

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 in folder **\\srvnetapp01\Cwbc\cwbc_depts\OAG\PhAIS Database (or V:\PhAIS Database)**.The data accumulates each month in order to perform annual statistics.

Computer Login: svcphais

Password :(ask Rosemarie)

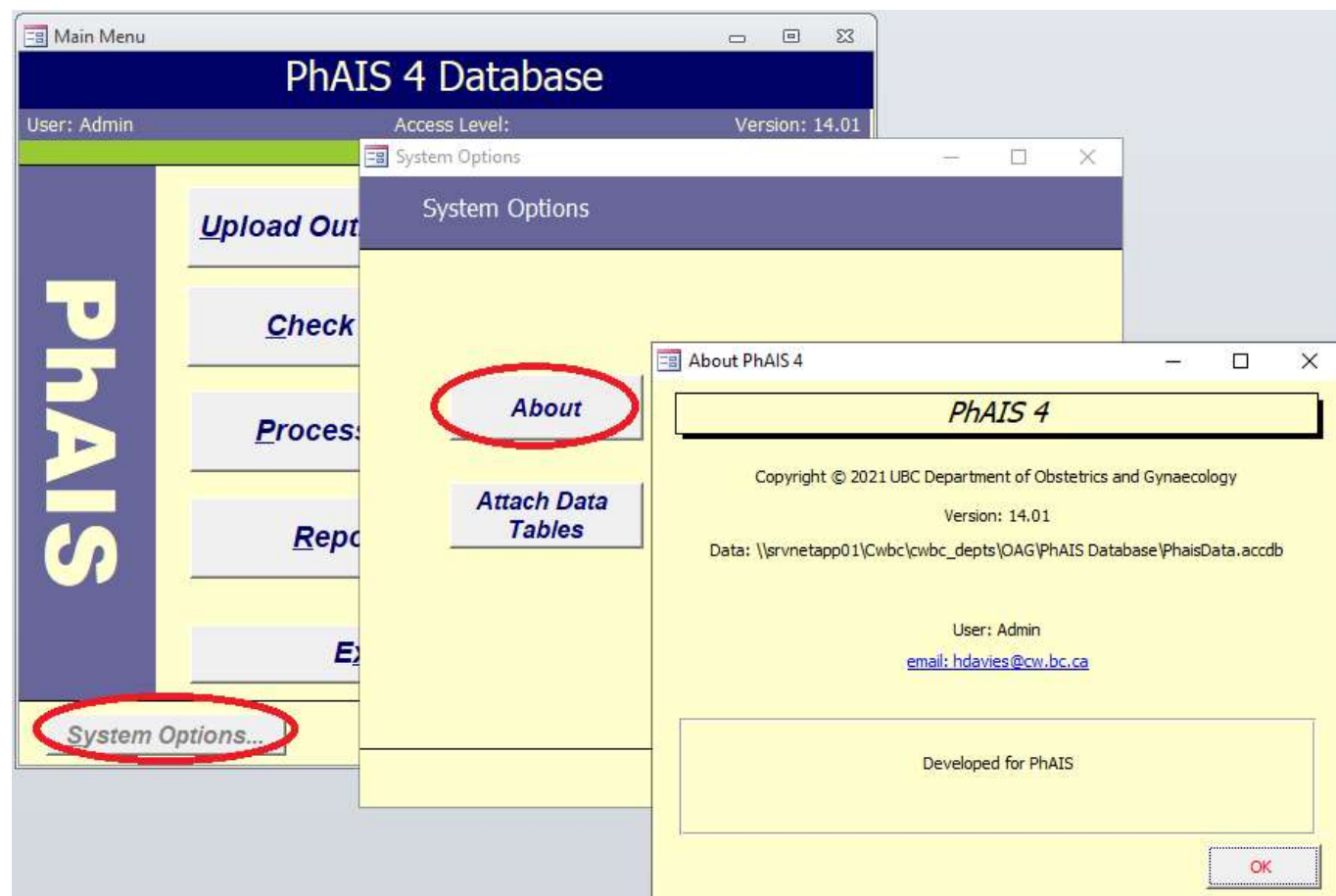
We can access every PHSA Calendar only by using this superuser login.

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

To run: double-click **\\srvnetapp01\Cwbc\cwbc_depts\OAG\PhAIS Database\PhaisDatabase.accdb**

The Main Menu appears with access to useful System functions below

System Options -> 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_Local'
- **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 1-3 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)

The status bar at bottom will show the progress made by displaying the physician name.

SPEED

- **is hugely affected by Recurring appointments which continue > 1 year**
- **affected by Calendars with >3000 items – ARCHIVE Outlook Calendar regularly!**

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

THE FOLLOWING USE THE CALENDAR TEMP DATA:
We can amend any errors highlighted here before appending the data to the cumulative table.

Either
Correct in Outlook - Empty that physician - upload individual physician a second time
or
Correct this temp data in 'Physician Records Check'

| | |
|----------------------------------|--|
| Summary Report of Data To Append | Check for possible hours missing |
| Zero Length Event Errors | Checking for possible Start/End date identical |
| Potential Category Errors | Checking for possible double categories, Inactive Categories |
| Physician Records Check | Before appending - you can amend errors in temp data here |

Exit

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 |
| Dunnell, Shannon | 239.5 |

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>CalendarName</i> | <i>DateStart</i> | <i>DateEnd</i> | <i>TimeStart</i> | <i>TimeEnd</i> | <i>IsRec</i> | <i>Subject</i> | <i>Categories</i> |
|----------------------------------|------------------|----------------|------------------|----------------|--------------|----------------|--|
| <u>Multiple Categories Error</u> | | | | | | | |
| Dunnell, Shannon | 8/2/2011 | 8/2/2011 | 7:30:00 AM | 8:00:00 AM | 0 | *HANDOVER | C> Indirect> Clnl Conf/Team Mtg, C> Indirect> Clnl Team Coverage |
| | | | | | | | <u>Uploaded as</u> C> Indirect> Clnl Conf/Team Mtg |
| <u>Minor Outlook Errors</u> | | | | | | | |
| Gagnon, Alain | 8/19/2011 | 8/19/2011 | 9:00:00 AM | 5:00:00 PM | 0 | *PHSA TIME | Personal, NC>Admin> Hospital busir |
| | | | | | | | <u>Uploaded as</u> 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 |
| | | | | | | | <u>Uploaded as</u> 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.

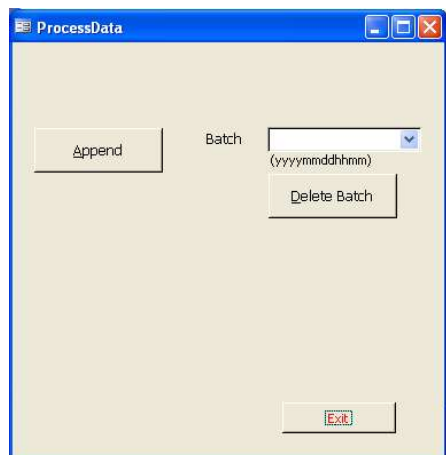
frmPhysicianRecords : Form

CalendarName: Dunnell, Shannon This Physician Report

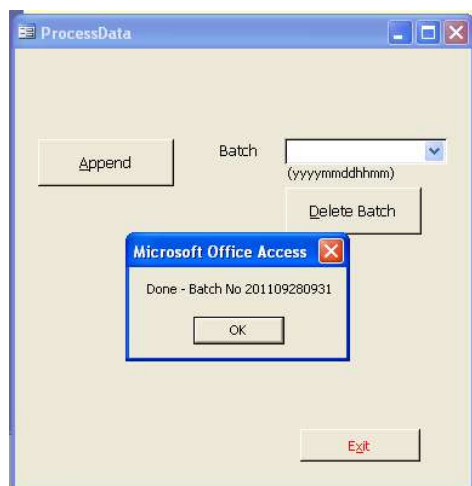
| CalendarName | DateStart | DateEnd | TimeStart | TimeEnd | IsRecurring | Subject | Categories |
|------------------|-----------|----------|------------|------------|-------------|--|---|
| Dunnell, Shannon | 8/1/2011 | 8/1/2011 | 8:00:00 AM | 3:30:00 PM | 0 | *STAT HOLIDAY | C>Direct>IP>Call |
| Dunnell, Shannon | 8/2/2011 | 8/2/2011 | 8:00:00 AM | 5:30:00 PM | 0 | *DAY CALL - August 02 2011 @ 11:00 "KG" 0236576. | C>Direct>IP>Call |
| Dunnell, Shannon | 8/2/2011 | 8/2/2011 | 8:00:00 AM | 5:30:00 PM | 0 | *Teaching Pamela Verma (med student) | NC>Tch>Undergrad/Clinical teaching |
| Dunnell, Shannon | 8/2/2011 | 8/2/2011 | 7:30:00 AM | 8:00:00 AM | 0 | *HANDOVER | C>Indirect>Clnl Conf/Team Mtg, C>Indirect>Clnl Team Coverage |
| Dunnell, Shannon | 8/2/2011 | 8/2/2011 | 5:30:00 PM | 6:00:00 PM | 0 | *HANDOVER | C>Direct>AC>clinics, C>Direct>AC>Patient care, C>Direct>AC>procedures, C>Direct>IP>Call, C>Direct>IP>Patient care |
| Dunnell, Shannon | 8/3/2011 | 8/3/2011 | 8:00:00 AM | 5:30:00 PM | 0 | *Teaching Pamela Verma (med student) | C>Direct>IP>Call, C>Direct>IP>Patient care |

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.

5.1 All Physicians Summary Reports for Last Month

icon.

All Reports will preview on screen, then click top print

Click **All Physicians**

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

- Fraser Health Summary
- 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
- Non-Clinical Personal CME Summary (give to Chris)

5.2 Individual Physicians Reports for Last Month

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

icon.

All Reports will preview on screen, then click top print

Required Reports:

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

5.3 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.

5.4 OVERAGE REPORTS (for Ken Lim)

Standard reports should use the **Default** setting.

However periodically Ken has asked for statistics on the Overage (defined as Weekends or Weekdays before 8am after 6pm)

Requests mostly for Excel Summary Chart By DateRange for specific dates.

Reports

All Physicians ☒

Names

Report

Search Text
(optional)

Date Range

☐ Annual

☐ Preceding Last Month

☒ Last Month

☐ This Month

☐ Date Range (mm/dd/yyyy)

Start Date

End Date

Times

☒ Default ☐ Overage All Categories ☐ Overage No Call

Overage=Weekends, Weekdays before 8am after 6pm (ignore percentages!)

Print Preview Exit

6. 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 | | | | | | | | | | | | | | |
| | Months | | | | | | | | | | | | | |
| Physician Name | Direct | Direct % | Indirect | Indirect % | Subtotal Clinical | Subtotal Clinical % | Administrative | Administrative % | Research | Research % | Formal Teaching | Formal Teaching % | Subtotal NonClinical | Subtotal NonClinical % |
| Butler, Blair | 1657 | 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 | 25% | 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 | | 58 | 3% | 304.75 | 18 |
| Shaw, Dorothy | 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 Dadelzen, 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 | Direct | Direct % | Indirect | Indirect % | Subtotal Clinical | Subtotal Clinical % | Administrative | Administrative % | Research | Research % | Formal Teaching | Formal Teaching % | Subtotal NonClinical | Subtotal NonClinical % |
| 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% | 2 |
| Delisle, Marie-France | 139.5 | 56% | 57.5 | 23% | 197 | 78% | 35.75 | 14% | 2.5 | 1% | 16 | 6% | 54.25 | 22% | 4 |
| 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 Dadelzen, 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% | 55.5 | 24% | 169.5 | 73% | 60.25 | 26% | 0 | | 1 | 0% | 61.25 | 27% | 19 |

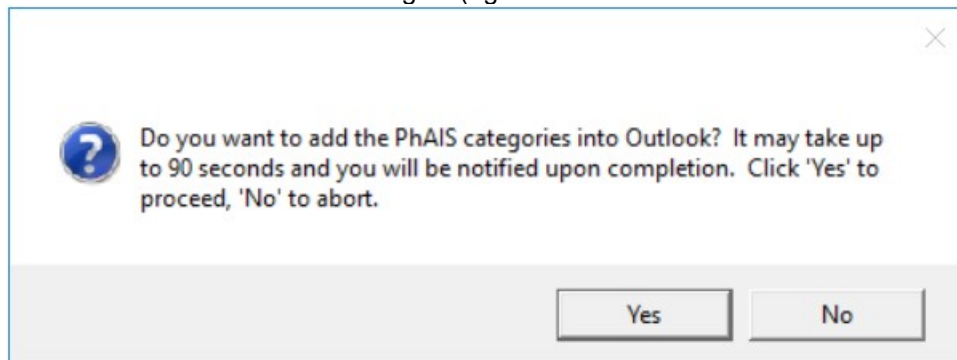
Excel Summary Physicians

| 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 | 18.8% | 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% | 230.0 | 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 |

7. Data Backup

On completion the live data file (V:\PhAIS Database\PhaisData.accdb) can be copied to a backup folder.

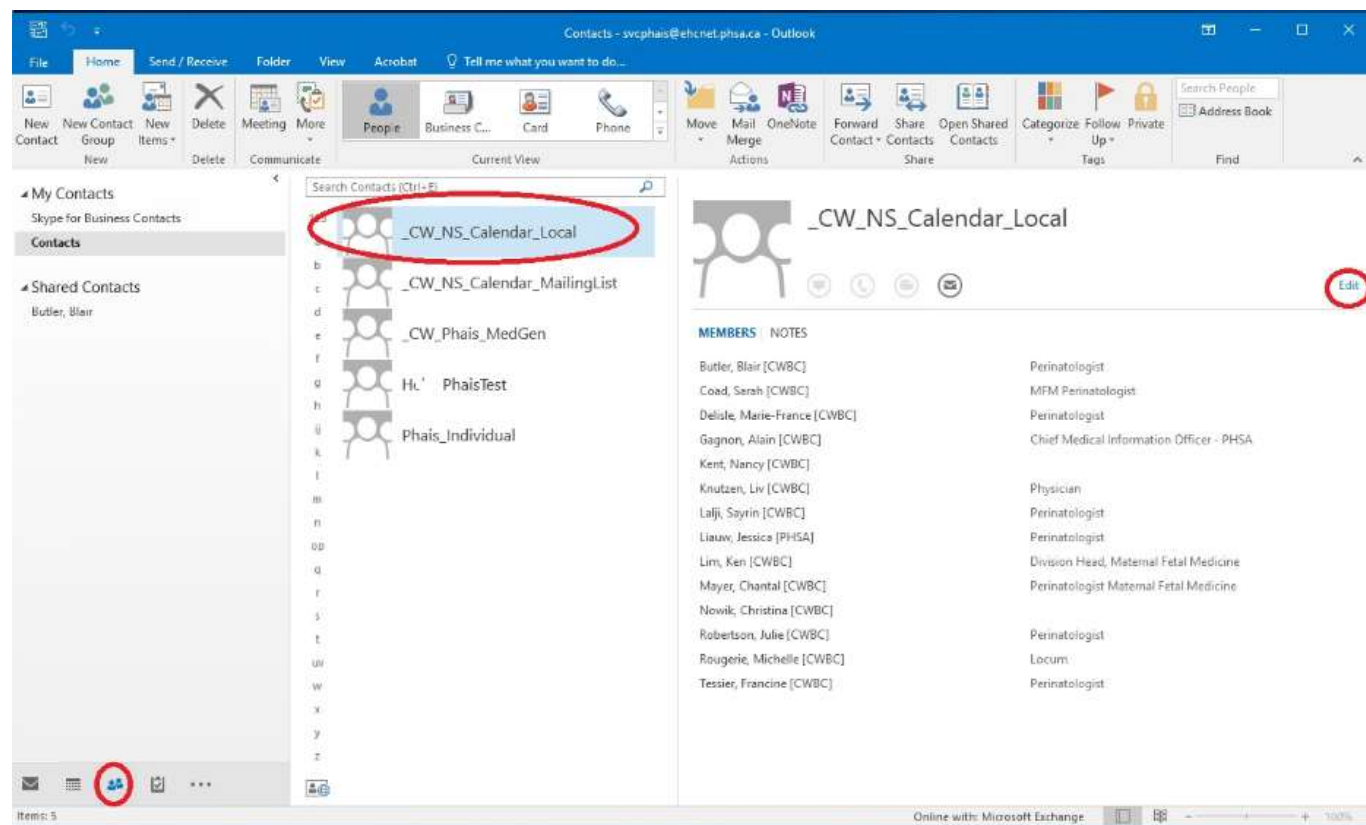
The latest version on the application (PhaisDatabase.accdb) can always be reinstalled from V:\OBYGYNIT\Phais 4\Version nn – where nn is the largest (eg 15.00



8. NEW PHYSICIAN - Include/Exclude Physicians for Upload

To change the physicians on the list you need to edit the distribution list ‘_CW_NS_Calendar_Local’ (owner svcphais), Add/Remove Physician names.

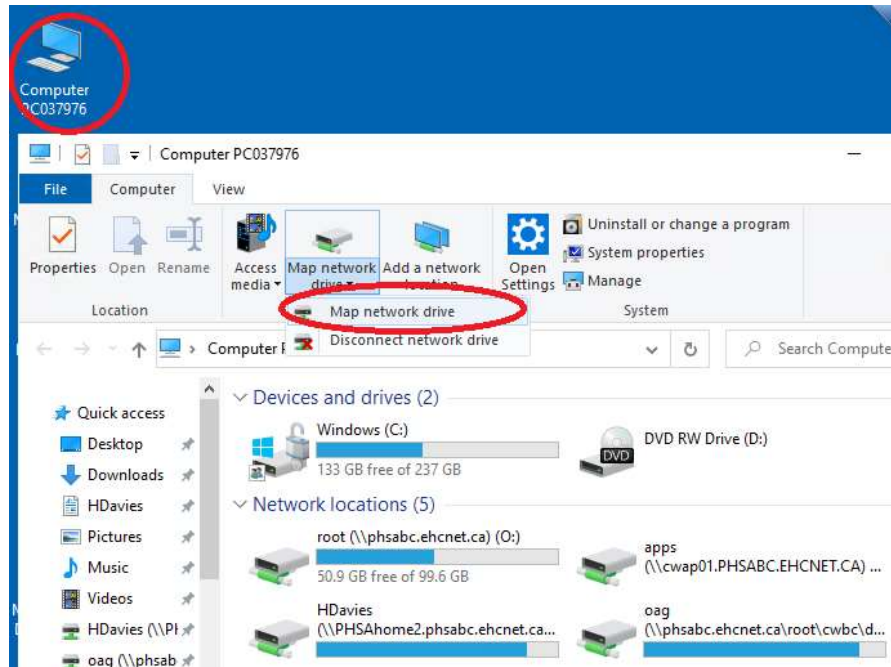
Then ‘Refresh Names from Distribution List’ above before uploading.



9. NEW PHYSICIAN - Map V: Drive

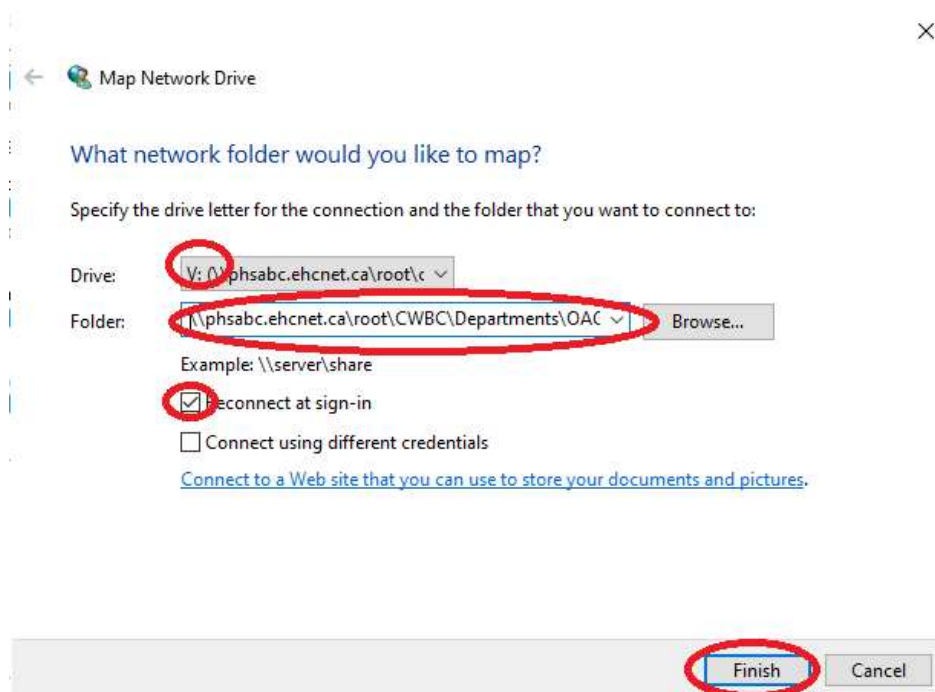
V drive should be configured by all new MFM physicians (this will ensure pathnames work well for category configuration)

Double-click 'My Computer' and 'Map network drive'



Select Drive V:

Paste Folder location `\\phsabc.ehcnet.ca\root\CWBC\Departments\OAG`

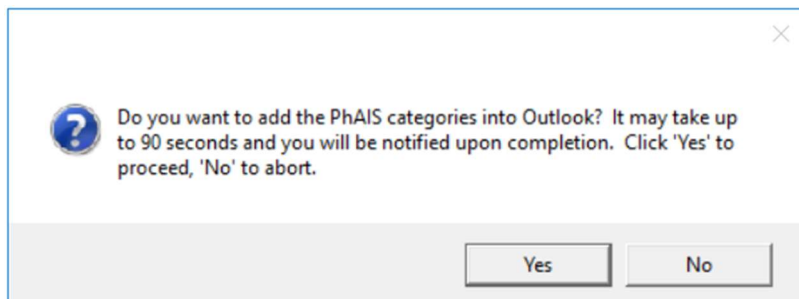


10. NEW PHYSICIAN - Add categories to Physician Outlook calendar

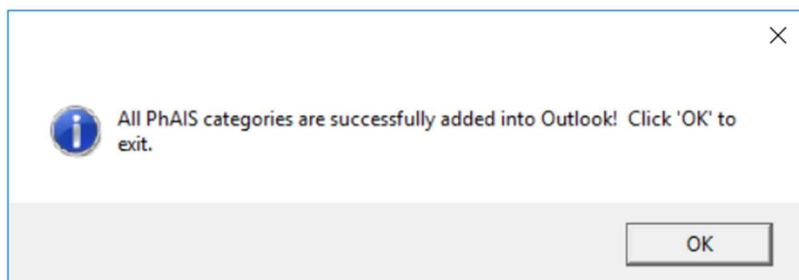
The following steps add the PhAIS categories to Physician's Outlook account and can be viewed on network computer AND Webmail.

Logged in as the physician!

- On the hospital network - Go to folder - V:\OBYGYNIT\Phais_Update_Outlook_Categories
- Copy 'PhAIS_Outlook_Categories(.vbs)' to Desktop
- Double-click to run.

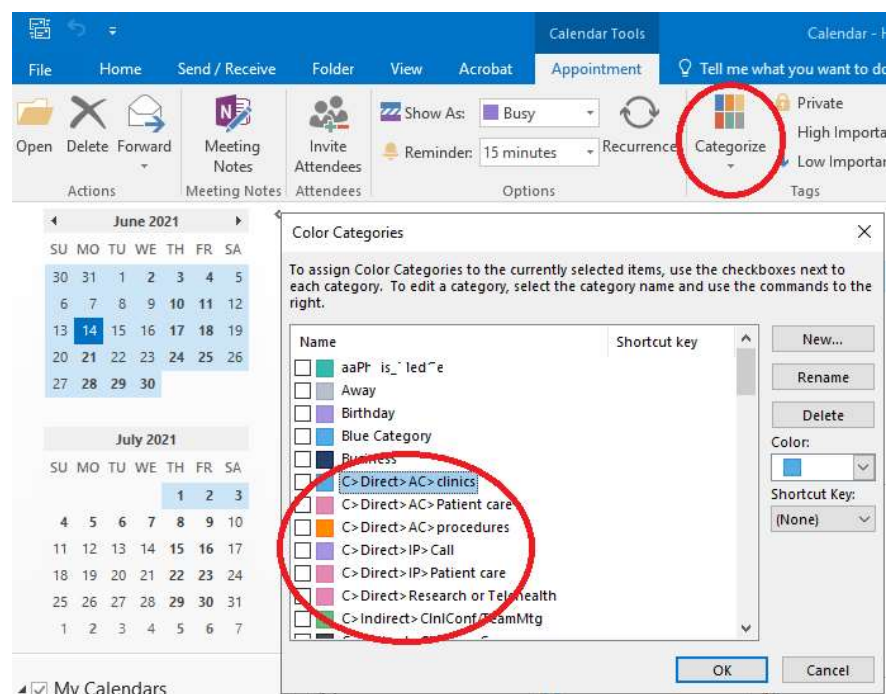


- Click Yes.



- Click OK.

Open Outlook Calendar – 'Categorize' – 'All Categories' to verify.



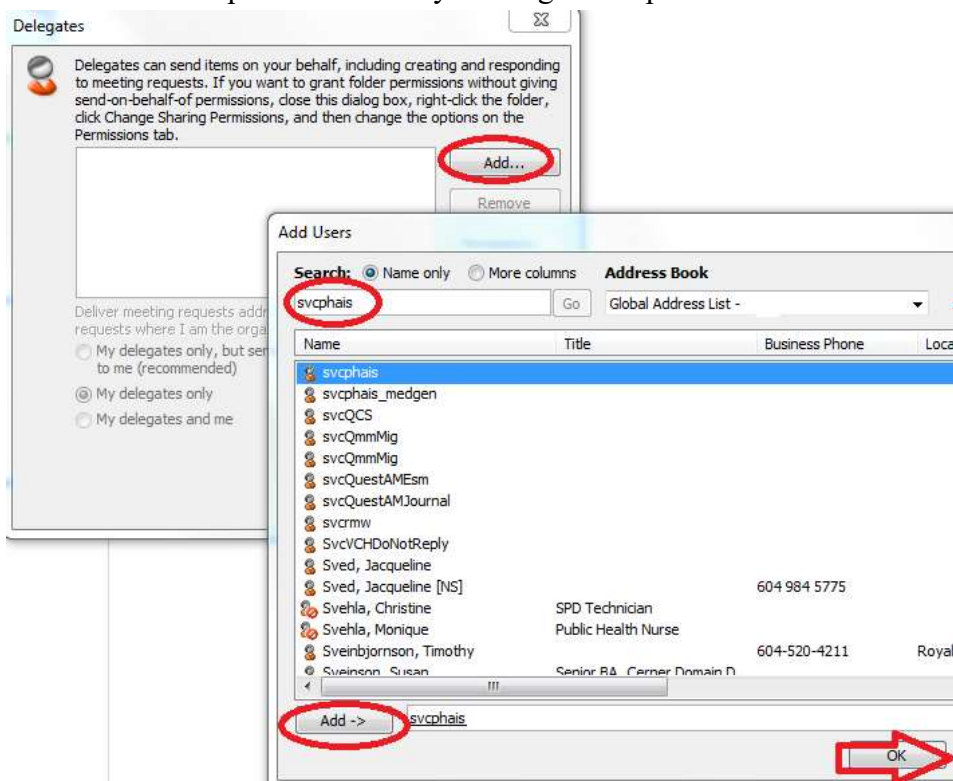
11. NEW PHYSICIAN – Delegate Calendar Access To svcphais

Although we are not making any changes, in order to view regular appointments and calculate recurring appointments **svcphais** needs access to **Read AND Edit** a Physician calendar.
Delegate access

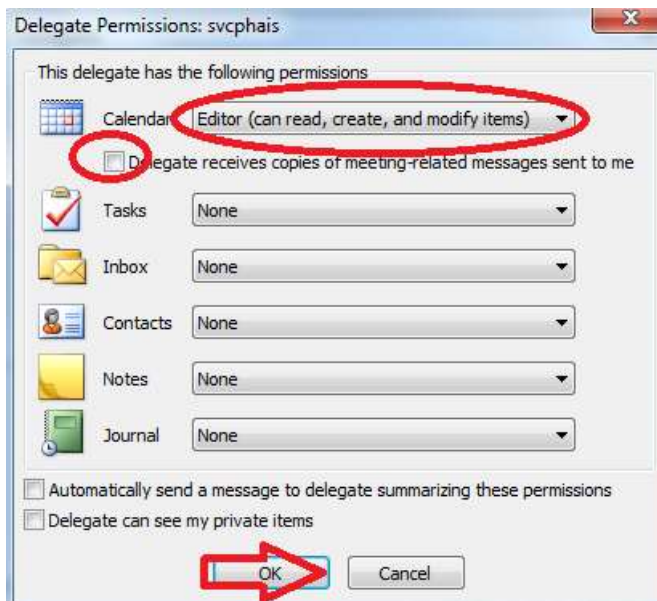
11.1. Locate Delegate Access



11.2. Add svcphais – if already exists go to step 4 ->

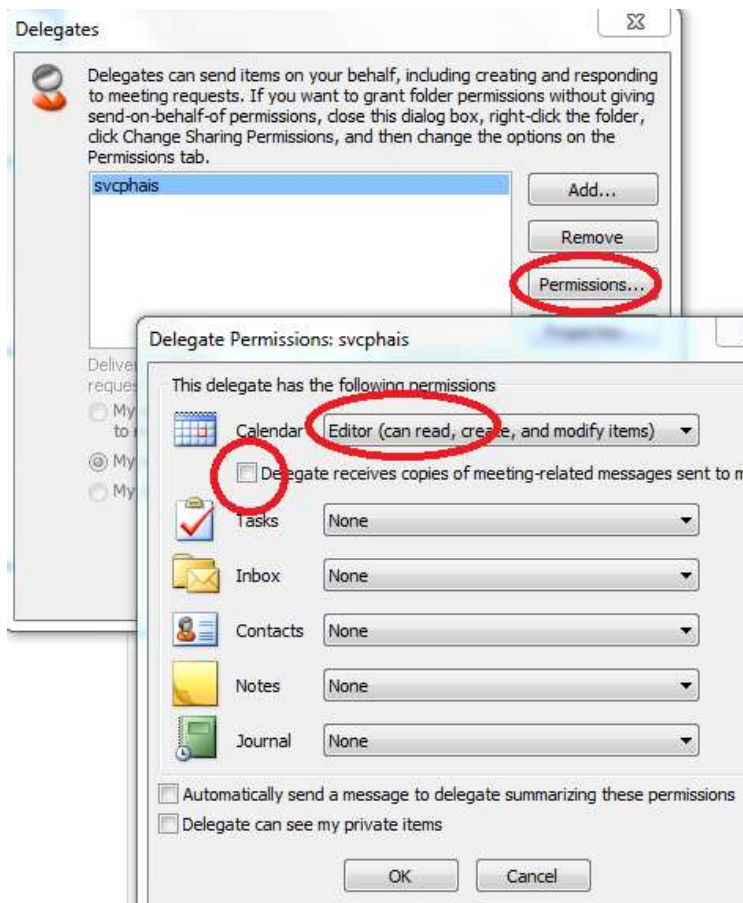


11.3. Set Permissions



Delegate receives copies UNCHECKED

11.4. Adjust Permissions



Note: Delegate receives copies... UNCHECKED

12. PHYSICIAN OUTLOOK ANNUAL ARCHIVING – Very necessary!

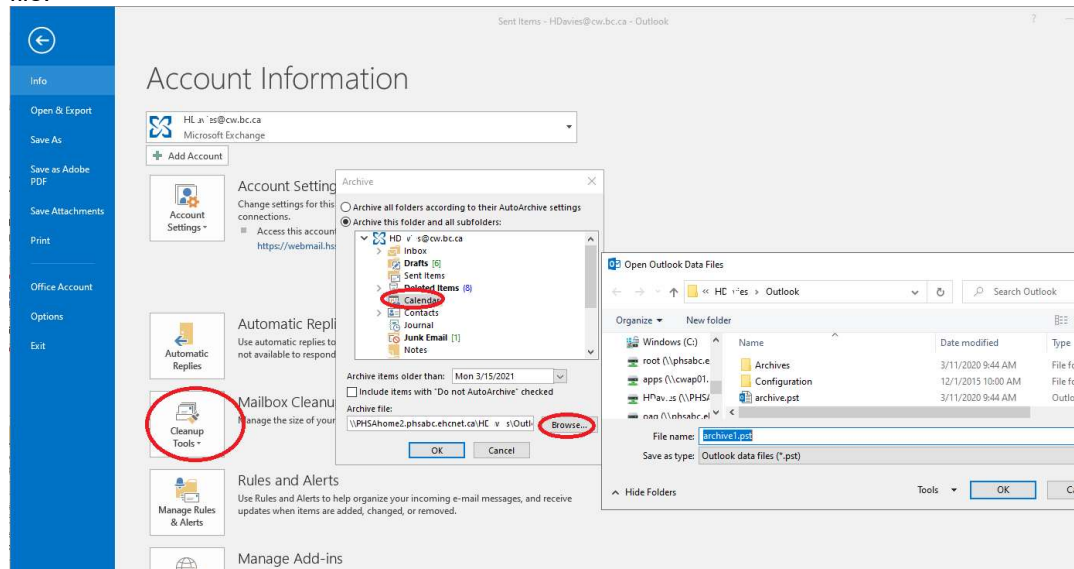
Use Outlook Archive functions to purge calendar appointments.

Also break & restart recurring appointments annually.

SPEED

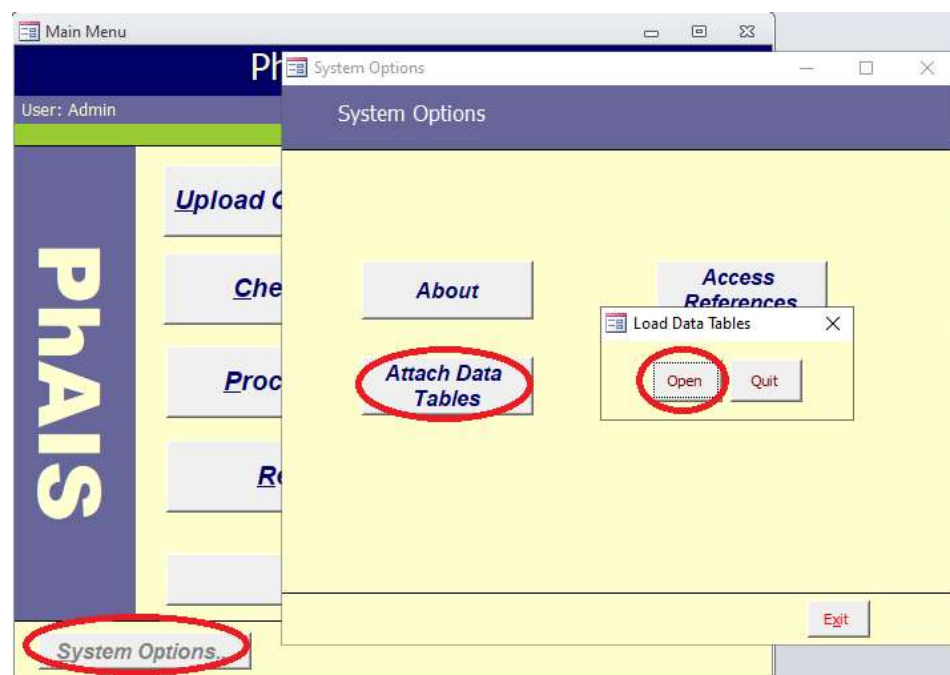
- **is hugely affected by Recurring appointments which continue > 1 year**
- **is affected by Calendars with >3000 items – ARCHIVE Outlook Calendar regularly!**

From Outlook 'File' -> 'Cleanup Tools' -> 'Archive' . Archived appointments can be viewed in an attached .pst file.

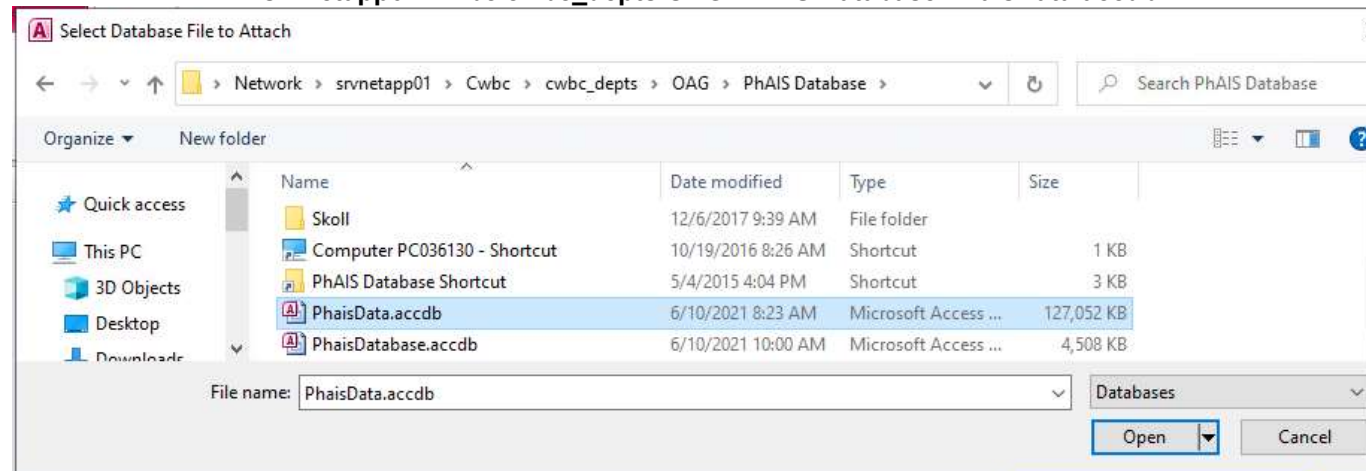


13. Install Info - To re-attach the PhaisData datafile

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 \\srvnetapp01\Cwbc\cwb_depts\OAG\PhAIS Database\PhaisData.accdb



14. 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\PhAISUpload\2021Jan_Apr2021PhaisUpload \...\PhaisUpload.accdb
3. Attach Table CalendarData to the latest datafile (PhaisData.accdb) 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, Blaine | 350 |
| Conlon, Maureen | 0 |
| Dahlgren, Leanne | 63 |
| Delisle, Marie-France | 66 |
| Gagnon, Alain | 70 |
| Kent, Nancy | 81 |
| Lalji, Sayin | 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_LookUp

Categories:

level1:

level2:

level3:

level4:

level5:

Description:

ReportID:

ProgramLevel:

CategoryLevel:

SubCategoryLevel:

Record: of 51

Category Mapping Report (example)

| <u>Categories</u> | <u>ProgramLevel</u> | <u>CategoryLevel</u> | <u>SubCategoryLevel</u> |
|---------------------------------------|-----------------------|----------------------|--------------------------------|
| 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/OthPhys/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 |