

# Electronic Health Record (EHR) instructions

How to create a **Pursuit List**  
to find patients in the  
**Epic®** EHR system

- Patients not meeting low risk status via the **REVEAL 2.0 Risk Calculator**
- Patients with fewer than 3 low risk **non-invasive criteria** via the **French method**



**PAH Initiative**

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These instructions are created specifically to create a Pursuit List in the Epic Electronic Health Record (EHR) system to identify diagnosed adult PAH patients not at low risk status as defined by REVEAL 2.0 or those with less than 3 low risk criteria as defined by 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 Epic 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.

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The REVEAL 2.0 Risk Calculator includes 2 key sections to help you assess the risk status of your patients:

## Section 1: The questions

- Each question is individually scored

## Section 2: The Scoring Algorithm

- Responses to at least 7 of the 13 questions are required to calculate a risk score
- All individual results are added together to calculate the REVEAL 2.0 score

## Score Interpretation

- Low risk: 0-6
- Intermediate risk: 7-8
- High risk:  $\geq 9$

## About the French non-invasive method

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

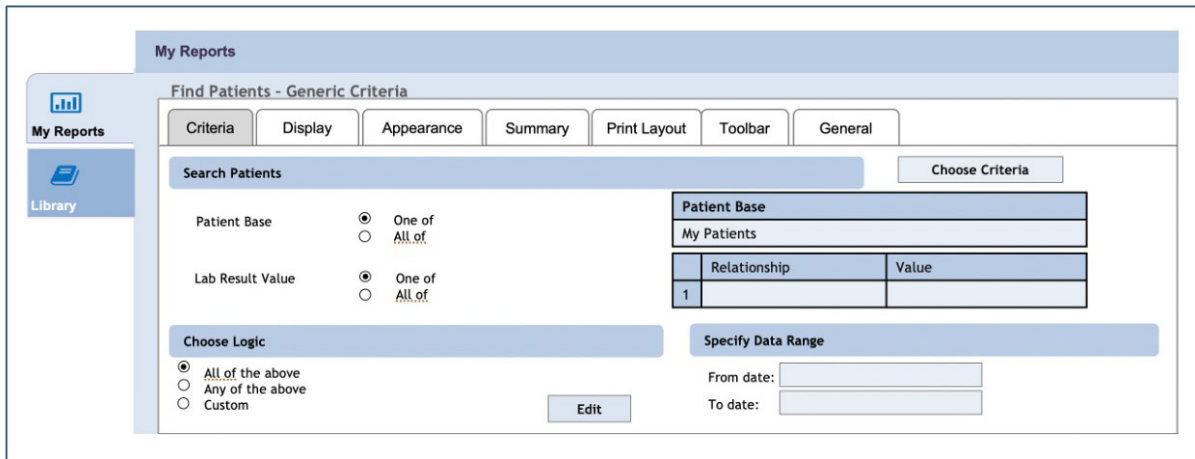
## Instructions to create Pursuit Lists using risk criteria to identify patients

There are 2 options to create a Pursuit List to find patients not meeting 3 low-risk criteria via the French non-invasive method: Reporting Workbench and SlicerDicer.

The REVEAL 2.0 score can be added to the Reporting Workbench reports by creating a new column. The Reporting Workbench can be modified to identify patients.

Consult your organization if additional user rights are required to access these functions.

# Option 1: Create Pursuit List using Reporting Workbench (French non-invasive method)



The screenshot shows the 'My Reports' section of the Reporting Workbench. The main area is titled 'Find Patients - Generic Criteria' and contains several tabs: Criteria, Display, Appearance, Summary, Print Layout, Toolbar, and General. The 'Criteria' tab is active, showing a search interface. On the left, there are sections for 'Patient Base' (with radio buttons for 'One of' and 'All of'), 'Lab Result Value' (with radio buttons for 'One of' and 'All of'), and 'Choose Logic' (with radio buttons for 'All of the above', 'Any of the above', and 'Custom'). On the right, there is a 'Specify Data Range' section with 'From date' and 'To date' input fields. A table with columns 'Relationship' and 'Value' is also visible, with a row containing the number '1'. An 'Edit' button is located at the bottom center.

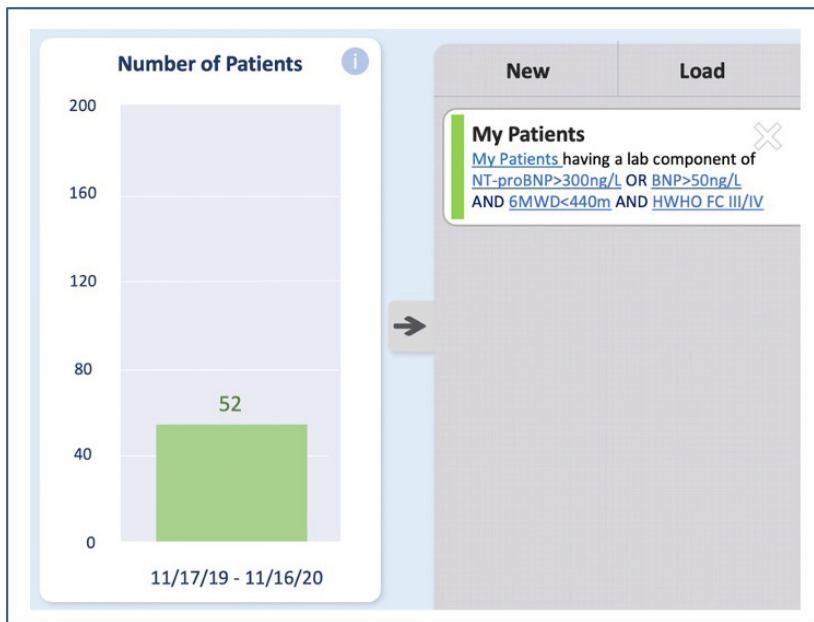
This is an example of what Reporting Workbench may look like in your system

1. Access Reporting Workbench (click Epic logo > Reports > My Reports)
2. Navigate to the Library tab from the Reports menu
3. Enter “generic criteria” or “find patients” in the search field and click Search
4. Select the Find My Patients – Generic Criteria report and click New
5. The Report Settings field will display. Click the Criteria tab in the toolbar
6. Click Add and select a criterion. Enter “last result value” in the search field.
7. Select Last Result Value criteria. Enter NT-proBNP in the Value field. (Depending on how the lab catalog was created, the description of the lab result may vary.)
8. Set the Range to greater than 300 ng/L.
9. Click Add and select a criterion. Enter “last result value” in the search field.
10. Select Last Result Value criteria. Enter BNP in the Value field. (Depending on how the lab catalog was created, the description of the lab result may vary.)
11. Set the Range to greater than 50 ng/L.
12. Repeat steps 6-8 for the 6MWD. Set the range to less than 440 m
13. Repeat steps 6-8 for the WHO FC. Set the operator logic to include III or IV.
14. Set the operator logic rule to:
  - a. 6MWD <440m
  - b. WHO FC III/IV AND
  - c. NT-proBNP >300 ng/L OR BNP >50 ng/L
15. In the General tab, enter the desired Report Name and a Description
16. Click Save and Run to create the Pursuit List. The list will display all patients matching the criteria
17. To reach out to patients, click the Communication button from the menu. There are 4 op-

tions available and patients will be sorted based on their preferred method of communication (the number indicates the number of patients):

- a. Mail
- b. Phone
- c. MyChart
- d. Do Not Contact (patients who have expressed to not be contacted and will not receive any outbound message)

## Option 2: Create Pursuit List using SlicerDicer (French non-invasive method)



This is an example of what Slicer Dicer may look like in your system

1. Access SlicerDicer (click Epic logo > Reports > SlicerDicer)
2. Click New to start a new query
3. Click the drop-down arrow next to All Patients, and select My Patients from the list
4. Click + Add Criteria. A new window will display.
5. Select the All tab on the bottom of the SlicerDicer window to display all filters.
6. Click the Lab Components folder.
7. Click in the Lab component field

and enter NT-proBNP. Select NT-proBNP (Depending on how the lab catalog was created, the description of the lab result may vary)

8. Set the Range to greater than 300 ng/L.
9. Click + Add Criteria. A new window will display.
10. Select the All tab on the bottom of the SlicerDicer window to display all filters.
11. Click the Lab Components folder.
12. Click in the Lab component field and enter BNP. Select BNP (Depending on how the lab catalog was created, the description of the lab result may vary)
13. Set the Range to greater than 50 ng/L.
14. Click + Add Criteria. A new window will display.

15. Select the All tab on the bottom of the SlicerDicer window to display all filters.
16. Click the Flowsheet folder.
17. Select 6MWD. (Depending on how the Flowsheet was created, the description of the Flowsheet Value result may vary.)
18. Set the range to less than 440 m
19. Click + Add Criteria. A new window will display.
20. Select the All tab on the bottom of the SlicerDicer window to display all filters.
21. Click the Flowsheet folder.
22. Select WHO FC. (Depending on how the Flowsheet was created, the description of the Flowsheet Value result may vary.)
23. Set the operator logic to include III or IV.
24. Set the operator logic rule to:
  - a. 6MWD <440m
  - b. WHO FC III/IV AND
  - c. NT-proBNP >300 ng/L OR BNP >50 ng/L
25. Click Save As to save the query and refine the query results
26. Export the new report to Reporting Workbench
27. In the General tab, enter the desired Report Name and a Description
28. Click Save and Run to create the Pursuit List. The list will display all patients matching the criteria
29. To reach out to patients, click the Communication button from the menu. There are 4 options available and patients will be sorted based on their preferred method of communication (the number indicates the number of patients):
  - a. Mail
  - b. Phone
  - c. MyChart
  - d. Do Not Contact (patients who have expressed to not be contacted and will not receive any outbound message)

# Adding a column to Reporting Workbench results to display the REVEAL 2.0 score

A new column with the REVEAL 2.0 score can be created and made available for Reporting Workbench Reports. Depending on how the REVEAL 2.0 score was created (SmartForm or Flowsheet), the ID of the REVEAL 2.0 score can be added to Reporting Workbench reports by creating a new column.

If the REVEAL 2.0 Risk Calculator values were created using a SmartForm that uses SmartData elements (for example the Last REVEAL 2.0 SmartData Value), the REVEAL 2.0 score can be added as a report column using custom extensions.

If the REVEAL 2.0 Risk Calculator was created using a Flowsheet, a report column can be added to the report to capture REVEAL 2.0 Risk Calculator data elements (for example, the Last REVEAL 2.0 score Flowsheet Value). A Registry Metric can be created for the REVEAL 2.0 score, and subsequently, the Registry Metric can be displayed in a new Column Record.

## Once a Reporting Workbench has been created, add the REVEAL 2.0 column:

1. Select the Display tab, and select the desired columns
2. Add the column with the REVEAL 2.0 registry metric value
3. In the General tab, enter the desired Report Name and a Description
4. Click Save and Run to create the Pursuit List. The list will display all patients matching the criteria
5. Set the filter for the column with the REVEAL 2.0 score to greater than 6
6. To reach out to patients, click the Communication button from the menu. There are 4 options available and patients will be sorted based on their preferred method of communication (the number indicates the number of patients):
  - a. Mail
  - b. Phone
  - c. MyChart
  - d. Do Not Contact (patients who have expressed to not be contacted will not receive any outbound message)

# 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.
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- 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.
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US-DS-0557

