EDC.ORG

NDCC National Dementia Care Collaborative

The John A. Hartford Foundation

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

ADC Alzheimer's and Dementia Care PROGRAM

UCLA Health

imc Integrated Memory Care

Where Dementia is Primary

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

ADC Alzheimer's and Dementia Care PROGRAM

UCLA Health

imc Integrated Memory Care
Where Dementia is Primary

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
• Eligibility • Scheduling/Enrollment • Pre-Visit Preparation	• Referral Workqueue • Compass Rose Management • EPIC Healthy Planet • Electronic Questionnaires

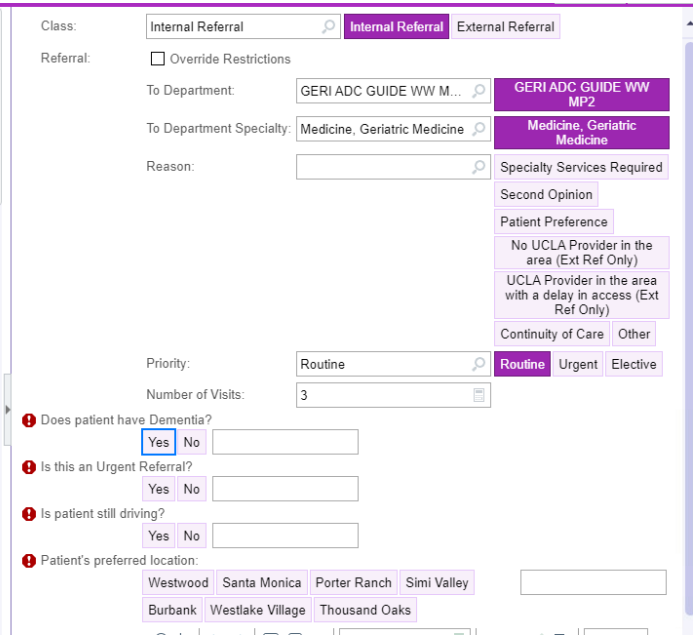
Pre-Visit

GUIDE Considerations	EPIC Functions
Eligibility	• Referral/Referral Workqueue • Compass Rose Management *Case Team, Outreach Management, Patient Status* • Healthy Planet *Episode of Care Smartform*

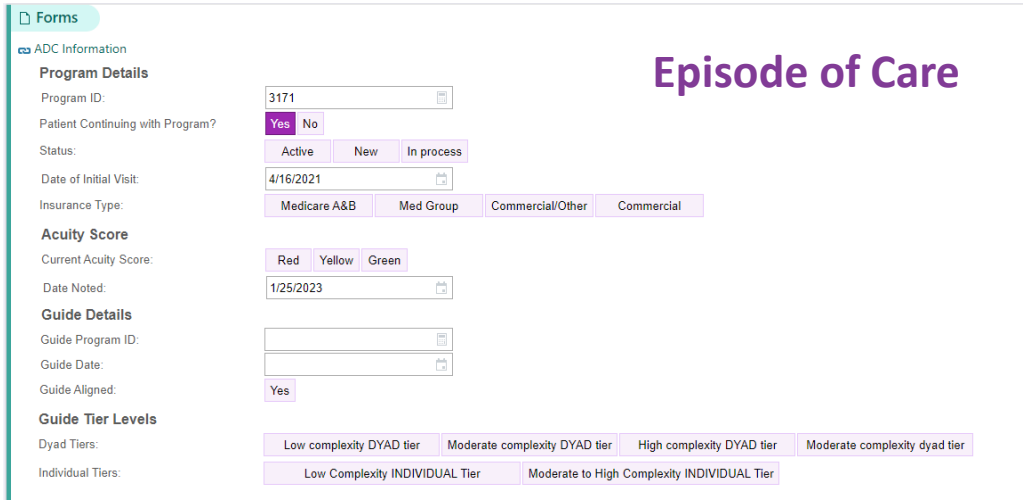
PLEASE NOTE:
Referrals placed as urgent will undergo a review by one of our Dementia Care Specialists to review urgency for priority scheduling. Urgent referral criteria includes:

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

ADC Referral

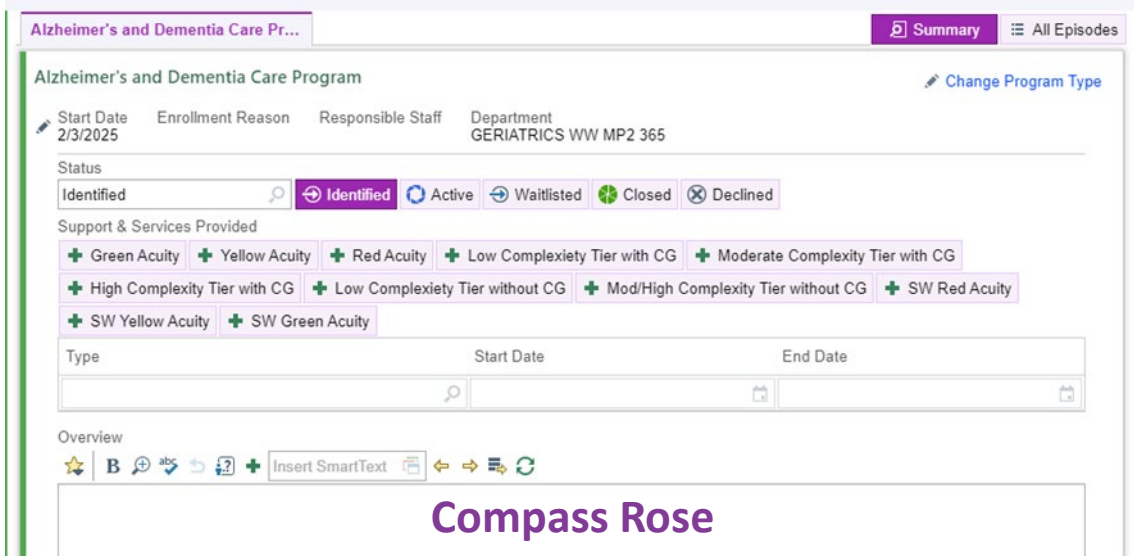


Episode of Care

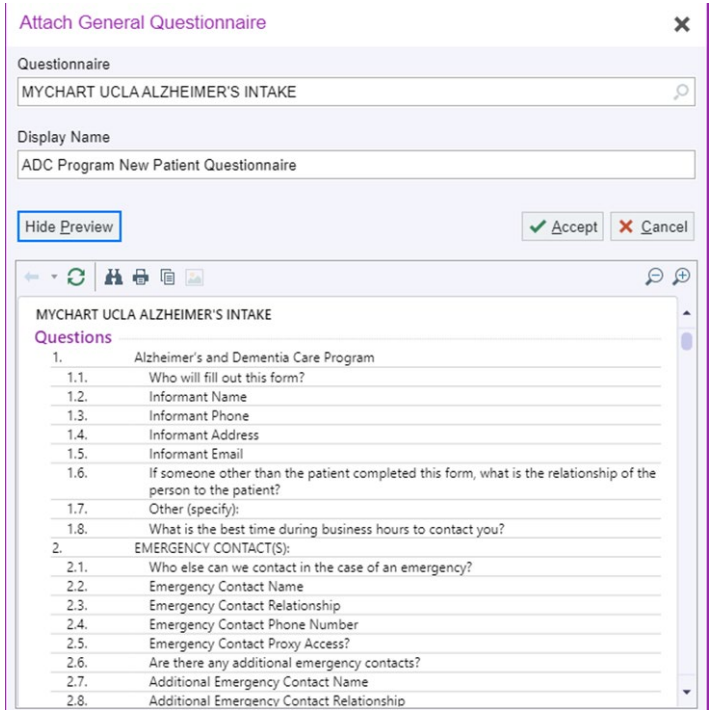


Pre-Visit

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*



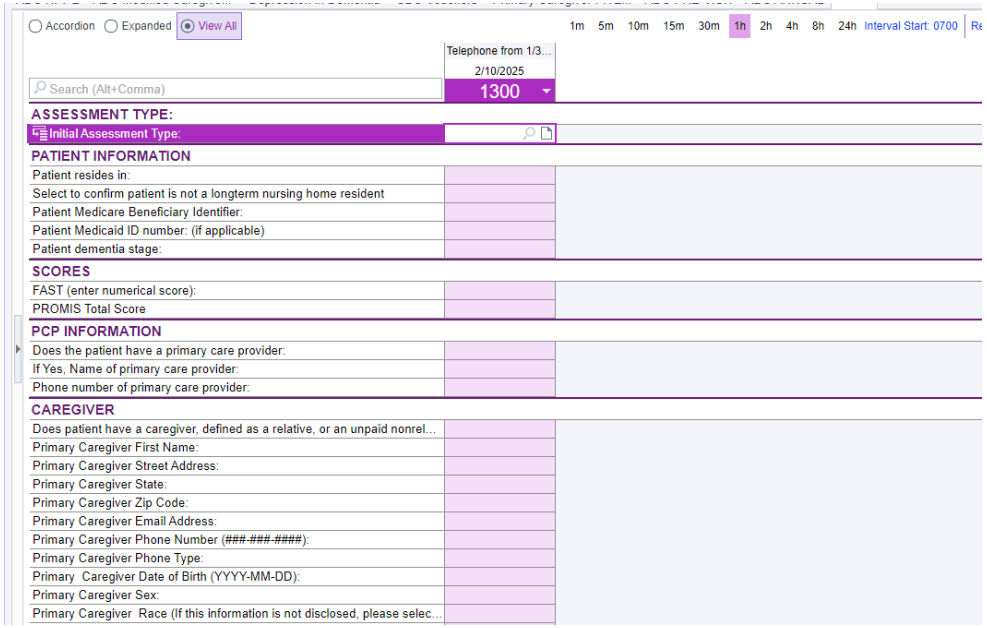
Compass Rose



E-PVQ

Pre-Visit

GUIDE Considerations	EPIC Functions
Pre-Visit Preparation Patient information, tool collection, caregiver demographics	• Electronic Pre-Visit Questionnaire (e-PVQ) *E-PVQ mapped to flowsheets* *Flowsheet then mapped to smartphrase*



E-PVQ Flowsheet

Pre-visit

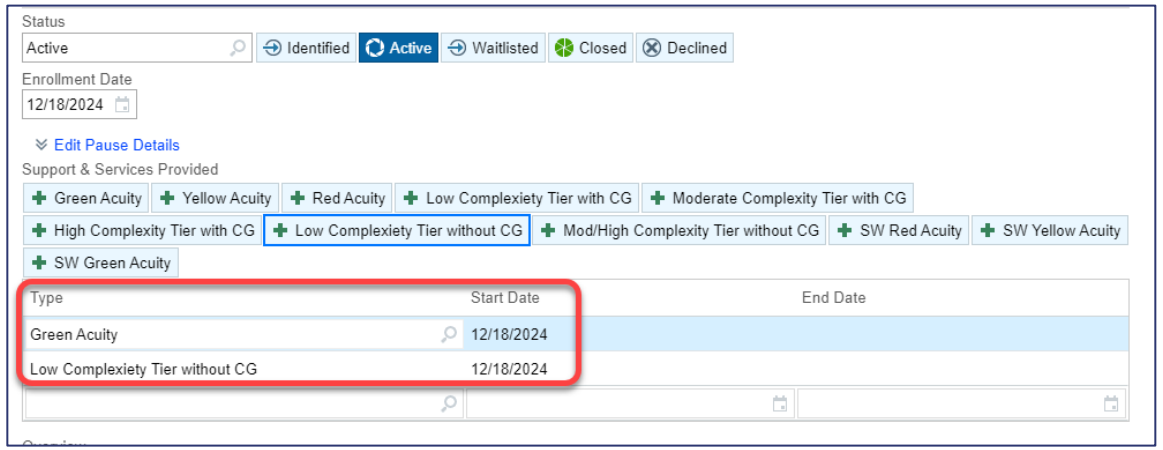
- **Recruitment**
  - Sending EMR messages to existing patient panels
    - Lots of phone/messages
    - Developing FAQ document
- **Eligibility screening**
- **Visit Questionnaires**
  - Fillable PDF
  - Sent ahead of appt
  - Portal, email, fax for return
  - Packets for in person visits

Clinic Visits/Virtual Visits Overview

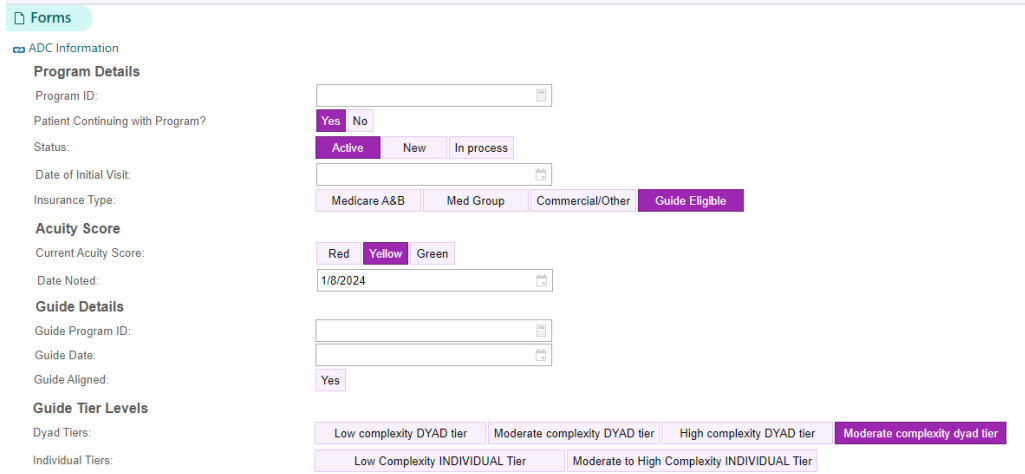
GUIDE Considerations	EPIC Functions
• Video Visit • Collection of Information for GUIDE requirements • Post-visit education for caregiver	• MyChart video • Flowsheets • Referrals • After Visit Summary • Healthy Planet

Clinic/Virtual Visits

GUIDE Considerations	EPIC Functions
• Video Visit • Collection of Information for GUIDE requirements *Cognitive screening, caregiver demographics, PROMIS 10 and Zarit, HRSN, FAST, etc.*	• MyChart video *Virtual visit encounter* • Flowsheets *Flowsheets will map to smartphrase* • Smartphrases • Compass Rose *Updating complexity tier on program support and services* • Healthy Planet *Updating episode of care to indicate complexity tier*



Updated Compass Rose Support and Services



Updated Episode of Care

Linked Smartphrase

Clinical visit

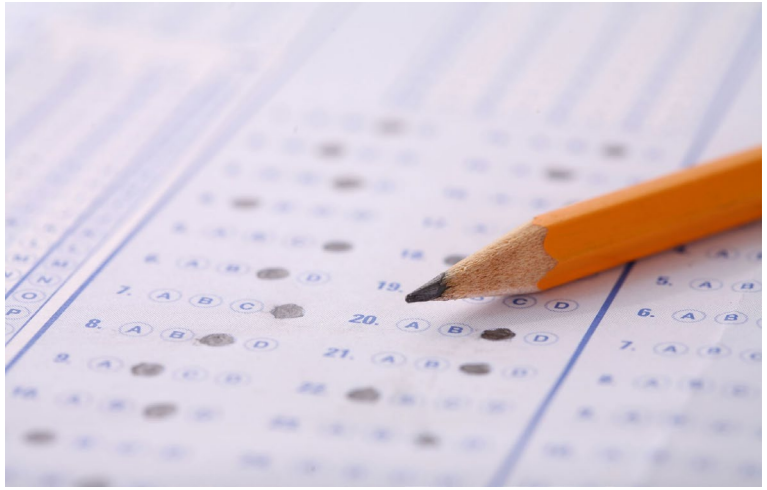
- **Unique visit types in Epic**
  - GUIDE Intake
  - GUIDE Follow-Up
  - GUIDE Home Assessment

- **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
• Collection of GUIDE submissions requirements	• Smartforms map to flowsheets *Flowsheets map to a report for weekly GUIDE submission*

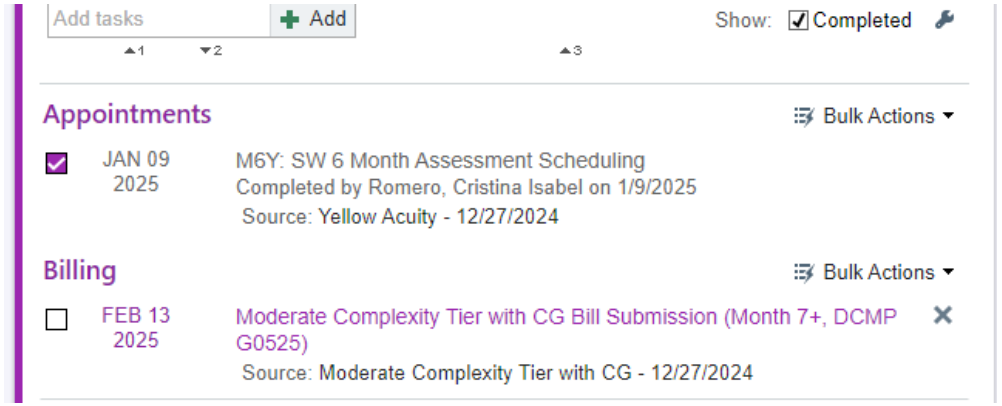
Care Coordination Overview

GUIDE Considerations	EPIC Functions
• Ongoing panel management • Identify enrolled status of the patient • Optimize dementia management quality measures maker • Billing Tracking	• Compass Rose Care Management • Care Coordination Note • Advance Care Planning Module • Best Practice Alert (BPA) • Care Everywhere

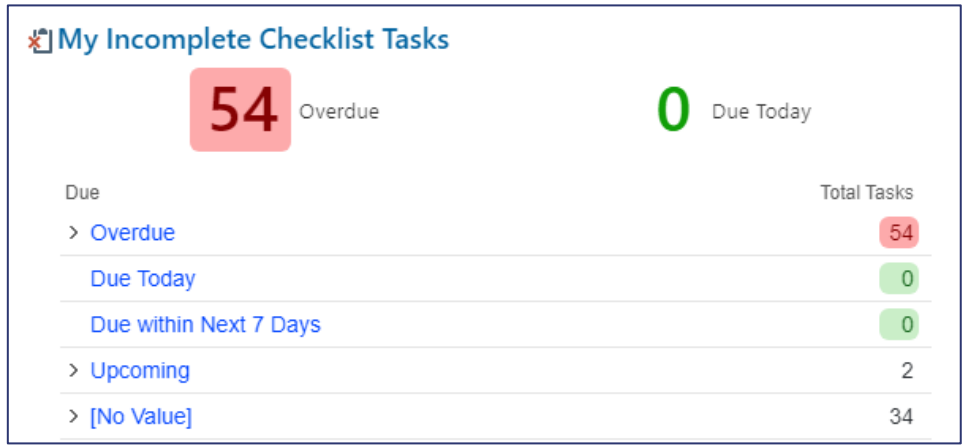
Care Coordination

GUIDE Considerations	EPIC Features:

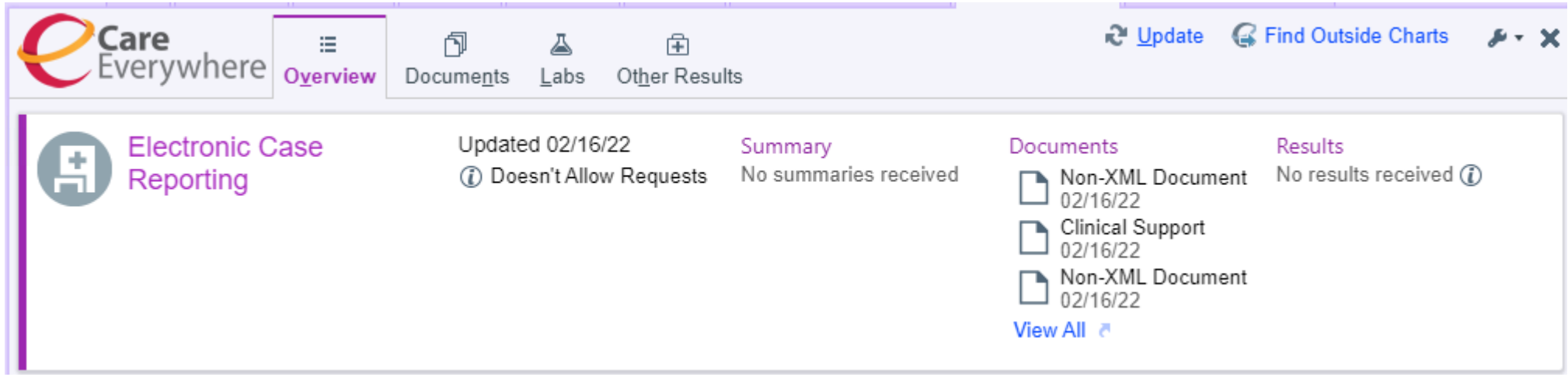
• Ongoing panel management
• Identify enrolled status of the patient
• Billing Tracking
	• Care Coordination Note
	• Care Everywhere
	• Compass Rose Care Management
	  • Support and services build out
	  • Complexity tier populates checklist assigned to designated staff member
	  • Billing tier populates a billing checklist for responsible staff
	  • Individual user checklist dashboard



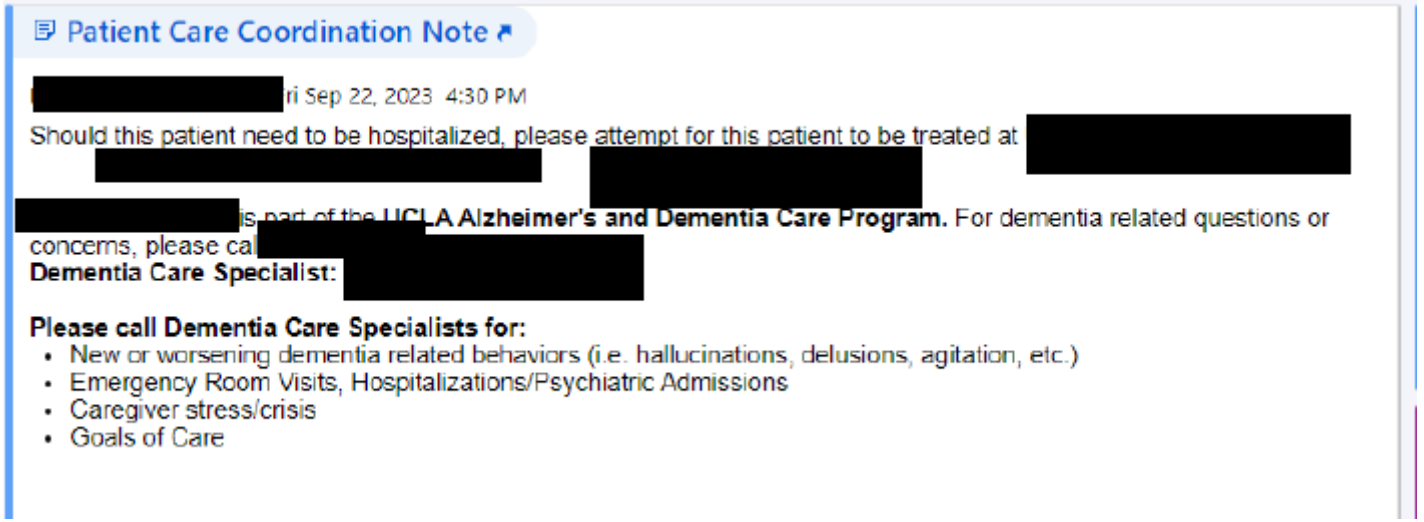
Individual Checklists (Complexity Tier and Billing Checklist)



Individual User Checklist



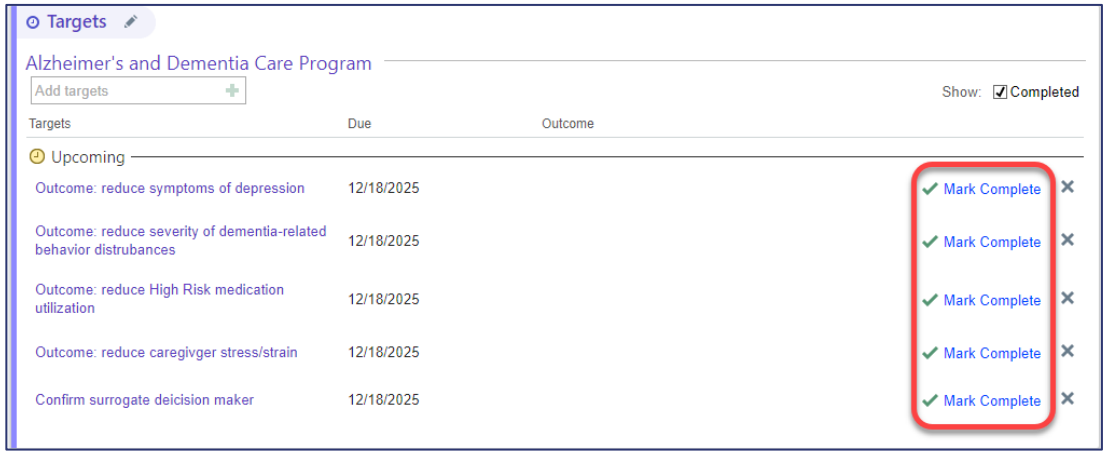
Care Everywhere



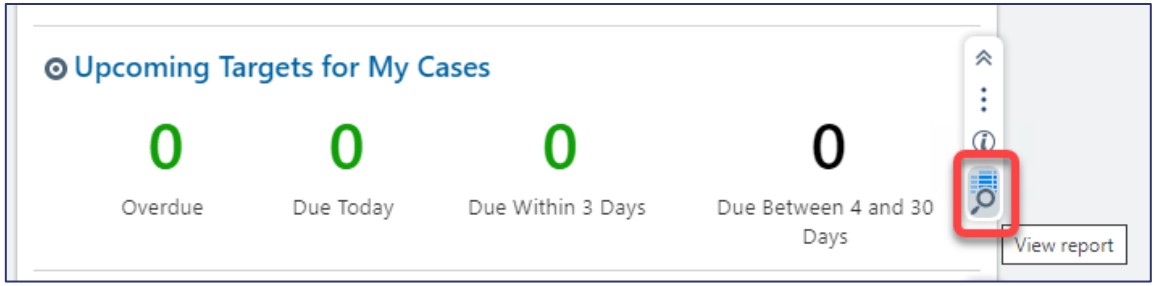
Patient Care Coordination Note

Care Coordination

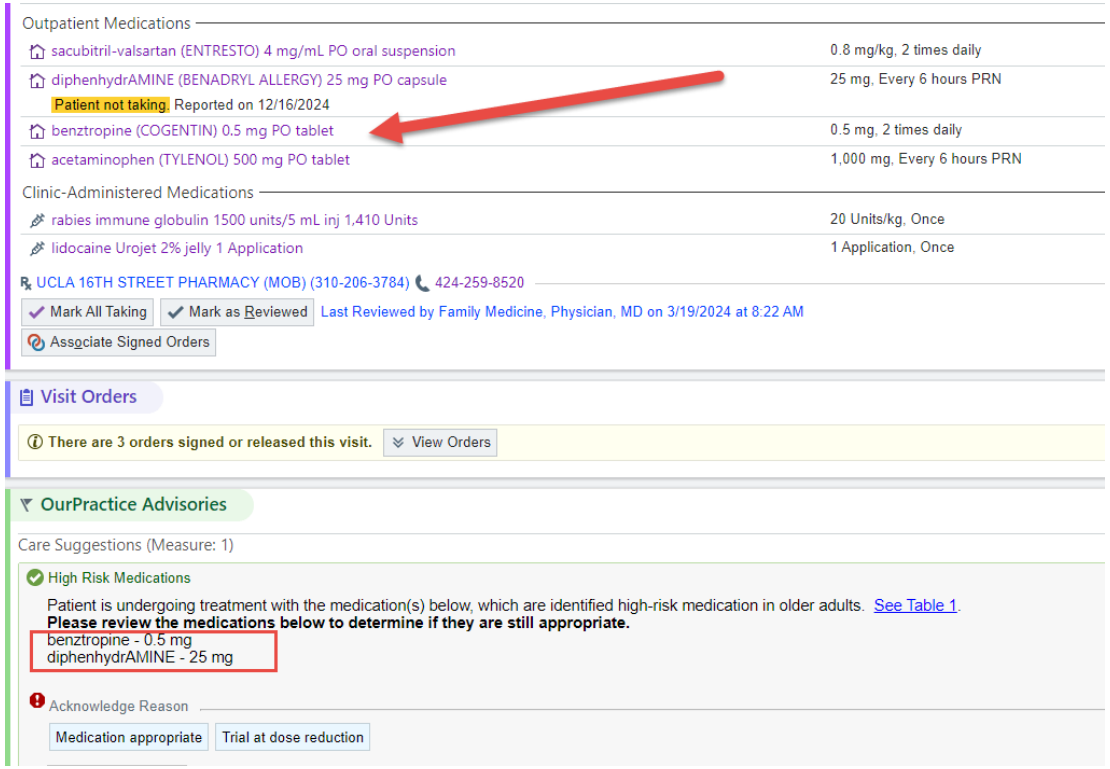
GUIDE Considerations	EPIC Features:
• Optimize dementia management quality measures • Use of high-risk medications, reduce severity of dementia related behaviors, reduce caregiver stress and strain, and confirm surrogate decision maker	• Targets • Individual user dashboard- Target Report • Advance Care Planning Module • Best Practice Alert (BPA)



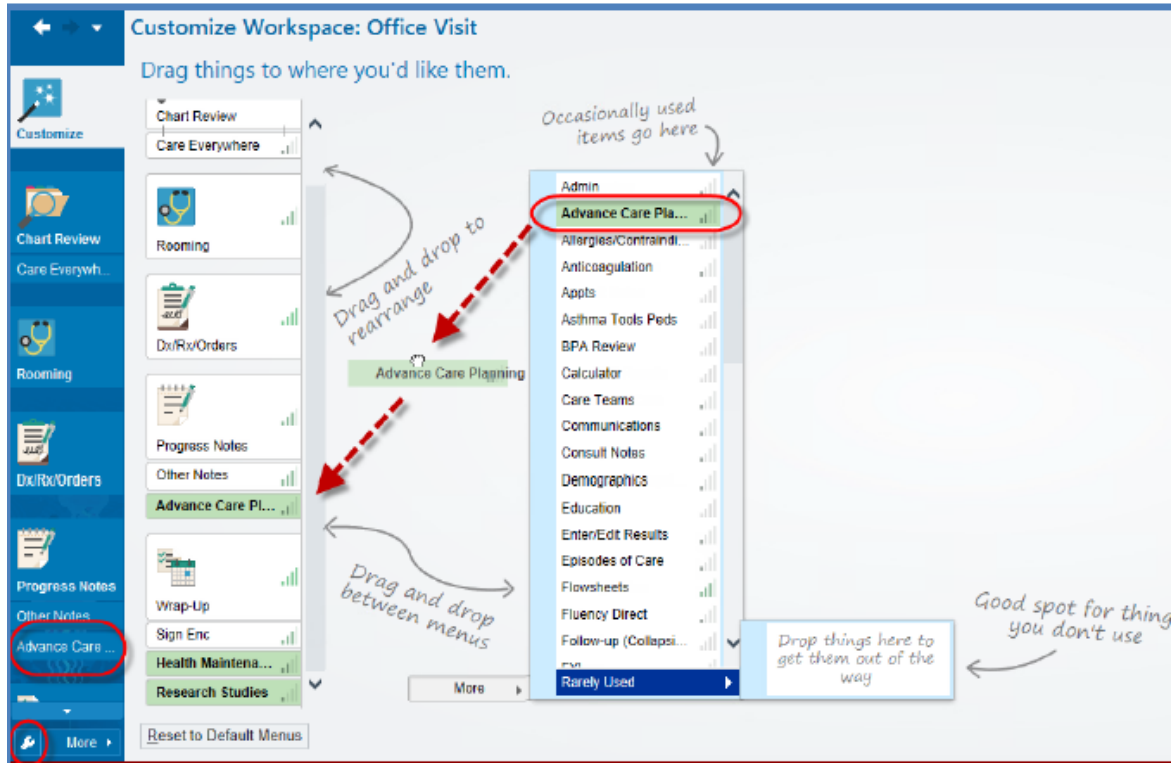
Targets



Targets on dashboard



BPA Alert



Advance Care Planning

Care Coordination

- No differences in care coordination for GUIDE vs others

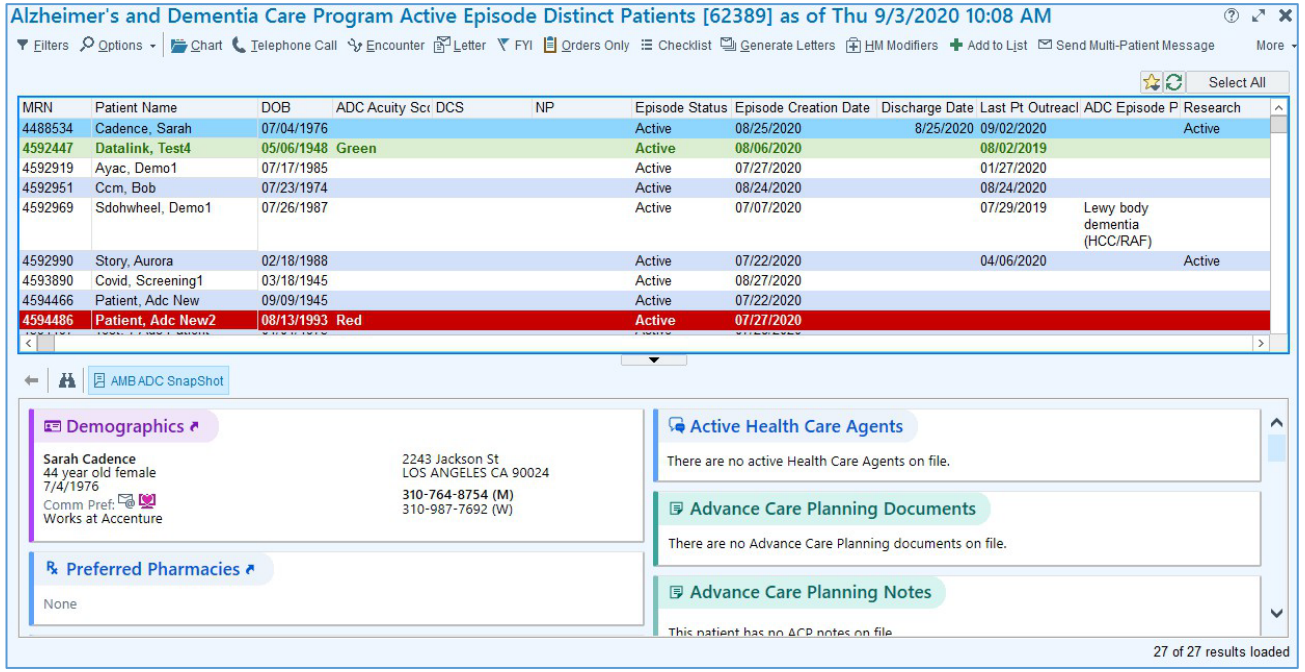
- OT contracted for home visit
  - Developed home safety and function checklist
  - Refer through a portal, get checklist and comments back through portal

Program Management

GUIDE Considerations	EPIC Functions
• Reporting • Program Performance Measures • Program Billing Tracking	• Episode of Care Smartform Reporting • Compass Rose Program Dashboard • Referral Workqueue

Program Management

GUIDE Considerations	EPIC Functions
• Patient Reporting	• Episode of Care Reporting *Enrolled patients by provider* *Program status* *GUIDE complexity tier*

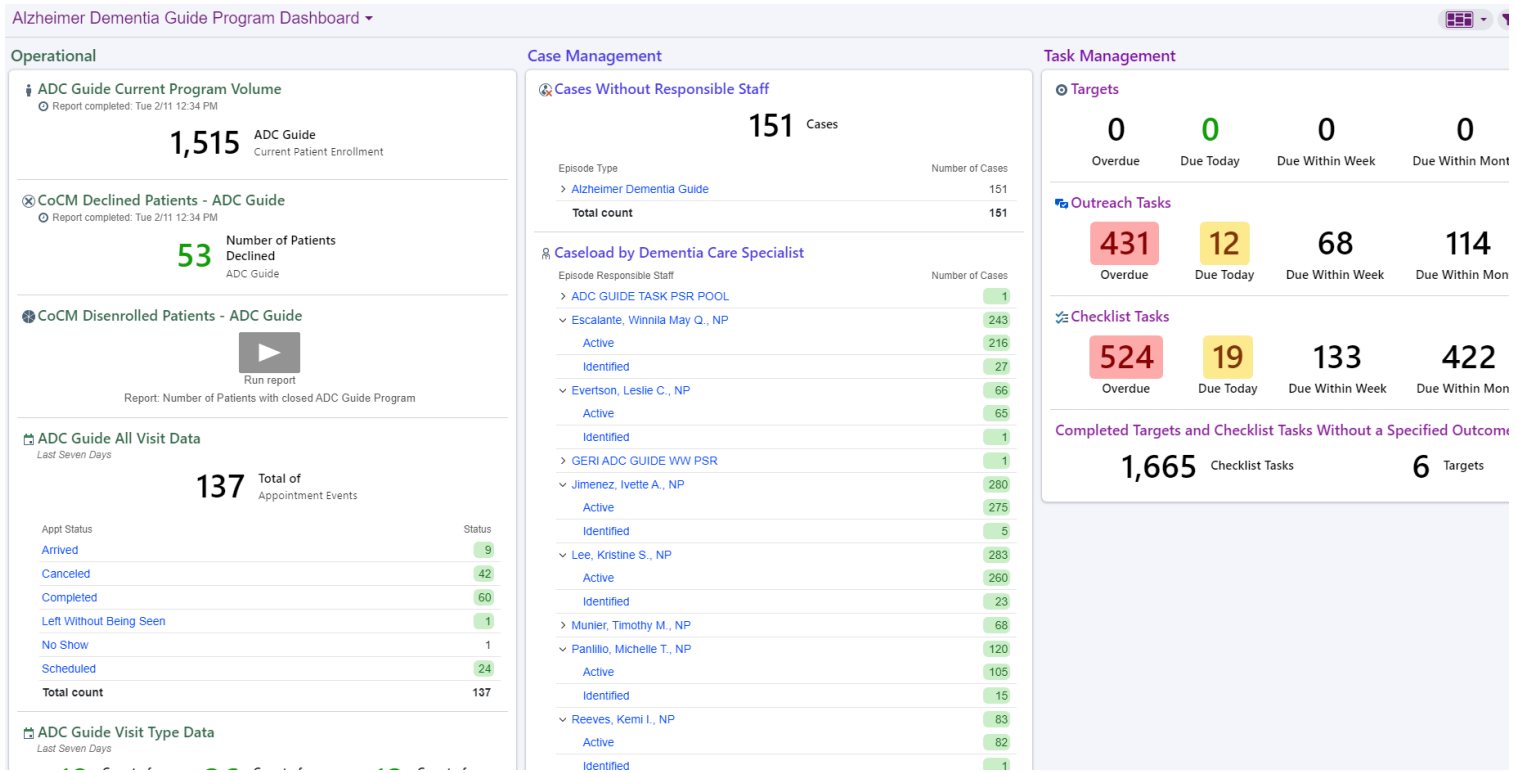


Episode of Care Reporting

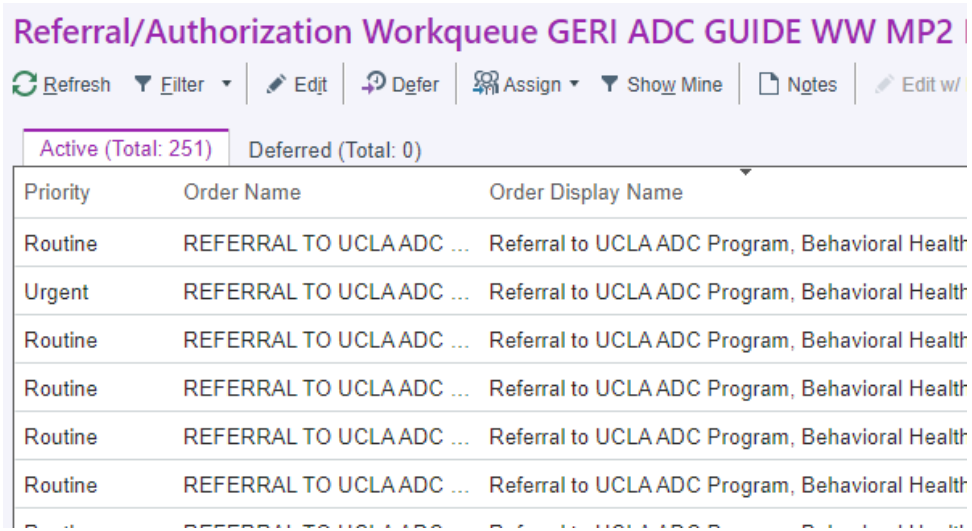
Program Management

GUIDE Considerations	EPIC Functions

• Program Performance Measures
• Program Billing Tracking
	• Compass Rose
	  • Program Dashboard
	  Target tracking
	  Program performance tracking
	  • Support and Service breakdown
	• Referral Workqueue
	  SW Referrals



Program Dashboard



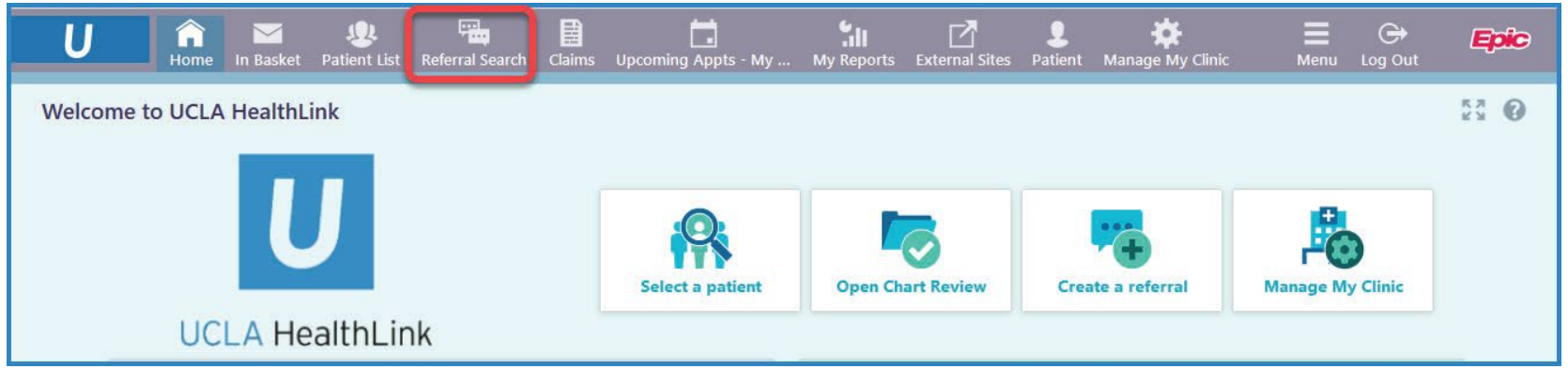
Referral Workqueue

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
• CBO Respite Referral Management • CBO Utilization • Communication between participant and CBO • Documentation	• HealthLink • Referral Messaging • Respite Tracking Flowsheet


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
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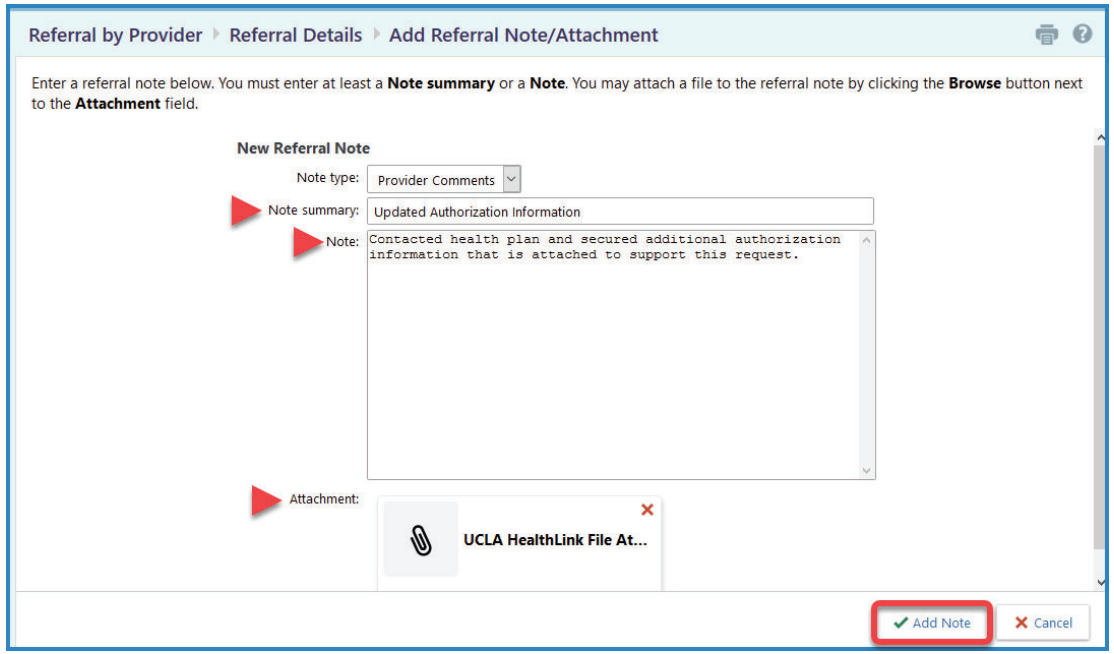
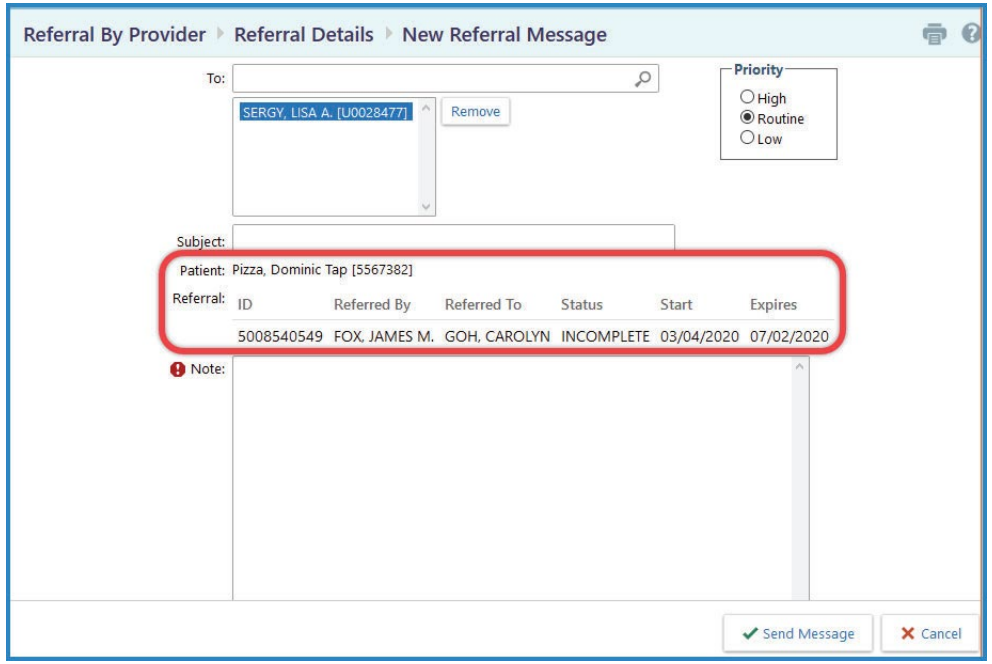
Pending Authorization
Routine
Fox, James M., MD
Goh, Carolyn, MD
Westwood Dermatology
03/04/2020
07/02/2020

HealthLink





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!