

CHCN Fixit Process and End of Visit Template

Improving efficiency and quality via
feedback loops

What are they?

- Tools to help identify problems – things that should be fixed – in a timely and efficient way
- Fixits: nightly report automatically distributed to each location for things that can be fixed after (or before) the encounter
- End of visit: template that can be launched during the visit for problems that should be fixed by the care team during charting
- Types of rules/alerts: operational, clinical, regulatory/MU, billing...
- Some documentation available as handouts/pdf files

Common features

- Implemented and configured via practice templates
- Multiple alerts/rules that can be enabled or not as needed
- Extensible – can add new rules relatively easily without major template changes (though new rules need to be enabled and possibly configured)
- Overview reports to be able to monitor and manage the process

End of Visit – ‘Active Alerts’

- End of visit alerts are presented in a data grid
- Can configure each alert to launch an appropriate template, module or popup when it is clicked
- Users seem to appreciate the navigation help!

Using the Tools

- Fixit
 - Data process run each night as scheduled job
 - Report subscriptions in SSRS set up to send location detail report to each location
 - Each site does their own fixes
- End of Visit
 - MAs can launch template before the provider sees the patient and address any MA-level alerts (allergies reviewed, smoking status documented, etc.)

Caveats and Comments

- Suitable for unambiguous problems – i.e. there should never be punctuation in the patient name
- Implemented via SQL stored procedures – very helpful to have some SQL skills to assess and troubleshoot the process
- Reports are written for SQL Server Reporting Services (i.e. not in Crystal)
- Will need to update as/when NG changes things in future versions; some of the smoking/tobacco and BMI rules on EOv had to be updated for 8.3

Fixit – Location Detail Report

Quality Report: Detail Listing of fixes needed for Main Clinic Adult Pod A

<u>fixit rule group</u>	<u>rule nbr</u>	<u>error desc</u>	<u>responsible user</u>
Appointments	0005	Charge #1(99211) on enc 39 is missing a reqd ICD - must have one of 65.01, 65.09, 65.14	Mark OLeary
	0010	Enc 64, Chg # 1 99215 OFFICE/OUTPATIENT VISIT, EST has no primary ICD code	Mark OLeary
	0010	Enc 7170, Chg # 1 99214 OFFICE/OUTPATIENT VISIT, EST has no primary ICD code	Mark OLeary
	0010	Enc 7170, Chg # 2 87046 STOOL CULTR, BACTERIA, EACH has no primary ICD code	Mark OLeary
	0014	Enc 72, Chg 1 99211 has different rendering (Provider, Test T) than enc rendering (Doctor52 MD, Test52)	Mark OLeary
	0014	Enc 7082, Chg 1 99211 has different rendering (Provider, Test T) than enc rendering (Doctor10 MD, Test10)	Mark OLeary
	0014	Enc 7082, Chg 2 85002 has different rendering (Provider, Test T) than enc rendering (Doctor10 MD, Test10)	Mark OLeary
	0015	Enc 72, Chg 1 99211 has different location (Main Clinic Adult Pod B) than enc location (Main Clinic Adult Pod A)	Mark OLeary
	0015	Enc 7082, Chg 1 99211 has different location (Main Clinic Adult Pod B) than enc location	Mark OLeary

Fixit – Summary Rpt

Quality Report: Summary of fixes needed by location - test rules excluded

Location\Rule Grp	Appointments	Charges	EPM Config	Total
EPM config	0	0	55	55
Main Clinic Adult	5	13	0	18
Main Clinic Adult	1	0	0	1
Total	6	13	55	74

Loc	Type	Nbr		test only rule
EPM config				
	<input checked="" type="checkbox"/> EPM Config		Tot = 55	
Main Clinic Adult Pod A				
	<input type="checkbox"/> Appointments		Tot = 5	
		0019	5 Encounter with charges not linked to appointment	N
	<input checked="" type="checkbox"/> Charges		Tot = 13	
Main Clinic Adult Pod B				
	<input checked="" type="checkbox"/> Appointments		Tot = 1	

List of All Rules (disabled rules are shaded dark, enabled but test only rules are shaded light)

fixit grp	fixit nbr	enabled	nbr found	fixit name	fixit desc
Appointments	0002	yes		Future appts with 2 (person) resources	Only 1 provider should be associated with each appt
Appointments	0019	yes	6	Encounter with charges not linked to appointment	Enc (not in history status) with charges and no linked for same day & pat exists
Appointments	0023	yes		Duplicate appointments	Person with multiple future appts with same date, loc
Appointments	0030	no		Future appts in next 7 days with no active insurance for established patient	
Appointments	0044			Keep appts no charges	Last 2 weeks, excluding deleted/complete scheduled

Fixit Configuration Practice Template

CHCN Fixit Rules

Update rules list

Fixit Rule Group	Fixit Rule Nbr	Enabled	Fixit Rule Name	Fixit Rule Desc	Test Or
Appointments	0002	yes	Future appts with 2 (person) resources	Only 1 provider should be associated with each appt	
Appointments	0019	yes	Encounter with charges not linked to appointment	Enc (not in history status) with charges and no linked appt where an appt for same day & pat exists	
Appointments	0023	yes	Duplicate appointments	Person with multiple future appts with same date, location and event	0
Appointments	0030	no	Future appts in next 7 days with no active insurance for established patient		
Appointments	0041		Kept appts no charges	Last 2 weeks, excluding deletes/cancels/reschedules with no nonvoid or pending charges	

Update fixit problems data

Updates will happen at night in scheduled job on the report server to avoid performance issues
Use this button for testing only

add triggers for all fixit stored procedure so they get embedded in the template use impossible conditions so they work

Rebuild reqd icds

Also builds the reqd cpts and gender s

MRNs for test patients (comma delimited)

15041, 4, 164

Fixit log - last 10 days only

Process Start Time	Rule Nbr	Nbr Found	Start Time	Finish Time	Rule Desc
2014-09-18 21:00:00	1001	7174	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	XYZ All enc list for testing
2014-09-18 21:00:00	31	1	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Family Pact encounter with no S code diagnosis
2014-09-18 21:00:00	29	0	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Location not in meta data template
2014-09-18 21:00:00	28	0	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Payer not in meta data template
2014-09-18 21:00:00	27	0	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Provider not in meta data template
2014-09-18 21:00:00	26	52	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Provider with NG license not credentialed at CHCN
2014-09-18 21:00:00	25	0	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Total narratives on encounter charges exceed 80 chars
2014-09-18 21:00:00	23	0	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Duplicate appointments
2014-09-18 21:00:00	22	0	Sep 18 2014 9:00PM	Sep 18 2014 9:00PM	Provider scheduled for 2 different working slots at same time

Reqd ICD code data pulled from claim edits (#117)

Cpt Code	Cpt Desc	Icd Code	Icd Desc	Library Name
82960	TEST FOR G6PD ENZYME	250.10	DMII KETO NT ST UNCNRRLD	Medicare Claim Edits
82960	TEST FOR G6PD ENZYME	250.11	DMI KETO NT ST UNCNRRLD	Medicare Claim Edits
82960	TEST FOR G6PD ENZYME	250.12	DMII KETOACD UNCONTROLLOD	Medicare Claim Edits

Fixit Rule Configuration

"chcn_fixit_rule_config_ep" - [41 of 44]

CNCN Fixit Rule Configuration Detail

stored procedure name

fixit rule name

fixit rule description

fixit nbr

group

subgroup

Enabled Y/N

Testing indicator Test only rule

Jun 23 2014 4:39PM

« < Clear For Add Delete Save Close > »

End of Visit Template

End of Visit Enc nbr: 7176; Payers: Medicare

Procedures currently on this encounter

Orders and Meds Listing

SIM	SIM Desc	Units	Dx 1	Dx 2	Dx 3	Dx 4

Alerts

Refresh alerts

Level	Type	Details	/ ▲
	Charges	Diagnosis made but not EM or related SIM is on the encounter	3
	Legal	Missing visit note document on office visit	1
	MU	Missing LMP	2
	MU	Missing patient education documentation	1
	MU	Missing patient plan on office visit - generate patient plan	1
MA	MU	Missing smoking status	0
MA	MU	Missing tobacco use	0

Additional Procedure Codes

Misc Supplies

Screening X-rays

Save and Close

Aug 22 2014 1:36PM

End of Visit Config (top part)

CHCN End of Visit Configuration

URL for SSRS report

e.g. http://chcnssrs01/ReportServer_ACH/Pages/Reports/Orders and Meds summary for encounter

replace ACH with the abbrev for your clinic...

Svc category for drop down 1

Svc category for drop down 3

Svc category for drop down 2

Svc category for drop down 4

Note: Reqd ICDs also refreshed as part of nightly fixit process

Alerts configuration

[Refresh EOv alert list](#)

Proc Desc	Enabled Ind	Alert Level	Launch Template Type	Launch Template Name	Alt Launch Template Name
02 Missing reqd ICD codes (claim edit 117)	y	Prov	T	fts_soap	
03 Missing BP on office visit	y	MA	T	fts_intake	
04 Missing smoking status	y	MA	P	tobacco_cessation	
05 Missing allergy info	y	MA	M	Allergies	
06 Missing tobacco use	y	MA	P	soc_hx_tob_use	
07 Unsubmitted lab orders on order module processing	y	MA	P	order_module_processing	
08 Missing BMI plan	y	Provider	P	bmi_actions	diff_dx
09 Pending lab order					
10 Missing Title X template	y	MA	T	titlex	
11 Missing allergy review info	y		T	triage2	
12 Missing tobacco cessation discussed	y				

End of Visit Config (bottom part)

Specialties that will use alternative launch template	<input type="text" value="Family Practice, Obstetrics"/>	<input type="button" value="Add specialty"/>	[All add buttons show o that have been used on
Visit Types that indicate Office Visit	<input type="text" value="Office Visit, Office Visit - OB"/>	<input type="button" value="Add visit type"/>	Missing BP alert will run in this list Use commas to separa
Visit Types for 10 Missing Title X template	<input type="text" value="gyn visit, Office Visit - GYN"/>	<input type="button" value="Add visit type"/>	Missing Title X template
Patient plan document list	<input type="text" value="pasadfast lanndfas, Chart_Note"/>	<input type="button" value="Add document"/>	
Visit note document list	<input type="text" value="doc name here, Provider_Test_Action"/>	<input type="button" value="Add document"/>	
Diagnosis category indicating pregnancy	<input type="text" value="Pregnancy"/>		
Service category indicating face-to-face visit	<input type="text" value="MVis"/> <input type="text" value="CHCN Med Visit"/>		

Aug 25 2014 10:12AM