

# HSAG-AAFP METRIC Hypertension Study

Project Support Provided by Novartis Pharmaceuticals Corp.

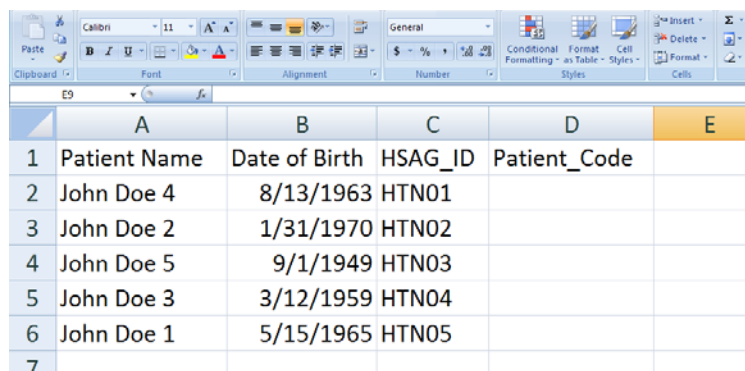
## VERIFYING PATIENT ELIGIBILITY AND ASSIGNING THE METRIC ID #

The purpose of this document is to supplement the Web Ex for Training Session IV to assist the participating physician practices with:

- Understanding what HSAG did with the Master List of eligible patients that you submitted on the CD.
- Verifying that the patients meet the secondary eligibility criteria for the METRIC intervention hypertension study.
- Documenting the METRIC assigned unique patient code and providing the information to HSAG.
- Understanding what will happen when you are ready for remeasurement after your six-month intervention period.

### 1. What will HSAG do with my list of patients?

When HSAG receives your CD/floppy disc, our study team will randomly sort the patients on the pre-intervention patient list and assign a unique number for study identification purposes. HSAG will mail back the entire list of patients in the same CD/floppy disc in a secured envelope. The returned list will have the original columns (unique patient number or patient name and date of birth) and two additional columns. HSAG will create a new column called HSAG\_ID and another column (blank) called Patient\_Code in the Excel spreadsheet (see screen print below).



	A	B	C	D	E
1	Patient Name	Date of Birth	HSAG_ID	Patient_Code	
2	John Doe 4	8/13/1963	HTN01		
3	John Doe 2	1/31/1970	HTN02		
4	John Doe 5	9/1/1949	HTN03		
5	John Doe 3	3/12/1959	HTN04		
6	John Doe 1	5/15/1965	HTN05		
7					

The HSAG\_ID column will contain a unique HSAG\_ID for each patient listed in the Excel spreadsheet and will be used by HSAG study team to conduct review and perform analyses without using the patient’s name or date of birth.

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The Patient\_Code column will contain a unique patient identifier that you will obtain when you input your patient information in the METRIC online database.

### **2. What do I do when I receive the returned patient list from HSAG?**

When you receive the patient list sent by HSAG, you will retrieve the medical records of the patients listed based on the order provided in the list. You will need to confirm that essential hypertension is listed on the selected patient's current problem list. If essential hypertension is not listed, the record will be excluded from the study and you will select the next patient on the list. When essential hypertension is confirmed on the patient's current problem list, you will then confirm that the patient DOES NOT have any of the following comorbidities on the current problem list:

- Chronic kidney disease (ICD-9 codes 585.x, 586, 587)
- Coarctation of aorta (ICD-9 code 747.1)
- Cushing's syndrome (ICD-9 codes 255.xx)
- Chronic steroid therapy (ICD-9 code V58.69)
- Pheochromocytoma (ICD-9 codes 194, 227)
- Renovascular hypertension (ICD-9 codes 403.xx)
- Hyperthyroidism (ICD-9 codes 242.xx)

If the patient's current problem list contains any of the above co-morbidities, the record will be excluded from the study and you will select the next record from the list again. If the selected patient meets all of the eligibility criteria for inclusion in the study, the record will be abstracted using the online METRIC Hypertension Patient Chart Review data collection tool.

When you start the METRIC online module and log onto the METRIC Web site (training information is available in Training Session III), you can input the patient information into the METRIC online tool. You will obtain a Patient\_Code number provided by AAFP for each patient (see screen print below). You can copy the Patient\_Code numbers into the Excel spreadsheet that was provided by HSAG.

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## METRIC Online Data Entry

**METRIC**  
Measuring, Evaluating, and Translating Research Into Care. **Hypertension: Improving P**

3. My Patient Chart Review (Baseline) Help with this Step

Note: A red asterisk denotes that a question is required.

[Download Chart Review PDF for offline data collection.](#)  
[View more information about PDFs](#)

**Chart Review**

Patient Code

Does the chart reflect that the patient's blood pressure was measured in the office within the  Yes

## Patient List

A	B	C	D
Patient Name	Date of Birth	HSAG ID	Patient_Code
John Doe 4	8/13/1963	HTN01	PC95439
John Doe 2	1/31/1970	HTN02	
John Doe 5	9/1/1949	HTN03	
John Doe 3	3/12/1959	HTN04	
John Doe 1	5/15/1965	HTN05	

Each participating physician will abstract 11 patient records for the pre-intervention data. After you finish entering the data and copy the Patient\_Codes for all 11 patients, you can fax the patient list back to HSAG. You do not need to fax the entire Excel spreadsheet, but just the pages that contain the eleven patients whose records are abstracted for the study. To ensure patient privacy, HSAG encourages the physicians to only fax the last two columns (i.e., HSAG-ID and Patient\_Code) back to HSAG. If you are faxing the Excel spreadsheet to HSAG, please indicate in the cover sheet the name of the physician.

	C	D	E
1	HSAG_ID	Patient_Code	
2	HTN01	G15692	
3	HTN02	G15695	
4	HTN03	G15700	
5	HTN04	G15701	
6	HTN05	G15703	

**3. What happens after I finish the METRIC intervention? How do I prepare the list of patients eligible for post-intervention phase of the study?**

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Similar to the pre-intervention period, you will need to help HSAG identify all patients with the following characteristics who are eligible for the remeasurement period:

- Had at least one office visit (for any reason) from June 1, 2010, to Feb 28, 2011
- Diagnosis of hypertension (ICD-9 code 401.x) established on or before June 1, 2010
- Had at least one office visit (for any reason) from March 1, 2011, to May 31, 2011
- Adults ages 18–65 years old

You will receive another package with a pre-paid secured envelope and a CD/floppy disc to save your post-intervention eligible patient list. You will prepare the list of post-intervention eligible patients in the same manner as you prepare the pre-intervention patient list. When you save the post-intervention patient file to HSAG, please label the file name as follows:

Remeasurement\_HTN\_<physician first name>\_<physician last name>\_<date the list is generated>. The date should use a two-digit number for the month, followed by a two-digit number for the day of the month, followed the last two digits of the year.

Example: Remeasurement\_HTN\_Marcus\_Welby\_062111

HSAG will again sort the patient list in a random order and assign new HSAG\_ID with each post-intervention eligible patient. The only difference is that instead of having the participating physicians or designated staff abstract patients' medical records, HSAG will send its reviewers on-site and conduct the medical record abstraction.

HSAG will coordinate with the participating physicians to schedule a particular date for this on-site abstraction activity. Since HSAG reviewers will also be abstracting some information from the pre-intervention patients' medical records, HSAG will mail out in a secure envelope two patient lists to the participating physicians prior to the on-site visits. The first list contains the identification information of the pre-intervention patients selected for the study; the second list contains those of the post-intervention patients. The participating physicians or their designated staff should retrieve medical records of these patients before HSAG reviewers arrive for the on-site abstraction.