



RAPID

**Reporting Assistance and Process
Improvement Discussion**

**Subject Matter Expert Session 2:
Process Mapping
& UDS Measure Lifecycle**

Vision: Healthy Communities, Healthy People



SUMMER NOT OVER YET, BUT....

WHAT ARE YOU LOOKING FORWARD TO?

Chat in

Starbucks' fall pumpkin spice latte is launching earlier than ever in 2024



Pumpkin cream cold brew
Iced pumpkin cream chai
Apple crisp oatmilk macchiato
Iced apple crisp oatmilk shaken espresso
Raccoon cake pop
Pumpkin cream cheese muffin

Home Depot just released its 2024 Halloween decoration collection, complete with a 7-foot skeleton dog





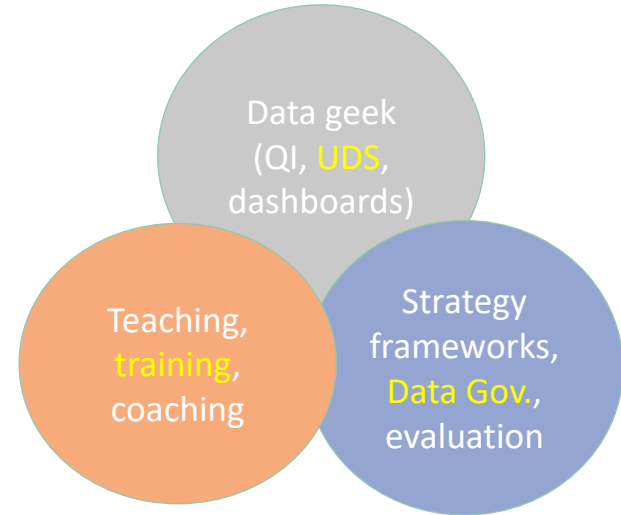
Jerry Lassa, MS
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Experience

- Hospital
- 2 health centers and an HCCN
- State and national trainings
- Adjunct statistics instructor



Areas of focus



Selected content presented today was developed through the Center for Care Innovations “Building a Data Driven Culture” program and in partnership with the HITEQ Center and PCAs and HCCNs across the country.

ROADMAP

Session 1:
Understand Your
Own UDS Reporting
(June)

Session 2:
Understanding Your
Measure of Focus
(July)

Session 3:
Working Towards
Your Goal
(August)

Session 4:
Planning for and
Spreading Success
(September)

SME Session:
Data Governance

SME Session:
Workflow Mapping

How can we use
process maps to “hard
wire” RAPID measure
improvements?

What approaches
and tools help ensure
sustainable change?

OBJECTIVES FOR TODAY'S SESSION



Review approaches and tools that help ensure **sustainable change** with UDS measure improvements.

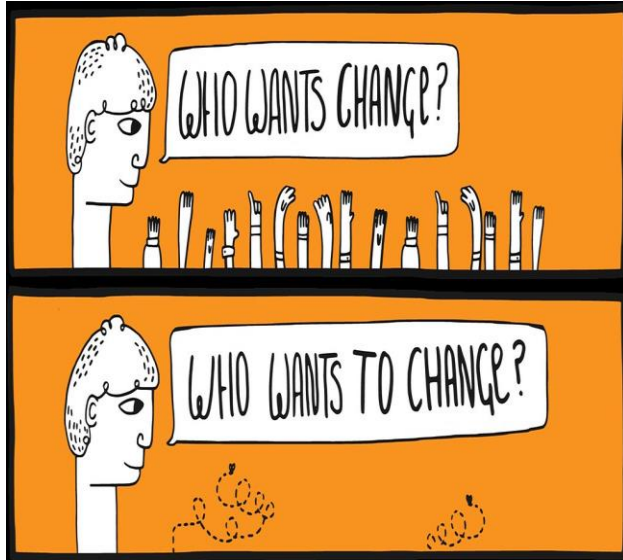


Learn how to use process maps (eCQM and clinic workflows) to assess and improve UDS **measures lifecycle**.



Explore the role of data governance in **monitoring and sustaining** UDS measures lifecycle.

SUSTAINABLE CHANGE - PRINCIPLES



- Leader sponsorship, resource allocation
- Alignment with organization strategy
- Engagement of all stakeholders
- Shared understanding of current state
- Consensus on priority opportunities
- Change informed by internal opportunity and leading external practices to stretch
- Effective change process and systematizing changes to “hard wire” improvement

SUSTAINABLE CHANGE – METHODS & TOOLS

Internal assessment: strengths, weaknesses, opportunities

→ *Your RAPID work to date*

External: Evidence-based practices from the field



Degree of change

— Small, rapid changes → PDSA cycles

— Large, systemic changes → Process redesign, HIT implementation, optimization, or replacement



Define



Measure



Analyze



Improve

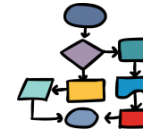


Control

Documents and tools that help **systematize** change

— Policies and procedures, job descriptions, work aids

— *Process and workflow diagrams*

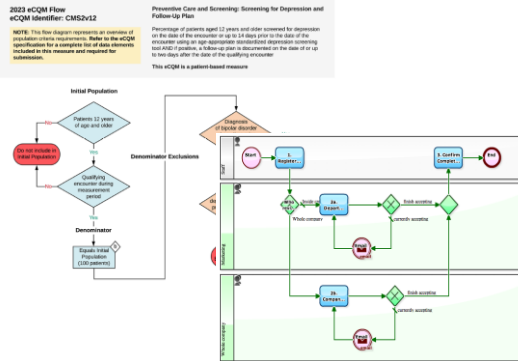


PROCESS-RELATED INFORMATION

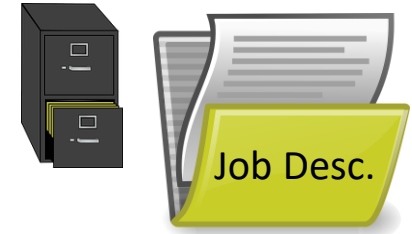
Medical &
Patient Care



Processes &
Workflows



Sites, Depts,
HR

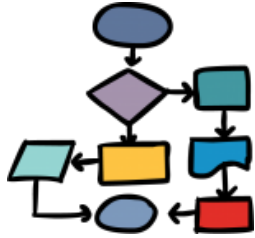


- Evidence-based clinical guidelines
- Standards of care
- Standards of practice

- eCQM flows, specs
- Process Maps
- Workflows

- Job purpose
- Duties and responsibilities
- Qualifications

WHEN TO USE PROCESS MAPS?



- Poor process performance as measured by **clinical**, ops, financial or patient experience measures (quantitative)
- Current process not well understood and/or not being practiced consistently (qualitative)
- When implementing or optimizing a system (e.g., EHR, PHM, patient portal)
- When updating a clinical protocol or care team roles
- Valuable to maintain for all key processes and workflows

WHY USE PROCESS MAPS?

- Effective visual display that provides a “diagnostic” perspective that other tools such as policy and procedure or job description documents may not provide
- Displays chronology of how staff interact with each other, patients, and technology to achieve a goal or complete a task
- Helps to identify:
 - Bottlenecks and other sources of delay
 - Rework due to errors
 - **Role ambiguity**
 - Decision points
 - Duplicated efforts
 - Unnecessary steps
 - Sources of waste
 - **Variation**
 - Hand-offs
 - **EHR/PHM optimization needs**



PROCESS MAP TYPES

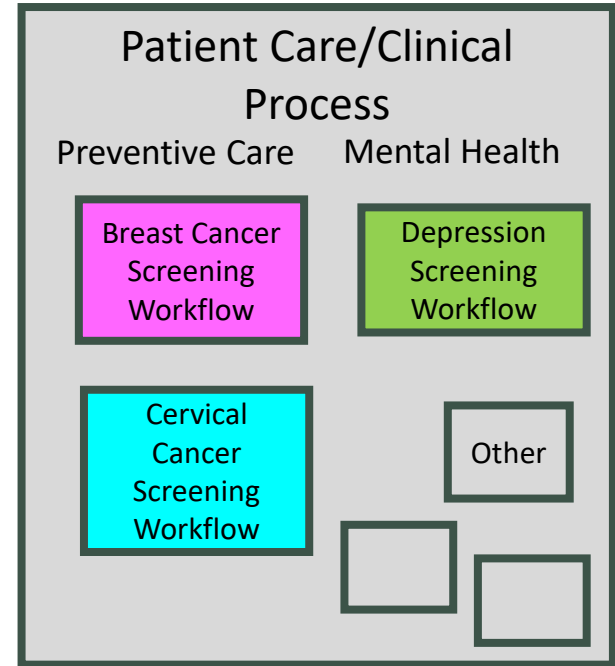
Process flows display all components to achieve a larger organization goal

Ex: Patient care process

- ✓ Collect info about patient
- ✓ Assess to ID problems and priorities
- ✓ Create individual care plan that is evidence-based and cost-effective
- ✓ Implement care plan
- ✓ Monitor patient, follow-up to evaluate effectiveness of the plan and modify as needed

Workflows display activities needed to complete tasks within a process

- ✓ Breast Cancer Screening
- ✓ Cervical Cancer Screening
- ✓ Depression Screening & Follow-up

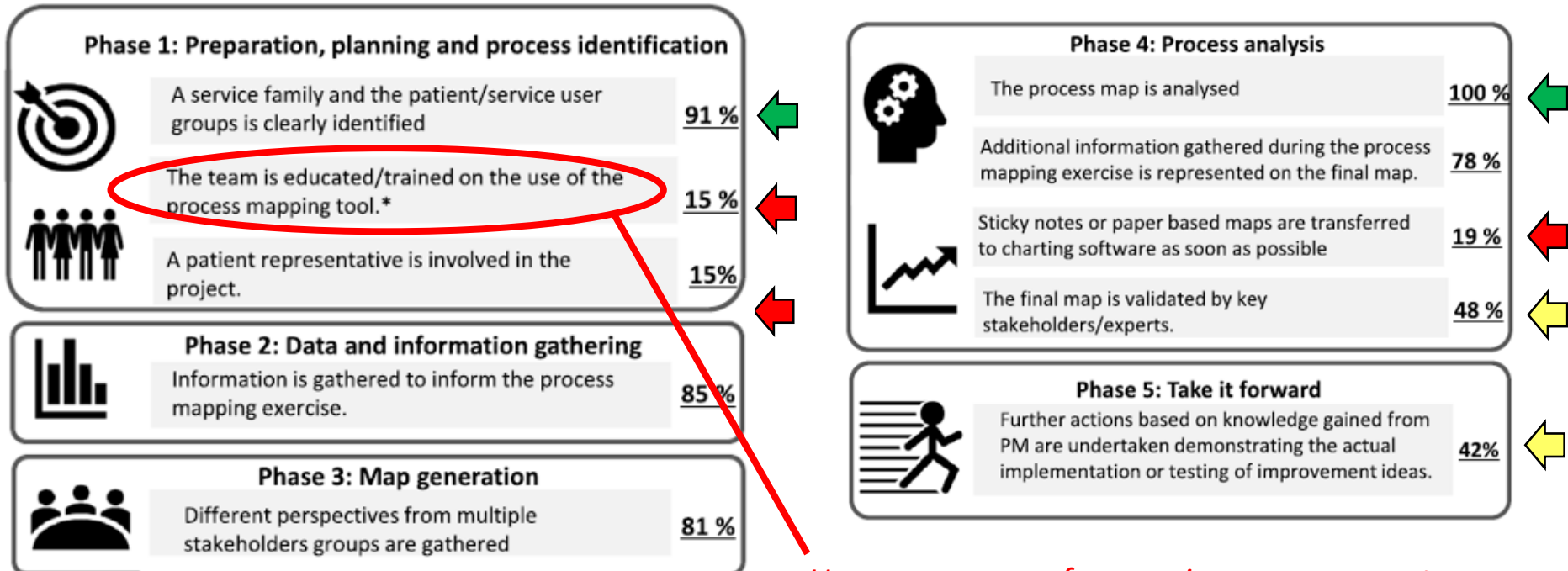


Other "flow" terms:

High level vs. detailed flowchart
Swimlane (functional) flowchart

HOW TO MAKE BEST USE OF PROCESS MAPS

Findings from a meta analysis: 105 healthcare process studies reviewed



Use process map for ongoing management.

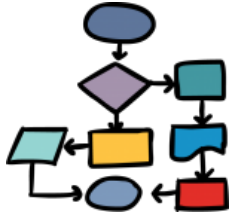
Poll



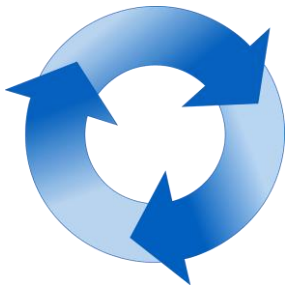
Do you regularly maintain and manage workflows for UDS measures?

- 1-2 measures
- 3-5 measures
- 6+ measures
- No
- Not sure

WORKFLOW EXAMPLES



- Depression Screening & Follow-up Plan (DS)
- Cervical Cancer Screening (CCS)
- Breast Cancer Screening (BCS)



- Use eCQM measure workflows to inform staff and EHR/PHM workflows

Find an eCQM

Preventive Care and Screening: Screening for Depression and Follow-Up Plan

- Measure Information
- Specifications and Data Elements
- Release Notes

Compare Versions of: "Preventive Care and Screening: Screening for Depression and Follow-Up Plan"

The Compare function compares two years of the measure specifications found in the header of the measure's HTML. It does not include a comparison of any information in the body of the HTML, e.g., population criteria, Clinical Quality Language, or value sets.

Strikethrough text highlighted in red indicates information changed from the previous version. Text highlighted in green indicates information updated in the new eCQM version.


COMPARE **2024** VERSION TO

2023 


Compare >

Reset

FILTER MEASURE BY


All Information 

DOWNLOAD

Download 

Use
Compare
years to
easily
review
updates



| Measure Information | 2023 Performance Period | 2024 Performance Period |
|---------------------|---|---|
| Title | Preventive Care and Screening: Screening for Depression and Follow-Up Plan | Preventive Care and Screening: Screening for Depression and Follow-Up Plan |
| CMS eCQM ID | CMS2v12 | CMS2v12 CMS2v13  Review changes |
| CBE ID* | Not Applicable | Not Applicable |
| MIPS Quality ID | 134 | 134 |
| Measure Steward | Centers for Medicare & Medicaid Services (CMS) | Centers for Medicare & Medicaid Services (CMS) |
| Description | Percentage of patients aged 12 years and older screened for depression on the date of the encounter or up to 14 days prior to the date of the encounter using an age-appropriate standardized depression screening tool AND if positive, a follow-up plan is documented on the date of or up to two days after the date of the qualifying encounter | Percentage of patients aged 12 years and older screened for depression on the date of the encounter or up to 14 days prior to the date of the encounter using an age-appropriate standardized depression screening tool AND if positive, a follow-up plan is documented on the date of or up to two days after the date of the qualifying encounter |
| Measure Scoring | Proportion measure | Proportion measure |
| Measure Type | Process | Process |

| Measure Information | 2023 Performance Period | 2024 Performance Period |
|------------------------|---|--|
| Initial Population | All patients aged 12 years and older at the beginning of the measurement period with at least one qualifying encounter during the measurement period | All patients aged 12 years and older at the beginning of the measurement period with at least one qualifying encounter during the measurement period |
| Denominator | Equals Initial Population | Equals Initial Population |
| Denominator Exclusions | Patients who have ever been diagnosed with depression or with bipolar disorder at any time prior to the qualifying encounter | Patients who have ever been diagnosed with depression or with bipolar disorder at any time prior to the qualifying encounter |
| Numerator | Patients screened for depression on the date of the encounter or up to 14 days prior to the date of the encounter using an age-appropriate standardized tool AND if positive, a follow-up plan is documented on the date of or up to two days after the date of the qualifying encounter | Patients screened for depression on the date of the encounter or up to 14 days prior to the date of the encounter using an age-appropriate standardized tool AND if positive, a follow-up plan is documented on the date of or up to two days after the date of the qualifying encounter |
| Numerator Exclusions | Not Applicable | Not Applicable |
| Denominator Exceptions | Patient Reason(s)Patient refuses to participateORMedical Reason(s)Documentation of medical reason for not screening patient for depression (e.g., cognitive, functional, or motivational limitations that may impact accuracy of results; patient is in an urgent or emergent situation where time is of the essence and to delay treatment would jeopardize the patient's health status) | Patient Reason(s)Patient refuses to participate in or complete the depression screening ORMedical Reason(s)Documentation of medical reason for not screening patient for depression (e.g., cognitive, functional, or motivational limitations that may impact accuracy of results; patient is in an urgent or emergent situation where time is of the essence and to delay treatment would jeopardize the patient's health status) |

Review changes



Find an eCQM

Preventive Care and Screening: Screening for Depression and Follow-Up Plan

- Measure Information
- Specifications and Data Elements**
- Release Notes



Specifications

| Attachment | Size |
|--|-----------|
| CMS2v13.html | 102.59 KB |
| CMS2v13.zip (ZIP) | 94.72 KB |
| CMS2v13-TRN.xlsx (Excel) | 22.74 KB |
| CMS2v13-eCQMFlow.pdf (PDF) | 1.62 MB |

Measure
flows



There is a known issue on CMS2v13. See issue [EKI-22](#) on the [ONC eCQM Known Issues Dashboard](#) for details.

eCQM MEASURE FLOWS

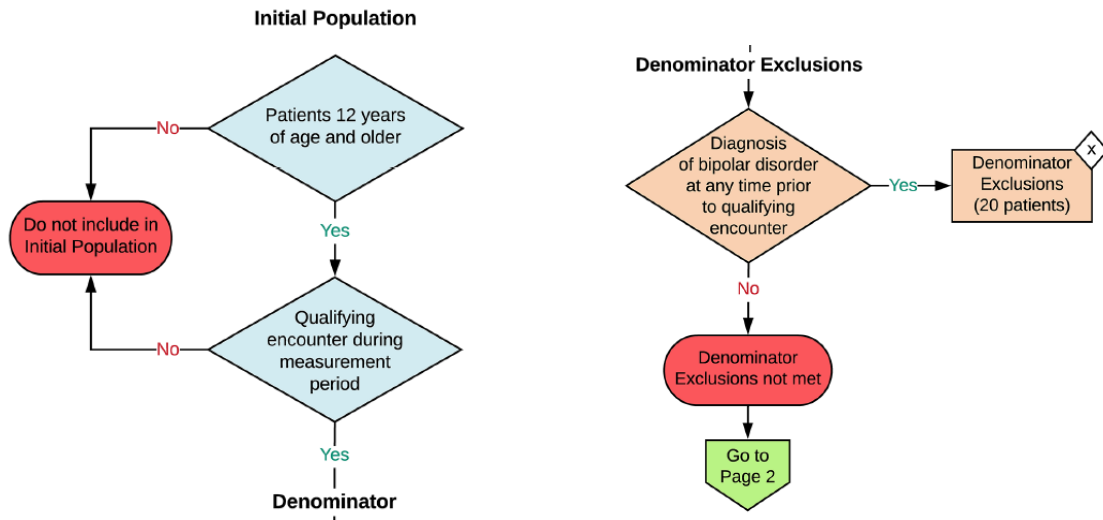
2024 eCQM Flow eCQM Identifier: CMS2v13

NOTE: This flow diagram represents an overview of population criteria requirements. Refer to the eCQM specification for a complete list of data elements included in this measure and required for submission.

Preventive Care and Screening: Screening for Depression and Follow-Up Plan

Percentage of patients aged 12 years and older screened for depression on the date of the encounter or up to 14 days prior to the date of the encounter using an age-appropriate standardized depression screening tool AND if positive, a follow-up plan is documented on the date of or up to two days after the date of the qualifying encounter

This eCQM is a patient-based measure



- Describes the logic for measure calculation
- A data flow for the measure
- Can help inform staff and EHR/PHM workflow



CMS2v13

To Do ▾

▾ Details

Type: EP/EC Resolution: Unresolved

Priority: Moderate

Labels: None

Resolution: Follow current measure logic, as specified, for CMS2v13. For patients that are advised to continue their depression care plan, clinicians can consider mapping to the following codes: SNOMED CT 410234004 (Management of mental health treatment (procedure)) or SNOMED CT 410232000 (Mental health treatment assessment (procedure)). These codes are found in the Follow Up for Adolescent Depression (2.16.840.1.113883.3.526.3.1569) and Follow Up for Adult Depression (2.16.840.1.113883.3.526.3.1568) value sets.

Year: 2024

▾ Description

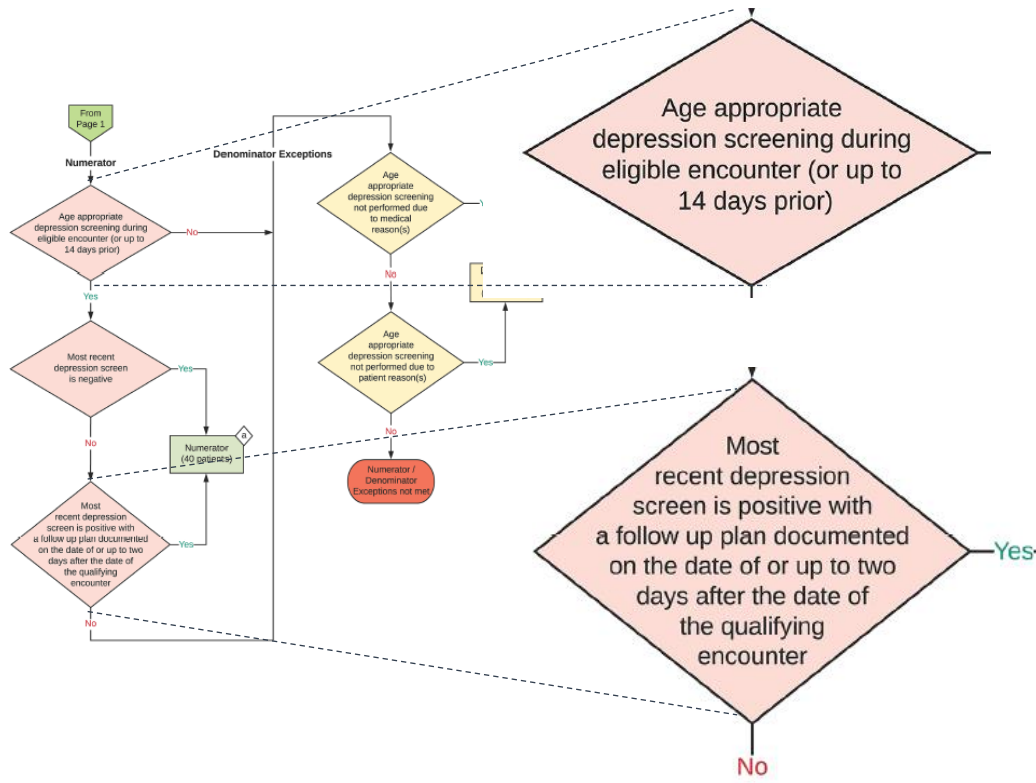
eCQMs Impacted – CMS2v13

Issue – Patients with an active diagnosis of depression who are currently receiving treatment may not meet the numerator criteria for appropriate follow-up after a positive depression screen if there are no changes to the current treatment (e.g., a clinician decides to continue a patient’s antidepressant medication and does not order a refill).

eCQM Known Issues

- Provide implementation information for eCQMs with [known technical issues](#) for which a solution is under development but not yet available in a published eCQM spec.
- Includes [discrepancies](#) between eCQM narrative and logic, value sets, and/or technical, standard, or logic-related issues.
- Used by Health IT developer/vendor, implementer, measure developer/steward

DEPRESSION SCREENING & FOLLOW-UP PLAN



Your Problem Statements

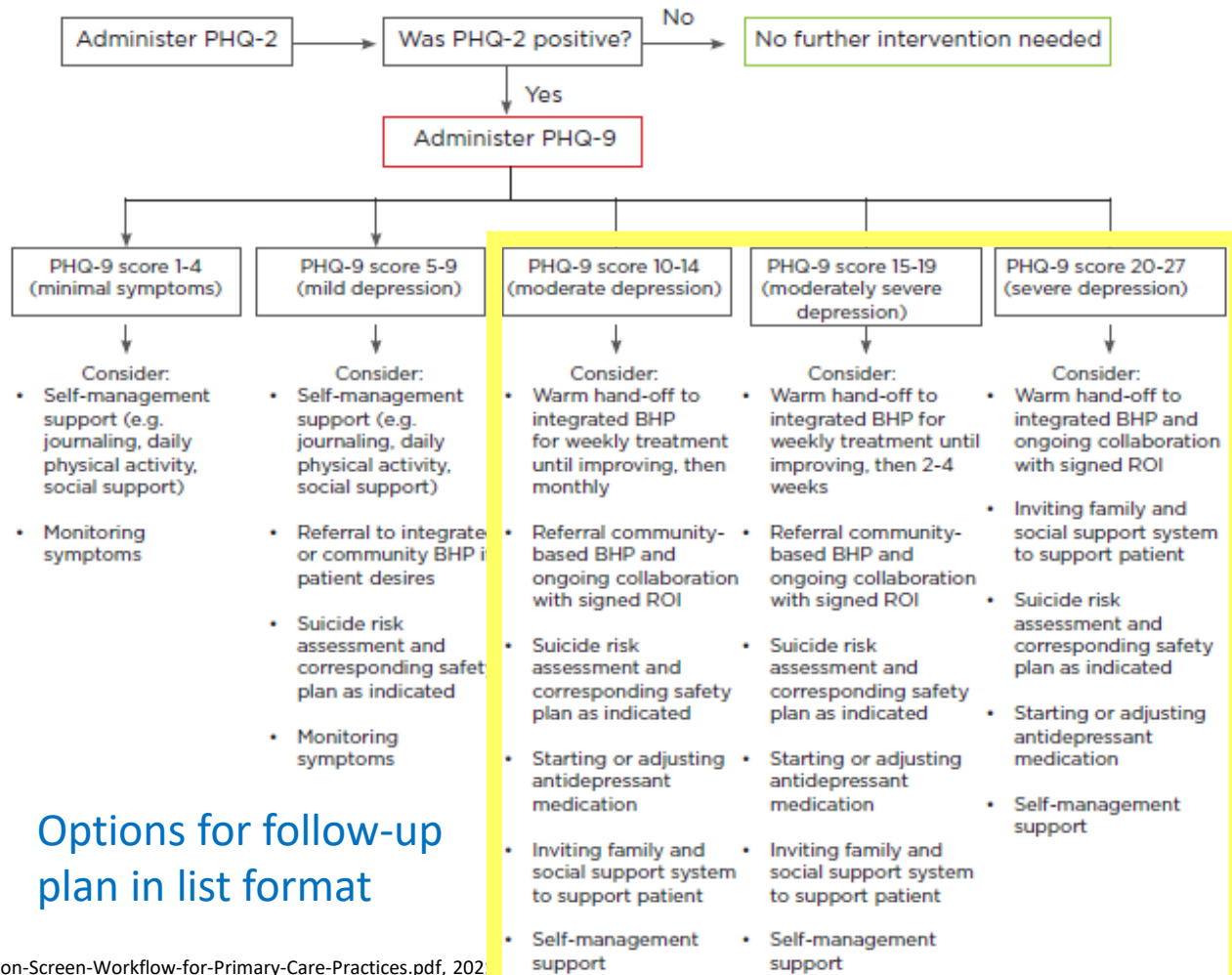
- Not consistently identifying when a depression screening is due and not following established workflows when the screen is +
- Struggle with consistent implementation of workflows that capture screenings accurately
- We don't have an agreed upon standardized workflow
- Trying to capture the screenings but f/u documentation not being captured in an area that satisfies the measure
- Maintaining a consistent workflow because some providers and MAs are not on the same page
- Struggle to teach and maintain a consistent workflow across many clinical sites
- Inconsistent patient screening, documentation and coding practices due to lack of standardized EMR workflows and provider/staff training

DEPRESSION SCREENING & F-U IDEAS FOR ACTION

- People
 - Training on the measure and documentation requirements
 - Addressing staffing and other resource issues
- Process
 - For + screen, f-u plan must be documented on the date or up to two days after qualifying encounter
 - Follow-up plan satisfied by:
 - Suicide risk assessment –OR–
 - New medication order (pharmacologic intervention) –OR–
 - Referral order to a provider for addt'l eval and assess, f/u plan (PsyD, LCSW, MH service/group, etc.) –OR–
 - Manually through QM/measure or billed procedure code (CPT II G8431 for +, G8510 for -)
- Technology
 - Assess EHR workflows and structured data fields in supporting above process

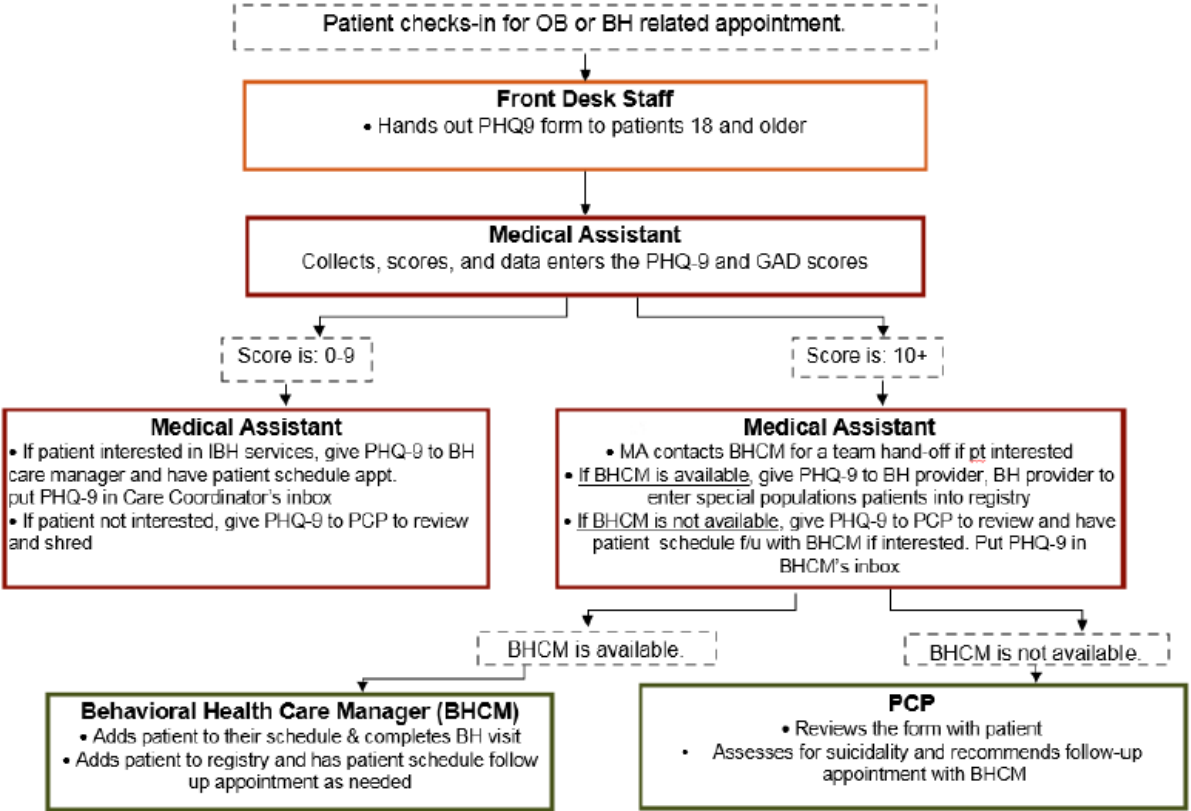


SAMPLE FOLLOW-UP PLANS BASED ON PHQ-9 SCORE



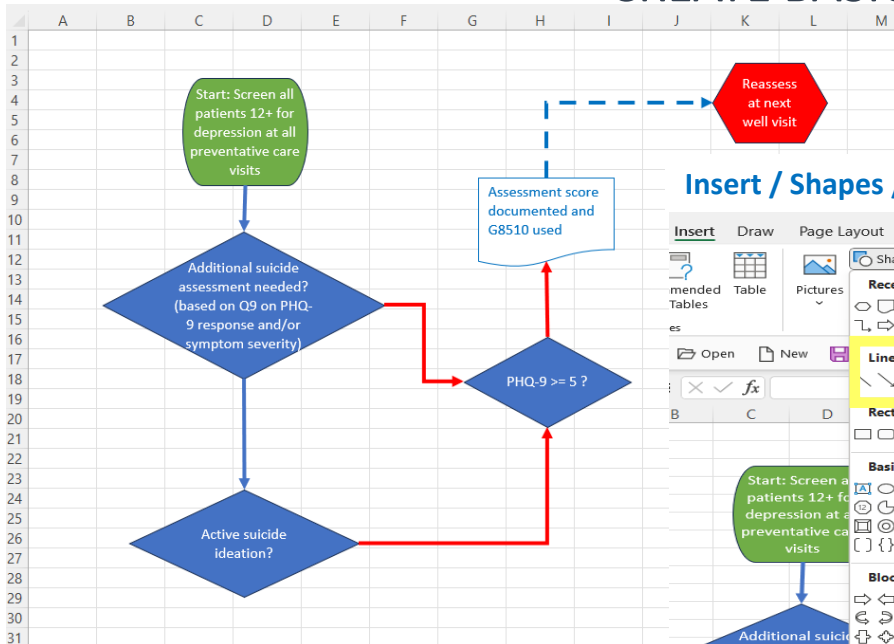
Options for follow-up plan in list format

DEPRESSION SCREENING WORKFLOW EXAMPLE

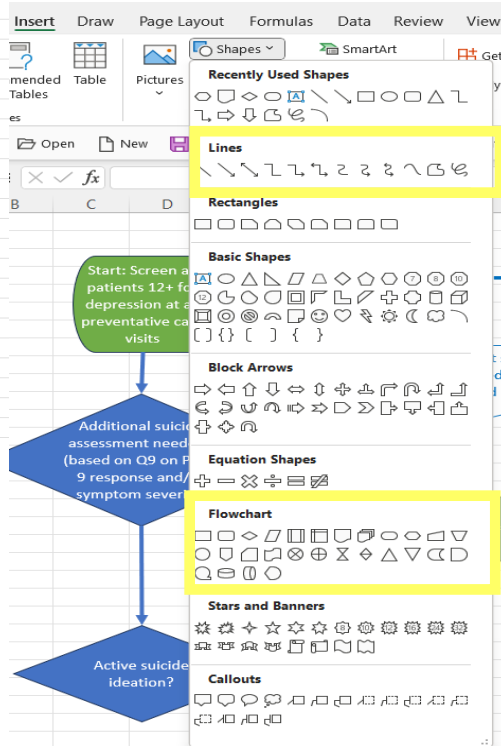


- Another formatting option
- Flow diagram with decision criteria
- Team member roles and responsibilities identified

CREATE BASIC WORKFLOWS IN EXCEL

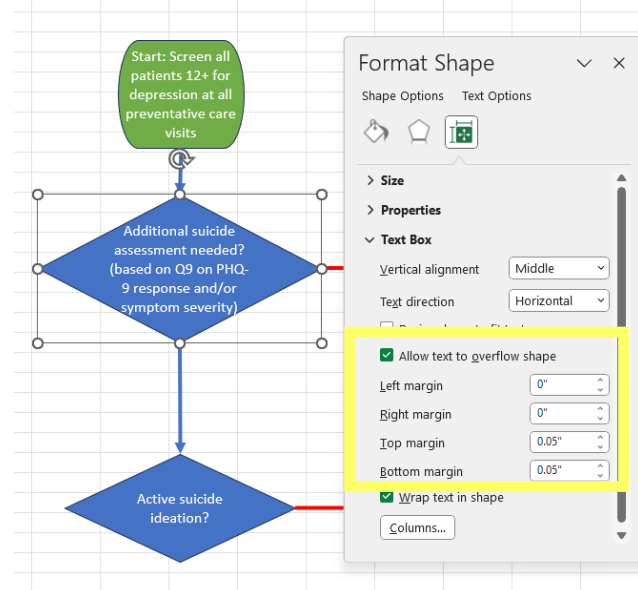


Insert / Shapes / Flowchart & Lines



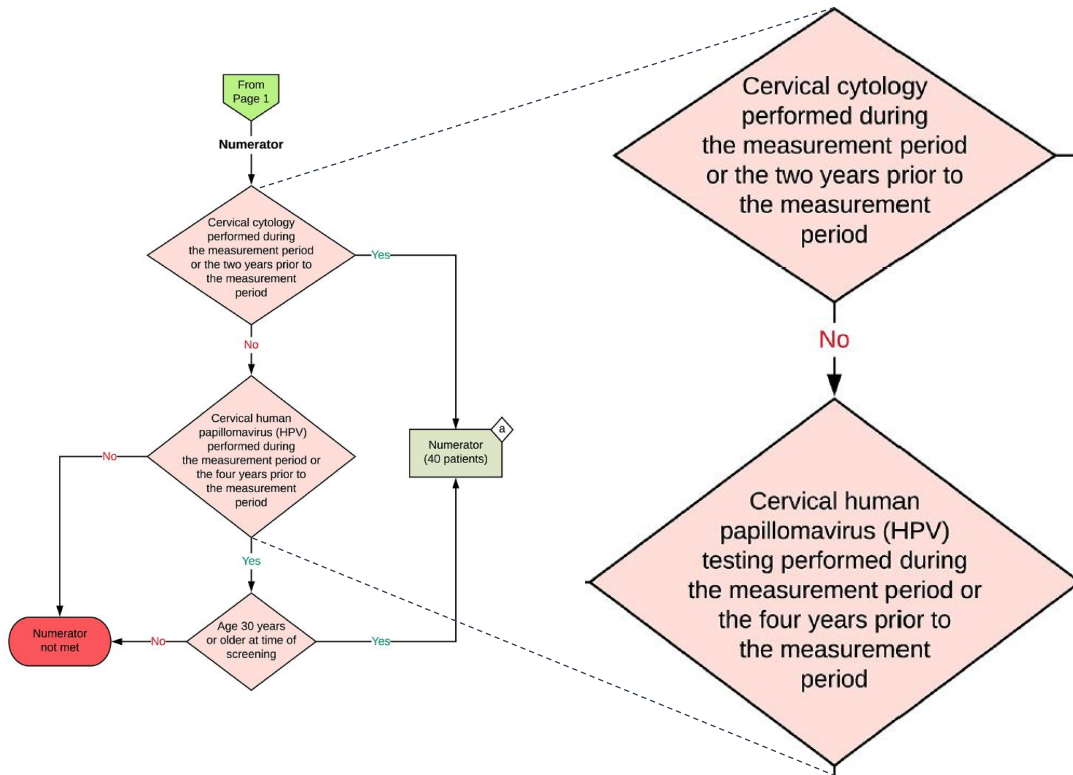
[Select shape] / [add text]
 [Select shape] / [right click] / Format Shape
 [Select "Allow text to overflow" and reduce margins to 0]

Your process mapping tool?



Other process mapping tool options:
<https://miro.com/templates/flowcharts/>
<https://mural.co/use-case/flowchart>
 Visio free trial: <https://www.youtube.com/watch?v=XGNSQDFQGrA>

CERVICAL CANCER SCREENING



Your Problem Statements

- Many of our patients receive screening outside of health center
- Rarely receive historical or specialty records/results
- Screenings are not always documented the same way
- Getting resulted labs for PAPs inputted into structured data within our EMR because many patients receive screening at outside facilities and results are provided via fax
- Not able to capture screenings that occur outside of health center unless a lab/pap was directly ordered by one of our PCPs because EMR only considers reports with corresponding order in the chart
- Data sharing problems ... use of multiple systems that cannot interface electronically with each other
- Trying to obtain reports from external hospital systems
- Do not have reliable documentation of external results in system.. lack standardized workflow identifying roles and responsibilities
- Lack of standardized workflows and facilities/hospitals to refer patients to

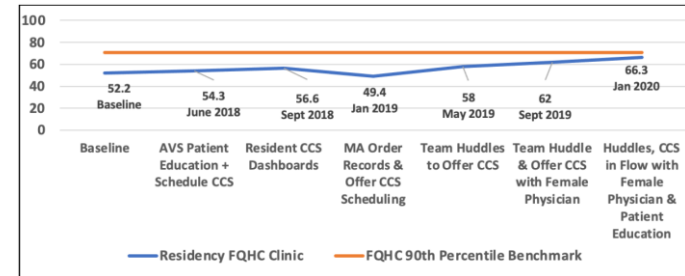
IMPROVING CCS RATES AT AN FQHC (URBAN)

- Method

- A series of resident-run, team-based QI projects were conducted to iteratively improve CCS rates.
- CCS processes at the FQHC were critically analyzed using root cause analysis, process flow, and run charts after each PDSA intervention.

- Results

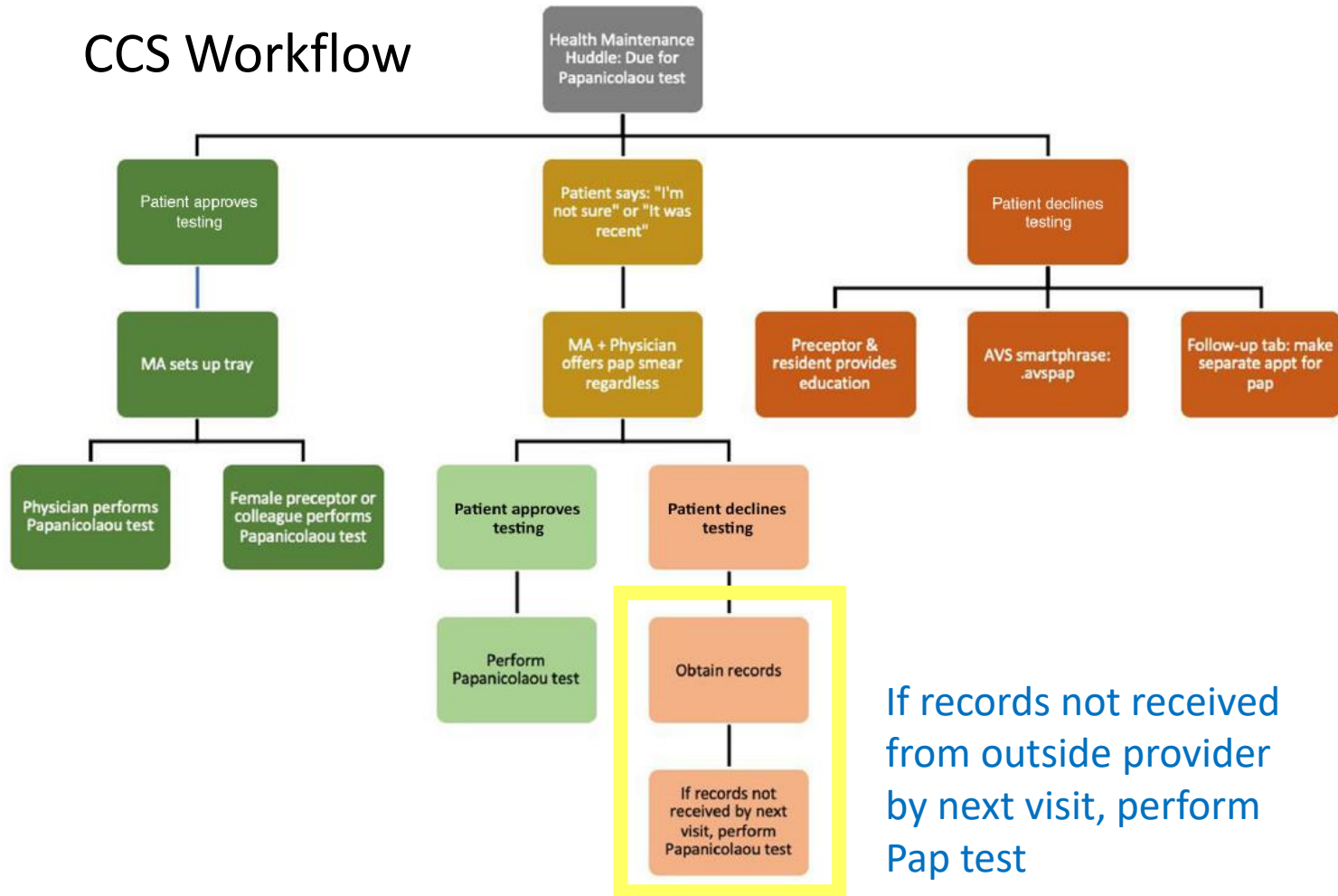
- CCS rates improved from **52%** to **66%** through 6 QI projects (UDS National 2022 is 54%)



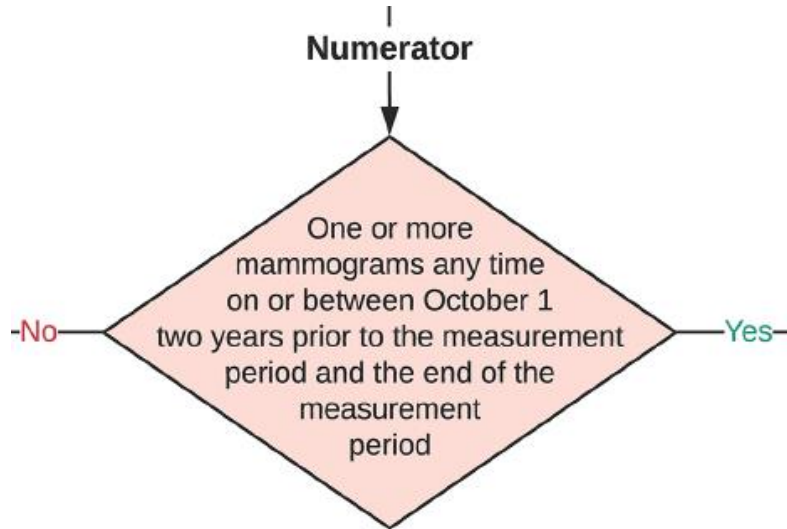
- Lessons Learned

- **Need to slowly refine clinical processes and workflows** to support screening and involve all staff and providers as change agents. It took 6 PDSA cycles for the team to sustain and maintain changes.
- The most practical and useful interventions were:
 - **Providing early CCS to all eligible women if outside records not immediately available**
 - Having CCS planned and offered in advance to reduce clinic cycle time
 - Having a female physician available if requested by a patient
 - Providing adequate patient education
- Poor understanding of CC by patient and fear or embarrassment about the exam are two of the greatest barriers to CCS

CCS Workflow



BREAST CANCER SCREENING



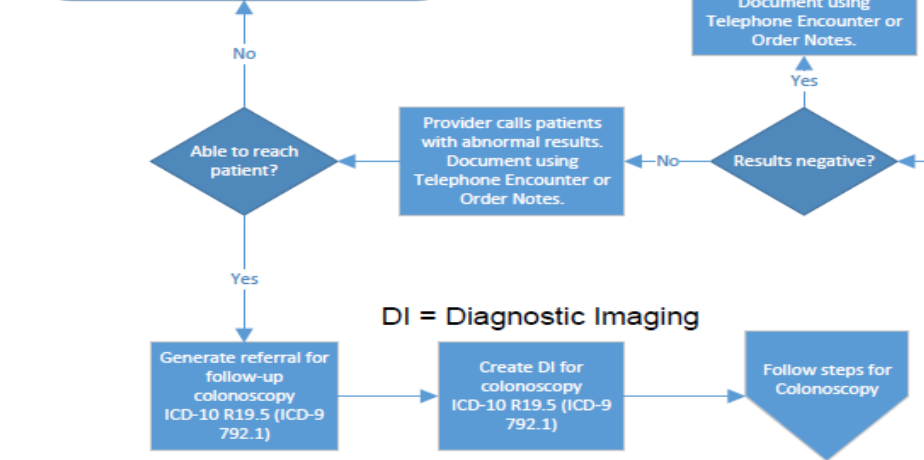
Your Problem Statements

- Trying to improve the accuracy of documented screening provided to our patients, but lack consistently followed screening workflows across clinic sites because of ambiguous EHR click paths
- Receiving the report from the mammogram facility to ensure the proper referral will be offered to the patient
- Getting back the results in EHR; employee time to follow-up with patients and reach out to them to confirm if the mammogram is completed or scheduled an appointment
- Hard time receiving reports from the facility because we do not have a good follow-up process implemented

FIT/FOBT Screening
 Assumes patients 50+ at average risk of CRC
 No symptoms of CRC

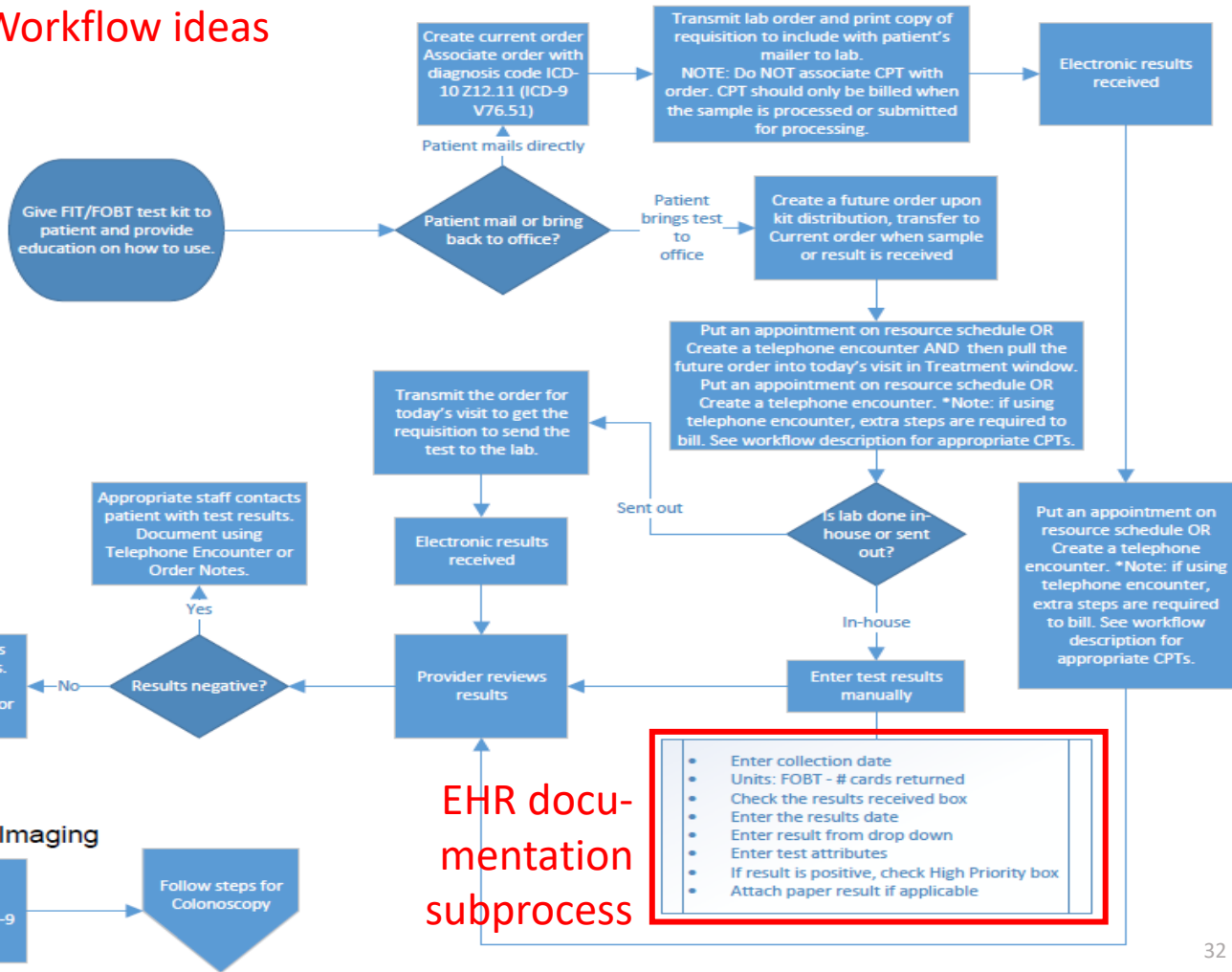
FIT/FOBT SCREENING WORKFLOW EXAMPLE

If unable to reach patient after 3 attempts, leave the telephone encounter open and update the notes section. Last entry should be "sent certified letter". Then close the telephone encounter.



DI = Diagnostic Imaging

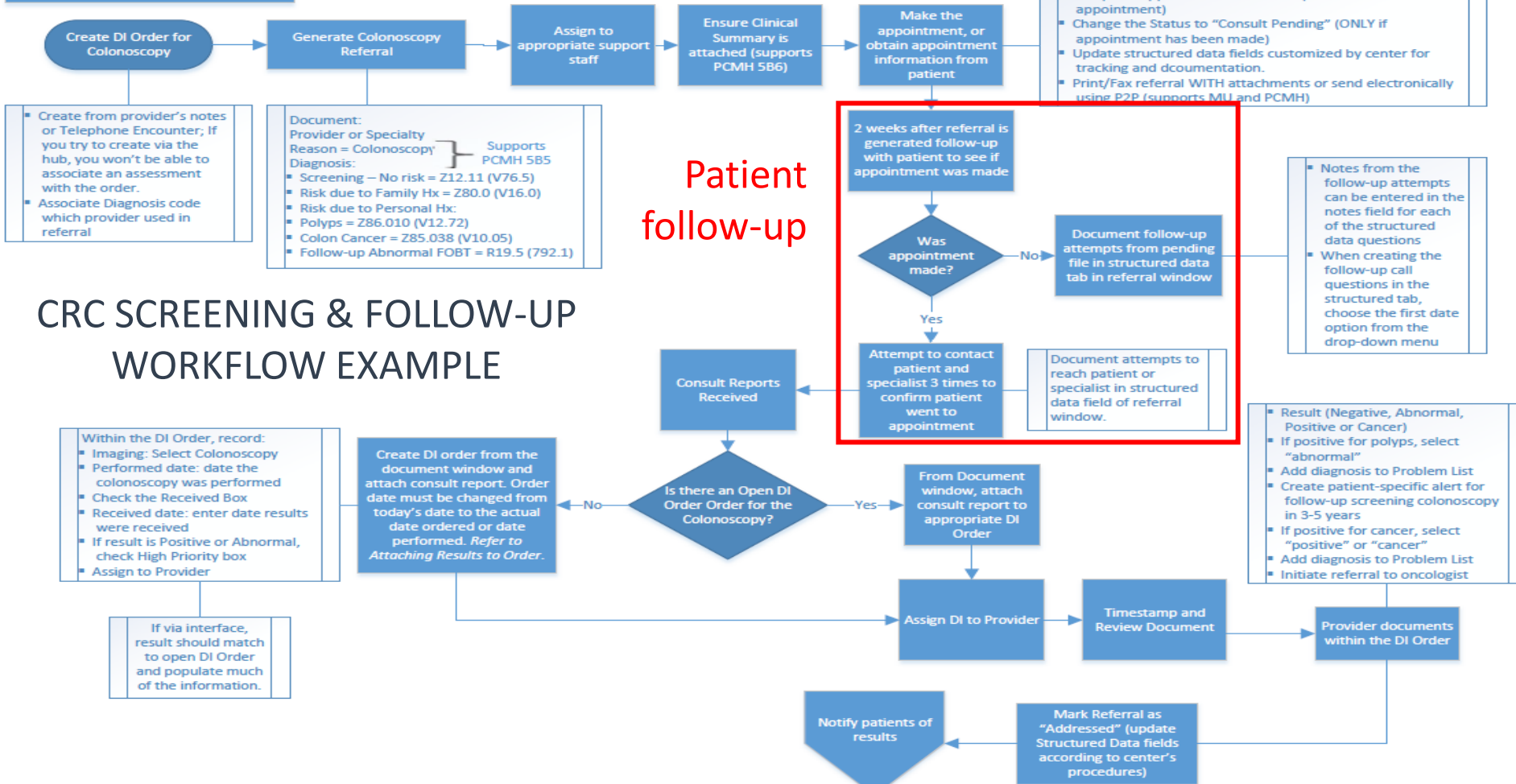
Workflow ideas



EHR documentation subprocess

- Enter collection date
- Units: FOBT - # cards returned
- Check the results received box
- Enter the results date
- Enter result from drop down
- Enter test attributes
- If result is positive, check High Priority box
- Attach paper result if applicable

Colonoscopy (Screening or Follow-Up)



CRC SCREENING & FOLLOW-UP WORKFLOW EXAMPLE

Patient follow-up

Document:
Provider or Specialty Reason = Colonoscopy
Diagnosis: } Supports PCMH 5B5
 ▪ Screening – No risk = Z12.11 (V76.5)
 ▪ Risk due to Family Hx = Z80.0 (V16.0)
 ▪ Risk due to Personal Hx:
 ▪ Polyps = Z86.010 (V12.72)
 ▪ Colon Cancer = Z85.038 (V10.05)
 ▪ Follow-up Abnormal FOBT = R19.5 (792.1)

- Complete Appointment date fields (date & time of appointment)
- Change the Status to "Consult Pending" (ONLY if appointment has been made)
- Update structured data fields customized by center for tracking and documentation.
- Print/Fax referral WITH attachments or send electronically using P2P (supports MU and PCMH)

- Notes from the follow-up attempts can be entered in the notes field for each of the structured data questions
- When creating the follow-up call questions in the structured tab, choose the first date option from the drop-down menu

Document attempts to reach patient or specialist in structured data field of referral window.

- Result (Negative, Abnormal, Positive or Cancer)
- If positive for polyps, select "abnormal"
- Add diagnosis to Problem List
- Create patient-specific alert for follow-up screening colonoscopy in 3-5 years
- If positive for cancer, select "positive" or "cancer"
- Add diagnosis to Problem List
- Initiate referral to oncologist

Within the DI Order, record:
 ▪ Imaging: Select Colonoscopy
 ▪ Performed date: date the colonoscopy was performed
 ▪ Check the Received Box
 ▪ Received date: enter date results were received
 ▪ If result is Positive or Abnormal, check High Priority box
 ▪ Assign to Provider

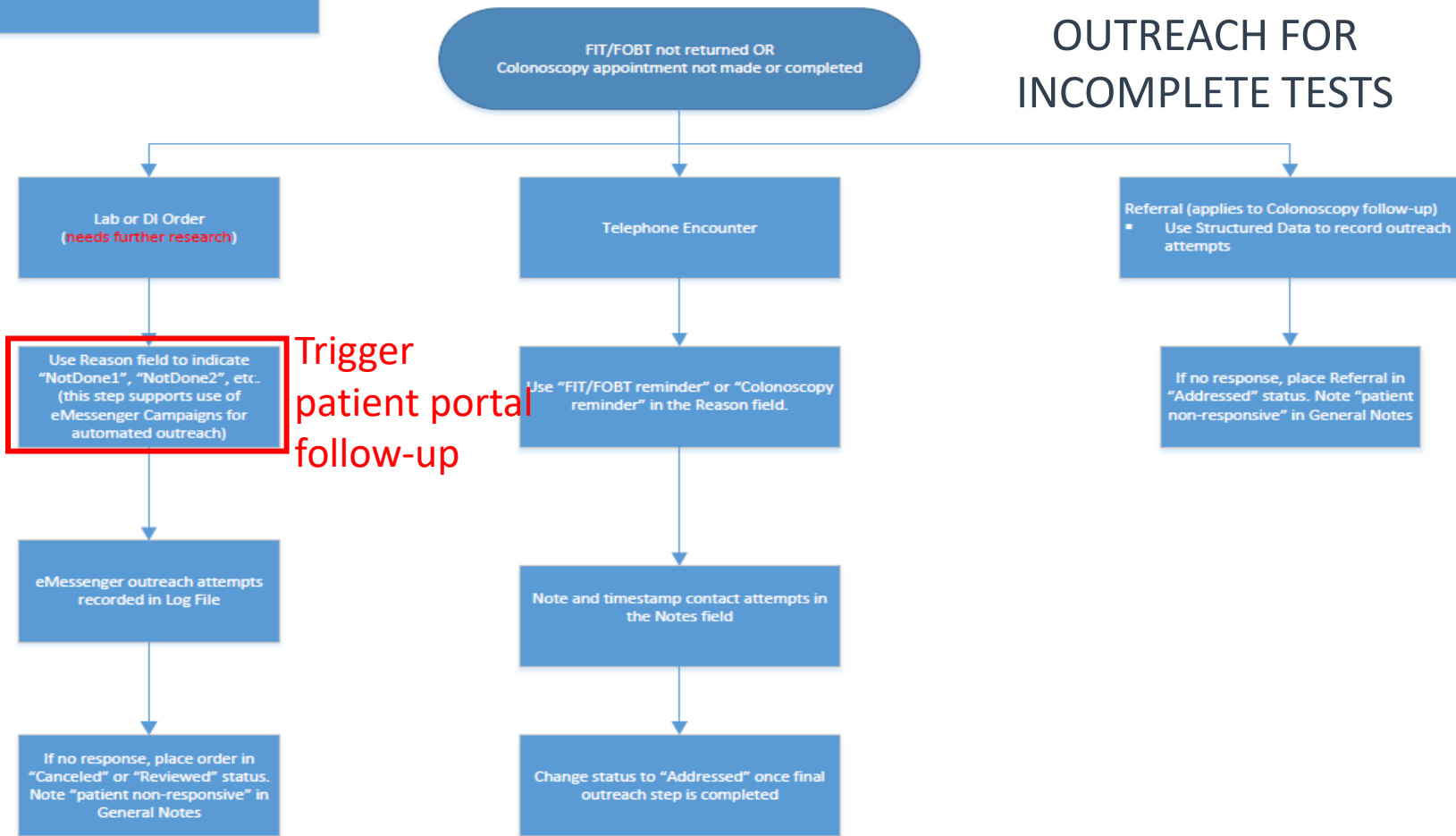
If via interface, result should match to open DI Order and populate much of the information.

Create DI order from the document window and attach consult report. Order date must be changed from today's date to the actual date ordered or date performed. Refer to Attaching Results to Order.

Notify patients of results

Mark Referral as "Addressed" (update Structured Data fields according to center's procedures)

DOCUMENTING FOLLOW-UP OUTREACH FOR INCOMPLETE TESTS



Trigger patient portal follow-up

IDEAS WITH EQUITY FOCUS

Breast Cancer Screening



- Study evaluated feasibility of individualized breast cancer risk assessment in primary care practice as an intervention to increase mammography rate among Black and Hispanic women at increased breast cancer risk
- Custom software application implemented with validated risk assessment tools to be implemented at time of woman's encounter with PC clinician at screening mammogram appointment
- Cohort study of 114 women at FQHC in underserved, racial and ethnic minority communities; **Mammography uptake found to be significantly higher (51% vs 37%)** after receiving individualized breast cancer risk information (UDS Nat'l 2022 is 50%)
- Rural population, IN and OH; **DVD mailed** to women that interactively assessed and provided messages on health beliefs, risk of developing targeted cancers, benefits, self-efficacy
- Patient Navigators (PN) f-u up with non-response and counseled on barriers to obtaining screenings
- Of 963 women, **DVD group 2X likely as usual care group to obtain all needed screenings, and nearly 6X for DVD/PN**

JAMA Network Open 2023;6(4):e2311004. doi:10.1001/jamanetworkopen.2023.11004

Poll



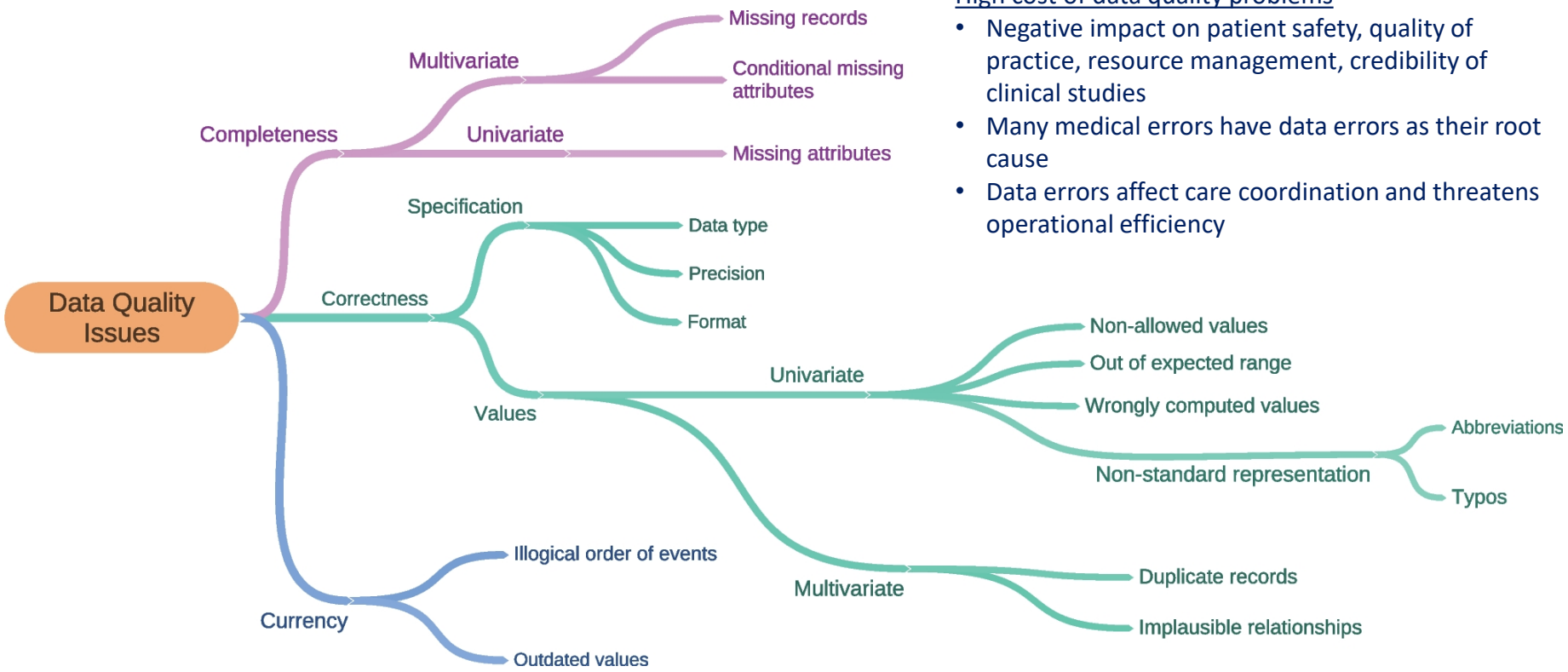
**Participation in RAPID measure
workflow improvement work?
(check all that apply)**

- Local expert(s) or passionate staff on care team
- QI, HIT, DG or management committee
- Senior leadership

HOW TO “HARD WIRE” UDS RAPID MEASURE IMPROVEMENT?



WHY: DATA QUALITY

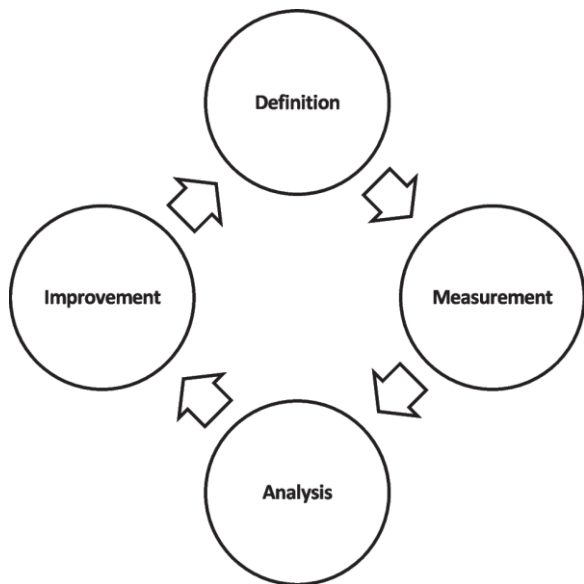


High cost of data quality problems

- Negative impact on patient safety, quality of practice, resource management, credibility of clinical studies
- Many medical errors have data errors as their root cause
- Data errors affect care coordination and threatens operational efficiency

HOW: MANAGE UDS MEASURE LIFECYCLE

Typical Cycle
DQ Assessment



→ UDS measures lifecycle

Ways to improve EHR data quality

• **Preventive interventions**

- Continuous training on use of EHR
- Enforce standards to curb variations in documentation practice
- More focus on data elements commonly needed for secondary use
- Give patients more access to their data (portal)
- Provide tangible incentives to encourage accurate documentation

• **Better usability in EHR design**

- Tailor workflows to match clinical processes
- Intuitive interfaces and documentation support (tooltips, input masks) to guide users when in doubt and promote best practices

WHO: DATA GOVERNANCE & DATA STEWARDS

Data Governance Function Role

- Train data stewards on how to support their measure lifecycle
- Recommend measure documentation to have and maintain
- Define measure lifecycle assessment criteria
- Receive measure lifecycle updates, help prioritize measures of focus, sponsor efforts and allocate resources



Measure Lifecycle Assessment Criteria

- Measure performance
- Data quality, literacy and use
- Workflow integrity

Actions

- Prioritize measure focus (including equity focus)
- Advise on ideas for action (people, process, technology)

BECOMING DATA DRIVEN



| Date/Report Recvd | Program Dept | S. Leader | Source | Impact/ Cost Benefit | Trends |
|-------------------|--------------|-----------|--------|----------------------|--------|
| | | | | | |
| | | | | | |
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Data Stewardship

- Experts (or passionate staff) within a clinic site and/or department are assigned as data stewards for key UDS and other measures of focus
- Measure responsibilities are defined for data quality, data literacy and data use
- Stewards are supported by giving them authority and allocating time

Data Governance

- A forum is designated where decisions are made, priorities set, and resources allocated to improve data management and use for UDS and other priority measures
 - This may be an existing committee or management forum, ideally multi-disciplinary
 - Or start small (or from where you are at), add value, engage senior leaders, and grow from there

Data Services

- UDS and other measure data/report requests are prioritized by the staff or team that analyzes data for the organization
 - This may be a QI, IT or data analyst function
- Data and reports are accessible to relevant staff, presented in ways that are meaningful to their role, and are actionable

GOOD LUCK WITH WORKFLOWS AND UDS MEASURE LIFECYCLE!

Unlike the holiday season, you can never start too soon.

Most people think holiday season starts too early — ‘Christmas fatigue’ is real: survey





QUESTIONS

Send to:
jerry.lassa@datamatt3rs.com

Assistance Available

UDS Support Center

- Assistance with UDS reporting content questions
- 866-UDS-HELP (866-837-4357)
- udshelp330@bphcdata.net

HRSA Call Center

- Assistance with EHBs account and user access questions
- 877-Go4-HRSA (877-464-4772), Option 3
- <http://www.hrsa.gov/about/contact/ehbhelp.aspx>

Health Center Program Support

- Assistance with EHBs electronic reporting or EHB account issues
- 877-464-4772, Option 1
- <http://www.hrsa.gov/about/contact/bphc.aspx>

UDS Mapper

- Assistance with the online service area mapping tool
- <http://www.udsmapper.org/contact-us.cfm>

