



Accuro PCCA Setup Guide

Updated October 2024

*****Important Notice*****

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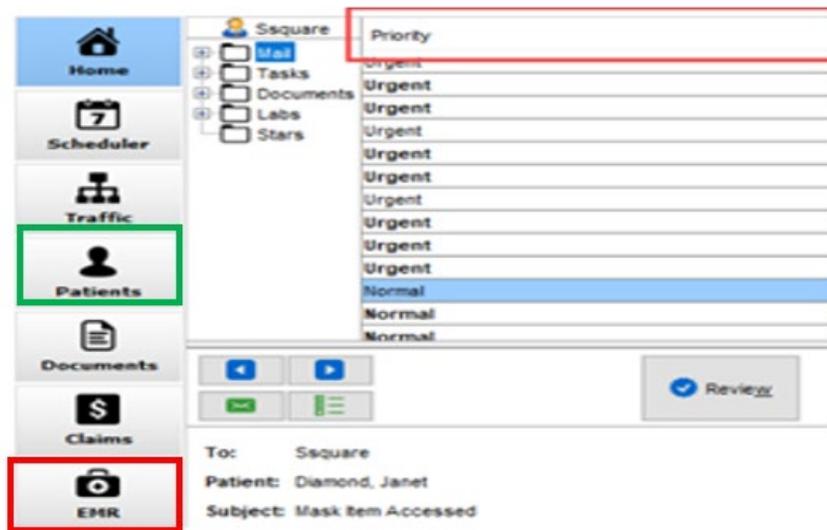
Introduction

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.



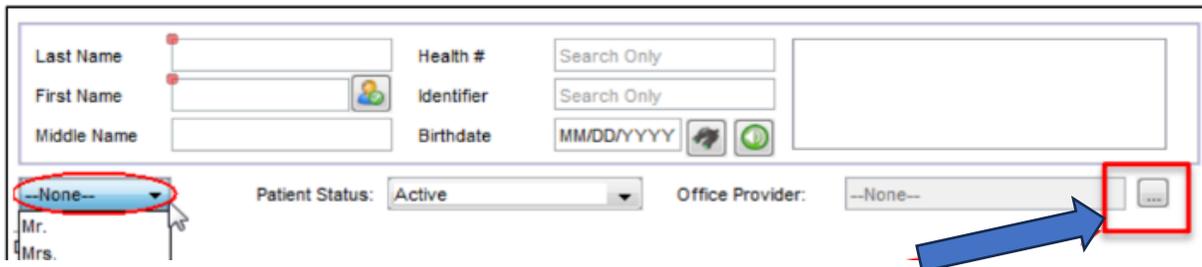
Three-line and dot icon – All tasks assigned to somebody will be in here, filtering to tasks directly assigned to one provider is in here, this will be discussed further later.

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"/>	<div style="border: 1px solid gray; width: 100%; height: 100%;"></div>		
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="✖"/>

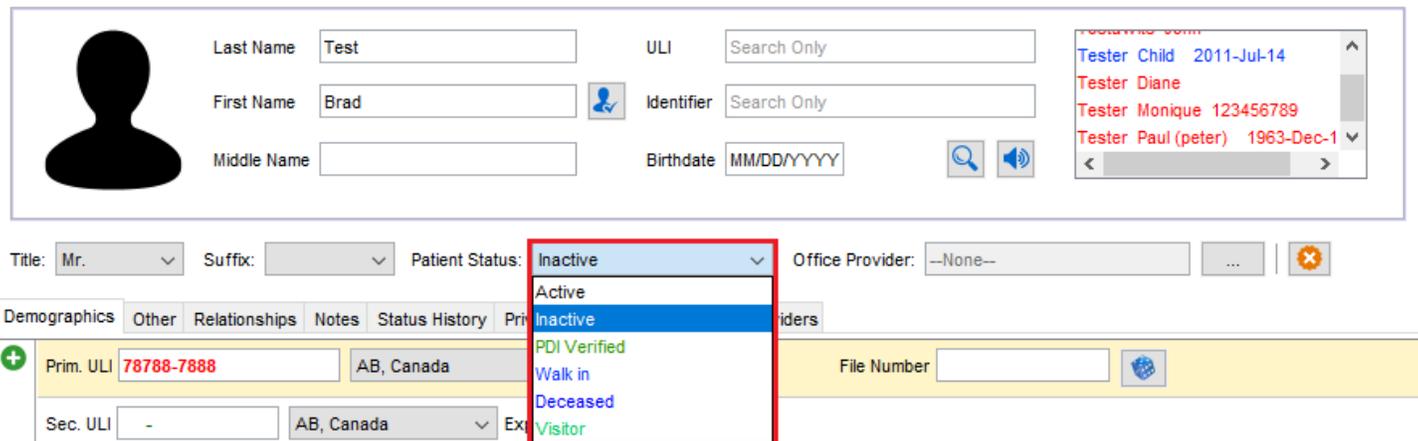
To set the Office Provider



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

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, Birthdate, Title, Suffix, Patient Status, and Office Provider. The Patient Status dropdown is currently set to "Inactive" and is highlighted with a red box. A list of patient status options is displayed, including "Active", "Inactive", "PDI Verified", "Walk in", "Deceased", and "Visitor".

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 Entry:

- Last Name: Test
- First Name: Brad
- Middle Name: [Empty]
- ULI: Search Only
- Identifier: Search Only
- Birthdate: MM/DD/YYYY
- Office Provider: --None--

Buttons: [Search], [Speaker], [Dropdown Arrow]

Dropdown List (Office Provider):

- Tester Child 2011-Jul-14
- Tester Diane
- Tester Monique 123456789
- Tester Paul (peter) 1963-Dec-1

Buttons: [Previous], [Next]

Title: Mr. Suffix: [Empty] Patient Status: Inactive

Office Provider: --None-- [Dropdown Arrow] [Orange X Icon]

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  2024-Oct-11.

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.

Form for Patient Information Entry (Example):

- Patient: Test, Minnie Mouse 1981-Sep-06 (42 Yr female) 99999-9999 h:(000) ___-___ c: (000) ___-___ w:(000) ___-___
- Preferred Contact Method: None Primary Physician:
- Last Name: Test
- First Name: Minnie Mouse
- Middle Name: [Empty]
- ULI: Search Only
- Identifier: Search Only
- Birthdate: MM/DD/YYYY
- Office Provider: Jeffery, Glenn

Buttons: [Search], [Speaker], [Dropdown Arrow]

Dropdown List (Office Provider):

- Test Nathan 2015-Nov-25

Title: Mrs. Suffix: [Empty] Patient Status: Active

Office Provider: Jeffery, Glenn [Dropdown Arrow] [Green Calendar Icon] 2024-Jan-09

Demographics Other Relationships

Alias

Prim. ULI: 99999-9999

Sec. ULI: -

Birthdate: 09/06/1981

Family Physician: --None-- Ref By: --None--

Person Type: [Dropdown Arrow] New Born Adoption [Dropdown Arrow]

Verify Patient Demographics

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?

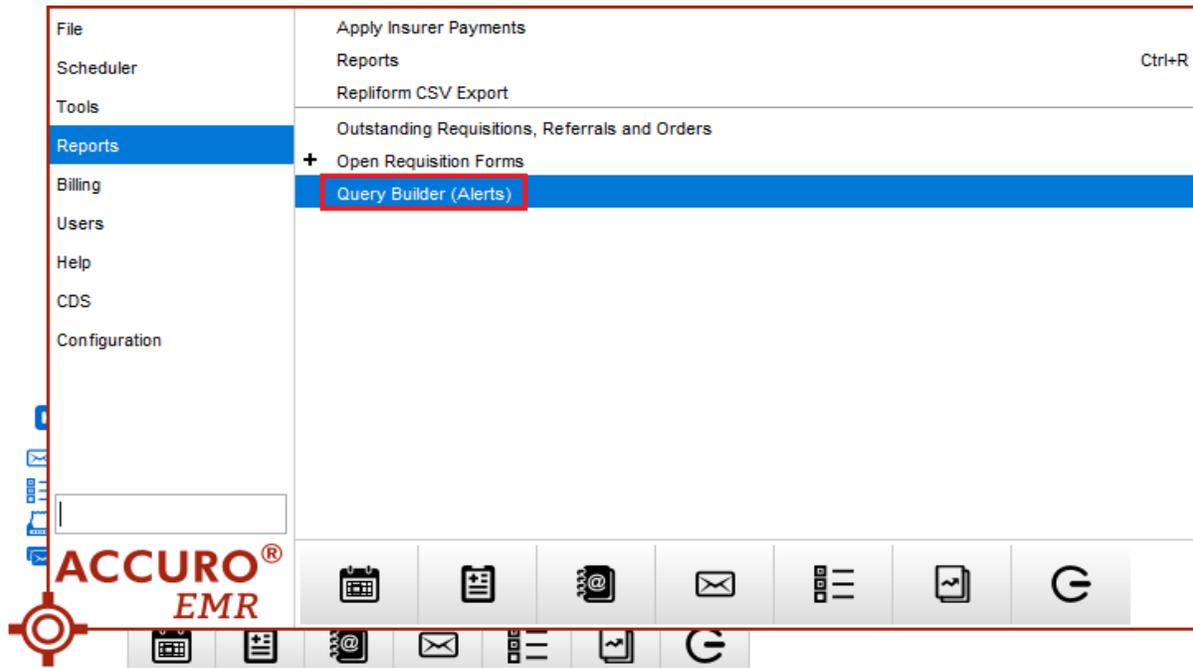
Remember my choice and do not show this message again.

Yes No

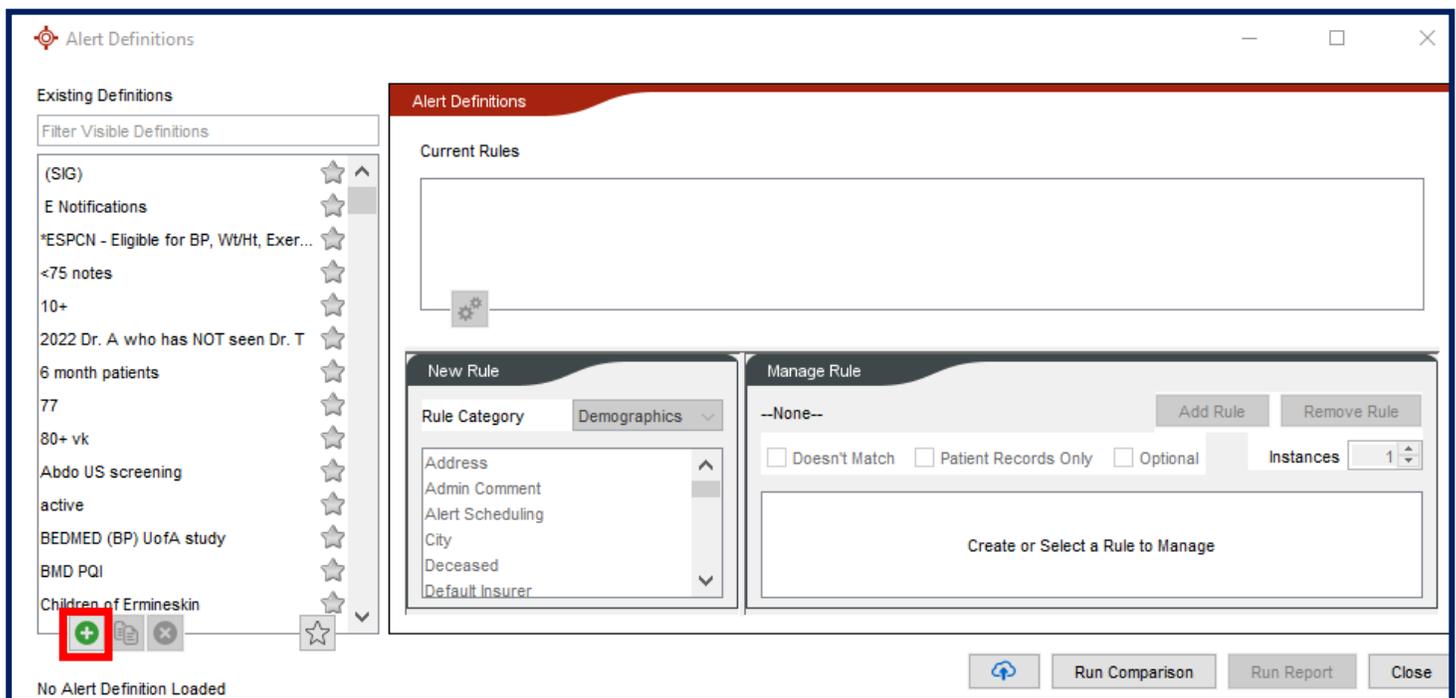
Building Queries

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.

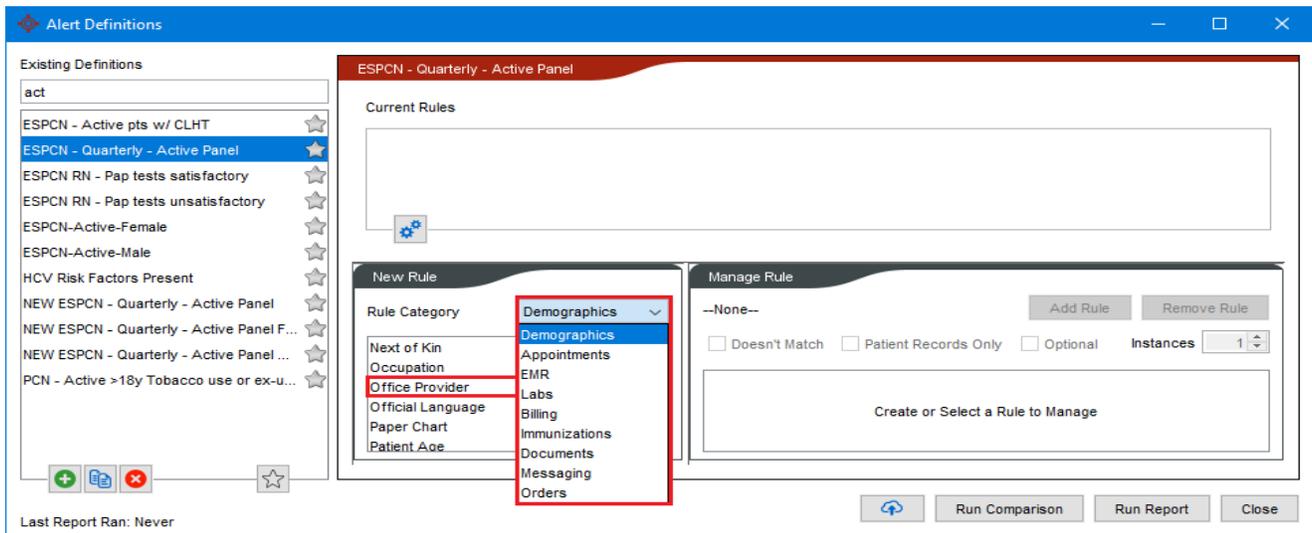
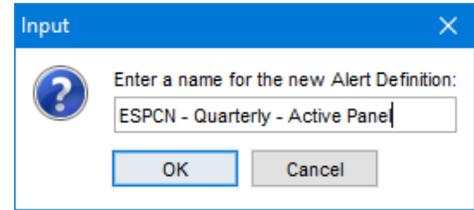


You will be prompted to name your new query (you can change this later if needed).

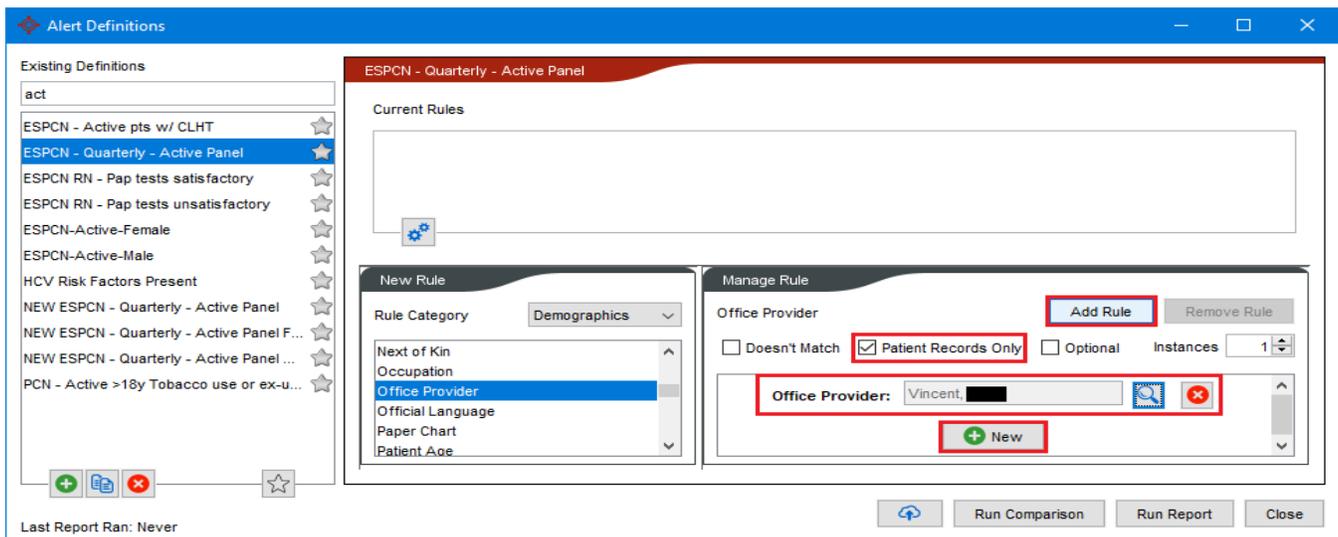
ESPCN – Active Panel

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.)*

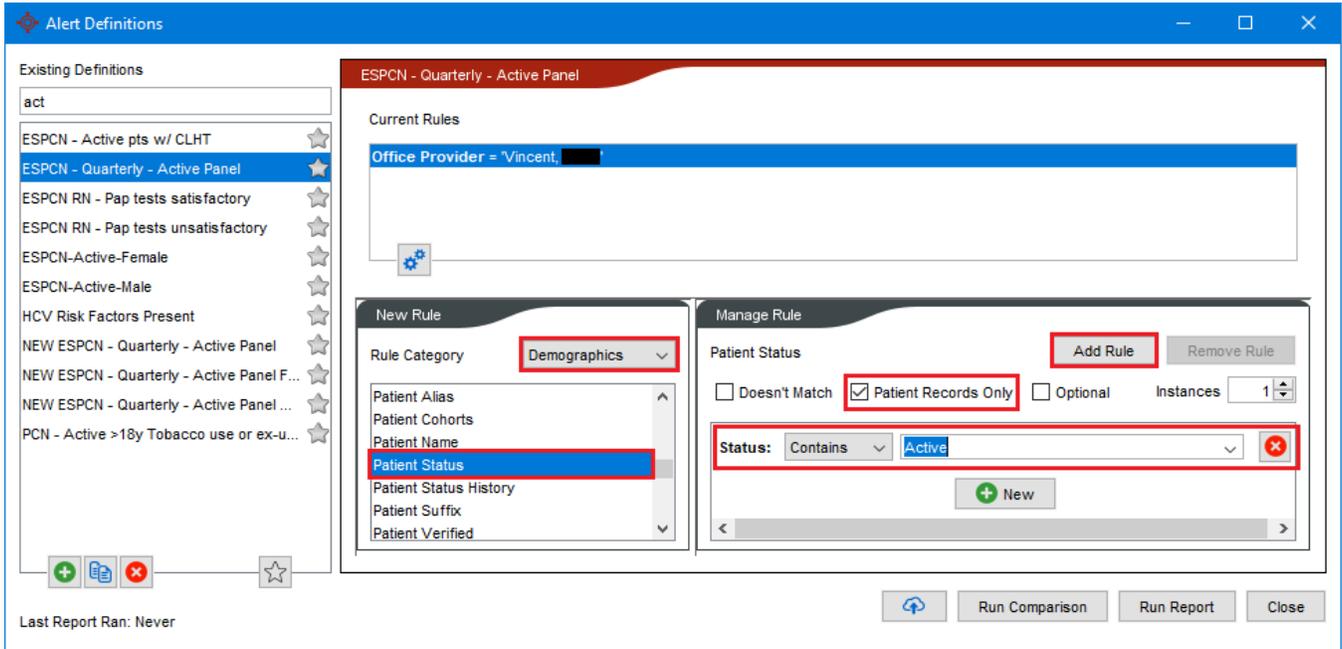
From here, you can start adding specific criteria to your query. Select the section of the chart you want to your query line to search from in the **'Rule Category'** dropdown menu under **'New Rule'**. Then, select the specific type of information from the list provided. Here, we will start with **'Office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



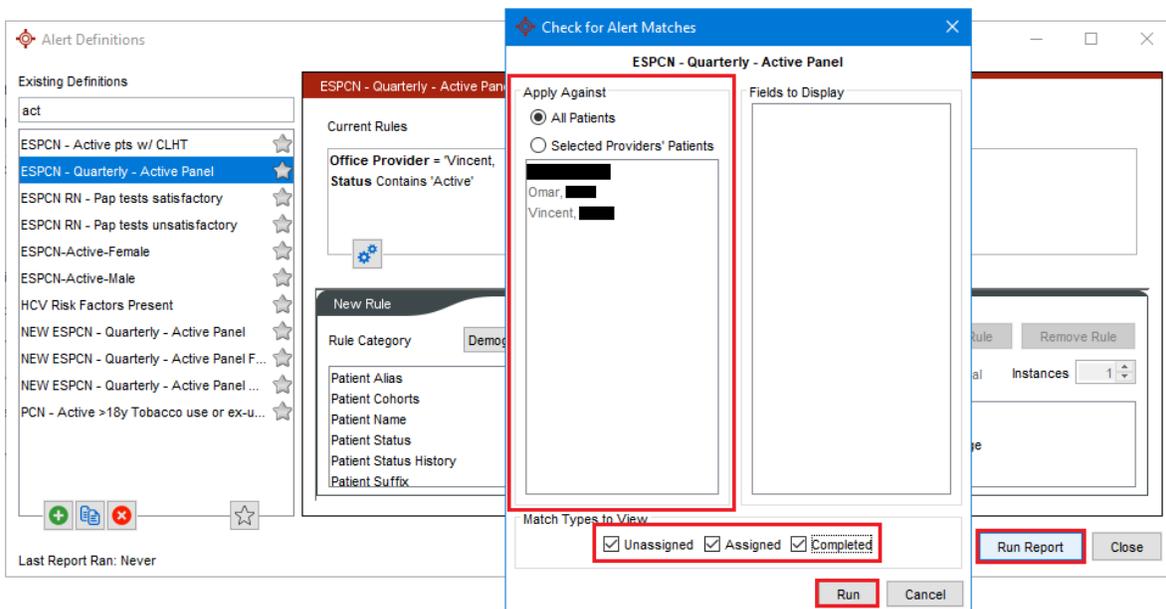
Repeat the process for your 'Status' line, selecting 'Demographics' > 'Patient Status' > 'Patient Records Only' > 'New' > 'Status: Active' > 'Add Rule'



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.

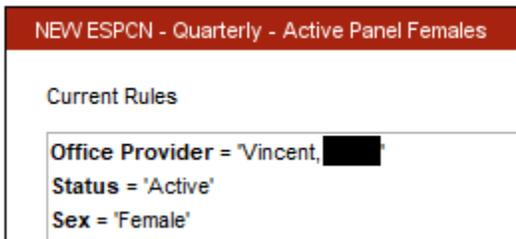


ESPCN - Quarterly – Panel Queries

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.

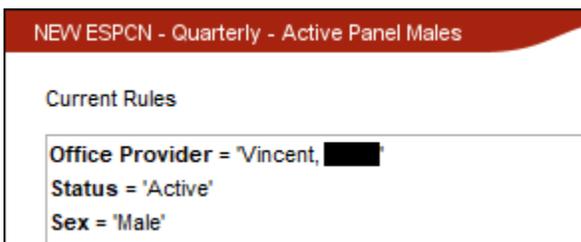


ESPCN – Quarterly – Panel Females



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.



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.

ESPCN – Quarterly – Age **-**

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: ▾ ▾ ▾

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: ▾ ▾ ▾

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 for creating and managing rules. The left window, titled 'New Rule', has 'Rule Category' set to 'Labs' and 'Lab Result' as the selected rule type. The right window, titled 'Manage Rule', shows the configuration for a 'Lab Result' rule. The 'Doesn't Match' and 'Patient Records Only' checkboxes are highlighted in red. 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 three 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 [redacted]
Nurse [redacted]
Power User [redacted]

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)

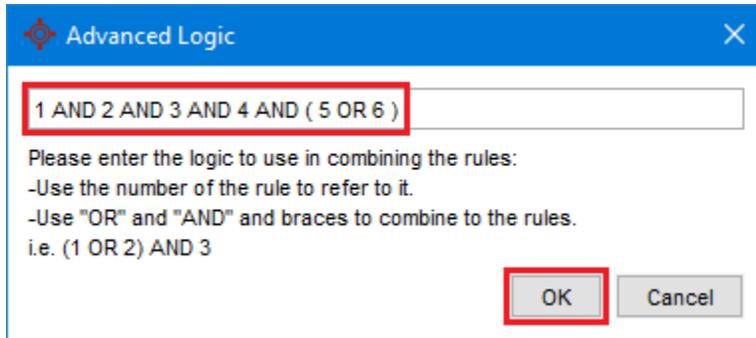
Current Rules

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 ≥ 6.5 *OR* a fasting glucose result ≥ 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** ≥ 6.5 *AND* **Include Reviewed Labs**
 6: **Lab Type** Contains 'FBG' *OR* Contains 'glucose, fast' *AND* **Value** ≥ 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** ≥ 6.5 *AND* **Include Reviewed Labs**
 6: **Lab Type** Contains 'FBG' *OR* Contains 'glucose, fast' *AND* **Value** ≥ 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, [REDACTED]'
- 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'

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 - 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

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

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.

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

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

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 '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 '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

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

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'

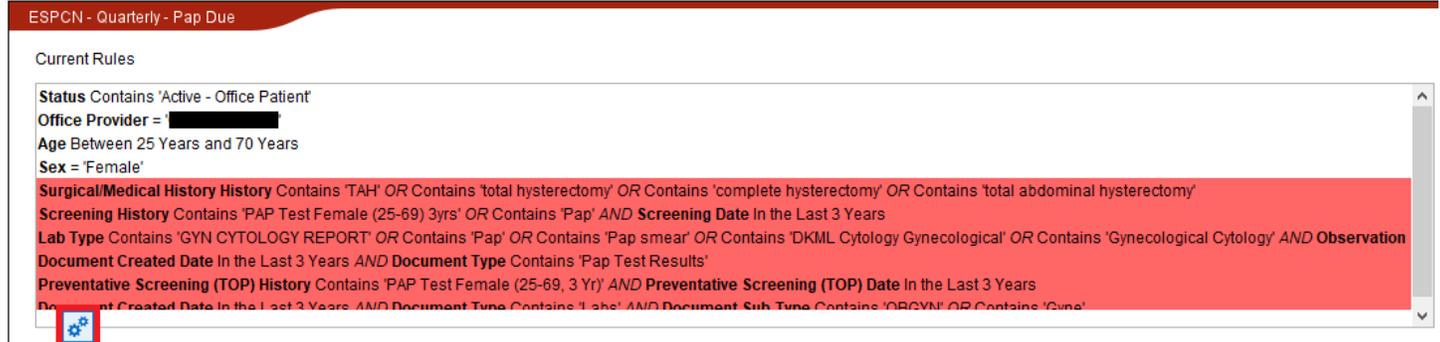
Preventative Screening History Contains 'Lipid Panel' OR Contains 'Lipid Profile' AND Preventative Screening Date In the Last 5 Years

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

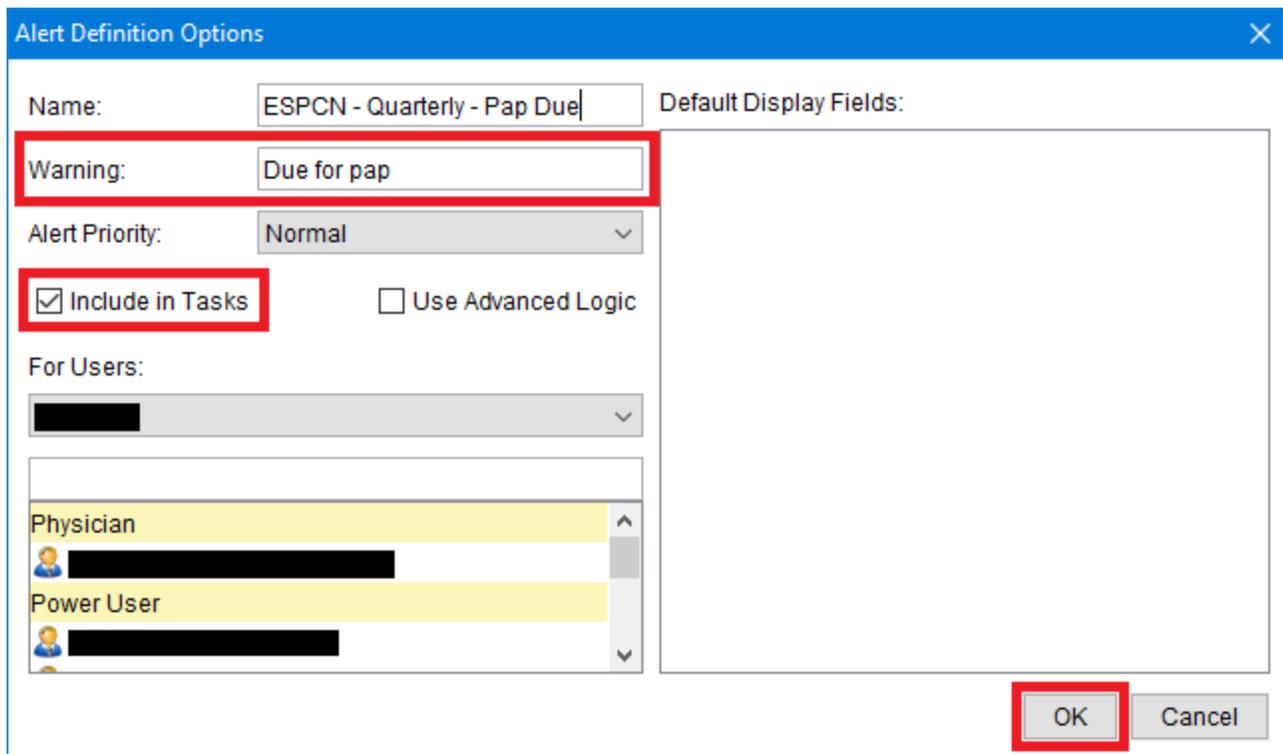
Appointment Date In the Next 3 Months

Notification Queries

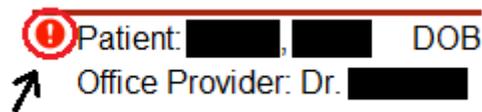
To turn on notifications in Accuro for patients due for one of the five screens, open the corresponding 'due' query and navigate to 'Alert Definition Options' 



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.



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



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