



Perinatal Grant Coordinator Guide

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INTRODUCTION

An introduction to what the position may entail.

The Perinatal Grant Coordinator position is a hybrid between a data analyst and an accountant as you will be handling the day-to-day analysis of both Obstetrics and Neonatal transfer data, and the accounting needing to submit both budget-keeping and new budgets to the state of Tennessee. This guide will walk you through how to manage all facets of the position, tips and tricks, as well as a contact sheet on who you can reach out to regarding individual items.

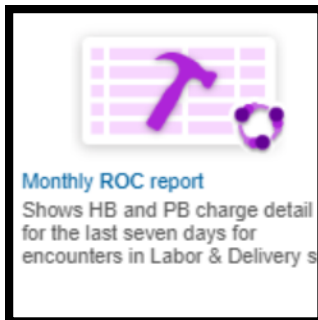
TRANSFER DATA - OB

An introduction on what the position may entail.

A great resource to get you started on how to collect the data needed for the state is the POR instruction guide which will be in the resource pages.

Below you will have a step-by-step guide on where to and how to report this data. Should you have any questions, reach out to Brandy Staszewski, Leslie Phelps or Jennifer Shelton.

01



The Monthly ROC report, found under Brandy Staszewski, is where you will begin.

- Input your date range, save and run the report.
- Once there, export the report as an excel to your C drive where you can create a dedicated folder for transfer data. Use an easy to remember password like: Erlanger 1.
- To clean the data:
 - go in and sort/filter the “STATUS” column from A-Z. From there, delete all that say, “ED Discharge”.
 - Sort/filter the “Chief Complaint” column from A-Z and delete all that say, “Cerclage”, “Scheduled C-Section” and “Schedules Induction”.

Continued

02



There are two additional reports that can aid in OB transfer data. The first is the “OB Transfer In- Transferring Facility.

- Press the arrow to run the report.
 - Once names have populated, click on “filter” and choose these filters:
 - Admit Date/Time (enter your dates)
 - Transferring Facility (click “Show all” and “has value).
 - Department (only choose BEH departments).
 - Export this report and cross reference names patients on your original report
-
- Now that you have your excel reports, have cross-referenced names between the transfer report and Monthly report, highlighting the noted transfer, open Epic to check the rest.
 - Not every transfer will be acknowledged on the transfer list and will need additional investigation. to do this:
 - Open “Patient Lookup” and begin searching patient medical record (MRN) or name.
 - If a chart requires you to break the class, write the justification as “state reporting”.
 - Got to “Notes” and search for the date listed as their admit date on the report.
 - Start with ED Provider note and move to H&P as needed.
 - Look for “patient presents to OBED” or “patient transfer from OSH”.
 - If it only states that the patient was transferred from an outside hospital (OSH), go into Media and search for a transfer or an ambulance report. Double click to open the report and find where the patient originated.
 - Keep searching through patient names and delete the ones who are not transfers.
 - In the provided excel, transpose all patients who are transfers and be sure to include the hospital and the county and state they were transferred from.

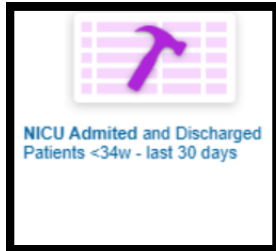
Continued

03

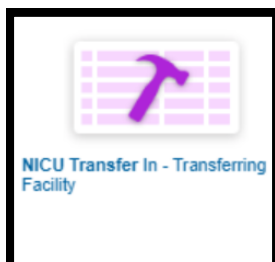
- Patient Care
 - 1a. - Report sent by Wynne Brady
 - Only use the BEH total for the quarter
 - 1b. - Found while doing transfer data.
 - This number can include those who are not transfers and patients who are from any state.
 - 1c. - Report sent from Sharon Maynard
 - 1d. - Found by analyzing transfer data
 - Only Tennessee residents apply
 - 1e. Found by analyzing transfer data
 - If in doubt on what the diagnosis is, ask management.
- Consultation
 - 2a. - Report sent by Renee Coppinger at ROC
- Education Hours
 - 3a. - Hours sent by educators each quarter
 - Be sure to add their combined hours in the main education tab on the excel spreadsheet and make sure there aren't any duplicates.
 - if 2 or more of the 3 OB educators are teaching together, make that a single line on the combined education tab to not duplicate hours or participants.
 - Add additional tabs and paste their individual education hours, one educator per tab.
- Education Participants
 - 4a. - Included in the report sent by educators each quarter.
 - OB educator's participants need to be unduplicated. This is achieved by educators indicating with classes are taught by 2 or more OB educators and ensuring only one educator's attendees are being counted when combining hours and attendees on the final POR.

POR instructions given to us by the state is the best guide to understanding everything needed to submit if there are any questions not answered in the guide or by Jill Rimmer / Heather Underwood.

01



- Collecting NEO data will be very different from OB data as you will need to cross-reference with the “green book”, now as long black book at the NICU’s front desk where all admitted patient information is located. Also make a copy of the “transfer list” that is in a red binder at the front desk.
- The best thing to do is first make a copy of those pages to cross-reference with the report listed.
- Once you have obtained the NICU admit pages, go to reports and search for “NICU Admit and Discharge”.
 - Search your date range if more than 30 days.
- Once here, export to excel and begin cross-referencing.
 - There will be times where a patient may show up on the Epic data and not the physical page. Keep that name and look up their information as needed.
- No patients will be deleted from the list as you will make note of all patients who are “inborn”, “outborn”, and what state they are from. This information is best found through looking up patient information on Epic as the book does not always have updated addresses for patients.



- To cross reference with the NEO physical TX List, you will go to “NICU - Transfer-Prior Month”
 - Only edit if more than 30 days has lapsed.
- Also pull “NICU Transfer in-Transferring Facility” to catch any that may have not been coded correctly.
 - 1. If the patient came from the BEH L&D or Nursery, that is not a transfer.
 - If the patient came from the ER, it is considered an “Outborn” transfer patient.
- You must also look at Discharge information. If the patient’s discharge disposition is “Transfer to Cancer center or hospital”, those also should be noted and check to see if they were transferred to a higher level of care.

TRANSFER DATA - NEO EXCEL BREAKDOWN

02

- Patient Care
 - 1a. - Found in Inpatient Admissions (NICU Inpatient Admissions Report)
 - 1b. - Found in Green Book and Inpatient Admissions
 - 1c. - Found in TX Center/Admission report and Green Book (Includes TX and CHED admits)
 - 1d. - Auto-calculated
- Follow up
 - a, b, c - All from Dr. Goins and “Jills NICU follow-up clinic report”
 - NICU Follow-up report (in Epic) has their visit reason
 - “New” pt seen in clinic
 - 2b - All pt seen in clinic
 - 2c - pt reasons for being seen in clinic
 - If a pt is seen for 2 issues (i.e. Low BW & BPD), they count in both columns.
 - It is normal for the total reasons to be more than the total patients.
- Transportation
 - 3a. - From Transport Log/TX Center
 - 3b. - From Transport log/TX Center
 - 3c. - Transport Log, NICU Transfers Prior Month & NICU Transfers In
 - 3d. - Auto-calculated
 - 3e. - NICU Transfer Log & Discharge Epic Report
 - - (includes “Children’s & Cancer Center” transfers).
 - 3f. - Transport Log & TX Center
- Education
 - 4a. - All of Jill’s hours
- Education Participants
 - 5a. - All of Jill’s participants

BUDGET KEEPING

An introduction on how to keep track of the budget.

The Perinatal Budget will look daunting but should go smoothly once you have an idea of where to collect all of the information. Below will be a guide on where and how to collect all necessary information.

- **Programs:**

- Strata
 - Pay Reports (8454 & 8455 pay period income)
 - MR GL (8454 & 8455 payments billed to the cost centers)
 - AP GL (8454 & 8455 payments with receipts submitted in Perceptive Content)

- **Bookkeeping:**

- Monthly review of Pay reports added to master report.
- Monthly review of MR & AP General ledgers, cross-referencing all submitted receipts/mileage/expenses with costs in:
 - professional education
 - Office Supplies
 - Postage
 - RentLease Copier
 - Etc...
- Filter and disregard all employee payments:
 - payroll
 - FICA
 - Dental
 - 403B
 - Etc...
- Once Filtered and matched, add them to the master expense report.

- **Using Strata:**

- Pay Reports
 - Log in to Strata and click "Analytics"
 - Scroll down to "Management Reporting" and select "Pay Report"
 - Keep all actions until MR Department
 - Click on MR Department, press the black X on the right, and click to magnifying glass to search your cost centers.
 - Type in "8454" or "8455" in the top right hand search bar.
 - Press enter and click "Apply".
 - Expand all lines by pressing the + on the left.
 - Make sure to expand all lines until there are no more +
 - Export this data to an excel and copy from there.

BUDGET KEEPING

An introduction on how to keep track of the budget.

- **Using Strata:**

- General Ledger (GL)
 - Log in to Strata and click “Analytics”
 - Scroll down to “Management Reporting” and select “MR GL Detail Filtered”.
 - In “Department”, click the magnifying glass and type in either “8454” or “8455”
 - Account can stay empty unless looking up a specific charge.
 - Fiscal month should be the month(s) you’re looking to analyze.
 - Fiscal year is the fiscal year you’re currently working in
 - Journal Number can stay empty unless looking up a specific charge.
 - Press Run Report and Export to Excel
 - From here, you can match charges to the documents you have received from staff or management on any travel, credit card charges, postage, etc.
 - ***Note*** If you find something without an item description and it has “Actuals Payroll” in the “Item Description”, you can move over to the AP General Ledger and see if there is a receipt attached to the charge.

- **Using Strata:**

- Actuals Payroll Journal (AP)
 - Log in to Strata and click “Analytics”
 - Scroll down to “Management Reporting” and select “MR AP Detail Filtered”.
 - In “Department”, click the magnifying glass and type in either “8454” or “8455”
 - Account can stay empty unless looking up a specific charge.
 - Fiscal month should be the month you’re looking to analyze.
 - Invoice Number can stay empty unless you have a specific charge you’re looking for.
 - Journal Number can stay empty unless looking up a specific charge.
 - Press “Run Report” and Export to Excel
 - From here, you can match charges to the documents you have received from staff or management on any travel, credit card charges, postage, etc.
 - ***Note*** If you find something without an item description and it has “Actual Payroll” in the “Item Description”, you can reach out to accounting and they may be able to supply to receipt.

PERINATAL GRANT EXPENDITURE TRACKING

- **Total Budget**
 - Each quarter is broken up by month. To help with the final gathering of information at the quarters end, it is helpful to maintain these fields the first week of each month after the general ledger is closed.
- **Salaries**
 - Each employee under the grant is listed and their monthly wage and benefits should be accounted for here on separate lines along with their total hours worked.
- **Q1 - Q4 Details**
 - These are dedicated tabs to keep track of each expenditure made through the grants, and their line-item description. This is imperative to keep track of as the state will audit the grant and ask for proof of purchase.
- **Supporting Documents**
 - This is a tab where you can insert the PDF file to the expense being accounted for on the Q1-Q4 Details tab. You can also add the short-hand name for that item (i.e Hotel Receipt = TR1 (Travel1)).
 - To add a PDF to excel
 - 1.) Single click the cell you want the item to go
 - 2.) Go to "Insert" on the top Action Bar (AB)
 - 3.) Click on "Text", second to last icon on the ridge of the AB.
 - 4.) Choose "Object", make sure it's on "Adobe Acrobat Doc" and click "Display as Icon" button to the right of the main box. Press "Okay".
 - 5. A document box will pop out; double click the pdf you want and adjust it to fit.

PERINATAL SALARY WORKSHEET

- **Master Sheet**
 - The Master Sheet outlines all grant paid employees and their overall quarterly salary and benefits.
 - These must remain broken up between cost centers.
- **Monthly Sheet**
 - Keeping track of the monthly sheet isn't totally necessary but makes it easier when going back to look at specific months.
- The remaining tabs will be every individual employee that has been grant paid in the year this worksheet is tracking.
 - Take the information from the "Pay Report" on Strata, save that spreadsheet to keep in that quarters files and also transpose individual pay reports into the matching grant employee's salary worksheet tab.
 - There will be instances where a lactation consultant may help in something grant related and will therefore be paid for by the grant during those hours.

NOTES AND NUMBERS

A FAQ page with notes and numbers for each component of the position.

TRANSFER DATA / POR

- If you have any questions about Transfer Data that isn't covered in this guide, Leslie Phelps, Brandy Staszewski and Jennifer Shelton may be able to help for Obstetrics and (Elizabeth) Jill Rimmer and Heather Underwood can help with Neonatal.
- The state contacts for the Perioperative Reports are:
 - Trang Wadsworth - Trang.Wadsworth@tn.gov
 - Margaret Major - Margaret.Major@tn.gov

HUMAN RESOURCES

- There are several different people to contact regarding the budget based on what item you're working on, strata if there are issues, and/or meditract for contracts.
 - Capital Purchases
 - Lori Hansel - Lori.Hansel@erlanger.org
 - Stephannie White - Stephannie.White@erlanger.org
 - **Capital Purchase:**
 - 1. Scan the document into Perceptive Content, (also known as ImageNow, or Check Request).
 - As long as you have requested access to Perceptive Content on your access information that included Epic, Kronos, etc, you can contact Copy Center to have them assign your printer the ability to scan documents directly into Perceptive Content (PC)/Check Request.
 - 2. Continue on page 11.
 - Contracts
 - Kathy Blevins - Kathy.Blevins@erlanger.org
 - Kay Hobbs - Kay.Hobbs@erlanger.org
 - COS
 - Cathy Casey - CCasey@cosonline.com
 - Credit Card Inquires
 - Cameron Crabtree - Cameron.Crabtree@erlanger.org
 - Disbursement
 - Carol Dickson - Carol.Dickson@erlanger.org
 - Sandra Kidd - Sandra.Kidd@erlanger.org
 - EPIC
 - Obstetrics: Brooke Fuchcar - Brooke.Fuchcar@erlanger.org
 - Neonatal: Cindy Kiemeyer - Cindy.Kiemeyer@erlanger.org

- General Accounting
 - Annette Hixon - Annette.Hixon@erlanger.org
 - Heather Penney - Heather.Penney@erlanger.org
- Legal
 - Martha Burgett - Martha.Burgett@erlanger.org
- Meditract
 - Abigail “Abby” Martin - Abigail.Martin@erlanger.org
 - Meditract is where you can find all of the contract ID’s you will need for specific check requests. If for some reason the vendor information is not showing up, you can email Abby and she will help.
- Payroll
 - Pam Kinsey - Pam.Kinsey@erlanger.org
 - Angela Boulware - Angela.Boulware@erlanger.org
- SimpleQI
 - Anastacia Volz - Anastacia.Volz@TIPQC.org
 - Alicia Mastronardi - Alicia.Mastronardi@TIPQC.org
 - SimpleQI is specifically for TIPQC Data keeping.
- Strata
 - Candace Martin - Candace.woods@erlanger.org
 - Morgan James - Morgan.James@erlanger.org

PERCEPTIVE CONTENT INFORMATION CONTINUED

- One-time Check Request:
 - There will be times you need to reimburse an employee for a personal expense. To do this through the grant:
 - 1.) Have the employees name, Employee ID, and mailing address send along with the invoice/receipt.
 - 2.) Send this information to Kathy Blevins and Kay Hobbs so they can enter their information into the system.
 - 3.) Once they email back that it is set up, you can continue reimbursing through Perceptive Content.
 - Continue to next page.
-

- Once in Perceptive Content, click on “WorkFlow” to find the document you uploaded and need to send on.
- Click on “Check Request”
 - Here you will find the document you uploaded
 - Double click to edit.

Check Request Worksheet

Search Vendor Name: **green** Invoice Number: 1509

Vendor Names: GREENSPACES Invoice Date: (MM/DD/YYYY) 04/24/2024

Vendor Addresses: 63 EAST MAIN STREET; ; CH/ Entry Date: 09/28/2024

Vendor Name: GREENSPACES Invoice Amount: 21884.17

Vendor Address: 63 EAST MAIN STREET

Freight:

Misc Amount:

SalesTax:

Capital Budget Number:

Special Notes: Maternity Home Grant

First Level Approver: Phelps, Leslie

Payment Message:

1099: NO

1099	Acct Number	Dept	Meditract Number	Amount	Business Unit	Description	Cap Project ID	Cap Activity ID	Cap Res Type	Job Code
	620542	8456	2002.11386	21884.17	EMC	Clients' home re				

Add Section Delete Section Validate

2 / 2 10%

- 1.) Click on “Show or Hide” to open the editor.
 - You can expand the page if needed by hovering at the edge and dragging.
- 2.) Type in at least 3 letters of the vendors name and hit TAB
 - Select the Vendor Name
 - Ensure the address is the same as the invoice address and select.
- 3.) Enter all of the invoice information, ensuring all is correct.
 - If the shipping is broken down as “freight”, be sure to put it in the freight second.
 - If it was not purchased by the hospital (105c3), be sure to add the sales tax in the correct box.
- 4.) Choose the correct person the check needs to go to.
 - It will either be Leslie Phelps or Heather Underwood, but for the grant is should first go to Leslie Phelps.
- 5.) Find the Account Number on the accompanying page.
- 6.) Write in the cost center where the invoice is being paid from.
 - Grant will be either 8454 (OB) or 8455 (NEO).
- 7.) If there is an existing contract with this company, you will need to know the Meditract number.
 - If you do not have access to view contract, you will need to send an email to Abby Martin (info on pg 11.)
- Once everything is filled in, take a screenshot for your own records just in case.
- 8.) Click Validate to make sure you didn't leave anything out.
- 9.) Click on “Route Forward”
 - Click “Index and Check Approver”
- Once routed forward, it will be sent to the approvers account, and on from there.

- Below, you can find the appropriate Account Number for the invoice you are putting into Perceptive Content.

Account Number	Account Name	Description
Supplies:		
810321	Gasoline	Vehicle gasoline only
810341	Building Main Supplies	General building supplies
810381	Cleaning Supplies	Supplies used for cleaning areas or equipment
810381	Film	Radiology film only
810381	Chemicals	Lab chemicals
810411	Medical Gases	Medical Gases
810461	Office Supplies	General office supplies
810471	Linen	All linen
810481	Instruments & Minor Equipment	Instruments and equipment only
810481	Postage	Includes certifications and all US Post Office Fees
810511	Paid Blood Donor	Blood products
810531	Patient Supplies	Any patient related supplies
810541	Purchase Rebates	Rebates from supplies purchased
810821	Implants	Items implanted in a patient
810841	Printing & Duplicating	copying done by out side vendors - copy center charges are in
810881	Books & Subscriptions	All books and professional subscriptions
810911	Inventory Adjustment	Inventory adjustment account
Purchased Services:		
820262	Physician Fees	Payments to physicians
820302	Consulting	Outside consultants
820322	Legal Fees	Outside legal fees
820332	Audit Fees	Financial audit fees
820352	Architect & Eng Fees	Outside architect and engineering fees
820482	Time & Mat Contract	Time & Materials contract with Janrx
820502	Dietary Charges	All dietary and food purchases
820512	Dietary Purchases	Cost of dietary supplies for EN cafeteria
820522	Unscheduled Maint	All unexpected repairs
820532	Advertising	Outside advertising costs includes legal ads and employment
820542	Purchased Services	Services purchased from outside vendors not covered by another

CH Cardio 8049

Recruiting
8415

ECMO #6164

PICU # 6128

Transplant 7157
" 7158*

Child Life 7094

Care Mobile - 834

Peds Ortho - 8061

NICU Transition
- 8171

FACE - 7094

Quality - 8417

Education - 7189

Hem/Onc - 6161

FEG - 7075

CHED - 6231