Med Access PCCA Setup

Updated October 2024

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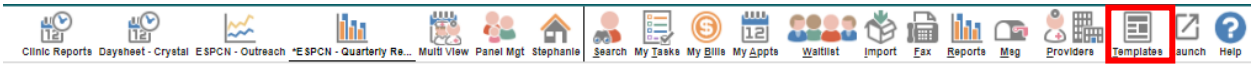
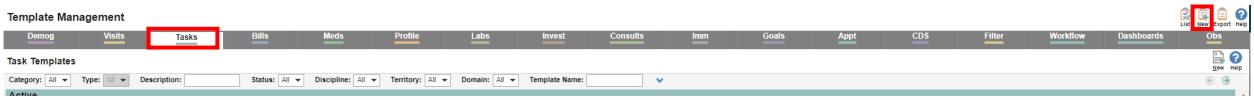
BUILDING TASK TEMPLATES

Access the Templates menu to open the Template Management Menu.

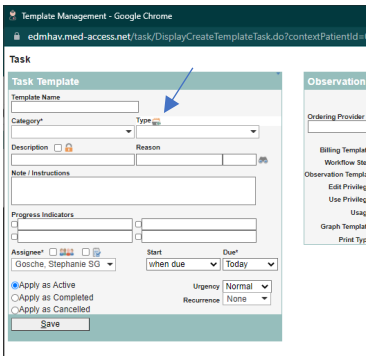


Go to the Tasks tab and select New.

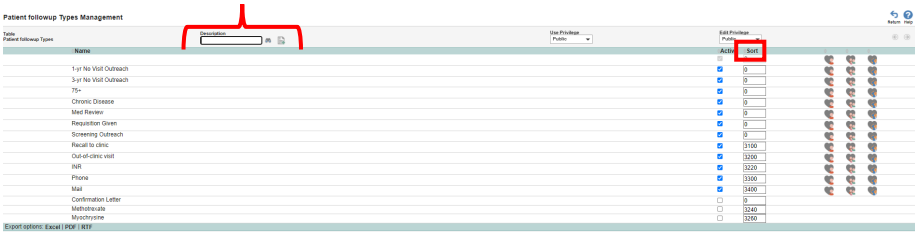


You will need to create a few tasks.

There is a button you can click on if you hover your 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.

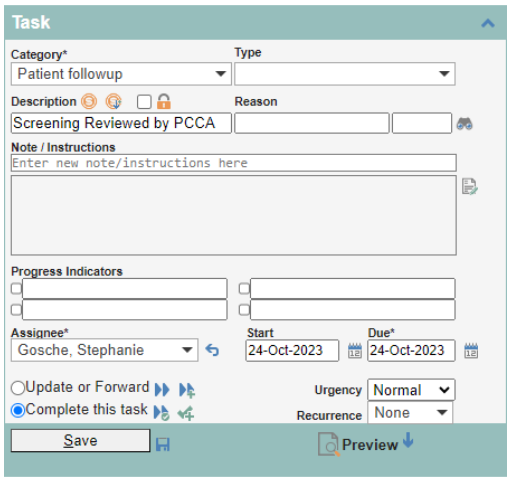


To add in the new task types, click on the description line and enter the name you would like to add. Then click the add button. Add in each additional task type. If you would like to change the order that they appear in the list, change the sort number. The lower the number, the higher in the list it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



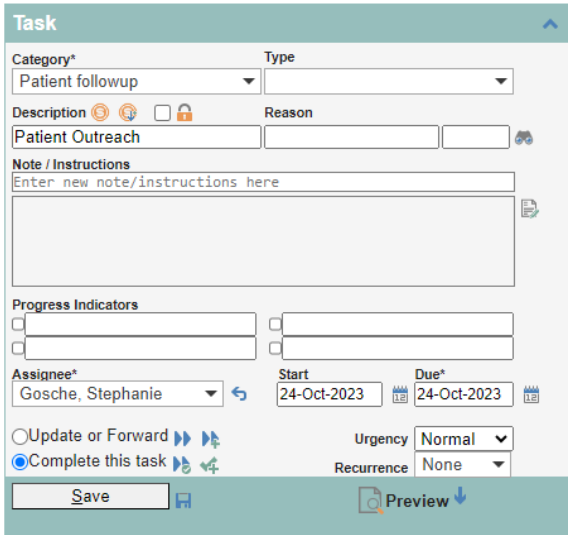
Screening Reviewed by PCCA

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.



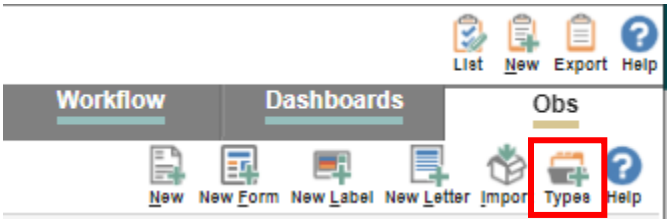
You also need to create task types for adding in results found on Netcare. There are a few steps required to create these task templates. If the clinic is okay with the PCCA importing Mammograms, Colonoscopies and Sigmoidoscopies into the EMR then you do not need to create those additional task templates.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

Adding Result Tasks to Med Access

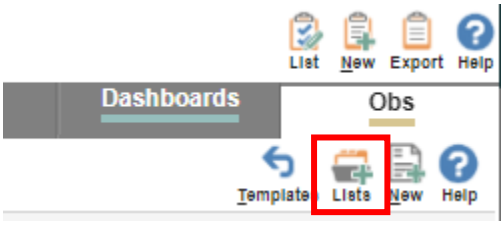
1. Create observations. The observations need to be named the same as what you are trying to capture if the results came in directly to the clinic via e-delivery or the clinics import processes.
2. Create a task template that uses the observations you created.
3. Use a test patient to confirm that the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

FIT Test Results

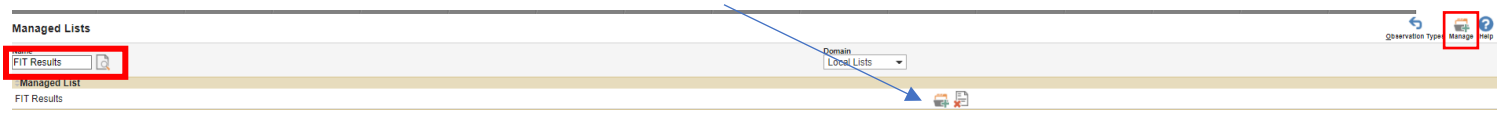
While in the template menu go into Observations (Obs). Select Types so you can create the dropdown results for your lab.



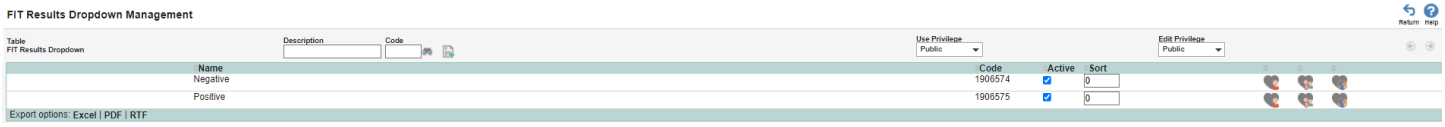
Then select Lists.



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.



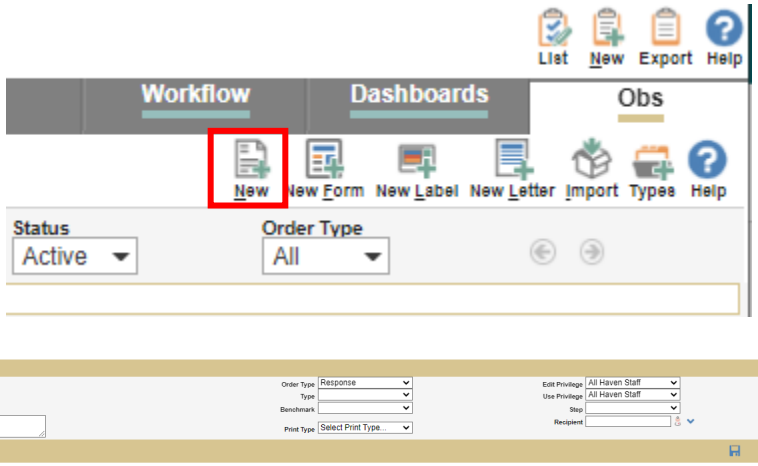
Once completed, select the return button

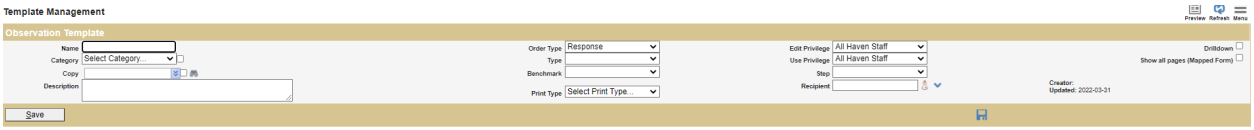
, Observation Types

, 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

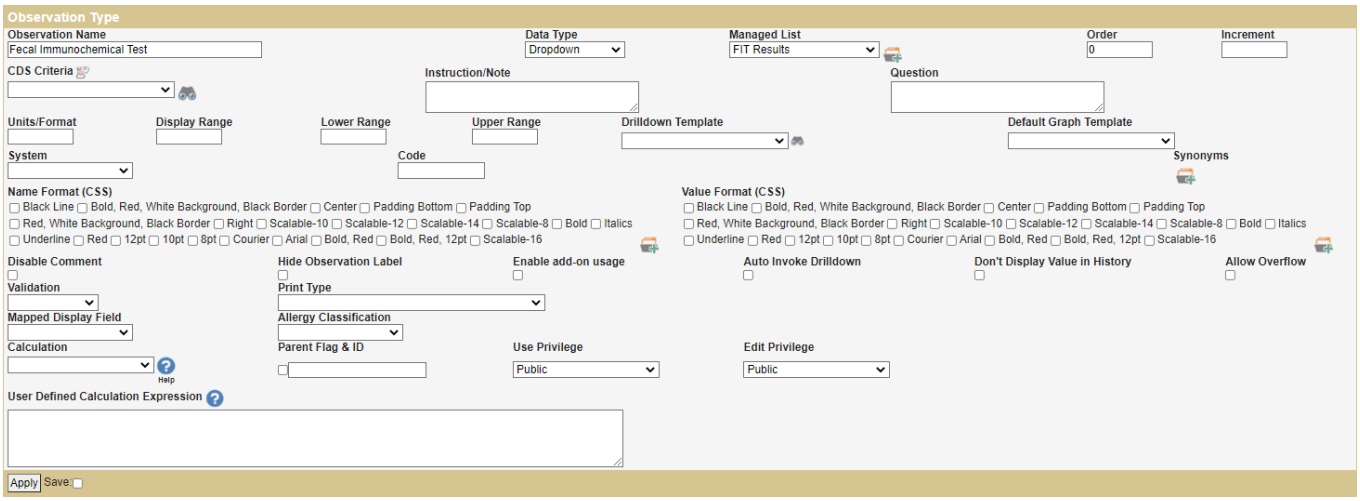
Description: Fecal Immunochemical Test Results

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

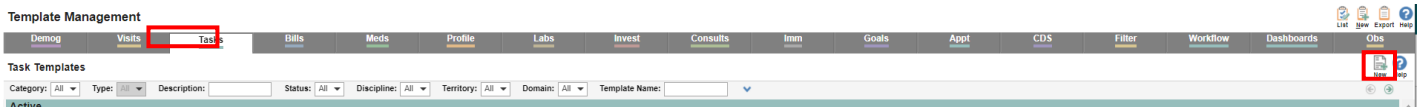
Data Type: Dropdown

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

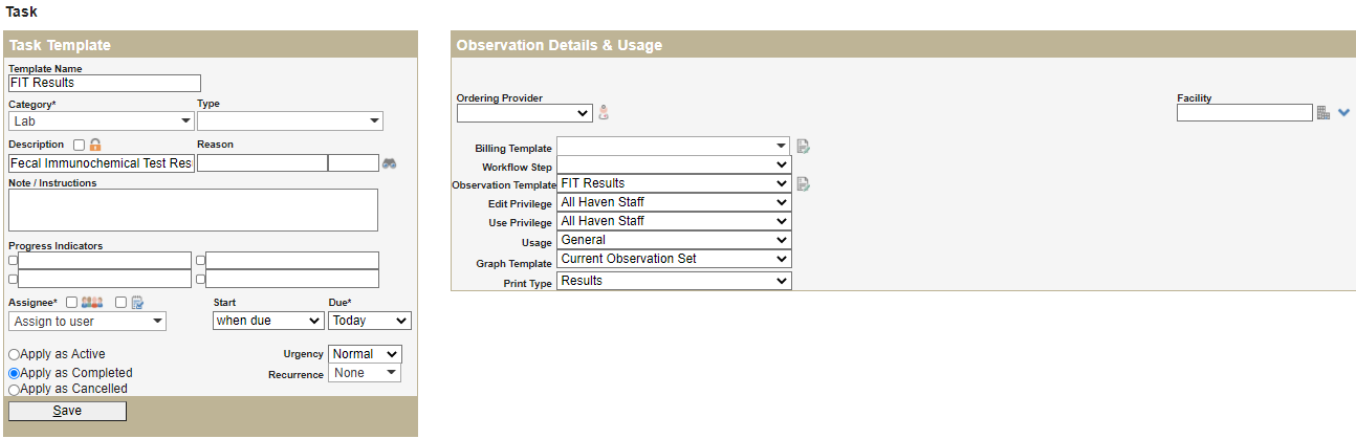
Then click apply.

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

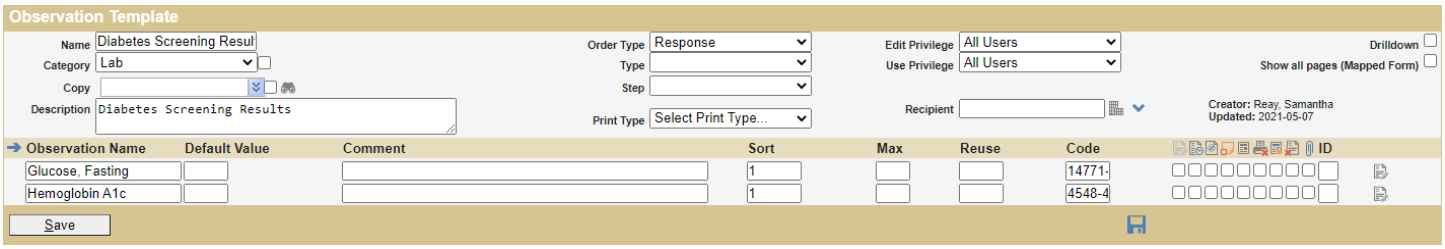
Observation Template (right side): FIT Results

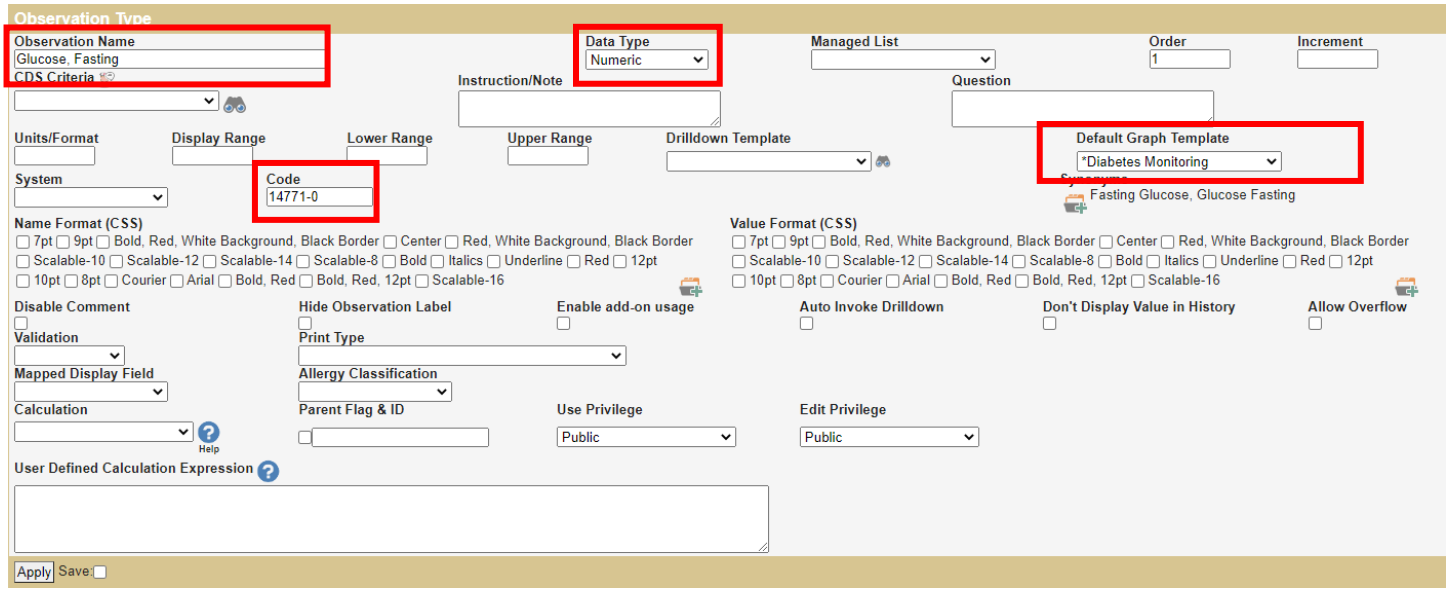
Print Type (right side): Results

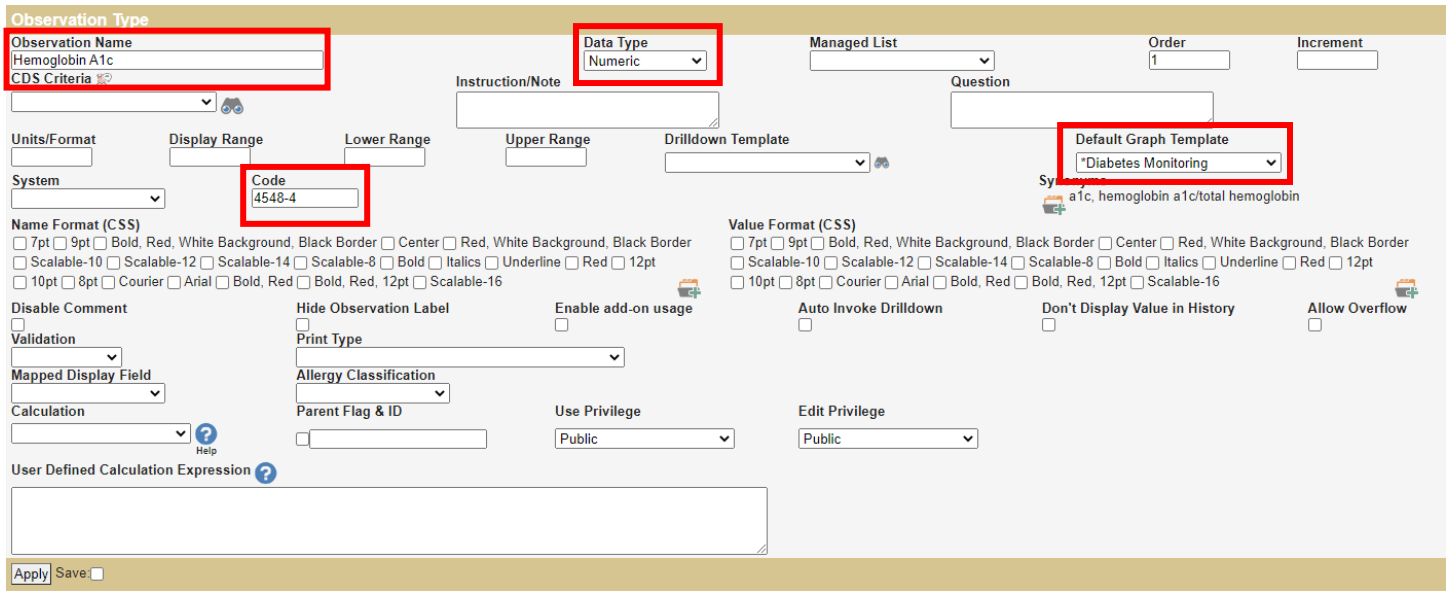
Then click save. Your task template is now complete. It will need to be marked as a favourite for the PCCA once their Med Access is set up.

Diabetes Screening Results

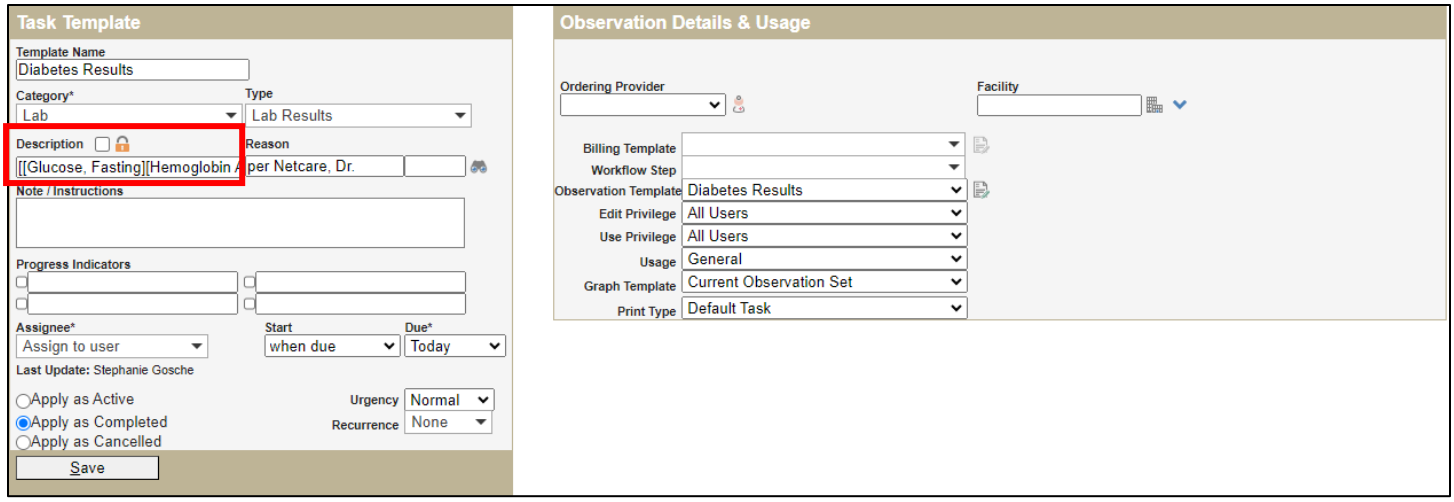
For the observations:







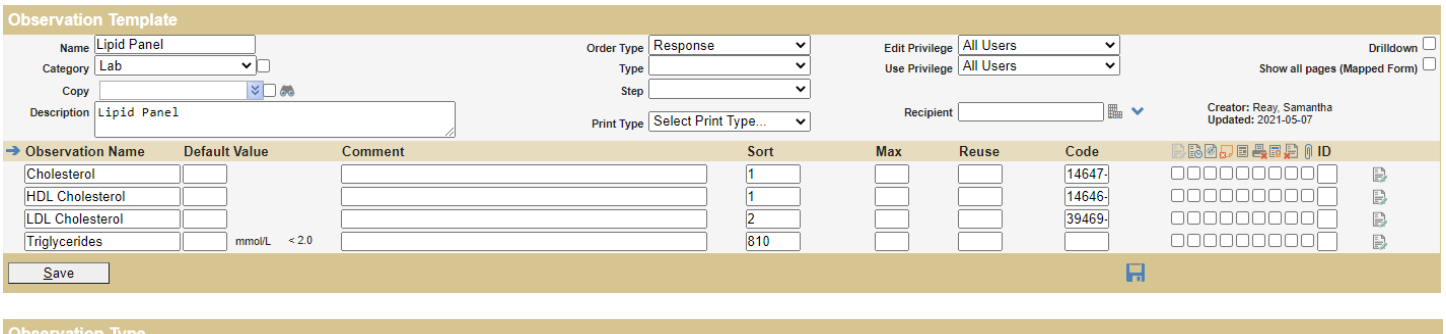
For the task template:

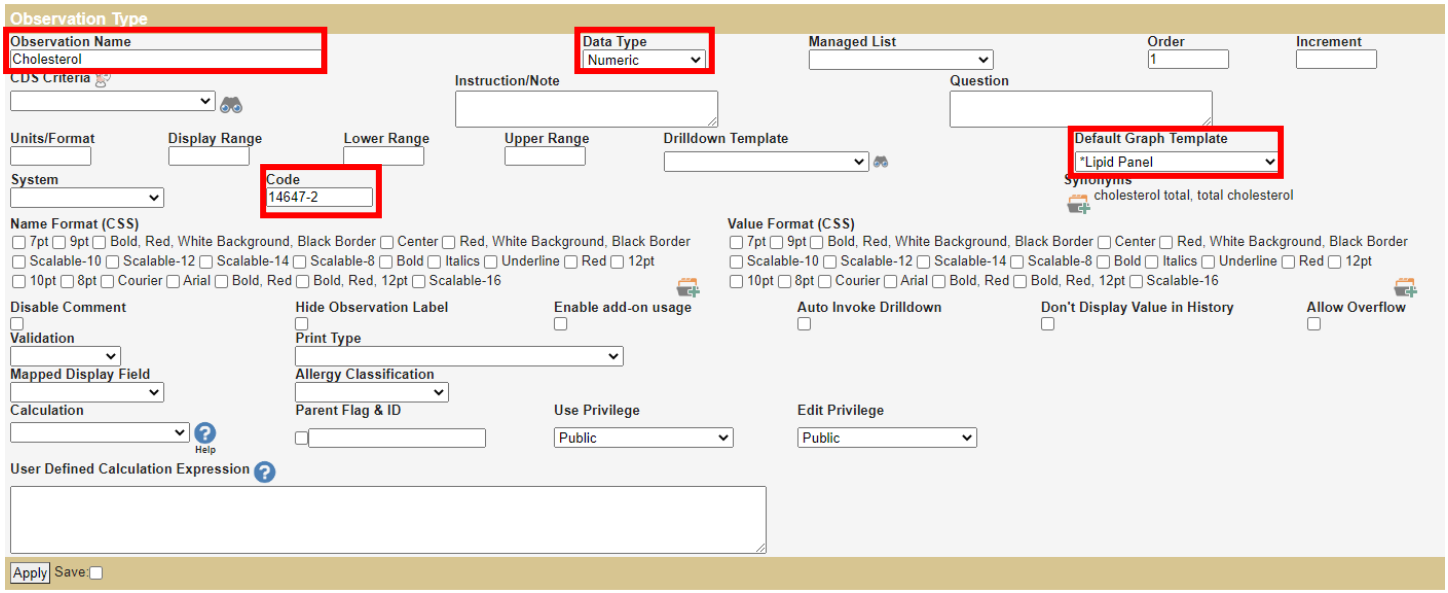


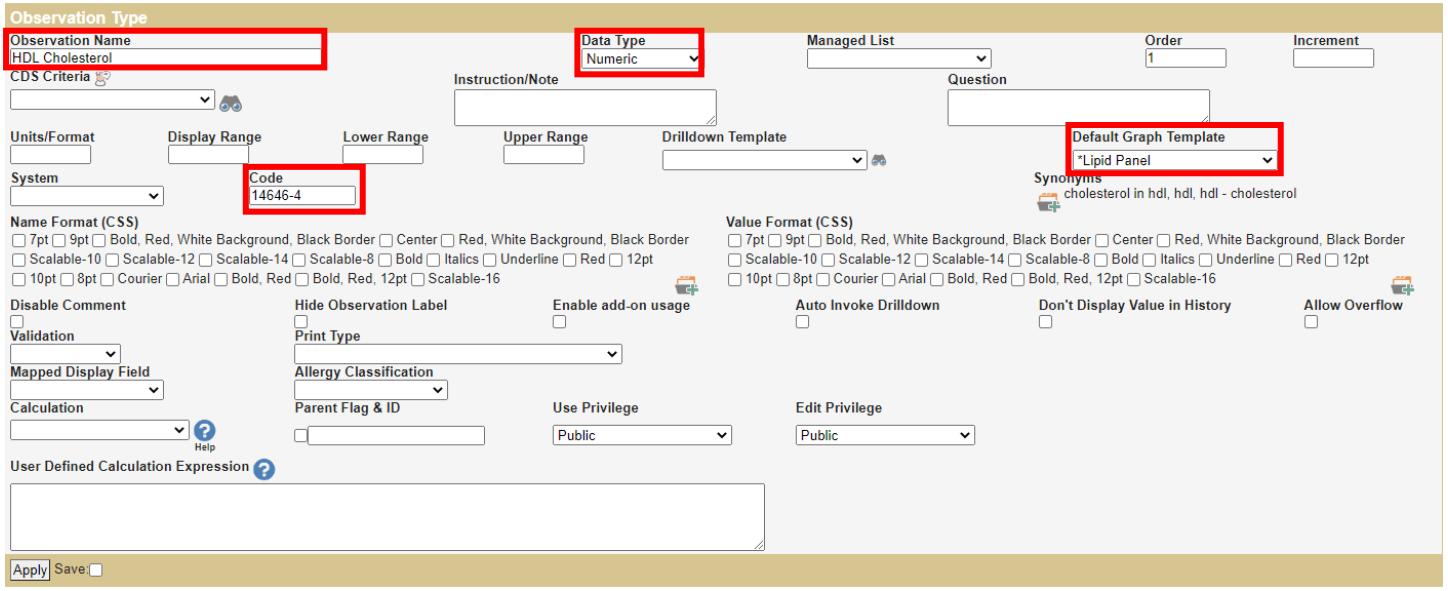
Description is a multi-select macro: [[Glucose, Fasting][Hemoglobin A1c][Glucose, Fasting & Hemoglobin A1c]]

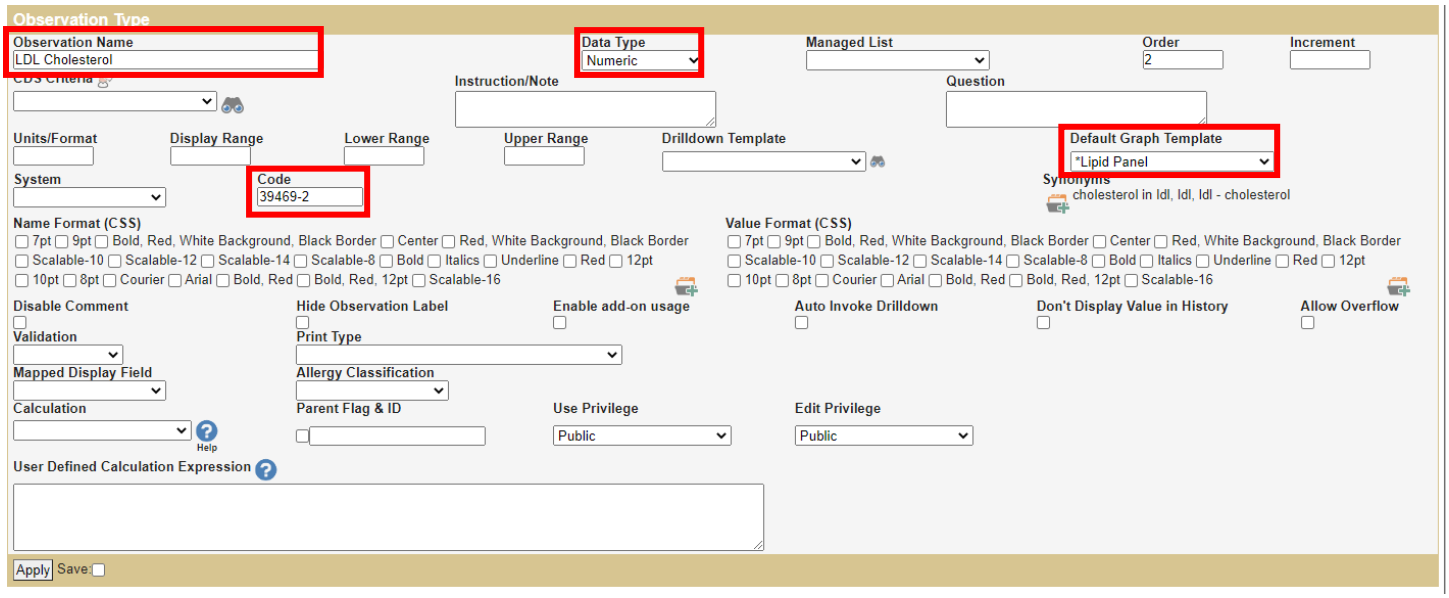
Lipid Screening

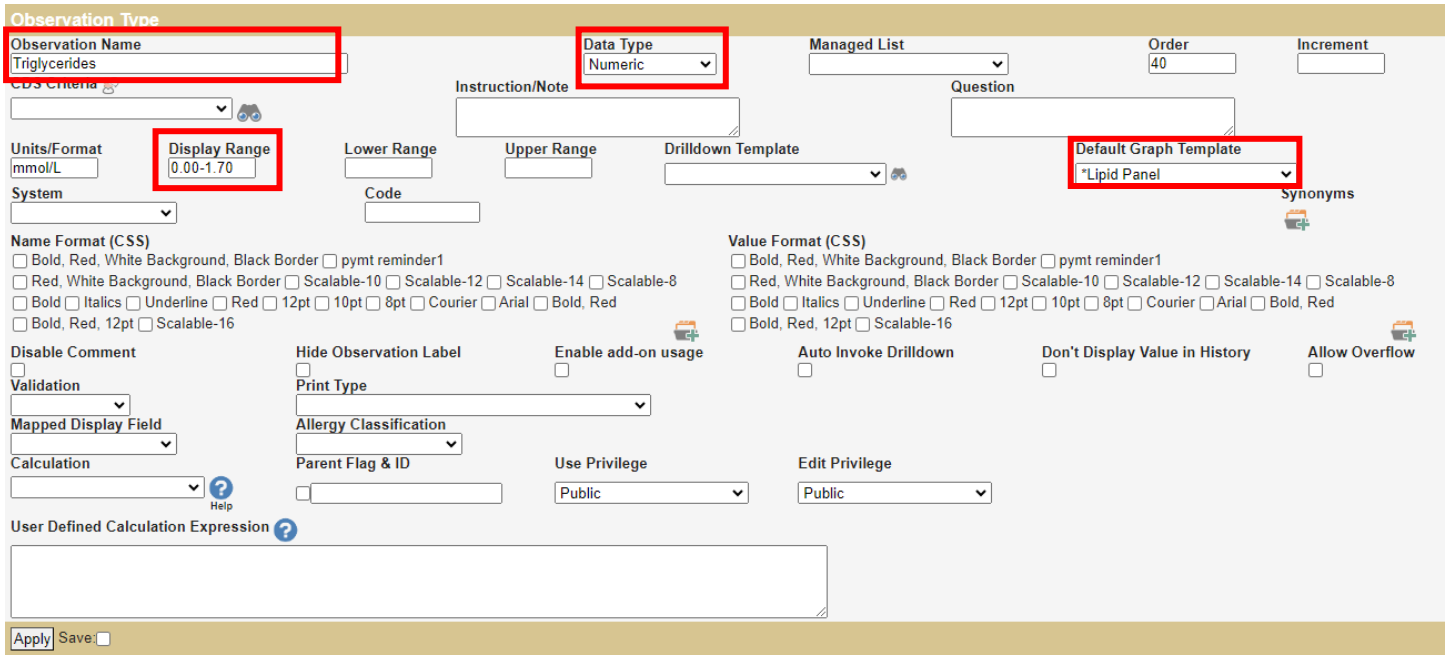
For the observations:



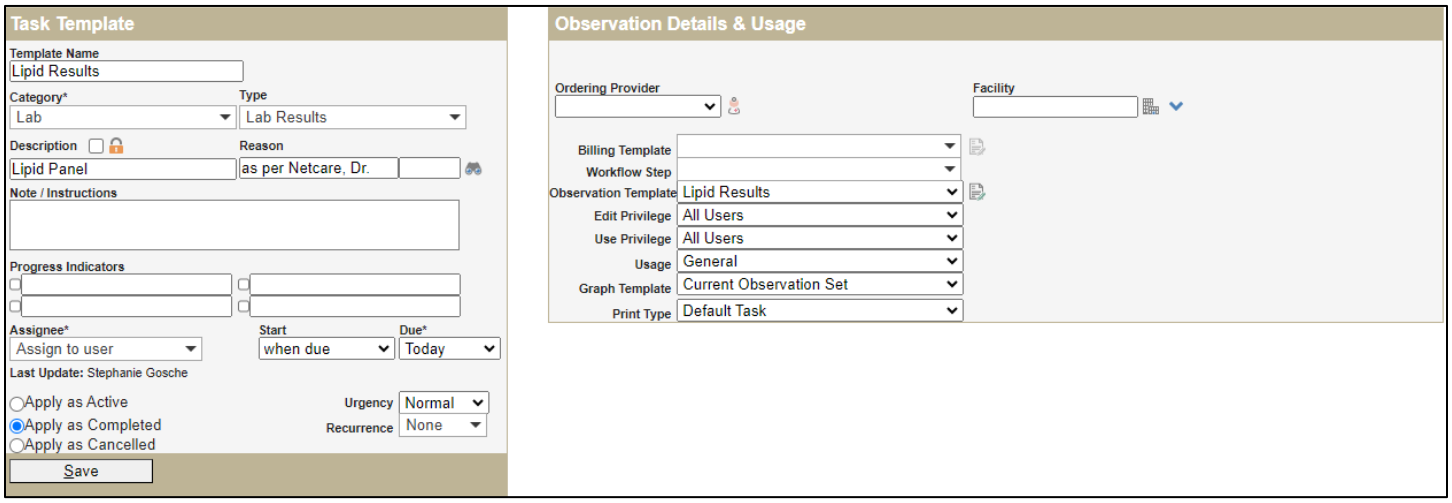



Observation Type
Observation Name
HDL Cholesterol
Data Type
Numeric
Managed List
Order
1
Increment
CDS Criteria
Instruction/Note
Question
Units/Format
Display Range
Lower Range
Upper Range
Drilldown Template
Default Graph Template
*Lipid Panel
System
Code
14646-4
Synonyms
cholesterol in hdl, hdl, hdl - 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
Public
Edit Privilege
Public
Help
User Defined Calculation Expression
Apply
Save:


Observation Type
Observation Name
LDL Cholesterol
Data Type
Numeric
Managed List
Order
2
Increment
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
Public
Edit Privilege
Public
Help
User Defined Calculation Expression
Apply
Save:


Observation Type
Observation Name
Triglycerides
Data Type
Numeric
Managed List
Order
40
Increment
Instruction/Note
Question
Units/Format
mmol/L
Display Range
0.00-1.70
Lower Range
Upper Range
Drilldown Template
Default Graph Template
*Lipid Panel
System
Code
Synonyms
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
Public
Edit Privilege
Public
Help
User Defined Calculation Expression
Apply
Save:

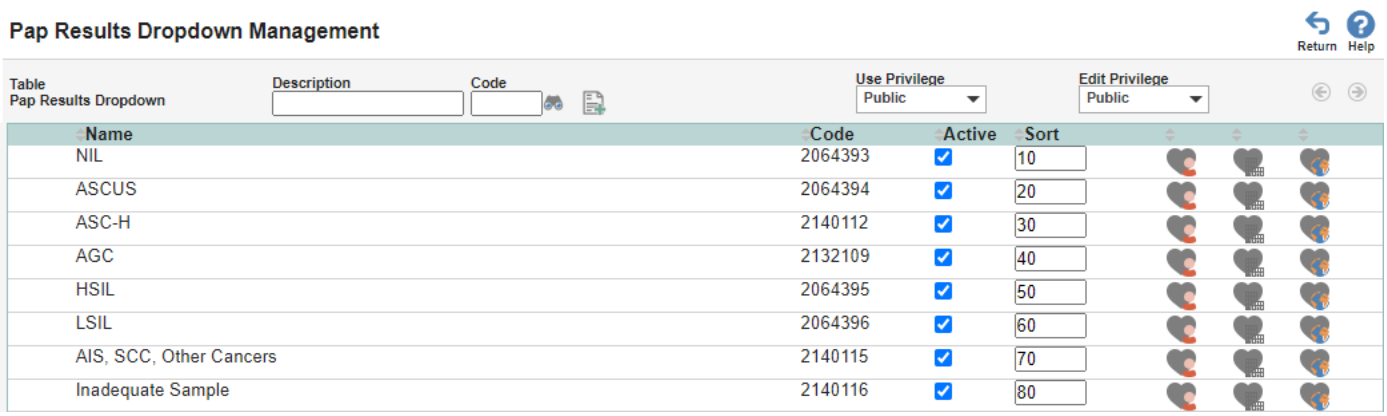
For the task template:



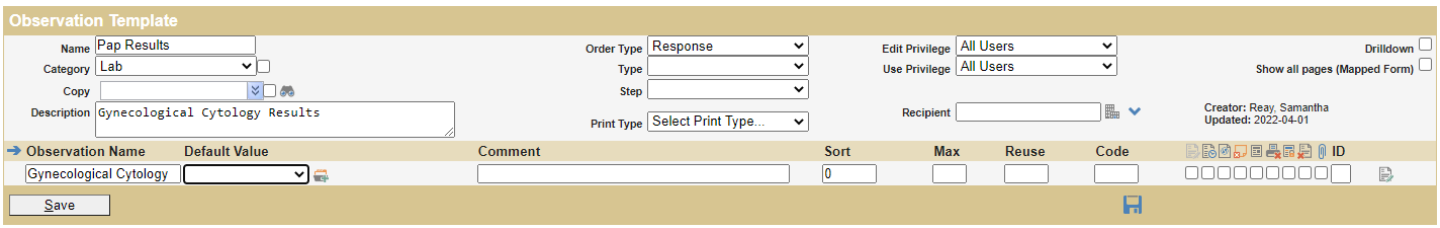
Pap Test Results

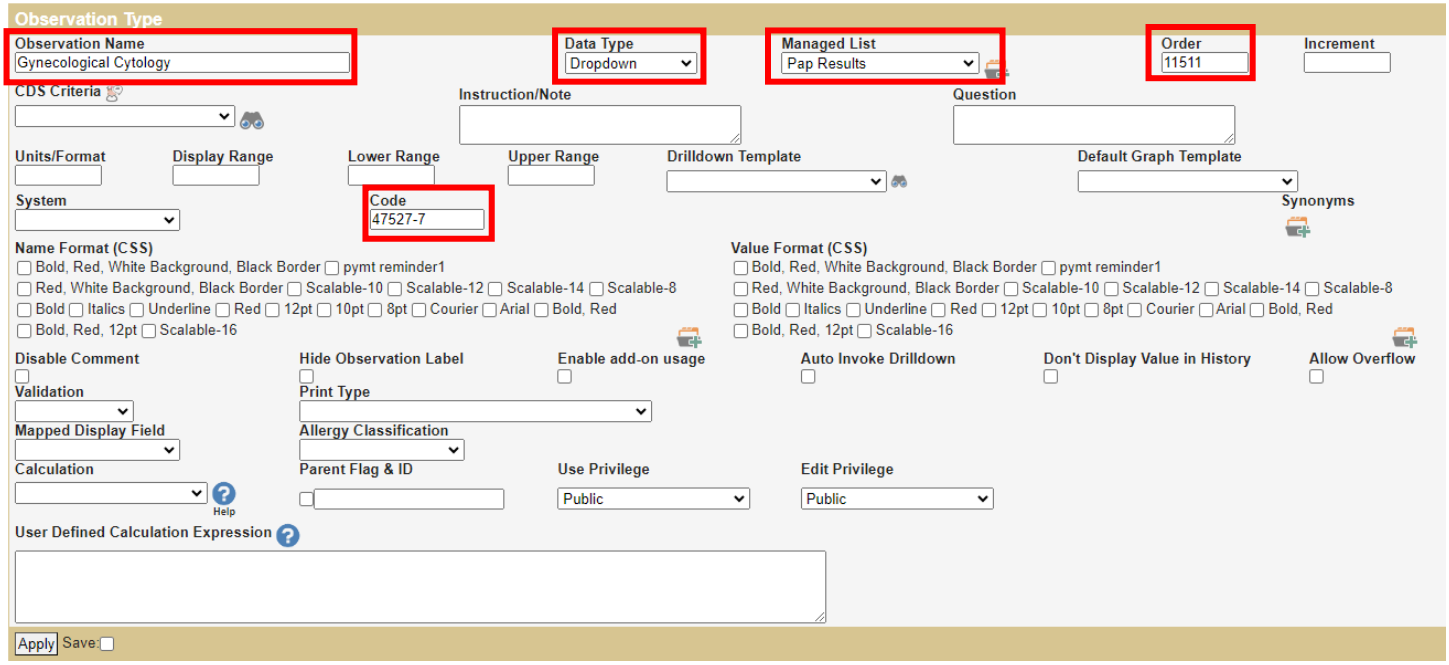
For the observations:

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

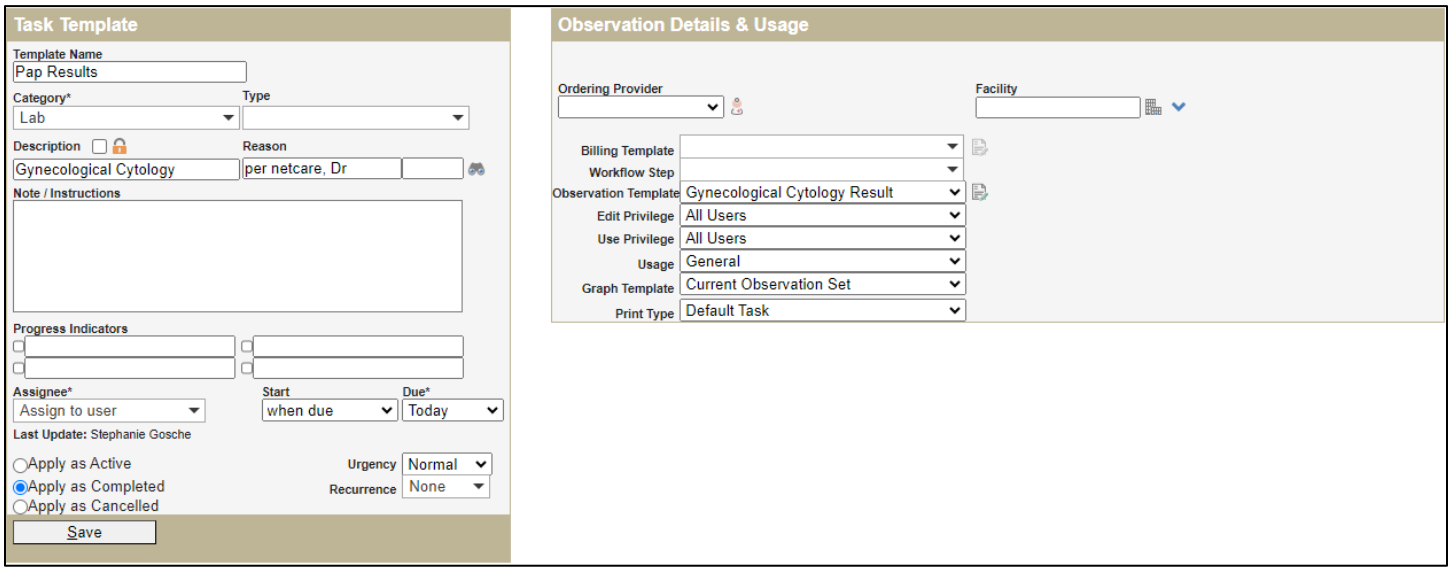


For the observation template:





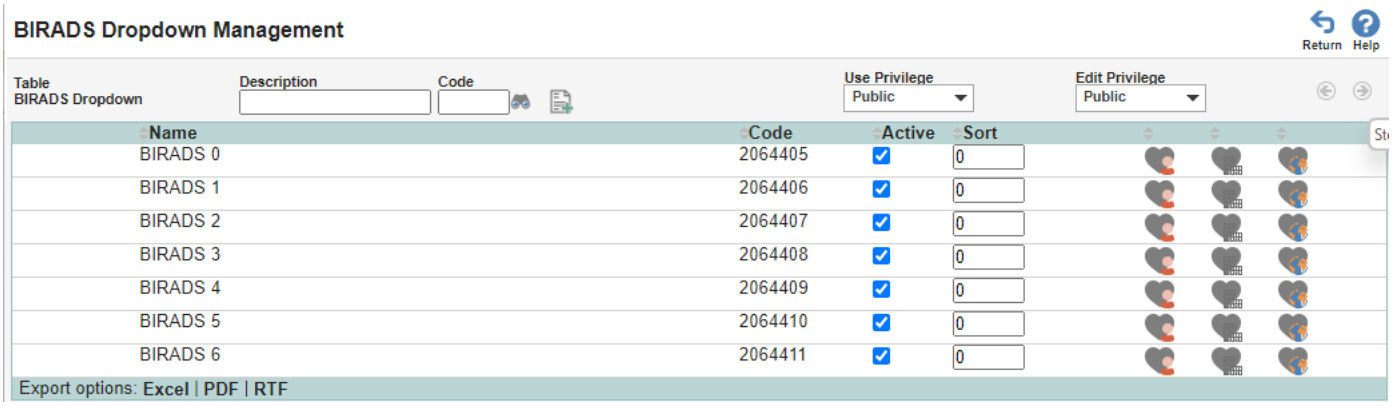
For the task template:



Mammogram Results

For the observations:

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



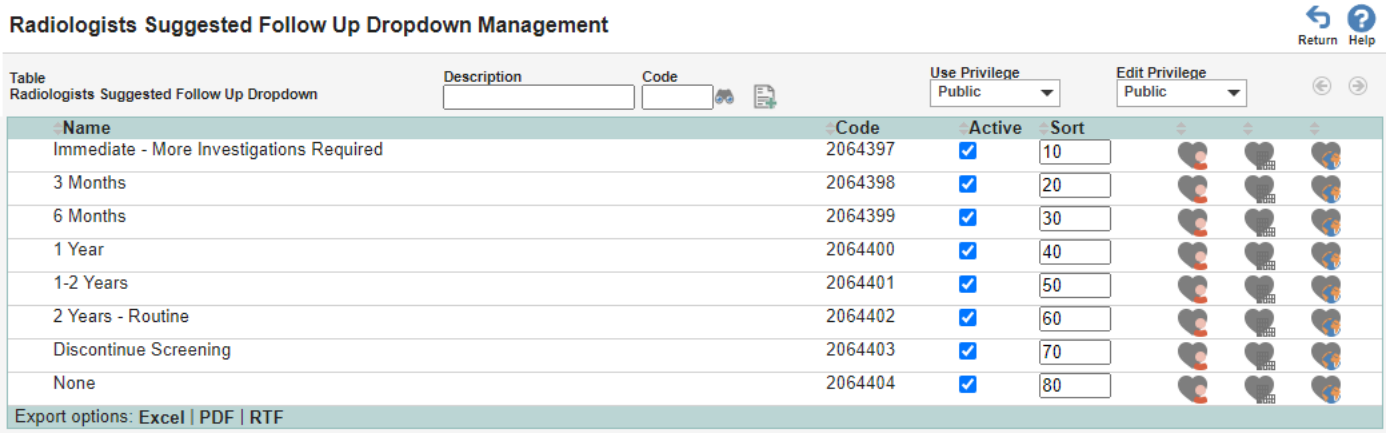
BIRADS Dropdown Management

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

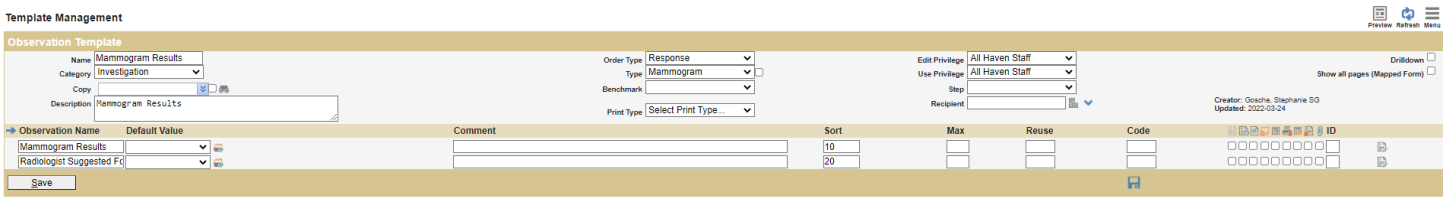
Return Help

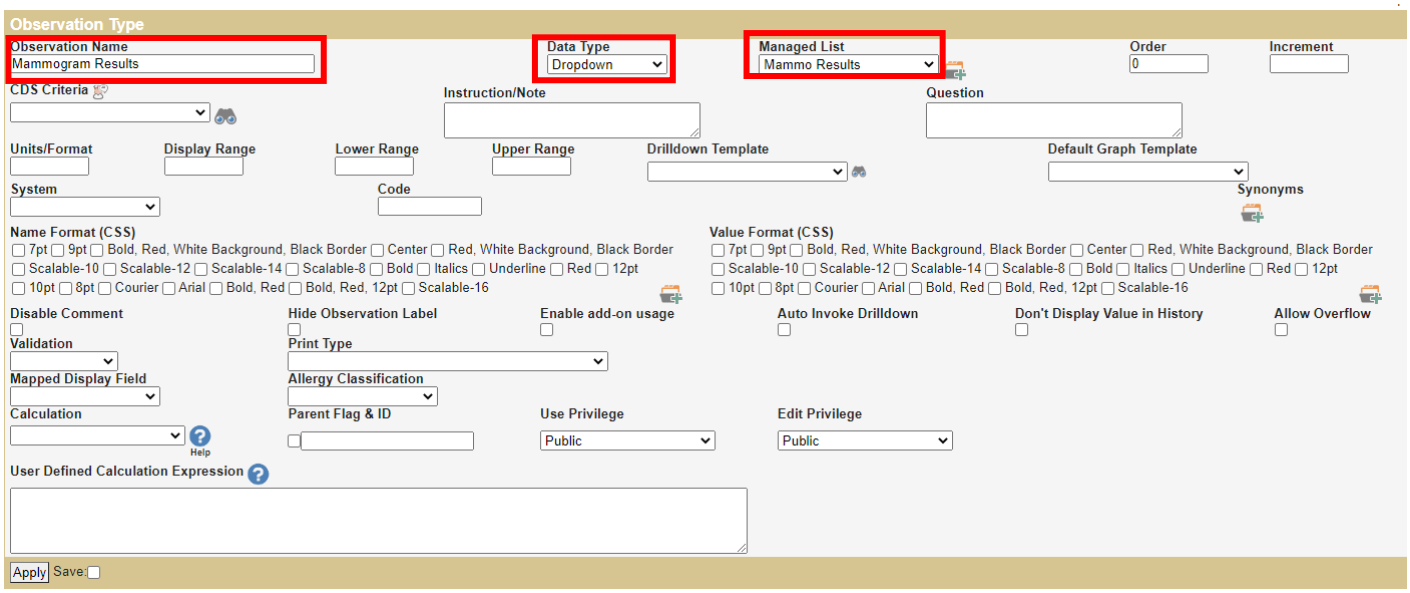
Table: Radiologists Suggested Follow Up Dropdown | Description | Code | Use Privilege: Public | Edit Privilege: Public

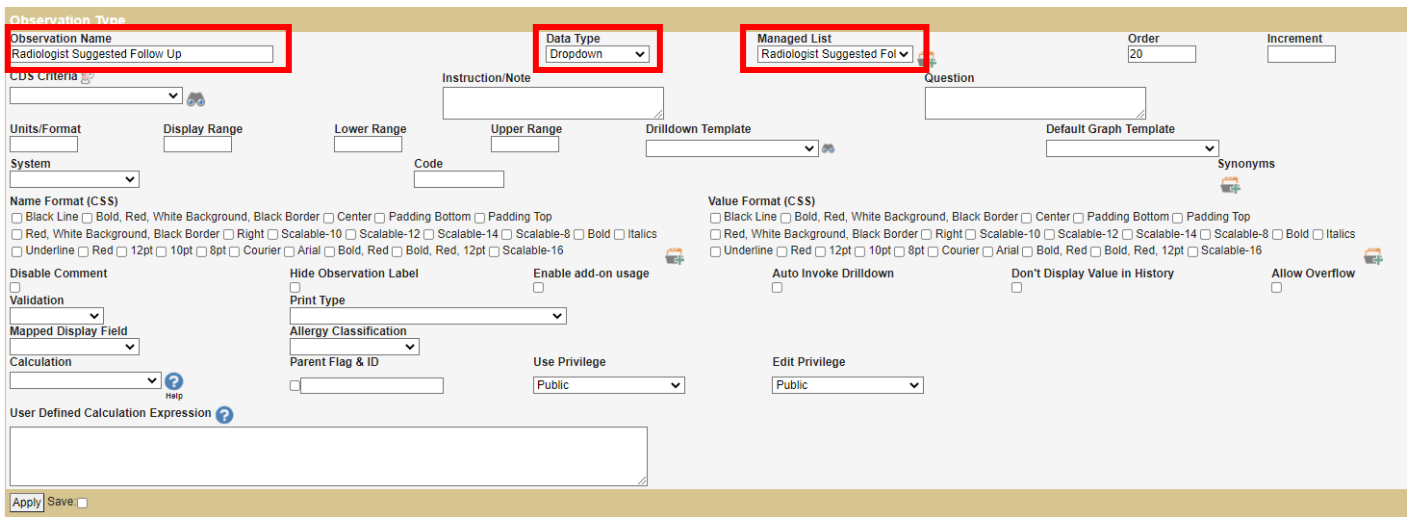
Name	Code	Active	Sort
Immediate - More Investigations Required	2064397	☑	10
3 Months	2064398	☑	20
6 Months	2064399	☑	30
1 Year	2064400	☑	40
1-2 Years	2064401	☑	50
2 Years - Routine	2064402	☑	60
Discontinue Screening	2064403	☑	70
None	2064404	☑	80

Export options: Excel | PDF | RTF

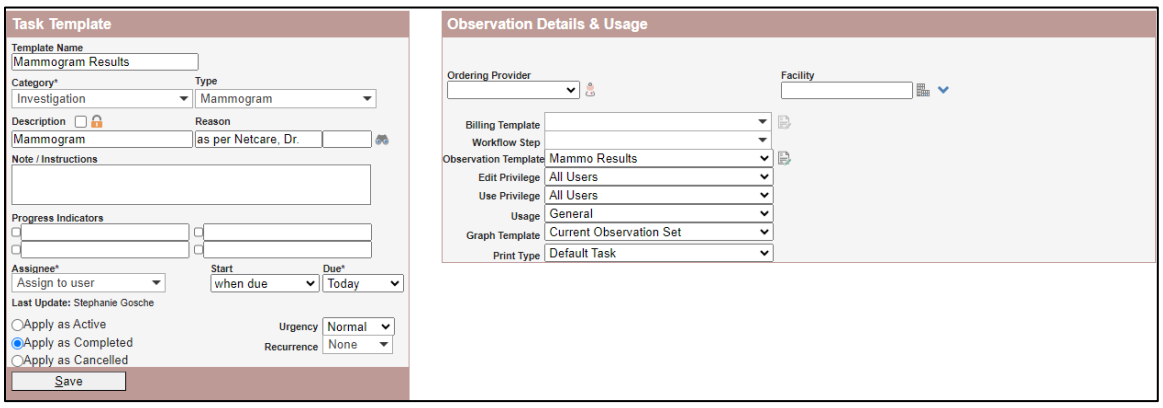
For the observation template:







For the task template:



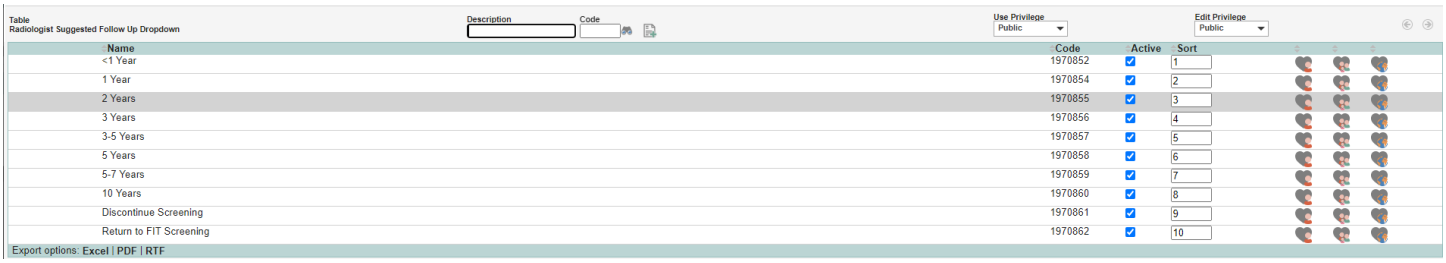
Colonoscopy Results

*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.

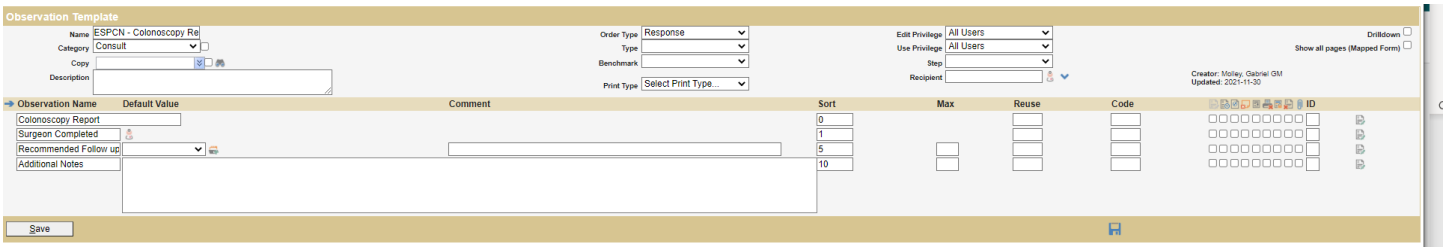
For the observations:

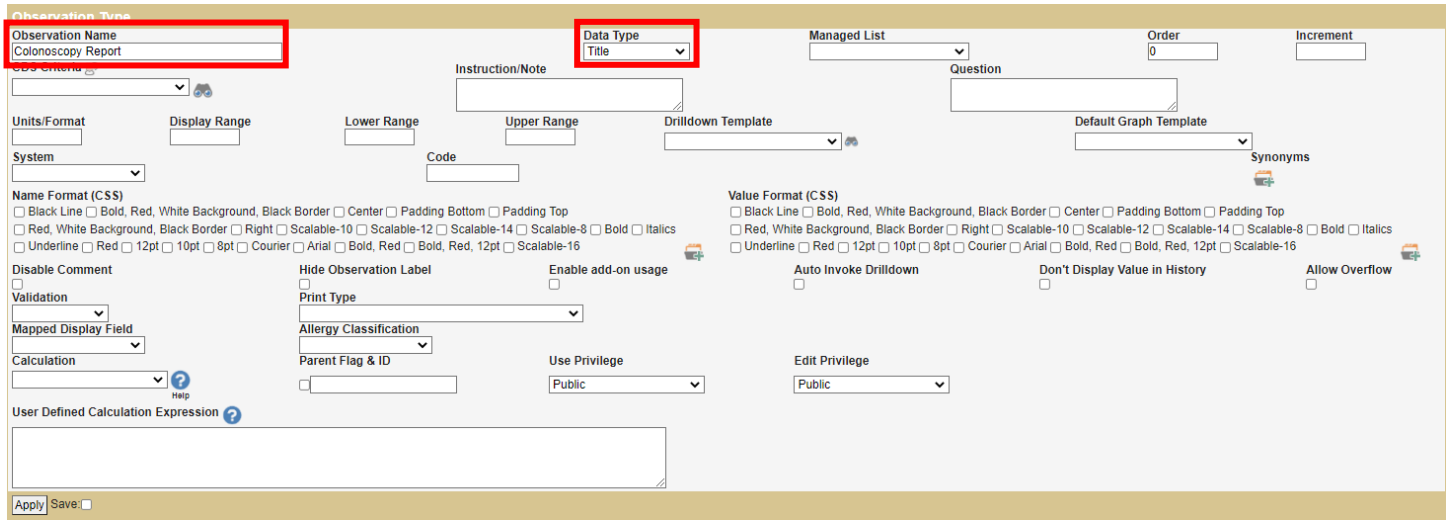
You need to create a managed list: the list is called Suggested Follow Up

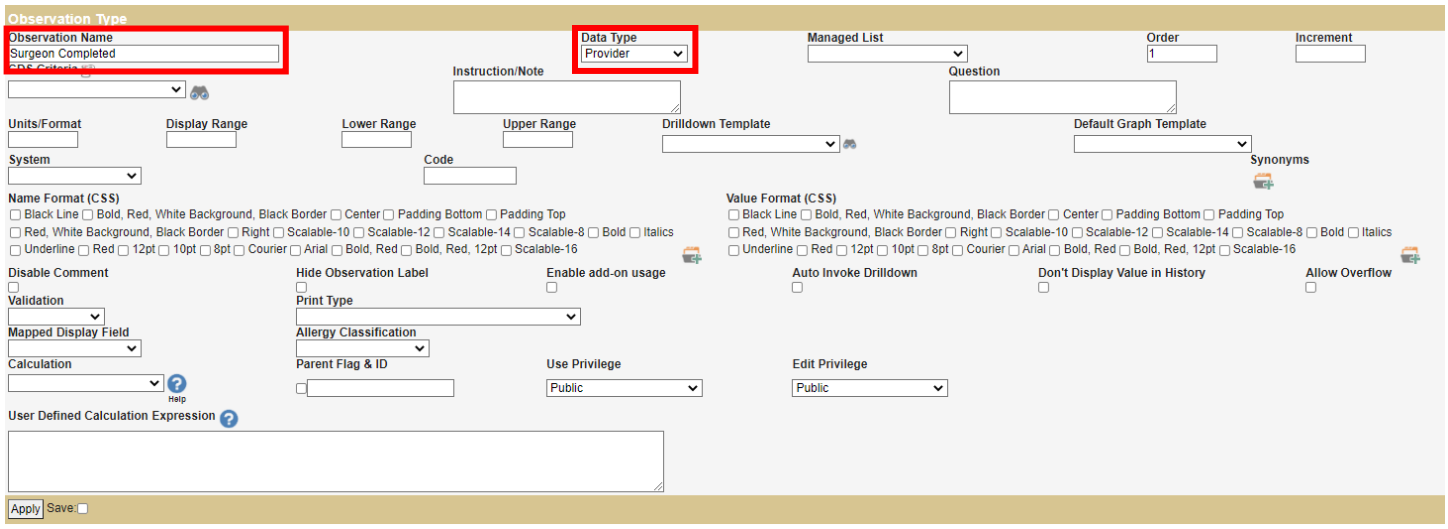
For the Managed List:

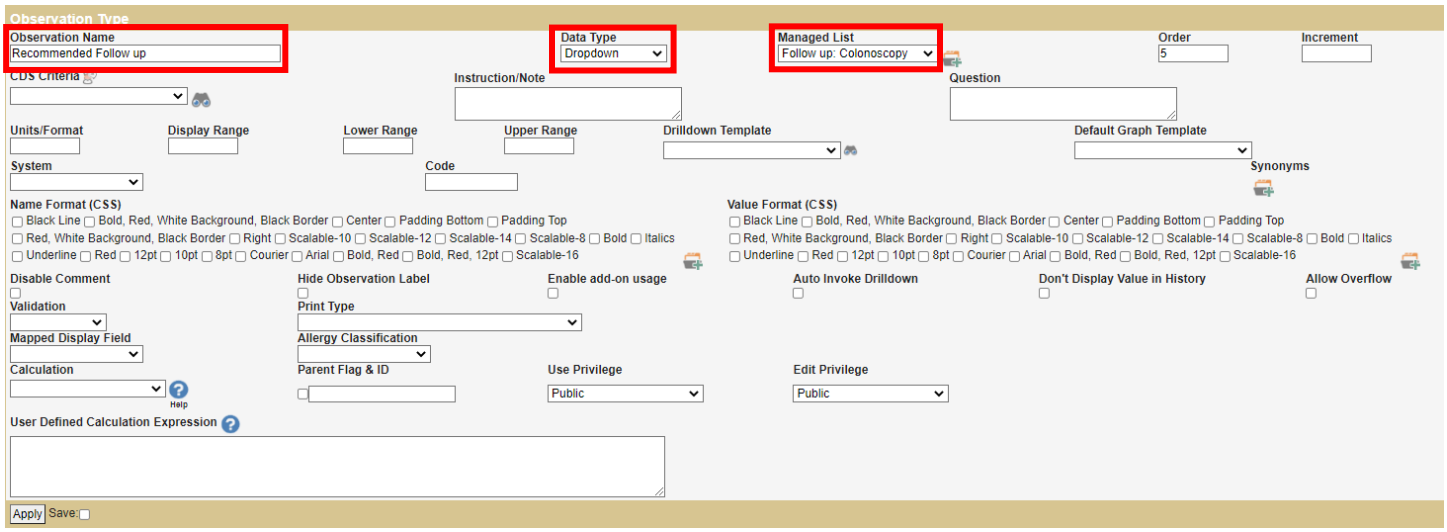


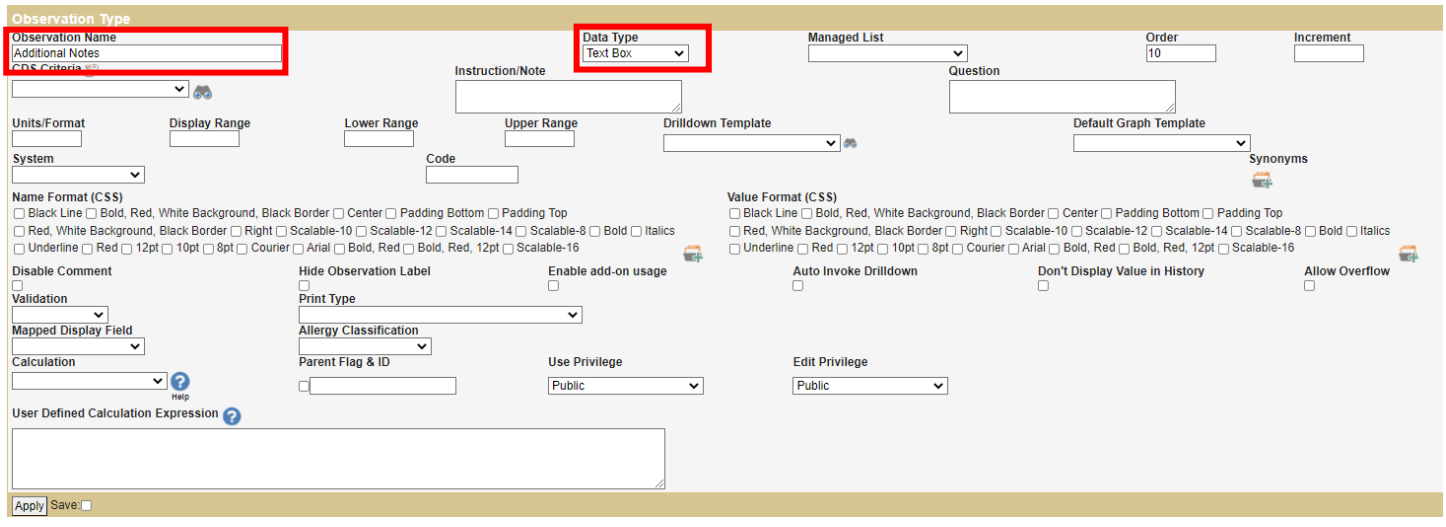
For the observation template:






Observation Type
Observation Name
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
Help
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
Help
Parent Flag & ID
Use Privilege
Public
Edit Privilege
Public
User Defined Calculation Expression
Apply
Save:


Observation Type
Observation Name
Additional Notes
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Text Box
Managed List
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10
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)
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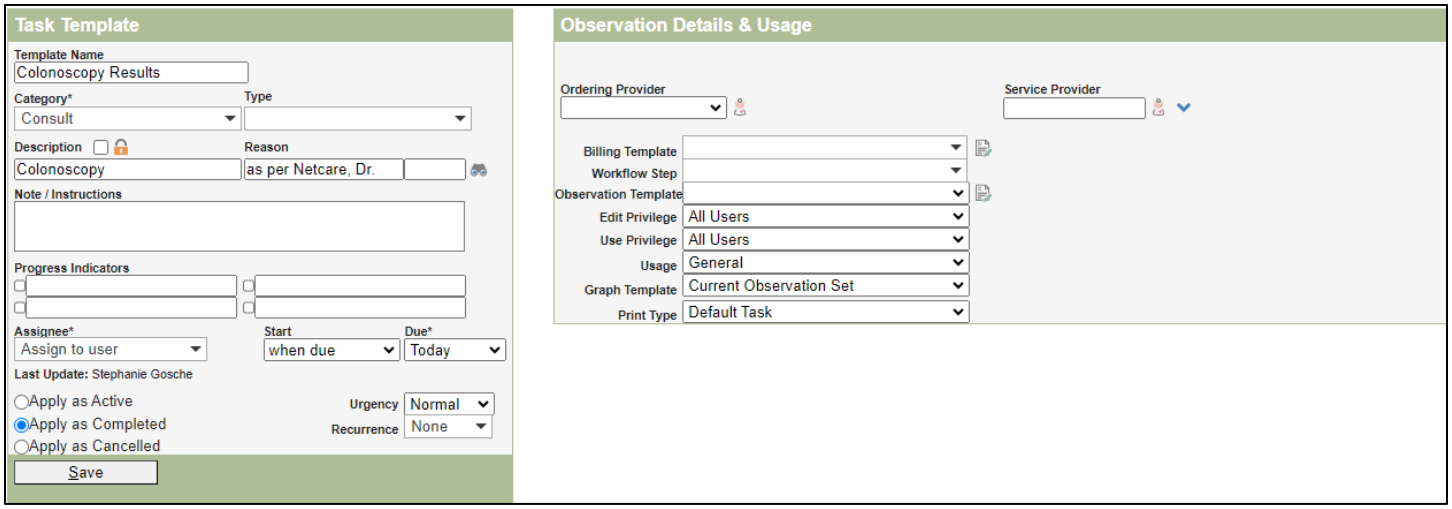
Enable add-on usage
Auto Invoke Drilldown
Don't Display Value in History
Allow Overflow
Validation
Print Type
Mapped Display Field
Allergy Classification
Calculation
Help
Parent Flag & ID
Use Privilege
Public
Edit Privilege
Public
User Defined Calculation Expression
Apply
Save:

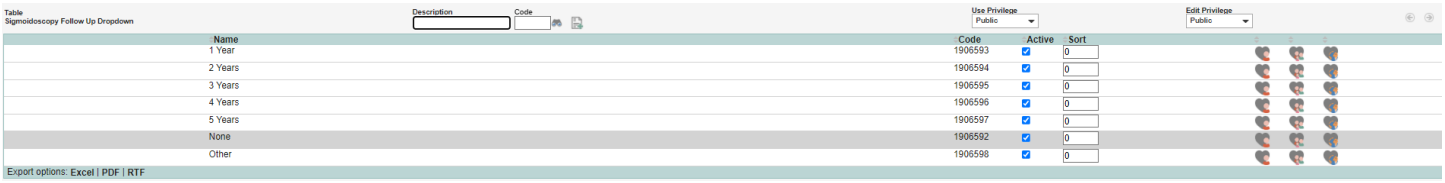
For the task template:



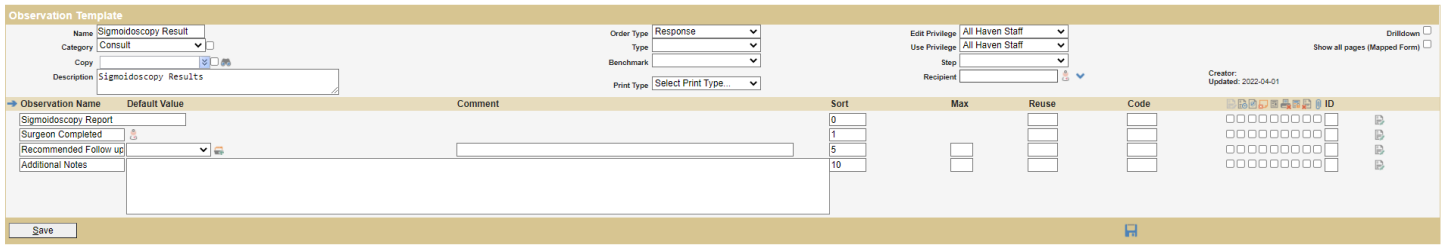
Sigmoidoscopy Results

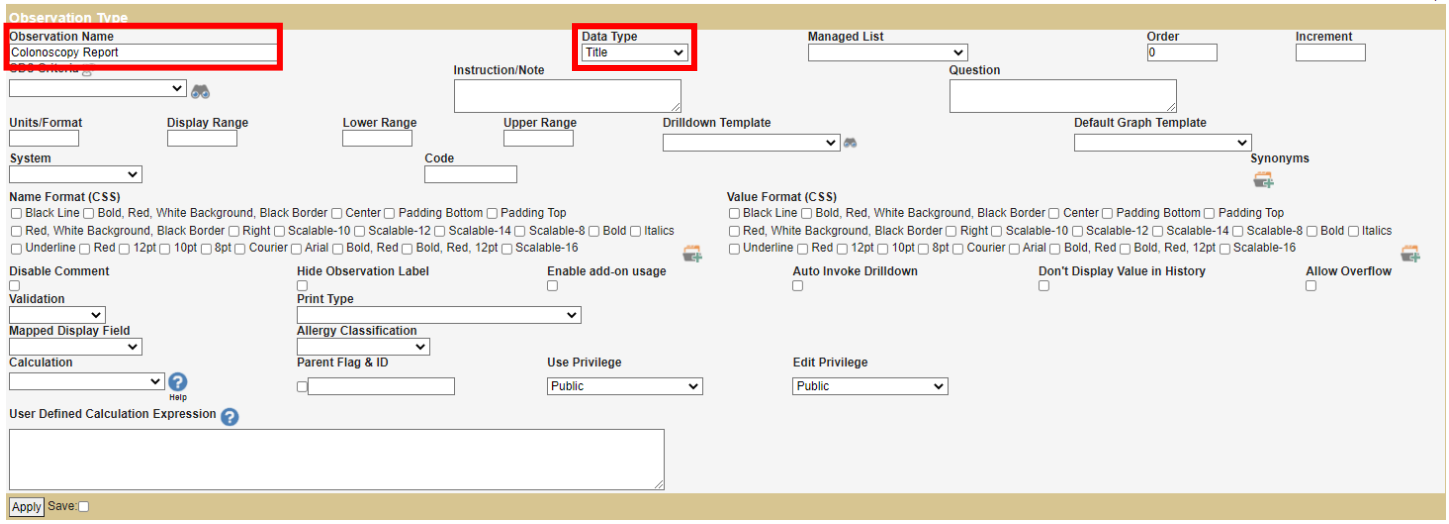
You will need to create a managed list called Sigmoidoscopy Follow Up

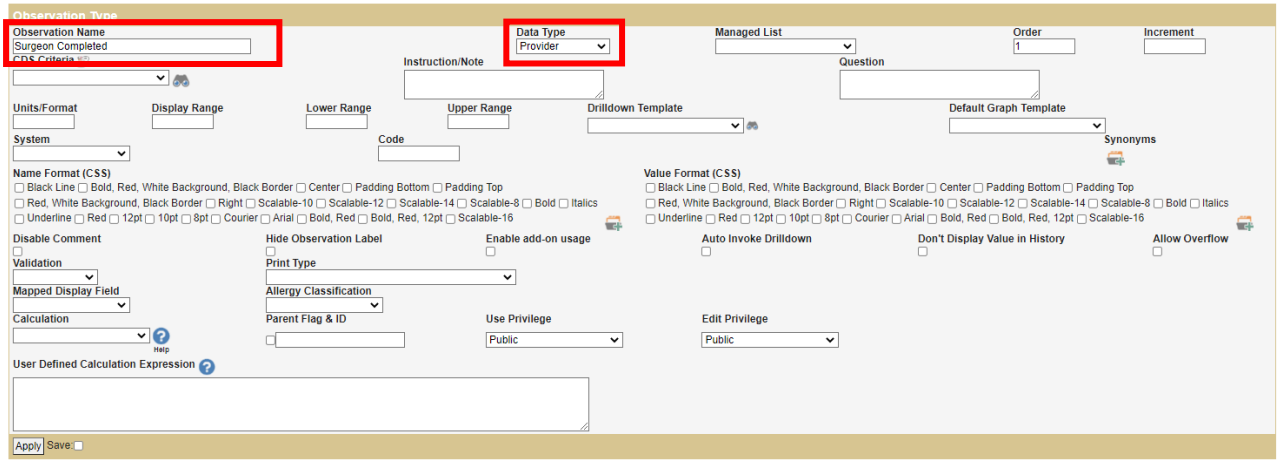
For the Managed List:

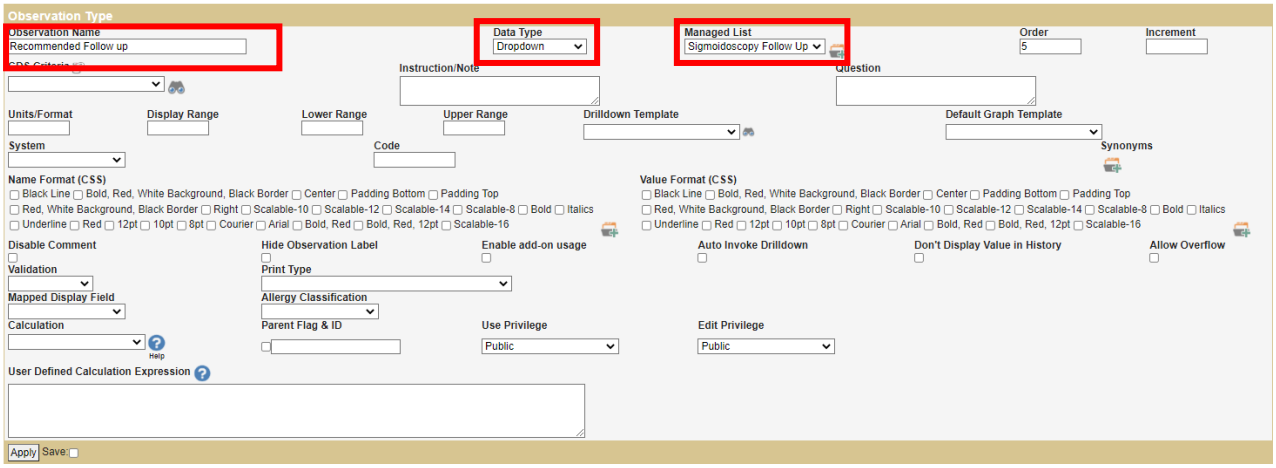


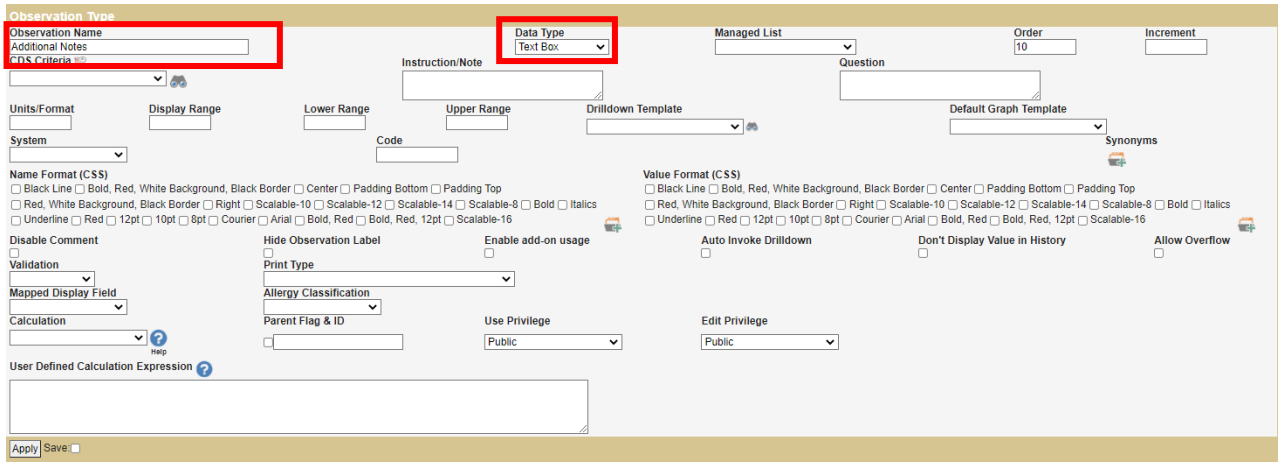
For the observation template:



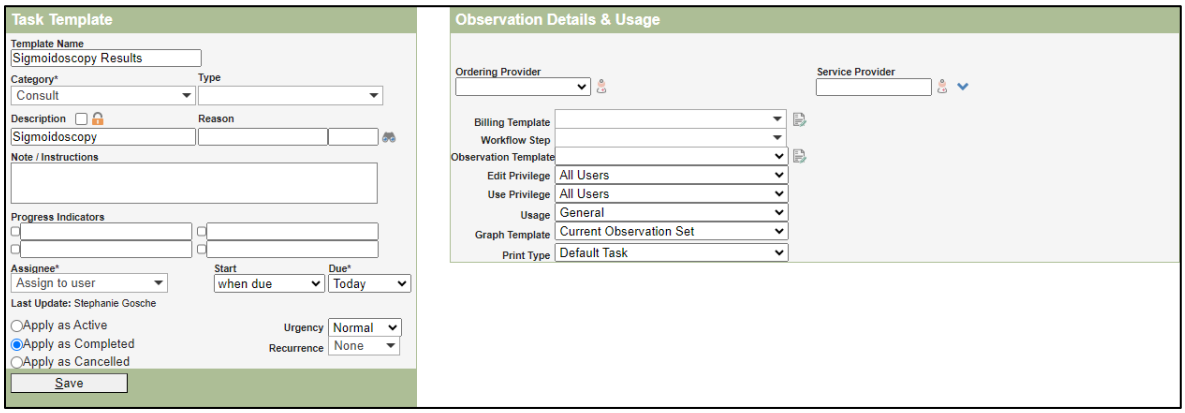








For the task template:



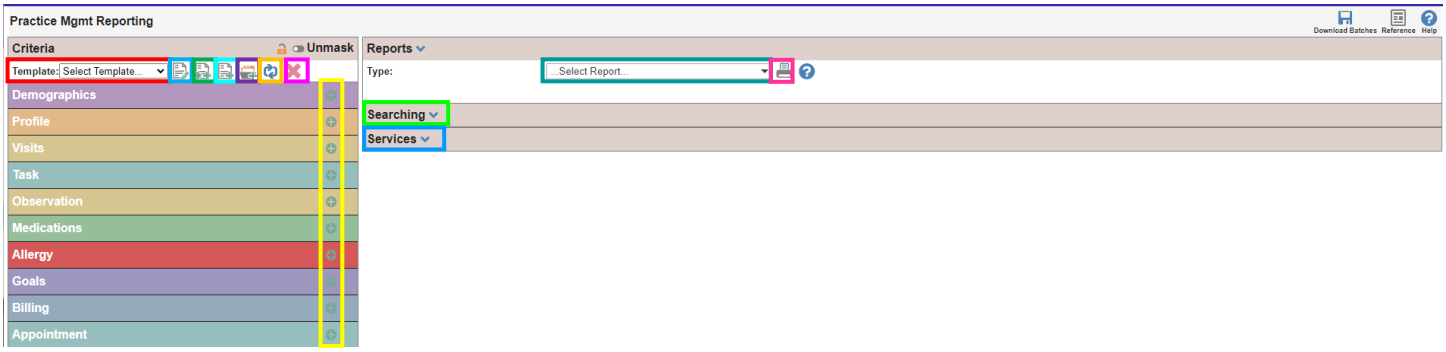
Reports Dashboard

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.

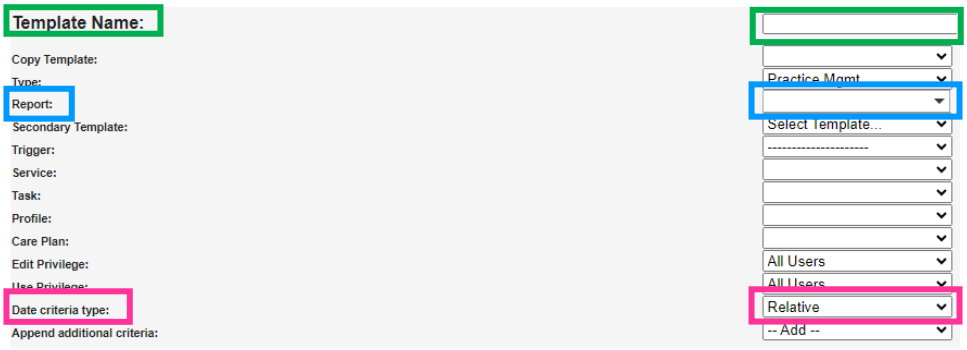
The reports screen looks like this when you open it.



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.

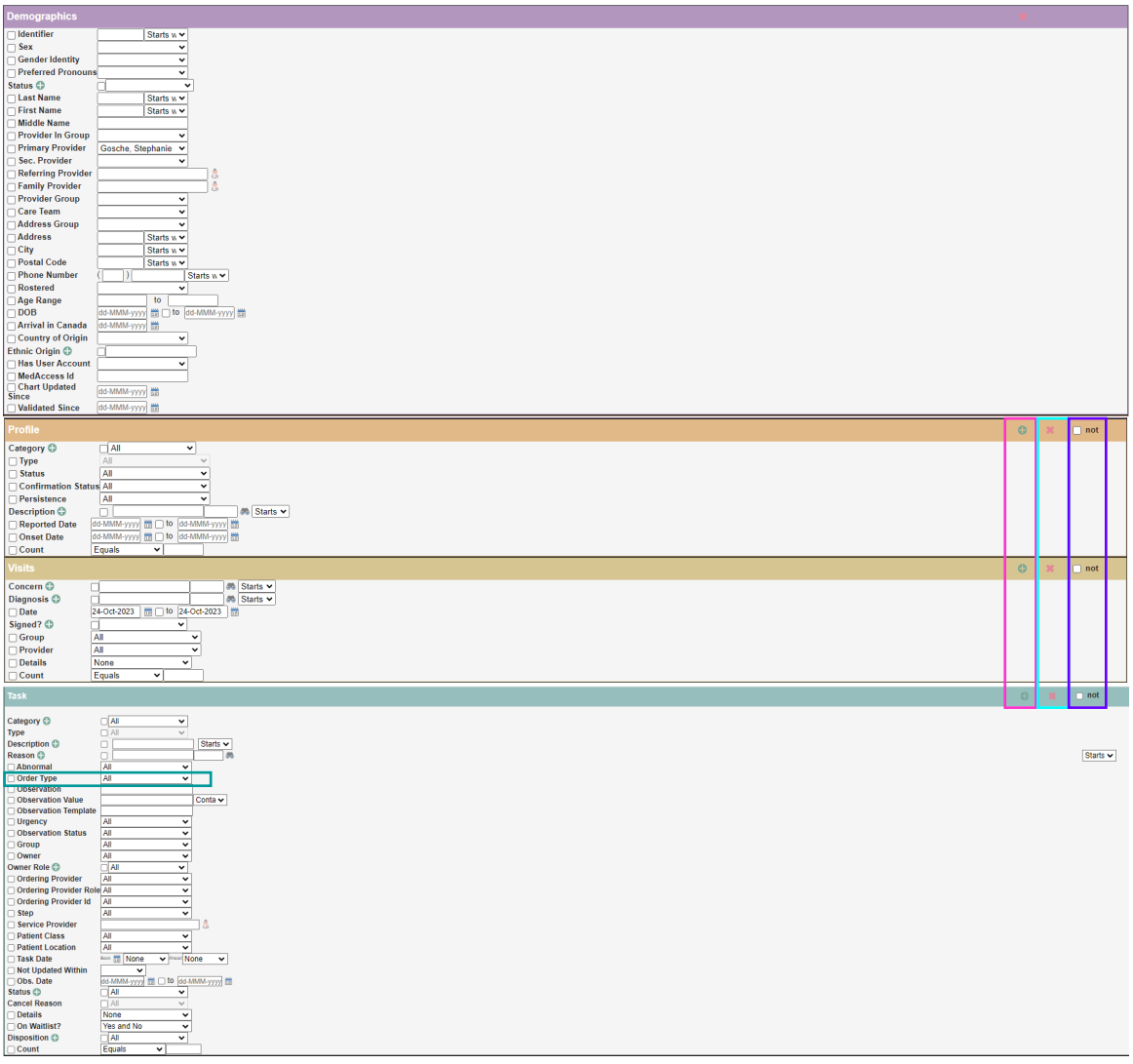


Template Name: as per our query naming guidelines.

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 item.*

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

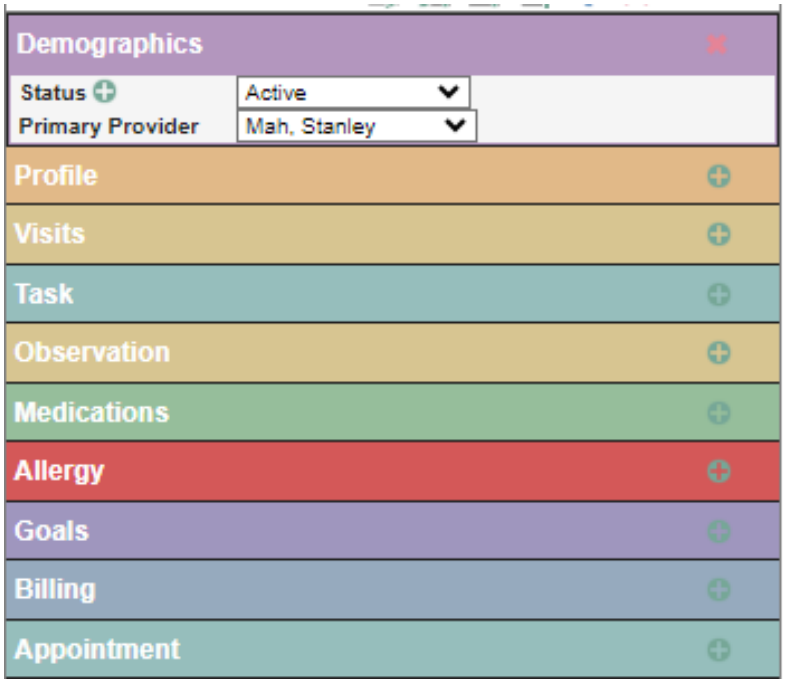
When you build your queries:

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.**

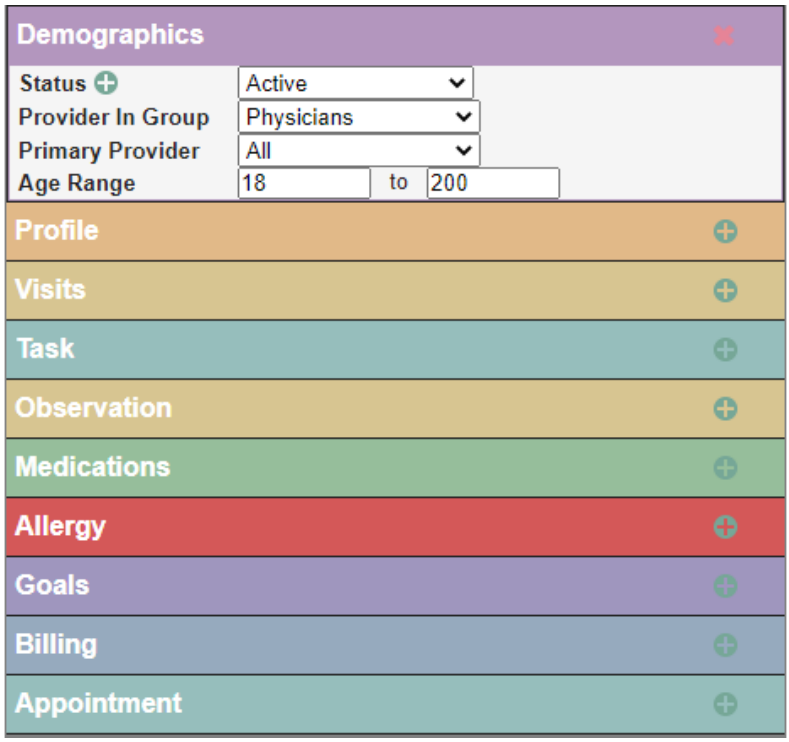
The fastest way to make the queries is to create your eligible queries, copy and edit them to create your due or numerator queries. Then copy and edit the due or numerator queries to create the outreach queries.

Quarterly Reporting Queries

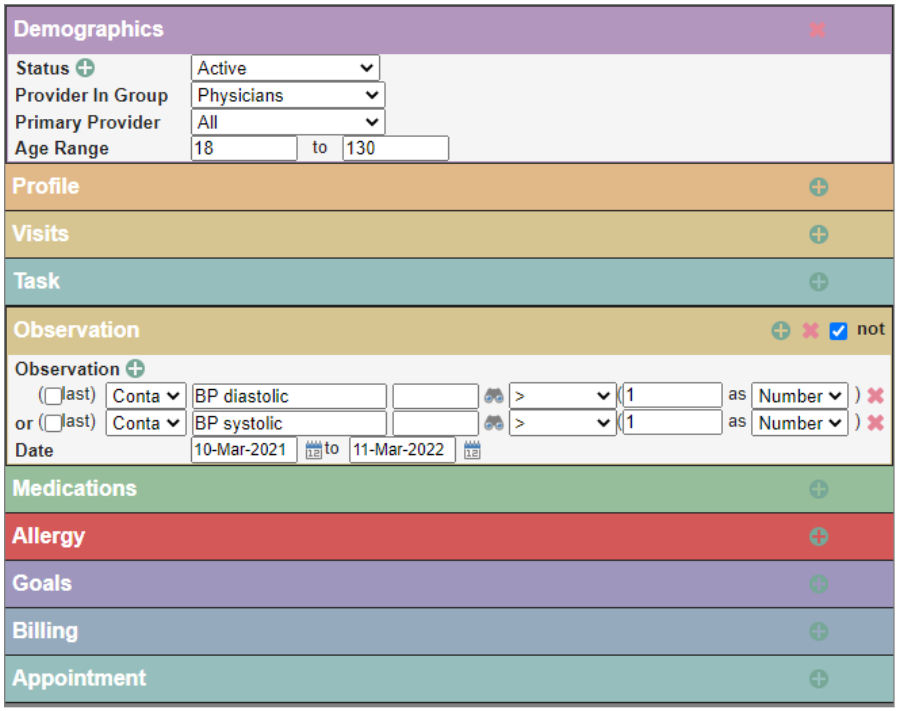
A) ESPCN – Quarterly – Panel Full (1 per doctor)



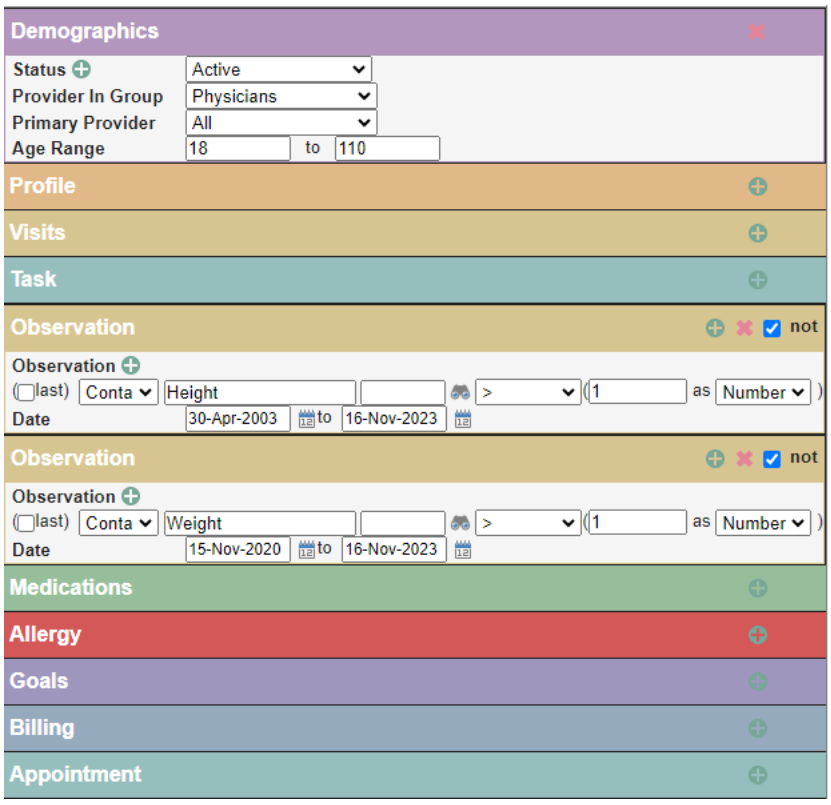
B) ESPCN – Quarterly – Eligible 18+ (Vitals & Lifestyle)



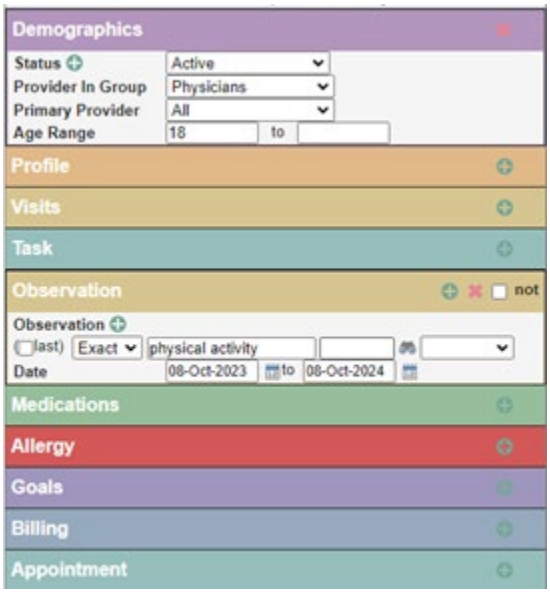
C) ESPCN – Quarterly – BP Due



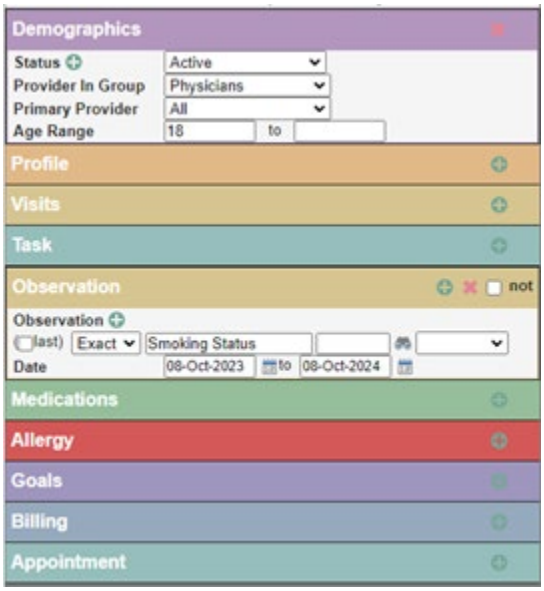
D) ESPCN – Quarterly – Height & Weight Due



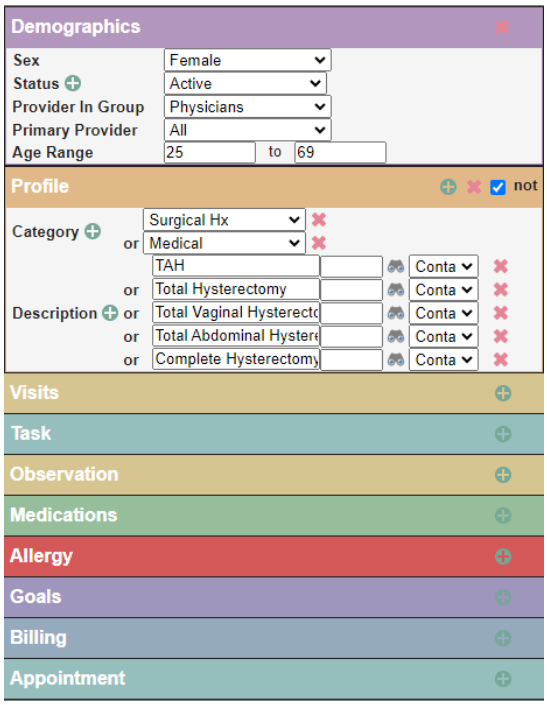
E) ESPCN – Quarterly – Exercise Assessment Due



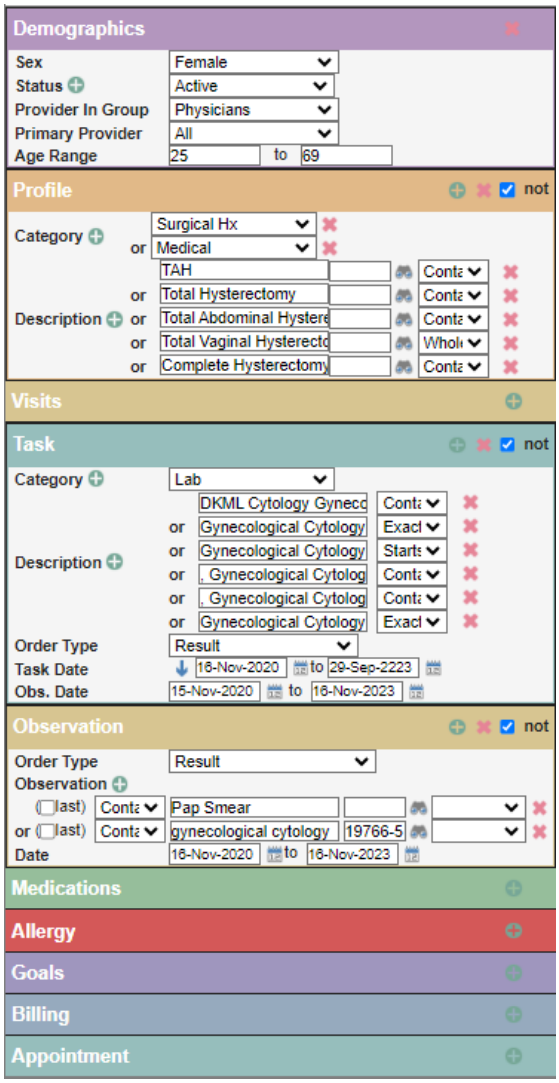
F) ESPCN – Quarterly – Tobacco Assessment Due



G) ESPCN – Quarterly – Pap Eligible



H) ESPCN – Quarterly – Pap Due



DKML Cytology Gynecological (contains)

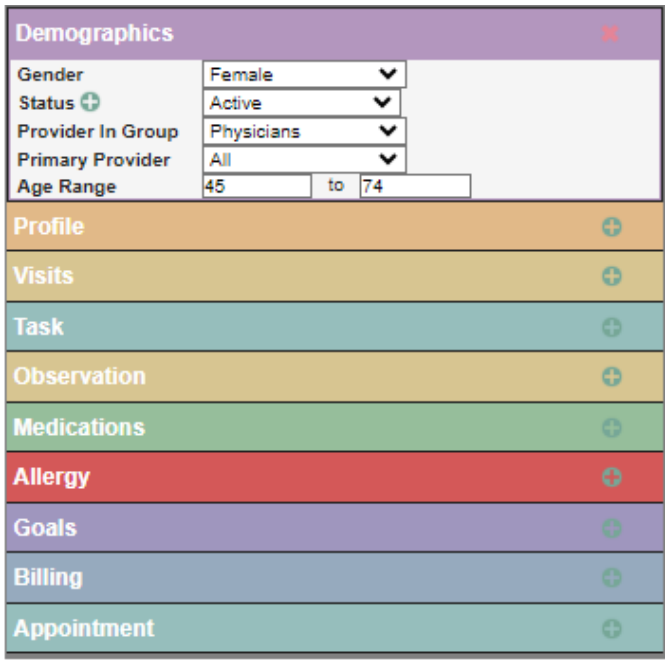
Gynecological Cytology (exact)

Gynecological Cytology (starts with)

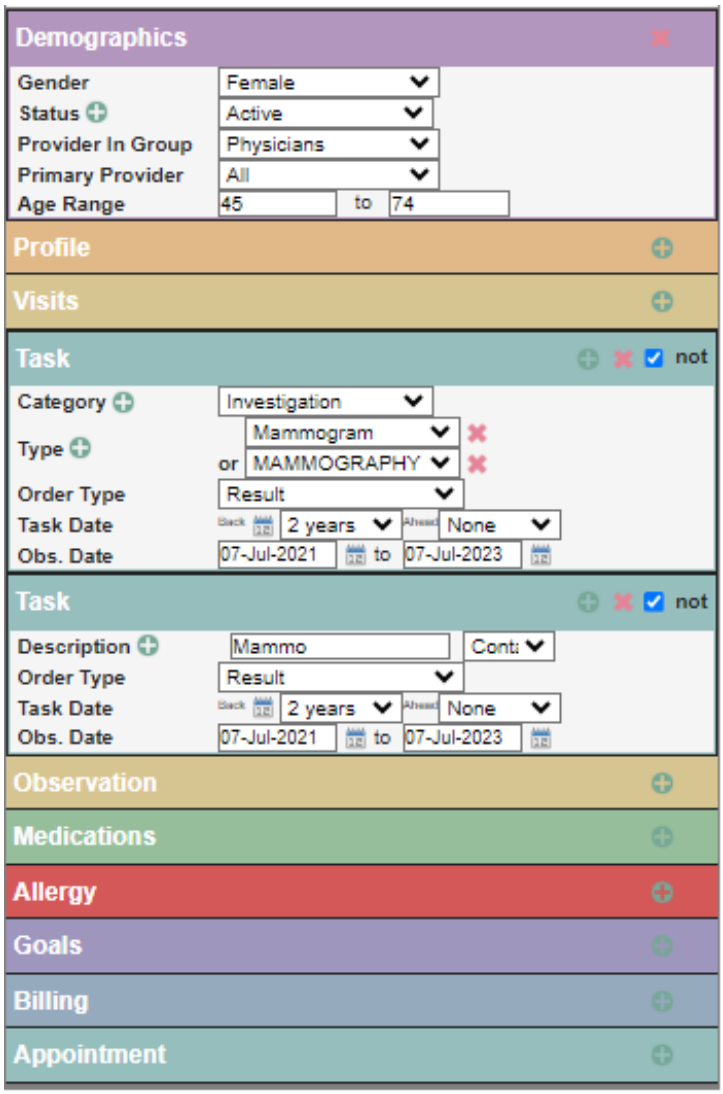
, Gynecological Cytology (contains)

, Gynecological Cytology, (contains)

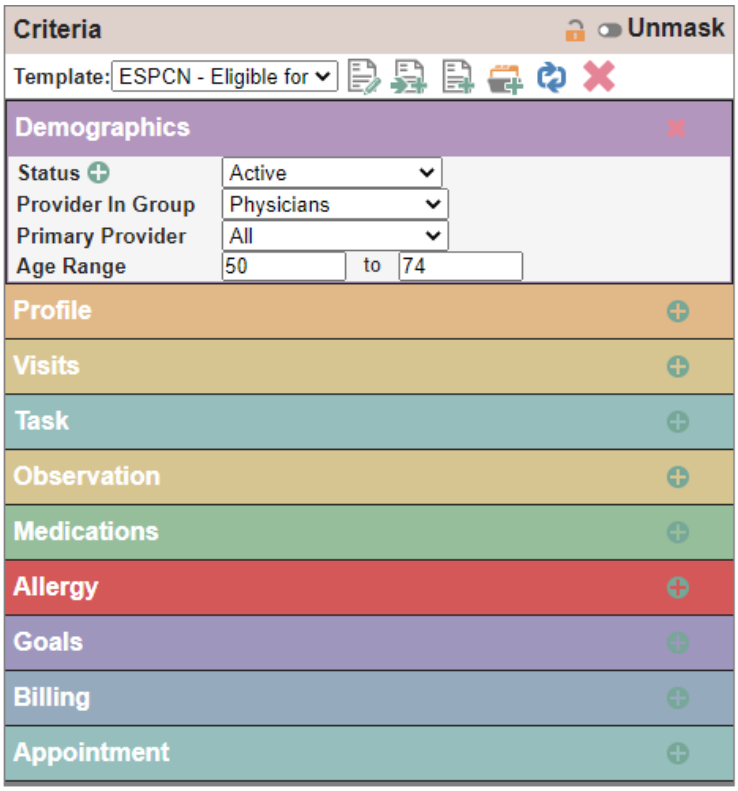
I) ESPCN – Quarterly – Mammo Eligible



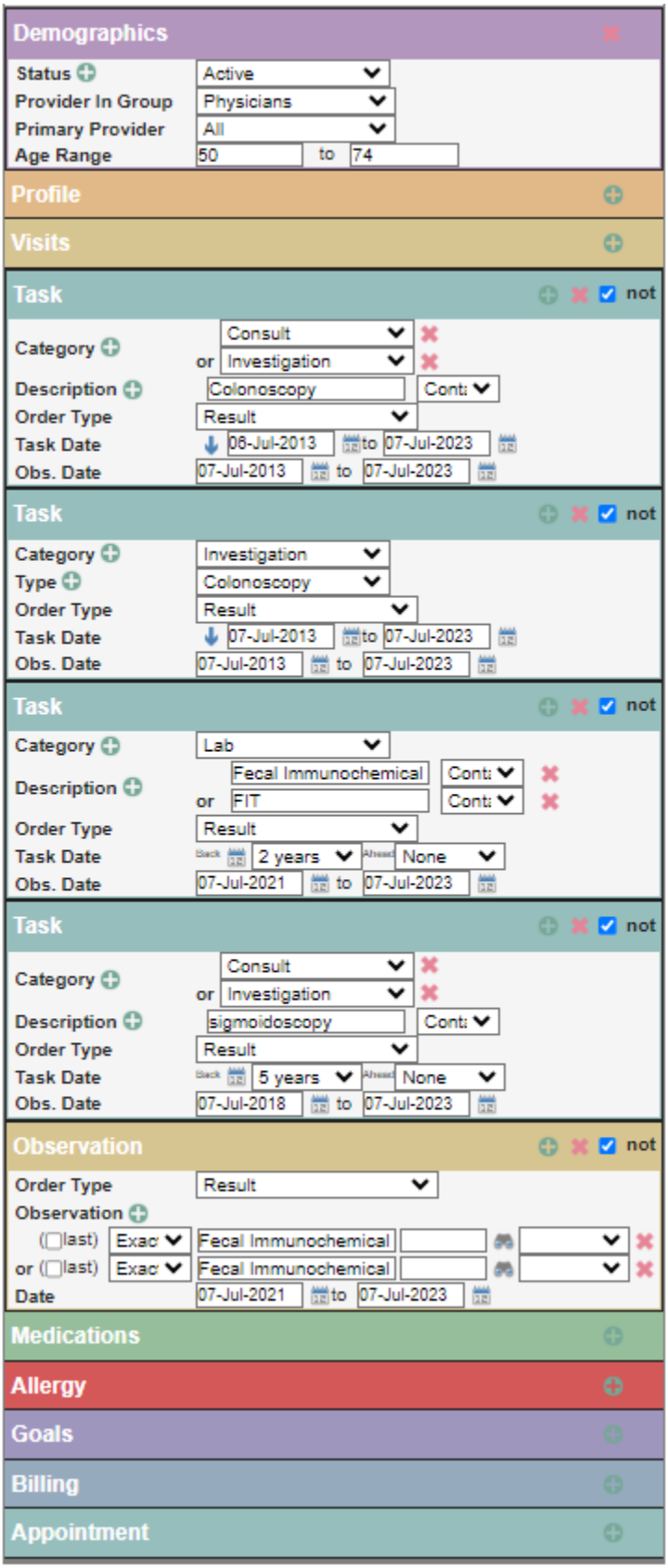
J) ESPCN – Quarterly – Mammo Due



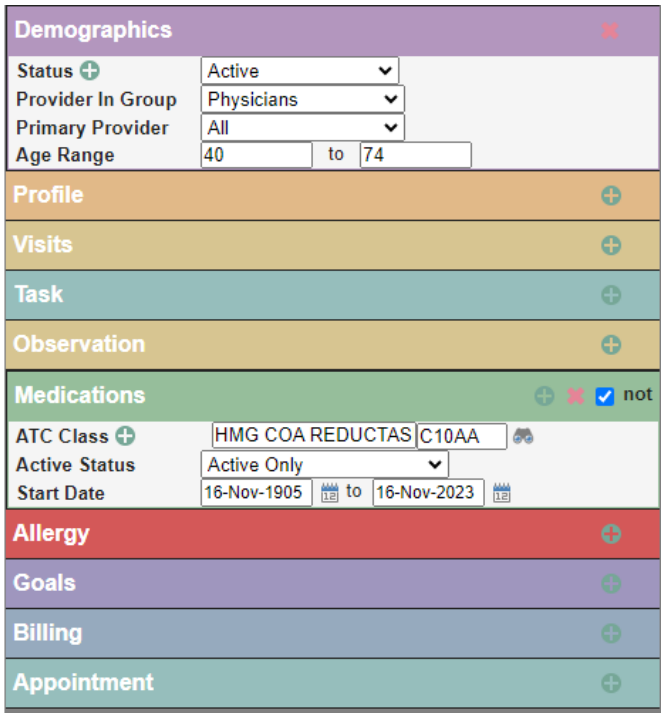
K) ESPCN – Quarterly – CRC Eligible



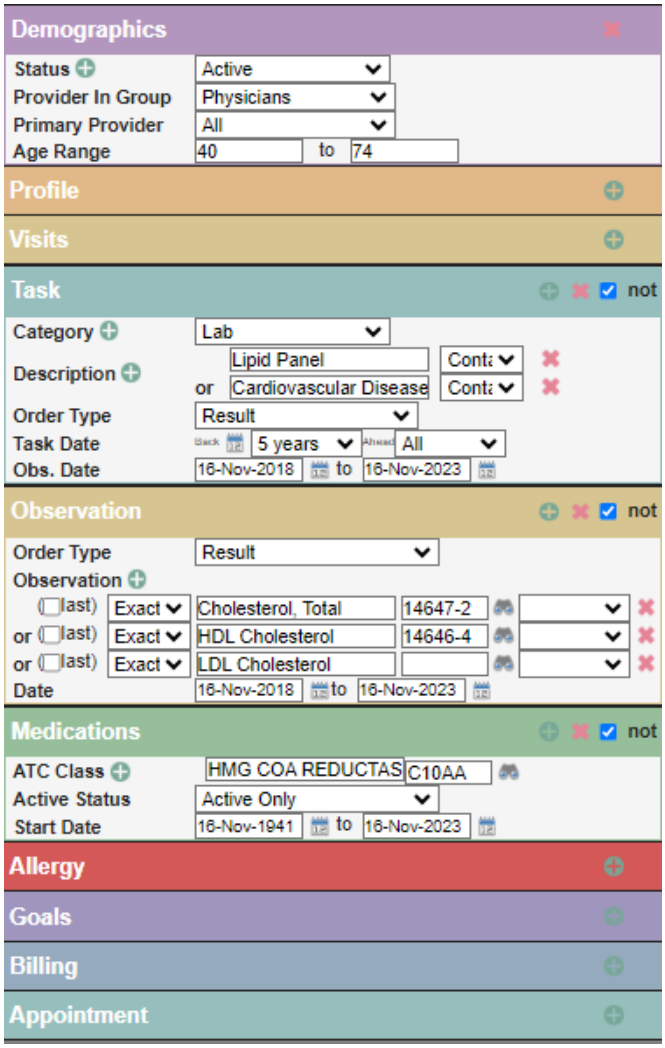
L) ESPCN – Quarterly – CRC Due



M) ESPCN – Quarterly – Lipids Eligible



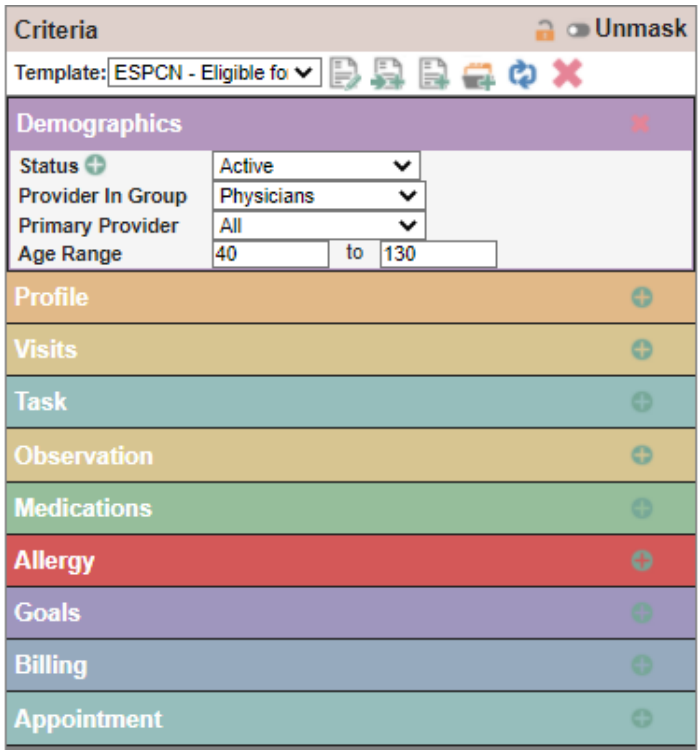
N) ESPCN – Quarterly – Lipids Due



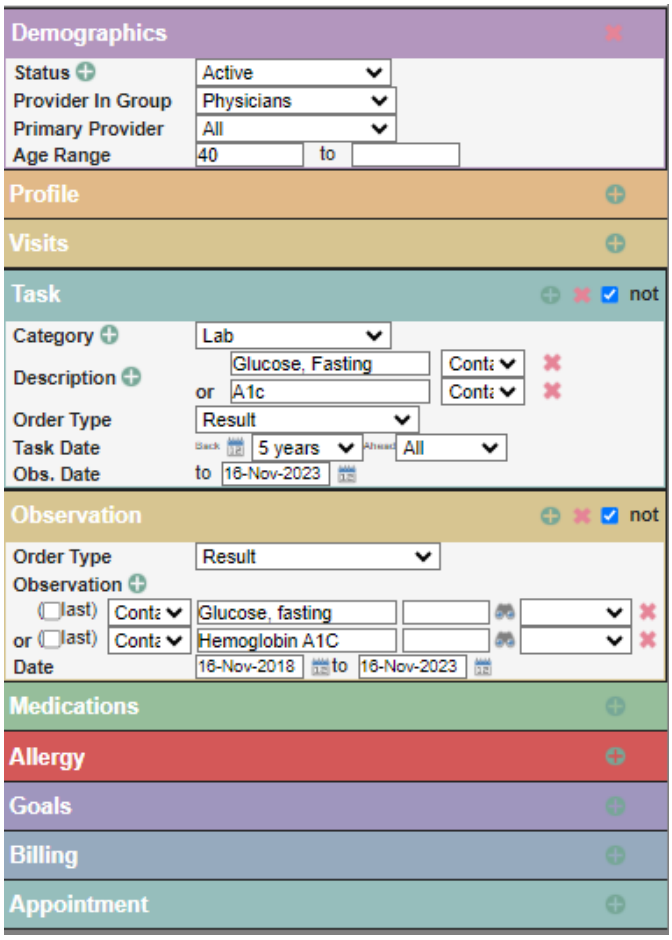
Lipid (contains)

Cardiovascular Disease Risk Assessment (contains)

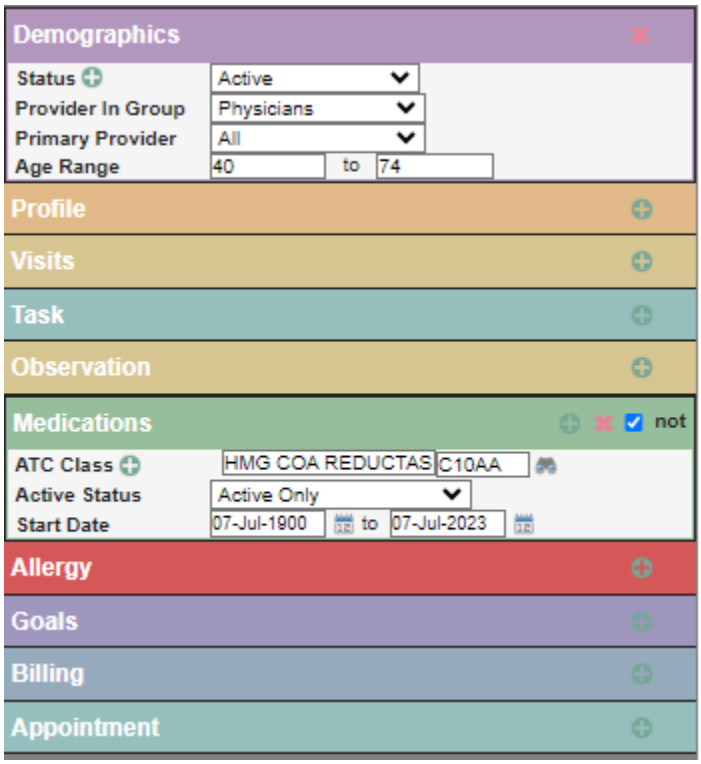
O) ESPCN – Quarterly – Diabetes Eligible



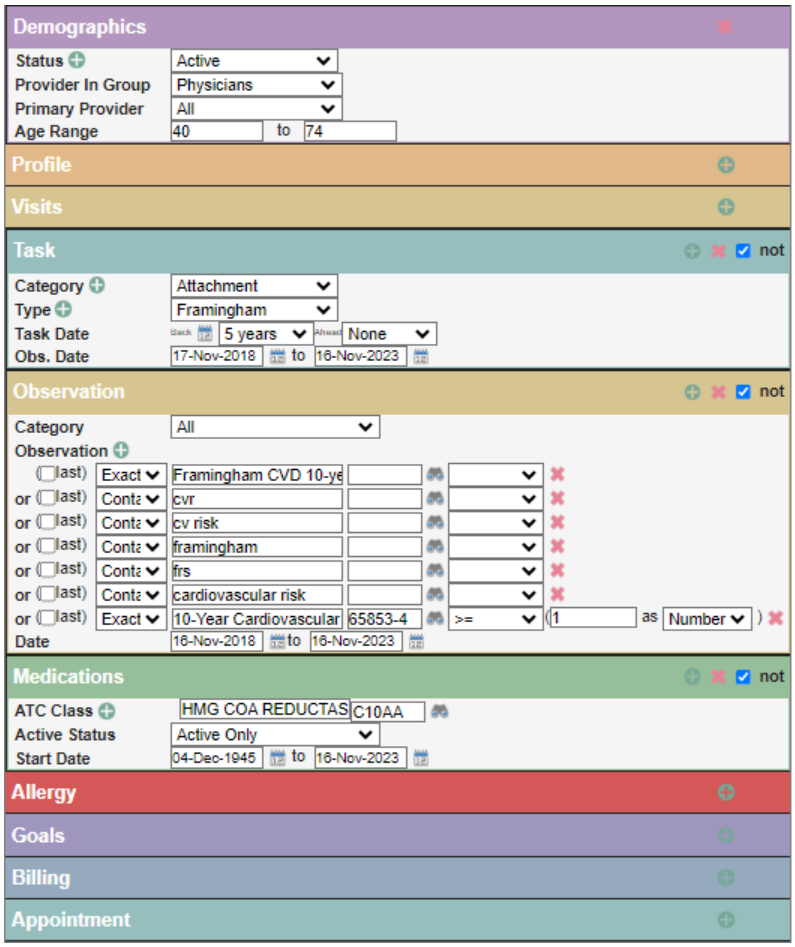
P) ESPCN – Quarterly – Diabetes Due



Q) ESPCN – Quarterly – CV Risk Eligible

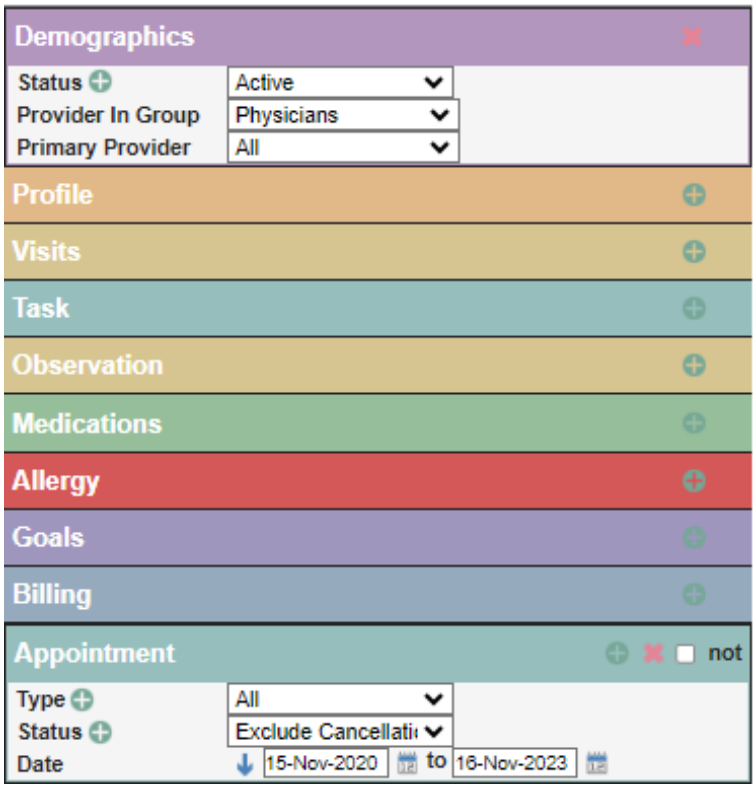


R) ESPCN – Quarterly – CV Risk Due

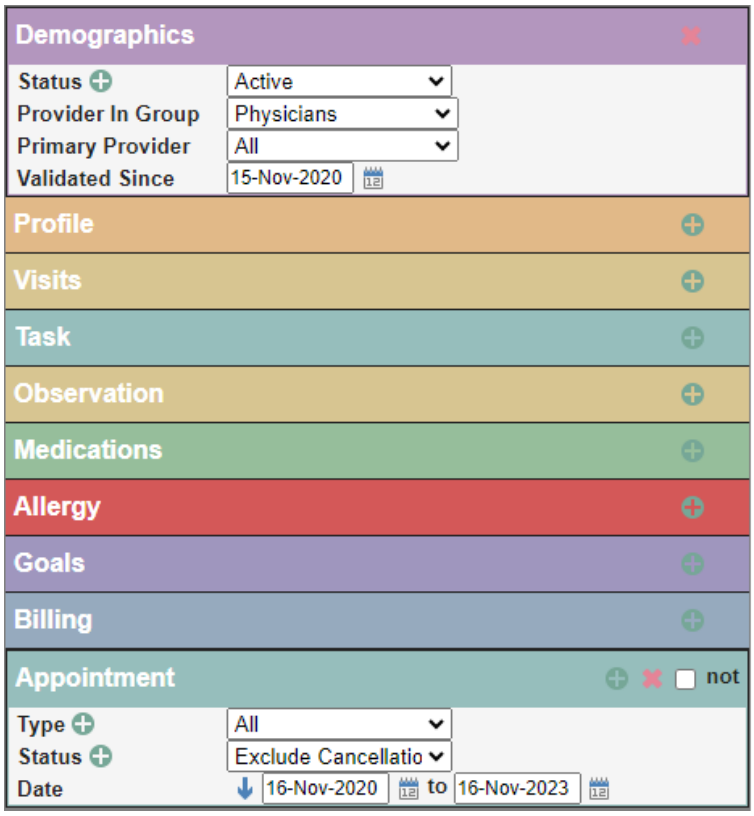


10-Year Cardiovascular Disease Risk	65853-4	>= 1

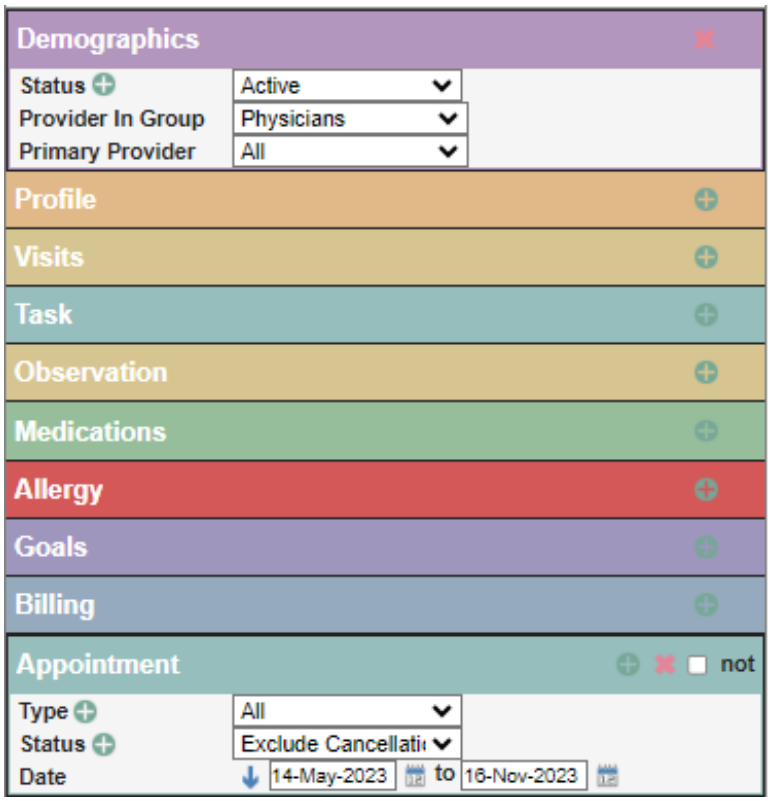
S) ESPCN – Quarterly – VR - # of Appointments in 3 Years



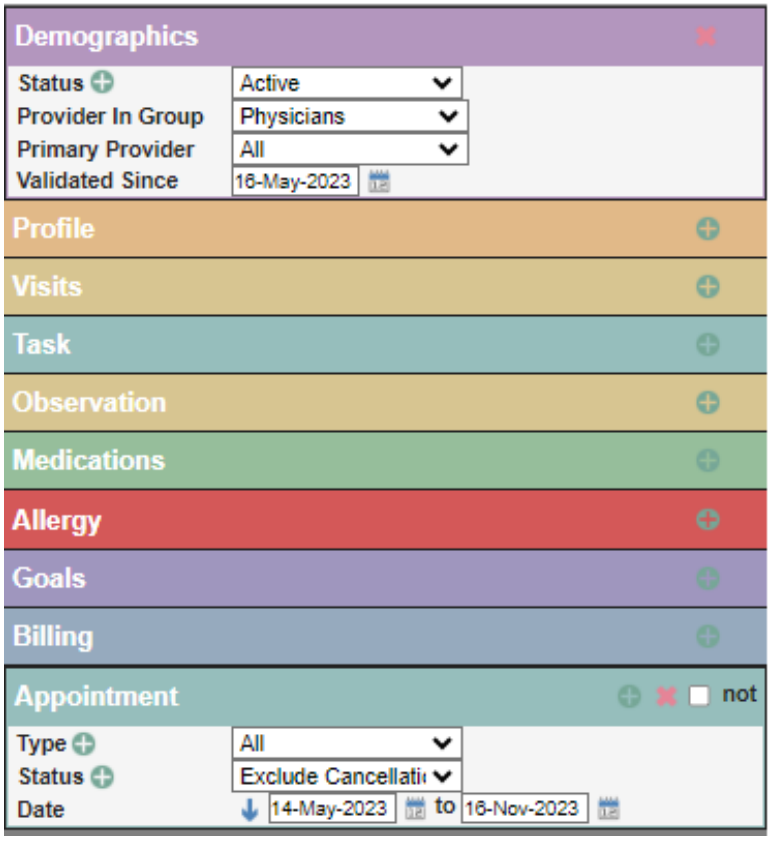
T) ESPCN – Quarterly – VR - # of Patients Verified in 3 Years



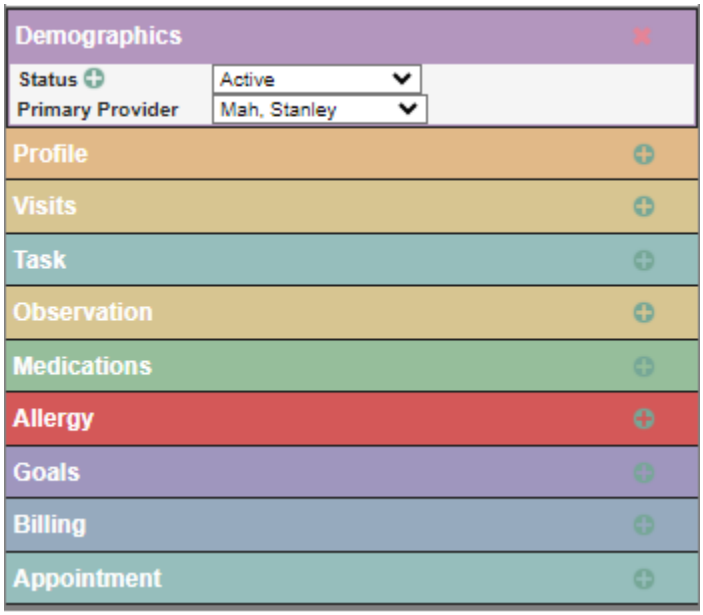
U) ESPCN – Quarterly – VR - # of Appointments in 6 Months



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

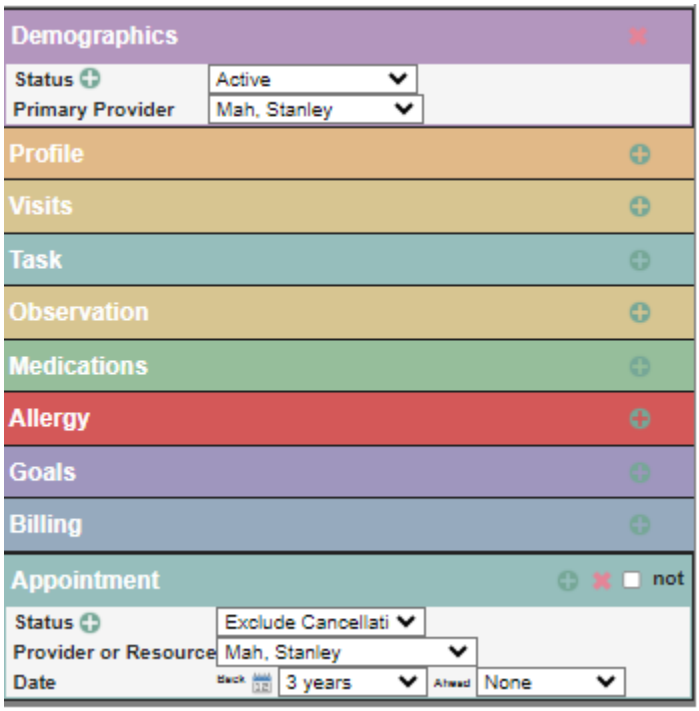


W) ESPCN – Quarterly QI – Active Patients (Denominator)



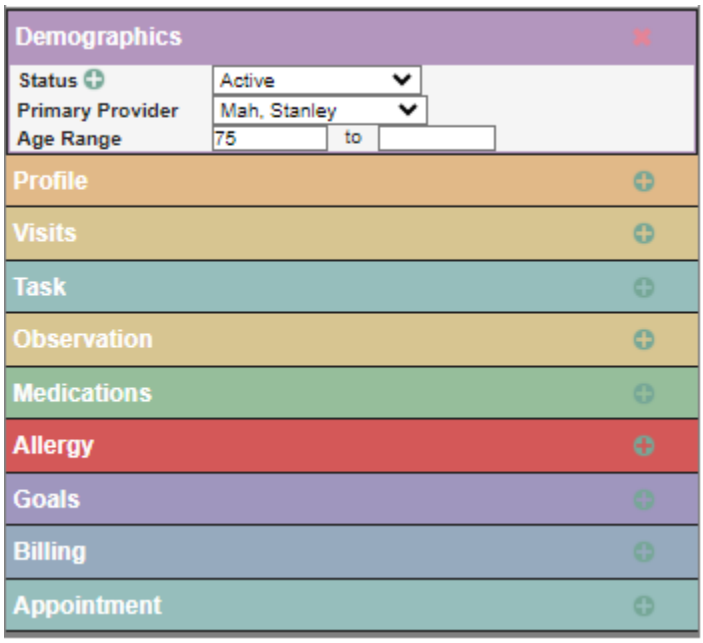
**** Use clinic's specific active panel criteria, create one report per doctor.**

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



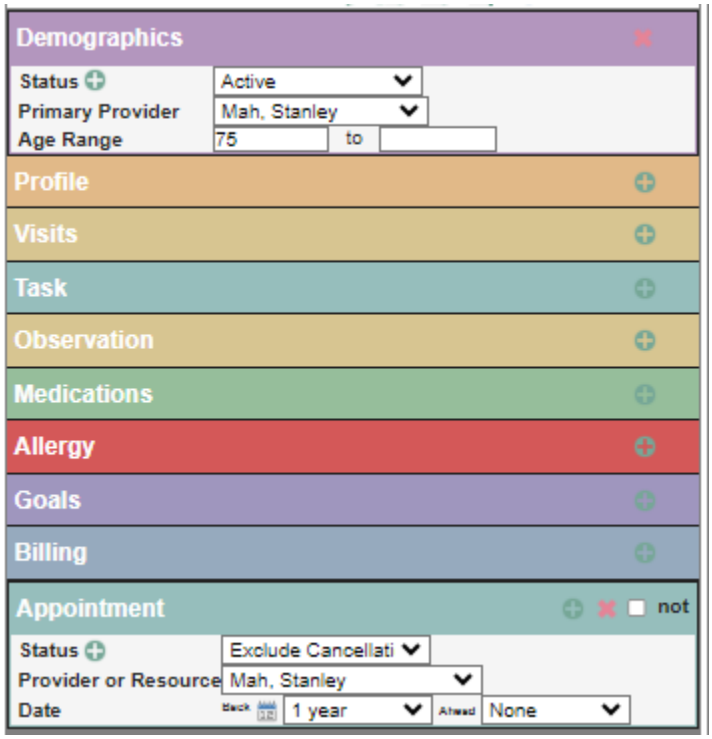
**** Use clinic's specific active panel criteria, create one report per doctor.**

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



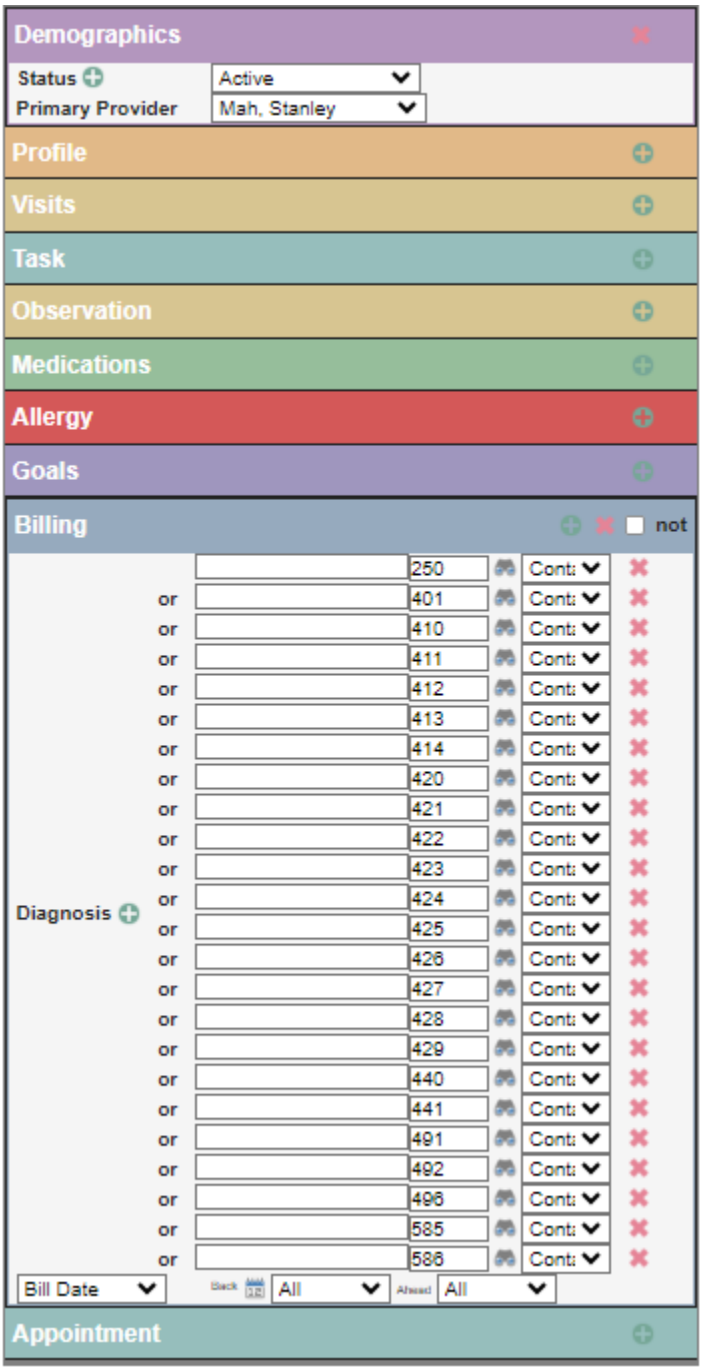
**** Use clinic's specific active panel criteria, create one report per doctor.**

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



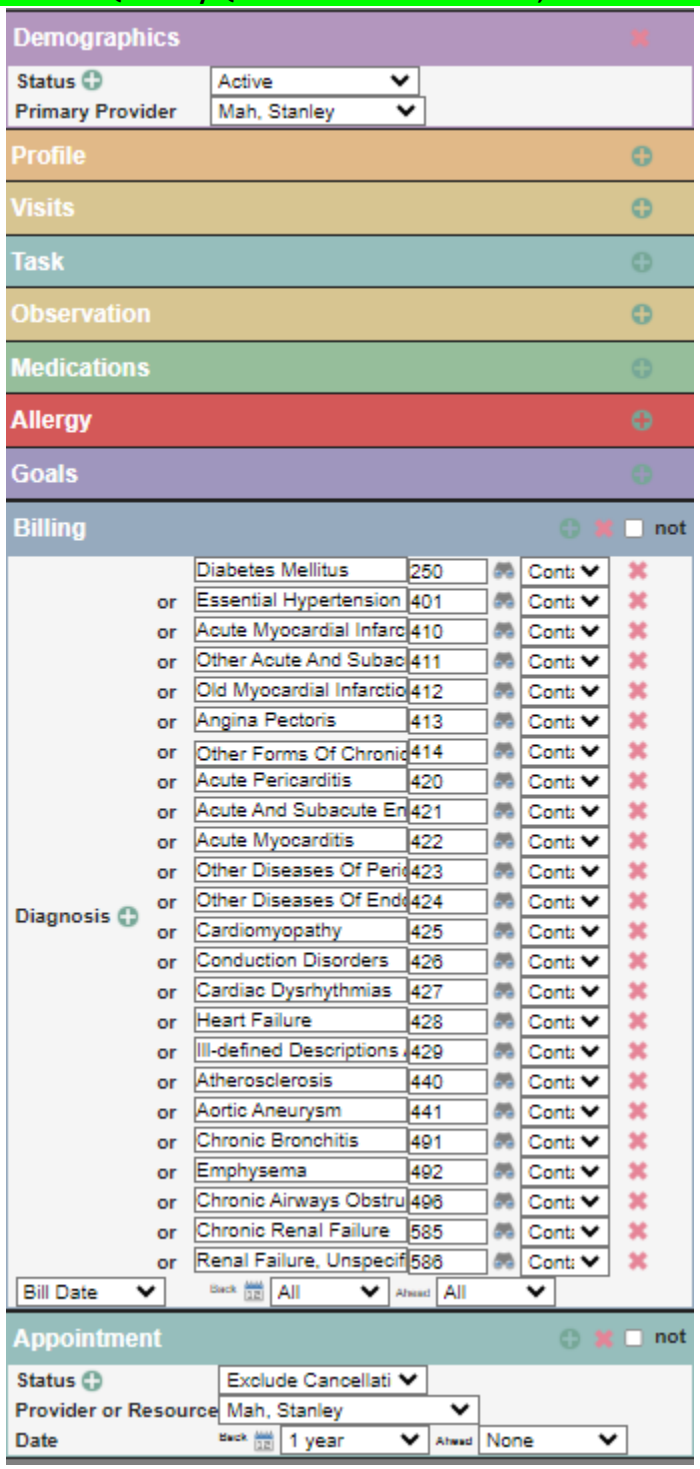
**** Use clinic's specific active panel criteria, create one report per doctor.**

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



**** 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)

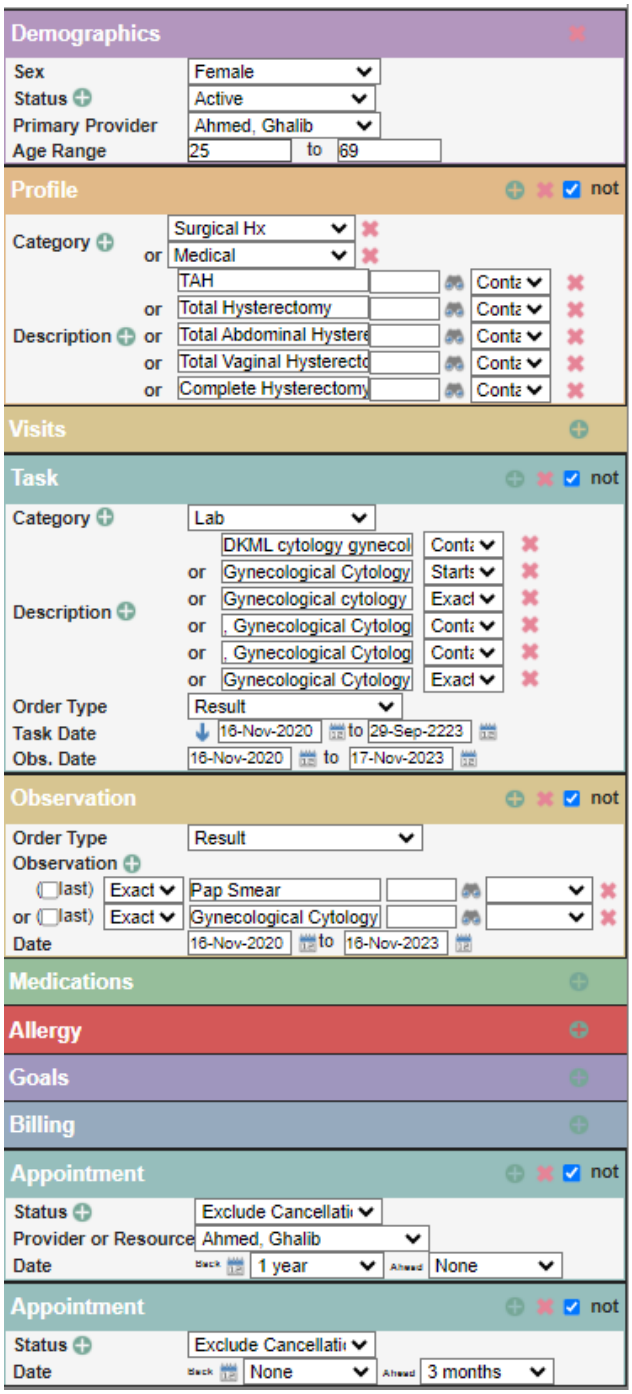


**** Use clinic's specific active panel criteria, create one report per doctor.**

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



DKML Cytology Gynecological (contains)

Gynecological Cytology (exact)

Gynecological Cytology (starts with)

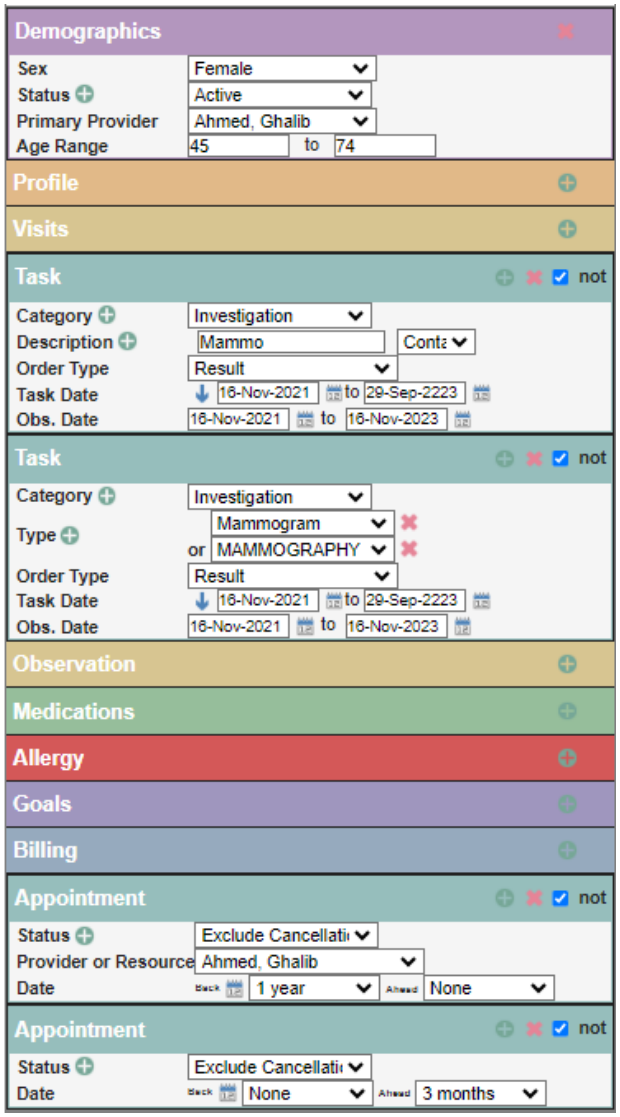
, Gynecological Cytology (contains)

, 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

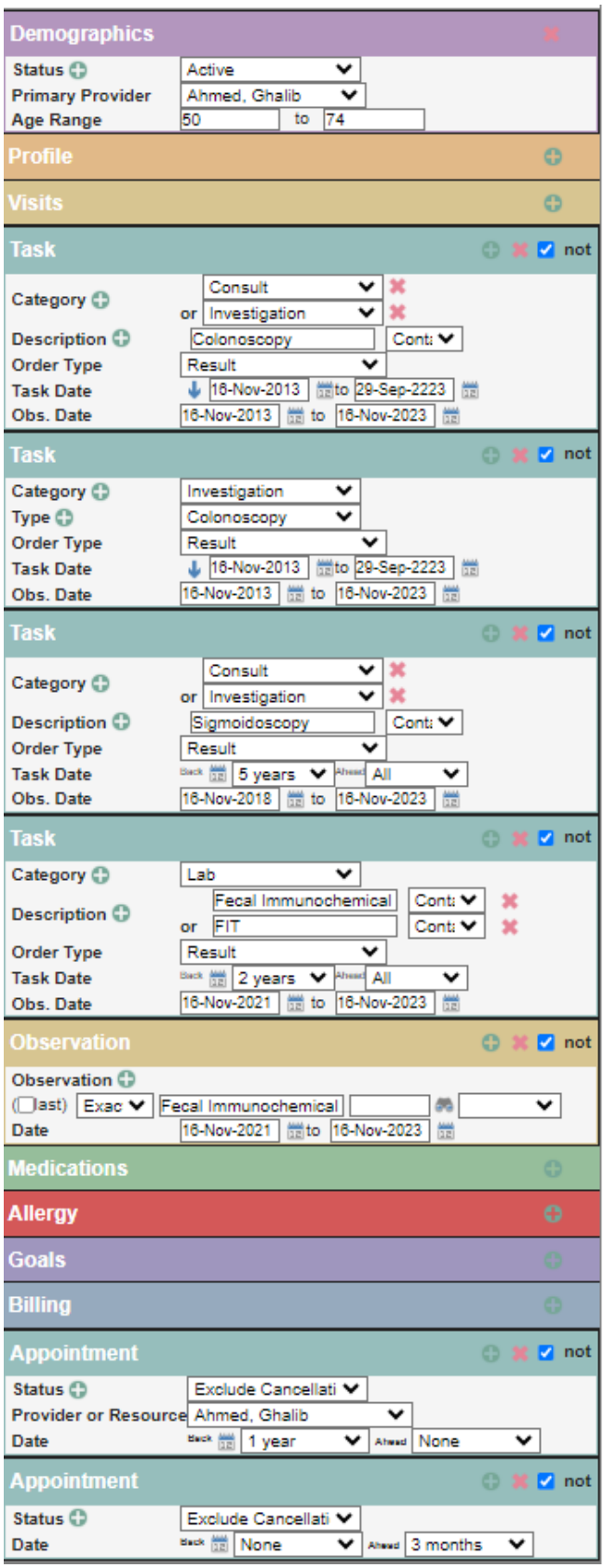
B) ESPCN – Outreach – Mammo Due, No Appt in 1 Year



****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

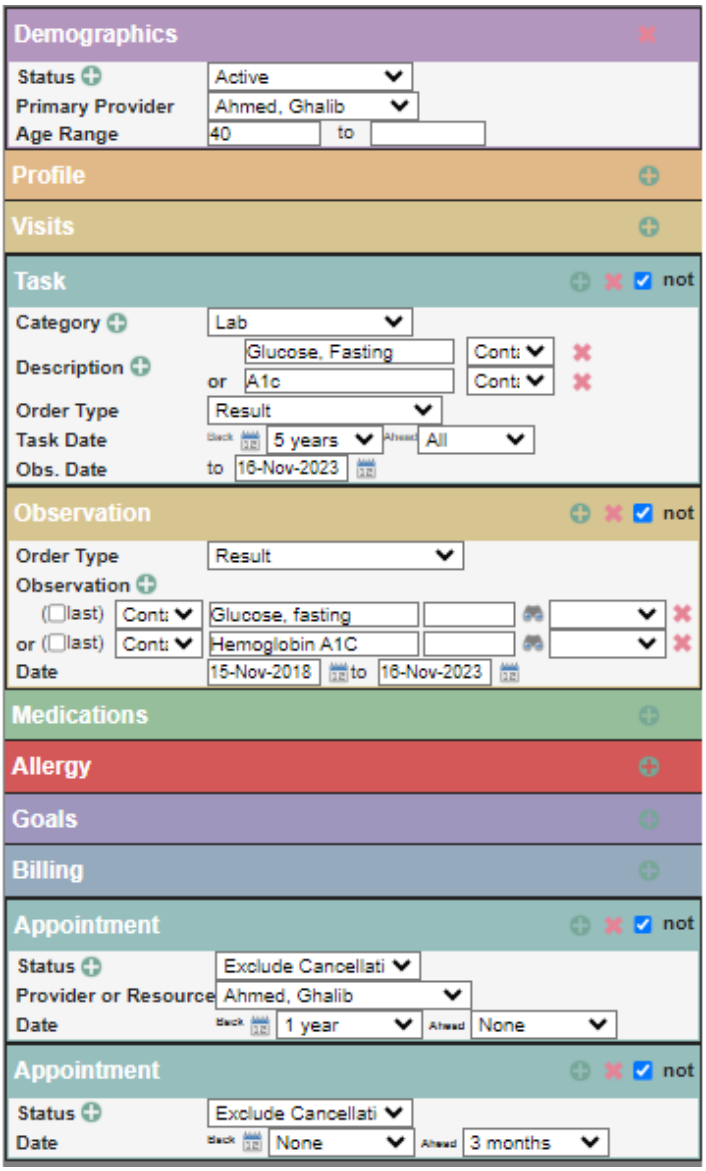
C) ESPCN – Outreach - CRC Due, No Appt in 1 Year



****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

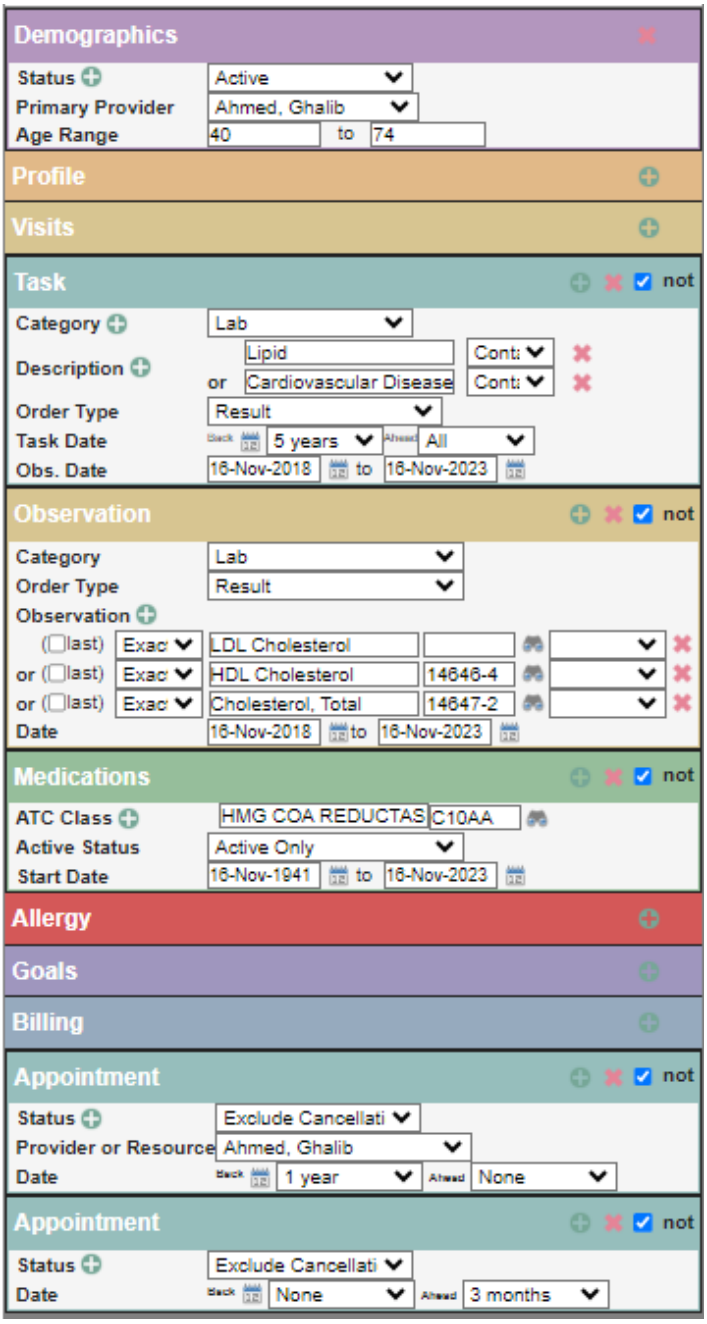
D) ESPCN – Outreach - Diabetes Due, No Appt in 1 Year



****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



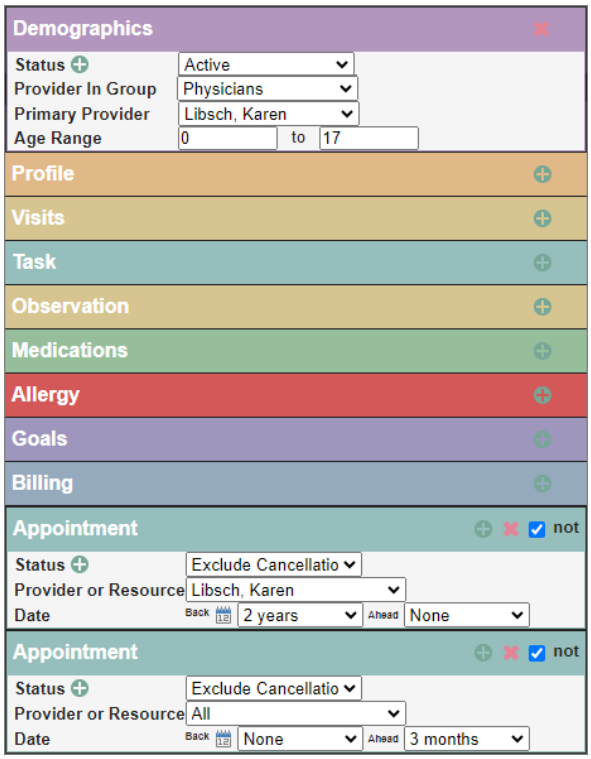
Lipid (contains)

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

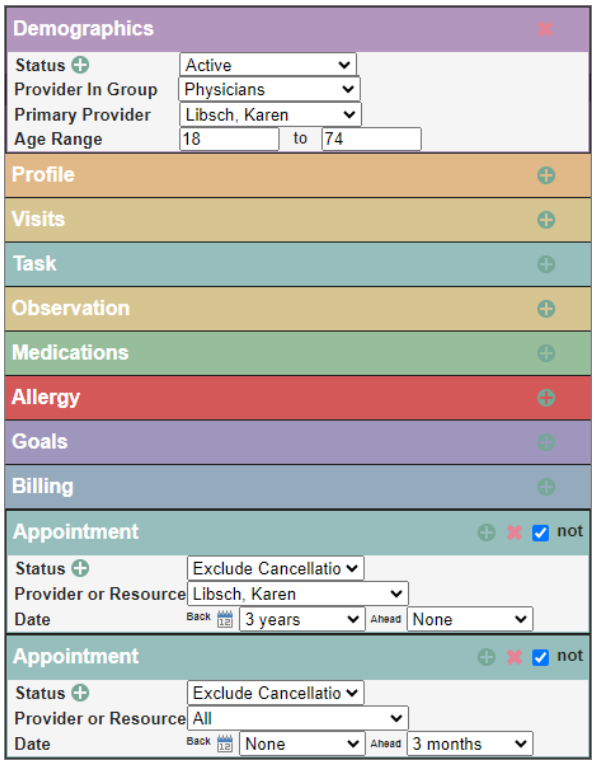
F) ESPCN – Outreach – Pediatrics, No Appt in 2 Years



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

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

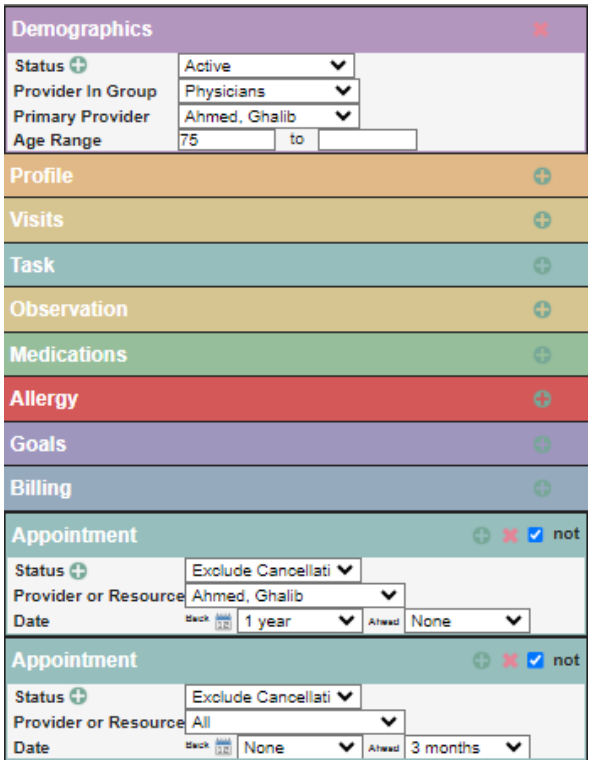
G) ESPCN – Outreach – Adults, No Appt in 3 Years



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

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

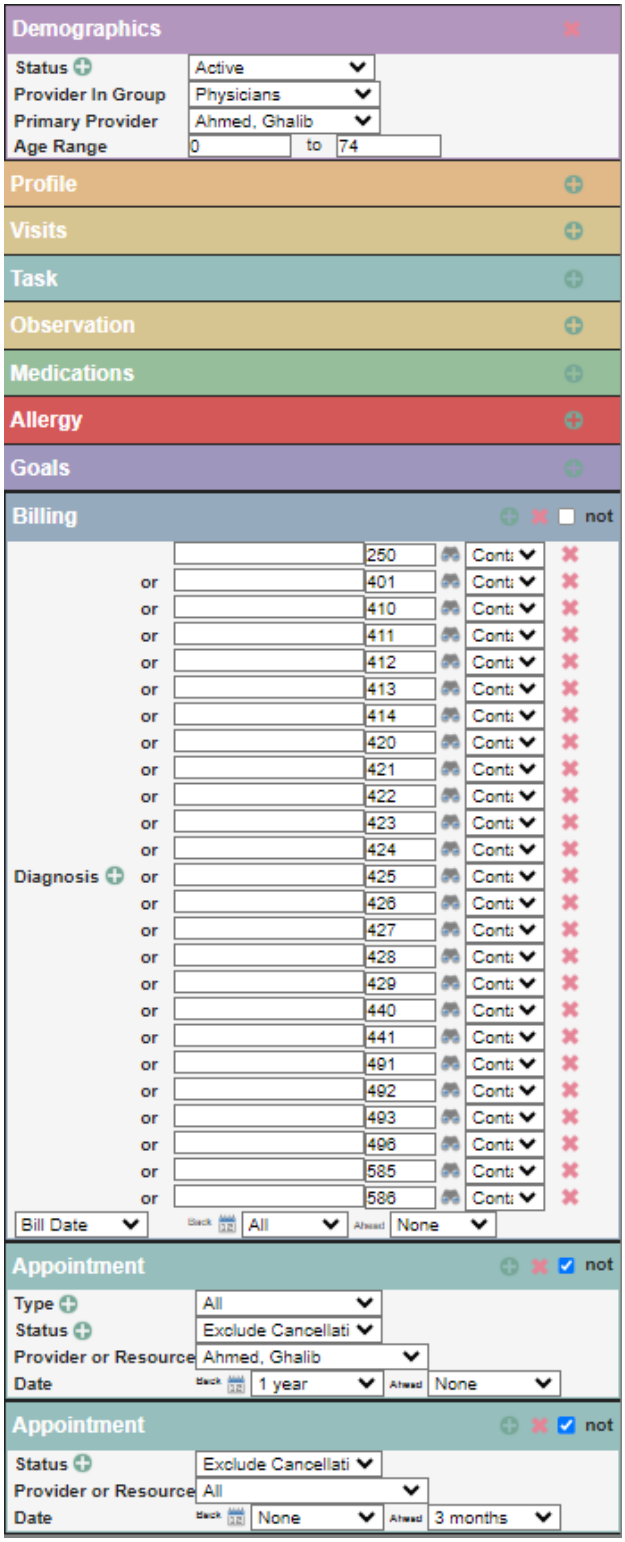
H) ESPCN – Outreach – 75+ No Appt in 1 Year



****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

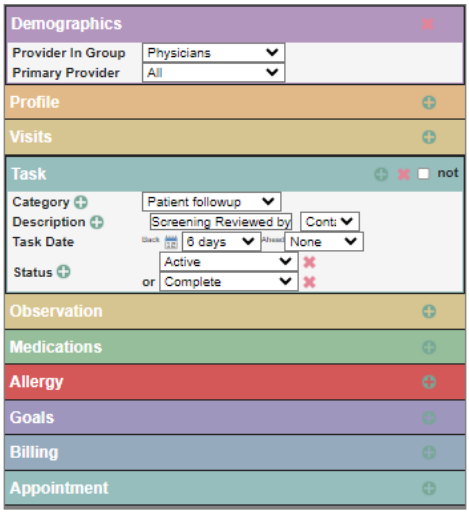


****Create one report per doctor, name as above then note the doctor's name.**

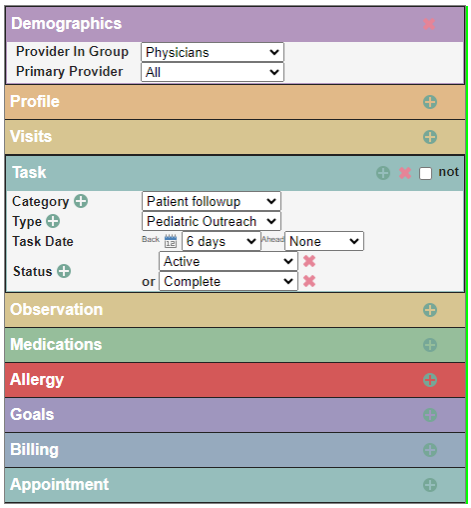
Ex: ESPCN – Outreach – Chronic Disease, No Appt in 1 Year – Ahmed

Weekly Tracking Queries

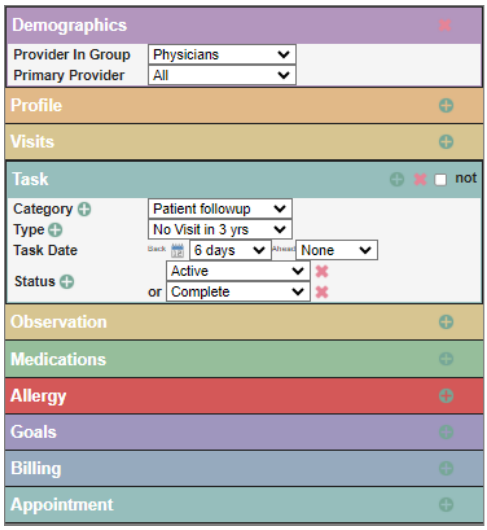
J) ESPCN – Tracking – Screening Reviewed by PCCA



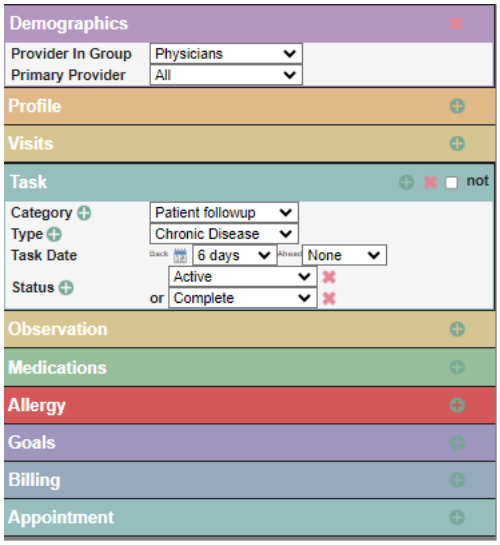
K) ESPCN – Tracking – Pediatrics, 2 Years No Appt Outreach



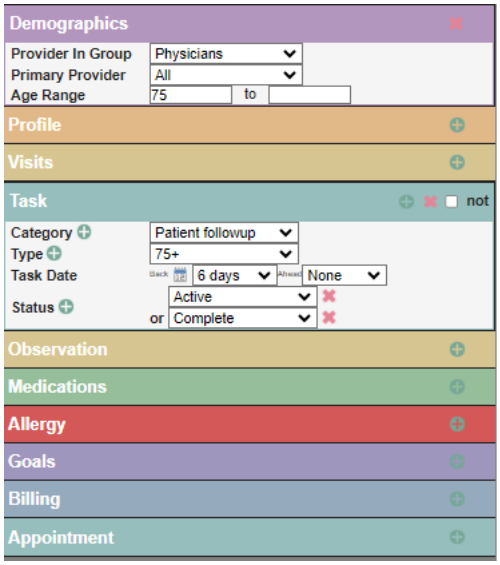
L) ESPCN – Tracking – Adults, 3 Years No Appt Outreach



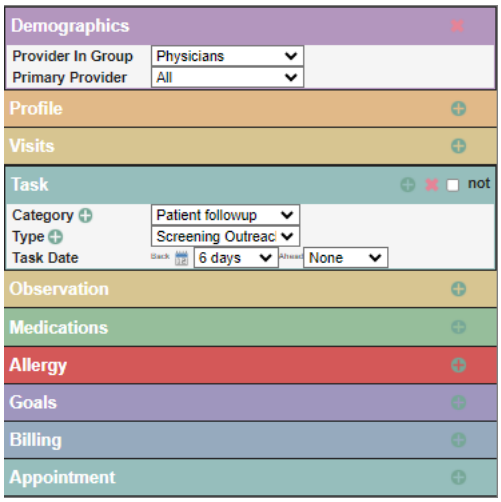
M) ESPCN – Tracking – Chronic Disease Outreach



N) ESPCN – Tracking – 75+ Outreach



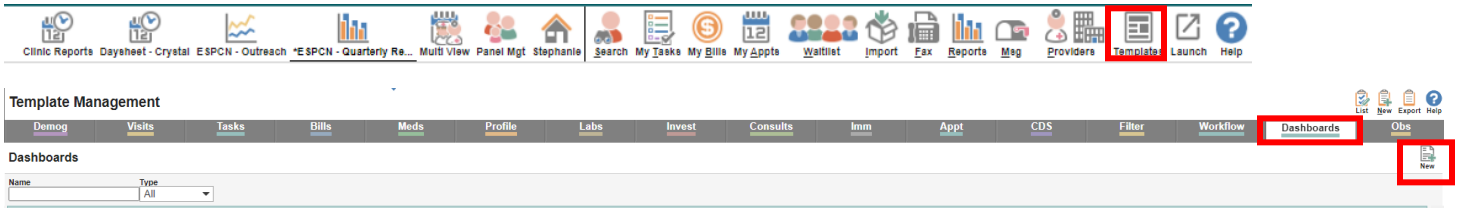
O) ESPCN – Tracking – Screening Outreach



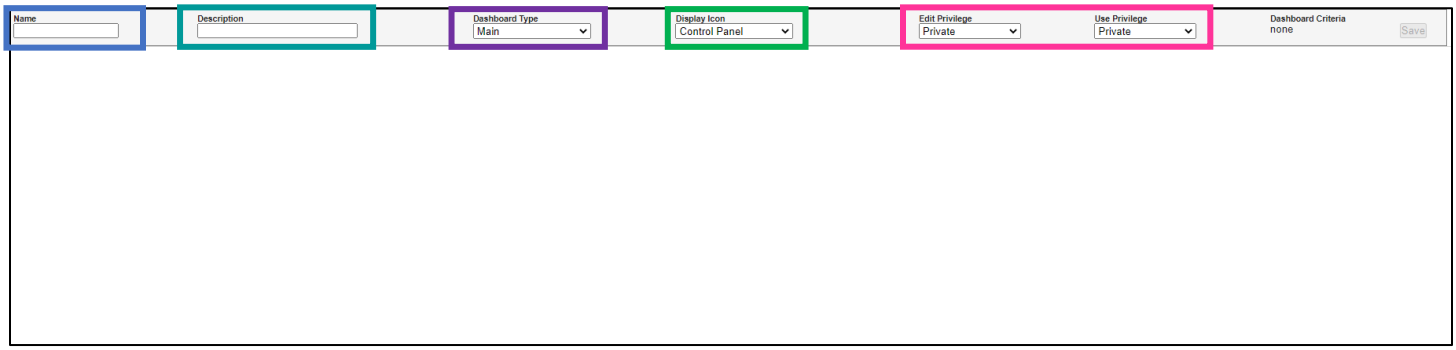
Building Dashboards

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.

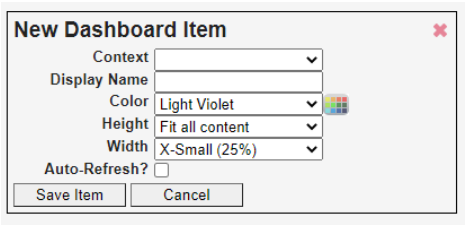
PURPLE: The dashboard type should be Main.

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

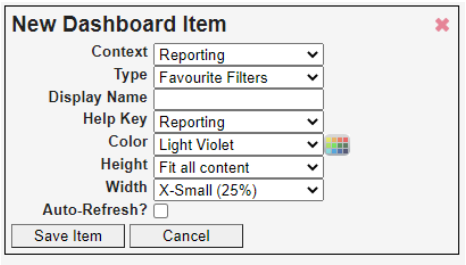
PINK: Set the Edit Privilege and Use Privilege as Private while building the dashboard, then change the use to all users once completed.

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.



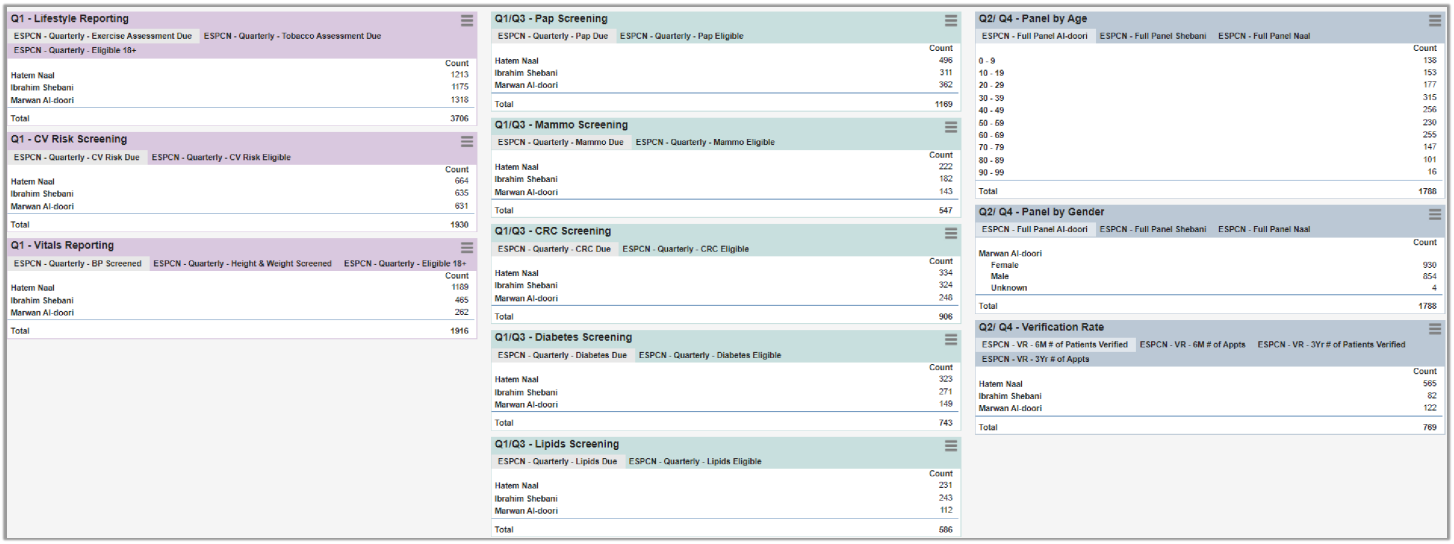
Change the type to statistics. Set the display name for the appropriate heading for the widget Ex: Pap Screening, Screening Outreach. For color, leave them all the standard color that populates, once you have all your widgets created change the color scheme to group the widgets together. *Example: Quarterly 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.

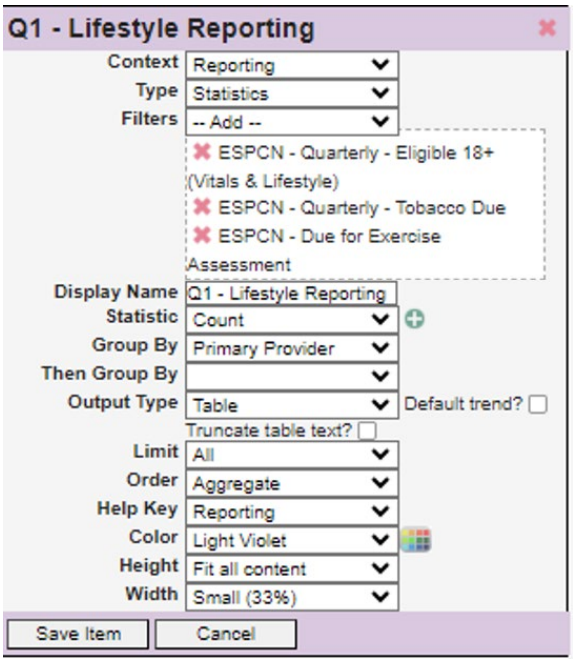
Once you have your widgets sorted in columns, starting at the top, change the width to small for each one.

Quarterly Reporting Dashboard

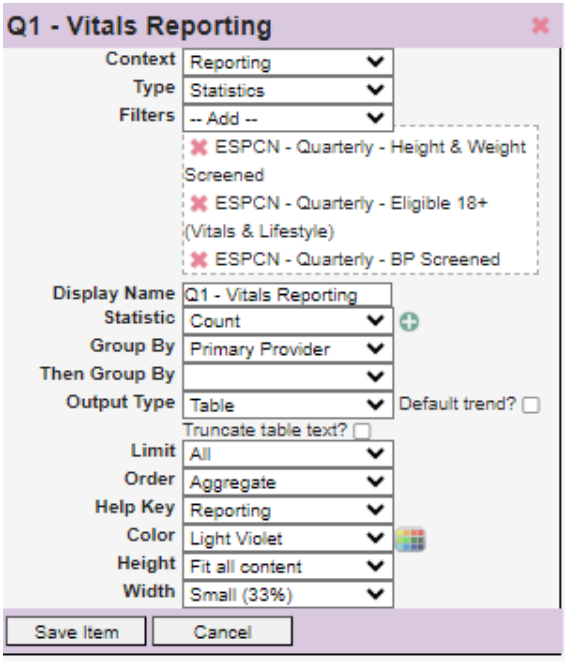


Below is how to set up the widgets.

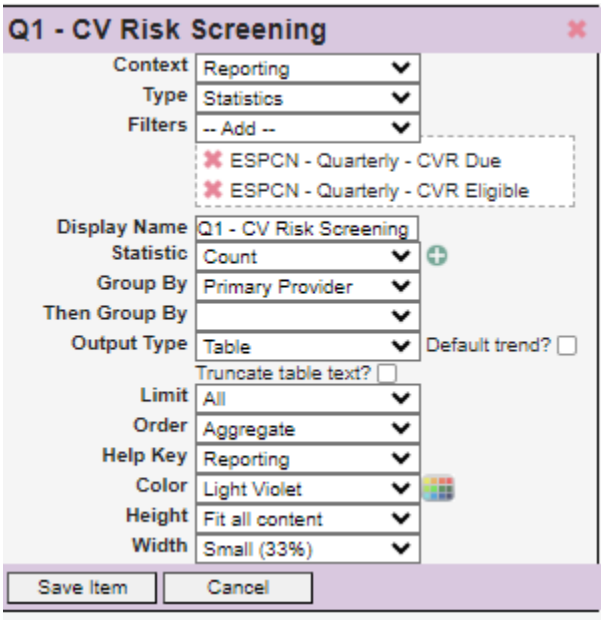
Quarterly Reporting – Q1 - Lifestyle Widget



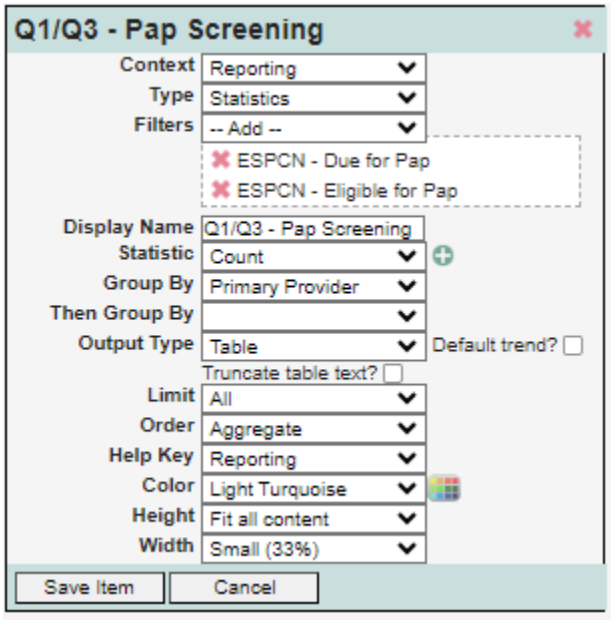
Quarterly Reporting – Q1 – Vitals Widget



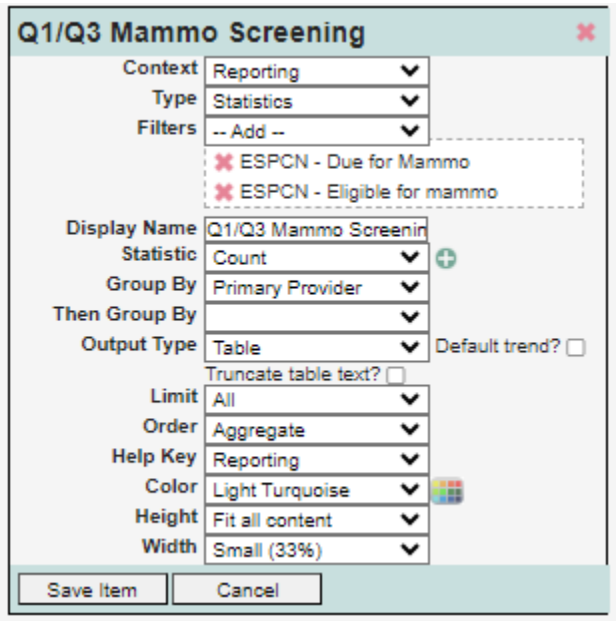
Quarterly Reporting – Q1 – CV Risk Screening Widget



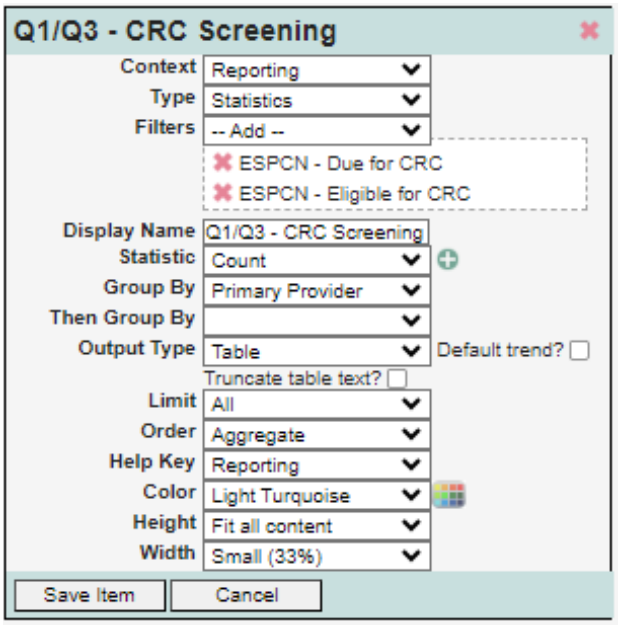
Quarterly Reporting – Q1/Q3 - Pap Widget



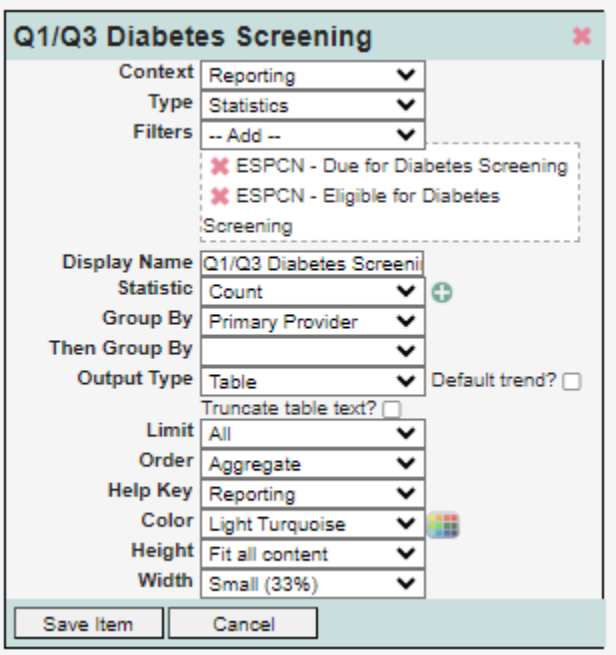
Quarterly Reporting – Q1/Q3 - Mammogram Widget



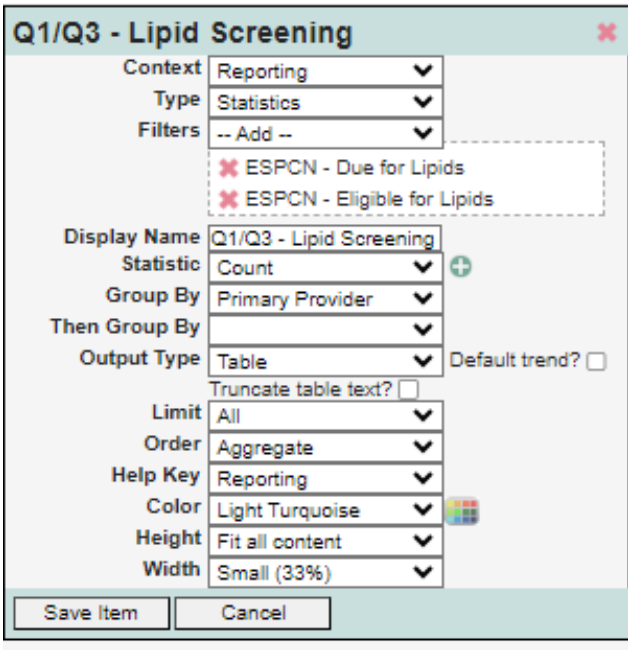
Quarterly Reporting – Q1/Q3 - CRC Widget



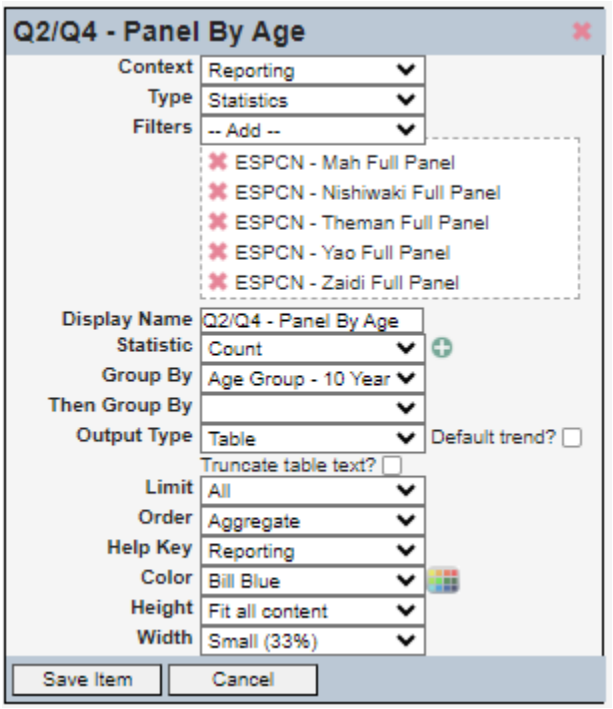
Quarterly Reporting – Q1/Q3 - Diabetes Widget



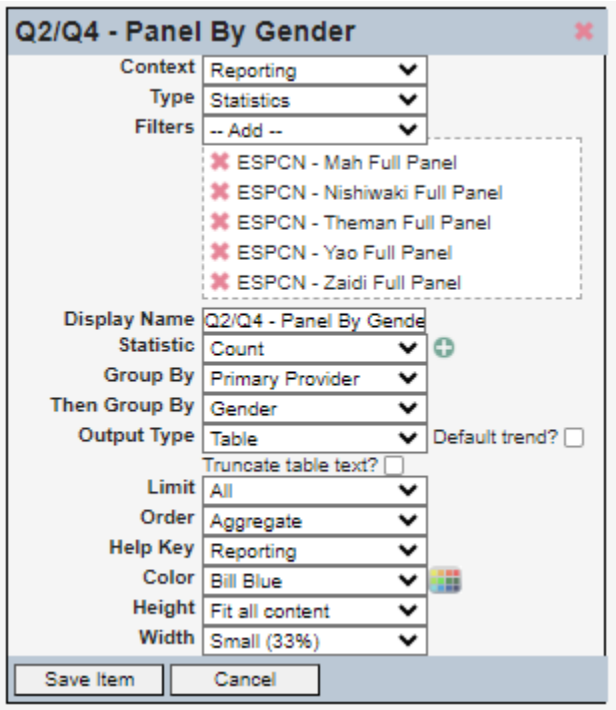
Quarterly Reporting – Q1/Q3 - Lipid Widget



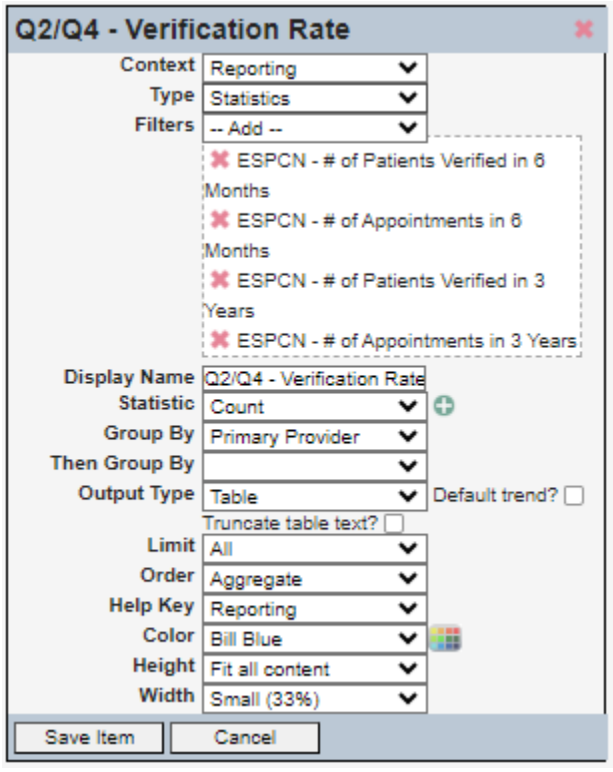
Quarterly Reporting – Q2/Q4 - Panel by Age Widget



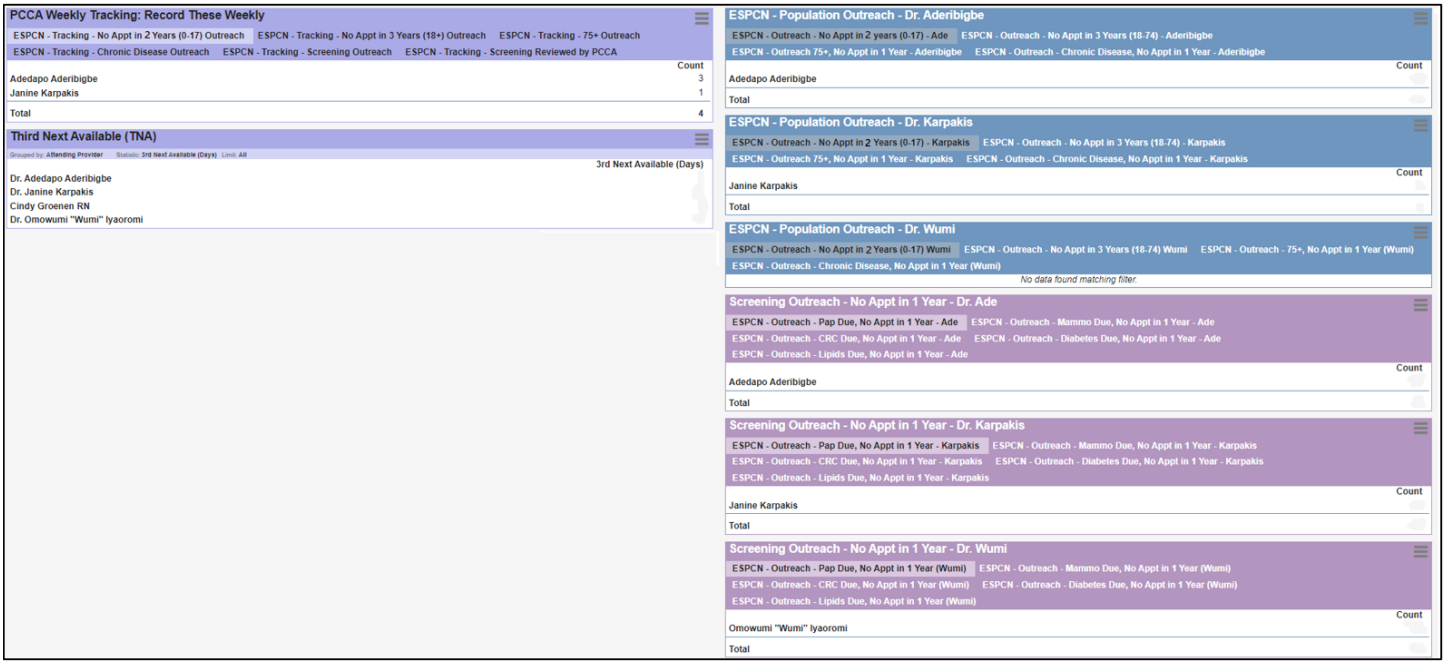
Quarterly Reporting – Q2/Q4 - Panel by Gender Widget



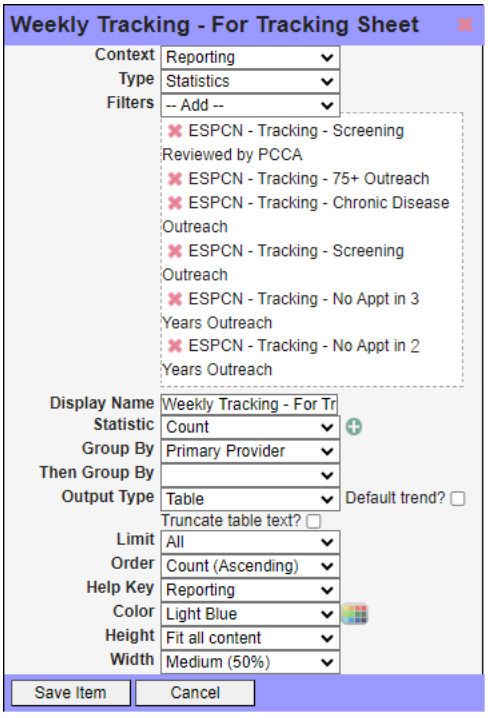
Quarterly Reporting – Q2/Q4 - Verification Rate Widget



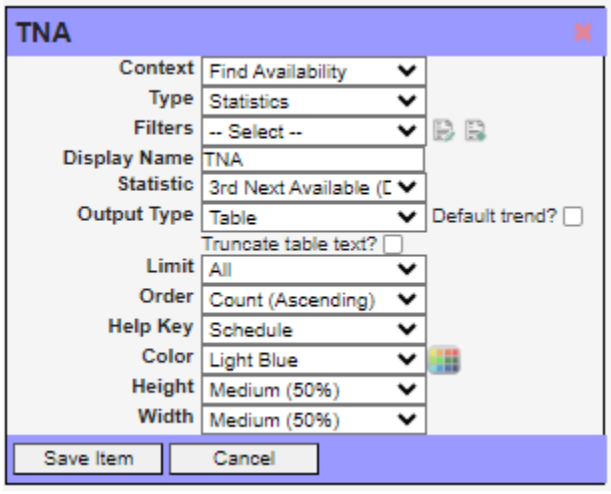
Outreach Dashboard



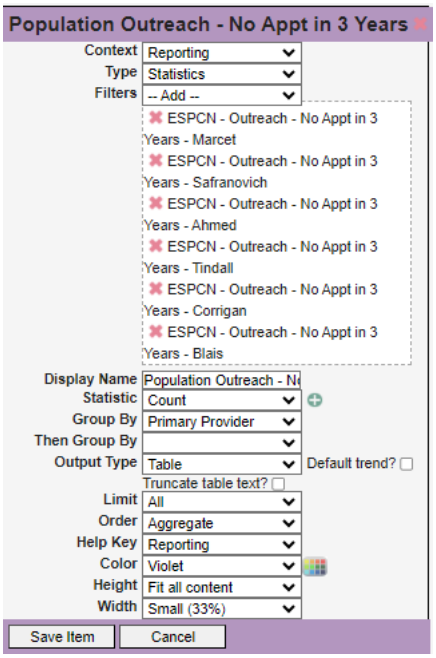
Weekly Tracking – For Tracking Sheet Widget



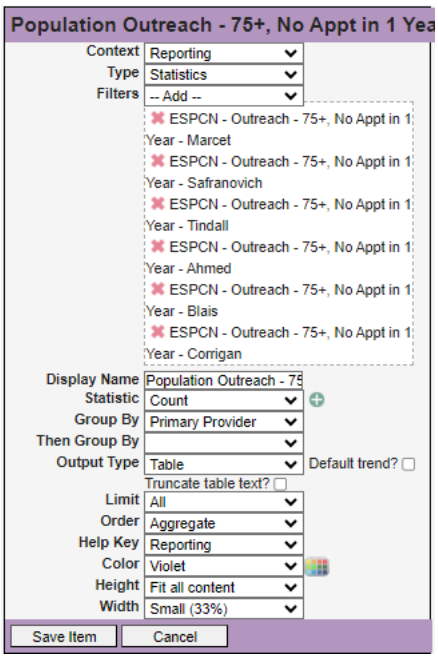
Third Next Available Widget *for how to create the filter, go to [Creating a Third Next Available Filter](#).*



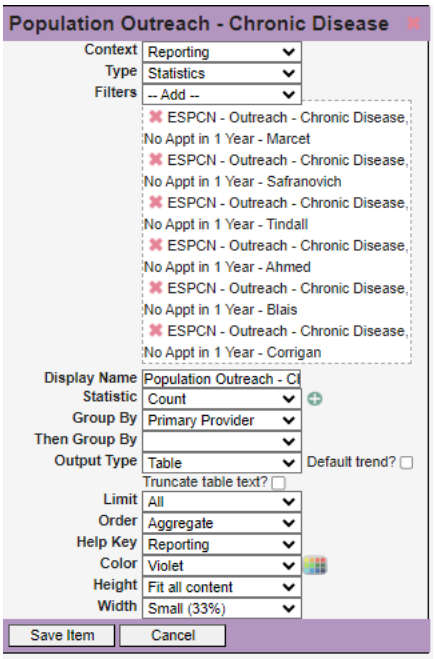
Adults, No Appt 3 Years Outreach Widget



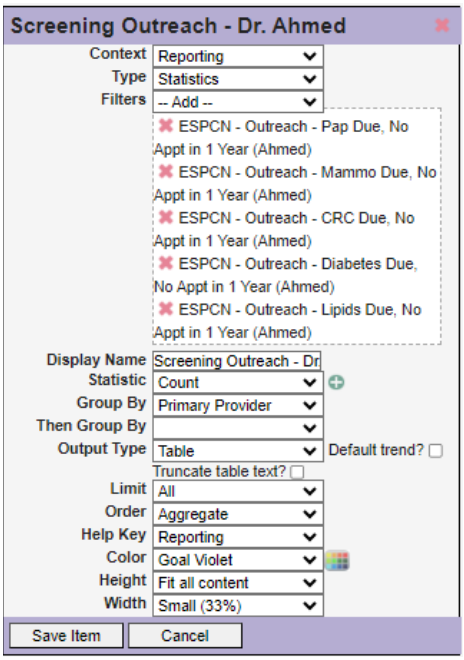
75+ Outreach Widget



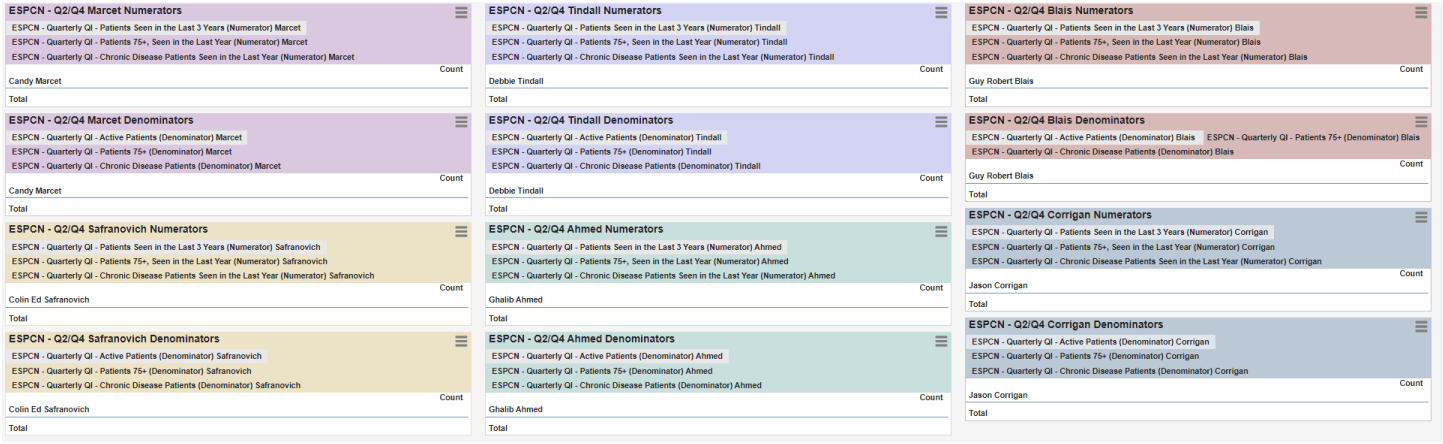
Chronic Disease Outreach Widget



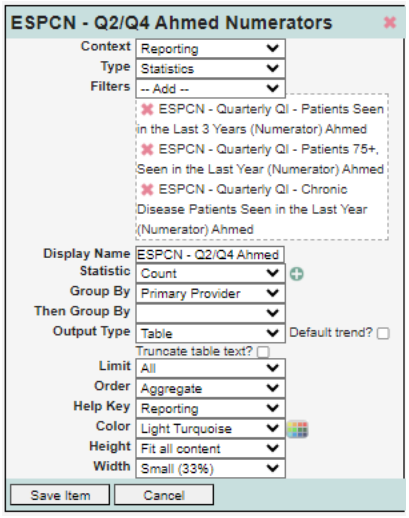
Screening Outreach Widget *(one per Dr.)*

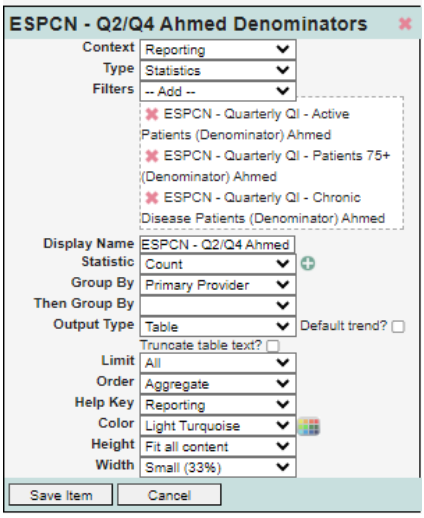


Quarterly QI Dashboard



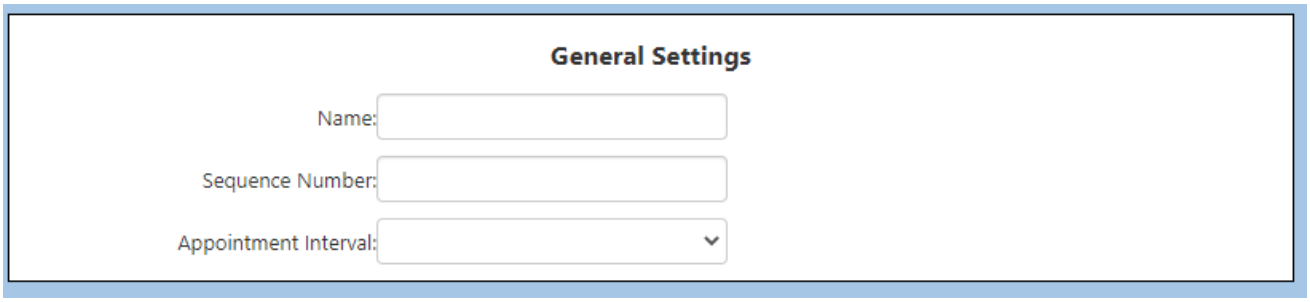
Each physician will require a numerator and denominator widget.



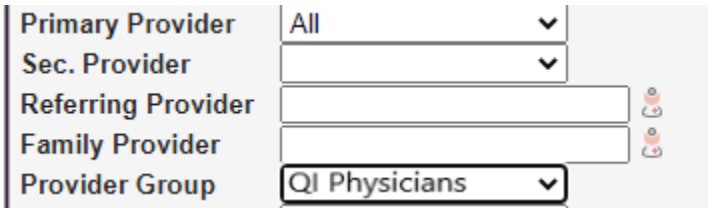


Creating a QI Physicians Group

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



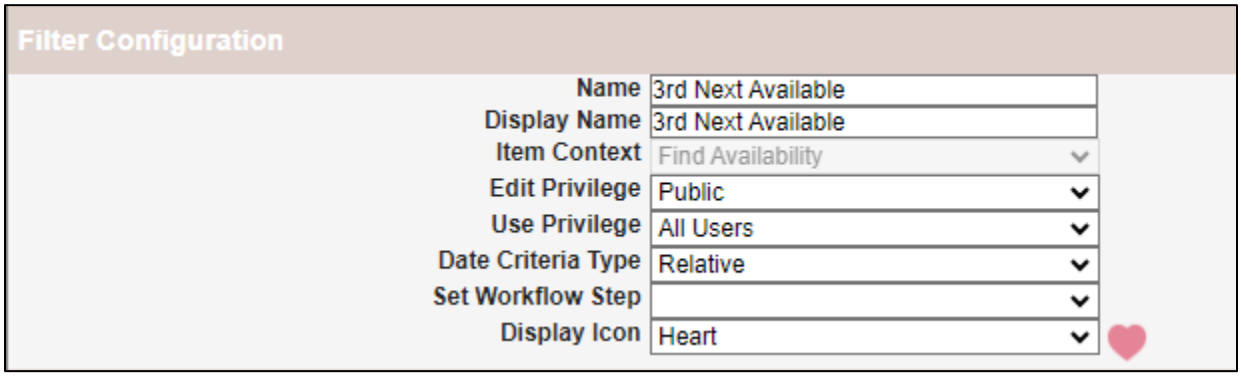
6. Next go over to the Members tab. Add appropriate physicians from the list on the right by clicking the Add Button
7. Once the group is created, you can substitute it in the reports builder by selecting it under the Demographics tab – Provider Group. The default option for Primary Provider will change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



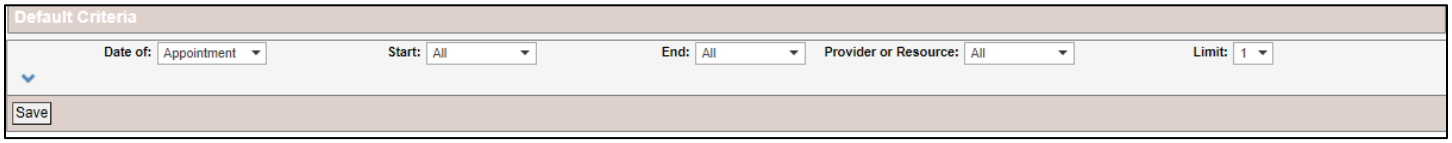
Creating a Third Next Available Filter

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

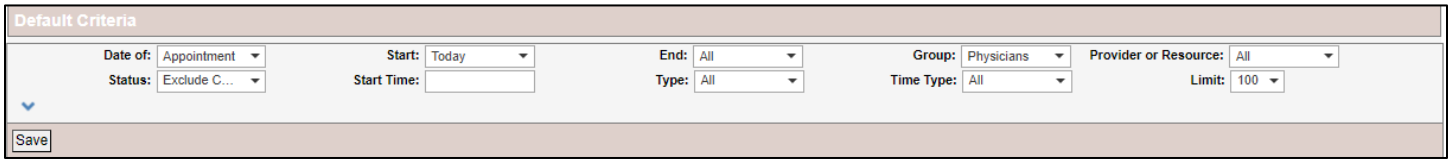
Complete the filter configuration as follows (use whichever display icon you would like):



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:

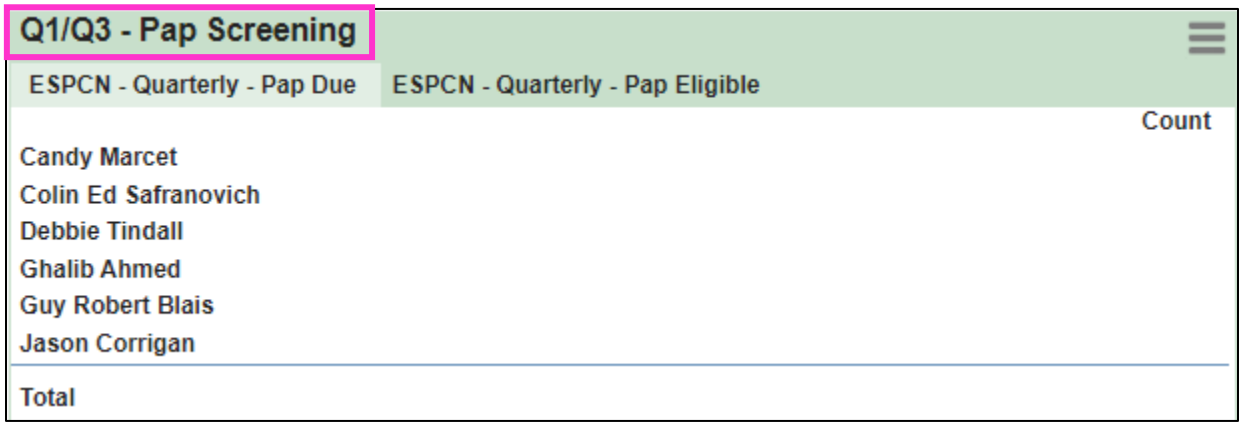


Save once completed. You can now use this to create your Third Next Available Widget.

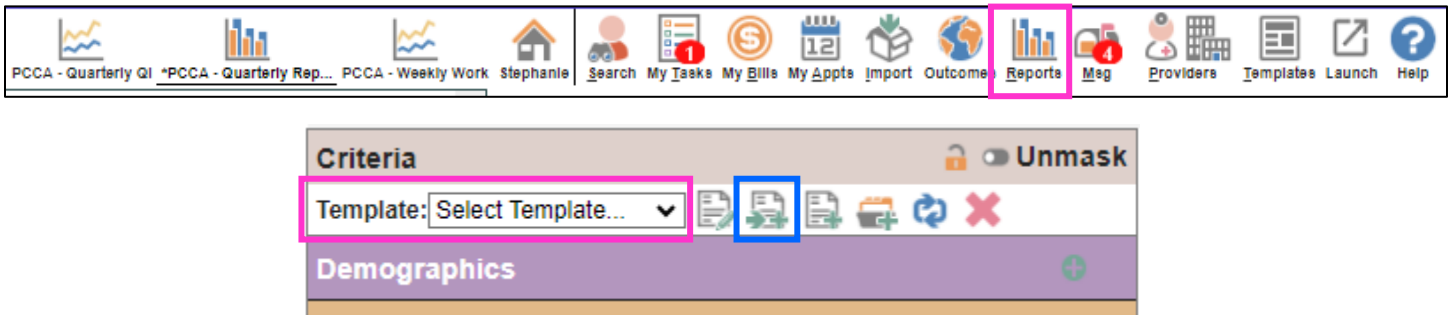
Creating CDS Notifications

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.



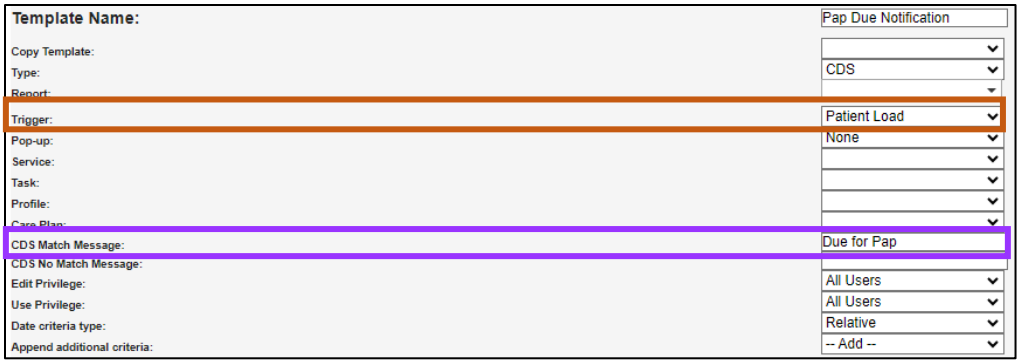
Or



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.

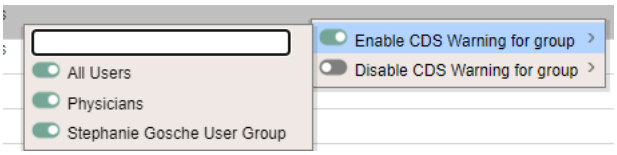
Enter the template name, for example Due for Pap Notification. Set the type as **CDS,** this will cause some additional fields to populate.



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