

PhAIS - Physician Activity Information System Outlook Calendar Data Download

Monthly tasks items 1-5

(Training is strongly recommended – the notes are for reminder only)

1. Computer configuration & Login

The PhAIS application and live data reside on Valeries computer (in folder **C:\Phais 4**).The data accumulates each month in order to perform annual statistics.

Computer Login: **svcphais**

Password :(ask Helen or Valerie)

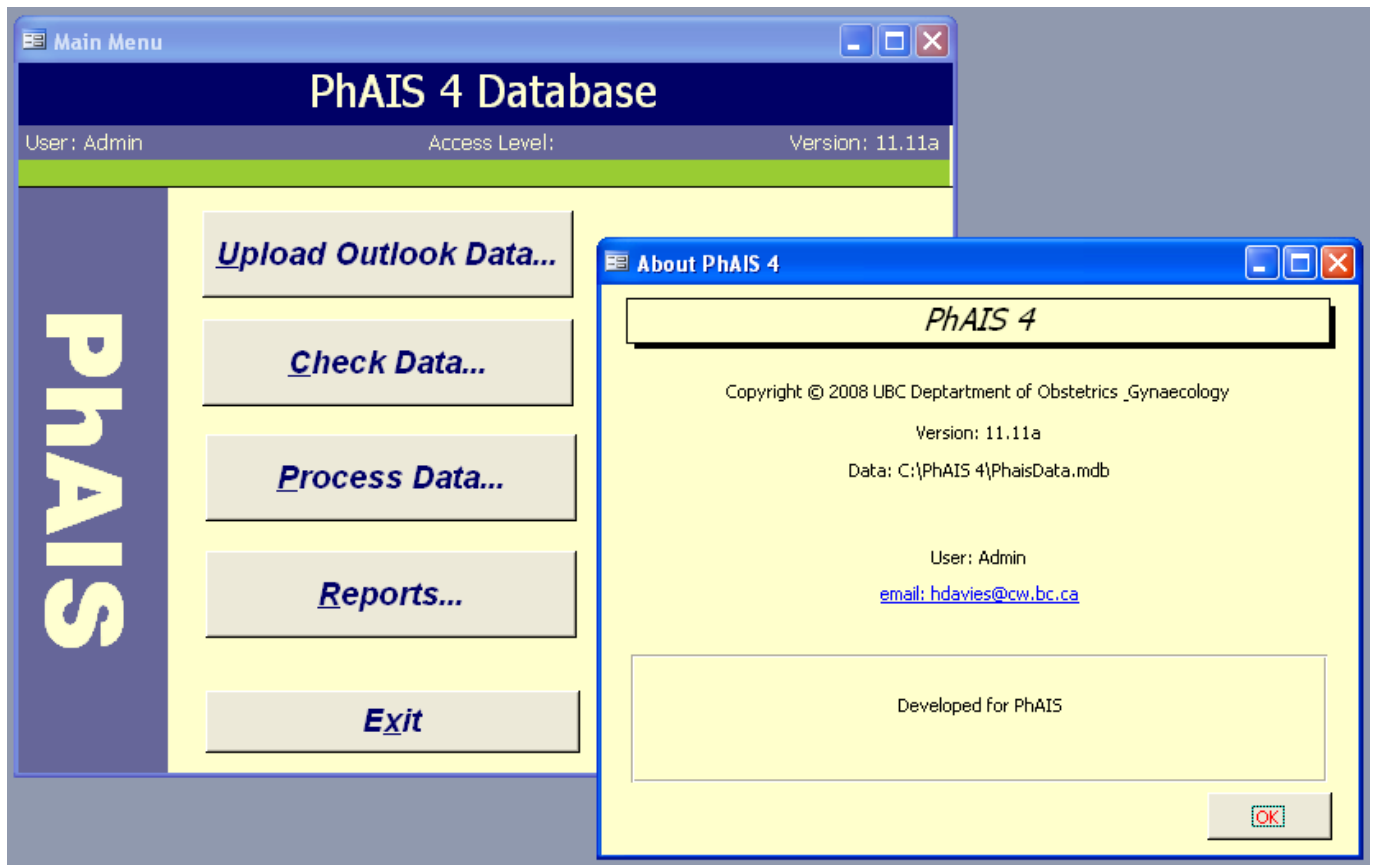
We can access every PHSA Calendar only by using this superuser login.

The application is an MS Access database (**PhaisDatabase.mdb**) which is attached to a separate MS Access datafile (**PhaisData.mdb**).

To run: double-click **C:\Phais 4\PhaisDatabase.mdb**

The Main Menu appears with useful functions **File & Help** on Top Toolbar

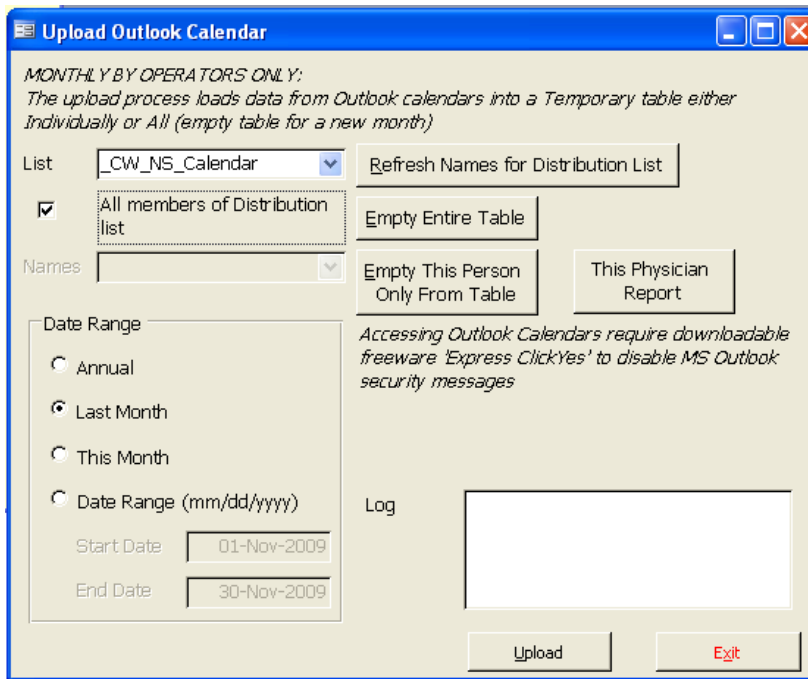
Help -> About shows which application version is running and the name of the attached datafile



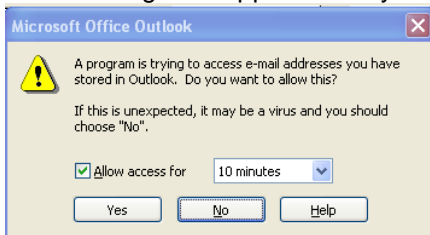
2. Upload Outlook Data

The upload imports data to a temporary table before appending to the live data in 'Process Data'.

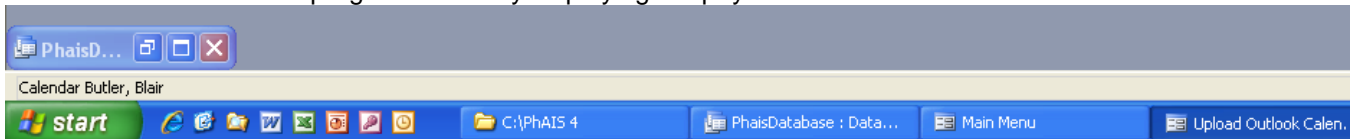
- **Step 1 – 'Refresh Names for Distribution List'** – re-read the definitive list '_CW_NS_Calendar'
- **Step 2 –** To run for all members - Check the '**All members**' box
- **Step 3 –** click '**Empty Entire Table**'
- **Step 4 –** Date Range almost always = '**Last Month**'
- **Step 5 –** Click '**Upload**' – progress can be tracked in the status bar – **wait 1-2 hours**
- (Step 6 – usually not needed unless errors – to repeat a single physician – unclick 'All members', pick physician from 'Names', 'Empty This Person' – Click 'Upload' for the single physician)



This message will appear initially and receives an automatic 'Yes' from the **ClickYes** program installed.



The status bar shows the progress made by displaying the physician name.

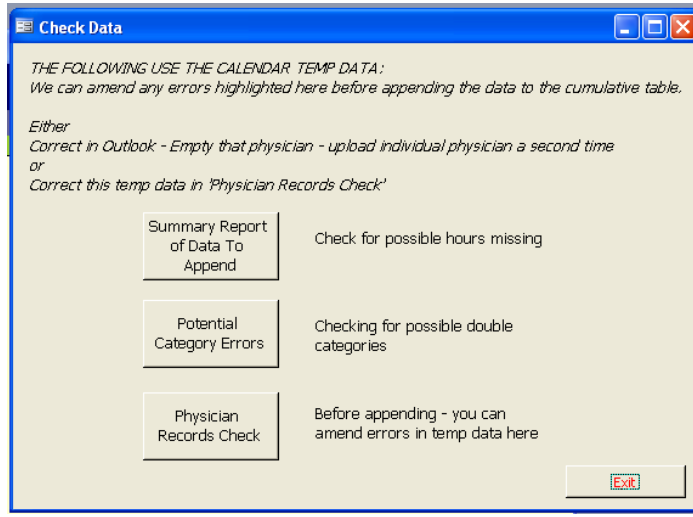


Occasionally the network errors and affects the download and a second attempt may just work without any need for help from IT support.

Error messages may appear in the 'Log' – to check a physicians data downloaded successfully unclick 'All members', pick physician from 'Names', click 'This Physician Report' – this should list Outlook calendar entries. If there are none carry out Step 6 above.

Finally '**Exit**'

3. Check Data



Summary Report of Data To Append shows a total of the hours counted for all activities by physician. Check that this gives the hours you would expect from each physician. Any count of zero would be probably down to an error during upload (for this step 6 above could be followed).

CalendarData To Append

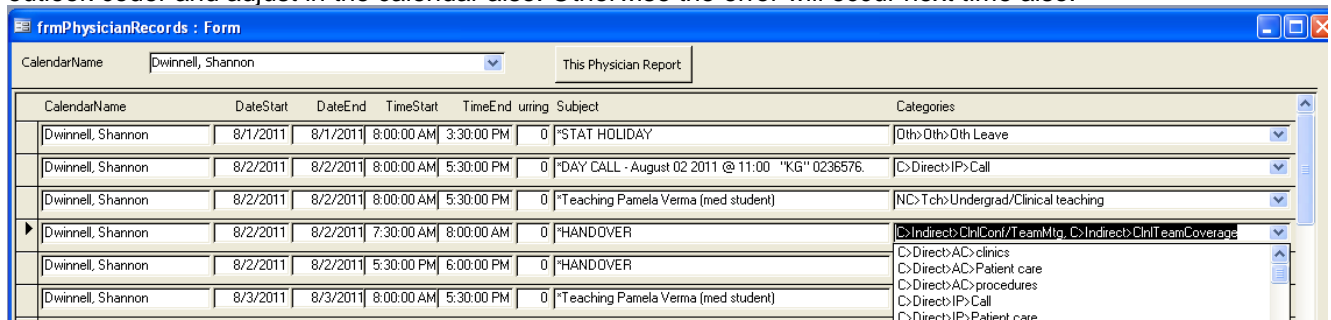
<i>CalendarName</i>	<i>Time Spent</i>
Butler, Blair	353.5
Conlon, Maureen	146
Dahlgren, Leanne	60
Delisle, Marie-France	135
Duinnell, Shannon	290.5

Multiple Category Errors can be entered accidentally, only the first identifiable PhAIS category is accepted. You can see how the conflicts have been resolved below. These can be adjusted in 'Physician Records Check' below. (The Minor Errors are for information only.)

Potential Category Errors

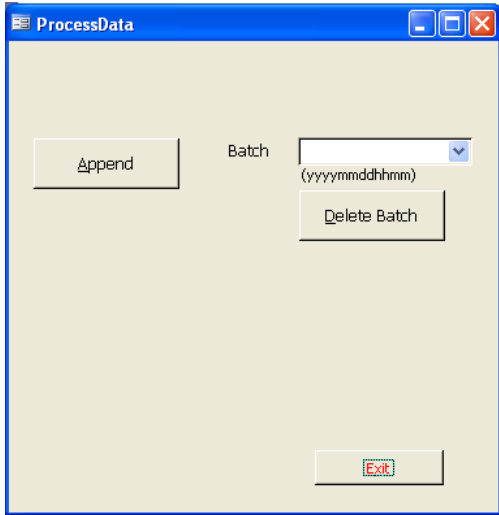
<i>Calendar Name</i>	<i>Date Start</i>	<i>Date End</i>	<i>Time Start</i>	<i>Time End</i>	<i>Is Rec</i>	<i>Subject</i>	<i>Categories</i>
Multiple Categories Error							
Duinnell, Shannon	8/2/2011	8/2/2011	7:30:00 AM	8:00:00 AM	0	*HANDOVER	C> Indirect> Clnl Conf/TeamMtg, C> Indirect> Clnl TeamCoverage <i>Uploaded as:</i> C> Indirect> Clnl Conf/TeamMtg
Minor Outlook Errors							
Gagnon, Alain	8/19/2011	8/19/2011	9:00:00 AM	5:00:00 PM	0	*PHSA TIME	Personal, NC> Admin> Hospital busin <i>Uploaded as:</i> NC> Admin> Hospital business
Gagnon, Alain	8/20/2011	8/21/2011	8:00:00 AM	7:30:00 AM	0	*Weekend Call	Birthday, C> Direct> IP> Call <i>Uploaded as:</i> C> Direct> IP> Call

Physician Records Check – allows the Category to be adjusted. If it is a recurring event the contact the outlook coder and adjust in the calendar also. Otherwise the error will occur next time also.

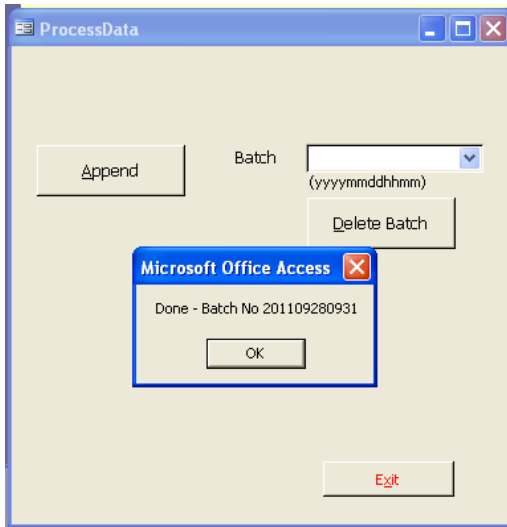


4. Process Data

Summary Report of Data To Append shows a total of the hours counted for all activities by physician. Check that this gives the hours you would expect from each physician. Any count of zero would be probably down to an error during upload (for this step 6 above could be followed).



Click '**Append**' this adds the temp data table for this month to the historical data. It is given a unique batch number (yyyymmddhhmm) & it is possible (but unusual) to delete if necessary.



Finally '**Exit**'

The data should now be ready for reporting.

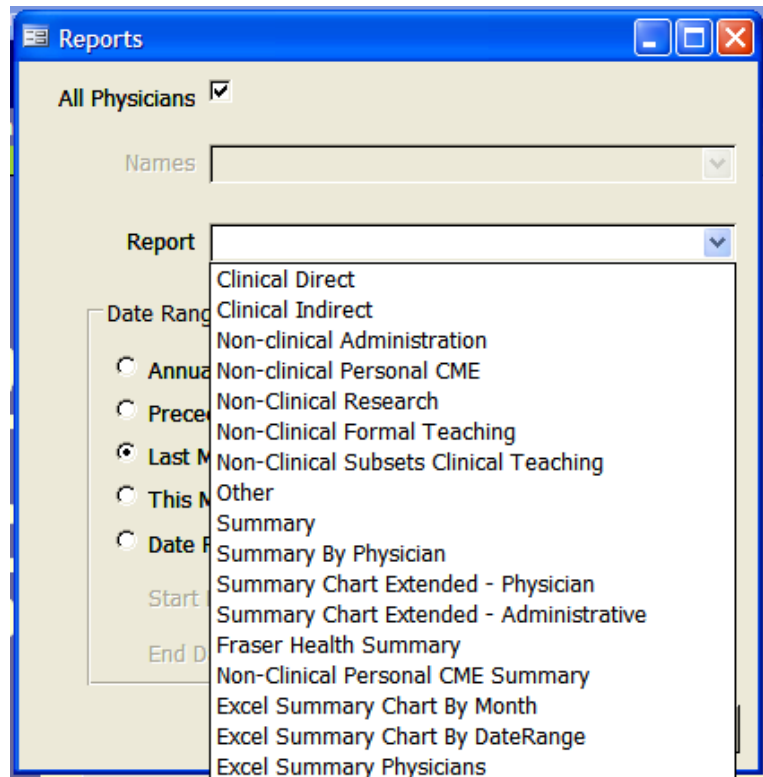
5. Reports

Physicians require a monthly summary of time spent on the various activities.

Select the required **Date Range** (default always Last Month). NB if you do reports BEFORE the month has ended then you will need to click 'This Month'.

Print **Summary Chart Extended** report for **All Physicians** first. **Read** the data totals to ensure it looks plausible before printing individual breakdowns.

4.1 All Physicians Summary Reports for Last Month



All Reports will preview on screen, then click

top print icon.

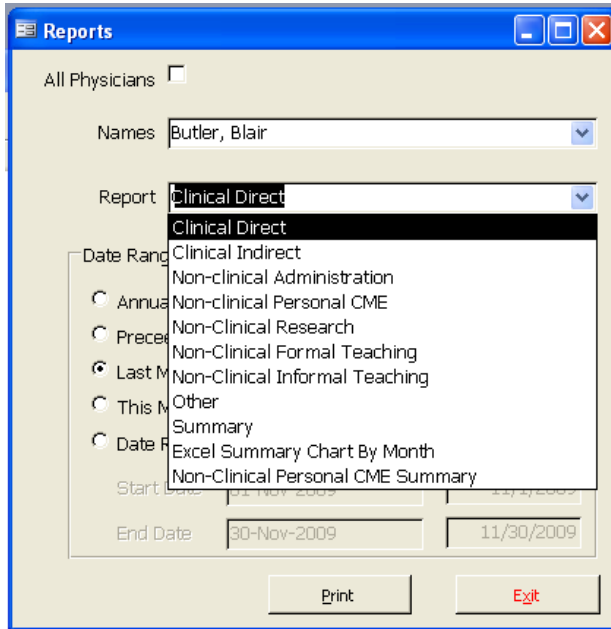
Click **All Physicians**

Required Reports for **Last Month** on paper:

- *Fraser Health Summary – NEW!*
- Summary Chart Extended – Physician
- Summary Chart Extended – Administrative
- Clinical Direct
- Clinical Indirect
- Non-Clinical Administration
- Non-Clinical Personal CME
- Non-Clinical Research
- Non-Clinical Formal Teaching
- Non-Clinical Informal Teaching
- Other
- Summary
- *Summary By Physician - NEW!*
- Non-Clinical Personal CME Summary (give to Chris)

4.2 Individual Physicians Reports for Last Month

Unclick **All Physicians** and select an individual **Name** and **Last Month** on paper



All Reports will preview on screen, then click top print icon.

Required Reports:

- **NONE** – available for individual reprints if required

4.3 All Physicians Excel Summary Reports for This Year To Date

Click **All Physicians** and select **Annual**. **Save** these to desktop & email to Maureen (examples section 6)

- Excel Summary Chart By Month
- Excel Summary Chart By Date Range
- Excel Summary Physicians (this takes a 10+ minutes) - An Excel spreadsheet will be created and formatted with one worksheet per physician.

NB if you do reports BEFORE the month has ended then you will need to click 'Date Range' & enter specific dates.

6. Data Backup

On completion the live data file (C:\Phais 4\PhaisData.mdb) should be copied to the shared folder V:\MFM Admin\PhAIS

This is simply a method of transporting data upstairs where monthly backups reside in V:\OBGYNIT\Phais 4\LiveDataBackups.

The latest version on the application (PhaisDatabase.mdb) can always be reinstalled from V:\OBGYNIT\Phais 4\Version nn – where nn is the largest (eg 11.00m).

7. Reports – Annual

An individual specific 'Date Range' can be reported on at any time – but Annual Reports should be run for the calendar year Jan – Dec.

Excel Summary By Date Range

Excel Summary (By Date Range)- Physician															
1/1/2009 to 12/31/2009															
Physician Name	Months		Indirect	Indirect %	Subtotal Clinical	Subtotal Clinical %	Administrative	Administrative %	Research %	Research %	Formal Teaching %	Formal Teaching %	Subtotal NonClinical	Subtotal NonClinical %	Clinical
	Direct	Direct %													
Butler, Blair	1637	56%	627.25	21%	2284.25	78%	351	12%	41	1%	264.5	9%	656.5	22	
Dahlgren, Leanne	1104	49%	520	23%	1624	72%	453.25	20%	86	4%	94.92	4%	634.17	28	
Delisle, Marie-France	1377.5	57%	607	23%	1984.5	83%	244.5	10%	47	2%	124.25	5%	415.75	17	
Gagnon, Alain	1017.25	38%	337	13%	1354.25	50%	1264.67	47%	13.5	1%	50.5	2%	1328.67	50	
Kent, Nancy	795	34%	347.5	15%	1142.5	49%	1026.67	44%	0		153.25	7%	1179.92	51	
Lalji, Sayrin	519	56%	245	26%	764	83%	122.25	13%	6	1%	33.42	4%	161.67	17	
Lim, Ken	1460.25	58%	495.17	20%	1955.42	77%	474.08	19%	61	2%	46.5	2%	581.58	23	
Liston, Robert	310	16%	41.5	2%	351.5	18%	1474.42	77%	18.83	1%	79.67	4%	1572.92	82	
Marquette, Gerald	1377	52%	545	20%	1922	72%	720.5	27%	0		29.5	1%	750	28	
Mayer, Chantal	1212	58%	602.67	29%	1814.67	87%	192.75	9%	2	0%	73.5	4%	268.25	13	
Pressey, Tracy	1023.5	60%	386.5	23%	1410	82%	246.75	14%	0		38	3%	304.75	18	
Shaw, Dorothy	0		0		0		0		0		0		0	0	
Skoll, Amanda	860.5	47%	332.25	18%	1192.75	65%	553.75	30%	8	0%	72.25	4%	634	35	
Tessier, Francine	1351.5	53%	642.5	25%	1994	78%	481	19%	12.5	0%	63	2%	556.5	22	
von Dadelnszen, Peter	669	35%	188.25	10%	857.25	45%	629.92	33%	382.5	20%	53	3%	1065.42	55	
GRAND TOTALS	14733.5	48%	5917.58	19%	20651.08	67%	8235.5	27%	678.33	2%	1196.25	4%	10110.08	33	

Excel Summary By Month

Excel Summary (By Month) - Physician															
1/1/2009 to 12/31/2009															
Physician Name	Months		Indirect	Indirect %	Subtotal Clinical	Subtotal Clinical %	Administrative	Administrative %	Research %	Research %	Formal Teaching %	Formal Teaching %	Subtotal NonClinical	Subtotal NonClinical %	Clinical
	Direct	Direct %													
January 2009 SUMMARY															
Butler, Blair	107	64%	34.5	21%	141.5	85%	25.5	15%	0		0		25.5	15%	50
Dahlgren, Leanne	123	54%	52.5	23%	175.5	77%	33.5	15%	16	7%	3	1%	52.5	23%	4
Delisle, Marie-France	139.5	56%	57.5	23%	197	78%	35.75	14%	2.5	1%	16	6%	54.25	22%	2
Gagnon, Alain	155	54%	44.75	16%	199.75	70%	84	29%	0		2.5	1%	86.5	30%	7
Kent, Nancy	67	28%	29.5	12%	96.5	41%	133.5	56%	0		7	3%	140.5	59%	4
Lalji, Sayrin	59.5	71%	22.5	27%	82	98%	2	2%	0		0		2	2%	1
Lim, Ken	132	60%	50	23%	182	83%	26	12%	6	3%	4.5	2%	36.5	17%	2
Liston, Robert	36	19%	6	3%	42	22%	151.58	78%	0.5	0%	0.5	0%	152.58	78%	
Marquette, Gerald	46.5	28%	60.5	37%	107	66%	56.25	34%	0		0		56.25	34%	
Mayer, Chantal	136.5	64%	68	32%	204.5	96%	9.5	4%	0		0		9.5	4%	10
Pressey, Tracy	0		0		0		0		0		0		0		
Shaw, Dorothy	0		0		0		0		0		0		0		
Skoll, Amanda	77	55%	33	24%	110	79%	23.25	17%	4	3%	2.5	2%	29.75	21%	
Tessier, Francine	129.5	48%	81.5	30%	211	78%	41	15%	0		17	6%	58	22%	2
von Dadelnszen, Peter	70	44%	18.5	12%	88.5	56%	41	26%	25.5	16%	3	2%	69.5	44%	3
TOTALS January	1278.5	49%	558.75	21%	1837.25	70%	662.83	25%	54.5	2%	56	2%	773.33	30%	452
February 2009 SUMMARY															
Butler, Blair	104.5	46%	54.25	24%	158.75	69%	25.75	11%	1	0%	43	19%	69.75	31%	45
Dahlgren, Leanne	88	48%	47.5	26%	135.5	73%	42.5	23%	3	2%	3.5	2%	49	27%	6
Delisle, Marie-France	99	49%	64	32%	163	81%	14	7%	1.5	1%	22	11%	37.5	19%	8
Gagnon, Alain	41	25%	19	11%	60	36%	98.5	60%	0.5	0%	6.5	4%	105.5	64%	1
Kent, Nancy	55.5	32%	32.75	19%	88.25	51%	75.75	44%	0		9	5%	84.75	49%	22
Lalji, Sayrin	70	54%	43	33%	113	88%	9	7%	1	1%	6	5%	16	12%	29
Lim, Ken	110	57%	29.5	15%	139.5	72%	42.5	22%	10	5%	1	1%	53.5	28%	7
Liston, Robert	17	10%	1.5	1%	18.5	11%	150.67	89%	0		0		150.67	89%	
Marquette, Gerald	155	59%	50.5	19%	205.5	78%	58	22%	0		1	0%	59	22%	7
Mayer, Chantal	120	57%	74.17	35%	194.17	92%	14	7%	0		2.5	1%	16.5	8%	3
Pressey, Tracy	0		0		0		1	100%	0		0		1	100%	
Shaw, Dorothy	0		0		0		0		0		0		0		
Skoll, Amanda	73	49%	33.5	22%	106.5	71%	41.5	28%	0		1.5	1%	43	29%	1
Tessier, Francine	114	40%	55	24%	160	73%	60.75	26%	0		1	0%	61.75	37%	18

Excel Summary Physicians

Butler, Blair																	12-Jan-10
01-Jan-2009 - 31-Dec-2009																	
12 Months																	
Month	Direct	Direct %	Indirect	Indirect %	Subtotal Clinical	Subtotal Clinical %	Admin	Admin %	Research	Research %	Formal Teaching	Formal Teaching %	Subtotal NonClinical	Subtotal NonClinical %	Clinical Teaching	Personal CME	Non Worked Time
January 2009	107.0	64.1%	34.5	20.7%	141.5	84.7%	25.5	15.3%		0.0%		0.0%	25.5	15.3%	50.5	7.0	75.0
February 2009	104.5	45.7%	54.3	23.7%	158.8	69.5%	25.8	11.3%	1.0	0.4%	43.0	18.3%	69.8	30.5%	45.5	41.5	37.5
March 2009	188.0	52.0%	58.0	16.0%	246.0	68.0%	32.5	9.0%		0.0%	83.0	23.0%	115.5	32.0%	116.5	51.0	
April 2009	111.0	44.0%	81.0	32.1%	192.0	76.2%	50.5	20.0%	6.0	2.4%	3.5	1.4%	60.0	23.8%	28.5	21.5	30.0
May 2009	129.5	51.5%	70.0	27.8%	199.5	79.3%	32.0	12.7%	4.0	1.6%	16.0	6.4%	52.0	20.7%	39.0	17.0	22.5
June 2009	143.0	58.7%	51.5	21.1%	194.5	79.8%	39.8	16.3%	1.0	0.4%	8.5	3.5%	49.3	20.2%	51.5	10.0	37.5
July 2009	186.0	61.6%	57.0	18.9%	243.0	80.5%	29.5	9.8%	1.5	0.5%	28.0	9.3%	59.0	19.5%	84.5	14.5	46.5
August 2009	165.0	64.0%	51.5	20.0%	216.5	83.9%	10.0	3.9%	9.0	3.5%	22.5	8.7%	41.5	16.1%	41.5	31.5	30.0
September 2009	100.0	62.3%	33.5	20.9%	133.5	83.2%	13.5	8.4%		0.0%	13.5	8.4%	27.0	16.8%	77.5	21.0	67.5
October 2009	122.0	52.0%	58.5	24.9%	180.5	77.0%	41.5	17.7%	4.0	1.7%	8.5	3.6%	54.0	23.0%	100.5	8.5	32.0
November 2009	121.5	52.9%	27.0	11.8%	148.5	64.7%	36.0	15.7%	10.0	4.4%	35.0	15.3%	81.0	35.3%	46.5	30.0	15.0
December 2009	179.5	71.2%	50.5	20.0%	230	91.3%	14.5	5.8%	4.5	1.8%	3	1.2%	22	8.7%	108.5	11.5	54
Total	1657.0		627.3		2284.3		351.0		41.0		264.5		656.5		790.5	265.0	447.5
Average	138.1	56.7%	52.3	21.5%	190.4	78.2%	29.3	12.1%	3.4	1.4%	22.0	8.3%	54.7	21.8%	65.9	22.1	37.3

8. Include/Exclude Physicians

To change the physicians on the list you need to edit the distribution list ‘_CW_NS_Calendar’ (owner svcphais), then ‘Refresh Names from Distribution List’ above before uploading.

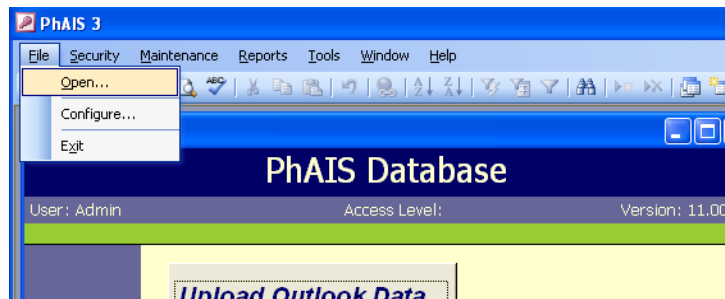
9. Install Info - Adding the categories to a coding operators computer

The PhAIS categories are saved in file Oag_Cat_TT.reg (V:\OBGYNIT\Phais 4). To add to a computer you simply double-click & confirm.
(Using regedit found here HKEY_CURRENT_USER\Software\Microsoft\Office\11.0\Outlook\Categories)

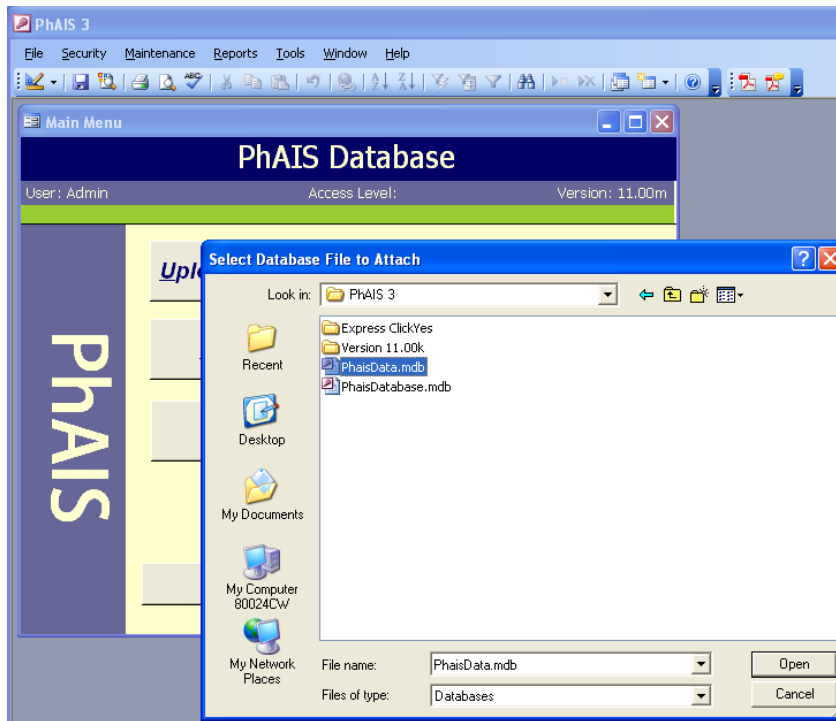
Note: if you need to email this file you have to change .reg to .txt and then reverse otherwise it is blocked by outlook

10. Install Info - To re-attach the datafile

On installation of a new application version or relocation of data the datafile may need to be reattached to the application.



The data should be C:\Phais 4\PhaisData.mdb



11. Install Info - ClickYes

We utilize a freeware program called Express ClickYes (V:\OBGYNIT\Phais 4\Express ClickYes). This is a tiny program that runs in the system tray and automatically clicks the Yes button for the Outlook security prompt, that asks you to confirm access to Outlook’s calendars otherwise the prompt is continually displayed.

12. Upload PhAIS Data to Education Database

Another MS Access application attaches to the live data file & converts PhAIS teaching activities into valid Education Database Program/Category/Subcategory combinations. The output data is uploaded to Education Database (MySQL)

Steps (described briefly)

1. You need some MS Access familiarity & Login as Helen (not for the non-technical)
2. Run Application V:\OBGYNIT\Phais 4\PhAISUpload\...\bPhaisUpload.mdb
3. Attach Table CalendarData to the latest datafile (PhaisData.mdb) using MS Access **Linked Table Manager**
4. **Maintain Physicians** – map Physician Name onto Education Database PhysicianID (number)
5. **Maintain Categories** – check the category mapping still has valid PhAIS categories (Table:Categories_LookUp) mapping to valid Education Database Program/Category/Subcategory combinations (Table:ProgramGroupsAndLevels).
6. click **Empty Entire Table**
7. Select required **Date Range** (maybe sufficient to just do this in Jan in time for Staff Review)
8. Click **Upload**
9. The results are output to Table **CalendarDataToUpload** –
10. Export CalendarDataToUpload to Excel
11. Within Education Database MySQL database empty table CalendarDataToUpload
12. Import Excel CalendarDataToUpload into MySQL CalendarDataToUpload
13. Append contents of CalendarDataToUpload to EduEntry using SQL

Main Screen

Master copies of two very important items to maintain here:
 List of names tblPhAISNames must contain the EducationDb PhysicianID and name (Surname, FirstName)
 Category mapping Categories_LookUp for PhAIS lookup related to Program, Category, Subcategory levels

Maintain Physicians Maintain Categories

Names

Empty Entire Table Empty This Person Only From Table This Physician Report

Date Range
 Annual
 Last Month
 This Month
 Date Range

Start Date:
 End Date:

Upload Exit

Maintain Physicians

Name	PhysicianID
Butler, Blair	350
Conlon, Maureen	0
Dahlgren, Leanne	63
Delisle, Marie-France	66
Gagnon, Alain	70
Kent, Nancy	81
Lalji, Sayim	127
Lim, Ken	83
Liston, Robert	87
Marquette, Gerald	88
Mayer, Chantal	89
Money, Deborah	92
Pressey, Tracy	260

PhysicianID=zero not uploaded Exit

Maintain Categories

Categories:

level1:
 level2:
 level3:
 level4:
 level5:

Description:
 ReportID:

ProgramLevel:
 CategoryLevel:
 SubCategoryLevel:

ProgramGroups AndCats Report Category Mapping Report

Exit

Record: of 51

Category Mapping Report (example)

<i>Categories</i>	<i>Program Level</i>	<i>Category Level</i>	<i>SubCategory Level</i>
NC>PrsnlCME> Self-assessment programs			
NC>PrsnlCME> Structured learning			
NC>Rsrch> Collaboration			
NC>Rsrch> Oth			
NC>Rsrch> Presentations			
NC>Rsrch> Writing and documentation			
NC>Tch> Fellowship/ Evaluations	Fellow - MFM	Admin	Evaluations
NC>Tch> Fellowship/Formal teaching	Fellow - MFM	Formal	PhAIS import
NC>Tch> Fellowship/Informal teaching	Fellow - MFM	Clinical	PhAIS import
NC>Tch> Med/Oth Phys/Other Specialties	Other Teaching/CME	Teaching	Physicians
NC>Tch> Multidisciplinary	Other Teaching/CME	Teaching	Interprofessional Team Members
NC>Tch> Nursing	Other Teaching/CME	Teaching	Interprofessional Team Members
NC>Tch> Postgrad / Formal teaching	Resident	Formal	PhAIS import
NC>Tch> Postgrad / Informal teaching	Resident	Clinical	PhAIS import
NC>Tch> Postgrad/ Evaluations	Resident	Admin	PhAIS import
NC>Tch> Undergrad / Informal teaching	Undergraduate - PhAIS	Clinical	PhAIS import
NC>Tch> Undergrad/ Evaluations	Undergraduate - PhAIS	Admin	PhAIS import
NC>Tch> Undergrad/ Formal teaching	Undergraduate - PhAIS	Formal	PhAIS import