



Med Access PCCA Setup

Updated June 2025

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

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BUILDING TASK TEMPLATES

Access the Templates menu to open the Template Management Menu.

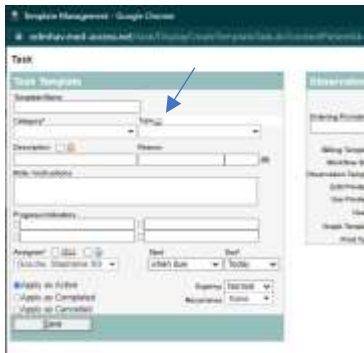


Go to the Tasks tab and select New.



You will need to create a few tasks.

There is a button you can click on if you hover your cursor to the right of where it says Type. Click this button. You need to create additional task types for the PCCA. You will need to add in No Appt in 3 Years, Chronic Disease Outreach, 75+ Outreach and Screening Outreach.



To add in the new task types, click on the description line and enter the name you would like to add. Then click the add button. Add in each additional task type. If you would like to change the order that they appear in the list, change the sort number. The lower the number, the higher in the list it appears. When you are done, select the return button to go back to the previous screen, do not just close the window as your list will not update.



Screening Reviewed by PCCA

Setup as per the below image. The PCCA can select the reason the chart was reviewed by accessing the Type dropdown. This task is used anytime a PCCA reviewed Netcare for screening results (screening outreach or once a patient confirms attachment with the other outreach calls).

The screenshot shows a 'Task' form with the following fields and options:

- Category***: Patient followup
- Type**: (Empty dropdown)
- Description**: Screening Reviewed by PCCA
- Reason**: (Empty dropdown)
- Note / Instructions**: Enter new note/instructions here
- Progress Indicators**: Two empty checkboxes
- Assignee***: Gosche, Stephanie
- Start**: 24-Oct-2023
- Due***: 24-Oct-2023
- Update or Forward**: (Radio button)
- Complete this task**: (Radio button, selected)
- Urgency**: Normal
- Recurrence**: None
- Buttons**: Save, Preview

Patient Outreach

This is used for patients who do not get a Netcare screening review prior to contacting. You would use this as the initial task for No Appt in 3 Years, Chronic Disease, and 75+ Outreach. Then once the patient confirms attachment the PCCA could review Netcare and apply a Screening Reviewed by PCCA task.

The screenshot shows a 'Task' form with the following fields and options:

- Category***: Patient followup
- Type**: (Empty dropdown)
- Description**: Patient Outreach
- Reason**: (Empty dropdown)
- Note / Instructions**: Enter new note/instructions here
- Progress Indicators**: Two empty checkboxes
- Assignee***: Gosche, Stephanie
- Start**: 24-Oct-2023
- Due***: 24-Oct-2023
- Update or Forward**: (Radio button)
- Complete this task**: (Radio button, selected)
- Urgency**: Normal
- Recurrence**: None
- Buttons**: Save, Preview

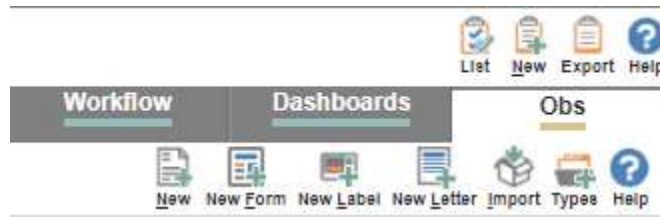
You also need to create task types for adding in results found on Netcare. There are a few steps required to create these task templates. If the clinic is okay with the PCCA importing Mammograms, Colonoscopies and Sigmoidoscopies into the EMR then you do not need to create those additional task templates. See below for how to add result tasks.

Adding Result Tasks to Med Access

1. Create observations. The observations need to be named the same as what you are trying to capture if the results came in directly to the clinic via e-delivery or the clinics import processes.
2. Create a task template that uses the observations you created.
3. Use a test patient to confirm that the task templates update the goals and are reflected in the reports.

FIT Test Results

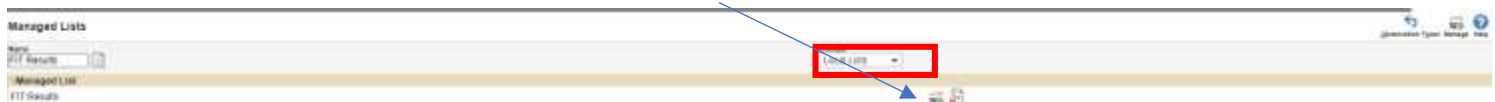
While in the template menu go into Observations (Obs). Select Types so you can create the dropdown results for your lab.



Then select Lists.






Then select Manage. In the description box enter the name you would like to have the dropdown called. Name it FIT Results. Then click the Return button. When you have returned to you Managed Lists page, search in the name field for FIT Results. Then you will select the Edit Managed List button.

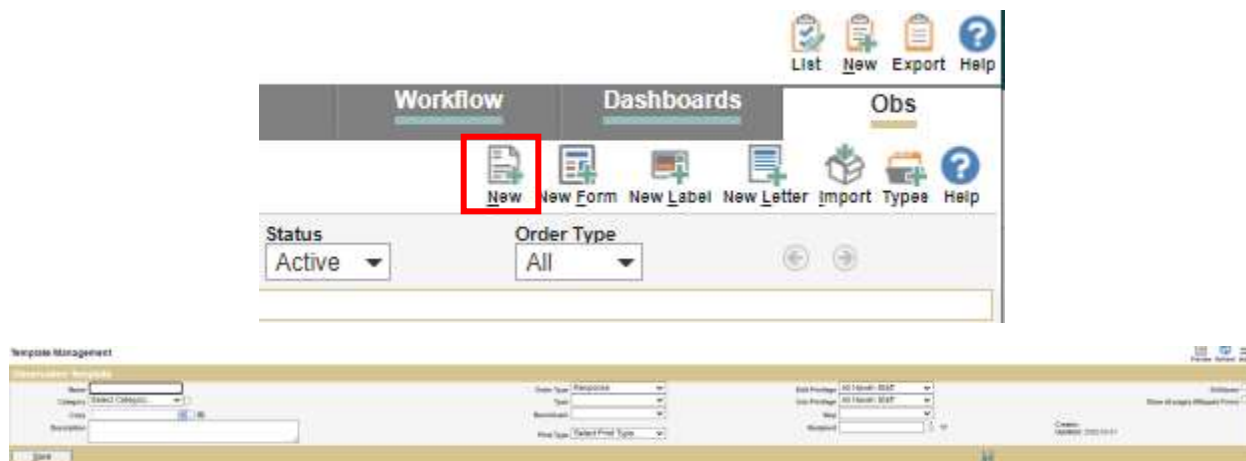


You will then add the items you would like to have appear in your dropdown for your FIT result. In the description field add in Negative and select the add button. Also add in Positive and select the add button. If you need to change the order they appear in, change the numbers in the sort field. If the numbers in the sort field are the same, the items will populate in alphabetical order.



Once completed, select the return button , Observation Types , Templates .

While in the template menu go into Observations (Obs). Select New. The Template Management window will open.



Add in the observation template name: FIT Results


Category: Labs

Description: Fecal Immunochemical Test Results

Order Type: Response

Edit Privilege: All Staff

Use Privilege: All Staff

Then click the floppy disc  to save and continue. Right click on the menu in the top right corner. Select add new observation.

The screenshot shows the 'Observation Type' configuration form. The 'Observation Name' field is filled with 'Fecal Immunochemical Test'. The 'Data Type' dropdown is set to 'Dropdown'. The 'Managed List' dropdown is set to 'FIT Results'. The 'Order' dropdown is set to 'ID'. The 'Increment' dropdown is set to '1'. The 'Units/Format' field is empty. The 'Display Range' field is empty. The 'Lower Range' field is empty. The 'Upper Range' field is empty. The 'Orddisown Template' dropdown is set to 'All'. The 'Default Graph Template' dropdown is empty. The 'Name Format (CSS)' section has several checkboxes for formatting options. The 'Value Format (CSS)' section has several checkboxes for formatting options. The 'Disable Comment' checkbox is checked. The 'Validation' dropdown is set to 'None'. The 'Mapped Display Field' dropdown is empty. The 'Calculation' dropdown is empty. The 'User Defined Calculation Expression' field is empty. The 'Print Type' dropdown is set to 'None'. The 'Allergy Classification' dropdown is empty. The 'Parent Flag & ID' field is empty. The 'Use Privilege' dropdown is set to 'Public'. The 'Edit Privilege' dropdown is set to 'Public'. The 'Auto Inverse Drilldown' checkbox is checked. The 'Don't Display Value in History' checkbox is checked. The 'Allow Overflow' checkbox is checked. The 'Apply' and 'Save' buttons are at the bottom left.

Observation Name: Fecal Immunochemical Test

Data Type: Dropdown

Managed List: FIT Results (this is the list you just created)

Then click apply.

Next, while in the Templates window, go into Tasks. Select New

Access the Templates menu to open the Template Management Menu. Go to the Tasks tab and select New.



You will now create the task template that will pull in the observation template you created.

Two side-by-side screenshots of the application. The left screenshot shows the 'Task Template' form with fields for Template Name (FIT Results), Category (Lab), Description (Fecal Immunochemical Test Results), and Assignee (Assign to user). The right screenshot shows the 'Observation Details & Usage' form with dropdowns for Billing Template, Observation Template (FIT Results), Edit Privilege, Use Privilege, Image, Graph Template, and Print Type (Results).

Template Name: FIT Results

Category: Lab

Description: Fecal Immunochemical Test Results

Assignee: Assign to user

Apply as Completed

Observation Template (right side): FIT Results

Print Type (right side): Results

Then click save. Your task template is now complete. It will need to be marked as a favourite for the PCCA once their Med Access is set up.

Diabetes Screening Results

For the observations:

Observation Template

Name: Diabetes Screening Result
Category: Lab
Description: Diabetes Screening Results

Order Type: Response
Type:
Step:
Print Type: Select Print Type

Edit Privilege: All Users
Use Privilege: All Users

Recipient:
Creator: Ray, Samertha
Updated: 2021-05-07

Drilldown:
Show all pages (Mapped Form):
Save

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Glucose, Fasting			1			14771-	
Hemoglobin A1c			1			4548-4	

Observation Type

Observation Name: Glucose, Fasting
CDS Criteria:
Data Type: Numeric
Managed List:
Order: 1
Increment:
Instruction/Note:
Question:
Units/Format:
Display Range:
Lower Range:
Upper Range:
Drilldown Template:
Code: 14771-5
Default Graph Template: *Diabetes Monitoring
Fasting Glucose, Glucose Fasting
Name Format (CSS):
Value Format (CSS):
Disable Comment:
Validation:
Mapped Display Field:
Calculation:
User Defined Calculation Expression:
Apply Save

Observation Type

Observation Name: Hemoglobin A1c
CDS Criteria:
Data Type: Numeric
Managed List:
Order: 1
Increment:
Instruction/Note:
Question:
Units/Format:
Display Range:
Lower Range:
Upper Range:
Drilldown Template:
Code: 4548-4
Default Graph Template: *Diabetes Monitoring
a1c, hemoglobin a1c/total hemoglobin
Name Format (CSS):
Value Format (CSS):
Disable Comment:
Validation:
Mapped Display Field:
Calculation:
User Defined Calculation Expression:
Apply Save

For the task template:

Task Template

Template Name
Diabetes Results

Category*
Lab

Type
Lab Results

Description ☐ **[[Glucose, Fasting]][Hemoglobin A1c]** Reason
per Netcare, Dr

Note / Instructions

Progress Indicators

Assignee*
Assign to user

Last Update: Stephanie Gosche

☐ Apply as Active
☒ Apply as Completed
☐ Apply as Cancelled

Urgency Normal
Recurrence None

Save

Observation Details & Usage

Ordering Provider

Facility

Existing Template

Workflow Step

Observation Template
Diabetes Results

Edit Privilege
All Users

Use Privilege
All Users

Usage
General

Graph Template
Current Observation Set

Print Type
Default Task

Description is a multi-select macro: **[[Glucose, Fasting]][Hemoglobin A1c][Glucose, Fasting & Hemoglobin A1c]**

Lipid Screening

For the observations:

Observation Template

Name
Lipid Panel

Category
Lab

Copy

Description
Lipid Panel

Order Type
Response

Type

Step

Print Type
Select Print Type

Edit Privilege
All Users

Use Privilege
All Users

Recipient

Creator: Ravi, Senarath
Updated: 2021-05-07

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Cholesterol			1			14647	
HDL Cholesterol			1			14648	
LDL Cholesterol			2			39469	
Triglycerides	result, <20		010				

Save

Observation Type

Observation Name
Cholesterol

Code
14647-2

Data Type
Numeric

Managed List

Order
1

Increment

Units/Format

Display Range

Lower Range

Upper Range

Drilldown Template

Default Graph Template
Lipid Panel

Synonyms
cholesterol total, total cholesterol

Name Format (CSS)

7pt 9pt Bold, Red, White Background, Black Border Center Red, White Background, Black Border

Scalable-10 Scalable-12 Scalable-14 Scalable-8 Bold Italics Underline Red 12pt

10pt 8pt Courier Arial Bold, Red Bold, Red, 12pt Scalable-16

Value Format (CSS)

7pt 9pt Bold, Red, White Background, Black Border Center Red, White Background, Black Border

Scalable-10 Scalable-12 Scalable-14 Scalable-8 Bold Italics Underline Red 12pt

10pt 8pt Courier Arial Bold, Red Bold, Red, 12pt Scalable-16

Disable Comment

Validation

Mapped Display Field

Calculation

User Defined Calculation Expression

Hide Observation Label

Print Type

Allergy Classification

Parent Flag & ID

Enable add-on usage

Auto Invoke Drilldown

Don't Display Value in History

Allow Overflow

Use Privilege
Public

Edit Privilege
Public

Apply Save

Observation Type

Observation Name: HDL Cholesterol

Data Type: Numeric

Managed List: [v]

Order: 1

Increment: [v]

CDS Criteria: [v]

Instruction/Note: [v]

Question: [v]

Units/Format: [v]

Display Range: [v]

Lower Range: [v]

Upper Range: [v]

Drilldown Template: [v]

Default Graph Template: *Lipid Panel

System: [v]

Code: 14545-4

Synonyms: cholesterol in hdl, hdl, hdl - cholesterol

Name Format (CSS): [v] 7pt [v] 9pt [v] Bold, Red, White Background, Black Border [v] Center [v] Red, White Background, Black Border [v] Scalable-10 [v] Scalable-12 [v] Scalable-14 [v] Scalable-8 [v] Bold [v] Italic [v] Underline [v] Red [v] 12pt [v] 10pt [v] 8pt [v] Courier [v] Arial [v] Bold, Red [v] Bold, Red, 12pt [v] Scalable-16

Value Format (CSS): [v] 7pt [v] 9pt [v] Bold, Red, White Background, Black Border [v] Center [v] Red, White Background, Black Border [v] Scalable-10 [v] Scalable-12 [v] Scalable-14 [v] Scalable-8 [v] Bold [v] Italic [v] Underline [v] Red [v] 12pt [v] 10pt [v] 8pt [v] Courier [v] Arial [v] Bold, Red [v] Bold, Red, 12pt [v] Scalable-16

Disable Comment: [v]

Hide Observation Label: [v]

Enable add-on usage: [v]

Auto Invoke Drilldown: [v]

Don't Display Value in History: [v]

Allow Overflow: [v]

Validation: [v]

Print Type: [v]

Allergy Classification: [v]

Parent Flag & ID: [v]

Use Privilege: Public

Edit Privilege: Public

Mapped Display Field: [v]

Calculation: [v]

User Defined Calculation Expression: [v]

Apply Save

Observation Type

Observation Name: LDL Cholesterol

Data Type: Numeric

Managed List: [v]

Order: 2

Increment: [v]

CDS Criteria: [v]

Instruction/Note: [v]

Question: [v]

Units/Format: [v]

Display Range: [v]

Lower Range: [v]

Upper Range: [v]

Drilldown Template: [v]

Default Graph Template: *Lipid Panel

System: [v]

Code: 39469-2

Synonyms: cholesterol in ldl, ldl, ldl - cholesterol

Name Format (CSS): [v] 7pt [v] 9pt [v] Bold, Red, White Background, Black Border [v] Center [v] Red, White Background, Black Border [v] Scalable-10 [v] Scalable-12 [v] Scalable-14 [v] Scalable-8 [v] Bold [v] Italic [v] Underline [v] Red [v] 12pt [v] 10pt [v] 8pt [v] Courier [v] Arial [v] Bold, Red [v] Bold, Red, 12pt [v] Scalable-16

Value Format (CSS): [v] 7pt [v] 9pt [v] Bold, Red, White Background, Black Border [v] Center [v] Red, White Background, Black Border [v] Scalable-10 [v] Scalable-12 [v] Scalable-14 [v] Scalable-8 [v] Bold [v] Italic [v] Underline [v] Red [v] 12pt [v] 10pt [v] 8pt [v] Courier [v] Arial [v] Bold, Red [v] Bold, Red, 12pt [v] Scalable-16

Disable Comment: [v]

Hide Observation Label: [v]

Enable add-on usage: [v]

Auto Invoke Drilldown: [v]

Don't Display Value in History: [v]

Allow Overflow: [v]

Validation: [v]

Print Type: [v]

Allergy Classification: [v]

Parent Flag & ID: [v]

Use Privilege: Public

Edit Privilege: Public

Mapped Display Field: [v]

Calculation: [v]

User Defined Calculation Expression: [v]

Apply Save

Observation Type

Observation Name: Triglycerides

Data Type: Numeric

Managed List: Order: 40 Increment:

Units/Format: mmol/L Display Range: 0.00-1.70

System: Lower Range: Upper Range: Drilldown Template: Default Graph Template: *Lipid Panel

Name Format (CSS): ☐ Bold, Red, White Background, Black Border ☐ pymt reminder1 ☐ Red, White Background, Black Border ☐ Scalable-10 ☐ Scalable-12 ☐ Scalable-14 ☐ Scalable-8 ☐ Bold ☐ Italic ☐ Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Value Format (CSS): ☐ Bold, Red, White Background, Black Border ☐ pymt reminder1 ☐ Red, White Background, Black Border ☐ Scalable-10 ☐ Scalable-12 ☐ Scalable-14 ☐ Scalable-8 ☐ Bold ☐ Italic ☐ Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Disable Comment: ☐ Validation: Mapped Display Field: Calculation: User Defined Calculation Expression:

Hide Observation Label: ☐ Print Type: Allergy Classification: Parent Flag & ID: Use Privilege: Public Edit Privilege: Public

Enable add-on usage: ☐ Auto Invoke Drilldown: ☐ Don't Display Value in History: ☐ Allow Overflow: ☐

Apply Save

For the task template:

Task Template

Template Name: Lipid Results

Category*: Lab Type: Lab Results

Description: ☐ Lipid Panel Reason: as per Netcare, Dr

Note / Instructions:

Progress Indicators: ☐ ☐

Assignee*: Assign to user Start: when due Due*: Today

Last Update: Stephane Gosche

☐ Apply as Active ☒ Apply as Completed ☐ Apply as Cancelled

Urgency: Normal Recurrence: None

Save

Observation Details & Usage

Ordering Provider: Facility:

Billing Template: Workflow Step: Observation Template: Lipid Results

Edit Privilege: All Users Use Privilege: All Users Usage: General Graph Template: Current Observation Set Print Type: Default Task

Pap Test Results

For the observations:

You need to create a managed list: the list is called Pap Results

Pap Results Dropdown Management

[Return](#) [Help](#)

Table	Description	Code	Use Privilege	Edit Privilege
Pap Results Dropdown			Public	Public
Name	Code	Active	Sort	
NIL	2064393	<input checked="" type="checkbox"/>	10	
ASCUS	2064394	<input checked="" type="checkbox"/>	20	
ASC-H	2140112	<input checked="" type="checkbox"/>	30	
AGC	2132109	<input checked="" type="checkbox"/>	40	
HSIL	2064395	<input checked="" type="checkbox"/>	50	
LSIL	2064396	<input checked="" type="checkbox"/>	60	
AIS, SCC, Other Cancers	2140115	<input checked="" type="checkbox"/>	70	
Inadequate Sample	2140116	<input checked="" type="checkbox"/>	80	

For the observation template:

Observation Template

Name: Pap Results
 Category: Lab
 Description: Gynecological Cytology Results

Order Type: Response
 Type:
 Step:
 Print Type: Select Print Type

Use Privilege: All Users
 Edit Privilege: All Users

Recipient:
 Creator: Ravi Samanthla
 Updated: 2023-04-01

Observation Name: Gynecological Cytology
 Default Value:
 Comment:
 Sort: 0
 Max:
 Reuse:
 Code:
 ID:
 Save

Observation Type

Observation Name: Gynecological Cytology
 Data Type: Dropdown
 Managed List: Pap Results
 Order: 11511
 Increment:
 CDS Criteria:
 Instruction/Note:
 Question:
 Units/Format:
 Display Range:
 Lower Range:
 Upper Range:
 Drilldown Template:
 Default Graph Template:
 System:
 Code: 47527-7
 Name Format (CSS):
 Value Format (CSS):
 Disable Comment:
 Hide Observation Label:
 Enable add-on usage:
 Auto Invoke Drilldown:
 Don't Display Value in History:
 Allow Overflow:
 Validation:
 Mapped Display Field:
 Calculation:
 Parent Flag & ID:
 Use Privilege: Public
 Edit Privilege: Public
 User Defined Calculation Expression:
 Apply Save

For the task template:

Task Template

Template Name
Pap Results

Category*
Lab

Type

Description: ☐ Reason
Gynecological Cytology per netcare, Dr

Note / Instructions

Progress Indicators

Assignee*
Assign to user

Start
when due

Due*
Today

Last Update: Stephanie Goehle

☐ Apply as Active
☒ Apply as Completed
☐ Apply as Cancelled

Urgency Normal
Recurrence None

Save

Observation Details & Usage

Ordering Provider

Facility

Billing Template

Workflow Step

Observation Template
Gynecological Cytology Result

Edit Privilege
All Users

Use Privilege
All Users

Usage
General

Graph Template
Current Observation Set

Print Type
Default Task

Mammogram Results

For the observations:

You need to create 2 managed lists: the lists are called Mammo Results & Radiologist Suggested Follow Up

BIRADS Dropdown Management

Return

Help

Table

BIRADS Dropdown

Description

Code

Use Privilege

Public

Edit Privilege

Public

Name	Code	Active	Sort			
BIRADS 0	2064405	<input checked="" type="checkbox"/>	<div>0</div>			
BIRADS 1	2064406	<input checked="" type="checkbox"/>	<div>0</div>			
BIRADS 2	2064407	<input checked="" type="checkbox"/>	<div>0</div>			
BIRADS 3	2064408	<input checked="" type="checkbox"/>	<div>0</div>			
BIRADS 4	2064409	<input checked="" type="checkbox"/>	<div>0</div>			
BIRADS 5	2064410	<input checked="" type="checkbox"/>	<div>0</div>			
BIRADS 6	2064411	<input checked="" type="checkbox"/>	<div>0</div>			

Export options:

Excel

PDF

RTF

Radiologists Suggested Follow Up Dropdown Management

Return

Help

Table

Radiologists Suggested Follow Up Dropdown

Description

Code

Use Privilege

Public

Edit Privilege

Public

Name	Code	Active	Sort			
Immediate - More Investigations Required	2064397	<input checked="" type="checkbox"/>	<div>10</div>			
3 Months	2064398	<input checked="" type="checkbox"/>	<div>20</div>			
6 Months	2064399	<input checked="" type="checkbox"/>	<div>30</div>			
1 Year	2064400	<input checked="" type="checkbox"/>	<div>40</div>			
1-2 Years	2064401	<input checked="" type="checkbox"/>	<div>50</div>			
2 Years - Routine	2064402	<input checked="" type="checkbox"/>	<div>60</div>			
Discontinue Screening	2064403	<input checked="" type="checkbox"/>	<div>70</div>			
None	2064404	<input checked="" type="checkbox"/>	<div>80</div>			

Export options: Excel | PDF | RTF

For the observation template:

Template Management

Observation Name: Mammogram Results
Category: Investigation
Observation: Mammogram Results

Observation Name: Mammogram Results
Default Value: Mammogram Results

Save

Observation Type

Observation Name: Mammogram Results
Data Type: Dropdown
Managed List: Mammogram Results

Units/Format: Display Range: Lower Range: Upper Range: Drilldown Template: Default Graph Template: Synonyms:

Name Format (CSS):
☐ 7pt ☐ 9pt ☐ Bold, Red, White Background, Black Border ☐ Center ☐ Red, White Background, Black Border
☐ Scalable-10 ☐ Scalable-12 ☐ Scalable-14 ☐ Scalable-8 ☐ Bold ☐ Italic ☐ Underline ☐ Red ☐ 12pt
☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Value Format (CSS):
☐ 7pt ☐ 9pt ☐ Bold, Red, White Background, Black Border ☐ Center ☐ Red, White Background, Black Border
☐ Scalable-10 ☐ Scalable-12 ☐ Scalable-14 ☐ Scalable-8 ☐ Bold ☐ Italic ☐ Underline ☐ Red ☐ 12pt
☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Disable Comment: Validation: Mapped Display Field: Calculation: User Defined Calculation Expression:

Hide Observation Label: Print Type: Allergy Classification: Parent Flag & ID: Use Privilege: Public: Edit Privilege: Public:

Apply Save

Observation Name: Radiologist Suggested Follow Up
Data Type: Dropdown
Managed List: Radiologist Suggested For

Units/Format: Display Range: Lower Range: Upper Range: Drilldown Template: Default Graph Template: Synonyms:

Name Format (CSS):
☐ Black Line ☐ Bold, Red, White Background, Black Border ☐ Center ☐ Padding Bottom ☐ Padding Top
☐ Red, White Background, Black Border ☐ Right ☐ Scalable-10 ☐ Scalable-12 ☐ Scalable-14 ☐ Scalable-8 ☐ Bold ☐ Italic
☐ Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Value Format (CSS):
☐ Black Line ☐ Bold, Red, White Background, Black Border ☐ Center ☐ Padding Bottom ☐ Padding Top
☐ Red, White Background, Black Border ☐ Right ☐ Scalable-10 ☐ Scalable-12 ☐ Scalable-14 ☐ Scalable-8 ☐ Bold ☐ Italic
☐ Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Disable Comment: Validation: Mapped Display Field: Calculation: User Defined Calculation Expression:

Hide Observation Label: Print Type: Allergy Classification: Parent Flag & ID: Use Privilege: Public: Edit Privilege: Public:

Apply Save

For the task template:

Task Template

Template Name:

Category: Type:

Description: Reason:

Note/Instructions:

Progress Indicators: ☐ ☐ ☐

Assignee: Start: Due:

Last Updated: Stephanie Goetze

☐ Apply as Active ☒ Apply as Completed ☐ Apply as Cancelled

Agency: Recurrence:

Observation Details & Usage

Ordering Provider: Facility:

Billing Template:

Workflow Step:

Observation Template:

Edit Privilege:

Use Privilege:

Usage:

Graph Template:

Print Type:

Colonoscopy Results

*Some clinics that are all ready set up have this in the Consults category, others have it in Investigations. E-Delivery results will come in as either category. If the clinic has a colonoscopy goal, set it up as the matching category to the goal.

For the observations:

You need to create a managed list: the list is called Suggested Follow Up

For the Managed List:

Task	Description	Code	Use Privilege	Auto Privilege
Recommended Suggested Follow Up (upstream)				
1 Year		1870652	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 Years		1870654	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Years		1870655	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4 Years		1870656	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5 Years		1870657	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6 Years		1870658	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7 Years		1870659	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8 Years		1870660	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9 Years		1870661	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10 Years		1870662	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Discontinue Screening				
Return to FIT Screening				

For the observation template:

Observation Template

Name:

Category:

Code:

Description:

Order Type:

Type:

Workflow:

Print Type:

Edit Privilege:

Use Privilege:

Recurrence:

Observation Name	Default Value	Comment	Start	Rate	Days	Code	Grid
Colonoscopy Report							
Surgeon Completed							
Recommended Follow-up							
Additional Notes							

Observation Type

Observation Name: Colonoscopy Report

Data Type: Title

Managed List: [Empty]

Order: 0

Increment: [Empty]

Instruction/Note: [Empty]

Question: [Empty]

Units/Format: [Empty]

Display Range: [Empty]

Lower Range: [Empty]

Upper Range: [Empty]

Drilldown Template: [Empty]

Default Graph Template: [Empty]

System: [Empty]

Code: [Empty]

Synonyms: [Empty]

Name Format (CSS): [Empty]

Value Format (CSS): [Empty]

Disable Comment: [Empty]

Validation: [Empty]

Enable add-on usage: [Empty]

Auto Invoke Drilldown: [Empty]

Don't Display Value in History: [Empty]

Allow Overflow: [Empty]

Mapped Display Field: [Empty]

Calculation: [Empty]

Print Type: [Empty]

Hide Observation Label: [Empty]

Use Privilege: Public

Edit Privilege: Public

User Defined Calculation Expression: [Empty]

Apply Save

Observation Type

Observation Name: Surgeon Completed Work Privileges

Data Type: Provider

Managed List: [Empty]

Order: 1

Increment: [Empty]

Instruction/Note: [Empty]

Question: [Empty]

Units/Format: [Empty]

Display Range: [Empty]

Lower Range: [Empty]

Upper Range: [Empty]

Drilldown Template: [Empty]

Default Graph Template: [Empty]

System: [Empty]

Code: [Empty]

Synonyms: [Empty]

Name Format (CSS): [Empty]

Value Format (CSS): [Empty]

Disable Comment: [Empty]

Validation: [Empty]

Enable add-on usage: [Empty]

Auto Invoke Drilldown: [Empty]

Don't Display Value in History: [Empty]

Allow Overflow: [Empty]

Mapped Display Field: [Empty]

Calculation: [Empty]

Print Type: [Empty]

Hide Observation Label: [Empty]

Use Privilege: Public

Edit Privilege: Public

User Defined Calculation Expression: [Empty]

Apply Save

Observation Type

Observation Name: Recommended Follow up

Data Type: Drilldown

Managed List: Follow up: Colonoscopy

Order: 5

Increment: [Empty]

Instruction/Note: [Empty]

Question: [Empty]

Units/Format: [Empty]

Display Range: [Empty]

Lower Range: [Empty]

Upper Range: [Empty]

Drilldown Template: [Empty]

Default Graph Template: [Empty]

System: [Empty]

Code: [Empty]

Synonyms: [Empty]

Name Format (CSS): [Empty]

Value Format (CSS): [Empty]

Disable Comment: [Empty]

Validation: [Empty]

Enable add-on usage: [Empty]

Auto Invoke Drilldown: [Empty]

Don't Display Value in History: [Empty]

Allow Overflow: [Empty]

Mapped Display Field: [Empty]

Calculation: [Empty]

Print Type: [Empty]

Hide Observation Label: [Empty]

Use Privilege: Public

Edit Privilege: Public

User Defined Calculation Expression: [Empty]

Apply Save

Observation Type

For the task template:

Task Template

Template Name
Colonoscopy Results

Category* Consult Type

Description Reason
Colonoscopy as per Netcare, Dr.

Note / Instructions

Progress Indicators

Assignee* Assign to user Start when due Due* Today

Last Update: Stephanie Goetze

☐ Apply as Active
☒ Apply as Completed
☐ Apply as Cancelled

Urgency Normal
Recurrence None

Save

Observation Details & Usage

Ordering Provider Service Provider

Billing Template
Workflow Step

Observation Template
Edit Privilege All Users
Use Privilege All Users
Usage General
Graph Template Current Observation Set
Print Type Default Task

Sigmoidoscopy Results

You will need to create a managed list called Sigmoidoscopy Follow Up

For the Managed List:

Name	Code	Active	Sort
1 Year	190503		3
2 Years	190504		3
3 Years	190505		3
4 Years	190506		3
5 Years	190507		3
None	190508		3
Other	190509		3

For the observation template:

Observation Template

Name Sigmoidoscopy Result
Category Consult
Description Sigmoidoscopy Result

Order Type Response
Type
Benchmark
Print Type Select Print Type

Bill Privilege All Health Staff
Use Privilege All Health Staff
Rep

Created: 2022-04-01

Observation Name Default View

Sigmoidoscopy Report
Sigmoidoscopy Completed
Recommended Follow up
Additional Notes

Comment

Sort
1
2
3
4

Unit
1
2
3
4

Code
1
2
3
4

Display Range
Lower Range
Upper Range
Dropdown Template

System

Name Format (CSS)
☐ Black Line ☐ Bold, Red, White Background, Black Border ☐ Center ☐ Padding Bottom ☐ Padding Top
☐ Red, White Background, Black Border ☐ Right ☐ Scalable-10 ☐ Scalable-12 ☐ Scalable-14 ☐ Scalable-8 ☐ Bold ☐ Italic
☐ Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Disable Comment
Validation
Mapped Display Field
Calculation
User Defined Calculation Expression

Hide Observation Label
Print Type
Allergy Classification
Parent Flag & ID

Enable add-on usage
Auto Invoke Dropdown
Don't Display Value in History
Allow Overflow

Managed List
Question
Default Graph Template
Synonyms

Order ID
Increment

Use Privilege Public
Edit Privilege Public

Apply Save

Observation Type

Observation Name: **Surgeon Completed**

Date Type: **Provider**

Managed List: **Order**

Order: **1**

Increment: **1**

Units/Format: **Display Range**

System: **Lower Range**

Code: **Upper Range**

Drilldown Template: **Default Graph Template**

Question: **Synopsis**

Name Format (CSS): **Black Line** **Bold** **Red** **White Background** **Black Border** **Center** **Padding Bottom** **Padding Top**

Value Format (CSS): **Black Line** **Bold** **Red** **White Background** **Black Border** **Center** **Padding Bottom** **Padding Top**

Disable Comment: **Validation**

Maped Display Field: **Calculation**

User Defined Calculation Expression: **Apply** **Save**

Observation Type

Observation Name: **Recommended Follow up**

Date Type: **Dropdown**

Managed List: **Significantly Follow Up**

Order: **5**

Increment: **1**

Units/Format: **Display Range**

System: **Lower Range**

Code: **Upper Range**

Drilldown Template: **Default Graph Template**

Question: **Synopsis**

Name Format (CSS): **Black Line** **Bold** **Red** **White Background** **Black Border** **Center** **Padding Bottom** **Padding Top**

Value Format (CSS): **Black Line** **Bold** **Red** **White Background** **Black Border** **Center** **Padding Bottom** **Padding Top**

Disable Comment: **Validation**

Maped Display Field: **Calculation**

User Defined Calculation Expression: **Apply** **Save**

Observation Type

Observation Name: **Additional Notes**

Date Type: **Text Box**

Managed List: **Order**

Order: **10**

Increment: **1**

Units/Format: **Display Range**

System: **Lower Range**

Code: **Upper Range**

Drilldown Template: **Default Graph Template**

Question: **Synopsis**

Name Format (CSS): **Black Line** **Bold** **Red** **White Background** **Black Border** **Center** **Padding Bottom** **Padding Top**

Value Format (CSS): **Black Line** **Bold** **Red** **White Background** **Black Border** **Center** **Padding Bottom** **Padding Top**

Disable Comment: **Validation**

Maped Display Field: **Calculation**

User Defined Calculation Expression: **Apply** **Save**

For the task template:

Task Template		Observation Details & Usage	
Template Name: <input type="text" value="Sigmoidoscopy Results"/>		Ordering Provider: <input type="text"/>	
Category: <input type="text" value="Consult"/> Type: <input type="text"/>		Service Provider: <input type="text"/>	
Description: <input type="text" value="Sigmoidoscopy"/> Reason: <input type="text"/>		Billing Template: <input type="text"/>	
Note / Instructions: <input type="text"/>		Workflow Step: <input type="text"/>	
Progress Indicators: <input type="checkbox"/> <input type="checkbox"/>		Observation Template: <input type="text"/>	
Assignee: <input type="text"/> Start: <input type="text" value="when due"/> Due: <input type="text" value="Today"/>		Edit Privilege: <input type="text" value="All Users"/>	
Last Update: <input type="text" value="Stephane Gossie"/>		Use Privilege: <input type="text" value="All Users"/>	
<input type="radio"/> Apply as Active		Usage: <input type="text" value="General"/>	
<input checked="" type="radio"/> Apply as Completed		Graph Template: <input type="text" value="Current Observation Set"/>	
<input type="radio"/> Apply as Cancelled		Print Type: <input type="text" value="Default Task"/>	
<input type="button" value="Save"/>			

Reports Dashboard

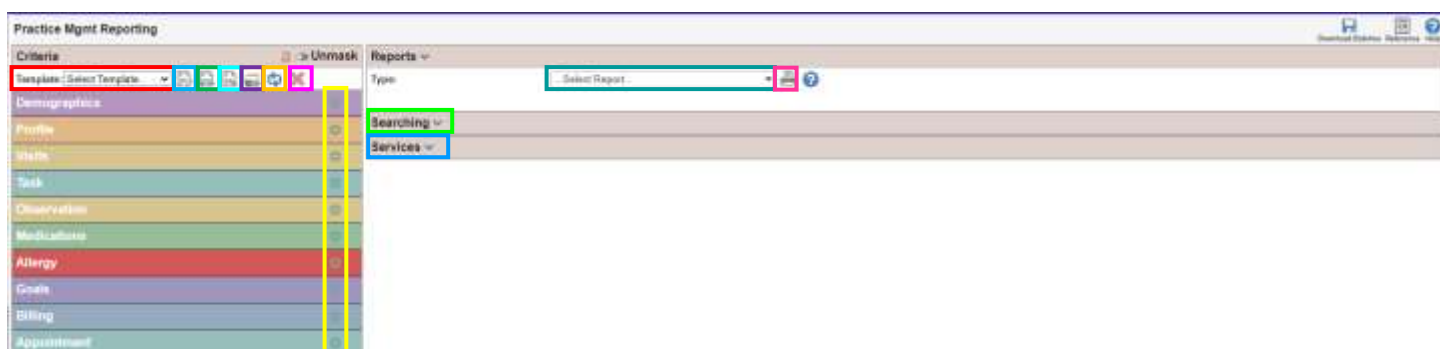
To build queries go into the reports menu.



For most of the quarterly reports we build an eligible and a due query. There is no “or” option when searching different areas of the chart so we do not create screened reports for most quarterly items. The Q2/Q4 vulnerable population queries are the only ones that are built as screened instead of due.

If the PCCA is only working with one doctor, pick them as the primary provider in all the queries. If they are working with multiple doctors, set up a clinic group (you need Admin permissions) for the QI Physicians or use an existing group in the EMR. Instructions to follow.

The reports screen looks like this when you open it.



1. **Template dropdown:** select from a list of saved or system templates.
2. **Edit Template:** Edit current template criteria.
3. **Create a New Template From Existing:** Create a new saved template based on a selected template or using what you have selected in the categories below this field.
4. **Create New Template:** Create a new template
5. **Manage Templates:** set or remove your favorites, delete templates.
6. **Refresh:** if you have a template open this will change it back to the default settings.
7. **Close All Criteria:** remove all open criteria. Close all selections and start over.
8. **+** open the category to apply items to your criteria.
9. **Select Report:** change the type of information you would like to see once the patient list is generated. Panel reports for quarterly should be set as “Age Histogram - 10 Year Groups”. The rest of the quarterly reports should be Patient Count (PDF). Outreach reports should be “Patient List”.
10. **Print Button** – generates a PDF for Age Histogram & Patient Count. Patient List will create an excel document.
11. **Searching:** click blue arrow to expand so you view a list of patients generated by the query.
12. **Services:** apply batch changes to the selected patients. Either by check marks or if all patients are selected then it will apply to all patients on that page of the report.

Creating Queries

From the reporting menu select Create New Template (cyan in the above screenshot). A new window will open, at the top of the window the following selections are available.

Template Name: []

Copy Template: []

Topic: []

Report: []

Secondary Template: []

Trigger: []

Service: []

Task: []

Profile: []

Care Plan: []

Edit Privilege: []

User Privilege: []

Date criteria type: []

Append additional criteria: []

Practice Model: []

Select Template: []

All Users: []

Relative: []

-- Add -- []

Template Name: as per our query naming guidelines.

Report: Panel reports for quarterly should be set as "Age Histogram - 10 Year Groups". The rest of the quarterly reports should be Patient Count (PDF). Outreach reports should be "Patient List".

Date Criteria Type: Use relative. It means the dates flex to remain current. Example: 1 Year back, the dates will update daily. Absolute is the other option, use for fixed date ranges. They do not update.

Below these fields you will see the expanded versions of the categories available for queries.

Demographics

Gender: [] Starts: []

Age: [] Starts: []

Address: [] Starts: []

Admin

Category: [] Starts: []

Type: [] Starts: []

Status: [] Starts: []

Users

Name: [] Starts: []

Date: [] Starts: []

Group: [] Starts: []

Add: []

Tip: Demographics criteria cannot be excluded, nor can you add more than 1 demographics search box

+: add an additional box to search this section of the EMR. ****Can only use "and" or "and not".**

X: Close this section.

Not: Exclude this

Order Type: to search for results = results. For requisitions/referral = requests.

The image displays six screenshots of filter panels from a software application, each with a title bar and a 'not' checkbox. The panels are arranged vertically. To the right of the screenshots are three vertical colored rectangles: pink, cyan, and purple.

- Filter:** Contains dropdowns for Category, Type, Observation Group, Observation Type, Observation Status, Observation Template, Order Type, Order Status, Order Provider, Order Provider Role, Order Provider ID, Service Provider, Patient Class, Patient Location, Task Date, Not Entered When, Date, Cancel Reason, On Hold?, Observation ID, and Count.
- Observation:** Contains dropdowns for Category, Observation Group, Observation Type, Observation Status, Observation Template, Order Type, Order Status, Order Provider, Order Provider Role, Order Provider ID, Service Provider, Patient Class, Patient Location, Task Date, Not Entered When, Date, Cancel Reason, On Hold?, Observation ID, and Count.
- Medication:** Contains dropdowns for Drug Name, ATC Class, Average Daily Dose, Active Status, Drug Use, Start Date, End Date, Indication, Provider, Signing Status, Prescribed Status, and Count.
- Allergy:** Contains dropdowns for Allergen, Status, Reaction, Severity, and Count.
- Death:** Contains dropdowns for Name, Cause of Death, Date of Death, Out of Range?, Status, Individualized?, Reason, Cancel Reason, and Count.
- Billing:** Contains dropdowns for Billing Date, Diagnosis, Status, Group, Attending Provider, Location, Third Party, Patient Name, Any Date, Service Date, Match #, Class Type, Priority, Has Warning?, Warning Off, Explanation Code, and Count.
- Appointment:** Contains dropdowns for Type, Concern, Time Type, Appointment Location, Rescheduled By, Status, Group, Provider or Resource, Resource, Equipment, Room, Bill Status, Appointment Time, Priority, and Count.

When you build your queries:

1. Add the title using our standard query name list.
2. Select report type, Panel reports for quarterly should be set as "Age Histogram - 10 Year Groups". The rest of the quarterly reports should be Patient Count (PDF). Outreach reports should be "Patient List".
3. Add the appropriate selections from the screenshots below into each category. Remember to check off the "not" box when appropriate.

The fastest way to make queries is to create your eligible queries, copy and edit them to create your due or numerator queries. Then copy and edit the due or numerator queries to create the outreach queries.

Quarterly Reporting Queries

A) ESPCN – Quarterly – Panel Full (1 per doctor)

Demographics		✖
Status	Active	
Primary Provider	Mah, Stanley	
Profile		
Visits		
Task		
Observation		
Medications		
Allergy		
Goals		
Billing		
Appointment		

B) ESPCN – Quarterly – Eligible 18+ (Vitals & Lifestyle)

Demographics		✖
Status	Active	
Provider In Group	Physicians	
Primary Provider	All	
Age Range	18 to 200	
Profile		
Visits		
Task		
Observation		
Medications		
Allergy		
Goals		
Billing		
Appointment		

C) ESPCN – Quarterly – BP Due

Demographics

Status

Active

▼

Provider In Group

Physicians

▼

Primary Provider

All

▼

Age Range

18

to

130

Profile

Visits

Task

Observation

not

Observation

(☐ last)

Conta

▼

BP diastolic

>

▼

1

as

Number

▼

or (☐ last)

Conta

▼

BP systolic

>

▼

1

as

Number

▼

Date

10-Mar-2021

to

11-Mar-2022

Medications

Allergy

Goals

Billing

Appointment

D) ESPCN – Quarterly – Height & Weight Due

Demographics

Status

Active

Provider In Group

Physicians

Primary Provider

All

Age Range

18

to

110

Profile

Visits

Task

Observation

Observation

() last

Conta

Height

>

(1

as

Number

Date

30-Apr-2003

to

16-Nov-2023

Observation

Observation

() last

Conta

Weight

>

(1

as

Number

Date

15-Nov-2020

to

16-Nov-2023

Medications

Allergy

Goals

Billing

Appointment

E) ESPCN – Quarterly – Exercise Assessment Due

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	18 to

Profile
Visits
Task

Observation
Observation
<input type="checkbox"/> last) Exact physical activity
Date 08-Oct-2023 to 08-Oct-2024

Medications
Allergy
Goals
Billing
Appointment

F) ESPCN – Quarterly – Tobacco Assessment Due

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	18 to

Profile
Visits
Task

Observation
Observation
<input type="checkbox"/> last) Exact Smoking Status
Date 08-Oct-2023 to 08-Oct-2024

Medications
Allergy
Goals
Billing
Appointment

G) ESPCN – Quarterly – Pap Eligible

Demographics			
Sex	Female		
Status	Active		
Provider In Group	Physicians		
Primary Provider	All		
Age Range	25	to	69

Profile			
Category	Surgical Hx		
or	Medical		
Description	TAH	Conta	
or	Total Hysterectomy	Conta	
or	Total Vaginal Hysterecto	Conta	
or	Total Abdominal Hyster	Conta	
or	Complete Hysterectomy	Conta	

Visits
Task
Observation
Medications
Allergy
Goals
Billing
Appointment

H) ESPCN – Quarterly – Pap Due

Demographics	
Sex	Female
Status +	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	25 to 69
Profile	
Category +	Surgical Hx
or	Medical
Description +	TAH
or	Total Hysterectomy
or	Total Abdominal Hysterectomy
or	Total Vaginal Hysterectomy
or	Complete Hysterectomy
Visits	
Task	
Category +	Lab
Description +	DKML Cytology Gynecology
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
Order Type	Result
Task Date	16-Nov-2020 to 29-Sep-2023
Obs. Date	16-Nov-2020 to 16-Nov-2023
Observation	
Order Type	Result
Observation +	Pap Smear
or (last)	Gynecological cytology (19766-5)
Date	16-Nov-2020 to 16-Nov-2023
Medications	
Allergy	
Goals	
Billing	
Appointment	

DKML Cytology Gynecological (contains)
 Gynecological Cytology (exact)
 Gynecological Cytology (starts with)
 , Gynecological Cytology (contains)
 , Gynecological Cytology, (contains)

I) ESPCN – Quarterly – Mammo Eligible

Demographics	
Gender	Female
Status +	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	45 to 74
Profile	
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	

J) ESPCN – Quarterly – Mammo Due

Demographics		✖	
Gender	Female	▼	
Status +	Active	▼	
Provider In Group	Physicians	▼	
Primary Provider	All	▼	
Age Range	45	to	74
Profile +			
Visits +			
Task + ✖ ✓ not			
Category +	Investigation	▼	
Type +	Mammogram	▼ ✖	
	or MAMMOGRAPHY	▼ ✖	
Order Type	Result	▼	
Task Date	Back 2 years	Ahead	None
Obs. Date	07-Jul-2021	to	07-Jul-2023
Task + ✖ ✓ not			
Description +	Mammo	Cont:	▼
Order Type	Result	▼	
Task Date	Back 2 years	Ahead	None
Obs. Date	07-Jul-2021	to	07-Jul-2023
Observation +			
Medications +			
Allergy +			
Goals +			
Billing +			
Appointment +			

K) ESPCN – Quarterly – CRC Eligible

Criteria		Unmask
Template: ESPCN - Eligible for		
Demographics		
Status	Active	
Provider In Group	Physicians	
Primary Provider	All	
Age Range	50 to 74	
Profile		
Visits		
Task		
Observation		
Medications		
Allergy		
Goals		
Billing		
Appointment		

L) ESPCN – Quarterly – CRC Due

Demographics			
Status +	Active		
Provider In Group	Physicians		
Primary Provider	All		
Age Range	50 to 74		
Profile			
Visits			
Task			
Category +	Consult		
or	Investigation		
Description +	Colonoscopy	Cont:	
Order Type	Result		
Task Date	08-Jul-2013 to 07-Jul-2023		
Obs. Date	07-Jul-2013 to 07-Jul-2023		
Task			
Category +	Investigation		
Type +	Colonoscopy		
Order Type	Result		
Task Date	07-Jul-2013 to 07-Jul-2023		
Obs. Date	07-Jul-2013 to 07-Jul-2023		
Task			
Category +	Lab		
Description +	Fecal Immunochemical	Cont:	
or	FIT	Cont:	
Order Type	Result		
Task Date	2 years	None	
Obs. Date	07-Jul-2021 to 07-Jul-2023		
Task			
Category +	Consult		
or	Investigation		
Description +	Sigmoidoscopy	Cont:	
Order Type	Result		
Task Date	5 years	None	
Obs. Date	07-Jul-2018 to 07-Jul-2023		
Observation			
Order Type	Result		
Observation +			
() last	Exac	Fecal Immunochemical	
or () last	Exac	Fecal Immunochemical	
Date	07-Jul-2021 to 07-Jul-2023		
Medications			
Allergy			
Goals			
Billing			
Appointment			

M) ESPCN – Quarterly – Lipids Eligible

Demographics		✕	
Status	Active	▼	
Provider In Group	Physicians	▼	
Primary Provider	All	▼	
Age Range	40	to	74
Profile			
Visits			
Task			
Observation			
Medications ✕ not			
ATC Class	HMG COA REDUCTAS	C10AA	
Active Status	Active Only	▼	
Start Date	16-Nov-1905		to 16-Nov-2023
Allergy			
Goals			
Billing			
Appointment			

N) ESPCN – Quarterly – Lipids Due

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	40 to 74
Profile	
Visits	
Task	
Category	Lab
Description	Lipid Panel
Order Type	Result
Task Date	Back 5 years to Ahead All
Obs. Date	16-Nov-2018 to 16-Nov-2023
Observation	
Order Type	Result
Observation	
(last) Exact	Cholesterol, Total 14647-2
or (last) Exact	HDL Cholesterol 14646-4
or (last) Exact	LDL Cholesterol
Date	16-Nov-2018 to 16-Nov-2023
Medications	
ATC Class	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	16-Nov-1941 to 16-Nov-2023
Allergy	
Goals	
Billing	
Appointment	

Lipid (contains)
Cardiovascular Disease Risk Assessment (contains)

O) ESPCN – Quarterly – Diabetes Eligible

Criteria		Unmask
Template: ESPCN - Eligible fo		
Demographics		
Status	Active	
Provider In Group	Physicians	
Primary Provider	All	
Age Range	40	to 130
Profile		
Visits		
Task		
Observation		
Medications		
Allergy		
Goals		
Billing		
Appointment		

P) ESPCN – Quarterly – Diabetes Due

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	40 to
Profile	
Visits	
Task	
Category	Lab
Description	Glucose, Fasting
Order Type	Result
Task Date	Back 5 years Ahead All
Obs. Date	to 16-Nov-2023
Observation	
Order Type	Result
Observation	(last) Cont: Glucose, fasting
or (last)	Cont: Hemoglobin A1C
Date	16-Nov-2018 to 16-Nov-2023
Medications	
Allergy	
Goals	
Billing	
Appointment	

Q) ESPCN – Quarterly – CV Risk Eligible

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	40 to 74
Profile	
Visits	
Task	
Observation	
Medications	
ATC Class	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	07-Jul-1900 to 07-Jul-2023
Allergy	
Goals	
Billing	
Appointment	

R) ESPCN – Quarterly – CV Risk Due

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	40 to 74
Profile	
Visits	
Task	
Category	Attachment
Type	Framingham
Task Date	Start 5 years End None
Obs. Date	17-Nov-2018 to 16-Nov-2023
Observations	
Category	All
Observation	<input type="radio"/> Exact Framingham CVD 10-yr <input type="radio"/> Cont'd cvr <input type="radio"/> Cont'd cv risk <input type="radio"/> Cont'd framingham <input type="radio"/> Cont'd ffs <input type="radio"/> Cont'd cardiovascular risk <input type="radio"/> Exact 10-Year Cardiovascular 65853-4 Date 16-Nov-2018 to 16-Nov-2023
Medications	
ATC Class	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	04-Dec-1942 to 16-Nov-2023
Allergy	
Goals	
Billing	
Appointment	

10-Year Cardiovascular Disease Risk	65853-4	>= 1
-------------------------------------	---------	------

S) ESPCN – Quarterly – VR - # of Appointments in 3 Years

Demographics		
Status +	Active	▼
Provider In Group	Physicians	▼
Primary Provider	All	▼
Profile +		
Visits +		
Task +		
Observation +		
Medications +		
Allergy +		
Goals +		
Billing +		
Appointment + ✖ not		
Type +	All	▼
Status +	Exclude Cancellatio	▼
Date	15-Nov-2020	to 16-Nov-2023

T) ESPCN – Quarterly – VR - # of Patients Verified in 3 Years

Demographics		
Status +	Active	▼
Provider In Group	Physicians	▼
Primary Provider	All	▼
Validated Since	15-Nov-2020	
Profile +		
Visits +		
Task +		
Observation +		
Medications +		
Allergy +		
Goals +		
Billing +		
Appointment + ✖ not		
Type +	All	▼
Status +	Exclude Cancellatio	▼
Date	16-Nov-2020	to 16-Nov-2023

U) ESPCN – Quarterly – VR - # of Appointments in 6 Months

Demographics		✖
Status +	Active	▼
Provider In Group	Physicians	▼
Primary Provider	All	▼
Profile		+
Visits		+
Task		+
Observation		+
Medications		+
Allergy		+
Goals		+
Billing		+
Appointment		+ ✖ <input type="checkbox"/> not
Type +	All	▼
Status +	Exclude Cancellati	▼
Date	↓ 14-May-2023	to 16-Nov-2023

V) ESPCN – Quarterly – VR - # of Patients Verified in 6 Months

Demographics		✖
Status +	Active	▼
Provider In Group	Physicians	▼
Primary Provider	All	▼
Validated Since	16-May-2023	📅
Profile		+
Visits		+
Task		+
Observation		+
Medications		+
Allergy		+
Goals		+
Billing		+
Appointment		+ ✖ <input type="checkbox"/> not
Type +	All	▼
Status +	Exclude Cancellati	▼
Date	↓ 14-May-2023	to 16-Nov-2023

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

Demographics		✖
Status +	Active	▼
Primary Provider	Mah, Stanley	▼
Profile		+
Visits		+
Task		+
Observation		+
Medications		+
Allergy		+
Goals		+
Billing		+
Appointment		+

** Use clinic's specific active panel criteria, create one report per doctor.

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

Demographics		✖
Status +	Active	▼
Primary Provider	Mah, Stanley	▼
Profile		+
Visits		+
Task		+
Observation		+
Medications		+
Allergy		+
Goals		+
Billing		+
Appointment		⊕ ✖ □ not
Status +	Exclude Cancellati	▼
Provider or Resource	Mah, Stanley	▼
Date	Back 3 years	▼ Ahead None ▼

** Use clinic's specific active panel criteria, create one report per doctor.

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

Demographics	
Status +	Active
Primary Provider	Mah, Stanley
Age Range	75 to
Profile	
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	

** Use clinic's specific active panel criteria, create one report per doctor.

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

Demographics	
Status +	Active
Primary Provider	Mah, Stanley
Age Range	75 to
Profile	
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status +	Exclude Cancellati
Provider or Resource	Mah, Stanley
Date	Back 1 year Ahead None

** Use clinic's specific active panel criteria, create one report per doctor.

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

Demographics

Status

Active

Primary Provider

Mah, Stanley

Profile

+

Visits

+

Task

+

Observation

+

Medications

+

Allergy

+

Goals

+

Billing

+

✖

☐ not

Diagnosis

250

Cont:

✖

or

401

Cont:

✖

or

410

Cont:

✖

or

411

Cont:

✖

or

412

Cont:

✖

or

413

Cont:

✖

or

414

Cont:

✖

or

420

Cont:

✖

or

421

Cont:

✖

or

422

Cont:

✖

or

423

Cont:

✖

or

424

Cont:

✖

or

425

Cont:

✖

or

426

Cont:

✖

or

427

Cont:

✖

or

428

Cont:

✖

or

429

Cont:

✖

or

440

Cont:

✖

or

441

Cont:

✖

or

491

Cont:

✖

or

492

Cont:

✖

or

496

Cont:

✖

or

585

Cont:

✖

or

586

Cont:

✖

Bill Date

Block

All

Amount

Appointment

+

**** Use clinic's specific active panel criteria, create one report per doctor.**

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

Demographics ✖			
Status +	Active	▼	
Primary Provider	Mah, Stanley	▼	
Profile +			
Visits +			
Task +			
Observation +			
Medications +			
Allergy +			
Goals +			
Billing + ✖ not			
Diagnosis +	Diabetes Mellitus	250	Cont: ▼ ✖
	or Essential Hypertension	401	Cont: ▼ ✖
	or Acute Myocardial Infarct	410	Cont: ▼ ✖
	or Other Acute And Subac	411	Cont: ▼ ✖
	or Old Myocardial Infarctio	412	Cont: ▼ ✖
	or Angina Pectoris	413	Cont: ▼ ✖
	or Other Forms Of Chronic	414	Cont: ▼ ✖
	or Acute Pericarditis	420	Cont: ▼ ✖
	or Acute And Subacute En	421	Cont: ▼ ✖
	or Acute Myocarditis	422	Cont: ▼ ✖
	or Other Diseases Of Peric	423	Cont: ▼ ✖
	or Other Diseases Of Endo	424	Cont: ▼ ✖
	or Cardiomyopathy	425	Cont: ▼ ✖
	or Conduction Disorders	426	Cont: ▼ ✖
	or Cardiac Dysrhythmias	427	Cont: ▼ ✖
	or Heart Failure	428	Cont: ▼ ✖
	or Ill-defined Descriptions	429	Cont: ▼ ✖
	or Atherosclerosis	440	Cont: ▼ ✖
	or Aortic Aneurysm	441	Cont: ▼ ✖
	or Chronic Bronchitis	491	Cont: ▼ ✖
or Emphysema	492	Cont: ▼ ✖	
or Chronic Airways Obstru	496	Cont: ▼ ✖	
or Chronic Renal Failure	585	Cont: ▼ ✖	
or Renal Failure, Unspecif	586	Cont: ▼ ✖	
Bill Date ▼	Back 30	All ▼	Ahead All ▼
Appointment + ✖ not			
Status +	Exclude Cancellati	▼	
Provider or Resource	Mah, Stanley	▼	
Date	Back 30	1 year ▼	Ahead None ▼

** Use clinic's specific active panel criteria, create one report per doctor.

DD) **ESPCN – Quarterly QI – Patients with DM (Denominator)**

Demographics	
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	18 to
Profile	
Visits	
Task	
Observation	
Category	Lab
Order Type	Result
Observation	
() last	Cont: Hemoglobin A1c 4548-4 >= 6.5 as Number
or () last	Cont: Glucose Fasting 14771-0 >= 7 as Number
or () last	Cont: Glucose, fasting >= 7 as Number
Date	19-Jun-2001 to 19-Jun-2025
Medications	
Allergy	
Goals	
Billing	
Diagnosis	Diabetes Mellitus 250 Start:
Bill Date	Back All Ahead None
Appointment	

EE) **ESPCN - Quarterly - Patients with DM with A1c in last 6 months**

Demographics	
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	18 to
Profile	
Visits	
Task	
Observation	
Category	Lab
Order Type	Result
Observation	
() last	Exact: Hemoglobin A1c 4548-4 >= 6.5 as Number
or () last	Exact: Glucose Fasting 14771-0 >= 7 as Number
or () last	Exact: Glucose, fasting >= 7 as Number
Date	19-Jun-2001 to 19-Jun-2025
Observation	
Category	Lab
Order Type	Result
Observation	
() last	Exact: Hemoglobin A1c 4548-4
Date	17-Dec-2024 to 19-Jun-2025
Medications	
Allergy	
Goals	
Billing	
Diagnosis	Diabetes Mellitus 250 Start:
Bill Date	Back All Ahead None
Appointment	

FF) **ESPCN - Quarterly QI - Patients with DM, DFE in last1 year**

Demographics			
Status	Active		
Primary Provider	Ahmed, Ghalib		
Age Range	18	to	
Profile			
Visits			
Task			
Description	dfe	Contz	✖
	or dfa	Contz	✖
	or diabetic foot	Contz	✖
	or diabetes foot	Contz	✖
	or foot exam	Contz	✖
	or foot screen	Contz	✖
	or foot assessment	Contz	✖
	Task Date	Back 1 year Ahead None	
Obs. Date	19-Jun-2024 to 19-Jun-2025		
Observation			
Category	Lab		
Order Type	Result		
Observation			
(last) Exac	Hemoglobin A1c	4548-4	>= 6.5 as Number
or (last) Exac	Glucose Fasting	14771-0	>= 7 as Number
or (last) Contz	Glucose, fasting		>= 7 as Number
Date	19-Jun-2001 to 19-Jun-2025		
Medications			
Allergy			
Goals			
Billing			
Diagnosis	Diabetes Mellitus	250	Starts
Bill Date	All	None	
Appointment			

GG) ESPCN - Quarterly QI - Patients with DM, A1c result, uncontrolled- 1year (Numerator)

Demographics	
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	18 to
Profile	
Visits	
Task	
Observation not	
Category	Lab
Order Type	Result
Observation	
<input type="checkbox"/> (last) Cont:	Hemoglobin A1c 4548-4 6.5 as Number
or <input type="checkbox"/> (last) Cont:	Glucose Fasting 14771-0 7 as Number
or <input type="checkbox"/> (last) Cont:	Glucose, fasting 7 as Number
Date	20-Jun-2001 to 20-Jun-2025
Observation not	
Category	Lab
Order Type	Result
Observation	
<input type="checkbox"/> (last) Cont:	A1c 8.5 as Number
Date	19-Jun-2024
Medications	
Allergy	
Goals	
Billing not	
Diagnosis	Diabetes Mellitus 250 Start:
Bill Date	Back All Ahead None
Appointment	

HH) ESPCN - Quarterly QI - Patients with DM, A1c result in 1 year (Denominator)

Demographics	
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	18 to
Profile	
Visits	
Task	
Observation	
Category	Lab
Order Type	Result
Observation	
(last) Cont:	Hemoglobin A1c 4548-4 >= 6.5 as Number
or (last) Cont:	Glucose Fasting 14771-0 >= 7 as Number
or (last) Cont:	Glucose, fasting >= 7 as Number
Date	20-Jun-2001 to 20-Jun-2025
Observation	
Category	Lab
Order Type	Result
Observation	
(last) Cont:	A1c
Date	20-Jun-2024
Medications	
Allergy	
Goals	
Billing	
Diagnosis	Diabetes Mellitus 250 Starts
Bill Date	Back All Ahead None
Appointment	

II) ESPCN - Quarterly QI – Pts with HTN, BP measured , elevated-1y (Numerator)

Demographics	
Status	Active
Primary Provider	Unassigned
Rostered	Yes
Rostered Provider	
Age Range	18 to
Profile	
Visits	
Task	
Observation	
Category	Visit
Observation	
(last) Exact	BP systolic >= 130 as Number
or (last) Exact	BP diastolic >= 80 as Number
Date	28-May-1909 to 13-Jun-2025
Observation	
Category	Visit
Observation	
(last) Exact	BP systolic >= 130 as Number
Date	13-Jun-2024
Medications	
Allergy	
Goals	
Billing	
Diagnosis	essential hypertension 401 Starts
Bill Date	Back All Ahead None
Appointment	

JJ) **ESPCN - Quarterly QI – Pts with HTN, BP measured 1 y (Denominator)**

Demographics	
Status	Active
Primary Provider	Unassigned
Rostered	Yes
Rostered Provider	
Age Range	18 to
Profile	
Visits	
Task	
Observation	
Category	Visit
Observation	
<input type="checkbox"/> (fast) Exact	BP systolic
or <input type="checkbox"/> (fast) Exact	BP diastolic
Date	28-May-1909 to 13-Jun-2025
	>= 130 as Number
	>= 80 as Number
Observation	
Category	Visit
Observation	
<input type="checkbox"/> (fast) Exact	BP systolic
or <input type="checkbox"/> (fast) Exact	BP diastolic
Date	13-Jun-2024
	> 1 as Number
	> 1 as Number
Medications	
Allergy	
Goals	
Billing	
Diagnosis	essential hypertension* 401 Starts
Bill Date	None
Appointment	

KK) **ESPCN - Quarterly QI – Pts with HTN, BP measured, 6months (Numerator)**

Demographics

Status Active

Primary Provider Kumar, Amit

Rostered Yes

Rostered Provider

Age Range 18 to

Profile

Visits

Task

Observation not

Category Visit

Observation

☐ (fast) Exact BP systolic (130) as Number

or ☐ (fast) Exact BP diastolic (80) as Number

Date 28-May-1909 to 13-Jun-2025

Observation not

Category Visit

Observation

☐ (fast) Exact BP systolic (1) as Number

or ☐ (fast) Exact BP diastolic (1) as Number

Date 14-Dec-2024

Medications

Allergy

Goals

Billing not

Diagnosis essential hypertension* 401 Starts

Bill Date Back All Front None

Appointment

LL) **ESPCN - Quarterly QI – Pts with HTN (Denominator)**

Demographics

Status Active

Primary Provider Unassigned

Rostered Yes

Rostered Provider

Age Range 18 to

Profile

Visits

Task

Observation not

Category Visit

Observation

☐ (fast) Exact BP systolic (130) as Number

or ☐ (fast) Exact BP diastolic (80) as Number

Date 28-May-1909 to 13-Jun-2025

Medications

Allergy

Goals

Billing not

Diagnosis essential hypertension* 401 Starts

Bill Date Back All Front None

Appointment

Outreach Queries

****NOTE:** Not all clinics will use no appt in 1 year with the primary provider. The length of time not in the clinic may vary depending on the number of patients due. Some clinics prefer no CPX in 1 year. Some clinics provide large amounts of cross coverage and have decided to use no appt with anyone instead of no appt with the primary provider. Discuss options with the IF.

A) ESPCN – Outreach – Pap Due, No Appt in 1 Year

Demographics	
Sex	Female
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	25 to 89
Profile	
Category	Medical
or	Surgical Hx
or	TAH
or	Total Hysterectomy
or	Total Abdominal Hysterectomy
or	Total Vaginal Hysterectomy
or	Complete Hysterectomy
Visits	
Task	
Category	Lab
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
or	DKML Cytology Gynecol
Order Type	Result
Task Date	20-Jun-2022 to 19-Jun-2025
Obs. Date	20-Jun-2022 to 19-Jun-2025
Task	
Category	Patient followup
Type	Adults- No Appt in
or	No Appt in 3 Years
Task Date	18-Mar-2025 to 19-Jun-2025
Observation	
Order Type	Result
Observation	(last) Cont: Gynecological Cytology 47527-7
Date	20-Jun-2022 to 19-Jun-2025
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status	Exclude Cancellati
Date	Back None Ahead 3 months
Appointment	
Type	All
Concern	Starts 1
Time Type	All
Minimum Duration	0 min
Requested By	
Status	Exclude Cancellati
Group	All
Provider or Resource	Ahmed, Ghalib
Resource	
Equipment	
Room	
Bill Status	All
Appt Time	hh:mm aa to hh:mm aa
Facility	
Date	Back 1 year Ahead None
Count	Equals

DKML Cytology Gynecological (contains)
 Gynecological Cytology (exact)
 Gynecological Cytology (starts with)
 , Gynecological Cytology (contains)
 , Gynecological Cytology, (contains)

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – Pap Due, No Appt in 1 Year - Ahmed

B) ESPCN – Outreach – Mammo Due, No Appt in 1 Year

Demographics	
Sex	Female
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	45 to 74
Profile	
Visits	
Task	
Category	Investigation
Type	Mammogram
Order Type	Result
Task Date	20-Jun-2023 to 19-Jun-2025
Obs. Date	20-Jun-2023 to 19-Jun-2025
Task	
Category	Investigation
Description	mammo
Order Type	Result
Task Date	20-Jun-2023 to 19-Jun-2025
Obs. Date	20-Jun-2023 to 19-Jun-2025
Task	
Category	Patient followup
Type	Adults- No Appt in 1 Year
Task Date	19-Jun-2025
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status	Exclude Cancellatic
Date	19-Jun-2025 to 20-Sep-2025
Appointment	
Type	All
Concern	Starts v
Time Type	All
Minimum Duration	0 min
Requested By	
Status	Exclude Cancellatic
Group	All
Provider or Resource	Ahmed, Ghalib
Resource	
Equipment	
Room	
Bill Status	All
Appt Time	hh:mm aa to hh:mm aa
Facility	
Date	1 year
Count	Equals

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – Mammo Due, No Appt in 1 Year - Ahmed

C) ESPCN – Outreach - CRC Due, No Appt in 1 Year

Demographics	
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	50 to 74
Profile	
Visits	
Task	
Category	Consult
or	Investigation
Description	Colonoscopy
Order Type	Result
Task Date	20-Jun-2015 to 19-Jun-2025
Obs. Date	20-Jun-2015 to 19-Jun-2025
Task	
Category	Lab
Description	Fecal Immunochemical
or	FIT
Order Type	Result
Task Date	20-Jun-2023 to 19-Jun-2025
Obs. Date	20-Jun-2023 to 19-Jun-2025
Task	
Category	Investigation
or	Consult
Description	Sigmoidoscopy
Order Type	Result
Task Date	20-Jun-2020 to 19-Jun-2025
Obs. Date	19-Jun-2020 to 19-Jun-2025
Task	
Category	Patient followup
Type	Adults- No Appt in
or	No Appt in 3 Years
Task Date	18-Mar-2025 to 19-Jun-2025
Observation	
Order Type	Result
Observation	(last) Exact Fecal Immunochemical 29771-3
Date	20-Jun-2023 to 19-Jun-2025
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status	Exclude Cancellati
Date	19-Jun-2025 to 20-Sep-2025
Appointment	
Type	All
Concern	Starts
Time Type	All
Minimum Duration	0 min
Requested By	
Status	Exclude Cancellati
Group	All
Provider or Resource	Ahmed, Ghalib
Resource	
Equipment	
Room	
Bill Status	All
Appt Time	hh:mm aa to hh:mm aa
Facility	
Date	Back 1 year Ahead None

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – CRC Due, No Appt in 1 Year - Ahmed

D) ESPCN – Outreach - Diabetes Due, No Appt in 1 Year

Demographics			
Status	Active		
Primary Provider	Ahmed, Ghalib		
Age Range	40	to	
Profile			
Visits			
Task			
Category	Lab		
Description	or Glucose, Fasting or A1c or Diabetes Screening Re		
Order Type	Result		
Task Date	20-Jun-2020 to 19-Jun-2025		
Obs. Date	19-Jun-2020 to 19-Jun-2025		
Task			
Category	Patient followup		
Type	Adults- No Appt in or No Appt in 3 Years		
Task Date	19-Jun-2025		
Observation			
Order Type	Result		
Observation	(last) Cont: Glucose Fasting 14771-0 or (last) Cont: Hemoglobin A1c 4548-4		
Date	19-Jun-2020 to 19-Jun-2025		
Medications			
Allergy			
Goals			
Billing			
Appointment			
Status	Exclude Cancellati		
Date	19-Jun-2025 to 20-Sep-2025		
Appointment			
Type	All		
Concern	Starts		
Time Type	All		
Minimum Duration	0 min		
Requested By			
Status	Exclude Cancellati		
Group	All		
Provider or Resource	Ahmed, Ghalib		
Resource			
Equipment			
Room			
Bill Status	All		
Appt Time	hh:mm aa to hh:mm aa		
Facility			
Date	Back 1 year Ahead None		
Count	Equals		

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – Diabetes Due, No Appt in 1 Year - Ahmed

E) ESPCN – Outreach – Due for Lipid Screening, No Appt in 1 Year

Demographics	
Status	Active
Primary Provider	Ahmed, Ghalib
Age Range	40 to 74
Profile	
Visits	
Task	
Category	Lab
Description	Lipid or Cardiovascular Disease
Order Type	Result
Task Date	20-Jun-2020 to 19-Jun-2025
Obs. Date	19-Jun-2020 to 19-Jun-2025
Task	
Category	Patient followup
Type	Adults- No Appt in or No Appt in 3 Years
Task Date	19-Jun-2025
Observation	
Category	Lab
Order Type	Result
Observation	Exac Cholesterol 14647-2
or	Exac HDL Cholesterol 14646-4
or	Exac LDL Cholesterol 39469-2
Date	19-Jun-2020 to 19-Jun-2025
Medications	
ATC Class	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	20-Jun-1951 to 19-Jun-2025
Medications	
Drug Name	crestor or lipitor or pravachol or zocor or atorvastatin or rosuvastatin or simvastatin or pravastatin
Active Status	Active Only
Start Date	20-Jun-1951 to 19-Jun-2025
Allergy	
Goals	
Billing	
Appointment	
Status	Exclude Cancellati
Date	19-Jun-2025 to 20-Sep-2025
Appointment	
Status	Exclude Cancellati
Provider or Resource	Ahmed, Ghalib
Date	Back 1 year Ahead None

Lipid (contains)

Cardiovascular Disease Risk Assessment (contains)

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – Lipids Due, No Appt in 1 Year – Ahmed

F) ESPCN – Outreach – Pediatrics, No Appt in 2 Years

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	Libsch, Karen
Age Range	0 to 17
Profile	
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status	Exclude Cancellatio
Provider or Resource	Libsch, Karen
Date	2 years
	None
Appointment	
Status	Exclude Cancellatio
Provider or Resource	All
Date	None
	3 months

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – Pediatrics, No Appt in 2 Years – Ahmed

G) ESPCN – Outreach – Adults, No Appt in 3 Years

Demographics	
Status	Active
Provider In Group	Physicians
Primary Provider	Libsch, Karen
Age Range	18 to 74
Profile	
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status	Exclude Cancellatio
Provider or Resource	Libsch, Karen
Date	Back 3 years Ahead None
Appointment	
Status	Exclude Cancellatio
Provider or Resource	All
Date	Back None Ahead 3 months

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – Adults, No Appt in 3 Years – Ahmed

H) ESPCN – Outreach – 75+ No Appt in 1 Year

Demographics	
Status +	Active
Provider In Group	Physicians
Primary Provider	Ahmed, Ghalib
Age Range	75 to
Profile	
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment + ✖ ✓ not	
Status +	Exclude Cancellati
Provider or Resource	Ahmed, Ghalib
Date	Back 1 year Ahead None
Appointment + ✖ ✓ not	
Status +	Exclude Cancellati
Provider or Resource	All
Date	Back None Ahead 3 months

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – 75+, No Appt in 1 Year – Ahmed

I) **ESPCN – Outreach – Chronic Disease, No Appt in 1 Year**

Demographics ✖

Status + Active ▾
 Primary Provider Ahmed, Ghalib ▾
 Age Range 0 to 74

Profile +

Visits +

Task + ✖ ✓ not

Category + Patient followup ▾
 Type + Adults- No Appt in 3 ▾ ✖
 or No Appt in 3 Years ▾ ✖
 Task Date Back 3 months ▾ Ahead None ▾

Observation +

Medications +

Allergy + ✖

Goals +

Billing + ✖ not

or		250	Starts ▾	✖
or		401	Starts ▾	✖
or		410	Starts ▾	✖
or		411	Starts ▾	✖
or		412	Starts ▾	✖
or		413	Starts ▾	✖
or		414	Starts ▾	✖
or		420	Starts ▾	✖
or		421	Starts ▾	✖
or		422	Starts ▾	✖
or		423	Starts ▾	✖
or		424	Starts ▾	✖
or		425	Starts ▾	✖
or		426	Starts ▾	✖
or		427	Starts ▾	✖
or		428	Starts ▾	✖
or		429	Starts ▾	✖
or		440	Starts ▾	✖
or		441	Starts ▾	✖
or		491	Starts ▾	✖
or		492	Starts ▾	✖
or		496	Starts ▾	✖
or		585	Starts ▾	✖
or		586	Starts ▾	✖

Bill Date ▾ Back All ▾ Ahead None ▾

Appointment + ✖ ✓ not

Status + Exclude Cancellatio ▾
 Provider or Resource Ahmed, Ghalib ▾
 Date Back 1 year ▾ Ahead None ▾

Appointment + ✖ ✓ not

Status + Exclude Cancellatio ▾
 Date Back None ▾ Ahead 3 months ▾

J)

****Create one report per doctor, name as above then note the doctor's name.**

Ex: ESPCN – Outreach – Chronic Disease, No Appt in 1 Year – Ahmed

Weekly Tracking Queries

K) ESPCN – Tracking – Screening Reviewed by PCCA

Demographics	
Provider In Group	Physicians
Primary Provider	All
Profile	
Visits	
Task	
Category	Patient followup
Description	Screening Reviewed by Cont.
Task Date	0 days
Status	Active
or	Complete
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	

L) ESPCN – Tracking – Pediatrics, 2 Years No Appt Outreach

Demographics	
Provider In Group	Physicians
Primary Provider	All
Profile	
Visits	
Task	
Category	Patient followup
Type	Pediatric Outreach
Task Date	6 days
Status	Active
or	Complete
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	

M) ESPCN – Tracking – Adults, 3 Years No Appt Outreach

Demographics	
Provider In Group	Physicians
Primary Provider	All
Profile	
Visits	
Task	
Category	Patient followup
Type	No Visit in 3 yrs
Task Date	6 days
Status	Active
or	Complete
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	

N) ESPCN – Tracking – Chronic Disease Outreach

Demographics ✖	
Provider In Group	Physicians ▼
Primary Provider	All ▼
Profile +	
Visits +	
Task + ✖ □ not	
Category +	Patient followup ▼
Type +	Chronic Disease ▼
Task Date	<small>Back</small> 6 days ▼ <small>Forward</small> None ▼
Status +	Active ▼ ✖ or Complete ▼ ✖
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment +	

O) ESPCN – Tracking – 75+ Outreach

Demographics ✖	
Provider In Group	Physicians ▼
Primary Provider	All ▼
Age Range	75 <input type="text"/> to <input type="text"/>
Profile +	
Visits +	
Task + ✖ □ not	
Category +	Patient followup ▼
Type +	75+ ▼
Task Date	<small>Back</small> 6 days ▼ <small>Forward</small> None ▼
Status +	Active ▼ ✖ or Complete ▼ ✖
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment +	

P) ESPCN – Tracking – Screening Outreach

Demographics					
Provider In Group	Physicians				
Primary Provider	All				
Profile					
Visits					
Task					
Category	Patient followup				
Type	Screening Outreac				
Task Date	Back 6 days	Ahead	None		
Observation					
Medications					
Allergy					
Goals					
Billing					
Appointment					

Building Dashboards

To support the work that the PCCA's will be doing we will create 2-3 dashboards per clinic. ESPCN – Outreach, ESPCN – Quarterly Reports and in clinics with 2+ physicians, ESPCN – Quarterly QI.

To build a dashboard go into Templates and then Dashboards. Click New.



When your new window opens, give your dashboard a name. We are creating 2 dashboards; ESPCN – Outreach and ESPCN – Quarterly Reporting. The Outreach dashboard contains all of the regular weekly work for the PCCA while the Quarterly Reporting dashboard houses all of the require information for the Perform PCN Quarterly reports.

Name	Description	Dashboard Type	Display Icon	Edit Privilege	User Privilege	Dashboard Criteria
		Main	Control Panel	Private	Private	None

BLUE: Enter your dashboard Name in the name field. Either ESPCN – Outreach, ESPCN – Quarterly Reporting, or ESPCN – Quarterly QI.

TEAL: In the description, enter ESPCN – PCCA Outreach, ESPCN – PCCA Quarterly Reporting, or ESPCN – Quarterly QI Reporting.


PURPLE: The dashboard type should be Main.

GREEN: Set your display icons to chart, line chart or control panel.

PINK: Set the Edit Privilege and Use Privilege as Private while building the dashboard, then change the use to all users once completed.

Save once complete.

The dashboard will automatically open the widget creator for the first widget. To create the additional widgets, right click in the white space in the dashboard. Select add new item -> Add reports item to “___” dashboard.



New Dashboard Item

Context: [Dropdown]
 Display Name: [Text]
 Color: Light Violet [Color Picker]
 Height: Fit all content [Dropdown]
 Width: X-Small (25%) [Dropdown]
 Auto-Refresh? [Checkbox]
 Save Item Cancel

The Context is what kind of information you would like the widget to populate. Most of the widgets we will create are Reporting. Once you select reporting more options will open.



New Dashboard Item

Context: Reporting [Dropdown]
 Type: Favourite Filters [Dropdown]
 Display Name: [Text]
 Help Key: Reporting [Dropdown]
 Color: Light Violet [Color Picker]
 Height: Fit all content [Dropdown]
 Width: X-Small (25%) [Dropdown]
 Auto-Refresh? [Checkbox]
 Save Item Cancel

Change the type to statistics. Set the display name for the appropriate heading for the widget Ex: Pap Screening, Screening Outreach. For color, leave them all the standard color that populates, once you have all your widgets created change the color scheme to group the widgets together. *Example: Quarterly Reporting is grouped by color to coordinate with the quarter that items are reported during.*

Height should be fit all and the width will vary. While building, set it to x-small, it provides you with the greatest availability for layout options. Save each item once completed.

Once you have all your widgets completed, click the widget header, and drag and drop them into columns. You must pull the first one in each column up to the top where there are dashed lines.

Once you have your widgets sorted in columns, starting at the top, change the width to small for each one.

Quarterly Reporting Dashboard

Q1 - Lifestyle Reporting ESPCR - Quarterly - Lifestyle Assessment Due ESPCR - Quarterly - Tobacco Assessment Due ESPCR - Quarterly - Angiogram Due Count Patient Head 1213 Resident Headcount 174 Menominee At-Risk 174 Total 2061	Q1Q2 - Pap Screening ESPCR - Quarterly - Pap Due ESPCR - Quarterly - Pap Due Count Patient Head 698 Resident Headcount 211 Menominee At-Risk 262 Total 1171	Q3 Q4 - Patient Age ESPCR - Full Panel At-Risk ESPCR - Full Panel Headcount ESPCR - Full Panel Head Count 0-9 138 10-19 143 20-29 117 30-39 117 40-49 117 50-59 117 60-69 117 70-79 117 80-89 117 90-99 117 Total 1171
Q1 - CV Risk Screening ESPCR - Quarterly - CV Risk Due ESPCR - Quarterly - CV Risk Due Count Patient Head 144 Resident Headcount 111 Menominee At-Risk 111 Total 366	Q1Q2 - Mammography Screening ESPCR - Quarterly - Mammography Due ESPCR - Quarterly - Mammography Due Count Patient Head 222 Resident Headcount 111 Menominee At-Risk 111 Total 444	Q3 Q4 - Patient Gender ESPCR - Full Panel At-Risk ESPCR - Full Panel Headcount ESPCR - Full Panel Head Count Menominee At-Risk 117 Female 117 Male 117 Total 234
Q1 - Vitals Reporting ESPCR - Quarterly - BP Screening ESPCR - Quarterly - Height & Weight Screening ESPCR - Quarterly - Weight/BMI Count Patient Head 111 Resident Headcount 111 Menominee At-Risk 111 Total 333	Q1Q2 - CRC Screening ESPCR - Quarterly - CRC Due ESPCR - Quarterly - CRC Due Count Patient Head 111 Resident Headcount 111 Menominee At-Risk 111 Total 333	Q3 Q4 - Verification Rate ESPCR - VQ - 34% of Patients Verified ESPCR - VQ - 64% of Patients Verified ESPCR - VQ - 20% of Patients Verified ESPCR - VQ - 20% of Patients Verified Count Patient Head 111 Resident Headcount 111 Menominee At-Risk 111 Total 333
Q1 - Diabetes Screening ESPCR - Quarterly - Diabetes Due ESPCR - Quarterly - Diabetes Due Count Patient Head 111 Resident Headcount 111 Menominee At-Risk 111 Total 333	Q1Q2 - Lipids Screening ESPCR - Quarterly - Lipids Due ESPCR - Quarterly - Lipids Due Count Patient Head 111 Resident Headcount 111 Menominee At-Risk 111 Total 333	

Below is how to set up the widgets.

Quarterly Reporting – Q1 - Lifestyle Widget

Q1 - Lifestyle Reporting

Context: Reporting
 Type: Statistics
 Filters: -- Add --
 ESPCN - Quarterly - Eligible 18+ (Vitals & Lifestyle)
 ESPCN - Quarterly - Tobacco Due
 ESPCN - Due for Exercise Assessment

Display Name: Q1 - Lifestyle Reporting
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐
 Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Light Violet
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

Quarterly Reporting – Q1 – Vitals Widget

Q1 - Vitals Reporting

Context: Reporting
 Type: Statistics
 Filters: -- Add --
 ESPCN - Quarterly - Height & Weight Screened
 ESPCN - Quarterly - Eligible 18+ (Vitals & Lifestyle)
 ESPCN - Quarterly - BP Screened

Display Name: Q1 - Vitals Reporting
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐
 Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Light Violet
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

Quarterly Reporting – Q1 – CV Risk Screening Widget

Q1 - CV Risk Screening

Context: Reporting
 Type: Statistics
 Filters: -- Add --
 ESPCN - Quarterly - CVR Due
 ESPCN - Quarterly - CVR Eligible

Display Name: Q1 - CV Risk Screening
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐
 Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Light Violet
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

Quarterly Reporting – Q1/Q3 - Pap Widget

Q1/Q3 - Pap Screening

Context: Reporting
 Type: Statistics
 Filters: -- Add --
 ESPCN - Due for Pap
 ESPCN - Eligible for Pap


Display Name: Q1/Q3 - Pap Screening
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐
 Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Light Turquoise
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

Quarterly Reporting – Q1/Q3 - Mammogram Widget

Q1/Q3 Mammo Screening ✕

Context: Reporting ▼
 Type: Statistics ▼
 Filters: -- Add -- ▼
 ✕ ESPCN - Due for Mammo
 ✕ ESPCN - Eligible for mammo


Display Name: Q1/Q3 Mammo Screenin
 Statistic: Count ▼ +
 Group By: Primary Provider ▼
 Then Group By: ▼
 Output Type: Table ▼ Default trend? ☐
 Truncate table text? ☐
 Limit: All ▼
 Order: Aggregate ▼
 Help Key: Reporting ▼
 Color: Light Turquoise ▼ 
 Height: Fit all content ▼
 Width: Small (33%) ▼

Save Item Cancel

Quarterly Reporting – Q1/Q3 - CRC Widget

Q1/Q3 - CRC Screening ✕

Context: Reporting ▼
 Type: Statistics ▼
 Filters: -- Add -- ▼
 ✕ ESPCN - Due for CRC
 ✕ ESPCN - Eligible for CRC


Display Name: Q1/Q3 - CRC Screening
 Statistic: Count ▼ +
 Group By: Primary Provider ▼
 Then Group By: ▼
 Output Type: Table ▼ Default trend? ☐
 Truncate table text? ☐
 Limit: All ▼
 Order: Aggregate ▼
 Help Key: Reporting ▼
 Color: Light Turquoise ▼ 
 Height: Fit all content ▼
 Width: Small (33%) ▼

Save Item Cancel

Quarterly Reporting – Q1/Q3 - Diabetes Widget

Q1/Q3 Diabetes Screening ✕

Context: Reporting ▼
 Type: Statistics ▼
 Filters: -- Add -- ▼
 ✕ ESPCN - Due for Diabetes Screening
 ✕ ESPCN - Eligible for Diabetes
 Screening


Display Name: Q1/Q3 Diabetes Screeni
 Statistic: Count ▼ +
 Group By: Primary Provider ▼
 Then Group By: ▼
 Output Type: Table ▼ Default trend? ☐
 Truncate table text? ☐
 Limit: All ▼
 Order: Aggregate ▼
 Help Key: Reporting ▼
 Color: Light Turquoise ▼ 
 Height: Fit all content ▼
 Width: Small (33%) ▼

Save Item Cancel

Quarterly Reporting – Q1/Q3 - Lipid Widget

Q1/Q3 - Lipid Screening ✕

Context: Reporting ▼
 Type: Statistics ▼
 Filters: -- Add -- ▼
 ✕ ESPCN - Due for Lipids
 ✕ ESPCN - Eligible for Lipids

Display Name: Q1/Q3 - Lipid Screening
 Statistic: Count ▼ +
 Group By: Primary Provider ▼
 Then Group By: ▼
 Output Type: Table ▼ Default trend? ☐
 Truncate table text? ☐
 Limit: All ▼
 Order: Aggregate ▼
 Help Key: Reporting ▼
 Color: Light Turquoise ▼ 
 Height: Fit all content ▼
 Width: Small (33%) ▼


Save Item Cancel

Quarterly Reporting – Q2/Q4 - Panel by Age Widget

Q2/Q4 - Panel By Age ✕

Context: Reporting ▼
 Type: Statistics ▼
 Filters: -- Add -- ▼

✕ ESPCN - Mah Full Panel
 ✕ ESPCN - Nishiwaki Full Panel
 ✕ ESPCN - Theman Full Panel
 ✕ ESPCN - Yao Full Panel
 ✕ ESPCN - Zaidi Full Panel

Display Name: Q2/Q4 - Panel By Age
 Statistic: Count ▼ +
 Group By: Age Group - 10 Year ▼
 Then Group By: ▼
 Output Type: Table ▼ Default trend? ☐
 Truncate table text? ☐
 Limit: All ▼
 Order: Aggregate ▼
 Help Key: Reporting ▼
 Color: Bill Blue ▼ 
 Height: Fit all content ▼
 Width: Small (33%) ▼


Save Item Cancel

Quarterly Reporting – Q2/Q4 - Panel by Gender Widget

Q2/Q4 - Panel By Gender ✕

Context: Reporting ▼
 Type: Statistics ▼
 Filters: -- Add -- ▼

✕ ESPCN - Mah Full Panel
 ✕ ESPCN - Nishiwaki Full Panel
 ✕ ESPCN - Theman Full Panel
 ✕ ESPCN - Yao Full Panel
 ✕ ESPCN - Zaidi Full Panel

Display Name: Q2/Q4 - Panel By Gender
 Statistic: Count ▼ +
 Group By: Primary Provider ▼
 Then Group By: Gender ▼
 Output Type: Table ▼ Default trend? ☐
 Truncate table text? ☐
 Limit: All ▼
 Order: Aggregate ▼
 Help Key: Reporting ▼
 Color: Bill Blue ▼ 
 Height: Fit all content ▼
 Width: Small (33%) ▼


Save Item Cancel

Quarterly Reporting – Q2/Q4 - Verification Rate Widget

Q2/Q4 - Verification Rate ✕

Context: Reporting ▼
 Type: Statistics ▼
 Filters: -- Add -- ▼

✕ ESPCN - # of Patients Verified in 6 Months
 ✕ ESPCN - # of Appointments in 6 Months
 ✕ ESPCN - # of Patients Verified in 3 Years
 ✕ ESPCN - # of Appointments in 3 Years

Display Name: Q2/Q4 - Verification Rate
 Statistic: Count ▼ +
 Group By: Primary Provider ▼
 Then Group By: ▼
 Output Type: Table ▼ Default trend? ☐
 Truncate table text? ☐
 Limit: All ▼
 Order: Aggregate ▼
 Help Key: Reporting ▼
 Color: Bill Blue ▼ 
 Height: Fit all content ▼
 Width: Small (33%) ▼

Save Item Cancel

Outreach Dashboard




PCCA Weekly Tracking: Record These Weekly		ESPCN - Population Outreach - Dr. Adertinghe
ESPCN - Tracking - No Appt in 2 Years (5 Yr) Outreach ESPCN - Tracking - Chronic Disease Outreach Adertinghe Adertinghe Janine Karpatka Total	ESPCN - Tracking - No Appt in 1 Year (5 Yr) Outreach ESPCN - Tracking - Screening Outreach ESPCN - Tracking - Screening Reviewed by PCCA Count 3 1 4	ESPCN - Outreach - No Appt in 2 years (5 Yr) - Adertinghe ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Adertinghe Adertinghe Adertinghe Total ESPCN - Population Outreach - Dr. Karpatka ESPCN - Outreach - No Appt in 2 Years (5 Yr) - Karpatka ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Karpatka Janine Karpatka Total ESPCN - Population Outreach - Dr. Wurm ESPCN - Outreach - No Appt in 2 Years (5 Yr) Wurm ESPCN - Outreach - Chronic Disease, No Appt in 1 Year (Wurm) No data found matching filter Screening Outreach - No Appt in 1 Year - Dr. Adu ESPCN - Outreach - Pap Due, No Appt in 1 Year - Adu ESPCN - Outreach - CRC Due, No Appt in 1 Year - Adu ESPCN - Outreach - Diabetes Due, No Appt in 1 Year - Adu Adertinghe Adertinghe Total Screening Outreach - No Appt in 1 Year - Dr. Karpatka ESPCN - Outreach - Pap Due, No Appt in 1 Year - Karpatka ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Karpatka ESPCN - Outreach - Diabetes Due, No Appt in 1 Year - Karpatka Janine Karpatka Total Screening Outreach - No Appt in 1 Year - Dr. Wurm ESPCN - Outreach - Pap Due, No Appt in 1 Year (Wurm) ESPCN - Outreach - CRC Due, No Appt in 1 Year (Wurm) ESPCN - Outreach - Diabetes Due, No Appt in 1 Year (Wurm) ESPCN - Outreach - Lipids Due, No Appt in 1 Year (Wurm) Unwanted "Wurm" System Total

Weekly Tracking – For Tracking Sheet Widget

Weekly Tracking - For Tracking Sheet		
Context	Reporting	
Type	Statistics	
Filters	-- Add --	
	<div> <div>✖</div> <div>ESPCN - Tracking - Screening</div> </div> <div>Reviewed by PCCA</div> <div> <div>✖</div> <div>ESPCN - Tracking - 75+ Outreach</div> </div> <div> <div>✖</div> <div>ESPCN - Tracking - Chronic Disease Outreach</div> </div> <div> <div>✖</div> <div>ESPCN - Tracking - Screening Outreach</div> </div> <div> <div>✖</div> <div>ESPCN - Tracking - No Appt in 3 Years Outreach</div> </div> <div> <div>✖</div> <div>ESPCN - Tracking - No Appt in 2 Years Outreach</div> </div>	
Display Name	Weekly Tracking - For Tr	
Statistic	Count	
Group By	Primary Provider	
Then Group By		
Output Type	Table	Default trend? <input type="checkbox"/>
	Truncate table text? <input type="checkbox"/>	
Limit	All	
Order	Count (Ascending)	
Help Key	Reporting	
Color	Light Blue	
Height	Fit all content	
Width	Medium (50%)	
Save Item		Cancel

Third Next Available Widget for how to create the filter, go to [Creating a Third Next Available Filter](#).

TNA

Context	Find Availability	▼	
Type	Statistics	▼	
Filters	-- Select --	▼	 
Display Name	TNA		
Statistic	3rd Next Available [C]		
Output Type	Table	▼	Default trend? <input type="checkbox"/>
	Truncate table text? <input type="checkbox"/>		
Limit	All	▼	
Order	Count (Ascending)	▼	
Help Key	Schedule	▼	
Color	Light Blue	▼	
Height	Medium (50%)	▼	
Width	Medium (50%)	▼	

Save Item Cancel

Adults, No Appt 3 Years Outreach Widget

Population Outreach - No Appt in 3 Years

Context: Reporting
 Type: Statistics
 Filters: -- Add --

✖ ESPCN - Outreach - No Appt in 3 Years - Marcet
 ✖ ESPCN - Outreach - No Appt in 3 Years - Safranovich
 ✖ ESPCN - Outreach - No Appt in 3 Years - Ahmed
 ✖ ESPCN - Outreach - No Appt in 3 Years - Tindall
 ✖ ESPCN - Outreach - No Appt in 3 Years - Corrigan
 ✖ ESPCN - Outreach - No Appt in 3 Years - Blais

Display Name: Population Outreach - No Appt in 3 Years
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐ Default trend? ☐

Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Violet
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

75+ Outreach Widget

Population Outreach - 75+, No Appt in 1 Year

Context: Reporting
 Type: Statistics
 Filters: -- Add --

✖ ESPCN - Outreach - 75+, No Appt in 1 Year - Marcet
 ✖ ESPCN - Outreach - 75+, No Appt in 1 Year - Safranovich
 ✖ ESPCN - Outreach - 75+, No Appt in 1 Year - Tindall
 ✖ ESPCN - Outreach - 75+, No Appt in 1 Year - Ahmed
 ✖ ESPCN - Outreach - 75+, No Appt in 1 Year - Blais
 ✖ ESPCN - Outreach - 75+, No Appt in 1 Year - Corrigan

Display Name: Population Outreach - 75+, No Appt in 1 Year
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐ Default trend? ☐

Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Violet
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

Chronic Disease Outreach Widget

Population Outreach - Chronic Disease

Context: Reporting
 Type: Statistics
 Filters: -- Add --

✖ ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Marcet
 ✖ ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Safranovich
 ✖ ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Tindall
 ✖ ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Ahmed
 ✖ ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Blais
 ✖ ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Corrigan

Display Name: Population Outreach - Chronic Disease
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐ Default trend? ☐

Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Violet
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

Screening Outreach Widget (one per Dr.)

Screening Outreach - Dr. Ahmed

Context: Reporting
 Type: Statistics
 Filters: -- Add --

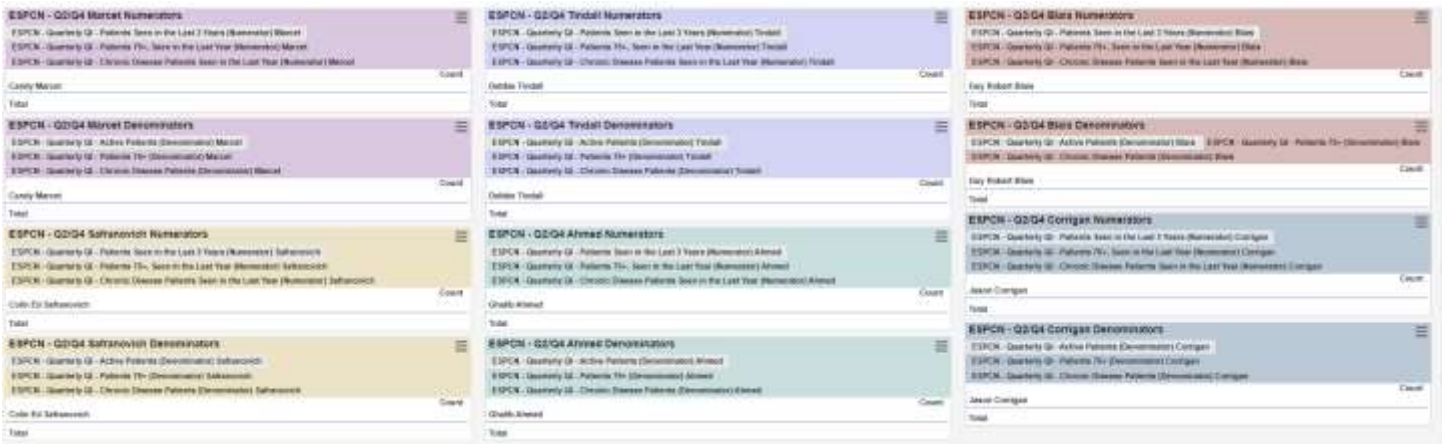
✖ ESPCN - Outreach - Pap Due, No Appt in 1 Year (Ahmed)
 ✖ ESPCN - Outreach - Mammo Due, No Appt in 1 Year (Ahmed)
 ✖ ESPCN - Outreach - CRC Due, No Appt in 1 Year (Ahmed)
 ✖ ESPCN - Outreach - Diabetes Due, No Appt in 1 Year (Ahmed)
 ✖ ESPCN - Outreach - Lipids Due, No Appt in 1 Year (Ahmed)

Display Name: Screening Outreach - Dr. Ahmed
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table
 Truncate table text? ☐ Default trend? ☐

Limit: All
 Order: Aggregate
 Help Key: Reporting
 Color: Goal Violet
 Height: Fit all content
 Width: Small (33%)

Save Item Cancel

Quarterly QI Dashboard



Each physician will require a numerator and denominator widget.

ESPCN - Q2/Q4 Ahmed Numerators

ContextReporting

TypeStatistics

Filters-- Add --

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

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

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

Display NameESPCN - Q2/Q4 Ahmed

StatisticCount

Group ByPrimary Provider

Then Group By

Output TypeTable

Truncate table text?

LimitAll

OrderAggregate

Help KeyReporting

ColorLight Turquoise

HeightFit all content

WidthSmall (33%)

Save Item

Cancel

ESPCN - Q2/Q4 Ahmed Denominators

ContextReporting

TypeStatistics

Filters-- Add --

✖ ESPCN - Quarterly QI - Active Patients (Denominator) Ahmed

✖ ESPCN - Quarterly QI - Patients 75+ (Denominator) Ahmed

✖ ESPCN - Quarterly QI - Chronic Disease Patients (Denominator) Ahmed

Display NameESPCN - Q2/Q4 Ahmed

StatisticCount

Group ByPrimary Provider

Then Group By

Output TypeTable

Truncate table text?

LimitAll

OrderAggregate

Help KeyReporting

ColorLight Turquoise

HeightFit all content

WidthSmall (33%)

Save Item

Cancel

Creating a QI Physicians Group


1. You must have administrative access or request a staff member with administrative access to complete the following steps.
2. Go into Profile in the top left corner of your Med Access.
3. Click on User Groups in the list on the left.
4. Click on New Group
5. Under General, the name is QI Physicians, then save

General Settings

Name:

Sequence Number:

Appointment Interval:

6. Next go over to the Members tab. Add appropriate physicians from the list on the right by clicking the Add Button 
7. Once the group is created, you can substitute it in the reports builder by selecting it under the Demographics tab – Provider Group. The default option for Primary Provider will change to All.

Primary Provider	All	▼
Sec. Provider		▼
Referring Provider		
Family Provider		
Provider Group	QI Physicians	▼


Creating a Third Next Available Filter

To create a filter, go into Templates -> Filters. Click New to create a new filter.


Complete the filter configuration as follows (use whichever display icon you would like):

Filter Configuration	
Name	3rd Next Available
Display Name	3rd Next Available
Item Context	Find Availability
Edit Privilege	Public
Use Privilege	All Users
Date Criteria Type	Relative
Set Workflow Step	
Display Icon	Heart

When you set the Item Context as Find Availability, the follow options will appear.

Default Criteria					
Date of:	Appointment	Start:	All	End:	All
				Provider or Resource:	All
					Limit: 1
					
<input type="button" value="Save"/>					

Use the blue arrow to add additional items and set the filter criteria as follows:

Default Criteria							
Date of:	Appointment	Start:	Today	End:	All	Group:	Physicians
Status:	Exclude C	Start Time:		Type:	All	Provider or Resource:	All
				Time Type:	All		Limit: 100
							
<input type="button" value="Save"/>							

Save once completed. You can now use this to create your Third Next Available Widget.

Creating CDS Notifications

With permission from the physician's or clinic, create notifications to alert the providers that patients are due for pap, mammo, CRC, diabetes, and lipid screening.

To create CDS Notifications, use your due queries that you created for quarterly reporting. To open these items, with the appropriate report selected, click on the widget header to open the query in the reporting screen. Alternatively, select Reports along the top of the screen and use the drop-down menu to select the appropriate query.

Q1/Q3 - Pap Screening	
ESPCN - Quarterly - Pap Due	ESPCN - Quarterly - Pap Eligible
Count	
Candy Marcet	
Colin Ed Safranovich	
Debbie Tindall	
Ghalib Ahmed	
Guy Robert Blais	
Jason Corrigan	
Total	

Or



Criteria Unmask

Template: Select Template... Create New Template from Existing

Demographics

Once you have your report open, click on the **Create New Template from Existing** button.

At the top of the Create Advanced Search Template window you will see the following fields.

Template Name:	<input type="text"/>
Copy Template:	<input type="text"/>
Type:	Practice Mgmt
Report:	Patients List
Secondary Template:	Select Template...
Trigger:	
Service:	
Task:	
Profile:	
Care Plan:	
Edit Privilege:	All Users
Use Privilege:	All Users

Enter the template name, for example Due for Pap Notification. Set the type as **CDS**, this will cause some additional fields to populate.

The screenshot shows a configuration form for a CDS template. The form has two columns. The left column contains labels for various fields: Template Name, Copy Template, Type, Report, Trigger, Pop-up, Service, Task, Profile, Case Note, CDS Match Message, CDS No Match Message, Edit Privilege, Use Privilege, Date criteria type, and Append additional criteria. The right column contains the corresponding values: Pap Due Notification, CDS, Patient Load, None, and Due for Pap. The Trigger field is highlighted with an orange box, and the CDS Match Message field is highlighted with a purple box.

Template Name:	Pap Due Notification
Copy Template:	
Type:	CDS
Report:	
Trigger:	Patient Load
Pop-up:	None
Service:	
Task:	
Profile:	
Case Note:	
CDS Match Message:	Due for Pap
CDS No Match Message:	
Edit Privilege:	All Users
Use Privilege:	All Users
Date criteria type:	Relative
Append additional criteria:	-- Add --

Set the **trigger** to show where you would like the notification to appear, you can set it to Patient Load, and it will appear in all areas of the chart. Or you can set it as Appointments to display on the schedule, you can also set it to display when specific areas of the chart is open.

In the **CDS Match Message**, add in Due for Pap. This message will appear if someone meets the criteria you have created in the report.

Save once completed. Once saved, this notification will activate for you only. Go into Templates -> CDS and right click on each notification and enable them for all users.

The screenshot shows a user selection interface. On the left, there is a list of users with checkboxes: All Users, Physicians, and Stephanie Gosche User Group. On the right, there are two buttons: 'Enable CDS Warning for group >' and 'Disable CDS Warning for group >'. The 'Enable CDS Warning for group >' button is highlighted.

<input checked="" type="checkbox"/> All Users	Enable CDS Warning for group >
<input checked="" type="checkbox"/> Physicians	Disable CDS Warning for group >
<input checked="" type="checkbox"/> Stephanie Gosche User Group	

All users will now be able to see the notifications you have created.

Clinic Setup Checklist

1. Create Task Templates for Outreach/Tracking
 - a. Screening Reviewed by PCCA
 - b. Patient Outreach
2. Create Types for Outreach
 - a. Screening Outreach
 - b. No Appt in 3 Years
 - c. 75+
 - d. Chronic Disease
3. Create Observations and Task Templates for Adding Results
 - a. Pap Results
 - b. Mammo Results
 - c. FIT Results
 - d. Sigmoidoscopy Results
 - e. Colonoscopy Results
 - f. Diabetes Results
 - g. Lipid Panel Results
4. Create Quarterly Reporting Queries
 - a. ESPCN – Quarterly – Panel Full – 1 per doc
 - b. ESPCN – Quarterly – Eligible 18+
 - c. ESPCN – Quarterly – BP Due
 - d. ESPCN – Quarterly – Height & Weight Due
 - e. ESPCN - Quarterly – Exercise Due
 - f. ESPCN - Quarterly – Tobacco Due
 - g. ESPCN – Quarterly – Pap Eligible
 - h. ESPCN - Quarterly – Pap Due
 - i. ESPCN – Quarterly – Mammo Eligible
 - j. ESPCN – Quarterly - Mammo Due
 - k. ESPCN – Quarterly – CRC Eligible
 - l. ESPCN - Quarterly – CRC Due
 - m. ESPCN – Quarterly – Diabetes Eligible
 - n. ESPCN - Quarterly – Diabetes Due
 - o. ESPCN - Quarterly – Lipids Eligible
 - p. ESPCN - Quarterly – Lipids Due
 - q. ESPCN – Quarterly – CV Risk Eligible
 - r. ESPCN - Quarterly – CV Risk Due
 - s. ESPCN – Quarterly – VR – Appointments in 3 Years
 - t. ESPCN – Quarterly – VR – Verified in 3 Years
 - u. ESPCN – Quarterly – VR - Appointments in 6 Months
 - v. ESPCN – Quarterly – VR - Verified in 6 Months
 - w. ESPCN – Quarterly QI – Active Panel (Denominator) – 1 per doc
 - x. ESPCN – Quarterly QI – Patients Seen in the Last 3 Years (Numerator) – 1 per doc
 - y. ESPCN – Quarterly QI – Patients 75+ (Denominator) – 1 per doc
 - z. ESPCN – Quarterly QI – Patients 75+, Seen in the Last Year (Numerator) – 1 per doc
 - aa. ESPCN – Quarterly QI – Chronic Disease Patients (Denominator) – 1 per doc
 - bb. ESPCN – Quarterly QI – Chronic Disease Patients, Seen in the Last Year (Numerator) – 1 per doc

5. Create Outreach Queries
 - a. ESPCN – Outreach – Pap Due, No Appt in 1 Year – 1 per doc
 - b. ESPCN – Outreach – Mammo Due, No Appt in 1 Year – 1 per doc
 - c. ESPCN – Outreach – CRC Due, No Appt in 1 Year – 1 per doc
 - d. ESPCN – Outreach – Diabetes Due, No Appt in 1 Year – 1 per doc
 - e. ESPCN – Outreach – Lipids Due, No Appt in 1 Year – 1 per doc
 - f. ESPCN – Outreach – Pediatrics, No Appt in 2 Years – 1 per doc
 - g. ESPCN – Outreach – Adults, No Appt in 3 Years – 1 per doc
 - h. ESPCN – Outreach – 75+, No Appt in 1 Year – 1 per doc
 - i. ESPCN - Outreach – Chronic Disease, No Appt in 1 Year – 1 per doc
6. Create Weekly Tracking Queries
 - a. ESPCN – Tracking – Screening Reviewed by PCCA
 - b. ESPCN – Tracking – Pediatrics, No Appt in 2 Years
 - c. ESPCN – Tracking – Adults, No Appt in 3 Years
 - d. ESPCN – Tracking – 75+
 - e. ESPCN – Tracking – Chronic Disease
 - f. ESPCN – Tracking – Screening Outreach
7. Create Dashboards
 - a. ESPCN – Quarterly Reports
 - b. ESPCN – Outreach
 - c. ESPCN – Quarterly QI (if more than 2 docs)
8. Create CDS Notifications
 - a. Due for Pap
 - b. Due for Mammo
 - c. Due for CRC
 - d. Due for Diabetes
 - e. Due for Lipids