Creating Patient Lists by Underlying Condition with eClinicalWorks Registry

New Yorkers with certain underlying conditions are eligible for COVID-19 vaccination. Organizations that administer the vaccine and those that refer patients for vaccination should use their electronic health record to identify patients with underlying conditions that make them at higher risk of severe COVID-19 and proactively inform them about the vaccine.

Follow this guide to generate a list of patients with underlying conditions using the eClinicalWorks (eCW) Registry and send messages to those patients through eCW. This guide shows the steps to generating a list of patients with hypertension as an example. To see the current groups eligible in New York State for the COVID-19 vaccine click <u>here</u>.

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Running a Registry Report

Note: the screenshots in this section are from the eCW v11. Your version may look slightly different, but the steps will be the same.

1. **Open the eCW Registry**. Click on the <u>Registry</u> band on the left and then the <u>Registry</u> button.

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Practice healow	🔕 Registr	y -							
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Patient Recall	Age Range	Frc To 🗆	M Selec	t All	~	Facility 🛨	٩	✓ Race	~
	Sex	Both 🗸	PCI	' Q		Insurance -	Q Name	Q Ethnicity	~
Lookup Encount	Zip Code		Ren Provide	Q		Language		✓ Program	
	DOB (Actual)	04/01/2	4/01/202	Patient Se	arch Options	Inactive [stry Enabled	
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R									
Registry Reports	Clear Search	Copy - Releas	se Lock Ana	lyze Data	Exclude fro	m Search	- Rulk Inactivate	/Activate patients +	
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Quality Measures	P	PATIENT NAME		DOB		SEX	AGE	TEL NO	ACC #
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2. Generate list of all patients with hypertension. Click the ICD tab.

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Registry	Demographics Vitals Labs/DI/Procedur CD PT RX Chief Complaints Medical History Imm/T.inj Encou
	ICD Groups -
Patient Recall	Search Options
	Date Range 11/06/2019 To 11/06/2019

Select filters:

a. Select ICD Groups in drop down menu

b. Click Sel

c. Select ICD10 group for Hypertension and click Close. If you are creating a list of patients with another underlying condition, select the other condition here.

d. Select Date Range

e. Click the Run New button on the right side of the screen

Registry				
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Demographics Vitals Labs/DI/Procedure ICD CPT RX	Chief Complaints Medical History	Imm/T.inj Encounters Structured Data Reports Saved Reports Referrals Reports Allergies		
		b		
Search Options	th in Problem List	_		
Date Range 11/06/2019	To 11/06/2019	m d		
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	ICD Groups		⊗	Č
	ICD Groups		New Sa	ve Queries Run Subset (Not) Run Subset Run New
Clear Search Copy - Release Lock Analyze Data	Group Name	Group Description		
	Asthma	ICD9 Group incorporating all asthma ICD9 codes	/ 🕯	
PATIENT NAME	DM	ICD9 Group incorporating all the diabetes mellitus ICD9s including optical and pregnancy	/ 🕯	ACC #
	DM ICD-10	ICD-10 codes for Diabetes	/ 🕯	
	DM2	dm	/ 1	
C	HTN	ICD9 Group incorporating all primary HTN ICD9s	/ 1	
	Hyperlipidemia	ICD9 Group incorporating all hypercholeterolemia ICD9 codes	/ 🗊	
	IVD	ICD9 Group incorporating Ischemic Vascular Dz ICD9s	/ 1	
	NYC rep. dis.	ICD9 Group of all New York State Reportable Diseases	/ 🕯	
	NYS PCMH 2019	ICD10	/ 🗊	
	Prediabetes	Prediabetes	/ 🗊	
			Close	

- 3. Narrow down the list to only active patients. The list you just ran will include <u>all</u> patients with hypertension, even if they have not visited your practice in many years. Narrow down the list to patients who have visited in the past one year or two years, depending on your preference.
 - a. In the <u>Encounters</u> tab, enter a date range (start date on the left, end date on the right) to narrow the list down to patients who visited during that time.

Demographics	Vitals Lal	os/DI/Procedure	ICD CPT	RX Chief Cor	nplaints	Medical History	Imm/T.in	j Encounter
	Date Range	01/11/2020	То	01/11/2021	100	Facility	- Q	

4. **Export the list.** Export this list from eCW to Excel to print, analyze, and track outreach. Select the <u>Copy</u> dropdown menu and click <u>CSV</u>. If you are using the web version of eCW, you will see the report downloading at the bottom left corner of the browser. Click on the file to open.

Practice	Registry	•											
Registry	Demographics	Vitals	Labs/DI/Procedure	ICD CP	RX	Chief Complaints	Medical	History	Imm/T.inj	Encounters	Structured Dat	a Reports	
Patient Recall	Search (Options	Search	3,Z68.42,Z68.44,Z68 in Assessments	Search in Pr		List							
R	Note: The Registry for patients with e Demographics: Sex ICD :: 110 OR Z68.43 Z68.45 AND Search Clear Search	Both AN OR Z68.42	rs. 🕜 D Show = All OR Z68.44 OR	Analyze I	lata	Exclude from Sea	Save Que		Run Subse	t (Not)	Run Subset	Run New	G
Quality Measures	PAT	-		Panoly LC 1	- Club	DOB	ch -	SEX	AGE	TEL NO		ACC #	^
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Practice	040									_
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Registry	Demogra	phics Vitals Labs	/DI/Procedure	ICD CPT RX C	hief Complaints Me	edical History	m/T.inj	Encounters Structu	ired Data Reports	
B)	ICD Codes	· I10,Z68.43,Z68.	File File Dow	nload		3	<			
Patient Recall	Sean		Do yo	u want to open or sav	e this file?					
Lookup Encount	Date Ran	ge 05/13/2020 E	Ge 🔀		Report_161729276337 Excel Comma Separat					
Registry	for patients of Demographic	gistry will only return with encounters. () Sex = Both AND Sho	Do Tra	From: nyfpmpa	pp.eclinicalweb.com en Save	Cancel	oset	(Not) Run Sub	set Run New	
Registry Reports		68.43 OR Z68.42 OR Z earch in Assessments		While files from the Inte harm your computer. If y save this file. What's th	you do not trust the sour		/Ac	tivate patients 👻		Q
<u>2</u> 5		PAT Text	<u> </u>		000	JLA	AUL	TEL NO	ACC #	^
Quality Measures		Abc CSV								
Chronic Care R										
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Statistics Reports										

Sending a Patient Message

If your practice has a patient portal (for eMessages) or eClinicalMessenger (for Text/SMS and Voice messages), you can send one message to all the patients on the Registry list you created. Follow the steps below to send an eMessage, which is a message through the patient portal. The steps for voice or text/SMS messages are similar.

1. **Open Messenger.** After running your report, select <u>Messenger</u> at the bottom of the screen.

Cle	ar Searc	:h Copy v	Release Lock	Analyze Dat	ta Exclude from	n Search	•	Bulk Inactivate/Activ
		PATIENT NAME				DOB		
✓								
✓								
Lette	r 🔺 🛛 F	Run Letter F	lowsheet Pat	tient Hub	lew Appointment	Messer	nger	

 Select Modality. In the pop-up window, choose eMessage as your modality to send a patient portal message. Note that this will only be sent to those patients who are web-enabled. You may also select <u>Voice</u> or <u>Text/SMS</u> to reach patients through those modalities.

Send Message - (100 Patient'	s Selected)
Choose Modality eMessage Voice Text	/SMS 🗌 Voice Or Text/SMS
Choose Template Provider/ Staff Message Type All	 ✓ ✓
Template	Subject
Cholesterol	©
No. of Result 15 🗸 Pag	e 1 of 1 🔀 < 🗲 刘

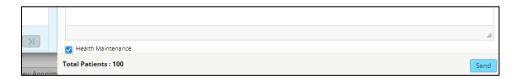
3. **Create Message.** On the right half of the Messenger screen, type the message you want to send. You will need to enter a message for each modality (eMessage/Voice/Text). If you are sending more than one kind of message, type out or copy and paste the same message in each of the tabs.

(933)	Treasure and	
eMessage	Voice	Text/SM

- **a.** If sending an eMessage to the patient portal, click the <u>Patient Portal/Healow App</u> button on the eMessage tab.
- **b.** Type your message subject (for example: *COVID-19 Vaccination Outreach Information*) into the *Subject* field and type your message into the *Message* field.
- **c.** To save this message as a template to use in the future, click <u>Add</u>, name the template, and click <u>Save</u>. You will be able to use this template for future patient lists.

Send Message - (100 Patient's Selected)	ğ
Choose Modality	Preview Message eMessage
eMessage Voice Text/SMS Voice Or Text/SMS	Patient Portal / Healow App
Choose Template	Template Name
Provider/ Staff 🔾 👻 🏠	COVID-19 Vaccination
Message Type 🛛 🖌 🗸	Subject
	COVID-19 Vaccination Outreach Information
Template Subject	Message
Cholesterol	
No. of Result 15 y Page 1 or 1 ref 6 3 3	Info about COVID-19 vaccinations
No. of Result 15 Page 1 of 1 C	C
	body p
Le v App	Health Maintenance Save Cancel

4. Send the message. Once the message is ready, check <u>Health Maintenance</u> in the bottom left corner, and then press Send.



To access a saved message template in the future, check the left-hand side of the <u>eMessage</u> window.

Choose Modal	
	ice Text/SMS Voice Or Text/SMS
Choose Templ	ate
Provider/ Staff 🛛 📿	- ☆ …
Message Type 🛛	All
Template	Subject
COVID-19 Vaccination	COVID-19 Vaccination Outreach Information
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