

Health Checks+

Document Version 1.2

Date: Feb 2016

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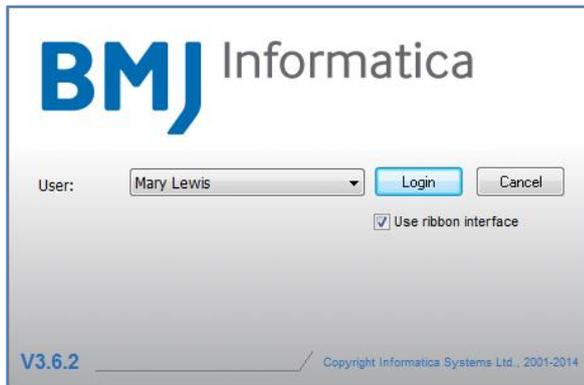
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Accessing the Health Checks Module



Accessing the Audit

Double click on the BMJ icon from your desktop



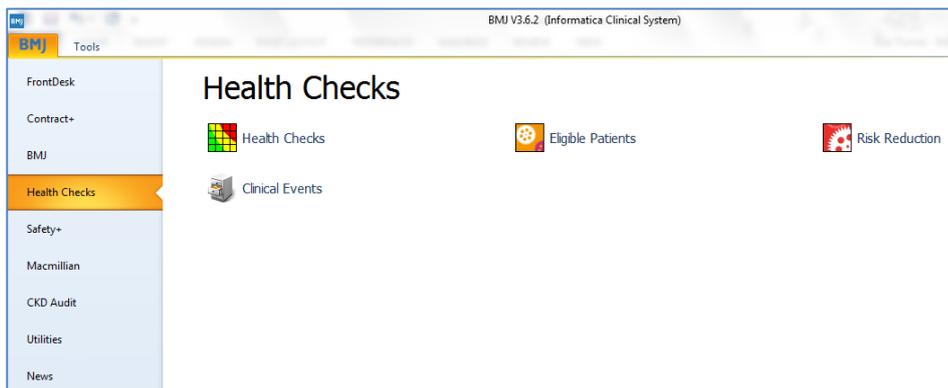
Accessing the Audit

Select your name from the list of Users and click **Login**

Note: a **Password** may be required

'Use ribbon interface' is selected by default

BMJ Health Checks

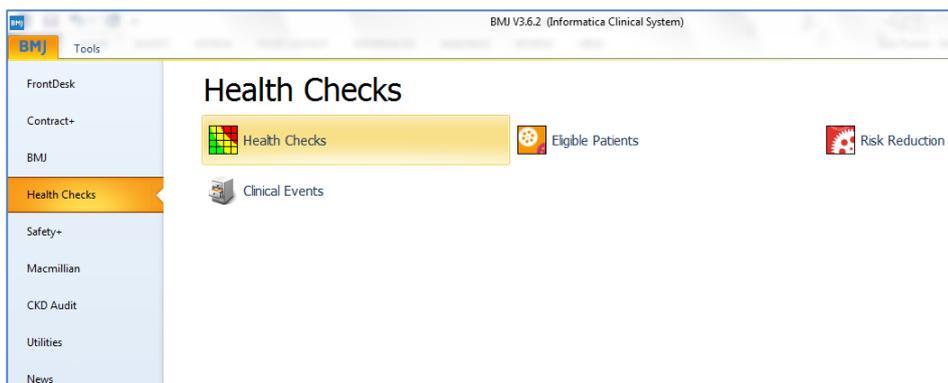


Accessing the Audit

From the BMJ menu select **Health Checks**

There are 4 options available within the Health checks menu.

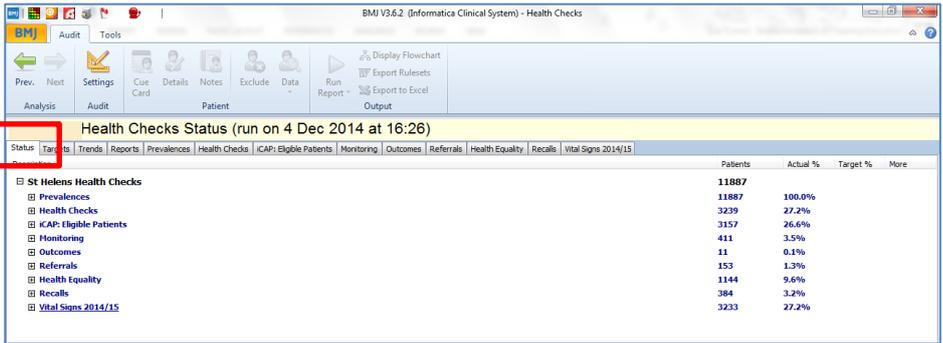
Health Checks



Health Checks

Select **Health Checks** from the menu.

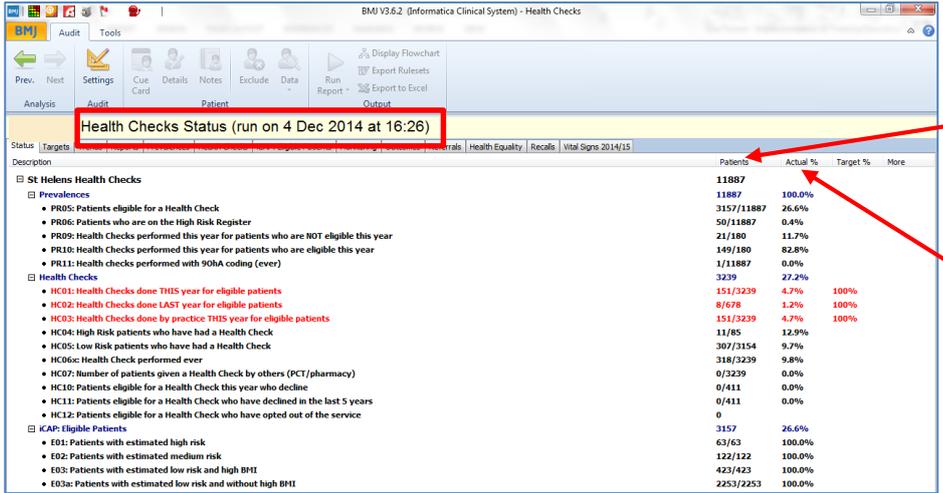
Health Checks – Status



Status Tab

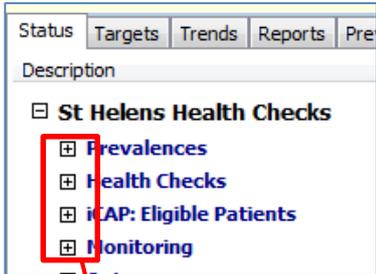
The Status screen shows the exact number of patients.

The banner along the top shows the audit name & the last date & time the data was analysed (a snapshot in time)



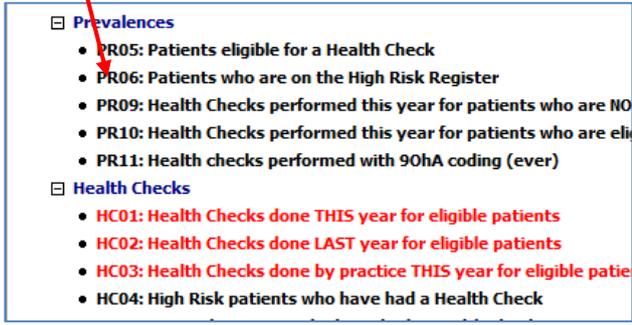
Patients' column – patient counts included in the sections & measures & meeting criteria

Actual % column – give patient information as a percentage



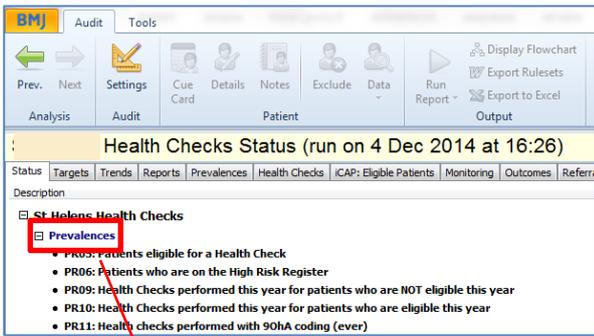
Status

Click on the + icons to expand the data



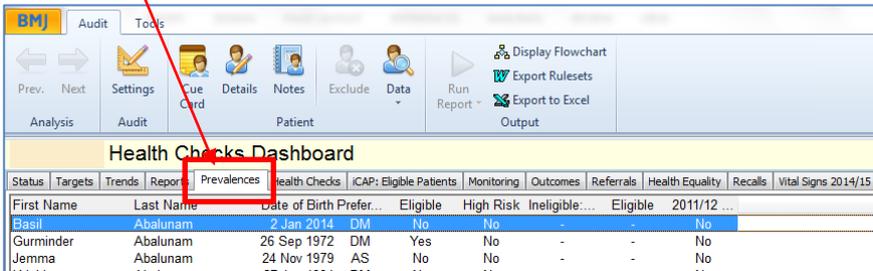
Prev. Next

The data is shown for the latest analysis date. You can look back through previous analysis dates by using the green arrows on the toolbar.

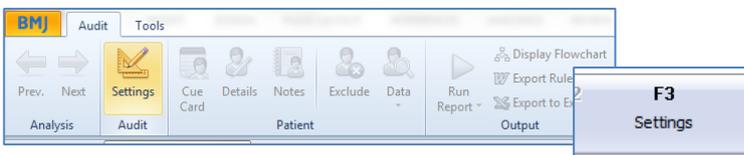


Section Headings

Click on a Section Heading to be taken automatically to the corresponding tab



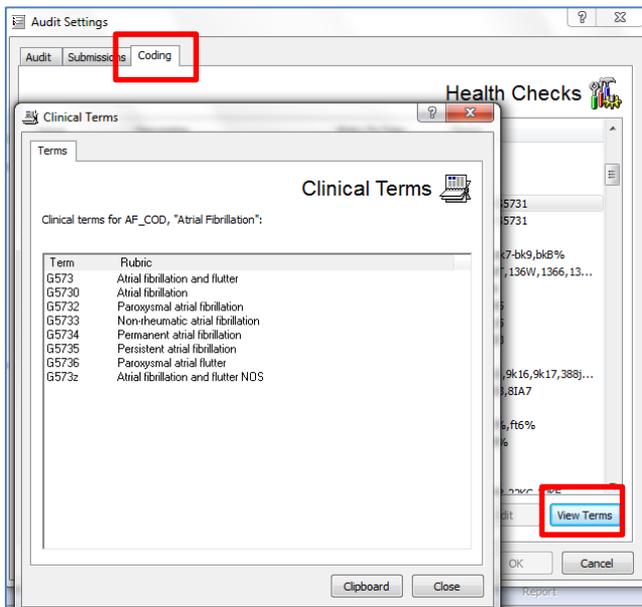
Health Checks Audit Settings & Coding



Settings

Click on the **Settings** icon or press F3

Health Checks Clinical Terms



Coding

To view the related clinical terms for the audit go to the **Coding** tab.

Clinical Terms

Within the Health Checks Coding window, click the **View Terms** button to display descriptions of the Clinical Terms

Health Checks Reports

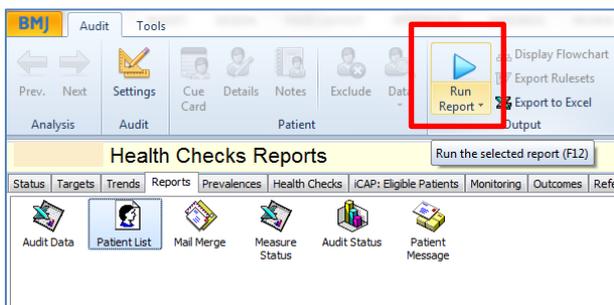


Reports

The reports tab is a standard feature of all BMJ audits. It has the functionality to run a wide selection of pre-defined reports.

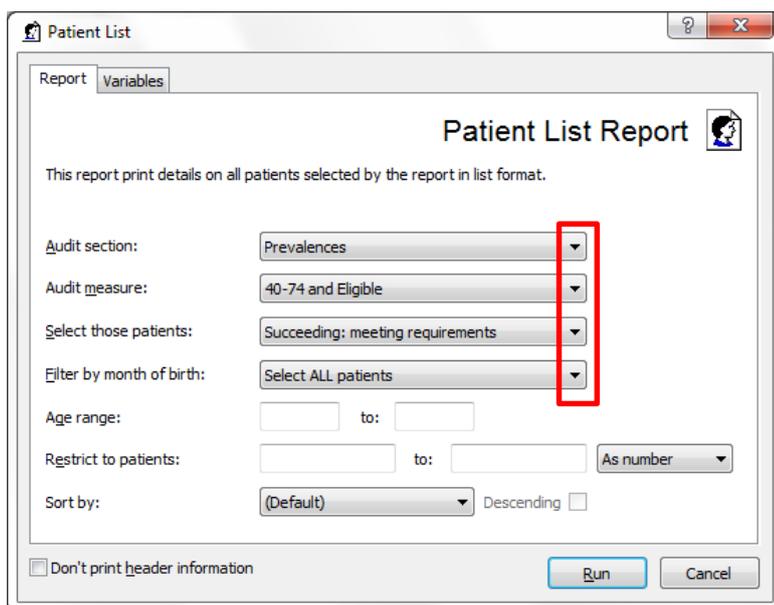
Audit Data Report: produces patient data by section in table format suitable for viewing in a spreadsheet. **Patient List:** produces a list of patients in table format defined by criteria within the report. This list can be exported to another application such as Microsoft Word or Excel. **Mail Merge:** produces a file suitable for use as a data source within another application, for example Microsoft Word. This can be used for patient recall. **Measure Status:** produces a report showing the current measure status of each section. **Audit Status:** produces a report of the status tab data with the option to breakdown into the attributes Age and Gender only if required. **Patient Messages:** enables the sending of SMS messages or emails to a user configurable groups of patients and produces a report listing the patients to whom a message has been sent.

Patient List



Patient List

Double click on the report or select **Run Report**



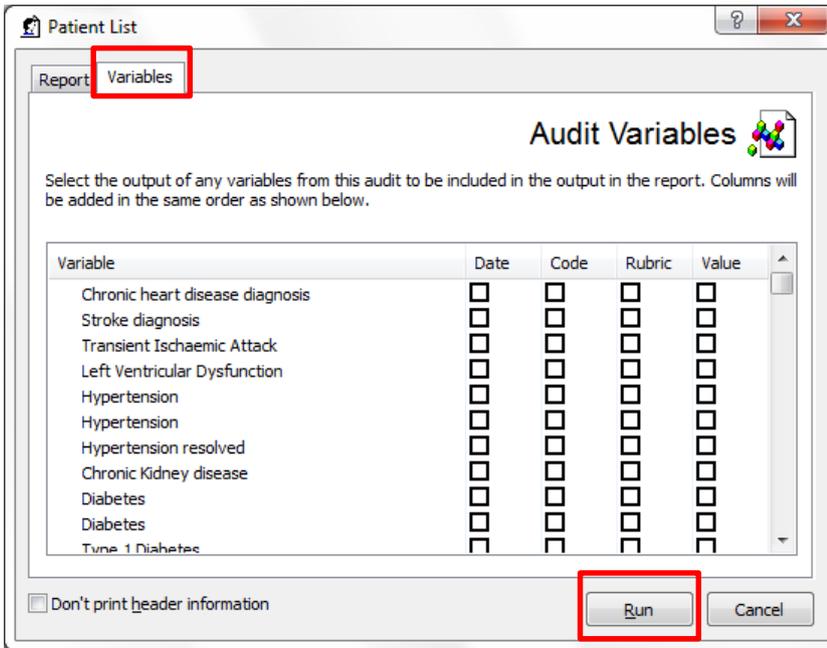
Patient List

Select your criteria from the drop down options:

Audit Section: Audit Measure:

Select those patients:

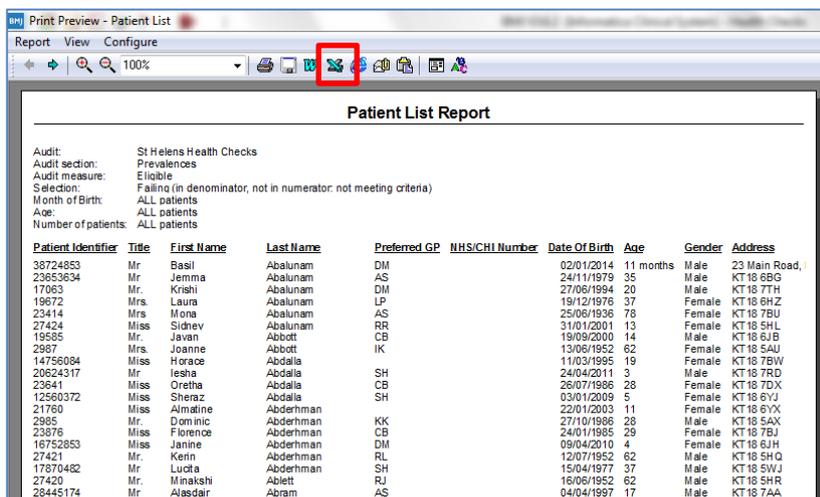
Filter by month of birth, Age range:



Patient List

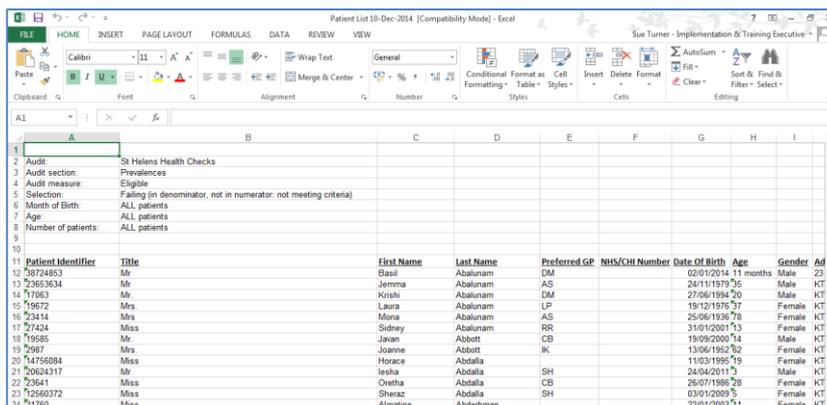
Use the **Variables** tab to add columns in the output of the report.

Click **Run**



Patient List Report

The Report is displayed. Click on the **Excel** icon to export to Excel.



Export to Excel

The Report is displayed.

Health Checks Tabs

Health Checks Status (run on 16 Dec 2014 at 09:48)

Status Targets Trends Reports Prevalences Invites Due **Health Checks** Monitoring Outcomes Additional Outcomes Advice Referrals following Health Checks Vital

Description

- St Helens Health Checks
 - Prevalences
 - Invites Due
 - Health Checks
 - Monitoring
 - Outcomes
 - Additional Outcomes
 - Advice
 - Referrals following Health Checks
 - Vital Signs 2014/15

Tabs

Each of the tabs display a different tranche of patients, e.g. Health Checks, Outcomes & Advice.

Click on the tabs to display the data.

Export to Excel

Health Checks Patients - Health Checks (3243 patients)

Status Targets Trends Reports Prevalences Health Checks iCAP: Eligible Patients Monitoring Outcomes Referrals Health Equ

First Name	Last Name	Date of Birth	High Risk	Low
Gurminder	Abalunam	26 Sep 1972	-	-
Raj	Abalunam	31 May 1953	-	-
Baboucar	Abbott	6 Jun 1966	Due	No
Junua	Abbott	6 Jun 1970	SH	Due

Export to Excel

Click on **Export to Excel** or F7 to export the current displayed screen to Excel.

Eligible Patients

Health Checks

Health Checks Eligible Patients

Export to Excel

The patients in this screen form part of the **Health Checks** initiative to be eligible for a Health Check.

Eligible Patients Tabs

Eligible Patients - High Risk 20%+ (270 patients)

High Risk 20%+ Medium Risk 10%-20% Low Risk 0-10% Declined Due This Year All Eligible

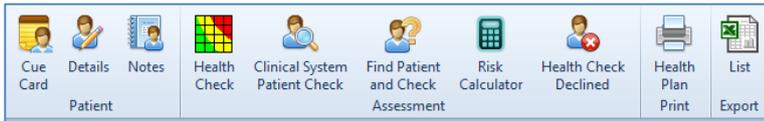
First Name	Last Name	Date of Birth	Age	GP	Est. Risk	BP	Total/HDL	Total Chol.	HDL Chol.
Lackvinder	Furness	26 Oct 1949	65	BD	100.0%	123/84	7.30		
Rhett-Vaughn	Squire	17 Oct 1964	50	DM	74.1%	89/64	14.60	0.50	
Aaron	Fielding	3 May 1942	73	BD	37.2%	142/80			
Jatinder	Bottomley	11 Jul 1944	71	BD	37.2%	175/90	5.60		
Precious	Challoner	8 Apr 1945	70	SH	36.8%	140/86	4.80	0.80	
Magdalen	Cox	12 Apr 1942	73	SH	36.2%	154/78			

Tabs

Each of the tabs display a different tranche of patients, e.g. High Risk, Medium Risk & Due this Year.

Click on the tabs to display the data.

Health Checks Toolbar and Function Keys



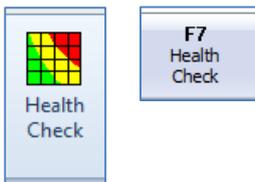
Toolbar and Function Keys

Options are available from either the Toolbar (top of screen) or the Function Keys (bottom of screen).

Performing a Health Check

The health screening and assessment tool for a particular patient can be brought up at any time by clicking on **Health Check** or via the patient **Cue Card** (Prompts). It comprises a simple form to collate data with helpful hints and integrated lifestyle questionnaires where appropriate.

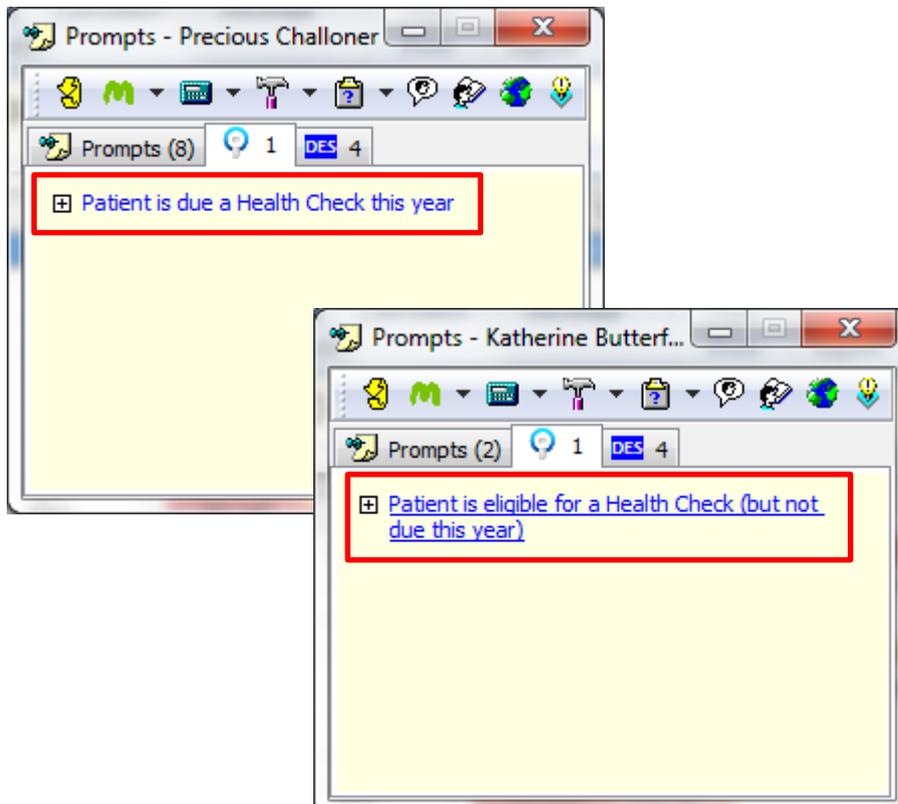
Health Checks are commissioned on a regional basis and therefore the audit and the questionnaire and workflow will vary from region to region, for this reason detailed assistance for the screening, assessment and workflow are not given in this user guide.



Performing a Health Check

Find or select a patient from within the Health Checks+ Audit, click on the Health Check icon or press F7

Cue Card



Performing a Health Check

The Health Check can be launched from the Cue Card directly from the patients' record via the Clinical System

Click on the prompt: **Patient is due a Health Check this year** or **Patient is eligible for a Health Check (but not due this year)**

Health Check – Screening Tab

Assessment

Patient Details
Male aged 70

Smoking
Ex-smoker

Family History of CVD (+60)
Enter a value

Ethnicity
British

Height
1.71 m

Weight
77.6 Kg

BMI
26.5 Kg/m²

Blood Pressure
155/79 mmHg

Lifestyle

HDL Cholesterol
1.4 mmol/L

Total Cholesterol
7.6 mmol/L

Cholesterol Ratio
5.4

Physical Activity
Enter a value

Family History of Diabetes
Enter a value

Manual Pulse Check
Enter a value

Alcohol Screening
Normal

Alcohol Units/Week

Workflow

References

Advice

- Blood pressure health impact & reduction advice required
- Asymptomatic patients with an ABI < 0.9 should be reviewed annually and excluded from further health checks
- Discuss dementia awareness with the patient, as they are aged over 65

Referrals

- Refer for familial hypercholesterolaemia assessment
- If abnormal pulse detected carry out or refer for ECG
- Record of erectile dysfunction found. QRISK2 score multiplied by 1.45. Manage in accordance with higher risk score (i.e.,

Estimated Risk

Latest Risk / Absolute Risk
38% / 43%

Health Check incomplete

Health Check – Screening Tab

Some of the data can be updated by clicking on drop down arrows e.g. Smoking

Health Check – Screening Tab

There are likely to be regional variations in the data that is required at each stage of the Health Check, this will be determined by your CCG.

Entries shown in **blue** are valid and need not be changed unless new information is available.

Entries shown in **red** are invalid (or out of date) and new information must be entered.

Changed information will be shown in **black**.

Smoking dropdown menu options:

- Ex-smoker
- Never smoked
- Ex-smoker
- Light (<10/day)
- Moderate (10-19/day)
- Heavy (20+/day)

BMI Calculator

Metric measurements

Height (cm): 171

Weight (Kg): 77

Imperial measurements

Height (ft): 5 + 7

Weight (st): 12 + 1

Body Mass Index: 26.330

Height: 1.70 m

Weight: 79.0 Kg

BMI: 27.3 Kg/m²

Health Check – Screening Tab

The icons across the top will assist when adding data e.g. BMI Calculator.

Updating or adding a Height and Weight will automatically calculate the Body Mass Index. Click OK.

All 3 fields will be updated in the Screening tab

Workflow

Health Check – Workflow

Check the **Workflow** section after each entry for further guidance on **Advice** or **Referrals**. This column will be automatically generated and will guide the clinician through the assessment process.

Workflow - References

The **References** section of the Workflow can be expanded to give further information on patient data such as the dates that previous data was recorded and whether or not it is out of date as well as some more general reference material and guidance to assist in the process.

Workflow - Advice

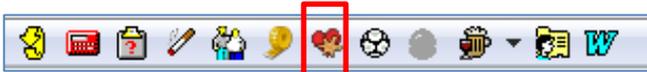
The **Advice** section in the Workflow may be expanded to give more details of advice required. When the appropriate advice has been given, click on the text and the **red** or **blue** exclamation mark will change to a **green** tick. This will indicate that the advice has been given and the code recorded.

Workflow – Referrals

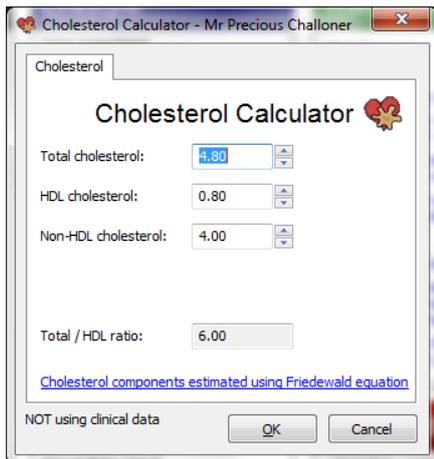
Check the **Referrals** section of the Workflow for additional patient care such as referrals to dietitians / stop smoking clinics / further appointments for monitoring or further tests that might be required.

When the referral has been made, click on the text and a green tick will be shown.

Check the end of the Workflow section for the yellow triangle symbol.



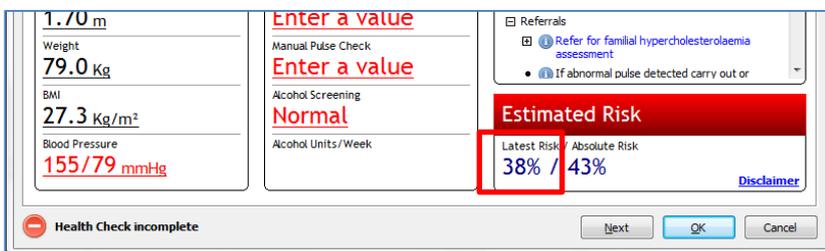
Health Check – Toolbar



The toolbar at the top of the Health Checks Screen gives quick and easy access to a number of questionnaires and calculators, some of which are additional to the ones used in the assessment:

CVD Risk Calculator, FINDRISC Calculator, Smoking Pack Years Calculator, Waist/Hip Ratio Calculator & Cholesterol Calculator

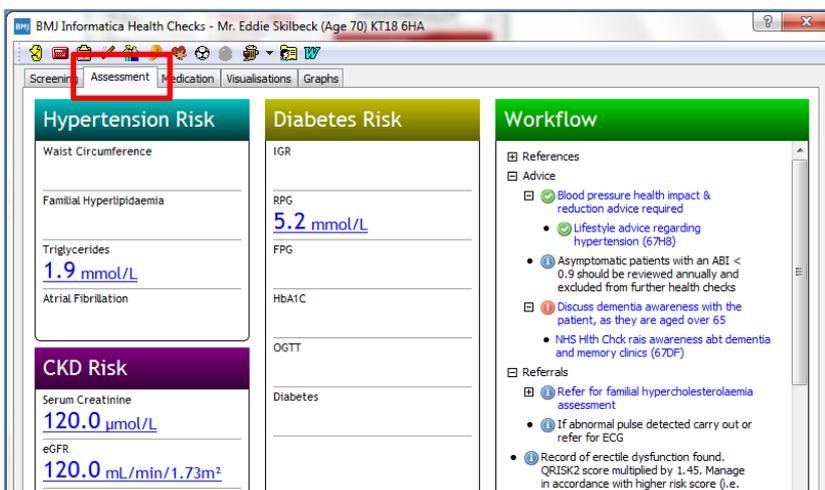
Estimated Risk



Health Check – Estimated Risk

The Estimated Risk section will update the latest risk as the clinician completes the screening.

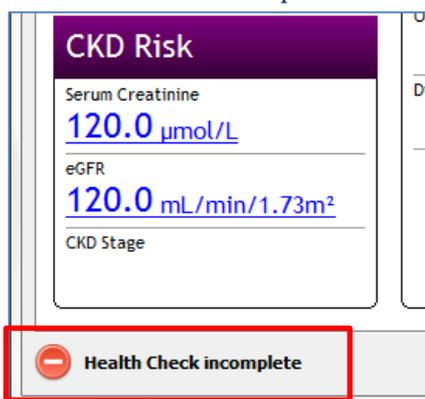
Health Check – Assessment Tab



Health Check – Assessment Tab

Complete the Assessment tab. If required.

Health Check Incomplete



Health Check Incomplete

The Health Check incomplete sign will be clearly visible in the bottom left-hand corner until the Health Check is complete.

You have not finished completing the screens until this disappears.

Health Check – Medication Tab



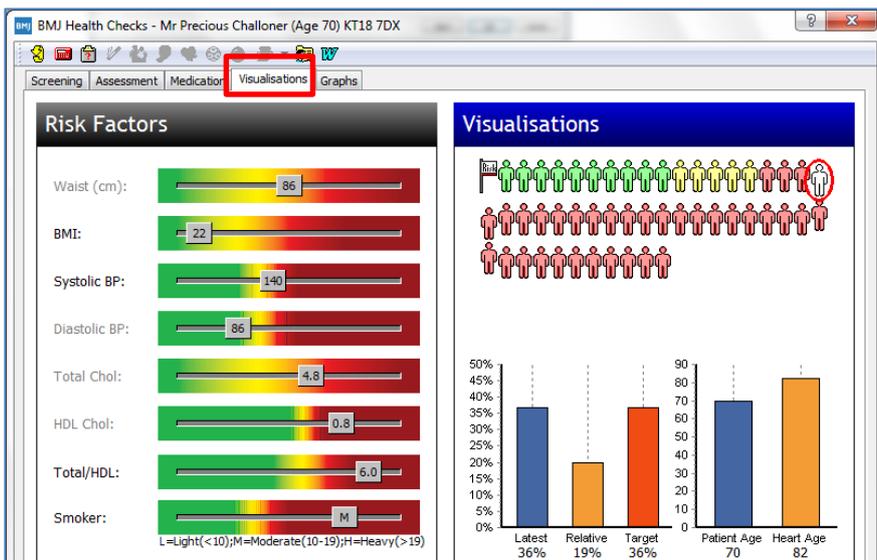
Medication Tab

Medication data is readily available for information.

This is a 'read only' screen for information.

Health Check – Visualisations Tab

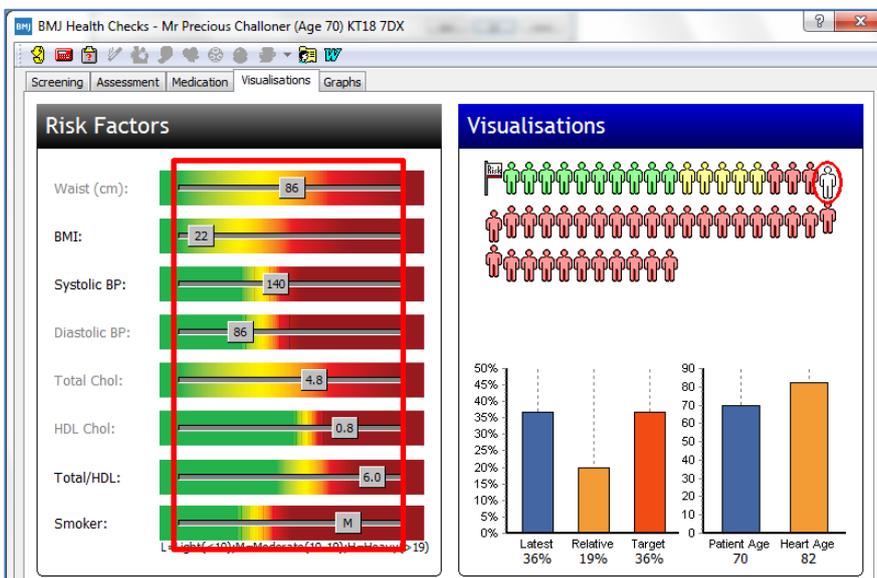
In addition to advice given by the clinician there are other tools available for patient education. The Visualisations Screen is an interactive screen which can demonstrate to the patient how factors such as smoking status and cholesterol can affect their target risk.



Visualisations Tab

Click on the Visualisations tab to open the interactive Visualisations screen. The screen is split into two parts; Risk factors and Visualisations.

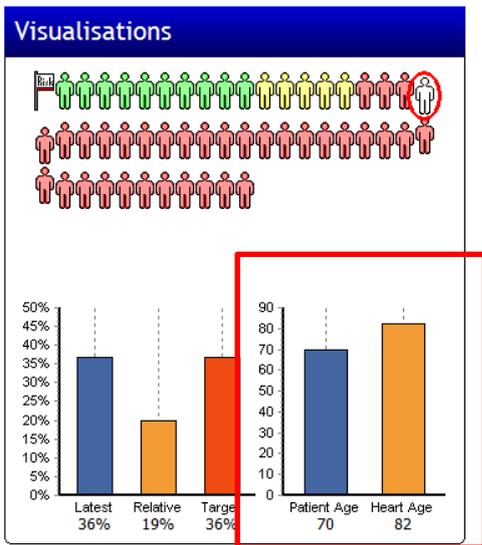
When the screen opens the patient's current risk, according to the health check data just entered, will be displayed.



Visualisations Tab

Move the sliding scales on the Risk Factors screen to indicate how changes in (for example) blood pressure / cholesterol and smoking status can affect the target risk.

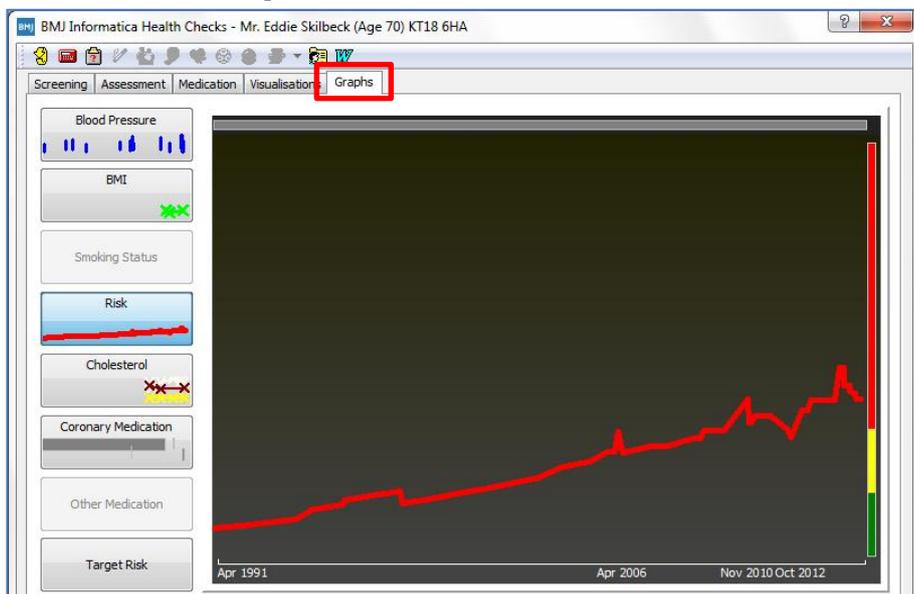
The factors that change the risk and the extent of that change will be dependent on the risk algorithm being used.



Patient Heart Age

This graph will display the **Patient Age** compared to the **Heart Age**. The age is displayed e.g. 70 & 82. As the sliding scales on the Risk Factors are changed the Heart Age is also adjusted.

Health Check – Graphs Tab



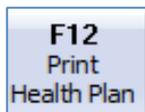
Graphs

This screen gives a visual representation of the different components that build up the picture of risk over a period of time, including: BP, BMI, Cholesterol etc..

Print or Open the Patient Plan



Print or Open Patient Plan



The results of the Health Check may be printed by clicking on the 'Print Patient Plan' icon on the toolbar, or by using **F12** from elsewhere in the application.



Open Patient Plan

View the Patient Plan prior to printing.

Personalised Health Plan for Mr. Eddie Skilbeck

Monday 15 Dec 2014

Readings

Height	1.70 m	Total Cholesterol	7.6 mmol/L
Weight	79.0 Kg	HDL Cholesterol	1.4 mmol/L
BMI	27.3 Kg/m ²	Cholesterol Ratio	5.4
Blood Pressure	155/80	Physical Activity	Moderately Inactive
Smoking status	Ex-smoker	CVD Risk	38%

Advice

Introduction

The results of your health check will give you and your GP a clearer picture of your health, and your risk of developing one of the vascular diseases (heart disease, stroke or kidney disease), and of type 2 diabetes (which can lead to vascular disease). Your risk of developing one of those diseases is never fixed. You can change it through your actions.

The health check cannot tell you with certainty that you will or will not develop one of these diseases in the future. No health test can do that. The check works out your risk as a percentage. This figure is used to assess your likelihood of developing one of the vascular diseases.

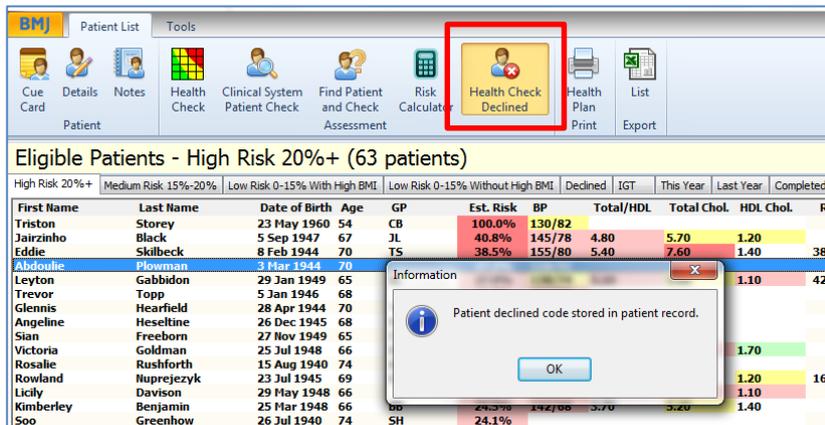
CVD Risk Score

Your results place you at a high vascular risk. You may be asked to book an appointment to see your GP.

Patient Plan

The Patient Plan will look similar to this example

Health Check Declined



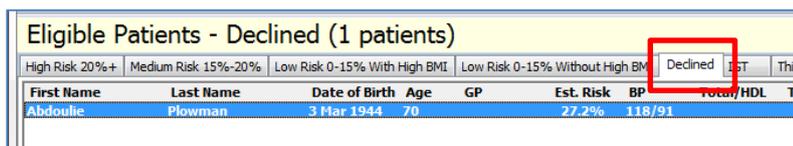
The screenshot shows a software interface for patient management. At the top, there are tabs for 'Patient List' and 'Tools'. Under 'Tools', a 'Health Check Declined' button is highlighted with a red box. Below the tools, a table titled 'Eligible Patients - High Risk 20%+ (63 patients)' is visible. An information dialog box is open over the table, displaying the message: 'Patient declined code stored in patient record.' with an 'OK' button.

High Risk 20%+	Medium Risk 15%-20%	Low Risk 0-15% With High BMI	Low Risk 0-15% Without High BMI	Declined	IGT	This Year	Last Year	Completed		
First Name	Last Name	Date of Birth	Age	GP	Est. Risk	BP	Total/HDL	Total Chol.	HDL Chol.	Ris
Triston	Storey	23 May 1960	54	CB	100.0%	130/82				
Jairzinho	Black	5 Sep 1947	67	JL	40.8%	145/78	4.80	5.70	1.20	
Eddie	Skilbeck	8 Feb 1944	70	TS	38.5%	155/80	5.40	7.60	1.40	38.0
Abdoulie	Plowman	3 Mar 1944	70							
Leyton	Gabbidon	29 Jan 1949	65						1.10	42.5
Trevor	Topp	5 Jan 1946	68							
Glennis	Hearfield	28 Apr 1944	70							
Angeline	Heseltine	26 Dec 1945	68							
Sian	Freeborn	27 Nov 1949	65						1.70	
Victoria	Goldman	25 Jul 1948	66							
Rosalie	Rushforth	15 Aug 1940	74						1.20	16.1
Rowland	Nuprezyk	23 Jul 1945	69						1.10	
Licly	Davison	29 May 1948	66						1.10	
Kimberley	Benjamin	25 Mar 1948	66						1.40	
Soo	Greenhow	26 Jul 1940	74	SH	24.1%					

Health Check Declined

Select the patient and click on Health Check Declined

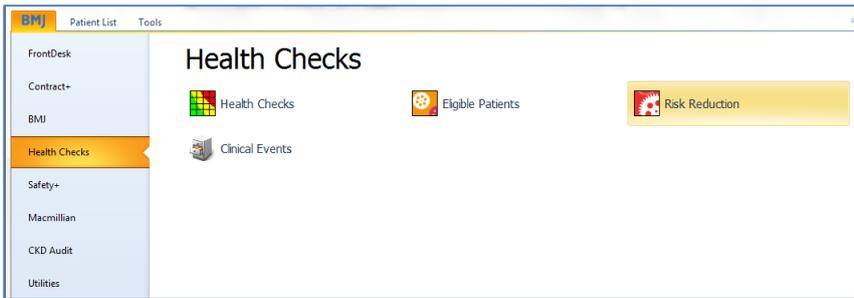
The Patient will appear in the Declined tab (following an Analysis)



The screenshot shows the 'Eligible Patients - Declined (1 patients)' tab. The 'Declined' tab is highlighted with a red box. Below the tab, a table lists the declined patient.

High Risk 20%+	Medium Risk 15%-20%	Low Risk 0-15% With High BMI	Low Risk 0-15% Without High BMI	Declined	IGT	This		
First Name	Last Name	Date of Birth	Age	GP	Est. Risk	BP	Total/HDL	To
Abdoulie	Plowman	3 Mar 1944	70		27.2%	118/91		

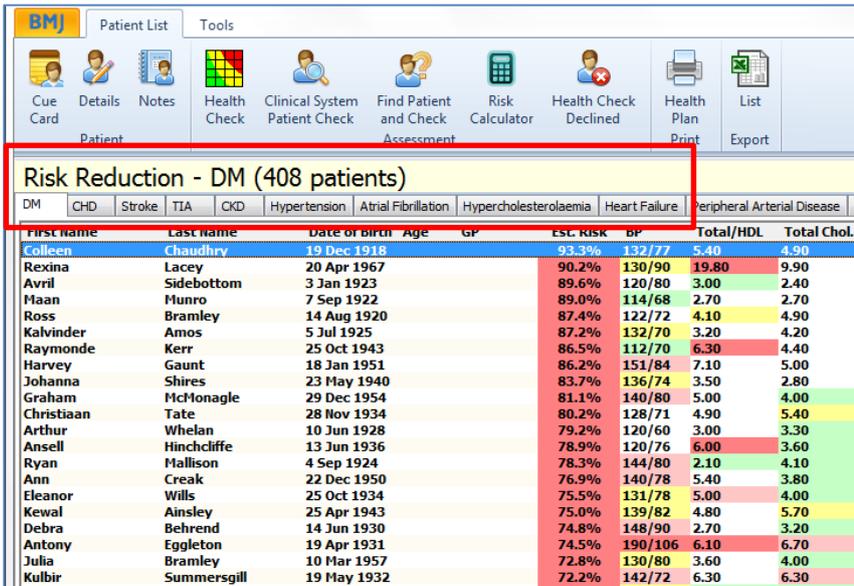
Risk Reduction



Risk Reduction

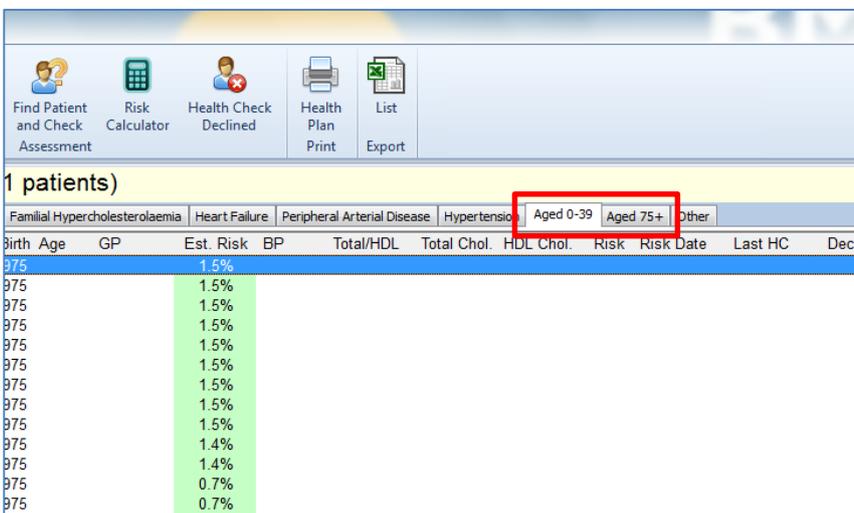
The patients in this screen do not form part of the **Health Checks** initiative as they all either have a current diagnosis for a vascular related disease, and are following a course of treatment to reduce their risk or are outside the age range to be eligible for a Health Check.

Risk Reduction Tabs



Patients who receive a diagnosis following on from their assessment will be moved into this screen from the **Eligible Patients** Screen.

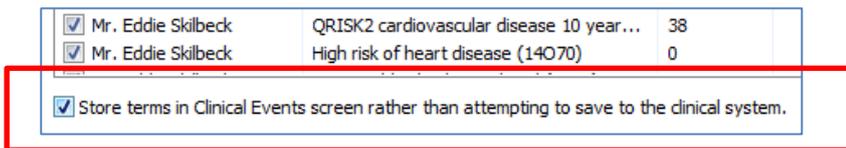
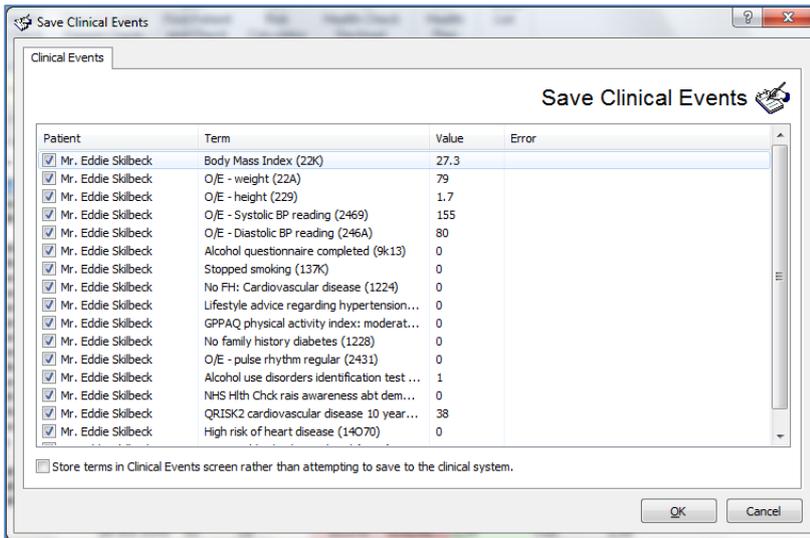
The display of patients in this screen is also subject to regional variation. The standard tabs that you are likely to see are **Diabetes, CHD, Stroke, TIA, CKD and Hypertension**. Patients may appear in more than one list.



This screen may include tabs for patients **0-39** and **75+**, these patients are outside the age range eligible for Health Check but their inclusion in this screen may help to monitor them and spot problems early.

It is possible to launch a **Health Check** from this screen should it be required for clinical purposes or for patient awareness.

Clinical Events



Save Clinical Events

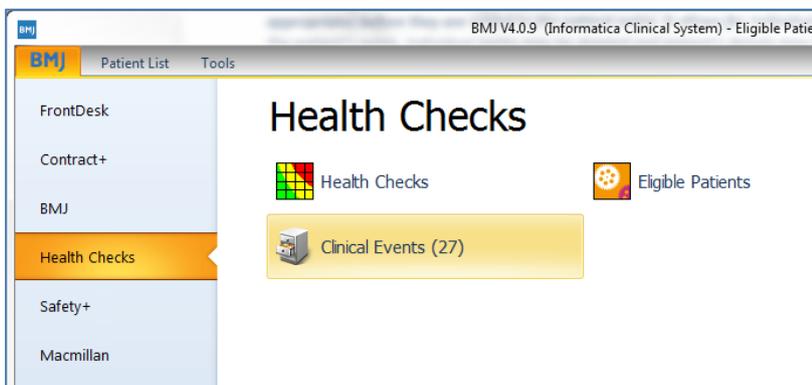
On completion of the Health Check the following screen will appear.

Click **OK** to attempt to save the list of Terms to the patients' clinical record.

OR

Tick the 'Store terms in Clinical Events screen rather than attempting to save to the clinical system' then click **OK**

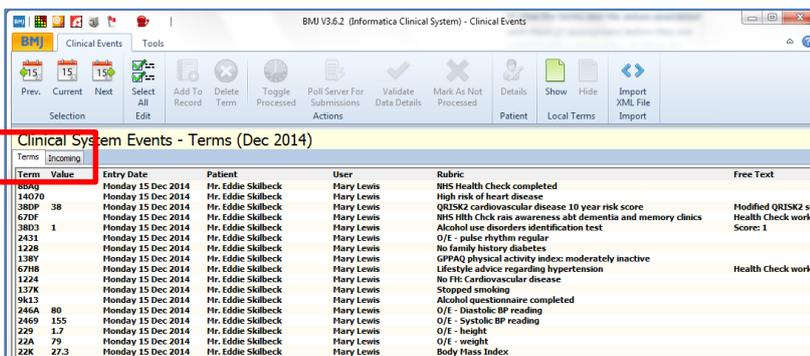
The Clinical Events module is a tool for managing Clinical System Events from within the system (Terms). This screen gives the user the opportunity to view the terms and the values associated with them (if appropriate) before they are added to the patient notes. It allows for individual or bulk additions of terms to the patient's notes. Individual terms may be deleted and patient's details may be viewed from the screen



Clinical Events

Select Clinical Events from the Health Checks menu.

Note: the number in the bracket (27) indicates how many Clinical Events are waiting to be added to the patients records.



The Terms tab lists all clinical system events that have been generated by the system.



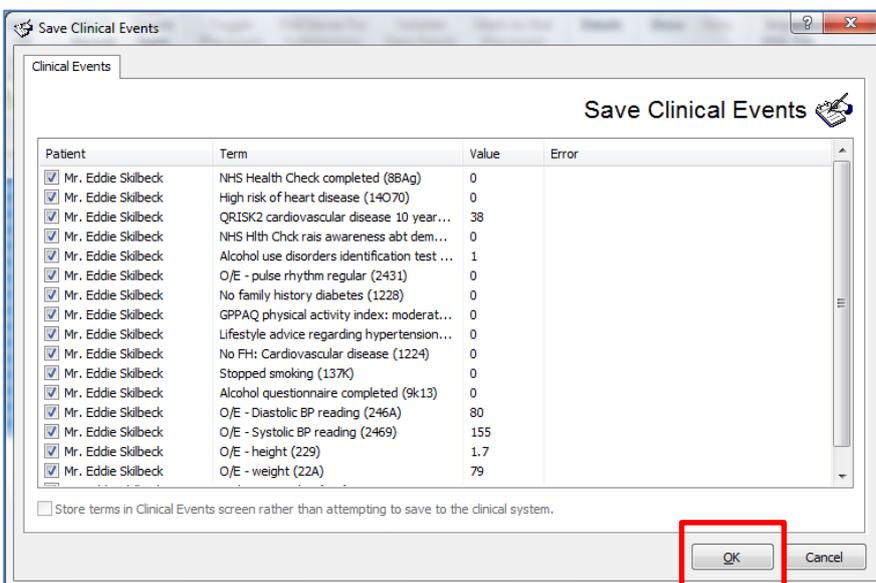
Save Clinical Events

To delete an individual term, select the term and use **F6**, or click **Delete Term** on the toolbar.

To add an individual term to the patient's record in the clinical system select the term and use **F9**, or click **Add to Record** on the toolbar.

To add multiple records to the clinical system use multi-select (shift+click) or click **Select All**. Use **F9**, or click **Add to Record** on the toolbar.

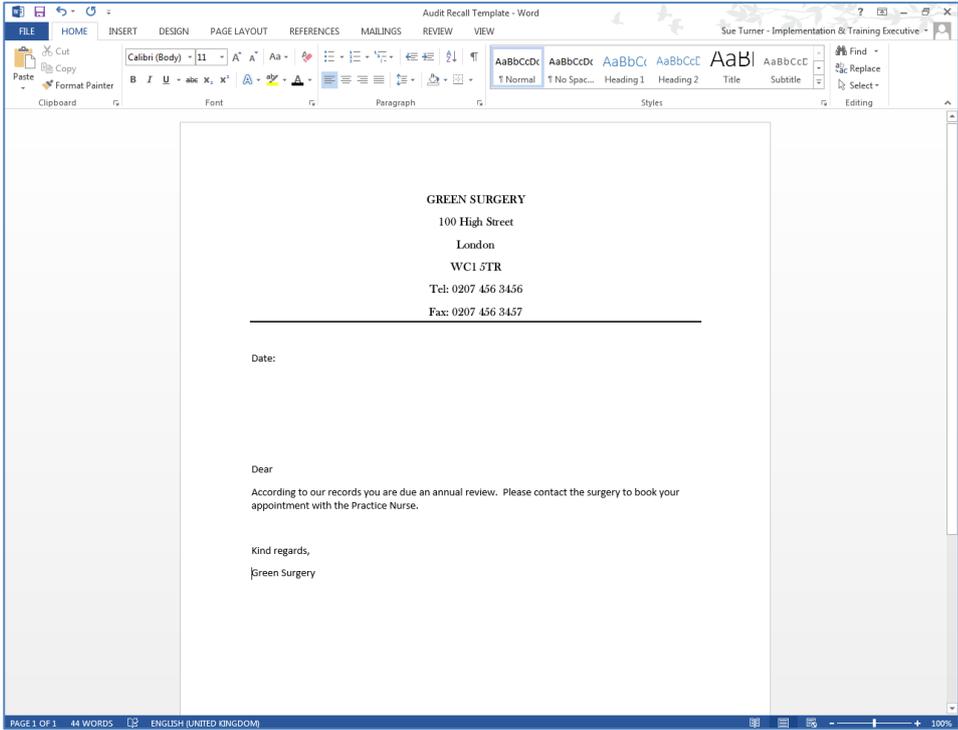
To view terms for earlier or later months use the green arrow/calendar icons on the toolbar.



Save Clinical Events

Click **OK** to save the list of Terms to the patients' clinical record.

Mail Merge



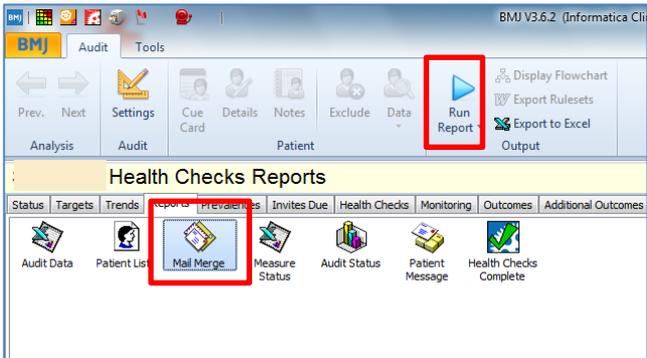
Create your letter/template prior to running the Mail Merge. Save the letter/template as a simple Word document so that it can be accessed later.

The letter/template should only contain the main body of text. Leave the Merge Fields blank e.g. Name and Address for the patient, these will be added later.

Note: These instructions are based on Word 2013

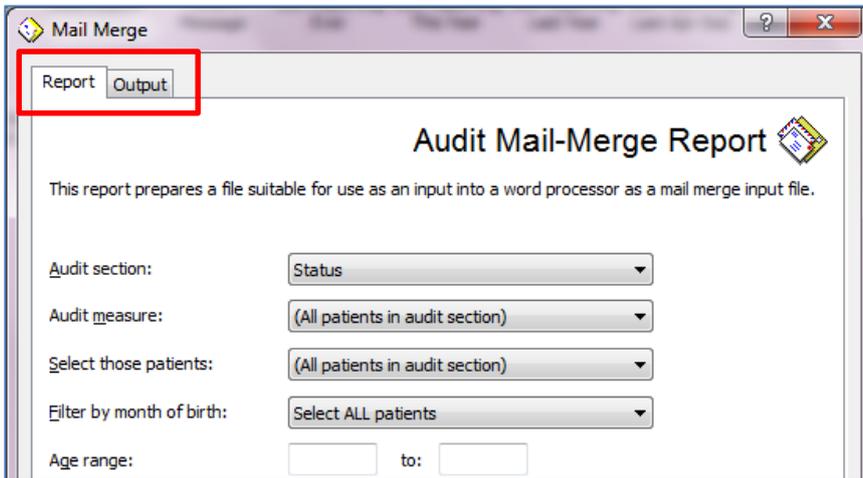


From within Health Checks select the Reports tab.



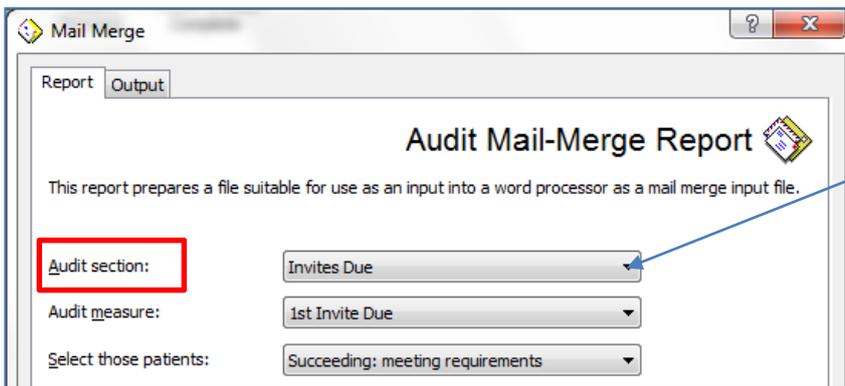
Accessing Mail Merge

Double click the Mail Merge icon or highlight the icon and click Run Report



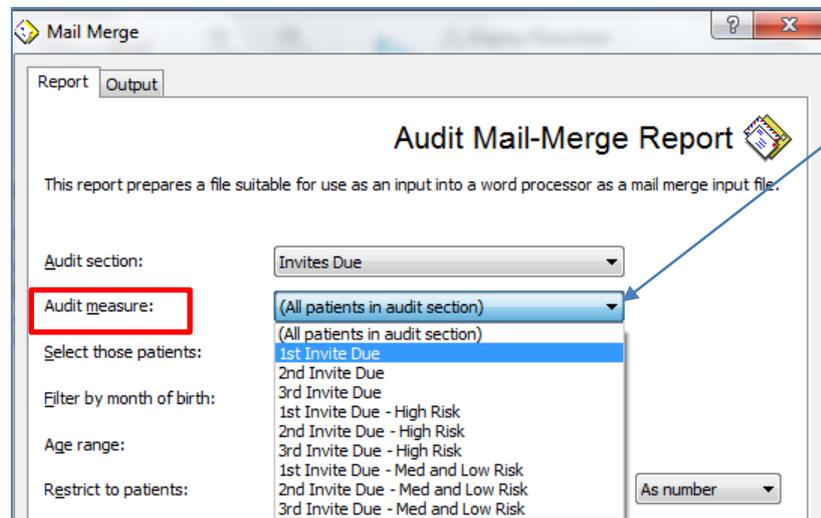
The Audit Mail-Merge Report is made up of 2 tabs:

Report & Output



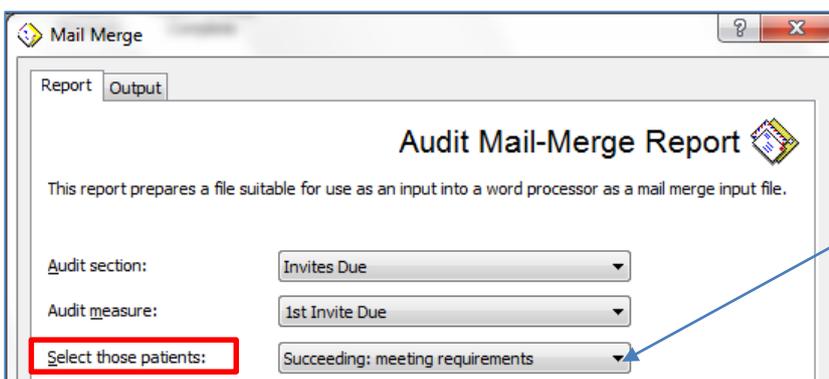
Report tab – ‘Audit Section’

Click on the drop down arrow to select the ‘Audit section’ required



Report tab – ‘Audit measure’

Click on the drop down arrow to select the ‘Audit measure’ required



Report tab – ‘Select those patients’

Click on the drop down arrow to ‘Select those patients’ required according to whether they are in Denominator AND/OR in Numerator

Mail Merge

Report Output

Audit Mail-Merge Report

This report prepares a file suitable for use as an input into a word processor as a mail merge input file.

Audit section: Invites Due

Audit measure: 1st Invite Due

Select those patients: Succeeding: meeting requirements

Filter by month of birth: August

Age range: 50 to: 60

Report tab – ‘Filter by month of birth’

Click on the drop down arrow to select a month of birth if required. This can be used to spread the workload.

Mail Merge

Report Output

Audit Mail-Merge Report

This report prepares a file suitable for use as an input into a word processor as a mail merge input file.

Audit section: Invites Due

Audit measure: 1st Invite Due

Select those patients: Succeeding: meeting requirements

Filter by month of birth: August

Age range: 50 to: 60

Restrict to patients: 1 to: 20 As number

Report tab – ‘Age range’

Click in the boxes to filter by ‘Age range’ if required.

Mail Merge

Report Output

Audit Mail-Merge Report

This report prepares a file suitable for use as an input into a word processor as a mail merge input file.

Audit section: Invites Due

Audit measure: 1st Invite Due

Select those patients: Succeeding: meeting requirements

Filter by month of birth: August

Age range: 50 to: 60

Restrict to patients: 1 to: 20 As number

Sort by: Surname Descending

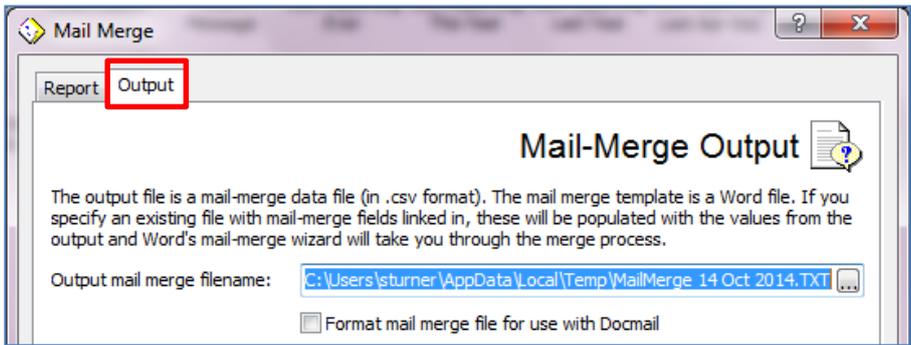
Report tab – ‘Restrict to patients’

Click in the boxes to add a filter to Restrict to patients, as a number or percent. This allows the numbers of patients to be restricted.

Report tab – ‘Sort by’

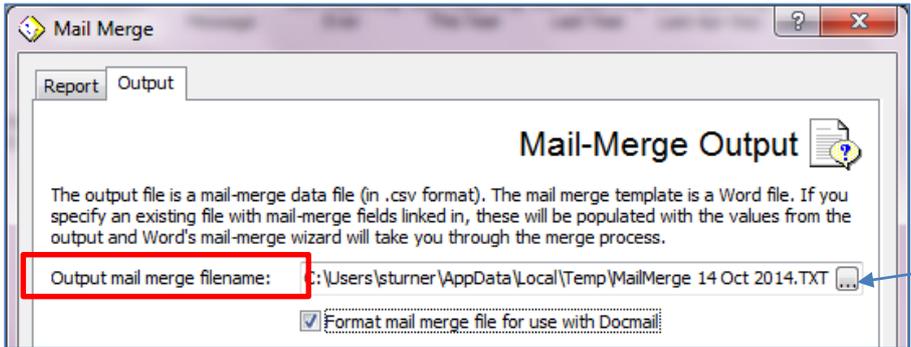
Click on the drop down arrow to select the ‘Sort by’ if required.

You can also change the order to **Descending**



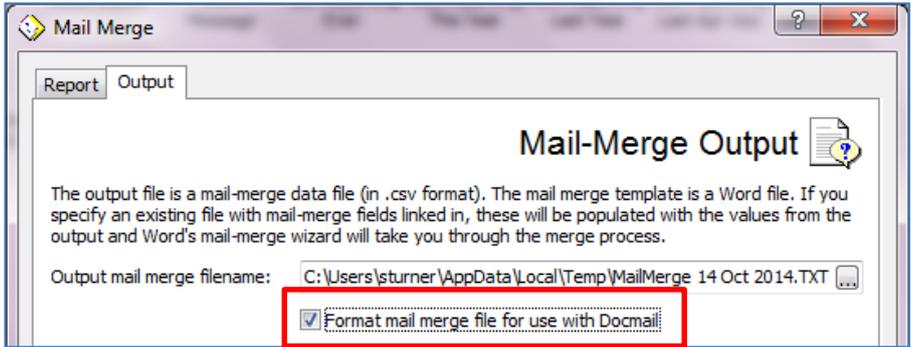
Output tab – Mail-Merge Output

Click on the Output tab to complete the process



Output mail-merge filename:

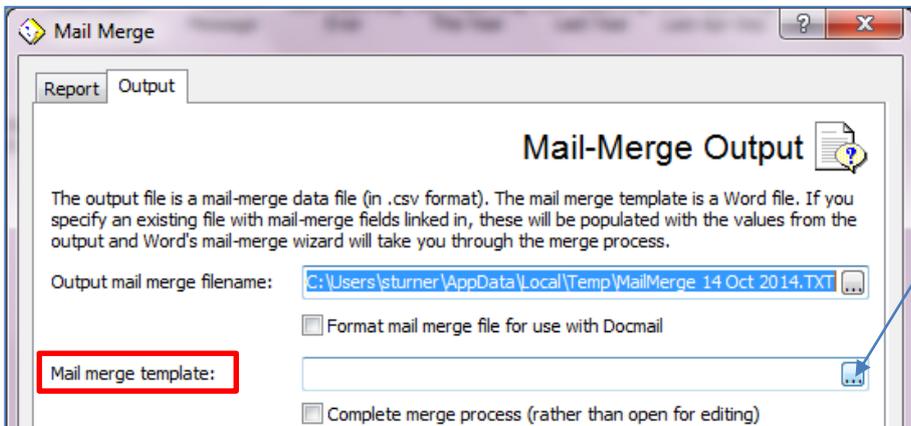
The Output mail merge filename: will be populated automatically or you can change the location and navigate to the desired file save location.



Output mail-merge filename:

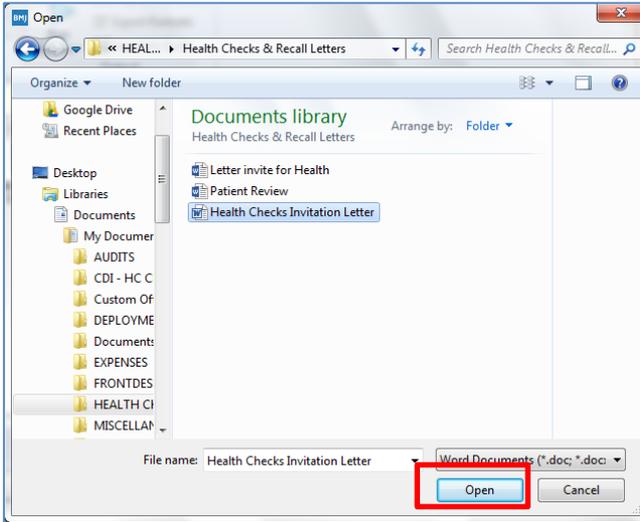
A file is created which can be forwarded to Docmail. The file is found in the Output mail merge filename: (above)

Note: Docmail are a company offering a printing and posting service.



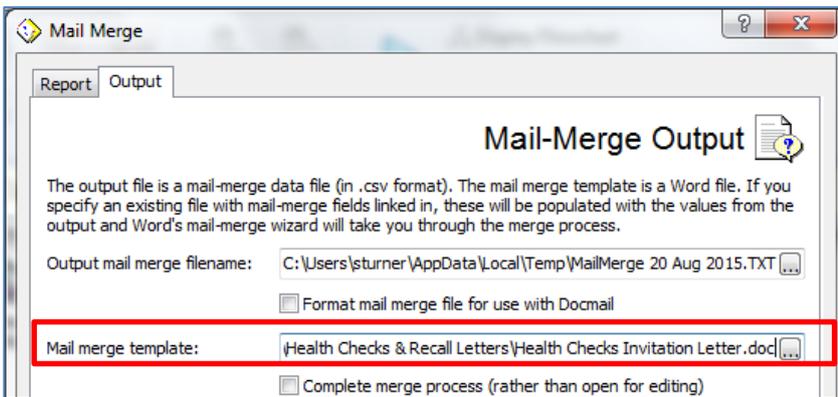
Mail merge Template:

Click on the browse button and navigate to the desired file and select your mail merge letter/template created and saved previously.



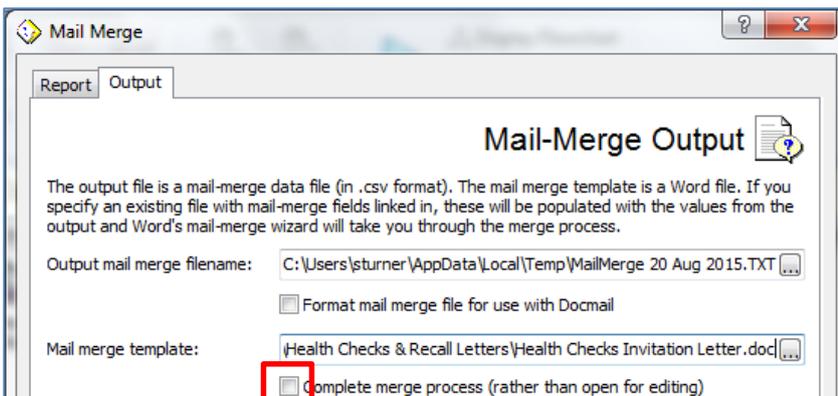
Mail merge Template:

Select your mail merge letter/template and click Open.



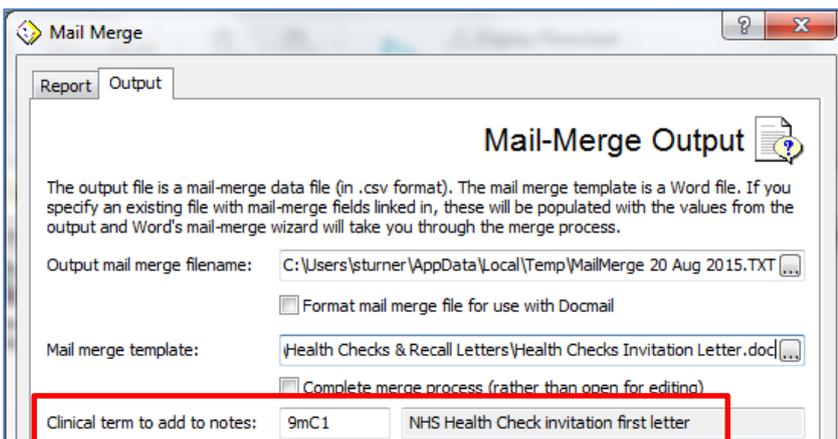
Mail merge Template:

The path for the mail merge letter/template is now populated.



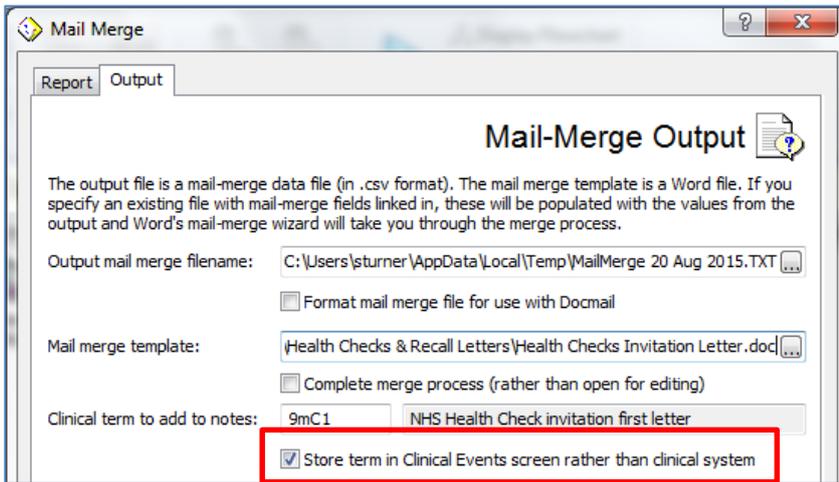
Complete merge process:

Only tick this if your letter/template already contains merge fields.



Clinical term to add to notes:

If you wish to add a Clinical Term to the patients notes (Read code), the relevant code should be displayed automatically.



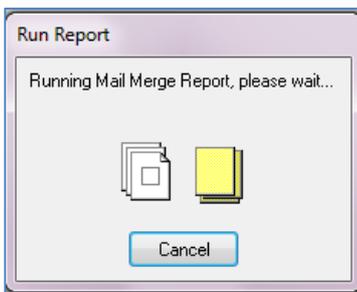
Store term in Clinical Events...:

See Clinical Events module (page 28) for more information.



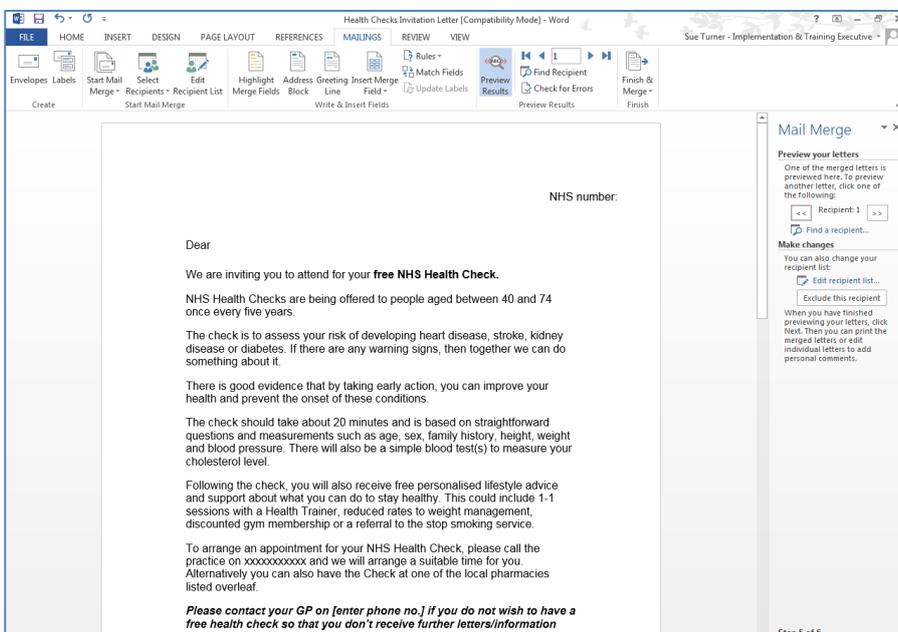
Run

*Click **Run** to complete the process.*



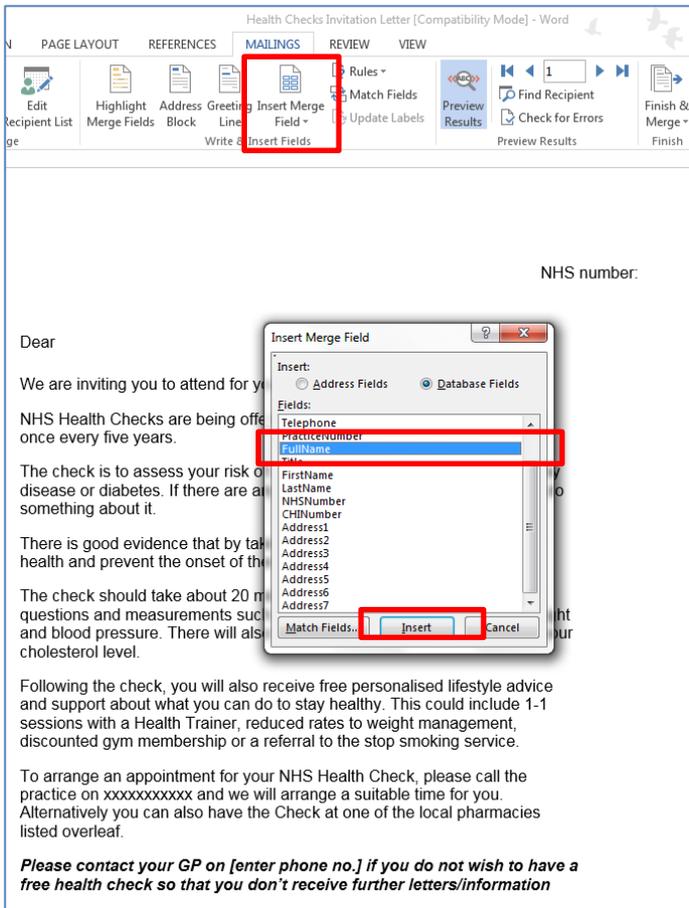
Run Report

This window will appear as the Report is running.



Word Letter/Template

Word will open and your letter/template will appear.



Insert Merge Field

Position your mouse where you would like to insert your first merge field and click once so that the cursor is displayed.

Click the Insert Merge Field icon on the toolbar to display a list of available merge fields.

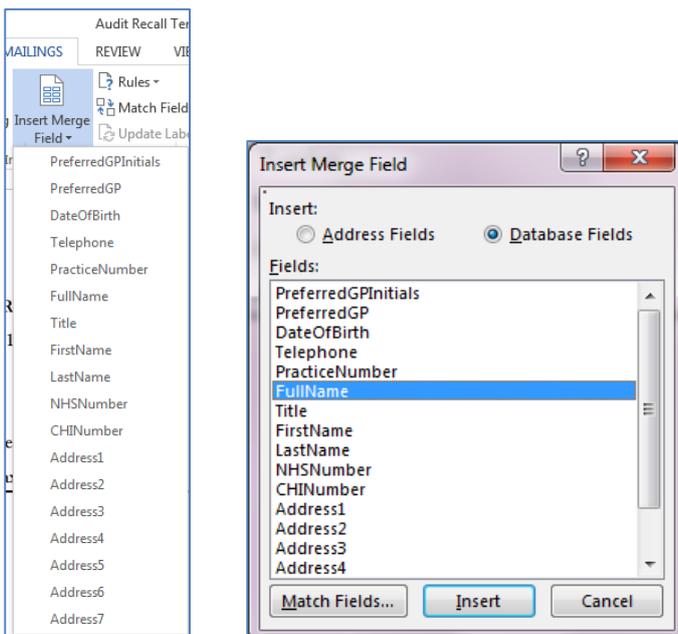
Click on the first merge field to insert it into the letter. Remember to put a space in-between merge fields on the same line.

Continue to add additional merge fields in the same way.



Insert Merge Fields

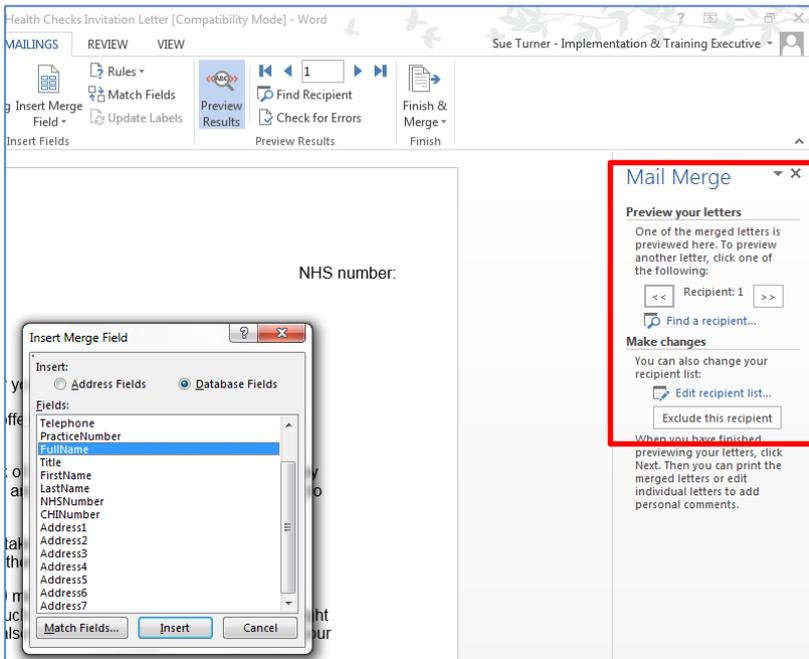
Note: In earlier versions of Word this is the icon for Insert Merge Fields



Insert Merge Field

These are the headings in the data source, for example, Title, FirstName, LastName etc.

When a mail merge is run, data held within these headings will be added to the letter where the corresponding merge field is displayed. Merge fields need to be added manually to your letter.



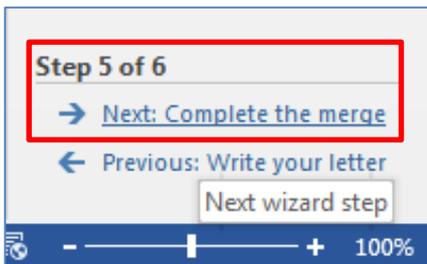
Mail Merge – Preview your letters

You can preview your letters by clicking on the arrow buttons (Recipient 2 etc..)

You also have the option to Exclude this recipient.

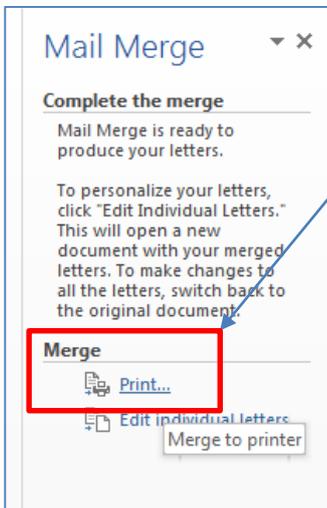
Action Required

Any notices that need to be actioned will show in the **Action Required** window on login. Click on the text in this window, **“Nominated Users must be assigned....”**. This will take the user to the **Authorised User Selection** screen. Note: If the User closes this window without completing the next stage, it will continue to appear until the notice has been actioned.



Mail Merge – Complete the Merge

Click on Complete the Merge



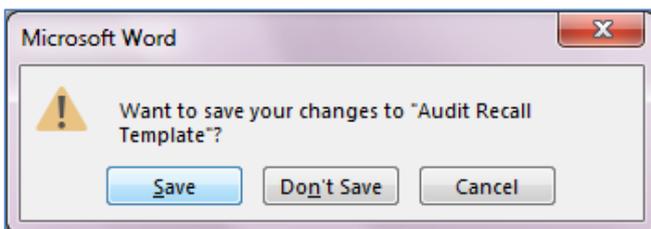
Mail Merge – Print

Click on Print

Save your changes

The following window will appear, click **Save**

This will save the inserted merge fields for use with future recalls



Report complete

Click OK



Useful Contact Details

If you require any assistance, please contact Support:

	support@ishealth.co.uk	Please provide a contact name and number, practice NHS National code *and* a 'Reply to' email address
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