

8.2.3 Period End Procedure – CIHI Transfer & Data Quality

The Period Submission process begins once data entry into the BC Perinatal Data Registry (BCPDR) for your period (s) or quarter or fiscal year is complete and data errors from your DAD Submission Detailed Error and Outstanding Hard Error by Institution reports have also been corrected in your hospital's Health Records Abstracting system (e.g. WinRecs or 3M). The following sections outline the step by step process for preparing the batch data file and period end summary report.

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8.2.3.1 Period End Checklist

- Step 1: Correct all errors from your DAD Submission Detailed Error and Outstanding Hard Error by Institution Reports in your hospital's Health Record Abstracting system (e.g. WinRecs or 3M).
- Step 2: Review and correct mother and baby records that contain linkage or validation errors. Refer to Section 8.2.3.2, Performing Linkage and Validation Checks.
- Step 3: Create a CIHI text file from your Hospital's Health Record Abstracting System (e.g. WinRecs or 3M). Refer to Section 8.2.3.3, Creating a CIHI Text File.
- Step 4: Import the CIHI Data from your CIHI text file into the CIHI Screen of the BCPDR's Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum Suites. Refer to Section 8.2.3.4, Performing a CIHI Import.
- Step 5: Review and correct rejected records from the CIHI Import Rejections Table and/or the BCPDR's Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum Suites. Refer to Section 8.2.3.5, Reviewing and Correcting CIHI Import Rejections.
- Step 6: Export the corrected records from the CIHI Import Rejections Table to Create a REJECTS.CHI File. Refer to Section 8.2.3.6, Exporting Rejections to Create a REJECTS.CHI File.
- Step 7: Import the corrected CIHI data from your REJECTS.CHI File into the CIHI Screen of the BCPDR's Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum Suites. Refer to Section 8.2.3.7, Importing the REJECTS.CHI File.
- Step 8: Review and correct all rejected records from the CIHI Import Rejections Table and/or the BCPDR's Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum Suites. Refer to Section 8.2.3.5, Reviewing and Correcting CIHI Import Rejections.
- Step 9: Export the next cycle of corrected records from the CIHI Import Rejections Table to create another REJECTS.CHI File. Refer to Section 8.2.3.6, Exporting Rejections to Create a REJECTS.CHI File.
- Step 10: Import the next cycle of corrected CIHI date from your REJECTS.CHI File into the CIHI Screen of the BCPDR's Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum Suites. Refer to Section 8.2.3.7, Importing the REJECTS.CHI File.
- Step 11: Run, review, and correct all Data Quality Checks from the Data Quality Tool (if applicable to your facility). Refer to Section 8.2.3.8, Performing Data Quality Checks from the BCPDR Data Quality Tool.
- Step 12: Run the BCPDR Data Quality Checks from Period End Reports. Refer to Section 8.2.3.9, Performing BCPDR Data Quality Checks from Period End Reports.
- Step 13: Review and correct mother and baby records that contain linkage, validation errors or CIHI not Transferred errors.
- Step 14: Export completed and corrected mother and baby records into a batch (data) file. Refer to Section 8.2.3.10, Exporting Completed and Corrected Records into a Batch (Data) File.

- Step 15: Retrieve your Period End Summary (Request for Payment) report. Refer to Section 8.2.3.11, Retrieving the Period End Summary (Request for Payment) Report.
- Step 16: Electronically submit your batch (data) file and Period End Summary (Request for Payment) report. Refer to Section 8.2.3.12, Electronic Data and Period End Summary (Request for Payment) Report Submission.

8.2.3.2 Performing Linkage and Validation Checks

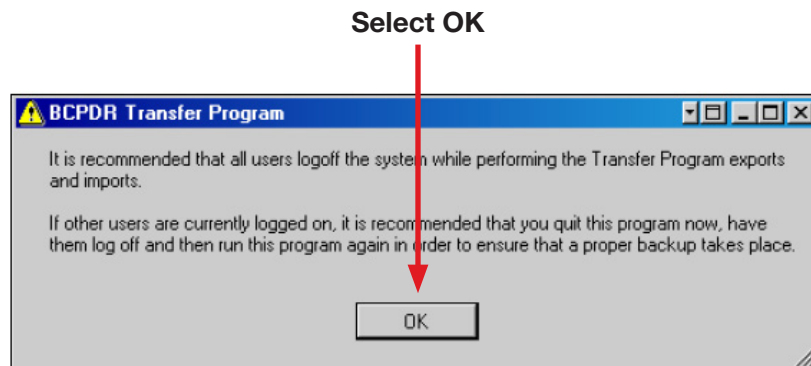
Before creating and importing a CIHI text file from your hospital's Health Record Abstracting system (e.g. WinRecs or 3M) into the BCPDR, all selected records (from your period (s) or quarter or fiscal year) ready for Period Submission **MUST** be **Saved and Validated** after data entry is completed.

- a) Select **Transfer Programs** from the Perinatal Database Registry application menu:

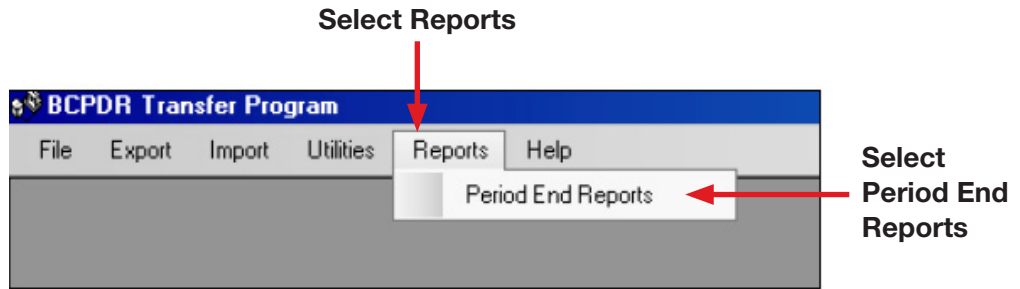


- b) The **BCPDR Transfer Program** screen will appear to prompt all users to log off the system before exporting and importing.

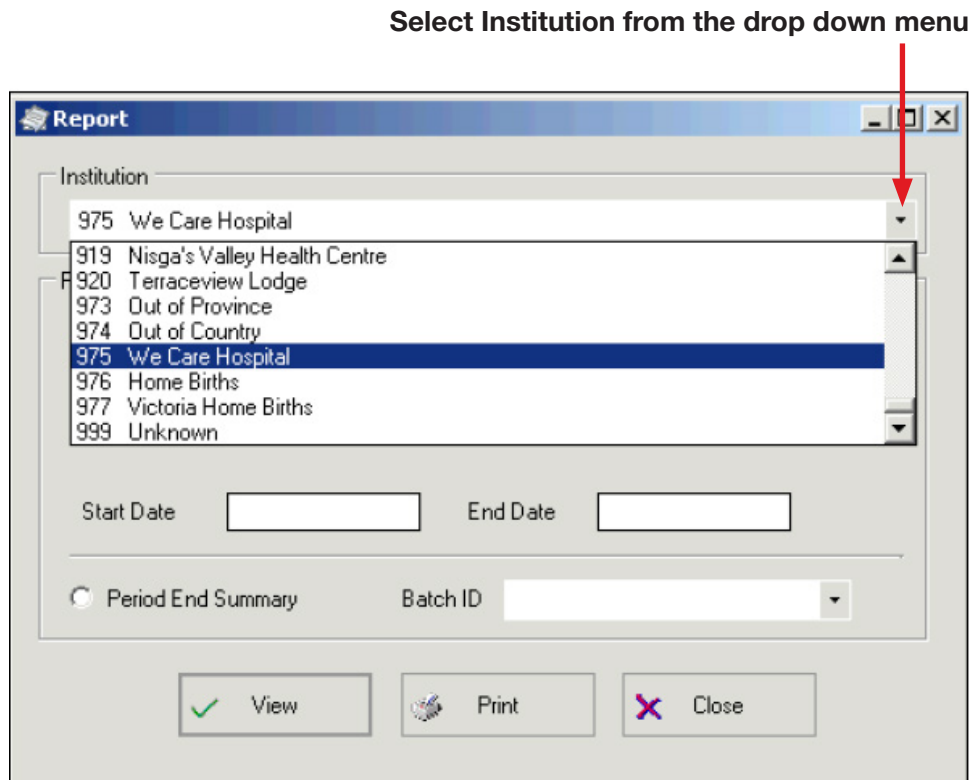
NB: If your facility is part of a merged database system in your Health Authority, all users are not required to log off the system while performing the Period Submission process.



- c) From the **BCPDR Transfer Program** screen, select **Reports** from the menu bar. Then select **Period End Reports**.



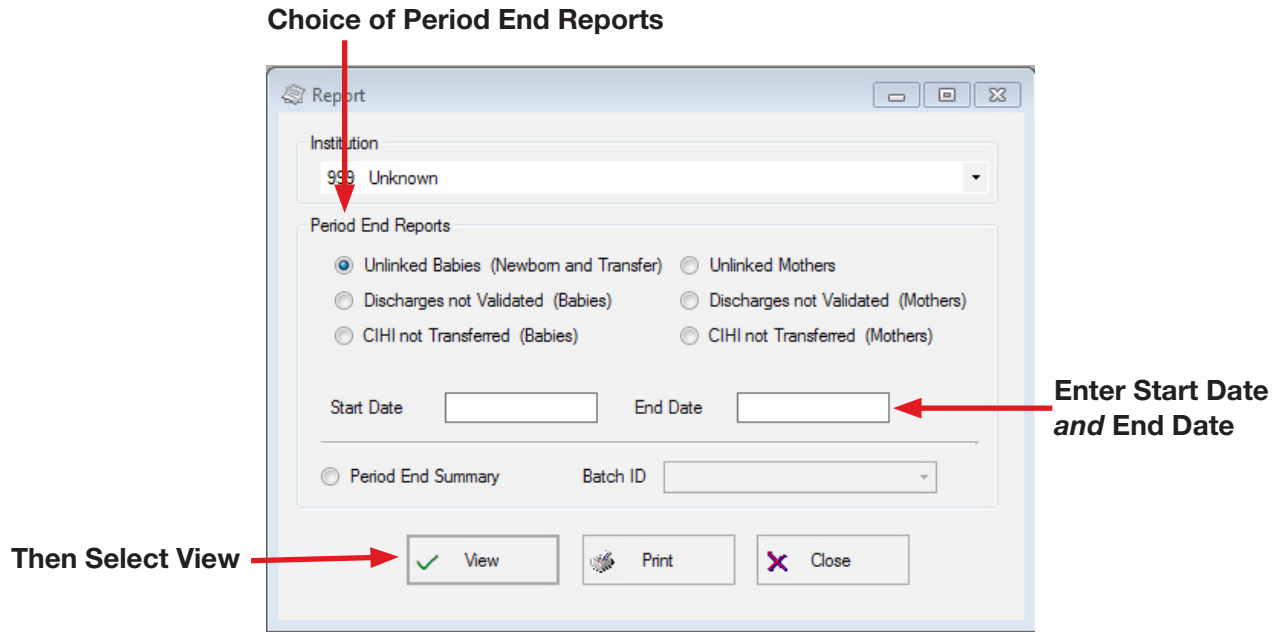
- d) The **Report** screen will appear. Select the appropriate institution in the **Institution** field from the drop down menu located to the right side of the screen.



e) Select the **Period End Report** (one at a time), enter the **Start Date** and **End Date** (to identify the date range such as the Period, Quarter, or Fiscal Year) and then click on **View**.

NB: Select and View, one at a time, the following four Period End Reports:

- **Unlinked Babies (Newborn and Transfer)**
- **Unlinked Mothers**
- **Discharges not Validated (Babies)**
- **Discharges not Validated (Mothers)**



f) After selecting **View** for each Period End Report, a report will appear with a listing of records with errors for **Unlinked** and/or **Not Validated records**.

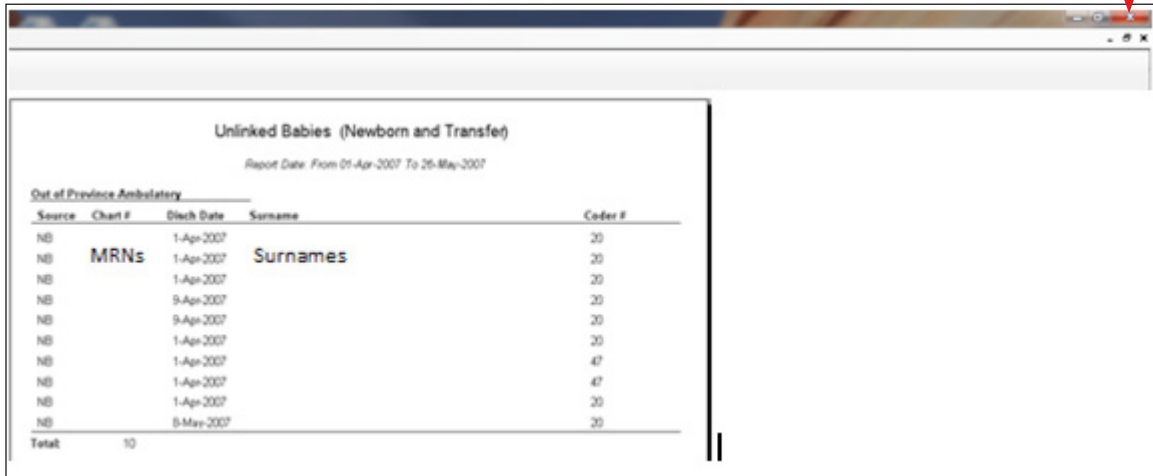
To print the report, select the **Print Icon** from the top left corner of the screen for a listing of Unlinked or Discharges not Validated records.

Example of a report with a listing of Unlinked Babies records in the BCPDR

Unlinked Babies (Newborn and Transfer)				
Report Date: From 01-Apr-2007 To 26-May-2007				
<u>Out of Province Ambulatory</u>				
Source	Chart #	Disch Date	Surname	Codes #
NB		1-Apr-2007		20
NB	MRNs	1-Apr-2007	Surnames	20
NB		1-Apr-2007		20
NB		9-Apr-2007		20
NB		9-Apr-2007		20
NB		1-Apr-2007		20
NB		1-Apr-2007		47
NB		1-Apr-2007		47
NB		1-Apr-2007		20
NB		8-May-2007		20
Total	10			

- g) Select the **Upper “X”** to exit the Report screen and the Transfer Programs application.

Select the Upper “X”



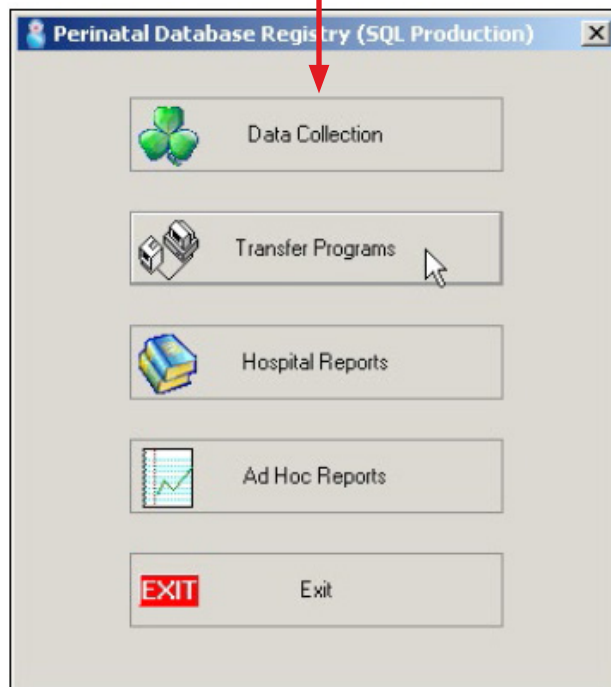
Unlinked Babies (Newborn and Transfer)
Report Date: From 01-Apr-2007 To 26-May-2007

Out of Province Ambulatory

Source	Chart #	Disch Date	Surname	Coder #
NB		1-Apr-2007		20
NB	MRNs	1-Apr-2007	Surnames	20
NB		1-Apr-2007		20
NB		9-Apr-2007		20
NB		9-Apr-2007		20
NB		1-Apr-2007		20
NB		1-Apr-2007		47
NB		1-Apr-2007		47
NB		1-Apr-2007		20
NB		8-May-2007		20
Total				10

- h) To correct Unlinked and/or Discharges not Validated records from the Period End Reports, select the **Data Collection** application.

Select Data Collection



i) The following statements are general guidelines for linkage and validation errors.

Unlinked Mother and Unlinked Baby Records:

- Always link records from the Baby Newborn suite.
- If the mother delivers twins, two Baby Newborn suite records should be linked to the Mother suite record.
- Always **Save** and **Validate** all completed records.

NB: Please note that some records may not be linked, particularly for cases where the mother had already been discharged and the baby has not yet been discharged. In these types of cases, it is acceptable for the mother record not to be linked to the baby record at the time of your period submission.

Discharges Not Validated for Mother and Baby Records:

- **Save** and **Validate** all completed records.
- Records that are **NOT Saved and Validated** will **NOT be EXPORTED** into your hospital's data file.

j) Exit from the Data Collection application after all the records are corrected, saved and validated.

k) Select **Transfer Programs, Reports, Period End Reports** to **re-run the four Period End Reports again** and determine if all the records are Saved and Validated and/or Linked.

Refer back to Part a) to Part k) in this section to re-run the Period End Reports.

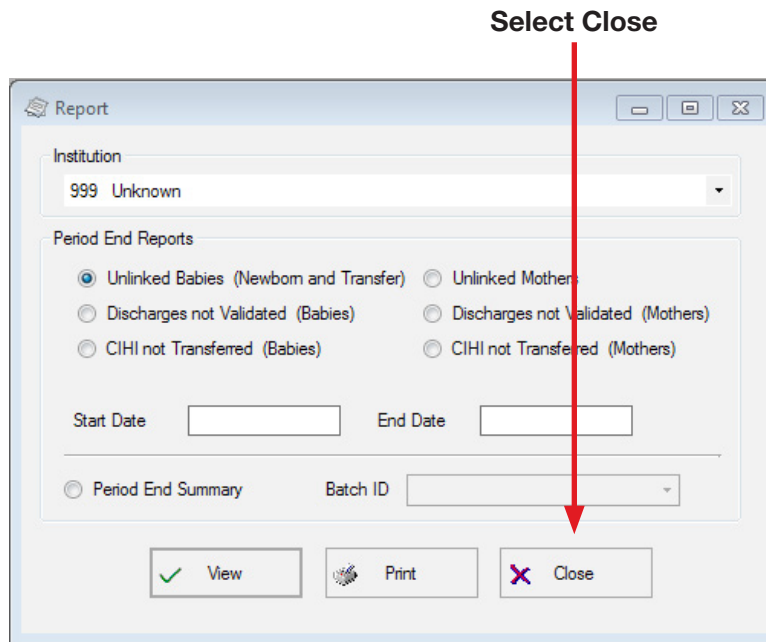
NB: Continue to re-run the reports and make corrections in the BCPDR as required until the four Period End Reports are clear of errors.

l) If the report contains no errors, a **Report** screen will appear to show that there are “No records found” (clear of errors).

Select **OK** to close the Report.



Select **Close** to exit the Report screen.



8.2.3.3 Creating a CIHI Text File

A CIHI text file needs to be created from your hospital's abstracting system **prior** to importing the CIHI data into the BCPDR. Please refer to your hospital's procedure, which was programmed by your hospital's CIHI abstracting vendor, for creating the CIHI text file from your hospital's Health Record Abstracting system (e.g. WinRecs or 3M).

- a) The CIHI text file's Start Date and End Date must be the same as the Start Date and End Date (e.g. Period, Quarter, or Fiscal Year) used to run the four Period End Reports from Section 8.2.3.2.

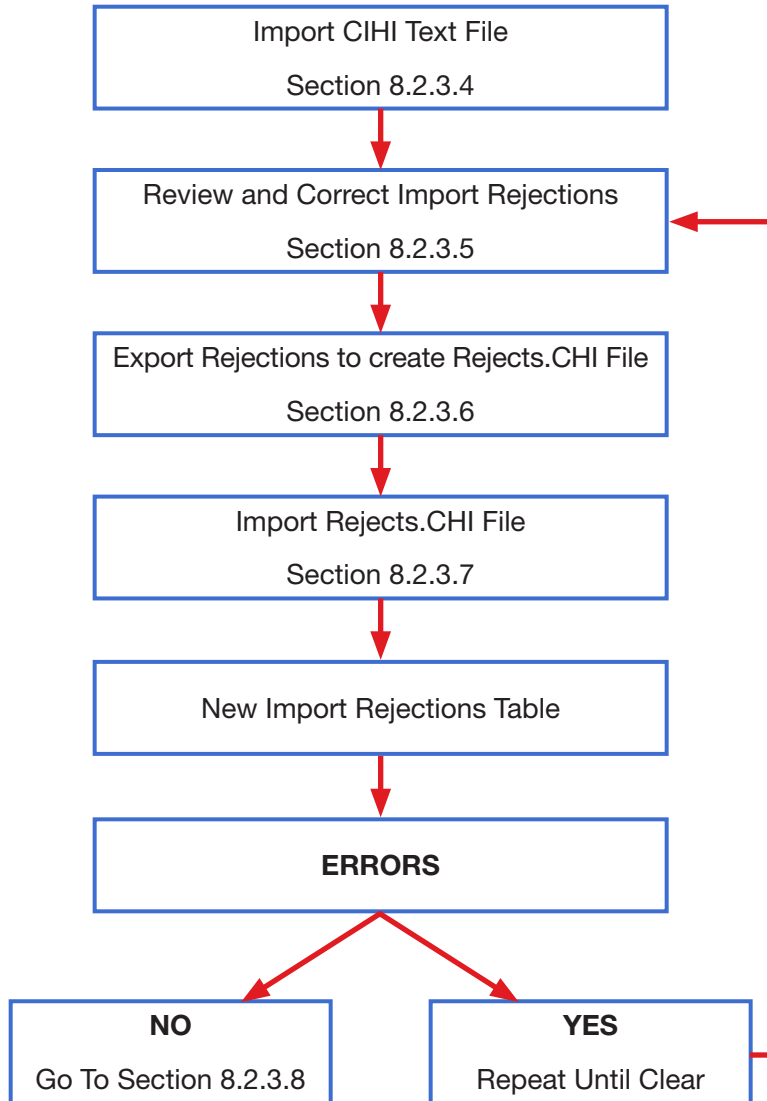
NB: Please make note of where your CIHI text file is saved. This CIHI text file will be used to import your hospital's CIHI data into the BCPDR's CIHI screen.

The following criteria are used to determine record selection, for the CIHI text file, from your hospital's Health Record Abstracting system (e.g. WinRecs or 3M):

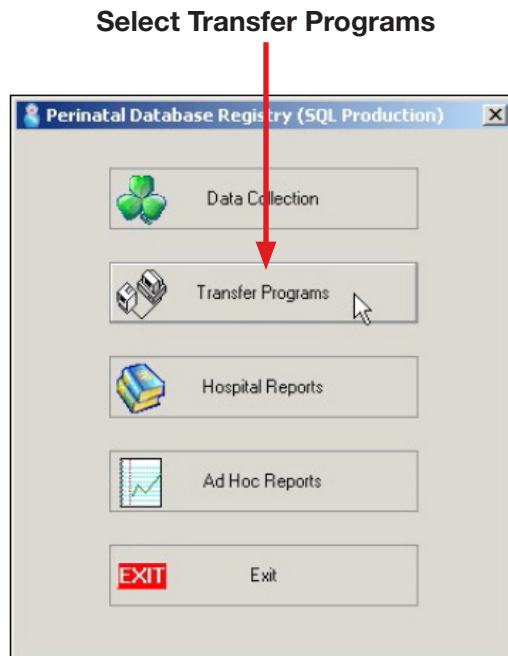
Records	Criteria
Mother	Patient Service 51 (Obstetrics Delivered)
	Patient Service 53 (Obstetrics Aborted) <i>NB: These records may include deliveries at ≤20 weeks gestation in which the pregnancy was terminated.</i>
	Patient Service 59 (Obstetrics Postpartum) <i>NB: Includes readmission to hospital within 24 hours or admission to surgical daycares >24 hours but ≤42 days post delivery.</i>
	Records with ICD 10 postpartum codes, regardless of patient service: Codes between O10 and O99 with a 6th digit of 4 <i>or</i> Codes F53.0, F53.1, F53.8, F53.9, Z39.0, Z39.1 or Z39.2.
Baby	Patient Service 54 (Newborn)
	Patient Service 89 (Stillbirth)
	Admission Category of NB or SB
	Admission to hospital >24 hours after birth and ≤28 days of age
	Transferred from another hospital and reached one year of age

8.2.3.4 Performing a CIHI Import

The CIHI text file created from your hospital's abstracting system will be used to import your CIHI data into the BCPDR's CIHI screen. The following flowchart outlines the steps in the import process and the Import Rejection cycle that is repeated until all errors are cleared.

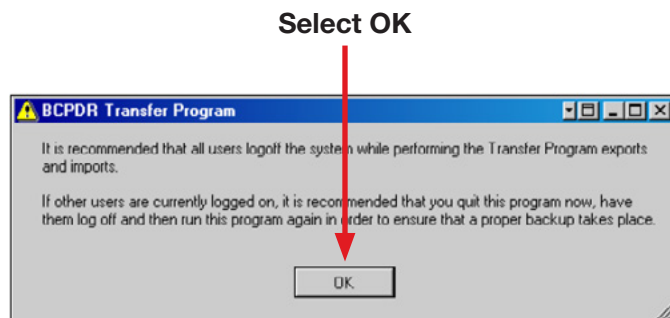


- a) Select **Transfer Programs** from the Perinatal Database Registry application menu:

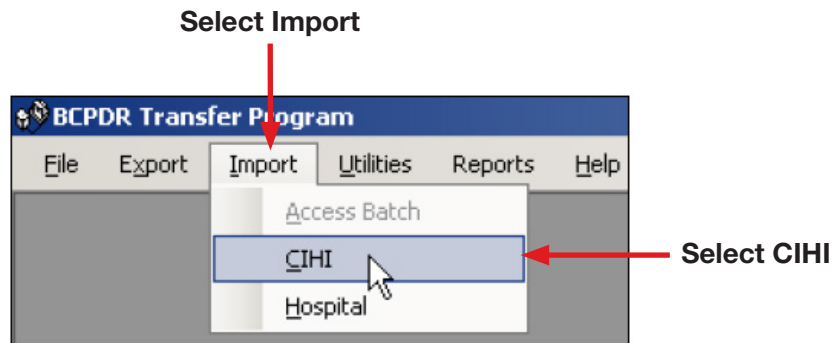


- b) The **BCPDR Transfer Program** screen will appear to prompt all users to log off the system before exporting and importing.

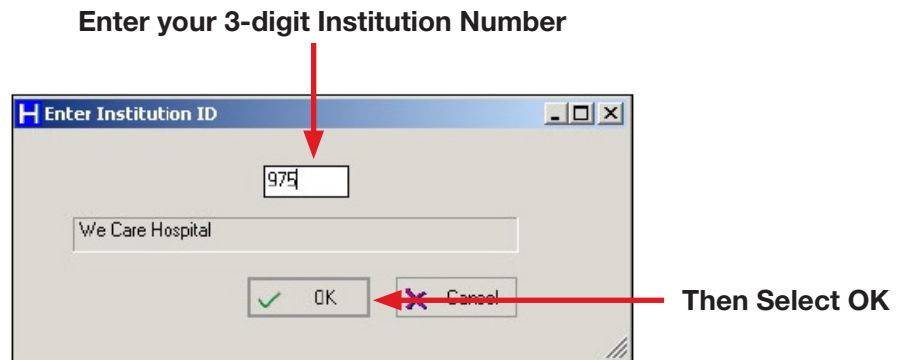
NB: If your facility is part of a merged database system in your Health Authority, all users are not required to log off the system while performing the Period Submission process.



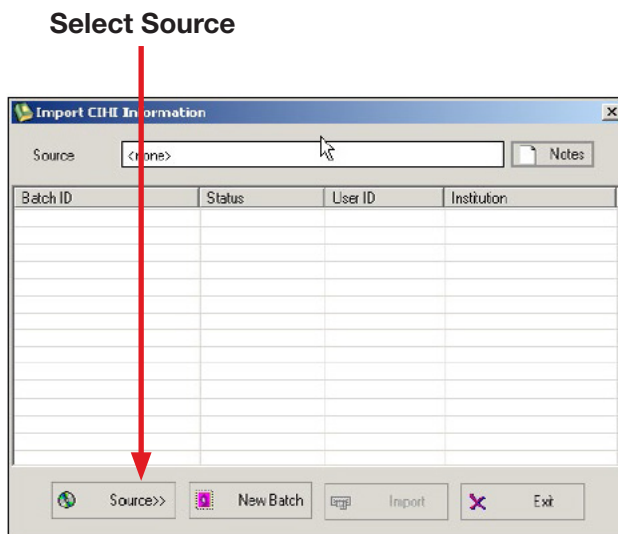
- c) From the **BCPDR Transfer Program** screen, select **Import** from the menu bar. Then select **CIHI**.



- d) The **Enter Institution ID** screen will appear. **Enter your 3-digit Institution Number**. The corresponding Institution Name will also display. Select **OK**.



- e) The **Import CIHI Information** screen will appear. Select **Source** to retrieve your CIHI text file from your hospital's drive and shared or default folder.

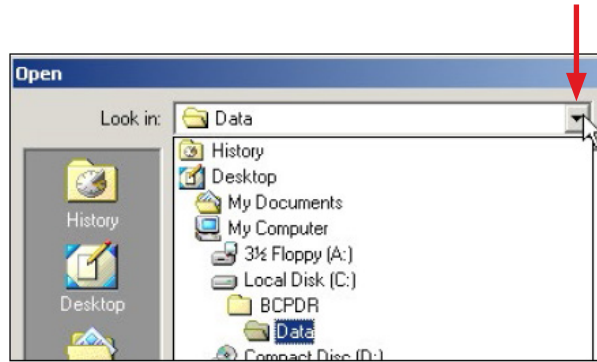


f) The **Open** screen will appear. Depending on your hospital's folders set up, your CIHI text file may be located in your hospital's drive shared folder or default folder.

If your CIHI text file is located in your **shared folder**:

- Select the down arrow from the **Look In** field, which is located at the top of the screen, to find the path of the file.

Select the Path and File Name



If your CIHI text file is located in your **default folder**:

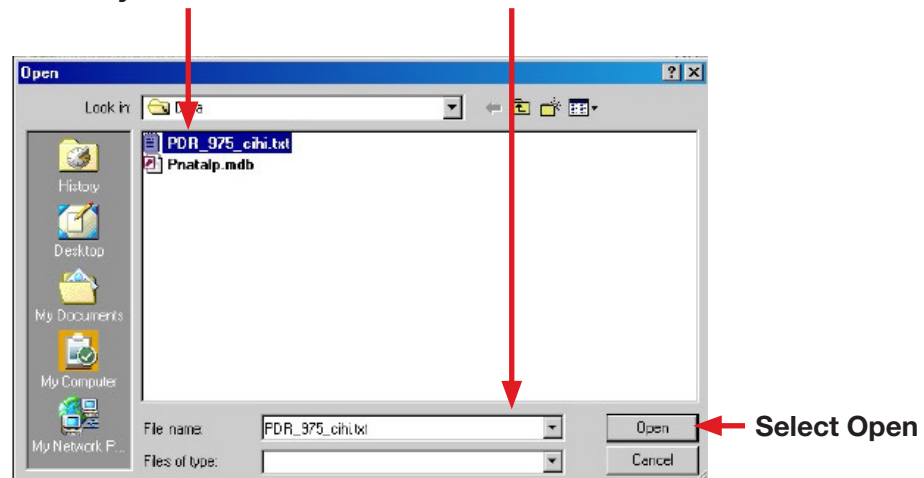
- The path of the file is already defaulted in the **Look In** field.

Once the path to your CIHI text file is located:

- **Click on the file name to select your CIHI text file.** Once selected, the file name will appear in the **File Name** field at the bottom of the screen (see screenshot below).
- Double check the file name to ensure that it is for the CIHI text file you want to import, then select **Open**.

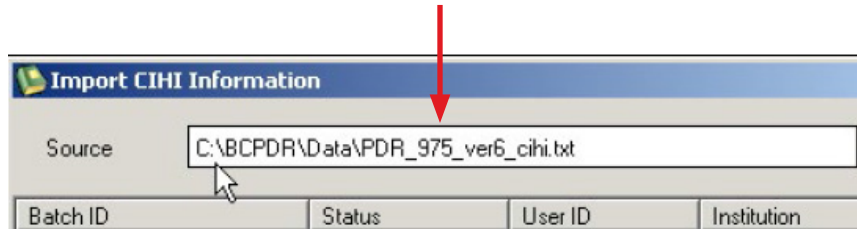
Select your CIHI text file

File name: field



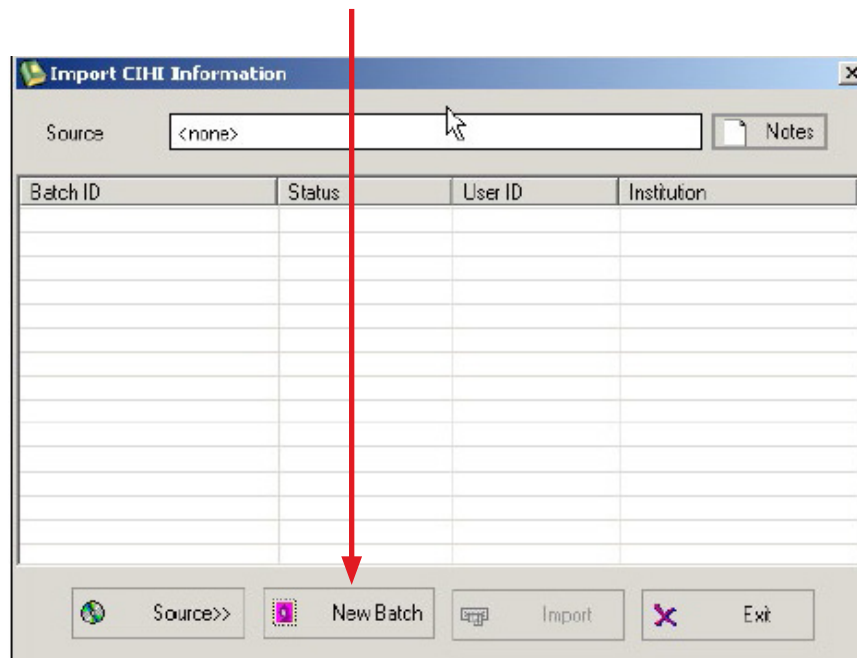
- g) The **Import CIHI Information** screen reappears. The selected path and file name is now displayed in the **Source** field.

Path and file name is now displayed in the Source field

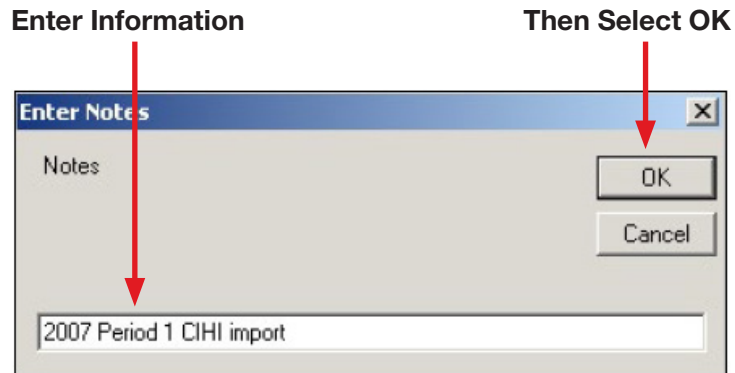


- h) Select **New Batch** from the **Import CIHI Information** screen.

Select New Batch



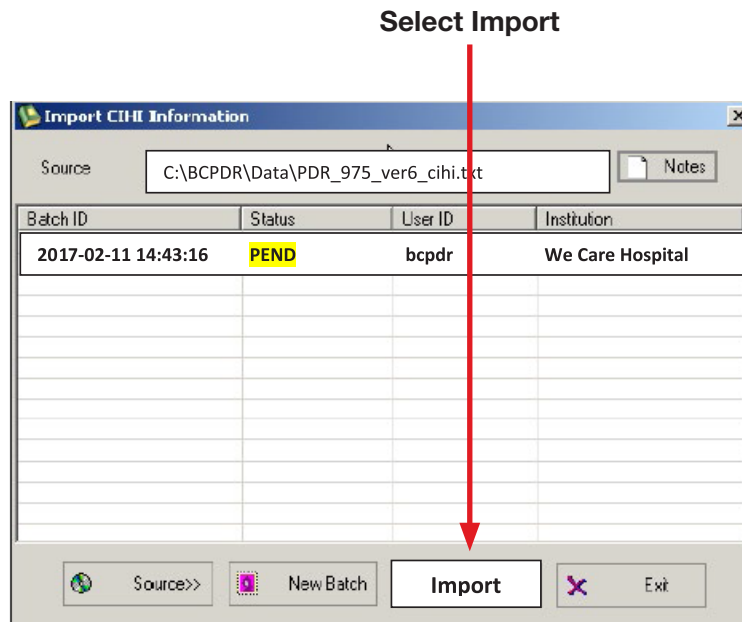
- i) The **Enter Notes** screen will appear. It is **mandatory** to enter information in this field (e.g. Information entered could include the period, the date range of your file, etc.). Then select **OK**.



- j) The **Import CIHI Information** screen reappears and the **Batch ID**, **Status**, **User ID**, and **Institution** fields are now displayed on the screen.

NB: The Status will show as **PEND (pending) until the import is completed.**

To import the CIHI data from the CIHI text file into the BCPDR, select **Import**.



- k) After selecting the **Import** button, a progress bar will appear at the bottom left corner of the screen.



- l) Once the Import is complete, the **BCPDR Transfer Program** screen displays the number of records imported successfully.

NB: Take note of the number of records imported successfully before selecting OK to close the screen. Once the screen is closed, it is not retrievable.

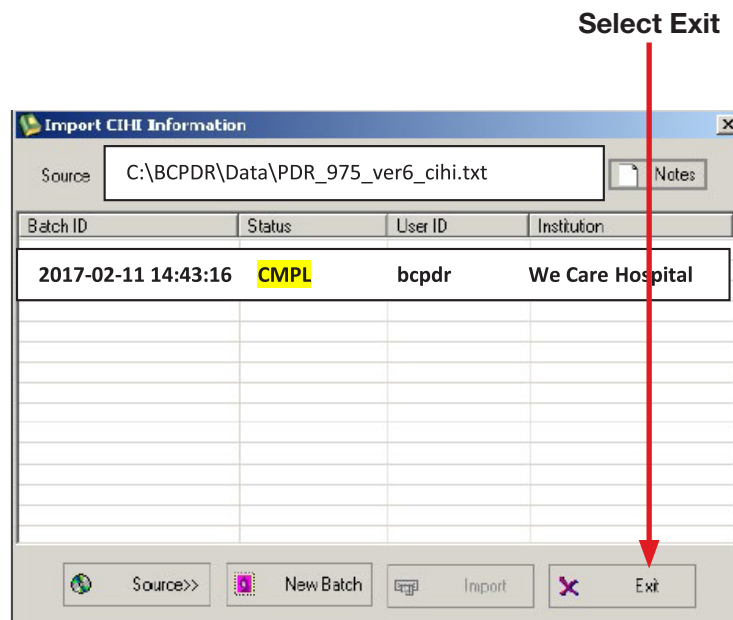
Example: 62 out of 80 Mother Records Imported



- m) The **Import CIHI Information** screen will reappear.

NB: The Status will show **CMPL (complete).**

Select **Exit** to close the **Import CIHI Information** screen.



8.2.3.5 Reviewing and Correcting CIHI Import Rejections

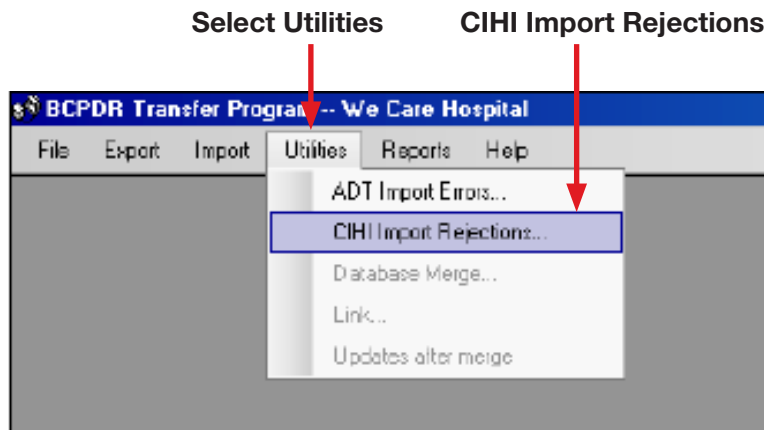
The CIHI data has now been imported into the BCPDR's CIHI screen. Some cases may not have imported successfully due to a mismatch on key fields.

The CIHI Import only occurs when there is an exact match on the following key fields:

1. **Chart Number**
2. **Date of Birth**
3. **Personal Health Number (PHN)**
4. **Admission Date**
5. **Discharge Date**
6. **Sex (applicable only for the Baby Newborn *and* Baby Transfer/Readmission Suites)**

The CIHI records from your CIHI text file that **DID NOT** match the **five or six key fields** from the BCPDR will be shown in the CIHI Import Rejections Table.

- a) From the **BCPDR Transfer Program** screen, select **Utilities** from the menu bar, then select **CIHI Import Rejections**.

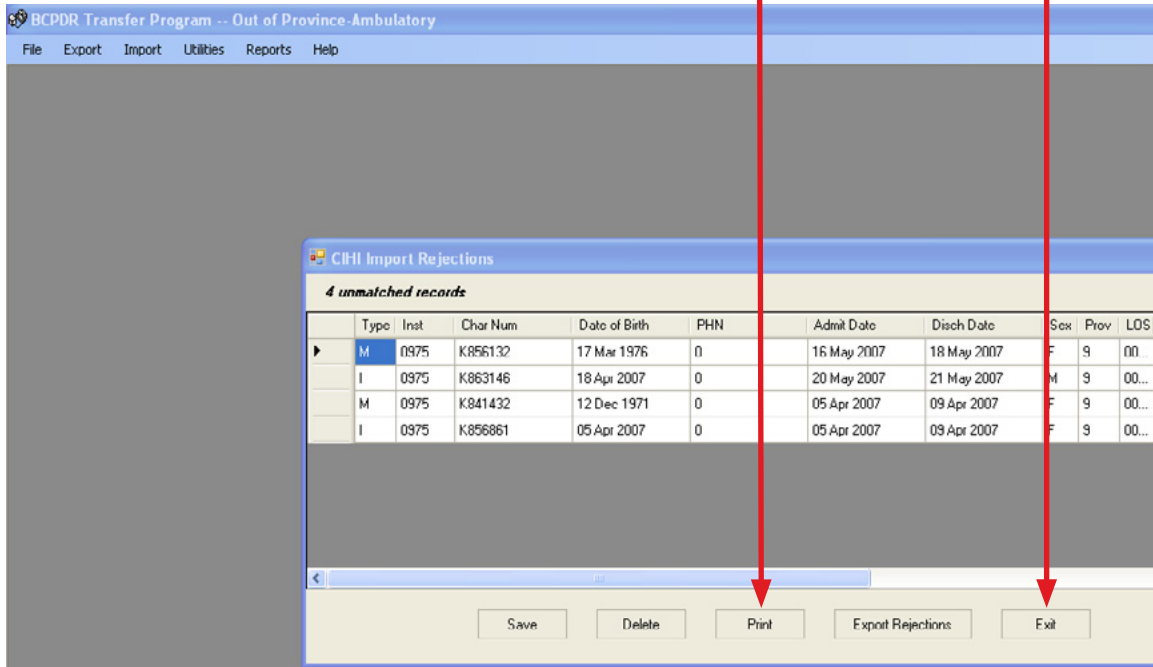


- b) The **CIHI Import Rejections** screen will only appear if there are unmatched records.

NB: DO NOT EXIT from the CIHI Import Rejections Table even if you prefer to review and work from a hard copy. CIHI import rejections will need to be corrected from the CIHI Import Rejections table. For a hard copy, select Print.

Select Print
for a hard copy

DO NOT EXIT
from this table
even when
working from
a paper copy



- c) Below is an example of a printed version of a CIHI Import Rejections report from the CIHI Import Rejections Table.

March 7, 2012 3:47:24PM

CIHI Import Rejections

Inst	Type
0975	I

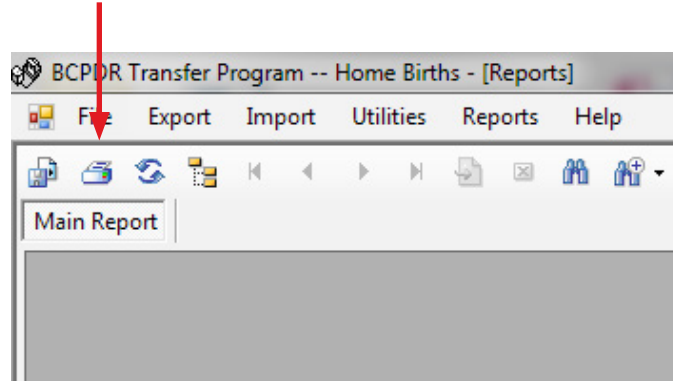
Chart #	DOB	Dis. Date	PHN	Sex	Admit Date	Serv.	Prsv	Inst From	Inst To	Postal Code	Weight
K856861	20070405	20070409	0	F	20070405	54	9			V3E3J4	3646
K863146	20070418	20070521	0	M	20070520	20	9			V3C1Z1	0000

Inst	Type
0975	M

Chart #	DOB	Dis. Date	PHN	Sex	Admit Date	Serv.	Prsv	Inst From	Inst To	Postal Code	Weight
K841432	19711212	20070409	0	F	20070405	51	9			V3E3J4	
K856132	19760317	20070518	0	F	20070516	53	9			V3C1Z1	

- d) To print out a hard copy, select the **Printer Icon** from the top left corner of the screen.

Select the Printer Icon

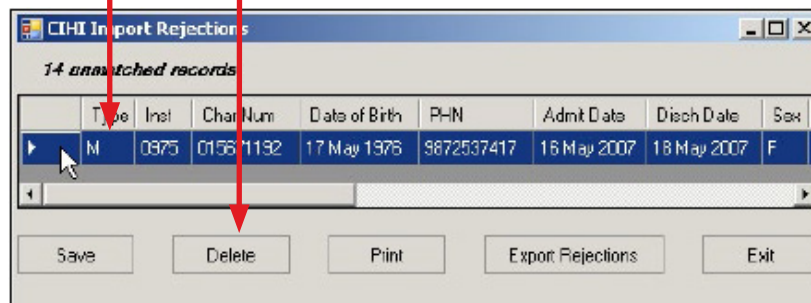


- e) Records identified on the Import Rejections Table must be addressed in order to complete the CIHI Import process. The most common import rejection errors are records that are out of the BCPDR scope and mismatches on the key fields. The following steps outline how to correct the most common import rejections.

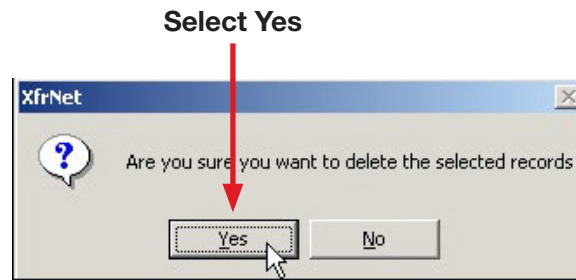
- Review the CIHI Import Rejections Table and identify CIHI records that **DO NOT MEET** the BCPDR Scope.
Example: Records with a Patient Service of 53 (Obstetrics Aborted) and a Gestational Age of <20 weeks.
- Records that are out of scope need to be deleted from the CIHI Import Rejections Table. To delete these records, **highlight the row of the identified record** on the CIHI Import Rejections Table on the screen, then select **Delete**.

Highlight the row of the record to be deleted

Then Select Delete

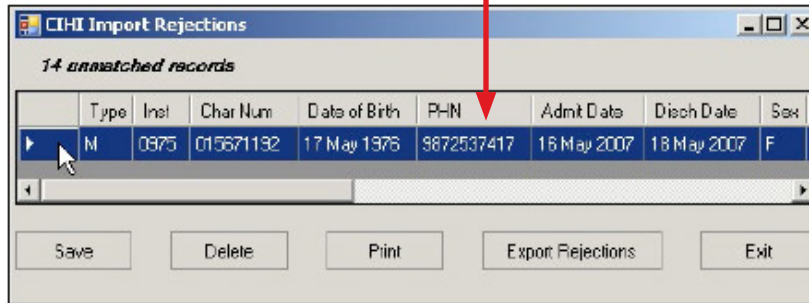


- Select **Yes** to confirm the deletion.



- f) After deleting all records that are out of the BCPDR Scope from the CIHI Import Rejections Table, you can begin to review the remaining records to identify mismatches on the five or six key fields.
- Keep the CIHI Import Rejections Table open on your screen, and open the **Data Collection application** in the BCPDR.
 - In the BCPDR, open the appropriate suite and open the record identified in the Import Rejections Table.
 - To identify mismatched fields, compare the following key fields from the BCPDR record with the fields in the CIHI Import Rejections Table.
 1. **Chart Number**
 2. **Date of Birth**
 3. **Personal Health Number (PHN)**
 4. **Admission Date**
 5. **Discharge Date**
 6. **Sex (applicable only for the **Baby Newborn and Baby Transfer/Readmission Suites**)**
 - Once the mismatch is found, determine if the information is correct in the CIHI Import Rejections Table or the BCPDR record.
 - If the error is in the BCPDR, **CORRECT the record with the error** in the Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum suites. Then **Save** and **Validate** the record.
 - If the error is on the CIHI Import Rejections Table, **CORRECT the field(s) with the error** and in your hospital's Health Record Abstracting system (e.g. WinRecs or 3M). Click (with your cursor) in the desired field and edit as required.

Example: For PHN errors–Click on the PHN field and edit



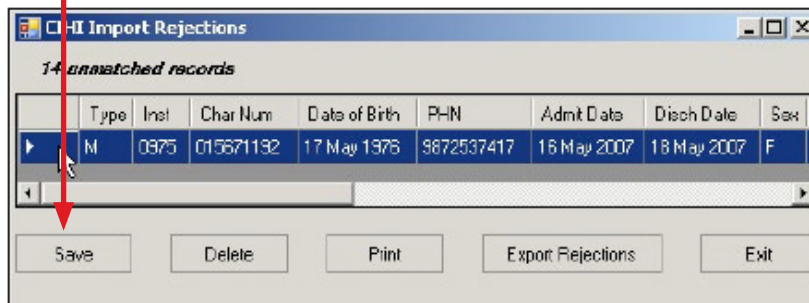
NB: Baby Transfer/Readmission suite Import Rejections – Confirm if the record is for one of the following scenarios:

- **Babies born at home attended by a Registered Midwife/Physician OR**
- **Babies born at home without a Registered Midwife/Physician and transferred >24 hours after birth.**

Delete suffix "54" from the PHN (if applicable)

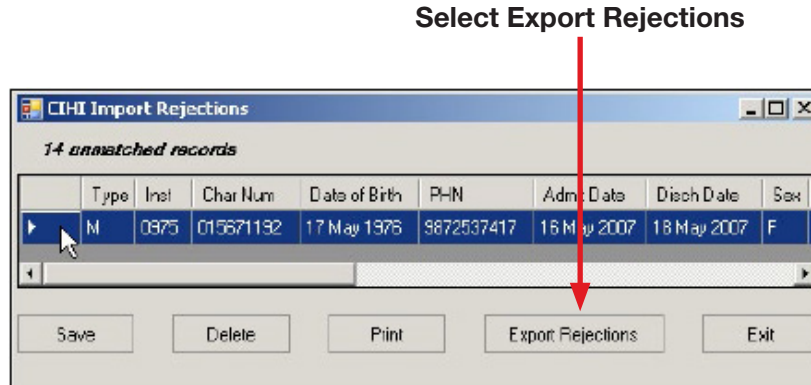
- Select **Save** after completing all the corrections in the CIHI Import Rejections Table.

Select Save after completing all the corrections

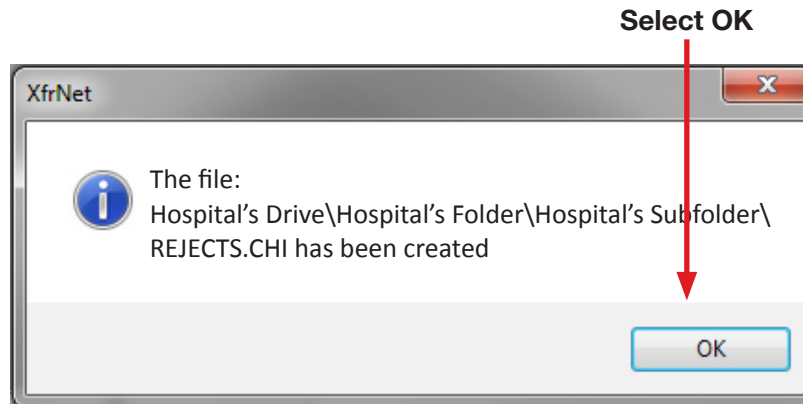


8.2.3.6 Exporting Rejections to Create a REJECTS.CHI File

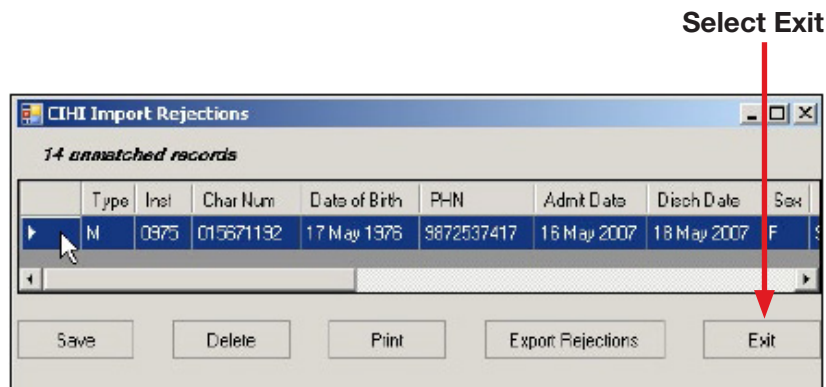
- a) Select **Export Rejections** from the CIHI Import Rejections table after all the deleted and corrected records from the table are completed and saved.



- b) A **XfrNet box** screen will appear to note that the corrected records are saved as a **REJECTS.CHI** file in your hospital's default folder (Hospital's Drive\Hospital's Folder\Hospital's Subfolder). **Make note of where your file is saved.** Select **OK**.



- c) Select **Exit** to close the CIHI Import Rejections Table.



8.2.3.7 Importing the REJECTS.CHI File

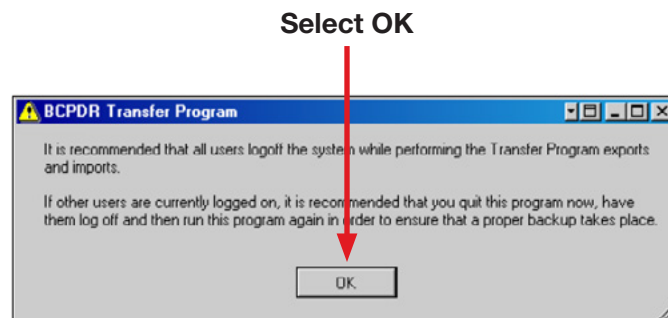
The REJECTS.CHI file contains the corrections made on the CIHI Import Rejections Table. This file must be imported into the BCPDR to clear the errors and bring in the corrected CIHI data into the BCPDR CIHI screen.

- a) Select **Transfer Programs** from the Perinatal Database Registry application menu:

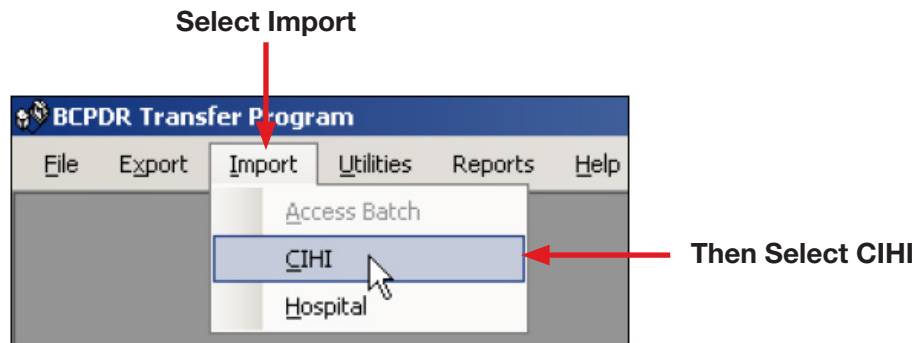


- b) The **BCPDR Transfer Program** screen will appear to prompt all users to log off the system before exporting and importing.

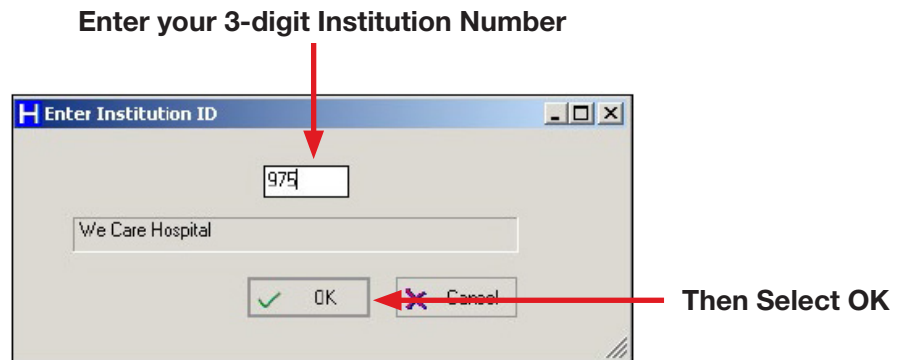
NB: If your facility is part of a merged database system in your Health Authority, all users are not required to log off the system while performing the Period Submission process.



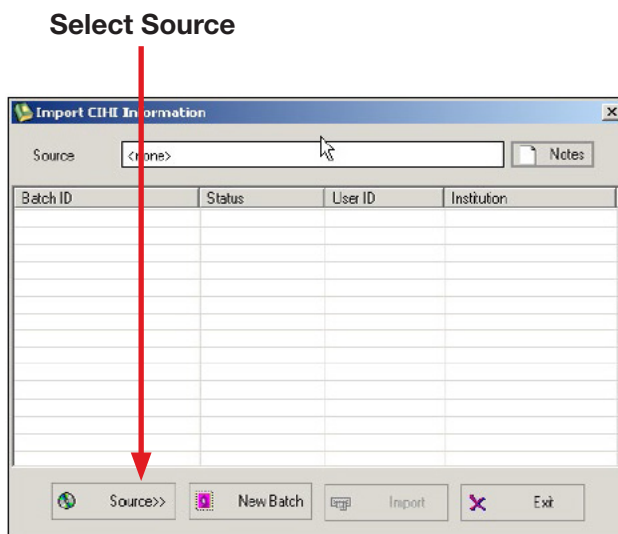
- c) From the **BCPDR Transfer Program** screen, select **Import** from the menu bar. Then select **CIHI**.



- d) The **Enter Institution ID** screen will appear. **Enter your 3-digit Institution Number**. The corresponding Institution Name will also display. Select **OK**.



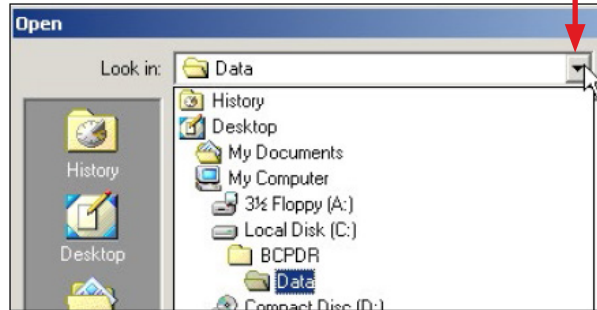
- e) The **Import CIHI Information** screen will appear. Select **Source** to retrieve your **REJECTS.CHI** file that had been exported to your hospital's drive and folder.



f) The **Open** screen will appear.

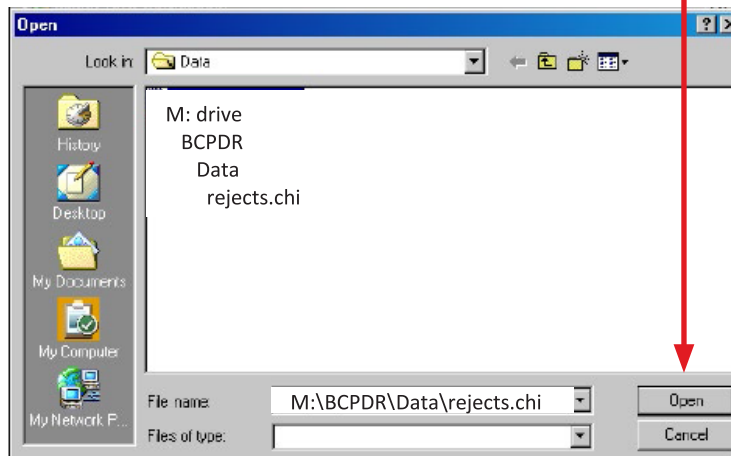
From the **Look In:** field, select the down arrow. Then **scroll down** until your **REJECTS.CHI** file is located in your hospital's drive and folder.

Select the down arrow. Scroll until you locate the **REJECTS.CHI** file



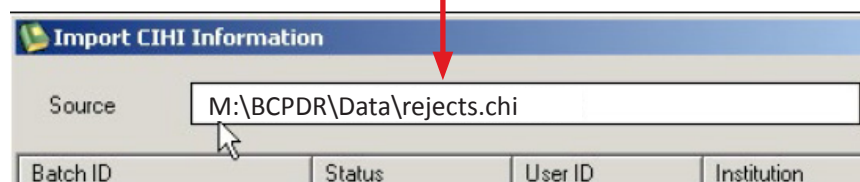
g) Select **Open** after locating the **REJECTS.CHI** file from your hospital's drive and folder.

Select **Open**

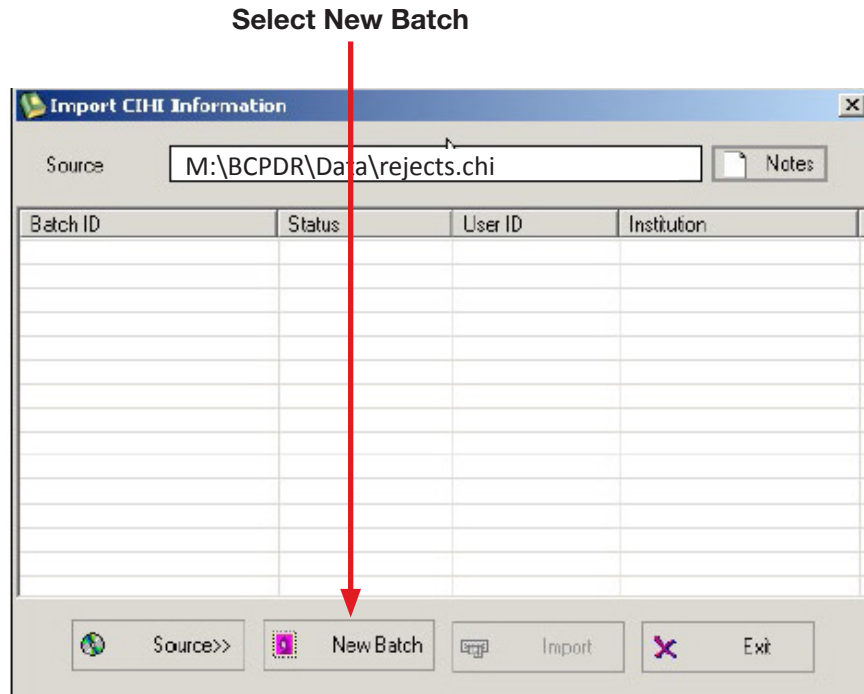


h) The **Import CIHI Information** screen will reappear. The selected path and file name is now displayed in the **Source** field.

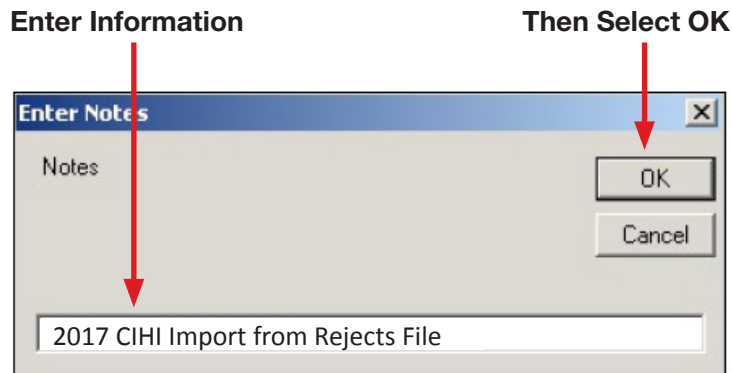
Path and file name is now displayed in the **Source** field



- i) Select **New Batch** from the **Import CIHI Information** screen.



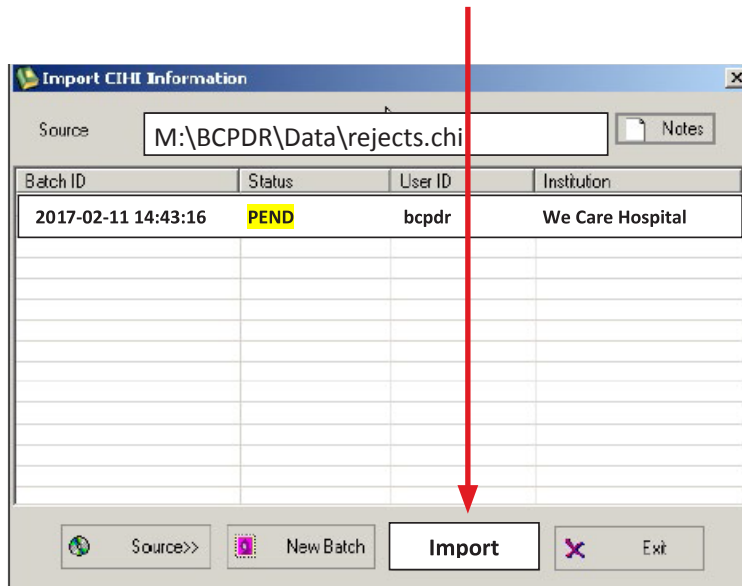
- j) The **Enter Notes** screen will appear. It is **mandatory** to enter information in this field. (e.g. 2017 CIHI Import from Rejects File.) Select **OK** after entering your note.



- k) The **Import CIHI Information** screen will reappear and the **Batch ID, Status, User ID, and Institution** fields are now displayed on the screen.
NB: The Status will show as **PEND (pending) until the import is completed.**

Select **Import** to import the CIHI data from the REJECTS.CHI file into the BCPDR's CIHI screen.

Select Import



l) After selecting the Import button, a progress bar will appear at the bottom left corner of the screen.



m) When the import is complete, the **BCPDR Transfer Program** screen will display the number of records imported successfully. Review the number of records imported to determine if the CIHI Import cycle is complete or incomplete.

- **Complete CIHI Data Import:** In the example below, all records (18/18 Mothers and 12/12 Babies) have been successfully imported. This is a complete CIHI import and indicates all import rejections have been corrected and imported into the BCPDR.

Example of a complete import of CIHI data in BCPDR CIHI screens



- **Incomplete CIHI Data Import:** In the example below, there are still 18 Mother records and 12 Baby records that are still missing CIHI data in the BCPDR's CIHI screens. This is an **incomplete** CIHI import and indicates there are outstanding import rejections that need to be corrected.

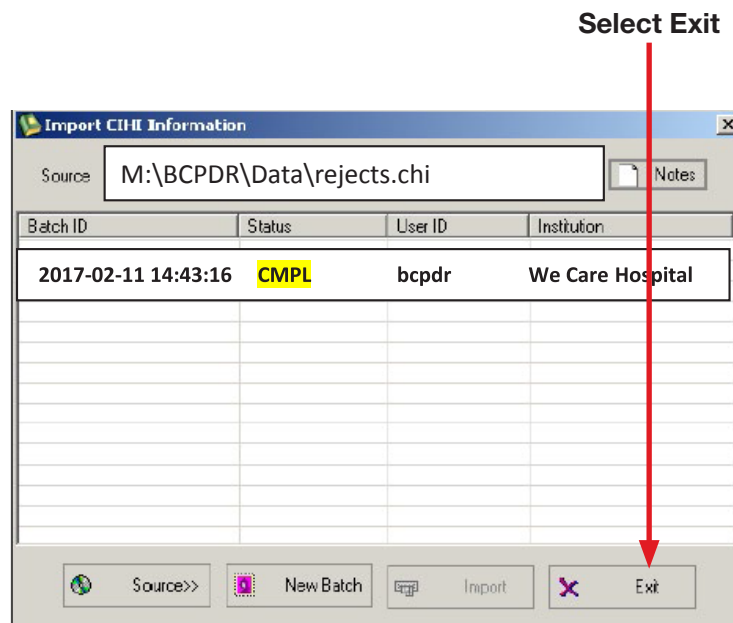
Example of an incomplete import of CIHI data in BCPDR CIHI screens



NB: Identify the number of records imported successfully before selecting OK to close the screen. Once closed, the screen is not retrievable.

n) **Complete CIHI Data Import:**

- All CIHI data have been successfully imported into the BCPDR's CIHI screen. There are no more unmatched records remaining. Select Exit.



- Refer to [Section 8.2.3.8](#) to run your data quality checks from the BCPDR Data Quality Tool if the tool is installed in your facility.
- Refer to [Section 8.2.3.9](#) if the BCPDR Data Quality Tool is not installed in your facility.

o) **Incomplete CIHI Data Import:**

- All CIHI data have not been successfully imported into the BCPDR's CIHI screens. More unmatched records remain.
- After exiting from the Import CIHI Information screen, **repeat sections 8.2.3.5 to 8.2.3.7 until all CIHI data are successfully imported into the BCPDR CIHI screen.**

NB: The corrected data from this cycle of corrections overwrites the previous records from the previous REJECTS.CHI file.

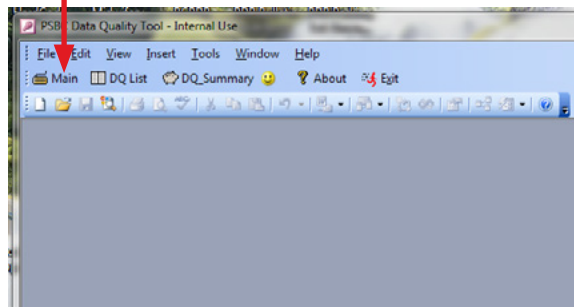
8.2.3.8 Performing Data Quality Checks from the BCPDR Data Quality Tool (if installed at your facility)

Extra data quality checks are performed to ensure that the CIHI data from the BCPDR's CIHI screen that was either imported or manually entered matches the data abstracted in all the BCPDR suites – Mother, Baby Newborn, Baby Transfer/Readmission, and Postpartum. To minimize the number of data quality errors for your facility at the end of each period, quarter or fiscal year, review and correct all errors from the BCPDR Data Quality Tool's data quality report **before reviewing and checking for more Unlinked, Discharged not Validated or CIHI not Imported** cases from the BCPDR's Period End Reports.

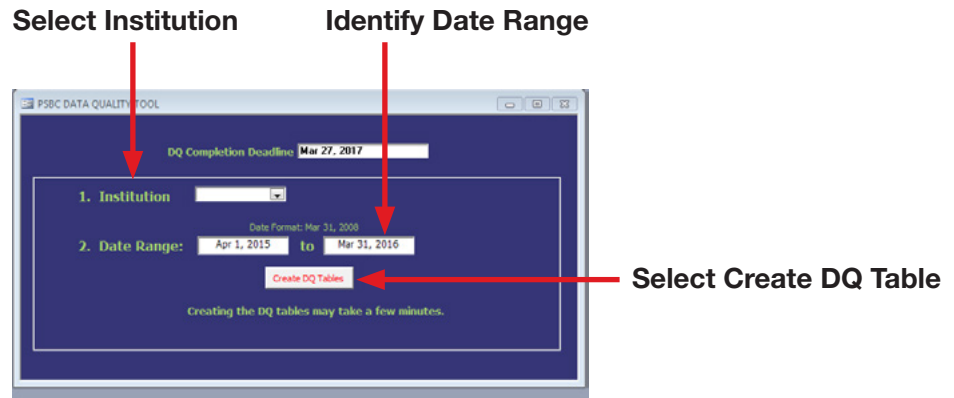
Running your Data Quality Tool will also allow you to identify which data quality edits from the report are acceptable and should therefore be excluded from your data set.

- a) To run the application, open your Data Quality Tool and select **Main**.

Select Main



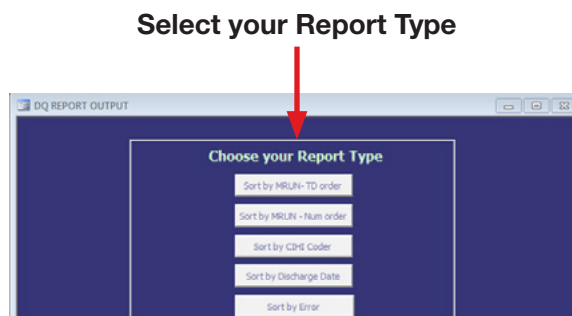
- b) The PSBC DATA QUALITY TOOL screen will appear. Select your **Institution** and the **Date Range** (which could be your period, quarter or fiscal year) of your facility's data set. Then select **Create DQ Tables** to run the data quality report.



- c) A message will appear: "Data Tables Completed. Press OK to continue." Select **OK**.



- d) The DQ REPORT OUTPUT screen will appear and will ask you to select your report type.



e) A Data Quality Report will appear. **View** or **Print** your selected report.

NB: The selected report, at minimum, will identify the following: Error Id, Mother and/or Baby MRN, PHN, Coder, Suite, PatID, DC Date, Seq, and Error Message.

Example of a data quality report from the Data Quality Tool

B.C. PERINATAL DATABASE REGISTRY - DATA QUALITY						
976 - Home Births						
DATE RANGE FOR INCLUSION CRITERIA: Apr 1, 2015 To Mar 31, 2016						
Please review and export revisions to PDR by: Mar 27, 2017						Sent: Monday, March 06, 2017
MOTHER MRUN:		MOTHER PHN:		BABY MRUN:		BABY PHN:
Suite	PatID	Discharge Date	Seq	Error ID	Error Message	Coder:

f) From the Data Quality Tool's data quality report, review and correct all identified errors in the appropriate BCPDR suites – Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum.

- **Save** and **Validate** all corrected records.
- For data quality edits that do not require corrections, identify and write down the **reason for exclusion or as an exception** for those edits on your report.

g) Submit these reports, with reason for exclusion or as an exception, to Product Support via your shared folder or secure FTP.

h) Close the Data Quality Tool application when this process is complete.

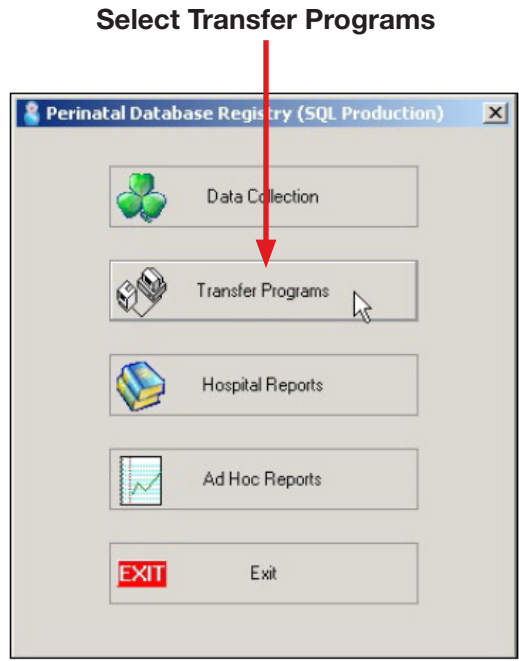
8.2.3.9 Performing BCPDR Data Quality Checks from Period End Reports

After successfully importing all of your CIHI data into the BCPDR's Mother, Baby Newborn, Baby Transfer/Readmission, and/or Postpartum suites, data quality checks must be completed to identify records that are still:

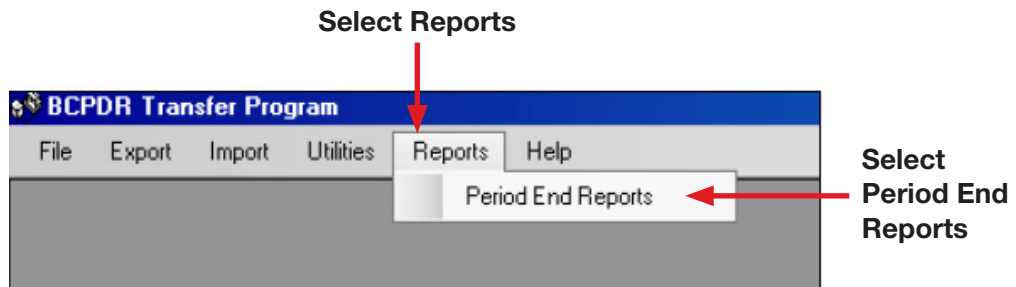
- Unlinked
- Discharges are Not Validated
- CIHI not Transferred

Records identified in this process **MUST** be reviewed and corrected in the BCPDR.

a) Select the **Transfer Programs** application.



b) From the BCPDR Transfer Program screen, select **Reports** from the menu bar. Then select **Period End Reports**.



c) The **Report** screen will appear. This is the screen where you will be running and viewing the **six** Period End Reports, one at a time, for any errors that will require corrections in the PDR:

- Unlinked Babies (Newborn and Transfer)
- Unlinked Mothers
- Discharges not Validated (Babies)
- Discharges not Validated (Mothers)
- CIHI not Transferred (Babies)
- CIHI not Transferred (Mothers)

Period End Reports

Report

Institution
975 We Care Hospital

Period End Reports

Unlinked Babies (Newborn and Transfer) Unlinked Mothers
 Discharges not Validated (Babies) Discharges not Validated (Mothers)
 CIHI not Transferred (Babies) CIHI not Transferred (Mothers)

Start Date End Date

Period End Summary Batch ID

View Print Close

d) To Run and View each report:

- Select the correct institution using the down arrow.
NB: Skip this process if the institution field is correct.

From the down arrow, select the correct institution

Report

Institution
975 We Care Hospital

- Select **one radio button** at a time to run and view the selected Period End Report.
- Enter the **Start Date** and the **End Date** for the date range of your period(s), quarter or fiscal year.

Select a report

Report

Institution
975 We Care Hospital

Period End Reports

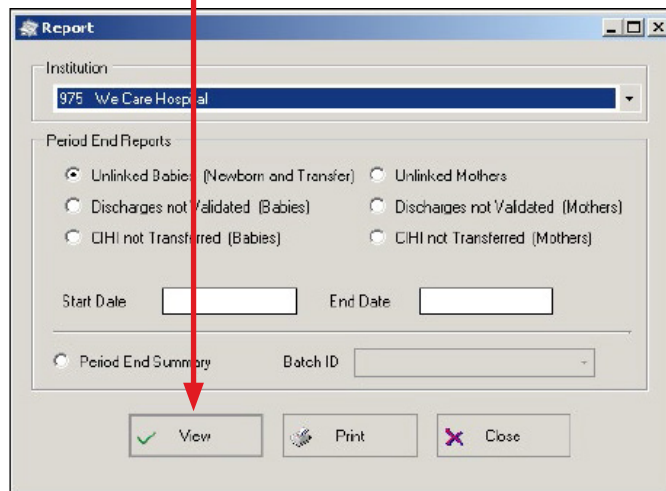
Unlinked Babies (Newborn and Transfer) Unlinked Mothers
 Discharges not Validated (Babies) Discharges not Validated (Mothers)
 CIHI not Transferred (Babies) CIHI not Transferred (Mothers)

Start Date End Date

Enter Start Date Enter End Date

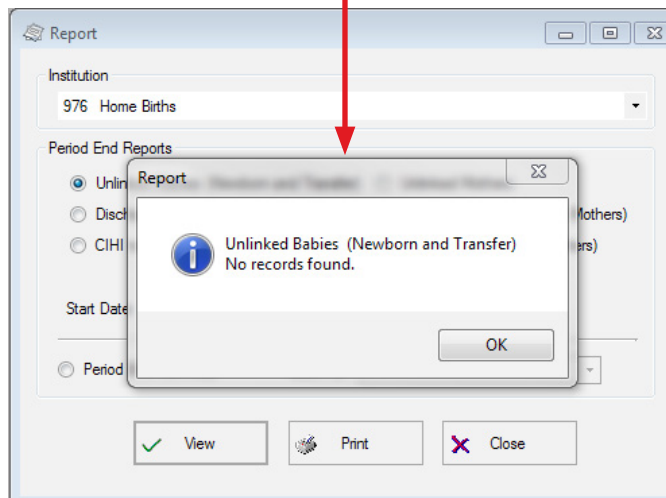
- Select **View** to run and view the report.

Select View



- A **Report** box will appear if no records are found to be Unlinked, Discharges not Validated, and/or CIHI not Transferred.

Example: This report screen will appear if no errors are found



- If errors are found, refer to Part e) for instructions on how to correct for these errors.

Example: This report will appear if errors are found



Unlinked Babies (Newborn and Transfer)				
Report Date: From 01-Apr-2007 To 26-May-2007				
Out of Province Ambulatory				
Source	Chart #	Disch Date	Surname	Coder #
		01-Apr-2007		20
		01-Apr-2007		20
MRNs		01-Apr-2007	Surnames	20
		09-Apr-2007		20
		09-Apr-2007		20
		11-Apr-2007		20
		11-Apr-2007		47
		11-Apr-2007		47
		11-Apr-2007		20
		18-May-2007		20
Total	10			

- e) The following statements are general guidelines for linkage, validation, and CIHI not transferred errors.

Unlinked Mother and Unlinked Baby Records:

- Always link records from the Baby Newborn suite.
- If the mother delivers twins, two Baby Newborn suite records should be linked to the Mother suite record.
- **Always Save** and **Validate** all completed records.

NB: Please note that some records may not be linked, particularly for cases where the mother had already been discharged and the baby has not yet been discharged. In these types of cases, it is acceptable for the mother record not to be linked to the baby record at the time of your period submission.

Discharges Not Validated for Mother and Baby Records:

- **Save** and **Validate** all completed records.
- Records that are **NOT Saved and Validated** will **NOT be EXPORTED** into your hospital's data file.

CIHI Not Transferred for Mother and Baby Records:

- **Manually abstract the CIHI data in the BCPDR CIHI screen** for the specific record in the Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum suites.
- Records with **missing CIHI data in the BCPDR's CIHI screen** will **NOT be EXPORTED** in your hospital's batch (data) file.
- **Check and delete all duplicate records** from the Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum suites .
NB: Refer to Section 7.3, Deleting a Record, in the Reference Manual for instructions on deleting duplicate records.

f) Re-Run and View Unlinked, Discharge not Validated, and CIHI not Transferred Period End Reports

- After correcting your records from the error reports, **refer back to Part c) from this section to re-run and view** each of the Period End Reports again.
- If there are more errors **refer back to Part e) from this section to correct these errors.**
- Continue to run, view, and correct these errors until all the errors are cleared for each of the Period End Reports.

NB: If they are acceptable errors, you may ignore these errors.

8.2.3.10 Exporting Completed and Corrected Records into a Batch (Data) File

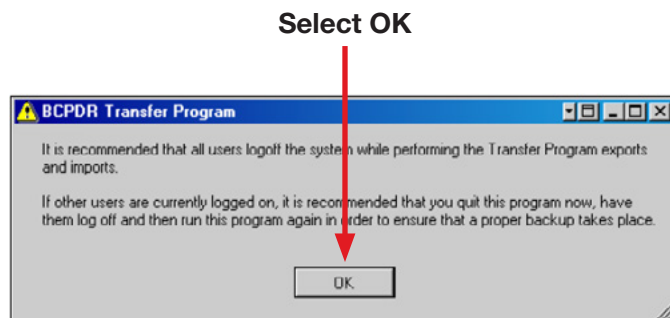
After successfully completing and correcting your records from the Mother, Baby Newborn, Baby Transfer/Readmission and/or Postpartum suites, a new batch (data) file for exporting can now be created for all your BCPDR records for your period, quarter or fiscal year.

- a) Select **Transfer Programs** from the Perinatal Database Registry application menu:

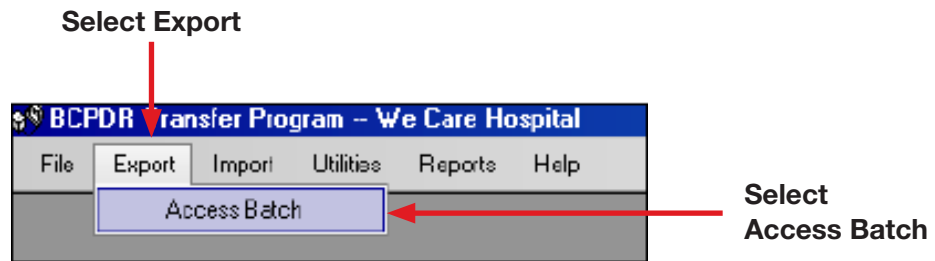


- b) The **BCPDR Transfer Program** screen will appear to prompt all users to log off the system before exporting and importing.

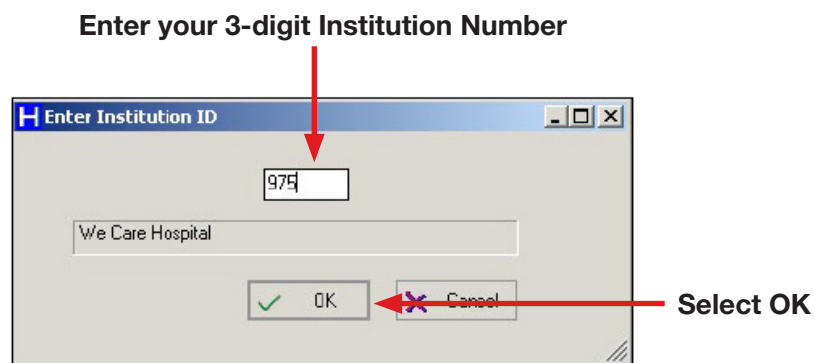
NB: If your facility is part of a merged database system in your Health Authority, all users are not required to log off your system while performing the Period Submission process.



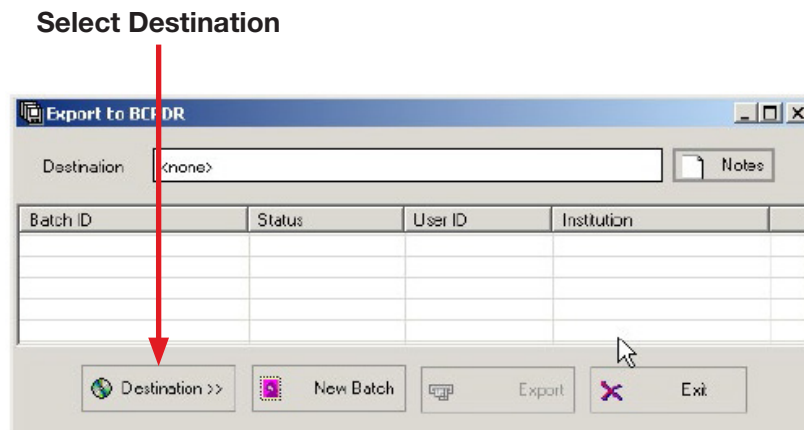
- c) Select **Export** from the menu bar. Select **Access Batch**.



- d) The **Enter Institution ID** screen will appear. Enter your **3-digit Institution Number** and then select **OK**.



- e) The **Export to BCPDR** screen will appear. Select **Destination** to identify where you will be saving your exported batch (data) file.

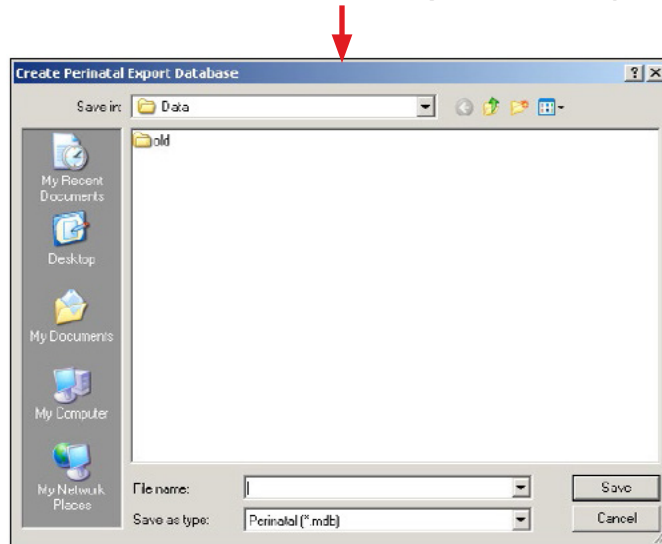


- f) The **Create Perinatal Export Database** screen will appear. From this screen, you will need to name your batch (data) file and to identify which network drive and folder you will be saving your exported batch (data) file.

Save in: Field – Select one of the three options below:

- For facilities that are utilizing the **CuteFTP** or **Filezilla** or **IpSwitch** application, select the down arrow from the Save in: field to identify which network drive and folder you will be saving your exported batch (data) file.
- For facilities that are **NOT defaulted to the O:drive** by PSBC, select the down arrow from the Save in: field to identify which network drive and folder you will be saving your exported batch (data) file.
- For facilities that **ARE defaulted to the O:drive or X:drive** by PSBC, the path has already been defaulted for your facility. Please **DO NOT change this default**.

Save in: field–Refer to one of the three options above to determine if your facility needs to select a network drive and folder to save the exported batch (data) file



File Name: field – For all facilities, enter the File Name of your data file. Please refer below for the naming conventions for your files.

- For a **period, quarter or fiscal year submission file**, please use the following naming convention:

Example: H975.16p2-3.mdb

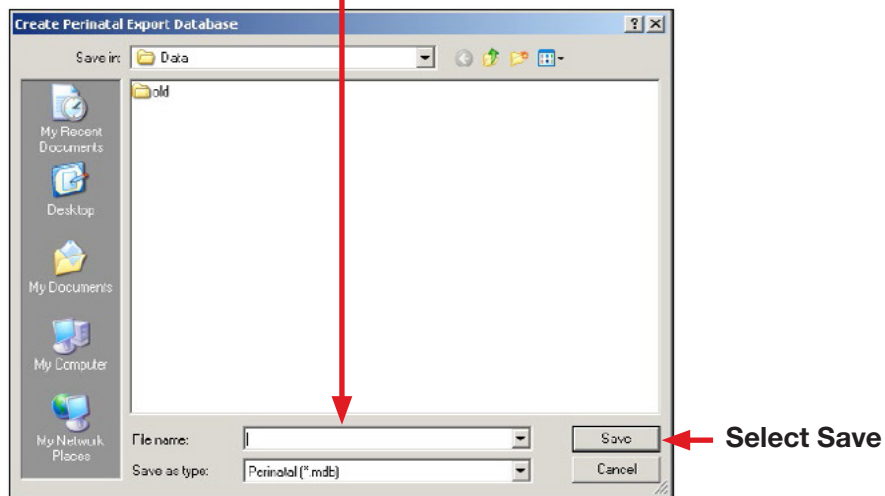
H	Hospital
975	3-Digit Institution Number
.16	Fiscal Year
p2-3	Identify the Period, Quarter or Fiscal Year after “p”
.mdb	Database File Name Extension

- For **Data Quality submission files**, please use the following naming convention:

Example: H975.16DQ1.mdb

H	Hospital
975	3-Digit Institution Number
.16	Fiscal Year
DQ1	Data Quality 1 (<i>NB: Name the file DQ2 if it is your next DQ file and DQ3, if it is another DQ file following DQ2, etc.</i>)
.mdb	Database File Name Extension

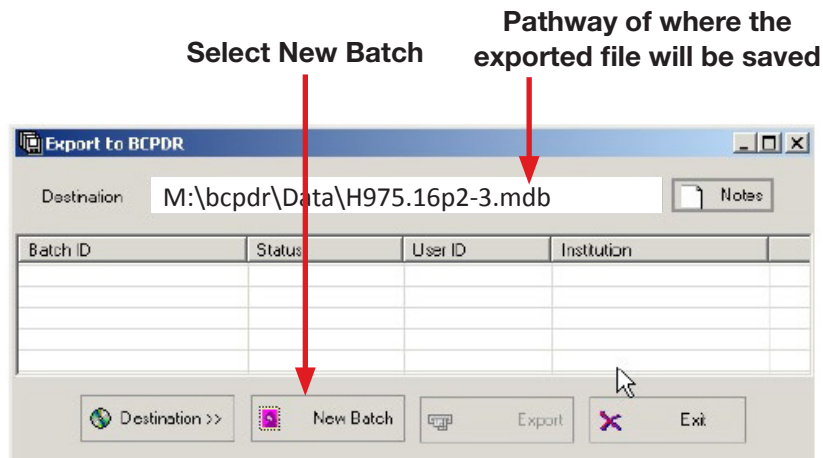
Enter your File name. Use the above naming conventions to name your exported data files.



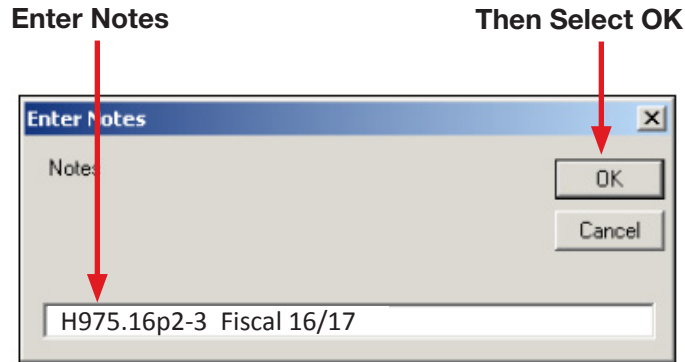
Check to ensure that the Save as type is **Perinatal(*.mdb)**. Select **Save**.

- g) The **Export to BCPDR** screen will reappear. Select **New Batch**.

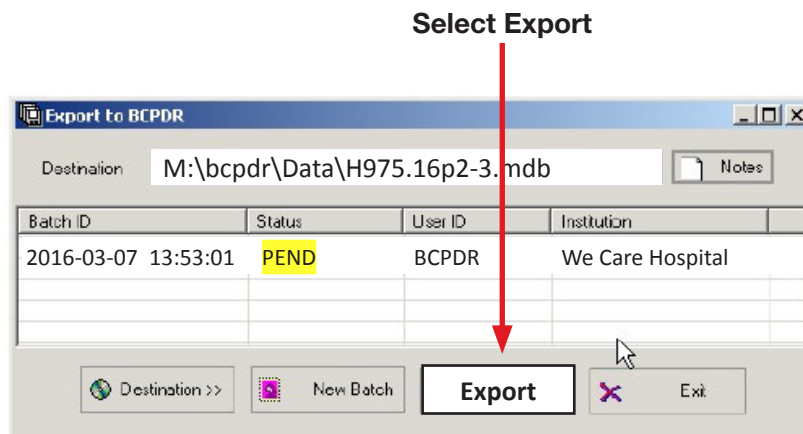
NB: The Destination field at the top of the screen is now complete with the pathway of where the exported batch (data) file will be saved.



- h) The **Enter Notes** screen will appear. It is **mandatory to enter in the Notes field** (e.g. Information entered could include the period, the date range of your file, etc.). Then select **OK**.



- i) The **Export to BCPDR** screen will reappear. Select **Export**.
NB: The Batch ID, Status, User ID and Institution is now displayed. The Status is noted as **PEND (pending) until the Export is complete.**

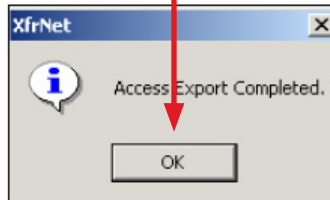


- j) During the Export, a progress bar will appear on the bottom left corner of the screen.



- k) The **XfrNet** screen will appear with a message, **Access Export Completed**, when the Export is completed. Select **OK**.

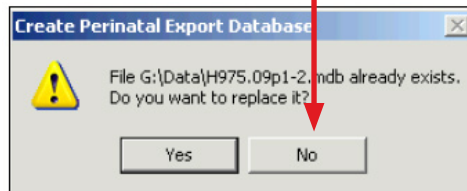
Select OK



- l) If a **Create Perinatal Export Database** screen (see below) **DOES NOT APPEAR** after selecting **OK**, refer to Part n) in this section to exit the Export to BCPDR screen.
- m) The **Create Perinatal Export Database** screen will appear if a file had been previously exported with the same file name.

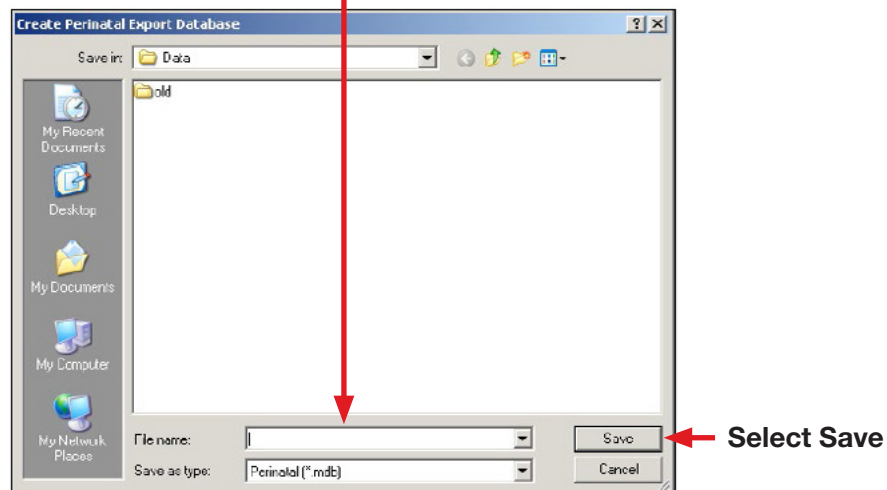
NB: DO NOT OVERWRITE THE FILE to replace it. ALWAYS Select NO.

ALWAYS Select NO



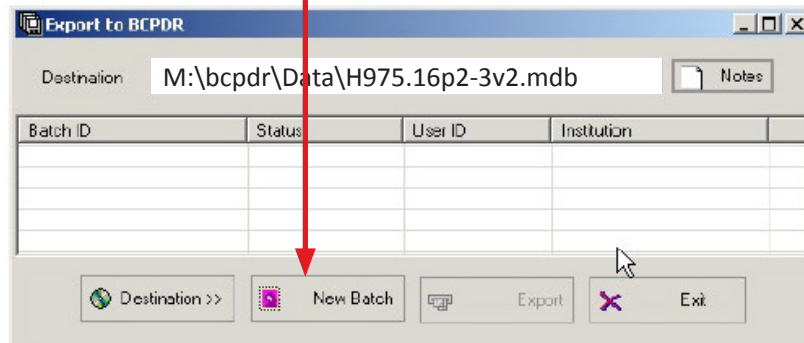
The **Create Perinatal Export Database** screen will reappear for you to rename the file. **Rename the file and then select Save.**

RENAME the file in the File name: field



The **Export to BCPDR** screen will reappear. Select **New Batch**.

Select New Batch

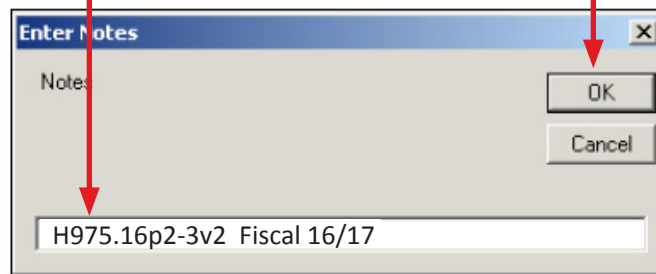


The **Enter Notes** screen will appear. It is **mandatory** to enter in the **Notes** field. An example would be to enter the file name with the fiscal period of the file.

Select **OK** after completing the field.

Enter Notes

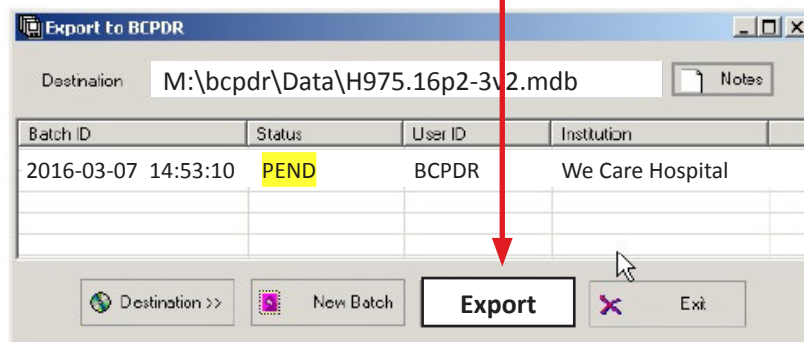
Then Select OK



The **Export to BCPDR** screen will reappear. Select **Export**.

NB: The Batch ID, Status, User ID and Institution is now displayed. The Status is noted as **PEND (pending) until the Export is complete**

Select Export

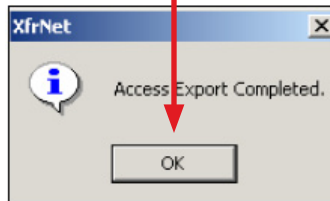


During the Export, a progress bar will appear on the bottom left corner of the screen.



The **XfrNet** screen will appear with a message, **Access Export Completed**, when the Export is completed. Select **OK**.

Select OK

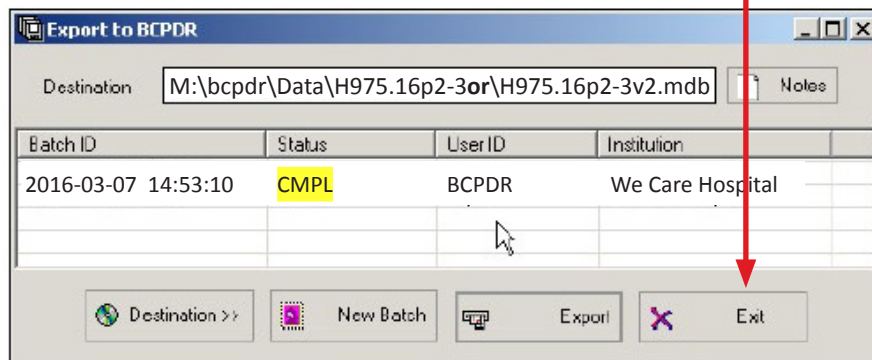


- n) The **Export to BCPDR** screen will reappear after the Export is completed. Select **Exit** to close the screen.

NB: The Status of the batch file now appears as **CMPL (complete)**

NB: Refer to the Destination field (see below) to identify where this batch (data) file is saved.

Select Exit when Export is Completed



- o) Please retain all your files for a year. It may be necessary to re-send the file at a later date.

NB: An Export File can only be created ONCE. Do not attempt to re-run another export on the same data. Call the Helpline if you are encountering exporting problems.

8.2.3.11 Retrieving the Period End Summary (Request for Payment) Report

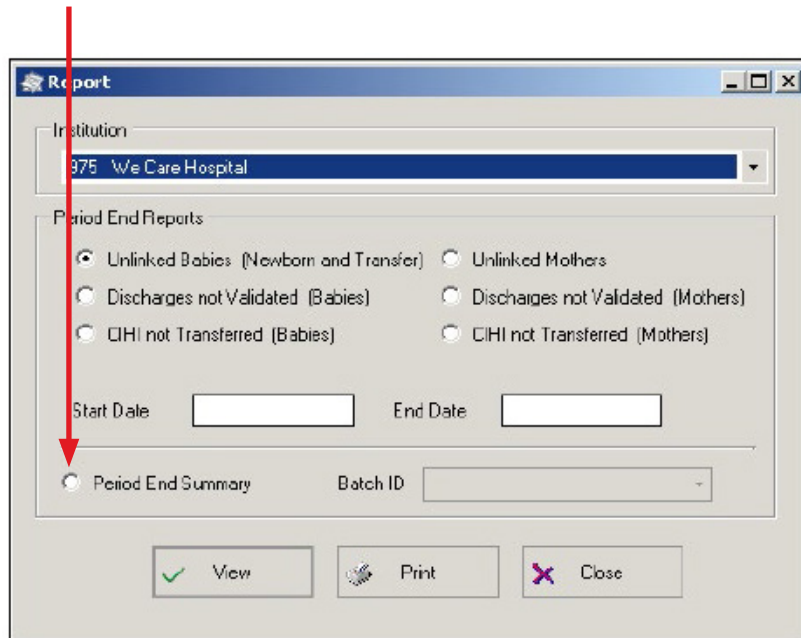
The Period End Summary is automatically generated when an export of your batch (data) file is complete. This form serves as your facility's reimbursement form for the exported data that is submitted to PSBC.

- a) From the **BCPDR Transfer Program** screen, select **Reports** from the menu bar. Then select **Period End Reports**.



- b) The **Report** screen will appear. Click on the **Period End Summary** radio button.

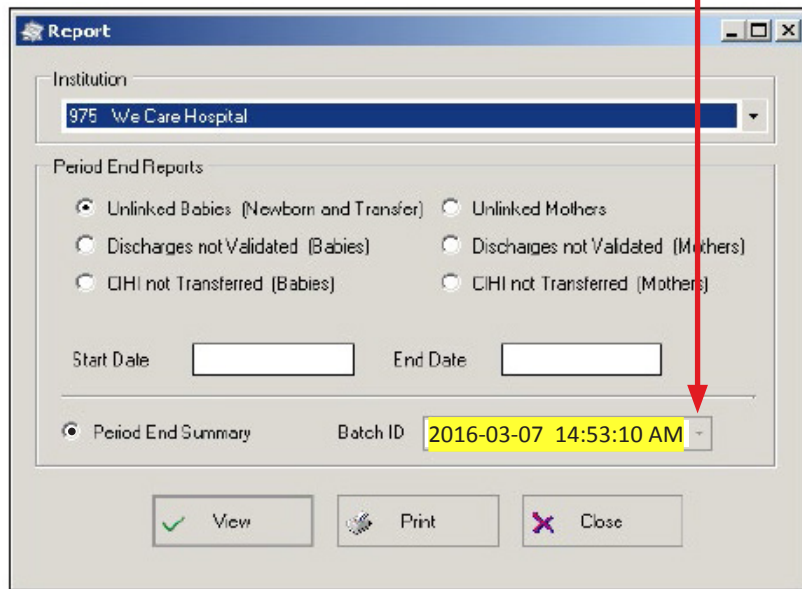
Click on the Period End Summary radio button



- c) In the **Batch ID field**, select the down arrow and identify the date and time of the export. The current date and time of the export will always be at the top of the listing.

NB: Only Batch IDs for the selected facility in the Institution field will appear in the listing.

Select the down arrow and click on date and time of the export

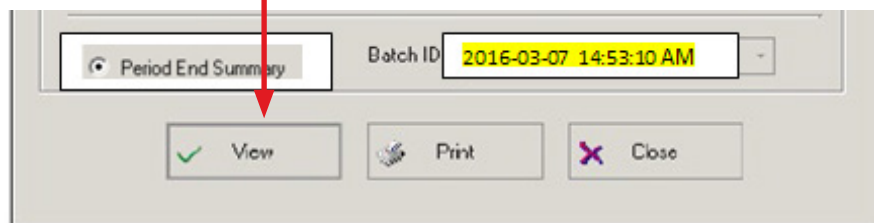


The screenshot shows a window titled "Report" with the following elements:

- Institution:** A dropdown menu showing "975 We Care Hospital".
- Period End Reports:** A section with several radio button options:
 - Unlinked Babies (Newborn and Transfer)
 - Unlinked Mothers
 - Discharges not Validated (Babies)
 - Discharges not Validated (Mothers)
 - CHI not Transferred (Babies)
 - CHI not Transferred (Mothers)
- Start Date:** An empty text box.
- End Date:** An empty text box.
- Period End Summary:** A radio button that is selected.
- Batch ID:** A dropdown menu showing "2016-03-07 14:53:10 AM". A red arrow points to the dropdown arrow on the right side of this field.
- Buttons:** Three buttons at the bottom: "View" (with a green checkmark icon), "Print" (with a printer icon), and "Close" (with a red X icon).

- d) Select **View** to view the Period End Summary on your screen.

Select View



This is a close-up of the bottom portion of the "Report" window. It shows:

- The **Period End Summary** radio button is selected.
- The **Batch ID** dropdown menu shows "2016-03-07 14:53:10 AM".
- The **View** button (with a green checkmark icon) is highlighted with a red arrow pointing to it.
- The **Print** and **Close** buttons are also visible.

- e) Below is an example of page 1 of a Period End Summary (Request for Payment) report. Use the report navigation button at the top of the screen to switch to page 2 of the Period End Summary (Request for Payment) report.



 A screenshot of a software application window. The window title is 'Main Report'. The menu bar includes 'File', 'Export', 'Import', 'Utilities', 'Reports', and 'Help'. The toolbar contains navigation icons. The main content area displays a report titled '976 Home Births REQUEST FOR PAYMENT'. The report includes the following information:

Date: 22-Feb-2017
 Invoice: BC PERINATAL DATABASE REGISTRY
 F-502 - 4500 Oak Street, Vancouver, BC V6H 3N1

Institution: **976 Home Births**
Health Records Department

Make Payment To:
 (include cost centre if applicable)

Attention:

0 Baby Newborn Records	@	\$10.00 =	\$0.00
0 Transfer/Readmission Records	@	\$3.00 =	\$0.00
0 Postpartum Mother	@	\$3.00 =	\$0.00
TOTAL			\$0.00 PAY THIS AMOUNT

BCPDR USE ONLY

BUSINESS UNIT
 FUND
 SITE
 DEPARTMENT
 ACCOUNT #
 AUTHORIZATION

Remit One Copy With Cheque To Health Authority

For Batch ID: 2/22/2017 7:23:25AM

Below is an example of page 2 of the Period Summary End (Request for Payment) report.

976 Home Births
REQUEST FOR PAYMENT
PERIOD END SUMMARY REPORT

Batch ID: 2/22/2017 7:23:25AM
Batch Notes: H976 15DQ7(a)

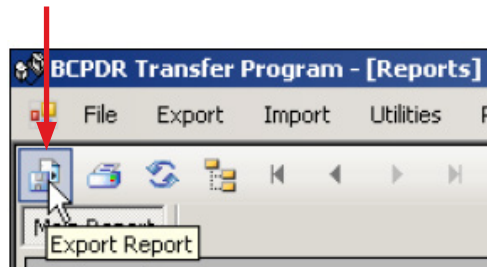
	1st SEND	RE-SEND	TOTAL
MOTHER	0	2	2
PP MOTHER	0	0	0
BABY NEWBORN	0	2	2
BABY TRANSFER/READMISSION	0	0	0

DISCHARGE DATE RANGE: Entire Database

Title	Service Code	# Of Cases
BABY SERVICES:	54	2
Total		2
MOTHER SERVICES:	51	2
Total		2

- f) To **SAVE** an **ELECTRONIC COPY** of the Period End Summary (Request for Payment) report, select **Export Report** (double square icon) from the top left corner of your screen.

Select Export Report

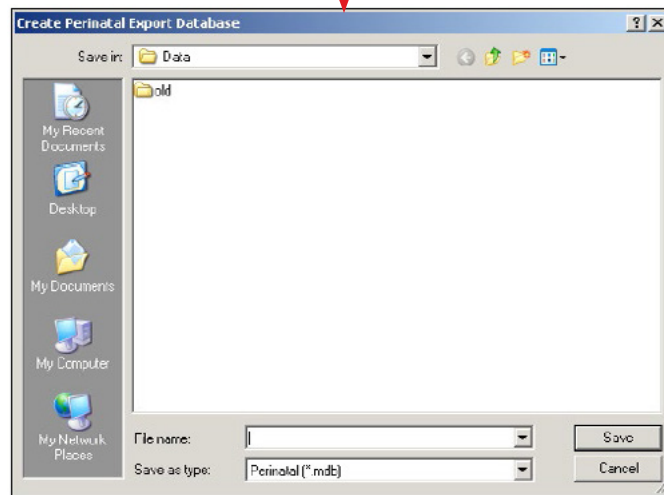


- g) The **Export Report** screen will appear.
From this screen, you will need to name your file and to identify which network drive and folder you will be saving your exported Period End Summary (Request for Payment) report.

Save in: Field – Select one of the three options below:

- For facilities that are utilizing the **CuteFTP** or **Filezilla** or **IpSwitch** application, select the down arrow from the Save in: field to identify which network drive and folder you will be saving your report.
- For facilities that are **NOT defaulted to the O:drive** by PSBC, select the down arrow from the Save in: field to identify which network drive and folder you will be saving your report.
- For facilities that **ARE defaulted to the O:drive or X:drive** by PSBC, the path has already been defaulted for your facility. Please **DO NOT** change this default.

Refer to one of the three options above to determine if your facility needs to select a network drive and folder to save the report



File Name: Field – For all facilities, enter the File Name of your data file. Please refer below for two examples of naming conventions for your files.

- **For a period, quarter or fiscal year submission file**, please use the following naming convention:

Example: H975.16p2-3.doc

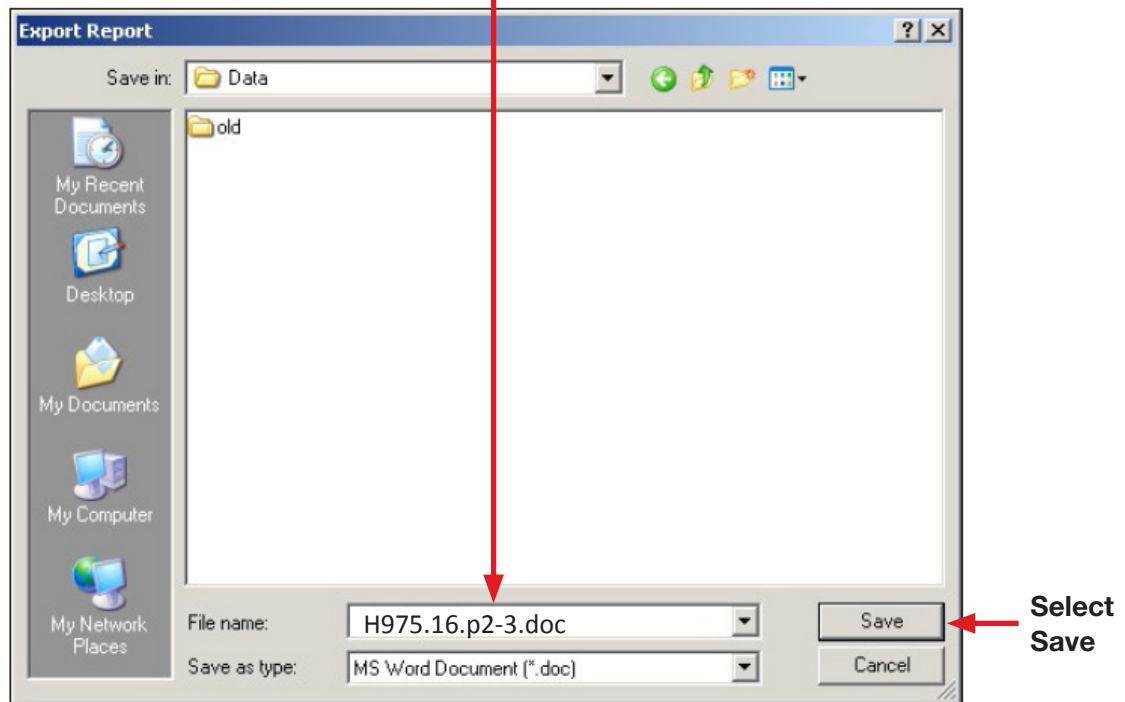
H	Hospital
975	3-Digit Institution Number
.16	Fiscal Year
p2-3	Identify the Period, Quarter or Fiscal Year after “p”
.doc	Document File Extension

- **For Data Quality submission files**, please adopt the following naming convention for all your data quality files:

Example: H975.16DQ1.doc

H	Hospital
975	3-Digit Institution Number
.16	Fiscal Year
DQ1	Data Quality 1 (<i>NB: Name the file DQ2 if it is your next DQ file and DQ3, if it is another DQ file following DQ2, etc.</i>)
.doc	Document File Extension

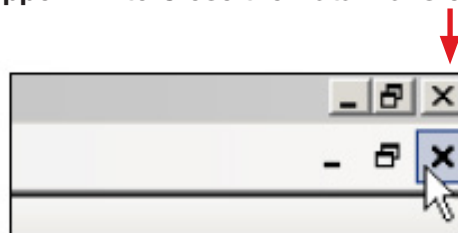
Enter your File name. Use the above naming conventions to name your Period End Summary Report.



Check to ensure that the **Save as type** is “MS Word Document (*.doc)”. Select **Save**.

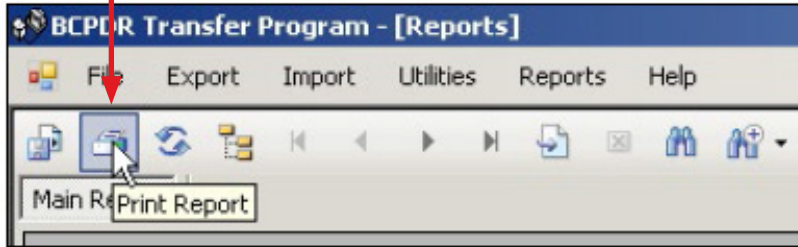
- h) To **close the Data Transfer application**, select the **Upper “X”** on the right side of the screen.

Select the Upper “X” to Close the Data Transfer Application



- i) To **PRINT** a **HARD COPY** of the Period End Summary (Request for Payment) report, select one of two methods:
- From the **BCPDR Transfer Program – [Reports]** screen, select the **printer icon** from the top left corner of your screen.

Select the Printer Icon



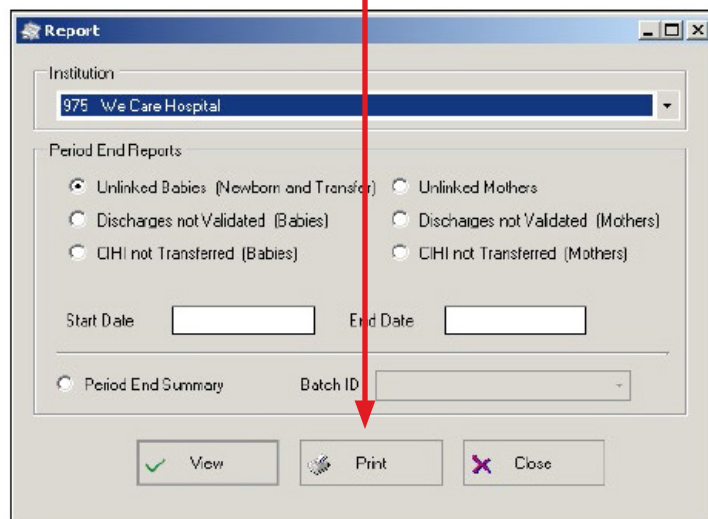
- From the **[Reports]** screen. Select the lower "X" from the **BCPDR Transfer Program – [Reports]** screen to close the screen.

Select the Lower "X"



- The **Report** screen will reappear. Select **Print**.

Select Print



8.2.3.12 Electronic Data and Period End Summary (Request for Payment) Report Submission

After exporting, the batch (data) file and Period End Summary are ready to be submitted to PSBC. Use one of the three methods noted below as per your facility in your health authority.

NB: Detailed instructions for electronic submissions of your data file and Period End Summary are available as a separate document.

- a) Submission by **CuteFTP** or **Filezilla** or **IpSwitch** application:
 - Login with your “Username” and “Password” to the **CuteFTP** or **Filezilla** or **IpSwitch** application.
 - Upload the appropriate batch (data) file and Period End Summary (Request for Payment) report from your folder in your hospital’s network drive to the PSBC folder.
 - Send an email to psbc@phsa.ca to notify the Product Support Analysts that a batch (data) file and Period End Summary are ready to be retrieved from your hospital’s folder in CuteFTP or Filezilla or IpSwitch.

- b) Submission of Files **NOT Defaulted to the O:Drive:**
 - Find the folder in your hospital’s network drive where you saved your batch (data) file and Period End Summary.
 - Copy and paste the batch (data) file and Period End Summary (Request for Payment) report to your facility’s shared folder on the O:drive.
 - Send an email to psbc@phsa.ca to notify the Product Support Analysts that a batch (data) file and Period End Summary are ready to be retrieved from your hospital’s shared folder on the O:drive.

- c) Submission of Files **Defaulted to the O:Drive or X:Drive:**
 - The batch (data) file and Period End Summary (Request for Payment) report has already been defaulted to your facility’s shared folder on the O:drive or X:drive at the time of exporting so no further action is required.
 - Send an email to psbc@phsa.ca to notify the Product Support Analysts that a batch (data) file and Period End Summary are ready to be retrieved from your hospital’s shared folder on the O:drive or X:drive.