What's New with PCC EHR Reports

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Goals

- Learn about new (and old) reports now in PCC EHR
- Explore best practices around customizing and creating reports to fit your practice's needs

Fun Facts - Stats about Reports

- Reports run over 20,000 times between 1/1/19 and 4/26/19
- Top 10 reports by usage (accounts for 14,000+ report runs)
    a. Immunization Administration Details
    b. Vaccine Inventory Reconciliation Worksheet
    c. Patient List
    d. Visits by Billing Status
    e. Huddle Sheet
    f. Immunization Administration Count
    g. Orders by Visit
    h. Vaccine Inventory Transaction Log
    i. Patient Immunization Administration Summary
    j. Portal Users by Appointment Date

New and important reports

- Huddle Sheet
    - Facilitate daily planning for patients
- Preventive Care Recall
    - Ensure that your patient population is being reminded to schedule well visits
- Chronic Condition Recall
    - Provide the best possible care to your patients with complex and chronic conditions by ensuring that they're seen on-time
- Payment Reconciliation
    - Reconcile payments entered into PCC against money received from patients (all without going into partner)

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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.
- Care Plans by Date
  - Who has an active care plan? What is it instructing them to do?
  - Useful for PCMH reporting

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Immunizations

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

Coming soon to a report library near you

- Configure which users can access which categories (and the reports inside of them)
- More data sources to tie disparate reports together
- Performance enhancements

Data Sources

- What are these Data Sources you speak of?
  - Basically, a Data Source is a “super report” with far more filters and columns included than is useful for a report
  - They are intended to have new reports created from them, and they provide additional customization options to their so-called “child reports”
    - Think of them like the list of available fields and filters in srsgen
  - Examples: Patient List, Prescription Activity, and Appointments

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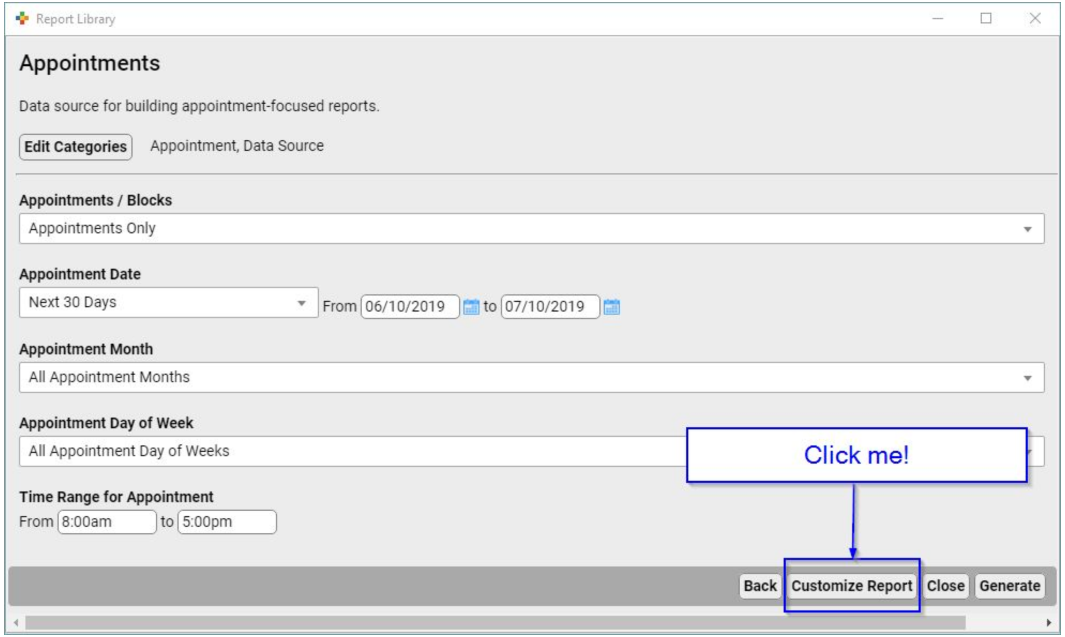
Data Sources

- So what do I do with a Data Source?
  - Create reports from it which are helpful for your practice, using the Customize Report workflow



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Customizing Reports - Overview

- Reasons to consider making a custom report
- Four key tools to use in making a specialized, useful report from a data source
    - Edit Criteria
    - Reorganizing and setting defaults for filters
    - Edit Columns
    - Reorganizing columns, and choosing which columns will be shown

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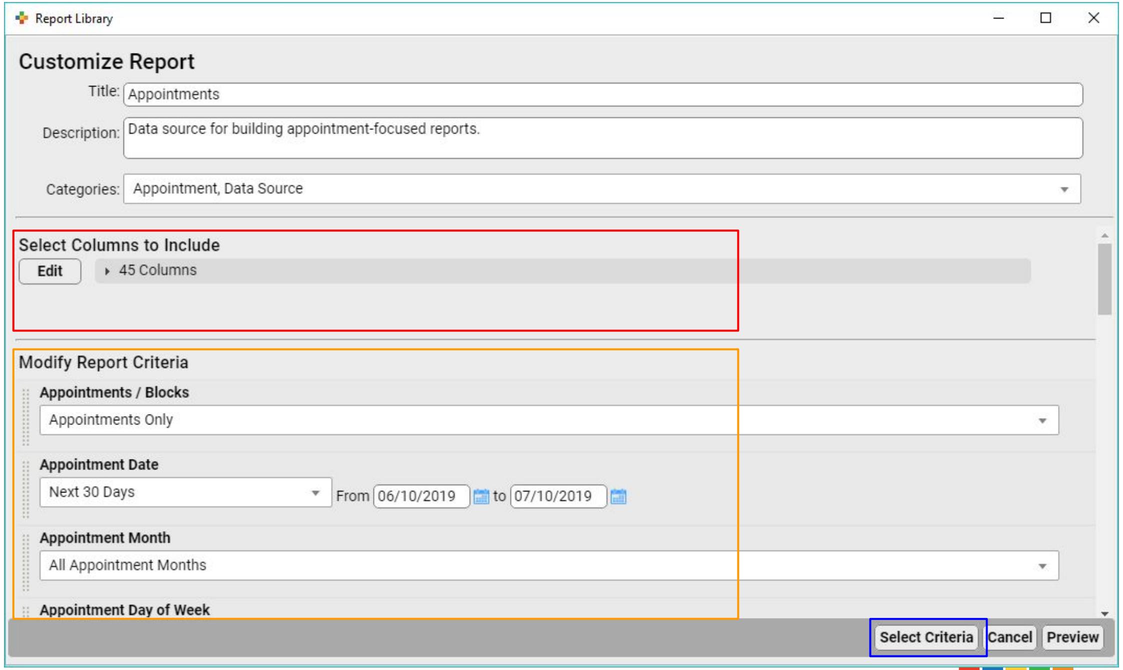
Customizing Reports - Key Tools

Four key tools to use in making a specialized, useful report from a data source

1. Selecting Criteria
2. Reorganizing and setting defaults for filters
3. Selecting Columns
4. Reorganizing columns, and choosing which columns will be shown



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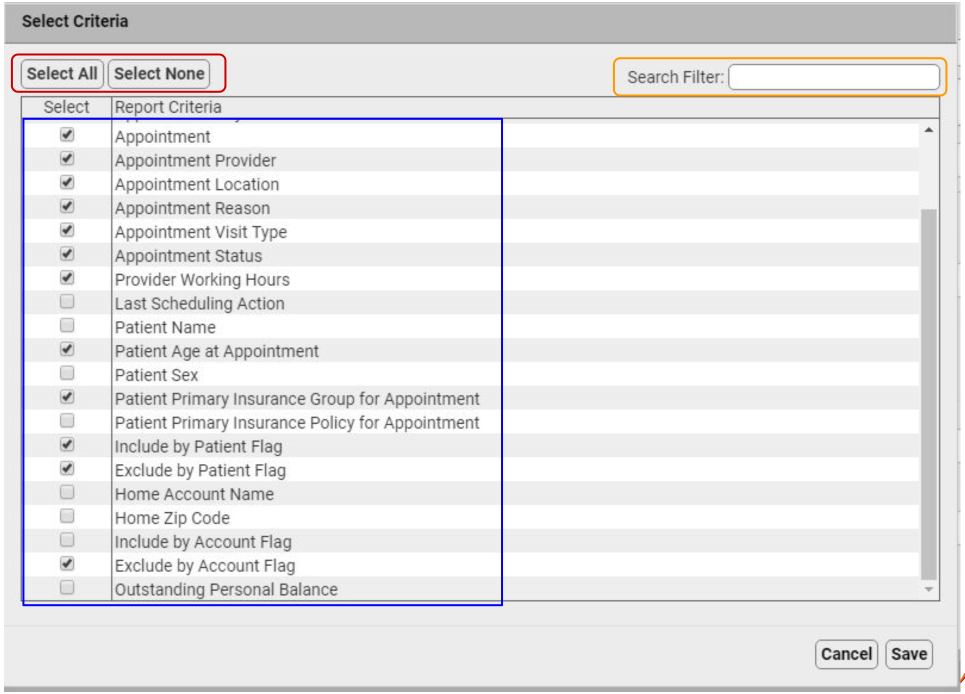
Customizing Reports - Selecting Criteria

- Use this tool to choose which filters will be included in your new report
- Use the Search Filter to find the filter(s) you're looking for
- Use the Select All/None to make sweeping changes



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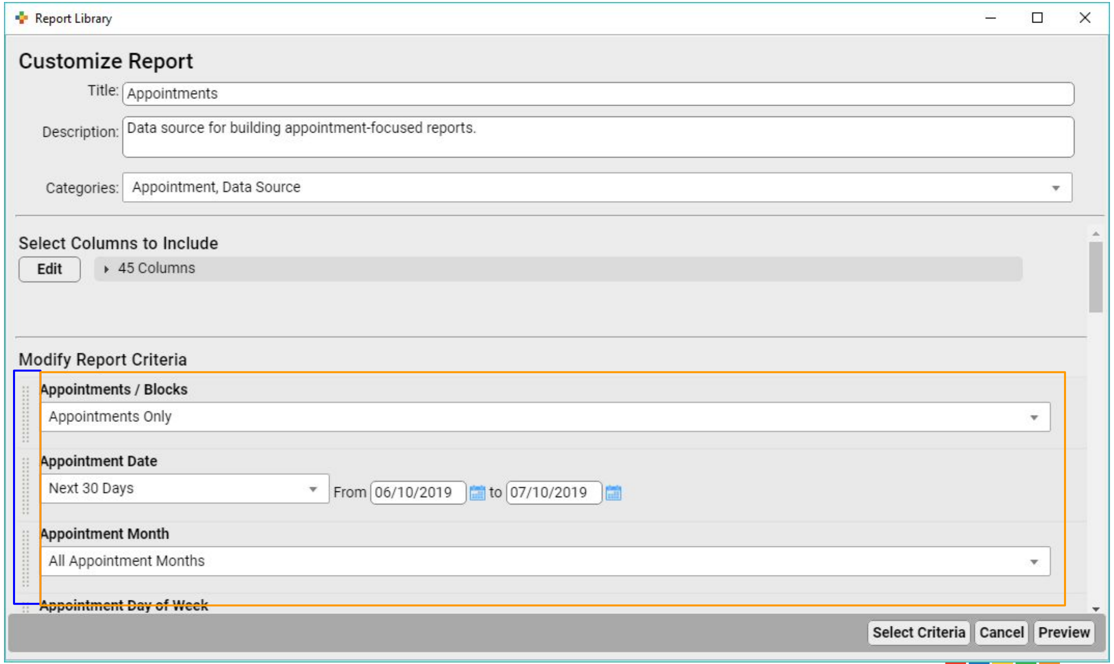
Customizing Reports - Filter Defaults and Order

- With the now smaller list of filters, drag and drop the filters into your preferred order
- For any filters which will usually have the same value, set it now - they will become the new defaults



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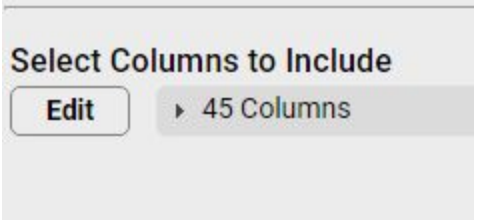
Customizing Reports - Selecting Columns

- Many reports, especially those linked to Data Sources, have many more columns included in the report query than actually needed
    - Or, conversely, there may be columns which are turned off, but may be useful for your new report
- Use the Select Columns tool to make your query “leaner”, and thus faster



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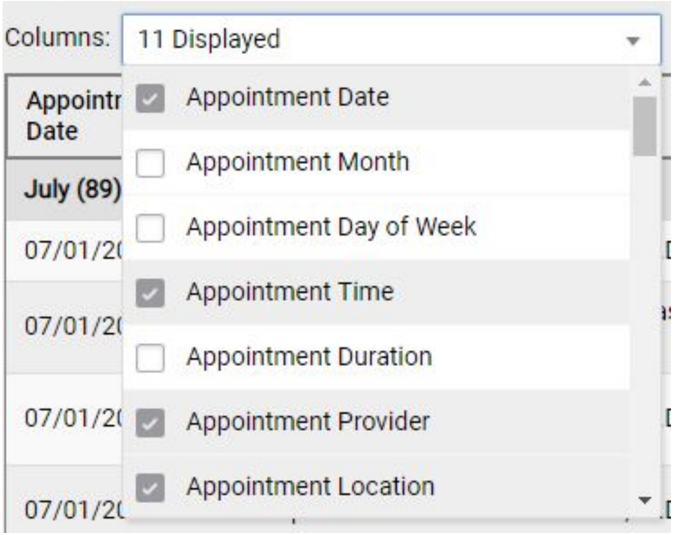
Customizing Reports - Output Controls

Want to see some pieces of data in a report, but only sometimes? You can do that!



Use the 'grouping' feature to better organize your report results, and subtotal any numeric columns which your report includes

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Wrap Up

Take a moment to think about at least one new report you'll build once you return to your office, and/or changes you'll make to your current reports based on what you've learned

Takeaways

What have you learned today?

1. Cool new reports, like the Huddle Sheet, patient recalls, and Payment Reconciliation Report improve workflows which had required Partner functionality
2. Refresher on existing reports and how they can be useful
3. What Data Sources are, and how to use them
4. Customization controls and features