

Provider Filtering



Please note that this filter is currently not able to find patients that were seen by a provider in a particular date range. As an example if you apply the 'date range visit' filter and filter for patients who have visited in the last 12 months only, and then select a particular provider with the 'any visit to provider' option, you will get a list of patients who have visited in the last 12 months and have been seen at least once by the selected provider in the last 3 years. In other words, the provider filter is not linked to the date range visit filter.

The provider filter allows you to filter patients by provider. This allows providers within your practice to drill down to their own patients. The filter will look at patient visits in the last 3 years only.

The provider filter tab displays a list of the practice clinicians with a provider number. You can filter by

- Practice – all providers are ticked
- One or more providers – tick those you wish to filter on and un-tick the 'No Assigned Provider' box
- No Assigned Provider – to find patients that are not assigned to any provider

Providers with No Patients

There may be providers in your database that are not attached to any patients. For example, this can occur in MD when a patient is imported from another practice and the providers attached to the patient are imported as well to keep the patient history complete.

Providers with no patients attached to them are hidden by default. The checkbox 'Hide Providers with No Patients' is ticked by default. To see all Providers un-tick this box.

The screenshot shows the 'Providers' filter tab with the following data:

Name	Provider No.	Role	Phone (H)	Phone (W)	Phone (M)
<input checked="" type="checkbox"/> Dr Locum	0305812K	DOCTOR		07 7878 7878	
<input checked="" type="checkbox"/> Dr. A. Practitioner	2426621B	DOCTOR		02 9908 4888	

At the bottom, the 'Change filter:' dropdown is set to 'Filter by Assigned Provider'. Other options include 'Include Patients with No Assigned Provider' (checked), 'Select All/None' (checked), and 'Hide Providers with No Patients' (checked).

The default for this filter is to filter by assigned provider, but this can be changed to filter by visits to any provider. If filtering for any visit to provider is selected the filter will display any patient with at least one visit to the selected provider.

The screenshot shows the 'Providers' filter tab with the following data:

Name	Provider No.	Role	Phone (H)	Phone (W)	Phone (M)
<input checked="" type="checkbox"/> Dr Locum	0305812K	DOCTOR		07 7878 7878	
<input checked="" type="checkbox"/> Dr. A. Practitioner	2426621B	DOCTOR		02 9908 4888	

The 'Change filter:' dropdown is highlighted with a red box and set to 'Filter by Any Visit to Provider'. Other options include 'Select All/None' (checked) and 'Hide Providers with No Patients' (checked).

Filtering by any visit can be used to exclude patients who have visited only a specific provider, such as an allied health provider or other if the aim of the filter is to show only patients seen at least once by a doctor. This filter can also be combined with the date range visit filter. Please note that this filter is not linked to the 'active patient/3 visits x 2 years' filter, as an active patient is defined by 3 visits in 2 years to the practice, and not to an individual provider.