Creating a Patient List for Asthma and COPD Patients in Epic EHR

gsk

Patient Lists to identify asthma and COPD treatment candidates
Helping identify patients who may benefit from treatment intensification

A **Patient List,** called a **Patient List Report** in Epic EHR, is an EHR system feature that can help to identify patients who meet certain health-related criteria, including:

- New diagnosis
- Potential medication changes
- Current and Prior Medications
- A change in lab or test results
- Additional clinical or patient demographic information

Benefits of patient lists for asthma and COPD patients

A **Patient List Report** can be used to identify patients who may be candidates for treatment intensification according to clinical guidelines. A manual review of the chart for the patients listed in the report results is necessary to determine an appropriate treatment path.

Considerations:

- The query criteria should consider active patients only (not deceased or inactive as determined by the practice)

- User privileges to set up and run a Patient List Report may be limited to select users with specific security privileges

  - In large practices, privileges are reserved for local IT tech support staff, clinical managers, or system administrators

This Guide provides a high-level overview of how to create **Patient List Reports** *using Epic EHR to identify patients who may be candidates for asthma and COPD treatments. This overview is designed to provide guidance for you, your practice EHR champion, or IT staff.*

If you have further technical questions, consult your internal or external EHR support resources.

Please note that this Guide was created based upon the most current version of Epic. Features, screens, and locations may change as new software versions are released.

This Guide is meant to serve as summary information only and should not replace detailed instructions provided to you by your internal or external EHR support resources.

Source: 1. Blackwell DL, Lucas JW, Clarke TC. Summary health statistics for U.S. adults: National Health Interview Survey, 2012. CDC National Center for Health Statistics. Vital Health Stat. 2014;10(260).

How to create a Patient List Report to identify respiratory care patients in Epic

Patient List Reports can be created to identify those patients who the health care team may determine as appropriate candidates for treatment with [PRODUCT X].

The **Patient List Report** can be used as a foundation for a critical analysis of the identified patient charts to evaluate whether a patient is a candidate for [PRODUCT X]. For example, diagnosis may be included as the clinical criteria used in the search.

A manual review of the chart for the patients listed in the **Patient List Report** results is necessary to determine the recommended treatment path.

> *Note: User privileges to configure or run **Patient List Reports** may be limited to select users with specific system security privileges. Configuration of the **Patient List Report** may be managed by the health system IT Staff.*

Create a Patient List Report based on diagnosis code

Patients who are candidates for [PRODUCT X] may be identified by a diagnosis code. A health care professional should choose the criteria that are most appropriate based on their patient population and focus of the current need.

To create a Patient List Report:

- From the main Epic button navigate to **Reports** > **My Reports** > **Library**
- Search for **Diagnosis** in the search box at the top
- From the list produced, Select M**y patients with <X> Problem List Diagnosis** report

---

Matching reports

☆ **My Patients with (X) Problem List Diagnosis**
This report returns all of your patients (as defined by the patient base) that have a user entered problem list diagnosis.

[Run] [Edit] ▼

Details

- Select **Edit**

- Select **Choose Criteria**

My Patients with <X> Problem List Diagnosis [3280]

| Criteria | Display | Appearance | Summary | Print Layout | Toolbar | Override | General |

? **Search Patients**   Choose Criteria

Patient base

| And | Or |

Patient Base	
1	My Current Care Team Patients
2	

Patient living status

| And | Or | Custom |

Living Status	
1	Alive
2	

Search Criteria ✕

Select criteria to use in the search.

- ☐ BP: Last systolic
- ☐ Care team: Current member
- ☐ Care team: Current PCP
- ☐ Care team: During date range
- ☐ Care team: PCP during date range
- ☐ Chief complaint
- ☐ Chief complaint by grouper
- ☐ City
- ☐ Communication preference
- ☐ Diagnosis
- ☑ Diagnosis by Code
- ☐ Diagnosis by grouper
- ☐ Employer
- ☐ Employer State

Diagnosis by Code
Filter patients by diagnosis code.

Details
Searches all encounters containing a particular diagnosis code.

This criterion accepts multiple values to search on. You may choose logic for this criterion

Accept   Cancel

- Search for and select **Diagnosis by Code.** Select **Accept**

- In the appropriate fields, enter appropriate diagnosis code and code set

Diagnosis by Code

| Search | Or | Custom |

	Diagnosis Code	Code Set
1	J44.9	ICD-10-CM [2]
2		

- Add additional diagnosis codes as desired

- Select **Run** to obtain a **Patient List Report**