

# EHR Patient Report Instructions: Allscripts Professional

Reports in Allscripts Professional EHR can be used to identify appropriate patients within the practice panel not at treatment goal. These reports enable the practice to analyze clinical data about their patients based on specific information, such as: Diagnosis, Lab results, Medications.

The following instructions provide information on how to run reports of all patients with an A1C >9% and with established cardiovascular disease. For additional questions, please reach out to your EHR vendor for technical support.

1 Click Launch in the right menu

2 Click Reporting Module

The screenshot displays the Allscripts Professional interface. The top navigation bar includes 'Appointment | Appointment Book | Caregivers | Show Canceled | Billing'. Below this, a 'Location' dropdown menu is set to '< All Locations >'. A summary bar shows 'Pending: 3 | Checked In: 0 | Started: 4 | Checked Out: 2 | Total: 9'. The left sidebar is divided into 'Main' and 'Office Admin' sections. The 'Main' section lists: Appointments, Open Encounters, Inbox, Deleted Messages, Draft Messages, Outbox, Batch Refill, Reminders, Results, Report Results, and Output Queue. The 'Office Admin' section lists: Work Log, Billing Reconciliation, Audit Encounters, Active Users, eRX Queue, PHI Report Queue, and ePHI Import Queue. The right sidebar contains 'Actions' (Menu, Send Message, Launch, Print) and 'Inboxes' (Appointments, Open Encounters, Result Encounters, Messages, Web Messages, Refill Requests, eRefill Requests, Documents, Action Items, Received Charts, Report Results, ePHI Notifications). A 'Launch' menu is open in the center, listing: Administration Module, Clinical Customization Module, Hub Connectivity Admin, Input Manager, Output Manager, and Reporting Module. Red arrows and numbered callouts indicate the steps: arrow 1 points to the 'Launch' button in the right sidebar, and arrow 2 points to the 'Reporting Module' in the 'Launch' menu.

3 Click the + (plus) sign

4 Enter a unique name

5 Enter a description

6 Click the + (plus) sign

7 Select Diagnosis

8 Select Active Problem (ICD10)

9 Click Ok

The screenshot shows the 'Reporting Module - Segments' interface. A 'Segment Properties' dialog box is open, and a 'Select Criterion' dialog box is also open. Red arrows and numbered circles (3-9) indicate the steps for creating a segment.

**Segment Properties Dialog:**

- Title:** Patients with Diabetes (Step 4)
- Description:** Patients with Diabetes (Step 5)
- Status:** Testing
- Save Criteria in Result (slow):**

**Select Criterion Dialog:**

Source	Criterion	Description
<All Sources>	Active Problem (ICD10)	Patients who have a given ICD-10 in their Active Problem list
Diagnosis (Step 7)	Active Problem (ICD10) during an encounter	Active Diagnosis ordered in an encounter
Demographics	Active Problem (SNOMED)	Patients who have a given SNOMED in their Active Problem list
Insurance Carrier	Active Problem Days (ICD10)	Patients who have a given ICD-10 in their Active Problem list and ...
	Unspecified Diagnosis	Patients who have an unspecified diagnosis in their Active Probl...

Step 8 points to the 'Active Problem (ICD10)' criterion. Step 9 points to the 'Ok' button in the 'Select Criterion' dialog.

10 Click + Add ICD-10

11 Select all conditions to add

12 Click Ok

13 Click Execute

The screenshot shows the 'Reporting Module - Segments' interface. The main window displays a list of segments on the left and a 'Segment Properties' dialog box in the center. The dialog box has two tabs: 'Segment Properties' and 'Criterion Properties'. The 'Criterion Properties' tab is active, showing a list of ICD-10 codes. The 'Parameters' section of the dialog box has a list of ICD-10 codes: 'TYPE 1 DIABETES MELLITUS (E10)' and 'TYPE 2 DIABETES MELLITUS (E11)'. The 'Add ICD-10' button is highlighted with a red circle and the number 10. The 'Delete' button is highlighted with a red circle and the number 11. The 'Ok' button is highlighted with a red circle and the number 12. The 'Execute' button in the top toolbar is highlighted with a red circle and the number 13.



14 Click the + (plus) sign

15 Enter a unique name

16 Enter a description

17 Click the + (plus) sign and select Criterion ...

Reporting Module - Reports

Report Properties

General

Title: A1C over 9% Status: Testing

Description: Patients with Diabetes

Segment: Patients with Diabetes

Keep for: 180 days

Report

Criteria Set ...

Criteria Set from Library ...

Criterion ...

Save Criteria	Status
No	Test
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled

18 Select Labs

19 Select Labs Result Value, Most Recent (LOINC)

20 Click Ok

Reporting Module - Reports

Reports Report Properties

Select Criterion

Source	Criterion	Description
<All Sources>	Lab Result - Abnormal, Data Range (Lab Catalog)	Patients who have had a given Lab Test from the Lab Catalog ..
CC/HPI	Lab Result - Abnormal, Data Range (LOINC)	Patients who have had a given Lab Test from the LOINC Catal..
History	Lab Result - Abnormal, Data Range, Caregiver (..	Patients who have had a given Lab Test from the Lab Catalog ..
Rx	Lab Result - Abnormal, Data Range, Caregiver (..	Patients who have had a given Lab Test from the LOINC Catal..
Vitals	Lab Result - Abnormal, Days (Lab Catalog)	Patients who have had a given Lab Test from the Lab Catalog ..
Diagnosis	Lab Result - Abnormal, Days (LOINC)	Patients who have had a given Lab Test from the LOINC Catal..
Labs	Lab Result (Lab Catalog)	Patients who have had a given Lab Test from the Lab Catalog ..
Procedur	Lab Result (LOINC)	Patients who have had a given Lab Test from the LOINC Catalo ..
Appointment	Lab Result Value Equals, Date Range (Lab Catal..	Patients who have had a given result value for a Lab Test from ..
Referrals	Lab Result Value Equals, Date Range (LOINC)	Patients who have had a given result value for a Lab Test from ..
Demographic	Lab Result Value Equals, Days (Lab Catalog)	Patients who have had a given result value for a Lab Test from ..
Encounter	Lab Result Value Equals, Days (LOINC)	Patients who have had a given result value for a Lab Test from ..
Immunizations	Lab Result Value, Date Range (Lab Catalog)	Patients who have had a given Lab Test from the Lab Catalog r..
Miscellaneous	Lab Result Value, Date Range (LOINC)	Patients who have had a given Lab Test from the LOINC Catalog
	Lab Result Value, Date Range, Caregiver (Lab C..	Patients who have had a given Lab Test from the Lab Catalog r..
	Lab Result Value, Date Range, Caregiver, (LOINC)	Patients who have had a given Lab Test from the LOINC Catalog
	Lab Result Value, Days (Lab Catalog)	Patients who have had a given Lab Test from the Lab Catalog r..
	Lab Result Value, Days (LOINC)	Patients who have had a given Lab Test from the LOINC Catalog
	Lab Result Value, Most Recent (Lab Catalog)	Patients who have had a given Lab Test from the Lab Catalog r..
	Lab Result Value, Most Recent (LOINC)	Patients who have had a given Lab Test from the LOINC Catalog
	Lab Result Value, Most Recent, Caregiver (..	Patients who have had a given Lab Test from the Lab Catalog r..

18

19

20

Ok Cancel

Ok Cancel

21 Set the operator logic to  $\geq$

22 Enter 9

23 Select HgbA1C Bld (Hemoglobin...)

24 Click Ok

Reporting Module - Reports

Report Properties

Select Criterion

Source	Criteria
<All Sources>	Lab
CC/HPI	Lab
History	Lab
Rx	Lab
Vitals	Lab
Diagnosis	Lab
Labs	Lab
Procedures	Lab
Appointments	Lab
Referrals	Lab
Demographics	Lab
Encounter	Lab
Immunizations	Lab
Miscellaneous	Lab

Criterion Properties

General

Lab Result Value, Most Recent

Patients who have had a given Lab Test from the LOINC Catalog and the most recent result value is in the given range

Mark Negative

All the patients that do NOT meet the selection will be included in the result

Parameters

Value  $\geq$  9

Lab Test is Hgb A1c MFr Bld (Hemoglobin A1c/Hemoglobin A1c MFr Bld Calc (Hemoglobin A1c/Hemoglobin A1c MFr Bld Elph (Hemoglobin A1c/Hemoglobin A1c MFr Bld HPLC (Hemoglobin A1c/Hemoglobin A1c MFr Bld

Ok Cancel

25 Click Ok

26 Click Execute

The screenshot shows the 'Reporting Module - Reports' interface. A report configuration dialog box is open, titled 'Report Properties'. The dialog has two main sections: 'General' and 'Report'. In the 'General' section, the 'Title' is 'A1C over 9%', the 'Status' is 'Testing', and the 'Description' is 'Patients with Diabetes'. There are checkboxes for 'High Priority', 'Restricted Access', and 'Preventative Health Reminder'. The 'Segment' is 'Patients with Diabetes' and 'Keep for' is '180 days'. In the 'Report' section, there is a flowchart showing the logic: 'A1C over 9%' leads to 'Lab Result Value Most Recent Value >= 9 Lab Test is Hgb A1c MFr Bld H', which leads to 'Resulting Patient List'. Below the flowchart, there is a text box that says 'Return all the patients based on the segment "Patients with Diabetes"'. At the bottom right of the dialog, there are 'Ok' and 'Cancel' buttons. A red circle with the number '26' points to the 'Execute' button in the main interface, and another red circle with the number '25' points to the 'Ok' button in the dialog.

Name	Save Criteria	Status
Diabetic Patients	lo	Test
Disease Management Asthma -- P	lo	Enabled
Disease Management Asthma -- P	lo	Enabled
Disease Management Asthma -- P	lo	Enabled
Disease Management COPD -- Mil	lo	Enabled
Disease Management COPD -- Mo	lo	Enabled
Disease Management COPD -- Sev	lo	Enabled
Disease Management COPD -- Ver	lo	Enabled
Disease Management COPD -- Rea	lo	Enabled
Disease Management Depression	lo	Enabled
Disease Management Depression	lo	Enabled
Disease Management Depression	lo	Enabled
Disease Management Depression	lo	Enabled



**i** Examples of ICD-10 codes related to CVD may be found on the final page

**27** Click the + (plus) sign

**28** Enter a unique name

**29** Enter a description

**30** Click the + (plus) sign and select Criterion ...

The screenshot shows the 'Reporting Module - Segments' application. On the left, a tree view shows 'Patient Report' > 'Segments' selected. The main area displays a list of segments with a '+' icon highlighted by a red arrow and callout '27'. A 'Segment Properties' dialog box is open on the right. In the 'General' section, the 'Title' field contains 'Patients with Diabetes and established...' and the 'Description' field contains 'Patients with Diabetes and established...'. Red arrows and callouts '28' and '29' point to these fields. In the 'Report' section, the 'Criteria Set' field contains 'established CVD'. A red arrow and callout '30' point to a '+' icon in the 'Criteria Set' field. The dialog has 'Ok' and 'Cancel' buttons at the bottom right. The system tray at the bottom shows 'System Manager', 'NO', and 'enabled'.

31 Select Diagnosis

32 Select Active Problem (ICD10)

33 Click Ok

Reporting Module - Segments

Segments

Caregiver

Segment Properties

Source	Criterion	Description
<All Sources>	Active Problem (ICD10)	Patients who have a given ICD-10 in their Active Problem list
Diagnosis	Active Problem (ICD10) during Encoun...	Active Diagnosis ordered in an encounter
Demographic	Active Problem (SNOMED)	Patients who have a given SNOMED in their Active Problem list
Insurance Carrier	Active Problem Days (ICD10)	Patients who have a given ICD-10 in their Active Problem list and ..
	Unspecified Diagnosis	Patients who have an unspecified diagnosis in their Active Probl...

Ok Cancel

34 Select + Add ICD-10

35 Select the desired diagnoses

36 Click Ok

The screenshot displays the 'Reporting Module - Segments' interface. A 'Criterion Properties' dialog box is open, showing the 'Parameters' section where ICD-10 codes are being added. The list includes: TYPE 1 DIABETES MELLITUS (E10), TYPE 2 DIABETES MELLITUS (E11), ANGINA PECTORIS (I20), ACUTE MYOCARDIAL INFARCTION (I21), and SUBSEQUENT MYOCARDIAL INFARCTION (I22). The dialog box has 'Ok' and 'Cancel' buttons. The background shows a list of segments and a table with 'Save Criteria' and 'Status' columns.

Save Criteria	Status
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled
No	Enabled



37 Click Ok

38 Click Execute

Reporting Module - Reports

Reports

Caregiver < All Caregivers >

Name

- Diabetic Patients
- Disease Management Asthma -- Patients
- Disease Management Asthma -- Patients
- Disease Management Asthma -- Patients
- Disease Management COPD -- Mild COPD
- Disease Management COPD -- Moderate
- Disease Management COPD -- Severe COPD
- Disease Management COPD -- Very Severe
- Disease Management COPD -- Readmitted
- Disease Management Depression -- Patient
- Disease Management Depression -- Patient
- Disease Management Depression -- Patient
- Disease Management Depression -- Patient

Report Properties

Title: A1C over 9% Status: Testing

Description: Patients with Diabetes and established CVD

High Priority  Restricted Access  Preventative Health Reminder

Segment: Patients with Diabetes and established CVD

Keep for: 180 days  Save Criteria in Result (slower)

Report

A1C over 9%

A1C over 9%

Lab Result Value Most Recent  
Value >= 9  
Lab Test is Hgb A1c MFr Bld H

Resulting Patient List

Return all the patients based on the segment "Patients with Diabetes and established CVD"

Ok Cancel

Criteria	Status
Test	Test
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled
Enabled	Enabled



## Examples of ICD-10 codes related to CVD

I20.0 Unstable angina

I21.0 ST elevation (STEMI) myocardial infarction of anterior wall

I21.1 ST elevation (STEMI) myocardial infarction of inferior wall

I21.2 ST elevation (STEMI) myocardial infarction of other sites

I21.3 ST elevation (STEMI) myocardial infarction of unspecified site

I21.4 Acute subendocardial myocardial infarction

I22.0 Subsequent myocardial infarction of anterior wall

I22.1 Subsequent myocardial infarction of inferior wall

I22.8 Subsequent myocardial infarction of other sites

I25 Chronic ischemic heart disease

I25.1 Atherosclerotic heart disease of native coronary artery

I25.5 Ischemic cardiomyopathy

I25.6 Silent myocardial ischemia

I42.0 Dilated cardiomyopathy

I46.2 Cardiac arrest due to underlying condition

I46.8 Cardiac arrest due to other underlying condition

I46.9 Cardiac arrest, unspecified

I50 Heart Failure

I50.1 Left ventricular failure

I63.3 Cerebral infarction due to thrombosis of cerebral arteries

I65.2 Occlusion and stenosis of carotid artery

I66.0 Occlusion and stenosis of middle cerebral artery

I67.2 Cerebral atherosclerosis

I70.0 Atherosclerosis of aorta

I70.2 Atherosclerosis of native arteries of the extremities

I71.1 Thoracic aortic aneurysm, ruptured

I71.2 Thoracic aortic aneurysm, without rupture

