

Instructions to identify patient insurance coverage in the Epic Electronic Health Record (EHR) systems

These instructions are created specifically to identify patients who have been prescribed a medication of interest and are covered by insurance for the Epic EHR system, and will not work for other conditions, treatments, therapeutic areas, or other EHR systems. A selection of care setting can also be made using these instructions.

Account customers have communicated a need to identify patients who have been prescribed specific medications and to evaluate their insurance coverage. EHRs have standard reporting solutions that allow for such queries to be created without the need for additional reporting solutions. An example of a reporting solution is the pursuit list, often used for population management purposes by health systems. The inclusion criteria are suggestions and may be modified by the HCP or health system.

While identifying patients on medications of interest and evaluating their insurance coverage can usually be accomplished in minimal time, Pfizer recommends that the resulting list of patients be incorporated in the organization's clinical workflow, business, and clinical practices.

The inclusion criteria are:

- Active <insert medication name> medication use
- Patient insurance coverage

See next page for step-by-step instructions for entering orders



Important Notes

- The Customers (i.e., medical group, IDN) shall be solely responsible for implementation, testing, and monitoring of the instructions to ensure proper orientation in each Customer's EHR system
- Capabilities, functionality, and setup (customization) for each individual EHR system vary. Pfizer shall not be responsible for revising the implementation instructions it provides to any Customer in the event that the Customer modifies or changes its software, or the configuration of its EHR system, after such time as the implementation instructions have been initially provided by Pfizer
- While Pfizer tests its implementation instructions on multiple EHR systems, the instructions are not guaranteed to work for all available EHR systems and Pfizer shall have no liability thereto
- While EHRs may assist providers in identifying appropriate patients for consideration of assessment and treatment, the decision and action should ultimately be decided by a provider in consultation with the patient after a review of the patient's records to determine eligibility, and Pfizer shall have no liability thereto
- The instructions have not been designed to and are not tools and/or solutions for meeting Meaningful Use, Advancing Care Information, and/or any other quality/accreditation requirement
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Step-by-Step Instructions for Entering Orders

One of Epic's reporting solutions, SlicerDicer or Reporting Workbench, may be used to identify patients who have been prescribed a specific medication and to evaluate their insurance coverage. Both are self-help reporting solutions to identify patients. Consult your organization if administrative user rights are required to access the applications.

WORKLOAD ESTIMATE

Creating a patient list requires minimal time. The estimated time may vary based on the user's experience level with running patient lists.

INSTRUCTIONS

Reporting Workbench

1. Access **Reporting Workbench** (click the **Epic logo>Reports>My Reports**).
2. Select the **Library** tab.
3. Select **Clinical** from the **1. Select Type** options.
4. Select **Find My Patients – Generic Criteria** from the **2. Select Template** options.
5. Click **Edit** under the **Select Criteria** window.
6. Click the **Criteria** tab to select the criteria.
7. Add the **Patient Base**, **Current Medications**, and **Payer** criteria to the report (if not already available).
8. Click **Change Criteria** (or **Add** and **Select a Property**). Add **Patient Base** by entering **Patient Base** in the search field (Filter Criteria). Click **Finish**.
9. Click **Change Criteria** (or **Add** and **Select a Property**). Add **Current Medications** by entering **Current Medications** in the search field (Filter Criteria). Click **Finish**.
10. Click **Change Criteria** (or **Add** and **Select a Property**). Add **Payer** by entering **Payer** in the search field (Filter Criteria). Click **Finish**.
11. Click the **Display** tab. Select any additional columns to add additional columns. To add a column, check the **Column Name** and click the right arrow.
12. Click the **General** tab. Enter a name for the report and click **Save**.
13. Click **Run** to execute the report.
14. Click the **Filter** tab to display all filters.
15. Click the **Current Medications** filter and select medication name.
16. Click the **Payer** filter and select all desired plans. Click **Apply**.
17. Click the **Location/Care Setting** filter and select the desired care setting.
18. The list will display all patients matching the criteria.

NOTE: Consider SlicerDicer as an alternative

1. Access **SlicerDicer** (click the **Epic logo>Reports>SlicerDicer**).
2. Click **New** to start a new query.
3. Click the drop-down arrow next to **All Patients** and select **My Patients** from the list.
4. Click **+ Add Criteria**. A new window will display.
5. Select the **All** tab on the bottom of the SlicerDicer window to display all filters.
6. Click the **Medications** folder.
7. Click in the **Medications** field and enter **<insert medication name>**.
8. Click **+ Add Criteria**. A new window will display.
9. Open the **Demographics** folder. Next, click the **Payer** folder.
10. Click in the **Payer** field and enter all desired plans.
11. Click **Save As** to save the query and refine the query results. The report may be exported to a Reporting Workbench report if desired for refinement.
12. In Reporting Workbench, click the **Filter** tab to display all filters.
13. Click the **Current Medications** filter and select medication name.
14. Click the **Payer** filter and select all desired plans. Click **Apply**.
15. Click the **Location/Care Setting** filter and select the desired care settings.
16. The list will display all patients matching the criteria.

This piece was developed independently by Pfizer

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