

# Patient List for Mass Upload in Accuro

## Preamble:

OntarioMD has developed queries to identify patients for Mass Upload into the COVax<sub>ON</sub> system and to identify patients with polysorbate allergy for referral. The queries, as listed below, have been published to the Accuro cloud and are available for download into your EMR. They may need to be customized to suit the practice as described in **Notes** below.

OntarioMD Practice Enhancement Consultants are available to assist with queries and provide training on Mass Uploads to the COVax<sub>ON</sub> system. Contact [covaxon.support@ontariomd.com](mailto:covaxon.support@ontariomd.com) to request assistance.

## Prerequisites for Mass Upload:

- Excel (or excel like program ie: OpenOffice, Notepad++) on the computer being used for the mass upload
- Super-user access within the COVax<sub>ON</sub> system is required to mass upload
- Access to and familiarity with running and editing queries

The queries as listed below have been published to the Accuro cloud

**\*Please ensure to select the most recently dated version(s) of the queries\***

### 1. OMD COVID (55 - 69) all pts w contact & address info

*\*This query does NOT exclude patients based on risks; but captures everyone within the age range, to allow clinicians to make the clinical decision to exclude or not*

Report displays:

*- Last Name, First Name, DOB, Gender, Healthcard, Home Phone, Cell Phone, Email, Address, City, Province, Postal Code*

### 2. OMD COVID (55 - 69) all pts w mandatory fields, phone and email ONLY

*\*Same as 'OMD COVID (55 - 69) all pts w contact & address info' but report ONLY displays:*

*- Last Name, First Name, DOB, Gender, Healthcard, Home Phone, Cell Phone, Email*

### 3. OMD COVID (55 - 69) excl pts w polysorbate allergy

*\*Same as 'OMD COVID (55 - 69) all pts w contact & address info' but EXCLUDES patients with a polysorbate allergy*

Report displays:

*- Last Name, First Name, DOB, Gender, Healthcard, Home Phone, Cell Phone, Email, Address, City, Province, Postal Code*

### 4. OMD COVID (55 - 69) ONLY pts w polysorbate allergy

*\*Identifies patients with a polysorbate allergy for referral to allergist, if applicable*

Report displays:

*- Last Name, First Name, DOB, Gender, Healthcard, Home Phone, Cell Phone, Email, Address, City, Province, Postal Code, Allergy Name (Polysorbate)*

## NOTES:

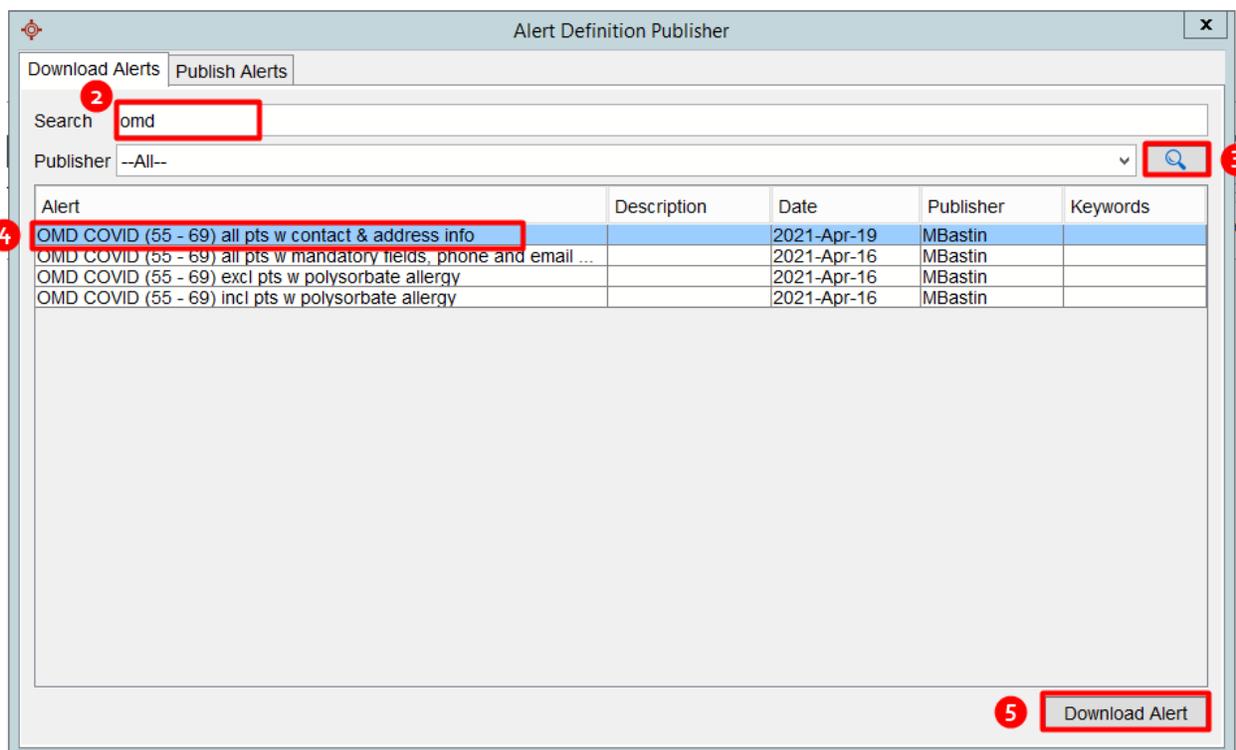
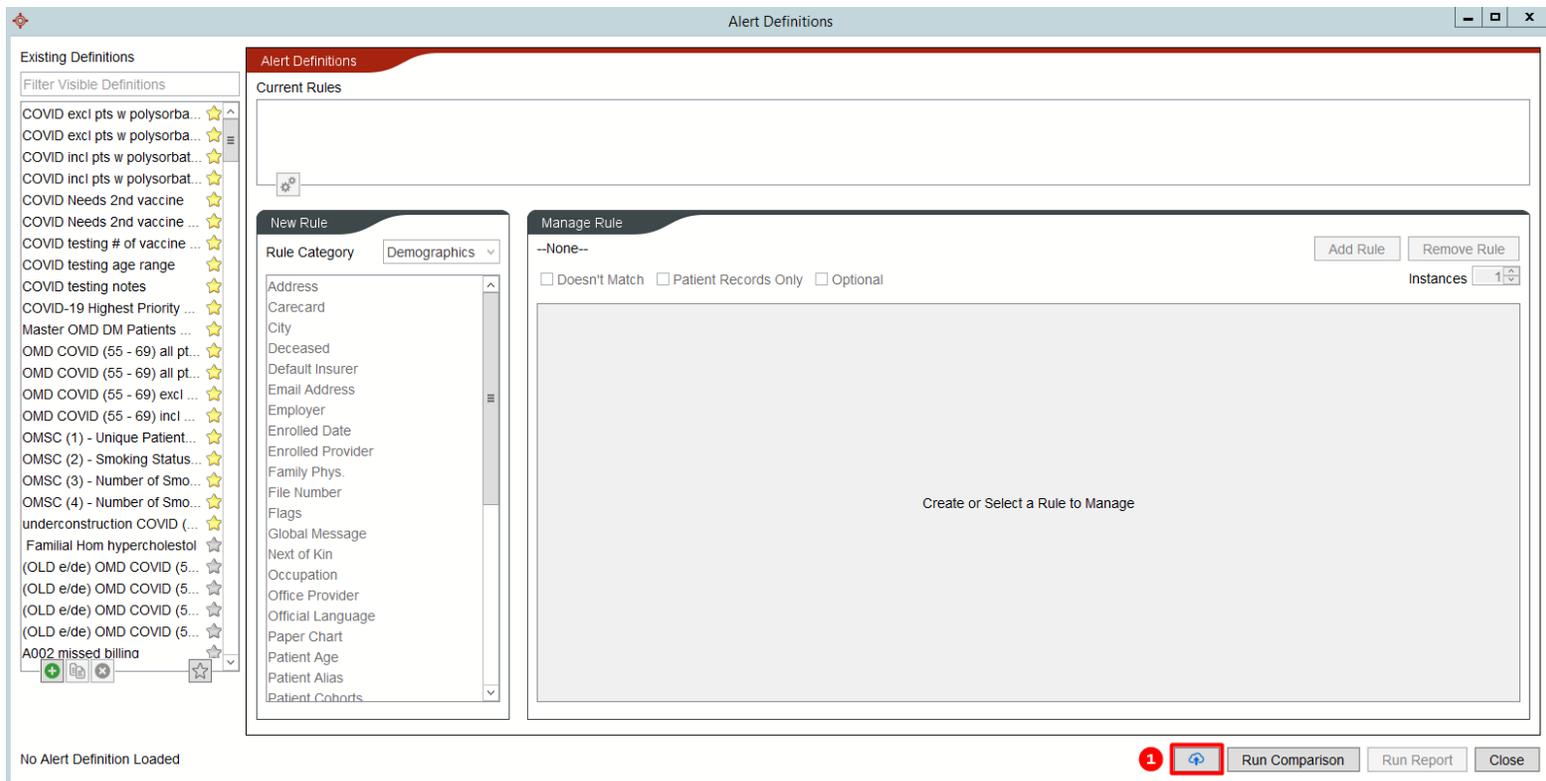
- The age rule/line item in the query is by age and not DOB so the query may return patients whose DOB falls after Dec 31, 66 will need to be removed from the list (birthdate cutoff will differ depending on age range) – **once exported to excel, the age/column can be sorted by date and those patients whose date of birth fall outside the target population can be deleted from the excel list**
- If you wish to modify the age categories in the query, you will need to edit the second and third query rules/lines (**see 'Modifying Query to Find Patients of Another Age Range'**)
- The fourth rule/line number within the query specifies that an 'Appointment Exists' – this rule/line will need to be updated to reflect the appointments that your clinic has scheduled for the vaccinations (**see 'Updating Query to Find Clinic's COVID Vaccine Appointments'**)  
**\*if you do not wish to search by appointment, you will delete the fourth rule/line number 'Appointment Exists'**

- Should you wish to limit your patient search to ONLY those patients who have a previously arrived appointment within a defined timeframe, you will need to add a rule/line to the search criteria **(see 'Adding Arrived Appointment Rule/Line')**
- To maintain the report columns, 'patient records only' has not been used
- Once the query is run, the generated report is exported (using export button) which saves as a csv file – **Please ensure to 'Encrypt' and password protect the export file as this will be saved to your local computer**
- Screenshots within this document may reference previous versions of queries and are for illustrative purposes as the instructional steps remain the same – **Please ensure to download and work with the most recently dated queries**

# Importing Queries into Accuro

To import the query published to the Accuro cloud, you will:

Click the Accuro Bullseye > Reports > Query Builder (Alerts) > click the cloud icon <sup>1</sup> > in the Search field <sup>2</sup>, type in the name of the query you would like to download > click the magnifying glass <sup>3</sup> > highlight the query <sup>4</sup> you wish to download > click on 'Download Alert' <sup>5</sup> > click 'OK' <sup>6</sup> to the 'Alert downloaded successfully' message

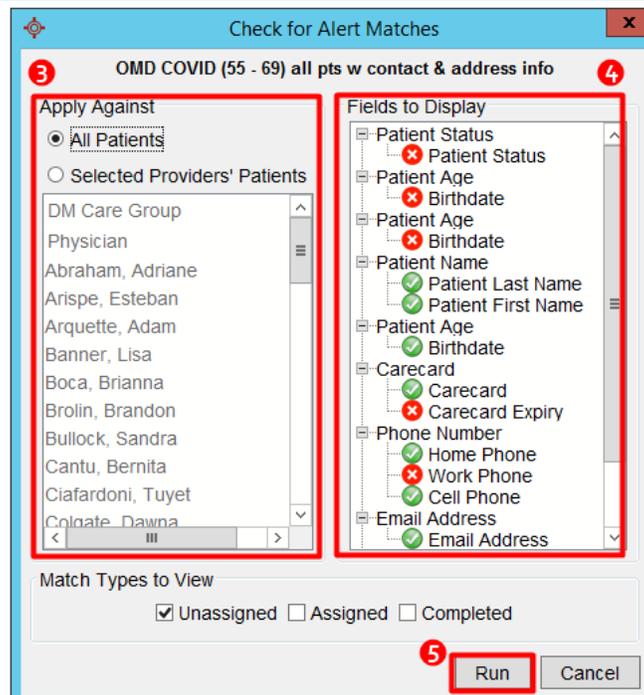
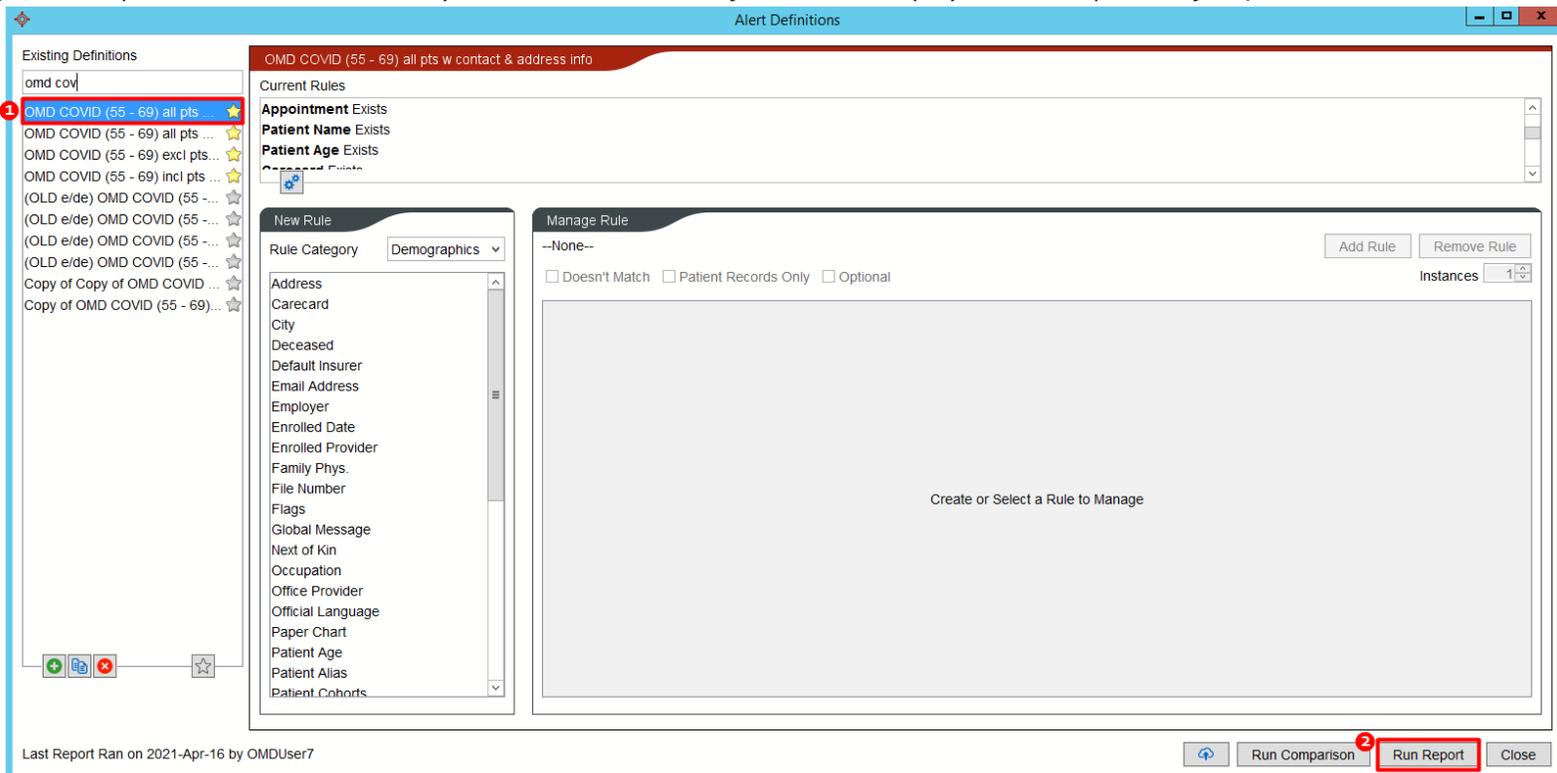


# Exporting Query Results from Accuro

To export the query results from Accuro, you will:

Click the Accuro Bullseye > Reports > Query Builder (Alerts) > Highlight the query <sup>1</sup> you wish to run > click on 'Run Report' <sup>2</sup> > select 'all patients' or 'selected providers' under the 'Apply Against' <sup>3</sup> option > if there are additional columns you wish to display, you may select them under 'Fields to Display' <sup>4</sup> > click 'Run' <sup>5</sup> > from the generated report, click 'Export' <sup>6</sup> > in the Export Result window, select 'Encrypt' <sup>7</sup> > enter and confirm a password for the file <sup>8</sup> > click the ellipsis to choose a location to save the file <sup>9</sup> > in the window that opens, click in the 'Look in' field <sup>10</sup> and **select a location on your local computer** where you wish to save the file <sup>11</sup> > enter a file name <sup>12</sup> > click 'Open' <sup>13</sup> > click 'Export' <sup>14</sup>

(Note: the path to the location where you selected to save the file will now display in the 'Output File' field)



OMD COVID (55 - 69) all pts w contact & address info

OMD COVID (55 - 69) all pts w contact & address info

ID	Status	Patient Last Name	Patient First Name	Birthdate	Carecard	Home Phone	Cell Phone	Email Address
	Unassigned	Akkerman	Raquel	11/15/1964	2936548185pf	( ) -	( ) -	
317	Unassigned	Albers	Andreas	12/20/1961	4446961817nf	(416) 281-6317	(416) 281-6317	noemail3@
000	Unassigned	Anda	David	07/22/1955	4517623554KD	(000) 000-0000	(000) 000-0000	
	Unassigned	ANDREW	Susannah	04/09/1955	8780461706zg	( ) -	( ) -	
746	Unassigned	Antonetty	Erlinda	07/09/1957	1631301387ag	(905) 321-2746	(905) 647-2123	noemail2@
	Unassigned	Ardolino	Magaly	03/31/1955	6058813376dc	( ) -	( ) -	
	Unassigned	Arispe	Esteban	02/28/1967	4805916816gj			
	Unassigned	Bacio	Felisha	12/26/1965	0952258044pu	( ) -	( ) -	
	Unassigned	Balson	Mara	03/11/1964	3687663827cy	( ) -	( ) -	
	Unassigned	BCHS	ENOS	10/04/1954	3003458035		(519) 888-7897	
	Unassigned	Birky	Doreen	12/18/1964	9481123942ku	( ) -	( ) -	
	Unassigned	Blansett	Sofia	06/15/1951	7372742960ak	( ) -	( ) -	
	Unassigned	Boisvert	Paula	10/04/1964	7392722968xf	( ) -	( ) -	
	Unassigned	Braaten	Cruz	08/25/1956	7496074019kz	( ) -	(416) 509-0842	noemail3@
	Unassigned	Breznay	Romelia	10/02/1952	7027515241dg	( ) -	( ) -	
	Unassigned	Brockway	Cierra	12/13/1953	3806665505yt	( ) -	( ) -	
224	Unassigned	Buchanan	Melissa	01/07/1957		(416) 591-6224	(000) 000-0000	
	Unassigned	Burkhalter	Debroah	04/14/1961	2766092890xu	( ) -	(905) 290-0129	noemail4@
	Unassigned	Caal	Michele	09/16/1965	5357521896xi	( ) -	( ) -	

143 Matches

- Select Action -

Completed

Rerun

Print All

Export

Close

**Export Result**

Security

**There is sensitive patient data in this export. It is recommended that the export be encrypted.**

Encrypt

Password:

Confirm:

Output File

...

Export Close

**Open**

Look in: Desktop

Local Disk (C: on ^

Users

melissa.bastin

Desktop

Music

Network Drive (Z:

Pictures

Videos

File name:

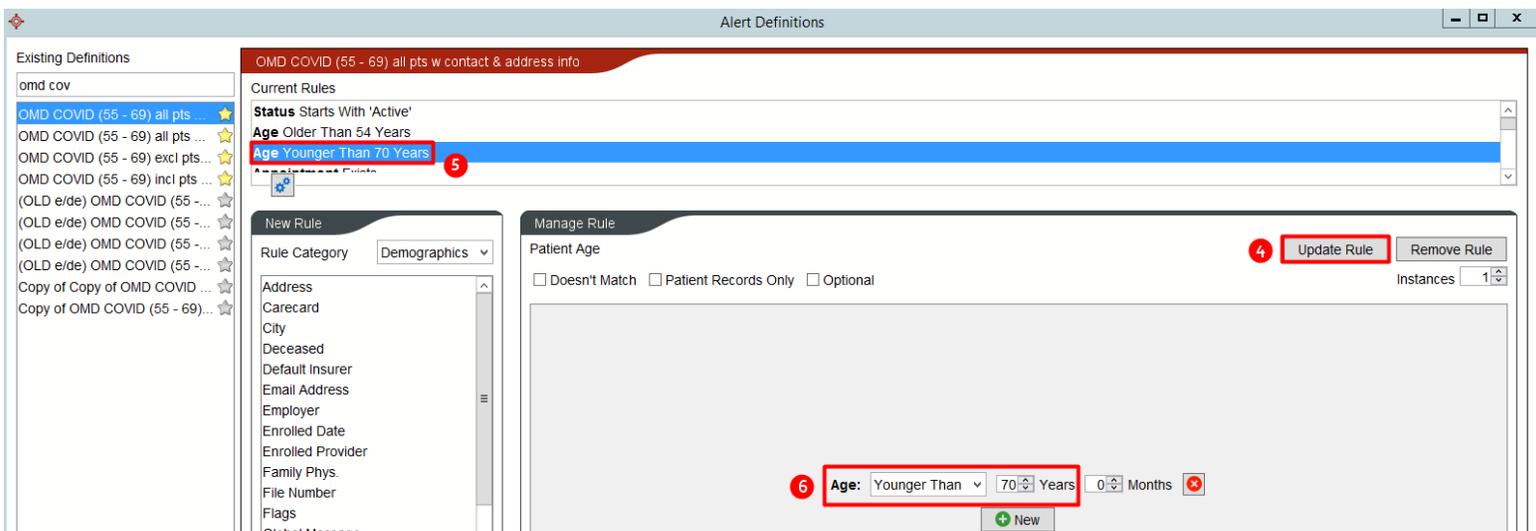
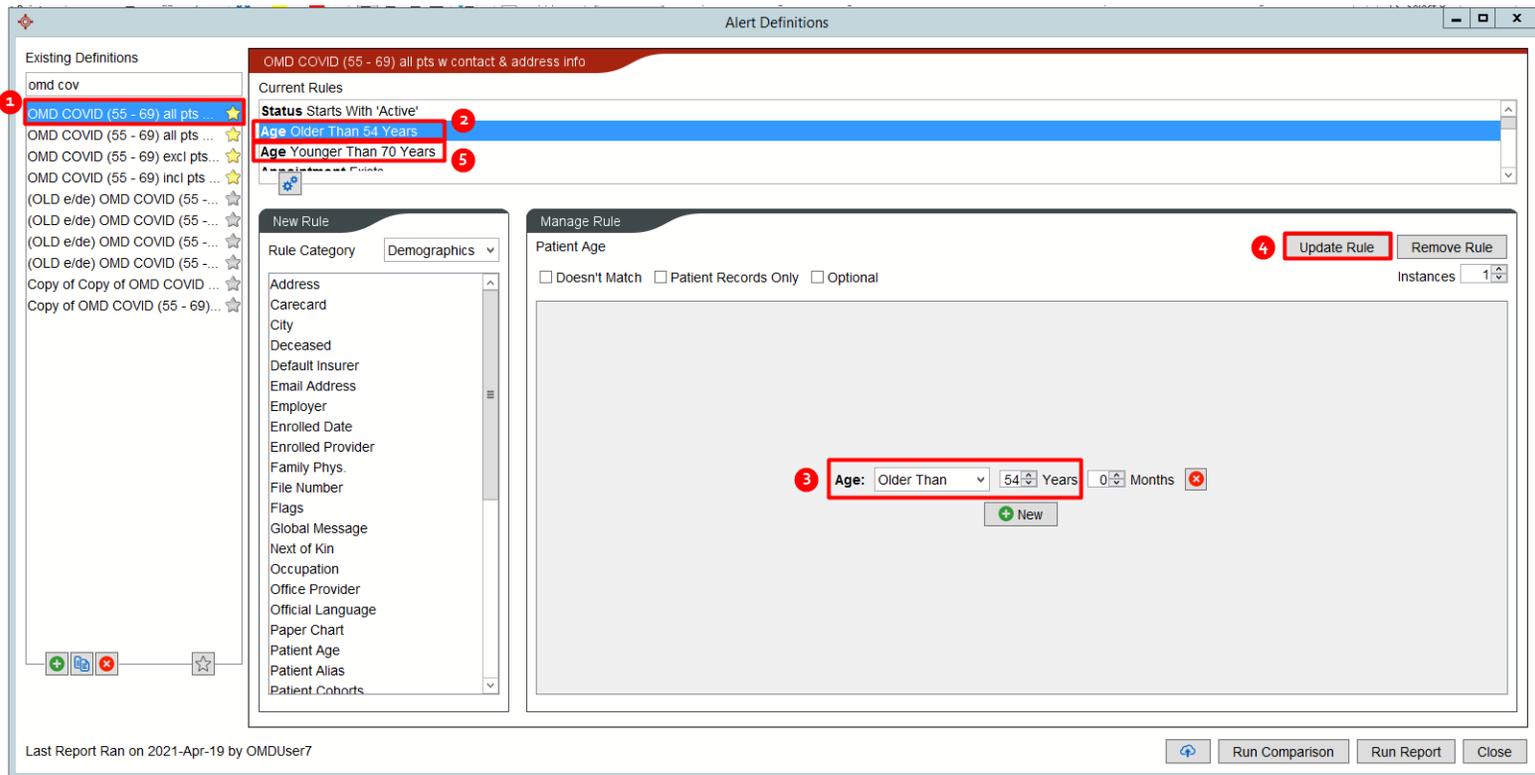
Files of type: All Files

Open Cancel

# Modifying Query to Find Patients of Another Age Range

To update the query to find patients of another age range, you will:

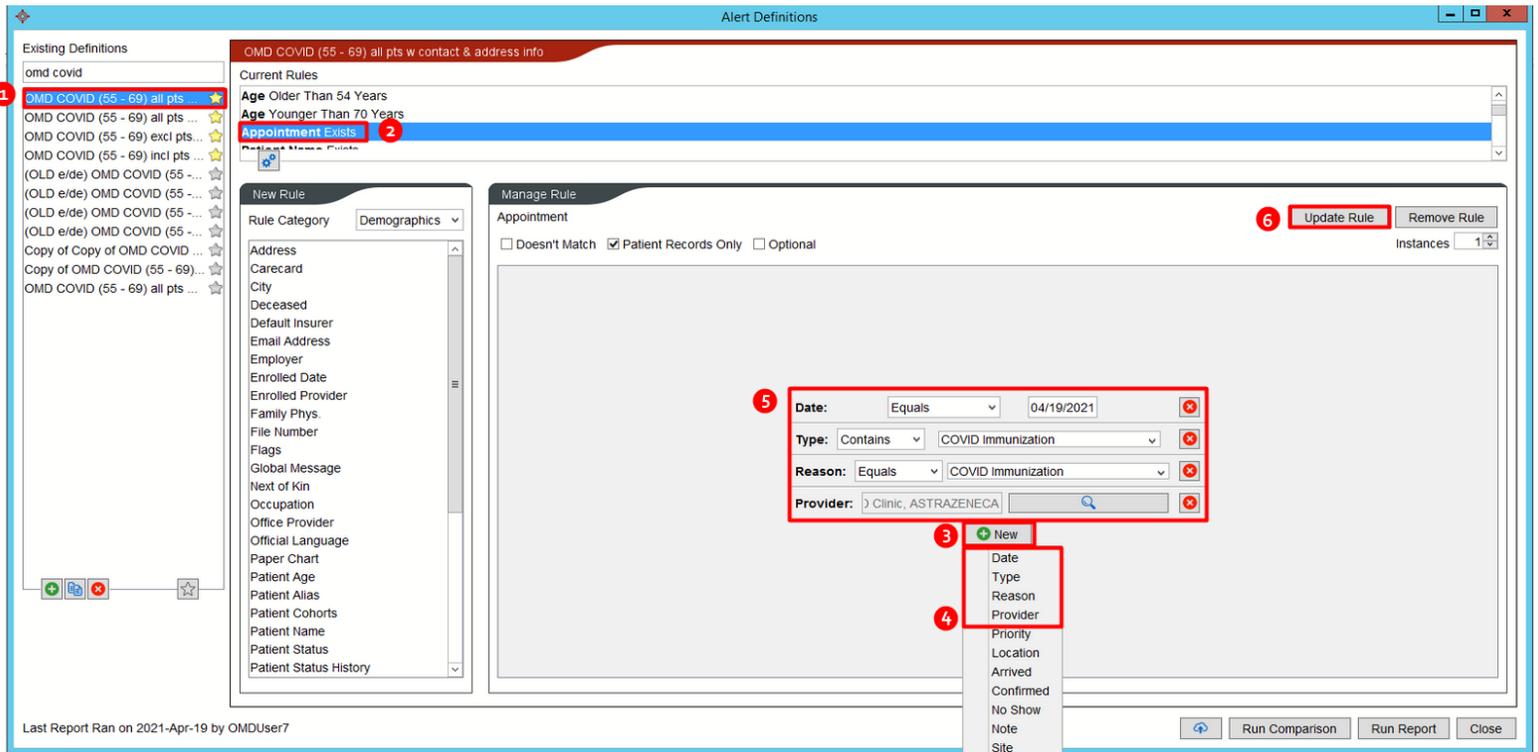
- 1 Click the Accuro Bullseye > Reports > Query Builder (Alerts) > Highlight the query in the list
- 2 Highlight the second query rule/line 'Age Older Than...' in the Manage Rule window, enter the desired age for the 'Older Than' constraint
- 3 click 'Update Rule' within the 'current rules' section, highlight the third query rule/line 'Age Younger Than...'
- 4 in the Manage Rule window, enter the desired age for the 'Younger Than' constraint > again, click 'Update Rule'



# Updating Query to Find Clinic's COVID Vaccine Appointments

To update the 'Appointment Exists' rule/line within the query to find ONLY patients with a scheduled COVID vaccine appointment, you will:

Click the Accuro Bullseye > Reports > Query Builder (Alerts) > Highlight the query in the list <sup>1</sup> > within the 'current rules' section, highlight the fourth query rule/line 'Appointment Exists' <sup>2</sup> > in the Manage Rule window, click 'New' <sup>3</sup> > select the constraints that will identify your vaccine appointments ie: Date and/or Type and/or Reason and/or Provider <sup>4</sup> > select items from the picklist and/or enter values for the constraints that were added <sup>5</sup> > click 'Update Rule' <sup>6</sup>



If you do not wish to search by appointment, you will need to delete the fourth rule/line number 'Appointment Exists' from the query.

Highlight the query in the list <sup>7</sup> > within the 'current rules' section, highlight the fourth query rule/line numbered 'Appointment Exists' <sup>8</sup> > in the Manage Rule window, click 'Remove Rule' <sup>9</sup>



# Adding Arrived Appointment

To add a rule/line of criteria to the query to find only patients who have had a previously arrived appointment within a specified duration, you will:

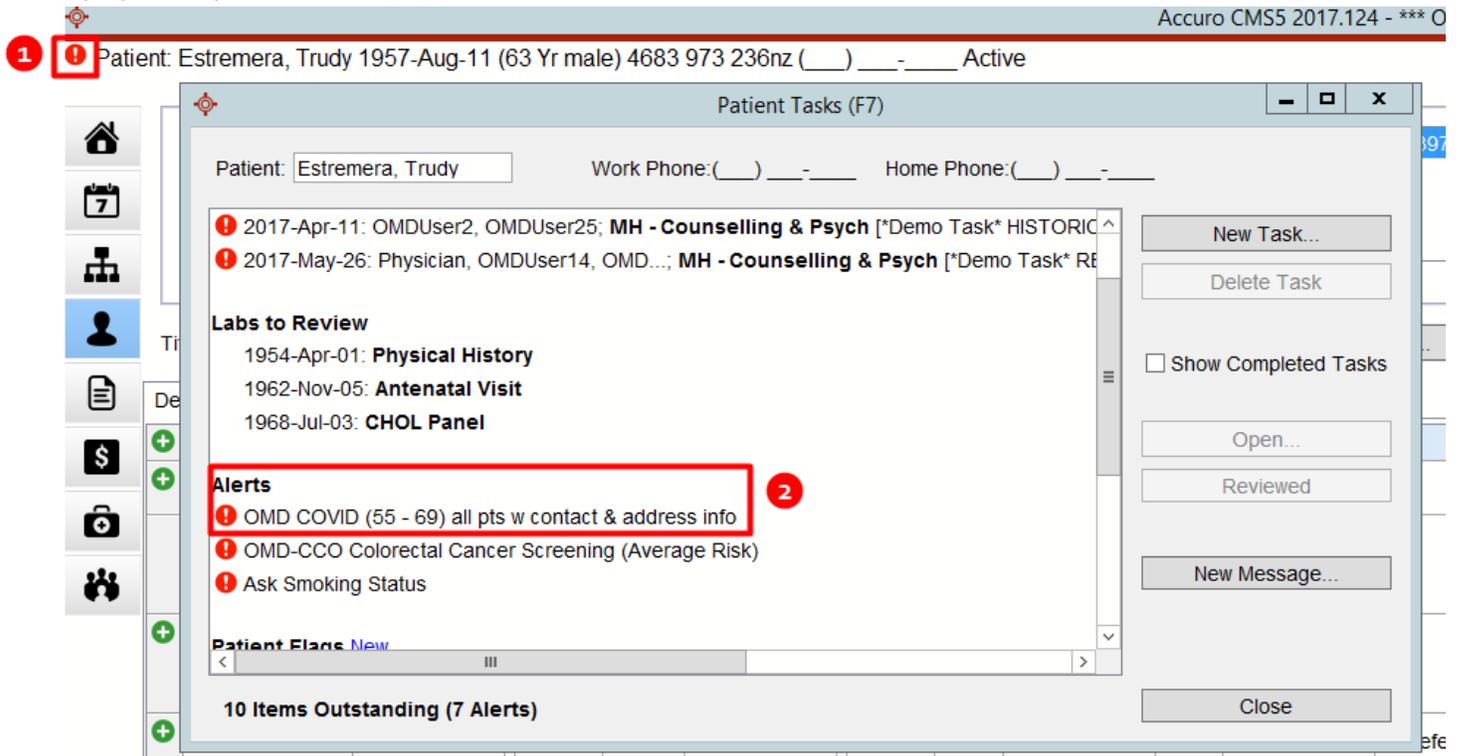
Click the Accuro Bullseye > Reports > Query Builder (Alerts) > Highlight the query in the list > in the Rule Category dropdown field, select 'Appointments' <sup>1</sup> > click on 'Appointment' <sup>2</sup> in the list below > in the Manage Rule window, click 'New' <sup>3</sup> > select 'Arrived' <sup>4</sup> > select 'Yes' <sup>5</sup> in the Arrived dropdown field > in the Manage Rule window, click 'New' <sup>3</sup> > select 'Date' <sup>6</sup> > in the Date dropdown fields, select 'In the Last', enter the desired quantity and select desired calendrical measurement <sup>7</sup> > click 'Add Rule' <sup>8</sup>

The screenshot displays the 'Alert Definitions' window. On the left, the 'Existing Definitions' list includes 'OMD COVID (55 - 69) all pts ...' (1). The 'Current Rules' list shows 'Appointment Exists' (2). The 'New Rule' dialog is open, with 'Appointments' selected in the 'Rule Category' dropdown (8) and 'Appointment' selected in the list below. The 'Manage Rule' dialog is also open, showing 'Appointment' as the rule type. The 'Arrived' dropdown is set to 'Yes' (5). The 'Date' dropdown is set to 'In the Last' (7), with '5' entered in the quantity field and 'Years' selected in the measurement dropdown. The 'Add Rule' button is highlighted (8). A context menu is open over the 'Arrived' dropdown, with 'Arrived' selected (4). The 'Date' dropdown is also open, with 'Date' selected (6). The 'New' button is highlighted (3). The 'Instances' field is set to '1'. The status bar at the bottom indicates 'Last Report Ran on 2021-Apr-19 by OMDUser7'.

# Point of Care Tools

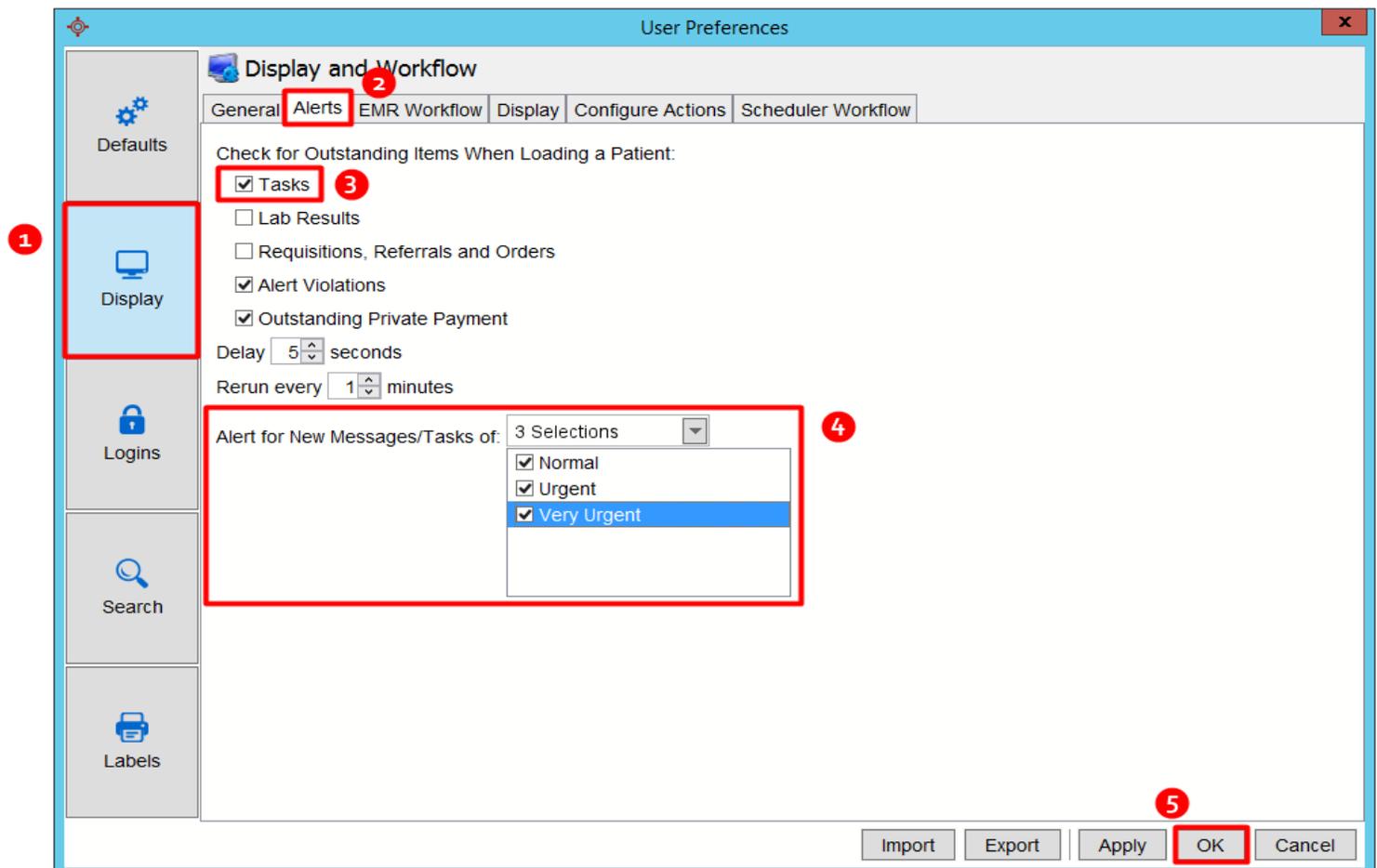
## Turning Queries into Chart Alerts

Query Builder (Alerts) can generate Alerts to appear on patient's who fall into the query cohort. When enabled, a clickable exclamation mark <sup>1</sup> will appear to the left of a patient's name to list the outstanding items. Additionally, the outstanding alert will display in the patient's tasks (F7) <sup>2</sup>



To enable query alert indicator feature in the EMR, you will:

Click the Accuro bullseye > click 'User Preferences' > click 'Display' <sup>1</sup> > click 'Alerts' <sup>2</sup> > select 'Tasks' <sup>3</sup> > select desired 'Urgency' > click 'OK' <sup>5</sup>



To turn on the alert function on a particular query, click the Accuro Bullseye > Query Builder (Alerts) > click to highlight the query you wish to turn into a patient alert > click on the cog wheels icon <sup>1</sup> in the Alert Definitions Options, select 'Include in Tasks' <sup>2</sup> > click 'OK' <sup>3</sup>

(Note: the OMD COVID queries have 'Include in Tasks' enabled by default. However, users may need to modify user preferences to enable query alert indicator feature as explained above)

The screenshot shows the 'Alert Definitions' window. On the left, a list of 'Existing Definitions' includes 'OMD COVID (55 - 69) all pts ...'. The main area shows 'Current Rules' for 'OMD COVID (55 - 69) all pts w contact & address info', with rules for 'Status Starts With 'Active'', 'Age Older Than 54 Years', and 'Age Younger Than 70 Years'. The 'Alert Definition Options' dialog is open, with 'Include in Tasks' checked. The 'For Users' dropdown is set to 'Toronto Office' and lists 'Administrator', 'OMDUser1', 'OMDUser10', and 'OMDUser11'. The 'Default Display Fields' list includes 'Patient Status', 'Patient Age', 'Birthdate', 'Patient Name', 'Patient Last Name', 'Patient First Name', 'Carecard', 'Carecard Expiry', 'Phone Number', 'Home Phone', and 'Work Phone'. The 'OK' button is highlighted with a red circle and the number 3.

### Applying Mass Actions on Patients from a Query

Mass actions can be applied to patients who are identified within a query by selecting an option from the 'Select Action' <sup>1</sup> dropdown. When an action is selected, it is bulk applied to all identified patients who are highlighted within the list, when the query was run (use 'Control' to select multiple individual patients OR 'Control' + 'A' will select all patients).

- Actions available:
- Create Task
  - Create notes
  - Create Bill
  - Assign Flag
  - Create Patient Cohort
  - Apply vaccine
  - Create forms
  - Set Patient Status
  - Remove Flag
  - Assign to Patient Cohort

The screenshot shows a table of patient data with 143 matches. The table has columns for Last Name, First Name, PHN, Birthdate, Sex, Home Phone, Status, Patient Last Name, and Patient First Name. A dropdown menu is open at the bottom right, showing a list of actions: 'Select Action -', 'Create Task', 'Apply Vaccine', 'Create Notes', 'Create Forms', 'Create Bill', 'Set Patient Status', and 'Assign Flag'. The 'Create Task' option is highlighted with a red circle and the number 1.

Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Last Name	Patient First Name
Akkerman	Raquel	2936548185pf	11/15/1964	M	( ) -	Unassigned	Akkerman	Raquel
Albers	Andreas	4446961817nf	12/20/1961	F	(416) 281-6317	Unassigned	Albers	Andreas
Anda	David	4517623554KD	07/22/1955	M	(000) 000-0000	Unassigned	Anda	David
ANDREW	Susannah	8780461706zg	04/09/1955	F	( ) -	Unassigned	ANDREW	Susannah
Antonetty	Erlinda	1631301387ag	07/09/1957	F	(905) 321-2746	Unassigned	Antonetty	Erlinda
Ardolino	Magaly	6058813376dc	03/31/1955	M	( ) -	Unassigned	Ardolino	Magaly
Arispe	Esteban	4805916816gj	02/28/1967	M		Unassigned	Arispe	Esteban
Bacio	Felisha	0952258044pu	12/26/1965	F	( ) -	Unassigned	Bacio	Felisha
Balson	Mara	3687663827cy	03/11/1964	M	( ) -	Unassigned	Balson	Mara
BCHS	ENOS	3003458035	10/04/1954	M		Unassigned	BCHS	ENOS
Birky	Doreen	9481123942ku	12/18/1964	M	( ) -	Unassigned	Birky	Doreen
Blansett	Sofia	7372742960ak	06/15/1951	UK	( ) -	Unassigned	Blansett	Sofia
Boisvert	Paula	7392722968xf	10/04/1964	F	( ) -	Unassigned	Boisvert	Paula
Braaten	Cruz	7496074019kz	08/25/1956	M	( ) -	Unassigned	Braaten	Cruz