



CCO Primary Care Lead (HNHB LHIN)

Accuro Guide for Cancer Screening

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Please Note: All patient information contained herein is clinically fictitious data, any similarity to actual persons, living or dead, is purely coincidental.

Some patient names are those of celebrities and known characters, and again, does not reflect actual clinical data.





Getting Started

Considerations

This process becomes necessary when importing documents from hospitals who are not live on Health Report Manager (HRM). When managing or creating categories with the Documents section it is recommended the naming conventions chosen are the same (or similar) to those coming from other HRM enabled sending facilities.

Document Import

E

To import a document, select the **Documents** folder from the navigation bar in Accuro. From within this module you will have the ability to categorize imported documents (scanned or faxed) to be inserted directly into a patient's chart.

õ		
Home	📓 🔕 🖉 🔛 🖶 🖬 🖬 🖬 🚺 🚺 1/1 Pages 🚺 🔯 100% 🗸 🗸	Patient
7 Scheduler		Heath # 1234 567 887 Birtholde 1911-May-01
Traffic		Created 01/31/2018 Received MMDD//YYY Reviewed 01/31/2018
L Patients		Priority Normal From Description Indust filename
Documents	E	: Tie Document
\$ Claims		Batch Mode
EMR		Clear Clear C Open C Open C Annotate Document
讲 Wait List	C 2 v /2 C FilesLeft 2 4 E	Next Appointment: None
	Look in: Documents Custom Office Templates Custom Off	

Select the **Folder** icon as indicated above and navigate to the directory where your documents are stored. For the purpose of this exercise, the report we are importing is stored in the Documents folder.



From within the **Categorization** area marked green (below) click on the drop-down arrow and select the **Category** which applies to your document. For this example, we have chosen **Diagnostic Imaging**.

To add further information to the report, a **Sub-Category** can also be applied in the drop-down list immediately below the Category option. For this example, we have selected **Mammogram**.



Note: Categories and Sub-Categories are not (typically) setup for the clinic by default and must be created manually. The process of creating your own categories will be reviewed at the end of this workflow.

The categorization mentioned above is designed to be applied to all Diagnostic Imaging and Mammogram reports. If, however, a more detailed description of this *specific* report is required, it can be entered into the **Notes** field (above – purple).

Examples may include "dense breast tissue", "normal", or even the sending facility of this report.

Within the filing section (marked orange) select the appropriate clinician for which this document should be attached, and select either the **File Document** option which delivers the report directly to the Virtual Chart, or **Send to Provider** which sends the report to both the Virtual Chart and the clinicians Inbox for review.

Day Sheet Encounter Notes	Chronic Conditions Virtual Chart	Medications Patient Information						
Patient PTLastOne, PTOne			Letters/Forms Insks Patient Notes Generated Letters Documents		Search Patient Chart			
All 🗸	Date	∇ Created	1	Туре	SubType	Note	Provider	
All E Clinical Notes	2020-Aug-01	2020-Aug-01	@ S	Diagnostic Imaging Report	Microalbumin Ur DL<=3.0	. Microalbumin Ur DL<=3.0	Unassigned	
Forms	2018-Jan-31	2018-Jan-31		Diagnostic Imaging	Mammogram	dense breast tissue normal	Tester, Tommy	
🗄 📑 Documents	2018-Jan-30	2018-Jan-30	8	Generated Letters		Printed 2018-Jan-30 Con	Larsen, Darren	
Generated Letters	2018-Jan-30	2018-Jan-30	S	Medical Records Report	Consult Note-Psychiatrist	Principal Author: Pedlow,	Unassigned	
	2018-Jan-30	2018-Jan-30	8	Clinical Note		Consult - Final	Larsen, Darren	
Oiagnosis	2018-Jan-25	2018-Jan-25	S	Medical Records Report	Admission Note	Principal Author: Pedlow,	Unassigned	
	2018-Jan-24	2018-Jan-24	S	Diagnostic Imaging Report	RAD	Phys find Abd - 2018-Jan.	Unassigned.	

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**Post import result. From Virtual Chart.



Document Management

Document categorization is an important documentation step which aids in the filing and recall of received reports. To create your own categories, navigate to the **Documents** section of the EMR and select the **Sub-Category** drop down and select **-- Manage --**.

	Patient	
	PTLastOne, PTOne	
	Health # 1234 567 897	
	Birthdate 1911-May-01	
Category 🗕	Manage	¥
Sub-Category 🗕	Manage	~

Select the **Add** button and enter the Sub-Type name as indicated below. Click 'OK' to save the setting.

	Sub-Type Mammogram
Abcomen	Parent folders
Appointment Notification	
Dermatology	Folder
eConsult	
Head	
Heamatology	Documents
Nephrology	eConsult
Renewal	Images
	Labs
	MRI
	Pharmacy Request
Close	Referral Letter
	Ultrasound V
	OK Cancel

With the Sub-Category created we can now create and link the primary category to it. Select the Category drop-down and select -- Manage --. Enter the name for the Category (known as a Folder in this screen only), then click <u>all</u> sub-category types that you would like to link to it.

For example. If the category were to be called Diagnostic Imaging, you may also want to select *Abdomen*, *Head*, and *Mammogram*. Click 'OK' to save the settings.

			Folder	Diagnostic Imaging
СТ			Sub-Ty	pes
Documents				
eConsult				Folder
Images			v	Abcomen
Labs				Appointment Notification
MRI				Dermatology
Pharmacy Request Referral Letter			1H	eConsult
Referral Letter Ultrasound				Head
X-Rays				
x-rujo				Heamatology
			~	Mammogram
				Nephrology
	Close			Renewal
	Close			OK Cancel
OntarioMD				CCO Primary Care Lead
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Adding multiple sub-categories to a primary category will display only those select report types settings.

ie, PTOne	
1234 567 897	
1911-May-01	
c Imaging	~
	~
Normal	¥
n 🗌 Include filename	
🗈 File Document	
ommy	~
🗌 Batch Mode 🛛 💣 Options	
1 Send to Provider(s)	
<u>C</u> lear	
🛃 Open	
	1911-May-01 c Imaging



-



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Cumulative Preventive Care Reports

Accuro has a built-in report to calculate the preventive care bonuses that can be used to determine bonus achievements.

To generate the Cumulative Preventive Care Bonus report, click the Bullseye > Billing > Cumulative Preventive Care Bonus.

	File		+	Defau	t Billin	g Percer	nt						
	Sch	eduler	,	Billing Maxim									
	Too	ls		New B	ill								
	Rep	oorts		New P Calcul		ure					Ct Ctrl+A	rl+P	
	Billi	ng		Find Ir								trl+l	
	Use	rs				lumber							
	Help	þ	+	Find C Billing							Ct	rl+K	
	Bac	kup		-		ode Loo	kup						
	CDS	3		Manag	je Insu	irers							
	Con	figuration				Card Vali Preventiv	dation e Care Boni	IS					
					3								
	A	CCURO® EMR		Ē)	Ħ	2	\bowtie		G	-	,	
-	<u> </u>		-		-		U E	••	x	U			1

In the dialog box that opens, select the physician and fiscal year end for which you want the report and click 'Run'.

\$		Cumulative Preventive Care Bonus	×
Options Mappings			
Provider: Fiscal Year Ending:	Abraham, Adriane March 31, 2018 📩		
			Run Cancel

By default, the EMR tracks the QCodes/codes billed for enrolled patients to calculate the preventive bonuses as illustrated in the summary below. The codes being tracked and calculated for each of the prevention screenings can be viewed under the mapping tab. **Note**: While users can map other fields, doing so may become less manageable. Best practice is to bill appropriate QCodes/billing codes and leave mapping per EMR defaults.

Under the compliance rate,

- the patient population that falls into each screening category is listed as the denominator,
- the patients for whom the prevention is complete (identified by QCode/billing code) appears as the numerator,
- patients excluded (identified by QCode/billing code) from the prevention is subtracted from the patient population (denominator) and appears to the right of the denominator





The number of patients completed is calculated against the patient population (less exclusions) to determine the bonus percentage achieved. If the achieved percentage falls within a bonus range, the applicable 'Service Code' and 'Required Rate' will highlight.

Note: While users can adjust the numbers for completed/excluded and/or patient populations in this view, the next time the report is run, the adjusted quantities will not be remembered and be reset. Best practice to adjust for any discrepancies is to bill applicable QCodes dated within the fiscal period for which it applies.

Provider: Arispe, Esteban				🖶 Print
Category	Compliance Rate	Service Code	Required Rate	
		Q100A	60%	
	10	Q101A	65%	View Patients
Influenza Vaccine	= 11	Q102A	70%	
	95 🗘	Q103A	75%	Create Claim
		Q104A	80%	
		Q105A	60%	
Pap Smear	49	Q106A	65%	View Patients
	- 67	0% Q107A	70%	View Patients
	73 - 0 - 07	Q108A	75%	Create Claim
		Q109A	80%	
		Q110A	55%	
	21	Q111A	60%	Man Dekente
Mammography	- 45	0% Q112A	65%	View Patients
in an in a group of the	480 - 10 - 40	Q113A	70%	Create Claim
		Q114A	75%	
	- 61	Q115A	85%	
Childhood Immunizations	20 = 67	0% Q116A	90%	View Patients
childricod minicipations	30	Q117A	95%	Create Claim
		Q118A	15%	
		Q119A	20%	
	30 0	Q120A	40%	View Patients
Colorectal Cancer Screening	73 - 0 = 41	% Q121A	50%	Create Claim
	130 - 00	Q122A	60%	Greate Ciaim
		Q123A	70%	

To the right of the calculations, users can generate a report to view the patients within the selected screening category. In the report, users can sort the information by clicking on the headings (Last Name; First Name; Health #; Status).

		GIVON .	0070						
	49 🗘	Q106A	65%	View Patients					-
Pap Smear	= 67%	Q107A	70%	Land Land Land Land Land Land Land Land	Cumulat	ive Preventive	Care Patients	- Pap Smear	*
		Q108A Q109A	75% 80%	Create Claim	Last Name	First Name	Health #	Status	
		Q.ODIT			and the second se			Uncovered	1
								Covered	
								Covered	
					and the second sec			Covered	=
								Covered	-
								Covered	
								Uncovered	T
								Uncovered	1
								Uncovered	1
								Uncovered	1
								Uncovered	1
								Covered	1
								Covered	1
								Covered	1
								Covered	1
					and the second s			Uncovered	1
								Uncovered	
								Uncovered	
								Uncovered	
					Constant Section			Uncovered	1-
								Close	-
								Ciuse	*

Users can also create a claim to bill the service code of the achieved bonus rate.

		Q105A	60%		49 0 73	= 67% Message	Q107A	70% 75% 80%	
Pap Smear	49 [°] / ₂ 73 [°] / ₂ - 0 [°] / ₂ = 67%	Q106A Q107A Q108A Q109A	/0%	View Patients	 31 48	Claim created for	code: Q106A	55% 60% 65% 70%	-
	Onto			-	 CCO Prim	ary Care Lead	Q114A	75%	
	Onta)		(HNHB LF	IIN)			

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Located at the top right-hand side, a print option allows users to print a detailed or non-detailed format narrative report of the bonus summary.



Example of non-detailed report by selecting 'No' to include the details on selected patients.

Cumulat	ivo D		otivo	Ca	ro Ro	
Cumulat		eve	luve	Ua		ius
Arispe, Esteban for Fiscal Year En	ding March 31, 2	2018				
Influenza Vaccine	Covered #	Excluded #	Target Pop.	Ratio	Service Code	Req. Ratio
Reported Patients:	10		95	11%		
Detected Patients:	0		95	0%		
Pap Smear	Covered #	Excluded #	Target Pop.	Ratio	Service Code	Req. Ratio
Reported Patients:	49	0	73	67%	Q106A	65%
Detected Patients:	49	0	73	67%	Q106A	65%
Mammography	Covered #	Excluded #	Target Pop.	Ratio	Service Code	Req. Ratio
Reported Patients:	31	2	48	67%	Q112A	65%
Detected Patients:	0	1	48	0%		
Childhood Immunizations	Covered #	Excluded #	Target Pop.	Ratio	Service Code	Req. Ratio
Reported Patients:	2		3	67%		
Detected Patients:	0		3	0%		
Colorectal Cancer Screening	Covered #	Excluded #	Target Pop.	Ratio	Service Code	Req. Ratio
Reported Patients:	30	0	73	41%	Q120A	40%
Detected Patients:	0	0	73	0%		

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Downloading Queries

Users can query their EMR data to target patient populations. To access the query feature, click Bullseye > Reports > Query Builder (Alerts).

	2016-Dec-13 at	. His mother had colon cancer at age 54 The patient has had a previous his	s					
	File	Apply Insurer Payments Reports Ctri+R	1					
	Scheduler	Reports Ctrl+R Repliform CSV Export ega	ır					
	Tools	Lab Matching Reconciliation Report						
	Reports	Outstanding Requisitions, Referrals and Orders Open Requisition Forms	1					
	Billing	Query Builder (Alerts) ad	t					
	Users	nor	m					
	Help		I					
	Backup		1					
	CDS		I					
8=	Configuration		I					
			I					
			I					
	ACCURO®	🛗 📓 🔤 🔚 C 🛃 ,						
-	EMR		I					
_			J					

Accuro maintains an online repository, sometimes referred to as 'the Cloud' or 'Alert Publisher', consisting of queries that users have published/uploaded for sharing.

From the alert definitions window, users can access Accuro's online repository in order to search and/or publish queries by clicking on the 'Alert Publisher' option at the bottom right as highlighted below.

\$	Alert Definitions
Existing Definitions	Alert Definitions
Filter Visible Definitions	Current Rules
Filter Visible Definitions A1C \u03c8 ACtwe Patients \u03c8 AFHTO Diabetes Frontend \u03c8 AFHTO Opioids and Benzo \u03c8 AFHTO Opioids Frontend S \u03c8 BCG \u03c8 CDM Diabetes-SWEP \u03c8 Childhood Immunization Re \u03c8 Copy of Master OMD DM P \u03c8 Copy of Master OMD DM P \u03c8 Copy of SurgHx - Extract \u03c8 Customer smokers billed E \u03c8 D2D - Diabetes \u03c8 D2D - Discharge Follow-up \u03c8 D2D - Rostered Patients \u03c8 Demo Query	Current Rules
No Alert Definition Loaded	Run Comparison Run Repo

In the alert definition publisher window, users can simply click the search magnifying glass to view all published alerts. Alternatively, users can enter a keyword and/or publisher to filter their results.



To download a published alert, click on the desired alert > click 'Download Alert' at the bottom right > click 'OK'.

¢	Alert	Definition Pul	olisher	x
Download Alert	s Publish Ale	rts		
Search mar PublisherAl	nmogram			
Alert	Description	Date	Publisher	Keywords
emily test	Mammogra	2016-Nov-10		ASAP
mammogram	TEST	2014-May-23		Test
Mammogra		2015-Feb-26		
Mammogra Mammogra		2015-Feb-26 2015-Feb-26		
PIN PREV		2013-Peb-26 2011-Apr-13		
			Do	ownload Alert

.		Alert	Definition Pul	blisher	x
Download	Alerts	Publish Ale	rts		
Search	mam	nogram			
Search	mann	nogram			
Publisher	All-				~ Q
Alert	1	Description	Date	Publisher	Keywords
emily test		lammogra	2016-Nov-10	CWCPCN	ASAP
mammog		EST	2014-May-23		Test
Mammog			2015-Feb-26		
Mammog			2015-Feb-26	Adam Sinai	
Mammogi PIN PREV			Message	×	
		Aler	t downloaded s	successfully.	
				Do	ownload Alert

The published alert will now appear in your alert definition list. Click to highlight the downloaded alert > click 'Run Report' at the bottom right.

\$	Ale	t Definitions	×
Existing Definitions	Mammogram - exclusion codes		
Filter Visible Definitions	Current Rules		
gfd 🏫 ^	Surgical/Medical History History Contain	s 'Mastectomy']
HRM - MD Check	Bill Procedure Code = 'Q141'		
HRM Demo			
HRM VAlidation 🚖	0 ⁰		1
JL Prescription Search	New Rule	Manage Rule	۱L
k030 🊖	Rule Category Demographics V	None Add Rule Remove Rule	
k030mel		Doesn't Match Patient Records Only Optional Instances	
LMC test	Address		
Mammogram - exclusion c 😭	Carecard City		
Mammogram - exclusion c	Deceased		
Master OMD Active patient	Default Insurer		
Master OMD Active patient 🚖	Email Address		
Master OMD current smok 🏫	Employer Enrolled Date		
Master OMD current smok 🏫	Enrolled Date		
Master OMD Current Smok 🚖 Master OMD Current Smok 🚖	Family Phys.	Create or Select a Rule to Manage	
Master OMD Current Smok	File Number	oreate or object a real to manage	
Master OMD Current Smok	Flags		
Master OMD Dm Patients 😭	Global Message Next of Kin		
Master OMD DM Patients 😭	Occupation		
Master OMD DM Patients 🏫	Office Provider		
Master OMD DM Patients 🏫	Official Language		
Master OMD DM Patients 🚖 Master OMD DM Patients 🚖	Paper Chart v		
]
Last Report Ran: Never		Provide the second se	



Click 'All Patients' or Selected Providers' Patients' and highlight the applicable physician(s) > right-click or double-click to include or exclude 'Fields to Display' > click 'Run'.

Current Ru	ies		Chervo	100		
Surgical/	Check for Alert Matches	×	gical/ Proc	Check for Alert	t Matches	
New RU Rule Ca Address Carecar City Deceass Default Email Ac Employe Enrolled Family F File Nun Filags	Mammogram - exclusion codes Apply Against ● All Patients ● All Patients ● Selected Providers' Patients ● Physician Abraham, Adriane Arayette, Adam Banner, Lisa Broiln, Brandon Cantu, Bernita Ciatardoni, Tuyet Colgate, Dawna Counts, Ronny Cruz, Christian V	Iude Field Optic	y e Ca dress recar y ceas fault auit A iploye rolled rolled mity F s Nun igs		ields to Display Surgical / Medical History History History Date Resolved Date History Note History Vote History Detate	nly Opt
Global N Next of I Occupa Office P Official I Paper Ch	Match Types to View Unassigned Assigned Completed Run Cance		obal N xt of I cupa îce P îcial I per Ch	Match Types to View I Unassigned Assignant	ned Completed	

In the results, users can select individual patients by clicking on a single row. Holding the shift key while clicking rows allows users to select multiple rows one at a time.

>					Alert M					
					Mammogram - e	exclusion code	35			
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	History	Negative History	History Note	History Details
				F	(_)	Unassigned	Mastectomy	False		
				F	(000) 000-0000	Unassigned	Mastectomy	False	Double	
				F	(905) 788-1942	Unassigned	Mastectomy	False		
	3	Matches -	Select Action -		 Complete 	d Rerun	Print All	Export C	lose	L8

Clicking the first patient you wish to select and holding the control key when clicking the row at the bottom of the patients you wish to select will highlight the group.

Clicking on a single row in the list and hitting the control key and A simultaneously will highlight all the results in the list.

.ast Name	First Name	PHN	Birthdate		ogram - exclusion Home Phone	Status	History	History Note	History Details
				F	(Unassigned	Mastectomy		
				F	(000) 000-0000	Unassigned	Mastectomy	Double	
				F	(905) 788-1942	Unassigned	Mastectomy		

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Various actions can be applied to all or select patients by highlighting them in the list of results and applying an action as illustrated below.

				Home	oaram	exclusion	n oodoo			
		1.51757	1000 - 100				Concernance of the second	1122555	100000 - 00000	
Last Name F	First Name	PHN	Birthdate	Sex	Home F	Phone	Status	History	History Note	History Details
				F	()_	-	Unassigned	Mastectomy		
				F	(000) 0	00-000	Unassigned	Mastectomy	Double	
				F	(905) 7	88-1942	Unassigned	Mastectomy		
	3 Matches				Complete	ed F	Rerun Pri	nt All Exp	ort Close	
	3 Matches				Complete	ed F	Rerun Pri	nt All Exp	ort Close	
	3 Matches	- Select Action		• ^	Complete	ed F	Rerun Pri	nt All Exp	ort Close	
	3 Matches	- Select Action Create Task			Complete	ed F	Rerun Prin	nt All Exp	ort Close	
	3 Matches	- Select Action Create Task Apply Vaccine			Complete	ed F	Rerun Prin	nt All Exp	ort Close	
	3 Matches	- Select Action Create Task Apply Vaccine Create Notes		^	Complete	ed F	Rerun Prii	nt All Exp	Close	
	3 Matches	- Select Action Create Task Apply Vaccine Create Notes Create Forms		^	Complete	ed F	Rerun Prii	nt All Exp	Close	
	3 Matches	- Select Action Create Task Apply Vaccine Create Notes	- 6	^	Complete	ed F	Rerun Pri	nt All Exp	Close	



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Creating Custom Queries

Users can define their own alert definitions to query their EMR data.

To access the query feature, click Bullseye > Reports > Query Builder (Alerts).



To create a new query, in the Alerts Definition window, click the green + in the bottom left > name the query > click 'OK'.

\$		Alert Definitio
Existing Definitions	Alert Definitions	
Filter Visible Definitions	Current Rules	
	Email Address Employer Enrolled Date Enrolled Provider Family Phys. Elle Number X e new Alert Definition:	 Manag -None- Doet
No Alert Definition Loaded		



The newly name query will now appear in the 'Existing Definitions' list on the left-hand side and will be in focus (highlighted blue). To the right, users can define the parameters of their query by adding rules.

\$	Alert Definitions
New Rule Rule Category Demographics V	nd 2018-Jan-31 <i>AND</i> Vaccine/Immunization = Inf Manage Rule None Doesn't Match Patient Records Only 0

Illustrated in the series of steps below, we will create an Influenza search. The first rule is that the patients must be active.

To the right of the words 'Rule Category' in the 'New Rule' section, click the down-arrow and select 'Demographics' > under 'Rule Category' click 'Patient Status' > in the 'Manage Rule' section to the right, click 'New' > click the drop-arrow in the status field and select 'Equals' > click the drop-arrow in the blank field next to 'Equals' and select 'Active' > click 'Add Rule' in the top right of the 'Manage Rule' section.

	o °	
<u>-</u>	New Rule	Manage Rule
	Rule Category Demographics V	Patient Status Add Rule Remove Rule
	Patient Alias ^ Patient Cohorts ^ Patient Name ^ Patient Status ^ Patient Status History ^ Patient Suffix ^ Pharmacy ^ Phone Number ^ Postal Code ^ Primary Care ^ Portione Date ^	□ Doesn't Match □ Patient Records Only □ Optional Instances 1 -
	Referral Date	
	New Rule	Manage Rule Patient Status Add Rule Remove Rule
	Patient Alias ^ Patient Cohorts Patient Name Patient Status	Doesn't Match Patient Records Only Optional Instances 1
	Patient Status History Patient Suffix Pharmacy Phone Number Postal Code Primary Care	Status: Equals V Active V
	Province or State Referral Date Referral Date	New



With 'Demographics' still selected in the 'New Rule' section, under 'Rule Category' click 'Enrolled Provider' > in the 'Manage Rule' section to the right, click 'New' > use the magnifying glass to search for the provider in the 'provider search' window that will open, highlight the provider in the search results and click select > click 'Add Rule' in the top right of the 'Manage Rule' section.

* ₹ ₹	¢°			
2	New Rule			Manage Rule
2	Rule Category	Demographics v		Enrolled Provider Add Rule Remove Rule
1	Address	^		Doesn't Match Patient Records Only Optional Instances 1
2	Carecard		111	
7	City			
7	Deceased			
7	Default Insurer	=		
7	Email Address	-		
2	Employer			
2	Enrolled Date			
2	Enrolled Provider			Enrolled Provider: Banner, Lisa
3	Family Phys.			
3	File Number			New
5	Flags			
5	Global Message			

With 'Demographics' still selected in the 'New Rule' section, under 'Rule Category' click 'Patient Age' > in the 'Manage Rule' section to the right, click the drop-arrow in the 'Age' field and adjust the age parameters accordingly > click 'Add Rule' in the top right of the 'Manage Rule' section.

	¢°	
☆	New Rule	Manage Rule
	Rule Category Demographics V	Patient Age Update Rule Remove Rule
	Global Message	Doesn't Match Patient Records Only Optional Instances 1
	Occupation	
	Office Provider	
	Official Language	
☆ ☆	Paper Chart Patient Age	
	Patient Alias	
	Patient Cohorts	Age: Older Than 🗸 64 🗘 Years 11 🗘 Months 😣
☆	Patient Name	
☆	Patient Status	New
	Patient Status History Patient Suffix	
☆ =	Pharmacy	
	Phone Number	
	Postal Code	
	Primarv Care	



To the right of the words 'Rule Category' in the 'New Rule' section, click the down-arrow and select 'Immunizations' > under 'Rule Category' click 'Immunizations' > in the 'Manage Rule' section to the right, click 'New' > click 'Vaccine/Immunization' > begin typing influenza in the vaccine/immunization field, select the immunization from the search results > click 'Add Rule' in the top right of the 'Manage Rule' section.







We want to know who has **NOT** had the influenza vaccine, so with the influenza rule under the 'Current Rules' section selected (evidenced by it being highlighted in blue), in the 'Manage Rule' section, click 'Doesn't Match' and click 'Update Rule'.

When 'Doesn't Match' is applied, the rule will display in red/pink and indicates that the query will produce results opposite to how the rule reads.

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Existing Definitions	PCB - Influenza	
Filter Visible Definitions	Current Rules	
OMD Prev Care Regular se 😭 🔺	Enrolled Provider = 'Arispe, Esteban'	^
OMD1 - All Patients 🏫	Age Older Than 64 Years 11 Months	
Opiod 🏫		-01 and 2018-Jan-31 AND Vaccine/Immunization = Influenza
Pap not done in last year 🔹	00	
PCB - FOBT		
PCB - Influenza 🏫	New Rule	Manage Rule
PCB - Mammo 🏫	Rule Category Immunizations ~	Immunizations Update Rule Remove Rule
PCB - Pap	initial category	
PEFHT Delinquent Patients 1	Immunizations	Doesn't Match Patient Records Only Optional Instances
PIN Prevention Influenza		
prob 🚖 Pt/appt types-MB-OMD 🚖		
query 😭		
Rostered Patients		
Sanofi- HeFH		
Summerville FHT - Demo		
Summerville FHT - Demo (2 😭		
Summerville FHT - Demo 3 😭		
SurgHx - Extract		10/01/2017
TEST 😭		Date Administered: Between
test2 🚖		01/31/2016
testing this 🚖 🚍		Vaccine/Immunization: Influenza
tet 🚖		
TP - Temp 🏫		O New
Unbilled patients 2		
		Overdue Vaccinations
		Exclude Optional Vaccinations
		111
*		Alert beanitions
Exist	ing Definitions	PCB - Influenza
and the second se		
Fibe	r Visible Definitions	Current Rules
	A	Status = 'Active'
		Enrolled Brouider = 'Astron Esteban'

<u>(</u>	Status = 'Active' Enrolled Provider = 'Arispe, Esteban' Age Older Than 64 Years 11 Months Date Administered Between 2017-Oct-01 and 2018-3	an 31 AND Vaccine/Immunization = Influenza	
	New Rule Rule Category Demographics	Manage Rule	Add Rule Remove Rule
CB Jobecca 🔹 🕸	Address ^ Carecard City Deceased Default insurer Email Address II	Doesn't Match Patient Records Only	Optional Instances

Upon completion of building the criteria for the influenza search, click 'Run Report' in the bottom right of the window.

Ontario MD	CCO Primary Care Lead (HNHB LHIN)
ser3	Run Comparison Run Report Close
cupation fice Provider ficial Language per Chart tient Age	
obal Message xt of Kin	
195	

Hamilton Family Health Team

e care, together

Click 'All Patients' or 'Selected Providers' Patients' and highlight the applicable physician(s) > right-click or double-click to include or exclude 'Fields to Display' > click 'Run'.

PCB	- Influenza	A	- +	Check for	r Alert Matches	
Apply Against O All Patients Selected Providers' Patients	Fields to Display Patient Status Finoled Provider Finoled Provider Finoled Provider Last Name	0		Against Patients	- Influenza Fields to Display Repatient Status Patient Status	Add Rule Optional Ir
Apriysician Abraham, Adriane Arispe, Esteban Arispe, Esteban Arispe, Esteban Banner, Lisa Boca, Brianna Brolin, Brandon Cantu, Bernita Ciafardoni, Tuyet Colgate, Dawna Counts, Ronny Cruz, Christian Cuttino, Kira.	Patient Age	54	City - Sec - Aptrain Des Aptrain Em Artupe Em Artupe Em Bann Enr Boa, Far Broin File Clafa Gio Colga Gio Colga Col	ected Providers' Patients yskian am, Adriane psi, Esteban Et, Esteban Etranan Brandon Brandon Brandon Brandon Brandon Brandon Christian Ativa Christian Ativa Christian	Enrolled Provider Enrolled Provider Enrolled Provider Last Name Enrolled Provider First Name Patient Age Ginndate	o Manage
tch Types to View	Assigned Completed		Par Pat	Unassigned	Assigned Completed	1

In the results, users can select individual patients by clicking on a single row. Holding the shift key while clicking rows allows users to select multiple rows one at a time. Clicking the first patient you wish to select and holding the control key when clicking the row at the bottom of the patients you wish to select will highlight the group. Clicking on a single row in the list and hitting the control key and A simultaneously will highlight all the results in the list.

٠						Alert M	latches		
						PCB - In	fluenza		
Last Name	First Name	PHN	Birthdate	Sex	Hom	e Phone	Status	Patient Status	Enrolled Provider Last Nam
				F	1		Unassigned	Active	Arispe
				F	(-	Unassigned	Active	Arispe
				M	()		Unassigned	Active	Anspe
				M	()	-	Unassigned	Active	Arispe
				F		-	Unassigned	Active	Arispe
				M	<u> </u>	-	Unassigned	Active	Arispe
				M	1	-	Unassigned	Active	Альре
				M	-	-	Unassigned	Active	Arispe
				M			Unassigned	Active	Arispe
				M	<u> </u>		Unassigned	Active	Anspe
				F.	(-	Unassigned	Active	Arispe
				M	(- 1	Unassigned	Active	Arispe
				F	0		Unassigned	Active	Arispe
				M	<u> </u>	1.01-4	Unassigned	Active	Arispe
				M	(Unassigned	Active	Anspe
				M	0		Unassigned	Active	Anspe
				M	(Unassigned	Active	Anspe
				M	1		Unassigned	Active	Arispe
				F	(Unassigned	Active	Anspe
				M	<u> </u>		Unassigned	Active	Anspe
	50	Matches	Select Action -		-	Complete	d Rerun	Print All	Export Close

ŧ					Alert M	latches		
					PCB - In	fluenza		
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Status	Enrolled Provider Last Nam
				1	<u> </u>	Unassigned	Active	Anspe
				Ŧ	<u></u>	Unassigned	Active	Arape
				M	()	Unassigned	Active	Arispe
				M	<u>()</u>	Unassigned	Active	Arispe
				F	(_)	Unassigned	Active	Arispe
				M	()	Unassigned	Active	Arispe
				M	(_)	Unassigned	Active	Arispe
				M	(_)	Unassigned	Active	Anspe
				M	(_)	Unassigned	Active	Anspe
				M	(_)	Unassigned	Active	Anspe
				Ŧ.,	() -	Unassigned	Active	Anspe
				M	(_)	Unassigned	Active	Arispe
				F	<u> </u>	Unassigned	Active	Arispe
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				M	<u></u>	Unassigned	Active	Anspe
				M	()	Unassigned	Active	Anspe
				M	<u></u>	Unassigned	Active	Anspe
				M	<u> </u>	Unassigned	Activo	Arispe
				F.S	<u></u>	Unassigned	Active	Anspe
	-	_		M	<u></u>	Unassigned	Active	Anspe
	54	Matches	elect Action -	-	- Complete	d Rerun	Print Al	Export Close





Various actions can be applied to all or select patients by highlighting them in the list of results and applying an action such as creating tasks, bills, statuses, flags, cohorts and more for selected patients.

*					Alert M	latches		
					PCB - In	fluenza		
Last Name	First Name PHN	Birthdate	Sex	Hom	e Phone	Status	Patient Status	Enrolled Provider Last Name
			F	0)	Unassigned	Active	Arispe
			F	()	Unassigned	Active	Arispe
			M	()	Unassigned	Active	Arispe
			M	()	Unassigned	Active	Arispe
			F	0)	Unassigned	Active	Arispe
			M	()	Unassigned	Active	Arispe
			M	(Unassigned	Active	Arispe
			M	())(Unassigned	Active	Arispe
			M	0)	Unassigned	Active	Arispe
			M	()	Unassigned	Active	Arispe
			F	(Unassigned	Active	Arispe
			M	()	Unassigned	Active	Arispe
			F	<u> </u>)	Unassigned	Active	Arispe
			M	_)(Unassigned	Active	Arispe
			M	()	Unassigned	Active	Arispe
			M	()	Unassigned	Active	Anspe
			M	\mathbf{C})(Unassigned	Active	Anspe
			M	0)	Unassigned	Active	Arispe
			F	()	Unassigned	Active	Arispe
			M	(Unassigned	Active	Arispe
	50 Matches	- Select Action -		~	Complete	Rerun	Print All	Export Close
	. v	- Select Action -		^				
	2.12	Create Task	R					
	.065 0.067. 8. 7.7	Apply Vaccine	20					
		Create Notes		=				
		Create Forms						
		Create Bill						



Creating & Assigning to Cohorts

Users may wish to create a patient cohort listing the patients due for an influenza vaccine to have an office member action.

To create a patient cohort for the list of patients generated by a query, select all or some of the patients in the list, click the 'Select Action' drop-arrow > click 'Create Patient Cohort'.

ł					Alert M	latches				x
					PCB - In	fluenza				
ast Name	First Name PHN	Birthdate	Sex	Hon	ne Phone	Status	Patient Status	Enrolled Provider Last Name	Birthdate	
	Contraction of the local division of the loc	F	F	0)	Unassigned	Active	Arispe	02/23/1945	I
		F	F)	Unassigned	Active	Arispe	10/02/1952	
		٨	M)	Unassigned	Active	Arispe	05/02/1940	
		A	M) -	Unassigned	Active	Arispe	05/28/1919	
		F	F) -/	Unassigned	Active	Arispe	12/25/1921	
		٨	M) -	Unassigned	Active	Arispe	06/08/1935	
		N	M	()	Unassigned	Active	Arispe	09/21/1929	
		A	M	() _	Unassigned	Active	Arispe	11/23/1922	
		Ν	M	()	Unassigned	Active	Arispe	09/01/1933	
		٨	M)	Unassigned	Active	Arispe	10/31/1926	
		F	F) -	Unassigned	Active	Arispe	04/27/1920	
		٨	M) -	Unassigned	Active	Arispe	12/07/1927	
		F	F	() -	Unassigned	Active	Arispe	11/13/1952	
		٨	M	() -	Unassigned	Active	Arispe	11/24/1937	
		N	M	() -	Unassigned	Active	Arispe	03/06/1926	
		٨	M	()	Unassigned	Active	Arispe	04/30/1931	
		٨	M	()	Unassigned	Active	Arispe	09/30/1950	
		٨	M	() -	Unassigned	Active	Arispe	11/13/1918	
		F	F	() -	Unassigned	Active	Arispe	10/07/1943	
		A	M	()	Unassigned	Active	Arispe	01/14/1924	
	50 Matches	- Select Action -		~	Complete	d Rerun	Print All	Export Close		
		Apply Vaccine Create Notes Create Forms Create Bill Set Patient Status Assign Flag Assign to Patient Cot	hort							

Select the provider to whom the cohort belongs and name the cohort.

>					Alert M	atches			
					PCB - Inf	luenza			
Last Name	First Name	PHN	Birthdate	Sex	Home Phone	Status	Patient Status	Enrolled Provider Last Name	Birthdate
				F	(_)	Unassigned	Active	Arispe	02/23/1945
				F	(_)	Unassigned	Active	Arispe	10/02/1952
				M	(_)	Unassigned	Active	Arispe	05/02/1940
				M	(_)	Unassigned	Active	Arispe	05/28/1919
				F		Unassigned	Active	Arispe	12/25/1921
					().	Insectored	Active	Arispe	06/08/1935
					Create Patie	ent Cohort		spe	09/21/1929
					-			spe	11/23/1922
			Pro Pro	vider	Arispe, Ester	ban		spe	09/01/1933
			Col	hort Na	ne Pts to call for	flu shot		spe	10/31/1926
						1		spe	04/27/1920
					OK	Cancel		spe	12/07/1927
				-				spe	11/13/1952
				М	()	Unassigned	Active	Arispe	11/24/1937
				M	<u> </u>	Unassigned	Active	Arispe	03/06/1926
				М		Unassigned	Active	Arispe	04/30/1931
				М	(_)	Unassigned	Active	Arispe	09/30/1950
				M	(_)	Unassigned	Active	Arispe	11/13/1918
				F	()	Unassigned	Active	Arispe	10/07/1943
				M	() -	Unassigned	Active	Arispe	01/14/1924



Hamilton Family Health Team





Managing Cohorts

Users access cohorts through the EMR patient module. To manage cohorts, click the 'Manage Cohorts' function at the bottom left of the patient view > select physician from the provider drop-arrow > select desired cohort and names of patients currently in the cohort displays below. As appropriate, patients can be added and removed from the cohort.

Accuro CMS4 2017.01 - *** Ontario MD Testing Environment ***	×
9 📀 🔮 🛱 Patient: Middleton, Kate 1973-Jun-21 (44 Yr male) 5555 555 555 KC (905) 788-1492 Enrolled	Toronto Office
Alergy:	OMD User 3
Last Na Middleton Health # Search Ony	
First Name Kate 🛃 Identifier Search Only	
Middle Name Elizabeth Birthdate MM/DD/YYYY 🕵 🚳	
Title: Mr. v Suffic v Patient Status: Active v Office Provider: Arispe, Esteban	
Demographics Other Relationships Notes Status History Private Billing Insurer Rules Provider Enrolment History	
	^
Health # 1 Hostift	
Birthdate 06/21/1973 44 Yr Gender M - Deceased MM/DD/YYY	
Family Phys Arispe, Esteban Referring PhysNone	
Address 1 Palace Way, Apt 101 Note	
City London ON. Canada v Postalizip NOL 2N2 Type Residence v	
Phone #s: Home (905) 788-1492 Work (000) 000-0000 Cell (000) 000-0000 Fax (000) 000-0000 Preferred Contact Method v	
Email Address kate petergontariomd com Check for Duplicates	=
O Default Insurer OHP v	
Pharmacy Contact -None-	
Primary Care	
Last Updated: 2018-Jan-23 by OMD User 1 (Toronto Office)	
22 22 2334 Admission Date MM/DD/YYYY Discharge Date MM/DD/YYYY Master Number [0] None ✓	
	Enroliment
A 3 Manage Cohorts, Delete Patient Patient Relationships Merge Update Patient Clear (F1)	
♦	

1

		Manage Patient Co	
Provider	Arispe, Estebar	1	v
Cohorts			
DM (1)			2
	est 18+ (533)		
Pts to c	all for flu shot (50)		
0	Ø		
	of Cohort		
Patient	Name	Birthdate	Health #
1			
0	0		
	0		OK Cancel
-0	0		OK Cancel
ispe, Estel			OK Cancel
		s Delete Patient	OK Cancel Patient Relationships Merg

	Manage Patient Co	ohorts 📃 🗖 🗖
Provider Arispe	, Esteban	
Cohorts		
DM (1)	tana tan	
Tony Test 18+ (
Pts to call for flu	shot (49)	
sta		
0 / 0		
Ca Patients of Coho		
r Patient Name	Birthdate	Health #
er en		
Water Table	16200002	Mar
00		
ge		OK Cance



CCO Primary Care Lead (HNHB LHIN)

(44 Yr male) 5555 555 555KC (905) 788-1492 Enrolled

Tracking

Accuro has built-in tracking functionality that identifies outstanding preventive care.

If 'Tracking' is not enabled in your EMR, in the bottom left of the encounter notes section of a patient chart, you will only see only the word 'Tracking' with a cogwheel icon next to the 'Tracking' function.

To enable tracking, click on the cogwheel icons to the right of the word 'Tracking'.



In the 'Tracking options' window that opens, click 'Enable Tracking' > once tracking is enabled, any tracking categories listed will be active however if no tracking categories are listed, click the green +, select the categories to track and click 'Add' > click 'OK'.





As illustrated in the following examples, the tracking functionality reports that this patient is due on 3 preventive care as the associated mapped QCodes/billing codes are not detected.

Clicking on the magnifying glass next to the item(s) in the tracking section lists the items the patients shows as overdue.

Patient Middleton K	ate 1960-Jun-21 (57 Yr female) 5555 555 555KC (905) 788-1492 Enrolled			1	Toronte
Allergy:				A	OM
Day Sheet Encounter Not	Chronic Conditions Virtual Chart Medications Patient Information				
Patient 🛛 Middleton, Kate	 57 years old female 	FilterAll Items v Pr	rovidersAll		
Future	NYGH - Medical Imaging	▼ ○ ■	S 14 1	0 🖶	
2018-Oct-17 at 8:45am	Notes		A		
Fibromyalgia B Cantu	2017-Nov-21: Letter	6	Lifestyle		
0	Provider: Larsen, Darren		2016-Aug-10 Dil Marital Status (A		
Past	Please see Kate, a 44 year old for Relevant findings and investigations an regarding the care of Kate. Problem History: ESSENTIAL HYPERTENSIC	e attached. Please do not hesitate to contact me if you have any questions IN OSTEOPOROSIS. ASTHMA. DIABETES MELLITUS	Family History		
2017-Jul-20 at 8:10am	Surgical/Medical	IN, USTEOPOROSIS, ASTRIMA, DIADETES MELLITUS			
CPX	2017-Nov-21 Referral Letter	c	None Recorded		
E Arispe	Provider: Larsen, Darren		Risk Factors		
250	Please see Kate, a 44 year old for Relevant findings and investigations an	e attached. Please do not hesitate to contact me if you have any questions	2016-Aug-10 D	lated Eye Exam	0
2017-Feb-13 at 12:00pm		IN, OSTEOPOROSIS, ASTHMA, DIABETES MELLITUS	Marital Status [1	
CPX	Surgical/Medical		None Recorded		
G Farra	2017-Nov-06: Clinical Note	C C	Alerts		
	Provider: Larsen, Parren Email Message H Kate - the results from your last mammo was normal. See	you in a counte of years. Thanks, Dr. Y	None Recorded		
2017-Feb-13 at 11:45am CPX	2017-Nov-06: Communications	you in a couple of years. Thanks Dr. A.			
G Farra	Provider Larsen, Darren		None Recorded		
0	Email Message. Hi Kate - the results from your last mammo was normal. See	you in a couple of years. Thanks. Dr. X.	Personal Histo		_
2017-Jan-30 at 1:45pm	2017-Oct-24: Clinical Note	6			
Follow Up, 4/12 RX Refill	Provider: Larsen, Darren		[Hx Type]: Prevent (Description): FOB		liar);
G Farra	eConsult Message: Please see this patient for		[Hx Category]: Pre	the second s	ackin
0	Labs	Q NI 🚎 O 🥒 By Results	[Tracking Type]: F		a starting
		🔍 🕅 🚮 🗿 🧪 By Results	2017-01-19; [State	e]: Active	
	A1C 0.067 8 7.7 BP - Diastolic 8 8		[Type]: Patient Not		er8
Tracking of	BP - Systolic 12 12		; [From]: OMDUser ; [Written On]: 201		
0) Labs	HbA1C 0.065.0.067.8.7.7 HbA1C 0.065		; [Subject]: Roomin		
0) Referrals and Orders	HbA1C 0.065		; [Note]: When Kat		Iding
2) CDM Q			front desk staff will		
			not to draw attention	on that they atte	nd th
3) Preventive Care			clinic		

Tracking	00	
(0) Labs		
(0) Referrals and Orde	ers	
(2) CDM	Q	
(3) Preventive Care	Q	

	0	Provider: Larsen, Darren
	2017-Feb-13 at 11:45am CPX G Farra 0	Outstanding Cumulative Preventive Care This patient meets the criteria for the following Cumulative Preventive Care items which are outstanding. To complete the Cumulative Preventive Care items, bill the appropriate Tracking Q Code.
E	2017-Jan-30 at 1:45pm Follow Up, 4/12 RX Refill G Farra 0	Alternatively, mappings can be configured in Billing -> Cumulative Preventive Care Bonus. Pap Smear Mammography Colorectal Cancer Screening
22	(0) Labs	
2834	(0) Referrals and Orders	
82	(2) CDM Q	
3	(3) Preventive Care	
		12



EMR Medical History Bands

The medical history bands native to Accuro EMR are appropriate to record patient's medical and cancer/prevention screening information. Additionally, related cancer/prevention medical reports should be labeled appropriately in order to easily filter for and identify within the patients virtual chart.

<u>م</u>		
Q ^	History of Problems) 🧷 🔨
	2010-Jan-06 GENETIC SUSCEPTIBILITY T MALIGNANT NEOPLASM OF BREAST High Risk	0
	Surgical/Medical History	0
	2012-Jan-30 Mastectomy [Double]	
	Family History	0
	Diabetes (Brother)	
	Lifestyle	0
	2017-Mar-30 Smoking Status: Smoker	
	Risk Factors	0
	None Recorded	

Some physcians have elected to create a custom band to appear within the patient's encounter notes specific for managing Preventive Care.

Note: Custom bands are clinic wide and cannot be deleted once implemented and used and only specific types of bands can be queryied. If a custom band is desired, please contact EMR vendor in advance to discuss considerations and to ensure proper setup.

\$	Preventative Care (regular)	
History]
11	Screening Excluded	
	⇒ scopy	
Flu Sh FOBT	ot	
	ectomy ~	
Details	~	1
Note		
Date	MM/DD/YYYY	
End Date	MM/DD/YYYY	
Life Stage	~	
	Negative	
Delete	Save and New Save and Close Cancel	

Preventat	ive Care (regular)	0
2014-Feb-15	FOBT	
2012-Jan-30	Breast Screening Excluded	
		A A A

