

Clinical Reports: Use Data to Meet Your Practice's Clinical Goals

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Keeping Tabs

- Orders by Visit
- Care Plans by Date

Keeping Tabs

- Orders by Visit
 - Referral tracking without fighting with the Visit Tasks screen
 - Finding and addressing open lab orders
 - Reach Out and Read, e.g.

Keeping Tabs

- Care Plans by Date
 - Who has an active care plan? What is it instructing them to do?

Immunizations

- Vaccine Inventory Reconciliation Worksheet
- Vaccine Inventory Transaction Log
- Immunization Administration Details



Immunizations

- Vaccine Inventory Reconciliation Worksheet
 - Make sure your EHR inventory matches your fridge
 - Now, also see if those lots are expired

Immunizations

- Vaccine Inventory Transaction Log
 - Discover where discrepancies may lie when your fridge doesn't match your EHR inventory
 - Or audit immunization adjustments across all lots (e.g., wastage)

Immunizations

- Immunization Administration Details
 - Quick and easy way to get a lot of information on vaccines administered at your practice

Checking in on Billing

- Visits by Billing Status
 - Preemptively address interruptions in the revenue flow by identifying encounters for which providers have yet to bill, or billers have yet to post
- Billed Diagnoses by Date
 - Ability to find all visits that have had a certain linked billing diagnosis (in any position)
 - Identify and quantify the correlation between CPT codes and ICD-10 codes
 - You can optionally limit this by the CPT code the diagnosis is linked with to further refine your results

Make Your Own!

- In PCC's 8.5 release, you will be able to make your own Patient List reports in the report library
 - More flexible than the Recaller
 - Clinical data is now able to be used alongside traditional Recaller criteria
 - More flexible than the original Patient List reports in the EHR
- Remember, you can always finetune any report - just hit the Customize Report button to set defaults, and change which filters you see when running the report.

Configure Reports for Your Practice

- Give your new report a good title, description, and make sure you know where to find it again
- Turn off filters which aren't useful for your new report, or your office
- Any values you set up while Customizing will become the defaults for the report

Customize Report

Title: Orders by Visit

Description: List of appointments that include selected order types.

Categories: Billing, Clinical, PCMH, Visit

Modify Report Criteria

Display

Appointment Date

Last 30 Days From 04/17/2018 to 05/17/2018

Provider

[Edit](#) All Providers

Location

All Locations

Order Name

[Edit](#) 43 Order Names

Order Status

Not Completed

Diagnosis

[Edit](#) All Diagnoses

Cancel Preview

Configure Reports for Your Practice

- Use the search box in multi-select filters to quickly find only the appropriate items
- 1-click: Select All and Select None

The screenshot shows a window titled "Order Names" with a search filter set to "refer". The window contains a table with columns "Select" and "Order Names". The "Select" column has checkboxes, and the "Order Names" column contains text descriptions for various referral types. The "Select All" and "Select None" buttons are highlighted with a green box. The "Search Filter" box is also highlighted with a green box. The "Cancel" and "Save" buttons are visible at the bottom right.

Select	Order Names
<input checked="" type="checkbox"/>	Referral -
<input checked="" type="checkbox"/>	Referral - Allergy / Immunology - Patient / Caregiver must call to schedule appointment with specialist. Once the appointment is scheduled, call our office 678-8333 and leave a detailed message in Referral Mail Box. Please include patient name, patient date of birth, name of specialist, and date and time of appointment. We must have 3 business days to complete insurance authorization
<input checked="" type="checkbox"/>	Referral - Allergy/Asthma
<input checked="" type="checkbox"/>	Referral - Audiology
<input checked="" type="checkbox"/>	Referral - Cardiology
<input checked="" type="checkbox"/>	Referral - Counseling - Patient/Cargiver must call to schedule appointment with specialist. Once the appointment has been scheduled, call 678-8333 and leave detailed message including patient name, patient date of birth, name of specialist patient will see, and date and time of appointment. We must have 3 business days to complete any insurance authorization.
<input checked="" type="checkbox"/>	Referral - Dermatology
<input checked="" type="checkbox"/>	Referral - Developmental/Behavioral Pediatrics
<input checked="" type="checkbox"/>	Referral - EEG
<input checked="" type="checkbox"/>	Referral - ENT
<input checked="" type="checkbox"/>	Referral - ENT
<input checked="" type="checkbox"/>	Referral - ENT - Patient/Cargiver must call to schedule appointment with specialist. Once the appointment has been scheduled, call 678-8333 and leave detailed message including patient name, patient date of birth, name of specialist patient will see, and date and time of appointment. We must have 3 business days to complete any insurance authorization.
<input checked="" type="checkbox"/>	Referral - Edu Intervention Program

Questions, Comments, Requests?

