



BMC2 Vascular Surgery 2021 Peer Review Coordinator Upload Guidelines

Case Lists

The BMC2 Coordinating Center will post the case list to the [BMC2](#) website under the reports section on March 1, 2021. This list will contain the BMC2 discharge ID#s, BMC2 procedure ID#s, DOB, Gender, and the procedure date. Coordinators will be required to upload the redacted documentation for a maximum of 6 cases. **The Vascular Surgery Case File Upload Deadline is 4/16/2021.** Sites will use the same case list for the External Peer Review and the Internal Peer Review. Keep track of the name of the physician who performed the VS procedure.

- To retrieve your case list:
 - Sign in to the [BMC2](#) website using Chrome, Firefox, or Microsoft Edge. Do not use Internet Explorer. You will not be able to access your case list if you sign into the website using Internet Explorer.
 - Click on the **Downloads** link under the **Main Menu** on the left side of the screen.
 - Click on your **site number**.
 - Click on **reports**.
 - Click on the **vsurg_peer-review** link.
 - Click on the **2021** folder.
 - Review the list of cases.

If a coordinator cannot retrieve the required documentation for the assigned cases, they must contact the Coordinating Center to request a "replacement" case assignment. If you have questions or need assistance, please contact the Coordinating Center at (734) 328-4267.

Required Documentation

Each assigned case should include the documentation listed below. Combine the documents into **one PDF file**. Name each file using this method: **BMC2_VS_[the Discharge ID#].pdf**. For example, if the DC ID# is 1234567. You will name the file BMC2_VS_1234567.

- ☐ Office note prior to the procedure
- ☐ Pre-procedure H&P
- ☐ Pre-procedure imaging report. Send all that apply.
 - ☐ CT
 - ☐ ABIs
 - ☐ TBIs
 - ☐ Toe pressures
 - ☐ Vein Mapping
- ☐ Complete operative note:
- ☐ Complete Discharge Summary
- ☐ 30-day follow-up note
- ☐ 30-day imaging report
 - ☐ ABIs
 - ☐ TBIs
- ☐ Optional: One other relevant document, if necessary, to be able to verify appropriateness

File Redaction

The process for obtaining and redacting files will vary by site, depending on the protocols and procedures in place. If you are not familiar with your site's protocols, BMC2 recommends contacting your Health Information Management (HIM) or Medical Records department for assistance. If you have questions regarding the redaction of a piece of



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information, contact the [Coordinating Center](#) for clarification. **Please read the redaction guidelines carefully. Failure to follow these guidelines could result in a deduction of P4P points.**

Information to redact:

- PHI: Patient Name, MRN, SSN, address, full-face photograph, etc.
- Geographic areas smaller than a state (city, township, street name, etc.)
- Encounter number, FIN number, insurance plan
- References to the hospital or location of the procedure (hospital name, address, zip code, site logo)
- Operator information or referring physician
- All employee names
- All phone numbers and fax numbers
- Any information that could allow a reviewer to identify the patient, the hospital, or the physician

Do not redact the patient's DOB unless the patient is over 89 years old. **Do not** redact the date of service listed on the document.

Methods for redacting information

Adobe Acrobat Pro comes with an easy-to-use redaction feature for redacting information in PDFs. We find this is the **best method** of ensuring that the reviewer cannot see the redacted information.

Using Adobe Acrobat Pro for Redaction:

- Sign in to your EMR
- Epic users go to [page 5](#) for instructions on how to remotely redact a pdf.
- Cerner users go to [page 9](#) for instructions on how to remotely redact a pdf.

Manual Redaction:

- **Whiteout tape/rollers** (Next best method if Adobe Acrobat Pro is not accessible).
- **Black marker** (Sharpie, Magnum, Flipchart, etc.) **You must copy the documents after redacting the information with a black marker before scanning the documents so that information will not show through the marker.** The coordinating center will return the documents to the coordinator for correction, and P4P points will be deducted if the information shows through the black marker.
- The HIM/Med Records Departments at some sites will gather and redact the required information; however, **the coordinator is responsible for communicating to the HIM/Med Records Department the information to redact.**
 - **Coordinators are responsible for verifying that all necessary fields have been removed**
 - Coordinators are still required to upload documents following the guidelines given by BMC2
 - **Please have a co-worker double-check your redaction before uploading your file.**

Uploading Case Files

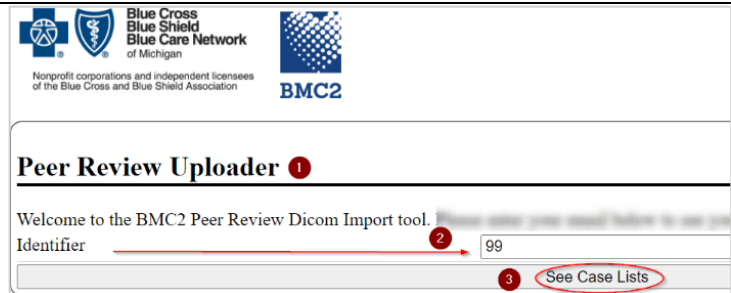
- After you have gathered and redacted the necessary case documentation and converted the documents to a pdf, the next step is to upload the files to the [BMC2 Peer Review Uploader](#) website. Uploading all documentation to the BMC2 Peer Review Uploader website is required. Notify the BMC2 Coordinating center via email when all files are uploaded.
 - Send your email to the coordinating center contacts.
 - Rebecca Fleckenstein (rflecke@med.umich.edu)
 - Sheryl Fielding (sfields@med.umich.edu)

BMC2 Vascular Surgery 2021 Peer Review Coordinator Upload Guidelines

- The coordinating center staff will review the documents for completeness after they are submitted.

Uploading Case Files to the BMC2 Peer Review Uploader Website

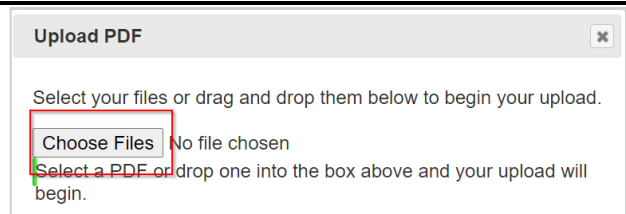
- Go to the [BMC2 Peer Review Uploader](#) website using Chrome, Firefox, or Microsoft Edge. Do not use Internet Explorer. You will not be able to upload files using Internet Explorer.
- Enter your site number in the **Identifier** field.
- Select **See Case Lists**.



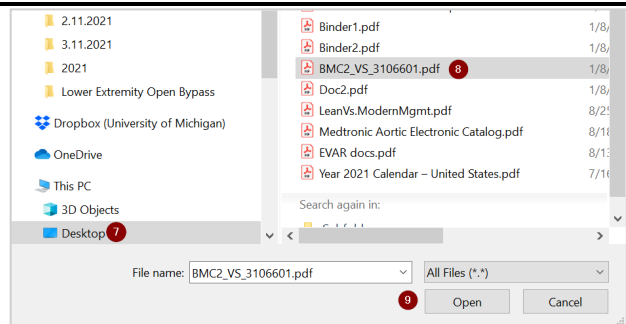
- A list of **Discharge ID#s** will display. Locate the **BMC2 DC ID#** under the **Case** column.
- Click on the **PDF icon** that corresponds to the **BMC2 DC ID#**. The **PDF icon** is on the right side of the screen.

Case	Status	Dicoms	PDF
3106601	Collecting		
3467507	Collecting		
2252203	Collecting		

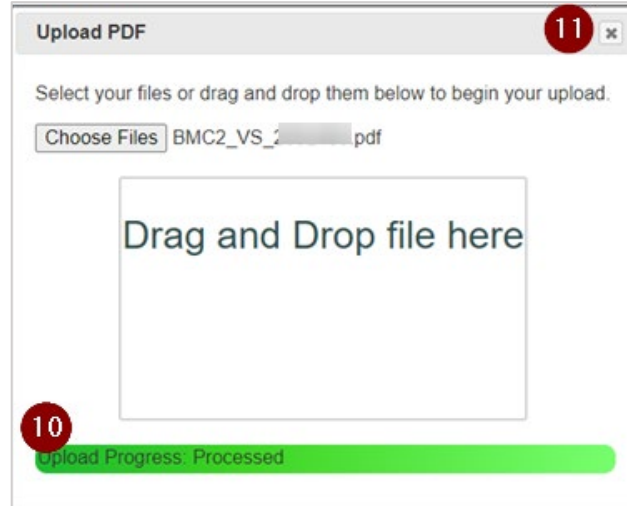
- The **Upload PDF** screen will display. Click on the **Choose Files** button.



- Locate where your file is on your computer.
- Click on the **file**.
- Select the **Open** button.



10. You will see the **Upload PDF** box again. You know that your file is being uploaded when you see the green bar and the word "Processed."
11. Click on the X on the top right corner of the screen.



12. Click on the reload icon  to refresh the page.

13. PDF Status: Uploaded will display.

PDF Status: **Uploaded**   

14. You can now upload another file, if applicable.

How to remotely redact a pdf for Epic users

1. Select the **patient** in Epic. Go to **Chart Review**.

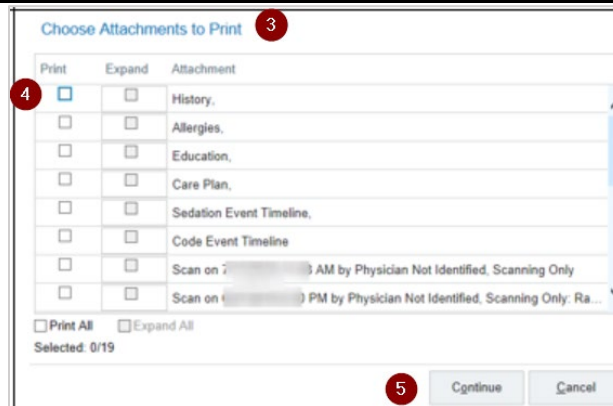
2. Click on the **Encounters** tab or **Notes** tab and double-click the **Admission (Discharge)** encounter. Click on the **printer icon** located at the top left side of the note.



3. The **Choose Attachments to Print** box will display.

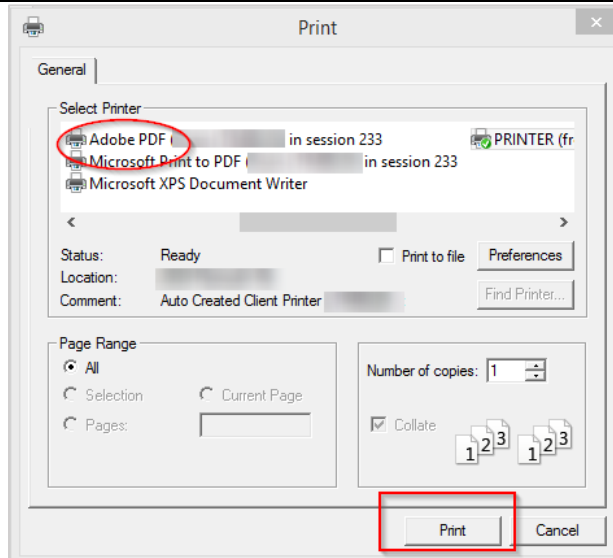
4. Click on the **box** under the **Print** column for each document you want in your pdf.

5. Select **Continue**.

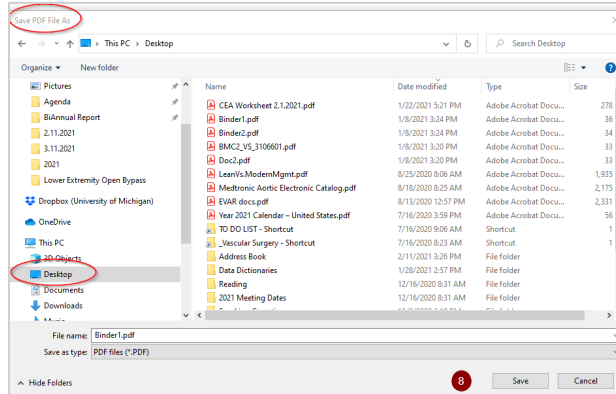


6. The **Print** box will display. Select **Adobe PDF**.

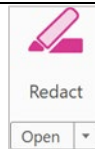
7. Select **Print**.



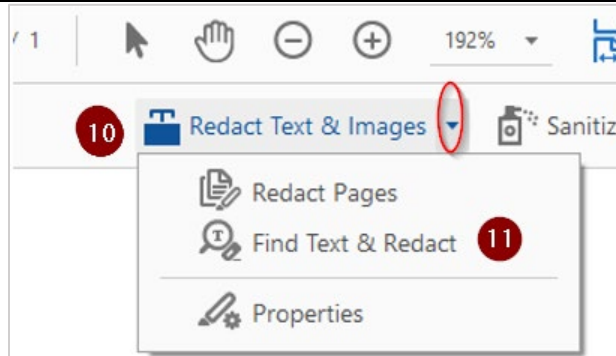
8. The **Save PDF File As** box will display. Save the pdf to your computer. You do not need to rename the file at this time.



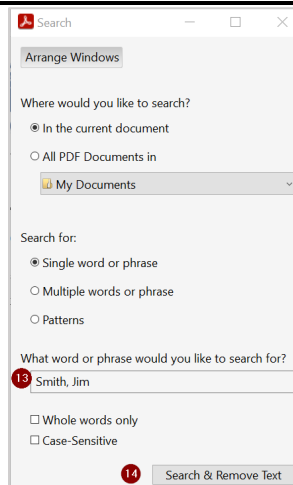
9. Open the pdf on your computer if it does not open. Select **Tools** on the top left of the page. Scroll down and choose the **Redact** icon.



10. You will see the document again. Click on the **arrow** next to **Redact Text & Images** at the top center of the page.
11. Select **Find Text & Redact**.
12. Select **OK**.



13. A box will display. Type in the word or phrase you want to redact in the **What word or phrase would you like to search for?** field. For example, type in Smith, Jim.
14. Click on the **Search and Remove Text** button.

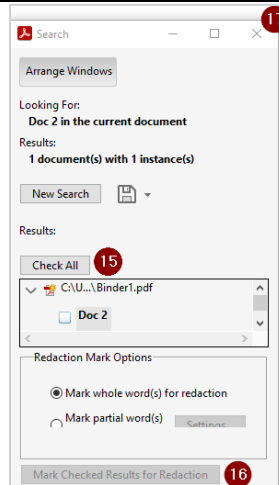


15. Select **Check All**.

16. Select **Mark Select Results for Redaction**.

Repeat **Steps 11 – 16** until all required data are redacted.

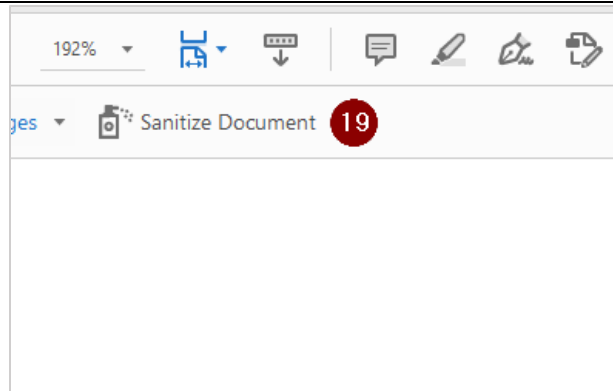
17. When you have redacted all required data, close the window.



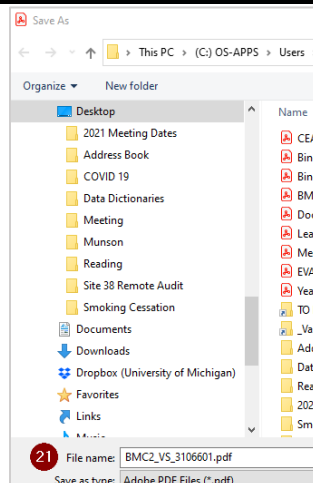
18. Scroll through the document to make sure that all data are redacted. If you find an item that needs to be redacted, click on the **Redact** icon on the page's right-hand side. Highlight the data you want to redact. A black box will appear over the data that you highlighted.

19. Click **Sanitize Document** at the top center of the page.

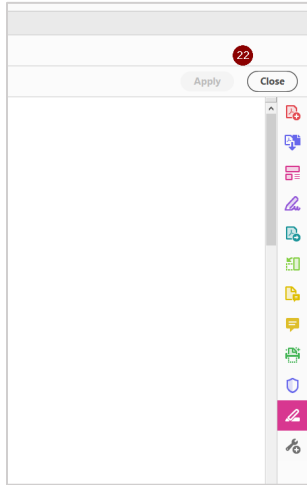
20. Click **OK**.



21. The **Save PDF File As** box will display. Type **BMC2_VS_[the DischargeID#]** in the **File name** field. Save the pdf to your computer.



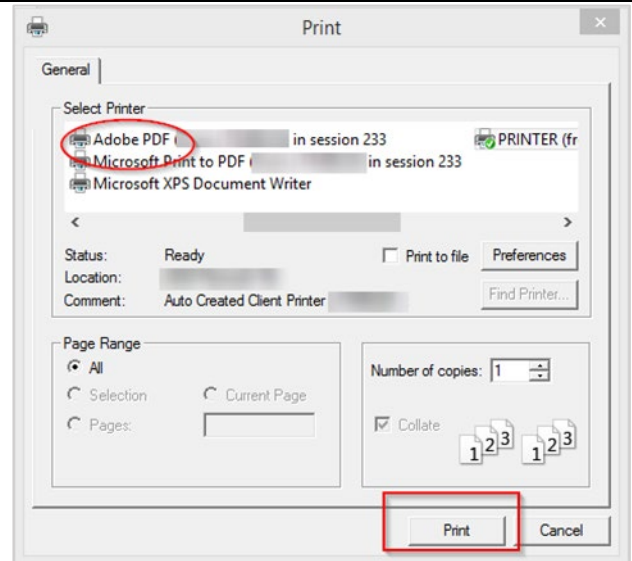
22. You will see the open pdf. Click the **Close** button on the top right side of the pdf. Close the pdf.



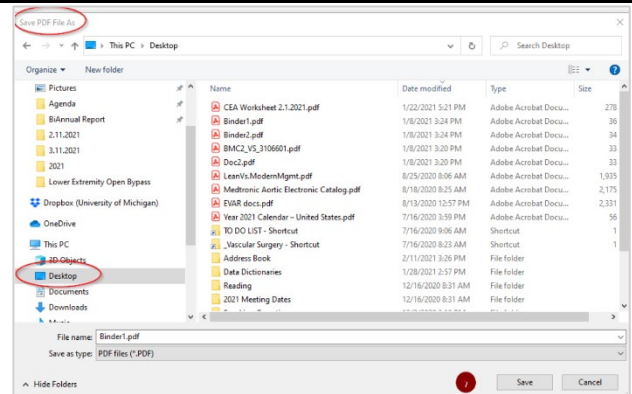
How to remotely redact a pdf for Cerner users

1. Select the patient in Cerner.
2. Open the document you want to save as a pdf.
3. Right-click on the document. Select **Print**.

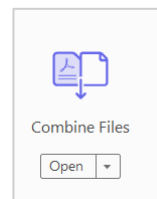
4. The **Print box** will display. Select **Adobe PDF**.
5. Select **Print**.
6. Click on **Continue**.



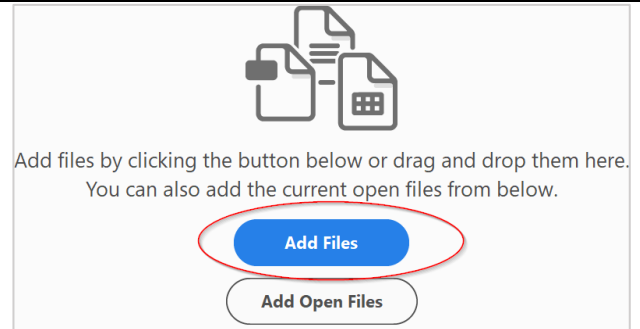
7. The **Save PDF File As** box will display. Save the pdf to your computer. Rename your file so that you what type of document it is. For example, rename your file H&P.



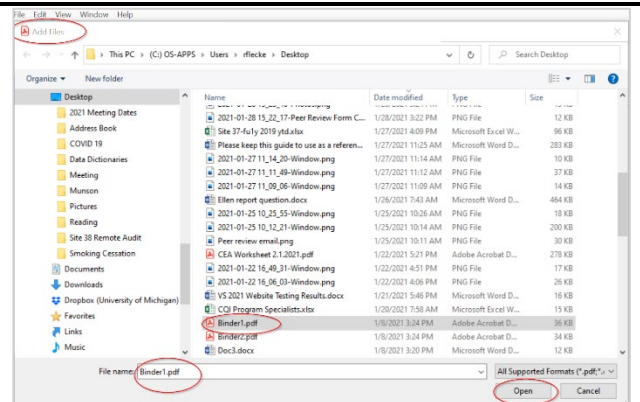
8. Repeat **steps 2 – 7** until you have saved all of the required documents on your computer.
9. Open one of the pdfs that you saved to your computer.
10. Select **Tools** on the top left of the page. Scroll down and choose the **Combine Files** icon.



11. Select **Add Files**.

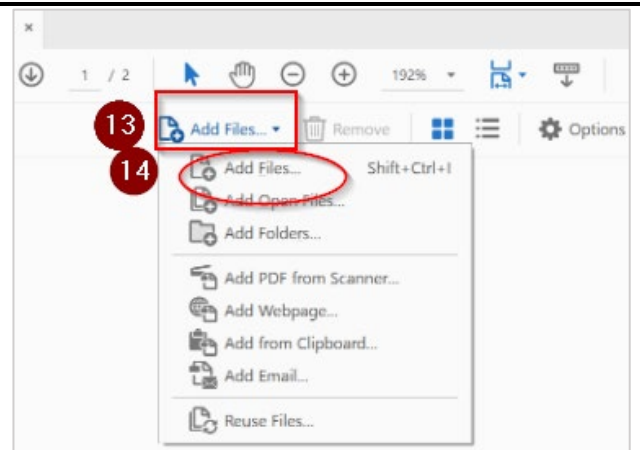


12. The **Add Files** box will display. Find the pdf you just opened on your computer. Click on the file one time. You will see the name of the file in the **File Name** box. Select **Open**.



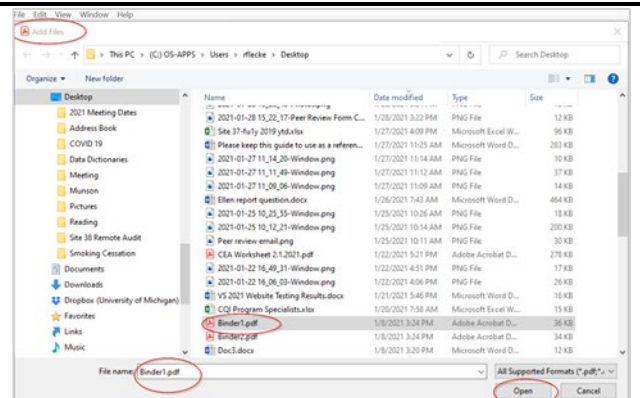
13. Select **Add Files** at the top of the page.

14. Select **+ Add Files**.



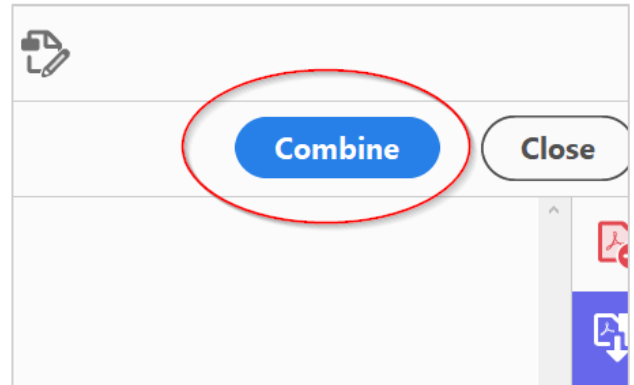
15. The **Add Files** box will display again. Find another pdf that you saved on your computer.

16. Select **Open**.

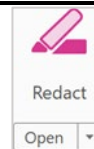


17. Repeat **Steps 13 – 16** until you have added all of the documents that you saved on your computer.

18. Select the **Combine** button at the top right side of the page. You have now combined all of your separate pdfs into one pdf.



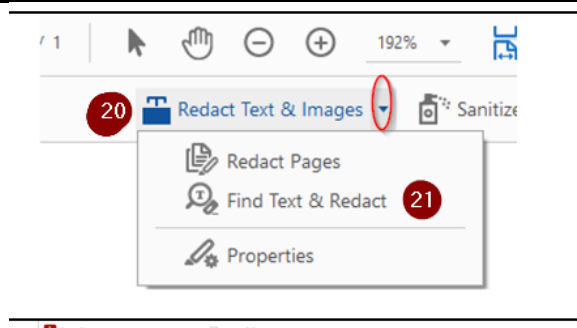
19. Select **Tools** on the top left of the page. Scroll down and choose the **Redact** icon.



20. You will see the document again. Click on the arrow next to **Redact Text & Images** at the top center of the page.

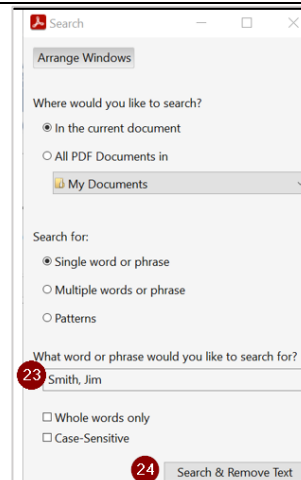
21. Select **Find Text & Redact**.

22. Select **OK**.



23. A box will display. Type in the word or phrase you want to redact in the **What word or phrase would you like to search for?** field. For example, type in Smith, Jim.

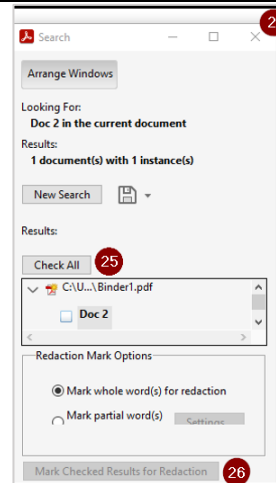
24. Click on the **Search & Remove Text** button.



25. Select **Check All**.
26. Select **Mark Checked Results for Redaction**.

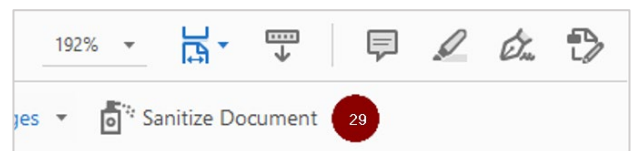
Repeat **Steps 21 - 26** until all required data are redacted.

27. When you have redacted all required data, close the window.

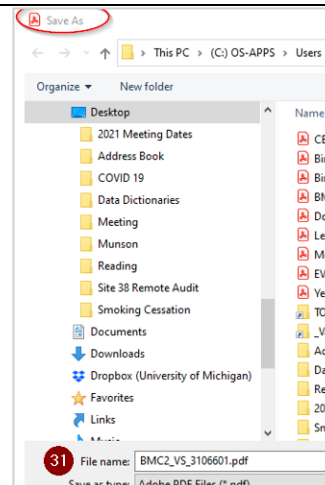


28. Scroll through the document to make sure that all data are redacted. If you find an item that needs to be redacted, click on the **Redact** icon on the page's right-hand side. Highlight the data you want to redact. A black box will appear over the data that you highlighted.

29. Click **Sanitize Document** at the top center of the page.
30. Click **OK**.



31. The **Save As** box will display. Type **BMC2_VS_[the DischargeID#]** in the **File** name field. Save the pdf to your computer.



32. You will see the open pdf. Click the **Close** button on the top right side of the pdf. Close the pdf.

