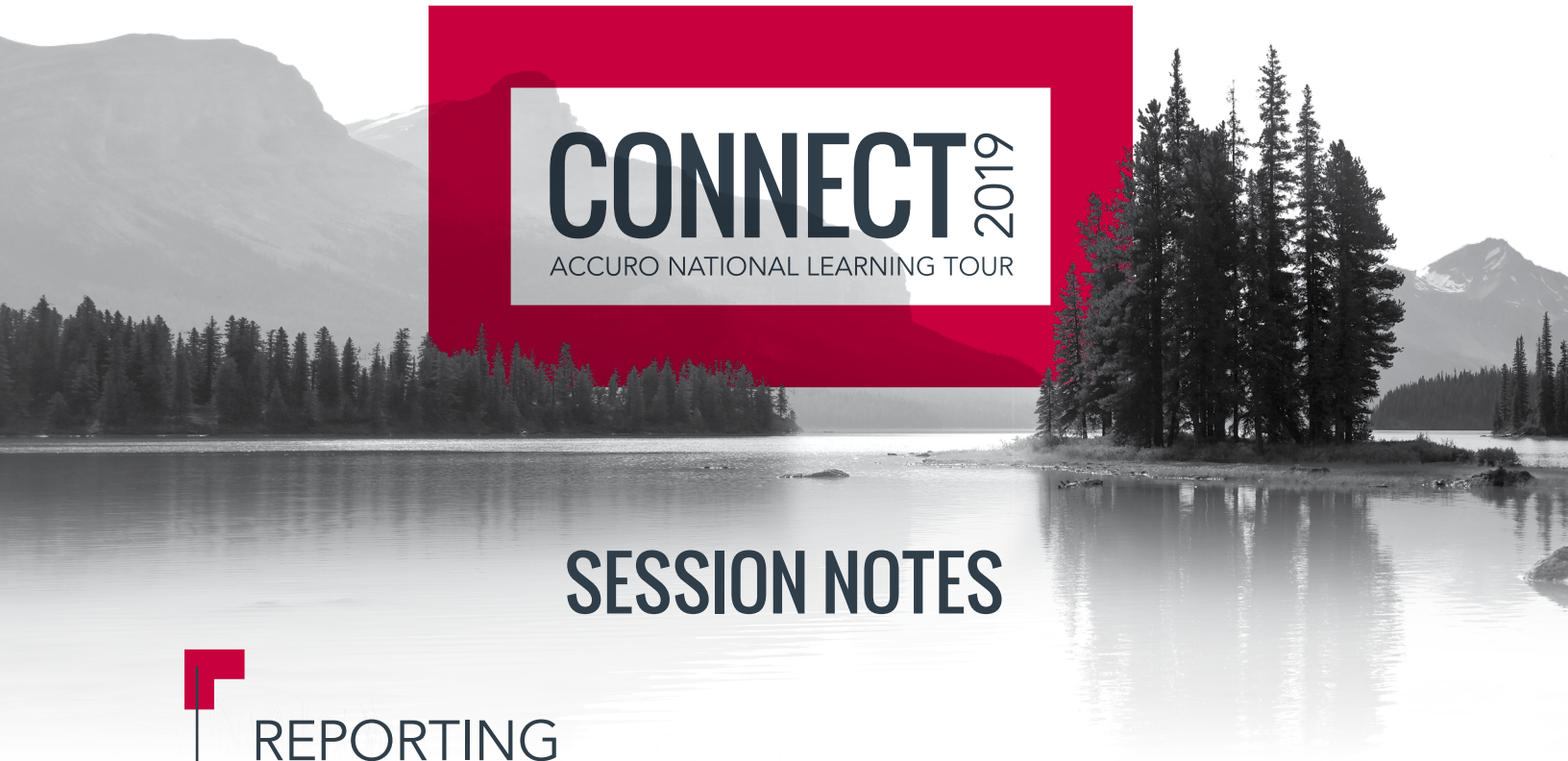


SESSION NOTES

REPORTING

Forms to Letters allow you to reduce the amount of typing/dictating required to efficiently create letters within Accuro. This feature translates checkboxes, and other form fields, into complete sentences so that your letters are comprehensive and done quickly.

LEARNING OBJECTIVES

- Generate a list of patients in Accuro by using the Query Builder
- Execute actions on the patient list
- Explore new reporting options available with Accuro EMR

QUERY BUILDER

Steps for Building a Query:

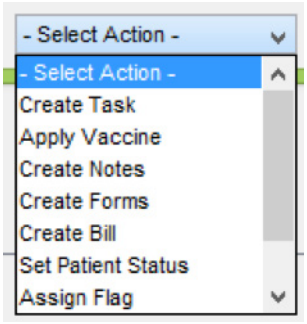
1. ALT + Search for "Query" in the Accuro Menu
2. Add button to create a new query – *Enter a name so you can find your query later*
3. Choose a Category – *where in the EMR is the information saved?*
4. Choose a Sub-Category - *narrow down to a specific item in the EMR*
5. Add new Constraints for your Rule (if necessary) - w*hat is it that you are exactly looking for?*
    - Choose your Rule Options
        - Doesn't Match
            - When checked, will apply the NEGATIVE of the rule selected

        - Rule shows up in red in the "Current Rule" area when selected, indicating the rule is negative
    - Patient Records Only
        - To eliminate multiple patient instances in your report, select this check box
    - Optional
        - This will bring in additional information without it being a requirement to return a result
        - EX. if you want the patient's email address to display in the result "if" available but to not have it as a constraint

6. Run the Report

ACTIONS TO APPLY TO YOUR REPORT

- Once your report is created, you can apply a number of actions
- To apply the action to the entire list:
    - Highlight the entire list by selecting the first line so that it's highlighted
    - Hold Ctrl key and press the letter "A"
    - Right Click or by Using the dropdown at the bottom, select the action you would like to apply



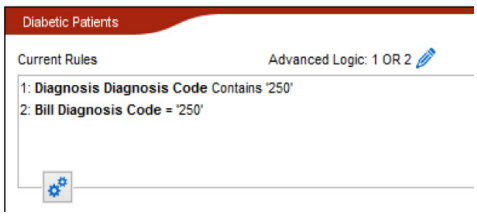
- **Create task:** allows you to create a task for EACH of the selected patients
- **Apply vaccine:** allows you to apply a vaccine to EACH of the selected patients into the Medical History Band for Immunizations
- **Create Notes:** when selected a pop up appears for you to choose the note template you would like. Enter in the note as you normally would, now this note is then saved to EACH of the patient's chart
- **Create Forms:** when selected a pop up appears for you to choose the form you would like, for which provider, if you want to print the form, save it to the patient's chart and / or mark the results as complete. Fill out the form as you normally would
- **Create Bill:** allows you to create a bill for EACH of the selected patients
- **Set Patient Status:** allows you to set patient status for EACH of the selected patients
    - Note: to create a custom status - patient section > status history tab > select pencil button in the bottom left corner > add a status
- **Assign Flag:** allows you to assign a flag for EACH of the selected patients
    - Note: Flags are icons that are visible in the patient status bar
        - To create a flag > select F7 > select new beside patient flags > select the manage button > select the add button to create the flag

- **Assign to a patient cohort:** allows you to assign a EACH of the patients to a cohort that already exists
- **Create Patient cohort:** allows you to create a cohort and automatically assigns the selected patients to the new cohort
- **Send Medeo Invitation/Add to Private Online Booking:** For sites with Online Booking only. Sends invites to all patients that have an email address with a link to access the Office's Online Booking page
- **Send Secure Message:** For sites with Patient Messaging only. Sends an email to all patients with an email address with a customized messaged. Recipients are automatically bcc'd

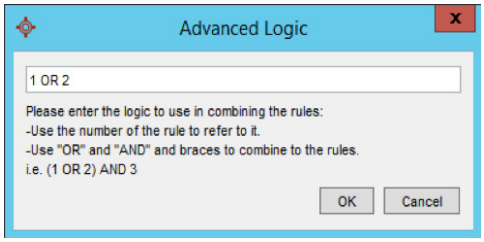
ADVANCED LOGIC

Connect multiple rules together by Boolean Logic. By default, Accuro connects multiple rules by "AND"

1. Options button
    - Check the "Use Advanced Logic" box > Select OK
2. There is now be a pencil above your Current Rules



3. Click on the pencil and enter in the advance logic in the space provided. Only the Boolean operators 'AND' or 'OR' may be used



ACCURO ANALYTICS

Watch the video introducing Accuro Analytics here - **https://vimeo.com/328705565**
Analytics helps you:

- Measure Efficiency
- Gain Billing Insights
- Increase Care