

EPIC®

IDENTIFYING PATIENTS WITH CHRONIC SPONTANEOUS URTICARIA (CSU)

- Workflow for Identifying Patients With CSU in Epic® by Diagnosis
- Urticaria Activity Score 7 (UAS7)

INSTRUCTIONS

One of Epic's reporting solutions, SlicerDicer or Reporting Workbench, may be used to help identify patients with CSU and assess clinical factors of these patients, such as immunoglobulin E (IgE), complete blood count (CBC), complete metabolic panel (CMP), thyroid peroxidase antibody (anti-TPO), and chronic urticaria index. Consult your organization if administrative user rights are required to access the reporting solutions.

The inclusion criteria are:

- ICD-10: L50.1
- Other codes: L50.8, L50.9

Step 1:

Option 1 – SlicerDicer

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 **Diagnosis** folder
7. Select the **Diagnosis** filter from the available options
8. Enter diagnosis code **L50.1, L50.8, L50.9**
9. Click **Save As** to save the query and refine the query results
10. Export the new report to **Reporting Workbench** (this option is based on user security)
11. In the **General** tab, enter the desired **Report Name** and a **Description**
12. Click **Save and Run** to create the patient list. The list will display all patients matching the criteria

Option 2 – Reporting Workbench

1. Access **Reporting Workbench** (click the **Epic logo** > **Reports** > **My Reports**)
2. Navigate to the **Library** tab from the **Reports** menu
3. Enter "**generic criteria**" or "**find patients**" in the search field and click **Search**
4. Select the **Find My Patients – Generic Criteria** report and click **New**
5. The **Report Settings** field will display. Click the **Criteria** tab in the toolbar
6. Click **Add** new criterion and select a criterion. Enter "**diagnosis**" in the search field (Filter Criteria). Click **Finish**
7. Select **Diagnosis** by code and enter **L50.1, L50.8, L50.9**
8. Click the **Display** tab. Confirm the **Selected Columns** window (ie, First Name, Last Name, Primary Care Physician, Last Visit, Diagnoses, etc)
9. In the **General** tab, enter the desired **Report Name** and a **Description**
10. Click **Save** and **Run** to create the patient list. The list will display all patients matching the criteria
11. Select the **Filters** tab to narrow down the results by filter (optional)

Step 2 (OPTIONAL):

1. To reach out to patients, click the **Communication** button from the menu. There are 4 options available and patients will be sorted based on their preferred method of communication (the number indicates the number of patients):

- | | |
|-------------------|--|
| a. Mail | d. Do Not Contact (patients who have expressed to not be contacted and will not receive any outbound message) |
| b. Phone | |
| c. MyChart | |

This configuration guide provides step-by-step instructions for building and deploying UAS7 Data Capture in Epic.

Option A – Flowsheet + SmartForm (Ambulatory recommended)

1) Flowsheet Rows (FLO)

- Create rows:
 - UAS7 Daily Hives (0–3)
 - UAS7 Daily Itch (0–3)
 - UAS Daily Score (0–6) (calculated or entered; if calculated, enforce Hives+Itch)
- Group rows into a **Flowsheet Template** (eg, “Urticaria – UAS7 Daily”)

2) SmartForm (SMF)

- Build a compact SmartForm where clinicians (or patients via rooming staff) can enter **7 days** of daily values in one screen
- Include **auto-sum logic** to produce:
 - UAS7 Weekly Total (0–42)
 - UAS7 Category (well-controlled/mild/moderate/severe)
- Store totals in **SmartData Elements (SDE)**:
 - SDE.UAS7_TOTAL (integer 0–42)
 - SDE.UAS7_CATEGORY (single-select)

3) SmartLinks/SmartText

- Provide **SmartLinks** to pull the values into notes:
 - Example: UAS7TOTAL → “UAS7 Total: 23 (Moderate)”

4) Patient-Entered Option (MyChart)

- If enabled, publish a **Patient-Entered Flowsheet** for UAS7 daily entries, with a weekly reminder. The SMF auto-aggregates to weekly

Option B – Questionnaire (MyChart) + Result Writeback

- Build a **Questionnaire** with 7 daily entries (hives 0–3, itch 0–3)
- On completion, a back-end **Rule** computes **UAS7 total** and writes to SDE + a **result component** so it displays in Results Review and is reportable

Minimum viable build if time-constrained: create just the **SDEs** and a small SMF that calculates the weekly total and category; skip daily capture initially

1) Show UAS7 Where It Matters

- **Visit Navigator/SmartForm activity**: add your **UAS7 SmartForm** to the relevant Navigator sections (eg, **Rooming, Assessment, or Disease Activity**)
- **Note templates (SmartTexts)**: embed the SmartLinks so UAS7 appears in clinician documentation automatically

2) Order Content & Form Launch

2A) Medication & Formulary

- Confirm **Medication** is present with correct dosing in your **formulary** and **preference lists**
- For ambulatory workflows, ensure **ambulatory Rx** & coverage restrictions are represented if your site manages PA steps inside Epic

3) Security & Access

- **User templates/roles:** grant access to:
 - **Media Manager** import/finalize for designated roles
 - **UAS7 SmartForm** and SDEs for clinician roles
 - **Order Set/SmartSet** for dermatology, allergy/immunology, and ordering providers
 - **Fax Utility** for biologics coordinators and clinic staff
- **Department/Location scopes:** confirm ambulatory departments (dermatology) have the new tools in their profiles

4) Reporting & Monitoring

- **Reporting Workbench (RWB):** build a **patient list** report to track:
 - Patients **on advanced therapy** in the last X days
 - Latest **UAS7 total & category** (from SDE)
 - **Form status** (Draft/Final)
 - **Fax status** (Sent/Failed/Queued)
- **Dashboard tile** (optional): show counts of forms finalized and faxed, and the percentage with a current UAS7

5) End-User Enablement

- One-page tip sheet (screenshots): where to find **UAS7**, how to open **Start Form**, how to **fax**
- Quick huddle with clinic staff and biologics coordinators

Appendix – UAS7 Quick Reference (for clinical staff)

- **Daily scoring (each day for 7 days):**
 - Hives: 0 none, 1 mild (1–6), 2 moderate (7–12), 3 severe (>12)
 - Itch: 0 none, 1 mild, 2 moderate, 3 severe
 - **Daily UAS** = hives + itch (0–6)
- **Weekly UAS7** = sum of 7 daily UAS values (**0–42**)
- **Categories:** 0–6 well-controlled; 7–15 mild; 16–27 moderate; 28–42 severe

LIMITATIONS AND NOTES

Novartis is not responsible for the implementation, testing, and ongoing operation of any electronic health records tools. If you have any questions pertaining to the use of these guides, please refer to your internal IT/IS department. These tools are not designed for, and have not been demonstrated to meet, any accreditation requirements. The instructions included in this brochure are applicable to the Epic platform and are not guaranteed to work for any other software platforms.

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