Electronic Health Record (EHR) instructions

How to create a **Pursuit List** to find patients not achieving 3 low risk criteria **via French non-invasive method** in the **Cerner**® EHR system

PAH Initiative
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Background

These instructions are created specifically to create a Pursuit List in the Cerner Electronic Health Record (EHR) system to identify diagnosed adult PAH patients who have less than three low-risk criteria using the French non-invasive method. They will not work for other conditions, treatments, therapeutic areas, or on other EHR systems.

The process outlined in this document is variable and unique to the Cerner EHR system, and not all steps and/or reporting tools will be available or apply to every health system. Any steps or settings that are not part of a health system's standard process should be excluded or modified accordingly. Any questions should be directed to your EHR team or EHR system provider. The practice is solely responsible for implementing, testing, monitoring, and ongoing operation of any EHR tools.

The ability to find patients meeting the clinical variables in an EHR is dependent on the availability and use of structured (or discrete) data. First confirm if the documentation of the clinical variables currently leverages structured data elements. If the data were entered using unstructured data (such as free text, for example), patients meeting the clinical variables will not appear in the report.

These instructions are for informational use only by EHR users. EHR systems, implementations, and configurations may vary. There is no guarantee that these instructions will work on a user's EHR. United Therapeutics Corporation has no obligation to revise or update any of these instructions. These instructions do not replace any information provided to the user by the EHR support resources. These instructions are not to be used to meet Meaningful Use, Advancing Care Information, and/or any other quality/accreditation requirements. Nothing herein is intended to be used as or in place of professional or medical advice, judgment, diagnosis, or treatment. Use of these instructions does not create a doctor-patient or other healthcare professional relationship between United Therapeutics Corporation and any person. Healthcare decisions must be made by a healthcare provider in consultation with a patient. All rights in the product names, company names, trade names, or other marks remain the exclusive property of their respective holders. Reference to products or company names does not imply affiliation or endorsement.

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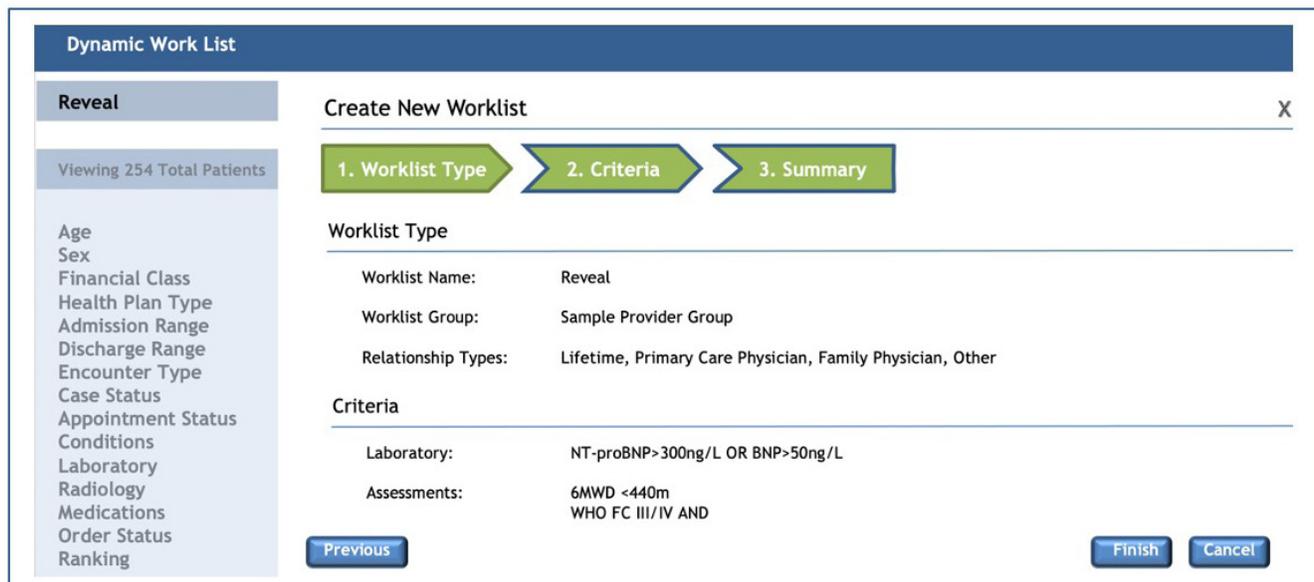
Clinical Variables

The French non-invasive method evaluates the number of low-risk criteria using 6MWD, WHO FC, and NT-proBNP OR BNP. Values that do not meet low-risk criteria include:

- 6MWD <440m
- WHO FC III/IV
- NT-proBNP >300 ng/L OR BNP >50 ng/L

Instructions to identify patients not meeting 3 low-risk criteria via the French non-invasive method

There are 2 options to create a Pursuit List to find patients not meeting 3 low-risk criteria via the French non-invasive method: **Dynamic Worklist** and **Discern Analytics 2.**

Option 1 – Dynamic Worklist

This is an example of what a Dynamic Worklist may look like in your system

1. Select Dynamic Worklist from the menu. The Dynamic Worklist wizard will display.
2. Select Create Worklist from the List Actions drop-down menu
3. The Create New Worklist wizard contains 3 tabs: 1. Worklist Type, 2. Criteria, and 3. Summary.

1. Worklist Type

   a. Enter a name in the Name Your Worklist field to define the Pursuit List

   b. Select the radio button for Group/Provider or Location as desired, and complete the Group/Provider's Relationship Type or the Location's Facility, Building, and Unit

   c. In the Relationship Type, select all desired roles (for example, Primary Care Physician, Nurse Practitioner, etc.). This may vary based on how the EHR was set up
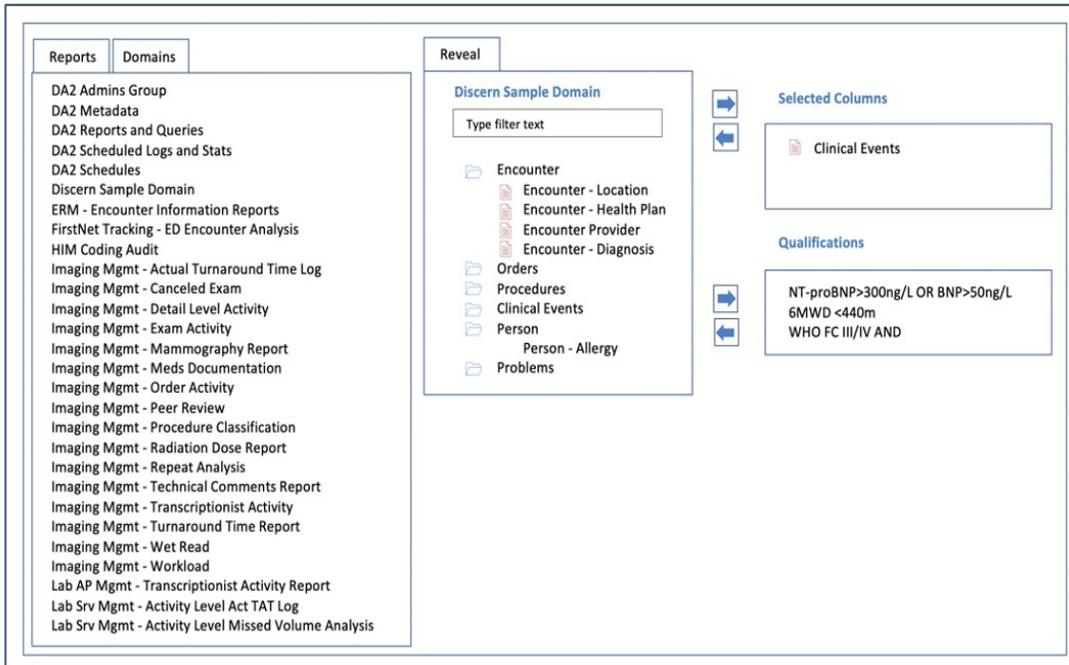
   d. Click Next

2. Criteria

   a. In the Criteria step, the inclusion criteria are added to narrow down the population

   b. Click on the Laboratory criteria

   c. Set the operator logic to AND

   d. Enter NT-proBNP in the search field

   e. Select the desired range to greater than 300 ng/L and set the look-back range

   f. Click on the Laboratory criteria

   g. Set the operator logic to OR

   h. Enter BNP in the search field

   i. Select the desired range to greater than 50 ng/L and set the look-back range

   j. Click on the Assessments criteria. Depending on the set-up of Dynamic Worklist by the organization, the 6MWD and WHO FC may have to be added to the Results, Measurements, or Assessments filter. With the right admin privileges, access the Bedrock wizard, and set up the Clinical Event Concept and the Event Filters

   k. Set the operator logic to AND

   l. Enter 6MWD in the search field, and set the range to less than 440m. Click Add.

   m. Enter WHO FC in the search field, and set the filter to include classes III or IV. Click Add.

   n. Click Next

3. Summary

   a. Review the selected criteria and click Finish to run the Pursuit List

   b. The names of patients will display. Clicking on the List Actions drop-down menu allows you to export the list of patients to Excel by clicking Export.

   Optional: Patients can be reached by clicking Generate Communication. A new window will open where a letter template can be created and sent to the patient.

This is an example of what Discern Analytics 2.0 may look like in your system

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 Clinical Events Results Filter

6. Select NT-proBNP from the available list of qualifications

7. Set the range to greater than 300 ng/L. Click Include.

8. Select BNP from the available list of qualifications

9. Set the range to greater than 50 ng/L. Click Include.

10. In the Qualifications window, select the Clinical Events Results Filter

11. Select 6MWD from the available list of qualifications

12. Set the range to less than 440 m. Click Include.

13. In the Qualifications window, select the Clinical Events Results Filter

14. Select WHO FC from the available list of qualifications

15. Set the range to include classes III or IV. Click Include.

16. Set the operator logic to AND to indicate that all qualifications must be satisfied

17. Select all the desired columns to include in the report by clicking the right arrow or dragging the selected folders to the Columns window

18. Consider a column that uses the Date and Date/Time qualifications to set the look-back period

19. Set the general criteria for the report (name, version, time-out range, etc.) and save the query

20. Click Query > Query review or choose Run Query in Viewer in the Query tab to run the query

21. The results will display. The results may be further manipulated if desired by exporting to Excel.

Optional: Patients can be reached by clicking Generate Communication.
A new window will open where a letter template can be created and sent to the patient.

Notes

- The Customers (i.e., physician, medical group, IDN) shall be solely responsible for implementation, testing, and monitoring of the instructions to ensure proper orientation in each Customer's EHR system.

- Capabilities, functionality, and set-up (customization) for each individual EHR system vary. Changes in software or configuration of the EHR system may affect the use of these instructions. United Therapeutics has no responsibility to update these instructions for any Customer.

- While United Therapeutics tests its implementation instructions on multiple EHR systems, the instructions are not guaranteed to work for all available EHR systems.

- While EHRs may assist providers in identifying appropriate patients for consideration of assessment and treatment, the decision and action should ultimately be decided by a provider in consultation with the patient, after a review of the patient's records to determine eligibility.

- The instructions have not been designed to and are not tools and/or solutions for meeting Meaningful Use, Advancing Care Information, and/or any other quality/accreditation requirement.

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