Factor 2: Generate lists of patients and proactively remind patients/families and clinicians of services needed for at least three different chronic care services

PCC's Dashboard and `recaller` tool have the ability to easily generate lists of patients overdue for the following chronic care services:

- ADD/ADHD followup care (Dashboard)
- Flu vaccination for asthma patients (Dashboard)
- Asthma patient followup care (`recaller`)
- Obese patient followup care (`recaller`)
- Depression patient followup care (`recaller`)
- Allergic Rhinitis patient followup care (`recaller`)
- Down syndrome patient followup care (`recaller`)

Just as we described above for the well-child care measure, the Dashboard measure detail page includes a link to a list of patients in need of followup care.

The list includes details for overdue patients including dates of recent and upcoming visits, and contact information. A Dashboard user can work from this list to contact patients reminding them that they are overdue for a routine well visit.

A spreadsheet in .csv output can also be generated from the Dashboard, allowing the practice to manage and distribute the lists to other practice staff or to integrate with a third party notification tool like *Televox* or *Phonetree.*

When using `recaller` for the condition-specific criteria mentioned above, you would add a diagnosis restriction:
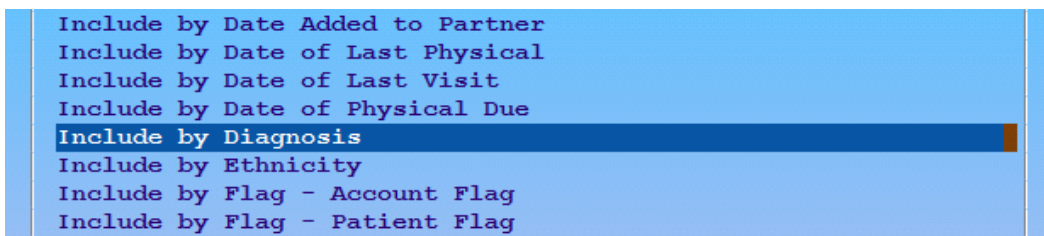
and then specify a time period for the diagnosis followed by the actual diagnosis entries you are restricting on.

For example, if you are focusing on generating a list of patients with a recent history of obesity (in the last two years) that need followup care, you would add the following criteria if your criteria was to see these patients once every six months:

- Include by diagnosis – specify patients with an obesity or elevated BMI ICD-9 code billed in the past two years.
- Include by date of last visit – specify a last visit date range ending six months ago (this would indicate their last visit was more than six months ago)

The "Patient Reminders" functionality in PCC EHR also allows PCC clients to generate lists of patients based on complex clinical criteria including:

- Patients with a particular lab test result
- Patients having a particular medication prescribed
- Patients having a particular medication allergy
- Patients having a particular diagnosis or problem assigned
- Patients having a particular BMI, height, weight, blood pressure, temperature, head circumference, pulse, respiratory rate, or 02 saturation.
- Patients with a certain race, ethnicity, or preferred language

When creating reminders, you would first specify your desired criteria. In this example, we are including patients who have a documented BMI in the 95th percentile or higher:

The output includes a listing of patients that meet the criteria:

View Patient Reminders

Patients with BMI >=95th percentile

PCC Pediatric Test Associates

Generated 05/06/2014 10:06am

Time Range for Criteria: From patient's birth through today

6 Criteria Matches for 6 Patients Found

Patient	Date of Birth	Sex	Contact Method	Contact Information
Flintstone, Pebbles PCC# 3336	03/08/04	Female	No Preference	15 Quarry Lane, Winooski, VT 05404
Gray, Julie PCC# 3333	08/13/95	Female	No Preference	1 Main St, Winooski, VT 05404
Jenson, Astro PCC# 0	06/22/09	Male	No Preference	15 Skypad Apts, 44 Washington Mews, CA 90001
Jones, Hilary PCC# 3339	12/26/96	Female	No Preference	111 Main Street, Colchester, VT 05446
Jones, Paul PCC# 3338	12/27/00	Male	No Preference	111 Main Street, Colchester, VT 05446
Kneasel, Joseph PCC# 2425	10/16/10	Male	No Preference	752 W Second Street, Sutton, VT 05867

The output can be saved in .csv format to be opened in a spreadsheet application where the data can be managed or used for mail merge.

Use the Reminder Log tab to review previous reminder runs that you saved to file:

Patient Reminders

Patient Reminders	Reminder Log		
Report Date ▽	Reminder Report Name	Sent	Total
05/06/14 10:11am	Patients with BMI >=95th percentile	0	6

You can open a log and mark reminders as sent, in order to record that you contacted the patient or family:

Patient Reminders

Mark Reminders As Sent

Patients with BMI >=95th percentile

PCC Pediatric Test Associates

Generated 05/06/2014 10:11am

Time Range for Criteria: From patient's birth through today

Select All   **Select None**

2 of 6 Marked As Sent   33%

Sent	Patient	Contact Name	Contact Method	Confidential Contact
05/06/14	Flintstone, Pebbles PCC# 3336	Wilma Flintstone	No Preference	15 Quarry Lane, Winooski, VT 05404
05/06/14	Gray, Julie PCC# 3333	Linda Gray	No Preference	1 Main St, Winooski, VT 05404
☐	Jenson, Astro PCC# 0	George and Jane Jenson	No Preference	15 Skypad Apts, 44 Washington Mews, CA 90001
☐	Jones, Hilary PCC# 3339	Erica Jones	No Preference	111 Main Street, Colchester, VT 05446
☐	Jones, Paul PCC# 3338	Erica Jones	No Preference	111 Main Street, Colchester, VT 05446
☐	Kneasel, Joseph PCC# 2425	Jesseca Kneasel	No Preference	752 W Second Street, Sutton, VT 05867

Display: ☒ Marked As Sent ☒ Unmarked   **Cancel**   **Save**

Patient Reminders

The reminder log functionality provides a work list of reminders that you've already sent and those that still need to be sent.