



PulseTM

Electronic Healthcare Management

Health Maintenance (EHR)

March 31, 2014

We care for
your practice,
as if it were
our own.

About This Document

The following document details the features and workflow of the *Health Maintenance* module available within the Pulse Complete EHR software. Functionality described within the document is intended for 4.2 or newer versions of the Pulse Complete EHR software.

The Pulse Complete EHR software is under constant development and reference materials undergo frequent revisions. The most recent versions of all Pulse reference materials are always available online at <http://pace.pulseinc.com/>.

Acknowledgments

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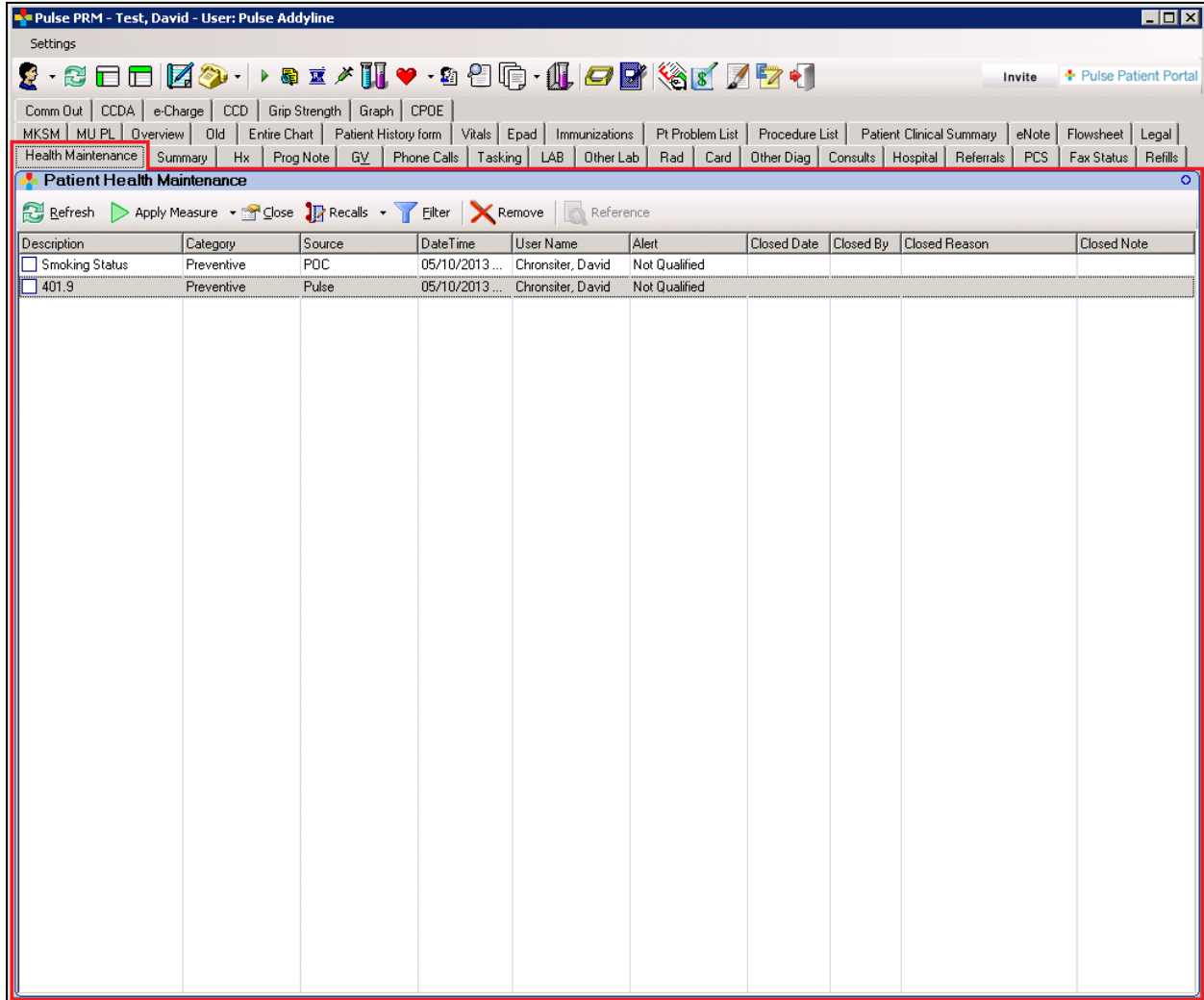
Table of Contents

1. Introduction	4
1.1 Purpose	4
1.2 Document Conventions	4
1.3 Intended Audience and Reading Suggestions	4
1.4 Project Scope	5
1.5 Definition of Measures and Rules.....	5
2. Health Maintenance Module Overview	6
2.1 Initialization	6
2.2 Dashboard Configuration – Patient Health Maintenance	7
2.3 Dashboard Configuration – Batch Health Maintenance	9
2.4 Patient Health Maintenance module.....	11
2.5 Batch Health Maintenance module.....	14
2.6 Measure Selection window.....	19
2.7 New Measure window.....	21
2.7.1 Understanding Rules within a Measure	24
2.7.2 Understanding Rule Logic	26
3. Workflow	28
3.1 Accessing the Patient Health Maintenance module	28
3.2 Selecting a measure within the Patient Health Maintenance module	29
3.3 Creating a measure within the Patient Health Maintenance module	30
3.4 Closing a measure within the Patient Health Maintenance module	34
3.5 Utilizing Recalls Management within the Patient Health Maintenance module.....	35
3.6 Filtering results within the Patient Health Maintenance module.....	41
3.7 Filtering results within the Batch Health Maintenance module.....	42
3.8 Overview of the Measure Alert window	45



1. Introduction

Health Maintenance is a data-mining tool that can be utilized when sorting through data on one specific patient or sorting through data for all patients within a database. *Health Maintenance* gives users the ability to retrieve information from the system based on designated measures, allowing staff to provide top quality wellness and preventive services and disease management.



The Health Maintenance module within the Patient Dashboard main window

1.1 Purpose

Provide clients with comprehensive documentation for the overall functionality of the *Health Maintenance* module.

1.2 Document Conventions

This document is written in standard language and is intended to be easily understood by any person with basic computer knowledge.

1.3 Intended Audience and Reading Suggestions

Written primarily for the end-user, this document is applicable for review and discussion with all clinical support staff.

1.4 Project Scope

This document provides end-users with thorough element descriptions and detailed workflows of the *Health Maintenance* module.

1.5 Definition of Measures and Rules

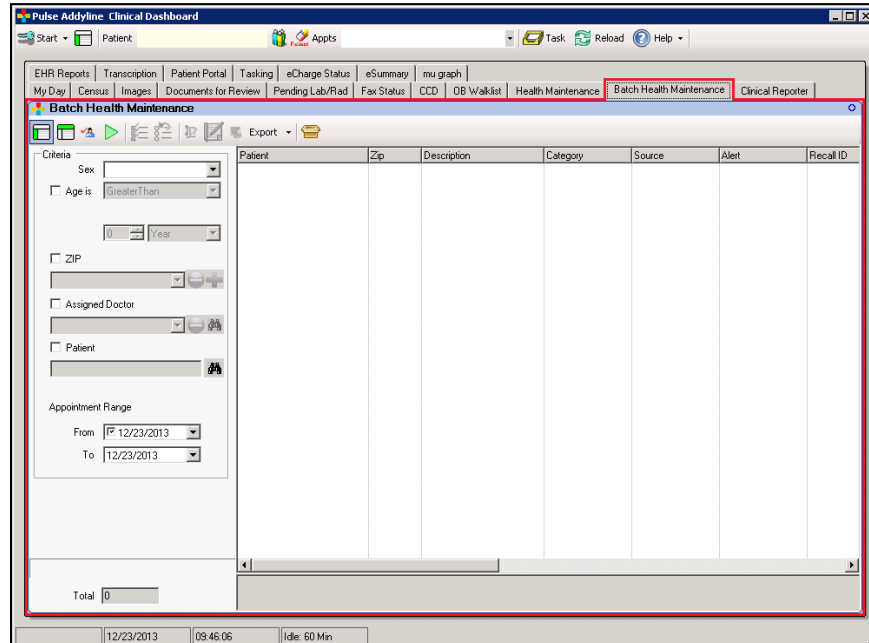
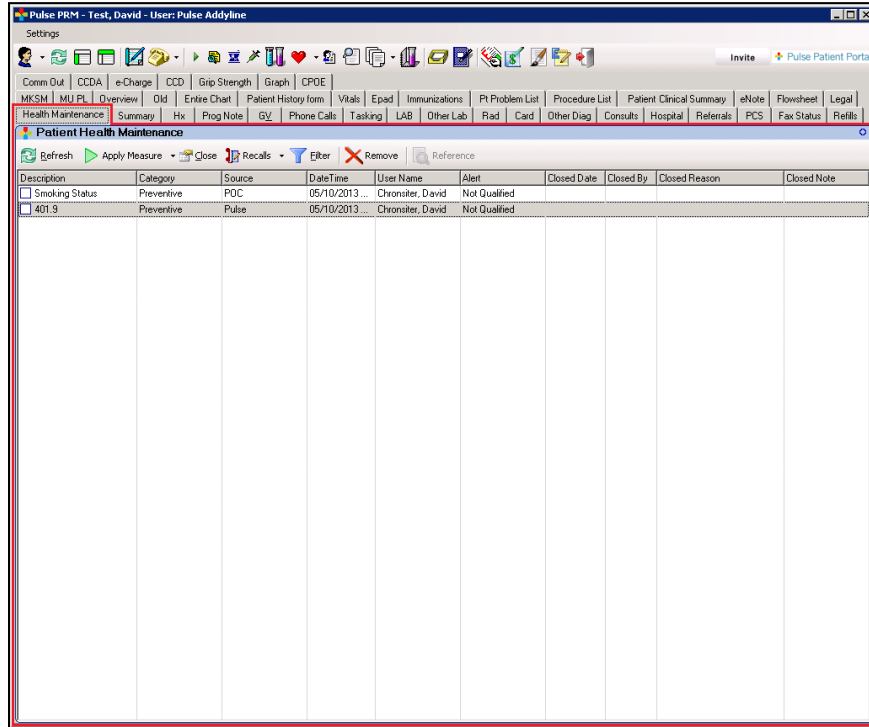
Measures – A measure is a set of rules that are applied to patient data for data mining purposes

Rules – A rule consists of smaller information units within a measure (e.g., age, gender, diagnosis, etc.)

2. Health Maintenance Module Overview

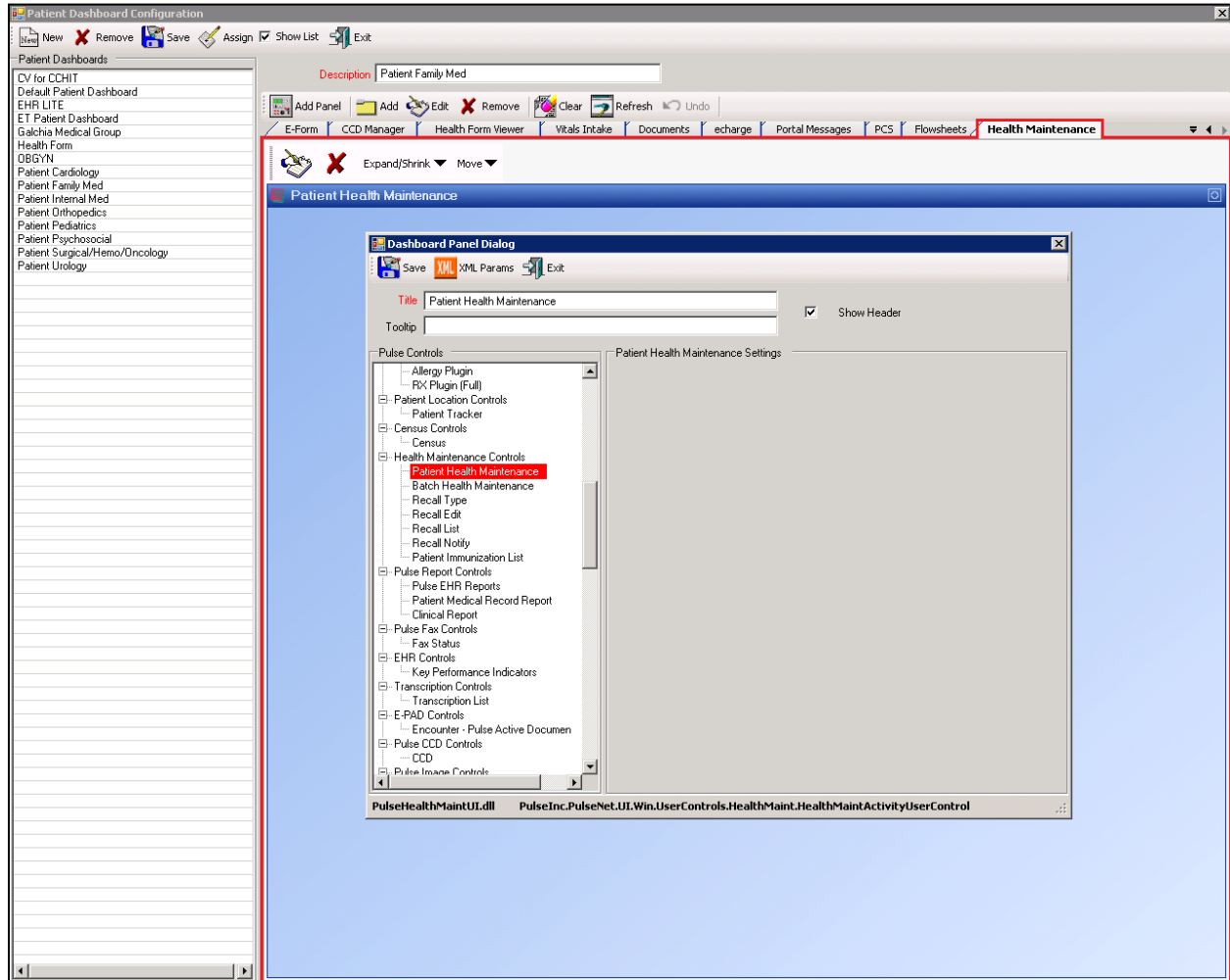
2.1 Initialization



The *Patient Health Maintenance* module can be accessed as a plug-in within the Patient Dashboard. The *Batch Health Maintenance* module can be accessed as plug-in within the User Dashboard.

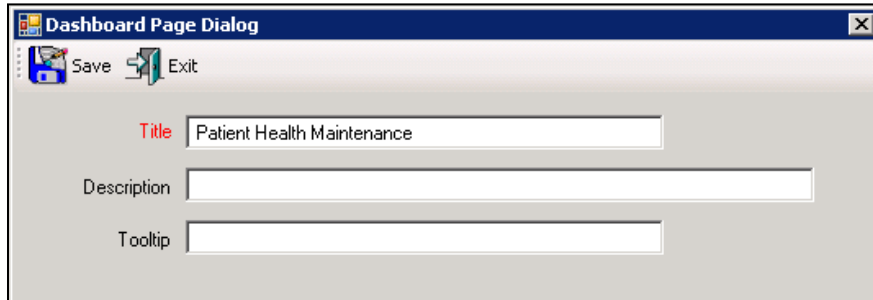





2.2 Dashboard Configuration – Patient Health Maintenance

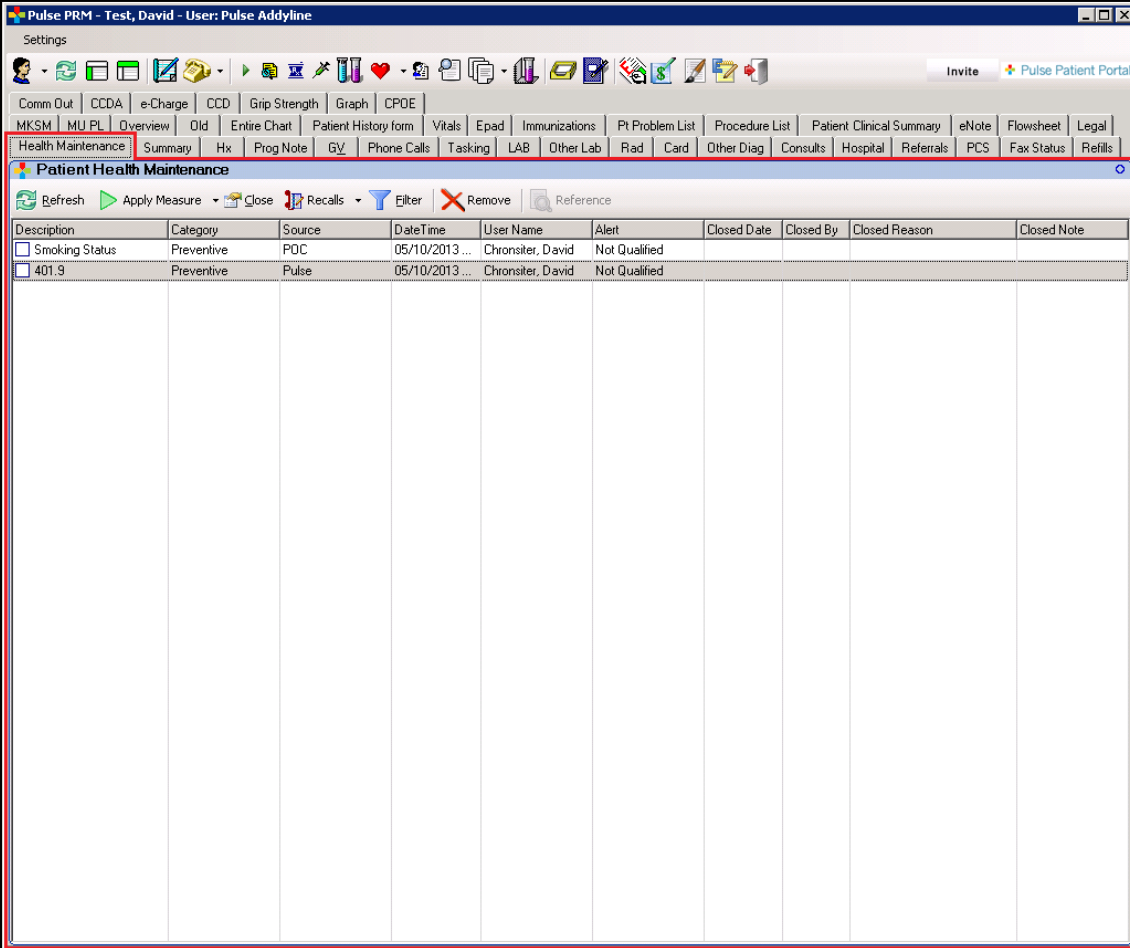
Perform the following to configure a *Patient Health Maintenance* panel within the Patient Dashboard:



1. From the *Clinical Dashboard*, click **Patient Dashboards** from the *Administration* menu within the *Modules* panel.
2. The *Patient Dashboard Configuration* window displays. Select the appropriate dashboard from the *Patient Dashboards* section.
3. Click the  **Add Dashboard Page** toolbar icon
4. The *Dashboard Page Dialog* window displays. Enter "Patient Health Maintenance" within the *Title* field and click  **Save**.



5. Within the *Patient Health Maintenance* page, click the  **Add Dashboard Panel** toolbar icon.
6. The *Dashboard Panel Dialog* window displays
7. Under the *Pulse Controls* section of the window, locate and select *Health Maintenance Controls* → *Patient Health Maintenance*.
8. With *Patient Health Maintenance* selected, enter the name of the panel (as it will display within the *Patient Dashboard*) within the *Title* field.
9. Currently, there are no configurable settings available for the *Patient Health Maintenance* module. Users simply add the *Patient Health Maintenance* panel to the *Patient Dashboard* through the *Dashboard Configuration*.
10. Once complete, click  **Save** within the *Dashboard Panel Dialog* window.
11. Within the *Patient Dashboard Configuration* window, click  **Save**.
12. The *Patient Health Maintenance* panel is now configured and available within the *Patient Dashboard*.



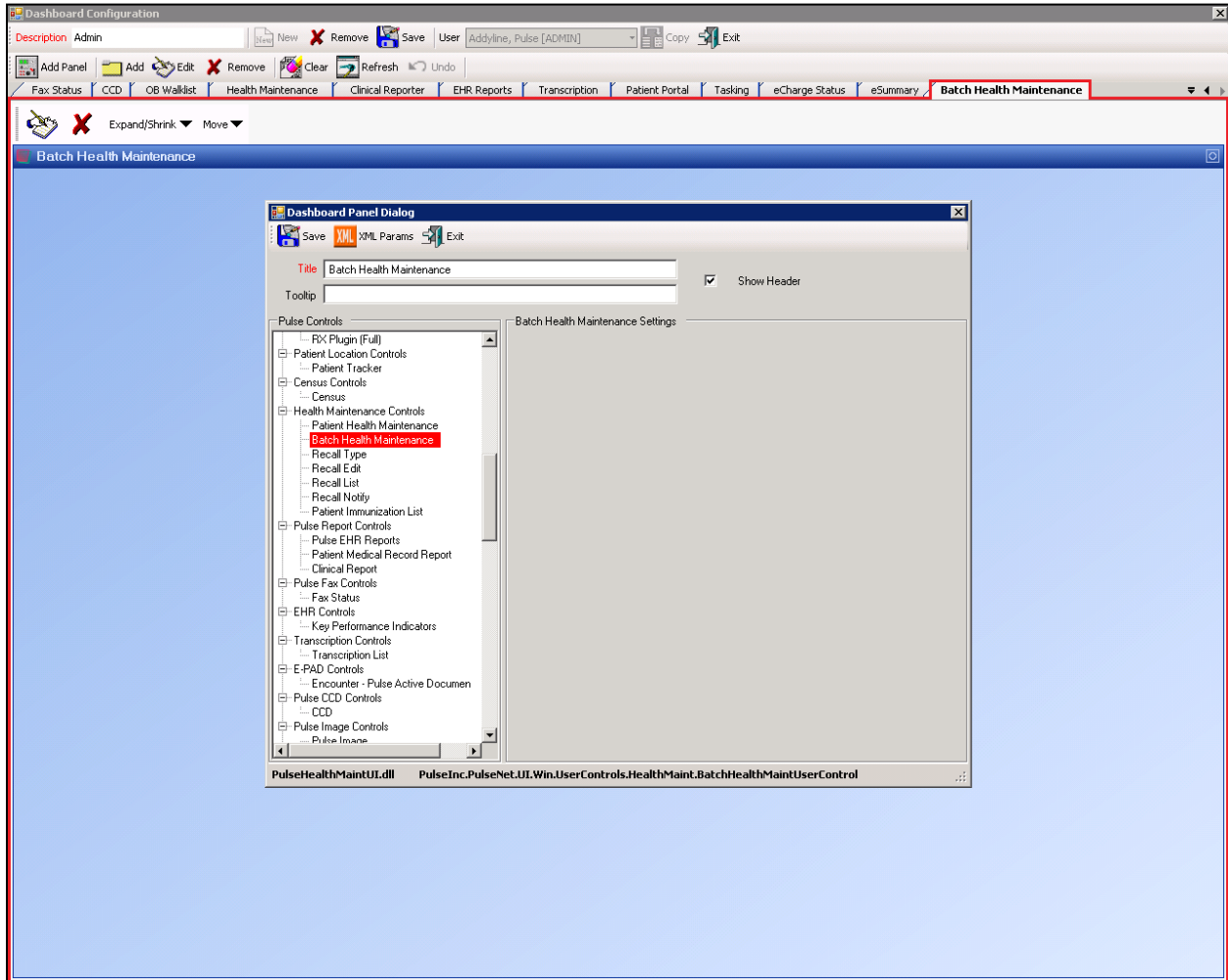
The screenshot shows the Pulse PRM software interface. The main window title is "Pulse PRM - Test, David - User: Pulse Addyline". The interface includes a top toolbar with various icons and a menu bar with options like "Comm Out", "CCDA", "e-Chart", "CCD", "Grip Strength", "Graph", "CPDE", "MKS", "MU PL", "Overview", "Old", "Entire Chart", "Patient History form", "Vitals", "Epad", "Immunizations", "Pt Problem List", "Procedure List", "Patient Clinical Summary", "eNote", "Flowsheet", "Legal", "Health Maintenance", "Summary", "Hx", "Prog Note", "GV", "Phone Calls", "Tasking", "LAB", "Other Lab", "Rad", "Card", "Other Diag", "Consults", "Hospital", "Referrals", "PCS", "Fax Status", and "Refills".



The "Patient Health Maintenance" panel is active, showing a toolbar with "Refresh", "Apply Measure", "Close", "Recalls", "Filter", "Remove", and "Reference". Below the toolbar is a table with the following data:

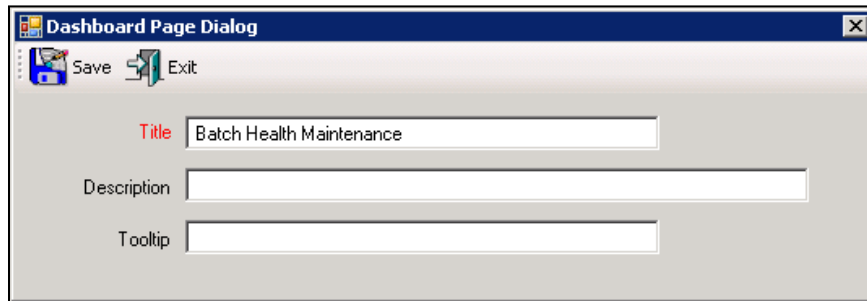
Description	Category	Source	DateTime	User Name	Alert	Closed Date	Closed By	Closed Reason	Closed Note
<input type="checkbox"/> Smoking Status	Preventive	POC	05/10/2013 ...	Chronsiter, David	Not Qualified				
<input type="checkbox"/> 401.9	Preventive	Pulse	05/10/2013 ...	Chronsiter, David	Not Qualified				


2.3 Dashboard Configuration – Batch Health Maintenance



Perform the following to configure a *Batch Health Maintenance* panel within the *User Dashboard*:

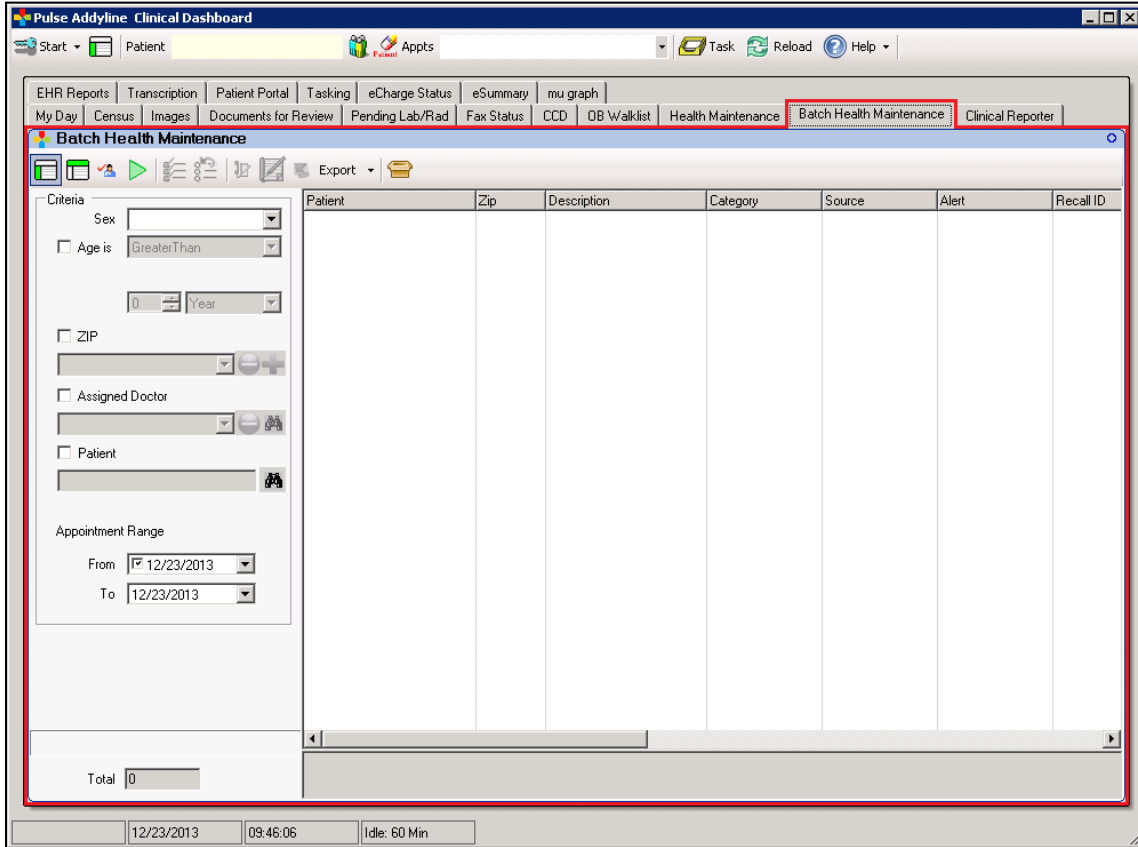


1. Within the *Clinical Dashboard*, click **My Dashboard** under the *Administration* menu.
2. From the *Dashboard Configuration* window, click the  **Add Dashboard Page** icon.
3. On the *Dashboard Page Dialog* window, enter *Batch Health Maintenance* within the *Title* field and click  **Save**.



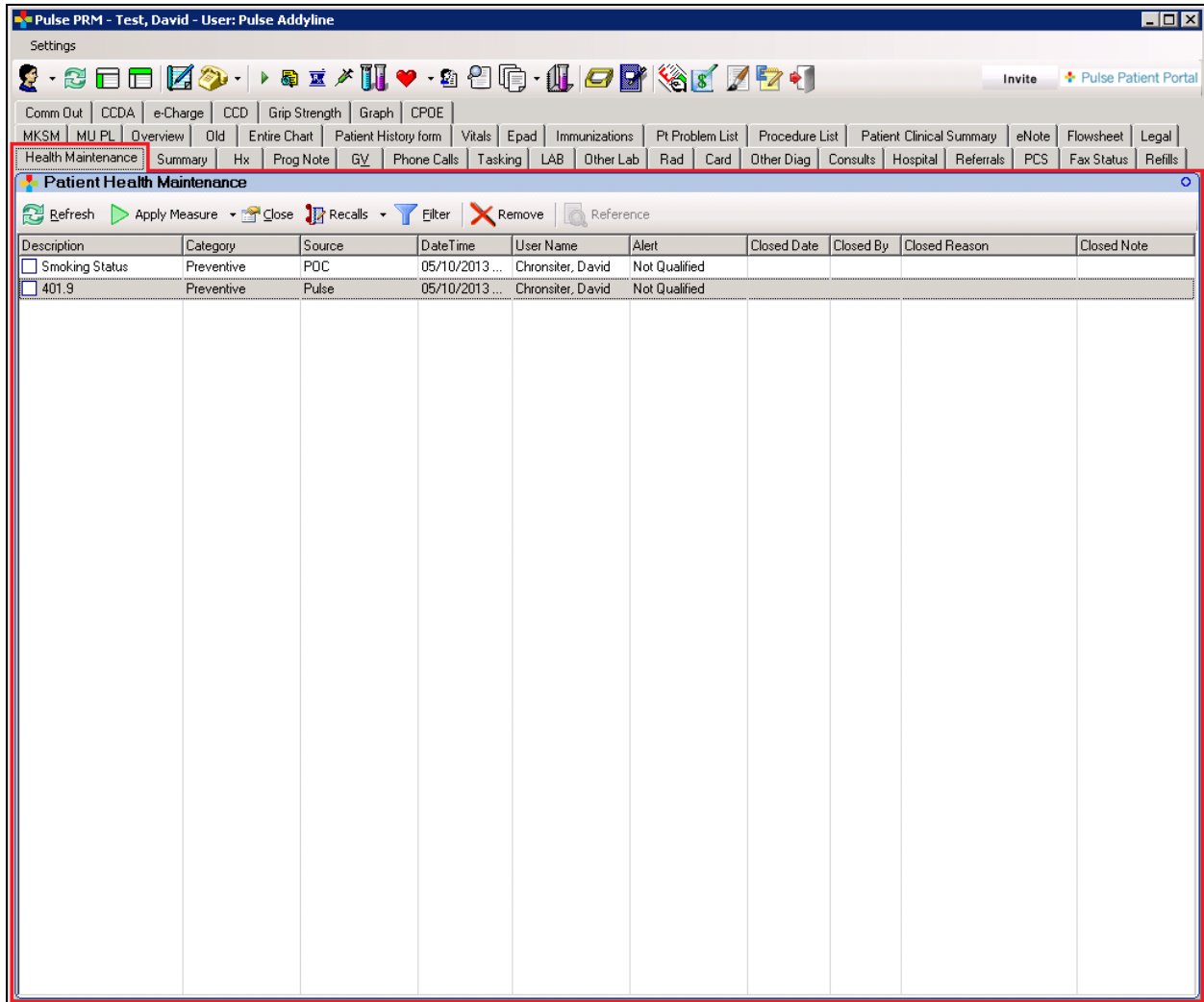
4. Within the *Batch Health Maintenance* page, click the  **Add Panel** icon.
5. The *Dashboard Panel Dialog* window appears

6. Under the *Pulse Controls* section of the window, select *Health Maintenance Controls* → *Batch Health Maintenance*.
7. With *Batch Health Maintenance* selected, choose and enter the name of the panel (as it will display within the *User Dashboard*) within the *Title* field.
8. Currently, there are no configurable settings available for the *Batch Health Maintenance* module. Users simply add the *Batch Health Maintenance* module to the *User Dashboard* through the *Dashboard Configuration*.
9. Click  **Save**
10. Within the *Dashboard Configuration*, click  **Save**.
11. The *Batch Health Maintenance* module is now configured and available within the *User Dashboard*.


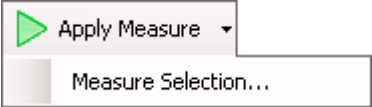


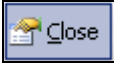
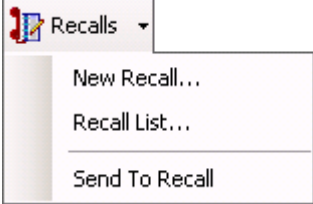





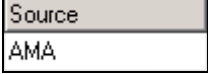
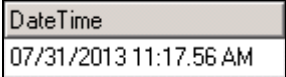
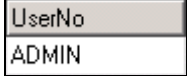
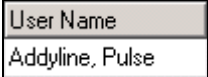
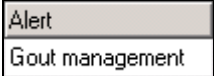
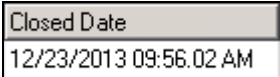
2.4 Patient Health Maintenance module

Patient Health Maintenance is available as a panel within the *Patient Dashboard* and allows the user to run measures against the selected patient's medical information. Users have the ability to select and run defined measures and access referencing materials.



Patient Health Maintenance: Overview of icons, menus and fields

Icon/Menu/Field	Description
	<p>Refresh icon: Enables the user to refresh the <i>Health Maintenance</i> list manually for the selected patient.</p>
	<p>Apply Measure icon: Enables the user to perform the following:</p> <ul style="list-style-type: none"> ○ Apply Measure: Applies a previously run measure ○ Measure Selection: Allows the user to assign a measure to a specific patient and gives the user the ability to edit the parameters at the patient level. Refer to section 2.6 Measure Selection for more information on the <i>Measure Selection</i> function.

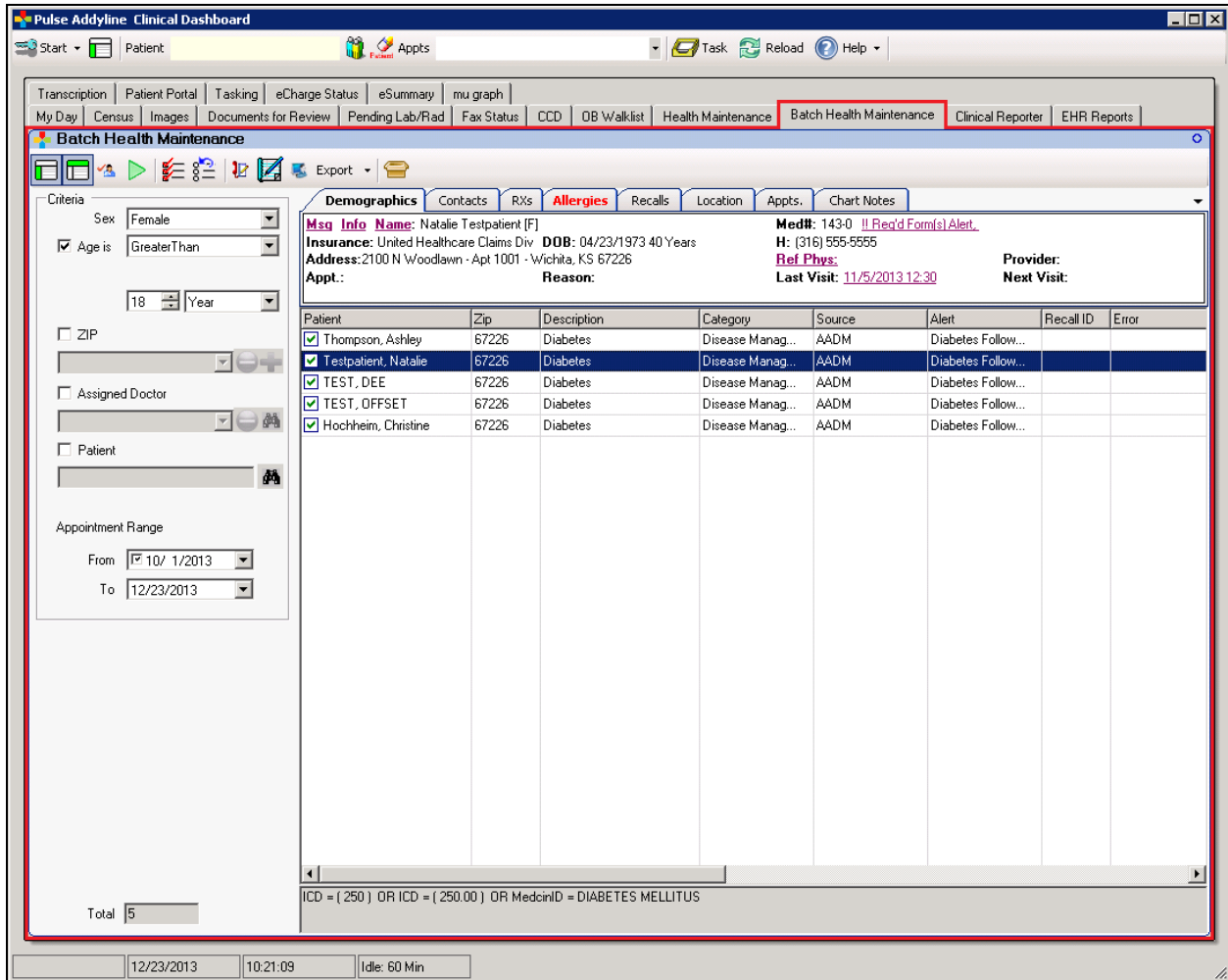
Icon/Menu/Field	Description
	<p>Close icon: Enables the user to close a measure.</p> <p>For example, a patient is due for an annual well woman visit yet states that the visit was completed recently at another provider's office. By clicking the <i>Close</i> icon, the user can close the measure by entering a date of completion.</p>
	<p>Recalls icon: The following options are available within the <i>Recalls</i> dropdown:</p> <ul style="list-style-type: none"> ○ New Recall: Enables the user to create a new recall for an available patient measure ○ Recall List: Enables the user to view recalls created for the selected patient ○ Send to Recall: Enables the user to send the selected patient measure for recall
	<p>Filter icon: Enables the user to filter measures within a patient's measure list. The user has the ability to sort the information by the measure (defined set of rules), the category and/or results (all, abnormal, or normal.)</p>
	<p>Remove icon: Enables the user to delete a measure from the patient's measures list.</p>
	<p>Reference icon: Enables the user to view an external reference document for an applicable health maintenance measure.</p>
	<p>Description column: Displays the assigned description for the measure applied to the patient. Users can select the measure result by checking the corresponding box.</p>
	<p>Category column: Displays the assigned category for the measure applied to the patient.</p>
	<p>Source column: Displays the assigned source for the measure applied to the patient.</p>
	<p>DateTime column: Displays the date and time the measure was applied to the patient.</p>
	<p>UserNo column: Displays the userno of the user applying the measure to the patient.</p>
	<p>User Name column: Displays the name of the user applying the measure to the patient.</p>
	<p>Alert column: Displays the qualified text for the measure applied to the patient.</p>
	<p>Closed Date column: Displays the date and time the applied measure was closed for the patient.</p>

Icon/Menu/Field	Description
<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; background-color: #f0f0f0;">Closed By</div> <div style="border: 1px solid black; padding: 2px;">ADMIN</div> </div>	<p>Close By column: Displays the userno of the user closing the applied measure for the patient.</p>
<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; background-color: #f0f0f0;">Closed Reason</div> <div style="border: 1px solid black; padding: 2px;">AP: Appointment Scheduled</div> </div>	<p>Close Reason column: Displays the closed reason attached to closed patient measure.</p>
<div style="border: 1px solid black; padding: 2px;"> <div style="border: 1px solid black; padding: 2px; background-color: #f0f0f0;">Closed Note</div> <div style="border: 1px solid black; padding: 2px;">Appointment date: 12/30/2013</div> </div>	<p>Close Note column: Displays the free-text note attached to the closed patient measure.</p>

2.5 Batch Health Maintenance module









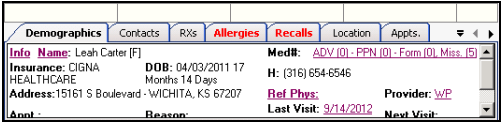

Batch Health Maintenance is available as a panel within the *User Dashboard* that allows the user to run measures against the entire patient population. Users have the ability to select and run measures, allowing them to set recalls for a large group of patients.

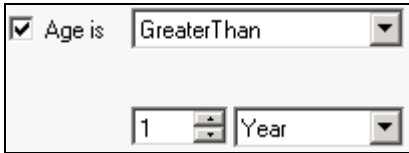



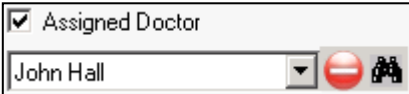


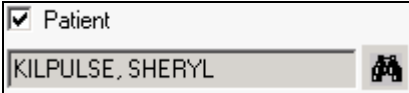

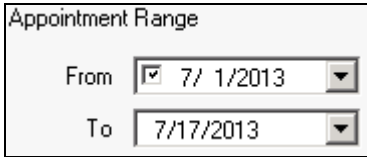


*****WARNING***** It is possible to run a significant amount of data in **Batch Health Maintenance**. The broader the search criteria specified, the longer the program takes to produce results.



Batch Health Maintenance: Overview of icons, menus and fields

Icon/Menu/Field	Description
	Show/Hide Recall Criteria icon: Enables the user to display or hide the <i>Recalls Criteria</i> panel within the <i>Batch Health Maintenance</i> module.
	Patient Information icon: Enables the user to display or hide the <i>Patient Information</i> panel within the <i>Batch Health Maintenance</i> module.
	Count icon: Enables the user to view a total count of the number of patients that would be included in the list if the specified search criteria were applied.


Icon/Menu/Field	Description
	<p>Apply icon: Enables the user to open the <i>Measure Selection</i> window. Through this window, users can select a measure to run against the specified search criteria. A list of patients who return a positive result for the selected measure will display within result list section of the <i>Batch Health Maintenance</i> window.</p>
	<p>Send to Recall icon: Enables the user to send selected patient[s] within the result list section of the <i>Batch Health Maintenance</i> window to <i>Recall</i>.</p>
	<p>Check All icon: Enables the user to select all patients within the result list section of the <i>Batch Health Maintenance</i> window.</p>
	<p>Uncheck All icon: Enables the user to deselect all patients within the result list section of the <i>Batch Health Maintenance</i> window.</p>
	<p>Schedule Appointment icon: Allows the user to access the <i>Schedule Appointment</i> window for the patient associated with the selected measure result. The <i>Schedule Appointment</i> icon is only enabled whenever measure results are present within the <i>Batch Health Maintenance</i> module.</p>
	<p>Patient EHR icon: Allows the user to access the <i>Patient EHR</i> for the patient associated with the selected measure result. The <i>Patient EHR</i> icon is only enabled whenever measure results are present within the <i>Batch Health Maintenance</i> module.</p>
	<p>Export icon: Enables the user to select the <i>Syndromic</i> option to send an ADT A04 (Admit) message to a configured public health reporting agency for any selected patient with an appointment for the current date and a corresponding status of checked in. If the selected patient has an appointment for the current date with a corresponding status of checked out, the <i>Syndromic</i> option sends an ADT A03 (Discharge) message to the configured public health reporting agency.</p>
	<p>Reset to Defaults icon: Enables the user to clear the specified search criteria field and the result list section of the <i>Batch Health Maintenance</i> window.</p>
	<p>Patient Information panel: Displays demographics, contact, Rx, Allergy, recall, location, appointment, and chart note information for the patient associated with the selected measure result. Users can toggle the display of the <i>Patient Information</i> panel through the <i>Patient Information</i> icon.</p>
	<p>Sex field: Enables the user to search for patients by gender. If left blank, the <i>Batch Health Maintenance</i> module will search for male and female records.</p>

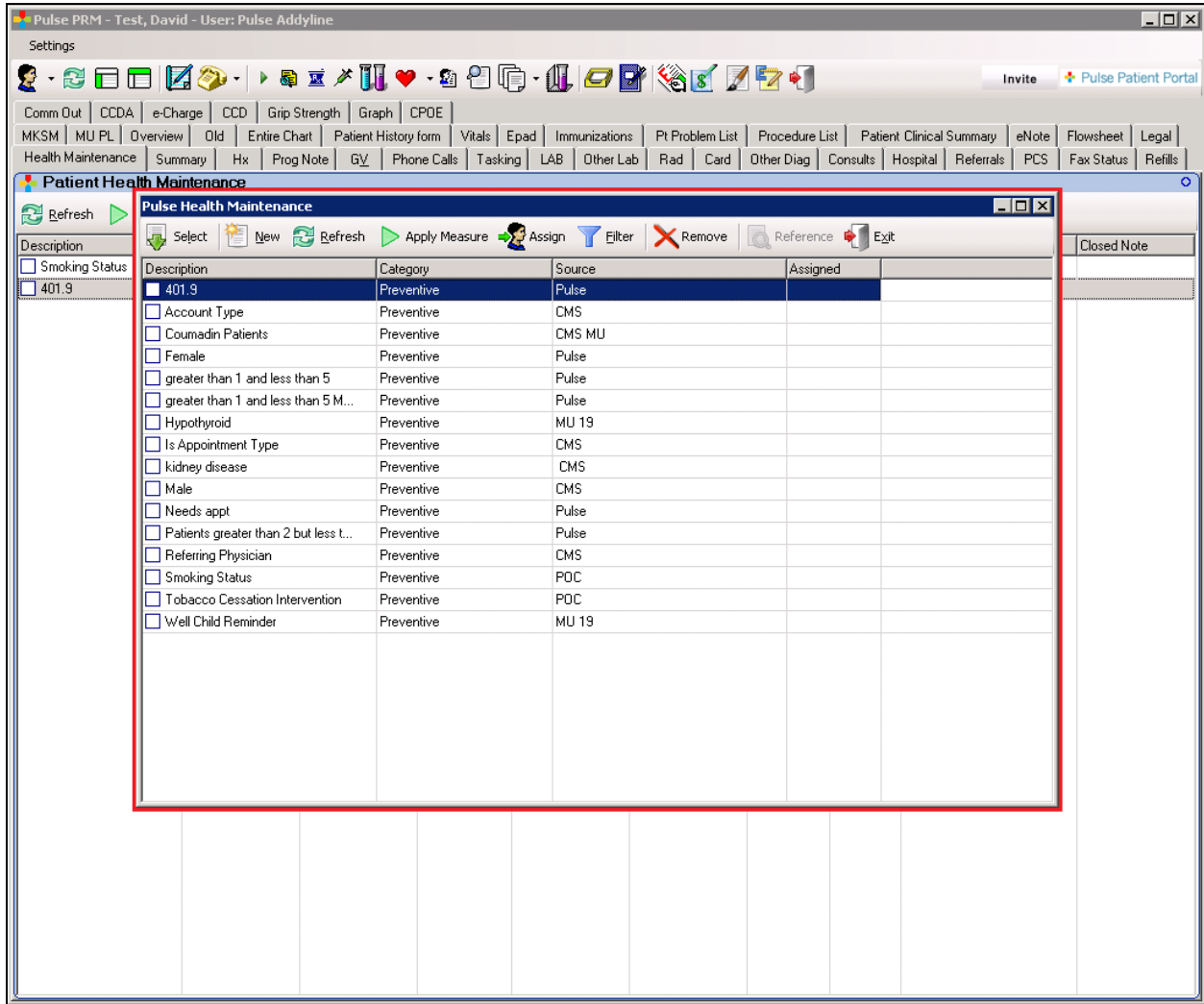
Icon/Menu/Field	Description
	<p>Age is field: Enables the user to search for patients by age range. The following options are available to narrow search results:</p> <ul style="list-style-type: none"> <input type="radio"/> Equal <input type="radio"/> GreaterThan <input type="radio"/> GreaterThanOrEqual <input type="radio"/> LessThan <input type="radio"/> LessThanOrEqual <input type="radio"/> NotEqual <input type="radio"/> Between
	<p>Zip field: Enabled by checking the corresponding box, allows the user to filter measure results by patient zip code. The <i>Zip</i> field allows the user to input and filter results within the <i>Batch Health Maintenance</i> module by multiple zip codes. Users enter all zip codes within <i>Zip</i> field manually and click the  <i>Add</i> icon to apply each entry to the filter criteria. Users can remove applied zip codes from the filter criteria by selecting the desired item from the <i>Zip</i> dropdown field and clicking  <i>Remove</i>.</p>
	<p>Assigned Doctor field: Enables by checking the corresponding box, allows the user to filter measure result by the patient's assigned doctor. The <i>Assigned Doctor</i> field allows the user to input and filter results within the <i>Batch Maintenance</i> module by multiple assigned doctors. Users can locate and select assigned doctors by clicking the  <i>Search</i> icon to access the <i>Provider Lookup</i> window. Assigned doctors selected through the <i>Provided Lookup</i> window are inserted under the <i>Assigned Doctor</i> field. Users can remove a selection under the <i>Assigned Doctor</i> field by selecting the desired doctor from the dropdown field and clicking  <i>Remove</i>.</p>
	<p>Patient field: Enables the user to search results by specific patient. Users can locate and select a patient by clicking the  <i>Search</i> icon to access the <i>Patient Lookup</i> window. The patient selected through the <i>Patient Lookup</i> window is inserted under the <i>Patient</i> field.</p>
	<p>Appointment Range field: Enables the user to search for results by specific appointment date.</p>
	<p>Patient column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the patient name. If applicable, users check the box next to the patient name and click  Send Recall to send the patient item to Recall or click Export to transmit the data as an ADT A03 message to the configured public health reporting agency.</p>

Icon/Menu/Field	Description
<div style="border: 1px solid black; padding: 2px;"> Zip 67207 </div>	Zip column: Displays the patient zip code associated with the corresponding measure result.
<div style="border: 1px solid black; padding: 2px;"> Description Abnormal Pap </div>	Description column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the measure applied to the search criteria.
<div style="border: 1px solid black; padding: 2px;"> Category Pathology </div>	Category column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the associated category for the measure applied to the search criteria.
<div style="border: 1px solid black; padding: 2px;"> Source ACOG </div>	Source column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the originator of the measure applied to the search criteria.
<div style="border: 1px solid black; padding: 2px;"> Alert Follow Up PAP ... </div>	Alert column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays any alert associated within the measure applied to the search criteria.
<div style="border: 1px solid black; padding: 2px;"> RecallID </div>	Recall ID column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays any <i>Recall ID</i> information attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> Error </div>	Error column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays any error information attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> Notify By P </div>	Notify By column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the communication preference for the patient attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> DOB 12/29/1942 </div>	Dob column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the date of birth for the patient attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> Sex M </div>	Sex column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the gender of the patient attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> Race Hispanic </div>	Race column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the race of the patient attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> Ethnicity Hispanic or Latino </div>	Ethnicity column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the ethnicity of the patient attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> Language English </div>	Language column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the preferred language of the patient attached to the corresponding result item.

Icon/Menu/Field	Description
<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px;">Last Visit</div> <div style="padding: 2px;">07/01/2013 1:35 PM</div> </div>	Last Visit column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the last recorded visit for the patient attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px;">Next Visit</div> <div style="padding: 2px;">08/30/2013 9:25 AM</div> </div>	Next Visit column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the next scheduled appointment for the patient attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px;">Diagnosis</div> <div style="padding: 2px;">786.50 - Unspecified Chest Pain</div> </div>	Diagnosis column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the qualifying patient diagnosis attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px;">Medication</div> <div style="padding: 2px;">d00023 - allopurinol</div> </div>	Medication column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the qualifying patient medication attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px;">Allergy</div> <div style="padding: 2px;"></div> </div>	Allergy column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the qualifying patient allergy attached to the corresponding result item.
<div style="border: 1px solid black; padding: 2px;"> <div style="background-color: #cccccc; padding: 2px;">Order</div> <div style="padding: 2px;"></div> </div>	Order column: Located under the result list section of the <i>Batch Health Maintenance</i> module, displays the qualifying order result attached to the corresponding result item.



2.6 Measure Selection window








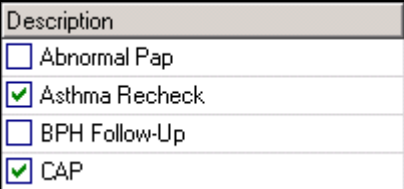
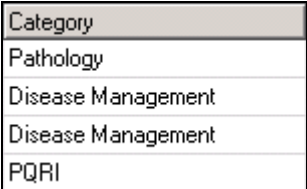
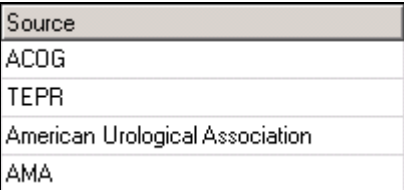
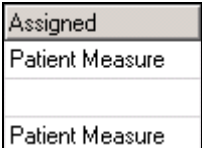
Available from the toolbar sections of the *Patient Health Maintenance* and *Batch Health Maintenance* modules, the  *Apply Measure* icon allows the user to access the *Measure Selection* window. The *Measure Selection* window enables the user to view, create, and apply measures to patients. While the *Measure Selection* window within the *Patient Health Maintenance* module provides functionality similar to the *Measure Selection* window found in the *Batch Health Maintenance* module, the *Patient Health Maintenance* version allows the user to assign a measure to a specific patient and gives the user the ability to edit the parameters at the patient level.




The Measure selection window within the Patient Health Maintenance window

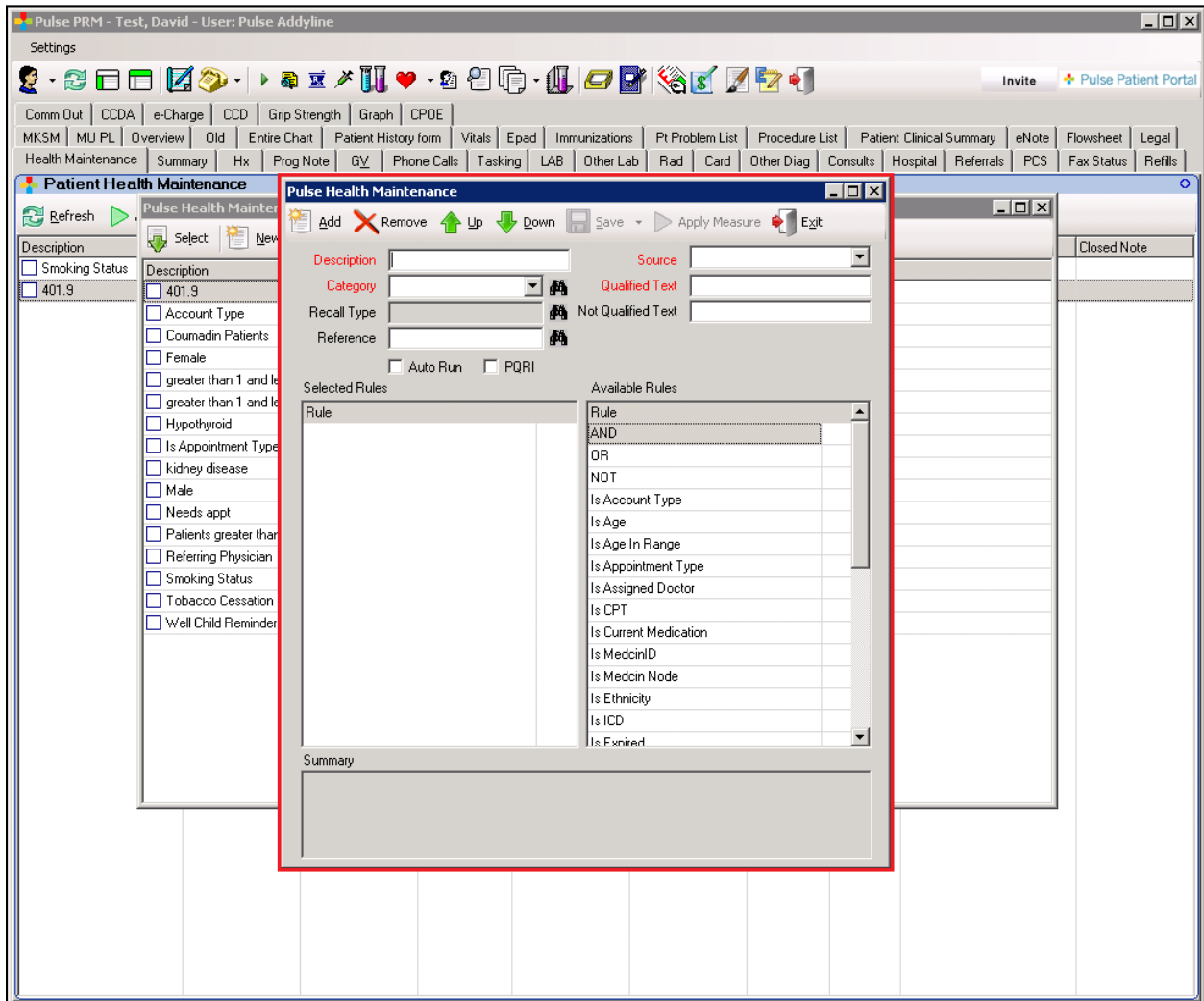
Measure Selection window: Overview of icons, menus and fields

Icon/Menu/Field	Description
	Select icon: Enables the user to select a created measure from the result list and apply the item to the selected patient or database.
	New icon: Enables the user to create a new measure. Refer to section 3.3 Creating a measure within the Patient Health Maintenance module for more information.



Icon/Menu/Field	Description
	<p>Refresh icon: Enables the user to refresh the <i>Health Maintenance – Measures List</i> window manually.</p>
	<p>Apply Measure icon: Enables the user to apply a selected measure to the patient or database of patients for recall purposes. When selected for an individual patient, the user receives a pop-up message confirming the recall action was completed.</p>
	<p>Assign icon: Exclusive to the <i>Patient Health Maintenance</i> module, enables the user to assign a measure to a specific patient.</p>
	<p>Filter icon: Enables the user to access the <i>Pulse Health Maintenance – Filter Criteria</i> window. Through this window, users can filter the displayed results within the <i>Measure Selection</i> window by specific criteria.</p>
	<p>Remove icon: Enables the user to delete a previously created measure.</p>
	<p>Reference icon: When enabled, allows the user to view attached reference material.</p>
	<p>Exit icon: Enables the user to exit the <i>Measure Selection</i> window.</p>
	<p>Description column: Located within the result list, displays the name for a measure.</p>
	<p>Category column: Located within the result list, displays the associated category for a measure.</p>
	<p>Source column: Located within the result list, displays the name of the originator for a measure.</p>
	<p>Assigned column: Exclusive to the <i>Patient Health Maintenance</i> module, displays appropriate assignment information for a measure item.</p>







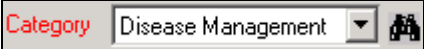

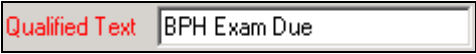
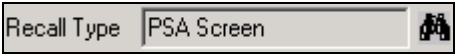

2.7 New Measure window

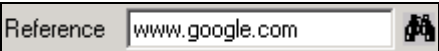
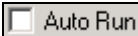

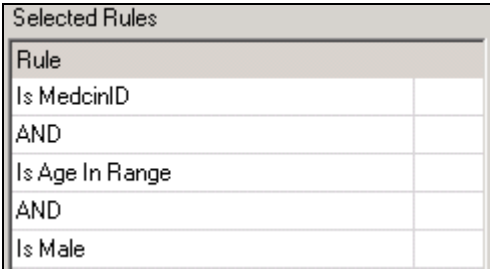
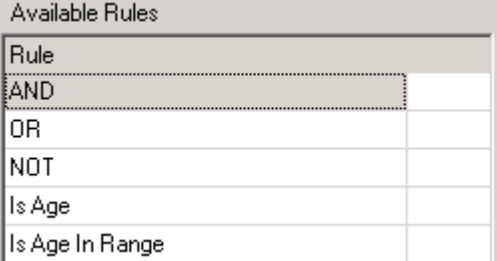
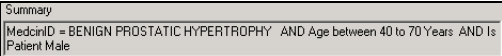
Accessible through the  *New* icon within the *Measure Selection* window, the *New Measure* window has been specifically designed to create new measures for data mining.



New Measure window: Overview of icons, menus and fields

Icon/Menu/Field	Description
	<p>Add icon: Enables the user to add a rule from the <i>Available Rules</i> column to the <i>Selected Rules</i> column as a user creates a new measure by selecting the <i>Add</i> rule icon or by double-clicking on the rule.</p> <p>NOTE: Information added to the <i>Selected Rules</i> column will remain in the <i>Available Rules</i> column. This gives the user the ability to use the same rule multiple times within a measure.</p>
	<p>Remove icon: Enables the user to remove a previous rule from the <i>Selected Rules</i> column.</p>

Icon/Menu/Field	Description
	<p>Move Rule Up icon: Enables the user to move the selected rule up in position within the list of selected rules.</p>
	<p>Move Rule Down icon: Enables the user to move the selected rule down in position within the list of selected rules.</p>
	<p>Save icon: Enables the user to save the created/modified measure and close the window.</p>
	<p>Apply Measure icon: Exclusive to the <i>Patient Health Maintenance</i> module, enables the user to run the newly configured measure against the patient.</p>
	<p>Description field: The <i>Description</i> field is where the user enters the name of the measure being created. All entries in the <i>Description</i> field display in the list of measures within <i>Pulse Health Maintenance</i> (under the <i>Descriptions</i> column.) The user should be as descriptive as possible when creating a name.</p>
	<p>Source field: The <i>Source</i> field is where the information for the rules the user applies originates (e.g., the CDC or AMA.)</p>
	<p>Category field: The <i>Category</i> field enables the user to organize the measures run on a patient (e.g., <i>Preventative</i>, <i>Disease Management</i>, etc.) By clicking the  lookup icon within the <i>Category</i> field, user can select or create a category to apply to a measure.</p>
	<p>Qualified Text field: The <i>Qualified Text</i> field is text that shows up as the result of running the measure if the patient matches the measure. Entries must be descriptive as possible as this will inform the user on what rules the patient fits within (e.g., patient is not a woman over 40.)</p>
	<p>Recall Type field: The <i>Recall Type</i> field gives the user the ability to attach a previously created <i>Recall Type</i> to the measure. This creates a link within the system that automatically transfers the patient information into the recall system when the patient fits within a run measure.</p> <p>For example, run a measure for a well women visit. If the patient fits the criteria created within the measure, the measure can then be applied and the patient's information transfers into the recall system to alert a staff member to contact the patient to schedule an appointment.</p>
	<p>Not Qualified Text field: The <i>Not Qualified Text</i> field is the text that shows up as the result of running the measure if the patient does not match the measure. Be descriptive as possible as this informs the user on what rules the patient fits within (e.g., patient is not a woman over 40.)</p>

Icon/Menu/Field	Description
	<p>Reference field: The <i>Reference</i> field gives the user the ability to attach a specific file (related to the source) to the measure being created. In order to attach reference material, users must first save the file.</p>
	<p>Auto Run box: When checked, enables users to specify if a pop-up warning appears whenever a patient matching the applied measure criteria is accessed within the Patient Dashboard. Refer to section 3.8 – Overview of the Measure Alert window for more information.</p>
	<p>PQRI box: When checked, designates the new measure for use within the <i>Pulse PQRI Registry</i> function.</p>
	<p>Selected Rules column: Contains all the information selected during the process of creating a new measure.</p> <p>NOTE: If a user adds a new <i>Rule</i> without placing an appending operator (AND/OR) in between the rules the program will automatically add AND. To edit a measure in the <i>Measure Selection</i> window, users must double-click the desired rule. This will open the <i>Rules</i> screen.</p>
	<p>Available Rules column: Contains all the rules logic that can be selected during the process of creating a new measure.</p>
	<p>Summary field: The <i>Summary</i> field shows the user how the criterion being created reads (e.g., shown states the patient is female or male between the ages of 1 and 17 years and has not had a CPT code billed for a well child visit within the last year. The user will be required to select the rule again and open the dialog box to view the restriction information.)</p>



2.7.1 Understanding Rules within a Measure

Rules are the heart of the measure. The user can add as many rules as needed to create a measure. Rules are in categories according to where the user wants to look for the data and can be appended to each other using AND/OR and can be reversed using NOT. Rules can also be grouped together using parenthesis to keep the order of logic clear and to keep the measure pulling the correct data.

- **Is Age**
 - User can use this to filter patient(s) by one age factor
 - Rule can be run for a variety of operators including equal, greater than and less than
 - User can select any age
 - User can select age by years or months
- **Is Age Range**
 - User can use this to filter patient(s) by an age range factor
 - User can select any age
 - User can select age by years or months
- **Is CPT** (PulsePro Billing Data)
 - Use the lookup to find and search CPT codes
 - User can set an age or age range OR the user can set a time range
 - User can set a frequency or number of times a CPT code has been billed by entering a number in the quantity field
- **Is ICD** (PulsePro Billing Data)
 - User can use this to find and search for ICD codes
 - User can set an age or age range OR the user can set a time range
 - User can set a frequency or number of times an ICD code has been billed by entering a number in the quantity field
- **Is MedcinID** (PulseEHR Clinical Chart Data)
 - User can use the lookup to find a specific MedcinID
 - User can set an age or age range OR the user can set a time range
 - User can set a frequency of how often the findings occur by entering a number in the quantity field
- **Is MedcinNode** (PulseEHR Clinical Chart Data)
 - User can use the lookup to find a specific MedcinID and ALL FINDINGS THAT ARE A PART OF a MedcinID
 - User can set an age or age range OR the user can set a time range
 - User can set a frequency of how the findings occur by entering a number in the quantity field.
- **Is Order Result** – Allows for the filtering of patients by specific Order Result. Users can double-click the *Is Order Result* rule and configure the rule by specific order, result, age range, value, and quantity.
- **Is Race** – Allows for the filtering of patients by race. Users can double-click the *Is Race* rule to select the desired race from a list of available options. Options within the *Is Race* rule are configurable through the Master Codes table within PulsePro under the Race Code Type.
- **Is Ethnicity** – Allows for the filtering of patients by ethnicity. Users can double-click the *Is Ethnicity* rule to select the desired ethnicity from available options. Options within the *Is Ethnicity* rule are configurable through the Master Codes table within PulsePro under the Ethnicity Code Type.
- **Is Language** – Allows for the filtering of patient by language. Users can double-click the *Is Language* rule to select the desired language from available option. Options within the *Is Language* rule are configurable through the Master Codes table within PulsePro under the Language Code Type.
- **Is Female** – is a direct identifier with no additional options to set
- **Is Male** – is a direct identifier with no additional options to set
- **Is Current Medication** – Allows for the filtering of patients by their current medications. When selected, users can search and select the current medications by specific drug name through a dedicated pop-up window.

- **Is Medication Allergy** – Allows for the filtering of patients by medication allergies. When selected, users can search and select medication allergies by specific drug name through a dedicated pop-up window.
- **Is Notify By** – Allows for the filtering of patients by specified communication preference (as configured through the *Demographics* tab of the *Register Patient* module.) When selected, users can select the desired communication preference through a dedicated pop-up window.
- **Is Problem List** – Allows for the filtering of patients by ICD-9 codes assigned to problem lists. When selected, users can search and select the desired ICD-9 codes through a dedicated pop-up window.
NOTE: The “Is Problem List” rule will not retrieve ICD-9 code data from imported charges.
- **Is Zip Code** – Allows for the filtering of patients by zip code. When selected, users can specify the desired zip code through a dedicated pop-up window.
- **Is Payer Source** – user can add a payer source (self-pay, worker’s compensation, Medicare, Medicaid, etc.)
- **Is Recall** – Allows users to incorporate recall types with time periods (via Day, Week, Month, or Year increments) to a *Health Maintenance* measure. For example, a user could build a measure to incorporate anyone with an open recall within the next week.
- **Is Appointment Type** – Allows for the filtering of patients by appointment type. When selected, users can specify the appointment procedure and date range for the rule through a dedicated pop-up window.
- **Is Assigned Doctor** – Allows for the filtering of patients by assigned doctor. When selected, users can specify the assigned doctor for the rule through a dedicated pop-up window.
- **Is Account Type** – Allows for the filtering of patients by account type. When selected, users can specify the account type for the rule through a dedicated pop-up window.
- **Is Referring Physician** – Allows for the filtering of patients by referring physician. When selected, users can specify the referring physician for the rule through a dedicated pop-up window.
- **Is Expired** – Allows for the filtering of patients by deceased status.

2.7.2 Understanding Rule Logic

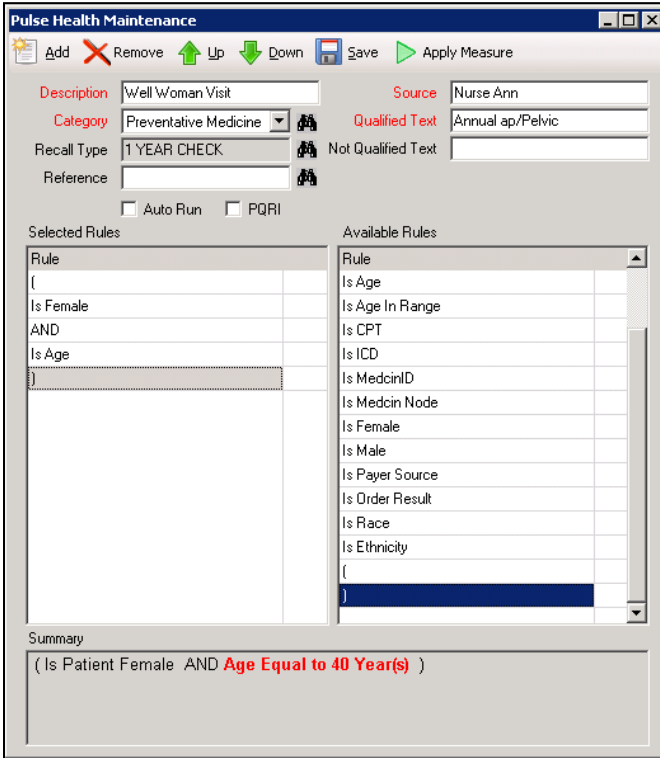
The usage of parenthesis is very important to the functioning of the measure. Use of parenthesis keeps the logical groupings together. If there is no parenthesis in the Rules list, then the rules will be applied by SQL in the default order of operations.

The SQL default order of operations is:

- NOT
- AND
- OR

Let's review some examples:

Example 1 – Woman over 40 Note: In this instance, parenthesis is not required. However, it is always best to use them to clarify the type of data the user is trying to locate.



The screenshot shows the 'Pulse Health Maintenance' window with the following configuration:

- Description:** Well Woman Visit
- Category:** Preventative Medicine
- Recall Type:** 1 YEAR CHECK
- Source:** Nurse Ann
- Qualified Text:** Annual ap/Pelvic
- Not Qualified Text:** (empty)
- Selected Rules:**
 - (
 - Is Female
 - AND
 - Is Age
 -)
- Available Rules:**
 - Is Age
 - Is Age In Range
 - Is CPT
 - Is ICD
 - Is MedicinID
 - Is Medicin Node
 - Is Female
 - Is Male
 - Is Payer Source
 - Is Order Result
 - Is Race
 - Is Ethnicity
 - (
 -)
- Summary:** (Is Patient Female AND Age Equal to 40 Year(s))

Example 2 – Add to example #1 the following – women between 30 and 40 who have had a CPT PAP in the last year.

NOTE: It is especially important to use parenthesis when OR is involved.

Pulse Health Maintenance

Add Remove Up Down Save Apply Measure

Description: Well Woman Visit Source: Nurse Ann
 Category: Preventative Medicine Qualified Text: Annual ap/Pelvic
 Recall Type: 1 YEAR CHECK Not Qualified Text:
 Reference:
 Auto Run PQRI

Selected Rules	Available Rules
(Is Age
Is Female	Is Age In Range
AND	Is CPT
Is Age	Is ICD
)	Is MedcinD
OR	Is Medcin Node
(Is Female
Is Female	Is Male
AND	Is Payer Source
Is Age In Range	Is Order Result
AND	Is Race
Is CPT	Is Ethnicity
)	(
)

Summary
 (Is Patient Female AND Age Equal to 40 Year(s)) OR (Is Patient Female AND Age between 30 to 40 Years AND CPT = 29365)

Example 3 – Change example #2 to women between 30 and 40 who have NOT had CPT PAP in the last year.

Pulse Health Maintenance

Add Remove Up Down Save Apply Measure

Description: Well Woman Visit Source: Nurse Ann
 Category: Preventative Medicine Qualified Text: Annual ap/Pelvic
 Recall Type: 1 YEAR CHECK Not Qualified Text:
 Reference:
 Auto Run PQRI

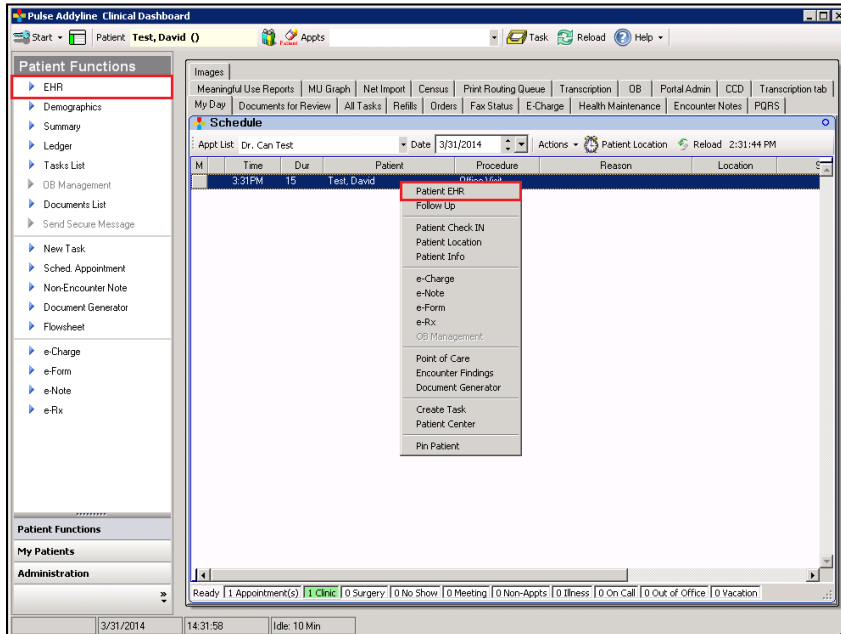
Selected Rules	Available Rules
(AND
Is Female	OR
AND	NOT
Is Age	Is Age
)	Is Age In Range
OR	Is CPT
(Is ICD
Is Female	Is MedcinD
AND	Is Medcin Node
Is Age In Range	Is Female
AND	Is Male
NOT	Is Payer Source
Is CPT	Is Order Result
)	Is Race
	Is Ethnicity




Summary
 (Is Patient Female AND Age Equal to 40 Year(s)) OR (Is Patient Female AND Age between 30 to 40 Years AND NOT CPT = 29365)

3. Workflow

3.1 Accessing the Patient Health Maintenance module

Perform the following to access and utilize the *Patient Health Maintenance* module:

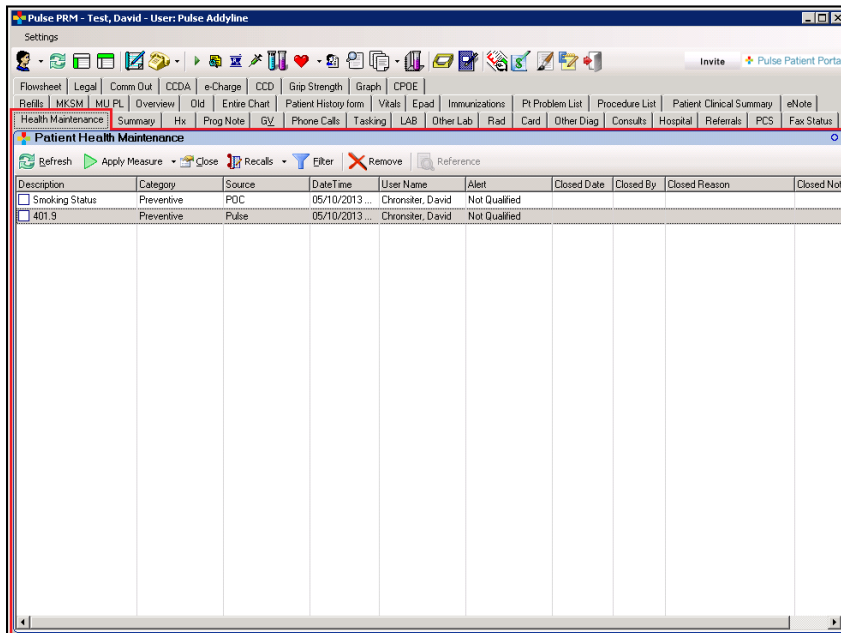


1. On the *User Dashboard*, click the  **Select Patient** icon to access the *Patient Lookup* window
2. Enter desired patient information in the fields provided and click  **Filter**.
3. Highlight the appropriate patient from the results provided and click  **Select**.
4. Within the *Modules* panel, click **EHR** under the *Patient Functions* menu.

-Or-

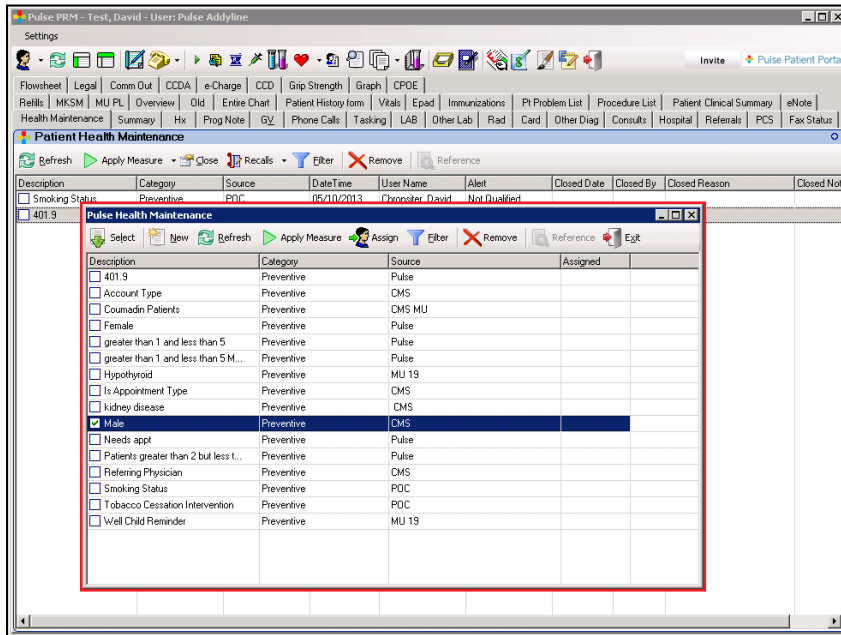
From the *Appointment List*, right-click on the desired patient appointment and select *Patient EHR*.

5. On the *Patient EHR*, locate the *Patient Health Maintenance* tab.
6. Click the **Patient Health Maintenance** tab.
7. The configured *Patient Health Maintenance* module displays.







3.2 Selecting a measure within the Patient Health Maintenance module

Perform the following to select a measure within the *Patient Health Maintenance* module:



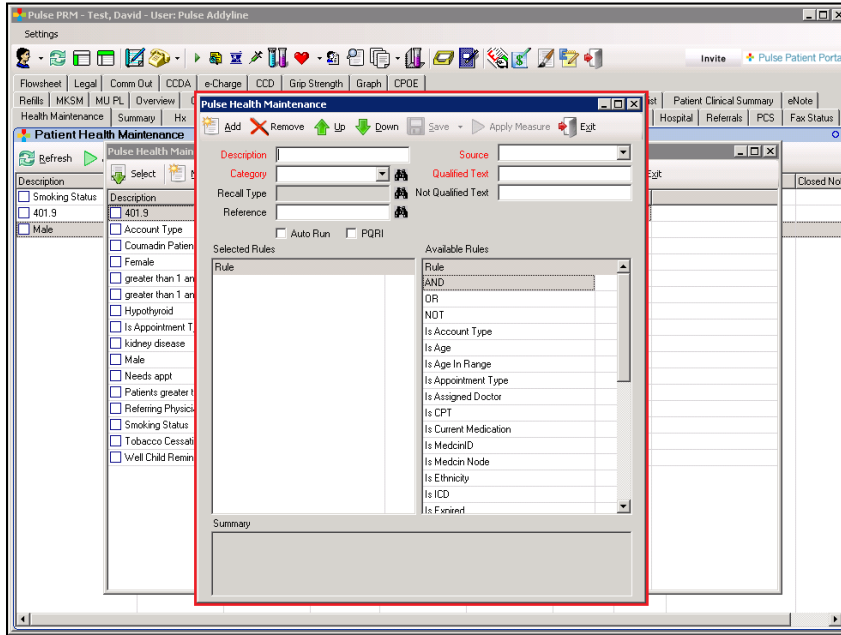
Selecting a Measure

1. Click the  **Apply Measure** toolbar icon and select *Measure Selection* from the toolbar section of the *Patient Health Maintenance* module
2. The *Patient Health Maintenance – Measure List* displays
3. From the *Measure List* select the desired measure
4. To apply the measure to the patient, click 
5. To apply the measure for recall purposes, click 
6. To assign the measure to patient, click  **Assign**
7. The selected measure displays in the result section of the *Patient Health Maintenance* module.



NOTE: The aforementioned procedure can also be used to select a measure within the *Batch Health Maintenance* module.

3.3 Creating a measure within the Patient Health Maintenance module




Perform the following to select a measure within the *Patient Health Maintenance* module:

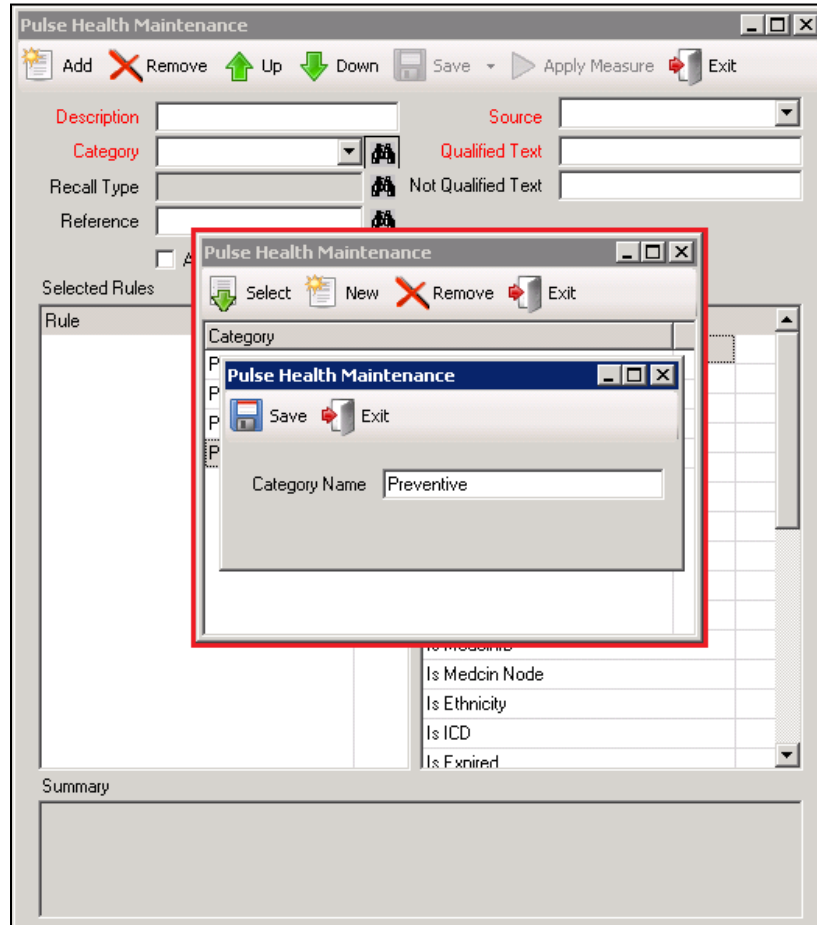


Creating a Measure

1. Within the *Patient Health Maintenance* module, click  **Apply Measure** and select **Measure Selection**.
2. The *Patient Health Maintenance – Measure List* window displays
3. Click the  **New** toolbar icon
4. The *Pulse Health Maintenance – New Measure* window appears.
5. Enter the desired measure information within the provided fields.

NOTE: Fields in **red text** are required

6. Enter the name of the measure within the *Description* field
7. If applicable, click the  **Lookup** icon within the *Category* field to access the *Category Selection* window where users can select/create/edit category selections.
 - a. From the *Category Selection* window, click the  **New** icon
 - b. Within the pop-up window, enter the name of the new *Category* selection
 - c. Click  **Save**
 - d. The *Category* selection item appears within the *Category Selection* window



Pulse Health Maintenance

Type	Urgent	Appoint Type	Warn within	Code	Form No	Recall After	Notifications	Allow Multiple	Recall Per...
Amiodarone Level Due			0	AL	0	6	1		0
Annual Exam			30	AN	0	12	1		0
Abnormal PAP	X		0	AP	0	0	1	X	0
Asthma Recheck			0	AS	0	0	1		0
Blood Pressure Check		BP: Blood Pressure Check	0	BP	0	3	1		0
Meets PQRI Eligibility...			0	CA	0	0	1		0
Echocardiogram			0	CE	0	12	1		0
Colonoscopy		COLON: Colonoscopy	0	CO	19: RECALL_LETTER	12	2		0
DM - Due for Hem A1C		LC001453: Hemoglobin (h...	0	DM	0	6	1		0
Meets PQRI Eligibility ...			0	ED	0	0	1		0
Immunization Recall			0	IM	0	0	1		0
Meets PQRI Eligibility ...			0	IV	0	0	1		0
Lipid Panel		LC303756: Lipid Panel	0	LP	0	6	1		0
Mammogram Due			0	MM	0	0	1		0

Code: BP Description: Blood Pressure Check

Relate to Appoint Type/Proc: BP: Blood Pressure Check

Warn within: 0 Days of schedules appointment.

Recall after: 3 Month(s) # of notifications: 1 Urgent

Recall period: 0 Day(s)

Form No: 0

Allow multiple recalls with this type (not recommended).

Pulse Health Maintenance

Type	Urgent	Appoint Type	Warn within	Code	Form No	Recall After	Notifications	Allow Multiple	Rec...
Amiodarone Level Due			0	AL	0	6	1		0
Annual Exam			30	AN	0	12	1		0
Abnormal PAP	X		0	AP	0	0	1	X	0
Asthma Recheck			0	AS	0	0	1		0
Blood Pressure Check		BP: Blood Pressure Check	0	BP	0	3	1		0
Meets PQRI Eligibility...			0	CA	0	0	1		0
Echocardiogram			0	CE	0	12	1		0
Colonoscopy		COLON: Colonoscopy	0	CO	19: RECALL_LETTER	12	2		0
DM - Due for Hem A1C		LC001453: Hemoglobin (h...	0	DM	0	6	1		0
Meets PQRI Eligibility ...			0	ED	0	0	1		0
Immunization Recall			0	IM	0	0	1		0
Meets PQRI Eligibility ...			0	IV	0	0	1		0
Lipid Panel		LC303756: Lipid Panel	0	LP	0	6	1		0
Mammogram Due			0	MM	0	0	1		0

Code: TE Description: Test

Relate to Appoint Type/Proc:

Warn within: 0 Days of schedules appointment.

Recall after: 0 Month(s) # of notifications: 1 Urgent

Recall period: 0 Day(s)

Form No:

Allow multiple recalls with this type (not recommended).

Pulse Health Maintenance

Type	Urgent	Appoint Type	Warn within	Code	Form No	Recall After	Notifications	Allow Multiple	Rec...
Amiodarone Level Due			0	AL	0	6	1		0
Annual Exam			30	AN	0	12	1		0
Abnormal PAP	X		0	AP	0	0	1	X	0
Asthma Recheck			0	AS	0	0	1		0
Blood Pressure Check		BP: Blood Pressure Check	0	BP	0	3	1		0
Meets PQRI Eligibility...			0	CA	0	0	1		0
Echocardiogram			0	CE	0	12	1		0
Colonoscopy		COLON: Colonoscopy	0	CO	19: RECALL_LETTER	12	2		0
DM - Due for Hem A1C		LC001453: Hemoglobin (h...	0	DM	0	6	1		0
Meets PQRI Eligibility ...			0	ED	0	0	1		0
Immunization Recall			0	IM	0	0	1		0
Meets PQRI Eligibility ...			0	IV	0	0	1		0
Lipid Panel		LC303756: Lipid Panel	0	LP	0	6	1		0
Mammogram Due			0	MM	0	0	1		0

Code: TE Description: Test

Relate to Appoint Type/Proc: APPT: Appointment





Warn within: BP: Blood Pressure Check
BX: Biopsy


Recall after: COLON: Colonoscopy
CON45MIN: Consult 45 Min
CON60MIN: Consult 60 Min

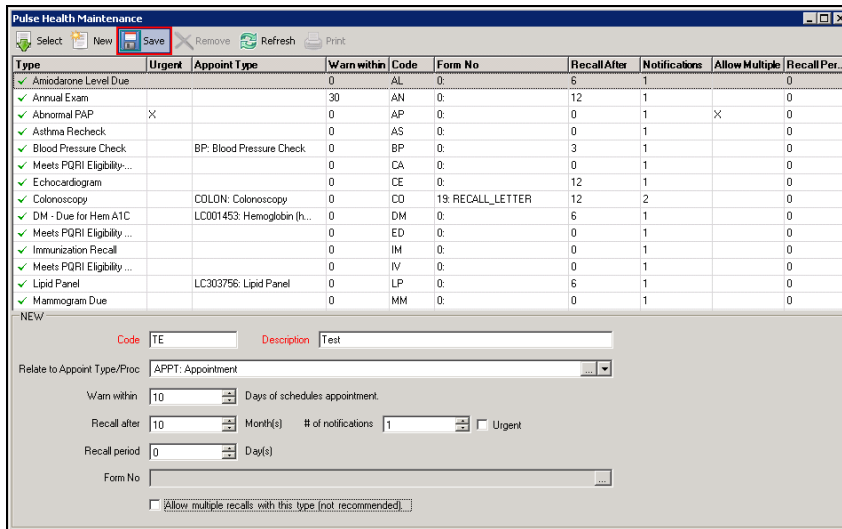
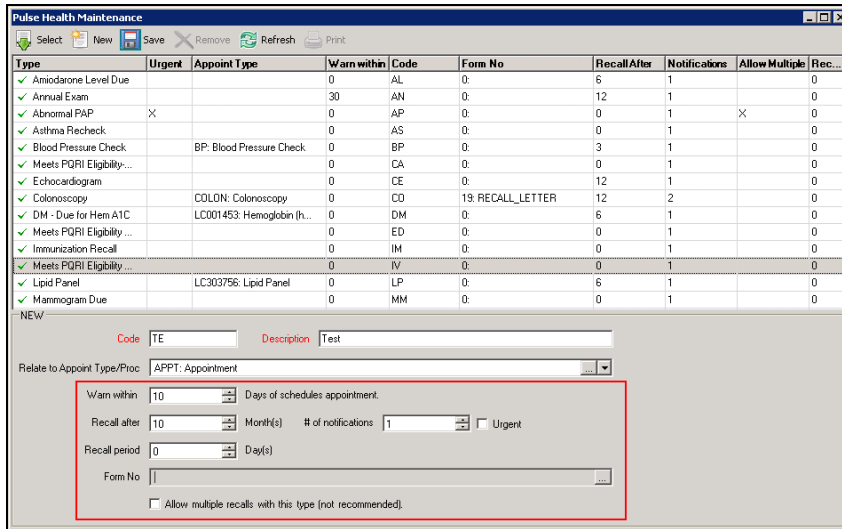
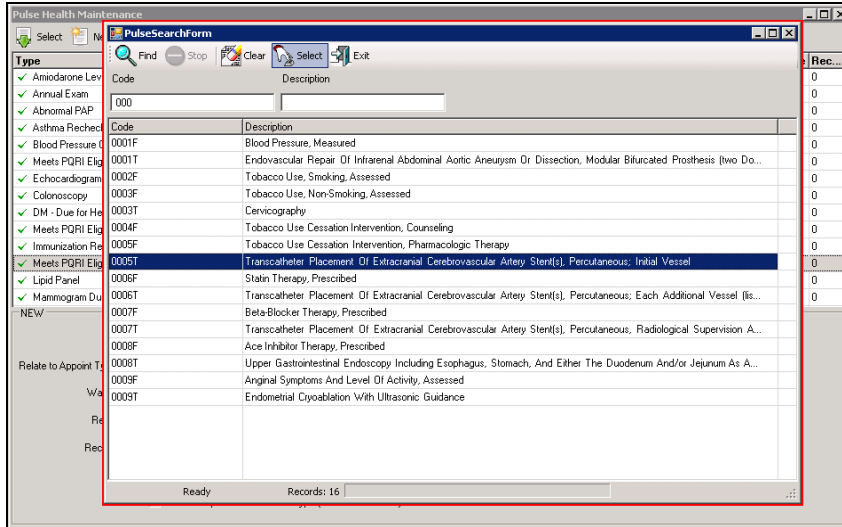
Recall period: CONSULT: Consultation
CR: Cast Removal

Form No:

Allow multiple recalls with this type (not recommended).

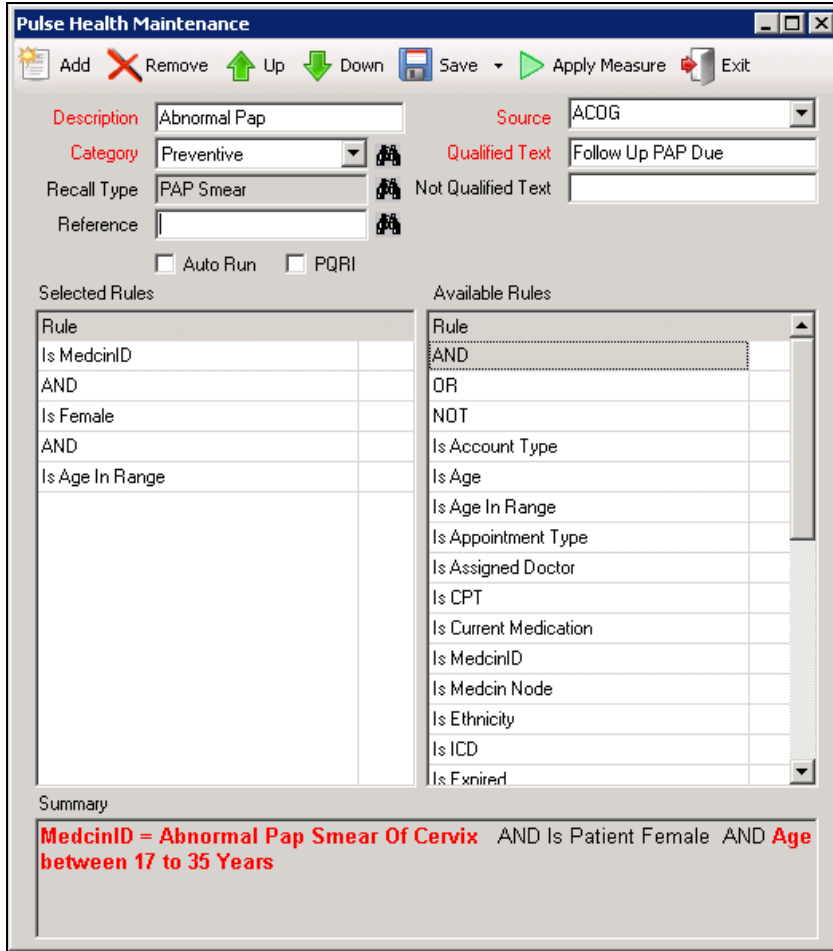
- e. Highlight the item and click  **Select**
8. If applicable, click the  **Lookup** icon within the *Recall Type* field to access the *Recall Type* window, where users can select/create/edit recall types
 - a. From the *Recall Type* window, highlight the desired recall type from the result list portion of the window and click  **Select**.
 - b. To create a new recall type, click  **New**.
 - c. Enter the desired recall type information in the provided fields.
 - d. Under the *Code* field, enter the two-character identifier for the recall type
 - e. Under the *Description* field, enter the name of the recall type. All entries in the *Description* field display in the list of measures under the *Type* column. The user should be as descriptive as possible when creating a name.

NOTE: Fields in **red text** are required fields
 - f. Within the *Relate to Appoint Type/Proc* field, click the  icon to the desired item.



- g. Within the *Relate to Appointment Type/Proc* field, click the icon to the desired item.
- h. If desired, click the icon create a new selection under the *Release to Appointment Type/Proc* field.
 - i. The *Pulse Search Form* window displays
 - ii. From the provided fields, enter the desired criteria and click **Find**
 - iii. Select the desired item from the result list and click **Select**
- i. If applicable, enter the number of days before warning is generated for an appointment within the *Warn within Days of Schedule Appointment* field.
- j. If applicable, enter the number of months before the item is recalled within the *Recall after* field.
- k. If applicable, enter the number of notifications generated within the *# of notifications* field.

NOTE: Users can check the *Urgent* box to label the notifications as urgent
- l. If applicable, enter the length of the recall period (in days) within the *Recall Period* field.
- m. Click **Save** to add the item to the *Recall Type* selection list.



Pulse Health Maintenance

Add Remove Up Down Save Apply Measure Exit

Description: Abnormal Pap Source: ACOG

Category: Preventive Qualified Text: Follow Up PAP Due

Recall Type: PAP Smear Not Qualified Text:

Reference:

Auto Run PQRI

Selected Rules	Available Rules
Is MedcinID	AND
AND	OR
Is Female	NOT
AND	Is Account Type
Is Age In Range	Is Age
	Is Age In Range
	Is Appointment Type
	Is Assigned Doctor
	Is CPT
	Is Current Medication
	Is MedcinID
	Is Medcin Node
	Is Ethnicity
	Is ICD
	Is Expired

Summary

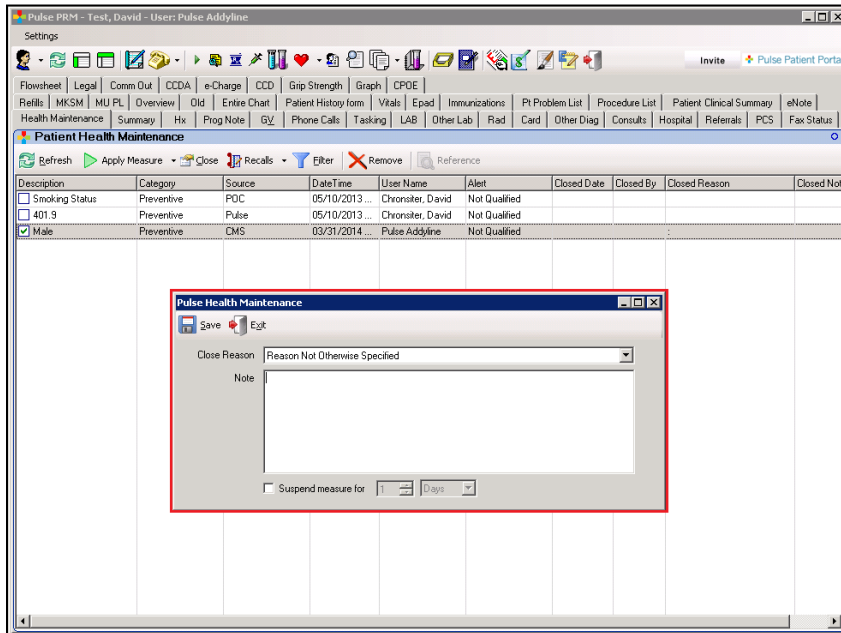
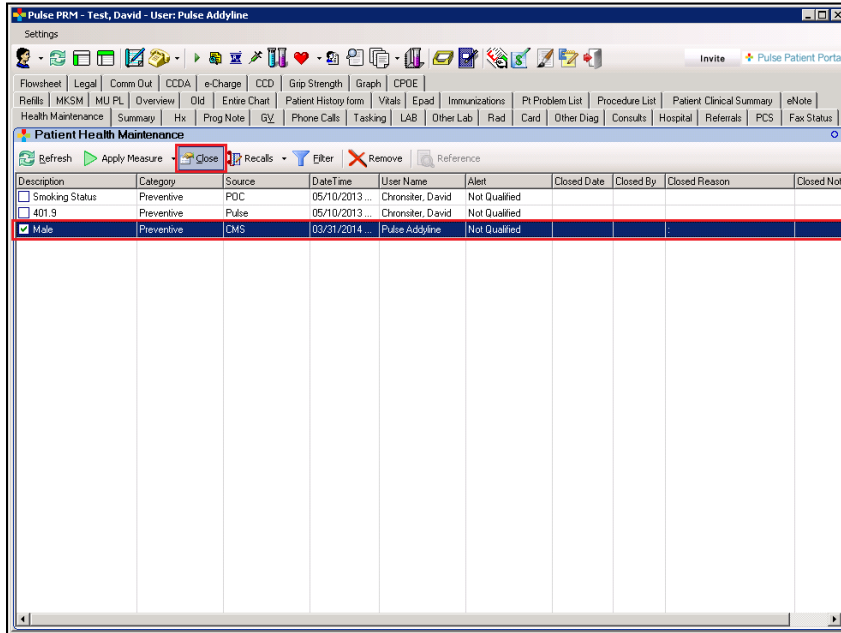
MedcinID = Abnormal Pap Smear Of Cervix AND Is Patient Female AND Age between 17 to 35 Years



NOTE: The aforementioned procedure can be used to create a measure within the *Batch Health Maintenance* module.

9. If applicable, attach an external document within the *Reference* field. Users can enter a website address within the *Reference* field or click the **Search** icon to attach document to the measure.
10. Enter the name of the staff member responsible for the measure within the *Source* field
11. Enter the text used to match the patient to the measure within the *Qualified Text* field.
12. If applicable, enter the text not used to match to the measure within the *Note Qualified Text* field.
13. If applicable, check the *Auto Run* box specify if a pop-up warning appears whenever a patient matching the specified measure criteria is accessed through the Patient Dashboard.
14. Under the *Available Rules* section, select the rules for the measure. Refer to sections [2.7.1 Understanding Rules within a Measure](#) and [2.7.2 Understanding Rule Logic](#) for more information on configuring rules for a measure.
15. Once complete, click the **Add** icon to add the new measure to the *Measure List*.

3.4 Closing a measure within the Patient Health Maintenance module

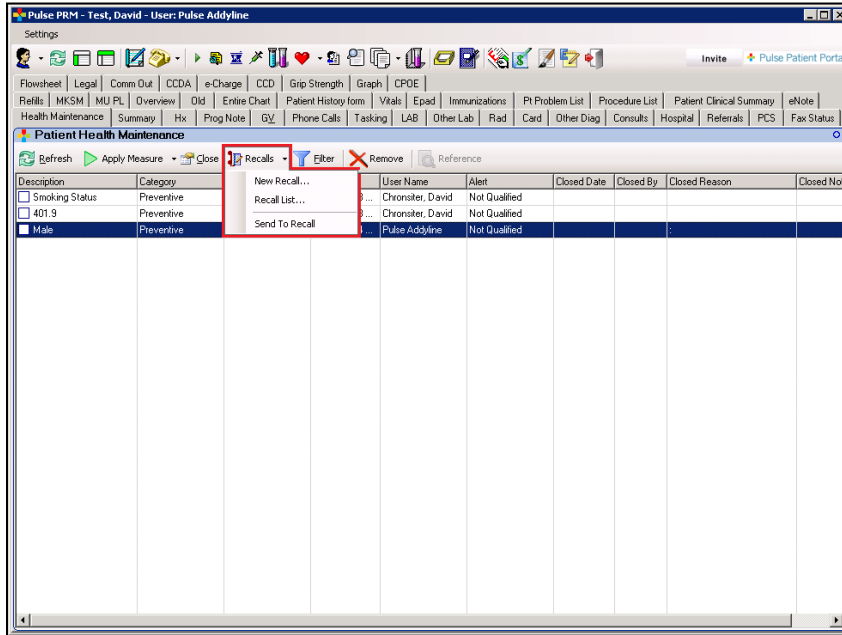
Perform the following to select a measure within the *Patient Health Maintenance* module:



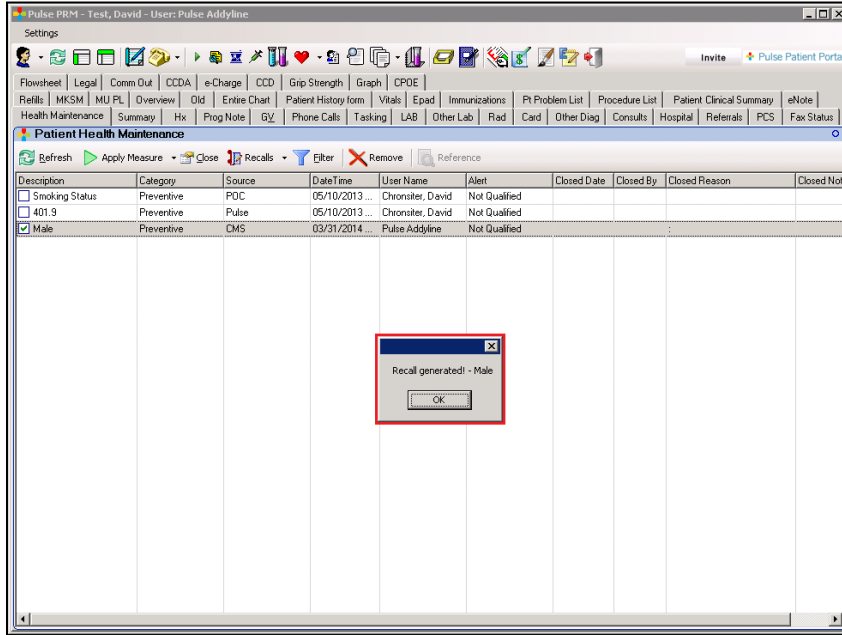
1. Within the *Patient Health Maintenance* module, check the box next to the desired measure under the Description column.
2. Click the  **Close** icon.
3. The *Override Measure* window displays
4. Select the reason within the *Exclusion Modifier* field
5. If applicable, enter a free-text note for the override item within the *Note* field.
6. If applicable, enter the desired number of days under the *Suspend Measure* for field to suspend a measure alert for a specific number of days. Suspending a measure alert allows the user to avoid the display of the *Clinical Alert* pop-up window when accessing the EHR for applicable patients for the number of days specified
7. Once complete, click  **Save**.
8. The selected measure is now marked as an override item. The *Override Date* and *Override UserNo* columns within the result list section of the *Patient Health Maintenance* module will be updated appropriately.

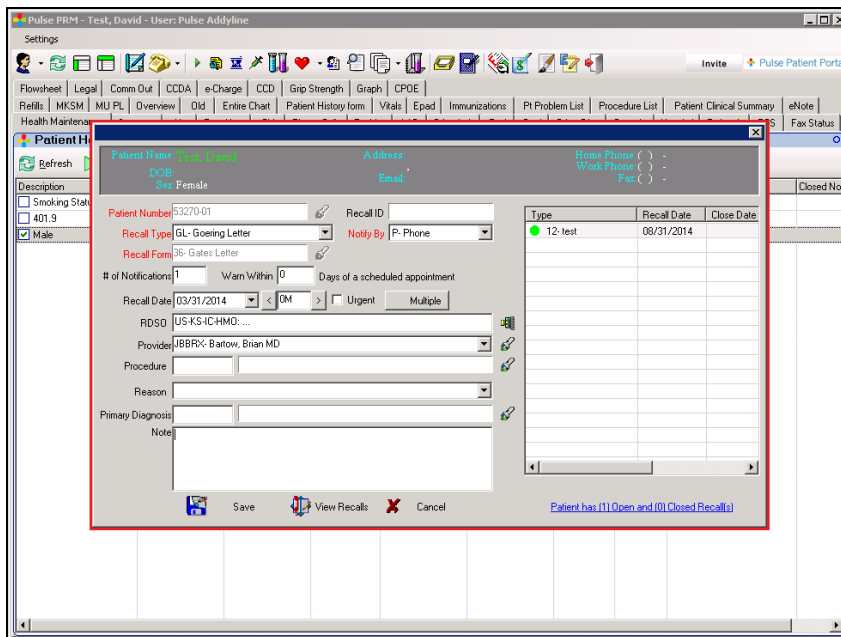
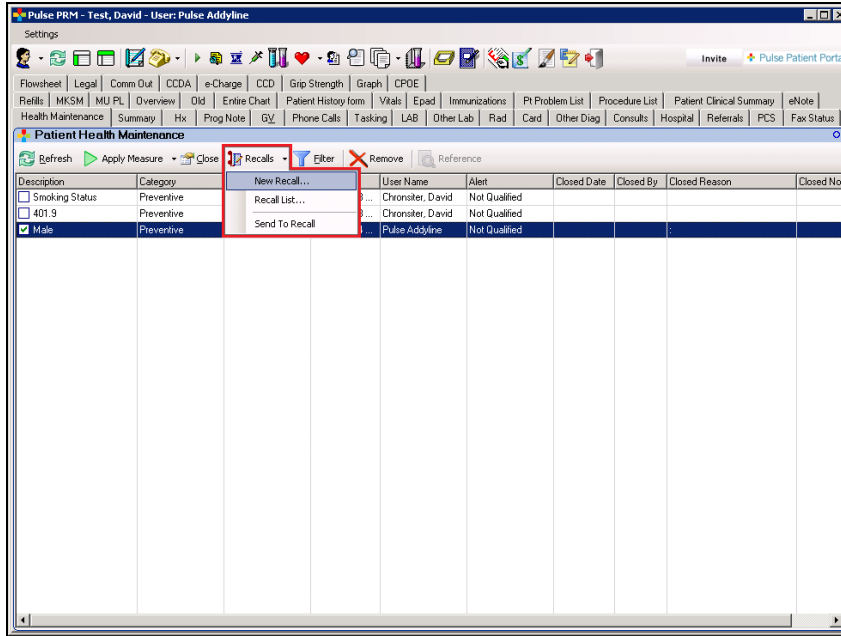
3.5 Utilizing Recalls Management within the Patient Health Maintenance module

Perform the following to utilize the recalls function within the *Patient Health Maintenance* module:







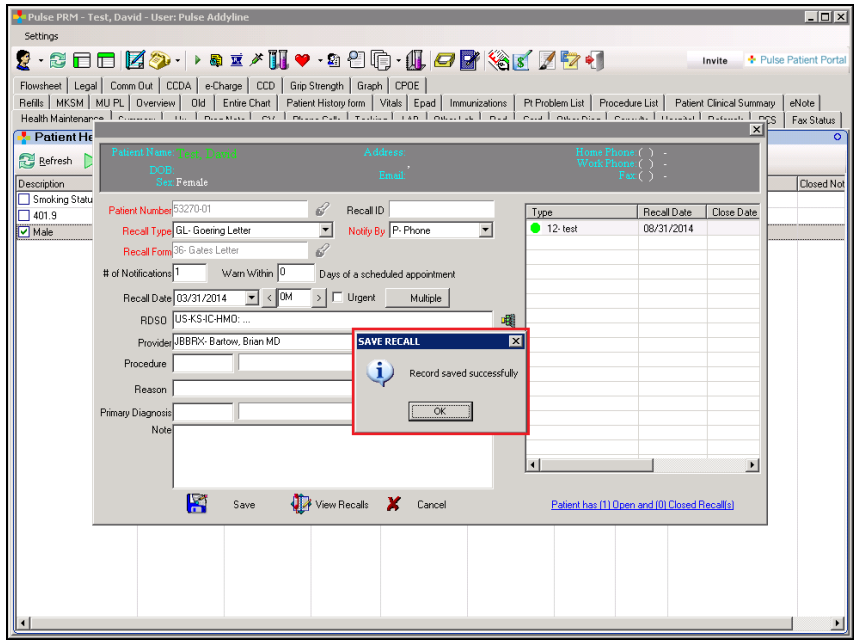
- Sending a measure to recall**
1. Within the *Patient Health Maintenance* module, check the box next to the desired under the Description column from result list.
 2. Click the **Recalls** toolbar icon and select *Send to Recall*
 3. A pop-up window asks if the user want to send the selected item to recall, click **Yes**.
 4. A second pop-up window confirms a recall has been generated for the selected measure




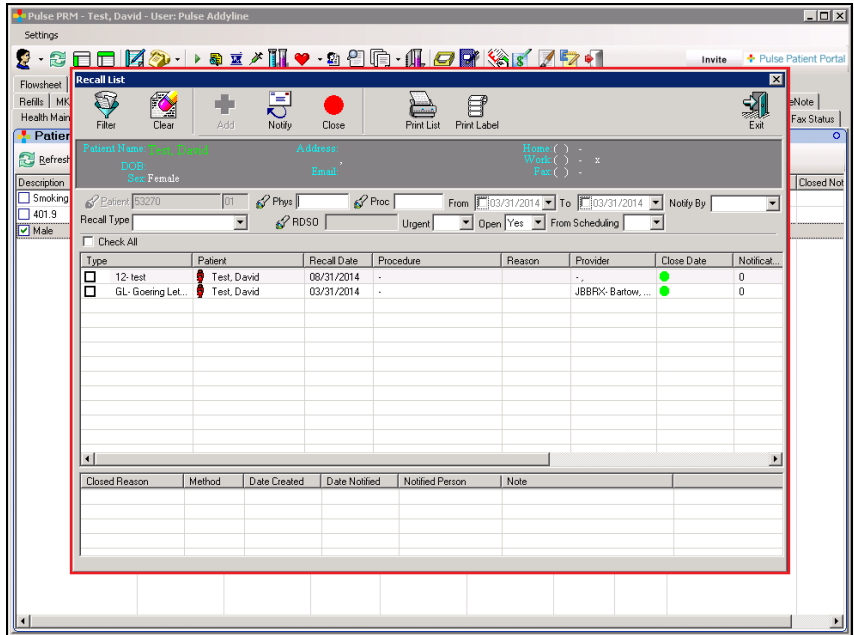





Creating a new recall

1. Click the  **Recalls** toolbar icon and select *New Recall*
2. The *New Measure* window displays
3. The *Patient Number* field is prefilled with the selected patient.
4. From the *Recall Type* field, select the applicable measure.
5. If needed, users can select *M-Mail*, *E-Email*, or *P-Phone* as the preferred notification method within the *Notify By* field.
- NOTE:** *M-Mail* or *E-Mail* must be selected to utilize selections within the *Recall Form* field
6. Within the *Recall Form* field, select the letter used to communicate the recall.
7. If needed, specify the number of notifications to distribute within the *# of Notifications* field.
8. If needed, specify a warning alert within the *Warn within Days of Schedule appointment* field.
9. The *RDSO* field is prefilled for the user. If applicable, click  within the *RDSO* to revised the recall facility.
10. If needed, click  within the *Provider* field to attach a provider.
11. If needed, click  within the *Procedure* field to attach a procedure.

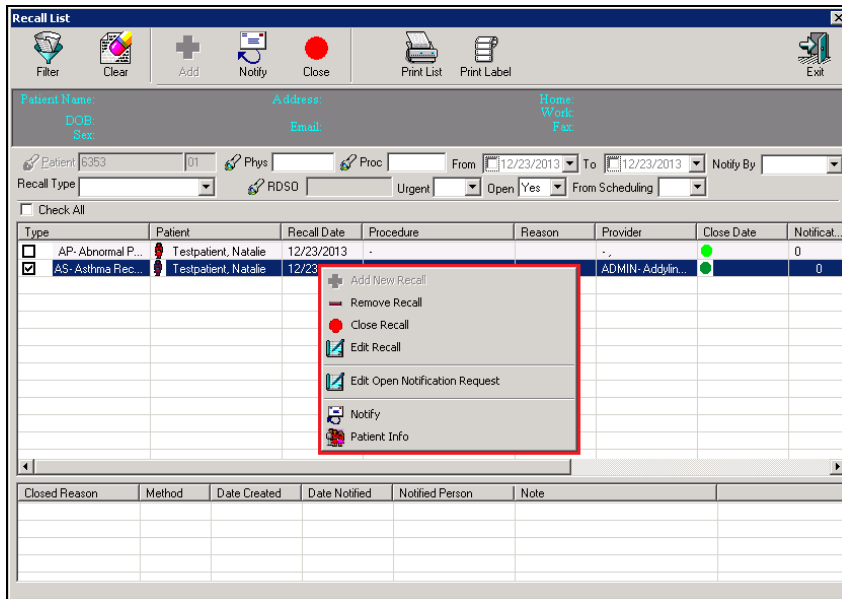
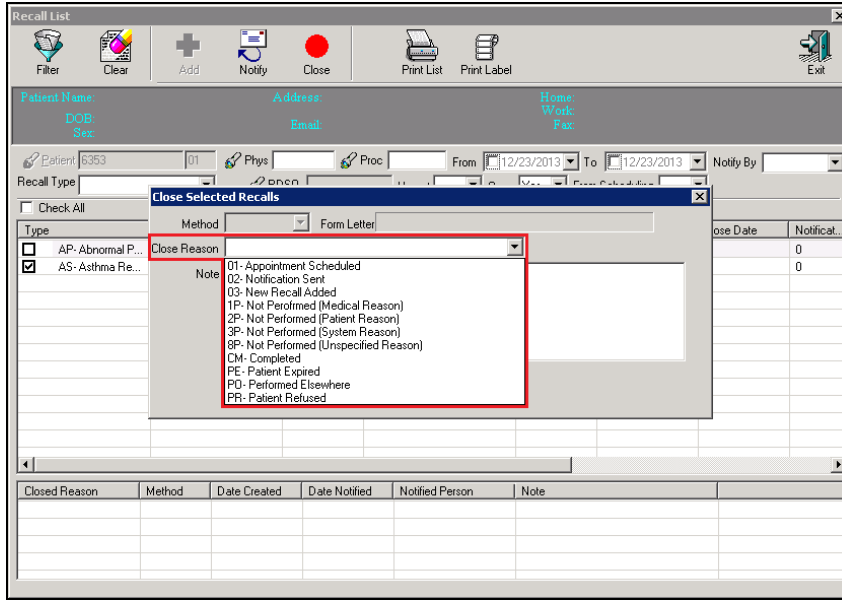


12. If needed, select a reason for the recall measure within the field.
13. If applicable, click  to attach a *Primary Diagnosis*
14. If needed, enter a free-text message within the *Note* field.
15. Once complete, click **Save**.
16. A pop-up message confirms the recall record saved successfully.



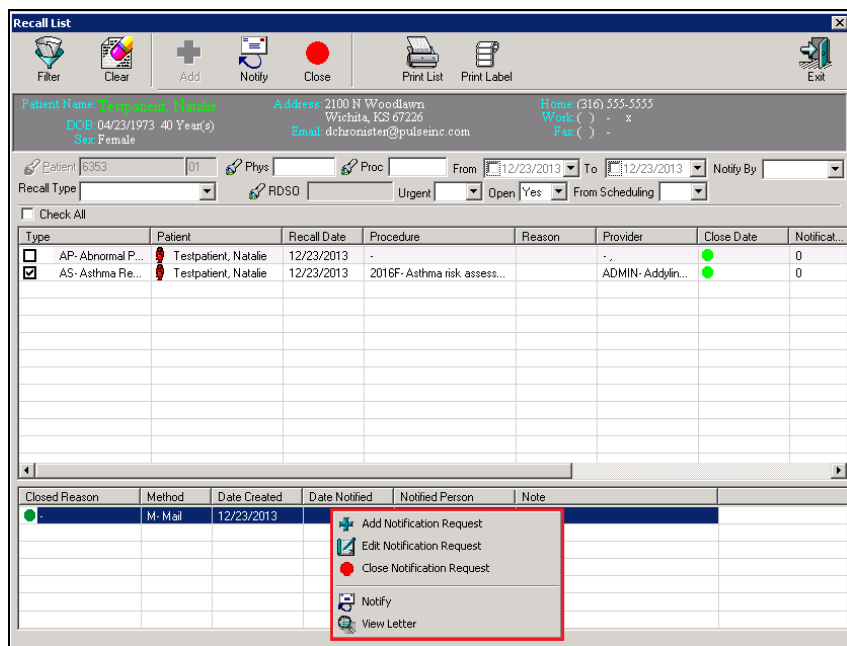
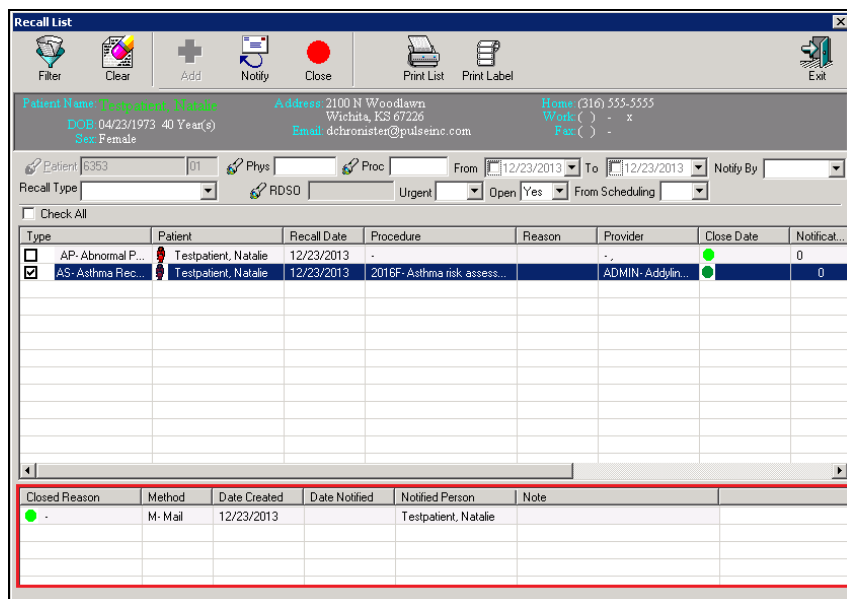
- Utilizing the Recalls List window**
1. User can view created recall items within the *Recall List* window
 2. To access the *Recall List*, click the  and select *Recalls List*
 3. The *Recalls List* displays. Through this window, users can view all created recall items for the patient.
 4. If needed, users can enter search criteria from the fields provided within the window and click  **Filter** to display specific result items
 5. From the toolbar section of the *Recalls List* window, users can check multiple items from the result section of the window and click  **Notify** to generate a batch notification.







6. To close a recall, select an item from the result section and click the **Close** toolbar icon.
7. The *Close Selected Recalls* window displays
8. From the *Close Reason* field, select the reason for closing the recall.
9. If applicable, enter a free-text message within the *Note* field.
10. Click **OK**
11. If needed, click the **Print List** icon to print a list of items within the *Recalls List*
12. If needed, click the **Print Label** icon to print a label for a selected recall item
13. From the result list, users can right-click on an item to access the right-click menu. Refer to the following for an overview of each available option:
 - a. **Remove Recall** – Enables the user to remove the selected item from the *Recall List*
 - b. **Close Recall** – Enables the user to close the selected recall item
 - c. **Edit Recall** – Enables the user to edit the selected recall item
 - d. **Edit Open Notification Request** – Enables the user to edit the notification request for the recall item






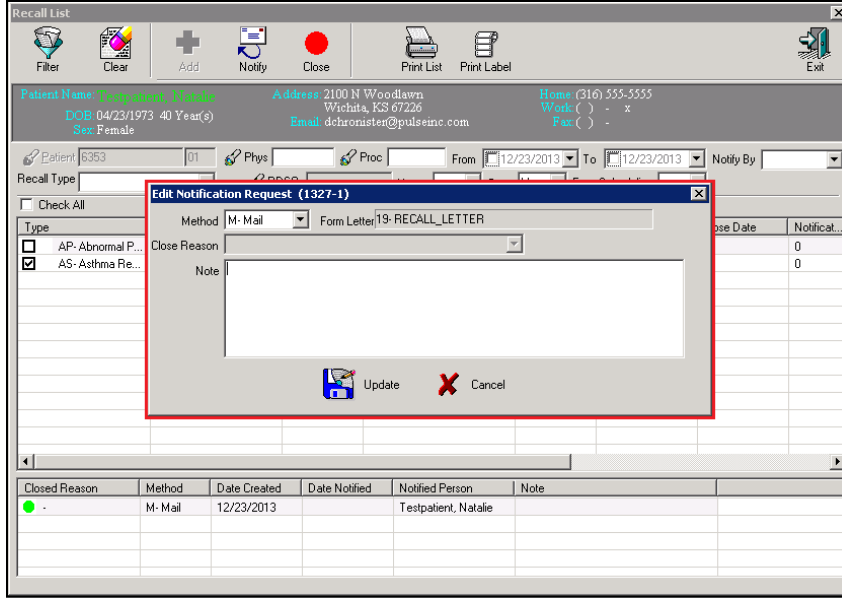
e.  **Notify** – Enables the user to send a notification for the selected recall item





f.  **Patient Info** – Enables the user to view the *Patient Information Summary* window for the selected recall item

14. The bottom portion of the *Recall List* window displays the open close notification status for recall items

15. If needed, users can right-click on an item within the bottom portion of the *Recall List* window to access the right-click menu. Refer to the following for an overview of each available option:

a.  **Add Notification Request** – If there is an open notification request, the user will get a pop-up message regarding the open notification. Click **No** to keep the notification open and leave the item unchanged. Click **Yes** to close the notification. In the *Close Notification* window, select the reason in the *Close Reason* text box and click **OK**. In the *Add New Notification* window, select the reason in the *Close Reason* text box and click **OK**.

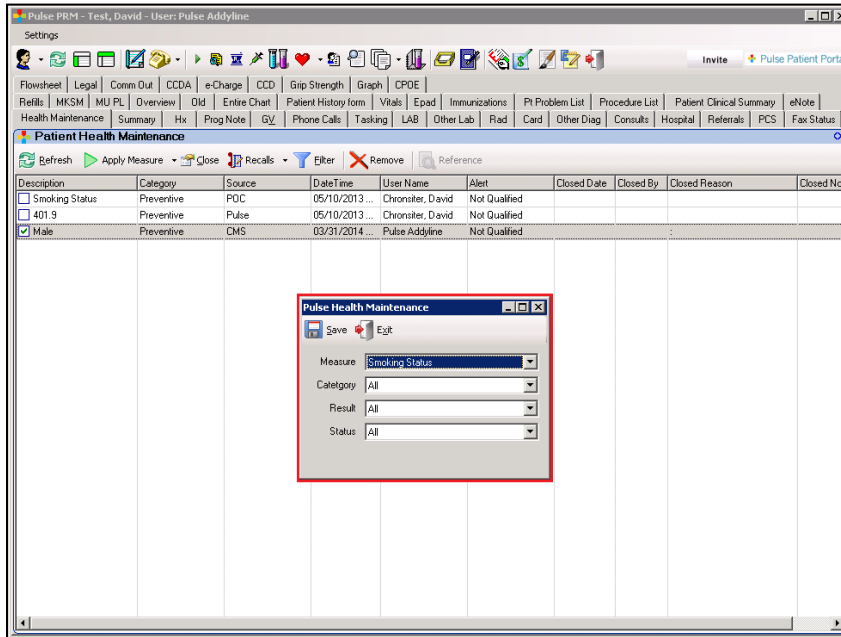


- b.  **Edit Notification Request** – Enables the user to change the notification method for the item.
- c.  **Close Notification Request** – Enables the user to close the selected notification item.
- d.  **Notify** – Enables the user to generate a notification for the selected item.
- e.  **View Letter** – Enables the user to view the notification letter for the selected item (available for *M – Mail* or *E – Email Methods only*.)

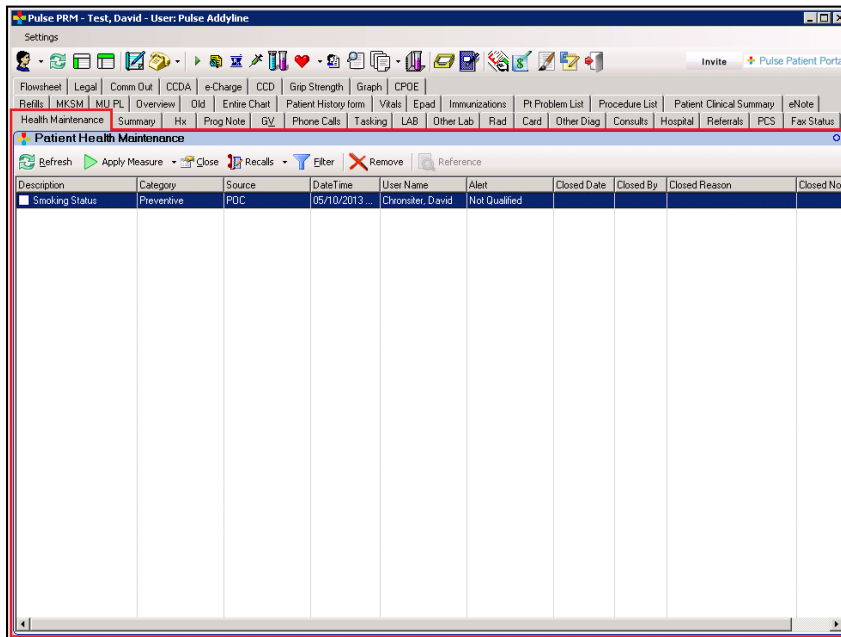


3.6 Filtering results within the Patient Health Maintenance module

Perform the following to filter results within the *Patient Health Maintenance* module:

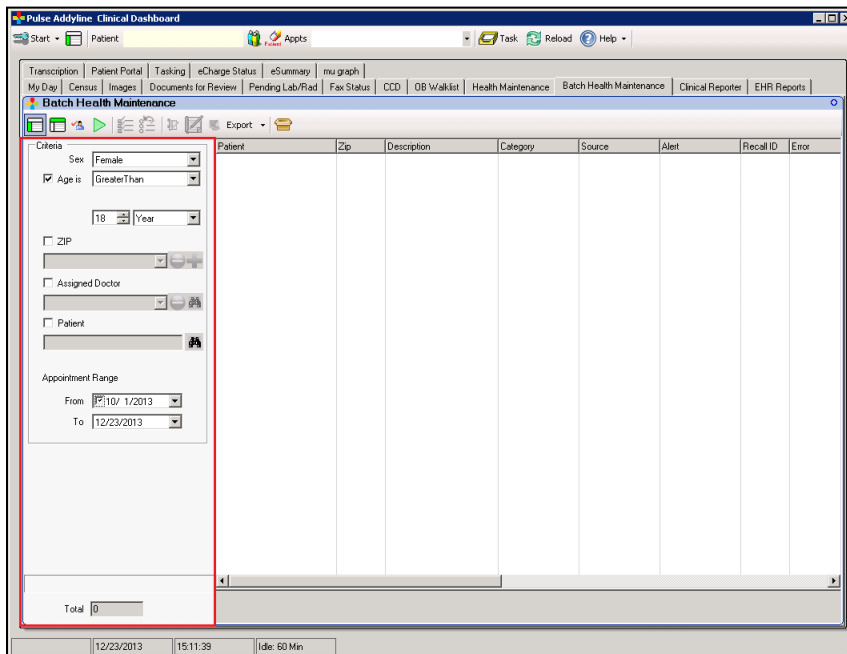
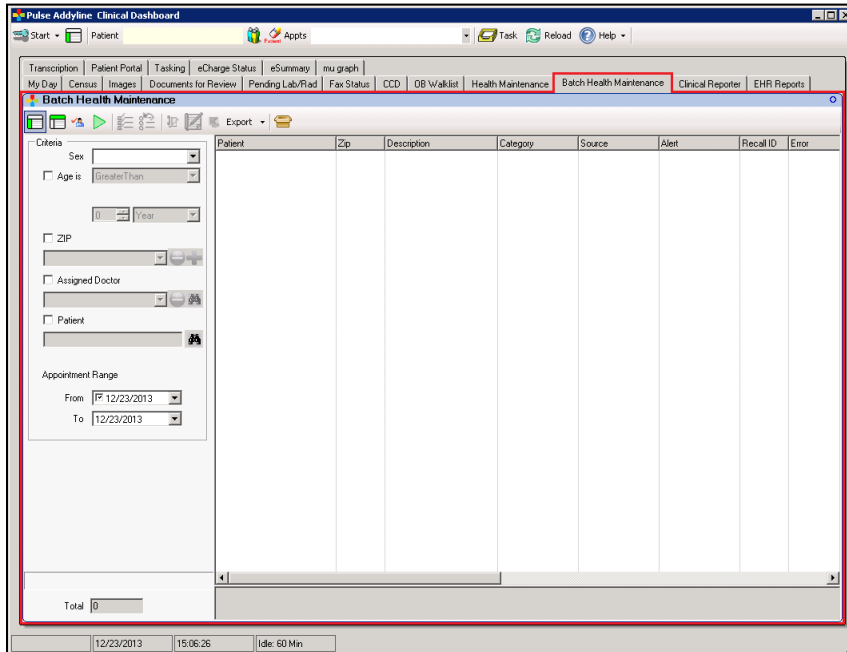






1. Within the *Patient Health Maintenance* module, click the **Filter** toolbar icon.
2. The *Filter* window appears.
3. From the provided fields, specify the criteria used to filter the patient's measure list results.
4. Once complete, click **Save**.
5. The *Patient Health Maintenance* module displays the measures matching the criteria specified within the *Filter* window.

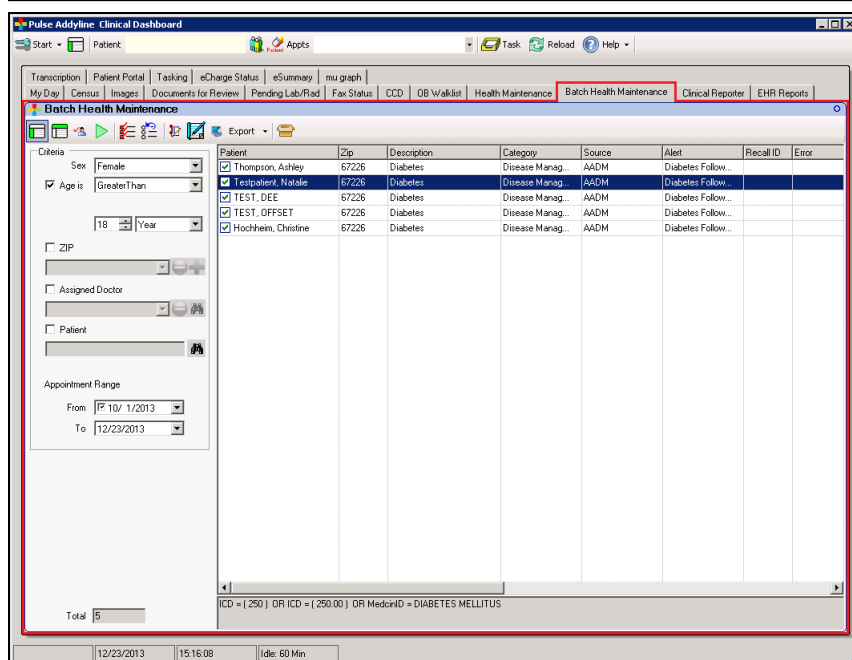
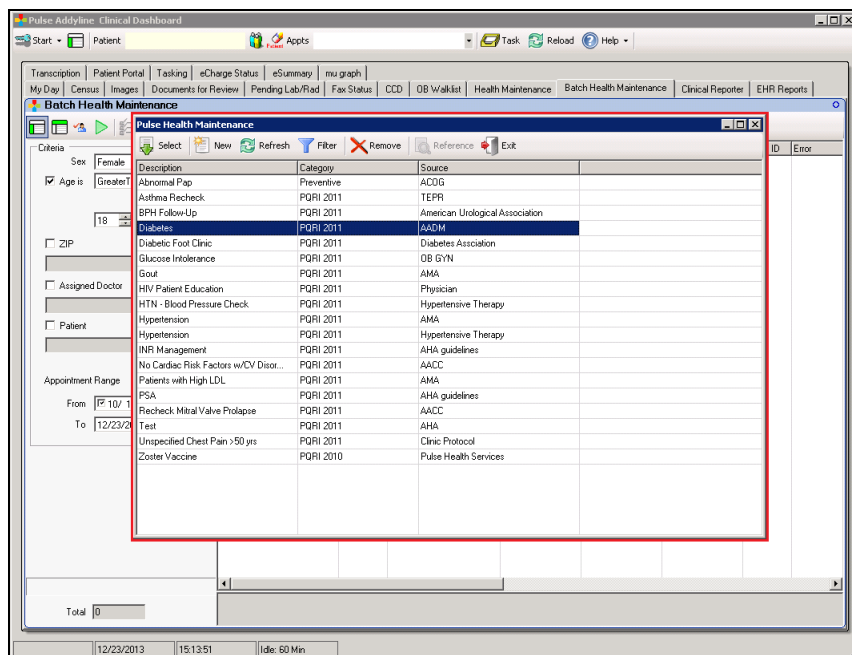










3.7 Filtering results within the Batch Health Maintenance module

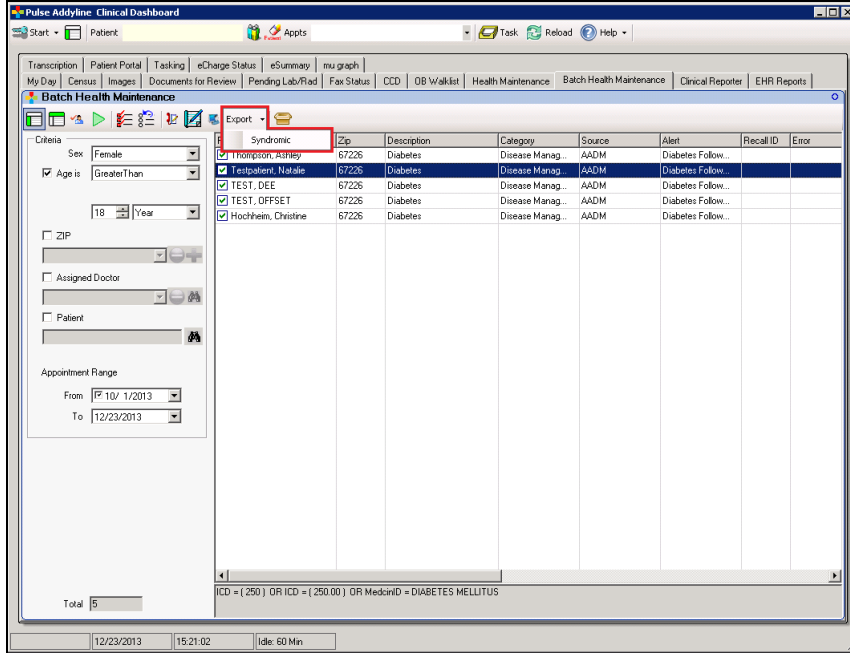
Perform the following to filter results within the *Batch Health Maintenance* module:



1. From the *User Dashboard*, locate the configured the *Batch Health Maintenance* module.
2. Click the  **Show/Hide Recall Criteria** icon to display the *Recall Criteria* section.
3. Within the *Recall Criteria* section of the window, enter the desired filter criterion:
 - a. To search by gender, select the desired option under the *Sex* field.
 - b. To search by age, check the box under the *Age is* field and specify the desired options under the corresponding fields.
 - c. To search by patient zip code, check the box under the *Zip* field, enter the desired zip code, and click  **Add**.
NOTE: Multiple zip codes can be added under the *Zip* field.
 - d. To search by assigned doctor, check the box under the *Assigned Doctor* field and click the corresponding  **Search** icon to locate and select the desired physician.
 - e. To search by specific patient, check the box under the *Patient* field and click the corresponding  **Search** icon to locate and select the desired patient.



- f. To search by specific date range, select the desired dates under the *From* and *To* fields.
- g. To view a count of the patients matching the specified filter criterion, click  **Count**.
4. Once the filter criterion is specified, click  **Apply**.
5. The *Measure List* window displays
6. Choose a measure to apply to the specified filter criterion from the displayed list and click  **Select**.
7. The results for the specified filter criteria displays within the results list section of the *Batch Health Maintenance* module.
8. If applicable, use  **Check All** or  **Uncheck All** to select or deselect all items within the results section.
9. If applicable, click  **Recalls** send the selected measure items to recall.
10. To schedule an appointment for a patient attached to a displayed result, select the desired patient under the result list section and click  **Schedule Appointment**.
11. To access the Patient EHR for a patient attached to a displayed result, select the desired patient under the result list section and click  **Patient EHR**.



The screenshot shows the 'Batch Health Maintenance' window in Pulse Addylite. The 'Export' button is highlighted with a red box. The window contains a table of patient data with columns for Syndromic, Zip, Description, Category, Source, Alert, Recall ID, and Error. The table lists several patients with Diabetes as the description. The 'Export' button is located at the top of the table area.

Syndromic	Zip	Description	Category	Source	Alert	Recall ID	Error
<input checked="" type="checkbox"/>	67226	Diabetes	Disease Manag...	AADM	Diabetes Follow...		
<input checked="" type="checkbox"/>	67226	Diabetes	Disease Manag...	AADM	Diabetes Follow...		
<input checked="" type="checkbox"/>	67226	Diabetes	Disease Manag...	AADM	Diabetes Follow...		
<input checked="" type="checkbox"/>	67226	Diabetes	Disease Manag...	AADM	Diabetes Follow...		

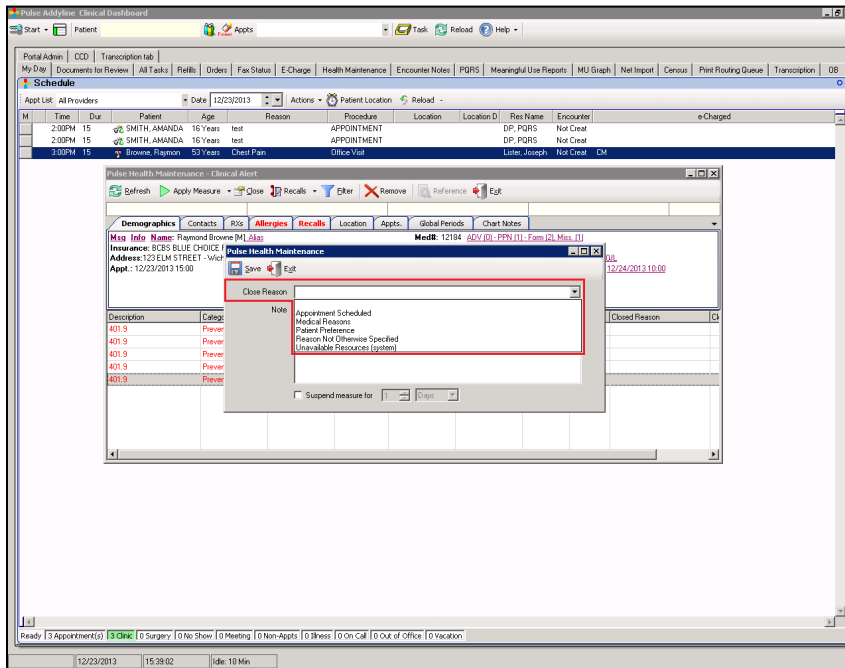
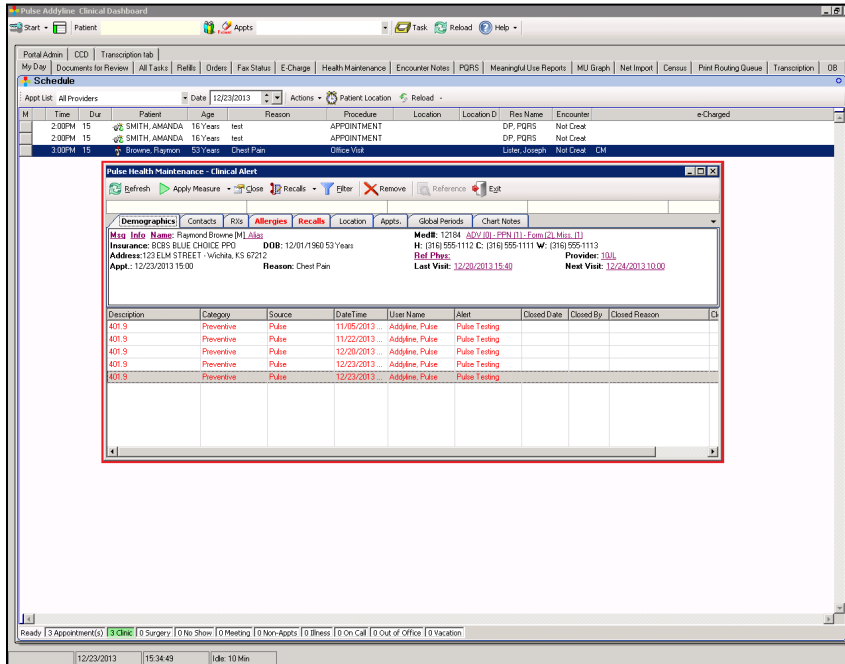
12. If applicable, click **Export** and select the configured public health reporting agency option to transmit an ADT A04 (Admit) message for each selected patient result with an appointment for the current date and a corresponding status of checked in.



NOTE: If the selected patient result has an appointment for the current date with a corresponding status of checked out, an ADT A03 (Discharge) message is sent to the configured public health reporting agency.



3.8 Overview of the Measure Alert window

Refer to the following for an overview of the *Measure Alert* window:



1. Configurable through the *Auto Run* box within the *Parameter Selection* window under the *Health Maintenance* module, the *Measure Alert* window appears whenever users attempt to access the Patient EHR for a patient matching the specified measure criteria.
2. The *Measure Alert* window displays the measure applied to the patient.
3. The user can click the  **Exit** icon to accept the applied measure and proceed to the *Patient Dashboard* -Or-
4. The user can click the  **Close** icon to close the measure item. Through the *Close Measure* window, users can select a reason through the *Close Reason* field and attach a free-text note.
5. Although a close reason can be applied to a measure, the *Measure Alert* window will remain active and continue to appear whenever the patient is accessed.
6. A history of close reasons applied to the patient can be viewed under the *Health Maintenance* module within the *Patient Dashboard*.

NOTE: If applicable, users can disable the display of the *Measure Alert* window by configuring the *Health Maintenance – Suppress Measure Alerts* security permission to *Granted*.