### **Chapa-De Diabetes RN Case Manager Workflow**

#### Purpose

Diabetes Nurse Case Managers can order refills for diabetes/diabetes related medication(s) to ensure timely refills and promote patient adherence.

#### Workflow

There are two avenues in which a nurse may address a refill request: through the E prescriptions (E Jelly Bean) or through a telephone encounter (T Jelly Bean).

#### **E Jelly Bean**



• The E Jelly bean screen will display prescription refill request sent electronically from the patient's pharmacy.

Provider All	Set Default	acility 🔹	<b>▼</b>
Type Status Provider	Patient	Pharmacy	Drug Description Se
Refill Reques Received DZURELLA, SCOT		Chapa-De Indian Health Pro	DILT XR 240 MG CAPSULE
Refill Reques Received ROYSMAN, ANNA		Chapa-De Indian Health Pro	Focalin XR 20 MG Capsule Extended Rel
Refill Reques Received TENWOLDE, BOBE		Chapa-De Indian Health Pro	Butrans 5 MCG/HR Patch Weekly
Refill Reques Received MALEK, RICHARD		Sierra Market Pharmacy	WELLBUTRIN XL 300 MG TABLET EXTEN
Refill Reques Received DZURELLA, SCOT		Chapa-De Indian Health Pro	Nexium 20 (mg) Capsule Delayed Relea
Refill Reques Received KARUNAKARAN, F		Chapa-De Indian Health Pro	OUTSIDE RX 3
Refill Reques Received ARMISEN, VALESI		RITE AID-720 SUTTON WAY	prednISONE 2.5mg PO TABS Tab
Refill Reques Received HASSE, MIHAELA		Chapa-De Indian Health Pro	Hydrocodone-Acetaminophen 10-325 M
Refill Reques Received MULLIGAN, MICH		WAL-MART NEIGHBORHOOD	Cyclobenzaprine HCl 10MG Tablet
Refill Reques Received MULLIGAN, MICH/		WAL-MART NEIGHBORHOOD	Gabapentin 300MG capsule
Refill Reques Received ARMISEN, VALES		CVS STORE 16473 IN TARG	ESTRADIOL 1 MG TABLET
Refill Reques Received MULLIGAN, MICH/		Chapa-De Indian Health Pro	TRAMADOL HCL 50 MG TABLET
Refill Reques Received FOWLER, ELENA		Chapa-De Indian Health Pro	Olanzapine 2.5 MG Tablet
Refill Reques Received LEE, DEANNA		Chapa-De Indian Health Pro	Azithromycin 250 MG Tablet
Refill Reques Received NKADI, TOCHUKU		Chapa-De Indian Health Pro	BRIMONIDINE/TIMOLOL 0.2%/0.5% OP
Refill Reques Received QUION, MICHAEL		Chapa-De Indian Health Pro	OXYCODONE-ACETAMINOPHEN 5-325 №
Refill Reques Received HASSE, MIHAELA		Chapa-De Indian Health Pro	Valium 10 MG Tablet
Refill Reques Received MULLIGAN, MICH/		Chapa-De Indian Health Pro	CLONAZEPAM 1 MG TABLET
Refill Reques Received ARMISEN, VALES		CVS STORE 16473 IN TARG	ESTRADIOL 1 MG TABLET
Refill Reques Received HASSE, MIHAELA		KMART PHARMACY #9746	LORAZEPAM 1 MG TAB LEAD
Refill Reques Received HASSE, MIHAELA		Chapa-De Indian Health Pro	Norco 10-325 MG Tablet
Refill Reques Received KIFER, ROBERT		Walgreen Drug Store	IBUPROFEN 800MG TABLETS
Refill Reques Received Kifer, Robert		Walgreen Drug Store	AMOXICILLIN 500 MG ORAL CAPSULE
Refill Reques Received Kifer, Robert		Walgreen Drug Store	IBUPROFEN 800 MG ORAL TABLET



- 1. To start processing a refill, start by opening the 'Patient Hub'
- 2. From the 'Patient Hub,' a patient's lab and encounters can be examined to determine refill.
  - a. Use 'ePrescription Log' to determine when this prescription was last filled
- 3. Use *Diabetes Medication Algorithm* to help guide response to refill (See Page 7).
- 4. If OK to refill, select 'Approved' and select the number of refill to be given.
  - a. Click 'Send ePrescription' button
- 5. If prescription falls out of RN Refill Protocol
  - a. Select 'Denied New RX to Follow' and click 'Send ePresciption' button

J Telephone Encounter *				x )
Hardin, Matthew , 51 Y, M Info Hu NEED ADDRESS AUBURN, CA 35602- M:916-204-9328 DOB:06/18/1966 Medical Summary   CDSS   Alerts   L	b R Allergies ⊠ Billing Alert :11/15/17:212 lbs. Ins: GMC Acc Bal: No Access Guar: Matthew Ren: KARUNAKAI anslator: No abs DI   Procedures   Growth Chart   Im	CLICK TO EDIT Pharmacy: Chapa=de m/T.Inj   Encounters   Pat	ECURE NOTES	nabled
Answered by Nguyen, Phillip Patient Sel Info Hub Caller Reason V Perform Eligibility Chord. Messa e Rx Eabs/DI Notes Messa e Print script Send Rx Print	Date       Time       High Privile         4 / 6 /2018       4:25 PM       Provider         Provider       DZURELLA, SCOTT A       Image: Chapa DE INDIAN HEALTH PROG         Pharmacy       CHAPA DE INDIAN HEALTH PROG       Image: Chapa DE INDIAN HEALTH PROG         Info70 ATWOOD RD       AUBURN, CA 95603       Tel:S30-887-2836 Fax:S30-889-2971         Facility       Chapa De Indian       3. Select 'Rx'         Assigned To       3. Select 'Rx'         Myster, Phillip       Image: Complaints       Image: Complaints         Add Action Taken       Add Action Taken         Report       Progress Notes       Cocume         QK       Cancel       Image: Cancel	prity Status Open Addressed Addressed and Docs Reviewed tab Check Spelling	use o Unco deper Date Atorvastatin Calorim 4 (OV) Unco deper La Co Hall 10 Esser La Co Hall 4. Atorvastatin Calorim 4 (OV) Date Atorvastatin Calorim 4 (OV) Date Atorvastatin Calorim 4 (OV) Date Date Atorvastatin Calorim 4 (OV) Date Date Atorvastatin Calorim 4 (OV) Date Date Atorvastatin Calorim 4 (OV) Date Atorvastatin Calorim 4 (OV) Date Atorvastatin Calorim 4 (OV) Date Atorvastatin Calorim 4 (OV) Date Date Atorvastatin Calorim 4 (OV) Date Atorvastatin Calorim 4 (OV) Date Atorvastatin Calorim 4 (OV) Date Date Atorvastatin Calorim 4 (OV) Date Date Atorvastatin Calorim 4 (OV) Date	f insulin mplicated opioid dence ntial hypertension cal atrial flutter 4. Click '+' of medication in question loxone HCI 8-2 MG Tr (mg) Capsule Extende ious 1 2 3 Ne ious 1 2 3 Ne
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b. A telephone encounter will generate

Answered by Da		nt Docs   Flowsheets   Notes		
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Diltazem Refill	Iguyen, Phillip	Diltiazem HCI ER 240 (mg) Ca 24 Hour: Taking ( <u>OV</u> )	apsule Extend <sub>E</sub>	5. Click 'R' for refill
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#### T Jelly Bean

- 7.Click 'OK' to send
- 1. Ideally all T Jelly Bean refill request, should be sent to you by pharmacy team with all prescription and pharmacy information appropriately filled out.
- 2. To start processing a refill, start by opening the 'Patient Hub'
- 3. From the 'Patient Hub,' a patient's lab and encounters can be examined to determine refill.
  - a. Use 'ePrescription Log' to determine when this prescription was last filled
- 4. Use *Diabetes Medication Algorithm* to help guide response to refill (See Page 7).
- 5. If numbers of refills or quantity dispensed needs to be changed, click anywhere on the prescription bar.

NEED ADDRESS AUBURN, CA 95602- Ni916-201-9328 DOB:06/18/1966 Vedical Summary   CDSS   Alerts	Nub [] Sa Allergies Wt 11/15/17:212 lbs. App(L):11/17/17(SC) PCP: DZURELLA. Granslator: No Labs   DI   Procedures	C Billing Alert S: GNC cc Bal: No Access uar: Matthew en: KARUNAKAI Growth Chart   Imm	CLICK TO EDIT harmacy: Chapande /T.Inj   Encounters   Par	ECURE NOTES	Enable Notweb eaabled
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6. A screen should pop up that will allow user to change quantity, SIG, and number of refills.

7. Verify pharmacy is right, then hit send button



8. Click 'Send ePrescription' to finalize.

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9. If prescription falls out of RN protocol, in the telephone encounter, indicate reason why Rx could not be refilled by protocol and forward to provider.





# Sulfonyurea Algorithm



# DPP4 Algorithm







# TZD Algorithm



## Insulin Algorithm



## Retinal Screen Scrubbing and Scheduling

PROCESS/ FLOW FOR RETINAL PHOTOGRAPHY SCHEDULING

1. There are two clinics in eCW for retinal screens to be scheduled.

- Retinal Screening Aub and Retinal Screening GV

- 2. Patients are scheduled for 45 minute appointments
- 3. Click Patient Search button at the top in eCW and input patient information to search for patient. Last name, first name.
- 4. In appointment window you must have the Patient's provider (this info is in their hub window) and retinal screening AUB or GV as the resource.
- 5. Adjust time as needed to create a 45 minute slot in clinic schedule
- 6. Insert patient into patient info in box. Ex Doe, John (make sure you have correct patient and verify DOB).
- 7. Visit type in the drop down as RetinalScr (Retinal Screening) and in the reason DM Eye Exam. Visit status will default to PEN (Pending) \*if patient has prior appointments change visit status to DUM PEN (Additional visits).\*
- 8. If patient has prior appointments scheduled (Ex. with PCP, Dental, Lab, and DM staff) on the same day please note in the general notes section, of the prior appointment, that patient has retinal screen after such appointments.
- 9. Click OK and verify that the appointment is where it is supposed to be.

\*Appointment blocks stay white if DUM PEN or if the patient hasn't confirmed appointment via text message.

Other appointment black colors

Green = Confirmed
Yellow = Arrived
Brown = Canceled
Grey = Checked out
Lavender = Answered phone
Light blue = Left a message
Fuchsia = Rescheduled appointment
Pink = Broken appointment
Purple = Unreachable

#### PROCESS/ FLOW FOR RETINAL PHOTOGRAPHY SCRUBBING

- 1. Click the "S jelly bean" in eCW > Office visits
- 2. Find Providers/resources at the top in the office visit tab
  - You will click the "..." button
  - Input all Providers/Resources in Aub or GV depending what clinic you are scrubbing for.
- Click the "sel" button by facility under the providers/resource box. Select the clinic you are scrubbing for Chapa-De Indian Health Program AUB or Chapa-De Indian Health Program GV. This will populate the patients for the day you are scrubbing for.
- 4. Scan List for DM Checks (3 MO, 6MO, F/u)
- 5. Search DM Pt. in eCW with Last name, First name verify you have the right pt. checking D.O.B.
  - Click encounters to see if patient has been scheduled for DM Eye Exam/retinal screen. If not check their CDSS Alerts.
  - Click DM patient's CDSS button located on top of HUB in blue.
     Check their DM Eye Exam alert is date is current, due or past due.
  - Double checking in Patient Documents in their HUB to see if they have had a DM Eye Exam/retinal screen elsewhere under the optometry tab. In this tab should show results of eye exam if patient brought in records or we asked to have their exam records faxed over to us from outside provider.
  - If after looking in the Patient's encounters, CDSS alerts and patient documents and NO DM Eye Exam has been documented we call the patient and schedule a Retinal Screen/DM Eye Exam.
     \*if patient states that they see an outside Eye Doctor we would ask for that information and call that providers office to fax over records.
- 6. Schedule Patient for Retinal Screen.

#### Schedule Scrubbing Workflow

The objective of this workflow is to identify patients with diabetes that have a PCP visit and for the Diabetes Case Managers to attempt to make contact with those patients. The patients are identified for contact by: 1) have an A1c >9 and/or 2) have not seen a DM case manager.

- 1. Quality Improvement department will send a list on Friday of all DM patients with appointments the following week.
- 2. The list will include: patient name; date and time of visit; PCP they are seeing; most recent A1c
- 3. DM Case Managers will identify the target patients.
- 4. DM Case Managers will give the list to DM Program Assistant.
- 5. Program Assistant will look at the Case Managers schedules and put a reminder block on their schedule.
- 6. DM Case Managers will make every attempt to contact the patient.
- 7. DM Case Managers will offer the patient a brief visit if time allows, give them information regarding the diabetes department (Diabetes Wellness & Prevention Programs brochure, upcoming class schedules and business card for contact information) and offer to schedule an appointment.
- 8. Appropriate charting will be completed. ie. Telephone encounter, brief template charting.
- 9. The block will be removed from the schedule. If a contact occurred the patient will be put on the Case Managers schedule. If no contact occurred, the block will be deleted.
- 10. Patients that are contacted will be added to the excel spreadsheet on Diabetes drive  $\rightarrow$  ++Client Contact++ folder  $\rightarrow$  Weekly schedule scrubbing folder.