

MUCH MORE
THAN I.T.

OPPORTUNITY

Health Management Plan: A Better
Way to Care for Patients

March 13, 2015



Solving for Today. Preparing for Tomorrow.



Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!


A screenshot of the Cisco WebEx Event Center interface. The main window displays a webcast titled "OPPORTUNITY" with the Galen Healthcare Solutions logo and the text "MUCH MORE THAN I.T." and "Welcome to Today's Webcast". The text "The webcast will begin shortly..." is also visible. On the right side, there is a sidebar with a "Participants" panel and a "Q&A" panel. The "Q&A" panel is highlighted with a red box, showing a dropdown menu with "All (0)" and a "Send" button. The "Q&A" icon in the top right corner is also highlighted with a red box. The interface includes a menu bar at the top with "File", "Edit", "View", "Communicate", "Participant", "Event", and "Help". The bottom status bar shows "Connected" with a green dot.

INTRODUCTIONS

- Becky Matias
- Tracy Kimble



AGENDA & OBJECTIVES

- 
- A decorative image on the left side of the slide, showing a mountain landscape with a body of water and a cloudy sky, framed by a diagonal line.
- What's an HMP?
 - What's included in an HMP?
 - Components
 - Benefits of usage
 - Reminders & Orders
 - Differences
 - Types of Reminders
 - How to add
 - Tips and Tricks
 - HMP Enterprise Preferences
 - Meaningful Use 2 Considerations

HEALTH MANAGEMENT PLAN

- Workspace that includes patient's active problems associated to:
 - Active orders
 - Results
 - Medications
 - Reminders linked to the problem
- Providers have the ability to
 - View the “whole picture”
 - Take actions on problems and associated clinical items
- Accessible from the Clinical Desktop or the Note Authoring Workspace (NAW)

Daily Clinical Desktop Task List Documents eCalcs AntiCoag Module Wound Care Module
Allscripts, Allison T MRN: ZZTWO1 Sex: F FYI: FYI
 DOB: 03/05/1973 AKA: Ally Pri Ins: Allscripts, Provider
 Age: 42 Years PCP: Allscripts, Provider Allergies: Med & Non Med
 Select Patient ▼ i ⚠ ⚠

Adult Patient View

Commit Pat Loc Status

Encounter Problem **Health Mgmt** Vitals Flowsheets ChartViewer

Health Management Problem Refresh

No filter applied

Item	Sc	G	M...	D	5y	T	Incom...
Back pain							
Amoxicillin 500 MG Oral...			TA...			⚠	
LORazepam 1 MG Oral Tablet			TA...			E	

Meds Allergies Orders Immuns Patient Worklist

Current Medications Status Alpha

Active

- ⚠ Albuterol Sulfate 2 MG/5ML Oral Syrup; TAKE 1 TEASPOONFUL 4 TIMES DAILY AS NEEDED; Therapy: 11Nov2014 to (Evaluate:14Jan2015); Last Rx: 11Nov2014
- ⚠ Amoxicillin 500 MG Oral Capsule; TAKE 1 CAPSULE 4 TIMES DAILY AS NEEDED; Therapy: 11Nov2014 to (Evaluate:21Nov2014); Last Rx: 11Nov2014
- ⚠ Amoxicillin 500 MG Oral Tablet; TAKE 1 TABLET 3 TIMES DAILY AS NEEDED; Therapy: 11Nov2014 to (Evaluate:21Nov2014); Last Rx: 11Nov2014

Note Authoring

Allscripts, Allison T 42 YO F DOB: 05Mar1973 Other 3/12/2015

Note

Commit Pat Loc Status

Encounter

Note ChartViewer Health Mgmt Flowsheets Immuns Vitals/Growth Problem Meds Allergies Orders

Health Management Problem Refresh New Task

No filter applied

Item	Sche...	Se	Goal	Most Recent	Date	5y...	To Do	Incomplete
<input type="checkbox"/> Back pain		<input type="checkbox"/>						
Amoxicillin 500 MG Oral...		<input type="checkbox"/>		TAKE 1...			⚠ Eval:2...	
LORazepam 1 MG Oral...		<input type="checkbox"/>		TAKE 1...			Eval:14M...	
Cardiology Referral		<input type="checkbox"/>		Complete	05...			
Orthopedic Surgery...		<input type="checkbox"/>						05Mar2015
Physical Therapy Referral		<input type="checkbox"/>						05Mar2015
<input type="checkbox"/> Hand fracture		<input type="checkbox"/>						

HEALTH MANAGEMENT PLAN

Problem

Health Mgmt

Vitals

Flowsheets

ChartViewer

Encounter

Health Management

▼

Problem

▼

Refresh

New Task

▶

No filter applied

Item	Schedule	S	Goal	Most Recent	Date	5y Trend	To Do	Incomplete
Back pain		<input type="checkbox"/>						
Amoxicillin 500 MG Oral...		<input type="checkbox"/>		TAKE 1...			⚠ Eval...	
LORazepam 1 MG Oral Tablet		<input type="checkbox"/>		TAKE 1 TABLET...			Eval:1...	
Cardiology Referral		<input type="checkbox"/>		Complete	05Ma...			
Orthopedic Surgery Referral		<input type="checkbox"/>						05Mar2015
Physical Therapy Referral		<input type="checkbox"/>						05Mar2015
⊕ Hand fracture		<input type="checkbox"/>						
⊕ Lethargy		<input type="checkbox"/>						
⊕ Loss of balance		<input type="checkbox"/>						
⊕ ⚠ Migraine		<input type="checkbox"/>						
⊕ ⚠ Other Orders		<input type="checkbox"/>						
⊕ Pharyngitis, acute		<input type="checkbox"/>						
⊕ ⚠ Health Maintenance		<input type="checkbox"/>						
⊕ ⚠ Other Medications		<input type="checkbox"/>						

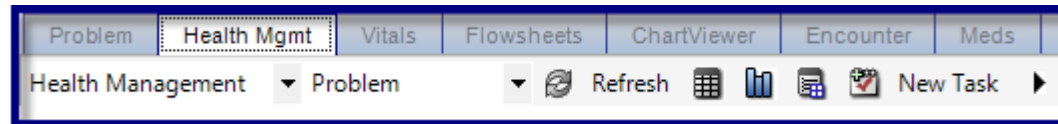
HMP COMPONENTS

Problem	Health Mgmt	Vitals	Flowsheets	ChartViewer	Encounter	Meds	Allergies	Orders	Immun	Patient Worklist
<div> <div> Health Management Health Management Reminders Immunizations series FlowSheets Medication Flowsheet Education VitalSigns/Findings Normative Growth </div> <div> Problem Refresh New Task </div> </div>										
Health Management										
	Schedule	Se	Goal	Most Recent	Date	5y Trend	To Do	Incomplete		
Oral Capsule				TAKE 1 CAPSULE...			⚠ Eval:...			
Oral Tablet				TAKE 1 TABLET 3...			Eval:14...			
				Complete	05Mar...					
Referral								05Mar2015		

HMP COMPONENT VIEWS

- **Health Management**
 - Displays the contents of the patient's selected HMP plan in the data section of the component.
- **Reminders/Alerts**
 - Displays any reminders or alerts associated with the selected patient in the data section of the component.
- **Immunization Series**
 - Displays any immunizations received for the selected patient.
- **Flowsheets**
 - Displays selected Flowsheet using data from the patient's record.
- **Medication Flowsheets**
 - Displays the patient's centralized medication history in a flowsheet format.
- **Education**
 - Displays a table of all education delivered to the patient.
- **Vital Signs/Findings**
 - Displays a Flowsheet of the selected patient's vitals data.
- **Normative Growth**
 - Displays the Normative Growth Chart with the selected patient's data superimposed on the standard data based on the patient's age and sex.

HEALTH MANAGEMENT PLAN ICONS



- **Refresh**
 - Click to refresh the data within the component.
- **Flowsheet**
 - Click to display a flowsheet view with data from the items selected on the previous view. When problems are selected here, they are included in the ad hoc flowsheet along with any selected clinical items associated with the problem. They are displayed in tree format to allow user to expand and collapse.
- **Graph**
 - Click to generate a graph with data from the items selected on the previous view. If you have not selected items with enough data to graph, the application displays the message, “There needs to be at least one item with more than one value to plot a graph.”
- **Expand**
 - Click to expand or contract the data within the component. Each Grouped By heading is preceded by a plus (+) or minus (-) sign.
- **New Task**
 - Click to display Task Details, enabling creation of a new task. The application autopopulates Task Details with the selected patient’s name in Concerning Patient. It also sets the Assign To value to User, and sets User to the current user.

HMP COLUMNS

- **Item Name**
 - Item actively associated to the patient's problem
- **Schedule**
 - Displays an abbreviation for scheduled orders or for reminders if they are recurring
- **Select**
 - Select the check box for an item, graph the selected items with the Graph icon, or flow only those items by clicking the Flowsheet icon
- **Most Recent**
 - Displays most recent result for an orderable item or the SIG for a medication.
- **Date**
 - Displays the date order was executed for non-medication orders
- **5 Yr Trend**
 - Displays a “spark graph” if an orderable item and has occurred multiple times
- **To Do**
 - Date when the next instance of the order is due
- **Incomplete**
 - An incomplete item
 - If the to do date is in the past, the date on which the order was due is displayed
 - There is a red alert icon if the date is past due
 - Can be incomplete if results aren't back yet
 - When the items come back, its automatically completed and removed from the list

HMP REMINDERS

What are Reminders in HMP?


- Created *from* orderable items but are not yet orders in the patient chart
- Similar to a post-it note as reminder to order that specific lab or test or other orderable item
 - Differences between Reminders & Orders
 - 3 types of reminders

ORDERS & REMINDERS COMPARISON

Details	Orders	Reminders
Show in the Incomplete Column	X	
Show in the To Do Column		X
Drop off chart once executed		X
Recurring*	X	X
Results	X	
“Performed or Administered” Actions	x	

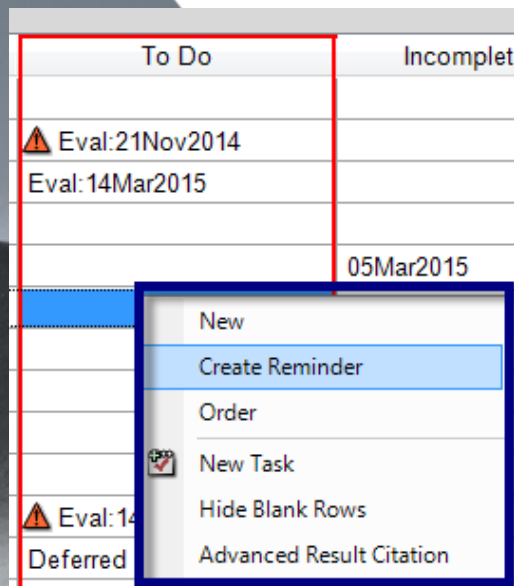
*Recurring Reminder- completed reminder drops off and auto advances to the next “To Do” date

HMP – 3 TYPES OF REMINDERS

- 
- A decorative image on the left side of the slide showing a mountain landscape with a body of water and a cloudy sky, partially obscured by a diagonal grey overlay.
- **Order Reminders:**
 - Created from all orderable items except for administration types (Meds or immunizations)
 - Most common, many users refer to any reminder as an “order reminder”
 - **Medication/Immunization Administration:**
 - Created from medications and immunizations that require administration by the clinician.
 - Ex...B12 injection requiring a nurse visit to be scheduled.
 - **Free Text Reminders:** **New in v11**
 - Provide the ability to create a reminder for anything that does not need to be linked to an orderable item or medication or immunization.
 - Ex...Speak to the patient about a clinical trial, a disease management program, or a drug recall

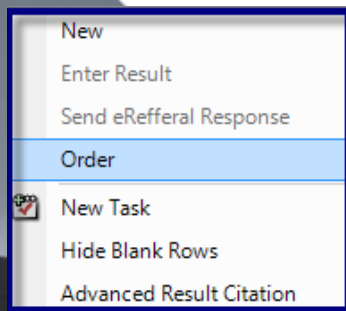
CREATING A REMINDER

- Click on To Do Column
- Right Click on line item
- Reminder Details opens
- Complete details



CREATING AN ORDER

- Right Click on Line Item
- Select **Order**
- Order Details Opens
- Complete Details
- Save and Close ACI



The 'Order Details' window displays the following information:

- Header:** Allscripts, Allison T 42 YO F DOB: 05Mar1973 Other 3/12/2015
- Title:** Physical Therapy Referral
- For:** [1] back pain
- Status:** Active (Details button)
- To Be Done:** 12Mar2015 (Calendar icon, Refresh icon)
- Overdue:** 26Mar2015 11:05PM
- Recipient:** (Dropdown menu, User icon)
- ☐ First Available Provider
- ☐ Specialist Response Received
- ☐ Record w/o Ordering
- Tabs:** Order (selected), Details, Attachments, Questions, Add'l Details, Charging, Encounters, History, Annotations
- Details Section:**
 - Reason:** (Text area, 1000 chars remaining, Insert Problem button, TT button, Clear button)
 - Perform:** Not Applicable (Record dropdown, Routine dropdown, Print Copy button)
 - Ordered By:** Allscripts, Cardiologist (User icon)
 - Supervised By:** Allscripts, Cardiologist (User icon)
 - Authorization:** Prospective

ORDER REMINDER FROM HMP

- HMP Completed Results
- Highlight the “To Do” column cell
- Select **Create Reminder**
- Complete Reminder Details for the associated order and result

Problem

Health Mgmt

Vitals

Flowsheets

ChartViewer

Encounter

Meds

Allergies

Orders

Immun

Patient Worklist

Health Management

▼ Problem

▼ Refresh

New Task

▶

No filter applied

Item	Schedule	Select	Goal	Most Recent	Date	5y Trend	To Do	Inc
Blood Glucose		<input type="checkbox"/>	New	200 mg/dl	04Mar2015			08M
Cardiology Referral		<input type="checkbox"/>		Complete	05Mar2015			
⊕ CBC With Partial Differential		<input type="checkbox"/>		Complete	01Jan2015			
CT Pelvis without Contrast		<input type="checkbox"/>						
Diabetic Foot Exam, Sensory		<input type="checkbox"/>	New	20Dec2013	20Dec2013			
Glucose, Serum		<input type="checkbox"/>						
MRI Head Without Contrast		<input type="checkbox"/>						
MRI Lumbar Spine		<input type="checkbox"/>						

New

Create Reminder

Order

New Task

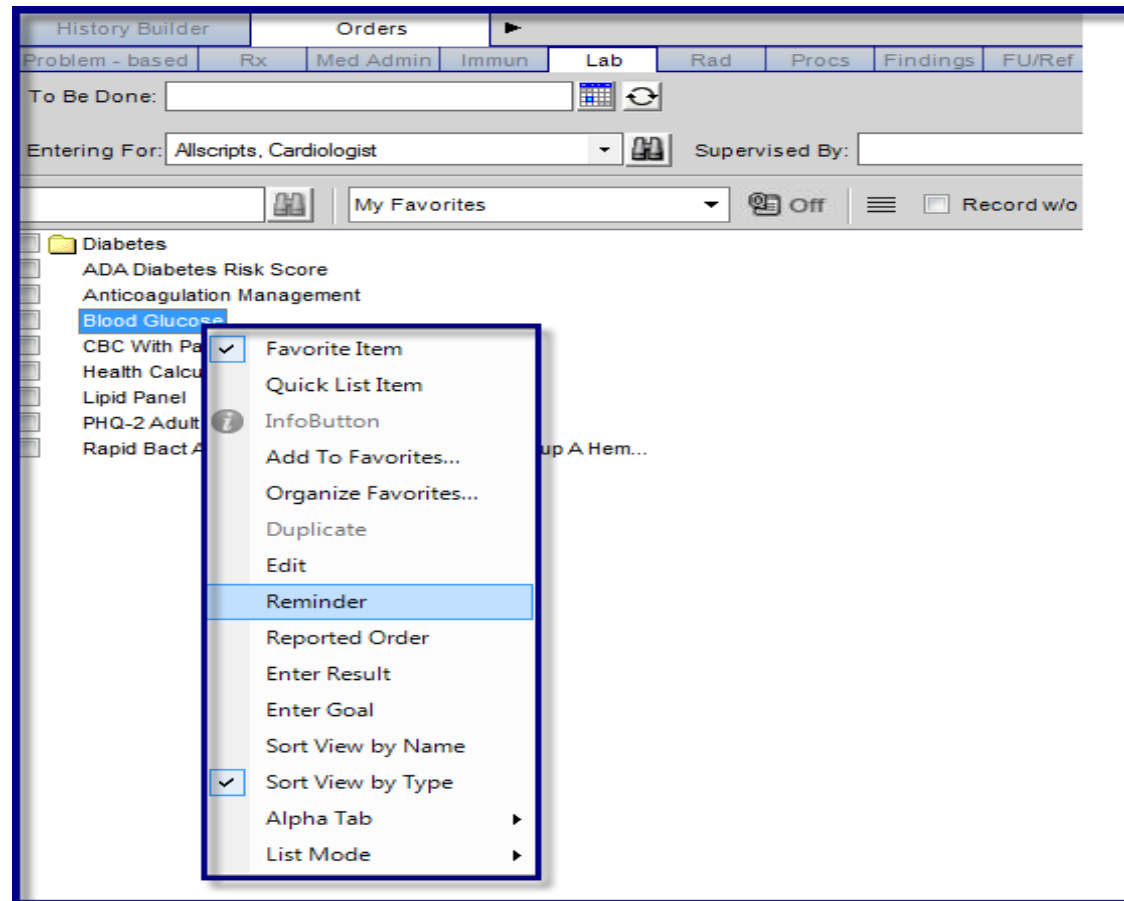
Hide Blank Rows

Advanced Result Citation

- New
- Create Reminder
- Order
- New Task
- Hide Blank Rows
- Advanced Result Citation

ORDER REMINDER FROM ACI

- Added from the ACI
- Locate the orderable item
- Right-click
- Select 'Reminder' from the context menu
- Enter reminder details in the HMP Details box



REMINDER FROM THE ACI

- If previous result **does not** exist in HMP view:
 - Leave the **Start Date** as it is
- If a previous result exists in HMP view:
 - Shows in the “Most Recent” column in HMP,
 - The “To Do” date for the reminder calculates from the most recent result date + the schedule

Health Management Reminder Details

Test, John 60 YO M DOB: 13Oct1954

Urinalysis By Dip Stick With Microscopy


⌵ HMP Reminder Details Status: Active

The **TODO Date** will automatically be calculated from the **Most Recent Date** any time a more recent date exists in the patient chart. When there is no previous occurrence, then the **TODO Date** will be equal to the **Start Date**

☒ Recurrence




☐ Daily Every months
☐ Weekly
☒ Monthly
☐ Yearly

Start Date

Start 

When no previous instance exists in the patient's chart

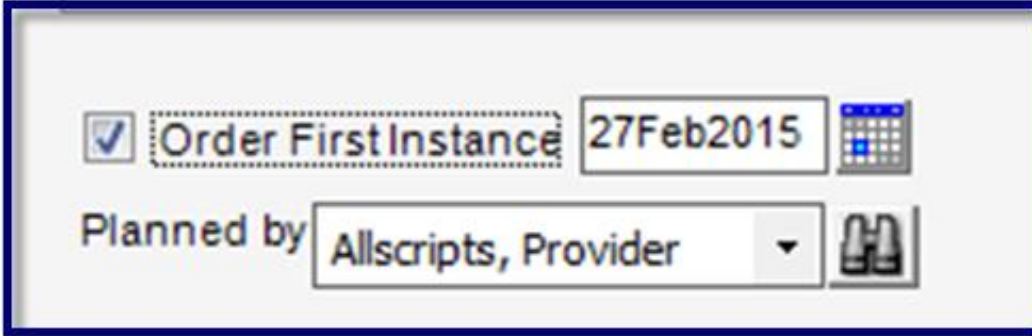
End Date

☒ No End Date
☐ End After:   occurrences
☐ End By: 


☐ Add Based


REMINDERS FROM THE ACI

- Utilize **Order First Instance** for items not already in the chart
 - Order Details dialog launches
 - Order details are entered
 - Reminder advances to the next “To Do” date based on the schedule



A screenshot of a software dialog box titled "Order First Instance". The dialog box has a light gray background and a dark blue border. It contains a checked checkbox labeled "Order First Instance", a text field with the date "27Feb2015", a calendar icon, a "Planned by" label, a dropdown menu showing "Allscripts, Provider", and a binoculars icon.

☒ Order First Instance 27Feb2015 

Planned by Allscripts, Provider 

MEDICATION / IMMUNIZATION REMINDER

- From To Do Cell
- Right Click Order
- Select Schedule
- Complete details
- Save and Close ACI

The screenshot illustrates the workflow for setting a medication reminder. It shows a table with columns for 'Most Recent', 'Date', '5y Trend', 'To Do', and 'Incomplete'. The 'To Do' column contains a list of medications and their due dates. A right-click context menu is open over the 'To Do' column, with the 'Schedule' option highlighted. A 'Schedule Dialog' window is also open, showing options for recurrence pattern and range of recurrence.

Most Recent	Date	5y Trend	To Do	Incomplete
TAKE 1 TABLET 3...			⚠ Eval:13Nov2...	
TAKE 1 TABLET ONCE...			Exp:05	
			Exp:04	
200 mg/dl	04Mar...			
Complete	05Mar...			
Complete	01Jan2...		⚠ Due	
Complete	02Mar...		Due: 0	
06Dec2014	06Dec...			

Immunization Details
Allscripts, Allison T 42 YO F DOB: 05Mar1973
Other 3/12/2015
Record Administration
Record w/o Ordering

Hepatitis A
Sig: Status... Active:
Wt: 68.04 Kg 05 Jan 2015
SIG: Personal New Structure

To Be Done: 12Mar2015
Schedule None

Schedule Dialog
Allscripts, Allison T 42 YO F DOB: 05Mar1973
Dates Recurring As Needed Age-Based
Recurrence Pattern
Daily Weekly Monthly Yearly
Every days
Every Weekday
Range Of Recurrence
Start: 12Mar2015
No End Date
End After: 1 occurrences
End By:

SLIDE 5 OF 15



- Don't enter a **Start Date** in the future for previously completed tests not ordered by your provider.
- Best practice is to enter the historical instance as a '**Record without Ordering**' to have it documented in the patient's chart.
- The reminder will calculate from that date instead of entering a future date in the **Start Date**.
- Reminders can be added to patient charts in bulk from **Population Health Management**
- When reminders are added from Population Health, the Start Dates – or the “To Do” dates vary depending on the presence of, or date of the “Most Recent” result shown in HMP

HMP PREFERENCES

- Access via TWAdmin → Preferences → HMP
- Control what items displayed & how those items are sorted

HMP Preferences
[\[edit\]](#)

Health Maintenance Problems - Default to Expanded

Indicates whether or not the Health Maintenance Problems default to an expanded state when the HMP page is opened.

Available Values	Recommended/Default Value	Available Levels	User Can Override
<ul style="list-style-type: none"> Alert Never Always 	Show in My Alerts	Enterprise	Yes

HMP Vitals Units

Indicates the default system that is used to calculate Vitals values.

- Note: If 'As Entered' is selected, then the value is displayed exactly how the value was entered.

Available Values	Recommended/Default Value	Available Levels	User Can Override
<ul style="list-style-type: none"> US Metric As Entered 	US Metric system	<ul style="list-style-type: none"> Enterprise Org 	Yes

http://wiki.galenhealthcare.com/index.php/Preference_List_and_descriptions

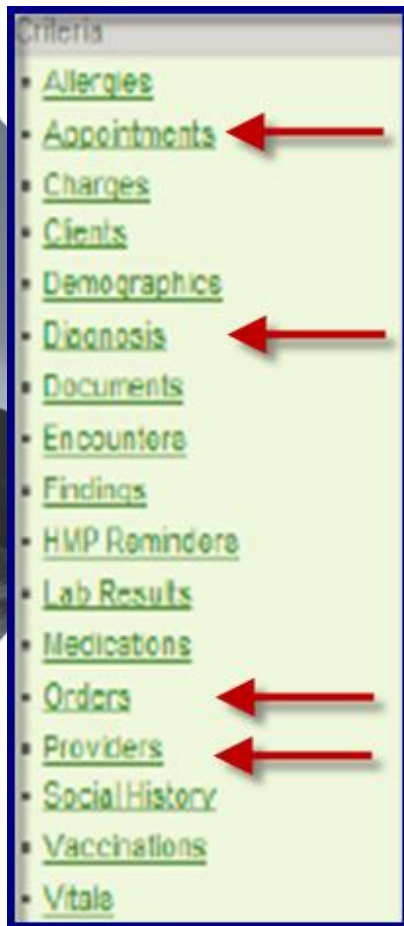
https://www3.allscripts.com/clientsupport/productdocumentation/docviewer.aspx?Source=Client_Connect

POPULATION HEALTH AND HMP

- **Core 11 – Generate Patient Lists**
 - By specific conditions
 - Use for quality improvement,
 - Reduction of disparities
 - Research or outreach
- **Core 12 – Patient Reminders**
 - Must be clinically relevant reminders
 - Can be added to the HMP and/or delivered to patient per their preference



HMP EXAMPLE SCENARIO



- **Provider wants to add HMP reminders on to appropriate patient charts for the following:**
 - Diabetic diagnosis
 - Arrived appointment within the last year
 - No A1C result in the last year
- **Actions**
 - Place a reminder on the HMP
 - Generate a reminder to be communicated to the patient per their preference



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