**Factor 2: Monitoring the percentage of patient visits with selected clinician or team**

PCC clients should use the Partner `recaller` report to identify how many patients each clinician saw during a specified time period (the denominator) and, for those patients, how many currently have that person as the primary care clinician on file (the numerator).

In the `recaller` report, the user would type an asterisk to view a list of valid restriction criteria.
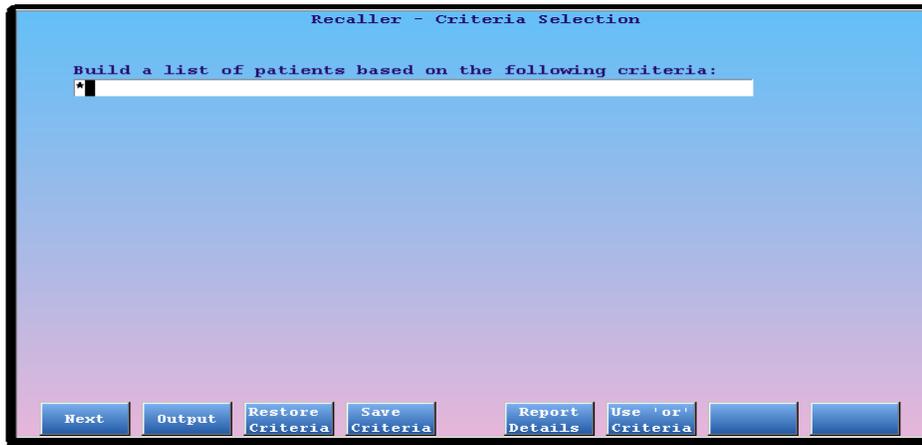
The list of valid restriction criteria will appear. The user would select "Include by Appointment and Provider":
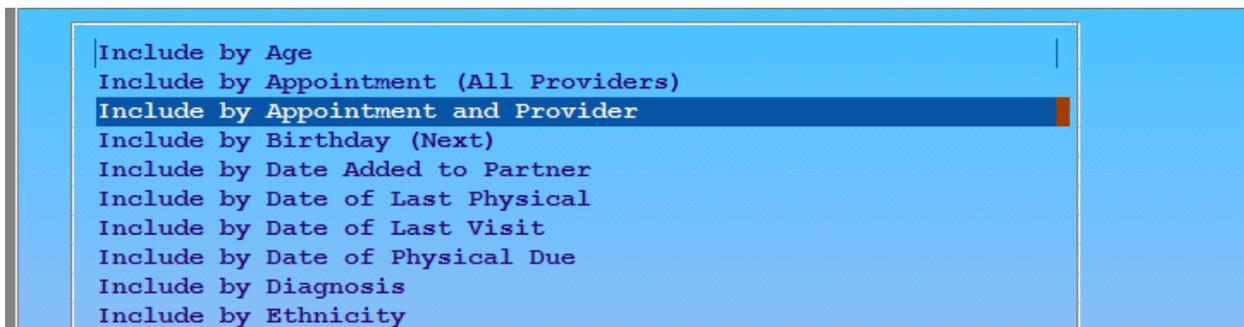
Then they would proceed, specifying a specific date range of past appointments making sure to enter at least one week's worth of appointments:

Include by Appointment and Provider

between 01/01/14   and 01/27/14
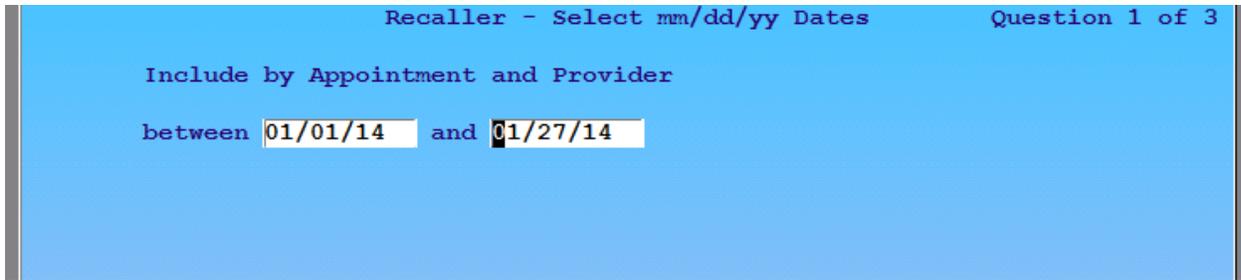
Next, the user will be prompted to select the relevant appointment types. Here, they would select all valid appointment reasons making sure to including both sick and well visit appointment types:

Recaller - Criteria Selection   Question 2 of 3

Include by Appointment and Provider

Select Visit Reasons

```
* 12mo Well Visit
* 12yr - 13yr Well Visit
* 14yr Well Visit
* 15mo Well Visit
* 15yr+ Well Visit
* 16yr Well Visit
* 17yr Well Visit
* 18mo Well Visit
* 18yr+ Well Visit
* 2mo Well Visit
* 2wk Well Visit
* 2yr Well Visit
* 3yr Well Visit
* 4mo Well Visit
* 4wk Well Visit
* 4yr Well Visit
```

| Next | Select | Select All | Select None | | List By Pattern | | Back |

Finally, the user will be prompted to select an appointment provider where they will choose just one clinician who saw patients during the appointment date range specified earlier:

Include by Appointment and Provider

Select Providers

GROUP - Casey
  * Elizabeth Casey, M.D.
  GROUP - Davidson
    James Davidson, M.D.
  GROUP - Gomez
    Kathleen W. Gomez, M.D.
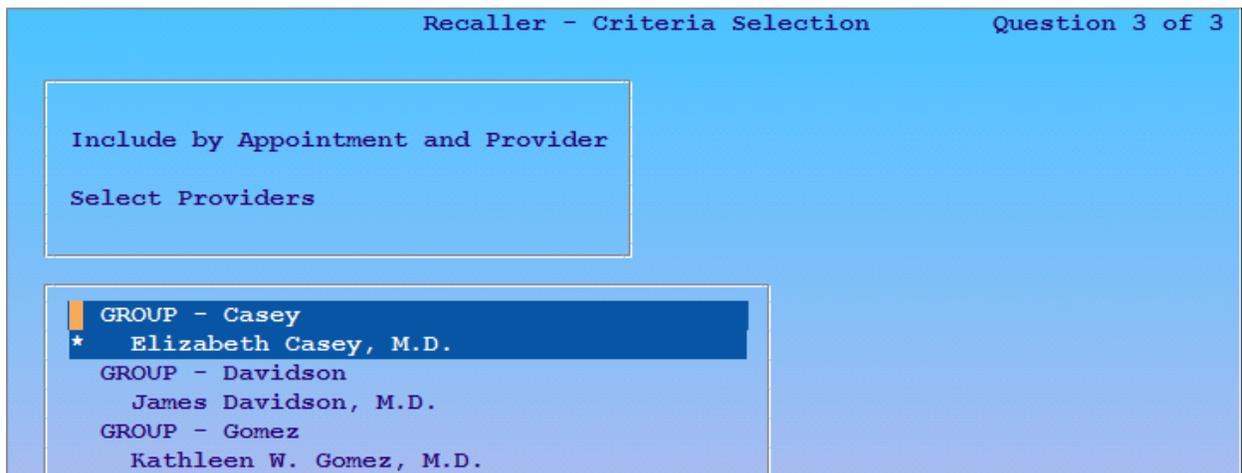
Once the appointment criteria is specified a count of patients will appear at the top indicating how many appointments the selected provider performed in the specified time period. In the example below, the 128 patients reported represents the denominator used for calculating the percentage for this measure:

Recaller - Criteria Selection

128 Patients
105 Guarantors associated with these Patients
105 Custodians associated with these Patients

Build a list of patients based on the following criteria:
Include by Appointment and Provider
and ▌
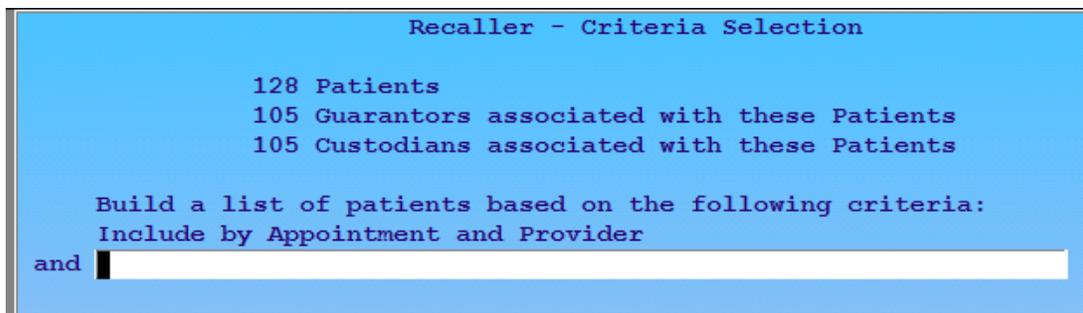
To get the numerator count, the user would add another criteria to include by primary care provider:

Include by Appointment (All Providers)
Include by Procedure (All Providers)
Include by Procedure and Provider of Service
Include by Provider (Primary Care)
Exclude by Appointment (All Providers)
Exclude by Appointment and Provider
Exclude by Procedure (All Providers)
Exclude by Procedure and Provider of Service
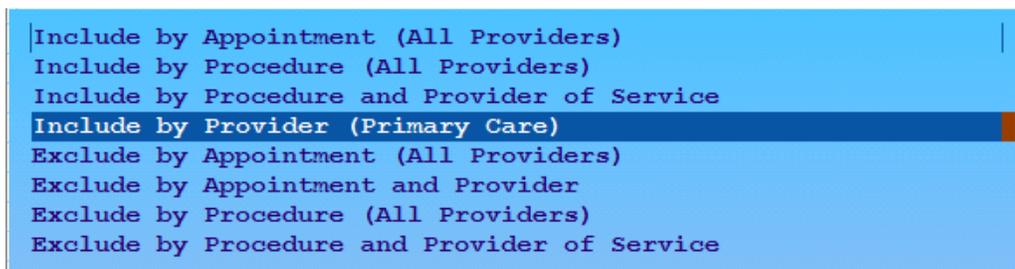
and select the same provider selected when prompted for appointments earlier:

```
Include by Provider (Primary Care)

Select Providers


  GROUP - Casey
*    Elizabeth Casey, M.D.
  GROUP - Davidson
     James Davidson, M.D.
  GROUP - Gomez
     Kathleen W. Gomez, M.D.
```
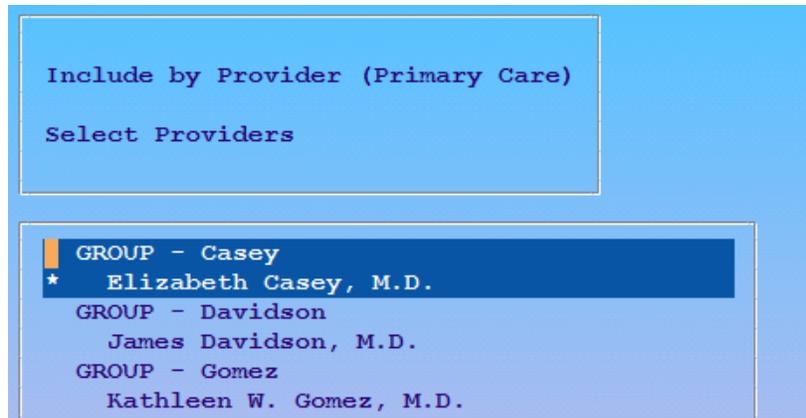
The final output includes a count of patients seen by the selected provider in the specified time period who also have that same provider as the primary care provider on file. This represents the numerator for the measure:

```
                Recaller - Criteria Selection

            121 Patients
             99 Guarantors associated with these Patients
             99 Custodians associated with these Patients

     Build a list of patients based on the following criteria:
     Include by Appointment and Provider
and Include by Provider (Primary Care)
and
```
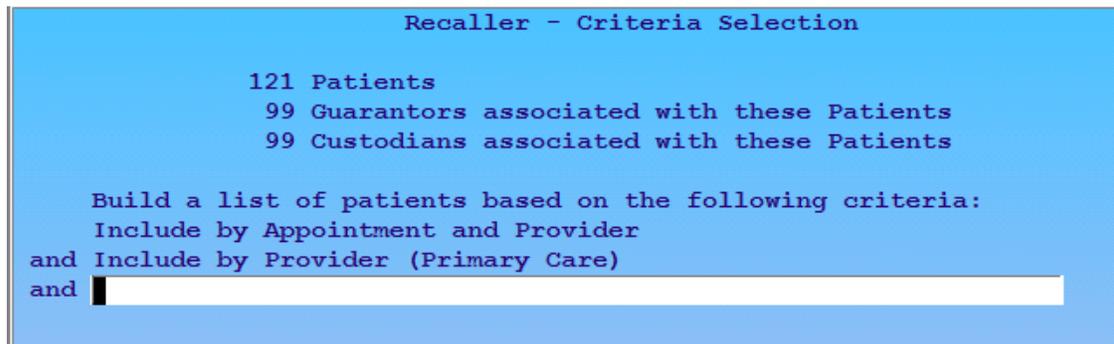
So for our example, 121 out of 128 patients (94%) seen by Dr. Casey between 1/1/14 – 1/27/14 also have Dr. Casey as the primary care provider on file.

To get the percentages for the other clinicians, the same criteria would be processed, specifying the other clinicians as the appointment and primary care provider.