



Med Access PCCA Setup

Updated October 2024

****Important Notice****

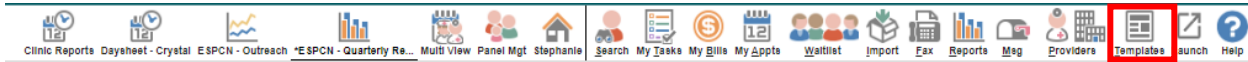
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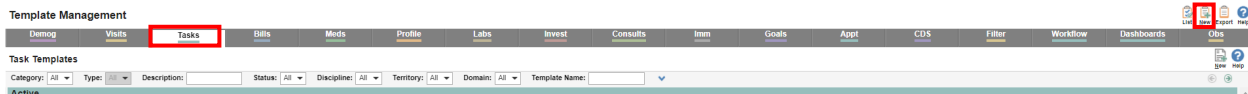
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BUILDING TASK TEMPLATES

Access the Templates menu to open the Template Management Menu.

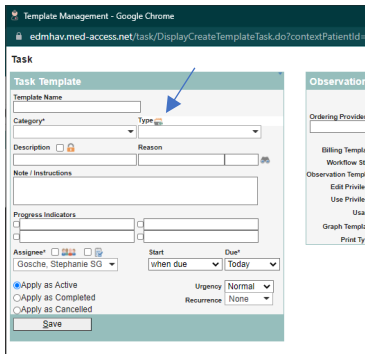


Go to the Tasks tab and select New.



You will need to create a few tasks.

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



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

Name	Use Provider	Full Provider
1yr No Visit Outreach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3yr No Visit Outreach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7yr	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Chronic Disease	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Med Review	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Regulation Visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Screening Outreach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recall to clinic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quasi-clinic visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Confirmation Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Medication	<input type="checkbox"/>	<input type="checkbox"/>
Medication	<input type="checkbox"/>	<input type="checkbox"/>

Screening Reviewed by PCCA

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

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

- Category*:** Patient followup
- Type:** (Dropdown menu)
- Description:** Screening Reviewed by PCCA
- Reason:** (Dropdown menu)
- Note / Instructions:** Enter new note/instructions here
- Progress Indicators:** (Two checkboxes with associated input fields)
- Assignee*:** Gosche, Stephanie
- Start:** 24-Oct-2023
- Due*:** 24-Oct-2023
- Urgency:** Normal
- Recurrence:** None
- Actions:** Update or Forward, Complete this task
- Buttons:** Save, Preview

Patient Outreach

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

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

- Category*:** Patient followup
- Type:** (Dropdown menu)
- Description:** Patient Outreach
- Reason:** (Dropdown menu)
- Note / Instructions:** Enter new note/instructions here
- Progress Indicators:** (Two checkboxes with associated input fields)
- Assignee*:** Gosche, Stephanie
- Start:** 24-Oct-2023
- Due*:** 24-Oct-2023
- Urgency:** Normal
- Recurrence:** None
- Actions:** Update or Forward, Complete this task
- Buttons:** Save, Preview

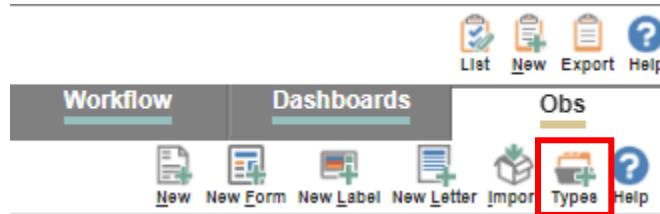
You also need to create task types for adding in results found on Netcare. There are a few steps required to create these task templates. If the clinic is okay with the PCCA importing Mammograms, Colonoscopies and Sigmoidoscopies into the EMR then you do not need to create those additional task templates.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

Adding Result Tasks to Med Access

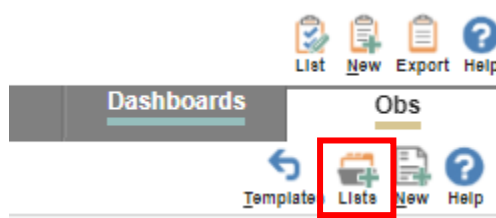
1. Create observations. The observations need to be named the same as what you are trying to capture if the results came in directly to the clinic via e-delivery or the clinics import processes.
2. Create a task template that uses the observations you created.
3. Use a test patient to confirm that the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

FIT Test Results

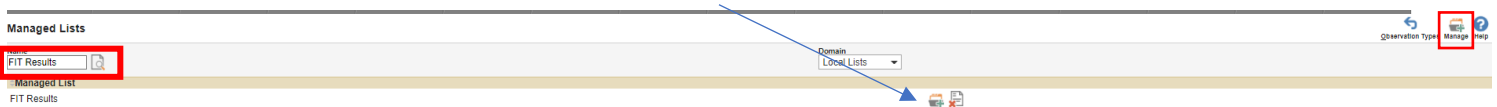
While in the template menu go into Observations (Obs). Select Types so you can create the dropdown results for your lab.



Then select Lists.






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



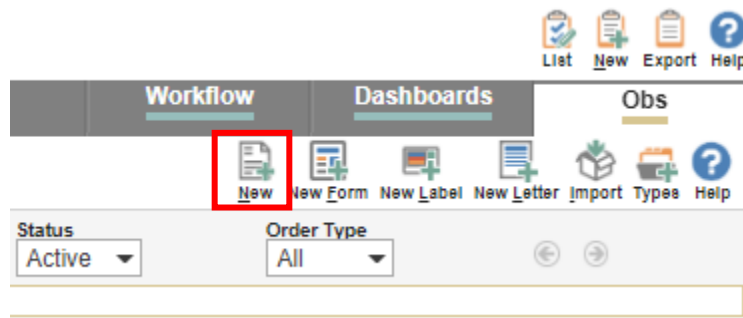
You will then add the items you would like to have appear in your dropdown for your FIT result. In the description field add in Negative and select the add button. Also add in Positive and select the add button. If you need to change the order they appear in, change the numbers in the sort field. If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

The screenshot shows the 'FIT Results Dropdown Management' page. It features a table with columns for Name, Code, Active, and Sort. There are two rows: 'Negative' with code 1906574 and 'Positive' with code 1906575. Both are active and have a sort value of 0. There are also buttons for adding and deleting items.

Name	Code	Active	Sort
Negative	1906574	<input checked="" type="checkbox"/>	0
Positive	1906575	<input checked="" type="checkbox"/>	0

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.

A screenshot of the 'Template Management' window for an 'Observation Template'. The window has a header with 'Name', 'Category', and 'Description' fields. Below these are several dropdown menus: 'Order Type' (set to 'Response'), 'Type', 'Benchmark', 'Print Type' (set to 'Select Print Type...'), 'Edit Privilege' (set to 'All Haven Staff'), 'Use Privilege' (set to 'All Haven Staff'), 'Step', and 'Recipient'. There are also checkboxes for 'Drilldown' and 'Show all pages (Mapped Form)'. At the bottom left is a 'Save' button. At the bottom right, it says 'Creator: Updated: 2022-03-31'.

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.

A screenshot of the 'Observation Type' configuration form. The form has several sections: 'Observation Name' (Fecal Immunochemical Test), 'Data Type' (Dropdown), 'Managed List' (FIT Results), 'Order' (0), and 'Increment'. There are also fields for 'CDS Criteria', 'Instruction/Note', 'Question', 'Units/Format', 'Display Range', 'Lower Range', 'Upper Range', 'Drilldown Template', and 'Default Graph Template'. Below these are sections for 'Name Format (CSS)', 'Value Format (CSS)', 'Disable Comment', 'Validation', 'Mapped Display Field', 'Calculation', 'User Defined Calculation Expression', 'Hide Observation Label', 'Print Type', 'Allergy Classification', 'Parent Flag & ID', 'Use Privilege' (Public), and 'Edit Privilege' (Public). At the bottom left are 'Apply' and 'Save' buttons.

Observation Name: Fecal Immunochemical Test

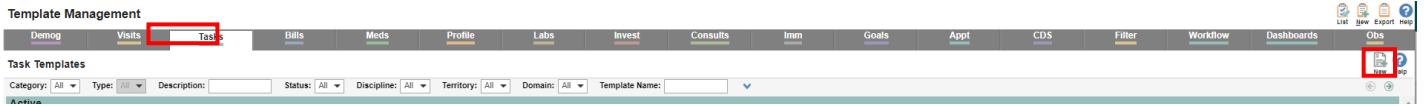
Data Type: Dropdown

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

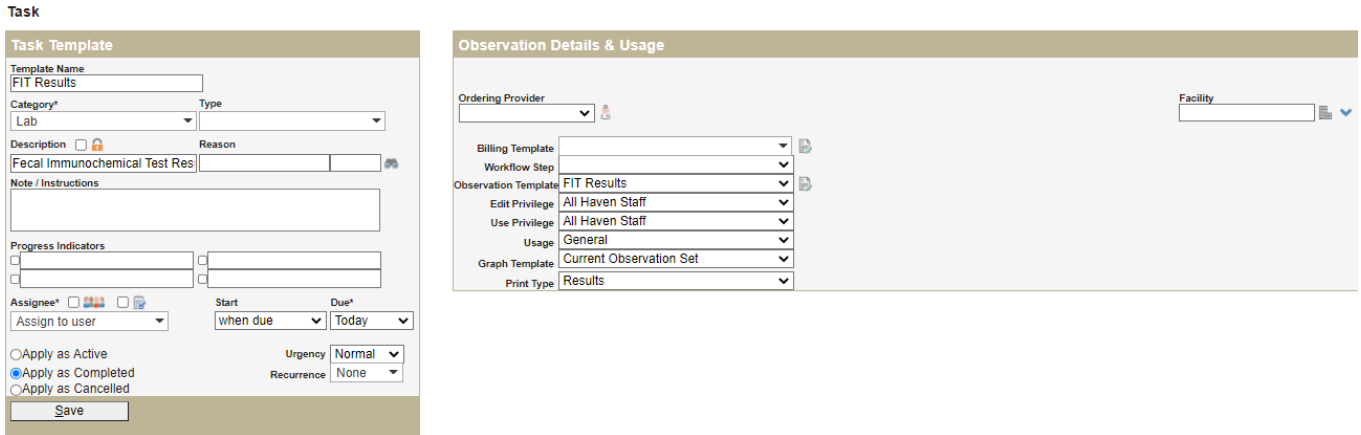
Then click apply.

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:

Observation Template

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

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

Edit Privilege: All Users
Use Privilege: All Users
Recipient:
Creator: Reay, Samantha
Updated: 2021-05-07

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

Save

Observation Type

Observation Name: Glucose, Fasting
Data Type: Numeric
Managed List:
Order: 1
Increment:
Code: 14771-0
Default Graph Template: *Diabetes Monitoring
Fasting Glucose, Glucose Fasting

Name Format (CSS):
Value Format (CSS):
Use Privilege: Public
Edit Privilege: Public

Apply Save

Observation Type

Observation Name: Hemoglobin A1c
Data Type: Numeric
Managed List:
Order: 1
Increment:
Code: 4548-4
Default Graph Template: *Diabetes Monitoring
a1c, hemoglobin a1c/total hemoglobin

Name Format (CSS):
Value Format (CSS):
Use Privilege: Public
Edit Privilege: Public

Apply Save

For the task template:

Task Template

Template Name: Diabetes Results

Category: Lab Type: Lab Results

Description: [[Glucose, Fasting]][Hemoglobin A1c] Reason: per Netcare, Dr.

Note / Instructions:

Progress Indicators:

Assignee: Assign to user 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: Diabetes Results

Edit Privilege: All Users Use Privilege: All Users Usage: General

Graph Template: Current Observation Set Print Type: Default Task

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

Lipid Screening

For the observations:

Observation Template

Name: Lipid Panel Category: Lab Order Type: Response

Description: Lipid Panel

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Cholesterol			1			14647	
HDL Cholesterol			1			14646	
LDL Cholesterol			2			39469	
Triglycerides	mmol/L < 2.0		810				

Save

Observation Type

Observation Name: Cholesterol Data Type: Numeric

Code: 14647-2

Default Graph Template: *Lipid Panel

Value Format (CSS):

Apply Save

Observation Type

Observation Name: HDL Cholesterol
Data Type: Numeric
Managed List: [dropdown]
Order: 1
Increment: [input]
CDS Criteria: [dropdown]
Instruction/Note: [text area]
Question: [text area]
Units/Format: [input]
Display Range: [input]
Lower Range: [input]
Upper Range: [input]
Drilldown Template: [dropdown]
Default Graph Template: *Lipid Panel
System: [dropdown]
Code: 14646-4
Name Format (CSS): [checkboxes]
Value Format (CSS): [checkboxes]
Disable Comment: [checkbox]
Validation: [dropdown]
Mapped Display Field: [dropdown]
Calculation: [dropdown]
User Defined Calculation Expression: [text area]
Apply Save: [input]

Observation Type

Observation Name: LDL Cholesterol
Data Type: Numeric
Managed List: [dropdown]
Order: 2
Increment: [input]
CDS Criteria: [dropdown]
Instruction/Note: [text area]
Question: [text area]
Units/Format: [input]
Display Range: [input]
Lower Range: [input]
Upper Range: [input]
Drilldown Template: [dropdown]
Default Graph Template: *Lipid Panel
System: [dropdown]
Code: 39469-2
Name Format (CSS): [checkboxes]
Value Format (CSS): [checkboxes]
Disable Comment: [checkbox]
Validation: [dropdown]
Mapped Display Field: [dropdown]
Calculation: [dropdown]
User Defined Calculation Expression: [text area]
Apply Save: [input]

Observation Type

Observation Name: Triglycerides
Data Type: Numeric
Managed List: [dropdown]
Order: 40
Increment: [input]
CDS Criteria: [dropdown]
Instruction/Note: [text area]
Question: [text area]
Units/Format: mmol/L
Display Range: 0.00-1.70
Lower Range: [input]
Upper Range: [input]
Drilldown Template: [dropdown]
Default Graph Template: *Lipid Panel
System: [dropdown]
Code: [input]
Name Format (CSS): [checkboxes]
Value Format (CSS): [checkboxes]
Disable Comment: [checkbox]
Validation: [dropdown]
Mapped Display Field: [dropdown]
Calculation: [dropdown]
User Defined Calculation Expression: [text area]
Apply Save: [input]

For the task template:

Task Template

Template Name:

Category*: Type:

Description: Reason:

Note / Instructions:

Progress Indicators:

Assignee*: Start: Due*:

Last Update: Stephanie Gosche

Apply as Active Urgency:

Apply as Completed Recurrence:

Apply as Cancelled

Observation Details & Usage

Ordering Provider:

Facility:

Billing Template:

Workflow Step:

Observation Template:

Edit Privilege:

Use Privilege:

Usage:

Graph Template:

Print Type:

Pap Test Results

For the observations:

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

Pap Results Dropdown Management

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

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

For the observation template:

Observation Template

Name: Order Type: Edit Privilege: Drilldown:

Category: Type: Use Privilege: Show all pages (Mapped Form):

Copy: Description: Step: Recipient: Creator: Reay, Samantha
Updated: 2022-04-01

Print Type:

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Gynecological Cytology	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Observation Type

Observation Name: Data Type: Managed List: Order: 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)

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:

User Defined Calculation Expression:

Apply Save:

For the task template:

Task Template

Template Name:

Category*: Type:

Description: Reason:

Note / Instructions:

Progress Indicators:

Assignee*: Start: Due*:

Last Update: Stephanie Gosche

Apply as Active Apply as Completed Apply as Cancelled

Urgency: Recurrence:

Observation Details & Usage

Ordering Provider: Facility:

Billing Template:

Workflow Step:

Observation Template:

Edit Privilege:

Use Privilege:

Usage:

Graph Template:

Print Type:

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		Description	Code	Use Privilege	Edit Privilege			
BIRADS Dropdown		<input type="text"/>	<input type="text"/>	Public	Public	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	Code	Active	Sort					
BIRADS 0	2064405	<input checked="" type="checkbox"/>	<input type="text" value="0"/>					
BIRADS 1	2064406	<input checked="" type="checkbox"/>	<input type="text" value="0"/>					
BIRADS 2	2064407	<input checked="" type="checkbox"/>	<input type="text" value="0"/>					
BIRADS 3	2064408	<input checked="" type="checkbox"/>	<input type="text" value="0"/>					
BIRADS 4	2064409	<input checked="" type="checkbox"/>	<input type="text" value="0"/>					
BIRADS 5	2064410	<input checked="" type="checkbox"/>	<input type="text" value="0"/>					
BIRADS 6	2064411	<input checked="" type="checkbox"/>	<input type="text" value="0"/>					

Export options: [Excel](#) | [PDF](#) | [RTF](#)

Radiologists Suggested Follow Up Dropdown Management

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

Table		Description	Code	Use Privilege	Edit Privilege			
Radiologists Suggested Follow Up Dropdown		<input type="text"/>	<input type="text"/>	Public	Public	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	Code	Active	Sort					
Immediate - More Investigations Required	2064397	<input checked="" type="checkbox"/>	<input type="text" value="10"/>					
3 Months	2064398	<input checked="" type="checkbox"/>	<input type="text" value="20"/>					
6 Months	2064399	<input checked="" type="checkbox"/>	<input type="text" value="30"/>					
1 Year	2064400	<input checked="" type="checkbox"/>	<input type="text" value="40"/>					
1-2 Years	2064401	<input checked="" type="checkbox"/>	<input type="text" value="50"/>					
2 Years - Routine	2064402	<input checked="" type="checkbox"/>	<input type="text" value="60"/>					
Discontinue Screening	2064403	<input checked="" type="checkbox"/>	<input type="text" value="70"/>					
None	2064404	<input checked="" type="checkbox"/>	<input type="text" value="80"/>					

Export options: [Excel](#) | [PDF](#) | [RTF](#)

For the observation template:

Template Management

Observation Template

Name: Mammogram Results
 Category: Investigation
 Order Type: Response
 Type: Mammogram
 Edit Privilege: All Haven Staff
 Use Privilege: All Haven Staff
 Benchmark:
 Step:
 Recipient:
 Print Type: Select Print Type...
 Creator: Gosche, Stephanie SG
 Updated: 2022-03-24

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Mammogram Results			10				□□□□□□□□
Radiologist Suggested Fo			20				□□□□□□□□

Save

Observation Type

Observation Name: Mammogram Results
 Data Type: Dropdown
 Managed List: Mammo Results
 Order: 0
 Increment:
 CDS Criteria:
 Instruction/Note:
 Question:
 Units/Format:
 Display Range:
 Lower Range:
 Upper Range:
 Drilldown Template:
 Default Graph Template:
 System:
 Code:
 Name Format (CSS):
 Value Format (CSS):
 Disable Comment:
 Validation:
 Mapped Display Field:
 Calculation:
 User Defined Calculation Expression:
 Hide Observation Label:
 Print Type:
 Allergy Classification:
 Parent Flag & ID:
 Use Privilege: Public
 Edit Privilege: Public
 Auto Invoke Drilldown:
 Don't Display Value in History:
 Allow Overflow:
 Apply Save

Observation Type

Observation Name: Radiologist Suggested Follow Up
 Data Type: Dropdown
 Managed List: Radiologist Suggested Fol
 Order: 20
 Increment:
 CDS Criteria:
 Instruction/Note:
 Question:
 Units/Format:
 Display Range:
 Lower Range:
 Upper Range:
 Drilldown Template:
 Default Graph Template:
 System:
 Code:
 Name Format (CSS):
 Value Format (CSS):
 Disable Comment:
 Validation:
 Mapped Display Field:
 Calculation:
 User Defined Calculation Expression:
 Hide Observation Label:
 Print Type:
 Allergy Classification:
 Parent Flag & ID:
 Use Privilege: Public
 Edit Privilege: Public
 Auto Invoke Drilldown:
 Don't Display Value in History:
 Allow Overflow:
 Apply Save

For the task template:

<p>Task Template</p> <p>Template Name: Mammogram Results Category: Investigation Type: Mammogram Description: Mammogram Reason: as 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 Save</p>	<p>Observation Details & Usage</p> <p>Ordering Provider: Facility: Billing Template: Workflow Step: Observation Template: Mammo Results Edit Privilege: All Users Use Privilege: All Users Usage: General Graph Template: Current Observation Set Print Type: Default Task</p>
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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:

Name	Code	Active	Sort
<1 Year	1970852	<input checked="" type="checkbox"/>	1
1 Year	1970854	<input checked="" type="checkbox"/>	2
2 Years	1970855	<input checked="" type="checkbox"/>	3
3 Years	1970856	<input checked="" type="checkbox"/>	4
3-5 Years	1970857	<input checked="" type="checkbox"/>	5
5 Years	1970858	<input checked="" type="checkbox"/>	6
5-7 Years	1970859	<input checked="" type="checkbox"/>	7
10 Years	1970860	<input checked="" type="checkbox"/>	8
Discontinue Screening	1970861	<input checked="" type="checkbox"/>	9
Return to FIT Screening	1970862	<input checked="" type="checkbox"/>	10

For the observation template:

Observation Template

Name: ESPCN - Colonoscopy Re
 Category: Consult
 Order Type: Response
 Type:
 Benchmark:
 Print Type: Select Print Type...
 Edit Privilege: All Users
 Use Privilege: All Users
 Step:
 Recipient:
 Creator: Moley, Gabriel OM
 Updated: 2021-11-30

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Colonoscopy Report			0				<input type="checkbox"/>
Surgeon Completed			1				<input type="checkbox"/>
Recommended Follow up			5				<input type="checkbox"/>
Additional Notes			10				<input type="checkbox"/>

Save

Observation Type

Observation Name
 Colonoscopy Report

Data Type
 Title

Managed List:
 Order: 0
 Increment:
 Question:
 Default Graph Template:
 Synonyms:
 Name Format (CSS):
 Value Format (CSS):
 Disable Comment:
 Validation:
 Mapped Display Field:
 Calculation:
 User Defined Calculation Expression:
 Hide Observation Label:
 Print Type:
 Allergy Classification:
 Parent Flag & ID:
 Enable add-on usage:
 Use Privilege:
 Auto Invoke Drilldown:
 Edit Privilege:
 Don't Display Value in History:
 Allow Overflow:

Apply Save

Observation Type

Observation Name
Surgeon Completed

Data Type
Provider

Managed List

Order
1

Increment

Instruction/Note

Question

Units/Format

Display Range

Lower Range

Upper Range

Drilldown Template

Default Graph Template

System

Code

Synonyms

Name Format (CSS)

Value Format (CSS)

Disable Comment

Enable add-on usage

Auto Invoke Drilldown

Don't Display Value in History

Allow Overflow

Validation

Print Type

Hide Observation Label

Allergy Classification

Mapped Display Field

Parent Flag & ID

Use Privilege

Edit Privilege

Calculation

User Defined Calculation Expression

Apply Save

Observation Type

Observation Name
Recommended Follow up

Data Type
Dropdown

Managed List
Follow up: Colonoscopy

Order
5

Increment

Instruction/Note

Question

Units/Format

Display Range

Lower Range

Upper Range

Drilldown Template

Default Graph Template

System

Code

Synonyms

Name Format (CSS)

Value Format (CSS)

Disable Comment

Enable add-on usage

Auto Invoke Drilldown

Don't Display Value in History

Allow Overflow

Validation

Print Type

Hide Observation Label

Allergy Classification

Mapped Display Field

Parent Flag & ID

Use Privilege

Edit Privilege

Calculation

User Defined Calculation Expression

Apply Save

Observation Type

Observation Name
Additional Notes

Data Type
Text Box

Managed List

Order
10

Increment

Instruction/Note

Question

Units/Format

Display Range

Lower Range

Upper Range

Drilldown Template

Default Graph Template

System

Code

Synonyms

Name Format (CSS)

Value Format (CSS)

Disable Comment

Enable add-on usage

Auto Invoke Drilldown

Don't Display Value in History

Allow Overflow

Validation

Print Type

Hide Observation Label

Allergy Classification

Mapped Display Field

Parent Flag & ID

Use Privilege

Edit Privilege

Calculation

User Defined Calculation Expression

Apply Save

For the task template:

Task Template

Template Name
Colonoscopy Results

Category* Type
Consult ▼

Description Reason
Colonoscopy as per Netcare, Dr. 🔗

Note / Instructions

Progress Indicators

Assignee* Start Due*
Assign to user when due Today

Last Update: Stephanie Gosche

Apply as Active Urgency Normal ▼

Apply as Completed Recurrence None ▼

Apply as Cancelled

Observation Details & Usage

Ordering Provider Service Provider
▼ ▼

Billing Template 🔗
Workflow Step ▼

Observation Template 🔗
Edit Privilege All Users ▼

Use Privilege All Users ▼
Usage General ▼

Graph Template Current Observation Set ▼
Print Type Default Task ▼

Sigmoidoscopy Results

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

For the Managed List:

Table: Sigmoidoscopy Follow Up Dropdown

Name	Code	Use Privilege	Active	Sort
1 Year	1906593	Public	<input checked="" type="checkbox"/>	0
2 Years	1906594	Public	<input checked="" type="checkbox"/>	0
3 Years	1906595	Public	<input checked="" type="checkbox"/>	0
4 Years	1906596	Public	<input checked="" type="checkbox"/>	0
5 Years	1906597	Public	<input checked="" type="checkbox"/>	0
None	1906592	Public	<input checked="" type="checkbox"/>	0
Other	1906598	Public	<input checked="" type="checkbox"/>	0

Export options: Excel | PDF | RTF

For the observation template:

Observation Template

Name: Sigmoidoscopy Result
Category: Consult
Description: Sigmoidoscopy Results

Order Type: Response
Type: ▼
Benchmark: ▼
Print Type: Select Print Type... ▼

Edit Privilege: All Haven Staff ▼
Use Privilege: All Haven Staff ▼
Step: ▼
Recipient: ▼

Creator: Updated: 2022-04-01

Observation Name	Default Value	Comment	Sort	Max	Reuse	Code	ID
Sigmoidoscopy Report			0				<input type="checkbox"/>
Surgeon Completed			1				<input type="checkbox"/>
Recommended Follow up			5				<input type="checkbox"/>
Additional Notes			10				<input type="checkbox"/>

Observation Type

Observation Name
Colonoscopy Report

Data Type
Title

Managed List ▼ Order 0 Increment ▼

Instruction/Note 🔗 Question 🔗

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

System ▼ Code ▼

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 ?

Observation Type

Observation Name: **Surgeon Completed**

Data Type: **Provider**

Managed List: [Empty]

Order: 1

Increment: [Empty]

Units/Format: [Empty]

Display Range: [Empty]

Lower Range: [Empty]

Upper Range: [Empty]

Drilldown Template: [Empty]

Default Graph Template: [Empty]

System: [Empty]

Code: [Empty]

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: []

Validation: [Empty]

Hide Observation Label: []

Enable add-on usage: []

Auto Invoke Drilldown: []

Don't Display Value in History: []

Allow Overflow: []

Mapped Display Field: [Empty]

Print Type: [Empty]

Allergy Classification: [Empty]

Parent Flag & ID: [Empty]

Use Privilege: Public

Edit Privilege: Public

Calculation: [Empty]

User Defined Calculation Expression: [Empty]

Apply Save

Observation Type

Observation Name: **Recommended Follow up**

Data Type: **Dropdown**

Managed List: **Sigmoidoscopy Follow Up**

Order: 5

Increment: [Empty]

Units/Format: [Empty]

Display Range: [Empty]

Lower Range: [Empty]

Upper Range: [Empty]

Drilldown Template: [Empty]

Default Graph Template: [Empty]

System: [Empty]

Code: [Empty]

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: []

Validation: [Empty]

Hide Observation Label: []

Enable add-on usage: []

Auto Invoke Drilldown: []

Don't Display Value in History: []

Allow Overflow: []

Mapped Display Field: [Empty]

Print Type: [Empty]

Allergy Classification: [Empty]

Parent Flag & ID: [Empty]

Use Privilege: Public

Edit Privilege: Public

Calculation: [Empty]

User Defined Calculation Expression: [Empty]

Apply Save

Observation Type

Observation Name: **Additional Notes**

Data Type: **Text Box**

Managed List: [Empty]

Order: 10

Increment: [Empty]

Units/Format: [Empty]

Display Range: [Empty]

Lower Range: [Empty]

Upper Range: [Empty]

Drilldown Template: [Empty]

Default Graph Template: [Empty]

System: [Empty]

Code: [Empty]

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: []

Validation: [Empty]

Hide Observation Label: []

Enable add-on usage: []

Auto Invoke Drilldown: []

Don't Display Value in History: []

Allow Overflow: []

Mapped Display Field: [Empty]

Print Type: [Empty]

Allergy Classification: [Empty]

Parent Flag & ID: [Empty]

Use Privilege: Public

Edit Privilege: Public

Calculation: [Empty]

User Defined Calculation Expression: [Empty]

Apply Save

For the task template:

Task Template	Observation Details & Usage
<p>Template Name: Sigmoidoscopy Results</p> <p>Category*: Consult Type: [Empty]</p> <p>Description: Sigmoidoscopy Reason: [Empty]</p> <p>Note / Instructions: [Empty]</p> <p>Progress Indicators: [] []</p> <p>Assignee*: Assign to user Start: when due Due*: Today</p> <p>Last Update: Stephanie Gosche</p> <p><input type="radio"/> Apply as Active <input checked="" type="radio"/> Apply as Completed <input type="radio"/> Apply as Cancelled</p> <p>Urgency: Normal Recurrence: None</p> <p>Save</p>	<p>Ordering Provider: [Empty] Service Provider: [Empty]</p> <p>Billing Template: [Empty]</p> <p>Workflow Step: [Empty]</p> <p>Observation Template: [Empty]</p> <p>Edit Privilege: All Users</p> <p>Use Privilege: All Users</p> <p>Usage: General</p> <p>Graph Template: Current Observation Set</p> <p>Print Type: Default Task</p>

Reports Dashboard

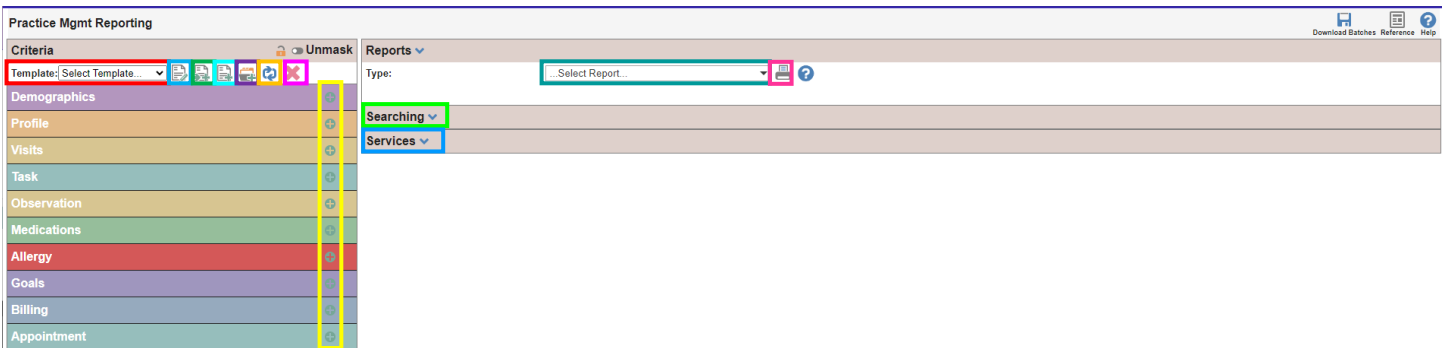
To build queries get into the reports menu.



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.

The screenshot shows the 'Create New Template' form with several fields highlighted in colored boxes:

- Template Name:** A text input field at the top.
- Report:** A dropdown menu showing 'Practice Mgmt' and 'Select Template...'.
- Date criteria type:** A dropdown menu showing 'Relative' and '-- Add --'.
- Other fields:** Copy Template, Type, Secondary Template, Trigger, Service, Task, Profile, Care Plan, Edit Privilege, User Privilege, and Append additional criteria.

Template Name: as per our query naming guidelines.

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

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

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

The screenshot shows the expanded query criteria categories:

- Demographics:** Includes fields for Identifier, Sex, Gender Identity, Preferred Pronouns, Status, Last Name, First Name, Middle Name, Provider In Group, Primary Provider, Sec. Provider, Referring Provider, Family Provider, Provider Group, Care Team, Address Group, Address, City, Postal Code, Phone Number, Rostered, Age Range, DOB, Arrival in Canada, Country of Origin, Ethnic Origin, Has User Account, MedAccess Id, Chart Updated Since, and Validated Since.
- Profile:** Includes fields for Category, Type, Status, Confirmation Status, Persistence, Description, Reported Date, Onset Date, and Count.
- Visits:** Includes fields for Concern, Date, Signed?, Group, Provider, Details, and Count.
- Task:** Includes fields for Category, Type, Description, Reason, Abnormal, Order Type, Observation Value, Observation Template, Urgency, Observation Status, Group, Owner, Owner Role, Ordering Provider, Ordering Provider Role, Ordering Provider Id, Step, Service Provider, Patient Class, Patient Location, Task Date, Not Updated Within, Obs. Date, Status, Cancel Reason, Details, On Waitlist?, and Disposition.

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.

Observation	Medications	Allergy	Goals	Billing	Appointment
<input type="checkbox"/> Category: All <input type="checkbox"/> User: <input type="checkbox"/> Status: <input type="checkbox"/> Observation Group: <input type="checkbox"/> Order Type: All <input type="checkbox"/> Benchmark: Observation <input type="checkbox"/> <input type="checkbox"/> (last) Exact <input type="checkbox"/> <input type="checkbox"/> Date: 24-Oct-2023 to 24-Oct-2023 <input type="checkbox"/> Time: hh:mm aa <input type="checkbox"/> Count: Equals	<input type="checkbox"/> Drug Name: <input type="checkbox"/> ATC Class: <input type="checkbox"/> Average Daily Dose: mg <input type="checkbox"/> Active Status: <input type="checkbox"/> Drug Use: All <input type="checkbox"/> PRN: <input type="checkbox"/> Start Date: 24-Oct-2023 to 24-Oct-2023 <input type="checkbox"/> End Date: dd-MMM-yyyy to dd-MMM-yyyy <input type="checkbox"/> Indication: <input type="checkbox"/> Provider: All <input type="checkbox"/> Signing Status: <input type="checkbox"/> Prescriber Status: <input type="checkbox"/> Count: Equals	<input type="checkbox"/> Allergen: <input type="checkbox"/> Status: <input type="checkbox"/> Reaction: <input type="checkbox"/> Severity: <input type="checkbox"/> Count: Equals	<input type="checkbox"/> Name: <input type="checkbox"/> Goal Met?: <input type="checkbox"/> Due Before: dd-MMM-yyyy <input type="checkbox"/> Out of range?: <input type="checkbox"/> Status: <input type="checkbox"/> Individualized?: <input type="checkbox"/> Reason: <input type="checkbox"/> Cancel Reason: All <input type="checkbox"/> Count: Equals	<input type="checkbox"/> Billing Item: <input type="checkbox"/> Bill Date: <input type="checkbox"/> Status: All <input type="checkbox"/> Insurer: All <input type="checkbox"/> Group: All <input type="checkbox"/> Attending Provider: All <input type="checkbox"/> Location: All <input type="checkbox"/> Third Party: <input type="checkbox"/> Payee Num: <input type="checkbox"/> Seq/Claim #: <input type="checkbox"/> Remittance Date: <input type="checkbox"/> Batch #: <input type="checkbox"/> Claim Type: All <input type="checkbox"/> Facility: <input type="checkbox"/> Has Warnings?: <input type="checkbox"/> Written Off?: <input type="checkbox"/> Explanatory Code: <input type="checkbox"/> Count: Equals	<input type="checkbox"/> Type: All <input type="checkbox"/> Concern: <input type="checkbox"/> Time Type: All <input type="checkbox"/> Minimum Duration: 0 min <input type="checkbox"/> Requested By: <input type="checkbox"/> Status: All <input type="checkbox"/> Group: All <input type="checkbox"/> Provider or Resource: All <input type="checkbox"/> Resource: <input type="checkbox"/> Equipment: <input type="checkbox"/> Room: <input type="checkbox"/> Bill Status: All <input type="checkbox"/> Appt Time: hh:mm aa to hh:mm aa <input type="checkbox"/> Facility: <input type="checkbox"/> Date: <input type="checkbox"/> Count: Equals
<input type="checkbox"/> not	<input type="checkbox"/> not	<input type="checkbox"/> not	<input type="checkbox"/> not	<input type="checkbox"/> not	<input type="checkbox"/> not

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)

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 <input type="text"/> to <input type="text"/> 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
or () last) Conta	BP systolic
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
Date	30-Apr-2003 to 16-Nov-2023
Observation + ✕ ✓ not	
Observation +	
() last) Conta	Weight
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 <input type="text"/>
Profile	
Visits	
Task	
Observation <input type="checkbox"/> not	
Observation	<input type="checkbox"/> (last) Exact <input type="text"/> physical activity <input type="text"/>
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 <input type="text"/>
Profile	
Visits	
Task	
Observation <input type="checkbox"/> not	
Observation	<input type="checkbox"/> (last) Exact <input type="text"/> Smoking Status <input type="text"/>
Date	08-Oct-2023 to 08-Oct-2024
Medications	
Allergy	
Goals	
Billing	
Appointment	

G) ESPCN – Quarterly – Pap Eligible

Demographics	
Sex	Female
Status +	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	25 to 69
Profile	
Category +	Surgical Hx
or	Medical
Description +	TAH
or	Total Hysterectomy
or	Total Vaginal Hysterectomy
or	Total Abdominal Hysterectomy
or	Complete Hysterectomy
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
Appointment	

H) ESPCN – Quarterly – Pap Due

Demographics	
Sex	Female
Status +	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	25 to 69
Profile	
Category +	Surgical Hx
or	Medical
Description +	TAH
or	Total Hysterectomy
or	Total Abdominal Hysterectomy
or	Total Vaginal Hysterectomy
or	Complete Hysterectomy
Visits	
Task	
Category +	Lab
Description +	DKML Cytology Gynec
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
or	Gynecological Cytology
Order Type	Result
Task Date	16-Nov-2020 to 29-Sep-2023
Obs. Date	16-Nov-2020 to 16-Nov-2023
Observation	
Order Type	Result
Observation +	Pap Smear
or	gynecological cytology
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 <input type="text"/> to 74 <input type="text"/>
Profile +	
Visits +	
Task + ✖ <input checked="" type="checkbox"/> not	
Category +	Consult ▼ ✖
	or Investigation ▼ ✖
Description +	Colonoscopy <input type="text"/> Cont: ▼
Order Type	Result ▼
Task Date	06-Jul-2013 <input type="text"/> to 07-Jul-2023 <input type="text"/>
Obs. Date	07-Jul-2013 <input type="text"/> to 07-Jul-2023 <input type="text"/>
Task + ✖ <input checked="" type="checkbox"/> not	
Category +	Investigation ▼
Type +	Colonoscopy ▼
Order Type	Result ▼
Task Date	07-Jul-2013 <input type="text"/> to 07-Jul-2023 <input type="text"/>
Obs. Date	07-Jul-2013 <input type="text"/> to 07-Jul-2023 <input type="text"/>
Task + ✖ <input checked="" type="checkbox"/> not	
Category +	Lab ▼
Description +	Fecal Immunochemical <input type="text"/> Cont: ▼ ✖
	or FIT <input type="text"/> Cont: ▼ ✖
Order Type	Result ▼
Task Date	Back <input type="text"/> 2 years ▼ Ahead None ▼
Obs. Date	07-Jul-2021 <input type="text"/> to 07-Jul-2023 <input type="text"/>
Task + ✖ <input checked="" type="checkbox"/> not	
Category +	Consult ▼ ✖
	or Investigation ▼ ✖
Description +	sigmoidoscopy <input type="text"/> Cont: ▼
Order Type	Result ▼
Task Date	Back <input type="text"/> 5 years ▼ Ahead None ▼
Obs. Date	07-Jul-2018 <input type="text"/> to 07-Jul-2023 <input type="text"/>
Observation + ✖ <input checked="" type="checkbox"/> not	
Order Type	Result ▼
Observation +	<input type="checkbox"/> last Exac ▼ Fecal Immunochemical <input type="text"/> <input type="text"/> ▼ ✖
	or <input type="checkbox"/> last Exac ▼ Fecal Immunochemical <input type="text"/> <input type="text"/> ▼ ✖
Date	07-Jul-2021 <input type="text"/> to 07-Jul-2023 <input type="text"/>
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	
ATC Class +	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	16-Nov-1905 to 16-Nov-2023
Allergy +	
Goals +	
Billing +	
Appointment +	

N) ESPCN – Quarterly – Lipids Due

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

Lipid (contains)
Cardiovascular Disease Risk Assessment (contains)

O) ESPCN – Quarterly – Diabetes Eligible

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

P) ESPCN – Quarterly – Diabetes Due

Demographics		
Status +	Active	
Provider In Group	Physicians	
Primary Provider	All	
Age Range	40 to	
Profile		
Visits		
Task		not
Category +	Lab	
Description +	Glucose, Fasting	Cont: ✖
	or A1c	Cont: ✖
Order Type	Result	
Task Date	Back 5 years	Forward All
Obs. Date	to 16-Nov-2023	
Observation		not
Order Type	Result	
Observation +		
(last) Cont:	Glucose, fasting	✖
or (last) Cont:	Hemoglobin A1C	✖
Date	16-Nov-2018 to 16-Nov-2023	
Medications		
Allergy		
Goals		
Billing		
Appointment		

Q) ESPCN – Quarterly – CV Risk Eligible

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

R) ESPCN – Quarterly – CV Risk Due

Demographics	
Status +	Active
Provider In Group	Physicians
Primary Provider	All
Age Range	40 to 74
Profile +	
Visits +	
Task	
Category +	Attachment
Type +	Framingham
Task Date	5 years
Obs. Date	17-Nov-2018 to 16-Nov-2023
Observation	
Category	All
Observation +	
<input type="checkbox"/> Exact	Framingham CVD 10-ye
or <input type="checkbox"/> Contz	cvr
or <input type="checkbox"/> Contz	cv risk
or <input type="checkbox"/> Contz	framingham
or <input type="checkbox"/> Contz	frs
or <input type="checkbox"/> Contz	cardiovascular risk
or <input type="checkbox"/> Exact	10-Year Cardiovascular 65853-4
Date	16-Nov-2018 to 16-Nov-2023
	>= (1 as Number)
Medications	
ATC Class +	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	04-Dec-1945 to 16-Nov-2023
Allergy +	
Goals +	
Billing +	
Appointment +	

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

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

Demographics		✖	
Status +	Active	▼	
Provider In Group	Physicians	▼	
Primary Provider	All	▼	
Profile		+	
Visits		+	
Task		+	
Observation		+	
Medications		+	
Allergy		+	
Goals		+	
Billing		+	
Appointment		+ ✖ <input type="checkbox"/> not	
Type +	All	▼	
Status +	Exclude Cancellati	▼	
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		+ ✖ <input type="checkbox"/> not	
Type +	All	▼	
Status +	Exclude Cancellatio	▼	
Date	↓ 16-Nov-2020	📅 to	16-Nov-2023 📅

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Demographics ✖	
Status +	Active ▼
Primary Provider	Mah, Stanley ▼
Profile +	
Visits +	
Task +	
Observation +	
Medications +	
Allergy +	
Goals +	
Billing + ✖ <input type="checkbox"/> not	
Diagnosis +	<input type="text" value="250"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="401"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="410"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="411"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="412"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="413"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="414"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="420"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="421"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="422"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="423"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="424"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="425"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="426"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="427"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="428"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="429"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="440"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="441"/> ⚙ Cont: ▼ ✖
	or <input type="text" value="491"/> ⚙ Cont: ▼ ✖
or <input type="text" value="492"/> ⚙ Cont: ▼ ✖	
or <input type="text" value="496"/> ⚙ Cont: ▼ ✖	
or <input type="text" value="585"/> ⚙ Cont: ▼ ✖	
or <input type="text" value="588"/> ⚙ Cont: ▼ ✖	
Bill Date ▼	Back (32) 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 + ✖ <input type="checkbox"/> not	
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 (2) All ▼ Ahead All ▼
Appointment + ✖ <input type="checkbox"/> not	
Status +	Exclude Cancellati ▼
Provider or Resource	Mah, Stanley ▼
Date	Back (2) 1 year ▼ Ahead None ▼

**** 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

Demographics	
Sex	Female
Status +	Active
Primary Provider	Ahmed, Ghalib
Age Range	25 to 69
Profile	
Category +	Surgical Hx
or	Medical
Description +	TAH
or	Total Hysterectomy
or	Total Abdominal Hystere
or	Total Vaginal Hysterecto
or	Complete Hysterectomy
Visits	
Task	
Category +	Lab
Description +	DKML cytology gynecol
or	Gynecological Cytology
or	Gynecological cytology
or	Gynecological Cytolog
or	Gynecological Cytolog
or	Gynecological Cytology
Order Type	Result
Task Date	16-Nov-2020 to 29-Sep-2223
Obs. Date	16-Nov-2020 to 17-Nov-2023
Observation	
Order Type	Result
Observation +	Pap Smear
or	Gynecological Cytology
Date	16-Nov-2020 to 16-Nov-2023
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status +	Exclude Cancellati
Provider or Resource	Ahmed, Ghalib
Date	1 year
Appointment	
Status +	Exclude Cancellati
Date	None

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 ▼
Description +	Mammo Cont: ▼
Order Type	Result ▼
Task Date	16-Nov-2021 to 29-Sep-2223
Obs. Date	16-Nov-2021 to 16-Nov-2023
Task + ✖ ✓ not	
Category +	Investigation ▼
Type +	Mammogram ✖ or MAMMOGRAPHY ✖
Order Type	Result ▼
Task Date	16-Nov-2021 to 29-Sep-2223
Obs. Date	16-Nov-2021 to 16-Nov-2023
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment + ✖ ✓ not	
Status +	Exclude Cancellati: ▼
Provider or Resource	Ahmed, Ghalib ▼
Date	Back 1 year Ahead None
Appointment + ✖ ✓ not	
Status +	Exclude Cancellati: ▼
Date	Back None Ahead 3 months

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

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

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

Demographics	
Status +	Active
Primary Provider	Ahmed, Ghalib
Age Range	50 to 74
Profile	
Visits	
Task	
Category +	Consult
or	Investigation
Description +	Colonoscopy
Order Type	Result
Task Date	16-Nov-2013 to 29-Sep-2223
Obs. Date	16-Nov-2013 to 16-Nov-2023
Task	
Category +	Investigation
Type +	Colonoscopy
Order Type	Result
Task Date	16-Nov-2013 to 29-Sep-2223
Obs. Date	16-Nov-2013 to 16-Nov-2023
Task	
Category +	Consult
or	Investigation
Description +	Sigmoidoscopy
Order Type	Result
Task Date	5 years
Obs. Date	16-Nov-2018 to 16-Nov-2023
Task	
Category +	Lab
Description +	Fecal Immunochemical
or	FIT
Order Type	Result
Task Date	2 years
Obs. Date	16-Nov-2021 to 16-Nov-2023
Observation	
Observation +	() last Exac Fecal Immunochemical
Date	16-Nov-2021 to 16-Nov-2023
Medications	
Allergy	
Goals	
Billing	
Appointment	
Status +	Exclude Cancellati
Provider or Resource	Ahmed, Ghalib
Date	1 year
Appointment	
Status +	Exclude Cancellati
Date	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 ▼
Description +	Glucose, Fasting Cont: ✖ or A1c Cont: ✖
Order Type	Result ▼
Task Date	Back 5 years Ahead All
Obs. Date	to 18-Nov-2023
Observation + ✖ ✓ not	
Order Type	Result ▼
Observation +	() last Cont: Glucose, fasting ✖ or () last Cont: Hemoglobin A1C ✖
Date	15-Nov-2018 to 18-Nov-2023
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment + ✖ ✓ not	
Status +	Exclude Cancellati ▼
Provider or Resource	Ahmed, Ghalib ▼
Date	Back 1 year Ahead None
Appointment + ✖ ✓ not	
Status +	Exclude Cancellati ▼
Date	Back None Ahead 3 months

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

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

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

Demographics	
Status +	Active
Primary Provider	Ahmed, Ghalib
Age Range	40 to 74
Profile	
Visits	
Task	
Category +	Lab
Description +	Lipid or Cardiovascular Disease
Order Type	Result
Task Date	Back 5 years Ahead All
Obs. Date	16-Nov-2018 to 16-Nov-2023
Observation	
Category	Lab
Order Type	Result
Observation +	
() last	Exac LDL Cholesterol
or () last	Exac HDL Cholesterol 14646-4
or () last	Exac Cholesterol, Total 14647-2
Date	16-Nov-2018 to 16-Nov-2023
Medications	
ATC Class +	HMG COA REDUCTAS C10AA
Active Status	Active Only
Start Date	16-Nov-1941 to 16-Nov-2023
Allergy	
Goals	
Billing	
Appointment	
Status +	Exclude Cancellati
Provider or Resource	Ahmed, Ghalib
Date	Back 1 year Ahead None
Appointment	
Status +	Exclude Cancellati
Date	Back None Ahead 3 months

Lipid (contains)
 Cardiovascular Disease Risk Assessment (contains)

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

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

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

Demographics ✖	
Status +	Active
Provider In Group	Physicians
Primary Provider	Libsch, Karen
Age Range	0 to 17
Profile +	
Visits +	
Task +	
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment + ✖ <input checked="" type="checkbox"/> not	
Status +	Exclude Cancellatio
Provider or Resource	Libsch, Karen
Date	Back 2 years Ahead None
Appointment + ✖ <input checked="" type="checkbox"/> not	
Status +	Exclude Cancellatio
Provider or Resource	All
Date	Back None Ahead 3 months

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

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

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

Demographics ✖	
Status +	Active
Provider In Group	Physicians
Primary Provider	Libsch, Karen
Age Range	18 to 74
Profile +	
Visits +	
Task +	
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment + ✖ <input checked="" type="checkbox"/> not	
Status +	Exclude Cancellatio
Provider or Resource	Libsch, Karen
Date	Back 3 years Ahead None
Appointment + ✖ <input checked="" type="checkbox"/> not	
Status +	Exclude Cancellatio
Provider or Resource	All
Date	Back None Ahead 3 months

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

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

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

Demographics ✖	
Status +	Active ▼
Provider In Group	Physicians ▼
Primary Provider	Ahmed, Ghalib ▼
Age Range	75 to <input type="text"/>
Profile +	
Visits +	
Task +	
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment + ✖ ☑ not	
Status +	Exclude Cancellati ▼
Provider or Resource	Ahmed, Ghalib ▼
Date	<small>back</small> <input type="text"/> 1 year <small>ahead</small> <input type="text"/> None ▼
Appointment + ✖ ☑ not	
Status +	Exclude Cancellati ▼
Provider or Resource	All ▼
Date	<small>back</small> <input type="text"/> None <small>ahead</small> <input type="text"/> 3 months ▼

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

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

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

Demographics	
Status +	Active
Provider In Group	Physicians
Primary Provider	Ahmed, Ghalib
Age Range	0 to 74
Profile	
Visits	
Task	
Observation	
Medications	
Allergy	
Goals	
Billing	
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	493 Cont: ✖
or	496 Cont: ✖
or	585 Cont: ✖
or	586 Cont: ✖
Bill Date	All Ahead None
Appointment	
Type +	All
Status +	Exclude Cancellati
Provider or Resource	Ahmed, Ghalib
Date	1 year Ahead None
Appointment	
Status +	Exclude Cancellati
Provider or Resource	All
Date	None Ahead 3 months

**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

Demographics ✖	
Provider In Group	Physicians ▼
Primary Provider	All ▼
Profile +	
Visits +	
Task + ✖ not	
Category +	Patient followup ▼
Description +	Screening Reviewed by Cont: ▼
Task Date	<small>Back</small> 6 days ▼ <small>Ahead</small> None ▼
Status +	Active ▼ ✖ or Complete ▼ ✖
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment +	

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

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

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

Demographics ✖	
Provider In Group	Physicians ▼
Primary Provider	All ▼
Profile +	
Visits +	
Task + ✖ not	
Category +	Patient followup ▼
Type +	No Visit in 3 yrs ▼
Task Date	<small>Back</small> 6 days ▼ <small>Ahead</small> None ▼
Status +	Active ▼ ✖ or Complete ▼ ✖
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment +	

M) ESPCN – Tracking – Chronic Disease Outreach

Demographics ✖	
Provider In Group	Physicians <input type="button" value="v"/>
Primary Provider	All <input type="button" value="v"/>
Profile +	
Visits +	
Task + ✖ not	
Category +	Patient followup <input type="button" value="v"/>
Type +	Chronic Disease <input type="button" value="v"/>
Task Date	<small>back</small> 6 days <input type="button" value="v"/> <small>ahead</small> None <input type="button" value="v"/>
Status +	Active <input type="button" value="v"/> ✖
	or Complete <input type="button" value="v"/> ✖
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment +	

N) ESPCN – Tracking – 75+ Outreach

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

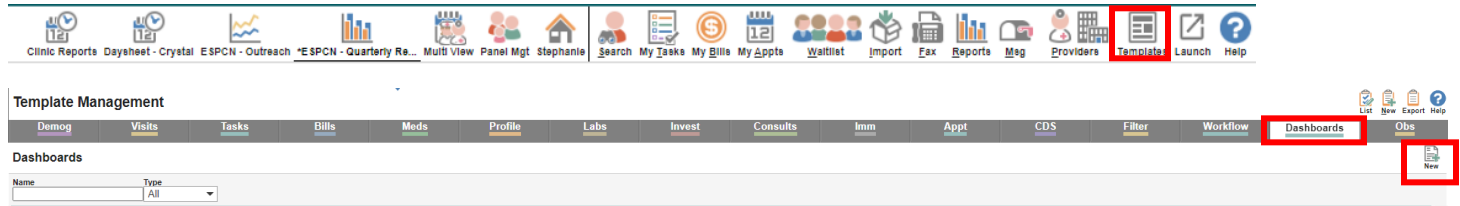
O) ESPCN – Tracking – Screening Outreach

Demographics ✖	
Provider In Group	Physicians <input type="button" value="v"/>
Primary Provider	All <input type="button" value="v"/>
Profile +	
Visits +	
Task + ✖ not	
Category +	Patient followup <input type="button" value="v"/>
Type +	Screening Outrac <input type="button" value="v"/>
Task Date	<small>back</small> 6 days <input type="button" value="v"/> <small>ahead</small> None <input type="button" value="v"/>
Observation +	
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment +	

Building Dashboards

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

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



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

Name	Description	Dashboard Type Main	Display Icon Control Panel	Edit Privilege Private	Use Privilege Private	Dashboard Criteria none	Save
------	-------------	------------------------	-------------------------------	---------------------------	--------------------------	----------------------------	------

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

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

PURPLE: The dashboard type should be Main.

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

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

Save once complete.

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

New Dashboard Item ✖

Context

Display Name

Color

Height

Width

Auto-Refresh?

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

New Dashboard Item ✖

Context

Type

Display Name

Help Key

Color

Height

Width

Auto-Refresh?

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

<p>Q1 - Lifestyle Reporting</p> <p>ESPCN - Quarterly - Exercise Assessment Due ESPCN - Quarterly - Tobacco Assessment Due ESPCN - Quarterly - Eligible 18+</p> <table style="width: 100%; border-collapse: collapse;"> <tr><td></td><td style="text-align: right;">Count</td></tr> <tr><td>Hatem Naal</td><td style="text-align: right;">1213</td></tr> <tr><td>Ibrahim Shebani</td><td style="text-align: right;">1175</td></tr> <tr><td>Marwan Al-doori</td><td style="text-align: right;">1318</td></tr> <tr><td>Total</td><td style="text-align: right;">3706</td></tr> </table>		Count	Hatem Naal	1213	Ibrahim Shebani	1175	Marwan Al-doori	1318	Total	3706	<p>Q1/Q3 - Pap Screening</p> <p>ESPCN - Quarterly - Pap Due ESPCN - Quarterly - Pap Eligible</p> <table style="width: 100%; border-collapse: collapse;"> <tr><td></td><td style="text-align: right;">Count</td></tr> <tr><td>Hatem Naal</td><td style="text-align: right;">496</td></tr> <tr><td>Ibrahim Shebani</td><td style="text-align: right;">311</td></tr> <tr><td>Marwan Al-doori</td><td style="text-align: right;">362</td></tr> <tr><td>Total</td><td style="text-align: right;">1169</td></tr> </table> <p>Q1/Q3 - Mammo Screening</p> <p>ESPCN - Quarterly - Mammo Due ESPCN - Quarterly - Mammo Eligible</p> <table style="width: 100%; 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Below is how to set up the widgets.

Quarterly Reporting – Q1 - Lifestyle Widget

Q1 - Lifestyle Reporting ✕

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

✕ ESPCN - Quarterly - Eligible 18+ (Vitals & Lifestyle)
✕ ESPCN - Quarterly - Tobacco Due Assessment
✕ ESPCN - Due for Exercise

Display Name: Q1 - Lifestyle Reporting
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 Violet
Height: Fit all content
Width: Small (33%)

Save Item Cancel

Quarterly Reporting – Q1 – Vitals Widget

Q1 - Vitals Reporting ✕

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

✕ ESPCN - Quarterly - Height & Weight Screened
✕ ESPCN - Quarterly - Eligible 18+ (Vitals & Lifestyle)
✕ ESPCN - Quarterly - BP Screened

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

Save Item Cancel

Quarterly Reporting – Q1 – CV Risk Screening Widget

Q1 - CV Risk Screening ✕

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

✕ ESPCN - Quarterly - CVR Due
✕ ESPCN - Quarterly - CVR Eligible

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

Save Item Cancel

Quarterly Reporting – Q1/Q3 - Pap Widget

Q1/Q3 - Pap Screening ✕

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

✕ ESPCN - Due for Pap
✕ ESPCN - Eligible for Pap

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

Save Item Cancel

Quarterly Reporting – Q2/Q4 - Panel by Age Widget

Q2/Q4 - Panel By Age ✖

Context: Reporting

Type: Statistics

Filters: -- Add --

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

Display Name: Q2/Q4 - Panel By Age

Statistic: Count

Group By: Age Group - 10 Year

Then Group By:

Output Type: Table Default trend?

Truncate table text?

Limit: All

Order: Aggregate

Help Key: Reporting

Color: Bill Blue

Height: Fit all content

Width: Small (33%)

Save Item Cancel

Quarterly Reporting – Q2/Q4 - Panel by Gender Widget

Q2/Q4 - Panel By Gender ✖

Context: Reporting

Type: Statistics

Filters: -- Add --

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

Display Name: Q2/Q4 - Panel By Gender

Statistic: Count

Group By: Primary Provider

Then Group By: Gender

Output Type: Table Default trend?

Truncate table text?

Limit: All

Order: Aggregate

Help Key: Reporting

Color: Bill Blue

Height: Fit all content

Width: Small (33%)

Save Item Cancel

Quarterly Reporting – Q2/Q4 - Verification Rate Widget

Q2/Q4 - Verification Rate ✖

Context: Reporting

Type: Statistics

Filters: -- Add --

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

Display Name: Q2/Q4 - Verification Rate

Statistic: Count

Group By: Primary Provider

Then Group By:

Output Type: Table Default trend?

Truncate table text?

Limit: All

Order: Aggregate

Help Key: Reporting

Color: Bill Blue

Height: Fit all content

Width: Small (33%)

Save Item Cancel

Outreach Dashboard

PCCA Weekly Tracking: Record These Weekly

[ESPCN - Tracking - No Appt in 2 Years \(0-17\) Outreach](#)
[ESPCN - Tracking - No Appt in 3 Years \(18+\) Outreach](#)
[ESPCN - Tracking - 75+ Outreach](#)

[ESPCN - Tracking - Chronic Disease Outreach](#)
[ESPCN - Tracking - Screening Outreach](#)
[ESPCN - Tracking - Screening Reviewed by PCCA](#)

	Count
Adedapo Aderibigbe	3
Janine Karpakis	1
Total	4

Third Next Available (TNA)

Ordered by: Attending Provider | Search: 3rd Next Available (Days) | Limit: All

3rd Next Available (Days)

Dr. Adedapo Aderibigbe
 Dr. Janine Karpakis
 Cindy Groenen RN
 Dr. Omowumi "Wumi" Iyaoromi

ESPCN - Population Outreach - Dr. Aderibigbe

[ESPCN - Outreach - No Appt in 2 Years \(0-17\) - Ade](#)
[ESPCN - Outreach - No Appt in 3 Years \(18-74\) - Aderibigbe](#)

[ESPCN - Outreach - 75+, No Appt in 1 Year - Aderibigbe](#)
[ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Aderibigbe](#)

	Count
Adedapo Aderibigbe	
Total	

ESPCN - Population Outreach - Dr. Karpakis

[ESPCN - Outreach - No Appt in 2 Years \(0-17\) - Karpakis](#)
[ESPCN - Outreach - No Appt in 3 Years \(18-74\) - Karpakis](#)

[ESPCN - Outreach - 75+, No Appt in 1 Year - Karpakis](#)
[ESPCN - Outreach - Chronic Disease, No Appt in 1 Year - Karpakis](#)

	Count
Janine Karpakis	
Total	

ESPCN - Population Outreach - Dr. Wumi

[ESPCN - Outreach - No Appt in 2 Years \(0-17\) Wumi](#)
[ESPCN - Outreach - No Appt in 3 Years \(18-74\) Wumi](#)

[ESPCN - Outreach - 75+, No Appt in 1 Year \(Wumi\)](#)
[ESPCN - Outreach - Chronic Disease, No Appt in 1 Year \(Wumi\)](#)

No data found matching filter.

Screening Outreach - No Appt in 1 Year - Dr. Ade

[ESPCN - Outreach - Pap Due, No Appt in 1 Year - Ade](#)
[ESPCN - Outreach - Mammogram Due, No Appt in 1 Year - Ade](#)

[ESPCN - Outreach - CRC Due, No Appt in 1 Year - Ade](#)
[ESPCN - Outreach - Diabetes Due, No Appt in 1 Year - Ade](#)

[ESPCN - Outreach - Lipids Due, No Appt in 1 Year - Ade](#)

	Count
Adedapo Aderibigbe	
Total	

Screening Outreach - No Appt in 1 Year - Dr. Karpakis

[ESPCN - Outreach - Pap Due, No Appt in 1 Year - Karpakis](#)
[ESPCN - Outreach - Mammogram Due, No Appt in 1 Year - Karpakis](#)

[ESPCN - Outreach - CRC Due, No Appt in 1 Year - Karpakis](#)
[ESPCN - Outreach - Diabetes Due, No Appt in 1 Year - Karpakis](#)

[ESPCN - Outreach - Lipids Due, No Appt in 1 Year - Karpakis](#)

	Count
Janine Karpakis	
Total	

Screening Outreach - No Appt in 1 Year - Dr. Wumi

[ESPCN - Outreach - Pap Due, No Appt in 1 Year \(Wumi\)](#)
[ESPCN - Outreach - Mammogram Due, No Appt in 1 Year \(Wumi\)](#)

[ESPCN - Outreach - CRC Due, No Appt in 1 Year \(Wumi\)](#)
[ESPCN - Outreach - Diabetes Due, No Appt in 1 Year \(Wumi\)](#)

[ESPCN - Outreach - Lipids Due, No Appt in 1 Year \(Wumi\)](#)

	Count
Omowumi "Wumi" Iyaoromi	
Total	

Weekly Tracking – For Tracking Sheet Widget

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

Weekly Tracking - For Tracking Sheet

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

- ✖ ESPCN - Tracking - Screening Reviewed by PCCA
- ✖ ESPCN - Tracking - 75+ Outreach
- ✖ ESPCN - Tracking - Chronic Disease Outreach
- ✖ ESPCN - Tracking - Screening Outreach
- ✖ ESPCN - Tracking - No Appt in 3 Years Outreach
- ✖ ESPCN - Tracking - No Appt in 2 Years Outreach

Display Name: Weekly Tracking - For Tr
 Statistic: Count
 Group By: Primary Provider
 Then Group By:
 Output Type: Table Default trend?
 Truncate table text?
 Limit: All
 Order: Count (Ascending)
 Help Key: Reporting
 Color: Light Blue
 Height: Fit all content
 Width: Medium (50%)

TNA

Context: Find Availability
 Type: Statistics
 Filters: -- Select --

Display Name: TNA
 Statistic: 3rd Next Available (C
 Output Type: Table Default trend?
 Truncate table text?
 Limit: All
 Order: Count (Ascending)
 Help Key: Schedule
 Color: Light Blue
 Height: Medium (50%)
 Width: Medium (50%)

Adults, No Appt 3 Years Outreach Widget

Population Outreach - No Appt in 3 Years

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

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

Display Name: Population Outreach - No Appt in 3 Years
 Statistic: Count
 Group By: Primary Provider
 Then Group By: [Empty]
 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 Year

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

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

Display Name: Population Outreach - 75+, No Appt in 1 Year
 Statistic: Count
 Group By: Primary Provider
 Then Group By: [Empty]
 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 - Chronic Disease
 Statistic: Count
 Group By: Primary Provider
 Then Group By: [Empty]
 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. Ahmed
 Statistic: Count
 Group By: Primary Provider
 Then Group By: [Empty]
 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

ESPCN - Q2/Q4 Marcet Numerators		ESPCN - Q2/Q4 Tindall Numerators		ESPCN - Q2/Q4 Blais Numerators	
ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator) Marcet		ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator) Tindall		ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator) Blais	
ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator) Marcet		ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator) Tindall		ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator) Blais	
ESPCN - Quarterly QI - Chronic Disease Patients Seen in the Last Year (Numerator) Marcet		ESPCN - Quarterly QI - Chronic Disease Patients Seen in the Last Year (Numerator) Tindall		ESPCN - Quarterly QI - Chronic Disease Patients Seen in the Last Year (Numerator) Blais	
Candy Marcet	Count	Debbie Tindall	Count	Guy Robert Blais	Count
Total		Total		Total	
ESPCN - Q2/Q4 Marcet Denominators		ESPCN - Q2/Q4 Tindall Denominators		ESPCN - Q2/Q4 Blais Denominators	
ESPCN - Quarterly QI - Active Patients (Denominator) Marcet		ESPCN - Quarterly QI - Active Patients (Denominator) Tindall		ESPCN - Quarterly QI - Active Patients (Denominator) Blais	
ESPCN - Quarterly QI - Patients 75+ (Denominator) Marcet		ESPCN - Quarterly QI - Patients 75+ (Denominator) Tindall		ESPCN - Quarterly QI - Patients 75+ (Denominator) Blais	
ESPCN - Quarterly QI - Chronic Disease Patients (Denominator) Marcet		ESPCN - Quarterly QI - Chronic Disease Patients (Denominator) Tindall		ESPCN - Quarterly QI - Chronic Disease Patients (Denominator) Blais	
Candy Marcet	Count	Debbie Tindall	Count	Guy Robert Blais	Count
Total		Total		Total	
ESPCN - Q2/Q4 Safranovich Numerators		ESPCN - Q2/Q4 Ahmed Numerators		ESPCN - Q2/Q4 Corrigan Numerators	
ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator) Safranovich		ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator) Ahmed		ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator) Corrigan	
ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator) Safranovich		ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator) Ahmed		ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator) Corrigan	
ESPCN - Quarterly QI - Chronic Disease Patients Seen in the Last Year (Numerator) Safranovich		ESPCN - Quarterly QI - Chronic Disease Patients Seen in the Last Year (Numerator) Ahmed		ESPCN - Quarterly QI - Chronic Disease Patients Seen in the Last Year (Numerator) Corrigan	
Colin Ed Safranovich	Count	Ghalib Ahmed	Count	Jason Corrigan	Count
Total		Total		Total	
ESPCN - Q2/Q4 Safranovich Denominators		ESPCN - Q2/Q4 Ahmed Denominators		ESPCN - Q2/Q4 Corrigan Denominators	
ESPCN - Quarterly QI - Active Patients (Denominator) Safranovich		ESPCN - Quarterly QI - Active Patients (Denominator) Ahmed		ESPCN - Quarterly QI - Active Patients (Denominator) Corrigan	
ESPCN - Quarterly QI - Patients 75+ (Denominator) Safranovich		ESPCN - Quarterly QI - Patients 75+ (Denominator) Ahmed		ESPCN - Quarterly QI - Patients 75+ (Denominator) Corrigan	
ESPCN - Quarterly QI - Chronic Disease Patients (Denominator) Safranovich		ESPCN - Quarterly QI - Chronic Disease Patients (Denominator) Ahmed		ESPCN - Quarterly QI - Chronic Disease Patients (Denominator) Corrigan	
Colin Ed Safranovich	Count	Ghalib Ahmed	Count	Jason Corrigan	Count
Total		Total		Total	

Each physician will require a numerator and denominator widget.

ESPCN - Q2/Q4 Ahmed Numerators ✖

Context: Reporting

Type: Statistics

Filters: -- Add --

- ✖ ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator) Ahmed
- ✖ ESPCN - Quarterly QI - Patients 75+, Seen in the Last Year (Numerator) Ahmed
- ✖ ESPCN - Quarterly QI - Chronic Disease Patients Seen in the Last Year (Numerator) Ahmed

Display Name: ESPCN - Q2/Q4 Ahmed

Statistic: Count

Group By: Primary Provider

Then Group By: [Empty]

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

ESPCN - Q2/Q4 Ahmed Denominators ✖

Context: Reporting

Type: Statistics

Filters: -- Add --

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

Display Name: ESPCN - Q2/Q4 Ahmed

Statistic: Count

Group By: Primary Provider

Then Group By: [Empty]

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

Creating a QI Physicians Group


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

General Settings

Name:

Sequence Number:

Appointment Interval:

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

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

Creating a Third Next Available Filter

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

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

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

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

Default Criteria					
Date of:	Appointment	Start:	All	End:	All
Provider or Resource:	All	Limit:	1		
Save					

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

Default Criteria							
Date of:	Appointment	Start:	Today	End:	All	Group:	Physicians
Status:	Exclude C...	Start Time:		Type:	All	Provider or Resource:	All
Time Type:	All	Limit:	100				
Save							

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

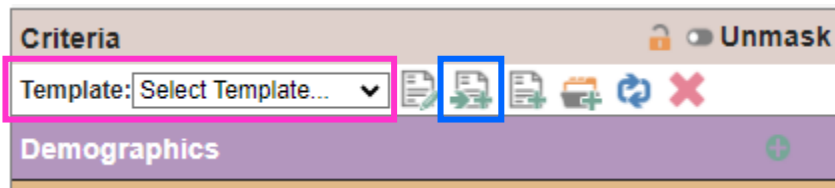
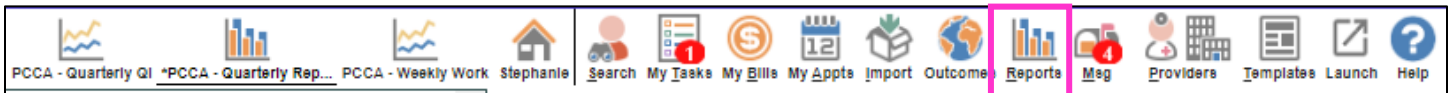
Creating CDS Notifications

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

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

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

Or



Once you have your report open, click on the [Create New Template from Existing](#) button.

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

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

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

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

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

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

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

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

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

Clinic Setup Checklist

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

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