

# CPCI User Training

Friday, February 27, 2015

Greg Augustine, Azara Healthcare

# Agenda

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- How to Log In
- The Home Screen
- General Navigation
- Reports vs. Measures
- Compliance Reports
- The Measures Analyzer
- Clinical Registry Reports
- Patient Visit Planning
- Help

# Logging In


- Launch a web browser and in the address field enter:  
<https://drvs.azarahealthcare.com/<ctr abbrev>>
- At the Log In Screen enter the following
  - Company Code: CHCANYS
    - Defaults and is grayed out with respect to entry
  - User Name: <email address>
  - Password: <password>
    - The first time you login you will need to use the password supplied in your “Welcome email” and you will be required to change your password

The image shows two side-by-side screenshots of the Azara Healthcare web application interface. Screenshot (a) is the 'Log In' screen, featuring the Azara Healthcare logo at the top. Below the logo is a 'Log In' form with three input fields: 'Company Code' (containing 'DEMO'), 'User Name' (containing a blurred email address), and 'Password' (containing a series of dots). A 'LOG IN' button is positioned at the bottom right of the form, and a 'Forgot Password' link is at the bottom left. Screenshot (b) is the 'Modify Password' screen. It displays a red warning message: 'Welcome [blurred name] !! For security reasons, kindly change your password and set your password security answer. Please choose a new password with a minimum of eight characters, one number, and one special character. Password are case sensitive and should not contain spaces. Your new password must be different from the old one.' Below the message are four input fields: 'Company Code', 'User Name', 'Old Password', and 'New Password'. There are also fields for 'Confirm Password' and 'Security Question' (a dropdown menu with '-Select-' selected), and a 'Security Answer' field. A 'Save' button is located at the bottom right of the form.

# Logging In – Welcome Email

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**You will receive an email with your login credentials**

 **Welcome to DRVS!**  
AzaraDRVSAdmin@azarahealthcare.com  
Sent: Saturday, May 5, 2012 11:01 AM  
To: Greg Augustine

**Welcome to Azara DRVS**

Your user credentials :

Company Code: CHCANYS  
UserName: [Greg.augustine@azarahealthcare.com](mailto:Greg.augustine@azarahealthcare.com)  
New Password Code: |![]LB5G

**NOTE:**

This is a temporary password. You are required to change your password once you log in.

Thanks, Azara Healthcare

# The Home Screen

After logging into CPCI, the Home Screen is displayed. There are four (4) main sections on this page.

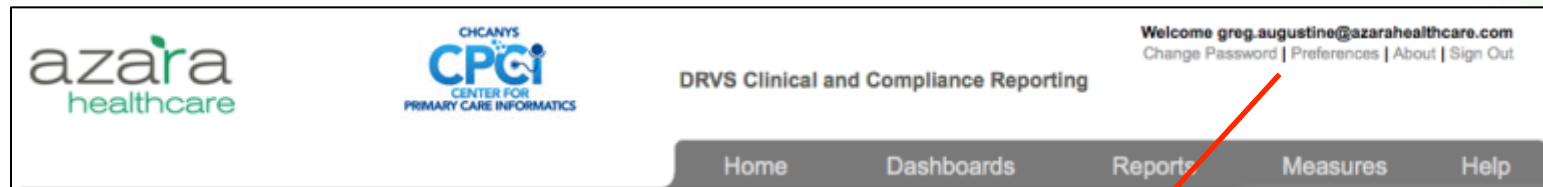
The screenshot shows the Azara Healthcare Home Screen. At the top left is the Azara Healthcare logo. In the center is the CPCI logo (CHCANY'S CENTER FOR PRIMARY CARE INFORMATICS). At the top right, it says "Welcome greg.augustine@azarahealthcare.com" with links for "Change Password", "Preferences", "About", and "Sign Out". Below the logo is a navigation bar with "Home", "Dashboards", "Reports", "Measures", and "Help". The main content area is divided into four sections, each highlighted with a red callout box:

- 1. Stoplight Panel / Dashboard:** A table titled "Stage 1 Core and Menu Set" with columns for "FULL REPORT" and a status indicator (stoplight). The table lists various reports such as "Core #01: CPOE For Medication Orders", "Core #03: Maintain Problem List", "Core #04: e-Prescribing (eRx)", "Core #05: Active Medication List", "Core #06: Medication Allergy List", "Core #07: Record Demographics", "Core #08: Record Vital Signs", "Core #09: Record Smoking Status", "Core #12: Electronic Copy of Health Information", "Core #13: Clinical Summaries", "MS #02: Clinical Lab Test Results", "MS #04: Patient Reminders", "MS #05: Patient Electronic Access", "MS #06: Patient-specific Education Resources", "MS #07: Medication Reconciliation", and "MS #08: Transition of Care Summary".
- 2. Quick Links:** A section titled "Quick Links" with a sub-section "Quick Links" containing a link for "Adult Preventive" with a red 'x' icon.
- 3. Contact Information:** A section titled "Contact Information" containing "Email Support" (with instructions to use the "Report Issue" button) and "Support Portal" (with instructions to check the status of support tickets).
- 4. Events and Announcements:** A section titled "Events and Announcements" with the text "No events at this time."

1. Stoplight Panel / Dashboard
2. Quick Links
3. Contact Information
4. Events and Announcements

# Home Screen Preferences

Click on the 'Preferences' link below your login to change the Scorecard Widget on your home page

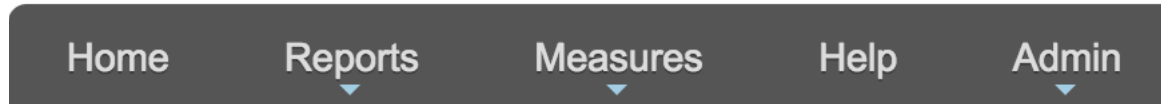


The screenshot shows the "Preferences" settings page. The "User Preferences" section is highlighted with a red box and a red arrow pointing to it from the navigation menu. It contains a "Default Scorecard" dropdown menu currently set to "Adult Diabetes", with "DELETE" and "SUBMIT" buttons next to it. Below this is the "Security Preferences" section, which includes a "Security Question" dropdown set to "Which was your first school?", a "Security Answer" text input field, a "Re-enter password" text input field, and a "SUBMIT" button. A note states: "In order to update your security question and answer, you must re-enter your password."

# Navigation within CPCI

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There are two (2) main tool bars found throughout CPCI



## Main Navigation Bar

- Displayed near the top of all screens
- Useful in navigating through the screens and reports of the application
- Tabs on the main navigation bar give quick access to the **Home** screen, **Reports** menu, **Measures** menu, and **Help** screen



## Utility Bar

- Located below the main navigation bar
- Contains a set of common utility buttons found on most screens or reports
- May vary slightly depending on the type of screen/report
- Common utility buttons include: (Show/Hide) **Filters**, **PDF** (Export), **Excel** (Export), **Report Issue**, and **Add to Favorites**

# Reports and Measures

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Data is presented in CPCI in either a *Report* or the *Measure Analyzer*

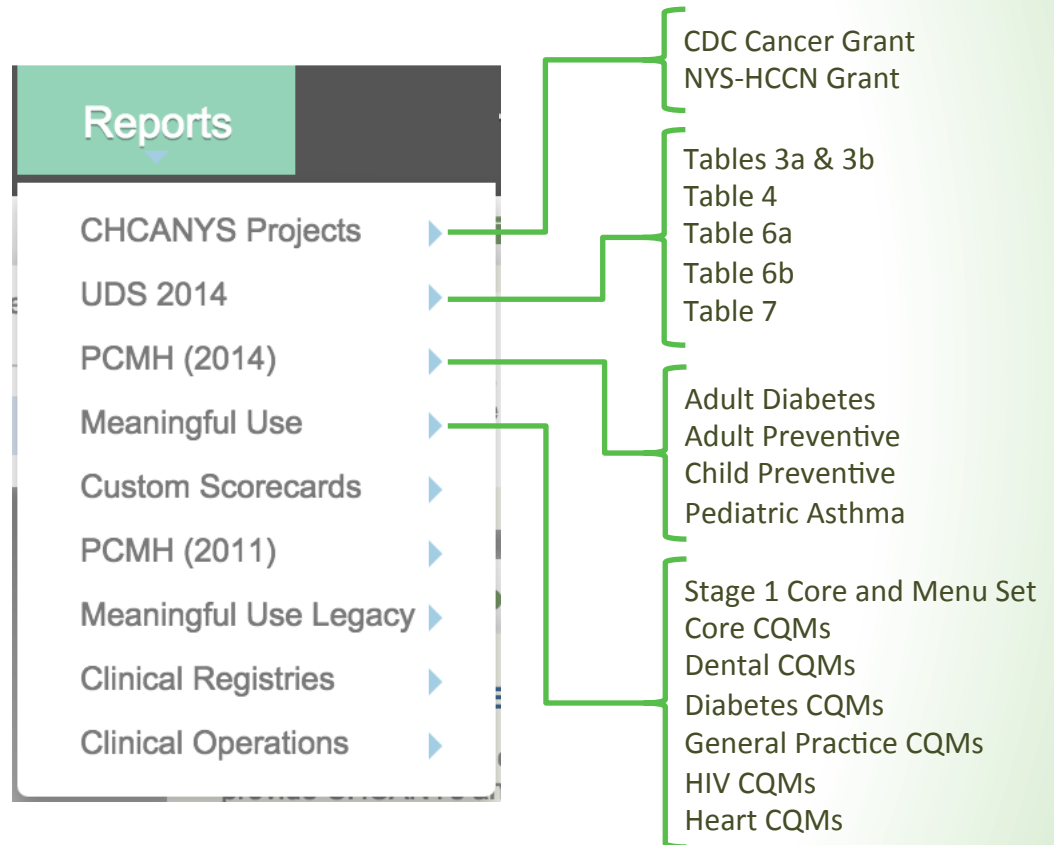
- There are three (3) basic types of **Reports** in CPCI
  - Compliance Reports
    - Aggregated Data for Meaningful Use, UDS, PCMH
  - Clinical Registry Reports
    - Patient Level Detail for specific Chronic Conditions (e.g., Diabetes, Hypertension) or Preventive Care Segments (e.g., Adult Female, Adult Male)
  - Clinical Operations
    - Patient Visit Planning
  
- The **Measure Analyzer** allows users to complete ad-hoc analysis for specific measures (e.g., A1c > 9)
  - Review trends
  - Benchmark providers
  - Identify outliers and disparities in care



# Compliance Reports

## CHCANYS centers currently have access to Compliance Reports for:

- CHCANYS Projects
- UDS
- Meaningful Use
  - Current (2014)
  - *Legacy (2011-13)*
- PCMH
  - Current (2014)
  - *Legacy (2011)*



# Compliance Reports

Compliance reports typically displayed as a Scorecard which includes:

- Measure
- Target (%)
- Numerator
- Exclusions
- Stoplight Grade
- Result (%)
- Denominator

azara healthcare

CHCANY'S CPGI CENTER FOR PRIMARY CARE INFORMATICS

Welcome greg.augustine@azarahealthcare.com  
Change Password | Preferences | About | Sign Out

Home Dashboards Reports Measures Help

**PCMH (MLCHC) - Adult Diabetes, TY January 2013**

Filters PDF EXCEL Report Issue Add to Favorites

| Measure                 | Target | Result | Numerator | Denominator | Exclusions |
|-------------------------|--------|--------|-----------|-------------|------------|
| A1c < 8 (NQF 0575)      | 70%    | 48%    | 1,181     | 2,459       | 4          |
| A1c > 9 (NQF 0059)      | 28%    | 14%    | 332       | 2,459       | 4          |
| A1c Tested              | 89%    | 56%    | 1,368     | 2,459       | 13         |
| BP < 130/80             | 33%    | 62%    | 1,521     | 2,459       | 0          |
| Depression Screening    | 50%    | 0%     | 0         | 2,459       | 4          |
| Eye Exam (NQF 0055)     | 57%    | 44%    | 1,083     | 2,459       | 3          |
| LDL-C < 100 (NQF 0064)  | 46%    | 20%    | 486       | 2,459       | 4          |
| LDL-C Tested (NQF 0064) | 85%    | 42%    | 1,036     | 2,459       | 4          |

























# Compliance Reports

**Consistent tabs, links, and graphics help you easily find the features, functions, and tools you need to easily navigate and use CPCI**

- Measures highlighted in blue are clickable links that allow the ability to drill down into Measure Analyzer
- Information buttons found throughout the system give more specific information about the measure or data
- Supporting detail behind each measure can be directly exported to Excel

**PCMH (MLCHC) - Adult Diabetes, TY January 2013**

Filters | PDF | EXCEL | Report Issue | Add to Favorites

|   | Measure                 |   | Target | Result | Numerator | Denominator | Exclusions |
|---|-------------------------|---|--------|--------|-----------|-------------|------------|
|       | A1c < 8 (NQF 0575)      |    | 70%    | 48%    | 1,181     | 2,459       | 4          |
|   | A1c > 9 (NQF 0059)      |  | 28%    | 14%    | 332       | 2,459       | 4          |
|   | A1c Tested              |  | 89%    | 56%    | 1,368     | 2,459       | 13         |
|   | BP < 130/80             |  | 33%    | 62%    | 1,521     | 2,459       | 0          |
|   | Depression Screening    |  | 50%    | 0%     | 0         | 2,459       | 4          |
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|   | LDL-C Tested (NQF 0064) |  | 85%    | 42%    | 1,036     | 2,459       | 4          |

# Filtering Results

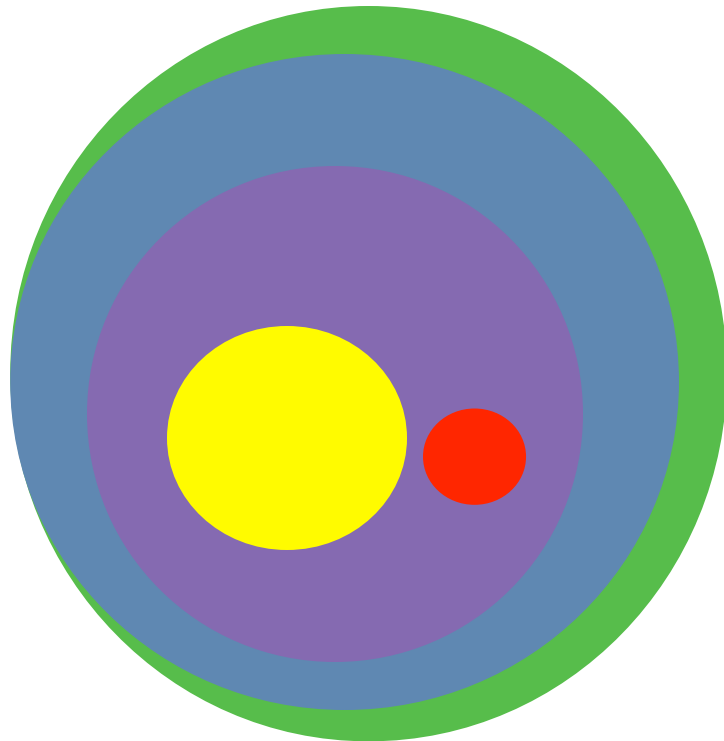
- Results can be filtered based on a period of time, specific providers or specific locations
- To customize your analysis, click **Filters**, choose the filters / parameters, and click the **Update Report** button

The screenshot displays the Azara Healthcare reporting interface. At the top, there is a navigation bar with icons for PDF, EXCEL, Report Issue, and Add to Favorites. A red box highlights the 'Filters' button in the top bar. Below the navigation bar, the interface is divided into several sections:

- Period:** Two dropdown menus. The first is set to 'Trailing Year' and the second to 'TY December 2013'.
- Report Format:** A dropdown menu set to 'Default'.
- Report Grouping:** A dropdown menu set to 'No Grouping'.
- All Providers:** A list of provider names: ADAME, LATASHA; ADCOCK, FRANKIE; ALBRECHT, KAYE; ALLISON, LEONOR; AMBROSE, LUZ; ARNETT, ELINOR; BACA, CLAUDETTE; BARCLAY, IVY; BARFIELD, KRYSTAL. Below this list is a checkbox for 'Show Inactive' which is currently unchecked.
- All Locations:** A list of location addresses: Test Group; 1017 RAVENS BLUFF; 1036 WEST KNOLL ROAD; 1079 RATTLESNAKE HILL ROAD; 1100 ALPINE DRIVE; 1178 PATRIOT DRIVE; 1180 KENDALL STREET; 154 OLD CAMPUS ROAD; 215 STRAWBERRY HILL ROAD.
- Provider Role:** Two radio buttons: 'Usual' (selected) and 'Rendering'.
- UPDATE REPORT:** A button at the bottom center, highlighted with a red box.

# Measure Calculations

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- **Overall Patient Population**  
Total Patients in EPM/EHR
- **Active Patient Population**  
Patients Seen in Last 18 Months
- **Denominator**  
Initial Base Measure Population
- **Numerator**  
Denominator Patients Compliant with Measure
- **Exclusions**  
Patients Removed From the Denominator

**Measure Calculation: Numerator / (Denominator - Exclusions)**

UDS removes exclusions prior to calculation; patient will not be displayed in patient detail reports.

# Reporting Periods

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**There are four (4) main “Period Types” to run a Scorecard Report or individual measure in the Measure Analyzer**

- Year (Calendar)
- Trailing Year
- Quarter
- Month

**Specifications, however, are typically written for a calendar year period.**

# Reporting Period Types

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**All period types follow and adhere to the same specification with regards to**

- The length of the measurement period
- Patient age / gender criteria
- Lookback period for a specific lab, diagnostic image or screening

**Azara applies the specifications the same across all period types within CPCI with the following key differences:**

- Trailing Year
  - The measurement period start and end dates are shifted
    - The period for TY September 2014 is 10/1/13 thru 9/30/14
- Quarter and Month
  - The measurement period start and end dates are shifted
    - The period for Q3 2014 is 7/1/14 thru 9/30/14
  - The patient must have a visit in the quarter (or month) – between 7/1/14 and 9/30/14

# Example: Breast Cancer Screening (MU 2014)

## Denominator:

- Patients at least 42 and no more than 69 years at the end of the measurement period who had an outpatient encounter within the year prior to the end of the measurement period
  - AND who have not had either a bilateral mastectomy or two (2) unilateral mastectomies

## Numerator:

- Pts with a breast cancer screening within 2 years prior to the end of the measurement period

## Application of the specification within DRVS for each period type:

|                     | Year (2015)  | Trailing Year (TY Feb 15)  | Month (Feb 15)   | Quarter (Q1 15)  |
|---------------------|--|--|--|--|
| <u>Period:</u>      | Jan 1, 2015 – Dec 31, 2015   | Mar 1, 2014 – Feb 28, 2015   | Feb 1, 2015 – Feb 28, 2015   | Apr 1, 2014 – Mar 31, 2015   |
| <u>Denominator:</u> | OP Encounter w/in the year prior to 12/31/15<br><b>AND</b><br>Pt at least 42 and not more than 69 as of Dec 31<br><b>AND</b><br>OP Encounter between 1/1/15 and 12/31/15 | OP Encounter w/in the year prior to 2/28/15<br><b>AND</b><br>Pt at least 42 and not more than 69 as of Feb 28<br><b>AND</b><br>OP Encounter between 3/1/14 and 2/28/15 | OP Encounter w/in the year prior to 2/28/15<br><b>AND</b><br>Pt at least 42 and not more than 69 as of Feb 28<br><b>AND</b><br>OP Encounter between 2/1/15 and 2/28/15 | OP Encounter w/in the year prior to 3/31/15<br><b>AND</b><br>Pt at least 42 and not more than 69 as of Mar 31<br><b>AND</b><br>OP Encounter between 1/1/15 and 3/31/15 |
| <u>Exceptions:</u>  | Bilateral Mastectomy or 2 Unilateral Mastectomies at any time prior to 12/31/15  | Bilateral Mastectomy or 2 Unilateral Mastectomies at any time prior to 2/28/15   | Bilateral Mastectomy or 2 Unilateral Mastectomies at any time prior to 2/28/15   | Bilateral Mastectomy or 2 Unilateral Mastectomies at any time prior to 3/31/15   |
| <u>Numerator:</u>   | Screening (Mammography) w/in 2 years prior to 12/31/15   | Screening (Mammography) w/in 2 years prior to 2/28/15  | Screening (Mammography) w/in 2 years prior to 2/28/15  | Screening (Mammography) w/in 2 years prior to 3/31/15  |



# Measure Analyzer

**CHCANYS centers currently have access to a large number of measures across multiple categories**

- CHCANYS Projects
- UDS
- Meaningful Use
  - Current (2014)
  - *Legacy (2011-13)*
- PCMH

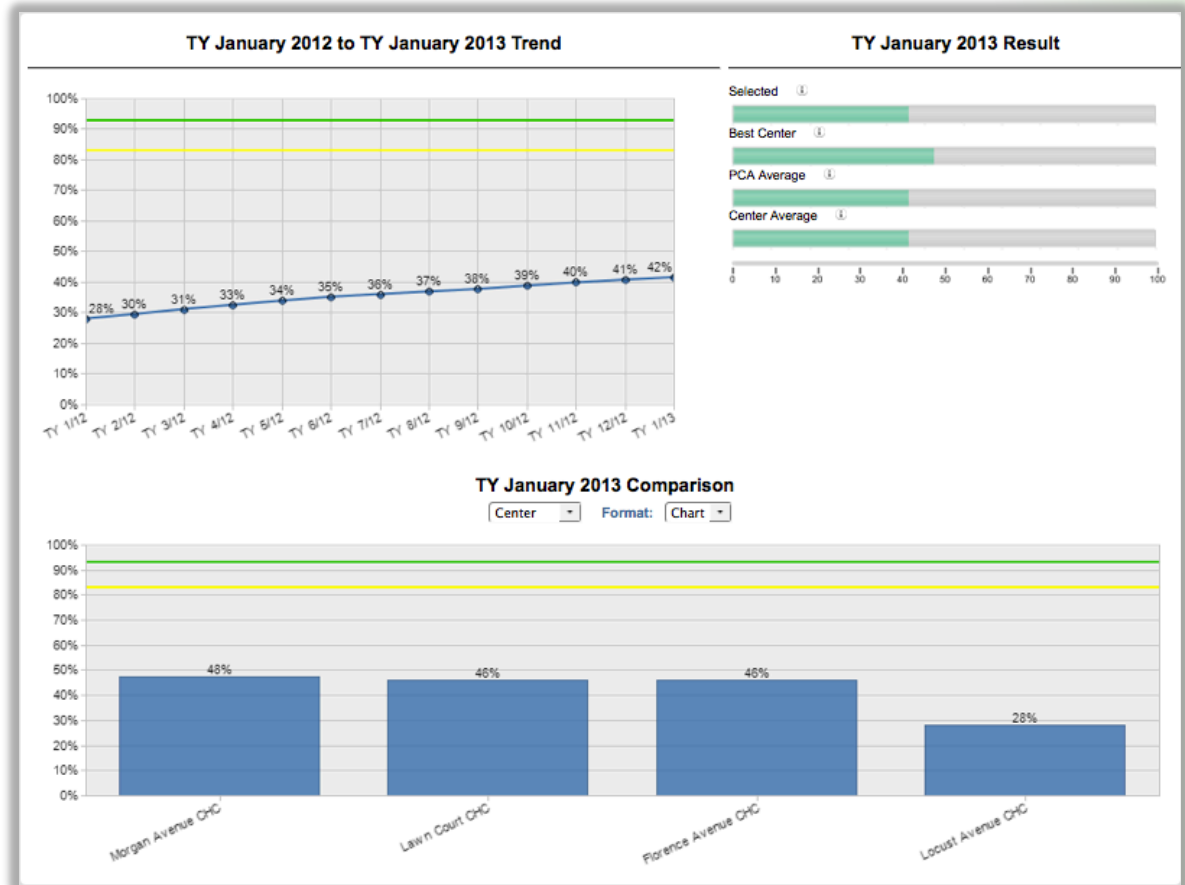
**The Measure Analyzer can be accessed directly from the Main Navigation Bar or by ‘drilling’ into Measures from Scorecard Reports**



# Measure Analyzer

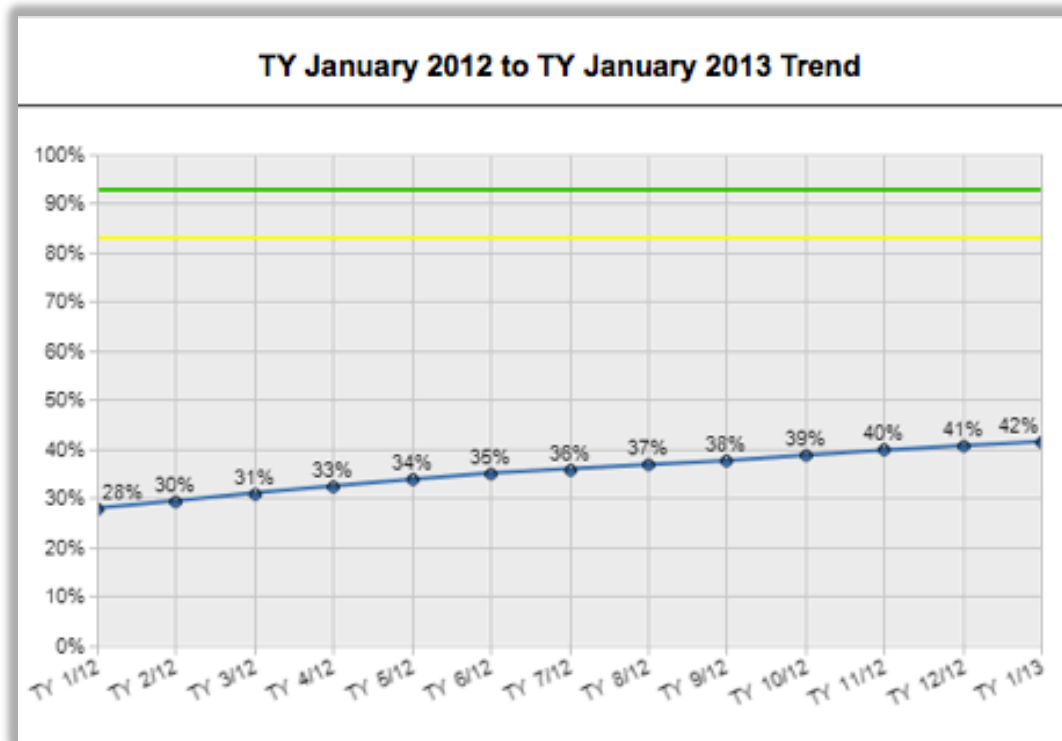
The Measure Analyzer screens contain three (3) graphical components

- Multi-Period Trend
- Current Period Benchmarks
- Current Period Comparisons



# Measure Analyzer – Multi-Period Trend

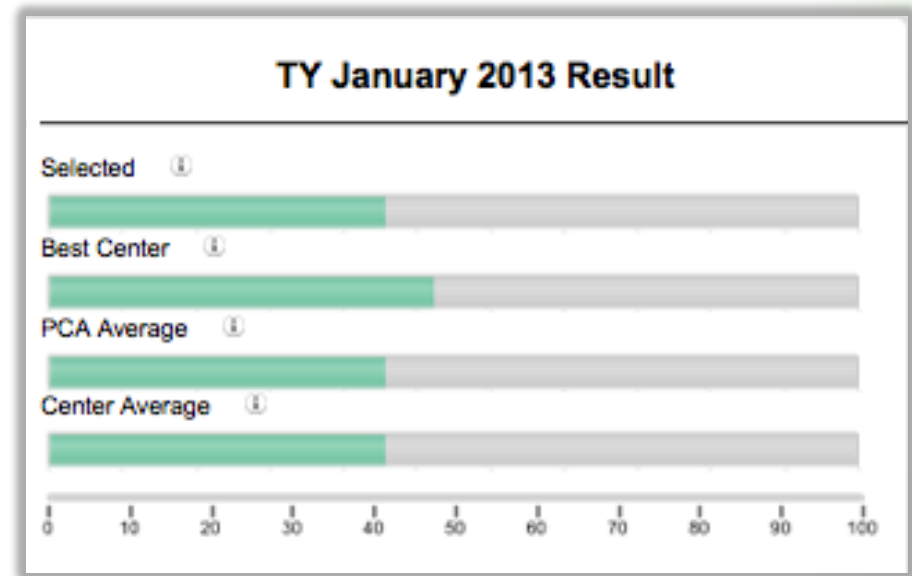
- The graph of the Multi-Period Trend allows you to look at the filtered measure value as a trend line over a period of time.
- For those measures where a threshold has been established, the primary and secondary targets are displayed as a green and yellow lines for comparison.



# Measure Analyzer – Benchmarks

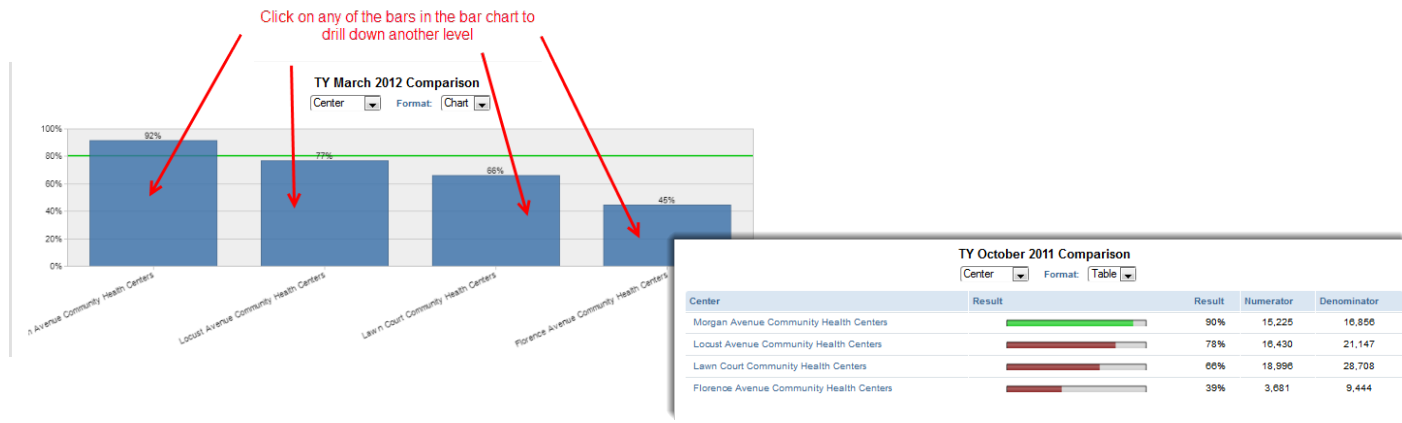
This chart shows the selected measure results for the most recent time period against Best and Average benchmarks.

- **Selected:** Result for filters (e.g., providers) selected
- **Best Center:** Result for the center in the PCA with the best results
- **PCA Average:** Average result for all centers in the PCA
- **Center Average:** Average result for all providers at your center



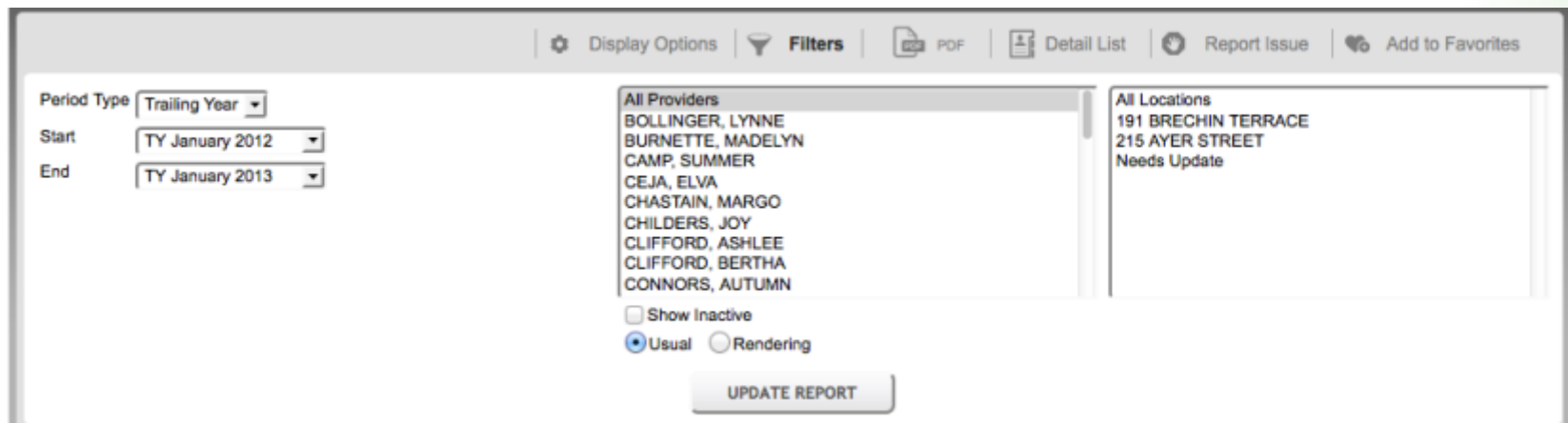
# Measure Analyzer – Comparisons

- Displays Comparison data in chart or table form.
- The table form color codes whether the results have met the threshold (green) or not (red)
- Clicking on the bars in the bar chart or the highlighted links in the table 'drills' down into the measure for more detail and a new **Measure Analyzer** is displayed



# Measure Analyzer – Filtering

- As in the Scorecard Reports, results can be filtered based on a period of time, specific providers or specific locations
- To customize your analysis, click **Filters**, choose the filters, and click the **Update Report** button

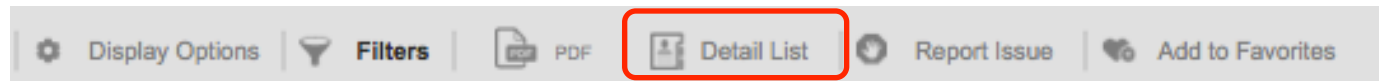


The screenshot displays the Measure Analyzer interface with the following elements:

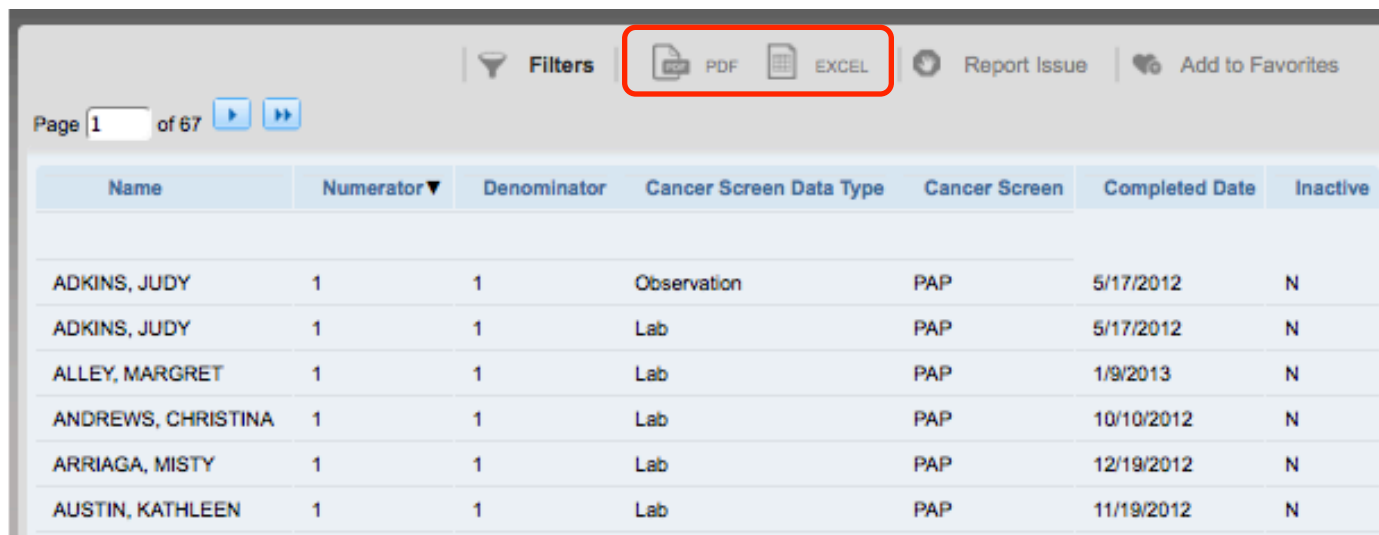
- Navigation Bar:** Includes icons for Display Options, Filters, PDF, Detail List, Report Issue, and Add to Favorites.
- Period Type:** A dropdown menu set to "Trailing Year".
- Start:** A dropdown menu set to "TY January 2012".
- End:** A dropdown menu set to "TY January 2013".
- Providers List:** A scrollable list under the heading "All Providers" containing the following names:
  - BOLLINGER, LYNNE
  - BURNETTE, MADELYN
  - CAMP, SUMMER
  - CEJA, ELVA
  - CHASTAIN, MARGO
  - CHILDERS, JOY
  - CLIFFORD, ASHLEE
  - CLIFFORD, BERTHA
  - CONNORS, AUTUMN
- Locations List:** A scrollable list under the heading "All Locations" containing:
  - 191 BRECHIN TERRACE
  - 215 AYER STREET
  - Needs Update
- Filters:** A section with two radio buttons: "Show Inactive" (unchecked) and "Usual" (checked). There is also an unchecked "Rendering" radio button.
- Update Report:** A prominent button at the bottom center.

# Measure Analyzer - Patient Detail

- The Measure Analyzer supports access to the patient data behind the Numerator and Denominator values. This is done by clicking the **Patient Detail** button from the utility bar.



- The resulting Patient Detail List is sortable and may be exported as either a PDF or an Excel spreadsheet



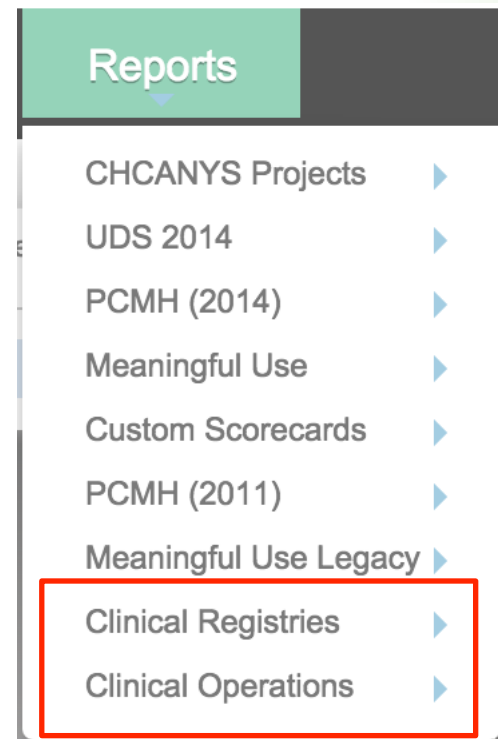
A screenshot of a web application interface showing a table of patient data. The utility bar at the top includes 'Filters', 'PDF', 'EXCEL', 'Report Issue', and 'Add to Favorites'. The 'PDF' and 'EXCEL' buttons are highlighted with a red box. Below the utility bar is a pagination control showing 'Page 1 of 67' with navigation arrows. The table has the following columns: Name, Numerator, Denominator, Cancer Screen Data Type, Cancer Screen, Completed Date, and Inactive.

| Name               | Numerator | Denominator | Cancer Screen Data Type | Cancer Screen | Completed Date | Inactive |
|--------------------|-----------|-------------|-------------------------|---------------|----------------|----------|
| ADKINS, JUDY       | 1         | 1           | Observation             | PAP           | 5/17/2012      | N        |
| ADKINS, JUDY       | 1         | 1           | Lab                     | PAP           | 5/17/2012      | N        |
| ALLEY, MARGRET     | 1         | 1           | Lab                     | PAP           | 1/9/2013       | N        |
| ANDREWS, CHRISTINA | 1         | 1           | Lab                     | PAP           | 10/10/2012     | N        |
| ARRIAGA, MISTY     | 1         | 1           | Lab                     | PAP           | 12/19/2012     | N        |
| AUSTIN, KATHLEEN   | 1         | 1           | Lab                     | PAP           | 11/19/2012     | N        |

# Clinical Registry & Operations Reports

## Current Clinical Registry Reports include:

- Adult Female Primary Care
- Adult Male Primary Care
- Pediatric Primary Care
- Immunizations (Childhood)
- Diabetes Labs & Services
- Asthma Status & Management
- Hypertension
- HIV
- Depression



## Clinical Operations

- Patient Visit Planning Report



# Clinical Registry Reports

- Provide a method to manage chronic conditions, measure preventive clinical parameters, and analyze improvement
- Clinical Registries allow you to create reports with patient level detail that can be used to either
  - Retrospectively analyze data based on their most recent encounter
  - Prospectively analyze data based on their next appointment.
- There is a common set of data elements in each report (e.g., Patient Name, MRN) and a set of data element specific to the Chronic Disease or Preventive Care category

Clinical Registries - Diabetes Labs & Services

ADVANCED MODE Show/Hide Filters Export: PDF EXCEL Report Issue Add to Favorites

Page 1 of 369

| Name                                     | MRN          | Age | Last Encounter | Next Appointment | A1c Test Date | A1c Result | LDL Test Date | LDL Result | UACR Test Date | UACR Result | BP Date    | Blood Pressu |
|--|--------------|-----|----------------|------------------|---------------|------------|---------------|------------|----------------|-------------|------------|--------------|
| Florence Avenue Community Health Centers |              |     |                |                  |               |            |               |            |                |             |            |              |
| JENKINS, ANDRE                           | 0004733001BA | 55  | 2/14/2012      |                  | 1/11/2012     | 7.4        | 3/11/2011     | 99         | 3/11/2011      | 0           | 2/11/2012  | 182 / 92     |
| WILLIAMSON, ADELINE                      | 00004605801S | 62  | 1/11/2012      |                  | 10/17/2011    | 6.4        | 10/25/2011    | 106        | 1/11/2012      | 8           | 1/7/2012   | 114 / 66     |
| BATES, GUS                               | 00003269801S | 77  | 12/12/2011     | 6/6/2012         | 12/5/2011     | 6.4        | 12/5/2011     | 73         | 12/21/2009     | 223         | 11/29/2011 | 124 / 66     |

# Clinical Registry Reports

- The result set can be sorted on any column by clicking on the highlighted heading
  - Columns may also be moved around by dragging and dropping to put in a different order
- Reports may be exported as either an Excel spreadsheet or PDF tearsheet
- Results can also be grouped

| Name                                     | MRN          | Age | Last Encounter | Next Appointment | Self Management Goal | Last Symptom Free Days | Symptom Free Days | Last Tobacco Exposure | Severity Assessment | Severity Assessment | Control Meds |
|--|--------------|-----|----------------|------------------|----------------------|------------------------|-------------------|-----------------------|---------------------|---------------------|--------------|
| Florence Avenue Community Health Centers |              |     |                |                  |                      |                        |                   |                       |                     |                     |              |
| Aline Horton                             |              |     |                |                  |                      |                        |                   |                       |                     |                     |              |
| Grouped by Provider                      |              |     |                |                  |                      |                        |                   |                       |                     |                     |              |
| Name                                     | MRN          | Age | Last Encounter | Next Appointment | Self Management Goal | Last Symptom Free Days | Symptom Free Days | Last Tobacco Exposure | Severity Assessment | Severity Assessment | Control Meds |
| DAY, TAYLOR                              | 0004132201BA | 57  | 12/1/2011      |                  |                      |                        |                   |                       |                     |                     |              |
| Angelita Mejia                           |              |     |                |                  |                      |                        |                   |                       |                     |                     |              |
| Name                                     | MRN          | Age | Last Encounter | Next Appointment | Self Management Goal | Last Symptom Free Days | Symptom Free Days | Last Tobacco Exposure | Severity Assessment | Severity Assessment | Control Meds |
| BENTLEY, ILA                             | 00006204702A | 31  | 2/22/2012      |                  |                      |                        |                   |                       |                     |                     |              |

# Clinical Registry – Filtering

- Results can be filtered based on a period of time, specific providers or specific locations
- To customize your analysis, click **Filters**, choose the filters, and click the **Update Report** button
  - Pressing the **More Filters** button from within the filters screen opens an additional popup screen of filtering options

The screenshot shows a web-based filtering interface for a clinical registry. At the top, there is a navigation bar with icons for 'Filters', 'PDF', 'EXCEL', 'Report Issue', and 'Add to Favorites'. The main content area is divided into several sections:

- Period:** Includes radio buttons for 'Most Recent Encounter' (selected) and 'Future Appointment'. Below are 'Start Date' and 'End Date' fields, both set to 5/12/2013 and 5/22/2013 respectively, with calendar icons.
- Providers:** A list box titled 'All Providers' containing names: ACEVEDO, ESMERALDA; ADAM, AMPARO; ARREOLA, MARLA; ASHTON, YVONNE; BEATTY, KIM; BEAVER, ALYSSA; BECERRA, ILENE; BERMUDEZ, DEANNA; BEYER, JEWELL. Below the list are radio buttons for 'Usual' and 'Rendering' (selected).
- Locations:** A list box titled 'All Locations' containing addresses: 1034 POST OFFICE AVENUE; 1079 LOWELL JUNCTION ROAD; 1117 PRINCETON AVENUE; 1132 GOULD ROAD; 117 HIDDEN ROAD; 250 COTTAGE ROAD; 308 RED SPRING ROAD; 330 LANDAU LANE; 383 SLEEPY HOLLOW LANE.
- Grouping:** Radio buttons for 'None' (selected), 'Provider', and 'Location'.
- Buttons:** A 'MORE FILTERS ->' button and an 'UPDATE REPORT' button.

# What does the Pt Visit Planning Report Do ?

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- Performs an *electronic chart audit* for chronic and preventative care action items for each scheduled patient.
- Facilitates *more efficient* pre-visit planning by allowing care teams to review patients' *preventative and chronic care alerts, in one report.*
- Displays *only actionable items* to keep the team focused.
- Displays patients' *chronic illnesses* and *risk factors* to help staff identify high need patients *who need additional care coordination.*



# Clinical Operations - Patient Visit Planning

**Facilitates more efficient pre-visit planning sessions by allowing care teams to review alerts for patients with upcoming appointments**

- Displays **only** relevant and actionable items to help teams prepare for visits
- Displays active diagnoses and relevant risk factors
- Alerts indicate whether particular clinical parameters, labs or screenings are (a) missing, (b) overdue or (C) not in “good” control
- Alerts are **configurable**

## Diagnoses

- ◇ Diabetes
- ◇ Hypertension
- ◇ Asthma
- ◇ Depression
- ◇ HIV
- ◇ CHF
- ◇ CAD
- ◇ IVD

## Risk Factors

- ◇ Tobacco User
- ◇ Pregnant
- ◇ Obesity (OBS)
- ◇ Severe Mental Illness or Psychoses (SMIP)
- ◇ Substance Abuse or Dependence (SAD)

## Alerts

- ◇ A1c
- ◇ LDL
- ◇ Eye Exam
- ◇ Monofilament Exam
- ◇ Nephropathy Screen
- ◇ Flu
- ◇ PCV
- ◇ Blood Pressure
- ◇ Tobacco Status
- ◇ Tobacco Cessation
- ◇ Dental Visit
- ◇ BMI
- ◇ BMI Percentile
- ◇ Mammogram
- ◇ Pap Smear
- ◇ Asthma Severity
- ◇ Depression Screening
- ◇ Nutritional Counseling
- ◇ Physical Activity Counseling
- ◇ Colorectal Cancer Screening
- ◇ BMI and Follow-Up

# Patient Visit Planning

- Like the Clinical Registries, the Patient Visit Planning report can be run:
  - Prospectively to prepare and plan for patients' upcoming appointments
  - Retrospectively (based on patients' most recent encounter) to review the success of care teams planning, preparation and execution
- The report is organized by provider and appointment time and may be filtered by provider or location
- Reports may be exported and printed as a PDF tearsheet

| Patient Visit Planning    |                    |                     |                         |                           |                        |  |
|---------------------------|--------------------|---------------------|-------------------------|---------------------------|------------------------|--|
| KAPLAN, SHARLENE          |                    |                     |                         |                           |                        |  |
| Monday, November 18, 2013 |                    |                     |                         |                           |                        |  |
| 9:30 AM                   | NOLAN GAMBOA       | Low Risk            | M, 35                   | Spanish                   | PCP: MCCARTY, LYNNETTE |  |
| MRN: 001990198981         |                    | Diabetes            |                         |                           | Risk Factors:          |  |
|                           | <u>Alert Type</u>  | <u>Message</u>      | <u>Most Recent Date</u> | <u>Most Recent Result</u> |                        |  |
|                           | A1c                | Overdue             | 8/20/2012               | 1                         |                        |  |
|                           | BP                 | Result out of range | 4/26/2013               | 131/82                    |                        |  |
|                           | Eye Exam           | Missing             |                         |                           |                        |  |
|                           | Monofilament Exam  | Missing             |                         |                           |                        |  |
|                           | Nephropathy Screen | Missing             |                         |                           |                        |  |
| THOMPSON, CONCETTA        |                    |                     |                         |                           |                        |  |
| Monday, November 18, 2013 |                    |                     |                         |                           |                        |  |

# Customizing the Pt Visit Planning Report

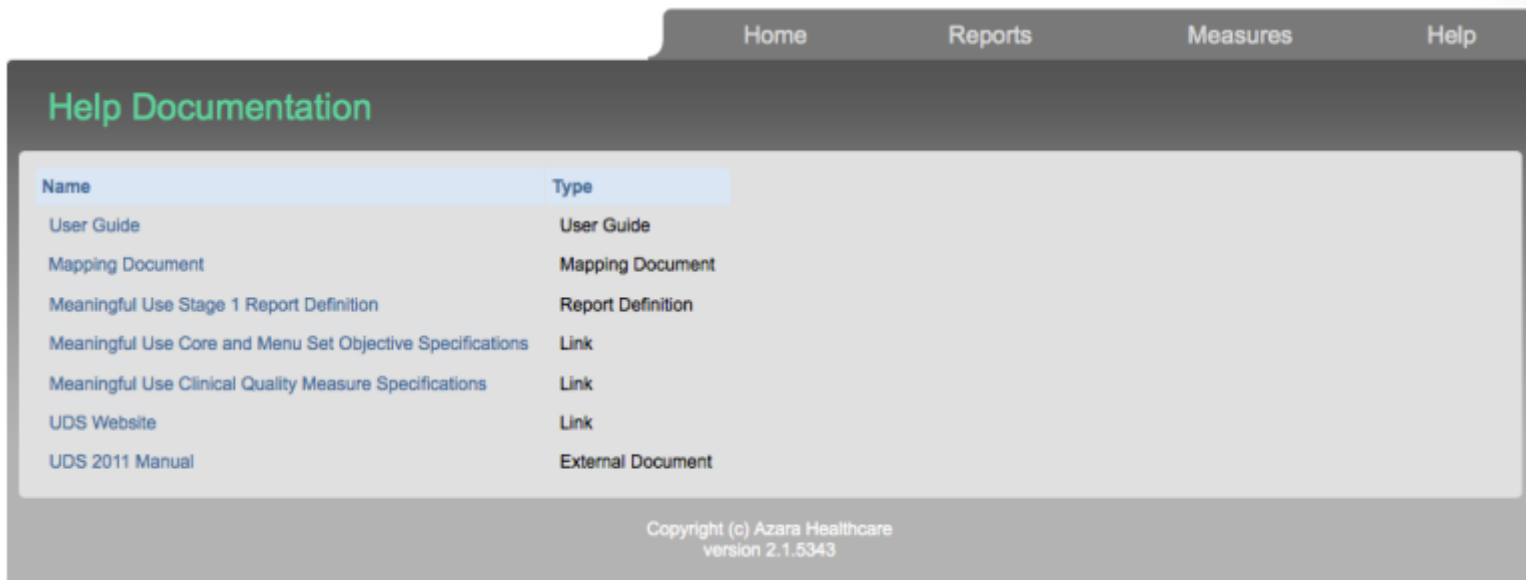
- Clicking the “i” button allows you to see current settings for your center
- Alerts can be configured to meet the needs of your center
  - Alerts can be turned on / off
  - Alerts can be associated with specific diagnoses
  - Lookbacks can be varied and modified
  - Min and Max values for labs and blood pressure can be changed

| Center         | Alert              | Target Min | Target Max | Target 2 Min | Target 2 Max | Lookback Days | Diabetes | HIV | Asthma | HTN | Depression | COPD | CHF | CAD | IVD | Tobacco User | Pregnancy | Age Min | Age Max | Sex |
|----------------|--------------------|------------|------------|--------------|--------------|---------------|----------|-----|--------|-----|------------|------|-----|-----|-----|--------------|-----------|---------|---------|-----|
| Lawn Court CHC | Mammogram          |            |            |              |              | 730           | 0        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 40      | 70      | F   |
| Lawn Court CHC | Pap Smear          |            |            |              |              | 1095          | 0        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 24      | 65      | F   |
| Lawn Court CHC | Asthma Severity    |            |            |              |              | 36500         | 0        | 0   | 1      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | A1c                | 1          | 7          |              |              | 180           | 1        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | BP                 | 1          | 130        | 1            | 80           | 365           | 1        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | Eye Exam           |            |            |              |              | 365           | 1        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | LDL                | 1          | 100        |              |              | 365           | 1        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 150     | B   |
| Lawn Court CHC | Monofilament Exam  |            |            |              |              | 180           | 1        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | Nephropathy Screen |            |            |              |              | 365           | 1        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | Flu                |            |            |              |              | 365           | 0        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 1       | 85      | B   |
| Lawn Court CHC | BP                 | 1          | 140        | 1            | 90           | 365           | 0        | 0   | 0      | 1   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | LDL                | 1          | 100        |              |              | 365           | 0        | 0   | 0      | 1   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | BP                 | 1          | 140        | 1            | 90           | 365           | 0        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 1   | 0            | 0         | 0       | 85      | B   |
| Lawn Court CHC | PCV                |            |            |              |              | 36500         | 1        | 0   | 0      | 0   | 0          | 0    | 0   | 0   | 0   | 0            | 0         | 65      | 85      | B   |

# Help

## The Help Screen includes links to:

- The User Guide
- A mapping document detailing where data has been pulled from the CHCANYS source systems for inclusion in CPCI
- Websites of compliance organizations (CMS)



The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Reports', 'Measures', and 'Help'. Below the navigation bar is a section titled 'Help Documentation' which contains a table with two columns: 'Name' and 'Type'. The table lists several items, including a User Guide, a Mapping Document, a Report Definition, and several external links and documents.

| Name  | Type              |
|---|-------------------|
| User Guide  | User Guide        |
| Mapping Document  | Mapping Document  |
| Meaningful Use Stage 1 Report Definition                  | Report Definition |
| Meaningful Use Core and Menu Set Objective Specifications | Link              |
| Meaningful Use Clinical Quality Measure Specifications    | Link              |
| UDS Website   | Link              |
| UDS 2011 Manual   | External Document |

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# What's Coming ...

- Azara deploys new releases on about an eight (8) week cycle
  - Releases consist of new functionality and application improvements
- Release Notes are published and emailed following all major releases

**DRVS Release Notes** October 30, 2014

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**What's New in DRVS Release 3.13**

Release 3.13 is the culmination of much work by the Azara team. Once again UDS season is upon us and this release contains tons of updates that make our UDS reports even smarter. The 2014 UDS manual has not yet been released, but as soon as it is out we'll be adjusting the HIV follow-up and Depression Screening measures. Also included are new PCMH reports using more current 2014 measures. We are excited to make this release available and look forward to putting forth new and exciting functionality in future releases.

As always, contact us at [support@azarahealthcare.com](mailto:support@azarahealthcare.com) if you have any questions or concerns.

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**UDS 2014**

Our August release featured many changes in support of UDS 2014 reporting based on HRSA's Program Assistance Letter (PAL). This release sees some additional changes being rolled out. These changes are outlined below. Note that all measures developed or updated per the PAL are subject to change based on publication of the official specifications in the forthcoming UDS 2014 manual. Details for the PAL can be found [here](#).

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**Prenatal Care (Table 6b) and the Measure Analyzer** Enhanced

Modified the Prenatal Care measure to show groupings by trimester/location in the comparison chart of the Measure Analyzer as opposed to the timeline chart.

# Key Contact Information

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- For assistance with use of CPCI data and reports for Quality Improvement, contact CHCANYS Quality Improvement Program  
[qiteam@chcanys.org](mailto:qiteam@chcanys.org)
- To access CPCI, contact your health center's CPCI Administrator, or Natalya Malamud, Health IT Project Manager, CHCANYS at  
[Nmalamud@chcanys.org](mailto:Nmalamud@chcanys.org)
- For technical support or to report data quality concerns, contact Azara Technical Support  
[support@azarahealthcare.com](mailto:support@azarahealthcare.com)
- CPCI URL  
<https://drvs.azarahealthcare.com/ryan>
- **When you report an issue ... be specific !**
  - What Report / Measure were you running ?
  - What Filters were you using ?
  - Provide examples (e.g., MRN) ?
  - What were you expecting ?