**QI Report Generation Process (every 2 weeks)**

1. Go to J:\PCORI NCRN\DRN OC\D. General DRN OC\QI Dashboard CC Queries Document
2. Copy most recent “CC Queries” excel file, updating with current date. Move old file to “2018-2019 PCORnet 2.0” folder
3. **For Sam/responsible party:** Using metadata search PowerShell script create new search, limiting search criteria to the “PCORnet” project with a submit date range covering the last two full months.
	1. Change all uppercase letters in filename to lowercase.
	2. Open the csv, and delete the “Description” and “ResponseMessage” columns
	3. Save csv, and Email to Christine Draper/responsible party
4. Login to the [DPM SAS server](https://lnapp053.hphc.org:8343/SASLogon/login?service=https%3A%2F%2Flnapp053.hphc.org%3A8343%2FSASStudio%2Fj_spring_cas_security_check) (if Chrome doesn’t work use Firefox or IE), and copy the SAS program in the “current” QI folder (updating the file name date)
	1. Use your Windows login credentials
5. Move all old files from the “current” QI folder into the “archive” folder
6. Upload the newly created metadata search csv to the QI “current” folder
7. Update the new SAS program (remember to save)
	1. Change “infile” to current metadata search csv filename
	2. add any new queries to end to query list
	3. comment out any queries no longer needed
8. Run the updated SAS program, be sure to check log for any errors
9. Download output file starting with “qi”, open and move “Query” column to be right-most column
10. Add output from “qi” csv to most recently created “CC Queries” excel (be sure to delete old output that is being replaced)
11. Apply formulas from additional columns as needed
12. Attach final csv to email, send to :
	1. Gretchen Sanders <gretchen.sanders@duke.edu>
	2. Mina Baqai <mina.baqai@duke.edu>
	3. Martha Summerlin martha.summerlin@duke.edu
	4. Zachariah Cole zachariah.cole@duke.edu
	5. (CC) Darcy Louzao, Ph.D. <darcy.louzao@duke.edu>
	6. (CC) Sturtevant, Jessica jessica\_sturtevant@harvardpilgrim.org
	7. (CC) Nagavedu, Kshema Kshema\_Nagavedu@harvardpilgrim.org