

# APPENDIX 1



# CALIFORNIA CORRECTIONAL HEALTH CARE SERVICES



## MEMORANDUM

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**Date** : July 22, 2016

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**To** : All Healthcare Staff

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**From** : California Correctional Health Care Services (CCHCS)

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**Subject** : EHR Medical Scheduling Registry

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As our three pilot institutions transitioned to the new Electronic Health Record System (EHR), institution staff quickly identified a need for scheduling reports that would help care teams track and prioritize queues of pending orders, proactively manage future clinic workload, and identify emerging trends in access to care.

This week, California Correctional Health Care Services (CCHCS) released the EHR Medical Scheduling Registry, a real-time listing of all schedulable orders that can be filtered to show orders by institution or only those relevant to a particular care team. Employing three unique views and advanced filter options, the EHR Medical Scheduling Registry breaks down all schedulable orders in ways currently unavailable within the EHR to provide clinical staff, schedulers and leadership with the ability to easily manipulate and analyze scheduling data.

This new tool allows institution staff to:

- View and prioritize pending orders;
- Clean up queues by identifying incomplete orders that should have been closed out or may no longer be clinically relevant.
- Run real-time scheduling performance reports, with drill-down views by care team, provider type, and specific Dashboard measures.

The Medical Scheduling Registry features three tabs: Future Appointments/Order Queue, Incomplete & Past Compliance, and Scheduling Performance. **Attachment I provides screenshots and detailed description for each of these tabs.** As is consistent across all QM tools, staff using the Medical Scheduling Registry can access the Patient Summary by clicking on a patient's CDCR number; clicking on the patient's last name will bring up a new Scheduling Patient Drill Down.

You can find the EHR Medical Scheduling Registry on the QM Portal under Care Team Tools. As each institution rolls out the EHR, scheduling data will automatically transfer over and begin to populate the registry.

Click the link to view the [Medical Scheduling Registry](#).

It would not have been possible to develop the Scheduling Registry without many hours of dedicated feedback, testing, and validation from subject matter experts at our three EHR pilot institutions, as well as input from headquarters and regional experts on EHR design and scheduling operations.

If you have any questions about how to use the Medical Scheduling Registry, or about the underlying data and report construction, please contact the Quality Management Section via [QMStaff@cdcr.ca.gov](mailto:QMStaff@cdcr.ca.gov).

Thank you for all of your ongoing efforts to improve the quality of services and access to care.

ATTACHMENT I

Detailed Description of 3 Scheduling Registry Tabs

Future Appointments/Order Queue

This view provides real-time data on all scheduled appointments and unscheduled orders for patients in your Institution or Care Team. The graph below shows the total volume of orders (workload) that has been scheduled or still needs to be scheduled on or before the corresponding day. The purpose of this view is to help Institutions and Care Teams better manage their Queue by understanding their entire workload, and helping to inform clinical/scheduling adjustments appointments and orders when necessary. There are also filter options available to view orders by Provider Type (i.e. PCP, PC RN, Specialty, etc.) or by Dashboard Measure (i.e. PCP Routine 14 Day Follow-up, Routine Specialty, etc.).



Incomplete & Past Compliance

This view shows all incomplete orders that have already exceeded their compliance data and have not been rescheduled. Institutions and Care Teams can use this view to clean up their current order backlog by (1) completing orders that were not closed correctly, (2) rescheduling orders that still hold clinical relevance and/or (3) cancelling/discontinuing orders that no longer hold clinical relevance (i.e. the medical staff's reason for placing the order has already been addressed with the patient).

CDCR #	Last Name	Risk Level	Care Team	Order ID	Order Type	Order Name ( Visit Reason )	Compliance Date	Appt. Date	Order Status
		LOW	Facility C		Specialty	Consult to Gynecology ( Depo Provera for menorrhagia Las Depo 10/21/15 )	01/21/15		547 Days Overdue
		HIGH 1	Facility B		Specialty	Request Referral to Ophthalmology ( paper )	01/27/15		541 Days Overdue
		MED	Facility C		Specialty	Consult to Optometry	03/31/15	01/15/16	478 Days Overdue

**ATTACHMENT I**

**Detailed Description of 3 Scheduling Registry Tabs**

**Scheduling Performance**

This view shows all orders that were completed, cancelled/discontinued or are incomplete and became past due during the time period of your choosing. This gives Institutions and Care Teams the ability to track their performance over time and hone-in on processes and workflows that could be modified to improve patient access to timely care and/or overall data quality. Just like the other views, there is the option to drill down on specific Care Teams, Provider Types, and Dashboard Measures.

Future Appointments/Order Queue		Incomplete & Past Compliance		Scheduling Performance		
Orders	Total	Completed By Compliance Date	Completed After Compliance Date	Incomplete Past Compliance Date	Canceled After Compliance Date	Canceled Before Compliance Date
Total Orders	6021	3481	501	1286	285	468
Percent	100%	58%	8%	21%	5%	8%

  

CDCR #	Last Name	Risk Level	Care Team	Order ID	Order Type	Order Name ( Visit Reason )	Comp. Status	Compliance Date	Date Completed	Order Status
		HIGH 2	Facility D		PCP	Medical Chronic Care (CCP) Follow Up 20 ( 90 day follow for tension, GERD, HCV, )	Yes	07/21/16	07/20/16	Completed
		HIGH 1	Facility D		Radiology	CT HIP LEFT W/ CTRST	N/A	07/21/16		Discontinued ( Exam Replaced )
		HIGH 1	Facility D		Radiology	CTA EXTREMITY LOWER LEFT W/ CTRST	N/A	07/21/16		Canceled ( Wrong Encounter )

**PATIENT DRILLDOWN**

The Scheduling Registry Patient Drilldown will show all schedulable orders that have been entered into PowerChart for each individual patient, regardless of order status (i.e. ordered, completed, and cancelled/discontinued).

CDCR #	Last Name	First Name	DOB	Risk Level	Institution	Care Team	Cell Bed
				HIGH 2		Facility D	

  

Order ID	Order Type	Order Name ( Visit Reason )	Compliance Date	Date Completed	Order Status	Appointment Date
	RN	7362 RN Initial Visit ( RN initial visit )	12/10/15	12/10/15	Completed	12/10/15
	RN	7362 RN Initial Visit ( PAIN CARPAL TUNNEL )	01/04/16	01/04/16	Completed	01/04/16
	PCP	Medical Chronic Care (CCP) Follow Up 40 ( CCP )	01/19/16	02/03/16	Completed	02/03/16