NEXTGEN CARE GUIDELINES DEMONSTRATION

This demonstration reviews usage of Care Guidelines. Details of the workflow will likely vary somewhat, depending on practice policy & clinic layout, though this should give you a good idea of NextGen functionality.

This has been prepared with EHR 5.8 & KBM 8.3. Subsequent updates may display cosmetic & functional changes.

Use the keyboard or mouse to pause, review, & resume as necessary.

Introduction

- Care Guidelines are basically reminders that can be employed to help providers & staff keep track of health maintenance & disease management measures, especially those that need to be addressed on a recurring basis.
- Think of it as the page near the front of a paper chart you may have had in the past with a "do-list" that you had to manually review & update—only now the program will help you do some of that.

Introduction

- Some examples are:
  * Vaccinations
  * Mammograms
  * Colon cancer screening
  * Recurring lab tests
- Initially we will start with a relatively small handful of evidence-based recommendations, supported by entities like the CDC & the USPSTF.
- Over time we may add more Guidelines, based upon changing recommendations or specialty needs.

Introduction

- Those who have used NextGen for a few years will notice that Guidelines have been in existence in some form for a while. However, they were so dysfunctional that we have not attempted to use them.
- We now feel like, while they're not perfect, they are behaving well enough to start utilizing them in our practice.

Introduction

- NextGen has used various terminology for Guidelines over the years, including:
  * Care Guidelines
  * Clinical Guidelines
  * Guidelines
  * Protocols
  * Recommended Care
- Unfortunately, you'll still see a mixture of these terms that can lead to some confusion.

Introduction

- If you want to *try* to make some sense of how they currently appear to be using these terms, here goes.

  * **Care Guidelines** = **Clinical Guidelines**: The global term for all Guidelines & Recommended Care. These are made up of:

    1) **Guidelines** (formerly, & sometimes still, known as **Protocols**): These are tangible things to do, e.g. vaccinations & recurring tests like mammograms, pap smears, & blood work.

    2) **Recommended Care**: Less tangible things to consider, like "best practice" considerations for disease management.

Introduction

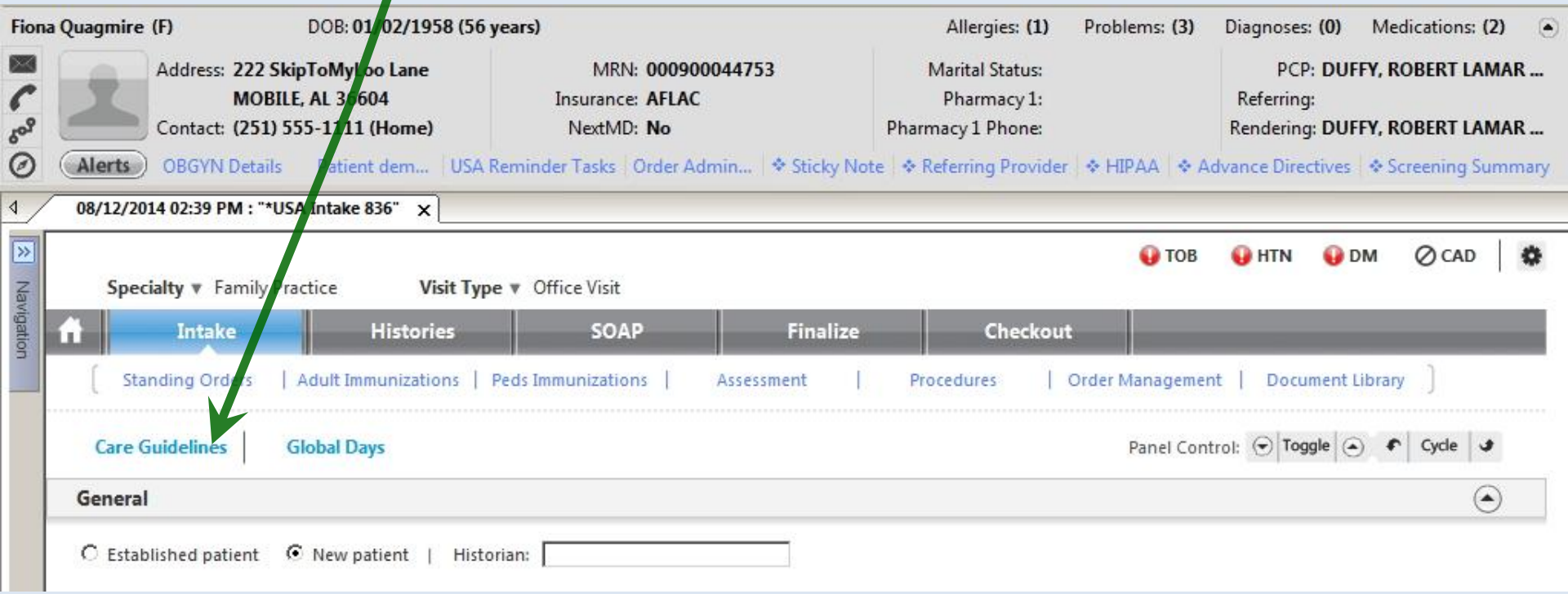
- Try not to worry too much about the inconsistent terms.
- For the most part, I'll refer to **Guidelines** as recurrent tests & procedures. The program should tell you when these are due, remember the date they're done, & remind you when they're due again later on. This is what we'll mainly focus on.
- Think of **Recommended Care** as a list of suggestions or FYIs. They're generally not dated or "checked off."

Activating Guidelines

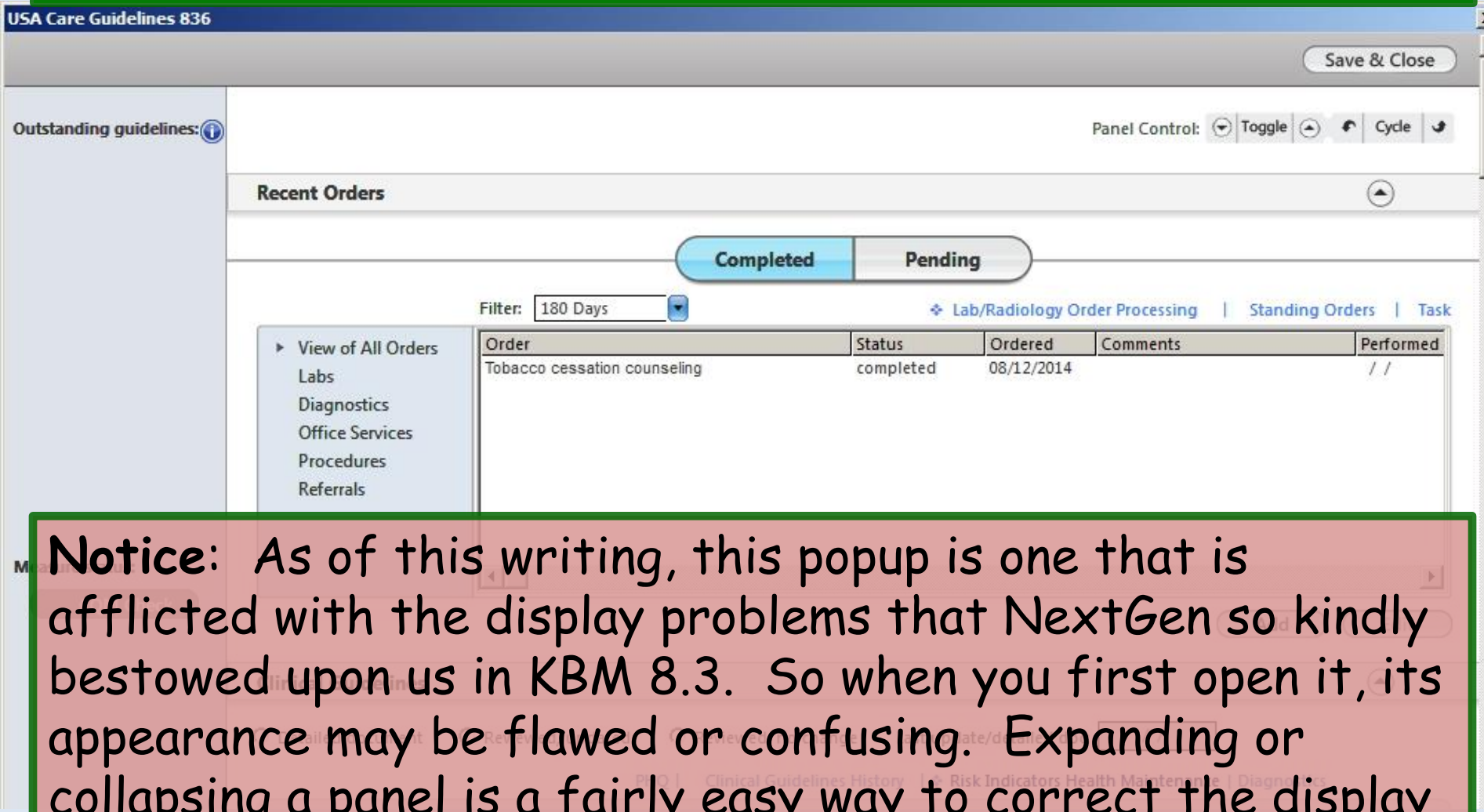
- Guidelines have to be "activated," or assigned to a patient.
- All adults should have the Health Maintenance Guideline activated.
- Patients with some chronic diseases will need to have specific Guidelines activated for these problems as well.
- Patients may also have concurrent illnesses or risks that modify Guidelines, e.g. changing start age, frequency, or eliminating them.

Our example patient is a 56 year old female with diabetes, hypertension, & tobacco abuse.

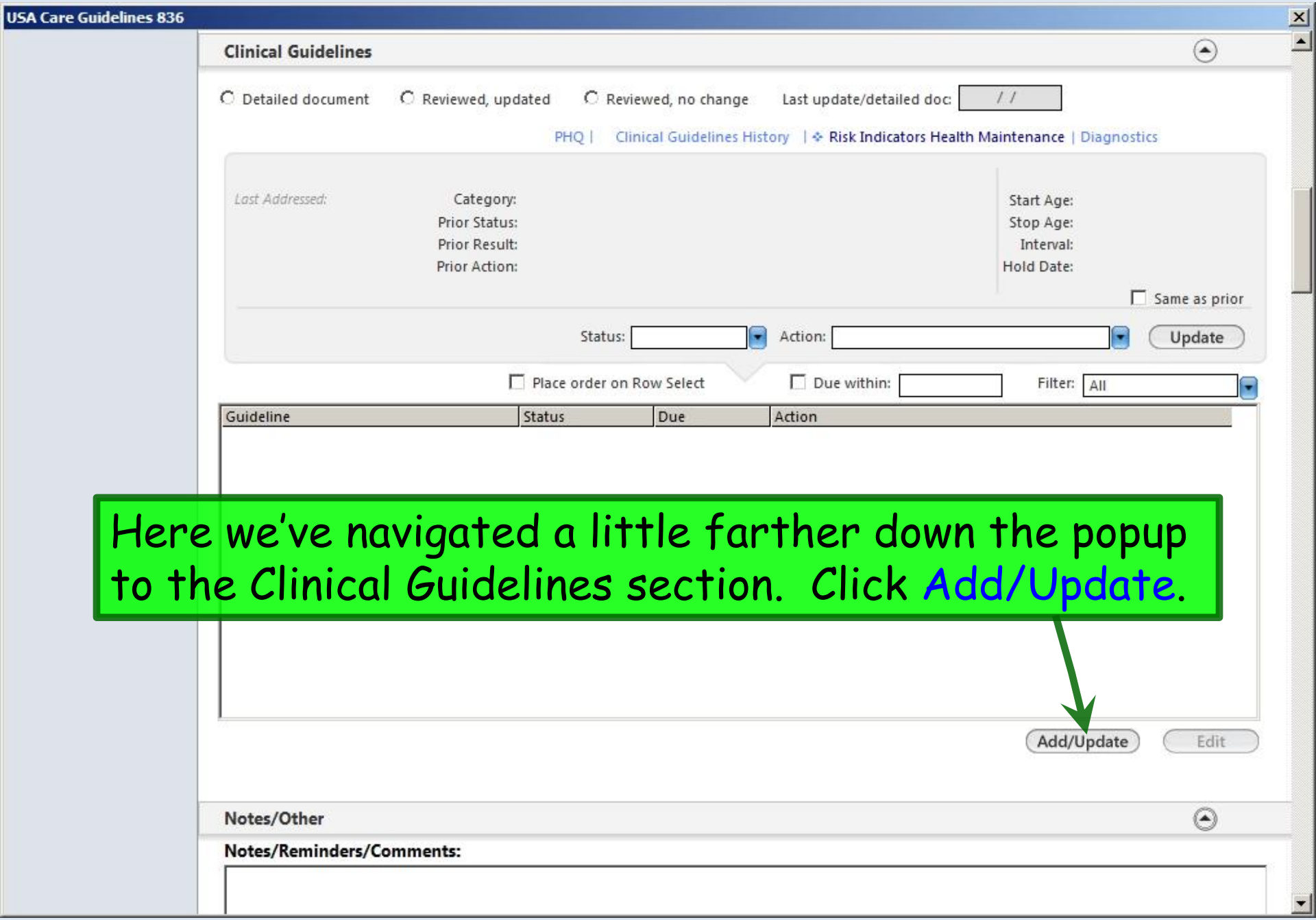
Guidelines are accessed through a link at the top of the tabbed workflow in NextGen. Click Care Guidelines.

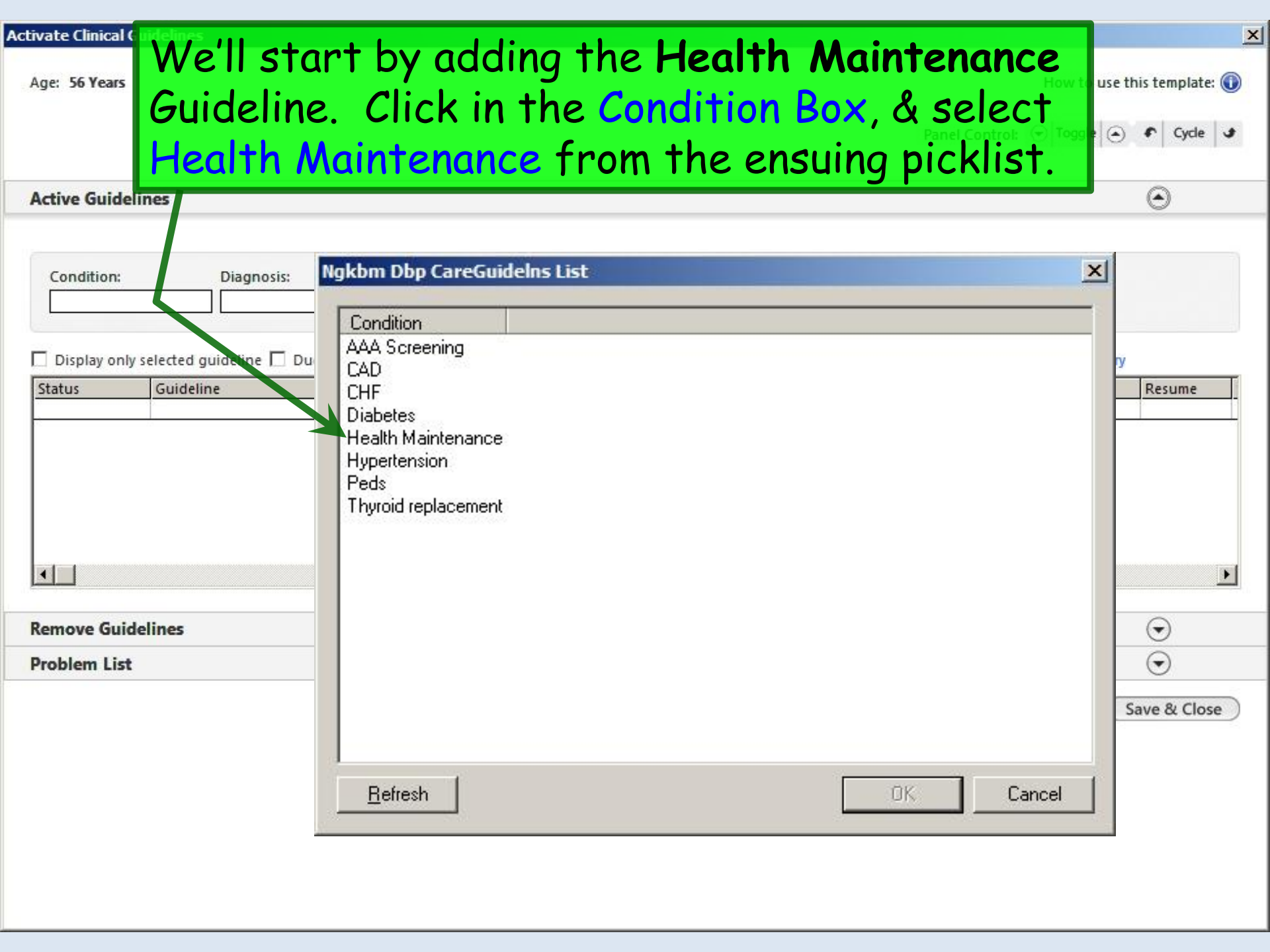


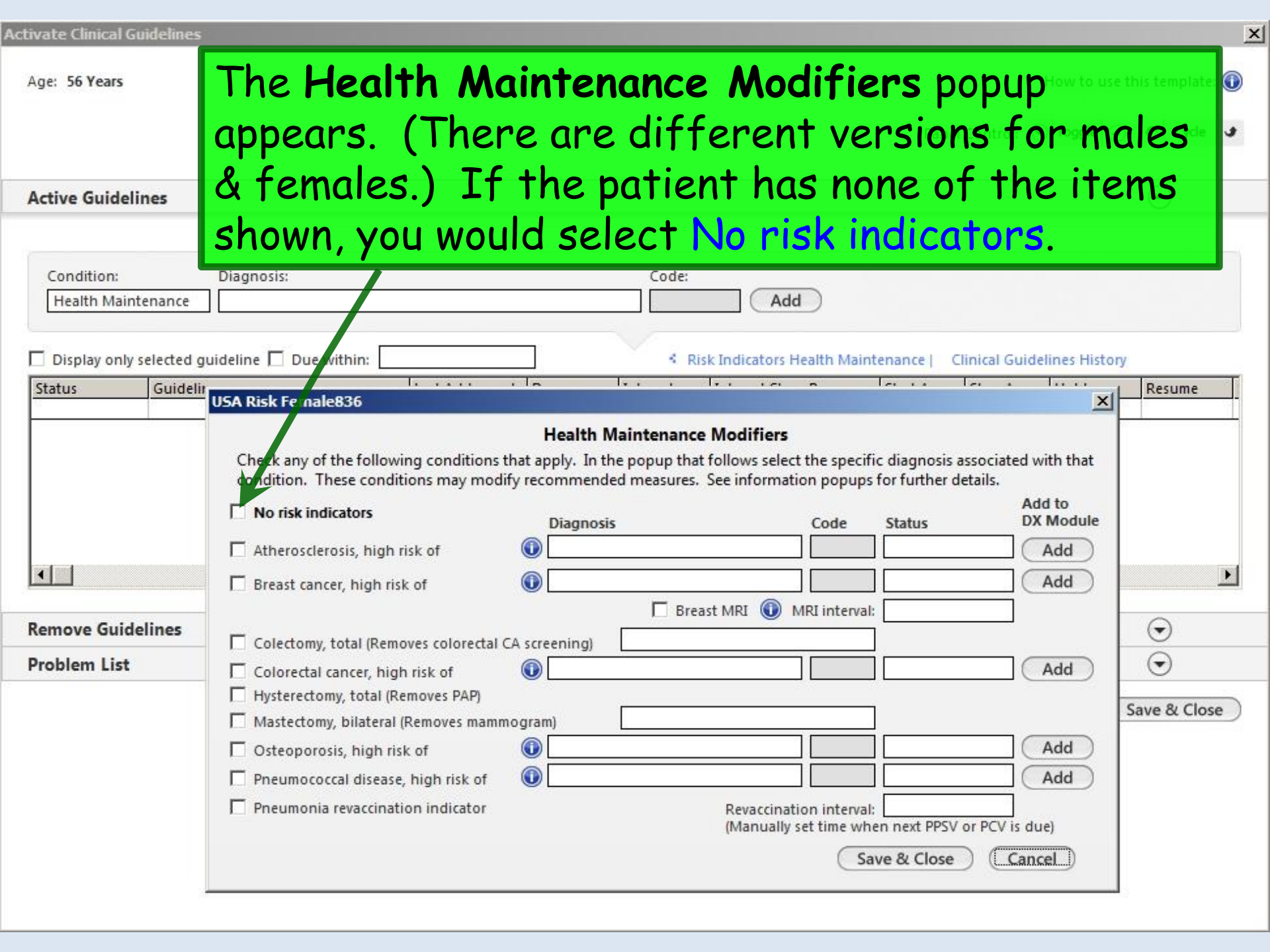
This opens the **Care Guidelines** popup. At the top of this you'll see a miniature version of the **Order Management grid**, which can come in handy.



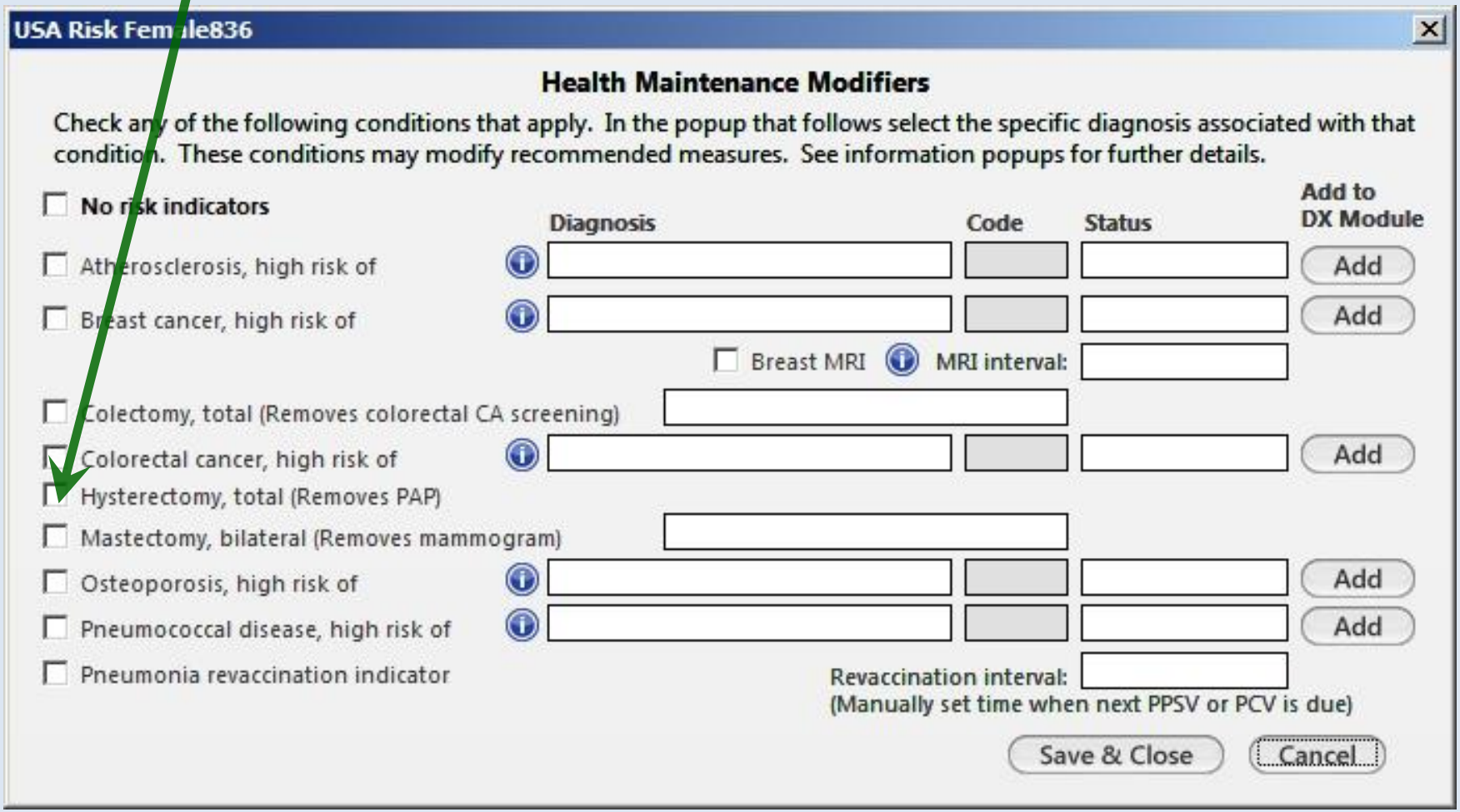
Notice: As of this writing, this popup is one that is afflicted with the display problems that NextGen so kindly bestowed upon us in KBM 8.3. So when you first open it, its appearance may be flawed or confusing. Expanding or collapsing a panel is a fairly easy way to correct the display problem—though it's annoying to have to do such a thing.


USA Care Guidelines 836
Clinical Guidelines
Detailed document
Reviewed, updated
Reviewed, no change
Last update/detailed doc:
/ /
PHQ |
Clinical Guidelines History
| Risk Indicators Health Maintenance | Diagnostics
Last Addressed:
Category:
Prior Status:
Prior Result:
Prior Action:
Start Age:
Stop Age:
Interval:
Hold Date:
Same as prior
Status:
Action:
Update
Place order on Row Select
Due within:
Filter:
All
Guideline
Status
Due
Action
Here we've navigated a little farther down the popup to the Clinical Guidelines section. Click Add/Update.
Add/Update
Edit
Notes/Other
Notes/Reminders/Comments:

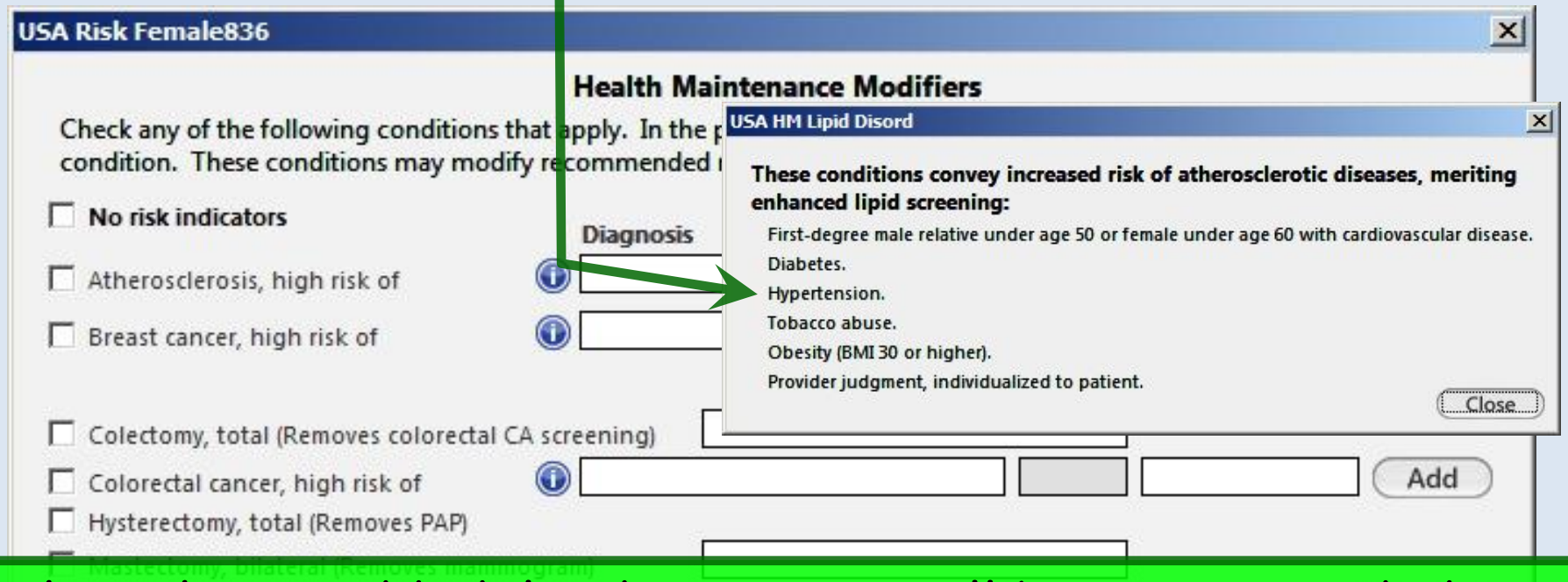

We'll start by adding the Health Maintenance Guideline. Click in the Condition Box, & select Health Maintenance from the ensuing picklist.
Activate Clinical
Age: 56 Years
How to use this template:
Panel Control:
Toggle
Cycle
Active Guidelines
Condition:
Diagnosis:
Display only selected guideline
Status
Guideline
Resume
Remove Guidelines
Problem List
Save & Close
Ngkbm Dbp CareGuidelns List
Condition
AAA Screening
CAD
CHF
Diabetes
Health Maintenance
Hypertension
Peds
Thyroid replacement
Refresh
OK
Cancel


Activate Clinical Guidelines
Age: 56 Years
The Health Maintenance Modifiers popup appears. (There are different versions for males & females.) If the patient has none of the items shown, you would select No risk indicators.
Active Guidelines
Condition:
Health Maintenance
Diagnosis:
Code:
Add
Display only selected guideline
Due within:
Risk Indicators Health Maintenance |
Clinical Guidelines History
Status
Resume
USA Risk Female836
Health Maintenance Modifiers
Check any of the following conditions that apply. In the popup that follows select the specific diagnosis associated with that condition. These conditions may modify recommended measures. See information popups for further details.
No risk indicators
Diagnosis
Code
Status
Add to DX Module
Atherosclerosis, high risk of
Breast cancer, high risk of
Add
Breast MRI
MRI interval:
Colectomy, total (Removes colorectal CA screening)
Colorectal cancer, high risk of
Hysterectomy, total (Removes PAP)
Mastectomy, bilateral (Removes mammogram)
Osteoporosis, high risk of
Pneumococcal disease, high risk of
Pneumonia revaccination indicator
Revaccination interval:
(Manually set time when next PPSV or PCV is due)
Save & Close
Cancel
Remove Guidelines
Problem List
Save & Close

Let's look at this popup for a minute. There are several conditions here that modify test selection, age, or frequency. They're generally self-explanatory. E.G., if the patient has had a total hysterectomy, you can check that box to exclude pap smears.

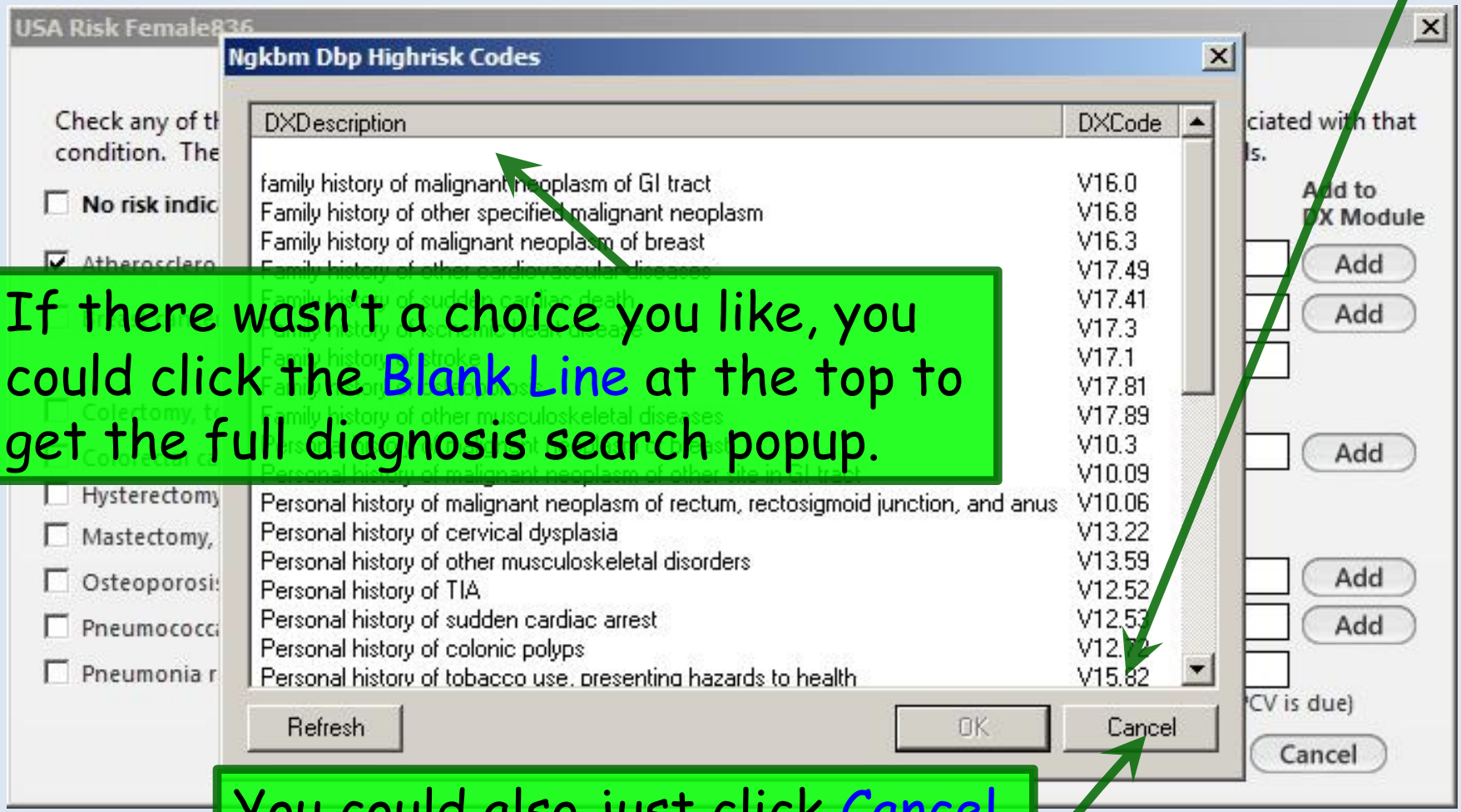


Notice the blue Information Buttons. These give you further help when deciding when to use these checkboxes. E.G., the Atherosclerosis, high risk of Info Button gives you some conditions that convey higher-than-average cardiovascular risk.



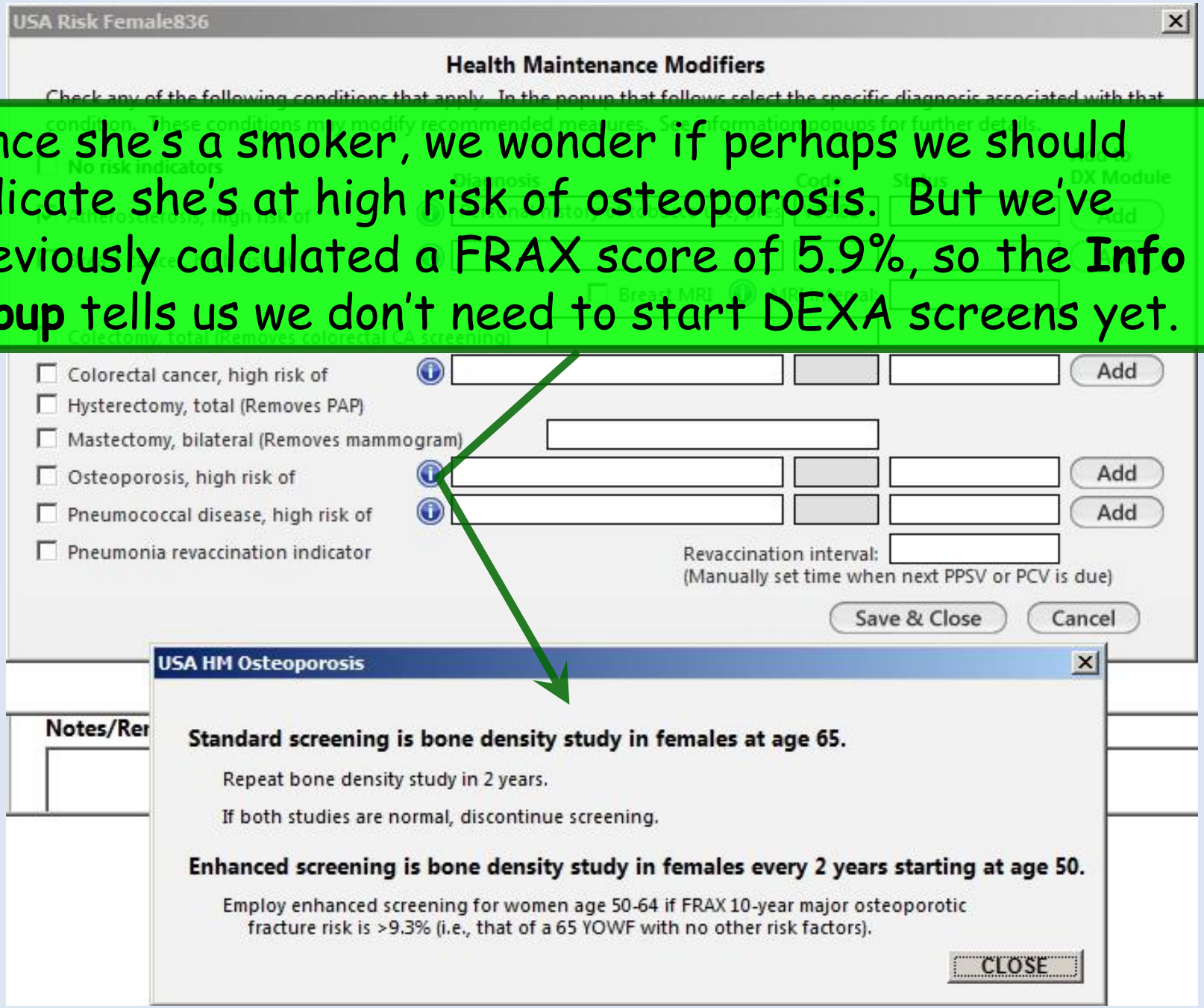
When this is added, lipid screening will be recommended every 5 years starting at age 20, instead of the normal-risk USPSTF recommendations. This patient smokes, so we'll add this.

A picklist will appear prompting you to select a diagnosis justifying this high risk. Sometimes there are multiple logical choices. Here we could select V15.82.



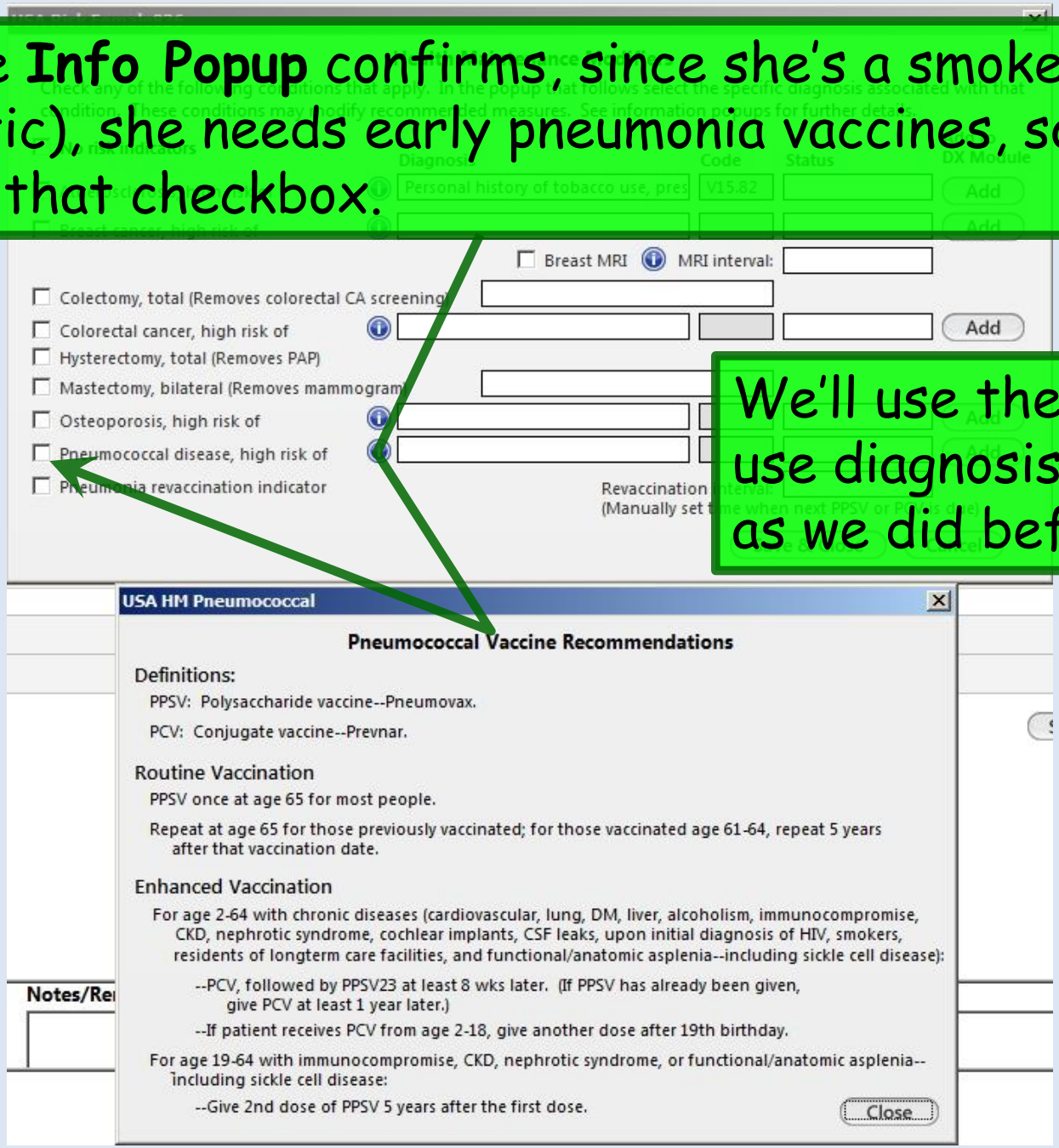
If there wasn't a choice you like, you could click the Blank Line at the top to get the full diagnosis search popup.

You could also just click Cancel to proceed without a diagnosis.



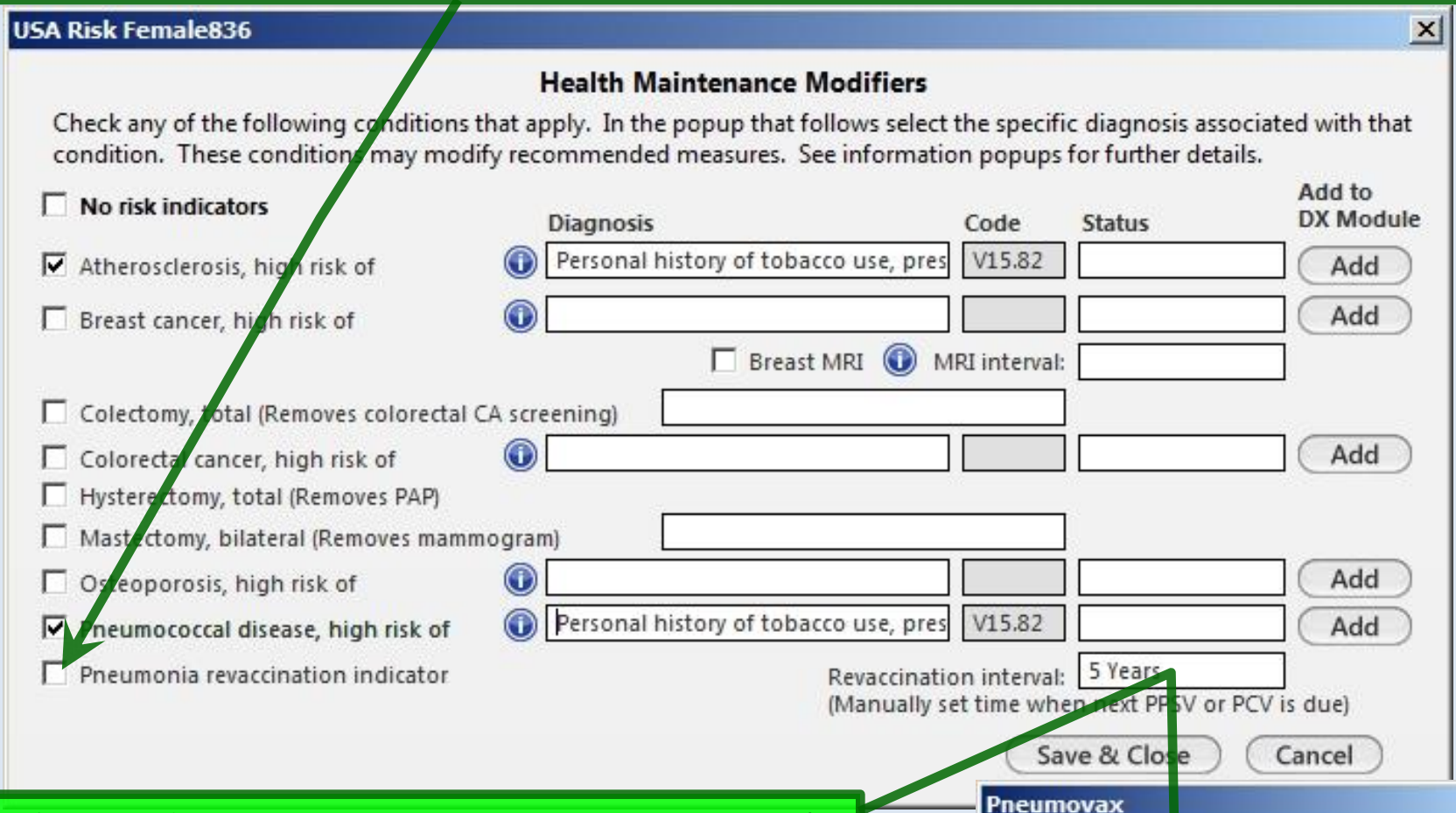
Since she's a smoker, we wonder if perhaps we should indicate she's at high risk of osteoporosis. But we've previously calculated a FRAX score of 5.9%, so the **Info Popup** tells us we don't need to start DEXA screens yet.

As the **Info Popup** confirms, since she's a smoker (& a diabetic), she needs early pneumonia vaccines, so we'll check that checkbox.

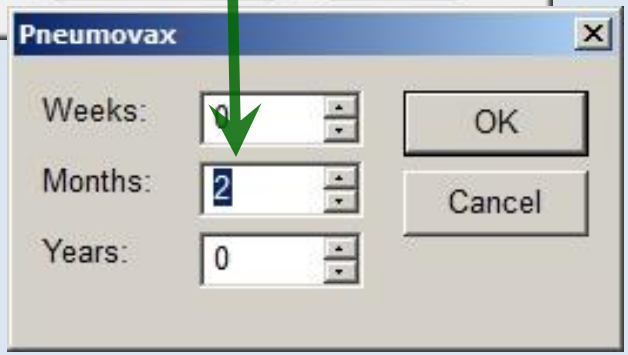


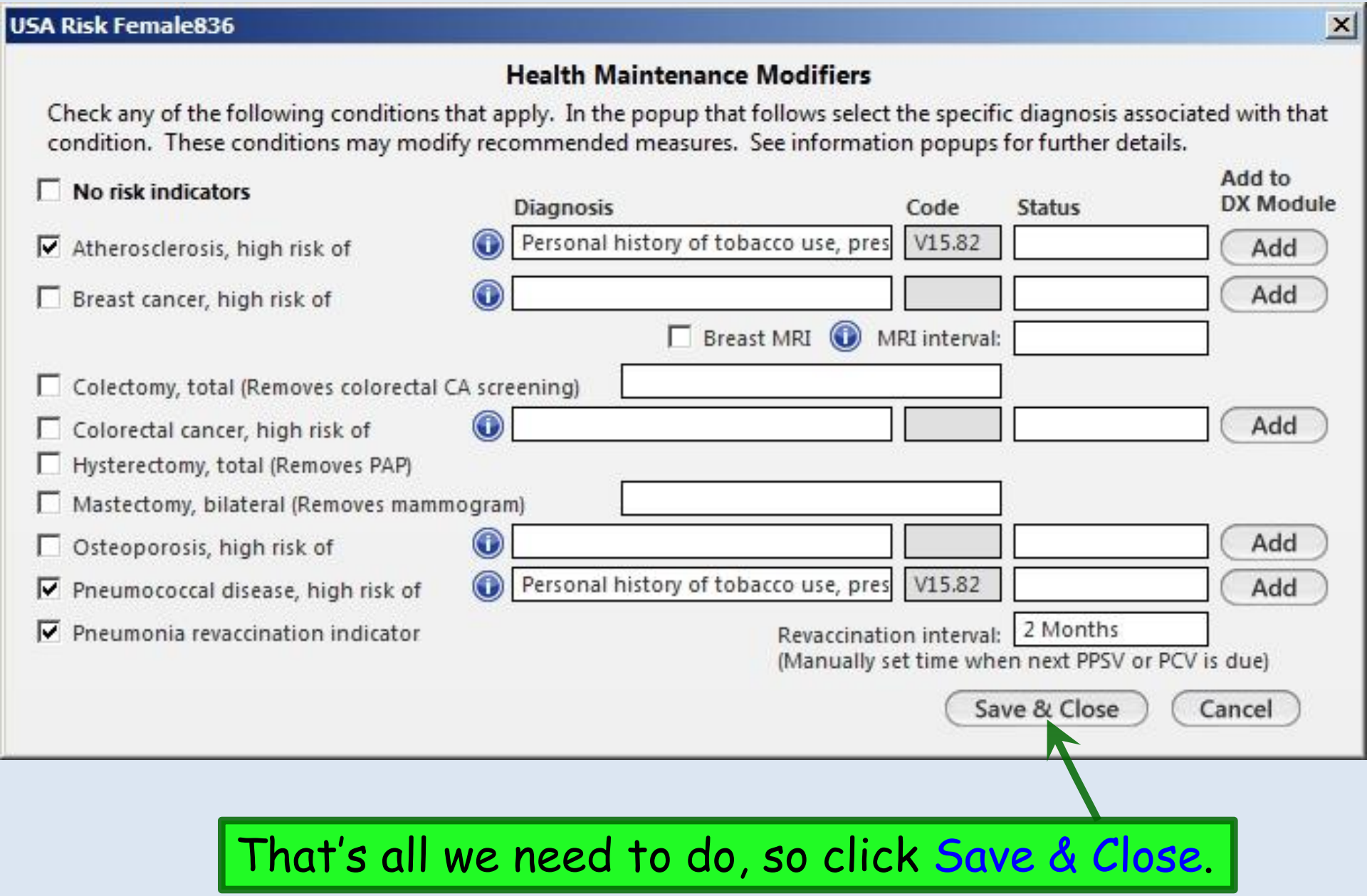
We'll use the tobacco use diagnosis for this as we did before.

We'll plan on giving her Prevnar today, & Pneumovax in 2 months. Check Pneumonia revaccination indicator.



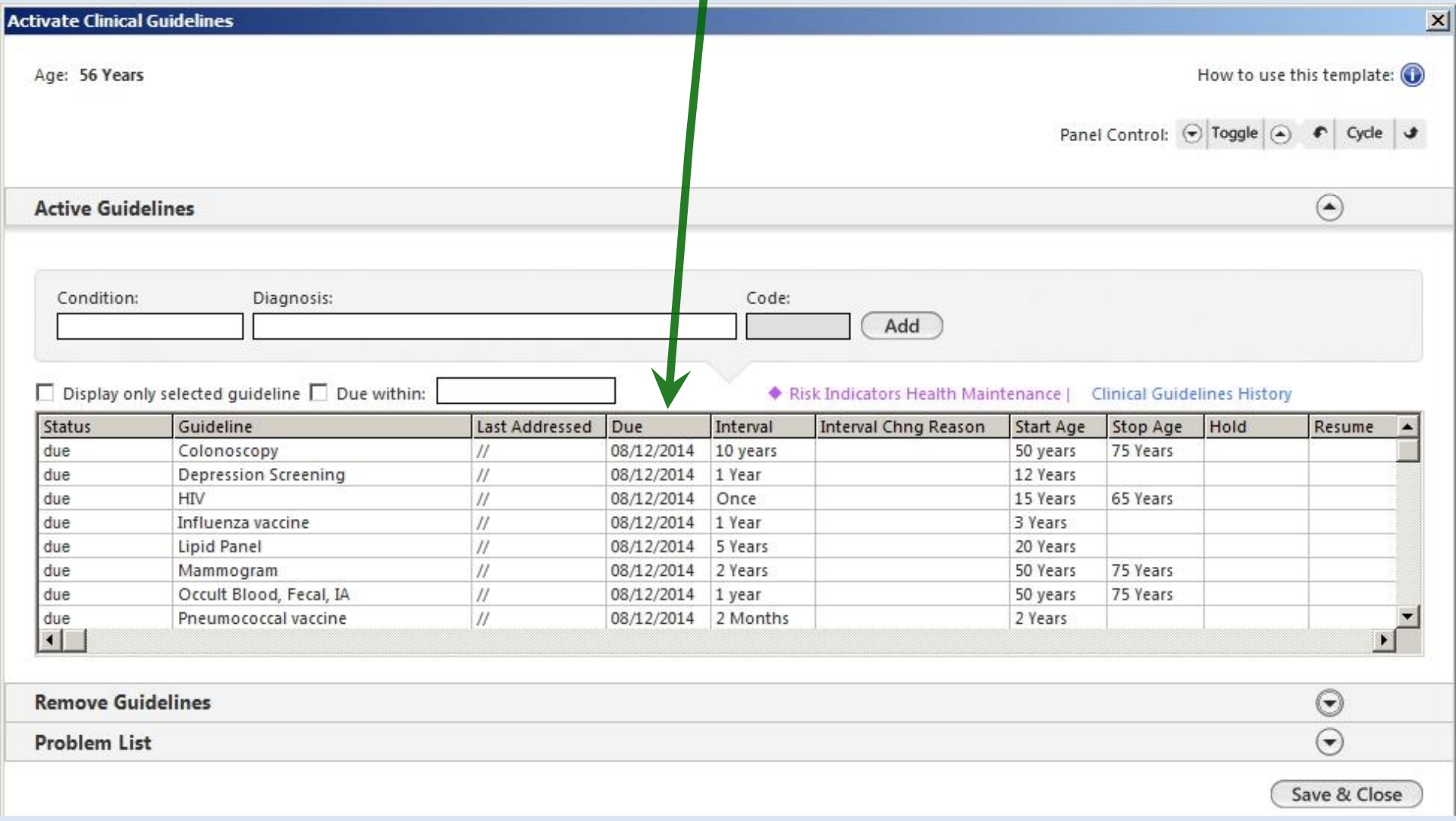
Click in the Revaccination interval box, & change it to 2 months.





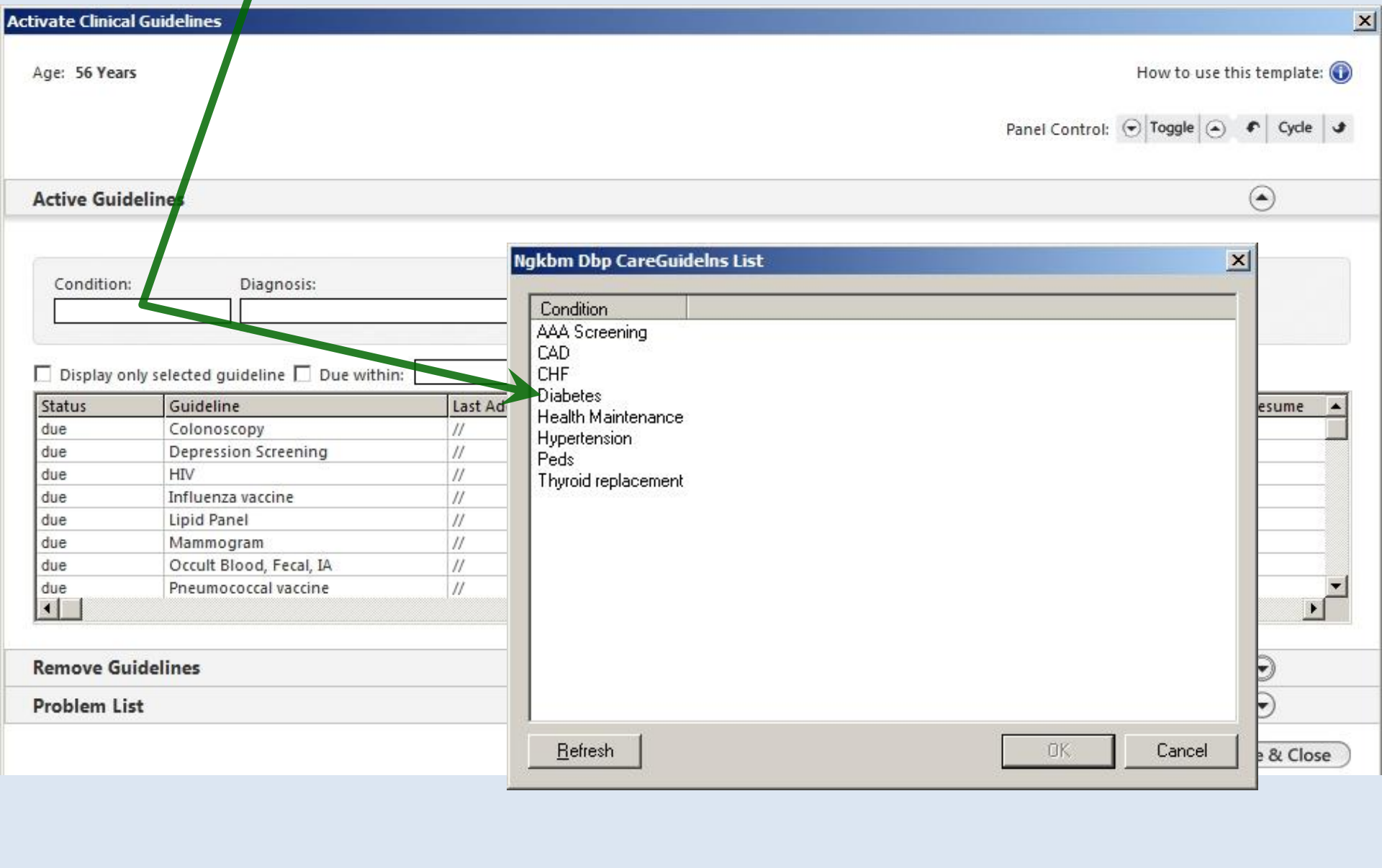
That's all we need to do, so click Save & Close.

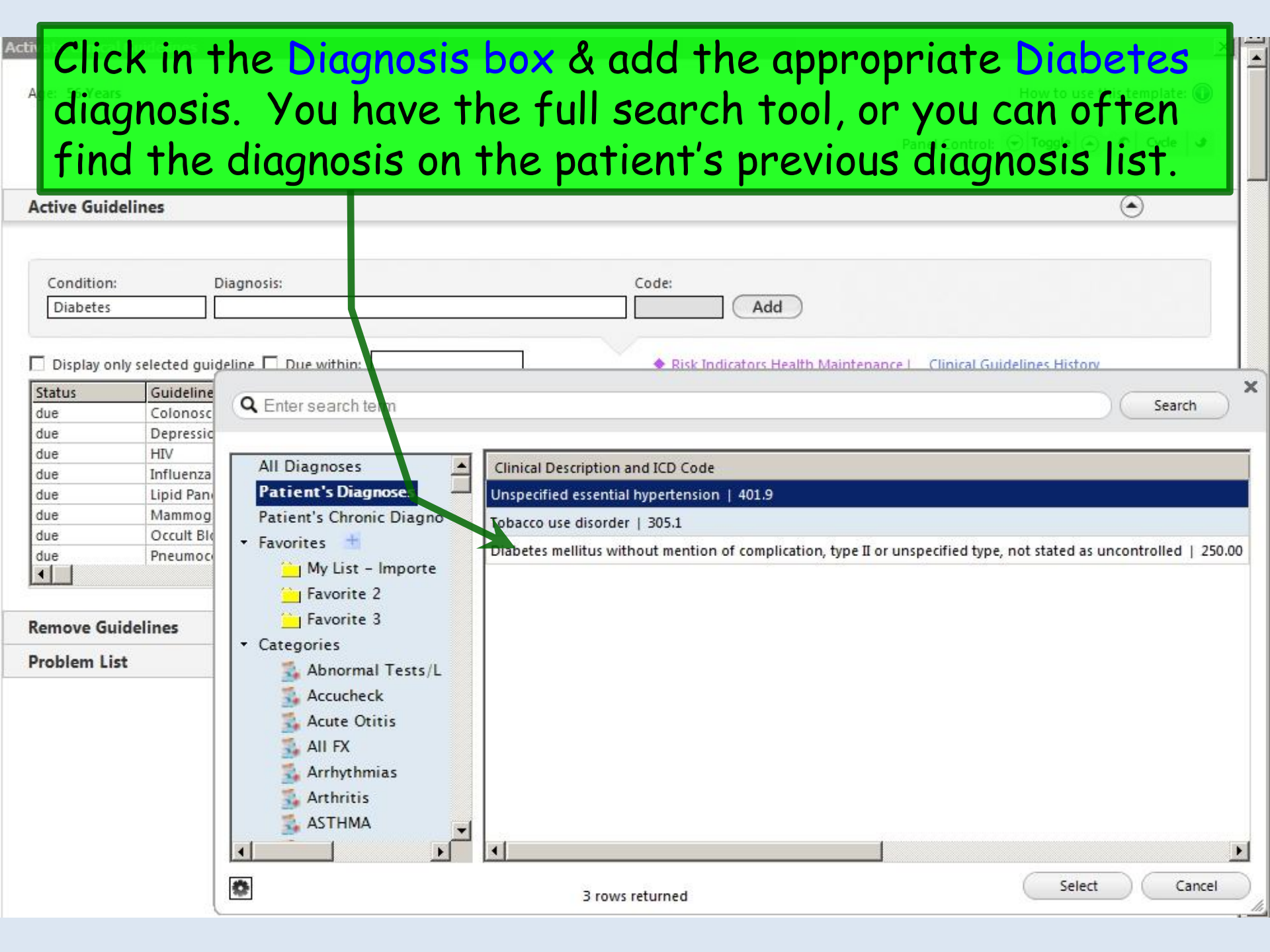
A list of Health Maintenance measures that are due appears. If some of these have been recently documented in the system, the **Last Addressed** & **Due** dates will reflect that.

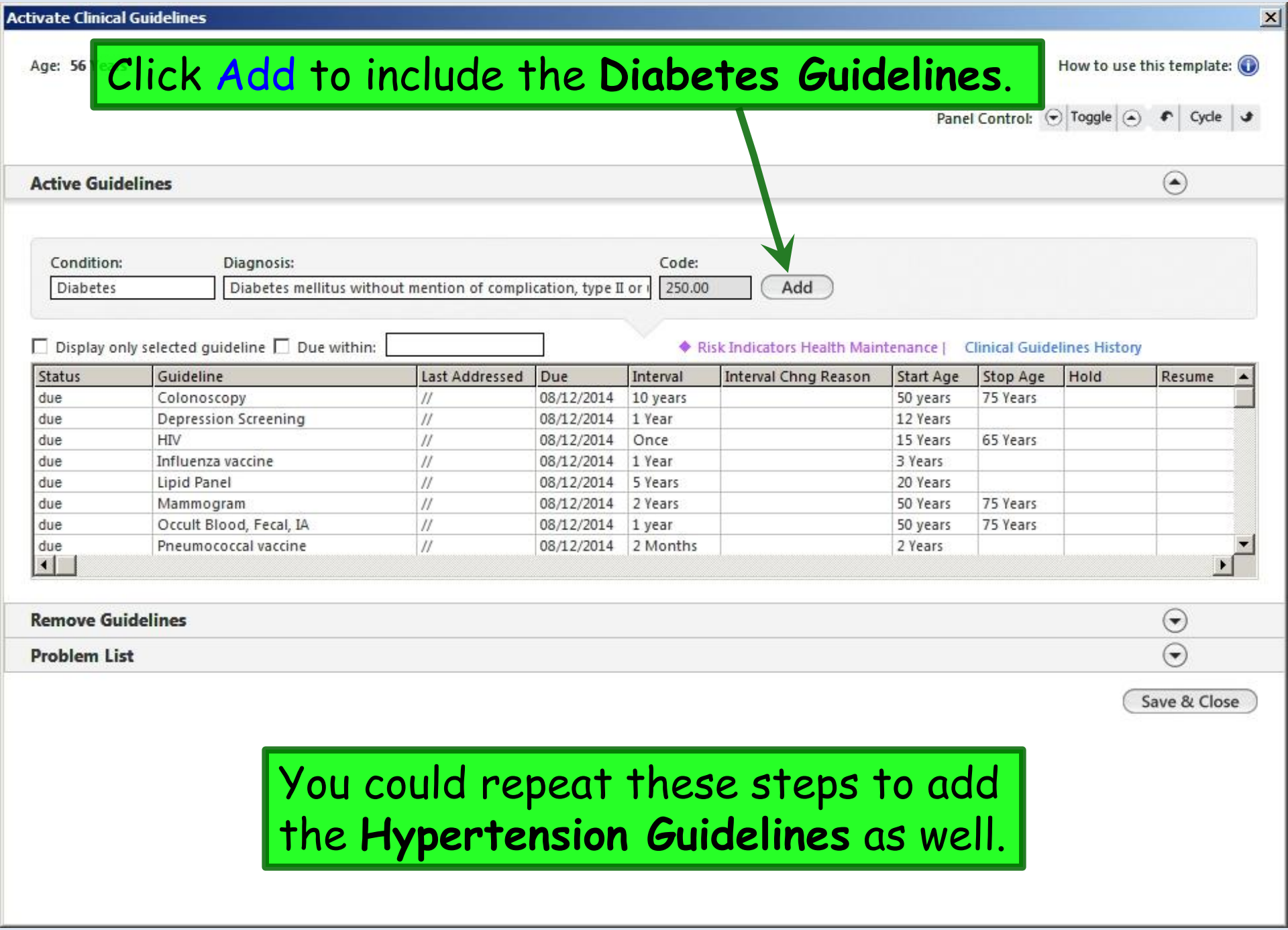


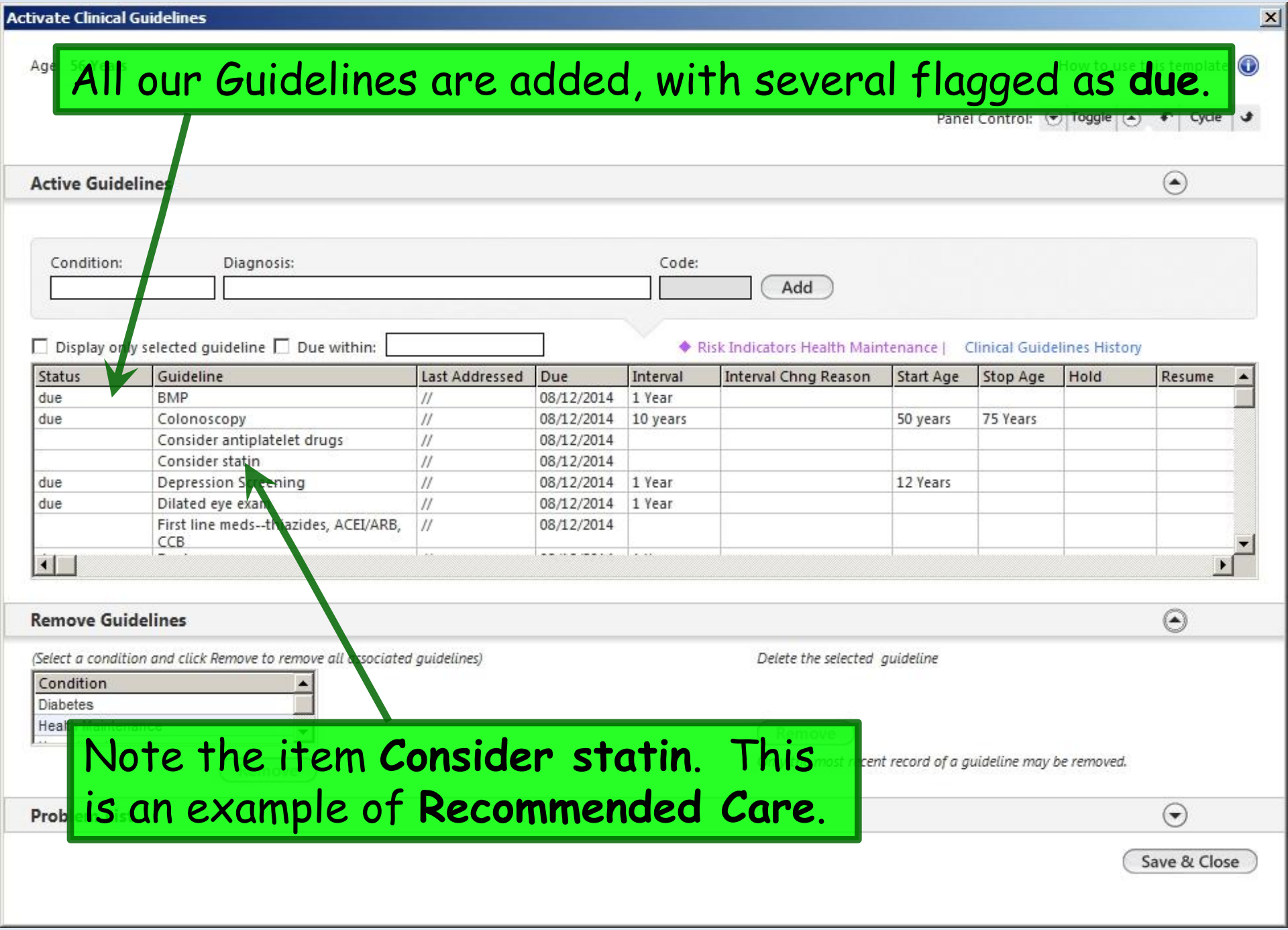
Status	Guideline	Last Addressed	Due	Interval	Interval Chng Reason	Start Age	Stop Age	Hold	Resume
due	Colonoscopy	//	08/12/2014	10 years		50 years	75 Years		
due	Depression Screening	//	08/12/2014	1 Year		12 Years			
due	HIV	//	08/12/2014	Once		15 Years	65 Years		
due	Influenza vaccine	//	08/12/2014	1 Year		3 Years			
due	Lipid Panel	//	08/12/2014	5 Years		20 Years			
due	Mammogram	//	08/12/2014	2 Years		50 Years	75 Years		
due	Occult Blood, Fecal, IA	//	08/12/2014	1 year		50 years	75 Years		
due	Pneumococcal vaccine	//	08/12/2014	2 Months		2 Years			

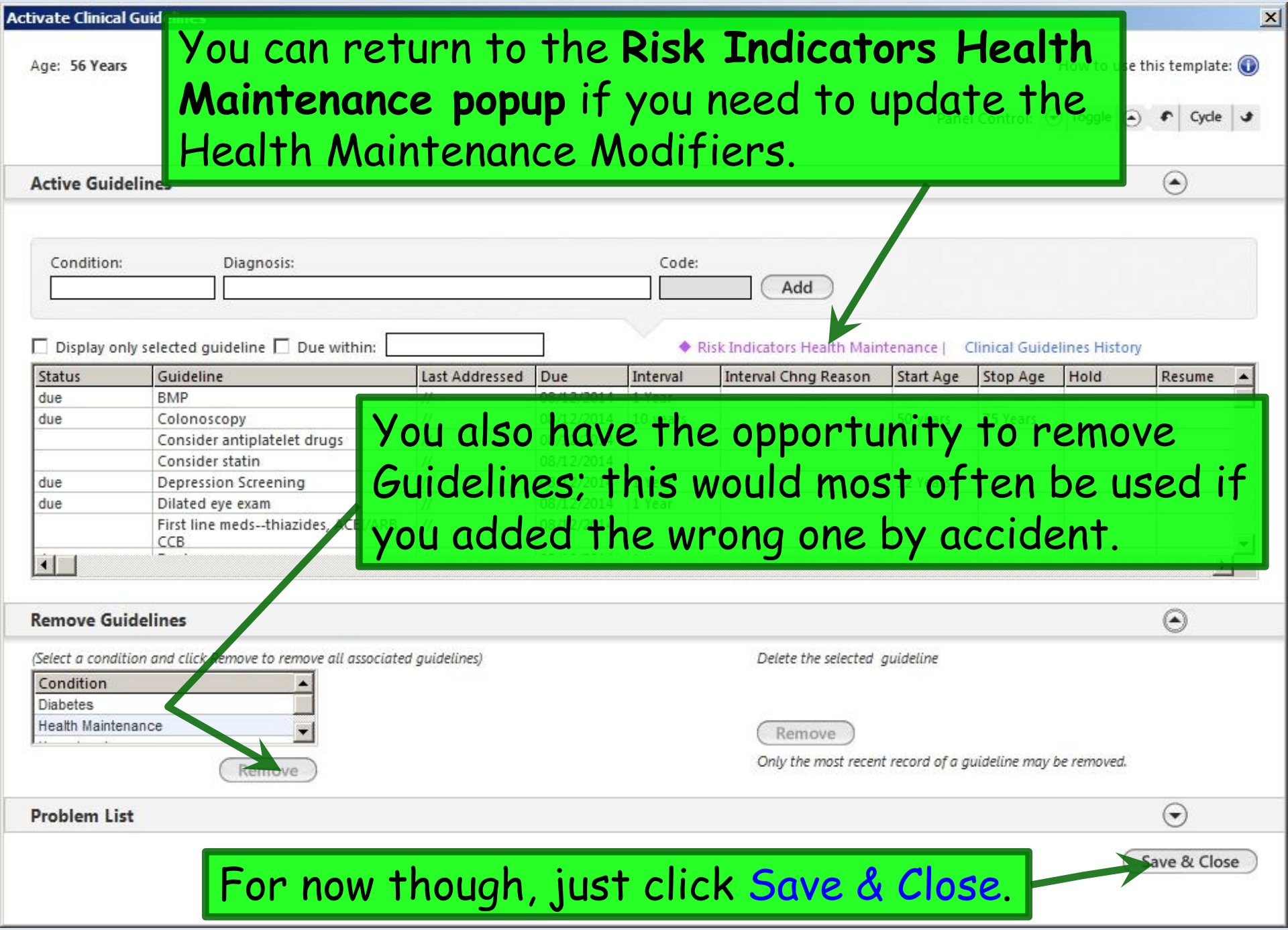
Click in the Condition box once more, & select Diabetes from the picklist.

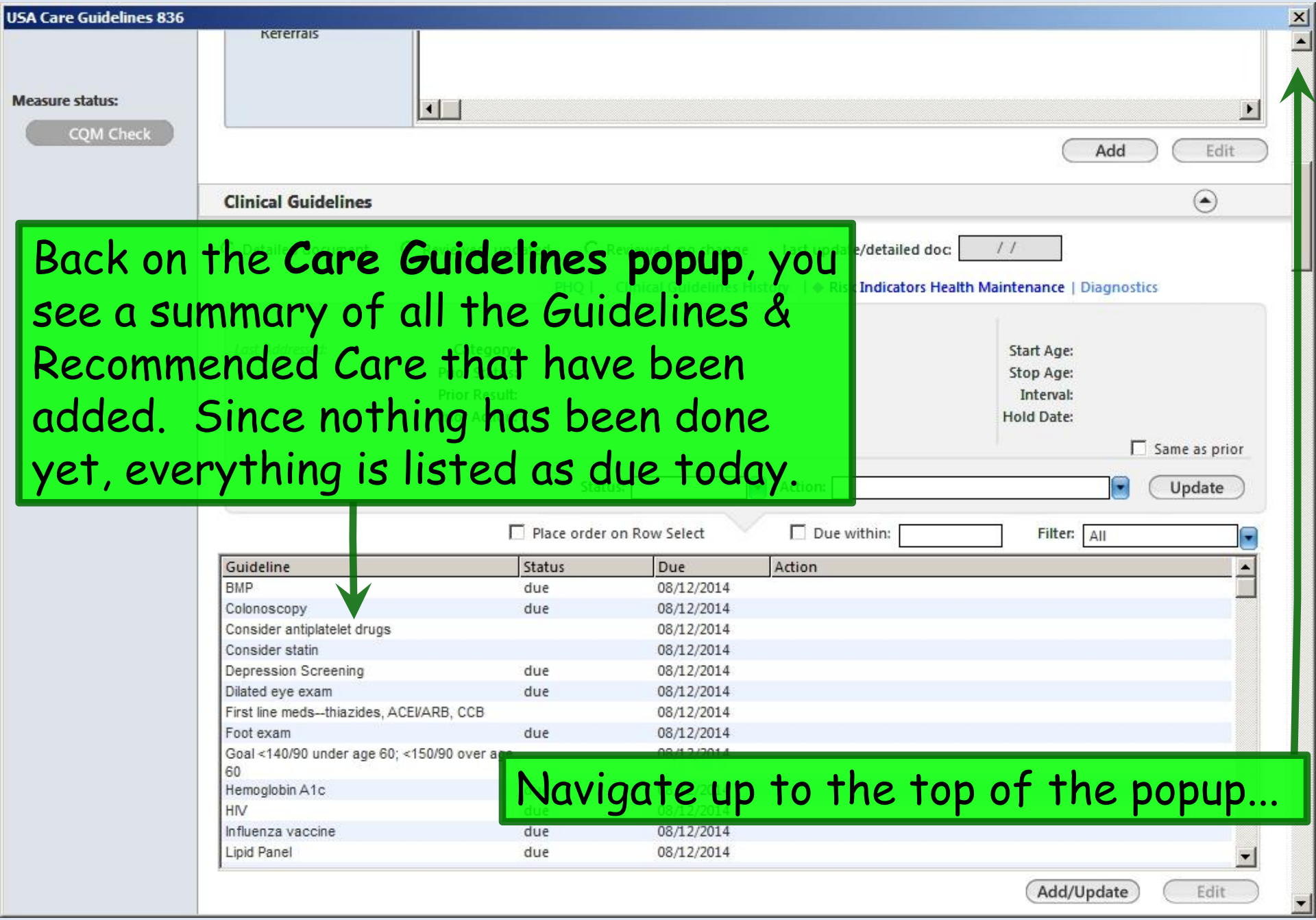



Click in the Diagnosis box & add the appropriate Diabetes diagnosis. You have the full search tool, or you can often find the diagnosis on the patient's previous diagnosis list.
Active Guidelines
Condition:
Diabetes
Diagnosis:
Code:
Add
Display only selected guideline
Due within:
Risk Indicators
Health Maintenance
Clinical Guidelines History
Status
Guideline
due
Colonosc
due
Depressic
due
HIV
due
Influenza
due
Lipid Pan
due
Mammog
due
Occult Bl
due
Pneumoc
Remove Guidelines
Problem List
Enter search term
Search
All Diagnoses
Patient's Diagnoses
Patient's Chronic Diagno
Favorites
My List - Importe
Favorite 2
Favorite 3
Categories
Abnormal Tests/L
Accucheck
Acute Otitis
All FX
Arrhythmias
Arthritis
ASTHMA
Clinical Description and ICD Code
Unspecified essential hypertension | 401.9
Tobacco use disorder | 305.1
Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled | 250.00
3 rows returned
Select
Cancel


Activate Clinical Guidelines
Age: 56
Click Add to include the Diabetes Guidelines.
How to use this template:
Panel Control: Toggle Cycle
Active Guidelines
Condition:
Diagnosis:
Code:
Diabetes
Diabetes mellitus without mention of complication, type II or
250.00
Add
Display only selected guideline
Due within:
Risk Indicators Health Maintenance |
Clinical Guidelines History
Status | Guideline | Last Addressed | Due | Interval | Interval Chng Reason | Start Age | Stop Age | Hold | Resume
due | Colonoscopy | // | 08/12/2014 | 10 years | | 50 years | 75 Years
due | Depression Screening | // | 08/12/2014 | 1 Year | | 12 Years
due | HIV | // | 08/12/2014 | Once | | 15 Years | 65 Years
due | Influenza vaccine | // | 08/12/2014 | 1 Year | | 3 Years
due | Lipid Panel | // | 08/12/2014 | 5 Years | | 20 Years
due | Mammogram | // | 08/12/2014 | 2 Years | | 50 Years | 75 Years
due | Occult Blood, Fecal, IA | // | 08/12/2014 | 1 year | | 50 years | 75 Years
due | Pneumococcal vaccine | // | 08/12/2014 | 2 Months | | 2 Years
Remove Guidelines
Problem List
Save & Close
You could repeat these steps to add the Hypertension Guidelines as well.

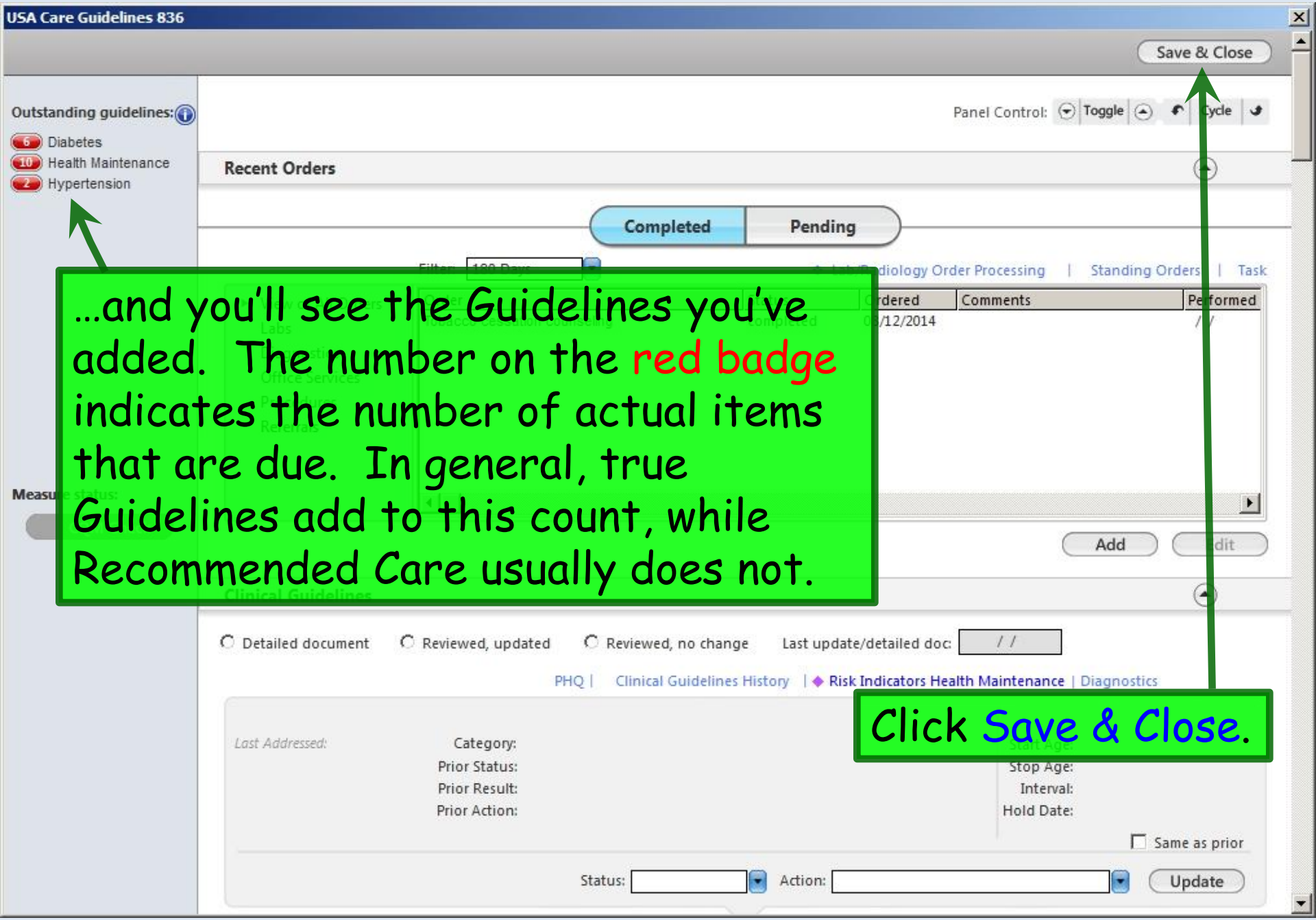

Activate Clinical Guidelines
All our Guidelines are added, with several flagged as due.
Active Guidelines
Condition:
Diagnosis:
Code:
Add
Display only selected guideline
Due within:
Risk Indicators Health Maintenance |
Clinical Guidelines History
Status | Guideline | Last Addressed | Due | Interval | Interval Chng Reason | Start Age | Stop Age | Hold | Resume
due | BMP | // | 08/12/2014 | 1 Year
due | Colonoscopy | // | 08/12/2014 | 10 years | | 50 years | 75 Years
Consider antiplatelet drugs | // | 08/12/2014
Consider statin | // | 08/12/2014
due | Depression Screening | // | 08/12/2014 | 1 Year | | 12 Years
due | Dilated eye exam | // | 08/12/2014 | 1 Year
First line meds--thiazides, ACEI/ARB, CCB | // | 08/12/2014
Remove Guidelines
(Select a condition and click Remove to remove all associated guidelines)
Delete the selected guideline
Condition
Diabetes
Note the item Consider statin. This is an example of Recommended Care.
Save & Close


Activate Clinical Guid
Age: 56 Years
How to use this template:
Cycle
You can return to the Risk Indicators Health Maintenance popup if you need to update the Health Maintenance Modifiers.
Active Guidelines
Condition:
Diagnosis:
Code:
Add
Display only selected guideline
Due within:
Risk Indicators Health Maintenance |
Clinical Guidelines History
Status
Guideline
Last Addressed
Due
Interval
Interval Chng Reason
Start Age
Stop Age
Hold
Resume
due
BMP
due
Colonoscopy
Consider antiplatelet drugs
Consider statin
due
Depression Screening
due
Dilated eye exam
First line meds--thiazides,
CCB
You also have the opportunity to remove Guidelines; this would most often be used if you added the wrong one by accident.
Remove Guidelines
(Select a condition and click remove to remove all associated guidelines)
Condition
Diabetes
Health Maintenance
Remove
Delete the selected guideline
Remove
Only the most recent record of a guideline may be removed.
Problem List
For now though, just click Save & Close.
Save & Close

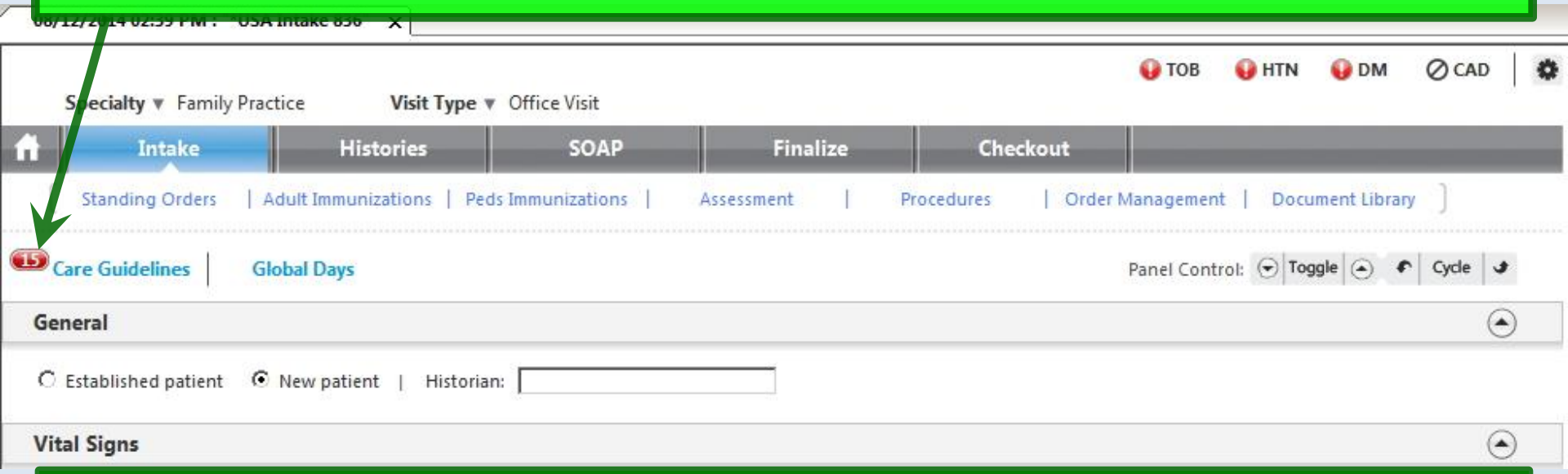


Back on the **Care Guidelines popup**, you see a summary of all the Guidelines & Recommended Care that have been added. Since nothing has been done yet, everything is listed as due today.

Navigate up to the top of the popup...


USA Care Guidelines 836
Save & Close
Outstanding guidelines:
6 Diabetes
10 Health Maintenance
2 Hypertension
Panel Control: Toggle Cycle
Recent Orders
Completed
Pending
Standing Orders
Task
Ordered
Comments
Performed
08/12/2014
Add
Detailed document
Reviewed, updated
Reviewed, no change
Last update/detailed doc:
PHQ
Clinical Guidelines History
Risk Indicators Health Maintenance
Diagnostics
Last Addressed:
Category:
Prior Status:
Prior Result:
Prior Action:
Stop Age:
Interval:
Hold Date:
Same as prior
Status:
Action:
Update
…and you'll see the Guidelines you've added. The number on the red badge indicates the number of actual items that are due. In general, true Guidelines add to this count, while Recommended Care usually does not.
Click Save & Close.

You return to the tabbed workflow (the **Intake tab** in this example). The badge also shows here, indicating 15 items are due.

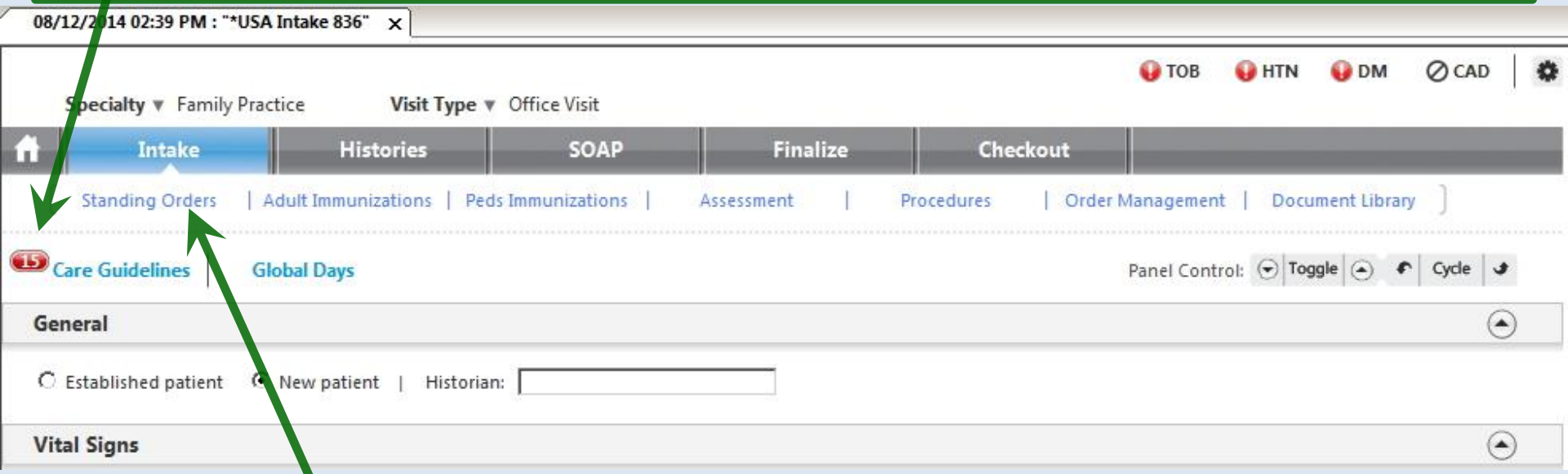


Why doesn't the badge say 18—the sum of the items on the previous popup? If a test appears on more than one Guideline, it only counts it once here. And it only looks at the one that is due soonest. E.G., the Diabetes Guidelines call for a microalbumin every year, while the Hypertension Guidelines call for one every 3 years. NextGen combines those into a microalbumin every year.

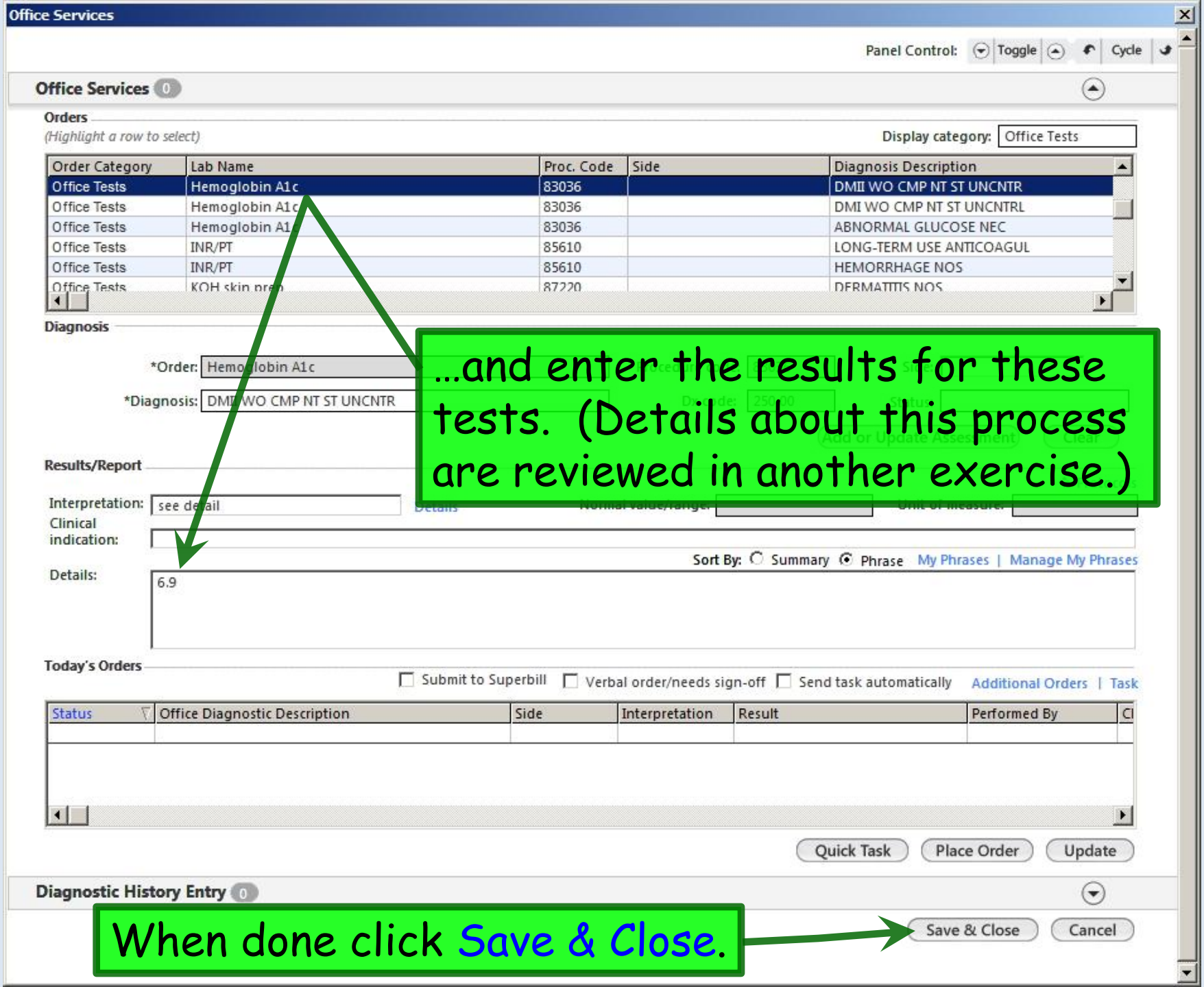
Using Guidelines

Once you have Guidelines activated, during an encounter they serve as prompts for all of the routine things that should be semi-automatic, so you don't have to remember them, then hunt & peck all through the chart to figure out what is due.

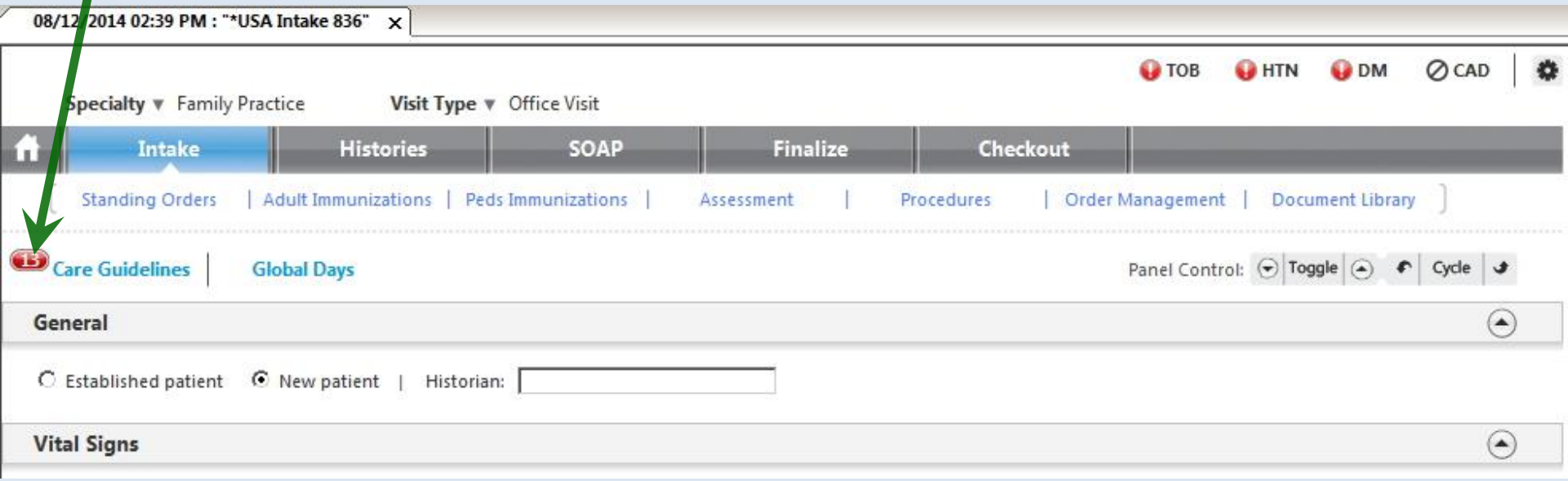
You can see at a glance at the top of each template that there are Guidelines due. And, as illustrated above, you could open the Care Guidelines popup & see what they are.



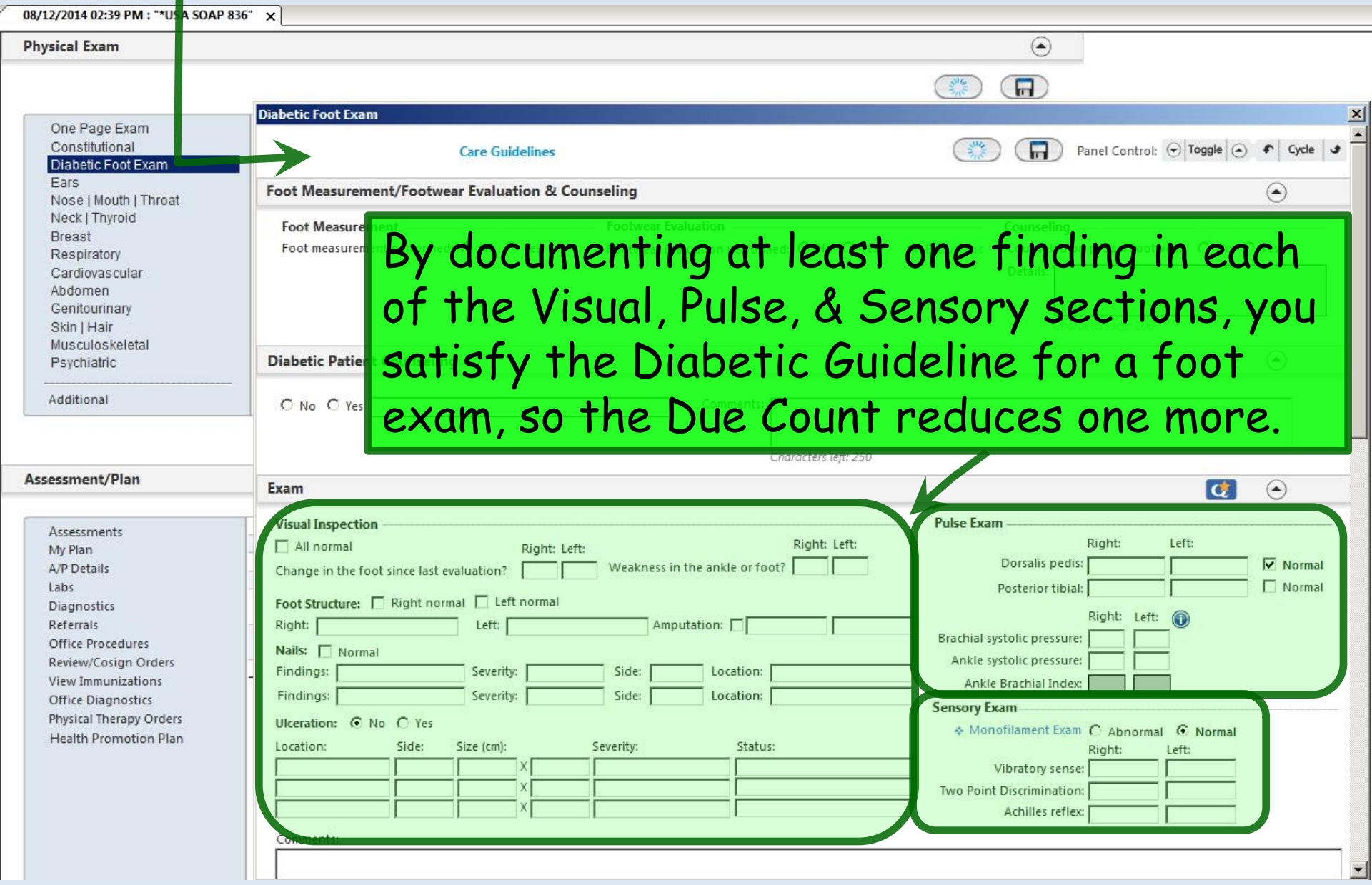
But your routine workflow may take care of some of these things. E.G., your clinic may have standing orders for diabetics to have a sugar at all visits, a HbA1c every 3 months, & a microalbumin every year. While rooming the patient, the nurse would click Standing Orders…


Office Services
Panel Control: Toggle Cycle
Office Services 0
Orders
(Highlight a row to select)
Display category: Office Tests
Order Category | Lab Name | Proc. Code | Side | Diagnosis Description
Office Tests | Hemoglobin A1c | 83036 | | DMII WO CMP NT ST UNCNTR
Office Tests | Hemoglobin A1c | 83036 | | DMI WO CMP NT ST UNCNTRL
Office Tests | Hemoglobin A1 | 83036 | | ABNORMAL GLUCOSE NEC
Office Tests | INR/PT | 85610 | | LONG-TERM USE ANTICOAGUL
Office Tests | INR/PT | 85610 | | HEMORRHAGE NOS
Office Tests | KOH skin prep | 87220 | | DERMATITIS NOS
Diagnosis
*Order: Hemoglobin A1c
*Diagnosis: DMII WO CMP NT ST UNCNTR
...and enter the results for these tests. (Details about this process are reviewed in another exercise.)
Results/Report
Interpretation: see detail
Clinical indication:
Sort By: Summary Phrase My Phrases | Manage My Phrases
Details: 6.9
Today's Orders
Submit to Superbill Verbal order/needs sign-off Send task automatically Additional Orders | Task
Status | Office Diagnostic Description | Side | Interpretation | Result | Performed By
Quick Task Place Order Update
Diagnostic History Entry 0
When done click Save & Close.
Save & Close Cancel

Since HbA1c & microalbumin are among the Guidelines, & you've just satisfied those requirements, the due count reduces by 2.

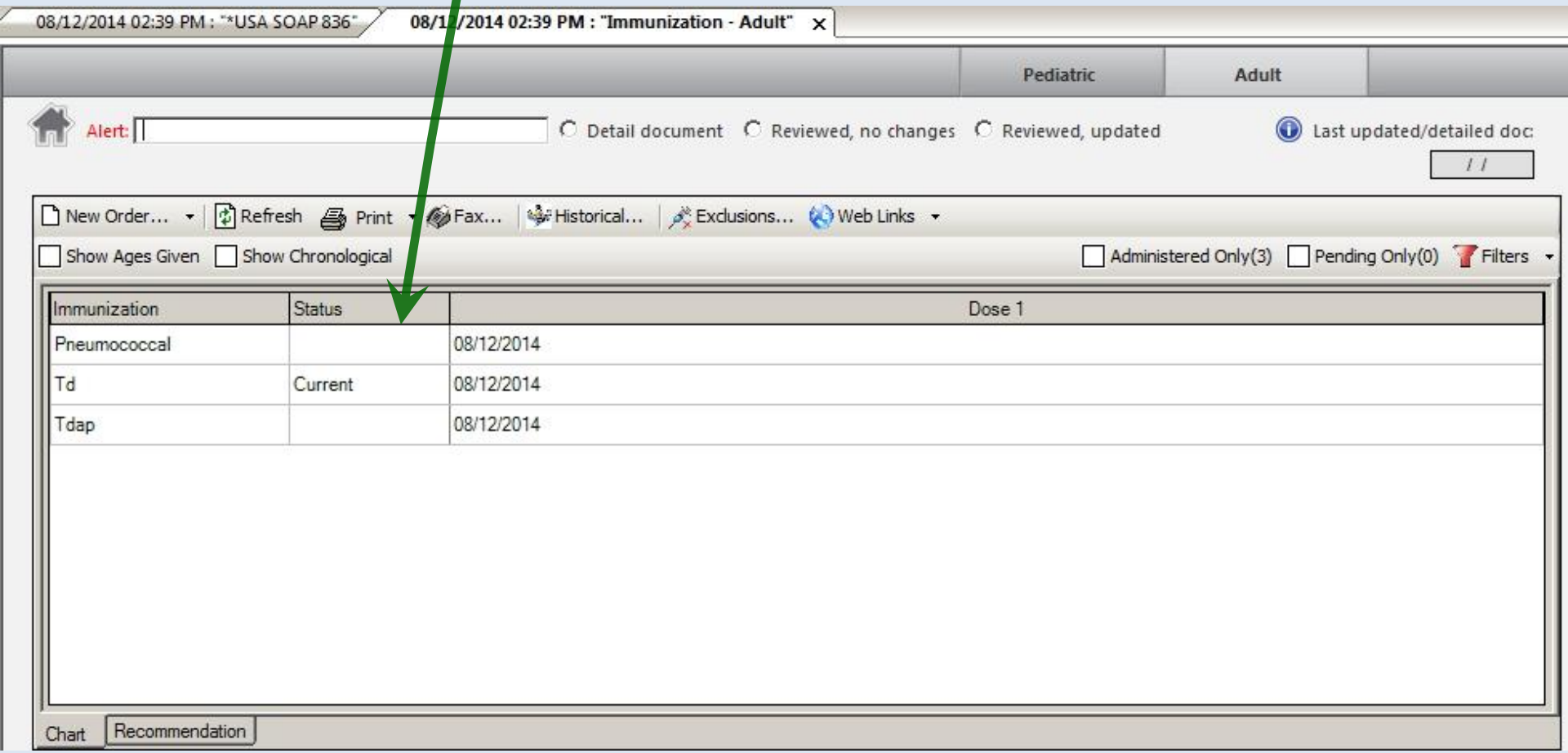


Later in the visit the provider does a physical exam, including a diabetic foot exam.



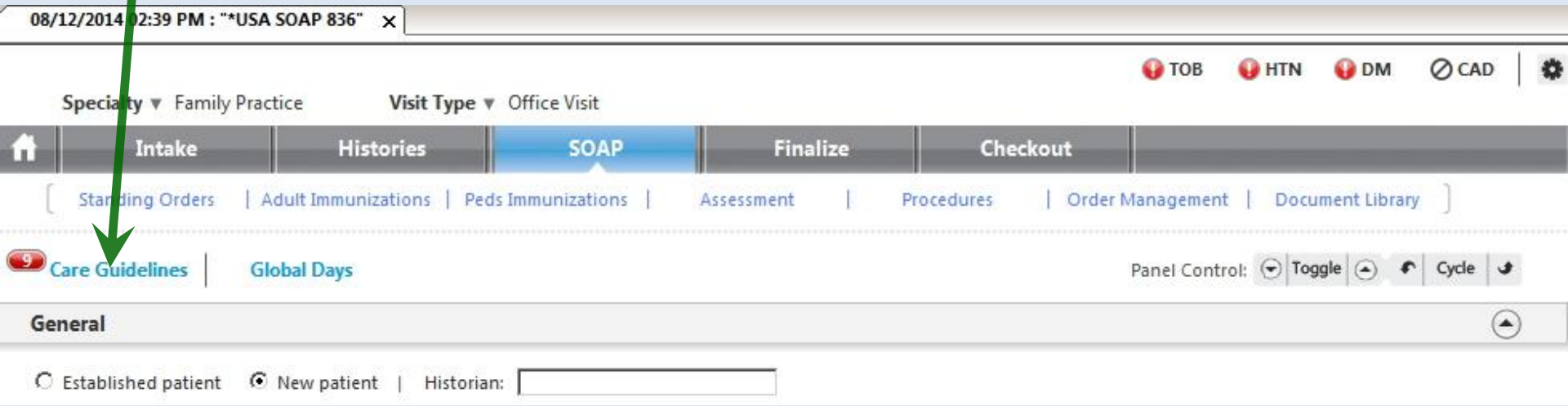
By documenting at least one finding in each of the Visual, Pulse, & Sensory sections, you satisfy the Diabetic Guideline for a foot exam, so the Due Count reduces one more.

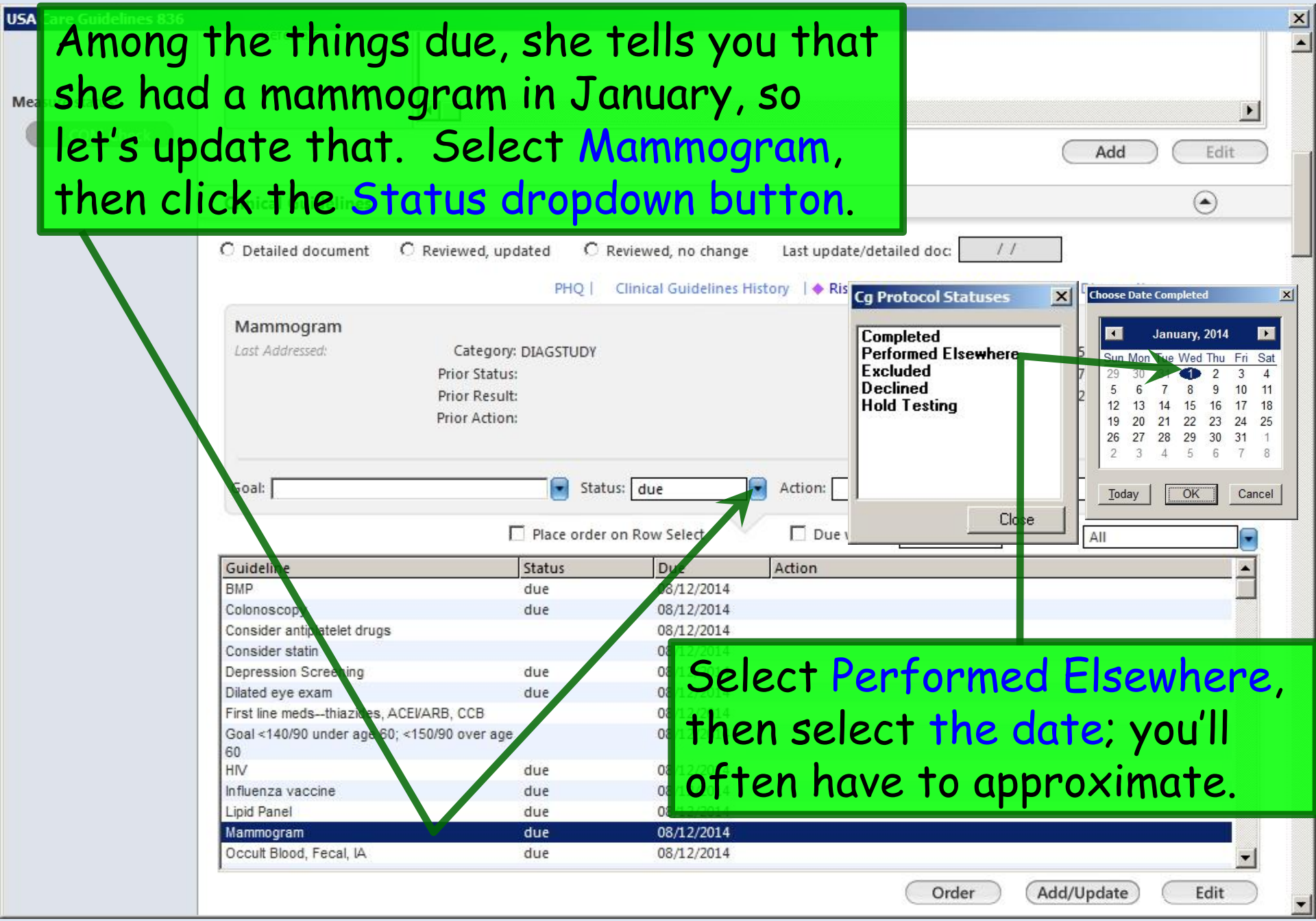
In the course of the visit the nurse gives Tdap & Prevnar, & the Due count drops a couple more.

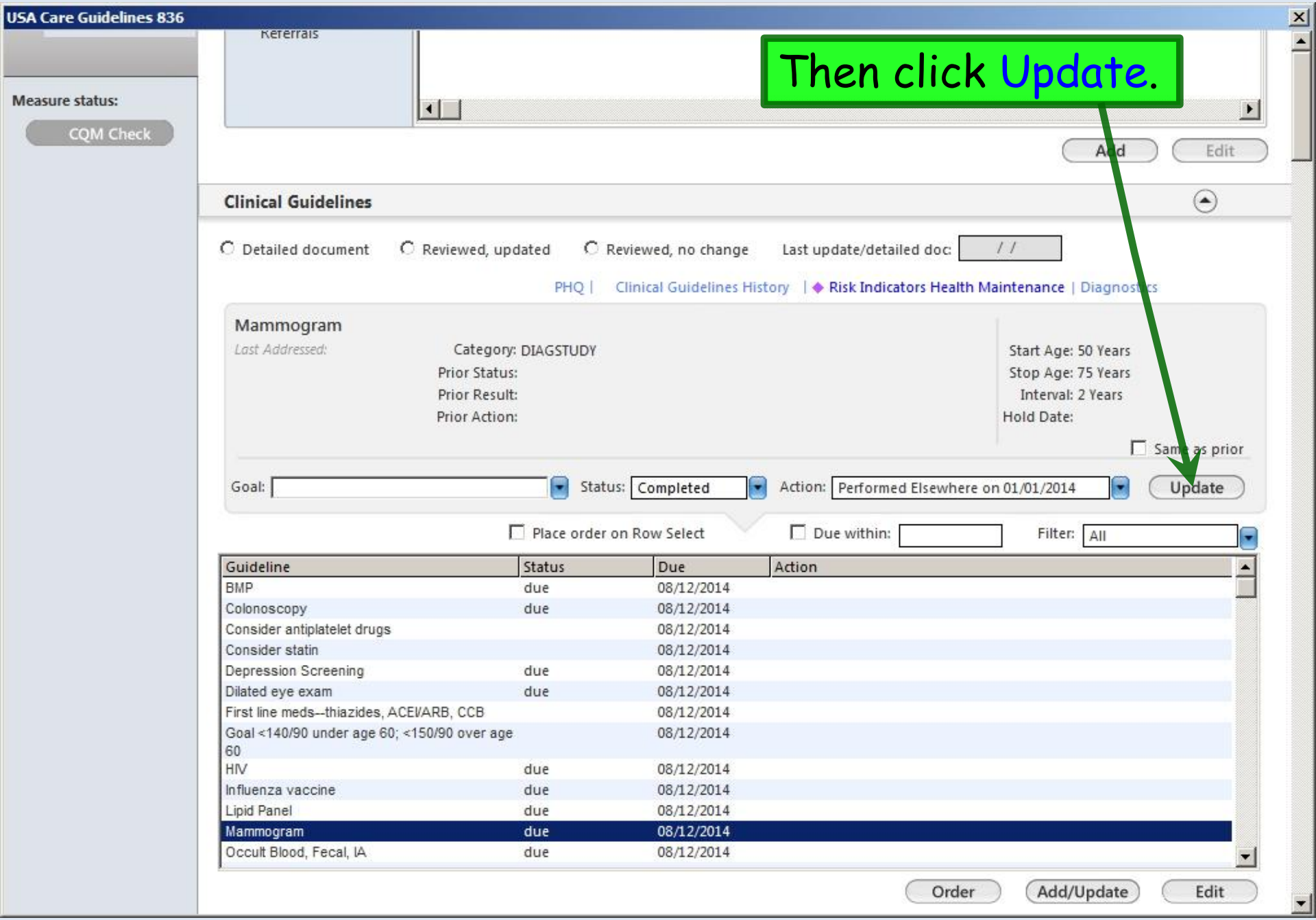


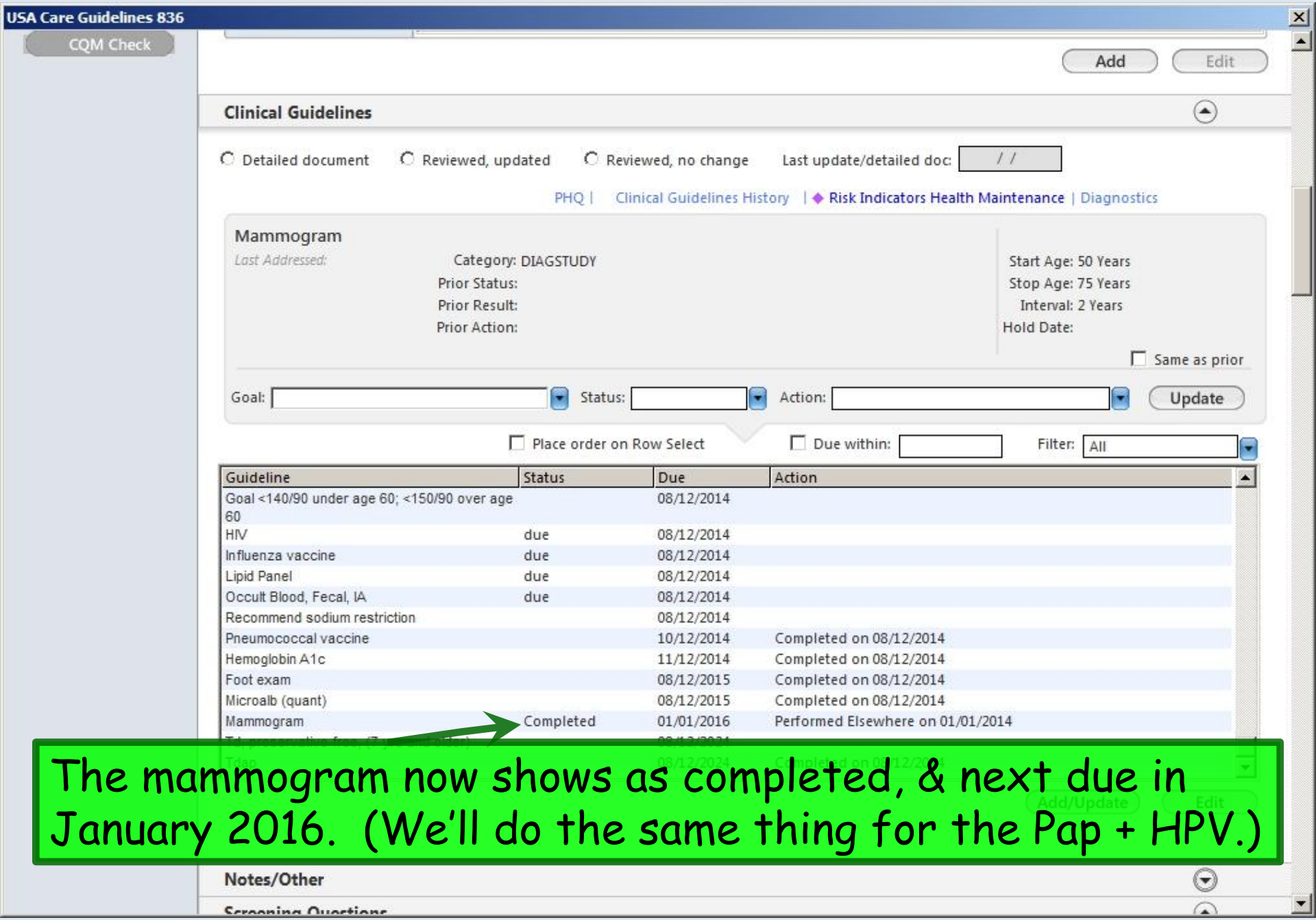
(If it was during flu season, we'd give that vaccine as well.)

Now let's look at Care Guidelines to see where we stand.

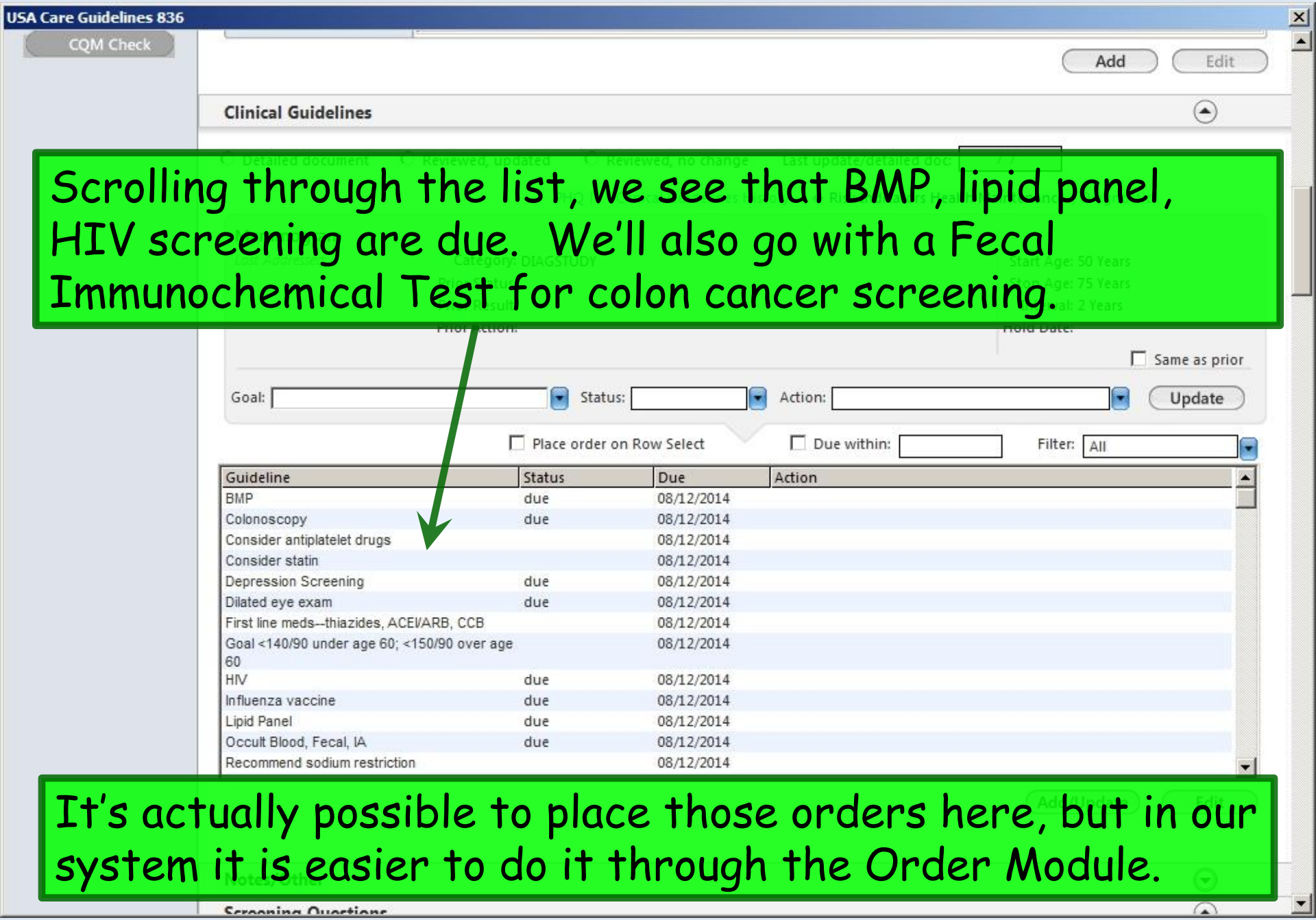


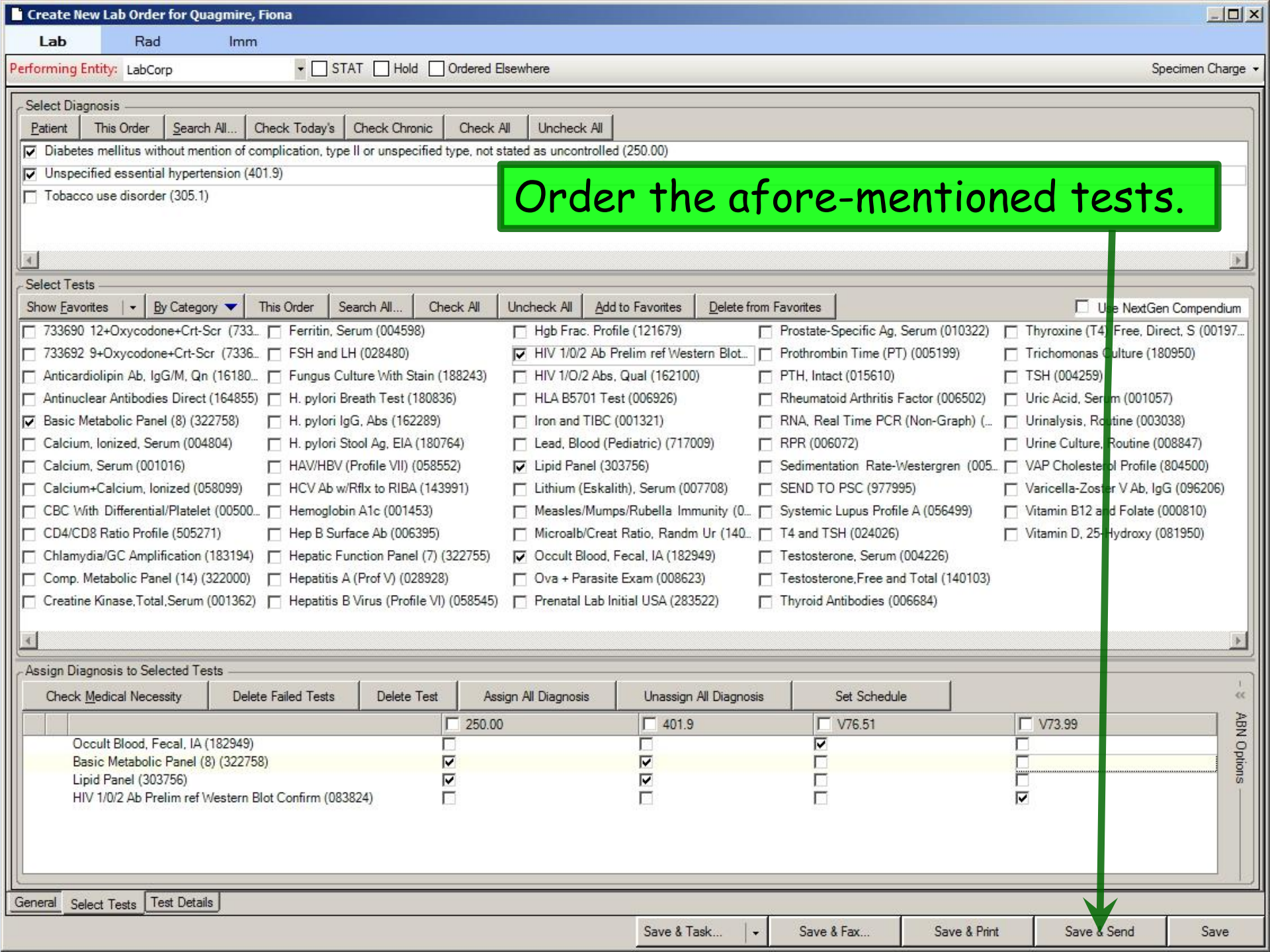

Among the things due, she tells you that she had a mammogram in January, so let's update that. Select Mammogram, then click the Status dropdown button.
Add
Edit
Detailed document
Reviewed, updated
Reviewed, no change
Last update/detailed doc:
PHQ |
Clinical Guidelines History
Mammogram
Last Addressed:
Category: DIAGSTUDY
Prior Status:
Prior Result:
Prior Action:
Goal:
Status: due
Action:
Place order on Row Select
Due
Cg Protocol Statuses
Completed
Performed Elsewhere
Excluded
Declined
Hold Testing
Close
Choose Date Completed
January, 2014
Sun Mon Tue Wed Thu Fri Sat
Today
OK
Cancel
All
Guideline
Status
Due
Action
BMP due 08/12/2014
Colonoscopy due 08/12/2014
Consider antiplatelet drugs 08/12/2014
Consider statin
Depression Screening due
Dilated eye exam due
First line meds--thiazides, ACEI/ARB, CCB
Goal <140/90 under age 60; <150/90 over age 60
HIV due
Influenza vaccine due
Lipid Panel due
Mammogram due 08/12/2014
Occult Blood, Fecal, IA due 08/12/2014
Order
Add/Update
Edit
Select Performed Elsewhere, then select the date; you'll often have to approximate.

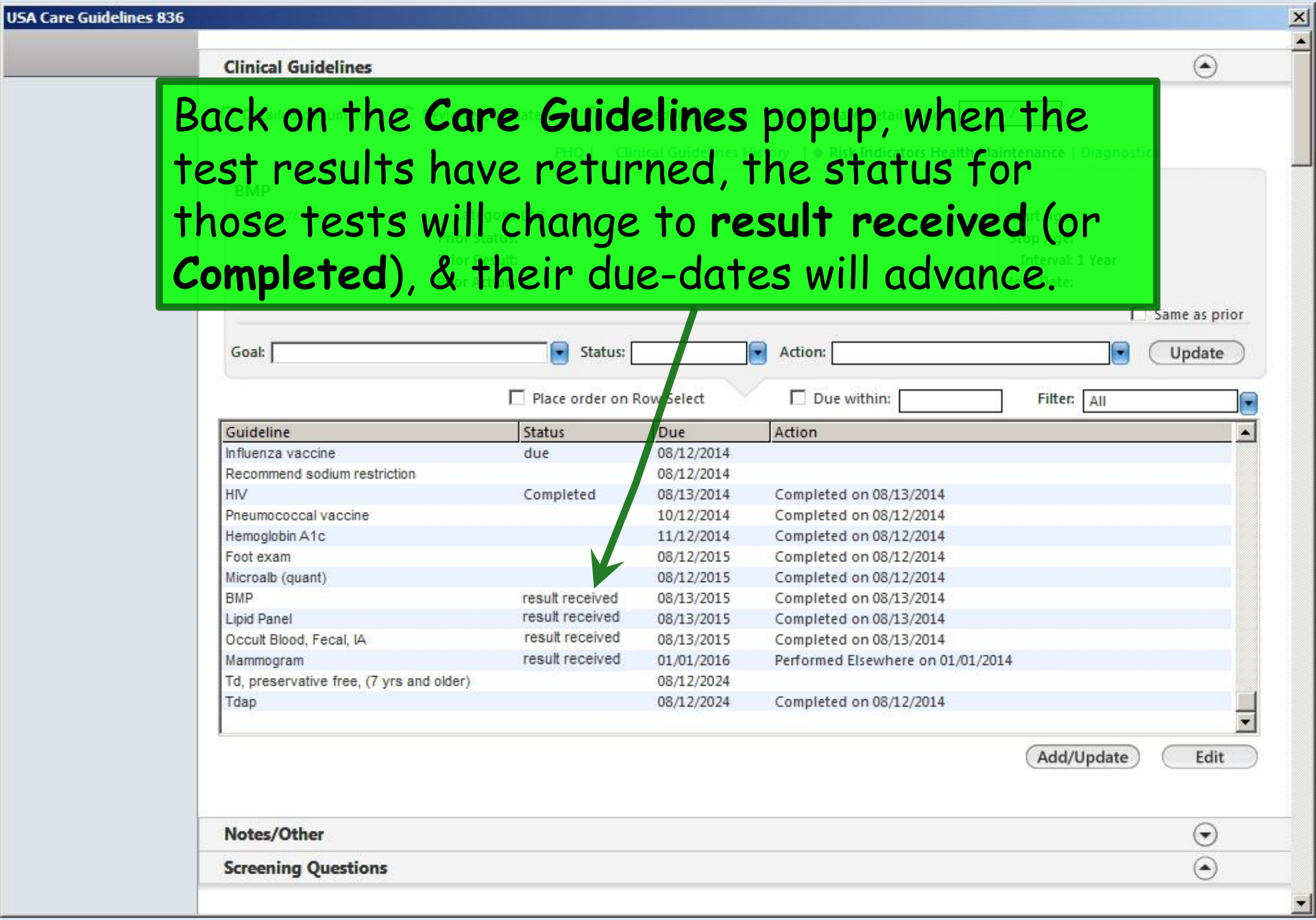

USA Care Guidelines 836
Measure status:
CQM Check
Referrals
Then click Update.
Add
Edit
Clinical Guidelines
Detailed document
Reviewed, updated
Reviewed, no change
Last update/detailed doc:
/ /
PHQ |
Clinical Guidelines History
| Risk Indicators Health Maintenance | Diagnostics
Mammogram
Last Addressed:
Category: DIAGSTUDY
Prior Status:
Prior Result:
Prior Action:
Start Age: 50 Years
Stop Age: 75 Years
Interval: 2 Years
Hold Date:
Same as prior
Goal:
Status: Completed
Action: Performed Elsewhere on 01/01/2014
Update
Place order on Row Select
Due within:
Filter: All
Guideline | Status | Due | Action
BMP | due | 08/12/2014
Colonoscopy | due | 08/12/2014
Consider antiplatelet drugs | | 08/12/2014
Consider statin | | 08/12/2014
Depression Screening | due | 08/12/2014
Dilated eye exam | due | 08/12/2014
First line meds--thiazides, ACEI/ARB, CCB | | 08/12/2014
Goal <140/90 under age 60; <150/90 over age 60 | | 08/12/2014
HIV | due | 08/12/2014
Influenza vaccine | due | 08/12/2014
Lipid Panel | due | 08/12/2014
Mammogram | due | 08/12/2014
Occult Blood, Fecal, IA | due | 08/12/2014
Order
Add/Update
Edit



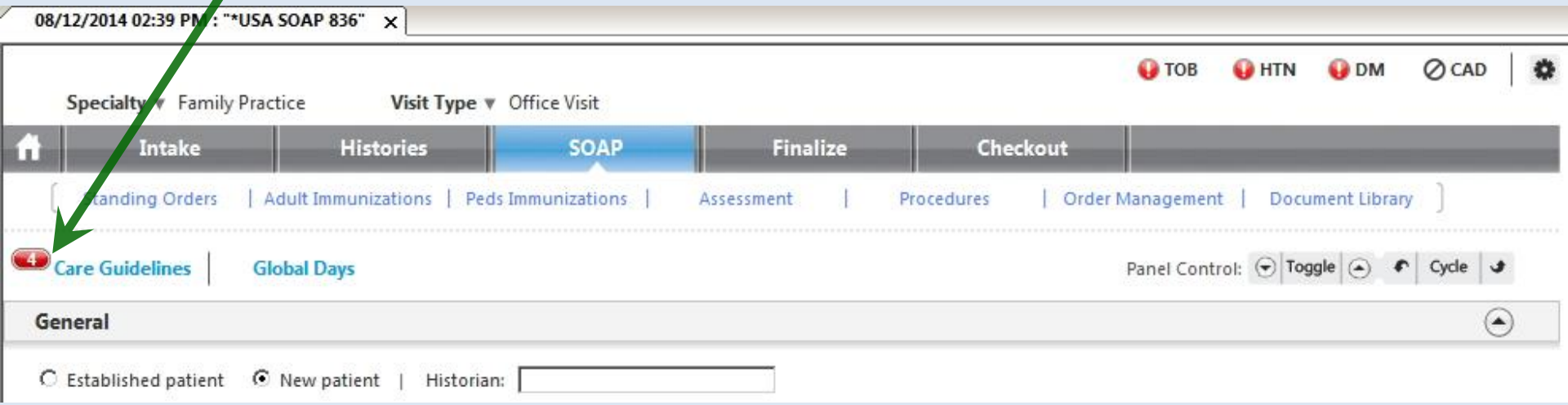
The mammogram now shows as completed, & next due in January 2016. (We'll do the same thing for the Pap + HPV.)

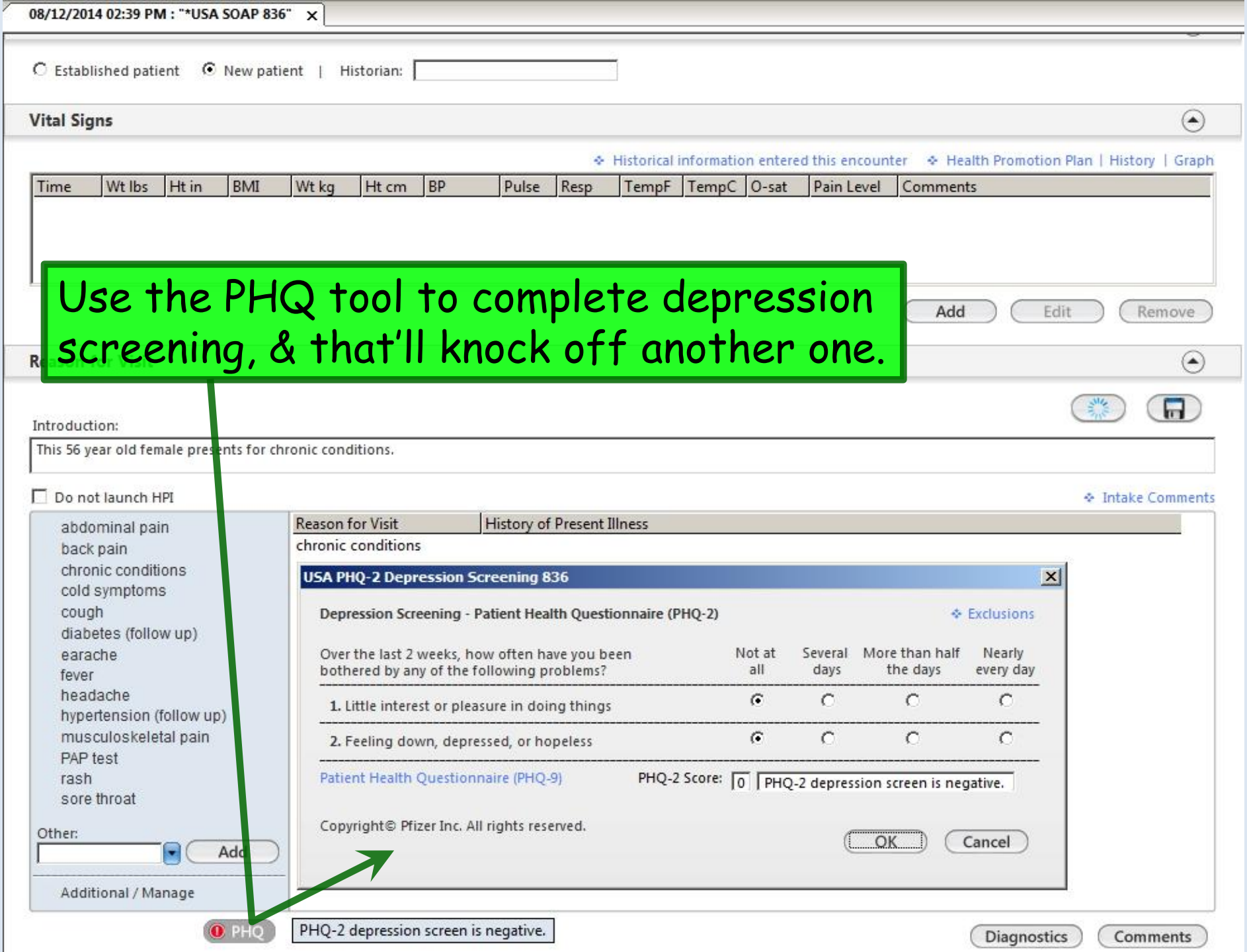

USA Care Guidelines 836
CQM Check
Add
Edit
Clinical Guidelines
Scrolling through the list, we see that BMP, lipid panel, HIV screening are due. We'll also go with a Fecal Immunochemical Test for colon cancer screening.
Same as prior
Goal:
Status:
Action:
Update
Place order on Row Select
Due within:
Filter:
All
Guideline | Status | Due | Action
BMP | due | 08/12/2014
Colonoscopy | due | 08/12/2014
Consider antiplatelet drugs | | 08/12/2014
Consider statin | | 08/12/2014
Depression Screening | due | 08/12/2014
Dilated eye exam | due | 08/12/2014
First line meds--thiazides, ACEI/ARB, CCB | | 08/12/2014
Goal <140/90 under age 60; <150/90 over age 60 | | 08/12/2014
HIV | due | 08/12/2014
Influenza vaccine | due | 08/12/2014
Lipid Panel | due | 08/12/2014
Occult Blood, Fecal, IA | due | 08/12/2014
Recommend sodium restriction | | 08/12/2014
It's actually possible to place those orders here, but in our system it is easier to do it through the Order Module.


Create New Lab Order for Quagmire, Fiona
Lab
Rad
Imm
Performing Entity: LabCorp
STAT
Hold
Ordered Elsewhere
Specimen Charge
Select Diagnosis
Patient
This Order
Search All...
Check Today's
Check Chronic
Check All
Uncheck All
Diabetes mellitus without mention of complication, type II or unspecified type, not stated as uncontrolled (250.00)
Unspecified essential hypertension (401.9)
Tobacco use disorder (305.1)
Order the afore-mentioned tests.
Select Tests
Show Favorites
By Category
This Order
Search All...
Check All
Uncheck All
Add to Favorites
Delete from Favorites
Use NextGen Compendium
733690 12+Oxycodone+Crt-Scr (733..
733692 9+Oxycodone+Crt-Scr (7336..
Anticardiolipin Ab, IgG/M, Qn (16180..
Antinuclear Antibodies Direct (164855)
Basic Metabolic Panel (8) (322758)
Calcium, Ionized, Serum (004804)
Calcium, Serum (001016)
Calcium+Calcium, Ionized (058099)
CBC With Differential/Platelet (00500..
CD4/CD8 Ratio Profile (505271)
Chlamydia/GC Amplification (183194)
Comp. Metabolic Panel (14) (322000)
Creatine Kinase,Total,Serum (001362)
Ferritin, Serum (004598)
FSH and LH (028480)
Fungus Culture With Stain (188243)
H. pylori Breath Test (180836)
H. pylori IgG, Abs (162289)
H. pylori Stool Ag, EIA (180764)
HAV/HBV (Profile VII) (058552)
HCV Ab w/Rflx to RIBA (143991)
Hemoglobin A1c (001453)
Hep B Surface Ab (006395)
Hepatic Function Panel (7) (322755)
Hepatitis A (Prof V) (028928)
Hepatitis B Virus (Profile VI) (058545)
Hgb Frac. Profile (121679)
HIV 1/0/2 Ab Prelim ref Western Blot..
HIV 1/O/2 Abs, Qual (162100)
HLA B5701 Test (006926)
Iron and TIBC (001321)
Lead, Blood (Pediatric) (717009)
Lipid Panel (303756)
Lithium (Eskalith), Serum (007708)
Measles/Mumps/Rubella Immunity (0..
Microalb/Creat Ratio, Randm Ur (140..
Occult Blood, Fecal, IA (182949)
Ova + Parasite Exam (008623)
Prenatal Lab Initial USA (283522)
Prostate-Specific Ag, Serum (010322)
Prothrombin Time (PT) (005199)
PTH, Intact (015610)
Rheumatoid Arthritis Factor (006502)
RNA, Real Time PCR (Non-Graph) (...
RPR (006072)
Sedimentation Rate-Westergren (005..
SEND TO PSC (977995)
Systemic Lupus Profile A (056499)
T4 and TSH (024026)
Testosterone, Serum (004226)
Testosterone,Free and Total (140103)
Thyroid Antibodies (006684)
Thyroxine (T4), Free, Direct, S (00197..
Trichomonas Culture (180950)
TSH (004259)
Uric Acid, Serum (001057)
Urinalysis, Routine (003038)
Urine Culture, Routine (008847)
VAP Cholesterol Profile (804500)
Varicella-Zoster V Ab, IgG (096206)
Vitamin B12 and Folate (000810)
Vitamin D, 25-Hydroxy (081950)
Assign Diagnosis to Selected Tests
Check Medical Necessity
Delete Failed Tests
Delete Test
Assign All Diagnosis
Unassign All Diagnosis
Set Schedule
250.00
401.9
V76.51
V73.99
Occult Blood, Fecal, IA (182949)
Basic Metabolic Panel (8) (322758)
Lipid Panel (303756)
HIV 1/0/2 Ab Prelim ref Western Blot Confirm (083824)
ABN Options
General
Select Tests
Test Details
Save & Task...
Save & Fax...
Save & Print
Save & Send
Save


USA Care Guidelines 836
Clinical Guidelines
Back on the **Care Guidelines** popup, when the test results have returned, the status for those tests will change to **result received** (or **Completed**), & their due-dates will advance.
Same as prior
Goal:
Status:
Action:
Update
Place order on Row Select
Due within:
Filter: All
Guideline | Status | Due | Action
Influenza vaccine | due | 08/12/2014 |
Recommend sodium restriction | | 08/12/2014 |
HIV | Completed | 08/13/2014 | Completed on 08/13/2014
Pneumococcal vaccine | | 10/12/2014 | Completed on 08/12/2014
Hemoglobin A1c | | 11/12/2014 | Completed on 08/12/2014
Foot exam | | 08/12/2015 | Completed on 08/12/2014
Microalb (quant) | | 08/12/2015 | Completed on 08/12/2014
BMP | result received | 08/13/2015 | Completed on 08/13/2014
Lipid Panel | result received | 08/13/2015 | Completed on 08/13/2014
Occult Blood, Fecal, IA | result received | 08/13/2015 | Completed on 08/13/2014
Mammogram | result received | 01/01/2016 | Performed Elsewhere on 01/01/2014
Td, preservative free, (7 yrs and older) | | 08/12/2024 |
Tdap | | 08/12/2024 | Completed on 08/12/2014
Add/Update
Edit
Notes/Other
Screening Questions

Back on the tabbed workflow, the badge count has now dropped further.

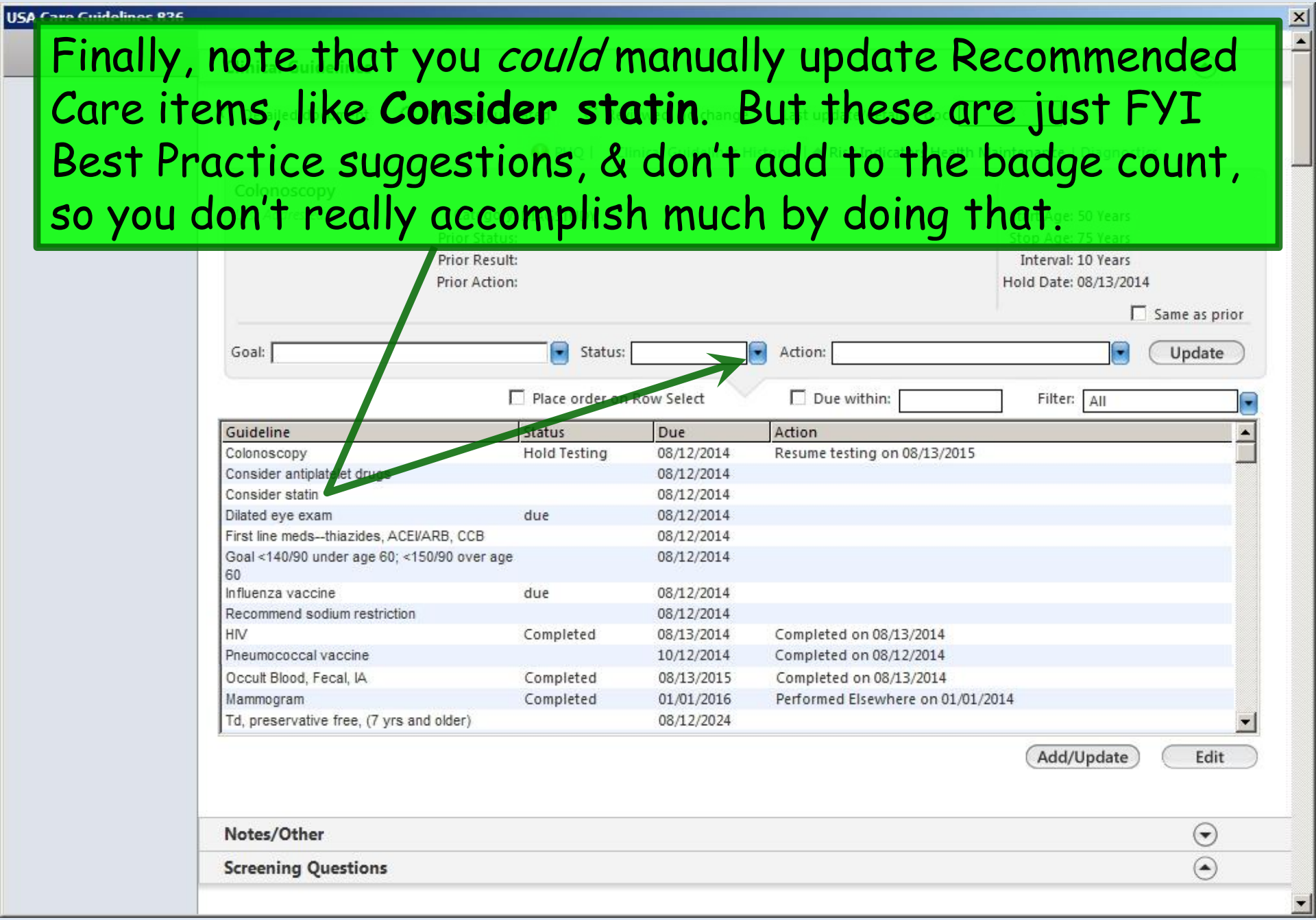



08/12/2014 02:39 PM : "*USA SOAP 836"
Established patient
New patient
Historian:
Vital Signs
Historical information entered this encounter
Health Promotion Plan | History | Graph
Time
Wt lbs
Ht in
BMI
Wt kg
Ht cm
BP
Pulse
Resp
TempF
TempC
O-sat
Pain Level
Comments
Add
Edit
Remove
Use the PHQ tool to complete depression screening, & that'll knock off another one.
Introduction:
This 56 year old female presents for chronic conditions.
Do not launch HPI
Intake Comments
abdominal pain
back pain
chronic conditions
cold symptoms
cough
diabetes (follow up)
earache
fever
headache
hypertension (follow up)
musculoskeletal pain
PAP test
rash
sore throat
Other:
Additional / Manage
Reason for Visit
History of Present Illness
chronic conditions
USA PHQ-2 Depression Screening 836
Depression Screening - Patient Health Questionnaire (PHQ-2)
Exclusions
Over the last 2 weeks, how often have you been bothered by any of the following problems?
Not at all
Several days
More than half the days
Nearly every day
1. Little interest or pleasure in doing things
2. Feeling down, depressed, or hopeless
Patient Health Questionnaire (PHQ-9)
PHQ-2 Score:
0
PHQ-2 depression screen is negative.
Copyright© Pfizer Inc. All rights reserved.
OK
Cancel
PHQ
PHQ-2 depression screen is negative.
Diagnostics
Comments

Work through everything else in a similar fashion. While it seems like a lot in this example, once everything is addressed for the first time, items will just come up a few at a time throughout the year as they become due again.

Here are some tips you'll need to know:

1) Lab results, office lab results, vaccines, diabetic foot exams, & depression screening will automatically satisfy Guidelines when they're completed or result is received.
2) For other things, mainly radiographic studies, pap smears, & diabetic eye exams, you'll need to manually enter their completion.
3) You may need to ignore prompts for flu shots if it is not flu season (though the EHR is getting better about that).
4) And sometimes things just don't work perfectly. If necessary, manually update/complete the Guideline.


Finally, note that you *could* manually update Recommended Care items, like **Consider statin**. But these are just FYI Best Practice suggestions, & don't add to the badge count, so you don't really accomplish much by doing that.
Prior Result:
Prior Action:
Interval: 10 Years
Hold Date: 08/13/2014
Same as prior
Goal:
Status:
Action:
Update
Place order on Row Select
Due within:
Filter: All
Guideline | Status | Due | Action
Colonoscopy | Hold Testing | 08/12/2014 | Resume testing on 08/13/2015
Consider antiplatelet drugs | | 08/12/2014 |
Consider statin | | 08/12/2014 |
Dilated eye exam | due | 08/12/2014 |
First line meds--thiazides, ACEI/ARB, CCB | | 08/12/2014 |
Goal <140/90 under age 60; <150/90 over age 60 | | 08/12/2014 |
Influenza vaccine | due | 08/12/2014 |
Recommend sodium restriction | | 08/12/2014 |
HIV | Completed | 08/13/2014 | Completed on 08/13/2014
Pneumococcal vaccine | | 10/12/2014 | Completed on 08/12/2014
Occult Blood, Fecal, IA | Completed | 08/13/2015 | Completed on 08/13/2014
Mammogram | Completed | 01/01/2016 | Performed Elsewhere on 01/01/2014
Td, preservative free, (7 yrs and older) | | 08/12/2024 |
Add/Update
Edit
Notes/Other
Screening Questions

Other Tips

While Guidelines are helpful, they're not perfect, & there are a few technical limitations, glitches, & practical considerations to deal with.

So here are some things that could come in handy to know.

We've added a section on the Care Guidelines popup where you can add notes about things that aren't covered in the established Guidelines. For instance, here we've indicated that we need to repeat CT of the chest 6 months after the last scan.

USA Care Guidelines 836

Goal <140/90 under age 60; <150/90 over age 60		08/12/2014	
Influenza vaccine	du	08/12/2014	
Recommend sodium restriction		08/12/2014	
HIV		08/13/2014	Completed on 08/13/2014
Pneumococcal vaccine		10/12/2014	Completed on 08/12/2014
Hemoglobin A1c		11/12/2014	Completed on 08/12/2014
Foot exam		08/12/2015	Completed on 08/12/2014
Microalb (quant)		08/12/2015	Completed on 08/12/2014
BMP	Completed	08/13/2015	Completed on 08/13/2014

Add/Update Edit

Notes/Other

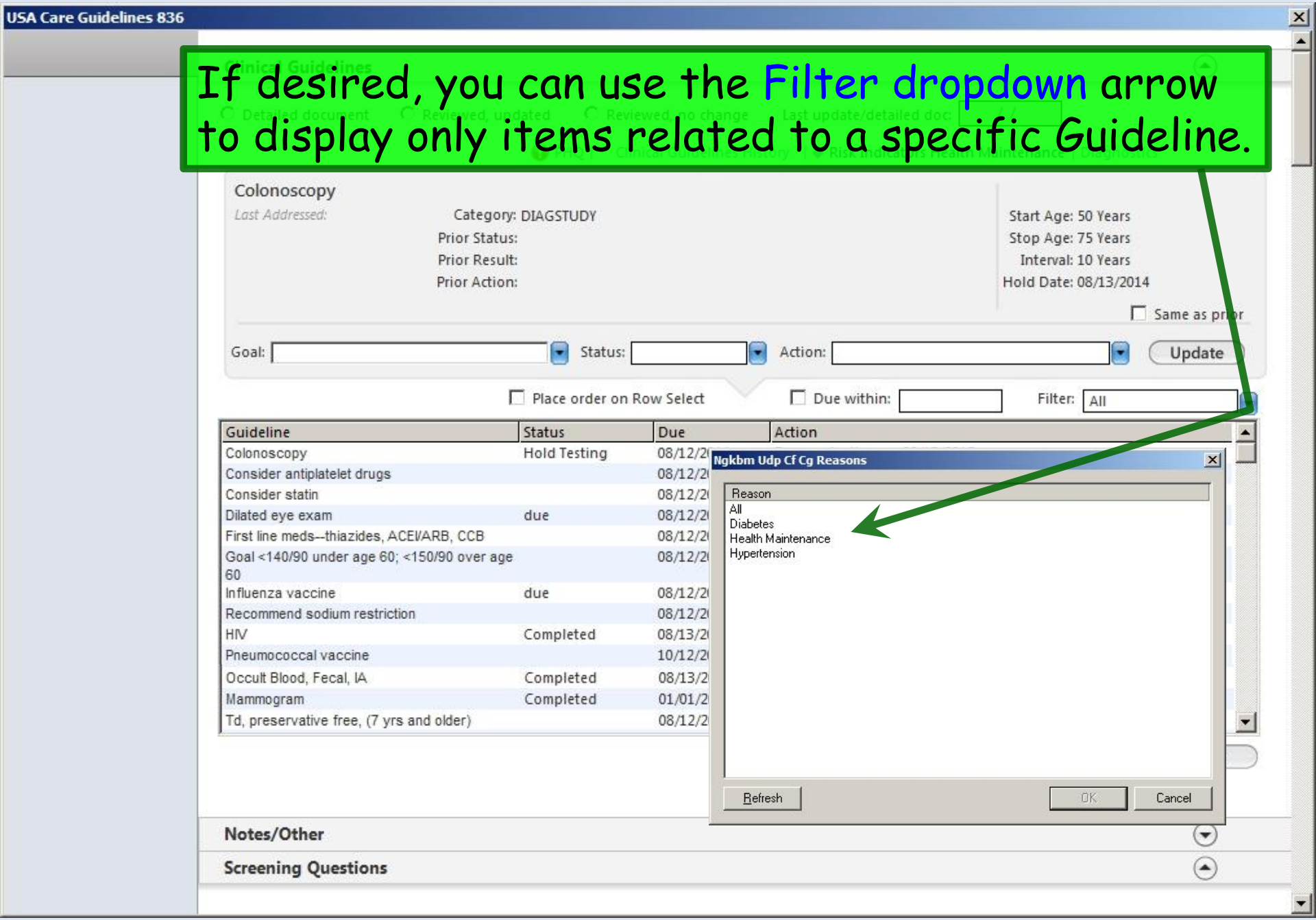
Notes/Reminders/Comments:

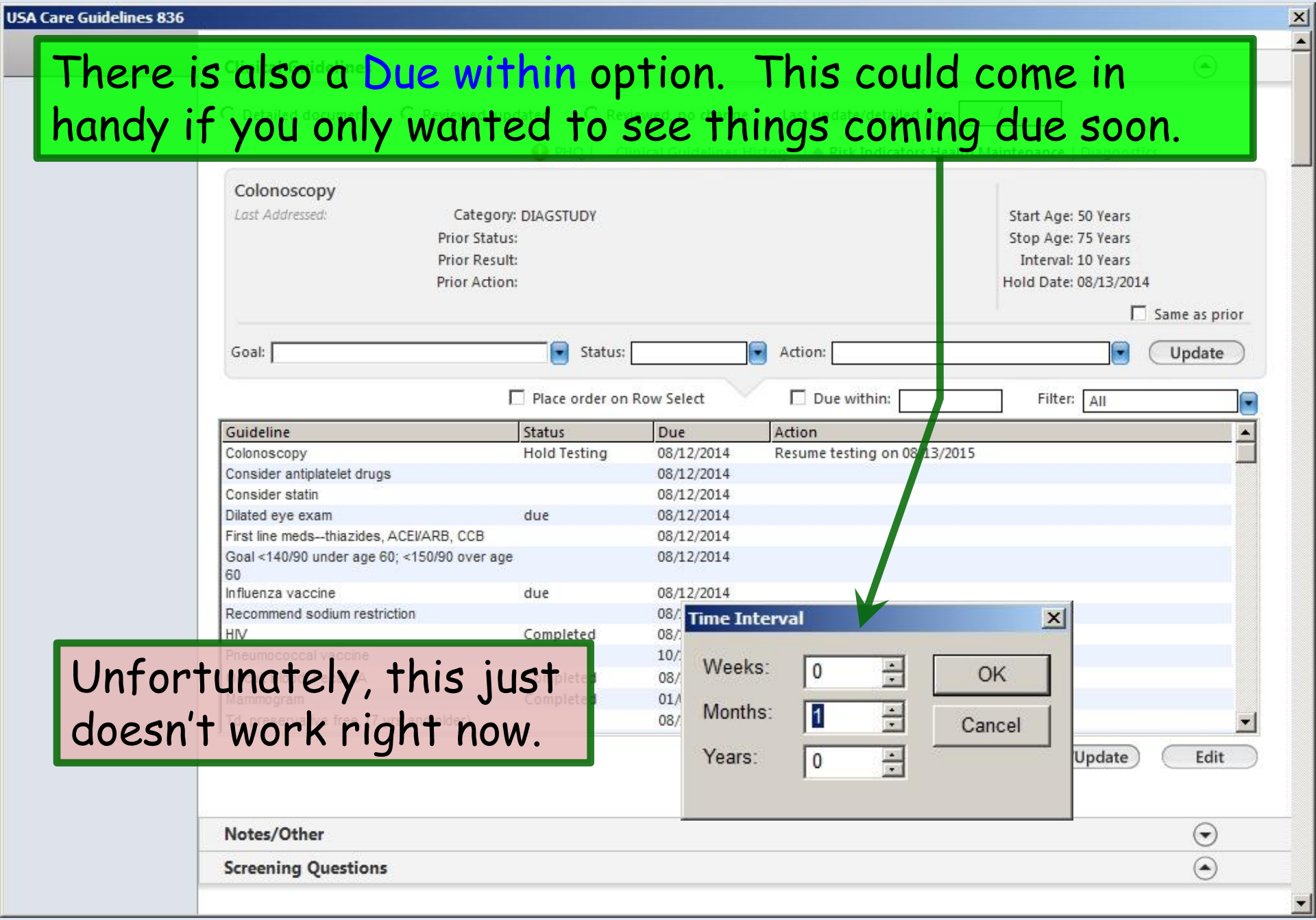
1.5 cm RUL nodule unchanged on CT 5/25/14. Repeat CT ~ 11/25/14.

ACC/AHA ASCVD Risk Estimator **ACC/AHA 10-Year CV Risk (%):** 5.5 **Date Calculated:** 8/12/14

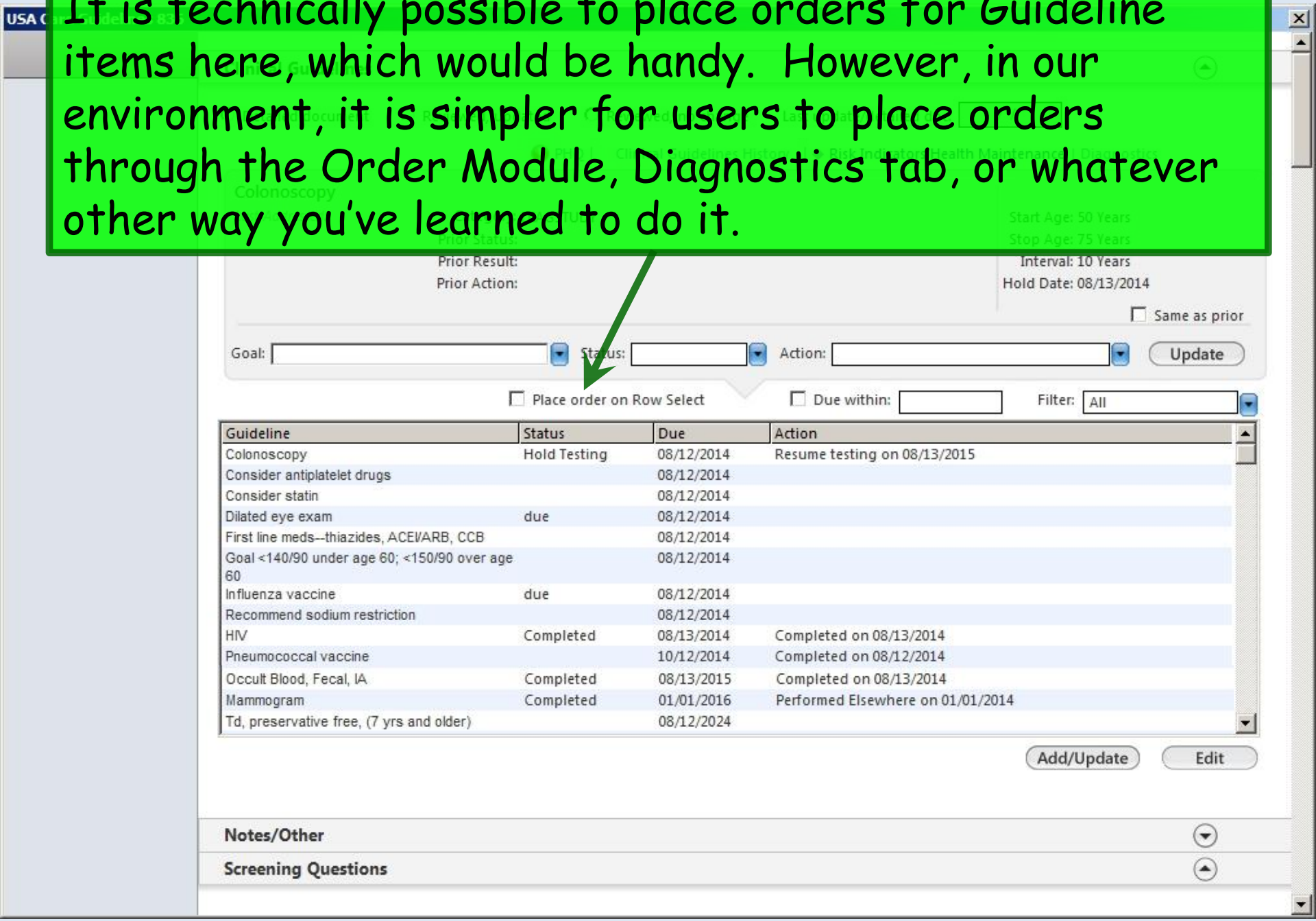
FRAX 10-Year Major Osteoporotic Fx Risk (%): 5.9 **Date Calculated:** 8/12/14 (Compare to average 65 YOWF risk of 9.3%)

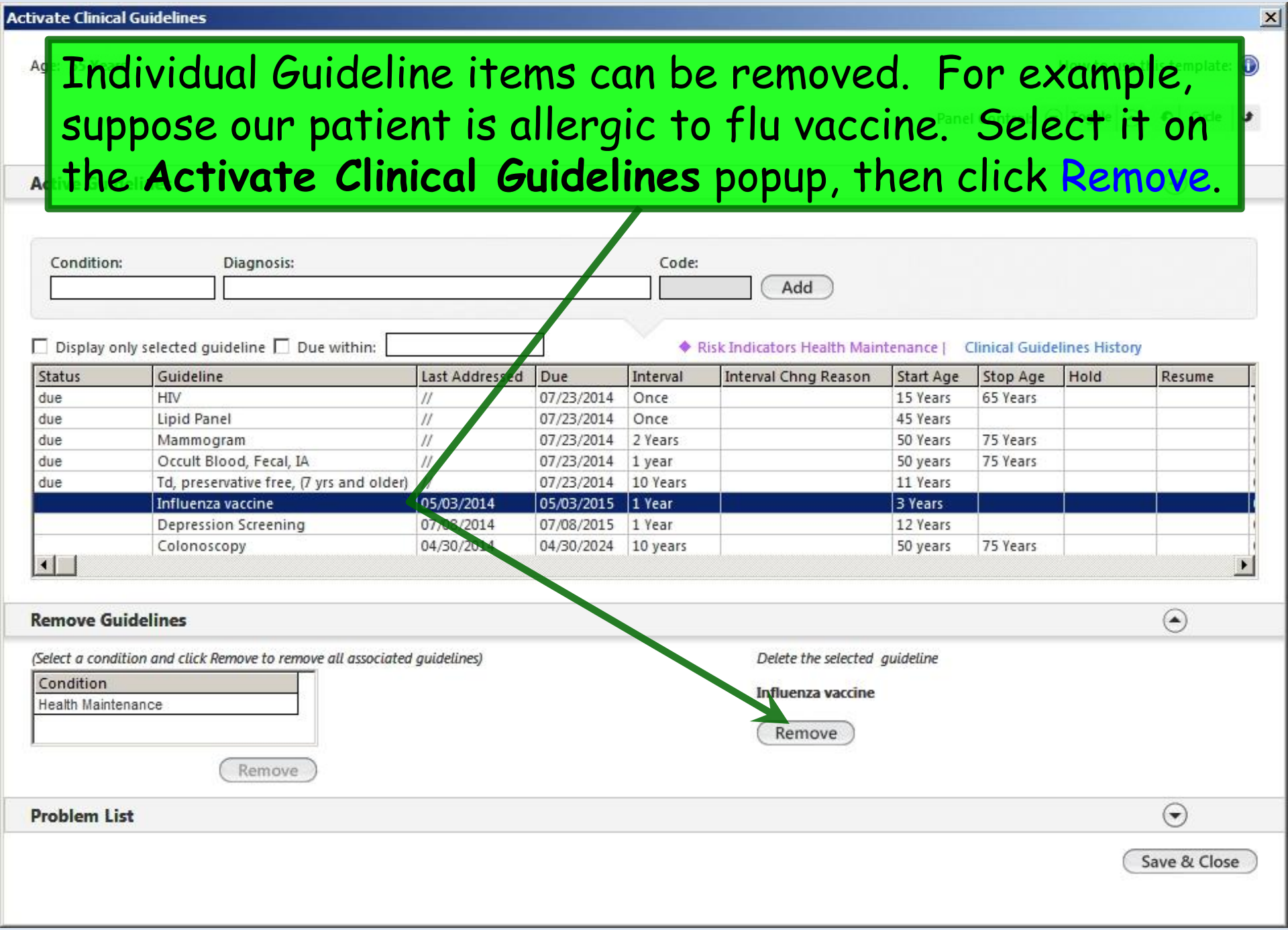
You also have a spot to record cardiac risk & FRAX calculations.


If desired, you can use the Filter dropdown arrow to display only items related to a specific Guideline.
USA Care Guidelines 836
Colonoscopy
Last Addressed:
Category: DIAGSTUDY
Prior Status:
Prior Result:
Prior Action:
Start Age: 50 Years
Stop Age: 75 Years
Interval: 10 Years
Hold Date: 08/13/2014
Same as prior
Goal:
Status:
Action:
Update
Place order on Row Select
Due within:
Filter: All
Guideline
Status
Due
Action
Colonoscopy Hold Testing
Consider antiplatelet drugs
Consider statin
Dilated eye exam due
First line meds--thiazides, ACEI/ARB, CCB
Goal <140/90 under age 60; <150/90 over age 60
Influenza vaccine due
Recommend sodium restriction
HIV Completed
Pneumococcal vaccine
Occult Blood, Fecal, IA Completed
Mammogram Completed
Td, preservative free, (7 yrs and older)
Ngkbm Udp Cf Cg Reasons
Reason
All
Diabetes
Health Maintenance
Hypertension
Refresh
OK
Cancel
Notes/Other
Screening Questions

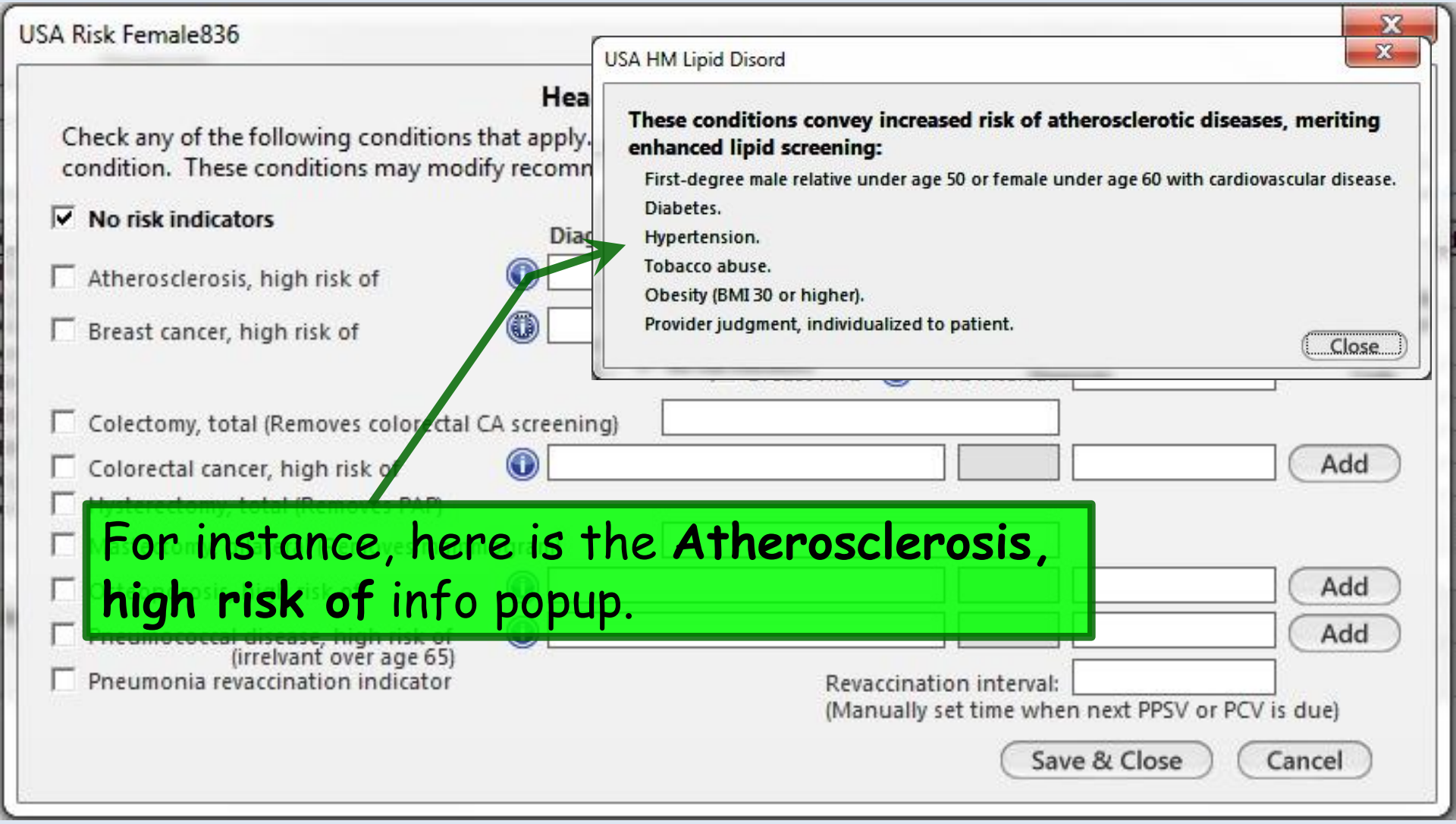

USA Care Guidelines 836
There is also a Due within option. This could come in handy if you only wanted to see things coming due soon.
Colonoscopy
Last Addressed:
Category: DIAGSTUDY
Prior Status:
Prior Result:
Prior Action:
Start Age: 50 Years
Stop Age: 75 Years
Interval: 10 Years
Hold Date: 08/13/2014
Same as prior
Goal:
Status:
Action:
Update
Place order on Row Select
Due within:
Filter: All
Guideline
Status
Due
Action
Colonoscopy
Hold Testing
08/12/2014
Resume testing on 08/13/2015
Consider antiplatelet drugs
08/12/2014
Consider statin
08/12/2014
Dilated eye exam
due
08/12/2014
First line meds--thiazides, ACEI/ARB, CCB
08/12/2014
Goal <140/90 under age 60; <150/90 over age 60
08/12/2014
Influenza vaccine
due
08/12/2014
Recommend sodium restriction
HIV
Completed
Time Interval
Weeks:
0
Months:
1
Years:
0
OK
Cancel
Update
Edit
Notes/Other
Screening Questions
Unfortunately, this just doesn't work right now.

It is technically possible to place orders for Guideline items here, which would be handy. However, in our environment, it is simpler for users to place orders through the Order Module, Diagnostics tab, or whatever other way you've learned to do it.




Activate Clinical Guidelines
Individual Guideline items can be removed. For example, suppose our patient is allergic to flu vaccine. Select it on the Activate Clinical Guidelines popup, then click Remove.
Condition:
Diagnosis:
Code:
Add
Display only selected guideline
Due within:
Risk Indicators Health Maintenance |
Clinical Guidelines History
Status | Guideline | Last Addressed | Due | Interval | Interval Chng Reason | Start Age | Stop Age | Hold | Resume
due | HIV | // | 07/23/2014 | Once | | 15 Years | 65 Years
due | Lipid Panel | // | 07/23/2014 | Once | | 45 Years
due | Mammogram | // | 07/23/2014 | 2 Years | | 50 Years | 75 Years
due | Occult Blood, Fecal, IA | // | 07/23/2014 | 1 year | | 50 years | 75 Years
due | Td, preservative free, (7 yrs and older) | // | 07/23/2014 | 10 Years | | 11 Years
Influenza vaccine | 05/03/2014 | 05/03/2015 | 1 Year | | 3 Years
Depression Screening | 07/08/2014 | 07/08/2015 | 1 Year | | 12 Years
Colonoscopy | 04/30/2014 | 04/30/2024 | 10 years | | 50 years | 75 Years
Remove Guidelines
(Select a condition and click Remove to remove all associated guidelines)
Condition
Health Maintenance
Remove
Delete the selected guideline
Influenza vaccine
Remove
Problem List
Save & Close

The [i] information popups can be helpful reminders about current recommendations, tempered with a few conservatively-rounded corners to help them be as broadly applicable in NextGen as possible for our practices.



For instance, here is the **Atherosclerosis, high risk of** info popup.

Here are the two info popups related to breast cancer.

USA HM Breast Ca

Standard screening is mammogram every 2 years age 50-75.

Enhanced screening is mammogram every year age 40-75.

Employ enhanced screening for:

First-degree relative with breast cancer.

Personal history of previous breast cancer or atypical hyperplasia.

BRCA +.

Provider judgment.

Patient request.

You may wish to use Breast Cancer Risk Tool at www.cancer.gov/bcrisktool to aid in your determination of higher-than-average risk.

CLO

Info Hm Breast Mri

Recommendations for Breast MRI Screening as an Adjunct to Mammography

Recommend Annual MRI Screening (Based on Evidence)

BRCA mutation

First-degree relative of BRCA carrier, but untested
Lifetime risk ~20-25% or greater, as defined by BRCAPRO
or other models that are largely dependent on family history
or equal to 10 years at the time of revaccination.

Recommend Annual MRI Screening (Based on Expert Consensus Opinion)

Radiation to chest between age 10 and 30 years
Li-Fraumeni syndrome and first-degree relatives
Cowden and Bannayan-Riley-Ruvalcaba syndromes and first-degree relatives

Insufficient Evidence to Recommend for or Against MRI Screening

Lifetime risk 15-20%, as defined by BRCAPRO or other models that are largely dependent on family history

Lobular carcinoma in situ (LCIS) or atypical lobular hyperplasia (ALH)

Atypical ductal hyperplasia (ADH)

Heterogeneously or extremely dense breast on mammography

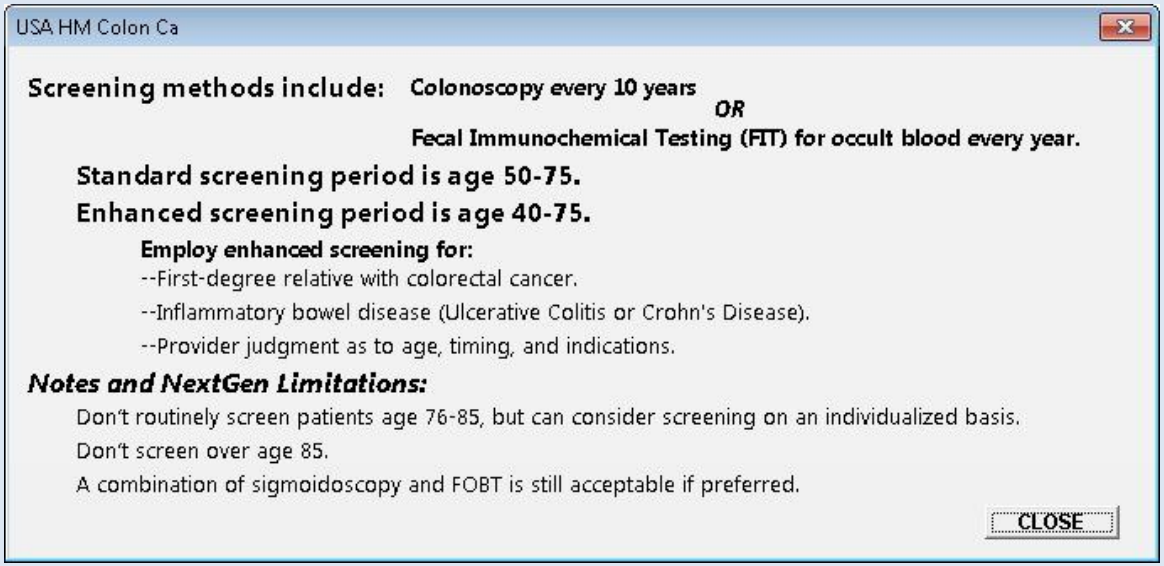
Women with a personal history of breast cancer, including ductal carcinoma in situ (DCIS)

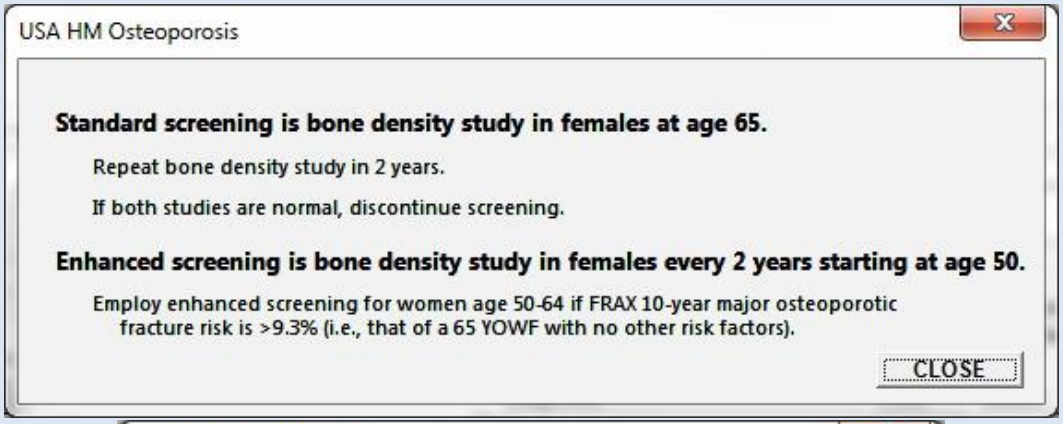
Recommend Against MRI Screening (Based on Expert Consensus Opinion)

Women at <15% lifetime risk

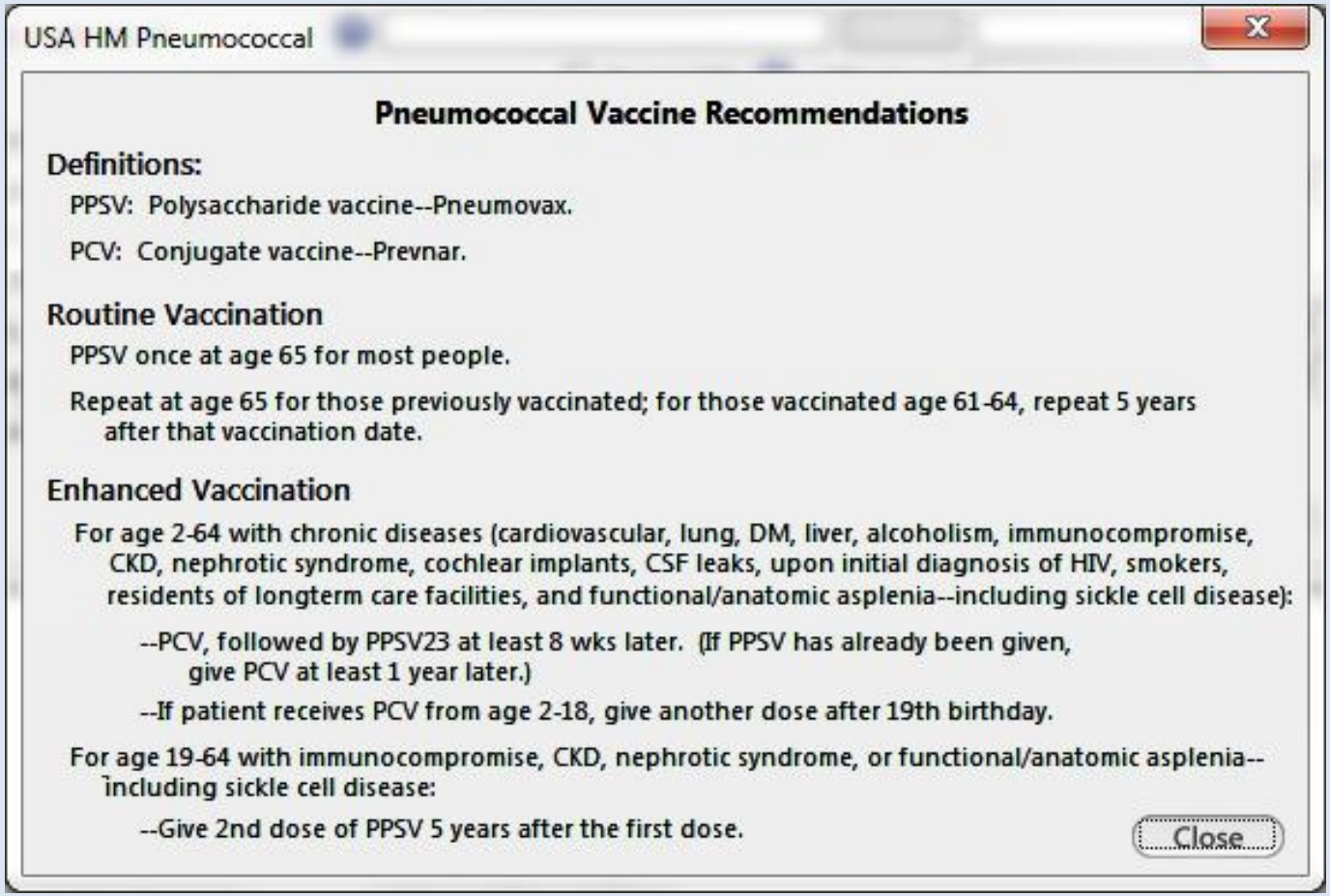
Close

Here are the colon cancer, prostate cancer, & osteoporosis info popups.

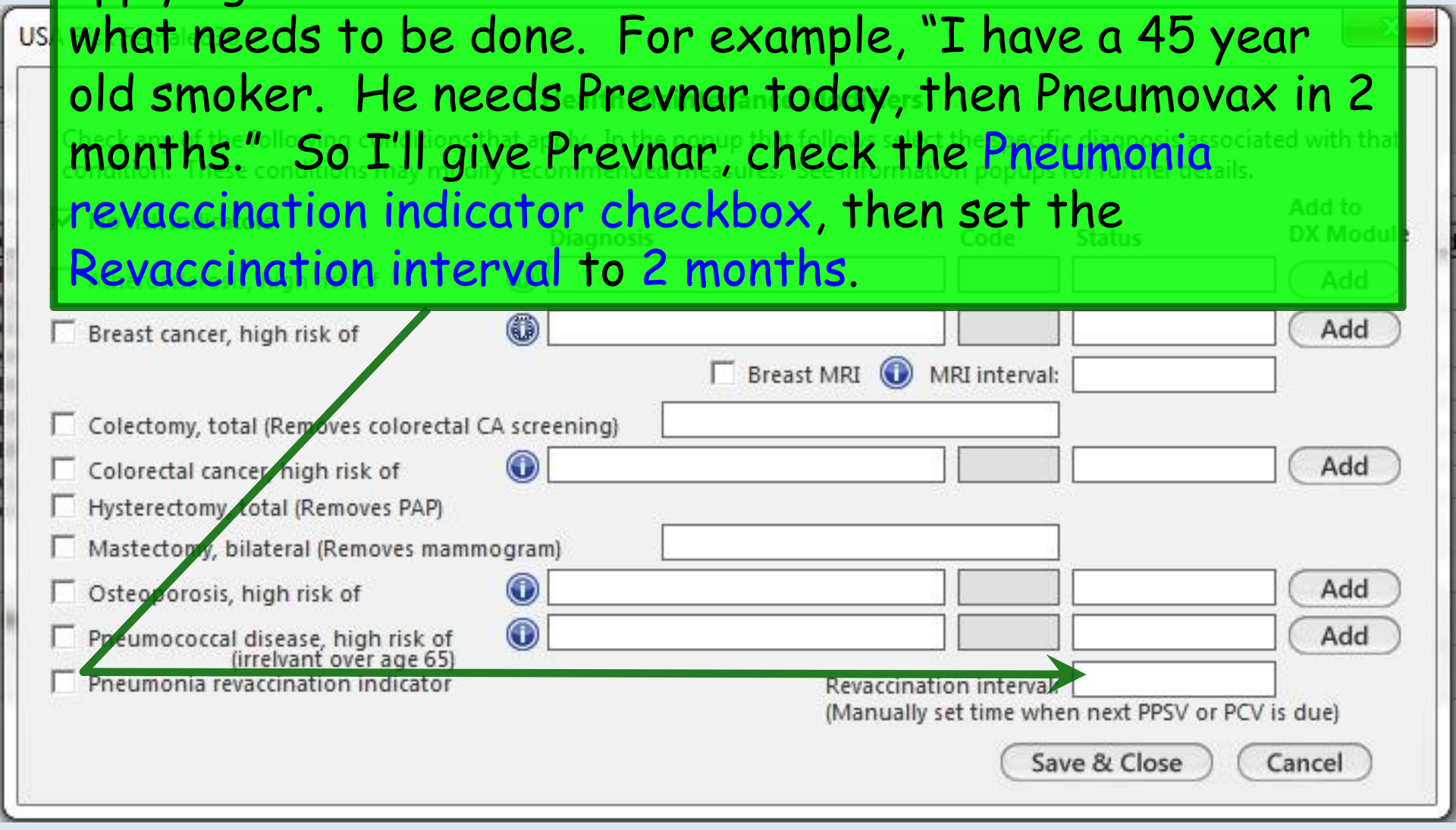




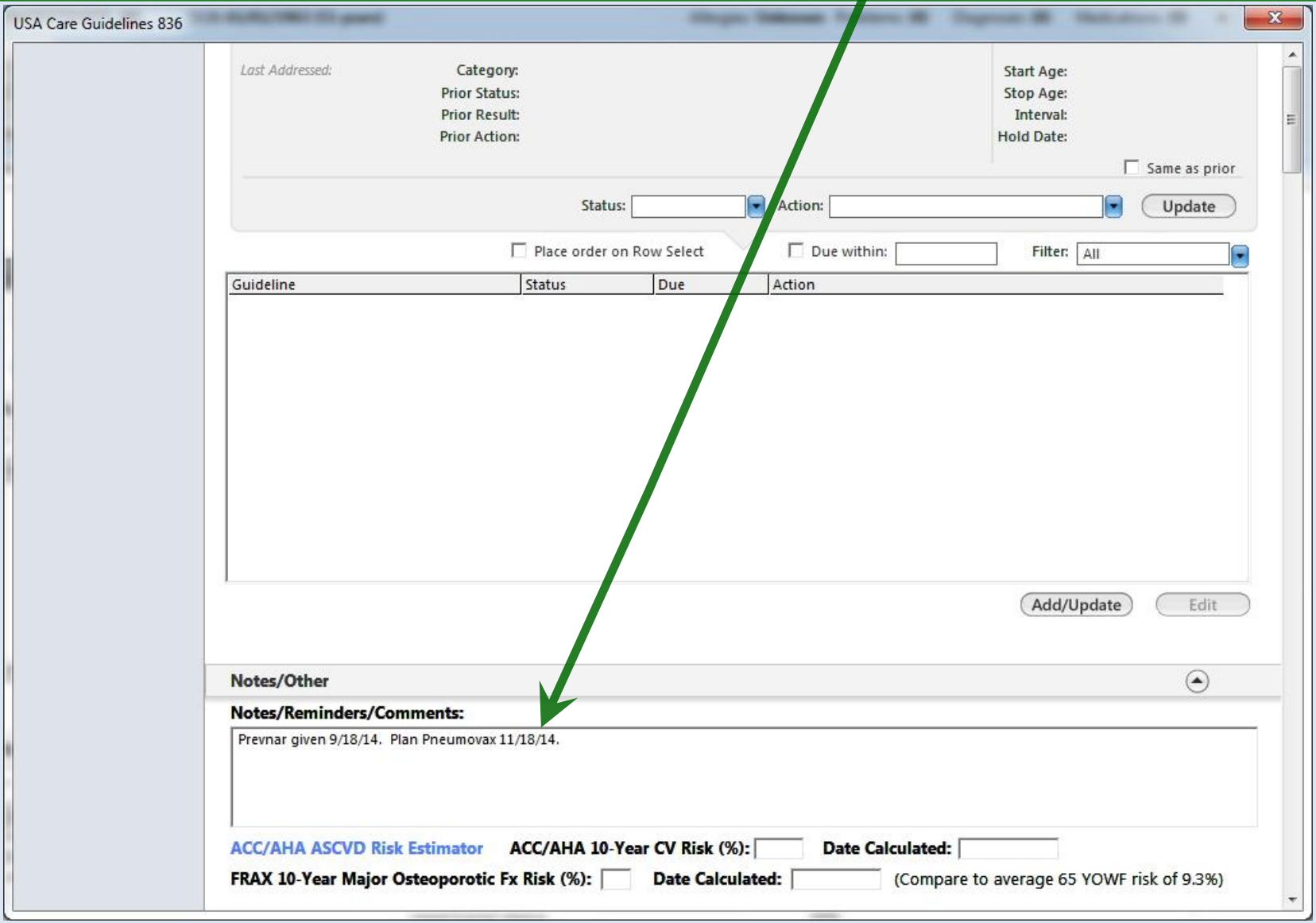
Here is the pneumonia vaccine info popup. This is particularly useful now that two different pneumococcal vaccines are recommended for adults in a variety of circumstances that can be a little hard to remember. (And be warned: the recommendations may well change again in late 2014.)

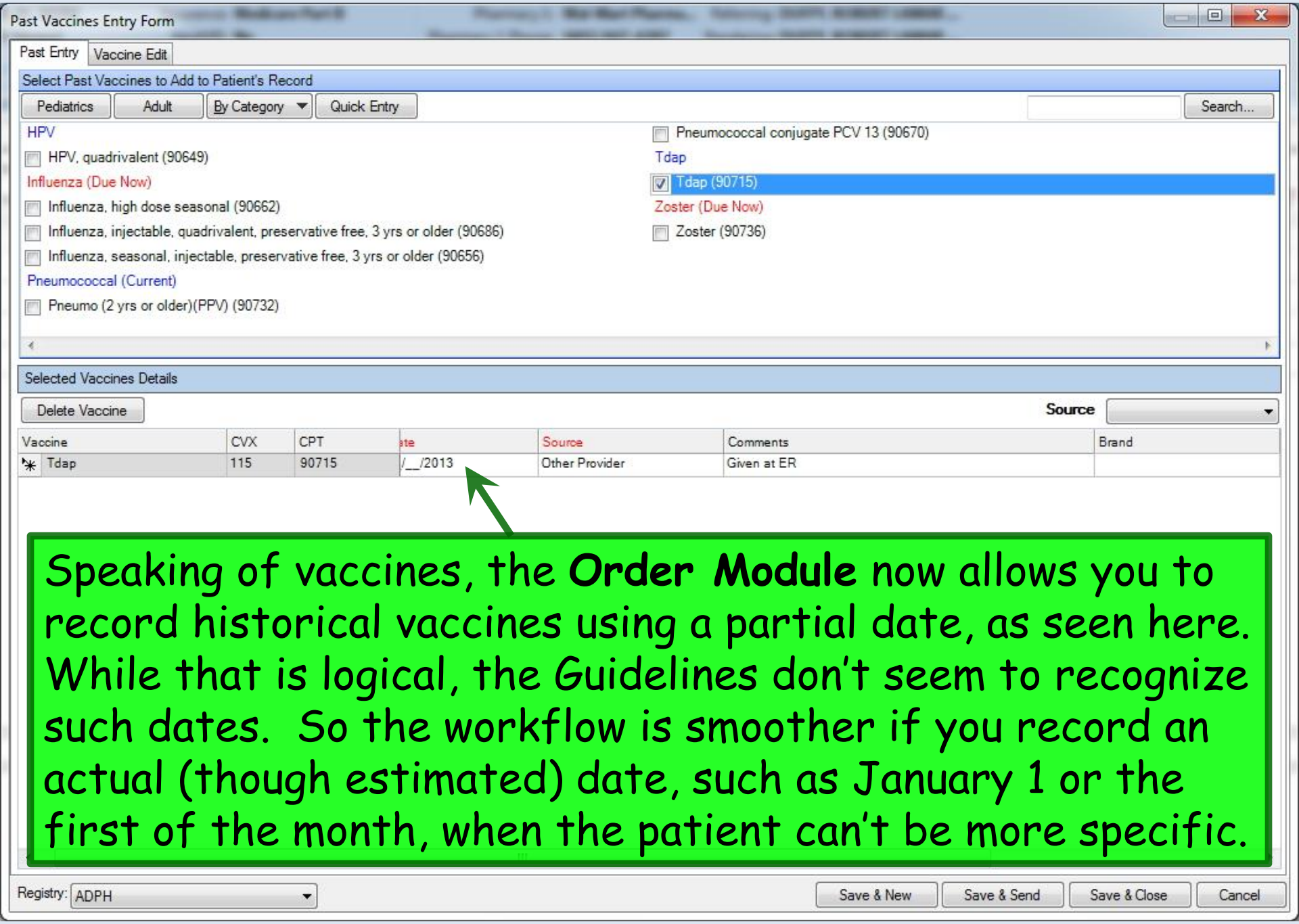


The complexity of the adult pre-65 pneumococcal vaccine recommendations makes it just about impossible for the Guidelines to work perfectly. A good strategy when first applying the Guideline would be to think ahead of time what needs to be done. For example, "I have a 45 year old smoker. He needs Prevnar today, then Pneumovax in 2 months." So I'll give Prevnar, check the Pneumonia revaccination indicator checkbox, then set the Revaccination interval to 2 months.



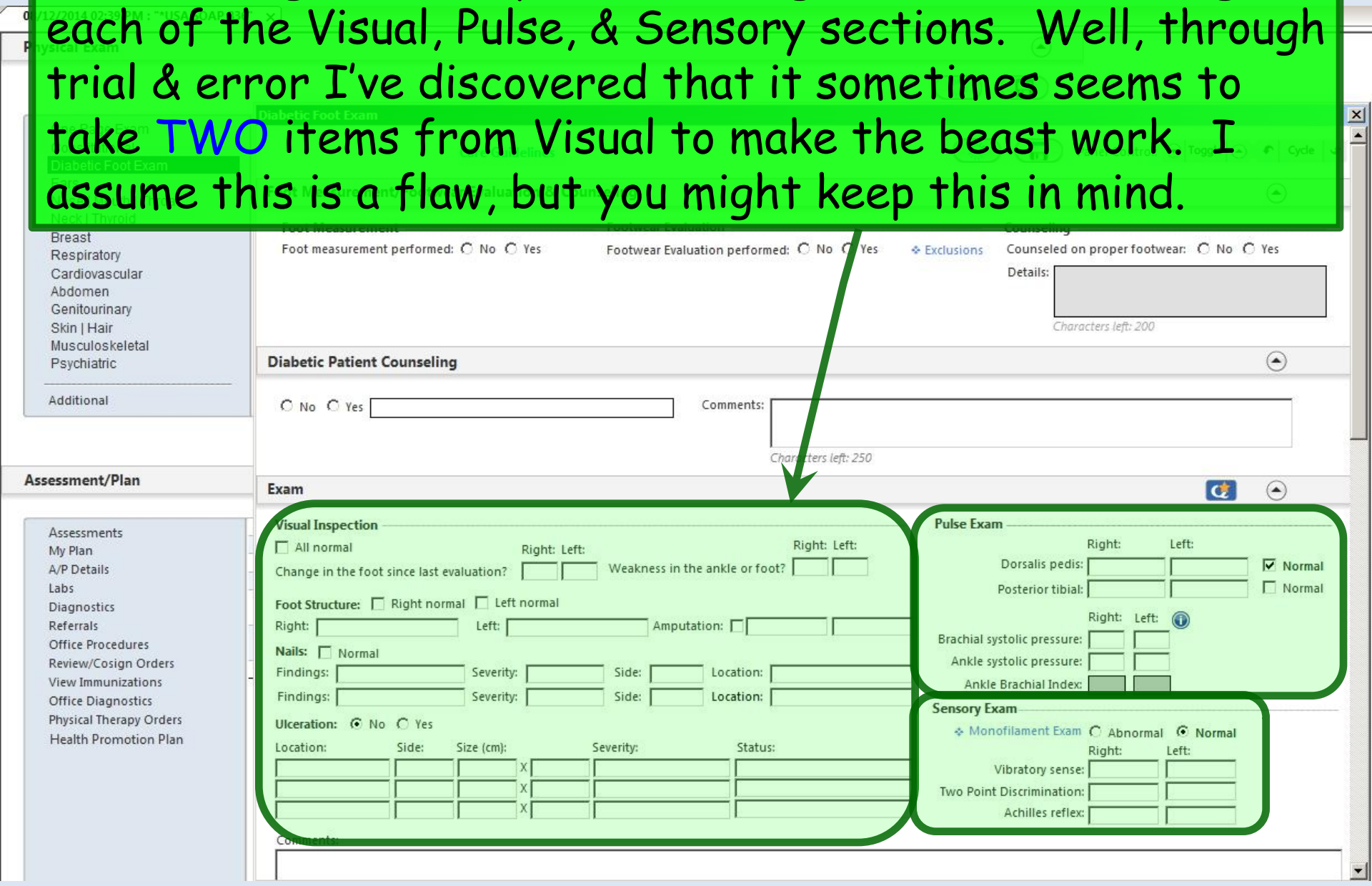
But that requires a lot of forethought, & won't always be practical. This might be a good time to just make use of the Notes/Reminders/Comments field to leave yourself a clue.



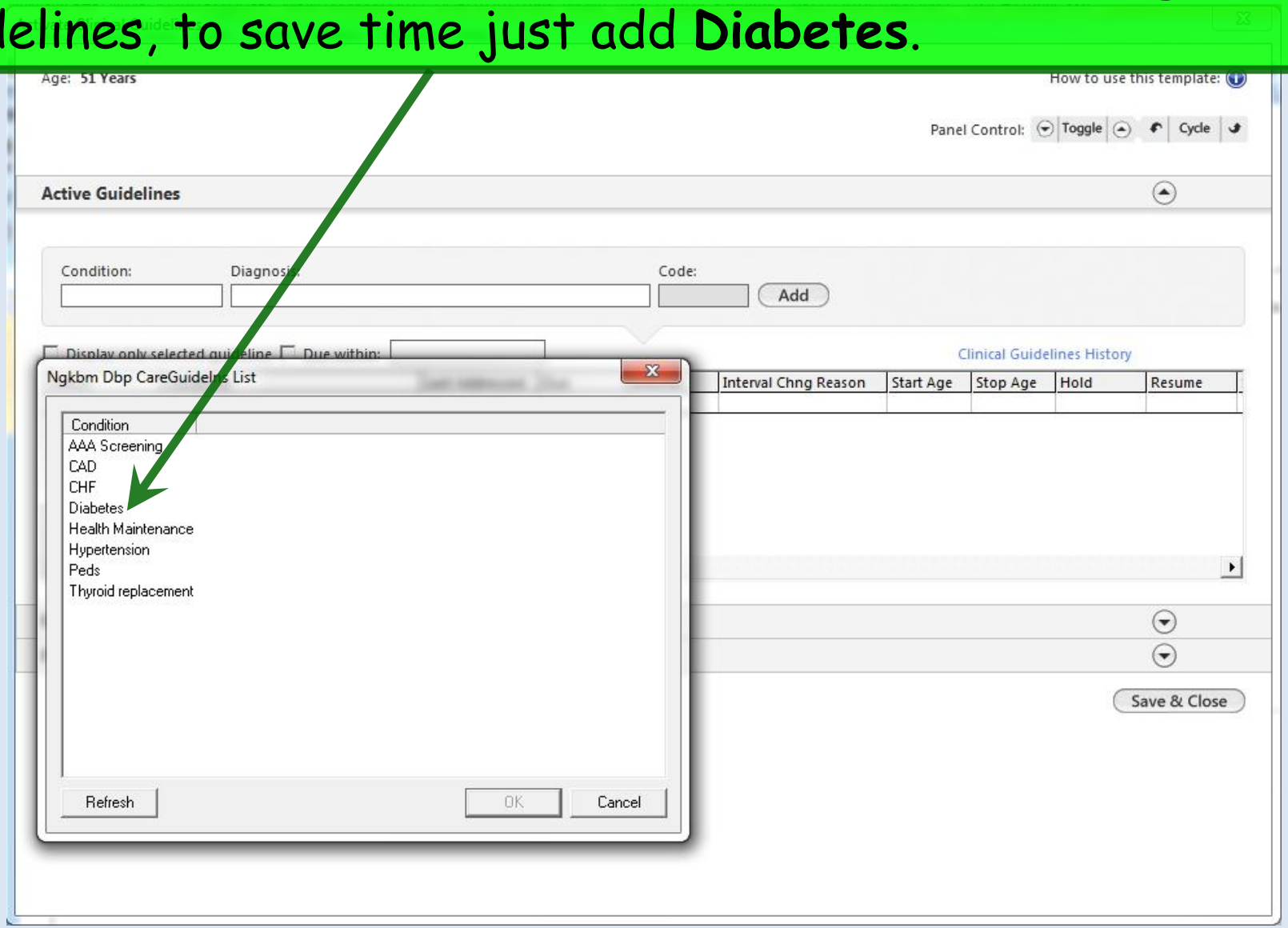


Speaking of vaccines, the **Order Module** now allows you to record historical vaccines using a partial date, as seen here. While that is logical, the Guidelines don't seem to recognize such dates. So the workflow is smoother if you record an actual (though estimated) date, such as January 1 or the first of the month, when the patient can't be more specific.

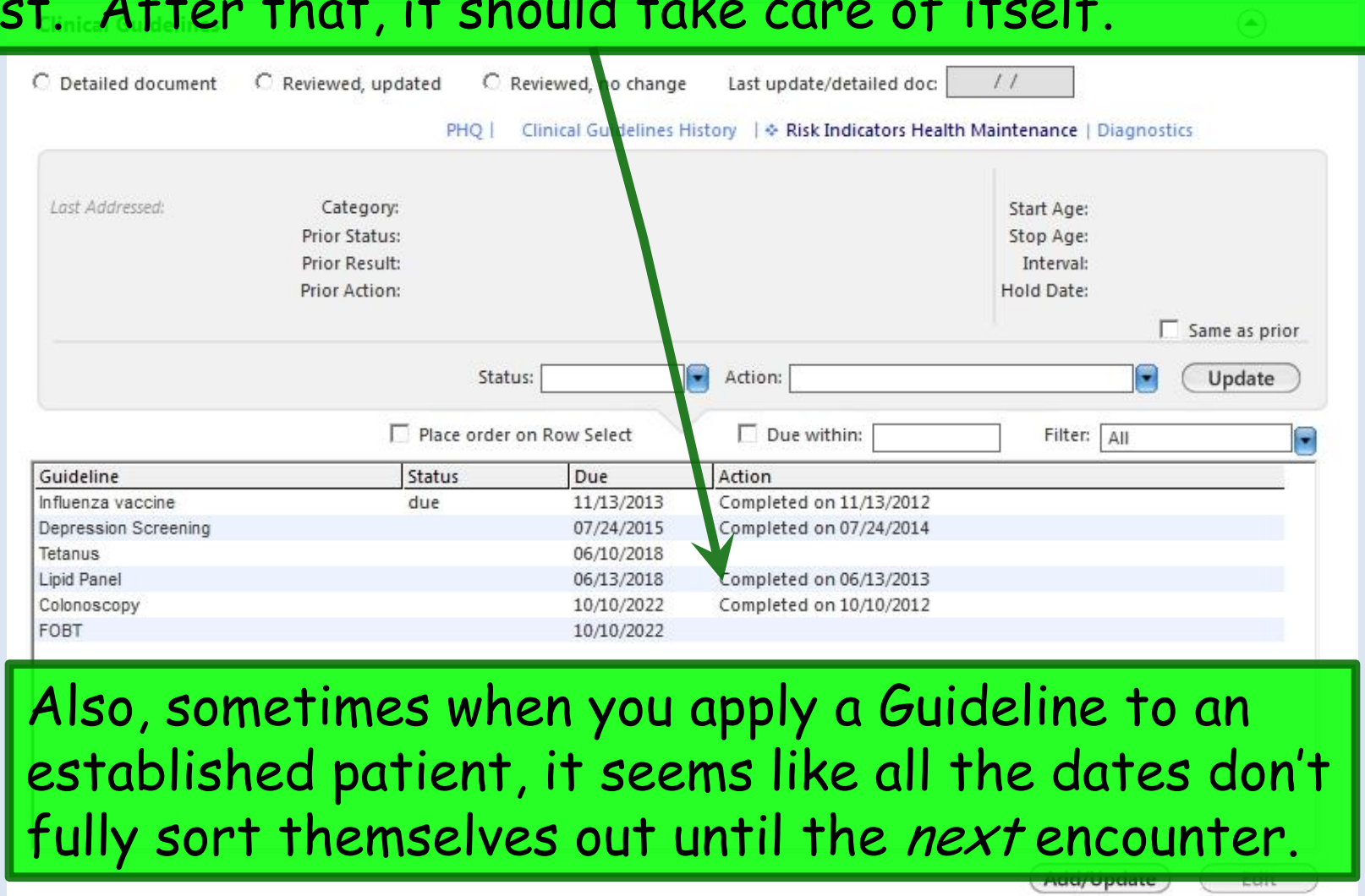
Recall for **Diabetic Foot Exams** I said you'd satisfy the Foot Exam guideline by documenting at least one finding in each of the Visual, Pulse, & Sensory sections. Well, through trial & error I've discovered that it sometimes seems to take TWO items from Visual to make the beast work. I assume this is a flaw, but you might keep this in mind.



LOTS of patients have both diabetes & hypertension. The **Hypertension Guideline** adds nothing that isn't already on the **Diabetes Guideline**. While there is no harm in adding both guidelines, to save time just add **Diabetes**.

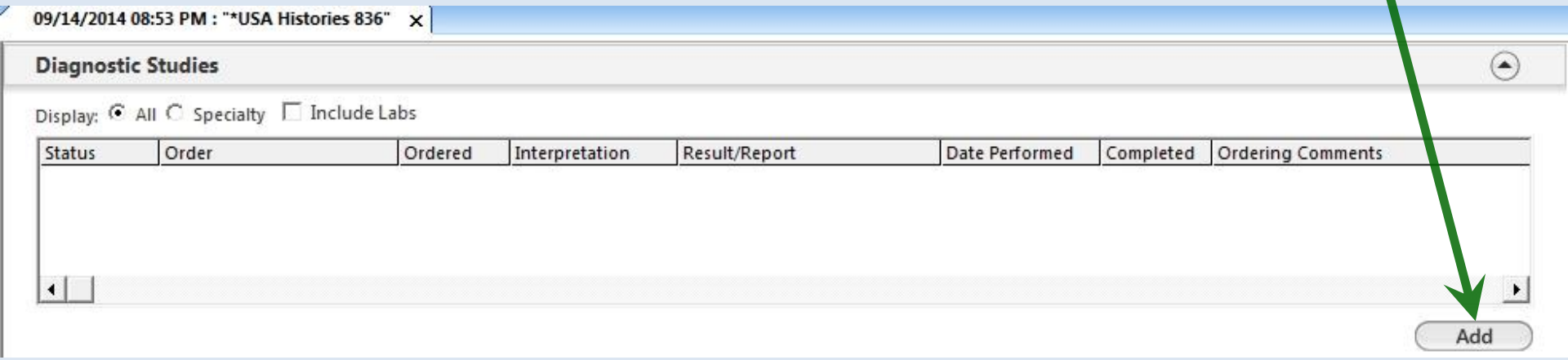


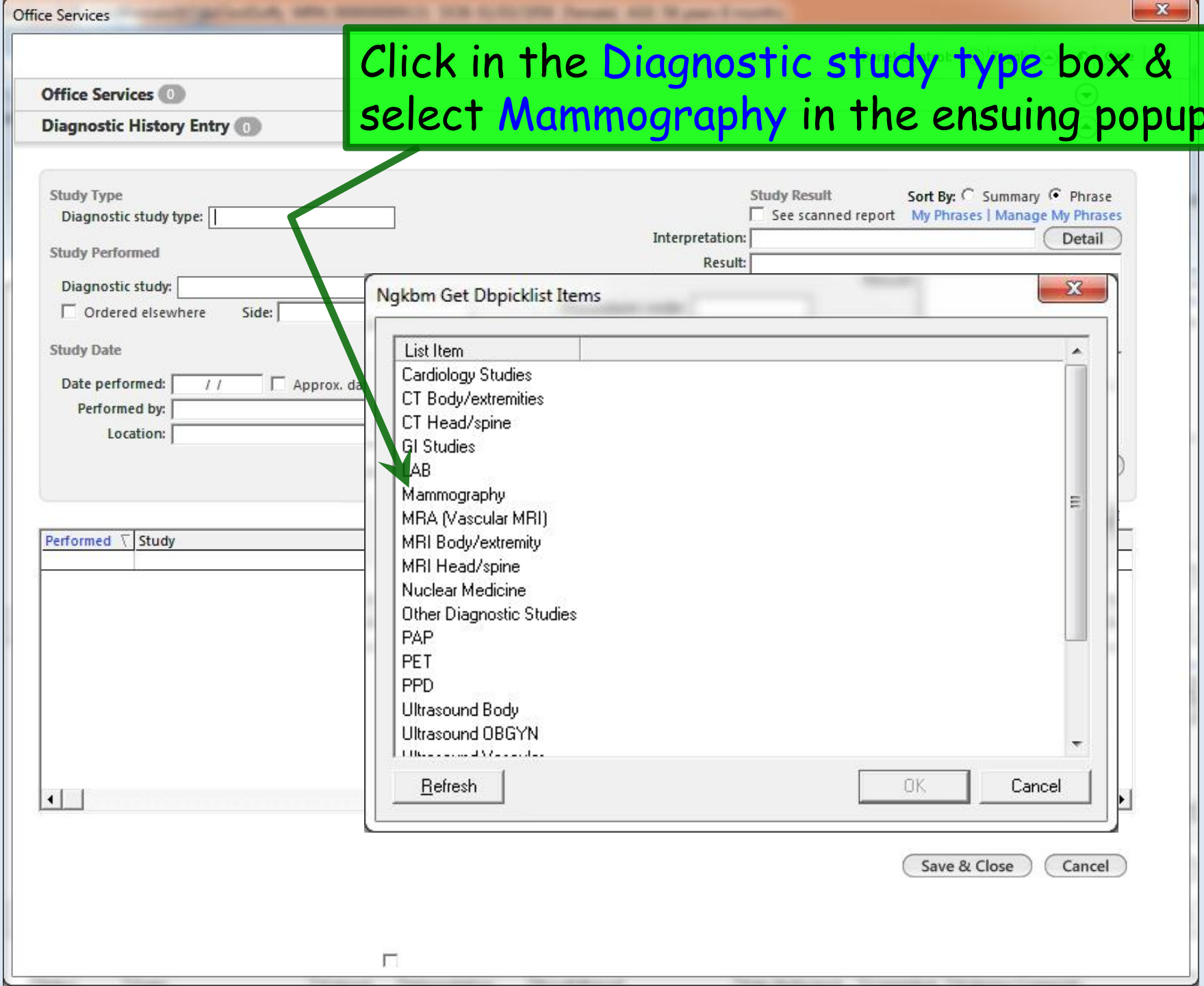
When you first add a Guideline, it USUALLY recognizes if a required test has recently been done, like the lipid panel here. But this doesn't seem to work 100% of the time, so you may need to manually update the Completed Date at first. After that, it should take care of itself.

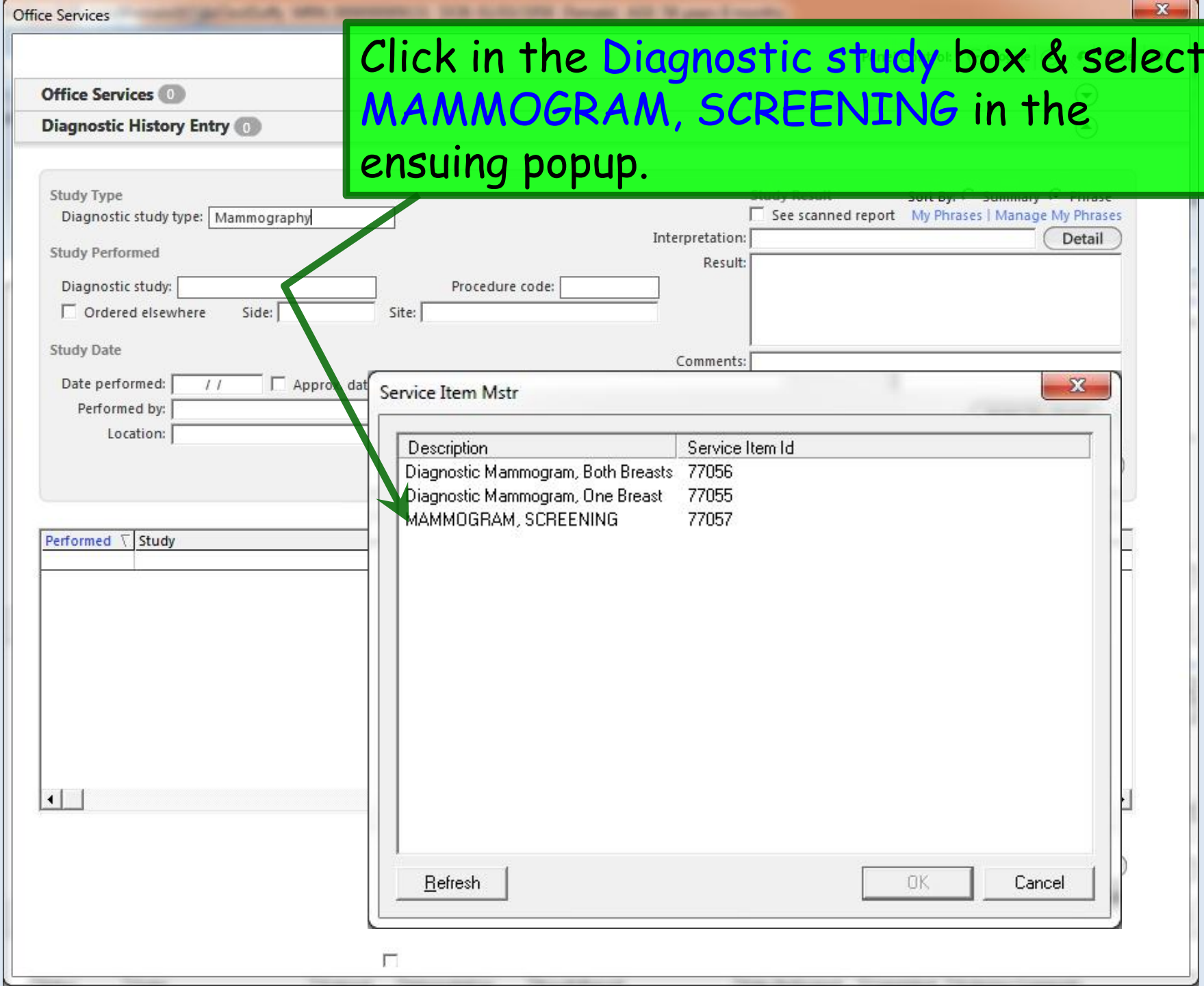


Also, sometimes when you apply a Guideline to an established patient, it seems like all the dates don't fully sort themselves out until the *next* encounter.

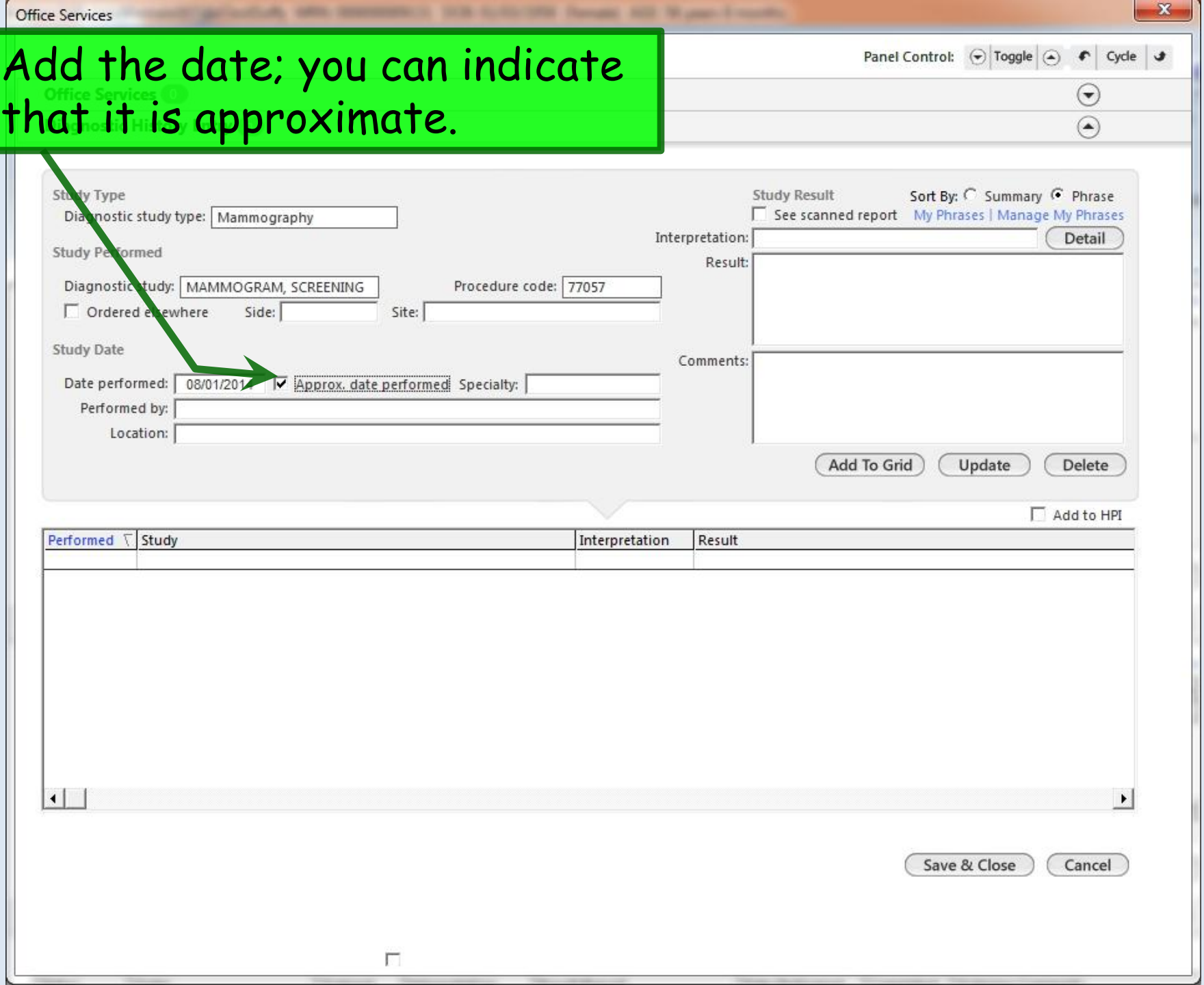
There will be some test results we don't get back electronically in the system, or some times when a patient has had the test done elsewhere. A good example is a mammogram report your patient gives you from elsewhere. You can tick the Guideline off as completed as illustrated above, but if you would like to enter the RESULT as well, you have an option to do that by going to the **Histories Tab**, **Diagnostic Studies section**, & clicking Add.

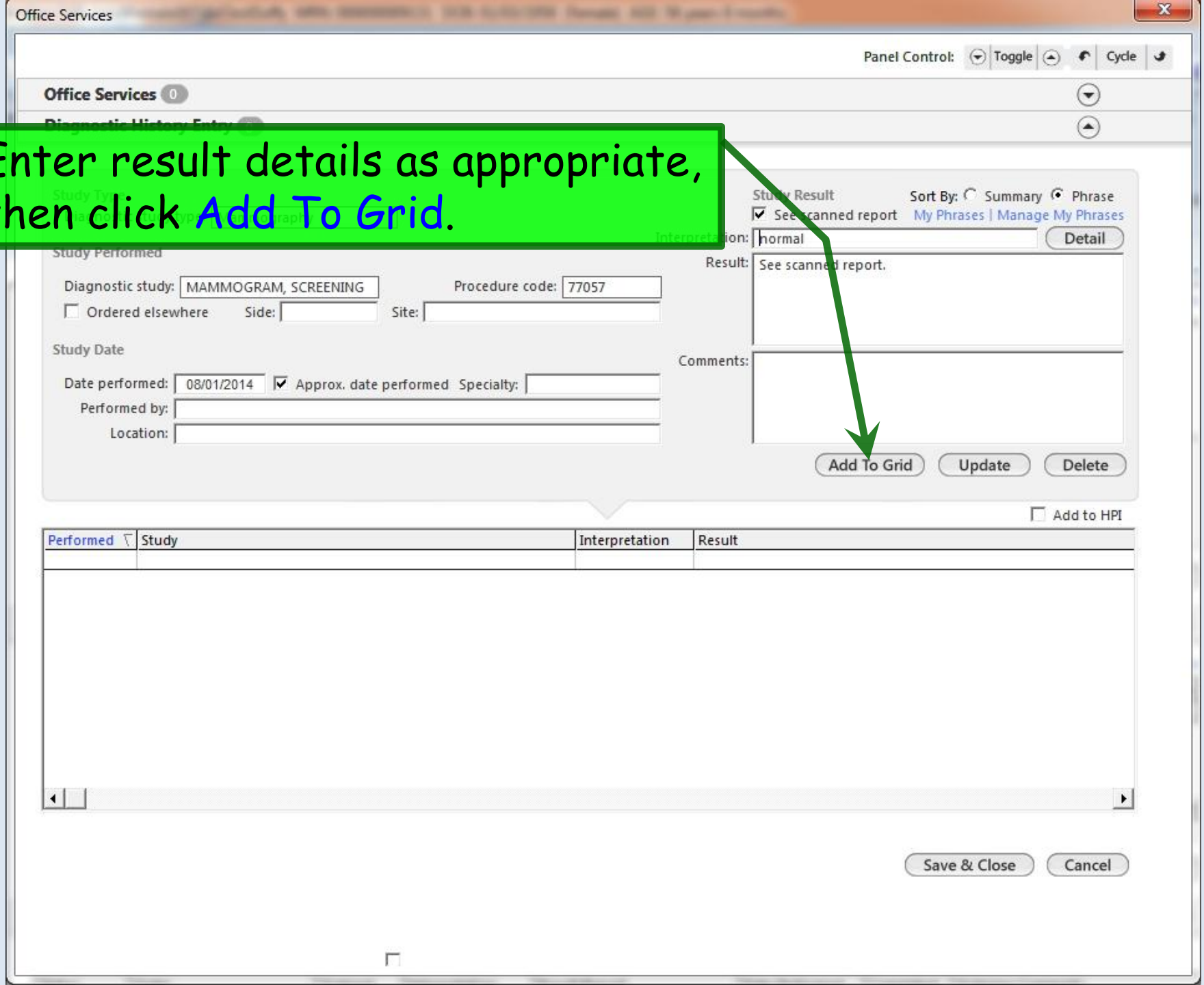


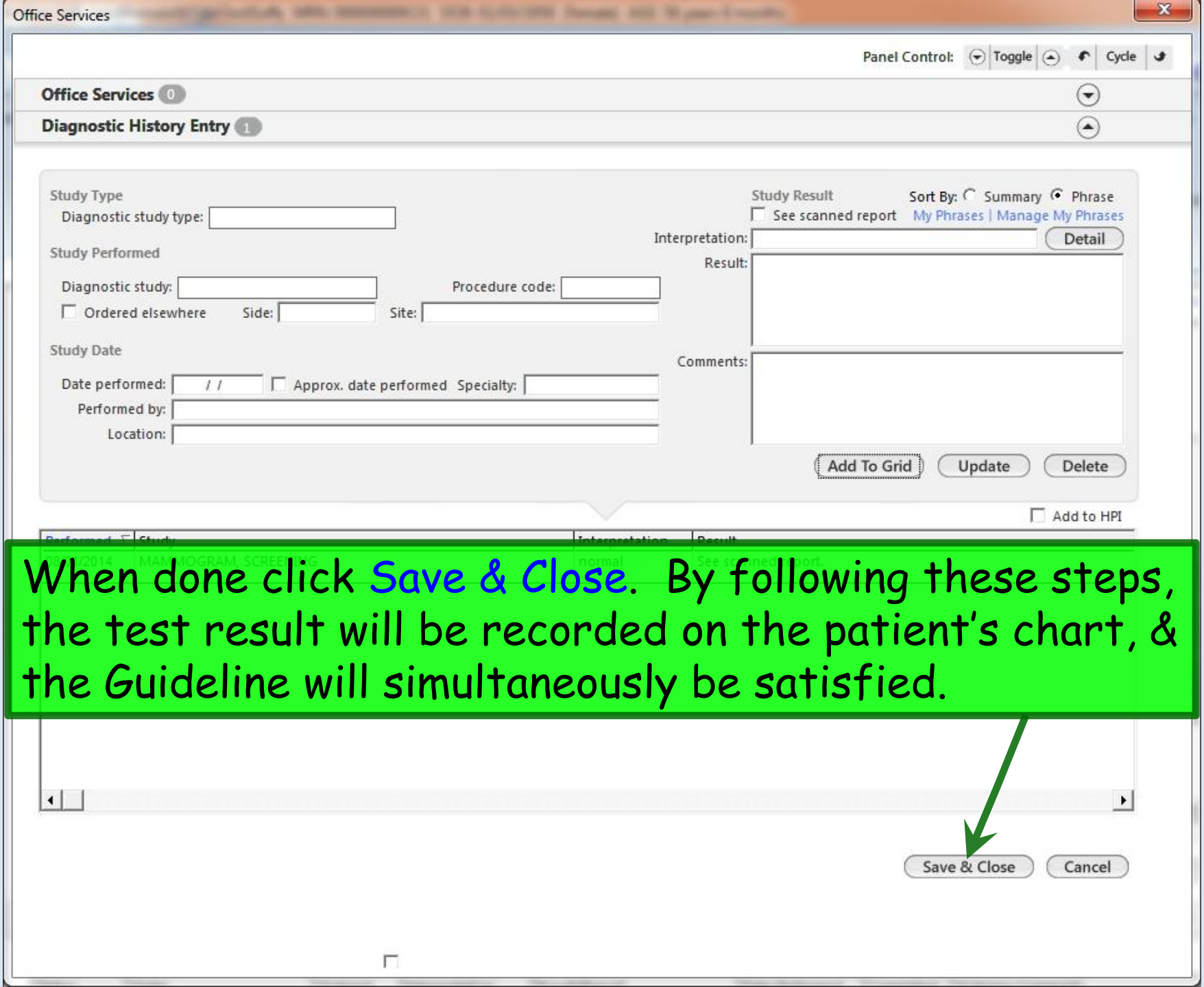

Office Services
Click in the Diagnostic study type box & select Mammography in the ensuing popup.
Office Services 0
Diagnostic History Entry 0
Study Type
Diagnostic study type:
Study Performed
Diagnostic study:
Ordered elsewhere
Side:
Study Date
Date performed:
Performed by:
Location:
Study Result
See scanned report
Sort By: Summary Phrase
My Phrases | Manage My Phrases
Interpretation:
Detail
Result:
Performed
Study
Ngkbm Get Dbpicklist Items
List Item
Cardiology Studies
CT Body/extremities
CT Head/spine
GI Studies
LAB
Mammography
MRA (Vascular MRI)
MRI Body/extremity
MRI Head/spine
Nuclear Medicine
Other Diagnostic Studies
PAP
PET
PPD
Ultrasound Body
Ultrasound OBGYN
Refresh
OK
Cancel
Save & Close
Cancel



Click in the Diagnostic study box & select MAMMOGRAM, SCREENING in the ensuing popup.


Add the date; you can indicate that it is approximate.
Office Services
Panel Control:
Toggle
Cycle
Study Type
Diagnostic study type:
Mammography
Study Performed
Diagnostic study:
MAMMOGRAM, SCREENING
Procedure code:
77057
Ordered elsewhere
Side:
Site:
Study Date
Date performed:
08/01/201
Approx. date performed
Specialty:
Performed by:
Location:
Study Result
Sort By:
Summary
Phrase
See scanned report
My Phrases | Manage My Phrases
Interpretation:
Detail
Result:
Comments:
Add To Grid
Update
Delete
Add to HPI
Performed
Study
Interpretation
Result
Save & Close
Cancel


Office Services
Panel Control: Toggle Cycle
Office Services 0
Enter result details as appropriate, then click Add To Grid.
Study Result
Sort By: Summary Phrase
See scanned report
My Phrases | Manage My Phrases
Interpretation: normal
Detail
Result: See scanned report.
Study Performed
Diagnostic study: MAMMOGRAM, SCREENING
Procedure code: 77057
Ordered elsewhere
Side:
Site:
Study Date
Date performed: 08/01/2014
Approx. date performed
Specialty:
Performed by:
Location:
Comments:
Add To Grid
Update
Delete
Add to HPI
Performed
Study
Interpretation
Result
Save & Close
Cancel


Office Services
Panel Control: Toggle Cycle
Office Services 0
Diagnostic History Entry 1
Study Type
Diagnostic study type:
Study Performed
Diagnostic study:
Procedure code:
Ordered elsewhere
Side:
Site:
Study Date
Date performed:
Approx. date performed
Specialty:
Performed by:
Location:
Study Result
Sort By: Summary Phrase
See scanned report
My Phrases | Manage My Phrases
Interpretation:
Detail
Result:
Comments:
Add To Grid
Update
Delete
Add to HPI
When done click Save & Close. By following these steps, the test result will be recorded on the patient's chart, & the Guideline will simultaneously be satisfied.
Save & Close
Cancel

Notes About The Guidelines Themselves

- We currently have Guidelines set up for a small handful of conditions, though they will cover a lot of our patients' needs.
- These Guidelines are evidence- or consensus-based to the extent possible, & follow recommendations from authoritative sources, such as USPSTF, CDC, ACIP, AAFP, AHA, ADA, occasionally tempered by practical concerns, technical limitations, or P4P requirements.

What Guidelines Do We Have Established?

- We may we establish some other Guidelines in the future, but it has thus far been…challenging…to get these things to work, so these will give us a good starting point to gain experience & test behavior.
- These are not expected to cover every possible clinical scenario, & provider judgment will always be required to individualize general recommendations.

What Guidelines Do We Have Established?

- We currently have Guidelines set up for the following conditions:
  - Health Maintenance
  - Diabetes
  - Hypertension
  - Thyroid replacement
  - Abdominal aortic aneurysm screening
- The following slides will briefly summarize the measures included on each of these.

Health Maintenance Guidelines

- Breast cancer screening
  - For average-risk females, mammogram Q 2 years age 50-75.
  - For high-risk females, mammogram Q 1 year age 40-75.
- Cervical cancer screening
  - For females age 21-29, pap smear Q 3 years.
  - For females age 30-65, pap + HPV testing Q 5 years.

Health Maintenance Guidelines

- Colon cancer screening
  - For average risk patients:
    - Fecal Immunochemical (or similar) occult blood test Q 2 years age 50-75.

    or

    - Colonoscopy Q 10 years age 50-75.
- Depression screening
  - PHQ-2 or other screening tool once yearly starting age 12.

Health Maintenance Guidelines

- HIV screening
  - At least once during age 15-65.
- HPV vaccine
  - Series of 3 vaccines during age 9-26.
- Influenza vaccine
  - Yearly for everyone.

Health Maintenance Guidelines

- Lipid screening
  - For average-risk males, lipid panel Q 5 years starting age 35.
  - For average-risk females, lipid panel once at age 45.
  - For high-risk males & females, lipid panel Q 5 years starting age 20.

Health Maintenance Guidelines

- Osteoporosis screening
  - For average-risk females:
    - Bone density study at age 65.
    - Repeat in 2 years.
    - If still normal, discontinue testing.
  - For high-risk females:
    - Bone density study Q 2 years starting at age 50.

Health Maintenance Guidelines

Pneumonia vaccines

PPSV: Polysaccharide vaccine (Pneumovax)

PCV: Conjugate vaccine (Prevnar)

- Routine vaccination:
  - PPSV at age 65 for everyone.
    - If given age 61-64, repeat 5 years after that.

Health Maintenance Guidelines

Pneumonia vaccines

PPSV: Polysaccharide vaccine (Pneumovax)

PCV: Conjugate vaccine (Prevnar)

- Enhanced vaccination:
  - For age 2-64 with chronic diseases (cardiovascular, lung, DM, liver, alcoholism, immunocompromise, CKD, nephrotic syndrome, cochlear implants, CSF leaks, upon initial diagnosis of HIV, smokers, residents of longterm care facilities, or functional/anatomic asplenia—including sickle cell disease):
    - PCV followed by PPSV at least 8 weeks later. (If PPSV already given, give PCV at least 1 year later.)
    - If PCV given age 2-18, give another dose after 19th birthday.
  - For age 19-64 with immunocompromise, CKD, nephrotic syndrome, or functional/anatomic asplenia—including sickle cell disease:
    - Give 2nd dose of PPSV 5 years after the first dose.

Health Maintenance Guidelines

- Tetanus vaccination:
  - Tetanus vaccine Q 10 years starting age 12.
  - At least one dose after age 12 should be Tdap.

Abdominal Aortic Aneurysm Guidelines

- Limited abdominal ultrasound once age 65-75 for men who have ever smoked.

Diabetes Guidelines

- BMP yearly.
- Dilated eye exam yearly.
- Comprehensive foot exam yearly.
- HbA1c Q 3 months.
- Lipid panel yearly.
- Urine microalbumin yearly.

Hypertension Guidelines

- BMP yearly.
- Urine microalbumin Q 3 years.

Thyroid Replacement Guidelines

- TSH Q 2 years.

This concludes the NextGen Guidelines demonstration.

If life gives you lemons, make lemonade, but if life gives you salmon, don't make salmonella.

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University of South Alabama
College of Medicine
Department of Family Medicine