Cancer Screening Resumption in the Primary Care Setting Primary Care Provider

Screening Activity Report (SAR) Guide
for Primary Care Providers

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1.0 Purpose

The purpose of this document is to outline available reports within the Screening Activity Report (SAR) that primary care providers can use to create patient lists to assist with resumption of cancer screening activity for the three screening modalities: breast, colorectal and cervical.

2.0 SAR Guide by Screening Modality

For each cancer screening modality, you will find available reports within SAR and a step-by-step guide to find the list of patients who meet requirements for resumption of screening based on modality and guidelines.

2.1 Breast Screening

Step-by-Step Instructions:

1. From the Dashboard, select the **numbered link** for "Overdue for screening" under "Breast Screening" column (*Screenshot #1*).
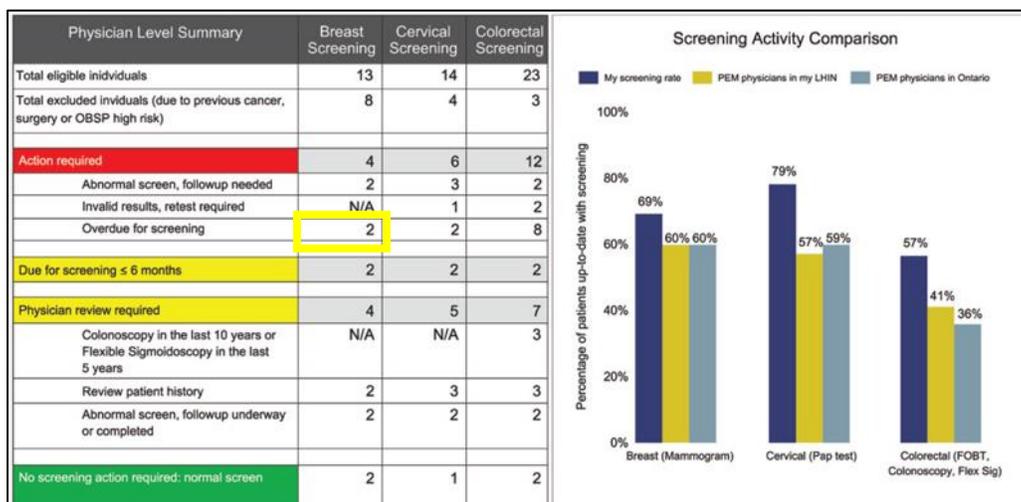
*Screenshot #1: SAR Dashboard with numbered links.*

2. When the list populates, select the **sorting arrow** beside date until it sorts the list with blank date fields at the top (*Screenshot #2*). This will give you a list with patients **never screened** at the top followed by patients that are the most over due.

Screenshot #2: Sorting arrow in populated list from numbered link in Dashboard.

Note: If you have access to Microsoft Excel, please continue to Step 3. If you do not have this access, you can work off this patient list from your computer screen.

3. To further sort the patient list based on screening criteria advised during the COVID-19 pandemic, you can **export** the list into an Excel document. To export the list, click the drop down button for "**Action**" at the top left of the SAR report, select "Export" and then "Excel" (*Screenshot #3*).
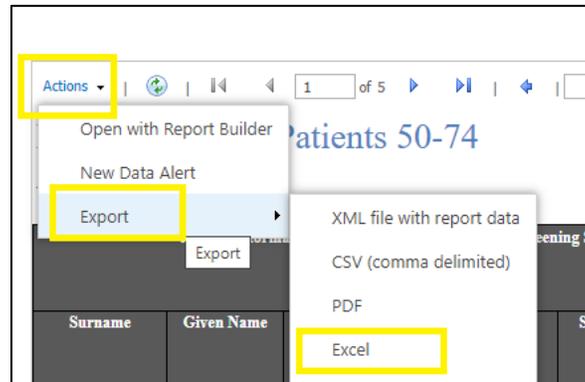
Screenshot #3: Exporting a SAR patient list as Excel document.

4. Once in the Excel spreadsheet, you will want to **unmerge cells** for easier sorting.

  – Press "**Ctrl + A**" to select the entire spreadsheet data and then select "**Merge & Centre**" and "**Unmerge Cells**" under the Home tab (*Screenshot #4*).
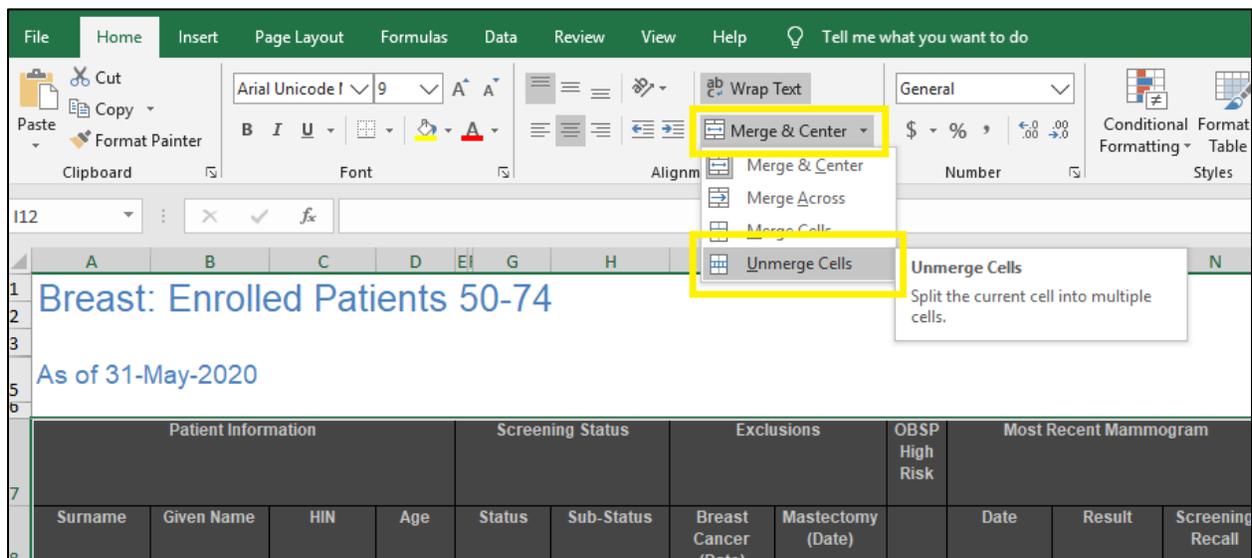
Screenshot #4: Unmerging cells in Excel to allow for sorting.

5. Once the cells are unmerged you can **delete unnecessary column and rows** by right clicking the top of the column (i.e. the letter associated with the column) and the far left

of the row (i.e. the number associated with the row) and selecting "Delete" (*Screenshot #5*).
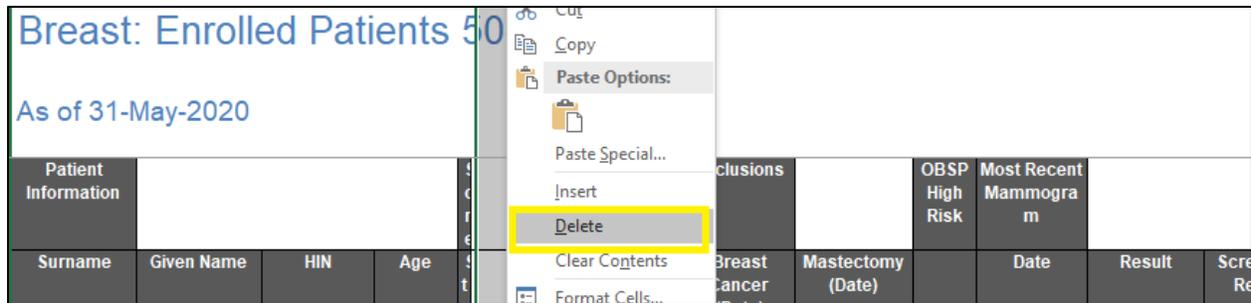

Screenshot #5: Menu when a column or row is right-clicked.

6. The columns required to find eligible patients and should not be deleted are:
   - "**Surname**"
   - "**Given Name**"
   - "**HIN**"
   - "**Age**"
   - "**Status**"
   - "**Sub-Status**"
   - "**Date**"
   - "**Result**"
   - "**Screening Recall**"

7. At this point you will want to **remove the hyperlinks.** This will ensure links are not accidentally clicked during sorting:
   - Press "**Ctrl + A**" to select the entire spreadsheet data
   - **Right click any cell** for the list shown in *Screenshot #6* to appear
   - Select "**Remove Hyperlinks**".
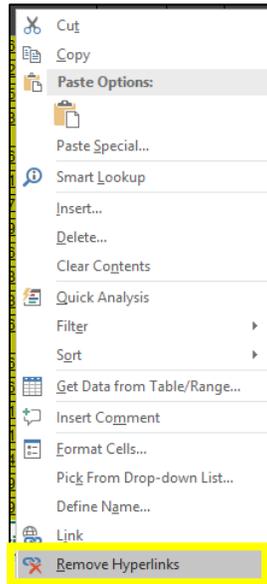
Screenshot #6: Menu when any cell is right-clicked.

8. Select all the patients with **no date** in the "Date" field by selecting all the patients' rows and fill with a colour of your choice by clicking on the "Home" tab, the drop down arrow beside the paint bucket icon, and the colour of your choice (*Screenshot #7*). These are your "Never Screened" patients *(Screenshot #8)*.
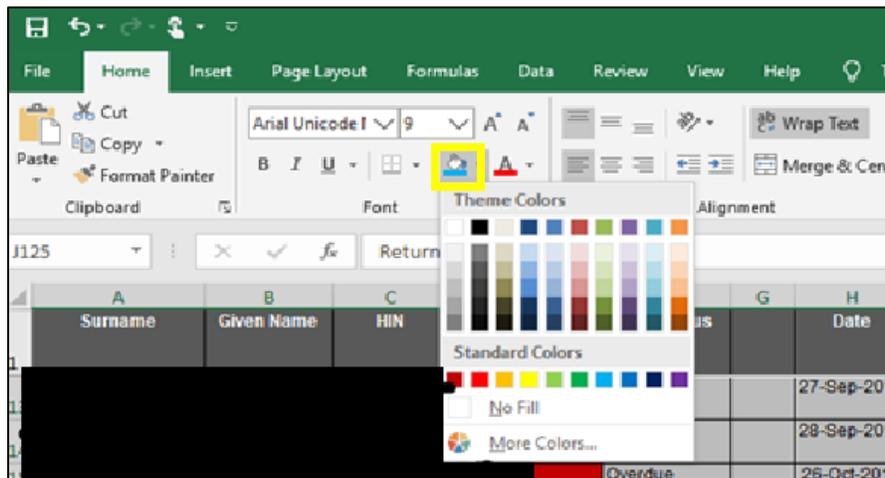
Screenshot #7: Colour menu in the Home tab to colour-code patients by status

Screenshot #8: Example of never screened patients in same colour.
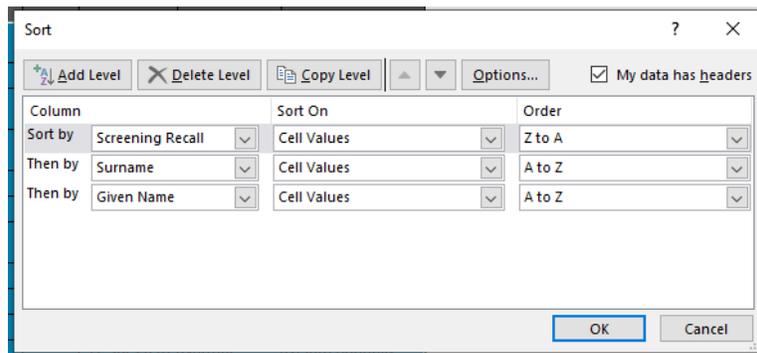
9. Press "**Ctrl + A**" to select all spreadsheet data and the select the "**Data**" tab at the top of the page and the "**Sort**" icon (*Screenshot #9*).
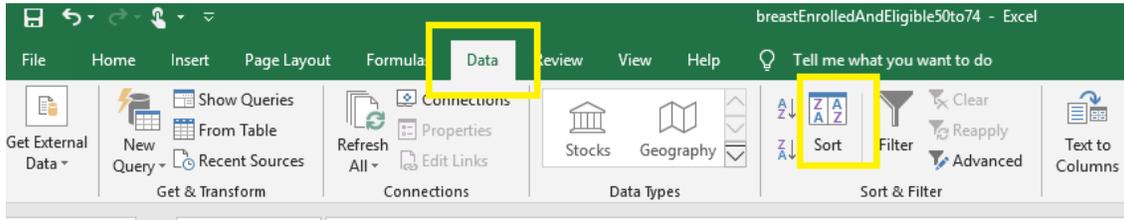
Screenshot #9: Data tab ribbon and Sort button.

10. From the Sort menu that pops-up, choose the following options using the "**Add Level**" to add more sorting options:

    – To find the "**Annual**" Screeners, refer to *Screenshot #10*

    Screenshot #10: Sorting options to select to find Annual screeners.

    – When the list is sorted, select all the patients with "**Return Annually**" AND "**Return 1 Yr**" and fill them with a cell colour of your choice as instructed above (*Screenshot #11a and #11b*).

    Screenshot #11: Return Annually (11a) and Return 1 Yr (11b) patients highlighted in same colour.

11. For the final sort, press "**Ctrl + A**" again to select all data, click the "**Data**" tab and "**Sort**" icon (*Screenshot #9*) and fill with the following sorting criteria (Screenshot #12).

    – The top cell colour will be **the colour you selected for patients with no dates** listed (never screened).

    – The second cell colour will be **the colour you selected for the "Annual Screeners"**
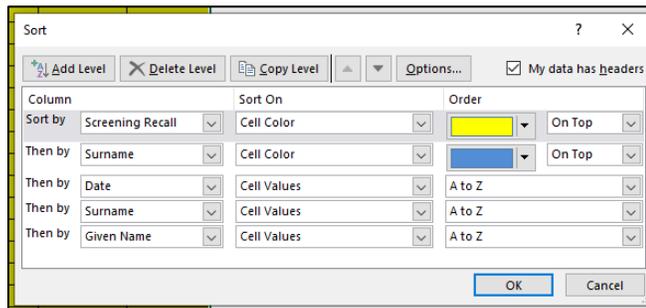
Screenshot #12: Sorting criteria for the final sort.

— The following warning will appear, select the top radial button and then "OK" (*Screenshot #13*).

Screenshot #13: Option to select in Warning screen

— The list will now be sorted with "Never Screened" at the top followed by "Annual Screeners" and then **in order from most overdue to least overdue** (*Screenshot #14*).

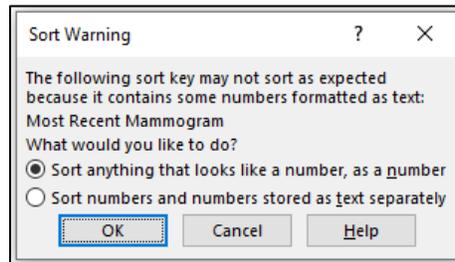| Age	Status	Sub-Status	Date	Result	Screening Recall
		Overdue			
		Overdue			
		Overdue			
		Overdue			
		Overdue		Normal	Return 1 Yr
		Overdue		Normal	Return Annually
		Overdue		Normal	Return Annually
		Overdue		Abnormal	Return 1 Yr
		Overdue		Normal	Return 1 Yr
		Overdue		Normal	Return Annually
		Overdue		Normal	Return 1 Yr
		Overdue		Normal	Return 1 Yr
		Overdue		Normal	Return Annually
		Overdue		Normal	Return Annually
		Overdue		Abnormal	Return 2 Yr
		Overdue		N/D	
		Overdue		N/D	

Screenshot #14: Final sort for breast screening patients based on 'most' overdue to 'least' overdue

2.2 Colorectal Screening

Step-by-Step instructions:

1. From the Dashboard, select the numbered link for "**Abnormal screen, follow up needed**" under "Action required" for Colorectal Screening (*Screenshot #15*). These numbers provide lists of patients who have screened positive and may not have had necessary follow-up testing based on screening modality (*Screenshot #16*).

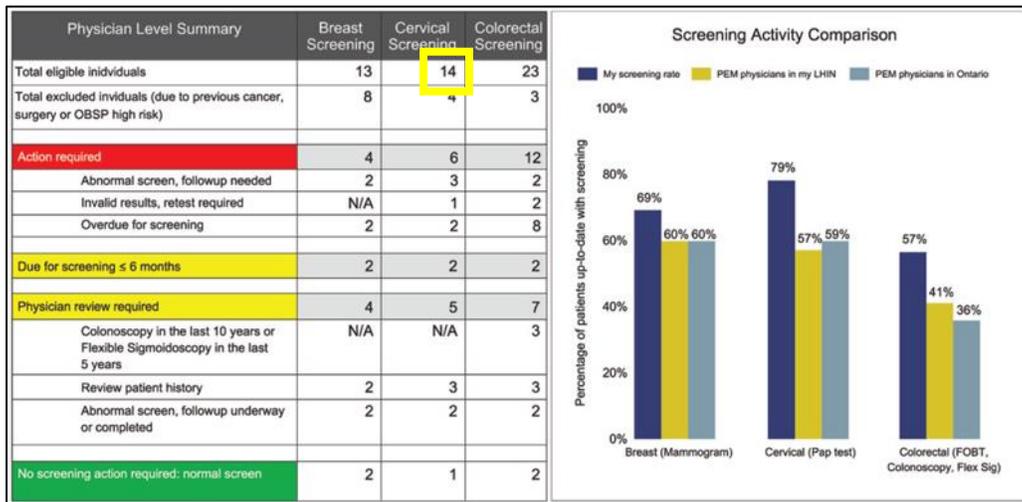*Screenshot #15: Numbered links based on screening modality of patients requiring action*

Screenshot #16: Example report of patients requiring action for colorectal screening.

2.3 Cervical Screening

Step-by-Step instructions:

1. From the Dashboard, select "**Total eligible individuals**" under "Cervical Screening" heading (*Screenshot #17*).

Physician Level Summary	Breast Screening	Cervical Screening	Colorectal Screening
Total eligible inidviduals	13	14	23
Total excluded inviduals (due to previous cancer, surgery or OBSP high risk)	8	4	3
Action required	4	6	12
Abnormal screen, followup needed	2	3	2
Invalid results, retest required	N/A	1	2
Overdue for screening	2	2	8
Due for screening ≤ 6 months	2	2	2
Physician review required	4	5	7
Colonoscopy in the last 10 years or Flexible Sigmoidoscopy in the last 5 years	N/A	N/A	3
Review patient history	2	3	3
Abnormal screen, followup underway or completed	2	2	2
No screening action required: normal screen	2	1	2

Screenshot #17: Numbered links in Dashboard with 'total eligible individuals' highlighted.

2. When the list populates, select the **sorting arrow beside date** until it sorts the list with blank date fields at the top. This will give you a list with patients never screened at the top followed by patients that are most over due and then up to date (*Screenshot #18*).


Screenshot #18: Sorting arrow beside date to bring patients with no date to the top of list.

Note: If you have access to Microsoft Excel, please refer to Steps #3 to Steps #5 in section **2.1 Breast Screening** to export the list and prepare the document for sorting. Once document is prepared, continue to Step #3 of this section. If you do not have this access, you can work off this patient list from your computer screen.

3. The columns required to find eligible patients and should not be deleted are:
    - "**Surname**"
    - "**Given Name**"
    - "**HIN**"
    - "**Age**"
    - "**Status**"
    - "**Sub-Status**"
    - "**Most Recent Pap**"
    - "**Result**"
    - "**Most Recent Abnormal Pap (OCSP Only)**"

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- "**Most Recent Follow-up/ Diagnostic Activity**"
- "**Type**"

4. At this point you will want to **remove the hyperlinks.** This will ensure links are not accidentally clicked during sorting:
   - Press "**Ctrl + A**" to select the entire spreadsheet data
   - **Right click any cell** for the drop down list to appear (*Screenshot #6*; *shown above*)
   - Select "**Remove Hyperlinks**".

5. Press "**Ctrl + A**" to select all spreadsheet data and the select the "**Data**" tab at the top of the page and the "**Sort**" icon (*Screenshot #9; shown above*).

6. From the Sort menu that pops-up, choose the following options using the "**Add Level**" to add more sorting options:
   - To find patients with **previous abnormal results**, refer to *Screenshot #19*:
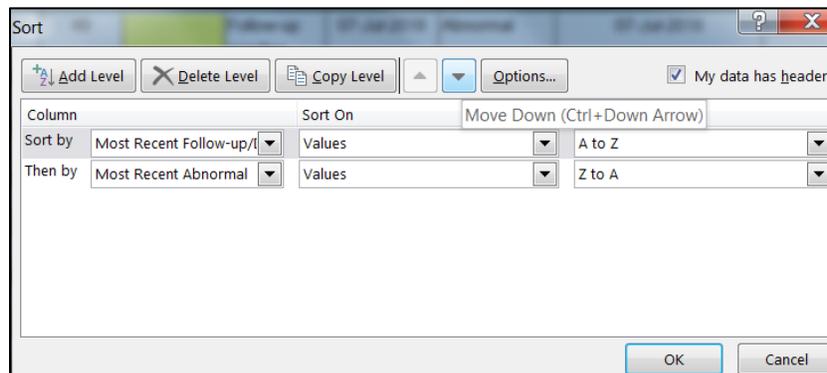
Screenshot #19: Sorting options to select to find patients with previous abnormal results

   - If the warning box appears, select the top radial button and "OK" (*Screenshot #13; shown above*)

7. When the list is sorted it will show all the patients that have had abnormal results with the **ones needing follow up sooner at the top of the list** (*Screenshot #20*):

Surname	Given Name	HIN	Age	Status	Sub-Status	Most Recent Pap	Result	Most Recent Abnormal Pap (OCSP only)	Result	Most Recent Follow-up/Diagnostic Activity	Type
							Abnormal		LSIL		Initial colposcopy
							N/D		LSIL		Initial colposcopy
							N/D		LSIL		Follow-up colposcopy without biopsy
							N/D		LSIL		Follow-up colposcopy without biopsy
							Abnormal		HSIL		Follow-up colposcopy without biopsy
							N/D		LSIL		Follow-up colposcopy without biopsy
							N/D		ASCUS		Follow-up colposcopy with biopsy
							Abnormal		LSIL		Initial colposcopy
							Abnormal		LSIL		Follow-up colposcopy without biopsy
							Abnormal		ASCUS		
							Normal		ASCUS		
							Normal		ASCUS		
							Normal		ASCUS		
							Normal		LSIL		
							Normal		ASCUS		

Screenshot #20: Final sort for cervical screening patients with more urgent follow-up dates at the top of list

3.0 Additional RCP Support

For regional cancer screening inquiries, contact Dr. Meghan Davis at dr.meghan.davis@gmail.com.

For SAR support & data-related inquiries, contact Britney Edmonds at martinbrit@hhsc.ca.