

# Nephrology Focused Reports

Last Modified on 02/05/2024 10:21 pm EST

## Nephrology eGFR Statuses Report

### Introduction

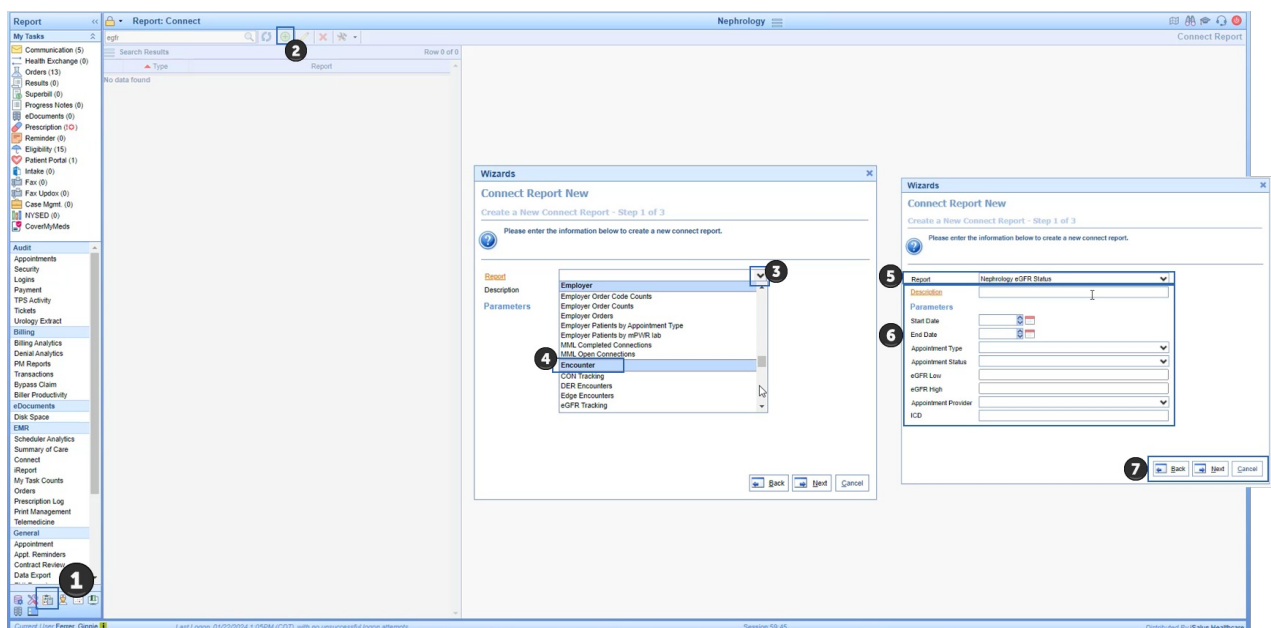
This new connect report is report focused on nephrology practices treating patients with Chronic Kidney Disease (CKD) but is versatile and can be used for various needs associated with patients that have eGFR results and active Problem List ICD codes.

### Highlights

- Aids CKCC and other Nephrology practices on compiling a list of patients based on active Problem List ICD Codes and with an eGFR result based on a specified eGFR result range, and based on specified appointment date range, appointment type, appointment status, and appointment providers
- With the patient population built, the report provides statuses for various CKD focused referrals and specified procedures to aid in tracking services documented as performed and not performed
- The report provides vast patient demographic details and both report filtered appointment data, and the patient's *next appointment data based on the next occurring appointment from current date*
- When the report date is set to a date before today, those details allow the practice to see the patient's *last Appointment*

### Adding the Report

If you want to add this new report to your OfficeEMR system, the instructions can be found [here](#). On step 3 of those instructions, you will access the Patient report header and look for the report named **eGFR Referral Education Status Report**.



# Report Filters

As shown below, the user can enter an appointment date range (the intent is to run for a single appointment date or up to a week, depending on appointment volume - which is impacted by the other appointment filters). For example, if you are running for a larger practice and want to run all providers, then the recommendation would be to run for a single appointment date.

The additional filters for Appointment Type, Appointment Status, and Appointment Provider allow you to create versions of the report for each provider or group of providers, and then narrow down the Appointment Types you generally need to see this data for while excluding appointments for Labs or other services that would not be necessary or would lead to duplicate patient entries on the report. Finally, depending on how the practice is using this report (looking back at visits from yesterday, looking at today, or looking at tomorrow) the Appointment Status filter allows you to narrow down what the report needs to search to improve performance in running the report. If I am looking at yesterday, I am likely only want to see which patients have an Appointment Status of "Checked Out" for *yesterday's date, and then whatever other filters I would need*. If I were running today or tomorrow, I might want to include Appointment statuses like Scheduled, Arrived, and Checked In, for example.

This report was intended to allow various versions to be created and saved for maximum flexibility getting details on CKD Education, Advance Directive Status, and Referral Statuses as noted in the screen below. Furthermore, you can see there is flexibility in the eGFR range you can run, the ICD (active Problem List) items you can input in a comma separated list format, and various other appointment related filters.

The screenshot shows a software window titled "Wizards" with a close button (X) in the top right corner. The main title is "Connect Report Edit" and the subtitle is "Edit a Connect Report - Step 1 of 3". Below the subtitle is a message: "Please enter the information below to edit a connect report." with a question mark icon. The form contains the following fields:

- Report: Nephrology eGFR Status (dropdown menu)
- Description: eGFR 0-30 N184-185 All Provs Scheduled or Confirmed (text input)
- Parameters section:
  - Start Date: 02/05/2024 (calendar icon)
  - End Date: 02/09/2024 (calendar icon)
  - Appointment Type: All Appointment Types (dropdown menu)
  - Appointment Status: 2 Items (dropdown menu)
  - eGFR Low: 0 (text input)
  - eGFR High: 30 (text input)
  - Appointment Provider: \*\*\* All (dropdown menu)
  - ICD: N184,N185 (text input)

At the bottom right, there are three buttons: "Back" (with a left arrow), "Next" (with a right arrow), and "Cancel".

# Report Output Example

Below is an example of the data fields exported for this report (including all fields):

| Nephrology eGFR Status Connect Report Example.xls |           |            |             |        |            |                  |           |          |       |       |                |             |                |                  |                  |                      |                      |  |  |
|---|-----------|------------|-------------|--------|------------|------------------|-----------|----------|-------|-------|----------------|-------------|----------------|------------------|------------------|----------------------|----------------------|--|--|
| A   | B         | C          | D           | E      | F          | G                | H         | I        | J     | K     | L              | M           | N              | O                | P                | Q                    | R                    |  |  |
| patient_id  | last_name | first_name | middle_name | gender | birth_date | address_1        | address_2 | city     | state | zip   | home_phone     | other_phone | work_phone     | email            | appointment_date | appointment_resource | appointment_location |  |  |
| 9320  | Underwood | Ben        |             | Male   | 04/01/1966 | 1234 Test Street |           | Tuplelo  | MS    | 38801 | (555) 337-2319 |             |                |                  | 01/05/2024       | Cool MD, Carly       | QA Test              |  |  |
| 37346   | Davis     | THOMAS     | W           | Male   | 01/24/1936 | 1234 Test Street |           | POHOTOOC | MS    | 38863 | (555) 337-2319 |             | (555) 337-2278 | T-Davis@test.com | 03/05/2024       | Cool MD, Carly       | AAOE 4               |  |  |

| Q                    | R                    | S                | T                  | U              | V           | W          | X                  | Y                   | Z              | AA                 | AB        | AC        | AD                      | AE                  | AF           |
|----------------------|----------------------|------------------|--------------------|----------------|-------------|------------|--------------------|---------------------|----------------|--------------------|-----------|-----------|-------------------------|---------------------|--------------|
| appointment_resource | appointment_location | appointment_type | appointment_status | appointment_id | result_date | eGFR       | next_appt_location | next_appt_date_time | next_appt_type | next_appt_provider | has_G0420 | has_99497 | Peritoneal_Dialysis_Ref | Transplant_Eval_Ref | Vascular_Ref |
| Cool MD, Carly       | QA Test              |                  | Check-ed-in        |                | 142179      | 01/01/2019 | 11                 |                     |                |                    | Y         | Y         | Y                       | Y                   | Y            |
| Cool MD, Carly       | AAOE 4               | New Complaint    | Scheduled          |                | 142116      | 12/20/2019 | 5.97               |                     |                |                    | Y         | Y         | Y                       | Y                   | Y            |

## Report Fields

|    |                         |  |
|----|-------------------------|--|
| 1  | patient_id              | Provides the patient Chart#  |
| 2  | last_name               | Patient Last Name  |
| 3  | first_name              | Patient First Name   |
| 4  | middle_name             | Patient Middle Name  |
| 5  | gender                  | Patient gender   |
| 6  | birth_date              | Patient date of birth  |
| 7  | address_1               | Patient address1   |
| 8  | address_2               | Patient address2   |
| 9  | city                    | Patient City   |
| 10 | state                   | Patient State  |
| 11 | zip                     | Patient Zip  |
| 12 | home_phone              | Patient Home Phone   |
| 13 | other_phone             | Patient Other Phone  |
| 14 | work_phone              | Patient Work Phone   |
| 15 | email                   | Patient email address  |
| 16 | appointment_date        | This is the appointment date(s) returning based on the parameter date range and filters entered  |
| 17 | appointment_resource    | Resource for the appointment date for the appointment row (16)   |
| 18 | appointment_location    | Location for the appointment date for the appointment row (16)   |
| 19 | appointment_type        | Type for the appointment date for the appointment row (16)   |
| 20 | appointment_status      | Status for the appointment date for the appointment row (16)   |
| 21 | appointment_id          | Appointment ID is used for technical team reasons and not necessarily helpful for practice selection   |
| 22 | result_date             | Date of the most recent eGFR recorded for the patient record   |
| 23 | eGFR                    | eGFR value for the associated Result Date (which is the last recorded eGFR result by descending date order)  |
| 24 | next_appt_location      | Next Appt Location for the appointment date for the appointment row (16)   |
| 25 | next_appt_date_time     | Next Appt Date and Time for the patient  |
| 26 | next_appt_type          | Next Appt Type for the patient   |
| 27 | next_appt_provider      | Next Appt Provider for the patient   |
| 28 | has_G0420               | This is a Yes/No query for the referenced Procedure Code. A Y indicates this patient has a history of Procedure Code G0420 recorded (CKD Education), otherwise N appears                                       |
| 29 | has_99497               | This is a Yes/No query for the referenced Procedure Code. A Y indicates this patient has a history of Procedure Code 99497 recorded (Advanced Directives), otherwise N appears                                 |
| 30 | Peritoneal_Dialysis_Ref | This is a Yes/No query for the Global Entity ID = 1102582 (Peritoneal Dialysis Referral). A Y indicates this patient has a history of an order for Peritoneal Dialysis Referral (1102582), otherwise N appears |
| 31 | Transplant_Eval_Ref     | This is a Yes/No query for the Global Entity ID = 81813 (Transplant Evaluation Referral). A Y indicates this patient has a history of an order for Transplant Evaluation Referral (81813), otherwise N appears |
| 32 | Vascular_Ref            | This is a Yes/No query for the Global Entity ID = 305682 (Vascular Referral). A Y indicates this patient has a history of an order for Vascular Referral (305682), otherwise N appears                         |

# About the eGFR Less 20 Referral Education Status Report

## Introduction

The eGFR Referral Education Status Report for Nephrology groups compiles a list of patients that have an eGFR that is under 20, and provides demographic data, last and next appointment details, and provides the current yes/no status on CKD education (billed as G0420), documented referral for Peritoneal Dialysis (when your template uses global entity ID# 1102582), Transplant Evaluation (when your template uses global entity ID# 81813), and Vascular (when your template uses global entity ID# 305662). The date filter for this report allows you to compile patients based on a Last Appointment Date range or a Next Appointment date range. The report also allows users to filter this report by selected appointment type location and/or selected appointment type provider.

## Highlights

- Aids CKCC and other Nephrology practices on identifying patients that meet CKD4 and CKD5 eGFR levels and evaluate the patient to ensure the proper referrals have been performed
- The report details and filters provide data elements to help practices obtain provider/location specific details in a way that helps them catch up with patients when the patients are seen in clinic, when filtering by Next Appointment
- The report can also be used by case managers for after-care follow up when filtering by Last Appointment

## Adding the Report

If you want to add this new report to your OfficeEMR system, the instructions can be found [here](#). On step 3 of those instructions, you will access the Patient report header and look for the report named **eGFR Referral Education Status Report**.

## Report Filters

### Filter by Last Appointment Date Type (Searching Past Appointment Dates)

The screenshot shows a 'Wizards' window titled 'Connect Report Edit' with the subtitle 'Edit a Connect Report - Step 1 of 3'. It contains a message: 'Please enter the information below to edit a connect report.' Below this, there are several fields: 'Report' and 'Description' both set to 'eGFR Less 20 Referral Education Status Report'. Under the 'Parameters' section, 'Date Type' is set to 'Last Appointment Date'. 'Start Date' is '07/02/2018' and 'End Date' is '08/31/2023'. 'Next Appt Provider' and 'Next Appt Location' are both set to '\*\*\* All'. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

### Filter by Next Appointment Date Type (Searching Today or Future Dates)

The screenshot shows a 'Wizards' window titled 'Connect Report Edit' with the subtitle 'Edit a Connect Report - Step 1 of 3'. It contains a message: 'Please enter the information below to edit a connect report.' Below this, there are several fields: 'Report' and 'Description' both set to 'eGFR Less 20 Referral Education Status Report'. Under the 'Parameters' section, 'Date Type' is set to 'Next Appointment Date'. 'Start Date' is '07/02/2018' and 'End Date' is '08/31/2023'. 'Next Appt Provider' and 'Next Appt Location' are both set to '\*\*\* All'. At the bottom are 'Back', 'Next', and 'Cancel' buttons.

# Report Output Example

| AutoSave   |            | eGFR Less 20 Referral Education Status Report.xlsx - Excel |                                    |                      |              |               |                |                  |             |             |                   |                |                |                     |           |              | GINNIE FERRER |       |                     |                    |                       |                    |                     |                    |                    |
|------------|------------|--|------------------------------------|----------------------|--------------|---------------|----------------|------------------|-------------|-------------|-------------------|----------------|----------------|---------------------|-----------|--------------|---------------|-------|---------------------|--------------------|-----------------------|--------------------|---------------------|--------------------|--------------------|
| patient_id | eGFR       | Referral<br>Transplant<br>Evaluation                       | Peritoneal<br>Dialysis<br>Referral | Vascular<br>Referral | patient_last | patient_first | patient_middle | patient_nickname | patient_age | patient_DOB | email             | home_phone     | other_phone    | address_1           | address_2 | city         | state         | zip   | next_appt_date_time | next_appt_location | next_appointment_type | next_appt_provider | last_appt_date_time | last_appt_location | last_appt_provider |
| 10456      | 15/02/2012 | N  | N                                  | N                    | Sagarnee     | Brian         | F              |                  | 63y         | 03/04/1960  | jancheb@gmail.com | (212) 525-2528 | (555) 555-5569 | Primo Circle        |           | Indianapolis | IN            | 46204 | 8/8/2013 0:00:00    | Aushoon Plaza      | 30 Min Slot           | Jadhava, Stanley   | 2/8/2013 0:00:00    |                    | Brooks, Kristi     |
| 31132      | 15/03/2012 | N  | N                                  | N                    | locant       | test          | F              | CKCC             | 121y        | 11/12/1901  | lmsa@gmail.com    | (317) 555-6058 | (317) 555-2016 | 15 N Cross Lakes Dr |           | Indianapolis | IN            | 46204 | 8/27/2013 0:00:00   | AADE 1             | 20 Min Slot           | Brooks, Kristi     | 5/27/2013 0:00:00   | SALLUS HealthCare  | Jadhava, Stanley   |

## Report Fields

- patient\_id
- eGFR
- result\_date
- HX\_of\_G0420
- Referral\_Transplant\_Evaluation (based on template global entity ID# 81813)
- Vascular\_Referral (based on template global entity ID# 305662)
- Peritoneal\_Dialysis\_Referral (based on template global entity ID# 1102582)
- patient\_last
- patient\_first
- patient\_middle
- patient\_nickname
- patient\_age
- patient\_DOB
- email
- home\_phone
- other\_phone
- address\_1
- address\_2
- city
- state
- zip
- next\_appt\_date\_time
- next\_appt\_location
- next\_appointment\_type
- next\_appt\_provider
- last\_appt\_date\_time
- last\_appt\_location
- last\_appt\_provider