



**OP** EDUCATIONAL  
EXPERIENCE

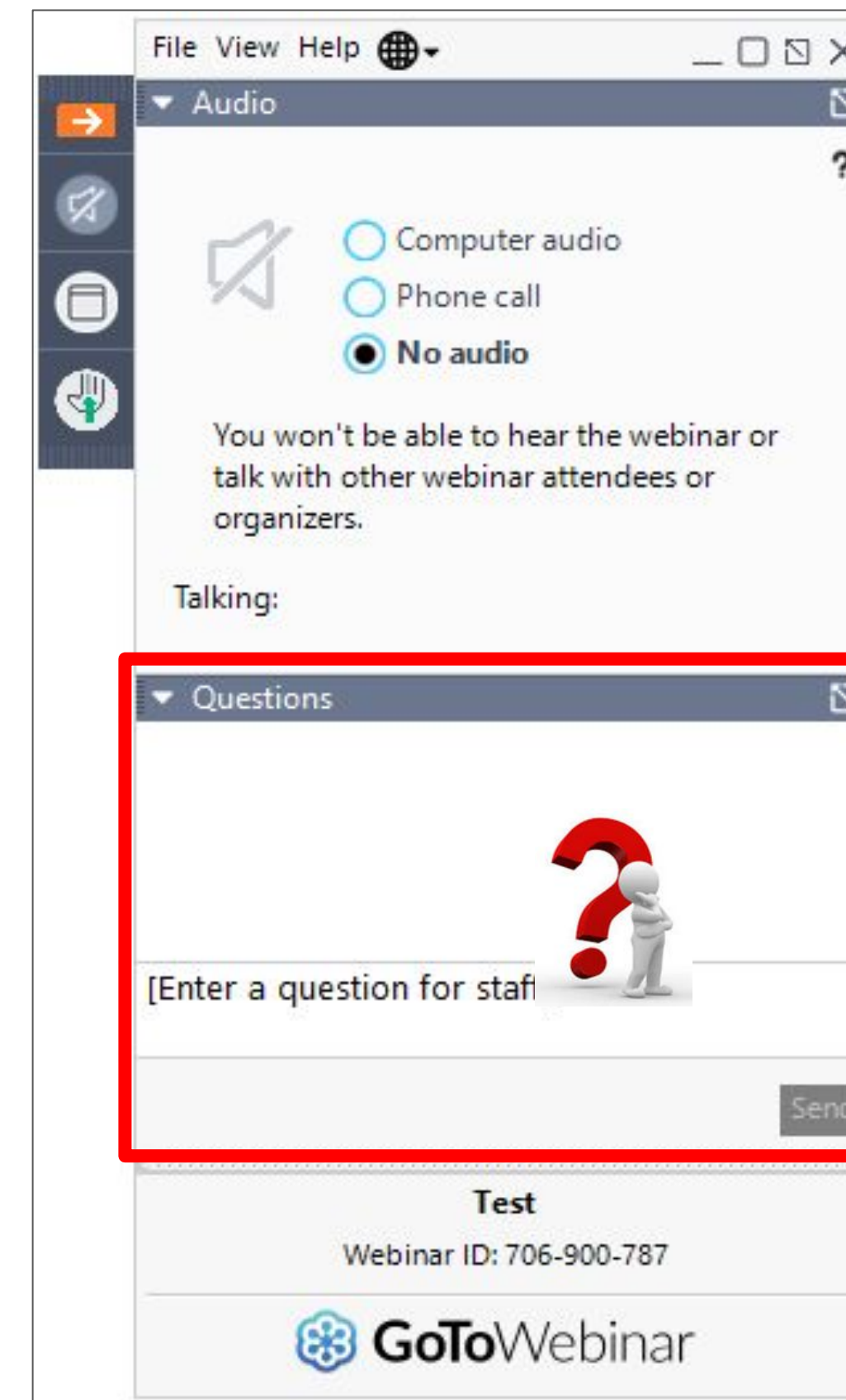
## **COVID-19 Survival Checklist Webinar Series**

Recalls using the DAR

# Welcome to COVID Survival Series - Recalls using the DAR

Audience: All

- Attendees will be muted. If you have a question, enter it into the **Questions** box.
- Any unanswered question(s) will be communicated to the Webinar attendees via email.



# Objectives

In this session, you will learn how to use the Demographic Analysis/Recall to:

- Run recalls from Patient Demographics
- Run Clinical recalls
- Run Care Plan recalls
- Run Vaccine recalls
- Send messages to patients regarding recalls



# Activity 1: General Messages & Recalls



# Scenario

## **Send out Birthday/Well Visit reminders**

We want to reach out and wish the kiddos at our practice a Happy Birthday while also reminding the parents of the need for an upcoming well visit.

Let's see how we can simply and easily do this using the Demographic Analysis and Recall (DAR)!

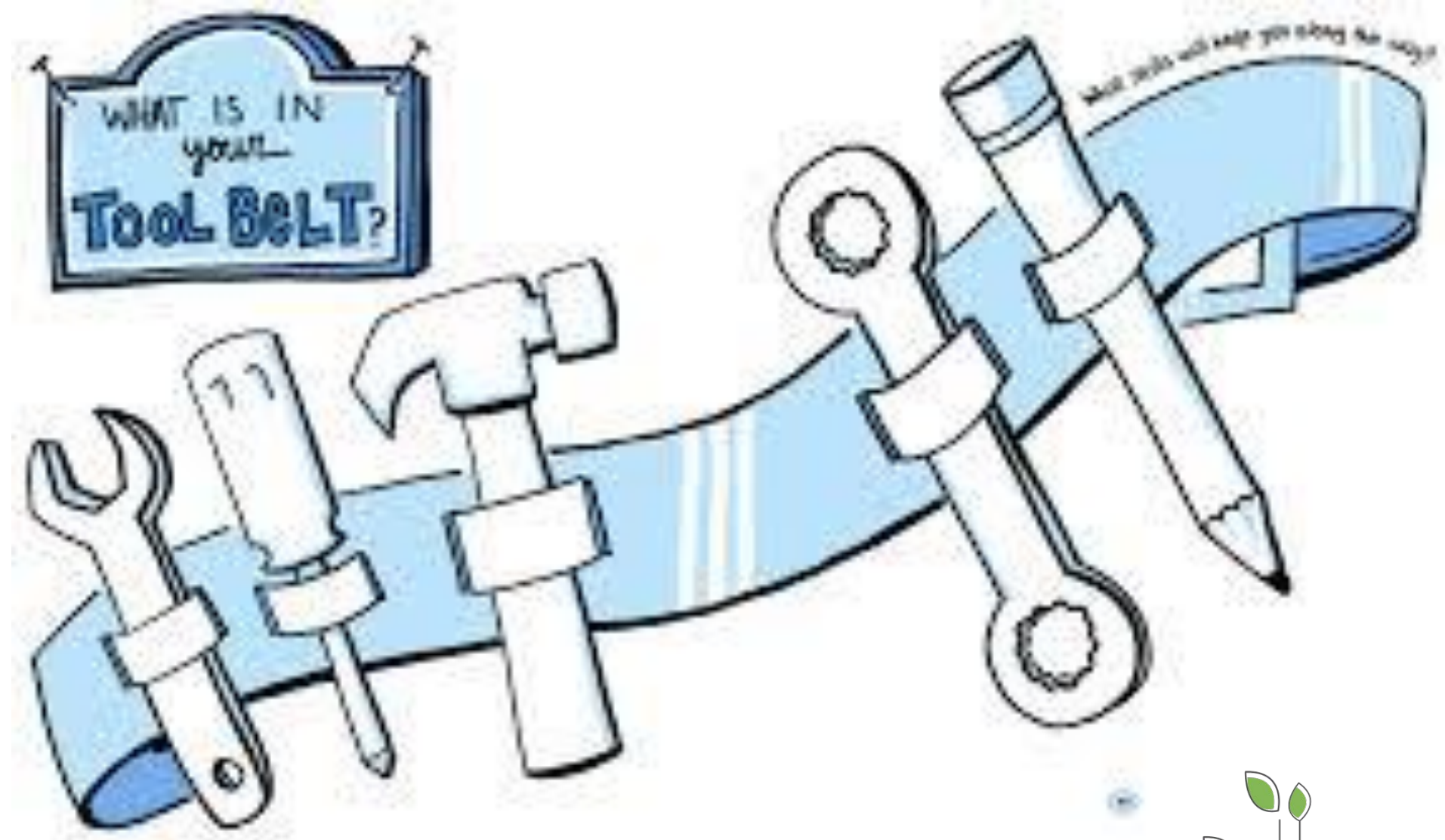
# Let's Get Started!

## Navigate to: Practice Management > Demographic Analysis/Recall

First let's create out Patient Demographic List (PDL)

Some filters commonly used:

- Age
- PCP
- VFC Status
- Insurance Carrier
- Zip Code



# General Messages & Recalls

For our selected scenario we want to narrow the results down to patients that were born in a specific Month.

Visit dates:  
☐ No date restrictions  
☒ At least one visit since: 3/28/2020

Drag column header here to group by that

	Pat #	Patient	Sex
<input checked="" type="checkbox"/> (All)			
<input type="checkbox"/> (Sorted)			
<input checked="" type="checkbox"/> Pat #			
<input checked="" type="checkbox"/> Patient			
<input type="checkbox"/> Patient FNm			
<input type="checkbox"/> Patient LNm			
<input checked="" type="checkbox"/> Sex			
<input checked="" type="checkbox"/> Age			
<input checked="" type="checkbox"/> Birth Date			
<input type="checkbox"/> Birth Day			
<input type="checkbox"/> Address			
<input type="checkbox"/> Address Line 2			
<input type="checkbox"/> City			
<input type="checkbox"/> State			
<input type="checkbox"/> ZipCode			
<input checked="" type="checkbox"/> Home Phone			
<input type="checkbox"/> Day Phone			
<input type="checkbox"/> Cell Phone			
<input checked="" type="checkbox"/> Patient Email			
<input checked="" type="checkbox"/> Race			
<input checked="" type="checkbox"/> Ethnicity			
<input type="checkbox"/> Language			

Custom Filter

Show rows where:

Birth Day

like June%

☒ AND ☐ OR

Use \_ to represent any single character  
Use % to represent any series of characters

OK Cancel



# Outcome

We now have a filtered list of patients we want to contact.

Demographic Analysis and Recall ✕

Print Grid ☐ Highlighted only Print Letters Send Messages Export XLS Export CDA

Patient Demographics Clinical Recall Care Plan Recall Vaccine Status Recall Vaccines Given

Visit dates:  
☒ No date restrictions  
☐ At least one visit since:

☒ Active patients only  
☐ Show future appts  
☐ Exclude patients with appts

Search ☐ expand grid

Drag a column header here to group by that column

	Pat #	Patient	Sex	Age	Birth Date	Home Phone	Patient Email	Race
▶	99	TESTPATIENT, MARY	F	4	5/16/2015	216-555-1213		
	100	TESTPATIENT, JOHN	M	14	1/1/2006	216-555-1213		



# Takeaway Action Plan

- ❑ Use the Patient Demographic List to send out General Messages and reminders based off of:
  - ❑ Birth Month
  - ❑ Age
  - ❑ Insurance Carrier
  - ❑ Zip Code

Or use combinations of different values to create a PDL



## Activity 2: Creating a Clinical Recall List



# Scenario

**How many active patients have asthma and haven't been to the office in the last 6 months?**

We want to reach out and encourage our asthmatic patients to come in to the office for a visit.

Let's see how we can generate this easily by using the Demographic Analysis and Recall (DAR)!



# Let's Get Started!

We'll start off with creating a PDL, but with a different set of criteria.

The screenshot shows a web application window titled "Demographic Analysis and Recall". At the top, there are several buttons: "Print Grid", "Highlighted only" (with an unchecked checkbox), "Print Letters", "Send Messages", "Export XLS", and "Export CDA". Below these are five tabs: "Patient Demographics" (which is selected and highlighted in blue), "Clinical Recall", "Care Plan Recall", "Vaccine Status Recall", and "Vaccines Given".

Under the "Patient Demographics" tab, there are two main sections. The left section is labeled "Visit dates:" and contains two radio buttons: "No date restrictions" (unchecked) and "At least one visit since:" (checked). The "At least one visit since:" option has a date input field showing "4/27/2017" with a dropdown arrow. The right section contains three checkboxes: "Active patients only" (checked), "Show future appts" (unchecked), and "Exclude patients with appts" (unchecked). To the right of these checkboxes is a "Search" button and an "expand grid" checkbox (unchecked).

Below the filters is a grey bar with the text "Drag a column header here to group by that column". At the bottom, there is a table header with the following columns: "Pat #", "Patient", "Sex", "Age", "Birth Date", "Home Phone", and "Patient Email".

# What stuck with you?

- ❑ We learned how to use the Clinical Recall to send out reminders based off of:
  - ❑ Problems
  - ❑ Med Allergies
  - ❑ Medications
  - ❑ Lab Results

We can use grouping, sorting, and filtering to further narrow or organize these results using the same skills used on the Patient Demographic List



# Takeaway Action Plan

- ❑ Create Recall lists for patients with:
  - ❑ Asthma
  - ❑ ADD/ADHD
  - ❑ Diabetes
- ❑ Use the other categories to zero in on specific patient groups
  - ❑ Taking a specific medication
  - ❑ Hi/Low results for lab tests



## Activity 3: Creating a Care Plan Recall List



# Scenario

## **How many active patients are due or overdue for a Well Child Check?**

As a practice, we want to do the very best we can to keep our kids healthy and up to date on their vaccinations and other diagnostic tests that occur with their regularly scheduled Well visit.

Let's see how we can generate this easily by using the Demographic Analysis and Recall (DAR)!

# Let's Get Started!

We'll start off with creating a PDL, but with a different set of criteria.

The screenshot shows a web-based application window titled "Demographic Analysis and Recall". At the top, there are several buttons: "Print Grid", "Highlighted only" (with a checkbox), "Print Letters", "Send Messages", "Export XLS", and "Export CDA". Below these are five tabs: "Patient Demographics" (which is selected), "Clinical Recall", "Care Plan Recall", "Vaccine Status Recall", and "Vaccines Given".

Under the "Patient Demographics" tab, there are two main sections. The left section is titled "Visit dates:" and contains two radio buttons: "No date restrictions" and "At least one visit since: 4/27/2017" (which is selected). The right section contains three checkboxes: "Active patients only" (checked), "Show future appts" (unchecked and highlighted with a dashed border), and "Exclude patients with appts" (checked). There is also an "expand grid" checkbox. A "Search" button is located to the right of these checkboxes.

Below the filters is a grey bar with the text "Drag a column header here to group by that column". At the bottom, there is a table header with the following columns: "Pat #", "Patient", "Sex", "Age", "Birth Date", "Home Phone", and "Patient En".



# What stuck with you?

- ❑ We learned how to use the Care Plan Recall to send out reminders based off of Bright Futures Guidelines
- ❑ We can recall a patient that qualifies for a Care Plan even if they aren't enrolled
- ❑ Always set your Recall Date at least a few weeks in the future.



# Takeaway Action Plan

- ❑ Create Recall lists for patients:
  - ❑ Behind on Preventive Visits
  
- ❑ Create/Update Care Plans for other conditions the practice wants to monitor:
  - ❑ Asthma
  - ❑ ADHD
  - ❑ Weight Management
  - ❑ Anxiety/Depression
  - ❑ Diabetes

\*\*Don't have the time or know how to create your own Care Plans? Reach out to OP and let us know. We will contact with you to create Care Plans for the practice!



## Activity 4: Creating a Vaccine Status Recall List





# Scenario

## **How many active patients are due or overdue for a HPV shot?**

As a practice, we want to do the very best we can to keep our kids healthy and up to date on their vaccinations as possible.

Let's see how we can generate this easily by using the Demographic Analysis and Recall (DAR)!

# Let's Get Started!

We'll start off with creating a PDL, but with a different set of criteria.

The screenshot shows the 'Demographic Analysis and Recall' window. At the top, there's a title bar with the 'op' logo and a close button. Below the title bar is a row of buttons: 'Print Grid', 'Highlighted only' (with a checkbox), 'Print Letters', 'Send Messages', 'Export XLS', and 'Export CDA'. A tabbed interface follows, with 'Patient Demographics' selected. Other tabs include 'Clinical Recall', 'Care Plan Recall', 'Vaccine Status Recall', and 'Vaccines Given'. Under the 'Patient Demographics' tab, there are two sections. The left section is for 'Visit dates' with options: 'No date restrictions' (radio button), 'At least one visit since: 4/27/2018' (radio button and date picker), and a 'Search' button. The right section has three checkboxes: 'Active patients only' (checked), 'Show future appts' (unchecked), and 'Exclude patients with appts' (checked). There is also an 'expand grid' checkbox. Below these sections is a grey bar with the text 'Drag a column header here to group by that column'. At the bottom, there's a table header with columns: 'Pat #', 'Patient', 'Sex', 'Age', 'Birth Date', 'Home Phone', and 'Patient Email'.

Pat #	Patient	Sex	Age	Birth Date	Home Phone	Patient Email
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# What stuck with you?

- ❑ We learned how to use the Vaccination Recall to send out reminders based off of OP's internal VacLogic
- ❑ We can recall a patient that is Due now or in the future, Behind schedule, or a combination of Behind & Due for vaccines
- ❑ We can recall patients by ALL vaccines, or by a specific vaccination
- ❑ Always set your Recall Date at least a few weeks in the future.



# Takeaway Action Plan

- ❑ Create Recall lists for patients:
  - ❑ Behind/Due for structured vaccinations
  - ❑ Behind/Due for voluntary vaccinations



## **Activity 5: Sending Patient Messages using the Patient Message Exchange**



# Scenario

**I just finished a Care Plan Recall and now I'm going to send out my recall messages using the Patient Message Exchange (PMX)**

Let's take a look at how the PMX works to separate and send out messages based on contact preferences...

Path to PMX: Practice Management > Patient Message Exchange

**\*\*This activity accesses Patient Message Exchange. Only an Administrator or staff member with permission: **Message\_Distribution\_Create** and **Message\_Distribution\_View** can access PMX and create or send messages**



# Let's Get Started!

**We have a list of patients we generated to be recalled for Well Visits. Let's send out those messages!**

# What Stuck With you?

- ❑ After generating a recall list we can easily send it out by using the Patient Message Exchange
  - ❑ Messages are generated based on Family Contact or system defaulted Contact Preferences
  - ❑ The PMX can make phone calls, send texts, or emails
  - ❑ The messages within the PMX are customizable
  - ❑ We can track messages that have been sent using the PMX



# Takeaway Action Plan

- ❑ Review the Patient Message Exchange configurations for:
  - ❑ Recall Messages
    - ❑ What does our phone message look like?
    - ❑ What does the text message say?
    - ❑ What is in the email message?
- ❑ Set Default Contact Preferences to ensure contacts that have no preferences set are not skipped when sending recalls

# Resources

## OP Help Center Page Links

- [Pediatric Practice Survival Checklist for COVID-19](#)
- [Demographic Analysis & Recall: Patient Demographics](#)
- [Demographic Analysis & Recall: Clinical Recall](#)
- [Demographic Analysis & Recall: Care Plan Recall](#)
- [Demographic Analysis and Recall: Vaccine Status Recall](#)
- [Configuring the Patient Message eXchange](#)

# Resources

## OP Help Center Videos & Webinars

- [OP Core Live Group Trainings](#)
  - ❑ Here you can attend the Clinical Reports Group Training which focuses on using the DAR and performing recalls
  - ❑ The next scheduled Group Training is May 5th at 3:00 pm EST
- [Patient Message Exchange \(PMX\) Configuration Video](#)
- [Using Patient Message eXchange Video](#)
- [Video: Patient Message eXchange Webinar](#)

# Questions







## The OP Way

We are committed to providing the best **pediatric technology**, **resources**, and **community** to drive practice success and quality patient outcomes.

## *Our Mission: Improving Health Through Technology*

