## The After Visit Summary (AVS)

John M. Byrne, D.O., Rob Durkin, M.D., Richard Cho, RN BSN, Deanna Callahan, MPA, Shane Elliott, MBA VA Loma Linda Healthcare System

# Outline

- Introduction
- Background
- AVS Development
- Software Features
- Initial Evaluation Plan
- Questions

# **Poll Question**

In which area of expertise do you work?

- Clinical
- Information Technology
- Administrative
- Research
- Other

### Background -Patient Retention of Clinical Information

- Patients forget 40-80% of information from healthcare providers<sup>1</sup>
- What they do remember, they remember half incorrectly<sup>1</sup>
- More information given, the less patients remember<sup>2</sup>
- Poor retention leads to poor adherence, medication errors, missed appointments and perceptions of poor communication



# Background – Patient Engagement

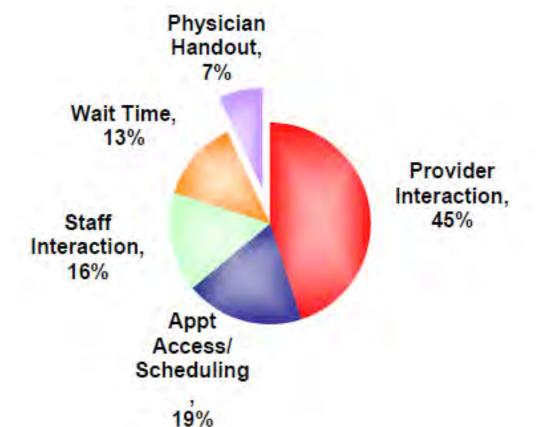
- Patients desire information about their care<sup>3</sup>
- Patients desire more information than they typically receive about their illness and their treatment plan<sup>3</sup>
- Combing oral and written information is better than oral or written only<sup>4</sup>
- Sharing electronic health record information on personal health records increases patient engagement<sup>5</sup>

Background – After Visit Summaries (AVS) and Personal Health Records (PHR)

- Why printed AVS and not just a PHR?
  - Printed after-visit summaries enhance patient trust and confidence in their physician <sup>3</sup>
  - Veterans have access to MyHealtheVet, however
     65% not registered<sup>6</sup>
  - Only 25% In-Person Authentication<sup>6</sup>
  - Experience at other sites with PHR and AVS
    - AVS third most frequently accessed information on PHR Group Health, Seattle<sup>7</sup>

## Background – After Visit Summaries and Patient Satisfaction

 Kaiser Permanente found through regression analysis that AVS contributes to overall outpatient satisfaction<sup>8</sup>



# **Poll Question**

- When you or your family have seen a physician, did you receive an after-visit-summary?
- Always
- Most of the time
- Sometimes
- Rarely
- Never

## Background - Meaningful Use Criteria

- Centers for Medicare and Medicaid Services (CMS) criteria for physician/hospital reimbursement for implementing an electronic health record (EHR)<sup>9, 10</sup>
  - Use computerized order entry
  - Drug-drug and drug-allergy checks
  - Maintain up-to-date problem list
  - Generate and transmit prescriptions electronically
  - Maintain active medication list
  - Maintain active medication allergy list
  - Record key demographics
  - Record and chart changes in vital signs
  - Record smoking status for patients 13-years and older
  - Exchange key information with other systems
  - At least one of 4 clinical decision support rules
  - Report hospital quality measures to CMS/state
  - Electronic copies to patients on request
  - Provide clinical summaries for patients for each office visit
  - Protect electronic health information

# Background - Meaningful Use <sup>11</sup>

- Objective
  - Provide clinical summaries for patients for each office visit
- Measure
  - Clinical summaries provided to patients for more than 50% of office visits within 3 days
- Additional parameters
  - May be provided through PHR, website, secure messaging, or printed copy

# Background - Meaningful Use <sup>11</sup>

- Clinical Summary Content from CMS
  - Patient's name
  - Providers name, visit location and date and contact information
  - Updated medication list
  - Updated vitals, reason for visit
  - Procedures and instructions
  - Updated problem list
  - Upcoming appointments
  - Laboratory and test orders
  - Laboratory and other test results

#### Background - VA and Meaningful Use

- VA seeking meaningful use certification<sup>12</sup>
  - "We're going to try to get certified on everything for inpatient and outpatient," said Dr. Theresa Cullen, director of health informatics for the VHA.
  - "If you look at what's required in certification, all of it benefits patient care. Striving for meaningful use will help us deliver better care for the veterans."

AVS Development Purpose of the After Visit Summary (AVS)

- Promote patient-centered, outpatient care
- Summarize medications, appointments, tests, patient education material and other instructions
- Enhance communication
- Engage patients in their care
- Improve recall of medical instructions
- Meets electronic health record meaningful use criteria



### **AVS Development Project Goals**

- For outpatient visits
  - Provide patients with relevant information about their office visit in a clinical summary
  - Develop patient-friendly language and format
  - Minimize work for the provider by automatically populating AVS with data from VistA
  - Provider user options
  - Save, print and upload to VistA Imaging and MyHealtheVet

## **AVS Development**

- 2009 VHA Innovations Grant
- Requirements gathering through patient and clinician focus groups
- Contractor developed software framework
- VA Loma Linda Healthcare System (VALLHCS) IT developer refined software
- Pilot testing in VALLHCS clinics
- Close collaboration with Informatics Team and clinicians



# **AVS Development**

- Clinician and Innovations input at VALLHCS
- Pharmacy Benefits Management (PBM) National Medication Reconciliation Workgroup
  - Add remote medications
  - Medication descriptions
- Region 1 Development Team
  - Changed from using a network service account to an application programming interface (API)
  - VistA service accounted changed to Application Proxy

## **AVS Features**

- Web-based, launched from the CPRS toolbar
- Imports data VistA/CPRS, Remote Procedure Calls (RPC's)
- Clinical Context Object Workgroup (CCOW)
- Auto refresh and manual refresh button
- Print, store VistA Imaging as PDF, stub note in CPRS
- Integration with Krames-On-Demand Patient Education
- Optionally saves and locks changes between users



## **AVS Features**

- Technical
  - -Java/J2EE with web-based front end
  - RPC's through national software (VistALink)
  - -No custom RPC's or MUMPS code
  - -Small Delphi client for CCOW
  - -Hosted at Denver Regional Data Center



## **AVS Features - AVS Workflow**

- Provider
  - Completes orders
  - Completes encounter
- Data
  - Automatically uploaded to AVS
  - Auto-refresh every 3 minutes, manual refresh available
- Additional instructions
  - Free text instructions
  - Krames-on-Demand Education Sheets
- Completed AVS
  - Printed to Windows printer or VistA printer
  - Stub note created in CPRS
  - PDF copy uploaded to VistA Imaging



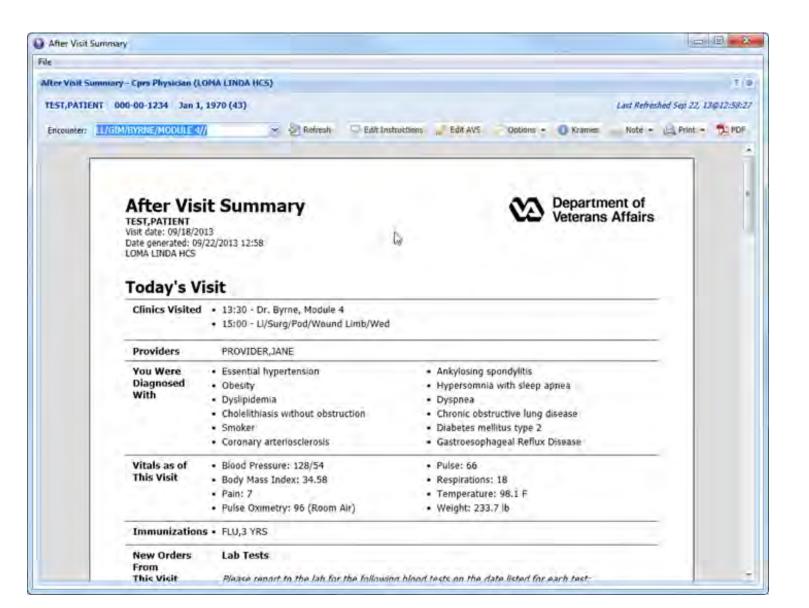
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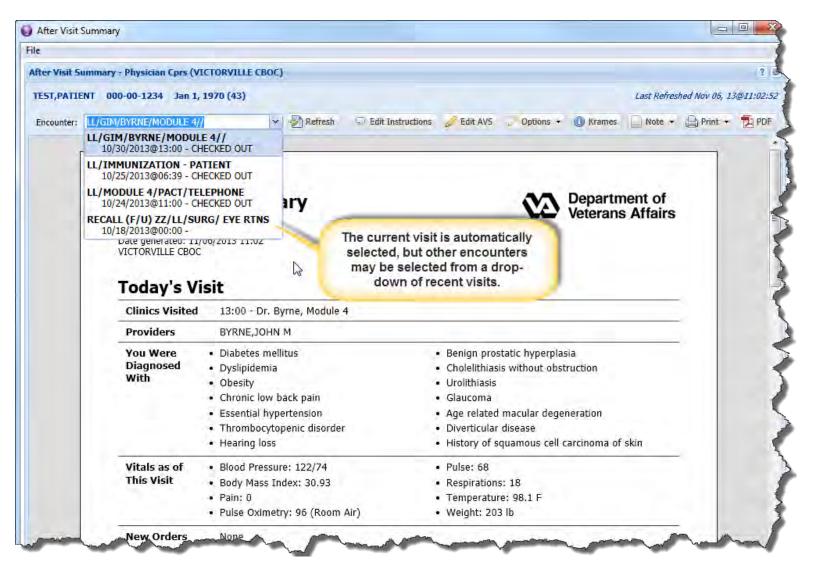
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#### AVS Features - View of AVS at Launch



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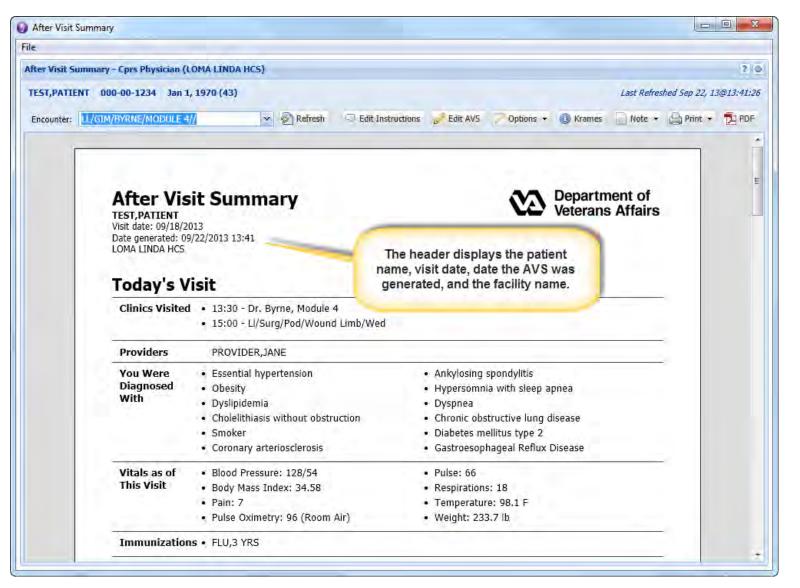
## **AVS Features – Visit Selection**



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### AVS Features – Header

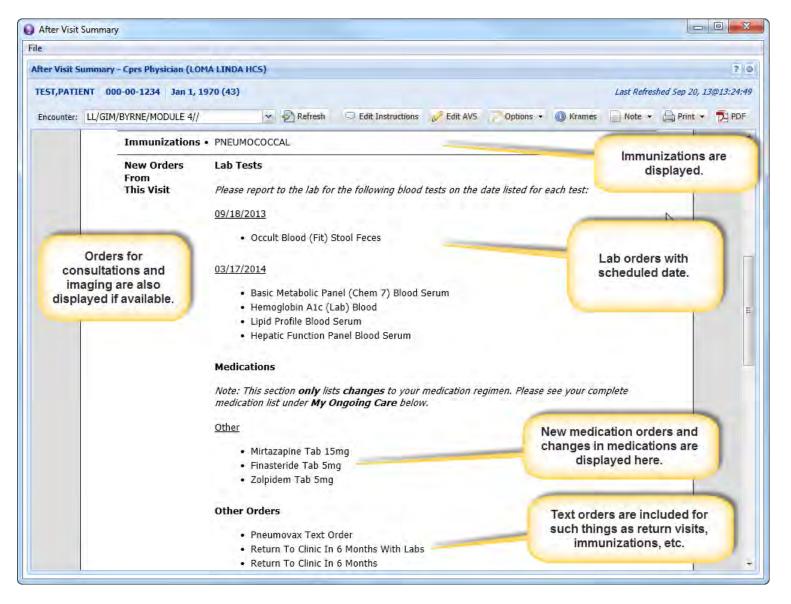


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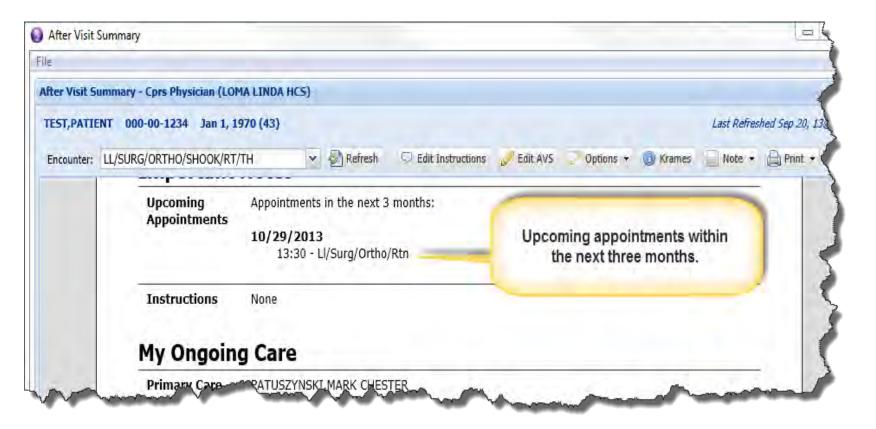
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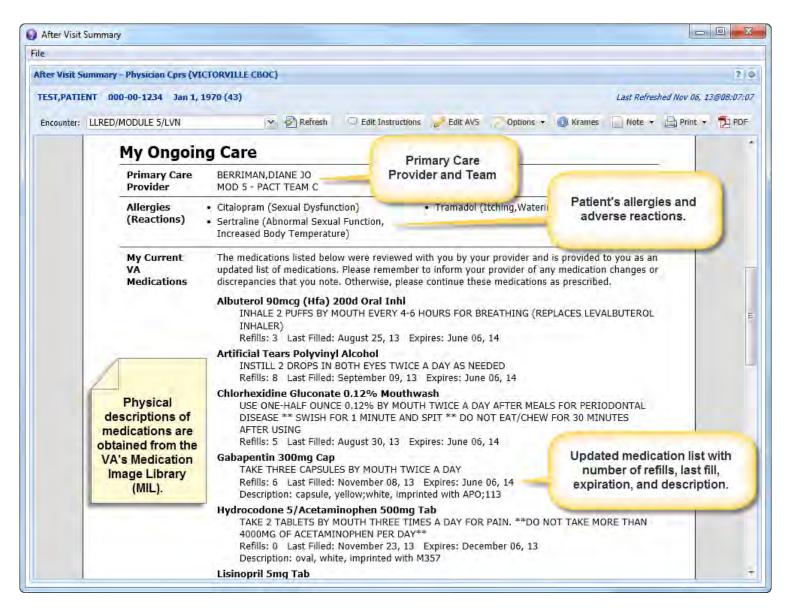


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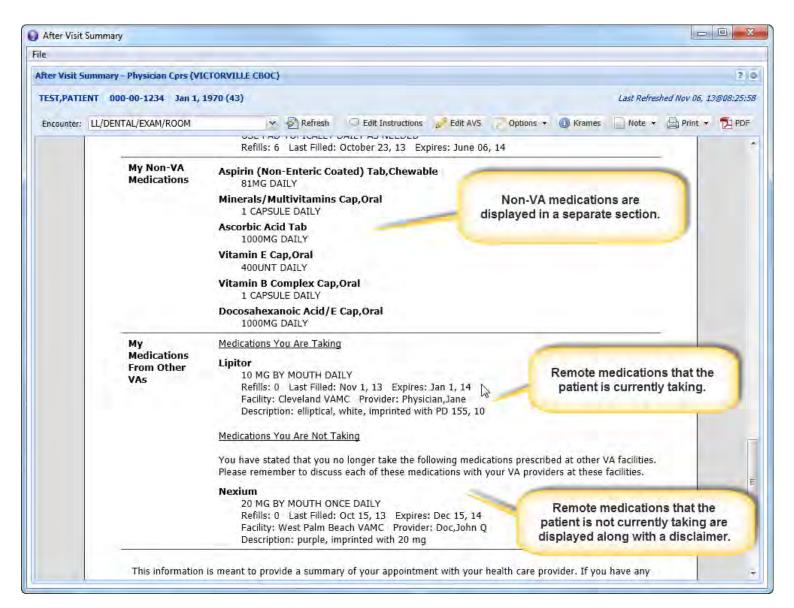


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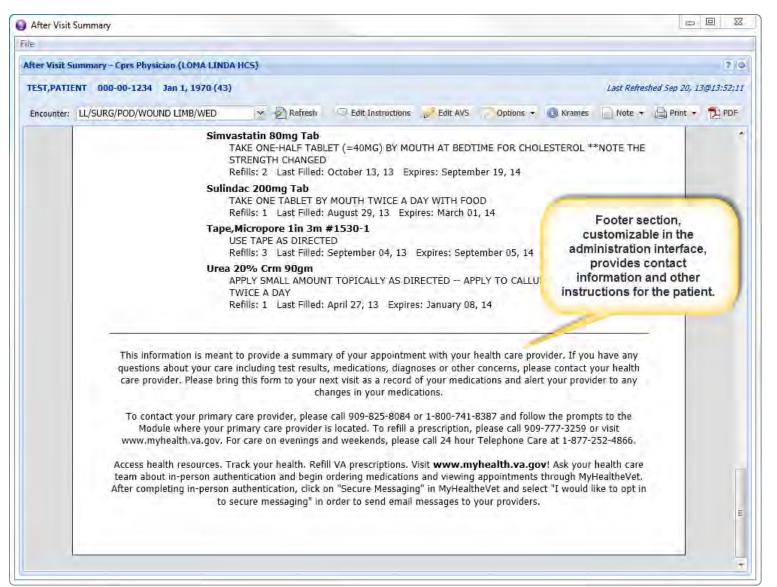




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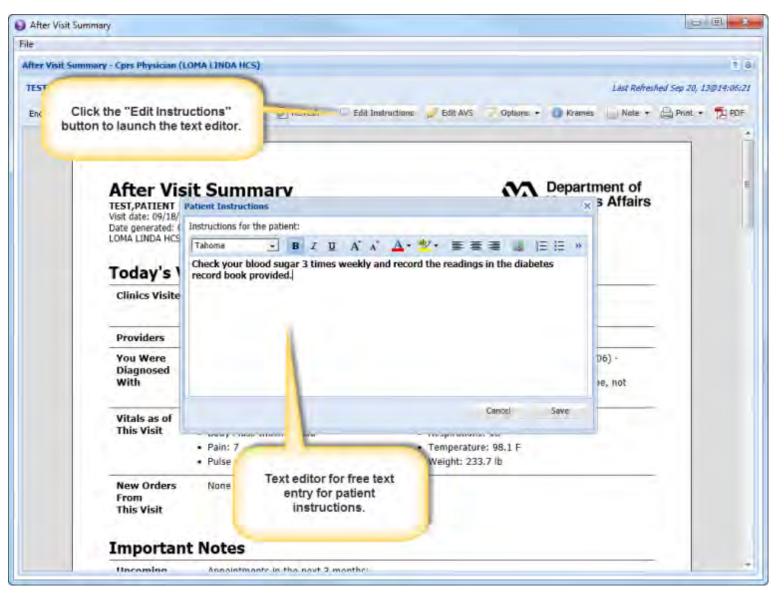


### **AVS Features - Footer**



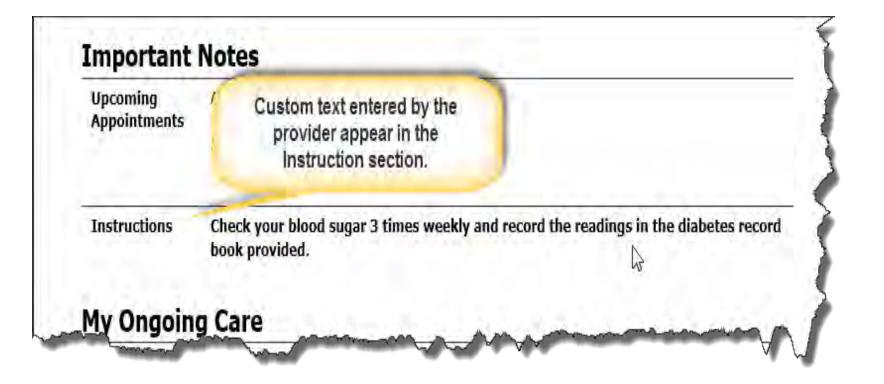
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### **AVS Features - Instructions**



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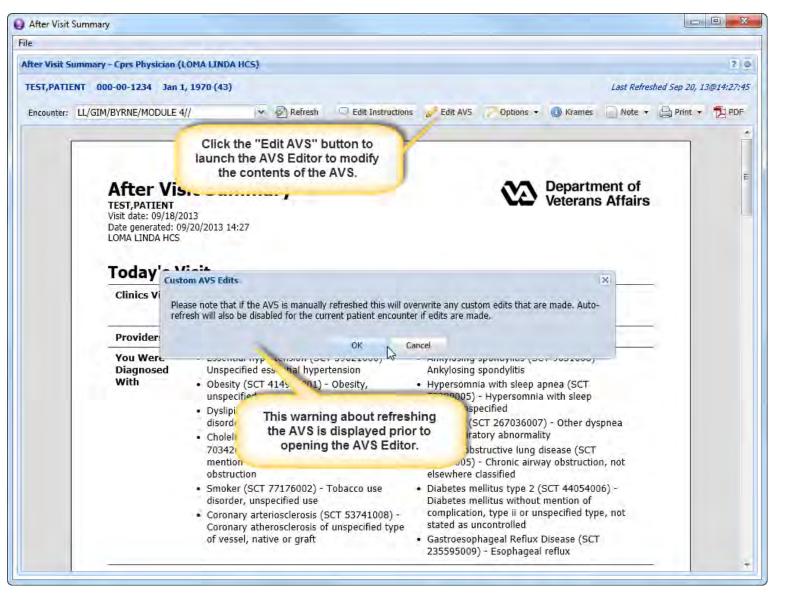
## **AVS Features - Instructions**





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### **AVS Features - Editor**



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### **AVS Features - Editor**

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	Return To Clinic In 4 Months (Note: do lab tests prior to visit)	
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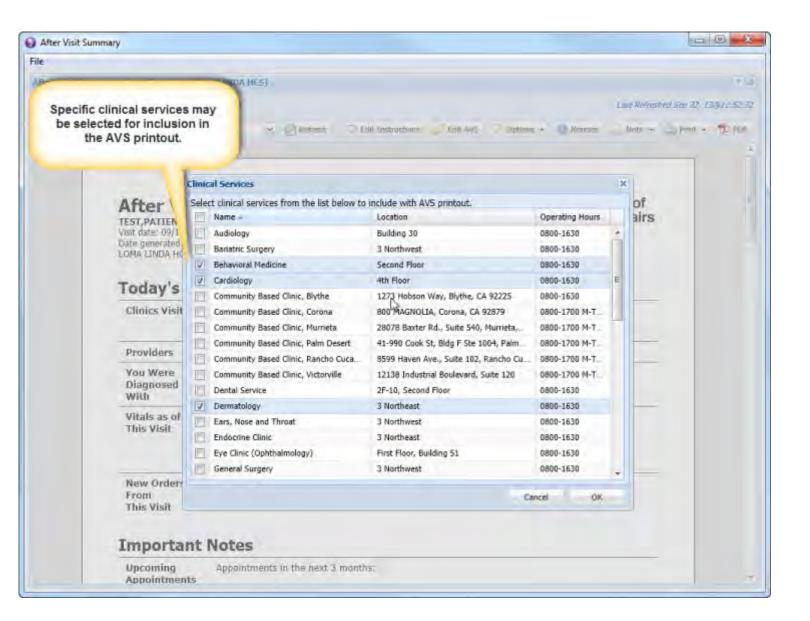
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#### **AVS Features - Clinical Services Information**

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Important Notes	
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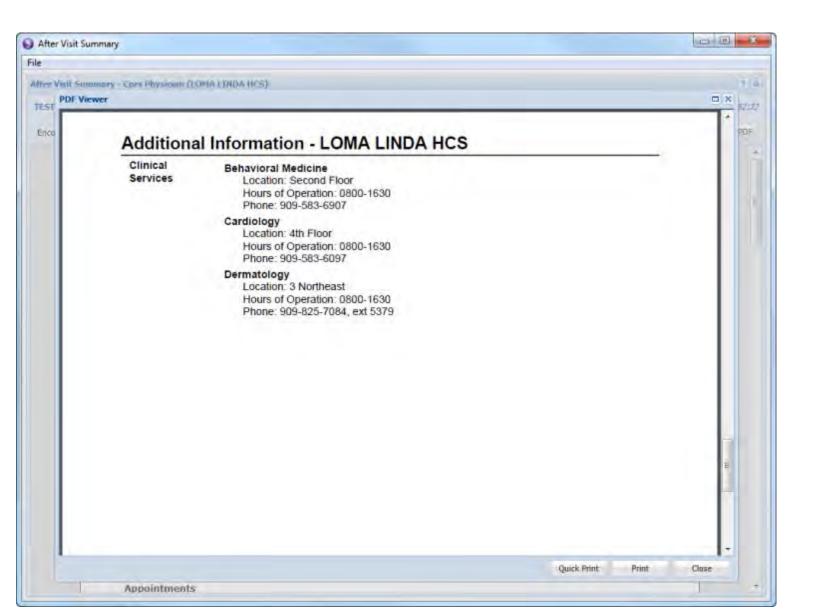
#### **AVS Features-Clinical Services Information**





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### **AVS Features - Clinical Services Information**





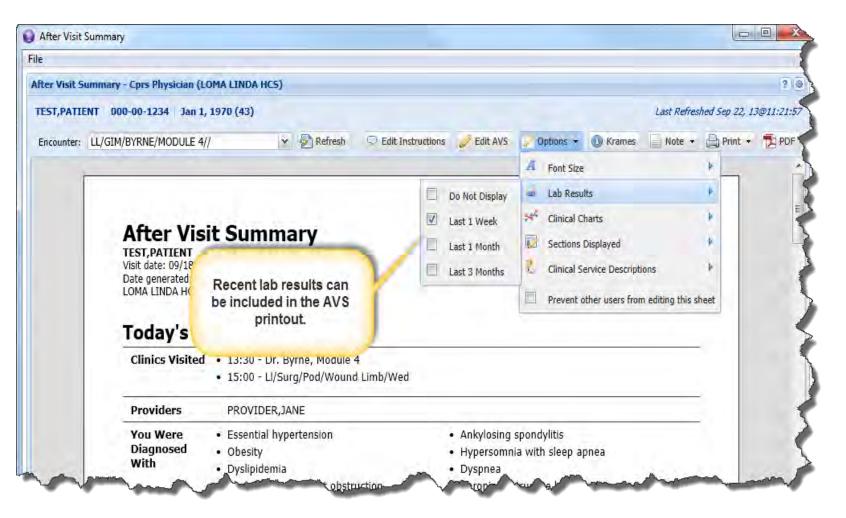
### **AVS Features - Font Size**

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### **AVS Features - Lab Results**



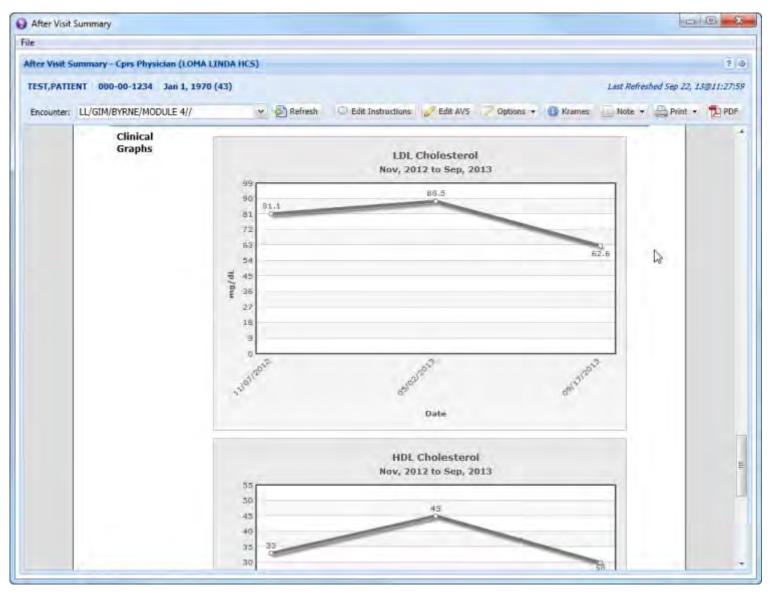
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## **AVS Features - Clinical Charts**

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## **AVS Features - Clinical Charts**

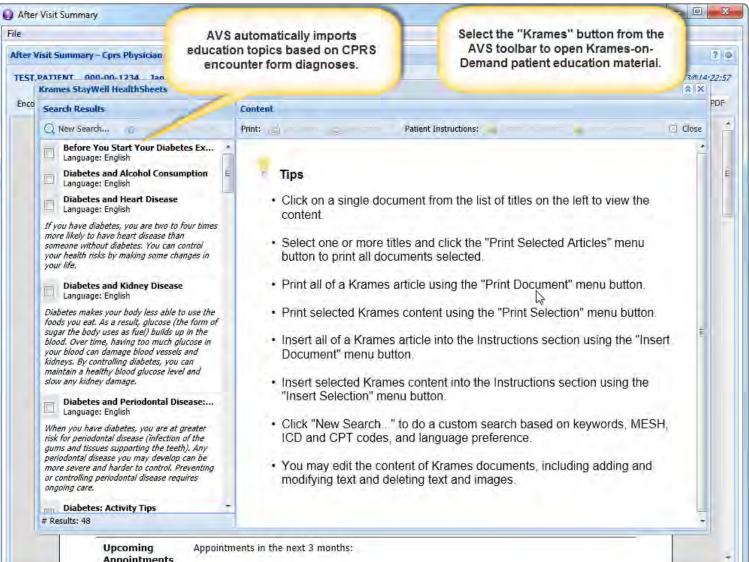


## **AVS Features - Sections Displayed**

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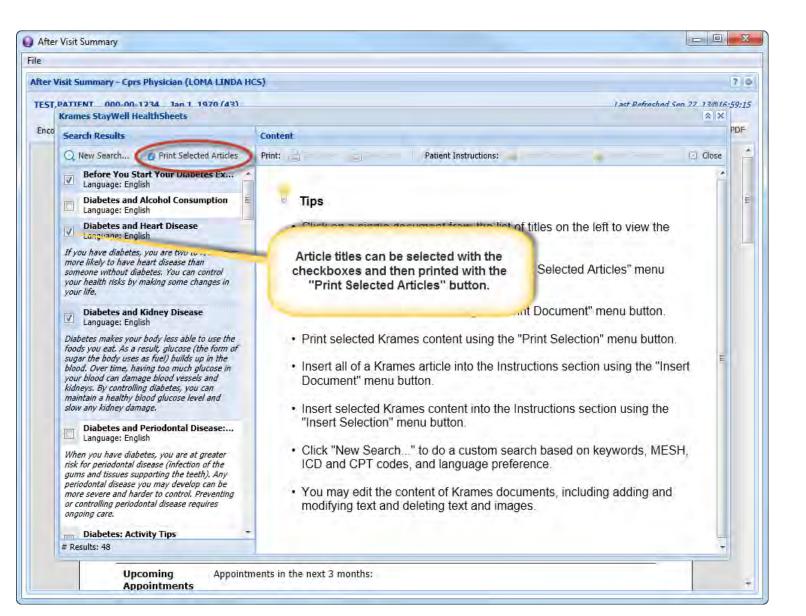
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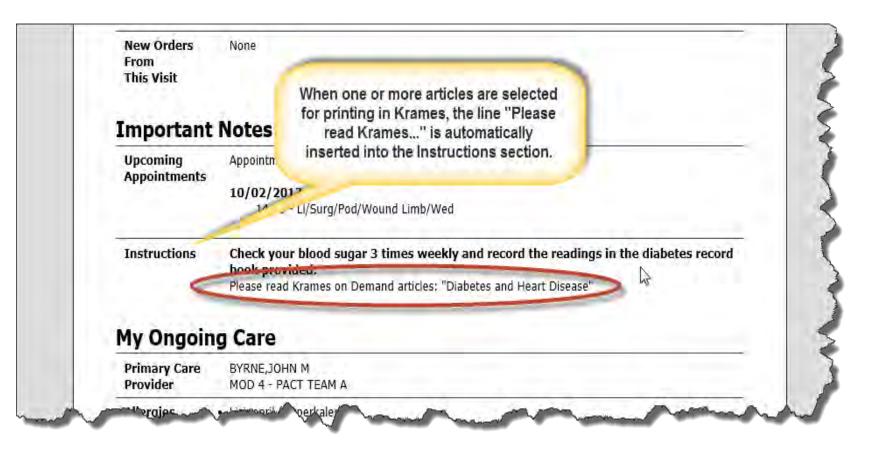
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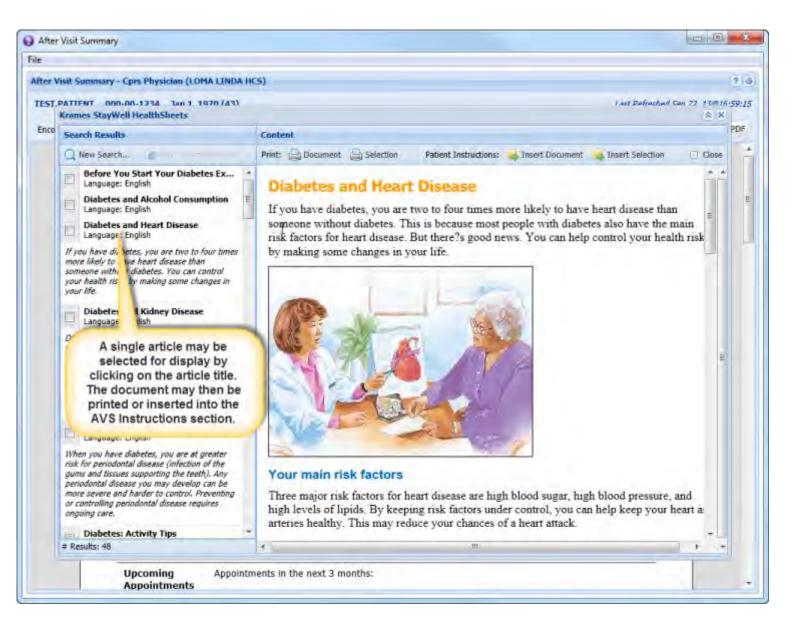




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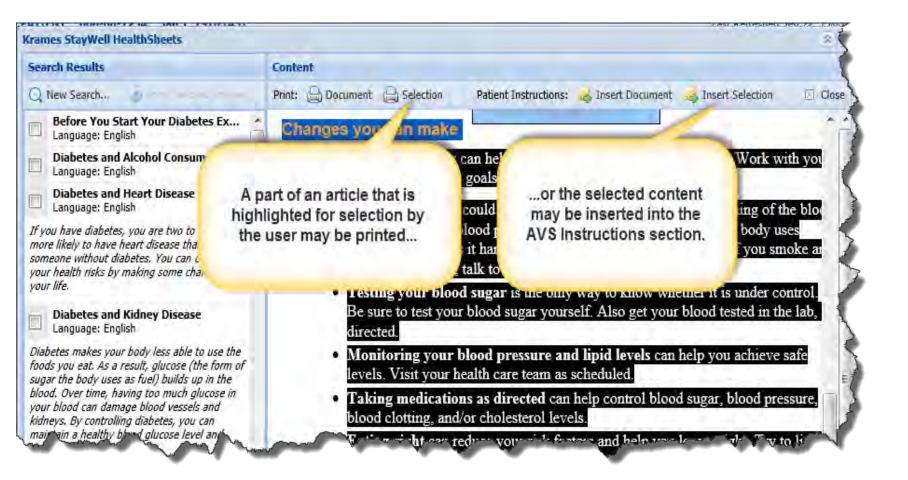


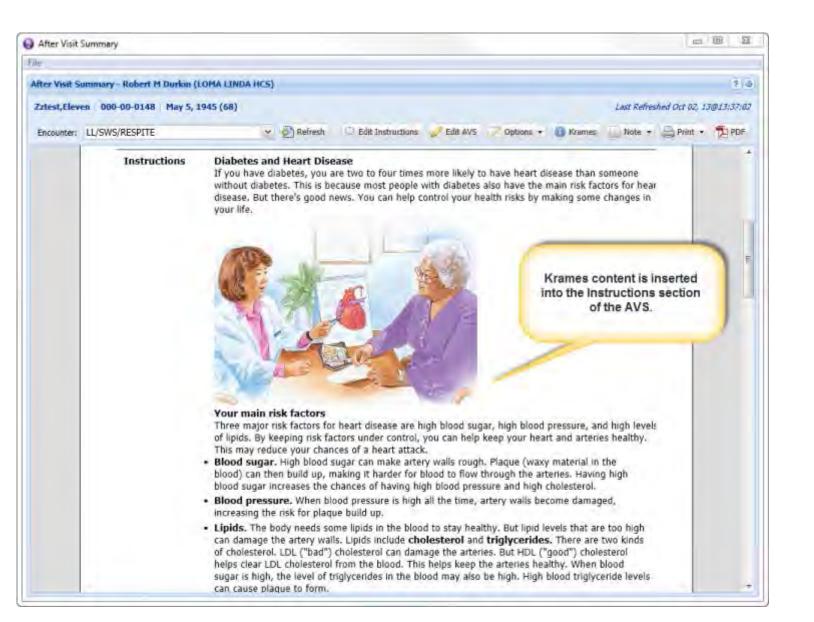




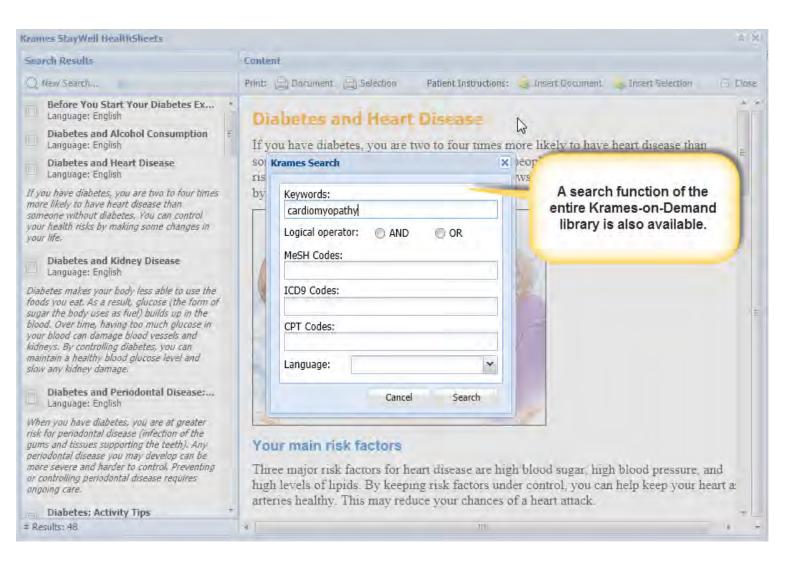


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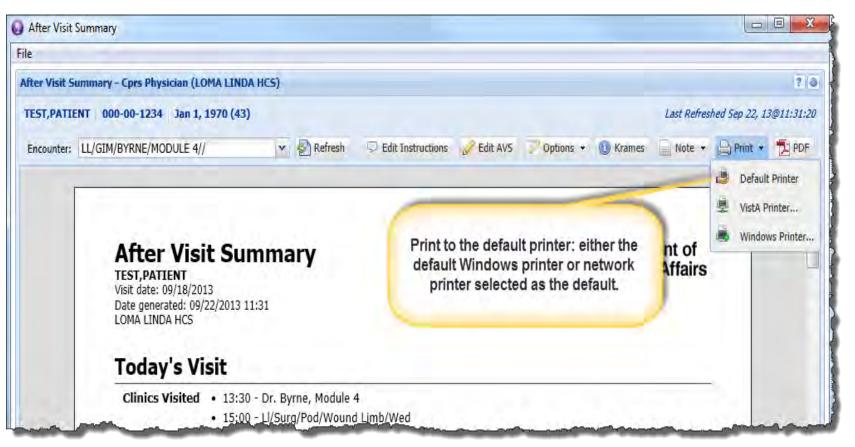


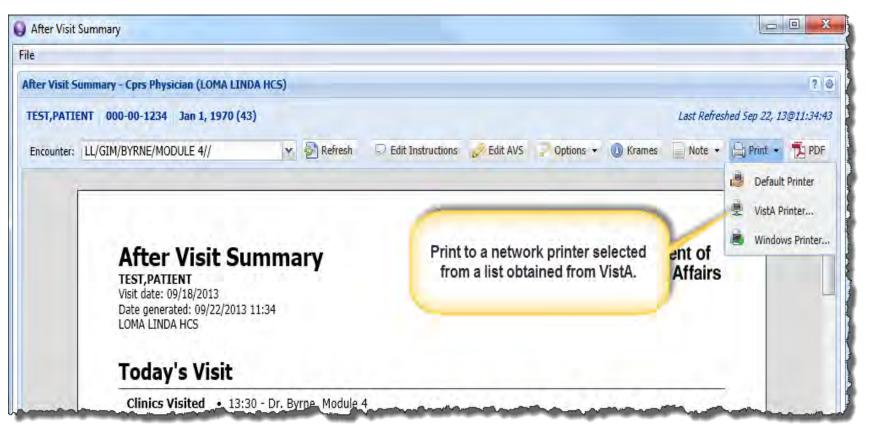




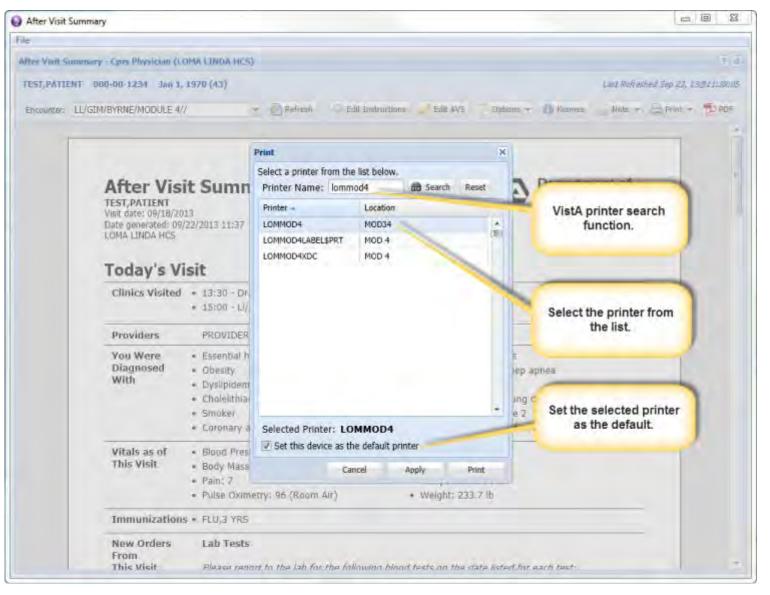


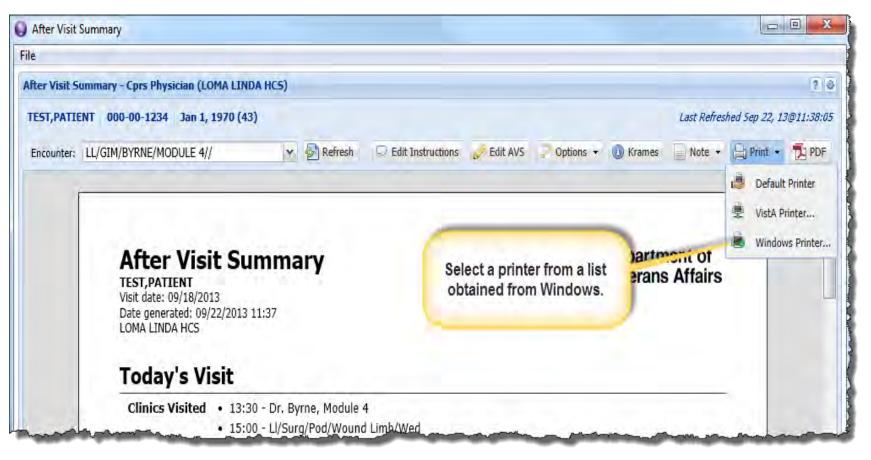








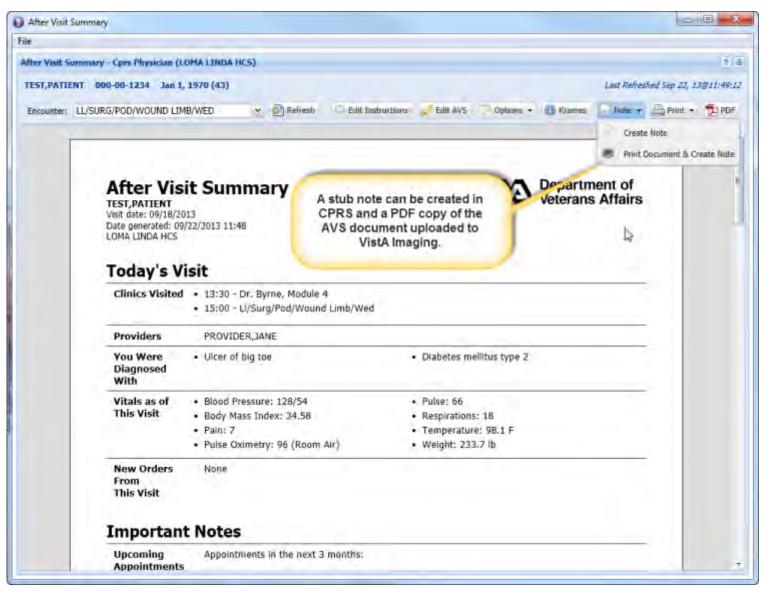




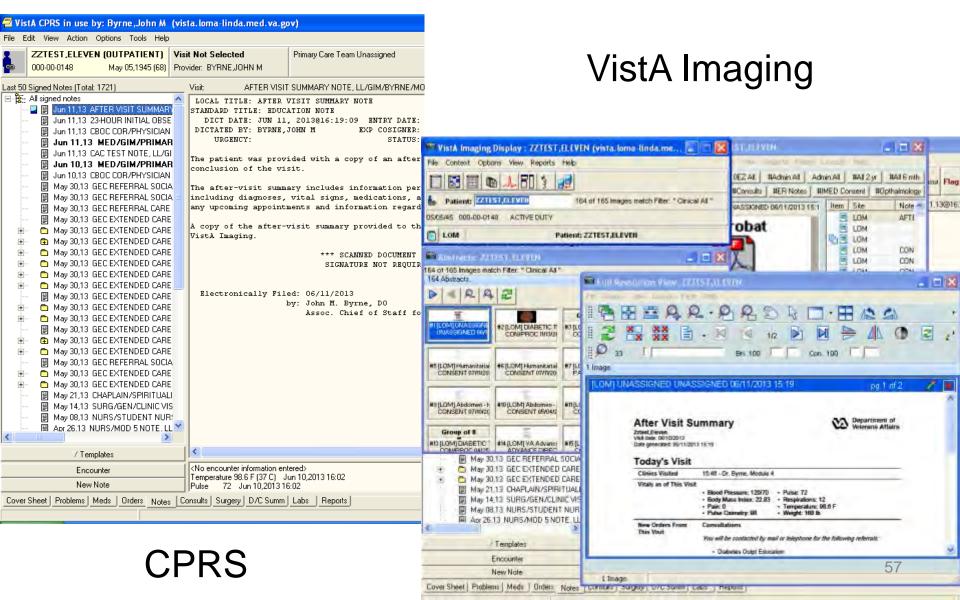


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### **AVS Features - Note Creation**



### **AVS Note Creation**



### **AVS Features - PDF Generation**





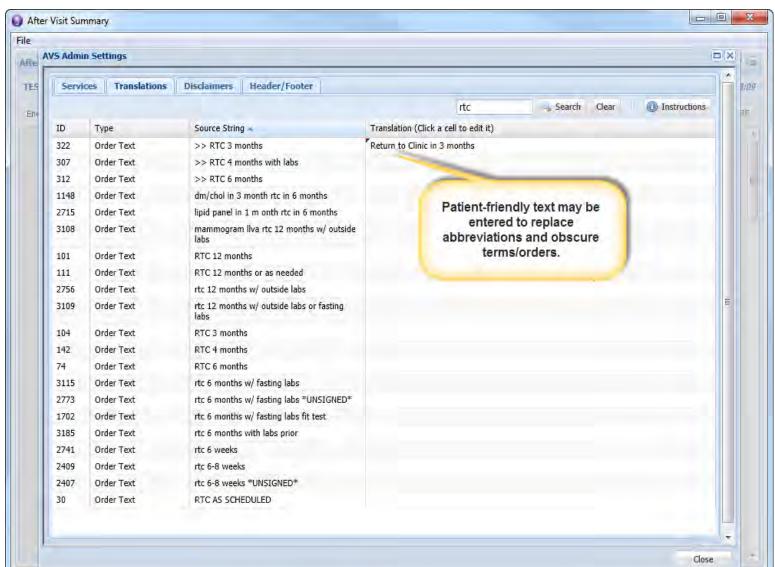
### **AVS Features - PDF Generation**

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	Today's Visit		
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	Providers PROVIDER, JANE		
	You Were Diagnosed With	Section and the second section of the second section of the second section of the second seco	
	<ul> <li>Essential hypertension</li> <li>Obesity</li> <li>Dyslipidemia</li> <li>Cholelithiasis without obstruction</li> <li>Smoker</li> <li>Coronary arteriosclerosis</li> </ul>	<ul> <li>Ankylosing spondylitis</li> <li>Hypersomnia with sleep apnea</li> <li>Dyspnea</li> <li>Chronic obstructive lung disease</li> <li>Diabetes mellitus type 2</li> <li>Gastroesophageal Reflux Disease</li> </ul>	
	Vitals as of This Visit		
	<ul> <li>Blood Pressure: 128/54</li> <li>Body Mass Index: 34.58</li> <li>Pain: 7</li> <li>Pulse Oximetry: 96 (Room Air)</li> </ul>	<ul> <li>Pulse: 66</li> <li>Respirations: 18</li> <li>Temperature: 98.1 F</li> <li>Weight: 233.7 lb</li> </ul>	
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### **AVS Features - Administrative Functions**

5 Admin Settings					1
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Module 3	First Floor	0800-1630	909-825-7084		
Module 4	Clinical Consistent information may	1800-1630	909-825-7084		
	Clinical Services information may e entered and may be printed with	)0-1630	909-583-6090		
Neurology	the AVS document.	10-1630	909-583-6049		
Neurosurgery	and Av b document.	10-1630	909-825-7084, ext 1		
Oncology	Double-click on a row to edit the	10-1630	909-583-6131		
Orthopedics	information for a clinical service.	00-1630	909-801-5650		
Pharmacy		0800-1800	909-825-7084, ext 5		
Physical Medicine and Rehabilitation (PM	&R) Second Floor	0800-1630	909-583-2061		
Plastic Surgery	3 Northeast	0800-1630	909-825-7084, ext 1		
Podiatry	First Floor, 1A84	0800-1630	909-801-5650		
Prosthetics	1790 West Park Avenue, Suite #100, Redla	0800-1630	909-825-7084, ext 6		
Pulmonary	Fourth Floor	0800-1630	909-583-6098		
Radiology	Third Floor	0800-1630	909-583-6069		
Redlands Boulevard Clinic (RBOC)	25828 Redlands Blvd, Redlands, CA	0730-1600	909-825-7084 ext 70		
Rheumatology	3 Northeast	0800-1630	909-825-7084, ext 5		
Sleep Center	Fourth Floor	0800-1630	909-825-7084, ext 6	General questions, CPAP c.	
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Surgical Oncology	3 Northwest	0800-1630	909-825-7084, ext 1		
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Urology	2 Northwest	0800-1630	909-583-6065	1	
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Vascular Surgery	3 Northwest	0800-1630	909-825-7084, ext 2		
Womens Health	Redlands Boulevard Clinic (RBOC) 25828 Re	0800-1630	909-478-7070		

### **AVS Administrative Functions**



### **AVS Features - Administrative Functions**

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	specific clinic, and the provider.	
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### **AVS Features - Administrative Functions**



# **Poll Question**

- As a patient, what information on the AVS would be most important to you? (Pick your top 3)
  - Providers name, visit location and date and contact information
  - Updated medication list
  - Medication physical descriptions
  - Updated vitals
  - Reason for visit
  - Procedures and instructions
  - Updated problem list and diagnoses
  - Upcoming appointments
  - Laboratory and test orders
  - Laboratory and other test results
  - Clinical data charts
  - Patient education material
  - Large font size

# Lessons Learned

- Software Development Plan
- Positives
  - Rapid development
  - Small development team, local programmer
  - Feedback directly from users
  - Informal, not bureaucratic
  - Flexibility

### Lessons Learned

- Challenges
  - Feature creep/Scope bloat
  - Users are testers
  - Software bugs
  - Class III status
  - Class I approval process
    - Software changes for class I compliance
  - Requirements analysis might have missed things like medication reconciliation
  - Consistency with other patient-facing software

## **AVS - Current Status**

- Presented to VHA Innovations Selection Board for possible funding for class I development (October 2013)
- Veterans Points of Service
   Possible funding (September 2013)
- VA OI&T Region 1 approval for testing
  - September 2013
    - San Diego
  - October/November 2013
    - Long Beach, West LA, Las Vegas, Cleveland

# **AVS Evaluation**

- Veterans Assessment and Innovation Laboratory (VAIL) Patient-Aligned Care Team (PACT) Demonstration Lab
  - \$10,000 grant (September 2013)
- Evaluation Plan
  - Randomly select ~ 150 patients in primary care clinics
    - Patient satisfaction survey
    - Survey self-assessed knowledge of treatment plan

# **AVS Evaluation**

• VAIL Grant

Collect usage statistics from primary care modules

- Number of providers using AVS
- Use of optional features
- Saving and printing
- Provider preferences for using AVS
  - Patient self-assessed health status on survey
  - Provider focus group

# **Contact Information**

- John M. Byrne, D.O.
- Associate Chief of Staff for Education
- VA Loma Linda Healthcare System
- 11201 Benton Street
- Loma Linda, CA 92357
- 909-583-6004
- john.byrne3@va.gov

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- 12. Conn J. Modern Healthcare. October 25, 2012. <u>http://www.modernhealthcare.com/article/20121025/NEWS/310259956</u>, accessed May 2013

## Appendix: AVS Example

it date: 09/18/201 te generated: 09/ MA LINDA HCS		
oday's Vi	sit	
clinics Visited	<ul> <li>13:30 - Dr. Byrne, Module 4 / PROVIDE</li> <li>15:00 - Ll/Surg/Pod/Wound Limb/Wed</li> </ul>	-
Providers	GOMEZ,LAUREN M BYRNE,JOHN M	
You Were Diagnosed Vith	<ul> <li>Essential hypertension</li> <li>Obesity</li> <li>Dyslipidemia</li> <li>Cholelithiasis without obstruction</li> <li>Smoker</li> <li>Coronary arteriosclerosis</li> </ul>	<ul> <li>Ankylosing spondylitis</li> <li>Hypersomnia with sleep apnea</li> <li>Dyspnea</li> <li>Chronic obstructive lung disease</li> <li>Diabetes mellitus type 2</li> <li>Gastroesophageal Reflux Disease</li> </ul>
/itals as of his Visit	<ul> <li>Blood Pressure: 128/54</li> <li>Body Mass Index: 34.58</li> <li>Pain: 7</li> <li>Pulse Oximetry: 96 (Room Air)</li> </ul>	<ul> <li>Pulse: 66</li> <li>Respirations: 18</li> <li>Temperature: 98.1 F</li> <li>Weight: 233.7 lb</li> </ul>
mmunizations	: • FLU,3 YRS	
rom his Visit		g blood tests on the date listed for each test:

- Hemoglobin A1c (Lab) Blood
- Lipid Profile Blood Serum
- Hepatic Function Panel Blood Serum

### Other Orders

· Return To Clinic In 4 Months

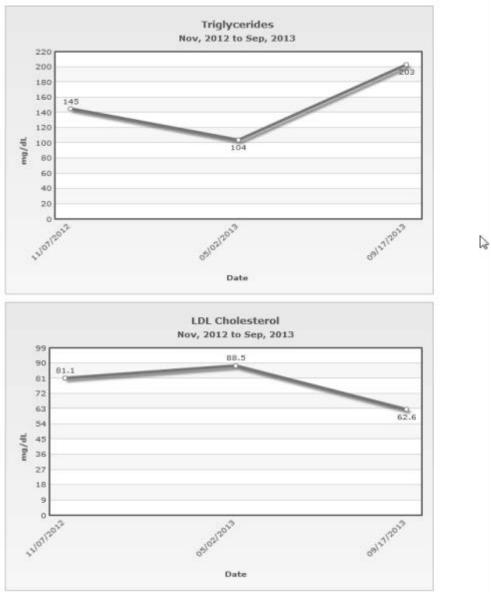
### **Important Notes**

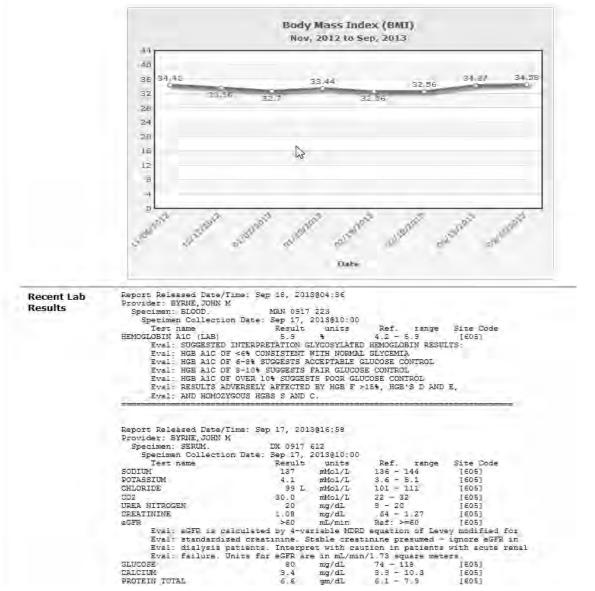
Important	Notes
Upcoming Appointments	Appointments in the next 3 months:
	12/26/2013 13:00 - Ll/Surg/Eye/Comprehensive Cl
Instructions	Monitor your blood pressure daily and keep a log.
My Ongoin	g Care
Primary Care Provider	BYRNE,JOHN M MOD 4 - PACT TEAM A
Allergies (Reactions)	Penicillin (Hives)
My Current VA Medications	The medications listed below were reviewed with you by your provider and is provided to you as ar updated list of medications. Please remember to inform your provider of any medication changes o discrepancies that you note. Otherwise, please continue these medications as prescribed.
	Accu-Chek Aviva Plus(Glucose) Test Strip USE 1 STRIP FOR TESTING EVERY OTHER DAY TO CHECK BLOOD SUGARS Refills: 2 Last Filled: December 28, 13 Expires: October 31, 14
	Aspirin 325mg Ec Tab TAKE ONE TABLET BY MOUTH DAILY WITH FOOD Refills: 3 Last Filled: December 28, 13 Expires: October 31, 14 Description: round, orange, imprinted with T,
	Glipizide 5mg Tab TAKE ONE TABLET BY MOUTH TWICE A DAY FOR DIABETES **TAKE IN ADDITION TO METFORMIN** Refills: 3 Last Filled: October 30, 13 Expires: October 31, 14 Description: round, white, imprinted with GG,771
	Lancet,Softclix USE LANCET AS DIRECTED Refills: 1 Last Filled: October 31, 13 Expires: October 31, 14
	Latanoprost 0.005% Oph Soln INSTILL 1 DROP IN BOTH EYES AT BEDTIME Refills: 5 Last Filled: October 09, 13 Expires: February 05, 14
	Lisinopril 10mg Tab TAKE ONE TABLET BY MOUTH DAILY FOR DIABETIC KIDNEYS. Refills: 3 Last Filled: January 21, 14 Expires: October 31, 14 Description: round, white, imprinted with V, 3972
	Metformin Hcl 1000mg Tab TAKE ONE TABLET BY MOUTH TWICE A DAY WITH FOOD Refills: 3 Last Filled: January 11, 14 Expires: October 31, 14 Description: oval, white, imprinted with GP,128

### Simvastatin 80mg Tab

TAKE ONE TABLET BY MOUTH AT BEDTIME FOR HIGH CHOLESTEROL Refills: 3 Last Filled: December 28, 13 Expires: October 31, 14 Description: oval, pink, imprinted with B 304, 80

My Non-VA Medications	Docosanol 10% Cream,Top SMALL AMOUNT TOPICALLY AC\T\BEDTIME
	Absorbase Dry Skin Oint, Top LIBERAL AMOUNT TOPICALLY 5 TIMES DAILY
	Aspirin (Enteric Coated) Tab,Ec 81MG MOUTH DAILY
му	Medications You Are Taking
Medications From Other VAs	Lipitor 10 MG BY MOUTH DAILY Refills: 0 Last Filled: Nov 1, 13 Expires: Jan 1, 14 Facility: Cleveland VAMC Provider: Physician,Jane Description: elliptical, white, imprinted with PD 155, 10
	Medications You Are Not Taking
	You have stated that you no longer take the following medications prescribed at other VA facilit Please remember to discuss each of these medications with your VA providers at these facilities
	Nexium 20 MG BY MOUTH ONCE DAILY Refills: 0 Last Filled: Oct 15, 13 Expires: Dec 15, 14 Facility: West Palm Beach VAMC Provider: Doc, John Q Description: purple, imprinted with 20 mg
Clinical Graphs	Weight Nov, 2012 to Aug, 2013
	220 200 185 185 195 195 185 160 140 110
	120 100 80 60
	stand stand stand stand stand stand stand stand





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DIR. BILIRUBIN ALKALINE PHOSPHATASE	0.10	mg/dL		
ALKALINE PHOSPHATASE	0.10			
		mg/aL	0.1 - 0.5	[605]
AT.T	69	IU/L	0.1 - 0.5 32 - 91	[605]
	19		17 - 63	[605]
Eval: New sexed refer	rence ranges	in effect	as of 6/7/13.	
AST	24			[605]
CHOLESTEROL	133	mg/dL	15 - 41 0 - 200	[605]
Eval: BORDERLINE ELEV				
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TRIGLYCERIDES		ma /dT.	0 - 150	[605]
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Eval: HIGH: 200-499 Eval: VERY HIGH: >5(				
HDL CHOLESTEROL		mg/dL	40 - 60	[605]
Eval: High Risk = <40				
Eval: Low Risk = >60				
Eval: Low Risk = >60 CALC LDL CHOL	62.6	mg/dL	0 - 100	[605]
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11201 BENTON ST LOMA LINDA, CA 92357-1000

11201 BENION SI LORA LINDA, CA 52357-1000

This information is meant to provide a summary of your appointment with your health care provider. If you have any questions about your care including test results, medications, diagnoses or other concerns, please contact your health care provider. Please bring this form to your next visit as a record of your medications and alert your provider to any changes in your medications.

To contact your primary care provider, please call 909-825-8084 or 1-800-741-8387 and follow the prompts to the Module where your primary care provider is located. To refill a prescription, please call 909-777-3259 or visit www.myhealth.va.gov. For care on evenings and weekends, please call 24 hour Telephone Care at 1-877-252-4866.

Access health resources. Track your health. Refill VA prescriptions. Visit **www.myhealth.va.gov**! Ask your health care team about in-person authentication and begin ordering medications and viewing appointments through MyHealtheVet. After completing in-person authentication, click on "Secure Messaging" in MyHealtheVet and select "I would like to opt in to secure messaging" in order to send email messages to your providers.