Finding Duplicated Services in CAREWare

These instructions should help you find any occurrences of the same service being logged more than once a day (duplicated services). This report should help "reduce the size of the haystack" and eliminate false duplicate services.

Here is a legitimate duplicate service example. A female patient could have an Ambulatory Care visit with her PCP then see her GYN for an annual exam the same day. CAREWare allows both services to be entered using the same Service Category since both are Ambulatory Care items.

The most common reason for duplicate services is data entry error. This report should help you find, fix, and reduce errors in your Annual Data Report.

I will discuss the fields we want and how to export the results to Excel. Excel has filtering options that allow the user to sift through large quantities of data easily. You can then report on filtered data in the Excel file without printing a huge report.

Please note:

The first image uses the Name field. In order to protect our clients, but give you a sense of the results, I used the eURN field instead of the name. Please make sure to use the Name field in your report set up.

This report is a Services Custom Report. I will assume you already know how to set up a basic Custom Report and will not repeat those steps here.

The premise here is to list the name, date, services logged and count the occurrences of a service for that particular day.

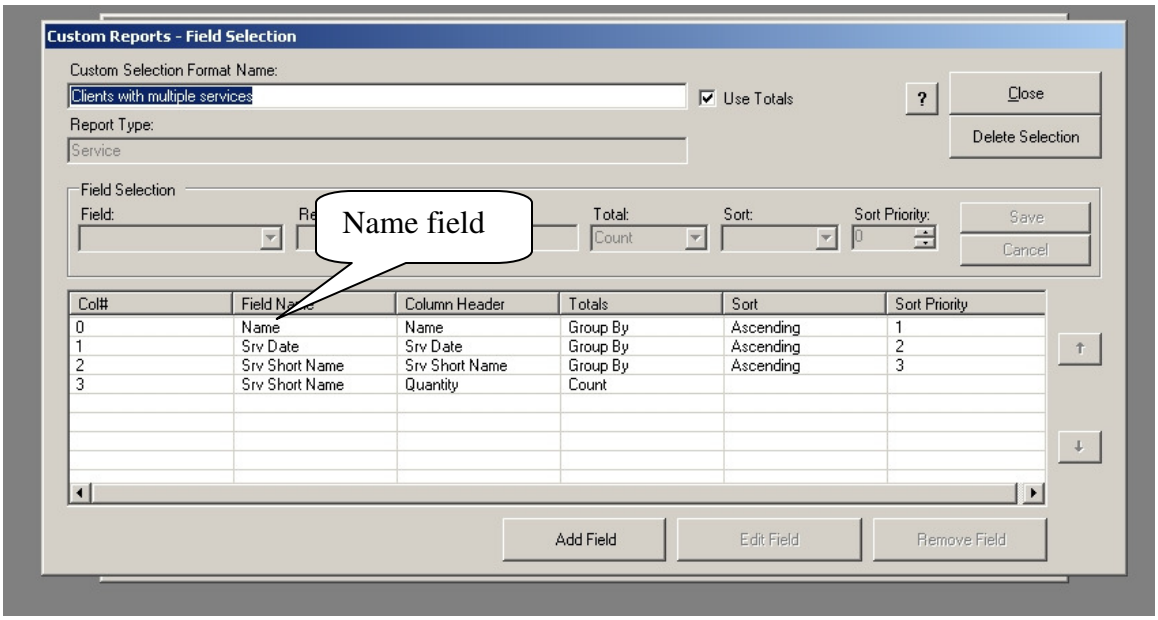
You can use the filter option to select only specific services; this report shows all of them. The resulting list in Excel should be small enough to allow manual review even if you choose everything.

This CAREWare report generates 11,351 entries for services rendered Jan 1, 2007 to Aug 31, 2007. The Excel filter reduced that to 68 entries with 2 duplicated services in one day and three entries with 3 duplicated services in a day. That can really speed up the error review process.

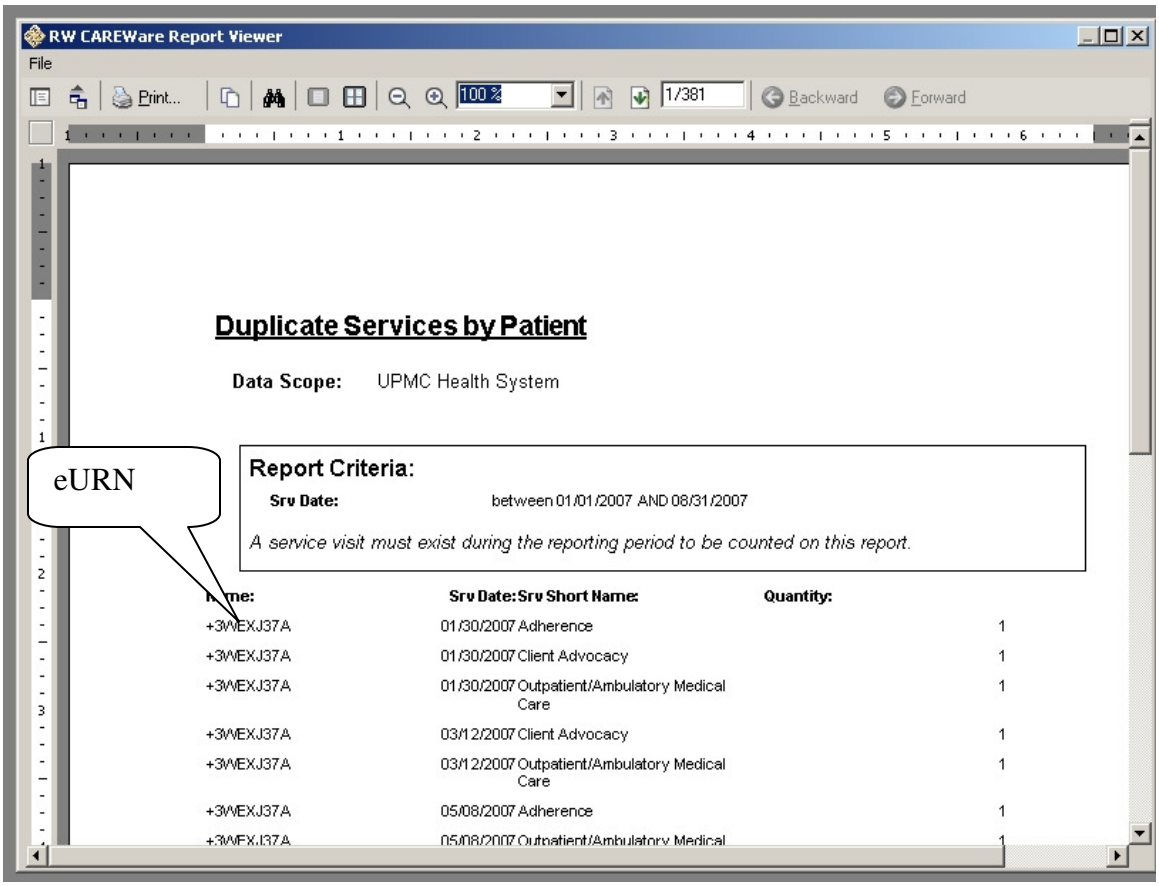
This image shows the custom report layout for this report. Note that the “Use Totals” box is checked.

The grouping option forces the last “Group By” field to be counted as shown below. Services are summarized so they can be counted.

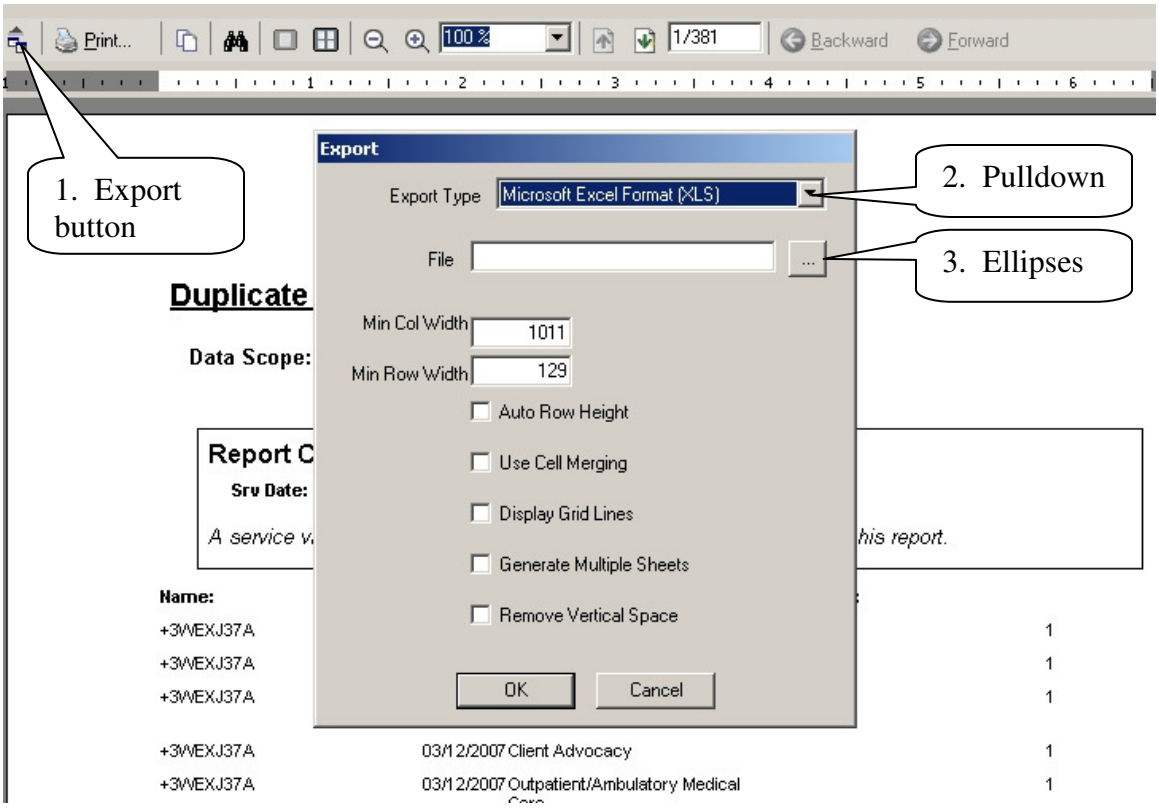
It’s also important that the fields be sorted in this order.



Run the report with the desired date range as you would any other custom report. Here is a shot of the results:

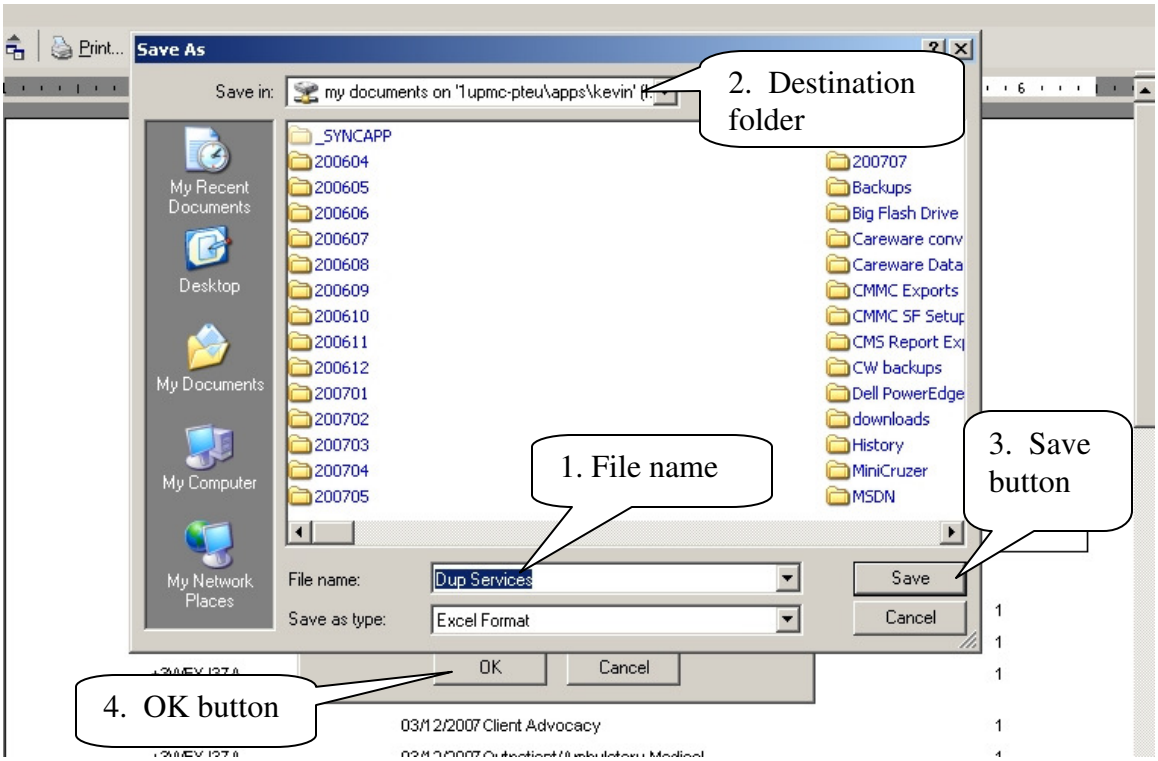


Click on the Export Button (1), the icon to the left of the Print button. You may also click on the word "File" in the top menu. Use the pull down (2) to select Export to XLS format as shown here:



Click on the ellipses (the box with the 3 dots) to tell CAREWare where to store your file and to give it a file name.

Here is an example:



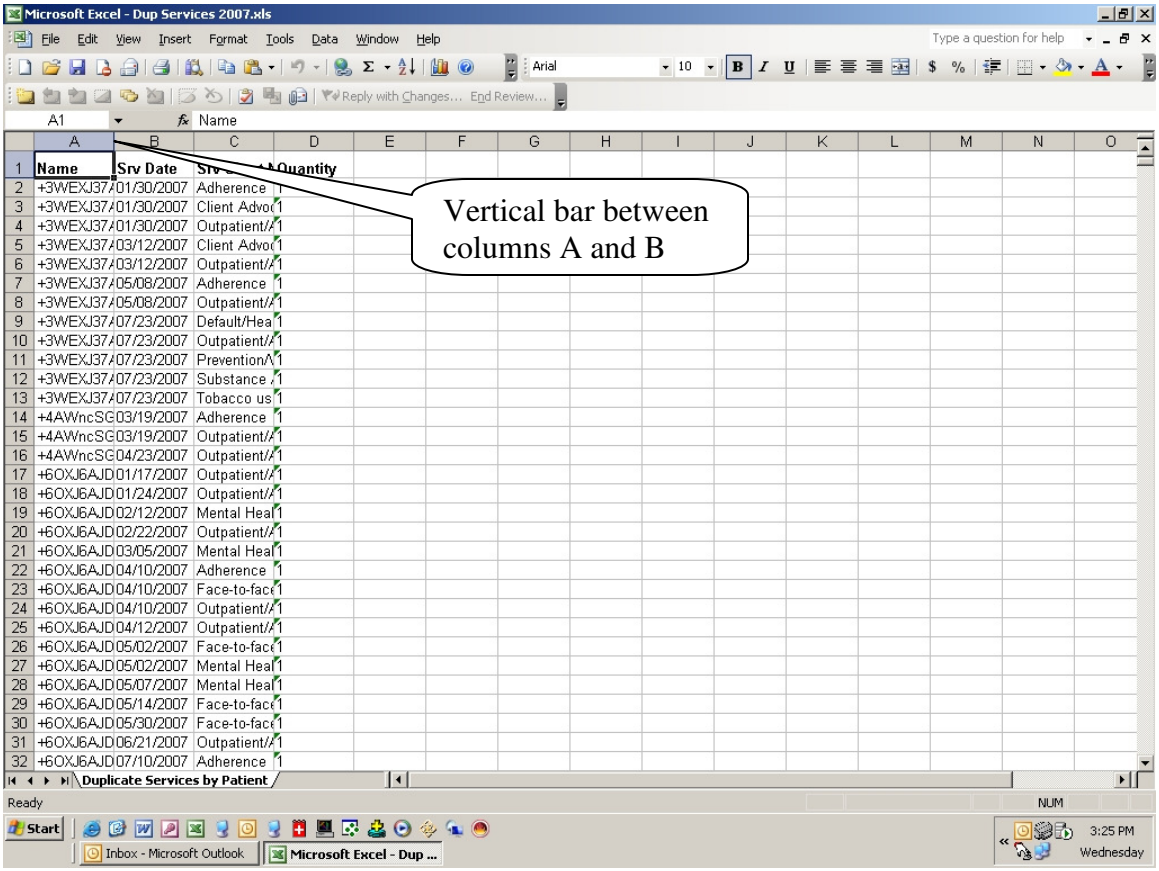
I named the file Dup Services (1). CAREWare will store the Excel file in the selected folder.

Please note where you told CAREWare to store your file. The destination folder (2) is shown at the top of the dialog box. Most of you will probably store the file in My Documents.

Click on the Save button (3). The File Save box disappears.
Click the OK button (4) on the CAREWare dialog box (shown behind the File Save box).
Wait for the hourglass to disappear.
Close the custom report preview window.
You may also exit CAREWare if you want.

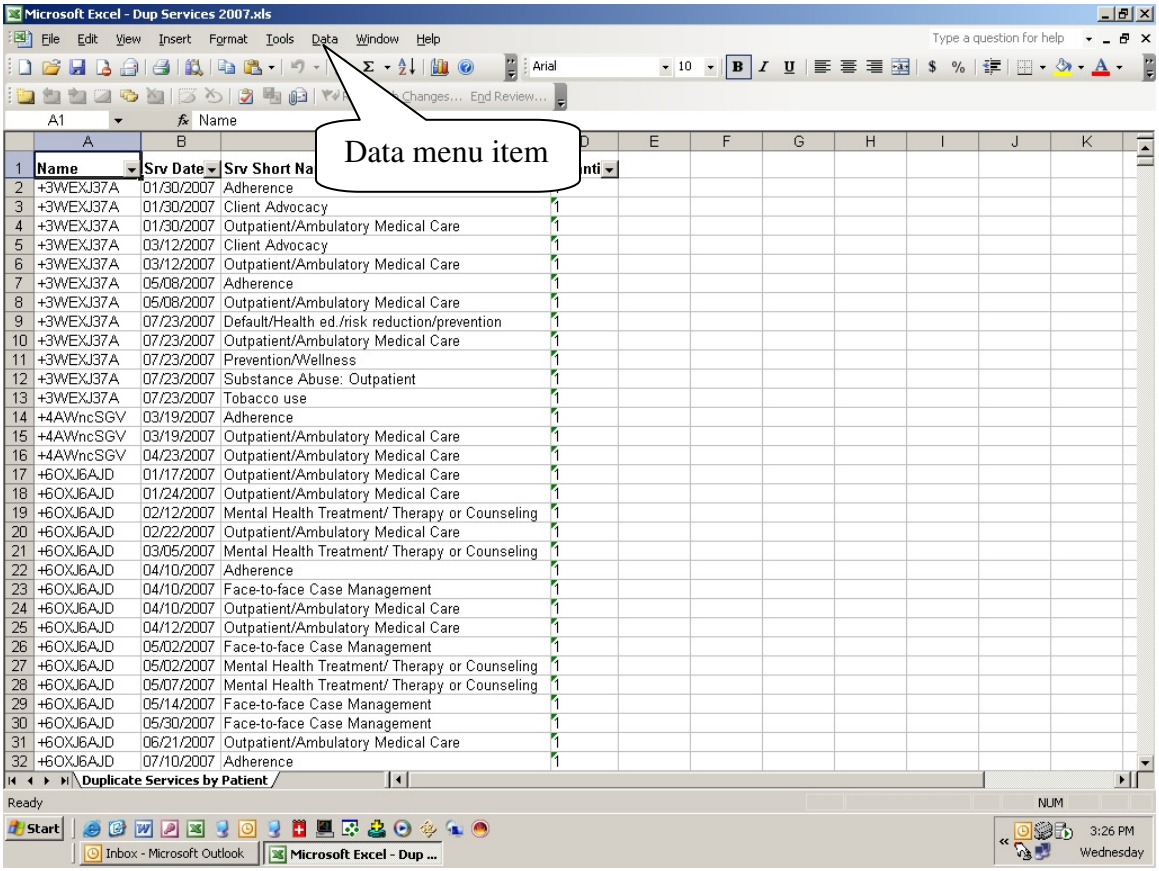
Open Excel on your PC. You will see an empty grid on your screen.
Open the XLS file you saved in the previous step.

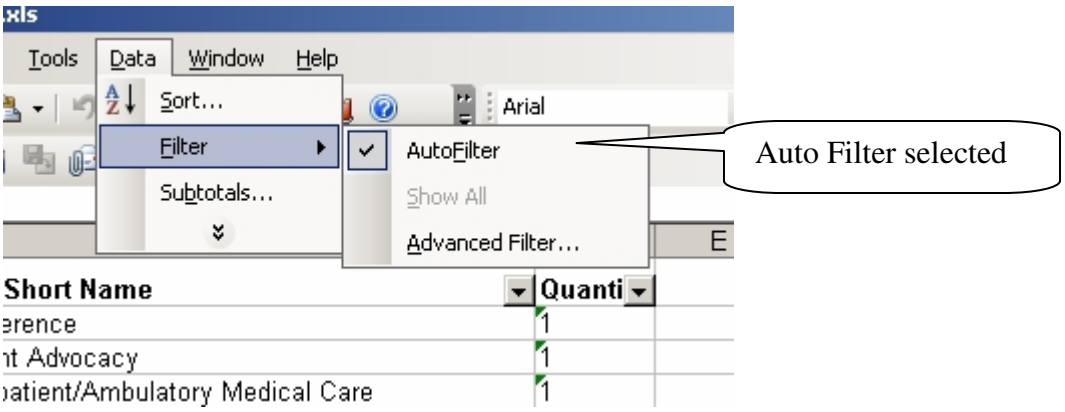
In your Excel file, align the cursor on the vertical bar between the letters A and B. Note how the cursor changes shape to a vertical black bar with a horizontal arrow crossing it.



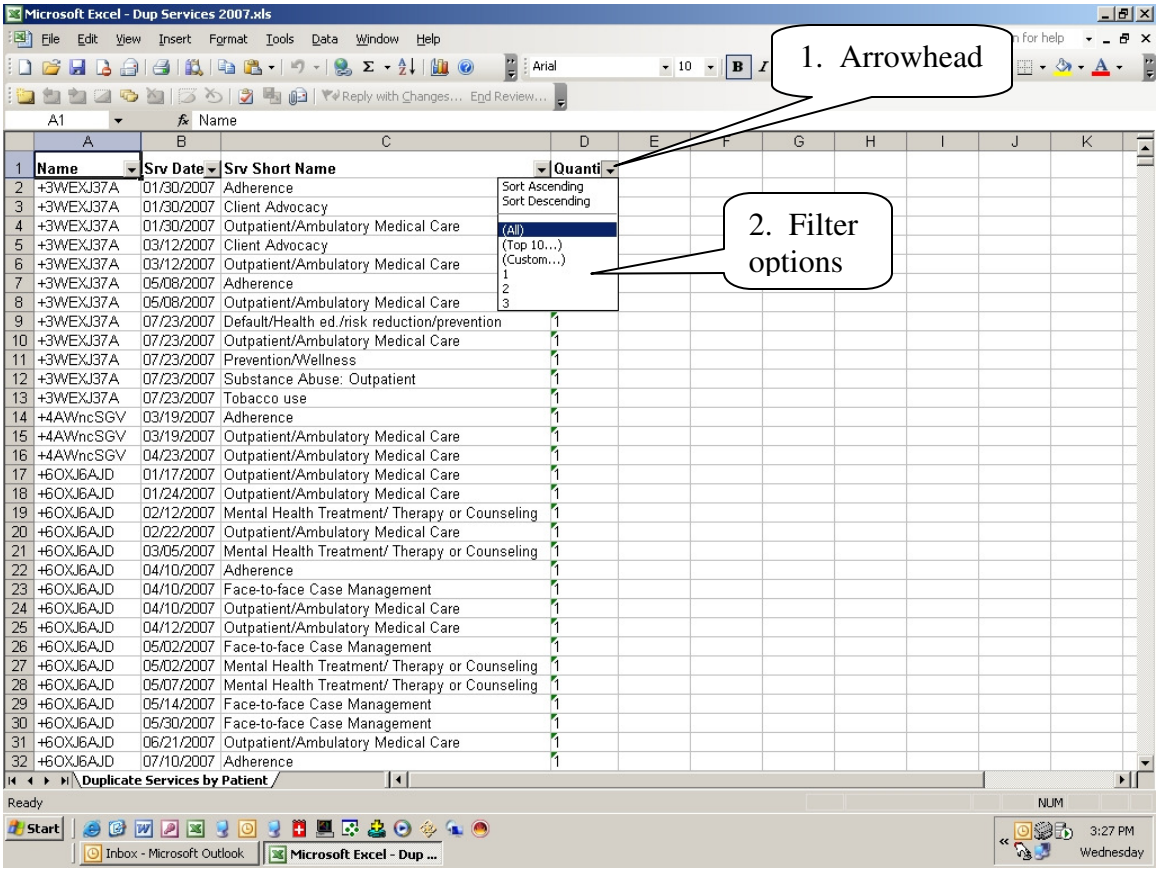
Double-click the left mouse button. Notice how the column width changes to let you see the entries in that column. You may also drag the cursor to the right as needed. Repeat the process for each column with data until you can see your data clearly.

Click on the word “Data” in the top menu. You can see it in the image below.
Slide the cursor down to the word “Filter” that appears in the pull-down menu.
Click on the “Auto Filter” option in the pop-up that appears to the right. See smaller image below for detail.
Each column will show a pull-down arrow as shown below.





This image shows what happens when I click on the arrowhead (1) in the Quantity column. Select 2 inside the filter options pop-up (2) using the left mouse button.



Name	Srv Date	Srv Short Name	Quanti
+3WEXJ37A	01/30/2007	Adherence	
+3WEXJ37A	01/30/2007	Client Advocacy	
+3WEXJ37A	01/30/2007	Outpatient/Ambulatory Medical Care	
+3WEXJ37A	03/12/2007	Client Advocacy	
+3WEXJ37A	03/12/2007	Outpatient/Ambulatory Medical Care	
+3WEXJ37A	05/08/2007	Adherence	
+3WEXJ37A	05/08/2007	Outpatient/Ambulatory Medical Care	
+3WEXJ37A	07/23/2007	Default/Health ed./risk reduction/prevention	1
+3WEXJ37A	07/23/2007	Outpatient/Ambulatory Medical Care	1
+3WEXJ37A	07/23/2007	Prevention/Wellness	1
+3WEXJ37A	07/23/2007	Substance Abuse: Outpatient	1
+3WEXJ37A	07/23/2007	Tobacco use	1
+4AWncSGV	03/19/2007	Adherence	1
+4AWncSGV	03/19/2007	Outpatient/Ambulatory Medical Care	1
+4AWncSGV	04/23/2007	Outpatient/Ambulatory Medical Care	1
+6OXJ6AJD	01/17/2007	Outpatient/Ambulatory Medical Care	1
+6OXJ6AJD	01/24/2007	Outpatient/Ambulatory Medical Care	1
+6OXJ6AJD	02/12/2007	Mental Health Treatment/ Therapy or Counseling	1
+6OXJ6AJD	02/22/2007	Outpatient/Ambulatory Medical Care	1
+6OXJ6AJD	03/05/2007	Mental Health Treatment/ Therapy or Counseling	1
+6OXJ6AJD	04/10/2007	Adherence	1
+6OXJ6AJD	04/10/2007	Face-to-face Case Management	1
+6OXJ6AJD	04/10/2007	Outpatient/Ambulatory Medical Care	1
+6OXJ6AJD	04/12/2007	Outpatient/Ambulatory Medical Care	1
+6OXJ6AJD	05/02/2007	Face-to-face Case Management	1
+6OXJ6AJD	05/02/2007	Mental Health Treatment/ Therapy or Counseling	1
+6OXJ6AJD	05/07/2007	Mental Health Treatment/ Therapy or Counseling	1
+6OXJ6AJD	05/14/2007	Face-to-face Case Management	1
+6OXJ6AJD	05/30/2007	Face-to-face Case Management	1
+6OXJ6AJD	06/21/2007	Outpatient/Ambulatory Medical Care	1
+6OXJ6AJD	07/10/2007	Adherence	1

This image shows the filtered results.

Microsoft Excel - Dup Services 2007.xls

	Name	Srv Date	Srv Short Name	Quanti
197	+N++FHsSV	01/31/2007	Outpatient/Ambulatory Medical Care	2
224	+N++FHsSV	07/30/2007	Other Case Management (non face-to-face)	2
255	+q+ZL3ZgS	03/29/2007	Default/Transportation Services	2
405	0cT42UA5J	01/24/2007	Outpatient/Ambulatory Medical Care	2
737	2H4up6uke	03/20/2007	Other Case Management (non face-to-face)	2
1209	5qFn8Oqon	08/16/2007	Outpatient/Ambulatory Medical Care	2
1231	5uuh7H6+F	01/17/2007	Outpatient/Ambulatory Medical Care	2
1253	5yjpU2RM+	03/07/2007	Outpatient/Ambulatory Medical Care	2
1435	7OAkxBWlN	04/24/2007	Outpatient/Ambulatory Medical Care	2
1606	8VYWHV6Zz	06/01/2007	Default/Transportation Services	2
1748	9kawsxgwE	02/23/2007	Outpatient/Ambulatory Medical Care	2
1861	9QmEKwdMk	03/26/2007	Face-to-face Case Management	2
2046	Ac4WlwMzq	03/20/2007	Outpatient/Ambulatory Medical Care	2
2247	Aok9Dkqdy	05/30/2007	Outpatient/Ambulatory Medical Care	2
2523	bg9lfVZ3g	02/21/2007	Default/Transportation Services	2
2857	cc0sXDA++	01/03/2007	Outpatient/Ambulatory Medical Care	2
2867	cC2vgm8RF	04/11/2007	Outpatient/Ambulatory Medical Care	2
3257	dkIEGps+V	01/12/2007	Face-to-face Case Management	2
3505	E1R2tbScz	07/30/2007	Prescriptions	2
3614	ecg1sW+6E	01/10/2007	Outpatient/Ambulatory Medical Care	2
3677	eEA7RczR2	06/27/2007	Outpatient/Ambulatory Medical Care	2
3853	eUicnaogS	02/06/2007	Outpatient/Ambulatory Medical Care	2
4262	FUu4Ekk+D	06/08/2007	Outpatient/Ambulatory Medical Care	2
4349	g46zl4Y2Q	07/30/2007	Outpatient/Ambulatory Medical Care	2
4402	GciA8JXoU	07/11/2007	Diagnostic	2
4467	GHogltp44	08/22/2007	Outpatient/Ambulatory Medical Care	2
5276	IEjTd6Twu	07/27/2007	Outpatient/Ambulatory Medical Care	2
5389	ITs49Wxpx	03/02/2007	Face-to-face Case Management	2
5396	ITs49Wxpx	03/05/2007	Face-to-face Case Management	2
5408	ITs49Wxpx	03/16/2007	Face-to-face Case Management	2
5413	ITs49Wxpx	03/23/2007	Face-to-face Case Management	2

Please note:

<u>The filter only limits what you can see. The rest of the data is still in the file!</u>

To prove my point: Click on the Quantity pull-down arrow.
Select "All" as shown in the Filter Options box in the previous image.
Your data reappears intact.

Set your filter again using the steps outlined previously.

You may also set filters for the other columns to reduce the data stack even more.

Make sure to save your file with the changes.

You may print the filtered list to show the 68 duplicated entries.

While this list may seem large, it's very small in comparison to the thousands of entries created in the report. This provides enough information to manually review the data in CAREWare and validate the services given.