

# HSAG-AAFP METRIC Hypertension Study

Project Support Provided by Novartis Pharmaceuticals Corp.

## INSTRUCTIONS FOR PREPARING A MASTER LIST OF ELIGIBLE PATIENTS

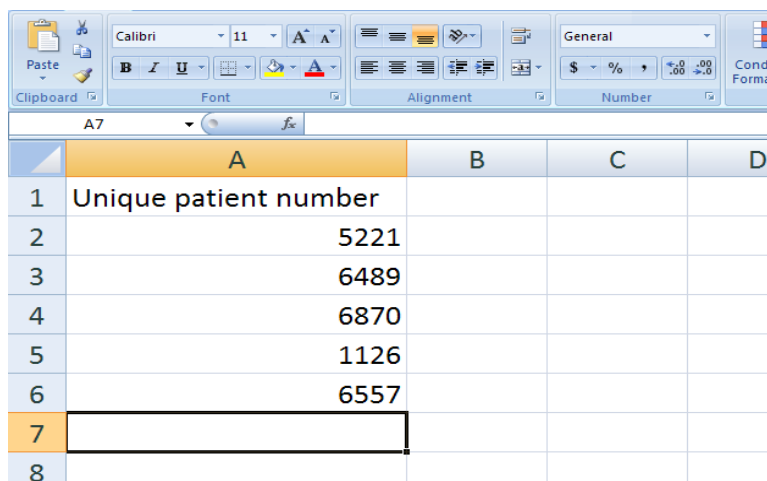
The purpose of this document is to supplement the information provided in WebEx Training Session II to assist the participating physician practices with how to prepare a list of patients who are eligible for the METRIC intervention hypertension study.

### 1. How do I prepare the list of patients eligible for pre-intervention phase of the study?

Identify all patients with all of the following characteristics:

- Adults ages 18 and older but younger than 65
- Diagnosis of hypertension (ICD-9 code 401.x) established on or before July 1, 2009
- Had at least one office visit from July 1, 2009 to March 30, 2010 with any of the following CPT codes: 92201-92205; 99211-99215; 99385, 99386; 99395, 99396
- Had at least one office visit from April 1, 2010 to June 30, 2010 with any of the following CPT codes: 99211-99215; 99395, 99396

If your existing patient medical record system allows you to produce this list without the patient’s name and date of birth, please use the unique patient number that you will use for record retrieval. You will need to open a new Excel file and enter the unique patient number in the first column (Column A, see screen print below). Please note that this number will be used by you again to retrieve the same patient records when HSAG reviewers conduct on-site record review after the METRIC intervention.

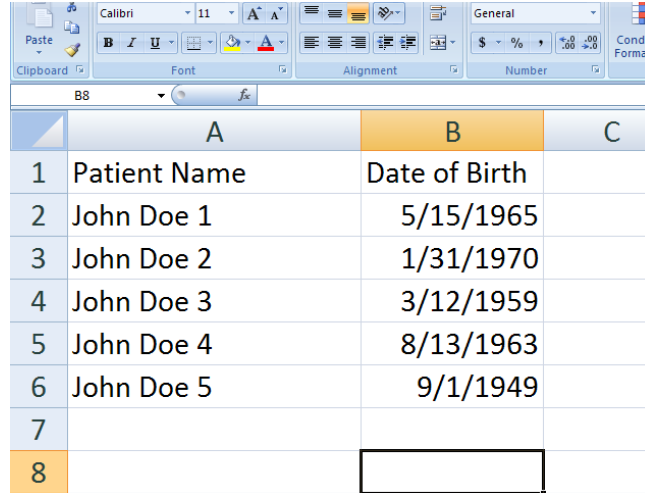


	A	B	C	D
1	Unique patient number			
2	5221			
3	6489			
4	6870			
5	1126			
6	6557			
7				
8				

If your existing patient medical record system does not allow you to produce a list with unique patient numbers, please provide a list of eligible patients with the patient’s name and date of birth. You may prepare the list by typing the patient’s name and date of birth in an Excel spreadsheet (see screen print below). Please note that the patient’s name and date of birth will be

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used by you again to retrieve the same patient records when HSAG reviewers conduct on-site record review after the METRIC intervention.



	A	B	C
1	Patient Name	Date of Birth	
2	John Doe 1	5/15/1965	
3	John Doe 2	1/31/1970	
4	John Doe 3	3/12/1959	
5	John Doe 4	8/13/1963	
6	John Doe 5	9/1/1949	
7			
8			

When you save the Excel file in the CD/floppy disc, please label the file name as follows: Baseline\_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 by the last two digits of the year.

Example: Baseline\_HTN\_Marcus\_Welby\_062110

If you have a reporting system that can generate the list, please save the report in Excel (xls) or common separated value (csv) format.

If your medical record system does not allow you to produce a single list containing all four criteria listed above, it is acceptable to produce more than one list and send to HSAG. For example, if it is difficult for your medical record system to produce the list of patients with the last two criteria together, you may generate one list of patients who are eligible based on the first three criteria and another list of patients who are eligible based on the first two and the last criteria. You will need to save each list with a slightly different file name. Following the same example, you may label the file name as follows:

Example:

Baseline\_HTN\_Marcus\_Welby\_062110\_A

Baseline\_HTN\_Marcus\_Welby\_062110\_B

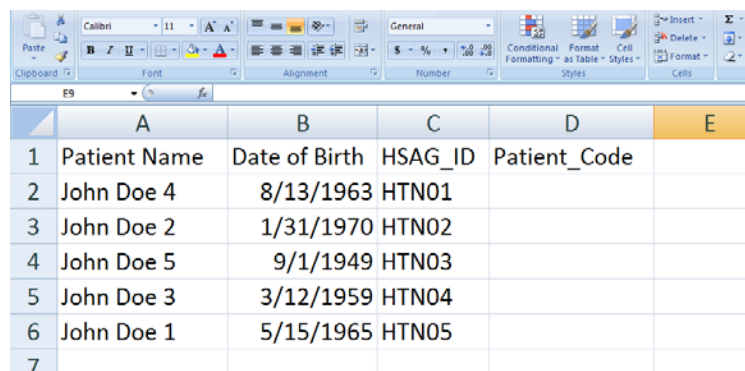
You will receive a package from HSAG that contains either a CD or a floppy disc, and a pre-paid secured envelope. The CD/floppy disc will have a label with the study name and your name on it. You will save your pre-intervention eligible patient Master List to the CD/floppy disc and use the pre-paid envelope to Fed Ex the CD/floppy disc back to HSAG.

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

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When HSAG receives your CD/floppy disc, our study team will sort the patients on the pre-intervention patient Master List randomly and assign a unique number for study identification purpose. If you send HSAG multiple lists, HSAG will first merge all the lists together in order to obtain a single list of eligible patients before the random assignment.

HSAG will FedEx back the entire list of patients to you 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 METRIC\_Patient\_Code in the excel spreadsheet (see screen print below).



The screenshot shows an Excel spreadsheet with the following data:

	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 the HSAG study team to conduct review and perform analyses without using the patient's name or date of birth.

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

**When HSAG returns the CD to you with the randomized list of names, you will be receiving further instructions for how to proceed with the randomized list to retrieve records, and how to verify the patient's continued eligibility using secondary criteria.**

**Before attempting to create the Master List, please be sure to view the WebEx Training Session II at [www.hsag.com/services/special/MetricHTN.aspx](http://www.hsag.com/services/special/MetricHTN.aspx). If you have any questions, please send them to [MetricHTN@hsag.com](mailto:MetricHTN@hsag.com). Thank you.**