

# Best Practices for Using "Insights" in PointClickCare\*: Tip Sheet for Users

**\*For more information about PointClickCare network in Oregon, please [click here](#)**

"Insights" appear in the PointClickCare network (fka EDIE, Collective Platform, or PreManage). The "Insights" section is found on the Patient Overview page.

Entering Insights is helpful for coordinating care for your patients.

Insights includes six sections:

- Usual State of Health
- Medical/Surgical History
- Mental Health
- Substance Abuse
- Social Determinants of Health
- Homelessness and Housing Insecurity.

You may enter information in any of these sections as they apply to the patient. **Insights should be concise, actionable, and relevant to the care of the patient.** This will ensure care providers can quickly ingest and act on the suggestions you contribute.

In the following pages, you will find a description of the six different sections found within Insights and a set of examples to help guide you as you begin creating insights for your patients.

# 1. USUAL STATE OF HEALTH

Description: These insights provide other providers information regarding how the patient functions at baseline. Usual state of health may include how the patient typically presents under certain conditions and any recommendations on interventions. These insights may also include any resources that the patient typically needs to manage their healthcare needs.

## Usual State of Health

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Patient suffered from a CVA in 2020 that left him with residual left sided weakness. Patient is typically alert and oriented x 3. Patient typically presents with altered mental status in the setting of an acute UTI. Patient performs straight catheterization at home three times a day.

## Usual State of Health

B I U H<sub>1</sub> H<sub>2</sub> x<sub>2</sub> x<sup>2</sup> Normal Normal Sans Serif

Patient has a history of ESRD. Patient is scheduled for hemodialysis on MWF, but frequently misses appointments. Pt is a dialysis patient at US Renal Care - Downtown location. Dialysis SW is Dow Jones and can be reached at 123-456-7890

## 2. MEDICAL/SURGICAL HISTORY

Description: These insights are meant to provide a history of previous medical/surgical history. These may include prior diagnoses and procedures that may help a provider narrow down their differentials, avoid duplication of procedures, and prevent adverse events.

### Medical/Surgical History

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Patient has a history of atrial fibrillation and is taking warfarin 3 mg daily (last updated 1/10/2022). If patient suffers a fall with suspected head injury, please call 911 or take patient to the emergency department.

### Medical/Surgical History

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Patient experiences prolonged QT intervals when administered Haloperidol. Please avoid if patient experiences acute delirium.

# 3. MENTAL HEALTH

Description: These insights are meant to provide the care team with information regarding the patient’s mental and behavioral health. This may include baseline clinical presentation that the patient typically presents with and any recommended interventions. These insights may also include any resources that the patient typically needs to manage their mental and behavioral health.

## Mental Health

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Patient has a dx of schizophrenia. Patient’s baseline includes low to moderate levels of auditory hallucinations, some difficulties with memory and some irritability. Pt is on anti-psychotics which are managed by his psychiatrist at Valley Mental Health – for medication questions Dr. Jones can be reach 8-5pm at xxx-xxx-xxxx. Pt is very sensitive to changes to his medications, with significant decompensation in sx at even the mildest changes; if pt is admitted to the hospital please coordinate medication regimen with outpatient psychiatrist Dr. Jones.]

## Mental Health

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Pt has multiple prior self-harm acts with no known history of suicide attempt or S[

## Mental Health

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Pt is very ill when he decompensates psychiatrically, requiring admission; patient has a history of requiring an involuntary hold during each of these prior admissions.



## 5. SOCIAL DETERMINANTS OF HEALTH

Description: These insights are meant to provide other providers with information regarding the patient's social determinants of health including transportation, social support, employment, and access resources. These may include any social programs or benefits that the patient has been enrolled to.

### Social Determinants of Health

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Patient does not have a mode of transportation but is enrolled with a discharge van services through the Medicaid program. Please call 123-456-7890 for transportation needs.

# 6. HOMELESSNESS AND HOUSING INSECURITY

Description: These insights give care providers information regarding the patient’s housing status including shelter use, encampments, employment, and access to resources. These may include any social programs or benefits that the patient has been enrolled to.

## Homelessness & Housing Insecurity

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Pt is homeless with very few social / familial supports; please do not call pt's daughter (Jane Smith), as she neglects patient and steals her meds; patient has a safe and reliable friend named Dow Jones at 123-456-7890 who has previously housed pt temporarily post hospital.

## Homelessness & Housing Insecurity

**B I U** **H1 H2** Normal Normal Sans Serif

Has been referred to section 8 housing and is on a wait list. When pt presents to the ED, please call ICM community tx team 555-123-4567; this team can come to the ED to help facilitate a discharge plan and help coordinate care.

# FREQUENTLY ASKED QUESTIONS



## 1. WHAT ARE INSIGHTS?

Important clinical and care coordination information that is shared across the network by members of the patient's care team. Insights can range from purely medical information to issues pertaining to behavioral health to issues related to social determinants of health with the overarching aim of providing a holistic picture of the patient as an individual person with a specific history, specific preferences, and specific health related goals.

## 2. WHO CAN CREATE/AUTHOR/UPDATE INSIGHTS?

Any user with 'patient access' can create/author/update an Insight. End user access is governed by Account Managers at the facility level itself. An organization may choose to have few or many Account Managers depending on the size of the organization. It is always recommended to have at least two Account Managers due to staff turnover, staff out sick, etc. A facility's Account Manager adds and removes end users at one's facility. End user access can be limited by the Account Manager to a 'read-only' status if the facility would like certain end users to not have edit privileges. Conversely if an organization would like to ensure certain end users are able to author and contribute content then access entitled 'patient access' can be enabled allowing these end users to write Insights, Safety and Security Events, etc.

## 3. WILL I BE ABLE TO EDIT AN INSIGHT THAT SOMEONE ELSE WROTE?

Yes - you will be able to add additional information in an Insight that has been authored by someone else. You can also delete outdated information. This will ensure up-to-date & relevant information is available to end users. Active users are encouraged to provide their contact information in the Insights or Care Team section on the Patient Overview page.



# FREQUENTLY ASKED QUESTIONS



## **4. WHAT IF THE ATTACHMENT TYPE(S) IN AN INSIGHT DOESN'T EXACTLY MATCH THE DOCUMENT I WANT TO UPLOAD?**

Attachments in the Insights can still be used. It is likely we will add document types and other enhancements in future updates to this feature.

## **5. WILL INSIGHTS “TRIGGER” NOTIFICATIONS IN THE ED?**

Yes, active Insights trigger notifications to the ED for 18 months since creation or last update.

## **6. CAN I GET INSIGHTS IN SCHEDULED REPORTS?**

Scheduled Reports can include a field for whether or not an Insight exists for a patient (Y/N reporting), but not full Insights text. However, currently the Homelessness & Housing Insecurity Insight is available through Scheduled Reports. Additional topics will be added to this feature in the future.

## **7. CAN I GET REPORTING ON WHO AUTHORED & WHO EDITED INSIGHTS FOR INCENTIVE TRACKING?**

The author contribution history is visible on the entry. However, author contributions are not available in reporting at this time.

## **8. CAN USERS DELETE INSIGHTS?**

Yes, end users with 'patient access' privileges can edit and delete content within an Insight.

# FREQUENTLY ASKED QUESTIONS

## 9. HOW WERE THE INSIGHTS TOPICS DETERMINED?

The PointClickCare Product team worked with our Clinical leadership and partners on the development of these specific topics.

## 10. WHO WILL BE ABLE TO SEE THE INSIGHTS CONTENT?

Visibility follows the same rules as Care Histories & Care Guidelines. Once a topic is turned on, roles with the permissions to view/create/delete/modify today will have the same level of access.

## 11. WILL WE BE ABLE TO INTEGRATE INSIGHTS WITH FHIR?

We're currently looking at where Insights fits on the FHIR roadmap, but do expect that Insights will eventually populate for facilities with SMART on FHIR integration (currently only offered for EDs with an EMR of Epic or Cerner).



## 12. IS THERE A WAY TO INCLUDE CONTACT INFORMATION FOR THE AUTHOR SO OTHER USERS CAN CONTACT THEM FOR MORE INFORMATION?

This is not something currently in scope as a structured field. If the author is part of the Care Team, their contact information can be found there. Or if the author wants to be contacted, they can leave their contact information in the content of the Insight.

# FREQUENTLY ASKED QUESTIONS

## 13. CAN SUD PROVIDERS, USING POINTCLICKCARE'S CONSENT FUNCTIONALITY CONTRIBUTE TO INSIGHTS?

A SUD organization that is a Part 2 covered program, using our 42 CFR Part 2 compliant consent functionality, can view Insights from the Network and contribute non-collaborative Insights (which appear within the Insights section, but are not editable by viewing facilities). If the patient has not consented for their SUD provider to share information, Insights will not be seen by the rest of the care team on the Network.



## 14. HOW DO I FIND OUT WHAT TYPE OF ACCOUNT I HAVE OR HOW TO GET ONE?

Please contact your supervisor or your PointClickCare system administrator in your own organization for help with account access questions.

**OHA, OHLC, and HIT Commons manage the EDIE Utility in Oregon which leverages the PointClickCare network. If you have any other questions or need more information please reach out to:**

**PointClickCare Support Team**  
[cmt-support@pointclickcare.com](mailto:cmt-support@pointclickcare.com)

**HIT Commons**  
[HITInfo@hitcommons.org](mailto:HITInfo@hitcommons.org)