

# Hoag Clinic Quality: Cozeva User Interface Training

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# COZEVA: Intro

## **Why is it important to check Cozeva?**

Cozeva has accurate and updated patient clinical quality information that helps provide appropriate high-quality care for Hoag Clinic's managed care patients. The Point of Care (POC) tool helps identify open care gaps for quality and HCC codes that support Hoag Clinic's population health programs.

## **When should I check Cozeva?**

Daily Cozeva use is a part of the daily chart prepping process and goes side-by-side with standing orders. Checking Cozeva daily allows for open care gaps to be identified easily and for the clinical team and provider to take the necessary action to close the open care gaps, such as documenting appropriately within visit note, placing standing orders, and referring the patient appropriately.

## **How do I access Cozeva?**

There are 2 methods to access Cozeva: 1) Web Log-In, and 2) Cozeva Overlay



# Cozeva Web Log-In

# COZEVA: Logging In

1 In a web browser go to: [www.cozeva.com/user.login](http://www.cozeva.com/user.login)

Applied Research Works, Inc.  
**COZEVA**

Username \*

Enter your Cozeva username.

Password \*

Enter the password that accompanies your username.

Stay signed in

Forgot password or first time login?

[LOG IN](#) [Sign Up](#)

[Providers](#) [Developers](#) [Contact Us](#)

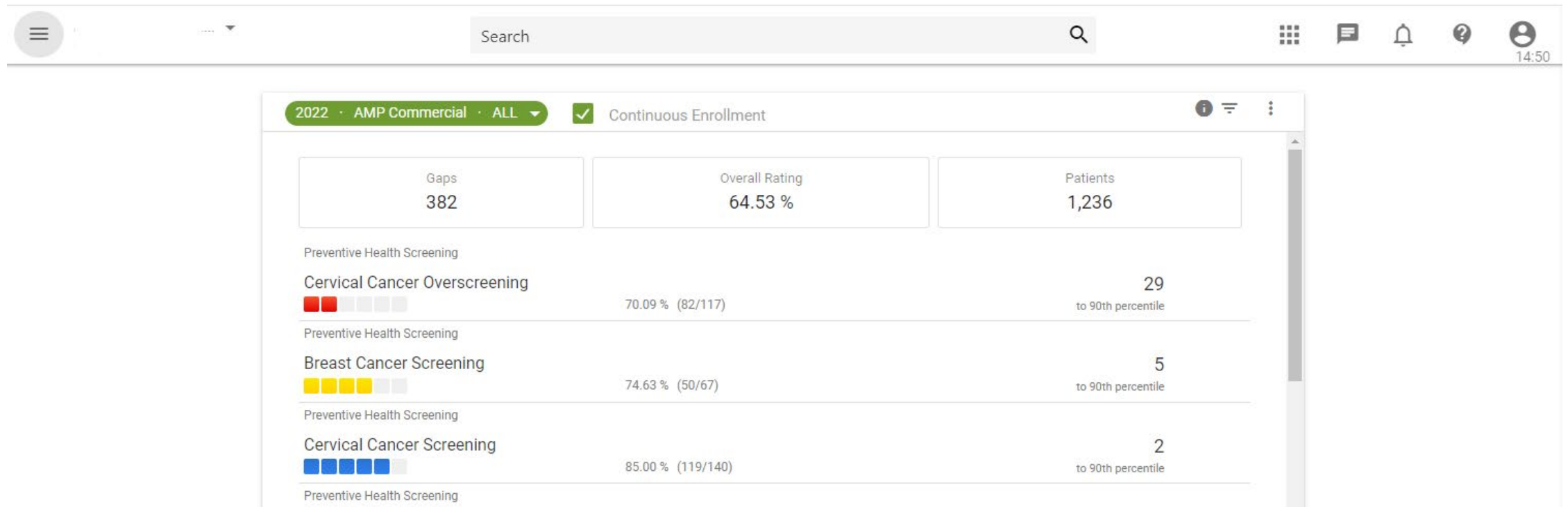
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Follow Us

- 1 Go to website
- 2 Enter Username
- 3 Enter Password
- 4 Click on "LOG IN"

# COZEVA: Default View

*This is the view after first logging in. The view shows the clinical site's quality performance scores for each measure for the default site. For users with access to only one provider it would be the same as the provider view.*



# COZEVA: Searching for a Patient

*Using the search-bar you can search for a patient by MRN, name, or health plan ID*



HOAG PHYSICIA...  
Hoag Clinic • Hoag Clinic

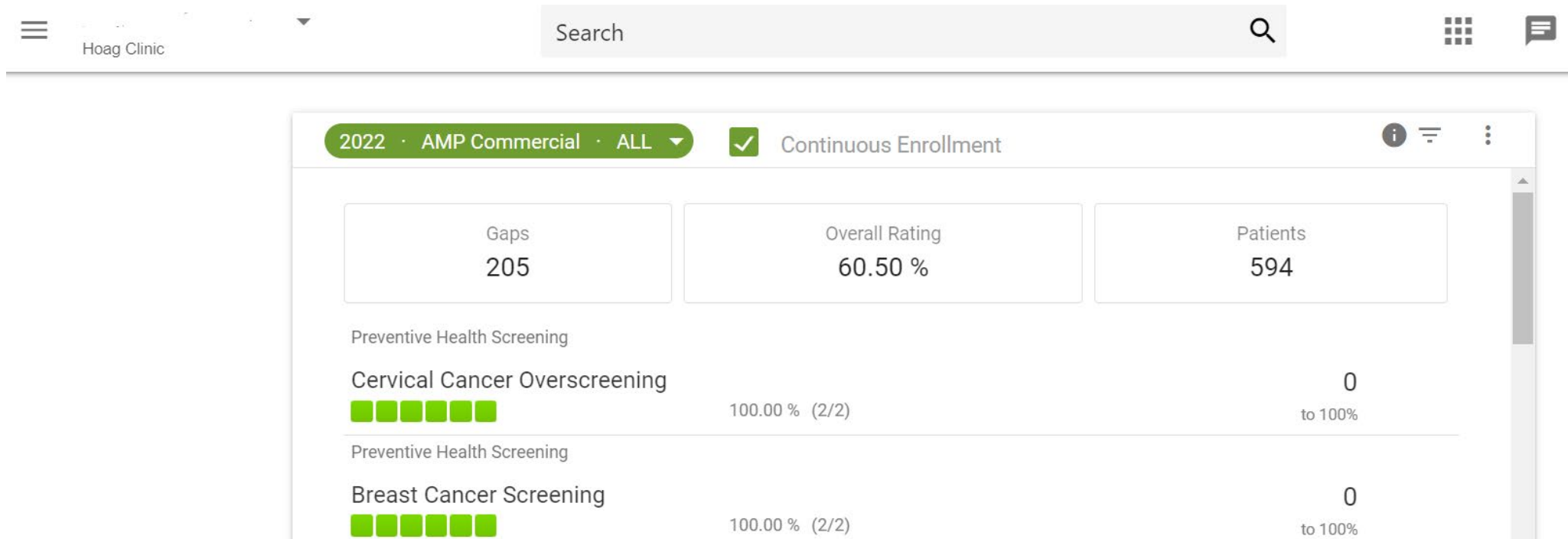
5 → Search 6 → 🔍



- 5 { Enter patient Name or MRN
- 6 { Click the search Icon or hit enter

# COZEVA: Provider View

*This is a view of the provider's quality performance scores for each measure. You can filter by line of business, year, and health plan.*



# COZEVA: Non-Compliant Measures

The screenshot displays a patient dashboard interface. At the top, there is a search bar and navigation icons. Below the search bar, the patient's name is partially visible as 'y ( )'. There are links for '+ Exclusion', '+ Add a race', and '+ Spoken Language'. The patient's insurance information is listed as 'Commercial · BSHMO · BLUE SHIELD HMO'. Other details include 'No past visit', 'Preferred Pharmacy: None', and 'Visited 07/27/2022'. The 'Care Ops' section shows '4 (0 HCCs)'. The main content area is divided into 'Quality Measures' and 'Events'. Under 'Quality Measures', there are two items: 'Breast Cancer Screening' (BCS - Preventive Health Screening) and 'Cervical Cancer Screening' (CCS - Preventive Health Screening). The 'Events' section shows a 'Timeline' for '2022 Events' with a specific event on 'JULY 27' titled 'Home sleep test (hst) with type iv portable monitor, unattended; minimum of 3 channels' and 'Sleep studv. unattended. simultaneous recording of. heart rate. oxvaen ...'.

*This is a view of the patient's dashboard which shows the patient's compliance status for each quality measure.*

# COZEVA: Non-Compliant Measures

The screenshot displays a patient's care dashboard. At the top, there is a search bar and navigation icons. Below this, patient information is shown, including insurance (Commercial, BSHMO, BLUE SHIELD HMO), visit status (No past visit), and pharmacy (Preferred Pharmacy: None). A 'Care Ops' section indicates 4 (0 HCCs) care gaps. A table lists two non-compliant measures: 'Breast Cancer Screening' (BCS - Preventive Health Screening) and 'Cervical Cancer Screening' (CCS - Preventive Health Screening). To the right, a 'Timeline' window shows a '2022 Events' entry for July 27: 'Home sleep test (hst) with type iv portable monitor, unattended; minimum of 3 channels. Sleep studv. unattended. simultaneous recording of. heart rate. oxvaen ...'.

7

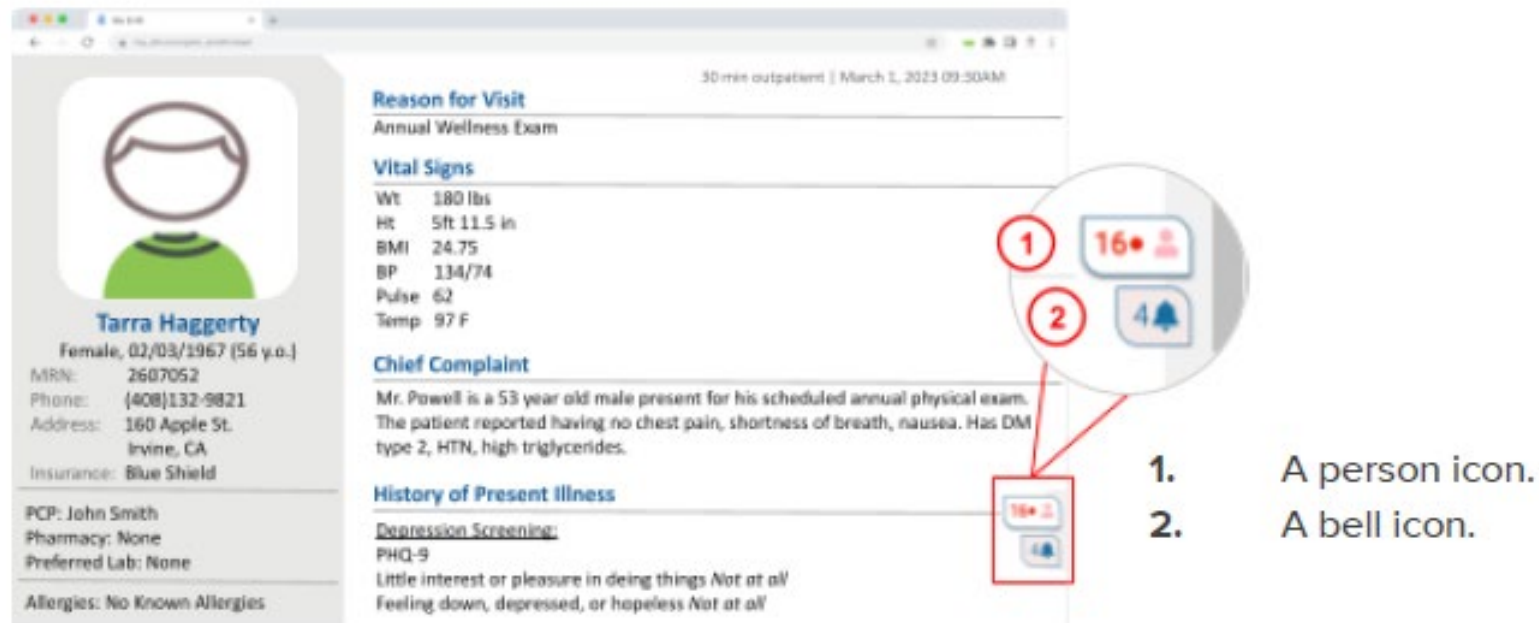
7 { Take action on Care Gaps



# CozevaConnect Overlay

# COZEVACONNECT OVERLAY: Checking Cozeva

*Upon opening a patient chart in your EHR, CozevaConnect Overlay scans through the patient demographic information displayed in the EHR to find the corresponding patient in Cozeva.*



The screenshot shows an EHR patient chart for Tarra Haggerty. The patient's demographic information is listed on the left, and clinical data is on the right. A CozevaConnect overlay is positioned on the right side of the chart, displaying two icons: a person icon (labeled 1) and a bell icon (labeled 2). The person icon shows a count of 16, and the bell icon shows a count of 4. A legend on the right side of the overlay explains the icons: 1. A person icon, 2. A bell icon.

**Reason for Visit**  
Annual Wellness Exam

**Vital Signs**  
Wt 180 lbs  
Ht 5ft 11.5 in  
BMI 24.75  
BP 134/74  
Pulse 62  
Temp 97 F

**Chief Complaint**  
Mr. Powell is a 53 year old male present for his scheduled annual physical exam. The patient reported having no chest pain, shortness of breath, nausea. Has DM type 2, HTN, high triglycerides.

**History of Present Illness**  
Depression Screening:  
PHQ-9  
Little interest or pleasure in doing things Not at all  
Feeling down, depressed, or hopeless Not at all

**Tarra Haggerty**  
Female, 02/03/1967 (56 y.o.)  
MRN: 2687052  
Phone: (408)132-9821  
Address: 160 Apple St.  
Irvine, CA  
Insurance: Blue Shield  
PCP: John Smith  
Pharmacy: None  
Preferred Lab: None  
Allergies: No Known Allergies

30 min outpatient | March 2, 2023 09:30AM

1. A person icon.  
2. A bell icon.

# COZEVACONNECT OVERLAY: Checking Cozeva



*No Patient Match: A green person icon with a green '0' appears to denote that the corresponding patient is not found in Cozeva.*

The screenshot displays a patient record for Tarra Haggerty. On the right side, a circular overlay highlights a notification icon with a green person icon and a green '0', indicating no patient match. Below this, another notification icon with a blue bell and the number '3' is visible. The patient record includes the following information:

**Reason for Visit:** Annual Wellness Exam

**Vital Signs:** Wt 180 lbs, Ht 5ft 11.5 in, BMI 24.75, BP 134/74, Pulse 62, Temp 97 F

**Chief Complaint:** Mr. Powell is a 53 year old male present for his scheduled annual physical exam. The patient reported having no chest pain, shortness of breath, nausea. Has D. type 2, HTN, high triglycerides.

**History of Present Illness:** Depression Screening: PHQ-9 Little interest or pleasure in doing things Not at all, Feeling down, depressed, or hopeless Not at all

**Patient Information:** Tarra Haggerty, Female, 02/03/1967 (56 y.o.), MRN: 2607052, Phone: (408)132-9821, Address: 160 Apple St, Irvine, CA, Insurance: Blue Shield, PCP: John Smith, Pharmacy: None, Preferred Lab: None, Allergies: No Known Allergies

# COZEVACONNECT OVERLAY: Checking Cozeva



*Single Patient Match: The person icon will display the number of care gaps next to the person icon in red with a red dot (●).*

The screenshot shows a patient record for Tarra Haggerty. On the left is a patient icon with a red '16' and a red dot next to it. A red callout box points to this icon with the text 'Shows number of caregaps of this patient'. Below the icon is the patient's name and demographic information. The main content area shows medical history, including 'Reason for Visit', 'Vital Signs', 'Chief Complaint', and 'History of Present illness'. A second callout box points to a '16' indicator in the 'History of Present illness' section.

1

Click the person icon to open Cozeva and view quality care gaps

# COZEVACONNECT OVERLAY: Checking Cozeva



*This is the view when you first open Cozeva from the person icon. To view quality care gaps, navigate to the Patient Dashboard.*

2

2 { Click the drop-down arrow and choose Dashboard

The screenshot displays the Cozeva Patient Dashboard. On the left, a navigation menu is open with 'Dashboard' selected. The main content area shows a list of medical conditions with details such as ICD-9 codes and dates. The conditions listed are:

- Suspect V28: Secondary malignant neoplasm of unspecified site (C79.9) on 05/23/2022.
- Recapture V28: Secondary and unspecified malignant neoplasm of axilla and upper limb lymph nodes (C77.3) on 07/17/2024.
- Recapture V28: Malignant neoplasm of unspecified site of unspecified female breast (C50.919) on 12/15/2025.
- Diabetes Hierarchy: Type 2 diabetes mellitus with diabetic cataract (E11.36) on 08/13/2025.

At the bottom, there are fields for 'Date of Service' and 'Rendering Provider' with a search bar and buttons for 'Delete', 'Save Draft', and 'Submit'. On the right, an 'Attachments' panel is visible, showing options to upload documents and a disclaimer about supported file formats.

# COZEVA: Non-Compliant Measures

The screenshot displays a patient dashboard interface. At the top, there is a search bar and navigation icons. Below the search bar, patient information is visible, including insurance types (Commercial, BSHMO, BLUE SHIELD HMO), a date range (EPIC 03/01/2022 - Present), and other details like 'No past visit' and 'Preferred Pharmacy: None'. On the right side, there are icons for 'Care Ops' and 'RAF' with a count of '4 (0 HCCs)'. The main content area is divided into two sections: 'Quality Measures' and 'Events'. Under 'Quality Measures', two items are listed: 'Breast Cancer Screening' (BCS - Preventive Health Screening) and 'Cervical Cancer Screening' (CCS - Preventive Health Screening). The 'Events' section shows a 'Timeline' view for the year 2022, with a specific event on 'JULY 27' titled 'Home sleep test (hst) with type iv portable monitor, unattended; minimum of 3 channels' and 'Sleep studv. unattended. simultaneous recording of. heart rate. oxvaen ...'.

*This is a view of the patient's dashboard which shows the patient's compliance status for each quality measure.*

# COZEVA: Non-Compliant Measures

The screenshot displays the COZEVA patient dashboard. At the top, there is a search bar and navigation icons. Below the search bar, patient information is shown, including insurance (Commercial, BSHMO, BLUE SHIELD HMO), a plus sign icon, and visit history (No past visit, Visited 07/27/2022). A 'Care Ops' section shows '4 (0 HCCs)'. The main area is divided into 'Quality Measures' and 'Events'. Under 'Quality Measures', two items are listed: 'Breast Cancer Screening' (BCS - Preventive Health Screening) and 'Cervical Cancer Screening' (CCS - Preventive Health Screening). A 'Timeline' window is open on the right, showing a '2022 Events' entry for 'JULY 27' with details: 'Home sleep test (hst) with type iv portable monitor, unattended; minimum of 3 channels' and 'Sleep studv. unattended. simultaneous recording of. heart rate. oxvaen ...'.




3

3 { Take action on Care Gaps

# Cozeva TIPS

# COZEVA: Measure Compliance

- A { Quality Measures will be shown under the "Quality Measures" section / column
- B { Compliant measures will not have a red dot
- C { Non-Compliant measures will have a red dot next to the measure
- D { Pertinent Quality events will be shown under the "Events" section / column
- E { Compliance events and dates will be shown.
- F { Eligibility events and dates will be shown.
- G { Claim detail and lab results will be shown in the last column




All		Hoag Clinic	2022	
A	Quality Measures		D	Events
B	 <b>Breast Cancer Screening</b>	BCS · Preventive Health Screening	E <b>Compliance</b> 12/07/2020	77063 Screening digital breast tomosynt... VON DEM BUSSCHE, NICOLAS, MD +6 more
D	 <b>Cervical Cancer Screening</b>	CCS · Preventive Health Screening	<b>Compliance</b> 11/30/2020	87624 Infectious agent detection by nucl... QUEST DIAGNOSTICS +7 more
E	 <b>HbA1c Poor Control</b>	HBD2 · Diabetes Care	F <b>Eligibility</b> 01/04/2021	E11.9 Type 2 diabetes mellitus without c... SWEETSER, LAUREN, MD
			<b>Compliance</b> 04/08/2021	4548-4 Hgb A1c MFr Bld SWEETSER, LAUREN, MD G <b>Result: 7.7</b> +6 more

# COZEVA: Measure Compliance

*NOTE: The presence of “compliance” data under the events column does not necessarily mean the patient is compliant. The compliance data may be historical, and the patient may still require new tests or procedures. The results may also not be compliant results. In example below the patient has a1c results under the events data but the results are not compliant.*

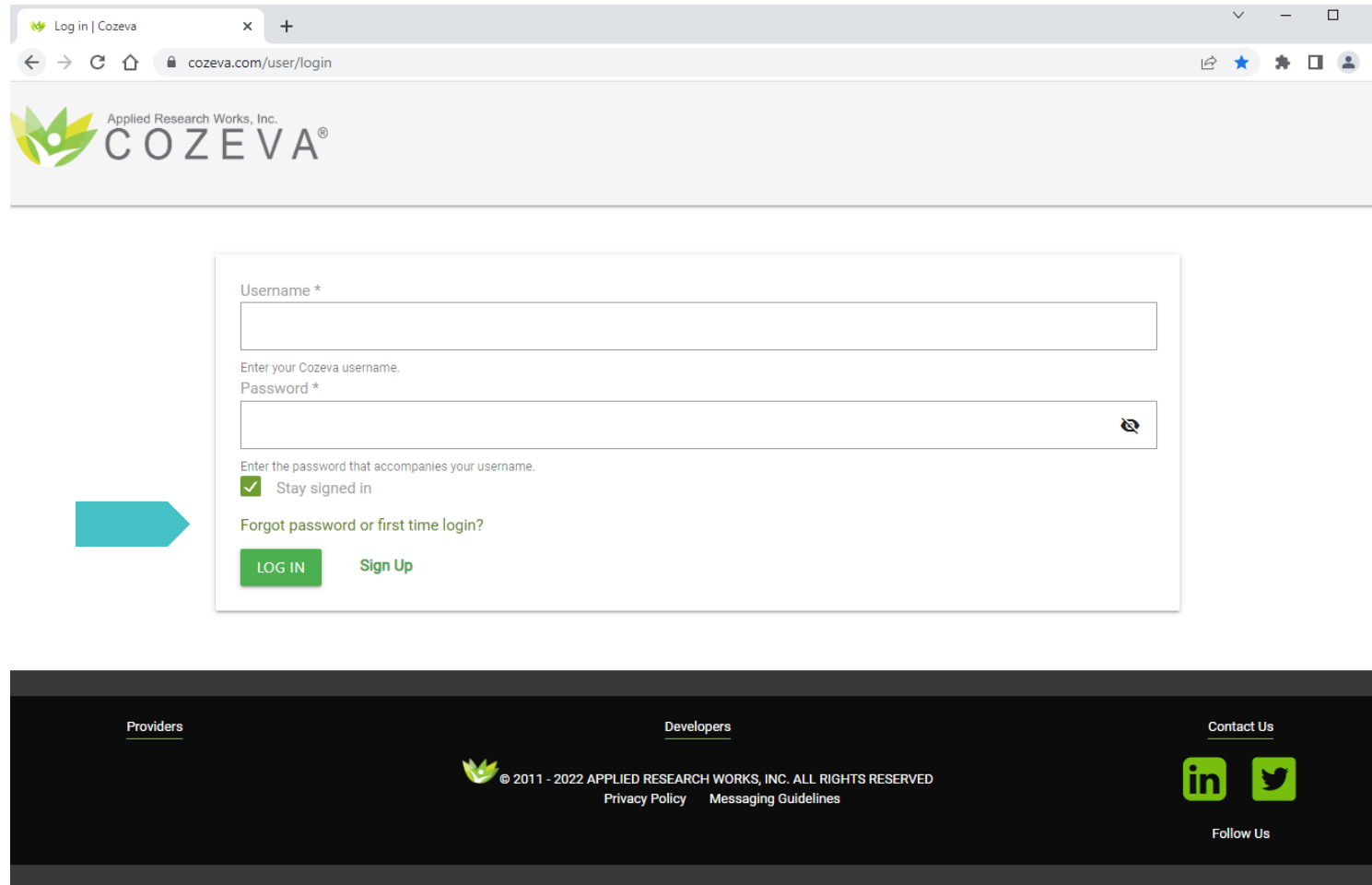
*Always look to see if the patient has the red dot next to the measure as that will mean they are not compliant, and the patient requires additional actions to close the care gaps.*

All ▾ Hoag Clinic ▾ 2022 ▾

Quality Measures	Events
 Breast Cancer Screening Preventive Health Screening	Compliance 12/07/2020 77063 Screening digital breast tomosynt... VON DEM BUSSCHE, NICOLAS, MD +6 more
 Cervical Cancer Screening CCS · Preventive Health Screening	Compliance 11/30/2020 87624 Infectious agent detection by nucl... QUEST DIAGNOSTICS +7 more
 HbA1c Poor Control HBD2 · Diabetes Care	Eligibility 01/04/2021 E11.9 Type 2 diabetes mellitus without c... SWEETSER, LAUREN, MD  Compliance 04/08/2021 4548-4 Hgb A1c MFr Bld SWEETSER, LAUREN, MD <b>Result: 7.7</b> +6 more

# COZEVA: Forgot Password

*NOTE: If you have forgotten your password, click on “Forgot password or first time login?”*



The screenshot shows a web browser window with the URL `cozeva.com/user/login`. The page header includes the Cozeva logo and the text "Applied Research Works, Inc. COZEVA®". The main content area contains a login form with the following elements:

- A "Username \*" input field with the instruction "Enter your Cozeva username."
- A "Password \*" input field with the instruction "Enter the password that accompanies your username." and a toggle icon.
- A checked checkbox for "Stay signed in".
- A link for "Forgot password or first time login?".
- Buttons for "LOG IN" and "Sign Up".

The footer contains links for "Providers", "Developers", and "Contact Us", along with social media icons for LinkedIn and Twitter, and the text "Follow Us". Copyright information for Applied Research Works, Inc. is also present.

Forgot  
Password Link





# Appendix 1: Record Sharing

# Record Retrieval

Multiple ways to share records with us to improve your practice's performance



## EMR Access

To set up EMR access for our team, please contact:  
[HoagClinicQI@hoag.org](mailto:HoagClinicQI@hoag.org)



## EpicCare Link

For instructions to upload records via EpicCare link, please contact Crystal Cao:  
[Crystal.Cao@hoag.org](mailto:Crystal.Cao@hoag.org)

Contact [HoagClinicQI@hoag.org](mailto:HoagClinicQI@hoag.org) for more record sharing options



# Appendix 2: Cozeva Overlay Installation



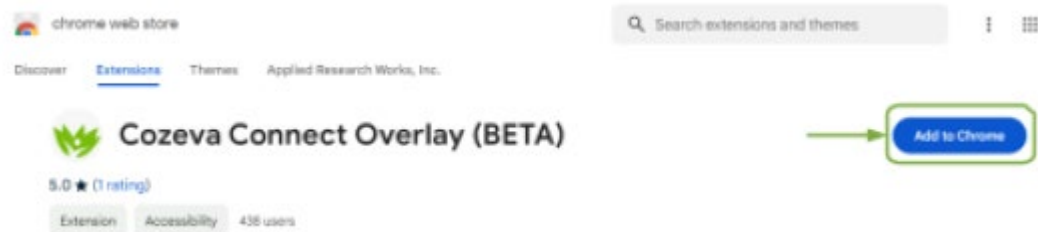
# COZEVACONNECT OVERLAY: Installation

1

Install CozevaConnect Overlay onto Chrome browser by clicking on Add to Chrome button. A popup will appear and you will be prompted to click add extension.

1

Click add to chrome button and add extension from popup



*If you have questions about CozevaConnect Overlay installation or troubleshooting, please reach out to HoagClinicQI@hoag.org*

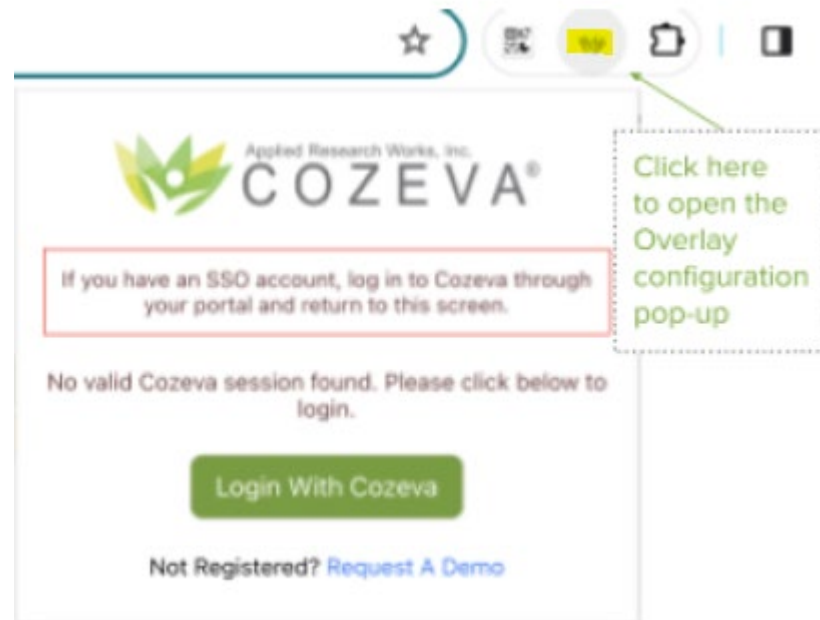
# COZEVACONNECT OVERLAY: Installation

2

The CozevaConnect Overlay extension appears as a lotus flower icon in the top right corner of Chrome.

2

Click on Login with Cozeva button and enter username and password



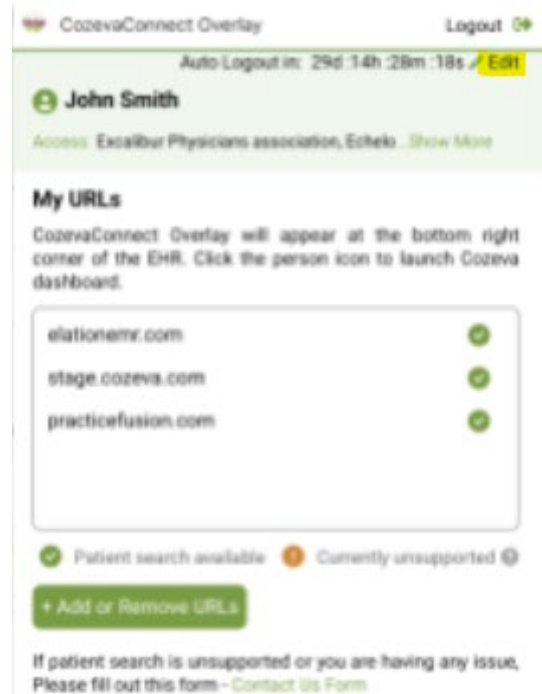
# COZEVACONNECT OVERLAY: Installation

3

Once you have successfully logged in, the following screen will appear. From this screen you can update your auto logout time.

3

Click edit in top right corner



3

Update to 30 days and click update button



# COZEVACONNECT OVERLAY: Installation



4

In the My URLs section, you can configure your EHR information.

4

Click the Add button and add URL excluding the https://

The screenshot shows the 'CozevaConnect Overlay' interface for user John Smith. The 'My URLs' section lists three URLs: elationemr.com, stage.cozeva.com, and practicefusion.com, each with a green checkmark icon. Below the list are status indicators: 'Patient search available' (green checkmark) and 'Currently unsupported' (orange warning icon). A yellow 'Add or Remove URLs' button is highlighted. Below this is a dialog box titled 'Add or Remove URLs' with a text input field containing 'ehr\_name.com' and a 'Save Changes' button.

4

After updating URL, the check icon will appear if the EHR has been configured

## My URLs

CozevaConnect Overlay will appear at the bottom right corner of the EHR. Click the person icon to launch Cozeva dashboard.

This screenshot shows the 'My URLs' section after configuration. The list now includes 'supported\_ehr.com' with a green checkmark icon and 'unsuported\_ehr.com' with an orange warning icon. The status indicators at the bottom remain the same as in the previous screenshot.

4

Enter and click save changes button



**Questions:**

**HoagClinicQI@hoag.org**