



Appendix B: EMR Optimization – Critical Result Test and Report Values

This appendix includes the following sections:

- 1) Tasking Directly from the Lab Folder and Responding to Labs
- 2) End of day Clinic reporting for Task type 'Critical Results Follow-up' (**Not completed / Outstanding Tasks only**)
 - Date Range (report Step 2) – leave as default for no date to report all outstanding items regardless of date
 - Tasks category (report Step 6) – select Not Completed Tasks Only to produce Outstanding Tasks report
- 3) Quarterly Primary Care Regional Reporting for Task type 'Critical Results Follow-up' (**Completed Tasks only**)

1) Tasking Directly from the Lab Folder and Responding to Labs

The screenshot displays the EMR interface for Patient, Mary. The top section shows a list of lab results with columns: Received, Patient, Tests, Abnormal Results, Reviewed, and Contact Patient. The 'LIPOPROTEIN PROFILE' test is highlighted. Below the list, there are buttons for 'Assign Provider', 'Unreviewed', 'Patient Follow-ups', 'Review History', and 'Print'. A red box and arrow point to the 'Tasks' button in the top right corner of the interface.

Lab Results Table:

Received	Patient	Tests	Abnormal Results	Reviewed	Contact Patient
01-Aug-2013 11:13 AM	Matched	Midstream Urine		Not Reviewed	
10-Sep-2013 10:18 AM	Matched	LIPOPROTEIN PROFILE	Cholesterol, LDL Chole...	Not Reviewed	
02-May-2013 8:12 AM	Matched	Throat Swab		Not Reviewed	
27-Jun-2013 1:10 PM	Matched	Dermatophyte culture, CSF for fungi		Not Reviewed	
24-Apr-2013 3:47 PM	Matched	THYROID FUNCTION, Glycosylated h...	PLT, %Eosinophils, ...	Not Reviewed	

Patient Information:

Patient Name: Patient, Mary
Health #: 123456789
Birthdate: 03-Mar-1945
Gender: Female

Lab Order #: 13KB973030033200
Reported By: DSM-SOH
Ordered By: DAVID A. ROSS
CC:
Collection Date: 10-Sep-2013 9:20 AM
Reported Date: 10-Sep-2013 10:18 AM
Updated On: 10-Sep-2013 10:24 AM

LIPOPROTEIN PROFILE (F)

Appearance: Not done when triglycerides <4.5 mmol/L. 10-Sep-2013 10:18 AM

Fasting Specimen





Next Step with Tasking:

New Task: Patient, Mary

Assign Task To: **Kildonan Medical Centre**

Physician: **Dyck, Clayton (chdyck)**

Task: **Critical Results Follow-up**

Priority: **Very Urgent**

Due Date: **10/03/2013**

Attachments (1) **Checkout**

Note

The lab result has been attached to the task

OK Cancel

Designated PCP reviews the lab from the PCP lab folder (updates Description/Notes text when result is 'previewed')

boleszynski

Received	Matched	Patient	Tests	Abnormal Results	Reviewed	Contact Patient
31-Jul-2013 10:01 AM	Matched		Midstream Urine X3		Not Reviewed	
03-May-2013 5:21 PM	Matched	Patient, Mary	THYROID FUNCTION, PLASMA/SERUM ...	%Basophils, Basophi...	Not Reviewed	
01-Aug-2013 11:13 AM	Matched		Midstream Urine		Not Reviewed	
10-Sep-2013 10:18 AM	Matched		LIPOPROTEIN PROFILE	Cholesterol, LDL Chole...	Not Reviewed	
02-May-2013 8:12 AM	Matched		Throat Swab		Not Reviewed	

Assign Provider ☒ Unreviewed ☒ Patient Follow-ups Review History

Review

Follow Up Request

Print

Locate Patient

Patient Name: Patient, Mary Health #: 123456789 Birthdate: 25-Mar-1994 Gender: Female

Lab Order # Reported By: SOH Collection Date: 03-May-2013 4:29 PM
Ordered By: DAVID A. ROSS Reported Date: 03-May-2013 4:40 PM
CC: Updated On: 26-Aug-2013 3:12 PM

Flags	Results	Ref Range
<input checked="" type="checkbox"/> AUTOMATED CBC (F)		
WBC	7.1	4.5 - 11 x10E9/L 03-May-2013 4:40 PM
RBC	4.80	3.8 - 5.2 x10E12/L 03-May-2013 4:40 PM
HGB	139	120 - 160 g/L





From the Virtual Chart the date the lab was reviewed is displayed

Quick Patient Summary

Virtual Chart | Patient Summary | Encounter Summary

Patient: Patient, Mary
19 years old female

Letters/Forms Patient Notes Generated Letters Tasks Labs Documents

Search Patient Chart

Date Filter: --All Items--

Date	Type	Note	Provider	Reviewed
03-May-2013	Labs	AUTOMATED CBC, PLASMA...	Ross, David A	16-Sep-2013

The date the lab was reviewed is identified in the virtual chart

When the Lab Viewer is opened from the virtual chart the name of the PCP who reviewed the lab is displayed as well at the date the lab was displayed

Lab Viewer

Patient Name: Patient, Mary Health #: 123456789 Birthdate: 25-Mar-1994 Gender: Female

Lab Order #: Reported By: SOH Collection Date: 03-May-2013 4:29 PM
Ordered By: DAVID A. ROSS Reported Date: 03-May-2013 4:40 PM
CC: Reviewed: 16-Sep-2013 by boleszynski Updated On: 26-Aug-2013 3:12 PM

Flags	Results	Ref Range
AUTOMATED CBC (F)		
WBC	7.1	4.5 - 11 x10E9/L
RBC	4.80	3.8 - 5.2 x10E12/L
HGB	139	120 - 160 g/L
HCT	0.411	0.35 - 0.47 L/L

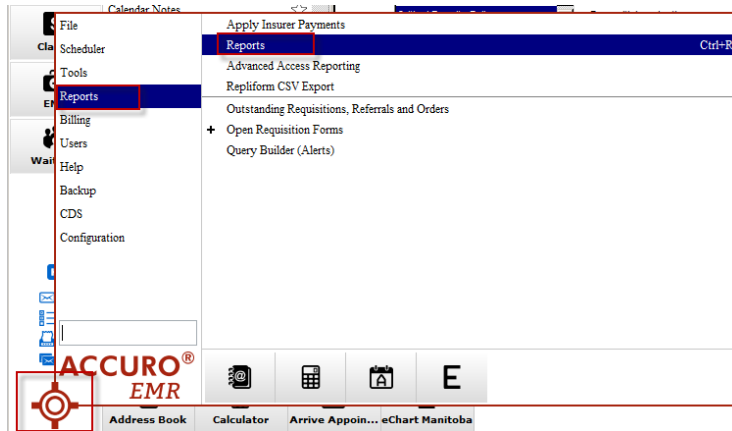
The date the lab was marked as reviewed as well as the name of the reviewer is identified in the Lab Viewer on the virtual Chart



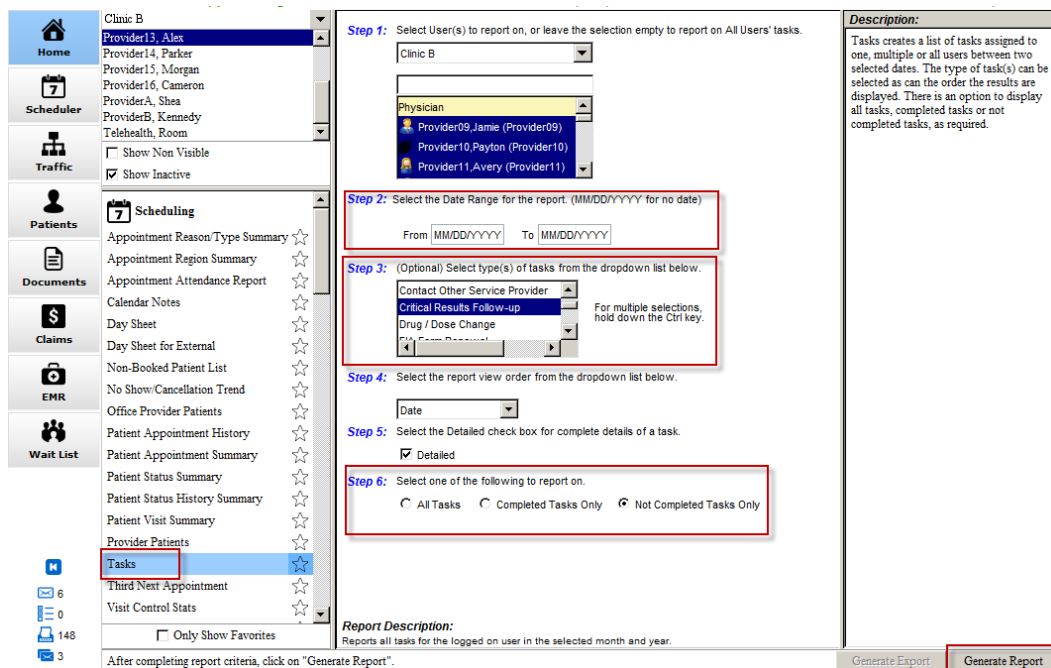


2) End of day Clinic reporting for Task Type 'Critical Result Follow up' (Not Completed/Outstanding Tasks only)

To report on critical value tasks Select the Accuro target> Choose Reports> Reports



Select those Primary Care Providers / Clinicians on which you wish to report





3) Quarterly Primary Care regional reporting for Task type 'Critical Result Follow-up' (Completed Tasks only)

Select those Primary Care Providers / Clinicians on which you wish to report

The screenshot shows the 'Tasks' reporting interface. On the left is a navigation menu with categories: Home, Scheduler, Traffic, Patients, Documents, Claims, EMR, and Wait List. Under 'Patients', the 'Tasks' option is selected and highlighted. The main area contains six steps for configuring the report:

- Step 1:** Select User(s) to report on, or leave the selection empty to report on All Users' tasks. A dropdown shows 'Clinic B' and a list of providers: Provider09, Jamie (Provider09); Provider10, Payton (Provider10); and Provider11, Avery (Provider11).
- Step 2:** Select the Date Range for the report. (MM/DD/YYYY for no date). Fields for 'From' and 'To' dates are provided.
- Step 3:** (Optional) Select type(s) of tasks from the dropdown list below. The list includes 'Contact Other Service Provider', 'Critical Results Follow-up' (selected), 'Drug / Dose Change', and 'PA Exam Request'. A note states: 'For multiple selections, hold down the Ctrl key.'
- Step 4:** Select the report view order from the dropdown list below. A 'Date' dropdown is shown.
- Step 5:** Select the Detailed check box for complete details of a task. The 'Detailed' checkbox is checked.
- Step 6:** Select one of the following to report on. Radio buttons are present for 'All Tasks', 'Completed Tasks Only' (selected), and 'Not Completed Tasks Only'.

At the bottom, a 'Report Description' states: 'Reports all tasks for the logged on user in the selected month and year.' Below this is the instruction: 'After completing report criteria, click on "Generate Report".'

On the right side, a 'Description' box explains: 'Tasks creates a list of tasks assigned to one, multiple or all users between two selected dates. The type of task(s) can be selected as can the order the results are displayed. There is an option to display all tasks, completed tasks or not completed tasks, as required.'

At the bottom right, there are two buttons: 'Generate Export' and 'Generate Report'.

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