

Primary Sense WALKTHROUGH

Identifying patients eligible for a Health Assessment using Primary Sense

Instructions with Screenshots

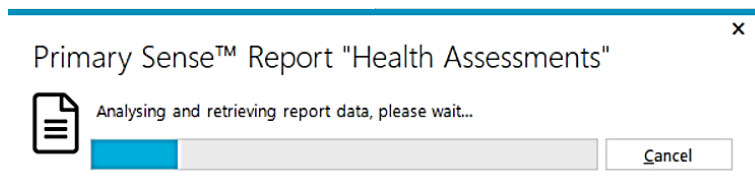
Click on the Primary Sense™ icon on the bottom toolbar to view the Primary Sense™ sidebar.



Once open, click on the Primary Sense icon that appears and select the 'Reports' button from the drop-down menu (shown to the left). This will open the 'Reports' window shown below. Double click on the Health Assessments report to open it.

A screenshot of the Primary Sense™ Reports interface. On the left side, there is a vertical sidebar with several icons: a red 'DEMO' label, a document icon labeled 'Reports' (highlighted with a red box), a plus sign labeled 'Prompts', a pill icon labeled 'Alerts', a checkmark labeled 'Patients', a pencil icon labeled 'CQI', and a gear icon labeled 'Settings'. The main area of the interface is titled 'Primary Sense™ Reports' and contains a list of reports. The 'Health Assessments' report, which is 'Eligible or due', is highlighted with a red box. Other reports include 'Benzodiazepine in substance misuse', 'Winter Wellness', 'Pregnant and Vaccinations', 'Haemochromatosis', 'Diabetes Mellitus', 'Patients with High Complexity (5 and 4)', 'Bowel and Breast Cancer Screening', 'Chronic Lung Disease and Asthma', 'Cardiovascular Disease Risk Factors', 'Frailty Care Management', 'Patients with Moderate Complexity (band 3)', 'Characteristics of the Practice Patient Population', 'Accreditation', 'PIP QI report - 10 measures', 'Patients missing PIP QI or accreditation Measures', 'Summary Report of Practice Improvements', 'Your Practice Data Quality', and 'Patients booked in with missing PIP QI measures'.

A message appears showing progress of download as below: Report automatically opens to full screen view.



The Health Assessments report will open (screenshot below). This report shows:

- patients who are eligible for a health assessment (40 - 49-year-old patients; Aboriginal and Torres Strait Islander patients; or patients ≥ 75 years); and
- Who have at least one recorded consultation or have been prescribed medication within 12 months of the date of this report. ** If you require more information, click on the 'Information about this table' button (highlighted below)

Health Assessments

DEMO

30 January 2023 14:42

Which patients are included in this report?

What data is in this report?

How do we use this report?

What are ACG patient complexity levels?

Health Assessments of patients aged 40-49 years (includes 45-49 years)

Information about this table

Show patients per page

Search:

Remove	ACG Score	Patient Name	Patient Phone	Last Visit	Existing Appt	GP Name	Age	Chronic Disease Risk Score	Diabetes Risk Score
Remove	4	White, W	0401 234 567	2021-09-30	Nil	Dr L Brown	49	0	8
Remove	3	Walker, T	0401 234 567	2021-10-01	Nil	Dr I Campbell	40	0	8
Remove	3	Thompson, W	0401 234 567	2021-09-22	Nil	Dr I Campbell	46	0	10
Remove	3	Walker, X	0401 234 567	2021-05-17	Nil	Dr I Campbell	46	0	8
Remove	2	Campbell, P	0401 234 567	2019-06-17	Nil	Dr I Campbell	45	2	4

** Please note, demo data only shown in all screenshots no real patient data shown

Sorting and Filtering within Primary Sense application

Choose which table within the report you would like to filter further information for

- Table 1: Health Assessments of patients aged 40-49 years (includes 45-49 years)
- Table 2: Health Assessments of Aboriginal and Torres Strait Islander patients
- Table 3: Health Assessments of patients $\Rightarrow 75$ years

To sort on any column, click on the small arrows next to each column heading (highlighted below)

Remove	ACG Score	Patient Name	Patient Phone
Remove	4	White, W	0401 234 567
Remove	3	Walker, T	0401 234 567
Remove	3	Thompson, W	0401 234 567

To filter the report to only include a specific Doctor, simply type the Doctor's name in parentheses in the 'Search' box above your chosen table (highlighted below in yellow).

In the example below,, Table 2: Health Assessments of Aboriginal and Torres Strait Islander patients has been chosen and "Dr L Brown" has been chosen

Health Assessments of Aboriginal and Torres Strait Islander patients

Information about this table

- This Table lists patients who are recorded as Aboriginal and Torres Strait Islanders; and
- Who have not had a health assessment in the previous 9 months (as indicated by the presence of MIS Item 715 or 228). Includes new COVID-19 telehealth Item numbers. Details here

Show 25 patients per page

Export To Excel Export To CSV

Search: "Dr L Brown"

Remove	ACG Score	Patient Name	Patient Phone	Last Visit	Existing Appt	GP Name	Age
Remove	5	Anderson, C	0401 234 567	2022-07-24	Nil	Dr L Brown	51
Remove	3	Lee, E	0401 234 567	2021-10-01	Nil	Dr L Brown	52
Remove	3	Thompson, S	0401 234 567	2021-10-01	Nil	Dr L Brown	58

Next, click on the Export to Excel button / or alternatively the Export to CSV button if you would like to use a different program.

Information about this table

Show 25 patients per page

Export To Excel Export To CSV

Remove	ACG Score	Patient Name	Patient Phone	Last
Remove	5	Anderson, C	0401 234 567	2022-07-24
Remove	3	Lee, E	0401 234 567	2021-10-01
Remove	3	Thompson, S	0401 234 567	2021-10-01

When you click Export to Excel, the option box below will appear. The “intention” marked will be recorded against the individual patient list report onto the “Summary Report of Practice Improvements”. Once chosen, click ‘Send Response’.

Please indicate your intention as this can be provided back in the Summary Care Report to help you keep track of your QI activities

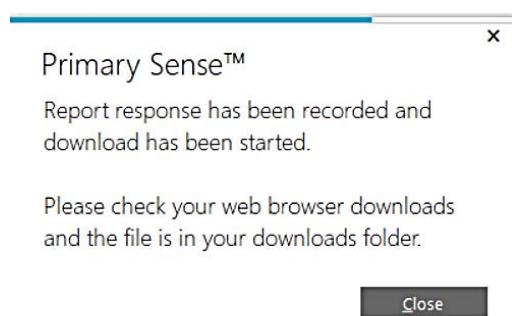
for quality improvement I am showing someone for a practice meeting

Your feedback

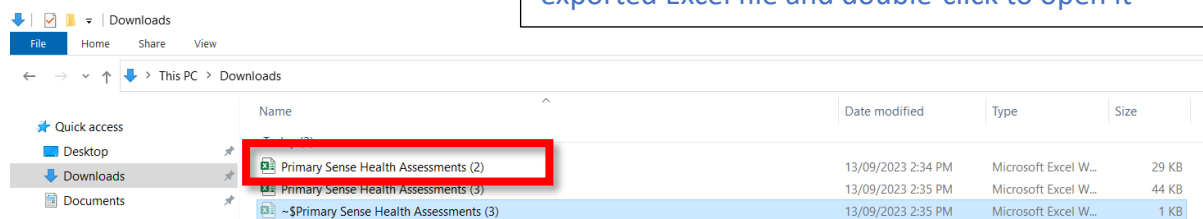
Send Response

Cancel

You will then receive the message below.



**** Please check your Downloads folder for the exported Excel file and double-click to open it**



Once in Excel you can choose ‘File’ -> ‘Print’ or select ‘Ctrl + P’ to give the report to the specific Doctor for follow up.

Alternative filtering options

If you would like to filter on a number of different options, make sure the ‘Search’ box above your chosen table is blank, click on ‘Export to Excel/ Export to CSV’.

Information about this table

Show patients per page

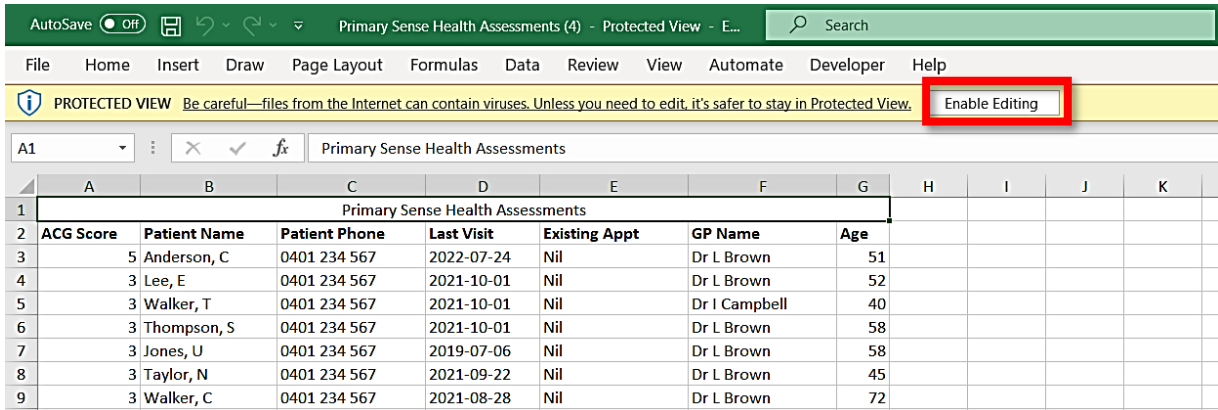
[Export To Excel](#) [Export To CSV](#)

Remove	ACG Score	Patient Name	Patient Phone	Last
Remove	5	Anderson, C	0401 234 567	2022-07-24
Remove	3	Lee, E	0401 234 567	2021-10-01
Remove	3	Thompson, S	0401 234 567	2021-10-01

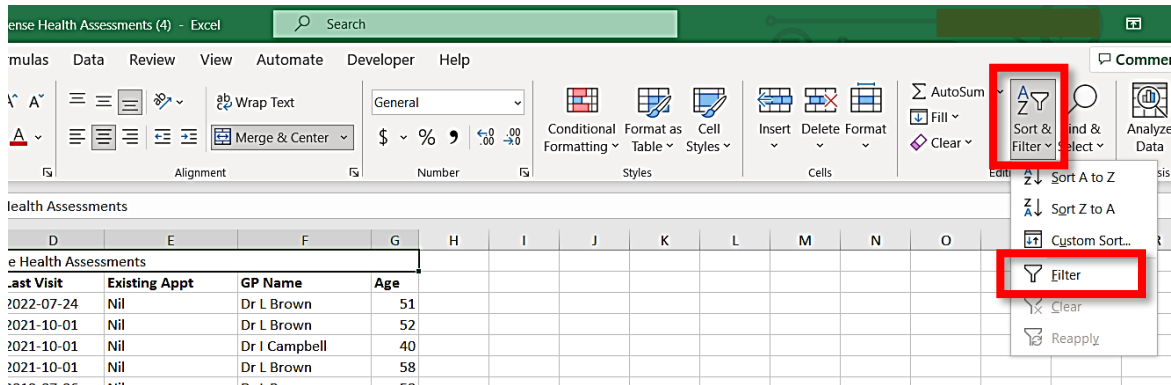
The message mentioned above for ‘intention’ will appear and file location is ‘Downloads’

**** For the purpose of these instructions, an Excel file will be used to demonstrate filtering options. Similar filtering options will be available in your chosen spreadsheet program.**

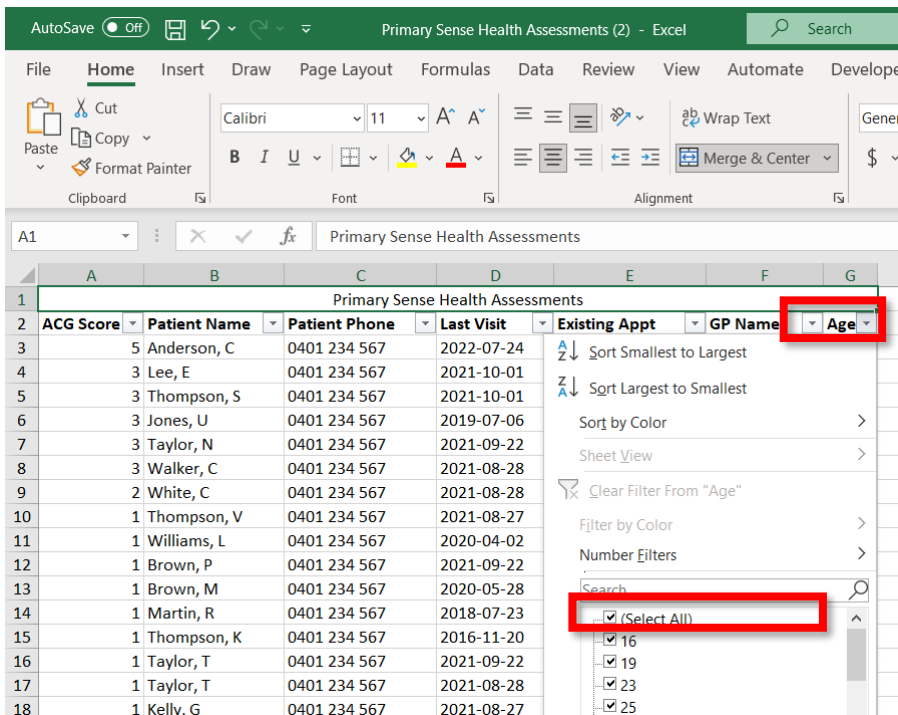
Once Excel file is opened, click on 'Enable Editing' at the top.



Next click on 'Sort and Filter' button to the right-hand side of your screen and select 'Filter' from the drop-down menu (Alternatively, use the short cut keys Ctrl + Shift +L).



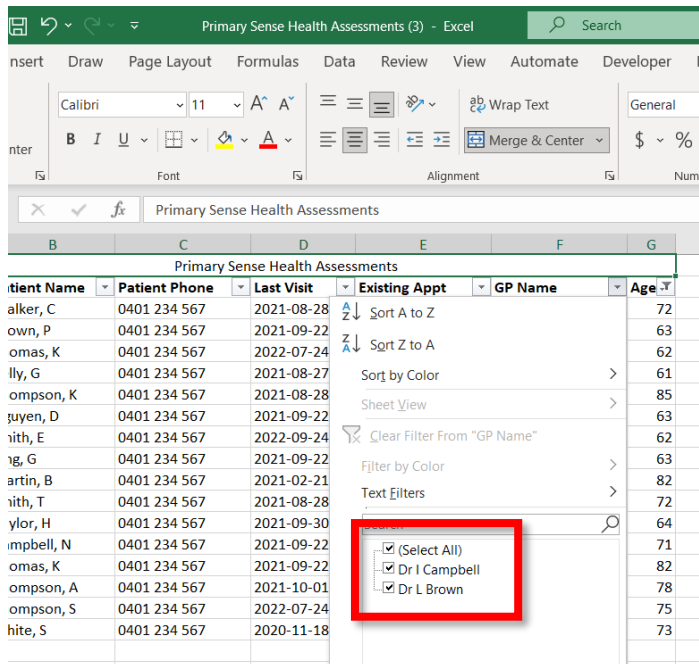
Once selected, you will see arrows appear at the top of each column.



Click the arrow next to 'age'.

In the drop-down list that appears, un-tick the 'Select All' box to de-select all ages, then scroll down and re-tick only the age groups of interest.

You can now further filter for GP so that a list can be printed and given to each GP responsible if required by choosing the drop-down arrow next to the GP Name column.



Note: Filtering can be completed upon any column available within an Excel report by using the above process and any of the drop-down arrows next to the column name. In this way, you can filter for any of the vaccines given, certain conditions, appointment date etc to build your custom report.

Once you have completed filtering, click 'File' and choose 'Print' from the drop-down menu, or alternatively use short cut 'Ctrl + P' to print your results.