Patient Query and Meaningful Use
(Formerly Population Health Management)

Empowering Extraordinary Patient Care
Agenda

- Patient Query/PHM Overview
- Meaningful Use
- Patient Query in TouchWorks EHR
- Patient Query Demonstration
- Tips / Additional Information
- Known Issues

- Q&A
What is Patient Query?

• Formerly Population Health Management (PHM)
• Introduced in 11.2
• Gives ability to query your patient population
• “Pursuit Lists” are generated based on queries
  ✓ These lists can be filtered to include patients in a specific population group
• Patient Action Sets allow queried results to be acted upon to improve patient health outcomes within a population
PHM and MU Stage 1

- **Meaningful Use was the primary driver to develop PHM**
- **MU1 measures that can be met with PHM**
  - Menu #3 – Generate a List of Patients
    - Is a Y/N attestation
  - Menu #4 – Send Patient Reminders
    - At least 20% of unique patients that are >65 years or <5 years of age
Verbiage Updates for MU Stage 2

- **MU Package**
  - Formerly known as “Stim Set”
  - 11.4.1 and up
  - Required for both MU1 and MU2 Reporting for 2014

- **Allscripts Analytics Platform (AAP) for MU2**
  - Formerly known as “Allscripts Reporting Portal” (ARP) and “User Management Portal” (UMP)

- **Patient Query**
  - Formerly “Population Health Management” (prior to v11.4.1)

- **Allscripts Transaction Hub**
  - Event Bus
Patient Query and MU Stage 2

- **MU2 measures that can be met with PHM:**
  - MU Core #11 – Generate Patient Lists
    - Generate lists of patients by specific conditions to use for quality improvement, reduction of disparities, research or outreach.
  - MU Core #12 – Send Patient Reminders
    - Use clinically relevant information to identify patient who should receive reminders for preventive/follow-up care and send these patients reminders, per patient preference.
Patient Query: MU2 Core 11

• **MU2 Core #11 – Generate Patient Lists**
  
  ✓ Generate lists of patients by specific conditions to use for quality improvement, reduction of disparities, research or outreach.
  
  ✓ Y/N attestation
  
  ✓ Generate *at least one report* listing patients of the EP with a specific condition
Patient Query: MU2 Core 12

• **MU2 Core #12 – Send Patient Reminders**
  ✓ Use clinically relevant information to identify patient who should receive reminders for preventive/follow-up care and send these patients reminders, per patient preference.
  ✓ 10% threshold
  ✓ Denominator: All unique patients with 2+ office visits with the EP within 24 months prior to the start of the reporting period
  ✓ Numerator: All unique patients in the denominator who have been sent a reminder based on their documented patient preference (Portal, Mail, Phone)
System Configuration Considerations:

- **Performed by an Allscripts technical resource**
  - Transaction Hub – Inbound TWEHR subscription configuration on the client’s server
  - Outbound mediator proxy service
  - Outbound Configuration on Web Server
  - AHS CSS Configuration on Print Server
  - ETL (Extract – Transfer – Load) copying of the client database, mapping, and installation in the data warehouse
  - SSO (Single-Sign-On) requires authentication of a UID and password for Inbound messaging and Outbound verification
Client Configuration Considerations:

**Patient Reminder Preferred Communication Method: Mail**

- ✓ Create Text Templates
  - ✓ Note Admin >> Manage Text Templates (v11)
  - ✓ TW Module: Pt Communication
- ✓ Configure Document Type Dictionary
  - ✓ Patient Communication Mail (PtCommMail)
- ✓ Configure Auto-Print Defaults
- ✓ Configure DocBatchPrint Document menu
- ✓ Configure Task Views in Task Admin
- ✓ Configure Task Name Dictionary
  - ✓ “Mail Patient Communication” task
- ✓ Configure Patient Preferred Communication
Client Configuration Considerations:

**Patient Reminder Preferred Communication Method: Phone**
- ✓ Create Text Templates
  - ✓ Note Admin >> Manage Text Templates (v11)
  - ✓ TW Module: Pt Communication
- ✓ Configure Task Views in Task Admin
- ✓ Configure Task Name Dictionary
  - ✓ “Call Patient Communication” task
- ✓ Configure Patient Preferred Communication
Client Configuration Considerations:

**Patient Reminder Preferred Communication Method: Portal**

- ✓ Create Text Templates
  - ✓ Note Admin >> Manage Text Templates (v11)
  - ✓ TW Module: Pt Communication
- ✓ Configure Document Type Dictionary
  - ✓ Patient Communication Portal (PtCommPort)
- ✓ Configure Patient Portal
- ✓ Configure Patient Portal Security Code
- ✓ Configure Task Views in Task Admin
- ✓ Configure Patient Preferred Communication
Patient Query in TouchWorks EHR

- **Multiple points of entry**
  - AAP (formerly UMP) through the MU Package
  - TWAdmin in TouchWorks EHR

- **Launches the Allscripts Clinical Rules Editor**
  - Query definition workspace
    - Any combination of sixteen categories
    - The most popular criteria are Appointments, Diagnoses, Results, and Medications

- **Access to Patient Action Sets (only in EEHR)**
  - Auto-generate tasks that drive follow up on patients
  - Can be assigned to queries as needed
  - Leveraged to satisfy Patient Reminders Core #12
Patient Query Demo
Patient Query Enhancements

- **Overall improved platform from MU package**
- **Enhanced “Query Manager” window**
  - Enables users to more easily Run, Edit, and Copy existing queries
  - Schedulable Queries
  - Improved Query History
- **Support for both ICD-9 and ICD-10 Patient Queries**
- **No limit on number of patients returned in ad hoc query**
  - Previous limit was 500 patients
- **Existing PHM queries will brought over during 11.4.1/MU2 install**
Tips

• Understand MU2 Requirements in relation to Action Sets
• For MU attestation, consider queries that will cover much of your patient population to meet 10% threshold (i.e. Influenza Reminder Letters)
• Copy, then Edit
• Queries are run on ETL database
• Build smart queries!
• Use Patient Action Sets conservatively
• Keep yourself educated!
Additional Information:

• Slides and Q&A will be posted here:
  ✓ http://wiki.galenhealthcare.com/Patient_Query
  ✓ More Patient Query info:
    ✓ http://wiki.galenhealthcare.com/Population_Health_Management

• Patient Communication Text Template Examples:
  • http://wiki.galenhealthcare.com/Population_Health_Patient_Communication_Text_Template_Examples

• Client Connect
Known Issues

- **(04568317)** - Reminders created from action sets are not linked to the correct diagnosis, most seem to default as linked to Health Maintenance.
- **(03812194)** - Vaccines which are present in OID are not available to select as part of a query or the available options for vaccines do not match what is present in the OID.
- **(05236865)** - Unable to cancel queries that are in an executing status.
- **(03725185)** - Active queries that participate in the nightly update process are failing to update the patient lists and action sets in TouchWorks.
Known Issues cont.....

- **(03658992)** - Patient List defaulting to user.
  - From the patient list type even though the enterprise is selected list navigates back to personal.
  - Expected: 'Enterprise' should be highlighted when the user tries to add the next entry, but instead "personal" gets highlighted although he had selected 'Enterprise' for the previous entry.
  - Actual: When the enterprise is selected list navigates back to personal.
Questions?
Thank you for joining us today, for additional assistance....

You can contact us through our website at www.galenhealthcare.com