Clinical Operations Statement Review Process

What
Use this guide to review the Clinical Operations Statement.

Who
This process may be performed by Budget Officers, DFAs, Unit Analysts, or Budget Viewers in the School of Medicine. You can confirm your Tidemark authority in the Authority Manager application at https://authority.stanford.edu in the Financial System area and the Budget Management function.

Why
To provide departments a consolidated view of the Clinical Operations activities of Stanford Medicine.

When
Data is loaded monthly. The Dean's Office will announce when each month's data has been loaded and finalized.

Prerequisites:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You must have authority to use this process (granted through Authority Manager by org). You must have one of the following roles assigned to complete this process:</td>
</tr>
<tr>
<td></td>
<td>• Formula School Budget Officer</td>
</tr>
<tr>
<td></td>
<td>• School of Medicine DFA</td>
</tr>
<tr>
<td></td>
<td>• School of Medicine Unit Analyst</td>
</tr>
<tr>
<td></td>
<td>• Budget Viewer</td>
</tr>
<tr>
<td>2</td>
<td>Actuals from Oracle have been loaded to Tidemark, Dean’s Office has reviewed the data and notified users that the Clinical Operations Statement is ready.</td>
</tr>
</tbody>
</table>
Browser Requirements:
- Google Chrome
- Internet Explorer 11+
- Safari Mobile on IOS-4+

To access Tidemark:

<table>
<thead>
<tr>
<th>Step</th>
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</table>
| 1    | Access the Tidemark application from the following website:  
|      | - [https://stanford.tidemark.net](https://stanford.tidemark.net) |
| 2    | Log into the application through WebAuth using your SUNet ID and password. |
| 3    | Click the Financial Planning icon.  
|      | ![Financial Planning Icon](image1.png)  
|      | Result: Tidemark will list all financial planning processes available to you. |
| 4    | Click the Clinical Operations Statement icon to bring up the process.  
|      | ![Clinical Operations Statement Icon](image2.png)  
|      | Result: The associated process map appears. |
Clinical Operations Statement Overview

The Clinical Operations Statement is presented in several different formats, to allow users to easily see and understand the actuals associated with Stanford Hospital & Clinics revenue and expenses.

Panel Descriptions

<table>
<thead>
<tr>
<th>Panel Name</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>ClinOps Summary</td>
<td>Clinical Operations Statement categorized by Adult, Pediatric, and Other.</td>
</tr>
<tr>
<td>ClinOps Org Detail</td>
<td>Clinical Operations Statement for an organization and child orgs.</td>
</tr>
<tr>
<td>ClinOps Trend</td>
<td>Clinical Operations Statement by month.</td>
</tr>
<tr>
<td>ClinOps Export</td>
<td>Used with Excel Macro Script for better printing via Excel.</td>
</tr>
</tbody>
</table>

Anatomy of a Tidemark Panel

A - Click Caret to reveal the process map to select a different panel in the process
B - Page Slice is used to select report parameters such as Org and Year
C - Page Edges are used to filter what is shown in the panel
D - Rows and Columns of the grid display data
E - Left and Right Paddles are used to navigate to the prior and next panels in the process
F - The “In Context Menu” has tools such as collaborations and annotations
G - Expansion Arrows on rows give the ability to drill down into the dimension hierarchy
H - Gear Icon provides the ability to hide and/or unhide empty rows and/or columns
## Panel: ClinOps Summary Panel

Review Clinical Operations Statement categorized by Adult, Pediatric, and Other.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Click on the **ClinOps Summary** panel.  
**Result**: The corresponding panel opens. |
| 2    | Review the data displayed. |
| a    | Review the page slice.  
[Link](#) / Healthcare Services Reporting / FY 2016: Clinical Operations Statement for [VAAA - School of Medicine](#)  
The page slice controls which org is shown on the page. Your display will default to the highest level org for which you have authority. |
| b    | Review the page edges.  
| Organization: Select an org, or individual PA or PTA.  
Datasrc: This allows you to select Adult, Pediatrics, Other or All.  
Filter: Allows you to toggle between a high level group of object codes customized for these reports, or expand to see all expenditure types and object codes.  
Time: Allows you to choose an individual month, quarter or choose the Current Fiscal Year for YTD information. |
Review the rows on the grid.

Object codes and expenditure types are shown on the rows. The indentation of these rows shows the hierarchical relationship of the data presented.

When you see a right pointing arrow beside an object code, the object code can be further expanded by clicking on the arrow. When the arrow is pointing down, the object code has been fully expanded. When no arrow appears beside object code, the object code has no children; it is the lowest level object code.

By default you will only see object codes that have data. To see all rows, click the Customize View icon (lower, left, gray area), and set Hide empty grid rows to off.

Review the columns on the grid.

Columns show how data is segmented between Adult, Pediatrics, and Other. The total is presented in the All column.

Review the data.

Review the data presented in the grid. Use page edges, or navigate to additional reports for different views of the information.
Panel: ClinOps Org Detail

Review Clinical Operations Statement for an organization and its child orgs.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Click on the ClinOps Org Detail panel.  
**Result:** The corresponding panel opens. |
| 2    | Review the data displayed. |
| a    | Review the page slice.  
[*] Healthcare Services Reporting / FY 2016: Clinical Operations Statement for [VAAA - School of Medicine](#)  
The page slice controls which org is shown on the page. Your display will default to the highest level org for which you have authority. |
| b    | Review the page edges.  
| Organization: | Select an org, or individual PA or PTA.  
| Datasrc: | This allows you to select Adult, Pediatrics, Other or All.  
| Filter: | Allows you to toggle between a high level group of object codes customized for these reports (“ClinOps”), or expand to see all expenditure types and object codes.  
| Time: | Allows you to choose an individual month, quarter or choose the Current Fiscal Year for YTD information.  

Tip: For larger departments, when the department is selected in the slice, the divisions are shown as columns. Use the Organization page edge to filter to a single Division in order to drill down to PA/PTA level data.
c) Review the rows on the grid.
Object codes and expenditure types are shown on the rows. The indentation of these rows shows the hierarchical relationship of the data presented.

<table>
<thead>
<tr>
<th>Object Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>400RV - REVENUES</td>
<td>Healthcare Services</td>
</tr>
<tr>
<td>42001 - HEALTHCARE SERVICES</td>
<td>Professional Services Revenues</td>
</tr>
<tr>
<td>&gt; 421WR - WRVU PAYMENTS</td>
<td>Program Support Supplement</td>
</tr>
<tr>
<td>&gt; 422BP - BENEFITS REIMBURSEMENT</td>
<td></td>
</tr>
</tbody>
</table>

When you see a right pointing arrow beside an object code, the object code can be further expanded by clicking on the arrow. When the arrow is pointing down, the object code has been fully expanded. When no arrow appears beside an object code, the object code has no children; it is the lowest level object code.

By default you will only see object codes that have data. To see all rows, click the Customize View icon, (lower right gray area) and set **Hide empty grid rows** to **off**.

d) Review the columns on the grid.

Columns show the selected org, and all orgs one level down in the org hierarchy. If the department selected is the lowest level org, its owned PAs and PTAs will be shown.

3) Review the data.
Review the data presented in the grid. Use page edges, or navigate to additional reports for different views of the information.
Panel: ClinOps Trend
Review Clinical Operations Statement by month.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | **Click on the ClinOps Trend panel.**  
**Result:** The corresponding panel opens. |
| 2    | Review the data displayed.  
| a    | Review the page slice.  
\[ / Healthcare Services Reporting / FY 2016: Clinical Operations Statement for [VAAA - School of Medicine](#)\]  
The page slice controls which org is shown on the page. Your display will default to the highest level org for which you have authority.  
| b    | Review the page edges.  

**Organization:** Select an org, or individual PA or PTA.  
**Datasrc:** This allows you to select Adult, Pediatrics, Other or All.  
**Filter:** Allows you to toggle between a high level group of object codes customized for these reports, (“ClinOps”) or expand to see all expenditure types and object codes.  
**Time:** Allows you to choose an individual month, quarter or choose the Current Fiscal Year for YTD information.
Review the rows on the grid.

Object codes and expenditure types are shown on the rows. The indentation of these rows shows the hierarchical relationship of the data presented.

When you see a right pointing arrow beside an object code, the object code can be further expanded by clicking on the arrow. When the arrow is pointing down, the object code has been fully expanded. When no arrow appears beside an object code, the object code has no children; it is the lowest level object code.

By default you will only see object codes that have data. To see all rows, click the Customize View icon (lower, left, gray area), and set *Hide empty grid rows* to off.

Review the columns on the grid.

Columns show the selected year total, and individual totals for each month.

Review the data.

Review the data presented in the grid. Use page edges, or navigate to additional reports for different views of the information.
Panel: ClinOps Export

This panel is only to be used in conjunction with the Excel macro script to improve the print / pdf capability. This process will work on either a Windows or Mac environment. Mac users must have Excel 2016.

<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 1    | Click on the ClinOps Export panel.  
**Result:** The corresponding panel opens. |
| 2    | Review the data displayed.  
| a    | Review the page slice.  
|      | → Healthcare Services Reporting / FY 2016: Clinical Operations Statement for VAAA - School of Medicine  
|      | The page slice controls which org is shown on the page. Your display will default to the highest level org for which you have authority. |
| b    | Review the page edges.  
|      | ![Page Edges](image)  
|      | The page edges allow you to filter the data displayed on the page. A + symbol on the page edge filter arrows indicates that you can select multiple items in that category.  
|      | **Organization:** Select an org, or individual PA or PTA.  
|      | **Datasrc:** This allows you to select Adult, Pediatrics, or All.  
|      | **Filter:** Allows you to toggle between a high level group of object codes customized for these reports, or expand to see all expenditure types and object codes.  
|      | **Time:** Allows you to choose an individual month, quarter or choose the Current Fiscal Year for YTD information. |
| c    | Export the panel to Excel  
|      | Use the Export icon to download the data to Excel.  
|      | ![Export Icon](image)  
|      | **Result:** A file will appear at the bottom of the browser and in your computer’s download folder. |
d. Scroll to the bottom of the panel below the grid and download the Excel Macro.

Result: The Excel Macro file will appear at the bottom of the browser.

```
ExcelMacro for ClinOps ... ******
01/20/2017 8:10 am
```


e. Open the Excel Macro by clicking on the file at the bottom of the browser (and enable it for editing depending on your Excel security settings)

Result: The file will be opened in Excel and a dialog box will appear

```
Process ClinOps Data

The script only processes exports of the report:
ClinOps Export
in the 'Clinical Operations Statement' process in Tidemark

Process...

version: 2017-01-23c
```

f. Run the macro by clicking the Process... button.

Result: A prompt will appear that will allow you to either run the script on the most recently downloaded file by clicking “Yes”, or give you a chance to browse to a different file that may have been previously exported if you select “No”.

```
Microsoft Excel

Process 'X:\X\Export (X:\x\) in the Downloads folder? Or click 'No' to browse to a specific file. Each file will take about 30 seconds to process, depending on their size.

Yes   No
```

Result: The macro should take about 30 seconds to run using the most recent ClinOps Export file or file that you have browsed to select. A new Excel workbook will be created which can be saved to your desired location. Click OK to view the new workbook that has been created.
Review the data. The new Excel workbook will have several tabs which will mimic the ClinOps panels for Summary, Org Detail (Total, Adult, Pediatric and Other) and Trend. Each tab will be optimized for printing in summary view but since it is in Excel, the user can adjust the print preferences of any and all tabs. The files can be printed to PDF files instead of paper for ease of distribution by email. The files are grouped in the most summarized level but can be drilled to lower level object codes. Save file to desired location.