Set up CDM plan prompts

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The Chronic Disease Management (CDM) module prompts doctors to create plans for patients who may be eligible for CDM Medicare items. This guide explains the steps required to add triggers for these plans when patients present with eligible problems. To learn how to use the CDM module, see the user guide.

Overview

Configuring the module

For the module to work efficiently, the following setup steps should be performed:

- Associate the relevant document templates with the Medicare CDM items.
- Link recalls to these items where relevant.
- Switch the CDM module on for either the whole practice or individual doctors.
- Identifying problems that trigger the CDM module to notify the doctor (when in a patient record) that the patient may be eligible for one or more CDM items. These problems will need to be configured with the appropriate trigger.

Configuring problems

For the CDM module to trigger CDM Medicare items, two sets of problems need to be identified and configured: Problems to trigger the **Mental Health** items and problems to trigger **GP Management Plan** items. Each problem type is further defined using either ICPC2+ or free text (via Zedmed or another application).

The following sections explain how to link problems to CDM Medicare items, so a plan is triggered when a problem is identified.

> **Important**: The CDM Module eligibility criteria and automatic prompts rely (in some instances) on whether or not patient records contain certain current problems. If practices do not consistently define problems for patients, the efficacy of this function will be impeded.

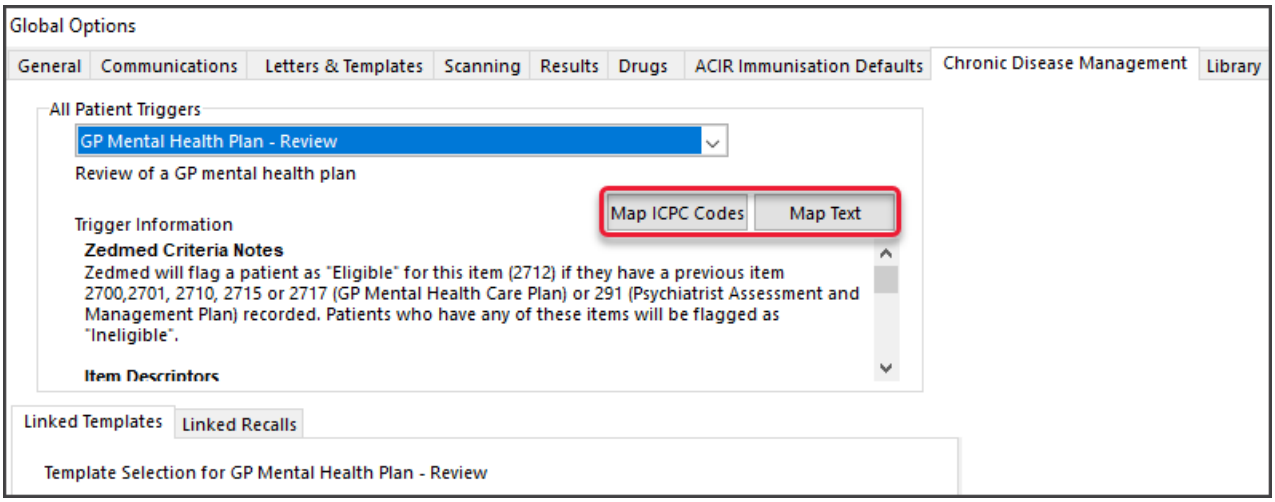
Link mental health problems to mental health items

The section explains how to map both the free-text defined problems and the ICPC2+ defined problems, as there is nothing relevant to Mental Health in the ICPC2+ grouper.

To link the mental health problem:

1. Go to Clinical and select **Global Options** > **Chronic Disease Management** tab.
2. Choose a Mental Health item from **All Patient Triggers.**
3. Select **Map ICPC Codes** or **MAP Text** and follow the applicable section below.
    - **Map ICPC Codes** is for mapping ICPC2+ generated problems to Mental Health Items.

- **Map Text** is for mapping the free text-generated problems to Mental Health Items.



The MAP ICPC button

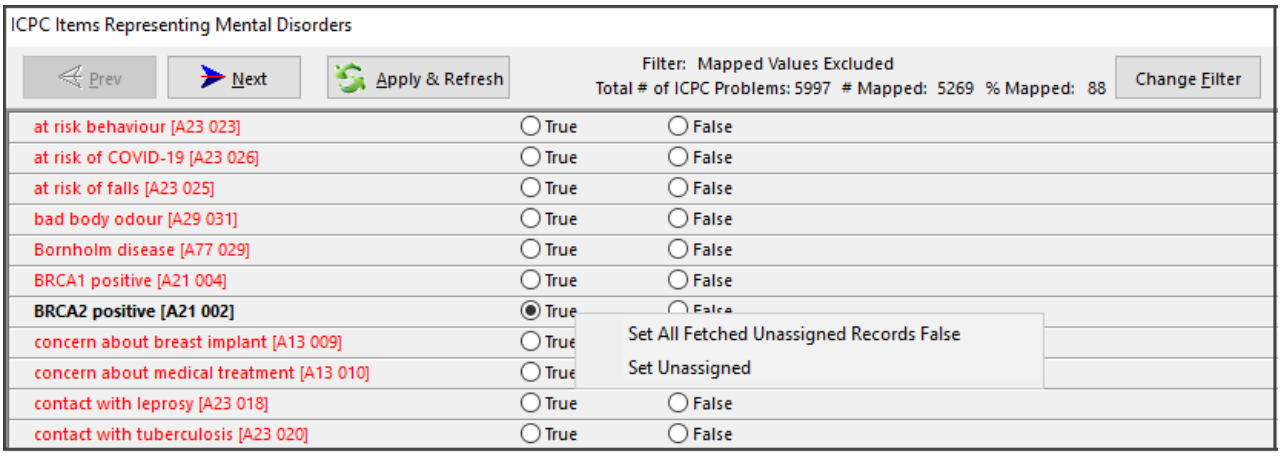
Selecting **Map ICPC Codes** displays the screen below.

All ICPC2+ diagnosis codes available are listed and can be set as **True** or **False**:

- **True -** the problem will trigger the CDM Module for a patient assigned this problem via ICPC2+.
- **False** - the problem will NOT trigger the CDM Module for a patient assigned this problem via ICPC2+.

To save any settings, select the **Apply and Refresh** button (**before** selecting **Next** or **Previous** to see another page). To remove a setting (i.e. reset to Unassigned), right-click the relevant radio button and select **Set Unassigned**.

You can set all unassigned problems to **False** by right-clicking a radio button then left-clicking **Set all fetched unassigned records false** and then modify any that should be **True** by clicking the relevant radio button.

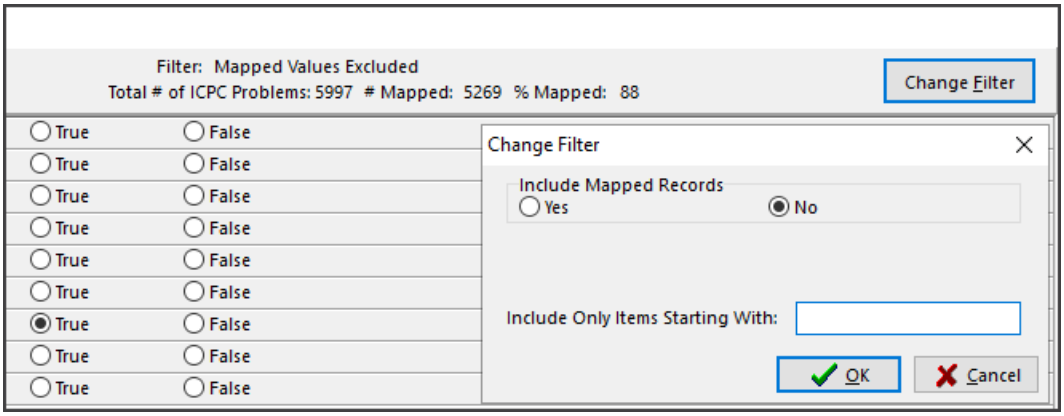


The top totals show the number of problems to be mapped, problems currently mapped and the percentage of problems mapped.

MAP ICPC - Change Filter button

Allows you to change the filter to display different problems. The default setting is to exclude problems that are already mapped. This can be changed to include the mapped problems for review and possible modification by selecting the **Yes** radio button in the **Include Mapped Records Box**. Problems starting with a particular letter can be displayed if there is a particular problem/s that the user wishes to review.

Zedmed has default mappings of ICPC2+ Mental Health problems, which can be reviewed and modified by each practice in this way.

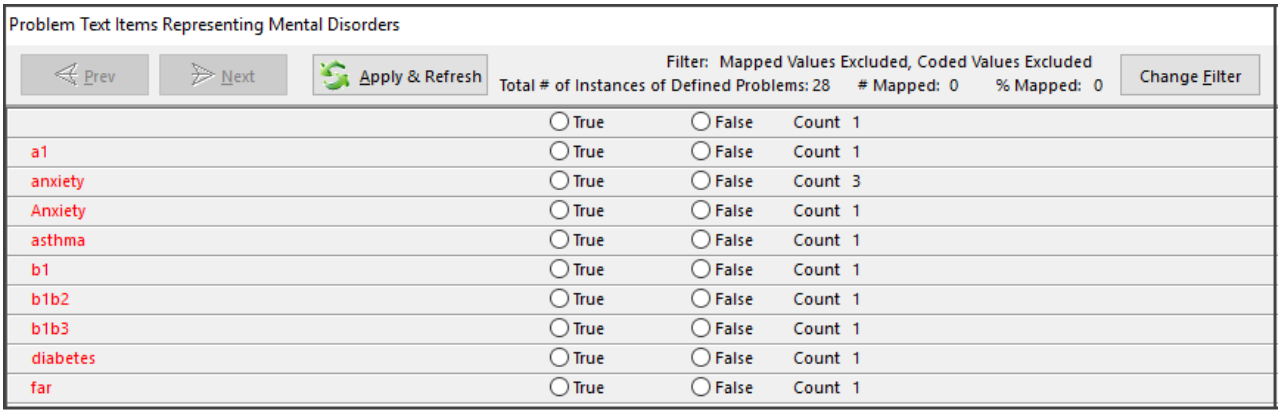


Important: If your filter is set to exclude mapped problems (this is the default setting), the mapped records will disappear from the display when you click on **Apply** and **Refresh**.

The MAP Text button

This button is used to map defined problems using free text. Selecting this button displays the free text problems that have been assigned to patients in Zedmed Clinical at this practice.

The problems are listed based on the number of times the problem has been assigned, ensuring the problems are mapped to the most frequently used first. The problems can be set to **True** or **False** to trigger the CDM module when a patient is assigned the problem, as described above.

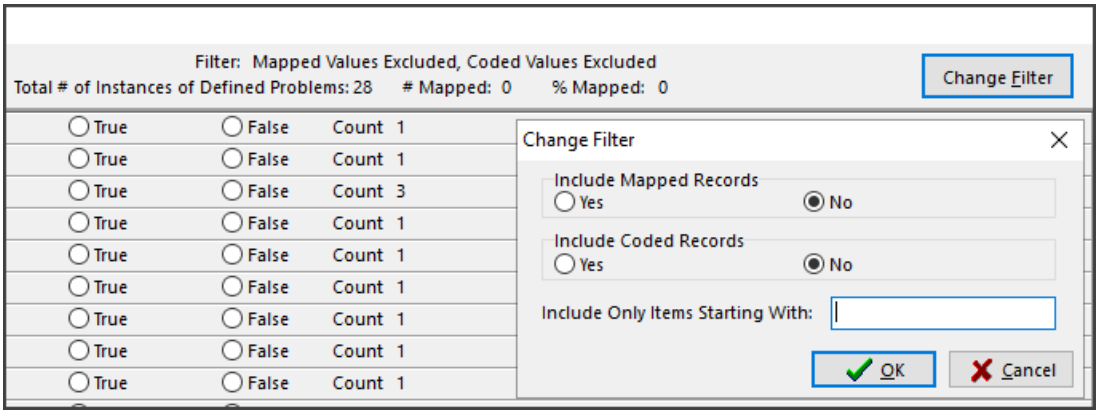


The totals at the top show the total number of records assigned to patients. This means every time a problem is assigned to a patient the count increases by one. The **# Mapped** and **% Mapped** show the number and percentage of defined problems that have been mapped.

The **Change Filter** for the Map text button.

Allows the user to display the mapped records (the default is to show the Free Text problems that have not been mapped), and to either/or show ICPC coded problems that have been assigned to patients.

In all cases there is the option to filter the problems displayed to those starting with a particular letter. This is to assist the user to locate a particular problem or group of problems.



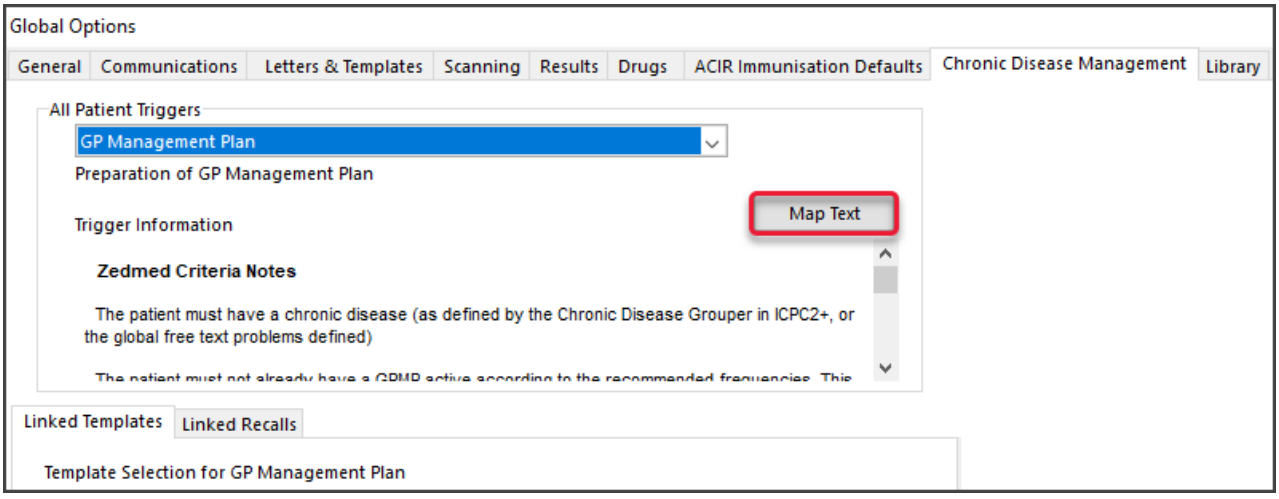
Link chronic diseases to GPMPs/GPMP reviews

The section explains how to set up a chronic disease problem to trigger a GP Management Plan or a GP Management Plan review. The ICPC2+ grouper has a grouping relating to this category of problems. This means that any problems defined for patients using ICPC2+ will be automatically set to trigger (or not) the CDM Module according to this grouper.

To link chronic diseases:

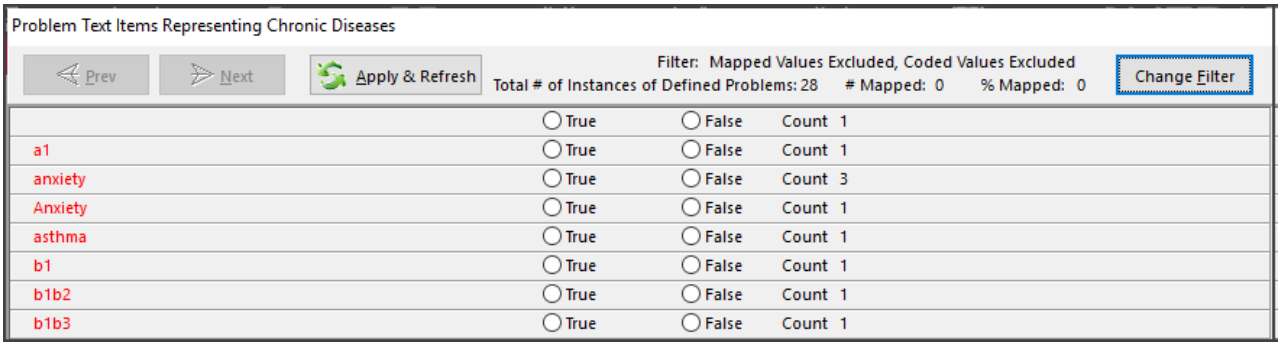
1. Go to Clinical and select **Global Options** > **Chronic Disease Management.**
2. Choose a chronic disease from **All Patient Triggers.**
3. Select **MAP Text** to display the free text problems that have been assigned to patients in Zedmed Clinical at this practice.
4. Select **True** or **False** to trigger the CDM module when a patient is assigned the problem.
   - **True -** the problem will trigger the CDM Module for a patient assigned this problem via ICPC2+.
   - **False** - the problem will NOT trigger the CDM Module for a patient assigned this problem via ICPC2+.
5. To save any settings, select the **Apply and Refresh** button (before selecting **Next** or **Previous** to see another page).

   To remove a setting (i.e. reset to Unassigned), right-click the relevant radio button and select**Set Unassigned**.



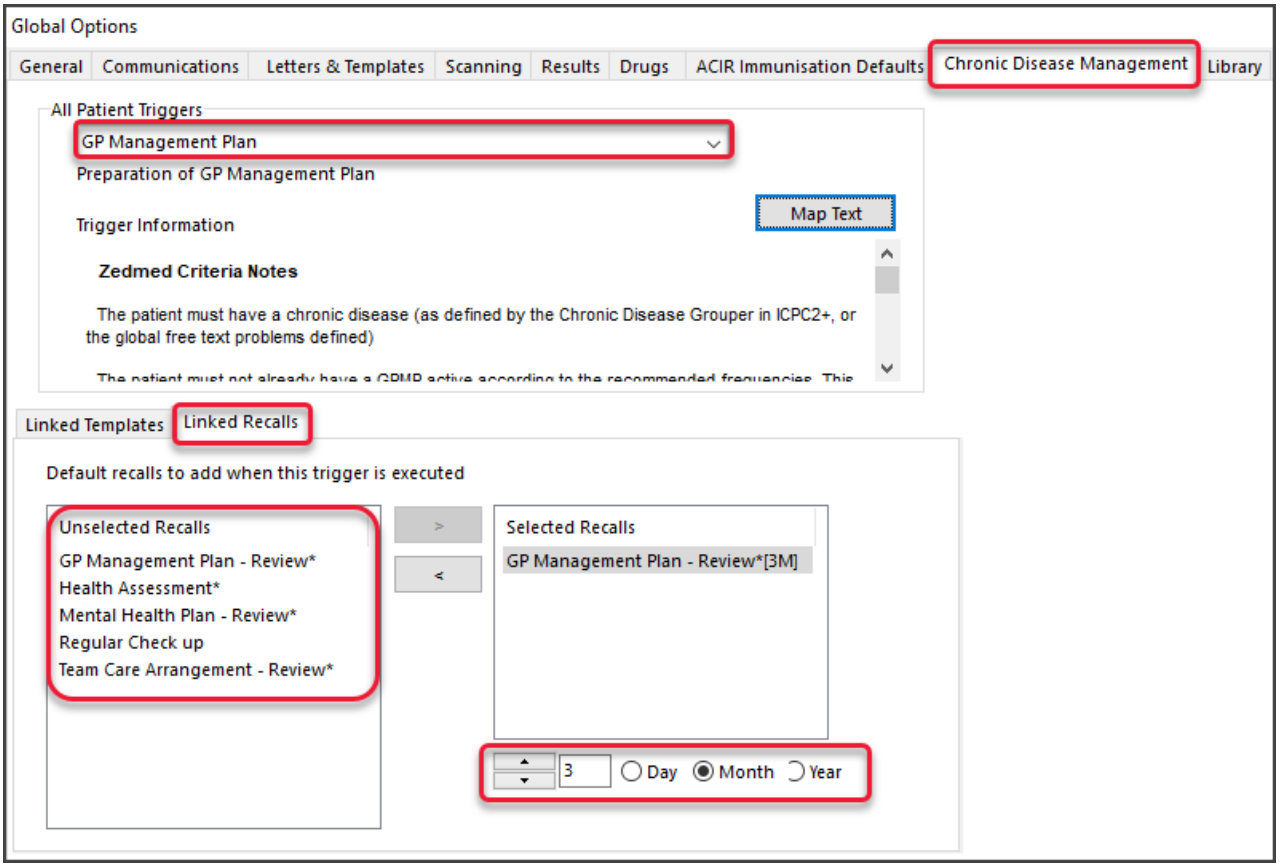
The problems are listed based on the number of times they have been assigned, ensuring the problems are mapped

to the most frequently used ones first. **The totals** at the top show the total number of records assigned to patients. This means every time a problem is assigned to a patient the count increases by one. The **# Mapped** and **% Mapped** show the number and percentage of defined problems that have been mapped.



Set up Recalls

Relevant recalls can be linked to individual items in a similar way to the linking of relevant document templates.

To set up a recall:

1. Choose a patient trigger from the drop-down list.
2. Select the **Linked Recalls** tab.
3. Under **Unselected Recalls,** select the recall required.
4. Select the arrow pointing right to move the template to the **Selected Recalls** list.
5. If the default maturity period is not suitable for CDM purposes, select the Day, Month, or Year radio button and enter the required number.