

# DRVS Training

## Visit Planning Alerts Administration and Configuration for Your Practice



# The Admin Tab for Visit Planning- Overview

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- 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.

Alert	Relevant Specification Sources	Diagnosis	Min Value	Max Value	Min Value 2	Max Value 2	Look back Days	Min Age	Max Age	Gender
A1c	UDS, NQF 0059, NQF 0575	Diabetes	1	7	N/A	N/A	180	0	85	B
Adult Weight Screening	UDS, MU, NQF 0421		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.					18	85	B
Asthma Severity	UDS, MU, NQF 0001	Asthma	Process, non numeric result.				36500	0	85	B
BMI	NQF 0421, ACO 16		Process, date of most recent.				365	18	150	B
BMI Percentile	UDS, MU, NQF 0024		Process, date of most recent.				365	2	17	B
BP	UDS, MU, CQM NQF 0013, NQF 0018, NQF 0061, ACO 21, ACO 24	Diabetes, HTN, IVD	1	130	1	80	365		85	B
Colorectal Cancer Screening	MU, NQF 0034		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.					50	75	B
Dental Visit	PCMH, MU, ADA		Process, date of most recent.				365	0	150	B
Depression Screening	MU, UDS, PCMH, NQF 0418, ACO 18		Process, date of most recent.				365	18	150	B
Eye Exam	NQF 0055	Diabetes	Process, date of most recent.				365	0	85	B
Flu	MU, UDS, NQF 0041, ACO 14		Process, date of most recent.				365	1	85	B
Foot Exam	NQF 0056	Diabetes	Process, date of most recent.				365	0	85	B
LDL	NQF 0064	Diabetes, HTN	1	100	N/A	N/A	365		85	B
Mammogram	MU, UDS, NQF 0031, ACO 20		Process, date of most recent.				730	40	70	F
Nephropathy Screen	NQF 0062	Diabetes	Process, date of most recent.				365	0	85	B
Nutritional Counseling	UDS, MU, NQF 0024		Process, non numeric result.				365	2	17	B
Pap Smear	MU, UDS, HRSA PCMH FY2012		Process, date of most recent.				1095	24	65	F
PCV (Pneumoccal Vaccine)	HRSA HDC, UDS, NQF 0041, ACO 15	Diabetes	Process, date of most recent.				36500	65	85	B
Physical Activity Counseling	UDS, MU, NQF 0024		Process, non numeric result.				365	2	17	B
Tobacco Cessation	UDS, NQF 0028, ACO 17		Process, date of most recent.				365	18	150	B
Tobacco Status	UDS, MU, NQF 0027		Process, date of most recent.				365	18	150	B

Risk Factor Displayed Value	Risk Factor Name	Description	Patient Inclusion Logic
Pregnancy	Pregnancy	Active pregnancy.	V22.0, V22, V22.1, V22.2, V23.2V23.86, V23.2, 651.03, 761.5, 646.8, 643.8, 640%-648.9, 679%
OBS	Obesity	Patent is obese.	Most recent BMI is >30
TOB	Tobacco User	Pt. uses tobacco.	Most recent tobacco status = current tobacco user
SMIP	Severe Mental Illness / Psychosis	Active Dx of Severe Mental Illness and/or Psychosis.	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, 291.5, 292, 292.0, 292.1, 292.11, 292.12, 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%)
SAD	Substance Abuse / Dependency	Active Dx of either or both.	Alcohol Abuse (305.00), Alcohol Dependency (303%), Drug Abuse (305%), Drug Dependency (304%)

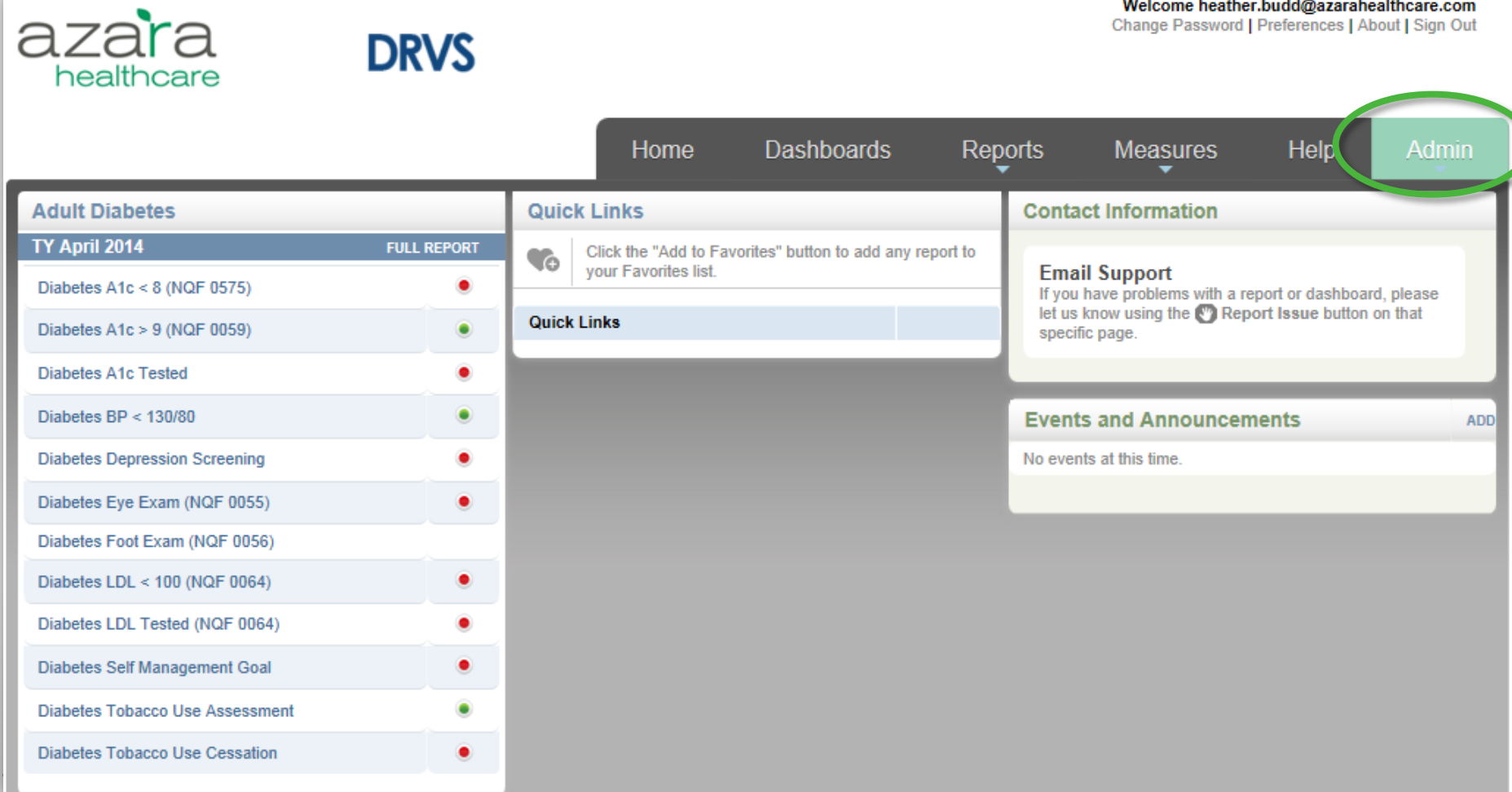
# The Admin Tab for Visit Planning- Overview

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- 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.



The screenshot displays the Azara Healthcare DRVS dashboard. The navigation menu at the top includes Home, Dashboards, Reports, Measures, Help, and Admin. The Admin tab is highlighted with a green circle. The dashboard content is divided into three main sections: Adult Diabetes, Quick Links, and Contact Information.

**azara healthcare** **DRVS**

Welcome heather.budd@azarahealthcare.com  
Change Password | Preferences | About | Sign Out

Home Dashboards Reports Measures Help **Admin**

**Adult Diabetes**

TY April 2014 FULL REPORT

Diabetes A1c < 8 (NQF 0575)	●
Diabetes A1c > 9 (NQF 0059)	●
Diabetes A1c Tested	●
Diabetes BP < 130/80	●
Diabetes Depression Screening	●
Diabetes Eye Exam (NQF 0055)	●
Diabetes Foot Exam (NQF 0056)	●
Diabetes LDL < 100 (NQF 0064)	●
Diabetes LDL Tested (NQF 0064)	●
Diabetes Self Management Goal	●
Diabetes Tobacco Use Assessment	●
Diabetes Tobacco Use Cessation	●

**Quick Links**

Click the "Add to Favorites" button to add any report to your Favorites list.

**Quick Links**

**Contact Information**

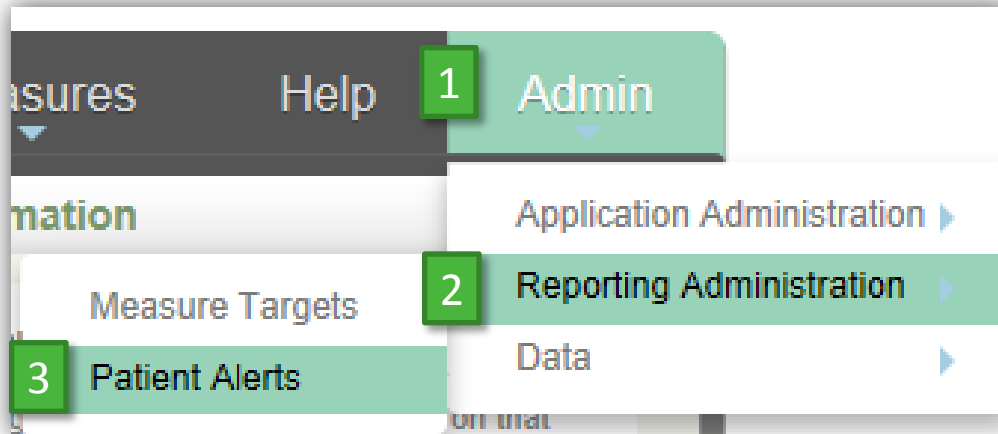
**Email Support**  
If you have problems with a report or dashboard, please let us know using the Report Issue button on that specific page.

**Events and Announcements** ADD  
No events at this time.

# Accessing the Admin Tab

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1. Click on the “Admin Tab.”
2. Scroll to “Reporting Administration.”
3. Select “Patient Alerts.”



# Orientation to the Admin Tab

## Patient Alert Thresholds

Administration Dashboard > Patient Alerts

Center: Lawn Court CHC

Show 1 to 21 of 2 entries (filtered from 126 4 entries) 5 6 7 8 9 10 11 12

Alert	Diagnosis	Risk Factors	Mn	Max	Min2	Max2	Date	Age	Age Max	Sex	Enabled	Action
											[All] v	<input type="checkbox"/> ⚙
A1c	Diabetes		1.0	7.0			180	0	85	B	Enabled	<input type="checkbox"/>
Adult Weight Screening										B	Disabled	<input type="checkbox"/>
Asthma Severity	Asthma						36500	0	85	B	Enabled	<input type="checkbox"/>
BMI							365	18	150	B	Disabled	<input type="checkbox"/>
BMI Percentile							365	2	17	B	Disabled	<input type="checkbox"/>
BP	Diabetes,HTN,IVD		1.0	130.0	1.0	80.0	365		85	B	Enabled	<input type="checkbox"/>
Colorectal Cancer Screening										B	Enabled	<input type="checkbox"/>

# 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


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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

Enabled	Action
[All] v	<input type="checkbox"/> ⚙
Enabled	<input checked="" type="checkbox"/> 
Disabled	<input type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Disabled	<input type="checkbox"/>
Disabled	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Enabled	<input type="checkbox"/>
Disabled	<input checked="" type="checkbox"/>
Disabled	<input type="checkbox"/>

Enabled	Action
[All] v	<input checked="" type="checkbox"/> ⚙ 
Enabled	<input checked="" type="checkbox"/>
Disabled	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Disabled	<input checked="" type="checkbox"/>
Disabled	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Enabled	<input checked="" type="checkbox"/>
Disabled	<input checked="" type="checkbox"/>
Disabled	<input checked="" type="checkbox"/>

Enabled	Action
[All] v	<input type="checkbox"/> ⚙ 
Enabled	<input checked="" type="checkbox"/>

Enable 

Disable 

# Enabling and Disabling Alerts

1

Alert	Diagnosis	Risk Factors	Mn	Max	Min2	Max2	Date	Age	Age Max	Sex	Enabled	Action
											[All] v	<input type="checkbox"/>
A1c	Diabetes		1.0	7.0			180	0	85	B	Enabled	<input type="checkbox"/>
Adult Weight Screening										B	Enabled	<input type="checkbox"/>
Asthma Severity	Asthma						36500	0	85	B	Enabled	<input type="checkbox"/>
BMI							365	18	150	B	Disabled	<input checked="" type="checkbox"/>
BMI Percentile							365	2	17	B	Disabled	<input checked="" type="checkbox"/>

Enable  
Disable

2

Success

Center: All Centers

Showing 1 to 126 of 126 entries

Alert	Diagnosis	Risk Factors	Mn	Max	Min2	Max2	Date	Age	Age Max	Sex	Enabled	Action
											[All] v	<input type="checkbox"/>
A1c	Diabetes		1.0	7.0			180	0	85	B	Enabled	<input type="checkbox"/>
Adult Weight Screening										B	Enabled	<input type="checkbox"/>
Asthma Severity	Asthma						36500	0	85	B	Enabled	<input type="checkbox"/>
BMI							365	18	150	B	Enabled	<input type="checkbox"/>
BMI Percentile							365	2	17	B	Enabled	<input type="checkbox"/>

# Configuring Alert Timeframes

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**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.

1

Alert	Diagnosis	Risk Factors	Mn	Max	Min2	Max2	Date	Age	Age Max	Sex
<a href="#">Foot Exam</a>	Diabetes						365	0	85	B
<a href="#">LDL</a>	Diabetes,HTN		1.0	100.0			365		85	B
<a href="#">Mammogram</a>							730	40	70	F

# 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.

**Edit Alert - Mammogram**

Administration Dashboard > Patient Alerts > Edit Alert

Center ID : Clark Street CHC

Display Name : Mammogram

Description : Checks for mammogram in adult female patients.

Look Back Days : 700

Enabled

Diagnosis

Unselected

- diabetes
- hiv
- asthma
- htn
- depression
- copd
- chf
- cad
- ivd

Selected

And  
 Or

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

SUBMIT CANCEL

# 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).

The screenshot shows a configuration interface for patient alerts, divided into three sections: Demographics, Targets, and Risk Factors. Green arrows point to the 'Both' dropdown in the Gender field, the '100' value in the Max age field, the '140' value in the Max field for Target 1, the '90' value in the Max field for Target 2, and the empty Selected risk factor box.

Section	Field	Value
Demographics	Gender	Both
	Age (Max)	100
Targets	Target 1 (Max)	140
	Target 2 (Max)	90
Risk Factors	Selected	(Empty)

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

SUBMIT

CANCEL

# Other Questions

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- As always, please contact our support team by emailing [support@azarahealthcare.com](mailto:support@azarahealthcare.com) with any other questions you might have. We are happy to help!