

ELECTRONIC HEALTH RECORD WORKFLOWS

Practical approaches for GUIDE and
comprehensive dementia care providers

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Kemi Reeves, DNP, MBA **Associate Director**

- Gerontological Nurse Practitioner
- Associate Director of the UCLA Alzheimer's and Dementia Care Program
- Inaugural Director of Nursing Health Care Equity for the UCLA Health System
- Dementia Care Specialist
- Assistant Clinical Professor at the UCLA School of Nursing



Andrea Centeno, MS **Program Manager**

- Program Manager
- MS, Health Policy and Management



A Case Study on Leveraging an Electronic Medical Record for Comprehensive Dementia Care Management

Kemi Reeves, DNP, MBA, GNP-BC

Associate Director, UCLA Alzheimer's and Dementia Care Program

Andrea Centeno, M.S.

Program Manager, UCLA Alzheimer's and Dementia Care Program



Learning Objectives



- Explore Epic modules and tools used to operationalize a comprehensive dementia care programs.
- Examine how Compass Rose functions enable program oversight, care coordination, and quality monitoring.

Disclaimer

This presentation is a case study describing how the UCLA Alzheimer's and Dementia Care Program utilized its electronic medical record (Epic) to operationalize a comprehensive dementia care program. The UCLA Alzheimer's and Dementia Care Program is not affiliated with Epic Systems Corporation and does not represent, endorse, or serve as an expert authority on Epic products or services.

Epic Modules and Tools Inventory

EPIC Tool	Primary Purpose	Key Users
Episode of Care	Longitudinal care framework	Care teams & program leadership
SmartForms	Structured documentation tool	Care teams, patients, caregivers
MyChart	Patient-facing portal	Care teams, patients, caregivers
Best Practice Advisory	Clinician decision support	Care teams & program leadership
Healthy Planet	Population health & registries	Program leadership
Compass Rose	Care coordination workspace	Care teams & program leadership
Care Everywhere	External record exchange	EPIC clinicians
Referrals (ADC specific)	Internal and external referral tracking and send out	Care teams, community partners, & program leadership
HealthLink	External partner chart access and communication	Community partners
Flowsheets	Internal tracking and reporting	Care teams & program leadership

Epic Tool: Episode of Care

Organizes all care activities related to a condition or goal into a single longitudinal framework.

Dementia Care Use Case

EOC is incredibly because it creates a longitudinal “home” for dementia care, linking all dementia–related visits, clarifies accountability for dementia related care, and enables reporting and program evaluation.



Links multiple encounters (inpatient, outpatient, ED, telehealth)



Organizes orders, referrals, and documentation



Provides shared clinical context for care teams



Supports care coordination and continuity



Enable tracking and reporting across the full care course

Epic Tool: Episode of Care

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 Commercial

Acuity Score

Current Acuity Score: Red Yellow Green

Date Noted:

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

Episode of Care Form

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 Outreach	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				

AMB ADC 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

Epic Tool: SmartForms

A SmartForm within Epic is a highly customizable, structured data-capture tool used to streamline clinical workflows by integrating documentation, data review, and decision support into a single interactive interface.

Dementia Care Use Case

Pre-Visit Preparation

- Patient information
- Tool collection (Zarit, PHQ-9, NPI-Q, HRSN, etc.)
- Caregiver demographics

The screenshot displays an Epic SmartForm interface for a dementia care use case. At the top, there are navigation options: 'Accordion', 'Expanded', and 'View All'. A search bar is present with the text 'Search (Alt+Comma)'. To the right, there are time interval options: '1m', '5m', '10m', '15m', '30m', '1h', '2h', '4h', '8h', '24h', and 'Interval Start: 0700'. A dropdown menu shows 'Telephone from 1/3...' with the value '2/10/2025' and '1300'. Below the search bar, the form is organized into several sections:

- ASSESSMENT TYPE:** Includes a field for 'Initial Assessment Type'.
- PATIENT INFORMATION:** 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:'.
- SCORES:** Includes fields for 'FAST (enter numerical score):' and 'PROMIS Total Score'.
- PCP INFORMATION:** Includes fields for 'Does the patient have a primary care provider:', 'If Yes, Name of primary care provider:', and 'Phone number of primary care provider:'.
- CAREGIVER:** Includes fields for '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...)'.

Epic Tool: MyChart

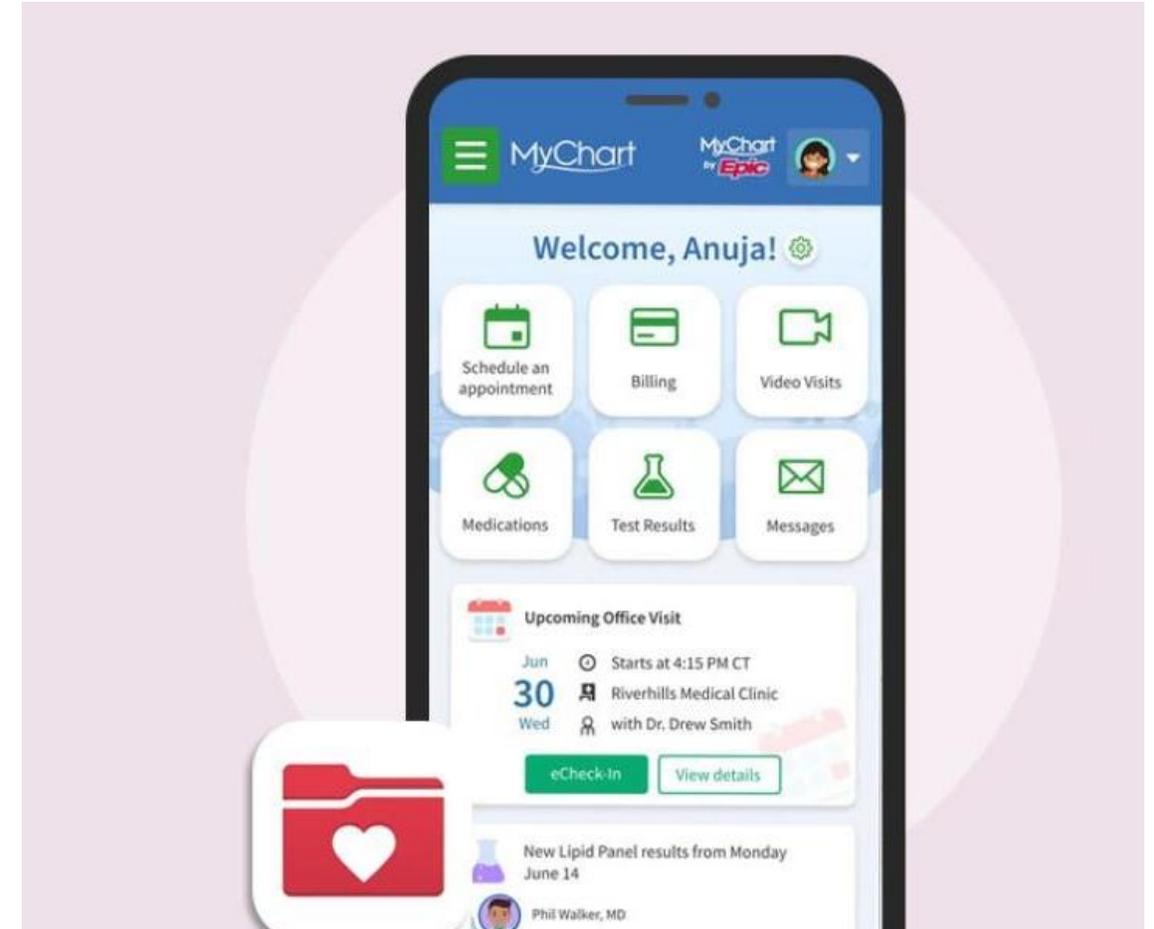
MyChart is Epic's secure patient-facing portal, allowing patients and caregivers to digitally communicate with the health system outside of visits.

Dementia Care Use Case

In dementia care, MyChart enables:

- Ongoing caregiver engagement between visits
- Early identification of behavioral or safety issues
- Manage appointments and join video visits
- Efficient coordination without unnecessary ED visits
- Clear documentation of caregiver-reported concerns

It effectively extends the care team into the home.



Epic Tool: Best Practice Advisory

An Epic Best Practice Advisory is a real-time clinical decision support tool within Epic that triggers real-time alerts, reminders, or warnings to clinicians based on specific patient data.

Designed to enhance:

- Patient safety
- Standardize care
- Improve patient outcomes.

Dementia Care Use Case

Clinician Decision Support:

- High-Risk Medication Review
 - Medication appropriate
 - Gradual dose reduction
- Quality of Life (PROMIS-10)
 - Intervention during encounter
 - Referral to ADC-LCSW
 - Re-assessment

Epic Tool: Best Practice Advisories

Patient Quality of Life (PROMIS-10)

OurPractice Advisories

Care Suggestions (Measure: 1)

Quality of Life

Patient has a PROMIS-Global **Physical** health score less than or equal to 12/20, indicating moderate to severe physical health-related quality of life.

Patient has a PROMIS-Global **Mental** health score less than or equal to 12/20, indicating moderate to severe mental health-related quality of life.

Promis-10
No data found in the last 50 encounters.

Perform the following actions

- Order: 🏠 Referral to UCLA ADC Program, Behavioral Health
- Document: 📄 Promis-10 Reassessment [Edit Details](#)

Acknowledge and continue

Promis-10 addressed during visit Promis-10 not addressed

Accept

High-Risk Medications

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	
🏠 benzotropine (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.

benzotropine - 0.5 mg
diphenhydrAMINE - 25 mg

Acknowledge Reason

Medication appropriate Trial at dose reduction

Epic Tool: Healthy Planet

Epic Healthy Planet is a population health and care management module. Its primary purpose is to help health systems proactively manage groups of patients, especially those with chronic, complex, high- risk conditions.

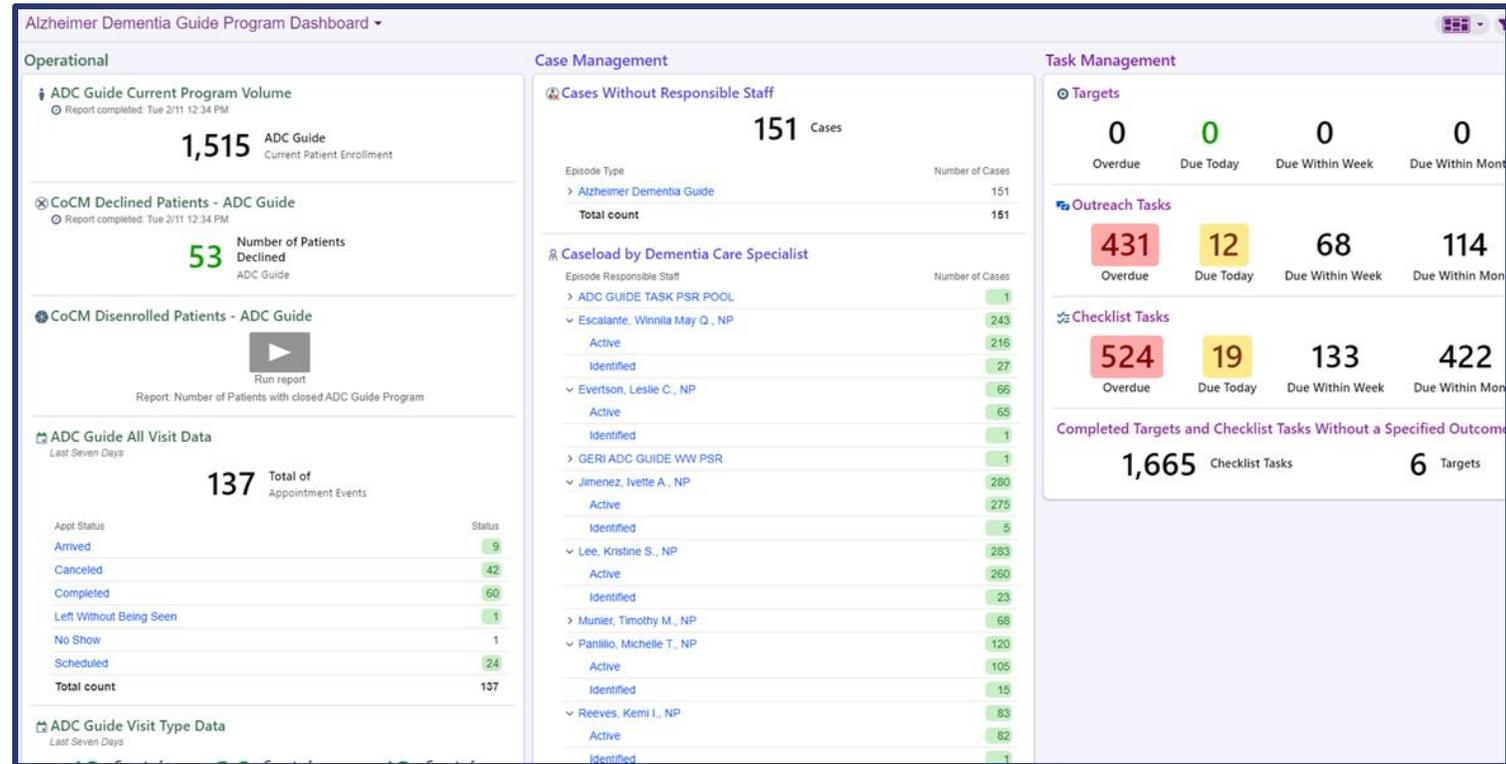
Manages populations, not just visits:

- Define patient registries (e.g. patients with dementia, high ED use, high HRSN)
- Track patients longitudinally across care settings
- Identify gaps in care before they become crisis

Epic Tool: Healthy Planet

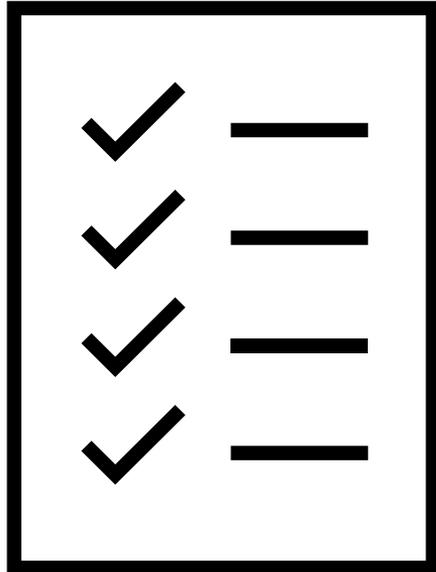
Dementia Care Use Case

- Maintain a registry of enrolled dementia program patients
- Identify patients with:
 - High caregiver strain
 - Behavioral symptoms
 - Frequent hospital or ED use
- Support proactive outreach after:
 - ED visits
 - Hospital discharges
 - Safety events
- Track program outcomes and equity metrics



Program Dashboard

Epic Tool: Compass Rose



Epic Healthy Planet is a task-driven program to organize patients, manage care, and track outcomes this is focused on, Social Determinants of Health, Care Coordination, High-risk patient management

Provides a comprehensive view of patient risk and outreach organized as program:

- Targets
- Checklist Tasks

Epic Tool: Compass Rose Targets

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 are associated with program encounters and track information about the progress of a patient's care, often related to regulatory requirements



Targets should track the most important milestones, or time-sensitive requirements, for your organization's programs.

Epic Tool: Compass Rose Checklists

Epic Compass Rose, Checklist Tasks are structured, trackable action items used to ensure standardized, consistent completion of care management activities for patients enrolled in a program.

Checklist tasks break complex care into clear, actionable steps

- Ensure core program requirements are completed
- Support role-based workflows (NP, RN, LCSW, care coordinator)
- Track status (not started, in progress, completed)
- Create accountability and visibility across the care team
- Support auditing and quality monitoring

How Checklist Tasks Work in Compass Rose

1. A patient is enrolled in a Compass Rose Program or Episode of Care
2. A checklist is automatically generated or manually applied using the Support & Services procedure
3. Tasks are assigned to specific roles or users
4. Tasks appear in the Compass Rose activity queue
5. Completion updates the checklist and program status

The screenshot displays the 'Alzheimer's and Dementia Care Program' interface. At the top, there is a tab labeled 'Alzheimer's and Dementia Care Pr...' and a 'Summary' button. Below this, the program name 'Alzheimer's and Dementia Care Program' is shown with a 'Change Program Type' link. The main section contains fields for 'Start Date' (2/3/2025), 'Enrollment Reason', 'Responsible Staff', and 'Department' (GERIATRICS WW MP2 365). A 'Status' dropdown menu is set to 'Identified', with other options being 'Active', 'Waitlisted', 'Closed', and 'Declined'. Below the status, a 'Support & Services Provided' section lists various acuity and complexity tiers, each with a plus sign icon: 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, and SW Green Acuity. At the bottom, there is a table with columns for 'Type', 'Start Date', and 'End Date', each with a search icon.

Epic Tool: Compass Rose Checklists

Patient Level Checklist

Add tasks Show: Completed

▲1 ▼2 ▲3

Appointments Bulk Actions ▼

JAN 09 2025 M6Y: SW 6 Month Assessment Scheduling
Completed by Romero, Cristina Isabel on 1/9/2025
Source: Yellow Acuity - 12/27/2024

Billing Bulk Actions ▼

FEB 13 2025 Moderate Complexity Tier with CG Bill Submission (Month 7+, DCMP G0525) ✕
Source: Moderate Complexity Tier with CG - 12/27/2024

Panel Level Checklist

My Incomplete Checklist Tasks

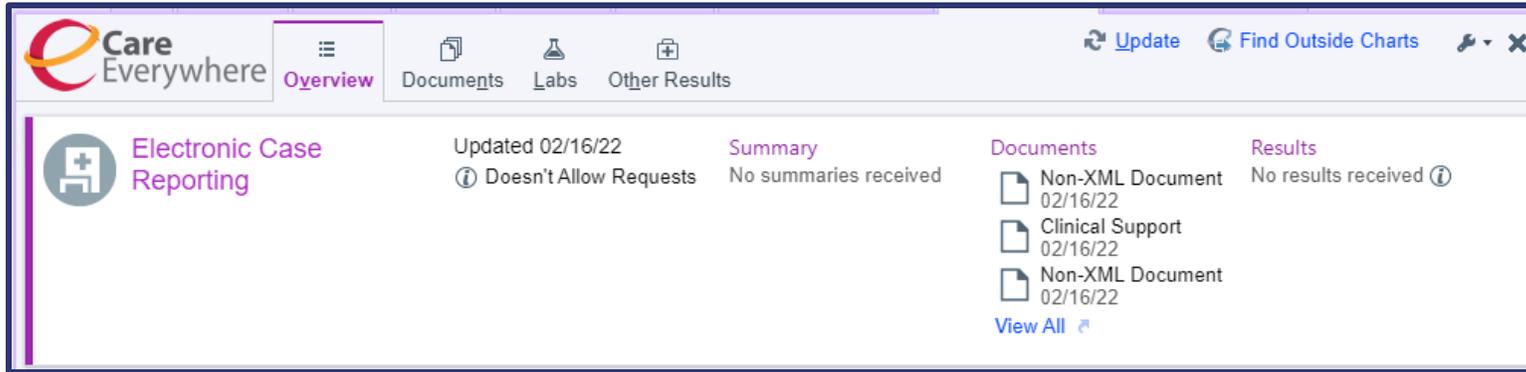
54 Overdue **0** Due Today

Due	Total Tasks
> Overdue	54
Due Today	0
Due within Next 7 Days	0
> Upcoming	2

Why is Compass Rose a valuable tool for comprehensive dementia care?

Standardize	Standardize care across disease stages
Ensure	Ensure caregiver needs are addressed—not just patient needs
Reduce	Reduce missed safety and ACP conversations
Support	Support proactive follow-up rather than crisis response
Align	Align daily work with program requirements and quality metrics

Epic Tool: Care Everywhere



Care Everywhere is Epic's health information exchange function. Its primary purpose is to securely share patient health information across different health systems so clinicians have a more complete picture of a patient's care, no matter where that care occurred.

Dementia Care Use Case

- Shares records across organizations
- Improves clinical decision-making
 - Avoid duplicate testing
 - Understand activities of recent hospitalization or ED visits
- Supports transition of care

Epic Tool: Referrals (ADC Specific)

Dementia Care Use Case

- Internal referrals for ADC services
- External referrals that go directly to partnered vendors to initiate services
- ADC designated workqueue to house referrals
- Assists with internal tracking and monitoring

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 UCLAADC ...	Referral to UCLA ADC Program, Behavioral Health
Urgent	REFERRAL TO UCLAADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLAADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLAADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLAADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLAADC ...	Referral to UCLA ADC Program, Behavioral Health
Routine	REFERRAL TO UCLAADC ...	Referral to UCLA ADC Program, Behavioral Health

Designated workqueue

Epic Tool: Referrals (ADC Specific)

Referral to UCLA ADC Program, Behavioral Health

! Patient/family informed of referral:

! Patient/family given Social Work contact information:

Referral Request:

Assistance with social/community resources Brief individual/family Counseling CBO Education (ADC Only)

ER/Hospital Follow-up GUIDE Respite Utilization MediCal/IHSS Optimization Psychoeducation

Psychosocial Assessment Safety Evaluation (i.e. APS, domestic violence, etc) Transportation

Other (please specify):

ADC Program Guide Home Visit Referral

The ADC Home Visit referral is submitted for patients that fall into the Moderate-High Complexity Tier Level. Home visits must be within the ADC Program zip code range.

Referral to Community Dementia Care Services

Is this patient part of the UCLA Alzheimer's and Dementia Care Program?

Request Type

Note: GUIDE ADULT DAY RESPITE will be noted as 1 session date (up to 8 hours per day of service). GUIDE Respite is available for 25-day sessions.

Note: GUIDE IN-HOME RESPITE will be in 4 hour incremented sessions. GUIDE Respite is available for (18), 4-hr sessions within a fiscal year.

Approved allocated GUIDE Respite amount:

Type of Service:

! In-Home Care:

! Caregiver point of contact:

! Caregiver contact number:

Is this patient part of the UCLA Alzheimer's and Dementia Care Program Program?

! GUIDE initial Assessment Date

! Due Date

! Caregiver point of contact

! Caregiver contact number

! Patient resides

Epic Tool: HealthLink

Dementia Care Use Case

- Shares patient records and referrals across secure platforms to contracted community partners
- Centralized space for community partners and team communication and referral tracking

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

Epic Tool: 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 community partners

Epic Tool: Flowsheets

Dementia Care Use Case

- Documents and tracks individual respite utilization to inform workbench reporting
- Centralizes respite tracking in a single location in EMR
- Enables data to be easily pulled for reporting and analysis

In-Home GUIDE Respite	
Referral sent?	Yes
Date Provided:	7/1/2025
Date to be Used by:	6/30/2026
In-Home GUIDE Respite	Always Best Care
Total Respite Allowance:	2811
Invoice Amount:	1184
Remaining Balance:	1627
Notes:	Used: 32 hrs (...)
Adult Day Care GUIDE Respite	
Referral sent?	<input type="text"/>
Date Provided:	
Date to be Used by:	
Adult Day Care GUIDE Respite	
Total Respite Allowance	
Invoice Amount:	
Remaining Balance:	
Notes:	

Individual respite flowsheet

Guide Aligned	Ins Type	Dyad Tiers	DCS	In-Home Care	In-Home Used By	In-Home Notes	Adult Day Care	In Home Balance Amt	A
Yes	Medicare A&B	Moderate complexity DYAD tier	Lee, Kristine S.	Always Best Care	6/30/2026	Used: 32 hrs (Sept)		1627	

Reporting workbench report

Summary

Epic offers an integrated platform that supports clinical care, psychosocial evaluation, caregiver engagement, and population health management, enabling comprehensive and longitudinal dementia care.

For more information on how to EpicShare team: info@epicshare.org

GUIDE Affinity Group

- Next Session: Wednesday, February 25th at 11am ET/10am CT



Please complete the webinar evaluation



Thank you for attending!