

New York State Department of Health
Medicaid Perinatal Care Quality Improvement Project

**Instruction Module 2: Complete Excel Data Entry Forms and
Send Data to Your Computer Desktop**

*Submitting medical record reviews to the NYSDOH is a three-step process,
with an instruction module for each step of the process.*

- Module 1:** Login to the Prenatal Portal and Download Excel Data Entry Forms
- Module 2:** Complete Excel Data Entry Forms and Send Data to Your Computer Desktop
- Module 3:** Return Excel Data to the Prenatal Portal

Module 1 provides detailed instruction for creating a Portal Password, downloading your practice medical record review data entry forms, and viewing your practice sample.

Module 2 provides instruction on using the Excel Data Entry Forms to enter medical record review information, and sending that information to your computer desktop when done (Export Data).

Module 3 directs users in sending the medical record review data from their computer desktop to the Prenatal Portal (Upload Data), and confirming the submission was successful.



Instruction Module 2: Complete Excel Data Entry Forms and Send Data to Your Computer Desktop

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Getting Help

You can Submit a Request for assistance in using either the Prenatal Portal or the Excel Data Entry Forms.

1. Go to the Prenatal Portal at <http://prenatal.ipro.org> and Submit a Request from the Login page, or any Prenatal Portal page.
2. OR send an email directly to prenatal@support.ipro.us.
3. You will receive an email confirmation your request has been received. IPRO Health Informatics personnel endeavor to respond to all questions by telephone (if requested) or email within two business days.

For detailed direction on Submitting a Request, please refer to Module 1: Login to the Prenatal Portal and Download Excel Data Entry Forms, page 3.



Using the Excel Data Entry Forms

Download and Open the Excel Data Entry Forms

1. Download your practice Excel Data Entry Forms from the Prenatal Portal.
2. Enable Macros by clicking on “Options” in the upper left-hand corner of the Excel front page.
3. Open a form by selecting Enter Data on a row with a patient name.
4. (Selecting Print Preview will allow you to print that patient’s record).

*For detailed direction on downloading and opening Excel Data Entry Forms, please refer to
Module 1: Login to the Prenatal Portal and Download Excel Data Entry Forms,
pages 6-8.*

Medicaid Perinatal Care Quality Improvement Project

Patient Sample
Provider: LUTHERAN MEDICAL CENTER

Print Patient List Send Completed Forms to Desktop

Patient Name	Date of Birth	Medicaid ID	Date Added	Status	Enter Data	Print Preview	Date Updated	Percent Data Complete
A L	1981-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%
M H	1973-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%
M Z	1986-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%
M S	1977-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%
J S	1980-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%
H S	1991-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%
R A	1968-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%
T R	1988-01-01	ZZ99999Z	12/12/2016	INCOMPLETE	Enter Data	Print Preview		0.00%

When the Excel Data Entry Form file is open,
no other Excel files can be opened on your computer.

Using the Excel Data Entry Forms

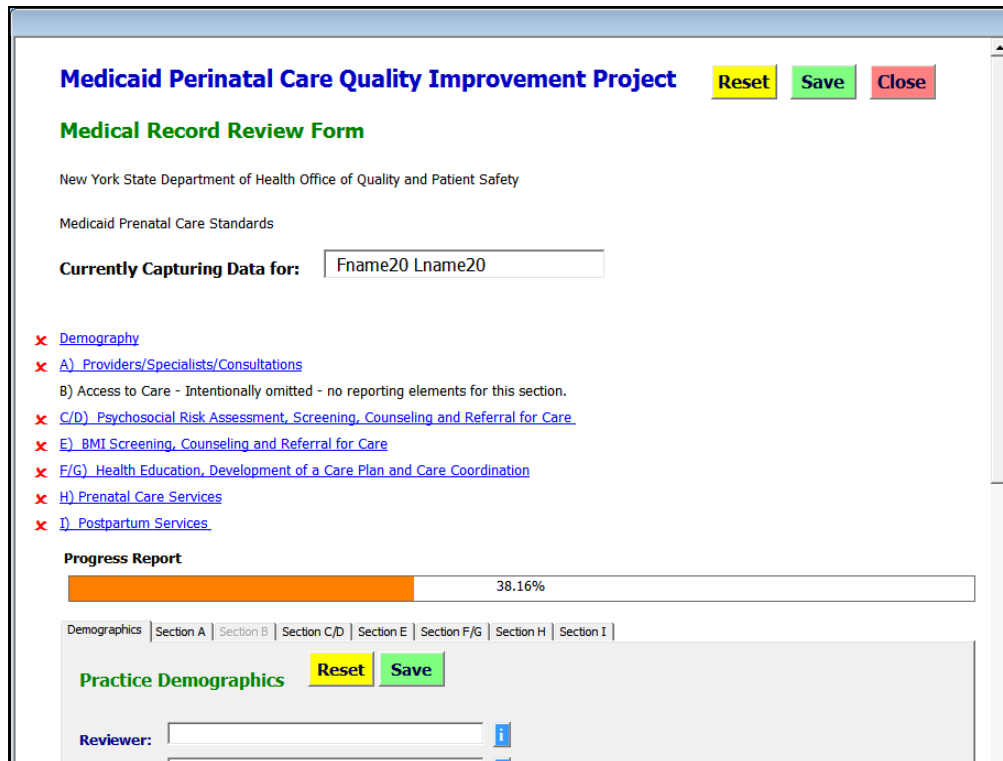
Navigate a Patient Record

*Each patient record is comprised of 7 pages,
corresponding to Sections of the NYSDOH Medicaid Prenatal Care Standards
(available at www.health.ny.gov/health_care/medicaid/standards/prenatal_care/).*

Move between and open the various pages of the patient record by 1 of 2 options:

1. Select a Section Title at the top of the page OR
2. Select the corresponding Tab at the top of the page (Section A through I).

You are not automatically advanced to the next page after completing and saving a page.



Medicaid Perinatal Care Quality Improvement Project Reset Save Close

Medical Record Review Form

New York State Department of Health Office of Quality and Patient Safety

Medicaid Prenatal Care Standards

Currently Capturing Data for:

- × [Demography](#)
- × [A\) Providers/Specialists/Consultations](#)
B) Access to Care - Intentionally omitted - no reporting elements for this section.
- × [C/D\) Psychosocial Risk Assessment, Screening, Counseling and Referral for Care](#)
- × [E\) BMI Screening, Counseling and Referral for Care](#)
- × [F/G\) Health Education, Development of a Care Plan and Care Coordination](#)
- × [H\) Prenatal Care Services](#)
- × [I\) Postpartum Services](#)

Progress Report

Demographics | **Section A** | Section B | Section C/D | Section E | Section F/G | Section H | Section I

Practice Demographics Reset Save

Reviewer:

If the data entry form appears larger than the screen or sentences on the page appear cut off,
check the Windows Control Panel Display settings.

Click on the Start button in the lower left-hand corner of the screen.

Select Control Panel. Select (Appearance and Personalization) and Display.

Select Small (100%). The setting is not applied until the computer is restarted.



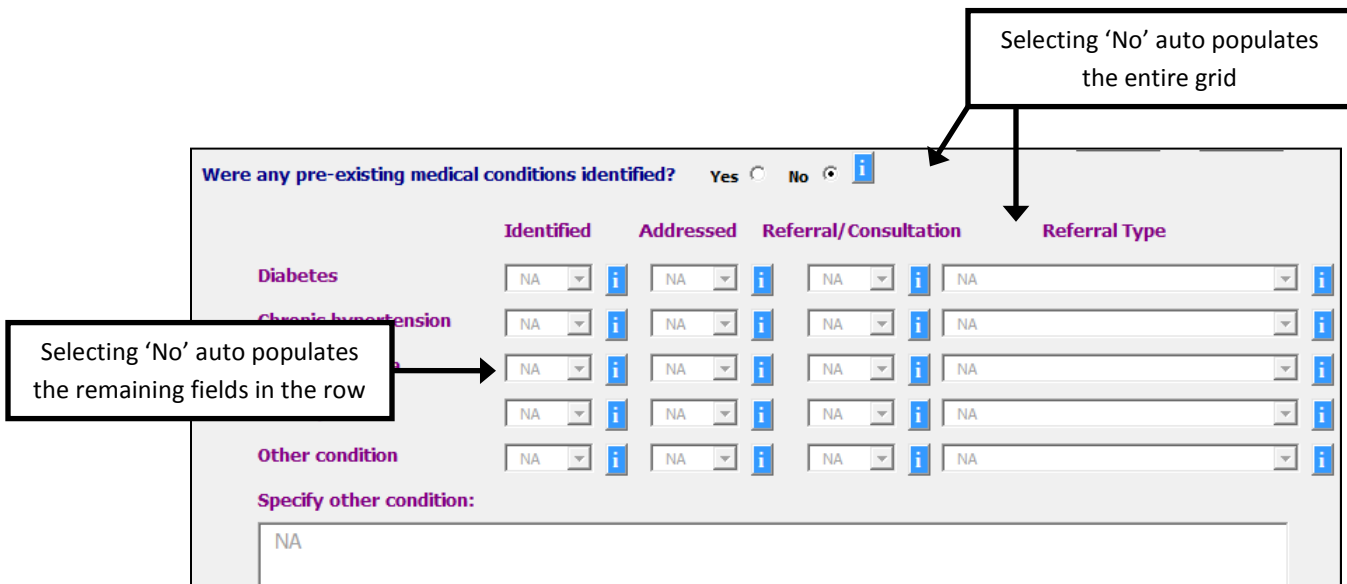
Using the Excel Data Entry Forms Data Entry Shortcuts

*Several functions are incorporated in the forms to simplify data entry
and ensure data consistency and completeness.*

Tab – The tab key moves you from field to field throughout the page.

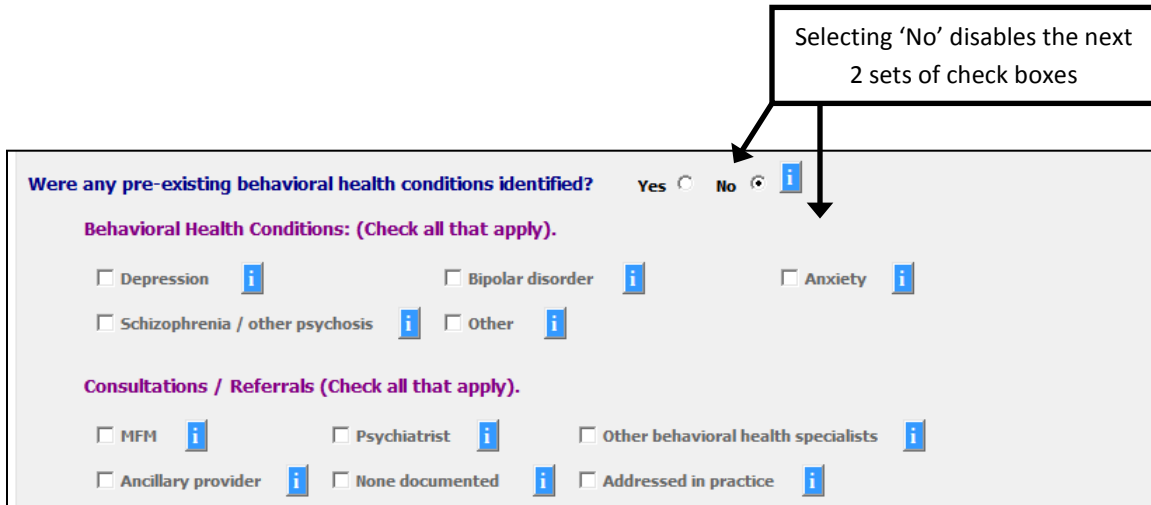
Cursor – Placing the cursor in a blank field displays a list of accepted values to select from.

Auto population – Many fields are auto populated based on previous responses throughout a patient record. Frequently, selecting a No 'radio button' will result in substantial auto population.



Were any pre-existing medical conditions identified? Yes No [i](#)

	Identified	Addressed	Referral/Consultation	Referral Type
Diabetes	NA i	NA i	NA i	NA i
Chronic hypertension	NA i	NA i	NA i	NA i
	NA i	NA i	NA i	NA i
	NA i	NA i	NA i	NA i
Other condition	NA i	NA i	NA i	NA i
Specify other condition:	NA			



Were any pre-existing behavioral health conditions identified? Yes No [i](#)

Behavioral Health Conditions: (Check all that apply).

Depression [i](#) Bipolar disorder [i](#) Anxiety [i](#)

Schizophrenia / other psychosis [i](#) Other [i](#)

Consultations / Referrals (Check all that apply).

MFM [i](#) Psychiatrist [i](#) Other behavioral health specialists [i](#)

Ancillary provider [i](#) None documented [i](#) Addressed in practice [i](#)

Using the Excel Data Entry Forms

Save Data

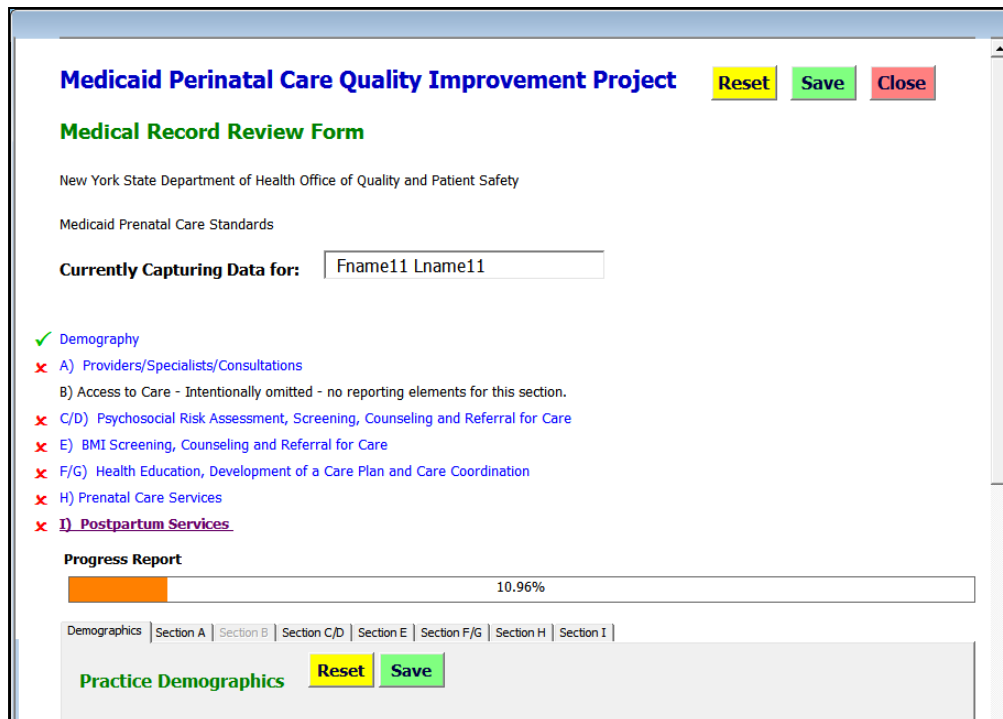
Save medical record review data by 1 of 2 options:

1. Save a section (page) at a time by selecting the Save button in each section OR
2. Save the whole record by selecting the Save button in the upper right-hand corner of the screen.
3. When you select Close, you are taken to the front page of the Forms file, where you can opt to enter data in another patient record.
4. When closing the Excel Data Entry Forms file, be sure to respond Yes to the standard Microsoft Office Excel prompt, asking if you want to save changes.

View Progress

Progress toward completion of a medical record review is displayed several ways:

1. When a section is complete, the red **x** next to the section name is converted to a green **v**.
2. The proportion of the patient record completed is displayed on the orange Progress Report bar.
3. The proportion of each patient record completed is displayed on the front page of the Forms.



Medicaid Perinatal Care Quality Improvement Project Reset Save Close

Medical Record Review Form

New York State Department of Health Office of Quality and Patient Safety

Medicaid Prenatal Care Standards

Currently Capturing Data for:

✓ Demography

✗ A) Providers/Specialists/Consultations

B) Access to Care - Intentionally omitted - no reporting elements for this section.

✗ C/D) Psychosocial Risk Assessment, Screening, Counseling and Referral for Care

✗ E) BMI Screening, Counseling and Referral for Care

✗ F/G) Health Education, Development of a Care Plan and Care Coordination

✗ H) Prenatal Care Services

✗ I) Postpartum Services

Progress Report

10.96%

Demographics | Section A | Section B | Section C/D | Section E | Section F/G | Section H | Section I

Practice Demographics Reset Save

Progress toward data entry completion is updated only after one of the Save buttons is selected.

Only data from 100% complete forms will be sent to your desktop and uploaded to the Prenatal Portal.

Send Completed Excel Form Data to Your Computer Desktop

Export Data

1. Complete data entry for some, or all, of the medical record reviews required from your practice.
2. On the Excel front page, click the Send Completed Forms to Desktop button.
3. While the Export is in progress, you will see the word “Processing” next to the button.
4. In a few seconds a dialog box will appear which states “Data have been exported as a CSV file.”
Click OK.
5. “Export Complete” will be displayed next to the Send Completed Forms to Desktop button.
6. You will be able to see the CSV file with the naming convention ID_Date_Prenatal_Upload on your computer desktop.

Print Patient List		Send Completed Forms to Desktop		Processing...
view	Date Updated	Percent Data Complete		
view	1/20/2017	100%		
view	1/24/2017	100%		
view	1/20/2017	100%		

Print Patient List		Send Completed Forms to Desktop		Export Complete
view	Date Updated	Percent Data Complete		
view	1/20/2017	100%		
view	1/24/2017	100%		
view	1/20/2017	100%		

Considerations when Exporting and Uploading Data to the Prenatal Portal

- You can export data to your desktop when you have completed all items in one or more forms. You do not have to perform this step every time you complete a form; however frequent exporting and uploading of data to the Prenatal Portal is encouraged to both back up your data, and allow the NYSDOH to monitor progress.
- If you should export and upload a file containing a completed record more than once, the earlier record will be overwritten. This is not a problem if the data has not changed. Plus resubmitting and overwriting provides an opportunity for you to change the data in a record.
- Multiple reviewers from a practice may send files containing any number of completed records to their computer desktop and return them to the Portal.
- Files from your practice will be combined, and the number of completed records tallied, as they are received at the Prenatal Portal.
- **Only the data from 100% complete forms are sent to your desktop and uploaded to the Prenatal Portal.**

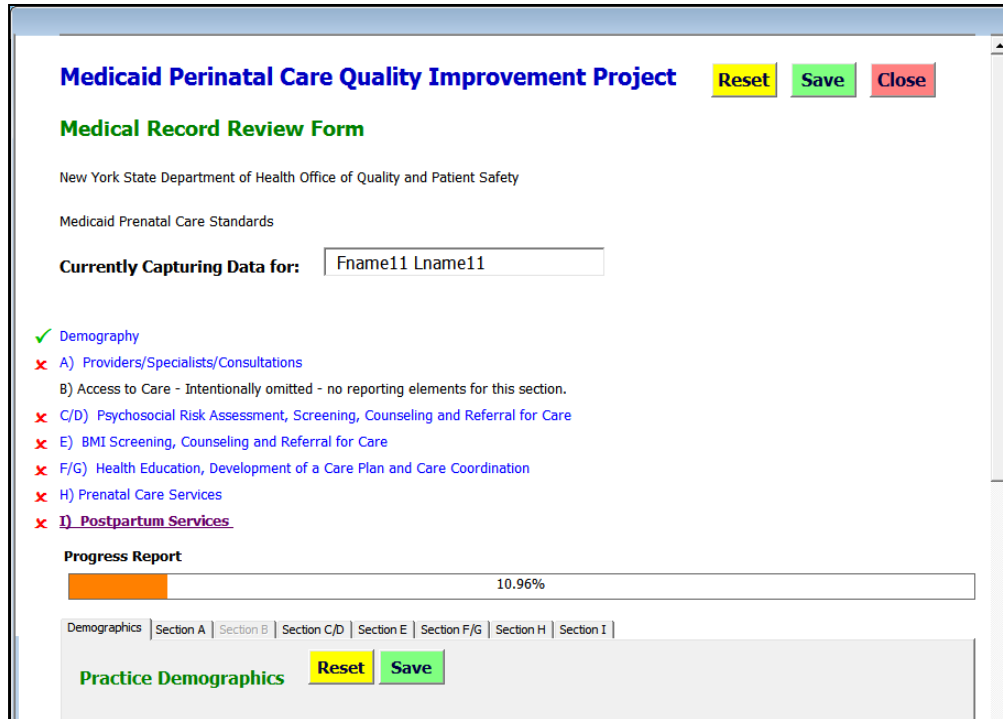
For guidance returning the CSV file to the Prenatal Portal, see Module 3: Return Excel Data to the Prenatal Portal.

Additional Features

Clear Data (Reset)

If you find you have entered data in the wrong page or record, and want to delete the data:

1. Select the Reset button at the top of a Section to clear the fields on that page only.
2. Select the Reset button at the top of the Form to clear all fields in the record.



Medicaid Perinatal Care Quality Improvement Project Reset Save Close

Medical Record Review Form

New York State Department of Health Office of Quality and Patient Safety

Medicaid Prenatal Care Standards

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- ✗ H) Prenatal Care Services
- ✗ I) Postpartum Services

Progress Report

Demographics | Section A | Section B | Section C/D | Section E | Section F/G | Section H | Section I |

Practice Demographics Reset Save