How to Meet Your Measure:
iCare (BQI) v2.3.3
Patient List, Reminders

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Objective

At the end of this session, participants should be able to use iCare to meet MU measures by:

Creating and Using Patient Lists
- Define a new patient list
- Display and review a patient list

Tracking Patient Reminders for Performance Measure Reporting
- Document patient notifications
iCare’s Role in MU2014

MU Objective

Patient List

• Generate lists of patients by specific conditions to use for quality improvement, reduction of disparities, research, or outreach. (EP, EH)

Reminders

• Use clinically relevant information to identify patients who should receive reminders for preventive/follow-up care and send these patients the reminder, per patient preference. (EP)

2014 Edition EHR Certification Criteria § 170.314(a)(14) (Patient list creation)
How to Meet Your Measure: Patient List
**Objective:** Generate lists of patients by specific conditions to use for quality improvement, reduction of disparities, research, or outreach. (EP, EH)

**Measure:** Generate at least one report listing patients of the EP, EH, or CAH with a specific condition.

**Exclusion:** None

**Criteria:** Enables a user to electronically and dynamically select, sort, access, and create patient lists by date and time based on each one and at least one combination of the following data:

i. Problems
ii. Medications
iii. Medication allergies
iv. Demographics
v. Laboratory tests and values/results
vi. Ambulatory setting only - patient communication preferences
§170.314 (a)(14) Patient list creation – iCare (BQI) Workflow

Application Entry Point

User Login → Does list need to be created?

Yes → Create new Patient List

No → Open desired Patient List

View Patients
User can customize view to focus on available definitions

Use Panel Definition to define new list

Available Definitions
i. Problems
ii. Medications
iii. Medication Allergies
iv. Demographics
v. Labs and Results/Values
vi. Communication Method
When defining panels you are effectively narrowing down the list of patients you will be presented with.

Each additional filter applied to your definition will further narrow your results reducing the number of patients in the list.
Patient List Screenshots

i. Problems
ii. Medications
iii. Medication allergies
iv. Demographics
v. Laboratory tests and values/results
vi. Ambulatory setting only – patient communication preferences
i. Problem – Panel Definition

Users have several options available to include one or more problems or by taxonomy.
ii. Medications - Panel Definition (Existing Feature)
iii. Medication Allergies – Panel Definition (Existing Feature)

Users can select one or multiple allergies which can include medication allergies.
iv. Demographics - Panel Definition
Preferred Language
iv. Demographics - Panel Definition
Ethnicity and Race
iv. Demographics - Panel Definition

Cause of Death
(v) Labs - Panel Definition
Results / Values

Ability to filter based on lab tests currently exists.

Adding functionality to search by lab results/values. "Edit" presents the user with test-appropriate result/value selection options.
(vi) Preferred Communication Method - Panel Definition
Viewing Patient Lists

List is presented in grid format. User can customize the columns presented to focus in on specific data.
iCare uses an additional tab/view to display more complex patient data.

Introduced to better support the potential large amount of data that may be presented to a user based on how a panel is defined.
### Example of Combination List

- **Lab Tests**

<table>
<thead>
<tr>
<th>Patient Name</th>
<th>DOB</th>
<th>Communication Preference</th>
<th>Race</th>
<th>Ethnicity</th>
<th>Preferred Language</th>
<th>Allergies</th>
<th>Date</th>
<th>LDL Cholesterol</th>
<th>Lab Test</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>PHONE</td>
<td>AMERICAN INDIAN OR ALASKA NATIVE</td>
<td>NOT HISPANIC OR LATINO</td>
<td>ENGLISH</td>
<td>No Known Allergies</td>
<td>Jun 05, 2011</td>
<td>LDL CHOLESTEROL</td>
<td>150</td>
</tr>
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<td>ENGLISH</td>
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<td>Nov 03, 2009</td>
<td>LDL CHOLESTEROL</td>
<td>150</td>
</tr>
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<td>Oct 04, 2012</td>
<td>LDL CHOLESTEROL</td>
<td>151</td>
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<td>LDL CHOLESTEROL</td>
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<td>Feb 11, 2008</td>
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<td>ENGLISH</td>
<td>No Known Allergies</td>
<td>Dec 30, 2011</td>
<td>LDL CHOLESTEROL</td>
<td>154</td>
</tr>
<tr>
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<td>AMERICAN INDIAN OR ALASKA NATIVE</td>
<td>NOT HISPANIC OR LATINO</td>
<td>ENGLISH</td>
<td>No Known Allergies</td>
<td>Dec 06, 2010</td>
<td>LDL CHOLESTEROL</td>
<td>155</td>
</tr>
</tbody>
</table>
How to Meet Your Measure: Reminders
**Objective:** Use clinically relevant information to identify patients who should receive reminders for preventive/follow-up care and send these patients the reminder, per patient preference. (EP)

**Measure:** More than 10% of all unique patients who have had two or more office visits with the EP within the 24 months before the beginning of the EHR reporting period were sent a reminder, per patient preference when available.

**Exclusion:** Any EP who has had no office visits in the 24 months before the EHR reporting period.

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4. Demographics
5. Laboratory tests and values/results
6. Ambulatory setting only - patient communication preferences
Reminders Workflow
Preventative Care

iCare (BQI) Patient Notification (Reminders) Workflow

Define Panel based on Reminder → Open Panel and Navigate to Definition Details Tab: Reminders → Patient has documented preference?

No → iCare user’s notification preference

Yes → Select Patients → Click Batch Process

Select Letter from available options

Select Chart Review (logged for Performance Measure documentation)

Will Chart Review be created?

No → Reminder Complete

Yes → Save/Sign/Print Letter → Create Chart Review

Click Create Letter using TIU API

Reminder Complete

Select Phone / Email from available options (documentation purposes only)

Reminder Complete
Reminders definition in support of patient definition performance measures.
Performance measure is calculated by provider and states the patient must have had two (2) visits with the provider in the past 24 months.
Reminders Notification Process

1. Select Patient(s)

2. Notification Process

3. Select the notification preference

WARNING: If a patient preference is noted here, you must use this preference to get performance measure credit!
Use iCare to meet MU measures by:
• Creating Patient Lists
• Tracking Patient Reminders for Performance Measure Reporting
Define a new patient list
Display and review a patient list
Use a patient list
Document patient notifications
Questions and Discussion