BMC2 PCI 2023B Peer Review Coordinator Upload Guidelines

Case Lists

The BMC2 Coordinating Center will post the case list to bmc2.org under the reports section on or prior to 7/4/2023. This list will contain the BMC2 discharge ID#s, NCDR PT ID, NCDR Other ID, Discharge date and procedure date. Coordinators will be required to upload the redacted documentation for **3 cases**. **The BMC2 PCI Case File Upload Deadline is 8/4/2023.** Sites will use the same case list for the External Peer Review and the Internal Peer Review.

To retrieve your case list:
- Sign into bmc2.org/member login <mark>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.</mark>
- Click on the **Downloads** link under the **Main Menu** on the left side of the screen.
- Click on **reports.**
- Click on the **peer_review** link.
- Click on the **2023B** folder.
- Download and 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 Kathleen at the Coordinating Center (734) 752-0927.

Required Documentation

Each assigned case should include the documentation listed below. Combine the documents into **one PDF file.** Name each file using this method: [**NCDR_ PTID_#].pdf.** For example, if the NCDR PT ID# is 1234567. You will name the file NCDR_PTID _1234567.

- History and Physical (H&P)
- Physician dictation of the procedure
- Stress test result summary leading to this procedure
    - do not include if not part of the indication for this procedure
    - do not include the ECG pages
- Anonymized coronary angiogram for the requested procedure (Name file with NCDR PT ID)
    - *Upload this file to dicom.bmc2.org in the "DICOM 1" section.*
- *Anonymized IVUS/OCT images if applicable*
    - *If not performed during this procedure, you will not need to upload any additional file*
    - *If performed but included in the same file as the coronary angiogram, upload as is, no need to separate files.*
    - *Upload this file to dicom.bmc2.org in the "Supplemental Images" section.*
- In addition to the required documentation, coordinators may choose to upload supplemental documents that are pertinent to the current episode of care and/or the procedural indication.

*The information uploaded should be as concise as possible and should include date of service.

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 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 physician, the hospital, or region

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.

We suggest you also remove metadata. See below for instructions related to the removal of metadata in Adobe Pro:

- Run Adobe Acrobat as an Administrator. To do this, simply right-click on the Acrobat Pro icon and select "Run as administrator."
- When the program loads, go to "File" and select "Properties."
- A window will appear. From here, select "Additional Metadata..."
- This will display the PDF's metadata. You will have the option to edit the data or remove it altogether.
- Choose to remove it, and then click "OK."
- After making the appropriate changes, it's important to remember to save your PDF.
- So go back to "File" and select "Save." You may also press "Ctrl + s" on your keyboard to achieve the same action.

Using Adobe Acrobat Pro for Redaction:

- Sign in to your EMR
- Epic users go to page 6 for instructions on how to remotely redact a pdf.
  - This method may or may not be available for you based on the EPIC structure at your facility.
- Cerner users go to page 9 for instructions on how to remotely redact a pdf.
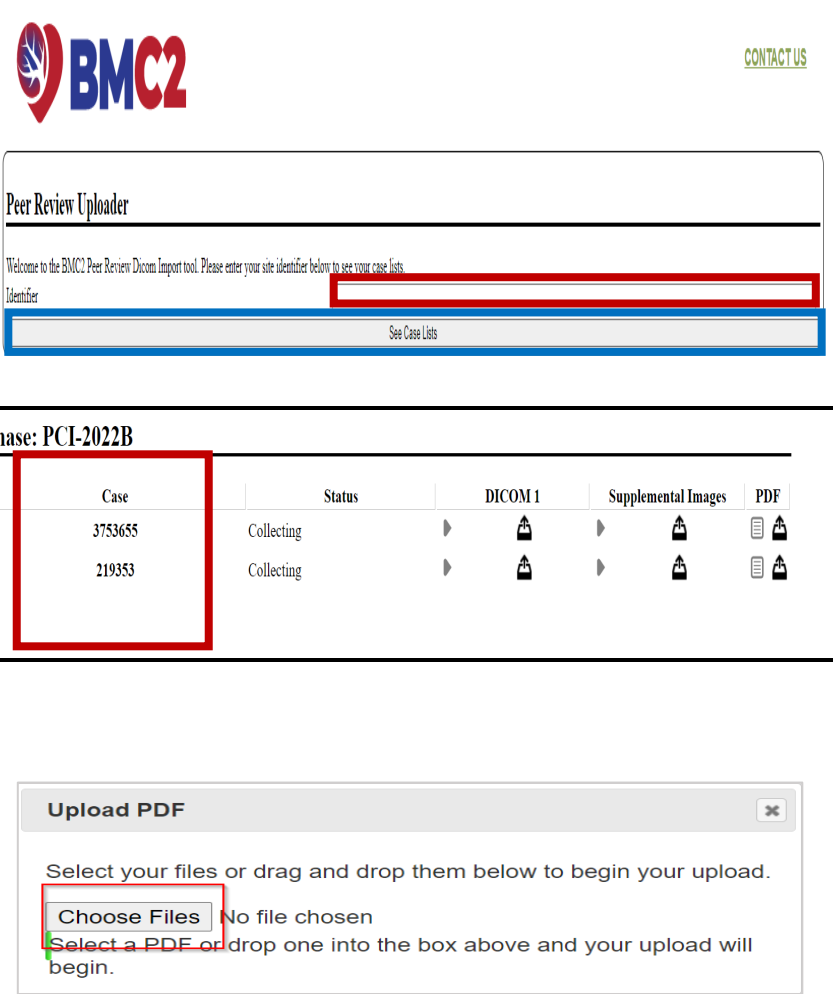
Manual Redaction:

- **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 may 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, converted the documents to a pdf, and obtained anonymized images from the cath lab, 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.
- Kathleen Frazier (frazieka@med.umich.edu) and Amy Shirato (shirato@med.umich.edu)
- The coordinating center staff will review the documents and images for: completeness, redaction, and correlation.
- Coordinators will be notified via email when their cases have been reviewed and the next steps they should take.

Uploading Case Files to the BMC2 Peer Review Uploader Website

1. 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.
2. Enter your site number in the **Identifier** field.
3. Select **See Case Lists**.

Peer Review Uploader

Welcome to the BMC2 Peer Review Dicom Import tool. Please enter your site identifier below to see your case lists.

Identifier

See Case Lists

4. A list of **Case ID#s** will display. Locate the **NCDR PT ID#** under the **Case** column.
5. Click on the **PDF icon** that corresponds to the **NCDR PT ID#. The PDF icon** is on the right side of the screen.

Phase: PCI-2022B

Case	Status	DICOM 1	Supplemental Images	PDF
3753655	Collecting			
219353	Collecting			

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

Upload PDF ✖

Select your files or drag and drop them below to begin your upload.

Choose Files   No file chosen

Select a PDF or drop one into the box above and your upload will begin.

7. Locate where your file is on your computer.
8. Click on the **file**.
9. Select the **Open** button.
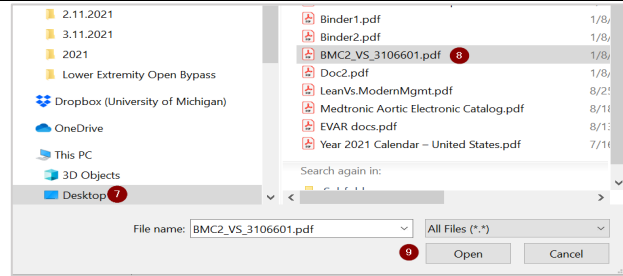
10. You will see the **Upload PDF** box again. You know that your file is being uploaded when you see the green bar and the word "Processed."
11. Click on the X on the top right corner of the screen.
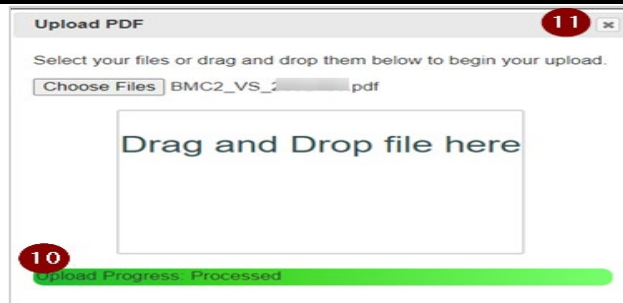
12. Click on the reload icon ⟳ to refresh the page.

13. PDF symbol is now black instead of grey. Click on that symbol to the left of the pdf upload symbol if you wish to review the file you have uploaded
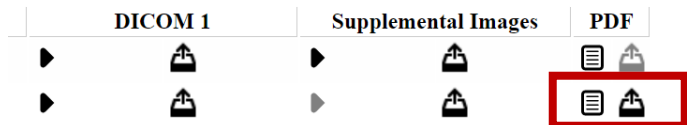
14. You will **upload DICOM angiogram** files the same way as the pdf, using the same case list number, but you will select the **DICOM 1 icon**. **Your internet speed is very important when uploading these files** because they are large. *Wired internet connections typically have faster speeds or those with limited devices running on the same connection.

15. The **Upload DICOM 1** Files screen will display. Since many sites will have the images stored on a CD ROM and may not be able to identify which files they should upload, we suggest using the "Drag and Drop" feature. By using this feature, the system will identify the appropriate dicom files to upload. You may also find this feature helpful with zip files that are slow to upload. For zip files, extract the files from the zip file and select "CTRL+A" then move all the files at once which should enable your files to upload more quickly.

    If you have a zip file. Unzip the file and click "CTRL+A" to select all the files. Then drag and drop those files. **YOU WILL NOT BE ABLE TO UPLOAD THE FILES ONE BY ONE OR UPLOAD A ZIP FILE THAT HAS NOT BEEN UNZIPPED.**

    Upload DICOM 1 (Dicom) Files ✕

    Select your files or drag and drop them below to begin your upload.

    Choose Files | No file chosen

    Drag and Drop file here

    Select your dicom files or drop them into the box above and your upload will begin. You can also select a .zip archive.

16. You will be able to see the progress of your DICOM 1 files uploading via the green bar and upload is complete when you see "Processed".

    Upload Dicom Files ✕

    Select your files or drag and drop them below to begin your upload.

    Choose Files | No file chosen

    Drag and Drop file here

    Upload Progress: Processed

17. Click on the play symbol to the left of the dicom upload symbol if you wish to review the images you have uploaded.

	DICOM 1		Supplemental Images		PDF	
▶	⬆	▶	⬆	🗎	⬆
▶	⬆	▶	⬆	🗎	⬆

18. You will also notice a column titled "Status". This column will be updated from "Collecting" to "Complete" once BMC2 reviews the entire submission (images and pdf) and considers it complete.

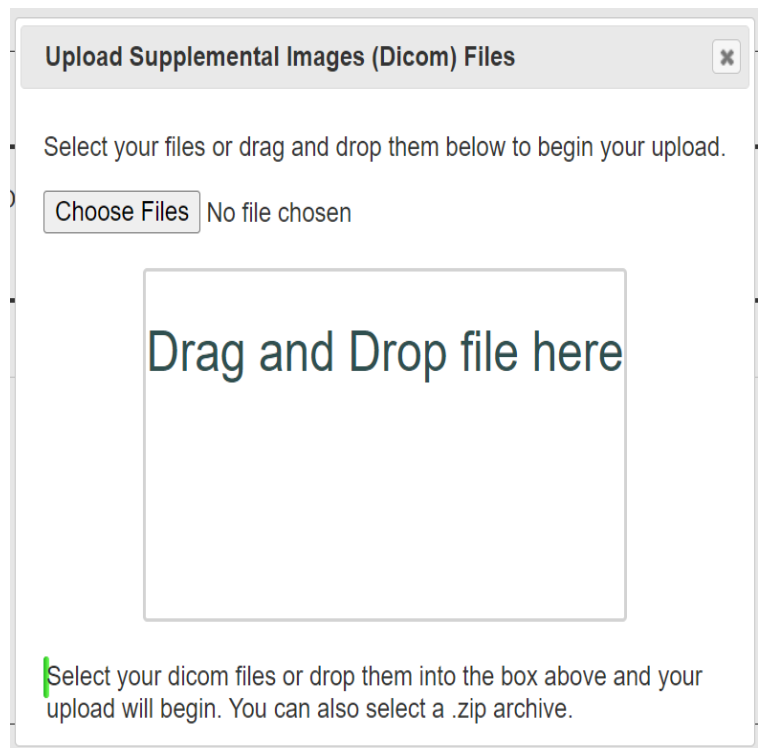 | Status | DICOM 1 | | Supplemental Images | | PDF | |
    |---|---|---|---|---|---|---|
    | Complete | ▶ | ⬆ | ▶ | ⬆ | 🗎 | ⬆ |
    | Collecting | ▶ | ⬆ | ▶ | ⬆ | 🗎 | ⬆ |

19. If you have a separate file for **IVUS/OCT** images upload You will upload these files the same way as the other files, using the same case list number, but you will select the **Supplemental Images icon**. **Your internet speed is very important when uploading these files** because they too are large. *Wired internet connections typically have faster speeds or those with limited devices running on the same connection.

	DICOM 1	Supplemental Images	PDF
▶	⬆	▶ ⬆	📄 ⬆
▶	⬆	▶ ⬆	📄 ⬆

20. The **Upload Supplemental Images** Files screen will display. Since many sites will have the images stored on a CD ROM and may not be able to identify which files they should upload, we suggest using the "Drag and Drop" feature. By using this feature, the system will identify the appropriate dicom files to upload. You may also find this feature helpful with zip files that are slow to upload. For zip files, extract the files from the zip file and select "CTRL+A" then move all the files at once which should enable your files to upload more quickly.

If you have a zip file. Unzip the file and click "CTRL+A" to select all the files. Then drag and drop those files. YOU WILL NOT BE ABLE TO UPLOAD THE FILES ONE BY ONE OR UPLOAD A ZIP FILE THAT HAS NOT BEEN UNZIPPED.

*You will be able to see the progress and review this file the same way you did the image file (see steps 16 & 17).

Upload Supplemental Images (Dicom) Files ✖

Select your files or drag and drop them below to begin your upload.

Choose Files No file chosen

Drag and Drop file here

Select your dicom files or drop them into the box above and your upload will begin. You can also select a .zip archive.
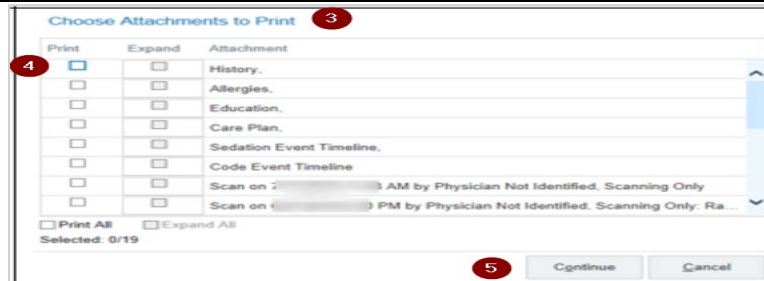
How to remotely redact a pdf for Epic users

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.
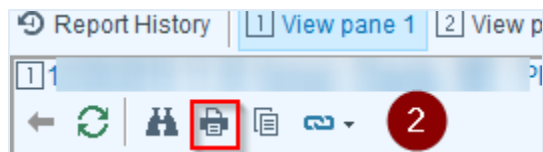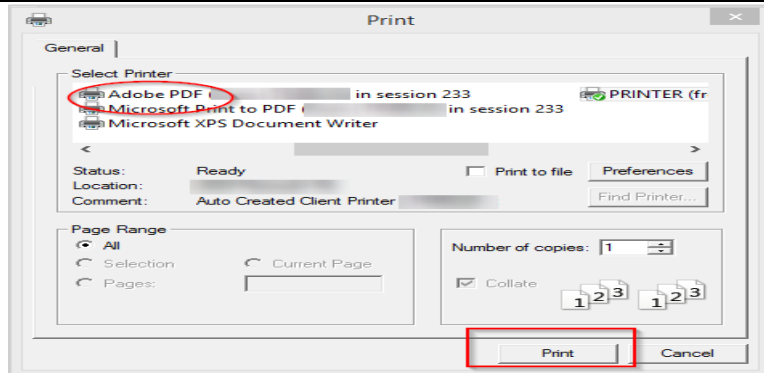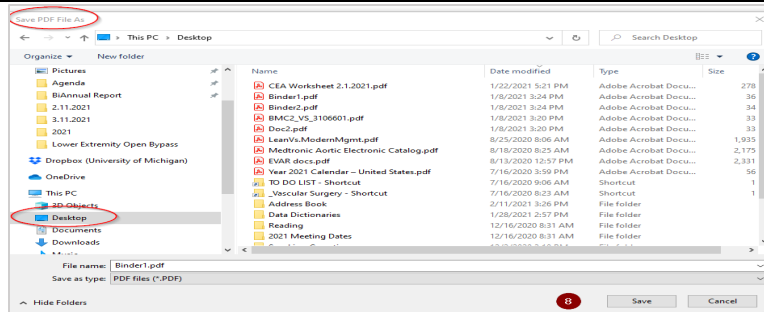
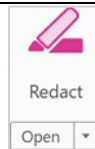|	
3. The **Choose Attachments to Print** box will display. 4. Click on the **box** under the **Print** column for each document you want in your pdf. 5. Select **Continue.**	
6. The **Print** box will display. Select **Adobe PDF**. 7. Select **Print**.	
8. The **Save PDF File As** box will display. 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**.	
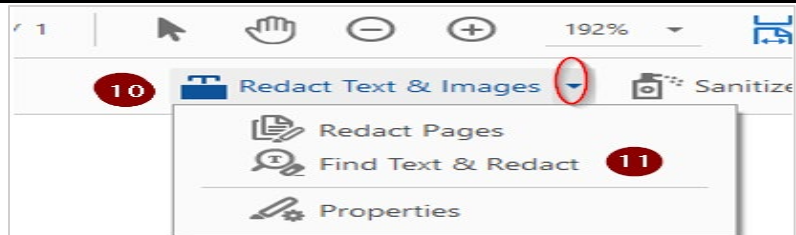
13. A box will display. Type in the word or phrase you want to redact in the **What word or phrase would you like to search for?** field. For example, type in Smith, Jim.
14. Click on the **Search and Remove Text** button.
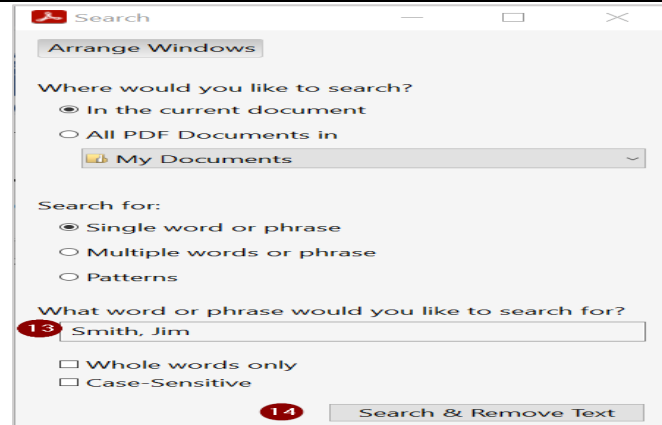
15. Select **Check All.**
16. Select **Mark Select Results for Redaction.**

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

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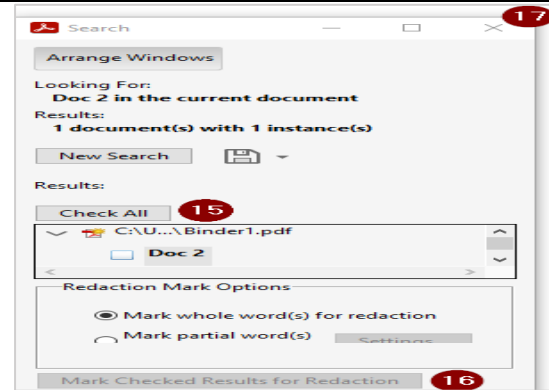
18. Scroll through the document to make sure that all data are redacted. If you find an item that needs to be redacted, click on the **Redact** icon on the page's right-hand side. Highlight the data you want to redact. A black box will appear over the data that you highlighted.

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

20. Click **OK**.
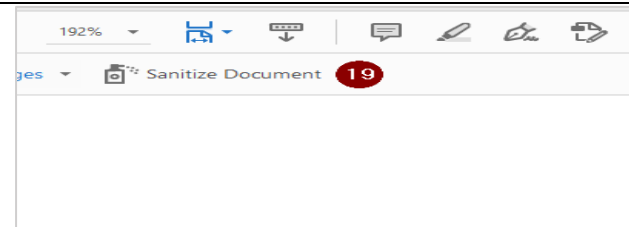
21. The **Save PDF File As** box will display. Type **BMC2_PCI_[the NCDR PT ID#]** in the **File name** field. Save the pdf to your computer.
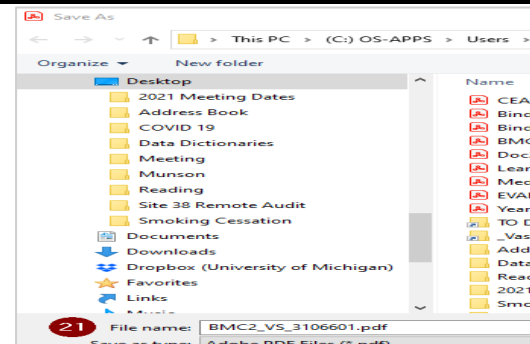
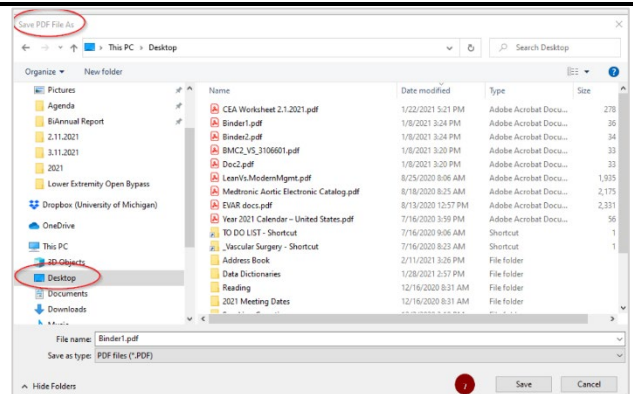|	
22. You will see the open pdf. Click the **Close** button on the top right side of the pdf. Close the pdf.	
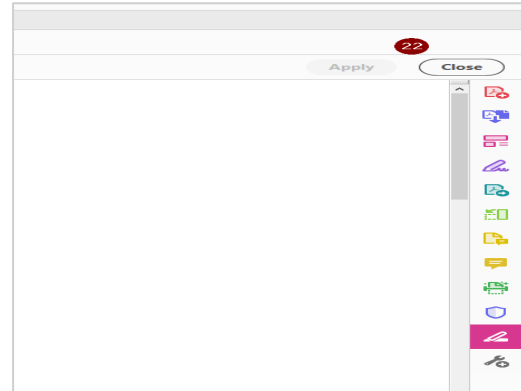
How to remotely redact a pdf for Cerner users

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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 the required documents on your computer. 9. Open one of the pdfs that you saved to your computer.	
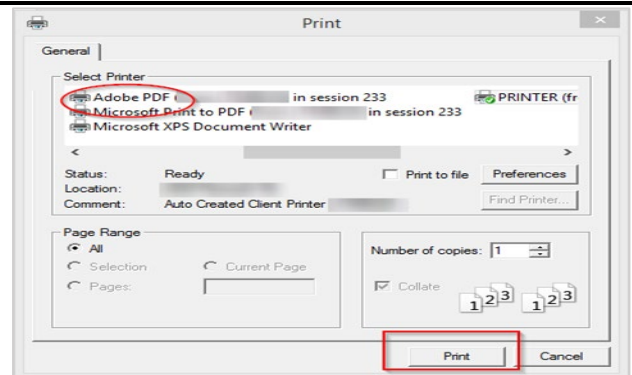
10. Select **Tools** on the top left of the page. Scroll down and choose the **Combine Files** icon.
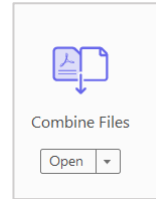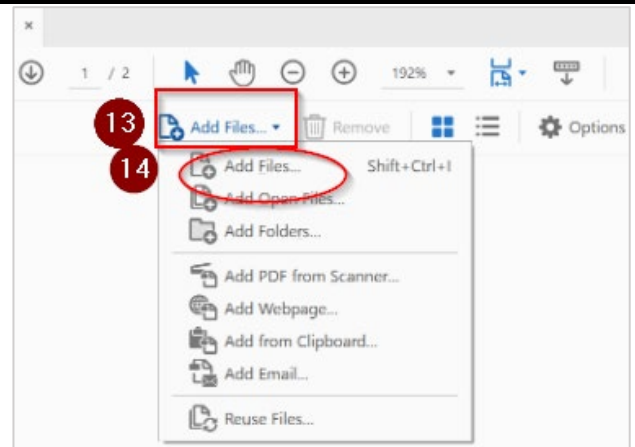
11. Select **Add Files**.
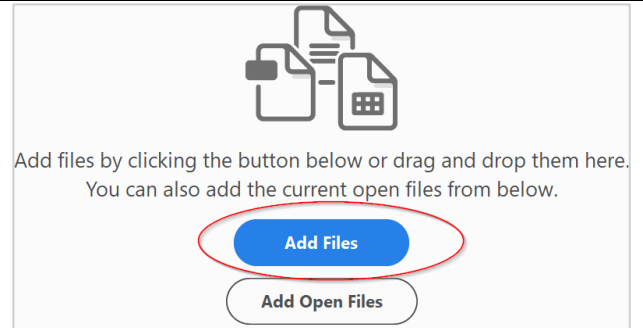
12. The **Add Files** box will display. Find the pdf you just opened on your computer. Click on the file one time. You will see the name of the file in the **File** Name box. Select **Open**.
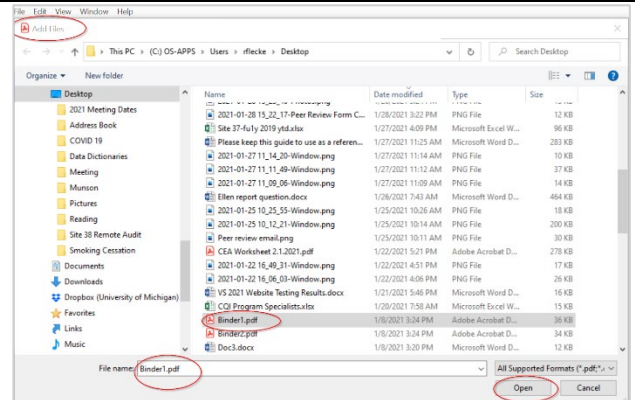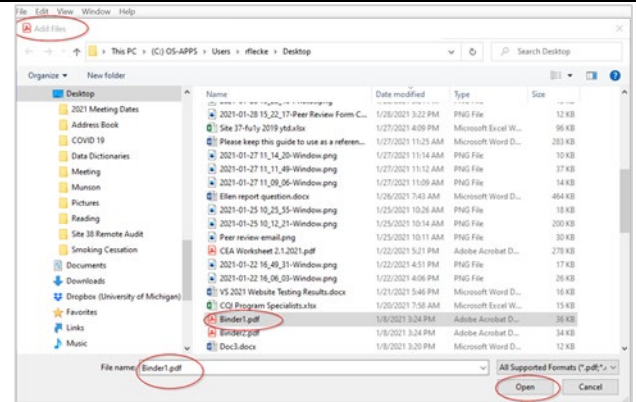
13. Select **Add Files** at the top of the page.
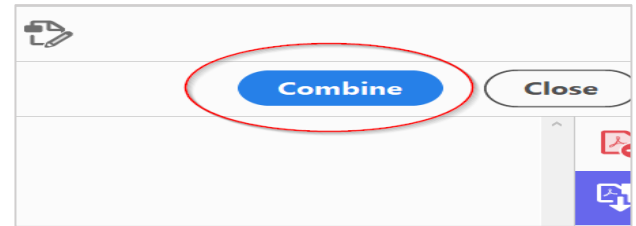14. Select **+ Add Files**.

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 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 your separate pdfs into one pdf.

19. Select **Tools** on the top left of the page. Scroll down and choose the **Redact** icon.
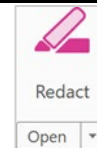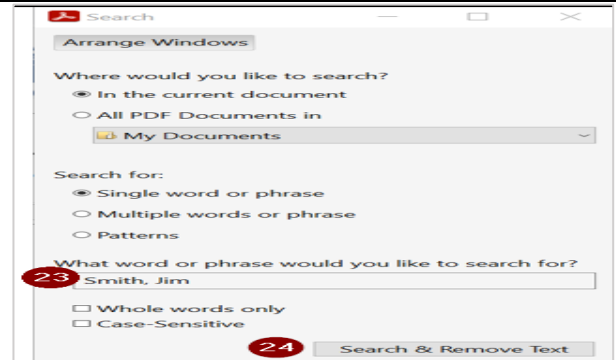
20. You will see the document again. Click on the arrow next to **Redact Text & Images** at the top center of the page.
21. Select **Find Text & Redact**.
22. Select **OK**.
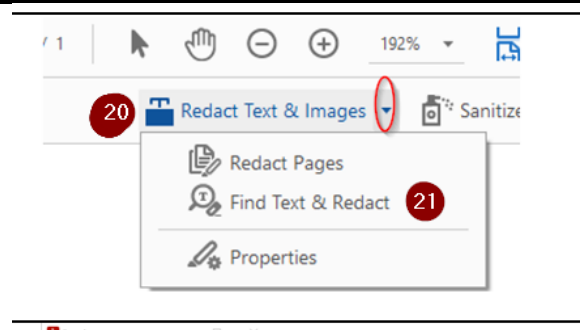
23. A box will display. Type in the word or phrase you want to redact in the **What word or phrase would you like to search for?** field. For example, type in Smith, Jim.
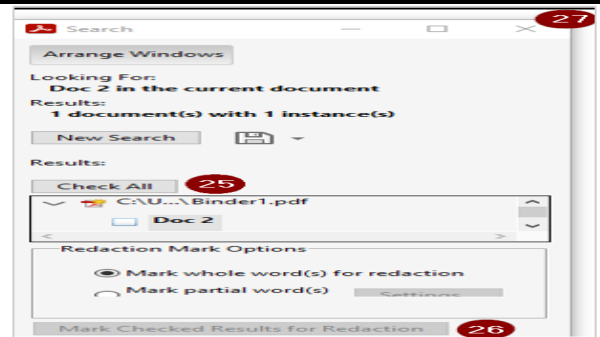24. Click on the **Search & Remove Text** button.

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

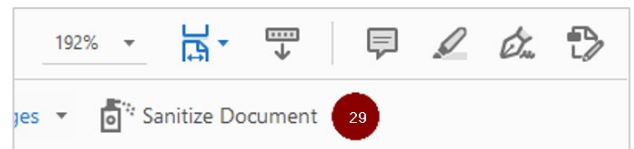Repeat **Steps 21 - 26** until all required data are redacted.

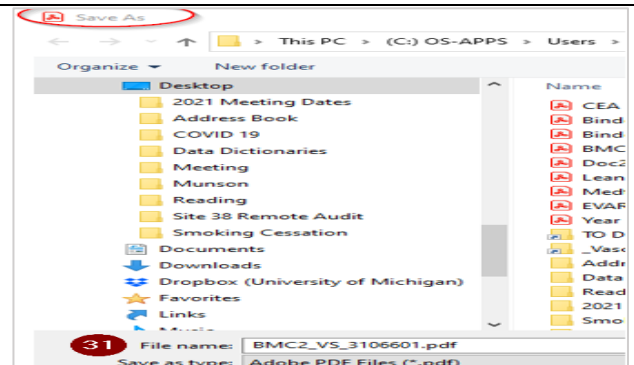27. When you have redacted all required data, close the window.

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_PCI_[the NCDR PTID#]** 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.