

NEW HEALTH ANALYTICS



Section 5

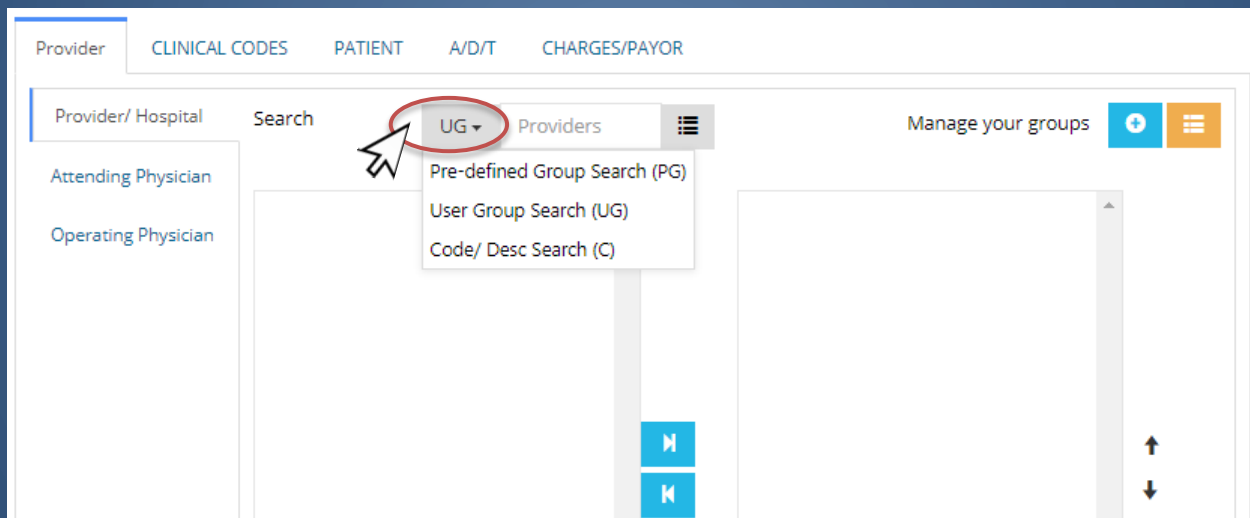
Using Groups in PCA Plus V2

Creating, saving, and managing filter groups for future use

Groups in PCA Plus

There are multiple options for grouping and saving filters for quick future use. This section of the manual will identify each option and walk you through the steps to create and manage your own filter groups.

Use the dropdown menu to change the group search display.



- User Group Search (UG)** displays groups you have made within your PCA account. This is the default.
- Pre-defined Group Search (PG)** are groups designed by New Health Analytics for certain systems, service lines, etc.
- Code/Desc Search (C)** will display all possible selections.

Pre-defined Group Search (PG)

The pre-defined group search (PG) setting will display commonly grouped filters or those that have been pre-programmed by New Health Analytics.

Groupings that can be found in the **pre-defined group (PG)** searches include:

- Provider / Hospital
- Payer groups
- Age groups
- Zip Codes & Counties
- AHRQ & MDC code groupings
- 3M service lines (as seen on right)

The screenshot displays the 'Pre-defined Group Search (PG)' interface. At the top, there are tabs for 'Provider', 'CLINICAL CODES', 'PATIENT', 'A/D/T', and 'CHARGES/PAYOR'. Below these, there is a search bar with 'APR-DRG Code(s)' and 'Search' labels. A dropdown menu is open, showing 'PG' selected and circled in red. To the right of the search bar, there is a 'Manage your groups' button with a plus sign and a menu icon. Below the search bar, there is a list of filters on the left, including 'Severity of Illness (SOI)', 'Risk of Mortality (ROM)', 'MS-DRG Code(s)', 'Principal Diag (DX1)', 'Principal Proc (PX1)', 'Primary Diag (DX1-5)', 'Primary Proc (PX1-5)', 'Secondary Diag (DX6-15)', 'Secondary Proc (PX6-15)', 'Select Diag Range', and 'Select Proc Range'. In the center, there is a list of 3M service lines, including '3M - Neurology', '3M - Neurosurgery', '3M - None Ungroupable', '3M - None-PrimDx Invalid', '3M - Obstetrics / Delivery', '3M - Oncology', '3M - Open Heart Surg', '3M - Ophthalmologic Surg', '3M - Ophthalmology', '3M - Orthopedic Surg', '3M - Orthopedics', '3M - Other Obstetrics', '3M - Otolaryngology', '3M - Psych Services', '3M - Pulmonary', '3M - Rehabilitation', '3M - Rheumatology', '3M - Transplant', '3M - Urologic Surg', and '3M - Urology'. On the right side of the 3M service lines list, there are two blue buttons with right and left arrows, and a vertical scrollbar. To the right of the 3M service lines list, there is a large empty box with a vertical scrollbar and two arrows (up and down) on the right side.

Note: Users are not able to edit the filters present in pre-defined groups. Instead, a new group will need to be manually created as a User Group, explained later in this section.

Pre-defined Group Search (PG)

To view the items present within a pre-defined group, select the group and move it to the filter selection box (on the right). Then, **double-click** the group name to open the group management window.

The screenshot displays a software interface for searching pre-defined groups. The top navigation bar includes tabs for 'Provider', 'CLINICAL CODES', 'PATIENT', 'A/D/T', and 'CHARGES/PAYOR'. The 'CLINICAL CODES' tab is active. Below the navigation bar, there is a search area with a dropdown menu set to 'PG' and a search box containing 'APR-DRG Cod'. To the right of the search box is a 'Manage your groups' button with a plus icon and a menu icon. A list of pre-defined groups is shown, with '3M - Cardiac Cath' selected and circled in red. A red circle also highlights a right arrow button next to the list. A callout window titled 'Group Name - 3M - Cardiac Cath' is open, showing a list of items: '1. 191 - (191) Cardiac Catheterization W Circ Disord Exc' and '2. 192 - (192) Cardiac Catheterization For Ischemic Heart'. The callout window has 'Print' and 'Close' buttons.

Note: Users are not able to edit the filters present in pre-defined groups. Instead, a new group will need to be manually created and upload as a User Group, explained later in this section.

Code/Desc Search (C)

The Code/Desc Search (C) setting will display all possible filter selections in that category.

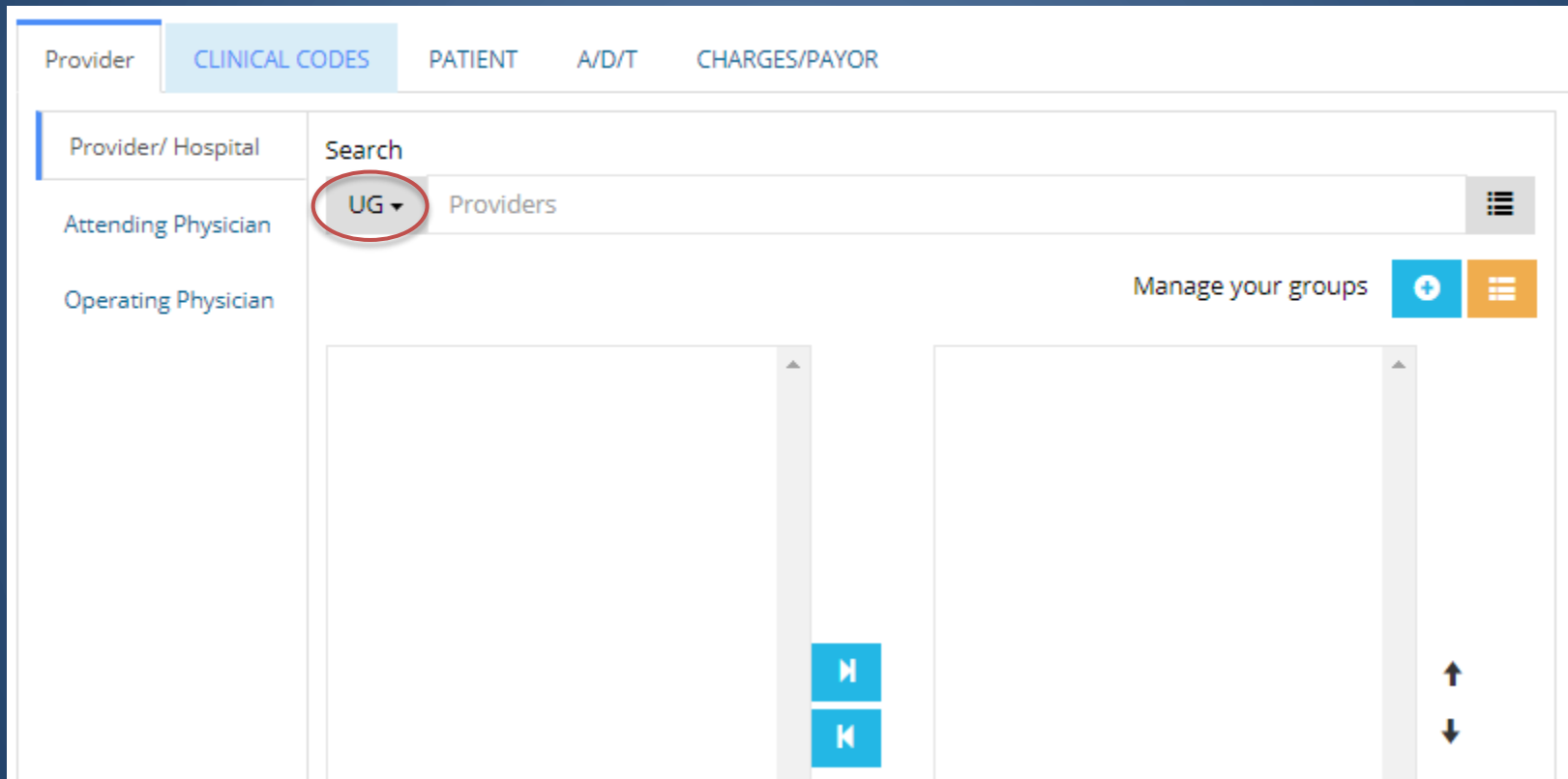
Use this search method for individual filter items, or select more than one by using the Ctrl or Shift keys.

The screenshot shows a software interface with a top navigation bar containing tabs for 'Provider', 'CLINICAL CODES', 'PATIENT', 'A/D/T', and 'CHARGES/PAYOR'. Below this is a search bar with a dropdown menu set to 'C' (Code/Desc Search) and a search input field containing 'APR-DRG Code'. To the right of the search bar is a 'Manage your groups' button with a blue plus sign icon. The main area is divided into two columns. The left column lists filter categories: 'Severity of Illness (SOI)', 'Risk of Mortality (ROM)', 'MS-DRG Code(s)', 'Principal Diag (DX1)', 'Principal Proc (PX1)', 'Primary Diag (DX1-5)', 'Primary Proc (PX1-5)', 'Secondary Diag (DX6-15)', 'Secondary Proc (PX6-15)', 'Select Diag Range', and 'Select Proc Range'. The right column displays a list of APR-DRG codes, with the first six items selected: '(001) Liver Transplant', '(002) Heart &/or Lung Transplant', '(003) Bone Marrow Transplant', '(004) Tracheostomy W Long Term Me', '(005) Tracheostomy W Long Term Me', and '(006) Pancreas Transplant'. A red arrow points from the 'Manage your groups' button to the list of selected codes.

The Code/Desc Search (C) setting can also be used as the selection process for creating a new group. By moving your selections over to the box on the right and clicking the blue + sign button by “Manage your groups,” you can save your current filter selections.

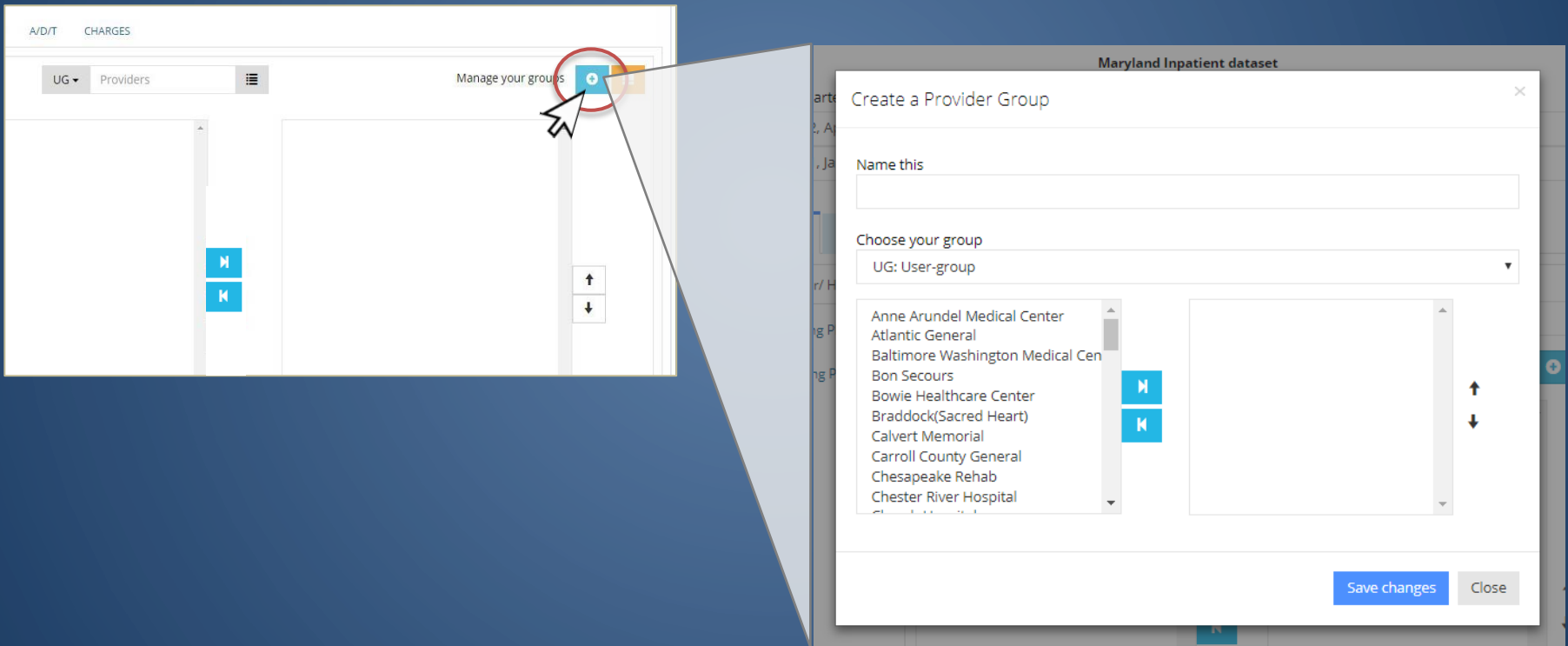
User Group Search (UG)

The User Group Search (UG) will bring up your previously created filter groups within your PCA Plus account. If you do not have any saved groups, the filter box will appear empty.



Creating User Groups

To create a new User Group, click on the blue plus sign button next to “Manage your groups” to open the group management window.



Creating User Groups

Selecting filter items for a new group is the same as selecting filters for a report.

Select desired filters by highlighting one or multiple items, and use the arrows to move them to the selection box on the right.

Maryland Inpatient dataset

Create a Provider Group

Name this
PCA Demo

Choose your group
UG: User-group

Anne Arundel Medical Center
Atlantic General
Baltimore Washington Medical Cen
Bon Secours
Bowie Healthcare Center
Braddock(Sacred Heart)
Calvert Memorial
Carroll County General
Chesapeake Rehab
Chester River Hospital

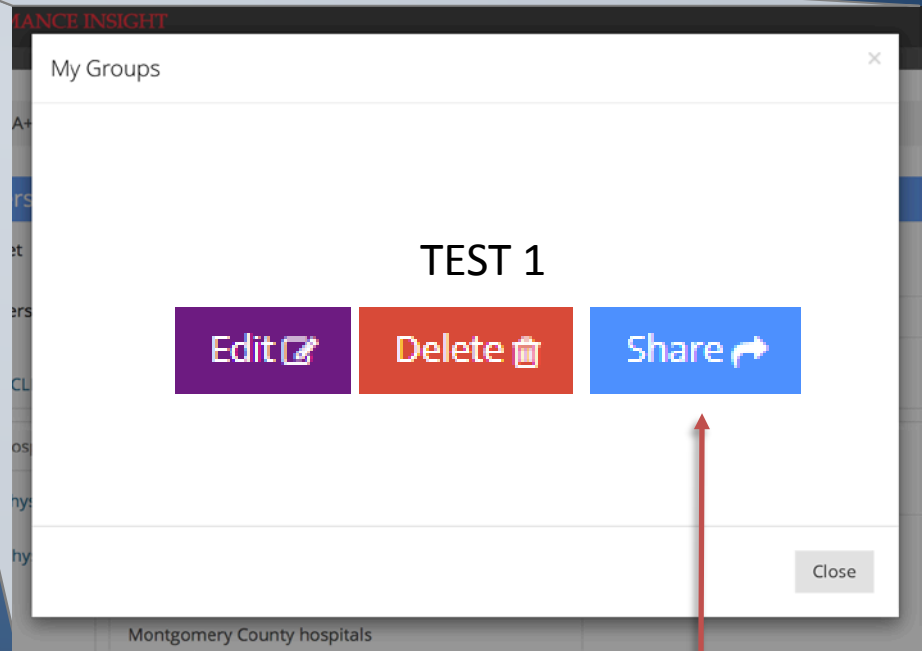
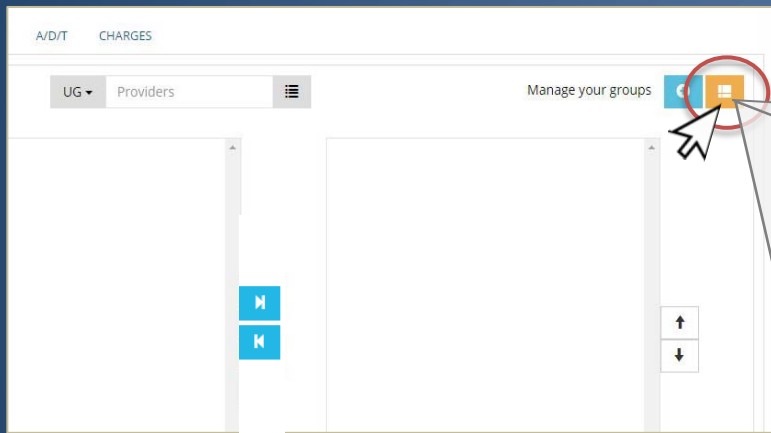
Anne Arundel Medical Center
Bon Secours
Carroll County General

Save changes Close

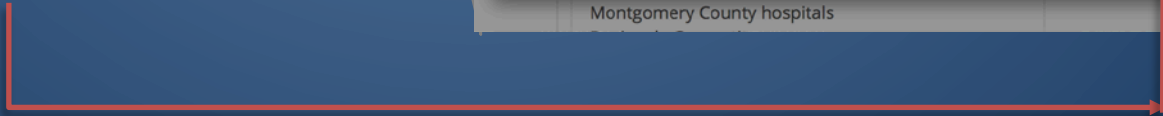
Enter the Group Name into the text box and click "Save Changes." The group will now appear in the User Group (UG) search for that category.

Editing or Deleting User Groups

To edit or delete a user group, click on the orange button next to “Manage your groups” to open the “My Groups” window.

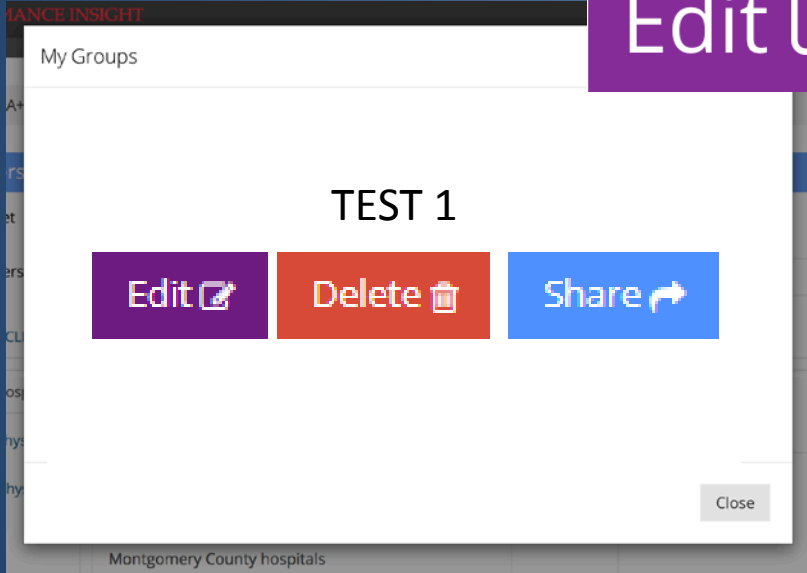


Use the “Share” feature to share your group with everyone in your organization.

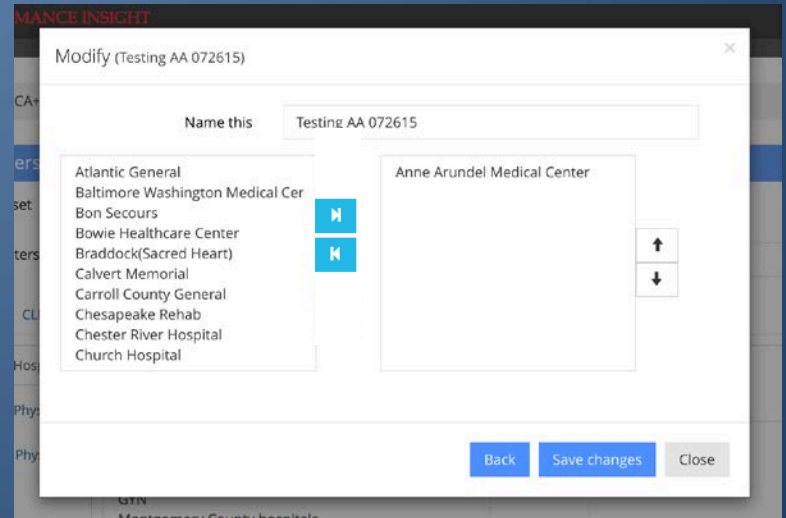


Editing User Groups

Click the purple Edit button next to the group you want to edit.



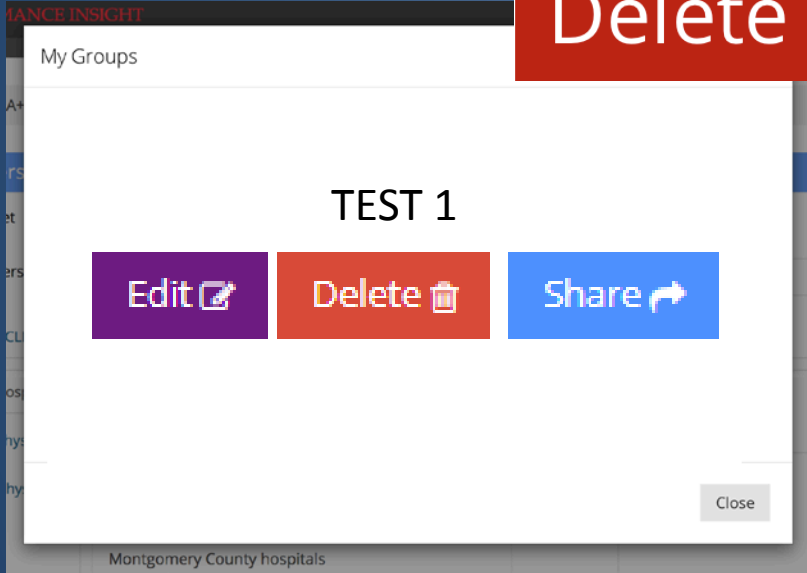
The group modification window will appear, allowing you to make changes to that saved group. Click "Save Changes" when finished.



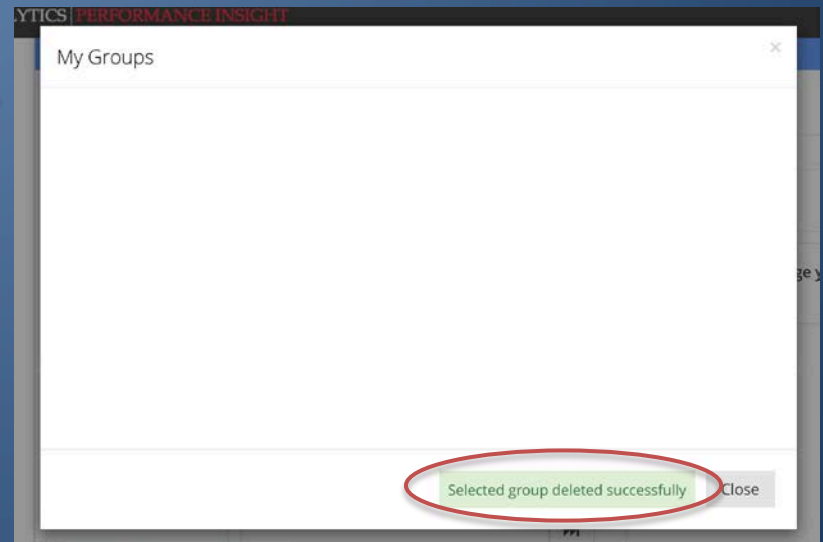
Deleting User Groups

Click the red Delete button next to the group you want to delete.

Delete 



The group will disappear, and a green box will appear at the bottom of the window if the delete was successful.



Uploading Groups

For more efficient grouping, use the “Upload Groups” feature on the left hand menu.

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Home > Upload Groups >

Filter*

Type* Pre Defined User Defined

Users Email*

Overwrite Existing Groups Overwrite

Upload File*

Inserted Successfully

Select the “Filter” under which you wish this group to appear.

“User Defined” will be automatically selected

Enter the first 3 letter of your email address

If updating an existing group, select the “Overwrite” button

- Once all selections are made, click the “Browse” button and upload your file.
- **Note:** your upload filename should be ‘provider_ug.csv’
- Upon successful uploads, a green message “**Inserted Successfully**” will appear.



NEW HEALTH ANALYTICS

Help & Support

For information regarding our products, PCA Plus software support, and customer service, please contact:

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