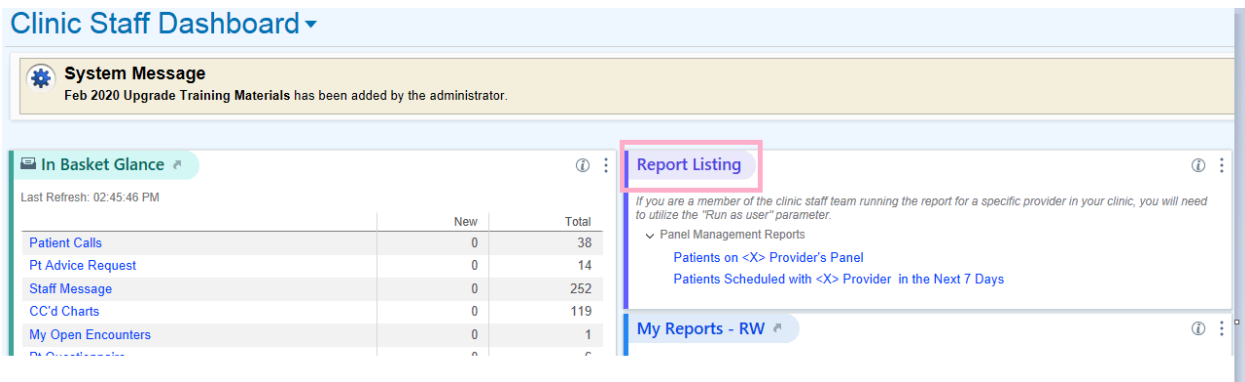


# How to Run “Patients on <X> Provider’s Panel” Report Job Aid

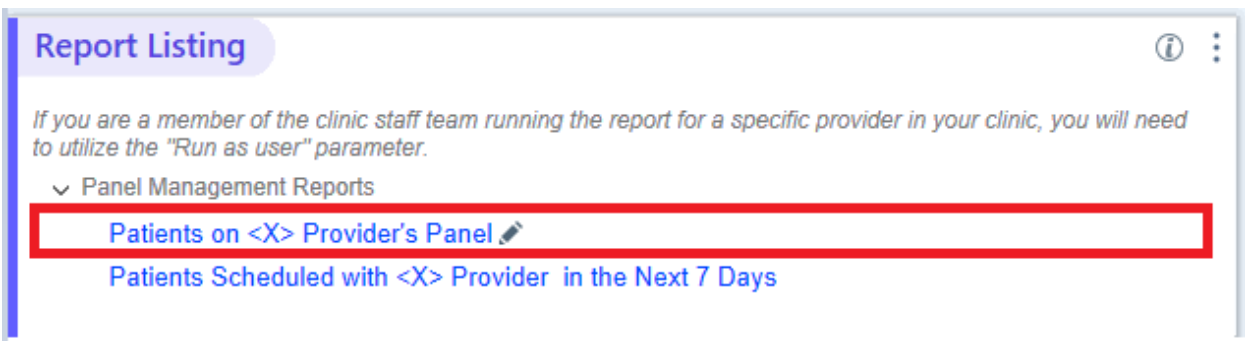
**Purpose:** Assist support staff to run customizable reports displaying data on a provider’s panel.

## 1. Begin at the Clinic Staff Dashboard: Report Listing section



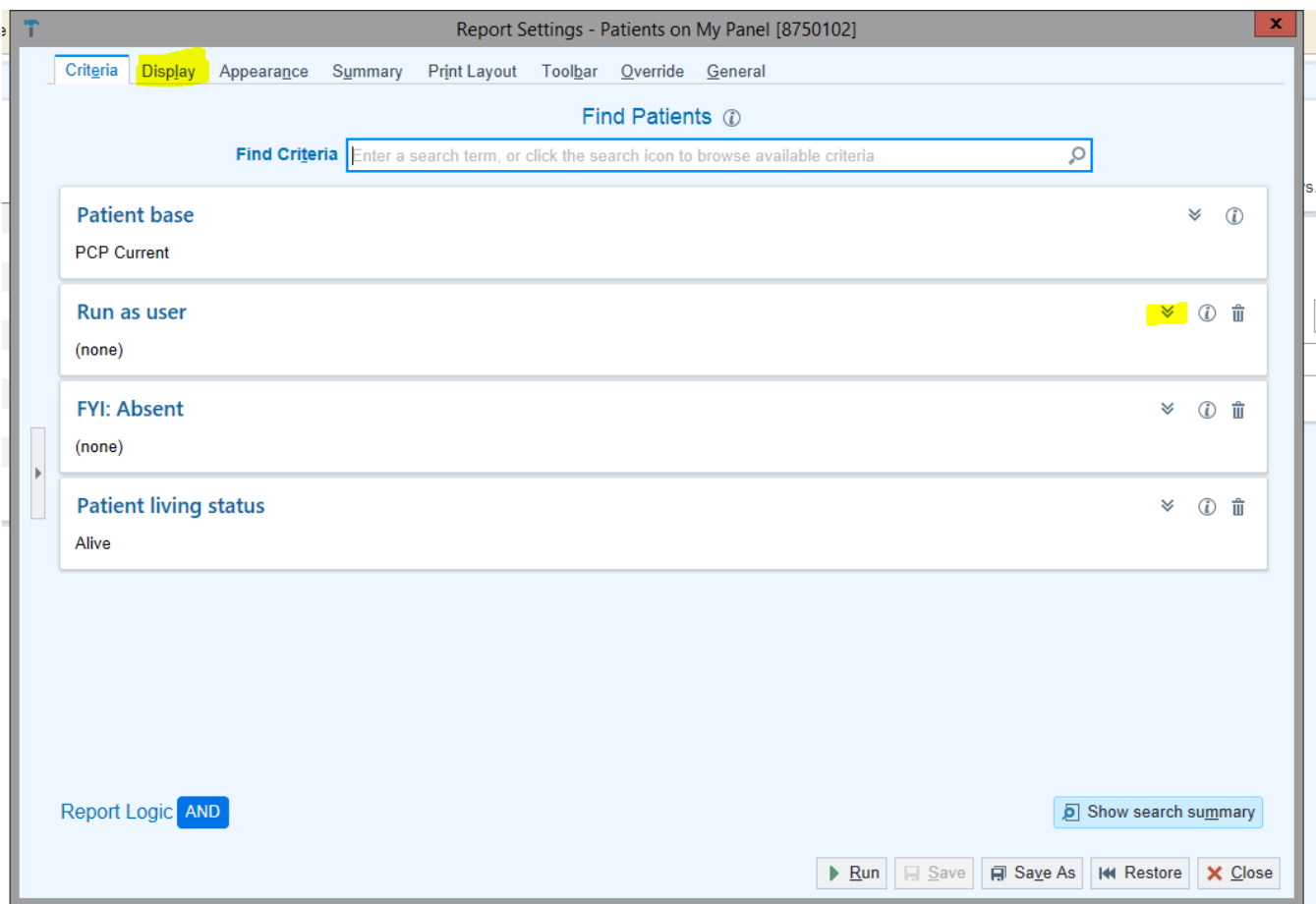
*\*Providers can click “Patients on My Panel” blue text to run a report on their own panel metrics*

## 2. Users running on behalf of providers: Click on the pencil next to “Patients on <X> Provider’s Panel” to select the user and run the report

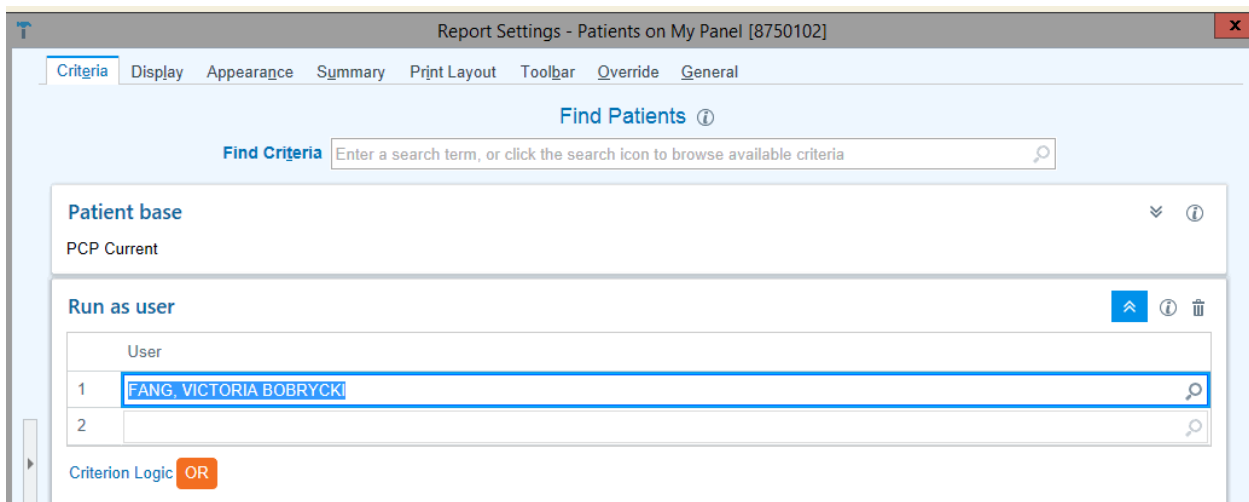
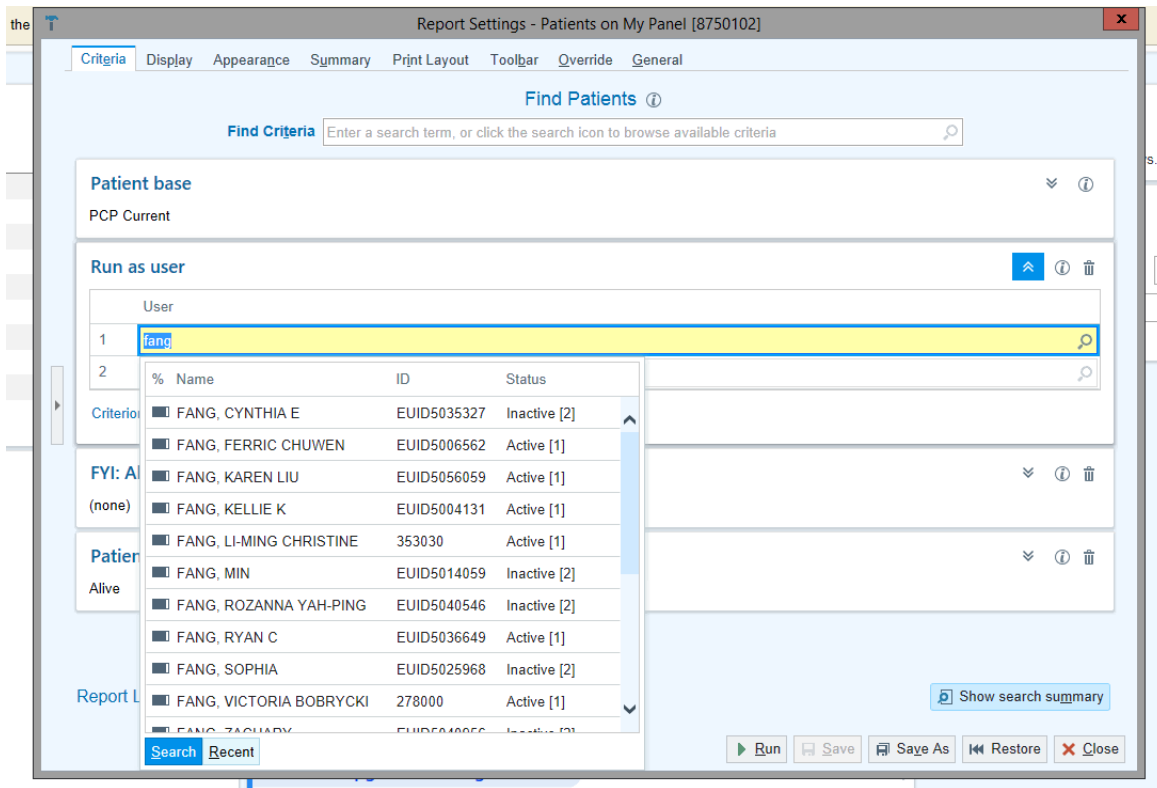


3. From the Report Settings screen, you can:

- Click the down arrows next to “Run as User” to select which Provider to run the report on behalf of.
- Click the Display tab to customize the columns you would like the report to display.

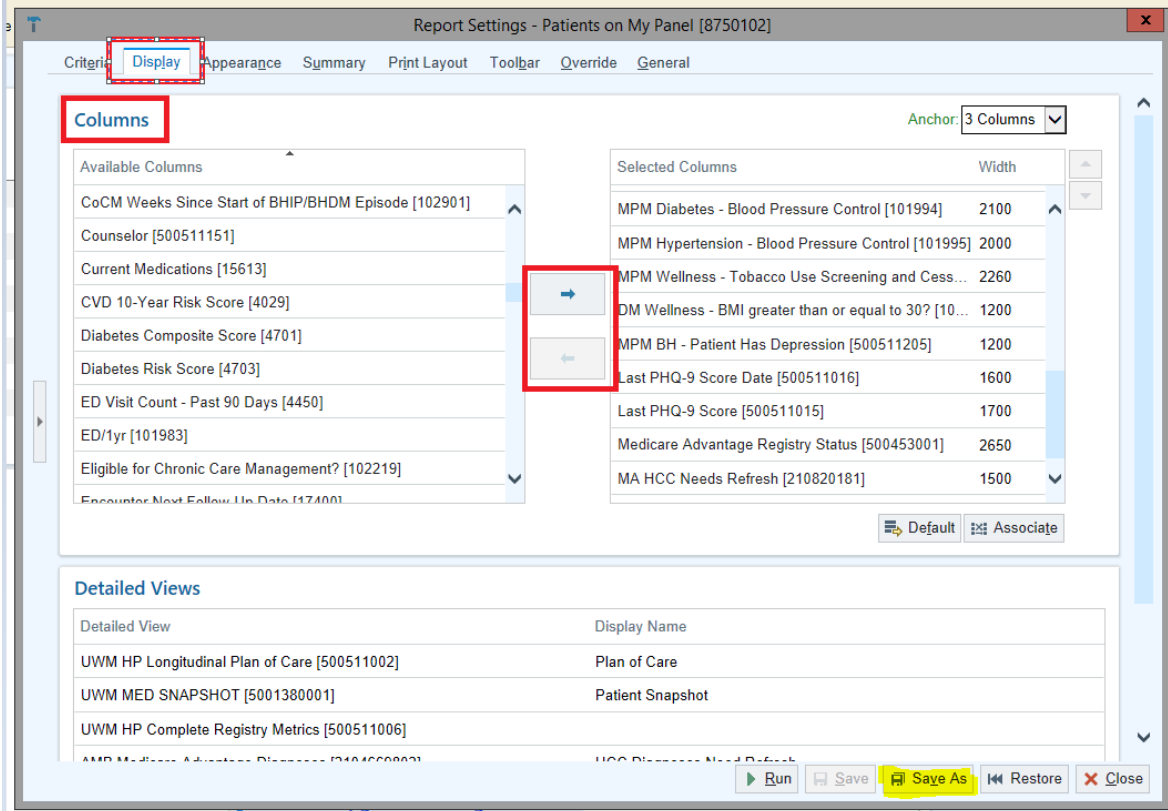


4. Search the last name of the provider and select their name from the list of Epic users that appears.

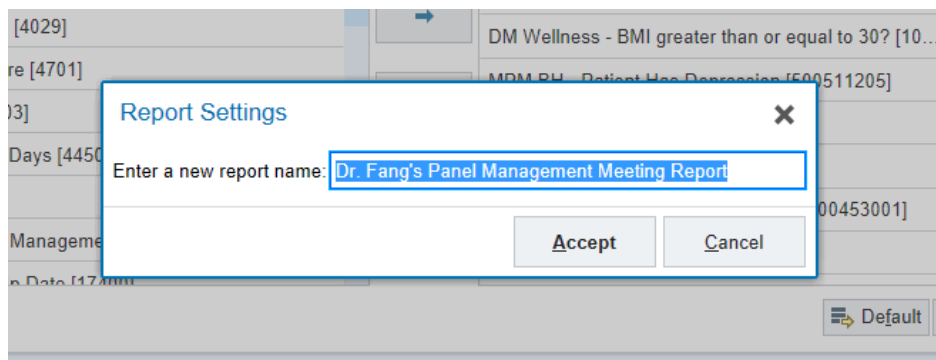


5. Use the Display tab to customize the columns you'd like to see displayed on the provider's custom panel report.

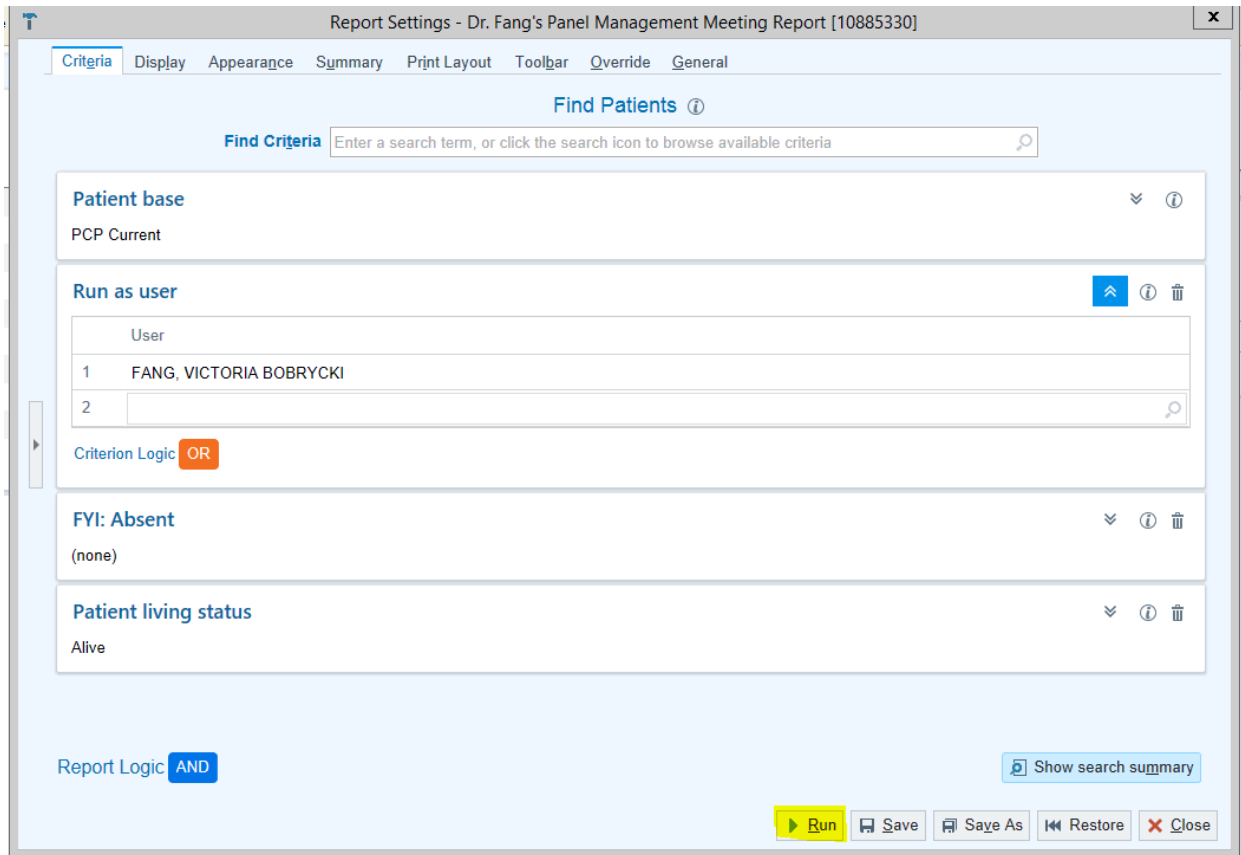
- Add columns from the left side and/or remove default columns from the right side by using the arrows.



- Within the Display tab, after selecting the columns you'd like to see, Save As the report.



6. After customizing the report's Provider Name and Display and clicked "Save As" to name the report, click "Run" to run the report.



7. The Report will run and display the provider's panel with the columns you selected when customizing the report:

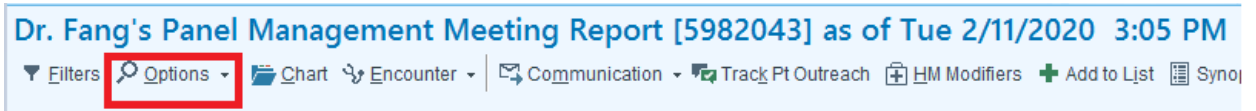
Dr. Fang's Panel Management Meeting Report [5982043] as of Tue 2/11/2020 3:05 PM

Filters Options Chart Encounter Communication Track Pt Outreach HM Modifiers Add to List Synopsis Questionnaire Series PCP Care Team Add to Care Path

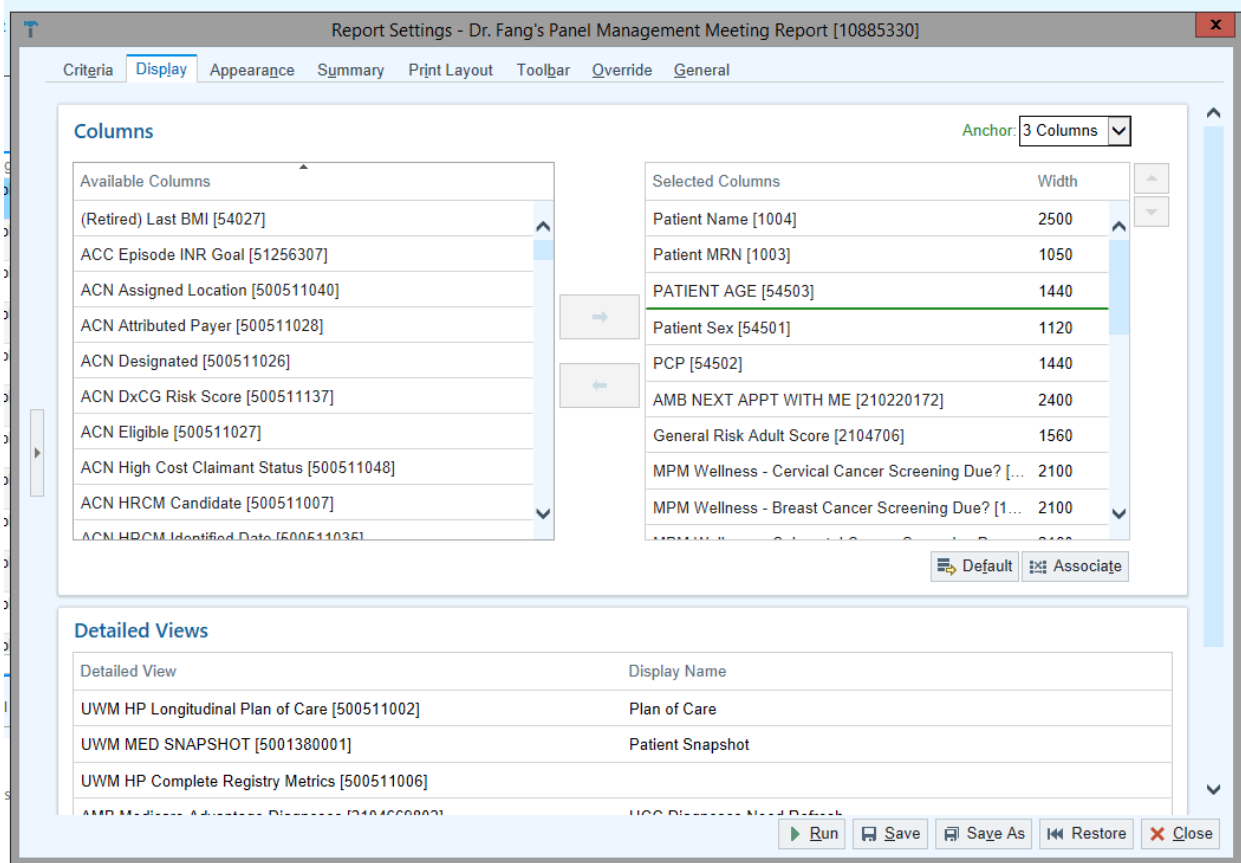
Not all results are currently loaded. Sorting and filtering apply only to the results that are currently loaded. It might take a moment to load the entire report.

Patient	MRN	Age Sex	PCP	Next Appt With Me	General Risk	Cervical Screen Due?	Breast Screen Due?	Colorectal Screen Due?	PHQ-2 Due?	Adult Pr
		87 year old Female	Fang, Victoria Bobrycki, MD		4		N/A	N/A	No	Met
		60 year old Male	Fang, Victoria Bobrycki, MD		0			N/A	Yes	
		90 year old Female	Fang, Victoria Bobrycki, MD		4		N/A	N/A	Yes	Met
		70 year old Male	Fang, Victoria Bobrycki, MD		1			No	No	Not Met
		66 year old Male	Fang, Victoria Bobrycki, MD		2	N/A	N/A	Yes	No	Met
		65 year old Female	Fang, Victoria Bobrycki, MD		3	No	No	No	Excl	Met
		76 year old Female	Fang, Victoria Bobrycki, MD		2		Yes	No	Excl	Not Met
		70 year old Male	Fang, Victoria Bobrycki, MD		5			N/A	Excl	Met
		95 year old Female	Fang, Victoria Bobrycki, MD		8		N/A	N/A	No	Met

8. You can edit the order of the columns or change the columns by clicking on "Options" and dropping down to "Edit Report Settings."



This displays same customization options as when you originally ran the report.



9. If you make additional changes, click Save (to override the original customizations and keep the same name), Save As (to keep your original version and rename the updated report, i.e. *Dr. Fang Diabetes Metrics Report*), and Run to see the report with new customizations.

Report Settings - Dr. Fang's Panel Management Meeting Report [10885330]

Criteria Display Appearance Summary Print Layout Toolbar Override General

**Columns** Anchor: 3 Columns

Available Columns	Selected Columns	Width
(Retired) Last BMI [54027]	Patient Name [1004]	2500
ACC Episode INR Goal [51256307]	Patient MRN [1003]	1050
ACN Assigned Location [500511040]	PATIENT AGE [54503]	1440
ACN Attributed Payer [500511028]	Patient Sex [54501]	1120
ACN Designated [500511026]	PCP [54502]	1440
ACN DxCG Risk Score [500511137]	AMB NEXT APPT WITH ME [210220172]	2400
ACN Eligible [500511027]	General Risk Adult Score [2104706]	1560
ACN High Cost Claimant Status [500511048]	MPM Wellness - Cervical Cancer Screening Due? [...]	2100
ACN HRCM Candidate [500511007]	MPM Wellness - Breast Cancer Screening Due? [1...	2100
ACN HRCM Identified Date [500511035]		

Default Associate

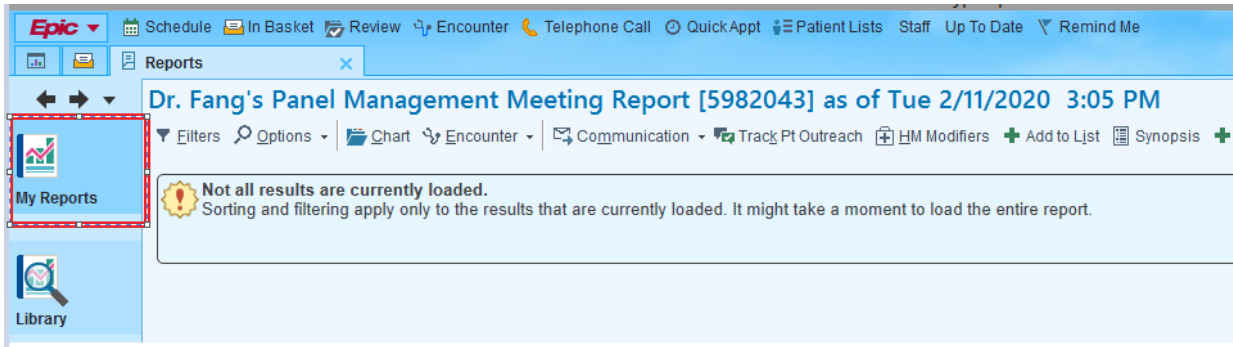
**Detailed Views**

Detailed View	Display Name
UWM HP Longitudinal Plan of Care [500511002]	Plan of Care
UWM MED SNAPSHOT [5001380001]	Patient Snapshot
UWM HP Complete Registry Metrics [500511006]	
AMB Medical Adherence Discontinuation [2104660001]	USC Discontinuation Report

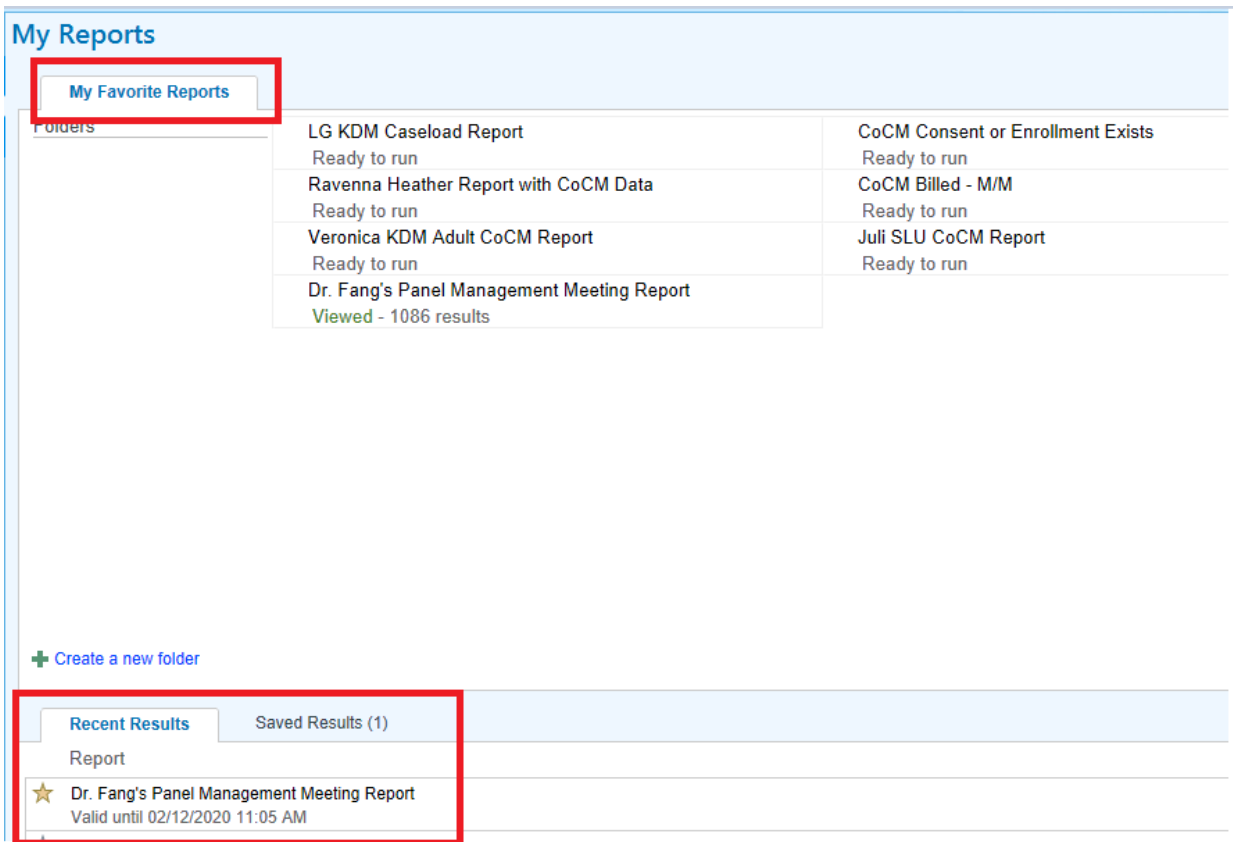
Run Save Save As Restore Close



## 10. To Favorite the Report for future reference, click on “My Reports”



## 11. Under Recent Results, click the Star next to the Provider’s Panel Management Report. This will save it as a Favorite. In the Future, it will show up in the “My Favorite Reports” List.



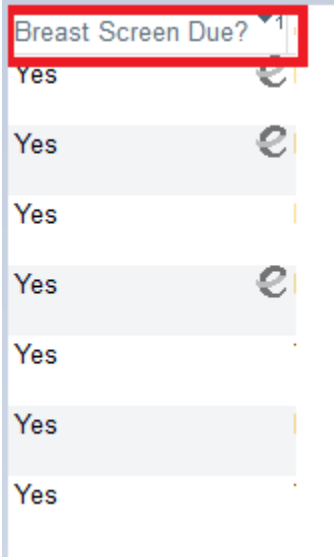
## Tips & Tricks for Maximizing Use of Panel Reports

Use the Filter option to filter patients displayed by specific criteria

The screenshot shows the 'Dr. Fang's Panel Manage' interface. At the top, there is a navigation bar with 'Filters' (highlighted with a red box), 'Options', and 'Chart'. Below this is a warning message: 'Not all results are currently loaded. Sorting and filtering apply only to the data that is currently loaded.' The main area contains a list of filterable criteria, each with a checkbox:

- Patient
- MRN
- Age
- Sex
- PCP
- Next Appt With Me
- General Risk
- Cervical Screen Due?
- Breast Screen Due?
- Colorectal Screen Due?
- PHQ-2 Due?
- Adult Pneumonia Vacc Sta...
- Childhd Imm Status
- Adolesc Imm Status
- Diabetes A1c Poor Control?
- Diabetes Retinal Exam?
- Diabetes BP Control?
- HTN BP Control?
- Tobacco Use Screening?
- BMI >= 30?
- Depression?
- Last PHQ-9 Date
- Last PHQ-9 Score
- Med Adv
- HCC Refresh Needed
- Last Annual Wellness Visit

Click on any Column Name to display the values ascending or descending, and sort the rest of the report according to that column



Breast Screen Due?
Yes
Yes
Yes
Yes
Yes
Yes
Yes

Note: The data on this report may have a 1-2 week lag. For example, the “Last Appointment Date” column may not reflect visits in the past 7-14 days. To validate data on this report you can click on the patient’s name/row to open the full patient chart for review.