Electronic Health Record (EHR) Quality Measure Dataflow Tool #2

Creating a CQM Data Documentation Plan for Your Practice

Provided By:

The National Learning Consortium (NLC)

Developed By:

Health Information Technology Research Center (HITRC)

The material in this document was developed by Regional Extension Center staff in the performance of technical support and EHR implementation. The information in this document is not intended to serve as legal advice nor should it substitute for legal counsel. Users are encouraged to seek additional detailed technical guidance to supplement the information contained within. The REC staff developed these materials based on the technology and law that were in place at the time this document was developed. Therefore, advances in technology and/or changes to the law subsequent to that date may not have been incorporated into this material.

NATIONAL LEARNING CONSORTIUM

The National Learning Consortium (NLC) is a virtual and evolving body of knowledge and tools designed to support healthcare providers and health IT professionals working towards the implementation, adoption and meaningful use of certified EHR systems.

The NLC represents the collective EHR implementation experiences and knowledge gained directly from the field of ONC's outreach programs (*REC*, *Beacon*, *State HIE*) and through the *Health Information Technology Research Center (HITRC)* Communities of Practice (CoPs).

The following resource is an example of a tool used in the field today that is recommended by "boots-on-the-ground" professionals for use by others who have made the commitment to implement or upgrade to certified EHR systems.

DESCRIPTION

Dataflow Tool #1 (Understanding CQM Data Documentation in Your Practice) and Dataflow Tool #2 (Creating a CQM Data Documentation Plan for Your Practice) are intended to help providers think about and plan for Clinical Quality Measure (CQM) documentation. This worksheet – for Tool #2 – can help providers develop individual-specific or role-specific plans for training and implementing the appropriate workflow in order to capture the necessary data elements for the CQMs selected. This worksheet is meant to augment, not replace, other planning that the provider might be doing for EHR implementation.

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Date Completed: _____

Using EHR Dataflow Tool #1 as a baseline for individual Clinical Quality Measures (CQMs), use this worksheet to plan how to implement or modify your quality measure data documentation practices across all of your selected CQMs. Use the following steps:

- For each of your practice staff roles identified below, use this form to create a "to-do" list to ensure that each staff member is equipped to accurately document the data elements needed for your selected CQMs.
- Use the CQM Quick Reference Guides for a list of data elements required for each measure.
- Include information on who will use what type of computers, forms, or other devices in what locations in the practice.
- Use this documentation plan to help identify changes that may be needed in the physical layout of your practice to improve quality measure data documentation for your EHR and for your selected CQMs.
- As needed, revise this worksheet by shortening or expanding it for your practice. For example, some types of staff listed below may not be involved in your practice. Or, expand the list of staff by adding more staff types or names of staff members.

List your selected CQMs here:
1) _____
2) _____
3) _____
4) _____
5) _____
6) _____

STAFF QUALITY MEASURE DATA DOCUMENTATION ROLES

Role (e.g., Physician, Physician Assistant, Nurse Practitioner):

Describe computer and EHR experience and training to date, and document any additional training needed: _____

List all of the data elements to be documented, by CQM:

1) _____
2) _____

3) _____
4) _____
5) _____
6) _____

Describe how each of the data elements will be documented, including forms, checklists, computers, terminals, other devices to be used:

Describe the physical location of where the documentation will be done, and document any changes to physical layout of the practice that may be needed:

When documentation of each of the data elements will take place (before, during, or after the patient visit):

Describe any additional issues or opportunities that need to be addressed:

Role (e.g., Registered, Licensed Practical, or Specialized Nurse):

Describe computer and EHR experience and training to date, and document any additional training needed: _____

List all of the data elements to be documented, by CQM:

1) _____
2) _____
3) _____
4) _____
5) _____
6) _____

Describe how each of the data elements will be documented, including forms, checklists, computers, terminals, other devices to be used:

Describe the physical location of where the documentation will be done, and document any changes to physical layout of the practice that may be needed:

When documentation of each of the data elements will take place (before, during, or after the patient visit):

Describe any additional issues or opportunities that need to be addressed:

Role: (e.g., Medical Assistant):

Describe computer and EHR experience and training to date, and document any additional training needed:
_____

List all of the data elements to be documented, by CQM:

1) _____
2) _____
3) _____
4) _____
5) _____
6) _____

Describe how each of the data elements will be documented, including forms, checklists, computers, terminals, other devices to be used:

Describe the physical location of where the documentation will be done, and document any changes to physical layout of the practice that may be needed:

When documentation of each of the data elements will take place (before, during, or after the patient visit):

Describe any additional issues or opportunities that need to be addressed:

Role (e.g., Office Staff, Billing staff):

Describe computer and EHR experience and training to date, and document any additional training needed:

List all of the data elements to be documented, by CQM:

1) _____
2) _____
3) _____
4) _____
5) _____
6) _____

Describe how each of the data elements will be documented, including forms, checklists, computers, terminals, other devices to be used:

Describe the physical location of where the documentation will be done, and document any changes to physical layout of the practice that may be needed:

When documentation of each of the data elements will take place (before, during, or after the patient visit):

Describe any additional issues or opportunities that need to be addressed:

Other Staff, Describe:

_____

Describe computer and EHR experience and training to date, and document any additional training needed:

_____

List all of the data elements to be documented, by CQM:

1) _____
2) _____
3) _____
4) _____
5) _____
6) _____

Describe how each of the data elements will be documented, including forms, checklists, computers, terminals, other devices to be used:

Describe the physical location of where the documentation will be done, and document any changes to physical layout of the practice that may be needed:

When documentation of each of the data elements will take place (before, during, or after the patient visit):

Describe any additional issues or opportunities that need to be addressed:

Source: Adapted from DOQ-IT. "A Systems Approach to Operational Redesign Workbook." MassPro. Web. 27 Mar. 2011. <http://www.masspro.org/docs/tools/DOQIT%20WB%20for%20WEB.pdf>.