

OASIS Alert

Can't Download Tally Reports? Hang On, The End Is In Sight

If you think you're the only one who can't access and download the Excel patient tally reports from the **Centers for Medicare & Medicaid Services'** Web site, think again.

Home health agencies - large and small - express frustration with a tool that promised to make it easier to use patient tally reports in quality improvement efforts.

Agencies expected to use the patient tally report in outcome-based quality improvement as they chose patients to include in process-of-care investigations. The report is a spreadsheet containing patient-specific OASIS data the agency has submitted. The data can be selected to correspond with the time period for the risk-adjusted outcome report you are using and to include patients with your target outcome, explains **Rachel Hammon** with the **Texas Association for Home Care** in Austin.

The directions about how to download the Excel reports "seem confusing," Hammon reports. One of the most difficult parts of the process is to choose the correct information to include so you select the patients you want on your report and exclude the ones you don't, she says.

And then you have to retrieve the report and download it, which is no easy task, agencies report. "We have not been able to download it," says **Linda Watts** with Birmingham, AL-based **Alacare Home Health and Hospice**. Smaller agencies - which have fewer patients on their reports - may be able to, she speculates.

If you manage to download, don't try to print it until you run the query reports, warns consultant **Marion Donahue** with **Simione Consultants** in Hamden, CT. This process breaks the huge report into more manageable sections. Dial-up connections seem to cause more of a problem than broadband, experts agree.

"We've had no problems downloading the tally report," says **Lynne Bekeart** with **CMRI**, the San Francisco-based California QIO. CMRI helps California agencies download tally reports. Some agencies are trying to download in Microsoft Word, rather than Excel, she reports. Also, CMRI has found the CMS instructions aren't very helpful for agencies, so the QIO created its own step-by-step instructions for using the tally sheet tool (e-mail marianc@eliresearch.com for a copy).

"I have not personally heard much from agencies on this topic," says **David Hittle** from the Denver-based **University of Colorado's Center for Health Services Research**, CMS' OASIS contractor. "I know that download time is a major issue for some agencies, particularly the larger ones," he tells **Eli**.

An agency with 200 patients would generate a spreadsheet case mix tally report of 400 KB, with the corresponding outcome tally report of 160 KB Hittle explains. Once you get larger than that, it may be difficult to maintain a modem connection with the state OASIS system long enough to download the report, he speculates. "CMS is considering different options to address the problem," he adds.

A CMS spokesperson agrees that accessing and printing these reports is a challenge for many agencies, especially when the reports are very large. Another CMS contractor, the **Iowa Foundation for Medical Care**, "is actively investigating a solution for this situation," the spokesperson says. IFMC is designing a method to make the reports smaller, using a date criteria filter to allow the report to be accessed one month at a time - making them one-twelfth the size of the full report. "IFMC will release this filter by the end of the year," the spokesperson tells **Eli**.

Editor's Note: Marion Donahue will be presenting an **Eli**-sponsored teleconference on "Public Reporting for Home Health Agencies: Prepare To Compare" on Sept.9. Information is at <http://codinginstitute.com/conference/conference.cgi>.

