

# Patient Status

## OntarioMD i4C Dashboard Indicator

For more information regarding OntarioMD Indicators or the EMR i4C Dashboard Specification, please refer to:

<https://www.ontariomd.ca/emr-certification/emr-specification/ontariomd-indicator-library>

## 1. VERSION HISTORY

| INDICATOR VERSION | PUBLICATION DATE | REMARKS  |
|-------------------|------------------|--|
| 1.0               | 2019-02-18       | <ul style="list-style-type: none"> <li>Initial release</li> </ul>  |
| 2.0               | 2019-07-09       | <ul style="list-style-type: none"> <li>Active patient Indicator Segments increased from three to six, in order to separate rostered active patients from non-rostered active patients</li> <li>Added Indicator ID, Indicator Segment ID and Display Indicator Segment properties</li> <li>Changed format and content of Indicator User Help</li> <li>Changed format of Source property</li> <li>Indicator Segment IDs re-sequenced to provide consistency across indicators</li> <li>Indicator Segment Query Criteria clarifies that query result from a segment should produce a count of patients</li> </ul> |

## 2. INDICATOR DEFINITION

### 2.1 Indicator Properties

| PROPERTY          | VALUE  |
|-------------------|--|
| Indicator ID      | PRM-PAT-001  |
| Indicator Name    | Patient Status   |
| Indicator Version | 2.0  |
| Date Published    | 2019-07-09   |
| Description       | <p><b>Purpose:</b></p> <p>This indicator provides an overview of the patient population based on patient demographic status recorded in the EMR.</p> <p><b>Base Population:</b></p> <p>All patients with a patient demographic status recorded in the EMR.</p> <p><b>Indicator Segments:</b></p> <p>Indicator segments provide the following patient summaries:</p> <ul style="list-style-type: none"> <li>Count of patients with Active patient demographic status, who are currently rostered and who have been seen within the last year;</li> <li>Count of patients with Active patient demographic status, who are currently rostered and who have been most recently seen between 1 and 2 years ago;</li> <li>Count of patients with Active patient demographic status, who are currently rostered and who have been most recently seen more than 2 years ago;</li> <li>Count of patients with Active patient demographic status, who are currently not rostered and who have been seen within the last year;</li> <li>Count of patients with Active patient demographic status, who are currently not rostered and who have been most recently seen between 1 and 3 years ago;</li> <li>Count of patients with Active patient demographic status, who are currently not rostered and who have been most recently seen more than 3 years ago;</li> </ul> |

| PROPERTY                | VALUE   |
|-------------------------|---|
|                         | <ul style="list-style-type: none"> <li>Count of patients with Inactive patient demographic status;</li> <li>Count of patients with Deceased patient demographic status;</li> <li>Count of patients with a demographic status other than Active, Inactive, or Deceased.</li> </ul> <p><b>Suggested Indicator Use:</b></p> <p>Practice use of this indicator is to assist in reviewing and updating patient demographic and roster status for patients, so that patients with an Active demographic status recorded in the EMR reflect the current patient population.</p> <p><b>Measurements of Interest:</b></p> <p>None currently recommended.</p> |
| Source                  | OntarioMD   |
| Source Description      |   |
| Status                  | Active  |
| Category                | Practice Management   |
| Subcategory             | Patient Status  |
| Indicator Order         | 1   |
| Indicator Graphic Type  | Pie Chart, Bar Chart  |
| Indicator Graphic Notes |   |
| Indicator User Help     | <p><b>Patient Status</b></p> <p><b>Purpose:</b></p>   |

| PROPERTY | VALUE   |
|----------|---|
|          | <p>This indicator provides an overview of the patient population based on patient demographic status recorded in the EMR.</p> <p><b>Base Population:</b></p> <p>All patients with a patient demographic status recorded in the EMR.</p> <p><b>Indicator Segments:</b></p> <p>Indicator segments provide the following patient summaries:</p> <ul style="list-style-type: none"> <li>• Count of patients with Active patient demographic status, who are currently rostered and who have been seen within the last year;</li> <li>• Count of patients with Active patient demographic status, who are currently rostered and who have been most recently seen between 1 and 2 years ago;</li> <li>• Count of patients with Active patient demographic status, who are currently rostered and who have been most recently seen more than 2 years ago;</li> <li>• Count of patients with Active patient demographic status, who are currently not rostered and who have been seen within the last year;</li> <li>• Count of patients with Active patient demographic status, who are currently not rostered and who have been most recently seen between 1 and 3 years ago;</li> <li>• Count of patients with Active patient demographic status, who are currently not rostered and who have been most recently seen more than 3 years ago;</li> <li>• Count of patients with Inactive patient demographic status;</li> <li>• Count of patients with Deceased patient demographic status;</li> <li>• Count of patients with a demographic status other than Active, Inactive, or Deceased.</li> </ul> <p><b>Suggested Indicator Use:</b></p> <p>Practice use of this indicator is to assist in reviewing and updating patient demographic and roster status for patients, so that patients with an Active demographic status recorded in the EMR reflect the current patient population.</p> |

| PROPERTY | VALUE   |
|----------|---|
|          | <p><b>Measurements of Interest:</b></p> <p>None currently recommended.</p> <p><b>Metric Criteria:</b></p> <p><u>Active and Rostered, seen this year:</u> Status of Active and Rostered where the most recent visit is less than 12 months ago.</p> <p><u>Active and Rostered, seen within 1-2 yrs:</u> Status of Active and Rostered where the most recent visit is between 12- 24 months ago.</p> <p><u>Active and Rostered, not seen in 2+ yrs:</u> Status of Active and Rostered where the most recent visit is more than 24 months ago.</p> <p><u>Active and Not Rostered, seen this year:</u> Status of Active and Not Rostered where the most recent visit is less than 12 months ago.</p> <p><u>Active and Not Rostered, seen within 1-3 yrs:</u> Status of Active and Not Rostered where the most recent visit is between 12- 36 months ago.</p> <p><u>Active and Not Rostered, not seen in 3+ yrs:</u> Status of Active and Not Rostered where the most recent visit is more than 36 months ago.</p> <p><u>Inactive:</u> All patients identified with a status of 'Inactive'</p> <p><u>Deceased:</u> All patients identified with a status of 'Deceased'</p> <p><u>Other:</u> All remaining patients</p> <ul style="list-style-type: none"> <li>• NOT Active</li> <li>• NOT Inactive</li> <li>• NOT Deceased</li> <li>• NOT identified as "Deleted"</li> </ul> |

| PROPERTY | VALUE  |
|----------|--|
|          | <b>TIP:</b> Ensure that patients that are current patients in the practice have an Active status set in demographics. Most Indicator tiles are based on Active patient population. |

## 2.2 Indicator Segment Properties

| PROPERTY                         | VALUE   | VALUE  | VALUE  | VALUE   | VALUE  | VALUE  | VALUE                                 | VALUE                                 | VALUE  |
|----------------------------------|---|--|--|---|--|--|---------------------------------------|---------------------------------------|--|
| Indicator Segment ID             | 1   | 2  | 3  | 4   | 5  | 6  | 7                                     | 8                                     | 9  |
| Indicator Segment Label          | Active Rostered, last seen this year  | Active Rostered, last seen within 1-2 yrs  | Active Rostered, last seen in 2+ yrs   | Active Not Rostered, last seen this year  | Active Not Rostered, last seen within 1-3 yrs  | Active Not Rostered, last seen in 3+ yrs   | Inactive                              | Deceased                              | Other  |
| Display Indicator Segment        | Yes   | Yes  | Yes  | Yes   | Yes  | Yes  | Yes                                   | Yes                                   | Yes  |
| Indicator Segment Query Criteria | <b>COUNT OF:</b><br>Active rostered patients, who are documented as being last seen in the last 12 months inclusive | <b>COUNT OF:</b><br>Active rostered patients, who are <b>NOT</b> documented as being last seen in the last 12 months inclusive<br><b>AND</b> who are documented as being last seen in the past 12-24 | <b>COUNT OF:</b><br>Active rostered patients, who are <b>NOT</b> documented as being last seen in the last 24 months inclusive | <b>COUNT OF:</b><br>Active patients who are <b>not</b> rostered patients, who are documented as being last seen in the last 12 months inclusive | <b>COUNT OF:</b><br>Active patients who are <b>not</b> rostered patients, who are <b>NOT</b> documented as being last seen in the last 12 months inclusive<br><b>AND</b> who are documented as being last seen in the past 12-36 | <b>COUNT OF:</b><br>Active patients who are <b>not</b> rostered patients, who are <b>NOT</b> documented as being last seen in the last 36 months inclusive | <b>COUNT OF:</b><br>Inactive patients | <b>COUNT OF:</b><br>Deceased patients | <b>COUNT OF:</b><br>All patients who are <b>NOT</b> Active<br><b>AND NOT</b> Inactive<br><b>AND NOT</b> Deceased<br><b>AND NOT</b> Deleted |



| PROPERTY                      | VALUE  | VALUE  | VALUE  | VALUE  | VALUE  | VALUE  | VALUE  | VALUE  | VALUE  |
|-------------------------------|--|--|--|--|--|--|--|--|--|
|                               |  | months inclusive   |  |  | months inclusive   |  |  |  |  |
| Indicator Segment Query Notes | <p><b>Active Patients</b> are patients identified as 'Active' in the Patient Status data element (DE01.016) within <i>Patient Demographics</i>.</p> <p><b>Rostered Patients</b> are patients identified as 'Enrolled' in the Enrollment Status data element (DE01.019) within <i>Patient Demographics</i>.</p> <p><b>Inactive Patients</b> are patients identified as 'Inactive' in the Patient Status data element (DE01.016) within <i>Patient Demographics</i>.</p> <p><b>Deceased Patients</b> are patients identified as 'Deceased' in the Patient Status data element (DE01.016) within <i>Patient Demographics</i>.</p> <p><b>Patient Last Seen Documented</b> may be based on <i>Appointment Date/Time</i> (DE15.001), where appointments of 'No Show', 'Cancelled' or 'Deleted' are excluded, or this may be based on any additional documentation supported by the EMR to track when a patient has been last seen (e.g., encounter notes).</p> |  |  |  |  |  |  |  |  |
| Patient List Criteria         | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age   | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age | <b>Mandatory</b><br>Patient Name<br><br>Unique Patient Identifier<br><br><b>Optional</b><br>Patient Date of Birth<br>Patient Age |

| PROPERTY           | VALUE   | VALUE                          | VALUE                          | VALUE                          | VALUE                          | VALUE                          | VALUE                          | VALUE                          | VALUE                          |
|--------------------|---|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
|                    | Patient Phone Number  | Patient Phone Number           | Patient Phone Number           | Patient Phone Number           | Patient Phone Number           | Patient Phone Number           | Patient Phone Number           | Patient Phone Number           | Patient Phone Number           |
|                    | Patient Enrollment Status   | Patient Enrollment Status      | Patient Enrollment Status      | Patient Enrollment Status      | Patient Enrollment Status      | Patient Enrollment Status      | Patient Enrollment Status      | Patient Enrollment Status      | Patient Enrollment Status      |
|                    | Patient Enrollment Status Date  | Patient Enrollment Status Date | Patient Enrollment Status Date | Patient Enrollment Status Date | Patient Enrollment Status Date | Patient Enrollment Status Date | Patient Enrollment Status Date | Patient Enrollment Status Date | Patient Enrollment Status Date |
|                    | Last Visit  | Last Visit                     | Last Visit                     | Last Visit                     | Last Visit                     | Last Visit                     | Last Visit                     | Last Visit                     | Last Visit                     |
| Patient List Notes | <p><b>Patient Name</b> is a combination of First Name (<i>DE01.003</i>) and Last Name (<i>DE01.002</i>) data items from <i>Patient Demographics</i>. Names may be displayed either as separate columns or concatenated into one column.</p> <p><b>Unique Patient Identifier</b> is any data item from <i>Patient Demographics</i> that can be used by a physician or clinic to uniquely identify a patient when displayed. Examples include Health Card Number (<i>DE01.008</i>) or Chart Number (<i>DE01.012</i>).</p> <p><b>Patient Date of Birth</b> is captured into <i>Patient Demographics</i> as Date of Birth (<i>DE01.007</i>).</p> <p><b>Patient Age</b> is calculated data item representing the difference between the current date and Date of Birth (<i>DE01.007</i>) from <i>Patient Demographics</i>. Age should be displayed in years.</p> <p><b>Patient Phone Number</b> is the preferred phone number for contacting a patient and may include Residence Phone (<i>DE02.007</i>), Cell Phone (<i>DE02.008</i>) or Work Phone (<i>DE02.009</i>) from <i>Patient Address</i>.</p> <p><b>Patient Enrollment Status</b> represents whether the patient is currently enrolled, was enrolled but has been terminated, or has never been enrolled, and is captured into <i>Patient Demographics</i> as Enrollment Status (<i>DE01.019</i>).</p> |                                |                                |                                |                                |                                |                                |                                |                                |

| PROPERTY | VALUE  | VALUE | VALUE | VALUE | VALUE | VALUE | VALUE | VALUE | VALUE |
|----------|--|-------|-------|-------|-------|-------|-------|-------|-------|
|          | <p><b>Patient Enrollment Status Date</b> represents the date when a patient has been most recently enrolled or terminated by the clinic. If the patient is currently enrolled, then the date displayed will be the Enrollment Date (<i>DE01.020</i>) from <i>Patient Demographics</i>. If the patient is currently terminated, then the date displayed will be the Enrollment Termination Date (<i>DE01.021</i>) from <i>Patient Demographics</i>. If the patient has never been enrolled, then the date will be displayed as a null or blank value.</p> <p><b>Last Visit</b> is a date representing the last time a patient was seen by the physician or another clinician within the clinic. This may be based on <i>Appointment Date/Time</i> (<i>DE15.001</i>), where appointments with status of 'No Show', 'Cancelled', or 'Deleted' are excluded, or this may be based on any additional documentation supported by the EMR to track when a patient has last been seen (e.g., encounter notes).</p> |       |       |       |       |       |       |       |       |