

# New Reports

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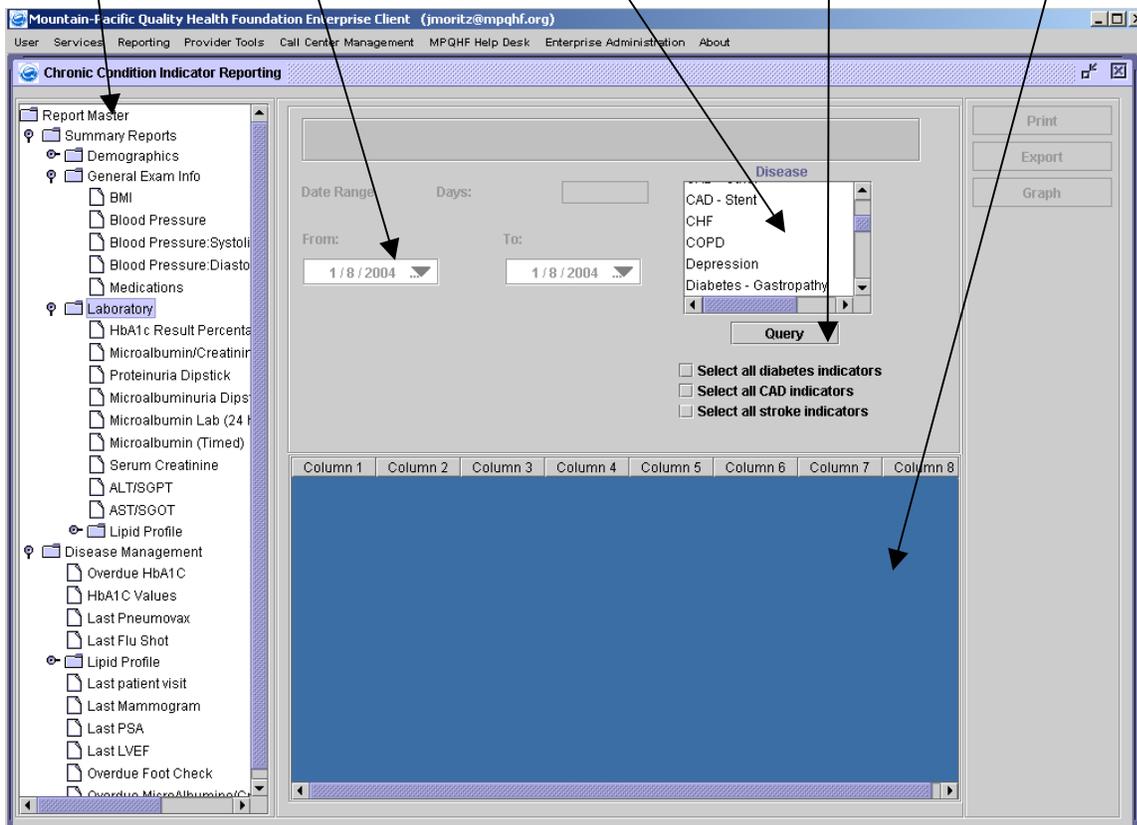
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## Chronic Condition Indicator Reports

A tree view on the left of your screen displays categories and reports (see screen print below). Select a category, then select a report. Once you have selected a report, you select criteria for the report, including:

- Date range or number of days. In summary reports, for both the From and To fields, a calendar drops down for you to select a date. In patient list reports, you instead enter a number of days.
- Disease diagnoses you want to include. To select any diagnoses (i.e., patients with no, some, or all diagnoses), leave the selection blank. To select multiple diagnoses, hold down the CTRL button while clicking. To automatically select a group of diagnoses, click one of the check-boxes (Diabetes, Coronary Artery Disease (CAD), or Stroke) beneath the list.
- Other criteria, such as a cutoff value, depending on the report.

1. Select a category and then a report.
2. Select a date range. Other criteria may also display in this area.
3. Select disease(s).
4. Click the Query button.
5. Results display below.



For each of the reports, after you identify your criteria, click the Query button to generate the report. The report displays at the bottom of your screen. If it is too wide for your screen, you can use the horizontal scroll bar to view the rest of it. You can also re-size the columns to squeeze it onto the page.

The reports are described by category below. Some reports summarize percentages of patients with certain characteristics. In these cases, the report returns both a number and the percentage of the total that number represents. Other reports return lists of patients that meet the criteria. In these cases, the report returns the name, address, and other information that you can export to a mailing list. All reports measure only alive, active patients within a practice group.

To print, click the Print button. A preview window will display what the printed report will look like. (The printed report may have fewer columns than the one on the screen, so that each record can fit on a single page.) From there you can print to the default printer.

To export to a file, click the Export button. The system will create a .csv file that you can open in Microsoft Excel. "csv" stands for "comma-separated values": this is the format the software needs to use to communicate with Excel. Excel can always open .csv files, so don't type any other extension in the file name. Your best choice may be to type no extension at all ("filename"), since the software will automatically add a .csv ("filename.csv").

For the reports that generate lists of patients, you can use the exported file to generate a letter and mailing labels. If you want to identify patients who appear on multiple reports, you can generate several reports, later combine them into a single spreadsheet, and then sort by patient name.

## **Demographics**

### **Number of patient visits within a date range**

**Purpose:** To summarize patients by the number of visits over a date range you specify. Use this report to determine how often you are seeing patients with chronic diseases. This report can also flag issues of concern such as patients who have had zero visits in the past year.

The report presents the total number of patients and average number of visits per patient, and a breakdown of results across the following value ranges:

- Zero visits
- 1-2 visits
- 3-5 visits
- 6 or more visits

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have visited more than one physician, the sum of all patients may add up to more than the total for the provider group.

## **General Exam Info**

### **BMI values within a date range**

**Purpose:** To summarize the results of BMI (Body-Mass Index) calculations across a date range you specify. Use this report to get a distribution of obesity levels for your patients.

The report presents the total number of patients who have had BMI calculated (counting the number of patients, not the number of tests) and a breakdown of results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- 24 and under
- 25 to 29
- 30 and over

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a BMI calculated by more than one physician, the sum of all patients may add up to more than the total for the provider group.

### **Blood pressure values within a date range**

**Purpose:** To summarize the results of blood pressure checks across a date range you specify. Use this report to get a distribution of hypertension levels for your patients.

The report presents the total number of patients who have had their blood pressure checked (counting the number of patients, not the number of tests), the average systolic and diastolic values across all tests (including multiple tests for the same patient), and a breakdown of results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- Greater than or equal to 135/85
- Greater than or equal to 140/90 (this is the old standard, presented for comparison)
- Less than 135/85

Note that the columns don't necessarily show 100% of the test results since they report, for example, patient results where systolic was  $\geq 135$  **and** diastolic was  $\geq 85$ . A blood pressure of **132/85** would not show up in any of these columns.

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have visited more than one physician, the sum of all patients may add up to more than the total for the provider group.

### **Blood pressure systolic values within a date range**

**Purpose:** To summarize the results of blood pressure checks across a date range you specify. Use this report to get a distribution of hypertension levels for your patients.

The report presents the total number of patients who have had their blood pressure checked (counting the number of patients, not the number of tests), the average systolic value across all tests (including multiple tests for the same patient), and a breakdown of systolic results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- Less than 80
- 81-90
- 91-100
- 101-110
- 111-120
- 121-130
- 131-140
- 141-150
- 151-160
- 161-170
- 171-180
- 181-190
- Greater than 191

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have visited more than one physician, the sum of all patients may add up to more than the total for the provider group.

### **Blood pressure diastolic values within a date range**

**Purpose:** To summarize the results of blood pressure checks across a date range you specify. Use this report to get a distribution of hypertension levels for your patients.

The report presents the total number of patients who have had their blood pressure checked (counting the number of patients, not the number of tests), the average diastolic values across all tests (including multiple tests for the same patient), and a breakdown of diastolic results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- Less than 40
- 41-50

- 51-60
- 61-70
- 71-80
- 81-90
- 91-100
- 101-110
- Greater than 111

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have visited more than one physician, the sum of all patients may add up to more than the total for the provider group.

## **Disease Management**

### **Ptns with last LVEF more than xx days ago**

**Purpose:** To present a list of patients who have not had an LVEF done within the number of days you specify. For example, you may want to see if any CAD or heart failure patients have not had an LVEF in the last two years.

For each patient, the report presents the patient's name, age, and most recent LVEF result. It does not list patients who have *never* had an LVEF.

### **Ptns with last HbA1C test value more than xx**

**Purpose:** To present a list of patients whose last HbA1C test value was greater than an amount you specify, across a date range you specify. Use this report to identify patients who are having particular problems controlling their diabetes.

For each patient, the report presents the patient's name, age, and most recent HbA1C test value. It does not list patients who have *never* had an HbA1C test, nor does it list test results that were not numeric.

### **Ptns with last visit more than xx days ago**

**Purpose:** To present a list of patients who have not had a visit within the number of days you specify. If you like to see patients every six months, or every 12 months, this report can identify patients who are overdue for a visit.

For each patient, the report presents the patient's name, age, and the date of that patient's last visit. It does not list patients who have *never* had a visit.

### **Ptns with last HbA1C test more than xx days ago**

**Purpose:** To present a list of patients who have not had an HbA1C test performed within the number of days you specify. If you like patients to have an HbA1C test every 90 days, or every six months, this report can identify patients who are overdue for the test.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last HbA1C test. It does not list patients who have *never* had an HbA1C test.

### **Ptns with last Pneumovax more than xx days ago**

**Purpose:** To present a list of patients who have not had a Pneumovax shot within the number of days you specify. If you want patients to have Pneumovax shots every five years, enter 1825 (5 times 365) in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date of that patient's last Pneumovax. If you do not select a diagnosis, the report lists only patients over 65. If you select one or more diagnoses, the report examines patients of all ages with those diagnoses.

**Ptns with last Flu shot more than xx days ago**

**Purpose:** To present a list of patients who have not had a flu shot within the number of days you specify. If you want patients to have a flu shot every year, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date of that patient's last flu shot. The report examines patients regardless of age.

**Ptns with last mammogram more than xx days ago**

**Purpose:** To present a list of patients who have not had a mammogram performed within the number of days you specify. If you want female patients over 40 to have a mammogram every year so as to catch breast cancer, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last mammogram. It lists only female patients over 40 years of age.

**Ptns with last foot check more than xx days ago**

**Purpose:** To present a list of patients who have not had a foot check performed within the number of days you specify. If you want diabetes patients to have a foot check every year, enter 365 in the number of days field and check the Select All Diabetes Indicators box to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last foot check.

**Ptns with last MicroAlbumin/Creatinine more than xx days ago**

**Purpose:** To present a list of patients who have not had a MicroAlbumin/Creatinine test performed within the number of days you specify. If you want patients to have this test performed every year to check if they're spilling protein in urine, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's MicroAlbumin/Creatinine test.

**Ptns with last PSA test more than xx days ago**

**Purpose:** To present a list of patients who have not had a PSA test performed within the number of days you specify. If you want male patients over 50 to have a PSA performed every year to check for prostate cancer, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last PSA test. It lists only male patients over 50 years of age.

**Ptns with last Lipid Profile (total chol) more than xx days ago**

**Purpose:** To present a list of patients who have not had a Lipid Profile (total cholesterol) performed within the number of days you specify. If you want patients to have their cholesterol checked every year, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last Lipid Profile (total cholesterol).

**Ptns with last Lipid Profile (LDL) more than xx days ago**

**Purpose:** To present a list of patients who have not had a Lipid Profile (LDL) performed within the number of days you specify. If you want patients to have their cholesterol checked every year, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last Lipid Profile (LDL). The list excludes patients who had the test performed, but didn't get a result because their triglycerides were too high.

**Ptns with last Lipid Profile (HDL) more than xx days ago**

**Purpose:** To present a list of patients who have not had a Lipid Profile (HDL) performed within the number of days you specify. If you want patients to have their cholesterol checked every year, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last Lipid Profile (HDL).

**Ptns with last Lipid Profile (Triglycerides) more than xx days ago**

**Purpose:** To present a list of patients who have not had a Lipid Profile (Triglycerides) performed within the number of days you specify. If you want patients to have their cholesterol checked every year, enter 365 in the number of days field to list patients who are overdue.

For each patient, the report presents the patient's name, age, and the date and result of that patient's last Lipid Profile (Triglycerides).

**Laboratory Results****HbA1c Values within a date range**

**Purpose:** To summarize the results of HbA1c tests across a date range you specify. Use this report to get a distribution of blood sugar levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests), the average HbA1c value across all tests (including multiple tests for the same patient), and a breakdown of results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- 7.0 and under
- 7.0 to 7.9
- 8.0 to 8.9
- 9.0 to 9.9
- 10.0 and over
- 9.5 and over (this result should be greater than or equal to the one in the previous column -- it's just providing a different cutoff)
- Patients who had two or more tests during the time, and the tests were more than 91 days apart (since most doctors want patients to have these tests every 90 days, this column shows patients who are not following that guideline)

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

**MicroAlbumin/Creatinine Ratio values within a date range**

**Purpose:** To summarize the results of MicroAlbumin/Creatinine ratio tests (as normal and abnormal) across a date range you specify. Use this report to get a snapshot of urine protein levels for your patients.

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The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and the percentage of normal (less than or equal to 30) and abnormal (greater than 30) ratios.

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

**Lipid Profile: Total Cholesterol values within a date range**

**Purpose:** To summarize the results of cholesterol tests across a date range you specify. Use this report to get a snapshot of cholesterol levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests), the average cholesterol value across all tests (including multiple tests for the same patient), and the number of patients with cholesterol values greater than or equal to 200.

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

**Lipid Profile: Triglycerides values within a date range**

**Purpose:** To summarize the results of triglycerides tests across a date range you specify. Use this report to get a snapshot of cholesterol levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests), the average triglycerides value across all tests (including multiple tests for the same patient), and the number of patients with triglycerides values greater than or equal to 200.

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

**Lipid Profile: HDL values within a date range**

**Purpose:** To summarize the results of HDL tests across a date range you specify. Use this report to get a snapshot of cholesterol levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests), the average HDL value across all tests (including multiple tests for the same patient), and the number of patients with HDL values less than or equal to 35.

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

**Lipid Profile: LDL values within a date range**

**Purpose:** To summarize the results of LDL tests across a date range you specify. Use this report to see a distribution of the cholesterol levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests), the average LDL value across all tests (including multiple tests for the same

patient), and a breakdown of results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- Under 100
- 100 to 129
- 130 and over
- Under 130 (this should be the sum of the first two columns, it just provides a quick view)
- Results not reported (percentage of patients who had the test performed but did not get a result because their triglycerides were too high)

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

### **24 Hour Urine Protein values within a date range**

**Purpose:** To present the average urine protein test result for a date range you specify. Use this report to get a snapshot of urine protein levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and the average urine protein value across all tests (including multiple tests for the same patient).

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

### **Urine Protein Dipstick values within a date range**

**Purpose:** To present the percentage of positive and negative urine protein test results for a date range you specify. Use this report to get a snapshot of urine protein levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and a breakdown of results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- Positive (if the data-field began with a *P*, *pos*, *positive*, etc., or *trace*, it was assumed to be a positive result; straight numeric values or those that began with a + sign were ignored)
- Negative (if the data-field began with an *N*, *neg*, *negative*, etc., it was assumed to be a negative result; straight numeric values or those that began with a - sign were ignored)

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

### **Microalbuminuria Dipstick values within a date range**

**Purpose:** To present the percentage of positive and negative Microalbuminuria test results for a date range you specify. Use this report to get a snapshot of urine protein levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and a breakdown of results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- Positive (if the data-field began with a *P*, *pos*, *positive*, etc., or *trace*, it was assumed to be a positive result; straight numeric values or those that began with a + sign were ignored)
- Negative (if the data-field began with an *N*, *neg*, *negative*, etc., it was assumed to be a negative result; straight numeric values or those that began with a - sign were ignored)

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

#### **MicroAlbumin (Timed) values within a date range**

**Purpose:** To present the average MicroAlbumin (Timed) test result for a date range you specify. Use this report to get a snapshot of urine protein levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and the average MicroAlbumin (Timed) value across all tests (including multiple tests for the same patient).

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

#### **Microalbumin (Lab 24 hr)(mg/dl)**

**Purpose:** To present the average MicroAlbumin (Lab 24 hr)(mg/dl) test result for a date range you specify. Use this report to get a snapshot of urine protein levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and the average MicroAlbumin (Lab 24 hr)(mg/dl) value across all tests (including multiple tests for the same patient).

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

#### **Serum Creatinine values within a date range**

**Purpose:** To summarize the results of Serum Creatinine tests across a date range you specify. Since diabetics may be particularly susceptible to kidney problems, use this report to get a distribution of renal insufficiency levels for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and a breakdown of results across the following value ranges (looking at only the most recent result during this date range for any active patient):

- Under 1.5
- 1.5 to 2.5
- Greater than 2.5

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

#### **ALT values within a date range**

**Purpose:** To present the average ALT test result for a date range you specify. Use this report to get a snapshot of liver function for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and the average ALT value across all tests (including multiple tests for the same patient).

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.

**AST values within a date range**

**Purpose:** To present the average AST test result for a date range you specify. Use this report to get a snapshot of liver function for your patients.

The report presents the total number of patients who have taken the test (counting the number of patients, not the number of tests) and the average AST value across all tests (including multiple tests for the same patient).

The first row presents results for all providers in the practice, and subsequent rows present results for individual physicians in the practice. Because patients may have a procedure performed by more than one physician, the sum of all patients may add up to more than the total for the provider group.