

# Clinical and professional reports

# Conflict of Interest Disclosure

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Have no real or apparent conflicts of interest to report.

# Overview

We will be reviewing a list of reports that will help you to reduce liability and improve patient care. This is just a small hand-picked list of reports that are available in your MOIS EMR. We will also include with this list the suggested frequency to run each of these reports and hopefully teach you a couple tips and tricks along the way!

# These are the reports that we have included information for you on your USB sticks!



Section	Report	Frequency to run
Clinical – Audits	Scorecard	As needed
Clinical – Audits	Clinical Value Scorecard	2, up to 4 times a year
Clinical – Main	Age/ Sex Registry	Quick one to check numbers; run as frequently as you want- it's the top portion of the AMCARE report (AMCARE is quarterly)
Clinical – Main	Unresulted Orders	Every Month
Clinical – Main	Patient by diagnosis/ fee code	Twice a year
Clinical – Audits	Pap Smear Audit	Monthly
Clinical – Audits	Number of Visits	Quarterly
Practice Management	Visit Mode/Code/Status	As needed
Practice Management	Patient Registration	Annual or twice a year, up to monthly if applicable
Practice Management	Messages/ Tasks Audit	Clinic Administrator should do once a month
Practice Management	Waitlist Summary Report	Either weekly or monthly depending on your clinic's needs
Practice Management – Access	Wait/ Appointment Duration	Quarterly

# Visit Mode/ Code/ Stat us and Pivot Tables!



- This report is found in Practice Management
- Run this report as often as needed
- Parameters
- Sample questions
- What is a pivot table?

**Our example today:  
How many specialty visits  
has your GP completed?**

# Report parameters



Report: Practice Management - Visit Mode / Code / Status

**Selection Parameter**

**Appointment Date Range (INCLUSIVE)**

Start Date: 2019.01.01  
End Date: 2019.05.17

**Encounter Details**

Visit Mode:  (optional - blank for all)  
Service Location:  (optional - blank for all)

**Visit Codes**

INCLUDED  C,CONSULT,CT,DT,ER,F,G,GPS,H,LA,MINOR,MRI,N ... (optional - blank for all)

**Status Codes**

INCLUDED  A,C,D,I,N,R,S ... (optional - blank for all)

**Report Type**  Simple  Advanced

**Output Format**  Direct Output to Excel

Ok Cancel

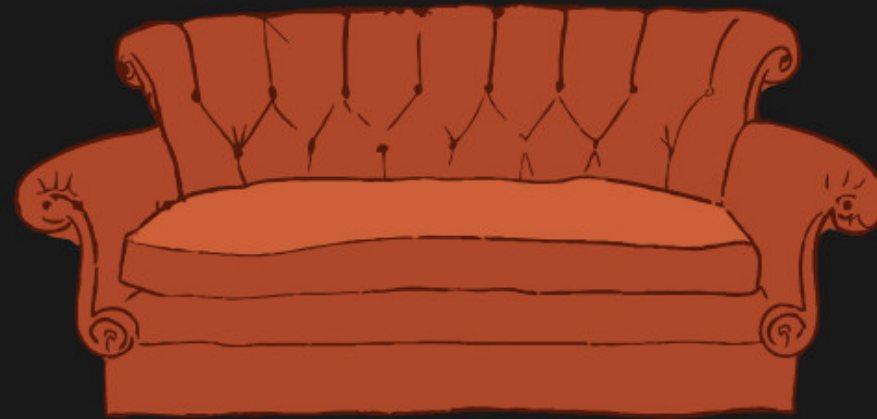
# More Parameters



<b>Report Type</b>	<input type="radio"/> Simple	<input checked="" type="radio"/> Advanced	
<b>Filter Type</b>	<input checked="" type="radio"/> AND	<input type="radio"/> OR	
<b>Provider</b>	<input type="text"/> ... <input type="text"/> ... <input type="text"/> ...	(optional - blank for all)	
<b>Attending</b>	<input type="text"/> ... <input type="text"/> ... <input type="text"/> ...	(optional - blank for all)	
<b>Author</b>	<input type="text"/> ... <input type="text"/> ... <input type="text"/> ...	(optional - blank for all)	
<b>Output Format</b>	<input checked="" type="radio"/> Encounter	<input type="radio"/> Health Issue	<input type="radio"/> Service Code
(Advanced report only outputs CSV)			
<input type="button" value="Ok"/>		<input type="button" value="Cancel"/>	



P.I.V.O.T



# Wait / Appt Duration



- Based on the AS column in the Scheduler (AS = Appointment Status)
- Run approximately quarterly
- MOIS time-stamps each change made to an appointment from either the drop-down menu on the Daybook, or if the times are added in the Encounter Detail Window:

AS
D
A
I

or

Times	
Arrived:	:
In-Room:	11 : 24
Seen:	:
Discharge:	:

Hint: updating these times could be considered a shared responsibility; MOA can be responsible for Arrival to In Room; providers could be responsible for Seen and Discharge times.

# Parameters and slices



Some of the MOIS reports include Slices

Report: Practice Management - Access - Wait/Appt Duration

**Selection Parameter**

**Date Range**

Start Date: 2019.04.01  
End Date: 2019.05.20

**Weeks between Slices**

Number: 1

**Visit Codes:**

Exclude: [ ] (seperate by comma)

**Time Intervals**

Arrival to Appointment  
 Appointment to Seen  
 Seen to Discharge

Ok Cancel

# Excel Out put



This report outputs to CSV by default.

	A	B	C	D	E	F	G	H	I	J
1	PROVIDER - Appt Duration	2019.04.01	2019.04.08	2019.04.15	2019.04.22	2019.04.29	2019.05.06	2019.05.13		
2	DR. DEREK SHEPHERD	0	0	0	0	25	21	0		
3										
4										

When dealing with slices, you might actually notice a negative number.

# Why run it ?

This report can be used periodically throughout the year.



- **Work – life balance!**
  - Are you constantly working later than you'd like to?
- **Business model → can your scheduling practices be improved?**
  - Are you often getting feedback from patients about long wait times?
  - What is the average length of time a patient is being seen versus what are they being booked for? If you're seeing patients for an average of 20 minutes, but appointments are only being booked for 10 minutes, how can you update your scheduling to work better for your office?
  - Default visit code lengths! These can be updated at the clinic level as needed.

# Scorecards

- The Scorecard can be ran twice a year or up to 4 times a year depending on panel clean up.
- Why would you run this? It helps by giving you a representation or true picture of the work being done in your clinic.
- Quality Data – improved patient care and accuracy of reporting.
- The Scorecard allows you to audit your entire practice according to best practice guidelines in the areas of Prevention, Screening and Chronic Disease Management, along with the demographic breakdown of your practice.

# How to run the audit



MOIS - HALLIWELL MEDICAL CLINIC

Record Modules Action Utilities Print Maintenance Help

**Reports**

- Report List

**Report List**

- Accounts - General
- Accounts - MSP
- Accounts - Private (Inv)
- Accounts - Private (Trans)
- Bills - by Diagnosis
- Bills - Fee Code
- Clinical - Audits**
  - ASTHMA (Excel) ASTHMA Excel Output
  - CHF (Excel) CHF (Excel) HEART FAILURE EX
  - CHRONIC KIDNEY DISEASE (Excel) CHRONIC KIDNEY D
  - COPD Audit COPD Audit Excel Output
  - Diabetes (Excel) Diabetes Excel Output
  - Hepatitis C (Excel) Hepatitis C Excel Output
  - HTN (Excel) Hypertension Excel Output
  - Mammogram Mammogram
  - Number of Visits Number of Visits for
  - Obesity Obesity
  - Pap Smear Pap Smear
  - Polypharmacy Polypharmacy
  - Scorecard Scorecard
  - Scorecard - Clinical Value Clinical Value Scorecard
- Clinical - Main
- Clinical - P
- Dur
- Forms
- MSP Billing
- Practice Management
- Practice Management - Access
- Recalls / Reminders

**Navigation Panel:**

- Patient Chart
- Workspace
- Scheduler
- Billing
- Administration
- Data Exchange
- Reports**

To Run the Audit, navigate to your 'Report Module'

Expand the 'Clinical Audits' field and locate the Scorecard.

Double click to open the report

# Parameters



Report: Clinical - Audits - Scorecard

**Selection Parameter**

**Scorecard Options:**

Version: V2 - Current

As of Date: 2019.05.21 (a cut-off date for problems and events - if blank, will use today)

Time Period: 3 (number of years from present or as of date, if applicable, since last contact)

Provider(s):  Current Desktop  All Providers

Facility Code: [dropdown]

Service Center: [dropdown]

Patients List:  Only Active Patients

Deficient Items:  Direct output to Spreadsheet (CSV)

Buttons: Previous Scorecard..., Build Scorecard, Cancel

Select the parameters for your report.

- Time period you wish to review
- Provider (current desktop or all providers)
- Facility code if desired
- Service Centre
- Patient list (by default this is checked to include only active patients)
- You can check off deficient items which then will directly output to a spreadsheet.
- Note that you can also view your previous scorecard
- Build your Scorecard!



# MAS Report Output



SCORE CARD FOR:

PRACTICE: HALLIWELL MEDICAL CLINIC

PAGE 1

As Of Date: 2019.05.21

Patients Seen in Last: 3 years

For Provider(s): HALLIWELL, A.

Contacts / Pt	MALE		AGE	FEMALE		
	No. of Contacts	No. of Patients		No. of Patients	No. of Contacts	Contacts / Pt
0.00	0	0	0 - 9	0	0	0.00
0.00	0	0	10 - 19	0	0	0.00
0.00	0	0	20 - 29	0	0	0.00
0.00	0	0	30 - 39	0	0	0.00
0.00	0	0	40 - 49	0	0	0.00
0.00	0	0	50 - 59	0	0	0.00
0.00	0	0	60 - 69	0	0	0.00
0.00	0	0	70 - 79	0	0	0.00
0.00	0	0	80 - 89	0	0	0.00
0.00	0	0	90 - 100+	0	0	0.00
<b>0.00</b>	<b>0</b>	<b>0</b>	<b>TOTALS</b>	<b>0</b>	<b>0</b>	<b>0.00</b>
UNKNOWN AGE OR SEX:			0	TOTAL PATIENTS:		0

- The top part of your report will be your Age/Sex Registry

# MAS Report Output

- preventions



Prevention	Current Tobacco use age 12-19	0	0	-
Prevention	Current Tobacco use age >19	0	0	-
Prevention	Tobacco use documented in last 2 yrs age 12-19	0	0	-
Prevention	Tobacco use documented in last 2 yrs age >19	0	0	-
Prevention	Overweight or Obese age 12-19	0	0	-
Prevention	Truncal Obesity age >19	0	0	-
Prevention	BMI or WC documented in last 2 yrs age 12-19	0	0	-

- Screening

Screening	Cervical Screening (F18-70, last 2 yrs) - BCCA pre 2016	0	0	-
Screening	Cervical Screening (F25-70, last 3 yrs) - BCCA 2016	0	0	-
Screening	Screening Mammogram (F50-70)	0	0	-
Screening	Chlamydia Testing in last 12 months (F18-24)	0	0	-
Screening	Chlamydia Test with POS result	0	0	-
Screening	Colon Screening in last 2 yrs age 50-74	0	0	-

- Chronic Disease Management

CDM	Diabetics with HGBA1C in last 6 mo	0	0	-
CDM	Diabetics with HGBA1C in last yr <= 7.0	0	0	-
CDM	Diabetics with LDL in last yr <= 2.5	0	0	-
CDM	Diabetes & BP <= 130/80 in last yr	0	0	-
CDM	Diabetes & Triple Whammy in last yr	0	0	-
CDM	Hypertension & BP in last yr	0	0	-

Again this will show you a standardized overview of the practice at a specified date. It will assist you to identify gaps in care, various care strategies, see your improvements and outcomes and help you set goals to aid with health care improvements.

# Clinical Value Scorecard

- Want to ensure quality data for your clinic? The Clinical Value Scorecard can be used to show where your data requires cleanup. Your clinic can run the clinical value scorecard bi-annually or quarterly depending on your patient panel cleanup needs.
- By adjusting the parameters you can view this for all providers or by a single provider.

# Parameters



Clinical Value Scorecard

Select Provider:   Unassigned Patients Only    Look Back:  Year(s)    View by:  Metric  Provider    Retrieve

Status Code(s):  (comma separated)    Scorecard Target:     Help?

[Expand All](#)   [Collapse All](#)

PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE
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Previous Scorecard...   Compare Results...   Save   Print

- Navigate to the 'Reports Module'
- Expand the 'Clinical-Audits'
- Double click on the report 'Scorecard-Clinical Value'
- You now can choose the provider or leave blank to see all of your providers.
- Choose the amount of years you wish to review.
- Select which status code(s) you would like to report on.
- Once you have set your parameters click on the 'Retrieve' button in the top right hand corner of the window.

# Output Window Display



Clinical Value Scorecard

Select Provider: DR. DEREK SHEPHERD  Unassigned Patients Only Look Back: 3 Year(s) View by:  Metric  Provider Retrieve

Status Code(s): A (comma separated) Scorecard Target: CVM LEVEL 3 - MAR 2014 Help?

[Expand All](#) [Collapse All](#)

PROVIDER	NUMERATOR	DENOMINATOR	PERCENTAGE	TARGET	INVESTIGATE
⊕ M05b ALLERGIES / INTOLERANCES (CODED)	1	1	100.0%	0%	
⊕ M06a SMOKING STATUS PRESENT	1	1	100.0%	20%	
⊕ M06b SMOKING STATUS CURRENT	0	1	-	N/A	
⊕ M07 BLOOD PRESSURE	1	1	100.0%	50%	
⊖ M08 HEIGHT/WEIGHT (BMI)	1	1	100.0%	30%	
DR. DEREK SHEPHERD	1	1	100.0%	30%	<span style="color: green;">●</span> <span style="color: red;">●</span>
⊕ M09 PRESCRIPTION PRESENT	1	1	100.0%	40%	
⊕ XX90 PRESCRIPTION CODED PRESENT	1	1	100.0%	N/A	
⊕ M10a PROCEDURES PRESENT (ALL)	1	1	100.0%	30%	
⊕ M10b PROCEDURES PRESENT (CODED)	1	1	100.0%	0%	
⊕ M11a VACCINATIONS/IMMUNIZATION PRESENT	1	1	100.0%	20%	
⊕ M11b INFLUENZA VACCINATIONS	1	1	100.0%	N/A	
⊕ M12 RECALL REMINDERS	1	1	100.0%	20%	
⊕ M13 REFERRALS PRESENT	1	1	100.0%	20%	
⊖ M14 ENCOUNTER NOTES	6	17	35.3%	80%	<span style="color: yellow;">●</span>
DR. DEREK SHEPHERD	6	17	35.3%	80%	<span style="color: red;">●</span>
⊕ XX01 AIHS - SERVICE PROVIDER	1	1	100.0%	N/A	
⊕ XX02 LONG TERM MEDICATIONS (ALL)	1	1	100.0%	N/A	
⊕ XX03 LONG TERM MEDICATIONS (CODED)	1	1	100.0%	N/A	
⊕ XX04 CARE PLAN (GOAL OR PREFERENCE)	1	1	100.0%	N/A	
⊕ XX08 HEALTH CONDITIONS - PERCENT CODED	11	13	84.6%	N/A	

Previous Scorecard... Compare Results... Save Print

- Now that you have set your parameters and retrieved your data, you will be presented with a result window.
- Note that you will see a 'Yellow' button on some of your rows, this is letting you know that there are some items that are not meeting the intended Data Target.
- When you expand the rows you there will be a 'Green' and a 'Red' button. If you hover over them you will note that the 'Green' is your charts that have no cleanup, and the 'Red' is your deficient charts.

# Report Output



<b>M14 ENCOUNTER NOTES</b>	6	17	35.3%	80%	
DR. DEREK SHEPHERD	6	17	35.3%	80%	

Chart Navigator

Chart	Patient Name	Description	Exclude
> 10035	BROWN,FARMER	FAILED: M01 - PATIENT INFORMATION	<input type="checkbox"/>
10047	DOE,JANE	FAILED: M01 - PATIENT INFORMATION	<input type="checkbox"/>
10036	DO-GOOD,DUDLEY	FAILED: M01 - PATIENT INFORMATION	<input type="checkbox"/>
10039	LAWLESS,LUCKY	FAILED: M01 - PATIENT INFORMATION	<input type="checkbox"/>
10040	SARCOMA,LEIOMYO	FAILED: M01 - PATIENT INFORMATION	<input type="checkbox"/>
10041	SEED,POPPY	FAILED: M01 - PATIENT INFORMATION	<input type="checkbox"/>

- When you click on the red button it will navigate you to the 'Chart Navigator Window' where you can now go to each chart and update the missing data/information.

# Want to review how your clinic's data is improving?

You can save these scorecards that you use to do your data cleanup then use them to do a comparison of your past scorecards. This is a great way to show data quality improvement!

# Unresulted Orders

It is suggested that the Unresulted Orders Report is run on a monthly basis.

Why? The purpose of the Unresulted Orders Report is to determine the patients who have an outstanding order within the selected date range. This report allows you to identify which orders may need additional follow-up, and which orders have had results received but have not had the order status adjusted to reflect this.



# Unresulted Orders parameters



MOIS - HALLIWELL MEDICAL CLINIC

Record Modules Action Utilities Print Maintenance Help

**Reports**

Report List

- Accounts - General
- Accounts - MSP
- Accounts - Private (Inv)
- Accounts - Private (Trans)
- Bills - by Diagnosis
- Bills - Fee Code
- Clinical - Audits
- Clinical - Main**

Age/Sex Register	Age / Sex Re...
Consult Reason for Dates	Consult Reasc...
Documents for Dates	Documents fo...
Facility Admission for Dates	Facility Admiss...
Imaging for Dates	Imaging for De...
Interventions for Dates	Interventions f...
Labcodes for Dates	Labcodes for I...
Measure Change Velocity	Measure Char...
Medications for Dates	Medications fc...
Order Status	Order Status F...
Patient Benefits	Patient Panel...
Patient by Health Issue / Service	Patient List by...
Patient Connections	Patient Panel...
Patients by Age	Patients by Ag...
Patients by Procedure	Patients by Pr...
Prescriptions for Dates	Prescriptions f...
Reaction Risks	Reaction Risk...
Service Episodes by MRP	Report on Pat...
Unresulted Orders	Unresulted Or...
Vaccination for Dates	Vaccination fc...

\*\*\*\*\*

- Patient Chart
- Workspace
- Scheduler
- Billing
- Administration
- Data Exchange
- Reports**

- To locate this report navigate to your 'Report Module'
- Expand the Clinical-Main selection
- Double click on the Unresulted Orders

# Unresulted Orders parameters



Report: Clinical - Main - Unresulted Orders

**Selection Parameter**

**\*Date Range (Inclusive):**

Start Date:  End Date:

**\*Order Types:** **Order Source:**

Image (XRay)  Procedure  Labs  (optional)

Consultation  Intervention  Misc

**Order Statuses:**

INCLUDED  ...

**Order Priorities:**

INCLUDED  ...

**Other Options:**

Include only Active Patients

**Output Options:**

Direct output to Chart Navigator for Chart Review / Mail Merge

Direct Output to Excel

- Select the parameters that you wish to review then how you would like to review the output.
- You can choose to send this report to the Chart Navigator or to CSV/Excel.

# Unresulted Orders Additional Search Parameters



**Ordered By:**

Four empty text input fields, each with a small "..." button to its right. A vertical scrollbar is visible to the right of these fields.

**Order To:**

Four empty text input fields, each with a small "..." button to its right. A vertical scrollbar is visible to the right of these fields.

**Assigned To:**

One empty text input field with a small "..." button to its right.

Ok Cancel

- Additional Search parameters include who it was Ordered By, who the Order was to and who it was Assigned to.

# Unresulted Orders



## MOIS Report Output

UNRESULTED ORDERS FOR THE DATE RANGE  
For Dates between 2018.01.01 and 2019.05.21  
For Types: IMAGE, CONSULTATION, LAB, PROCEDURE, INTERVENTION, MISC  
Statuses INCLUDING: IP

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ORDERED BY: <NOT LISTED>

PATIENT	CHART NUMBER	AGE	DATE ORDERED	ORDERED TO	ORDER PRIORITY	DESCRIPTION	STATUS	ASSIGNED TO
ADAM, GEORGE	10029	75	19.04.03	KOLISANG, MOHAU PAUL	ROUTINE	ACCIDENT D/T FLOODS	IP	

This data can be reviewed in three different ways

- MOIS REPORT
- Chart Navigator
- CSV Output (Can be filtered)

## Chart Navigator

Chart	Patient Name	Description	Exclude
> 10029	ADAM,GEORGE	UNRESULTED ORDER	<input type="checkbox"/>

## CSV Report Output

UNRESULTED ORDERS RESULT													
CHART NUMBER	PATIENT STATUS	LAST NAME	FIRST NAME	DOB	SERVI	START DATE	ORDER TYPE	SOURCE	ORDERED TO	ORDERED BY	DESCRIPTION (O	ORDER STATUS	PRIORITY
10029	A	ADAM	GEORGE	1944-02-07		2019-04-03	CONSULTATION	INT	KOLISANG, MOH	ADMINISTRATOR	ACCIDENT D/T F	IP	ROUTINE

Don't f or get ...



MOIS reporting depends on consistent  
data entry! 😊



# Thank you!



Don't forget, on the USB drive that you can find in your delegate backpack, we have included handouts with extra details for each of these reports.

Remember, anytime you have questions with these reports or would like to go over any of them in more detail, just give our office a call and the support team would be happy to help you!

Don't forget about our user manual that can be found inside your MOIS, by going to the Help menu at the top of your MOIS screen.