DRVS Training

Visit Planning Alerts
Administration and Configuration for Your Practice
The Admin Tab for Visit Planning - Overview

• Practices should evaluate the set-up in the Admin Tab and decide if adjustments are needed—such as enabling or disabling alerts, or changing alert timeframes.

• Changes made will affect the entire practice’s view of the Visit Planning report, they cannot be made on a per user basis at this time.

• Enabling and disabling changes occur immediately in your system, but *all other configuration changes will be active in your system the next day.

• See the following page for detailed information about alerts and risk factors available.
<table>
<thead>
<tr>
<th>Alert</th>
<th>Relevant Specification Sources</th>
<th>Diagnosis</th>
<th>Min Value</th>
<th>Max Value</th>
<th>Min Value 2</th>
<th>Max Value 2</th>
<th>Look back Days</th>
<th>Min Age</th>
<th>Max Age</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1c</td>
<td>UDS, NQF 0059, NQF 0575</td>
<td>Diabetes</td>
<td>1</td>
<td>7</td>
<td>N/A</td>
<td>N/A</td>
<td>180</td>
<td>0</td>
<td>85</td>
<td>B</td>
</tr>
<tr>
<td>Adult Weight Screening</td>
<td>UDS, MU, NQF 0421</td>
<td>Not configurable. BMI ranges are coded based on specs for certain ages, and the follow up is only required if patient is malnourished or obese. Set to 365 look back days.</td>
<td>18</td>
<td>85</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asthma Severity</td>
<td>UDS, MU, NQF 0001</td>
<td>Asthma</td>
<td>Process, non numeric result.</td>
<td>36500</td>
<td>0</td>
<td>85</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMI</td>
<td>NQF 0421, ACO 16</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>18</td>
<td>150</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BMI Percentile</td>
<td>UDS, MU, NQF 0024</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>2</td>
<td>17</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BP</td>
<td>UDS, MU, CQM NQF 0013, NQF 0018, NQF 0061, ACO 21, ACO 24</td>
<td>Diabetes, HTN, IVD</td>
<td>1</td>
<td>130</td>
<td>1</td>
<td>80</td>
<td>365</td>
<td>85</td>
<td>B</td>
<td></td>
</tr>
<tr>
<td>Colorectal Cancer Screening</td>
<td>MU, NQF 0034</td>
<td>Not configurable. Alert includes FIT, Colonoscopy, Sigmoidoscopy, etc., each of which have different required frequencies. Those standards are hard-coded. If one of the options is fulfilled, alert will not appear.</td>
<td>50</td>
<td>75</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental Visit</td>
<td>PCMH, MU, ADA</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>0</td>
<td>150</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Depression Screening</td>
<td>MU, UDS, PCMH, NQF 0418, ACO 18</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>18</td>
<td>150</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eye Exam</td>
<td>NQF 0055</td>
<td>Diabetes</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>0</td>
<td>85</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flu</td>
<td>MU, UDS, NQF 0041, ACO 14</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>1</td>
<td>85</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foot Exam</td>
<td>NQF 0056</td>
<td>Diabetes</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>0</td>
<td>85</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LDL</td>
<td>NQF 0064</td>
<td>Diabetes, HTN</td>
<td>1</td>
<td>100</td>
<td>N/A</td>
<td>N/A</td>
<td>365</td>
<td>85</td>
<td>B</td>
<td></td>
</tr>
<tr>
<td>Mammogram</td>
<td>MU, UDS, NQF 0031, ACO 20</td>
<td>Process, date of most recent.</td>
<td>730</td>
<td>40</td>
<td>70</td>
<td>F</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nephropathy Screen</td>
<td>NQF 0062</td>
<td>Diabetes</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>0</td>
<td>85</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nutritional Counseling</td>
<td>UDS, MU, NQF 0024</td>
<td>Process, non numeric result.</td>
<td>365</td>
<td>2</td>
<td>17</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pap Smear</td>
<td>MU, UDS, HRSA PCMH FY2012</td>
<td>Process, date of most recent.</td>
<td>1095</td>
<td>24</td>
<td>65</td>
<td>F</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PCV (Pneumoccal Vaccine)</td>
<td>HRSA HDC, UDS, NQF 0041, ACO 15</td>
<td>Diabetes</td>
<td>Process, date of most recent.</td>
<td>36500</td>
<td>65</td>
<td>85</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical Activity Counseling</td>
<td>UDS, MU, NQF 0024</td>
<td>Process, non numeric result.</td>
<td>365</td>
<td>2</td>
<td>17</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tobacco Cessation</td>
<td>UDS, NQF 0028, ACO 17</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>18</td>
<td>150</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tobacco Status</td>
<td>UDS, MU, NQF 0027</td>
<td>Process, date of most recent.</td>
<td>365</td>
<td>18</td>
<td>150</td>
<td>B</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Risk Factor Displayed Value</th>
<th>Risk Factor Name</th>
<th>Description</th>
<th>Patient Inclusion Logic</th>
</tr>
</thead>
<tbody>
<tr>
<td>OBS</td>
<td>Obesity</td>
<td>Patient is obese.</td>
<td>Most recent BMI is &gt;30</td>
</tr>
<tr>
<td>TOB</td>
<td>Tobacco User</td>
<td>Pt. uses tobacco.</td>
<td>Most recent tobacco status = current tobacco user</td>
</tr>
<tr>
<td>SMIP</td>
<td>Severe Mental Illness / Psychosis</td>
<td>Active Dx of Severe Mental Illness and/or Psychosis.</td>
<td>Severe Mental Illness (290.0, 290.1, 290.2, 290.3, 290.4, 290.8, 290.9, 291, 291.0, 291.1, 291.2, 291.3, 291.4, 292.0, 292.0, 292.0, 292.1, 292.1.12, 292.2, 292.8, 292.81, 292.82, 292.83, 292.84, 292.85, 292.89, 292.9, 293, 293.0, 293.84, 294, 294.0, 294.1, 294.8, 294.9, 295, 296, 296.0, 296.1, 296.2, 296.3, 296.4, 296.5, 296.6, 296.7, 296.8, 296.9, 297, 298, 299, 299.0, 299.1, 299.8, 299.9) and/or Psychosis (290%-294%, 295%-299%)</td>
</tr>
<tr>
<td>SAD</td>
<td>Substance Abuse / Dependency</td>
<td>Active Dx of either or both.</td>
<td>Alcohol Abuse (305.00), Alcohol Dependency (303%), Drug Abuse (305%), Drug Dependency (304%)</td>
</tr>
</tbody>
</table>
The Admin Tab for Visit Planning - Overview

• The report comes with alert age and date timeframes set to national standards (NCQA, MU, UDS), and set to the strictest standard where conflicts exist. This is to help practices focus on only one goal, while still achieving the others.

• Please read release notes! They contain valuable information about updates to the system, including updates to the Visit Planning report.

• In new releases, new patient alerts are disabled to avoid user confusion, so if your practice wants to take advantage of them - be sure to enable them in the Admin Tab and let users know to expect to see them.
Where is the Admin Tab?

- If you have access, the Admin tab will be on the upper right.
- If not, request access from your administrator.
Accessing the Admin Tab

1. Click on the “Admin Tab.”

2. Scroll to “Reporting Administration.”

3. Select “Patient Alerts.”
## Orientation to the Admin Tab

### Patient Alert Thresholds

The image shows a screenshot of a database table titled "Patient Alert Thresholds." The table is used to set thresholds for various patient alerts, including **A1c**, **Adult Weight Screening**, **Asthma Severity**, **BMI**, **BMI Percentile**, and **BP**. Each alert has specific parameters such as **Diagnosis**, **Risk Factors**, **Mn**, **Max**, **Min2**, **Max2**, **Date**, **Age**, **Age Max**, **Sex**, **Enabled**, and **Action**.

1. **Alert**: A1c
   - **Diagnosis**: Diabetes
   - **Risk Factors**:
   - **Mn**: 1.0
   - **Max**: 7.0
   - **Min2**:
   - **Max2**: 180
   - **Date**: 0
   - **Age Max**: 85
   - **Sex**: B
   - **Enabled**: Enabled

2. **Alert**: Adult Weight Screening
   - **Diagnosis**:
   - **Risk Factors**:
   - **Mn**:
   - **Max**:
   - **Min2**:
   - **Max2**:
   - **Date**:
   - **Age**:
   - **Age Max**:
   - **Sex**: B
   - **Enabled**: Disabled

3. **Alert**: Asthma Severity
   - **Diagnosis**: Asthma
   - **Risk Factors**:
   - **Mn**: 36500
   - **Max**: 0
   - **Min2**: 85
   - **Max2**: B
   - **Date**:
   - **Age**:
   - **Age Max**:
   - **Sex**: Enabled

4. **Alert**: BMI
   - **Diagnosis**:
   - **Risk Factors**:
   - **Mn**: 365
   - **Max**: 18
   - **Min2**: 150
   - **Max2**: B
   - **Date**:
   - **Age**:
   - **Age Max**:
   - **Sex**: Disabled

5. **Alert**: BMI Percentile
   - **Diagnosis**:
   - **Risk Factors**:
   - **Mn**: 365
   - **Max**: 2
   - **Min2**: 17
   - **Max2**: B
   - **Date**:
   - **Age**:
   - **Age Max**:
   - **Sex**: Disabled

6. **Alert**: BP
   - **Diagnosis**: Diabetes, HTN, IVD
   - **Risk Factors**:
   - **Mn**: 1.0
   - **Max**: 130.0
   - **Min2**: 1.0
   - **Max2**: 80.0
   - **Date**: 365
   - **Age**: 85
   - **Age Max**: B
   - **Sex**: Enabled

This table is used to set and manage thresholds for various patient alerts to monitor and respond to patient health changes effectively.
Description of Patient Alert Threshold Columns

1. Alert Name- Name of the documentation event (process, result, test, etc.).

2. Diagnosis- Specific diagnosis or diagnoses for which the alert is active.
   Blank means the alert is active for all patients.

3. Risk Factors- Specific risk factor or factors for which the alert is active.
   Blank means the alert is active for all patients.

4. Minimum Value- Lowest result value expected. Most useful for data hygiene- ex. An a1c value less than 1 is likely to be a data entry error.

5. Maximum Value- Highest result value that will not trigger the alert. Used to set your standard for control. If you want to be alerted of Diabetics whose A1cs are >9, then you would set the value in this column to 9. Set it to a low number like 4 if you want to display most recent result for all A1cs, just be sure to inform staff it will still be labeled “out of range” on the report.

6. Minimum 2/Maximum 2- Same as Min1/Max1, but applies only to alerts that have two result values such as the diastolic and systolic of BP.
### Description of Patient Alert Threshold Columns

7. **Date** - Number of days the alert is set to appear. ex. A1c measures generally require an A1c every 6 months, so the alert would be set to 180 days. If your CHC prefers to do A1cs every 3 months, you would adjust the alert to 90 days. 365000 is the equivalent of infinite- meaning you only need to record it once to satisfy the alert.

8. **Age** - Minimum age for which the alert is active.

9. **Age Max** - Maximum age for which the alert is active.

10. **Sex** - Genders for which the alert is active. F= Female, M= Male, B= Both.

11. **Enabled?** - Displays which alerts are turned on/off for your CHC.

12. **Action** - Selection boxes for the action you choose. Enable alerts as a group, and disable alerts as a group. For example, select all alerts you want to enable by checking the associated box, then click the gear symbol and select “Enable.” If you want to disable some alerts, then select them, click the gear symbol, and select “Disable.” You can select all the alerts at once by clicking the box at the top of the column, next to the gear symbol.
Enabling and Disabling Alerts
# Enabling and Disabling Alerts

In the image, there is a table showing various alerts and their associated information, such as diagnosis, risk factors, and enabled status. The table includes alerts like A1c, Adult Weight Screening, Asthma Severity, BMI, and BMI Percentile. The enabled status is indicated by checkboxes, with options to enable or disable alerts.

### Example Table

<table>
<thead>
<tr>
<th>Alert</th>
<th>Diagnosis</th>
<th>Risk Factors</th>
<th>Mn</th>
<th>Max</th>
<th>Min2</th>
<th>Max2</th>
<th>Date</th>
<th>Age</th>
<th>Age Max</th>
<th>Sex</th>
<th>Enabled</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1c</td>
<td>Diabetes</td>
<td></td>
<td>1.0</td>
<td>7.0</td>
<td></td>
<td></td>
<td>180</td>
<td>0</td>
<td>85</td>
<td>B</td>
<td>Enabled</td>
<td></td>
</tr>
<tr>
<td>Adult Weight Screening</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>B</td>
<td>Enabled</td>
<td></td>
</tr>
<tr>
<td>Asthma Severity</td>
<td>Asthma</td>
<td></td>
<td>36500</td>
<td>0</td>
<td>85</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>B</td>
<td>Enabled</td>
<td></td>
</tr>
<tr>
<td>BMI</td>
<td></td>
<td></td>
<td>365</td>
<td>18</td>
<td>150</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>B</td>
<td>Enabled</td>
<td></td>
</tr>
<tr>
<td>BMI Percentile</td>
<td></td>
<td></td>
<td>365</td>
<td>2</td>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>B</td>
<td>Enabled</td>
<td></td>
</tr>
</tbody>
</table>

### Instructions

1. **Enable** or **Disable** alerts by selecting the appropriate checkbox.
2. **Confirm** changes by clicking the Success confirmation button.
Configuring Alert Timeframes

Your organization can choose to make the standard *stricter* or *more relaxed* depending on the goals of the organization.

- For example, you may choose to set the Mammogram alert for 700 days in the “Date” field, as opposed to the standard 730 days (2 years) so that the alert fires 30 days *before* the patient will be overdue for the screen, giving you a greater chance of meeting the measure.

- Please communicate to your staff that they need to check the date of the most recent mammogram to be sure that you don’t schedule it to occur before the point when insurance will cover it.
Configuring # of Days for Alerts

Click on the alert name in blue hypertext on the left of the Patient Alerts admin screen.
Configuring # of Days for Alerts

Look Back Days

• Type in the number of “Look Back Days” to customize the range. *Colon Cancer Screen and Adult Weight Screen cannot be configured* because they can be satisfied by multiple events with different date ranges.

Diagnosis

• Add diagnosis or diagnoses in the “Selected” section using the forward arrow.
• Use the “And” radio button to require a patient has *both* selected diagnoses for alert to appear.
• Use “Or” if you want the alert to appear if patient has *either* diagnosis. Most inclusive option.
Gender, Age, Result Targets, and Risk Factors

- Include or exclude a gender for an alert, adjust the minimum or maximum age for which the alert is active.

- Adjust target 1 and 2. BP is the only alert with 2 result targets.

- Finally, add a risk factor to limit the population to those patients with the selected risk factor(s).

**NOTE:** Modifications to patient alerts will not be reflected until the nightly job is processed.
Other Questions

• As always, please contact our support team by emailing support@azarahealthcare.com with any other questions you might have. We are happy to help!