IS IT TIME TO CONSIDER THE NEXT STEP FOR YOUR PATIENTS WITH PBC?

Have you reviewed prognostic markers for your patients with PBC recently?

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Lowering certain prognostic markers has been shown to reduce risk and improve survival in patients with PBC.[1,2,,†]*

Your EHR/EMR system can be used to help you evaluate your patients with PBC.

Identify your patients with PBC (ICD-10 Code K74.3[3,‡])

■ **Pull a list report in the EHR/EMR system to help identify your patients with PBC and evaluate their response to pharmacological treatment. Criteria to review include[4,5]:**

Age	Current medications
Gender	Date of last office visit
Date of PBC diagnosis	TE/MRE

Last 3 laboratory results for the following:

- ALP[§]
- ALT[§]
- AST[§]
- GGT[§]
- Total bilirubin[§]
- Albumin[§]
- Platelet count

The Global PBC Study Group[ǁ] suggests these updated prognostic markers be considered[1,2]:

- The optimal threshold for ALP is ≤1 x ULN*
- The optimal threshold for bilirubin is ≤0.6 x ULN*
- Regular assessment of fibrosis stage[†]

ALP, alkaline phosphatase; ALT, alanine aminotransferase; AST, aspartate aminotransferase; EHR, electronic health record; EMR, electronic medical record; GGT, gamma-glutamyltranspeptidase; ICD-10, Internal Classification of Diseases, 10th Revision; MRE, magnetic resonance elastography; PBC, primary biliary cholangitis; TE, transient elastography; UDCA, ursodeoxycholic acid; ULN, upper limit of normal.

*The Global PBC Study Group conducted an analysis including UDCA-treated and untreated patients diagnosed with PBC (N=3,059) with bilirubin levels ≤1x ULN at baseline or at 1 year. The study explored optimal thresholds of bilirubin and ALP to predict liver transplantation or death. The association of ALP with survival was assessed in a subgroup of UDCA-treated patients with ALP ≤1.67 x ULN and normal bilirubin at 1 year.[1]

†Data from the Global PBC Study Group were used, and this analysis included UDCA-treated patients in whom a liver biopsy was performed at study entry in order to evaluate the utility of baseline fibrosis stage in predicting long-term outcomes in the context of biochemical risk stratification. Biopsies conducted in the 24 months prior to study entry and up to 12 months after study entry were considered baseline.[2]

‡For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

§Obtain ULN for these parameters from the laboratory in which patient had blood drawn, as guidelines-based treatment decisions are based on whether these parameters exceed a laboratory ULN.

ǁThe Global PBC Study Group is an international collaboration of 17 centers across Europe and North America that aims to identify reliable surrogate endpoints in PBC using patient data from long-term follow-up cohorts.[1,2]

Assess other factors important in overall PBC management

- Review liver-related decompensation events/hospitalization in the last year[4,5,¶]
- Review additional tests and laboratory results, including[4,5]:

TSH	Vitamins A, D, E, and K
Bone mineral densitometry	INR
Liver ultrasound	Upper endoscopy
LDL-C	CBC

- Review clinical considerations such as pruritus, fatigue, Sicca syndrome, family screening, liver-related decompensation events, comorbid autoimmune diseases, or hyperlipidemia[4,5]

Create PBC-monitoring routines using your EHR/EMR system

- Consider performing EHR/EMR pulls regularly in patients with PBC. AASLD guidelines recommend routine monitoring of liver tests every 3 to 6 months[5]

- Regularly assess patients' fibrosis stage[2,4]

- Evaluate patient records before each appointment to determine if optimal thresholds are being met

- Consider GLOBE or UK-PBC scoring systems, based on continuous laboratory variables, to assess prognosis after initiation of UDCA[4,5]

AASLD, American Association for the Study of Liver Diseases; CBC, complete blood count; EHR, electronic health record; EMR, electronic medical record; ICD-10, International Classification of Diseases, 10th Revision; INR, international normalized ratio; LDL-C, low-density lipoprotein cholesterol; TSH, thyroid stimulating hormone; UDCA, ursodeoxycholic acid.

¶May refer to liver-related ICD-10 codes, such as ascites, esophageal varices, portal hypertension, or cirrhosis.[4,5]

References: 1. Murillo Perez CF, Harms MH, Lindor KD, et al; the GLOBAL PBC Study Group. Goals of treatment for improved survival in primary biliary cholangitis: treatment target should be bilirubin within the normal range and normalization of alkaline phosphatase. *Am J Gastroenterol.* 2020;115(7):1066-1074. **2.** Murillo Perez CF, Hirschfield GM, Corpechot C, et al; the GLOBAL PBC Study Group. Fibrosis stage is an independent predictor of outcome in primary biliary cholangitis despite biochemical treatment response. *Aliment Pharmacol Ther.* 2019;50(10):1127-1136. **3.** 2022 ICD-10-CM Diagnosis Code K74.3. ICD10Data.com Website. https://www.icd10data.com/ICD10CM/Codes/K00-K95/K70-K77/K74-/K74.3. Accessed January 17, 2022. **4.** Younossi ZM, Bernstein D, Shiffman ML, et al. Diagnosis and management of primary biliary cholangitis. *Am J Gastroenterol.* 2019;114(1):48-63. **5.** Lindor KD, Bowlus CL, Boyer J, Levy C, Mayo M. Primary biliary cholangitis: 2018 practice guidance from the American Association for the Study of Liver Diseases. *Hepatology.* 2019;69(1):394-419. **6.** 2013 ICD-9-CM Diagnosis Code 571.6. ICD9Data.com Website. http://www.icd9data.com/2013/Volume1/520-579/570-579/571/571.6.htm. Accessed January 17, 2022.

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IDENTIFYING PATIENTS WITH PRIMARY BILIARY CHOLANGITIS IN YOUR EHR/EMR SYSTEM WITH ICD-10 CODE K74.3*

The next few pages provide step-by-step instructions on how to run a patient report based on condition (ICD-10 code) for common EHR/EMR systems:

Allscripts TW
(version 19.4)

Allscripts TW
Admin Automating Scheduled Query
(version 19.4)

Allscripts TW
Admin Patient List Menu
(version 19.4)

Allscripts TW
End User Patient List Query
(version 19.4)

Allscripts TW
End User Patient Lists
(version 20.1)

athenaOne
(version 22.7)

Cerner
(version 2018.08.05)

Cerner RW
Report Writers
(version 2018.08.05)

eClinicalWorks
(version 11.52.75.6)

EpicCare Ambulatory
(version May 2022)

GE Centricity
(version 9.8-12.x)

gMed-gGastro
(version v5.r1.1)

Greenway Intergy
(version 12.50.00.03)

Greenway PrimeSuite
(version 18.00.02.06)

McKesson Practice Partner
(version 11.4)

Meditech Expanse
(Service Release 13)

NextGen
(version 6.2021)

Practice Fusion
(version 3.72)

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

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Allscripts Touchworks
(version 19.4)

TouchWorks (TW) has several workflow options to create and run patient lists. This workflow is based upon the TW admin creating the Patient List and exporting that completed list to the user.

1. Under the **VTB** (**Vertical Toolbar**), click on **TW Admin**.
2. Click on the **Patient Query** menu item.
3. Select the **Manage Queries** button, located at the bottom left. (A new box will open.)
4. Create a name for the new Query in the **New Query Name** box and click on the **Green Plus** icon. (A new box will open to add logic to the new query.)
5. Select **Diagnosis** from the **Options** menu.
6. Select **ICD-10** from the **Select an Option** drop-down menu.
7. Add the ICD-10 Code **K74.3** into the search box and click on the **Search** button.
8. The **K74.3** code now appears in the **Search Results** box. Click on the right pointed arrow to move the selection **K74.3** to the **Current Selection** box.
9. Set **Diagnosis Status** to **Active**.
10. Add a date range using the drop-down to the right of the **Active** status.
11. Set the **Date Range** filter content fields as desired: Field one: choose **Desired Relationship**; Field two: select the **Desired Numerical Value**; field three: select your **Preferred Time Frame** (e.g., Field one: **In Past**. Field two: **2**. Field three: **Years**. Result: **In Past 2 Years**.).
12. Set **Include/Exclude** to **Include**. Click **OK**.
13. Click on **Save and Return** located at the bottom of the **Options** menu, under the **Query Actions** header. (You will now be returned to the query list.)
14. Locate the new query and click the **Run Query** icon.
    NOTE: Depending on the amount of data returned, this could take some time to complete.
15. **Query Started Successfully** pop-up box will appear. Click **OK**.

16. Query results will be displayed in the **Query History and Results** panel to the right.
17. Once the query has completed, click on the **Magnifying Glass** icon located just to the left of the query **Started On** date in the **Query History and Results** panel. (This will open the **Query Result View** window.)
18. In the drop-down box **Profile**, select the desired profile
    NOTE: If you have not yet created a profile, follow the steps in the box below. (The profile determines the fields that will be displayed in your report.)
19. Click on the **Start Patient List Export** icon located to the left of the **Add Profile** icon.
20. Click on the **Refresh** icon until the **Card File** icon appears by your query.
21. Click on the **Card File** icon.
22. Report is now available in the **Exported Data** window
23. Click on the **Select /Unselect All** icon in the upper right-hand corner to select all columns to be included in the report.
    NOTE: A max of 10 columns can be selected for the PDF option.
24. Report can now be exported to either **Excel** or **PDF** format by clicking on one of the corresponding icons, located in the upper right-hand corner.
25. Once the export option is selected, the **View and Track Your Download** window will be displayed.
26. From **View and Track Your Downloads** click on the **Save** button to save the report to the PC's default download folder, or click on the **Black Drop-Down Arrow** and select **Save As** to choose a preferred save location.

NOTE: If you do not already have a profile created, you will need to complete the following steps:
1. From the **Query Result** view, click on the green circle with the white plus sign icon to create a profile and select all the fields that apply. The available **Profile** items include:
   First Name, **Last Name**, **Date of Birth**, **Zip Code**, **State**, **Gender**, **Address 1**, **Address 2**, **City**, **MRN**, **Home Phone**, **PCP Patient Header**, **Preferred Communication**
2. Type in a profile name.
3. Click **Apply**. This profile will then appear on your drop-down list in the **Export Profile** field.

Allscripts Customer Service
800-877-5678

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

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TW has several workflow options to create and run patient lists. This workflow is based upon the TW admin creating an automated patient list query which the end users can access within TW.

1. **Automating the Query (Must have TW Admin privileges):**
   a. From TW Admin menu, click on the **Patient Query**.
   b. Click on the **Manage Queries** button, located at the bottom left. The **Launcher** window opens.
   c. Locate desired query (reference Tip Sheet when creating a PBC Patient List for Report Writers TW)
   d. Click on the **Calendar** icon (**Schedule Query Run**) by the desired query. The **Patient Query Schedule – Patient Query Scheduler** window will open.

   NOTE: To see **Calendar** name, **Schedule query run** and then hover your mouse over the **calendar** icon.

   e. In the **Time & Duration** box, set the **Start Time** and **Start Date**.
   f. Select **End Date?** if desired.
   g. In the **Recurrence Pattern** panel, select recurrence, (i.e., **Once**, **Daily**, **Weekly**, **Monthly** and the corresponding schedule for that recurrence), (e.g., for monthly, select the **First Monday of Every Month**).
   h. Click the **Add Schedule** button.
   i. Click **Close Window**.
   j. Click the **Return to EHR** button located in upper right-hand corner. This takes you to the **Patient Query** main page.

2. **Create an Action Set (Must have TW Admin privileges):**

   NOTE: This is how TW sends the automated query from the admin area to the location where end users can access the query.

   a. In the **Patient Query** area, locate and select the automated query from above.
   b. Click the **New** button. It will take you to the **Add/Edit Action Set** tab.
   c. In the **Action Set Property** tab, you can add a description of the report in the **Patient Action Description** text box, (e.g., PBC patient list monthly report).
   d. Under the **Action Set Properties** tab, check the **Replace Existing** box.
   e. Click **Save**.

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*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK PBC™

TW has several workflow options to create and run patient lists. This workflow provides step-by-step instructions for the TW admin to add a Patient List menu to the HTB and to assign users so they can easily access automated Patient List queries from their TW workplace.

NOTE: Proceed with **extreme** caution while working in the TW "Admin" section as clicking on or inadvertently removing/changing a setting can make TW inaccessible to **all** users.

1. **Identifying the correct toolbar to add the Patient List menu**
   When adding a new menu item to the HTB, it will be necessary to identify the name of the tool bar you will be modifying. Since these names can be nondescriptive and unique to each organization, following the steps below will help you locate the correct toolbar in the TW Admin section.
   a. Open a patient chart and select the workplace that displays the HTB where you wish to add the **Patient List** menu.
      NOTE: Once you have the appropriate workplace in context, take a screen shot of the HTB and workplace for later reference.
   b. The HTB name should be similar to the workplace name (e.g., Workplace name = Provider and HTB name = ProvChartHTB).
   c. In the above example, you would locate and select the ProvChartHTB in the **Admin>Menu** area and make sure the HTB menu items match your screenshot of the provider workplace HTB menu.
   d. Once you have identified the correct HTB menu, you can now add the new **Patient List** menu item.

2. **Adding the Patient List menu item to the TW HTB**
   a. From the vertical toolbar (VTB), click on the **VTB** drop down-menu and select the **Admin** item.
   b. Select the **Menus** item from the **Admin** menu list.
   c. In the **Product**: field drop-down menu, select **TouchWorksEHR**.
   d. In the **Type**: field drop-down menu, select **HTB**.
   e. In the upper right-hand corner, click on the **Search** button. A list of all HTBs will be displayed.
   f. Locate the desired HTB name within the returned list (i.e., ProvChartHTB).
   g. In the **ID** name field, click on the hyperlink of the named tool bar where you wish to add the **Patient List** menu. **Menu Items** are then displayed.
   h. In the **Menu Items** section, under the column **caption**, ensure that the display matches the list of HTB menu items from your screenshot in 1a.
   i. Click on the **Menu Items** tab at the top. Determine where you want the new menu to display on the HTB.

   j. Click on the **Insert** button to add the **Patient List** menu.
      NOTE: the **Patient List** menu will be placed directly above the **Insert** button you selected.
   k. Once you click **Insert**, a text field will appear. Click on the **Ellipsis** (**…**) in the square button beside this text field. The **Select Document** window opens.
   l. In the **Caption** field, type the name of the menu item (e.g., **Patient List**) into the **Caption** field and click **Search**.
   m. In the **ID** column, click on the hyperlink **Patient List**. This will insert the **Patient List** link into the desired workplace on the HTB.
   n. Click on **Save** located in the upper right-hand corner.
   o. Validate your work by returning to the desired workplace and ensure that the **Patient List** menu item now displays on the desired HTB.

3. **Assigning a Patient List to a TW user**
   a. Select **Patient List Admin** from the VTB.
   b. Select the **Manage Lists** tab from the HTB.
   c. Click on the **All** button. The **Users** search window will open.
   d. Type the first and last name of the user in the **Search For**: field using the following format: Smith,A.
   e. Click on the **Magnifying Glass** icon to the right of the search box.
   f. Double click on the user's name in the **Users Search** box.
   g. Click on the green **Go** icon to the right of the **Available Lists**: search box to display a list of available patient lists.
      NOTE: If you know the exact name of the **Patient List** you are searching for, you can enter that name in the **Available Lists**: search field and click on the green **Go** icon to return just that specific list.
   h. Highlight the desired **Patient List** name in the **Available Lists** box and click on **Add To My Lists** located in the lower right hand corner.
   i. The **Patient List** menu item will now be available in the user's **Patient List** drop-down menu.

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RETHINK **PBC**™

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

1. Open your TW workplace.

2. Click on the **Patient List** menu on the horizontal tool bar (HTB). The **Patient List** window will be displayed.

> **NOTE**: If you do not find the **Patient List** menu item on your HTB, you will need to request that your TW admin add that for you.

3. Click on the **List**: drop-down menu to view available patient lists.

4. Select the desired list. A list of patients that meet the report criteria will be displayed.

5. Double click on any patient in the list to go to their chart.

6. From this view you can **Print** list or **Export** list or access the **Patient Chart** from the buttons at the bottom. You can also **Remove** patients from the list or **Assign tasks** related to a patient using the buttons at the bottom of the screen.

> **NOTE**: There are two filter options available in the **Patient List** user area.
> **Date** filter: In the event that the **Patient List** currently in context has multiple report dates, the user can use this filter to search for patients within a specific date range. The filter options include **Start** and **End** date range filters.
> **Patient** filter: This filter provides the user the ability to search for a specific patient. You can search by either **Name** or **MRN** from the drop down menu.

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*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

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7

TW has several workflow options to create and run patient lists. This workflow provides step-by-step instructions for the end user to add the **Patient Lists (Pt Lists)** menu item to their Action Bar. It also provides instructions for the TW Admin to assign a specific patient list to a user. This will allow the end user to easily access automated patient list queries.

Instructions for the end user to configure the Pt List menu item to appear in the Action Bar.

TW now provides end users the ability to show or hide some menu items, including **Pt Lists**.

1. From the Action Bar, select **Site Map**.

2. Select the **TW** tab.

3. Click on the **three dots** icon to the right of **Pt Lists** in the **MAIN** submenu.

4. Select **Show in Menu**.

   NOTE: Proceed with **extreme** caution while working in the TW Administration section as clicking on or inadvertently removing/changing a setting can make TouchWorks inaccessible to **all** users.

Instructions for the TW Admin to assign a patient list to a TouchWorks user.

Only the TW Admin has the ability to add or remove a user's access to specific patient lists.

1. Navigate to the **Site Map**.

2. Select the **TW** tab.

3. In the **Utilities** submenu, select **Pt Lists – Manage**.

4. In the **For:** dropdown box, select the desired user.

   NOTE: If the user does not appear in the **For:** dropdown box, click the blue **ALL** button to search for the desired user. The **Users** window will display. Type the last name (or last name, first name) of the user in the **Search for User...** box. Then click the **Search** button. Select the desired user. Then click the green **OK** button in the lower right.

5. In the **Available Lists** box, type the full name or partial name of the **Pt List** you want or leave the field blank. The results box will display those lists that begin with the characters you entered.

   NOTE: If are not certain of the name or the spelling of the **Pt List** you want, type a **%** and then a partial name. The search will then return all lists that contain the characters you entered.

6. Click the **Go** button.

7. Select the desired **Pt List** from the results box.

8. Click the **Add To My Lists** button. The **Pt List** menu item will now be available in the **List** dropdown in the user's **Pt Lists** workspace.

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800-877-5678

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

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1. From **athenaOne**, click **Reports** in the purple menu bar. Select **Report Builder**.

   NOTE: If Report Builder is not visible, contact your administrator for the appropriate user permissions.

2. Select Report Type: **Clinicals-Encounters**. Select **Next** (at the bottom of the page).

3. Select the following **Display Columns**:
   - **Clinical Encounter Date**
   - **Diagnosis Code with Description**
   - **Patient ID**
   - **Patient Name**

   Use the arrows or double click to move the selected parameters from the left pane to the right pane. Use the magnifying glass to find additional parameters, if needed. Additional display columns can be chosen, if desired.

4. Click **Next**.

5. Select the following **Filters**:
   - **ICD-10 Encounter Diagnosis Code**
   - **Clinical Encounter Date**

   Use the arrows or double click to move the selected parameters from the left pane to the right pane. Use the magnifying glass to find additional parameters, if needed.

6. In the **Filter Criteria**, select either a **Fixed Date Range** or a **Relative Date Range**. Under **Diagnosis Code**, type: ICD-10 code K743 (no period).

7. You can now **Preview** the report or select **Run Report**. Select desired **Output Method**. Click **OK**.

8. Select **Save Report**. Enter an appropriate name for your report. Select **Clinicals** to file the report. You can then find this report in your **Report Library** under your **Clinicals** tab.

Athena Customer Support
800-981-5084

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK PBC™

Cerner

(version 2018.08.05)

Generating a report through **Discern Reporting Portal**

1. Click the **Menu** dropdown on your PowerChart/SurgiNet/FirstNet toolbar to open the **Discern Reporting Portal**.

   NOTE: If you work from the **AppBar**, go to **First-time Setup: Adding Icon to Your AppBar**. The icon is also available on the **Cerner Launch** page.

2. Search for the report in **Discern Reporting Portal** by **Name** or by **Category**.

   NOTE: A list of reports will display. Reports can be selected by the source and/or categories. The categories will help assist you with narrowing down your report by selecting the appropriate folders. Scroll to see the different reports available using the numbers and/or arrows to change the page.

3. Click the name of your desired report (e.g., **Primary Biliary Cholangitis Report/ ICD-10 Code K74.3**), to see additional information.

4. Click **Run**.

   NOTE: For all reports, follow the prompts and fill in the appropriate **Date/Date Ranges** in the **Report Fields**.

5. Add the **Location** at the prompt and click **Execute**.

6. After the data is displayed on the screen, you save the output by clicking on the **Save** icon (floppy disc).

7. Name the file and select the location in your files where you would like to save it and click **Save**.

Generating a report through **BI Launch Pad**

1. Open **BI Launch Pad** application from the **AppBar**.

2. Click on **Documents**, then **Folders**.

3. Click on the **+** (sign) to expand **Public Folders**.

4. Select the folder where the report is saved.

5. Locate the desired report (e.g., **Primary Biliary Cholangitis Report/ICD-10 Code K74.3**), and double click on it.

6. Choose the **Scheduling Location** (department) and click **OK** for the report to run.

7. To export the report to PDF or Excel, click on the **Export** icon, choose the **File Type**, and click **OK**.

8. To save a copy, click **Save As**, give the file a name, and select the location where you would like to store the file.

9. Click **Save**.

Cerner Customer Support
800-277-7330

RETHINK PBC™

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

1. Log into the **BI Launch Pad**.

2. Under **My Applications**, click on the **Web Intelligence** icon.

3. Click on the **New** icon, select **Universe**, and click **OK**.

4. Select **Ad Hoc Reporting** and click **OK**.

5. Drag and drop the following fields from the **Ad Hoc Reporting** folders into the **Results Objects** box:
   a. **Diagnosis Code**
   b. **Physician-Attending**
   c. **Diagnosis Description**
   d. **Appointment Status-Short**
   e. **Birth Date**
   f. **Encounter Identifier**
   g. **MRN-Organization**
   h. **Financial Number**
   i. **Person Name-Full**

6. Drag and drop the following fields from the **Ad Hoc Reporting** folders into the **Query Filters** box:
   a. **Scheduling Location**
   b. **Appointment Status-Short**
   c. **Person Name-Last** (if you want to exclude test patients)
   d. **Diagnosis Code**
   e. **Diagnosis Type**

7. Set the **Scheduling Location** to **In List** with a **Prompt**.

8. Set the **Appointment Status-Short** to **In List** with **Values From List** set to **Checked Out**; **Checked In**.

9. Set **Person Name-Last** to **Different from Pattern** with **Constant** set to your test patient last names (e.g., TEST, ZZTEST, etc.).

10. Set **Diagnosis Code** to **In List** with **Values From List** set to **K74.3**.

11. Set **Diagnosis Type** to **In List** with **Values from List** set to **FINAL**; **DISCHARGE**.

12. Assign **Security** to the appropriate PowerChart positions.

13. Save the report as **Primary Biliary Cholangitis Report/ICD-10 Code K74.3** or other descriptive name.

14. Publish the report to the **Reporting Portal**.

Cerner Customer Support
800-277-7330

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK PBC™

eClinicalWorks
(version 11.52.75.6)

1. Select **Registry** from the upper-left navigation menu.
   NOTE: The **Reports**>**Report Console** will also get you there.

2. Select the **Large R** for Registry.

3. Click on the **Demographics** tab.

4. Select the parameters you want to include in your report.
   NOTE: You can select multiple **Primary Care Providers** or multiple **Ren Providers**; you can select only one **facility** for each report. Your report will run faster the more you narrow your parameters.
   NOTE: Once your patient population is identified as registry enabled in their demographics, you can select **Registry Enabled** to quickly select your patient population.

5. Click the **Run New** button. Then click the **OK** button.

6. Click the **ICD** tab.

7. In the box labeled **ICD Codes**, type the ICD-10 code K74.3 for Primary Biliary Cholangitis (PBC), then select all diagnoses that you want to include.

8. Select the radio button for **Search in Assessments**.
   NOTE: This will broaden your search to ensure all qualified patients are identified.

9. Select a date range.

10. Click the **Run Subset** button. Results will display. From this page you can select actions you wish to take on this report.
    NOTE: Complete the following additional steps if you wish to save your report to Excel. Select **Analyze Data**; click **Copy** to save into Excel; and, from the top menu, click **File**>**Save** to save to desired location.

11. Click **Save Query**.

12. In the popup window, **Save Registry Query Report**, and type in the name for your report.

13. Select **Prompt for Date Range**.
    NOTE: If you want eligible patients to have an alert on their records to remind the provider, select the **CDSS Enabled** box.

14. Click **OK**. You can find your saved query under the tab **Saved Reports**.

eClinicalWorks Customer Support
508-475-0450

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK PBC™

1. Click the **Reporting Workbench Favorites** hyperlink at the top of your **Reporting Homepage** (or via **My Reports** on the main toolbar). Reporting Workbench opens to **My Reports** tab.

2. Select the **Library** tab. Be sure that **Reports I Own**, **Reports I Ran Recently**, and **Reports I Am Subscribed To** are shown.

3. If no reports are seen, go to the **Library** and search **Find Patients – Generic Criteria**.

4. Select **+ New Report**.

5. Give the report a name (e.g., "Practice Name Patients with PBC Diagnosis ***").

6. In the **Patient Base** field enter: **My Patients**

   NOTE: Multiple options are available to define the patient population for your report. Depending upon your system setup, you may choose a different option to best define your patient population. If none of the available options capture your desired patient population, your system administrator can create a patient base filter specific to your practice.

7. In the **Find Criteria** field, search for **Diagnosis**.

8. In the **Diagnosis field**, add the appropriate diagnosis code(s).

9. Make sure your Report Logic is **AND**.

10. Select the **Display** tab.

    NOTE: All the columns available for the report appear in the **Available Columns** list; columns that currently appear in the report are in the **Selected Columns** list.

11. Select the following columns from the **Available Columns** list and click the right arrow to move them to the **Selected Columns** list.
    a. **Patient Name**
    b. **Patient MRN**
    c. **Patient Age**
    d. **Patient Sex**

12. Click **Save**.

13. Click **Run**. Your report results will appear on the **Detail List**.

    NOTE: From the **Explore** tab you can filter, slice, measure, and visualize your report results.

Epic Customer Support
608-271-9000

RETHINK **PBC**™

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

1. Click on **Chart Reports** on the **left navigation panel**.

2. Select **Inquiries**.

3. In the **Find** dropdown, select **Patients**.

4. In the **Where** dropdown, select **Problem Code ICD-10**, **Any**. After selecting this, click the next dropdown and select **Contains**.

5. Type in **K74.3*** (ICD-10 Code for **Primary Biliary Cholangitis**).

6. Click **Add**.

7. Click **Count** (this will show the number of patients).

8. Click **Search** (this will allow you to see who the patients are). After clicking **Search**, the report will automatically load.

GE Centricity Customer Support
866-281-7545

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK PBC™

1. From the home screen, go to **Medical Charts**.

2. Click the **Right Arrow** (**>**) to expand the tab.

3. Select **Advanced Search**.

4. Choose your desired filters, such as **Date Range** and **Problem Diagnosis**.

5. Go to the **Problems** tab to the right and select the **Plus Sign** (**+**).

6. Select **PBC** (**Primary Biliary Cholangitis**) from the list or search for **PBC** in the search window.

7. Click **Search**. **The System Will Generate a List of Patients that Meet Your Selected Criteria**.

8. To access the patient's chart, right click on the patient's name and select **View Chart**. This will take you directly to the patient's chart.

gMed-gGastro Customer Support
866-459-4227 Option 2
(selecting option 2 will take you directly to Customer Support)

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK **PBC**™

1. Select **Intergy EHR** from the upper toolbar.

2. Navigate to **Reports**.

3. Click on **Select**.

4. Click on **Clinical** in the left menu.

5. In the **Name contains** text box, type in **Clinical Analysis**.

6. Under **Report Name**, select **Clinical Analysis Report**.

7. Click **Run**.

8. Under **Sort by**, select the radio button for **Patient** or **Provider**.

9. Under **Service Dates**, in the **Range** drop-down box:
   a. Select **Custom Date**.
   b. In the text fields **From** and **To**, type desire date range (e.g., **09/05/2018** and **09/05/2022**).

10. Under **Diagnosis**,
    a. Click on radio button for **Select**.
    b. Click on **Diagnoses** button.
    c. Under **Diagnosis Type**, check **ICD-9** or **ICD-10**.
    d. In text field **Search description, code or class**, type **571.6** (ICD-9) or **K74.3** (ICD-10).
    e. Under **All Diagnosis Codes**, select the diagnosis listed and click on **Select**.
    f. Click on **OK**.

11. Under **Patients**, please mark the following:
    a. **Patients** is automatically set to **All Patients**.
    b. **Providers** is automatically set to **All Providers**. You can filter further to specific providers if desired by clicking the **Providers** button and selecting the desired providers.
    c. Under **Zip Codes**, select the radio button **All** or **Range**; choose the specific filters as needed.
    d. Under **DOB**, select the radio button **All**, **Date**, or **Age**; choose the specific filters as needed.
    e. Under **Sex**, select the radio button **All**, **Male** or **Female**.
    f. Please check the following desired filters if needed:
       • **Include Deactivated Patients**
       • **Include Deceased Patients**
       • **Page break by Provider**

12. Click **Run**.

13. In the pop-up box, select **View**, **Print**, or **Send to File**.

14. Click **Run** to display the report results.

RETHINK PBC™

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

1. Select **Reporting** from the upper toolbar.

2. Click on **Report Selection**.

3. Click on **Custom Reports** in the left menu.

4. Under **Chart**, select **Clinical-Patient Listing**.

5. Under **Reports**, select **Patient with Diagnosis X and Last Visit Date is Between X and X**.

6. Click **Current Report Filters**.

7. Under **Field Name**, in the drop-down boxes:
   a. In row one, select **Diagnosis**: **Document Diagnosis**.
   b. In row two, select **Date**: **Last Visit Date**.

8. Under **Operators**, in the drop-down boxes:
   a. In row one, select **Match any Value in List**.
   b. In row two, select **Is Between**.

9. Under **Match Value**:
   a. In row one, click **Edit Match List** hyperlink.
   b. In the text field, type **571.6** (ICD-9) or **K74.3** (ICD-10)
   c. Click **Add**.
   d. Click **OK**.
   e. In row two, type desire date range (e.g., **[09/05/2018]** and **[09/05/2022]**).

10. Click **OK**.

11. In the left menu list under **Actions**, click **Immediate** to display the report results or click **Background** to have report sent via email.

Greenway Customer Service
877-932-6301, Option 2
(selecting Option 2 will take you directly to Customer Support)

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK **PBC**™

McKesson Practice Partner
(version 11.4)

1. Click on the **Reports** tab of your **Menu Bar**.

2. From the patient's chart, go to **Reports** on the **Menu Bar**.

3. Select problem item from the **Problems List** in the **Selection Criteria** dropdown.

4. Type in **Primary Biliary Cholangitis** OR the ICD-10 code **K74.3**.* The **Operator Window** appears. Select **Equals** and click **OK**.

5. Enter **Provider ID** and click **OK**.

6. Select the report and click **Run**.
   NOTE: Complete extra step below if desired.

7. Select a destination folder to save the report.

McKesson Customer Support
855-625-6285

RETHINK PBC™

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

1. On the **Main Menu**, locate the **Menu Icon** in the upper left-hand corner.

2. Select **External Links**.

3. Click **Portal Reports**.

4. Browse **Other Reports** and Create a **New Report**.

5. Find **Search Criteria** and select conditional arguments (such as **contains** or **equals**).

6. Input **Primary Biliary Cholangitis** (ICD-10 Code **K74.3***) in filter.

7. Click **Run Report**.

Meditech Customer Support
781-821-3000

*For patients in your practice diagnosed with PBC prior to September 2015, you may need
to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK **PBC**™

1. From the NextGen top toolbar, click on **File** and then **Select Reports**>**Generate Report**>**by Enterprise**. The report filter window will launch. The **Columns** option is defaulted and displayed on the upper-left corner.

2. From this window, you can filter your report using the following criteria:
   a. Highlight and click on the **Provider** option from the **Settings List** panel. You can include multiple providers or a single provider. Highlight the provider(s) name(s) and use the arrow to move the provider(s) to the right panel to include them in the report.
   b. Click on the box with the ellipsis (3 dots) next to the **Location** field. Type the site location and select **Search**. The locations will appear. Move the location(s) you want from the left panel to the right panel to include them in your report.
   c. Click **OK**.
   d. Click on **Between** and then select beginning and end dates for **Enc Date Range**. Click **OK**.

3. Highlight and click on the **Diagnosis** options from the **Settings List** panel.
   a. Click on the box with the ellipsis. Type K74.3 and select **Search**. The list of diagnoses appears. Move the diagnoses of choice from the left panel to the right. Click **OK**.

4. Highlight and click on the **Columns** option from the **Settings List** panel. Some fields are auto selected. Deselect all fields by right clicking in the window. Choose **Deselect All**. Choose the fields you desire for your report (e.g., last name, first name, ICD-10 code, provider, location, etc.).

5. To rename the column, select the column you would like to rename by right clicking in the window. Choose **Rename Column**; a curser will appear next to the column name. You can then rename it.

6. Highlight and click the **Totals** option from the **Settings List** panel. Check **Count Records**. This will tell you the number of records you will be pulling for your report. You may need to refine your report based on the count displayed.

7. Click **OK** within the **Report Filter** window. The report will generate.

8. Click on the floppy disk icon on the top tool bar to save and name the report. If you want to run this report in the future, go to **File**>**Select Report**>**Reports List** to retrieve your saved reports.
   NOTE: from the top toolbar the user can also filter, modify, print, and export reports.

NextGen Customer Support
877-523-2120

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

RETHINK **PBC**™

Practice Fusion
(version 3.72)

1. Navigate to **Reports** from the **Clinical Reporting** options. Select **Patient Lists Report New**.

2. From the **All Patients** dropdown, select **Active Patients Only**.

3. From the **Add Criteria** dropdown, select **Diagnoses**.

4. Enter **Primary Biliary Cholangitis** (**PBC**) OR **ICD-10 code K74.3*** and **Date Range**.
   NOTE: Leaving the date blank shows an all-time patient list for the diagnosis, but may take additional time to generate.

5. After selecting all desired criteria, select **Run Report**.
   NOTE: Complete extra step below if desired.

6. User has the ability to print or export the report to a **.csv file** and save it on a disc.

Practice Fusion Customer Support
415-346-7700

*For patients in your practice diagnosed with PBC prior to September 2015, you may need to search using the ICD-9 code of 571.6 (primary biliary cirrhosis).[6]

Intercept

RETHINK **PBC**™

Learn more at rethinkPBC.com