

Advanced Clinical Reporting Workshop

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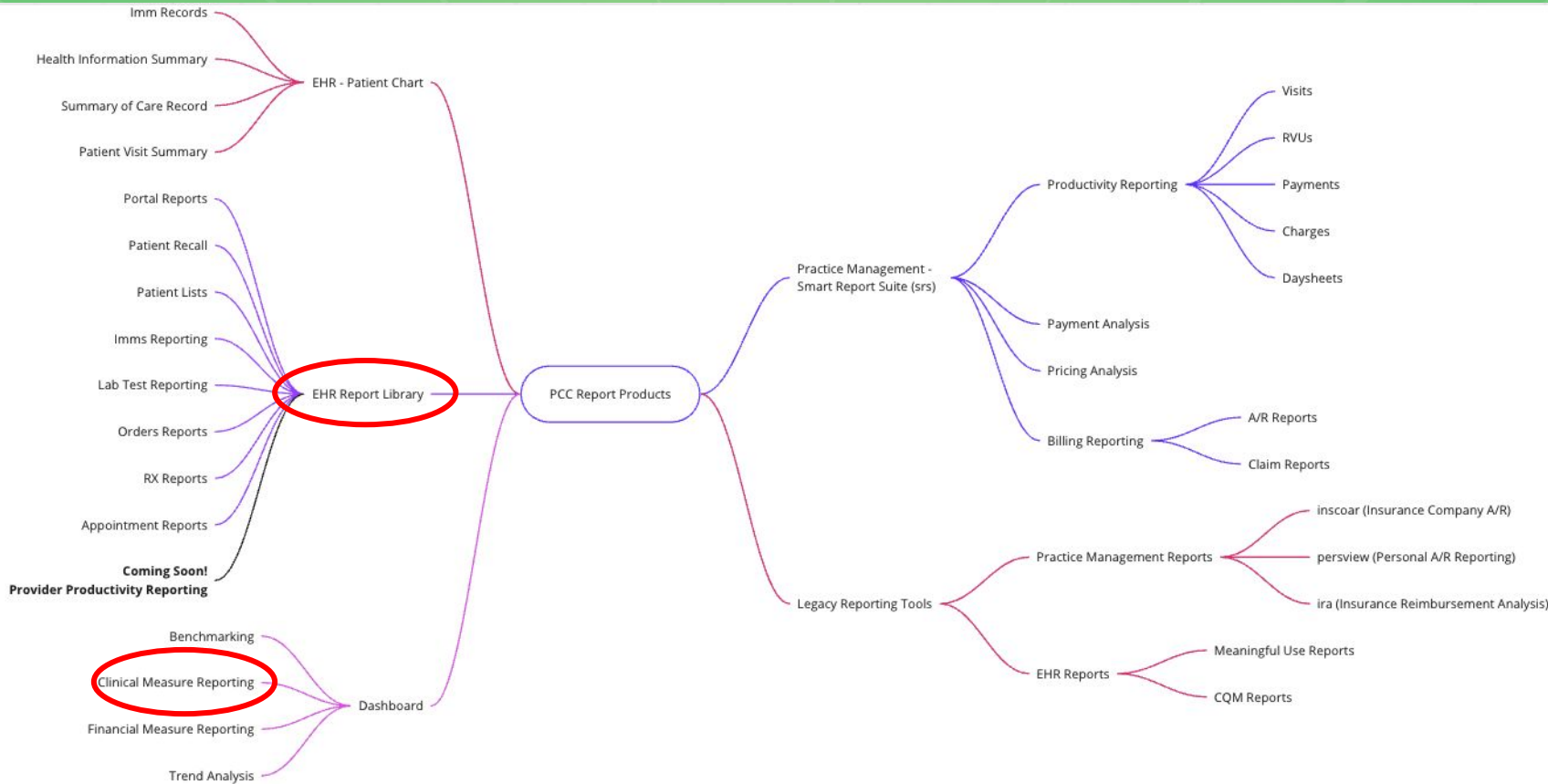
**UC
2024**

Agenda

1. 10:30 - 11:30 - Presentation on EHR reporting tools
2. 11:30 - 12:00 - Clinical Reporting Workshop

Session Goals

1. Understanding of reporting tools within the EHR Report Library and how they can be used to meet your clinical reporting needs
2. Experience using these tools to build and customize reports relevant to your practice



EHR Report Library

- Easy to customize
- Permissions-based to control user access
- Reports can be scheduled to run automatically in the future
- Includes broadcast messaging functionality

Report Library Data Sources

- Patient Lists
- Appointments
- Immunizations
- Orders
- Lab Tests
- Portal
- Prescriptions
- Payments (Front Desk
Payment Reconciliation)

Customize Reports - Select Criteria

Report Library

Customize Report

Title: Prescription Activity

Description: Prescription activity

Categories: Clinical, Data Source, Patient, Prescription, Visit

Select Columns to Include

Edit 9 Columns

Modify Report Criteria

Patient Name
Enter search term

Prescription Creation Date
Last 30 Days From 02/09/2019 to 03/11/2019

Prescription Start Date
All Dates From mm/dd/yyyy to mm/dd/yyyy

Prescription Stop Date
All Dates From mm/dd/yyyy to mm/dd/yyyy

Prescriber

Select Criteria Cancel Preview

Customize Reports - Select Columns

Report Library

Customize Report

Title: Prescription Activity

Description: Prescription activity

Click "Edit" to select columns to include in the report

Categories: Clinical, Data Source, Patient, Prescription, Visit

Select Columns to Include

Edit

▸ 25 Columns

You can click the disclosure triangle to review which columns are already included

Restricting Report Access

Manage Categories

Manage Categories

Category Name	Allowed Roles	# of Reports
Appointment	Locum, Nurse, Nurse Practitioner, PCC Role	6
Billing	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	11
Clinical	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	20
Data Source	Administrative, Clerical, PCC Role	4
Front Desk	Administrative, Clerical, PCC Role	5
Immunization	Locum, Nurse, Nurse Practitioner, PCC Role	11
Patient	Administrative, Clerical, Locum, PCC Role	31
Patient Portal	Administrative, Clerical, Locum, PCC Role	16
Patient Recall	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	5
PCMH	Administrative, Clerical, Locum, Nurse, Nurse Practitioner, PCC Role	25
Prescription	Nurse, Nurse Practitioner, PCC Role	9
Visit	Administrative, Clerical, PCC Role	15

Add **Delete** **Edit** **Close**

Manage Categories

Manage Categories - Edit Category

Category Name: Billing

Allowed Roles

Select All **Select None** Search:

- Administrative
- Clerical
- Locum
- Nurse
- Nurse Practitioner
- PCC Role

Cancel **Save**

Broadcast Messaging

Broadcast Messaging Patient List

Build a list of patients to be sent a broadcast message.

Visit Date: From 03/24/2020 to 03/24/2020

Deceased Status: Not Deceased

Include by Patient Flag: Billing Problem, Burlington Pediatrics, Chronic, CONFIDENTIALITY, Lake Champlain Pediatrics, Medicaid, Special Needs, Winooski P

Exclude by Patient Flag: None

Patient Age: From 0 mos. through 21 yrs. 11 mos.

Columns: 3 Displayed

Group By: None

Search:

Patient Name	PCC #	Patient DoB
Aucoin, Sean	2677	09/04/2000
Baird J.R., Ashlyn "RJ" Hope	574	12/10/2012
Boltz P.C., Richard M	489	03/10/2010
Broaddus, Janice M.	3277	07/18/2011
Ishler M.D, Alex "Ethan" Benjamin	724	06/02/2018
Jetson, Astro	1823	09/06/2015
Keim, Robert	2071	10/09/2004
Leach, Adam	2444	07/03/2000

15 results

Report Library

Back **Export** Close Print

Export

Save as PDF
 Save as CSV
 Send Message to Patients via

Text (SMS) messages are sent to mobile phone numbers from patients' home account and confidential communication preferences.

0/160

Export

Save as PDF
 Save as CSV
 Send Message to Patients via

Email messages are sent to email addresses from the patients' home account, portal users, and confidential communication preferences.

Subject:

Example Report Library Use Cases

- Vaccine Inventory Management
- Portal Administration
- Patient Communication Oversight
- Referral & Care Plan Tracking
- Patient Recall

Vaccine Inventory Management



- Used in tandem with the Vaccine Lot Manager, the Report Library helps you successfully manage your inventory.
- PCC provides 4 main reports for inventory management in the “Immunization” category:
 - Immunization Administration Count
 - Immunization Administration Details
 - Vaccine Inventory Reconciliation Worksheet
 - Vaccine Inventory Transaction Log

Vaccine Inventory Management

1. Run the **Vaccine Inventory Reconciliation Worksheet** daily (or the appropriate period for your practice). Compare quantity on the worksheet to what is in the fridge.
 - a. *Note: Some practices create custom versions for private vs. VFC inventory*

2. If your stock does not match the report:
 - a. Refer to the **Immunization Administration Details** to determine whether a Lot Number was not entered for the vaccine in question.
 - b. Compare administration of Private vs. VFC lots using the **Immunization Administration Counts**.
 - i. If the discrepancy exists there, you can drill down by using the **Immunization Administration Details** to determine the incorrect entry or entries.
 - c. Update patient records & administration details as needed.

Portal Administration

▼ Patient Portal

Search Filter:

Name	Description
Patients with Portal Users	Find all patients who are linked to Patient Portal users.
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 Payments	Portal payments by date range.
Portal User List	List of portal users including creation date and date of last activity.
Portal User's Patient List	List of patients linked to a portal user.
Portal Users By Appointment Date	List of appointments and associated patients and portal users.
Portal Users by Relationship	Find portal users by their relationship to linked patients.
Portal Users Linked to a Patient	Find all portal users linked to a patient. This report can be used to determine who has access to a patient's records and who has accessed those records.

Portal reports provide information on portal accounts and activity that falls into a set of categories:

- Portal user and activity audits
- Portal payment details
- Portal message audits
- Patients who do/don't have portal users

Portal Administration

Portal User and Activity Audits

- Both portal users and their connected patients can be investigated with these reports:
 - **Portal Activity for a Patient:** useful in determining logins and access for a specific patient.
 - **Portal Users Linked to a Patient:** login and access details, but also a list of who is connected to a specific patient.
 - **Portal User List:** A larger audit of who has been created and added to the portal user list during a specific period.

Portal Administration

Patients Who Do/Don't Have Portal Users

- **Patients with Portal Users:** Provides a full list of patients who do and do not have portal users. You can send a broadcast message to these groups to improve sign-ups, announce changes to the portal (like adopting pre-check-in), etc.
- **Portal Users by Appointment Date:** Useful for determining who needs a portal user added ahead of an upcoming appointment (for pre-check-in, as an example)
- **Portal Users by Relationship:** Need to know if you have set up your teenagers appropriately for CHADIS? This report can help.

Patient Communication Oversight

Communication	
Search Filter: <input type="text"/>	
Name	Description
Broadcast Message Details	View detailed results of all attempted messages from a single broadcast message run.
Broadcast Message Log	View message counts per broadcast message run. Message status counts may take a day to become accurate.
Inbound Messages	View replies to email and SMS messages sent by your practice.
Single Text Log	View single patient text messages sent by your practice.

Use the Communication Reports to audit and review your broadcast and single-text messaging. You can also review inbound replies to your SMS and email messages. Although PCC's SMS and Broadcast Messaging systems are intended to be unidirectional, the receiving parties may occasionally reply to a message.

Referral & Care Plan Tracking

- **Care Plans by Date**
 - For practices using PCC's Care Plans, you can filter and view the status of your care plans by creation date and flag. Useful for monitoring which care plans are active, and whether specific follow up may be needed.
- **Orders**
 - Care Plans are not a direct substitute for referral orders in the EHR, and this report will allow you to customize a referrals report that displays open tasks. Useful for tracking outstanding referral orders that are awaiting a report or confirmation from the family that a specialist was seen, for example.

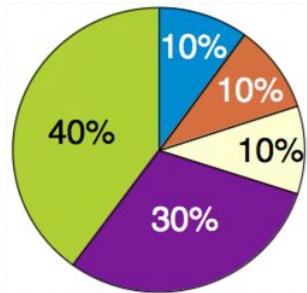
Patient Recall

- PCC provides a number of patient recall tools and reports in its product suite. The Practice Management system's *recaller* program was one of the originals, but you now have access to additional tools like the Report Library and Practice Vitals Dashboard.
- A blend of reports and tools provides the best way to achieve recall inside PCC's system, be it for vaccine, well visit, medication or chronic condition management, etc.

Patient Recall

- The Dashboard provides a great starting point for determining your areas of clinical focus and improvement.
- The Clinical Pulse is provides both a score and a way to drill down into areas of focus, particularly around patient recall.

Weight of Each Clinical Pulse Category



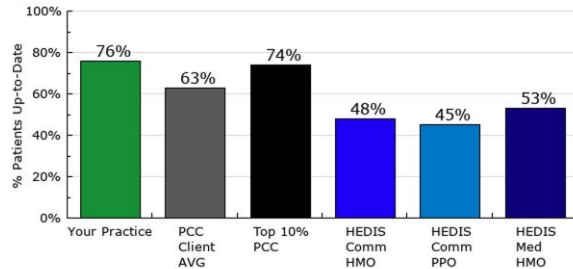
Clinical Pulse Categories	Category Weight	X	Your Category Scores	=	Your Weighted Scores
Well Visit Rates *	40%		92		36.80
Immunization Rates *	30%		95.2		28.56
ADD/ADHD Patient Followup	10%		89		8.90
Sick-to-Well Visit Ratio	10%		66		6.60
Diagnoses-per-Visit	10%		69		6.90
Your Clinical Pulse:					88

* Category includes multiple measures. See below.

Patient Recall

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 Score: **77** out of 100

Up-to-Date Patients: 1,108
Qualifying Patients: 1,450
Percentage: **76%**

[View overdue patient list - 342 patients overdue](#)

[View Detailed Breakdown for Age Group](#)

[View PCC Client Distribution](#)

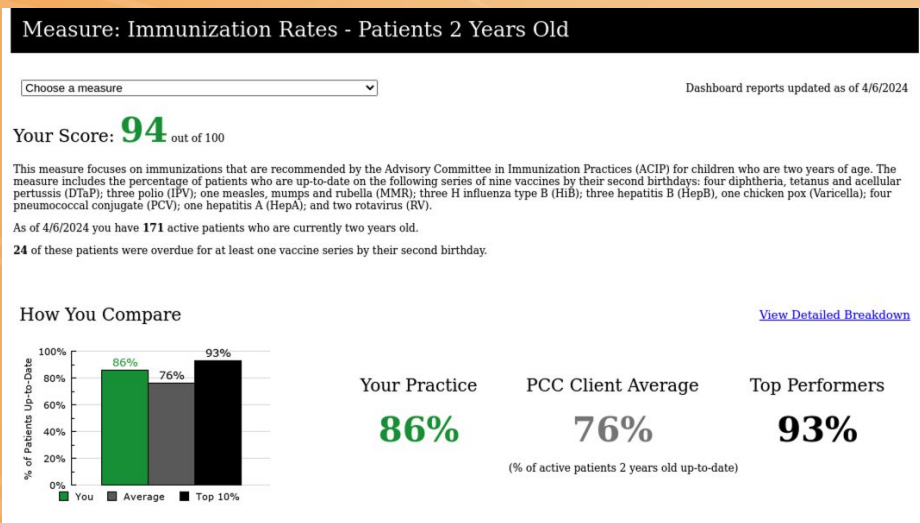
Well Visit Rates

- The Dashboard compares your well visit rates by age category with other PCC practices.
- These individual rate categories offer a overdue patient list.
- These lists are a snapshot in time and not dynamic.
- The Report Library's "Preventive Care Recall" report provides a way to generate this same list, but up-to-date.

Example - Well Visit Recall

- Start with - 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)

Immunization Recall



Immunization Rates

- The Dashboard compares your immunization visit rates by age group and vaccine with other PCC practices.
- These individual rate categories offer a detailed breakdown section with an overdue patient list.
- These lists are a snapshot in time and not dynamic.
- The Report Library's "Overdue Vaccine Recall" report provides a way to generate this same list, but up-to-date.

Example - Identify 11-12 year olds Due for HPV Vaccine

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 immunizations, 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 immms, all locations and users
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.
Patient Immunization Administration Summary	Generate a list of patient vaccine histories for specified vaccines and number of administrations.
Patient Immunization Administration	Custom - remove/exclude patient fees, remove age range selection, 1 to 6 shots, all immms

Example - Identify 11-12 year olds Due for HPV Vaccine

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
Rotavirus (12)			
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

896 results

Note: A callout box points to the 'Rotavirus (12)' header, stating: "There may be 12 patients at my practice who are overdue for their Rotavirus vaccine"

Reporting Workshop

- Experience using srs and Report Library to build and customize reports relevant to your practice
- Refer to exercises or build a report specific to your practice needs

Session Takeaways

1. An understanding of underlying data sources within PCC PM and Report Library
2. Experience and confidence with creating custom reports on your own

References

- Financial Oversight Reporting - Thu 7/17, 10:00-12:00
- Clinical Oversight Reporting - Fri 7/18, 9:50-12:00
- Reports Drop-In - Fri 7/18, 1:15-2:15
- [Creating Custom Reports Using Report Library](#)

What Questions Do You Have?