTH_WITHIN_90D query) for review.
DI_TRACKED_EVENT_LIST – Tracked Event List - Similar to the tracked event report but can be adjusted by the user.

Application: Review tracked events for upcoming meeting and any actions already identified.

Used **Word Wrap** features of Excel to format Detailed Actions Taken column.
- **CNTS_ISSUE_DMTH** – Number of Issues by Discharge Month – Tabulates the number of tracked issues by discharge month
- Application: Using gather BY_TRACKED_EVENT generated individual counts on each tracked issue stratified by month.
CNTS_OCCID_DMTH – Number of Identified Occurrences by Discharge Month – Tabulates the number of identified occurrences by discharge month.

Application: Using gather BY_OCC_EVENT generated individual counts on each identified occurrences stratified by month.
CNTS_DIFLT_DMTH – Number of Identified PTSF Audit Filters by Discharge Month – Tabulates the number of identified PTSF audit filters by discharge month

Application: Determine the individual counts on each identified audit filter stratified by month
# Reporting – RDE Package

## Gather Definitions Included (Partial List)

### V5 Standard Gather Vocabulary

- BY_ADM_SVC – By Admitting Service
- BY_AGE_CAT – By Age Category
- BY_ARR_MO – By Arrival Month
- BY_EDD_MO – By ED Discharge Month
- BY_DIS_MO – By Discharge Month
- BY_PROCEDURE – By Procedure
- BY_DIAG_PREDOT – By AAAM Predot Injury Diagnosis

### PA V5 Gather Vocabulary

- BY_ADMP_MD – By Admitting Physician
- BY_ATT_TRMD – By Attending Trauma Physician
- BY_OCC_EVENT – By Identified Occurrence
- BY_TRACKED_EVENT/BY_TRK_EVENT – Gather by Tracked Event (with and without codes).
- BY_TRK_REL_PROVI – Gather by First Related Provider Identified in Tracked Event
Example: Frequency Distribution by AAAM Predot Injury Diagnosis (using CNT_GTH_RPT report)

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<th>Description</th>
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</tr>
</thead>
<tbody>
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</tr>
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<td>LE skin/subcutaneous/muscle abrasion</td>
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<td>110402</td>
<td>scalp contusion; subgaleal hematomah if GT 6 months old</td>
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<td>fx GEO.3 ribs w/o flail NFS</td>
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<td>971002</td>
<td>UE skin/subcutaneous/muscle contusion; hematomah</td>
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<td>face skin/subcutaneous/muscle lac - minor; superficial</td>
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<td>cerebrum subarachnoid hemorrhage NFS</td>
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<td>pelvic ring fx - posterior arch intact; isolated fx</td>
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<td>cerebrum hematomah - subdural NFS</td>
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<td>pneumothorax NFS</td>
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Used **Sort** features of Excel to sort by most frequent to least frequent.