

PCC's Dashboard has the ability to easily generate lists of patients overdue for well child visits

Here is a screen shot from a Dashboard page showing how a practice is keeping their adolescents up-to-date for their well visits:

The screenshot shows the 'Practice Vitals Dashboard' for a 'Sample PCC Practice'. The dashboard has a navigation bar with links for HOME, FINANCIAL PULSE, CLINICAL PULSE, EDI DASHBOARD, and PRODUCTIVITY. In the top right corner, there are links for Logout, Change My Password, View Dashboard Update Log, and a small number '7'. The main heading is 'Measure: Well Visit Rates - Patients 12-21 Years'. Below this is a dropdown menu labeled 'Choose a measure'. To the right, it says 'Dashboard reports updated as of 3/31/2014'. The score is displayed as 'Your Score: 65 out of 100'. A descriptive paragraph explains that the measure shows the percentage of active patients aged 12-21 who have received at least one well visit in the past year. It notes that there are 4,636 active patients in this age group, and 1,568 of them are overdue for their well visit. A red arrow points to the link 'Click for a list of overdue patients'.

Included on this page is a count of how many active patients the practice has in that age range and a link to a listing of the overdue patients. Our experience shows that many practices dismiss clinical measures until they see the details of who is affected. Once the physicians see and understand their data, their behavior changes.

After clicking on the “Overdue patient listing” link in the above screenshot and choosing a desired age of patients to view, the Dashboard user will be presented with a report of patient details as shown in the screenshot below:

Patients Overdue For a Well Visit (6 Years old)

Why are these 115 patients overdue?

Data is up-to-date as of 2/28/2014

- They have been seen by someone in your practice **at least once in the past three years**
- AND
- They are **not flagged** with any inactive flags
- AND
- They have not had a well visit **in the past year**, as recommended by the AAP Bright Futures Periodicity Schedule for children in this age range

[Save as Spreadsheet File](#) Spreadsheet file is in .csv format and includes patient address.

First Name	Last Name	Date of Birth	Patient PCC #	Primary Care Provider	Patient Flags	Date of Last Well Visit	Date of Last Visit	Date of Next Scheduled Visit	Reason for Next Scheduled Visit	Phone Number	Email Address
		09/07/07					03/14/11				
		01/04/08					03/18/11				
		05/11/07				05/17/11	05/17/11				

The list includes details for overdue patients, dates of recent and upcoming visits, and contact information. Overdue patients on this list could be patients they regularly see but are just overdue for a routine well visit, or they could be patients who have rarely if ever visited and have fallen off the practice radar. 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 *Constant Contact* or *Phonetree*.

PCC's Dashboard has the ability to easily generate lists of patients overdue for the following preventive care services:

- Well-child visits
- Childhood Immunizations

Here is a screen shot from a Dashboard page showing how a practice is keeping their adolescents up-to-date for their well visits:

Sample PCC Practice

Logout
[Change My Password](#)
[View Dashboard Update Log](#)

Measure: Well Visit Rates - Patients 12-21 Years

Choose a measure ▾

Dashboard reports updated as of 3/31/2014

Your Score: **65** out of 100

This measure shows the percentage of all active patients who are currently between the ages of 12 years and 21 years who have received at least one well visit in the past year. Active patients are those that have been seen at least once (for any visit) in the past three years, and do not have a flag indicating they are inactive.

You have **4,636** active patients between the ages of 12 years and 21 years.

[1,568 of these patients are overdue for their well visit.](#) [Click for a list of overdue patients](#)

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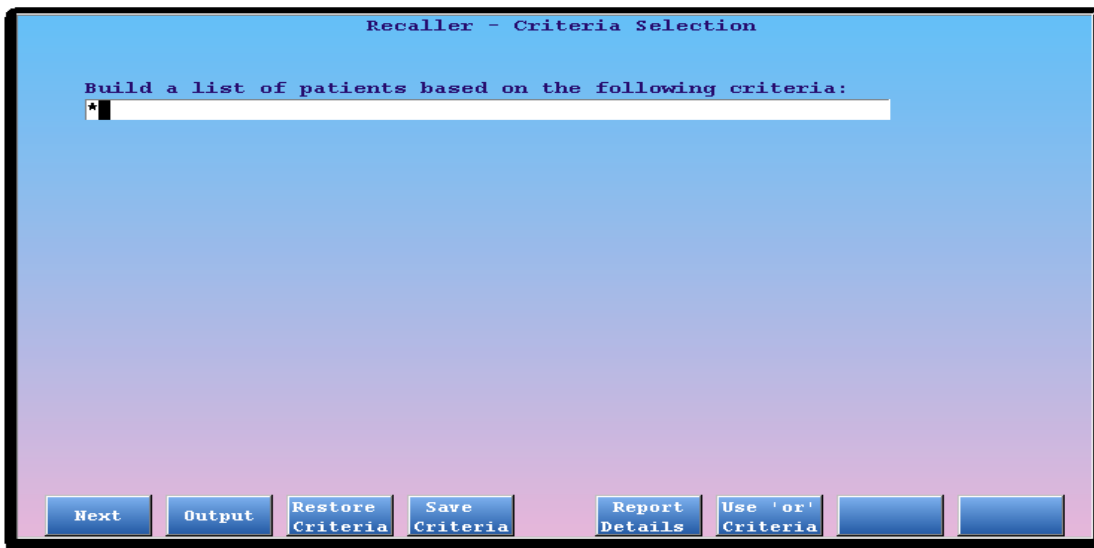
A spreadsheet in .csv output can also be generated from the Dashboard, allowing the practice to manage and distribute the lists to other practice staff or to integrate with a third party notification tool like *Constant Contact* or *Phonetree*.

PCC practices can also use the `recaller` reporting tool to generate lists of patients overdue for preventive care services such as:

- Adolescents needing depression screening
- Infants needing developmental screening
- 4-5 year olds needing vision or hearing screening
- Newborns needing hearing screening
- Patients recently discharged from the hospital/ER needing follow up
- Children overdue for tobacco and/or alcohol/substance abuse counseling

We'll describe below how to use `recaller` to generate a listing of active preschool age patients who are in need of a vision screening. In this example, we'll generate a list of four-year-old kids who have not had a vision screening in the past two years.

The user would first restrict by age to include only patients currently four years old.



Then choose the criteria for “Include by Age”:

```
Include by Age
Include by Appointment (All Providers)
Include by Appointment and Provider
Include by Birthday (Next)
Include by Date Added to Partner
Include by Date of Last Physical
Include by Date of Last Visit
Include by Date of Physical Due
Include by Diagnosis
Include by Ethnicity
Include by Flag - Account Flag
Include by Flag - Patient Flag
Include by Insurance Plan
```

When prompted specify that you want to include patients between the ages of 4 years, 0 months to 4 years, 11 months. This captures patients at least four years old but less than five years old:

```
Recaller - Select Dates

Include by Age

between 4 yrs 0 mos and 4 yrs 11 mos
calculated from today
```

Proceed and you will see a count of patients matching your criteria so far:

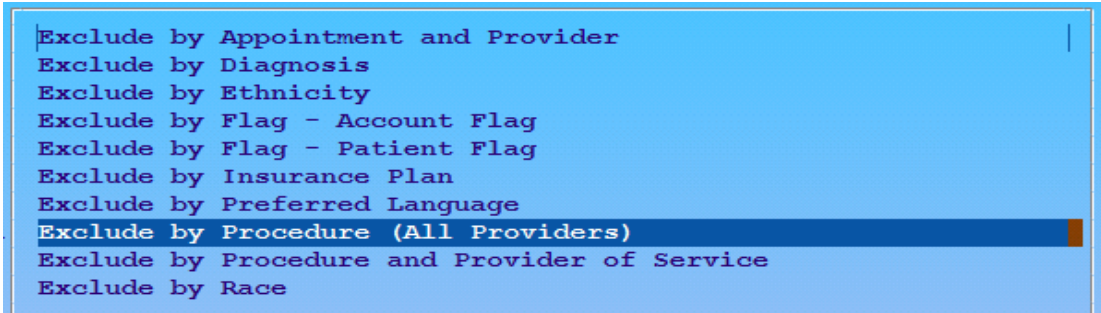
```
Recaller - Criteria Selection

1,512 Patients
1,419 Guarantors associated with these Patients
1,421 Custodians associated with these Patients

Build a list of patients based on the following criteria:
Include by Age
and
```

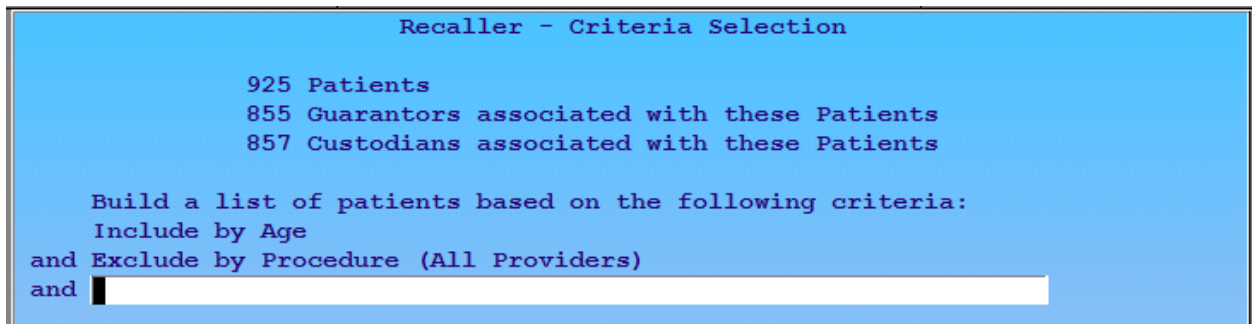
Next, to restrict this list to include only patients who still need a vision screening, you want to **exclude** patients who already had a vision screening procedure performed (CPT codes 99173, 99174, etc.):

Search for a second criteria by typing an asterisk and choose the “Exclude by Procedure (All Providers)” criteria:

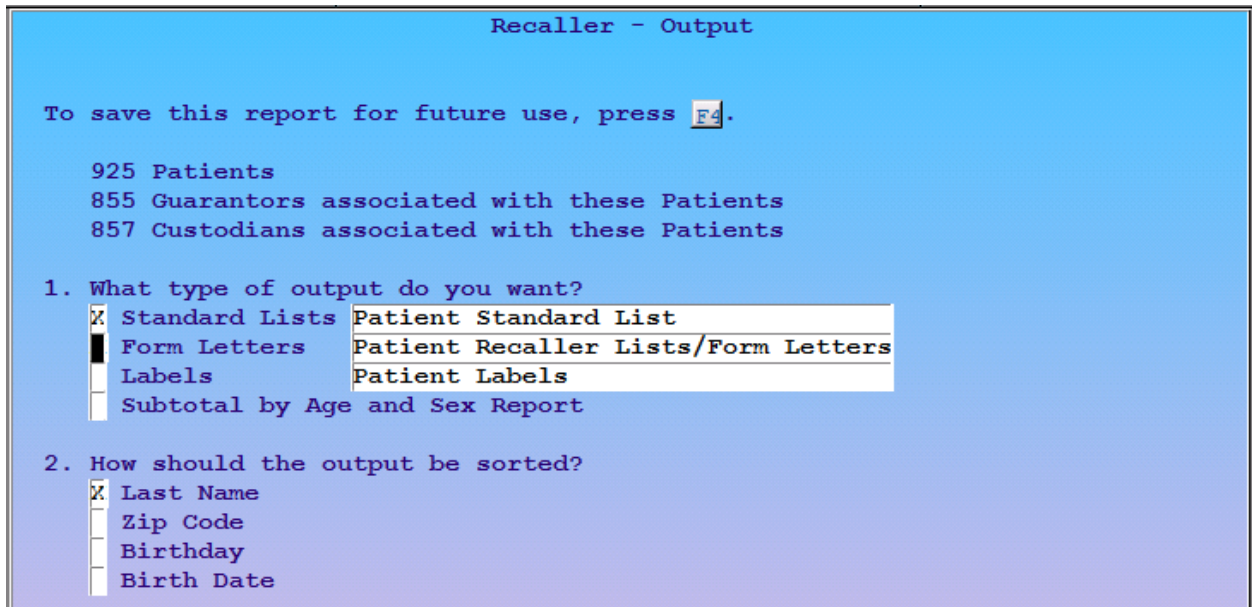


Then proceed specifying “In the past 2 years” for a time period and choosing the 99173 (vision acuity testing) and 99174 (ocular photoscreening) billable procedure codes when prompted. This excludes patients already having a vision screening in the past two years. You don't want them on your list if they aren't in need of the service.

Next, you'll return to the criteria selection screen and will see a new count of patients at the top:



This includes the patients we need to contact as they are due for a vision screening. Patients may be further segmented by clinical or billing flags, payer, primary care provider, etc. To get a list of these patients, press the <F2> “Output” button:



recaller has a variety of output options including:

- **Customizable patient list** – This allows you to generate a standard list of patients including name and contact information. Or, you have the ability to create a customizable list including the specific demographic output you want to see.
- **Form letter** – This allows you to output a form letter for each patient found in your `recaller` results. Each practice can configure its own form letters or lists using 100s of variables.
- **Mailing labels** - You can create printable labels, formatted to standard Avery sizes, or your own custom label.
- **Report** subtotaled by age and sex

Using the Patient Notification Center (`notify`), PCC practices can also configure their system to generate lists of overdue patients and send automated reminders to these patients. PCC will deliver messages to patients automatically through our partnership with TeleVox, either by phone call, text message, or e-mail. With `notify`, PCC practices can use any of the `recaller` criteria described above to create a list of patients and automatically remind patients of the needed service. Reminders will prompt the patient that they are due for a visit, asking them to call the office to schedule an appointment.

For phone call reminders, the following voice message is delivered:

“Hello, this is <Practice name> calling with a reminder that Johnny is due for a <recall reason>. Please call us at <practice phone> to schedule an appointment. We look forward to hearing from you soon.”

Here is an example of the template used for email reminders:

The email reminder template is structured as follows:

- patient's first name:** Zachariah
- recall reason is optional:** is due for a Well Visit.
Please call us to schedule an appointment.
- practice phone:** 802-555-1212
- practice location:** Physician's Computer Company (PCC)
US
20 Winooski Falls Way
Suite 7
Winooski, VT 05404
(800)722-7708

Additional elements include a "MAP TO OFFICE" button with the Google logo and a footer: "Email generated by HouseCalls™. HouseCalls is a trademarked product of TeleVox Software, Inc. All rights reserved."

And for text message reminders, the following message is sent:

"<practice name>: Johnny is due for a <recall reason>. Please contact us at <practice phone> to schedule an appointment."