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Chronic Disease Management Programme

Note: Requires Socrates version 2.8.2.10 or later for CDM Phase 2 (which includes Opportunistic Case Findings & Prevention Programme Reviews)

1. Summary

As per your CDM Contract the following are the reviews available for GMS/GPVC patients. Further details are available on HSE website: *https://www.hse.ie/eng/about/who/gmscontracts/2019agreement/chronic-disease-management-programme/*

Opportunistic Case Finding (OCF) - An OCF review can take place every 5 years. Modified CDM (Telephone or Video Consultations) is NOT available.

The purpose of this assessment is to identify those patients at high risk of developing a Cardiovascular disease and/or Diabetes i.e. when a patient attends for another issue, risk criteria can be applied and if there is an indication an OCF assessment can be carried out on the patient.

The outcome of this assessment will be: **1** – Low risk (stay in OCF Programme); **2** – High risk (Register Patient in the Prevention Programme); **3** – Diagnosis of Chronic Disease (Register Patient in CDM).

Year	Age
2022	65
2023	45

Prevention Programme (PP) - Patients registered in the Prevention Programme will receive 1 scheduled review in a 12 month period however a PP review can take place every 9 months if required. An OCF Assessment must be submitted before you can move the patient to the Prevention Programme. Modified CDM (Telephone or Video Consultations) is NOT available.

The outcome of this assessment will be: **1** – High risk (Stay in the Prevention Programme); **2** – Diagnosis of Chronic Disease (Register Patient in CDM).

Year	Age
2022	65
2023	45

CDM – Chronic Disease Management - There are a maximum of 2 reviews in a rolling 12 month period. The 12 month period is considered to be a rolling 12 months from the date of the first review. **There must be at least 4 months between all reviews.** Modified CDM (Telephone or Video Consultations) is available.

Year	Age
2022	18

List of Chronic Diseases included:

- Diabetes Type 2 ; Asthma; Chronic Obstructive Pulmonary Disease (COPD).
- Cardiovascular Disease
  Heart Failure; Ischaemic Heart Disease; Cerebrovascular Disease (Stroke); Cerebrovascular Disease (Transient Ischaemic Attack - TIA) ; Atrial Fibrillation

A Modified Structured CDM dataset has been agreed for reviews completed remotely over the telephone / video. Once a modified review is submitted, it is not possible to add to it later to transform it into a full review.

Non Telephone reviews i.e. Structured CDM Review will consist of 2 visits (1 with Nurse / Phlebotomist and 1 with the doctor).

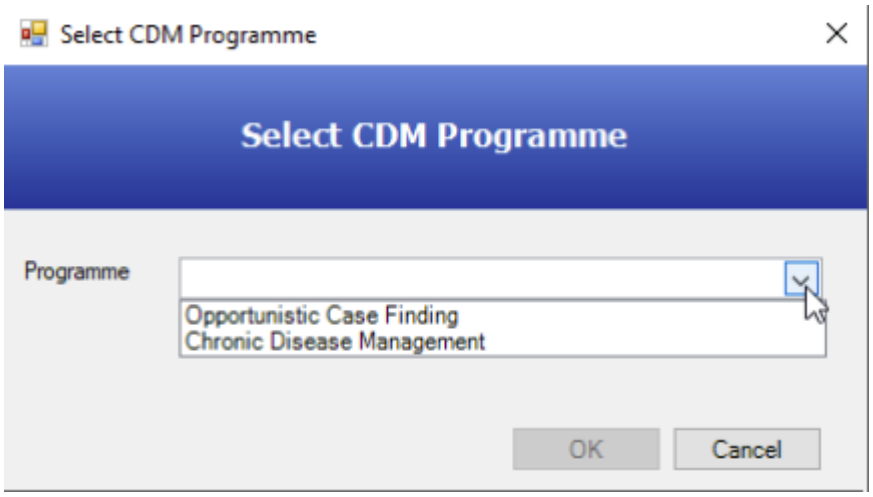
A patient can only be enrolled in one treatment programme at any point in time. E.g. OCF Programme of Chronic Disease Management.

Add CDM Programme Review in Socrates

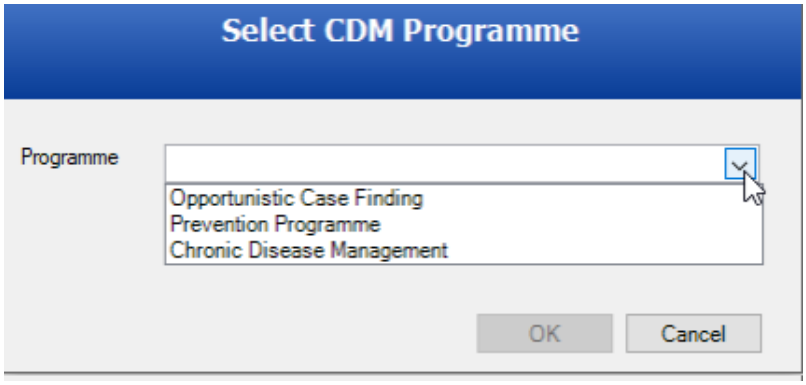
Open Consultation for the patient and click **Care Protocols**

on the left hand side menu. Select **Chronic Disease Management**. Click Add Review.

Choose the Programme from the dropdown list.

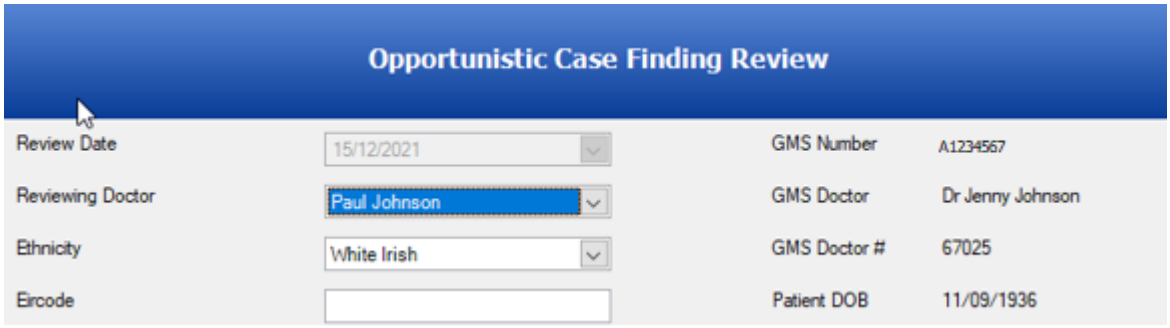


Once an Opportunistic Case Finding has been completed you can then add a Prevention Programme review.

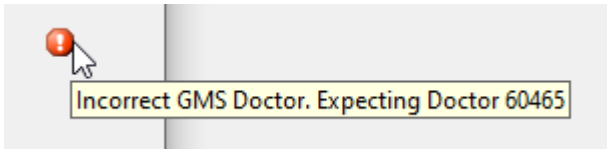


Registration

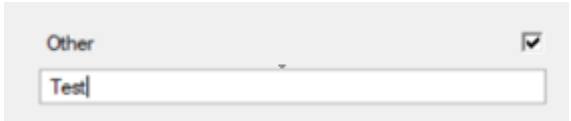
Each programme has its own Registration screen. It is important you enter the correct information on this screen. *Note: It is the medical council number of the reviewing doctor that is used to send the review via Healthlink.*



If there are any PCERS validation issues these will be highlighted with a red bubble e.g. Patients date of birth or patient is not on the doctors GMS panel. Hover over the bubble to read the message. Use the PCRS checker in Patient Registration and update the patients details, in order to proceed with the review.



Indications for OCF and PP reviews are mandatory. A red warning message will be displayed for any errors on the Registration window, e.g. if other is selected for OCF and a minimum of 10 characters has not been entered.



Review

All mandatory fields are highlighted and you can hover over the bubble message for further information.

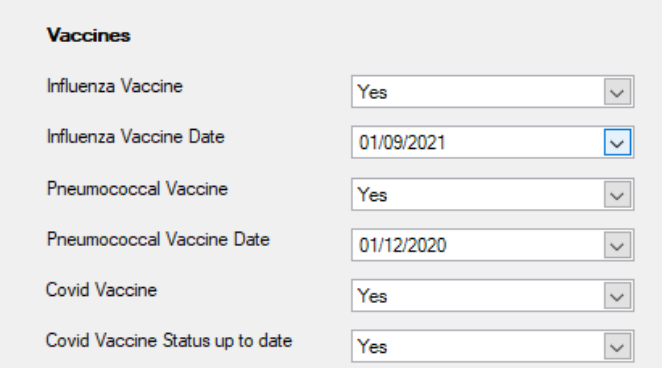
Baseline Details

Complete the fields in the review. Vitals e.g. Height, Weight, Pulse Rate etc are populated if there is a baseline detail added on the day the review is added to the patients chart. Populate the required fields and click **Save**.

Vaccinations (PP & CDM Reviews only)

Influenza and Pneumococcal vaccinations are prepopulated in the review if a 'flu' or 'Pneumoc' vaccine was recorded in the patient's chart. Ensure the spelling of your vaccines contains the above in Control Panel > Admin Console > Immunisations.

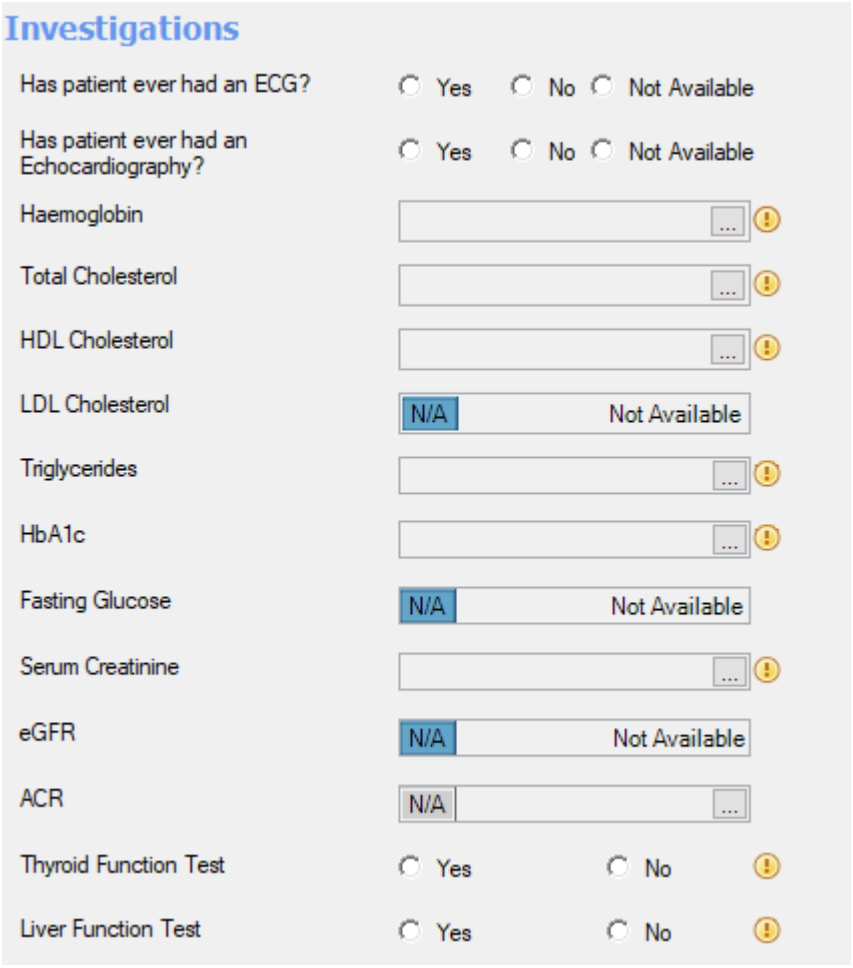
The Influenza vaccine will only populate if recorded as given in the last 12 months. The last Pneumococcal vaccine will be populated in the review.



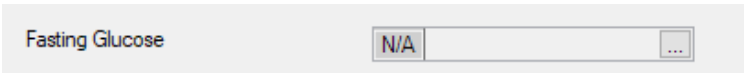
Investigations

The Investigations required will be based on the particular programme, review type and Diseases (if Chronic Disease Review) e.g. Prevention Programme Registration, CDM Annual Review (Diabetes).

If blood tests are less than 3 months old at the date of the review then blood tests do **not** need to be repeated and will be auto populated from the patients chart (if mapped). See Appendix for further details.



All mandatory fields are highlighted . If an investigation does not have a mandatory icon beside then then this field is optional e.g. Fasting Glucose in Diabetes Registration.

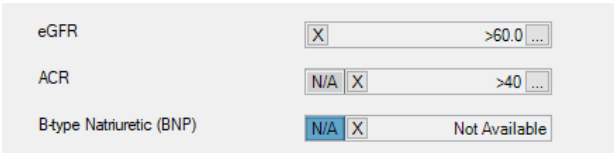


Click N/A if a result is not available from the Lab.

Click to another field to show Not Available. **Not Available** will be displayed in the field and N/A will be highlighted in blue.

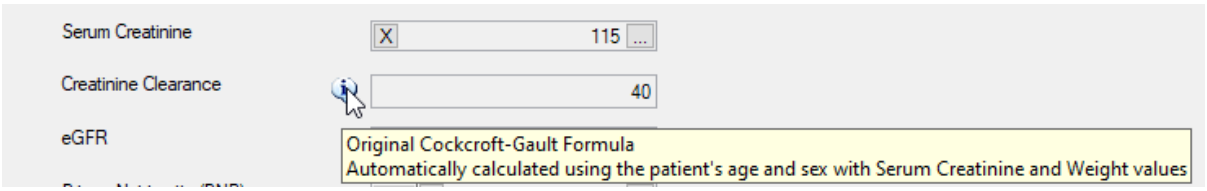
When the lab results come back from Healthlink or if already in the patients chart (less than 3 months old), they will be pre-populated in the review. If a lab result did not prepopulate, click the ellipsis

button to search for a result to send with your review. **Lab results must be within 3 months of the visit date**. See Appendix for further details.



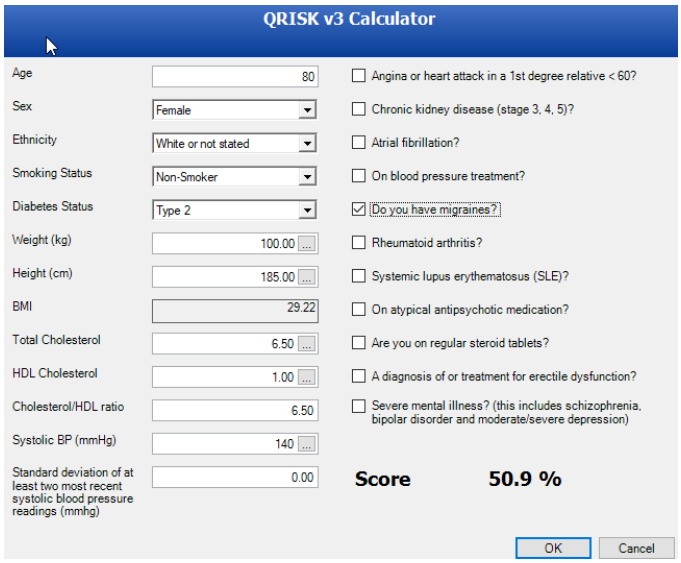
To remove a lab result from a review click the **X** and then either select a different result using the ellipsis button.

Creatinine Clearance calculator has been added for A-Fib reviews.



QRisk 3 Score

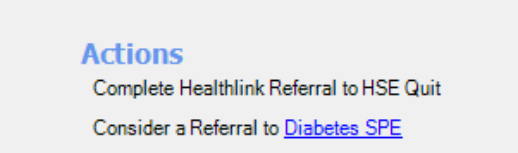
Any labs that are mapped will be automatically populated in the QRisk 3 Calculator otherwise you can search for them using the ellipsis button .



To retain a mapping, search for the result e.g. Total Cholesterol in the CDM Review (not in the QRisk Calculator).

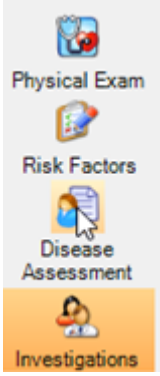
Actions (PP & CDM Reviews only)

An Actions area will be displayed in Prevention Programme and CDM reviews to remind you to complete referrals for the patient or to remind them to complete a self-referral.



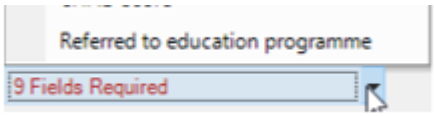
Shortcut Bar

To display a particular section on screen e.g. Lab results click Investigation on the side bar.



Required Fields

At any time, click the **Fields Required** button at the bottom of the CDM review screen to show what mandatory fields are remaining. Select a field from the list and the field chosen will be highlighted in the CDM review for completion.

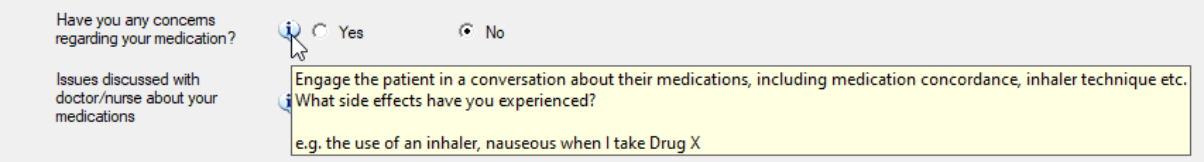


Click **Save** to record all changes. Once you have all mandatory fields completed and you click Save, the review status will go from Incomplete to Unsent and the Submit button will be enabled. Click **Submit** to submit the patients review via Healthlink.

Note: The Edit button will allow you to update the registration screen. It will only be displayed for an incomplete or unsent reviews.

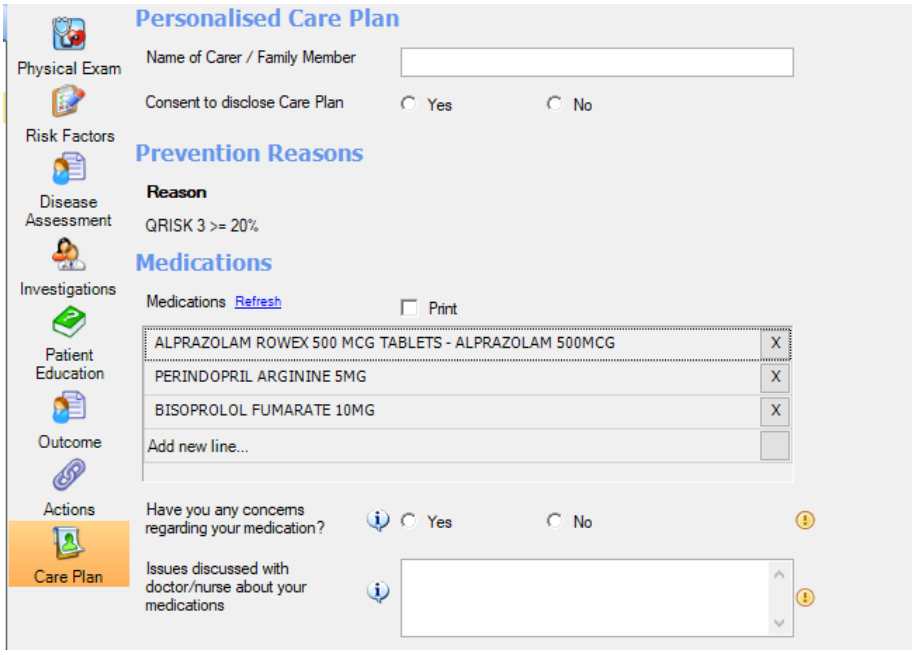
Care Plan (PP & CDM Reviews only)

Complete the **Care Plan** for the patient and print it out for the patient / carer (if applicable). All mandatory fields are highlighted with a yellow bubble . Once all these fields are completed you can Save and Print the Care Plan. Hover over the information bubbles for some additional information.



For the CDM Care Plan, if you check the box for the Self-Management Plans these will be opened in Adobe / Browser for you to print off for the patient.

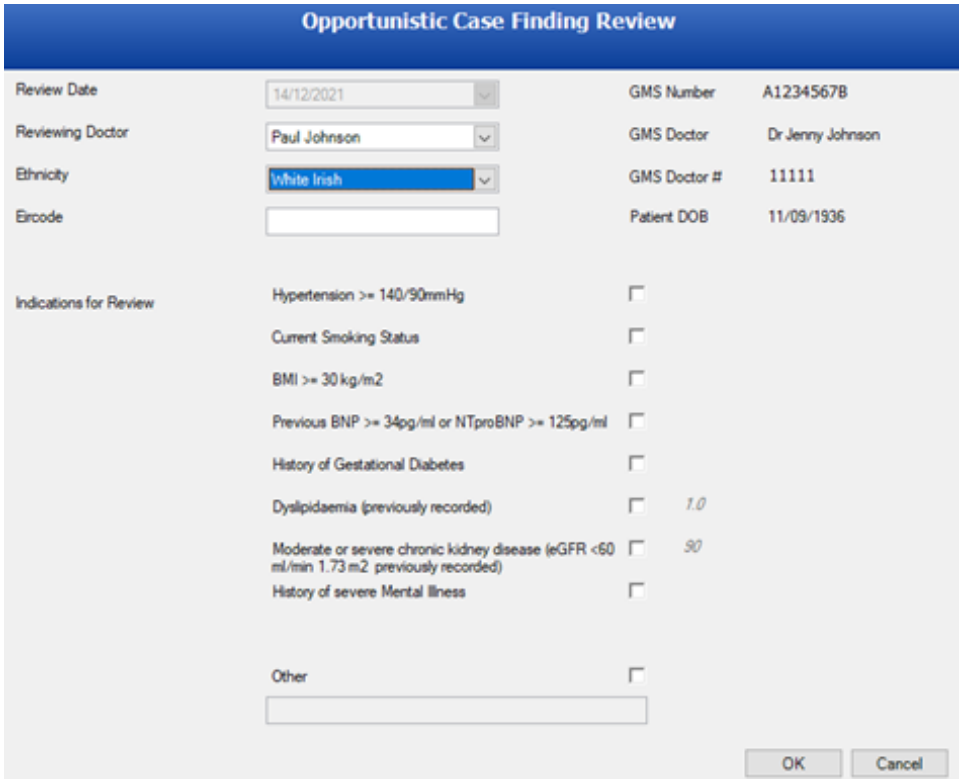
Current medications will auto populate on the Care Plan. Click the **Refresh** button to update the Medications list. Click **X** to remove a current medication from the list. You can add additional medication information by clicking into the 'Add new line' field and typing the medication details.



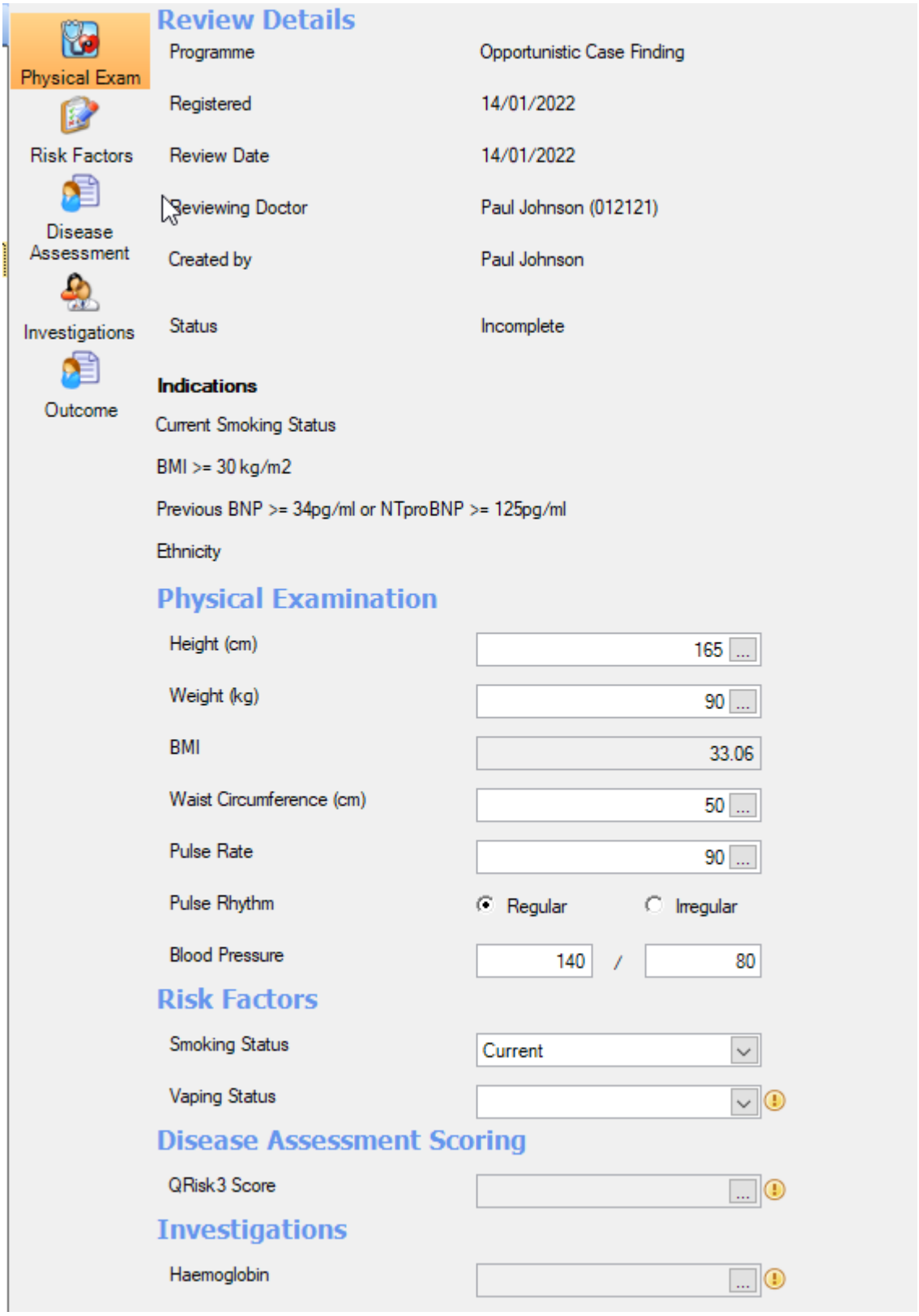
2. Programmes

Opportunistic Case Finding

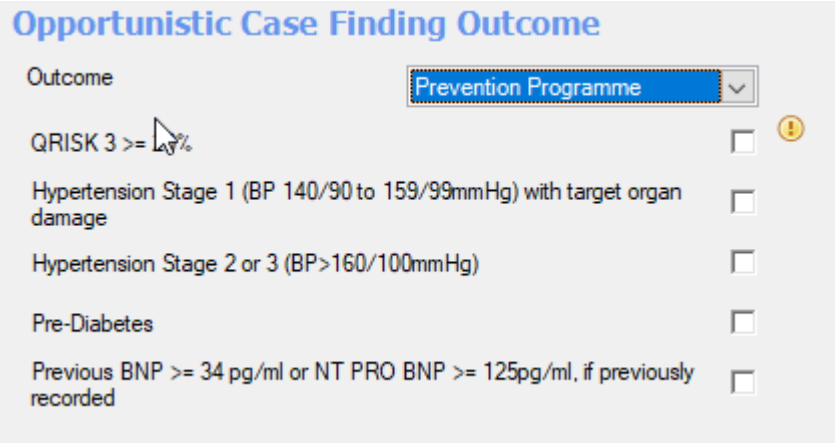
Select the reviewing doctor, Ethnicity, Eircode and the Indications for completing this OCF review, then click OK. At least one indication is mandatory.



Complete the mandatory fields for the review.

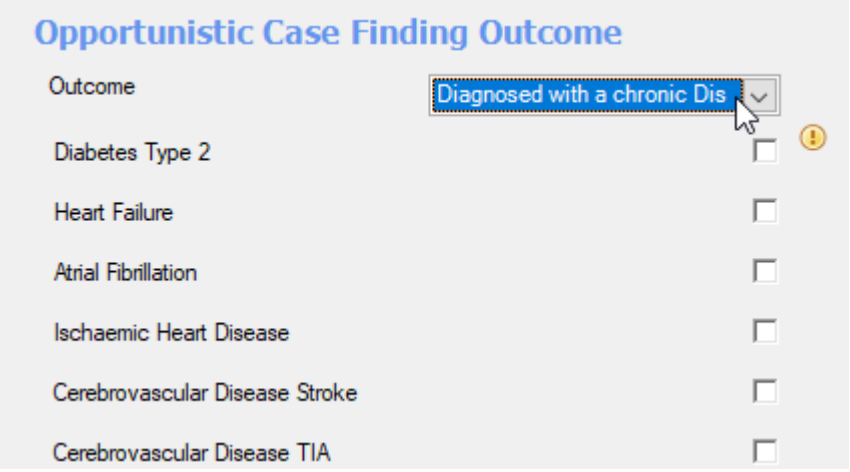

Physical Exam
Risk Factors
Disease Assessment
Investigations
Outcome
Review Details
Programme
Opportunistic Case Finding
Registered
14/01/2022
Review Date
14/01/2022
Reviewing Doctor
Paul Johnson (012121)
Created by
Paul Johnson
Status
Incomplete
Indications
Current Smoking Status
BMI >= 30 kg/m2
Previous BNP >= 34pg/ml or NTproBNP >= 125pg/ml
Ethnicity
Physical Examination
Height (cm)
165
Weight (kg)
90
BMI
33.06
Waist Circumference (cm)
50
Pulse Rate
90
Pulse Rhythm
Regular
Irregular
Blood Pressure
140
/
80
Risk Factors
Smoking Status
Current
Vaping Status
Disease Assessment Scoring
QRisk3 Score
Investigations
Haemoglobin

If the Outcome of the OCF review is for the patient to move to the Prevention Programme then you must select the reasons, which will auto populate on the Prevention Programme registration.



The next time **Add Review** is clicked Opportunistic Case Finding will not be displayed in the dropdown list as the outcome was to move the patient to the Prevention Programme.

If the Outcome of the OCF review is that the patient has a Chronic Disease then you must select the disease(s), which will auto populate on the CDM Registration.

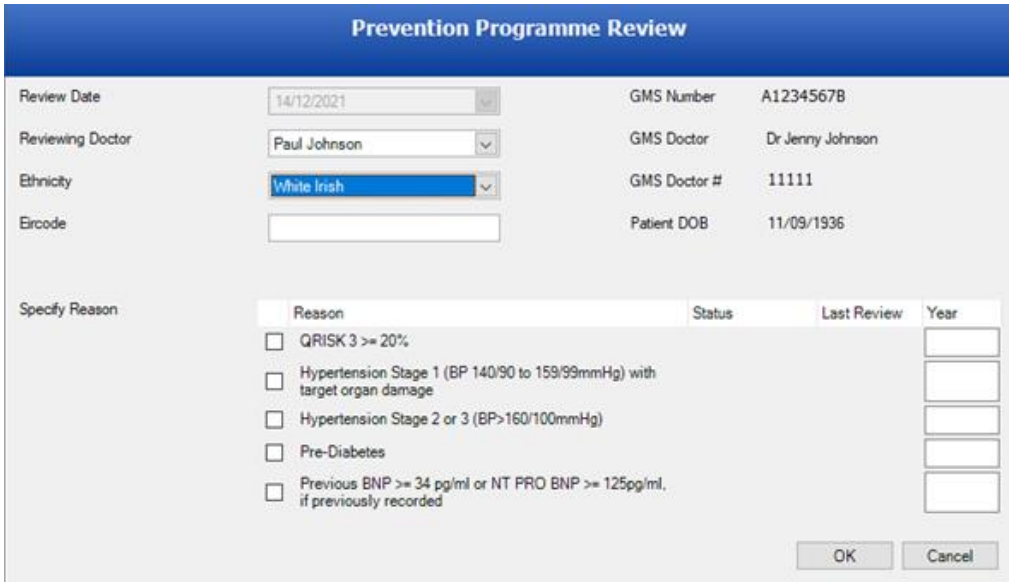


The next time **Add Review** is clicked CDM Registration will be displayed as the outcome was to register the patient on the CDM programme.

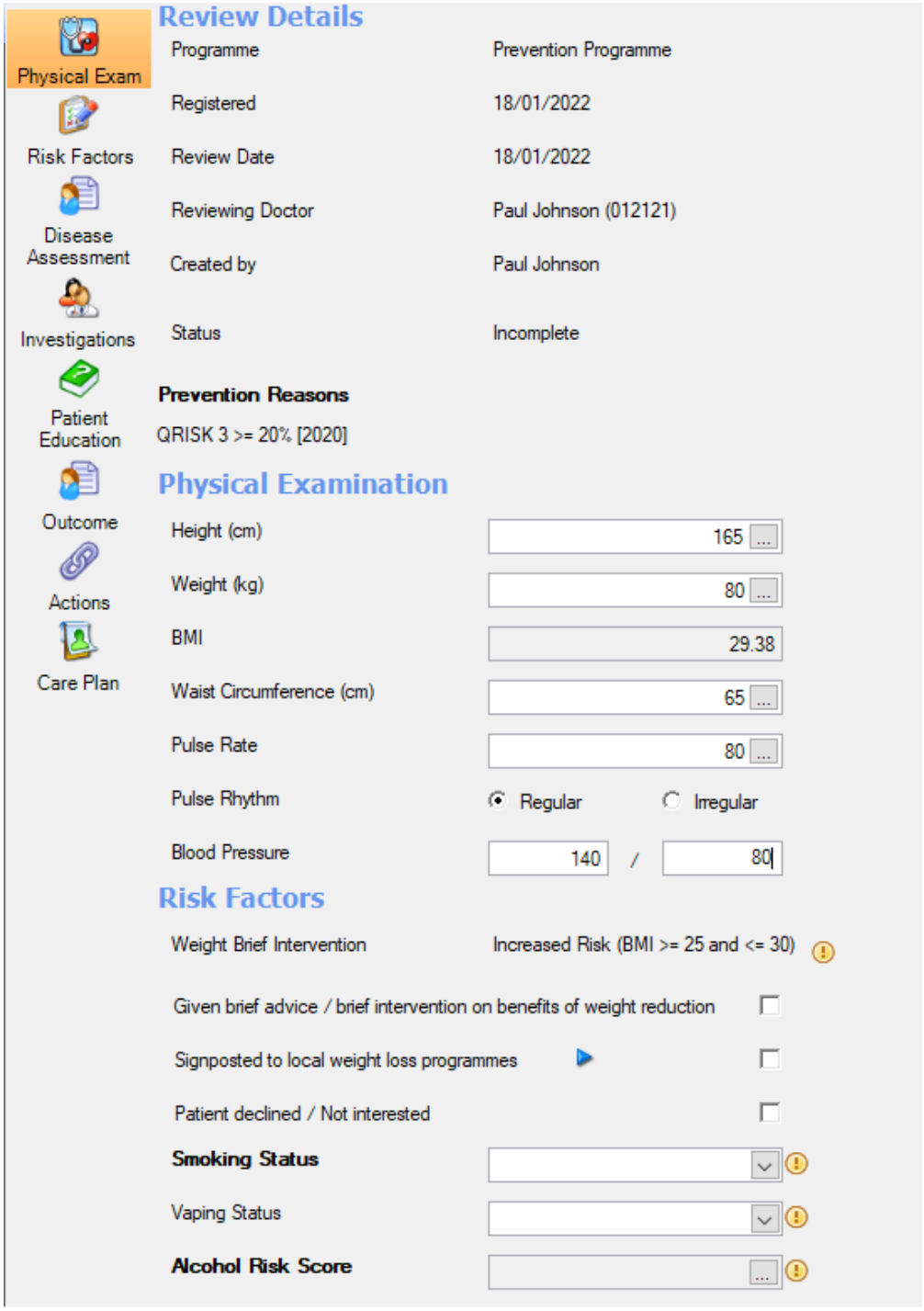
Click **Save** to record the review in the patients chart. Click **Submit** to send the review.

Prevention Programme

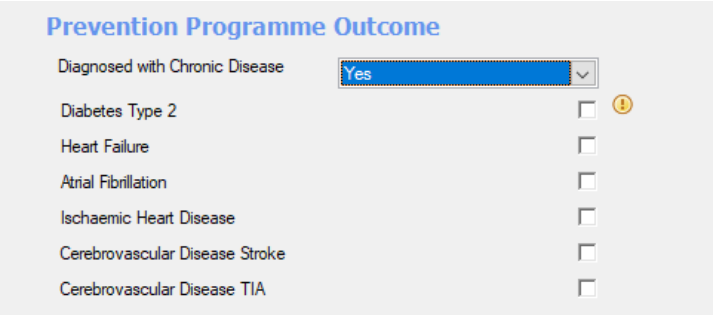
Select the reviewing doctor, Ethnicity, Eircode and the reason for completing this PP review will auto populate from the previous OCF Assessment or PP review.



Complete the mandatory fields for the review.



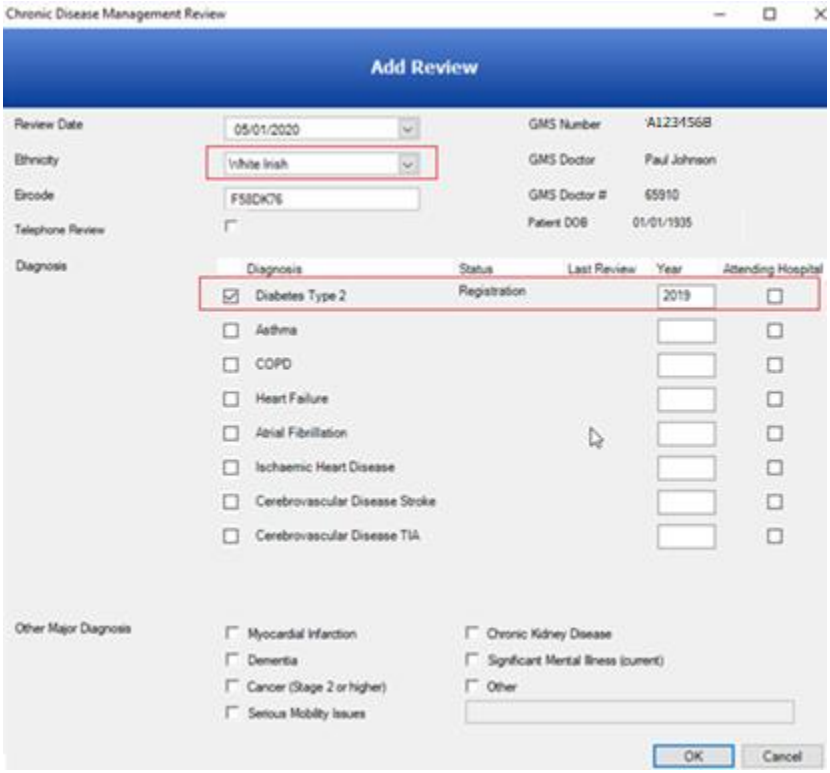
If the Outcome of the Prevention Programme review is that the patient has a Chronic Disease then you must select the disease(s), which will auto populate on the CDM Registration.



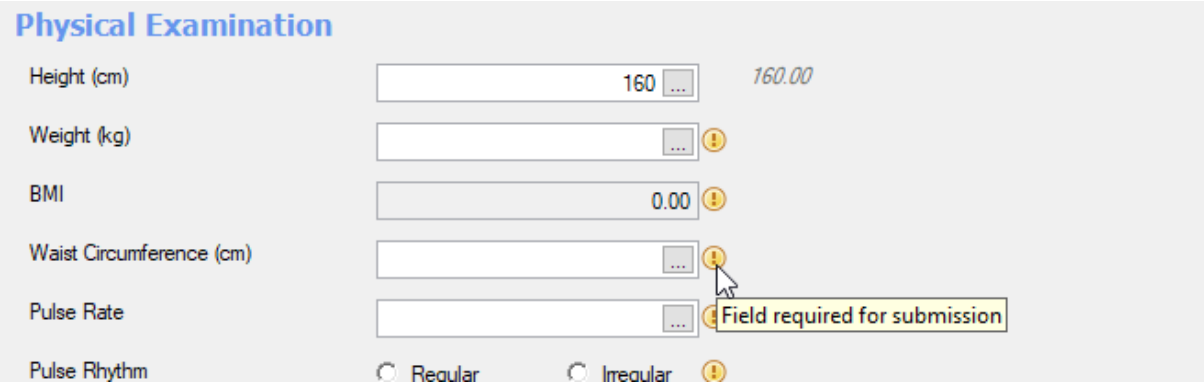
Chronic Disease Management

Select the patients ethnicity and any chronic diseases in the Registration screen. If the patient is coded with one of the chronic diseases, then these will auto populate on the Registration window. If you previously completed an OCF Assessment or PP review where the Outcome was Chronic Disease then the disease(s) selected will auto populate on the Registration window.

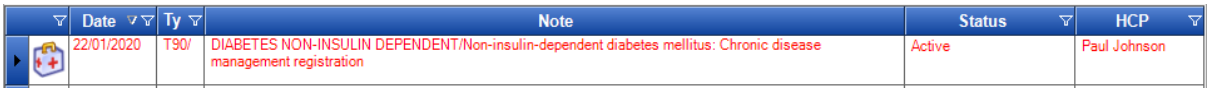
For telephone reviews ensure you check ***Telephone Review*** in order to display the specific mandatory fields for this type of review. Click OK to continue.



The mandatory fields are based on the type of review (full review in person or telephone review) and the type(s) of disease the patient is registered with.

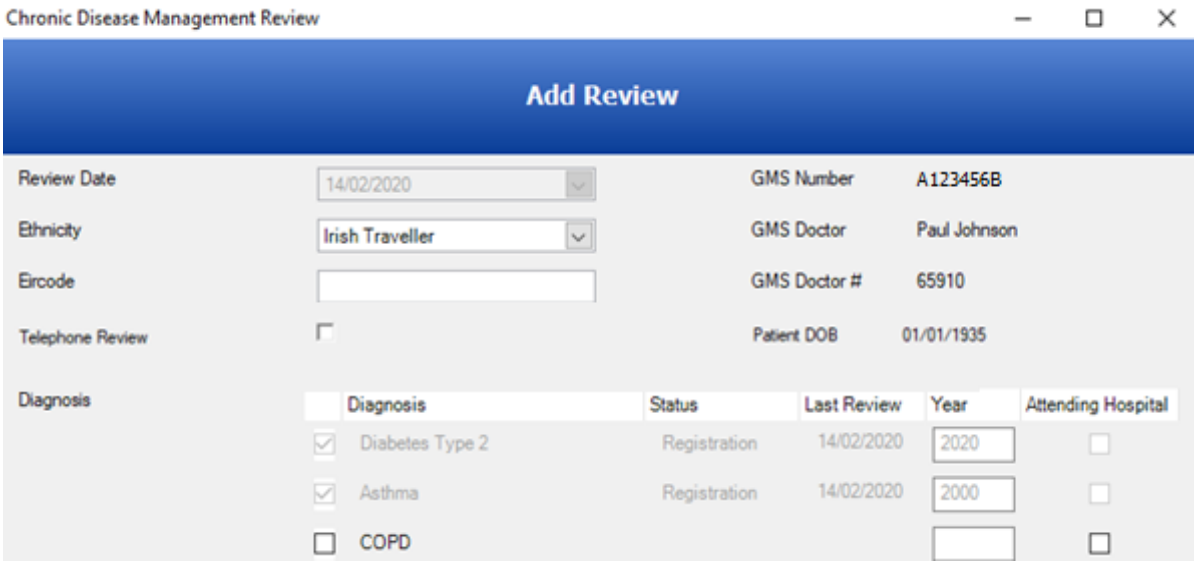


Once the review has been saved a coded note will be added for any patient who was not previously coded for their chronic disease as an active condition.



You can edit an Incomplete or Unsent review only. To add an additional diagnosis click **Edit**.

Select the new diagnosis to add to the review and click Ok.

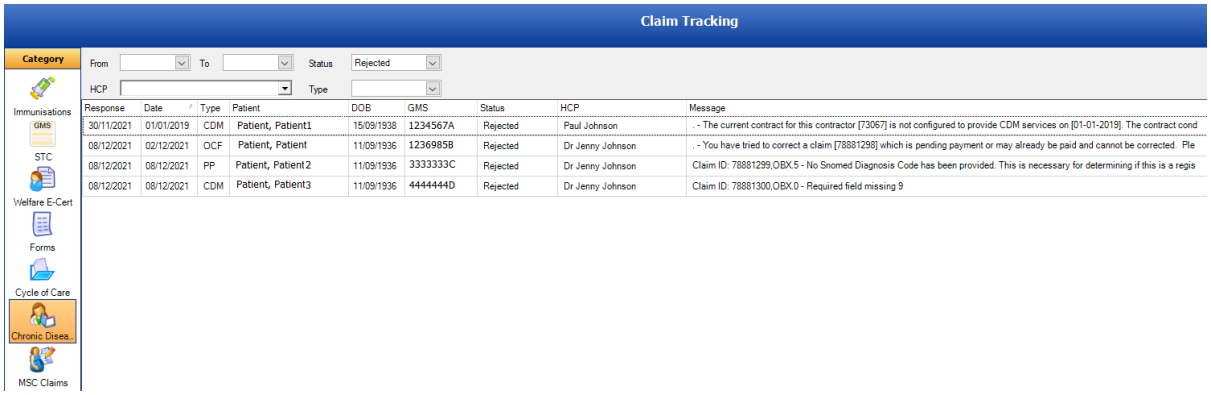


3. Message Responses

CDM response messages are downloaded during the normal process of downloading lab messages. **Communication > Lab Messaging> Download Electronic Messages.** The updated status can be viewed from the patient's chart and the Claim Tracker.

4. Control Panel > Claim Tracking > Chronic Disease

There are filters for Dates, Status, HCP and Type. View all unsent, incomplete and rejected claims to ensure all claims are submitted.



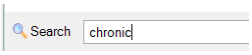
- Double click on the row to open the Consultation for the Patient selected.
- Select multiple Unsent claims and click **Submit**. If there is an issue with any of the claims these will remain in the Claim Tracker. Select each claim individually and click **Submit** to view the reason they failed to send.
- The Rejected Claim reason is displayed in the Message column.
- To **Search** either click Ctrl and F or select a row and start typing.

- If any visits cannot be resubmitted then you can archive these claims by clicking the **Archive** button at the bottom right of the screen. You can view archived visits from the Status dropdown. Archived visits can be deleted if both messages were rejected.

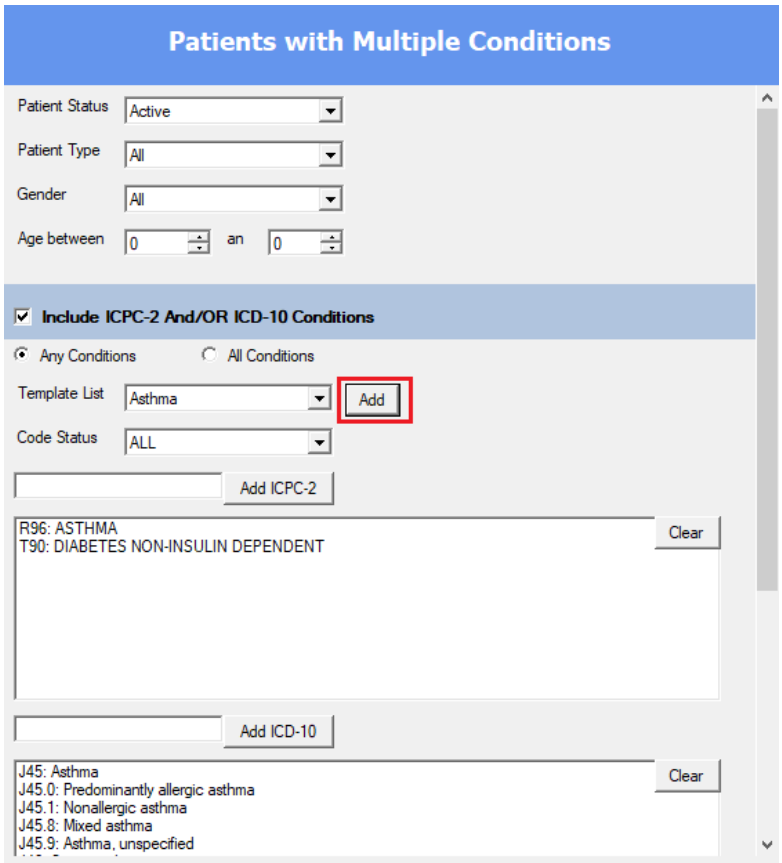
Rejected Messages

To amend a rejected claim click on the CDM Review in the list on the left-hand side and click **Save**. The claim status will return to Unsent and the Submit button will be re-enabled. Correct the claim and resubmit it. A review can only be deleted if both messages (PCRS and Clinical) were rejected.

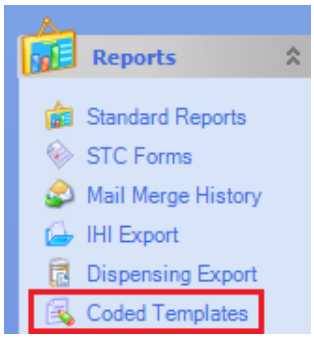
5. Reports

Open Reports > Patients sub section to view all CDM Reports. Alternatively, use the Search bar and enter the search criteria. 

To find eligible patients for CDM, you can use multiple reports including Patients with Multiple Conditions which contains the new **Coded Templates** feature. To use this feature on the report create your own Coded Templates, then you can select it from the Template List and click **Add** to populate your report.



See Quick Guide on Coded Templates for further details on this feature.



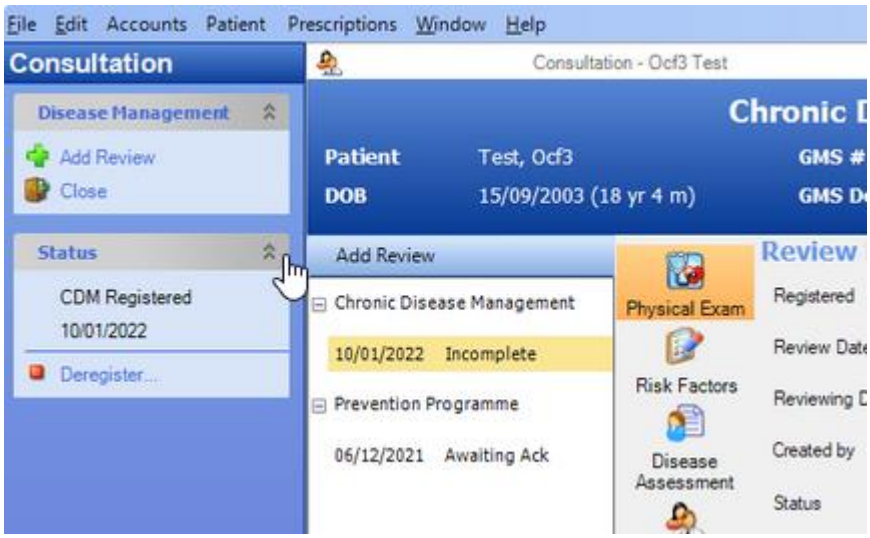
6. Appendix

Healthlink - Common error messages when submitting

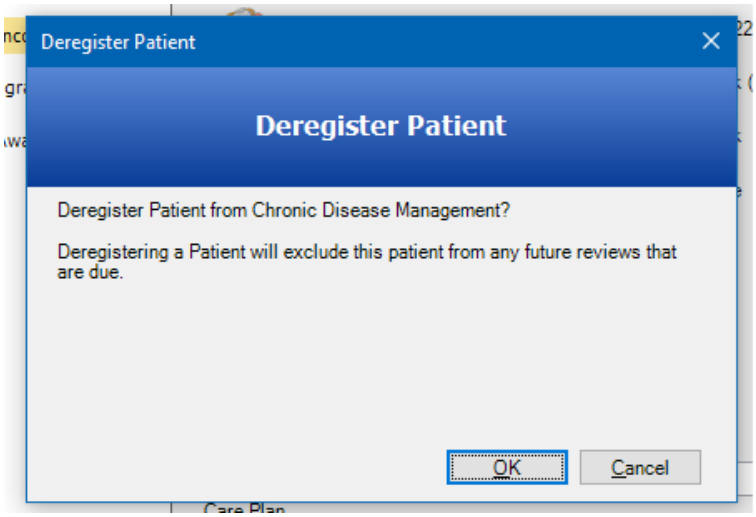
- **MSH.4 error:** Check the MCN of the patients reviewing doctor and ensure this MCN is attached to the Healthlink Certificate on the pc.
- **Contact Healthlink for any Cert issues:** Email: support.healthlink@healthmail.ie or support.healthlink@hse.ie; Ph: (01) 828-7146, -7138, -7145, -7131.

Deregister Patient

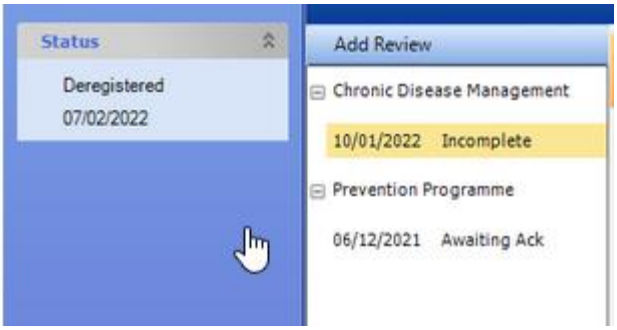
CDM registration status has been added to the explorer bar.



If a patient is no longer in the programme click **Deregister**. You will receive the following prompt to confirm you wish to proceed. Click **Ok** to continue.



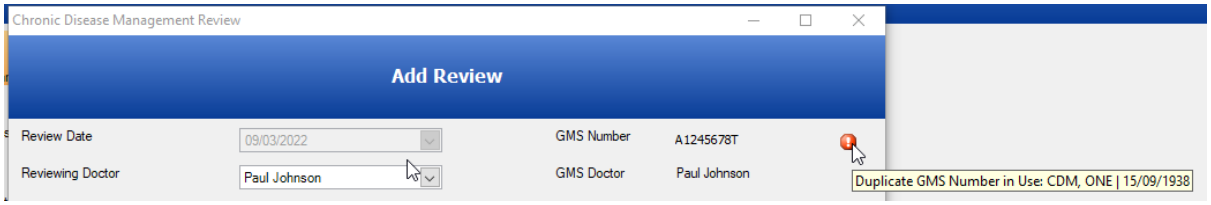
The status will show the deregistration date. The patient will no longer appear on the CDM Reviews Due report.



If an existing CDM review is updated & Saved or if a new CDM review is added, the patient CDM original registration will be re-enabled automatically.

Duplicate GMS Check

A duplicate message will be displayed when adding a CDM review if another patient has the same GMS number in their chart. You will need to update the patients charts to ensure that there is only 1 patient with the same GMS number.

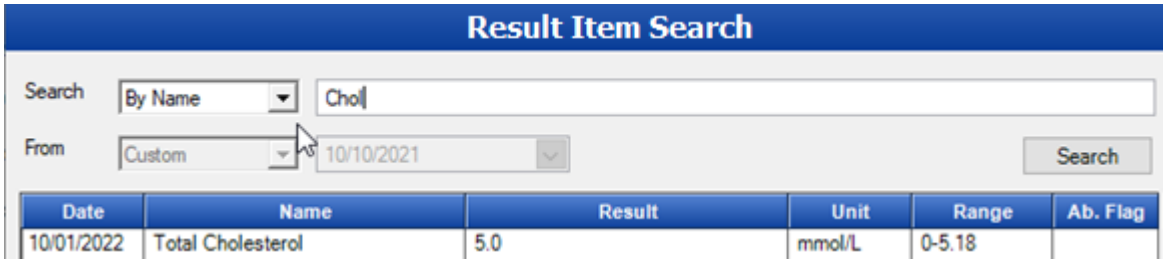


A duplicate message will be displayed when trying to submit a CDM review if another patient has the same GMS number in their chart. You will need to update the patients charts to ensure that there is only 1 patient with the same GMS number.

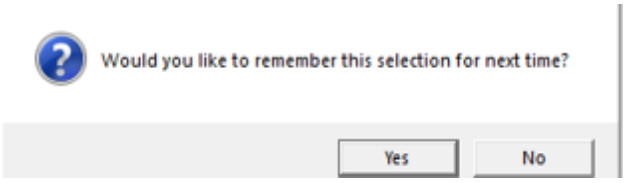
Lab Mapping

If the lab result is not automatically populated, click the ellipsis button to search for a result to send with your visit. The custom date for searching for lab results has been updated to 3 months before the review date selected. You need to select the lab results which are within 3 months of the review date.

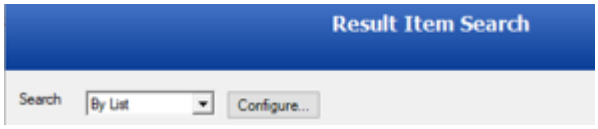
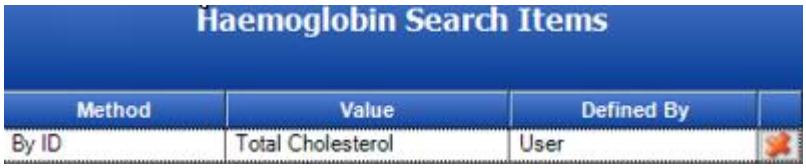
Select By Name in the Search field and enter e.g. 'Chol' in the Search field and click the Search button. Double click to select the correct result from the list.



You will receive a prompt to save this new mapping. Clicking Yes will add this mapping for future reviews for all patients.



If a lab result has been incorrectly mapped it can be removed by clicking the ellipsis button beside the Lab and then selecting 'By List' from the Search dropdown menu. Click Configure to view all mappings.



Clicking on the delete button will remove the mapping for all future reviews.