

### Information about inactive patients showing in the report

- Q. *How do I run reports (including the summary report), say for the last calendar year and exclude those made inactive by the end of the year? or made inactive any other date?*

*Example: Several of patients were inactivated on 6/10/04 and 8/18/04. The time period for my report is 8/1/03 - 7/31/04...but they still show in the report that I ran.*

If a patient is active for even one day during the summary report time period, they are included in the total patient count. All of your patients with 6/10/04 end dates would therefore be included in the summary. Information about their labs, services, meds, etc. occurring within the time period are included in this analysis. The patients with end dates of 8/18/04 are also counted since they became inactive after the time frame for the report.

To exclude inactive patients from your current summary report, the patient end date must be prior to the start of the reporting time period (for example -- 1/1/03) so that they are inactive during the entire time period of the report.

In CDEMS, entering an inactive date on the Edit Patient Info screen is all that's needed to make a patient inactive. The reports program evaluates registry start and end dates (in tblDemo) to determine whether a patient was active in the time period for inclusion in the summary reports or intervention lists. The DM diagnosis date is also considered by the reports program to include only patients who have a diagnosis date for the selected health condition prior to or within the report time period.

Three key dates described below are evaluated around the time period dates defined on the Reports opening screen. Summary reports include patients in the counts and percentage calculations if:

1. The patient is active in the registry

++ registry start date in tblDemo is prior to the report end date  
++ inactive date (end date in tblDemo) is either null or within the time period of the report

2. The patient has a diagnosis date for the health condition being evaluated prior to or within the report time period

++ diagnosis start date (tblHealth) prior to the report end date  
++ diagnosis end date is either null or within the time period of the report

3. The most recent date of a "completed" event (visit, related Dx, lab, service) is within the report time period

++ In the user-defined list template, an empty cell in the resulting list indicates that the patient has NOT had a visit, lab, service completed within the report time period - e.g. a patient without a visit during 2004 would have a blank cell in the last visit column of the table if you were evaluating calendar year 2004. This allows for filtering the list on patients who are "missing" items.

If a patient is active in the registry for even a single day during the report time period, they are included in both the pre-coded and user-defined reports and lists. The inactive date recorded for patient who is no longer active is critical and gives you some control about when they fall off the radar as active patients. The last visit date is a more accurate reflection of the patient's last activity.

**Tip #1** Use the patient's *last visit date* as the end date rather than the date the inactivation is recorded in the registry. The last visit or last lab date is more accurate and removes the patient from CDEMS reports and lists in a more timely way.

**Tip #2** When entering a patient end date, add a short note in the "Other" note column to document the reason for the inactivation – unable to contact, deceased, moved, changed providers, etc.

I hope that this will clarify the issue of inactive patients in the report