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Accuro Guide for Cancer Screening

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

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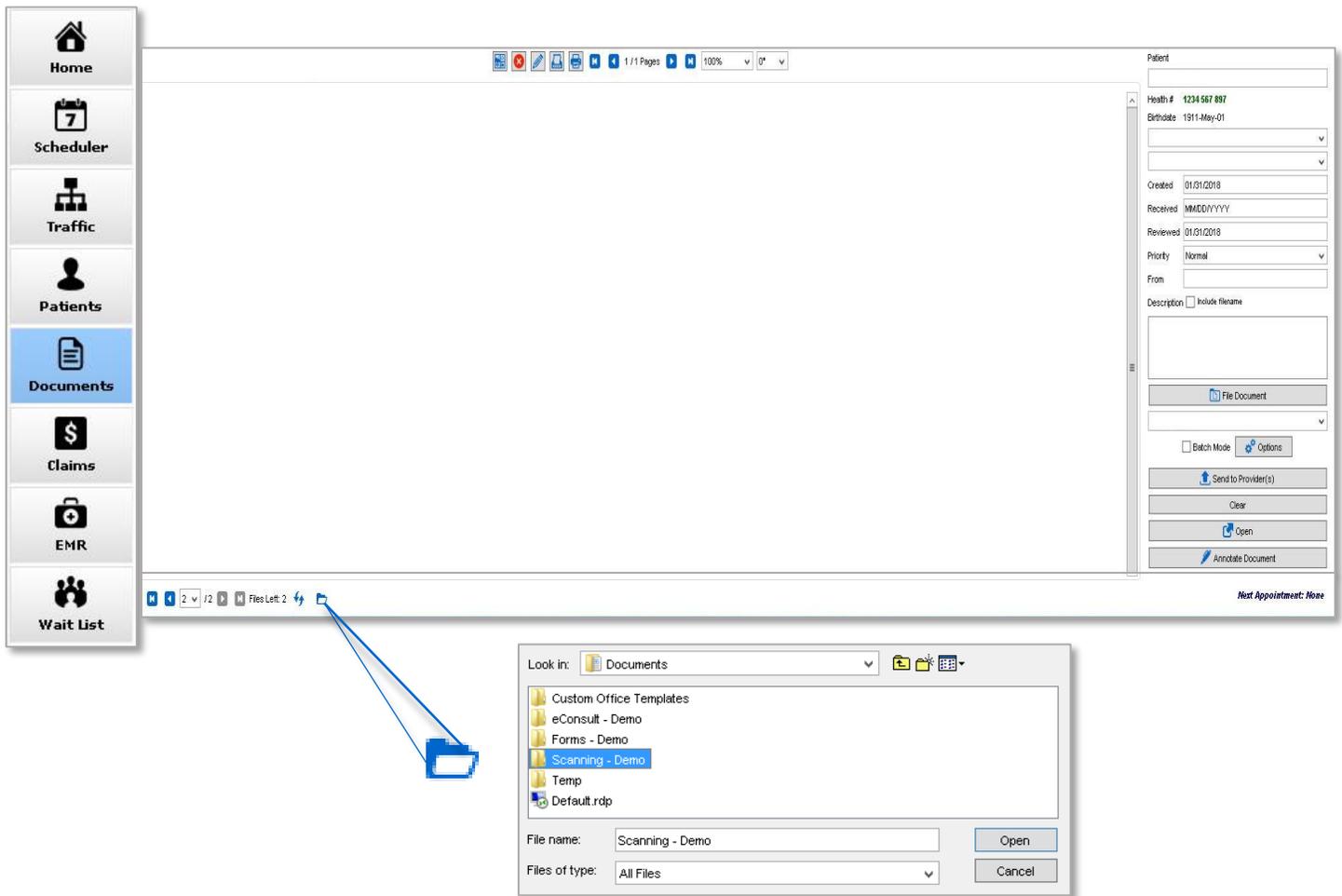
Select the **Folder** icon as indicated above and navigate to the directory where your documents are stored. For the purpose of this exercise, the report we are importing is stored in the Documents folder.

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.

**Post import result. From Virtual Chart.

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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-- ⌄ |

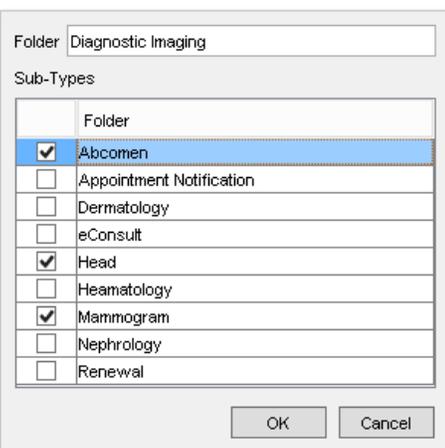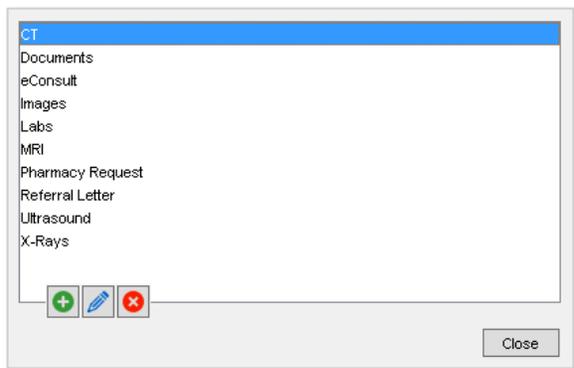Sub-Category   ➡ | --Manage-- ⌄ |

Select the **Add** button and enter the Sub-Type name as indicated below. Click 'OK' to save the setting.
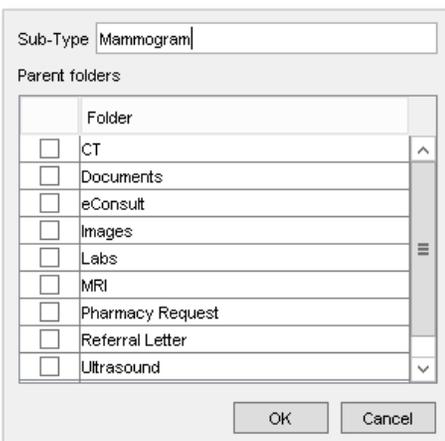
With the Sub-Category created we can now create and link the primary category to it. Select the Category drop-down and select -- Manage --.   Enter the name for the Category (known as a Folder in this screen only), then click all sub-category types that you would like to link to it.

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.

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Adding multiple sub-categories to a primary category will display only those select report types settings.

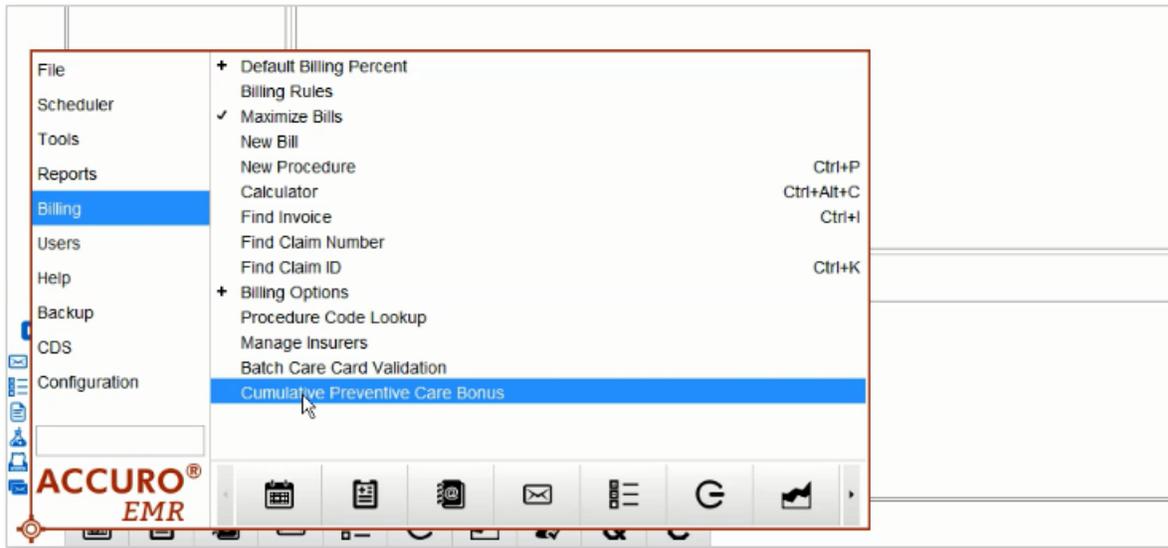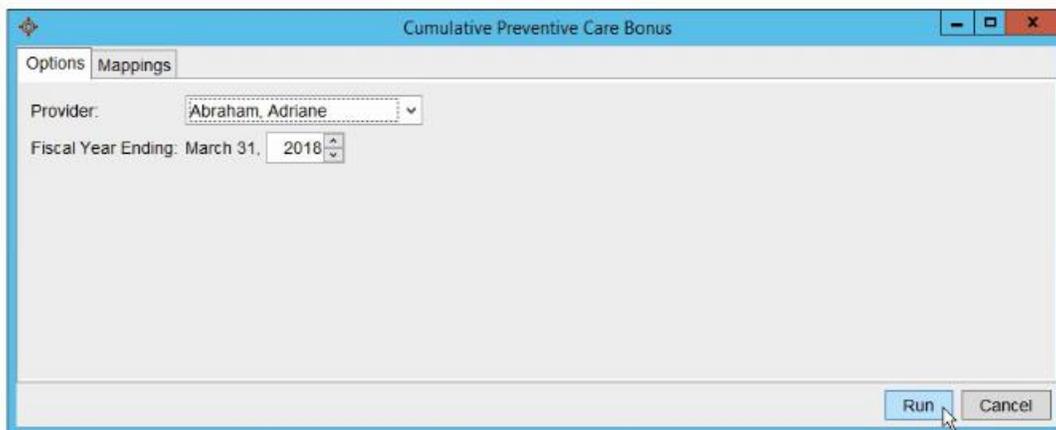| Patient |
| PTLastOne, PTOne |
| Health # **1234 567 897** |
| Birthdate 1911-May-01 |
| Diagnostic Imaging ⌄ |
| ⌄ |
| --Manage-- |
| |
| Abcomen |
| Head |
| Mammogram |
| Priority Normal ⌄ |
| From |
| Description ☐ Include filename |
| |
| 🗋 File Document |
| Tester, Tommy ⌄ |
| ☐ Batch Mode ⚙ Options |
| ⬆ Send to Provider(s) |
| Clear |
| ⬀ Open |
| ✎ Annotate Document |

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.

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

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

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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.

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).

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

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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 detailed report by selecting 'Yes' to include the deta...

Cumulative Preventive Care Bonus

Arispe, Esteban for Fiscal Year Ending March 31, 2018

Influenza Vaccine	Covered #	Excluded #	Target Pop.	Ratio	Service Code	Req. Ratio
Reported Patients:	0		95	0%		
Detected Patients:	0		95	0%		
~~Appleton, Joan~~			Not Covered			
~~Aurelle, Murrey~~	~~775xxxxxxx~~		Not Covered			
~~Babberd, Pearl~~	~~5231xxxxxx~~		Not Covered			
~~Batula, Andreas~~	~~3800xxxxxx~~		Not Covered			
~~Bonus, Money~~	~~9642xxxxxx~~		Not Covered			

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

Cumulative Preventive Care Bonus

Arispe, Esteban for Fiscal Year Ending March 31, 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).
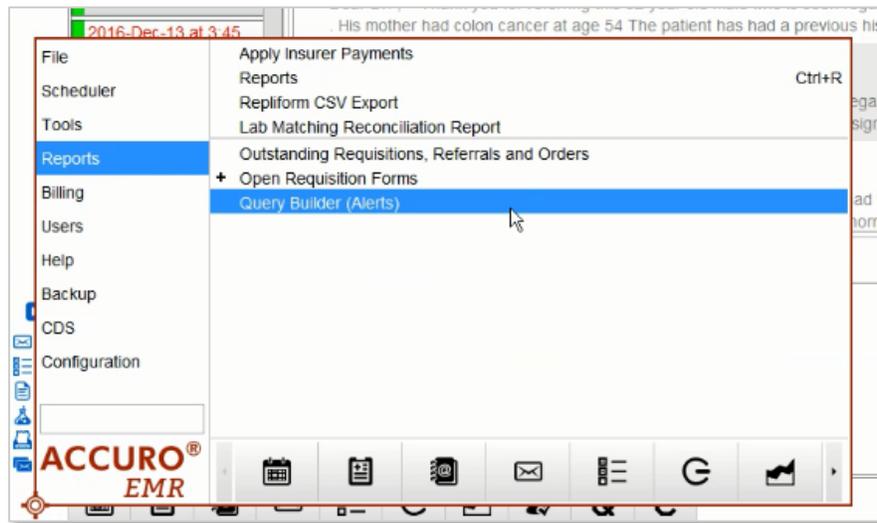

Accuro maintains an online repository, sometimes referred to as 'the Cloud' or 'Alert Publisher', consisting of queries that users have published/uploaded for sharing.

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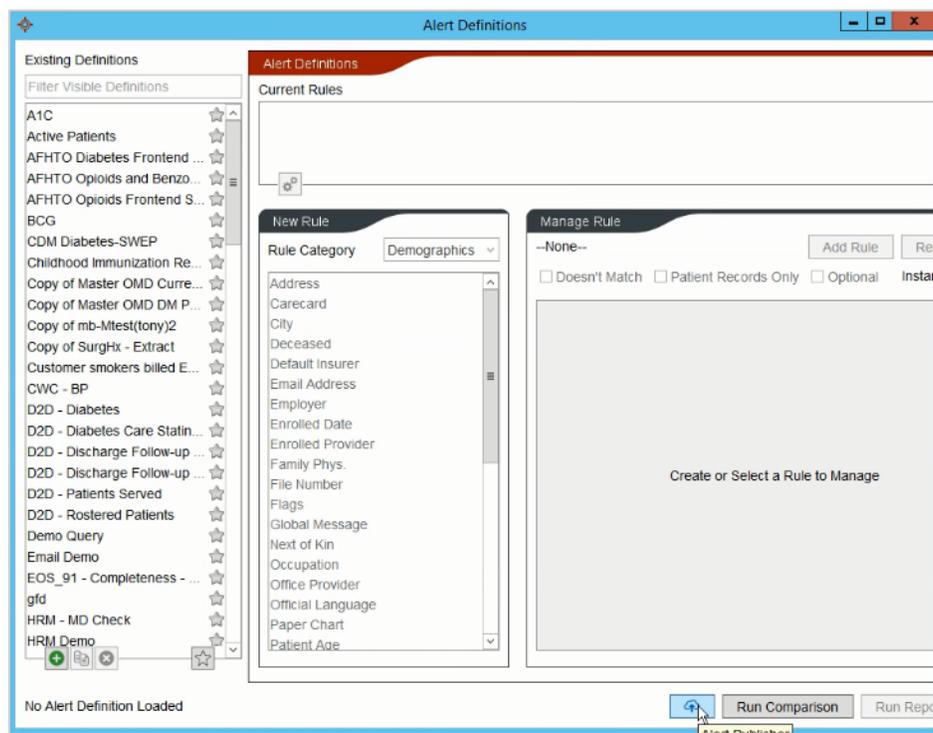
In the alert definition publisher window, users can simply click the search magnifying glass to view all published alerts. Alternatively, users can enter a keyword and/or publisher to filter their results.

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To download a published alert, click on the desired alert > click 'Download Alert' at the bottom right > click 'OK'.
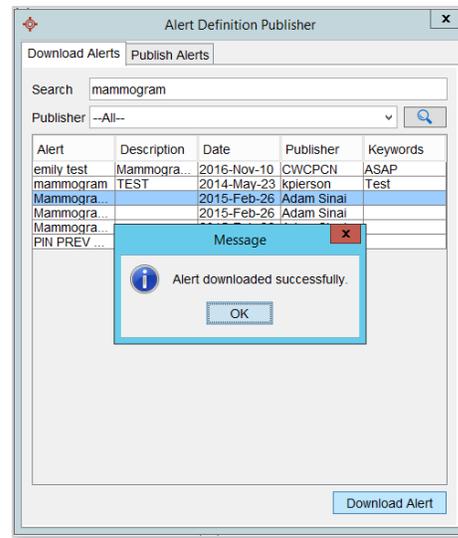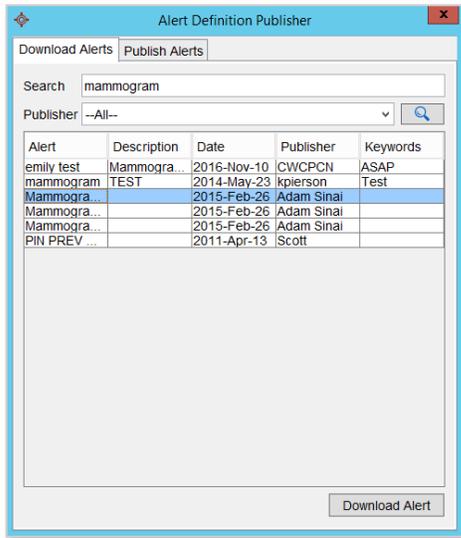
The published alert will now appear in your alert definition list. Click to highlight the downloaded alert > click 'Run Report' at the bottom right.

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'.

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.

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.
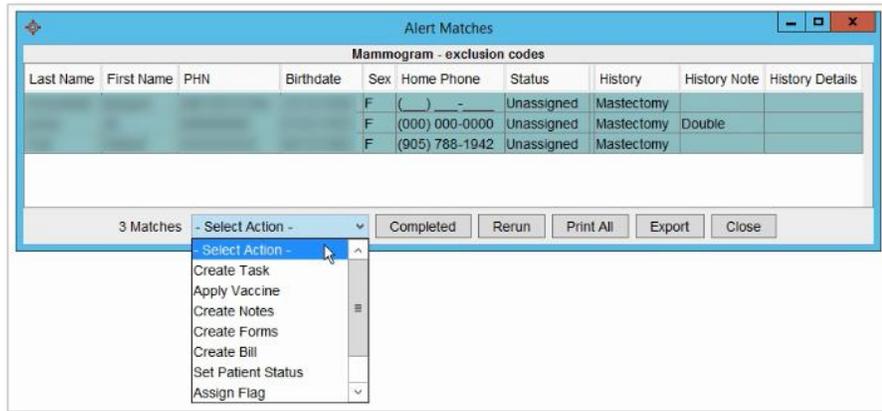
Creating Custom Queries

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

To access the query feature, click Bullseye > Reports > Query Builder (Alerts).
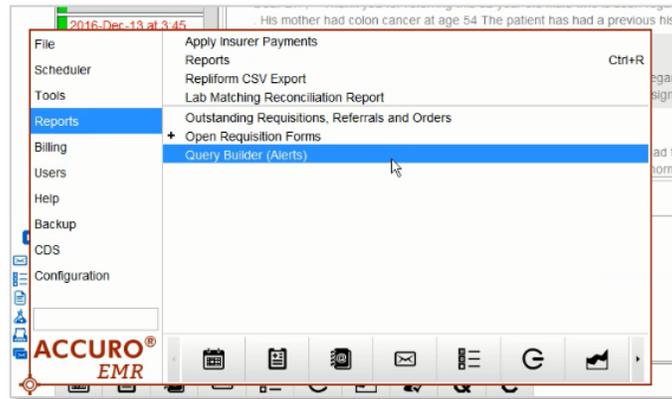
To create a new query, in the Alerts Definition window, click the green **+** in the bottom left > name the query > click 'OK'.
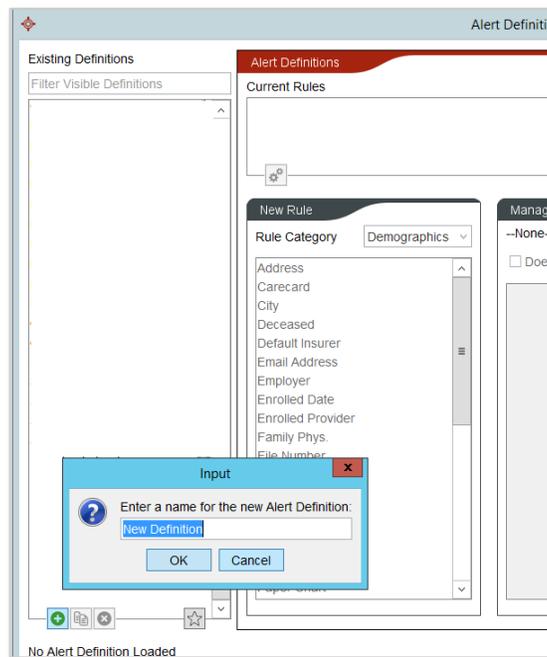
The newly name query will now appear in the 'Existing Definitions' list on the left-hand side and will be in focus (highlighted blue). To the right, users can define the parameters of their query by adding rules.
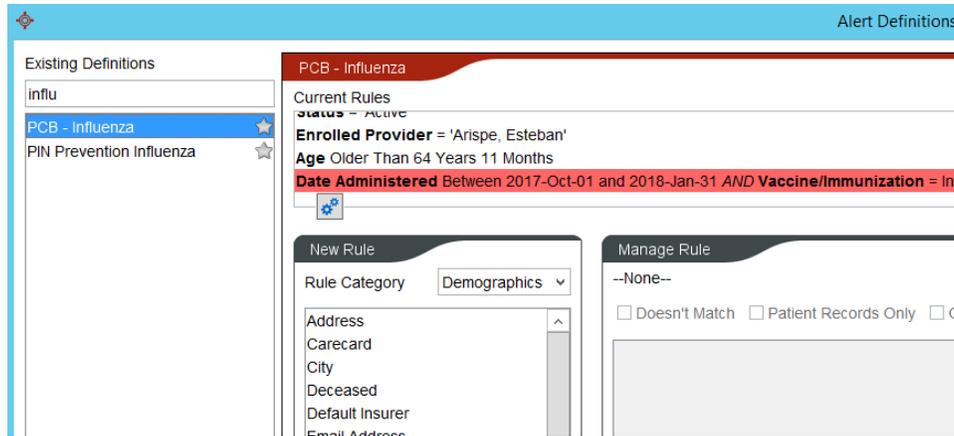
Illustrated in the series of steps below, we will create an Influenza search. The first rule is that the patients must be active.

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.
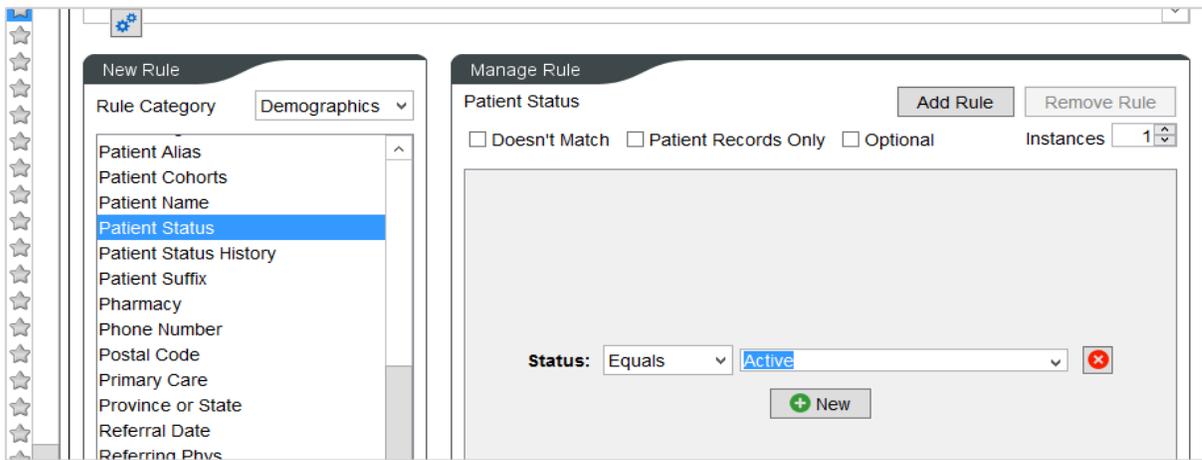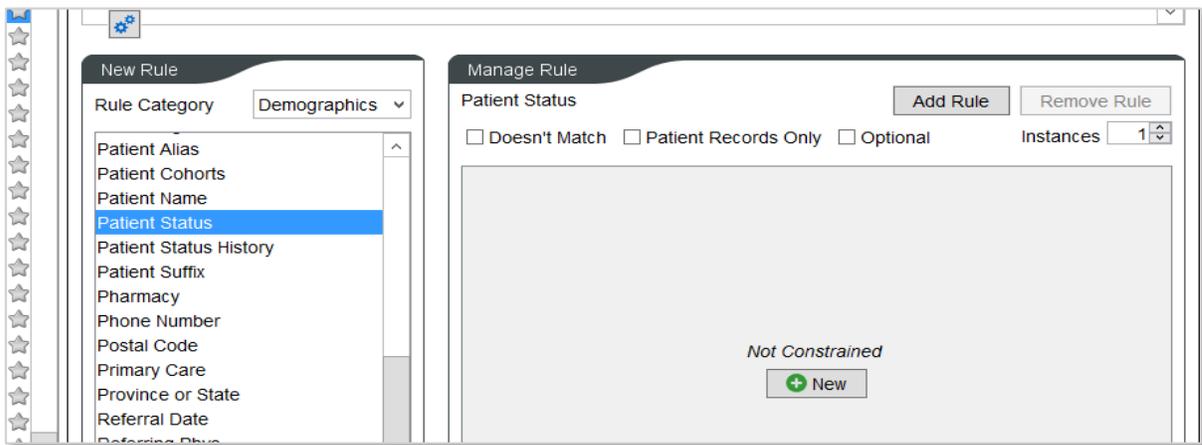
With 'Demographics' still selected in the 'New Rule' section, under 'Rule Category' click 'Enrolled Provider' > in the 'Manage Rule' section to the right, click 'New' > use the magnifying glass to search for the provider in the 'provider search' window that will open, highlight the provider in the search results and click select > click 'Add Rule' in the top right of the 'Manage Rule' section.
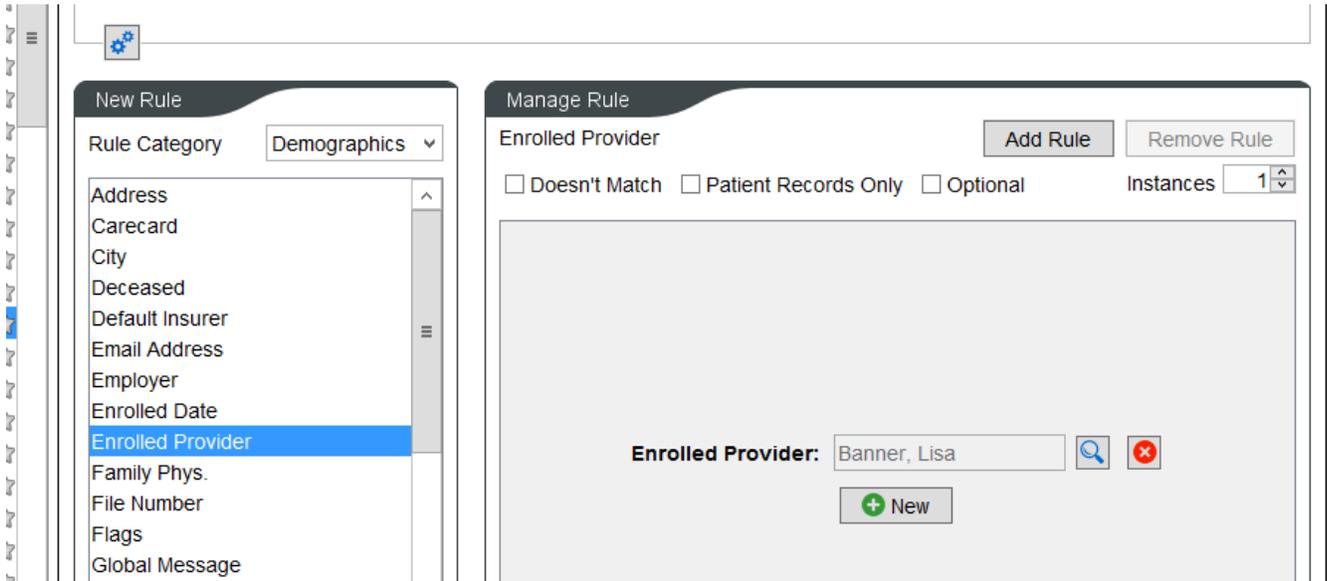
With 'Demographics' still selected in the 'New Rule' section, under 'Rule Category' click 'Patient Age' > in the 'Manage Rule' section to the right, click the drop-arrow in the 'Age' field and adjust the age parameters accordingly > click 'Add Rule' in the top right of the 'Manage Rule' section.
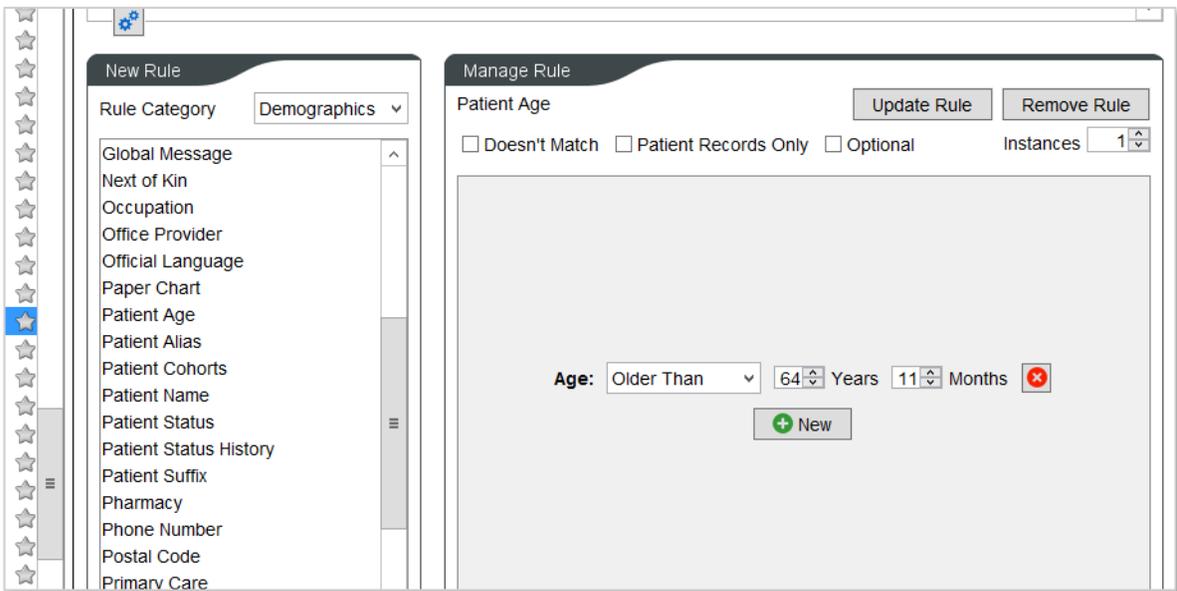
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To the right of the words 'Rule Category' in the 'New Rule' section, click the down-arrow and select 'Immunizations' > under 'Rule Category' click 'Immunizations' > in the 'Manage Rule' section to the right, click 'New' > click 'Vaccine/Immunization' > 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.
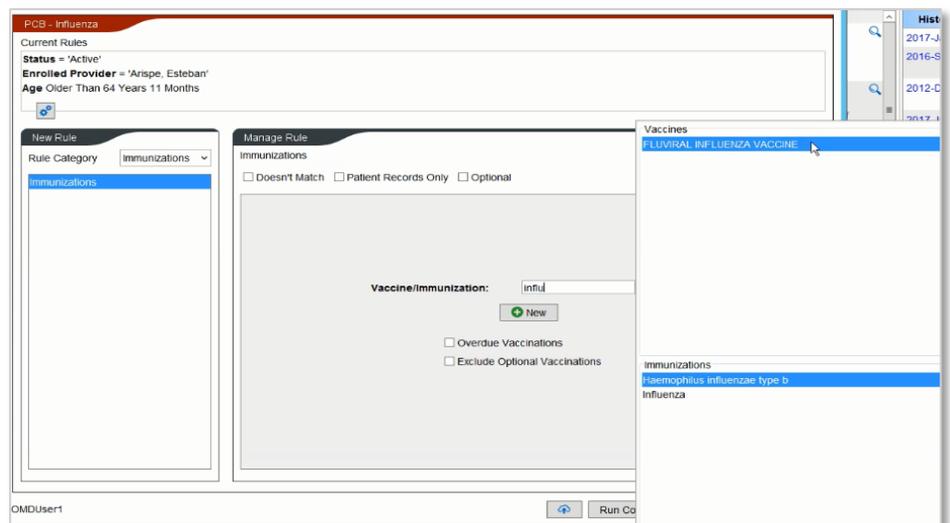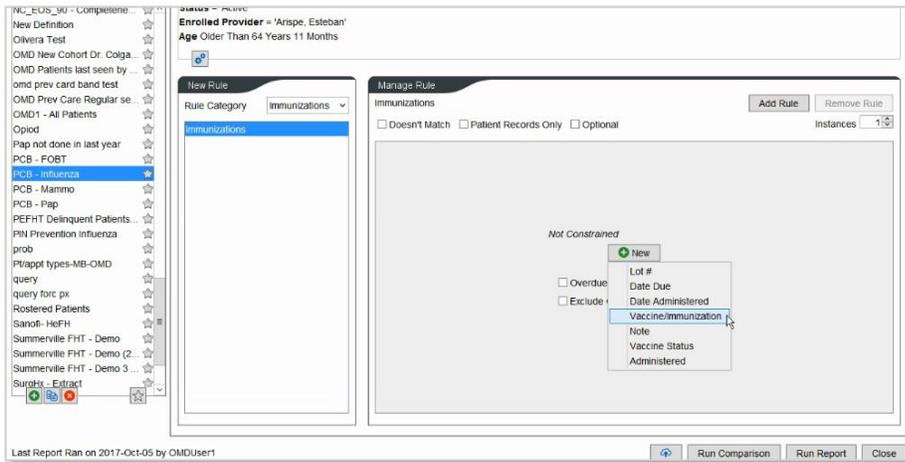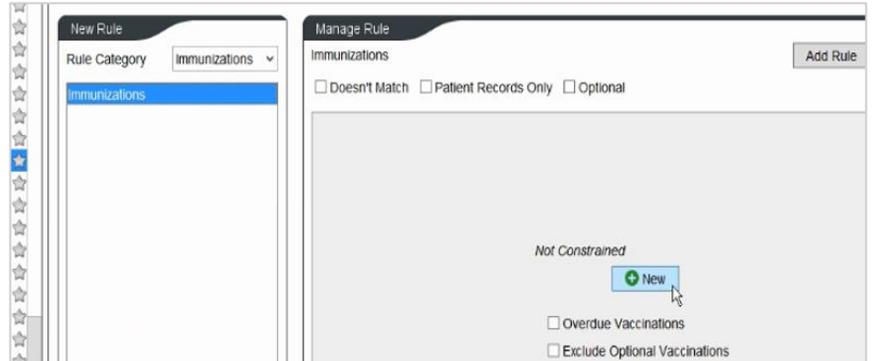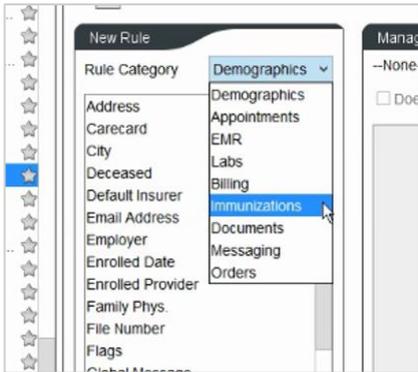
We want to know who has **NOT** had the influenza vaccine, so with the influenza rule under the 'Current Rules' section selected (evidenced by it being highlighted in blue), in the 'Manage Rule' section, click 'Doesn't Match' and click 'Update Rule'.

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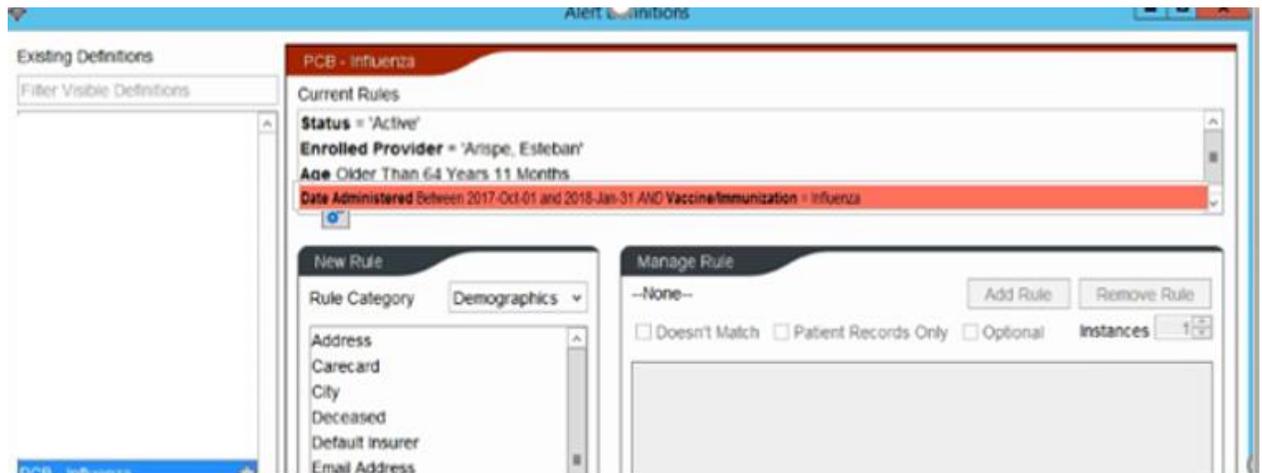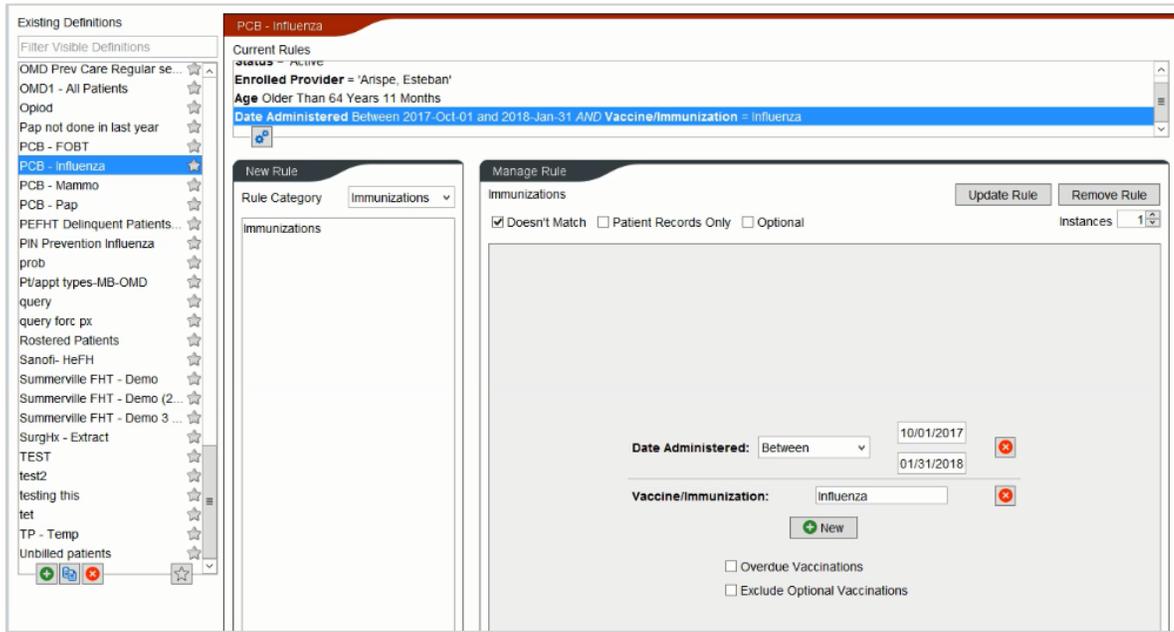
Upon completion of building the criteria for the influenza search, click 'Run Report' in the bottom right of the window.

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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'.

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.

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.

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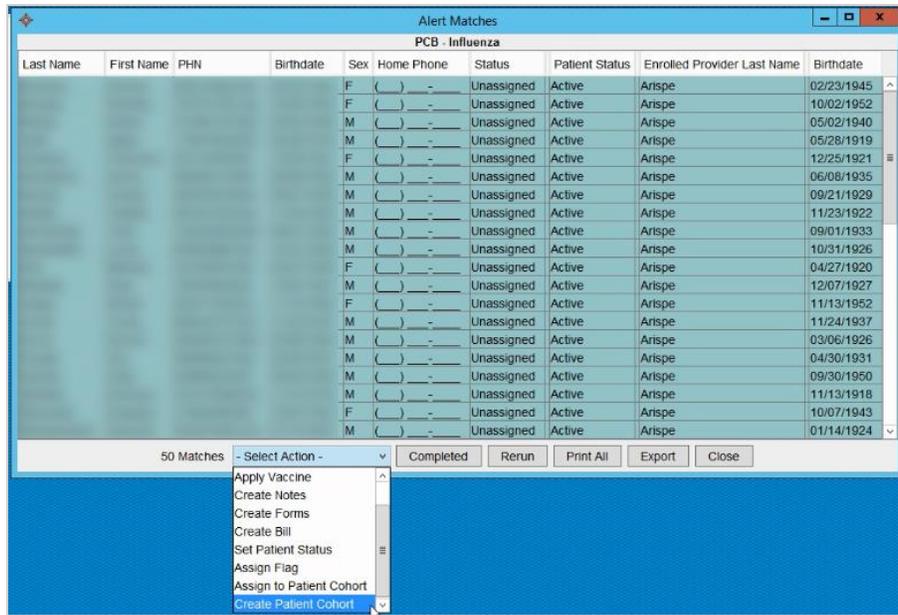
Select the provider to whom the cohort belongs and name the cohort.

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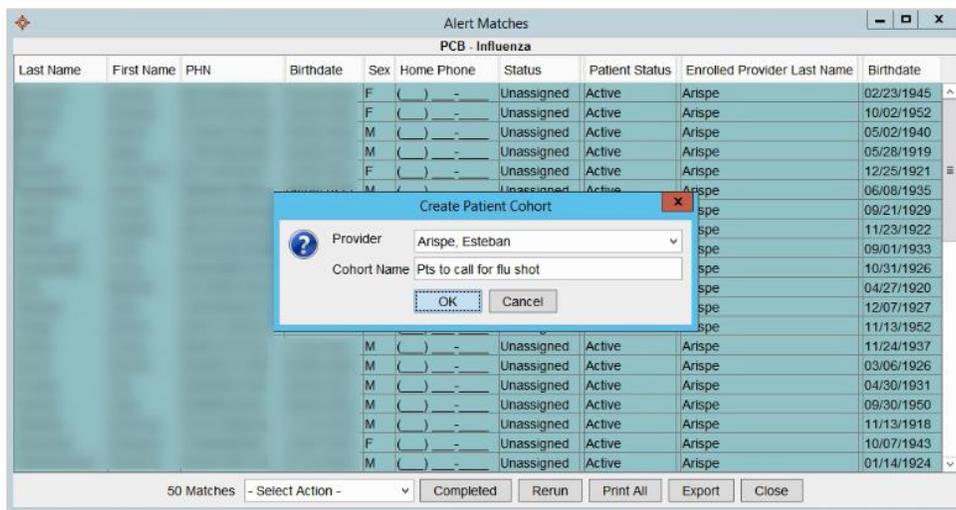
Managing Cohorts

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.


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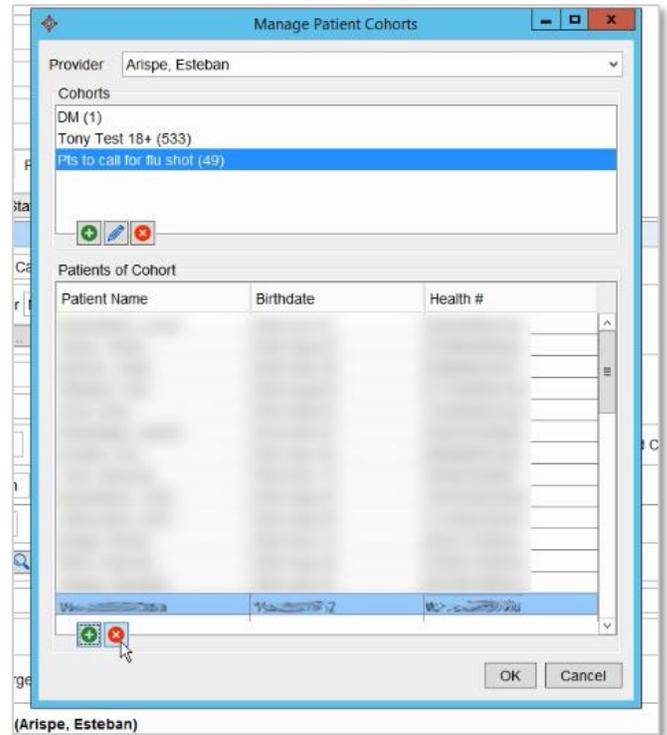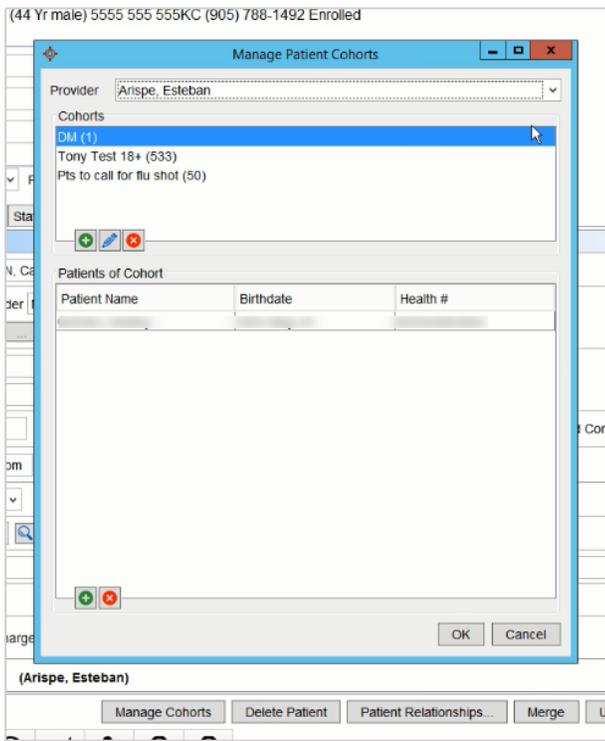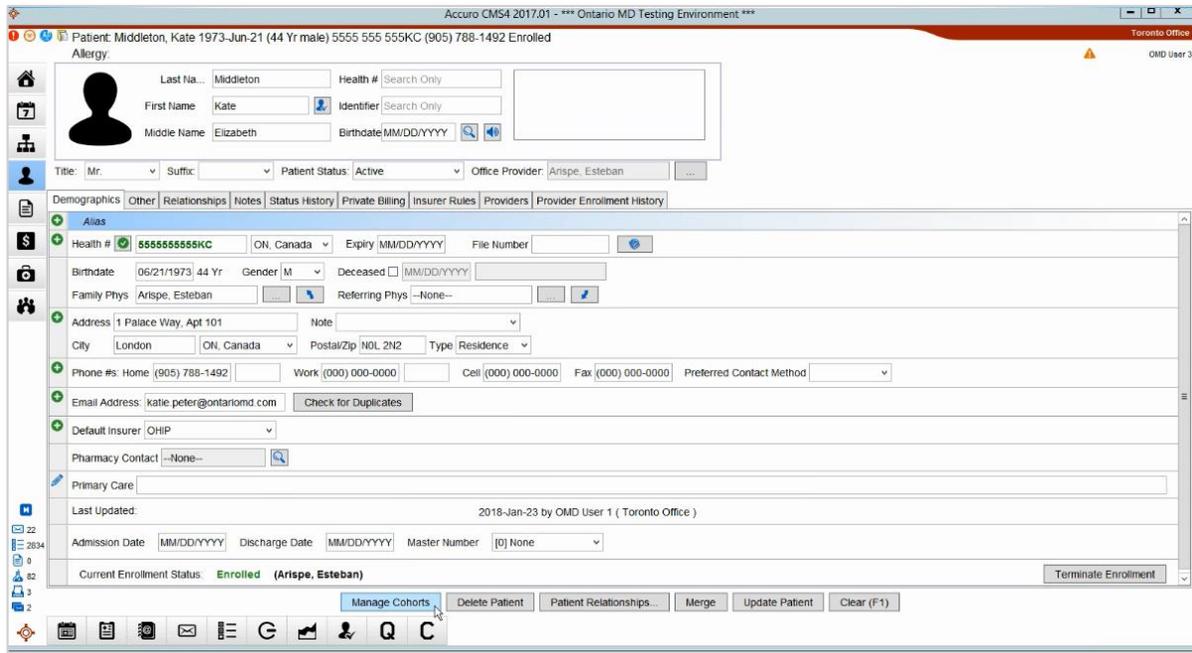
Tracking

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'.
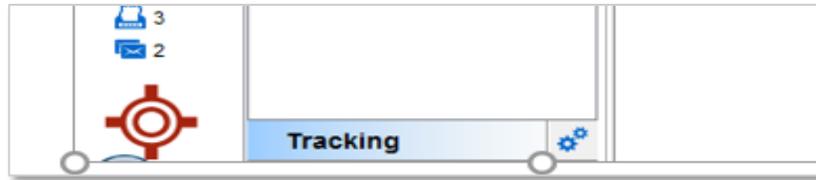
In the 'Tracking options' window that opens, click 'Enable Tracking' > once tracking is enabled, any tracking categories listed will be active however if no tracking categories are listed, click the green +, select the categories to track and click 'Add' > click 'OK'.
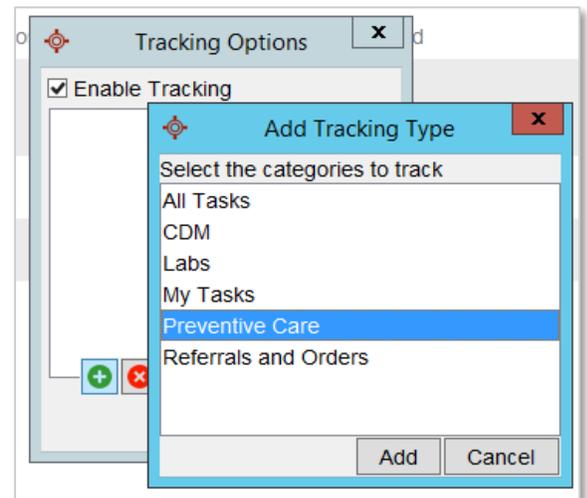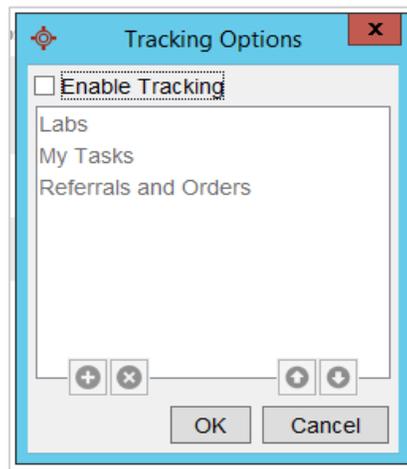
As illustrated in the following examples, the tracking functionality reports that this patient is due on 3 preventive care as the associated mapped QCodes/billing codes are not detected.

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

EMR Medical History Bands

The medical history bands native to Accuro EMR are appropriate to record patient's medical and cancer/prevention screening information. Addtionally, related cancer/prevention medical reports should be labeled appropriately in order to easily filter for and identify within the patients virtual chart.
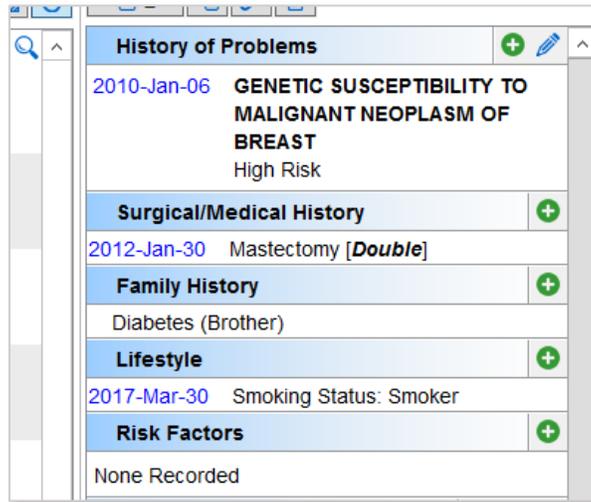
Some physcians have elected to create a custom band to appear within the patient's encounter notes specific for managing Preventive Care.

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