

EHR 5.9 8.4 CPC (+) Requirements Upgrade Training May 2017

Presenter: Carol Wigley

Note: Please be advised this information is consistent with the 5.9 BETA application version. Additional changes may occur prior to the final application release.

Agenda

- **CPC+ Requirements**
 - What is CPC+
- **Risk Stratifying and Empaneling Patients**
- **Social, Behavioral and Psychological Data**
- **Provide resources and support to assess patients' psychosocial needs**



CPC+ Risk Stratifying and Empaneling Patients



What is CPC+

Comprehensive Primary Care Plus (CPC+)

- Centers for Medicare & Medicaid Services (CMS)
- Comprehensive Primary Care Plus (CPC+) is a national advanced primary care medical home model that aims to strengthen primary care through regionally-based multi-payer payment reform and care delivery transformation

What is CPC+

Comprehensive Primary Care Plus (CPC+)

- CPC+ includes two primary care practice tracks (2017 / 2018) with incrementally advanced care delivery requirements and payment options to meet the diverse needs of primary care practices in the United States (U.S.)

KBM Requirement Overview

Requirements

- The system shall support CPC+ Requirements
- The system shall support CPC+ Requirements for Risk Stratifying and Empaneling Patients*
- The system will provide a practice configuration setting to allow practices to show/hide the CPC(+) Risk Level button as not all practices will require this functionality

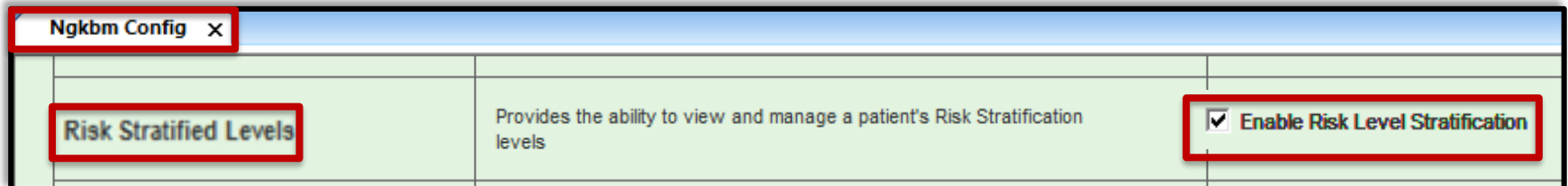
KBM Requirement Overview

The purpose is to meet the CPC+ requirement of identifying patients with complex needs via risk stratification level and associating patients to a practice care team

- Practices must have the ability to:
 - Assign a risk score to patients
 - Assign patients to a practice care team
 - Generate reports based on a patient's risk score and care team

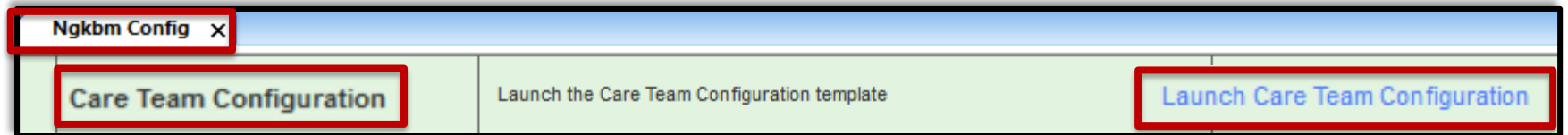
KBM Requirement Overview

- The system will provide a practice configuration setting to allow practices to show/hide the Risk Level button as not all practices will require this functionality



KBM Requirement Overview

- Identifying patients with complex needs via risk stratification level and associating patients to a practice care team



KBM Requirement Overview

- Assign patients to a practice care team
- Generate reports based on a patient's risk score and care team

The screenshot shows two overlapping windows from a software application. The top window is titled "Care Team Configuration" and contains the following fields:

- Practice Team Configuration:** A red-bordered box highlights this section. It includes a text input for "*Care team name:" with a "25 character limit" note above it. Below it is another text input for "*Primary provider:" with a dropdown arrow. To the right is a "Location (optional):" text input with a dropdown arrow and a "CI" icon.
- Below these fields are two columns: "Available members" and "Selected members", both currently empty.

The bottom window is titled "Practice Care Team and Risk Score Review:" and contains the following elements:

- Report Filters:** A section with a "Care team:" dropdown, an "Include risk levels:" section with checkboxes for 1, 2, 3, 4, 5, and 6, and a checked "All" option. To the right is a "Primary provider:" dropdown and an "Apply" button.
- A table with the following headers: "Care Team Name", "Patient Name", "CPC+ Risk Score", and "Primary Provider". The table body is currently empty.
- At the bottom right are "Generate Report" and "Save & Close" buttons.

At the very bottom of the image, there are two more buttons: "Generate Report" and "Save & Close".

Demo functionality of Risk Stratifying and Empaneling Patient

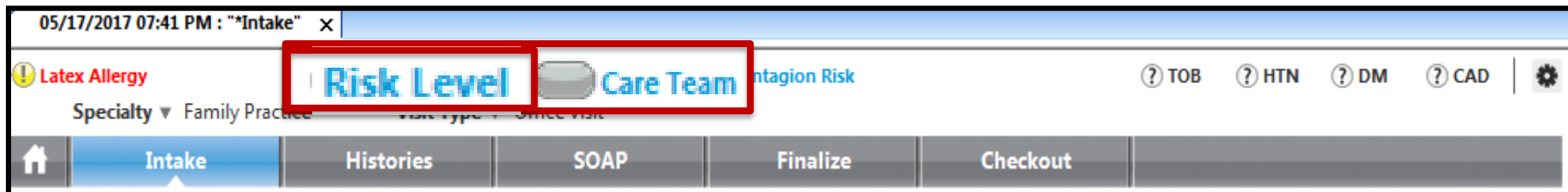


Assigning Risk Level to Patient

Risk Level

Patient with no Risk Level and no Care Team assigned

Use Risk Level active text link to launch Risk Stratified pop-up



Assigning Risk Level to Patient

Six Risk Levels based on AAFP

Level 1 PRIMARY PREVENTION	Level 2 PRIMARY PREVENTION	Level 3 SECONDARY PREVENTION	Level 4 SECONDARY PREVENTION	Level 5 TERTIARY PREVENTION	Level 6 CATASTROPHIC CARE
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- Select Risk Level
- Final Risk Level displays



Assigning Care Team to Patient

Care Team

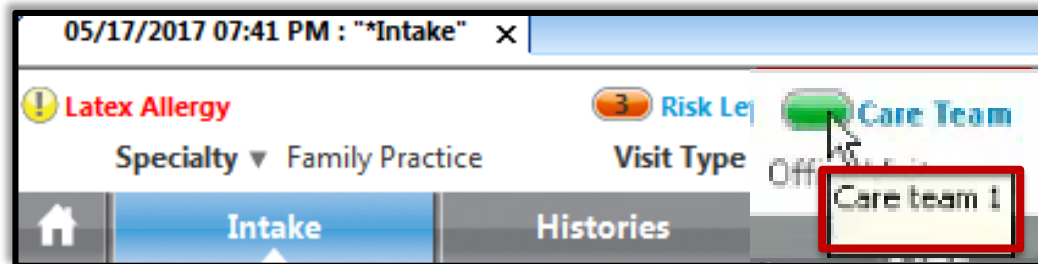
- Patient with Risk Level and no Care Team assigned
- Care Team active text link to launch Care Team pop-up
- Select Care Team



Assigning Care Team to Patient

Care Team

- Care Team(s) assigned
- Care Team button turns green
- Hover over button to see primary care team



Recap

- **CPC+ Requirements**
 - What is CPC+
- **Risk Stratifying and Empaneling Patients**
 - Activated Risk Level indicator
 - Assigned Risk Level
 - Assigned Care Team
 - Practice Care Team and Risk Score Review Report



Social, Behavioral and Psychological Data



KBM Requirement Overview

This new functionality will allow healthcare provider to have a prebuilt questionnaire template for documenting the social, behavioral and psychological data for the patient

- Link to the questionnaire from Social History panel in every specialty
- Pre-built form in the system for accessing the Codified Questions and Answers
- Capability to calculate scores and total scores and document interpretation (when applicable) for a questionnaire
- Displaying the score details in document

KBM Requirement Overview

Requirements

- The system shall support CPC+ Requirements
- The system shall support requirements for Social, Behavioral and Psychological Data
- System shall have a link text on all the Social History panels



KBM Requirement Overview

Requirements

- System shall have a Social Determinants of Health template
- System shall have an information icon on Social Determinants of Health template
- System shall support a section for Financial Resource Strain within Social Determinants of Health template



KBM Requirement Overview

Requirements

- System shall support a section for Education within Social Determinants of Health template
- System shall support a section for Stress within Social Determinants of Health template
- System shall support a section for PHQ-2 questionnaire within Social Determinants of Health template



KBM Requirement Overview

Requirements

- System shall support a section for Physical Activity within Social Determinants of Health template
- System shall support a section for AUDIT-C within Social Determinants of Health template
- System shall support the submission of Scores for AUDIT-C

KBM Requirement Overview

Requirements

- System shall have an AUDIT-C questionnaire form
- System shall support a section for Social Connection and Isolation within Social Determinants of Health template
- System shall support the submission of Scores for Social Connection and Isolation

KBM Requirement Overview

Requirements

- System shall support a section for Exposure to Violence within Social Determinants of Health template
- System shall support the submission of Scores for Exposure to Violence

KBM Requirement Overview

Sections added to the Social Determinants of Health template

- Financial Resource Strain
- Education
- Stress
- **Depression***
- Physical Activity
- **Alcohol Use***
- **Social Connection and Isolation***
- **Exposure to Violence***

***These sections have a different set of questions/answers that need to calculate a total score**

Social Determinants of Health template

Questions and answers need to be recorded based on the patient's responses

- These questions and answers are LOINC codified
- User will not be able to change any codified data
- Declines to specify option (no LOINC code submitted)

Question	Question LOINC Code	Answer	Answer LOINC Code	LOINC Answer List ID	Order	Code
How hard is it for you to pay for the very basics like food, housing, medical care, and heating?	76513-1	Very hard	LA15832-1	LL3266-5		1
		Hard	LA14745-6			2
		Somewhat hard	LA22683-9			3
		Not very hard	LA22682-1			4

Financial Resource Strain	<input type="checkbox"/> Declines to specify	<input type="radio"/> Very hard	<input type="radio"/> Hard	<input type="radio"/> Somewhat hard	<input type="radio"/> Not very hard
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How hard is it for you to pay for the very basics like food, housing, medical care, and heating?

Social Determinants of Health template

Sections where you have to calculate a total score:

- Depression
- Alcohol Use
- Social Connection and Isolation
- Exposure to Violence

Depression Declines to specify *(Responses below are shared with PHQ-2 questionnaire template.)*

(Q1) Little interest or pleasure in doing things? Not at all Several days More than half the days Nearly every day

(Q2) Feeling down, depressed, or hopeless? Not at all Several days More than half the days Nearly every day

[v Patient Health Questionnaire \(PHQ-9\)](#) **Patient Health Questionnaire 2 items (PHQ-2) total score:**

Social Determinants of Health template

Sections where you have to calculate a total score: Depression

- LOINC code 55757-9 submitted if any question answered
- When these questions are answered, they will pass individual question LOINC code
- Answer selected will pass the relative Answer LOINC code
- The LOINC code for total score 55758-7 will be submitted if any of the questions are answered

Question	Question LOINC Code	Answer LOINC Code	LOINC Answer List	LOINC Answer List ID	Score
Patient Health Questionnaire 2 item (PHQ-2) [Reported]	55757-9	N/A			
(Q1) Little interest or pleasure in doing things?	44250-9	LA6568-5	LL358-3		0
		LA6569-3			1
		LA6570-1		2	2
		LA6571-9		3	3
(Q2) Feeling down, depressed, or hopeless?	44255-8	LA6568-5		0	0
		LA6569-3		1	1
		LA6570-1		2	2
		LA6571-9		3	3
Patient Health Questionnaire 2 item (PHQ-2) total score	55758-7				
		associated applicable unit of measure			

Social Determinants of Health template

Access to the Social Determinants of Health template

The screenshot shows a medical software interface with the following elements:

- Browser tab: 05/16/2017 03:16 PM : "*Histories" x
- Top navigation: Specialty (Family Practice), Visit Type (Office Visit), Care Team, Contagion Risk, and icons for TOB, HTN, DM, CAD.
- Main navigation: Intake, Histories (highlighted), SOAP, Finalize, Checkout.
- Sub-navigation: Demographics, Order Management, Document Library, Chart Abstraction.
- Panel Control: Toggle, Cycle, and other controls.
- Problem List: 0 items.
- Medical/Surgical/Interim: [icon]
- Diagnostic Studies: [icon]
- Family: [icon]
- Social: (highlighted)

Below the navigation, there is a table with the following columns: Encounter Date, Tobacco Type, Smoking Status, Usage Per Day, Pack Years, Date Quit, and Vaping Status. A sidebar on the left lists categories like Substances, Tobacco/Vaping Use, Alcohol/Caffeine, Statuses, Lifestyle, Occupation, Comment, Diet History, and Environmental. At the bottom, there is a button for "Social Determinants of Health" (highlighted), a "Confidential History" checkbox, and an "Add" button.

Demo functionality of Social Determinants of Health Template



Social Determinants of Health template

Active Text link added on these templates:

allergy_histories	fts_histories
bh_brief_assessment	fts_home_page
card_histories	fts_previsit_summary
card_home_page	hpi_medicare_initial
CARD_SocialHx	ob_medical_summary
cm_comprehensive_assessmnt	oph_histories
dental_home_page	ort_home_page
derm_histories_fts	pc_home_page
derm_home_page	Allergy_home_page



Recap

Social, Behavioral and Psychological Data

- **Showed new functionality will allow healthcare provider to have a prebuilt questionnaire template for documenting the social, behavioral and psychological data for the patient**
- Link to the questionnaire from Social History panel in every specialty
- Pre-built form in the system for accessing the Codified Questions and Answers
- Capability to calculate scores and total scores and document interpretation (when applicable) for a questionnaire
- Displaying the score details in document



Provide resources and support to
assess patients' psychosocial
needs



KBM Requirement Overview

- This system shall support the use of a new link for “Community Resources” which will allow the user to select which resource is appropriate for the patient and have this information print onto its own document, the patient plan document and the master documents

KBM Requirement Overview

Requirements

- The system shall support CPC+ Requirements to provide resources and support to assess patients' psychosocial needs
- Add the Community Resource Data
- Community Resources document generation



KBM Requirement Overview

Requirements

- Community Resources in the navigation of Assessment/Plan panel
- Community Resource as sub navigational active text link
- Community Resources link to left navigation bar



Community Resources Template

Used to provide Community Resource information the patient would need

- Clinics, Pharmacies or Labs in and around the vicinity of the patient
- User creates list of resources to share with the patients
- User shares resources with patient during the encounter



Community Resources Template

All Resources grid can be filtered by Type

The screenshot displays the 'Community Resources' application window. At the top, there is a title bar and a close button. Below the title bar, the application header includes the text 'Community Resources' and a checkbox for 'Automatically perform "Include" or "Remove" action on row select.'. To the right of the header is a 'Type' filter dropdown menu, which is currently set to 'Clinic' and is highlighted with a red box. Below the header is a table titled 'All Resources' with a red border around its header and first two rows. The table has seven columns: Type, Resource, Address, Email, Phone Number, Fax Number, and Comments. The first row is 'Clinic' for 'Calvin's Clinic' at '12503 Horsham Road, Suite 1001, Horsham, PA, 19044' with email 'calvin@gmail.com' and phone '2155557676'. The second row is 'Clinic' for 'Seton NW Clinic' at '10534 Research Blvd., Suite 2005, Horsham, PA, 19044' with email 'SNWClinic@gmail.' and phone '2155552005'. Below the table is a button labeled 'Include selected resource'. At the bottom of the window, there is another 'Community Resources' header with the same checkbox and 'Type' filter (set to 'Clinic'). Below this is another 'All Resources' table with the same data as the first table. At the bottom right of the window is a 'Save & Close' button.

Type	Resource	Address	Email	Phone Number	Fax Number	Comments
Clinic	Calvin's Clinic	12503 Horsham Road, Suite 1001, Horsham, PA, 19044	calvin@gmail.com	2155557676		Calvin's is local Emergency Clinic
Clinic	Seton NW Clinic	10534 Research Blvd., Suite 2005, Horsham, PA, 19044	SNWClinic@gmail.	2155552005		Family Practice, Multi-Specialty providers

Community Resources Template

Resources created can be shared with the patients

Automatically

Or

Manually
Added or
Removed

Community Resources

Automatically perform "Include" or "Remove" action on row select. Type ALL

Type	Resource	Address	Email	Phone Number	Fax Number	Comments
Clinic	Calvin's Clinic	12503 Horsham Road, Suite 1001,	calvin@gmail.com	2155557676		Calvin's is local
Clinic	Seton NW Clinic	10534 Research Blvd., Suite 2005, Horsham, PA, 19044	SNWclinic@gmail.	2155552005		Family Practice, Multi-Specialty providers
Lab	LabsRUs North Office	PA, 19044 10577 Brimley Road, Suite 1002, Horsham, PA, 19044	LCN@gmail.com	2155551944		LC North office - Lab Draws

↓ Include selected resource
↑ Remove selected resource

Patient's Resources This visit Prior visits

Date	Type	Resource	Address	Email	Phone Number	Fax Number
05/17/2017	Clinic	Seton NW Clinic	10534 Research Blvd., Suite 2005, Horsham, PA. 19044	SNWclinic@gmail.	2155552005	

Save & Close

Community Resources Template

Accessed from the following places:

- **Community Resources link on left navigation bar**
- ***SOAP template in the Assessment/Plan panel**
 - Exception for Cardiology Specialty
- **Sub navigation link**
 - *SOAP - Cardiology
 - Checkout template
- **Document Library**



Ngkbn Community Resources Template

Ngkbn Community Resources template pop-up

- Accessed and setup on *Configuration Home
- Community Resource Setup link

Community Resource Setup
This utility captures data related to community resources.

*Type: [dropdown] *Resource: [text] Street: [text] City: [text] State: [text] Zip: [text]

Email: [text] Phone Number: [text] Fax Number: [text] Comments: [text]

Clear Add Update Remove

Type	Resource	Address	Email	Phone Number	Fax Number	Comments
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Save & Close

Demo functionality of Community Resources Template



Recap of Topics



Recap of Topics

- **CPC+ Requirements**
 - What is CPC+
- **Risk Stratifying and Empaneling Patients**
 - Assigning Risk and Care Team
 - Generate Practice Care Team and Risk Score Review Report
- **Social, Behavioral and Psychological Data**
 - Social Determinants of Health Template
- **Provide resources and support to assess patients' psychosocial needs**
 - Community Resources Template





Thank You

