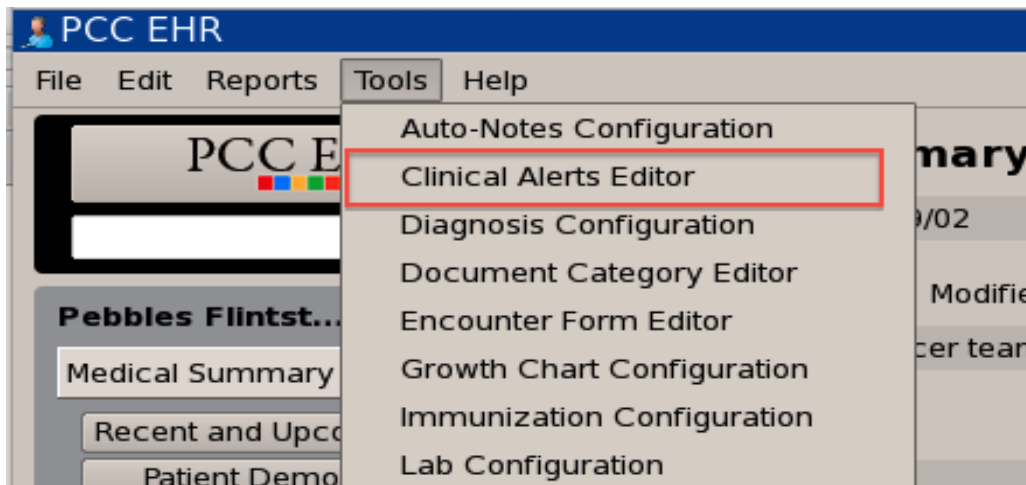**Factor 5: Gives the patient/family a clinical summary at each relevant visit**

PCC EHR has the ability to prompt the user with "Clinical Alerts" which, in this case, would be useful for reminding the clinician to review the Care Plan and generate a written clinical summary for high risk patients or patients with chronic illness. The clinical alert can be configured to appear when you open and/or save a chart.

In the following example, a clinical alert is created for patients with active asthma, ADHD, and obesity problems to alert the clinician to review the patient's Care Plan and remember to generate a clinical summary for the patient at the end of the visit.

Click on the Tools menu and select Clinical Alerts Editor to open the editor:

When prompted with a list of existing clinical alerts, press "Add" to add a new alert.

Clinical Alerts Editor - Add Alert

Add Clinical Alert

Alert Name: Chronic Patients - Remind to review Care Plan and generate visit summary

Alert Message:
This patient has an active history of ADHD, Asthma, or Obesity.

Remember to review the Care Plan and generate a visit summary at the end of the visit.

What you want the clinical alert to say

▶ Source of the Clinical Alert

Present this Alert to:
Which EHR users or roles should see the alert?

◉ All users

○ Users with the role(s) of [▾]

Present this Alert when:

☒ The Chart is Opened
Do you want to see the alert when the chart is open, saved, or both?

☐ The Chart is Saved

Time Range for Criteria:

○ Today (only)
How far back do you want to look when looking at problem list criteria?

◉ From patient's birth through today

○ Within the past [5 ▲▼] [years ▾]

○ From [1 ▲▼] [years ▾] ago through [1 ▲▼] [years ▾] ago

When creating the alert, you need to specify the name and message for the alert, which users or role should see the alert, when you want the alert to appear, the criteria you want to restrict on, and the time range to use for the criteria. The screen shot above scrolls down to include the actual criteria restriction which, for our example, is restricting based on certain chronic conditions documented on the problem list:

Criteria:

Demographics: Select a criterion and then click Add.

[Add] | select a demographics criterion ▼

[Add] **Lab Test Results:** Click Add to select Lab Test Results Criteria

[Add] **Medications:** Click Add to select Medications Criteria

[Add] **Medication Allergies:** Click Add to select Medication Allergies Criteria

[Edit] **Problems/Diagnoses:**

> The patient was diagnosed with Asthma.
> OR   The patient was diagnosed with Attention deficit hyperactivity disorder.
> OR   The patient was diagnosed with Obesity.

Vitals: Select a criterion and then click Add.

[Add] | select a vitals criterion ▼

With this saved clinical alert, any patient with asthma, ADHD, or obesity marked as an active problem on their problem list will have the following alert appear when the chart is opened:

👤 Clinical Alert   [✕]

**ⓘ Clinical Alert: Chronic Patients –
Remind to review Care Plan and
generate visit summary**

> This patient has an active history of ADHD, Asthma, or
> Obesity.
>
> Remember to review the Care Plan and generate a visit
> summary at the end of the visit.

[Continue]