2024 Healthquest PCCA Setup Guide

Updated: October 2024

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Introduction

Each EMR has a searching tool built in to pull data or lists of patients based on user set criteria. These criteria can be highly customized and must be carefully structured to ensure accuracy. The guides below will show you what a full setup should look like from start to finish. Keep in mind that through collaboration you may have to adjust your queries as time goes on, due to different processes used by the clinics. This guide should be used as the starting point or a reference for how queries are built and what they should look like.

KEEP IN MIND: SCREENED VS DUE

Most of the queries that you will build will search for patients who are DUE for different tests. This is usually done by searching for the ABSENCE of certain labs / documents / scans / chart data in a specific date range. A query that searches for patients who are due can be easily converted into a list of

screened patients by changing the “and” option (except the first line of results) to “or” and removing the “not” filter that is put into each line. Examples will be given below.

USING THE ‘NOT’ FUNCTION

Usually when queries are built, they will search for if the patient HAS something. In your default build you will use the “not” function to change the criteria. This will search for if the patient DOES NOT have something. This is the key difference between a screened and a due query. Due queries are built using the “not” function. Screened Queries are built without it.

“AND” “OR’ FUNCTIONS

“AND” function is used between criteria in your queries. An “AND” function between two criteria means that the search must match BOTH those criteria. Ex: Pts of Dr X AND Appointment in last 6 months. Matching both criteria will cause the patient to be on the results. This is how most of our queries will be built.

“OR” Function is used when only one of many criteria need to be matched. A chart can be searched using the various filters and needs only one match to end up on the result list.

Healthquest Specific Considerations

BEFORE STARTING TO BUILD

Try to ensure a few things. Firstly, determine the end date reasons that the clinic uses by speaking with the IF. Usually there are 3 end date reasons in HQ that are always filtered when a new setup is created. These are Deceased, Inactive, Long-term Care. These are some of the default end date reasons that are in HQ out of the box. Additional reasons can be added by the clinic, and these may be used in different ways, so it is critical to obtain this information from your IF to correctly build all queries. If the clinic uses end dates then the end date reasons do not need to be excluded.

LEVELS

HQ queries can be structured into levels. This causes the search to be divided into different filters that are applied one at a time. This helps to organize the query and give a good visual when viewing it in the menu. This also ensures accurate results.

COPYING LINES

You may notice that you must enter multiple lines into a search that only has one value changed. Sometimes it is easier to copy a line within a query and change a value and save the line. This will save the work of creating a new search line from scratch.

COPYING QUERIES

From the main menu you can make a copy of a query that you have already built. This is useful for the setup you are about to do. Some queries can be built by copying an existing query and building upon it. This will save a lot of time but must be done carefully.

THIS GUIDE WILL SHOW YOU THE FOLLOWING:

1. MODIFYING THE ASAP
2. STEP BY STEP QUERY INSTRUCTIONS
3. CREATING WORKLIST TEMPLATES

Summary of Steps Involved

Week Prior (or a few days prior)

1. Contact HQ 780-438-3762 and ask to update the clinic’s template date fields to 20.

Day of:

1. Edit the ASaP template to match the current standard.
2. Build active panel query.
3. Copy active panel query as starting point for eligible queries.
4. Copy eligible queries and add test information to create due queries.

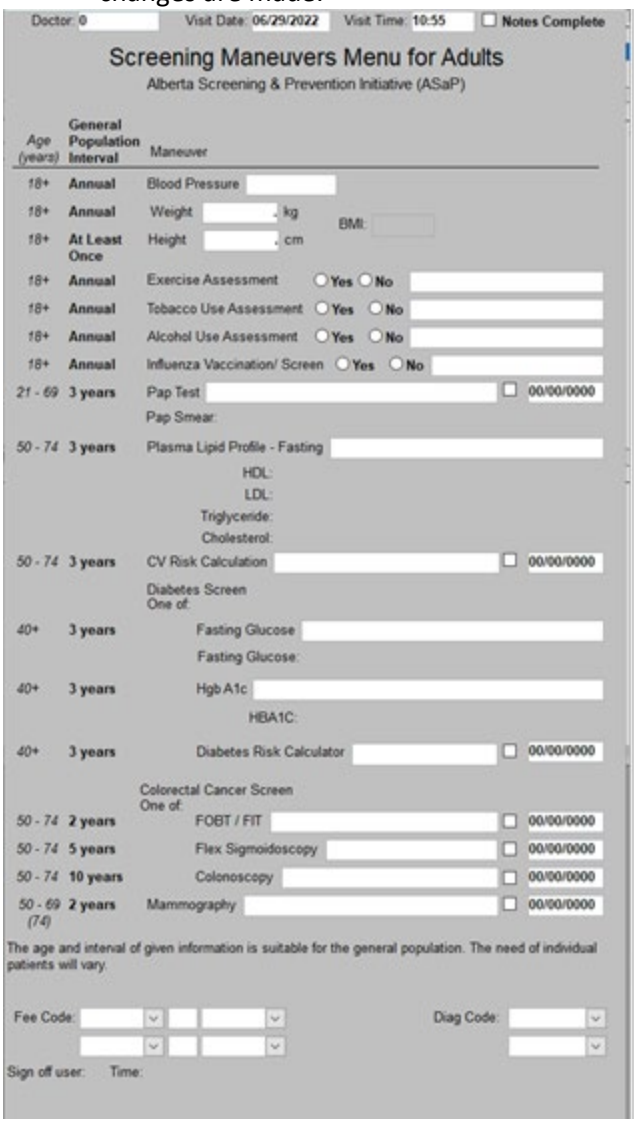
5. Once queries are done, take screenshots and run full baselines.

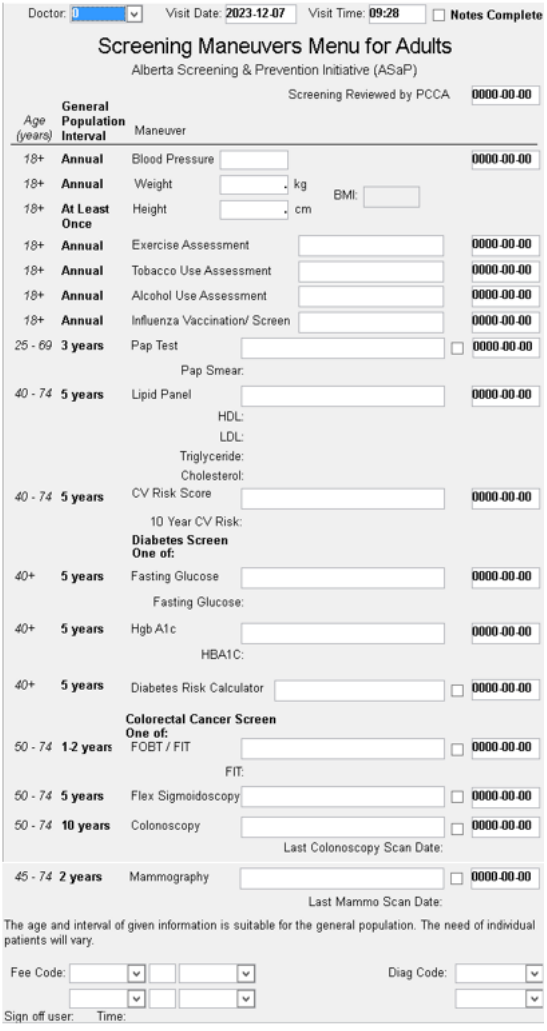
Modifying the ASaP Template in Healthquest

By default, all clinics have an ASaP template loaded into the EMR. Call technical support to add the updated version of the ASaP template with labs auto-populating into the corresponding fields The ASaP template should be updated prior to building your queries. In the following guide we will:

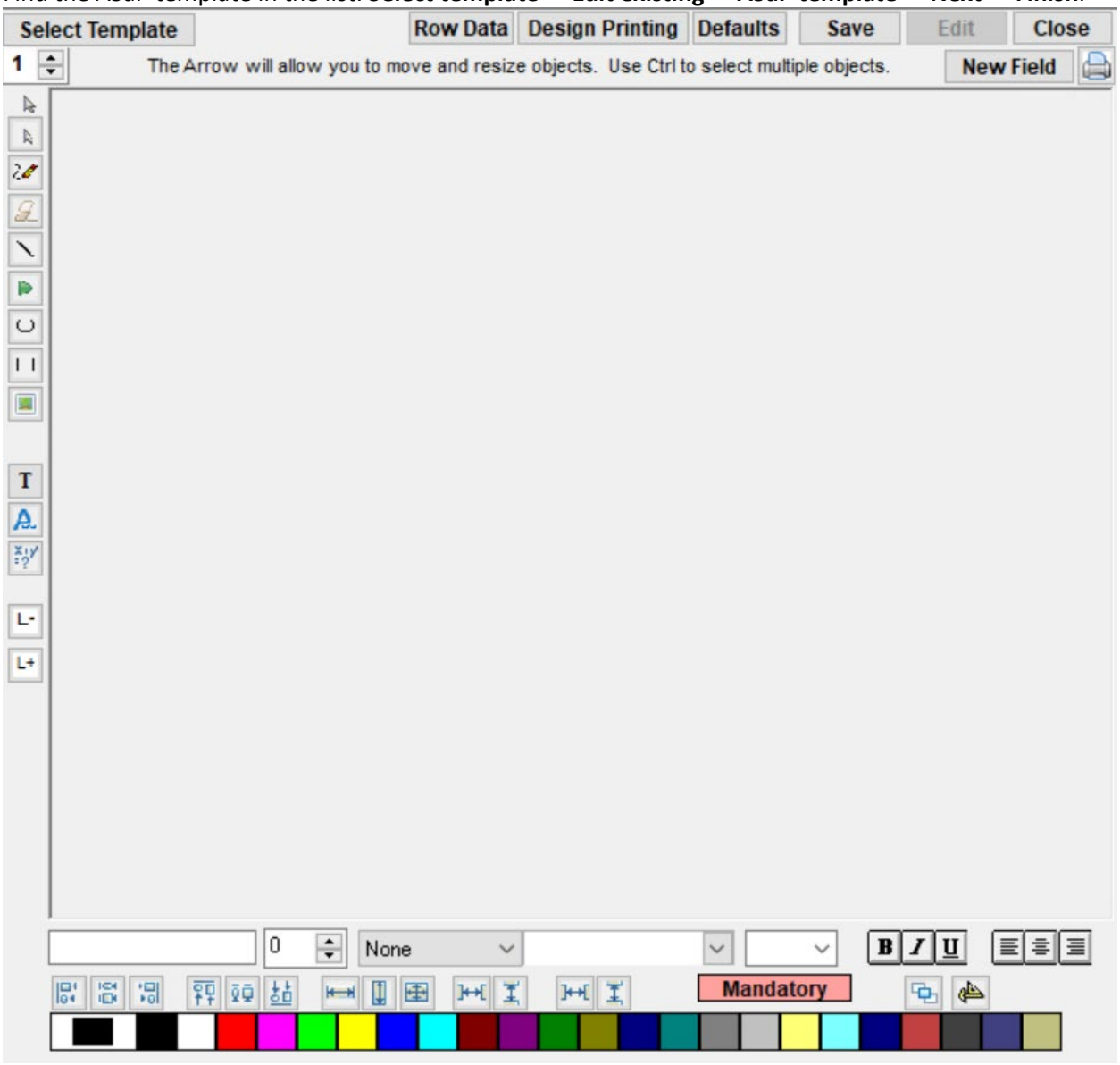
- add 1 date field to use for when screening is reviewed by the PCCA.
- Ensure that the lab test values from the EMR are pulled into the ASAP template.
- Additionally, if the clinic has scan type folders for colonoscopy and mammogram you can request from HQ to setup these to pull the date of the last scan.

- **Save frequently. There is no undo button.**
- The image below gives an overview of the default template and the resulting template after changes are made:





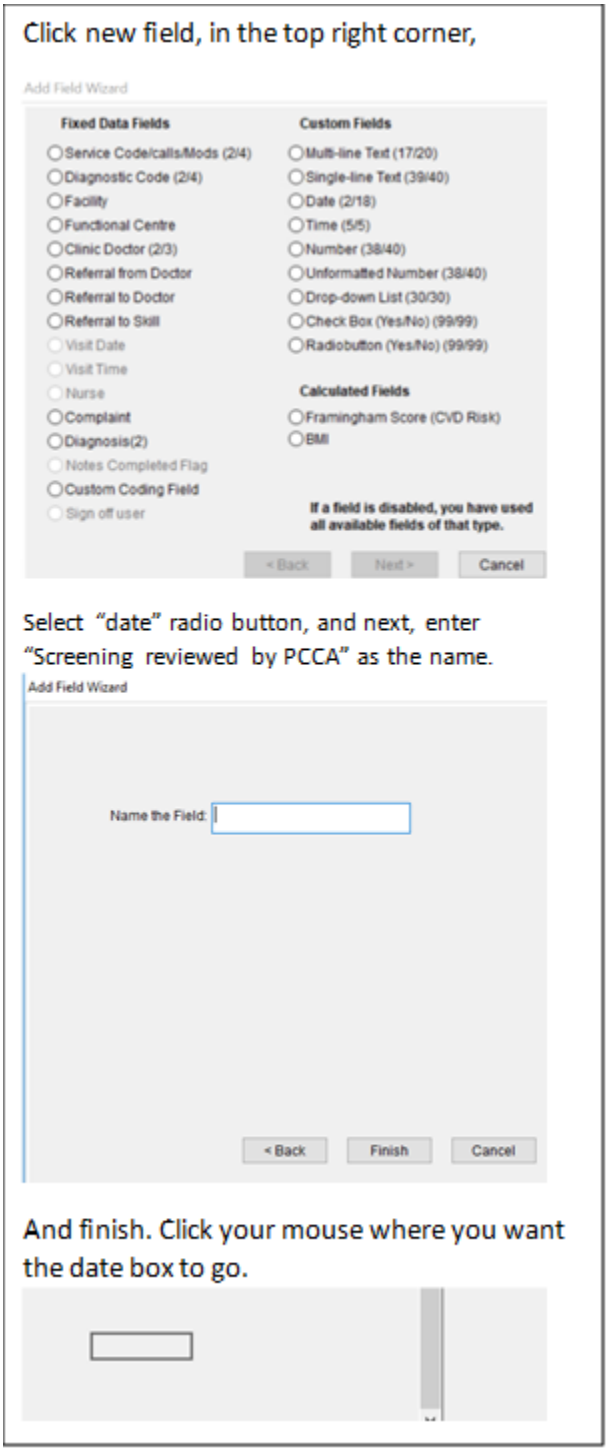
Open the template editor. **Setup -> Charting Setup -> Template Design**
Find the ASaP template in the list. **Select template -> Edit existing -> ASaP template -> Next -> Finish**.



LIGHT BLUE: Select Template = edit an existing template or create a new template.
GREEN: New Field = create new fields.
LIGHT PURPLE: Selection tool = use to move and resize objects, CTRL click to select multiple objects or click and drag to select all fields within the designated area.
YELLOW: Text tool = add text.
PINK: Computed Fields = use expressions to pull information from the chart into the template.
TEAL: Decrease/Increase Length = make the template longer or shorter.
BLACK: Field outline options = None is the default, change to box to outline the field.
LIME: Text options = (left to right) Font, Size, Bold, Italics, Underline, Align Left, Align Centre, Align Right
CYAN: Align Fields = (left to right) Align Left, Align Centre, Align Right, Align Top, Align at Centre, Align Bottom. Aligns the fields. Click your primary field then select (CTRL + click) the one you would like to have match it.

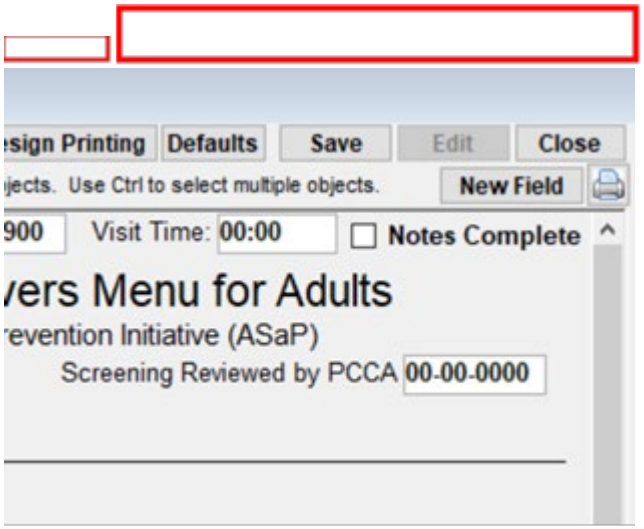
DARK PURPLE: Size Fields = (left to right) Size width, Size Height, Size both. Makes fields the same size. Click your primary field then select (CTRL + click) the one you would like to have match it.
ORANGE: Evenly space fields.
MAGENTA: Text colors. The color currently in use will appear in the first box on the left.

Updating the ASaP Template – Adding Screening Reviewed by PCCA



Add Date stamp "Screening Reviewed by PCCA". Select New Field -> Date -> Next. Then name the field Screening Reviewed by PCCA and select finish.

Drop the field onto the ASaP template underneath the title. Stretch the text field if required to ensure all the text is visible.



The text box will be cut off.

To correct this:

- Click on the words and a black box will appear highlighting the words.
- Place your mouse on the left edge, until you see a slanted double arrow.
- Drag the black box wider, so all the wording is visible.

- With the words highlighted in black, press and hold the 'Ctrl' button and click on the date box, release the ctrl button and both items will be highlighted black.
- Use the arrow keys on the keyboard to move these items to where you want them.
- If you want to move just one item, click on the one item to move, and drag it around using your mouse.

Make sure there is a date field for:

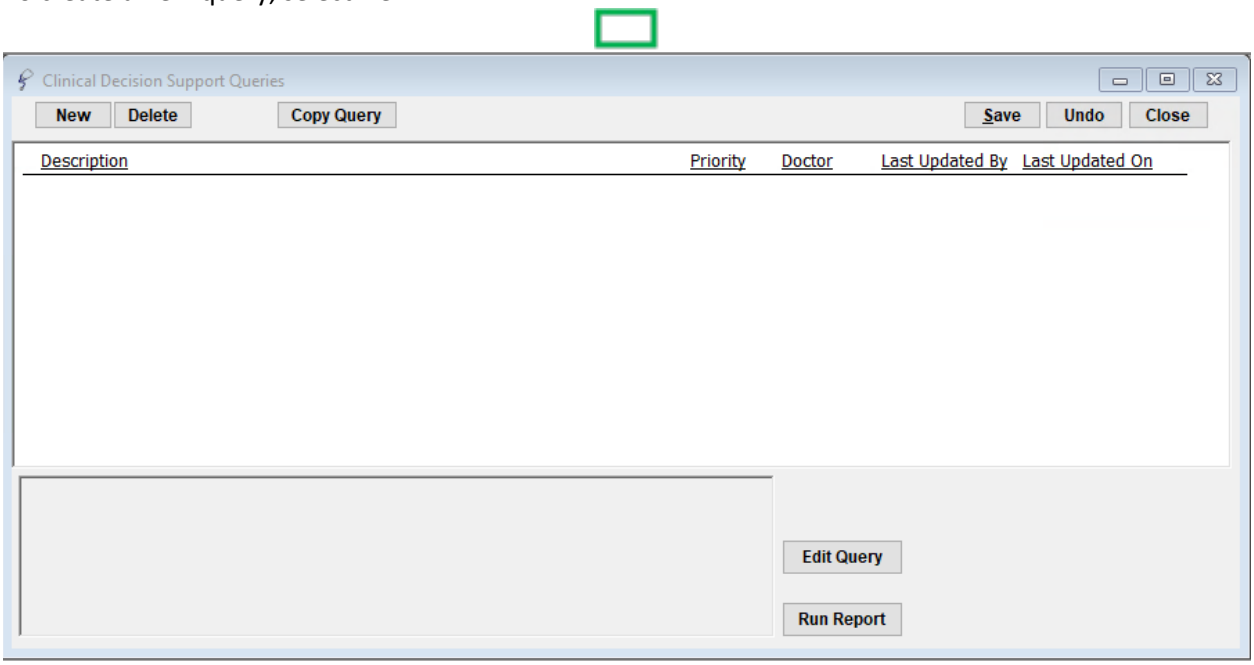
- Pap
- Lipid Panel
- Glucose Fasting
- Hemoglobin A1C
- CV Risk
- FIT
- Colonoscopy
- Mammogram

Building CDS Queries

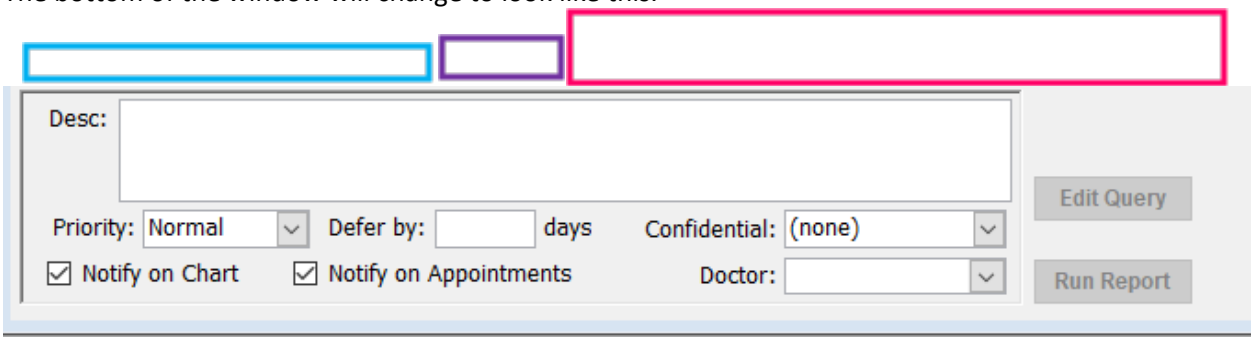
To build CDS Queries you will create them in the CDS Query Setup. To open this, go into Setup -> Charting Setup -> CDS Query Setup.

Before starting to build queries, find out if the clinic uses End Dates and/or End Date Reasons. If they use End Date Reasons but no date, you will need to add the end date reasons into your queries as exclusions. If they use End Dates (with or without a reason) the patient will automatically be removed from the lists.

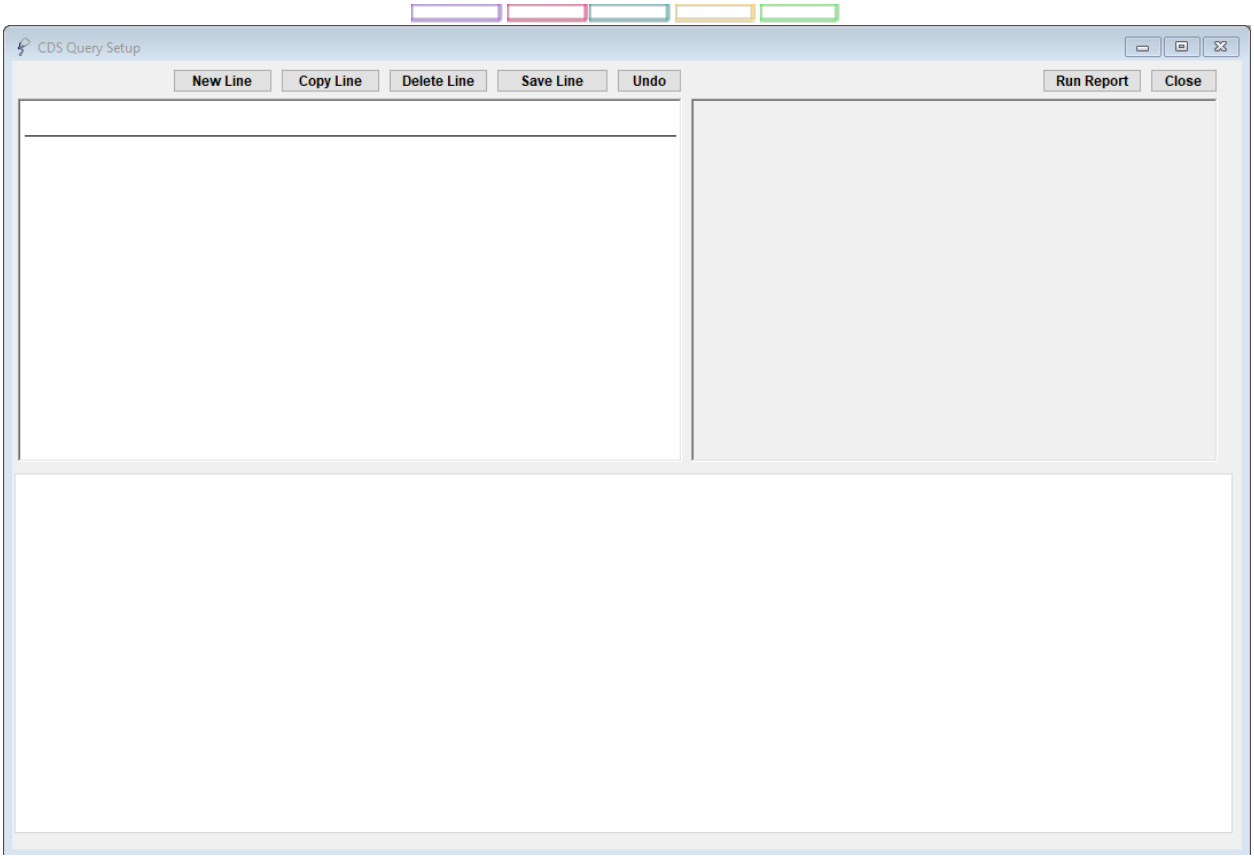
To create a new query, select New.



The bottom of the window will change to look like this.



Unselect **Notify on Chart** and **Notify on Appointments**, these fields create notifications. Type your query title in the **Description box**. Click Save in the top right corner, then **Edit Query**. The query window will then open, this is where you add your criteria.



You will create a **New Line** to start selecting criteria for your query. You should always start with Clients. This will allow you to select gender, age, default doctor, etc. **Save Line** once created. Continue with your criteria, adding information then saving each line. If you need to conduct multiple searches in the same area of the EMR you can **Copy Line** and just change the information. You can also **Delete Line** if you need to remove something. After you add each line, **Run Report** to verify that the criteria is working. When building queries we start with the active panel, how the clinic or physician identifies who their patients are. Usually we use client type: Valid Alberta Patient, Default Doctor and any additional criteria (ex: and not End Date Reason: Inactive). We will start with Quarterly Reporting Queries, eligible then due. Once those are complete, we build outreach by adding additional criteria to the Quarterly Reporting Due queries. We will also build a weekly tracking query and if the clinic would like notifications, we will build these based off the quarterly reporting due queries with any additional clinic specifications.

Quarterly Reporting Queries

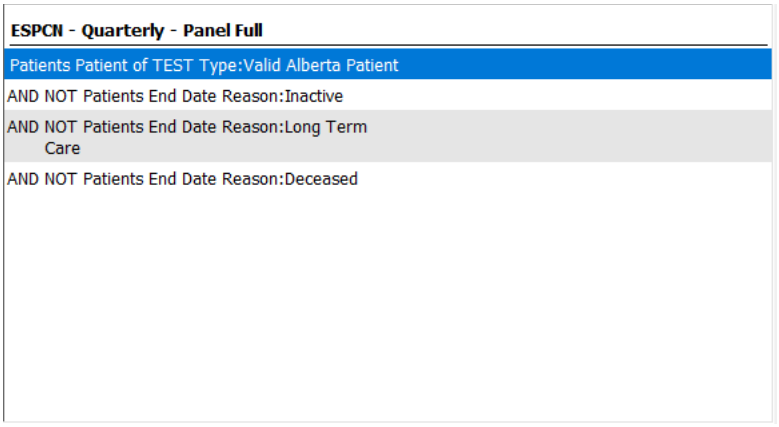
ESPCN – Quarterly – Panel Full

Create a new query titled: ESPCN – Quarterly – Panel Full, uncheck the notify box. Save then select Edit Query. Select New Line. Select Clients and Ok.

Line 1: Clients, select default doctor, select Valid Alberta Patients.

Line 2+: (and not) Clients, select end date reason inactive. Copy this line for all end date reasons that need to be excluded.

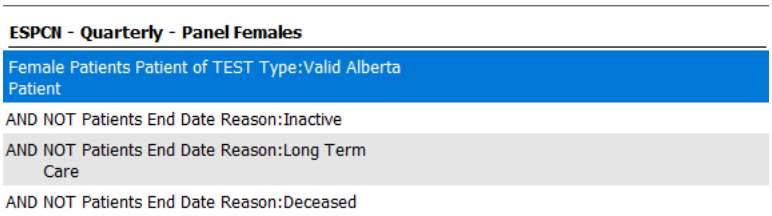
**Note – if the clinic uses end dates, no need to exclude end date reasons.*



ESPCN – Quarterly – Panel Females

From your list of CDS Queries, select the Panel Full query you created. Select Copy Query. In the Description box, rename the query ESPCN – Quarterly – Panel Females. Save and Edit Query.

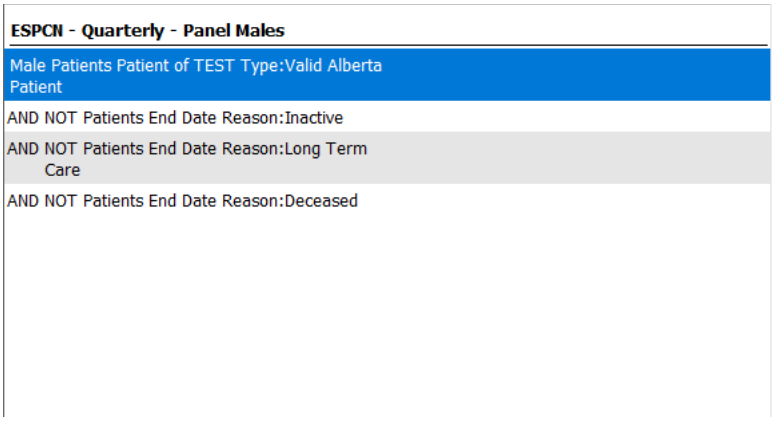
Edit the first line of the query by checking off gender, the use the dropdown to select Female.



ESPCN – Quarterly – Panel Males

Copy your Panel Females query. Rename the copy ESPCN – Quarterly – Panel Males. Change the gender selection to Male. Save and Edit Query. Save Line. Run Report.

Edit the first line of the query by changing the gender selection to male.



ESPCN – Quarterly – Panel Other/Unknown/X

Copy your ESPCN – Quarterly - Panel Males query. Rename the copy ESPCN -Quarterly – Panel Other/Unknown/X Gender.

Line 1: Change gender selection from male to other.

Line 2-4: Set end date reasons to level 2.

Line 5: Copy line 1 and change gender selection from other to unknown.

Lines 5-7: Copy lines 2-4.

Line 8: Copy line 5 and change gender selection from unknown to x.

Lines 9-11: Copy lines 2-4.

**Note: In a recent 2023 update, Healthquest has added Non-binary to the gender selections available in the client card. At the time of this manual's creation, non-binary is currently not available in the CDS Query builder options. Once this change has been made, copy the listed steps to add Non-binary into the query criteria.*

ESPCN - Quarterly - Panel Other/Unknown/X Gender
Other Patients Patient of TEST Type:Valid Alberta Patient
AND (NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased)
AND Unknown Patients Patient of TEST Type:Valid Alberta Patient
AND (NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased)
AND X Patients Patient of TEST Type:Valid Alberta Patient
AND (NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased)

ESPCN – Quarterly – Age Queries

Copy your Panel Full query. Rename the copy ESPCN – Quarterly – Panel 0-9. Save. Edit Query.

Edit the first line of the query by checking off age over 0 and age under 10.

ESPCN - Quarterly - Panel Ages 0-9
Patients over 0 under 10 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased

Copy this query, rename it ESPCN – Quarterly – Panel 10-19. Set the age range to over 10 under 20.
Copy this query, rename it ESPCN – Quarterly – Panel 20-29. Set the age range to over 20 under 30.
Copy this query, rename it ESPCN – Quarterly – Panel 30-39. Set the age range to over 30 under 40.
Copy this query, rename it ESPCN – Quarterly – Panel 40-49. Set the age range to over 40 under 50.
Copy this query, rename it ESPCN – Quarterly – Panel 50-59. Set the age range to over 50 under 60.

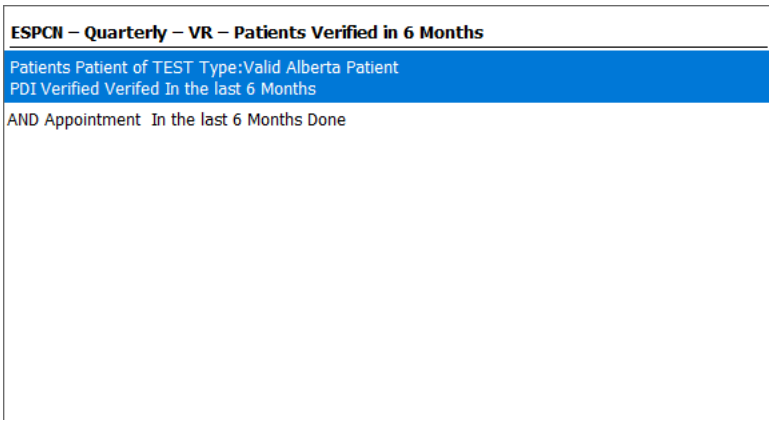
Copy this query, rename it ESPCN – Quarterly – Panel 60-69. Set the age range to over 60 under 70.
Copy this query, rename it ESPCN – Quarterly – Panel 70-79. Set the age range to over 70 under 80.
Copy this query, rename it ESPCN – Quarterly – Panel 80-89. Set the age range to over 80 under 90.
Copy this query, rename it ESPCN – Quarterly – Panel 90+. Set the age range to over 90 under 120.

ESPCN – Quarterly – VR – Patients Verified in 6 Months

Create a new query, name it: ESPCN – Quarterly – VR – Patients Verified in 6 Months. Save. Edit Query. Add a New Line. Clients. Check off **Default Doctor, select appropriate**. Check off **Client Type, select Valid Alberta Patients**. Check off the **Verified box** and the **Date** field beneath it. Set the date range as **In the last 6 Months**. Save Line.

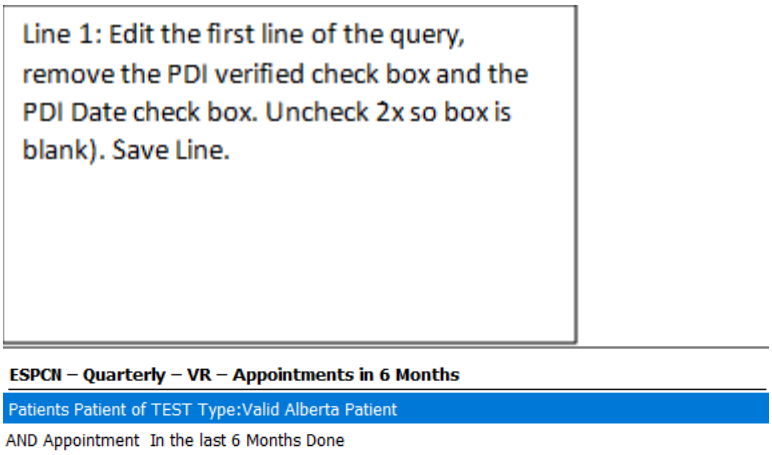
Line 1: Clients, Type: Valid Alberta Patients. Check off PDI Verified, PDI Date in the last 6 months.

Line 2: Appointments (and). Appointment Date in the last 6 months. Appointment State: Done.



ESPCN – Quarterly – VR – Appointments in 6 Months

Copy the Patients Verified in 6 Months query. Rename it ESPCN – Quarterly – VR – Appointments in 6 Months. Save and Edit Query.



ESPCN – Quarterly – VR – Patients Verified in 3 Years

Copy the Verified in 6 Months query. Rename it ESPCN – Quarterly – VR – Verified in 3 Years. Save and Edit Query. Change Verified in the last 6 Months to in the last 3 years. Save Line. Change the appointment in the last 6 months line to appointment in the last 3 years.

Line 1: Edit the first line of the query, change the PDI Date range to in the last 3 years.

Line 2: Change the appointment date range to in the last 3 years.

ESPCN – Quarterly – VR – Patients Verified in 3 Years

Patients Patient of TEST Type:Valid Alberta Patient
PDI Verified Verifed In the last 3 Years
AND Appointment In the last 3 Years Done

ESPCN – Quarterly – VR – Appointments in 3 Years

Copy the Appointments in 6 Months query. Rename it ESPCN – Quarterly – VR – Appointments in 3 Years. Save and Edit Query.

Line 2: Change the appointment date range to in the last 3 years.

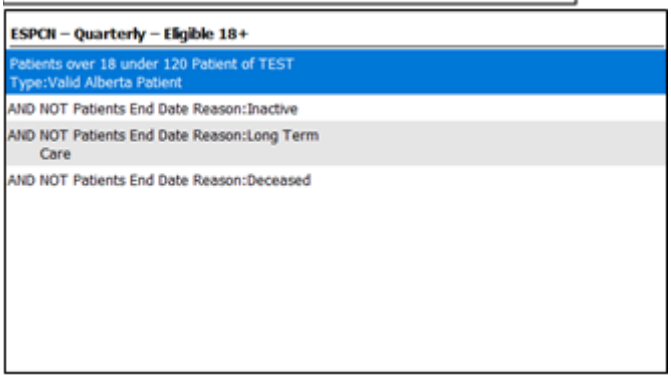
ESPCN – Quarterly – VR – Appointments in 3 Years

Patients Patient of TEST Type:Valid Alberta Patient
AND Appointment In the last 3 Years Done

ESPCN – Quarterly – Eligible 18+

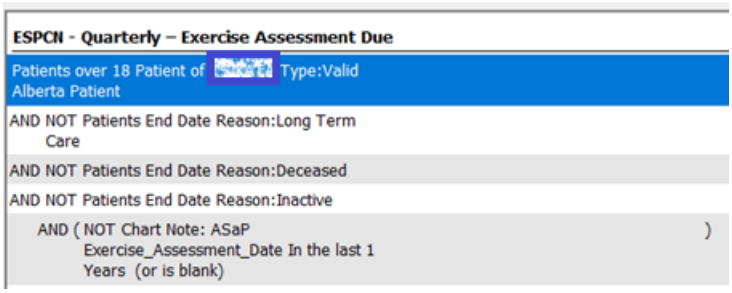
Copy the Panel Full query. Rename it ESPCN – Quarterly – Eligible 18+. Save and Edit Query.

Line 1: Check off the boxes beside Age over and Age under. Set the Age over field to 18 and the Age under field to 120.



ESPCN- Quarterly – Exercise Due

Copy your Eligible 18+ query. Rename it ESPCN - Quarterly - Exercise Due. Save. Edit Query.
The following are set as Level 2
Line 5: New Line – Chart Note (AND NOT), Select ASaP template, check off other date, select Exercise date
Optional Line 6: If the clinic uses a lifestyle assessment, add in this as well.



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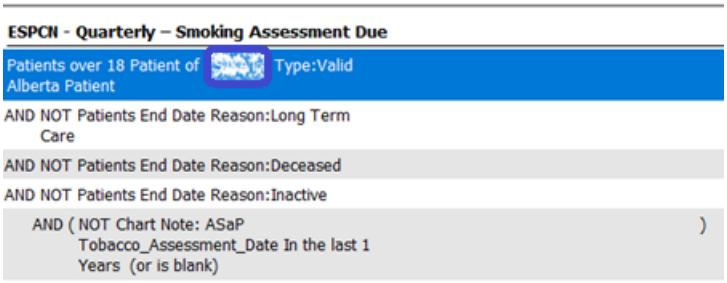
ESPCN- Quarterly – Tobacco Assessment Due

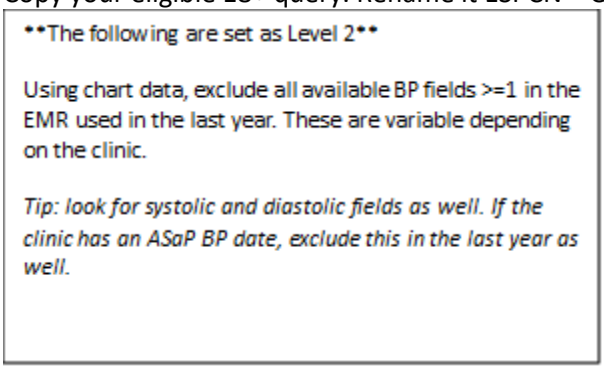
Copy your eligible 18+ query. Rename it ESPCN – Quarterly – Tobacco Due. Save. Edit Query.
The Following is set as Level 2
Line 5: New Line – Chart Note (AND NOT) select ASaP template, check off Other Date, select Tobacco Date



ESPCN - Quarterly – Smoking Assessment Due	
Patients over 18 Patient of [redacted] Type:Valid Alberta Patient	
AND NOT Patients End Date Reason:Long Term Care	
AND NOT Patients End Date Reason:Deceased	
AND NOT Patients End Date Reason:Inactive	
AND (NOT Chart Note: ASaP Tobacco_Assessment_Date In the last 1 Years (or is blank)	)

ESPCN- Quarterly – BP Due

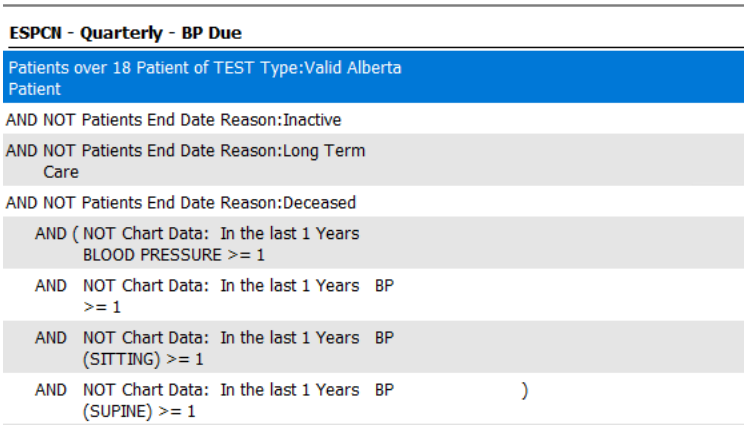
Copy your eligible 18+ query. Rename it ESPCN – Quarterly – BP Due. Save. Edit Query.



The following are set as Level 2

Using chart data, exclude all available BP fields >=1 in the EMR used in the last year. These are variable depending on the clinic.

Tip: look for systolic and diastolic fields as well. If the clinic has an ASaP BP date, exclude this in the last year as well.



ESPCN - Quarterly - BP Due	
Patients over 18 Patient of TEST Type:Valid Alberta Patient	
AND NOT Patients End Date Reason:Inactive	
AND NOT Patients End Date Reason:Long Term Care	
AND NOT Patients End Date Reason:Deceased	
AND (NOT Chart Data: In the last 1 Years BLOOD PRESSURE >= 1	
AND NOT Chart Data: In the last 1 Years BP >= 1	
AND NOT Chart Data: In the last 1 Years BP (SITTING) >= 1	
AND NOT Chart Data: In the last 1 Years BP (SUPINE) >= 1	)

ESPCN- Quarterly – Height & Weight Due

Copy your eligible 18+ query. Rename it ESPCN – Quarterly – Height & Weight Due. Save. Edit Query.

The following are set as Level 2

Using chart data, exclude all available Height fields >=1 in the EMR used in the 10/20/30 etc.. years. These are variable depending on the clinic.

Using chart data, exclude all available Weight fields >=1 in the EMR used in the 3 years. These are variable depending on the clinic.

If the clinic has an ASaP BMI date, exclude this in the last 3 years as well.

ESPCN - Quarterly - Height & Weight Due

```
Patients Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term
    Care
AND NOT Patients End Date Reason:Deceased
  AND ( NOT Chart Data:  In the last 20 Years
        HEIGHT >= 1
  AND   NOT Chart Data:  In the last 20 Years   HT
        >= 1
  AND   NOT Chart Data:  In the last 20 Years          )
        HT. >= 1
    AND (  NOT Chart Data:  In the last 3 Years
           WEIGHT >= 1
    AND    NOT Chart Data:  In the last 3 Years
           WT >= 1
    AND    NOT Chart Data:  In the last 3 Years           )
           WT. >= 1
```

ESPCN- Quarterly – Pap Eligible

Copy your Panel Females query. Rename it ESPCN – Quarterly – Pap Eligible. Save. Edit Query.

ESPCN - Quarterly - Pap Eligible

Female Patients over 25 under 70 Patient of TEST
Type:Valid Alberta Patient

AND NOT Patients End Date Reason:Inactive

AND NOT Patients End Date Reason:Long Term Care

AND NOT Patients End Date Reason:Deceased

AND NOT Chart Note: ASaP "Pap_Test" contains 'total hysterectomy' or "Pap_Test" contains 'total vaginal hysterectomy' or "Pap_Test" contains 'total abdominal hysterectomy'

AND NOT Chart Note: ASaP "Pap_Test" contains 'complete hysterectomy' or "Pap_Test" contains 'TAH'

Line 1: Set age to over 25 under 70.

Line 5-6: Exclude Chart Note "ASaP" pap text line containing Total Hysterectomy, Total Abdominal Hysterectomy, Total Vaginal Hysterectomy, Complete Hysterectomy, TAH.

Line 7-8: Exclude Chart Note "Patient History" – Surgical History containing: Total Hysterectomy, Total Abdominal Hysterectomy, Total Vaginal Hysterectomy, Complete Hysterectomy, TAH.

Line 9+: Exclude patients with a problem list entry of: Total Hysterectomy, Total Abdominal Hysterectomy, Total Vaginal Hysterectomy, Complete Hysterectomy, TAH (whatever is found using search feature). Use search feature to find problem list entries like "hysterectomy – total" and exclude all appropriate options.

AND NOT Chart Note: Patient History "Surgical_History" contains 'total hysterectomy' or "Surgical_History" contains 'total abdominal hysterectomy' or "Surgical_History" not contains 'total vaginal hysterectomy'

AND NOT Chart Note: Patient History "Surgical_History" contains 'complete hysterectomy' or "Surgical_History" contains 'tah'

AND NOT Problem total hysterectomy

AND NOT Problem total abdominal hysterectomy

AND NOT Problem total vaginal hysterectomy

AND NOT Problem complete hysterectomy

AND NOT Problem tah

ESPCN- Quarterly – Pap Due

Copy your Pap Eligible query. Rename it ESPCN – Quarterly – Pap Due. Save and edit query.

The following are set as Level 2

Exclude: Chart Note: ASaP pap date in the last 3 years.

Exclude: Lab: Test Description – Gynecological Cytology in the last 3 years.

Exclude: Lab: Test Description – DKML Cytology Gynecological n the last 3 years.

Exclude: Lab: Test Description – Pap in the last 3 years.

Exclude: Scans: Image Date in the last 3 years, Notes Contain: Gynecological Cytology. Also, for DKML Cytology Gynecological. Exclude pap but only if there is a scan type: lab.

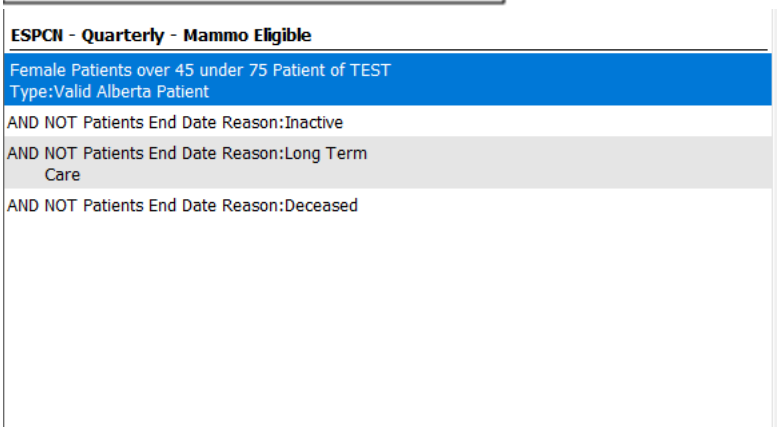
ESPCN - Quarterly - Pap Due

Female Patients over 25 under 70 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND NOT Chart Note: ASaP "Pap_Test" contains 'total hysterectomy' or "Pap_Test" contains 'total vaginal hysterectomy' or "Pap_Test" contains 'total abdominal hysterectomy'
AND NOT Chart Note: ASaP "Pap_Test" contains 'complete hysterectomy' or "Pap_Test" contains 'TAH'
AND NOT Chart Note: Patient History "Surgical_History" contains 'total hysterectomy' or "Surgical_History" contains 'total abdominal hysterectomy' or "Surgical_History" not contains 'total vaginal hysterectomy'
AND NOT Chart Note: Patient History "Surgical_History" contains 'complete hysterectomy' or "Surgical_History" contains 'tah'
AND NOT Problem total hysterectomy
AND NOT Problem total abdominal hysterectomy
AND NOT Problem total vaginal hysterectomy
AND NOT Problem complete hysterectomy
AND NOT Problem tah
AND (NOT Chart Note: ASaP Pap_Date In the last 3 Years
AND NOT Lab Result In the last 3 Years Gynecological Cytology
AND NOT Lab Result In the last 3 Years DKML Cytology Gynecological
AND NOT Lab Result In the last 3 Years Cytology Report; Cervical/Vaginal
AND NOT Scan In the last 3 Years Notes: Gynecological Cytology
AND NOT Scan In the last 3 Years Notes: DKML Cytology Gynecological
AND NOT Scan In the last 3 Years Type: Labs Notes: Pap)

ESPCN- Quarterly – Mammo Eligible

Copy your Panel Females query. Rename it ESPCN – Quarterly – Pap Eligible. Save. Edit Query.

Line 1: Set age range as over 45 and under 75.



ESPCN- Quarterly – Mammo Due

Copy your Mammo Eligible query. Rename it ESPCN – Quarterly – Mammo Due. Save. Edit Query.

The following are set as Level 2

Exclude: Chart Note - ASaP Mammogram Date in the last 2 years.

Exclude: Labs in the last 2 years with a test description of mammo.

Exclude: Scans with an Image Date in the last 2 years with a type: Mammogram (if applicable).

Exclude: Scans with an Image Date in the last 2 years where Notes contain mammo.

ESPCN - Quarterly - Mammo Due

Female Patients over 45 under 75 Patient of TEST Type:Valid Alberta Patient

AND NOT Patients End Date Reason:Inactive

AND NOT Patients End Date Reason:Long Term Care

AND NOT Patients End Date Reason:Deceased

AND (NOT Chart Note: ASaP Mammogram_Date In the last 2 Years

AND NOT Lab Result In the last 2 Years mammo

AND NOT Scan In the last 2 Years Type: Mammogram

AND NOT Scan In the last 2 Years Notes: mammo)

ESPCN- Quarterly – CRC Eligible

Copy your Panel Full query, rename it ESPCN – Quarterly -CRC Eligible. Save. Edit Query.

Line 1: Set age range as over 50 and under 75.

ESPCN - Quarterly - CRC Eligible

Patients over 50 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased

ESPCN- Quarterly – CRC Due

The following are set as Level 2
Exclude: Chart Note - ASaP FIT Date in the last 2 years.
Exclude: Chart Note - ASaP Flex Sig Date in the last 5 years.
Exclude: Chart Note - ASaP Colonoscopy Date in the last 10 years.

Exclude: Labs in the last 2 years with a test description of Immunochemical.
Exclude: Labs in the last 2 years with a test description of FIT.
Exclude: Labs in the last 5 years with a test description of sigmoidoscopy.
Exclude: Labs in the last 10 years with a test description of colonoscopy.

Exclude: Scans with an Image Date in the last 2 years with a type: Labs (if applicable) Notes contain FIT. **do not just search scans for FIT, can pull incorrect info ex: benefit.*
Exclude: Scans with an Image Date in the last 2 years where Notes contain Fecal Immunochemical Test.
Exclude: Scans with an Image Date in the last 5 years where Notes contain sigmoidoscopy.
Exclude: Scans with an Image Date in the last 10 years with a type: Colonoscopy (if applicable).
Exclude: Scans with an Image Date in the last 10 years where notes contain Colonoscopy.

Copy your CRC Eligible query, rename it ESPCN – Quarterly – CRC Due. Save. Edit query.

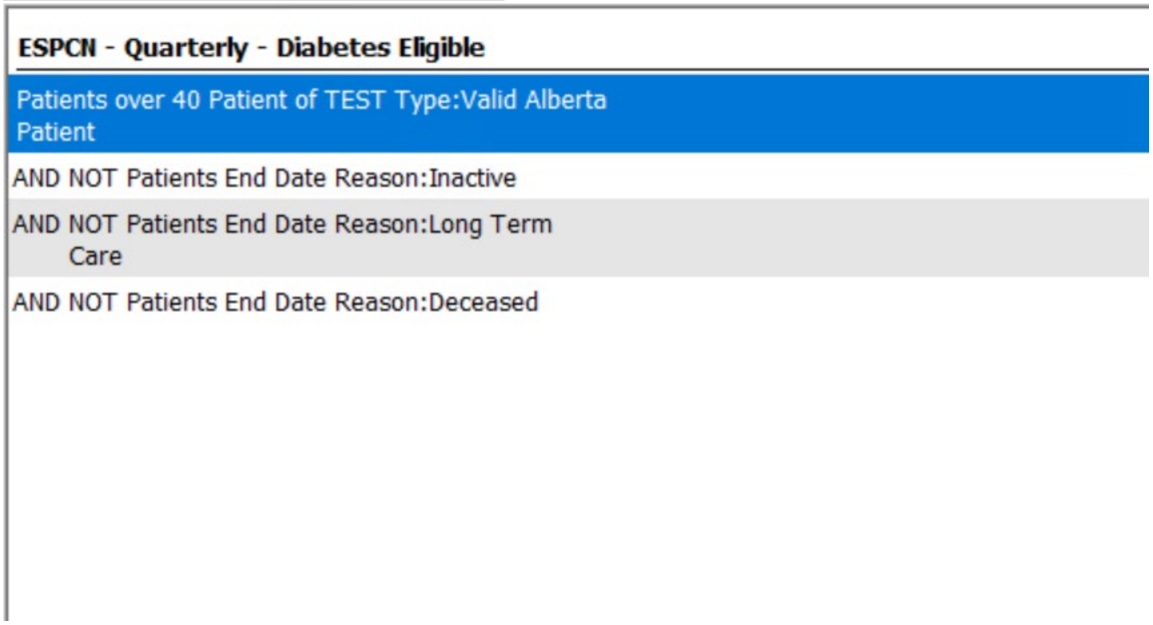
ESPCN - Quarterly - CRC Due

Patients over 50 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (NOT Chart Note: ASaP FOBT_FIT_Date In the last 2 Years
AND NOT Chart Note: ASaP Flex_Sig_Date In the last 5 Years
AND NOT Chart Note: ASaP Colonoscopy_Date In the last 10 Years
AND NOT Lab Result In the last 2 Years Immunochemical
AND NOT Lab Result In the last 2 Years Occult Blood (FIT); Stool; Manual
AND NOT Lab Result In the last 5 Years sigmoidoscopy
AND NOT Lab Result In the last 10 Years colonoscopy
AND NOT Scan In the last 2 Years Type: Labs Notes: FIT
AND NOT Scan In the last 2 Years Type: Labs Notes: fecal immunochemical test
AND NOT Scan In the last 5 Years Notes: sigmoidoscopy
AND NOT Scan In the last 10 Years Type: Colonoscopy
AND NOT Scan In the last 10 Years Notes: colonoscopy)

ESPCN- Quarterly – Diabetes Eligible

Copy your Panel Full query, rename it ESPCN – Quarterly – Diabetes Eligible. Save. Edit query

Line 1 – set age range as over 40.



ESPCN- Quarterly – Diabetes Due

Copy your Diabetes Eligible query, rename it ESPCN – Quarterly – Diabetes Due. Save. Edit Query

The following are set as Level 2
Exclude: Chart Note - ASaP a1c Date in the last 5 years.
Exclude: Chart Note - ASaP FG Date in the last 5 years.
Exclude: Chart Note - ASaP Diabetes Risk Calc. Date in the last 5 years. (if applicable)

Exclude: Labs in the last 5 years with a test description of a1c.
Exclude: Labs in the last 5 years with a test description of hba1c.
Exclude: Labs in the last 5 years with a test description of glucose, fasting.

Exclude: Scans with an Image Date in the last 5 years where Notes contain a1c.
Exclude: Scans with an Image Date in the last 5 years where Notes contain glucose, fasting.
Exclude: Scans with an Image Date in the last 5 years where Notes contain fasting glucose.

ESPCN - Quarterly - Diabetes Due

Patients over 40 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (NOT Chart Note: ASaP a1c_date In the last 5 Years
AND NOT Chart Note: ASaP FG_date In the last 5 Years
AND NOT Chart Note: ASaP DRC_date In the last 5 Years
AND NOT Lab Result In the last 5 Years HbA1c/Total Hemoglobin
AND NOT Lab Result In the last 5 Years HbA1c
AND NOT Lab Result In the last 5 Years Glucose Baseline
AND NOT Scan In the last 5 Years Notes: a1c
AND NOT Scan In the last 5 Years Notes: glucose, fasting
AND NOT Scan In the last 5 Years Notes: fasting glucose)

ESPCN- Quarterly – Lipids Eligible

Copy your Panel Full query, rename it ESPCN – Quarterly – Lipids Eligible. Save. Edit Query

Line 1 – set age range as over 40 under 75.

Exclude patients with Medications: Active RX only, drug name: Crestor. Repeat for Lipitor, Pravachol, Zocor and astatin.

ESPCN - Quarterly - Lipids Eligible

Patients over 40 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND NOT Medication Crestor Active Rx
AND NOT Medication Lipitor Active Rx
AND NOT Medication Pravachol Active Rx
AND NOT Medication Zocor Active Rx
AND NOT Medication astatin Active Rx

ESPCN- Quarterly – Lipids Due

Copy your Lipids Eligible query, rename it ESPCN – Quarterly – Lipids Due. Save. Edit Query

The following are set as Level 2
Exclude: Chart Note – AsaP lipid date in the last 5 years.

Exclude: Labs in the last 5 years with a test description of lipid.
Exclude: Labs in the last 5 years with a test description of cardiovascular disease risk.

Exclude: Scans with an Image Date in the last 5 years where Notes contain lipid (specify scan type: labs if applicable).

ESPCN - Quarterly - Lipids Due

Patients over 40 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND NOT Medication Crestor Active Rx
AND NOT Medication Lipitor Active Rx
AND NOT Medication Pravachol Active Rx
AND NOT Medication Zocor Active Rx
AND NOT Medication astatin Active Rx
AND NOT Lab Result In the last 5 Years Lipid
AND NOT Lab Result In the last 5 Years Cardiovascular Disease Risk
AND NOT Scan In the last 5 Years Type: Labs Notes: lipid)

ESPCN- Quarterly – CV Risk Eligible

Copy your Lipids Eligible query, rename it ESPCN – Quarterly – CV Risk Eligible. Save. No need to edit query.

ESPCN - Quarterly - CV Risk Eligible
Patients over 40 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND NOT Medication Crestor Active Rx
AND NOT Medication Lipitor Active Rx
AND NOT Medication Pravachol Active Rx
AND NOT Medication Zocor Active Rx
AND NOT Medication astatin Active Rx

ESPCN- Quarterly – CV Risk Due

Copy your CV Risk Eligible query, rename it ESPCN – Quarterly – CV Risk Due. Save. Edit Query

The following are set as Level 2

Exclude: Chart Data – In the last 5 years, any field contains: CVR. Copy and duplicate for CV Risk, Cardiovascular Risk, Cardiovascular Disease Risk, FRS, Framingham.

Exclude: Chart Note: ASaP – CV Risk Date in the last 5 years.

Exclude: Form with a date in the last 5 years, form type: Framingham (search and select all applicable).

Exclude: Labs in the last 5 years with a test description of cardiovascular disease risk with a result value >= 1.

Exclude: Scans with an Image Date in the last 5 years where Notes contain CVR. Copy and duplicate for CV Risk, Cardiovascular Risk, Cardiovascular Disease Risk, FRS, Framingham.

ESPCN - Quarterly - CV Risk Due
Patients over 40 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND NOT Medication Crestor Active Rx
AND NOT Medication Lipitor Active Rx
AND NOT Medication Pravachol Active Rx
AND NOT Medication Zocor Active Rx
AND NOT Medication astatin Active Rx
AND (NOT Chart Data: In the last 5 Years any field contains CVR
AND NOT Chart Data: In the last 5 Years any field contains CV Risk
AND NOT Chart Data: In the last 5 Years any field contains Cardiovascular Risk
AND NOT Chart Data: In the last 5 Years any field contains Cardiovascular Disease Risk
AND NOT Chart Data: In the last 5 Years any field contains FRS
AND NOT Chart Data: In the last 5 Years any field contains framingham
AND NOT Chart Note: ASaP CV_Risk_Date In the last 5 Years

AND	NOT Form In the last 5 Years Framingham Cardiovascular Risk Assessment
AND	NOT Lab Result In the last 5 Years Over 1 10-year Cardiovascular Disease Risk
AND	NOT Scan In the last 5 Years Notes: CVR
AND	NOT Scan In the last 5 Years Notes: CV Risk
AND	NOT Scan In the last 5 Years Notes: Cardiovascular Risk
AND	NOT Scan In the last 5 Years Notes: Cardiovascular Disease Risk
AND	NOT Scan In the last 5 Years Notes: FRS
AND	NOT Scan In the last 5 Years Notes: Framingham)

ESPCN- Quarterly QI- Active Patients (Denominator)

Copy your Panel Full query, rename as ESPCN – Quarterly QI – Active Patients (Denominator). Save. No need to edit.

ESPCN - Quarterly QI - Active Patients (Denominator)
Patients Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased

ESPCN- Quarterly- Patients 75+ (Denominator)

Copy your Quarterly QI – Active Patients (Denominator) query, rename ESPCN – Quarterly QI – Patients 75+ (Denominator).

Line 1 – set age range as over 75.

ESPCN - Quarterly QI - Patients 75+ (Denominator)

Patients over 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased

ESPCN- Quarterly- Chronic Disease Patients (Denominator)

Copy your Quarterly QI – Active Patients (Denominator) query, rename ESPCN – Quarterly QI – Chronic Disease Patients (Denominator).

Line 1 – set age range as over 75.

The following are set as Level 2

Include patients with a Claim – Diagnostic Code of 250.

Copy the above line, change the copy to OR instead of AND, change diagnostic code to 401. Copy this line and duplicate for 410-414, 420-429, 440-441, 491-492, 496, 585-586.

ESPCN - Quarterly QI - Chronic Disease Patients (Denominator)

Patients Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (AH Claim 250
OR AH Claim 401
OR AH Claim 410
OR AH Claim 411
OR AH Claim 412
OR AH Claim 413
OR AH Claim 414
OR AH Claim 420
OR AH Claim 421
OR AH Claim 422
OR AH Claim 423
OR AH Claim 424
OR AH Claim 425
OR AH Claim 426
OR AH Claim 427
OR AH Claim 428
OR AH Claim 429
OR AH Claim 440
OR AH Claim 441
OR AH Claim 491
OR AH Claim 492
OR AH Claim 496
OR AH Claim 585
OR AH Claim 586)

ESPCN- Quarterly- Patients Seen in the Last 3 Years (Numerator)

Copy your Quarterly QI – Active Patients (Denominator) query, and rename ESPCN – Quarterly QI – Patients Seen in the Last 3 Years (Numerator).

** Set as Level 2**
Include patients with a "done" appointments with the Default Doctor in the last 3 years.

ESPCN - Quarterly QI - Patients Seen in the Last 3 Years (Numerator)

Patients Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (Appointment In the last 3 Years Doctor:) TESTDone

ESPCN- Quarterly- Patients 75+, Seen in the Last Year (Numerator)

Copy your Quarterly QI – Active Patients (Denominator) query, rename ESPCN – Quarterly QI – Patients 75+, Seen in the Last Year (Numerator).

** Set as Level 2**
Include patients with a "done" appointments with the Default Doctor in the last 1 year.

ESPCN – Quarterly QI – Patients 75+, Seen in the Last Year (Numerator)

Patients over 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (Appointment In the last 1 Years Doctor:) TESTDone

ESPCN- Quarterly- Chronic Disease Patients, Seen in the Last Year (Numerator)

Copy your Quarterly QI – Active Patients (Denominator) query, rename ESPCN – Quarterly QI – Chronic Disease Patients, Seen in the Last Year (Numerator).

ESPCN - Quarterly QI - Chronic Disease Patients (Denominator)

Patients Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (AH Claim 250
OR AH Claim 401
OR AH Claim 410
OR AH Claim 411
OR AH Claim 412
OR AH Claim 413
OR AH Claim 414
OR AH Claim 420
OR AH Claim 421
OR AH Claim 422
OR AH Claim 423
OR AH Claim 424
OR AH Claim 425
OR AH Claim 426
OR AH Claim 427
OR AH Claim 428
OR AH Claim 429
OR AH Claim 440
OR AH Claim 441
OR AH Claim 491
OR AH Claim 492
OR AH Claim 496
OR AH Claim 585
OR AH Claim 586)
AND (Appointment In the last 1 Years Doctor: TESTDone)

** Set as Level 3**
Include patients with a "done" appointments with the Default Doctor in the last 1 year.

Outreach Queries

ESPCN – Outreach – Adult 18-74 No Appointment in 3 Years

Copy your ESPCN – Quarterly QI – Patients Seen in the Last 3 Years (Numerator) query, rename it ESPCN – Outreach – No Appointment in 3 years. Save. Edit query.

Change the "done" appointment with the default doctor in the last 3 years to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN - Outreach - Adult 18-74 No visit in 3 years

Patients over 18 under 75 Patient of TEST Type:Valid Alberta Patient
AND (Appointment In the last 3 Years Doctor: TESTDone
AND NOT Appointment In the last 3 Months)

ESPCN – Outreach – Peds 0-17 No Appointment in 2 Years

ESPCN – Outreach – 75+, No Appointment in 1 Year

Copy your ESPCN – Quarterly QI – Patients 75+, Seen in the Last Year (Numerator) query, rename it ESPCN – Outreach – 75+, No Appointment in 1 Year. Save. Edit query.

Change the "done" appointment with the default doctor in the last year to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN – Outreach – Chronic Disease, No Appointment in 1 Year

Copy your ESPCN – Quarterly QI – Chronic Disease Patients, Seen in the Last Year (Numerator) query, rename it ESPCN – Outreach – Chronic Disease, No Appointment in 1 Year. Save. Edit query.

ESPCN – Outreach – Chronic Disease, No Appointment in 1 Year

```
Patients over 0 under 75 Patient of TEST Type:Valid
Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term
    Care
AND NOT Patients End Date Reason:Deceased
  AND ( AH Claim  250
    OR  AH Claim  401
    OR  AH Claim  410
    OR  AH Claim  411
    OR  AH Claim  412
    OR  AH Claim  413
    OR  AH Claim  414
    OR  AH Claim  420
    OR  AH Claim  421
    OR  AH Claim  422
    OR  AH Claim  423
    OR  AH Claim  424
    OR  AH Claim  425
    OR  AH Claim  426
    OR  AH Claim  427
    OR  AH Claim  428
    OR  AH Claim  429
    OR  AH Claim  440
    OR  AH Claim  441
    OR  AH Claim  491
    OR  AH Claim  492
    OR  AH Claim  496
    OR  AH Claim  585
    OR  AH Claim  586 )
      AND (  NOT Appointment  In the last 1
             Years  Doctor: TESTDone
      AND    NOT Appointment  In the next 3          )
             Months
```

Line 1 – Change the age range to under 75.

Change the "done" appointment with the default doctor in the last year to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN – Outreach – Pap Due, No Appointment in 1 Year

Copy your ESPCN – Quarterly – Pap Due query. Rename it ESPCN – Outreach – Pap Due, No Appointment in 1 Year. Save. Edit Query.

ESPCN – Outreach – Pap Due, No Appointment in 1 Year

Female Patients over 25 under 70 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND NOT Chart Note: ASaP "Pap_Test" contains 'total hysterectomy' or "Pap_Test" contains 'total vaginal hysterectomy' or "Pap_Test" contains 'total abdominal hysterectomy'
AND NOT Chart Note: ASaP "Pap_Test" contains 'complete hysterectomy' or "Pap_Test" contains 'TAH'
AND NOT Chart Note: Patient History "Surgical_History" contains 'total hysterectomy' or "Surgical_History" contains 'total abdominal hysterectomy' or "Surgical_History" not contains 'total vaginal hysterectomy'
AND NOT Chart Note: Patient History "Surgical_History" contains 'complete hysterectomy' or "Surgical_History" contains 'tah'
AND NOT Problem total hysterectomy
AND NOT Problem total abdominal hysterectomy
AND NOT Problem total vaginal hysterectomy
AND NOT Problem complete hysterectomy
AND NOT Problem tah
AND (NOT Chart Note: ASaP Pap_Date In the last 3 Years
AND NOT Lab Result In the last 3 Years Gynecological Cytology
AND NOT Lab Result In the last 3 Years DKML Cytology Gynecological
AND NOT Lab Result In the last 3 Years Cytology Report; Cervical/Vaginal
AND NOT Scan In the last 3 Years Notes: Gynecological Cytology
AND NOT Scan In the last 3 Years Notes: DKML Cytology Gynecological
AND NOT Scan In the last 3 Years Type: Labs Notes: Pap)
AND (NOT Appointment In the last 1 Years Doctor: TESTDone
AND NOT Appointment In the next 3 Months)

Set as Level 3

Change the "done" appointment with the default doctor in the last year to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN – Outreach – Mammo Due, No Appointment in 1 Year

Copy your ESPCN – Quarterly – Mammo Due query. Rename it ESPCN – Outreach – Mammo Due, No Appointment in 1 Year. Save. Edit Query.

Set as Level 3

Change the "done" appointment with the default doctor in the last year to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN – Outreach – Mammo Due, No Appointment in 1 Year

Female Patients over 45 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (NOT Chart Note: ASaP Mammogram_Date In the last 2 Years
AND NOT Lab Result In the last 2 Years mammo
AND NOT Scan In the last 2 Years Type: Mammogram
AND NOT Scan In the last 2 Years Notes: mammo)
AND (NOT Appointment In the last 1 Years Doctor: TESTDone
AND NOT Appointment In the next 3 Months)

ESPCN – Outreach – CRC Due, No Appointment in 1 Year

Copy your ESPCN – Quarterly – CRC Due query. Rename it ESPCN – Outreach – CRC Due, No Appointment in 1 Year. Save. Edit Query.

ESPCN – Outreach – CRC Due, No Appointment in 1 Year

Patients over 50 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (NOT Chart Note: ASaP FOBT_FIT_Date In the last 2 Years
AND NOT Chart Note: ASaP Flex_Sig_Date In the last 5 Years
AND NOT Chart Note: ASaP Colonoscopy_Date In the last 10 Years
AND NOT Lab Result In the last 2 Years Immunochemical
AND NOT Lab Result In the last 2 Years Occult Blood (FIT); Stool; Manual
AND NOT Lab Result In the last 5 Years sigmoidoscopy
AND NOT Lab Result In the last 10 Years colonoscopy
AND NOT Scan In the last 2 Years Type: Labs Notes: FIT
AND NOT Scan In the last 2 Years Type: Labs Notes: fecal immunochemical test
AND NOT Scan In the last 5 Years Notes: sigmoidoscopy
AND NOT Scan In the last 10 Years Type: Colonoscopy
AND NOT Scan In the last 10 Years Notes: colonoscopy)
AND (NOT Appointment In the last 1 Years Doctor: TESTDone
AND NOT Appointment In the next 3 Months)

Set as Level 3

Change the "done" appointment with the default doctor in the last year to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN – Outreach – Diabetes Due, No Appointment in 1 Year

Copy your ESPCN – Quarterly – Diabetes Due query. Rename it ESPCN – Outreach – Diabetes Due, No Appointment in 1 Year. Save. Edit Query.

Set as Level 3

Change the "done" appointment with the default doctor in the last year to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN – Outreach – Diabetes Due, No Appointment in 1 Year

Patients over 40 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND (NOT Chart Note: ASaP a1c_date In the last 5 Years
AND NOT Chart Note: ASaP FG_date In the last 5 Years
AND NOT Chart Note: ASaP DRC_date In the last 5 Years
AND NOT Lab Result In the last 5 Years HbA1c/Total Hemoglobin
AND NOT Lab Result In the last 5 Years HbA1c
AND NOT Lab Result In the last 5 Years Glucose Baseline
AND NOT Scan In the last 5 Years Notes: a1c
AND NOT Scan In the last 5 Years Notes: glucose, fasting
AND NOT Scan In the last 5 Years Notes: fasting glucose)
AND (NOT Appointment In the last 1 Years Doctor: TESTDone
AND NOT Appointment In the next 3 Months)

ESPCN – Outreach – Lipids Due, No Appointment in 1 Year

Copy your ESPCN – Quarterly – Lipids Due query. Rename it ESPCN – Outreach – Lipids Due, No Appointment in 1 Year. Save. Edit Query.

Set as Level 3

Change the "done" appointment with the default doctor in the last year to a "NOT" line.

Exclude patients with an appointment in the next 3 months.

ESPCN – Outreach – Lipids Due, No Appointment in 1 Year

Patients over 40 under 75 Patient of TEST Type:Valid Alberta Patient
AND NOT Patients End Date Reason:Inactive
AND NOT Patients End Date Reason:Long Term Care
AND NOT Patients End Date Reason:Deceased
AND NOT Medication Crestor Active Rx
AND NOT Medication Lipitor Active Rx
AND NOT Medication Pravachol Active Rx
AND NOT Medication Zocor Active Rx
AND NOT Medication astatin Active Rx
AND (NOT Chart Note: ASaP lipid_date In the last 5 Years
AND NOT Lab Result In the last 5 Years Lipid
AND NOT Lab Result In the last 5 Years Cardiovascular Disease Risk
AND NOT Scan In the last 5 Years Type: Labs Notes: lipid)
AND (NOT Appointment In the last 1 Years Doctor: TESTDone
AND NOT Appointment In the next 3 Months)

Tracking Query

ESPCN – Tracking – Screening Reviewed by PCCA in 1 Week

Line 1: Clients – Set default doctor, select client type: Valid Alberta Patients.

Line 2: Chart Notes – AsaP, Other Date: Screening Reviewed by PCCA in the last 5 days.

ESPCN - Tracking - Screening Reviewed by PCCA in 1 Week

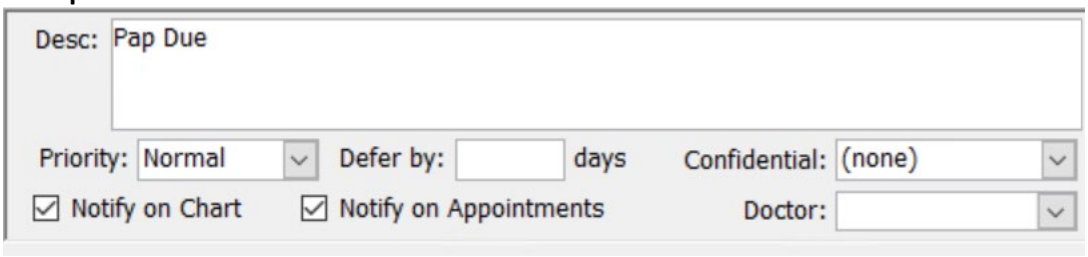
Patients Patient of TEST Type:Valid Alberta Patient

AND Chart Note: ASaP
Screening_Reviewed_by_PCCA In the last 5 Days

Notifications

Copy your ESPCN – Quarterly – Pap Due rename as Pap Due. Check off boxes for Notify on Chart and Notify on Appointments. Duplicate this process for Mammo Due, CRC Due, Diabetes Due, Lipids Due.

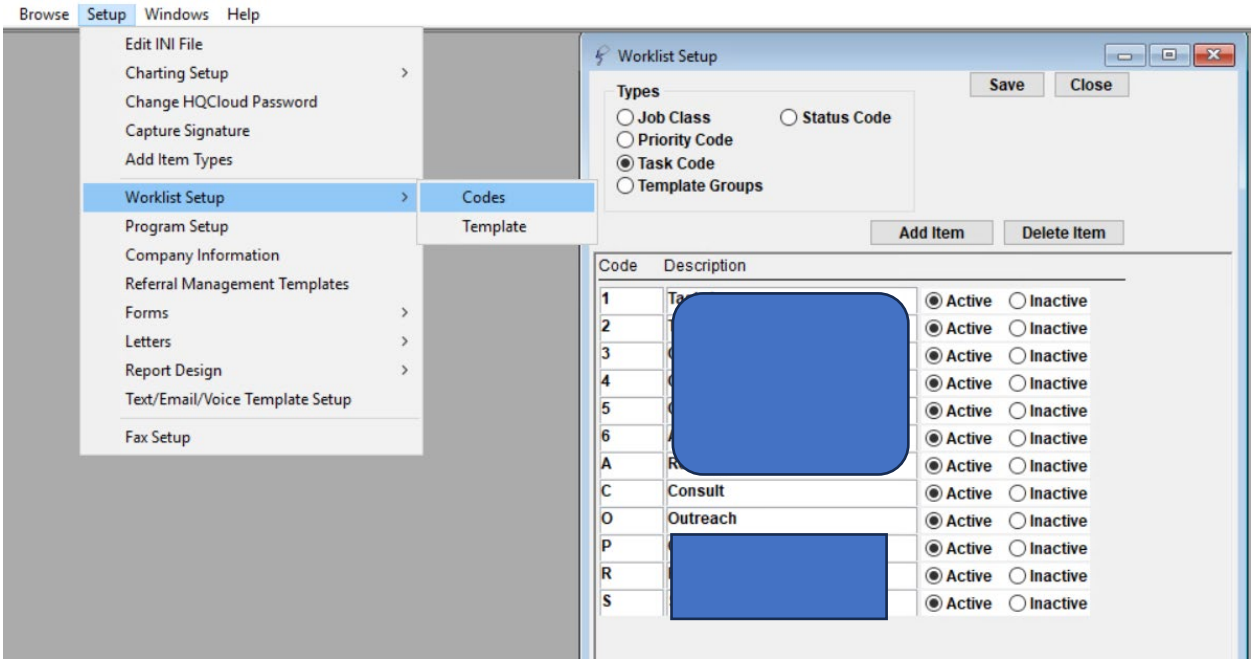
Example:



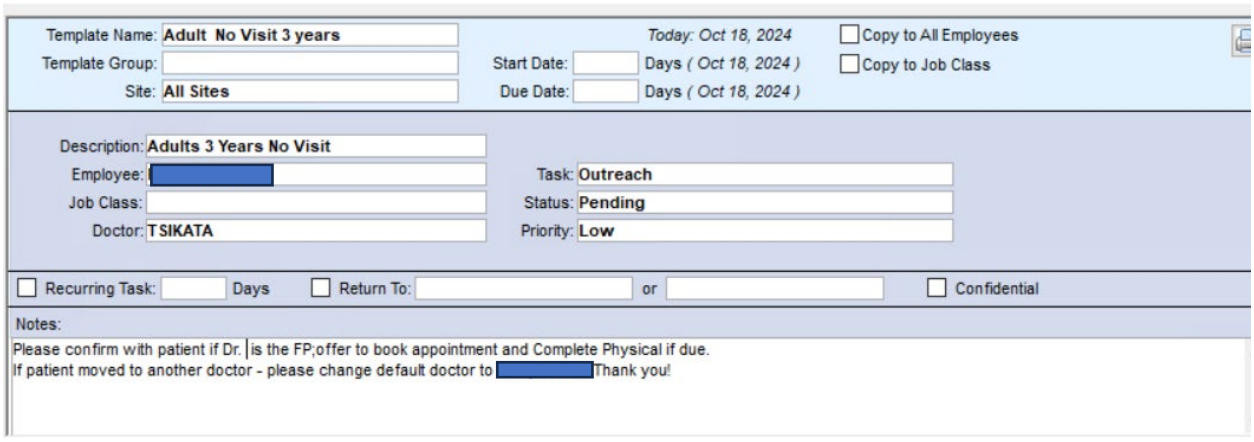
Building Worlist Template

Setup >>Worklist Setup>> Codes >> Task Code

Add a task Code Outreach



Then create worklist templates for the PCCA to use when doing outreach:

Create 5 templates with the task Outreach and the description as follows:

- Adult 3 Years No Visit
- Peds 2 years no visit
- 75 + No visit in one year
- Chronic disease, No visit in 1 year
- Screening outreach