

# Clinical Oversight Reporting

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Project Manager and Product Owner



# Agenda

- Clinical Oversight Reporting  
2:30-3:30
- Oversight Reporting Workshop  
3:45-4:45



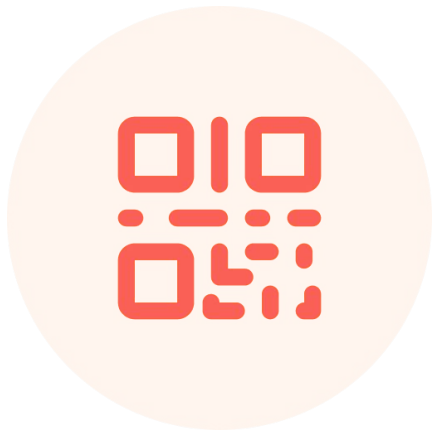
# Session Goals

1. An introduction to various operational and strategic clinical oversight reports within PCC EHR and PCC PM
2. A recognition of the areas of your practice that need the most oversight and ways you can address those areas



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**Which clinical reports are most important to your practice?**



**Join at [slido.com](https://www.slido.com)  
#7696411**



ⓘ Start presenting to display the joining instructions on this slide.



slido



**Which clinical reports are most important to your practice?**



ⓘ Start presenting to display the poll results on this slide.

## Clinical Operations Oversight

Information necessary to oversee routine clinical operations at your practice



- Phone and portal messaging
- Vaccine Inventory
- Orders
- Rx or Lab counts

## Clinical Strategic Oversight

Information necessary to oversee the clinical health of your practice and quality improvement initiatives



- Well visit rates
- Immunization rates
- Screening rates
- Chronic disease mgt. (ADHD, asthma, obesity, etc)

## Population Management

Identifying patients who are in need of care and establishing an ongoing recall and outreach process



- Patient Recall for:
  - Preventive Care
  - Chronic Care
  - Vaccinations



# Clinical Operations Oversight Reporting



# Phone Encounter Response Time

The screenshot shows the PCC EHR interface. The 'Reports' menu is open, and 'Phone Encounter Performance' is selected. Below, the 'Phone Encounter Performance' dialog box is shown, allowing users to select criteria for the report. The dialog includes fields for 'Time between' (12:00am and 11:59pm), 'Dates from' (04/21/13 to 04/26/13), and a list of tasks. The 'Call Back Needed' task is selected. Red arrows point to the time and date fields with the text 'Select time frame and task or tasks'.

Arrival	Time	Last
	9:45am	Farkas
	10:00am	Capone
	11:00am	Sowers

**Select Criteria for Phone Encounter Performance**

Include Phone Encounters with:

Time between 12:00am and 11:59pm

Dates from 04/21/13 to 04/26/13

Tasks: Call Back Needed, Complete Task, Appointment Needed, **Call Back Needed**, Completed Order, Doctor's Attention Needed, Nurse's Attention Needed, Open Task, Phone Message, Prescription Needed, Referral Needed

Buttons: Close, Generate Report

- Track how long it is taking for phone note tasks to be responded to
- Filter by task type to focus on response to just certain tasks (ie, “Doctor’s Attention Needed”, etc)





# Phone Encounter Response Time

**View Phone Encounter Performance**

PCC Pediatric Test Associates  
Generated on 5/09/13 10:57am  
Times between 12:00am and 11:59pm  
Dates from 4/21/13 to 4/26/13  
and Task "Call Back Needed"

Phone Encounters: 6

Call Taken	Task Completed	Response Time	Patient
4/25/13 9:00am	4/25/13 2:17pm	5h 16m	Okamoto, Alexia PCC# 1233
4/25/13 9:15am	4/25/13 9:21am	6m	Arndt, Brian PCC# 1284
4/25/13 9:27am	4/25/13 11:29am	2h 1m	Buchinsky, Catherine PCC# 948
4/25/13 10:44am			Padrone, Shaquana PCC# 132
4/25/13 11:11am	4/25/13 1:33pm	2h 21m	Farkas, Quinn J. PCC# 1803
4/25/13 12:22pm			Lahan, Jordan PCC# 2091

Optional Columns to Display:

- Optionally display user who took phone call, user who completed task, and other information



# Portal Message Response Time

Report Name ▲	Description
Patients Linked to a Portal User	List of patients linked to a portal user.
Portal Activity for Patient	Find portal activity for a specific patient.
Portal Activity for Portal User	Find the portal activity for a specific portal user.
Portal Message Response Time	Time between the receipt of a portal message and the response.
Portal User List	List of portal users including creation date and date of last activity.
Portal Users By Appointment Date	List of appointments and associated patients and portal users.
Portal Users Linked to a Patient	Find all portal users linked to a patient. This report can be used to determine who has records.

- Use this report to track the time between the receipt of the portal message from the patient and the response



# Portal Users For Upcoming Appointments?

## Portal Users By Appointment Date

List of appointments and associated patients and portal users.

**Edit Categories** Patient Portal, Visit

### Appointment Date

Next 7 Days From 07/12/2022 to 07/19/2022

### Location

All

- Track portal activity for patients coming in soon for appointments
- If no portal account, create one when the patient arrives

## Portal Users By Appointment Date

List of appointments and associated patients and portal users.

**Appointment Date:** From 07/12/2022 to 07/19/2022  
**Location:** All

Columns: All 6 Displayed

Group By: None

Search Filter:

Appointment Date/Time	Location	Patient Name	Date of Birth	PCC #	Portal User (Last Activity Date)
07/12/2022 3:00pm	Burlington Peds - New North End	Tozzini V., Daniel Lee	09/26/2006	31	
07/12/2022 3:00pm	Lake Champlain Pediatrics	Gorman Phd., Kelly "Tony" Tyler	10/08/2021	549	
07/12/2022 3:45pm	Lake Champlain Pediatrics	Drescher, Reid	11/28/2020	2749	
07/12/2022 4:00pm	Burlington Peds - New North End	College, Kiley	08/04/2009	3203	
07/13/2022 9:30am	Burlington Peds - New North End	Henkel, Jacob S.	04/10/2004	1161	
07/13/2022 10:00am	Burlington Peds - New North End	Sun JR., Timmy "Bo" Christine	01/11/2021	653	



# # of Portal Users

**Report Library**

## Patients with Portal Users

Find all patients who are linked to Patient Portal users.

**Edit Categories** Patient, Patient Portal

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**Portal Status**

With Portal User

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**Exclude by Patient Flag**

**Edit**

- 6 Patient Flags Excluded
  - Deceased
  - Dismissed
  - Inactive
  - Out Of Town Visitor
  - Transferred
  - Transferred to Adult MD

**Portal Status**

With Portal User

All

With Portal User

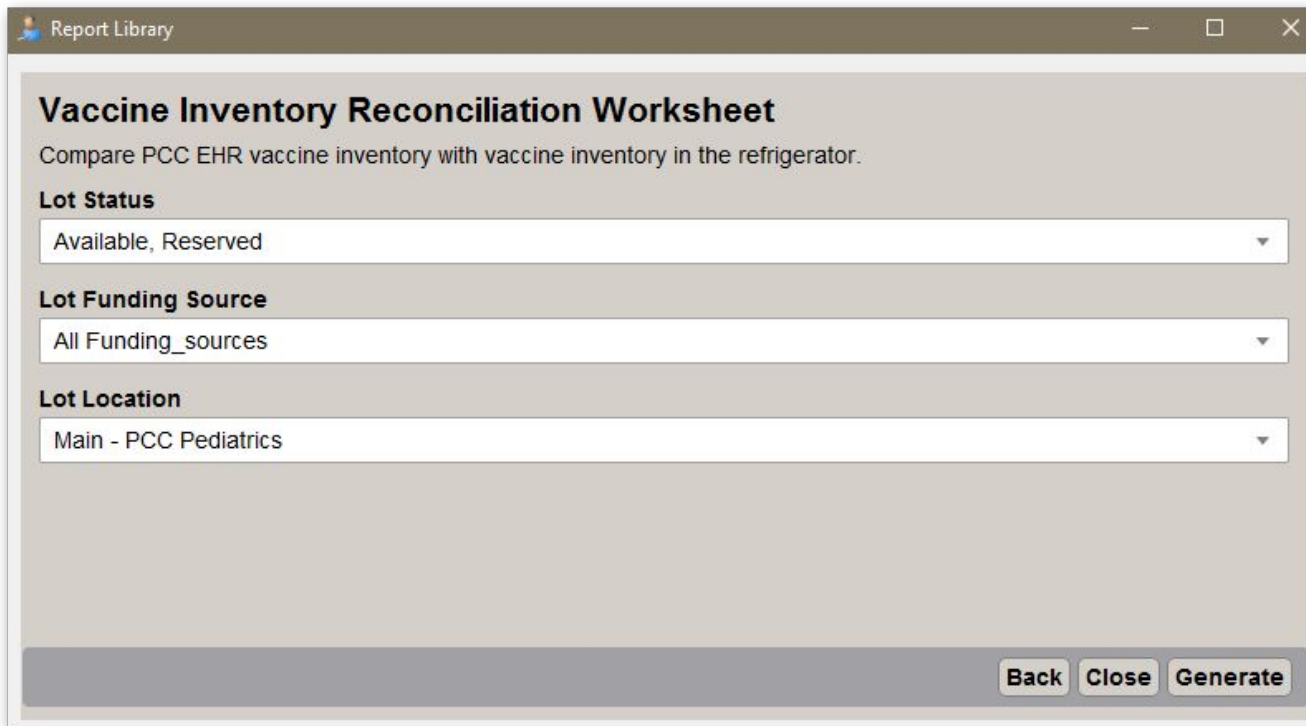
Without Portal User

Out Of Town Vis  
Transferred

- Track how many active patients are with or without a portal user attached
- Filter on patient flag to exclude inactive patients



# Vaccine Inventory Reconciliation



The screenshot shows a web application window titled "Report Library" with a sub-header "Vaccine Inventory Reconciliation Worksheet". Below the sub-header is a descriptive sentence: "Compare PCC EHR vaccine inventory with vaccine inventory in the refrigerator." There are three dropdown menus: "Lot Status" with the value "Available, Reserved", "Lot Funding Source" with the value "All Funding\_sources", and "Lot Location" with the value "Main - PCC Pediatrics". At the bottom right of the window are three buttons: "Back", "Close", and "Generate".

- Use to compare vaccine inventory in PCC EHR to what you actually have in the fridge
- Must be using PCC vaccine inventory features



# Vaccine Inventory Reconciliation

**Vaccine Inventory Reconciliation Worksheet**  
Compare PCC EHR vaccine inventory with vaccine inventory in the refrigerator.

Lot Status: Available, Reserved  
Lot Funding Source: All  
Lot Location: Main

Columns: All 8 Displayed

Search Field: [Empty]

Immunization (CVX)	Lot Number	Lot Status	Lot Funding Source	Lot Location	Expected Inventory	Actual Inventory	Difference
DTaP (20)	C3141AA	Available	Private funds	Main	6		
Hepatitis A (83)	3458dge	Available	Other funds	Main	-2		
Hepatitis B (08)	268646487665	Available	Unspecified funds	Main	-4		
HiB (49)	UB56792	Available	State funds	Main	-1		
HiB (49)	UB56789	Available	State funds	Main	43		

Showing 1 to 19 of 19 entries

Buttons: Back, Export, Close, **Print**

[Documentation on PCC's Vaccine Inventory Management Tools](#)





# Orders by Visit

Report Library

## Orders by Visit

List of appointments that include selected order types.

**Date Range for Appointment Date**  
From 05/29/2017 to 06/28/2017

**Provider**  
Edit All Providers

**Location**  
All Locations

**Order Name**  
Edit 43 Order Names

**Order Status**  
All

Use this to generate a report of encounters with selected order types



# Orders by Visit

Report Library

## Orders by Visit

List of appointments that include selected order types.

**Appointment Date:** from 05/29/2017 to 06/28/2017  
**Provider:** All  
**Location:** All  
**Order Name:** Referral - , 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

Columns: All 11 Displayed Search Filter:

Appointment Date/Time	Order Name	Order Note	Order Status	Open Order Tasks	Provider	Location	Patient Name	Patient PCC#	Patient DOB	Patient
06/21/2017 11:30am	Audiology		Completed		Elizabeth Mary Casey, MD	Main - PCC Pediatrics	Tipton, Mattayha	2292	07/29/2013	F
06/22/2017 10:05am	Allergy/Asthma	Dr Eliza Burnham - 123 Wessex Dr, Colchester VT 05403, 802-888-4545	Ordered	Complete Task 06/22/2017 10:13am	Beverly Crusher, MD	Main - PCC Pediatrics	Quarry, Andrew	934	12/02/2009	M

Can show referrals, screenings, medical procedures, radiology, labs ordered with associated tasks





# Test Results Report

Report Library -> Clinical Reports  
-> Test Results

**Test Results**  
Data source for reporting on discrete test results, including e-lab and manual entry results.

**Edit Categories** Clinical, Data Source

**Order Date**  
Last 365 Days From 01/18/2021 to 01/18/2022

**Test Name**  
Edit 1 Test Name SARS-CoV+SAR

**Test Status**  
All

**Encounter Location**  
All Encounter Locations

**Lab Facility**  
Edit All Lab Facilities

**Test Results**  
Data source for reporting on discrete test results, including e-lab and manual entry results.

**Order Date:** From 01/18/2021 to 01/18/2022  
**Test Name:** SARS-CoV+SARS-CoV-2 (COVID-19) Ag [Presence] in Respiratory specimen by Rapid immunoassay  
**Test Status:** All  
**Encounter Location:** All  
**Lab Facility:** All

Columns: All 16 Displayed Group By: None Search Filter:

Order Date	Test Name	Test LOINC	Test Result	Result Interpretation	Lab Facility Name	Patient Name	Patient Date of Birth	Patient Sex	Patient Race	Patient Ethnicity	Home Account Name	Home Account Address	Home Account Phone 1	Primary Policy Name	Primary Policy Certificate #
01/05/2022	SARS-CoV+SARS-CoV-2 (COVID-19) Ag [Presence] in Respiratory specimen by Rapid immunoassay	95209-3	Negative	Normal	PCC Pediatric Test Associates (Doctor's Office)	Schrum, Julie	04/23/2005	Female			Schrum, Randall	734 N College Street, Saint Johnsbury Center, VT 05863	802-555-0112	Highmark PPO Blue \$15	ZAR10278319700

Can be useful for COVID or other lab test reporting



# Clinical Strategic Oversight Reporting

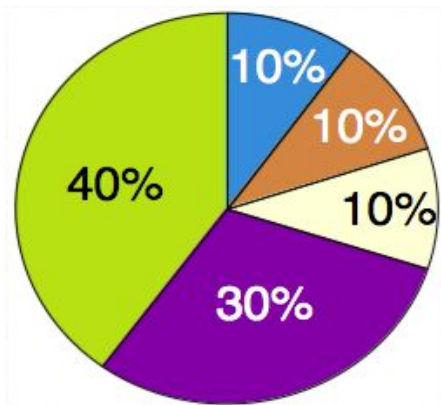


# Clinical Pulse



64

## Weight of Each Clinical Pulse Category



Clinical Pulse Categories	Category Weight	X	Your Category Scores	=	Your Weighted Scores
Well Visit Rates *	40%		71.8		28.72
Immunization Rates *	30%		49.4		14.82
ADD/ADHD Patient Followup	10%		74		7.40
Sick-to-Well Visit Ratio	10%		27		2.70
Diagnoses-per-Visit	10%		100		10.00
<b>Your Clinical Pulse:</b>					<b>64</b>

\* Category includes multiple measures. See below.



# % of Patients Up-to-Date on Well Visits

- Indicator of recall effort and preventive care focus at your practice
- Only “active” patients (seen in past three years) are counted
- Patients with “Inactive” flags (on patient or account record) are omitted
- Low % of patients up-to-date indicates opportunity for more well visits
- Use the EHR Report Library for up-to-date recall lists of overdue patients



# Inactive Flags

PATIENT FLAG INFORMATION

Flag Name: Hospital Only

Short Name: Hospital Only

Priority: 10

Display with patient name? Yes

Display on encounter form? Yes

Prevent scheduling with this flag? No

Exclude these patients from reports? Yes

PATIENT FLAG INFORMATION

Flag Name: COVID Vaccine Only

Short Name: COVID Vaccine Only

Priority: 10

Display with patient name? No

Display on encounter form? No

Prevent scheduling with this flag? No

Exclude these patients from reports? Yes

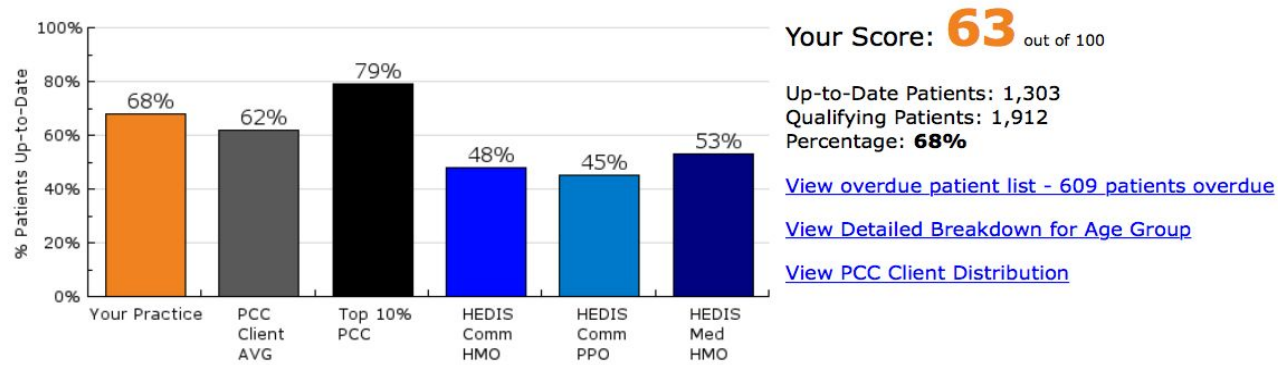
- Review your patient and account flag tables (#12 and #13 in ted.)
- If the last question, “Exclude these patients from reports” is set to “Yes”, then patients with these flags are **excluded** from Dashboard clinical measures



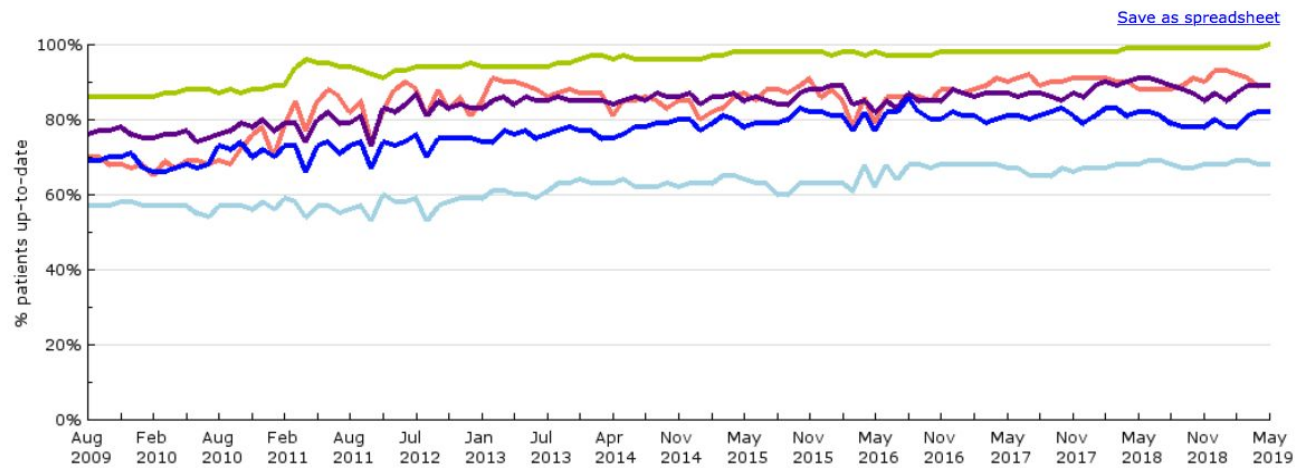
# % of Patients Up-to-Date on Well Visits

## Well Visit Rates - Patients 12-21 Years

This measure shows the percentage of all active patients between the ages of 12 years and 21 years who have received at least one well visit in the past year.



## Your Practice Trends



# “Under 15 Months” Measure Explained

- Based on the standard HEDIS measure and counts active patients having 6 well visits before age 15mo.
- Denominator represents patients who turned 15 months old in the past year (currently 15-27 months old). **Not patients currently under 15 months old**
- If a patient misses the measure, they will continue to show as overdue for this measure until they turn 27 months of age
- Patients whose 1st visit was >6 weeks after birth are excluded as they likely won't have a chance to get 6 well visits before 15mo.





# % of Patients Up-to-Date on Well Visits

## Detailed Breakdown: Primary Insurance

Show Breakdown By: Primary Insurance

Primary Insurance	Active Patients	Overdue Patients	Up-to-Date Patients	% Patients Up-to-Date
All Insurance	5,364	1,870	3,494	65%
Medicaid	92	50	42	46%
Aetna	291	116	175	60%
Blue Cross/Blue Shield	869	307	562	65%
Cigna	186	60	126	68%
GHI-CBP	392	176	216	55%
Oxford	206	84	122	59%

## Detailed Breakdown: Primary Care Provider

Show Breakdown By: Primary Care Provider

Primary Care Provider	Active Patients	Overdue Patients	Up-to-Date Patients	% Patients Up-to-Date
All Providers	5,365	1,870	3,495	65%
Provider 2	2,778	945	1,833	66%
Provider 6	853	373	480	56%
Provider 34	1	0	1	100%
Provider 40	19	11	8	42%
Provider 9	383	94	289	75%

- See breakdown of well visit rates by insurance or primary care provider
- Compare these results with your payor-reported performance





# Immunization Rates

Measure	Qualifying Patients	Up-to-Date Patients	% Up-to-Date	% Change (3 mo.)
<a href="#">Immunization Rates - Adolescents</a>	254	51	20%	Insufficient Data
<a href="#">Immunization Rates - HPV (Patients 13-17 Years)</a>	1,119	651	58%	-2.8% ↓
<a href="#">Immunization Rates - HPV (Patients 13 Years)</a>	254	92	36%	-5.0% ↓
<a href="#">Immunization Rates - Influenza *</a>	4,741	3,093	65%	0.6% ↑
<a href="#">Immunization Rates - Influenza (Asthma) *</a>	451	301	67%	-4.3% ↓
<a href="#">Immunization Rates - Meningococcal</a>	1,119	1,088	97%	0.2% ↑
<a href="#">Immunization Rates - Patients 2 Years Old</a>	317	241	76%	-0.1% ↓
<a href="#">Immunization Rates - Tdap</a>	1,119	1,080	97%	0.7% ↑

- Patients with “Inactive” flags (on patient or guarantor record) are omitted
- Historical and administered immunizations are included in these calculations

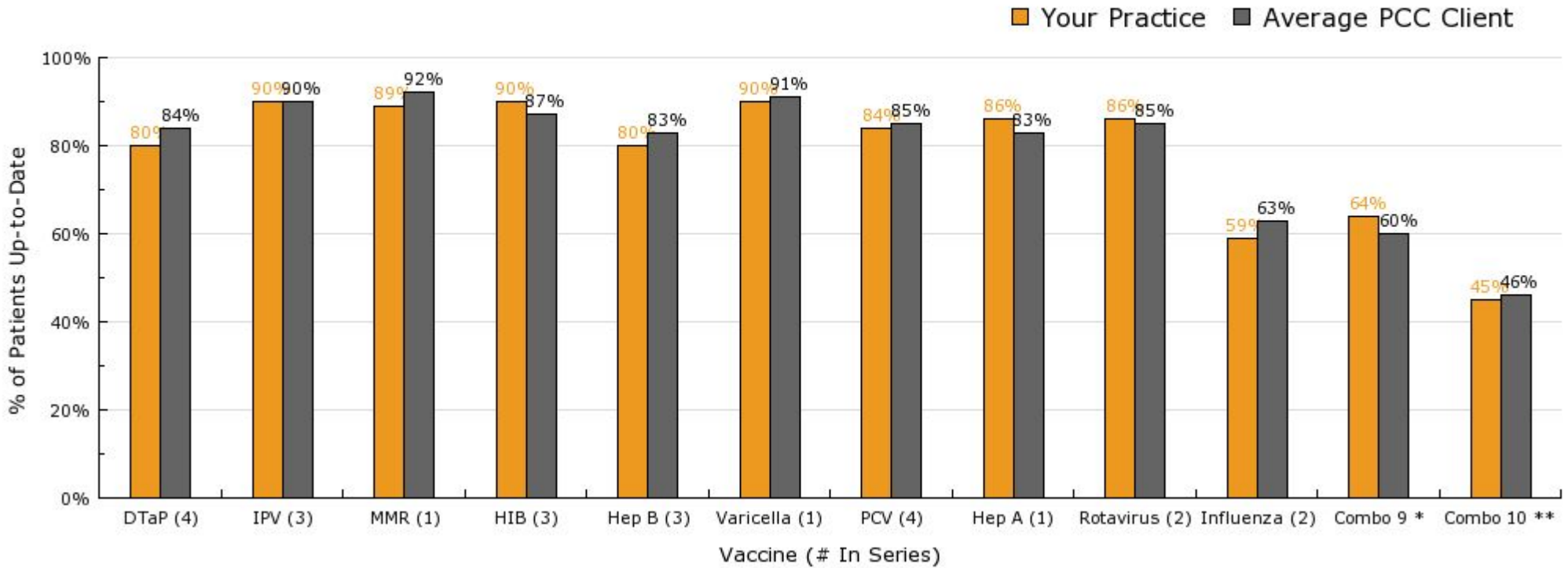


# Childhood Immunization Rates

## Breakdown By Vaccine

Choose Benchmark Comparison:

Average PCC Client



# Adolescent Immunization Rates

## Measure: Immunization Rates - Adolescents

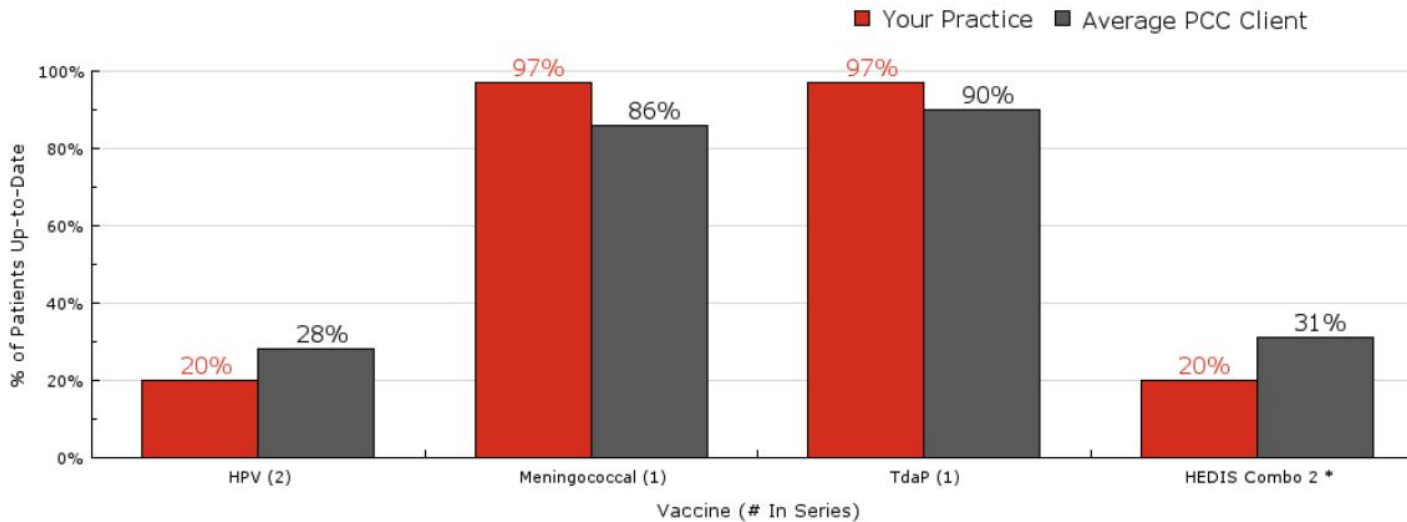
Choose a measure

Dashboard reports updated as of 6/1/2019

The data below represents your immunization rate for each vaccination in the series of vaccines recommended for patients by their thirteenth birthdays. Choose a benchmark comparison from the menu below to compare your practice result with a pediatric benchmark.

### Breakdown By Vaccine

Choose Benchmark Comparison: Average PCC Client



- Includes PCC and HEDIS benchmarks



# COVID-19 Immunization Rates

Age Range:

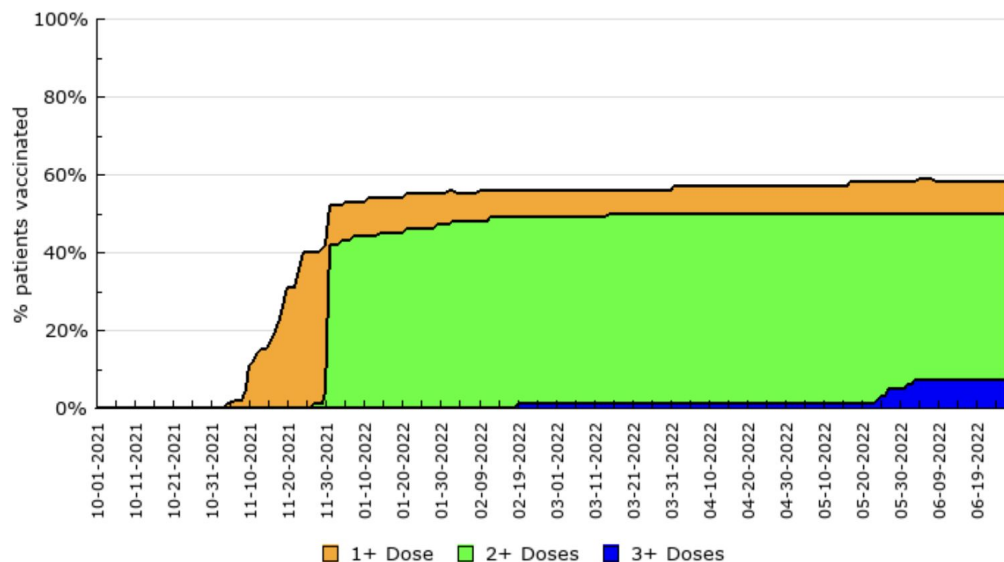


Table represents data as of 6/27/2022

Doses Administered:	# Eligible Patients	# Patients at Dose Level	% of Patients Your Practice	% of Patients PCC Client AVG
0	1114	468	42%	77%
1+	1114	646	58%	23%
2+	1114	553	50%	18%
3+	1114	78	7%	2%

- Includes vaccine trends for 4 age groups:
  - 6mo - 4 Years
  - 5 - 11 Years
  - 12 - 17 Years
  - 18 - 20 Years

- Includes administered and historical vaccine dates

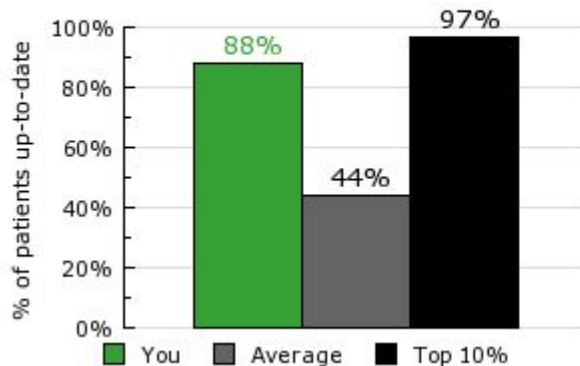
- Includes vaccines for your active patients only



# Depression and Developmental Screening Rates

## How You Compare

[View Comparison By Provider](#)



Your Practice

**88%**

PCC Client Average

**44%**

Top Performers

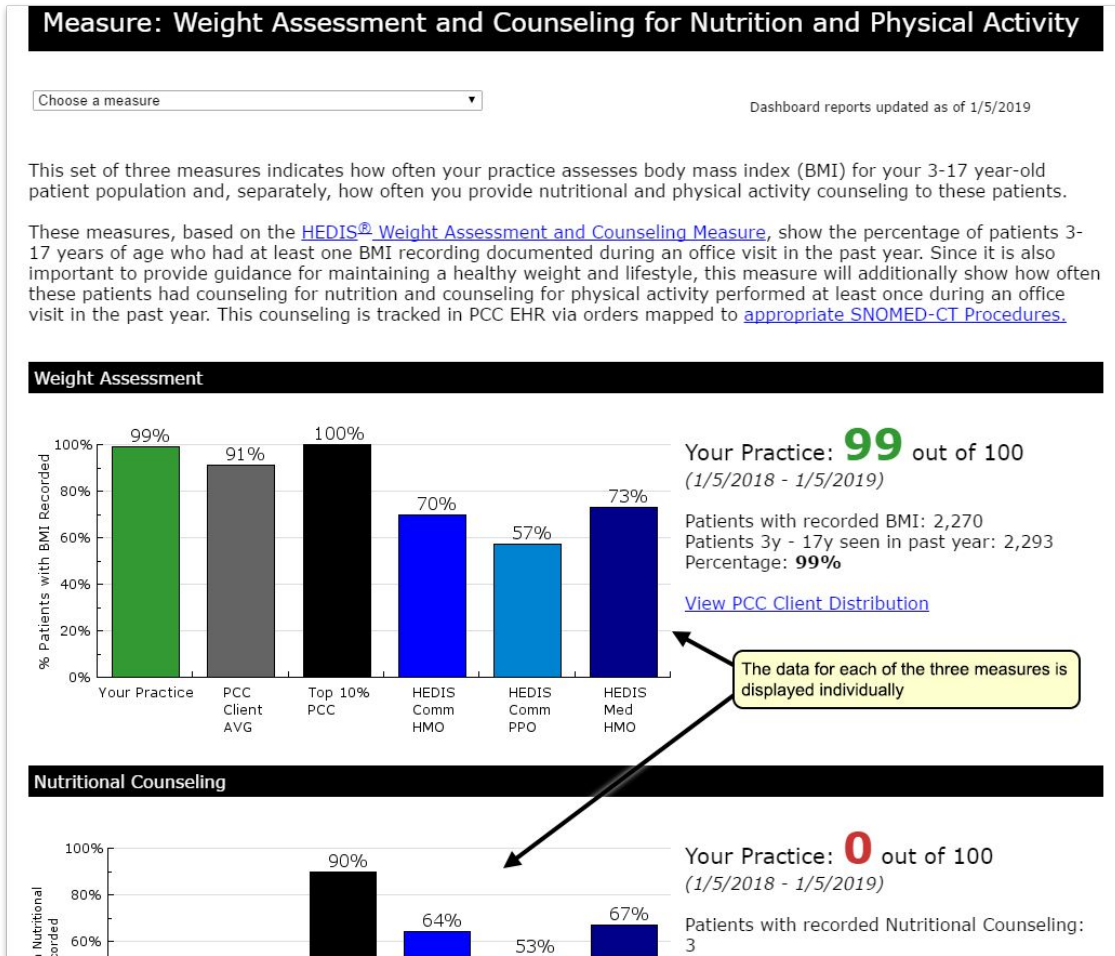
**97%**

(% of adolescents having one well visit and developmental screening in past year)

- Includes measure for active adolescents getting depression screening in past year or infants getting developmental screening between 6-12 months of age
- Based on billing codes (96127, 96110, G0444, or 99420 for adolescents) (96110, G0444, or 96127 for infants)
- Includes breakdown by provider (PCP)



# Weight Assessment and Counseling



- For patients 3-17 years old, measure of how often the following are documented:
  - BMI
  - Nutritional counseling
  - Physical activity counseling
- Includes HEDIS benchmarks





# Location-Specific Clinical Measure Reporting

Your score, graphs, and the metrics on the page update as soon as you filter by location. The new numbers are based on the subset of patients assigned to the location you selected

**Sample Practice Burlington, VT**

Measure: Well Visit Rates

Location:

Choose a measure

Dashboard reports updated as of 1/7/2021

Well visits provide a critical opportunity for preventive services including screening, counseling, and vaccination. The set of measures below, based on the [HEDIS® Child and Adolescent Well-Care Visit measures](#), indicate the percentage of your patients that are up-to-date on their recommended well visit.

**Well Visit Rates - Patients Under 15 Months**

This measure shows the percentage of active patients who have received six or more well visits at your practice by the time they turn 15 months of age. If a patient was added to the practice later than 6 weeks after their birth date, they will be excluded from the measure.

Measure	Percentage
Measure 1	79%
Measure 2	90%
Measure 3	99%
Measure 4	78%
Measure 5	78%

Your Score: **71** out of 100

Up-to-Date Patients: 238



# Population Management





# Patient Recall in the EHR

- [Use the “Preventive Care Recall” report](#) in the EHR Report Library for customized lists of patients who are overdue for well visit
- Create customized recall lists for different age groups with specific output columns
- Use [PCC’s Broadcast Messaging functionality](#) within the EHR Report Library to easily reach out to patients who are overdue
  - No extra cost for PCC’s Broadcast Messaging functionality
- [Schedule recall lists](#) to be generated for you on a regular basis



# Well Visit Recall

- Use EHR Report Library - Patient Recall -> “Preventive Care Recall”
- Restrict on:
  - Visit date (last 3 yrs to include active patients)
  - Exclude by Patient flag (exclude pats w/ any type of inactive flag)
  - Patient age (focus on specific age range)
  - Physical due date (all past dates through next 90 days)
  - Exclude by scheduled appointment (exclude all well visit appointment types over next 365 days)



# Chronic Condition Recall

- Use EHR Report Library - Patient Recall -> “Chronic Condition Recall”
- Restrict on:
  - Visit date (last 3 yrs to include active patients)
  - Exclude by Patient flag (exclude pats w/ any type of inactive flag)
  - Patient age (focus on specific age range)
  - Clinical Diagnosis (include pats w/ specified diagnosis)
  - Exclude by scheduled appointment (exclude all appointment types over next 365 days)
  - Exclude by charges (exclude patients having any charge billed in past X months. If the patient was seen recently, they aren’t overdue)



# Identify Patients Overdue for Vaccines

**Report Library**

Front Desk

Immunization

Search:

Name	Description
Immunization Administration Count	Display the number of vaccines administered during a date range, grouped by lot number, vaccine type, lot location, and funding source.
Immunization Administration Count - Custom	Custom - date range 10/30/16 - 10/31/17, 5 flu immunizaitons, main location
Immunization Administration Details	View vaccine administration details for a given date range, including funding source, VFC eligibility, insurance policies and administering user.
Immunization Administration Details - Custom	Custom - date 10/30/16 - 10/31/17, 5 flu imms, all locations and users
<b>Overdue Vaccine Recall</b>	Find patients who are forecast to be due, or overdue, for specified vaccine families. This report requires immunization forecasting to be enabled.
Patient Immunization Administration Summary	Generate a list of patient vaccine histories for specified vaccines and number of administrations.
Patient Immunization Administration	Custom - removed exclude patient flag - removed age range selection 1 to 6 - auto all imms



# Identify Patients Overdue for Vaccines

## Overdue Vaccine Recall

Find patients who are forecast to be due, or overdue, for specified vaccine families. This report requires immunization forecasting to be enabled.

Last Visit Date: From 09/11/2016 to 09/11/2019

Deceased Status: Not Deceased

Include by Patient Flag: All

Exclude by Patient Flag: None

Include by Account Flag: All

Columns: 4 Displayed

Group By: Vaccine Family

Search:

Patient Name	Dose #	Recommended Date	Past Due Date
<b>Rotavirus (12)</b>			
Bennett, Karis Jean	1	08/10/2019	09/10/2019
Case, Christen	1	08/03/2019	09/03/2019
Cheatham, Josiah J	1	07/22/2019	08/22/2019
Eichelberger, Chelsea J	1	08/09/2019	09/09/2019
Friedrich, Jeffrey	1	07/29/2019	08/29/2019
Gullett III., Jacob "Max" Christopher	1	07/24/2019	08/24/2019
Hoover M.D., Ian "Nate" Hope	1	09/09/2019	10/09/2019
Ludwig, Christophe	1	08/06/2019	09/06/2019
Morrison D.D.S., Adam "Jay" Boy	1	08/05/2019	09/05/2019
Reardon Sr., Shelly "David" NP	1	07/24/2019	08/24/2019
Stanson, Karen	1	07/29/2019	08/29/2019

There may be 12 patients at my practice who are overdue for their Rotavirus vaccine

896 results

# Live Demo

- Well Visit Recall
- Immunization Recall
- Broadcast Messaging
- Scheduling Reports



# Thank You!

- Reach out to PCC support for help with your specific report needs. PCC reporting is very customizable!
- What are the clinical areas of your practice that need more oversight?



# What Questions Do You Have?

Questions posted in the Socio will be read aloud by moderator for the presenter to answer. Please post your questions in Socio now.





# Later Viewing

This and all other UC2022 course recordings will be available for later viewing through Socio and [PCC's YouTube Channel](#)

