

Creating a Reminder for GSK immunizations in Allscripts TouchWorks EHR



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Ensure timely and appropriate immunization orders and administration

Keeping track of patient immunization requirements is an important aspect in the delivery of ongoing patient care. Alerts based on patient age, immunization history, time since previous immunization, and risk factors help streamline care and reduce the burden on providers to keep track of recommended immunization requirements. This is especially helpful to ensure patients complete all doses in an immunization series. In Allscripts TouchWorks EHR, these alerts are called **Reminders**.

Benefits of Reminders

Automated **Reminders** reduce the need to manually check records to assess patient immunization needs, and help ensure that patients receive appropriate and timely immunizations according to the Centers for Disease Control and Prevention (CDC) recommendations.

Considerations:

- **Reminders** for immunizations are **not** automatically created when an immunization is added to the electronic health record (EHR) immunization schedule, must be created for each new immunization. The **Reminder** will trigger based upon immunization history
- An immunization administered by another practice or in the pharmacy may not have been documented in the EHR; a **Reminder** could be triggered for an immunization the patient has already received. Maintaining updated immunization history for patients will minimize duplication
- User privileges to create **Reminders** may be limited to select users with specific security privileges or subject to practice business policies

This guide provides a high-level overview of how to create a Reminder within the Allscripts TouchWorks EHR. This overview is designed to provide guidance for you, your practice's EHR champion, or IT staff.

Please note that this guide was created based upon Allscripts TouchWorks EHR version 20.0. Screens and features may change as new software versions are released.

This guide is for informational purposes only and is not intended to replace detailed instructions provided to you by your internal or external EHR support resources. The information in this guide is subject to change without notice. GSK makes no claims or warranties about the applicability or appropriateness of this information.

If you have further technical questions, consult your internal or external EHR support resources.

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Allscripts TouchWorks EHR enables the setup of **Reminders** based on criteria set in the **Clinical Rules Editor**. Available criteria include diagnosis, current and prior medications, lab values, and due or past due immunizations. The **Reminder** is displayed when the data in the patient chart meet the criteria.

For example, a **Reminder** may be created to alert providers of patients who have missed the second dose of an immunization series.

The following steps illustrate how to create **Reminders** to identify patients who may be due or overdue for a second dose of Product X. First a **Query** must be created to identify the patients, and then a **Reminder**, which will display for those patients.

To run a Query

- Navigate to **Patient Query**
- Select **Manage Queries** and select **New**
- Add a **Query Name**, and select **OK**

The screenshot displays the 'Patient Query' management interface. On the left is a navigation menu with 'Patient Query' selected. The main area is divided into three panes:

- Search Patient Population Queries:** Includes a search box and dropdowns for 'Name' and 'Contains'.
- Patient Population Queries Table:**

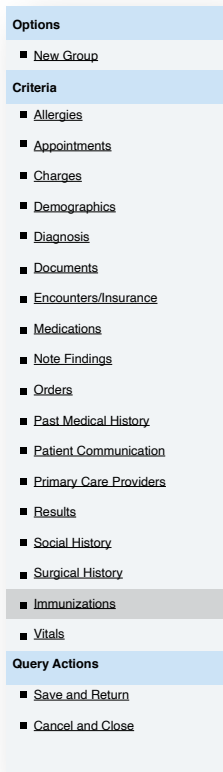
Query Name	Last Process	Status
Pneumococcal	12/02/2020 08...	Successful
Polycystic Kidney Disease Patients	03/12/2020 08...	Successful
Portal Patient Status	03/30/2019 08...	Successful
Proteinuria greater than 500 mg/dl	05/28/2019 08...	Successful
Reminders - Hep B A	07/07/2019 08...	Successful
Reminders - Hep B C	07/08/2019 08...	Successful
Reminders - Hep B G	07/07/2019 08...	Successful
Reminders - Hep B M	07/07/2019 08...	Successful
Reminders - Hep B M	07/07/2019 08...	Successful
Reminders - Hep B R	07/07/2019 08...	Successful
Reminders - Hep B S	07/08/2019 08...	Successful
Reminders - Product X	10/08/2019 08...	Successful
- Patient Population Queries Details:** Shows 'Query Rule: Product X' with a definition: 'Include patients > / = 50 years of age overdue for use'. Below this is the 'Action Set Details' pane, which currently shows 'No action set linked'.

At the bottom, there are buttons for 'Manage Queries', 'Delete', 'New', 'Edit', 'Add Existing', and 'Remove'.

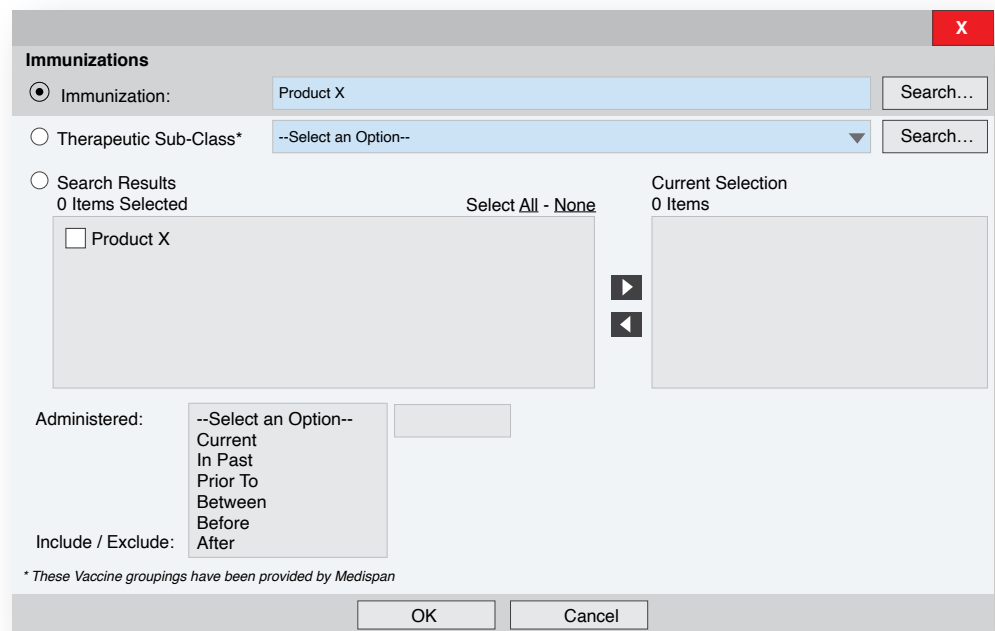
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- From the **Criteria** list, select **Immunizations**



- Search for and select criteria for the **Query**; for example, **Product X**
- Select **OK**. From the **Query Actions** list, select **Save and Return**
- Add additional criteria to the **Query** as appropriate



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To create a Reminder

After the **Query** has been created, an **action set** must be created to associate the action, which is the **Reminder**, with the **Query**:

- Search for and choose the **orderable item** to be used to create the **Reminder**
- Select **Save** and **Return**

Orders

Order:

Type:

Search Results
1 Items Selected Select All - None Current Selection
1 Items

Product X

Found 1 **Order** items

Status:

Scheduled to be performed by:

Choose Specific Provider(s)

Include / Exclude:

- In **Action Set Properties**, select a defined **Patient Query** and create a new **Patient Action Set**

Action Set Properties	Patient List	Patient Communication	HMP Reminders	Tasks	Export File
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- Create a new **Patient Action Set** to create the **Reminder**

Action Set Properties | Patient List | Patient Communication | HMP Reminders | Tasks | Export File

Patient Action Name: Patient overdue for Product X Unique Acton Set ID: 0

Patient Action Description: Patient overdue for Product X

Associated Patient Population Queries: [Empty]

Associated Specialty (Optional): There are no Associated Specialties

- Choose the order that the **Reminder** is for

Search Order items For Reminder

Order Type: Immunizations Order Sub Type: [Empty] Product X

Select Order Item

Entry Name: Product X

Accept Cancel

- Choose how often the **Reminder** should reappear

Action Set Properties | Patient List | Patient Communication | HMP Reminders | Tasks | Export File

1. Select a Reminder Type: Select New Reminder Name: [Empty]

2. Select a Frequency Method:

Recurrence
The To Do Date will automatically be calculated from the Most Recent Date any time a most recent date exists in the patient chart. When there is no previous occurrence, then the To Do Date will be calculated on the Start Date.

Start Date: [Empty] When no previous instance exists in patient's chart.

Frequency: Every 0 [Dropdown]

End Date: No End Date
 End After 0 Occurrences
 End By [Empty]

Age Based

Months: [1-12]
Years: [1-12]

Deferrals:
 Defer Temporarily Defer Permanently
Defer for: 0 [Dropdown]
Deferral Reason: [Dropdown]

Defined Reminders:
Highlight the Reminder to display the details

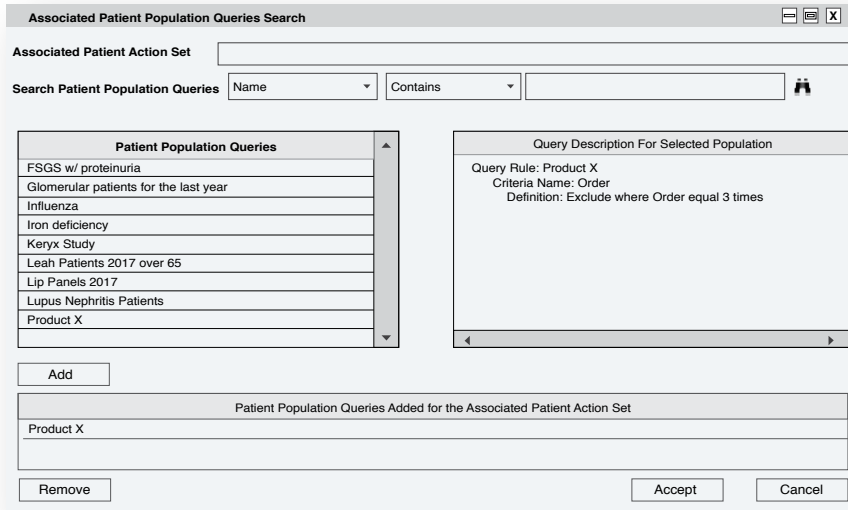
Product X
Recurrence
Start Date: July2020
Frequency: every 1 Years
End Date: 3 Occurrences

Add Remove Cancel

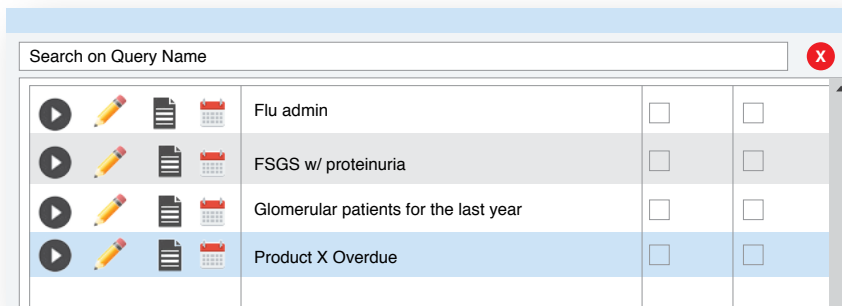
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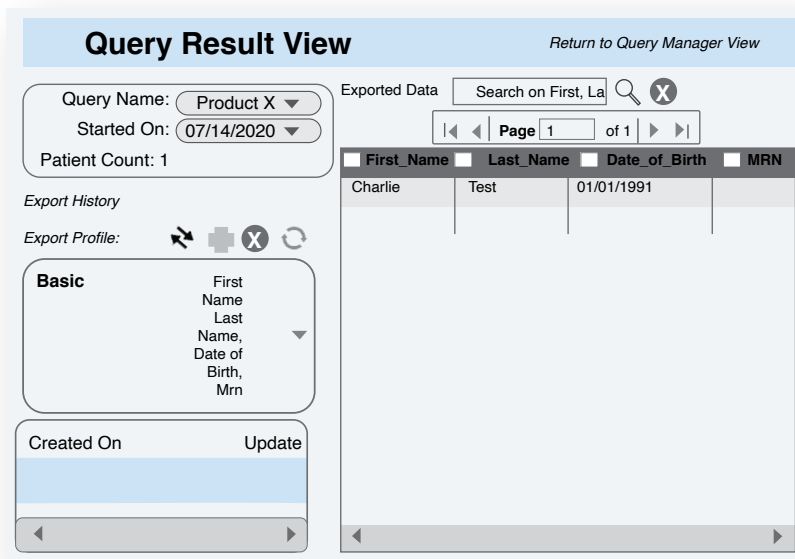
- In the **Action Set Properties** tab, associate an **Action Set** to the **Query** created



- Run the **Query**



- View the **Query** results and export the results



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- The **Alert for Due/Overdue dose** of Product X displays in the **Encounter Summary** and in the **Health Management Plan** section of the patient chart

Encounter Summary

Billing: Performing:

View By: Type Pat Loc:

Alert Last Updated: 15July2020. 08:38AM
Alert Displayed: Active for

- HbA1c monitoring at least two times a year is recommended for patients with a diagn
- LDL monitoring is recommended for patients with an active diagnosis of diabetes
- Tobacco cessation counseling or pharmacotherapy is recommended for patients that counseling or pharmacotherapy.

☐ **All Other Alerts**

- ⚠ Product X Due 06/01/2020

New

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