

How to Run a Provider's "PCP Diabetes Panel" for Panel Management

Purpose: Assist support staff to run customizable report to display diabetes care gap data on a provider's panel.

1. Access "Reporting Workbench" from the dashboard:

Clinical and Care Manager Dashboard:

The screenshot shows the Clinical and Care Manager Dashboard. At the top, there are links for "Panel Management Reports", "Patients on <X> Provider's Panel", and "Patients Scheduled with <X> Provider in the Next 7 Days". Below these is a section titled "My Reports - RW" which is highlighted with a red box. Underneath, it shows "Last Refresh: 03:14:18 PM" and a table of recent results.

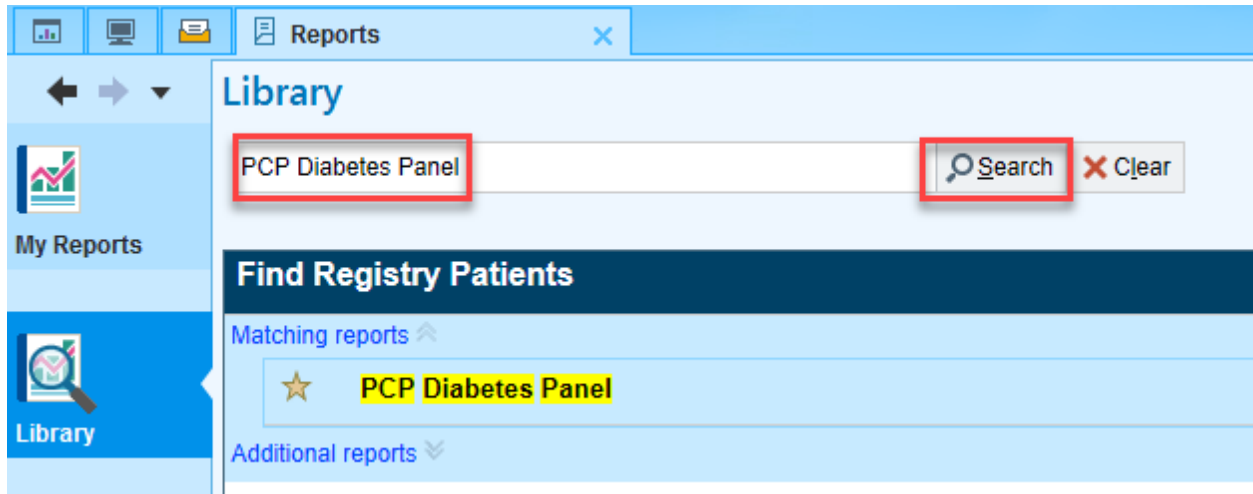
Report Name	Results	Status
▼ Recent Results		
PB Generic Transaction Search	0	Ready to view
PB Generic Transaction Search	103	Viewed

Provider Dashboard:

The screenshot shows the Provider Dashboard. At the top, there are links for "PB0415 - Provider Activity Report", "PB0416 - Provider Activity Detail Report", "E-Prescribed Controlled Med Orders General (Crystal) UW AdHoc", and "E-Prescribed Controlled Med Orders Monthly (Crystal) UW". Below these is a section titled "My Favorite Reports" which is highlighted with a red box. Underneath, it shows a table of recent results.

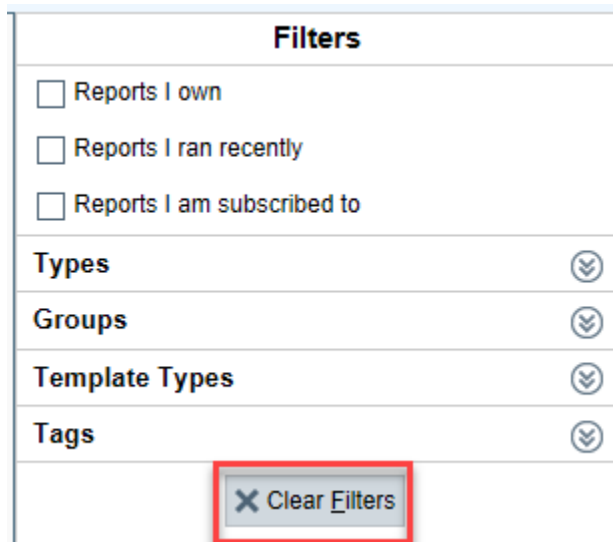
Report Name	Results	Status
▼ Recent Results		
PB Generic Transaction Search	0	Ready to view
PB Generic Transaction Search	103	Viewed
PCP Diabetes Panel	218	Viewed

2. Search for "PCP Diabetes Panel" in the Library tab

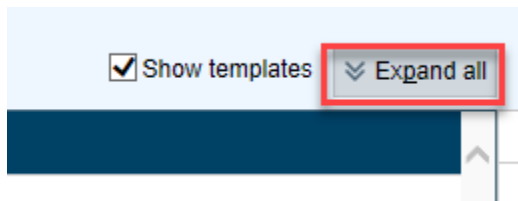


- Report isn't displaying?

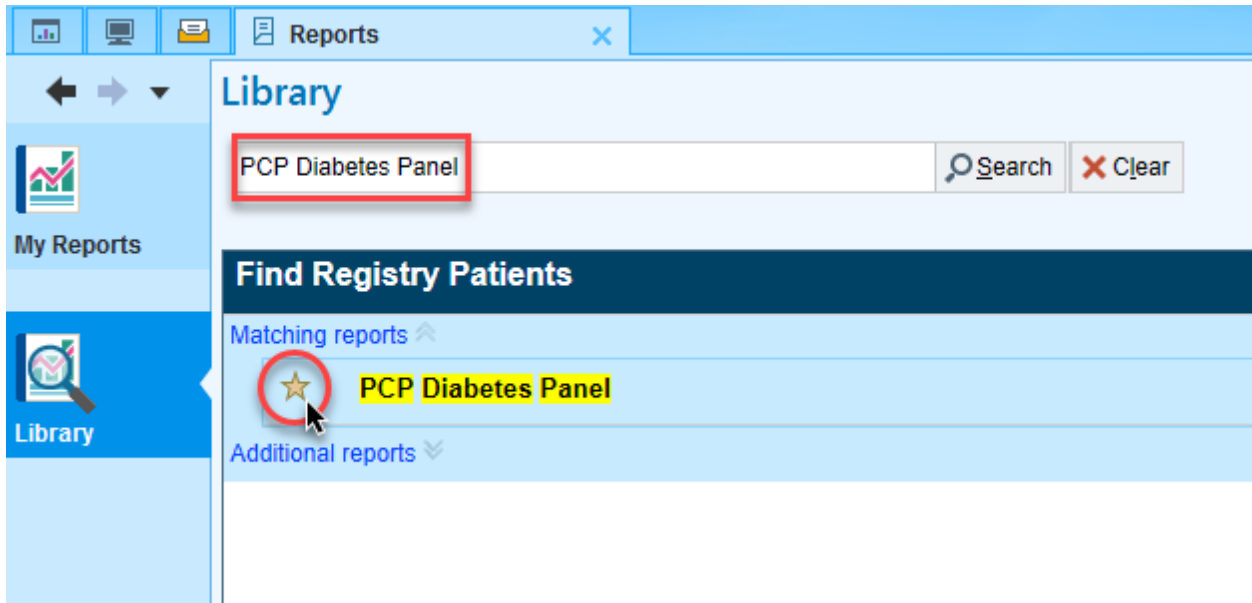
Try clearing filters:



Or selecting "Expand all"

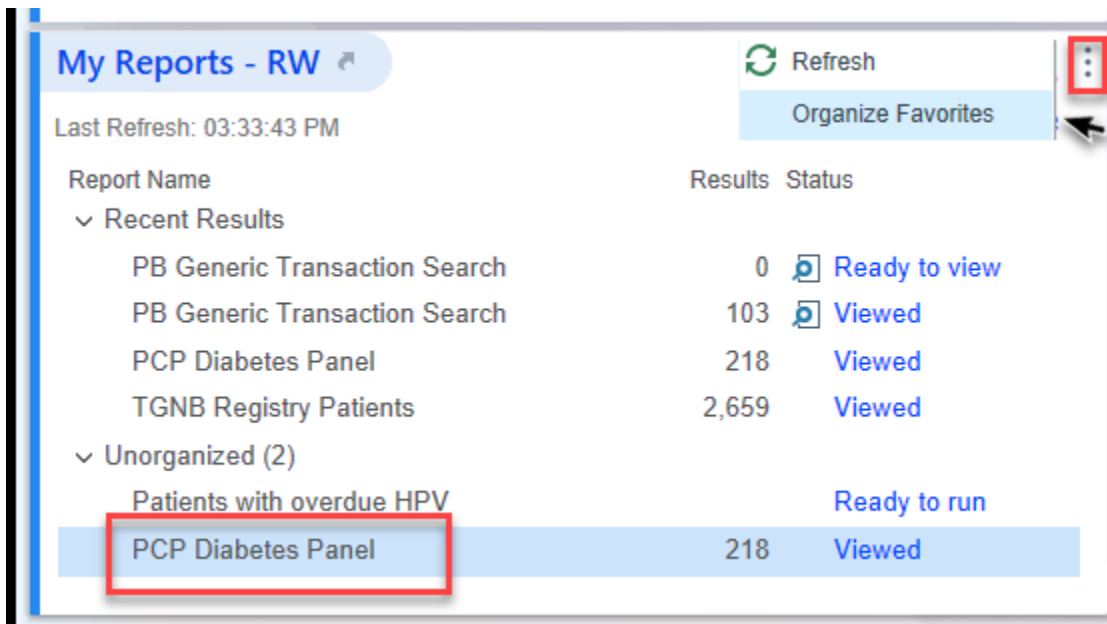


3. Select the star symbol to favorite the report so it appears on your dashboard:



Considerations:

- If you have multiple reports in your favorites, consider using the organize favorites feature to organize how they appear:



- Running this report for multiple providers or the same provider? Consider selecting “Save as” to create your own copy of the report to save your “run as user” filters.

Report Settings - PCP Diabetes Panel [10901575]

Criteria Display Appearance Summary Print Layout Toolbar Override General

Find Patients ⓘ

Find Criteria Enter a search term, or click the search icon to browse available criteria

Patient base ⓘ

PCP Current

Run as user ⓘ

	User	
1	FANG, VICTORIA BOBRYCK	🔍
2		🔍

Criterion Logic **OR**

Registry ⓘ

DIABETES REGISTRY

Patient living status ⓘ

Alive

Report Logic **AND**

Show search summary

Run Save **Save As** Restore Close