

# **TOHF eCW Workflow & Configuration Guide**

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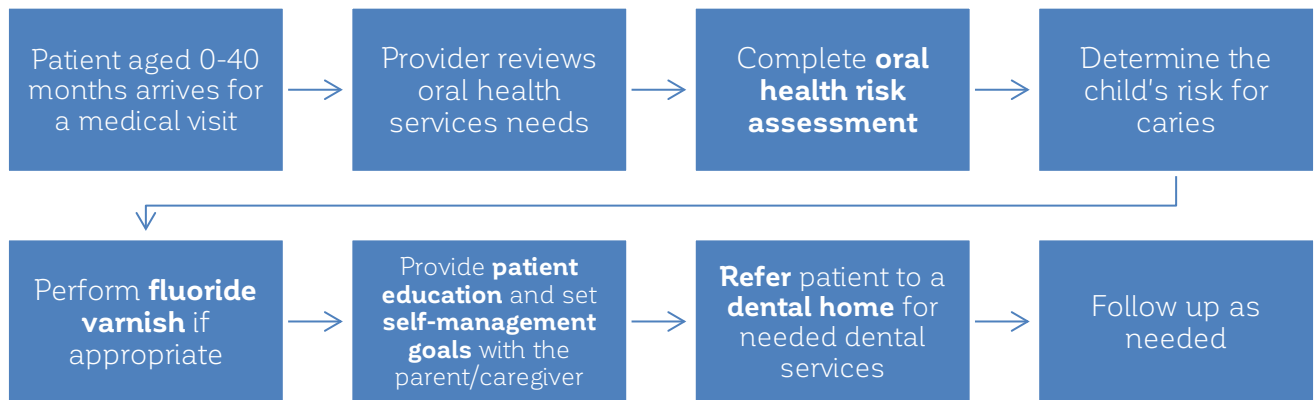
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## Logic, Specifications, & Documentation

Objective/Measure	Logic/Specifications	Evidence Required
<b>NOHI Project Metrics</b>		
Deliver preventive oral health care services. (Includes risk assessments, fluoride varnish, and referrals)	Unduplicated <u>non-dental providers</u> who completed training organized by the network who delivered one or more <u>preventive oral health services</u> to a patient in the target population during the reporting period	<b>Risk Assessment</b> (ICD10 Code: Z91.841, Z91.843) <b>Referral</b> (EHR Referral or SMART code) <b>Fluoride Varnish</b> (CPT code: 99188)
Parents/caregivers of pediatric patients aged 0-40 months in MCH safety net setting participating in the Network will increase their knowledge/awareness about preventive oral health practices	Unduplicated patients in the target population with documented <u>oral health education/anticipatory guidance/self-management goal</u> during the reporting period	<b>Oral Health Education/ Anticipatory Guidance/ Self-Management Goal</b> (SMART Code or Structured data)
Children aged 0-40 months in the MCH safety net setting participating in the Network will be referred for dental services (preventive and/or restorative), as appropriate	Unduplicated patients in the target population at <u>high risk</u> as determined by an <u>oral health risk assessment</u> with a documented <u>referral for dental services</u> by a non-dental clinical provider or a non-dental support service provider, during the reporting period	<b>Referral</b> (EHR Referral or SMART code) <b>High Risk</b> (ICD10 Code: Z91.843)
Children aged 0-40 months in MCH safety net setting participating in the Network will receive preventive oral health services (risk assessments, fluoride varnish, referrals)	Unduplicated patients in the target population seen for well-child, or other appropriate visit during the reporting period that received one or more <u>preventive oral health services</u> by a non-dental clinical provider, or a support service provider during the reporting period	<b>Risk Assessment</b> (ICD10 Code: Z91.841, Z91.843) <b>Referral</b> (EHR Referral or SMART code) <b>Fluoride Varnish</b> (CPT code: 99188)
<b>TOHF Specific Metrics</b>		
Target population patients receiving an oral health risk assessment	Unduplicated patients with a documented <u>oral health risk assessment</u> who are seen for a well-child or other appropriate medical visit during the reporting period	<b>Risk Assessment</b> (ICD10 Code: Z91.841, Z91.843)
Target population patients receiving education/anticipatory guidance/self-management goal	Unduplicated patients with documented <u>education/anticipatory guidance/self-management goal</u> who are seen for a well-child or other appropriate medical visit during the reporting period	<b>Oral Health Education/ Anticipatory Guidance/ Self-Management Goal</b> (SMART Code or Structured data)
Target population patients receiving fluoride varnish	Unduplicated patients with a documented <u>fluoride varnish</u> application who are seen for a well-child or other appropriate medical visit during the reporting period	<b>Fluoride Varnish</b> (CPT code: 99188)
Target population patients receiving a dental referral	Unduplicated patients with a documented dental <u>referral</u> who are seen for a well-child or other appropriate medical visit during the reporting period	<b>Referral</b> (EHR Referral or SMART code)

## eCW Documentation: Best Practice Workflow

To meet the project metrics, preventive oral health services must be integrated within the medical practice. The preventive oral health services include performing oral health risk assessment, providing oral hygiene patient education, fluoride varnish treatment, documenting oral health self-management goals, and sending referrals to dental care.



### Risk Assessment

The non-dental provider performs the pediatric oral health risk assessment during an appropriate visit with the patient. The provider documents the oral health risk assessment in the HPI section. The risk assessment is in the “Notes” column of the “Pediatric Oral Health” category. Complete the oral health risk assessment by clicking on the structured data fields in the “Value” column.

1. Navigate to the **Pediatric Oral Health** in the “Dental HPI” category.

c/o	Denies	Symptom	Duration	Notes
S		PEDIATRIC ORAL...		RISK FACTOR. Mother or primary caregiver ...
S		PREVENTIVE OR...		Risk Assessment Completed Yes , Caries Ri...

- Click on the “Notes” column to access the oral health risk assessment.

Dental HPI / Pediatric Oral Health

2

Find in Pediatric Oral Health

c/o	Denies	Symptom	Duration	Notes
S		PEDIATRIC ORAL...		
S		PREVENTIVE OR...		PEDIATRIC ORAL HEALTH RISK ASSESSMENT

- Complete the assessment by clicking on the “Value” column to respond to each structured value field.

HPI > Notes : PEDIATRIC ORAL HEALTH RISK ASSESSMENT (Test, NOHI -08/06/2020 02:30 pm, ANN VISIT)

3

Name	Value	Notes
<input type="checkbox"/> RISK FACTOR. Mother or primary caregiver ...		
<input type="checkbox"/> RISK FACTOR. Mother or primary caregiver ...		
<input type="checkbox"/> RISK FACTOR. Continual bottle or sippy c...		
<input type="checkbox"/> RISK FACTOR. Frequent snacking		
<input type="checkbox"/> RISK FACTOR. Special health care needs		
<input type="checkbox"/> RISK FACTOR. Medicaid eligible		
<input type="checkbox"/> PROTECTIVE FACTOR. Existing dental home		
<input type="checkbox"/> PROTECTIVE FACTOR. Drinks fluoridated wa ...		

- The responses might trigger a follow-up item, click on each field to complete the risk assessment.

Name	Value	Notes
<input type="checkbox"/> RISK FACTOR. Mother or primary caregiver ...	No	
<input type="checkbox"/> RISK FACTOR. Mother or primary caregiver ...	No	
<input type="checkbox"/> RISK FACTOR. Continual bottle or sippy c...	Yes	
<input type="checkbox"/> RISK FACTOR. Frequent snacking	No	
<input type="checkbox"/> RISK FACTOR. Special health care needs	No	
<input type="checkbox"/> RISK FACTOR. Medicaid eligible	Yes	
<input type="checkbox"/> PROTECTIVE FACTOR. Existing dental home	No	
<input type="checkbox"/> PROTECTIVE FACTOR. Drinks fluoridated wa ...	Yes	
<input type="checkbox"/> PROTECTIVE FACTOR. Fluoride varnish in t ...	No	
<input type="checkbox"/> PROTECTIVE FACTOR. Has teeth brushed twi ...	No	
<input checked="" type="checkbox"/> CLINICAL FINDING. White spots or visible ...	Yes	
<input type="checkbox"/> Child is at an absolute high risk for ca ...		
<input type="checkbox"/> CLINICAL FINDING. Obvious decay		High Risk Assessment Z91.843
<input type="checkbox"/> CLINICAL FINDING. Restorations, fillings ...		
<input type="checkbox"/> CLINICAL FINDING. Visible plaque accumul ...		

4

- Determine the child's risk for caries and document the diagnosis in **Assessment**.  
 Risk for dental caries, Low: ICD-10 Code Z91.841  
 Risk for dental caries, High: ICD-10 Code Z91.843

**Assessment** (Test, NOHI -08/06/2020 02:30 pm, ANN VISIT)

Pt. Info Encounter Physical Hub Education

Search: risk for caries

ICD-9	ICD-10	Diagnosis [Using Smart Search]
V15.89	Z91.843	Risk for dental caries, high
V15.89	Z91.841	Risk for dental caries, low
V15.89	Z91.842	Risk for dental caries, moderate
V15.89	Z91.849	At risk for dental caries
V15.89	Z91.849	Unspecified risk for dental caries

**Selected Assessments**

P	PL	Code	SNOMED	Diagnosis	Specify	Notes	Risk
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Z91.843	609402003	Risk for dental caries, high			x

## Preventive Oral Health Services

The provider completes the Preventive Oral Health Services Tool to determine the patient's oral health service needs.

- Navigate to HPI>Dental HPI> “Pediatric Oral Health” category.

**HPI** (Test, NOHI -08/06/2020 02:30 pm, ANN VISIT)

Pt. Info Encounter Physical Hub

Dental HPI / Pediatric Oral Health

Find in Pediatric Oral Health

c/o	Denies	Symptom	Duration	Notes
S		PEDIATRIC ORAL...		RISK FACTOR. Mother or primary caregiver ...
S		PREVENTIVE OR...		Risk Assessment Completed Yes , Caries Ri...

- Click on the “Notes” column to access the Preventive Oral Health Services Tool.

Dental HPI / Pediatric Oral Health

Find in Pediatric Oral Health

c/o	Denies	Symptom	Duration	Notes
S		PEDIATRIC ORAL...		
S		PREVENTIVE OR...		PREVENTIVE ORAL HEALTH SERVICES

- Complete the structured value fields by clicking on the “Value” column to respond to each item.

HPI Notes : PREVENTIVE ORAL HEALTH SERVICES (Test, NOHI -08/06/2020 02:30 pm, ANN VISIT)

3

Name	Value	Notes
<input type="checkbox"/> Risk Assessment Completed	Yes	
<input checked="" type="checkbox"/> Caries Risk	High	
<input type="checkbox"/> Child is at high risk for caries	High Risk Assessment Z91.843	
<input type="checkbox"/> Fluoride varnish treatment	Yes	
<input type="checkbox"/> Anticipatory guidance provided	Yes	
<input type="checkbox"/> Health Education sent to the portal or p ...	Yes	
<input type="checkbox"/> Dental referral provided	Yes	
<input type="checkbox"/> Other see notes		

- Perform oral health services as needed.

## Fluoride Varnish

The non-dental provider applies fluoride varnish and orders the “Fluoride Varnish” procedure to appropriately document the application in the progress note.

- Order the “Fluoride Varnish” procedure.

Manage Orders

1

Lab DI Procedure

fluoride

By Contains Type Both

Order Name: APP TOPICAL FLUORIDE VARNISH

Today's Orders

H	S	S	Description	Dx
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	APP TOPICAL FLUOR	Z91.843 - Risk for dental caries, hig

- Click “OK” on the ICD – CPT Association window to add the fluoride varnish application CPT code.

ICD - CPT Association

2

ICD Codes available for lab		CPT Codes available	
ICD Code	Description	CPT Code	Name
<input checked="" type="checkbox"/> Z91.843	Risk for dental caries, high	<input checked="" type="checkbox"/> 99188	APP TOPICAL FLUORIDE VARNISH

OK Cancel

- Provide the fluoride varnish treatment.

## Patient Education & Oral Health Self-Management Goals

The non-dental provider discusses oral health self-management goals with the patient and caregiver. This is documented in the Preventive Medicine section, category “Dental”. We recommend sending or printing patient education material for the caregiver.

1. Navigate to the “Dental” category in the **Preventive Medicine** section and click “Oral Health Self-Management Goals”.

The screenshot shows the 'Preventive Medicine' interface for a patient visit on 08/06/2020. The left sidebar has 'Dental' selected. The main table lists symptoms, with 'ORAL HEALTH SELF MANAGEMENT GOALS' highlighted. A tooltip for this item shows 'ORAL HEALTH SELF MANAGEMENT GOALS:'.

Symptom	Presence	Notes
S. ORAL HYGIENE:	>	
S. ORAL HEALTH SELF MANAGEMENT GOALS:	>	BEDTIME ROUTINE: brush before bedti... x

2. Click on the “Value” column to access the self-management goal items.

The screenshot shows the 'Notes: ORAL HEALTH SELF MANAGEMENT GOALS' interface. The 'Value' column is highlighted, and a dropdown menu is open, listing various self-management goal items with checkboxes.

Name	Value	Notes
<input type="checkbox"/> BEDTIME ROUTINE:	brush before bedtime	x
<input type="checkbox"/> BRUSHING:	use a soft-bristled toothbrush...	x
<input type="checkbox"/> PREVENTING CAVITIES:		x
<input type="checkbox"/> NUTRITION:		x
<input type="checkbox"/> THUMB-SUCKING:		x
<input type="checkbox"/> TEETH AND GUMS:		x
<input type="checkbox"/> ENAMEL FLUOROSIS:		x
<input type="checkbox"/>		x
<input type="checkbox"/>		x

Dropdown menu items for 'Value':

- [Select all]
- avoid child going to bed with bottle or su...
- avoid sugary, flavored drinks, or soda
- fruit juice should be fed in cup only at me...
- use fluoride drinking water
- at-will breast feeding should be stopped
- apply sealants to prevent tooth decay
- schedule regular dental-check ups to preve...
-



3. Select all items discussed with the parent/caregiver from the appropriate structured value field. See sample below of suggested oral health self-management goal options.

**Preventive Medicine:**

**Dental:**

**ORAL HEALTH SELF-MANAGEMENT GOALS:**

**BEDTIME ROUTINE:** *brush before bedtime*

**BRUSHING:** *use a soft-bristled toothbrush, brush twice daily, use toothpaste with fluoride, use only tiny pea-sized amount of toothpaste, brush the tongue, brush chewing surfaces of each tooth, prepare your child to spit out toothpaste after brushing*

**PREVENTING CAVITIES:** *avoid child going to bed with bottle or sugary liquids in prolonged contact with the teeth, can cause bottle caries, avoid sugary, flavored drinks, or soda, fruit juice should be fed in cup only at meals or snack-time, use fluoride drinking water, at-will breast feeding should be stopped after child's first primary tooth erupts, apply sealants to prevent tooth decay, schedule regular dental-check ups to prevent nursing caries or tooth decays*

**NUTRITION:** *balanced-diet helps prevent tooth-decay, food-groups included should be fruits, vegetables, grains, meats, beans and milk, diet rich with calcium, minerals, phosphorous, and proper levels of fluoride, limit number of snack times; choose nutritious snacks*

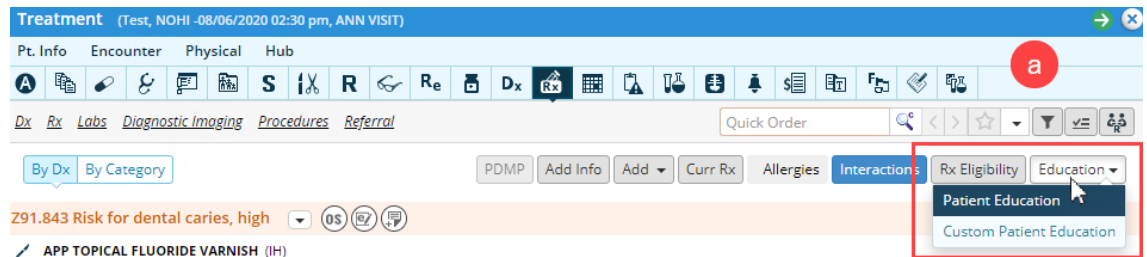
**THUMB-SUCKING:** *can cause tooth malalignment and proper mouth growth problems, may lead to future orthodontic treatment, help the child quit thumb-sucking, if child is sucking thumb due to anxiety help relieve anxiety, take note of when child is sucking thumb more (movies, car rides etc.), put a bandage on the thumb, put a sock over the hand at night, explain what will happen to child's teeth if they continue sucking, be positive and supportive, praise them for not sucking, let child know this not a punishment, reward the child for positive behavior, encourage child to put sticker for everyday they don't suck thumb, thumb-sucking should stop between ages 2-4*

**TEETH AND GUMS:** *after breast or bottle-feeding wrap one finger with a clean, damp wash cloth or piece of gauze and gently rub it across baby's gum tissues it clears baby's mouth and begins a process of good oral care, avoid sharing saliva through common use of feeding spoons or licking pacifiers*

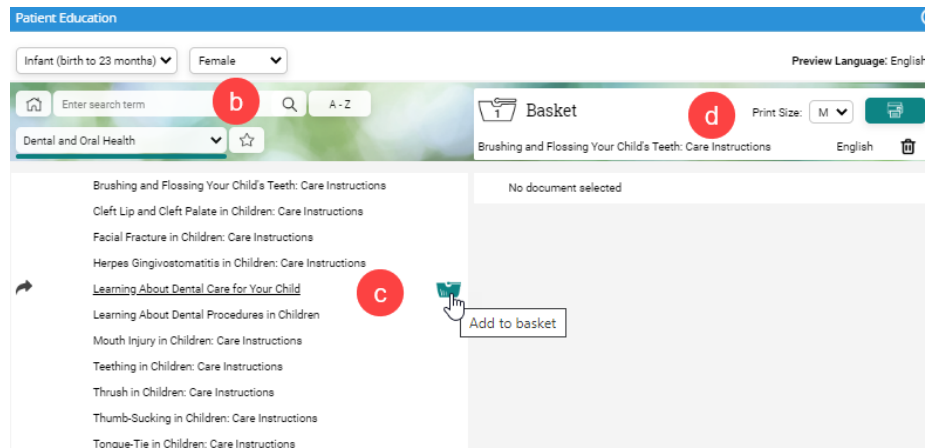
**ENAMEL FLUOROSIS:** *make sure child spits out toothpaste and does not swallow, too much fluoride can result in defects in tooth enamel, enamel may be rough, pitted, and hard to clean, check for tiny white specks or streaks on teeth, check for discolored or brown markings on teeth in severe cases*

3

4. Send oral health patient education material to the patient portal or print the handout for the parent/caregiver.
  - In the **Treatment** window, click on “Education” and select “Patient Education”.



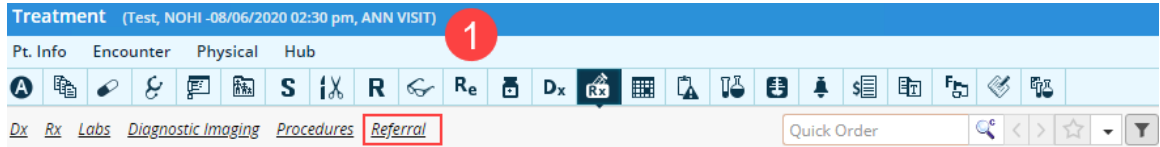
- Search for applicable patient education material.
- Select the material and click “Add to basket”.
- Click on “Print” or “Send”.



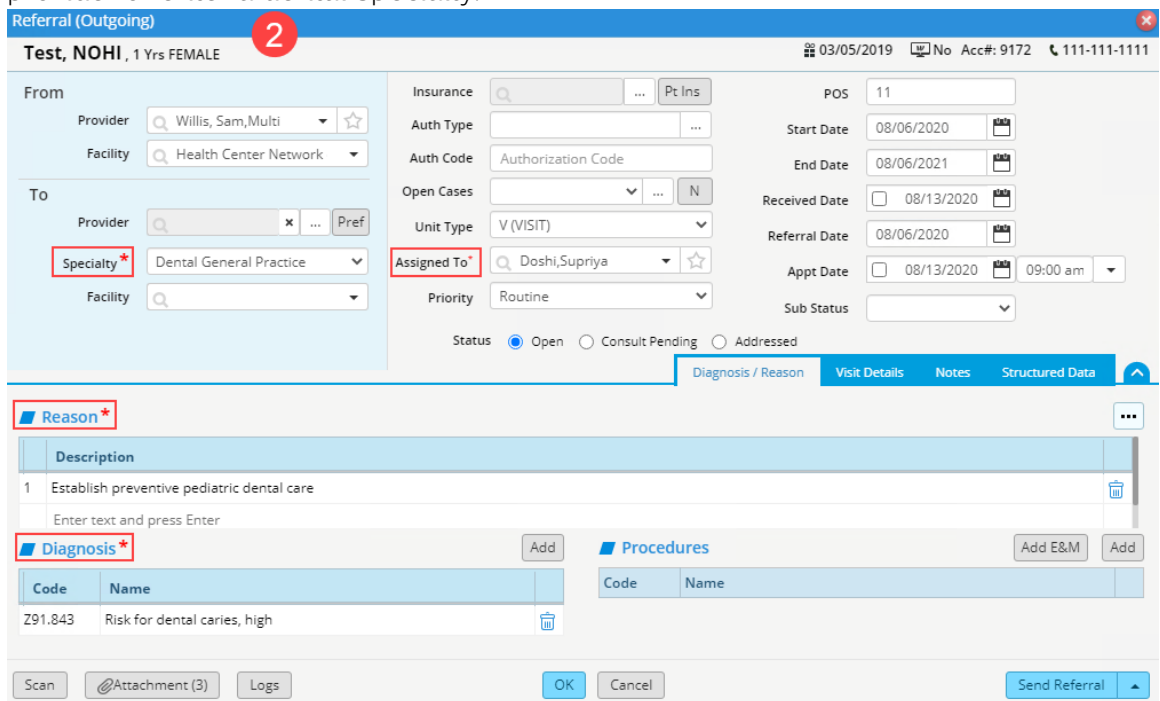
## Referrals

The non-dental provider refers the patient to a dental provider for preventive screening and/or dental care.

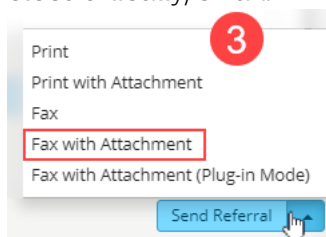
1. In the **Treatment** window click on “Referral”.



2. Complete the mandatory fields to send a referral. Be sure to select a dental provider or enter a dental specialty.



3. Assign the referral to a referral clerk/designee and send the referral electronically/e-fax.



4. Ensure the parent/caregiver understands to follow up with the dental appointment. Assess if the patient needs additional services.
5. The referral clerk/designee receives the assigned referral in the ‘R’ jellybean.
6. Contact the patient to assist with scheduling the appointment, or obtain the appointment information from the patient.

- Enter the date and time of the dental appointment in the “Appt Date” field.

- Update structured data fields for tracking and documentation to close the loop.

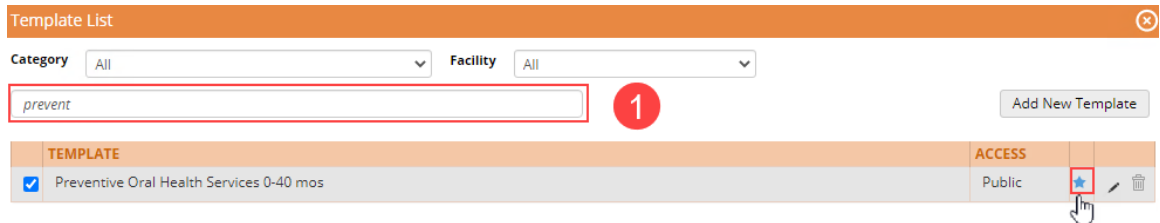
Name	Value	Notes
Appointment scheduled	Yes	
Seen by consulting provider		
Clinical consultation report received	mm/dd/yyyy	

**Tracking & Documentation Workflow:** We suggest implementing a workflow to address dental referrals. We recommend utilizing the “Structured Data” tab to track the process.

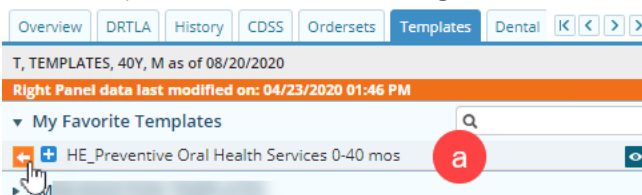
## Template for Progress Note

We suggest that the non-dental provider merges the “Preventive Oral Health Services 0-40 mos” template and associated order set in the progress note at a well-child visit or any other appropriate visit. This will ensure efficient documentation.

1. Find the **Preventive Oral Health Services 0-40 mos** template in the template list and add it as a favorite.



2. Navigate to the **Right Chart Panel/ICW** “Templates” tab and find the **Preventive Oral Health Services 0-40 mos** template in the “My Favorite Templates” list.
  - a. Click on the arrow to merge the **Preventive Oral Health Services 0-40 mos** template to the current Progress Note.

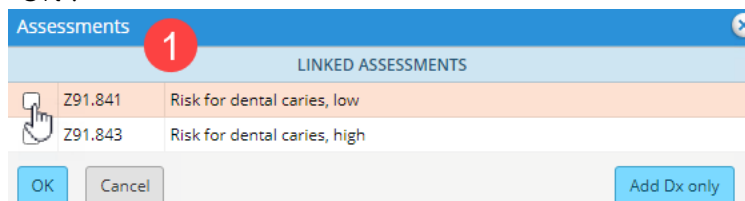


- b. Click on **+** to expand and click on the **OS** to access the order set associated with the template.

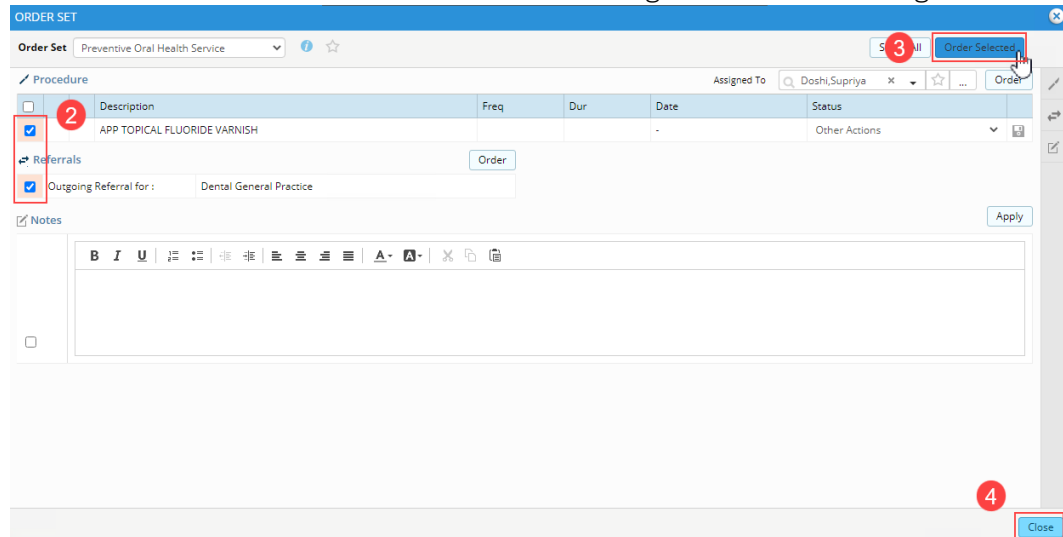


The order set provides a quick way to order what is needed for the patient.

- i. Select an appropriate **Linked Assessment** for the orders and click “OK”.



- ii. Check the boxes as needed to order the appropriate items.
- iii. Click “Order Selected” to order the items that are selected.
- iv. Close the order set window and navigate back to the Progress Note.



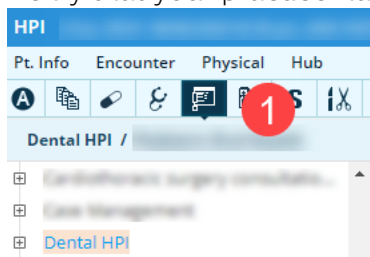
- 3. Complete the preventive oral health services documentation in the Progress Note.

# How to Configure Required Data Elements

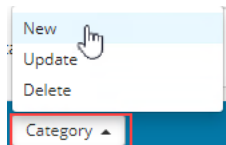
## Risk Assessment & Preventive Oral Health Services

Note: The same steps apply for the pediatric oral health risk assessment and preventive oral health services. Once the **pediatric oral health risk assessment** is configured, repeat the steps for the **preventive oral health** services list.

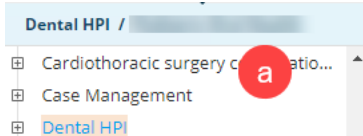
1. Verify that your practice has a “Dental” category in HPI.



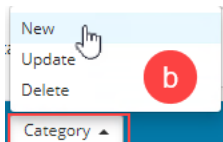
To add a new “Dental” category, select HPI, click on the category button and click on “New”.



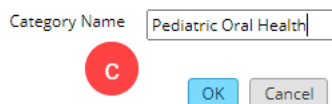
2. Create a “Pediatric Oral Health” subcategory.
  - a. Select “Dental HPI” category



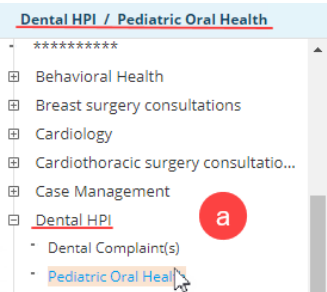
- b. Click on the “Category” button and click on “New”.



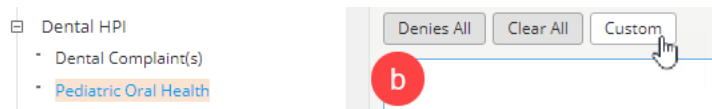
- c. Enter the subcategory name “Pediatric Oral Health”



3. Create a “Pediatric Oral Health Risk Assessment” custom structured “Symptom”.
  - a. Click on “Pediatric Oral Health” subcategory.



- b. Click on “Custom”.



- c. Click on “Add” and enter the property name “Pediatric Oral Health Risk Assessment”

HPI > Items: Pediatric Oral Health

Struct	Name	Options
✓	<u>PEDIATRIC ORAL HEALTH RISK ASSESSMENT</u>	
✓	PREVENTIVE ORAL HEALTH SERVICES	



- d. Click to change the type to “Structured”.

HPI > Items: Pediatric Oral Health

Struct	Name
	PEDIATRIC ORAL HEALTH RISK ASSESSMENT
	PREVENTIVE ORAL HEALTH SERVICES

click here to change type

4. Add the Custom Structured Value fields.
  - a. Navigate back to HPI>Dental>Pediatric Oral Health.

Dental HPI / Pediatric Oral Health

c/o	Denies	Symptom	D
S		PEDIATRIC ORAL...	
S		PREVENTIVE OR...	

- b. Click on the “Notes” column in Pediatric Oral Health Risk Assessment.

Dental HPI / Pediatric Oral Health  Show pop-up for c/o

c/o	Denies	Symptom	Duration	Notes
S		PEDIATRIC ORAL...		x
S		PREVENTIVE OR...		

- c. Click on “Custom”.

HPI Notes : Pediatric Oral Health Assessment (Test, NOHI -08/06/2020 02:30 pm, ANN VISIT)

Default Default For All Clear Clear All

Name	Value	Notes
------	-------	-------

OK Cancel

Custom

- d. Click on “Add” to add each structured data item.

Configure Structured Data for HPI > Notes:Pediatric Oral Health Assessment

Customize Structured Text  Grid  Wizard

Name	Type	Mandatory	Trigger	Default	Action
------	------	-----------	---------	---------	--------



- e. For each structured item, enter the name and the type, then click “OK”.

- f. If an item response type is “Structured Text”, follow these steps:  
 i. Select the line item and click “Customize Structured Text” to add the text.

- g. To add a child structured data item, follow these steps:  
 i. Select the line item and click on the + to add child.

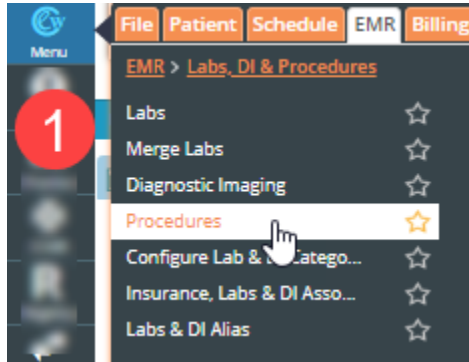
Name	Type	Mandatory	Trigger	Default	Action
Existing dental home	Boolean				+ [edit] [delete]
Drinks fluoridated water or takes fluo	Boolean				+ [edit] [delete]
Fluoride varnish in the last 6 months	Boolean				+ [edit] [delete]
Has teeth brushed twice daily	Boolean				+ [edit] [delete]
Continual bottle or sippy cup use with	Boolean				+ [edit] [delete]
Frequent snacking	Boolean				+ [edit] [delete]
<b>Mother or primary caregiver had active</b>	Boolean				+ [edit] [delete]
Child is at an absolute high risk for	Structured Text		Yes	High Risk Assessment Z91.843	+ [edit] [delete] <b>Add Child</b>
Mother or primary caregiver does not h	Boolean				+ [edit] [delete]

- ii. Enter the Name, Type and Trigger for the Child, then click “OK”.

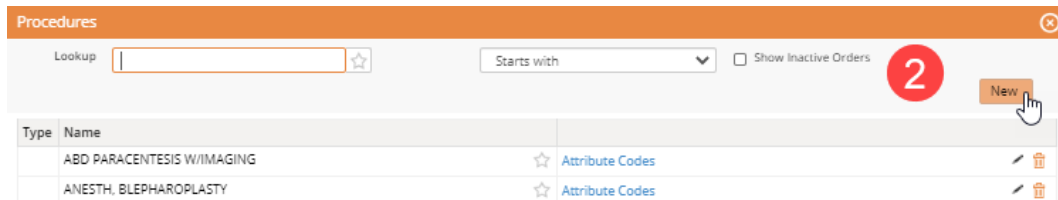


## Fluoride Varnish

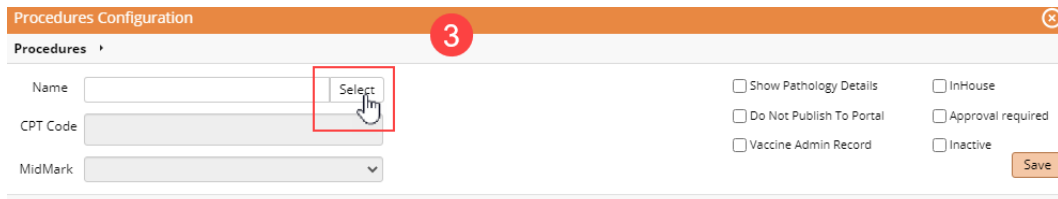
1. Navigate to Menu>EMR>Lab/DI/Procedures>Procedures.



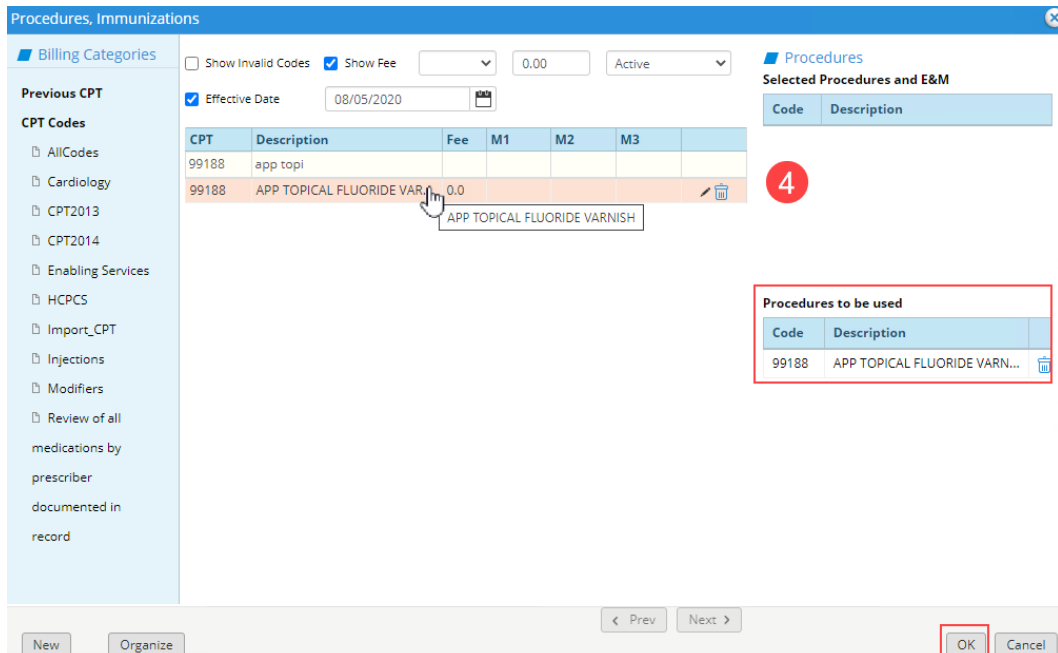
2. Click on “New”.



3. Click on “Select” to search for the Fluoride Varnish treatment CPT.



4. Click on the correct CPT and click “OK”.



5. Check the box to specify it is “InHouse” and click “Save”.

6. Look up the **Fluoride Procedure** and click on the **Pencil Icon** to edit.

7. Click “Add” to associate the CPT code.

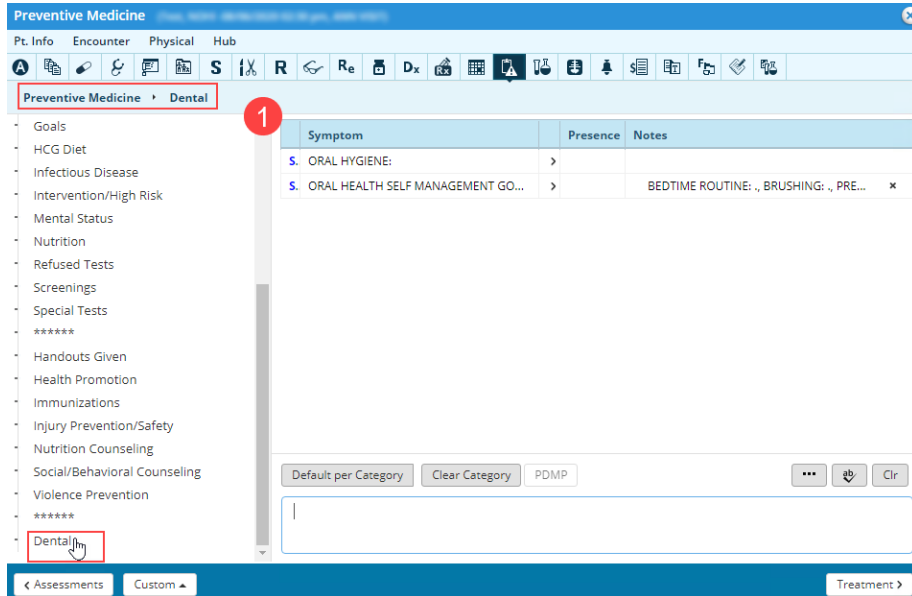
8. Search for the CPT code, select it, and click “OK”

Id	Chg. Code	CPT	Name	Fee	Allowed	Cost	POS	TOS	M1	M2	M3
366036	0	99188	APP TOPICAL FLUORIDE VARNISH	\$0.00	\$0.00	\$0.00					

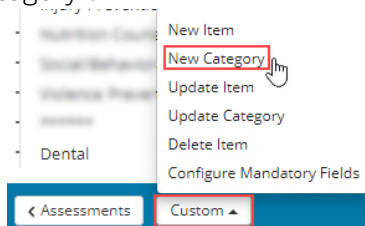
9. The new procedure is now added to your local compendium.

## Oral Health Self-Management Goals

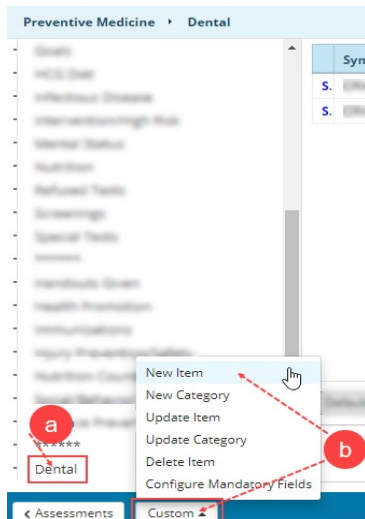
1. Verify that your practice has a “Dental” category in Preventive Medicine.



To add a New “Dental” Category, click on the “Custom” button and click on “New Category”.



2. Add a new structured item **Oral Health Self-Management Goals**.
  - a. Select the “Dental” category.
  - b. Click on “Custom” and select “New Item”.



- c. Enter the Name “Oral Health Self-Management Goals” and check the box “Structured”. Click “OK”.

3. Add the custom structured value fields.
  - a. Click on the “Notes” column.

- b. Click on the “Custom” button to add the structured data.

- c. Click on “Add” to add each structured item.

Configure Structured Data > Notes:ORAL HEALTH SELF MANAGEMENT GOALS:

Customize Structured Text C  Grid  Wizard Add Reorder

Name	Type	Mandatory	Trigger	Default	Action
▢ BEDTIME ROUTINE:	Structured Text (Mult...				+ ✓ 🗑
▢ BRUSHING:	Structured Text (Mult...				+ ✓ 🗑
▢ PREVENTING CAVITIES:	Structured Text (Mult...				+ ✓ 🗑
▢ NUTRITION:	Structured Text (Mult...				+ ✓ 🗑
▢ THUMB-SUCKING:	Structured Text (Mult...				+ ✓ 🗑
▢ TEETH AND GUMS:	Structured Text (Mult...				+ ✓ 🗑
▢ ENAMEL FLUOROSIS:	Structured Text (Mult...				+ ✓ 🗑
▢ FLOSSING:	Structured Text (Mult...				+ ✓ 🗑
▢ PREVENTING CAVITIES..	Structured Text (Mult...				+ ✓ 🗑

- d. Enter the name, select the type “Structured Text”, and check the box “Multi Select”.

Add Structured Data

Name d PREVENTING CAVITIES

Type Structured Text

Multi Select

Trigger

Mandatory

Default

OK Cancel

- e. To add the structured text for each item, select the item, and click on “Customize Structured Text”.

Configure Structured Data > Notes:ORAL HEALTH SELF MANAGEMENT GOALS:

Customize Structured Text e  Grid  Wizard Add Reorder

Name	Type	Mandatory	Trigger	Default	Action
▢ BEDTIME ROUTINE:	Structured Text (Mult...				+ ✓ 🗑
▢ BRUSHING:	Structured Text (Mult...				+ ✓ 🗑
▢ PREVENTING CAVITIES:	Structured Text (Mult...				+ ✓ 🗑
▢ NUTRITION:	Structured Text (Mult...				+ ✓ 🗑
▢ THUMB-SUCKING:	Structured Text (Mult...				+ ✓ 🗑
▢ TEETH AND GUMS:	Structured Text (Mult...				+ ✓ 🗑
▢ ENAMEL FLUOROSIS:	Structured Text (Mult...				+ ✓ 🗑
▢ FLOSSING:	Structured Text (Mult...				+ ✓ 🗑

- f. Add the Customized Structured Text options.

Customize Structured Text			
3	fruit juice should be fed in cup only	<input type="checkbox"/>	
4	use fluoride drinking water	<input type="checkbox"/>	
5	at-will breast feeding should be stop	<input type="checkbox"/>	
6	apply sealants to prevent tooth dec.	<input type="checkbox"/>	
7	schedule regular dental-check ups t	<input type="checkbox"/>	
8	--	<input type="checkbox"/>	
Add the text here		<input type="checkbox"/>	

## Referrals

1. Skip this step if your practice is not utilizing structured data tab to document & track the referral process and close the loop.
2. In the **Structured Data** tab, click on "Custom".

Referral (Outgoing) - Test, NOHI, 1 Yrs FEMALE

03/05/2019 No Acc#: 9172 111-111-1111

From: Willis, Sam, Multi; Facility: Health Center Network

To: Dental General Practice

Structured Data tab selected.

Custom button highlighted with red circle 2.

3. Click "Add" to add the custom structured fields.

Configure Structured Data

Customize Structured Text

Grid Wizard Add Reorder

Name	Type	Mandatory	Trigger	Default	Action
Appointment scheduled	Boolean				+ [checkbox] [trash]
Seen by consulting provider	Boolean				+ [checkbox] [trash]
Clinical consultation report received	Date				
Report of clinical encounter received	Date				
Confirmatory consultation report recei	Date				



## Order Set

1. To create the Preventive Oral Health Service 0-40 mos Order Set, ensure the fluoride varnish procedure was created.

2. Navigate to Menu>EMR>Order Set Administration, the order set window will open.

3. Click on “New” to create a new Order Set.

4. Enter the Order Set Description and select “No” for the Quick Order Set option. Click “OK”.

5. Click on “Update”.

6. Check "Same as trigger" box.

**Update Order set**

Order Set Description\*

Order Set Measure

Diagnoses (Trigger)  **6**

Diagnoses (Linked)   Same as trigger

Age (Trigger)  Apply to all age  
 From:  Y  M  
 To:  Y  M

Gender (Trigger)  Male  Female  Unknown

Quick Order Set  No  Yes

7. Click "Add" to add Diagnoses to Trigger the Order Set.

**Update Order set**

Order Set Description\*

Order Set Measure

Diagnoses (Trigger)  **7**

Diagnoses (Linked)   Same as trigger

Age (Trigger)  Apply to all age  
 From:  Y  M  
 To:  Y  M

Gender (Trigger)  Male  Female  Unknown

Quick Order Set  No  Yes

- a. Search for “Risk for Dental Caries” ICD-10 Codes, select the **Assessments** and click “OK”.

**Select Assessments** T, TEMPLATES

Smart Search

ICD-9 ICD-10 Diagnosis

Q risk for dental caries

V15.89	Z91.843	Risk for dental caries, high
V15.89	Z91.841	Risk for dental caries, low
V15.89	Z91.842	Risk for dental caries, moderate
V15.89	Z91.849	At risk for dental caries
V15.89	Z91.849	Unspecified risk for dental caries
V15.89	Z91.841	At low risk for dental caries

**Selected Assessment(s)**

Code	Diagnosis
Z91.843	Risk for dental caries, high
Z91.841	Risk for dental caries, low

OK Cancel

8. Update the “Age (Trigger)” in the order set to 0-40 months.

**Update Order set**

Order Set Description\* Preventive Oral Health 0-40 mo

Order Set Measure

Diagnoses (Trigger) Add

Diagnoses (Linked) Add  Same as trigger

Age (Trigger)  Apply to all age

From: 0 Y 0 M

To: 3 Y 4 M

Gender (Trigger)  Male  Female  Unknown

Quick Order Set  No  Yes

OK Cancel

9. Select “No” for the Quick Order Set and Click “OK”.

From: 0 Y 0 M

To: 3 Y 4 M

Gender (Trigger)  Male  Female  Unknown

Quick Order Set  No  Yes

OK Cancel

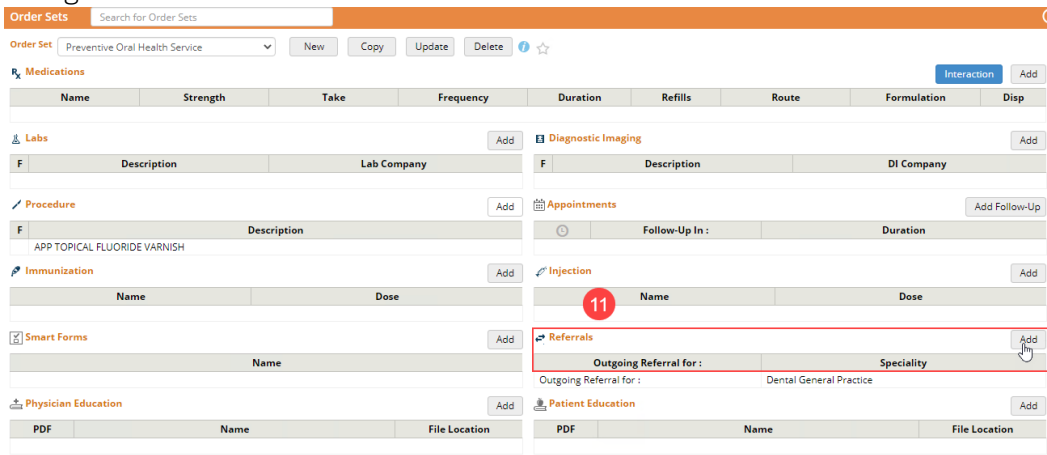
10. Navigate to **Procedure** and Click “Add” to add a procedure to the order set.

The screenshot shows the 'Order Sets' interface for 'Preventive Oral Health Service'. The 'Procedure' section is highlighted with a red box, and the 'Add' button next to it is also highlighted. A red circle with the number '10' is placed over the 'Add' button.

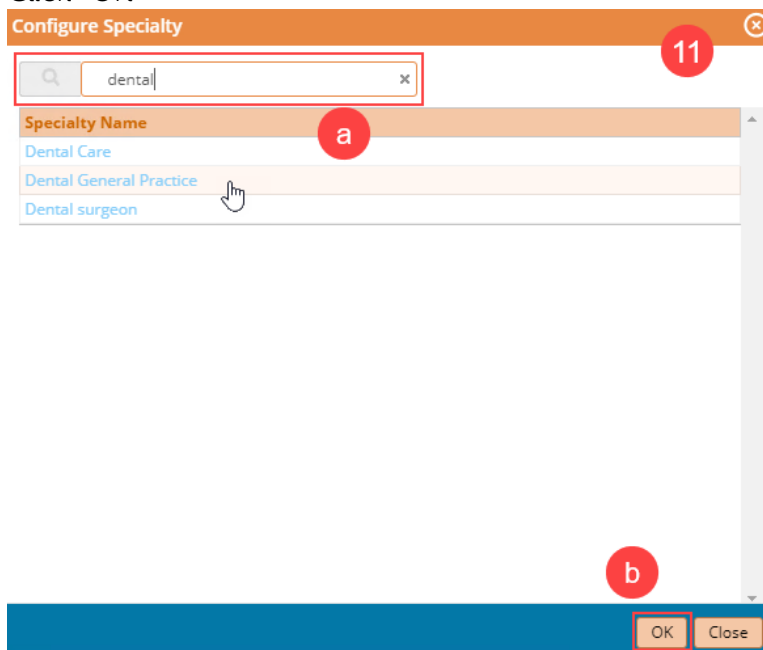
- Ensure the diagnoses is on the left of the window.
- Search for the Fluoride Varnish procedure.
- Click on the order to add it to Today’s Orders.
- Close the window.

The screenshot shows the 'Manage Orders' window. The search bar contains 'fluoride' (b), the 'Add Dx' button is highlighted (a), the 'APP TOPICAL FLUORIDE VARNISH' order is selected (c), and the 'Close' button is highlighted (d).

11. Navigate to **Referrals** and click “Add” to add a referral to the order set.



- a. Search and select a dental specialty
- b. Click “OK”



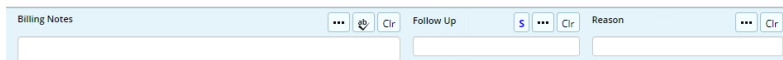
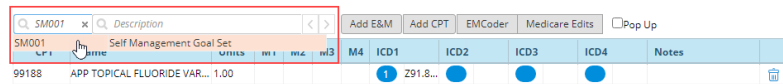
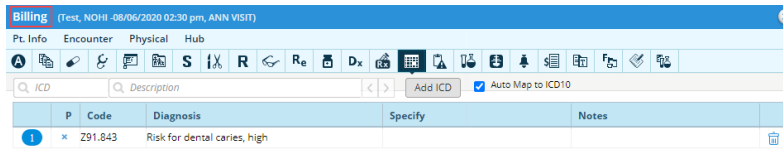
12. Add any other items as needed to the order set.

## Template

1. To create the **Preventive Oral Health Services 0-40 mos Template**, ensure the following items are configured: oral health risk assessment & preventive oral health services in HPI, oral health self-management goals in preventive medicine and the preventive oral health 0-40 mos order set.
2. Create an appointment for a “Test” patient and follow the workflow above to document the preventive oral health services in the Progress Note.

Note: If the practice is using a SMART Code to report a service such as counseling or referrals, add the SMART code to the template.

To add the SMART code, navigate to the **Billing** window and add the CPT code.



### 3. Save the note as a template.

⚙ Patient: Test, NOHI DOB: 03/05/2019 Age: 17M 1D Sex: Female

#### Subjective:

Chief Complaint(s):

HPI:

Pediatric Oral Health

#### PEDIATRIC ORAL HEALTH RISK ASSESSMENT

- RISK FACTOR. Mother or primary caregiver had active decay in the past 12 months .
- RISK FACTOR. Mother or primary caregiver does not have a dentist .
- RISK FACTOR. Continual bottle or sippy cup use with fluid other than water .
- RISK FACTOR. Frequent snacking .
- RISK FACTOR. Special health care needs .
- RISK FACTOR. Medicaid eligible .
- PROTECTIVE FACTOR. Existing dental home .
- PROTECTIVE FACTOR. Drinks fluoridated water or takes fluoride supplements .
- PROTECTIVE FACTOR. Fluoride varnish in the last 6 months .
- PROTECTIVE FACTOR. Has teeth brushed twice daily .
- CLINICAL FINDING. White spots or visible decalcifications in the past 12 months .
- CLINICAL FINDING. Obvious decay .
- CLINICAL FINDING. Restorations, fillings present .
- CLINICAL FINDING. Visible plaque accumulation .
- CLINICAL FINDING. Gingivitis, swollen or bleeding gums .
- CLINICAL FINDING. Teeth present .
- CLINICAL FINDING. Healthy teeth .

#### PREVENTIVE ORAL HEALTH SERVICES

- Risk Assessment Completed .
- Caries Risk .
- Fluoride varnish treatment .
- Anticipatory guidance provided .
- Health Education sent to the portal or printed .
- Dental referral provided .
- Other see notes .

Current Medication:

Medical History:

Allergies/Intolerance:

Gyn History:

OB History:

Surgical History:

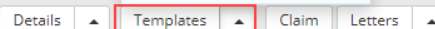
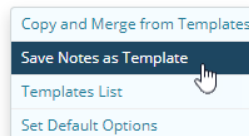
Hospitalization:

Family History:

Social History:

ROS:

3



- Name the template “Preventive Oral Health Services 0-40 mos” and mark the template “Public”.

Template List

Template List Create/Update Template

4

Name: HE\_Preventive Oral Health Services 0-40 mos

Description: TOHF Oral Health Services

Facility: All

Visit Type:

Category: General

Access:  Private  Public

Associated Order Sets:

- \*Alcohol Smartform Quick OS
- \*PHQ2 Smartform Quick OS
- \*HE\_Medicare AWW
- \*PRAPARE Quick OS
- \*Cervical Cancer(Pap) Quick OS
- \*Cholesterol Screen Quick OS
- Preventive Oral Health Service
- \*Fluoride Varnish Med Quick OS
- \*HIV Screening Quick OS
- \*A1C Test Quick OS

Add as Favorite

OK Cancel

- Associate the “Preventive Oral Health 0-40 mo” Order Set by checking the box to select it. Click “OK” to save the template.

Template List

Template List Create/Update Template

Name: HE\_Preventive Oral Health Services 0-40 mos

Description: TOHF Oral Health Services

Facility: All

Visit Type:

Category: General

Access:  Private  Public

Associated Order Sets:

- \*Alcohol Smartform Quick OS
- \*PHQ2 Smartform Quick OS
- \*HE\_Medicare AWW
- \*PRAPARE Quick OS
- \*Cervical Cancer(Pap) Quick OS
- \*Cholesterol Screen Quick OS
- Preventive Oral Health Service
- \*Fluoride Varnish Med Quick OS
- \*HIV Screening Quick OS
- \*A1C Test Quick OS

Add as Favorite

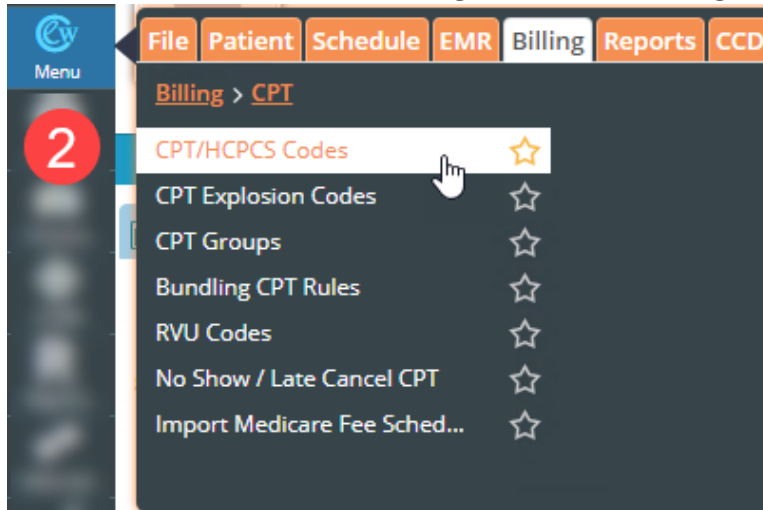
OK Cancel

5

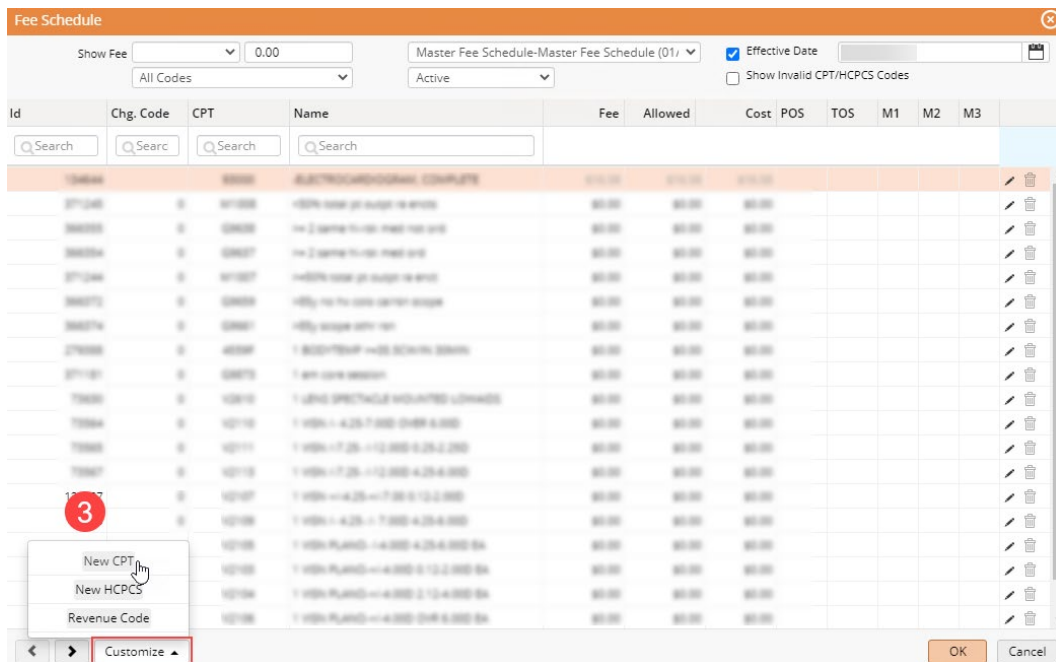
- Review the template to ensure all workflow items are included.

## SMART Code

1. Skip this step if your practice is not utilizing SMART codes to report on services.
2. To add a new SMART Code, Navigate to Menu>Billing>CPT>CPT Codes.



3. Click on “Customize” and select “New CPT”.





4. Enter the appropriate information to add the New SMART CPT Code.
  - CPT: SM001
  - Name: Self Management Goal Set
  - Enter Place of Service and Type of Service
  - Check the option to “Suppress Claim Edit that warns if Billed fee is < = \$0”
  - Add the descriptions

CPT/HCPCS Code 4

Fee Schedule | Descriptions | Associated Codes | Dental CPT Info

CPT / HCPCS: SM001 x

Name: Self Management Goal Set x

Place of Service: 50 - FEDERALLY QUALIFIED HEALTH CENTER

Type of Service: [Dropdown]

Mod1: [Dropdown] Mod3: [Dropdown]

Mod2: [Dropdown] Global Billing: [Dropdown] Days: [Dropdown]

Required CLIA ID     Requires Mammography Certification Number

Inactive     Qualifies for HPSA Incentive

Suppress Claim Edit that warns if Billed fee is < = \$0

Min. Units: [Input] Anesthesia Base Units: 0

Max. Units: [Input] Service Id Qualifier: [Input] Leave as Blank for HC

**CPSP**

Max. Units Allowed: [Input] Minutes per Unit: [Input]

Name	Unit Fee	Allowed Fee	
Search by name: All Fee Schedule			
Master Fee Schedule(2020-01/01/2020-1...			[Edit] [Delete]
Master Fee Schedule(Master Fee Schedule...			[Edit] [Delete]
Slide A(-01/01/2020-12/31/2020)			[Edit] [Delete]
Slide B(-01/01/2020-12/31/2020)			[Edit] [Delete]
Slide C(-01/01/2020-12/31/2020)			[Edit] [Delete]
Slide D(-01/01/2020-12/31/2020)			[Edit] [Delete]
Slide E(-01/01/2020-12/31/2020)			[Edit] [Delete]

<< Prev 1 Next >>    Fee Schedule Update Log

Associated CPT Groups OK Cancel

5. Suppress the SMART codes from insurance billing.
  - a. Click on the to update the Master Fee Schedule.

CPT/HCPCS Code

Fee Schedule | Descriptions | Associated Codes | Dental CPT Info

CPT / HCPCS: SM001 Id: 377759

Name: Self Management Goal Set

Place of Service: 50 - FEDERALLY QUALIFIED HEALTH CENTER

Type of Service: [Dropdown]

Mod1: [Dropdown] Mod3: [Dropdown]

Mod2: [Dropdown] Global Billing: 0 Days

Required CLIA ID     Requires Mammography Certification Number

Inactive     Qualifies for HPSA Incentive

Suppress Claim Edit that warns if Billed fee is < = \$0

Min. Units: 1 Anesthesia Base Units: 0

Max. Units: 1 Service Id Qualifier: [Input] Leave as Blank for HC

**CPSP**

Max. Units Allowed: 0 Minutes per Unit: 0

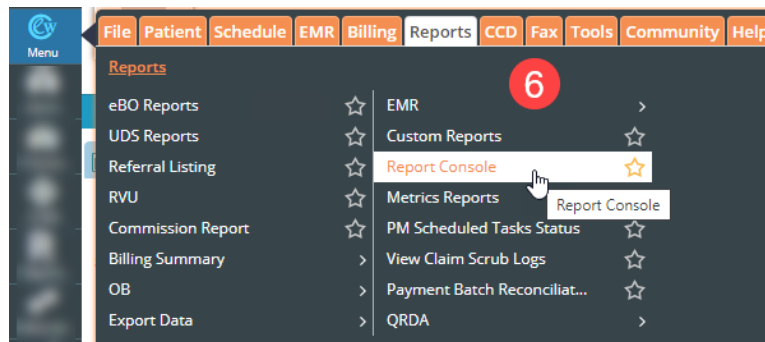
Name	Unit Fee	Allowed Fee	
Search by name: All Fee Schedule			
Master Fee Schedule(2020-01/01/2020-1...	0.00	0.00	[Edit] [Delete]
Master Fee Schedule(Master Fee Schedule...	0.00	0.00	[Edit] [Delete]
Slide A(-01/01/2020-12/31/2020)	0.00	0.00	[Edit] [Delete]
Slide B(-01/01/2020-12/31/2020)	0.00	0.00	[Edit] [Delete]
Slide C(-01/01/2020-12/31/2020)	0.00	0.00	[Edit] [Delete]
Slide D(-01/01/2020-12/31/2020)	0.00	0.00	[Edit] [Delete]
Slide E(-01/01/2020-12/31/2020)	0.00	0.00	[Edit] [Delete]

<< Prev 1 Next >>    Fee Schedule Update Log

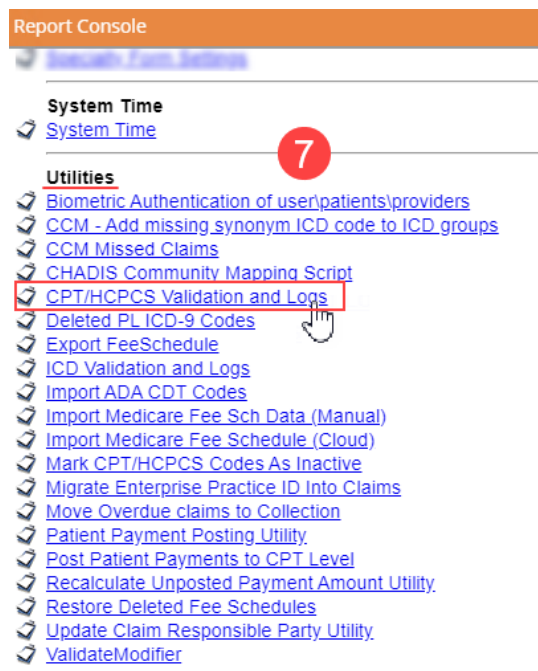
Associated CPT Groups OK Cancel

b. Check the box “Bill to Patient Only”

6. Navigate to Menu>Reports>Report Console to validate and activate the new code.



7. Scroll to the **Utilities** section and click “CPT/HCPCS Validation and Logs”.



8. Search for the CPT/SMART code, select the correct new code, enter the valid “From” and “To” dates and click “Submit”.

Report Console ⓧ

**8**

Please type the CPT that needs to be validated

CPT :   [View CPT validation logs](#)

Found the following CPT(s) in the database

CPT	Description
<input checked="" type="checkbox"/> SM001	Self Management Goal Set

Valid From   Valid To

 [RETURN TO REPORTS CONSOLE](#)

## Reporting Templates

### NOHI Project Metric Report Template (Baseline and Every 6 Months)

Metric Name	Description	Numerator	Denominator
NOHI 3 - 1	Patients with oral health education/ anticipatory guidance/ self-management goal	# of unduplicated patients with documented education/ anticipatory guidance/ self-management goal during the reporting period, set in a visit with a non-dental provider. <input type="text"/>	# of unduplicated patients in the target population who are seen for a well-child or other appropriate non-acute visit during the reporting period. Non-dental visits only <input type="text"/>
NOHI 4 - 1	High risk population with a documented referral	# of unduplicated patients in the target population at high risk as determined by an oral health risk assessment with a documented referral for dental services by a non-dental clinical provider or a non-dental support service provider, during the reporting period. <input type="text"/>	# of unduplicated patients in the target population at high risk (as determined by an oral health risk assessment) in a well-child or other appropriate non-acute visit during the reporting period. Non-dental visits only <input type="text"/>
NOHI 5 - A	Preventive oral health services are activities that aim to improve and maintain good oral health and function by reducing the onset and/or development of oral diseases or deformities and the occurrence of orofacial injuries. Examples of preventive oral health services include oral hygiene instruction, fluoride treatment, and dental sealants.	# of unduplicated patients in the target population seen for well-child, dental, or other appropriate visit during the reporting period that received one or more preventive oral health services by a dental provider, a non-dental clinical provider, or a non-dental support service provider during the reporting period. <input type="text"/>	# of unduplicated patients in the target population seen for well-child, dental, or other appropriate visit during the reporting period. <input type="text"/>
NOHI 5 - A1	Total number of preventative oral health services provided	Report total # of preventative oral health services (any of the 3 below in 5 - A2 through 5 - A4) <input type="text"/>	N/A – Count only. Report in Numerator Column.
NOHI 5 - A2	Total number of risk assessments conducted	Report total # of preventative oral health services by type: Risk Assessment <input type="text"/>	N/A – Count only. Report in Numerator Column.
NOHI 5 - A3	Total number of fluoride varnish treatments conducted	Report total # of preventative oral health services by type: Fluoride Varnish Treatment <input type="text"/>	N/A – Count only. Report in Numerator Column.
NOHI 5 - A4	Total number of referrals conducted	Report total # of preventative oral health services by type: Referrals <input type="text"/>	N/A – Count only. Report in Numerator Column.

## TOHF Specific Reporting Template (Monthly)

Metric Name	Description	Numerator Definition	Denominator Definition
TOHF - 1	Percentage of PHC Providers completing OH Training	# of unduplicated medical providers completing oral health training established by the PHC <input type="text"/>	# of unduplicated medical providers providing care to children in the target population <input type="text"/>
TOHF - 2	Percentage of target population patients receiving a Risk Assessment	# of unduplicated patients with a documented oral health risk assessment who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>	# of unduplicated patients in the target population who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>
TOHF - 3	Percentage of target population patients receiving Education/Anticipatory Guidance/Self-Management Goal	# of unduplicated patients with documented education/anticipatory guidance/self-management goal who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>	# of unduplicated patients in the target population who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>
TOHF - 4	Percentage of target population patients receiving Fluoride Varnish	# of unduplicated patients with a documented fluoride varnish application who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>	# of unduplicated patients in the target population who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>
TOHF - 5	Percentage of target population patients receiving a Dental Referral	# of unduplicated patients with a documented dental referral who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>	# of unduplicated patients in the target population who are seen for a well-child or other appropriate medical visit during the reporting period <input type="text"/>

## Additional Support

If you have any questions or need assistance, send an email to [support@healthefficient.org](mailto:support@healthefficient.org).

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