Patient List for Mass Upload in Accuro

Preamble:

OntarioMD has developed queries to identify patients for Mass Upload into the COVax_{ON} 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_{ON} system. Contact <u>covaxon.support@ontariomd.com</u> 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_{ON} 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 <u>ONLY</u> 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 1 > in the Search field 2 , type in the name of the

query you would like to download > click the magnifying glass ³ > highlight the query ⁴ you wish to download > click on 'Download

Alert' ⁵ > click 'OK' ⁶ to the 'Alert downloaded successfully' message

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

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



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Modifying Query to Find Patients of Another Age Range

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

Click the Accuro Bullseye > Reports > Query Builder (Alerts) > Highlight the query in the list ¹ > within the 'current rules' section, highlight the second query rule/line 'Age Older Than...' ² > in the Manage Rule window, enter the desired age for the 'Older Than' ³ constraint > click 'Update Rule' ⁴ > within the 'current rules' section, highlight the third query rule/line 'Age Younger Than...' ⁵ > in the Manage Rule window, enter the desired age for the 'Younger Than' ⁶ constraint > again, click 'Update Rule' ⁴

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Updating Query to Find Clinic's COVID Vaccine Appointments

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

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

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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 ⁷ > within the 'current rules' section, highlight the fourth query rule/line numbered 'Appointment

Exists' ⁸ > in the Manage Rule window, click 'Remove Rule' ⁹

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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' ¹ > click on 'Appointment' ² in the list below > in the Manage Rule window, click 'New' ³ > select 'Arrived' ⁴ > select 'Yes' ⁵ in the Arrived dropdown field > in the Manage Rule window, click 'New' ³ > select 'Date' ⁶ > in the Date dropdown field > in the Manage Rule window, click 'New' ³ > select 'Date' ⁶ > in the Date dropdown field = select 'In the Last' enter the desired quantity and select desired calendrical measurement ⁷ > slick (Add Bule' ⁸

fields, select 'In the Last',	enter the desired quantity and select	t desired calendrical measurement '	<pre>' > click 'Add Rule'</pre>
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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 ¹ 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) ²

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ю́ О	Ask Smoking Status Patient Flags New	New Message

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

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

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		Import Export Apply OK Cancel

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 2^{1} in the Alert Definitions Options, select 'Include in Tasks' > >

click 'OK' ³

(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)

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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' ¹ 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).

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