

Chart Selection for PROTECT PI-CME

Immunization for High-Risk Adults

To determine your performance in providing up-to-date immunizations for high-risk adults, you must enter a minimum of 25 patient charts reflecting this population in Stage A and a second sample of at least 25 patient charts in Stage C.

Patients selected for chart review should meet the following criteria:

- Age 19 or older as of the chart entry date
- Established in your practice for at least 12 months
- Seen on at least 1 occasion within the past 3 months for an annual physical (“check-up”) or routine follow-up of a chronic condition
- No history of anaphylaxis or life-threatening allergies that contraindicate one or more vaccines
- High-risk for vaccine-preventable infections due to one or more of the following:
 - Age 65 or older
 - Current cigarette smoker
 - Chronic pulmonary disease (i.e. asthma or COPD)
 - Chronic cardiac, kidney or liver disease
 - Sickle cell disease
 - Cancer
 - HIV/AIDS
 - Chronic alcoholism
 - Weakened immune system or receiving immunosuppressive therapy (including systemic corticosteroids)
 - Removed or dysfunctional spleen

NOTE: We suggest drawing roughly half of your selected charts from patients age 60 or older for consideration in the zoster vaccination measure.

There are many ways to select charts for data entry. To get an estimate of current performance, we suggest first choosing charts for all eligible patients seen on a specific date. The suggested index dates are shown below:

Index Date For Stage A - PROTECT PI-CME registration date.

Index Date For Stage C - Stage C start date.

Proceeding backwards from the index date, select all eligible charts from each consecutive preceding day until at least 25 charts have been selected.

For Stage C, if you have seen fewer than 25 patients who meet the selection criteria since completing your Practice Improvement Action Plan, we recommend accruing and entering eligible patient charts on a weekly basis until you have reached the 25 chart minimum.

This chart review activity will help you learn more about performance measurement. It will also provide insight into strengths as well as opportunities to improve immunization services. Completing multiple chart reviews will allow you to detect trends and see how changes in office structure, processes and resources affect immunization delivery.

***Results from your individual chart reviews are for your personal use
and will not be reported elsewhere.***

Chart Selection Guide for PROTECT PI-CME

Adolescent Immunization – Focus on 11-12-year-old Immunizations

Overview

For this activity, you will review charts of established 13-year-old patients to explore immunization patterns for your 11- and 12-year-old patients relative to ACIP recommendations.¹ In Stage A, you must enter data from a minimum of 20 patient charts meeting the selection criteria below to determine your baseline immunization performance. After you have implemented your Stage B Action Plan, you will reassess your performance using a second sample of at least 20 different patient charts in Stage C.

☞ The minimum interval for implementing your Stage B Action Plan is 30 days.

Chart Selection Criteria

Adolescents whose charts are selected for data entry should meet the following criteria:

- **Stage A:** Had their 13th birthday within the past 24 months
- **Stage C:** Had their 13th birthday since you began Stage B of this PI-CME program
- Established in your practice on or before the 12th birthday
- Seen on at least 1 occasion during the year prior to the 13th birthday
- No history of anaphylaxis or life-threatening allergies that contraindicate one or more vaccines

NOTE: We suggest drawing roughly half of your selected charts from female patients for consideration in the HPV vaccination measure.

Identifying Eligible Patient Charts for Stage A

There are many ways to select charts for review. To get an estimate of current performance and to reduce potential selection bias, we suggest using your daily patient schedule to help identify eligible patients.

- Choose an **Index Date** that reflects care occurring before this activity such as the day you registered for this PROTECT PI-CME program.
- Identify all eligible patients seen on your selected **Index Date** for chart review.
- Proceeding backwards, select all eligible patients seen on each preceding day until at least 20 are available for chart review.

¹ CDC. Recommended immunization schedules for persons aged 0--18 years---United States, 2010. MMWR 2010;58(51&52).

Identifying Eligible Patient Charts for Stage C

In Stage C, you should use a similar approach for chart selection. Patients seen since you submitted your Action Plan in Stage B are strongly preferred.

- Establish a date on or after the day you began Stage B as your **Index Date**.
- When you have entered Stage C and are ready to pull charts for review, first choose all eligible patients seen on that day for chart review.
- Proceeding backwards up to the Index Date, choose all eligible patients seen on each preceding day until you have at least 20 charts available for review.
 - *For example, if you submitted your Performance Improvement Action Plan (Stage B) on November 1st, you would not use any schedules before November 1st to identify eligible patients.*

Accruing Charts for Stage C

Some participants may find that they reached Stage C, but do not yet have 20 eligible patients who have recently turned age 13. If this occurs, we recommend that you accrue and enter eligible patient charts weekly until you have reached the 20 chart minimum. You may use one or both of the following strategies:

- As you continue to see patients, select all eligible 13-year old patients for chart review.
- You may also create a list of otherwise eligible patients who will soon be turning age 13 and abstract their chart data as they reach their 13th birthday. Patients whom you have seen at least once since your last review cycle are strongly preferred.

These chart selection instructions have been adapted from the Immunizations for Adolescents measure in the Healthcare Effectiveness Data and Information Set (HEDIS®). Since the purpose of the chart reviews in this program are to meet educational objectives and not for official HEDIS data collection and reporting purposes, the chart review process has been modified for this context.

This chart review activity will help you learn more about performance measurement. It will also provide insight into strengths as well as opportunities to improve immunization services. Completing a subsequent chart review will allow you to detect trends and see how changes in office structure, processes and resources affect immunization delivery.

***Results from your chart reviews are for your personal use.
Individual results will not be reported elsewhere.***

This Chart Selection Guide was designed specifically for use in the PROTECT™ PI-CME program. This document may not be used beyond the scope of this activity without prior written permission of the University of Nebraska Medical Center (UNMC) Center for Continuing Education.

Chart Selection Guide for PROTECT PI-CME

Early Childhood Immunization

Overview

For this activity, you will review charts of established 2-year-old patients to explore immunization patterns for your established young patients. In Stage A, you must enter data from a minimum of 20 patient charts meeting the selection criteria below to determine your baseline immunization performance. After you have implemented your Stage B Action Plan, you will reassess your performance using a second sample of at least 20 different patient charts in Stage C.

- 👉 The minimum interval for implementing your Stage B Action Plan is 30 days.
- 👉 **Pediatricians:** If you are an ABP Diplomate and seeking ABP Maintenance of Certification (MOC) credit for this activity, you must complete 2 or more Stage C chart review cycles.

Chart Selection Criteria

Young children whose charts are selected for review should meet the following criteria:

- **Stage A:** Had their 2nd birthday within the past 24 months
- **Stage C:** Had their 2nd birthday after the **Index Date** (*see below*)
- Established in your practice on or before the 1st birthday
- Seen on at least 1 occasion during the year prior to their 2nd birthday
- No history of anaphylaxis or life-threatening allergies that contraindicate one or more vaccines

Identifying Eligible Patient Charts for Stage A

There are many ways to select charts for review. To get an estimate of current performance and to reduce potential selection bias, we suggest using your daily patient schedule to help identify eligible patients.

- Choose an **Index Date** that reflects care occurring before this activity such as the day you registered for this PROTECT PI-CME program.
- Identify all eligible patients seen on your selected **Index Date** for chart review.
- Proceeding backwards, select all eligible patients seen on each preceding day until at least 20 are available for chart review.

Identifying Eligible Patient Charts for Stage C

In Stage C, you should use a similar approach for chart selection. Patients seen since you submitted your most recent chart review are strongly preferred.

When you have entered Stage C and are ready to pull charts for review, first choose all eligible patients seen on that day.

- Establish a date on or after the day you began Stage B as your **Index Date**.
- Proceeding backwards up to the Index Date, choose all eligible patients seen on each preceding day until you have at least 20 charts available for review.

- ☞ If you are doing a second Stage C chart review cycle for ABP MOC credit, you will use this same chart selection process, but instead use the date you submitted your initial Stage C chart review data as the **Index Date**.

Accruing Charts for Stage C

Some participants may find that they have reached Stage C, but do not yet have 20 eligible patients who have recently turned age 2. If this occurs, we recommend that you accrue and enter eligible patient charts weekly until you have reached the 20 chart minimum. You may use one or both of the following strategies:

- As you continue to see patients, select all eligible 2-year old patients for chart review.
- You may also create a list of otherwise eligible patients who will soon be turning age 2 and abstract their chart data as they reach their 2nd birthday. Patients whom you have seen at least once since your last review cycle are strongly preferred.

These chart selection instructions have been adapted from the Childhood Immunization Status measure in the Healthcare Effectiveness Data and Information Set (HEDIS®). Since the purpose of the chart reviews in this program are to meet educational objectives and not for official HEDIS data collection and reporting purposes, the chart review process has been modified for this context.

This chart review activity will help you learn more about performance measurement. It will also provide insights into strengths as well as opportunities to improve immunization services. Completing multiple chart review cycles will allow you to detect trends and see how changes in your office structure, processes and resources affect immunization delivery.

***Results from your chart reviews are for your personal use.
Individual results will not be reported elsewhere.***

**This Chart Selection Guide was designed specifically for use in the PROTECT™ PI-CME program.
This document may not be used beyond the scope of this activity without prior written permission of
the University of Nebraska Medical Center (UNMC) Center for Continuing Education.**