

## Pharmacy Diabetes Management Clinic, Version 2.0

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Status

Date Enrolled

MFN

Last Name

First

AIC result

Dec-17

Jan-18

Feb-18

Mar-18

Apr-18

May-18

Jun-18

Jul-18

Aug-18

Sep-18

Oct-18

Nov-18

Dec-18

Jan-19

Feb-19

Mar-19

Apr-19

May-19

Jun-19

Jul-19

Aug-19

Sep-19

Oct-19

Nov-19

Enrolled

2016-05

12341234

HIPAA

HELLO

</

**Purpose:**

- 1) Monitor status of patients whom are currently enrolled with our Diabetes Management clinic.
- 2) Noticeably see gaps with follow-up appointments and HbA1c% tests if patients are overdue.
- 3) Provide metrics to assist with quality assurance and/or improvement projects.
- 4) Microsoft Excel helps automate data entry for convenience. It is recommended to develop your skills with Excel and experiment to improve the spreadsheet as necessary. Before editing the spreadsheet, make a copy to work on and discuss to Sarah about your progress throughout the project.

**For questions or confusion, please feel free to text me (and it's totally okay!). I would do my best to assist you from there! ☺ [Dave Lindqvist (714) 603-4169]**

## **“Active DM Patients” Sheet**

1. This sheet depicts a long-term history with active DM patients since January 2017.
2. For new patients, try to get their HbA1c% 6 months prior to initial referral.
3. Any patients discharged from the DM clinic should be noted within the month they were discharge with “DC” in the cell. The patient will be removed at the start of each new year and moved over to the “Discharged DM Patient” for records.
4. Unfortunately, trying to filter by name or MRN will damage the integrity of the formulas between “Active DM Patients” and the HbA1c% column in the “Sticky Note” sheet. Therefore, please do not filter.
5. If a patient had an in-person encounter (“**Had an Encounter**”) and telephone encounter (“**Virtual Visit**”) in the same month, label that month with the higher priority with the respective color shown in the **KEY**. Priority is in the order of “**Initial Referral**” > “**Had an Encounter**” > “**Virtual Visit**” > “**F/U appt**” (i.e. If there was a “**Had an Encounter**” and “**Virtual Visit**” in the same month, color the cell with “**Had an Encounter**”).

Note: make sure that row alignment stays consistent between sheets (example, pt A in row 24 in sheet 1 also needs to be in row 24 in sheet 2)

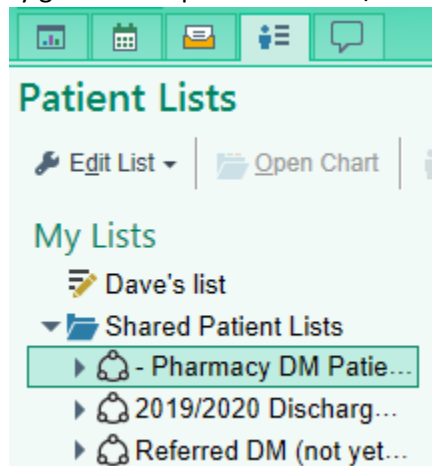
## “Sticky Note Update”

1. This sheet is to help the supervising pharmacist monitor if the patients are officially registered with the DM clinic.
2. Check the “Sticky Note Update” sheet and notice if any cells under column “F/U APPT” are in **red** as this is indicative of a past appointment and patient should have a new appointment set up.

<u>Sticky Note</u>			
<u>Consent</u>	<u>Referral</u>	<u>F/U APPT</u>	<u>Most Recent HbA1c%</u>
	07/11/19	09/09/2019 10:00	8.1
03/25/19	07/01/19	09/17/2019 11:00	9.3
05/04/16	07/01/19	09/16/2019 11:30	9.5
	07/11/19	09/16/2019 11:00	9.2
04/15/19	06/20/19	10/07/2019 10:30	7.7
08/19/19	08/21/19	09/04/2019 16:30	11.8
04/27/15	06/21/19	09/27/2019 15:00	8.0
08/19/19		09/10/2019 10:00	11.9

Ex:

- a. This should be noticeably helpful to see if any patients are not up to date.
- b. Pink blank cells represent that cell is empty and therefore needs to be looked into.
- c. To quickly go over the patient’s next F/U APPT, request from Sarah to provide you with the active DM patients under “Shared Patient Lists”



i.

- d. Once you have the list, find your active DM patient and hover your mouse over the “Next Appt” entry:

refreshed just

Last Office Visit Date	Next Appt	My Sticky Note Text	My Stick Note	Phone
07/15/2...	09/09/2...	—	+	503-
07/09/2...	09/09/2...			404-

Future appointments:  
9/9/2019 at 10:00 AM  
Family Medicine (SMC Anticoagulation/Pharmacy, RN)

- i.  
ii. Update the F/U APPT with the date and time. You can make sure this is the correct appointment by opening up the appointment desk



/(Ctrl+5), and find the patient. Once you have the patient’s profile open, you should see under “Visit Type” with **DIABETIC VISITS** and “Provider” with **SMC CLINICAL PHARMACIST**.

Ex:

Visit Type	Provider
DIABETIC VISITS	SMC CLINICAL PHARMACIST

- e. Some patients will have virtual visits via phone and may not appear in the appointment log within EPIC. It is best to look in the most recent note and update the sheet with the estimated date for follow-up.

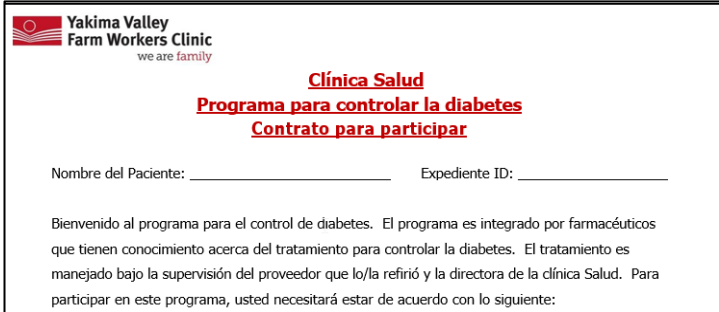
3. Referrals documentations need to be renewed annually and will be shown in red text if it is past due.

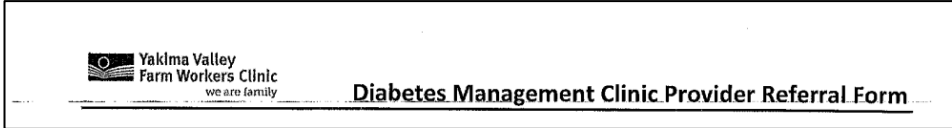
F	G	H	I
		Sticky Note	
Consent	Referral	F/U APPT	Most Recent HbA1c%
	07/11/18	09/25/2019 09:30	8.1
03/25/19	07/01/19	09/17/2019 11:00	9.3
05/04/16	07/01/19	09/16/2019 11:30	9.5
	07/11/19	09/16/2019 11:00	9.2
04/15/19	06/20/19	10/07/2019 10:30	7.7
08/19/19	08/21/19	09/23/2019 17:00	11.8
04/27/15	06/21/19	09/27/2019 15:00	8.0

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Consent	Referral	F/U APPT	Most Recent HbA1c%
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05/04/16	07/01/19	09/16/2019 11:30	9.5
	07/11/19	09/16/2019 11:00	9.2
04/15/19	06/20/19	10/07/2019 10:30	7.7
08/19/19	08/21/19	09/04/2019 16:30	11.8
04/27/15	06/21/19	09/27/2019 15:00	8.0
08/19/19		09/10/2019 10:00	11.9

4.

- a. Pink cells indicate there are no documents signed or appointment made for the patient. Please make the effort to get this done for the DM clinic.
- i. To check if the patient has their documentations done, look within EPIC in the patient's profile under "Chart Review". Click on the "Media" tab and locate for "Consent" or "Referral Documentation". Find the scan and see if the documents match the examples below:

Ex:  (Consent Form)

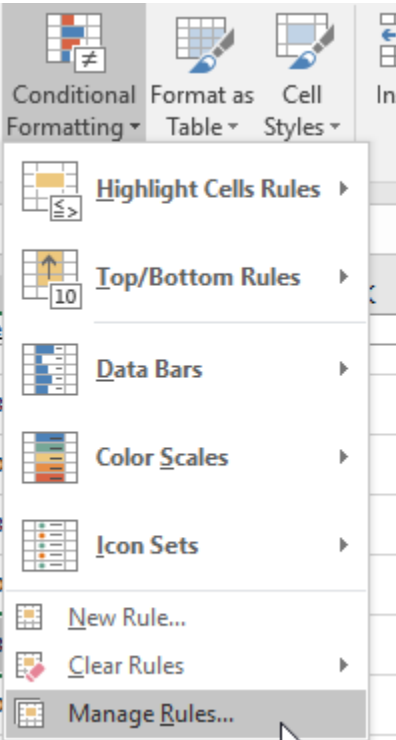
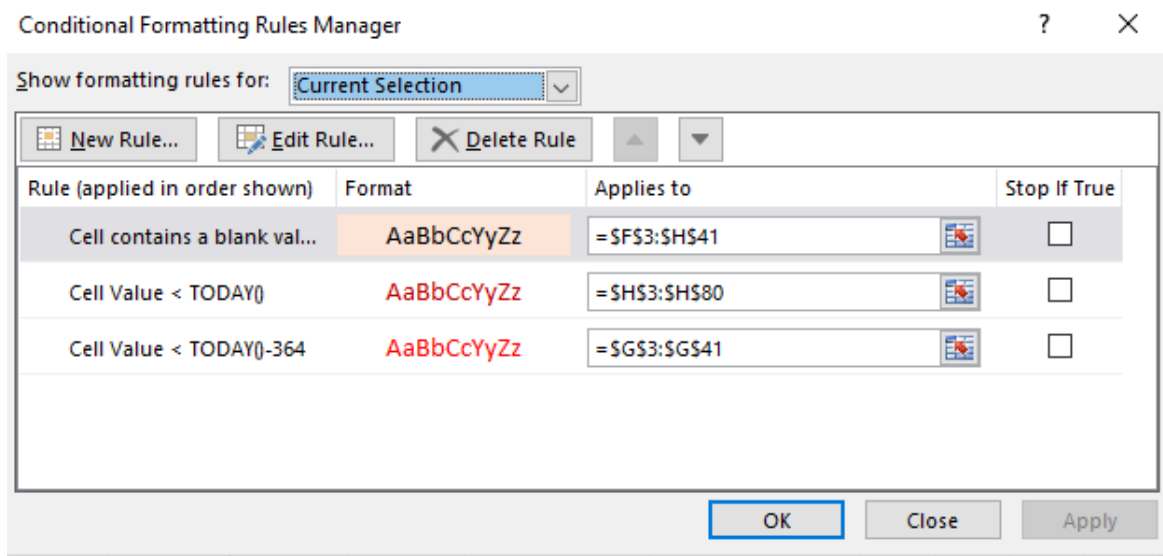
Ex:  (Referral Form – needs to be updated annually)

**\*\*Advice to keep up with consent/referral forms\*\***

- If a patient needs a consent form or referral document, please note it in the progress note for the next pharmacy team member to be aware to bring it up to the patient and/or provider.
- Referrals need to be renewed annually.
- Consent forms need to only be done once.

5. “Most Recent HbA1c%” will update automatically due to the inputted formula that references from the “Active DM Patients”. To understand the formula, it is determining whether the first cell has a number and if it does not, then it will go on to the next cell until one exists.
- Ex: “=IF(T3>0,T3,IF(S3>0,S3,IF(.....)))”
    - If T3 is greater than 0, then it will show the value of T3. However, if T3>0 is NOT met (which means the cell is empty) then it will go onto the next option to see if S3>0. If that is true then it will show the value of S3 and if NOT then R3>0... and so on.

\*\*If you’re wondering about “NAMEOF SHEET!” within the formula, it is referencing a cell from a different sheet (e.g. Cell AP13 within NAMEOF SHEET)\*\*

6.  → 

- Conditional formatting allows the “automation” of formatting the cell without manually editing it.
- The three rules above indicate:
  - Pink cells automatically populate when there’s a blank value (i.e. empty) and applies from row/column F3 to row/column H41
  - Burgundy text automatically populate when column H3 has a cell with a date that is less than TODAY’s date (F/U APPT)
  - Red text automatically populate when column G3 has a cell with a date that is over a year ago (Referral)

### **“Total Visits”**

1. Request from [REDACTED] to print out the monthly compilations of the “pharmacy visits” and “virtual visits”.
2. Since the printout does not distinguish the type of pharmacy visit, you must look into the patient’s profile under “Notes” and discern whether it was a diabetes-related visit. MTMs do not count unless they are a current patient and was for a DM med review.
3. Virtual visits from Lancaster (e.g. [REDACTED]) can be counted if the patient is an active patient within SMC’s diabetic management clinic.
4. Total encounters do not need to be inputted as there is a formula in the cell.
5. In order to find if patient had any hypoglycemic episodes, look within the progress or virtual visit notes. Hypoglycemia episodes are counted only if BG < 70 mg/dL. Patients who treat their hypoglycemia episodes with snacks and feel fine afterwards are considered mild. Severe hypoglycemia (very rare) require medical attention.