Public Health
HEALTH AND HUMAN SERVICES

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Secretary

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MEMORANDUM

TO: Local Health Directors, Directors of Nursing and Nursing Supervisors

FROM: Phyllis M. Rocco, RN, BSN, MPH
Head, Local Technical Assistance and Training Branch

DATE: June 17, 2016

SUBJECT: Additions to the Practice Management Section on the Division for Public Health Webpage

NEW PRACTICE MANAGEMENT DATA DASHBOARD - IMMUNIZATIONS

We have enhanced the Practice Management dashboards to now include a separate dashboard for agencies to track the number of immunization only services under the Immunization Program type. The title of the new dashboard is: ***Practice Management Data Dashboard – Immunizations***. By having this data teased out of the larger service counts, counties can better determine staffing needs when providing immunization services. This dashboard is also needed in order to complete the new ***Practice Management Clinical Workbook*** – see below.

NEW PRACTICE MANAGEMENT CLINICAL AND FISCAL WORKBOOKS

Practice Management Clinical Workbook

DPH has added a ***Practice Management Clinical Workbook*** which features many charts and graphs that can be used to measure and communicate clinical outcomes. This workbook is created from data obtained from the ***Practice Management Data Dashboard*** and the ***Practice Management Data Dashboard – Immunizations.***

Practice Management Financial Workbook

DPH has also added a ***Practice Management Financial Workbook*** which features many charts and graphs that can be used to measure and communicate financial outcomes. This workbook replaces the ***Financial Data Dashboard*** and is created from data obtained from the following:

- Agency current approved fiscal year budget;
- Agency current year to date general ledger;

- BL 094 Report in CSDW or from the agency's vendor system.

These workbooks will need to be completed and submitted to the Division of Public Health when requesting technical assistance and consultation with implementing a Practice Management program.

ACCESS TO THE PRACTICE MANAGEMENT DATA DASHBOARDS THROUGH CLIENT SERVICES DATA WAREHOUSE (CSDW)

You can access the new ***Practice Management Data Dashboard - Immunizations*** report in CSDW per instructions outlined below. If you do not have access to CSDW, please contact John Bryant at: john.bryant@dhhs.nc.gov and request a login and password.

Pathway to the report:

1. Log into: https://csdwportal.dhhs.state.nc.us/csdwlogin/
2. Click: Documents
3. Click: Folders (Bottom Left hand corner of screen)
4. Click: Public Folders
5. Click: DHHS Main Document
6. Click: DPH
7. Click: HIS
8. Click: State Sanctioned
9. Click: Count Services
10. Click: ***Practice Management Data Dashboard - Immunizations*** if you only need the number of immunization only visits. If you need the total visits, then click: ***Practice Management Data Dashboard.***
11. Then key the time frame and your county code.

As a reminder, the ***Practice Management Data Dashboard*** is similar to the original CSDW report, GC 010 F-T Service Count by Practitioner but the Patient Detail tab has been removed to make the report easier to use without having to encrypt the report as you share the data with other staff. If you want to view patient level data, you can use report GC 010 F-T (located on the same report screen as the ***Practice Management Data Dashboard***).

As you analyze these reports, refer to the following definitions:

Total Units = is the total of units of service provided. Most services are one unit to one service (like office visits), but some services are measured in units of time (T1017, T1002, T1016, etc.) For example, a T1016 X 30 minutes = 2 units because the code is billed/reported in 15 minute increments. Some injections are measured in units also.

Total Services = If a client has two of the same office visit codes in the time period of the report, but on different dates, the total services is two. So this is the total of all the service codes reported/billed. If any time/unit based codes are reported in the same time period, the total units would be a greater number than the total services.

We have included all the CPT code definitions used to generate the report, AND instructions on how to export the report to Excel and Word. For non-HIS (Batch) counties, we would

suggest you print the equivalent report from your vendor and compare to the data in the CSDW ***Practice Management Data Dashboard.***

If you have questions, please feel free to call your Public Health Nursing and Professional Development Nursing Consultant.

cc:
DPH Consultants
DPH Program Managers