CACTUS FIELD GUIDE

Contains screen shots and field explanations for the CACTUS program and how they are used for the Medical Center, UPG, TCH, HS, and CPG.
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Note – Fields in blue indicate the data could be imported from AppCentral
Logging In

Once set up on your pc, use the desktop icon to open Cactus.

Log on with your normal user ID and password.

Select the UVA Medical Center (or whichever entity you need to use) option from this screen, and click the OK button.

It is normal to get a “production” alert.

The following Visual Cactus Desktop will result:
The Visual CACTUS Desktop consists of six main sections: the **Menu toolbar, Standard toolbar, Record Navigation toolbar, Organizer toolbar, Query toolbar** (appears only when a query is open in Edit mode), and the **Quick Start options**. Although navigating through Visual CACTUS is easiest via the mouse, there are also shortcuts or "hot-keys" available via the keyboard.

For more information regarding the specific icons in CACTUS, please see the **Appendix**.

*From the Desktop, click on the Open a File option. The following File Open screen will appear.*

Double click or open the Provider screen. The following Provider Find screen will appear. You can search by a number of different parameters, though Name is most common. In the Name field, enter provider’s last name, which must be spelled correctly. You can enter a partial last name, for example, for “Johnson”, you
could enter “John” and Enter.

Here’s an example of how a list providers with “John” as the first part of their last name would result. From here,

From the resulting list, double click on the name of the provider whose information you want to review.
• **ID**
  
  o **SMS** is the first ID number entered. This number originates in PR Doctor. The first four digits identify the provider’s department and division. The last two numbers are assigned by CSO. There is a binder with a written log to track these numbers. It is possible to assign the same number to more than one person, so use caution when assigning. **This field is validated through HSTS.**

  *Click the person icon to the right of the SMS field, left of the Active check box, to see more ID numbers*
- **UVA ID** is provided to CSO by LMS. This number is the 9-digit number on the back of the ID card. It is also used to access the Learning Management System (LMS). This will be provided to CSO on a spreadsheet from MCC Security. Copy the number from the spreadsheet and paste it into the field in CACTUS. To prevent errors, do not type this number into the field. **This field is validated through HSTS.**

- **Computing ID** is provided to Clinical Staff Office by MCC Security. This ID serves as the prefix of the employee email. This will be provided to CSO on a spreadsheet from MCC Security. Copy the number from the spreadsheet and paste it into the field in CACTUS. To prevent errors, do not type this number into the field. **This field is validated through HSTS.**

- **IDX Dummy number** is used by UPG if the provider has worked for UPG before, left, and now rehired into a different department.

  To hide the other ID numbers, click the person icon

- **Active** – indicates if the provider is active in at least one of the other entities with University of Virginia Health System (Medical Center, University Physician Group, CPG, Transitional Care Center, HealthSouth)

- **Full** – The name here should reflect how the name is presented on the medical license. If first initial and middle name is on the license, then that is what is recorded. Do not place any punctuation in the name unless a hyphen appears between names on the license. Place the suffix (Jr, III, etc.) in the suffix box. Initially, copy and paste this from the information provided from the Clinical Faculty Hiring Platform. If the license is different, then copy and paste from the license.

- **Degrees** – enter the initials for the primary degree, MD, DO, NP. Do not use any punctuation.
- **UPIN** is no longer going to be populated.
- **NPI** is found by clicking the icon to the right of the field and verifying the provider information.

**General Contact**
- **Phone** – this is the phone number for the Clinical Staff Office to contact the provider
- **Email** – this should be the University email address unless the provider only sees patients through Lynchburg Nephrology or other similar location. When a new provider is entered, their home email address will be entered on the Provider screen under General Contact. Copy this information from the Clinical Faculty Hiring Platform and paste into the CACTUS fields. This will change once it is confirmed they can access their UVa email account. **This is validated once per month.**

**Demographics**
- **DOB** – this will automatically generate age. **Confirmed monthly not blank.**
- **Gender** – M or F. **Confirmed monthly not blank.**
- **POB** – click the ... to enter the city, state, and country. This field will then auto populate
- **Marital Status** – enter if known
- **Spouse Name** – enter if known
- **SSN** – this field will not be visible to all users
- **Type**
- **Category** – select Clinical Staff or AHP. **Confirmed monthly.**

**Other Tab**

- **Other Provider Info** - If the provider has ever used a different name, enter it here. Examples would include maiden name, previously married name, or name before adoption.
- **Ethnicity** – Select the ethnicity from the dropdown list
- **Citizenship** – if citizenship is something other than US, enter the county of citizenship (Germany NOT German, United Kingdom NOT British). Then complete the Visa information
- **Languages** – Click the green + to add languages which the provider speaks fluently
- **Military** – enter military service current or previous

### User Defined Tab

![User Defined Tab](image)

- **Birth Month** – select the month in which the provider was born
- **Faculty Title** – select the title as provided by SOM HR or as offered in the email received from the Clinical Faculty Hiring Workflow, *This field will be validated twice a year.*

### Contacts Tab

Emergency Contact Information for the provider will appear here if known.

![Contacts Tab](image)
The Entity Tab could vary slightly depending on the entity you are using. From Corporate, all of the entities to which a provider belongs will be visible. In a specific entity, only that entity and Corporate will be visible.

- **When entering provider entity data, do NOT complete the information from the Corporate entity. Always change to the correct entity to enter the entity information.**

- To navigate to the different entities, use the green navigation buttons located on the CACTUS toolbar (red box).
- The identity of the entity you are in is indicated by both the tab and the name on the screen (orange boxes)
- On the Provider screen-Entity tab, although you will check the Active box to indicate the provider is active in the entity. Then, also choose the Status in the dropdown box. If you are entering information for a new hire, select “Applicant” until after the provider has been credentialed.
- All information entered on an entity tab is specific to that entity. Entity information is not shared among the entities. If you enter something on the Medical Center entity tab, it will not copy to the TCH entity tab.

**Entity Screen**

- **Active checkbox** – Is the provider Active in this particular entity. Remember, a provider can be active in one entity and no longer active in another entity.
- **Original Date** – date listed on the SOM contract or UPG contract (CPG employees) as the start date
- **Term Date** – date this provider’s relationship with this entity ended
- **Term Reason** – indicates why the relationship between this provider and the entity ended
- **Status & As Of** – indicates the current status of the provider and the date that was effective. This is only populated on the UPG entity screen.
- **Category** – indicates if the provider is PCP or Specialist and the date that was effective. This only populates on the UPG entity screen.
- **Continuous Query** – this is information which will be auto-populated by CACTUS
- **Information & Medical Directory Notes** – free text regarding any special information which should be known about the provider as they relate to this entity. If you see a yellow pencil over the box, you will know that information has been entered on the notes screen. Compare the box for “Information” to the box “Medical Director Notes”.
  - Indicates the type of contract which the provider has with UPG.
Entity Screen for UPG – if you are in the UPG entity

- **Category** – PCP or Specialist
- **Continuous Query** - this is information which will be auto-populated by CACTUS
- **Information & Medical Directory Notes** – free text regarding any special information which should be known about the provider as they relate to this entity. If you see a yellow pencil over the box, you will know that information has been entered on the notes screen. Compare the box for “Information” to the box “Medical Director Notes”.
- **Contract Type** – what is the contractual arrangement between UPG and the provider? Examples include STD IA, Part-Time >50%, and Clinical Practice Group.
- **Hours FTE**: - this is a free text field. It could contain a percentage of FTE or it could contain a number of hours.
- **Employ Agree Dept.** – Indicate with which department this provider will be employed
Information in the Assignment and Status boxes of this screen should only be changed through a credentialing instance. As of November 23, 2015, these fields are not locked on this screen. However, this does not mean that information should be changed here. **Do NOT enter Plans or Department/Division information from the Corporate entity.** Following this workflow will reduce the potential for error.

The screen for some entities might differ slightly.

A provider will have more than one assignment if they are employed by more than one department or division within the same entity.

- **Active Checkbox** – indicates if this plan is active for this provider. **Confirmed monthly.**
- **Assignment** – select the division for this particular assignment. Make certain to choose an assignment for the department in which they are employed. [Confirmed monthly.]
- **Original Date** – original SOM Contract date for this assignment.
- **As of** – date privileges were issued for this assignment.
- **From** – date current privileges began. [Confirmed monthly as a valid date.]
- **To** – date current privileges expire. [Confirmed monthly as a valid date.]
- **Designation** – indicate whether this assignment is a primary or secondary assignment for this provider at this entity. Every provider must have one and only one primary assignment. [Confirmed monthly.]
- **Network** – If a provider has privileges at MC, but their true primary assignment is outside of MC, CPG or Lynchburg Nephrology as examples, select that here.
- **Status** – status for this assignment. It should stay “Applicant” until privileges are approved. [Confirmed monthly.]
- **As of** – date the above status was effective
- **Category** – Indicates the Medical Center Bylaws category
- **As of** – date the above category was effective
- **AHP Group** – if this provider is an AHP, select the type of AHP they will be for this assignment. [Confirmed monthly as a valid entry.]
- **Clin Dept** – select the clinical department which will be employing this provider. For entities other than Medical Center, select the department which will correspond to the selected assignment. For all entities, make certain the department selected offers the assignment (division) selected above. [Confirmed monthly as a valid entry.]
- **Medical Director Notes, Information** – these will have a yellow pencil over them if information has been added. If a provider is practicing outside of their Boards, then they MUST have the information regarding the exception granted them noted here. This information should contain:
  - Boarded specialty
  - The name of the department chair requesting the exception
  - The reason for the exception
  - Summary of qualifications to practice in this assignment.
  - Date Credentials Committee approved the exception
- **Admitting Privileges** – check the box if the provider has privileges to admit patients in this entity for this assignment. For the CPG page, this will say “MC Privileges” to indicate if the provider as privileges at MC.
- **Department Chair** – check the box if the provider is a department chair.
• **Employed By, Employed by Date** – If a provider is leased to another entity, UPG for example, select the place which holds the employment contract for the employee (Medical Center or School of Nursing, for example). Then enter the date the leased contract began

• **Leased/CPG** – Is an AHP being leased somewhere? OR Is this physician part of CPG?
**Address Screen**

Unless you are a UPG employee and know the reason why, always select “No” when asked, “Attach addresses from the Group Addresses File?”

As of May 5, 2015, the only tab being populated on this screen is the “Address Details” tab.

There are five types of address to choose:

**Home Address**
Initially, for new hires, CSO will enter this information, or it will be populated from AppCentral. Then once they have established their local address, UPG will enter their new home address. W-2 statements are mailed to this address. After the initial entry, UPG is responsible for this address.
Correspondence Address
This is the address all mail communication from CSO is directed. Typically this will be a PO Box. (Stephanie enter rule for MC only employees). CSO is responsible for this address.

Primary Practice Location
This address is used by UPG for billing. It is critical that no one other than UPG employees touch this address. UPG is responsible for this address.

Alternate Practice Location
This address is not required. If a provider sees patients at more than one location, the alternate address is entered here.

Previous Address
This indicates that a provider used to see patients at this address, but no longer. This could occur because the provider has changed their location from one practice to another (PCC to Zion Crossroads, for example), or the entire practice has move to a new location/address.

- **Type** – select the type of address
- **Salutation** – if a letter should be addressed in a manner other than the default, change it here
- **Attention** – enter the person who should receive this in the mail (Office Manager, for example)

Provider Specific Contact Info
This section is only used if for some reason when contacting the provider at this address, a method of contact other than the one specified on the Provider screen, contact section should be used. An example would be a back office phone number which rings directly to the provider’s desk.
Street Address tab (the other tabs are not used)

<table>
<thead>
<tr>
<th>Group</th>
<th>Clinical Practice Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager</td>
<td>Debra Alien</td>
</tr>
<tr>
<td>Address</td>
<td>57 Dean Lane, Suite 202</td>
</tr>
<tr>
<td>City/State/Zip</td>
<td>Fishersville, VA 22939</td>
</tr>
<tr>
<td>County</td>
<td>Augusta</td>
</tr>
<tr>
<td>Name</td>
<td>Augusta Pediatrics</td>
</tr>
<tr>
<td>Phone</td>
<td>(540) 932-0960</td>
</tr>
<tr>
<td>Fax</td>
<td>(540) 213-9257</td>
</tr>
</tbody>
</table>

**VERY IMPORTANT NOTE – DO NOT EDIT ANY OF THE INFORMATION IN THIS SECTION. UPG WILL EDIT ADDRESS INFORMATION.** Unless a Home Address is being changed, all changes should occur in the Group Practice screen.

- **Group** – For CPG providers, the group name should be “Clinical Practice Group” unless they are seeing patients in a MC facility. For MC providers, this is in process of being standardize to match with EPIC Phase II.
- **Manager** – the name of the office manager for that clinic
- **Address** – the physical address of the clinic
- **Name** – the name of the practice location
- **Phone** – phone number of the practice
- **Fax** – fax number of the practice
**Affiliations/References/Other**

- **Institution** – this will auto-populate from the Institution tab
- **Active** – indicates if this person or employment is currently active for this provider
- **City, State, Phone** – these will auto-populate from the Institution tab
- **Affiliation Type** – select if this is the provider’s current employment, another institution where they hold privileges, previous employment, or reference
- **Category** – If affiliations relates to employment, select the provider’s service level (attending, consulting, locum, etc.)
- **Prov/Inst Type** – if related to employment, indicate if this is a group practice or hospital
- **Dept/Specialty** – if related to employment, indicate the specialty in which the provider served, if known
- **Start** – if related to employment, enter the start date. It is important to be accurate with this date
- **End** – if employment has ended, enter the end date. It is important to be accurate with this date.
- **Persistent Verification** – If a provider holds privileges elsewhere, then the status of those privileges needs to be confirmed each time they are credentialed and privileged.
**Institution Tab**

- **Inst. ID** – indicates if there is a number associated with this particular affiliation (usually blank)
- **Salutation** – enter if correspondence should begin “Dr”, “Mr”, “Ms”, etc. Can be left blank
- **Name** – enter the name of the person or business
- **Contact** – if this is a business, enter the name of a specific contact person if known
- **Address, City/St/Zip** – enter the street or PO Box information
- **Other information can be entered on this screen if known.**
Education

- **Institution** – this will auto-populate from the Institution tab. The institution tab remains constant throughout several screens. See information under Affiliations for details.
- **Program** – Select the type of program attended for this school. Note – If the provider was Chief Resident during one of their residency years, then Residency will be selected twice. The first time their faculty title will be “Resident” and the final year it will be “Chief Resident”. For physicians, the undergraduate degree is not needed. It must be entered for AHPs.
- **Degree** – Select the degree for this education
- **Dept/Specialty** – if there is a department or specialty associated with this degree, make the selection
- **Faculty title** – indicate if this was a fellowship, resident, or chief resident position if applicable
- **Start** – enter the date the program was started
- **End** – enter the date the program was completed
- **Graduate Complete** – select this box if the program was completed
- **Persistent Verification** –


Insurance Screen

- **Institution** – this will auto-populate from the Institution tab. The institution tab remains constant throughout several screens. See information under Affiliations for details. For most University of Virginia Health System providers, they will be insured through Piedmont Liability Trust.
- **Policy #**: if insured through Piedmont Liability Trust, the policy # should read “SELF INSURED”
- **Agent** – enter if you know the name of a specific agent for this particular insurance policy
- **Effective** – date this policy became effective. It is important for this information to be exact
- **Expiration** – date this policy will no longer be effective or when it ceased to be effective. If you see a yellow triangle, then the policy has expired.
- **Retroactive** –

**Claim Limits**
- **Per Claim** – for Piedmont Liability Trust, the default amount is 2.15
- **Aggregate** – for Piedmont Liability Trust, the default amount is 6.45
- **Active (in force)** – select this check box if this policy is considered to be the active insurance for this provider

**Other**
- **Coverage Type** – for Piedmont Liability Trust, this is “Per Occurrence”.
- **Specialty** – select if the provider is covered by a specific specialty.
- **Privilege Limitation** – if limits have been placed on the insurance coverage either voluntarily or otherwise, select this box and then explain in “Limitation info”
- **Persistent Verification** – select this box if this is the current, Active in force, policy.
License Screen

Fields in blue indicate they are required for LEMM verification. If any of these fields is left empty, an exception will occur during the LEMM enrollment process.

- **License** - Select the type of license. LEMM will update state license and DEA.
- **State** – enter the state which issued the license. [The most current LEMM information can be found online.](#)
- **Number** – enter the license number
- **Issued** – enter the date the license was issued
- **Status** – select the status of the license from the dropdown menu.
- **Expiration** – enter the date the license will expire
- **Field of Licensure** – select the field of licensure from the dropdown box.
- **Persistent Verification** – check if this license needs to continue to be verified
- **Submit to NPDB** – check if this license needs to be verified against the National Physician Data Bank.
Specialties & Boards Screen

Specialties
UPG will select the specialty for the provider. UPG will look at the Boards to determine if a requested specialty is appropriate for the provider. To add a specialty, you need to click the New button on the toolbar:

Providers:
As a general rule, the specialties will match the boards. For example, if a provider has the Amer Bd of Internal Medicine (Cardiology), then the specialty will be Cardiology. However, there are some instances where more clarification is needed. For example, if a provider has Amer Bd of Orthopaedics (Orthopaedic Surgery), then more specification is needed such as “Foot & Ankle” or “Spine”.

AHPs
As a general rule, the specialties will match the licensed specialty. For example, if a Physician Assistant has a licensed with listing a specialty of Physician Assistant, then the specialty would be listed as AHP – Physician Assistant.
- **Specialty** – Choose the specialty for the provider. This information is conveyed to the insurance companies for marketing purposes. As a general rule, these specialties should reflect the ABMS specialty boards.
- **Status** – Select whether this specialty is a board certified specialty, competency (fellowship training, for example), or not certified.
- **Type** – Choose whether this status will be the primary or secondary specialty for this provider
- **Active** – select if this specialty is an active specialty.

**Boards**

University of Virginia Health Systems recognizes the ABMS boards. If a board is needed and not present on the list, contact the CACTUS administrator to add the board. To add a board, click the green + icon.

Data for the Boards will auto-populate using the ABMS feature in CACTUS.

- **Board** - Select the board the provider is either certified or will be certified.
- **Status** - Choose the appropriate status of this board
- **Awarded** – enter the date the board was awarded
- **Expire** – enter the date the board expires
- **Recert** – enter the date for recertification
- **Reverification** – enter the date for reverification
- **Cert. No.** – enter the board certification number
- **Lifetime Cert** – select if the provider has been granted lifetime certification
- **Meets MOC Req** – select if the provider is eligible for MOC
- **Persistent** – select if the board should be persistently verified (this will usually be the case)
- **Eligible Date** – if the provider isn’t board certified, enter the date when the provider plans to take their board.
CSO Credentialing Screen

With a provider open, select CSO Credentialing from the open file type.

If a provider has an active credentialing instance, you will see a box similar to below. Click OK.
**Credentialing Setup tab**

- **Type** – select the type of credentialing for this instance. This field has been modified from the CACTUS default. All entities see the Corporate credentialing type. Only UPG sees the credentialing type for plan changes.
- **Group** - If the provider is part of a credentialing group, it will appear here.
- **Attestation** -
- **Privilege Dates** - Click this button to issue privileges to the provider.
- **Credentialing Completed** - indicates that all credentialing activities for all entities are complete.
- **Started** - date this credentialing instance was started.
- **Status** -
- **As of** -
- **Application Sent** –
- **Received** -
- **UPG Compliance Train** - for new hires, enter the date they are scheduled to complete their in-person UPG Compliance Training. For re-credentialing, enter the date they completed their CBLs. Once it is confirmed they have completed, check the Completed box.
- **Health Screening** - for new hires, enter the date they are scheduled to complete their health screening. Once it is confirmed they have completed, check the Completed box.
- **Epic** - for new hires, enter the date they are scheduled to complete their in-person Epic training.
Once it is confirmed they have completed, check the Completed box.

**Activity tab**

![Activity tab screenshot](image)

Activity tabs are entity specific. See the red box in the above image to see where to find the entity for this specific credentialing assignment. The credentialing activity tab is the only place information should be changed related to the credentialing of this provider. The Department/Division screen should only reflect information entered on this screen.

**Information upon Credentialing Completion:**

- **Activity Complete** – Select this box when all of the credentialing activity for this entity/assignment is completed
- **Assignment** – division or assignment for which the provider desires privileges
- **Original Date** – original SOM Contract date for this assignment.
- **As of** – date privileges were issued for this assignment.
- **From** – date new credentialed privileges began.
- **To** – date new credentialed privileges expire
- **Network** – If a provider has privileges at MC, but their true primary assignment is outside of MC, CPG or Lynchburg Nephrology as examples, select that here.
- **Status** – status for this assignment. It should stay “Applicant” until privileges are approved.
- **As of** – date the above status was effective
- **Applied for** – Bylaws category
- **Category** – Bylaws category
- **As of** – date Bylaws category effective
- **Term Reason** – indicate if this provider is leaving
- **Term Date** – enter the date the provider will be leaving
Information Before Credentialing Began:
Information in this section is prepopulated based on the information on the Department/Division screen and can’t be modified. This screen should reflect the information from the previous credentialing instance.

Committee Progress
- **Started** –
- **Status** – Indicates the committee which will approve this credentialing instance. This is a driving field behind many of the approval letters
- **As of**-date of either MCOB or PSQC
Committees – not in use as of 02/18/2016

To add someone to a committee:

1. Open a File
2. Committee Setup
3. Open
4. Select the committee
5. Open
6. Click the green +
7. Type the provider’s last name
8. Click Enter
9. Click on the Name
10. Click Add
11. Continue to enter names until all names have been entered.
12. Click Close
13. Under “Position Held”, click the drop down arrow and choose “Chair of the Committee” or “Member”
14. Enter the Begin Date and End Date if known
15. Click Save
Malpractice Claims

Institution information needs to be entered using the Institution tab

- **Action/Omission and Alternate** – select the infraction which occurred for the malpractice claim
- **Type of Payment** - select how the claim was paid – single one time or structured settlement
- **Payment result of** – select if this was a judgement or a settlement
- **Report Source** – how did UVA Health System learn of this claim
- **Start** - When the process began.
- **End** – date the process concluded
- **Status** – is this an open or closed claim
- **Pmt Date** – date the payment for this claim was made
- **Pmt. Amount** – amount of the settlement
- **Date** – court date
Group Practices

Only UPG employees should be entering information into Group Practices

Group Practices are maintained by UPG. They drive the billing. However, MC may change correspondence addresses for non-CPTG clinics/providers. Additionally, if a provider is NOT a UPG provider and just a MC provider, then MC may change the address for just those providers.

Group Tab

- **Name** – Name of the Practice Group. For CPG providers, this has been organized so that all CPG practices are located here. For MC, this organization remains to be completed as of November 23, 2015.

Other fields in this section are not currently being used as of 11/23/2015, but are left visible in case they are needed for EPIC Phase II.

- **Associated Providers** – displays the names of all providers who have been associated with this group. Providers are added by selecting this group in the **Address** section.

Addresses Tab

To add or remove an address from this group practice, use the green + or the red -

**Type** – In the Group Address section, this identifies this address as a correspondence address, a clinic location, or a hospital floor.
As of 11/23/2015, the other fields in this section are not being used, but are left visible if needed for EPIC Phase II.

- **Group** – For CPG providers, the group name should be “Clinical Practice Group” unless they are seeing patients in a MC facility. For MC providers, this is in process of being standardize to match with EPIC Phase II.
- **Manager** – the name of the office manager for that clinic
- **Address** – the physical address of the clinic
- **Name** – the name of the practice location
- **Phone** – phone number of the practice
- **Fax** – fax number of the practice
Quality – Data Validation –
For Medical Center Employees Only

University Title - Annual

This information is owned by SOM HR. Once a year, after tenure and promotions have been recorded in Oracle, they will provide a spreadsheet which can be compared against the CACTUS data. Request the following fields:

- Last Name
- First Name
- Middle Initial
- Suffix
- ComputingID
- University 9-digit ID
- Faculty title with just “Professor” and not “Professor in Pediatrics”

Run the query Faculty Title from Medical Center entity.

You can contact a colleague in the Clinical Staff Office who knows how to use the VLOOKUP feature in CACTUS, this will be very easy for them to match the data. Otherwise, proceed to the following:

- Copy the same columns from the SOM HR spreadsheet and place them next to the columns on the CACTUS spreadsheet.
- Although the names would match in a perfect world, they will not here. Go through the list. If a name is missing from one list or the other, select the cells with the missing information and choose “Insert”, then “shift cells down”. This will enter blank cells where data is missing.

- Once the names all match, you need to quickly find the titles which do not match. Click in the first cell with a faculty title from SOM HR.
- Click Conditional Formatting

  - Select “New Rule”
  - Select “Format only cells that contain”
  - Change the middle box to “not equal to”
  - Then, in the same row you are in (should be the first faculty name), click on the faculty title
listed by CACTUS.

- The cell will populate with something such as =$D$3. Delete the $ in front of the number
- Click the format button
- Select the fill tab
- Choose a color you like and click OK
- Click OK on the New Formatting Rule screen

- Click the Conditional Formatting button again.
- This time, choose “Manage Rules”
- Remove the $ sign in front of the number in the white box
- Click OK
- With the cell containing the first faculty title selected, click the Format Painter button

- Click and drag down to select all of the SOM HR faculty titles
- You should see sporadic cells highlighted where the names differ.
**Monthly Verification Checks**

Monthly verifications will be run on the first Monday or Tuesday which occurs after the second Friday of each month. Once these checks have been run and the data is verified, the files will be run for Data Warehouse.

All results should be recorded on the [Monthly Quality Check Log](Q:\private\SPEC_WRK\CREDEN\DATABASE\CLINSTAF\Quality Checks.xlsx) located at

**Sort Order**

Once a quarter (June, September, December, March), the Sort Order needs to be aligned to ensure accurate queries. This can be run prior to the validation queries.

1. In Corporate, Open a File
2. System
3. DBA Utilities – Open
4. Click the dropdown arrow next to “Workstation Options” and select “Database Administration”

5. Select “Update Provider Display Order”

---

![DBA Utilities](image1)

![DBA Utilities](image2)
**Computing ID & Email Confirmation**

1. In Medical Center, run the query, MC ComputingID v Email
2. Export to Excel
3. Delete Column B, Display order
4. Column C should now be the contact email address
5. Right align this column
6. Click on Row 1 and click the Filter button in the toolbar
7. Check to see if there are any blank Computing IDs (column B)
8. Check to see if there are any blank Email addresses (column C)
9. In cell D2, type: =LEFT(C2, LEN(C2)-25). Press Enter on your keyboard. You should see the Computing ID portion of the email address
10. Click on cell D2 again. Move your mouse to the lower right corner until you see a black +. Click and drag down to the end of your list.

11. Click on cell D2
12. Click Conditional Formatting on the toolbar
13. Click New Rule
14. Click Format only cell that contain
15. In the section “Format only cells with:” click the middle dropdown box and change it to “not equal to”.
16. Click in the third box
17. Click on cell B2
18. Delete the $ in front of the #2
19. Click the Format button
20. Click the Fill tab
21. Click a red color
22. Click OK
23. Click OK again
24. With E2 still selected, click the Format Painter button
25. Click and drag to the bottom of the column
26. If there are any mismatches, the cells in column E will turn red.
27. If you do not have any red cells and you want to check to make certain you did this correctly, change the value of C3 for example and cell E3 should change color

**If there is a mismatch:**

1. Drag select and copy the last name from the spreadsheet
2. Open Outlook and start a new message
3. Click the To button and paste the last name
4. Click on the name of the provider and click OK
5. Right click on the provider’s name in the To section of the new email and choose View Contact Card
6. Drag select the email address
7. In CACTUS, paste (Ctrl+V) the address on the Provider screen on the lower left-hand side of the screen.
8. Then, drag select the computing ID portion of the email address and paste it in the Computing ID section
Data Warehouse Information

1. Run the query MC All Providers from MC (you will need to run this for each entity).
2. Export to Excel
3. Select row 1
4. Click the Wrap Text button in the Excel toolbar
5. Click the Sort & Filter button in the toolbar, then choose Filter

6. Click the drop down arrow for each column to see if there are any blank fields. You might find a few blank fields for the Pathology department.
7. If there are any blank fields in any other column, this data needs to be corrected before the file is sent to Data Warehouse
8. To ensure the correct option is selected for Clin Staff/AHP, select just AHP. Then look in the Short Degree column to ensure the short titles match those for AHP (no, MD, DO, or DDS). Next select Clin Staff and ensure that all are MD, PhD, DO, DDS, or MBChB.
9. Next you need to confirm the correct division/department alignment. Click the drop down arrow for Column G, assignments (divisions).
10. Click the box next to Select All to deselect everything
11. Select the first assignment on the list (Acute Care & Trauma Surgery)
12. Confirm that the only department showing is the department which aligns with this division. If you have a division with many providers, you can simply click the drop down arrow next to Dept
to see if there are any other options available. If the correct departments are not listed, this will need to be corrected in CACTUS before the file is sent to Data Warehouse.

13. If you find a division with less than 3 providers, note this division and send a list to the CSO Director.
14. Continue this process through all of the assignments.
15. Next confirm there are no out of range dates for privileges. Choose only Active providers.

**Address Verification**

1. From Corporate, run the query Provider Selection. The only criteria to select is Entity Active Yes/No.
2. Export this list to flat file Address Check
3. Confirm all providers have data in home address, primary address, and correspondence address.

**License & DEA Pending**

1. From Corporate, run the query License Pending.
2. Export this list. Save it in Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\License Pending xx-xx-xxxx
3. Email the file to the Clinical Staff new hire personnel and the Director.

**Boards Pending**

1. From Corporate, run the query Board Monthly Check.
2. Export results to Excel
3. Filter row 1
4. Filter for any blanks in the board_rtk_provider column. Send this list to the CSO Director. Clear filter
5. Filter boardstatus_rtk to show all providers with a status of Board Eligible, No Value Specified, Pending Results, or Temporary Exception.
6. Look to see if there is a date in the certificationdate column. If so, change the status to Board Certified.
7. Filter the certificationdate column to show blanks. Send this list to the CSO Director. Eventually you should see a date in userdef_d1_providerboards. When this date appears, you can filter on all dates prior to today’s date to display providers who should have taken their boards by now.
8. Save this file to Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\Boards xx-xx-xxxx

**Insurance Expiration**

1. From Corporate, run the query Insurance Expirations
2. Export results to Excel
3. Save this file to Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\Insurance Expiration xx-xx-xxxx
4. Send this list to the CSO Director.

**Insurance In Force versus Persistent verification**

1. From Corporate, run the query InsuranceActive-Persistent
2. Export results to Excel
3. Save this file to Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\InsuranceActive-Persistent xx-xx-xxxx
4. Rename the columns Persistent and In Force
5. Copy the sheet
   a. Right click on the Sheet 1 tab at the bottom
   b. Choose Copy
6. Name 1 tab “In Force not verified” and name the other tab “No in Force but verified”
   a. Right click on the tab and choose rename
7. Click on Row 1 and turn on the Filter
8. On the sheet “In force not verified”, in the column “In Force”, select all to be T. For the “Persistent Verification” column, select this to be F.
9. Click on the tab “Not in Force but Verified”.
10. In the column “In Force”, select all to be F. For the “Persistent Verification” column, select this to be T.
11. Email this spreadsheet to the CSO Director and save it to the Q drive.

**Corporate-Entity-Assignment Active Alignment**

*Corporate Active aligns with Entity Active*

1. In Corporate, run the query “Provider Selection”
2. Run the query without any criteria being selected. All criteria options should be red X
3. Export this list to flat file CorpValidity. It takes a LONG time for this flat file to run.
4. Open this file in Excel. You will use this to validate data for several checkpoints. Save the file as Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\CorpValidity xx-xx-xxxx
5. Turn on the filters for row 1
6. Filter Column B, CorpActive to T.
7. Filter Column C, EntityActive 1 to F
8. Filter Column E, EntityActive 2 to F
9. Filter Column G, EntityActive 3 to F
10. Filter Column I, EntityActive 4 to F
11. If there are any providers in this list, send the list to the CSO Director
13. Filter Column B, CorpActive to F.
14. Filter Column C, EntityActive 1 to T
15. Look at the entity name in Column D. If the entity is UPG, send this list to UPG HR. If this entity is MC, send this list to the CSO Director.
16. Change the filter for ColumnC, Active Entity 1 to F
17. Filter Column E, EntityActive 2 to T
18. Look at the entity name in Column F. If the entity is UPG, send this list to UPG HR. If this entity is MC, send this list to the CSO Director.
19. Clear filter in column E
20. Filter Column G, EntityName3 to T
21. Look at the entity name in Column H. If the entity is UPG, send this list to UPG HR. If this entity is MC, send this list to the CSO Director.
22. Clear filter in Column G
23. Filter Column I, EntityActive 4 to T
24. Look at the entity name in Column J. If the entity is UPG, send this list to UPG HR. If this entity is MC, send this list to the CSO Director.
25. Clear all filters

**MC Active aligns with Assignments**
1. In MC, run the query “Provider Selection”
2. Run the query without any criteria being selected. All criteria options should be red X
3. Export this list to flat file MC Entity Active. It takes a LONG time for this flat file to run.
4. Open this file in Excel. You will use this to validate data for several checkpoints. Save the file as Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\MC Entity Active xx-xx-xxxx
5. Turn on the filters for row 1
6. Filter Column B, MC Entity checkbox, to T
7. Filter Column D to F
8. Filter Column G to F
9. Filter Column J to F
10. Filter Column M to F
11. Send this list to the CSO Director
12. Now do the reverse: Clear all filters. Filter Column B, MC Entity to F
13. Filter Column D to T
14. Copy these names
15. Undo filter in Column D
16. Filter Column G to T
17. Copy these names
18. Undo filter in Column G
19. Filter Column J to T
20. Copy these names
21. Send copied names to CSO Director as providers with an active assignment who are not active in MC.
22. Save file as Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\MC Entity Active xx-xx-xxxx

**TCH Active aligns with Assignments**
1. In TCH, run the query “Provider Selection”
2. Run the query without any criteria being selected. All criteria options should be red X
3. Export this list to flat file TCH Entity Active. It takes a LONG time for this flat file to run.
4. Open this file in Excel. You will use this to validate data for several checkpoints. Save the file as Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\TCH Entity Active xx-xx-xxxx
5. Turn on the filters for row 1
6. Filter Column B, TCH Entity checkbox, to T
7. Filter Column D to F
8. Filter Column G to F
9. Filter Column J to F
10. Filter Column M to F
11. Send this list to the CSO Director
12. Now do the reverse: Clear all filters. Filter Column B, CPG Entity to F
13. Filter Column D to T
14. Copy these names
15. Undo filter in Column D
16. Filter Column G to T
17. Copy these names
18. Undo filter in Column G
19. Filter Column J to T
20. Copy these names
21. Send copied names to CSO Director as providers with an active assignment who are not active in CPG.
22. Save file as Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\ TCH Entity Active xx-xx-xxxx

**HS Active aligns with Assignments**

1. In HS run the query “Provider Selection”
2. Run the query without any criteria being selected. All criteria options should be red X
3. Export this list to flat file CPG Entity Active. It takes a LONG time for this flat file to run.
4. Open this file in Excel. You will use this to validate data for several checkpoints. Save the file as Q:\private\SPEC_WRK\CREDENT\DATABASE\CLINSTAF\ CPG Entity Active xx-xx-xxxx
5. Turn on the filters for row 1
6. Filter Column B, HS Entity checkbox, to T
7. Filter Column D to F
8. Filter Column G to F
9. Filter Column J to F
10. Filter Column M to F
11. Send this list to the CSO Director
12. Now do the reverse: Clear all filters. Filter Column B, CPG Entity to F
13. Filter Column D to T
14. Copy these names
15. Undo filter in Column D
16. Filter Column G to T
17. Copy these names
18. Undo filter in Column G
19. Filter Column J to T
20. Copy these names
21. Send copied names to CSO Director as providers with an active assignment who are not active in HS.
22. Save file as Q:\private\SPEC_WRK\CREIDENT\DATABASE\CLINSTAF\HS Entity Active xx-xx-xxxx

**CPG Active aligns with Assignments**

23. In CPG, run the query “Provider Selection”
24. Run the query without any criteria being selected. All criteria options should be red X
25. Export this list to flat file CPG Entity Active. It takes a LONG time for this flat file to run.
26. Open this file in Excel. You will use this to validate data for several checkpoints. Save the file as Q:\private\SPEC_WRK\CREIDENT\DATABASE\CLINSTAF\CPG Entity Active xx-xx-xxxx
27. Turn on the filters for row 1
28. Filter Column B, CPG Entity checkbox, to T
29. Filter Column D to F
30. Filter Column G to F
31. Filter Column J to F
32. Filter Column M to F
33. Send this list to the CSO Director
34. Now do the reverse: Clear all filters. Filter Column B, CPG Entity to F
35. Filter Column D to T
36. Copy these names
37. Undo filter in Column D
38. Filter Column G to T
39. Copy these names
40. Undo filter in Column G
41. Filter Column J to T
42. Copy these names
43. Send copied names to CSO Director as providers with an active assignment who are not active in CPG.
44. Save file as Q:\private\SPEC_WRK\CREIDENT\DATABASE\CLINSTAF\CPG Entity Active xx-xx-xxxx

**System Test**

Through other systems used by UPG, the 9-digit university number and the SMS number will be validated. If there is an error, UPG will correct the error.

**Enterprise Test**

Although every effort is occurring to ensure data accuracy, as a final check, Quality will run a query to confirm the validity of the following fields before sending the CACTUS data on to Data Warehouse:

Departments and Divisions will be valid together (won’t have Dept – Pediatrics; Division – Maternal Fetal Medicine, for example)
Appendix

THE CACTUS DESKTOP

STANDARD TOOLBAR

The Standard Toolbar (Figure 3) is used to open tools related to the display and manipulation of database information. This toolbar offers quick access to most of the options available in CACTUS.

![Figure 3]

RECORD NAVIGATION TOOLBAR

The Record Navigation Toolbar (Figure 4) is activated for use whenever the open file type contains more than one record (for example, license or address records).

![Figure 4]

ORGANIZER TOOLBAR

The Organizer Toolbar provides quick access to several frequently used features such as Tasks, Activities and the SmartView (Figure 5).

![Figure 5]

QUICK START

Within the Quick Start section of the desktop, CACTUS offers illustrative icons for you to click and quickly access some of the most often utilized areas of the application.
OPENING CACTUS FILES

FILE OPEN METHOD

The File Open Method offers you access to all active files available at the selected entity via the File Open dialog (Figure 6). To accommodate a variety of user-preference, there are four different ways to open the File Open dialog form. These include:

- Selecting the Open a File shortcut on the CACTUS Desktop
- Choosing the File Open (folder) icon on the Standard Toolbar
- Navigating to File > Open via the menu bar at the top of the screen
- Using the Ctrl+O keyboard shortcut

The File Open dialog has three sections. These sections are described in Table 1.

Table 1: File Open Dialog Sections

<table>
<thead>
<tr>
<th>SECTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Types</td>
<td>The icons listed down the left side of the form represent the types of files available in CACTUS (refer to Table 2 for a description of the file types)</td>
</tr>
<tr>
<td>Available Files</td>
<td>The list of files available in CACTUS associated with the file type selected at the current entity</td>
</tr>
<tr>
<td>File Summary</td>
<td>A brief summary of the available file selected</td>
</tr>
</tbody>
</table>

QUICK LAUNCH METHOD

As an alternative to the File Open method, the Quick Launch Method offers you quick access to files used on a regular basis. The files displayed in the Quick Launch menu, as well as the order in which they appear, may be easily determined and arranged by your CACTUS System Administrator.

1. To open the Quick Launch menu, click on the black down arrow located to the right of the File Open icon in the Standard Toolbar (outlined in red in Figure 7). A menu of data files appears.

2. Select the desired file you wish to open and, depending on if you already have a provider open or not, either the Provider Find or the file itself will open for use.
CACTUS FILE TYPES

There are six main file types in CACTUS. Each file type includes specific files within the selected type. The main file types and a brief description of each are provided in Table 2.

The files available to you will vary depending on the security settings determined by your CACTUS System Administrator.

Table 2: CACTUS File Types

<table>
<thead>
<tr>
<th>ICON</th>
<th>FILE TYPE</th>
<th>SHORTCUT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Files</td>
<td>Alt+F</td>
<td>Displays all data entry files for which you have access (e.g., addresses, education, etc.)</td>
<td></td>
</tr>
<tr>
<td>Queries</td>
<td>Alt+Q</td>
<td>Displays all queries within CACTUS available to you and not tied to a document or report</td>
<td></td>
</tr>
<tr>
<td>Documents</td>
<td>Alt+D</td>
<td>Displays all documents for which you have access</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td>Alt+P</td>
<td>Displays all reports for which you have access</td>
<td></td>
</tr>
<tr>
<td>Reference</td>
<td>Alt+R</td>
<td>Displays all look-up or drop-down tables for which you have access</td>
<td></td>
</tr>
<tr>
<td>System</td>
<td>Alt+S</td>
<td>Displays all files needed to set up the CACTUS system</td>
<td></td>
</tr>
</tbody>
</table>

CACTUS FIELD TYPES

Each file type contains forms that contain several types of fields. A brief description of these field types can be found in Table 3 below.

Table 3: CACTUS Field Types

<table>
<thead>
<tr>
<th>FIELD TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference</td>
<td>Provides a list of options from which to choose</td>
</tr>
<tr>
<td>Date</td>
<td>Formats the date (displayed as MM/DD/YYYY)</td>
</tr>
<tr>
<td>Character</td>
<td>Holds numbers and characters in a limited number of character spaces</td>
</tr>
<tr>
<td>Logical</td>
<td>Indicates a “yes” or “true” statement when selected and a “no” or “false” statement when cleared</td>
</tr>
<tr>
<td>Numeric</td>
<td>Displays numerals or an amounts</td>
</tr>
<tr>
<td>Memo</td>
<td>Stores additional information</td>
</tr>
</tbody>
</table>