Stratis Health, based in Bloomington, Minnesota, is a nonprofit organization that leads collaboration and innovation in health care quality and safety, and serves as a trusted expert in facilitating improvement for people and communities.

This material was prepared by Stratis Health with funding from UCare.
This manual was created to provide detailed instructions for participants in the Rural Palliative Care Measurement Pilot Project on how to use and submit data to Stratis Health related to the Patient-Level Data Collection Tool. It has been adapted to remove the data submission requirement.

**Patient-Level Data Collection Tool**
The Patient-Level Data Collection Tool may be used to gather information on demographics, quality indicators, and utilization trends. The majority of the information gathered for this tool should be obtained through medical records abstraction. The tool was adapted from an existing tool developed by IPRO.

**Components available from Stratis Health:**
- **Patient-Level Data Collection Tool** – a data collection tool in Excel, and also in a Word format that may be printed and used for collecting chart elements on paper before entering into the tool
- **Data Dictionary** – a Word document that explains each data element

**Indicators**
The data entered in the Patient-Level Data Collection Tool will be used together to calculate a set of indicators. The indicators can be calculated in the Excel tool for tracking at your program level. A summary of the indicators are listed below.

**Based on the National Quality Forum Endorsed Palliative and End of Life Care Measures**
- Percentage of palliative care patients who were screened for pain during the palliative care initial encounter
- Percentage of palliative care patients who screened positive for pain and received a clinical pain assessment within 24 hours of screening
- Percentage of palliative care patients who were screened for dyspnea during the palliative care initial encounter
- Percentage of palliative care patients who screened positive for dyspnea who received treatment within 24 hours of screening
- Percentage of palliative care patients with documentation in the clinical record of a discussion of spiritual/religious concerns or documentation that the patient/caregiver did not want to discuss

**Additional indicators/demographic categories**
- Primary diagnosis group
- Reason for initial patient consultation
- Reason for patient discharge
- Breakdown of palliative care patient housing/living situation
- Average number of inpatient stays 6 months prior to beginning palliative care
- Average number of emergency department visits 6 months prior to beginning palliative care
- Average inpatient days 6 months prior to beginning palliative care
- Average number of inpatient stays and days since starting palliative care (only for patients receiving services for at least 60 days)
- Average number of emergency department visits since starting palliative care (only for patients receiving services for at least 60 days)
How to use the Patient-Level Data Collection Tool

Getting started
Open the Excel document. Your screen will look like the image to the right.

You need to have macros enabled. A macro is a code that runs in the background of the Excel tool. It automates tasks, such as calculations of the measures we collect. The instructions for how to enable macros will depend on the version of Excel you are using.

In Excel if Security Warning Appears on Opening File:
- Click on “Options” in the Security Warning at the top of your page.
- Click “Enable this content” under Macros.
- Ignore the rest of the options. Click “OK”.

In Excel 2003:
- In the main toolbar, click on “Tools,” then click on “Options”.
- Select “Macros” from this menu, then click “Security” – a new window will appear.
- Click on the “Trusted Publishers” tab.
- Check the box next to “Trust all installed add-ins and templates”.
- Click “OK”.

In Excel 2007 or 2010:
- Click the Windows symbol (see image at right).
- Click “Excel Options” at the bottom of the list that appears.
- Click “Trust Center”.
- Click “Trust Center Settings”.
- Click “Macro Settings”.
- Select “Disable all macros except digitally signed macros”.

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Entering and saving data

One you enable macros, your screen will look similar to this. In the yellow boxes, enter your program name, the person doing data entry, and today’s date – then click “add new record”.

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Please enable Macros:
1. Select “Tools” in the tab above, then find “Macros” and click “Security”.
2. On the “Security Level” Tab select “Medium”, click “OK” and exit Excel.
3. When Excel restarts you should now be able to click a box which says “Enable Macros”.

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After you add a new record, this screen will appear showing the information you just entered at the top.

**Example of New Record**

![Data Entry Form]

The column which is primarily yellow is the *only* column you need to use for data entry. Answer every data element as best you can. Every time you type a response to a question, you can either press “Enter” on your keyboard or click on the next data-entry box. Most of the questions have a drop-down menu that lets you select the most appropriate response. For example, for Question 5, “Who referred the patient to palliative care? (Select one)”, the menu options appear when you click on the yellow box on the same line, as seen in the screen capture below.
Example of Dropdown Menu

Some questions only apply depending on how you answered a proceeding question. Their answer boxes will become grey if they do not apply and you will not be able to enter a response. For example, if you respond “No” to Question 7, none of Questions 8 through 12 are relevant. If you respond “Yes” to Question 7, the gray boxes for Questions 8 through 12 will turn yellow and you will be able to answer the questions.

IMPORTANT: For Questions 55, 56, and 57 (Number of emergency department visits, inpatient days, and inpatient days since start of palliative care), ONLY enter information if the patient has been enrolled in palliative care for at least 60 days. These questions look at long-term trends in utilization for palliative care patients.

Once you have answered all questions on this page, click “Save Entry” at the top. When you click here, you will be taken to the Records page, which looks like this:
This page is a directory of all the patient records you have entered. If you need to change or update anything, just click on the appropriate line and then click “Open Record.”

**Looking at a report**

This tool has the capacity to run aggregate reports of all the data you have entered. The reports are based on the indicators we’re collecting (described above). To run a report for your own internal use, follow these steps:

From the Records page (at right) (note: you will have more than one entry listed), click on “Reports”.

This will generate a report, which looks similar to the example on the following page.
Troubleshooting and Potential Questions
This tool is a very large file size. Because of this, saving a record or running a report may take longer than you are used to.

If you have any challenges in entering and saving data, or if you think something may be calculated incorrectly, please contact us. We can look at the code running in the background to fix any problems.

We can also tell you how to access a table that shows all of your “raw” entered data instead of the calculated measures, in case you are interested in doing any of your own analysis.