


Quick Reference

How to Manage HRM COVID-19 Historical Reports through HRM

Video: EMR Demo

This Quick Reference gives step-by-step instructions covered in the video, showing how to run a basic query to review the HRM historical data and add it into your immunization summary.

Run the query and pull the list of data:

1. On the bottom left-hand corner of your screen, click the Accuro icon ().
 - i. In the blank search field, type in the word “query”.
 - ii. Select ‘Query Builder (Alerts)’ from the search results. This will open up a new window called **Alert Definitions**.
 - iii. [Import this query](#) (if not already done so) by clicking on the ‘Alert Publisher’ button.
 - iv. On the left-hand menu, click on ‘COVID-19 Historical Reports via HRM® Management’.
2. The ‘COVID-19 Historical Reports via HRM® Management’ window will be displayed.

Review the following **lines of information and their settings** (Note: these lines are clickable and located near the top of this ‘COVID-19 Historical Reports via HRM® Management’ window):

- 1. **Status** = ‘Active’: This searches any active patient within your practice.
- 2. **Lab Type** Contains ‘Immunization Note’ *AND* **Collection Date** in the Last 1 Year *AND* **Lab Test** Contains ‘COVID Immunization Note’ *AND* **Include Reviewed Labs**
 - This line of information is the actual HRM Report.
 - Note the selected settings in the **following image on page 2** (as shown in video):

COVID-19 Historical Reports via HRM® Management

Current Rules

Status = 'Active'

Lab Type Contains 'Immunization Note' AND Collection Date In the Last 1 Year AND Lab Test Contains 'COVID Immunization Note' AND Include Reviewed Labs

Vaccine/Immunization = MODERNA COVID-19 100 MCG/0.5ML OR = PFIZER-BIONTECH COVID-19 VACC OR = ASTRAZENECA COVID-19 VACCINE

New Rule

Rule Category: Demographics

Address
Carecard
City
Deceased
Default Insurer
Email Address
Employer
Enrolled Date
Enrolled Provider
Family Phys.
File Number
Flags
Global Message
Next of Kin
Occupation
Office Provider
Official Language
Paper Chart
Patient Age
Patient Alias
Patient Cohorts
Patient Name
Patient Status

Manage Rule

Lab Result

Update Rule Remove Rule

Instances 1

☐ Doesn't Match ☐ Patient Records Only ☐ Optional

Lab Type: Contains Immunization Note

Collection Date: In the Last 1 Years

Lab Test: Contains COVID Immunization Note

New

☐ Only Check Latest Result
☒ Include Reviewed Labs
☐ Only Abnormal Results

- **More on 'Lab Type' settings:**

- i. **Collection Date:** Refers to the actual date the report was brought into your system.

Example:

- To run a daily report, select 'In the Last' '1' 'Day' from the drop-down menus.
- To run a weekly report, select 'In the Last' '7' 'Days' from the drop-down menus.

TIP: Avoid running this report on a Monday. Holiday Mondays will not work and will result in a missed day in your report.

- ii. **Only Check Latest Result:** This box should be **UNSELECTED**, as you are searching for historical data (i.e., not current information).
- iii. **Include Reviewed Labs:** This box should be **SELECTED**. This includes labs that have already been reviewed by physicians.
- iv. **Only Abnormal Results:** This box should be **UNSELECTED**, as there are no abnormal results.

- 3. **Vaccine/Immunization** = MODERNA COVID-19 100 MCG/0.5ML OR = PFIZER-BIONTECH COVID-19 VACC OR = ASTRAZENECA COVID-19 VACCINE
 - This line of information is highlighted in red, because the 'Doesn't Match' box option is selected under 'Manage Rule > Immunizations' section. This means that the search being done is looking into the patients' charts for anyone who does NOT have an AstraZeneca, Pfizer or Moderna vaccine. See these selected settings in the **image below** (as shown in video):

COVID-19 Historical Reports via HRM@ Management

Current Rules

Status = 'Active'

Lab Type Contains 'Immunization Note' AND Collection Date In the Last 1 Year AND Lab Test Contains 'MEDICAL RECORDS' AND Include Reviewed Labs

Vaccine/Immunization = MODERNA COVID-19 100 MCG/0.5ML OR = PFIZER-BIONTECH COVID-19 VACC OR = ASTRAZENECA COVID-19 VACCINE

New Rule

Rule Category: Demographics

Address
Carecard
City
Deceased
Default Insurer
Email Address
Employer
Enrolled Date
Enrolled Provider
Family Phys.
File Number
Flags
Global Message
Next of Kin
Occupation
Office Provider
Official Language
Paper Chart
Patient Age
Patient Alias

Manage Rule

Immunizations

☒ Doesn't Match ☐ Patient Records Only ☐ Optional

Update Rule Remove Rule

Instances: 2

Vaccine/Immunization:

MODERNA COVID-19 ✖

OR

PFIZER-BIONTECH CC ✖

OR

ASTRAZENECA COVID ✖

+ New

☐ Overdue Vaccinations

☐ Exclude Optional Vaccinations

- **More on 'Vaccine/Immunization' settings:**
 - Overdue Vaccinations:** Leave this field **UNSELECTED**.
 - Exclude Optional Vaccinations:** Leave this field **UNSELECTED**.
 - Instances** (top right-hand corner): Select "2" from the drop-down menu. This ensures information is pulled for any patient in your practice who does NOT have two vaccine doses recorded in their Immunization Summary.

3. When all lines of information and their settings (as outlined above in Step 2) are confirmed, click 'Run Report'.

4. A **Check for Alert Matches** window will be displayed.
 - i. Under 'Fields to Display' > 'Lab Result', ensure that '**Observation Date**' (the date the vaccine was given) and '**Note**' (outlines what vaccine information you need) have a **green checkmark**.
 - ii. Under 'Apply Against', select either 'All Patients' or 'Selected Providers' Patients' to run the report against all patients in your practice, or selected providers' patients only.
 - iii. Under 'Match Types to View', the 'Unassigned' box should be **SELECTED**. Leave the 'Assigned' and 'Completed' boxes **UNSELECTED**.
5. Click "Run".

A list will be generated of all the patients in your practice that meet the parameters that were set in Steps 2-4.

Sort and manage the generated list – add the HRM historical data into your immunization summary:

6. Click on a list's column header to sort by that descriptor. For example, click on 'Observation Date' to sort the list by the date the vaccine was administered.
7. You can now add the HRM historical data into your immunization summary. See steps below from the video demo.

Example shown in video:

This example uses a list that has been sorted by '**Observation Date**', and shows how to add **Moderna vaccine data** into the patient's immunization summary.

- i. Select all patients whose 'Observation Date' is the same (e.g., 06/03/2021). NOTE: When patients have been selected

successfully, the entire row(s) will be highlighted in a blue-green colour.

- ii. Drag the horizontal scrollbar (at the bottom of the list) to the right until you see the type of vaccine administered – in this case, Moderna and Pfizer vaccines are shown.
- iii. Press and hold the CTRL key, and then unselect all patients (rows) who received the Pfizer vaccine. This will unhighlight all Pfizer vaccines, leaving only all Moderna-administered patients selected/highlighted.
- iv. At the bottom of the list, click the 'Select Action' drop-down menu, and choose 'Apply Vaccine.'
- v. A **Vaccines** window will be displayed. From the list of vaccines, scroll down until you find and click 'Moderna'. Click 'OK'.
- vi. A **Patient Immunization** window will be displayed.
 - a. Remove the information or leave the fields blank for 'Vaccine Lot' and 'Lot Expiry Date'.
 - b. Select the 'Administered/Complete' box.
 - c. Under Immunization Details:
 - 1) In the 'Administered Date' entry field, update the date to the date the Moderna vaccine was administered (for the patients selected in Step 7. iii.). E.g., 06/03/2021
 - 2) Unselect 'Administered in Clinic' box. This will activate the adjacent 'Clinic' drop-down menu.
 - 3) Optional: From this adjacent drop-down menu, select the location of vaccine administration (e.g., 'Vaccination Clinic'). **NOTE:** If you don't have this option, you can add it or an option that suits your clinic (e.g., pharmacy, Public Health Unit, etc.) by clicking 'Manage' at the bottom of the drop-down menu.
 - 4) Click 'OK'. The Patient Immunization window will then close.
- vii. Navigate back to the generated patient list. Click on one of the patients in this list who was selected in Step 7. iii.

- viii. You will now see that the Moderna vaccine and is in the patient's Immunization Summary (left-hand side bar), along with the schedule/date of administration (e.g., 06/03/2021).

In this video demo, the same steps 7. iv – vii. are then repeated for those patients who received the Pfizer vaccine (who were initially unselected from 7. iii.).

- ix. Follow steps 7. i – vii. with each line (i.e., row) in the generated list until all lines have been addressed.

Each scheduled day, a new query will be run and report generated, which will result in a whole different list of patients.

For questions or additional support regarding COVID-19 Historical Reports via HRM[®] Management, please contact OntarioMD at support@ontariomd.com.