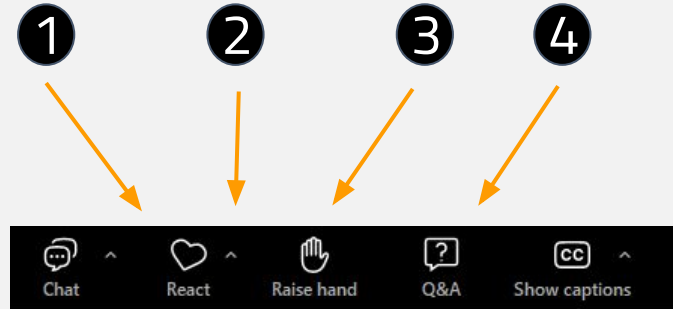# Leveraging Your Demographic Data

Navigating Zoom

All attendees will be muted during this webinar.

1. **Reactions** - Use this to react with smile, like thumbs up, or celebrate emoji.
2. **Raise Hand** - Attendees can raise hand to alert trainer you have a question. Please add your question to the Q&A tab.
3. **Q&A** - Send questions throughout the webinar to organizer and panelists
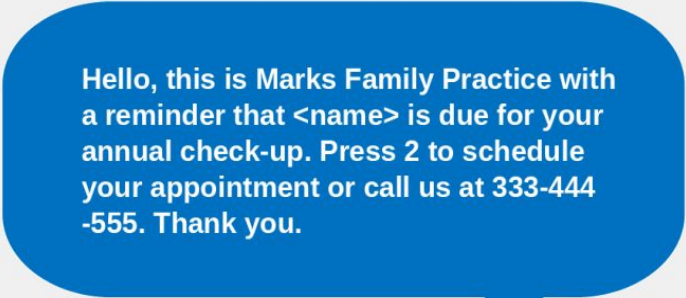4. **Resources** - Are available to download during the session
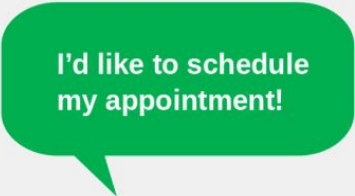
Objectives

- Familiarize yourself with the different reporting options available in OP
- Learn how to use the right tool for the job
- Perform Recalls to drive Practice Revenue
- Save Reports!

Using the DAR for Recalls

- Well visits
- Birthday Lists
- Vaccines
- Prescriptions
- Numeric labs
- Vaccines Given

Hello, this is Marks Family Practice with a reminder that <name> is due for your annual check-up. Press 2 to schedule your appointment or call us at 333-444-555. Thank you.
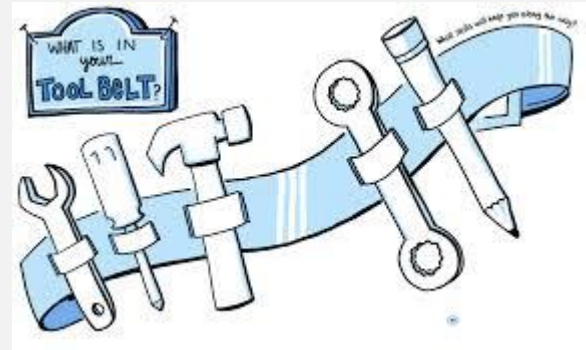
I'd like to schedule my appointment!

Using the DAR for Recalls

- Create Patient Demographic List (PDL)
  This must be done before running any recall
- Once the PDL has been created you can then filter or group the result to further narrow your field
  - Some filters commonly used:
    - Age
    - PCP
    - VFC Status
    - Zip Code

You can use the Demographic Analysis Recall Report to pull multiple types of reports:

Different Reports you can pull and filter:

- Birthday list
- Patient Status: Collections, Transferred, Wait List
- Patients seen based on Insurance
- Patients based on demographic location by zip code

1. Reports--> Demographic Analysis and Recall

2. Create Demographic List

- No Date Restriction
- Use a Date Restriction to pull patients seen by a specific date
- Active patients only

Scenario: How many active patients are 5 years old?

1. Practice Management--> Demographic Analysis and Recall

2. Create Demographic List

- No Date Restriction
- Active patients only

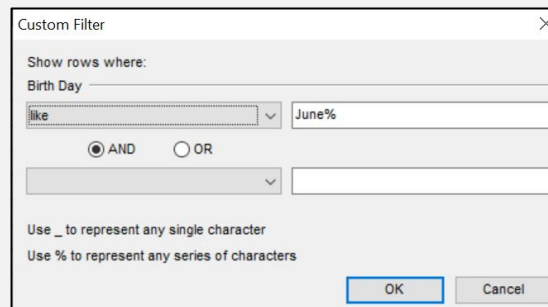3. Search

4. Age column: Check off 5

Scenario: How many active patients have a Birthday in a specific month?

1. Practice Management--> Demographic Analysis and Recall

2. Create Demographic List

- No Date Restriction
- Active patients only

3. Search

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

4. Birth Day column: Click on the filter icon <u>like</u> should be selected and now we will type in the Birth month with %June%, click OK.

5. You will now see a list of patients that have birthdays in June

Let's Try It!

Practice Scenarios

I want to recall all of my active patients that are due for a Well Visit

1.Practice Management tab> Demographic Analysis and Recall

2.Create PDL List and narrow down to desired patient pool

3. Care Plan Recall > Preventative Exam

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

- Create your Patient Demographic list
    - Select Active Patients
    - One visit in last 3 years (We use this date because anything past 3 years when they return to the office it would be considered a new patient visit)
    - Search
  - Clinical Recall Tab
    - Select Asthma Diagnoses
  - Search
  - Find or add the "Last Visit Date" to the grid
    - Hover and click the funnel icon to bring up filter options
    - Click Custom
    - Set the operator to Less than or equal to and enter a date 6 months previous

Scenario: How many of the my patients are due for a flu shot?

1. Vaccine Status Recall

2. Forecast Status: Behind or Due

3. Vaccine Group: Flu- Seasonal

4. Search

Create Patient Recalls

- Recalls can be made using the Patient Message Exchange (PMX)
- PMX can send out reminders using:
  - Phone calls
  - Emails
  - Text Messages
- If you aren't using the PMX you can still
  - Export the list to a spreadsheet
  - Print letters to send as reminders

What have we learned?

- When creating a PDL you can slice and dice to get down to the exact patient population you need to recall
- Once you have the patient pool you want, recalling them for a well check, vaccine, or lab result is at the tip of your fingers
- You can use a variety of methods to complete the process and reach your patients, raising practice revenue and patient care simultaneously
- You can save a report!

Questions

Action Items

- See how many of your active patients that you've seen in the last 3 years is overdue for a well check

- See how many of that same group are overdue for vaccinations

- Get those reminders out, and get those kiddos in!

Learning Resources

- elearning
  - Clinical and Recall Reporting Videos
    - [Run Patient Demographic List (1 video)](#)
    - Run Clinical Recall (4 videos)
    - [Run Care Plan Recall (1 video)](#)
    - [Run Vaccine Status Recall (1 video)](#)
    - [Run Lab Report Recall (1video)](#)
    - [Run Vaccine Given Report (1 video)](#)
    - [Send Messages for Recall (1 video)](#)

- OP Help Center
  - (F1 or Help > Help Topics from the main menu bar in OP)
  - https://op.knowledgeowl.com/help/patient-message-exchange
  - https://op.knowledgeowl.com/help/demographic-analysis-and-recall

Thank YOU!!

Thank you for attending today's webinar.

We hope you found it helpful and would appreciate hearing any feedback you have to improve these webinars.

We are always looking for bigger and better ways to better serve you, our customer.

If you have something you would like to see in a future Group Training session, please let us know!