



CCO Primary Care Lead (HNHB LHIN)

Accuro Guide for Cancer Screening

| Document Import | |
|------------------------------------|---------------|
| Document Management | <u>Pg. 04</u> |
| Cumulative Preventive Care Reports | <u>Pg. 06</u> |
| Downloading Queries | <u>Pg. 09</u> |
| Creating Custom Queries | <u>Pg. 13</u> |
| Creating & Assigning to Cohorts | <u>Pg. 20</u> |
| Managing Cohorts | <u>Pg. 21</u> |
| Tracking | <u>Pg. 22</u> |
| EMR Medical History Bands | <u>Pg. 24</u> |

Please Note: All patient information contained herein is clinically fictitious data, any similarity to actual persons, living or dead, is purely coincidental.

Some patient names are those of celebrities and known characters, and again, does not reflect actual clinical data.





Getting Started

Considerations

This process becomes necessary when importing documents from hospitals who are not live on Health Report Manager (HRM). When managing or creating categories with the Documents section it is recommended the naming conventions chosen are the same (or similar) to those coming from other HRM enabled sending facilities.

Document Import

E

To import a document, select the **Documents** folder from the navigation bar in Accuro. From within this module you will have the ability to categorize imported documents (scanned or faxed) to be inserted directly into a patient's chart.

| Home | 🔣 🔕 🖉 🔛 🖶 🖬 🖸 🚺 1/1 Pages 🚺 🔯 100% 🗸 0" 🗸 | Patient |
|----------------|---|---|
| 7 Scheduler | | Heath # 1234 567 887 Birtholde 1911-May-01 |
| Traffic | | Created 01/31/2018 Received MMDD//YYY Reviewed 01/31/2018 |
| L Patients | | Priority Normal V From Description Include filename |
| Documents | E | Tie Document |
| \$ Claims | | Batch Mode |
| EMR | | Clear Clear C Open C Open C Annotate Document |
| 讲 Wait List | C 2 v /2 C FilesLeft 2 4 | Next Appointment: None |
| | Look in: Documents V E EV Custom Office Templates Custom Office Templates Custom - Demo Forms - Demo Scenning - Demo Default.rdp File name: Scanning - Demo Piles of type: All Files V Cancel | |

Select the **Folder** icon as indicated above and navigate to the directory where your documents are stored. For the purpose of this exercise, the report we are importing is stored in the Documents folder.



From within the **Categorization** area marked green (below) click on the drop-down arrow and select the **Category** which applies to your document. For this example, we have chosen **Diagnostic Imaging**.

To add further information to the report, a **Sub-Category** can also be applied in the drop-down list immediately below the Category option. For this example, we have selected **Mammogram**.



Note: Categories and Sub-Categories are not (typically) setup for the clinic by default and must be created manually. The process of creating your own categories will be reviewed at the end of this workflow.

The categorization mentioned above is designed to be applied to all Diagnostic Imaging and Mammogram reports. If, however, a more detailed description of this *specific* report is required, it can be entered into the **Notes** field (above – purple).

Examples may include "dense breast tissue", "normal", or even the sending facility of this report.

Within the filing section (marked orange) select the appropriate clinician for which this document should be attached, and select either the **File Document** option which delivers the report directly to the Virtual Chart, or **Send to Provider** which sends the report to both the Virtual Chart and the clinicians Inbox for review.

| Day Sheet Encounter Notes | Chronic Conditions Virtual Chart Medications | Patient Information | | | | | |
|---------------------------|--|----------------------|--|---|---|----------------------------------|----------------|
| Patient PTLastOne, PTOne | | 106 years old female | Letters Patient Generation | s/Forms I Tasks S Notes I Labs ated Letters Documents Date | earch Patient Chart e Filter:All Items | Q ←✓ | |
| All 🗸 | Date | Created | 1 | Туре | SubType | Note | Provider |
| E-Cipical Notes | 2020-Aug-01 2 | 2020-Aug-01 | @ S (| Diagnostic Imaging Report | Microalbumin Ur DL<=3.0 | . Microalbumin Ur DL<=3.0 | Unassigned |
| Forms | 2018-Jan-31 2 | 2018-Jan-31 | [| Diagnostic Imaging | Mammogram | dense breast tissue normal | Tester, Tommy |
| Documents | 2018-Jan-30 2 | 2018-Jan-30 | e (| Generated Letters | | Printed 2018-Jan-30 Con | Larsen, Darren |
| Tasks | 2018-Jan-30 2 | 2018-Jan-30 | S I | Medical Records Report | Consult Note-Psychiatrist | Principal Author: Pedlow, | Unassigned |
| Notes | 2018-Jan-30 2 | 2018-Jan-30 | e (| Clinical Note | | Consult - Final | Larsen, Darren |
| Uiagnosis | 2018-Jan-25 2 | 2018-Jan-25 | S I | Medical Records Report | Admission Note | Principal Author: Pedlow, | Unassigned |
| | 2018-Jan-24 2 | 2018-Jan-24 | (S) [| Diagnostic Imaging Report | RAD | Phys find Abd - 2018-Jan. | .Unassigned |

Hamilton Family Health Team

**Post import result. From Virtual Chart.



Document Management

Document categorization is an important documentation step which aids in the filing and recall of received reports. To create your own categories, navigate to the **Documents** section of the EMR and select the **Sub-Category** drop down and select **-- Manage --**.

| | Patient | |
|--------------|-----------------------|---|
| | PTLastOne, PTOne | |
| | Health # 1234 567 897 | |
| | Birthdate 1911-May-01 | |
| Category 🗕 | Manage | ¥ |
| Sub-Category | Manage | ~ |

Select the Add button and enter the Sub-Type name as indicated below. Click 'OK' to save the setting.

| | Sub-Type Mammogram |
|---|---|
| Abcomen | Parent folders |
| Appointment Notification Dermatology eConsult | Folder |
| Head Heamatology Nephrology Renewal | Documents Consult |
| | Labs |
| Close | Pharmacy Request Referral Letter Ultrasound |
| | OK Cancel |

With the Sub-Category created we can now create and link the primary category to it. Select the Category drop-down and select -- Manage --. Enter the name for the Category (known as a Folder in this screen only), then click <u>all</u> sub-category types that you would like to link to it.

For example. If the category were to be called Diagnostic Imaging, you may also want to select *Abdomen*, *Head*, and *Mammogram*. Click 'OK' to save the settings.

| | | Fo | older [| Diagnostic Imaging |
|------------------|----------------|----------------|---|--------------------------------------|
| СТ | | Su | ub-Typ | Des |
| Documents | | | | |
| eConsult | | | | Folder |
| Images | | | Image: A set of the set of the | Abcomen |
| Labs | | | \Box | Appointment Notification |
| MRI | | | $\overline{\neg}$ | Dermetology |
| Pharmacy Request | | | | oConout |
| Referral Letter | | | | |
| V Reve | | | <u> </u> | Head |
| A-nays | | | | Heamatology |
| | | | ~ | Mammogram |
| | | | | Nephrology |
| | | | | Renewal |
| | | | | OK Cancel |
| OntarioMD | - | | | CCO Primary Care Lead (HNHB LHIN) |
| | lamilton Famil | ly Health Tear | n | , , , |

Adding multiple sub-categories to a primary category will display only those select report types settings.

| ie, PTOne | |
|--------------------------|---|
| 1234 567 897 | |
| 1911-May-01 | |
| c Imaging | ~ |
| | ~ |
| | |
| | |
| | |
| | |
| am | |
| Normal | ¥ |
| | |
| n 🗌 Include filename | |
| | |
| 🗈 File Document | |
| ommy | ~ |
| 🗌 Batch Mode 🛛 💣 Options | |
| 1 Send to Provider(s) | |
| <u>C</u> lear | |
| 🛃 Open | |
| | |
| | te, PTOne 1234 567 897 1911-May-01 c Imaging am Normal Include filename File Document ommy Batch Mode Clear Clear Clear Clear Clear Clear Clean |



-



CCO Primary Care Lead

Cumulative Preventive Care Reports

Accuro has a built-in report to calculate the preventive care bonuses that can be used to determine bonus achievements.

To generate the Cumulative Preventive Care Bonus report, click the Bullseye > Billing > Cumulative Preventive Care Bonus.

| | File | | + | Defau | Default Billing Percent | | | | | | | | |
|-----|-------|------------|---|-------------------|-------------------------|-----------------------|-------------|-----------|----|----------|-------|-------|--|
| | Sch | eduler | , | Billing Maxim | Rules ize Bill | s | | | | | | | |
| | Too | ls | | New B | ill | | | | | | | | |
| | Rep | oorts | | New P | roced | ure | | | | | Ctd+A | rl+P | |
| | Billi | ng | | Find Ir | woice | | | | | | Cana | tri+i | |
| | Use | rs | | Find C | laim N | lumber | | | | | | | |
| | Help | þ | + | Find C Billing | laim II Option | D | | | | | Ct | rl+K | |
| | Bac | kup | | Proce | dure C | ode Loo | kup | | | | | | |
| | CDS | 3 | | Manag | je Insu | urers | | | | | | | |
| | Con | figuration | | Cumul | care i ative i | Card Val Preventiv | e Care Boni | IS | | | | | |
| E A | | | | | 48 | | | | | | | | |
| | A | CCURO® | 4 | | 1 | Ē | e | \bowtie | | G | - | , | |
| - | | EMR | ~ | | _ | | | | U. | <u> </u> | | | |

In the dialog box that opens, select the physician and fiscal year end for which you want the report and click 'Run'.

| \$ | | Cumulative Preventive Care Bonus | × |
|----------------------------------|--------------------------------------|----------------------------------|------------|
| Options Mappings | | | |
| Provider: Fiscal Year Ending: | Abraham, Adriane March 31, 2018 📩 | | |
| | | | Run Cancel |

By default, the EMR tracks the QCodes/codes billed for enrolled patients to calculate the preventive bonuses as illustrated in the summary below. The codes being tracked and calculated for each of the prevention screenings can be viewed under the mapping tab. **Note**: While users can map other fields, doing so may become less manageable. Best practice is to bill appropriate QCodes/billing codes and leave mapping per EMR defaults.

Under the compliance rate,

- the patient population that falls into each screening category is listed as the denominator,
- the patients for whom the prevention is complete (identified by QCode/billing code) appears as the numerator,
- patients excluded (identified by QCode/billing code) from the prevention is subtracted from the patient population (denominator) and appears to the right of the denominator





The number of patients completed is calculated against the patient population (less exclusions) to determine the bonus percentage achieved. If the achieved percentage falls within a bonus range, the applicable 'Service Code' and 'Required Rate' will highlight.

Note: While users can adjust the numbers for completed/excluded and/or patient populations in this view, the next time the report is run, the adjusted quantities will not be remembered and be reset. Best practice to adjust for any discrepancies is to bill applicable QCodes dated within the fiscal period for which it applies.

| Provider: Arispe, Esteban | | | | 🖶 Prin |
|-----------------------------|-----------------|--------------|---------------|----------------|
| Category | Compliance Rate | Service Code | Required Rate | |
| | | Q100A | 60% | |
| | 10 | Q101A | 65% | View Patients |
| Influenza Vaccine | = 11 | 1% Q102A | 70% | |
| | 95 | Q103A | 75% | Create Claim |
| | | Q104A | 80% | |
| | | Q105A | 60% | |
| | 10 | Q106A | 65% | Man Deliverte |
| Pap Smear | 49 - = 67 | 7% Q107A | 70% | View Patients |
| | 73 - 0 - | Q108A | 75% | Create Claim |
| | | Q109A | 80% | |
| | | Q110A | 55% | |
| | b. A | Q111A | 60% | Man Dekente |
| Mammooraphy | = 4 | 5% Q112A | 65% | View Patients |
| | 48 - 1 - | Q113A | 70% | Create Claim |
| | | Q114A | 75% | |
| | 0.0 | Q115A | 85% | Maw Deligate |
| Childhood Immunizations | = 67 | 7% Q116A | 90% | view Patients |
| | 3 🗘 | Q117A | 95% | Create Claim |
| | | Q118A | 15% | |
| | | Q119A | 20% | |
| | 30 🗘 | Q120A | 40% | View Patients |
| Colorectal Cancer Screening | 72 = 4 | % Q121A | 50% | Create Claim |
| | 10,0 | Q122A | 60% | oreate orallin |
| | | Q123A | 70% | |

To the right of the calculations, users can generate a report to view the patients within the selected screening category. In the report, users can sort the information by clicking on the headings (Last Name; First Name; Health #; Status).

| Pap Smear | <u>49÷</u> 73÷ - 0÷ = 67% | Q107A Q108A | 70% 75% | Create Claim | 💠 Cumulat | ive Preventive | Care Patients | - Pap Smear |
|-----------|------------------------------|----------------|------------|--------------|--|----------------|---------------|-------------|
| | Land Land | Q109A | 80% | | Last Name | First Name | Health # | Status |
| | | | | | | | | Uncovered |
| | | | | | and the second sec | | | Covered |
| | | | | | A CONTRACTOR OF | | | Covered |
| | | | | | A CONTRACTOR OF A CONTRACTOR OFTA CONTRACTOR O | | | Covered |
| | | | | | a second | | | Covered |
| | | | | | Concession 1 | | | Covered |
| | | | | | a second second | | | Uncovered |
| | | | | | | | | Uncovered |
| | | | | | | | | Uncovered |
| | | | | | | | | Uncovered |
| | | | | | a second second | | | Uncovered |
| | | | | | | | | Covered |
| | | | | | | | | Covered |
| | | | | | | | | Covered |
| | | | | | | | | Covered |
| | | | | | and the second s | | | Uncovered |
| | | | | | | | | Uncovered |
| | | | | | | | | Uncovered |
| | | | | | | | | Uncovered |
| | | | | | Constant of the local division of the local | | | Uncovered |
| | | | | | | | | Close |

Users can also create a claim to bill the service code of the achieved bonus rate.

| | | Q105A | 60% | | 73 | a 67% Message | Q107A | 70% 75% 80% | |
|-----------|---|----------------------------------|--------------------------|---------------|----|----------------------------------|-------------|--------------------------|-----|
| Pap Smear | 49 [°] / _{\$\phi\$} 73 [°] / _{\$\phi\$} - 0 [°] / _{\$\phi\$} = 67% | Q106A Q107A Q108A Q109A | 65% 70% 75% 80% | View Patients | 31 | Claim created for OK | tode: Q106A | 55% 60% 65% 70% | - [|
| | | | | | | | Q114A | 75% | |
| | Ontai | rioMD | | - | | O Primary Care Lead NHB LHIN) | | | |

Hamilton Family Health Team

Located at the top right-hand side, a print option allows users to print a detailed or non-detailed format narrative report of the bonus summary.



Example of non-detailed report by selecting 'No' to include the details on selected patients.

| Arispe, Esteban for Fiscal Year En | ding March 31.2 | 2018 | | | | |
|------------------------------------|-----------------|------------|-------------|-------|--------------|------------|
| Influenza Vaccine | Covered # | Excluded # | Target Pop. | Ratio | Service Code | Req. Ratio |
| Reported Patients: | 10 | | 95 | 11% | | |
| Detected Patients: | 0 | | 95 | 0% | | |
| Pap Smear | Covered # | Excluded # | Target Pop. | Ratio | Service Code | Req. Ratio |
| Reported Patients: | 49 | 0 | 73 | 67% | Q106A | 65% |
| Detected Patients: | 49 | 0 | 73 | 67% | Q106A | 65% |
| Mammography | Covered # | Excluded # | Target Pop. | Ratio | Service Code | Req. Ratio |
| Reported Patients: | 31 | 2 | 48 | 67% | Q112A | 65% |
| Detected Patients: | 0 | 1 | 48 | 0% | | |
| Childhood Immunizations | Covered # | Excluded # | Target Pop. | Ratio | Service Code | Req. Ratio |
| Reported Patients: | 2 | | 3 | 67% | | |
| Detected Patients: | 0 | | 3 | 0% | | |
| Colorectal Cancer Screening | Covered # | Excluded # | Target Pop. | Ratio | Service Code | Req. Ratio |
| Reported Patients: | 30 | 0 | 73 | 41% | Q120A | 40% |
| Detected Patients: | 0 | 0 | 73 | 0% | | |

Hamilton Family Health Team





Downloading Queries

Users can query their EMR data to target patient populations. To access the query feature, click Bullseye > Reports > Query Builder (Alerts).

| | 2016-Dec-13 at | . His mother had colon cancer at age 54 The patient has had a previous | his | | | | | |
|----|----------------|--|-----|--|--|--|--|--|
| | File | Apply Insurer Payments | | | | | | |
| | Scheduler | Repliform CSV Export | gar | | | | | |
| | Tools | Lab Matching Reconciliation Report | | | | | | |
| | Reports | Outstanding Requisitions, Referrals and Orders | | | | | | |
| | Billing | Query Builder (Alerts) | d t | | | | | |
| | Users | hi h | m | | | | | |
| | Help | | | | | | | |
| | Backup | | | | | | | |
| | CDS | | | | | | | |
| BE | Configuration | | | | | | | |
| Ē | | | | | | | | |
| Â | | | | | | | | |
| | ACCURO | | _ | | | | | |
| - | | | | | | | | |

Accuro maintains an online repository, sometimes referred to as 'the Cloud' or 'Alert Publisher', consisting of queries that users have published/uploaded for sharing.

From the alert definitions window, users can access Accuro's online repository in order to search and/or publish queries by clicking on the 'Alert Publisher' option at the bottom right as highlighted below.

In the alert definition publisher window, users can simply click the search magnifying glass to view all published alerts. Alternatively, users can enter a keyword and/or publisher to filter their results.



To download a published alert, click on the desired alert > click 'Download Alert' at the bottom right > click 'OK'.

| ¢ | Alert | Definition Pul | olisher | x | | | | |
|-------------------------------|---------------|----------------|------------|---------------|--|--|--|--|
| Download Alert | s Publish Ale | rts | | | | | | |
| Search mammogram PublisherAll | | | | | | | | |
| T donotici - 74 | 1 | 1 | | | | | | |
| Alert | Description | Date | Publisher | Keywords | | | | |
| emily test | Mammogra | 2016-Nov-10 | CWCPCN | ASAP | | | | |
| mammogram | TEST | 2014-May-23 | kpierson | Test | | | | |
| Mammogra | | 2015-Feb-26 | Adam Sinai | | | | | |
| Mammogra | | 2015-Feb-26 | Adam Sinai | | | | | |
| Mammogra | | 2015-Feb-26 | Adam Sinai | | | | | |
| PIN PREV | | 2011-Apr-13 | Scott | | | | | |
| | | | | | | | | |
| | | | Do | ownload Alert | | | | |

| ¢ | | Alert | Definition Pul | olisher | | x | | |
|--------------------------------|-------|-------------|----------------|---------------|--------------|---|--|--|
| Download Alerts Publish Alerts | | | | | | | | |
| Search mammogram | | | | | | | | |
| PublisherAll v | | | | | | | | |
| Alert | | Description | Date | Publisher | Keywords | | | |
| emily test | | Mammogra | 2016-Nov-10 | CWCPCN | ASAP | | | |
| mammog | ram ' | TEST | 2014-May-23 | kpierson | Test | | | |
| Mammogi | ra | | 2015-Feb-26 | Adam Sinai | | | | |
| Mammog | ra | | 2015-Feb-26 | Adam Sinai | | _ | | |
| Mammog | a | | | X | | - | | |
| PIN PREV | · | | Message | _ | · | _ | | |
| | | () Aler | t downloaded s | successfully. | | | | |
| | | | ОК | | | | | |
| | | | | | - | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | D | ownload Aler | t | | |
| | | | | | | | | |

The published alert will now appear in your alert definition list. Click to highlight the downloaded alert > click 'Run Report' at the bottom right.

| ¢ | Ale | rt Definitions | • × |
|----------------------------|--|---|-------|
| Existing Definitions | Mammogram - exclusion codes | | |
| Filter Visible Definitions | Current Rules | | |
| gfd 🏫 ^ | Surgical/Medical History History Contain | is 'Mastectomy' | |
| HRM - MD Check | Bill Procedure Code = 'Q141' | | |
| HRM Demo 😭 | | | |
| HRM VAlidation | 0 ° | | |
| immu 🚖 | | | |
| JL Prescription Search | New Rule | Manage Rule | |
| k030 | Rule Category Demographics V | None Add Rule Remove I | Rule |
| k030mel | | Doesn't Match Patient Records Only Optional Instances | 1 🕆 |
| | Address | | |
| Mammogram - exclusion c | City | | |
| Mammogram - Recall | Deceased | | |
| Master OMD Active patient | Default Insurer | | |
| Master OMD Active patient | Email Address | | |
| Master OMD current smok 😭 | Employer | | |
| Master OMD current smok 😭 | Enrolled Date | | |
| Master OMD Current Smok 🏫 | Enrolled Provider | | |
| Master OMD Current Smok 🏫 | Family Phys. | Create or Select a Rule to Manage | |
| Master OMD Current Smok 🏫 | Flags | | |
| Master OMD Current Smok 😭 | Global Message | | |
| Master OMD Dm Patients 🏫 | Next of Kin | | |
| Master OMD DM Patients | Occupation | | |
| Master OMD DM Patients | Office Provider | | |
| Master OMD DM Patients | Official Language | | |
| Master OMD DM Patients | Paper Chart ~ | | |
| | | | |
| Last Report Ran: Never | | Image: Provide a comparison Run Report | Close |
| | | | |



Click 'All Patients' or Selected Providers' Patients' and highlight the applicable physician(s) > right-click or double-click to include or exclude 'Fields to Display' > click 'Run'.

| Current Ru | ies | | cherva | 103 | | |
|---|--|------------------|---|--|--|---------|
| Surgical/ | Check for Alert Matches | × | gical/ Proc | Check for Aler | t Matches | |
| New Rt Rule Ca Address Carecar City Deceass Default Email Ac Employe Enrollec Enrollec Family F File Nun Flaos | Mammogram - exclusion codes Apply Against ● All Patients ● Selected Providers' Patients ● Physician Abraham, Adriane Arguette, Adam Banner, Lisa Broiin, Brandon Cantu, Bernita Ciatardoni, Tuyet Colgate, Dawna Counts, Ronny Cuting, Kirga | Iude Field Optic | y e Ca dress recar y ceas fault auit A iploye rolled rolled mity F s Nun igs | Mammogram - exx Apply Against All Patients Selected Providers' Patients Physician Abraham, Adriane Arispe, Esteban Banner, Lisa Boca, Brianna Brolin, Brandon Cantu, Bernita Clafardoni, Tuyet Colgate, Dawna Counts, Ronny Cruz, Christian Cutting, Kica | Elusion codes ields to Display Surgical / Medical History History Date Resolved Date Negative History History Note History Details Exclu | nly Opt |
| Global N Next of I Occupa Office P Official I Paper Ch | Match Types to View Unassigned Assigned Completed Run Cance | | obal N xt of I cupa îce P îcial I per Ch | Match Types to View I Unassigned Assignant | ned Completed | |

In the results, users can select individual patients by clicking on a single row. Holding the shift key while clicking rows allows users to select multiple rows one at a time.

| 1 | | | | | 1 | | 2 Daliast Otahus | 1 1 | | |
|-------------|------------|---------------|-----------|-----|----------------|----------------|------------------|------------------|--------------|-----------------|
| ð 1 | | Alert Matches | | | | | | | | |
| | | | | | Mammogram - e | exclusion code | 85 | | | |
| Last Name F | First Name | PHN | Birthdate | Sex | Home Phone | Status | History | Negative History | History Note | History Details |
| | | | | F | (_) | Unassigned | Mastectomy | False | | |
| | | | | F | (000) 000-0000 | Unassigned | Mastectomy | False | Double | |
| | | | | F | (905) 788-1942 | Unassigned | Mastectomy | False | | |
| | | | | P | <u>[[]]</u> | | | | | 1 |

Clicking the first patient you wish to select and holding the control key when clicking the row at the bottom of the patients you wish to select will highlight the group.

Clicking on a single row in the list and hitting the control key and A simultaneously will highlight all the results in the list.

| Last Name | First Name | PHN | Birthdate | Sex | Home Phone | Status | History | History Note | History Details |
|-----------|------------|-----|-----------|-----|----------------|------------|------------|--------------|-----------------|
| | | | | F | (| Unassigned | Mastectomy | | |
| | | | | F | (000) 000-0000 | Unassigned | Mastectomy | Double | |
| | | | | F | (905) 788-1942 | Unassigned | Mastectomy | | |
| | | | | | | | | | |

Hamilton Family Health Team

Various actions can be applied to all or select patients by highlighting them in the list of results and applying an action as illustrated below.

| Ψ. | | | | | Alert Matches | | | | × |
|-------------------------|--|--|-----------|----------|------------------|------------|------------|--------------|-----------------|
| | | | | Mamm | ogram - exclusio | n codes | | | |
| Last Name | First Name | PHN | Birthdate | Sex | Home Phone | Status | History | History Note | History Details |
| Concession in which the | Statement of the local division of the local | And in case of the local division of the loc | | F | (| Unassigned | Mastectomy | | |
| | | | | F | (000) 000-0000 | Unassigned | Mastectomy | Double | |
| | | | | F | (905) 788-1942 | Unassigned | Mastectomy | | |
| | 3 Matches | - Select Action | - | ¥ (| Completed | Rerun Pri | nt All Exp | ort Close | |
| | 1010 100 1000 | Timeses and the second | e : | | | | | 1 | - |
| | 3 Matches | - Select Action | - | ~ (| Completed | Rerun Pri | nt All Exp | Close | |
| | 3 Matches | - Select Action - Select Action Create Task | - 6 | • (^ | Completed | Rerun Pri | nt All Exp | ort Close | |
| | 3 Matches | - Select Action - Select Action Create Task Apply Vaccine | - - 13 | • (^ | Completed | Rerun Pri | nt All Exp | ort Close | |
| | 3 Matches | - Select Action - Select Action Create Task Apply Vaccine Create Notes | - | ✓ (| Completed F | Rerun Pri | nt All Exp | ort Close | |
| | 3 Matches | - Select Action - Select Action Create Task Apply Vaccine Create Notes Create Forms | - 13 | • (^ | Completed F | Rerun Pri | nt All Exp | Close | |
| | 3 Matches | - Select Action - Select Action Create Task Apply Vaccine Create Notes Create Forms Create Bill | - | ~ | Completed F | Rerun Pri | nt All Exp | Close | |
| | 3 Matches | - Select Action Create Task Apply Vaccine Create Notes Create Forms Create Bill Set Patient Sta | tus | ▼ (^ | Completed F | Rerun Pri | nt All Exp | Close | |



CCO Primary Care Lead (HNHB LHIN)

these

Creating Custom Queries

Users can define their own alert definitions to query their EMR data.

To access the query feature, click Bullseye > Reports > Query Builder (Alerts).



To create a new query, in the Alerts Definition window, click the green + in the bottom left > name the query > click 'OK'.

| \$ | | Alert Definitio |
|---|--|---|
| Existing Definitions | Alert Definitions | |
| Filter Visible Definitions | Current Rules | |
| Input Enter a name for the New Definition OK C | New Rule Rule Category Demographics Address Carecard City Deceased Default insurer Email Address Employer Enrolled Provider Family Phys. File Number rew Alert Definition: Cancel | Manag -None- Doet |
| No Alert Definition Loaded | | |
| | | |



The newly name query will now appear in the 'Existing Definitions' list on the left-hand side and will be in focus (highlighted blue). To the right, users can define the parameters of their query by adding rules.

| \$ | Alert Definitions |
|---|--|
| Existing Definitions PCB - Influenza Current Rules Suture - Active Enrolled Provider = 'Arispe, Esteban' Age Older Than 64 Years 11 Months Date Administered Between 2017-Oct-01 a New Rule Rule Category Demographics Address Carecard City Deceased Default insurer | and 2018-Jan-31 AND Vaccine/Immunization = Inf Manage Rule None Doesn't Match |

Illustrated in the series of steps below, we will create an Influenza search. The first rule is that the patients must be active.

To the right of the words 'Rule Category' in the 'New Rule' section, click the down-arrow and select 'Demographics' > under 'Rule Category' click 'Patient Status' > in the 'Manage Rule' section to the right, click 'New' > click the drop-arrow in the status field and select 'Equals' > click the drop-arrow in the blank field next to 'Equals' and select 'Active' > click 'Add Rule' in the top right of the 'Manage Rule' section.

| | o ° | |
|---|--|---|
| <u>-</u> | New Dule | Managa Dula |
| | Rule Category Demographics V | Patient Status Add Rule Remove Rule |
| 1 ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ | Patient Alias ^ Patient Cohorts ^ Patient Name ^ Patient Status ^ Patient Status History ^ Patient Suffix ^ Pharmacy ^ Phone Number ^ Postal Code ^ Primary Care ^ Portione Date ^ | □ Doesn't Match □ Patient Records Only □ Optional Instances 1 - |
| <u></u> | Referral Date | |
| | New Rule | Manage Rule Patient Status Add Rule Remove Rule |
| | Patient Alias ^ Patient Cohorts Patient Name Patient Status | Doesn't Match Patient Records Only Optional Instances 1 |
| 合合合合合 | Patient Status History Patient Suffix Pharmacy Phone Number Postal Code Primary Care | Status: Equals V Active V S |
| | Province or State Referral Date Referring Phys | New |



With 'Demographics' still selected in the 'New Rule' section, under 'Rule Category' click 'Enrolled Provider' > in the 'Manage Rule' section to the right, click 'New' > use the magnifying glass to search for the provider in the 'provider search' window that will open, highlight the provider in the search results and click select > click 'Add Rule' in the top right of the 'Manage Rule' section.

| * ≥ | 00 | | | | |
|--------|--------------------|-------------|--------------------------------|-----------------|---------------|
| 2 | New Rule | | Manage Rule | | |
| 2 | Rule Category Demo | ographics v | nrolled Provider | Add Rule | Remove Rule |
| 8 | Address | | Doesn't Match Deatient Records | Only 🗌 Optional | Instances 1 🗘 |
| 7 | Carecard | | | | |
| 7 | City | | | | |
| 7 | Deceased | | | | |
| 3 | Default Insurer | = | | | |
| 7 | Email Address | | | | |
| 2 | Employer | | | | |
| | Enrolled Date | | | | |
| | Enrolled Provider | | Enrolled Provider: Ba | nner Lisa | |
| 5 | Family Phys. | | | | |
| 5 | File Number | | | 🔁 New | |
| 5 | Flags | | | | |
| 5 | Global Message | | | | |

With 'Demographics' still selected in the 'New Rule' section, under 'Rule Category' click 'Patient Age' > in the 'Manage Rule' section to the right, click the drop-arrow in the 'Age' field and adjust the age parameters accordingly > click 'Add Rule' in the top right of the 'Manage Rule' section.

| | ¢° | |
|-------|----------------------------------|---|
| | New Rule | Manage Rule |
| | Rule Category Demographics v | Patient Age Update Rule Remove Rule |
| | Global Message | Doesn't Match Patient Records Only Optional Instances 1 |
| | Occupation | |
| | Office Provider | |
| | Official Language Paper Chart | |
| | Patient Age | |
| | Patient Alias | |
| | Patient Name | Age: Older Than 	✓ 64 ⁺ Years 11 ⁺ Months S |
| - | Patient Status ≡ | New |
| | Patient Status History | |
| _ ⇒ = | Patient Sumx | |
| | Phone Number | |
| | Postal Code | |
| | Primarv Care | |



To the right of the words 'Rule Category' in the 'New Rule' section, click the down-arrow and select 'Immunizations' > under 'Rule Category' click 'Immunizations' > in the 'Manage Rule' section to the right, click 'New' > click 'Vaccine/Immunization' > begin typing influenza in the vaccine/immunization field, select the immunization from the search results > click 'Add Rule' in the top right of the 'Manage Rule' section.







We want to know who has **NOT** had the influenza vaccine, so with the influenza rule under the 'Current Rules' section selected (evidenced by it being highlighted in blue), in the 'Manage Rule' section, click 'Doesn't Match' and click 'Update Rule'.

When 'Doesn't Match' is applied, the rule will display in red/pink and indicates that the query will produce results opposite to how the rule reads.

10

| Existing Definitions | PCB - Influenza | |
|------------------------------|-------------------------------------|--|
| Filter Visible Definitions | Current Rules | |
| OMD Prev Care Regular se 😭 🔨 | Enrolled Provider - Misson Estabart | ^ |
| OMD1 - All Patients 🚖 | Are Older Than 64 Years 11 Months | |
| Opiod 🚖 | Date Administered Between 2017-Oct | -01 and 2018_lan-31 AND Vaccine/Immunization = Influenza |
| Pap not done in last year 👘 | 2 ⁰ | |
| PCB - FOBT | ~ | |
| PCB - Influenza 😭 | New Rule | Manage Rule |
| PCB - Mammo | Rule Category Immunizations | Immunizations Update Rule Remove Rule |
| PCB - Pap 👘 | Rule category | |
| PEFHT Delinquent Patients 1 | Immunizations | Doesn't Match Patient Records Only Optional Instances |
| PIN Prevention Influenza | | |
| prob 🛱 | | |
| Pt/appt types-MB-OMD | | |
| query 🛱 | | |
| query forc px 😭 | | |
| Rostered Patients | | |
| Sanoti- HeFH | | |
| Summerville FHT - Demo | | |
| Summerville FHT - Demo (2) | | |
| Summerville FHT - Demo 3 T | | 10/01/2017 |
| | | Date Administered: Between v |
| test 2 | | 01/31/2018 |
| testa (4 | | |
| tet 🗠 | | Vaccine/initiatization. |
| TP - Temp | | O New |
| Unbilled natients | | |
| | | Overdue Vaccinations |
| | | Exclude Optional Vaccinations |
| | | |
| | | |
| | | |
| * | | Alert barnitions |
| Exist | ing Definitions | PCB - Influenza |
| 10 miles | Visible Definitions | A second B size |
| 1.100 | Course Section and | Current Rules |
| | <u>^</u> | Status = 'Active' |
| | | Enrolled Provider = 'Arisno Esteban' |

| <u>(</u> | Status = 'Active' Enrolled Provider = 'Arispe, Esteban' Age Older Than 64 Years 11 Months Date Administered Between 2017-Oct-01 and 2018-3 | an-31 AND Vaccine-Immunization = Influenza | |
|--------------|---|--|----------------------|
| | New Rule Rule Category Demographics v | Manage Rule None | Add Rule Remove Rule |
| *Buinforma 👾 | Address ^ Carecard City Deceased Default insurer Email Address | Doesn't Match Patient Records Only | Optional Instances |

Upon completion of building the criteria for the influenza search, click 'Run Report' in the bottom right of the window.

| OntarioMD | CCO Primary Care Lead |
|--|---|
| ser3 | Run Comparison Run Report Close |
| cupation fice Provider ficial Language per Chart tient Age | |
| obal Message st of Kin | |
| 105 | |

Hamilton Family Health Team

e care, together

Click 'All Patients' or 'Selected Providers' Patients' and highlight the applicable physician(s) > right-click or double-click to include or exclude 'Fields to Display' > click 'Run'.

| PCB | - Influenza | A. | - | Check fo | r Alert Matches | × |
|---|---|----|--|---|---|-------------------|
| pply Against O All Patients Selected Providers' Patients | Fields to Display Patient Status Findle de Provider Last Name | | Net Rule Apply Age Adc O All Pa | PCE linst lients | Fields to Display | Add Rule Optional |
| PP Physician Physician Argadeta, Adriane Argadeta, Addane Arguette, Adam Banner, Lisa Boca, Brianna Brolin, Brandon Cantu, Bernita Colgate, Dawna Counts, Ronny Cruz, Christian Cruz, Christian Cutton, Vira. | Patient Age | ٥N | City Select City Select Des Abraham Der Abraham Der Abraham Der Arquette Em Banner, Enn Bora, B Fale Ciafardo Ciafardo Ciafardo Ciagate, Nex Counts, Nex Counts, | ciain Adriane Adriane Steban Adriane Steban Adriane Steban Steban Adriane Isa anna andon semita anti Tuyet Dawna Coony Statan Stran | Enroled Provider Last Name Enroled Provider Last Name Enroled Provider Last Name Enroled Provider First Name Denroled Provider First Name De | o Manage |
| atch Types to View | Assigned Completed | | Par Pat | Unassigned | Assigned Completed | |

In the results, users can select individual patients by clicking on a single row. Holding the shift key while clicking rows allows users to select multiple rows one at a time. Clicking the first patient you wish to select and holding the control key when clicking the row at the bottom of the patients you wish to select will highlight the group. Clicking on a single row in the list and hitting the control key and A simultaneously will highlight all the results in the list.

| ¥. | | | | | MAR | ert Ma | iones | | |
|-----------|------------|--------------------------|------------|-----|------------|-----------|------------|----------------|-----------------------------|
| | | | | | PCE | 3 - Infli | uenza | | |
| Last Name | First Name | First Name PHN Birthdate | | Sex | Home Phone | | Status | Patient Status | Enrolled Provider Last Name |
| | | | | F | L) - | | Unassigned | Active | Arispe |
| | | | | F | () - | | Unassigned | Active | Arispe |
| | | | | M | (_) | <u></u> | Unassigned | Active | Anspe |
| | | | | M | (_) | | Unassigned | Active | Arispe |
| | | | | F | <u> </u> | | Unassigned | Active | Arispe |
| | | | | M | | | Unassigned | Active | Arispe |
| | | | | M | (_) | | Unassigned | Active | Альре |
| | | | | M | (_) | | Unassigned | Active | Альре |
| | | | | M | <u> </u> | | Unassigned | Active | Arispe |
| | | | | M | <u> </u> | 1 | Unassigned | Active | Альре |
| | | | | F | | | Unassigned | Active | Arispe |
| | | | | M | (_) - | 100 | Unassigned | Active | Arispe |
| | | | | F | (_) | | Unassigned | Active | Arispe |
| | | | | M | <u> </u> | <u></u> | Unassigned | Active | Artspe |
| | | | | M | (_) | _ | Unassigned | Active | Anspe |
| | | | | M | U - | | Unassigned | Active | Anspe |
| | | | | M | (_) | | Unassigned | Active | Anispe |
| | | | | M | L) | | Unassigned | Active | Arispe |
| | | | | F | () · | | Unassigned | Active | Альре |
| | | | | M | () · | - | Unassigned | Active | Anspe |
| | 50 | Matches - Selec | t Action - | | ~ Com | pleted | Rerun | Print All | Export Close |

| 2 | | | | | | Alert M | atches | | |
|----------|------------|-----|-----------|-----|------------|-----------|------------|----------------|-----------------------------|
| | | | | | | PCB - Int | lluenza | | |
| ast Name | First Name | PHN | Birthdate | Sex | Home | Phone | Status | Patient Status | Enrolled Provider Last Name |
| | | | | F | 0 | | Unassigned | Active | Anspe |
| | | | | Ŧ | ()_ | | Unassigned | Active | Artspe |
| | | | | M | () | - | Unassigned | Active | Arispe |
| | | | | M | () | | Unassigned | Active | Arispe |
| | | | | F | <u></u> | 1.4 | Unassigned | Active | Arispe |
| | | | | M | () | - | Unassigned | Active | Arispe |
| | | | | M |) | - | Unassigned | Active | Arispe |
| | | | | M | ()_ | - | Unassigned | Active | Anspe |
| | | | | M | 0 | 17.4 | Unassigned | Active | Anspe |
| | | | | M | <u> </u> | 1.4 | Unassigned | Active | Anspe |
| | | | | Ŧ., | () | - | Unassigned | Active | Anspe |
| | | | | M | ()_ | - | Unassigned | Active | Arispe |
| | | | | F | ()_ | | Unassigned | Active | Arispe |
| | | | | M | 0 | | Unassigned | Active | Arispe |
| | | | | M | () | - | Unassigned | Active | Anspe |
| | | | | M | <u></u> | - | Unassigned | Active | Anspe |
| | | | | M | ()_ | - | Unassigned | Active | Anspe |
| | | | | M | <u></u> | | Unassigned | Active | Arlspe |
| | | | | F | C)_ | 14 | Unassigned | Active | Anspe |
| | | | | M | 0 | | Unassigned | Active | Anspe |





Various actions can be applied to all or select patients by highlighting them in the list of results and applying an action such as creating tasks, bills, statuses, flags, cohorts and more for selected patients.

| | ~ | 44 years | olo male | | | | | | | Filler All items |
|----------|--------------|------------|-----------|-------------------|-----|-----|----------|------------|----------------|-----------------------------|
| * | | | | | | | Alert M | latches | | |
| | | | | | | | PCB - In | fluenza | | |
| Last Na | me | First Name | PHN | Birthdate | Sex | Hor | ne Phone | Status | Patient Status | Enrolled Provider Last Name |
| - | | | | | F | 0 |) - | Unassigned | Active | Arispe |
| | | | | | F | (|) - | Unassigned | Active | Arispe |
| | | | | | M | (|) - | Unassigned | Active | Arispe |
| | | | | | M | (|) - | Unassigned | Active | Arispe |
| | | | | | F | (|) | Unassigned | Active | Arispe |
| | | | | | M | (|) - | Unassigned | Active | Arispe |
| | | | | | M | (|) - | Unassigned | Active | Arispe |
| | | | | | M | (|) | Unassigned | Active | Arispe |
| | | | | | M | 6 |) | Unassigned | Active | Arispe |
| | | | | | M | (|) - | Unassigned | Active | Arispe |
| | | | | | F | (|) - | Unassigned | Active | Arispe |
| | | | | | M | (|) | Unassigned | Active | Arispe |
| | | | | | F | C |) | Unassigned | Active | Arispe |
| | | | | | M | (|) | Unassigned | Active | Arispe |
| | | | | | M | (|) | Unassigned | Active | Arispe |
| | | | | | M | C |) | Unassigned | Active | Anspe |
| | | | | | M | (|)(| Unassigned | Active | Arispe |
| | | | | | M | (|) | Unassigned | Active | Arispe |
| | | | | | F | (|) - | Unassigned | Active | Arispe |
| | | | | | M | (|) | Unassigned | Active | Arispe |
| | | 5 | 0 Matches | - Select Action - | | * | Complete | d Rerun | Print All | Export Close |
| | V . U | | | - Select Action - | | ~ | er ander | | | |
| Systolic | 12.1 | 2 | | Create Task | N | | | | | |
| 10 | 0.065 | 0.067.8.7 | 7 | Apply Vaccine | 20 | | | | | |
| | 0.065 | | | Create Notes | | = | | | | |
| | | | | Create Forms | | | | | | |
| | | | | Create Bill | | | ~ | | | |



Creating & Assigning to Cohorts

Users may wish to create a patient cohort listing the patients due for an influenza vaccine to have an office member action.

To create a patient cohort for the list of patients generated by a query, select all or some of the patients in the list, click the 'Select Action' drop-arrow > click 'Create Patient Cohort'.

| \$ | | | | | | Alert M | atches | | | > | × |
|---|------------|---------|---|-------|-----|-----------|------------|----------------|-----------------------------|------------|---|
| | | | | | | PCB - Inf | fluenza | | | | |
| Last Name | First Name | PHN | Birthdate | Sex | Hor | ne Phone | Status | Patient Status | Enrolled Provider Last Name | Birthdate | |
| and the second se | 1 | - | and the second se | F | C |) - | Unassigned | Active | Arispe | 02/23/1945 | ^ |
| | | | | F | (|) - | Unassigned | Active | Arispe | 10/02/1952 | |
| | | | | M | 0 |) - | Unassigned | Active | Arispe | 05/02/1940 | |
| | | | | M | C |) -> | Unassigned | Active | Arispe | 05/28/1919 | |
| | | | | F | 0 |) | Unassigned | Active | Arispe | 12/25/1921 | Ξ |
| | | | | M | 0 |) | Unassigned | Active | Arispe | 06/08/1935 | |
| | | | | M | 0 |) | Unassigned | Active | Arispe | 09/21/1929 | |
| | | | | M | (|) - | Unassigned | Active | Arispe | 11/23/1922 | |
| | | | | M | 0 |) - | Unassigned | Active | Arispe | 09/01/1933 | |
| | | | | М | (|) | Unassigned | Active | Arispe | 10/31/1926 | |
| | | | | F | (|) | Unassigned | Active | Arispe | 04/27/1920 | |
| | | | | M | (|) | Unassigned | Active | Arispe | 12/07/1927 | |
| | | | | F | (|) | Unassigned | Active | Arispe | 11/13/1952 | |
| | | | | M | (|) | Unassigned | Active | Arispe | 11/24/1937 | |
| | | | | M | (|) | Unassigned | Active | Arispe | 03/06/1926 | |
| | | | | M | (|) | Unassigned | Active | Arispe | 04/30/1931 | |
| | | | | М | (|) | Unassigned | Active | Arispe | 09/30/1950 | |
| | | | | M | (|) | Unassigned | Active | Arispe | 11/13/1918 | |
| | | | | F | (|) | Unassigned | Active | Arispe | 10/07/1943 | |
| | | | | M | (|) | Unassigned | Active | Arispe | 01/14/1924 | ~ |
| | 50 | Matches | - Select Action - | | * | Complete | d Rerun | Print All | Export Close | | |
| | | | Apply Vaccine Create Notes Create Forms Create Bill Set Patient Status Assign Flag Assign to Patient C | ohort | | | | | | | |

Select the provider to whom the cohort belongs and name the cohort.

| > | | | | | Alert M | atches | | | |
|-----------|--|-----|-----------|---------|--------------------|------------|----------------|-----------------------------|------------|
| | | | | | PCB - Inf | luenza | | | |
| Last Name | First Name | PHN | Birthdate | Sex | Home Phone | Status | Patient Status | Enrolled Provider Last Name | Birthdate |
| | | | | F | (_) | Unassigned | Active | Arispe | 02/23/1945 |
| | | | | F | (_) | Unassigned | Active | Arispe | 10/02/1952 |
| | | | | M | (_) | Unassigned | Active | Arispe | 05/02/1940 |
| | | | | M | (_) | Unassigned | Active | Arispe | 05/28/1919 |
| | | | | F | | Unassigned | Active | Arispe | 12/25/1921 |
| | | | | | () | Insectored | Active | Arispe | 06/08/1935 |
| | | | | | Create Patie | ent Cohort | | spe | 09/21/1929 |
| | Create Patient Cohort ppc 000 spe Provider Arispe, Esteban v Cohort Name Pts to call for flu shot spe 100 | | | | | 11/23/1922 | | | |
| | | | | vider | Arispe, Estel | spe | 09/01/1933 | | |
| | | | Col | hort Na | ne Pts to call for | flu shot | | spe | 10/31/1926 |
| | | | | | | 1 | | spe | 04/27/1920 |
| | | | | | OK | Cancel | | spe | 12/07/1927 |
| | | | | 0 | | | | spe | 11/13/1952 |
| | | | | M | (_) | Unassigned | Active | Arispe | 11/24/1937 |
| | | | | M | <u> </u> | Unassigned | Active | Arispe | 03/06/1926 |
| | | | | Μ | | Unassigned | Active | Arispe | 04/30/1931 |
| | | | | M | (_) | Unassigned | Active | Arispe | 09/30/1950 |
| | | | | M | (_) | Unassigned | Active | Arispe | 11/13/1918 |
| | | | | F | <u>(_)</u> | Unassigned | Active | Arispe | 10/07/1943 |
| | | | | M | () - | Unassigned | Active | Arispe | 01/14/1924 |



Hamilton Family Health Team





Managing Cohorts

Users access cohorts through the EMR patient module. To manage cohorts, click the 'Manage Cohorts' function at the bottom left of the patient view > select physician from the provider drop-arrow > select desired cohort and names of patients currently in the cohort displays below. As appropriate, patients can be added and removed from the cohort.

| Accuro CMS4 2017.01 - *** Ontario MD Testing Environment *** | × |
|---|----------------|
| 🛛 💿 🔮 🛱 Patient: Middleton, Kate 1973-Jun-21 (44 Yr male) 5555 555 5555KC (905) 788-1492 Enrolled | Toronto Office |
| Allergy. | OMD User 3 |
| Last Na Middleton Health # Search Only | |
| First Name Kate 🛃 Identifier Search Only | |
| Middle Name Elizabeth Birthdate MM/DD/YYYY Image: Comparison of the second | |
| 1 Title: Mr. v Suffix v Patient Status: Active v Office Provider: Arispe, Esteban | |
| Demographics Other Relationships Notes Status History Provide Billing Insurer Rules Provider Enrollment History | |
| Q Alas | ^ |
| S SSSSSSSSSC ON, Canada v Expiry MM/DD/YYYY File Number | |
| Birthdate 06/21/1973 44 Yr Gender M · Deceased MM/DD/YYYY | |
| Family Phys Arispe, Esteban . Referring Phys -None- | |
| Address 1 Palace Way, Apt 101 Note v | |
| City London ON, Canada v Postal/Zip NOL 21/2 Type [Residence v | |
| Phone #s: Home (905) 788-1492 Work (000) 000-0000 Cell (000) 000-0000 Fax (000) 000-0000 Preferred Contact Method v | |
| Email Address: katile peter@ontariomd.com Check for Duplicates | Ξ |
| Default Insurer OHIP v | |
| Pharmacy Contact -None | |
| Primary Care | |
| Last Updated: 2018-Jan-23 by OMD User 1 (Toronto Office) | |
| □ 22 1 2834 Admission Date MM/DD/YYYY Discharge Date MM/DD/YYYY Master Number [0] None ▼ | |
| Current Enrolleent Status Enrolled (Arispe, Esteban) | e Enrollment |
| Manage Cohorts Delete Patient Patient Relationships Merge Update Patient Clear (F1) | |
| | |
| | |

1

| × | | Manage Patient Co | ohorts |
|-------------|-----------------------|-------------------|--------------------------------------|
| Provider | Arispe, Estebar | 1 | v |
| Cohorts | | | |
| DM (1) | | | 2 |
| Tony Te | est 18+ (533) | | |
| Pts to c | all for flu shot (50) | | |
| | | | |
| 0 | 1 | | |
| | | | |
| Patients | s of Cohort | | |
| Patient | Name | Birthdate | Health # |
| 1 | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| 0 | 0 | | |
| | 0 | | OK Cancel |
| -0 | 0 | | OK Cancel |
| ispe, Estel | O ban) | | OK Cancel |
| ispe, Este | San) Manage Cohort | s Delete Patient | OK Cancel Patient Relationships Merg |

| Ŷ | | manage Patient Co | | |
|----------------|----------------|-------------------|--|--------|
| Provider | Arispe, Estet | ban | | |
| Cohorts | | | | |
| DM (1) | | | | |
| Tony Test | 18+ (533) | lest) | | |
| F. Pts to call | ior nu shot (4 | 9) | | |
| ta | | | | |
| | 0 | | | |
| | | | | |
| Ca Patients of | Cohort | | | _ |
| r Patient Na | ime | Birthdate | Health # | |
| | | | and the second sec | 1 |
| | | | | - |
| | | | | - |
| | | | | -1 |
| 7 | | | | |
| | | | | |
| 1 | | | | _ |
| | | | | - |
| | | | | - |
| Q | | | | |
| | | | | |
| Wine and the | 100 | 162000002 | W2.50000 | |
| 00 | | 100 | 2011 | 1 |
| - | 5 | | 01 | 2.2 |
| | | | | 222210 |



CCO Primary Care Lead (HNHB LHIN)

(44 Yr male) 5555 555 555KC (905) 788-1492 Enrolled

Tracking

Accuro has built-in tracking functionality that identifies outstanding preventive care.

If 'Tracking' is not enabled in your EMR, in the bottom left of the encounter notes section of a patient chart, you will only see only the word 'Tracking' with a cogwheel icon next to the 'Tracking' function.

To enable tracking, click on the cogwheel icons to the right of the word 'Tracking'.



In the 'Tracking options' window that opens, click 'Enable Tracking' > once tracking is enabled, any tracking categories listed will be active however if no tracking categories are listed, click the green +, select the categories to track and click 'Add' > click 'OK'.





As illustrated in the following examples, the tracking functionality reports that this patient is due on 3 preventive care as the associated mapped QCodes/billing codes are not detected.

Clicking on the magnifying glass next to the item(s) in the tracking section lists the items the patients shows as overdue.

| 7223 | Accuro CM54 2017.01 - ***1 | ontano morresung environment "" | | |
|--|--|---|--|--------------------------------|
| Patient: Middleton, Ka | ate 1960-Jun-21 (57 Yr female) 5555 555 555KC (905) 788-1492 Enrolled | | | Toronto |
| Day Sheet Encounter Note | PS Chronic Conditions Virtual Chart Medications Patient Information | | | 4 0M |
| Patient 💙 Middleton, Kate | 57 years old female | FilterAll Items V P | rovidersAII | |
| Future | NYGH - Medical Imaging | - O = | õ 🖹 14 🔒 🔗 | 0 |
| 2018-Oct-17 at 8:45am | Notes | hand to be a first of the second s | | 10-01 |
| Fibromyalgia | 2017-Nov-21: Letter | | Lifestyle | |
| B Cantu | Provider: Larsen, Darren | | 2016-Aug-10 Dilated | d Eye Exam |
| Bast | Please see Kate, a 44 year old for Relevant findings and investigations are | attached. Please do not hesitate to contact me if you have any questions | antai Status (Mari | rieaj |
| 2017 Jul 20 at 9:10am | regarding the care of Kate. Problem History: ESSENTIAL HYPERTENSIO Surgical/Medical | N, OSTEOPOROSIS, ASTHMA, DIABETES MELLITUS | Family History | |
| CPX | 2047 Neu 24: Deferrel Letter | | None Recorded | |
| E Arispe | Provider: Larsen, Darren | | Risk Factors | |
| 250 | Please see Kate, a 44 year old for Relevant findings and investigations are | attached. Please do not hesitate to contact me if you have any questions | 2016-Aug-10 Dilate | ed Eye Exam [] |
| 2017-Feb-13 at 12:00pm | regarding the care of Kate. Problem History. ESSENTIAL HYPERTENSIO | N, OSTEOPOROSIS, ASTHMA, DIABETES MELLITUS | Marital Status [] | |
| CPX | Surgical/Medical | | None Recorded | |
| G Farra | 2017-Nov-06: Clinical Note | | Alerts | |
| 0 | Email Message Hi Kate , the results from your last mammo was normal. See | you in a couple of years. Thanks, Dr. Y | None Recorded | |
| 2017-Feb-13 at 11.45am | 2047 Nex OC Operations | you in a couple of yours. Fridings of A. | Patient Notes | |
| G Farra | Provider, Larsen, Darren | | None Recorded | |
| 0 | Email Message. Hi Kate - the results from your last mammo was normal. See | you in a couple of years. Thanks. Dr. X | Rereanal History | 4 |
| 2017-Jan-30 at 1:45pm 🔍 | 2017-Oct-24: Clinical Note | | Personal History | a Gara (mandad) |
| Follow Up, 4/12 RX Refill | Provider: Larsen, Darren | | [HX Type]: Preventativ (Description): EOBT: (| ve Care (regular), (Notes): |
| G Farra | eConsult Message: Please see this patient for | | Hx Category]: Preven | tive Care Tracking |
| 0 | labs | | [Tracking Type]: FOB | T; [Date] |
| | | S M int V P by Results | 2017-01-19; [State]: A | Active |
| Tracking | A1C 0.067.8.7.7 BP - Diastolic 8.8 | | [Type]: Patient Note; [| [To]: OMDUser8 |
| | BP - Systolic 12.12 | | ; [From]: OMDUSER8 | ob.27 |
| (0) Labs | HbA1C 0.065. 0.067. 8. 7.7 | | : [Subject]: Rooming | 60-27 |
| (0) Referrals and Orders | 0.000 | | ; [Note]: When Kate er | nteres te building t |
| (2) CDM Q | | | front desk staff will ro | oom her and the chi |
| ······································ | | | not to draw attention t | that they attend this |
| (3) Preventive Care | | | cimic | |

| Tracking | 00 |
|------------------------|-----|
| (0) Labs | |
| (0) Referrals and Orde | ers |
| (2) CDM | Q |
| (3) Preventive Care | Q |

| | 0 | Provider: Larsen, Darren |
|----------|--|--|
| | 2017-Feb-13 at 11:45am CPX G Farra 0 2017-Jan-30 at 1:45pm (| Outstanding Cumulative Preventive Care This patient meets the criteria for the following Cumulative Preventive Care items which are outstanding. To complete the Cumulative Preventive Care items, bill the appropriate Tracking Q Code. Atternatively, mappings can be configured in Billing -> Cumulative Preventive Care Bonus. |
| | Follow Up, 4/12 RX Refill G Farra 0 | Pap Smear Mammography Colorectal Cancer Screening |
| 22 | Tracking of (0) Labs | |
| i = 2834 | (0) Referrals and Orders | |
| 👗 82 | (2) CDM Q | |
| 2 | (3) Preventive Care | |
| | alada Anna Alada | v |



EMR Medical History Bands

The medical history bands native to Accuro EMR are appropriate to record patient's medical and cancer/prevention screening information. Additionally, related cancer/prevention medical reports should be labeled appropriately in order to easily filter for and identify within the patients virtual chart.

| <u>ه ا</u> | | |
|------------|--|-------|
| Q ^ | History of Problems |) 🥒 🔨 |
| | 2010-Jan-06 GENETIC SUSCEPTIBILITY T MALIGNANT NEOPLASM OF BREAST High Risk | o |
| | Surgical/Medical History | 0 |
| | 2012-Jan-30 Mastectomy [Double] | |
| | Family History | 0 |
| | Diabetes (Brother) | |
| | Lifestyle | 0 |
| | 2017-Mar-30 Smoking Status: Smoker | |
| | Risk Factors | 0 |
| | None Recorded | |

Some physcians have elected to create a custom band to appear within the patient's encounter notes specific for managing Preventive Care.

Note: Custom bands are clinic wide and cannot be deleted once implemented and used and only specific types of bands can be queryied. If a custom band is desired, please contact EMR vendor in advance to discuss considerations and to ensure proper setup.

| \$ | Preventative Care (regular) | |
|------------|------------------------------------|---|
| History | |] |
| Breast | Screening Excluded | |
| Colone | ⇒ st | |
| FIUSH | DI | |
| Hyster | ectomy ~ | 1 |
| Details | ~ | |
| Note | | |
| Date | MM/DD/YYYY | |
| End Date | MM/DD/YYYY | |
| Life Stage | ~ |] |
| | Negative | |
| Delete | Save and New Save and Close Cancel | |
| | | |

| Preventat | ive Care (regular) | 0 |
|-------------|---------------------------|-------|
| 2014-Feb-15 | FOBT | |
| 2012-Jan-30 | Breast Screening Excluded | |
| | | A A A |

