**Issues for the Aliados Health Data Standards and Integrity Council**

**September 11, 2023 Meeting**

Version 1, By Ben Fouts MPH, Aliados Health Data Analyst

1. **Using the Epic** **Health Maintenance Module to Satisfy Quality Measure Numerators**

Issue: Gain an agreement on a standard approach to satisfy Quality Measure numerators using data from the Epic Health Maintenance Module. This topic is specific to what kinds of data should be allowed or not allowed to contribute to records on Relevant Data Elements used for Relevant Quality Measures.

Description: A description of the Health Maintenance Module from OCHIN:

*Health Maintenance (Care Gaps) is a powerful clinical decision support tool with a suite of functions to help close care gaps and improve quality of care.*

*The purpose of Health Maintenance:*

* *Track routine screenings, immunizations, and other preventive care*
* *Manage patients with chronic diseases*
* *Provide a surveillance mechanism for conditions flagged by abnormal screening results*

Health Maintenance Considerations from OCHIN:

1. *Health Maintenance can aid in tracking patient status, but it is not considered for UDS reporting purposes.*
2. *The preferred workflow for organizations to document non-interfaced lab results is to use Enter/Edit results. HRSA requires that results be included in the patient’s chart for UDS reporting and auditing purposes. It is up to each organization to ensure that results are documented appropriately.*
3. *Per HRSA 2022 guidance, If a needed service is viewable and accessible in the patient health record directly, or through health information exchange or read-only EHR access, it may count toward compliance as long as it meets the specified numerator criteria. It is up to each organization to ensure that results are documented appropriately*

Within the Health Maintenance module, there are different actions that can be taken to manage Health Maintenance topics. Just because a particular Health Maintenance topic is not active in Epic for a patient, that does not necessarily mean the corresponding Quality Measure numerator criteria is satisfied for the patient. For example, some measures require documentation like the date of the lab test and the lab result. In another example, the Partnership ECDS submission for depression requires the depression screen date and the score. Unless this data appears in the standard locations defined by OCHIN/EPIC, the numerator for the measure would not be satisfied no matter what other actions are taken in Health Maintenance. Remember that all data used for reported Quality Measures must stand up to an audit.

Proposed Standardization:

Actions that will satisfy a Quality Measure numerator: see the three measures in Topic #2 below. Generally, the descriptions used are from the “Automatic” “Manual,” and “UDS Reporting” headings for these measures in the document *OCHIN Epic Health Maintenance (HM) Contents Volume I: Adult HM Topics (August 8, 2022).*

Actions that will not satisfy a Quality Measure numerator without other documentation or results entered into the appropriate and standard sections or fields in Epic.

* Typing notes about “completed” labs and procedures into free text or non-structured fields in Epic
* Some types of SmartPhrases. This depends on the topic and the recommended standard from OCHIN/Epic (which we may consider in future DSIC meetings). For example, a health center should not create a custom SmartPhrase like .PAPdone and use it instead of actual documentation of cervical cancer screening in the patient’s record
* Discontinuing or Postponing a Health Maintenance item
* Marking a Health Maintenance item as an Unsuccessful Attempt
* Completing a Health Maintenance topic manually using reasons of Done or Managed by Outside Provider and **not** including a scan of the resulted screening procedure and **not** indexing it into the patient’s chart

If we reach an agreement to enter data in a particular way and only take certain actions to satisfy the Quality Measures, we are agreeing to not direct Relevant to use other means to gather the data and display it on the Data Elements.

1. **Using the Epic Health Maintenance Module to Satisfy Three Cancer Screening Quality Measure Numerators**

Quality Measures: Breast Cancer Screening, Cervical Cancer Screening and Colorectal Cancer Screening

Issue: Gain an agreement on a standard approach to satisfy three Quality Measure numerators using data from the Epic Health Maintenance Module. This topic is specific to what kinds of data should be allowed or not allowed to contribute to records on Relevant Data Elements used for Relevant Quality Measures.

Proposed Standardization:

**Breast Cancer Screening**

The **SOGI Organ Inventory** (which is part of the Sexual Orientation and Gender Identity [SOGI] SmartForm) can impact the behavior of this Health Maintenance topic. This section uses “documentation by exception,” meaning that organs are “as expected” (i.e., anatomy matches legal sex) and it is okay to leave this section blank. If the **Gender Identity** section of the SOGI SmartForm about the **Patient’s Sex Assigned at Birth** indicates the patient should have female-specific Health Maintenance topics displayed, then the breast cancer screening Health Maintenance topic would appear *unless* the absence of breasts is indicated on the SOGI Organ Inventory.

Patient Population:

* Average-risk patients ages 50 to 74 with breasts present in the SOGI Organ Inventory
* Elevated-risk patients ages 40 to 74 with breasts present in the SOGI Organ Inventory

Automatic Completion

* The patient’s record contains one of the **resulted** satisfying mammography screening procedures (preferred)
* The patient’s record contains a document scanned and indexed using OnBase, with type IMA-Mammogram.

Manual Completion

* Health Maintenance topic (breast cancer screening) completed manually using reasons of **Done** or **Managed by Outside Provider** and must include a scan of the resulted screening procedure indexed into the patient chart (see second bullet above)

**Cervical Cancer Screening**

The SOGI Organ Inventory approach mentioned above for breast cancer screening also applies to cervical cancer screening. In this case, the *absence* of a cervix in the organ inventory would prevent the cervical cancer screening Health Maintenance topics to be displayed for patients expected to have female-specific Health Maintenance topics.

There is one Cervical Cancer Screening Health Maintenance combo topic that automatically assigns a default screening plan (Pap Smear, Frequency: Q3y) for all average-risk patients who meet age and organ inventory criteria. The provider can change the Health Maintenance plan screening type and frequency for individual patients.

Patient Population: Ages 21-65 for whom the SOGI Organ Inventory indicates a cervix and no exclusions (hysterectomy).

Automatic Completion

* The patient’s record contains one of the **resulted** cervical cancer screening procedures that satisfies their current Health Maintenance Cervical Cancer Screening topic (preferred)
* The patient’s record contains a document, scanned and indexed using OnBase, with types:
  + LAB – Pap Smear HPV
  + LAB – Pap Smear

Manual Completion

* Health Maintenance topic (cervical cancer screening) completed manually using reasons of **Done** or **Managed by Outside Provider** and must include a scan of the resulted screening procedure indexed into the patient chart (see second bullet above)

**Colorectal Cancer Screening**

There is one Colorectal Cancer Screening Health Maintenance combo topic that automatically assigns a default screening plan (gFOBT/FIT Q1y). The provider can change the Health Maintenance plan screening type and frequency for individual patients.

Patient Population: All patients ages 45-75

Automatic Completion

* The patient’s record contains one of the **resulted** colorectal cancer screening labs or procedures that satisfies the patient’s current Health Maintenance subtopic/Screening Type (preferred)
* The patient’s record contains a document, scanned and indexed using OnBase, with type:
  + o LAB – FIT
  + o PRO – Colonoscopy
  + o PRO – Sigmoidoscopy

Manual Completion

* Health Maintenance topic (colorectal cancer screening) completed manually using reasons of **Done** or **Managed by Outside Provider** and must include a scan of the resulted screening procedure indexed into the patient chart (see second bullet above)