Instructions

Using the EPT deliverable portal, please complete the prompts for all questions in this template.

This EPT milestone is: Adopt evidenced-based clinical guideline(s) related to KPI metrics for selected population of focus. Monitor adherence to guideline(s) for providers to ensure standardization in practice. This includes communication of guidelines to staff, adapting workflows based on clinical guidelines for patients seen and not seen in clinic, integration of guidelines into the EHR, and tracking provider/care team adherence to guidelines.

Question 1: Clinical Guideline Adoption for Selected Population of Focus

Response Criteria:

- **Do you use these guidelines:**
    - Response should have at least one option selected and it should also describe any changes or other guidelines used if the selected guideline is not used.
- **Who selects, reviews, and tailors clinical guidelines into clinic policy at your practice(s)? (Please list the title or role of the person(s) responsible**
    - The response clearly identifies the name and title for at least one person who selects, reviews and tailors clinical guidelines. A role/title without a specific name is also acceptable (e.g., Chief Medical Officer would meet the requirements of this question).
- **How often are guidelines reviewed?**
    - The submission provides a specific timeline/periodicity for when guidelines are reviewed.
- **How are clinical guideline-related policies updated and approved at your practice?**
    - The submission should list at least 2 steps that indicate they have a process in place to update clinical guidelines and approve updates to clinical guidelines.

Pass:
The response addresses all four prompts in this section and provides an understanding of guidelines that are used for the POF, the staff who are involved in selecting/reviewing/tailoring clinical guidelines, a specific timeframe for guideline review (e.g., yearly, every other year) and a process to update and approve guidelines that includes at least two discrete activities.

Fail:
If any prompt isn't addressed, the response fails. The response also fails if the following

are not clearly described: specific staff or roles to update and approve clinical guidelines, the frequency of guideline review, and at least two discrete steps to adopt and update clinical guidelines.

Question 2: Communication and Staff/Clinician Engagement

Response Criteria:

- **How are staff involved in clinical guideline review?**
  - Response describes how staff are involved in clinical guideline review
- **How are providers and staff trained or oriented around guidelines and related clinic policies?**
  - Response describes at least 1 way that providers and staff are trained and oriented around guidelines and related clinic policies.
- **How are updates to guidelines and related policies communicated to staff and clinicians?**
  - Response describes a specific process and/or mechanism to communicate guideline updates to providers and staff.

Pass:
All three prompts have responses and the submission identifies a clear set of activities to engage, train, and communicate clinical guidelines and updates to providers and staff.

Fail:
If any of the prompts are blank, the submission fails. The submission also fails if each prompt doesn't include at least 1 concrete activity or mechanism to facilitate engagement or communication.

Question 3: Workflow Adaptation

Response Criteria:

- **One example of a workflow our practice uses to implement clinical guidelines is . . .**
  - The response should describe at least one workflow, protocol, or tool that helps aid them with using the clinical guideline.

- **One example of a standing orders and/or standardized protocols we use to implement a clinical guideline is . . .**
  - The response to this question is not scored

- **Are pre-visit planning or flagging tools used?**
  - The response to this question is not scored

Pass:
Responses to all three prompts are included. The response clearly describes at least one workflow, protocol, or tool that facilitates use of the clinical guideline.

Fail:
If any of the prompts are blank, the submission fails. The submission also fails if it doesn't describe at least one workflow, protocol or tool.

Question 4: EHR/Data Integration

Response Criteria:

- **Are clinical guidelines incorporated into the EHR (or EHR-linked PHM platform)?**
  - A response is selected from the options provided.
- **If yes/partially, describe how:**
  - A response is selected from the options provided.
- **How is the EHR and/or PHM system used to identify care gaps for this clinical guideline?**
  - Response describes at least one specific instance of how the practice uses EHR and/or PHM systems to identify care gaps

Pass:
Responses to the first and third prompt are included.

Fail:
The submission fails if it does not include a response to first prompt or third prompt.

Question 5: Monitoring Provider/Care Team Adherence

Response Criteria:

- **What indicators and data are used to track adherence to the clinical guideline?**
    - At least one indicator and/or one data type should be listed
- **Who reviews adherence data?**
    - At least one option should be selected
- **How often is adherence reviewed?**
    - At least one option should be selected
- **Describe challenges and/or barriers to adhering to the clinical guideline**
    - At least two challenges and/or barriers should be described
- **What actions has your practice taken to address gaps in adherence**
    - At least two actions should be described

Pass:
To pass, all prompts must have responses. In addition, submissions should include: at least one indicator or data source to track adherence, at least two challenges or barriers to adherence, and at least 2 actions to address adherence gaps.

Fail:
The submission fails if any prompt was left blank. The submission also fails if it doesn't describe at least data or indicator type, at least 2 challenges/barriers, and at least 2 actions to address gaps in adherence.