



CHR PCCA Setup

Last Updated: June 2025

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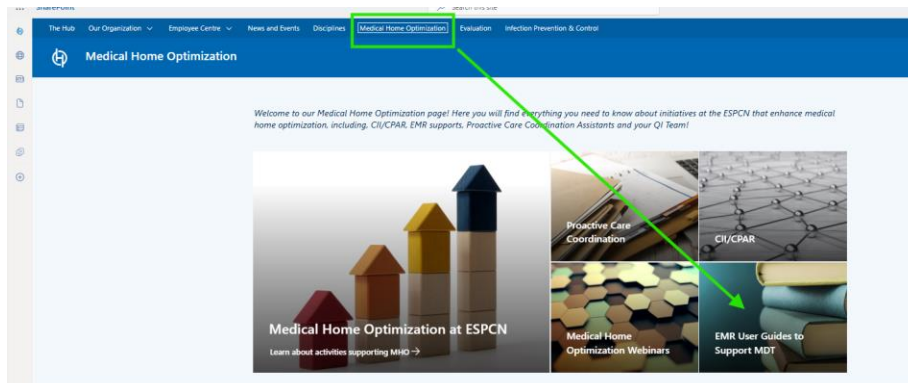
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RESOURCES

For more information about the CHR and how to retrieve the reports, tracking including the outreach list, there are resource guides & information shared in the ESPCN Hub.

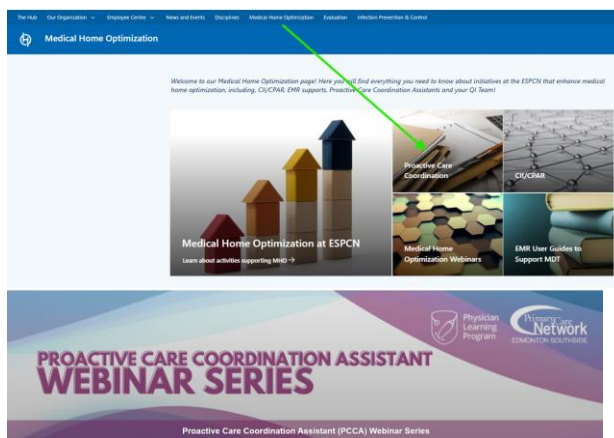
- EMR User Guide for MDT



- The PCCA Webinar videos

In 2024 Sept, ESPCN QI team organized a **“PCCA Webinar Series”**, it provides a comprehensive understanding of the PCCA Program and covers both technical and operational aspects across various components of the program. In the videos, our PCCA demonstrated how EMRs are used for effective implementation of them. We shall introduce this to the new PCCA as a self-learning platform for knowing more about the core elements and extending to know how EMRs are used practically.

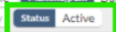
[Proactive Care Coordination Assistant \(PCCA\) Webinar Series - Edmonton Southside Primary Care Network | Edmonton Southside Primary Care Network](#)



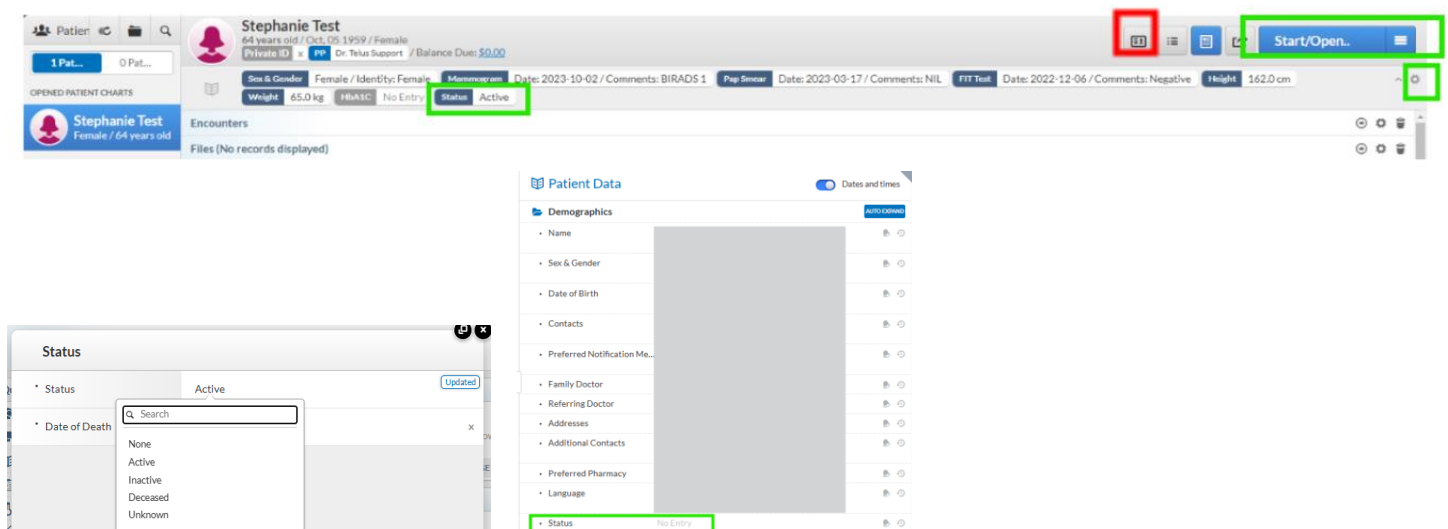
FEATURE HIGHLIGHTS

CHART STATUS

Patient Status

 is the indicator of patient is **panelled** when selecting **active**; otherwise, unpanelled by selecting others from the drop down menu. ****This is the key element to verify the *patient attachment to the Primary Care Provider is confirmed***

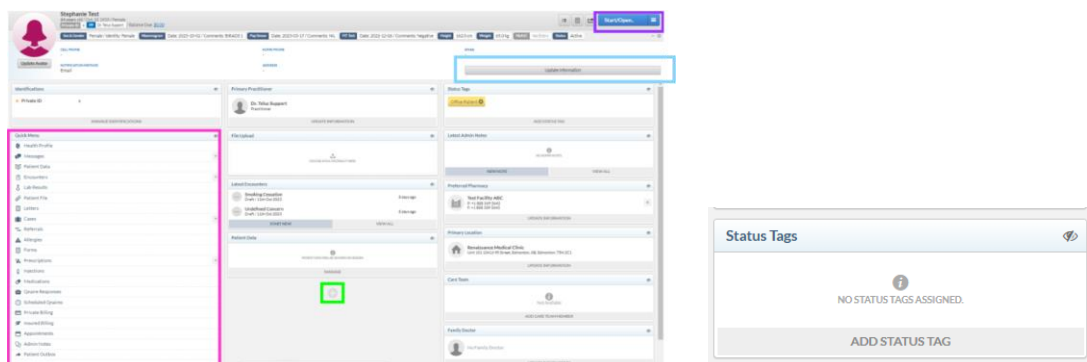
Click the  **gear** to manage Patient Data Widget and add your preferred widgets; or you may also update it by clicking  **Start/Open..** 



The screenshot shows a patient chart for Stephanie Test. The status is set to 'Active'. The Patient Data widget is visible, showing demographics and other information. The status is highlighted in green, and the Patient Data widget is highlighted in blue. The status is also highlighted in green in the Patient Data widget.

Status Tags

Apply the status tags to record additional information about the patient e.g. needs interpreter, always late, outstanding fees..... etc.

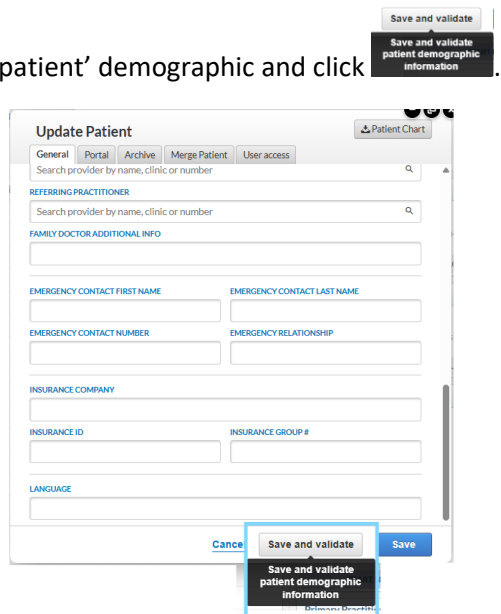
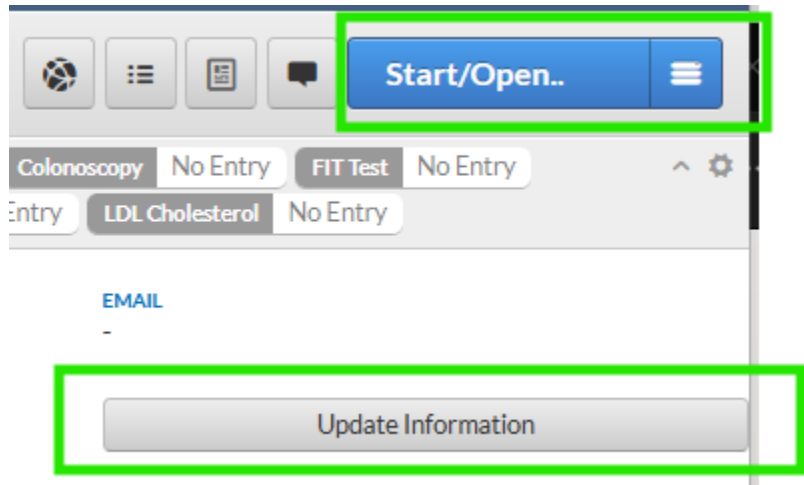


The screenshot shows the Status Tags interface. It includes a list of tags on the left, a main area for adding tags, and a button to add a new tag. The status tags are highlighted in green.

In the dashboard view you can add Status Tags by clicking on the **plus sign** . You can click and drag on the header to change the order. (refer to [Creating patient status tags | CHR Help centre](#) for details when needed)

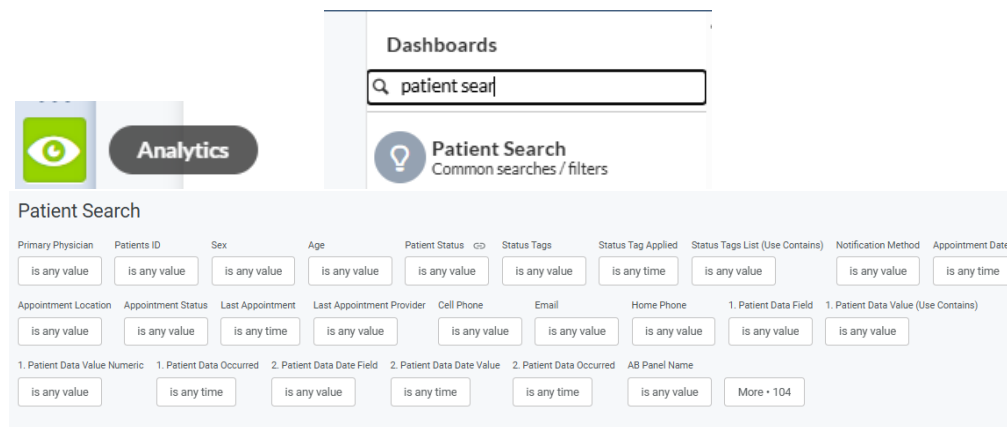
VALIDATION (aka Verification) - This is important to update our patients' contact information which help to stay connected.

Click **Start/Open..** to verify patient' demographic and click **Save and validate patient demographic information**.



ANALYTICS > PATIENT SEARCH

This is the analytics dashboards to view data from CHR in different reports. Select the respective filters according to the report requirements.



Dashboards

Search: patient search

Patient Search
Common searches / filters

Patient Search

Primary Physician: is any value
Patients ID: is any value
Sex: is any value
Age: is any value
Patient Status: is any value
Status Tags: is any value
Status Tag Applied: is any time
Status Tags List (Use Contains): is any value
Notification Method: is any value
Appointment Date: is any time

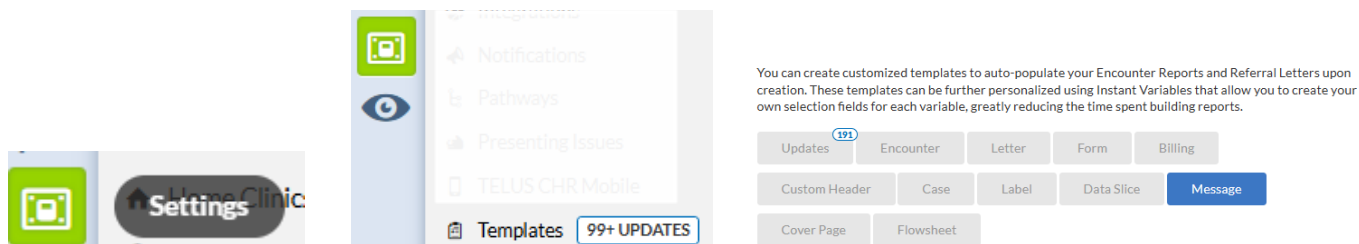
Appointment Location: is any value
Appointment Status: is any value
Last Appointment: is any time
Last Appointment Provider: is any value
Cell Phone: is any value
Email: is any value
Home Phone: is any value
1. Patient Data Field: is any value
1. Patient Data Value (Use Contains): is any value

1. Patient Data Value Numeric: is any value
1. Patient Data Occurred: is any time
2. Patient Data Date Field: is any value
2. Patient Data Date Value: is any time
2. Patient Data Occurred: is any time
AB Panel Name: is any value
More • 104

ESPCN TRACKING

1. Create the message templates

Go to 'Settings', select 'Templates', select 'Message', select 'Add Template'



Message Templates

Add Template

these are the standard Tracking report name

ESPCN – Tracking – Screening Reviewed by PCCA in the Last Week

ESPCN – Tracking – Pediatrics, No Appt. in 2 Years Outreach

ESPCN – Tracking – Adults, No Appt. in 3 Years Outreach

ESPCN – Tracking – 75+, No Appt. in 1 Year Outreach

ESPCN – Tracking – Chronic Disease, No Appt. in 1 Year Outreach

ESPCN – Tracking – Screening Due Outreach

ESPCN – Tracking – CPAR Conflict Outreach

***Due to the display window is short, here are examples of the templates name in shorter format for reference ***

- Outreach - Adult 3 years no visit
Quick Message: Disabled / Added 10 days ago
- Outreach - Peds 2 years no visit
Quick Message: save / close message / Added 10 days ago
- Outreach - 75+ no visit in 1 year
Quick Message: Disabled / Added 10 days ago
- Outreach - CD no visit in 1 year
Quick Message: Disabled / Added 10 days ago
- Outreach - Screening no visit in 1 year
Quick Message: Disabled / Added 10 days ago
- (no outreach) Screening reviewed by PCCA
Quick Message: Disabled / Added 10 days ago

an example of message body for reference

TEMPLATE NAME *

Outreach - Adult 3 years no visit

MESSAGE TITLE

Outreach - Adult 3 years no visit

MESSAGE BODY *

INSERT VARIABLE

B I T A

Call Status: [click here to edit....](#) on [click her to select the date](#) by ESPCN PCCA [REDACTED]

Pt was called for Adult outreach. When patient calls back, please confirm the following:

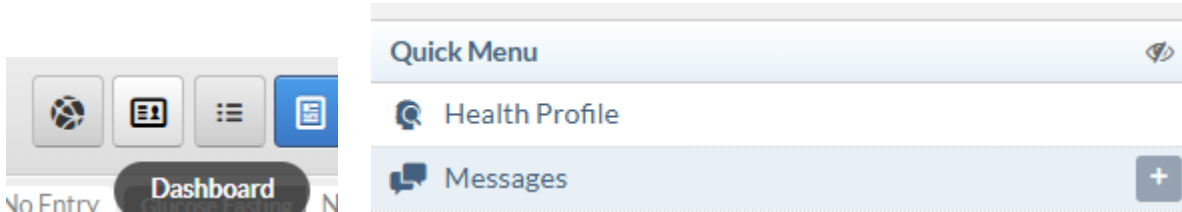
Primary provider is Dr. [REDACTED] per patient: [click here to edit....](#)
(if yes, click verification/date stamp in EMR and save)
If more than one family doctor, name the other physician (if any):
[click here to edit....](#)
(if pt decided other physician as primary provider, update the chart status and status tags, & complete this message)

- If pt confirmed Dr. [REDACTED] is primary provider, may suggest pt to book an appointment with Dr. [REDACTED]. Otherwise, inform the patient the ESPCN PCCA will contact pt again in next 2-3 months & complete this message.

2. Create a Message

For every patient who've been contacted (or left message or no answer or invalid contact info..etc), recommend creating a 'message' in the patient chart for tracking purpose.

Go to 'Dashboard', Quick menu > Messages, click '+'

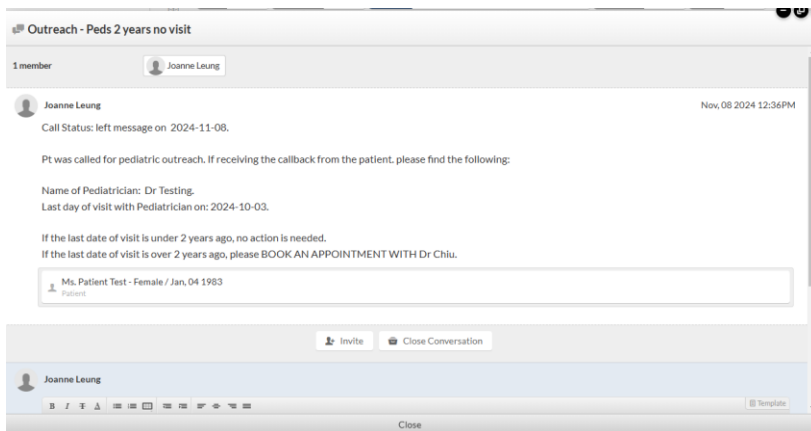


Click the 'template' icon, select the message template from the list, send to the respective user or PCCA

***for left message, recommend keeping the message with active status, do not close it until pt returns call)**



An example of the message



If PCCA is able to talk to patient and no follow up is required, click ‘close conversation’;

Outreach - Peds 2 years no visit

1 member

Joanne Leung

Joanne Leung

Nov, 08 2024 12:36PM

Call Status: left message on 2024-11-08.

Pt was called for pediatric outreach. If receiving the callback from the patient, please find the following:

Name of Pediatrician: Dr Testing.
Last day of visit with Pediatrician on: 2024-10-03.

If the last date of visit is under 2 years ago, no action is needed.
If the last date of visit is over 2 years ago, please BOOK AN APPOINTMENT WITH Dr Chiu.

Ms, Patient Test - Female / Jan, 04 1983

Patient

Joanne Leung closed this conversation a few seconds ago

3. Go to ‘Summary’, view the message created & saved.

Summary

Patient Data

Appointments

Lab Results (No records displayed)

Encounters

Messages

Created date

Recipient

Snooz...

Title

Sender

St...

Nov, 08 2024

Outreach - Peds 2 ye

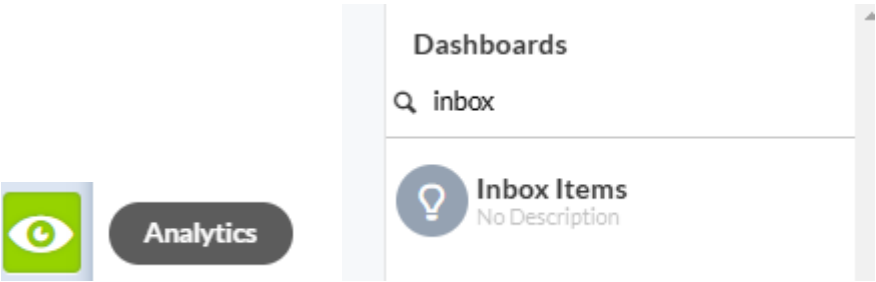
at's no visit

Closed

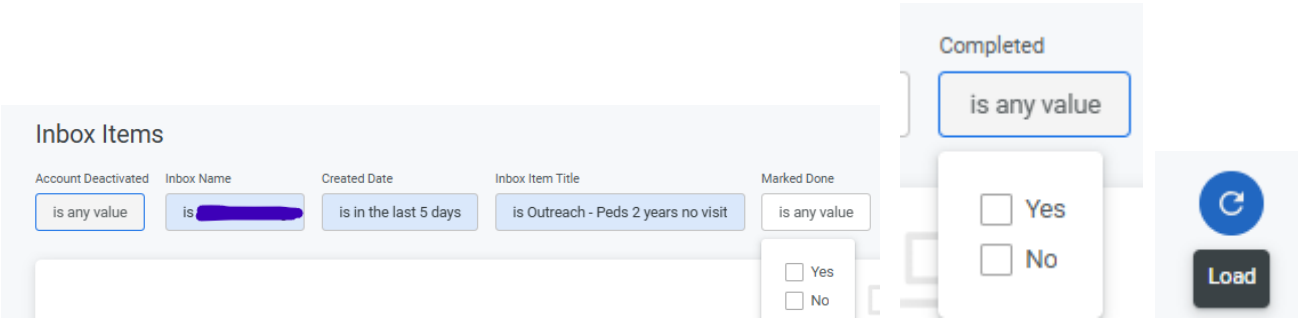
Messages

Sender	Recipient	Title	Created da...	Snooze until	S...
		Outreach - Peds 2 year...	Nov, 08 2024 12:36PM		Closed
		Outreach - Peds 2 year...	Nov, 08 2024 12:24PM		Open

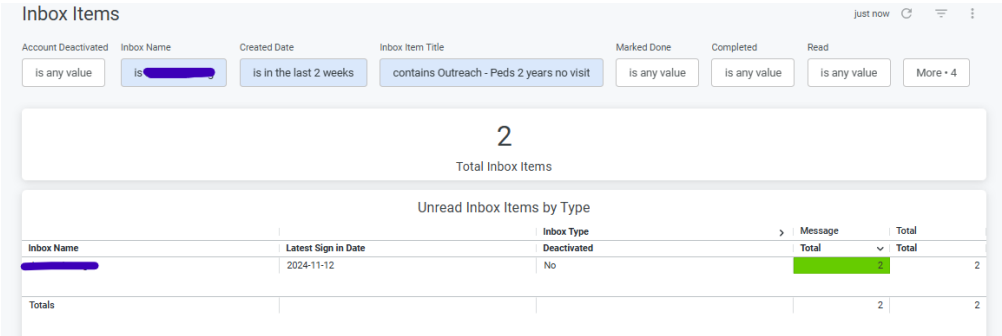
4. Go to 'Analytics', search 'inbox items'



- a. 'inbox name' is (select the respective user name)
- b. 'Created date ' (choose the time intervals from the drop down)
- c. 'Inbox Item Title' (select the template name used when creating the message)
- d. 'Marked Done' (select 'Yes' or 'No' or is any value)
- e. 'Completed' (choose 'Yes' or 'No' or is any value)
- f. click 'load'



It shows the Total Inbox Items = numbers of messages created per 'Inbox Item Title' selected



When necessary, click the number with green color for the full list of patients

Unread Inbox Items by Type

INBOX ITEMS (11 Filters) ▾

ID	Patient Ids	Patient Full Names	Patient Emails	Created Date	Sender Full Name	Title	Full Name	Urgent (Yes / No)
1		Patient Test		2024-11-08		Outreach - Peds 2 years no visit		No
2		Patient Test		2024-11-08		Outreach - Peds 2 years no visit		No

QUERY/REPORT TEMPLATES

Quarterly Reporting

ESPCN – Quarterly – Panel Full (Active Panel)

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	GD	Status Tags
is [REDACTED]	is any value	is any value	is in range [0, 130]	is Active		is active, and does not contain Deceased or ...

ESPCN – Quarterly – Panel Males

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	GD	Status Tags
is [REDACTED]	is any value	is Male	is any value	is Active		is active, and does not contain Deceased or ...

ESPCN – Quarterly – Panel Females

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	GD	Status Tags
is [REDACTED]	is any value	is Female	is any value	is Active		is active, and does not contain Deceased or ...

ESPCN – Quarterly – Panel Other Genders

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	GD	Status Tags
is [REDACTED]	is any value	is Other	is any value	is Active		is active, and does not contain Deceased or ...

ESPCN – Quarterly – Panel Age

- QUARTERLY Panel Age 0-9
- QUARTERLY Panel Age 10-19
- QUARTERLY Panel Age 20-29
- QUARTERLY Panel Age 30-39
- QUARTERLY Panel Age 40-49
- QUARTERLY Panel Age 50-59
- QUARTERLY Panel Age 60-69
- QUARTERLY Panel Age 70-79
- QUARTERLY Panel Age 80-89
- QUARTERLY Panel Age 90+

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	GD	Status Tags
is [REDACTED]	is any value	is any value	is in range [0, 9]	is Active		is active, and does not contain Deceased or ...

Verification Rate Queries

ESPCN – Quarterly – 6 Month VR # of Patients Verified

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is	is any value	is any value	is any value	is Active	is not Deceased or Inactive Patient or Left Pr...
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone
is any time	is any value	is note_signed or visit_completed	is in the last 6 months	is any value	is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased X

Inactive Patient X

Left Practice X

Long Term Care Patient X

ESPCN – Quarterly – 6 Month VR # of Appointments

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is	is any value	is any value	is any value	is Active	is not Deceased or Inactive Patient or Left Pr...
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone
is any time	is any value	is note_signed or visit_completed	is in the last 6 months	is any value	is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased X

Inactive Patient X

Left Practice X

Long Term Care Patient X

ESPCN – Quarterly – 3 Year VR # of Patients Verified

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is	is any value	is any value	is any value	is Active	is not Deceased or Inactive Patient or Left Pr...
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone
is any time	is any value	is note_signed or visit_completed	is in the last 36 months	is any value	is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased X

Inactive Patient X

Left Practice X

Long Term Care Patient X

ESPCN – Quarterly – 3 Year VR # of Appointments

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is	is any value	is any value	is any value	is Active	is not Deceased or Inactive Patient or Left Pr...
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone
is any time	is any value	is note_signed or visit_completed	is in the last 36 months	is any value	is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased X

Inactive Patient X

Left Practice X

Long Term Care Patient X

Vitals & Lifestyle Queries

ESPCN – Quarterly – Eligible 18+

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

is Allan Chiu

is any value

is any value

is >= 18

is any time

is Active

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

ESPCN – Quarterly – BP Due (Screened)

search ‘Preventive Care Compliance Preventive Care’/Compliant = Screened

Preventive Care Report

Primary Practitioner

Patient ID

Patient Status

Patient Status Tag

Appointment Date

Appointment Status

Latest

is Allan Chiu

is any value

is Active

is not Deceased or Inactive Patient or Left Pr...

is any time

is any value

is :

Data source: Patient Data → Vitals → Blood Pressure → Systolic & Diastolic

Blood Pressure

Preventive Care Report

4m ago

Primary Practitioner

Patient ID

Patient Status

Patient Status Tag

Appointment Date

Appointment Status

Latest Appointment Date

More • 36

is

is any value

is Active

is not Deceased or Inactive Patient or Left Pr...

is any time

is any value

is any time

BP (18+, Annual)

Primary Practitioner	Total Patients	Compliant	Compliant %	Non-Compliant	Non-Compliant %
1 [redacted]	879	600	68%	279	32%
Totals	879	600	68%	279	32%

ESPCN – Quarterly – Height & Weight Due (Screened)

search ‘Preventive Care Compliance Preventive Care’/Compliant = Screened

Preventive Care Report

1h ago

Primary Practitioner

Patient ID

Patient Status

Patient Status Tag

Appointment Date

Appointment Status

Latest Appointment Date

More • 36

is Allan Chiu

is any value

is Active

is not Deceased or Inactive Patient or Left Pr...

is any time

is any value

is any time

Data source: Patient Data → Vitals → Height

Height

Height (18+, Once)

Primary Practitioner	Total Patients	Compliant	Compliant %	Non-Compliant	Non-Compliant %
1 Allan Chiu	879	844	96%	35	4%
Totals	879	844	96%	35	4%

ESPCN – Quarterly – Exercise Assessment Due

search ‘Preventive Care Compliance Preventive Care’/Compliant = Screened

Preventive Care Report

1h ago

Primary Practitioner: is Allan Chiu, Patient ID: is any value, Patient Status: is Active, Patient Status Tag: is not Deceased or Inactive Patient or Left Pr..., Appointment Date: is any time, Appointment Status: is any value, Latest Appointment Date: is any time, More + 36

Exercise Assessment

Data source: [Health Profile](#) → [Social History](#) → [Lifestyle](#) → [Physical Activity Updated](#)

Primary Practitioner		Total Patients	Exercise Assessment (18+, Annual)			
			Compliant	Compliant %	Non-Compliant	Non-Compliant %
1	Allan Chiu	879	0	0%	879	100%
Totals		879	0	0%	879	100%

ESPCN – Quarterly – Tobacco Assessment Due

search ‘Preventive Care Compliance Preventive Care’/Compliant = Screened

Preventive Care Report

2h ago

Primary Practitioner: is Allan Chiu, Patient ID: is any value, Patient Status: is Active, Patient Status Tag: is not Deceased or Inactive Patient or Left Pr..., Appointment Date: is any time, Appointment Status: is any value, Latest Appointment Date: is any time, More + 36

Tobacco Use Assessment

Data source: [Health Profile](#) → [Social History](#) → [Substance Use](#) → [Smoking Updated](#)

Primary Practitioner		Total Patients	Tobacco Use Assessment (18+, Annual)			
			Compliant	Compliant %	Non-Compliant	Non-Compliant %
1	Allan Chiu	879	0	0%	879	100%
Totals		879	0	0%	879	100%

Screening Queries

ESPCN – Quarterly – Pap Due

search ‘Preventive Care Compliance Preventive Care’/Non-Compliant = Due

Preventive Care Report

2h ago

Primary Practitioner: is Allan Chiu, Patient ID: is any value, Patient Status: is Active, Patient Status Tag: is not Deceased or Inactive Patient or Left Pr..., Appointment Date: is any time, Appointment Status: is any value, Latest Appointment Date: is any time, More + 36

Pap Test

Data source: 1. [Patient Data](#) → [Preventive Care](#) → [Pap Smear](#) → [Date](#).
2. [Files](#) (see or adjust file names in the [PAP File Name](#) dashboard filter)
3. [Forms data is pulling into the Ordered Column](#) (see or adjust form names in the [PAP Form Name](#) dashboard filter)
4. [Lab results](#) (see or adjust lab test names in the [PAP Lab Name](#) dashboard filter)

Primary Practitioner		Total Patients	Pap Test (F, 25-69, 3 Years)			
			Compliant	Compliant %	Non-Compliant	Non-Compliant %
1	Allan Chiu	192	46	24%	146	76%
Totals		192	46	24%	146	76%

ESPCN – Quarterly – Pap Eligible

search ‘Preventive Care Compliance Preventive Care’/Total Patients

Preventive Care Report

Primary Practitioner Patient ID Patient Status Patient Status Tag Appointment Date

is Allan Chiu is any value is Active is not Deceased or Inactive Patient or Left Pr... is any time

Pap Test

- Data source: 1. **Patient Data** → Preventive Care → Pap Smear → Date.
 2. **Files** (see or adjust file names in the [PAP File Name](#) dashboard filter)
 3. **Forms data is pulling into the Ordered Column** (see or adjust form names in the [PAP Form Name](#) dashboard filter)
 4. **Lab results** (see or adjust lab test names in the [PAP Lab Name](#) dashboard filter)

Pap Test (F, 25-69)

	Primary Practitioner	Total Patients	Compliant
1	Allan Chiu	192	46
Totals		192	46

ESPCN – Quarterly – Mammo Due

search 'Preventive Care Compliance Preventive Care'/Non-Compliant = Due

Preventive Care Report

Primary Practitioner Patient ID Patient Status Patient Status Tag Appointment Date Appointment Status Latest Appointment Date

is Allan Chiu is any value is Active is not Deceased or Inactive Patient or Left Pr... is any time is any value is any time More • 36

Mammography

- Data source: 1. **Patient Data** → Preventive Care → Mammogram → Date
 2. **Files** (see or adjust file names in the [Mammogram File Name](#) dashboard filter)
 3. **Forms data is pulling into the Ordered Column** (see or adjust form names in the [Mammogram Form Name](#) dashboard filter)

Mammography (F, 45-74, 2 Years)

	Primary Practitioner	Total Patients	Compliant	Compliant %	Non-Compliant	Non-Compliant %
1	Allan Chiu	183	51	28%	132	72%
Totals		183	51	28%	132	72%

ESPCN – Quarterly – Mammo Eligible

search 'Preventive Care Compliance Preventive Care'/Total Patients

Preventive Care Report

Primary Practitioner Patient ID Patient Status Patient Status Tag Appointment Date Appointment Status Latest Appointment Date

is Allan Chiu is any value is Active is not Deceased or Inactive Patient or Left Pr... is any time is any value is any time More • 36

Mammography

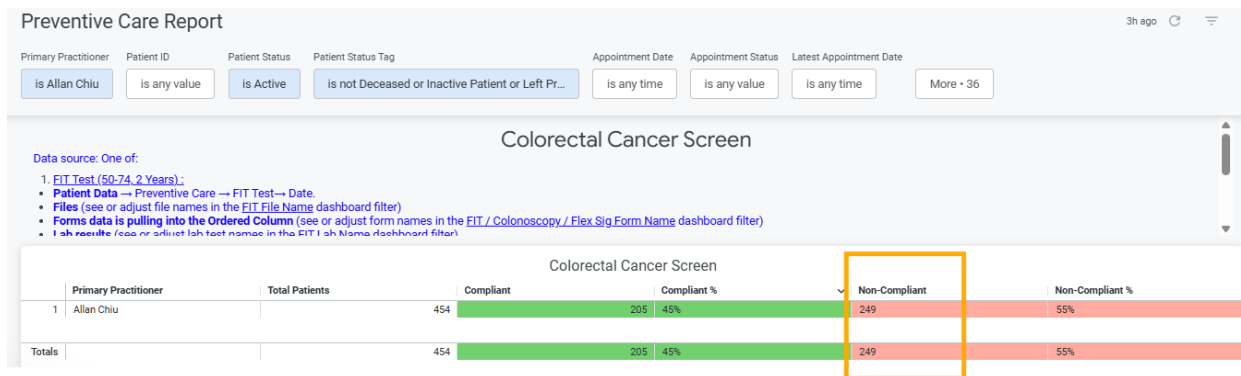
- Data source: 1. **Patient Data** → Preventive Care → Mammogram → Date
 2. **Files** (see or adjust file names in the [Mammogram File Name](#) dashboard filter)
 3. **Forms data is pulling into the Ordered Column** (see or adjust form names in the [Mammogram Form Name](#) dashboard filter)

Mammography (F, 45-74, 2 Years)

	Primary Practitioner	Total Patients	Compliant	Compliant %	Non-Compliant	Non-Compliant %
1	Allan Chiu	183	51	28%	132	72%
Totals		183	51	28%	132	72%

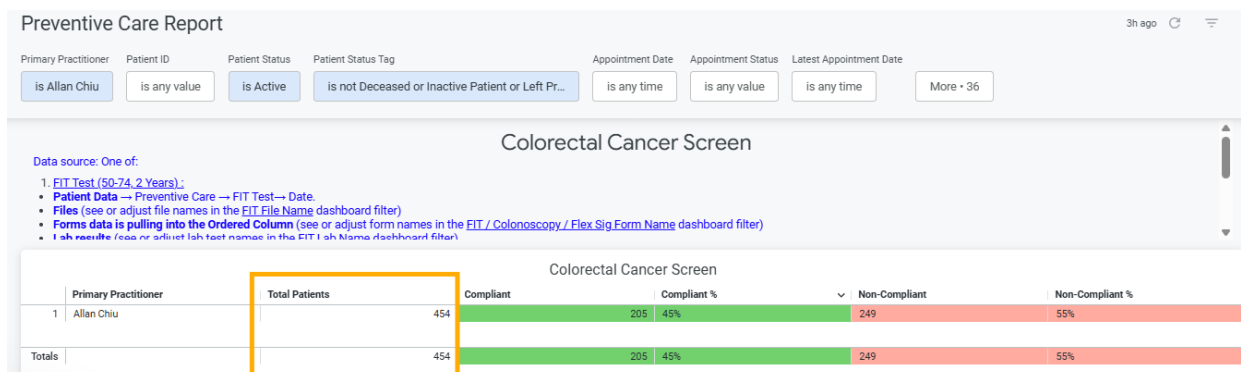
ESPCN – Quarterly – CRC Due

search 'Preventive Care Compliance Preventive Care'/Non-Compliant = Due



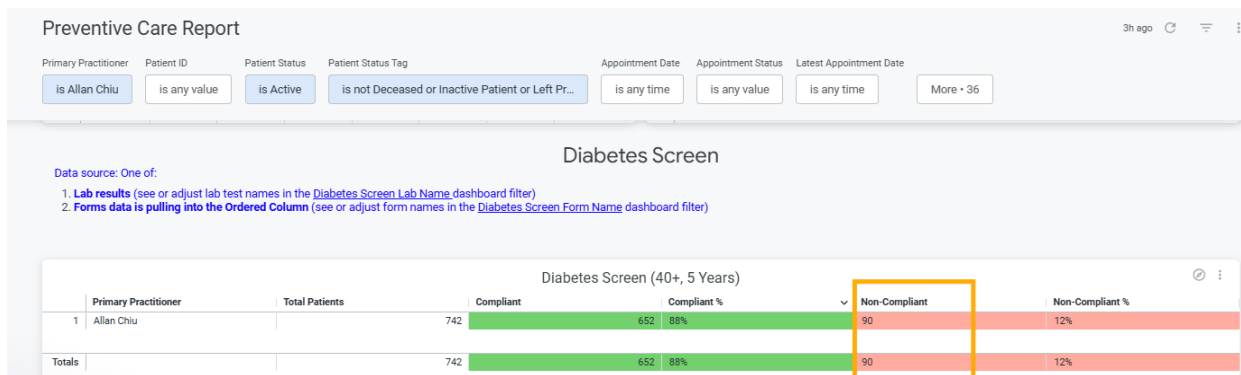
ESPCN – Quarterly – CRC Eligible

search 'Preventive Care Compliance Preventive Care'/Total Patients



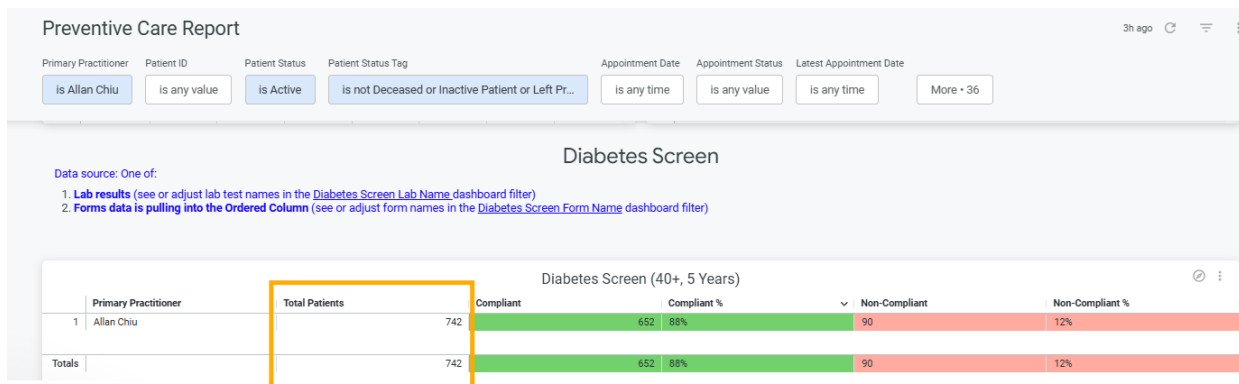
ESPCN – Quarterly – Diabetes Due

search 'Preventive Care Compliance Preventive Care'/Non-Compliant = Due



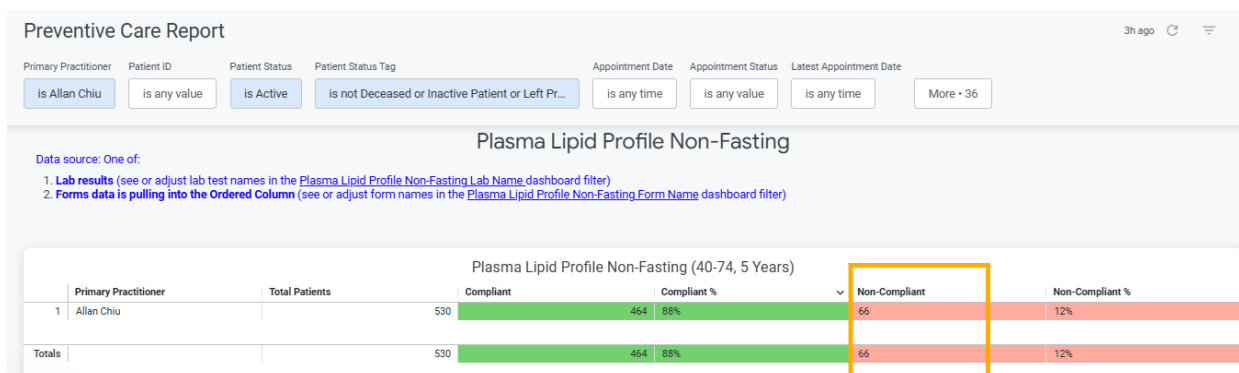
ESPCN – Quarterly – Diabetes Eligible

search 'Preventive Care Compliance Preventive Care'/Total Patients



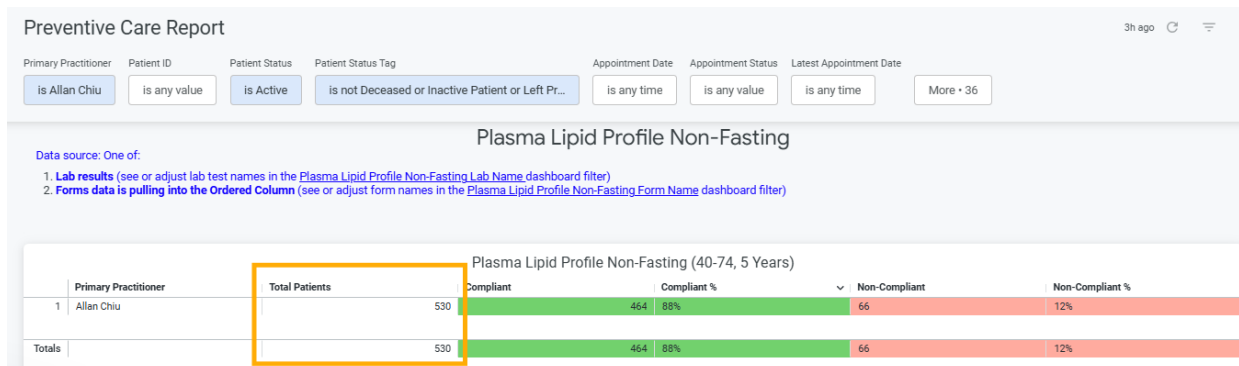
ESPCN – Quarterly – Lipids Due

search 'Preventive Care Compliance Preventive Care'/Non-Compliant = Due



ESPCN – Quarterly – Lipids Eligible

search 'Preventive Care Compliance Preventive Care'/Total Patients



ESPCN – Quarterly – CV Risk Due

Part 1

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

Status Tags

is Allan Chiu

is any value

is any value

is >= 40

is any time

is Active

does not contain Deceased or Inactive Patie...

Status Tags

is not Deceased or Inactive Patient or Left Pr...

Medication Name

doesn't contain

crestor

lipitor

zocor

pravachol

atorvastatin

rosuvastatin

simvastatin

+

Part 2

Lab Date

is in the last

5

years

+

Lab Name

doesn't contain

10-Year Cardiovascular Disease Risk

10-Year Cardiovascular Dis...

File Name

Cardiovascular Disease Risk Assessment (with Lipid Panel)

doesn't contain

Cardiovascular Disease Ris...

+

File Date

is in the last

5

years

+

ESPCN – Quarterly – CV Risk Eligible

Primary Physician

Patients ID

Sex

Age

Patient Status

Status Tags

is

is any value

is any value

is >= 40

is Active

is not Deceased or Inactive Patient or Left Pr...

Medication Name

doesn't contain

crestor

lipitor

zocor

pravachol

atorvastatin

rosuvastatin

simvastatin

+

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Outreach Queries

ESPCN – Outreach – Pediatrics, No Appt. in 2 Years

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is []	is any value	is any value	is in range [0, 17]	is Active	is not Deceased or Inactive Patient or Left Pr...
Notification Method	Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider
is any value	is any time	is any value	is note_signed or visit_completed	is before 24 months ago	is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Next Appointment

is null

+

ESPCN – Outreach – Adults, No Appt. in 3 Years

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is []	is any value	is any value	is in range [18, 74]	is Active	is not Deceased or Inactive Patient or Left Pr...
Notification Method	Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider
is any value	is any time	is any value	is note_signed or visit_completed	is before 36 months ago	is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Next Appointment

is null

+

ESPCN – Outreach – 75+, No Appt. in 1 Year

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is []	is any value	is any value	is >= 75	is Active	is not Deceased or Inactive Patient or Left Pr...
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phon
is any time	is any value	is note_signed or visit_completed	is before 12 months ago	is any value	is any

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Next Appointment

is null

+

***2025May QI Team confirmed the Chronic Disease query and the Screening Outreach queries are limited to patients seen in last 3 years. The patient list is free of duplicates patient already contacted from the 'Adult No Appt in 3 Years Outreach during the same rotation.**

Part 1

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

Status Tags

is Allan Chiu

is any value

is any value

is <= 74

is any time

is Active

is not Deceased or Inactive Patient or Left Pr...

Appointment Location

Appointment Status

Last Appointment

Last Appointment Provider

Cell Phone

Email

Home Phone

is any value

is note_signed or visit_completed

is in the last 3 years

is any value

is any value

is any v

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Next Appointment

is null

ICD Code

starts with

250

401

410

411

412

413

414

420

421

422

ICD Code

starts with

423

424

425

426

427

428

429

440

ICD Code

starts with

429

440

441

491

492

496

585

586

Patient Search

Patient ID	Patient Full Name	Patient Identification Value	Sex	Date of Birth	Age	Primary Provider	Phone	Email	Notify By	Last Appt	Full Address	Pairings	Explore from here	Download data
------------	-------------------	------------------------------	-----	---------------	-----	------------------	-------	-------	-----------	-----------	--------------	----------	-------------------	---------------

Merge the list (Part 1 & 2)

Part 1 search 'Preventive Care Compliance Preventive Care', **download the list of patients** who're due for Pap test

Preventive Care Report

Primary Practitioner is Allan Chiu	Patient ID is any value	Patient Status is Active	Patient Status Tag is not Deceased or Inactive Patient or Left Pr...	Appointment Date is any time	Appointment Status is any value	Latest Appointment Date is any time	More - 36
---------------------------------------	----------------------------	-----------------------------	---	---------------------------------	------------------------------------	--	-----------

Data source: 1. Patient Data → Preventive Care → Pap Smear → Date.
 2. Files (see or adjust file names in the [PDF File Name](#) dashboard filter)
 3. Forms data is pulling into the Ordered Column (see or adjust form names in the [PDF Form Name](#) dashboard filter)
 4. Lab results (see or adjust lab test names in the [PDF Lab Name](#) dashboard filter)

Pap Test

Pap Test (F; 25-69, 3 Years)						
	Primary Practitioner	Total Patients	Compliant	Compliant %	Non Compliant	Non Compliant %
1	Allan Chiu	112	86	76%	146	76%
Totals		112	86	76%	146	76%

[Download data](#)

Part 2 **download the list of patients Pap eligible**, excluded those who had surgical history Diagnosis or use file names documents indexed with the exclusion conditions

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

Status Tags

Appointment Location

Appointment Status

Last Appointment

Last Appointment Provider

Cell Phone

Email

Home Phone

is Allan Chiu

is any value

is Female

is in range [25, 69]

is any time

is Active

is not Deceased or Inactive Patient or Left Pr...

is any value

is note_signed or visit_completed

is in the last 3 years

is any value

is any value

is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Next Appointment

is null

Surgical Hx Diagnosis

Total abdominal hysterectomy

doesn't contain

total abdominal hysterecto...

total hysterectomy

TAH

File Name

doesn't contain

Total Hysterectomy_Bilater...

sort the 'Last Appt' date who do not have appointments in the Last 1 Year

Patient Search											
Patient ID	Patient Full Name	Patient Identification Value	Sex	Date of Birth Date	Age	Primary Provider	Phone	Email	Notify By	Last Appt	Full Address

ESPCN – Outreach – Mammo Due, No Appt. in 1 Year *limited to pts seen in last 3 years*

Merge list (Part 1 and 2)

Part 1 search 'Preventive Care Compliance Preventive Care' , **download the list of patients** who're due for Mammogram

Preventive Care Report

Primary Practitioner

Patient ID

Patient Status

Patient Status Tag

Appointment Date

Appointment Status

Latest Appointment Date

is Allan Chiu

is any value

is Active

is not Deceased or Inactive Patient or Left Pr...

is any time

is any value

is any time

More + 36

Mammography

Data source: 1. Patient Data → Preventive Care → Mammogram → Date
2. Files (see or adjust file names in the Mammogram File Name dashboard filter)
3. Forms data is pulling into the Ordered Column (see or adjust form names in the Mammogram Form Name dashboard filter)

Mammography (F, 45-74, 2 Years)

Primary Practitioner	Total Patients	Compliant	Compliant %	Non-Compliant	Non-Compliant %
1 Allan Chiu	183	51	28%	132	72%
Totals	183	51	28%	132	72%

Compliant Patients, Mammography (F, 45-74, 2 Years)

Non-compliant Patients, Mammography (F, 45-74, 2 Years)

Part 2 download the list of patients Mammo eligible

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

Status Tags

Appointment Location

Appointment Status

Last Appointment

Last Appointment Provider

Cell Phone

Email

Home Phone

is Allan Chiu

is any value

is Female

is in range [45, 74]

is any time

is Active

is not Deceased or Inactive Patient or Left Pr...

is any value

is note_signed or visit_completed

is in the last 3 years

is any value

is any value

is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Next Appointment

is null

sort the ‘Last Appt’ date who do not have appointments in the Last 1 Year

Patient Search

Patient ID

Patient Full Name

Patient Identification Value

Sex

Date of Birth

Age

Primary Provider

Phone

Email

Notify By

Last Appt

Full Address

Pairings

Explore from here

Download data

ESPCN – Outreach – CRC Due, No Appt. in 1 Year *limited to pts seen in last 3 years*
Merge List (Part 1 and 2)

Part 1 search ‘Preventive Care Compliance Preventive Care’ , download the list of patients who’re due for CRC

Preventive Care Report

Primary Practitioner

Patient ID

Patient Status

Patient Status Tag

Appointment Date

Appointment Status

Latest Appointment Date

More > 36

Data source: One of:

1. FIT Test (50-74, 2 Years):

• Patient Data → Preventive Care → FIT Test → Date.

• Files (see or adjust file names in the FIT File Name dashboard filter)

• Forms data is pulling into the Ordered Column (see or adjust form names in the FIT / Colonoscopy / Flex Sig Form Name dashboard filter)

• 3 sub results filter from or adjust sub result names in the FIT / Colonoscopy / Flex Sig Form Name dashboard filter

Colorectal Cancer Screen

Primary Practitioner

Total Patients

Compliant

Compliant %

Non-Compliant

Non-Compliant %

1

Allan Chiu

454

205

45%

249

55%

Totals

454

205

45%

249

55%

Compliant Patients, Colorectal Cancer Screen

Non-compliant Patients, Colorectal Cancer Screen

Patient ID

Patient Full Name

Age

Sex

Primary Practitioner

Latest Colonoscopy

Latest FIT Test

Latest Flex Sigmoidoscopy

Month Since the Latest Test

Patient ID

Patient Full Name

Age

Sex

Primary Practitioner

Latest Colonoscopy

Latest FIT Test

Latest Flex Sigmoidoscopy

Month Since the Latest Test

Explore from here

Download data

Part 2 download the list of patients CRC eligible

Patient Search

Primary Physician: **is Allan Chiu** Patients ID: **is any value** Sex: **is any value** Age: **is in range [50, 74]** Date of Birth: **is any time** Patient Status: **is Active** Status Tags: **is not Deceased or Inactive Patient or Left Pr...**

Appointment Location: **is any value** Appointment Status: **is note_signed or visit_completed** Last Appointment: **is in the last 3 years** Last Appointment Provider: **is any value** Cell Phone: **is any value** Email: **is any value** Home Phone: **is any value** 1. F

Status Tags: **is not Deceased or Inactive Patient or Left Pr...**

Next Appointment: **is null**

sort the 'Last Appt' date who do not have appointments in the Last 1 Year

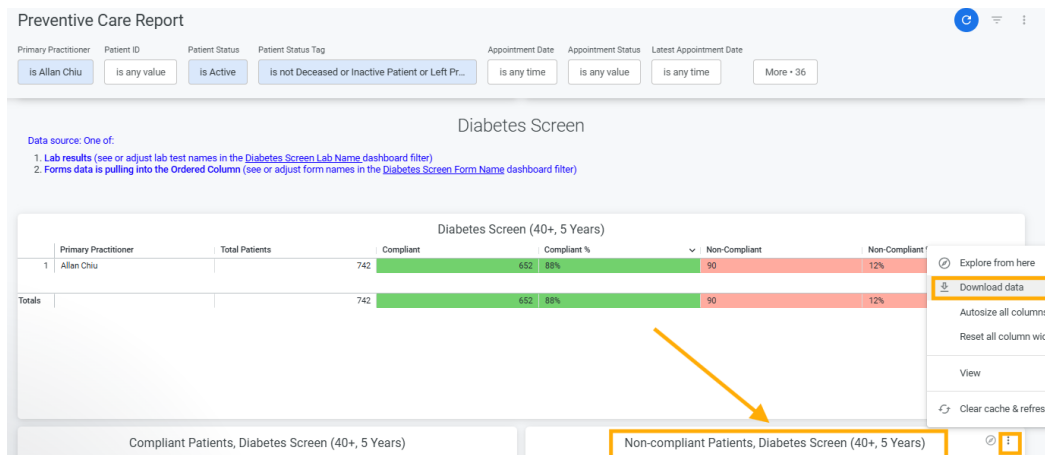
Patient Search

Patient ID	Patient Full Name	Patient Identification Value	Sex	Date of Birth	Age	Primary Provider	Phone	Email	Notify By	Last Appt	Full Address	Pairings
												Explore from here Download data

ESPCN – Outreach – Diabetes Due, No Appt. in 1 Year *limited to pts seen in last 3 years*

Merge List (Part 1 and 2)

Part 1 search 'Preventive Care Compliance Preventive Care', download the list of patients who're due for Diabetes Screening Tests



Part 2 download the list of patients Diabetes Screening eligible

Patient Search

Primary Physician: Patients ID: Sex: Age: Date of Birth: Patient Status: Status Tags:

Appointment Location: Appointment Status: Last Appointment: Last Appointment Provider: Cell Phone: Email: Home Phone:

Status Tags:

Next Appointment:

sort the 'Last Appt' date who do not have appointments in the Last 1 Year

Patient Search

Patient ID	Patient Full Name	Patient Identification Value	Sex	Date of Birth	Age	Primary Provider	Phone	Email	Notify By	Last Appt	Full Address	Pairings	Explore from here	Download data

ESPCN – Outreach – Lipids Due, No Appt. in 1 Year *limited to pts seen in last 3 years*

Merge List (Part 1 and 2)

Part 1 search 'Preventive Care Compliance Preventive Care', download the list of patients who're due for Lipids

Preventive Care Report

Primary Practitioner: Patient ID: Patient Status: Patient Status Tag: Appointment Date: Appointment Status: Latest Appointment Date: More: 36

Plasma Lipid Profile Non-Fasting

Data source: One of:

- Lab results (see or adjust lab test names in the [Plasma Lipid Profile Non-Fasting Lab Name dashboard filter](#))
- Forms data is pulling into the Ordered Column (see or adjust form names in the [Plasma Lipid Profile Non-Fasting Form Name dashboard filter](#))

Primary Practitioner	Total Patients	Compliant	Compliant %	Non-Compliant	Non-Compliant %
1 Allan Chiu	530	464	88%	66	12%
Totals	530	464	88%	66	12%

Compliant Patients, Plasma Lipid Profile Non-Fasting (40-74, 5 Years)

Non-compliant Patients, Plasma Lipid Profile Non-Fasting (40-74, 5 Years)

Part 2 download the list of patients Lipids eligible

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

Status Tags

is Allan Chiu

is any value

is any value

is in range [40, 74]

is any time

is Active

is not Deceased or Inactive Patient or Left Pr...

Appointment Location

Appointment Status

Last Appointment

Last Appointment Provider

Cell Phone

Email

Home Phone

is any value

is note_signed or visit_completed

is in the last 3 years

is any value

is any value

is any value

is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

Next Appointment

is null

+

sort the 'Last Appt' date who do not have appointments in the Last 1 Year

Patient Search

Patient ID	Patient Full Name	Patient Identification Value	Sex	Date of Birth Date	Age	Primary Provider	Phone	Email	Notify By	Last Appt	Full Address	Pairings	Explore from here	Download data
------------	-------------------	------------------------------	-----	-----------------------	-----	------------------	-------	-------	-----------	-----------	--------------	----------	-------------------	---------------

Baselines & Tracking

Create the Tracking Templates (refer to '[ESPCN TRACKING](#)' for details)

ESPCN – Tracking – Screening Reviewed by PCCA in the Last Week

ESPCN – Tracking – Pediatrics, No Appt. in 2 Years Outreach

ESPCN – Tracking – Adults, No Appt. in 3 Years Outreach

ESPCN – Tracking – 75+, No Appt. in 1 Year Outreach

ESPCN – Tracking – Chronic Disease, No Appt. in 1 Year Outreach

ESPCN – Tracking – Screening Due Outreach

ESPCN – Tracking – CPAR Conflict Outreach

QI Queries

ESPCN – Quarterly QI – Chronic Disease Patients (All Ages)

The screenshot displays a query builder interface for identifying Chronic Disease Patients. The top section includes filters for Primary Physician (set to 'is [redacted]'), Patients ID (set to 'is any value'), Sex (set to 'is any value'), Age (set to 'is any value'), Patient Status (set to 'is Active'), and Status Tags (set to 'is not Deceased or Inactive Patient or Left Pr...'). The bottom section features three ICD Code filters, each set to 'starts with' and followed by a grid of code ranges: 250-422, 423-440, and 429-586. A 'Status Tags' dropdown menu on the right shows options: Deceased, Inactive Patient, Left Practice, and Long Term Care Patient.

ESPCN – Quarterly QI – Chronic Disease Patients (All Ages) Seen in the Last Year

The screenshot displays a query builder interface for identifying Chronic Disease Patients seen in the last year. The top section includes filters for Primary Physician (set to 'is [redacted]'), Patients ID (set to 'is any value'), Sex (set to 'is any value'), Age (set to 'is any value'), Patient Status (set to 'is Active'), and Status Tags (set to 'is not Deceased or Inactive Patient or Left Pr...'). The bottom section includes filters for Appointment Date (set to 'is any time'), Appointment Location (set to 'is any value'), Appointment Status (set to 'is note_signed or visit_completed'), Last Appointment (set to 'is in the last 12 months'), Last Appointment Provider (set to 'is any value'), and Cell Phone (set to 'is any value'). The ICD Code filters are identical to the previous query, set to 'starts with' and followed by the same code ranges: 250-422, 423-440, and 429-586. A 'Status Tags' dropdown menu on the right shows options: Deceased, Inactive Patient, Left Practice, and Long Term Care Patient.

ESPCN – Quarterly QI – Patients 75+

Primary Physician

Patients ID

Sex

Age

Patient Status

Status Tags

is

is any value

is any value

is >= 75

is Active

is not Deceased or Inactive Patient or Left Pr...

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

ESPCN – Quarterly QI – Patients 75+ Seen in the Last Year

Primary Physician

Patients ID

Sex

Age

Patient Status

Status Tags

is

is any value

is any value

is >= 75

is Active

is not Deceased or Inactive Patient or Left Pr...

Appointment Date

Appointment Location

Appointment Status

Last Appointment

Last Appointment Provider

Cell Phone

is any time

is any value

is note_signed or visit_completed

is in the last 12 months

is any value

is any

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

ESPCN – Quarterly QI – Patients (All Ages)

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

Status Tags

is

is any value

is any value

is any value

is any time

is Active

is not Deceased or Inactive Patient or Left Pr...

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

ESPCN – Quarterly QI – Patients (All Ages) Seen in the Last 3 Years

Patient Search

Primary Physician

Patients ID

Sex

Age

Date of Birth

Patient Status

Status Tags

is

is any value

is any value

is any value

is any time

is Active

is not Deceased or Inactive Patient or Left Pr...

Notification Method

Appointment Date

Appointment Location

Appointment Status

Last Appointment

Last Appointment Provider

Cell Phone

is any value

is any time

is any value

is note_signed or visit_completed

is in the last 3 years

is any value

is any value

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

Deceased

Inactive Patient

Left Practice

Long Term Care Patient

ESPCN – Quarterly QI – Patients with Diabetes (Denominator)

Merge List (Part 1 and 2)
Part 1

Primary Physician: is [] Patients ID: is any value Sex: is any value Age: is >= 18 Patient Status: is Active Status Tags: is not Deceased or Inactive Patient or Left Pr...

ICD Code: starts with 250

Lab Name: contains Hemoglobin A1c, Hemoglobin A1C, HEMOGLOBIN A1C, Hemoglobin A1C (HBA1..., HEMOGLOBIN A1C (HB...

Lab Name List (Use Contains): is any value

Lab Value (Number): is >= 6.5

Status Tags: is not Deceased or Inactive Patient or Left Pr...

is not Deceased or Inactive Patient or Left Pr...

Deceased, Inactive Patient, Left Practice, Long Term Care Patient

Part 2

Primary Physician: is [] Patients ID: is any value Sex: is any value Age: is >= 18 Patient Status: is Active Status Tags: is not Deceased or Inactive Patient or Left Pr...

ICD Code: starts with 250

Lab Name: contains Glucose, fasting, Glucose, Fasting, GLUCOSE, FASTING

Lab Name List (Use Contains): is any value

Lab Value (Number): is >= 7.0

Status Tags: is not Deceased or Inactive Patient or Left Pr...

is not Deceased or Inactive Patient or Left Pr...

Deceased, Inactive Patient, Left Practice, Long Term Care Patient

ESPCN – Quarterly QI – Patients with Diabetes with an A1c in the Last 6 Months

Merge List (Part 1 and 2 and 3)

Part 1

Primary Physician: is [] Patients ID: is any value Sex: is any value Age: is >= 18 Patient Status: is Active Status Tags: is not Deceased or Inactive Patient or Left Pr...

ICD Code: starts with 250

Status Tags: is not Deceased or Inactive Patient or Left Pr...

is not Deceased or Inactive Patient or Left Pr...

Deceased, Inactive Patient, Left Practice, Long Term Care Patient

Lab Name

contains

- Hemoglobin A1c
- Hemoglobin A1C
- HEMOGLOBIN A1C
- Hemoglobin A1C (HBA1...
- HEMOGLOBIN A1C (HB...

Lab Name List (Use Contains)

is any value

Lab Value (Number)

is >= 6.5

Part 2

Primary Physician is Patients ID is any value Sex is any value Age is >= 18 Patient Status is Active Status Tags is not Deceased or Inactive Patient or Left Pr...

ICD Code starts with 250

Lab Name

contains

- Glucose, fasting
- Glucose, Fasting
- GLUCOSE_FASTING

Lab Name List (Use Contains)

is any value

Lab Value (Number)

is >= 7.0

Part 3

Primary Physician is Patients ID is any value Sex is any value Age is >= 18 Patient Status is Active Status Tags is not Deceased or Inactive Patient or Left Pr...

ICD Code starts with 250

Lab Date

is in the last

6

months

+

Lab Name

contains

Hemoglobin A1c

Hemoglobin A1C

HEMOGLOBIN A1C

Hemoglobin A1C (HBA1...

HEMOGLOBIN A1C (HB...

ESPCN – Quarterly QI – Patients with Diabetes with a DFE in the Last Year

Merge List (Part 1 and 2 and 3)

Part 1

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is	is any value	is any value	is >= 18	is Active	is not Deceased or Inactive Patient or Left Pr...

ICD Code

starts with 250

Lab Name

contains

- Hemoglobin A1c
- Hemoglobin A1C
- HEMOGLOBIN A1C
- Hemoglobin A1C (HBA1...
- HEMOGLOBIN A1C (HB...

Lab Name List (Use Contains)

is any value

Lab Value (Number)

is >= 6.5

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

- Deceased
- Inactive Patient
- Left Practice
- Long Term Care Patient

Part 2

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is	is any value	is any value	is >= 18	is Active	is not Deceased or Inactive Patient or Left Pr...

ICD Code

starts with 250

Lab Name

contains

- Glucose, fasting
- Glucose, Fasting
- GLUCOSE, FASTING

Lab Name List (Use Contains)

is any value

Lab Value (Number)

is >= 7.0

Status Tags

is not Deceased or Inactive Patient or Left Pr...

is not

- Deceased
- Inactive Patient
- Left Practice
- Long Term Care Patient

Part 3

(use 'is' and/or 'contains')

- 1) **Form name** and **File name** in the last 12 months – type ‘foot’ or ‘diab’ to look up any related files related to foot exam
- 2) also, **File name** in the last 12 months – type ‘dfa’ ‘dfe’ ‘diabetic foot’ ‘foot exam’ ‘foot screen’ ‘diabetic foot exam’)

Sex: is any value

Age: is any value

Patient Status: is any value

Form Name: is **di**

File Date: is in the last 12 months

Form Name dropdown options:

- DI and Pain Management - MIC (Edmonton-AB)
- General DI - Glenwood Radiology (Edmonton-AB)
- General DI - Insight Medical Imaging (AB)
- Medical Exam for Motor Vehicle Operators (AB)
- Medical Imaging - MIC (AB)
- MRI & CT - Insight Medical Imaging (Edmonton-AB)
- Pain Management - Insight Medical Imaging (AB)
- Parking Placard Application for Persons with Disabilities (AB)
- Personal Directive (AB)

File Name dropdown options:

- Aboriginal Diabetes Referral Faxed.pdf
- Adult Diabetes Program Appt Notification_Pt is aware.pdf
- Adult Diabetes Program Referral GNCH.pdf
- Adult Diabetes Program Referral Received.pdf
- Alberta Works Letter_Re: Diabetic Diet_Faxed to Alberta Works.pdf
- Appointment-Diabetes Foot/Wound Clinic
- Appt Info_Adult Diabetes Program.pdf
- Appt notice_Diabetes clinic_Rah.pdf
- Appt notice_Pt aware/advised Diabetes clinic-misericordia.pdf
- Appt notice_Pt aware/advised Diabetes clinic.pdf
- Appt notice_Read by dr. chiu Diabetes

File Name search results:

- Diabetes Annual_Foot Exa...
- Diabetic Foot_Screen.pdf
- diabetes foot

File Date: is in the last 12 months

File Name

is **Diabetes Annual_Foot Exa...**

OR is **dfe dfa diabetic foot foot exam foot screen diabetic foot exam**

File Date: is in the last 12 months