



ABOUT THIS GUIDE

This Guide provides a high-level overview of patient lists using the Report Builder feature in athenaClinicals and how it can be used to help identify clinically appropriate patients who may be candidates for therapy. The overview is meant to provide guidance for you, your practice electronic health record (EHR) champion, or IT staff.

Experienced users are the main focus of this Guide; not every step is included in the instructions, and this is not a replacement for training from athenaClinicals. There are several ways to approach each workflow in athenaClinicals. This Guide highlights one workflow; however, you may be familiar with an alternative approach. Please note that this Guide was created based upon athenaClinicals version 19. Screens and features may change as new software versions are released.



USING PATIENT LISTS

The Patient List can be helpful to identify patients meeting certain criteria, including diagnosis, current medications, and other clinical or patient demographic information. When used effectively, this report provides an opportunity to identify patients who are clinically appropriate for therapy based upon clinician decision to treat.

A Patient List can be used to identify a gap in care and to contact patients who may be considered for treatment.



PATIENT LIST CRITERIA

Patient lists can be created from multiple criteria such as medications, patient diagnoses or other clinical or patient demographic information. For example, EHR criteria could include patients with opioid dependence, taking buprenorphine medications such as Subutex or Suboxone.

See the appendix for a detailed list of criteria which may be appropriate to identify opioid dependent patients who may benefit from treatment.

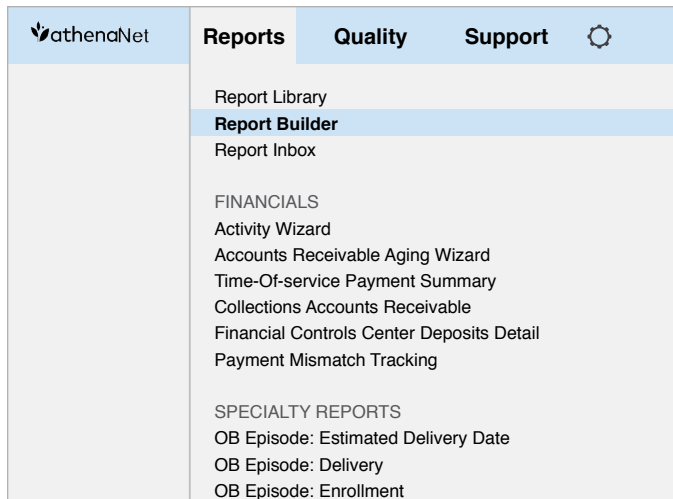


FACTORS THAT MAY IMPACT REPORT BUILDER RESULTS

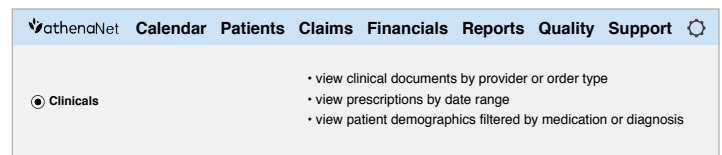
The number of patients appearing on a patient list may be impacted by the clinical data available in the EHR. For example, clinical data stored only in PDF documents or free text fields rather than discrete fields may not be included. These information gaps can reduce the number of patients on a patient list.

REPORT BUILDER: CREATING A PATIENT LIST

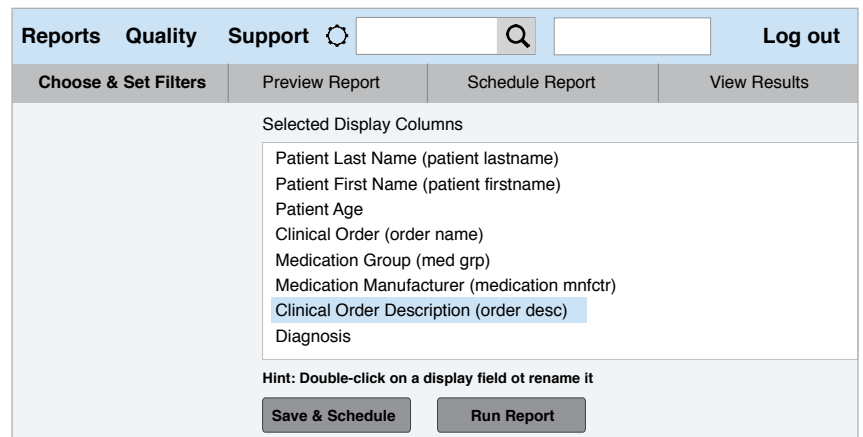
The following steps illustrate how to run a Patient List using Report Builder feature in athenaClinicals to help identify examples of appropriate patients who may be candidates for treatment.



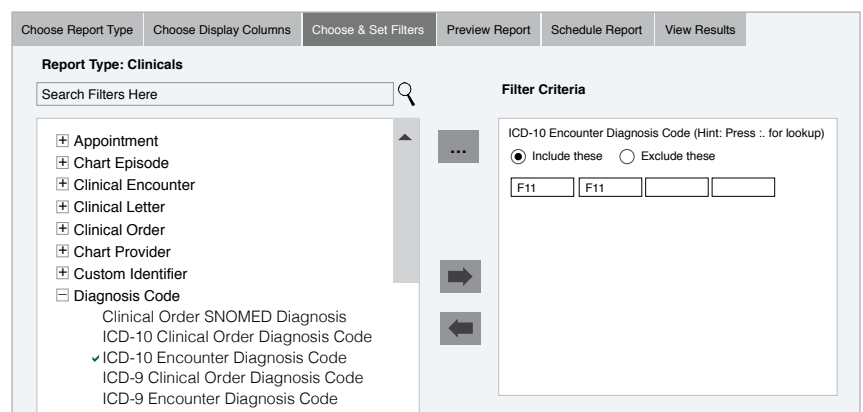
- Select **Reports** from the Menu. Select **Report Builder**, then select **Clinicals**



- Select the Columns to be displayed in the Report, such as: Patient Last Name, Patient First Name, Clinical Order Description, Medication Group, Diagnosis, etc



- Click **Choose & Set Filters**
- From the **Available Filters**, expand **Patient Demographics** then select **Age**. Set the Filter Criteria parameter to **≥ 16 years of age**
- As shown in the image to the right, expand the **Diagnosis Code** filter, then select **ICD-10 Encounter Diagnosis Code**
- In the **Filter Criteria**, enter appropriate diagnosis codes (See Appendix for a complete list of diagnosis codes)



- To include active medications, expand the **Clinical Order** filter, then select **Clinical Order**
- In the **Filter Criteria**, set an appropriate date range
- Enter a **medication name** in the **Clinical Order** text box, select the **Prescription option** of all appropriate strengths. Repeat for all appropriate medications. (See Appendix for a complete list of medications)

Report Builder

Choose Report Type | Choose Display Columns | **Choose & Set Filters** | Preview Report | Schedule Report | View Results

Report Type: Clinicals

Available Filters

- Appointment
- Chart Episode
- Clinical Encounter
- Clinical Letter
- Clinical Order
- Clinical Order
 - Clinical Order (Single)
 - Clinical Order Approved Date
 - Clinical Order Created Date
 - Clinical Order Custom Reporting Group (Department)
 - Clinical Order Date
 - Clinical Order Department
 - Clinical Order Department - Type of Bill
 - Clinical Order Department Billing Name
 - Clinical Order Department Communicator Brand
 - Clinical Order Department Group
 - Clinical Order Department NPI Number
 - Clinical Order Department Place of Service Type
 - Clinical Order Department Place of Service Type ID
 - Clinical Order Department Specialty

Filter Criteria

Clinical Encounter Date

Relative Date Range Month-to-Date
Dates: March 1 - March 5, 2020 (Assuming report is run today.)

Fixed Date Range from to

Clinical Order (Hint: You can add multiple order types.)

[PRESCRIPTION]: Buprenorphine HCl Sublingual Tablet Sublingual 2 MG

[PRESCRIPTION]: Buprenorphine HCl Sublingual Tablet Sublingual 8 MG

[PRESCRIPTION]: Suboxone Sublingual Film 2-0.5 MG

[PRESCRIPTION]: Suboxone Sublingual Film 4-1 MG

[PRESCRIPTION]: Suboxone Sublingual Film 8-2 MG

[PRESCRIPTION]: Buprenorphine HCl-Naloxone HCl Sublingual Tablet Sublingual 2-0.5 MG

[PRESCRIPTION]: Buprenorphine HCl-Naloxone HCl Sublingual Tablet Sublingual 8-2 MG

[PRESCRIPTION]: Buprenorphine HCl-Naloxone HCl Sublingual Film 2-0.5 MG

[PRESCRIPTION]: Buprenorphine HCl-Naloxone HCl Sublingual Film 4-1 MG

[PRESCRIPTION]: Buprenorphine HCl-Naloxone HCl Sublingual Film 8-2 MG

[PRESCRIPTION]: Buprenorphine HCl-Naloxone HCl Sublingual Film 12-3 MG

[PRESCRIPTION]: Bunavail Buccal Film 2.1-0.3 MG

[PRESCRIPTION]: Bunavail Buccal Film 4.2-0.7 MG

- Click on **Run Report**
- Choose **Report Format**.
Select **OK**

Choose Report Format

XML results display in web browser and can be resorted

Comma Delimited Text (CSV) results download to file that can be viewed in Microsoft Excel

Custom results download to a file that can be viewed in a text editor

Show Totals

Deidentify Patient Data

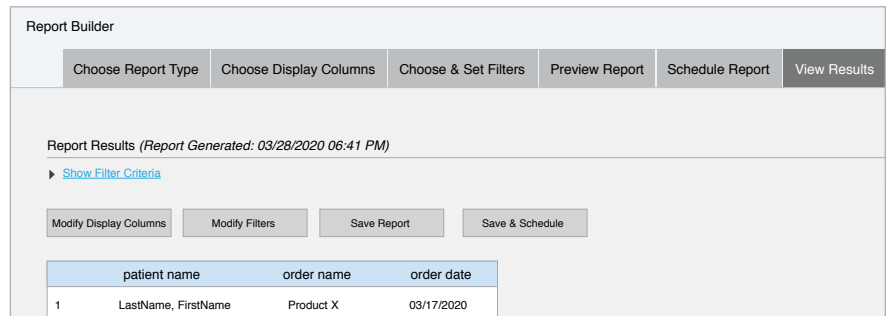
Show Reporting Restricted Patients

Show in Small Print

Hide Line Numbers

- Navigate to **View Results** tab

The resulting patient list can be saved for reuse. From the patient list on the View Results tab, each patient chart can be reviewed. The patient list can be also displayed in a web browser or exported to a spreadsheet to enable strategic data sorting and filtering.



Report Builder

Choose Report Type | Choose Display Columns | Choose & Set Filters | Preview Report | Schedule Report | **View Results**

Report Results (Report Generated: 03/28/2020 06:41 PM)

[Show Filter Criteria](#)

Modify Display Columns | Modify Filters | Save Report | Save & Schedule

	patient name	order name	order date
1	LastName, FirstName	Product X	03/17/2020

APPENDIX PATIENT IDENTIFICATION CRITERIA

1. Patient age, and
 - ≥ 16
2. ICD-10 Diagnosis Codes: and,
3. Medication history contains any of these medications based on drug name, strength and form:

ICD-10-CM Code	Code Description
F11	Opioid related disorders
F11.1	Opioid abuse
F11.10	Opioid abuse uncomplicated
F11.2	Opioid dependence
F11.20	Opioid dependence uncomplicated
F11.21	Opioid dependence in remission
F11.24	Opioid dependence with opioid-induced mood disorder
F11.25	Opioid dependence with opioid-induced psychotic disorder
F11.29	Opioid dependence with other opioid-induced disorder with unspecified opioid-induced disorder
F11.9	Opioid use, unspecified
F11.90	Opioid use, unspecified uncomplicated
F11.99	Opioid use, unspecified with unspecified opioid-induced disorder

- Buprenorphine HCl Sublingual Tablet Sublingual 2 MG
- Buprenorphine HCl Sublingual Tablet Sublingual 8 MG
- Suboxone Sublingual Film 2-0.5 MG
- Suboxone Sublingual Film 4-1 MG
- Suboxone Sublingual Film 8-2 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Tablet Sublingual 2-0.5 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Tablet Sublingual 8-2 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Film 2-0.5 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Film 4-1 MG
- Buprenorphine HCl-Naloxone HCl Sublingual Film 8-2 MG
- Bunavail Buccal Film 2.1-0.3 MG
- Bunavail Buccal Film 4.2-0.7 MG
- Zubsolv Sublingual Tablet Sublingual 0.7-0.18 MG
- Zubsolv Sublingual Tablet Sublingual 1.4-0.36 MG
- Zubsolv Sublingual Tablet Sublingual 2.9-0.71 MG
- Zubsolv Sublingual Tablet Sublingual 5.7-1.4 MG