
Med Access EMR Guide for Reducing the Impact of Financial Strain

Reviewed in 2020



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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 Guiding Principles to Effective Use of EMR for Patient’s Medical Home Work and other Med Access 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 pages 29 and 30 of the Guiding Principles to Effective Use of EMR for Patient’s Medical Home Work 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.

Global Visit Reminders – 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. Topps’ adult patients who have an appointment booked “today” and have never completed a screening questionnaire. If your clinic is concerned that adding RIFS patient flags will impact patient confidentiality or clutter patient charts, consider running this report every morning to identify patients due for screening.

The screenshot shows a query builder interface with the following sections:

- Criteria**: Includes a template dropdown set to "RIFS Patients Due fi" and an "Unmask" toggle.
- Demographics**: Includes dropdowns for Status (Active), Primary Provider (Topps, David A.), and an Age Range field (18 to).
- Profile**: Includes a dropdown for Category (Social Hx) and a Description field (RIFS). A checkbox labeled "not" is checked and highlighted with a red box.
- Visits**: Includes a plus sign to expand.
- Task**: Includes a plus sign to expand.
- Observation**: Includes a plus sign to expand.
- Medications**: Includes a plus sign to expand.
- Allergy**: Includes a plus sign to expand.
- Goals**: Includes a plus sign to expand.
- Billing**: Includes a plus sign to expand.
- Appointment**: Includes a plus sign, a minus sign, and a checkbox labeled "not". The Date field is set to "25-Feb-2020" to "25-Feb-2020" and is highlighted with a red box.

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.

Note that it is important to check off “not” when adding the query criteria identifying patients who have been offered the screening question. This will ensure that only patients who have not been offered the screening question are flagged for screening. It is also important to ensure that the “Date” selected in the “Appointment” section of the search is set to the desired date.

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 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:
 - 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 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 as an observation that can be added to patient profiles.













Start by creating a new “RIFS Screen” observation type:



- Users with administrative access can click “Templates”  to go to the “Template Management” module
- From there click the “Obs” tab 
- In the “Obs” area click “Types”  and then click “Lists” 
- Click “Manage” 

- Type "Pos, Neg, Unable to Complete, Declined" in the "Description" field and click "add" 


Managed Lists Management Return Help


Table: Managed Lists  Description
Pos, Neg, Unable to Cor  Use Privilege: Public Edit Privilege: Public

Name	Active	Sort			
(0) - (3):20150126133800	<input checked="" type="checkbox"/>	0			
(0) - (4):20150126133759	<input checked="" type="checkbox"/>	0			
(1) to (5):20130327165819	<input checked="" type="checkbox"/>	0			
(1) to (5):20130530163819	<input checked="" type="checkbox"/>	0			

- Click "Return" 
- Search for your new list by name and click Edit Managed List 

Managed Lists Return Observation Types Manage Help


Name: pos, neg, un  Domain: Local Lists

Managed List Pos, Neg, Unable to Complete, Declined	
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- Type "Positive" in the "Description" field and click "Add" 

Pos, Neg, Unable to Complete, Declined Dropdown Management

Return Help

Table: Pos, Neg, Unable to Complete, Declined Dropdown Description
Positive Code:  Use Privilege: Public Edit Privilege: Public

No results found using the specified criteria.





- Repeat for “Negative”, “Unable to Complete”, and “Declined”. Also ensure the “Sort” numbers are such that the list sorts in the order shown below

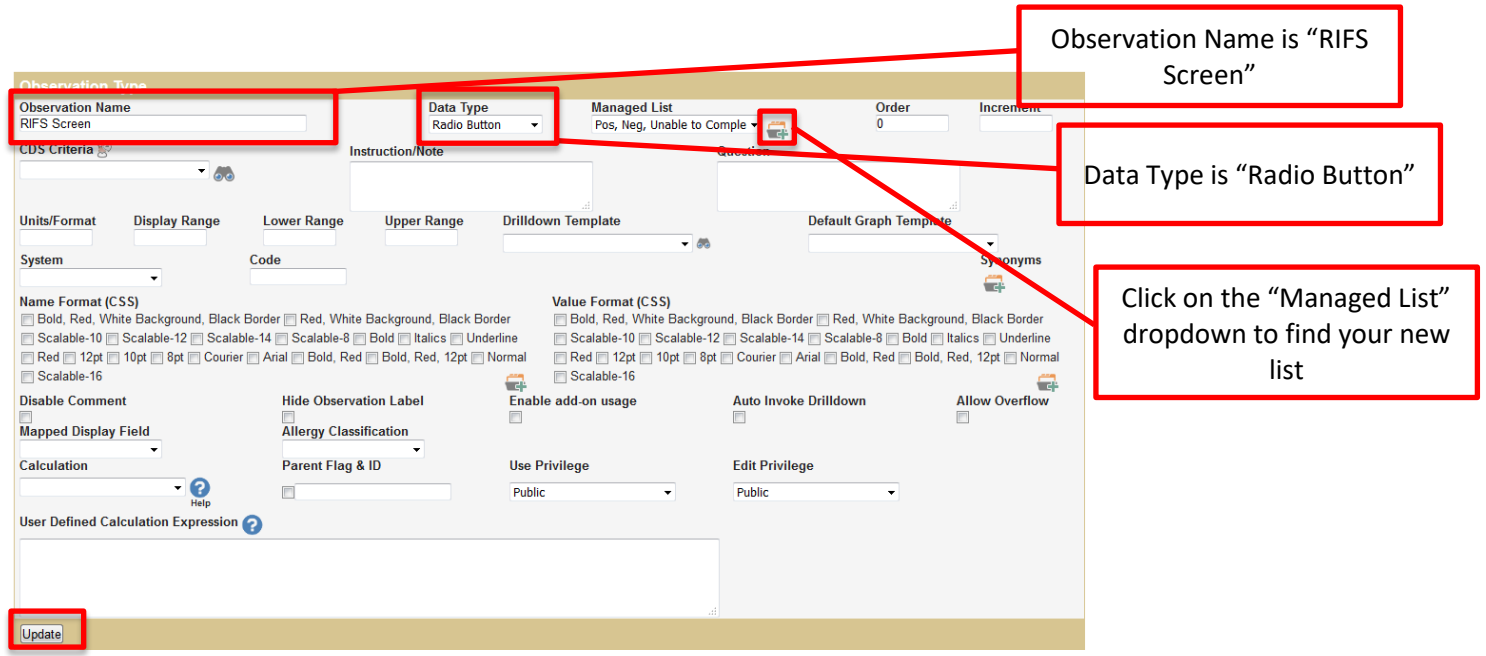
Pos, Neg, Unable to Complete, Declined Dropdown Management

Return Help

Name	Code	Active	Sort	Use Privilege	Edit Privilege
Positive	1204520	<input checked="" type="checkbox"/>	0	Public	Public
Negative	1204521	<input checked="" type="checkbox"/>	1	Public	Public
Unable to Complete	1204522	<input checked="" type="checkbox"/>	2	Public	Public
Declined	1204523	<input checked="" type="checkbox"/>	3	Public	Public

Export options: Excel | PDF | RTF

- Click “Return” 
- Click “Return to Observation Types”  **Observation Types**
- Now create a new observation: in the “Obs” tab , click “New” 



Observation Name is “RIFS Screen”

Data Type is “Radio Button”

Click on the “Managed List” dropdown to find your new list

Update

- Once the three fields in the above screen shot are populated, click “Update” to save your new observation
- The new observation type is now ready to use to add the screening question result to patient profiles and visits

- To add a new RIFS screen result to the patient profile:

The screenshot shows the ACTT interface with three tabs: Labs, Invest, and Consults. Below the tabs is a search bar and a 'Status: All' dropdown. A table lists various RIFS screens with columns for 'Reason' and 'Recur'. To the right is a 'Profile' sidebar menu with options like Preferences, Care Plan, Medical, Psychiatric, Surgical Hx, Concerns, Developmental, Family Hx, Lifestyle, Obstetric, and Social Hx. The 'Social Hx' option is highlighted with a red box.

	Reason	Recur			
List		none			
List		none			
List		none			
Patient Count (pdf)		none			
gram - 10 year Groups		none			
m - 10 year Groups		none			
m - 10 year Groups		none			
n - 10 year Groups		none			
am - 10 year Groups		none			
istogram - 10 year Groups		none			
gram - 10 year Groups		none			
appt day - Insurer Invoice		none			
opt today - Insurer Invoice		none			

- Click on the "Menu" in the "Profile" section of the patient's chart, then click "Social Hx"

The screenshot shows the 'Observations' form in the ACTT interface. The form includes fields for Category (Social Hx), Type, Description, Onset Date, Status (Current), Reported Date (13-Mar-2020), Confirmation Status (Confirmed), Risk Factor (checked), and Confidential (unchecked). A 'Notes' field is also present. To the right is a sidebar menu with options like Find Observation Template, Add Observation, Add CC, Remove Empty Observations, Edit Observation Template, and Help. The 'Add Observation' option is highlighted with a red box.

- Type “RIFS” in the Description field and click the binoculars icon or “Enter” on your keyboard.
- Click on the “RIFS Screen” observation type from the list that appears. *Note*

Observation Types Management

Table: Observation Types | Description: rifs | Code: | Use Privilege: Public | Edit Privilege: Public

Name	Code	Select	Use Privilege	Edit Privilege
RIFS Referral				
RIFS Screen				

Export options: Excel | PDF | RTF

that you will not have to complete this step if the “RIFS Screen” observation is the only observation type with the word “RIFS” in the title. Instead, the observation type will automatically be selected and added to the profile.

- Once the “RIFS Screen” observation is added, ensure that the “Description”, “Reported Date” and “RIFS Screen” fields are completed as shown in the below screen shot before clicking “Save”

Patient Unmatched 01-Jan-1900

Profile

Category: Social Hx | Type: | Description: RIFS Screen | Onset Date: dd-MMM-yyyy | Status: Current | Reported Date: 15-Apr-2020 | Confirmation Status: Confirmed | Risk Factor: | Confidential:

Observations

RIFS Screen: Positive Unable to Complete Declined | Language barrier

Save

Notes

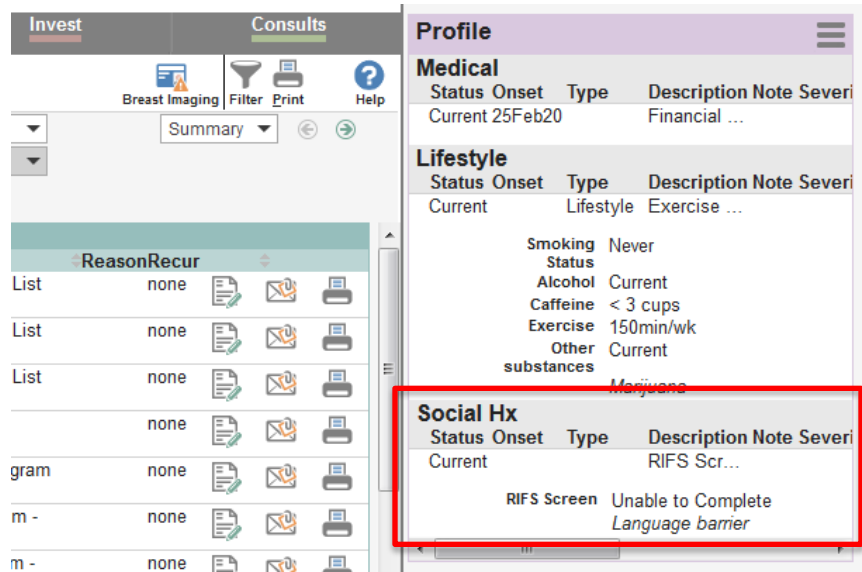
Description = RIFS Screen

Select the screening result for the patient

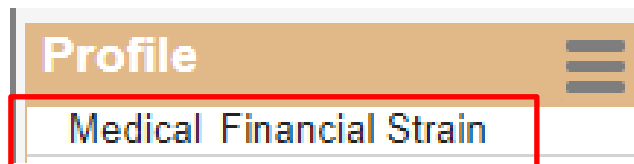
Add notes if applicable

Reported Date = date screening result was obtained

- The RIFS screening result will now show in the Profile section of the patient’s chart



3. It is recommended that the healthcare provider **record ‘Financial Strain’ in the patient’s Profile under the “Medical” category** 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 patient profile, “Financial Strain” will appear in the patient’s chart as shown below.



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.

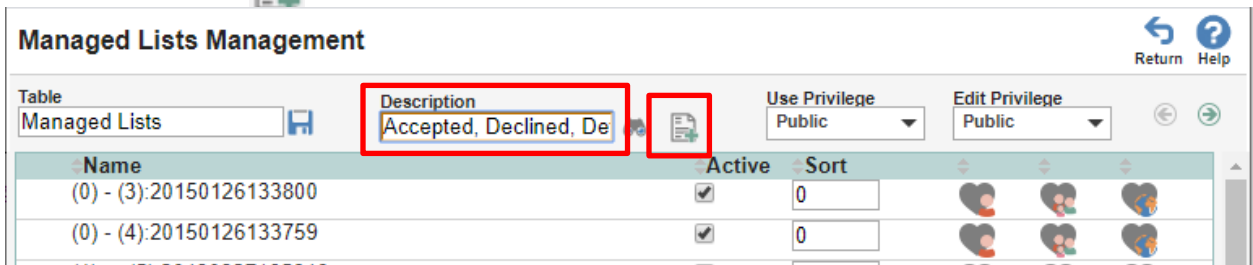
If a patient defers the offer for additional resources, the clinic team can create a reminder to reoffer additional resources the next time the patient calls and/or visits the clinic.



Consider recording the three types of referral outcomes as an observation that can be added to patient profiles.

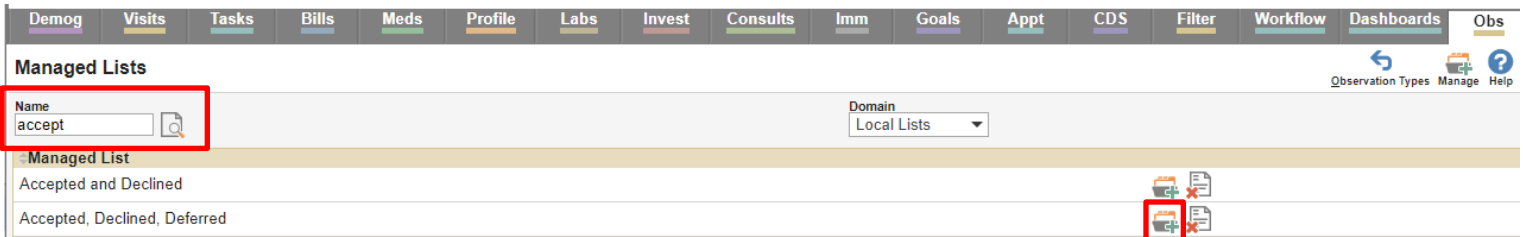
Start by creating a new “RIFS Referral” observation type:

Note that, in the below example, a single referral outcome observation type is created to track referral outcomes. Your clinic team may also chose to track referral outcomes for different types of referrals offered (e.g. social work, housing, financial aid, etc.). In this case, separate observation types will need to be created for each type of referral tracked.

- Users with administrative access can click “Templates”  to go to the “Template Management” module
- From there click the “Obs” tab 
- In the “Obs” area click “Types”  and then click “Lists” 
- Click “Manage” 
- Type “Accepted, Declined, Deferred” in the “Description” field and click “add” 





- Click “Return” 
- Search for your new list by name and click Edit Managed List 



Accepted, Declined, Deferred Dropdown Management


  Return Help

Table: Accepted, Declined, Deferred Dropdown

Description: Code:  

Use Privilege: Public Edit Privilege: Public



No results found using the specified criteria.

- Type “Accepted” in the Description field and click “Add” 
- Repeat for “Declined” and “Deferred”. Also ensure the “Sort” numbers are such










Accepted, Declined, Deferred Dropdown Management

  Return Help




Table: Accepted, Declined, Deferred Dropdown

Description: Code:  

Use Privilege: Public Edit Privilege: Public

Name	Code	Active	Sort			
Accepted	1137598	<input checked="" type="checkbox"/>	<input type="text" value="0"/>			
Declined	1137599	<input checked="" type="checkbox"/>	<input type="text" value="1"/>			
Deferred	1137600	<input checked="" type="checkbox"/>	<input type="text" value="2"/>			

Export options: Excel | PDF | RTF

- Click “Return”  Return
- Click “Return to Observation Types”  Observation Types
- Now create a new observation: in the “Obs” tab , click “New”



AGTT

Observation Type

Observation Name: RIFS Referral

Data Type: Radio Button

Managed List: Accepted, Declined, Def...

Order: 0

Increment: 1

Units/Format: []

Display Range: []

Lower Range: []

Upper Range: []

Drilldown Template: []

Default Graph Template: []

System: []

Code: []

Synonyms: []

Name Format (CSS)

Value Format (CSS)

Disable Comment: []

Hide Observation Label: []

Enable add-on usage: []

Auto Invoke Drilldown: []

Allow Overflow: []

Mapped Display Field: []

Allergy Classification: []

Use Privilege: Public

Edit Privilege: Public

Calculation: []

Parent Flag & ID: []

User Defined Calculation Expression: []

Update

Observation Name is "RIFS Referral"

Data Type is "Radio Button"

Click on the "Managed List" dropdown to find your new list

- Once the three fields in the above screen shot are populated, click "Update" to save your new observation
- The new observation type is now ready to use to indicate the referral status

To add a new RIFS referral status to the patient profile:

- Click on the “Menu” in the “Profile” section of the patient’s

The screenshot shows a patient profile page with tabs for Labs, Invest, and Consults. A table lists various items with columns for Reason and Recur. On the right, the Profile sidebar is open, showing a menu with options like Preferences, Care Plan, Medical, Psychiatric, Surgical Hx, Concerns, Developmental, Family Hx, Lifestyle, Obstetric, and Social Hx. The Social Hx option is highlighted with a red box.

chart, then click “Social Hx”

- Click on the “Menu” in the “Observations” section and then click “Add Observation”

The screenshot shows the Observations section of the patient profile. On the left is the Profile form with fields for Category (Social Hx), Type, Onset Date, Status (Current), Reported Date (13-Mar-2020), Confirmation Status (Confirmed), Risk Factor (checked), and Confidential (unchecked). On the right, the Observations sidebar is open, showing a menu with options like Find Observation Template, Add Observation, Add CC, Remove Empty Observations, Edit Observation Template, and Help. The Add Observation option is highlighted with a red box.

- Type “RIFS” in the Description field and click the binoculars icon or “Enter” on your keyboard.

Observation Types Management

Name	Code	Select	Use Privilege	Edit Privilege
RIFS Referral		<input checked="" type="checkbox"/>	Public	Public
RIFS Screen		<input checked="" type="checkbox"/>		

Export options: Excel | PDF | RTF

- Click on the “RIFS Referral” observation type from the list that appears.

- Once the “RIFS Referral” observation is added, ensure that the “Description”, “Reported Date” and “RIFS Referral” fields are completed as shown in the below screen shot before clicking “Save”

Profile Patient Unmatched 01-Jan-1900

Category: Social Hx | Type: [dropdown]

Description: RIFS Referral

Onset Date: [calendar icon] | Status: Current

Reported Date: 13-Mar-2020 | Confirmation Status: Confirmed

Risk Factor: | Confidential:

Notes: [text area]

Save [icon]

Observations

RIFS Referral Accepted Declined Deferred

Housing Referral

Add notes if applicable

Select the referral outcome for the patient

Description = RIFS Referral

Reported Date = date referral was offered

The screenshot displays an EMR interface. On the left, a table titled 'Consults' shows a list of entries with columns for 'Reason' and 'Recur', all containing the value 'none'. Each row has icons for document, envelope, and printer. On the right, a 'Profile' sidebar is visible, containing sections for 'Medical', 'Lifestyle', and 'Social Hx'. The 'Social Hx' section includes a table with columns 'Status', 'Onset', 'Type', and 'Description'. A red box highlights a row with 'Current' status, 'RIFS Referral' type, and 'Accepted Housing Referral' description. Below this, another row shows 'RIFS Screen' with 'UTC' and 'Language barrier' descriptions. Further down, 'Goals' and 'Allergies' sections are partially visible.

- The RIFS referral result will now show in the Profile section of the patient’s chart

TIP: It is important to ensure that clinic team members record information in the EMR in a standardized way.

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 Guiding Principles to Effective Use of EMR for Patient's Medical Home Work 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 is an example search.

Note that it is important to check off "not" when adding the search criteria identifying patients who have been offered the screening question in the last six months. This will 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 "Observation" section indicates that patients with a RIFS Screen observation in the "Social History" section of their Profile with a date in the last six months will be excluded from the search). It is also important to include all active patient statuses in the search (see the "Status" line in the Demographics section of the below search). This will ensure that all active patients are included in the search. Lastly, it is important to include that the Status of the RIFS Financial Strain diagnosis is "Current" in the Profile section of the search. This ensures that only patients currently experiencing financial strain are flagged for follow-up.

Criteria		Unmask
Template: RIFS Positive Due for		
Demographics		
Status	Active	
Primary Provider	Topps, David A.	
Age Range	18 to 200	
Profile		
Category	Medical	
Status	Current	
Diagnosis	RIFS	Financia Starts
Visits		
Task		
Observation		
Category	Social Hx	<input checked="" type="checkbox"/> not
Observation	Exact	RIFS Screen
Date	17-Sep-2019 to 17-Mar-2020	
Medications		
Allergy		
Goals		
Billing		
Appointment		
Date	17-Mar-2020 to 17-Mar-2020	

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 Med Access EMR Help Files for Goals and My Tasks for additional information on creating and managing individual patient reminders:

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.

Criteria		Unmask
Template: RIFS Positive Due for		
Demographics		
Status	Active	
Primary Provider	Topps, David A.	
Age Range	18 to 200	
Profile		
Category	Medical	
Status	Current	
Diagnosis	RIFS	Financia Starts
Visits		
Task		
Observation		
Category	Social Hx	<input checked="" type="checkbox"/> not
Observation	(last) Exact RIFS Screen	
Date	24-Oct-2019 to 24-Apr-2020	
Medications		
Allergy		
Goals		
Billing		
Appointment		
Date	Back None Ahead None	

2. Create individualized patient reminders to flag patients who have a 'Financial Strain' diagnosis and have not visited the clinic as outlined in their individualized follow-up plan. See the Med Access EMR Help Files for Goals and My Tasks for additional information on creating and managing individual patient reminders:

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 Profile.

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 searches that a team may wish to perform in their EMR for their patients who are experiencing financial strain:

Criteria		Unmask
Template:	RIFS Positive Patients	
Demographics		
Status	Active	
Primary Provider	Topps, David A.	
Age Range	18 to 200	
Profile		
Category	Medical	
Status	Current	
Diagnosis	RIFS	Financia Starts
Visits		
Task		
Observation		
Medications		
Allergy		
Goals		
Billing		
Appointment		

- 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 the Social Hx category of the patient Profile. If your clinic team records the screening result in a different EMR field, please include that field in the search instead.

Criteria 🔒 Unmask

Template: RIFS # of Pts Screened 📄 📄 📄 📅 🔄 ✖

Demographics ✖

Status + Active ▼
Primary Provider Topps, David A. ▼
Age Range 18 to 200

Profile +

Visits +

Task +

Observation + ✖ not

Category Social Hx ▼
Observation +
 last Exact 👁️ ▼
Date 01-Jan-1900 📅

Medications +

Allergy +

Goals +

Billing +

Appointment +

- 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 in the Profile under the “Social Hx” category. If your clinic team records the referral outcome in a different EMR field, please include that field in the search instead.

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.

Criteria Unmask	
Template: RIFS Positive Pts with [Icons]	
Demographics ✕	
Status +	Active
Primary Provider	Topps, David A.
Age Range	18 to 200
Profile + ✕ [] not	
Category +	Medical
Status	Current
Diagnosis +	RIFS Financia 👁 Starts '
Visits +	
Task +	
Observation + ✕ [] not	
Category	Social Hx
Observation +	<input checked="" type="checkbox"/> last Exact RIFS Referral 👁
Date	01-Jan-1900 📅
Medications +	
Allergy +	
Goals +	
Billing +	
Appointment +	

- Number of active patients who are experiencing financial strain and have accepted a RIFS referral

Note that the below example is for clinics recording the referral outcome in the Profile under the “Social Hx” category. If your clinic team records the referral outcome in a different EMR field, please include that field in the search instead.

Criteria 🔒 Unmask

Template: RIFS Social Work Ref
📄 📄 📄 📄 🔄 ✖

Demographics ✖

Status +	Active ▼
Primary Provider	Topps, David A. ▼
Age Range	18 to 200

Profile + ✖ not

Category +	Medical ▼
Status	Current ▼
Diagnosis +	RIFS Financia 👁 Starts ▼

Visits +

Task +

Observation + ✖ not

Category	Social Hx ▼
Observation +	
<input checked="" type="checkbox"/> last	Exact ▼ RIFS Social Work Refer 👁 Contains ▼ (Accepted as String ▼)
Date	01-Jan-1900 📅

Medications +

Allergy +

Goals +

Billing +

Appointment +

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.