



## ABOUT THIS GUIDE

This Guide provides a high-level overview of patient lists using the Custom Reports feature in Greenway Prime Suite and how they 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 Greenway Prime Suite. There are several ways to approach each workflow in Greenway Prime Suite. This Guide highlights one workflow; however, you may be familiar with an alternative approach. Please note that this Guide was created based upon Greenway Prime Suite v18. 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.



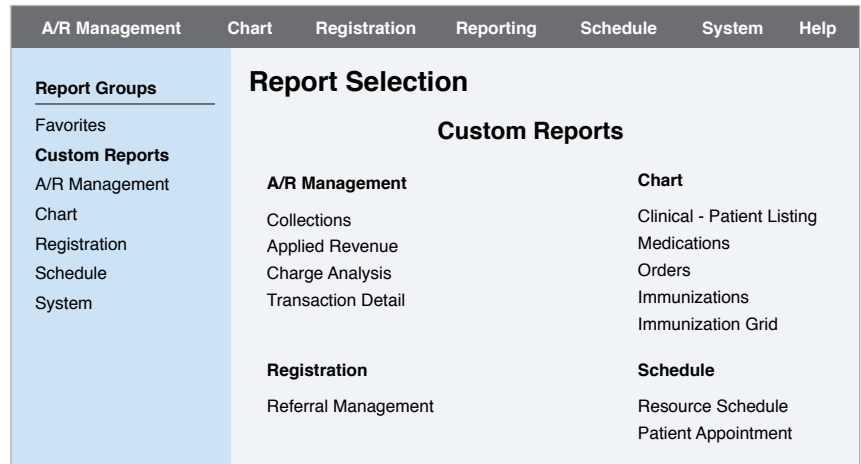
## FACTORS THAT MAY IMPACT CUSTOM REPORT RESULTS

The number of patients appearing on report results 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.

## CUSTOM REPORTS: CREATING A PATIENT LIST

The following steps illustrate how to run a patient list using Custom Reports feature in Greenway Prime Suite to help identify examples of appropriate patients who may be candidates for treatment.

- Navigate to **Custom Reports**
- Select **Clinical – Patient Listing** from the Custom Reports **Chart** menu



- Select **Filters for Custom Reports** to display the filter select list
- From the **Field Name** dropdown, select **Patient: Age**. Select **is greater than or equal to** operator. Enter **16** in the **Match Value** field
- Select **Diagnosis: Document Diagnosis ICD-10** from the **Field Name**. From the Operator dropdown, select **matches any value in list**. Select **Create Match List**

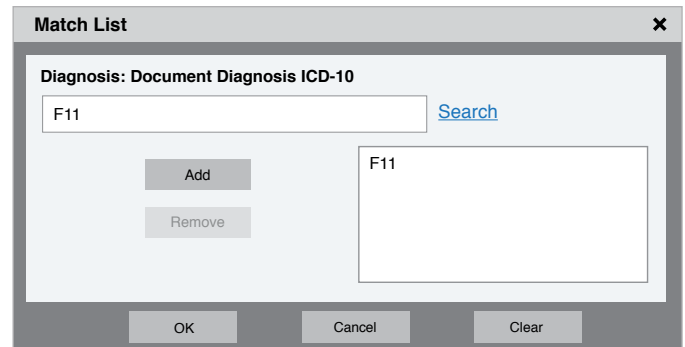
**Filters for Clinical - Patient Listing**

**Visible Fields**  
Patient: Name, Patient: ID, Patient: Date of Birth, Patient: Next Appt Date, Date: Last Visit Date

**Current Report Filters** (Match ALL Filters)

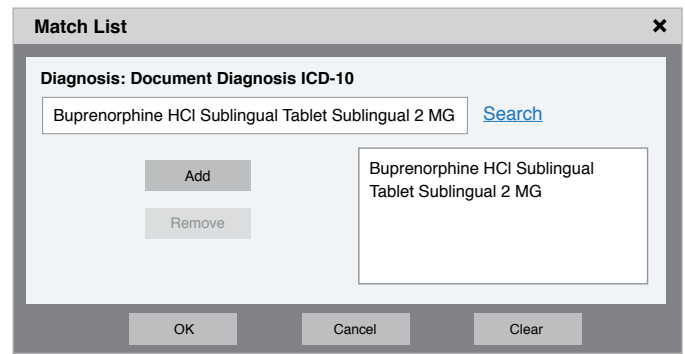
Field Name	Operator	Match Value	
<b>Report Filters</b> <span style="float: right;">✕</span>			
Match ALL Filters ▾			
Patient: Age ▾	is greater than or equal to ▾	16	Clear
Diagnosis: Document Diagnosis ICD-10 ▾	matches any value in list ▾	<a href="#">Create Match List</a>	Clear
▾	▾	▾	Clear
▾	▾	▾	Clear
▾	▾	▾	Clear

- In the **Match List** window, search and select all appropriate **diagnosis codes**. Choose **Add** to select each. Repeat to include all desired diagnosis codes. (See Appendix for a complete list of diagnosis codes)
- Select **OK** to complete the Match List



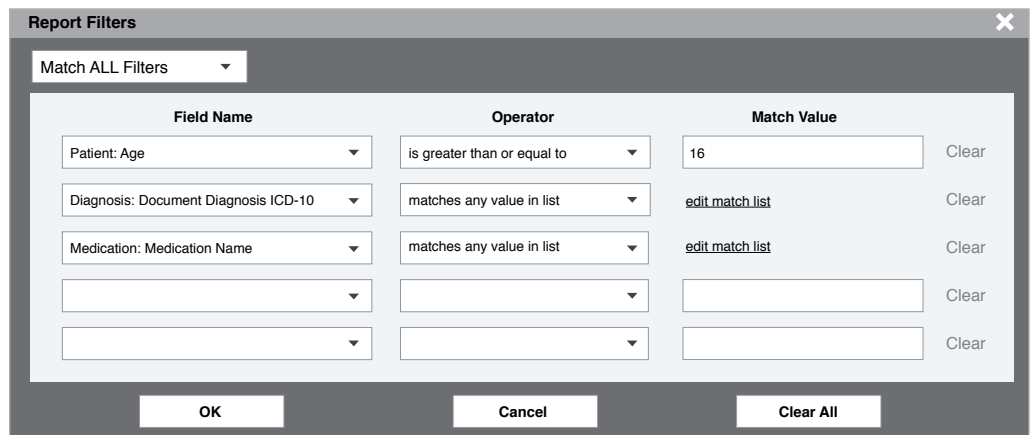
The screenshot shows the 'Match List' window with the title 'Diagnosis: Document Diagnosis ICD-10'. A search box contains 'F11' and a 'Search' button. Below the search box are 'Add' and 'Remove' buttons. A list box on the right contains 'F11'. At the bottom are 'OK', 'Cancel', and 'Clear' buttons.

- From the **Field Name** dropdown, select **Medication: Medication Name**. From the **Operator** dropdown, select **matches any value in list**. Select **Create Match List**
- In the **Match List** window, search and select all appropriate **medications**. Choose **Add** to select each. Repeat to include all desired medications. (See Appendix for a complete list of Medications)



The screenshot shows the 'Match List' window with the title 'Diagnosis: Document Diagnosis ICD-10'. A search box contains 'Buprenorphine HCl Sublingual Tablet Sublingual 2 MG' and a 'Search' button. Below the search box are 'Add' and 'Remove' buttons. A list box on the right contains 'Buprenorphine HCl Sublingual Tablet Sublingual 2 MG'. At the bottom are 'OK', 'Cancel', and 'Clear' buttons.

- Choose **OK** to complete the Match List
- From the Report Filters, ensure that **Match ALL Filters** is selected and choose **OK**



The screenshot shows the 'Report Filters' window with a dropdown menu set to 'Match ALL Filters'. Below this is a table with columns for 'Field Name', 'Operator', and 'Match Value'. Each row has a 'Clear' button to its right.

Field Name	Operator	Match Value	
Patient: Age	is greater than or equal to	16	Clear
Diagnosis: Document Diagnosis ICD-10	matches any value in list	<a href="#">edit match list</a>	Clear
Medication: Medication Name	matches any value in list	<a href="#">edit match list</a>	Clear
			Clear
			Clear

At the bottom are 'OK', 'Cancel', and 'Clear All' buttons.

- From the Actions Menu, choose **Save Filters**. Then select Immediate, Background or Schedule to run the report

The resulting custom report can be saved for reuse. Reports run immediately can be printed or exported to a spreadsheet to enable strategic data sorting and filtering.

## APPENDIX PATIENT IDENTIFICATION CRITERIA

1. Patient age, and

- $\geq 16$

2. ICD-10 Diagnosis Codes: and,

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

3. Medication history contains any of these medications based on drug name, strength and form:

- 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