



National Dementia Care Collaborative

Getting to Yes for Launch: GUIDE Participants Overcoming Challenges to Using your Electronic Health Record (EHR) to Implement Comprehensive Dementia Care

February 13, 2025



Agenda

- Welcome
- National Dementia Care Collaborative Overview
- Presenters:
 - The UCLA Alzheimer's and Dementia Care Program
 - Integrated Memory Care



The UCLA Alzheimer's and Dementia Care Program

- APP led model
- Mission: partner with families, physicians, and community organizations to maximize the person living with dementia(PLWD)'s function, independence, and dignity, while minimizing caregiver strain and burnout.
- Approaches the PLWD and caregiver as a dyad who both need support
- First patient: July 11, 2012
- Current state:
 - Compass Rose, EHR/Manual reporting
- Future State:
 - Continuing EPIC feature building

Emory

- NP led clinic
- Primary care for persons living with dementia
 - Comprehensive medical care, education & support
- 10th Anniversary
- Current State
 - Manual tracking
 - Spreadsheets, spreadsheets, spreadsheets
 - Ad hoc report
- Future State
 - Compass Rose



Health



EPIC GUIDE Build Overview



- Pre-Visit
- Clinic Visit/Virtual Visit
- Care Coordination
- Program Management
- Submissions and Alignment
- Patient Family Communication
- CBO Communication

Pre-Visit Overview

GUIDE Considerations	EPIC Functions
<ul style="list-style-type: none">• Eligibility• Scheduling/Enrollment• Pre-Visit Preparation	<ul style="list-style-type: none">• Referral Workqueue• Compass Rose Management• EPIC Healthy Planet• Electronic Questionnaires

Pre-Visit

GUIDE Considerations	EPIC Functions
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Eligibility

PLEASE NOTE:
Referrals placed as urgent will undergo a review by one of our Dementia Care Specialists to review urgency for priority scheduling. Urgent referral criteria includes:

- PWD living alone without a caregiver
- Recurrent hospitalization (>3 hospitalizations within 6 months)
- Behavior disturbances that include:
 - o Physical aggression
 - o Concerns for immediate safety for patient or caregiver

- Referral/Referral Workqueue
- Compass Rose Management
Case Team, Outreach Management, Patient Status
- Healthy Planet
Episode of Care Smartform

ADC Referral

Class: **Internal Referral** External Referral

Referral: Override Restrictions

To Department: **GERI ADC GUIDE WW MP2**

To Department Specialty: **Medicine, Geriatric Medicine**

Reason: **Specialty Services Required**
 Second Opinion
 Patient Preference
 No UCLA Provider in the area (Ext Ref Only)
 UCLA Provider in the area with a delay in access (Ext Ref Only)
 Continuity of Care Other

Priority: **Routine** Urgent Elective

Number of Visits:

Does patient have Dementia? Yes No

Is this an Urgent Referral? Yes No

Is patient still driving? Yes No

Patient's preferred location:

Forms

ADC Information

Program Details

Program ID:

Patient Continuing with Program? Yes No

Status:

Date of Initial Visit:

Insurance Type:

Acuity Score

Current Acuity Score:

Date Noted:

Guide Details

Guide Program ID:

Guide Date:

Guide Aligned: Yes

Guide Tier Levels

Dyad Tiers:

Individual Tiers:

Episode of Care

Pre-Visit

GUIDE Considerations

EPIC Functions

Scheduling/Enrollment

- Appointment Desk
- Compass Rose Management
Update Case Team, Outreach Management, Patient Status
- Healthy Planet
Update Episode of Care Smartform
- Electronic Pre-Visit Questionnaire (e-PVQ)
*E-PVQ mapped to flowsheets
Flowsheet then mapped to smartphrase*

E-PVQ

Pre-Visit

GUIDE Considerations

Pre-Visit Preparation

Patient information, tool collection, caregiver demographics

EPIC Functions

- Electronic Pre-Visit Questionnaire (e-PVQ)
E-PVQ mapped to flowsheets
Flowsheet then mapped to smartphrase

The screenshot displays the EPIC E-PVQ Flowsheet interface. At the top, there are navigation options: 'Accordian', 'Expanded', and 'View All'. A search bar contains '1300' and a date '2/10/2025'. Below the search bar, the 'ASSESSMENT TYPE:' section is highlighted in purple, with 'Initial Assessment Type' selected. The 'PATIENT INFORMATION' section includes fields for 'Patient resides in:', 'Select to confirm patient is not a longterm nursing home resident', 'Patient Medicare Beneficiary Identifier:', 'Patient Medicaid ID number: (if applicable)', and 'Patient dementia stage:'. The 'SCORES' section includes 'FAST (enter numerical score):' and 'PROMIS Total Score'. The 'PCP INFORMATION' section includes 'Does the patient have a primary care provider:', 'If Yes, Name of primary care provider:', and 'Phone number of primary care provider:'. The 'CAREGIVER' section includes 'Does patient have a caregiver, defined as a relative, or an unpaid nonrel...', 'Primary Caregiver First Name:', 'Primary Caregiver Street Address:', 'Primary Caregiver State:', 'Primary Caregiver Zip Code:', 'Primary Caregiver Email Address:', 'Primary Caregiver Phone Number (###-###-####):', 'Primary Caregiver Phone Type:', 'Primary Caregiver Date of Birth (YYYY-MM-DD):', 'Primary Caregiver Sex:', and 'Primary Caregiver Race (If this information is not disclosed, please selec...)'.

E-PVQ Flowsheet

Pre-visit

- **Recruitment**

- Sending EMR messages to existing patient panels
 - Lots of phone/messages
 - Developing FAQ document

- **Eligibility screening**

- **Visit Questionnaires**

- Fillable PDF
- Sent ahead of appt
- Portal, email, fax for return
- Packets for in person visits

Clinic Visits/Virtual Visits Overview

GUIDE Considerations

- Video Visit
- Collection of Information for GUIDE requirements
- Post-visit education for caregiver

EPIC Functions

- MyChart video
- Flowsheets
- Referrals
- After Visit Summary
- Healthy Planet

Clinic/Virtual Visits

GUIDE Considerations	EPIC Functions
<ul style="list-style-type: none">• Video Visit• Collection of Information for GUIDE requirements <p><i>Cognitive screening, caregiver demographics, PROMIS 10 and Zarit, HRSN, FAST, etc.</i></p>	<ul style="list-style-type: none">• MyChart video <i>Virtual visit encounter</i>• Flowsheets <i>Flowsheets will map to smartphrase</i>• Smartphrases• Compass Rose <i>Updating complexity tier on program support and services</i>• Healthy Planet <i>Updating episode of care to indicate complexity tier</i>

Status: Active | Identified | **Active** | Waitlisted | Closed | Declined

Enrollment Date: 12/18/2024

[Edit Pause Details](#)

Support & Services Provided:

- Green Acuity
- Yellow Acuity
- Red Acuity
- Low Complexity Tier with CG
- Moderate Complexity Tier with CG
- High Complexity Tier with CG
- Low Complexity Tier without CG
- Mod/High Complexity Tier without CG
- SW Red Acuity
- SW Yellow Acuity
- SW Green Acuity

Type	Start Date	End Date
Green Acuity	12/18/2024	
Low Complexity Tier without CG	12/18/2024	

Updated Compass Rose Support and Services

Forms

ADC Information

Program Details

Program ID: []

Patient Continuing with Program? **Yes** No

Status: **Active** New In process

Date of Initial Visit: []

Insurance Type: Medicare A&B Med Group Commercial/Other **Guide Eligible**

Acuity Score

Current Acuity Score: Red **Yellow** Green

Date Noted: 1/8/2024

Guide Details

Guide Program ID: []

Guide Date: []

Guide Aligned: Yes

Guide Tier Levels

Dyad Tiers: Low complexity DYAD tier Moderate complexity DYAD tier High complexity DYAD tier **Moderate complexity dyad tier**

Individual Tiers: Low Complexity INDIVIDUAL Tier Moderate to High Complexity INDIVIDUAL Tier

Updated Episode of Care

**UCLA Alzheimer's and Dementia Care Program
Intake Assessment & Care Plan**

Time Start: ***

Date: @TODAY@

Name: @NAME@ MRN: @MRN@
 DOB: @DOB@ @AGE@ Sex: @SEX@
 Phone Number: @PH@
 Mailing address: @ADD@
 Primary language spoken: @LANGUAGE@

Caregiver/Decision maker:
 Name/Relationship: ***

Linked Smartphrase

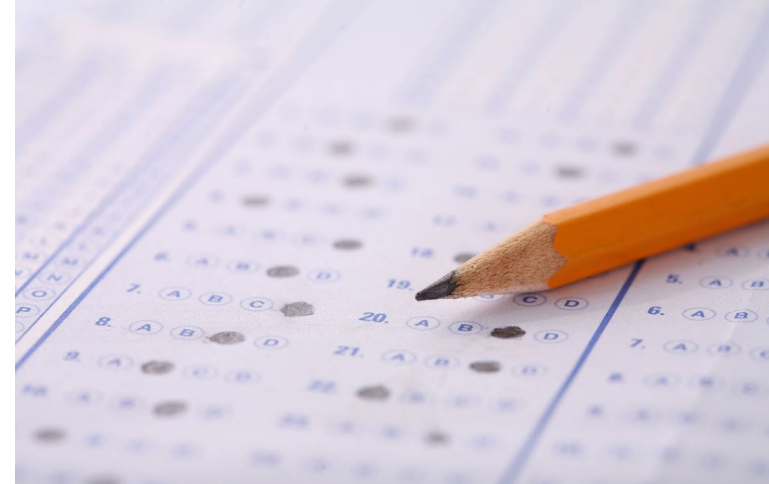
Clinical visit

- **Unique visit types in Epic**
 - GUIDE Intake
 - GUIDE Follow-Up
 - GUIDE Home Assessment

- **Centralized Intake Clinician**
 - Streamline work-flow
 - Less chance of confusion
 - F/u with regular clinician after initial
 - Primary provider for existing patients does CDR

Questionnaires

- Fillable forms/paper
 - For virtual visits, confirm returned forms prior to visit
- Scanned into EMR with labels
 - ZBI 1/1/25
 - PROMIS 1/1/25
 - HRSN 1/1/25
 - CDR 1/1/25



Submissions and Alignment

GUIDE Considerations	EPIC Function
<ul style="list-style-type: none">• Collection of GUIDE submissions requirements	<ul style="list-style-type: none">• Smartforms map to flowsheets <i>Flowsheets map to a report for weekly GUIDE submission</i>

Care Coordination Overview

GUIDE Considerations	EPIC Functions
<ul style="list-style-type: none">• Ongoing panel management• Identify enrolled status of the patient• Optimize dementia management quality measures maker• Billing Tracking	<ul style="list-style-type: none">• Compass Rose Care Management• Care Coordination Note• Advance Care Planning Module• Best Practice Alert (BPA)• Care Everywhere

Care Coordination

GUIDE Considerations	EPIC Features:
<ul style="list-style-type: none"> Ongoing panel management Identify enrolled status of the patient Billing Tracking 	<ul style="list-style-type: none"> Care Coordination Note Care Everywhere Compass Rose Care Management <ul style="list-style-type: none"> Support and services build out <ul style="list-style-type: none"> Complexity tier populates checklist assigned to designated staff member Billing tier populates a billing checklist for responsible staff Individual user checklist dashboard

The screenshot shows a user interface for managing tasks. At the top, there is a search bar with 'Add tasks' and a '+ Add' button. Below this, there are two sections: 'Appointments' and 'Billing'. Each section has a 'Bulk Actions' dropdown menu. The 'Appointments' section shows a task for 'JAN 09 2025' with a checked checkbox, titled 'M6Y: SW 6 Month Assessment Scheduling', completed by 'Romero, Cristina Isabel' on '1/9/2025', with source 'Yellow Acuity - 12/27/2024'. The 'Billing' section shows a task for 'FEB 13 2025' with an unchecked checkbox, titled 'Moderate Complexity Tier with CG Bill Submission (Month 7+, DCMP G0525)', with source 'Moderate Complexity Tier with CG - 12/27/2024'.

Individual Checklists (Complexity Tier and Billing Checklist)

The screenshot shows a dashboard titled 'My Incomplete Checklist Tasks'. It features two large numbers: '54' in a red box labeled 'Overdue' and '0' in a green box labeled 'Due Today'. Below these are four rows of data showing task counts by due date category:

Due	Total Tasks
> Overdue	54
Due Today	0
Due within Next 7 Days	0
> Upcoming	2
> [No Value]	34

Individual User Checklist

The screenshot shows the Care Everywhere interface. At the top left is the Care Everywhere logo. To its right is a navigation menu with 'Overview' selected. Further right are icons for 'Documents', 'Labs', and 'Other Results'. On the top right, there are buttons for 'Update' and 'Find Outside Charts', along with a settings icon and a close button. The main content area is titled 'Electronic Case Reporting' and includes a sub-header 'Updated 02/16/22'. Below this, there are four columns: 'Summary' (Doesn't Allow Requests, No summaries received), 'Documents' (three items: Non-XML Document 02/16/22, Clinical Support 02/16/22, Non-XML Document 02/16/22), and 'Results' (No results received). A 'View All' link is at the bottom right of the documents list.

Care Everywhere

The screenshot shows a 'Patient Care Coordination Note' dated Sep 22, 2023, at 4:30 PM. The text is partially redacted with black boxes. The note states: 'Should this patient need to be hospitalized, please attempt for this patient to be treated at [redacted]'. It also mentions: 'is part of the UCLA Alzheimer's and Dementia Care Program. For dementia related questions or concerns, please call [redacted]'. A section titled 'Dementia Care Specialist:' is followed by a redacted name. A section titled 'Please call Dementia Care Specialists for:' is followed by a bulleted list:

- New or worsening dementia related behaviors (i.e. hallucinations, delusions, agitation, etc.)
- Emergency Room Visits, Hospitalizations/Psychiatric Admissions
- Caregiver stress/crisis
- Goals of Care

Patient Care Coordination Note

Care Coordination

GUIDE Considerations EPIC Features:

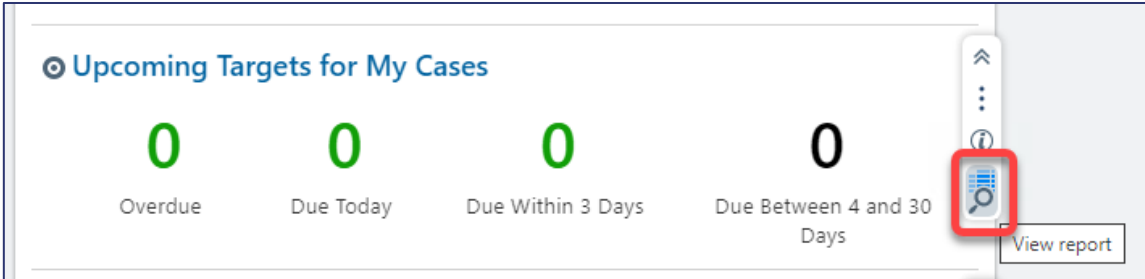
- | | |
|--|--|
| <ul style="list-style-type: none"> • Optimize dementia management quality measures <ul style="list-style-type: none"> • Use of high-risk medications, reduce severity of dementia related behaviors, reduce caregiver stress and strain, and confirm surrogate decision maker | <ul style="list-style-type: none"> • Targets • Individual user dashboard- Target Report • Advance Care Planning Module • Best Practice Alert (BPA) |
|--|--|

Targets Alzheimer's and Dementia Care Program

Add targets Show: Completed

Targets	Due	Outcome
Upcoming		
Outcome: reduce symptoms of depression	12/18/2025	✓ Mark Complete ✕
Outcome: reduce severity of dementia-related behavior disturbances	12/18/2025	✓ Mark Complete ✕
Outcome: reduce High Risk medication utilization	12/18/2025	✓ Mark Complete ✕
Outcome: reduce caregiver stress/strain	12/18/2025	✓ Mark Complete ✕
Confirm surrogate decision maker	12/18/2025	✓ Mark Complete ✕

Targets



Targets on dashboard

Outpatient Medications

sacubitril-valsartan (ENTRESTO) 4 mg/mL PO oral suspension	0.8 mg/kg, 2 times daily
diphenhydrAMINE (BENADRYL ALLERGY) 25 mg PO capsule	25 mg, Every 6 hours PRN
Patient not taking Reported on 12/16/2024	
benztropine (COGENTIN) 0.5 mg PO tablet	0.5 mg, 2 times daily
acetaminophen (TYLENOL) 500 mg PO tablet	1,000 mg, Every 6 hours PRN

Clinic-Administered Medications

rabies immune globulin 1500 units/5 mL inj 1,410 Units	20 Units/kg, Once
lidocaine Urojet 2% jelly 1 Application	1 Application, Once

UCLA 16TH STREET PHARMACY (MOB) (310-206-3784) 424-259-8520

Mark All Taking | Mark as Reviewed | Last Reviewed by Family Medicine, Physician, MD on 3/19/2024 at 8:22 AM

Associate Signed Orders

Visit Orders

There are 3 orders signed or released this visit. View Orders

OurPractice Advisories

Care Suggestions (Measure: 1)

High Risk Medications

Patient is undergoing treatment with the medication(s) below, which are identified high-risk medication in older adults. See Table 1. Please review the medications below to determine if they are still appropriate.

benztropine - 0.5 mg
diphenhydrAMINE - 25 mg

Acknowledge Reason

Medication appropriate | Trial at dose reduction

BPA Alert

Customize Workspace: Office Visit

Drag things to where you'd like them.

Occasionally used items go here

Drag and drop to rearrange

Drag and drop between menus

Drop things here to get them out of the way

Good spot for thing you don't use

Advance Care Planning

Care Coordination

- No differences in care coordination for GUIDE vs others
- OT contracted for home visit
 - Developed home safety and function checklist
 - Refer through a portal, get checklist and comments back through portal

Program Management

GUIDE Considerations	EPIC Functions
<ul style="list-style-type: none">• Reporting• Program Performance Measures• Program Billing Tracking	<ul style="list-style-type: none">• Episode of Care Smartform Reporting• Compass Rose Program Dashboard• Referral Workqueue

Program Management

GUIDE Considerations

- Patient Reporting

EPIC Functions

- Episode of Care Reporting
 - Enrolled patients by provider*
 - Program status*
 - GUIDE complexity tier*

Alzheimer's and Dementia Care Program Active Episode Distinct Patients [62389] as of Thu 9/3/2020 10:08 AM

MRN	Patient Name	DOB	ADC Acuity Scr. DCS	NP	Episode Status	Episode Creation Date	Discharge Date	Last Pt Outreac	ADC Episode P	Research
4488534	Cadence, Sarah	07/04/1976			Active	08/25/2020	8/25/2020	09/02/2020		Active
4592447	DataLink, Test4	05/06/1948	Green		Active	08/06/2020		08/02/2019		
4592919	Ayac, Demo1	07/17/1985			Active	07/27/2020		01/27/2020		
4592951	Ccm, Bob	07/23/1974			Active	08/24/2020		08/24/2020		
4592969	Sdohwheel, Demo1	07/26/1987			Active	07/07/2020		07/29/2019		Lewy body dementia (HCC/RAF)
4592990	Story, Aurora	02/18/1988			Active	07/22/2020		04/06/2020		Active
4593890	Covid, Screening1	03/18/1945			Active	08/27/2020				
4594466	Patient, Adc New	09/09/1945			Active	07/22/2020				
4594486	Patient, Adc New2	08/13/1993	Red		Active	07/27/2020				

AMBADC SnapShot

Demographics

Sarah Cadence
44 year old female
7/4/1976
Comm Pref:
Works at Accenture

2243 Jackson St
LOS ANGELES CA 90024
310-764-8754 (M)
310-987-7692 (W)

Active Health Care Agents

There are no active Health Care Agents on file.

Advance Care Planning Documents

There are no Advance Care Planning documents on file.

Advance Care Planning Notes

This patient has no ACP notes on file.

27 of 27 results loaded

Episode of Care Reporting

Program Management

GUIDE Considerations	EPIC Functions
<ul style="list-style-type: none">• Program Performance Measures• Program Billing Tracking	<ul style="list-style-type: none">• Compass Rose<ul style="list-style-type: none">• Program Dashboard<ul style="list-style-type: none"><i>Target tracking</i><i>Program performance tracking</i>• Support and Service breakdown• Referral Workqueue<ul style="list-style-type: none"><i>SW Referrals</i>

Alzheimer Dementia Guide Program Dashboard

Operational

ADC Guide Current Program Volume
Report completed: Tue 2/11 12:34 PM

1,515 ADC Guide
Current Patient Enrollment

CoCM Declined Patients - ADC Guide
Report completed: Tue 2/11 12:34 PM

53 Number of Patients Declined
ADC Guide

CoCM Disenrolled Patients - ADC Guide

▶

Report: Number of Patients with closed ADC Guide Program

ADC Guide All Visit Data
Last Seven Days

137 Total of
Appointment Events

Appt Status	Status
Arrived	9
Canceled	42
Completed	60
Left Without Being Seen	1
No Show	1
Scheduled	24
Total count	137

Case Management

Cases Without Responsible Staff

151 Cases

Episode Type	Number of Cases
> Alzheimer Dementia Guide	151
Total count	151

Caseload by Dementia Care Specialist

Episode Responsible Staff	Number of Cases
> ADC GUIDE TASK PSR POOL	1
> Escalante, Winnila May Q., NP	243
Active	216
Identified	27
> Everison, Leslie C., NP	66
Active	65
Identified	1
> GERI ADC GUIDE WW PSR	1
> Jimenez, Ivette A., NP	280
Active	275
Identified	5
> Lee, Kristine S., NP	283
Active	260
Identified	23
> Munier, Timothy M., NP	68
> Panillo, Michelle T., NP	120
Active	105
Identified	15
> Reeves, Kemi I., NP	83
Active	82
Identified	1

Task Management

Targets

0	0	0	0
<small>Overdue</small>	<small>Due Today</small>	<small>Due Within Week</small>	<small>Due Within Mont</small>

Outreach Tasks

431	12	68	114
<small>Overdue</small>	<small>Due Today</small>	<small>Due Within Week</small>	<small>Due Within Mon</small>

Checklist Tasks

524	19	133	422
<small>Overdue</small>	<small>Due Today</small>	<small>Due Within Week</small>	<small>Due Within Mon</small>

Completed Targets and Checklist Tasks Without a Specified Outcome

1,665	6
<small>Checklist Tasks</small>	<small>Targets</small>

Program Dashboard

Referral/Authorization Workqueue GERI ADC GUIDE WW MP2

Refresh Filter Edit Defer Assign Show Mine Notes Edit w/

Active (Total: 251) Deferred (Total: 0)

Priority	Order Name	Order Display Name
Routine	REFERRAL TO UCLA ADC ...	Referral to UCLA ADC Program, Behavioral Health
Urgent	REFERRAL TO UCLA ADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLA ADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLA ADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLA ADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLA ADC ...	Referral to UCLA ADC Program, Behavioral Health

Referral Workqueue

Program Management

- **Interest**

- Dates, methods, eligibility, reason not eligible, scheduled intake

- **Alignment**

- Intake visit, alignment date, assigned tier, assigned G code, respite eligibility, home visit provider, home visit date, follow up CAV due, CCM disenrollment, GUIDE flag in Epic

- **Monthly Touchpoint**

- Date of outreach
- Documentation encounter in EMR

- **EMR Reports**


- Flag in EMR for GUIDE
 - Allows to pull visits
 - Alerts billing
- High Risk Meds
 - Developing report
- Existing hospitalization report

CBO Communication


GUIDE Considerations	EPIC Functions
<ul style="list-style-type: none">• CBO Respite Referral Management• CBO Utilization• Communication between participant and CBO• Documentation	<ul style="list-style-type: none">• HealthLink• Referral Messaging• Respite Tracking Flowsheet

U Home In Basket Patient List **Referral Search** Claims Upcoming Appts - My ... My Reports External Sites Patient Manage My Clinic Menu Log Out Epic


Welcome to UCLA HealthLink




UCLA HealthLink




Select a patient



Open Chart Review



Create a referral




Manage My Clinic

Referral Search

[Edit search criteria](#)

Loaded 1 outgoing referral. [Refresh](#)

Referral ID	Patient Name	Status	Sched Status	Priority	Referred by Provider	Referred by Location	Referred to Provider	Referred to Department	Created	Expires
5008540549	 Pizza, Dominic Tap	Incomplete	Pending Authorization	Routine	Fox, James M., MD		Goh, Carolyn, MD	Westwood Dermatology	03/04/2020	07/02/2020

HealthLink

Referral by Provider > Referral Details > Add Referral Note/Attachment


Enter a referral note below. You must enter at least a **Note summary** or a **Note**. You may attach a file to the referral note by clicking the **Browse** button next to the **Attachment** field.

New Referral Note

Note type: Provider Comments

Note summary: Updated Authorization Information

Note: Contacted health plan and secured additional authorization information that is attached to support this request.

Attachment:  UCLA HealthLink File At...

Referral By Provider > Referral Details > New Referral Message

To:

Priority: High Routine Low

Subject:

Patient: Pizza, Dominic Tap [5567382]

Referral ID	Referred By	Referred To	Status	Start	Expires
5008540549	FOX, JAMES M.	GOH, CAROLYN	INCOMPLETE	03/04/2020	07/02/2020

Note:

Referral Messaging with CBOs

Patient Family Communication

- Documentation encounter
- List of topics to prompt conversation
- Local resource sheet available



Community partners

- OT for home assessment
- Respite "broker"
 - Communicate need and eligibility
 - Invoice to clinic
 - Monthly tracking report

Questions & Answers

Get Connected!

Join the NDCC Mailing List



Complete the Dementia Care Improvement Instrument



Upcoming Webinar - Thursday, February 27th 4pm EST/1pm PST

Getting to Yes for Launch: GUIDE Participants Overcoming Challenges to Using your Electronic Health Record (EHR) to Implement Comprehensive Dementia Care

Presenters:

- Brown Medicine: Thomas Bayer, MD and Aman Nanda, MD, Co-Directors Comprehensive Dementia Care
- My Memory Clinic: Christi Rushnell, Chief Operating Officer

Thank you for attending!