Med Access PCCA Setup

Updated June 2025

Contents

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 curser 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.
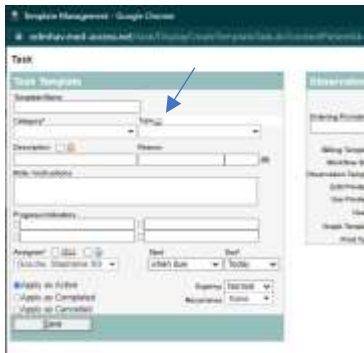
To add in the new task types, click on the description line and enter the name you would like to add. Then click the add button. Add in each additional task type. If you would like to change the order that they appear in the list, change the sort number. The lower the number, the higher in the list it 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).

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.


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.
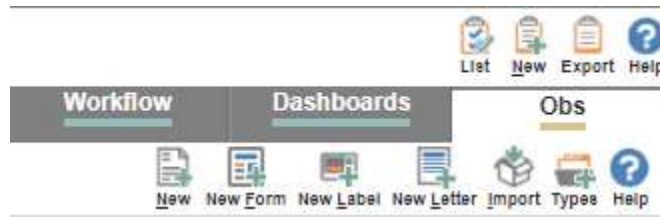
Then select Lists.

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.
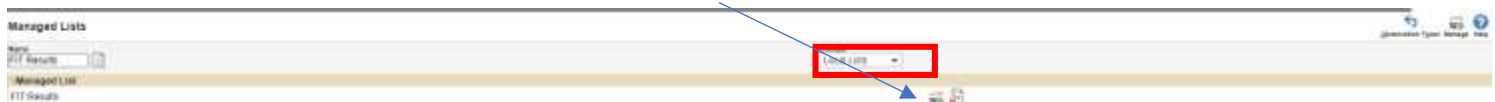
You will then add the items you would like to have appear in your dropdown for your FIT result. In the description field add in Negative and select the add button. Also add in Positive and select the add button. If you need to change the order they appear in, change the numbers in the sort field. If 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.
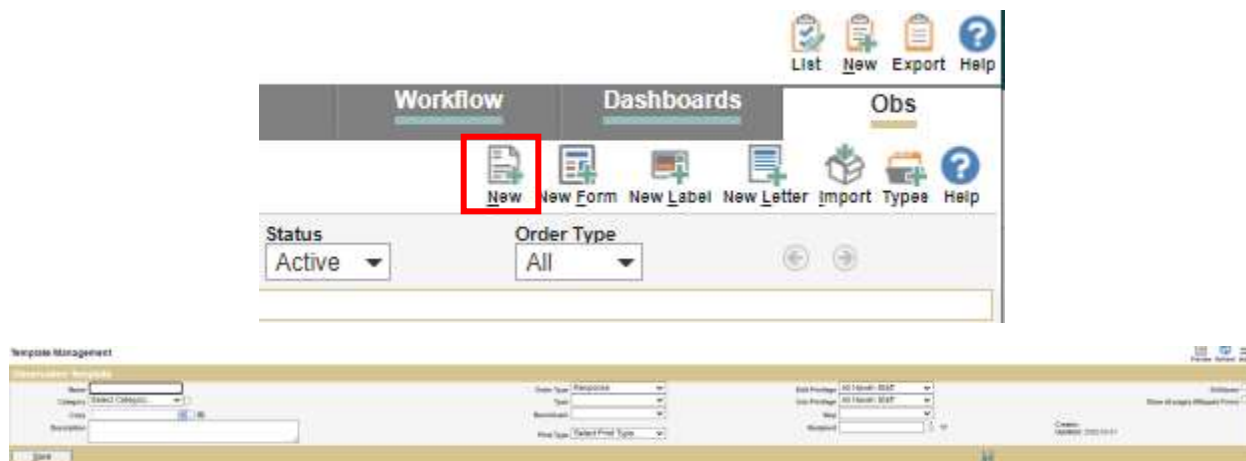
Add in the observation template name: FIT Results

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.

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.

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:

For the task template:

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

Lipid Screening

For the observations:

Observation Type

Observation Name	Data Type	Managed List	Order	Increment
HDL Cholesterol	Numeric		1	

CDS Criteria

Instruction/Note

Question

Units/Format	Display Range	Lower Range	Upper Range	Drilldown Template	Default Graph Template
					*Lipid Panel

System

Code
14646-4

Synonyms
cholesterol in hdl, hdl, hdl - 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	Hide Observation Label	Enable add-on usage	Auto Invoke Drilldown	Don't Display Value in History	Allow Overflow
		☐	☐	☐	☐

Validation

Print Type

Mapped Display Field

Allergy Classification

Calculation

Parent Flag & ID

Use Privilege	Edit Privilege
Public	Public

User Defined Calculation Expression

Apply Save: ☐

Observation Type

Observation Name	Data Type	Managed List	Order	Increment
LDL Cholesterol	Numeric		2	

CDS Criteria

Instruction/Note

Question

Units/Format	Display Range	Lower Range	Upper Range	Drilldown Template	Default Graph Template
					*Lipid Panel

System

Code
39469-2

Synonyms
cholesterol in ldl, ldl, ldl - 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	Hide Observation Label	Enable add-on usage	Auto Invoke Drilldown	Don't Display Value in History	Allow Overflow
		☐	☐	☐	☐

Validation

Print Type

Mapped Display Field

Allergy Classification

Calculation

Parent Flag & ID

Use Privilege	Edit Privilege
Public	Public

User Defined Calculation Expression

Apply Save: ☐

For the task template:

Pap Test Results

For the observations:

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

Pap Results Dropdown Management

Table	Description	Code		Use Privilege			Edit Privilege			
Pap Results Dropdown				Public			Public			

Name	Code	Active	Sort			
NIL	2064393	✓	10			
ASCUS	2064394	✓	20			
ASC-H	2140112	✓	30			
AGC	2132109	✓	40			
HSIL	2064395	✓	50			
LSIL	2064396	✓	60			
AIS, SCC, Other Cancers	2140115	✓	70			
Inadequate Sample	2140116	✓	80			

For the observation template:

Observation Template

Name	Pap Results		Order Type	Response	Edit Privilege	All Users	Drilldown ☐
Category	Lab		Type		Use Privilege	All Users	Show all pages (Mapped Form) ☐
Copy			Step				
Description	Gynecological Cytology Results		Print Type	Select Print Type	Recipient		Creator: Raay, Samantha Updated: 2022-04-01

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

Save

Observation Type

Observation Name	Data Type	Managed List	Order	Increment
Gynecological Cytology	Dropdown	Pap Results	11511	

CDS Criteria

Instruction/Note

Question

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

System	Code			Synonyms
	47527-7			

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

Disable Comment	Hide Observation Label	Enable add-on usage	Auto Invoke Drilldown	Don't Display Value in History	Allow Overflow
☐	☐	☐	☐	☐	☐

Validation	Print Type		

Mapped Display Field	Allergy Classification		

Calculation	Parent Flag & ID	Use Privilege	Edit Privilege
		Public	Public

User Defined Calculation Expression

Apply Save ☐

For the task template:

Task Template

Template Name
Pap Results

Category*
Lab

Type

Description ☐ 🔒
Gynecological Cytology

Reason
per netcare, Dr

Note / Instructions

Progress Indicators
☐
☐

Assignee*
Assign to user

Start
when due

Due*
Today

Last Update: Stephanie 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 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	✓	0				
BIRADS 1	2064406	✓	0				
BIRADS 2	2064407	✓	0				
BIRADS 3	2064408	✓	0				
BIRADS 4	2064409	✓	0				
BIRADS 5	2064410	✓	0				
BIRADS 6	2064411	✓	0				

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	✓	10			
3 Months	2064398	✓	20			
6 Months	2064399	✓	30			
1 Year	2064400	✓	40			
1-2 Years	2064401	✓	50			
2 Years - Routine	2064402	✓	60			
Discontinue Screening	2064403	✓	70			
None	2064404	✓	80			

Export options: Excel | PDF | RTF

For the observation template:

For the task template:

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:

For the observation template:

Observation Type

Observation Name: Colonoscopy Report **Data Type:** Title **Managed List:** **Order:** 0 **Increment:**

CDS Criteria

Instruction/Note: **Question:**

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

System: **Code:** **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 ☐ Italics
- 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 ☐ Italics
- Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Disable Comment ☐ **Hide Observation Label** ☐ **Enable add-on usage** ☐ **Auto Invoke Drilldown** ☐ **Don't Display Value in History** ☐ **Allow Overflow** ☐

Validation: **Print Type:**

Mapped Display Field: **Allergy Classification:**

Calculation: **Parent Flag & ID:** **Use Privilege:** Public **Edit Privilege:** Public

User Defined Calculation Expression

Apply | Save ☐

Observation Type

Observation Name: Surgeon Completed **Data Type:** Provider **Managed List:** **Order:** 1 **Increment:**

CDS Criteria

Instruction/Note: **Question:**

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

System: **Code:** **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 ☐ Italics
- 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 ☐ Italics
- Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Disable Comment ☐ **Hide Observation Label** ☐ **Enable add-on usage** ☐ **Auto Invoke Drilldown** ☐ **Don't Display Value in History** ☐ **Allow Overflow** ☐

Validation: **Print Type:**

Mapped Display Field: **Allergy Classification:**

Calculation: **Parent Flag & ID:** **Use Privilege:** Public **Edit Privilege:** Public

User Defined Calculation Expression

Apply | Save ☐

Observation Type

Observation Name: Recommended Follow up **Data Type:** Dropdown **Managed List:** Follow up Colonoscopy **Order:** 5 **Increment:**

CDS Criteria

Instruction/Note: **Question:**

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

System: **Code:** **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 ☐ Italics
- 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 ☐ Italics
- Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16

Disable Comment ☐ **Hide Observation Label** ☐ **Enable add-on usage** ☐ **Auto Invoke Drilldown** ☐ **Don't Display Value in History** ☐ **Allow Overflow** ☐

Validation: **Print Type:**

Mapped Display Field: **Allergy Classification:**

Calculation: **Parent Flag & ID:** **Use Privilege:** Public **Edit Privilege:** Public

User Defined Calculation Expression

Apply | Save ☐

Observation Type

Observation Name		Data Type	Managed List	Order	Increment
Additional Notes		Test Box ⌄	⌄	10	

CDS Criteria

⌄ 🔍

Instruction/Note

Question

Units/Format	Display Range	Lower Range	Upper Range	Drilldown Template		Default Graph Template	
				⌄ 🔍		⌄	

System		Code			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 ☐ Italics
☐ 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 ☐ Italics
☐ Underline ☐ Red ☐ 12pt ☐ 10pt ☐ 8pt ☐ Courier ☐ Arial ☐ Bold, Red ☐ Bold, Red, 12pt ☐ Scalable-16   🗄

Disable Comment	Hide Observation Label	Enable add-on usage	Auto Invoke Drilldown	Don't Display Value in History	Allow Overflow
☐	☐	☐	☐	☐	☐

Validation	Print Type				
⌄	⌄				

Mapped Display Field	Allergy Classification				
⌄	⌄				

Calculation	Parent Flag & ID	Use Privilege	Edit Privilege		
⌄ ❓		Public ⌄	Public ⌄		

User Defined Calculation Expression ❓

Apply Save ☐

For the task template:

Sigmoidoscopy Results

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

For the Managed List:

For the observation template:

For the task template:

Task Template

Template Name
Sigmoidoscopy Results

Category*
Consult

Type

Description 🔓
Sigmoidoscopy

Reason

Note / Instructions

Progress Indicators

Assignee*
Assign to user

Start
when due

Due*
Today

Last Update: Stephanie Gosche

○ 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

22

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.
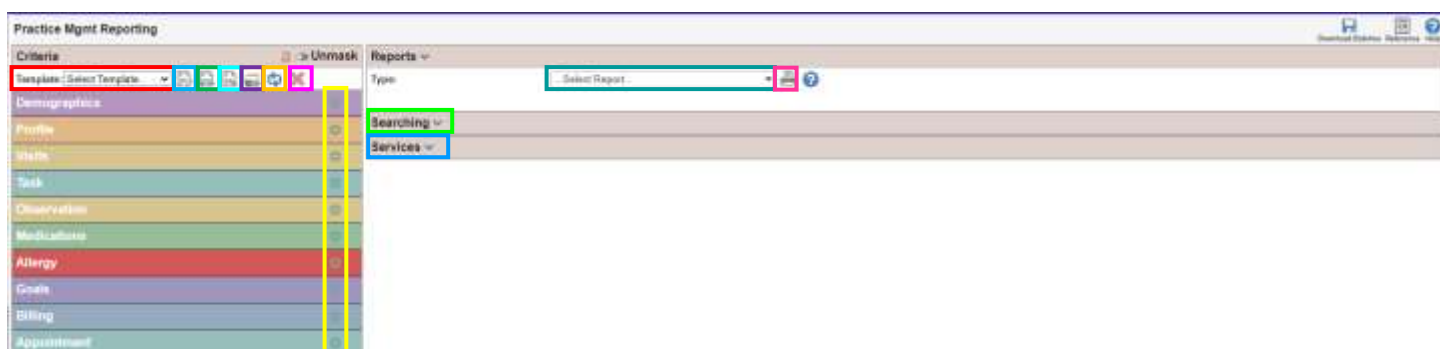
1. **Template dropdown:** select from a list of saved or system templates.
2. **Edit Template:** Edit current template criteria.
3. **Create a New Template From Existing**: Create a new saved template based on a selected template or using what you have selected in the categories below this field.
4. **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: 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. Absoulte 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.

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.

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   ⊕ ✕ ☑ not

Observation ⊕
- (☐last) | Conta ⌄ | Height | | 🔍 | > ⌄ | (1 | as | Number ⌄ |)

Date: 30-Apr-2003 📅 to 16-Nov-2023 📅

Observation   ⊕ ✕ ☑ not

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 ⊕ ✖ ☐ not

Observation ⊕
☐ 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 ⊕ ✖ ☐ not

Observation ⊕
☐ 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 ☑ not

Category	Surgical Hx ✖
or	Medical ✖

Description			
	TAH	Conta ✔	✖
or	Total Hysterectomy	Conta ✔	✖
or	Total Vaginal Hysterecto	Conta ✔	✖
or	Total Abdominal Hysteri	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 ⊕ ✖ ☑ not

Category ⊕		Surgical Hx ✖
	or	Medical ✖
		TAH	Conta ▾ ✖
	or	Total Hysterectomy	Conta ▾ ✖
Description ⊕	or	Total Abdominal Hystere	Conta ▾ ✖
	or	Total Vaginal Hysterecto	Whol ▾ ✖
	or	Complete Hysterectomy	Conta ▾ ✖

Visits ⊕

Task ⊕ ✖ ☑ not

Category ⊕		Lab
		DKML Cytology Gyneco	Conta ▾ ✖
	or	Gynecological Cytology	Exacl ▾ ✖
Description ⊕	or	Gynecological Cytology	Starts ▾ ✖
	or	, Gynecological Cytolog	Conta ▾ ✖
	or	, Gynecological Cytolog	Conta ▾ ✖
	or	Gynecological Cytology	Exacl ▾ ✖
Order Type		Result
Task Date		↓ 16-Nov-2020 to 29-Sep-2223
Obs. Date		15-Nov-2020 to 16-Nov-2023

Observation ⊕ ✖ ☑ not

Order Type		Result	
Observation ⊕			
(☐last)	Conta ▾	Pap Smear	▾ ✖
or (☐last)	Conta ▾	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	⊕ ✖ ☑ not
Category ⊕	Consult ▾ ✖
	or Investigation ▾ ✖
Description ⊕	Colonoscopy Cont: ▾
Order Type	Result ▾
Task Date	↓ 06-Jul-2013 📅 to 07-Jul-2023 📅
Obs. Date	07-Jul-2013 📅 to 07-Jul-2023 📅

Task	⊕ ✖ ☑ not
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	⊕ ✖ ☑ not
Category ⊕	Lab ▾
Description ⊕	Fecal Immunochemical Cont: ▾ ✖
	or FIT Cont: ▾ ✖
Order Type	Result ▾
Task Date	Back 📅 2 years ▾ Ahead None ▾
Obs. Date	07-Jul-2021 📅 to 07-Jul-2023 📅

Task	⊕ ✖ ☑ not
Category ⊕	Consult ▾ ✖
	or Investigation ▾ ✖
Description ⊕	sigmoidoscopy Cont: ▾
Order Type	Result ▾
Task Date	Back 📅 5 years ▾ Ahead None ▾
Obs. Date	07-Jul-2018 📅 to 07-Jul-2023 📅

Observation	⊕ ✖ ☑ not
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 ⊕ ✖ ☑ not

Category ⊕	Lab ∨
Description ⊕	Lipid Panel / Conta ∨ ✖
	or Cardiovascular Disease / Conta ∨ ✖
Order Type	Result ∨
Task Date	Back 📅 5 years ∨ Ahead All ∨
Obs. Date	16-Nov-2018 📅 to 16-Nov-2023 📅

Observation ⊕ ✖ ☑ not

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 ⊕ ✖ ☑ not

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   ➕ ✖ ☑ not

Category ➕	Lab ✔
Description ➕	Glucose, Fasting	Conta ✔ ✖
	or A1c	Conta ✔ ✖
Order Type	Result ✔
Task Date	Back 📅 5 years ✔ Ahead All ✔
Obs. Date	to 16-Nov-2023 📅

Observation   ➕ ✖ ☑ not

Order Type	Result ✔
Observation ➕	
(☐last) Conta ✔	Glucose, fasting		🔍	✔ ✖
or (☐last) Conta ✔	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 ☑ not

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 ☑ not

Category	Attachment
Type	Framingham
Task Date	5 years None
Obs. Date	17-Nov-2018 to 15-Nov-2023

Observation ☑ not

Category	All
Observation	

(last) Exact	Framingham CVD 10-ye	
or (last) Conta	cvr	
or (last) Conta	cv risk	
or (last) Conta	framingham	
or (last) Conta	frs	
or (last) Conta	cardiovascular risk	
or (last) Exact	10-Year Cardiovascular 65853-4	>= 1 as Number
Date	15-Nov-2018 to 15-Nov-2023	

Medications ☑ not

ATC Class	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	04-Dec-1945 to 15-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 Cancellatic ▾
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		⊕ ✕ ☐ 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		⊕ ✕ ☐ not
Type ⊕	All ▾	
Status ⊕	Exclude Cancellati ▾	
Date	↓ 14-May-2023 📅 to 16-Nov-2023 📅	

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

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

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

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

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

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

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

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

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 | Back: All | Ahead: All |

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 ⊕			
Diagnosis ⊕		Diabetes Mellitus	250	🔍 Cont: ▼	✖
	or	Essential Hypertension	401	🔍 Cont: ▼	✖
	or	Acute Myocardial Infarc	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 📅 All ▼   Ahead All ▼

Appointment   ⊕ ✖ ☐ not

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.**

DD) <mark>ESPCN – Quarterly QI – Patients with DM (Denominator)</mark>

Demographics

Status ⊕	Active
Primary Provider	Ahmed, Ghalib
Age Range	18 to

Profile ⊕

Visits ⊕

Task ⊕

Observation ⊕ ✖ ☐ not

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 ⊕ ✖ ☐ not

Diagnosis ⊕	Diabetes Mellitus	250	🔍	Starts
Bill Date	Back 🗓 All		Ahead None	

Appointment ⊕

EE) <mark>ESPCN - Quarterly - Patients with DM with A1c in last 6 months</mark>

Demographics

Status ⊕	Active
Primary Provider	Ahmed, Ghalib
Age Range	18 to

Profile ⊕

Visits ⊕

Task ⊕

Observation ⊕ ✖ ☐ not

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)	Exac	Glucose, fasting		🔍	>=		(7	as	Number) ✖
Date		19-Jun-2001 to 19-Jun-2025							

Observation ⊕ ✖ ☐ not

Category	Lab
Order Type	Result
Observation ⊕	

(☐last)	Exac	Hemoglobin A1c	4548-4	🔍	
Date		17-Dec-2024 to 19-Jun-2025			

Medications ⊕

Allergy ⊕

Goals ⊕

Billing ⊕ ✖ ☐ not

Diagnosis ⊕	Diabetes Mellitus	250	🔍	Starts
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 ⊕ ✖ ☐ not

Description ⊕		dfe	Conta ▼	✖
	or	dfa	Conta ▼	✖
	or	diabetic foot	Conta ▼	✖
	or	diabetes foot	Conta ▼	✖
	or	foot exam	Conta ▼	✖
	or	foot screen	Conta ▼	✖
	or	foot assessment	Conta ▼	✖
Task Date	Back 1 year ▼ Ahead None ▼			
Obs. Date	19-Jun-2024 to 19-Jun-2025			

Observation ⊕ ✖ ☐ not

Category	Lab ▼
Order Type	Result ▼

Observation ⊕

(☐last)	Exac ▼	Hemoglobin A1c	4548-4	>= ▼	(8.5	as	Number ▼	) ✖
or (☐last)	Exac ▼	Glucose Fasting	14771-0	>= ▼	(7	as	Number ▼	) ✖
or (☐last)	Conta ▼	Glucose, fasting		>= ▼	(7	as	Number ▼	) ✖
Date	19-Jun-2001 to 19-Jun-2025							

Medications ⊕

Allergy ⊕

Goals ⊕

Billing ⊕ ✖ ☐ not

Diagnosis ⊕	Diabetes Mellitus	250	Starts ▼
Bill Date ▼	Back All ▼ Ahead 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 ⊕

(☐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 ⊕ ✖ ☐ not

Category	Lab ▼
Order Type	Result ▼

Observation ⊕

(☐last)	Cont: ▼	A1c	🔍	> ▼	(8.5	as	Number ▼	)

Date: 19-Jun-2024

Medications	⊕

Allergy	⊕

Goals	⊕

Billing ⊕ ✖ ☐ not

Diagnosis ⊕	Diabetes Mellitus	250 🔍	Starts ▼
Bill Date ▼	Back 🗓	All ▼	Ahead None ▼

Appointment	⊕

48

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 — not

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 — not

Category	Lab
Order Type	Result

Observation
- (☐last) Cont: A1c | |

Date: 20-Jun-2024

Medications

Allergy

Goals

Billing — not

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 — not

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 — not

Category	Visit

Observation
- (☐last) Exact BP systolic | | >= | 130 | as Number)

Date: 13-Jun-2024

Medications

Allergy

Goals

Billing — not

Diagnosis	essential hypertension*	401	Starts
Bill Date	Back	All	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 ⊕ ✖ ☐ not

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 ⊕ ✖ ☐ not

Category	Visit ⌄						
Observation ⊕							
(☐last)	Exact ⌄	BP systolic		> ⌄	1	as Number ⌄	) ✖
or (☐last)	Exact ⌄	BP diastolic		> ⌄	1	as Number ⌄	) ✖
Date	13-Jun-2024						

Medications ⊕

Allergy ⊕

Goals

Billing ⊕ ☐ not

Diagnosis ⊕	essential hypertension* 401	Starts ⌄
Bill Date ⌄	All ⌄	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
(last) Exact : BP systolic   >=   130   as Number)
or (last) Exact : BP diastolic   >=   80   as Number)
Date: 28-May-1909 to 13-Jun-2025

Observation — not

Category: Visit
Observation
(last) Exact : BP systolic   >   1   as Number)
or (last) Exact : BP diastolic   >   1   as Number)
Date: 14-Dec-2024

Medications

Allergy

Goals

Billing — not

Diagnosis: essential hypertension* 401   Starts
Bill Date : All   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
(last) Exact : BP systolic   >=   130   as Number)
or (last) 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 : All   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 69

Profile ⊕ ✖ ☑ not

Category ⊕	Medical ✖
	or Surgical Hx ✖
Description ⊕	TAH — Contains ✖
or	Total Hysterectomy — Contains ✖
or	Total Abdominal Hystere — Contains ✖
or	Total Vaginal Hysterecto — Contains ✖
or	Complete Hysterectomy — Contains ✖

Visits ⊕

Task ⊕ ✖ ☑ not

Category ⊕	Lab
Description ⊕	Gynecological Cytology — Starts ✖
or	Gynecological Cytology — Exact ✖
or	, Gynecological Cytolog — Contains ✖
or	, Gynecological Cytolog — Contains ✖
or	DKML Cytology Gyneco — Contains ✖
Order Type	Result
Task Date	↓ 20-Jun-2022 to 19-Jun-2025
Obs. Date	20-Jun-2022 to 19-Jun-2025

Task ⊕ ✖ ☑ not

Category ⊕	Patient followup
Type ⊕	Adults- No Appt in ✖
	or No Appt in 3 Years ✖
Task Date	↓ 18-Mar-2025 to 19-Jun-2025

Observation ⊕ ✖ ☑ not

Order Type	Result
Observation ⊕	
(☐last) Contains ⌄	Gynecological Cytology 47527-7
Date	20-Jun-2022 to 19-Jun-2025

Medications ⊕

Allergy ⊕

Goals ⊕

Billing ⊕

Appointment ⊕ ✖ ☑ not

Status ⊕	Exclude Cancellati
Date	Back None	Ahead 3 months

Appointment ⊕ ✖ ☑ not

Type ⊕	All
Concern	Starts v
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 ⊕ ✖ ☑ not

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 ⊕ ✖ ☑ not

Category ⊕	Investigation
Description ⊕	mammo Conta
Order Type	Result
Task Date	↓ 20-Jun-2023 to 19-Jun-2025
Obs. Date	20-Jun-2023 to 19-Jun-2025

Task ⊕ ✖ ☑ not

Category ⊕	Patient followup
Type ⊕	Adults- No Appt in ✖ or No Appt in 3 Years ✖
Task Date	↓ 19-Jun-2025

Observation ⊕

Medications ⊕

Allergy ⊕

Goals ⊕

Billing ⊕

Appointment ⊕ ✖ ☑ not

Status ⊕	Exclude Cancellatio
Date	↓ 19-Jun-2025 to 20-Sep-2025

Appointment ⊕ ✖ ☑ not

Type ⊕	All
Concern	Starts v
Time Type ⊕	All
Minimum Duration	0 min
Requested By	
Status ⊕	Exclude Cancellatio
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 – 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 ⊕ ✕ ☑ not

Category ⊕	Consult ✕
	or Investigation ✕
Description ⊕	Colonoscopy Cont: ▾
Order Type	Result
Task Date	↓ 20-Jun-2015 to 19-Jun-2025
Obs. Date	20-Jun-2015 to 19-Jun-2025

Task ⊕ ✕ ☑ not

Category ⊕	Lab
Description ⊕	Fecal Immunochemical Cont: ▾ ✕
	or FIT Cont: ▾ ✕
Order Type	Result
Task Date	↓ 20-Jun-2023 to 19-Jun-2025
Obs. Date	20-Jun-2023 to 19-Jun-2025

Task ⊕ ✕ ☑ not

Category ⊕	Investigation ✕
	or Consult ✕
Description ⊕	Sigmoidoscopy Cont: ▾
Order Type	Result
Task Date	↓ 20-Jun-2020 to 19-Jun-2025
Obs. Date	19-Jun-2020 to 19-Jun-2025

Task ⊕ ✕ ☑ not

Category ⊕	Patient followup
Type ⊕	Adults- No Appt in ▾ ✕
	or No Appt in 3 Years ▾ ✕
Task Date	↓ 18-Mar-2025 to 19-Jun-2025

Observation ⊕ ✕ ☑ not

Order Type	Result
Observation ⊕	
(☐last) Exac ▾ Fecal Immunochemical 29771-3 🔍 ▾	
Date	20-Jun-2023 to 19-Jun-2025

Medications ⊕

Allergy ⊕

Goals

Billing ⊕

Appointment ⊕ ✕ ☑ not

Status ⊕	Exclude Cancellati ▾
Date	↓ 19-Jun-2025 to 20-Sep-2025

Appointment ⊕ ✕ ☑ not

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 ⊕ ✖ ☑ not

Category ⊕	Lab ▼	
	Glucose, Fasting	Conta ▼ ✖
Description ⊕	or A1c	Conta ▼ ✖
	or Diabetes Screening Res	Conta ▼ ✖
Order Type	Result ▼	
Task Date	↓ 20-Jun-2020 ▦ to 19-Jun-2025 ▦	
Obs. Date	19-Jun-2020 ▦ to 19-Jun-2025 ▦	

Task ⊕ ✖ ☑ not

Category ⊕	Patient followup ▼
	Adults- No Appt in ▼ ✖
Type ⊕	or No Appt in 3 Years ▼ ✖
Task Date	↓ 19-Jun-2025 ▦

Observation ⊕ ✖ ☑ not

Order Type	Result ▼	
Observation ⊕		
(☐last) Conta ▼	Glucose Fasting	14771-0 🔍 ▼ ✖
or (☐last) Conta ▼	Hemoglobin A1c	4548-4 🔍 ▼ ✖
Date	19-Jun-2020 ▦ to 19-Jun-2025 ▦	

Medications ⊕

Allergy ⊕

Goals ⊕

Billing ⊕

Appointment ⊕ ✖ ☑ not

Status ⊕	Exclude Cancellati ▼
Date	↓ 19-Jun-2025 ▦ to 20-Sep-2025 ▦

Appointment ⊕ ✖ ☑ not

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 ⊕ ✖ ☑ not

Category ⊕	Lab ▾		
Description ⊕	Lipid	Conta ▾	✖
	or Cardiovascular Disease	Conta ▾	✖
Order Type	Result ▾		
Task Date	↓ 20-Jun-2020 📅 to 19-Jun-2025 📅		
Obs. Date	19-Jun-2020 📅 to 19-Jun-2025 📅		

Task ⊕ ✖ ☑ not

Category ⊕	Patient followup ▾	
Type ⊕	Adults- No Appt in ▾	✖
	or No Appt in 3 Years ▾	✖
Task Date	↓ 19-Jun-2025 📅	

Observation ⊕ ✖ ☑ not

Category	Lab ▾				
Order Type	Result ▾				
Observation ⊕					
(☐last)	Exac ▾	Cholesterol	14647-2	▾	✖
or (☐last)	Exac ▾	HDL Cholesterol	14646-4	▾	✖
or (☐last)	Exac ▾	LDL Cholesterol	39469-2	▾	✖
Date	19-Jun-2020 📅 to 19-Jun-2025 📅				

Medications ⊕ ✖ ☑ not

ATC Class ⊕	HMG COA REDUCTAS C10AA
Active Status	Active Only ▾
Start Date	20-Jun-1951 📅 to 19-Jun-2025 📅

Medications ⊕ ✖ ☑ not

	crestor		Contains ▾	▾ ✖
	or lipitor		Contains ▾	▾ ✖
	or pravachol		Contains ▾	▾ ✖
Drug Name ⊕	or zocor		Contains ▾	▾ ✖
	or atorvastatin		Contains ▾	▾ ✖
	or rosuvastatin		Contains ▾	▾ ✖
	or simvastatin		Contains ▾	▾ ✖
	or pravastatin		Contains ▾	▾ ✖
Active Status	Active Only ▾			
Start Date	20-Jun-1951 📅 to 19-Jun-2025 📅			

Allergy ⊕

Goals ⊕

Billing ⊕

Appointment ⊕ ✖ ☑ not

Status ⊕	Exclude Cancellati ▾
Date	↓ 19-Jun-2025 📅 to 20-Sep-2025 📅

Appointment ⊕ ✖ ☑ not

Status ⊕	Exclude Cancellati ▾
Provider or Resource	Ahmed, Ghalib ▾
Date	Back 📅 1 year ▾ Ahead None ▾

Lipid (contains)
Cardiovascular Disease Risk Assessment (contains)

v

**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

**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

**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 ⌄ Atend None ⌄

Appointment	➕ ✕ ☑ not
Status ➕	Exclude Cancellati ⌄
Provider or Resource	All ⌄
Date	Back 📅 None ⌄ Atend 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**

Billing — ☐ not

Diagnosis			
	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 ▾

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 ⊕

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

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

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

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	Back 📅 6 days ▾ Ahead 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 to

Profile	⊕

Visits	⊕

Task	⊕ ✕ ☐ not
Category ⊕	Patient followup ▾
Type ⊕	75+ ▾
Task Date	Back 📅 6 days ▾ Ahead 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	⊕ ✖ ☐ not
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.

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.

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.

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

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Below is how to set up the widgets.

Quarterly Reporting – Q1 - Lifestyle Widget

Quarterly Reporting – Q1 – Vitals Widget

Quarterly Reporting – Q1 – CV Risk Screening Widget

Quarterly Reporting – Q1/Q3 - Pap Widget

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

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Quarterly Reporting – Q2/Q4 - Panel by Age Widget   **Quarterly Reporting – Q2/Q4 - Panel by Gender 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

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 Gende
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

Weekly Tracking – For Tracking Sheet Widget

Third Next Available Widget *for how to create the filter, go to* [*Creating a Third Next Available Filter*](Creating%20a%20Third%20Next%20Available%20Filter).

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 - N◖
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	Violet ▾ ▦
Height	Fit all content ▾
Width	Small (33%) ▾

Save Item   Cancel

75+ Outreach Widget

Population Outreach - 75+, No Appt in 1 Yea

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
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	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 - C◖
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	Violet ▾ ▦
Height	Fit all content ▾
Width	Small (33%) ▾

Save Item   Cancel

Screening Outreach Widget *(one per Dr.)*

Screening Outreach - Dr. Ahmed ✕

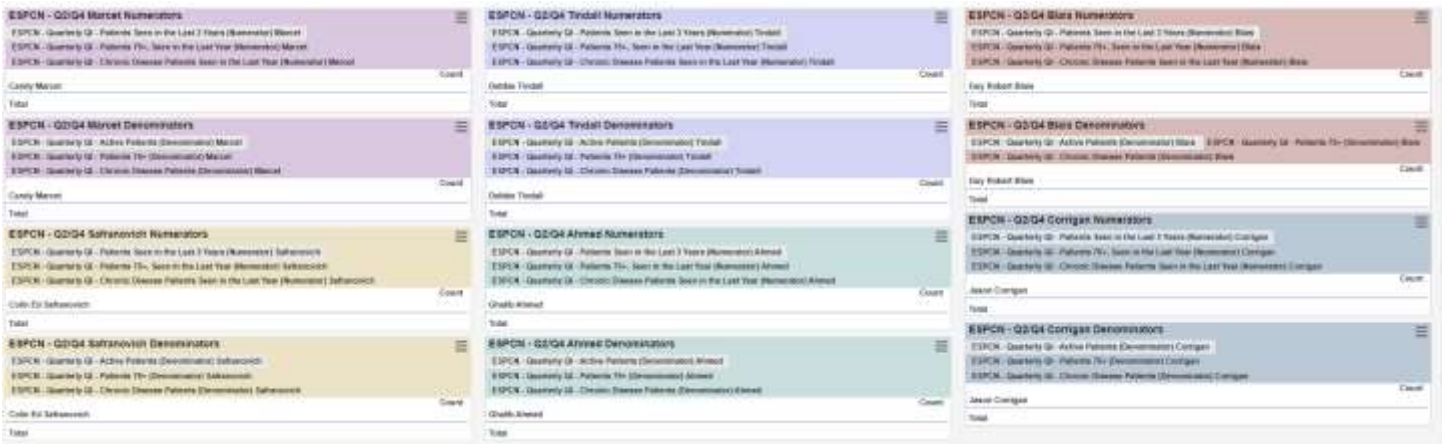|	
Context	Reporting ▾
Type	Statistics ▾
Filters	-- Add -- ▾

✕ 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
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	Goal Violet ▾ ▦
Height	Fit all content ▾
Width	Small (33%) ▾

Save Item   Cancel

Quarterly QI Dashboard

Each physician will require a numerator and denominator widget.

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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

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.

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):

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

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

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.

Or

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.

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

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**.**

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