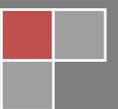




2017

P&P CIS

Preventive Care Guide for Cancer Screening



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Creating a New Health Maintenance Plan (HMP) Action Template

Creating a new action template will set up the parameters for the frequency, age, and sex for Health Maintenance Plan (HMPs).

1. Log onto P&P and click on **Registration**.
2. Click on the medical bag icon  to access the EMR module.
3. Select any patient in the EMR and open their record.
4. From the CPP or Tabs view of the main EMR module, click on the **Tracking** menu item followed by **Health Maintenance Plans (HMP)** (Figure 1).

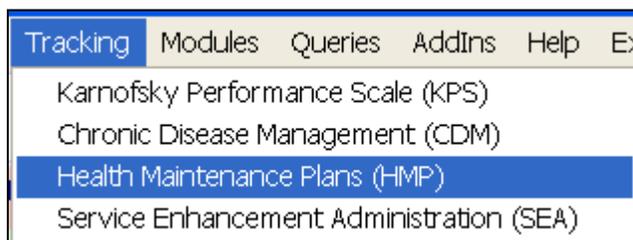


Figure 1: Navigating to HMP Setup

5. In the **HMP Setup** window click on **Setup** in the menu bar, then click on **Actions** (Figure 2).



Figure 2: Actions Option in Menu Bar

6. On the right hand side of the **Template Setup** screen, enter the name of the New Activity. For the type, assign it to a particular part of the S.O.A.P note (Figure 3).
Additionally, select a cycle time and age dependency for that activity based on the latest clinical guidelines. For cancer screening preventive care, sample parameters are below:
 - Pap: Every 3 years, 17 time periods, age 21-69, female
 - Mammogram: Every 2 years, 13 time periods, age 50-74, female
 - FOBT: Every 2 years, 13 time periods, age 50-74, male and female

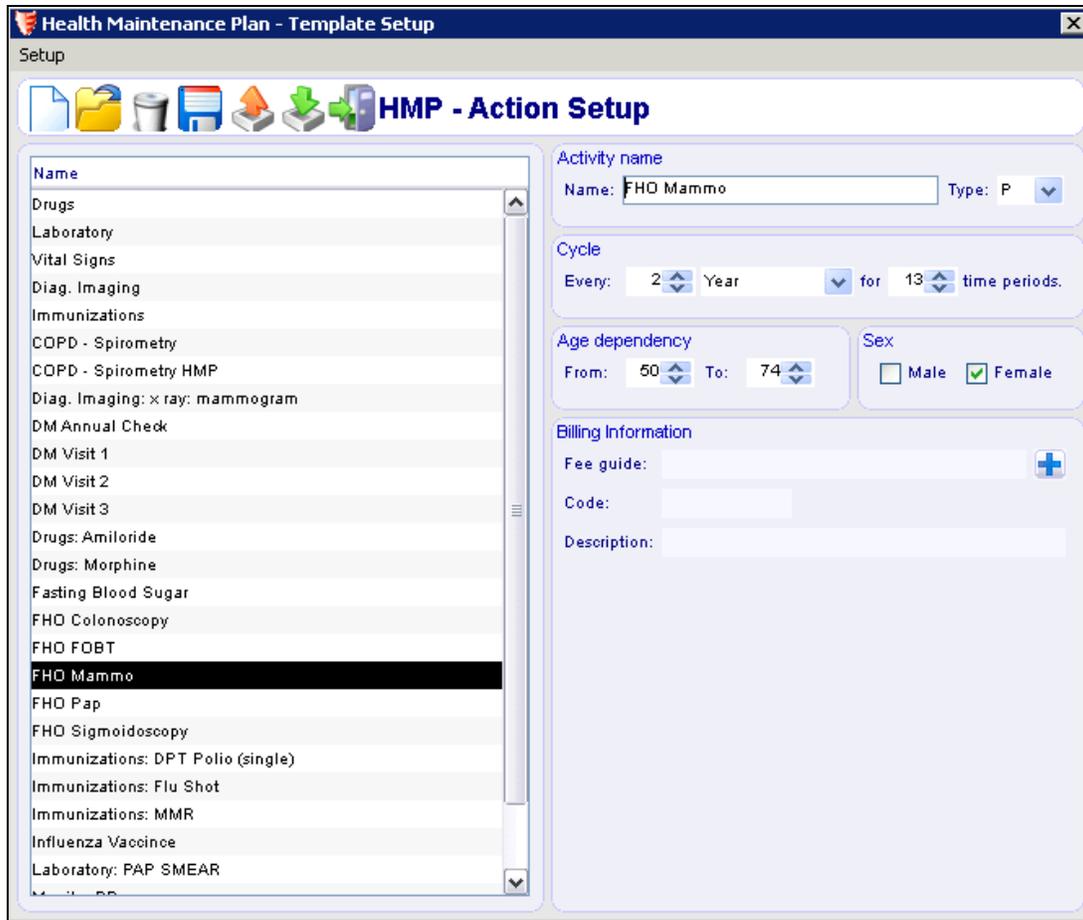


Figure 3: HMP Activity Setup

7. Once you have completed the criteria for your new activity, click on the save icon.  You should be able to then view your newly created activity in the left hand column. Exit the screen by clicking the on the exit icon. 

Assigning a New Health Maintenance Plan

This section outlines the steps for assigning an HMP for an individual patient. Assigning HMPs to patients will allow the Service Enhancement Administration (SEA) Module to properly track the status of preventive care management procedures.

1. To begin select a patient in the EMR Module and open their record.
2. From the CPP or Tabs view of the main EMR module, click on the **Tracking** menu item followed by **Health Maintenance Plans (HMP)** (Figure 4).

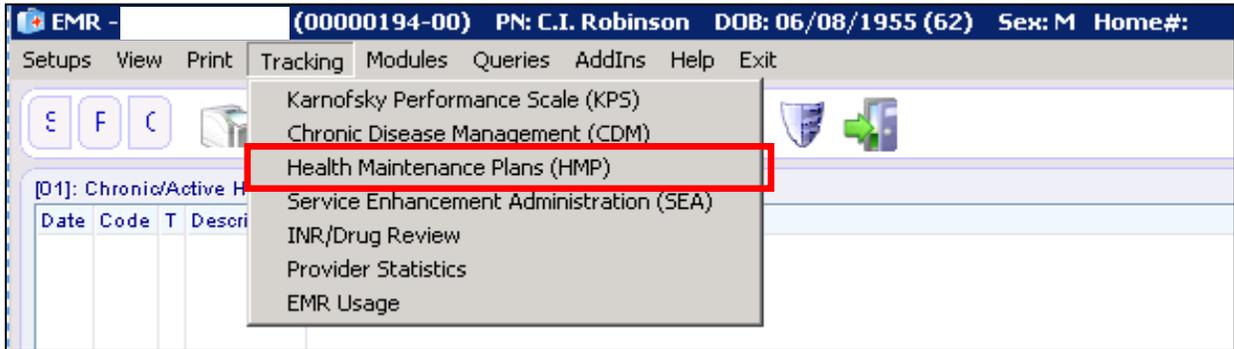


Figure 4: Navigating to HMP

3. The HMP setup window will open (Figure 5).

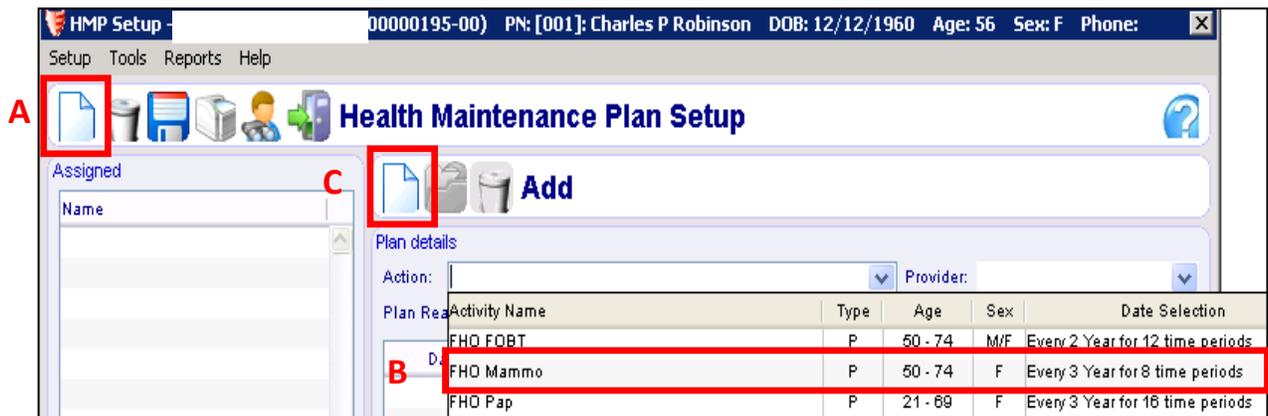


Figure 5: HMP Setup Window

- Select the **Add New Plan** icon  at the top left.
- Under the Action section, select the HMP activity you want to assign to the patient from the drop down menu (these are created by each clinic individually). Additionally you can select a provider.
- Click on the **Add New Activity** icon. 

4. Adjust the date selection criteria according to each patient (it will automatically be set to the criteria used when setting up the HMP Template). Ensure the **"Next Date Assignment"** is set to **Automatic** and the **"Automatic Date Selection"** is set to **Relative**. Then select **Add Date** to add the criteria to the patient's HMP (Figure 6).

Figure 6: HMP date assignment

5. To save the new Health Maintenance Plan click on the save icon. 
6. When the Health Maintenance Plan is successfully added it will appear in the “**Assigned list**” on the left hand side (Figure 7). The colour of the text indicates the patient’s preventative care status for that specific activity (i.e. overdue, up to date, due within next 30 days. Refer to the **Health Maintenance Plan Shield Information** section on page 9 for more info).

Figure 7: Assigned HMPs

Batch Assigning a Health Maintenance Plan

Batch assigning will create an HMP for multiple patients at once. Go through these steps if you are certain that a large number of a specific population requires an HMP assigned. Before batch assigning, ensure that patients are properly rostered to the correct provider in the EMR.

1. To begin select any patient in the EMR Module and open their record.
2. From the CPP or Tabs view of the main EMR module, click on the **Tracking** menu item followed by **Health Maintenance Plan (HMP)**.
3. In the HMP Setup window click on **Tools** under the menu bar followed by **Batch HMP Assignment** (Figure 8).

Figure 8: Navigating to Batch HMP Assignment

4. The **Batch Health Maintenance Plan Assignment** window will appear (Figure 9).

Figure 9: Batch HMP Assignment setup window

- A. First select a registered provider from the drop down list. You may also check the rostered check box if you would only like rostered patients to show up.
 - B. Select an initial HMP due date by either picking the option for selecting the patient's birth date as an initial date, or select a specific date.
 - C. Next, select an action item from the drop down list (i.e. the HMP you want to assign to multiple patients)
 - D. After ensuring all the options selected are correct, click on the  icon to add it to the list of HMPs.
 - E. After adding all the HMP's you would like to assign, click on the **Generate Patient List** button at the bottom of the window.
5. Once you click on the **Generate Patient List** button, you should be able to view a list of patients on the right hand side of that window (Figure 10). You can either go through the list and select the patients on an individual basis or click on the **Select All** button at the bottom of the screen (hold the **Ctrl** key to select multiple patients at once).

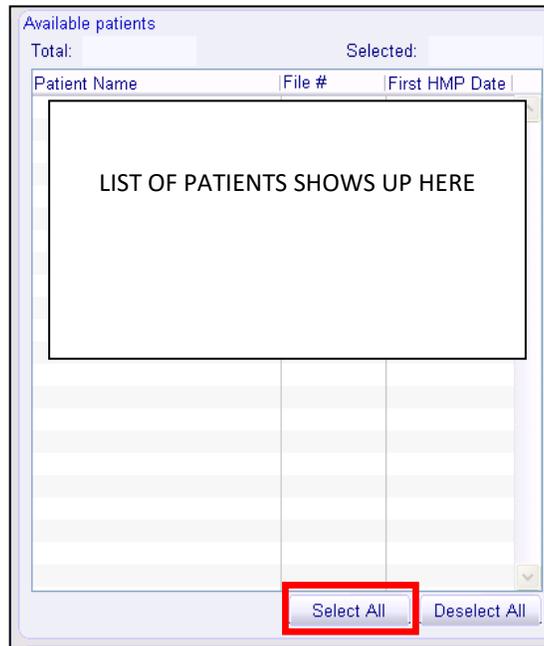


Figure 10: List of patients to batch assign

6. On the bottom right hand corner of the window, select a provider and a person that you would like to assign that batch to. Click on the **Create HMP** button to go through with the batch assignment (Figure 11).

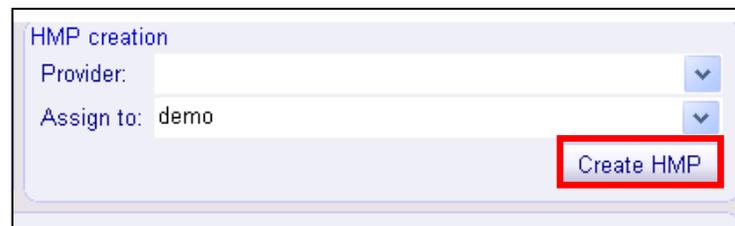


Figure 11: Creating Batch HMP

7. You should receive a pop up message telling you how many patients that HMP has been created for. Click on **Ok**.
8. You should now see a date beside the patients' names on the right side of the screen. This date is when the HMP is due.

Health Maintenance Plan Shield Information

In the CPP, SOAP, Summary CPP, or Tabs view of the EMR module, you can view the HMP's assigned to them by clicking on the HMP Shield Icon  (Figure 12).

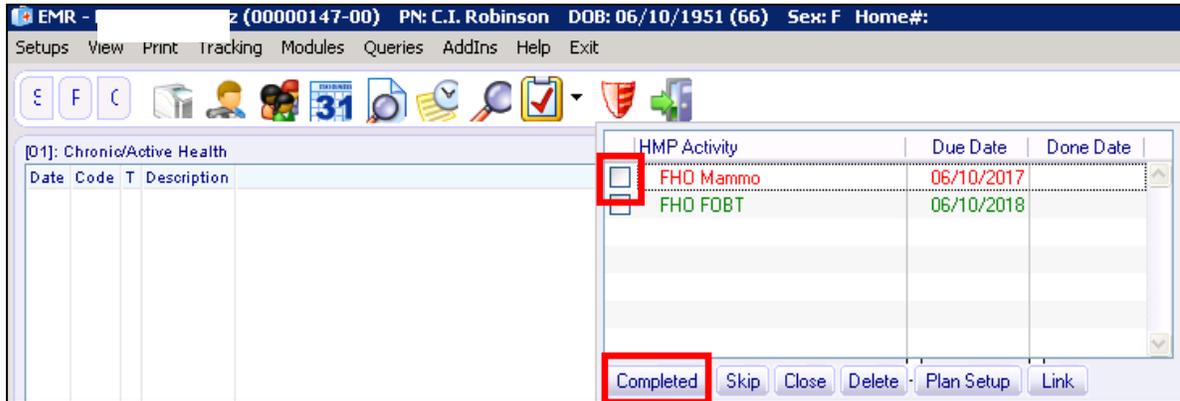


Figure 12: HMP Status

- If the shield is **RED** it means something is **due today or overdue**. To remove the red you must respond to the due/overdue task and by selecting the checkbox and clicking **“Completed”** or **“Skip”** if the patient is refusing to do it at this time (Figure 12).

NOTE: If you choose skip you cannot undo this. It automatically removes the HMP and sets the next date to the next closest parameter (e.g. 4 months from the date skipped).

- If the shield is **YELLOW/ORANGE** there is something that will be **due within the next 30 days**.
- If the shield is **GREEN** it means that there is **nothing due within the next 30 days**.
- If the shield is **GREY** it means that there is **no HMP** set up for that patient.

Documenting Exclusions

Documenting patients who do not require a screening test can be done in either the Hospitalizations section within the EMR module or the Service Enhancement Administration (SEA) module. This will improve the accuracy of the SEA performance report and recall list of ineligible patients. For more information on the SEA module, refer to pages 12-16 of this guide.

Exclusions in Hospitalizations

1. To begin select a patient in the EMR Module and open their record.
2. Go to the SOAP view.

- To access to Hospitalization section from the SOAP menu, click on **Add to SOAP**, followed by **Plan**, then **Hospitalization** (Figure 13). Alternatively you can click on the Hospitalization icon  on the left side of the screen.

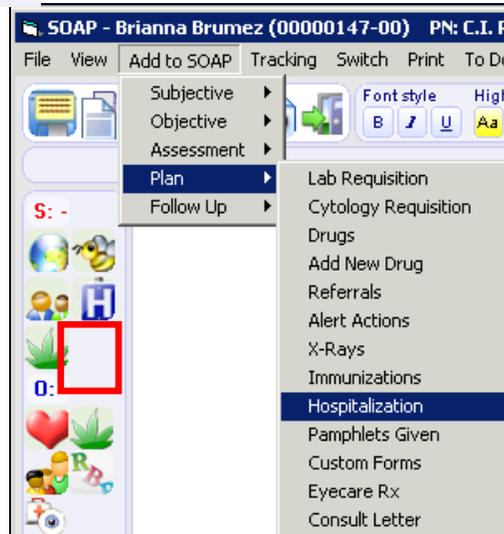


Figure 13: Navigating to Hospitalizations

- The Hospitalizations window will open (Figure 14).

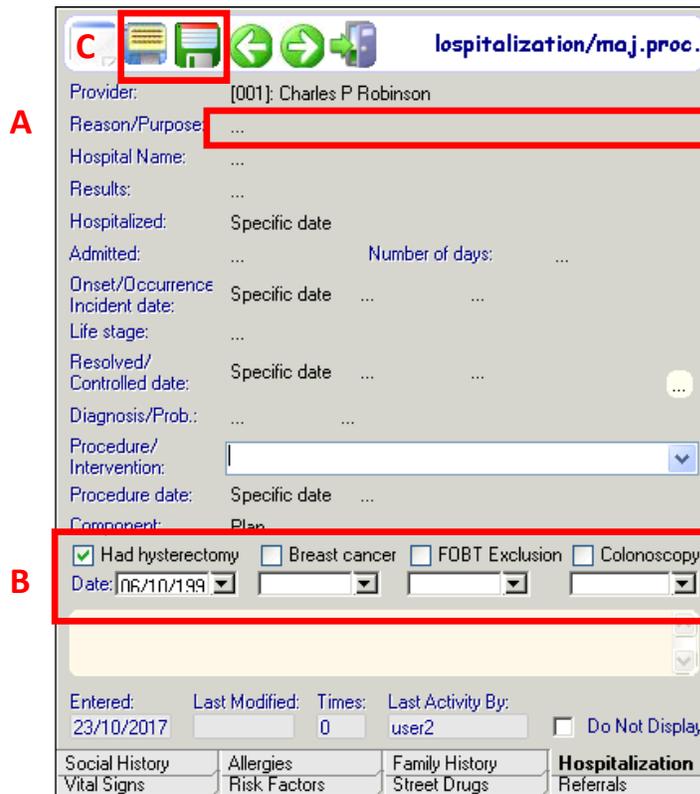


Figure 14: Documenting Exclusions in the Hospitalizations window

- A. Enter a reason/purpose.
 - B. Check off the appropriate exclusion and document the date of the procedure or condition.
 - C. Click the Save icon  or the Save and close icon. 
5. If Q codes in the fee guide in CIS have already been configured, a pop up will appear asking if you want to automatically bill an exclusion code. Click **Yes** (Figure 15). The billing exclusion code will link to the SEA module.

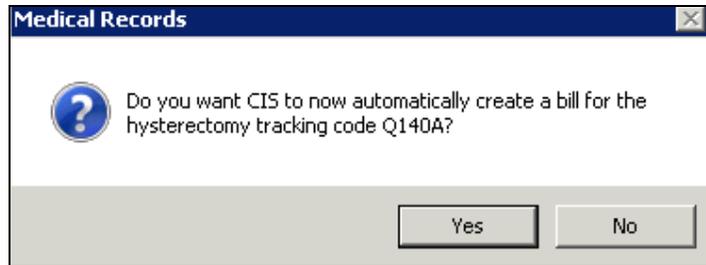


Figure 15: Hospitalizations auto bill prompt

Exclusions in the Service Enhancement Administration (SEA) Module

1. To begin select a patient in the EMR Module and open their record.
2. From the CPP or Tabs view of the main EMR module, click on the **Tracking** menu item followed by **Service Enhancement Administration (SEA)** (Figure 16).

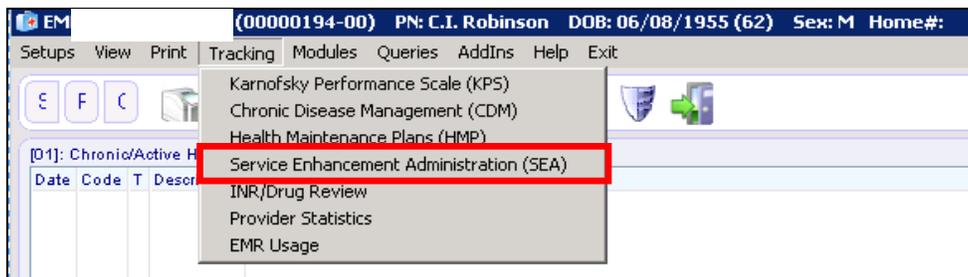


Figure 16: Navigating to the SEA Module

3. Click on the ... button . Exclusions can be documented in the window that opens. Document the appropriate dates and click the save icon  (Figure 17).

NOTE: The SEA will populate any exclusions that were previously documented in Hospitalizations section within the EMR module.

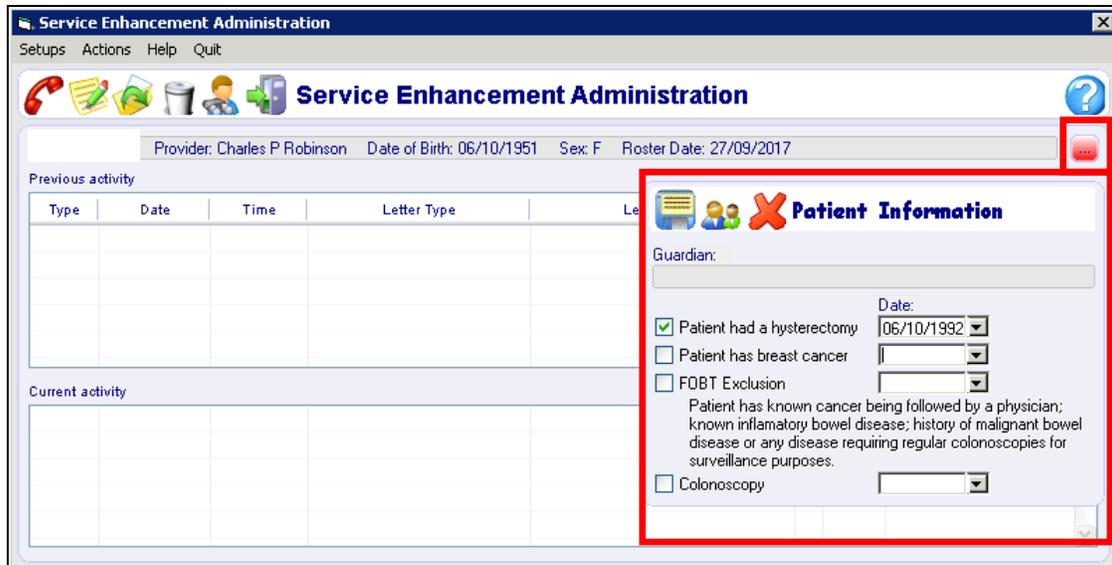


Figure 17: Exclusions in the SEA Module

4. If Q codes in the fee guide in CIS have already been configured, a pop up will appear asking if you want to automatically bill an exclusion code. Click **Yes** (Figure 24).

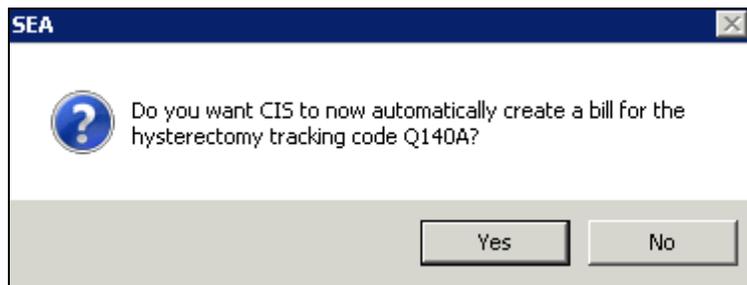


Figure 18: SEA auto bill prompt

Service Enhancement Administration (SEA) Module

The Service Enhancement Administration (SEA) module can be used to generate reports to track the performance of preventive care management procedures. The SEA performance reports will only work if the HMPs have been set up and providers have been updating the HMP status appropriately.

SEA Report Parameters

1. To begin select any patient in the EMR Module and open their record.
2. From the CPP or Tabs view of the main EMR module, click on the **Tracking** menu item followed by **Service Enhancement Administration (SEA)** (Figure 19).

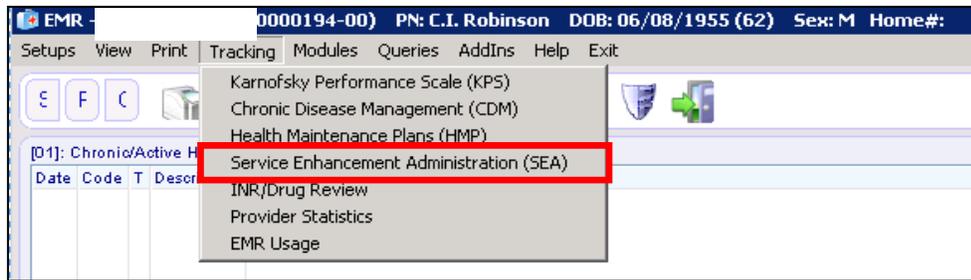


Figure 19: Navigating to the Service Enhancement Administration (SEA)

3. The SEA window will open. In the menu click **Setups**, then **Report Parameters** (Figure 20).

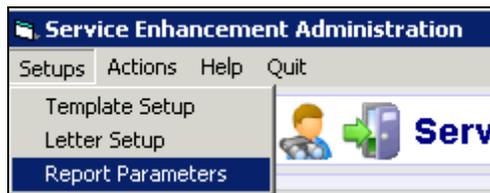


Figure 20: Navigating to SEA Report Parameters

4. The Report Parameters window will open (Figure 21).



Figure 21: Report Parameters

5. Navigate to the desired preventive care procedure you wish to configure the reports for by clicking on the appropriate tab (click the arrows to scroll to more procedures). If you have set up a new HMP template, select the appropriate HMP item from the drop down menu (Figure 21). Edit the report parameters based on the most recent clinical guidelines and/or your clinic protocol.

SEA Performance Report

1. To begin select a patient in the EMR Module and open their record.
2. From the CPP or Tabs view of the main EMR module, click on the **Tracking** menu item followed by **Service Enhancement Administration (SEA)**.
3. In the SEA menu bar click on **Actions** followed by the preventative care plan you would like to generate a report for (Figure 22).
4. Select **Performance Report** from the list that appears to the right of the action list (Figure 22).

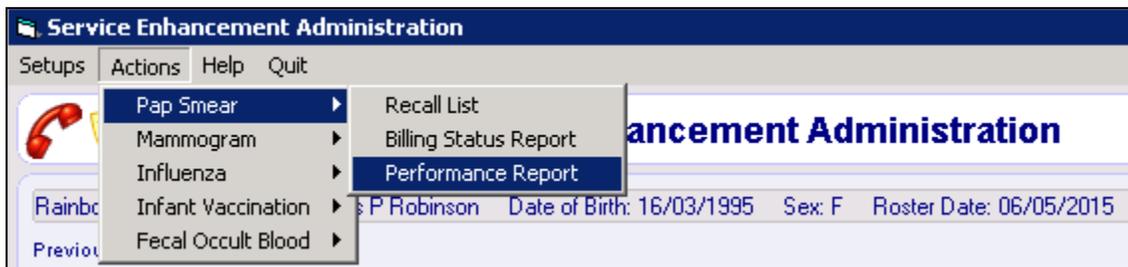


Figure 22: Navigating to a Performance Report

5. The **Performance Report** window will appear (Figure 23).

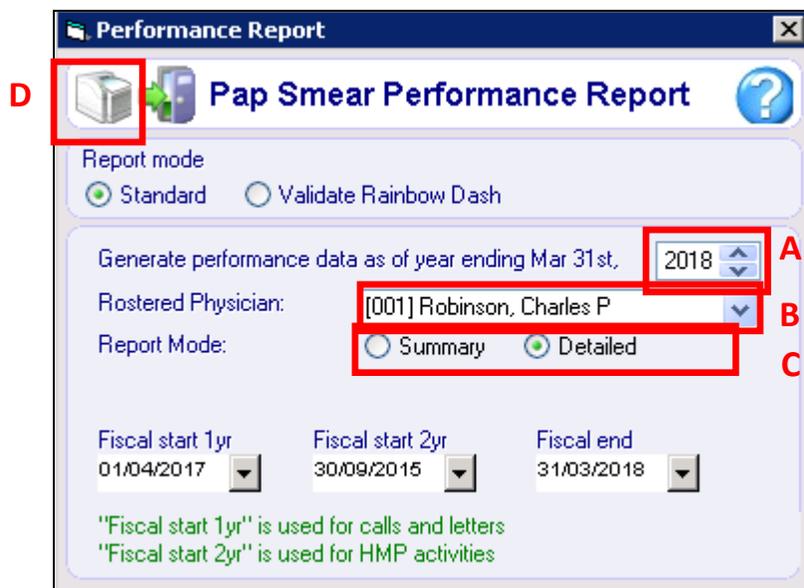


Figure 23: Performance Report window

- A. Adjust the year ending date to the fiscal year you wish to generate reports for.
NOTE: The **Fiscal start** and **end** date will auto adjust when the year ending date is changed.
- B. Select a Physician from the drop down list.
- C. The **Report Mode: Detailed** will generate a report with a list of patients and their demographics as well as a data summary on the last page. If you do not need the patient demographics change the Report Mode to **Summary**.
- D. Click the printer icon  to generate the report.

SEA Recall List—Ineligible Patients

The SEA Recall List report generates a list of patients who are ineligible to receive testing for the preventative care specified.

1. To begin select any patient in the EMR Module and open their record.
2. From the CPP or Tabs view of the main EMR module, click on the **Tracking** menu item followed by **Service Enhancement Administration (SEA)**.
3. In the SEA menu bar click on **Actions** followed by the preventative care plan you would like to generate a report for (Figure 24).
4. Select **Recall List** from the list that appears to the right of the action list (Figure 24).

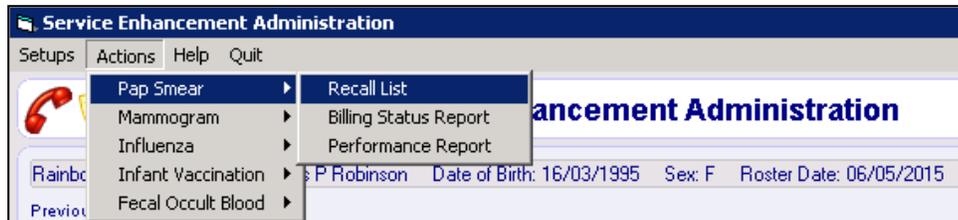


Figure 24: Navigating to a Recall List

5. The **Recall List** window will appear (Figure 25).

The screenshot shows a window titled "Recall List" with a sub-header "Pap Smear Recall List". A red box labeled 'C' highlights a printer icon and a green arrow. Below this, the "Report mode" section has three radio buttons: "Eligible patients" (labeled 'A'), "Ineligible patients" (labeled 'B' and selected), and "Validate Rainbow Dash". The "Selected Pap Smear Code:" field contains "FHO Pap" (labeled 'B'). The "Rostered Physician:" dropdown menu is open, showing "[001] Robinson, Charles P" (labeled 'B'). There are checkboxes for "Use the Letter Generator to automatically create letters" and "Generate 'To Call' report". Below are dropdown menus for "Primary Letter:" and "Secondary Letter:". At the bottom, there are "Fiscal start 1yr" (17/10/2015), "Fiscal start 2yr" (17/10/2015), and "Fiscal end" (17/10/2017) dropdowns. A green note at the bottom states: "Fiscal start 1yr" is used for calls, letters and bills; "Fiscal start 2yr" is used for HMP activities.

Figure 25: Recall List

- A. Set the **"Report Mode"** to **Ineligible patients**.
- B. Select a physician from the drop down **Rostered Physician** list.
- C. Click the printer icon  to generate the report.

