SNOMED CT® and the Integrated Problem List (IPL)

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IHS Office of Information Technology
EHR Program
Topics

- Overview of SNOMED CT®
- Getting started with IPL – tips for a smooth transition
- Overview of the IPL functionality
- Rolling out IPL functionality
What is SNOMED CT®?

Systematized NOmenclature of MEDicine Clinical Terms (SNOMED CT®) is a comprehensive, multilingual clinical terminology that provides clinical content and expressivity for clinical documentation.

Clinician friendly language to document clinical impressions, findings, and diagnoses.
Why the Change to SNOMED CT®?

• 2014 Certified EHR requires:
  • SNOMED CT® for problem list
  • Longitudinal problem-focused documentation including goals, care plans, and visit instructions
  • SNOMED CT® for much of the data used in Clinical Quality Measures

• Transition to ICD-10 - our goals are to:
  • Stabilize the user interface in advance of ICD-10 changes
  • Improve clinical documentation of problems and encounter diagnoses to support ICD-10 coding
More About SNOMED CT®

- Extremely large set of concepts and descriptions representing many standard terminologies
- Scalable for a variety of uses
- Owned and maintained by the International Health Terminology Standards Development Organisation (IHTSDO) in Denmark
- Released in the U.S. by the National Library of Medicine (NLM)

Source: IHTSDO, www.snomed.org
Clinical Expressions

**Concept** – the computer readable “code”

*Example:* 823660015 (concept for the disorder of the Common Cold)

**Descriptions** – explain concepts in a human readable expression

*Example:*
- Common cold (disorder) – fully specified name which is unique
- Common cold – preferred term
- Cold – synonym
- Head cold – synonym

**Relationships** – define the type of association between two related concepts

*Example:* Common Cold (disorder), a viral upper respiratory tract infection (disorder)
SNOMED CT®
Reduces Ambiguity
SNOMED CT ® Definitions (cont.)

Scalability and Mapping

*Subsets* - reference sets, value sets - a collection of SNOMED CT® concepts used for a particular purpose

**Example:** Pick list, sub-search, drop down selection in EHR

*Extensions* - incorporate concepts, descriptions and terms unique to a particular region or country

**Example:** U.S. and U.K. have their own extensions

*Cross maps* - explicit links to health-related classifications and coding schemes such as ICD-9-CM and ICD-10

**Example:** SNOMED to ICD-9 map
SNOMED CT® in the RPMS EHR

Where will you see SNOMED CT®?

• You will select SNOMED CT® terms instead of ICD-9 or ICD-10 codes for diagnoses and conditions on the problem list, and clinical indications when ordering labs, medications, and consults.

• SNOMED CT® codes will also be stored in the background in other areas of the EHR.
What does this mean for the clinical user?

- The most significant change is a redesigned and redefined problem list.
- The way problems are entered and managed and how POVs are selected has been changed.
What Is the Single Most Important Thing I Can Do Now to Prepare?

Clean up existing problem lists.

- Remove redundant entries.
- Remove inappropriate entries.
- Inactivate resolved problems.
- Focus on cleaning up active problems; if time allows, clean up inactive problems.
- Ensure problem entries are coded when possible.
  - When updating, search and select coded entry.
  - Data entry can run a list of un-coded problems and assist with coding \textit{(do not ask coders to do this until the clinical staff has removed redundant and inappropriate entries)}. 
Mappings to ICD

Mappings are an integral part of the design of the Integrated Problem List and how SNOMED CT® will assist IHS with the transition to ICD-10.

These mappings automate, only when appropriate, assignment of ICD codes.

Mappings are transparent to the user. They are visible when selecting a SNOMED, on the problem list, visit diagnosis, and clinical indications.
SNOMED CT® Related Maps Used in RPMS

ICD-9 to SNOMED CT® reverse map developed by Centers for Medicare and Medicaid Services (CMS) and released by the NLM

- **Use in EHR** - assist in the transition of problem lists to SNOMED

![ICD 9 to SNOMED CT Lookup](image)
SNOMED CT® Related Maps Used in RPMS (cont.)

SNOMED CT® to ICD-9 – *provided by CMS and delivered by NLM*

- **Use in EHR** – for SNOMED problems and problems selected as POVs prior to ICD-10 transition
### SNOMED to ICD-9 Mapping Examples

<table>
<thead>
<tr>
<th>SNOMED Term</th>
<th>ICD-9</th>
<th>Storage of Mapped Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunburn of second degree</td>
<td>Sunburn of second degree 692.76</td>
<td>1:1 This is a 1:1 match so will store in the POV when selected.</td>
</tr>
<tr>
<td>Diabetic Nephropathy</td>
<td>Diabetes with renal manifestations, type II or unspecified type, not</td>
<td>1:1: This is a 1:1 match so will store both ICD-9 codes. When problem is selected as</td>
</tr>
<tr>
<td></td>
<td>stated as uncontrolled 250.00 Nephritis and nephropathy, not specified</td>
<td>POV, 2 POVs will store.</td>
</tr>
<tr>
<td></td>
<td>as acute or chronic, in diseases classified elsewhere 583.81</td>
<td></td>
</tr>
<tr>
<td>Ganglion of the wrist</td>
<td>Ganglion of joint 727.41</td>
<td>Narrow to Broad: Closest ICD-9 code is less specific than the SNOMED. This will store</td>
</tr>
<tr>
<td></td>
<td></td>
<td>in POV when selected.</td>
</tr>
</tbody>
</table>

*When there is no mapping available OR when the closest ICD-9 code is more specific than the SNOMED, then the system will assign .9999 un-coded. The code assigned by coders will depend on the SNOMED term selected and the remainder of the visit documentation.*
SNOMED CT® Related Maps Used in RPMS (more)

SNOMED CT® to ICD-10 – *Rule-based map developed and maintained by IHTSDO with WHO, validated by AHIMA and released in U.S. by NLM*

- **Use in EHR** – for SNOMED problems and POVs on or after the ICD-10 compliance date
SNOMED to ICD-10 Mapping Examples

<table>
<thead>
<tr>
<th>SNOMED Term</th>
<th>ICD-10</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essential Hypertension</td>
<td>Essential hypertension I10</td>
<td>“Always true” rule: This is 1:1 match. Will store in POV when selected.</td>
</tr>
<tr>
<td>Type II diabetes mellitus uncontrolled</td>
<td>Type 2 diabetes mellitus with hyperglycemia E11.65</td>
<td>“Always true” rule: This is 1:1 match. Will store in POV when selected. Also contains the following map advice which coders can see – “Use additional code to identify any insulin use (Z79.4)”</td>
</tr>
<tr>
<td>Cerebral Edema</td>
<td>Cannot be automatically mapped</td>
<td>This requires more information to code. Passes map advice which can be seen by coders as hover on problem list, and in PCC data entry.</td>
</tr>
</tbody>
</table>

- “Always true” map rule is 1:n mapping. SNOMEDs assigned any other map rules require additional data to determine codes and the system will assign ZZZ.999 un-coded diagnosis.
- All other map rule types store ZZZ.999 “uncoded” diagnoses; however, may contain map advice.
- Any “map advice” from the SNOMED to assist coders in selecting ICD-10 code is passed for viewing in EHR and PCC data entry.
Map Advice

- Part of the SNOMED to ICD-10 mapping tool released by NLM
- Advice is specific for selected SNOMED code and part of the information retrieved from the SNOMED database
- Provides coders with a target code (and secondary codes when applicable) and tips to help them assign ICD-10 based on the encounter documentation
- Visible via hover on the IPL in the EHR and in PCC Data Entry for each SNOMED concept
- Can help coding staff educate providers about required documentation for ICD-10
Example of Map Advice for SNOMED
Term “Cerebral Edema”

ICD: ZZZ.999

Rule #1  Target Code: G93.6
ALWAYS G93.6

Rule #2  Target Code: P11.0
IF CEREBRAL EDEMA DUE TO BIRTH INJURY CHOOSE P11.0
MAP OF SOURCE CONCEPT IS CONTEXT DEPENDENT

Rule #3  Target Code: S01.80X?
IF TRAUMATIC CEREBRAL EDEMA WITH OPEN INTRACRANIAL WOUND CHOOSE S01.80X?
EPISODE OF CARE INFORMATION NEEDED
POSSIBLE REQUIREMENT FOR AN EXTERNAL CAUSE CODE
MAP OF SOURCE CONCEPT IS CONTEXT DEPENDENT

Rule #4  Target Code: S06.1X0?
IF TRAUMATIC CEREBRAL EDEMA CHOOSE S06.1X0?
CONSIDER ADDITIONAL CODE TO IDENTIFY SPECIFIC CONDITION OR DISEASE
EPISODE OF CARE INFORMATION NEEDED
POSSIBLE REQUIREMENT FOR AN EXTERNAL CAUSE CODE
MAP OF SOURCE CONCEPT IS CONTEXT DEPENDENT

Rule #5  Target Code: S06.1X0?
IF TRAUMATIC CEREBRAL EDEMA WITH OPEN INTRACRANIAL WOUND CHOOSE S06.1X0?
EPISODE OF CARE INFORMATION NEEDED
POSSIBLE REQUIREMENT FOR AN EXTERNAL CAUSE CODE
MAP OF SOURCE CONCEPT IS CONTEXT DEPENDENT

Rule #6  Target Code: S06.1X0?
IF TRAUMATIC CEREBRAL EDEMA WITHOUT OPEN INTRACRANIAL WOUND CHOOSE S06.1X0?
EPISODE OF CARE INFORMATION NEEDED
POSSIBLE REQUIREMENT FOR AN EXTERNAL CAUSE CODE
MAP OF SOURCE CONCEPT IS CONTEXT DEPENDENT
No mapping advice available
## SNOMED CT® vs. ICD

### For Clinician Documentation

<table>
<thead>
<tr>
<th>SNOMED</th>
<th>ICD</th>
</tr>
</thead>
</table>
| Better clinical coverage  
  • 100,000 terms in clinical findings hierarchy | Statistical focus, less common diseases lumped together  
  • ICD-9-CM 14,000 terms  
  • ICD-10-CM 68,000 terms |
| Used directly by clinicians during process of care | Used by coding professionals after episode of care |
| More clinician friendly language | Not all terms are clinician friendly and some have little clinical relevance |
| Terms reflecting any level of granularity appropriate for situation |  
  • Can include awkward terminology due to embedded coding guidelines  
  • Presumes knowledge of coding rules  
  • Dictates level of granularity (NOS, NEC) |
| Flexible data retrieval organized in multiple hierarchies | |

Fung, KW. NLM, NIH. 2010. How SNOMED CT can help in the ICD-10-CM transition. AHIMA.
## Examples

<table>
<thead>
<tr>
<th>Condition</th>
<th>ICD-9</th>
<th>ICD-10</th>
<th>SNOMED CT®</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asperger’s Disorder</td>
<td>Other specified pervasive developmental disorders 299.8</td>
<td>Asperger’s disorder F84.5</td>
<td>Asperger’s Disorder 23560001</td>
</tr>
<tr>
<td>Apert Syndrome</td>
<td>Acrocephalosyndactyly 755.55</td>
<td>Congenital malformation syndromes predominantly affecting facial appearance Q87.0</td>
<td>Apert Syndrome 205258009</td>
</tr>
<tr>
<td>Metabolic acidosis</td>
<td>Acidosis 276.2</td>
<td>Acidosis 276.2</td>
<td>Metabolic acidosis 59455009</td>
</tr>
</tbody>
</table>

Source: AHIMA
INTEGRATED PROBLEM LIST - TIPS FOR A SMOOTH TRANSITION
What is a Problem List?

IHS problem list historically reflected chronic problems. POVs reflected issues addressed during each encounter.

2014 certification shifted this approach. Problem List simply describes problems that have been documented for the patient. This includes essentially all diagnoses (chronic, episodic, and issues requiring follow-up).

As a result:

IPL will represent all problems that have been documented, including episodic and administrative, and also incorporates care planning documentation.
Integrated Problem List (IPL) – New Features

• Non-redundant SNOMED-based list
  • SNOMED maps to ICD or assigns un-coded in background

• POV selection from IPL

• Used for ALL problems – chronic, episodic, sub-acute, social/environmental

• Used by ALL clinicians who document care

• Nationally vetted and released pick lists

• Care planning documentation
Integrated Problem List Display

<table>
<thead>
<tr>
<th>Status</th>
<th>Onset Date</th>
<th>Provider Narrative</th>
<th>Comments</th>
<th>PHx</th>
<th>PIP</th>
<th>IP</th>
<th>ICD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chronic</td>
<td></td>
<td>Hyperlipidemia</td>
<td>This is a test note.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chronic</td>
<td></td>
<td>Diabetes mellitus type 2</td>
<td></td>
<td>272.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Episodic</td>
<td></td>
<td>Pelvic pain</td>
<td>is a test note.</td>
<td></td>
<td>250.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub-acute</td>
<td></td>
<td>Nontraumatic rotator cuff tear</td>
<td>Patient's pain was resolved, range of motion and strength restored with 6 months of physical therapy.</td>
<td></td>
<td>789.09</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Problem Info**

- **Goal Notes**: Pain resolution, restore full ROM and strength. Patient's goal is to reach this without further surgery or injections.
- **Patient Instructions/Care Plan**: Physical therapy for 3 months. If not significantly improved OR if worsen patient agreed to additional imaging and other interventions.
- **Visit Info**: Referral to PT. Follow up in 2 weeks.
Data Migration to IPL

All data will be retained when moving data from the Problem List to the new Integrated Problem List.

The following data will change/move:

- Notes will be retained but are now called “Comments”
- Provider narratives will have leading * until the problem is updated with a SNOMED term
  - *Hypertension
  - *Osteoarthritis right knee
- Once problems are updated, they will be displayed in SNOMED term|provider text format
  - Essential Hypertension |
  - Osteoarthritis of knee | right

Statuses will be migrated to new status (see following table)
## Problem Statuses

<table>
<thead>
<tr>
<th>Current (EHRp12)</th>
<th>Migrate to (EHRp13)</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Chronic</td>
<td>Diabetes, Hypertension, Asthma</td>
</tr>
<tr>
<td>Personal History</td>
<td>Inactive</td>
<td>Inactive problem of Chicken Pox</td>
</tr>
<tr>
<td>Inactive</td>
<td>Inactive</td>
<td></td>
</tr>
</tbody>
</table>

## New Statuses

<table>
<thead>
<tr>
<th>New Statuses</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub-acute</td>
<td>Breast mass, ankle injury – something you are working up or that needs short-term follow up</td>
</tr>
<tr>
<td>Episodic</td>
<td>Cold, female UTI – disposition straightforward “follow up PRN or if not improving”</td>
</tr>
<tr>
<td>Social/Environmental</td>
<td>Homeless, lack of running water, alcoholic in home</td>
</tr>
</tbody>
</table>
Problem list prior to conversion to SNOMED

All problems after converting to SNOMED terms
Essentials for IPL

The IPL has a wide range of functionality. Most of the functionality is optional for clinicians, however, enabling staged implementation.

*Required* entry is not overwhelming, so we will begin with the *three required steps* essential in the early transition period.
Easing the Stress of the First Days

Scenario:

It is your first day of clinic after EHRp13 was installed. You have fewer patients scheduled in anticipation of the software changes.

Your first patient is here for a follow-up and has a sore throat and cold symptoms.
Update Problems

Update the problems you are addressing with the patient today.

- Note that any problem with leading * in provider narrative needs updated to SNOMED prior to use.
Step 1: Update Problems to Address Today

This is why cleaning up problem lists and having data entry assist in coding un-coded problems is helpful.

1. Highlight problem for update and click “Get SCT.”

This searches the ICD-9 to SNOMED reverse mapping tool.
Step 1: Update Problems to Address Today (cont.)

For most of your ICD coded problems, this will return a selection of SNOMED terms to choose.

2. Highlight choice and click “Select” to update the entry.

**If you have un-coded entries or codes do not reverse map, you may use Pick List or SNOMED search to update the problem.**
Step 2: Add Any New Problems Addressed Today

3. Click “Pick List.”
Step 2:
Add Any New Problems Addressed Today (cont.)

4. Select problem(s) and save.
At this point, the problems you need to select as POV and use for Clinical Indications when placing orders are updated.

**Only problems that have been updated to SNOMED are selectable on the Clinical Indication dropdown.**
Step 3: Select POV

5. Highlight the problems you managed today.
6. Click the “POV” button.
Step 3:
Select POV (cont.)

7. Click “Save” to set as POVs.
Review of the Few Required Steps

For each existing problem you will address today:
1. Highlight problem for update and click “Get SCT.” If un-coded or if does not return a SNOMED choice, you may use a Pick List or Search for a SNOMED term.
2. Highlight choice and click “Select” to update entry.

For each new issue you will address today:
3. Click “Pick List.”
4. Select problem(s) and save.

Enter Orders if needed.
Select POVs.
5. Highlight the problems you managed today.
6. Click the “POV” button.
7. Save.
Add Problem

Adding a problem

Only two fields are required to enter a problem:

• SNOMED CT
• Status – defaults to “episodic” unless it is defaulted differently in pick list

All other fields are optional.
Add Problem (cont.)

• You may select from pick list by clicking “Pick list.”
• You may search for SNOMED by entering text and clicking ellipsis (...).

![Add Problem dialog box]
Edit Problem

Edit prompts user for SNOMED if the problem has not yet been updated.

• You have additional option of using “Get SCT” option if the problem has an ICD-9 code.
Add/Edit Problem – Optional Fields

Only SNOMED Term and Status are required fields.

These optional fields may be used to add information.

Care planning is only editable if selected as POV.
Add/Edit Problem – Optional Fields (cont.)
Search Tools - Pick Lists

- Over 50 vetted SNOMED pick lists are available for import.
- Pick lists may be used as imported or customized by CAC.
- Available customizations:
  - Default status
  - Group similar pick list items together for display
  - Add/Delete terms
Pick List Example
Search Tools - “Get SCT” Reverse Mapping Tool

Allows for quick conversion from ICD-9-encoded problem to SNOMED.

- Highlight problem and click “Get SCT”.

![Image of integrated problem list with options to expand, edit, and get SCT details]
Return of “Get SCT”

Returns ICD9 to SNOMED matches. Also returns the parent (less granular) and children (more granular) of the matches from which clinicians can choose. *This does not work for un-coded diagnoses, which is why problem list cleanup is so important* . . .
If you select the **Fully Specified Name**, it will store the preferred term. Clicking “+” allows the user to view synonyms from which to choose.
**SNOMED Lookup by Synonym**

Option to search/display by synonym – also displays the fully specified name and “is a” relationship.

<table>
<thead>
<tr>
<th>Problem</th>
<th>‘is a’ relationship</th>
<th>Mapped ICD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borderline leprosy</td>
<td>Borderline leprosy (disorder)</td>
<td>030.3</td>
</tr>
<tr>
<td>Full lepromatous leprosy</td>
<td>synonym for Lepromatous leprosy (disorder)</td>
<td>030.0</td>
</tr>
<tr>
<td>Full tuberculoid leprosy</td>
<td>synonym for Tuberculoid leprosy (disorder)</td>
<td>030.1</td>
</tr>
<tr>
<td>Group B leprosy</td>
<td>synonym for Borderline leprosy (disorder)</td>
<td>030.3</td>
</tr>
<tr>
<td>Group I leprosy</td>
<td>synonym for Indeterminate leprosy (disorder)</td>
<td>030.2</td>
</tr>
<tr>
<td>Indeterminate leprosy</td>
<td>Indeterminate leprosy (disorder)</td>
<td>030.2</td>
</tr>
<tr>
<td>Lepromatous leprosy</td>
<td>Lepromatous leprosy (disorder)</td>
<td>030.0</td>
</tr>
<tr>
<td>Leprosy</td>
<td>Leprosy (disorder)</td>
<td>030.9</td>
</tr>
</tbody>
</table>
POV Selection Tool

Allows for quick selection of one or more SNOMED encoded problems

Highlight >> POV button
POV Selection Tool

- From this tool, you may simply click save and store items as POV or use any **optional fields**:
  - Add episodicity
  - Enter provider text specific to this encounter (does not store back to problem)
  - Goal notes
  - Care plan notes
  - Visit instructions
  - Patient education
  - Treatment/regimen terms
  - Change primary POV
  - Last column is display only
Changes for Data Entry/Coding Staff

• Much of process is unchanged
• No longer need to code un-coded problems
• Will still validate and assign appropriate POV ICD codes
• Provider narrative more consistent

Format: SNOMED term | provider text
Example: Essential Hypertension | uncontrolled
### IPL – Projected Progression of Usage

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Feature</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 1 – transition and updating IPL</td>
<td>Get SCT reverse mapping and pick lists</td>
<td>Updating IPL</td>
</tr>
<tr>
<td>Phase 1 – transition and updating IPL</td>
<td>POV dialog</td>
<td>Quick way to add POVs</td>
</tr>
</tbody>
</table>

**Phase 1: “Surviving the tsunami of software”**

- These quick tools allow clinicians to get through their clinical encounters with relative ease.
## IPL – Projected Progression of Usage

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Feature</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 2 – getting comfortable</td>
<td>Visit instructions on POV dialog</td>
<td>Quick way to add visit instructions. Enter once, display in PHR, print on CS, and drop into TIU note.</td>
</tr>
<tr>
<td>Phase 2 – getting comfortable</td>
<td>Patient education on POV dialog</td>
<td>Quick way to add Pt Ed</td>
</tr>
<tr>
<td>Phase 3 – optimizing documentation</td>
<td>Goal notes, care plan notes</td>
<td>Therapeutic goals and plans of care from various team members enhances communication. Displays on Clinical Summary, PHR.</td>
</tr>
<tr>
<td>Phase 3 – optimizing documentation</td>
<td>Treatment/regimen</td>
<td>Can enhance documentation of follow-up instructions, case management, protocol driven care, and nursing care</td>
</tr>
</tbody>
</table>

**Visit instructions, goals, and care planning notes display on the Clinical Summary and Transition of Care Summary and can drop into encounter documentation.**
It Takes a Village to Migrate to IPL

Recommend leveraging *all clinicians* to participate as they encounter opportunities to update in their workflow:

- Nursing example: ordering standing order labs can update problems prior to selecting as Clinical Indication.
- Pharmacy example: update problems and select as POVs for medication refills.
It Takes a Village to Migrate to IPL (cont.)

Who will assist in Problem List migration?

• It is NOT appropriate to engage non-clinician staff (clerks, coders, medical records) in the migration of the problem lists from ICD-9 to SNOMED.
Summary

- **Clean up problems now.**
- **Plan approach to problem list migration.**
- No data is lost in the migration to SNOMED.
- Problems can be updated and selected as POVs in three steps.
- Only two fields are mandatory for new problems.
- Transition tools: “Get SCT” reverse mapper and Pick Lists.
- SNOMED with mapping tools stabilizes front-end and eases the impact to clinicians with transition to ICD-10.
- Minimal change for coding; coders will have more controlled, cleaner narratives from which to code.
- Map advice will aid coders with the ICD-10 transition.
- New TIU objects allow data entered on IPL to drop into encounter notes [requires CAC configuration].
Resources

Care Planning information is at the end of the slide set for your review.

SNOMED issues – select “SNOMED (DTS) for application”
http://www.ihs.gov/rpms/index.cfm?module=Feedback

Enhancement requests – select “Electronic Health Record (EHR)” for application
http://www.ihs.gov/rpms/index.cfm?module=Feedback

ICD 10 Documentation examples
http://www.crozerkeystone.org/healthcare-professionals/icd-10-update/icd-10-documentation/
Questions?

Even good change is stressful...

It won't make EHR work any better; but if it makes you feel good
"GO FOR IT!"

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SUPPLEMENTAL INFO ON CARE PLANNING
Care Planning

Optional documentation
• Goal notes
• Care plan notes
• Visit instructions
• Patient education
• Treatment/regimen/follow-up
Care Planning (cont.)

May be accessed:
• From Add/Edit Problem dialog
• From POV selection dialog

Content populated by:
• Free text
• Site developed templates (like used in note)

Documentation can be dropped into your encounter notes using TIU objects.
## Care Planning (more)

<table>
<thead>
<tr>
<th>Field</th>
<th>Common Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit Instructions</td>
<td>Used for any problems managed during visit.</td>
</tr>
<tr>
<td></td>
<td><em>Example</em>: A1C elevated. Increase metformin. Eliminate soda and juice, opt for water. Increase walks to 30 min/day. Refer to diabetic education.</td>
</tr>
<tr>
<td>Goal Note</td>
<td>Entered when diagnose chronic, subacute, or social/environmental problem and updated periodically.</td>
</tr>
<tr>
<td></td>
<td><em>Example</em>: A1C less than (&lt;) 7</td>
</tr>
<tr>
<td>Care Plan Note</td>
<td>Entered when diagnose chronic, subacute or social/environmental problem.</td>
</tr>
<tr>
<td></td>
<td><em>Example</em>: A1C every 3 months until reach goal, then every 6 months. Yearly dilated eye exam. Lipid, nephropathy screening yearly (etc.).</td>
</tr>
</tbody>
</table>
# Care Planning

<table>
<thead>
<tr>
<th>Field</th>
<th>Common Usage</th>
</tr>
</thead>
</table>
| Treatment/Regimen/ Follow up  | Interventions, treatments, follow up that may be selected
                     Examples: Follow up in 3 weeks, treatment adjusted per protocol                                                             |
| Patient Education             | May store subtopics for problem:                                                                                                           |
|                               | • Disease Process                                                                                                                                 |
|                               | • Exercise                                                                                                                                 |
|                               | • Lifestyle Adaptation                                                                                                                      |
|                               | • Medications                                                                                                                               |
|                               | • Nutrition                                                                                                                                |
|                               | • Prevention                                                                                                                                |
Care Planning - From Add/Edit Dialog
Care Planning - From Add/Edit Dialog (cont.)
Care Planning - From POV Dialog

- Screen showing a POV dialog with options for conditions like Asthma and Diabetes mellitus.
- A pop-up Goal Note: "Note that the template icon is available in the right lower corner."
Templates for Goals, Care Planning, and Visit Instructions

Note the template icon in the lower right corner. Click to expose template option.
## Care Plan View

### Integrated Problem List

<table>
<thead>
<tr>
<th>Status</th>
<th>Onset Date</th>
<th>Provider Narrative</th>
<th>Comments</th>
<th>PHx</th>
<th>PIP</th>
<th>IP</th>
<th>ICD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chronic</td>
<td>Hyperlipidemia</td>
<td>This is a test note</td>
<td></td>
<td>272.4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chronic</td>
<td>Diabetes mellitus type 2</td>
<td></td>
<td></td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Episodic</td>
<td>Pelvic pain</td>
<td></td>
<td></td>
<td>789.09</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub-acute</td>
<td>Nontraumatic rotator cuff tear right</td>
<td>Previous nontraumatic rotator cuff tear in 2011. Patient's pain was resolved, range of motion and strength restored with 6 months of physical therapy.</td>
<td></td>
<td>727.61</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Latest PRVs

- **Goal Notes**: Pain resolution, restore full ROM and strength. Patient's goal is to reach this without further surgery or injections.
  - Modified by: RICHARDS, SUSAN P. 03/12/2014

- **Patient Instructions/Care Plan**: Physical therapy for 3 months. If not significantly improved OR if worsen patient agreed to additional imaging and other interventions.
  - Modified by: RICHARDS, SUSAN P. 03/12/2014

### Visit Info

- **Visit Instructions**: Referral to PT. Follow up in 2 weeks
  - Modified by: RICHARDS, SUSAN P. 03/12/2014

### Care Plan Activities

- **Well woman health examination**: 9999
Care Planning

- Care planning is signed and secure.
- Care planning notes are logically deleted, leaving an audit trail.
- Problems with care planning documentation cannot be deleted, only inactivated.
Treatment/Regimen

- Currently contains some data points for clinical quality measures
- Will be pared down for release
- Will welcome some field input through RPMS feedback for relevant additions
IPL – Care Planning Considerations

Use of goal notes, care plan notes, visit instructions enhanced by TIU templates
  • Consider local committee to work with CAC on development

Review tools and consider drafting guidance around care planning documentation.
  • Who should document
  • Appropriateness of content
  • When to delete notes
  • When to inactivate notes
TIU Object “Active Problems w/o Dates”
Displays problems marked as chronic

Chronic Problems:
Obesity | Can add clarification
Chronic otitis externa | right
Diabetes mellitus type 2 |
Asthma |
Lactocele | This is a test
Abnormal findings diagnostic imaging heart+coronary circulat |
Closed fracture of proximal ulna, comminuted | left, traumatic acute, swelling and hematoma at site
TIU Object "V Problem List"

Displays problems selected as POV for current visit and visit instructions

- Problem: PCOS - Polycystic ovarian syndrome
  - Mapped ICD: 256.4
  - Status: CHRONIC
  - Instruction Date: 3/12/2014 @ 12:51:21
  - Signed by:
  - instructions:
    - Test instruction

- Problem: Well woman health examination
  - Mapped ICD: 9999
  - Status: EPISODIC

- Problem: Nontraumatic rotator cuff tear - right
  - Mapped ICD: 727.61
  - Status: SUB-ACUTE

- Problem: Pelvic pain - muscle pain, equisitely tender left obturator internis
  - Mapped ICD: 789.09
  - Status: EPISODIC
  - Instruction Date: 3/12/2014 @ 17:53:40
  - Signed by: RICHARDS, SUSAN P
  - instructions:
    - Referral to pelvic PT. Use vaginal muscle relaxers at night as needed.