

Creating an Alert in eMDs Solution Series EHR

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 eMDs Solution Series EHR, these are called **Alerts**.

Benefits of Alerts

Automated **Alerts** 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:

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

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

This guide provides a high-level overview of how to create an Alert within eMDs Solution Series 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 eMDs Solution Series EHR version 9.1. 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.

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eMDs Solution Series enables the setup of **Alerts** based on criteria set in the **Clinical Rule Manager**. Available criteria include diagnosis, orders, current and prior medications and due or past-due immunizations. The **Alerts** are displayed when the data in the patient chart meet the criteria.

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

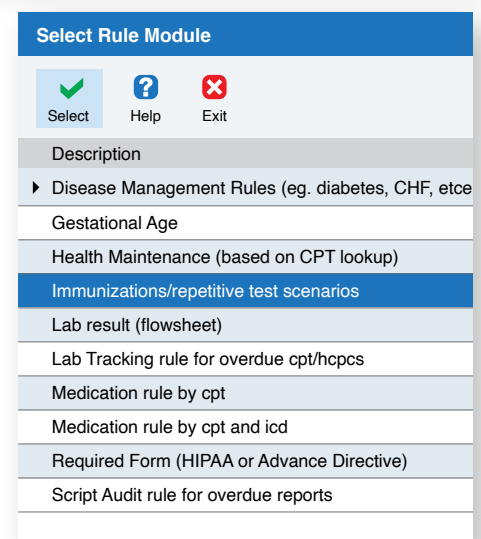
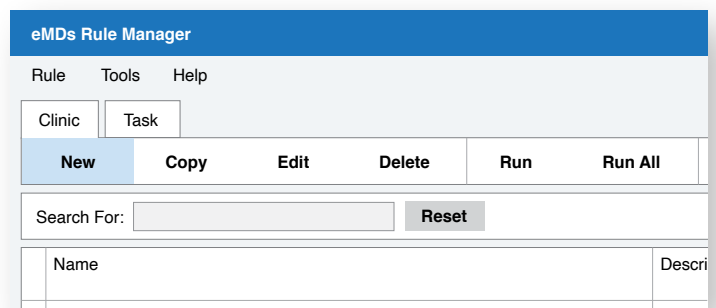
The following steps illustrate how to create **Alerts** to identify patients who may be due or overdue for a second dose of Product X:

To create a Clinical Rule for Alerts

In situations where a second immunization is recommended to be given within a certain amount of time after the first dose, it is necessary to create two separate **Clinical Rules**.

1. First Dose Rule

- Open the **eMDs Rule Manager** module and select **New**
- The **Select Rule Module** window displays a list of all available rule types
- Choose the rule type **Immunizations/repetitive testing scenarios** and click **Select**



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- The **New Rule** window displays
- In the **New Rule** window, add a **Rule Name** which will display in patient charts. For example, “Product X immunization – 1st dose”
- Add a **Result Description** that clearly describes the focus of the **Rule** and any actions that need to be taken. For example, “Product X immunization – 1st dose – all patients aged 18 and older”
- Select the **Rule Active** box
- Optional: If the **Rule** will be displayed on the patient portal, check the **Available to portal** box in the **Rule** tab, and enter a patient-friendly **Portal Description**. For example, “You are due for a Product X immunization”
- Set **Gender** to **All patients**
- Set the **Minimum Age** and the **Maximum Age**, as appropriate
- Set **User Roles** to determine who can see the **Rules** in the patient chart
- Set the **Number of Times** field to 1 to denote that this **Rule** is only looking for one occurrence of the immunization

The screenshot shows the 'New Rule' configuration window. At the top, there are icons for Save, Specialty, Help, and Exit. The main form contains the following fields and options:

- Rule Name:** Product X -1st dose
- Result Description:** Product X immunization - 1st dose-all patients aged 18 and older
- Rule active
- Rule Tab:** Selected, with other tabs for Drug Allergy Triggers, CPT Satisfiers, Result, Specialty, Info, and Source.
- Available to portal
- Portal Description:** You are due for Product X immunization
- Gender:** All patients, Male, Female
- Minimum Age:** Weeks: 0, Months: 0, Years: 18
- Maximum Age:** Weeks: 0, Months: 0, Years: 110
- User Roles:** Providers, Clinical staff, Non-clinical staff
- Rule Reminder:** 60 (days before due)
- Number of Times:** 1 (cumulative number of times the patient needs to have this test done)
- Patient Only (Optional):** [Empty field]

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- Select **CPT Satisfiers** to set the **CPT code** that the **Rule** will look for
- Select **Add**; search for and select the appropriate **CPT code**
- Select **Save** to activate the **Rule**

Rule Name	Product X -1st dose				
Result Description	Product X immunization - 1st dose-all patients aged 18 and older				
<input checked="" type="checkbox"/> Rule active					
Rule	Drug Allergy Triggers	Drug Allergy Triggers	CPT Satisfiers	Result	Specialty
+ Add		X Delete			
Code	Description				
▶ 99999	Product X immunization	Save			

2. Second Dose Rule

- To create a new **Rule** for the second dose of Product X, open the **Rules Manager** module and select **New**
- Select **Immunizations/repetitive testing scenarios**
- Add a **Rule Name** for the 2nd dose. For example, “Product X immunization – 2nd dose due 6 months after 1st dose”
- Add a **Result Description** for the 2nd dose. For example, “Product X immunization – 2nd dose – all patients aged 18 and older – due 6 months after 1st dose”
- Select the **Rule Active** box
- Optional: Select **Available to portal** and add **Portal Description** as appropriate. For example, “You are due for a second dose of Product X immunization 6 months after the first dose”
- Set **Gender** to **All patients**
- Set the **Minimum Age** and the **Maximum Age** the same as the 1st dose **Rule**
- Set **User Roles** the same as 1st dose

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- Set the **Number of Times** field to 2 to denote that this **Rule** is looking for 2 occurrences of the immunization

Save Specialty Help Exit

Rule Name: Product X immunization - 2nd dose due 6 months after 1st dose

Result Description: Product X immunization - 2nd dose - all pts aged 18 and older-due 6 months after 1st dose

Rule active

Rule Drug Allergy Triggers Non-Drug Allergy Triggers CPT Satisfiers Result Specialty Info Source

Available to portal

Portal Description: You are due for a second dose of Product X immunization 6 months after the first dose

Gender: All patients Male Female

Minimum Age: 0 0 18

Maximum Age: 0 0 110

User Roles: Providers Clinical staff Non-clinical staff

Rule Reminder: 60 (days before due)

Number of Times: 2 (cumulative number of times the patient needs to have this test done)

Patient Only (Optional): Patie

- Select **CPT Satisfiers** tab, and set the same **CPT code** as the 1st dose **Rule**
- Select **Add**; search for and select the appropriate **CPT code**
- Select **Save** to activate the **Rule**

Rule Name: Product X immunization - 2nd dose due 6 months after 1st dose

Result Description: Product X immunization - 2nd dose - all pts aged 18 and older - due 6 months after

Rule active

Rule Drug Allergy Triggers Non-Drug Allergy Triggers CPT Satisfiers Result Specialty

+ Add - Delete

Code	Description
99999	Product X immunization

Save

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- If a patient is due for an immunization, the **Alert** will be displayed in the **Rules/Reminders** section of the chart
- Because there are two **Rules** being created with the same age criteria, they will both initially display at the same time in the patient chart

Order	Date Last	Due Date	Status	Description
Override	N/A	9/18/2020	Overdue	Product X immunization -1st dose
	N/A	1/18/2021	Overdue	Product X immunization - 2nd dose due 6 months after 1st dose
Run All				
Add Rule				
Source				

- Once the initial dose of Product X is documented, the **Alert** for the 1st dose rule will be satisfied and will no longer display, and only the **Alert** for the 2nd dose will be visible

Order	Date Last	Due Date	Status	Description
Override	9/18/2020	1/28/2021	Overdue	Product X immunization - 2nd dose due 6 months after 1st dose
Run All				
Add Rule				
Source				

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