

## **Revised Patient Tally Report Workbook with Data Filtering Tools (October 2006)**

A revised spreadsheet tool is now available for home health agency users to explore the data in their patient tally reports using Branch report information. The tool consists of a Microsoft Excel workbook which includes automated procedures for importing case mix and outcome tally reports downloaded (from CASPER) in spreadsheet format, designating where the patient received care (Branch or Parent), and selecting cases according to user-specified outcome and case mix criteria. It is designed to assist home health agency staff to use the patient tally reports for outcome-based quality improvement purposes, by enabling them to focus on where patients received their care, as well as their specific attributes and outcomes and avoid manual review of lengthy printed reports.

Click the link that follows to download the revised tally report workbook with data filtering tools, combined with user documentation in a single ZIP file.

This version addresses a recent change in the OBQI reporting system, the inclusion of Branch ID information. In September 2006 a pilot program involving two states tested OBQI Reporting that allowed for the creation of specific Branch reports began. After the completion of this pilot test, the option for Branch-specific reports will be made available to all home health agencies. As a result of this change in reporting, two additional fields were added to the Patient Tally report that provided information about where the patient began and ended care, i.e., "SOC Branch ID" and "EOC Branch ID". This revised Patient Tally Report with Data Filtering Tools makes use of this information to provide home health agencies more precision in analyzing Patient Tally data.



The revised Patient Tally Report template and Instruction Manual are in a ZIP file and can be downloaded here @

[http://www.cms.hhs.gov/HomeHealthQualityInits/16\\_HHQIOASISOBQI.asp](http://www.cms.hhs.gov/HomeHealthQualityInits/16_HHQIOASISOBQI.asp)

Home Health agencies needing assistance with the filter may contact their local Quality Improvement Organization.