



## Accuro PCCA Setup Guide

Updated May 2025

***\*\*Important Notice\*\****

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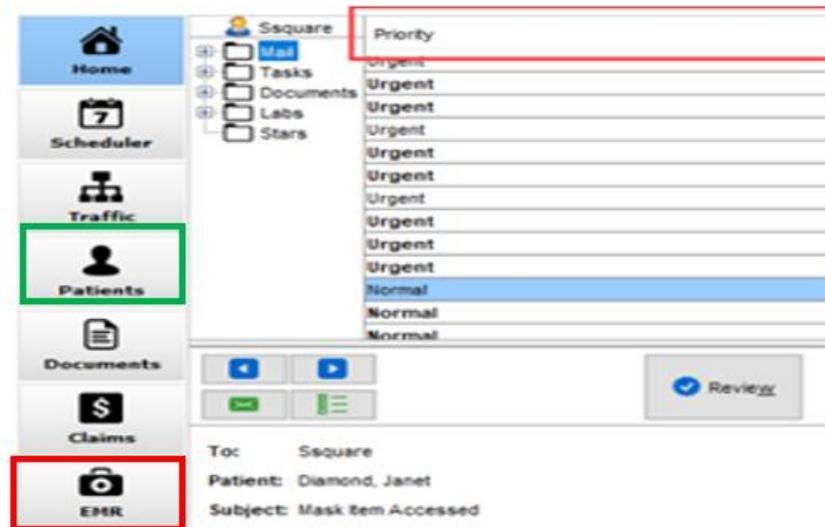
## Introduction

This guide will show you how to build the necessary queries (searches) for the ESPCN’s ‘Proactive Care Coordinator Assistant’ program in Accuro. These will include queries for quarterly reporting, outreach and for tracking work.

## Contents

Accuro home page will be your starting point when you log in. The icons on the left-hand side will help you to access the EMR; it provides the patient’s information, schedule of appointments, tasks assigned, and other functions.

## Accuro Basics/Tips



The icons below will help you to explore how the icon functions and the new screen will open.



Home - Where to find tasks assigned directly to yourself for action.



Calendar - This takes you to the schedule, for you and other providers in the clinic.



Patients - Shows the demographic information for that patient, it is where changes would happen.



EMR –The meat of the patient chart with all documents, chart notes etc. appear.



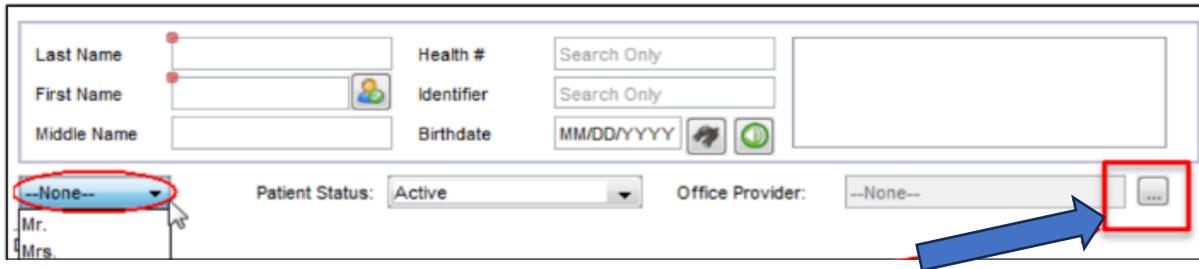
Three-line and dot icon – All tasks assigned to somebody will be in here, filtering to tasks directly assigned to one provider is in here, this will be discussed further later.

To capture patient attachment and confirmation, the **patient status**, **office provider**, and **verification** icons should be checked.

### Patient Demographics (attachment and confirmation)

Last Name	<input type="text"/>	ULI	<input type="text" value="Search Only"/>	<input type="text"/>				
First Name	<input type="text"/>	Identifier	<input type="text" value="Search Only"/>					
Middle Name	<input type="text"/>	Birthdate	<input type="text" value="MM/DD/YYYY"/> <input type="button" value="🔍"/> <input type="button" value="🔊"/>					
Title:	Mr. <input type="button" value="▼"/>	Suffix:	<input type="button" value="▼"/>	Patient Status:	New Patient <input type="button" value="▼"/>	Office Provider:	--None-- <input type="button" value="..."/>	<input type="button" value="✕"/>

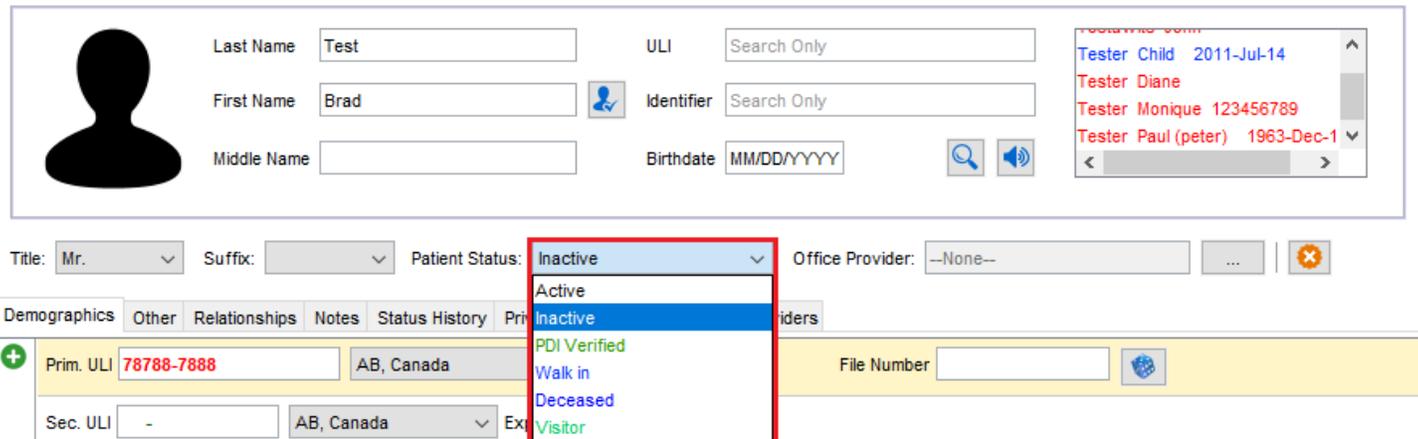
## To set the Office Provider



The screenshot shows a patient form with fields for Last Name, First Name, Middle Name, Health #, Identifier, and Birthdate. The Office Provider field is set to "--None--". A red box highlights the dropdown arrow, and a blue arrow points to the ellipsis button to the right of the Office Provider field.

1. Click the **Patients** button  on the side bar.
2. Click the **Ellipses** button (red box) to the right of the **Office Provider** text box.
3. Providers that exist in your clinic are displayed in the search results by default. To select one, click the provider's name to select and click **Select**.
4. Click **Update Patient**.

## To set Patient Status



The screenshot shows a patient form with fields for Last Name, First Name, Middle Name, ULI, Identifier, and Birthdate. The Patient Status field is set to "Inactive". A red box highlights the dropdown arrow and the list of options: Active, Inactive, PDI Verified, Walk in, Deceased, and Visitor. The Office Provider field is set to "--None--".

1. Click the **Patients** button  on the side bar.
2. Click  and select the **Patient Status** from the list displayed.

## To set Patient Verified Date (Confirmation)

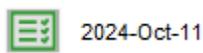
Form for Patient Information:

Last Name: Test ULI: Search Only  
First Name: Brad Identifier: Search Only  
Middle Name: Birthdate: MM/DD/YYYY

Title: Mr. Suffix: Patient Status: Inactive Office Provider: --None--

Buttons: [Search] [Speaker] [List Icon]

Dropdown menu (highlighted with red box):  
Tester Child 2011-Jul-14  
Tester Diane  
Tester Monique 123456789  
Tester Paul (peter) 1963-Dec-1

In the **Patients** window, there will be a button to the right of the 'Office Provider' section. If the patient's information has never been verified, it will show an orange icon with an 'X' . If the information has been verified in the past, it will show a green icon and the date last verified .

Click this button to document the date the patient's attachment and demographics were last confirmed. You will be prompted to confirm this action before the chart is date stamped.

Patient: Test, Minnie Mouse 1981-Sep-06 (42 Yr female) 99999-9999 h:(000) \_\_\_-\_\_\_ c: (000) \_\_\_-\_\_\_ w:(000) \_\_\_-\_\_\_  
Preferred Contact Method: None Primary Physician:

Form for Patient Information (Minnie Mouse):  
Last Name: Test ULI: Search Only  
First Name: Minnie Mouse Identifier: Search Only  
Middle Name: Birthdate: MM/DD/YYYY

Title: Mrs. Suffix: Patient Status: Active Office Provider: Jeffery, Glenn

Buttons: [Search] [Speaker] [List Icon]

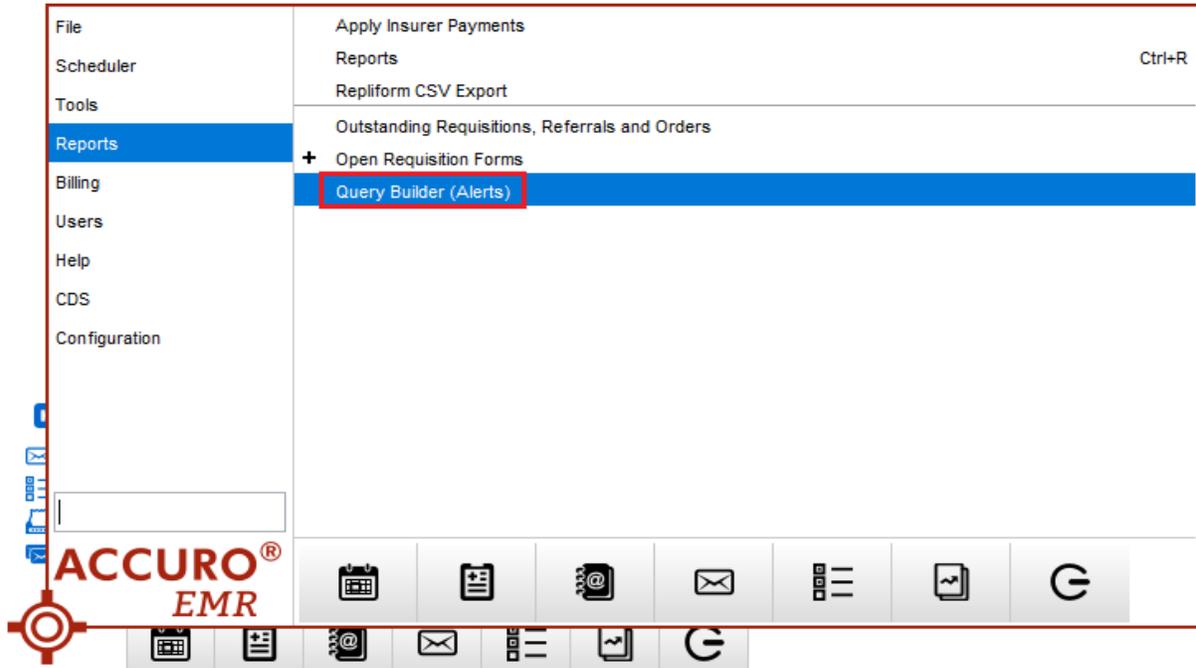
Dropdown menu (highlighted with red box):  
2024-Jan-09

Verify Patient Demographics dialog box:  
By clicking Yes, you acknowledge that this patient's demographics, office provider and status at the clinic have been verified. This action will record the date, time and user who performed the verification and will mark the patient as verified. Do you wish to continue?  
 Remember my choice and do not show this message again.  
Yes No

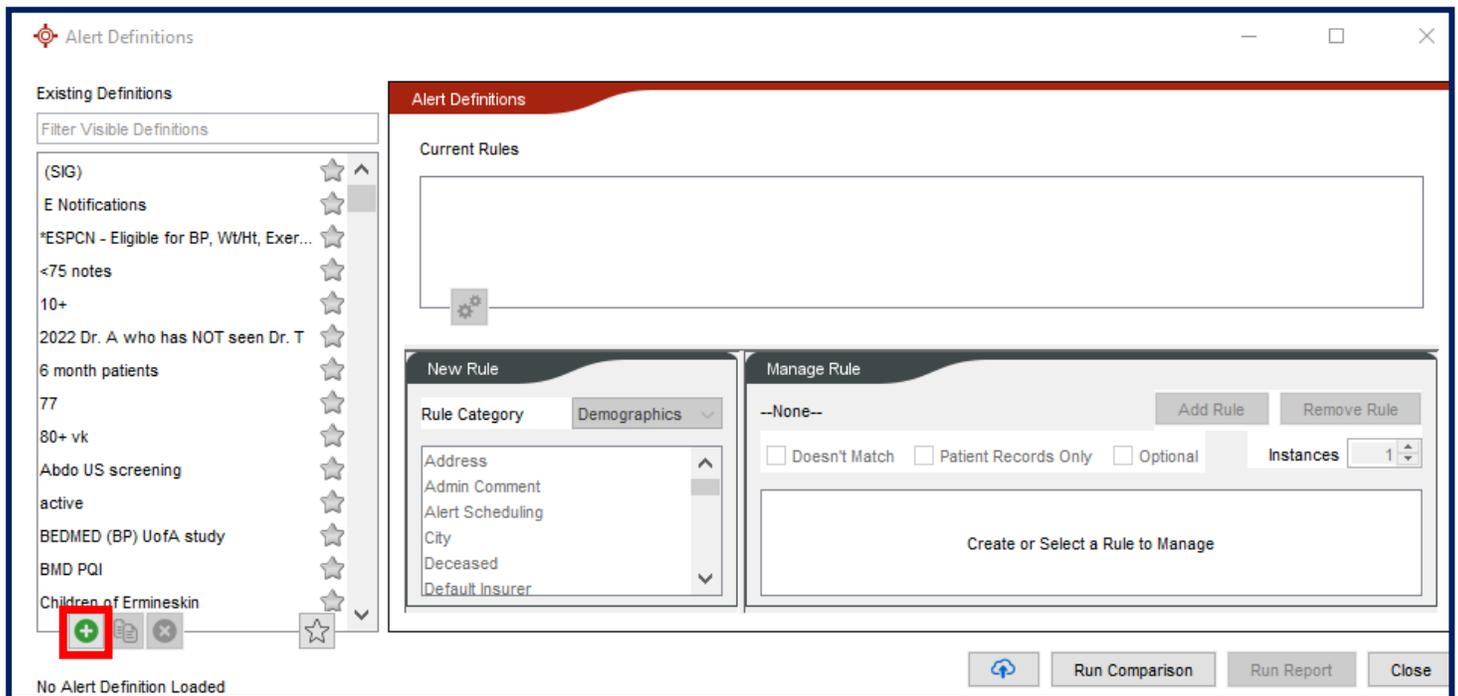
## Building Queries

The target icon  on the lower left will help you to explore the tools you need to build queries.

To create a new query, select **Reports > Query Builder (Alerts)**.



Upon clicking on query builder, the window below will appear. Click  to create a new query.

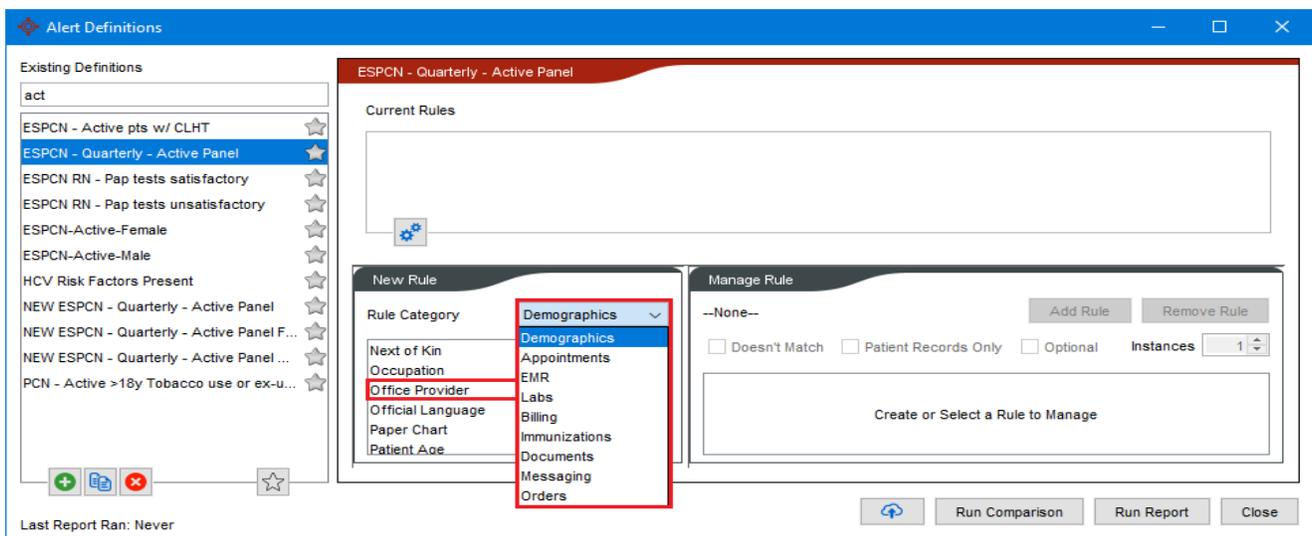
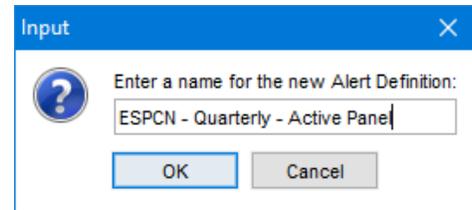


You will be prompted to name your new query (you can change this later if needed).

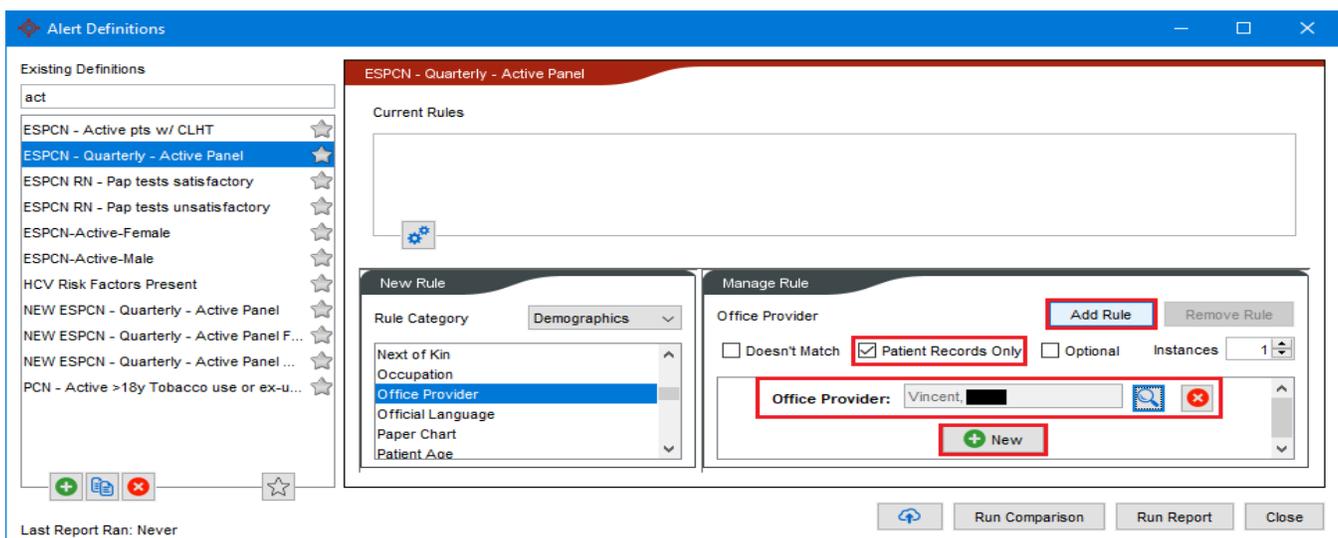
## ESPCN – Active Panel

When building queries, you will start with the active panel – how the clinic identifies who their active patients are. It usually includes status of active patient and office provider. This will be the basis for most, if not all, of your queries. *(In Accuro, you are prompted to select which office providers' panels to search from when you run a report. A dedicated query line for 'office provider' may not be necessary.)*

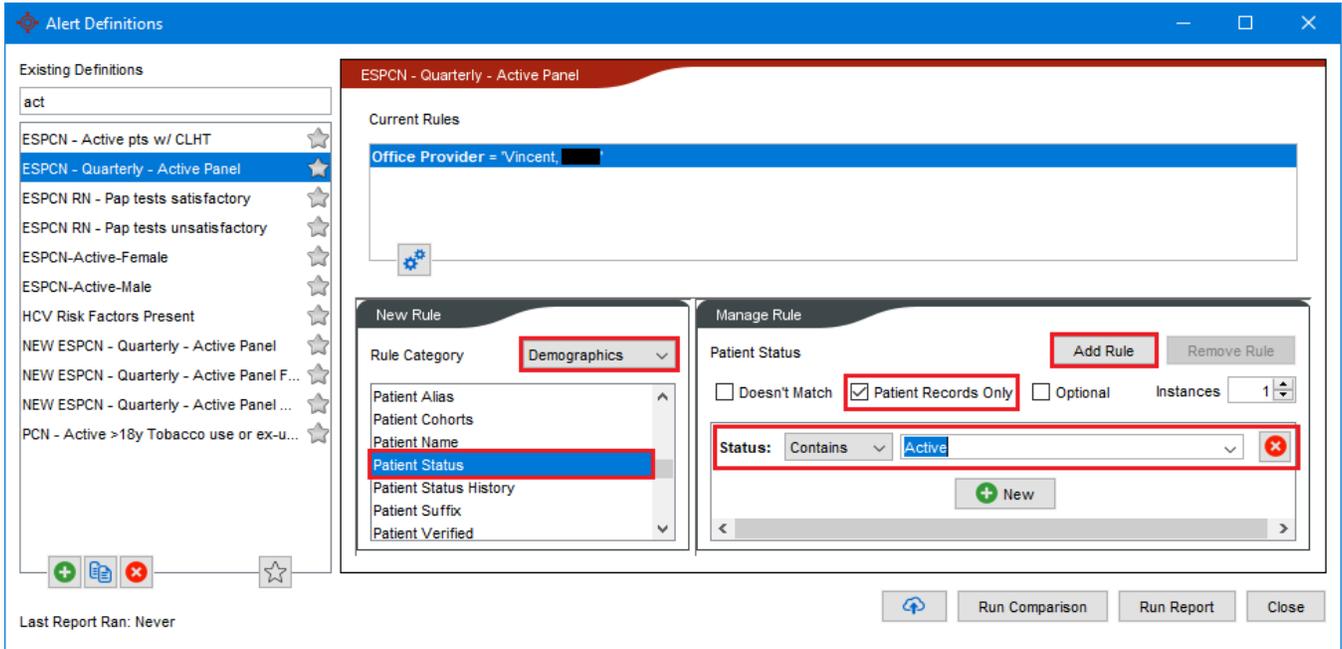
From here, you can start adding specific criteria to your query. Select the section of the chart you want to your query line to search from in the **'Rule Category'** dropdown menu under **'New Rule'**. Then, select the specific type of information from the list provided. Here, we will start with **'Office Provider'**.



Check off **'Patient Records Only'**. Click **'New'** to add details to your query line. We will select the provider whose panel we're working on. Click **'Add Rule'** to save your line.



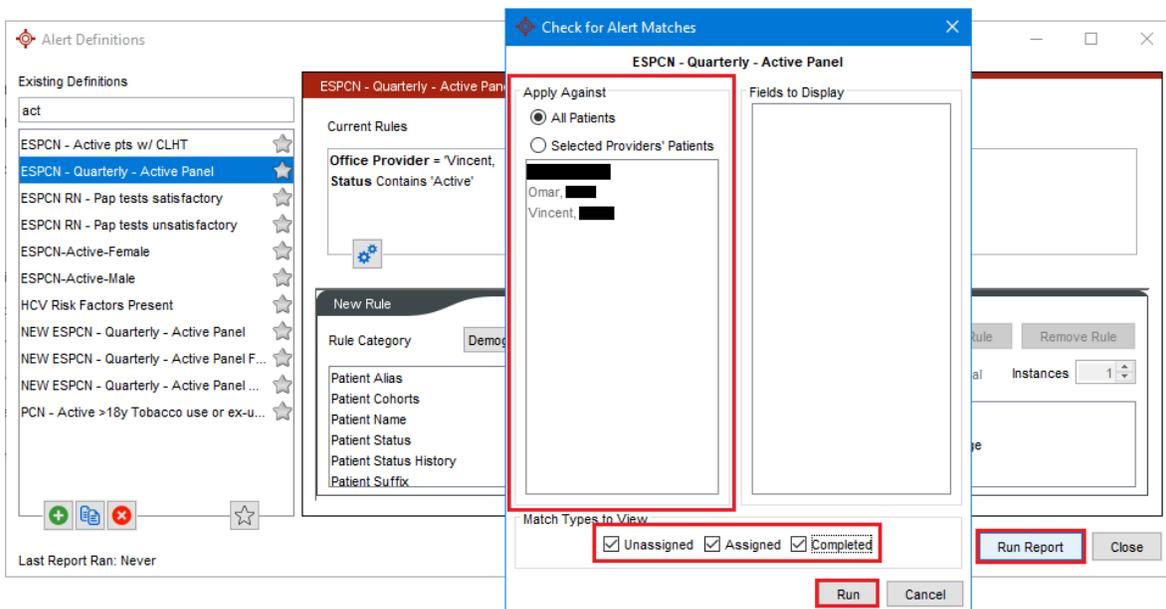
Repeat the process for your **'Status'** line, selecting **'Demographics'** > **'Patient Status'** > **'Patient Records Only'** > **'New'** > **'Status: Active'** > **'Add Rule'**



Once completed, your active panel query should look like this. You can now run your report!



Under **'Match Types to View'** check off **'Unassigned'**, **'Assigned'**, and **'Completed'**. (You can also select a provider here if you did not create an 'Office Provider' line.) Click **'Run'** to view your patient list.

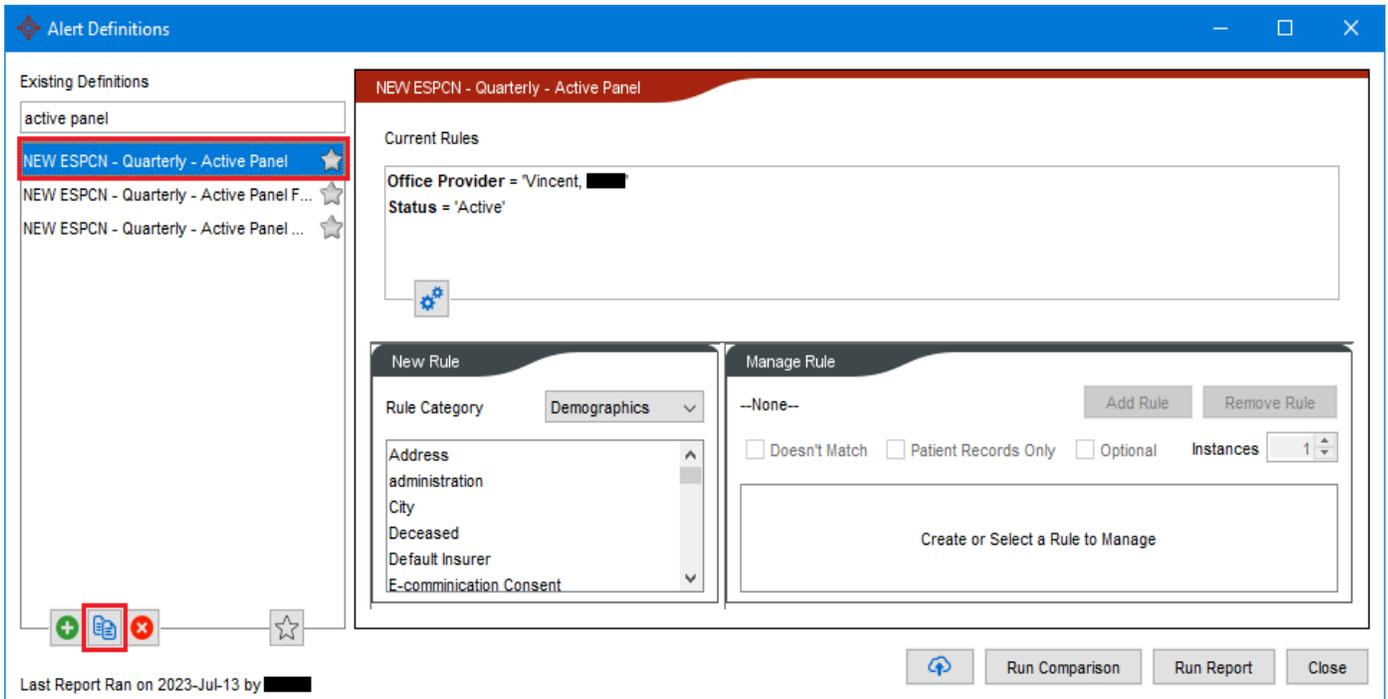


## Quarterly Reporting Queries

Most of the queries that you will build will search for patients who are DUE for different laboratory tests and diagnostic imaging. Due is used to search for patients with the absence of certain labs/ documents/ scans/ chart data in a specific date range.

As all the following queries start with our 'active patient' criteria, you can save time by copying your 'Active Panel' query as a starting point.

1. Click on the **Accuro target**  > **Reports > Query Builder (Alerts)**.
2. Select your 'Active Panel' query and click the 'Copy' button .



## ESPCN - Quarterly – Panel Queries

1. Copy your 'Active Panel' query and name the new one **ESPCN – Quarterly – Panel Females** > **OK**.
2. Under '**Rule Category**', choose '**Demographics**' and select **Sex = Female** > **Update Rule** to SAVE.

The image shows two side-by-side screenshots of a software interface. The left screenshot, titled 'New Rule', shows a 'Rule Category' dropdown menu set to 'Demographics'. Below it is a list of demographic fields: Patient Suffix, Patient Verified, Pharmacy, Phone Number, Postal Code, Province or State, Referral Date, Referring Phys., Registration No., Relation, Relationship Status, Sex (highlighted with a red box), Spoken Language, Test, and ULI. The right screenshot, titled 'Manage Rule', shows the 'Sex' dropdown menu set to 'Female' (highlighted with a red box). Above it, there are radio buttons for 'Doesn't Match', 'Patient Records Only' (checked), and 'Optional'. To the right of these is an 'Instances' dropdown set to '1'. At the top right of the 'Manage Rule' window, there are two buttons: 'Update Rule' (highlighted with a red box) and 'Remove Rule'.

## ESPCN – Quarterly – Panel Females

The screenshot shows a rule configuration window with a red header bar that reads 'NEW ESPCN - Quarterly - Active Panel Females'. Below the header, there is a section titled 'Current Rules' which contains a list of criteria: 'Office Provider = 'Vincent, [REDACTED]'' (where [REDACTED] is a black box), 'Status = 'Active'', and 'Sex = 'Female''.

## ESPCN – Quarterly – Panel Males

You can now copy your 'Panel Females' query to create a 'Panel Males' query, changing 'female' to 'male' in your criteria.

The screenshot shows a rule configuration window with a red header bar that reads 'NEW ESPCN - Quarterly - Active Panel Males'. Below the header, there is a section titled 'Current Rules' which contains a list of criteria: 'Office Provider = 'Vincent, [REDACTED]'' (where [REDACTED] is a black box), 'Status = 'Active'', and 'Sex = 'Male''.

### ESPCN – Quarterly – Age Queries

1. Copy your 'Active Panel' query and name the new one **ESPCN – Quarterly – Age 0-9**.
2. Under '**Rule Category**', choose '**Demographics**' and select '**Patient Age**' > '**between**' '**0 Years**' to '**10 years**' > '**Update Rule**' to SAVE.

The image shows two side-by-side windows from a software interface. The left window, titled 'New Rule', has a 'Rule Category' dropdown set to 'Demographics'. Below it is a list of categories, with 'Patient Age' selected and highlighted in blue. The right window, titled 'Manage Rule', shows the configuration for the 'Patient Age' rule. It includes 'Add Rule' and 'Remove Rule' buttons. There are three checkboxes: 'Doesn't Match' (unchecked), 'Patient Records Only' (checked), and 'Optional' (unchecked). An 'Instances' dropdown is set to '1'. The main configuration area shows 'Age: Between' with a dropdown menu. Below this are two rows of age range selectors: '0 Years 0 Months' and '10 Years 0 Months'. A red 'X' icon is next to the second row, and a '+ New' button is below.

### ESPCN – Quarterly – Age \*\*-\*\*

The image shows a screenshot of the 'Current Rules' section for a query titled 'ESPCN - Quarterly - Age 0-9'. The rules listed are: 'Office Provider = Vincent, [redacted]', 'Status Contains Active', and 'Age Between 0 Years and 10 Years'.

Copy this query and adjust accordingly for the remaining age brackets. (For 90+, change to **Age > 'Over' '90 years'**.)

### ESPCN Quarterly – Verification Rate Queries

1. Copy your 'Active Panel' query and name the new one **ESPCN – Quarterly – 6M # of patients verified**.
2. Under '**Rule Category**', select '**Appointments**' > '**Appointment**' > **Date: 'in the last' '6 months'** > **Add Rule**
3. Under '**Rule Category**', select '**Demographics**' and select '**Patient Verified**' > '**in the last 6 months**' > **Add Rule**

**New Rule**

Rule Category: **Appointments** ▾

- Appointment
- Cancelled Appointment
- Traffic Manager
- Wait List

**Manage Rule**

Appointment **Add Rule** **Remove Rule**

Doesn't Match  Patient Records Only  Optional Instances:

Date: In the Last ▾ 6 ▾ Months ▾ ✕

+ New

**New Rule**

Rule Category: **Demographics** ▾

- Next of Kin
- Occupation
- Office Provider
- Official Language
- Paper Chart
- Patient Age
- Patient Alias
- Patient Cohorts
- Patient Name
- Patient Status
- Patient Status History
- Patient Suffix
- Patient Verified
- Pharmacy
- Phone Number

**Manage Rule**

Patient Verified **Add Rule** **Remove Rule**

Doesn't Match  Patient Records Only  Optional Instances:

Last Verified: In the Last ▾ 6 ▾ Months ▾ ✕

+ New

## ESPCN – Quarterly – 6m # of Patients Verified

ESPCN - Quarterly - 6M # of patients verified

### Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Appointment Date In the Last 6 Months  
Last Verified In the Last 6 Months

## ESPCN - Quarterly – 6m # of Appointments

Copy your '6m # of Patients Verified' query, select your '**Last Verified**' line and click '**Remove Rule**' to create your '6m # of Appointments' query.

ESPCN - Quarterly - 6M # of Appointments

### Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Appointment Date In the Last 6 Months

## ESPCN - Quarterly – 3yr # of Patients Verified

Copy your '6m # of Patients Verified' query and adjust the '**Appointment Date**' and '**Last Verified**' lines from '6 months' to '**3 years**'.

ESPCN - Quarterly - 3yr # patients Verified

### Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Appointment Date In the Last 3 Years  
Last Verified In the Last 3 Years

## ESPCN - Quarterly – 3yr # of Appointments

Copy your '6m # of Patients Appointments' query and adjust the '**Appointment Date**' line from '6 months' to '**3 years**' OR copy your '3yr # of Patients Verified' query, select your '**Last Verified**' line and click '**Remove Rule**'.

ESPCN - Quarterly - 3yr # of Appointments

### Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Appointment Date In the Last 3 Years

## Quarterly – Vitals & Lifestyle Queries

1. Copy your 'Active Panel' query and name the new one **ESPCN – Quarterly – Eligible 18+**.
2. Under '**Rule Category**', choose '**Demographics**' and select **Patient Age > 'Age: Older Than 18 Years'** > **Add Rule** to SAVE

**New Rule**

Rule Category: Demographics

- File Number
- Flags
- Global Message
- Next of Kin
- Occupation
- Office Provider
- Official Language
- Paper Chart
- Patient Age**
- Patient Alias
- Patient Cohorts
- Patient Name
- Patient Status
- Patient Status History
- Patient Suffix

**Manage Rule**

Patient Age

Doesn't Match  Patient Records Only  Optional Instances: 1

Age: Younger Than 18 Years 0 Months

## ESPCN – Quarterly - Eligible 18+

ESPCN - Quarterly - 18+ Eligible

Current Rules

- Office Provider = Vincent, [redacted]
- Status = 'Active'
- Age Older Than 18 Years

## ESPCN – Quarterly – BP Due

1. Copy your 'Eligible 18+' query and name the new one 'ESPCN – Quarterly – BP Due'
2. **Rule Category > Labs > Lab Result > 'Lab Type Contains 'BP – Systolic' > 'Observation Date In the Last 1 Years' > Check off 'Only Check Latest Result' > Check off 'Include Reviewed Labs'.** (The lab type names may vary from clinic to clinic.)
3. This time, we will also check off **'Doesn't Match'** in addition to **'Patient Records Only'** as we are looking for patients who do NOT have a BP in their chart within the last year. *We will be checking these off for all our 'Due' queries.* **These lines will be highlighted in red.** 'Add Rule' to save line.
4. **Rule Category > Labs > Lab Result > 'Lab Type Contains 'BP – Diastolic' > 'Observation Date In the Last 1 Years' > Check off 'Only Check Latest Result' > Check off 'Include Reviewed Labs'.** Once again, check off **'Doesn't Match'** in addition to **'Patient Records Only'**. 'Add Rule' to save line.
5. **Rule Category > EMR > Preventative Screening > 'History: Contains Blood Pressure' > 'Doesn't Match' > 'Patient Records Only' > 'Add Rule'.** (Again, the location of these observations may vary from clinic to clinic- be sure to check if there are other areas this information is entered and add extra lines as appropriate.)

ESPCN - Quarterly - BP Due

### Current Rules

Office Provider = 'Vincent, [REDACTED]

Status = 'Active'

Age Older Than 18 Years

**Lab Type Contains 'BP - Systolic' AND Observation Date In the Last 1 Year AND Only Check Latest Result AND Include Reviewed Labs**

**Lab Type Contains 'BP - Diastolic' AND Observation Date In the Last 1 Year AND Only Check Latest Result AND Include Reviewed Labs**

**Preventative Screening History Contains 'Blood Pressure' AND Preventative Screening Date In the Last 1 Year**

**5: Document Type Contains 'Labs' AND Document Sub-Type Contains '24 Hr BP Monitoring' AND Document Received Date In**

**6: Screening History Contains 'Blood Pressure (QY)' AND Screening Date In the Last 1 Year**

**7: Encounter Note Date In the Last 1 Year AND Encounter Note Content Contains 'bp' OR Contains 'blood pressure'**

The image shows two side-by-side screenshots of a software interface. The left screenshot, titled 'New Rule', shows a dropdown menu for 'Rule Category' set to 'Labs' and a text area for 'Lab Result'. The right screenshot, titled 'Manage Rule', shows the configuration for a 'Lab Result' rule. It includes buttons for 'Update Rule' and 'Remove Rule'. The 'Doesn't Match' and 'Patient Records Only' checkboxes are checked and highlighted with a red box. The 'Lab Type' is set to 'Contains' and 'BP - Systolic'. The 'Observation Date' is set to 'In the Last 1 Years'. Other options include 'Only Check Latest Result', 'Include Reviewed Labs', and 'Only Abnormal Results'.

Now that you're familiar with the basics of building queries in Accuro, you can use the following query screenshots as a guide. Start by copying your 'Eligible 18+' query for the rest of your Vitals and Lifestyle queries.

### ESPCN – Quarterly – Height & Weight Due

ESPCN - Quarterly - Height and Weight Due

Current Rules

---

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Age Older Than 18 Years  
Lab Type Contains 'Height' AND Observation Date In the Last 100 Years AND Only Check Latest Result AND Include Reviewed Labs  
Lab Type Contains 'Weight' AND Observation Date In the Last 3 Years AND Only Check Latest Result AND Include Reviewed Labs  
Preventative Screening History Contains 'Height (cm) ' AND Preventative Screening Date In the Last 100 Years  
Preventative Screening History Contains 'Weight (kg) ' AND Preventative Screening Date In the Last 3 Years

### ESPCN – Quarterly – Exercise Assessment Due

ESPCN - Quarterly - Exercise Due

Current Rules

---

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Age Older Than 18 Years  
Lab Type Contains 'Exercise Assessment' AND Observation Date In the Last 1 Year AND Only Check Latest Result AND Include Reviewed Labs  
Lab Type Contains 'Exercise Weekly' AND Observation Date In the Last 1 Year AND Only Check Latest Result AND Include Reviewed Labs  
Preventative Screening History Contains 'Exercise Assessment ' AND Preventative Screening Date In the Last 1 Year

### ESPCN – Quarterly – Tobacco Assessment Due

ESPCN - Quarterly - Tobacco Due

Current Rules

---

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Age Older Than 18 Years  
Preventative Screening History Contains 'Tobacco Assessment' AND Preventative Screening Date In the Last 1 Year  
Lab Type Contains 'Smoking status' AND Observation Date In the Last 1 Year AND Only Check Latest Result AND Include Reviewed Labs  
Lab Type Contains 'Tobacco ' AND Observation Date In the Last 1 Year AND Only Check Latest Result AND Include Reviewed Labs  
Lab Type Contains 'Tobacco Assessment' AND Observation Date In the Last 1 Year AND Only Check Latest Result AND Include Reviewed Labs

## Quarterly – Cancer Screening Queries

To start your eligible queries, begin by copying your 'Active Panel' query and add your extra criteria. Once you've built an 'eligible' query for a particular screening, you can start building the 'due' query for the same screening by copying it and adding the additional criteria.

### ESPCN – Quarterly – Pap Eligible

ESPCN - Quarterly - Pap Eligible

Current Rules

---

**Office Provider** = 'Vincent, [REDACTED]'  
**Status** = 'Active'  
**Sex** = 'Female'  
**Age** Between 25 Years and 70 Years  
**Medical Hist Note** Contains 'hysterectomy'  
**Preventative Screening History** Contains 'Total Laparoscopic Hysterectomy'

### ESPCN – Quarterly – Pap Due

ESPCN - Quarterly - Pap Due

Current Rules

---

**Office Provider** = 'Vincent, [REDACTED]'  
**Status** = 'Active'  
**Sex** = 'Female'  
**Age** Between 25 Years and 70 Years  
**Medical Hist Note** Contains 'hysterectomy'  
**Preventative Screening History** Contains 'Total Laparoscopic Hysterectomy'  
**Lab Type** Contains 'PAP' AND **Observation Date** In the Last 3 Years AND **Only Check Latest Result** AND **Include Reviewed Labs**  
**Lab Type** Contains 'DKML Cytology Gynecological' AND **Observation Date** In the Last 3 Years AND **Only Check Latest Result** AND **Include Reviewed Labs**  
**Document Created Date** In the Last 3 Years AND **Document Sub-Type** Contains 'gynecology'  
**Preventative Screening History** Contains 'PAP' AND **Preventative Screening Date** In the Last 3 Years

### ESPCN – Quarterly – Mammo Due

ESPCN - Quarterly - Mammo Due

Current Rules

---

**Office Provider** = 'Vincent, [REDACTED]'  
**Status** = 'Active'  
**Sex** = 'Female'  
**Age** Between 45 Years and 75 Years  
**Lab Type** Contains 'mammo' AND **Observation Date** In the Last 2 Years AND **Only Check Latest Result** AND **Include Reviewed Labs**  
**Document Created Date** In the Last 2 Years AND **Document Sub-Type** Contains 'mammo'  
**Preventative Screening History** Contains 'Mammography' AND **Preventative Screening Date** In the Last 2 Years

## ESPCN – Quarterly – Mammo Eligible

ESPCN - Quarterly - Mammo Eligible

### Current Rules

**Office Provider** = 'Vincent, [REDACTED]'  
**Status** = 'Active'  
**Sex** = 'Female'  
**Age Between 45 Years and 75 Years**

## ESPCN – Quarterly – CRC Due

ESPCN - Quarterly - CRC Due

### Current Rules

**Office Provider** = 'Vincent, [REDACTED]'  
**Status** = 'Active'  
**Age Between 50 Years and 75 Years**  
**Lab Type** Contains 'Fecal Immunochemical Test' OR Contains 'Fecal Immunochemical Test (FIT)' AND **Observation Date** In the Last 2 Years AND **Only Check Latest Result AND Include Reviewed Labs**  
**Lab Type** Contains 'Sigmoidoscopy' AND **Observation Date** In the Last 5 Years AND **Only Check Latest Result AND Include Reviewed Labs**  
**Lab Type** Contains 'Colonoscopy' AND **Observation Date** In the Last 10 Years AND **Only Check Latest Result AND Include Reviewed Labs**  
**Document Created Date** In the Last 2 Years AND **Document Sub-Type** Contains 'fit'  
**Document Created Date** In the Last 5 Years AND **Document Sub-Type** Contains 'sigmoid'  
**Document Created Date** In the Last 10 Years AND **Document Sub-Type** Contains 'colonoscopy'  
**Preventative Screening History** Contains 'FIT Test' AND **Preventative Screening Date** In the Last 2 Years  
**Preventative Screening History** Contains 'Flex Sigmoidoscopy' AND **Preventative Screening Date** In the Last 5 Years  
**Preventative Screening Date** In the Last 10 Years AND **Preventative Screening Details** Contains 'colonoscopy'

## ESPCN – Quarterly – CRC Eligible

ESPCN - Quarterly - CRC Eligible

### Current Rules

**Office Provider** = 'Vincent, [REDACTED]'  
**Status** = 'Active'  
**Age Between 50 Years and 75 Years**

## Quarterly – Metabolic Screening

To start your eligible queries, begin by copying your 'Active Panel' query and add your extra criteria. Once you've built an 'eligible' query for a particular screening, you can start building the 'due' query for the same screening by copying it and adding the additional criteria.

## ESPCN – Quarterly - Diabetes Due

### ESPCN - Quarterly - Diabetes Due

#### Current Rules

**Office Provider** = 'Vincent, [REDACTED]'

**Status** = 'Active'

**Age Older Than 40 Years**

**Lab Type** Contains 'Glucose, fasting' AND **Observation Date** In the Last 5 Years AND **Only Check Latest Result** AND **Include Reviewed Labs**

**Lab Type** Contains 'a1c' AND **Observation Date** In the Last 5 Years AND **Only Check Latest Result** AND **Include Reviewed Labs**

**Document Created Date** In the Last 5 Years AND **Document Description** Contains 'glucose, fast' OR Contains 'a1c'

**Preventative Screening History** Contains 'Diabetes Screening' AND **Preventative Screening Date** In the Last 5 Years

## ESPCN – Quarterly – Diabetes Eligible

### ESPCN - Quarterly - Diabetes Eligible

#### Current Rules

**Office Provider** = 'Vincent, [REDACTED]'

**Status** = 'Active'

**Age Older Than 40 Years**

## ESPCN – Quarterly – Lipids Due

### ESPCN - Quarterly - Lipids Due

#### Current Rules

**Office Provider** = 'Vincent, [REDACTED]'

**Status** = 'Active'

**Age Between 40 Years and 75 Years**

**Prescription** Contains 'astatin' OR Contains 'crestor' OR Contains 'zocor' OR Contains 'lipitor' OR Contains 'pravachol' AND **Prescription Status** = 'Active'

**Observation Date** In the Last 5 Years AND **Lab Test** Contains 'lipid' OR Contains 'cardiovascular disease risk' AND **Only Check Latest Result** AND **Include Reviewed Labs**

**Document Created Date** In the Last 5 Years AND **Document Description** Contains 'lipid'

**Preventative Screening History** Contains 'Lipid Panel' OR Contains 'Lipid Profile' AND **Preventative Screening Date** In the Last 5 Years

## ESPCN – Quarterly – Lipids Eligible

### ESPCN - Quarterly - Lipids Eligible

#### Current Rules

**Office Provider** = 'Vincent, [REDACTED]'

**Status** = 'Active'

**Age Between 40 Years and 75 Years**

**Prescription** Contains 'astatin' OR = 'crestor' OR = 'zocor' OR = 'lipitor' OR = 'pravachol' AND **Prescription Status** = 'Active'

## ESPCN – Quarterly – CVR Due

ESPCN - Quarterly - CVR Due

### Current Rules

Status Contains 'Active - Office Patient'

Office Provider = [REDACTED]

Age Between 40 Years and 75 Years

Prescription Contains 'zocor' OR Contains 'astatin' OR Contains 'crestor' OR Contains 'lipitor' OR Contains 'pravachol' AND Prescription Status = 'Active'

Preventative Screening (TOP) History Contains 'CV Risk (Male 40-74 | Female 50-74, 5 Yr)' AND Preventative Screening (TOP) Date In the Last 5 Years

Lab Type Contains '10-Year Cardiovascular Disease Risk' AND Observation Date In the Last 5 Years AND Only Check Latest Result Within Observation Date Range AND Include Reviewed Labs

## ESPCN – Quarterly – CVR Eligible

ESPCN - Quarterly - CVR Eligible

### Current Rules

Status Contains 'Active - Office Patient'

Office Provider = [REDACTED]

Age Between 40 Years and 75 Years

Prescription Contains 'zocor' OR Contains 'astatin' OR Contains 'crestor' OR Contains 'lipitor' OR Contains 'pravachol' AND Prescription Status = 'Active'

## Quarterly – QI Queries

You can create the following queries by copying and modifying your Active Panel query, Adult, No Visit in 3 Years query, 75+ Outreach query and Chronic Disease Outreach query. (See 'Outreach Queries' section).

## ESPCN – Quarterly QI – Active Patients (Denominator)

ESPCN - Quarterly QI - Active Patients (Denominator)

### Current Rules

Office Provider = 'Vincent, [REDACTED]'

Status Contains 'Active'

## ESPCN – Quarterly QI – Patients seen in the Last 3 Years (Numerator)

ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator)

### Current Rules

Status = 'Active'

Office Provider = 'Vincent, [REDACTED]'

Appointment Date In the Last 3 Years AND Appointment Provider = 'Vincent, [REDACTED]'

## ESPCN – Quarterly QI – Patients 75+ (Denominator)

ESPCN - Quarterly QI - Patients 75+ (Denominator)

### Current Rules

Status = 'Active'  
Office Provider = 'Vincent, [REDACTED]'  
Age Older Than 75 Years

## ESPCN – Quarterly QI – Patients 75+, Seen in the Last Year (Numerator)

ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator)

### Current Rules

Status = 'Active'  
Office Provider = 'Vincent, [REDACTED]'  
Age Older Than 75 Years  
Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'

## ESPCN – Quarterly QI – Chronic Disease Patients (Denominator)

ESPCN - Quarterly QI - Chronic Disease Patients (Denominator)

### Current Rules

Status = 'Active'  
Office Provider = 'Vincent, [REDACTED]'  
Diagnosis Diagnosis Code Contains '250' OR Contains '401' OR Contains '410' OR Contains '411' OR Contains '412' OR Contains '413' OR Contains '414' OR Contains '420'

## ESPCN – Quarterly QI – Chronic Disease Patients, Seen in the Last Year (Numerator)

ESPCN - Quarterly QI - Chronic Disease Patients, Seen in the Last Year (Numerator)

### Current Rules

Status = 'Active'  
Office Provider = 'Vincent, [REDACTED]'  
Diagnosis Diagnosis Code Contains '250' OR Contains '401' OR Contains '410' OR Contains '411' OR Contains '412' OR Contains '413' OR Contains '414' OR Contains '420'  
Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'

## ESPCN – Quarterly QI – Patients with Diabetes (Denominator)

For the following queries, we will use **'Advanced Logic'**. Up until this point, all our queries have told the EMR to search for Line 1 criteria AND Line 2 criteria AND Line 3 criteria, etc. This is the default for queries in Accuro. If we want to tell the EMR to search for Line 1 criteria OR Line 2 criteria, we can use **Advanced Logic**.

1. Create the following query. Open the 'Alert Definition Options'  > Check off 'Use Advanced Logic' > 'OK'.

ESPCN - Quarterly QI - Patients with Diabetes (Denominator)

Current Rules

Status = 'Active'  
Age Older Than 18 Years  
Office Provider = 'Vincent, Denis'  
Diagnosis Diagnosis Code = '250'  
Lab Type Contains 'a1c' AND Value >= '6.5' AND Include Reviewed Labs  
Lab Type Contains 'FBG' OR Contains 'glucose, fast' AND Value >= '7.0' AND Include Reviewed Labs



Alert Definition Options

Name: QI - Patients with Diabetes (Denominator) Default Display Fields:

Warning:

Alert Priority: Normal

Include in Tasks  Use Advanced Logic

For Users:

Dr. [redacted] Vincent

Physician  
Nurse  
Power User

OK Cancel

2. This will number each line. Click the pencil icon  beside the Advanced Logic sequence to edit it.

ESPCN - Quarterly QI - Patients with Diabetes (Denominator)

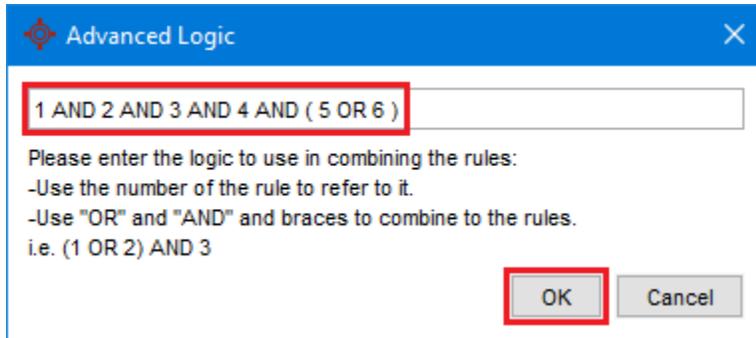
Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND 5 AND 6 

1: Status = 'Active'  
2: Age Older Than 18 Years  
3: Office Provider = 'Vincent, Denis'  
4: Diagnosis Diagnosis Code = '250'  
5: Lab Type Contains 'a1c' AND Value >= '6.5' AND Include Reviewed Labs  
6: Lab Type Contains 'FBG' OR Contains 'glucose, fast' AND Value >= '7.0' AND Include Reviewed Labs

3. We want to search for patients who...
  - a. Are active patients.
  - b. *AND* are over 18 years old.
  - c. *AND* are patients of Dr. Vincent.
  - d. *AND* have been billed with a 250 diagnostic code
  - e. *AND* have an HbA1c result  $\geq 6.5$  *OR* a fasting glucose result  $\geq 7$

...so, our Advanced Logic will look like this.



Your final query should look like this. You can copy it to use as a base for your next two queries.

ESPCN - Quarterly QI - Patients with Diabetes (Denominator)

Current Rules Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 )

---

1: **Status** = 'Active'  
 2: **Age Older Than 18 Years**  
 3: **Office Provider** = 'Vincent, [REDACTED]'  
 4: **Diagnosis Diagnosis Code** = '250'  
 5: **Lab Type** Contains 'a1c' *AND* **Value**  $\geq 6.5$  *AND* **Include Reviewed Labs**  
 6: **Lab Type** Contains 'FBG' *OR* Contains 'glucose, fast' *AND* **Value**  $\geq 7.0$  *AND* **Include Reviewed Labs**

### ESPCN – Quarterly QI – Patients with Diabetes with A1c in the Last Month (Numerator)

ESPCN - Quarterly QI - Patients with Diabetes with A1c in the last month (Numerator)

Current Rules Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) AND 7

---

1: **Status** = 'Active'  
 2: **Age Older Than 18 Years**  
 3: **Office Provider** = 'Vincent, [REDACTED]'  
 4: **Diagnosis Diagnosis Code** = '250'  
 5: **Lab Type** Contains 'a1c' *AND* **Value**  $\geq 6.5$  *AND* **Include Reviewed Labs**  
 6: **Lab Type** Contains 'FBG' *OR* Contains 'glucose, fast' *AND* **Value**  $\geq 7.0$  *AND* **Include Reviewed Labs**  
 7: **Lab Type** Contains 'a1c' *AND* **Observation Date** In the Last 6 Months *AND* **Include Reviewed Labs**

## ESPCN – Quarterly QI – Patients with Diabetes with a DFE in the Last year (Numerator)

ESPCN - Quarterly QI - Patients with Diabetes with a DFE in the last year (numerator)

Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) AND ( 7 OR 8 ) 

- 1: **Status** = 'Active'
- 2: **Age Older Than 18 Years**
- 3: **Office Provider** = 'Vincent, ██████'
- 4: **Diagnosis Diagnosis Code** = '250'
- 5: **Lab Type** Contains 'a1c' AND **Value** >= '6.5' AND **Include Reviewed Labs**
- 6: **Lab Type** Contains 'FBG' OR Contains 'glucose, fast' AND **Value** >= '7.0' AND **Include Reviewed Labs**
- 7: **Form Date** In the Last 1 Year AND **Form** = 'AHS - Diabetes Foot Screening Tool'
- 8: **Form Date** In the Last 1 Year AND **Form Title** Contains 'dfa' OR Contains 'dfe' OR Contains 'diabetic foot' OR Contains 'diabetes foot' OR Contains 'foot exam' OR Contains 'foot screen'

## ESPCN - Quarterly QI – Pts with DM, A1c Result, Uncontrolled -1 year (Numerator)

ESPCN - Quarterly QI - Diabetic Patients with an A1c >8.5 in the Last Year (Numerator)

Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) AND 7 

- 1: **Status** Contains 'Active - Office Patient'
- 2: **Office Provider** = '██████████'
- 3: **Age Older Than 18 Years**
- 4: **Bill Diagnosis Code** Contains '250'
- 5: **Lab Type** Contains 'Hemoglobin A1c' AND **Value** >= '6.5' AND **Include Reviewed Labs**
- 6: **Lab Type** Contains 'Glucose, Fasting' AND **Value** >= '7.0' AND **Include Reviewed Labs**
- 7: **Lab Type** Contains 'Hemoglobin A1c' AND **Value** >= '8.6' AND **Observation Date** In the Last 1 Year AND **Only Check**



## ESPCN - Quarterly QI - Pts with DM, A1c Result - 1 year (Denominator)

ESPCN - Quarterly QI - Diabetic Patients with an A1c in the Last Year (Denominator)

Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) AND 7 

- 1: **Status** Contains 'Active - Office Patient'
- 2: **Office Provider** = '██████████'
- 3: **Age Older Than 18 Years**
- 4: **Bill Diagnosis Code** Contains '250'
- 5: **Lab Type** Contains 'Hemoglobin A1c' AND **Value** >= '6.5' AND **Include Reviewed Labs**
- 6: **Lab Type** Contains 'Glucose, Fasting' AND **Value** >= '7.0' AND **Include Reviewed Labs**
- 7: **Lab Type** Contains 'Hemoglobin A1c' AND **Collection Date** In the Last 1 Year AND **Only Check Latest Result Within**



## ESPCN - Quarterly QI – Pts with HTN, BP Measured, Elevated - 1 year (Numerator)

### ESPCN - Quarterly QI - HTN Patients with an Elevated BP in the Last Year (Numerator)

Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) AND ( 7 OR 8 ) 

- 1: **Status** Contains 'Active - Office Patient'
- 2: **Office Provider** = XXXXXXXXXX
- 3: **Age** Older Than 18 Years
- 4: **Bill Diagnosis Code** Contains '401'
- 5: **Lab Type** Contains 'Systolic' AND **Value** >= '140' AND **Include Reviewed Labs**
- 6: **Lab Type** Contains 'Diastolic' AND **Value** >= '90' AND **Include Reviewed Labs**
- 7: **Lab Type** Contains 'BP - Systolic' AND **Value** >= '140' AND **Observation Date** In the Last 1 Year AND **Include Reviewed Labs**
- 8: **Lab Type** Contains 'BP - Diastolic' AND **Value** >= '90' AND **Observation Date** In the Last 1 Year AND **Include Reviewed Labs**



New Rule	Manage Rule
<p>Rule Category: Labs</p> <p>Lab Result</p>	<p>Lab Result</p> <p>Update Rule Remove Rule</p> <p><input type="checkbox"/> Doesn't Match <input checked="" type="checkbox"/> Patient Records Only <input type="checkbox"/> Optional Instances: 1</p> <p><b>Lab Type:</b> Contains BP - Systolic</p> <p><b>Value:</b> Greater Than or Equal To 140</p> <p><b>Observation Date:</b> In the Last 1 Years</p> <p>+ New</p> <p><input type="checkbox"/> Only Check Latest Result</p> <p><input checked="" type="checkbox"/> Include Reviewed Labs</p> <p><input type="checkbox"/> Only Abnormal Results</p>

## ESPCN - Quarterly QI - Pts with HTN, BP Measured - 1 year (Denominator)

### ESPCN - Quarterly QI - HTN Patients with a BP in the Last Year (Denominator)

Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) AND ( 7 OR 8 ) 

- 1: **Status** Contains 'Active - Office Patient'
- 2: **Office Provider** = XXXXXXXXXX
- 3: **Age** Older Than 18 Years
- 4: **Bill Diagnosis Code** Contains '401'
- 5: **Lab Type** Contains 'Systolic' AND **Value** >= '140' AND **Include Reviewed Labs**
- 6: **Lab Type** Contains 'Diastolic' AND **Value** >= '90' AND **Include Reviewed Labs**
- 7: **Lab Type** Contains 'Systolic' AND **Collection Date** In the Last 1 Year AND **Only Check Latest Result** AND **Include Reviewed Labs**
- 8: **Lab Type** Contains 'Diastolic' AND **Observation Date** In the Last 1 Year AND **Only Check Latest Result** AND **Include Reviewed Labs**



## ESPCN - Quarterly QI – Pts with HTN, BP Measured - 6 months (Numerator)

### ESPCN - Quarterly QI - HTN Patients with a BP in the Last Six Months (Numerator)

Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) AND ( 7 OR 8 ) 

- 1: **Status** Contains 'Active - Office Patient'
- 2: **Office Provider** = '██████████'
- 3: **Age** Older Than 18 Years
- 4: **Bill Diagnosis Code** Contains '401'
- 5: **Lab Type** Contains 'Systolic' AND **Value** >= '140' AND **Include Reviewed Labs**
- 6: **Lab Type** Contains 'Diastolic' AND **Value** >= '90' AND **Include Reviewed Labs**
- 7: **Lab Type** Contains 'Systolic' AND **Collection Date** In the Last 6 Months AND **Only Check Latest Result** AND **Include Reviewed Labs**
- 8: **Lab Type** Contains 'Diastolic' AND **Observation Date** In the Last 6 Months AND **Only Check Latest Result** AND **Include Reviewed Labs**



## ESPCN - Quarterly QI - Pts with HTN (Denominator)

### ESPCN - Quarterly QI - HTN Patients (Denominator)

Current Rules

Advanced Logic: 1 AND 2 AND 3 AND 4 AND ( 5 OR 6 ) 

- 1: **Status** Contains 'Active - Office Patient'
- 2: **Office Provider** = '██████████'
- 3: **Age** Older Than 18 Years
- 4: **Bill Diagnosis Code** Contains '401'
- 5: **Lab Type** Contains 'Systolic' AND **Value** >= '140' AND **Include Reviewed Labs**
- 6: **Lab Type** Contains 'Diastolic' AND **Value** >= '90' AND **Include Reviewed Labs**



## Outreach Queries

### Population/Time Not in Clinic Outreach

Once again, start by copying your 'Active Panel' query and building on for the following queries.

#### ESPCN – Outreach – Pediatrics, No Visit in 2 years

ESPCN - Outreach - Pediatrics, No Visit in 2yrs

##### Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status Contains 'Active'  
Age Younger Than 18 Years  
Appointment Date In the Last 2 Years AND Appointment Provider = 'Vincent, [REDACTED]'  
Appointment Date In the Next 3 Months

#### ESPCN – Outreach – Adults, No Visit in 3 Years

ESPCN - Outreach - Adults, No Visit in 3yrs

##### Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status Contains 'Active'  
Age Between 18 Years and 75 Years  
Appointment Date In the Last 3 Years AND Appointment Provider = 'Vincent, [REDACTED]'  
Appointment Date In the Next 3 Months

#### ESPCN – Outreach - 75+, No Visit in 1 Year

ESPCN - Outreach - 75+, No Visit in 1 year

##### Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status Contains 'Active'  
Age Older Than 75 Years  
Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'  
Appointment Date In the Next 3 Months

## ESPCN – Outreach - Chronic Disease, No Visit in 1 Year Outreach

ESPCN - Outreach - Chronic Disease, No visit in 1 year

### Current Rules

**Office Provider** = 'Vincent, [REDACTED]  
**Status** = 'Active'  
**Age** Younger Than 75 Years  
**Diagnosis** **Diagnosis Code** Contains '250' OR Contains '401' OR Contains '413' OR Contains '414' OR Contains '428' OR Contains '496' OR  
**Appointment Date** In the Last 1 Year AND **Appointment Provider** = 'Vincent, [REDACTED]  
**Appointment Date** In the Next 3 Months  
**Order Type** Contains 'Adults, No Appt. in 3 Years' AND **Order Order Date** In the Last 3 Months

The chronic disease codes are:

250 Diabetes  
401 Hypertension  
410 Acute MI  
411 Other Acute & Subacute MI  
412 Old MI  
413 Angina  
414 Other forms of Chronic Ischemic Heart Disease  
420 Acute Pericarditis  
421 Acute and Subacute Endocarditis  
422 Acute Myocarditis  
423 Other Diseases of Pericardium  
424 Other Diseases of Endocardium  
425 Cardiomyopathy  
426 Conduction Disorders  
427 Cardiac Dysrhythmias  
428 Heart Failure  
429 Ill-defined Descriptions of Heart Disease  
440 Atherosclerosis  
441 Aortic Aneurysm  
491 Chronic Bronchitis  
492 Emphysema  
496 Chronic Airway Obstruction  
585 Chronic Renal Failure  
586 Renal Failure, Unspecified

**NOTE:** For Chronic Disease Outreach and the five Screening Outreach queries, we also add a line to exclude patients who have had an order applied for 'Adult, No Appt. in 3 Years' outreach within the last three months to avoid duplication of work.

## Screening Outreach Queries

An easy way to create your outreach queries for screening due and no appointment in one year is to copy the 'due' query you created earlier for each respective screen and add your appointment criteria as well as the Adult Outreach order exclusion criteria.

### ESPCN – Outreach - Pap Due, No Visit in 1 Year

ESPCN - Outreach - Pap Due, No visit in 1 year

Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Sex = 'Female'  
Age Between 25 Years and 70 Years  
Medical Hist Note Contains 'hysterectomy'  
Preventative Screening History Contains 'Total Laparoscopic Hysterectomy'  
Lab Type Contains 'PAP' AND Observation Date In the Last 3 Years AND Only Check Latest Result AND Include Reviewed Labs  
Lab Type Contains 'DKML Cytology Gynecological' AND Observation Date In the Last 3 Years AND Only Check Latest Result AND Include Reviewed Labs  
Document Created Date In the Last 3 Years AND Document Sub-Type Contains 'gynecology'  
Preventative Screening History Contains 'PAP' AND Preventative Screening Date In the Last 3 Years  
Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'  
Appointment Date In the Next 3 Months  
Order Type Contains 'Adults, No Appt. in 3 Years' AND Order Order Date In the Last 3 Months

### ESPCN – Outreach - Mammo Due, No Visit in 1 Year

ESPCN - Outreach - Mammo Due, No visit in 1 year

Current Rules

Office Provider = 'Vincent, [REDACTED]'  
Status = 'Active'  
Sex = 'Female'  
Age Between 45 Years and 75 Years  
Lab Type Contains 'mammo' AND Observation Date In the Last 2 Years AND Only Check Latest Result AND Include Reviewed Labs  
Document Created Date In the Last 2 Years AND Document Sub-Type Contains 'mammo'  
Preventative Screening History Contains 'Mammography' AND Preventative Screening Date In the Last 2 Years  
Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'  
Appointment Date In the Next 3 Months  
Order Type Contains 'Adults, No Appt. in 3 Years' AND Order Order Date In the Last 3 Months

## ESPCN – Outreach - CRC Due, No Visit in 1 Year

ESPCN - Outreach - CRC Due, No visit in 1 year

### Current Rules

Office Provider = 'Vincent, [REDACTED]'

Status = 'Active'

Age Between 50 Years and 75 Years

Lab Type Contains 'Fecal Immunochemical Test' OR Contains 'Fecal Immunochemical Test (FIT)' AND Observation Date In the Last 2 Years AND Only Check Latest Result AND Include Reviewed Labs

Lab Type Contains 'Sigmoidoscopy' AND Observation Date In the Last 5 Years AND Only Check Latest Result AND Include Reviewed Labs

Lab Type Contains 'Colonoscopy' AND Observation Date In the Last 10 Years AND Only Check Latest Result AND Include Reviewed Labs

Document Created Date In the Last 2 Years AND Document Sub-Type Contains 'fr'

Document Created Date In the Last 5 Years AND Document Sub-Type Contains 'sigmoid'

Document Created Date In the Last 10 Years AND Document Sub-Type Contains 'colonoscopy'

Preventative Screening History Contains 'Colorectal Cancer Screen' OR Contains 'FIT Test' AND Preventative Screening Date In the Last 2 Years

Preventative Screening History Contains 'Flex Sigmoidoscopy' AND Preventative Screening Date In the Last 5 Years

Preventative Screening History Contains 'Colonoscopy' AND Preventative Screening Date In the Last 10 Years

Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'

Appointment Date In the Next 3 Months

Order Type Contains 'Adults, No Appt. in 3 Years' AND Order Order Date In the Last 3 Months

## ESPCN – Outreach - Diabetes Due, No Visit in 1 Year

ESPCN - Outreach - Diabetes Due, No visit in 1 year

### Current Rules

Office Provider = 'Vincent, [REDACTED]'

Status = 'Active'

Age Older Than 40 Years

Lab Type Contains 'Glucose, fasting' AND Observation Date In the Last 5 Years AND Only Check Latest Result AND Include Reviewed Labs

Lab Type Contains 'a1c' AND Observation Date In the Last 5 Years AND Only Check Latest Result AND Include Reviewed Labs

Document Created Date In the Last 5 Years AND Document Description Contains 'glucose, fast' OR Contains 'a1c'

Preventative Screening History Contains 'Diabetes Screening' AND Preventative Screening Date In the Last 5 Years

Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'

Appointment Date In the Next 3 Months

Order Type Contains 'Adults, No Appt. in 3 Years' AND Order Order Date In the Last 3 Months

## ESPCN – Outreach - Lipids Due, No Visit in 1 Year

ESPCN - Outreach - Lipids Due, No visit in 1 year

### Current Rules

Office Provider = 'Vincent, [REDACTED]'

Status = 'Active'

Age Between 40 Years and 75 Years

Prescription Contains 'astatin' OR = 'crestor' OR = 'zocor' OR = 'lipitor' OR = 'pravachol' AND Prescription Status = 'Active'

Observation Date In the Last 5 Years AND Lab Test Contains 'lipid' OR Contains 'cardiovascular disease risk' AND Only Check Latest Result AND Include Reviewed Labs

Document Created Date In the Last 5 Years AND Document Description Contains 'lipid'

Preventative Screening History Contains 'Lipid Panel' OR Contains 'Lipid Profile' AND Preventative Screening Date In the Last 5 Years

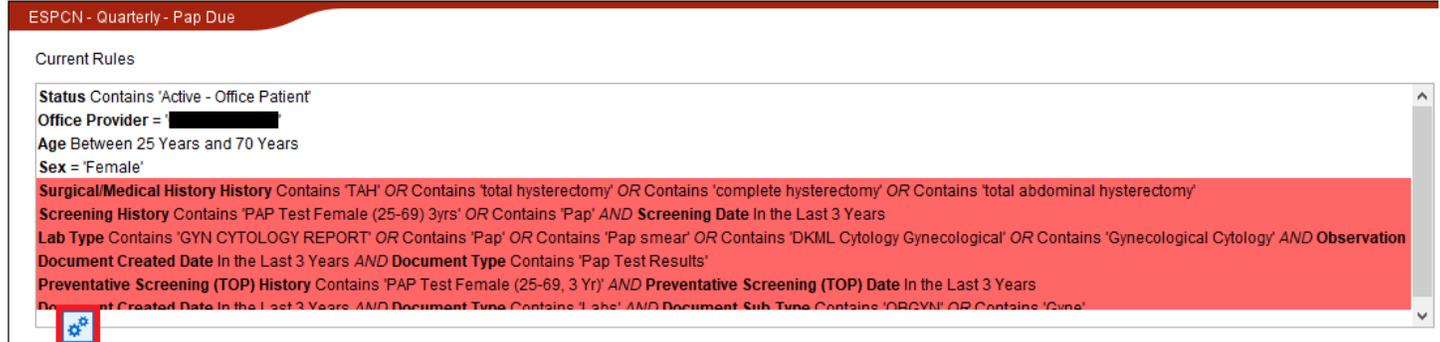
Appointment Date In the Last 1 Year AND Appointment Provider = 'Vincent, [REDACTED]'

Appointment Date In the Next 3 Months

Order Type Contains 'Adults, No Appt. in 3 Years' AND Order Order Date In the Last 3 Months

## Notification Queries

To turn on notifications in Accuro for patients due for one of the five screens, open the corresponding 'due' query and navigate to 'Alert Definition Options' 

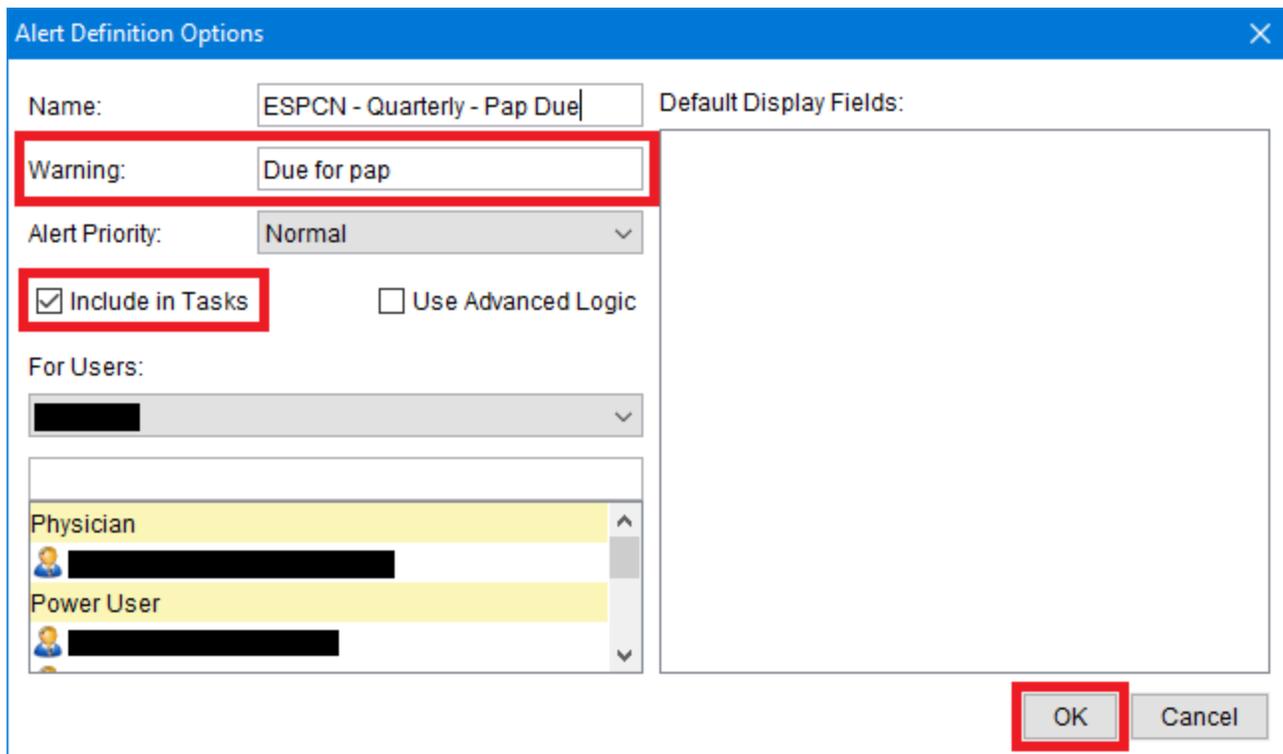


ESPCN - Quarterly - Pap Due

Current Rules

Status Contains 'Active - Office Patient'  
Office Provider = [REDACTED]  
Age Between 25 Years and 70 Years  
Sex = 'Female'  
Surgical/Medical History History Contains 'TAH' OR Contains 'total hysterectomy' OR Contains 'complete hysterectomy' OR Contains 'total abdominal hysterectomy'  
Screening History Contains 'PAP Test Female (25-69) 3yrs' OR Contains 'Pap' AND Screening Date In the Last 3 Years  
Lab Type Contains 'GYN CYTOLOGY REPORT' OR Contains 'Pap' OR Contains 'Pap smear' OR Contains 'DKML Cytology Gynecological' OR Contains 'Gynecological Cytology' AND Observation Document Created Date In the Last 3 Years AND Document Type Contains 'Pap Test Results'  
Preventative Screening (TOP) History Contains 'PAP Test Female (25-69, 3 Yr)' AND Preventative Screening (TOP) Date In the Last 3 Years  
Document Created Date In the Last 3 Years AND Document Type Contains 'Labs' AND Document Sub Type Contains 'OB/GYN' OR Contains 'Gyna'

From this window, enter the text you'd like to show in the patient's chart under 'Warning' and check off 'Include in Tasks'. Select 'OK' to save.



Alert Definition Options

Name:  Default Display Fields:

Warning:

Alert Priority:

Include in Tasks  Use Advanced Logic

For Users:

Physician  
[REDACTED]

Power User  
[REDACTED]

There will now be a warning that shows beside the patient's name in their chart if they are due for any screening.



 Patient: [REDACTED], [REDACTED] DOB [REDACTED]  
Office Provider: Dr. [REDACTED]

## Tracking Queries

These tracking queries will allow our PCCA's to easily quantify their work at the end of each week by pulling the number of orders applied by type.

### ESPCN - Tracking – Pediatrics, 2 Years No Visit Outreach in the Last Week

ESPCN - Tracking - Pediatrics, 2 Years No Visit Outreach

Current Rules

**Order Type** Contains 'Pediatrics, no visit in 2yrs' **AND Order Order Date** In the Last 5 Days

### ESPCN - Tracking – Adult, 3 Years No Visit Outreach in the Last Week

ESPCN - Tracking - Adult, No visit in 3 yrs Outreach

Current Rules

**Order Type** Contains 'No visit in 3+ yrs' **AND Order Order Date** In the Last 5 Days

### ESPCN - Tracking – 75+, No Visit in 1 Year, Outreach in the Last Week

ESPCN - Tracking - 75+, No Visit in 1 Year Outreach

Current Rules

**Order Type** Contains '75+, No Visit in 1 Year Outreach' **AND Order Order Date** In the Last 5 Days

### ESPCN - Tracking – Chronic Disease, No Visit in 1 Year, Outreach in the Last Week

ESPCN - Tracking - Chronic Disease, No Visit in 1 Year Outreach

Current Rules

**Order Type** Contains 'Chronic disease, No Visit in 1 Year Outreach' **AND Order Order Date** In the Last 5 Days

### ESPCN - Tracking – Screening Due, No Visit in 1 Year, Outreach in the Last Week

NEW ESPCN - PCCA Tracking - Screening outreach

Current Rules

**Order Type** Contains 'Screening Outreach by PCCA' **AND Order Order Date** In the Last 7 Days

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

ESPCN - Tracking - Screening Reviewed by PCCA

Current Rules

**Order Type** Contains 'Screening reviewed by PCCA' *AND* **Order Order Date** In the Last 5 Days

## ESPCN - Tracking – CPAR Conflict

ESPCN - Tracking - CPAR Conflict Outreach

Current Rules

**Order Type** Contains 'CPAR Conflict Outreach' *AND* **Order Order Date** In the Last 5 Days