Instructions to identify patient insurance coverage in the Cerner 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 Cerner 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

Cerner has several reporting tools available to identify patients who have been prescribed specific medications and to evaluate their insurance coverage. A dynamic worklist may be used, as it is an easy-to-use reporting solution available to many end users.

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

There are several options available to identify patients who are currently using a specific medication and have drug coverage. One of the options is to use a Dynamic Worklist.

1. Select **Dynamic Worklist** from the menu. The Dynamic Worklist wizard will display.
2. Select **Create Worklist** from the the **List Actions** drop-down menu.
3. The Create New Worklist wizard contains 3 tabs: **1. Worklist Type**, **2. Criteria**, and **3. Summary.**
4. ***1. Worklist Type***
   - **a.** Enter a name in the field to define the patient list, for example: Patients with **<insert medication name>** and insurance coverage.
   - **b.** Select the radio button for **Group/Provider** or **Location** as desired. The Group/Provider and Location is based on the EHR's organizational structure.
   - **c.** Complete the **Group/Provider's Relationship Type** or the **Location's Facility**, **Building**, and **Unit**.
   - **d.** In the **Relationship Type**, select all desired roles (for example: Primary Care Physician, Nurse Practitioner, etc). This may vary based on how the EHR was set up.
   - **e.** Click **Next**.

   2. Criteria
   - **a.** Click on the **Financial Class** criteria to display all available options. Select all desired plans.
   - **b.** Click on the **Health Plan Type** criteria to display all available options. Select all desired plans.
   - **c.** Click on the **Medications** criteria. Enter **<insert medication name>** in the **Select One** field while leaving the radio button on **Name**.
   - **d.** Select medication name and click **Add** (located to the right) to save the selection.
   - **e.** Click **Next**.

   3. Summary
   - **a.** Review the selected criteria and click **Finish** to run the patient list.
   - **b.** In the panel with the filters on the left, click **Encounters** and select the desired encounter setting (e.g., inpatient and outpatient).
   - **c.** The names of patients will display. Clicking on the **List Actions** drop-down menu allows the user to export the list of patients to Excel by clicking **Export**.