



Find Objects

This describes how to use the Find Objects window.

The Find Objects window is used to create queries and search for information on the database. The results of these queries can be used to analyse the organisation and its outputs. For example, the Find Objects window can be used to report on a list of all the female patients with asthma. The search can be refined by imposing certain conditions, so that only objects matching the conditions will be listed, and results limited to a specific number of items. The query results can be stored or exported to disk. Queries can also be imported and exported.

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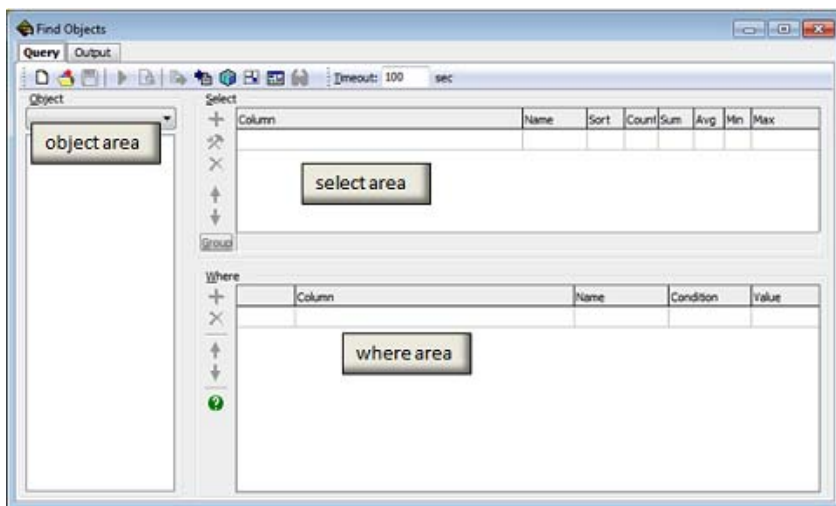
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Create query

This procedure describes how to create a query using the Find Objects window. The procedure describes all the steps you need to do to use all the functionality available in Find Objects; however, you may not always need to perform all the steps for all queries.




Step Action

- 1 Go to **Report / Find Objects** on the menu bar. The Find Objects window appears.
- 2 In the **Object** field, select the required object. All of the properties relating to that object will be displayed in a list of sub-folders below in alphabetic order.

Note: The number of properties available will vary depending on what view has been selected on the toolbar. Click  to change the view from simple mode to advanced mode, and vice versa.




- 3 Click on the required property and add it to the **Select** area by doing one of the following:

- click  in the **Select** area
- double-click on the property
- right-click on the property and select **Add to Select** from the pop-up menu
- drag and drop the property to the **Select** area

Note: Properties can only be selected from one folder according to context. You cannot mix properties from other folders as it will generate irrelevant data.

Tip: you can make the results of queries based on Appointments, Case, Referrals and Patients objects contextual by adding the relevant Reference number or ID to the 'Select' area. For example, if 'Filenum' is added to the 'Select' area of a query based on the Patient object, then you will be able to double-click on a patient in the results to open their Patient Register, or simply select the line and perform any relevant action directly for that patient by clicking on the relevant icon or menu option.


Selected properties in the **Select** area may be changed by using the buttons as follows:

-  delete selected property from list
-  move selected property up the list
-  move selected property down the list




4 Click in the **Sort** column next to the property in the **Select** area and select the required option from the drop-down list to specify what order the results should be displayed.

5 Tick the required grouping box(es). Those that are greyed out indicate that they are not available for the selected property.

6 In the **Object** area, search for the required property that you want to use to define your search criteria. Add it to the **Where** area by doing one of the following:

- click  in the **Where** area
- right-click on the property and select **Add to Where** from the pop-up menu
- drag and drop the property to the **Where** area

Selected properties in the **Where** area may be changed by using the buttons as follows:

-  delete selected property from list
-  move selected property up the list
-  move selected property down the list


7 Specify the required conditions and values in the **Where** area from the drop-down lists for the individual properties.

Tip: For most 'Where' conditions, you can enter the text **?ask?** into the 'Value' column. This will cause the system to ask you for the required value at runtime. In this way you can test a Find Objects query for multiple values without rewriting the query each time.

Tip: click  for tips on date parameters

Tip: Click  to see the SQL view of the query.

8 To limit the search to a specific number of results, enter the required amount in the **Limit to** field.

Click  to execute the search. The results appear in the **Output** tab.


9 In the **Title** field, enter an appropriate title for the query.

10 Click  to add and format a header to explain what the report shows.

11 Click  to specify the properties for a selected column as follows:

- **Column caption** - enter a new name for the column if required
- **Column type** - choose text, currency, quantity, date or use the default type by ticking **use default column type**
- **Justification** - choose, left, centre or right
- **Width** - enter the required width in millimetres, or tick **Auto Width**
- **Column calculations** - choose count, sum, average, minimum or maximum

Click **Update** when finished altering a column, and **OK** to close the window.


Click  to re-run the query if you have made changes to the columns properties. The query results will show with the new column settings.

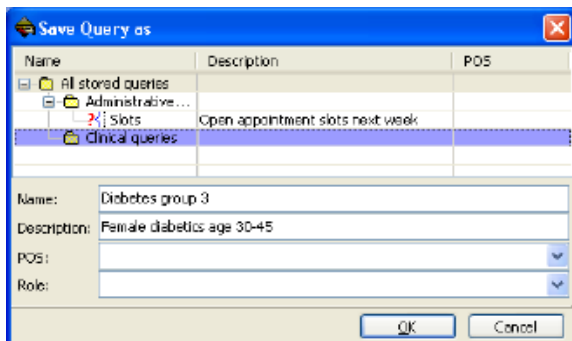
12 Click  to export the query to Microsoft Excel.

13 Click  to print the query results.

14 Check the **Direct to disk** box and click  again if you wish to save the query on disk.

Tip: You can also save query results to disk by clicking the 'Output' tab, then selecting **File / Save As...** from the main menu.

15 Click  on the Query tab to save the query definition. The 'Save Query As' window appears.



Note: Once a Find Objects query definition has been saved, it can be run by going to **Report / Stored Queries** on the menu bar.

- 16 Select the folder that the query is to be part of, if applicable.
- 17 In the **Name** field, enter the query name.
- 18 In the **Description** field, enter appropriate text.
- 19 If you wish this query to be available only to users that are members of a specific POS, select the required option from the drop-down menu in the **POS** field.
- 20 If you wish this query to be visible only to a particular organisational role, select that role in the **Role** field.

Note: If you yourself are not a member of the selected role, Profile will warn you that you will lose visibility of the query.

- 21 Click **OK**.

Tip: If the **FileNum** property is added to the 'Select' area of a query, then the resulting list can be used like a [Found List](#). See [Find patient](#) for more information. Similarly, if the **Refnum** property is added, when a line is selected in the results, it will set the case context. In other words, when clicking on any icon on the toolbar, or performing menu actions, it will be for the selected case, if relevant, or for the selected case patient.

Tip: If you only want to report on the most recent value of an HRI, refer to [Health Record Items \(HRI\) Report](#).






Query example

This procedure describes how to create a simple query to show the number of new patients registered in the last three months.

Step Action

- 1 Go to **Report / Find Objects** on the menu bar. The Find Objects window appears.
- 2 In the **Object** field, select **Patient**. All of the properties relating to patients will be displayed in a list of sub-folders in alphabetic order.

Note: The number of properties available will vary depending on what view has been selected on the toolbar. Click  to change the view from simple mode to advanced mode, and vice versa.

- 3 Locate the **Registration Date** property and add it to the **Select** area by doing one of the following:
 - click  in the **Select** area
 - double-click on the property
 - right-click on the property and select **Add to Select** from the pop-up menu
 - drag and drop the property to the **Select** area
- 4 Tick the **Count** box, next to the **Registration Date** property in the **Select** area.
- 5 Select the **Registration Date** property in the **Object** area and add it to the **Where** area by doing one of the following:
 - click  in the **Where** area
 - right-click on the property and select **Add to Where** from the pop-up menu
 - drag and drop the property to the **Where** area
- 6 In the **Condition** column for the **Registration Date** property in the

Where area, select the option 'is greater than' from the drop-down list.

7 In the **Value** column for the **Registration Date** property in the **Where** area, enter or [select](#) the required date.


8 In the **Object** area, search for the **Type** property and add it to the **Where** area using ones of the methods described in Step 5.


9 In the **Value** column for the **Type** property in the **Where** area, select 'Patient' from the drop-down list.

10 Click  to execute the search. The results appear on the Output tab.

11 Enter a title for the query in the **Title** field.

12 Click  to add and format a header to explain what the report shows.

13 Once you are satisfied that the query is producing the correct results, run the query again, this time with the **Direct to disk** option checked. This will open a Save window prompting where the results should be saved to, and in what format. The results can also be printed by clicking .

14 Click  on the Query tab to save the query. The Select a Query Name window appears. Enter a query name in the left field and a description of what it does in the right field. Click **OK**.

Note: once a Find Objects query has been saved, it can be run by going to Report / [Stored Queries](#) on the menu bar.

Note: All formats can be viewed with Microsoft Excel.



Create group query

Grouping queries enables the running of individual queries to be combined into a single process. This allows properties to be defined for some or all queries, as well as saving time in formatting reports. This procedure describes how to select the queries to be included in the group and set the properties of each.

Step Action

1 Go to **Report / Stored Queries** on the menu bar. The Stored Queries window appears.

2 Either:


- click  on the toolbar OR
- right-click on a query and select **New Group Query** from the pop-up menu

The Group Query window appears.




3 Enter a title for the group query in the **Title** field.

4 Click  to add and format a header to explain what the report shows.

5 Click on a query in the Individual Queries list and either:

- click  to add it to the group query Selected Queries list, or
- drag and drop the query to the Selected Queries list

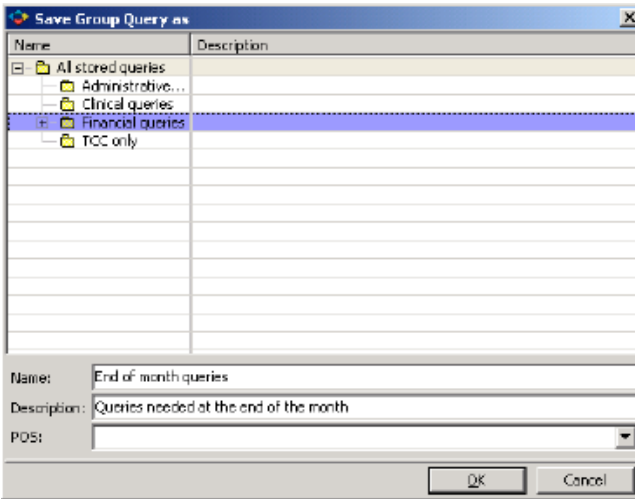
Queries in the Selected Queries list may be changed by using the buttons as follows:





-  delete selected query from list
-  move selected query up the list
-  move selected query down the list

6 For the selected query in the Selected Queries list, tick:

- **Title** - to include the individual query's title
- **Header** - to include the individual query's header
- **Page Break** - to insert a page break before the individual query

7 Click  to save the group query.



- 8 Select the folder that the group query is to be part of, if applicable.
- 9 In the **Name** field, enter the query name.
- 10 In the **Description** field, enter appropriate text.
- 11 Click **OK**.
- 13 Click . A new Group Query window appears listing the individual queries.
- 14 Click **Run Queries**. A tick appears next to each query as it has been completed, along with the number of objects that have been found.
- 15 Choose one of the following:
 - select an individual query in the list and click  to view results for that query only. These can be printed or saved
 - click  to save the group query
 - click  to print the group query results using the settings as specified in Step 6
- 16 Click **Close** and close the remaining windows.


Note: Queries should be placed in the order that they are to be run.



Run stored query

This procedure describes how to run a stored query that has been created using the [Find Objects](#) window.

- | Step | Action |
|------|--|
| 1 | Go to Report / Stored Queries on the menu bar. The Stored Queries window appears. |
| 2 | Click on the query you want to run. |

Tip: You can group queries into folders for convenience. Click , enter a folder name, select a POS if the folder is to be available only to members belonging to that POS, and click **OK**. You can drag and drop the relevant queries into this folder. Also see [Setting up stored queries structure](#) for more information.

- | | |
|---|--|
| 3 | Click  on the toolbar. The query results appears in a new window. |
|---|--|

Note: If a [group query](#) is being run, a Group Query window appears first. Click **Run Queries**. See [Create group query](#) for more information.




Import query

This procedure describes how to import a query from the Stored Queries window. Queries can also be imported using the Find Objects window.

- | Step | Action |
|------|--|
| 1 | Go to Report / Stored Queries on the menu bar. The Stored Queries window appears. |

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- 2 Click  on the toolbar. The Import from file window appears.
- 3 Click on the file and then click **Open**. The Select a Query Name window appears.
- 4 Enter a query name in the left field and a description of what it does in the right field. Click **OK**.

Note: Before you start the import, ensure that the files you wish to import are in a form accessible by your computer, for example, CD, floppy disk, etc.



Export a query

This procedure describes how to export a query from the Find Objects window.

- | Step | Action |
|------|--|
| 1 | Go to Report / Stored Queries on the menu bar. The Stored Queries window appears. |
| 2 | Click on the query you want to export. |
| 3 | Click  on the toolbar. The Export to file window appears. |
| 4 | Select the the appropriate folder or disk drive and enter the file name. Click Save . |


Note: Queries can also be exported using the Find Objects and the Group Query windows.

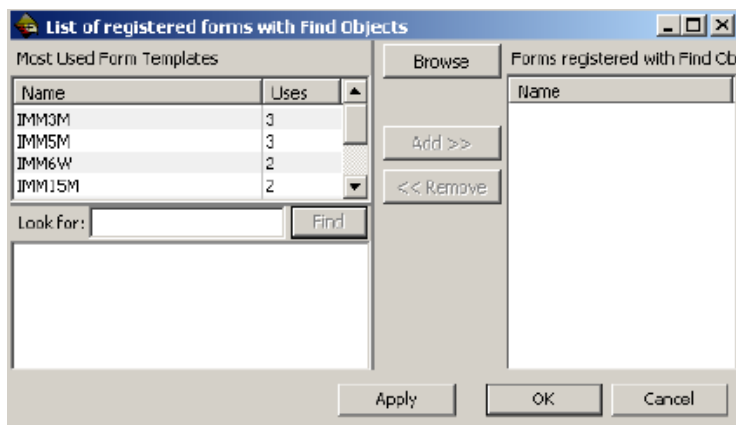


Register forms with find objects

The best way to find data entered using forms, is to register the form in find objects first, then set up the query.

Step Action

- 1 Go to **Report / Find Objects** on the menu bar. The Find Objects window appears.
- 2 Click **Maintain list of registered forms** . The **List of registered forms with Find Objects** window appears.



- 3 Select the form you wish to register by using any of the following methods:
 - select it from the Most Used Form Templates, if available
 - type a key word in the **Look for** field, click **Find** then select it from the search results list below
 - click **Browse** and select it from the **Exploring** window (skip next step if using this method)
- 4 Click **Add** or drag and drop it into the **Forms registered with Find Objects** area.
- 5 Click **Apply** and repeat steps 3 and 4 to register other forms.
- 6 Click **OK** when you have finished registering all the forms.

You can now create queries specific to the forms you have registered. An Object called **Form (Registered)** will have been created, with the registered form(s) appearing as a subfolder. The Patient object will also have a **Form (Registered)** subfolder, with the registered form(s) appearing under it. See [Create query](#) for more information on how to set up a Find Objects query.

Note: if you have saved a Find Objects query for a specific form as a stored query, you will be able to unregister the form and still run the stored query. To unregister a form, simply select it in the **List of registered forms with Find Objects** window and click **Remove**.



Work Centre Groups

The **Groups** view in the Work Centre is used to maintain, view and use patient groups. Patient groups can then be analysed in the [Incidence](#), [Prevalence](#), [Quality Indicators](#), and [Care Plan Analysis](#) views of the **Clinical** segment of the Work Centre. The groups listed in the view are those meeting the criteria specified in the selected [filter](#).

Groups can be of two types:

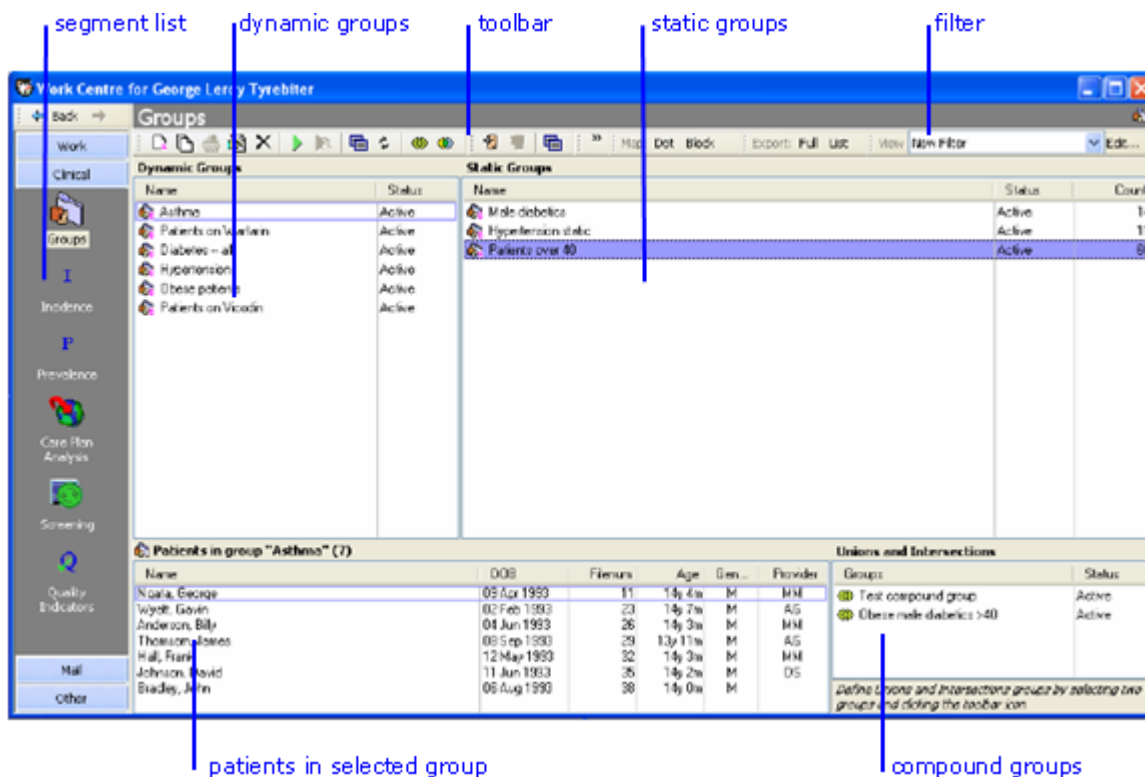
- **Static:** in these groups, patients are added and removed manually. An example could be a group of patients at a Rest Home.
- **Dynamic:** in these groups, patients are automatically added or removed using rules, for example 'all my patients with diabetes' or 'all male patients over 60'.

You can also build [compound groups](#) based on two or more existing patient groups.

Refer to [Setting up patient groups](#) for information on how to create and alter static and dynamic patient groups.

Open this view by clicking **Groups** under the **Clinical** segment in the Segment List.

Select a group and click  to display patients belonging to it in the bottom panel.



The screenshot shows the 'Work Centre for George Leroy Tyrebitter' interface. The 'Groups' view is active, displaying two main sections: 'Dynamic Groups' and 'Static Groups'. The 'Dynamic Groups' section lists groups like 'Asthma', 'Patients on Warfarin', 'Diabetes - all', 'Hypertension', 'Diabetic patients', and 'Patients on Vicodin'. The 'Static Groups' section lists 'Male diabetics', 'Hypertension static', and 'Patients over 40'. A toolbar at the top contains various icons for group management. Below the group lists, there are two detailed views: 'Patients in group "Asthma" (7)' and 'Unions and Intersections'. The 'Patients in selected group' view shows a list of patients with columns for Name, DOB, File no., Age, Gen., and Provider. The 'Unions and Intersections' view shows compound groups like 'Test compound group' and 'Obese male diabetics >40'. Labels with blue lines point to the 'segment list', 'dynamic groups', 'toolbar', 'static groups', 'filter', 'patients in selected group', and 'compound groups'.

Main Features

The **Dynamic Groups** area lists all current dynamic groups, and shows the status of the group.



The **Static Groups** area lists all current static groups, their status and the number of patients included in the group.















The **Patients in selected group** area lists all patients belonging to the selected group, their file number, date of birth, age and gender. Right-click on a patient to display a pop-up menu with relevant options. When a patient is selected, you can undock it. Functions within the undocked list allow you to add a problem or care plan to multiple patients at once.

The **Unions and Intersections** area lists all compound groups and their status. See [Adding and altering compound patient groups](#) for more information.



The **Toolbar** buttons allow you to:

Tip: Click anywhere in the appropriate area to enable relevant icons. For example, click anywhere in the Static Groups area to enable the **Add new static group** icon.

-  [create a new dynamic group](#)
-  [create a new static group](#)

-  duplicate the selected group
-  edit the group rule of the selected [dynamic](#) or [compound](#) group
-  rename the selected group
-  delete the selected group
-  recalculate the membership of a dynamic group; note that this could take a while if your patient database is large
-  recalculate the membership of a dynamic group and build a static group from them
-  undock the selected group, to add a problem, care plan etc. across multiple patients -- *see below*
-  refresh the view
-  [create a new union group](#) from two selected groups
-  [create a new intersection group](#) from two selected groups
-  [add a patient to a static group](#)
-  [remove a patient from a static group](#)
-  undock the loaded list -- see below for more information
-  export the properties of the selected dynamic group

Note: This exports the properties of the dynamic group definition, not its members. See below for exporting the list of member patients. You can also export the definition of a compound group provided that it is based exclusively on dynamic groups.

-  import the properties of a dynamic group
- [map](#) patients' addresses as dots on a map
- [map](#) patients' addresses as coloured blocks on a map
- export the full list of patients
- export the list of patients displayed
-  select a [filter](#) to display the relevant groups
- [edit existing filters](#) or add new ones

Note: To be able to map patients' addresses, you will need to have some mechanism to [geocode](#) addresses, and then buy the appropriate map. [Contact us](#) for more information.

Undocked view of a patient group

You can "undock" a dynamic or static patient group from the Work Centre Groups view; this will place the group in its own window, with additional toolbar functionality.

To undock a group, highlight it in the Work Centre Groups view and click .

Note: This icon appears only if the 'Allow form undocking' box in the [Workspace preferences](#) is checked.

Patient	FileNum	DOB	Age	Gender	Comment
<input type="checkbox"/> Brar, Stephen Paul	4871	17 Aug 1945	62y 0m	M	
<input checked="" type="checkbox"/> Brar, Stephen M	4885	29 Sep 1970	36y 10m	M	
<input checked="" type="checkbox"/> Brasnett, Stephen J	4899	24 Sep 1928	78y 10m	M	
<input type="checkbox"/> Brayfield, Stephen	4933	21 Jan 1936	71y 6m	M	
<input type="checkbox"/> Breais, Stephen	4941	04 Apr 1938	69y 4m	M	
<input checked="" type="checkbox"/> Bresch, Stephanie N	4977	19 Jan 1943	64y 6m	F	
<input checked="" type="checkbox"/> Brice, Stephanie	5011	17 Aug 1930	77y 0m	F	
<input checked="" type="checkbox"/> Broad, Stanley J	5067	04 Apr 1926	81y 4m	M	
<input type="checkbox"/> Brown, Spencer	5177	06 May 1942	65y 3m	M	
<input type="checkbox"/> Brown, Sophia M	5193	27 Dec 1953	53y 7m	F	
<input checked="" type="checkbox"/> Brown, Sonia C	5241	26 Nov 1949	57y 8m	F	
<input type="checkbox"/> Brown, Sonda Lee-Ann	5247	04 Mar 1947	60y 5m	F	
<input checked="" type="checkbox"/> Brown, Simone Anita	5255	08 Jun 1938	69y 2m	F	

Each patient in the group has a checkbox next to the name. Operations can be performed en masse for all ticked patients.

The **Toolbar** enables the following functions:

- tick all the checkboxes
- untick all the checkboxes
- toggle the highlighted patient(s) between ticked and unticked
- **Add Problem** add a new [problem](#) to all ticked patients;

The down-arrow allows the following choices as to the type of problem to add:

- **Diagnosis**
- **Adverse reaction**
- **Procedure**
- **Social/Risk**
- **Administrative**
- **Add Alert** add an [alert](#) to all ticked patients
- **Add Care Plan** enroll all ticked patients in a [care plan](#)
- **Add Intervention** add an [intervention](#) to all ticked patients
- refresh the list

Note: Refreshing the list will untick all checkboxes. For a dynamic group, it will also recalculate the group membership.



Filter patient groups

This topic describes each field within the Patient Groups Filters window, which is a filter shared by two views:

- the [Groups view](#) in the Work Centre, Clinical segment
- the [Groups view](#) in the Patient Register

Note: Refer to [Setting up filters](#) for general information about working with filters.

Filters are user or role-specific, depending on your set up. You may be able to only view filter settings, or alter them as well, as required, depending on whether the 'Allow Edit Filters' action is granted for at least one of your [roles](#).

To open the filter window

- | Step | Action |
|------|---|
| 1 | Open the Work Centre at the Clinical segment or the Patient Register for any patient. |

- 2 Click **Groups** in the segment list.
- 3 Click **Edit** beside the **View** field. The **Patient Groups Filter** window appears.

- 4 View or [edit the filter](#), as appropriate. Refer to field description below for information on each setting.
- 5 Click **Close** to close the window, or **Apply** to save your changes, apply the current filter and close.

Field	Description
View Description	Name given to identify the filter. It needs to be as descriptive as possible to be easily identified from a drop-down list.
Privacy	Select the appropriate radio button. Select: <ul style="list-style-type: none"> ■ Private and Shared to display both private and shared groups ■ Private Only to only display private groups ■ Shared Only to only display shared groups <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: Only groups that are private to this user will be visible. In other words, groups that are private to a specific provider will only ever be able to be seen by that provider, as long the appropriate radio button is selected.</p> </div>
Group Status	Check the required box(es) to specify the status of the groups that should be displayed on the list, when this filter is selected.
Provider is	Select from the drop-down list if you wish to limit the display of patients in a group to those whose main provider is specified here. Select: <ul style="list-style-type: none"> ■ any to display all patients in the group ■ me to display only your own patients ■ in group to display only patients "owned" by providers belonging to a specified provider group ■ is to display only patients "owned" by a specific provider <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: When choosing in group or is, an adjacent field will appear in which you must specify the provider or provider group in question.</p> </div>
Display the patients if there	Enter the required value. If the number of patients in a group exceeds the value specified here, the patients will not be displayed in the bottom panel of the

are fewer than Groups view.

Columns Check the boxes next to those columns that you wish to appear when displaying patients in a group. You can also control the order in which the selected columns display:



moves the column up the list (and to the left in the display)



moves the column down the list (and to the right in the display)

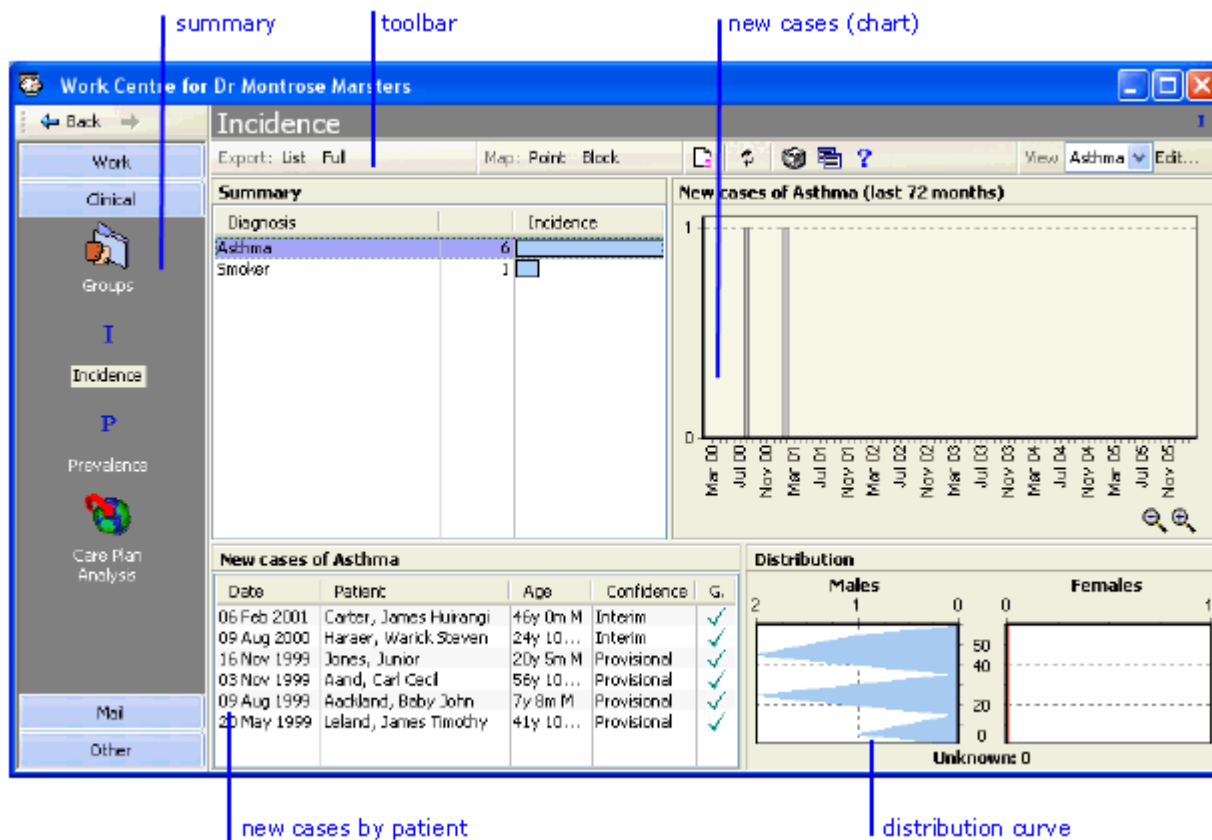


Work Centre Incidence

In this view, you can track new diagnoses made within disease profiles, graph these over time and, with a single click, list all the patients.

Open this view by clicking **Incidence** in the **Clinical** segment in the segment list.

The information showing in this view will vary depending on the [filter](#) selected.



The **Summary** lists the diagnoses analysed, as specified in the [filter](#), with the highest at the top. The columns in this area display:

- diagnosis description
- number of new cases, or a rate of incidences calculated over a population denominator specified in the filter (eg. 0.028 per 1000 people)
- a graph of the diagnoses.

In the **New Cases (chart)** area, the incidences for the selected problem are shown as a chart over the period of time specified in the filter.

The **New cases by patients** area lists patients for the selected diagnosis. If a block in the chart is selected, then the list shows the patients for the selected problem in the selected block. The columns in this area display:





- date of the diagnosis
- patient's name
- patient's age
- confidence of the diagnosis, ie. Interim, Provisional or Definitive
- whether the patient is geocoded or not

Tip: select the required patients in this area, right-click and select **Make Static Group** to [add a static group](#) containing the selected patients.

In the **Distribution Curve** you can view the incidence of the problem by age and / or gender, as determined in the filter.

The **Toolbar** allows you to:

- export the patient list
- export the entire item
- [map](#) patients' addresses as dots on a map
- [map](#) patients' addresses as coloured blocks on a map
- [make a static group](#)

-  refresh the view
-  print the selected view
-  show a help hint
-  undock the loaded list (by clicking on this icon and then clicking once anywhere in the screen)
- select a filter to display the relevant information
- edit existing [filters](#) or add new ones

Note: the **Undock Form** icon  only appears if the 'Allow form undocking' box in the [Workspace preferences](#) is checked.

Note: to be able to map patients' addresses, you will need to have some mechanism to geocode addresses, and then buy the appropriate map. [Contact us](#) for more information.

Note: your disease codes need to be linked to a term set for this view to work as described. See [Setting up disease codes](#) for information on how to link disease codes to a term set.



Filter Work Centre Incidence

This topic describes each field within the [filter](#) window for the [Work Centre, Clinical, Incidence](#) view. The information showing in this view will vary depending on the filter selected.

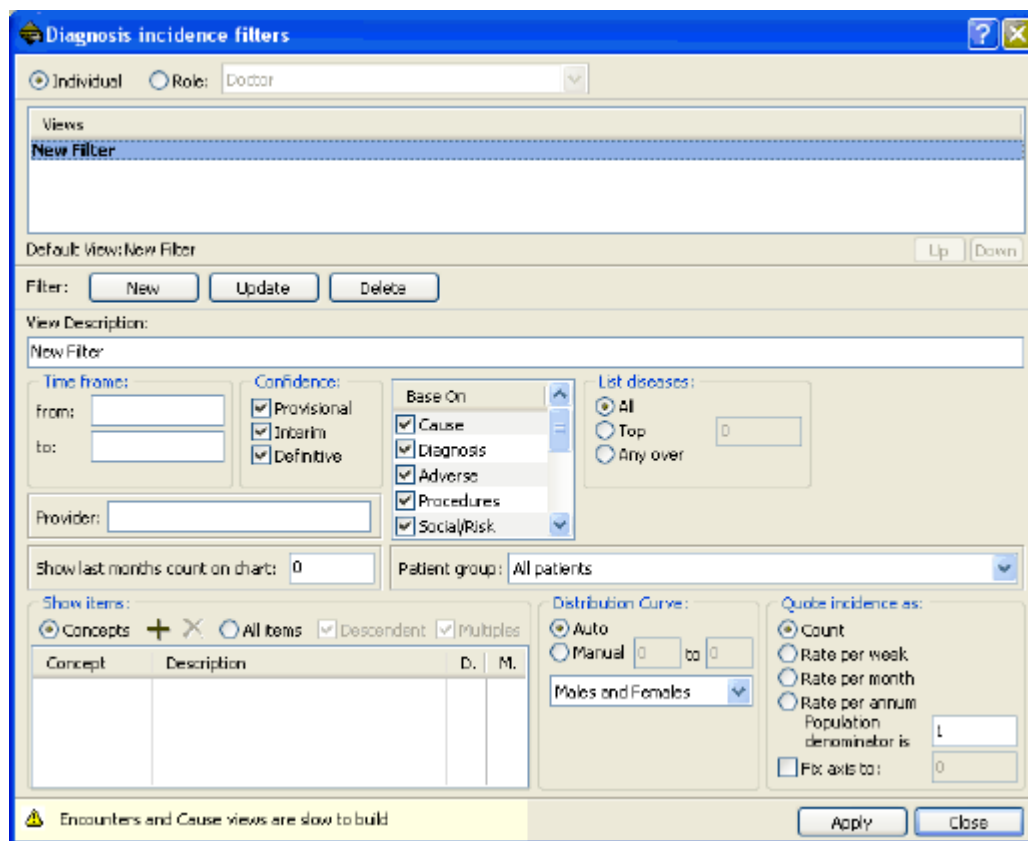
Note: Refer to [Setting up filters](#) for general information about working with filters.

Filters are user or role-specific, depending on your set up. You may be able to only view filter settings, or alter them as well, as required, depending on whether the 'Allow Edit Filters' action is granted for at least one of your [roles](#).

To open the filter window

Step Action

- 1 Go to **Organisation / Work Centre** on the menu bar.
- 2 Click **Incidence** under the **Clinical** segment in the segment list.
- 3 Click **Edit** beside the **View** field. The **Diagnosis incidence filters** window appears.



- 4 View or [edit the filter](#), as appropriate. Refer to field description below for information on each setting.
- 5 Click **Close** to close the window, or **Apply** to save your changes, select the current filter and close.

Field Description

- View Description** Name given to identify the filter. It needs to be as descriptive as possible to be easily identified from a drop-down list.
- Time frame** Specify the time frame that you want the filter to look at by selecting a **From** and **To** date from the calendar, if you wish to limit the data by date. If these fields are left blank, no date limitations will apply.
- Confidence** Check one or two boxes if you only want to view [problems](#) that have a specific confidence level, when this filter is selected. If none of the boxes are checked, the **Confidence** field of problems will be ignored.
- Base on** Tick the appropriate boxes to determine what the incidence of problems should be based on. Options are:


Option	Found in
Cause	Encounter properties , Cause field
Diagnosis, Adverse, Procedures, Social / Risk, Administrative	Patient's problem list (of relevant type)
Case	Case window, Diagnosis field
Encounters	Contact properties , Diagnosis field

For example, if only the 'Encounters' box is checked, then only encounters coded with the problem will be taken into account. If the problem was only added to the problem list as a problem of any type, then it will be disregarded. Please note that the more boxes you tick the slower it will be to load the list when this filter is selected, especially if one of the boxes checked is 'Encounters' .

Note: The system will only look at problems linked to a term set. See [Select Disease Code](#) for more information.

- Provider** Search for and select a provider or a group of providers, if you only want to view patients whose usual provider is specified in this field. Options are:
- **All** for all patients regardless of provider
 - **Group** for patients belonging to members of the [provider group](#) specified in the adjacent field
 - **Only** for patients belonging to the single provider specified in the adjacent field
 - **Me** for your patients only
 - **Me and group** for patients belonging to you or to anyone in the provider group specified in the adjacent field
- List diseases** Select the appropriate radio button. Select:
- **All** to report on all problems
 - **Top** to report on the number of most used problems specified in the adjacent field
 - **Any over** to only report on problems that have been used at least the number of times specified in the adjacent field
- Show last months count on chart** Enter the number of months that you wish to display on the chart showing the new cases of the selected problem.
- Patient group** Select the appropriate group from the drop down menu. Select:
- **All Patients** if you want to report on the incidence of problems across all patients
 - Any other option, if you only want to report on the incidence of problems across the specified [patient group](#)

Note: Patient groups are user and/or organisation specific. For more information see [Work Centre Groups](#). Additionally, preferences determine which types of groups and with which status will be available for selection from this drop-down menu. See Patient Preferences Other tab for more information.

- Show Items** Select the appropriate radio button. Select:
- **Concepts** and add the relevant item(s) to look at specific diseases.
Diseases are chosen from [termsets](#); click on  to bring up a [Term Selector](#) window.
 - **All items** to look at all items (or, rather, all those that meet the criteria specified in **List diseases**).
- You can further specify these radio buttons, by ticking the appropriate column (s) on the appropriate line(s), if the **Concepts** radio button is selected, or by checking the appropriate boxes, if **All items** is selected.
- Descendents (D)**, if the box is checked, or the column ticked, it will look at all descendent disease codes if the term set has a hierarchical structure.
- Multiples (M)**, if the box is checked, or the column ticked, it will count the prevalence of the problem as many times as the problem is added to the patient. If unchecked, the problem will only be counted once for the same patient, even if the problem is added to the patient list or an encounter coded with it several times.

Tip: Loading the view will be considerably faster if **Descendents** are not included.

- Distribution curve** Select the appropriate radio button. Select:
- **Auto** to let the distribution curve be calculated automatically
 - **Manual**, if you wish to define the distribution curve for:
 - patients' minimum and maximum age, as specified in the boxes provided
 - gender, as selected from the drop-down menu

Note: when **Auto** is selected, patients' ages are rounded down to the nearest decade for the youngest, and up to the nearest decade for the oldest.

- Quote incidence as** Select the appropriate radio button. Select:
- **Count** to provide a sum of all incidences

- **Rate per week** to provide a rate of new incidences of the problem per week
- **Rate per month** to provide a rate of new incidences of the problem per month
- **Rate per annum** to provide a rate of new incidences of the problem per annum

Also enter the required information in the next two fields, if required:

- **Population denominator:** if you leave it as 1, the number of incidences shown in the Summary area of the view will be absolute, eg. 28. If you specify a denominator, the number will represent a percentage over the number specified here. For example, if you enter '1000' here, the number in the Summary will be '0.028' .
- Check the **Fix axis** box and specify a value if you only want to display the incidence up to a specific number.

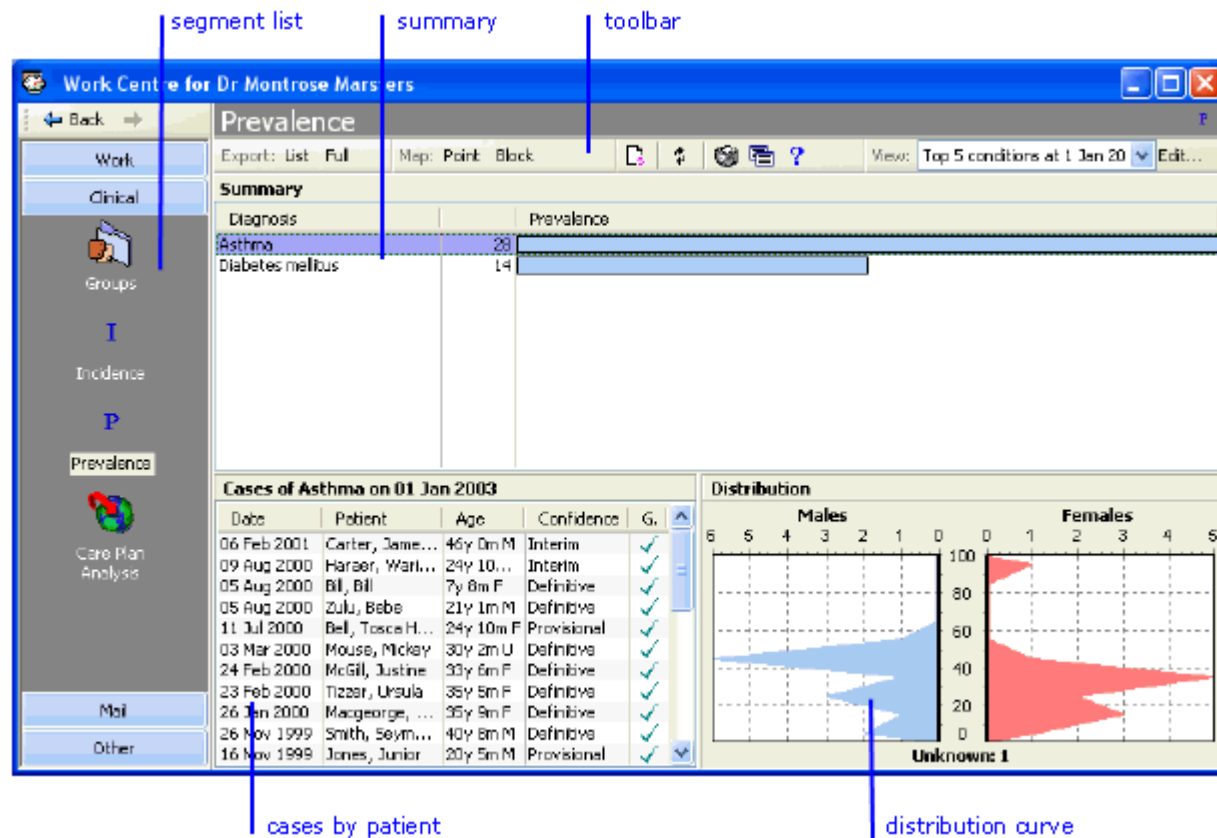


Work Centre Prevalence

In this view, you can track the prevalence of specified diseases at any point in time and report the rate in various ways.

Open this view by clicking **Prevalence** in the **Clinical** segment in the segment list.

The information showing in this view will vary depending on the [filter](#) selected.



Main Features

The **Summary** lists the diagnoses analysed, as specified in the [filter](#), with the most prevalent diagnosis at the top. The columns in this area display:

- diagnosis description
- number of cases at the date specified in the filter, or a rate of incidences calculated over a population denominator specified in the filter (eg. 0.030 per 1000 people)
- a graph of the diagnoses.

The **Cases by patient** area lists patients for the selected diagnosis, at the date specified in the filter. The columns in this area display:





- date of the diagnosis
- patient's name
- patient's age
- patient's usual provider
- confidence of the diagnosis, ie. Interim, Provisional or Definitive
- whether the patient is geocoded or not

Tip: select the required patients in this area, right-click and select **Make Static Group** to [add a static group](#) containing the selected patients.

In the **Distribution Curve** you can view the prevalence of the problem by age and / or gender, as determined in the filter.

The **Toolbar** allows you to:

- export the patient list
- export the entire item
- [map](#) patients' addresses as dots on a map
- [map](#) patients' addresses as coloured blocks on a map
- [make a static group](#)

-  refresh the view
-  print the selected view
-  show a help hint
-  undock the loaded list (by clicking on this icon and then clicking once anywhere in the screen)
- select a filter to display the relevant information
- edit existing [filters](#) or add new ones

Note: the **Undock Form** icon  only appears if the 'Allow form undocking' box in the [Workspace preferences](#) is checked.

Note: to be able to map patients' addresses, you will need to have some mechanism to geocode addresses, and then buy the appropriate map. [Contact us](#) for more information.

Note: your disease codes need to be linked to a term set for this view to work as described. See [Setting up disease codes](#) for information on how to link disease codes to a term set.



Filter Work Centre Prevalence

This topic describes each field within the [filter](#) window for the [Work Centre, Clinical, Prevalence](#) view. The information showing on this view will vary depending on the filter selected.

Note: Refer to [Setting up filters](#) for general information about working with filters.


Filters are user or role-specific, depending on your set up. You may be able to only view filter settings, or alter them as well, as required, depending on whether the 'Allow Edit Filters' action is granted for at least one of your [roles](#).

To open the filter window

Step Action

- 1 Go to **Organisation / Work Centre** on the menu bar.
- 2 Click **Prevalence** under the **Clinical** segment in the segment list.
- 3 Click **Edit** beside the **View** field. The **Diagnosis Prevalence filters** window appears.

- 4 View or [edit the filter](#), as appropriate. Refer to field description below for information on each setting.
- 5 Click **Close** to close the window, or **Apply** to save your changes, select the current filter and close.

Field	Description										
View Description	Name given to identify the filter. It needs to be as descriptive as possible to be easily identified from a drop-down list.										
Date	The date for which you want to see the prevalence. If left blank, it will by default look at today's date.										
Confidence	Check one or two boxes if you only want to view problems that have a specific confidence level, when this filter is selected. If none of the boxes are checked, the Confidence field of problems will be ignored.										
Base on	<p>Tick the appropriate boxes to determine what the prevalence of problems should be based on. Options are:</p> <table border="0" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">Option</th> <th style="text-align: left;">Found in</th> </tr> </thead> <tbody> <tr> <td>Cause</td> <td>Encounter properties, Cause field</td> </tr> <tr> <td>Diagnosis, Adverse, Procedures, Social / Risk, Administrative</td> <td>Patient's problem list (of relevant type)</td> </tr> <tr> <td>Case</td> <td>Case window, Diagnosis field</td> </tr> <tr> <td>Encounters</td> <td>Contact properties, Diagnosis field</td> </tr> </tbody> </table> <p>For example, if only the 'Encounters' box is checked, then only encounters coded with the problem will be taken into account. If the problem was only added to the problem list as a problem of any type, then it will be disregarded. Please note that the more boxes you tick the slower it will be to load the list when this filter is selected, especially if one of the boxes checked is 'Encounters' .</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: The system will only look at problems linked to a term set. See Select Disease Code for more information.</p> </div>	Option	Found in	Cause	Encounter properties , Cause field	Diagnosis, Adverse, Procedures, Social / Risk, Administrative	Patient's problem list (of relevant type)	Case	Case window, Diagnosis field	Encounters	Contact properties , Diagnosis field
Option	Found in										
Cause	Encounter properties , Cause field										
Diagnosis, Adverse, Procedures, Social / Risk, Administrative	Patient's problem list (of relevant type)										
Case	Case window, Diagnosis field										
Encounters	Contact properties , Diagnosis field										
List diseases	<p>Select the appropriate radio button. Select:</p> <ul style="list-style-type: none"> ■ All to report on all problems ■ Top to report on the number of most used problems specified in the adjacent field ■ Any over to only report on problems that have been used at least the number of times specified in the adjacent field 										
Quote prevalence as	<ul style="list-style-type: none"> ■ Population denominator: if you leave it as 1, the number of prevalences shown in the Summary area of the view will be absolute, eg. 28. If you specify a denominator, the number will represent a percentage over the number specified here. For example, if you enter '1000' here, the number in the Summary will be '0.028' ■ Fix axis to: Check this box and specify a value if you only want to display the prevalence up to a specific number. 										
Patient group	<p>Select the appropriate group from the drop down menu. Select:</p> <ul style="list-style-type: none"> ■ All Patients if you want to report on the prevalence of problems across all patients ■ Any other option, if you only want to report on the prevalence of problems across the specified patient group <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Note: Patient groups are user and/or organisation specific. For more information see Work Centre Groups. Additionally, preferences determine which types of groups and with which status will be available for selection from this drop-down menu. See Patient Preferences Other tab for more information.</p> </div>										
Show Items	<p>Select the appropriate radio button. Select:</p> <ul style="list-style-type: none"> ■ Concepts and add the relevant item(s) to look at specific diseases. <p>Diseases are chosen from termsets; click on  to bring up a Term Selector window.</p> <ul style="list-style-type: none"> ■ All items to look at all items (or, rather, all those that meet the criteria 										

specified in **List diseases**).

You can further specify these radio buttons, by ticking the appropriate column (s) on the appropriate line(s), if the **Concepts** radio button is selected, or by checking the appropriate boxes, if **All items** is selected.

Descendents (D), if the box is checked, or the column ticked, it will look at all descendent disease codes if the term set has a hierarchical structure.

Multiples (M), if the box is checked, or the column ticked, it will count the prevalence of the problem as many times as the problem is added to the patient. If unchecked, the problem will only be counted once for the same patient, even if the problem is added to the patient list or an encounter coded with it several times.

Tip: Loading the view will be considerably faster if **Descendents** are not included.

Distribution curve

Select the appropriate radio button. Select:

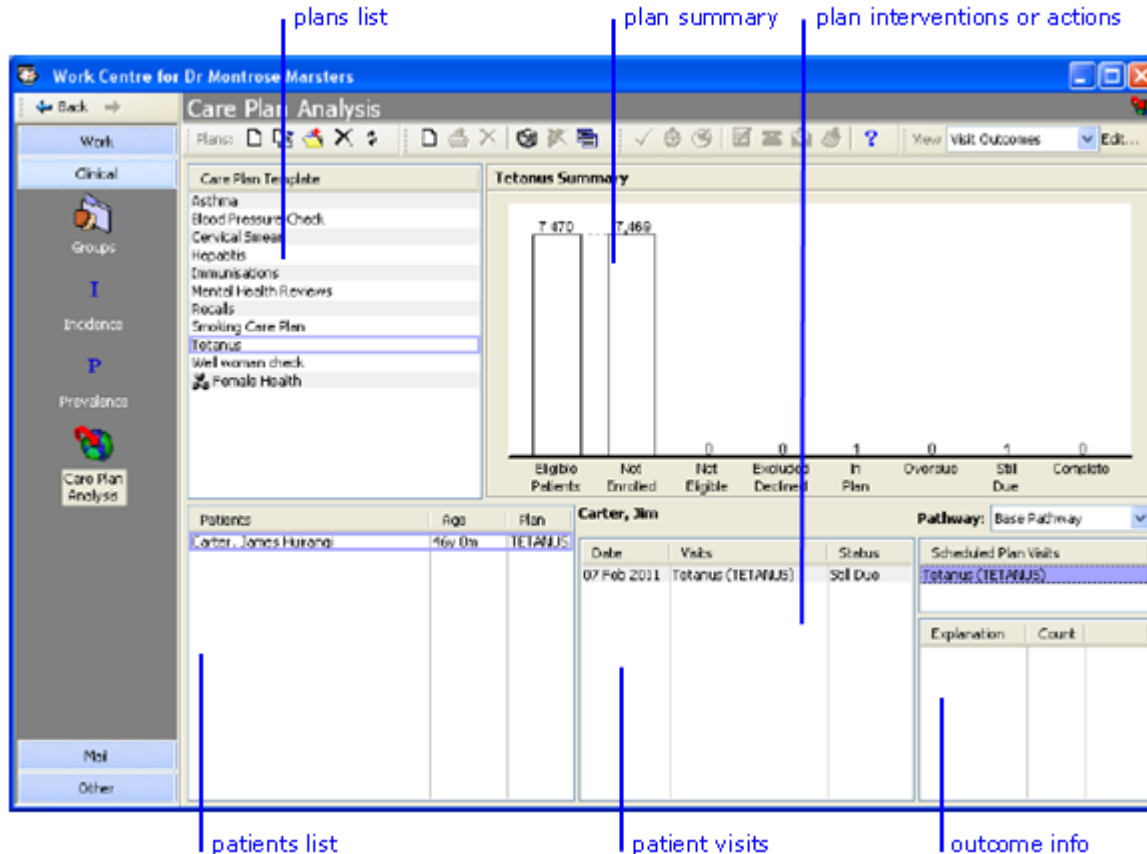
- **Auto** to let the distribution curve be calculated automatically
- **Manual**, if you wish to define the distribution curve for:
 - patients' minimum and maximum age, as specified in the boxes provided
 - gender, as selected from the drop-down menu

Note: when **Auto** is selected, patients' ages are rounded down to the nearest decade for the youngest, and up to the nearest decade for the oldest.



Work Centre Care Plan Analysis

This view provides a graphical representation of the status of the patients and population-level enrollment for a given [care plan](#) or [care plan group](#). The data displayed on this view depends on the selected [filter](#).



The **Plan List** displays all [care plans](#) or [care plans groups](#) (these are preceded by a icon).

The **Plan Summary** displays information based on the care plan or care plan group selected on the left. A description of each block in the diagram is provided below.

The **Patient List** displays all patients included in the selected block in the diagram.

Tip: Select the required patients in this area, right-click and select **Make Static Group** to [add a static group](#) containing the selected patients.

The **Patient Visits** area displays information relating to the plan interventions for the patient selected on the left. Double-click on an intervention to open it for editing.

A list of relevant pathways for the selected plan is available in the Pathways drop-down menu.

The **Plan Interventions or Actions** area displays either the interventions or actions as set up in the selected care plan. The [filter](#) determines whether it is the interventions or the actions that are displayed, and the area caption changes accordingly.

When an intervention or action is selected in the Plan Interventions or Actions area, outcome information is displayed in the **Outcome Info** area for patients in the In Plan block. All available outcomes for the selected plan are listed, and a number of usages for each is provided, as well as a graph, to quickly view which outcomes occur most frequently.

Block	Description
Eligible Patients	Patients that could potentially be enrolled in the care plan or in any plan of the care plan group. The system looks at the screening rule in the Screening tab of the care plan to calculate this.
Not Enrolled	Patients that are considered eligible but are not enrolled in the plan.
Not Eligible	Patients enrolled in the care plan but that are NOT included in the eligible patients list or, for care plan groups, patients who are not eligible for any plans in the group, but who nevertheless have at least one member plan.

Note: the filter further defines which patients to display. See [Filter Work Centre Care Plan Analysis](#) for more information.

Excluded Declined

Patients enrolled in the plan or plan group, where the plan status (or at least one plan member of the group) is Excluded or Declined.

Note: columns from 'Eligible Patients' to 'Excluded Declined' are ignored for a care plan group or for a care plan that is enabled to be applied to the same patient more than once (see [Care Plan - plan tab](#) for more information).

In Plan

Patients enrolled in the plan, where the plan status IS NOT Excluded or Declined. For care plan groups, these are the patients who have all member plans in the group, and for whom no member plan is marked as Declined or Excluded.

These are effectively the patients being tracked on the plan.

Overdue

Patients that are part of the In Plan block and have at least one intervention that is in Still Due or Incomplete status and whose visit date is before today.

Still Due

Patients that are part of the In Plan block and have at least one intervention that is in Still Due or Incomplete status but none of the dates of these still due or incomplete interventions are before today.

Complete

Patients that are part of the In Plan block who have no interventions designated as Still Due or Incomplete.

Toolbar buttons become enabled when the relevant item is selected in the view.

- Select a patient for the toolbar actions related to the plan to be enabled.
- Select an intervention in the **Patient Visits** area for the toolbar actions related to the intervention to be enabled.

The **Toolbar** allows you to:

-  enroll in a new plan
-  close the selected plan
-  alter the selected plan
-  delete the selected plan
-  add a new intervention to the selected plan
-  alter the selected intervention
-  delete the selected intervention
-  refresh the view
-  print the selected care plan
-  complete the selected intervention
-  defer the selected intervention
-  add a missing history summary for the selected plan
-  create a intervention letter for the selected plan
-  record details of phone contact about the selected intervention
-  record details of email contact about the selected intervention
-  record additional notes about the selected intervention
-  show a help hint
-  undock the loaded list (by clicking on this icon and then clicking once anywhere in the screen)
- select a [filter](#)

- add, edit or delete a filter

Note: The **Undock Form** icon  only appears if the 'Allow form undocking' box in the [Workspace preferences](#) is checked.

Note: All the actions listed above apply to the selected patient. See [Care Plans](#) for further information about interventions and plans.

Note: If your practice is sending immunisation data to [NIR](#) you may also have a **Opt off** icon  appearing in this view. See Send immunisation updates to NIR



Filter Work Centre Care Plan Analysis

This topic describes each field within the [filter](#) window for the [Work Centre, Clinical, Care Plan Analysis](#) view. The information showing in this view will vary depending on the filter selected.

Note: Refer to [Setting up filters](#) for general information about working with filters.

Filters are user or role-specific, depending on your set up. You may only be able to view filter settings, or alter them as well, as required, depending on whether the 'Allow Edit Filters' action is granted for at least one of your [roles](#).

To open the filter window

- | Step | Action |
|------|--|
| 1 | Go to Organisation / Work Centre on the menu bar. |
| 2 | Click Care Plan Analysis under the Clinical segment in the segment list. |
| 3 | Click Edit beside the View field. The Care Plan Analysis Filter window appears. |

- View or [edit the filter](#), as appropriate. Refer to field description below for information on each setting.
- Click **Close** to close the window.

Field	Description
View Description	Name given to identify the filter. It needs to be as descriptive as possible to be easily identified from a drop-down list.
Provider	Select the appropriate radio button(s). Select: <ul style="list-style-type: none"> ■ all to display information for all patients, regardless of who their usual provider is ■ only to display information for patients with a specific usual provider. If only is selected, you will also need to further select the appropriate radio button. Select: <ul style="list-style-type: none"> ■ specify, if you want to specify provider other than yourself ■ me, if you want to only display information on patients for whom you are the usual provider
Patient group	Select the appropriate radio button. Select: <ul style="list-style-type: none"> ■ all to include all patients, regardless of which patient group they are part of, if any ■ only to only look at patients from the patient group selected from the drop-down list

Note: Patient groups are user and/or organisation specific. For more information see [Work Centre Groups](#). Additionally, preferences determine which types of groups and with which status will be available for selection from this drop-down menu. See Patient Preferences Other tab for more information.

Int. Hold	Select the appropriate radio button. Select: <ul style="list-style-type: none"> ■ All to display all interventions regardless of whether or not they are on hold ■ Only to choose the relevant option from the drop-down list (i.e. to display only interventions that are on hold, or only those that are not on hold)
------------------	---

Maximum patient list size is	Enter the maximum number of patients to be displayed in the Patients List.
-------------------------------------	--

Note: When trying to display a list of patients exceeding the number specified in this field, a prompt will come up, giving you the option to display the list anyway or not.

Patient Status is	Check the appropriate boxes. Only patients with these statuses will be considered, when selecting this filter.
On plan, not eligible	These check boxes apply to 'not eligible' patients. 'Not eligible' patients are those enrolled in the plan even though they do not meet the criteria of the care plan screening rule. Check the appropriate box(es). Check: <ul style="list-style-type: none"> ■ omit completed if you do not want to include 'not eligible' patients if all interventions in the plan are completed (or excluded or declined) ■ omit incomplete if you do not want to include 'not eligible' patients if all interventions are incomplete

Include closed plans	Check this box if you wish to include patients with a closed care plan in the In Plan block.
-----------------------------	--

Note: The In Plan block displays patients enrolled in the plan, where the plan status *is not* Excluded or Declined.

Explanations

based on most recent only	Check this box if you wish to only count the most recent outcome code when an intervention or action is found multiple times for the same patient.
Analyse	This field determines what is displayed in the Plan Interventions or Actions area. Select: <ul style="list-style-type: none"> ■ actions if you wish to display all actions as set up in the care plan template for the designated pathway ■ interventions if you wish to display only the interventions as set up in the care plan template for the designated pathway

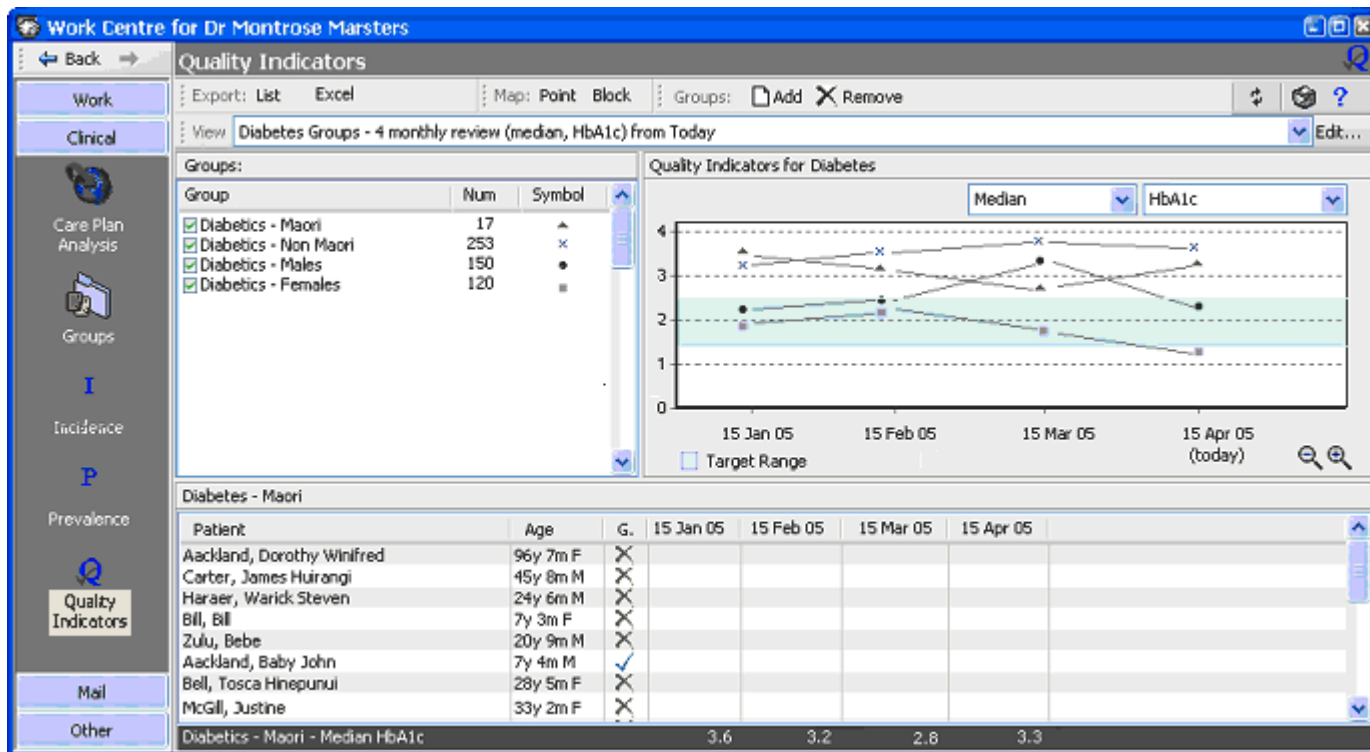


Work Centre Clinical Quality Indicators

The **Clinical Quality Indicators** view of the Work Centre displays graphical information regarding the effectiveness of clinical care over groups of patients.

Open this view by going to the Work Centre, clicking on the **Clinical** segment, then on **Quality Indicators**.

The graphical information displayed is governed entirely through filters; see [Filter quality indicators](#) for details.



Toolbar

- Export:**
- List** export the patient list in the bottom panel to a [Jaffa](#) file
 - Full** export all displayed patient lists to a [Jaffa](#) file
 - Excel** open Microsoft Excel with the graphed data copied into spreadsheet cells
- Map:**
- Point** map patient addresses as points on a map
 - Block** map patient addresses as shaded regions on a map

Note: In order for the mapping functionality to operate, at least some of the patients' addresses in the list must be Geocoded and the mapping software installed. Refer to [General Preferences Geocoding tab](#) for more information.

- Create a new static group from the patient list in the bottom panel
- Refresh the view (including recalculating the graph)
- Print the view
- Undock the view
- View Default filter Select an appropriate [filter](#)
- Edit...** [Add, alter or delete filters](#)



Filter quality indicators


The gathering and graphical display of data for the [Clinical Quality Indicators](#) view of the Work Centre are governed by filter specifications. This topic describes how to set up Quality Indicator filters to display a desired data set.

Note: Refer to [Setting up filters](#) for general information about working with filters.

Filters are user or role-specific, depending on your set up. You may be able to only view filter settings, or alter them as well, as required, depending on whether the 'Allow Edit Filters' action is granted for at least one of your [roles](#).

To open the filter window

Step Action

- 1 Go to **Organisation / Work Centre** on the menu bar.
- 2 Click **Quality Indicators** under the **Clinical** segment in the segment list.
- 3 Click  beside the **View** field. The **Quality Indicators Filters** window appears.

- 4 View or [edit the filter](#), as appropriate. Refer to field description below for information on each setting.
- 5 Click **Close** to close the window, or **Apply** to save your changes, select the current filter and close.

Field

Description

View Description

Name given to identify the filter. It needs to be as descriptive as possible to be easily identified from a drop-down list.

Type of view

Choose between:

- **Diseases** -- select one or more diseases, and graph the evolution of predefined [disease monitors](#) over time. For example, you might choose diabetes mellitus; if your system has defined haemoglobin A1c and blood sugar levels as disease monitors for diabetes, this filter will graph those two monitors over time for diabetes <patients>.
- **Patient Groups** -- use existing [patient groups](#) and select one or more monitoring measurements to graph over time. For example, if you have a

patient group called 'Obese females over 40', you could graph such measurements as BMI, average body weight, and incidence of cardiovascular disease for that group over time.

Patient Groups tab

Group Name	Provider	Symbol	Size	Col...
<input checked="" type="checkbox"/> Diabetes -- Maori	All	▲	1	Red
<input checked="" type="checkbox"/> Diabetes -- Non-Maori	All	×	1	Blue
<input checked="" type="checkbox"/> Diabetes -- Males	All	◆	1	Green
<input checked="" type="checkbox"/> Diabetes -- Females	All	■	1	Pink

Monitor	Timeliness	Calculation	Target	Low	High	Y-min	Y-max	Scale
Glucose	1Days	Median	No					
HbA1c	1Months	Median	Yes	1.5	2.5	0	5	

Initial monitor for presentation: HbA1c



Note: This tab appears only if **Type of view** is 'Patient Groups'.

Patient group to display

The population of patients to analyse will be taken from one or more patient groups that you specify here.

Note: Patient groups are user and/or organisation specific. For more information see [Work Centre Groups](#). Additionally, preferences determine which types of groups and with which status will be available for selection from this drop-down menu. See Patient Preferences Other tab for more information.


- Click  to add a patient group.

- Select the group from the list of predefined patient groups in the **Patient group** drop-down list.
- If you wish, select a provider or group of providers from the **Provider is** drop-down list. This will limit the graph to those patients whose main provider is selected here.
- Choose a symbol shape, size, and colour to represent the selected group on the graph. 'Size' refers to the thickness of the symbol's outline, in pixels.
- Click **OK** when done.
- Select a group and click  to alter its symbol, or to replace it with another patient group.
- Select a group and click  to remove it from the list.
- Place a tick next to the group name to include it in the graph.

Monitoring concepts



Specify the monitoring measurements that you wish to graph for the specified patient groups.

- Click  to add a monitor.

- **Monitor** -- the measurement to graph. This is a concept from a [termset](#). Type the first few letters in the text box, or click  to select the monitor from a [term selector](#) window.
- **Monitor type** -- the type of measurement that the monitor uses. This setting will govern the appearance of further fields below, to specify normal and abnormal results for the monitor. Choices are **Quantity**, **Quantity Range** (such as 135/70), **Date Time**, or **Boolean**.
- **Timeliness** -- how long a measurement is typically valid for monitoring the condition to be graphed; for example, 3 days or 1 month. Enter a number and then choose the unit of time from the drop-down box. Measurements that fall outside of this window will not be included in the graph.
- **Calculation** -- the type of calculation to be displayed, such as 'Average' or 'Count'. For each time interval specified in the **Display tab** (below), the system will perform this calculation on the population from the selected patient group(s).
- **Target** -- tick this box if you wish to display a shaded portion of the graph representing the maximum and minimum ideal values for the monitor.
- **Low** -- the minimum value for the target range.
- **High** -- the maximum value for the target range.
- **Y-min** -- the lower bound of the graph of monitor values.
- **Y-max** -- the upper bound of the graph of monitor values.
- **Scale** -- the number of intervals to show on the X-axis.

Note: The system will choose default values for **Y-min**, **Y-max** and **Scale** if you leave them blank.

Tip: The calculation type and the scale of the graph can be modified directly from the Clinical Quality Indicators view, without having to edit the filter.

- Select a monitor and click  to alter its properties, or to replace it with another monitor.
- Select a monitor and click  to remove it from the list.

Initial monitor for presentation

When more than one monitoring concept has been specified, choose one to present first when this filter is selected for the Clinical Quality Indicators view.

Disease tab

Note: This tab appears only if **Type of view** is 'Diseases'.

Time frame Specify the time frame that you want the filter to look at by selecting a **From** and **To** date from the calendar, if you wish to limit the data by date. If these fields are left blank, no date limitations will apply.

Confidence Check one or two boxes if you only want to view [problems](#) that have a specific confidence level, when this filter is selected. If none of the boxes are checked, the **Confidence** field of problems will be ignored.

Base On Tick the appropriate boxes to determine what the identification of problems should be based on. Options are:

Option

Found in

Cause

[Encounter properties](#), **Cause** field

Diagnosis, Adverse, Procedures, Social / Risk, Administrative

Patient's [problem](#) list (of relevant type)

Pregnancy

Patient's [problem](#) list (only for pregnant women)

Case

Case window, **Diagnosis** field

Encounters

[Contact properties](#), **Diagnosis** field

For example, if only the 'Encounters' box is checked, then only encounters coded with the problem will be taken into account. If the problem was only added to the problem list as a problem of any type, then it will be disregarded. Please note that the more boxes you tick the slower it will be to load the list when this filter is selected, especially if one of the boxes checked is 'Encounters'.

Note: The system will only look at problems linked to a term set. See [Select Disease Code](#) for more information.

Provider Search for and select a provider or a group of providers, if you only want to view patients whose usual provider is specified in this field. Options are:

- **All** for all patients regardless of provider
- **Group** for patients belonging to members of the [provider group](#) specified in the adjacent field
- **Only** for patients belonging to the single provider specified in the adjacent field
- **Me** for your patients only
- **Me and group** for patients belonging to you or to anyone in the provider group specified in the adjacent field

List diseases Select the appropriate radio button. Select:

- **All** to report on all problems
- **Top** to report on the number of most used problems specified in the adjacent field
- **Any over** to only report on problems that have been used at least the number of times specified in the adjacent field


Patient group Select the appropriate group from the drop down menu. Select:

- **All Patients** if you want to report on problems across all patients
- Any other option, if you only want to report on problems across the specified [patient group](#)

Show items

Select the appropriate radio button to specify the diseases whose monitors will be graphed. Select:

- **Concepts** and add the relevant item(s) to look at specific diseases.

Diseases are chosen from [termsets](#); click on  to bring up a [Term Selector](#) window.

- **All items** to look at all items (or, rather, all those that meet the criteria specified in **List diseases**).

Note: It is not necessary to enter such parameters as monitor type, timeliness, or target ranges, because these will already have been specified in the [disease monitor definition](#) for the disease(s) in question.

You can further specify these radio buttons, by ticking the appropriate column(s) on the appropriate line(s), if the **Concepts** radio button is selected, or by checking the appropriate boxes, if **All items** is selected.

Descendents (D): If the box is checked, or the column ticked, it will look at all descendent disease codes if the term set has a hierarchical structure.

Multiples (M): If the box is checked, or the column ticked, it will count the problem as many times as the problem is added to the patient. If unchecked, the problem will only be counted once for the same patient, even if the problem is added to the patient list or an encounter coded with it several times.

Tip: Loading the view will be considerably faster if **Descendents** are not included.

Calculation is

The type of calculation to be displayed, such as 'Average' or 'Count'. For each time interval specified in the **Display tab** (below), the system will perform this calculation on the defined disease monitors, over the population specified in the above fields.

Tip: The calculation type can be modified directly from the Clinical Quality Indicators view, without having to edit the filter.

Display tab
Time frame**Reference date is**

The starting date from which the statistical intervals to display should be calculated. Options are today, an offset from today, or an absolute date.

There are [] periods

How many intervals should be shown initially on the graph. (The user can modify the display on the fly, by zooming in or out.)

Working [] from the Reference Date

Intervals are calculated either forward or backward from the Reference Date.

In [] intervals

The spacing of the intervals, such as 1 week or 3 months. Enter a number in the number box, then choose Days, Weeks, Months or Years from the drop-down list.

Collect Data for [] periods How many intervals the system should gather data over. This does not have to be the same as the number of periods displayed (above), since the user can modify the display by zooming in or out.

Parameters

Interpolate If this box is ticked, a curved line will be fitted through the data points; otherwise a straight line will connect each adjacent pair of points. (This field is relevant only if the **Graph type** is 'Line'.)

Include target range underlay If this box is ticked, and the measurement to display has a target range defined, that range will appear shaded on the graph.

Colour Select the colour for the target range underlay.

Density Select the colour density for the target range underlay. Examples:

 25% --  50% --  75% --  100%

Interval Data Determine how to collate multiple data points for the same individual in the same interval. The system uses the 'Timeliness' specification of the measurement to determine the window of time within which to look.

- **Most recent** -- use the measurement closest to the specified time for that interval
- **Average** -- use the mean value of all measurements within the 'Timeliness' for that interval
- **All** -- use every value that falls within the 'Timeliness' for that interval as a separate data point

Graph The style of graph to display; Time Series is the only option presently implemented.

Graph type Select how to represent data points on the graph:

- **Point** -- individual dots, unconnected
- **Line** -- connected dots
- **Bar** -- vertical bars