

# Using Clinical Decision Support (CDS) Triggers in MedAccess

As adopted from AB Top Docs materials

Presented August 2019 at Comox Valley MedAccess User Group

## What are CDS Triggers?

CDS Triggers are tools within Med Access that can be applied as an approach for proactive preventive care; they can serve as actionable reminders to staff and clinicians to take action to improve care delivery to a patient, alerting them while they're working in the EMR, and linking them to the appropriate place in the EMR to take the preferred action.

CDS Triggers are beneficial tools for 'opportunistic' screening. They can be created to appear in multiple areas of the EMR; there are many types of triggers that can be created. Three trigger types that are beneficial for preventative care are:

- 1) Appointment Triggers: Alert the receptionist or scheduler of actions for the patient. It shows in demographic preview, new appointment, and schedule windows.

The screenshot displays the MedAccess interface. On the left, a calendar view for December 2017 and January 2018 shows a trigger for 'Andre Test' on January 11th. On the right, the 'Registered Patient' form for Andre Test (15 years, 11-Apr-2002, Male) shows triggers for 'Last BMI > 12 months old' and 'Last BP > 6 months old' in the appointment section.

- 2) Demographic Triggers: Appear in the chart header and the demographic tab (see screenshot below, left).
- 3) Visit Triggers: Appear in a Visit and the chart header (see screenshot below, right).

The left screenshot shows the 'Demographics' tab for Andre Test (15 years, 11-Apr-2002, Male) with triggers for 'Last BMI > 12 months old' and 'Last BP > 6 months old'. The right screenshot shows the 'Visits' tab for Andre Test with the same triggers.

Other types of triggers include: Patient Load, Task Options, Profile Item, Allergy, Billing, Criteria, Graph, Prescription. For more details on these see "Clinical Decision Support (CDS) Templates" in the EMR's help files.

Another useful feature of CDS Triggers is that they can be enabled for individual user groups in the clinic. This means that only a certain user group would see the trigger. This provides the clinic with control over who the triggers appear for.

## Examples of Use of CDS Triggers

- To prompt for other condition-appropriate services (i.e.: OA Agreement Letter, Quit Now Referral, Special Authority Forms, Care Plan, etc.)
- When screening is due (i.e.: Diabetic screening, Colon Cancer, Cervical Cancer, PHQ9/GAD-7, etc.)
- When patient contact or billing information is missing

## How to Create a Basic CDS Trigger to Prompt for Screening

Before beginning, consider which clinical information needs to be identified, what group of patients should the trigger apply to, which clinic role(s) (person) need to identify that information, and which location (tab) in the EMR they would be working in when that trigger comes in. Then, review the existing list of CDS Triggers already in your EMR to see if there is one prebuilt that will suit.

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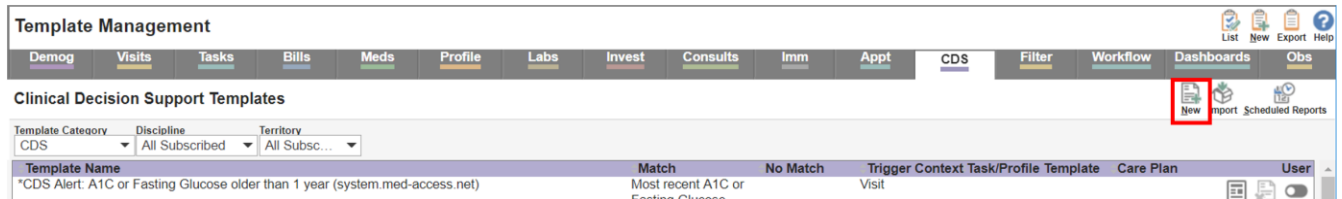
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For the purposes of this example we will show how to create a basic CDS trigger that is an Appointment type (appearing in the appointment window, the scheduler, and the patient chart header) and alerts when patients are due for blood pressure screening.

1. Click on the Templates icon in the tool bar on the main screen of the EMR.



2. Click on the CDS Tab in the Template Management window and click the New icon in the top right-hand side of that section.



3. In the New Template window, enter a name for your new trigger template (i.e.: ASaP – Blood Pressure Screen). If you will be creating a template that is only being used by yourself (not clinic-wide), it is best practice to use a naming convention that contains your initials (i.e.: AJ ASaP – Blood Pressure Screen).
4. Enter in the Trigger field what type of Trigger you would like it to be; for this example, it will be an Appointment type.
5. Enter the CDS Match Message (what you want it to say when it appears due to matched data parameters); for this example, “Patient due for BP screening”.
6. Set Data criteria type=Relative to ensure that date ranges will adjust as time passes; by doing this, it won’t just trigger for those who meet the criteria the date the template was created.
7. Set the parameters for the patient cohort you would like your template to apply to:

- Demographics
  - Status=Active
  - Primary Provider=Physician you’re using the trigger for
  - Age Range=18 to 79
- Observation – select the “not” check box
  - Observation (check both tick boxes) Exact “BP diastolic”
  - Date=[look back 12 months from current date] to [current date]

Note: If you already have created a report that searches for the particular cohort of patients you’re looking for, you can choose that template in the Copy Template drop down, rather than complete Step 7, and not have to set the parameters in the lower section of the CDS New Template window (it will auto populate with your template criteria when you indicate that template in the “Copy Template” field). You will still need to do steps 4-6 after.

8. Click “Save at the bottom; you will return to the CDS tab of the Template Management window.
9. In this window, “turn on” the CDS trigger you created for User (if you see two on/off toggles – one for User and one for Clinic – do not use the Clinic one unless everyone using your EMR has agreed they would like the CDS Trigger turned on; while you can mass-turn-on, you cannot mass-undo or turn-off).

Best practice when creating a template in MedAccess is to test it on a Test Patient chart, ensuring it appears and functions as intended. To do so, open a Test Patient, and apply the template, ensuring all the fields appear and work as anticipated.