



CHR PCCA Setup

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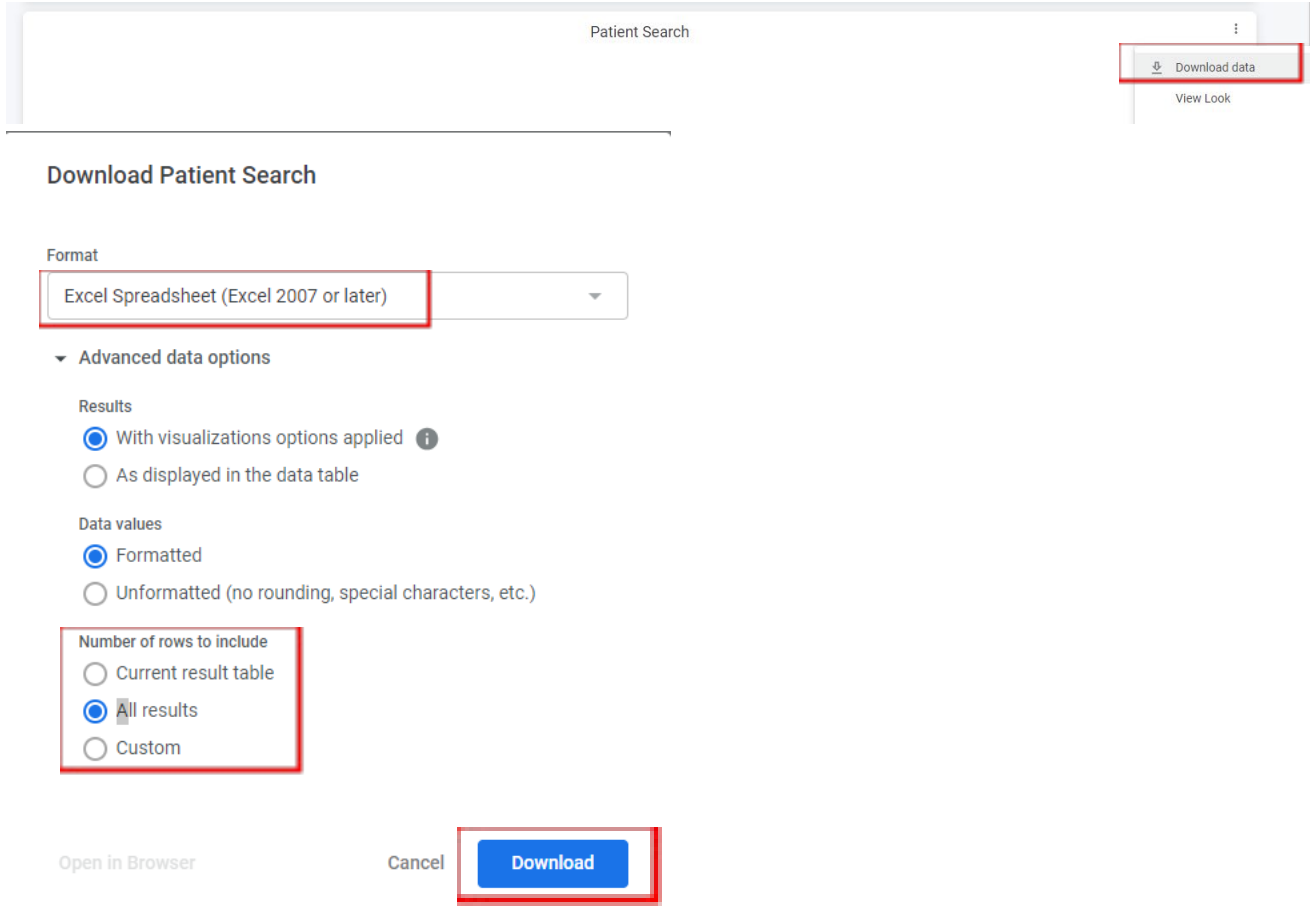
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How to export data

To Export Data

After running patient search, click 3 dots beside patient search. Select download data. Change format to excel, click advanced data options, select number of rows to include = all results.



The screenshot shows the 'Patient Search' interface. In the top right corner, a menu is open with 'Download data' highlighted. Below this, the 'Download Patient Search' dialog is displayed. The 'Format' dropdown is set to 'Excel Spreadsheet (Excel 2007 or later)'. Under 'Advanced data options', the 'Results' section has 'With visualizations options applied' selected. The 'Data values' section has 'Formatted' selected. In the 'Number of rows to include' section, 'All results' is selected. At the bottom, there are buttons for 'Open in Browser', 'Cancel', and 'Download'.

When using Preventive Care Compliance to run reports, for some screens you can just record the values populated in the tables. Other queries, you will export the results and work with them in excel.

To Export Data

After running patient search (not shown), click 3 dots beside patient report. Select download data. Change format to excel, click advanced data options, select number of rows to include = all results.



The screenshot shows the 'Mammography (F, 45-74, 2 Years), Patient Report' interface. A menu is open with 'Download data' highlighted. Other options in the menu include 'Autosize all columns', 'Reset all column widths', 'View', and 'Clear cache & refresh'.

Steps

1. **Run eligible query. Export as excel document.**
2. **Run each screened or due query.** *(depends on using 'contains' or 'doesn't contain' criteria for test results).* **Export as excel document.**
3. **Merge lists and remove duplicates.**
4. **Run exclusion queries as required. Export as excel document.**
5. **Remove charts listed on Exclusion list from Merge List according to the report requirements.**

OUTREACH TEMPLATES

ESPCN – Outreach Pediatric 0-17, No Visit in 2 years (no next appointment)

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags	Status Tag Applied	Status Tags List (Use Contains)	Notification Method
is [redacted]	is any value	is any value	is in range [0, 17]	is Active	is active, and does not contain Deceased or ...	is any time	is any value	is any value
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone	1. Patient Data Field
is any time	is any value	is any value	is before 24 months ago	is any value	is any value	is any value	is any value	is any value

Next Appointment

is null +

ESPCN – Outreach Adult 18-74, No Visit in 3 years (no next appointment)

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags	Status Tag Applied	Status Tags List (Use Contains)	Notification Method
is [redacted]	is any value	is any value	is in range [18, 74]	is Active	is active, and does not contain Deceased or ...	is any time	is any value	is any value
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone	1. Patient Data Field
is any time	is any value	is any value	is before 36 months ago	is any value	is any value	is any value	is any value	is any value

Next Appointment

is null +

ESPCN – Outreach 75+, No Visit in 1 year (no next appointment)

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags	Status Tag Applied	Status Tags List (Use Contains)	Notification Method
is [redacted]	is any value	is any value	is >= 75	is Active	is active, and does not contain Deceased or ...	is any time	is any value	is any value
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone	1. Patient Data Field
is any time	is any value	is any value	is before 12 months ago	is any value	is any value	is any value	is any value	is any value

Next Appointment

is null +

ESPCN - Outreach Chronic Disease, No Visit in 1 Year
(no next appointment)

Patient Search

Primary Physician: is [redacted] Patients ID: is any value Sex: is any value Age: is <= 74 Patient Status: is Active Status Tags: is active, and does not contain Deceased or ... Status Tag Applied: is any time Status Tags List (Use Contains): is any value Notification Method: is any value

Appointment Date: is any time Appointment Location: is any value Appointment Status: is any value Last Appointment: is before 12 months ago Last Appointment Provider: is any value Cell Phone: is any value Email: is any value Home Phone: is any value 1. Patient Data Field: is any value

Next Appointment

is null +

ICD Code

contains

250	401
410	411
412	413
414	420
421	422

+

ICD Code

contains

423	424
425	426
427	428
429	440
441	491

+

ICD Code

contains

429	440
441	491
492	496
585	586

+

ESPCN - Outreach Pap Due, No Visit in 1 year
(no next appointment)

use Pap eligible , merge with List 1 to List 5 > export list to excel

Pap eligible, last appointment is before 12 months ago > export list to excel

The screenshot shows the 'Patient Search' interface with the following filters applied:

- Primary Physician: is [redacted]
- Patients ID: is any value
- Sex: is Female
- Age: is in range [25, 69]
- Patient Status: is Active
- Status Tags: is active, and does not contain Deceased or ...
- Appointment Date: is any time
- Appointment Location: is any value
- Appointment Status: is any value
- Last Appointment: is before 12 months ago
- Last Appointment Provider: is any value
- Cell Phone: is any value
- Email: is any value

Below the filters, the 'Next Appointment' filter is set to 'is null'.

List 1 exclusion – Surgical hx Diagnosis contains ‘Total hysterectomy’ ‘total abdominal hysterectomy’ > export list to excel

The screenshot shows a dropdown menu for the 'Surgical Hx Diagnosis' filter. The dropdown is open, showing a list of terms including:

- L Total Hip Replacement
- L total knee replacement
- Other cystotomy
- Other total cystectomy
- Other Total Hip Replacement
- R Total Knee Replacement
- Total abdominal hysterectomy
- Total Hip Replacement
- Total Hip Replace W Cement
- total hysterectomy
- Total Knee replacement L
- Total Reconstruction Of Breast
- Total splenectomy

The filter is currently set to 'contains' and 'tot'.

List 2 exclusion – File Name contains ‘Total hysterectomy’ ‘total abdominal hysterectomy’) > export list to excel

The screenshot shows a dropdown menu for the 'File Name' filter. The dropdown is open, showing a list of file names including:

- Total Hysterectomy_Bilateral
- Salpingectomy_RAH.pdf

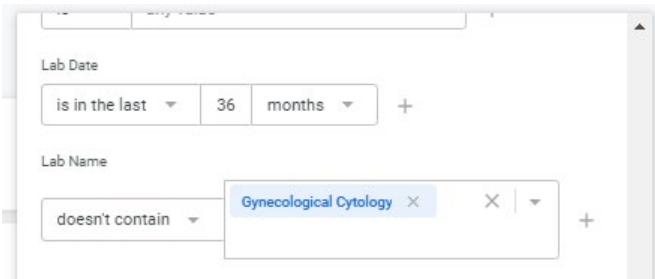
The filter is currently set to 'contains' and 'total hyster'.

List 3 – search ‘Preventive Care Compliance Preventive Care’ (Data source: Patient Data > Preventive Care > Pap Smear > Date) = **with pap results be saved in data source.**

1. Enter Primary Practitioner, Sex, Status Tag, Patient Status
2. Scroll down to Pap Test > (on the right side) Pap Test Patient Report > click the ‘...’, select ‘Download data’
3. Export list to excel

List 4 - search File Name doesn't contains “gyne cyto, cyto gyne, gynecological cytology, cytology gynecological, pap, pap result, pap smear” in the last 36 months > export list to excel.

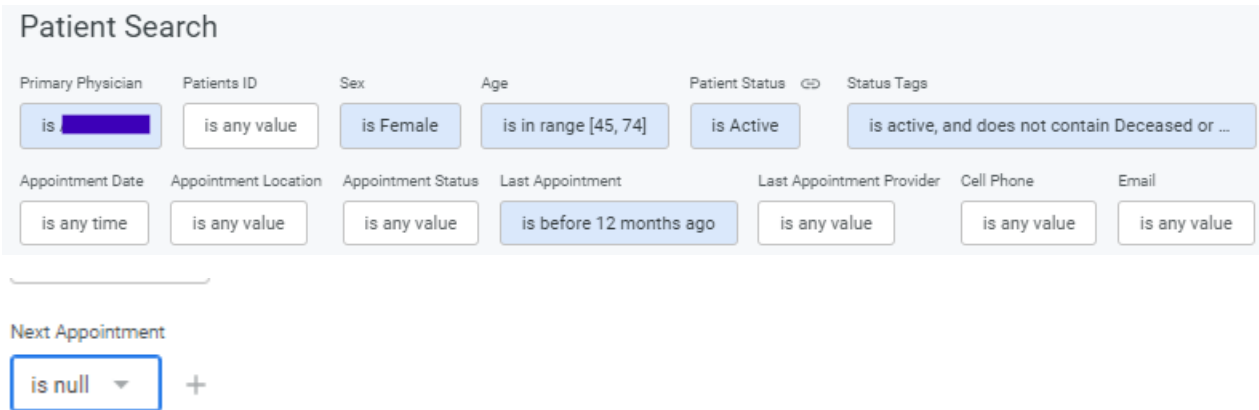
List 5 - search Lab Name doesn't contains "Gynecological Cytology, pap....etc" in the last 36 months > export list to excel.



ESPCN - Outreach Mammo Due, No Visit in 1 year
(no next appointment)

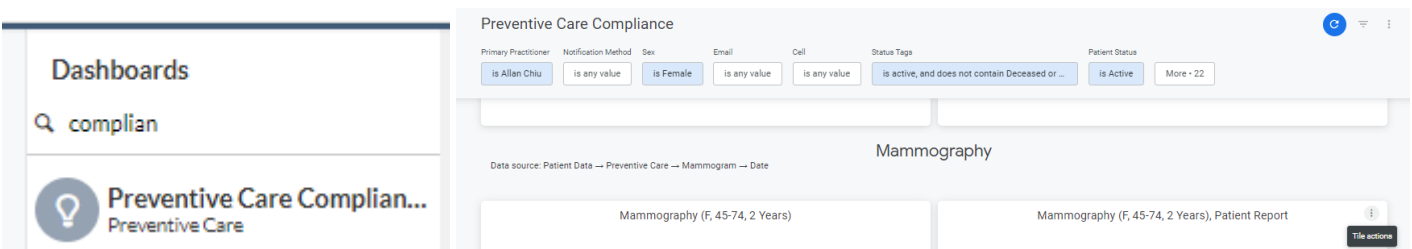
use Mammo eligible , merge with List 1 & List 2 > export list to excel

Mammo eligible, last appointment is before 12 months ago > > export list to excel

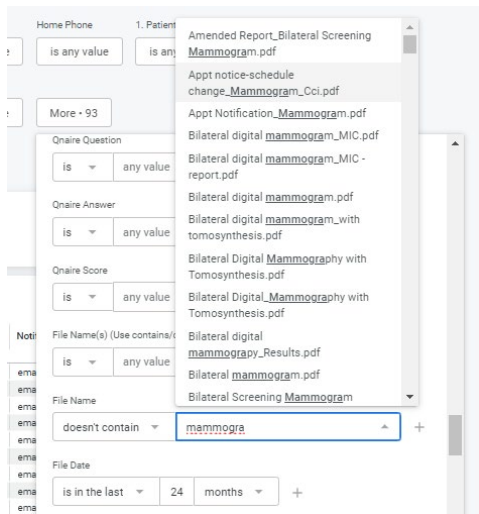


List 1 – search 'Preventive Care Compliance Preventive Care' (Data source: Patient Data > Preventive Care > Mammogram > Date) = **with mammo results be saved in data source.**

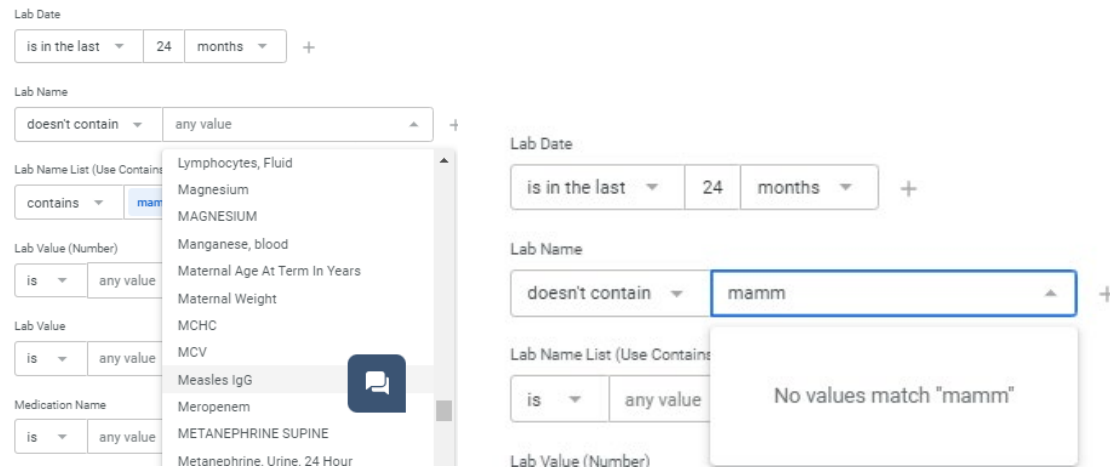
1. Enter Primary Practitioner, Sex, Status Tag, Patient Status
2. Scroll down to Pap Test > (on the right side) Mammography Patient Report > click the '...', select 'Download data'
3. Export list to excel



List 2 - search File Name doesn't contains "mammogram, mammography, mammo...etc" in the last 24 months



***Note: under Lab Name, there's no 'mammogram/mammography' options ; also it doesn't work under 'Lab Name List (use contains)'**



ESPCN - Outreach Lipid Due, No Visit in 1 year (no next appointment)

use Lipid eligible , merge with List 2 and List 3 > export list to excel

Lipid eligible, last appointment is before 12 months ago > export list to excel >

Patient Search

Primary Physician: is [redacted]
 Patients ID: is any value
 Sex: is any value
 Age: is in range [40, 74]
 Patient Status: is Active
 Status Tags: is active, and does not contain Deceased or ...

Appointment Date: is any time
 Appointment Location: is any value
 Appointment Status: is any value
 Last Appointment: is before 12 months ago
 Last Appointment Provider: is any value
 Cell Phone: is any value
 Email: is any value

Next Appointment

is null

Medication Name doesn't contain "crestor, Lipitor, zocor, pravachol, pravastatin, atorvastatin, rosuvastatin, simvastatin" > export list to excel

Medication Name

doesn't contain

- crestor
- lipitor
- zocor
- pravachol
- atorvastatin
- rosuvastatin
- simvastatin

List 2 File Name doesn't contains "LDL Cholesterol, Cholesterol....etc" in the last 5 years > export list to excel

File Name

doesn't contain

ldl

File Date

is in the last 5 years

- HDL_LDL
- LDL
- LDL Cholesterol 2024Aug30.pdf
- LDL Cholesterol 2024May09.pdf
- ldl_eligible.xlsx
- ldl_eligible.xlsx
- ldl_screened#1.xlsx
- ldl_screened#1.xlsx
- ldl_screened#2.xlsx
- ldl_screened#2.xlsx
- Lipid Panel_2.65 LDL (Low Density Lipoprotein Cholesterol)_ordered by Dr Fung.pdf
- Lipid Panel_2.80 LDL (Low Density Lipoprotein Cholesterol).pdf
- Lipid Panel_LDL 1.14 Low Density Lipoprotein Cholesterol_ordered by Dr Elharathi.pdf

List 3 – Lab Name doesn't contains "cholesterol, HDL Cholesterol, LDL Cholesterol, low density lipoprotein cholesterol.....etc in the last 5 years" > export list to excel

The screenshot shows a search filter configuration window with the following fields and values:

- Medical Hx Code: is any value
- Medical Hx Code List (Use Contains): is any value
- Medical Hx Diagnosis List (Use Contains): is any value
- Lab Date: is in the last
- Lab Name: doesn't contain dl
- Lab Name List (Use Contains):

The dropdown menu for the 'Lab Name' filter is open, displaying the following list of items:

- HDL
- HDL Cholesterol
- HDL CHOLESTEROL
- LDL
- LDL, CALCULATED
- LDL Cholesterol
- LDL CHOLESTEROL, CALCULATED
- Non HDL Cholesterol
- NON-HDL CHOLESTEROL
- Total Chol/HDL Ratio
- TOTAL: HDL CHOLESTEROL RATIO

ESPCN - Outreach CRC Due, No Visit in 1 year
(no next appointment)

Use CRC eligible , merge with List 1 to List 5 > export list to excel

CRC eligible, last appointment is before 12 months ago > export list to excel >

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is in range [50, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

Appointment Date: is any time
Appointment Location: is any value
Appointment Status: is any value
Last Appointment: is before 12 months ago
Last Appointment Provider: is any value
Cell Phone: is any value
Email: is any value

Next Appointment: is null

List 1 – Lab Name doesn't contains "Fecal Immunochemical Test, Fecal Immunochemical Test (FIT)" in the last 24 months" > export list to excel

Lab Date: is in the last 24 months

Lab Name: doesn't contain fecal

Lab Date: is in the last 24 months

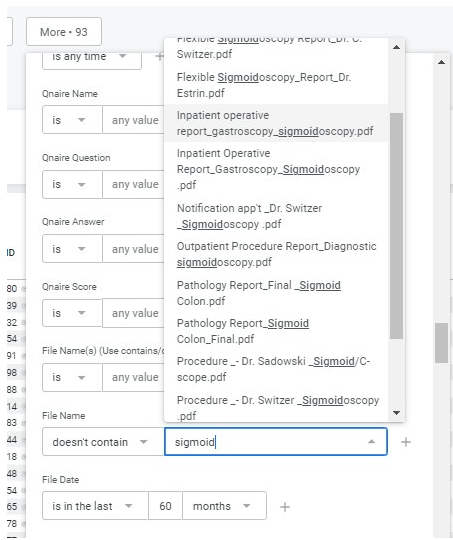
List 2 – File Name doesn't contains "Fecal Immunochemical, FIT...etc in the last 24 months" > export list to excel

File Name(s) (Use contains): is any value

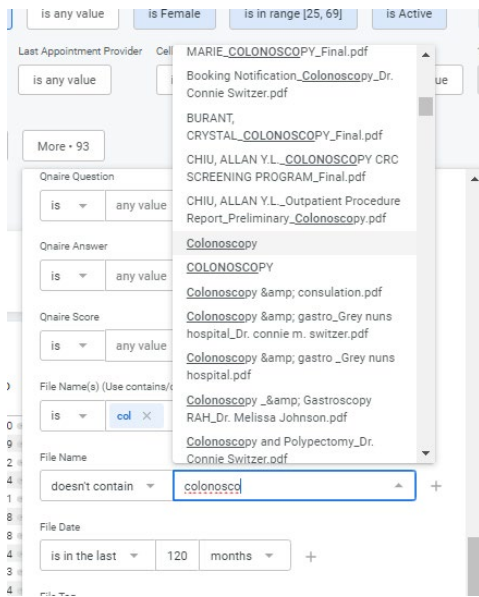
File Name: doesn't contain fecal

File Date: is in the last 24 months

List 3 – File Name doesn't contains "Sigmoidoscopy...etc in the last 60 months" > export list to excel



List 4 – File Name doesn't contains "Colonoscopy...etc in the last 120 months" > export list to excel



List 5 – search ‘Preventive Care Compliance Preventive Care’ (Data source:Patient Data > Preventive Care >1. FIT Test > Date; 2. Flex Sigmoidoscopy > Date; 3. Colonoscopy > Date) = **results saved in data source.**

1. Enter Primary Practitioner, Sex, Status Tag, Patient Status
2. Scroll down to Colorectal Cancer Screen > (on the right side) Colorectal Cancer Screen, Patient Report > click the ‘...’, select ‘Download data’
3. Export list to excel

The screenshot displays the 'Preventive Care Compliance' interface. At the top, there are several filter buttons: 'Primary Practitioner' (set to 'is [redacted]'), 'Notification Method' (set to 'is any value'), 'Sex' (set to 'is any value'), 'Email' (set to 'is any value'), 'Cell' (set to 'is any value'), 'Status Tags' (set to 'is active, and does not contain Deceased or ...'), and 'Patient Status' (set to 'is Active'). A 'More • 22' button is also present. Below the filters, the main content area is titled 'Colorectal Cancer Screen'. Underneath this title, it lists the data source: 'Data source: One of:' followed by three options: '1. Patient Data → Preventive Care → FIT Test → Date (50-74, 2 Years)', '2. Patient Data → Preventive Care → Flex Sigmoidoscopy → Date (50-74, 5 Years)', and '3. Patient Data → Preventive Care → Colonoscopy → Date (50-74, 10 Years)'. The interface shows two data view panes: 'Colorectal Cancer Screen' on the left and 'Colorectal Cancer Screen, Patient Report' on the right. A context menu is open over the right pane, showing options: 'Explore from here', 'Download data', 'Autosize all columns', 'Reset all column widths', 'View', and 'Clear cache & refresh'.

ESPCN - Outreach Diabetes Due, No Visit in 1 year (no next appointment)

use Diabetes eligible, merge with List 1 to List 3 > export list to excel

Diabetes eligible, last appointment is before 12 months ago > export list to excel >

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is >= 40
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

Appointment Date: is any time
Appointment Location: is any value
Appointment Status: is any value
Last Appointment: is before 12 months ago
Last Appointment Provider: is any value
Cell Phone: is any value
Email: is any va

Next Appointment: is null

List 1 - Lab Name doesn't contains "glucose,fasting, glucose,Fasting, GLUCOSE,FASTING, Hemoglobin A1c, HEMOGLOBIN A1C.....etc in the last 60 months" > export list to excel

Lab Name: doesn't contain gluc

- Glucose
- GLUCOSE
- Glucose, 2 hour
- Glucose, 2 Hour
- Glucose, CSF
- GLUCOSE DOSAGE.(G)
- Glucose Drink Dose
- Glucose, fasting
- Glucose, Fasting
- GLUCOSE, FASTING
- Glucose, GDS
- Glucose, random
- Glucose, Random
- GLUCOSE TOLERANCE 1.0H.
- GLUCOSE TOLERANCE 2.0H.
- GLUCOSE TOLERANCE FASTING.
- Glucose Tolerance Interpretation

Lab Date: is in the last 60 months

List 2 – File Name doesn't contains "hemoglobin a1c, hba1c, glucose fasting, fasting....etc" in the last 60 months > export list to excel

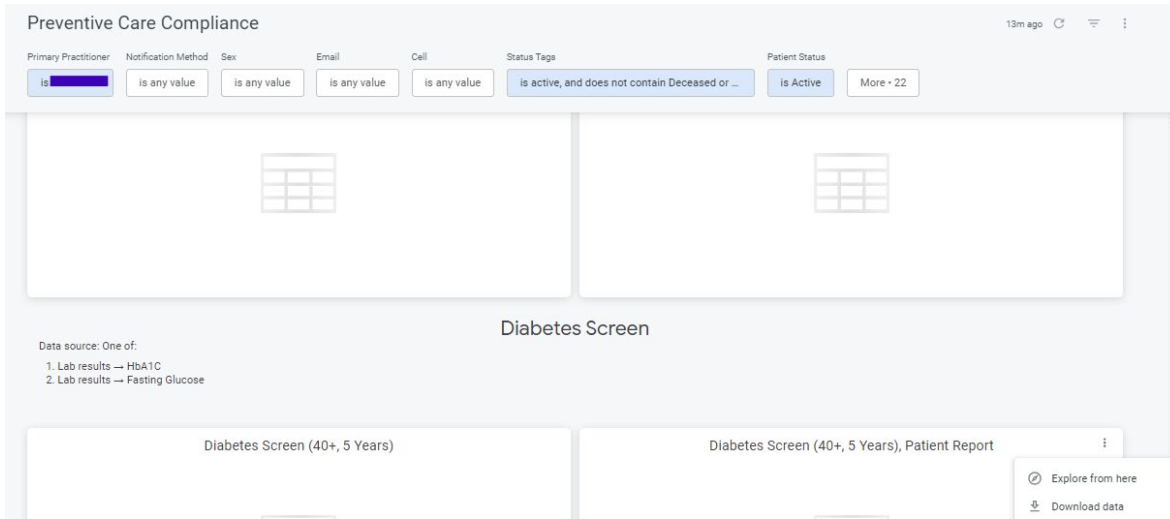
File Name: doesn't contain Hemoglobin A1c

- HEMOGLOBIN A1C (HBA1C)
- HEMOGLOBIN A1C (HBA1C)I25-Hydroxy
- Vitamin DJURINE
- MACROSCOPIC COMPLETE BLOOD

File Date: is in the last 60 months

List 3– search ‘Preventive Care Compliance Preventive Care’ (Data source: Lab results > 1. HbA1c, 2. Fasting Glucose) = results saved in data source.

1. Enter Primary Practitioner, Sex, Status Tag, Patient Status
2. Scroll down to Diabetes Screen > (on the right side) Diabetes Screen, Patient Report > click the ‘...’, select ‘Download data’
3. Export list to excel



ESPCN – Outreach Tracking

Due to the limitation of the EMR system for tracking process, we are currently using manual tracking method.

QUARTERLY REPORTS

ESPCN - QUARTERLY Panel Full

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is any value	is in range [0, 130]	is Active	is active, and does not contain Deceased or ...

ESPCN - QUARTERLY Panel Male

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is Male	is any value	is Active	is active, and does not contain Deceased or ...

ESPCN - QUARTERLY Panel Female

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is Female	is any value	is Active	is active, and does not contain Deceased or ...

ESPCN - QUARTERLY Panel Other

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is Allan Chiu	is any value	is Other	is any value	is Active	is active, and does not contain Deceased or ...

ESPCN - QUARTERLY Panel Age (change the age 'is in range x, x')

- QUARTERLY Panel Age 0-9
- QUARTERLY Panel Age 10-19
- QUARTERLY Panel Age 20-29
- QUARTERLY Panel Age 30-39
- QUARTERLY Panel Age 40-49
- QUARTERLY Panel Age 50-59
- QUARTERLY Panel Age 60-69
- QUARTERLY Panel Age 70-79
- QUARTERLY Panel Age 80-89
- QUARTERLY Panel Age 90+

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is any value	is in range [0, 9]	is Active	is active, and does not contain Deceased or ...

ESPCN – QUARTERLY Lifestyle Exercise Screened

search 'Preventive Care Compliance Preventive Care' (data source: Health Profile > Social History > Lifestyle > physical Activity Updated)

1. Enter Primary Practitioner, Status Tag, Patient Status
2. Scroll down to Exercise Assessment > (on the right side) Exercise Assessment, Patient Report > click the '...', select 'Download data' or 'Explore from here' > sort the 'updated date'
3. Export list to excel

The screenshot shows a dashboard for 'Preventive Care Compliance'. At the top, there are search filters for Primary Practitioner, Notification Method, Sex, Email, Cell, Status Tags, and Patient Status. Below the filters, there are two main sections: 'Exercise Assessment (18+, Annual)' and 'Exercise Assessment (18+, Annual), Patient Report'. The dashboard also includes a 'Filters (17)' section with a complex filter expression and a 'Visualization' section with various chart and table icons. The table below the visualization shows columns for Patient ID / Link, Age, Sex, Primary Practitioner, Updated Date, Months Since Update, and Latest Appointment Date.

ESPCN – QUARTERLY Lifestyle Tobacco Screened

search 'Preventive Care Compliance Preventive Care' (data source: Health Profile > Social History > Substance Use > Smoking Updated)

1. Enter Primary Practitioner, Status Tag, Patient Status
2. Scroll down to Tobacco Use Assessment > (on the right side) Tobacco Assessment, Patient Report > click the '...', select 'Download data' or 'Explore from here' > sort the 'last updated date'
3. Export list to excel

The screenshot shows a dashboard for 'Preventive Care Compliance'. At the top, there are search filters for Primary Practitioner, Notification Method, Sex, Email, Cell, Status Tags, and Patient Status. Below the filters, there are two main sections: 'Tobacco Use Assessment (18+, Annual)' and 'Tobacco Use Assessment (18+, Annual), Patient Report'. The dashboard also includes a 'Filters (17)' section with a complex filter expression and a 'Visualization' section with various chart and table icons. The table below the visualization shows columns for Patient ID / Link, Age, Sex, Primary Practitioner, Updated Date, Months Since Update, and Latest Appointment Date.

ESPCN - QUARTERLY ASaP - BP, Ht/Wt, Exercise, Tobacco Eligible

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is >= 18
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

ESPCN - QUARTERLY ASaP - Ht/Wt Screened

search 'Preventive Care Compliance Preventive Care' (data source: Patient Data > Vitals > Vitals > Height)

1. Enter Primary Practitioner, Status Tag, Patient Status
2. Scroll down to Height > (on the right side) Height, Patient Report > click the '...', select 'Download data' or 'Explore from here' > sort the 'Last Height Date'
3. Export list to excel

Preventive Care Compliance

Primary Practitioner: is [redacted]
Notification Method: is any value
Sex: is any value
Email: is any value
Cell: is any value
Status Tags: is active, and does not contain Deceased or ...
Patient Status: is Active
More: 22

Data source: Patient Data → Vitals → Vitals → Height

Height

Height (18+, Once)		Height (18+, Once), Patient Report			
Patient ID / Link	Age	Sex	Primary Practitioner	Last Height Date	Latest Appointment Date

Filters (15) (Latest Appointment First Last Appointment Start At is before 0 minutes ago AND Latest Appointment First Last Appointment Status is not cancelled or no_show AND Patient Data Fact Sheet Fact...)

Visualization: [Icons]

Columns: Patient ID / Link | Age | Sex | Primary Practitioner | Last Height Date | Latest Appointment Date

search 'Preventive Care Compliance Preventive Care' (data source: Patient Data > Vitals > Vitals > Weight)

1. Enter Primary Practitioner, Status Tag, Patient Status
2. Scroll down to Weight > (on the right side) Weight, Patient Report > click the '...', select 'Download data' or 'Explore from here' > sort the 'Last Weight Date'
3. Export list to excel

Preventive Care Compliance

Primary Practitioner: is [redacted]
Notification Method: is any value
Sex: is any value
Email: is any value
Cell: is any value
Status Tags: is active, and does not contain Deceased or ...
Patient Status: is Active
More: 22

Data source: Patient Data → Vitals → Vitals → Weight

Weight

Weight (18+, 3 Years)		Weight (18+, 3 Years), Patient Report			
Patient ID / Link	Age	Sex	Primary Practitioner	Last Weight Date	Months Since Update

Columns: Patient ID / Link | Age | Sex | Primary Practitioner | Last Weight Date | Months Since Update | Explore from here

ESCPN - QUARTERLY ASaP - BP Screened

search 'Preventive Care Compliance Preventive Care' (data source: Patient Data > Vitals > Blood Pressure > Systolic & diastolic)

1. Enter Primary Practitioner, Status Tag, Patient Status
2. Scroll down to Blood Pressure > (on the right side) BP, Patient Report > click the '...', select 'Download data' or 'Explore from here' > sort the 'Last BP Date'
3. Export list to excel

Preventive Care Compliance

Primary Practitioner: is [redacted] Notification Method: is any value Sex: is any value Email: is any value Cell: is any value Status Tags: is active, and does not contain Deceased or ... Patient Status: is Active More - 22

Data source: Patient Data -> Vitals -> Blood Pressure -> Systolic & Diastolic

Blood Pressure

BP (18+, Annual) | BP (18+, Annual), Patient Report

Patient ID / Link	Age	Sex	Primary Practitioner	Last BP Date	Months Since Update	Latest Appointment Date
-------------------	-----	-----	----------------------	--------------	---------------------	-------------------------

ESPCN - QUARTERLY ASaP - Pap Eligible

use Pap eligible , merge with exclusion (List 1,List 2) > export list to excel

Pap eligible > export list to excel

Patient Search

Primary Physician: is [redacted] Patients ID: is any value Sex: is Female Age: is in range [25, 69] Patient Status: is Active Status Tags: is active, and does not contain Deceased or ... Status Tag Applied: is any time Status Tags List (Use Contains): is any value Notification Method: is any value Appointment Date: is any time

Last Appointment: is any time Last Appointment Provider: is any value Call Phone: is any value Email: is any value Home Phone: is any value 1. Patient Data Field: is any value 1. Patient Data Value (Use Contains): is any value 1. Patient Data Value Numeric: is any value 1. Patient Data Occurred: is any time 2. Patient Data Date Field: is any value 2. Patient Data Date V: is any time

AB Panel Name: is any value More - 93

List 1 exclusion – Surgical hx Diagnosis contains 'Total hysterectomy' 'total abdominal hysterectomy' > export list to excel

More - 93

Notes Important: is any

Notes Private: is any

Surgical Hx Code: is any

Latest Appointment: is before

Surgical Hx Diagnosis: contains tot

- L Total Hip Replacement
- L total knee replacement
- Other cystotomy
- Other total cystectomy
- R Total Knee Replacement
- Total abdominal hysterectomy
- Total Hip Replacement
- Total Hip Replace W Cement
- total hysterectomy
- Total Knee replacement L
- Total Reconstruction Of Breast
- Total splenectomy

List 2 exclusion – File Name contains ‘Total hysterectomy’ ‘total abdominal hysterectomy’) > export list to excel

More • 93

Qnaire Question
is any value +

Qnaire Answer
is any value +

Qnaire Score
is any value +

File Name(s) (Use contains/doesn't contain)
is any

File Name
contains total hyster +

File Date
is any time +

Total Hysterectomy_Bilateral Salpingectomy_RAHA.pdf

ESPCN - QUARTERLY ASaP - Pap Due

use Pap eligible , merge with List 1 to List 5 > export list to excel

Pap eligible > export list to excel

Patient Search

Primary Physician Patients ID Sex Age Patient Status Status Tags

is is any value is any value is in range [25, 69] is Active is active, and does not contain Deceased or ...

List 1 exclusion – Surgical hx Diagnosis contains ‘Total hysterectomy’ ‘total abdominal hysterectomy’) > export list to excel

More • 93

Notes Important
is any

Notes Private
is any

Surgical Hx Code
is any

Latest Appointment
is before +

Surgical Hx Diagnosis
contains tot +

L Total Hip Replacement
L Total knee replacement
Other cystotomy
Other total cystotomy
Other Total Hip Replacement
R Total Knee Replacement
Total abdominal hysterectomy
Total Hip Replacement
Total Hip Replace W Cement
total hysterectomy
Total Knee replacement L
Total Reconstruction Of Breast
Total splenectomy

List 2 exclusion – File Name contains ‘Total hysterectomy’ ‘total abdominal hysterectomy’) > export list to excel

More • 93

Qnaire Question
is any value +

Qnaire Answer
is any value +

Qnaire Score
is any value +

File Name(s) (Use contains/doesn't contain)
is any
Total Hysterectomy_Bilateral
Salpingectomy_RAH.pdf

File Name
contains total hyster +

File Date
is any time +

List 3 - search ‘Preventive Care Noncompliance Preventive Care’ (Data source: Patient Data > Preventive Care > Pap Smear > Date) = **no pap results in the Data source.**

1. Enter Primary Practitioner, Sex, Status Tag, Patient Status
2. Scroll down to Pap Test > sort ‘Last Pap Test Date’ or click the ‘...’, select ‘Download data’
3. Export list to excel

Dashboards

non

Preventive Care Noncom...
Preventive Care

Preventive Care Noncompliant

Primary Practitioner is Notification Method is any value Sex is Female Email is any value Cell is any value Status Tags is active, and does not contain Deceased or ... Patient Status is Active More • 22

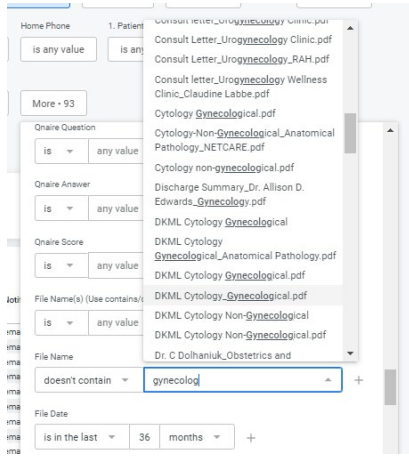
Pap Test (F, 25-69, 3 Years)

Data source: Patient Data → Preventive Care → Pap Smear → Date

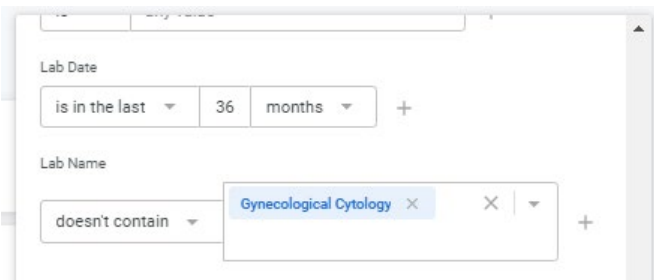
Patient ID / Link Age Primary Practitioner Last Pap Test Date Months Since Update Latest Appointment

Explore from here

List 4 - File Name doesn't contains "gyne cyto, cyto gyne, gynecological cytology, cytology gynecological, pap, pap result, pap smear...etc" in the last 36 months > export list to excel.



List 5 - Lab Name doesn't contains "Gynecological Cytology, pap....etc" in the last 36 months > export list to excel.



ESPCN - QUARTERLY ASaP - Mammo Eligible

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is Female
Age: is in range [45, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

ESPCN – QUARTERLY ASaP - Mammo Due

use Mammo eligible , merge with List 1 & List 2 > export list to excel

[Mammo eligible](#) > *export list to excel*

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is Female
Age: is in range [45, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

List 1 exclusion - search 'Preventive Care Noncompliance Preventive Care' (Data source: Patient Data > Preventive Care > Mammogram > Date) = **no mammogram results in the Data source.**

1. Enter Primary Practitioner, Sex, Status Tag, Patient Status
2. Scroll down to Mammography > sort the 'Last Mammography Date' or click the '...' , select 'Download data'
3. Export list to excel

Dashboards

non

Preventive Care Noncom...
Preventive Care

Preventive Care Noncompliant

Primary Practitioner: is [redacted]
Notification Method: is any value
Sex: is Female
Email: is any value
Cell: is any value
Status Tags: is active, and does not contain Deceased or ...
Patient Status: is Active
More + 22

Mammography (F, 45-74, 2 Years)

Data source: Patient Data → Preventive Care → Mammogram → Date

Patient ID / Link	Age	Primary Practitioner	Last Mammography Date	Months Since Update	Latest Appointment Date
-------------------	-----	----------------------	-----------------------	---------------------	-------------------------

Note: In the original image, the 'Last Mammography Date' column header and a dropdown menu icon in the top right corner are circled in blue.

List 2 - File Name doesn't contain "mammogram, mammography, mammo...etc" in the last 24 months

File Name(s) (Use contains/doesn't contain): doesn't contain Mammogram

File Name: is any value

File Date: is in the last 24 months

***Note: under Lab Name, there's no 'mammogram/mammography' options ; also it doesn't work under 'Lab Name List (use contains/doesn't contain)**

Lab Name: doesn't contain any value

Lab Name List (Use Contains): contains mamm

Lab Date: is in the last 24 months

No values match "mamm"

ESPCN - QUARTERLY ASaP - CRC Eligible

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is in range [50, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

Last Appointment: Last Appointment Provider: Cell Phone: Email: Home Phone: 1. Patient Data Field: 1. Patient Data Value (Use Contains): 1. I

ESPCN - QUARTERLY ASaP - CRC Due

Use CRC eligible , merge with List 1 to List 5 > export list to excel

[CRC eligible](#) > [export list to excel](#) >

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is in range [50, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

Last Appointment: Last Appointment Provider: Cell Phone: Email: Home Phone: 1. Patient Data Field: 1. Patient Data Value (Use Contains): 1. I

[List 1](#) - Lab Name doesn't contains "Fecal Immunochemical Test, Fecal Immunochemical Test (FIT)" in the last 24 months" > [export list to excel](#)

Lab Date: is in the last 24 months

Lab Name: doesn't contain fec

Lab Date: is in the last 24 months

Note: A dropdown menu is open for the Lab Name field, showing "Fecal Immunochemical Test" and "Fecal Immunochemical Test (FIT)".

List 2 - File Name doesn't contains "Fecal Immunochemical, FIT...etc in the last 24 months" > export list to excel

is any value FASTING|IgA|Potassium|Sodium|Bilirubin, Total|Anti-transglutaminase IgA

File Name(s) (Use contains/ is any value FECAL IMMUNOCHEMICAL TEST|FECAL IMMUNOCHEMICAL TEST

File Name Fecal Immunochemical Test (FIT) Fecal

doesn't contain fecal +

File Date is in the last 24 months +

List 3 – File Name doesn't contains "Sigmoidoscopy...etc in the last 60 months" > export list to excel

More + 93

is any time

Qnaire Name is any value

Qnaire Question is any value

Qnaire Answer is any value

Qnaire Score is any value

File Name(s) (Use contains/ is any value

File Name doesn't contain sigmoid +

File Date is in the last 60 months +

List 4 – File Name doesn't contains "Colonoscopy...etc in the last 120 months" > export list to excel

is any value is Female is in range [25, 69] is Active

Last Appointment Provider Cell MARIE_COLONOSCOPY_Final.pdf

is any value Booking Notification_Colonoscopy_Dr. Connie Switzer.pdf

More + 93

Qnaire Question is any value BURANT, CRYSTAL_COLONOSCOPY_Final.pdf

Qnaire Answer is any value CHIU, ALLAN YL_COLONOSCOPY CRC SCREENING PROGRAM_Final.pdf

Qnaire Score is any value CHIU, ALLAN YL_Outpatient Procedure Report_Preliminary_Colonoscopy.pdf

File Name(s) (Use contains/ is col X

File Name doesn't contain colonosco +

File Date is in the last 120 months +

List 5 – search ‘Preventive Care Noncompliance Preventive Care’ (Data source: Patient Data > Preventive Care >1. FIT Test > Date; 2. Flex Sigmoidoscopy > Date; 3. Colonoscopy > Date) = no results saved in data source.

1. Enter Primary Practitioner, Status Tag, Patient Status
2. Scroll down to Colorectal Cancer Screen > sort last FIT Date, Last Flex Sigmoidoscopy Date, Last Colonoscopy Date > click the ‘...’, select ‘Download data’
3. Export list to excel

Preventive Care Noncompliant

Primary Practitioner: is [redacted] Notification Method: is any value Sex: is any value Email: is any value Cell: is any value Status Tags: is active, and does not contain Deceased or ... Patient Status: is Active More: 22

148	24117391	60.0	Allan Chiu	2013-09-17	133	2024-05-18
149	24118992	56.0	Allan Chiu	2011-11-23	154	2024-10-03

Colorectal Cancer Screen

> Data source: One of:
 Patient Data → Preventive Care → FIT Test → Date (50-74, 2 Years)
 Patient Data → Preventive Care → Flex Sigmoidoscopy → Date (50-74, 5 Years)
 Patient Data → Preventive Care → Colonoscopy → Date (50-74, 10 Years)

Patient ID	Age	Sex	Primary Practitioner	Last FIT Date	Months Since FIT Update	Last Flex Sigmoidoscopy Date	Months Since Flex Sigmoidoscopy Update	Last Colonoscopy Date	Months Since Colonoscopy Update	Latest Appointment Date
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ESPCN - QUARTERLY ASaP - Diabetes Eligible

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is >= 40
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

ESPCN - QUARTERLY ASaP - Diabetes Due

use Diabetes eligible, merge with List 1 to List 3 > export list to excel

[Diabetes eligible](#) > [export list to excel](#) >

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is >= 40
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

List 1 – Lab Name doesn't contains "glucose,fasting, glucose,Fasting, GLUCOSE,FASTING, Hemoglobin A1c, HEMOGLOBIN A1C.....etc in the last 60 months" > export list to excel

Lab Name: doesn't contain [gluc]

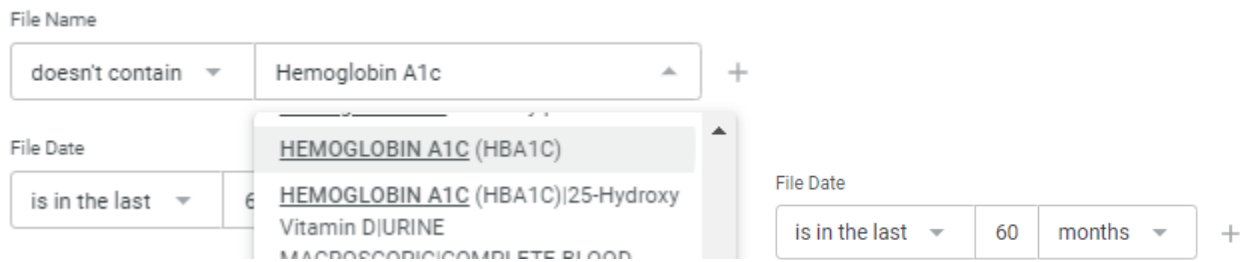
Lab Date: is in the last 60 months

Lab Name dropdown menu items:

- Glucose
- GLUCOSE
- Glucose, 2 hour
- Glucose, 2 Hour
- Glucose, CSF
- GLUCOSE DOSAGE.(G)
- Glucose Drink Dose
- Glucose, fasting
- Glucose, Fasting
- GLUCOSE, FASTING
- Glucose, GDS
- Glucose, random
- Glucose, Random
- GLUCOSE TOLERANCE 1.0H.
- GLUCOSE TOLERANCE 2.0H.
- GLUCOSE TOLERANCE FASTING.
- Glucose Tolerance Interpretation

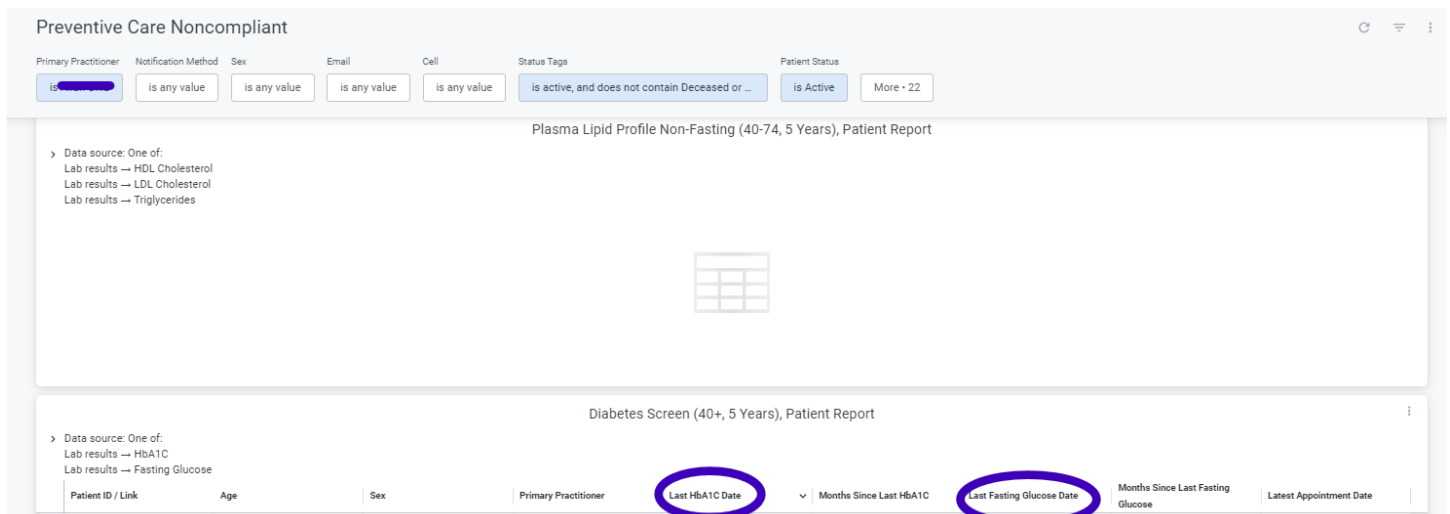
Lab Date: is in the last 60 months +

List 2 – File Name doesn't contains "hemoglobin a1c, hba1c, glucose fasting, fasting....etc" in the last 60 months > export list to excel



List 3– search 'Preventive Care Noncompliance Preventive Care' (Data source: Lab results > 1. HbA1c, 2. Fasting Glucose) = no results saved in data source.

1. Enter Primary Practitioner, Status Tag, Patient Status
2. Scroll down to Diabetes Screen > sort Last HbA1c Date, sort Last Fasting Glucose Date > click the '...', select 'Download data'
3. Export list to excel



ESPCN - QUARTERLY ASaP - Lipids & CV Risk Eligible

Medication Name doesn't contain "crestor, Lipitor, zocor, pravachol, pravastatin, atorvastatin, rosuvastatin, simvastatin"
> export list to excel

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is in range [40, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

Medication Name: doesn't contain

- crestor
- lipitor
- zocor
- pravachol
- atorvastatin
- rosuvastatin
- simvastatin

ESPCN - QUARTERLY ASaP - Lipid Due

use Lipid eligible , merge with List 2 and List 3 > export list to excel

Lipid eligible > export list to excel >

Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is in range [40, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

Medication Name: doesn't contain

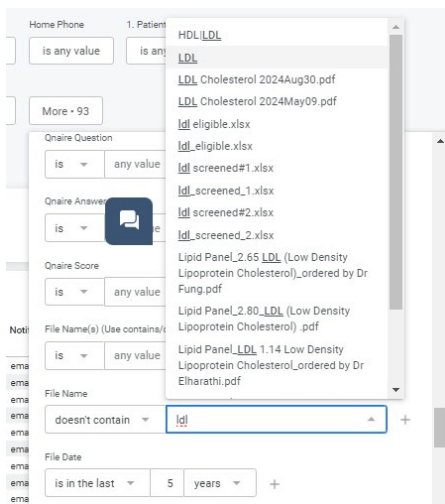
- crestor
- lipitor
- zocor
- pravachol
- atorvastatin
- rosuvastatin
- simvastatin

Medication Name doesn't contain "crestor, Lipitor, zocor, pravachol, pravastatin, atorvastatin, rosuvastatin, simvastatin" > export list to excel

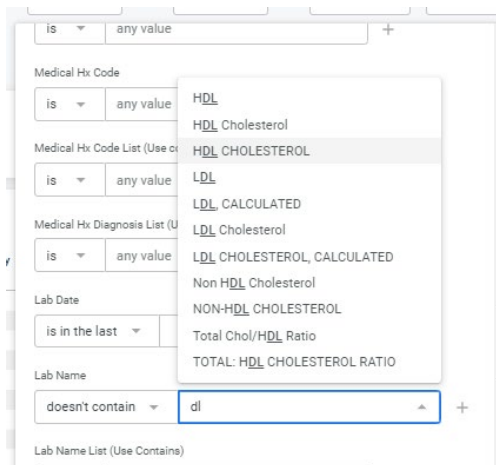
Medication Name: doesn't contain

- crestor
- lipitor
- zocor
- pravachol
- atorvastatin
- rosuvastatin
- simvastatin

List 2 File Name doesn't contains "LDL Cholesterol, Cholesterol....etc" in the last 5 years > export list to excel



List 3 – Lab Name doesn't contains "cholesterol, HDL Cholesterol, LDL Cholesterol, low density lipoprotein cholesterol.....etc in the last 5 years" > export list to excel



ESPCN - QUARTERLY ASaP – CV Risk Due

use CV Risk eligible , merge with List 2 to List 4 > export list to excel

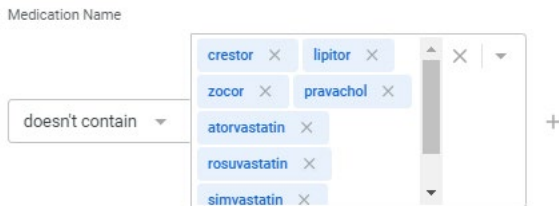
CV Risk eligible > export list to excel >



Patient Search

Primary Physician: is [redacted]
Patients ID: is any value
Sex: is any value
Age: is in range [40, 74]
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...

Medication Name doesn't contain "crestor, Lipitor, zocor, pravachol, pravastatin, atorvastatin, rosuvastatin, simvastatin"
> export list to excel

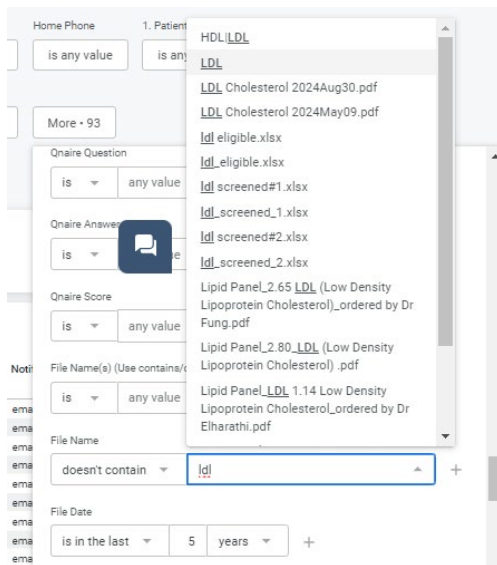


Medication Name

doesn't contain

- crestor
- lipitor
- zocor
- pravachol
- atorvastatin
- rosuvastatin
- simvastatin

List 2 File Name doesn't contain "LDL Cholesterol, Cholesterol....etc" in the last 5 years > export list to excel



Home Phone: is any value
1. Patient: is any value
More: 93
Qnaire Question: is any value
Qnaire Answer: is any value
Qnaire Score: is any value
File Name(s) (Use contains): is any value
File Name: doesn't contain ldl
File Date: is in the last 5 years

- HDL_LDL
- LDL
- LDL Cholesterol 2024Aug30.pdf
- LDL Cholesterol 2024May09.pdf
- ldl_eligible.xlsx
- ldl_eligible.xlsx
- ldl_screened#1.xlsx
- ldl_screened_1.xlsx
- ldl_screened#2.xlsx
- ldl_screened_2.xlsx
- Lipid Panel_2.65 LDL (Low Density Lipoprotein Cholesterol)_ordered by Dr Fung.pdf
- Lipid Panel_2.80 LDL (Low Density Lipoprotein Cholesterol).pdf
- Lipid Panel_LDL 1.14 Low Density Lipoprotein Cholesterol_ordered by Dr Elharathi.pdf

List 3 – File Name doesn't contain "Cardiovascular Disease Assessment, Framingham,.....etc" in the last 60 months > export list to excel

File Name

contains

File Date

is in the last months

List 4 – Lab Name doesn't contains "cholesterol, HDL Cholesterol, LDL Cholesterol, low density lipoprotein cholesterol.....etc in the last 5 years" > export list to excel

is

Medical Hx Code

is

Medical Hx Code List (Use o

is

Medical Hx Diagnosis List (U

is

Lab Date

is in the last

Lab Name

doesn't contain

Lab Name List (Use Contains)

- HDL
- HDL Cholesterol
- HDL CHOLESTEROL
- LDL
- LDL CALCULATED
- LDL Cholesterol
- LDL CHOLESTEROL, CALCULATED
- Non HDL Cholesterol
- NON-HDL CHOLESTEROL
- Total Chol/HDL Ratio
- TOTAL: HDL CHOLESTEROL RATIO

ESPCN - QUARTERLY VR Patients verified in 6 months

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is any value	is any value	is Active	is active, and does not contain Deceased or ...
Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone
is note_signed or visit_completed	is in the last 6 months	is any value	is any value	is any value	is any value

Validated Date

is in the last months +

ESPCN - QUARTERLY Total appointment in last 6 months

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is any value	is any value	is Active	is active, and does not contain Deceased or ...
Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone
is note_signed or visit_completed	is in the last 6 months	is any value	is any value	is any value	is any value

ESPCN - QUARTERLY VR Patients verified in 3 years

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is any value	is any value	is Active	is active, and does not contain Deceased or ...
Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone
is note_signed or visit_completed	is in the last 36 months	is any value	is any value	is any value	is any value

Validated Date

is in the last months +

ESPCN - QUARTERLY Total appointment in last 3 years

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [REDACTED]	is any value	is any value	is any value	is Active	is active, and does not contain Deceased or ...
Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone
is note_signed or visit_completed	is in the last 36 months	is any value	is any value	is any value	is any value

ESPCN - QUARTERLY 75+ seen in 1 year

Patient Search

Primary Physician: is [redacted]
 Patients ID: is any value
 Sex: is any value
 Age: is >= 75
 Patient Status: is Active
 Status Tags: is active, and does not contain Deceased or ...

Appointment Status: is note_signed or visit_completed
 Last Appointment: is in the last 12 months
 Last Appointment Provider: is any value
 Cell Phone: is any value
 Email: is any value
 Home Phone: is any value

ESPCN - QUARTERLY Total panel 75+

Patient Search

Primary Physician: is [redacted]
 Patients ID: is any value
 Sex: is any value
 Age: is >= 75
 Patient Status: is Active
 Status Tags: is active, and does not contain Deceased or ...

ESPCN – QUARTERLY Total Chronic Disease

Patient Search

Primary Physician: is [redacted]
 Patients ID: is any value
 Sex: is any value
 Age: is <= 74
 Patient Status: is Active

Status Tags: is active, and does not contain Deceased or ...
 Status Tag Applied: is any time
 Status Tags List (Use Co): is any value

ICD Code

250	401
410	411
412	413
414	420
421	422

ICD Code

421	422
423	424
425	426
427	428

ICD Code

429	440
441	491
492	496
585	586

ESPCN – QUARTERLY Chronic Disease seen in last 1 year

Patient Search

Primary Physician	Patients ID	Sex	Age	Patient Status	Status Tags
is [redacted]	is any value	is any value	is any value	is Active	is active, and does not contain Deceased or ...
Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone
is note_signed or visit_completed	is before 12 months ago	is any value	is any value	is any value	is any value

ICD Code

is	250 ×	401 ×
	410 ×	411 ×
	412 ×	413 ×
	414 ×	420 ×
	421 ×	422 ×

ICD Code

is	421 ×	422 ×
	423 ×	424 ×
	425 ×	426 ×
	427 ×	428 ×

ICD Code

is	429 ×	440 ×
	441 ×	491 ×
	492 ×	496 ×
	585 ×	586 ×

ESPCN – DM Outcomes

ESPCN – QUARTERLY QI - Patients with Diabetes (Denominator)

Patient Search as of 2024Oct17

Primary Physician: is [REDACTED] Patients ID: is any value Sex: is any value Age: is >= 18 Patient Status: is Active Status Tags: is active, and does not contain Deceased or ... Status Tag Applied: is any time Status Tags List (Use Contains): is any value Notification Method: is any value

Appointment Date: is any time Appointment Location: is any value Appointment Status: is any value Last Appointment: is any time Last Appointment Provider: is any value Cell Phone: is any value Email: is any value Home Phone: is any value 1. Patient Data Field: is any value 1. Patient Data Value (Use Contains): is any value

1. Patient Data Value Numeric: is any value 1. Patient Data Occurred: is any time 2. Patient Data Date Field: is any value 2. Patient Data Date Value: is any time 2. Patient Data Occurred: is any time All Panel Name: is any value [More + 93](#)

ICD Code: is 250

Lab Name: is [Glucose, fasting; Glucose, Fasting; GLUCOSE, FASTING]

OR is [Hemoglobin A1c; Hemoglobin A1C; HEMOGLOBIN A1C; Hemoglobin A1C (HBA...; HEMOGLOBIN A1C (H...]

Lab Name List (Use Contains): is any value

Lab Value (Number): is >= 7

OR is >= 6.5

ESPCN – QUARTERLY QI – Patients with Diabetes w/ an A1c in 6 Months (Numerator)

Patient Search as of 2024Oct17

Primary Physician	Patient ID	Sex	Age	Patient Status	Status Tags	Status Tag Applied	Status Tags List (Use Contains)	Notification Method	
is Allen Chiu	is any value	is any value	is >= 18	is Active	is active, and does not contain Deceased or ...	is any time	is any value	is any value	
Appointment Date	Appointment Location	Appointment Status	Last Appointment	Last Appointment Provider	Cell Phone	Email	Home Phone	1. Patient Data Field	1. Patient Data Value (Use Contains)
is any time	is any value	is any value	is any time	is any value	is any value	is any value	is any value	is any value	is any value
1. Patient Data Value Numeric	1. Patient Data Occurred	2. Patient Data Date Field	2. Patient Data Date Value	2. Patient Data Occurred	AB Panel Name				
is any value	is any time	is any value	is any time	is any time	is any value	More + 93			

ICD Code

is 250

Lab Date

is in the last 6 months

OR is any time

Lab Name

is Hemoglobin A1C
HEMOGLOBIN A1C
Hemoglobin A1C (HBA...
HEMOGLOBIN A1C (H...

OR is Glucose, fasting
Glucose, Fasting
GLUCOSE, FASTING

Lab Name List (Use Contains)

is any value

Lab Value (Number)

is >= 6.5

OR is >= 7

ESPCN – QUARTERLY QI - Patients with Diabetes with a DFE in the Last Year (numerator)

Patient Search as of 2024Oct17

Primary Physician: is Allan Chiu
Patients ID: is any value
Sex: is any value
Age: is >= 18
Patient Status: is Active
Status Tags: is active, and does not contain Deceased or ...
Status Tag Applied: is any time
Status Tags List (Use Contains): is any value
Notification Method: is any value

Appointment Date: is any time
Appointment Location: is any value
Appointment Status: is any value
Last Appointment: is any time
Last Appointment Provider: is any value
Cell Phone: is any value
Email: is any value
Home Phone: is any value
1. Patient Data Field: is any value
1. Patient Data Value (Use Contains): is any value

1. Patient Data Value Numeric: is any value
1. Patient Data Occurred: is any time
2. Patient Data Date Field: is any value
2. Patient Data Date Value: is any time
2. Patient Data Occurred: is any time
All Panel Name: is any value
[More > 93](#)

ICD Code

is 250

Lab Date

is in the last 6 months

OR is any time

Lab Name

is Hemoglobin A1C
HEMOGLOBIN A1C
Hemoglobin A1C (HBA...
HEMOGLOBIN A1C (H...

OR is Glucose, fasting
Glucose, Fasting
GLUCOSE, FASTING

Lab Name List (Use Contains)

is any value

Lab Value (Number)

is >= 6.5

OR is >= 7

