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# Accuro EMR Guide for Reducing the Impact of Financial Strain

Reviewed in 2019



## ACTT

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# Panel Segmentation & Marking the Record

Establishing and maintaining an accurate panel is a critical step to leveraging the EMR for managing patient care. Please refer to the Panel Identification and Panel Maintenance sections of [Accuro EMR Resource for Patient’s Medical Home](#) and other Accuro EMR resources as needed.

Managing a patient panel to reduce harms associated with experiencing financial strain begins with the identification of patients who are experiencing financial strain. The process of identifying a sub-group of patients within the panel is panel segmentation. Marking the patient record identifies the panel segment by using a standardized term to facilitate the use of searches and applicable point-of-care reminders.

The panel segment of interest for this population is **patients who are experiencing financial strain**. This panel segment includes all patients who respond “Yes” to the screening question “Do you ever have difficulty making ends meet at the end of the month?” This is the recommended standardized RIFS screening question but clinic teams may choose to ask patients additional screening questions at their own discretion.

Identifying and maintaining a list of patients who are experiencing financial strain requires an active screening process and review to ensure accuracy of information. The next three sections will provide recommendations for developing a screening process. As you read through these sections, please keep in mind that there are several methods to facilitate the development of a panel segment patient list. Clinic teams are, therefore, encouraged to consider their clinic’s context and explore other methods as appropriate.

## Identifying the Screening Patient Population

**Recommended method:** Start by identifying the patient population the clinic team would like to screen for patients experiencing financial strain. Here are some examples:

All patients 18 years and older:

- who have never been screened for experiencing financial strain.
- participating in a particular initiative like Patients Collaborating with Teams (PaCT).
- with a specific complex health need (e.g. patients with multiple chronic conditions, patients taking multiple medications). Please refer to the [Accuro EMR Resource for Patient’s Medical Home](#) document for additional information about identifying patients with complex health needs.
- who have an appointment with a specific physician or other healthcare provider.

Once the screening patient population has been identified, it is suggested that the clinic team create **point of care reminders** to flag patients who should be offered the screening question. Point of care reminders can be used to remind clinic staff to perform a certain action when a patient visits the clinic.

**TIP:** Experiencing financial strain is a common occurrence for many people. We want to normalize the screening process as much as possible, so patients don’t feel like their selection was targeted. This could make them feel even more shame and stigma for experiencing financial strain.

*Global Visit Reminders/Alerts* – Global reminders for patient recall/outreach can be used to flag patients who meet the criteria of the screening population. For example, below is a screenshot of a query that can be used as an alert to flag Dr. Brown’s adult patients who have an appointment booked “today” and have never completed a screening questionnaire. If your clinic is concerned that adding RIFS patient alerts will impact patient confidentiality or clutter patient charts, consider running this query every morning to identify patients due for screening.

```
Family Phys. = 'Brown, Billy'
Status = 'New Patient' OR Contains 'Active'
Age Between 18 Years and 200 Years
Appointment Date In the Next Now
Social History History Contains 'RIFS Declined' OR Contains 'RIFS Negative' OR Contains 'RIFS Positive' OR Contains 'RIFS UTC'
```

Note that it is important to check off “Doesn’t Match” when adding the query criteria identifying patients who have been offered the screening question. This will highlight the row in the query in red and ensure that only patients who have never been offered the screening question are flagged for screening (in the example query above, the row highlighted in red indicates that patients with a RIFS result in their “Social History” band will be excluded from the query). It is also important to include all active patient statuses in the search (see the “Status” line in the above query). This will ensure that all active patients are included in the query.

## Screening Patients

**Recommended method:** Work as a clinic team to determine how the screening question will be offered to and completed by patients.

1. Consider using the using the RIFS scripting samples when **offering the screening question to patients.**
2. Consider using one or more of the following methods to **administer the screening question:**
  - i. Create the screening question as a document and print it out for patients to complete with a pen or pencil. See these useful resources for additional information on printing and filing documents from the EMR:
    - ACTT Online Resources:
      - Accuro EMR Guide for Patient's Medical Home (see page 38)
    - Accuro EMR Help Files:
      - Print a Document in Documents
      - File a Document

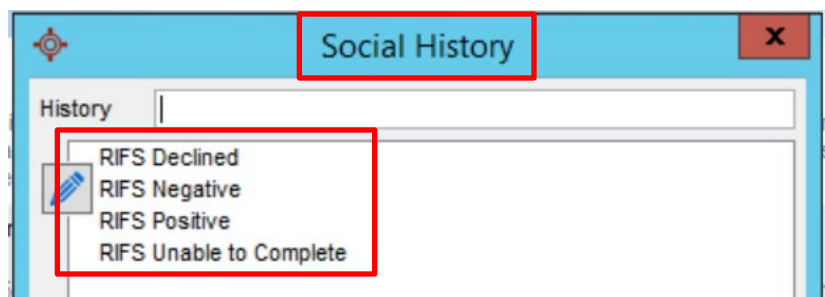
- ii. Provide patients with a laminated copy of the screening question to be completed with a whiteboard marker.
- iii. Have a clinic team member complete the screening question with the patient and record the response directly in the EMR. See the [Reviewing and Recording the Screening Question Result](#) section below for more information about where the result can be recorded.

**TIP:** When considering how the screening question will be administered, please keep in mind that personal finance is a sensitive topic for many patients. The screening process should therefore ensure that patient privacy and confidentiality are maximized. For example, consider offering patients the screening question while in a private exam room.

# Reviewing and Recording the Screening Question Result

**Recommended method:** A healthcare provider reviews the screening question result with the patient and records the result in the EMR.

1. Consider using the RIFS scripting samples to guide providers with their **conversations when responding to patients** after the screening has been completed.
2. Recording the screening question result
  - a. Consider recording the following four types of question results in a searchable field in the EMR (see step 2b below):
    - i. Positive: patient responds “Yes” to the question “Do you ever have difficulty making ends meet at the end of the month?”
    - ii. Negative: patient responds “No” to the question “Do you ever have difficulty making ends meet at the end of the month?”
    - iii. Unable to Complete: patient is unable to complete the screening question (e.g. due to illiteracy, a language barrier, a mental health barrier such as dementia, etc.). Please note that, to make the screening process more efficient, this result can be recorded in the EMR by the clinic staff member who offers the patient the screening tool.
    - iv. Declined: patient declines to complete the screening question. Please note that, to make the screening process more efficient, this result can be recorded in the EMR by the clinic staff member who offers the patient the screening tool.
  - b. Consider recording the four types of screening question results in one of the following searchable fields in the EMR:
    - i. *Medical History Band*: record the screening question result in the most appropriate Medical History Band given your clinic’s context. This may mean using an existing Medical History Band or creating a completely new one. In the below example, the “Social History” Medical History Band is used to record RIFS screening question result. Once the Medical History Band has been chosen, create fixed RIFS fields for each of the four types of screening results.



When adding a new RIFS screening result, ensure that the following steps are completed:

1. Click on the appropriate screening result
2. Select the "Date" the screening question was offered.
3. Fill out any other relevant information and click "Save and Close".

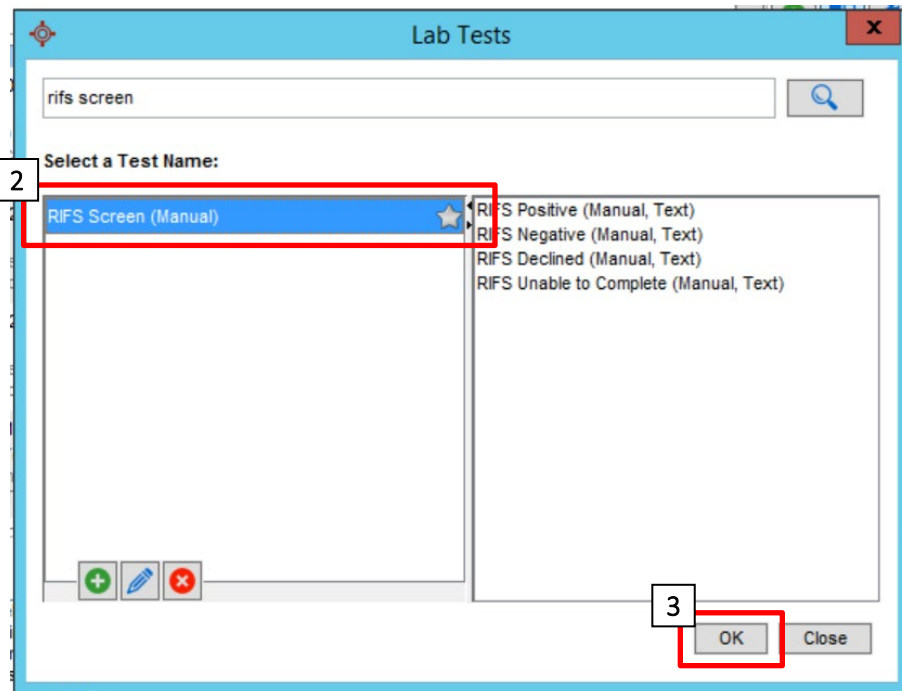
The screenshot shows a 'Social History' form with the following fields and callouts:

- History:** A dropdown menu with options: RIFS Declined, RIFS Negative, RIFS Positive (highlighted with a blue bar and a red box labeled '1'), and RIFS Unable to Complete.
- Details:** A dropdown menu.
- Note:** A text input field.
- Date:** A date field containing '04/16/2020' with a calendar icon, highlighted with a red box and labeled '2'.
- End Date:** A date field with the placeholder 'MM/DD/YYYY'.
- Status:** A date field with the placeholder 'MM/DD/YYYY', a calendar icon, and a dropdown menu set to '--None--'.
- Life Stage:** A dropdown menu set to 'Adult: 18 years or older'.
- Negative:** An unchecked checkbox.
- Buttons:** 'Delete', 'Save and New', 'Save and Close' (highlighted with a red box and labeled '3'), and 'Cancel'.

- ii. *Manual Lab Results*: the manual lab entry must be configured first to appear as an option in the labs section of the EMR (see screen shot below).

Once configured, follow these steps to add a new result:

1. Go to the patient's EMR > Click the + in the Labs section
2. Select the appropriate Test Name (e.g. "RIFS Screen (Manual)")
3. Click "OK".



In the new window that pops up:

4. Ensure that the "Collection Date" and "Time", "Observation Date" and "Time", and "Received Date" all reflect the date and time the screening question was offered.
5. Double-click in "Value" column of the appropriate "Result Name" and type "Yes" or "+".

6. Select the appropriate family physician from the drop-down menu under the “Notes” section > Enter “Notes” if applicable > Click “Apply” or “OK”.

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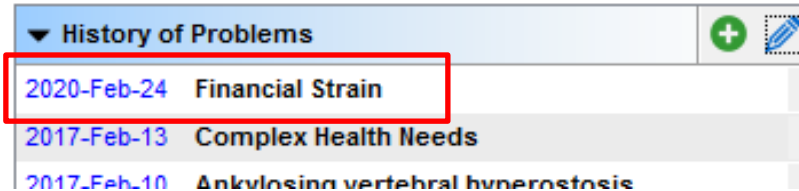
5

6

Result Name	Value	Ref. Range	Units	Flag	Show All	Note
RIFS Positive				Normal	...	
RIFS Negative				Normal	...	
RIFS Declined				Normal	...	
RIFS Unable to Complete				Normal	...	

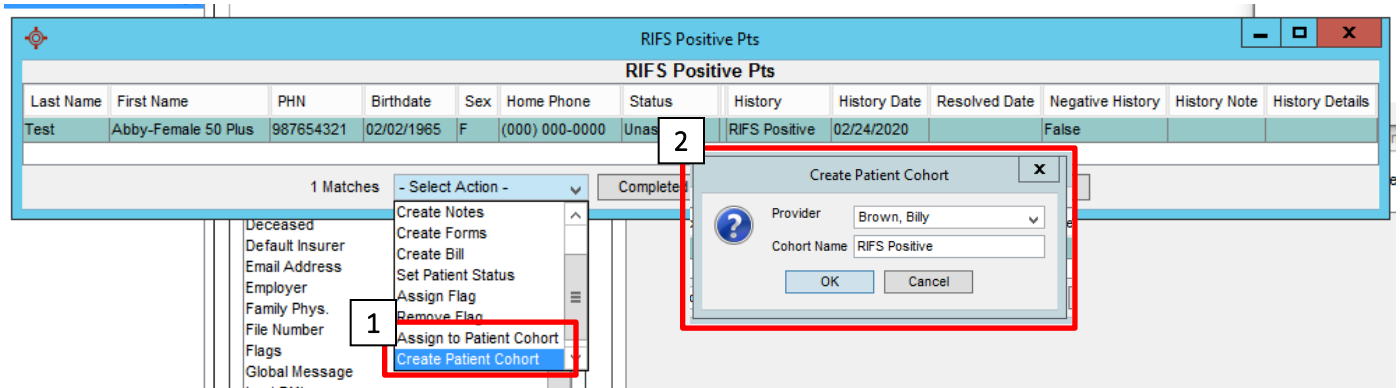


- It is recommended that the healthcare provider record 'Financial Strain' in the patient's "History of Problems" Medical History Band if the result is positive (i.e. patient responds "Yes" to the question "Do you ever have difficulty making ends meet at the end of the month?"). This will allow the clinic to follow-up as appropriate with patients who are experiencing financial strain. Once added to the "History of Problems" Medical History Band, "Financial Strain" will appear in the patient's chart as shown below.



*Cohorts*

In addition to adding 'Financial Strain' to the history of problems, create a Cohort using the 'Cohort' feature. See the Accuro EMR Help File Cohorts, for additional information. Once the search is displayed, select the action 'Create Patient Cohort' (if this is the initial list) or 'Assign to Patient Cohort' (if you are adding patients to the Cohort at a later time).



Once a cohort has been created, this population of patients can be managed with the help of that feature. They are provider specific and cohorts can be added to a query as either an inclusion or exclusion rule. Cohorts can be added to a query in the query builder by selecting "Patient Cohorts" under the Demographics rule category.

# Care Management

The following section outlines some follow-up processes and EMR reminders that can be enabled but this does not replace clinical judgement or consideration of individual patient circumstances. It is intended to provide a ‘safety net’ to alert the clinic team to considerations in managing patients who are experiencing financial strain.

## Referral Coordination

**Recommended method:** A healthcare provider asks patients who are experiencing financial strain if they would like to be referred to another healthcare provider (e.g. social worker) and/or community resource to further discuss their options.

Consider recording the following outcomes of the referral offer:

- i. Accepted: patient accepts the offer for additional resources.
- ii. Declined: patient declines the offer for additional resources.
- iii. Deferred: patient is considering the offer for additional resources but has not yet accepted.

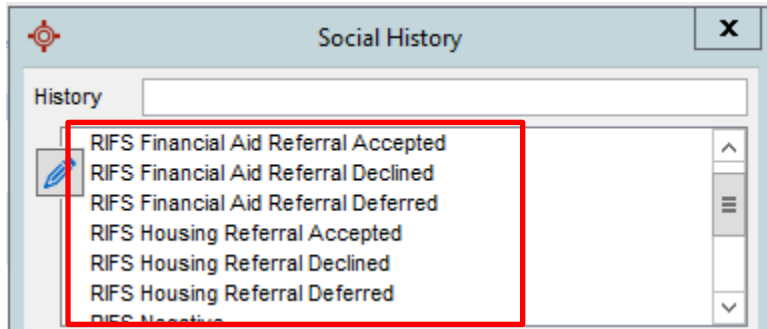
If a patient agrees to be referred to additional resources, consider providing them with a referral to the appropriate healthcare provider and/or a handout of available community supports.

If a patient declines the offer for additional resources, the clinic team can use their best judgement to determine whether or not to reoffer additional resources the next time the patient visits the clinic.

If a patient defers the offer for additional resources, the clinic team can create a reminder to reoffer additional resources the next time the patient calls and/or visits the clinic.

Consider recording the three types of referral outcomes in one of the following searchable fields in the EMR:

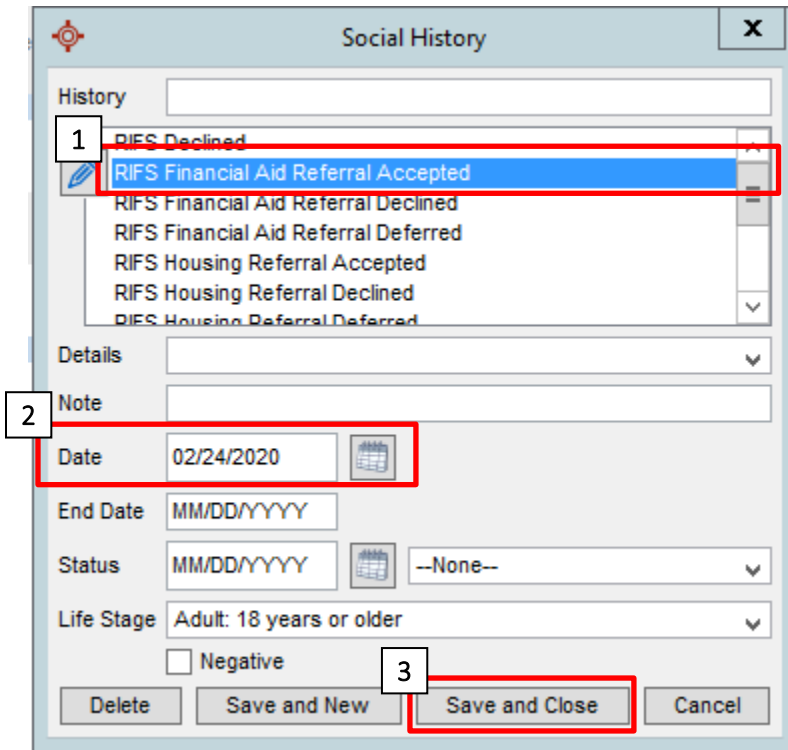
- i. *Medical History Band*: record the referral outcome in the most appropriate Medical History Band given your clinic’s context. This may mean using an existing Medical History Band or creating a completely new one. In the below example, the “Social History” Medical History Band is used to record RIFS referral outcome. Once the Medical History Band has been chosen, create fixed fields for each type of referral and referral outcome your clinic has chosen to track.



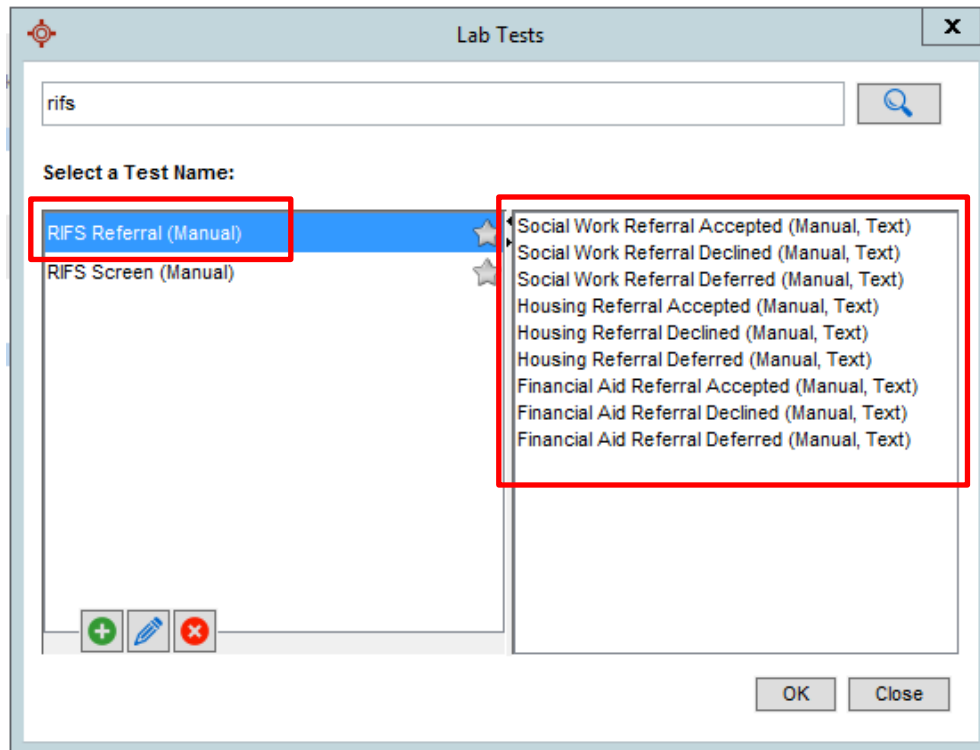
Note that, in the above example, separate fields have been created for each type of referral offered. Your clinic team may instead chose to track overall referral outcomes and only create the following three fields: “RIFS Referral Accepted”, “RIFS Referral Declined”, and “RIFS Referral Deferred”.

When adding a new RIFS referral outcome, ensure that the following steps are completed:

1. Click on the appropriate referral result
2. Select the “Date” the referral was offered.
3. Fill out any other relevant information and click “Save and Close”.

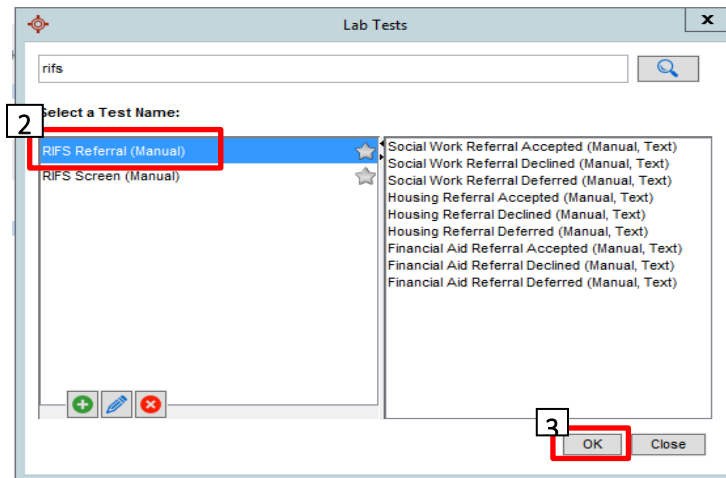


- ii. *Manual Lab Results*: the manual lab entry must be configured first to appear as an option in the labs section of the EMR. The screen shot below shows how the new test can be configured if your clinic would like to track referral outcomes by type of referral.



Once configured, follow these steps to add a new result:

1. Go to the patient’s EMR > Click the + in the Labs section
2. Select the appropriate Test Name (e.g. “RIFS Referral (Manual)”)
3. Click “OK”.



In the new window that pops up:

4. Ensure that the “Collection Date” and “Time”, “Observation Date” and “Time”, and “Received Date” all reflect the date and time the referral was offered.
5. Double-click in “Value” column of the appropriate “Result Name” and type “Yes” (if applicable, repeat for all referral types that were offered).
6. Select the appropriate family physician from the drop-down menu under the “Notes” section > Enter “Notes” if applicable > Click “Apply” or “OK”.

Lab Results Entry - Test, Abby-Female 50 Plus

Source: Manual Entry

**4** Collection Date: 02/24/2020 Time: 11:39 AM Observation Date: 02/24/2020 Time: 11:39 AM  
 Lab Order #: Received Date: 02/24/2020

Laboratory: Requisition Date: MM/DD/YYYY

**5**

Result Name	Ref. Range	Units	Flag	Show All	Note
Social Work Referral Accepted			Normal	...	
Social Work Referral Declined			Normal	...	
Social Work Referral Deferred	Yes		Normal	...	
Housing Referral Accepted	Yes		Normal	...	
Housing Referral Declined			Normal	...	
Housing Referral Deferred			Normal	...	
Financial Aid Referral Accepted			Normal	...	
Financial Aid Referral Declined	Yes		Normal	...	
Financial Aid Referral Deferred			Normal	...	

**6** Notes: Brown, Billy

Send to Provider  Reviewed  Contact Patient

Apply OK Cancel

**TIP:** It is important to ensure that clinic team members record information in the EMR in a standardized way. For guidance on standardizing data entry in the EMR, please refer to pages 5 and 6 of the Accuro EMR Guide for Patient’s Medical Home document.

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## Opportunistic and Outreach Screening - Following Up with Patients Experiencing Financial Strain

Establishing EMR reminders can support the clinic team by identifying tasks that may be appropriate to be completed during a patient encounter (i.e. opportunistically) or a recommendation to reach out to a patient (i.e. outreach). Please see the page 14 of the [Accuro EMR Guide for Patient's Medical Home](#) document for additional information about opportunistic and outreach screening.

It is recommended that the clinic team **establish reminders** to follow-up with patients, as follows, based on the patient's last screening result:

- i. Positive: follow-up at every patient encounter until the patient no longer screens positive, or as appropriate given a specific patient's context
- ii. Negative: follow-up every 18 months, or as appropriate given a specific patient's context
- iii. Unable To Complete: follow-up at every patient encounter until the patient is able to complete the questionnaire, or as appropriate given a specific patient's context
- iv. Declined: follow-up every 18 months, or as appropriate given a specific patient's context

## Opportunistic Care

Consider using one or more of the following options to flag patients who come to the clinic for an appointment and have 'Financial Strain' in their "History of Problems" medical history band.

1. Create a global reminder to flag patients who come in for an appointment, have 'Financial Strain' in their problem list/profile and have not had their screening result reviewed in more than six months. Note that clinic teams are encouraged to choose the screening time interval that makes the most sense given their context (e.g. review positive screening results every three months).

Below are two example queries. Refer to the first one if your clinic team records the screening result in a medical history band. Refer to the second one if your clinic team records the screening result as a manual lab result.

```

Family Phys. = 'Brown, Billy'
Status Contains 'New Patient' OR Contains 'Active'
Age Between 18 Years and 200 Years
Appointment Date In the Next Now
Diagnosis = 'FS' AND Diagnosis Status = 'Active'
Social History History Contains 'RIFS Positive' OR Contains 'RIFS Negative' OR Contains 'RIFS Declined' OR Contains 'RIFS Unable to Complete' AND
  
```

**Example Search 1 - Patients who are Experiencing Financial Strain and are due for a Follow-Up**  
 Use if using Medical History Band to Record Screening Result

```

Family Phys. = 'Brown, Billy'
Status Contains 'New Patient' OR Contains 'Active'
Age Between 18 Years and 200 Years
Appointment Date In the Next Now
Diagnosis = 'FS' AND Diagnosis Status = 'Active'
Lab Type = 'RIFS Positive' OR Contains 'RIFS Negative' OR Contains 'RIFS Declined' OR Contains 'RIFS Unable to Complete' AND Observation Date In the
  
```

**Example Search 2 - Patients who are Experiencing Financial Strain and are due for a Follow-Up**  
 Use if using Manual Lab Results to Record Screening Result

Note that it is important to check off "Doesn't Match" when adding the search criteria identifying patients who have been offered the screening question in the last six months. This will highlight the row in the query in red and ensure that only patients who have not been offered the screening question in the last six months are flagged for screening (in the screen shot below, the row highlighted in red indicates that patients with a RIFS result in their "Social History" band with a date in the last six months will be excluded from the query). It is also important to include all active patient statuses in the search (see the "Status" line in the below query). This will ensure that all active patients are included in the query. Lastly, it is important to include "Diagnosis Status =



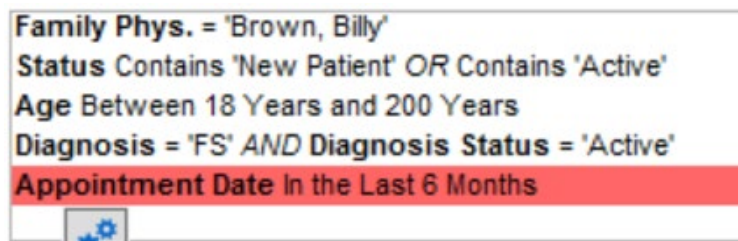
‘Active’ in the “Diagnosis” section of the query (see the fifth row in the example queries). This ensures that only patients currently experiencing financial strain are flagged for follow-up.

2. Create individualized patient reminders to flag patients who come in for an appointment, have ‘Financial Strain’ in their problem list/profile and require an individualized follow-up plan. See the following Accuro EMR Help Files for additional information on creating and managing individual patient reminders:
  - Tasks
  - Patient Tasks (F7)
  - **Query Builder (Alerts)**
  - Alert Definition Publisher
  - Alerts Tab

## Outreach Care

Consider using the following options to flag patients who have ‘Financial Strain’ in their “History of Problems” medical history band and have not come to the clinic for an appointment in more than six months. Note that clinic teams are encouraged to choose the screening time interval that makes the most sense given their context.

1. Create a global reminder to flag patients who have ‘Financial Strain’ in their “History of Problems” medical history band and have not visited the clinic in more than six months.



2. Create individualized patient reminders to flag patients who have ‘Financial Strain’ in their “History of Problems” medical history band and have not visited the clinic as outlined in their individualized follow-up plan. See the following Accuro EMR Help Files for additional information on creating and managing individual patient reminders:
  - Tasks
  - Patient Tasks (F7)
  - **Query Builder (Alerts)**
  - Alert Definition Publisher
  - Alerts Tab

A list of patients requiring outreach care can be printed off as a report and used to call patients to book a follow-up appointment. This creates a ‘safety net’ for follow up on the patient’s financial strain goals or an opportunity to remove ‘Financial Strain’ from the patient’s “History of Problems”.

# Quality Improvement and Measurement

Quality improvement (QI) is a systematic approach to monitoring practice efforts, reviewing and reflecting on the current state and looking for opportunities to improve. Measurement can be a way to monitor clinic operations and improvement. How and why the team uses measurement may require a discussion with the clinic team and practice facilitator. Consider the reason for measurement; is it a spot check or long term monitoring? A team can benefit from reflecting on data produced from the EMR to help inform next steps, focused follow-up or ongoing patient monitoring.

The following examples are queries that a team may wish to perform in their EMR for their patients who are experiencing financial strain:

```
Family Phys. = 'Brown, Billy'
Status Contains 'New Patient' OR Contains 'Active'
Age Between 18 Years and 200 Years
Diagnosis = 'FS' AND Diagnosis Status = 'Active'
```

- Number of active patients experiencing financial strain
- The number of active patients who have been screened for financial strain  
*Note that the below example is for clinics recording the screening result in a Medical History Band. If your clinic team records the screening result in a different EMR field, please include that field in the search instead of the "Social History" section in the search below.*

```
Family Phys. = 'Brown, Billy'
Status = 'New Patient' OR Contains 'Active'
Age Between 18 Years and 200 Years 1 Month
Social History History Contains 'RIFS Declined' OR Contains 'RIFS Negative' OR Contains 'RIFS Positive' OR Contains 'RIFS Unable to Complete'
```

- Number of patients experiencing financial strain who have been offered a RIFS referral  
*Note that the below example is for clinics recording the referral outcome as a manual lab result. If your clinic team records the referral outcome in a different EMR field, please include that field in the search instead of the “Lab Type” section in the search below. Also note that, if your clinic is recording referral outcomes by type of outcome, each type of referral needs to be added to the search.*

Family Phys. = 'Brown, Billy'  
 Status Contains 'New Patient' OR Contains 'Active'  
 Age Between 18 Years and 200 Years  
 Diagnosis = 'FS' AND Diagnosis Status = 'Active'  
 Lab Type = 'RIFS Referral Accepted' OR Contains 'RIFS Referral Declined' OR Contains 'RIFS Referral Deferred' AND Only Check Latest Result AND Include Reviewed Labs

- Number of active patients who are experiencing financial strain and have accepted a referral ex. a social worker referral  
*Note that the below example is for clinics recording the referral outcome in a Medical History Band. If your clinic team records the referral outcome in a different EMR field, please include that field in the search instead of the “Social History” section in the search below.*

Family Phys. = 'Brown, Billy'  
 Status Contains 'New Patient' OR Contains 'Active'  
 Age Between 18 Years and 200 Years  
 Diagnosis = 'FS' AND Diagnosis Status = 'Active'  
 Social History History = 'RIFS Social Worker Referral Accepted'

Decide what measures are meaningful to the team. Keep it simple by choosing 1 or 2 measures at the start and then add and remove measures as the work evolves over time.

**TIP:** Were some queries unable to be performed because the data was not standardized in the EMR?

- Promote discussion at the outset to avoid standardization challenges rather than having to clean them up later.
- Discuss as a team what documentation/charting may need to change moving forward for the purpose of patient population monitoring and process improvement.