

# Clinical Oversight Reporting

Tim Proctor - [tim@pcc.com](mailto:tim@pcc.com)  
Product Owner

# 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

## Clinical Operations Oversight

Information necessary to oversee routine clinical operations at your practice



- Phone messaging and portal activity
- Vaccine Inventory
- Patient Communication
- 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)

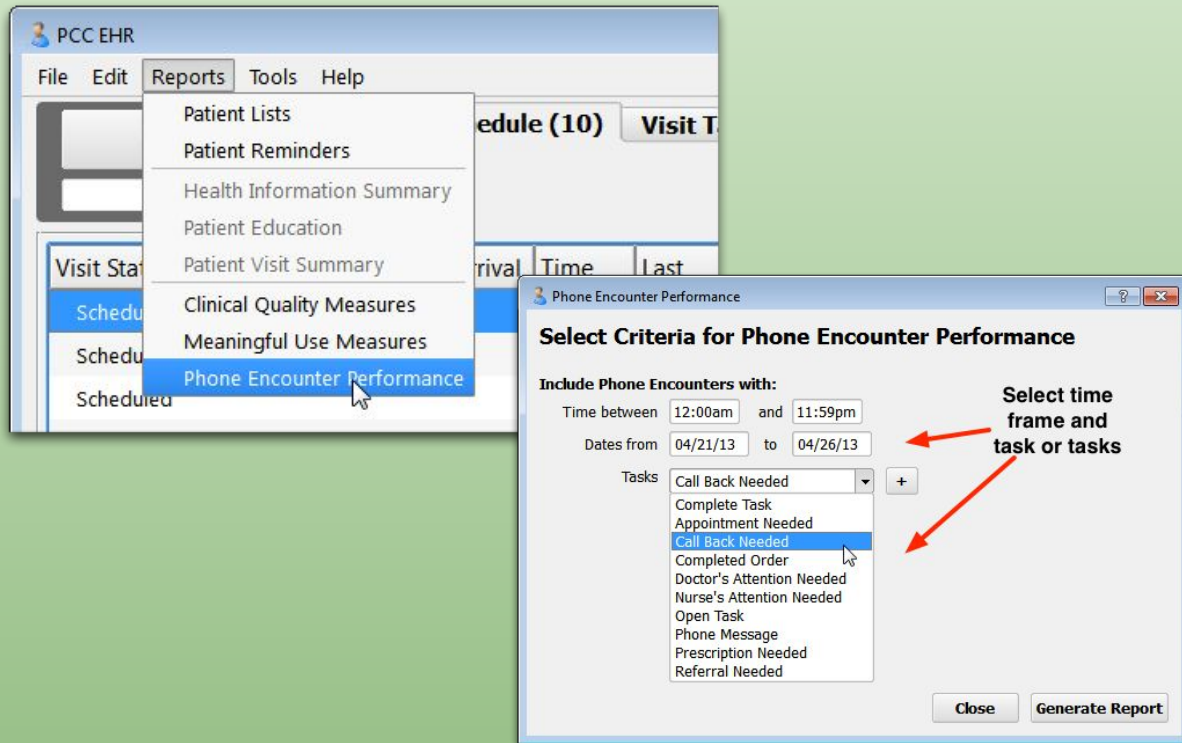
## Population Management

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



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

# Phone Encounter Response Time



- 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

**Phone Encounter Performance**

**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 Library	
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 Administration

Patient Portal	
Search Filter: <input type="text"/>	
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 User and Activity Audits

Report	Purpose
<b>Portal Activity for a Patient</b>	Determine portal logins and access for a specific patient
<b>Portal Users Linked to a Patient</b>	See login and access details, and a list of who is connected to a specific patient
<b>Portal User List</b>	A larger audit of who has been created and added to the portal user list during a specific period



# Portal User and Activity Audits

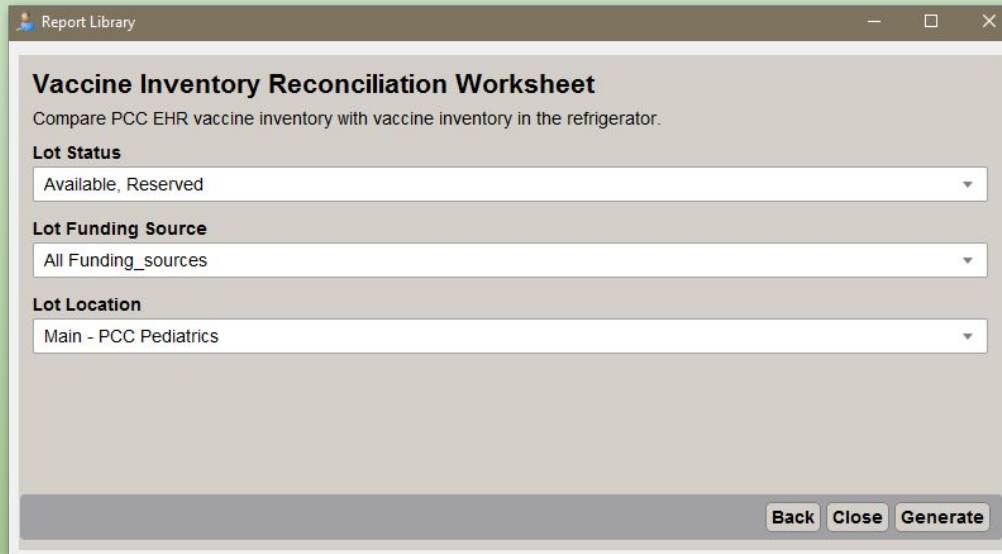
Report	Purpose
<b>Patients with Portal Users</b>	Provides a full list of patients who do and do not have portal users. You can send a broadcast message to these groups to improve sign-ups, announce changes to the portal (like adopting pre-check-in, self-scheduling), etc.
<b>Portal Users by Appointment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

# 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 Reconciliation



The screenshot shows a web application window titled "Report Library". Inside, there is a section titled "Vaccine Inventory Reconciliation Worksheet" with the instruction "Compare PCC EHR vaccine inventory with vaccine inventory in the refrigerator." Below this, there are three dropdown menus: "Lot Status" with the selected value "Available, Reserved", "Lot Funding Source" with the selected value "All Funding\_sources", and "Lot Location" with the selected value "Main - PCC Pediatrics". At the bottom right of the form 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

Report Library

## 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 Filter

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

Previous 1 Next

Show 50 entries

Report Library

Back Export Close **Print**

These fields are left empty

Print this report

# Vaccine Inventory Management

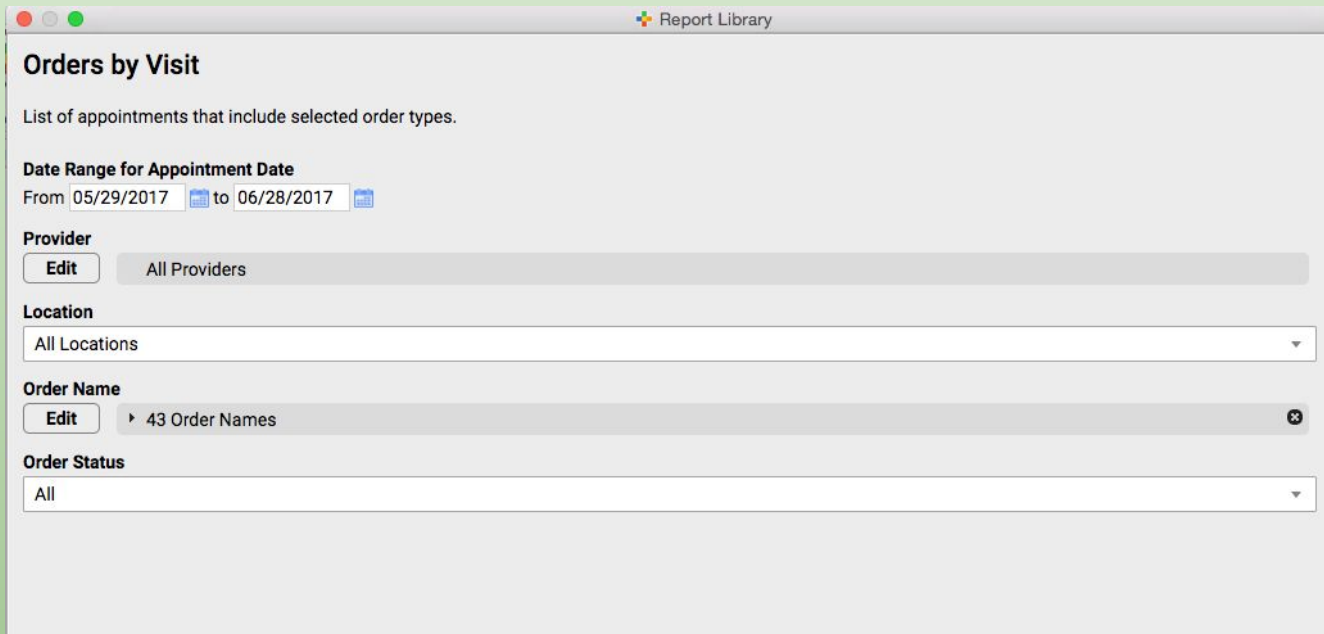
1. If your stock does not match the report:
  - a. Refer to the **Immunization Administration Details** to determine whether a Lot Number was not entered for the vaccine in question.
  - b. Compare administration of Private vs. VFC lots using the **Immunization Administration Counts**.
    - i. If the 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.

# 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.

# Orders by Visit



The screenshot shows a web application window titled "Report Library" with a sub-header "Orders by Visit". Below the header is a descriptive text: "List of appointments that include selected order types." The configuration section includes several filters: a "Date Range for Appointment Date" with a date range from "05/29/2017" to "06/28/2017"; a "Provider" filter with an "Edit" button and a selection of "All Providers"; a "Location" filter with a dropdown menu currently set to "All Locations"; an "Order Name" filter with an "Edit" button and a selection of "43 Order Names"; and an "Order Status" filter with a dropdown menu currently set to "All".

**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.										
<b>Appointment Date:</b> from 05/29/2017 to 06/28/2017 <b>Provider:</b> All <b>Location:</b> All <b>Order Name:</b> 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+SARS-CoV-2

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)	Schrump, Julie	04/23/2005	Female			Schrump, 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

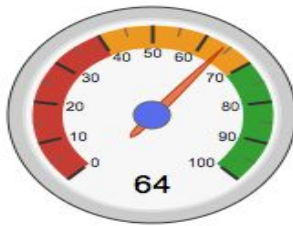
# Bright Futures Periodicity Schedule

<https://www.aap.org/periodicityschedule>

Are you missing any recommended preventive care opportunities?

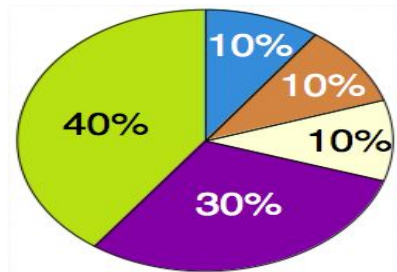
AGE <sup>1</sup>	Prenatal <sup>2</sup>	Newborn <sup>3</sup>	3-5 d <sup>4</sup>	By 1 mo	2 mo	4 mo	6 mo	9 mo	12 mo	15 mo	18 mo	24 mo	30 mo	3 y	4 y	5 y	6 y	7 y	8 y	9 y	10 y	11 y	12 y	13 y	14 y	15 y	16 y	17 y	18 y	19 y	20 y	21 y
<b>HISTORY</b>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Initial/Introsol	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
<b>MEASUREMENTS</b>																																
Length/Height and Weight	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Head Circumference	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Weight for Length	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Body Mass Index <sup>5</sup>																																
Blood Pressure <sup>6</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
<b>SENSORY SCREENING</b>																																
Vision <sup>7</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Hearing <sup>8</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
<b>DEVELOPMENTAL/SOCIAL/BEHAVIORAL/MENTAL HEALTH</b>																																
Maternal Depression Screening <sup>9</sup>				●	●	●	●																									
Developmental Screening <sup>10</sup>								●																								
Autism Spectrum Disorder Screening <sup>11</sup>												●	●																			
Developmental Surveillance	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Behavioral/Social/Emotional Screening <sup>12</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Tobacco, Alcohol, or Drug Use Assessment <sup>13</sup>																						●	●	●	●	●	●	●	●	●	●	●
Depression and Suicide Risk Screening <sup>14</sup>																						●	●	●	●	●	●	●	●	●	●	●
<b>PHYSICAL EXAMINATION<sup>15</sup></b>		●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
<b>PROCEDURES<sup>16</sup></b>																																
Newborn Blood	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Newborn Bilirubin <sup>17</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Critical Congenital Heart Defect <sup>18</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Immunization <sup>19</sup>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●
Anemia <sup>20</sup>																																
Lead <sup>21</sup>																																
Tuberculosis <sup>22</sup>				●																												
Dyslipidemia <sup>23</sup>																																
Sexually Transmitted Infections <sup>24</sup>																																
HPV <sup>25</sup>																																
Hepatitis B Virus Infection <sup>26</sup>		●																														
Hepatitis C Virus Infection <sup>27</sup>																																
Sudden Cardiac Arrest/Death <sup>28</sup>																																
Cervical Dysplasia <sup>29</sup>																																
<b>ORAL HEALTH<sup>30</sup></b>																																
Fluoride Varnish <sup>31</sup>																																
Fluoride Supplementation <sup>32</sup>																																
<b>ANTICIPATORY GUIDANCE</b>	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●

# 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
Your Clinical Pulse:					64

\* Category includes multiple measures. See below.

# 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

# PCMH Dashboard

## QI 01 (Core) – Clinical Quality Measurement

To understand current performance and to identify opportunities for improvement, the practice monitors clinical quality measurement. When it selects measures of performance, the practice indicates the following for each measure: period of measurement, number of patients represented by the date, and rate (percent) based on a numerator and denominator.

Choose at least five clinical quality measures across the four categories (A-D) listed below. You must monitor at least one measure of each category, and you cannot use the same measure for different categories.

Reporting period includes active patients as of 6/1/2019

### A. Immunization Measures

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%	-1.1% ↓
<a href="#">Immunization Rates - Influenza *</a>	4,741	3,093	65%	-0.4% ↓
<a href="#">Immunization Rates - Influenza (Asthma) *</a>	451	301	67%	-0.4% ↓
<a href="#">Immunization Rates - Meningococcal</a>	1,119	1,088	97%	-0.1% ↓
<a href="#">Immunization Rates - Patients 2 Years Old</a>	317	241	76%	-0.1% ↓
<a href="#">Immunization Rates - Tdap</a>	1,119	1,080	96%	-0.1% ↓

\* Influenza rates are seasonal. This measure represents patients vaccinated since July 1. The p

## QI 05 (1 Credit) Health Disparities Assessment

The practice assesses health disparities using performance data stratified for vulnerable populations. You must choose one clinical quality and one patient experience measure. Use the menus below to stratify one clinical quality measure for a selected vulnerable population.

Reporting period includes active patients as of 6/1/2019

Performance data stratified for vulnerable populations

Measure:

Breakdown By:

ADD/ADHD Patient Followup			
Ethnicity	Qualifying Patients	Up-to-Date Patients	% Up-to-Date
None Selected	12	8	67%
Hispanic or Latino	25	18	72%
Not Hispanic or Latino	243	164	67%
Prefers not to answer	13	10	77%

## QI 10 (Core) Setting goals and taking action to improve appointment availability

Practices may select no-show rates as an area of focus for improving patient access. You may also want to consider monitoring no-show rates as a health care costs measure (resource stewardship measure) relevant to PCMH element Q102-B.

The reporting period for this measure includes appointments from 3/1/2019 to 5/31/2019

Measure	Total Appointments	Missed Appointments	% Missed	% Change (3 mo.)
<a href="#">Missed Appointment Rate</a>	5,272	112	2.1%	0.0% ↑

## QI 15 (Core) Reporting Performance within the Practice

The practice provides individual clinician or practice-level reports to clinicians and practice staff. Performance results reflect care provided to all patients in the practice (relevant to the measure), not only to patients covered by a specific payer. Select a measure from the menu below to see clinician-level reporting, broken down by primary care provider:

Reporting period includes active patients as of 6/1/2019

Performance data stratified for individual clinicians

Measure:

ADD/ADHD Patient Followup			
Primary Care Provider	Qualifying Patients	Up-to-Date Patients	% Up-to-Date

- Summary of current immunization, preventive care, chronic/acute care, and behavioral health measures
- Indication of recent trends (past 3 mos)
- Measure breakdown by PCP and other categories

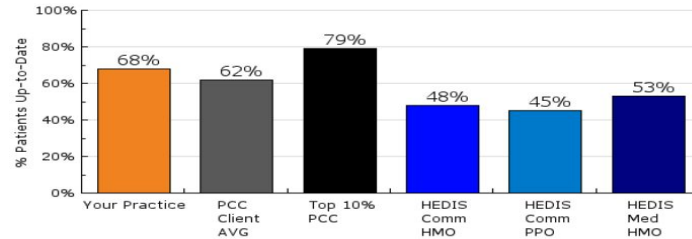
# % of Patients Up-to-Date on Well Visits

- 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

# % 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 Score: **63** out of 100

Up-to-Date Patients: 1,303

Qualifying Patients: 1,912

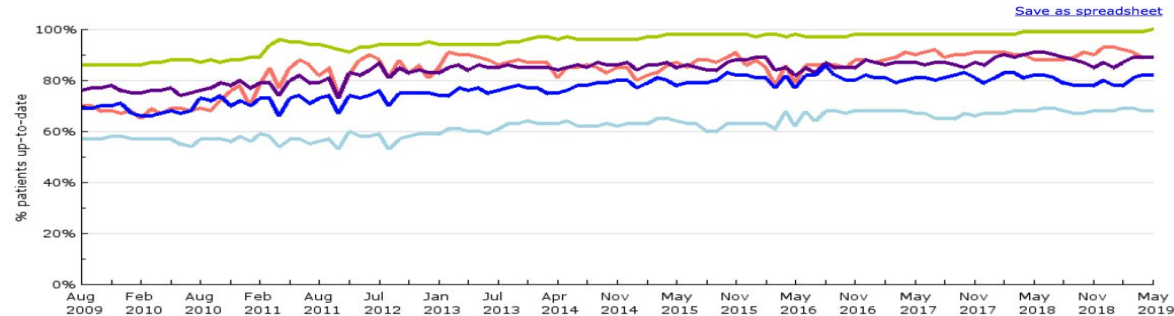
Percentage: **68%**

[View overdue patient list - 609 patients overdue](#)

[View Detailed Breakdown for Age Group](#)

[View PCC Client Distribution](#)

## 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 (so...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

# Clinical Oversight Leads to Revenue Opportunity

- Does your practice have a recall process?
- How many of your active patients are overdue for a well visit?
- How can you fit these patients into your schedule?

Patient Age	# Patients Overdue for a well visit	AVG \$ Deposited per well visit *	Annual Revenue Opportunity
3 - 6 Years	200	\$243	\$49,000
7 - 11 Years	300	\$221	\$66,000
12 - 18 Years	400	\$276	\$110,000

\* Benchmarks based on national PCC client data

# 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% ↑

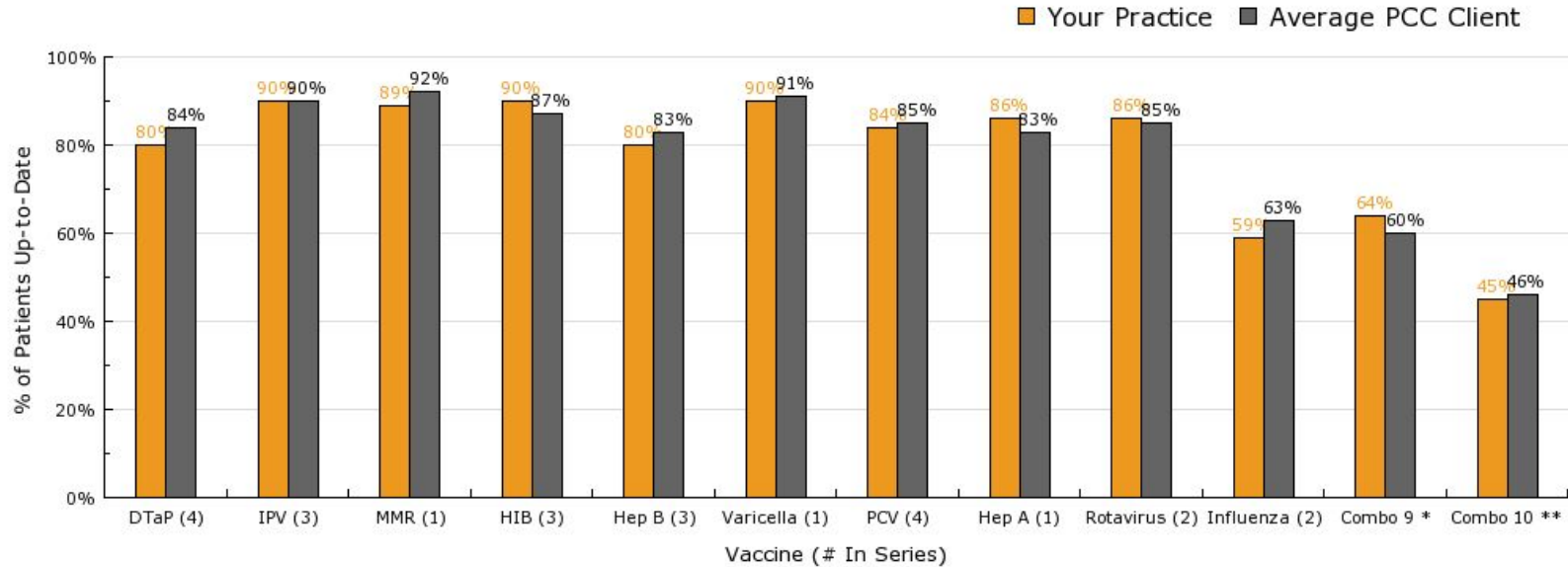
- Patients with “Inactive” flags (on patient or guarantor record) are omitted
- Historical and administered immunizations are included in these calculations

# Childhood Immunization Rates

## Breakdown By Vaccine

Choose Benchmark Comparison:

Average PCC Client



# Adolescent Immunization Rates

## Measure: Immunization Rates - Adolescents

Choose a measure

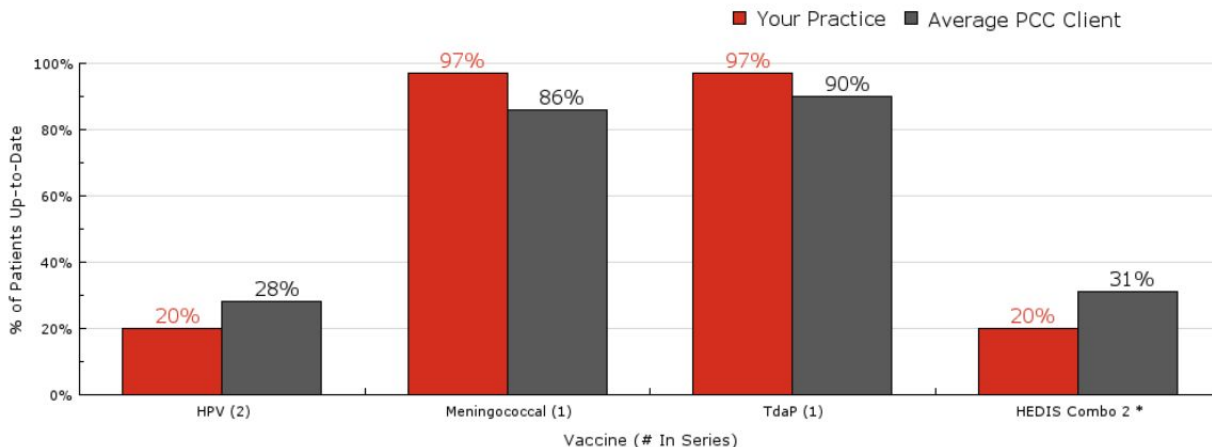
Dashboard reports updated as of 6/1/2019

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

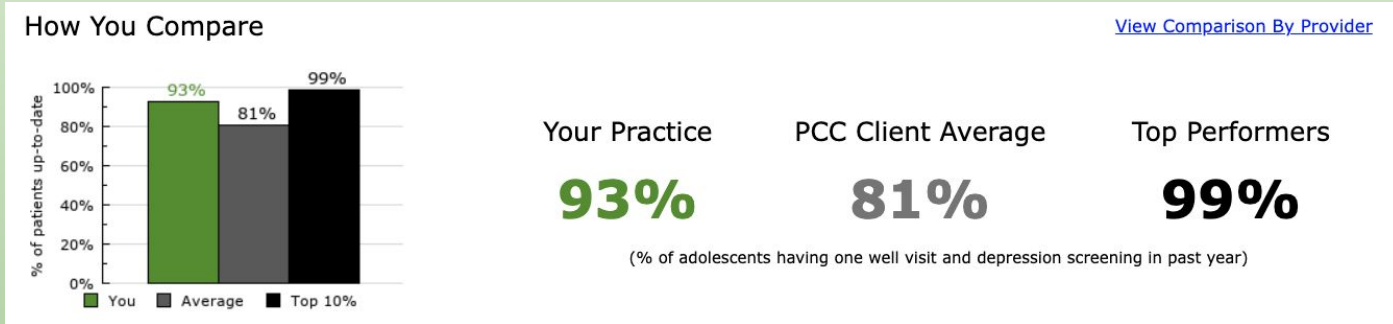
# Adolescent Depression Screening

	ADOLESCENCE										
AGE <sup>1</sup>	11 y	12 y	13 y	14 y	15 y	16 y	17 y	18 y	19 y	20 y	21 y
<b>HISTORY</b>											
Initial/Interval	●	●	●	●	●	●	●	●	●	●	●
<b>MEASUREMENTS</b>											
Length/Height and Weight	●	●	●	●	●	●	●	●	●	●	●
Head Circumference											
Weight for Length											
Body Mass Index <sup>3</sup>	●	●	●	●	●	●	●	●	●	●	●
Blood Pressure <sup>6</sup>	●	●	●	●	●	●	●	●	●	●	●
<b>SENSORY SCREENING</b>											
Vision <sup>7</sup>	★	●	★	★	●	★	★	★	★	★	★
Hearing											
<b>DEVELOPMENTAL/SOCIAL/BEHAVIORAL/MENTAL HEALTH</b>											
Maternal Depression Screening <sup>11</sup>											
Developmental Screening <sup>12</sup>											
Autism Spectrum Disorder Screening <sup>13</sup>											
Developmental Surveillance	●	●	●	●	●	●	●	●	●	●	●
Behavioral/Social/Emotional Screening <sup>14</sup>	●	●	●	●	●	●	●	●	●	●	●
Tobacco, Alcohol, or Drug Use Assessment <sup>15</sup>	★	★	★	★	★	★	★	★	★	★	★
Depression and Suicide Risk Screening <sup>16</sup>		●	●	●	●	●	●	●	●	●	●

AVG Payment for this screening = \$6

**CPT Code - 96127**

# Depression Screening Rates



- Percentage of active adolescents getting depression screening in past year
- Based on billing codes (96127, 96110, G0444, or 99420 for adolescents)
- Includes breakdown by provider (PCP)



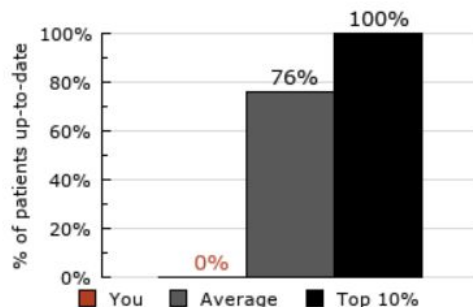
# Infant Developmental Screening

	INFANCY							
AGE <sup>1</sup>	Prenatal <sup>2</sup>	Newborn <sup>3</sup>	3-5 d <sup>4</sup>	By 1 mo	2 mo	4 mo	6 mo	9 mo
<b>HISTORY</b>								
Initial/Interval	●	●	●	●	●	●	●	●
<b>MEASUREMENTS</b>								
Length/Height and Weight		●	●	●	●	●	●	●
Head Circumference		●	●	●	●	●	●	●
Weight for Length		●	●	●	●	●	●	●
Body Mass Index <sup>5</sup>								
Blood Pressure <sup>6</sup>		★	★	★	★	★	★	★
<b>SENSORY SCREENING</b>								
Vision <sup>7</sup>		★	★	★	★	★	★	★
Hearing		● <sup>8</sup>	● <sup>9</sup>	→		★	★	★
<b>DEVELOPMENTAL/SOCIAL/BEHAVIORAL/MENTAL HEALTH</b>								
Maternal Depression Screening <sup>11</sup>				●	●	●	●	
→ Developmental Screening <sup>12</sup>								●

# Infant Developmental Screening Rates

How You Compare

[View Comparison By Provider](#)



Your Practice

**0%**

PCC Client Average

**76%**

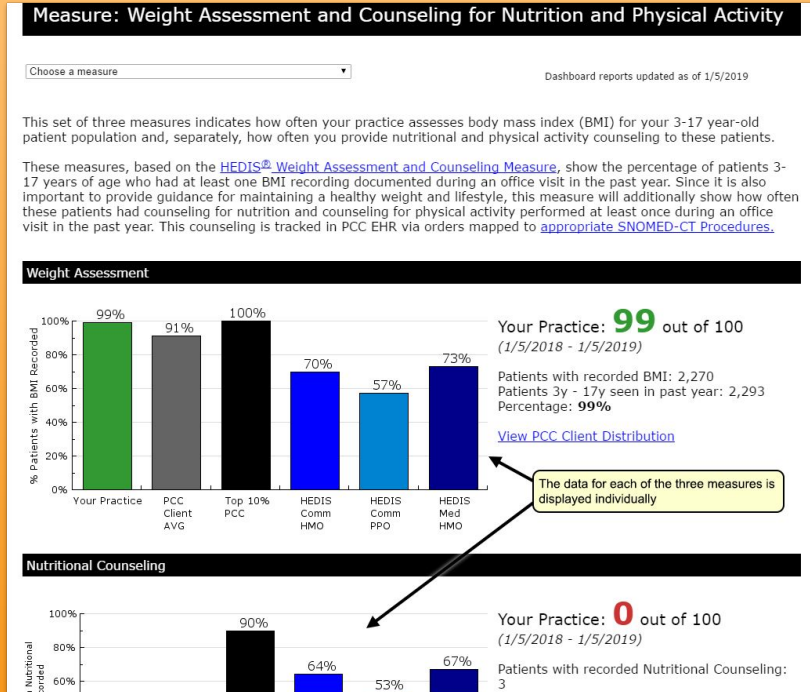
Top Performers

**100%**

(% of patients having one developmental screening between 6 - 12 months of age)

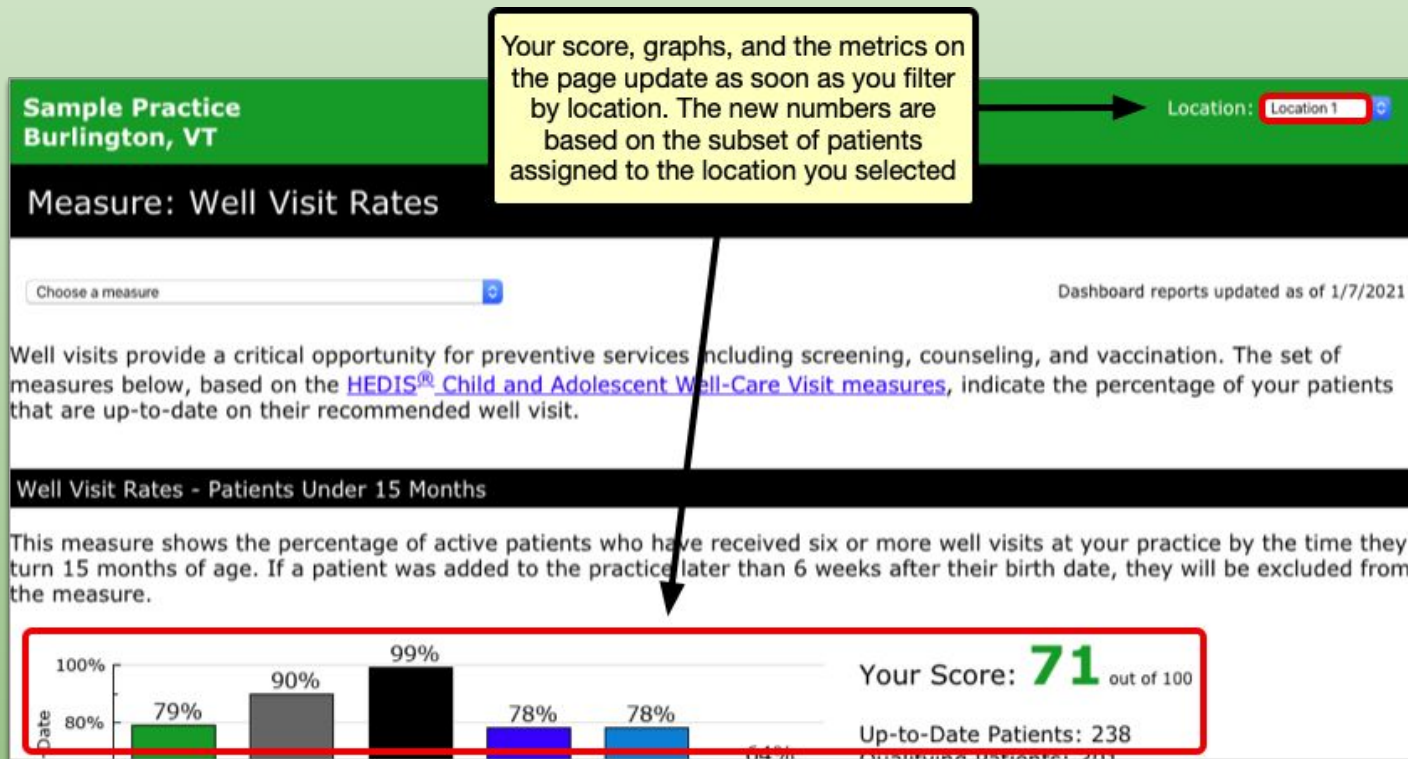
- Measure of infants getting developmental screening between 6-12 months of age
- Based on billing codes (96110, G0444, or 96127 for infants)
- Includes breakdown by provider (PCP)

# 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



# Standardized Measures

Coming soon to Report Library

Measure	Description
<b>Screening for Depression and Follow-up Plan</b>	Percentage of patients 12-17 yrs old seen in reporting period that are screened for depression and have a follow-up plan for positive screening
<b>Childhood Immunization Status</b>	Percentage of patients turning 2 in reporting period who are up-to-date on recommended vaccines
<b>Weight Assessment and Counseling for Nutrition and Physical Activity</b>	Percentage of patients 3-17 yrs old seen in reporting period having height and weight assessed and counseling for nutrition and exercise provided
<b>Documentation of Current Medications in Medical Record</b>	Percentage of visits where a list of current medications are documented

# Population Management

# Care Plan Management

Care Plans by Date

Find care plans by creation date and status.

Care Plan Creation Date: From 01/01/2024 to 07/01/2024

Primary Care Provider: All

Care Plan Status: All

Include by Patient Flag: All

Exclude by Patient Flag: None

Columns: 12 Displayed

Group By: None

Search Filter:

Care Plan Creation Date	Care Plan Goal	Care Plan Actions	Care Plan Next Steps	Care Plan Coordination Notes	Care Plan Team Members	Care Plan Last Reviewed	Care Plan Status	Patient PCC #	Patient Sex	Patient DOB	Primary Care Provider
06/13/2024	Lose weight	Attending slimming club					Active	3260	M	06/18/2008	None
06/13/2024	Vision Problems/Dizziness	Vision therapy	referral to ophthalmologist	saw ophthalmologist, new glasses were the wrong strength, issue resolved	Dr. Harriet T Spiegel		Resolved	4020	F	01/21/2007	
06/13/2024	Headaches	Aromatherapy	Regular aromatherapy sessions and acupuncture		Dr. Jackie Chan		Inactive	4020	F	01/21/2007	
06/13/2024	Anger Management	Anger management therapy	Referral	needs referral to anger management therapist	Mary Q Hartshon		Active	4020	F	01/21/2007	
06/13/2024	Reduce Use of Inhaler	Breathing control				06/13/2024	Active	2545	F	12/29/2014	None
06/13/2024	Weight Management	Attending slimming club				06/13/2024	Active	2545	F	12/29/2014	None
06/13/2024	Increase Exercise	Exercise class	Patient is very social. Consider an organized exercise class with friends to				Active	1166	M	11/28/2014	None

34 results

Report Library

BackScheduleExportClosePrint

- Use RL Clinical Reports -> "Care Plans by Date" report to monitor patients with a care plan
- Is it time for a follow-up visit to check in on a patient's care plan?

# 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	
Data Source	
▸ Front Desk	
▾ Immunization	
Search: <input type="text"/>	
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
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 - removed exclude deatient flag removed age range selection 1 to 6 shots 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:

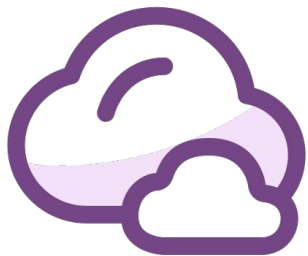
Patient Name	Dose #	Recommended Date	Past Due Date
Rotavirus (12)			
Bennett, Karis Jean	1	08/10/2019	09/10/2019
Case, Christen	1	08/03/2019	09/03/2019
Cheatham, Josiah J	1	07/22/2019	08/22/2019
Eichelberger, Chelsea J	1	08/09/2019	09/09/2019
Friedrich, Jeffrey	1	07/29/2019	08/29/2019
Gullett III., Jacob "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

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

# Live Demo

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



# Which clinical areas of your practice need more oversight?



# Thank You!

- Reporting Drop-In Session (Fri 7/19, 1:15-2:15)

Reach out to PCC support for help with your specific report needs. PCC reporting is very customizable!

Tim Proctor  
tim@pcc.com

# What Questions Do You Have?

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