MEDICAL DIRECTOR: CREATING 3 SEPARATE COHORTS

Please note the following limitations

▷ MD terms listed below will be available from July 2021.

- heart failure with reserved ejection fraction (HFrEF)
- heart failure with preserved ejection fraction (HFpEF)

▷ Only patients who have coded terms (chosen from a drop-down window) will display in the list.

Step 1: Create the cohorts

▷ Cohort 1. All patients with heart failure (ever) includes those with:

- heart failure with reserved ejection fraction (HFrEF) and/or
- heart failure with preserved ejection fraction (HFpEF) and/or
- other relevant terminology for heart failure

▷ Cohort 2. All patients with HFrEF (ever) only

▷ Cohort 3. All patients with HFpEF (ever) only

1. Open Medical Director. Do not open any patient records.

2. Locate the **Search** menu option on the main window menu (8th across)

3. Click on **Search – Patient**. The **Patient Search** screen will display.

   a. Sections include Demographic, Smoking, Drug/Condition, Visit and Custom.

4. Move your mouse down and click on the **Condition** radio button.

   a. Then move over to the entry field and type *Heart Failure*. Select the appropriate term from the list and click on the **Add to search criteria**. You will notice the search begin to build in the **Search Criteria** section at the bottom of the page.

   b. To select all **Heart Failure** terms, click on the **OR** checkbox, hold Ctrl or Shift and select the remaining heart failure terms, click **Add to search criteria** again and they will appear in the criteria section at the bottom of the page.

5. **Cohort 1** has now been created. Press the **Search** button. A screen of all patients who match the search for cohort 1 will display. There are options to:

   a. **Open** each patient.

   b. **Add a recall**

   c. **Save** the query – hint – save it as a name you will remember – Heartfailure.DBF

   d. **Print –** the list of patients

   e. **Mail merge;** or

   f. **Close**

To create **cohort 2**, repeat the process including only terms related to HFrEF in the entry search field

To create **cohort 3**, repeat the process, including only terms related to HFpEF in the enrty search field

Note: This process will allow you to produce 3 reports; one for each cohort (1, 2, and 3)

Step 2: Select the cohort relevant to the improvement indicator of interest.

Build on the relevant cohort (your denominator) to find the indicator measure (numerator) of interest

Examples have been included to calculate the following:

▷ **All patients with heart failure who have a classification of HFrEF or HFpEF recorded.**

▷ **All patients with heart failure who have had a GPMP or TCA or CVC program developed or reviewed in the last 12 months**

▷ **All patients with heart failure who have had a HMR or RMMR in the last 12 months**

Find instructions for these searches on our website at https://www.nps.org.au/heart-failure-measures under the relevant indicator.