



RESOURCE AND PATIENT MANAGEMENT SYSTEM

# **iCare: A Population Management Tool**

## Announcement and Agenda

FY 2015

Office of Information Technology (OIT)  
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## 1.0 General Information

### 1.1 Purpose of Training

This is an intensive three day hands-on training on the iCare software. iCare is a Population Management software tool that helps health care providers efficiently manage the care of their patients. When utilized in conjunction with the RPMS Electronic Health Record (EHR), iCare provides a comprehensive view of patient information. This provides staff, clinics and sites with valuable information that enhances the clinical decision making experience. The purpose of this training activity is to provide healthcare personnel with the basic knowledge and skills to utilize iCare to manage the care of their patients more efficiently and to improve Patient Outcomes.

#### 1.1.1 Participants will:

- Summarize common features of iCare
- Utilize iCare to identify and manage groups of patients
- Utilize iCare CMET functionality to electronically track and manage patient events
- Analyze Meaningful Use (MU) Stage 2 Performance and Clinical Quality Measures
- Utilize iCare IPC functionality to optimize the IPC workflow
- Utilize iCare to identify patient care needs and unmet performance measures
- Utilize iCare to meet Stage 2 Meaningful Use Objectives for patient lists and reminder notifications

#### 1.1.2 Hands-on practice includes, but is not limited to:

- Creating iCare panels based on a variety of clinical scenarios and exercises
- Setting up user preferences, iCare site parameters, and user access
- Creating multiple layout templates
- Entering and editing patient data in the patient record
- Identifying patient care needs for populations and individual patients
- Identifying unmet performance and meaningful use measures
- Creating IPC Microsystems
- Tracking CMET events

- Documenting Reminder Notifications per communication preference

The training consists of lecture with PowerPoint presentations, demonstration of the tool, and hands-on exercises using individual computer terminals and a training database.

## 1.2 Prerequisites

None

## 1.3 Intended Audience

Physicians, Nurses, Dentists, Pharmacists, Registered Dieticians, Therapists, Clinical Application Coordinators, GPRA, IPC, and MU Coordinators, Case Managers, Medical Records, and Health Informaticists

## 1.4 Course Material and References

### 1.4.1 At the IHS RPMS FTP Site

The following materials may be downloaded from the RPMS Training FTP site at: <ftp://ftp.ihs.gov/pubs/rpms-training/iCare/>

- Course Agenda (this document)
- PowerPoint Presentations, Day 1, Day 2, and Day 3
- iCare Exercises
- CMET Exercises

The following iCare recordings may be viewed from Adobe connect at: <http://ihs.adobeconnect.com/r6yazmoz1gm>

### 1.4.2 At the IHS RPMS Website

- iCare User Manual Version 2.2 This is the main manual. ([http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi\\_022u.pdf](http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_022u.pdf) )
- The updated supplemental manuals for iCare v.2.3. Patch 4 were released with all the MU2 upgrades for the 2014 Certified EHR. They are available at [ftp://ftp.ihs.gov/RPMS/patches/MU2\\_RELEASEDOCS.ZIP](ftp://ftp.ihs.gov/RPMS/patches/MU2_RELEASEDOCS.ZIP) . All BQI pdf documents are iCare. .

## 2.0 Learning Objectives

1. Use case scenarios and population management techniques to define populations of patients and create user-defined patient panels with customized layouts and views.
2. Create patient lists and reminder notifications for Meaningful Use Stage 2.
3. Describe the iCare setup, user access set-up, user preference set-up, site parameters set-up, and taxonomy maintenance.
4. Navigate the tabs on Main window, Panel view, and Patient Record views using iCare and Microsoft Windows-based tools to review, sort, filter, export, add, and edit patient and population clinical data.
5. Track progress toward meeting Meaningful Use Performance and Clinical Quality Measures for Eligible Providers and Hospitals/CAH.
6. Highlight the status of key clinical reminders and quality performance measures for populations and individual patients.
7. Track and manage CMET events.
8. Optimize IPC workflow.
9. Utilize iCare to meet Stage 2 Meaningful Use Objectives for patient lists and reminder notifications.

## 3.0 Detailed Agenda

### 3.1 Day 1

| Topic  | Duration |
|--|----------|
| <b>Welcome:</b> <ul style="list-style-type: none"> <li>• Introductions</li> <li>• Pre-test</li> <li>• Day One Learning Objectives, Agenda, Training Materials</li> <li>• Identify Participant Needs and Expectations</li> </ul>  | 45 min.  |
| <b>iCare Overview:</b> <ul style="list-style-type: none"> <li>• Current Features</li> </ul>  | 30 min.  |
| <b>Getting Started (Demo and Hands-On)</b> <ul style="list-style-type: none"> <li>• Initial Log-in</li> <li>• User Preference Wizard</li> </ul>  | 15 min   |
| <b>Break</b>   | 15 min.  |
| <b>Creating Patient Panels (Demo and Hands-on):</b> <ul style="list-style-type: none"> <li>• Define Populations Using iCare Search Options and Filters</li> <li>• Customize Panel Layouts</li> <li>• Share and Auto-Repopulate</li> <li>• Create Panels-Hands-on Exercises: <ul style="list-style-type: none"> <li>– 1: Panel of Patients <math>\geq</math> 65 Years Old to Review Immunization Status</li> <li>– 2: Panel of Patients Assigned to a DPCP</li> <li>– 3: Panel of Diabetic Patients Seen 2x in the Last Year</li> </ul> </li> </ul> | 75 min.  |
| <b>Lunch</b>   | 60 min.  |
| <b>Cont. Creating Patient Panels (Demo and Hands-on):</b> <ul style="list-style-type: none"> <li>• Exercises: <ul style="list-style-type: none"> <li>– 4: Panel of Patients not assigned to a DPCP</li> <li>– 5: Panel of Patients with Scheduled Appointments</li> <li>– 6: Create Layout Templates</li> </ul> </li> </ul>  | 120 min. |
| <b>Break</b>   | 15 min.  |
| <ul style="list-style-type: none"> <li>• Exercises (cont.) <ul style="list-style-type: none"> <li>– 7: Modify Panel Layouts</li> <li>– 8: Mail Merge</li> </ul> </li> </ul>  | 30 min.  |
| <b>Modify User Preferences (Demo and Hands-on):</b> <ul style="list-style-type: none"> <li>• Define My Patients</li> <li>• Set up Flags and Community Alerts</li> <li>• Select Patient Record and Startup Views</li> <li>• Exercise: <ul style="list-style-type: none"> <li>– 9: Modify User Preferences</li> </ul> </li> </ul>  | 30 min.  |
| <b>Review, Questions, and Adjourn</b>  | 15 min.  |

## 3.2 Day 2

| Topic   | Duration |
|---|----------|
| <b>Day Two Overview:</b> <ul style="list-style-type: none"> <li>• Day One Review and Discussion</li> <li>• Day Two Learning Objectives and Agenda</li> </ul>  | 60 min.  |
| <b>Navigate the Main Window Tabs (Demo and Hands-on):</b> <ul style="list-style-type: none"> <li>• View Main View Tabs, Menus, Tools, Function Buttons</li> <li>• iCare Glossaries</li> <li>• Exercise:10 <ul style="list-style-type: none"> <li>– 10: Navigate the Main Window of iCare</li> </ul> </li> </ul>   | 30 min   |
| <b>Break</b>  | 15 min.  |
| <b>iCare Site parameters and User Access (Demo):</b> <ul style="list-style-type: none"> <li>• Site Parameters</li> <li>• iCare Package Manager, Editor, and Taxonomy Editor Access <ul style="list-style-type: none"> <li>– Taxonomy Management</li> </ul> </li> </ul> <b>Patient Lists and Reminder Notifications for Stage 2 Meaningful Use(Demo and Hands)</b> <ul style="list-style-type: none"> <li>• Exercises <ul style="list-style-type: none"> <li>• 11: Panel of Patients for Reminder Notifications</li> <li>• 12: Panel of Patients with Abnormal Lab Results</li> </ul> </li> </ul> <b>Care Management Tab-Asthma, Employees, Immunizations</b><br>Exercises: <ul style="list-style-type: none"> <li>– 13: Panel of Asthmatic Patients with No allergy Assessment-Review Asthma Medication Regimen</li> <li>– 14: Adolescent panel to review Immunizations</li> <li>– 15. Employee Health Panel</li> </ul> | 105 min. |
| <b>Lunch</b>  | 60 min.  |
| <b>Navigate the Patient Record (Demo and Hands-on):</b> <ul style="list-style-type: none"> <li>• Navigate Patient Record Tabs and Fields</li> <li>• Edit Demographic, Reproductive, and Family History Data</li> <li>• Edit DPCP Providers</li> <li>• Display Summary and Supplement Reports</li> <li>• Enter Historical Event PCC Data</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 16:Add a TIU note</li> <li>– 17: Add a Historical Event</li> <li>– 18: Add Demographic Data</li> <li>– 19: Edit Diagnostic Tags</li> </ul> </li> </ul>   | 90 min.  |
| <b>Break</b>  | 15 min.  |

| Topic   | Duration |
|---|----------|
| <b>Finish Independent Exercises/Scenarios</b> <ul style="list-style-type: none"> <li>• Exercises <ul style="list-style-type: none"> <li>– 20: Panel of Diabetic Patients Lost to Follow-up</li> <li>– 21: Panel of Patients with Medication Allergy</li> <li>– 22: Panel of Prenatal Patients</li> <li>– 23: Panel of Diabetic Patients with no Retinal Evaluation last year</li> <li>– 24: Panel of Patients admitted to ER or hospital (Optional exercise)</li> </ul> </li> <li>• Participant-led Discussion on Populations to Identify and Manage</li> </ul> | 75 min.  |
| <b>Review, Questions, and Adjourn</b>   | 15 min.  |

### 3.3 Day 3

| Topic  | Duration |
|--|----------|
| <b>Day Three Overview:</b> <ul style="list-style-type: none"> <li>• Day One and Two Review and Questions</li> <li>• Day Three Learning Objectives and Agenda</li> </ul>  | 45 min.  |
| <b>Meaningful Use (Demo and Hands-on):</b> <ul style="list-style-type: none"> <li>• MU Performance and Clinical Quality Measures</li> <li>• MU Optional Filters</li> <li>• MU Site Parameters and User Preferences</li> <li>• CQM-Provider reports</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 25: MU CQ Measures</li> <li>– 26: Identify Patients Missing MU Data</li> </ul> </li> </ul> | 45 min.  |
| <b>Break</b>   | 15 min.  |
| <ul style="list-style-type: none"> <li>• <b>Improving Patient Care (Demo)</b></li> <li>• IPC Main View Tab</li> <li>• IPC Panels</li> <li>• IPC Site Parameters and User Preferences</li> <li>• IPC Data Collection and Monthly Reports</li> </ul>   | 60 min.  |
| <b>CMET Overview:</b> <ul style="list-style-type: none"> <li>• CMET Pre-defined Events-Data Mining</li> <li>• CMET Workflow</li> <li>• CMET Views</li> </ul>   | 30 min.  |
| <b>Lunch</b>   | 60 min.  |
| <b>CMET Patient Record (Demo and Hands-on):</b> <ul style="list-style-type: none"> <li>• Queued Events, Tracked Events, Follow-Up Events, and Past Events</li> <li>• CMET Worksheet</li> <li>• CMET Reminders</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 1: Tracking a CMET Event in the Patient Record</li> <li>– 2: Reopen a Closed Event</li> </ul> </li> </ul>                       | 60 min.  |
| <b>Break</b>   | 15 min.  |

| Topic  | Duration |
|--|----------|
| <p><b>CMET Panel View-Managing CMET Events for a Population:</b></p> <ul style="list-style-type: none"> <li>• CMET Sub-Tabs Queued Events, Tracked Events, and Follow-up Events</li> <li>• CMET Site Parameters and User Preferences</li> <li>• CMET and Reminders Tab Layouts</li> <li>• Batch Processing</li> <li>• Working with Columns to Sort and Filter CMET Data</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 3: Batch Process Normal Mammogram and Pap Smears</li> <li>– 4: Select CMET in User Preferences</li> </ul> </li> </ul> | 60 min.  |
| <p><b>CMET Main View-Managing CMET events for a site:</b></p> <ul style="list-style-type: none"> <li>• CMET Queued Events, Tracked Events, and Follow-up Events</li> <li>• Optional CMET Filters</li> <li>• Exercises: <ul style="list-style-type: none"> <li>– 5: Utilize CMET Filters to manage CMET events at the site-level</li> <li>– 6: Identify Patients Needing Additional Breast Imaging</li> </ul> </li> </ul>   | 45 min.  |
| <p><b>Course Wrap-Up:</b></p> <ul style="list-style-type: none"> <li>• Questions</li> <li>• Post-test</li> <li>• Post Course Evaluation</li> </ul>   | 15 min.  |