

# The Fab Four

Reminders, Dialogs and a  
Working Process

# Objectives

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- Look at issues occurring at Choctaw Nation with Health Factors & exams
- Discuss Four Relevant Reminders
- Demonstrate applicable Dialogs
- Walk through process for staff to accomplish necessary documentation
- Show improvement in quality of care

# The Old Way

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- ◉ Nurse relied on paper forms for questions
- ◉ Questions were lost on paper from copying process
- ◉ Different processes at different sites
- ◉ Patients frustrated by being asked same questions each visit
- ◉ Nurse had to go to Wellness tab and look for last instance of documentation to know if HF or exam needed to be done again
- ◉ Tremendous amount of unnecessary documentation

## Multiple, Non-necessary documentation



### Health Factors

Visit Date	Health Factor	Category	Comment
01/11/2010	Current Smoker, Status Unknown	Tobacco	
01/12/2009	Current Smoker, Status Unknown	Tobacco	2 PKS PER DAY
10/15/2008	Current Smoker, Status Unknown	Tobacco	2-2 1/2 PPD
06/25/2008	Current Smoker, Status Unknown	Tobacco	
09/07/2007	Current Smoker, Status Unknown	Tobacco	
06/04/2007	Current Smoker, Status Unknown	Tobacco	
05/01/2007	Current Smoker, Status Unknown	Tobacco	
04/24/2007	Current Smoker, Status Unknown	Tobacco	
03/07/2007	Current Smoker, Status Unknown	Tobacco	
02/28/2007	Current Smoker, Status Unknown	Tobacco	
02/28/2007	Current Smoker, Status Unknown	Tobacco	
01/30/2007	Current Smoker, Status Unknown	Tobacco	
01/23/2007	Current Smoker, Status Unknown	Tobacco	
01/04/2007	Current Smoker, Status Unknown	Tobacco	
11/28/2006	Current Smoker, Status Unknown	Tobacco	
10/26/2006	Current Smoker, Status Unknown	Tobacco	
08/21/2006	Current Smoker, Status Unknown	Tobacco	
07/24/2006	Current Smoker, Status Unknown	Tobacco	
04/20/2006	Current Smoker, Status Unknown	Tobacco	
01/12/2006	Current Smoker, Status Unknown	Tobacco	
00/23/2005	Current Smoker, Status Unknown	Tobacco	

This was  
printed on  
back of another  
form and often  
was missed  
when forms  
were recopied

#### **CAGE ALCOHOL SCREENING TOOL**

Do you ever drink alcohol (ETOH)? **Yes/No**

**Note:** If this answer is **No**, A, B, & C equal "0"  
and remaining answers are **No**.

**A.** On Average, how many days a week do you  
Drink alcohol (ETOH)? \_\_\_\_\_

**B.** On a typical day when you drink, how many  
Drinks do you have? \_\_\_\_\_

**C.** What is the maximum number of drinks you  
have had on any occasion in the last month?  
\_\_\_\_\_

Have you ever felt you should cut down on  
your drinking? **Yes/No**

Have people annoyed you by criticizing your  
drinking? **Yes/No**

Have you ever felt bad or guilty about drinking?  
**Yes/No**

Have you ever had a drink first thing in the  
morning to steady your nerves or to get rid of a  
hangover (i.e. as an eye opener)?

**Yes/No**

**Must be Completed Annually**

# SO, a decision was made

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- 1) To look at other ways to document necessary data.
- 2) To decrease time nursing spends on computer and therefore increasing time spent patient.
- 3) Also look at what can be done to show if patient needs any HF or exam documentation?

# Four Indicators of Care

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- ① 1) Alcohol/CAGE = HF
  - ② 2) Depression = Exam
  - ③ 3) DV/IPV = Exam
  - ④ 4) Tobacco Use = HF
- 
- ⑤ Or also known as the  
Fab Four

# What are Clinical (EHR) Reminders?

- “The Clinical Reminders system allows caregivers to track and improve preventive healthcare and disease treatment for patients and to ensure that timely clinical interventions are initiated.” (VA Vista Website)

## ***Simple terms:***

*Clinical Reminders does chart reviews for you and tells you what the patient needs*



# Where are Clinical (EHR) Reminders?

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They are visible from 4 places in EHR

- 1) “Alarm clock” icon on the toolbar
- 2) Cover sheet Display- Due Reminders
- 3) Reminders “Drawer” on Notes Tab
- 4) Can be set up as Health Summary Reports

# What am I going to Use?

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- A National Reminder that can be imported from the Reminder Exchange
- Or a customized local reminder
- \* We chose to locally customize reminders for our system

```
+-----Entry-----Source-----Date Packed-----
2 IHS-ALCOHOL SCREEN 2009 HAGER@DEMO HOSPITA 02/04/2010@10:17:15
3 IHS-ALLERGY HAGER@DEMO HOSPITA 08/28/2008@11:37:45
4 IHS-ASTHMA ACTION PLAN 2009 HAGER@DEMO HOSPITA
5 IHS-ASTHMA CONTROL 2009 HAGER@DEMO HOSPITA 02/04/2010@10:17:54
6 IHS-ASTHMA PRIM PROV 2009 HAGER@DEMO HOSPITA 02/04/2010@10:18:13
8 IHS-ASTHMA SEVERITY 2009 HAGER@DEMO HOSPITA 02/04/2010@10:18:53
9 IHS-ASTHMA STEROID 2009 HAGER@DEMO HOSPITA 02/04/2010@10:19:11
10 IHS-BLOOD PRESSURE HAGER@DEMO HOSPITA 08/28/2008@11:42:38
11 IHS-COLON CANCER 2007 HAGER@DEMO HOSPITA 08/28/2008@11:42:51
+-----+ Next Screen - Prev Screen ?? More Actions-----
CFE Create Exchange File Entry IH Installation History
CHF Create Host File LHF Load Host File
CMM Create MailMan Message LMM Load MailMan Message
DFE Delete Exchange File Entry LR List Reminder Definitions
IFE Install Exchange File Entry RI Reminder Definition Inquiry
Select Action: Next Screen//
```

# For ANY Reminder

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- There should be a group or team from your site to discuss as to what the reminder needs to look for (cohort) and what will resolve the reminder
- This team needs to be multi-departmental and members may change based on a particular reminder being reviewed

Multiple Resources should be used to determine logic of your reminder(s)

- 1) The IHS RPMS GPRA/CRS Clinical Performance Measure Logic Manual is an invaluable source of information
- 2) If the Reminder is associated with diabetes- one should contact staff that know the American Diabetes Association standards or Diabetic Audit
- 3) If your site has any Grants or Special Projects- those groups must be included with discussions
- 4) Pap Smear Reminders- may want to customize to ACOG standards
- 5) Currently practiced standards/policies may be utilized

The Reminder should be broad enough to meet all needs

# CNHSA Alcohol Screen

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- REMINDER DUE if patient over 15  
AND no alcohol screening or alcohol  
related diagnosis in the past year

What resolves it- CAGE Health Factor  
or Alcohol exam in last year or if  
patient has had alcohol diagnosis in  
last year.

# CNHSA Depression Screen

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- REMINDER DUE if over 18 OR any age if pt had dx of DM or Heart disease AND no depression screening or dx of depression in the last year

What resolves- Depression exam or if patient has had a diagnosis of depression in last year

# CNHSA IPV/DV Screen

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- REMINDER DUE if patient over 15  
AND No screening for domestic  
violence done in the past year

What resolves- an Intimate Partner  
Violence exam in last year



# CNHSA Tobacco USE Screen

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- REMINDER DUE if patient over 15  
AND no tobacco screening in the  
past year

What resolves- Tobacco Health Factor  
or tobacco screening ICD codes  
example- V15.82

# CNHSA Ped Tobacco Screen

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- REMINDER DUE if patient 1 day to 14 years old AND no tobacco screening in the past year

What resolves- Tobacco Health Factors  
Especially “Smoke Free Home” or  
“Smoker in Home”

# CNHSA Tobacco Education

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- REMINDER DUE if patient over 15 AND who are current or cessation smokers (HF or by POV) in last 2 years need tobacco education documented.

What resolves- Specific Tobacco education topics

So that's a few of our Reminders,  
but how can we easily resolve them

Remember : we want to document all necessary information  
but make the process the most convenient for staff

The screenshot shows the IHS EHR interface for patient COX, TRACIE D. The window title is "IHS EHR COX, TRACIE D". The top menu bar includes "User", "Patient", "Tools", "Help", "REFRESH", "CLEAR", "OPEN", "eSig", "Dosing Calculator", "Community Alerts", and "IMAGING". Below the menu bar are tabs for "Privacy", "Chart", "Resources", "RPMS", "Communications", "BEH 4.0", and "Suicide Form". The "Chart" tab is active, showing a patient summary for "Demo, Patient Old" (999994, 01-Jan-1945 (66), M). The summary includes a "CAT-PO" status, the patient name "COX, TRACIE D", and a date/time stamp "21-Mar-2011 10:21" with the location "Ambulatory". To the right of the summary are buttons for "Pharm Ed", "DEMO/INS INFO", "Postings", and "CA". Below the summary are tabs for "Notifications", "Cover Sheet", "Triage", "Meds", "Labs", "Notes", "Prob/POV", "Services", "Orders", "Reports", "Wellness", "Immunizations", "D/C Sum", "Consults", "Activity", and "Well Child".

RED = Due

BLUE = Your through

White = Not applicable (rarely seen)

# What are Clinical Reminder Dialogs?

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- Clinical Reminder Dialogs facilitate documentation
  - They look like a Template
  - Resolve the reminder by entering data into EHR/PCC such as education, HF, exams
  - Document in the note

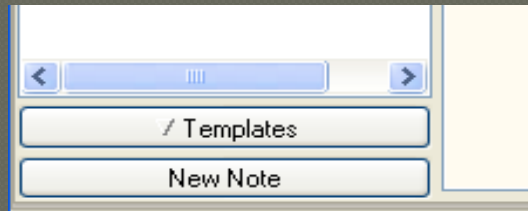
... all at the same time!!!
- They can also order
  - Meds , Labs, Consults
- Support treatment algorithms

# Process for Screening

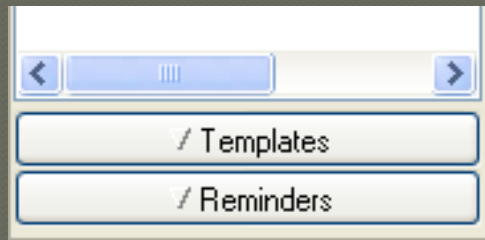
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- Patient/visit; enter vitals
- Enter Chief Complaint
- Review or enter Yearly Self Assessment Note
- Look at Reminders clock- if red, something due, if blue –you are through
- If Red- open Reminders drawer and address needs

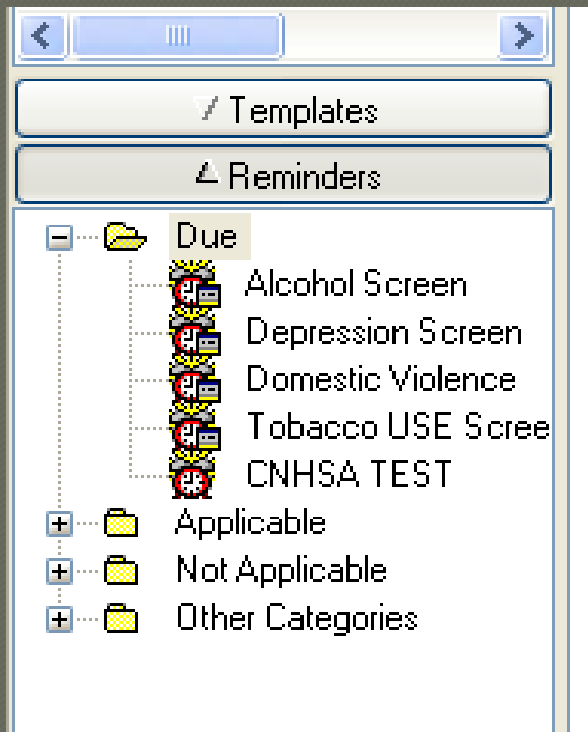
NOTES TAB- what was :



Becomes : after you have chosen a note title



# WHEN drawer opened:



Therefore click on Reminder due:  
and appropriate dialog pops up



Reminder Resolution: Alcohol Screen

Last CAGE or alcohol screen in computer: No ALCOHOL/DRUG health factors found for patient Last alcohol screen: None Found

The CAGE assessment consists of asking the patient the following questions:

CAGE QUESTIONS

- ☐ Patient admits to having felt the need to Cut down on drinking.
- ☐ Patient admits to feeling Annoyed by other's criticism of drinking.
- ☐ Patient admits to feeling bad or Guilty about drinking.
- ☐ Patient admits to having had an "Eye opener" in the morning.

If patient denies alcohol usage, score = 0/4. If patient admits to alcohol usage, then score is based on number of questions answered - yes. (EX- if 2 questions answered yes then score = 2/4)

Record CAGE Score

CAGE SCORES

- ☐ CAGE 0/4
- ☐ CAGE 1/4
- ☐ CAGE 2/4
- ☐ CAGE 3/4
- ☐ CAGE 4/4

SCORING: 2 or 3 affirmative answers should create a hight index of suspicion. 4 affirmative answers indicate alcoholism.

☒ Check to indicate alcohol education done at this visit

- ☐ The patient/family was educated about the connection between alcohol or drug use and physical injury.
- ☐ Educated about the dangers of alcohol/drug addiction
- ☐ Given literature about alcohol/drug use
- ☐ Educated about alcohol and drug addiction being treatable chronic conditions
- ☐ Educated about the disease of alcohol/drug addiction
- ☐ Education on the complications of alcohol/drug addiction

☒ Click here to document any substance abuse screening.

- ☐ Substance abuse screening negative.
- ☐ Substance Abuse Screening Positive.

\* Indicates a Required Field

CLINICAL REMINDER ACTIVITY

Alcohol Screen:

Alcohol education

## What appears in note:

VISIT DATE: 03/25/11 15:04

SELF ASSESSMENT REVIEWED TODAY:

No changes indicated by patient.

### CLINICAL REMINDER ACTIVITY

#### Alcohol Screen:

Patient admits to having felt the need to Cut down on drinking.

Patient admits to feeling Annoyed by other's criticism of drinking.

CAGE 2/4

Comment: Patient drinks only on weekends

#### Alcohol education

The patient/family was educated about the connection between alcohol or drug use and physical injury.

Level of Understanding: Good

Education duration: 3

Substance abuse screening negative.

Exam Result: Normal/negative

## What appears on Wellness tab:



### Health Factors

Visit Date	Health Factor	Category	Comment
03/25/2011	Cage 2/4	Alcohol/drug	Patient drinks only on weekends
05/20/2005	Non-tobacco User	Tobacco	
05/20/2005	Never Smoked	Tobacco	
05/20/2005	Never Used Smokeless Tobacco	Tobacco	
02/17/2005	Non-tobacco User	Tobacco	
02/17/2005	Never Smoked	Tobacco	
02/17/2005	Never Used Smokeless Tobacco	Tobacco	
06/24/2004	Non-tobacco User	Tobacco	
06/24/2004	Never Smoked	Tobacco	
06/24/2004	Never Used Smokeless Tobacco	Tobacco	



### Exams

Visit Date	Exams	Result	Comments	Provider	Location
03/25/2011	ALCOHOL SCREENING	NORMAL/NEGATIVE		COX,TRACIE D	CHOCTAW NATION HOSPITAL
05/20/2005	INTIMATE PARTNER VIOLENCE		HEALTH FACTOR DOME VIOLENCE-NEVER		CHOCTAW NATION HOSPITAL
02/17/2005	INTIMATE PARTNER VIOLENCE		HEALTH FACTOR DOM VIO-NEVER		CHOCTAW NATION HOSPITAL



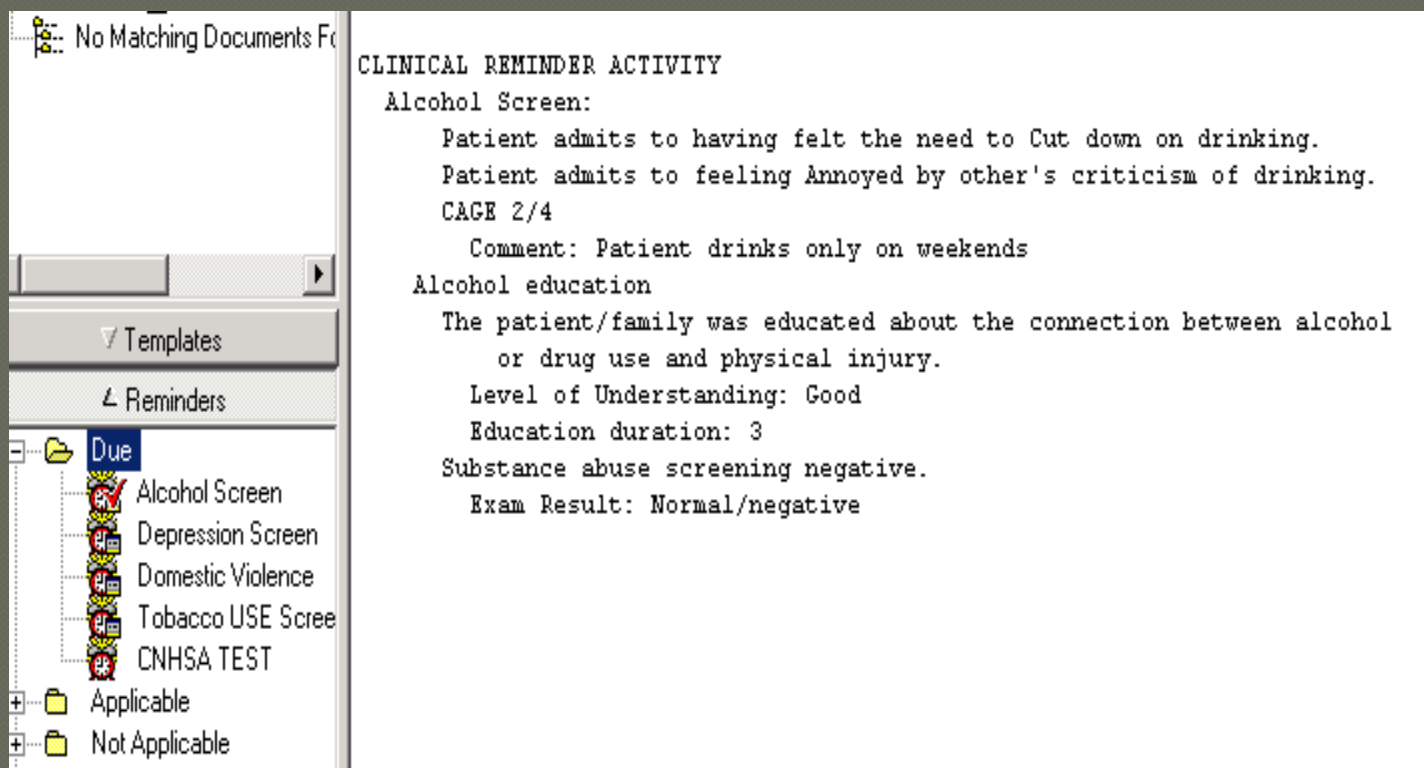
### Education



Show Standard

Visit Date▼	Education Topic	Comprehension	Readiness To Learn	Status	Objectives	Comment	Provider	Length	Type
03/25/2011	Alcohol And Other Drugs-Injuries	GOOD					COX,TRACIE D	3	Individual
01/27/2011	Coronary Artery Disease-Lifestyle Adaptations	FAIR					DUFF,CHRISTOPHER M DPH	15	Individual
12/15/2010	Diabetes Curriculum Education-Foot Care	GOOD	RECEPTIVE				GRIFFIN,LEE ANN RN CDE		Individual
12/15/2010	Tobacco Use-Quit	GOOD	RECEPTIVE				GRIFFIN,LEE ANN RN CDE		Individual
11/02/2010	Tobacco Use-Quit	GOOD					DUFF,CHRISTOPHER M DPH	0	

# Then you check on next reminder



The screenshot displays a software interface for clinical reminders. On the left, a sidebar shows a tree view under the 'Reminders' section. A 'Due' folder is expanded, listing several reminders: 'Alcohol Screen', 'Depression Screen', 'Domestic Violence', 'Tobacco USE Screenshot', and 'CNHSA TEST'. Each item has a small icon with a red checkmark, indicating it has been addressed. Below this list are folders for 'Applicable' and 'Not Applicable'. The main area on the right, titled 'CLINICAL REMINDER ACTIVITY', provides a detailed view of the 'Alcohol Screen' reminder. It includes the following text:

**CLINICAL REMINDER ACTIVITY**  
**Alcohol Screen:**  
Patient admits to having felt the need to Cut down on drinking.  
Patient admits to feeling Annoyed by other's criticism of drinking.  
CAGE 2/4  
Comment: Patient drinks only on weekends  
**Alcohol education**  
The patient/family was educated about the connection between alcohol or drug use and physical injury.  
Level of Understanding: Good  
Education duration: 3  
Substance abuse screening negative.  
Exam Result: Normal/negative

See how system check marks reminders already addressed

**Reminder Resolution: Depression Screen**

Last Depression screening in computer: None Found

DEPRESSION SCREENING using PHQ-2: \*Over the past 2 weeks, how often have you been bothered by the following:\*

-Little interest or pleasure in doing things

0 - not at all  
1 - several days  
2 - more than 1/2 the days  
3 - nearly every day

-Feeling down, depressed or hopeless

0 - not at all  
1 - several days  
2 - more than 1/2 the days  
3 - nearly every day

Score the results

0-2 points Depression Screening code NEGATIVE  
3-6 points Depression Screening code POSITIVE

☒ Patient had depression screening done at this encounter.

Result of Exam: \* **Normal/negative**

Comment:

If Depression screen is positive- document PHQ9 and notify appropriate  
\* Indicates a Required Field

CLINICAL REMINDER ACTIVITY

**Depression Screen:**

**Patient had depression screening done at this encounter.**

**Result of Exam: Normal/negative**

Examinations: **DEPRESSION SCREENING**

Clear Clinical Maint < Back Next > Finish Cancel

If screen POSITIVE, then staff also do add'l PHQ-9 screen which is a TIU/note template

You can click on the “NEXT” button at the bottom of the dialog template and it will bring up the next dialog; speeding up the process...

This screenshot shows a medical screening dialog box. On the left is a tree view with categories: Due, Alcohol Screen, Depression Screen (highlighted), Domestic Violence, Tobacco USE Scree, and CNHSA TEST. Below these are folders for Applicable, Not Applicable, and Other Categories. The main area contains a checkbox for 'Patient had depression screening done at this encounter.' and a text field for 'If Depression screen is positive- document PHQ9 and notify appropriate staff.' with a note '\* Indicates a Required Field'. Below this is a text area showing '<No encounter information entered>'. At the bottom are buttons: Clear, Clinical Maint, < Back, Next > (highlighted with a red box and a green arrow), Finish, and Cancel.

This screenshot shows a 'Reminder Resolution: Domestic Violence' dialog box. It has a title bar with standard window controls. The main area contains the text 'Last screening in computer: None Found' followed by two checkboxes: 'Patient was screened for domestic violence at this visit.' and 'Check to indicate education about domestic violence.'.

Reminder Resolution: Domestic Violence	
Last screening in computer: Date: May 20, 2005 Results:	
<input checked="" type="checkbox"/> Patient was screened for domestic violence at this visit.	
Result of Exam: *	Normal/negative
Comment:	
<input checked="" type="checkbox"/> Check to indicate education about domestic violence.	
<input checked="" type="checkbox"/> The patient/family was educated about the risk factors and behaviors that predispose to domestic violence and develop a plan to avoid relationships and situations which may result in domestic violence.	
Level of Understanding: *	Good
Education duration:	5
Comment:	gave out handout
<input type="checkbox"/> Patient given literature on domestic violence at this visit.	
<input type="checkbox"/> Patient educated about developing a plan to stay safe.	
<input type="checkbox"/> Patient/family understands that domestic violence is a primary, chronic, and preventable disease.	
<input type="checkbox"/> The patient/family will understand the co-morbidity of domestic violence with other conditions and the potential long-term interventions which may include psychotherapy, medication, and support groups.	
<input type="checkbox"/> The patient understands the role of stress management in domestic violence.	
* Indicates a Required Field	
CLINICAL REMINDER ACTIVITY	
Domestic Violence:	
Patient was screened for domestic violence at this visit.	
Result of Exam: Normal/negative	
Patient Educations: DVV-PREVENTION	
Examinations: INTIMATE PARTNER VIOLENCE	
Clear	Clinical Maint
< Back	Next >
Finish	Cancel

# Again dialog enters data



## Exams

Visit Date	Exams	Result	Comments	Provider	Location
03/25/2011	INTIMATE PARTNER VIOLENCE	NORMAL/NEGATIVE		COX,TRACIE D	MCALESTER HC



## Education



Show Standard

Visit Date▼	Education Topic	Comprehension	Readiness To Learn	Status	Objectives	Comment	Provider	Length	T
03/25/2011	Alcohol And Other Drugs-Injuries	GOOD					COX,TRACIE D	3	1
03/25/2011	Domestic Violence, Victim-Prevention	GOOD				gave out handout	COX,TRACIE D	5	1



# Tobacco Use

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- Remember 3 Tobacco HF categories
  - 1) Tobacco Exposure
  - 2) Tobacco (Smokeless- chewing/dip)
  - 3) Tobacco (Smoker)
- 
- So you would want to design your dialog to cover all 3 areas to get the most complete documentation

## Reminder Resolution: Tobacco USE Screen

Tobacco screening should be done yearly.

Last tobacco screens: Last TOBACCO (SMOKING) HF: NEVER SMOKED - Jan 06, 2011

Last TOBACCO (SMOKELESS - CHEWING/DIP) HF: CURRENT SMOKELESS - Jan 06, 2011

Last TOBACCO (EXPOSURE) HF: SMOKE FREE HOME - Jan 06, 2011

☒ NON Tobacco use:

- ☐ Patient has never used any tobacco products.
- ☐ Patient states they have never smoked tobacco.
- ☐ Patients states they have never used smokeless tobacco products.

☐ Patient reports current or history of tobacco use

☒ Tobacco in environment.

- ☐ Patient lives in a smoke free home
- ☐ Smoker in home
- ☐ Patient is exposed to smoke in work environment.

☒ Patient reports current or history of tobacco use

Patient uses tobacco currently

- ☐ Patient is a current smoker
- ☐ Patient states they smoke tobacco every day.
- ☐ Patients states they smoke tobacco on some days.
- ☐ Patient currently uses smokeless tobacco
- ☐ Patient currently is a smoker & uses smokeless tobacco.

Patient quit using tobacco < 6mos ago

- ☐ Patient has stopped smoking in the last 6 mos
- ☐ Patient has stopped using smokeless tobacco in the last 6 mos.

Patient quit using tobacco products >6 mos ago

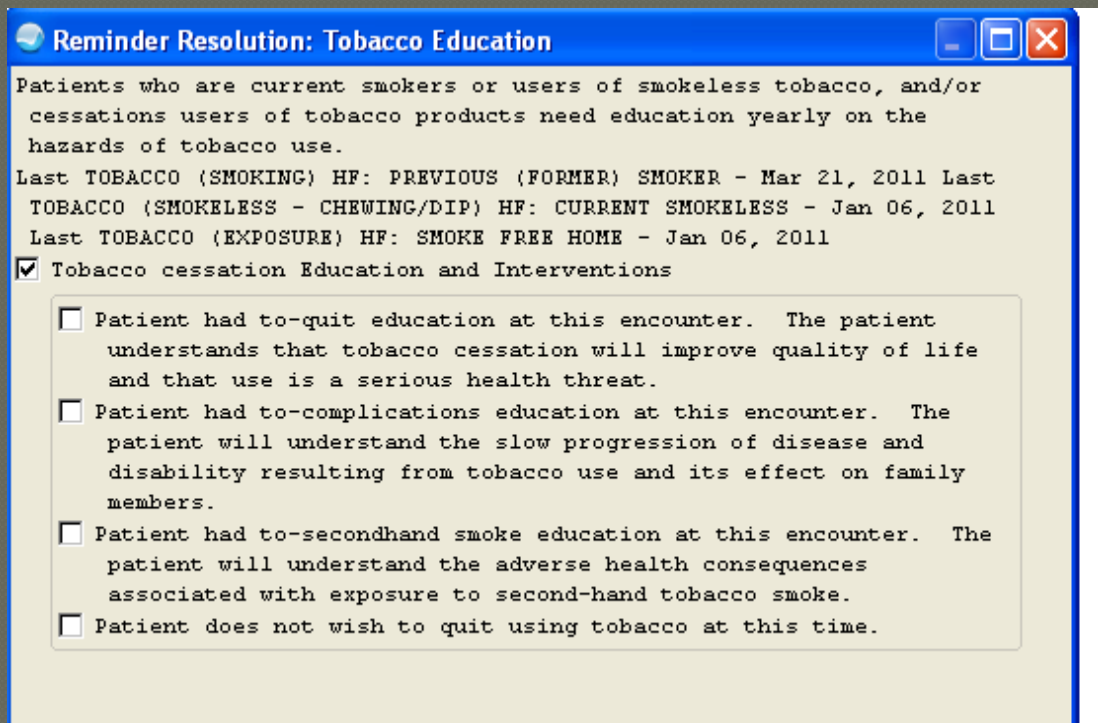
- ☐ Patient stopped smoking over 6 mos ago.
- ☐ Patient stopped using smokeless tobacco over 6 mos ago.

☐ Tobacco cessation Education and Interventions

☐ Tobacco in environment.

# For the Tobacco Users

- Once they have been documented as tobacco users then we must provide education



**Reminder Resolution: Tobacco Education**

Patients who are current smokers or users of smokeless tobacco, and/or cessations users of tobacco products need education yearly on the hazards of tobacco use.

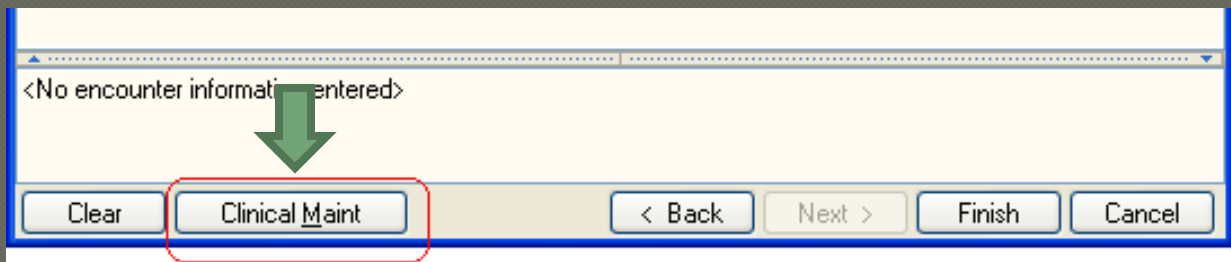
Last TOBACCO (SMOKING) HF: PREVIOUS (FORMER) SMOKER - Mar 21, 2011 Last TOBACCO (SMOKELESS - CHEWING/DIP) HF: CURRENT SMOKELESS - Jan 06, 2011 Last TOBACCO (EXPOSURE) HF: SMOKE FREE HOME - Jan 06, 2011

☒ Tobacco cessation Education and Interventions

- ☐ Patient had to-quit education at this encounter. The patient understands that tobacco cessation will improve quality of life and that use is a serious health threat.
- ☐ Patient had to-complications education at this encounter. The patient will understand the slow progression of disease and disability resulting from tobacco use and its effect on family members.
- ☐ Patient had to-secondhand smoke education at this encounter. The patient will understand the adverse health consequences associated with exposure to second-hand tobacco smoke.
- ☐ Patient does not wish to quit using tobacco at this time.

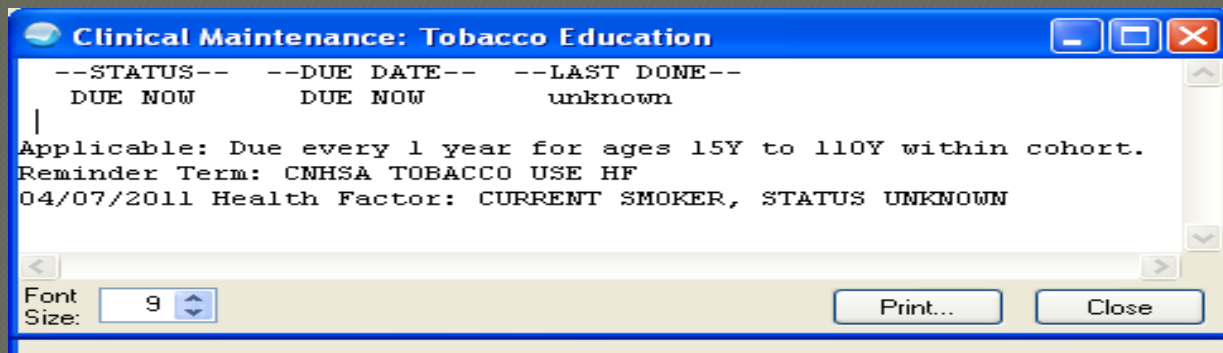
# CLINICAL MAINTENANCE

Available to help you know the why behind the reminder and what has been done in regards to this reminder



<No encounter information entered>

Clear Clinical Maint < Back Next > Finish Cancel



**Clinical Maintenance: Tobacco Education**

--STATUS--	--DUE DATE--	--LAST DONE--
DUE NOW	DUE NOW	unknown

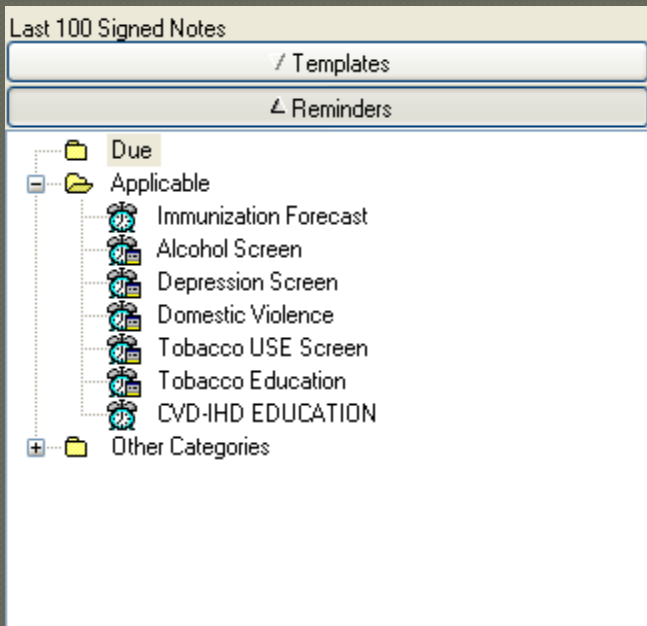
Applicable: Due every 1 year for ages 15Y to 110Y within cohort.  
Reminder Term: CMHSA TOBACCO USE HF  
04/07/2011 Health Factor: CURRENT SMOKER, STATUS UNKNOWN

Font Size: 9

Print... Close

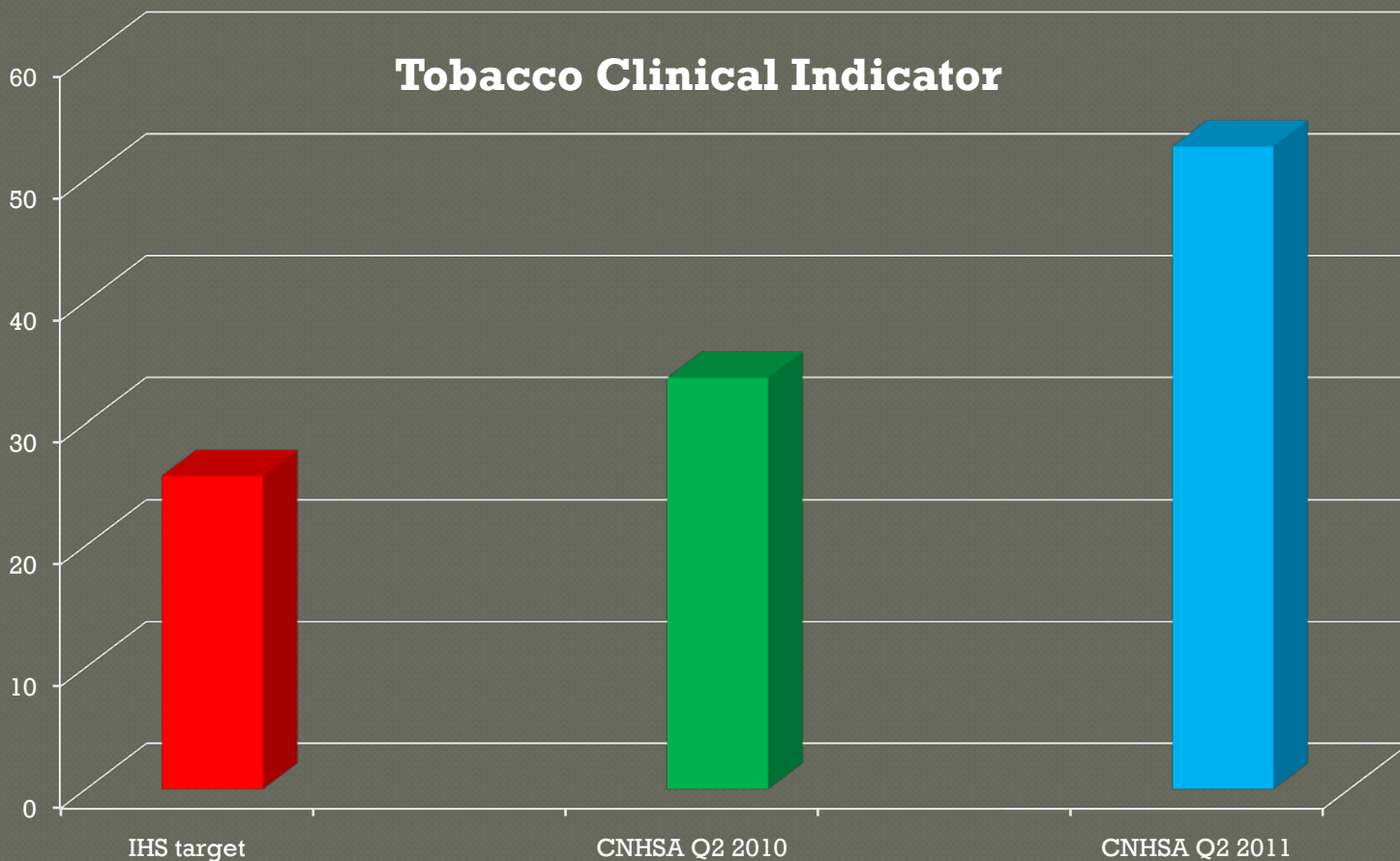
# Therefore:

- The ultimate goal is:

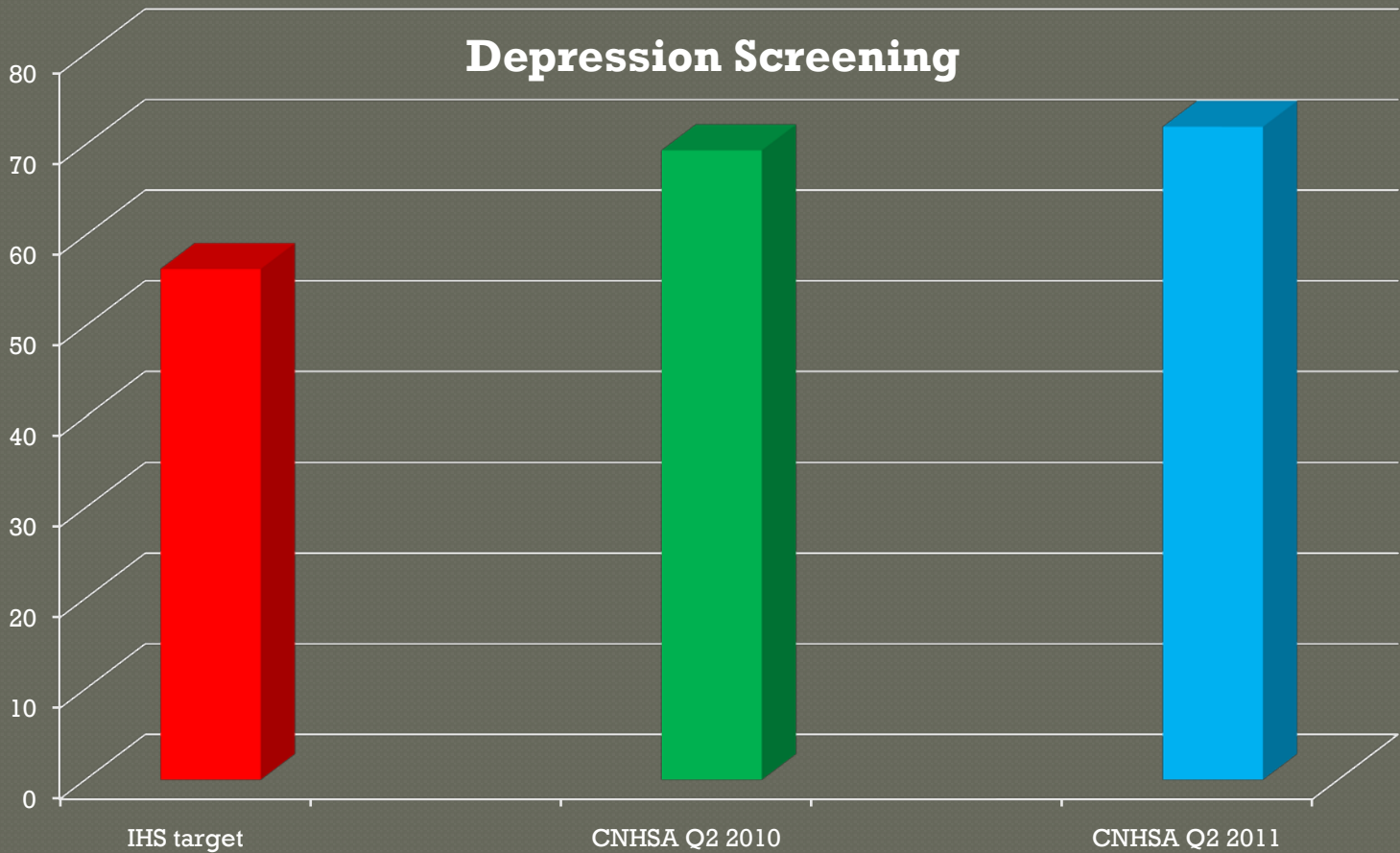


BLUE – NOTHING DUE, YOU ARE THROUGH

# How this process has helped us



# Another:





# Any questions?

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Tracie Cox, MT ASCP AMT  
EHR/LIS Specialist  
Choctaw Nation of Oklahoma