RESOURCE AND PATIENT MANAGEMENT SYSTEM

iCare: A Population Management Tool

Announcement and Agenda

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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 1 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

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

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 Presentation
- iCare Exercises
- CMET Exercises

1.4.2 At the IHS RPMS Website

- iCare User Manual Version 2.2 (http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_022u.pdf)
- Version 2.3 Supplemental User Guide for Basic Functionality Enhancements (http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_023u_enhance.pdf)
- Version 2.3 Supplemental User Guide for Improving Patient Care (http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_023u_ipc.pdf)
- Version 2.3 Supplemental User Guide for Meaningful Use (http://www.ihs.gov/RPMS/PackageDocs/BQI/bqi_023u_mu.pdf)

If a web link fails to open the document, browse to: http://www.ihs.gov/RPMS/index.cfm?module=Applications&option=View&AC_ID=0 and select the **iCare Population Management GUI (BQI)** option to locate the newest version.

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. Describe the iCare setup, user access set-up, user preference set-up, site parameters set-up, and taxonomy maintenance.
3. 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.
4. Track progress toward meeting Meaningful Use Performance and Clinical Quality Measures for Eligible Providers and Hospitals/CAH.
5. Highlight the status of key clinical reminders and quality performance measures for populations and individual patients.
6. Track and manage CMET events.
7. Optimize IPC workflow.
8. Identify practical uses of iCare.

3.0 Detailed Agenda

3.1 Day 1

Topic	Duration
Welcome: • Introductions • Pre-test • Day One Learning Objectives, Agenda, Training Materials • Identify Participant Needs and Expectations	30 min.
iCare Overview: • Current Features	30 min.
Getting Started (Demo and Hands-on): • Initial Log-in • User Preference Wizard • Community Alerts • Exercise 1: Create a Community Alert Detail Panel	30 min.
Break	15 min.
Creating Patient Panels (Demo and Hands-on): • Define Populations Using iCare Search Options and Filters • Customize Panel Layouts • Share and Auto-Repopulate Identify Patient Care Needs • Identify Unmet Performance Measures and Screenings that are Due • Create Panels-Hands-on Exercises: – 2: Panel of Patients ≥ 65 Years Old to Review Immunization Status – 3: Panel of Patients Assigned to a DPCP – 4: Panel of Diabetic Patients Assigned to a DPCP - Identify Patients that Need a Diabetic Foot Exam – 5: Panel of Asthmatic Patients (1-19 Years Old) - Review Asthma Medication Regimen – 6: Panel of Patients with Scheduled Appointments in Women's Health Screening (70) - Previsit Planning	90 min.
Lunch	60 min.
Cont. Creating Patient Panels (Demo and Hands-on): • Exercises: – 7: Create Layout Templates – 8: Panel of Patients Without a DPCP – 9: Share a Panel – 10: Repopulating Panels – 11: Mail Merge – 12: Modify a Panel Layout – 13: Medications Contraindicated for Elder Population – 14: Panel of Female Patients Between 21-64 Years Old Without Current Pap Smear – 15: Panel of Patients with Medication Allergies – 16: Panel of Prenatal Patients	120 min.

Topic	Duration
Break	15 min.
Modify User Preferences (Demo and Hands-on): • Define My Patients • Set up Flags and Community Alerts • Select Patient Record and Startup Views • Exercise: – 17: Modify User Preferences	45 min.
Navigate the Main Window Tabs (Demo and Hands-on): • View Main View Tabs, Menus, Tools, Function Buttons • iCare Resources • iCare Site Parameters • Exercise: – 18: Navigate the Main Window of iCare	75 min.
Review, Questions, and Adjourn	15 min.

3.2 Day 2

Topic	Duration
Day Two Overview: • Day One Review and Questions • Day Two Learning Objectives and Agenda	30 min.
Navigate the Panel View (Demo and Hands-on): • View Panel View Tabs, menu options, toolbars, and function buttons • Care Management Tab-Asthma, Employees, HIV/AIDS • Exercises: – 19: Panel of Diabetic Patients Lost to Follow-up – 20: Panel of Patients on Warfarin Therapy-Lab Monitoring	60 min.
Break	15 min.
Cont. Navigating the Panel View (Demo and Hands-on): • Exercises – 21: Panel of Employees who need the Flu Vaccination – 22: Panel of Patients Infected with HIV – 23: Edit Diagnostic Tags	90 min.
Lunch	60 min.
Assign User Access (Demo): • iCare Package Manager, Editor, and Taxonomy Editor • Taxonomy Management	30 min.

Topic	Duration
Navigate the Patient Record (Demo and Hands-on): • Navigate Patient Record Tabs and Fields • Edit Demographic, Reproductive, and Family History Data • Edit DPCP Providers • Display Summary and Supplement Reports • Enter Historical Event PCC Data • Exercises: – 24: Quick Patient Search – 25: Add a TIU Note – 26: Add a Historical Event – 27: Add Demographic Data	75 min.
Break	15 min.
Finish Independent Exercises/Scenarios • Exercise: – 28: Elders Panel National Measures • Participant-led Discussion on Populations to Identify and Manage	90 min.
Review, Questions, and Adjourn	15 min.

3.3 Day 3

Topic	Duration
Day Three Overview: • Day One and Two Review and Questions • Day Three Learning Objectives and Agenda	15 min.
Meaningful Use (Demo and Hands-on): • MU Performance and Clinical Quality Measures • MU Site Parameters Set-up • Exercises: – 29: MU CQ Measures – 30: Identify Patients Missing MU Data	60 min.
Break	15 min.
• **Improving Patient Care (Demo and Hands-on):** • IPC Microsystems • IPC Views • IPC Site Parameters • Optional Exercises	60 min.
CMET Overview: • CMET Pre-defined Events-Data Mining • CMET Workflow • CMET Views	45 min.
Lunch	60 min.

Topic	Duration
CMET Patient Record (Demo and Hands-on): • Queued Events, Tracked Events, Follow-Up Events, and Past Events • CMET Worksheet • CMET Reminders • Exercises: – 1: Tracking a CMET Event in the Patient Record – 2: Reopen a Closed Event	75 min.
Break	15 min.
CMET Panel View-Managing CMET Events for a Population: • CMET Sub-Tabs Queued Events, Tracked Events, and Follow-up Events • CMET Site Parameters and User Preferences • Customize CMET and Reminders Layouts • Batch Processing • Working with Columns to Sort and Filter CMET Data • Exercises: – 3: Batch Process Normal Mammogram and Pap Smears – 4: Create CMET Filters for CMET Sub-tabs in User Preferences	90 min.
CMET Main View-Managing CMET events for a site: • CMET Queued Events, Tracked Events, and Follow-up Events • Exercises: – 5: Display Events in the Main View Using Optional CMET Filters – 6: Create a Panel of Patients Needing Follow-up Mammogram Screening	45 min.
Course Wrap-Up: • Questions • Post-test • Post Course Evaluation	15 min.