



**Centers for Medicare & Medicaid Services**  
**CMS Expedited Life Cycle (XLC)**

**CMS Abstraction and Reporting Tool (CART)**  
**Outpatient**  
**Release 1.12**

**User Guide**

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# 1. Introduction

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This User Guide provides the information necessary for hospitals to effectively use the CART – Outpatient tool.

CART is an application for the collection and analysis of quality improvement data. Through data collection, retrospective analyses, and real-time reporting, CART – Outpatient enables hospitals to comprehensively evaluate and manage quality improvement efforts. CART – Outpatient assists in meeting the aligned CMS and The Joint Commission measurement specifications for performance monitoring and data collection with a single application. It also maintains security of patient data to comply with the Health Information Portability and Accountability Act (HIPAA).

The application is available at no charge to hospitals or other organizations seeking to improve the quality of care for six hospital outpatient measure sets selected by CMS:

- Acute Myocardial Infarction (AMI)
- Chest Pain (CP)
- Emergency Department (ED) – Throughput
- Pain Management
- Stroke
- Surgery

CART – Outpatient has been designed to allow hospitals to abstract and edit medical record data, allowing for the answering of all questions or the use of skip pattern logic (in other words, skip some questions based on specified criteria). The tool provides the ability to import or export abstractions in uniform billing file layout information. CART – Outpatient reports are available within the tool to preview detailed abstraction information as well as detail and summary measure outcome information for both providers and physicians.

Once data collection is completed, hospitals are able to export their data from the tool and submit it to the Hospital Outpatient Quality Reporting (OQR) Clinical Warehouse via the QualityNet website. QualityNet Data Submission and Feedback/Comparison reports are available for registered QualityNet users via the QualityNet Home Page.

The QualityNet Help Desk is available for technical support and assistance with problems or questions that may arise regarding the CART – Outpatient software. Contact information for the QualityNet Help Desk is provided on the QualityNet website.

## 2. Overview

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CART – Outpatient is a free application that provides an option for abstractors to use skip pattern logic and provides measure analysis on completion. The tool provides the ability to import and export abstractions in uniform billing file layout information. CART – Outpatient reports are available within the tool to preview detailed abstraction information, as well as detail and summary measure outcome information for both providers and physicians.

Once data collection is completed, hospitals are able to export their data from the tool and submit it to the OQR Clinical Warehouse via the [QualityNet](http://www.qualitynet.org) website, <http://www.qualitynet.org>. QualityNet data submission and feedback/comparison reports are available for registered QualityNet users via the QualityNet Home Page.

The QualityNet Help Desk is available for technical support and assistance with problems or questions that may arise regarding the CART – Outpatient software. Contact information for the QualityNet Help Desk is provided on the QualityNet website. See Outpatient Q&A tool for reference to abstraction-related questions.

CART – Outpatient is available for use on a standalone, Windows-based computer or on a network. CART – Outpatient software provides the following functionality:

- Provider Setup/Maintenance
- User Setup/Maintenance
- Patient Setup/Maintenance
- Measure Set Selection and Preferences
- Abstraction
- Reporting
- Importing and Exporting

## 2.1 Conventions

This document provides screen prints and corresponding narrative to describe how to use CART – Outpatient.

Procedures are written in the action-result style. The step begins with the action the user must take followed by the result of that action. The step may also contain background information the user needs at the time the step is being performed.

Fields or buttons to be acted upon are indicated in **bold**; links to be acted upon are indicated as links in underlined blue text.

For example:

1. In Internet Explorer, from the Tools menu, choose **Internet Options**. The Internet Options window opens.
2. In the Internet Options window, click the **Advanced** tab. The Advanced tab with a list of settings appears.
3. In the Settings box, scroll down to the group of Security settings. Click to select **Enable native XMLHTTP support**, and then click **Ok**. The Internet Options window closes.

**Note:** Throughout this document, the term ‘user’ refers to a person who requires and/or has acquired access to CART.

## 2.2 Cautions & Warnings

Not applicable

## 3. Getting Started

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### 3.1 Set-Up Considerations

Initial installation of CART requires the installation and setup of Quality Management System (QMS) in addition to CART – Outpatient. Required installation files and instructions are located on the [QualityNet](#) website, under Data Collection (& CART)/CART Downloads & Info. Various versions of the CART – Outpatient tool are available, so care is needed in reviewing which version you require and if the installation is new to your workstation.

After you have completed installation of the tool and launched it, you will see the QMS load. Once the QMS application is loaded, the CART – Outpatient Login screen appears if CART – Outpatient is the only application installed. If CART – Inpatient and CART – Outpatient have been installed on this workstation, you will be prompted to select Inpatient or Outpatient. Specific details of this process may be found in the Starting the CART – Outpatient Application section below.

#### 3.1.1 System Configuration

CART – Outpatient has been designed to run on a standalone workstation or a network.

The QMS application is a unique proprietary design of a MySQL database. This design is not compatible with any other MySQL application.

### 3.1.2 Recommended Hardware and Software Requirements

- Workstation hardware supported (standalone and client/server)
  - Pentium 4 1.4 GHz Personal Computer (PC) configured with 512 MB of free RAM
  - 1 GB hard drive space available
  - Color monitor, display set at 1024 x 768 and minimum of 256 colors
- Workstation operating systems supported (standalone and client/server)
  - Windows XP with Service Pack 2
  - Windows 2003 with SP3 and all current security patches applied
  - Window 7 32-bit and 64-bit

## 3.2 User Access Considerations

After you have installed CART – Outpatient, the initial person signing into the application is required to setup at least one Provider and one System Administrator user. See Section 3.2.4, Initial Login, for instructions on the initial User ID and Password to be used.

### 3.2.1 The System Administrator User

System Administrators can:

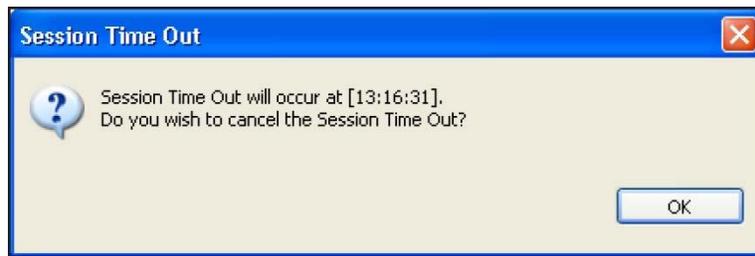
- Set up and maintain provider information
- Set up and maintain user accounts
- Specify measures and measure sets to be collected
- Modify the archive directory location, if necessary

Set up more than one System Administrator account as a back-up, in the event that one of the System Administrator accounts becomes locked.

Each CART application instance must always have at least one active System Administrator. If there is only one System Administrator and that person terminates his/her position, another System Administrator must be created before entering the Termination Date for the existing System Administrator.

### 3.2.2 Session Time-Out

After you have signed in to CART – Outpatient, the system continually monitors user activity (page refresh or new page request). If the system detects that there has been no user activity for greater than ten minutes, it will display a message that your session will end in five minutes (see Figure 1).

**Figure 1: Session Time-Out Message Box**

To continue your session, click **OK**. If you do not click **OK**, you will be returned to the Welcome screen and any data that was not saved will be lost.

(During the Import process, the system will *not* automatically time-out the session).

### 3.2.3 Password Rules

Changing your password is:

- Required upon initial log in to the application. See Section 3.2.4, Initial Login, for instructions on the User ID to be used on first login. The default password for any user is p@ssw0rd.
- Required when an account has been reset.
- Required every 60 days upon next log in

Voluntary at any time but cannot be changed more than once in a 24-hour period. This limitation on changing passwords does not apply to resetting an account.

The following are the rules for establishing an acceptable password:

- Use a minimum of eight characters and a maximum of nineteen.
- Use at least one upper case, one numeric, and one special character.
- Valid special characters are: % # \* + - , : = ? \_
- Passwords are case-sensitive.
- Do not use your User ID, First Name, or Last Name as your password.
- Do not use more than three consecutive like characters.
- Wait a minimum of six password changes to reuse a password.
- Do not change the password more than once in a 24-hour period.
- Passwords cannot contain dictionary words

### 3.2.4 Initial Login

The CART – Outpatient tool enables you to log in initially using *opps* as the user ID and using the default password as described in Section 3.2.3. (see Figure 2). The *opps* user ID has very limited access; it is established only for the user to set up the provider and system administrators. Once successfully signed in with the *opps* user ID, you will be prompted to change the password and answer security questions. You must then set up a provider and then a system administrator user. The system administrator is the highest-level user. You may not use the *opps* user ID user to create abstractions.

**Figure 2: CART – Outpatient Login Dialog Box**

When a new user is set up by the System Administrator, his/her initial password will be the default password as described in Section 3.2.3

To log in to CART – Outpatient for the first time after installation:

1. Enter *opps* in the **User ID** field. (case-sensitive)
2. Enter the default password (as in Section 3.2.3) in the **Password** field. (case-sensitive)
3. Click **Login**. A Change Password dialog box appears (see Figure 3).

**Figure 3: Change Password Dialog Box**

4. You are required to change your password before accessing the CART – Outpatient system. **Error! Reference source not found.** displays the pop-up message that appears regarding this action. If you click **Cancel**, your password will not be changed, and you will be logged off the system and redirected to the Welcome screen.

**Figure 4: System Logoff Warning**

5. Enter a new password in the **New Password** field and enter the same password in the **Confirm New Password** field.

If you need help with your password, hover over the light bulb to display the Content Assist Available and press **Ctrl + Space**. This will display the criteria for your new password. For a list of password rules, see Section 3.2.3, Password Rules.

Once the password is successfully changed, this will change the password for the CART – Outpatient opps user account.

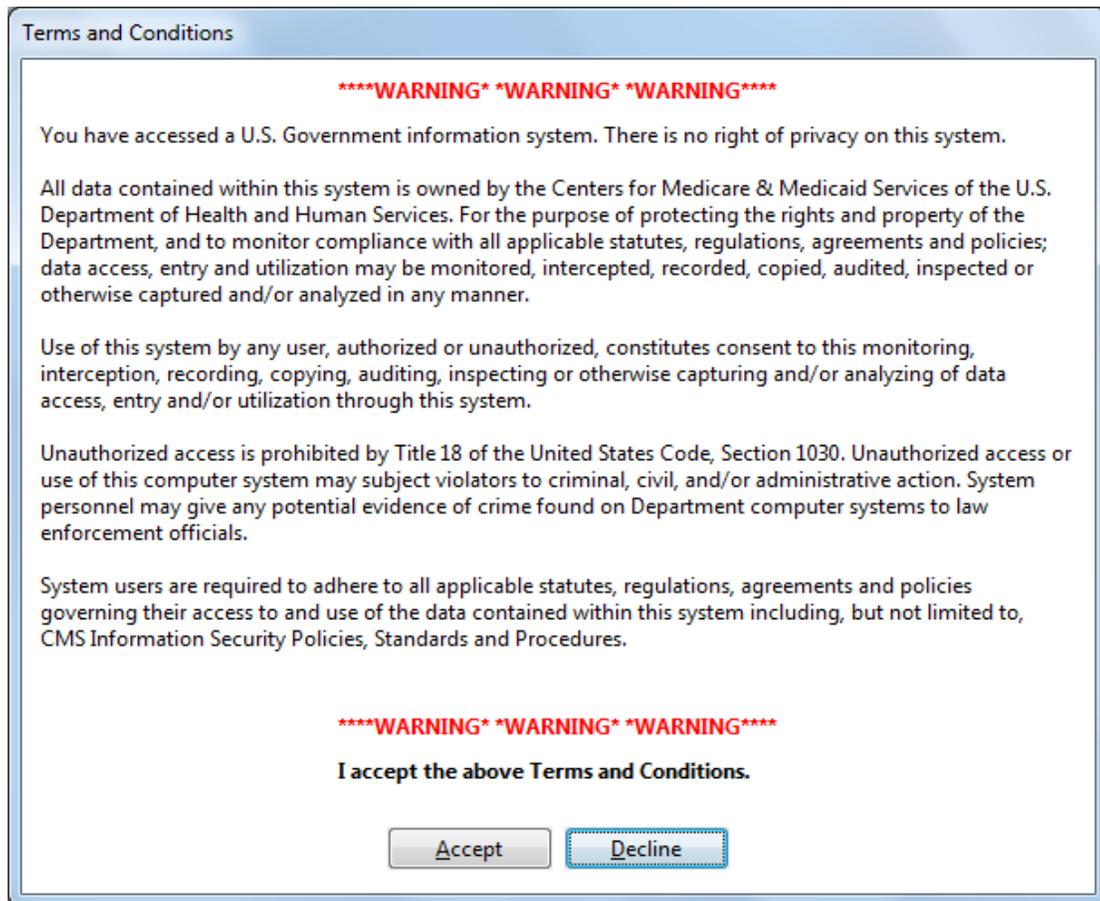
6. Click **Continue**. The Security Questions box displays. You are required to answer six of the ten Security Questions displayed. See Figure 5 for a list of the ten Security Questions.

**Figure 5: Security Questions**A dialog box titled "Security Questions" with a light blue header. Below the title is a red instruction: "To enable the OK button, a minimum of 6 answers is required." There are ten questions, each followed by a text input field:

- What city were you born in?
- What year did you graduate from high school?
- What is your favorite sport?
- What was the make of your first car?
- What was the color of your first car?
- What is your mother's maiden name?
- What was the name of your first pet?
- What size shoe do you wear?
- What is your favorite season of the year?
- What is your favorite movie?

At the bottom, there are "OK" and "Cancel" buttons.

7. To enable the **OK** button, press the **Tab** key after your last security question has been answered; click **OK**.
8. The Login Banner appears (see Figure 6). Click Accept. If the login banner is declined, the system will log the user off.

**Figure 6: Login Banner**

- When the user accepts the Login Banner, the CART – Outpatient screen appears (see Figure 7).

**Figure 7: The CART – Outpatient Screen**

- Set up the provider. Instructions follow for setting up the provider (see Section 3.2.5, Provider Setup).
- Set up the System Administrators per User Setup. Instructions follow for setting up the System Administrator and users (see Section 3.2.6, User Setup).

Set up more than one System Administrator account, so that you have back-up in the event that one of the System Administrator accounts becomes locked.

12. On the Security menu, click **Logout**.
13. Log back in as the System Administrator. Your initial password is the default password defined in Section 3.2.3. At log in, you will be prompted to change the password.

### 3.2.5 Provider Setup

The Provider Information screen shown in Figure 8 provides the ability to set up and modify providers. The term 'provider' refers to a hospital. The Provider Information screen is divided into two sections: **Provider Summary and Provider Detail**.

Figure 8: Provider Information Screen

The screenshot shows the 'CART - Outpatient' application window. The 'Provider Information' section is active, showing a 'Provider Summary' table and a 'Provider Detail' form. The 'Provider Summary' table has the following data:

Name	Address 1	City	State	Zip	CMS Cert No	Termination Date
john	6574 columbia gateway ...	columbia	MD	20876	123832	

The 'Provider Detail' form fields are as follows:

- Name\*: john
- Address 1: 6574 columbia gateway dr
- Address 2: (empty)
- Zip: 20876
- City: columbia
- State: MD
- CMS Cert No\*: 123832
- National Provider ID: (empty)
- Termination Date: --

The 'Provider Preferences' section includes:

- Time Period\*: 01/01/2013 - 06/30/2013 (1.9)
- Measure Set\*: A list of checkboxes for various measures, including:
  - QQR-AMI
  - OP-1 Median Time to Fibrinolysis (CMS)
  - OP-2 Fibrinolytic Therapy Received within 30 Minutes of ED Arrival (CMS)
  - OP-3a Median Time to Transfer to Another Facility for Acute Coronary
  - OP-3b Median Time to Transfer to Another Facility for Acute Coronary
  - OP-3c Median Time to Transfer to Another Facility for Acute Coronary
  - OP-4 Aspirin at Arrival (CMS)
  - OP-5 Median Time to ECG (CMS)
  - QQR-CP
  - OP-4 Aspirin at Arrival (CMS)
  - OP-5 Median Time to ECG (CMS)
  - QQR-ED THROUGHPUT
  - OP-18a Median Time from ED Arrival to ED Departure for Discharged I

The Provider Summary section displays provider data once it has been entered in the Provider Detail section. Data includes:

- Name
- Address 1 (Optional)
- Address 2 (Optional)
- Zip (Optional)
- City (Optional)
- State (Optional)
- CMS Cert No (CCN)
- National Provider ID (Optional)

- Termination Date (Enter data in this field only if the hospital is no longer valid, e.g., closed)

To add a provider:

1. On the Administration menu, click **Provider**. The Provider Information screen appears.
2. If no providers exist, enter data in the Provider Detail fields.

If providers exist, click **New Provider** (plus sign symbol) to enter new provider information.

3. Click **Save**. Saved information will display in the Provider Summary section.

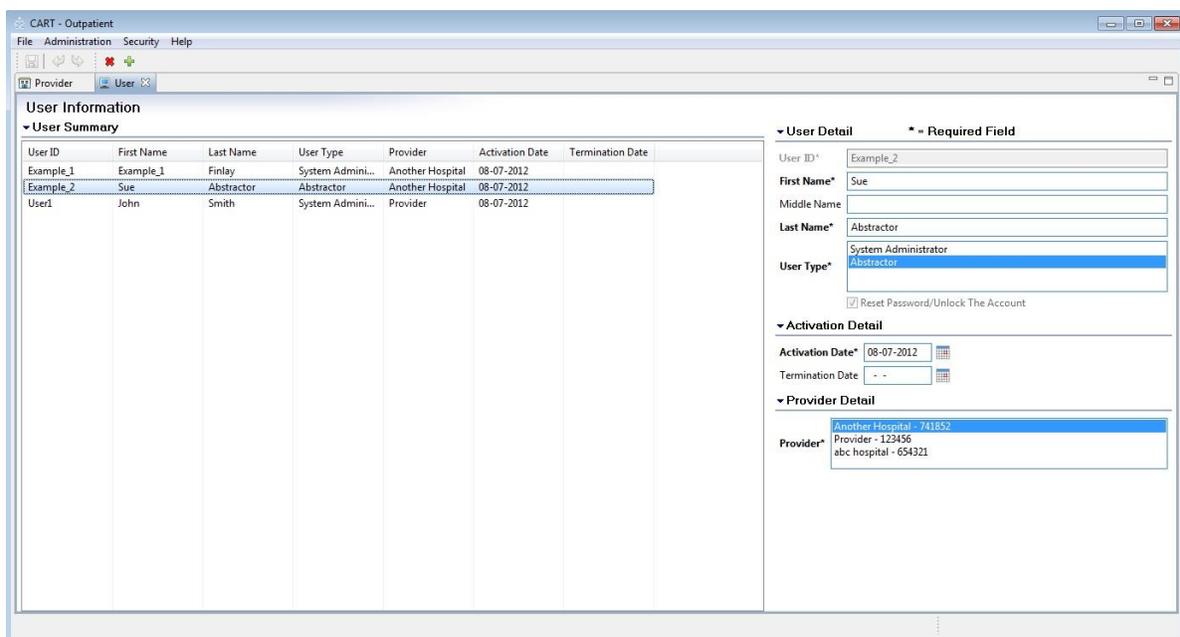
To modify a Provider:

1. In the Provider Summary section, select a provider. The data for that provider will display in the Provider Detail section.
2. Change any data in the Provider Detail section.
3. Click **Save**.

### 3.2.6 User Setup

The User Information screen shown in Figure 9 provides the ability to set up new users and modify users. The User Information screen is divided into four sections: **User Summary**, **User Detail**, **Activation Detail**, and **Provider Detail**, each of which can be expanded or collapsed as needed (see Section 3.4.2.5, Screen Size Control).

Figure 9: User Information Screen



### 3.2.6.1 User Summary

The User Summary section displays user data for existing users. Summary data includes:

- User ID
- First Name
- Last Name
- User Type (See Table 1 to determine what User Type to assign a user, based on application processes the User Type may perform)
- Provider
- Activation Date
- Termination Date (Enter data in this field only if the user is no longer valid, e.g., no longer works for the hospital)

### 3.2.6.2 User Detail

The User Detail section enables you to enter data for a new user and modify data for an existing user with the exception of the User ID. The User ID may not be modified once it has been created for the new user. Required fields are in bold type with an asterisk.

### 3.2.6.3 Activation Detail

The Activation Detail section enables you to enter activation and termination dates for the user. The Termination Date is optional and should not be completed until a known termination date exists for the user.

### 3.2.6.4 Provider Detail

The Provider Detail section enables you to select the provider to which the user is associated. Only one provider may be assigned to one user ID.

To add a user:

1. On the **Administration** menu, click **User**. The User Information Screen appears.
2. If no user exists, enter data in the **User Detail**, **Activation Detail**, and **Provider Detail** sections. If users exist, click **New User** to enter new user information.
3. Click **Save**. The new user information displays in the User Summary section. The system will automatically populate a checkmark in the **Reset Password** check box. This enables the new user to use their user ID as their initial user ID and the default as the password. (Refer to Section 3.2.3 for the default password).
4. If more users are needed, click **New** to add each new user. Be sure to click **Save** to save the user information.

To modify a user:

1. Select an existing user in the **User Summary** section of the User Information Screen (see Figure 10).

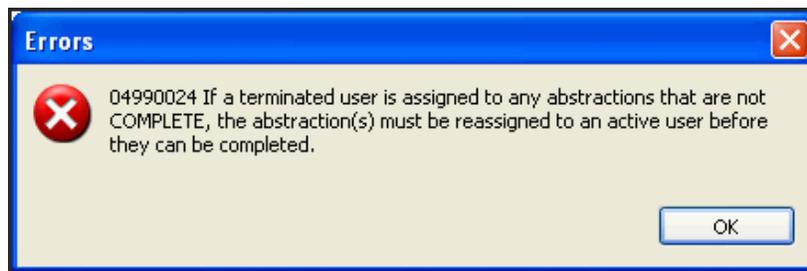
**Figure 10: User Summary Section of the User Information Screen**

User ID	First Name	Last Name	User Type	Provider	Activation Date
User1	User	One	Abstractor	Hospital 1	11-02-2012
User2	User	Two	Abstractor	Hospital 1	11-02-2012
User Admin	User	SA	System Administr...	Hospital 1	11-02-2012

2. Modify the data for that user in the **User Detail**, **Activation Detail**, and **Provider Detail** sections.
3. Click **Save**.

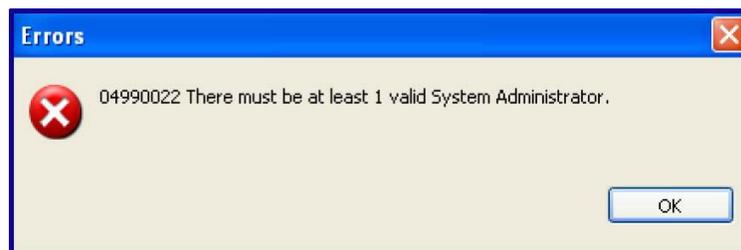
If you entered a termination date for a user with any pending abstractions, a termination date dialog box appears, advising you to reassign the pending abstractions to an active user. Click **OK** (see Figure 11).

**Figure 11: Termination Date Dialog Box**



Each instance of Outpatient CART must always have at least one active system administrator. If there is only one system administrator and that person terminates his/her position, another system administrator must be created prior to entering the termination date for the existing system administrator. Figure 12 shows the error message that appears if no system administrator is entered.

**Figure 12: Valid System Administrator Box**



### 3.2.7 Initial Login for System Administrator User

1. Enter your assigned **User ID** in the User ID field.
2. Enter the default password (defined in Section 3.2.3) in the password field.
3. Click **Login**. The Change Password screen is displayed.
4. Enter a new password in the **New Password** field and enter the same password in the **Confirm New Password** field.
5. Click **Continue**.
6. The Security Questions box is displayed. Enter answers to at least six of the ten Security Questions displayed.
7. To enable the OK button, press **Tab** after your last security question has been answered and then click **OK**.
8. The CART – Outpatient screen is displayed.

### 3.2.8 Set Preferences

Preferences define the measure sets and measures for which the provider data can be collected. At the individual abstraction level, the measures selected in the Provider Preferences section of the Provider Information screen will be selected. You can add measures at the individual abstraction level but cannot deselect any measures unless the preferences are changed.

Only the System Administrator can set up the Preferences (Time Period, Measure Sets, and Measures). Preferences can be changed at any time but will only affect future abstractions. At least one measure set with corresponding measures must be selected and saved for a time period in order to perform abstractions. Figure 13 displays the Provider Information Screen, showing Provider Preferences.

Figure 13: Provider Information Screen, with Provider Preferences Shown

The screenshot displays the 'Provider Information' screen in the CART - Outpatient application. The interface is divided into several sections:

- Provider Summary:** A table listing provider information. The first row shows: Name: john, Address 1: 6574 columbia gateway dr, City: columbia, State: MD, Zip: 20876, CMS Cert No: 123832, and Termination Date: (blank).
- Provider Detail:** A form with fields for Name (john), Address 1 (6574 columbia gateway dr), Address 2 (blank), Zip (20876), City (columbia), State (MD), CMS Cert No (123832), National Provider ID (blank), and Termination Date (blank).
- Provider Preferences:** A section for selecting a time period and measure sets. The 'Time Period' is set to '01/01/2013 - 06/30/2013 (1.9)'. Below this, there are instructions and a list of measure sets with checkboxes:
  - OQR-AMI
    - OP-1 Median Time to Fibrinolysis (CMS)
    - OP-2 Fibrinolytic Therapy Received within 30 Minutes of ED Arrival (CMS)
    - OP-3a Median Time to Transfer to Another Facility for Acute Coronary
    - OP-3b Median Time to Transfer to Another Facility for Acute Coronary
    - OP-3c Median Time to Transfer to Another Facility for Acute Coronary
    - OP-4 Aspirin at Arrival (CMS)
    - OP-5 Median Time to ECG (CMS)
  - OQR-CP
    - OP-4 Aspirin at Arrival (CMS)
    - OP-5 Median Time to ECG (CMS)
  - OQR-ED THROUGHPUT
    - OP-18a Median Time from ED Arrival to ED Departure for Discharged I -

To set preferences:

1. Select the desired provider in the Provider Summary section of the Provider Information screen. The Provider Preferences section is located in the lower-right corner of the Provider Information screen.
2. Select the desired time period from the **Time Period** list.
3. Click the **negative sign** button to collapse each measure set if desired.
4. Select the desired **Measure Set** checkboxes. All measures for that measure set will be selected.
5. Click **Save**.

By default, the system automatically populates a checkmark in the box next to each measure. To deselect a measure, click the box next to the measure name that will not be collected.

Measure sets and applicable measures are displayed in a tree format preceded by a green checkmark. You may need to use the scroll bars to view all of the measure sets and measures.

## 3.2.9 Managing Passwords

CART – Outpatient includes two features to assist in resetting your password:

- Forgot Password Feature
- System Administrator Reset Password/Unlock the Account

### 3.2.9.1 Forgot Password

CART – Outpatient has a Forgot Password feature to reset your password at login. Rules include:

- You will have only three attempts to successfully log in to the CART – Outpatient tool. Upon the third unsuccessful login attempt, your account will be locked. The system will display a notification message regarding the locked account and will instruct you to contact your CART – Outpatient System Administrator.
- You will be required to answer three Security Questions.
- When a System Administrator's account is locked, the CART – Outpatient database will automatically be archived.

To request a new password:

1. Enter your **User ID**.
2. Click **Forgot Password**. The Security Questions dialog box appears.
3. Enter your answers to the displayed Security Questions.
4. Press **Tab** after your last security question has been answered and then click **OK**. The Change Password box appears.
5. Enter a new password in the **New Password** field, and then enter the same password in the **Confirm New Password** field.
6. Click **Change Password**.

### 3.2.9.2 System Administrator Reset Password/Unlock the Account

The CART – Outpatient tool provides a visual indicator of a locked account. Any locked account will display in **bold** font in the User Summary section of the User Information screen. Only the System Administrator may use this function.

Figure 14: User Information Screen

The screenshot shows a web application window titled "User Information". It is divided into two main sections: "User Summary" and "User Detail".

**User Summary**

First Name	Last Name	User Type	Provider	Activation Date	Termination Date
Cindy	Admin_1	System Administr...	Hospital_1	09-30-2012	
Sandy	Admin_2	System Administr...	Hospital_1	11-02-2012	
<b>Sandy</b>	<b>Admin_3</b>	<b>System Admini...</b>	<b>Hospital_1</b>	<b>11-02-2012</b>	

**User Detail** \* = Required Field

User ID\* Admin\_3

First Name\* Sandy

Middle Name

Last Name\* Admin\_3

User Type\* System Administrator  
Abstractor

Reset Password/Unlock The Account

**Activation Detail**

Activation Date\* 11-02-2012

Termination Date - -

**Provider Detail**

Provider\* Hospital\_1 - 123456

To unlock a user's account:

1. Select the locked account (displayed in **bold**) within the User Summary (see Figure 14).
2. Select the **Reset Password/Unlock The Account** checkbox.
3. Click **Save**.
4. Instruct the user to enter the User ID in both the User ID and Password fields. The user will be prompted to change his/her password.

### 3.2.9.3 Changing Passwords

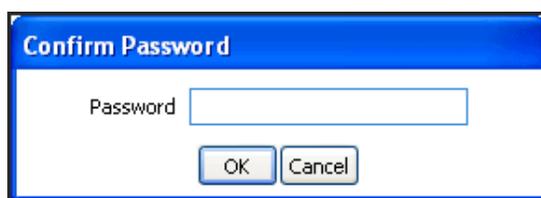
1. On the Security menu, click **Change Password**.
2. The Change Password box displays.
3. Enter your **Old Password**.
4. Enter a new password in the **New Password** and **Confirm New Password** fields.
5. Click **Change Password**.

### 3.2.10 Changing Security Questions

CART – Outpatient enables you to change your security questions at any time while signed into the tool.

To change your security questions/answers:

1. On the Security tab, click **Change Security Answers**.
2. A Confirm Password dialog box displays. Enter your CART – Outpatient User **Password** and click **OK** (see Figure 15).

**Figure 15: Confirm Password Dialog Box**

3. A Security box displays with your current security questions and answers. Change your Security Questions/Security Answers as desired and click **OK**.

At least six of the Security Questions **must** be answered in order to proceed.

### 3.2.11 User Types

Table 1 provides a summary of the different User Types and their associated roles within the CART – Outpatient tool. An 'X' = a process that a particular role performs unless otherwise specified.

**Table 1: Authorization Rights for User Types**

Process	System Administrator	Abstractor	Initial User (ops)
Maintain Provider Information	Add/Edit/Terminate	N/A	Add/Edit/Terminate
Maintain Preference Information	Add/Edit	N/A	N/A
Maintain User Information	Add/Edit/Terminate/ Unlock/ Reset Password	N/A	Add/Edit/ Terminate
Maintain Patient Information	Add/Edit/Delete	Add/Edit/ Delete	N/A
Maintain Abstractions	Add/Edit/Delete/Reassign	Add/Edit/ Delete	N/A
View/Print Reports	X	X	N/A
Import Files	X	N/A	N/A
Export Files	X	N/A	N/A
Change Archive File Location	X	N/A	N/A

Process	System Administrator	Abstractor	Initial User (ops)
Edit Abstraction Information	X	X	N/A
Integrate and Uninstall Modules	X	N/A	N/A
Enable/Disable Notifications	X	X	N/A

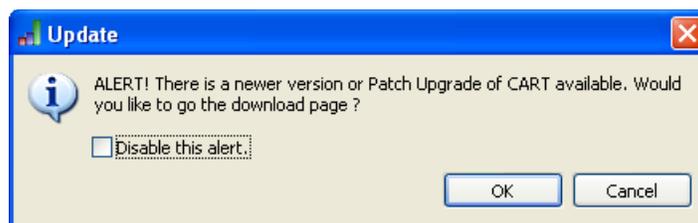
### 3.2.12 Help

Help is available for all questions at any time during abstraction by either clicking the **Help** icon to the right of the question or by selecting **Help Contents** from the **Help** menu. Adobe Reader is required to view the help screens. To close the help screens and return to the CART page, click **Close**.

### 3.2.13 Checking for System Upgrades

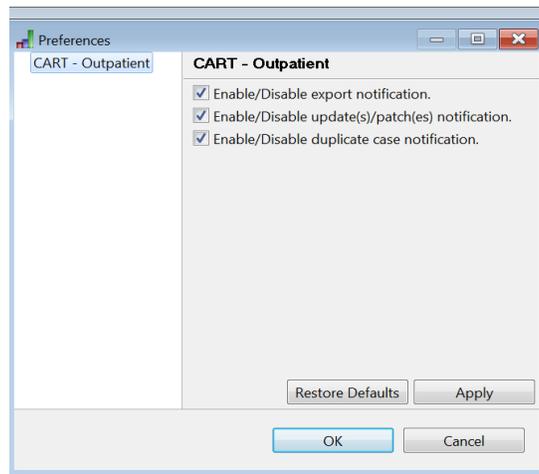
During the first week of every month, when the user launches the application, CART checks the QualityNet web site to see if the version of the system installed on the user's computer is the same as the latest version available on the web site. If it is not the same, the following message appears.

Figure 16: System Upgrade



To install the new version or patch, the user needs to access the QualityNet website <http://www.qualitynet.org>, under Data Collection (& CART)/CART Downloads & Info, read the Upgrade instructions, and install the upgrade. Both the instructions and the upgrade are located on the webpage in the **Upgrading from CART-Outpatient** box.

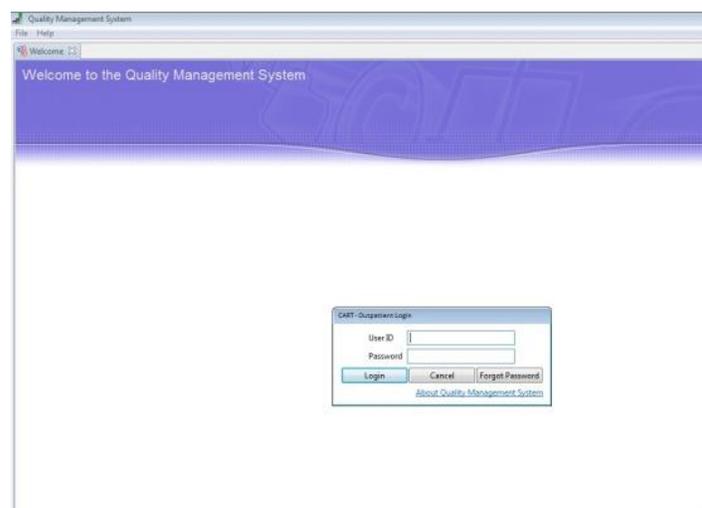
The user may choose to disable this alert in two ways. When the message first appears, the user may check the “Disable the alert” box and the message will not appear again unless the user chooses to enable it. The user may also remove or reinstate the alert using the Enable Notifications pop-up window under the File menu. To disable the alert, the user deselects the “Enable/Disable update(s)/patch(es) notification” box so that the check mark does not appear. To enable the alert after disabling it, the user selects the “Enable/Disable update(s)/patch(es) notification” box so that the check mark appears as in the following figure.

**Figure 17: Enable/Disable Update/Patch notification**

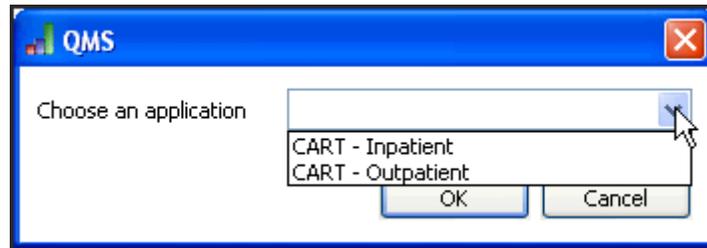
### 3.3 Accessing the System

To access the CART – Outpatient from MS Windows:

1. Launch QMS using one of the following methods:
  - a. Double click the **QMS30** desktop icon.
  - b. Click the application's entry on the Start menu.
  - c. Double click the qms30.exe in the CART – Outpatient/QMS30 directory.
2. The Welcome to the Quality Management System screen appears (see Figure 18).

**Figure 18: The Welcome to the Quality Management System Screen**

3. If multiple applications are installed, the QMS Application Selection box is displayed. Figure 19 shows the QMS Application Selection box and Figure 20 shows the Outpatient Login Screen.

**Figure 19: QMS Application Selection Box****Figure 20: CART – Outpatient Login Screen**

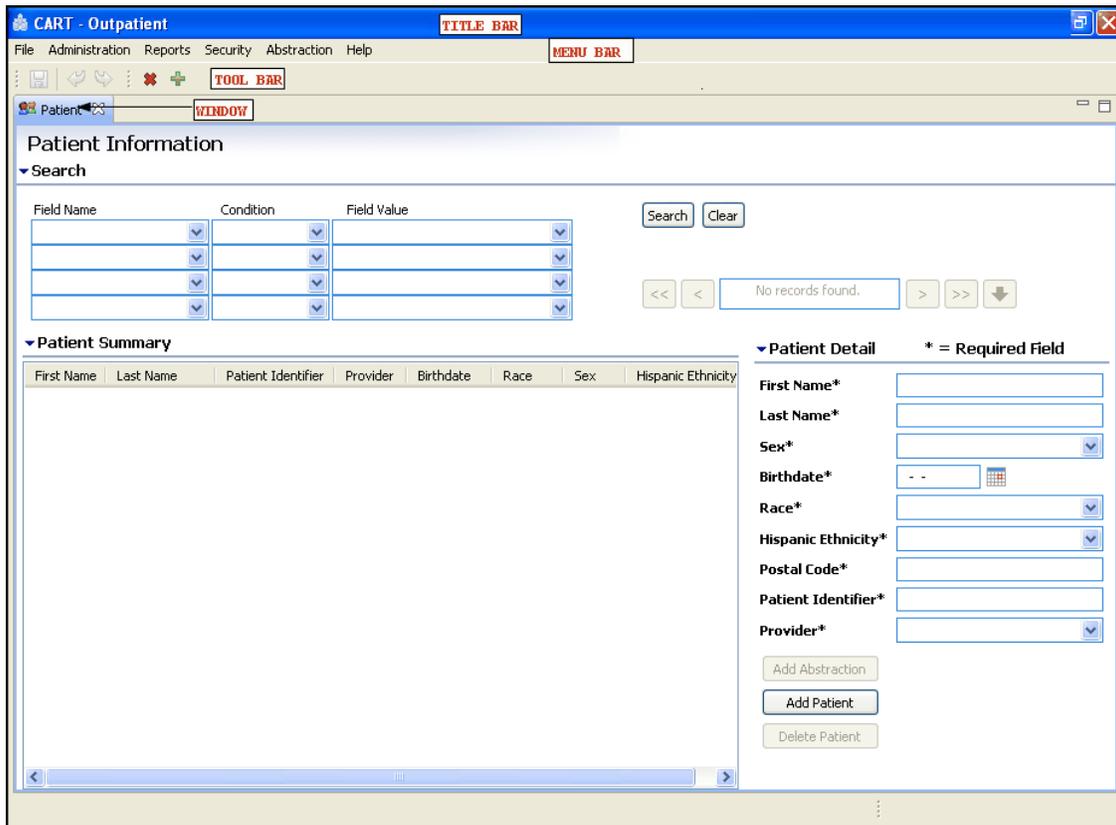
The **About Quality Management System** link in the lower-right corner of the CART – Outpatient login box provides information regarding the QMS and CART – Outpatient application version that is installed on the workstation.

### 3.4 System Organization & Navigation

#### 3.4.1 Screen Layout

CART – Outpatient contains familiar MS Windows features: title bar, menu bar, toolbar, and window size controls (see Figure 21).

Figure 21: CART – Outpatient Screen Layout



##### 3.4.1.1 Title Bar

The title bar displays the name of the software: CART – Outpatient.

### 3.4.1.2 Menu Bar

The Menu bar contains the following command selections:

- File
  - Save – Available on Provider, Patient, User, and Abstraction screens. Selecting Save will save the screen that is displayed.
  - Save All – Available when editing Abstraction, Patient, User, or Provider information. Selecting Save All will save the information on all tabs.
  - Undo – Enables you to undo an action when editing an abstraction.
  - Redo – Enables you to redo an action when editing an abstraction.
  - Close (Object) – Enables you to close the Abstraction, Abstraction Search, Provider, Patient, and User screens. The text of the command varies with the object being closed (i.e., Provider, Patient or User).
  - New (Object) – Available on the Provider, Patient, and User screens. It enables you to enter new providers, patients, and users. The text of the command varies with the object being closed (i.e., Provider, Patient or User).
  - Change Archive File Location – Enables the System Administrator to assign a specific file location to archive the CART – Outpatient backup files.
  - Enable Notifications – Enables Notification alerts to the User.
  - Exit – Enables you to exit the CART – Outpatient application and closes QMS Core.
- Administration
  - Provider – Only available to the System Administrator. Displays the Provider Information screen.
  - Patient – Available to System Administrator and Abstractor user. Displays the Patient Information screen.
  - User – Only available to the System Administrator. Displays the User Information screen.
- Reports
  - Measure Detail by Physician – Displays the overall measure outcome for all cases with a status of complete for the specified physician.
  - Abstraction Detail – Provides a complete list of all questions and answers for an abstraction.
  - Case Listing by Unique ID – Provides a list of patients that were abstracted during a requested timeframe.

- Measure Failure – Displays all cases with a status of complete that failed a measure during a requested timeframe.
- Measure Summary – Provides an aggregate count of category assignments for each measure by provider.
- Measure Trending – Displays the total number of abstractions that pass or fail over a selected time period.
- Measure Trending – Continuous Variable – Displays the median of all measure values for each month contained in the Encounter Date Range.
- Measures – Provides an overall total number of complete abstractions for a facility for a selected topic including a breakdown of the age, sex, and measure rates.
- Security
  - Change Security Answers – Enables you to change your security questions and answers after submitting your password.
  - Change Password – Enables you to change your password.
  - Logout – Logs you out of the application without closing CART – Outpatient.
- Abstraction
  - Import Zip – Enables System Administrator to import zip files containing Extensible Markup Language (XML) files.
  - Import Comma Separated Values (CSV) – Enables System Administrator to import CSV files.
  - Import XML – Enables System Administrator to import XML files.
  - Search – Enables you to search for existing abstractions.
- Help
  - Search – Enables you to search the help topics for a specific word or words.
  - Help Contents – Enables you to access all help topics.
  - About Quality Management System – Provides information regarding QMS and the CART – Outpatient version installed on your workstation.

### 3.4.1.3 Toolbar

Each screen contains various toolbars that contain buttons and icons to assist the user. As you mouse over icons, the name of the functionality is displayed. The availability of the functionality will vary depending upon which screen is displayed.



The Patient screen enables the user to set up new patients and modify patients. From this screen, you can start/create an abstraction. Both a System Administrator and an abstractor can delete patients and the abstractions associated with the patient from this screen.

The Abstraction Search screen enables all user types to search for abstractions, edit abstraction information, delete abstractions, and export abstractions.

The Abstraction screen enables all user types to enter data for the abstraction, view measure calculation on cases with the status of complete, and enter comments. The tab name includes the patient's name and encounter date and time.

Right-click in the screen space of Provider, Patient, User, or Abstraction Search and choose one of the close options or the New Editor option.

New Editor opens up a new screen for the current screen you are engaged in. For example, if you are on the Abstraction Search screen and choose New Editor, a new Abstraction Search screen will appear.

### 3.4.2.1 Sorting

The Provider, User, Patient, and Abstraction Search screens provide the ability to sort displayed search results by the header row. To toggle between ascending and descending order of the field, click on the field name and an arrow will appear next to the field name. To reverse the sort, click on the field name again (see Figure 23).

**Figure 23: Header Row of Search Results List**



### 3.4.2.2 Combo Box Elements

A combo box is an element with a drop-down list of answers. In the following figure, **State** is an example of a combo box. To enter data, type or select a word in **State** (see Figure 24).

**Figure 24: Combo Box**

<b>State*</b>	IA	
<b>CMS Cert No*</b>	<input type="text"/>	
National Provider ID	<input type="text"/>	
Termination Date	--	

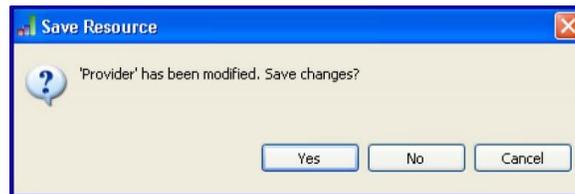
### 3.4.2.3 Save Data

When changes are made to data displayed on a screen, an asterisk displays to the left of the screen tab title. To save those changes, click **Save**. The changes will be saved and the asterisk will no longer appear.

### 3.4.2.4 Closing a Screen

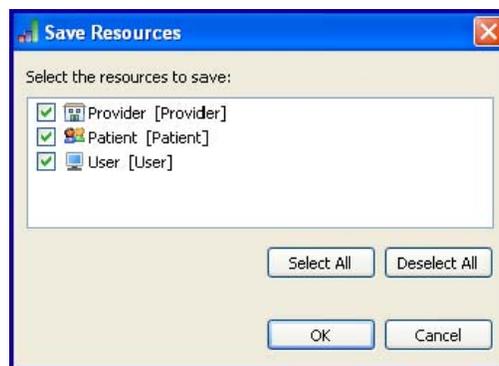
To close a screen, click **Close** on the screen tab or the **Close** button on the toolbar. When you close a screen with unsaved changes, a Save Resource dialog box appears, asking if you want to save the changes (see Figure 25).

Figure 25: Save Resource Box



If you attempt to exit CART – Outpatient and more than one screen is open with changes that have not been saved, a Save Resources box appears. Select the resources you want to save and click **OK** to save changes (see Figure 26).

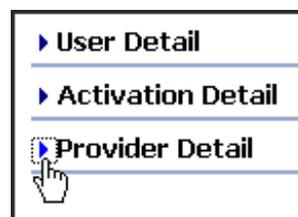
Figure 26: Select Resources to Save Box



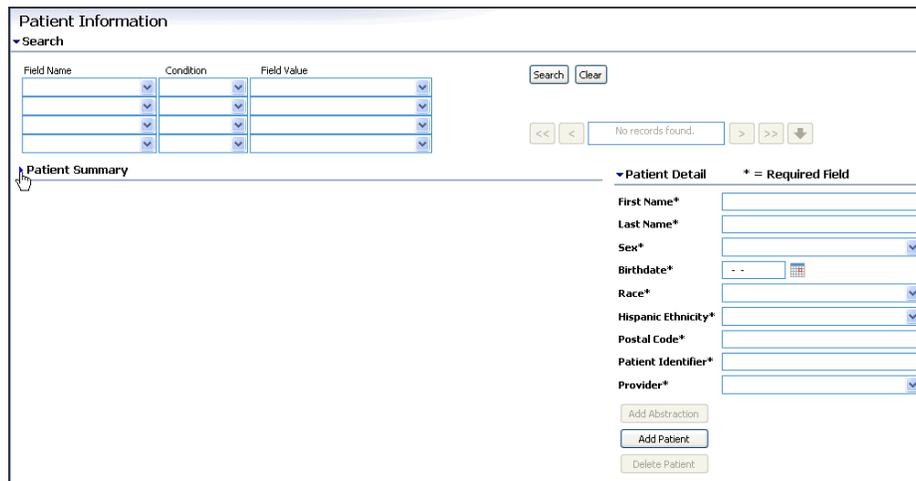
### 3.4.2.5 Screen Size Control

The Provider, Patient, and User Information screens are divided into various sections such as Search, Summary, and Detail. Each section can be collapsed by use of the arrow to the left of the section title. Clicking on the arrow a second time will reinstate the section. Figure 27 shows a sample of the size controls and Figure 28 shows a sample Patient Information screen with the Patient Summary section collapsed.

Figure 27: Screen Size Control

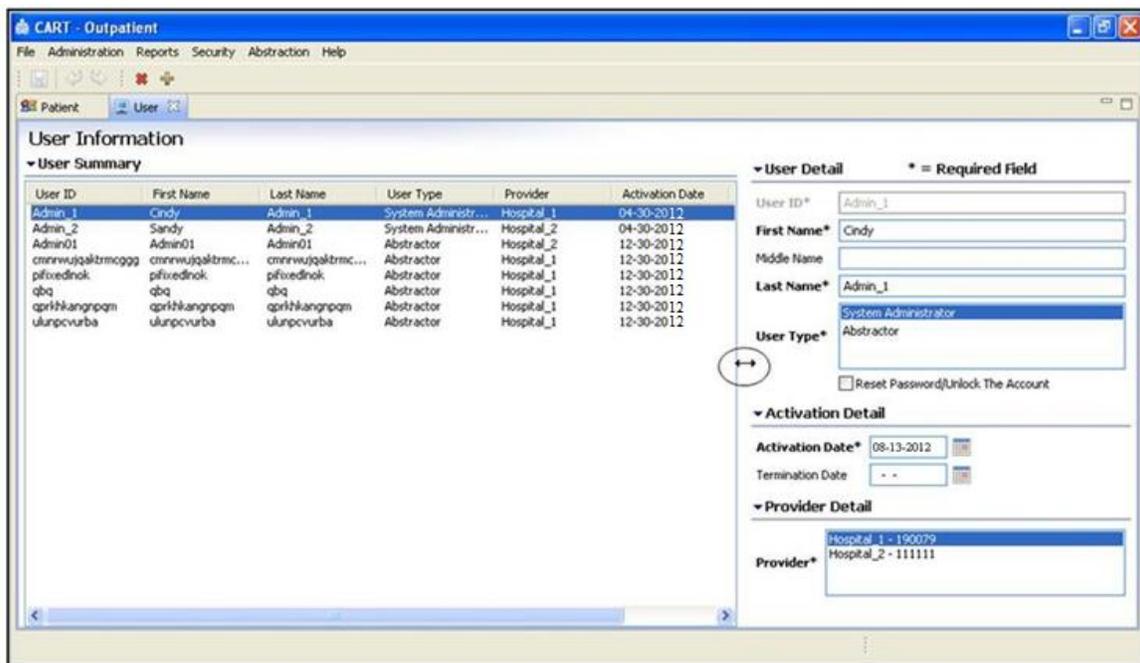


**Figure 28: Patient Information Screen with Patient Summary Section Collapsed**



The sections may also be resized if needed. Place your cursor over the line that separates the Summary section from the Detail section. The cursor will create an arrow. Click and drag the line to either the right or left depending on which area you want to expand (see Figure 29).

**Figure 29: User Information Screen with a Resizing Arrow**



### 3.5 Exiting the System

To log out of CART – Outpatient: From the Security menu, click **Logout**. The Welcome to the Quality Management System screen is displayed.

To exit the Quality Management System: From the File menu, click **Exit**. The CART – Outpatient application and the Quality Management System both close.

## 4. Using the System

The following subsections provide detailed, step-by-step instructions on how to use the various functions or features of CART – Outpatient.

### 4.1 Patient Information

The Patient Information Screen enables you to add new patients, modify patient data, delete patients, and search for patients (see Figure 30).

**Figure 30: The Patient Information Screen**

#### 4.1.1 Patient Summary

The Patient Summary section displays patient information for existing patients. Summary data includes:

- First Name
- Last Name
- Patient Identifier
- Postal Code
- Provider
- Birthdate
- Race

- Sex
- Hispanic Ethnicity

### 4.1.2 Patient Detail

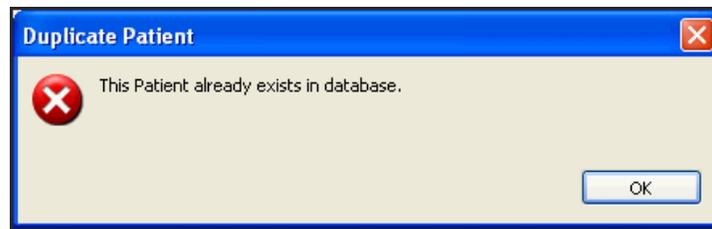
The Patient Detail section enables you to enter data for a new patient and modify data for an existing patient. Required fields are in bold type with an asterisk.

To add a new patient:

1. On the Administration menu, click **Patient**.
2. The Patient Information screen is displayed.
3. Click **New Patient** to display blank Patient Detail fields.
4. Enter data in the **Patient Detail** section.
5. Click **Save**. The patient information displays in the Patient Summary section. The option to add an abstraction or delete the patient is enabled.

CART – Outpatient will identify a duplicate patient when the following criteria match exactly to an existing patient's record: **Birthdate**, **Race**, **Hispanic Ethnicity**, **Patient Identifier**, and **Provider**. Figure 31 displays the message that appears when a duplicate patient is identified.

Figure 31: Duplicate Patient Error Message Dialog Box



### 4.1.3 Patient Search

The search feature enables you to search for a specific patient record or all patient records. Patients matching your search criteria will display in the Patient Summary section. If no search criteria are entered, the system will display all patients.

To perform a patient search:

1. On the Administration menu, click **Patient**. The Patient Information screen displays.
2. To retrieve **all** existing patient records, click **Search**.
3. To retrieve **one or more records** based on search criteria:
  - Select criteria from the **Field Name** and **Condition** lists.
  - Enter a **Field Value**.

- Click **Search**.
- You may search based on up to four selections at one time.
- To revise your Field Value, click **Clear** and enter a new value.
- Patients who match all of the search criteria will display in the Patient Summary section.

#### 4.1.4 Modify Patient

To modify a patient:

1. Select a patient in the Patient Summary section. The information for that patient will display in the Patient Detail section.
2. Modify the necessary Patient Detail data.
3. Click **Save**. If you change the provider, you will be asked to confirm the change. All associated abstractions for the patient will display. Click **Finish** to verify the provider change or **Cancel** to cancel the provider change.

#### 4.1.5 Delete Patient

To delete a patient:

1. Select the desired patient in the Patient Summary section.
2. Click **Delete Patient**.

If an abstraction exists for the patient, a Confirm Delete Patient(s) box displays, asking you to verify that you want to delete the patient and all associated abstractions. Click **Finish** to delete the patient and all associated abstractions or click **Cancel** to cancel the patient deletion (see Figure 32).

Figure 32: Confirm Delete Patient(s) Box



## 4.2 Abstractions

The abstraction process may begin after the patient has been entered into the database from the Patient Information screen or from an imported file. The initial data necessary to begin an abstraction includes case information. Once you choose the **Add Abstraction** option, a new screen will appear for the user to enter the following case information:

- Encounter Date
- Arrival Time
- Measure Set
- Abstractor ID
- Abstraction Date
- Comment (Optional)

If all of the measures for a measure set are not selected for the time period, the option is made available to view the current measures and add measures if desired.

Once you have entered or selected a patient and chosen the **Add Abstraction** or **Edit Abstraction** option, an Abstraction tab will appear. It displays the Patient Name, Encounter Date, Arrival Time, and the option to close the abstraction.

The task of creating an abstraction is primarily accomplished by answering questions on the abstraction screen in the Question Editor section of the Abstraction tab. Only the questions applicable to the measure set and measures selected are displayed.

Help is available for all questions at any time during abstraction by either clicking the **Help** icon to the right of the question or by selecting **Help Contents** from the **Help** menu.

### 4.2.1 Create a New Abstraction

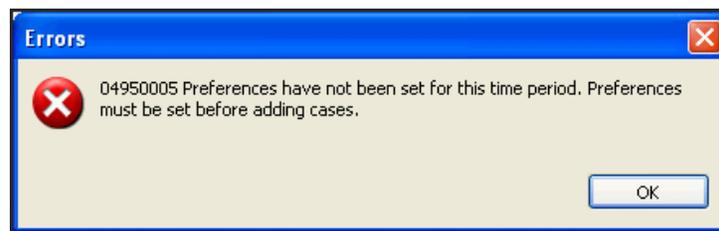
1. Select the desired patient in the Patient Summary section. (If the patient does not exist yet, enter the new patient data and save it first.)
2. Click **Add Abstraction**.
3. The Add/Edit Abstraction for patient screen appears (see Figure 33).

**Figure 33: The Add/Edit Abstraction Screen**

4. Enter data in the fields, then click **Finish**. The Abstraction screen appears.

#### 4.2.1.1 Preferences Missing

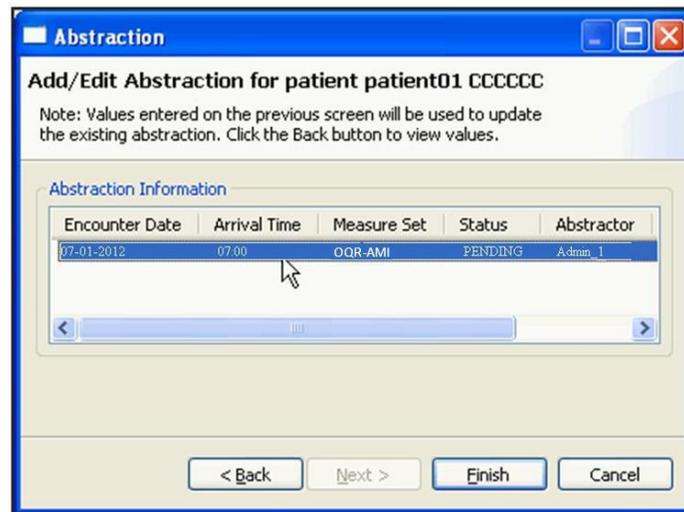
If preferences have not been set up for the time period, the **Next** button will be enabled. Click **Next** and a warning message appears. Click **OK** to close the message. Click **Cancel** to close the Add/Edit Abstraction screen. A System Administrator is required to set up preferences before you may retry. Figure 34 displays the warning message that appears when preferences have not been set for a given time period.

**Figure 34: Preferences Warning Box**

#### 4.2.1.2 Existing Abstractions

If the patient has an existing abstraction with the same Encounter Date and Arrival Time, the **Next** button will be enabled. Click **Next**. The Add/Edit Abstraction Screen appears. If the patient has an existing abstraction with the same encounter date, arrival time, and measure set, the **Next** button will be enabled. Click **Next**. A list of abstractions for the patient will be displayed. Figure 35 displays an example of abstraction information for a patient.

Figure 35: Existing Abstraction Information for a Patient



Missing Measures Information for the existing patient abstraction will be displayed. Select the abstraction to be completed and click **Finish**. The Abstraction screen appears.

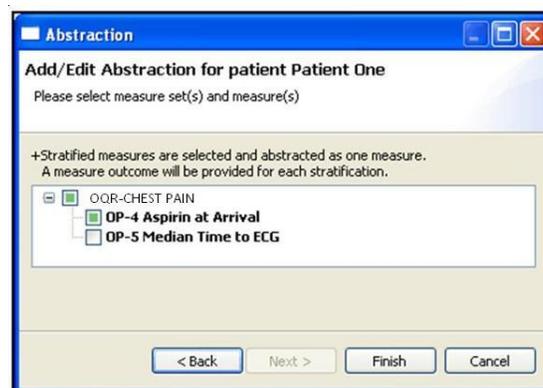
#### 4.2.1.3 Missing Measures

If all of the measures for the measure set are not selected for the time period, the **Next** button will be enabled. Click **Next**.

To add measures:

1. From the Add/Edit Abstraction for patient...Abstraction screen, click the displayed abstraction. The **Next** button will be enabled.
2. Click **Next**. The list of measure sets and measures will be displayed. Figure 36 displays a sample measure sets dialog box.

Figure 36: Measure Sets Dialog Box



3. Add additional measures, if desired, and click **Finish**.

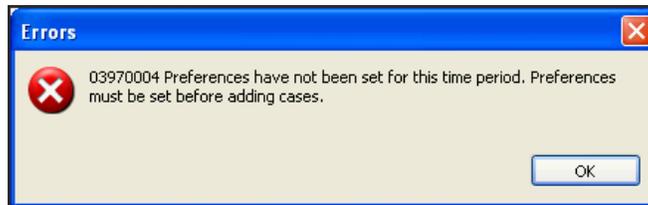
The measures previously set as preferences by the System Administrator will display with a green checkbox and cannot be de-selected. However, you can add additional

measures if applicable. If additional measures are selected, they will display with a green checkmark.

#### 4.2.1.4 Missing Preferences

If preferences have not been set up for the time period (see Section 3.2.8, Set Preferences), the **Next** button will be enabled. Click **Next**; a warning message will be displayed (see Figure 37).

Figure 37: Preferences Warning Box



Click **OK** to close the message and return to the Abstraction screen. Click **Cancel** to close the Abstraction screen. Contact a System Administrator to have preferences set up before you retry creating the abstraction.

#### 4.2.1.5 Abstraction Screen

Once a patient is entered in the CART – Outpatient tool, you may begin the abstraction process. You also have the option of importing patient and abstraction data (which will be discussed later in this guide) and modifying the information once imported. Once you begin the abstraction, you will not be able to access other screens until you have exited the abstraction.

The Abstraction screen is divided into two vertical sections, with the Question Editor section divided into two subsections:

- Navigator (left pane)
- Question Editor (right pane)
  - Abstraction
  - Patient Details

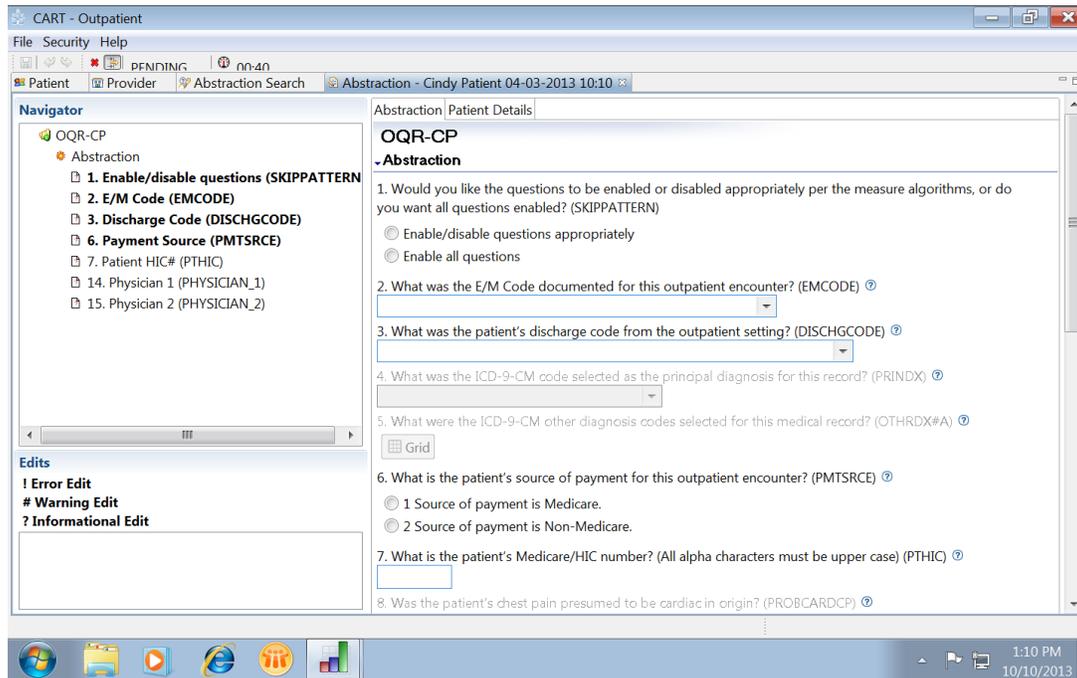
Figure 38 displays a sample Abstraction screen and Figure 39 displays a sample Navigator screen. A description of the Navigator and Question Editor screens follows later in this chapter.

The **Abstraction Toolbar** provides the following:

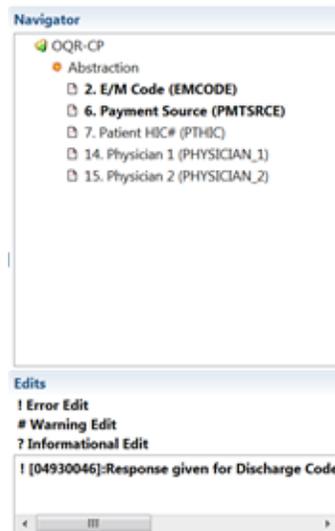
- Save
- Undo or Redo changes
- Close Abstraction
- Show/Hide Answered Questions
- Current status of the case (e.g., “PENDING”)

- Timer of the abstraction process (may be paused and restarted)

**Figure 38: Abstraction Screen**



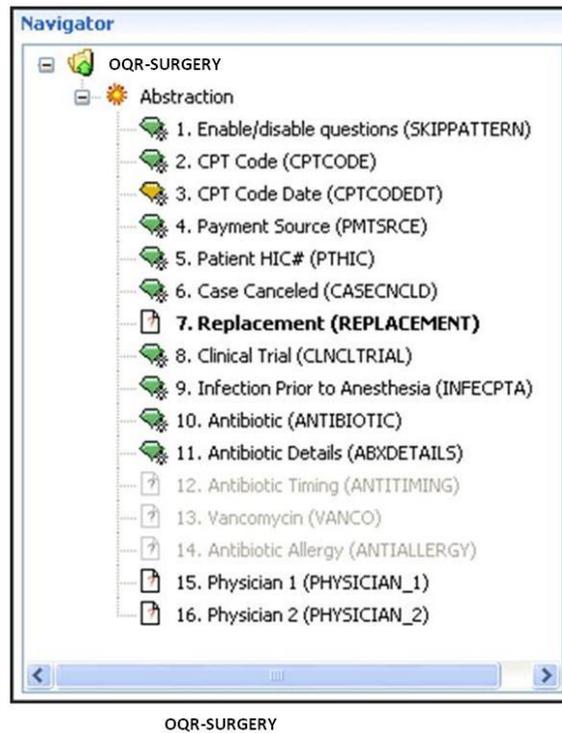
**Figure 39: Navigator Screen**



#### 4.2.1.6 Navigator Pane

The Navigator section enables you to move between questions anywhere in the abstraction. The Navigator section is formatted as a Windows tree directory. The first level contains the measure set, the second level contains the category (e.g., Abstraction), and the third level contains the questions that are applicable to the measure set (see Figure 40).

**Figure 40: Navigator Pane of the Abstraction Screen**



- Required questions are in **bold** font.
- Optional questions are in regular font.
- Disabled questions are grayed out.
- Use the plus or minus buttons to expand or collapse the tree.
- Unanswered questions (including questions that are disabled due to skip patterns) display an unanswered symbol to the left of the question.
- Click a question in the Navigator section (left-side) to be taken directly to that question within the Question Editor section (right-side).
- As questions are answered in the Question Editor section, if the **Show Answered Questions** option is selected, the Navigator section will indicate the following question status to the left of the question:
  - Complete
  - Complete but Pending Edit

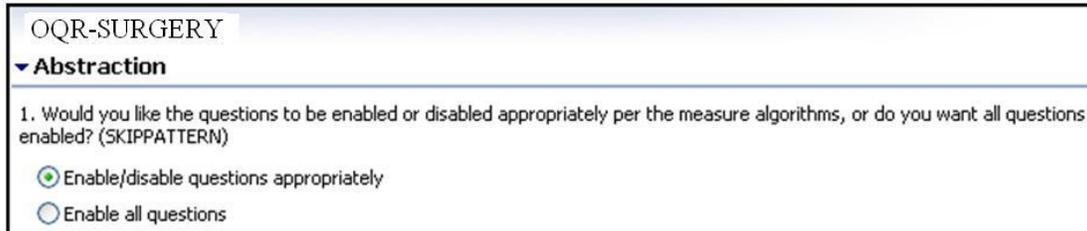
#### 4.2.1.7 Question Editor Pane

The Question Editor screen is divided into two tabs:

- The Abstraction screen displays abstraction questions based on your measure preferences and skip pattern selection. The first question within the abstraction

determines your skip pattern selection. You may select **Enable/disable questions appropriately** and follow all skip patterns. Or you may select **Enable all questions** and answer all related questions for that measure set. Figure 41 displays a sample Abstraction section.

**Figure 41: Skip Patterns Determination Question**



OQR-SURGERY

▼ **Abstraction**

1. Would you like the questions to be enabled or disabled appropriately per the measure algorithms, or do you want all questions enabled? (SKIPATTERN)

Enable/disable questions appropriately

Enable all questions

- The Patient Details screen displays Patient Details and Measures. (Refer to Figure 49)
  - Patient Details – displays read-only patient information.
  - The Comment field is the only section that is not read-only.
  - Measures – displays a list of the applicable quality measures and the measure category assignment. For continuous variable measures, the tool will display the measurement value (in minutes) along with the measure category assignment when applicable. Initially, the Status column is blank. The measure outcomes will calculate once the abstraction status is complete.

## 4.2.2 Abstraction Status

The Abstraction toolbar keeps you informed of the status of your abstraction. There are three abstraction statuses:

- **Complete** – An abstraction achieves **Complete** status when all required questions are answered and have passed all edits.
- **Pending** – An abstraction will remain in a **Pending** status until all required questions have been answered.
- **Edit Errors** – An abstraction will be labeled with an **Edit Errors** status if the abstraction answers have triggered a *hard edit*.

## 4.2.3 Edit Types

- Edit errors usually occur on import, but can also occur while entering a new abstraction or editing an existing abstraction. If the abstraction being imported contains at least one hard edit, the import is still allowed and saved with a status of Edit\_Errors. The user can then edit the abstraction and correct the errors. Edits are displayed in the lower-left corner of the abstraction screen.
- **! Error Edit** – Critical edits require changes to an abstraction in order for it to be saved as complete and be accepted into the OQR Clinical Warehouse. This edit is also known as a *Hard* edit and is indicated with an exclamation symbol.
- **# Warning Edit** – Warning edits allow the entered value to remain, but ask for a confirmation as to the accuracy of the answer provided. If you ignore the Warning edit message and save, the abstraction status will display as Edit\_Errors rather than complete. This edit is also known as a *Hard* edit and is indicated with a pound symbol.
- **? Informational Edit** – Informational edits do not require changes to an abstraction in order for it to be saved as complete and be accepted into the OQR Clinical Warehouse. This edit is also known as a *Soft* edit and is indicated with a question mark symbol.

## 4.2.4 Measure Status and Category Assignments

Measure category assignments are calculated measure outcomes for each record that is completed. When the patient abstraction is completed, it is evaluated against the measures' requirements. The measure requirements are published in the *Specifications Manual for Hospital Outpatient Department Quality Measures* at <http://www.qualitynet.org>. Table 2 includes descriptions of the measure category assignments.

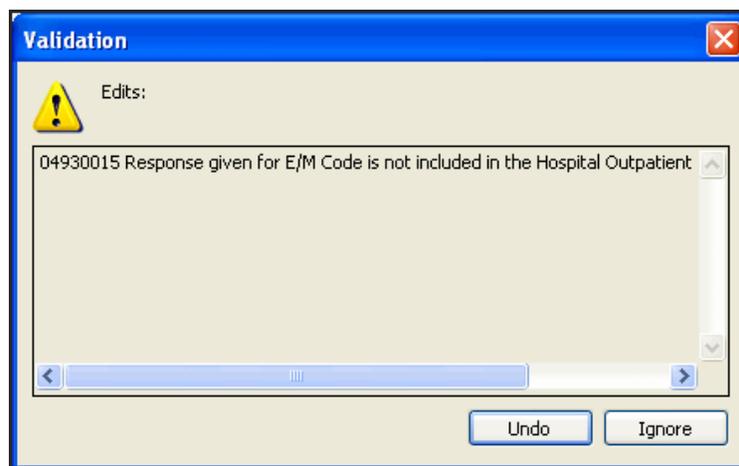
**Table 2: Measure Category Assignments**

Measure Category	Description
Category D	<p>In Measure Population (used for reporting)</p> <p>For rate-based measures: Record is a member of the measure's population and there has not been an occurrence of the measure.</p> <p>For continuous variable measures: Record is a member of the measure's population and has sufficient accurate and valid data to compute the measurement. <b>(Example: OP-1, OP-3b, and OP-5: 60(D))</b></p>
Category D#	<p>In Measure Population (used to identify stratified populations of specific measures)</p> <p>For rate-based measures: Record is a member of the measure's population and there has not been an occurrence of the measure. For continuous variable measures: Record is a member of the measure's population and has sufficient accurate and valid data to compute the measurement. <b>(Example for OP-3a: 60 (D1)) (Example for OP-3c: 60 (D2))</b></p>
Category E	<p>In Numerator Population</p> <p>For rate-based measures: Record is a member of the measure's population and there has been an occurrence of the measure.</p> <p>For continuous variable measures: Does not apply.</p>
Category X	<p>Data Is Missing</p> <p>For rate-based and continuous variable measures: Data is missing that is required to calculate the measure. The record will be rejected when transmitted.</p>
Category Y	<p>UTD Allowable Value Does Not Allow Calculation of the Measure</p> <p>For rate-based measures: Does not apply.</p> <p>For continuous variable measures: Record contains a Date, Time, or Numeric data element with a value of 'UTD.'</p>

## 4.2.5 Abstraction Tips

- For optimization of the skip patterns for each measure set, it is suggested that you abstract in the order the questions appear on the screen.
- Skip patterns are driven by the answers to previous questions.
- Abstraction status doesn't change from pending to complete until abstraction is saved.
- If **Enable/disable questions appropriately** is selected, the skip patterns will be used.
- If **Enable all questions** is selected, all questions will be required in order for the abstraction to go to a complete status.
- You will also notice edits as you work through the abstraction. Edits are checks that CART – Outpatient is conducting behind the scenes on the answers you provide to the questions.
- Edits are driven by the answers to previous questions. By clicking **Undo**, the answer will be cleared (see Figure 42).

Figure 42: Validation Edits Dialog Box



- An abstraction will achieve complete status when all required, enabled questions are answered and the edit errors have been corrected.
- To view the status of the measures once the abstraction is complete, click **Patient Details** (see Figure 43).

**Figure 43: Patient Details Tab of the Abstraction Screen Editor Pane**

Measure	Status
OP-1 Median Time to Fibrinolysis (CMS)	20 (D)
OP-2 Fibrinolytic Therapy Received within 30 Minute...	Passed - (E)
OP-3a Median Time to Transfer to Another Facility fo...	Denominator Exclusion - (B)
OP-3b Median Time to Transfer to Another Facility fo...	Denominator Exclusion - (B)
OP-3c Median Time to Transfer to Another Facility fo...	Denominator Exclusion - (B)
OP-4 Aspirin at Arrival (CMS)	Passed - (E)
OP-5 Median Time to ECG (CMS)	10 (D)

#### 4.2.6 Save Abstraction

Click **Save**, or, on the **File** menu, click **Save** or **Save All**.

The **Save All** command on the **File** menu will save the information entered on all open tabs including the information on the tab that is currently displayed.

When a user clicks **Save** to exit an abstraction and the abstraction is being modified concurrently by another user, a Concurrent Modification message appears, advising you to close the abstraction without saving any of the changes and then re-open the abstraction.

#### 4.2.7 Close Abstraction

Click **Close** on the Abstraction screen tab or **Close** on the toolbar.

#### 4.2.8 Abstraction Search

The search feature enables you to search for all abstractions or specific abstractions within the CART – Outpatient tool. To search for all abstractions, click **Search** without entering any criteria (see Figure 44).

Figure 44: Abstraction Search Screen

**Abstractions**

**Search Criteria**

Field Name	Condition	Field Value

Search Clear

<< < (1 - 2) of 2 > >>

First Name	Last Name	Patient Identifier	Encounter Date	Arrival Time	Measure Set	Abstraction Status	Provider	Abstractor ID	Abstraction Date	Export Date
Cindy	Patient	patient3	04-03-2013	10:10	OQR-CP	PENDING	Test_Hos...	Itrs	10-10-2013	
Other	Patient	patient2	06-20-2013	05:15	OQR-AMI	COMPLETE	Test_Hos...	Itrs	10-10-2013	

Edit Abstraction Information Edit Abstraction Duplicate Case Export Delete Abstraction

Selected 1 items

2:57 PM 10/10/2013

To search for specific abstractions, you must select one or more of the following in the **Field Name** list:

- First Name
- Last Name
- Patient Identifier
- Encounter Date
- Arrival Time
- Measure Set
- Abstraction Date
- Abstraction Status
- Provider
- Abstractor ID
- Export Date

Once a Field Name is selected, you have the option to choose from the condition list. The condition list values vary on the Field Name selected.

Patient records matching your search criteria will display once you complete a search. You may then Edit Abstraction Information (case information), Edit Abstraction, Delete Abstraction, Duplicate Case, and Export abstractions.

If the user has the role type of Administrator and the 'Abstractor ID' search criteria is selected as the Field Name value, the system will display all abstractions for all users who are affiliated with the provider that the Administrator is associated with.

A user with the role type of abstractor has the ability to search/view abstractions that contain his/her Abstractor ID and the provider he/she is affiliated with.

To perform an abstraction search:

1. On the Abstraction menu, click **Search**. The Abstraction Search screen displays.
2. To retrieve **all** existing abstraction records, click **Search**.
3. To retrieve **one or more records** based on search criteria:
  - Select criteria from the **Field Name** and **Condition** list.
  - Enter a **Field Value**.
  - Click **Search**.

Dates must be entered in mm-dd-yyyy format.

You may search based on up to four selections at one time.

If you have made an error in your selections and want to start over, click **Clear**.

4. Abstractions that match all of the search criteria will be displayed.

A Navigation toolbar assists you with moving from page to page or lets you return all rows on one screen.

## 4.2.9 Edit Abstraction

Once an abstraction has been entered into CART – Outpatient and saved, you may continue editing the abstraction. Any abstraction may be edited.

To edit an abstraction:

1. On the **Abstraction** menu, click **Search**. The Abstraction Search screen appears.
2. Click **Search**.
3. Select the desired abstraction.
4. Click **Edit Abstraction**. The Abstraction screen appears.

To add/edit Abstraction Case Information:

1. On the **Abstraction** menu, click **Search**. The Abstraction Search screen appears.
2. Click **Search**.
3. Select the desired abstraction.
4. Click **Edit Abstraction Information**. The Add/Edit Abstraction screen appears (see Figure 45).

**Figure 45: Add/Edit Abstraction Screen**

If all of the measures for the measure set are selected, the measure set selection cannot be modified when Add/Edit Abstraction is opened from the Abstraction Search screen. Only the **Finish** and **Cancel** buttons are available.

If all of the measures for the measure set are not selected for the time period, the next button will enable. Click **Next** to view the measures.

If you do not make any changes to the Case Information screen and **Cancel**, you will return to the Abstraction Search screen.

5. Make any applicable changes and click **Finish**.
6. The Abstraction screen appears.

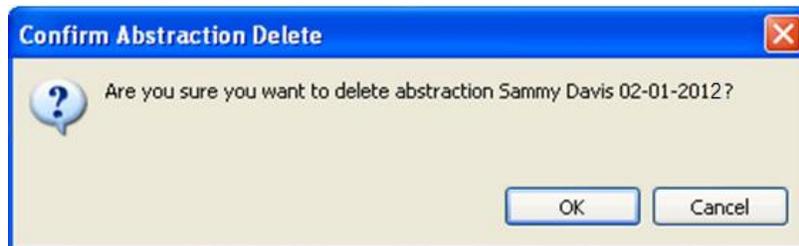
#### 4.2.10 Delete Abstraction

Once an abstraction has been entered into CART – Outpatient and saved, you can delete the abstraction. System Administrator and Abstructor user types may delete abstractions. Multiple abstractions may be selected for deletion by pressing the **Ctrl** or **Shift** keys when making selections.

To delete an abstraction:

1. On the **Abstraction** menu, click **Search**. The Abstraction Search screen appears.
2. Click **Search**.
3. Select the desired abstraction.
4. Click **Delete Abstraction**. The Abstraction screen appears (see Figure 46).

**Figure 46: Confirm Abstraction Delete**



5. Click **OK**.

#### 4.2.11 Reassigning Abstractions (System Administrator only)

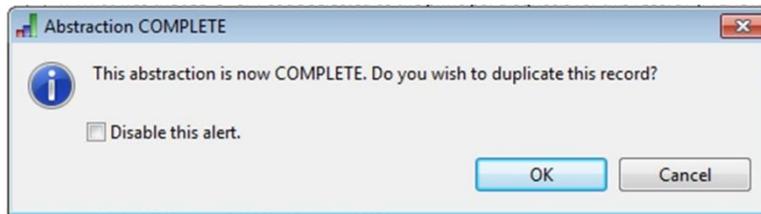
CART – Outpatient lets you assign an abstraction to a new abstractor. Reassignment may be necessary when a terminated user has pending abstractions. Once the user’s termination date has passed, the case cannot be completed until that user’s abstractions are reassigned to an active user.

To reassign an abstraction:

1. On the **Abstraction** menu, click **Search**. The Abstraction Search screen appears.
2. Click **Search**.
3. Select a new Abstractor ID from the list and click **Finish**. The abstraction will open.
4. Close the opened abstraction.

#### 4.2.12 Create a Duplicate Abstraction

CART – Outpatient lets you create a duplicate abstraction from an existing abstraction by copying an existing abstraction into a different measure set. Once you complete a case, a pop-up will come up stating, “This abstraction is now COMPLETE. Do you wish to duplicate this record?” To copy the case, click **OK** and proceed to step 3 below.

**Figure 47: Abstraction Complete Screen**

To create a duplicate abstraction for an existing abstraction:

1. Select the desired abstraction in the Abstraction Search section.
2. Click **Duplicate Case**.
3. The Abstraction screen appears (see Figure 48):

**Figure 48: The Duplicate Abstraction Screen**

4. This will copy the case level information except measure set, abstractor ID, abstraction date, and comments. If all of the measures for the chosen measure set are not selected for the time period, the **Next** button will enable. Click **Next**. The Add/Edit Abstraction for patient Abstraction screen is displayed. Review the measures, selecting and deselecting them as needed. For details, see Section 4.2.1.3, Missing Measures.
5. If preferences have not been set up for the time period, the **Next** button will be enabled. Click **Next** then skip to Section 4.2.1.4, Missing Preferences. For information on setting preferences, see Section 3.2.8.

6. If the patient has an existing abstraction with the same Admission Date, the **Next** button will be enabled. Click **Next** and then skip to Section 4.2.1.2, Existing Abstractions.
7. Click **Finish**. The Abstraction screen appears (see Figure 49).

**Figure 49: The Abstraction Screen**

The screenshot shows the 'Abstraction - Cindy Patient 04-03-2013 10:10' window. The left sidebar contains a 'Navigator' with a tree view under 'OQR-CP' including 'Abstraction' and steps 1 through 15. Below the navigator is an 'Edits' section with 'Error Edit', 'Warning Edit', and 'Informational Edit' options. The main content area is titled 'Abstraction Patient Details' and contains a list of 8 questions for data entry:

1. Would you like the questions to be enabled or disabled appropriately per the measure algorithms, or do you want all questions enabled? (SKIPPATTERN)
  - Enable/disable questions appropriately
  - Enable all questions
2. What was the E/M Code documented for this outpatient encounter? (EMCODE) [Dropdown menu]
3. What was the patient's discharge code from the outpatient setting? (DISCHGCODE) [Dropdown menu]
4. What was the ICD-9-CM code selected as the principal diagnosis for this record? (PRINDX) [Dropdown menu]
5. What were the ICD-9-CM other diagnosis codes selected for this medical record? (OTHRDX#A) [Grid button]
6. What is the patient's source of payment for this outpatient encounter? (PMTSRCE)
  - 1 Source of payment is Medicare.
  - 2 Source of payment is Non-Medicare.
7. What is the patient's Medicare/HIC number? (All alpha characters must be upper case) (PTHIC) [Text input field]
8. Was the patient's chest pain presumed to be cardiac in origin? (PROBCARDCP) [Text input field]

## 4.3 Reports

CART – Outpatient reports enable you to preview and print detailed abstraction information, as well as detail and summary measure outcome information for both providers and physicians.

The following reports are available:

- Abstraction Detail
- Case Listing By Unique ID
- Measure Detail by Physician
- Measure Failure
- Measure Summary
- Measure Trending
- Measure Trending – Continuous Variable
- Measures

### 4.3.1 Running Reports

Reports generated within the CART – Outpatient tool may be saved or exported as a Portable Document Format (PDF), single sheet XLS, or as a CSV file. Please note that Help Desk support will be provided only for PDF files. The reports screen also enables you to resize the displayed report on the screen (see Figure 50).

**Figure 50: The Report Viewer Toolbar**



To run a report:

1. Click **Reports** on the Menu bar.
2. Select a specific report. A parameter screen appears.
3. Complete the required information and click **OK**.
4. The Report Viewer screen appears with the report results.

To print the report:

1. Click **Print**.
2. Click **OK** to close the print screen.

To save a report:

1. Click **Save**.
2. Select a location to save your file and click **Save**.

To export a report:

1. Click **Save/Export**. The available export values display.
2. Select an export type.
3. Select a location to save your report and click **Save**.

#### 4.3.1.1 Abstraction Detail Report

The Abstraction Detail Report lists the questions, answers, comments, and abstractor name for an abstraction. This report is based on abstractions with a status of Complete, Pending, or Edit\_Errors. Questions are dynamic and display in the report in the order they display in CART – Outpatient. Only those questions that were answered in the abstraction are included. The report is sorted by Encounter Date, then by Arrival Time, in ascending order. If no data is available for the selected parameters, the report will display only header information with the retrieval criteria entered by the user. Figure 51 displays a sample report.

**Figure 51: Abstraction Detail Report**

<b>Report Run Date:</b> 01-22-2013		<b>Abstraction Detail – Hospital OQR</b>				<b>Page:</b> 1 of 1			
		<b>Provider:</b> John - 123832							
		<b>Encounter Date Range:</b> 01-21-2013 - 01-22-2013							
		<b>Measure Set:</b> OQR-AMI							
		<b>Patient Identifier:</b> 011							
First Name	Last Name	Encounter Date	Arrival Time	Status	Sex	Race	Birthdate	Hispanic Ethnicity	Postal Code
John	Smith	01-21-2013	UTD	COMPLETE	Male	White	01-15-1974	No	20854
Abstractor: puddles fighting									
Abstraction									
Enable/disable questions		Enable/disable questions appropriately							
EM Code		99281							
Discharge Code		4a Acute Care Facility- General Inpatient Care							
ICD-9-CM Principal Diagnosis Code		410.00							
Payment Source		2 Source of payment is Non-Medicare.							
Initial ECG Interpretation		No							
Aspirin Received		Yes							
ECG		Yes							
ECG Date		01-22-2013							
ECG Time		UTD							
Physician 1		PHYSICIAN1							
Physician 2		PHYSICIAN2							
Comment:									

Parameter fields:

- Provider
- Measure Set
- Patient Identifier (**Note:** See *Patient Identifier* definition in the table below)
- Encounter Date Range From - To

Table 3 contains information found on the Abstraction Detail Report.

**Table 3: Data Displayed on the Abstraction Detail Report**

Field	Description
Provider	Displays the name and identification number of the selected provider from the parameter screen
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen
Measure Set	The Measure Set as selected by the parameter choice. Values are Outpatient Quality Reporting OQR-AMI, OQR-Chest Pain, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Patient Identifier	Displays the identification number of the patient entered on the parameter screen. Valid value is the Patient Identifier as entered on the Patient Information screen (maximum 40 characters). Non-matching entries will result in a report with header information only.
First Name	The first name of the patient for the case
Last Name	The last name of the patient for the case

Field	Description
Encounter Date	Displays the date of the patient's health service encounter for the case
Arrival Time	Displays the arrival time of the patient's health service encounter for the case
Status	The status of the case: Complete, Pending, or Edit_Errors
Sex	The sex of the patient for the case
Race	The race of the patient for the case
Birthdate	The birthdate of the patient for the case
Hispanic Ethnicity	Yes or No regarding the Hispanic ethnicity of the patient for the case
Postal Code	Displays the postal code of the patient's residence for the case
Abstractor	Displays the User ID of the abstractor for the displayed abstraction case
Abstraction	Displays a list of the abstraction questions and the answers submitted for the case
Comments	Displays any comments entered for the case

### 4.3.1.2 Case Listing by Unique ID Report

The Case Listing by Unique ID Report provides a list of patients who were abstracted during the requested timeframe. All abstraction statuses are included in the report. The report is sorted by Encounter Date, then by Patient Identifier, then Arrival Time in ascending order. If no data is available for the selected parameters, the report displays only header information with the retrieval criteria entered by the user. Figure 52 displays a sample report.

**Figure 52: Case Listing by Unique ID Report**

<b>Report Run Date:</b> 01-22-2013	<b>Case Listing by Unique ID - Hospital OQR</b>			<b>Page:</b> 1 of 1
	<b>Provider:</b> john - 123832			
	<b>Encounter Date Range:</b> 01-21-2013 - 01-22-2013			
	<b>Measure Set:</b> OQR-AMI			
Patient Identifier	Encounter Date	Arrival Time	Abstractor ID	Abstraction Status
011	01-21-2013	UTD	ducks - 123832	COMPLETE

Parameter fields:

- Provider
- Measure Set
- Encounter Date Range From - To

Table 4 contains descriptions for the data that appears on the Case Listing by Unique ID Report.

**Table 4: Data Displayed on the Case Listing by Unique ID Report**

Field	Description
Provider	Displays the name and identification number of the selected provider from the parameter screen
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen
Measure Set	The Measure Set as selected by the parameter choice. Values are OQR-AMI, OQR-CP, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Patient Identifier	Displays the unique identifier of the patient for the case
Encounter Date	Displays the date of the patient's health service encounter for the case
Arrival Time	Displays the arrival time of the patient's health service encounter for the case
Abstractor ID	Displays the User ID of the abstractor for the displayed abstraction case
Abstraction Status	Displays the status of the case. Values are Complete, Pending, or Edit_Errors

#### 4.3.1.3 Measure Detail by Physician Report

The Measure Detail by Physician Report displays the overall measure outcome (category assignment) for all cases, with a status of complete, for the specified physician. In order to use this report, the abstractor would have had to complete the Physician 1 and/or Physician 2 fields in the abstraction for the core measure sets. Continuous Variable measures will not display in the Passed and Failed columns. The report is sorted by Encounter Date, Arrival Time, and then Measure in ascending order. If no data is available for the selected parameters, the report

displays only header information with the retrieval criteria entered by the user. Figure 53 displays a sample report.

**Figure 53: The Measure Detail by Physician Report**

Report Run Date: 01-18-2013		<b>Measure Detail by Physician - Hospital OQR</b>				Page: 1 of 2
Provider: test - 123456 Encounter Date Range: 01-01-2013 - 01-10-2013 Physician: aa Measure Set: OQR-AMI						
Encounter Date: 01-01-2013	Arrival Time: 11:00	Patient Identifier: 1				
Measure	Excluded	Passed	Failed	Continuous Variable	Unable to Calculate	
OP-1 Median Time to Fibrinolysis (CMS)				120		
OP-2 Fibrinolytic Therapy Received within 30 Minutes of ED Arrival (CMS)			X			
OP-3a Median Time to Transfer to Another Facility for Acute Coronary Intervention-Overall Rate (CMS)	X					
OP-3b Median Time to Transfer to Another Facility for Acute Coronary Intervention-Reporting Measure (CMS)	X					
OP-3c Median Time to Transfer to Another Facility for Acute Coronary Intervention-Quality Improvement Measure (CMS)	X					
OP-4 Aspirin at Arrival (CMS)		X				
OP-5 Median Time to ECG (CMS)					X	

Parameter fields:

- Provider
- Measure Set
- Physician (**Note:** See *Physician* definition in the table below)
- Encounter Date Range From - To

Table 5 displays descriptions for the fields on the Measure Detail by Physician Report

**Table 5: Data Displayed on the Measure Detail by Physician Report**

Field	Description
Provider	Displays the name and identification number of the selected provider from the parameter screen
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen
Physician	Displays the physician identifier entered on the parameter screen. The selection entered on the parameter screen will need to match the values entered in the abstractions for the PHYSICIAN 1 or PHYSICIAN 2 questions.
Measure Set	The measure set as selected by the parameter choice. Values are OQR-AMI, OQR-CP, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Encounter Date	Displays the date of the patient's health service encounter for the case

Field	Description
Arrival Time	Displays the arrival time of the patient's health service encounter for the case
Hospital Patient ID	Displays the identification number of the patient for the case
Measure	Displays the measures associated with the Measure Set as selected by the parameter choice
Excluded	<p>Displays 'X' in the column, if indicated, based on the measure outcome for each measure abstracted.</p> <p>Excluded = Bucket B</p>
Passed	<p>Displays 'X' in the column, if indicated, based on the measure outcome for each measure abstracted.</p> <p>Passed = Bucket E</p> <p>Continuous Variable measures will not display in the Passed and Failed columns.</p>
Failed	<p>Displays 'X' in the column, if indicated, based on the measure outcome for each measure abstracted.</p> <p>Failed = Bucket D</p> <p>Continuous Variable measures will not display in the Passed and Failed columns.</p>
Continuous Variable	Displays the calculated median value from continuous variable measures in minutes. The Continuous Variable field will be blank if a numerical value is not available or if it was excluded from measure calculation.
Unable to Calculate	Displays 'X' in the column if the measure outcome is unable to be calculated.

### 4.3.1.4 Measure Failure Report

The Measure Failure Report displays all cases, with a status of complete, that failed a measure (fell into Category Assignment D and is not a Continuous Variable measure), during the identified Encounter Date range. The report is sorted by Measure, then by Patient Identifier, Encounter Date, and Arrival Time in ascending order. If no data is available for the selected parameters, the report will display only header information with the retrieval criteria entered by the user. Figure 54 displays a sample report.

**Figure 54: Measure Failure Report**

Report Run Date: 11-30-2012		Measure Failure: Hospital OQR			Page: 1 of 1
Provider: Hospital_3 - 111111					
Encounter Date Range: 07-01-2012 - 10-30-2012					
Measure Set: OQR-AMI					
Measure	Patient Identifier	Encounter Date	Arrival Time	Abstraction Date	
OP-1: Median Time to Fibrinolysis					
	02	07-01-2012	1000	11-30-2012	
	111444	07-01-2012	1000	09-29-2012	
<b>Total:2</b>					
OP-2: Fibrinolytic Therapy Received within 30 Minutes of ED Arrival					
	111444	07-01-2012	1000	09-29-2012	
<b>Total:1</b>					
OP-5: Median Time to ECG					
	02	07-01-2012	1000	11-30-2012	
	111444	07-01-2012	1000	09-29-2012	
<b>Total:2</b>					

Parameter fields:

- Provider
- Measure Set
- Encounter Date Range From - To

Table 6 contains descriptions for the fields on the Measure Failure Report.

**Table 6: Data Displayed on the Measure Failure Report**

Field	Description
Provider	Displays the name and identification number of the selected provider from the parameter screen.
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen.
Measure Set	The Measure Set as selected by the parameter choice. Values are AMI, Chest Pain, Emergency Department, Pain Management, Surgery, and Stroke.
Measure	The Measure Set as selected by the parameter choice. Values are OQR-AMI, OQR-CP, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Patient Identifier	Displays the identification number of the patient for the case.

Field	Description
Encounter Date	Displays the date of the patient's health service encounter for the case.
Arrival Time	Displays the arrival time of the patient's health service encounter for the case.
Abstraction Date	Displays the date the abstraction was completed for the case.

### 4.3.1.5 Measure Summary Report

The Measure Summary Report provides an aggregate count of category assignments for each measure by provider. Continuous Variable measures will not display in the Passed and Failed columns. Totals are displayed with the numerator/denominator plus a percent for each category assignment. A description of the numerators and denominators is listed in the following table. The percentage is calculated from the numerator divided by the denominator for the measure.

This report is based on abstractions with a status of complete. The report is sorted by Measure Set, then by Measure in ascending order. Multiple measure sets may be selected for inclusion in the report. If no data is available for the selected parameters, the report displays only header information with the retrieval criteria entered by the user. Figure 55 displays a sample report.

Figure 55: Measure Summary Report

Measure	Excluded	Passed	Failed	Continuous Variable	Unable to Calculate
<b>OQR-AM</b>					
GP-1 Median Time to Fibrinolytic	344	75.0%		30	04 0.0%
GP-2 Fibrinolytic Therapy Received within 30 Minutes of ED Arrival	344	75.0%	144	25.0%	04 0.0%
GP-3a Median Time to Transfer to Another Facility for Acute Coronary Intervention-Overall Rate	344	75.0%		30	04 0.0%
GP-3b Median Time to Transfer to Another Facility for Acute Coronary Intervention-Reporting Measure	444	100.0%	044	0.0%	04 0.0%
GP-3c Median Time to Transfer to Another Facility for Acute Coronary Intervention-Quality Improvement Measure	344	75.0%		30	04 0.0%
GP-4 Arrive at Arrival	144	25.0%	344	75.0%	04 0.0%
GP-5 Median Time to ECG	044	0.0%		8	04 0.0%

Parameter fields:

- Provider
- Measure Set
- Physician – Optional (**Note:** See *Physician* definition in the table below)

Encounter Date Range From - To

Table 7 contains descriptions for the fields on the Measure Summary Report.

**Table 7: Data Displayed on the Measure Summary Report**

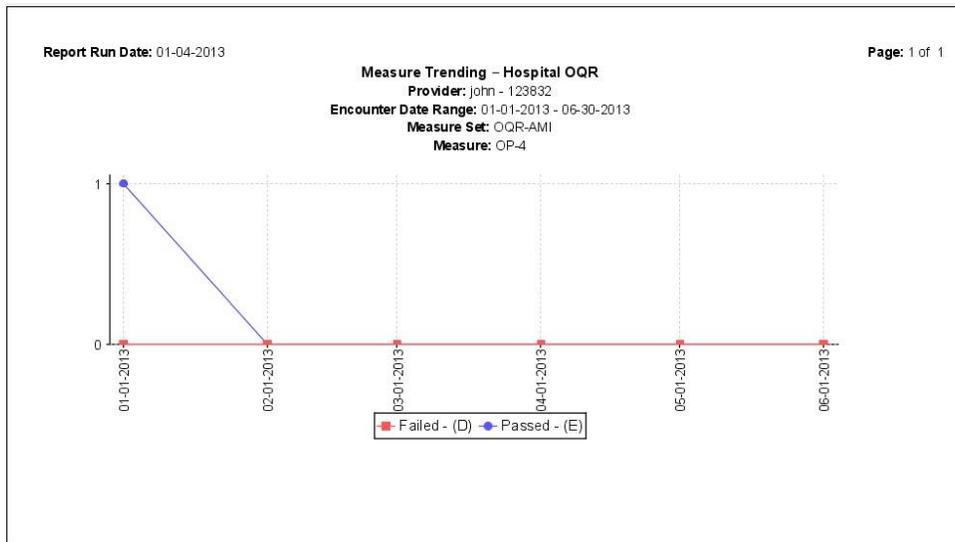
Field	Description
Provider	Displays the name and identification number of the selected provider from the parameter screen
Physician	Displays the physician identifier entered on the parameter screen. The selection entered on the parameter screen will need to match the values entered in the abstractions for the PHYSICIAN 1 or PHYSICIAN 2 questions.
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen
Measure Set	The Measure Set as selected by the parameter choice. Values are OQR-AMI, OQR-CP, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Measure	Displays the measures associated with the Measure Set as selected by the parameter choice
Excluded	Displays the number of excluded cases for the measure (Numerator)/total number completed (Denominator), and the percentage
Passed	Displays the number of cases that passed the measure (Numerator)/total number completed for the measure (Denominator), and the percentage
Failed	Displays the number of cases that failed the measure (Numerator)/total number completed for the measure (Denominator), and the percentage
Continuous Variable	<p>Displays the calculated median value from continuous variable measures in minutes. Continuous variable measures are:</p> <ul style="list-style-type: none"> <li>OP-1 Median Time to Fibrinolysis</li> <li>OP-3a Median Time to Transfer to Another Facility for Acute Coronary Intervention – Overall Rate</li> <li>OP-3b Median Time to Transfer to Another Facility for Acute Coronary Intervention – Reporting Measure</li> <li>OP-3c Median Time to Transfer to Another Facility for Acute Coronary Intervention – Quality Improvement Measure</li> <li>OP-5 Median Time to ECG</li> <li>OP-18a Median Time from ED Arrival to ED Departure for Discharged ED Patients – Overall Rate</li> <li>OP-18b Median Time from ED Arrival to ED Departure for Discharged ED Patients – Reporting Measures</li> <li>OP-18c Median Time from ED Arrival to ED Departure for Discharged ED Patients – Psychiatric/Mental Health Patients</li> <li>OP-18d Median Time from ED Arrival to ED Departure for Discharged ED Patients – Transfer Patients</li> </ul>

Field	Description
	OP-20 Door to Diagnostic Evaluation by a Qualified Medical Personnel OP-21 Median Time to Pain Management for Long Bone Fracture The Continuous Variable field will be blank if a numeric value is not available or if it was excluded from measure calculation.
Unable to Calculate	Displays the number of cases that were unable to be calculated for the measure (Numerator)/total number of abstractions with a status of Complete that were unable to be calculated for the measure (Denominator), and the percentage

### 4.3.1.6 Measure Trending Report

In graph format, the Measure Trending Report displays the total number of abstractions that passed (Category E) or failed (Category D) over a selected time period. Only data for abstractions with a status of complete are included in this report. If no data is available for the selected parameters, the report displays only header information with the retrieval criteria entered by the user. Figure 56 displays a sample report.

**Figure 56: Measure Trending Report**



Parameter fields:

- Provider
- Encounter Date Range
- Measure Set
- Measure

Table 8 contains descriptions for the fields on the Measure Trending Report.

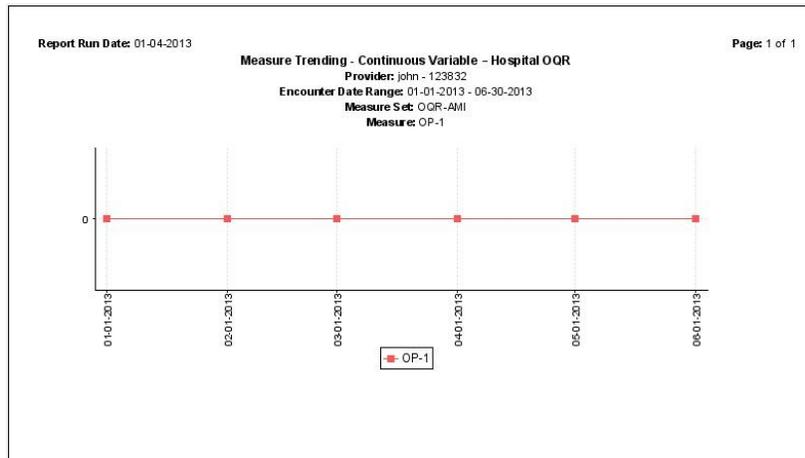
**Table 8: Data Displayed for the Measure Trending Report**

Field	Description
Provider	Displays the name and identification number of the selected provider from the parameter screen
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen
Measure Set	The Measure Set as selected by the parameter choice. Values are OQR-AMI, OQR-CP, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Measure	Displays the measure associated with the Measure Set as selected by the parameter choice
Y-Axis (left-side of the graph)	Displays the total number of abstractions that passed or failed for each month
X-Axis (bottom of the graph)	Displays each month of the selected time period

#### 4.3.1.7 Measure Trending – Continuous Variable Report

The Measure Trending – Continuous Variable Report displays the Median of all continuous variable measure values for each month contained in the Encounter Date range. Only data for abstractions with a status of complete are included in this report. If no data is available for the selected parameters, the report displays the graph with zeros. Figure 57 displays a sample report.

**Figure 57: Measure Trending – Continuous Variable Report**



Parameter fields:

- Provider
- Encounter Date Range
- Measure Set
- Measure

Table 9 contains descriptions of the fields on the Continuous Variable Report.

**Table 9: Data Displayed on the Measure Trending – Continuous Variable Report**

Field	Description
Provider	Displays the name and identification number of the selected provider from the parameter screen
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen
Measure Set	The Measure Set as selected by the parameter choice. Values are OQR-AMI, OQR-CP, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Measure	Displays the measure associated with the Measure Set as selected by the parameter choice
Y-Axis (left-side of the graph)	Displays the median of all Continuous Variable Measure values for each month of the selected time period

Field	Description
X-Axis (bottom of the graph)	Displays each month of the selected time period

### 4.3.1.8 Measures Report

The Measures Report provides an overall total number of complete abstractions for a provider for the selected measure set including a breakdown of the age, sex, and measure rates. This report displays the numerator, denominator, and percentage for each age category, sex category, and each measure. If no data is available for the selected parameters, the report displays only header information with the retrieval criteria entered by the user. Figure 58 displays a sample report.

Figure 58: The Measures Report



Parameter fields:

- Provider
- Measure Set
- Physician – Optional (**Note:** See *Physician* definition in the table below)
- Encounter Date Range From – To

Table 10 contains descriptions of the fields on the Measures Report. Table 11 contains descriptions of the footnotes that may appear on the report.

**Table 10: The Measures Report**

Field	Description
Provider	Displays the name and CMS Certification Number of the selected provider from the parameter screen
Physician	Displays the physician identifier entered on the parameter screen. The selection entered on the parameter screen will need to match the values entered in the abstractions for the PHYSICIAN 1 or PHYSICIAN 2 questions.
Encounter Date Range	Displays the health service encounter date range selected from the parameter screen
Measure Set	The Measure Set as selected by the parameter choice. Values are OQR-AMI, OQR-CP, OQR-ED Throughput, OQR-Pain Management, OQR-Surgery and OQR-Stroke.
Total Medical Records Abstracted	Displays the total number of medical records abstracted for the selected measure set
Age Breakdown	Mean Age (years) is calculated from all abstractions for the selected measure set. The Mean Age rows contain a numerator/the denominator and a percentage.
N/D	Displays the number of cases falling into the respective age category (Numerator)/total number completed for the measure set (Denominator)
Percent	Displays the percentage calculation from the numerator divided by denominator for the measure set
Sex Breakdown	Sex breakdown is calculated from all abstractions for the selected measure set. Values are Male, Female, and Unknown. The gender rows contain a numerator/the denominator and a percentage.
N/D	Displays the number of cases falling into the respective gender category (Numerator)/total number completed for the measure set (Denominator)
Percent	Displays the percentage calculation from the numerator divided by denominator for the measure set

Field	Description
Measures	Displays the measures associated with the Measure Set selected. The Measure rows contain a numerator/denominator and a percentage.
N/D	Displays the number of cases that passed the measure [E Category assignment] (Numerator)/total number that were assigned the D and E Category assignment for the measure (Denominator).  Category D = In Measure Population Category E = In Numerator Population
Percent	Displays the percentage calculation from the numerator divided by denominator for the measure set

Table 11: Measures Footnotes

Footnote	Description
No cases eligible for inclusion within the denominator.	This footnote references the 'N/D' and 'Percent' columns. It is associated with a 0/0 value for numerator/denominator.
The time (in minutes) will be displayed in the N/D column. There will be no percent for this measure because it is a continuous variable.	This footnote references the 'N/D' column. It is associated with an hh:mm value for numerator/denominator for continuous variable measures with a category assignment equal to D.

## 4.4 Import

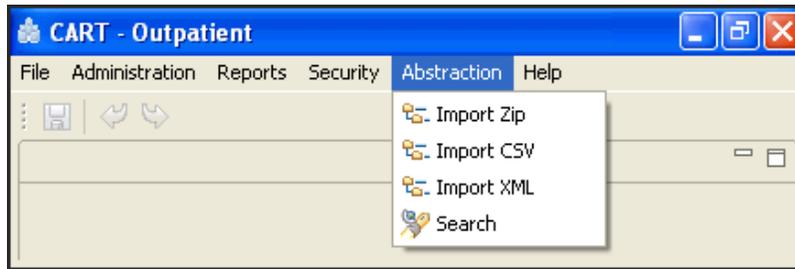
The import function enables the System Administrator user type to import data into CART – Outpatient. All abstractions, regardless of abstraction status (Complete, Pending, or Edit Errors) can be imported. The Provider has to be added to CART – Outpatient prior to import. Once abstraction data is imported, the Patient Information section will be updated with the new patient data.

CART – Outpatient has the ability to import CSV and XML files containing case-specific information or zip files containing XML files. An importLog.xls file is created for every import and is saved in the `\QMS30\workspace\Outpatient` directory where CART – Outpatient was installed. Please note that 'Answer Value' rows within XML files are not supported. Example: `<answer-value>1</answer-value>`

To import into CART – Outpatient:

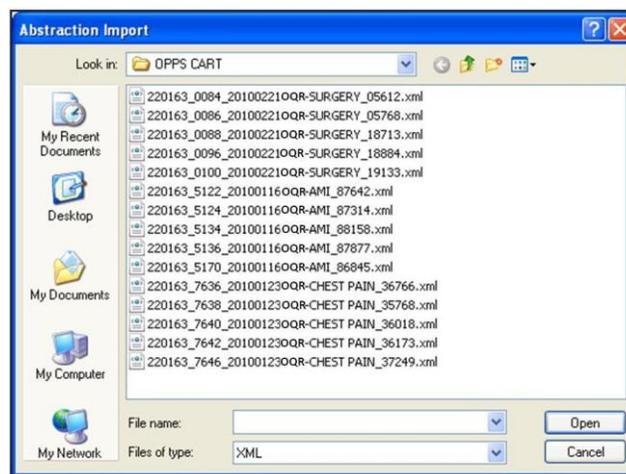
1. Select an import file type (see Figure 59).

Figure 59: Import File Types



2. An Abstraction Import screen appears. Navigate to the folder containing the files to be imported (see Figure 60).

Figure 60: Abstraction Import Screen



3. Select one or more files that you want to import and click **Open**. To select more than one file, click **Ctrl** and select the specific files to import. To select all files, click **Shift** and click the first and last file you want to import.
4. An Overlay existing records message appears. Click **Yes** to overlay existing records or **No** to import only records that are not currently in the system. Figure 61 displays the Overlay message.

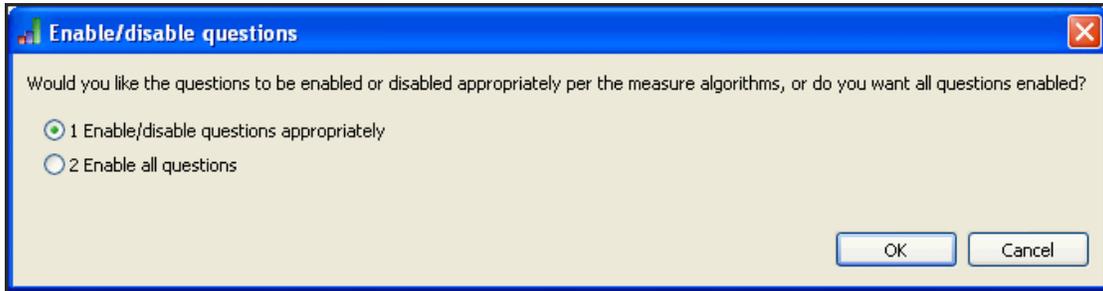
If you select No to overlay existing records, the statistics page will list the file as 'skipped' since you have chosen not to overlay the files.

Figure 61: Overlay Existing Record(s) Message



- An enable/disable questions message appears. Choose an option and click **OK** (see Figure 62).

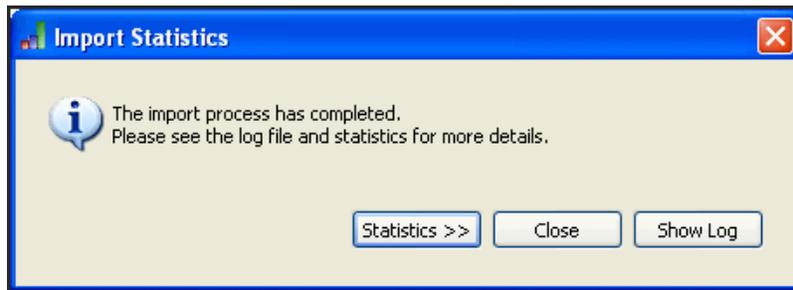
**Figure 62: Enable/Disable Questions Message**



If a current record exists that is overwritten by the new imported record and the **Enable/disable questions** answer is modified from the original record, any complete case will change to pending and skip patterns will be based on the current response to the enable/disable question.

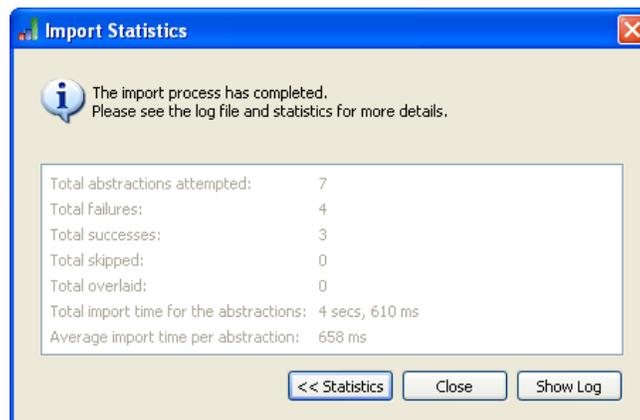
- An Import Statistics message then appears (see Figure 63).

**Figure 63: Import Statistics Message**



- Click **Statistics** to view a summary listing the total abstractions attempted; failures; successes; skipped; overlaid; and the total and average import times in milliseconds (see Figure 64).

**Figure 64: Import Statistics Screen**



- Total abstractions attempted – Displays the number of records selected for import
  - Total failures – Displays the number of records that were not successfully imported
  - Total successes – Displays the number of records that were successfully imported
  - Total skipped – Displays the number of records that were skipped based on your decision to not overlay existing records
  - Total overlaid – Displays the number of records that were overwritten based on your decision to overlay existing records
  - Total import time for the abstractions – Displays the amount of time it took to import the records in seconds and milliseconds
  - Average import time per abstraction – Displays the average amount of time to import each record in milliseconds
8. Click **Show Log** to view the detailed results of the import validation, including errors (see Figure 65).

**Figure 65: The Import Validation Log**

	Submission	Type	Error	Message
1				Starting Import with 15 record(s)...
2	220163_7646_20100123OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING
3	220163_0084_20100153OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING
4	220163_0085_20100124OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING
5	220163_0826_20100123OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING
6	220163_7636_20100127OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING
7	220163_7369_20100123OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: COMPLETE
8	220163_7369_20100123OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING
9	220163_7582_20100125OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING
10	220163_7582_20100125OQR-CHEST PAIN_37249.xml	INFO		Import Successful with following status: PENDING

9. Click **Close** to close the Import Statistics screen and exit the import process.
10. To view the imported records, click **Search** on the Abstraction Search screen.

## 4.5 Export and Data Submission

The export function enables the System Administrator user type to export data from CART – Outpatient. All abstractions regardless of status (Complete, Pending, and Edit Errors) can be exported.

### 4.5.1 Export Abstraction

The CART – Outpatient tool provides the ability to export data in various file types. With the export process, the user must specify the action to be taken by the Clinical Warehouse with the file. Once the abstraction export file has been created (.xml or .zip), it can be submitted to the Clinical Warehouse by uploading the files via the QualityNet website (<http://www.qualitynet.org>).

Users are able to export in CSV format, but CSV is not supported in the other options within the export process. Table 12 contains descriptions of the export file type options.

CART defaults the location to the QMS30\workspace\Outpatient\export subfolder of the directory where CART – Outpatient is installed. The user can browse in order to select a different location.

**Table 12: Export File Type Options**

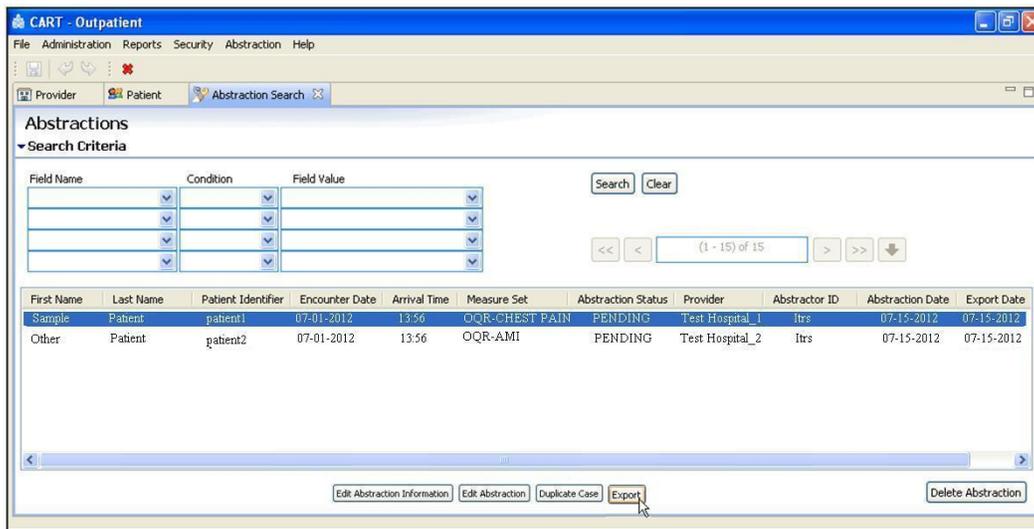
File Type	Description
XML	Creates a separate XML for each abstraction selected and exported. Each case must have a separate XML file created for the cases to be accepted into the OQR Clinical Warehouse.
ZIP	Exports abstraction information into a ZIP file (data compressed format) of one or more XML files. The ZIP file can be submitted to the OQR Clinical Warehouse.
Excel	Creates an Excel file of the Abstractions you exported. A separate Excel file is created for each Measure Set. Separate tabs are created in the Excel file for each discharge timeframe if the abstractions you are exporting are from more than one discharge timeframe. If the Excel file type is selected, the Export Type and Action Type fields are disabled. If you are including user-defined elements in your export, any new grid elements that were created in CART Module Designer and integrated into CART – Outpatient will only have the first 10 rows in the grid included in the Excel export. This file cannot be submitted to the OQR Clinical Warehouse.
CSV	Creates a comma-separated file of the abstractions you exported. The format of the CSV file follows the Uniform Billing File Import File Layout posted on the QualityNet website under Hospitals-Outpatient/Data Collection (& CART)/Uniform Billing File Layout. All abstractions are included in one file, including all measure sets for a specific discharge timeframe. If the CSV file type is selected, the export type and action type fields are disabled. This file cannot be submitted to the OQR Clinical Warehouse.
Add	Indicates the user wants the .XML file to be added to the <b>OQR</b> Clinical Warehouse.

File Type	Description
Delete	<p>Gives the user the ability to create an XML file with a delete request. When a case is submitted to the <b>OQR</b> Clinical Warehouse with a delete request, the particular records will be removed.</p> <p>To delete an existing file, the following fields <b>must</b> match in the <b>OQR</b> Clinical Warehouse: Provider ID, Patient Identifier, Encounter Date, Arrival Time, and Measure Set.</p>

To export abstractions:

1. From the Abstractions screen, select the desired abstractions (see Figure 66).

**Figure 66: The Abstractions Screen**

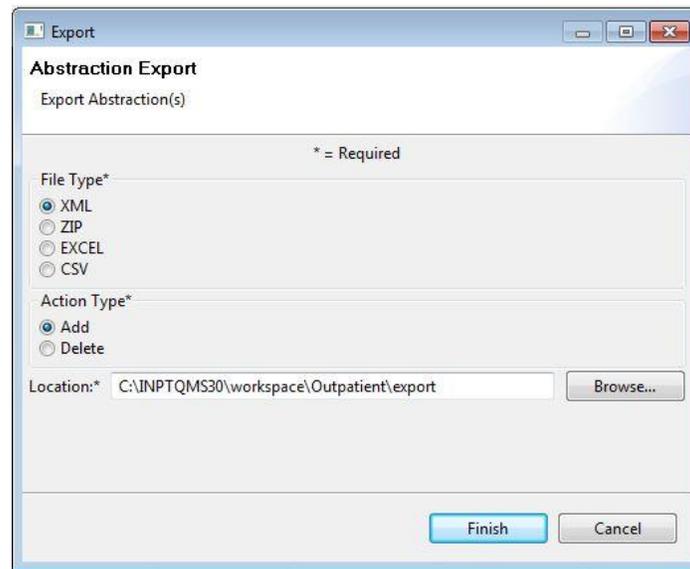


To easily identify the cases, you can sort by any of the fields displayed. To toggle between ascending and descending order of the field, click on the field name and an arrow will appear next to the field name. To reverse the sort, click on the field name again.

2. Click **Export**. The Abstraction Export screen appears.

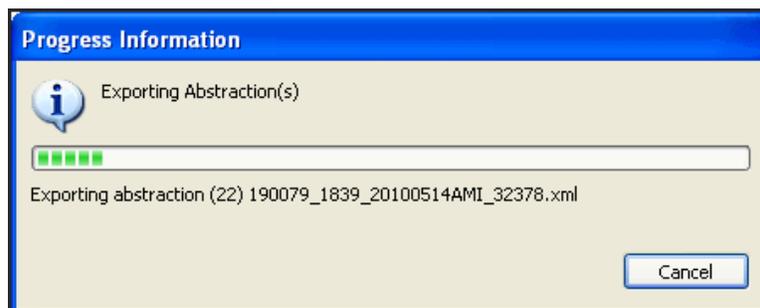
The system defaults the file type to XML, the action type to Add, the location to the QMS30\workspace\Outpatient\export subfolder of the directory where CART – Outpatient is installed. Change the selections as desired.

3. Select a **File** and **Action Type** and click **Finish** (see Figure 67).

**Figure 67: Abstraction Export Screen**

To delete an existing file, the following fields must match in the **OQR** Clinical Warehouse: Provider ID, Patient Identifier, Encounter Date, Arrival Time, and Measure Set.

4. A Progress Information dialog box may appear, indicating the export procedure is running (see Figure 68).

**Figure 68: Progress Information Message**

5. When the export is complete, an Export Statistics screen appears.
6. Click **Statistics** to view the results of the export. Information displayed includes:
  - Location where the export files were saved
  - Total number of abstractions exported
  - Total export time for the abstractions
  - Average export time per abstraction in milliseconds
7. Click **Close** to close the statistics message.

### 4.5.1.1 Export File Naming Convention

CART – Outpatient automatically assigns a name to the exported files. An underscore separates the different sections of the name. XML file types are not separated between the Patient’s Admit Date and the Measure Set. Table 13 through Table 16 contains descriptions of the content for different file types.

**Table 13: File Name Components of a Sample XML File Named 123456\_6789\_20120803AMI\_23366.xml**

File Name Component	Represents
123456	CMS Certification Number from the case
6789	Last four digits of the patient’s Patient Identifier
20120803 (August 03, 2012)	Patient’s Admit Date
AMI	Measure Set
23366 (Milliseconds)	Last five digits of export timestamp
File Type	.xml

**Table 14: File Name Components of a Sample CSV File Named 11242010\_42093.csv**

File Name Component	Represents
11242012 (November 24, 2012)	Export Date
42093 (Milliseconds)	Last five digits of Export timestamp
File Type	.csv

**Table 15: File Name Components of a Sample ZIP File Named 11242012\_013518.zip**

File Name Component	Represents
11242012 (November 24, 2012)	Export Date
013518 (hours/minutes/seconds)	Last six digits of export timestamp
File Type	.zip

**Table 16: File Name Components of a Sample XLS File Named OQR-AMI\_11242012\_42093.XLS**

File Name Component	Represents
AMI	Measure Set
11242012 (November 24, 2012)	Export Date
42093 (Milliseconds)	Last five digits of export timestamp
File Type	.xls

#### 4.5.1.2 Export Data – Standalone Database Options

Depending on whether you are using multiple PCs or one PC at your site to collect CART – Outpatient data, there are two options for exporting the data:

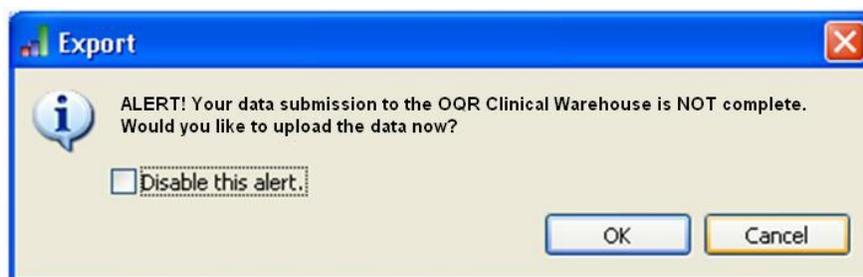
- You can export the data from each PC and submit each export file to the OQR Clinical Warehouse.
- If using multiple PCs, you also can export the data from each PC and import it into one PC. You then can export the data from the one PC that contains *all* of the data and submit it to the OQR Clinical Warehouse.

#### 4.5.2 Data Submission

After an export file has been created, it can be submitted for inclusion into the OQR Clinical Warehouse by uploading the files via the secure pages of the [QualityNet](#) website.

An alert will pop-up that states: ALERT! Your data submission to the OQR Clinical Warehouse is NOT complete. Would you like to update the data now? (See Figure 69)

**Figure 69: Export Alert Window**



the QualityNet Home Page is a secure, interactive website that enables the direct exchange of files between two or more individuals and/or organizations over the Internet. QualityNet is the only CMS-approved method for the electronic transmission of private data.

For further information regarding QualityNet, access the [QualityNet](#) website and refer to **Getting Started with QualityNet**. To upload data via the QualityNet Home Page (the secure section of QualityNet), you must be a registered user with the “Hospital Outpatient (HOP) QDROP Data

Upload” role. Complete instructions for uploading data to the **OQR Clinical** Warehouse and roles required to submit data and view reports can be found in the HQR Online Help and HQR Reports Online Help, available via the QualityNet Secure Portal.

## 5. Troubleshooting & Support

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### 5.1 Support

For help desk support/system support, contact:

QualityNet Help Desk

866-288-8912

TTY: 277-715-6222

qnetsupport@sdps.org

### 5.2 Verify Version of CART – Outpatient

There are several instances when you may need to check the version of the tool and/or platform you are using. For example, this may be necessary when calling the QualityNet Help Desk for troubleshooting assistance or prior to doing an upgrade of the application.

To verify the version and features of CART – Outpatient installed on your PC:

1. Click **About Quality Management System**, located under the **Help** menu or on the Login screen.
2. The About Quality Management System message appears. In the example below (see Figure 70), the user has both inpatient and outpatient CART installed in the same directory. In the figure, the associated version of each tool is highlighted in yellow. Click **OK** to close.

Figure 70: About Quality Management Screen



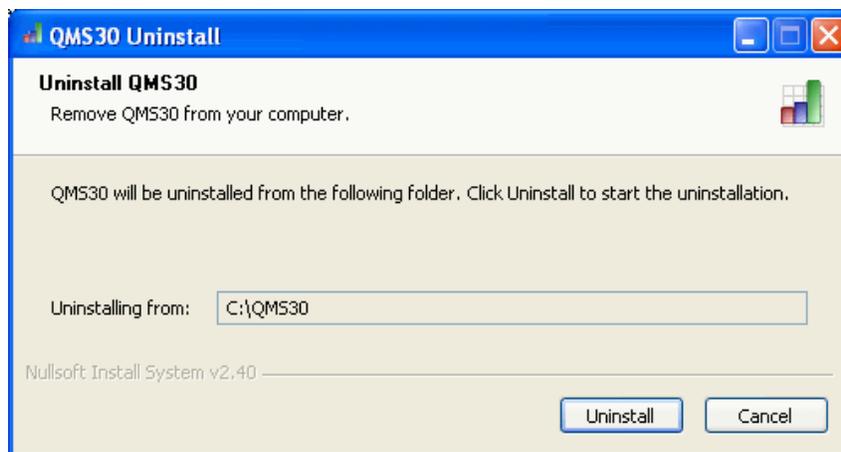
## 5.3 Uninstall Instructions

CART – Outpatient has an uninstall option available that enables you to uninstall the CART – Outpatient /QMS software. The same instructions apply whether you are uninstalling a Standalone, Client, or Server installation. It is recommended that all clients uninstall the software, before the server is uninstalled.

**WARNING:** Uninstalling QMS/CART – Outpatient will uninstall all archive files for standalone installations. Archives should be saved to a different directory. To uninstall QMS/CART – Outpatient:

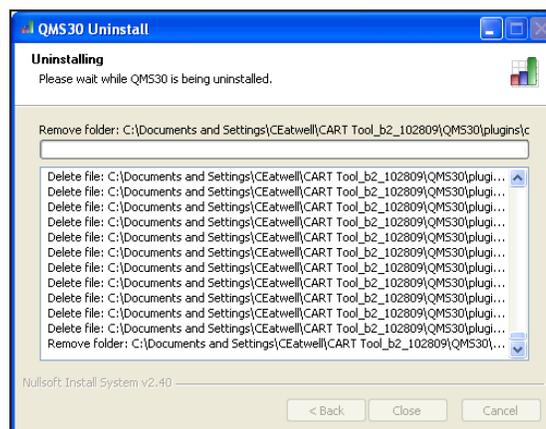
1. Verify that QMS/CART – Outpatient is closed.
2. Navigate to the drive and directory where QMS/CART – Outpatient is installed.
3. In the \_uninstall folder, double-click the **QMS-uninstall.exe** file.
4. In the QMS Uninstall screen, click **Uninstall** (see Figure 71).

Figure 71: QMS Uninstall Screen



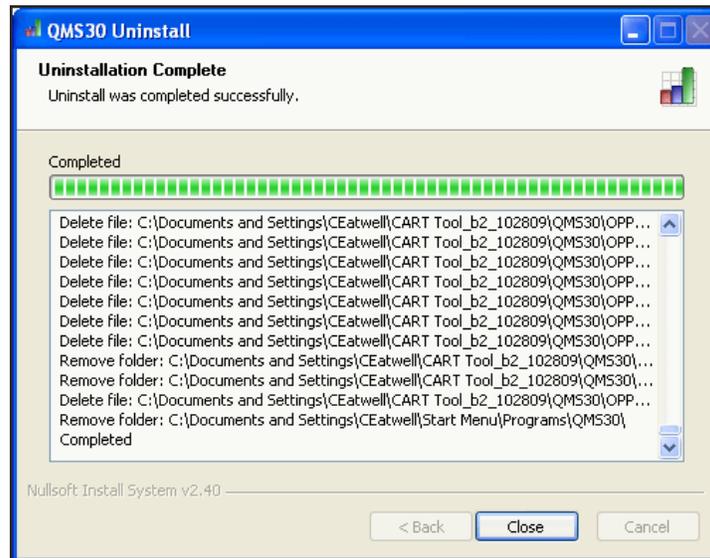
5. An Uninstall dialog window shows the progress of the uninstall process (see Figure 72).

Figure 72: QMS Uninstall Dialog Window Showing Uninstallation Progress



- When the Uninstallation Complete message appears, click **Close** (see Figure 73).

**Figure 73: QMS Uninstall Dialog Window Showing Uninstallation Complete**



- Navigate to the drive and directory where QMS/CART – Outpatient was installed. The directory as well as a few files will remain following the uninstall process.
- Delete the directory and all of its contents to complete the uninstall process.
- Reboot your workstation.

## Acronyms

This section describes the acronyms used in this document.

**Table 17: Acronyms**

Acronym	Literal Translation
AMI	Acute Myocardial Infarction
CART	CMS Abstraction and Reporting Tool
CMS	Centers for Medicare & Medicaid Services
CP	Chest Pain
CSV	Comma Separated Value
ED	Emergency Department
OPPS	Outpatient Prospective Payment System
OQR	Hospital Outpatient Quality Reporting
PDF	Portable Document Format
QIO	Quality Improvement Organization
XLC	CMS eXpedited Life Cycle (XLC)

## Glossary

**Abstraction:** A collection of information from a patient's medical record that is relevant to a given measure. CART provides the questions relevant to the measure and the abstractor supplies the information either via direct input or import.

**Measure:** A provider activity which is being evaluated for the purpose of improving the quality of health care. Measures belong to categories called Measure Sets. For example, a measure within the AMI Measure Set is "OP-4 Aspirin at Arrival". Data for a measure is gathered from a set of abstractions.

**Measure Set:** In CART Outpatient, any of the clinical areas defined either in The Specifications Manual for National Hospital Inpatient Quality Measures or by a CART user. Some examples of outpatient measure sets are: Acute Myocardial Infarction (AMI), Chest Pain, and Stroke (STK). Each measure set is divided into individual measures.

**Provider:** A person or facility providing health care services, e.g., Hospital, nursing home, doctor's office.

**The Joint Commission (TJC)** is a nonprofit organization that accredits more than 20,500 health care organizations and programs in the United States. Its goal is to improve the quality of health care. TJC collaborates with CMS to create the Specifications Manual for National Hospital Outpatient Quality Measures, which in turn defines most of the measures collected by CART. Refer also to Measure Set.

## Referenced Documents

Not applicable

## Record of Changes

Table 18: Record of Changes

Version Number	Date	Author/Owner	Description of Change
1.0	01/26/15	CSC/Nancy Goldberg	Initial Version