Health Management Plan: A Better Way to Care for Patients

March 13, 2015
Your phone has been automatically muted. Please use the Q&A panel to ask questions during the presentation!
INTRODUCTIONS

- Becky Matias
- Tracy Kimble
AGENDA & OBJECTIVES

- 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)
HMP ACCESS

- CLINICAL DESKTOP
- NOTE AUTHORING WORKSPACE
# HEALTH MANAGEMENT PLAN

<table>
<thead>
<tr>
<th>Item</th>
<th>Schedule</th>
<th>S</th>
<th>Goal</th>
<th>Most Recent</th>
<th>Date</th>
<th>5y Trend</th>
<th>To Do</th>
<th>Incomplete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back pain</td>
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<td>TAKE 1...</td>
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<td>Eval...</td>
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<td>Amoxicillin 500 MG Oral...</td>
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<tr>
<td>LORazepam 1 MG Oral Tablet</td>
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<td>TAKE 1 TABLET</td>
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<td>Lethargy</td>
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<td>Loss of balance</td>
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<td>Pharyngitis, acute</td>
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## HMP COMPONENTS

<table>
<thead>
<tr>
<th>Problem</th>
<th>Health Mgmt</th>
<th>Vitals</th>
<th>Flowsheets</th>
<th>ChartViewer</th>
<th>Encounter</th>
<th>Meds</th>
<th>Allergies</th>
<th>Orders</th>
<th>Immuns</th>
<th>Patient Worklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Management</td>
<td>Schedule</td>
<td>Se</td>
<td>Goal</td>
<td>Most Recent</td>
<td>Date</td>
<td>5y Trend</td>
<td>To Do</td>
<td>Incomplete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oral Capsule</td>
<td></td>
<td></td>
<td>TAKE 1 CAPSULE...</td>
<td></td>
<td></td>
<td></td>
<td>Eval...</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oral Tablet</td>
<td></td>
<td></td>
<td>TAKE 1 TABLET 3...</td>
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<td></td>
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<td>Eval:14...</td>
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<tr>
<td>Referral</td>
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<td>05Mar...</td>
<td></td>
<td></td>
<td>05Mar2015</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Additional components include:
- Reminders
- Immunizations series
- FlowSheets
- Medication Flowsheet
- Education
- VitalSigns/Findings
- Normative Growth
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

<table>
<thead>
<tr>
<th>Details</th>
<th>Orders</th>
<th>Reminders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show in the Incomplete Column</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Show in the To Do Column</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Drop off chart once executed</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Recurring*</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Results</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>“Performed or Administered” Actions</td>
<td>x</td>
<td></td>
</tr>
</tbody>
</table>

*Recurring Reminder- completed reminder drops off and auto advances to the next “To Do” date*
HMP – 3 TYPES OF REMINDERS

- **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
ORDER REMINDER FROM HMP

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

- From To Do Cell
- Right Click Order
- Select Schedule

- Complete details
- Save and Close ACI
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

**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.

<table>
<thead>
<tr>
<th>Available Values</th>
<th>Recommended/Default Value</th>
<th>Available Levels</th>
<th>User Can Override</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert</td>
<td>Show in My Alerts</td>
<td>Enterprise</td>
<td>Yes</td>
</tr>
<tr>
<td>Never</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Always</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Available Values</th>
<th>Recommended/Default Value</th>
<th>Available Levels</th>
<th>User Can Override</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>US Metric system</td>
<td>Enterprise</td>
<td>Yes</td>
</tr>
<tr>
<td>Metric</td>
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<td>Org</td>
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</tr>
<tr>
<td>As Entered</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

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

https://clientconnect.allscripts.com/docs/DOC-15700
Thank you for joining us today.

For additional assistance contact us through our website at www.galenhealthcare.com
MUCH MORE THAN I.T.