

Electronic Health Record (EHR) instructions to create a patient list to find patients with potential underlying axial spondyloarthritis (axSpA) in the **Cerner® EHR system**



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1. Background, Instructions, and Limitations*

These instructions are created specifically to create a Patient List in the Cerner EHR system and will not work for other conditions, treatments, therapeutic areas, or on other EHR systems.

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The suggested criteria are listed below. Not all criteria may be routinely documented in the EHR and depending on the level of integration of the practice or health system, some criteria may be unavailable. For example, the CPT code for the HLAB27 test indicates the test was ordered but a positive test result of the HLAB27 test may not be available in the EHR as a structured result. Given this practice variation in documentation and coding, the list of criteria may be modified. A manual chart review of the resulting patient list is recommended.

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*These data sets were created in conjunction with Precision Value & Health.

Potential inclusion criteria are: (note that these criteria are variable and the end user may choose which criteria to include and exclude in the patient list based on their clinical judgment)

- **Age: less than or equal to 45 years old**

- **Diagnosis:**

- Back pain (longer than 3 months)	M54.5
- Dorsalgia (back pain NOS)	M54.9
- Sciatica, Unspecified Side	M54.30
- Sciatica, Right Side	M54.31
- Sciatica, Left Side	M54.32
- Pain in Left Hip	M25.551
- Pain in Right Hip	M25.552
- Pain in Unspecified Hip	M25.559
- Pain in Right Shoulder	M25.511
- Pain in Left Shoulder	M25.512
- Pain in Unspecified Shoulder	M25.519
- Pain in Right Elbow	M25.521
- Pain in Left Elbow	M25.522
- Pain in Unspecified Elbow	M25.529
- Pain in Right Wrist	M25.531
- Pain in Left Wrist	M25.532
- Pain in Unspecified Wrist	M25.539
- Pain in Unspecified Thigh (Buttock Pain)	M79.659
- Pain in Right Knee	M25.561
- Pain in Left Knee	M25.562
- Pain in Unspecified Knee	M25.569
- Primary Iridocyclitis (uveitis), Right Eye	H20.011
- Primary Iridocyclitis (uveitis), Left Eye	H20.012
- Primary Iridocyclitis (uveitis), Bilateral	H20.013
- Recurrent Acute Iridocyclitis (uveitis), Right Eye	H20.021

- Recurrent Acute Iridocyclitis (uveitis), Left Eye	H20.022
- Recurrent Acute Iridocyclitis (uveitis), Bilateral	H20.023
- Chronic Iridocyclitis (uveitis), Right Eye	H20.11
- Chronic Iridocyclitis (uveitis), Left Eye	H20.12
- Chronic Iridocyclitis (uveitis), Bilateral	H20.13
- Psoriasis	L40.0
- Long Term Current Use of NSAIDs	Z79.1

• **Medications**

- Current Use of NSAIDs – 3 months

• **CPT codes:**

- CRP	86140
- HLAB27 - positive result	86812
- In the previous 24 months:	
◦ Lumbar Spine Imaging MRI with or without contrast	72158
◦ Lumbar Spine Imaging MRI without contrast	72148
◦ Lumbar Spine Imaging CT with contrast	72132
◦ Lumbar Spine Imaging CT without contrast	72131
◦ Lumbar Spine Imaging Xray ≤4 views	72100
◦ Lumbar Spine Imaging Xray 4 views	72110
◦ Lumbar Spine Imaging Xray 6 views	72114
◦ Pelvis Imaging MRI with contrast	72196
◦ Pelvis Imaging MRI no contrast	72195
◦ Pelvis Imaging MRI with or without contrast	72197
◦ SI Joints Imaging MRI with contrast	72196
◦ SI Joints Imaging MRI without contrast	72195

• **Lab Results:**

- CRP result higher than 1 mg/dL OR 10 mg/L

• **Encounter with an Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation**

2. Cerner

Cerner's Discern Analytics is a reporting tool capable of creating patient queries. Consult your organization if additional user rights are required to access this functionality.

1. Launch Discern Analytics 2.0. It may be found as "DA2.exe" in the Cerner applications folder.
2. Click the Domains tab to access available domains.
3. Select "File" > "New" > "Query" or select the desired domain by double-clicking it.
4. The Query Wizard will display available categories.
5. In the Qualifications window, select the Person > Demographics > Age Filter and click "Modify Filter List."
6. Set the Age range to less than or equal to 45 years old. Click "Include."
7. In the Qualifications window, select the Diagnosis Code Filter and click "Modify Filter List."
8. Enter all other ICD-10 codes listed in the inclusion criteria table in the search box and select all ICD-10 codes. Click "Include."
9. In the Qualifications window, select the Clinical Events Results Filter.
10. Enter and select "CRP" from the available list of qualifications.
11. Set the range to CRP values higher than 1 mg/dL OR 10 mg/L. Click "Include" (Note: a look-back range of 24 months may be set to look at imaging studies in the last 2 years).
12. In the Qualifications window, select the Encounters > Procedure Codes filter and click "Modify Filter List."

- 13.** Enter and select all CPT codes listed in the inclusion criteria. Click "Include."
- 14.** In the Qualifications window, select the Orders > Orders Synonym ID Filter and click "Modify Filter List."
- 15.** Select the NSAIDs medications class. Click "Include" (Note: a look-back range of 3 months may be set to look at long-term NSAIDs use).
- 16.** In the Qualifications window, select "Encounter" filter and click "Modify Filter List."
- 17.** Select the Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation department (or select Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation for Role). Click "Include."
- 18.** Select all the desired columns to include in the report by clicking the right arrow or dragging the selected folders to the Columns window.
- 19.** Consider a column that uses the Date and Date/Time qualifications to set the look-back period.
- 20.** Set the general criteria for the report and enter a unique name (for example, "axSpA").
- 21.** Click "Query" > "Query Review" or "Run Query in Viewer" in the Query tab to run the query.
- 22.** The results will display. The results may be further manipulated if desired or exported to Excel. For the Back Pain criteria, set a filter to find only patients with a diagnosis of back pain longer than 3 months.
- 23.** Save the query.

3. Notes

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Electronic Health Record (EHR) instructions to create a patient list to find patients with potential underlying axial spondyloarthritis (axSpA) in the **eClinicalWorks® EHR system**



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1. Background, Instructions, and Limitations*

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The suggested criteria are listed below. Not all criteria may be routinely documented in the EHR and depending on the level of integration of the practice or health system, some criteria may be unavailable. For example, the CPT code for the HLAB27 test indicates the test was ordered but a positive test result of the HLAB27 test may not be available in the EHR as a structured result. Given this practice variation in documentation and coding, the list of criteria may be modified. A manual chart review of the resulting patient list is recommended.

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Potential inclusion criteria are: (note that these criteria are variable and the end user may choose which criteria to include and exclude in the patient list based on their clinical judgment)

- **Age: less than or equal to 45 years old**

- **Diagnosis:**

- Back pain (longer than 3 months)	M54.5
- Dorsalgia (back pain NOS)	M54.9
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- Psoriasis	L40.0
- Long Term Current Use of NSAIDs	Z79.1

• **Medications**

- Current Use of NSAIDs – 3 months

• **CPT codes:**

- CRP	86140
- HLAB27 - positive result	86812
- In the previous 24 months:	
◦ Lumbar Spine Imaging MRI with or without contrast	72158
◦ Lumbar Spine Imaging MRI without contrast	72148
◦ Lumbar Spine Imaging CT with contrast	72132
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• **Lab Results:**

- CRP result higher than 1 mg/dL OR 10 mg/L

• **Encounter with an Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation**

2. eClinicalWorks

eClinicalWorks' Registry allows end users to create a Patient List.

1. Select "Registry" from the left navigation panel and click "Registry" from the available options to launch the report engine.
2. The Registry function can be used in a modular approach. Select the filter tab on top of the Registry screen to select the desired filter and narrow down or expand the search based on the number of resulting patients.

When initially launching the query, click "Run New." Additional criteria can be added, and clicking Run Subset on any subsequent criteria will narrow the query results.

- a. Select the Demographics tab.
 - i. Set the desired age range to less than or equal to 45 years old.
 - ii. Click the Run New button.
- b. Select the ICD tab.
 - i. Set the filter in the top left corner to ICD Codes.
 - ii. Click on the ellipsis (...) icon to open the Select Assessment Wizard.
 - iii. Enter "M54.5" in the Smart Search field.
 - iv. Click "M54.5" to forward the code to the Selected Assessments window.
 - v. Repeat steps i. through iv. for all other ICD-10 codes listed in the inclusion criteria table.
 - vi. Click the Run Subset button.
- c. Select the Labs/DI/Procedures tab.
 - i. Select "Labs" and enter "CRP" in the search field. Uncheck the yellow star icon to search all labs. Set the desired Result Range to CRP values higher than 1 mg/dL OR 10 mg/L (Note: CRP results may not be

documented as a structured field in the Labs section of the EHR. Alternatively, consider the CPT filter [see below] if no structured labs are available for the CRP results. The results may be documented in a progress note or other unstructured field and revealed with a chart review.)

ii. Click the Run Subset button.

d. Select the CPT tab.

i. Enter all CPT codes listed in the inclusion criteria and click the Run Subset button (Note: A look-back range of 24 months may be set to review imaging studies from the last 2 years.)

e. Select the Rx tab.

i. Click the arrow next to Drug Names and change it to Drug Class. Enter NSAIDs (depending on the medication compendia used, consider entering nonsteroidal anti-inflammatory agents). Check the radio button next to Current Medication as of Today and a look-back range can be set to indicate greater than 3 months' use.

f. Select the Encounters tab.

i. Select "Ophthalmologist" visit in the Visit Type field. Add it to the criteria and repeat the same step to add Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/ Rehabilitation visits. Click the Run Subset button.

g. Patients meeting the criteria will display. The patient list may be further refined by clicking the Analyze Data button. For the Back Pain criteria, set a filter to find only patients with a diagnosis of back pain longer than 3 months.

3. The results may be exported to Excel by clicking "Copy" and selecting "CSV".

4. To save the query for future use, click the Save Queries button and save with a unique name (for example, "axSpA").

3. Notes

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Electronic Health Record (EHR) instructions to create a patient list to find patients with potential underlying axial spondyloarthritis (axSpA) in the **Epic® EHR system**



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1. Background, Instructions, and Limitations*

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- **Age: less than or equal to 45 years old**

- **Diagnosis:**

- Back pain (longer than 3 months)	M54.5
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- Chronic Iridocyclitis (uveitis), Bilateral	H20.13
- Psoriasis	L40.0
- Long Term Current Use of NSAIDs	Z79.1

• **Medications**

- Current Use of NSAIDs – 3 months

• **CPT codes:**

- CRP	86140
- HLAB27 - positive result	86812
- In the previous 24 months:	
◦ Lumbar Spine Imaging MRI with or without contrast	72158
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• **Lab Results:**

- CRP result higher than 1 mg/dL OR 10 mg/L

• **Encounter with an Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation**

2. Epic

One of Epic's reporting solutions, Reporting Workbench or SlicerDicer, may be used to create the patient list. Consult your organization if administrative user rights are required to access the reporting solutions.

Health systems may use groupers for reporting purposes. For this report, a diagnosis, procedures, and medications grouper may be considered. If no such groupers are available, consider creating the grouper records. The grouper records may be used in both reporting solutions.

Step 1 – Create Grouper Records – Optional (only needs to be completed if no diagnosis, medication, or procedures grouper records are available)

To create a Diagnosis Grouper record for the diagnoses in the inclusion criteria list:

1. Access the Grouper Record Editor in Tools > Management Console.
2. Select the Diagnosis master file and select the ICD-10 code set.
3. Add all ICD codes from the inclusion criteria list to the diagnosis grouper and click "Save."

To create a Procedures Grouper record for the procedures in the inclusion criteria list:

1. Access the Grouper Record Editor in Tools > Management Console.
2. Select the Procedures master file and select the CPT code set.
3. Add all CPT codes from the inclusion criteria list to the procedures grouper and click "Save."

To create a Medication Grouper with NSAIDs:

1. Access the Grouper Record Editor in Tools > Management Console.
2. Select the Medications master file.
3. Add all desired NSAIDs medications or NSAIDs pharmaceutical class to the medication grouper and click "Save."

Step 2 – Create the patient list

Option 1 – Reporting Workbench:

1. Access Reporting Workbench (click the Epic logo > Reports > My Reports).
2. Navigate to the Library tab from the Reports menu.
3. Enter "generic criteria" or "find patients" in the search field and click "Search."
4. Select the Find My Patients – Generic Criteria report and click "New."
5. The Report Settings field will display. Click the Criteria tab in the toolbar.
6. Click "Add" and select a criterion. Enter "age" in the search field (Filter Criteria). Click "Finish."
7. Set the age range to less than or equal to 45 years old.
8. Click "Add" and select a criterion. Enter "diagnosis" in the search field (Filter Criteria). Click "Finish."
9. Select "Diagnosis" by Grouper in the search field.
10. Enter the Diagnosis Grouper created in Step 1.
11. Click "Add" and select a criterion. Enter "last result value" in the search field.
12. Select "Last Result Value" criteria. Enter "CRP" in the Value field. (Depending on how the lab catalog was created, the description of the lab result may vary).

- 13.** Set the desired range to CRP values higher than 1 mg/dL OR 10 mg/L.
- 14.** Click "Add" and select a criterion. Enter "procedures" in the search field (Filter Criteria). Click "Finish."
- 15.** Select "Procedures by Grouper" and enter the procedures grouper created in step 1.
- 16.** Click "Add" and select a criterion. Enter "medication by grouper" in the search field (Filter Criteria). Click "Finish" (Note: a look-back range of 24 months may be set to look at imaging studies in the last 2 years).
- 17.** Enter the NSAIDs medication grouper created in step 1 and set the include.
- 18.** Click "Add" and select a criterion. Enter "encounters" in the search field (Filter Criteria). Click "Finish."
- 19.** Set the encounters to "Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation." Depending on how the encounters file was set up, results may vary.
- 20.** In the General tab, enter the desired Report Name (for example, "axSpA") and a Description.
- 21.** Click "Save and Run" to create the patient list. The list will display all patients matching the criteria. For the Back Pain criteria, set a filter to find only patients with a diagnosis of back pain longer than 3 months.

Option 2 – SlicerDicer:

1. Access SlicerDicer (click the Epic logo > Reports > SlicerDicer).
2. Click “New” to start a new query.
3. Click the drop-down arrow next to All Patients and select “My Patients” from the list.
4. Click + Add Criteria. A new window will display.
5. Click the Age folder (depending on the system, this may be a unique folder or stored in the Demographics folder).
6. Set the age range to less than or equal to 45 years old.
7. Click + Add Criteria. A new window will display.
8. Select the All tab on the bottom of the SlicerDicer window to display all filters.
9. Click the Diagnosis folder.
10. Select the Diagnosis by Grouper filter from the available options.
11. Enter the Diagnosis Grouper created in Step 1 in the search field and select it as a filter.
12. Click + Add Criteria. A new window will display.
13. Select the All tab on the bottom of the SlicerDicer window to display all filters.
14. Click the Lab Components folder.
15. Click in the Lab Component field and enter “CRP.”
16. Set the desired range to CRP values higher than 1 mg/dL OR 10 mg/L.
17. Click + Add Criteria. A new window will display.
18. Select the All tab on the bottom of the SlicerDicer window to display all filters.

19. Click the Procedures folder.
20. Select the Procedures by Grouper filter and enter the procedures grouper created in step 1 (Note: a look-back range of 24 months may be set to look at imaging studies in the last 2 years).
21. Click + Add Criteria. A new window will display.
22. Select the All tab on the bottom of the SlicerDicer window to display all filters.
23. Click the Medications folder.
24. Select the Medications by Grouper criteria and enter the NSAIDs medication groupers created in step 1, and set the include in the search field.
25. Click + Add Criteria. A new window will display.
26. Select the All tab on the bottom of the SlicerDicer window to display all filters.
27. Click the Encounters folder.
28. Select the Encounters criteria and add Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation to include in the search field.
29. Click "Save As" to save the query (for example, "axSpA") and refine the query results.
30. Export the new report to Reporting Workbench.
31. In the General tab, enter the desired Report Name and a Description.
32. Click "Save and Run" to create the patient list. The list will display all patients matching the criteria. For the Back Pain criteria, set a filter to find only patients with a diagnosis of back pain longer than 3 months.

3. Notes

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1. Background, Instructions, and Limitations*

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- **Age: less than or equal to 45 years old**

- **Diagnosis:**

- Back pain (longer than 3 months)	M54.5
- Dorsalgia (back pain NOS)	M54.9
- Sciatica, Unspecified Side	M54.30
- Sciatica, Right Side	M54.31
- Sciatica, Left Side	M54.32
- Pain in Left Hip	M25.551
- Pain in Right Hip	M25.552
- Pain in Unspecified Hip	M25.559
- Pain in Right Shoulder	M25.511
- Pain in Left Shoulder	M25.512
- Pain in Unspecified Shoulder	M25.519
- Pain in Right Elbow	M25.521
- Pain in Left Elbow	M25.522
- Pain in Unspecified Elbow	M25.529
- Pain in Right Wrist	M25.531
- Pain in Left Wrist	M25.532
- Pain in Unspecified Wrist	M25.539
- Pain in Unspecified Thigh (Buttock Pain)	M79.659
- Pain in Right Knee	M25.561
- Pain in Left Knee	M25.562
- Pain in Unspecified Knee	M25.569
- Primary Iridocyclitis (uveitis), Right Eye	H20.011
- Primary Iridocyclitis (uveitis), Left Eye	H20.012
- Primary Iridocyclitis (uveitis), Bilateral	H20.013
- Recurrent Acute Iridocyclitis (uveitis), Right Eye	H20.021

- Recurrent Acute Iridocyclitis (uveitis), Left Eye	H20.022
- Recurrent Acute Iridocyclitis (uveitis), Bilateral	H20.023
- Chronic Iridocyclitis (uveitis), Right Eye	H20.11
- Chronic Iridocyclitis (uveitis), Left Eye	H20.12
- Chronic Iridocyclitis (uveitis), Bilateral	H20.13
- Psoriasis	L40.0
- Long Term Current Use of NSAIDs	Z79.1

• **Medications**

- Current Use of NSAIDs – 3 months

• **CPT codes:**

- CRP	86140
- HLAB27 - positive result	86812
- In the previous 24 months:	
◦ Lumbar Spine Imaging MRI with or without contrast	72158
◦ Lumbar Spine Imaging MRI without contrast	72148
◦ Lumbar Spine Imaging CT with contrast	72132
◦ Lumbar Spine Imaging CT without contrast	72131
◦ Lumbar Spine Imaging Xray ≤4 views	72100
◦ Lumbar Spine Imaging Xray 4 views	72110
◦ Lumbar Spine Imaging Xray 6 views	72114
◦ Pelvis Imaging MRI with contrast	72196
◦ Pelvis Imaging MRI no contrast	72195
◦ Pelvis Imaging MRI with or without contrast	72197
◦ SI Joints Imaging MRI with contrast	72196
◦ SI Joints Imaging MRI without contrast	72195

• **Lab Results:**

- CRP result higher than 1 mg/dL OR 10 mg/L

• **Encounter with an Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation**

2. NextGen

NextGen offers different options to create the patient report. An executable file can be run in the customer's EHR to create the results (a Crystal Report) using the attached file or, alternatively, users can run the report using the Reporting tool. Please note that manually running a complicated patient list can be time-consuming and the configuration data may require advanced knowledge of the data element. Both options are listed below:

Option 1: Run the attached report file

1. Move the Crystal Report file to the Custom Report folder.
 - a. The folder location can be found in NG System Admin under Universal Preferences > Reports > Custom Report Path.
 - b. The typical folder location is: \nextgenroot\Prod\EMR\Reports\Custom.
2. Configure the report for use in the EHR.
 - a. In the EHR, navigate to File > Reports > Crystal Reports.
 - b. On the Report Dialog window, click "Report Setup." Set the fields as follows:
 - i. Report file: Select the report file just added to the folder.
 - ii. Report Type: Select "All Encounters for All Patients."
 - iii. Location: Leave blank. Specifying a location may break the report.
 - iv. Printer: Any selection is fine.
 - v. Description: Add any descriptive name that you like.
 - vi. Filter: Leave blank. Specifying a filter may break the report.
 - vii. Click "Add," and then "Exit."

3. To run the report, on the Report Dialog window:
 - a. Expand the All Encounters for All Patients group.
 - b. Select the report added in step 2 above.
 - c. Click "Preview."
 - d. The report will open:
 - i. The report will prompt for the practice ID. The practice ID for most single practice enterprises will be "0001." Enter all 4 characters.
 - ii. Click "OK" to run the report.

Option 2: Use the Reporting tool from NextGen

1. Click on the File menu and select "Reports".
2. Click on Generate Report and select the desired setting (Enterprise/Practice).
3. The NextGen Report Filter window will open.
 - a. Start by saving the report by clicking the Save button.
 - b. Enter a unique report name, and specify the report type.
 - c. Select at least yourself to be able to Run, Modify, and Save the report.
 - d. Note that as you build the report using the steps below, do not click the OK button, as that will run the report in its current state, without saving the report settings.
 - e. As you are building the report, click the Save button frequently.
4. On the NextGen Report Filter window, the Settings List displays all available filters.
5. Select the Patient filter.
 - a. Set the age range to less than or equal to 45.

- 6.** Select the Diagnosis filter. There are two tabs in this filter. Start on the Diagnosis Search tab.
 - a.** Click the ellipsis.
 - b.** Select the radio button next to ICD Code and search for code M54.5 using the field to the right of the 2 radio buttons.
 - c.** In the Provider Data pane, select "M54.5" and click the right arrow to move the DX to the Description pane. Click "OK."
 - d.** Back in the Diagnosis Search window, select the Who Have Ever Had checkbox.
 - e.** Select "After" in the field below the checkbox.
 - f.** In the Year field, select 2 to search for DXs going back 2 years.
 - g.** Click "Add."
 - h.** Repeat steps 5a – 5g for all other ICD-10 codes from the inclusion criteria list.

- 7.** Select the Orders filter.
 - a.** Select "Laboratory" in the Select "Order Type" field.
 - b.** In the Select Test section, click the ellipsis to open the Test Search window.
 - i.** If you order lab tests via the NextGen Compendium, select the NextGen Test Definition radio button. Alternatively, if you order tests from a lab company compendium, select the Test Definition radio button.
 - ii.** In the Description field, enter at least the first part of the test name, such as "c-rea." Click "Search."
 - iii.** Use the right arrow to move any tests identified from the left pane to the right pane. Click "OK" when complete.

- c.** Back on the Orders Filter, in “Include Patients,” select the Who Have Ever Had checkbox. Below that, select “After” and then specify 2 years.
- d.** Check the Show Test Results checkbox.
- e.** Check the Numeric Comparison checkbox.
- f.** Check the Latest Value Only checkbox.
- g.** In the Result Description field, select “C-Reactive Protein” or any other description that your CRP results display as in the Orders Module.
 - i.** To the right of the Result Description field, select “Greater.”
 - ii.** In the Value field, enter “1.0.” This assumes that your lab returns CRP results in mg/dL. If, instead, your lab returns values in the units of mg/L, enter “10.0” in the Value field.
- 8.** Select the Procedure filter. There are two tabs in this filter. Start on the Procedure Search tab.
 - a.** Click the ellipsis to open the Procedure Search window.
 - b.** Enter the CPT code for which to search and click “Search.”
 - c.** Move the found CPT to the Description pane by selecting the code in the Provider Data pane and clicking the right arrow.
 - d.** Repeat steps 8b – 8c for any other CPTs to include. Click “OK” when done.
 - e.** Back in the Procedure Search window:
 - i.** Select the Include radio button.
 - ii.** Select the Who Have Ever Had checkbox.
 - iii.** Select “After” in the field below the checkbox.
 - iv.** Select 2 in the Year field.

- 9.** Select the Medication filter. There are two tabs in this filter. Start on the Medication Search tab.
 - a.** Click the ellipsis to open the Medication Search window.
 - b.** Select the Name radio button and enter the medication name and click "Search."
 - c.** Use the right arrow button to move any desired medications to the Description pane.
 - d.** Repeat this process for any additional meds. Click "OK" when done.
 - e.** Back in the Medication Search window:
 - i. Select the Include radio button.
 - ii. Select the Who Have Ever Had checkbox.
 - iii. Select "After" in the field below the checkbox.
 - iv. Select 3 in the Month field.
- 10.** Select the Provider filter and click the ellipsis.
 - a.** Click the ellipsis in the Rendering Provider field.
 - b.** Select all Ophthalmologist, Gastroenterologist, Podiatrist, Dermatologist, Rheumatologist, Orthopedist, and/or Physical Medicine/Rehabilitation providers and add to the Include window (check the radio button next to Include).
 - c.** Set the Encounter Date field as desired.
- 11.** Select "Logical Group" filter.
 - a.** Select all search types and click the down arrow to move the items down to the Logical Group listing.
 - b.** Specify OR for each logical group.

- 12.** Select the Column filter. Here you can specify the columns to display.
- 13.** Save the report (again).
- 14.** Click "OK" to run the report.

3. Notes

- The Customer (ie, physician, medical group, IDN) shall be solely responsible for implementation, testing, and monitoring of the instructions to ensure proper orientation in their EHR system.
- Capabilities, functionality, and set-up (customization) for each individual EHR system vary. UCB shall not be responsible for revising the implementation instructions it provides to any Customer in the event that Customer modifies or changes their software, or the configuration of their EHR system, after such time as the implementation instructions have been initially provided by UCB.
- While UCB tests its implementation instructions on multiple EHR systems, the instructions are not guaranteed to work for all available EHR systems.
- The instructions have not been designed to, and are not tools and/or solutions for, meeting Advancing Care Information and/or any other quality/ accreditation requirement.
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