CCD COMPONENTS





TITLE: MY CONDITIONS OVERVIEW CCD SECTION: PROBLEMS **DESCRIPTION:** An index of current and past conditions represented in a concise way and in language that the patient can understand with prompts to have a conversation at the next visit. ★ ACTIVE Medical Name (Nick Name) PATIENT'S VOICE: I'd like to have a conversation about this I don't understand. What does this condition with my doctor mean? I have questions, when can I discuss them? Resolved Medical Name (Nick Name) Description I'd like to have a conversation about this with my doctor **PATIENT NEEDS:** Resolved Medical Name (Nick Name) Description ☐ I'd like to have a Represent what I truly care about. conversation about this with my doctor Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY BLOOD PRESSURE CCD SECTION: VITALS **DESCRIPTION:** A time line view of a patient's vitals that places them in context and highlights trends. MY BLOOD PRESSURE Jan 2010 Mar 2010 May 2010 Jul 2010 Sep 2011 Range PATIENT'S VOICE: High Are my levels ok? What's my trend? Above Normal 141 - 160 Normal 100 -140 **PATIENT NEEDS:** Low Represent what I truly care about. 100 -Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. \square Enable me to quickly build strong $\hfill\square$ Enable me to quickly spot clean and validated data. rapport with new patients.

TITLE: MY LAB RESULTS (1/2)

MY BLOOD LAB RESULTS CRITICAL AT RISK **OPTIMAL** GLUCOSE NORMAL: 3.5 - 5.5 **POTASIUM** WHAT DOES HIGH LDL MEAN? LDL NORMAL:85-100 "BAD" CHOLESTEROL ☐ I WANT TO TALK MORE ABOUT THIS HDL NORMAL:60-90 "GOOD" CHOLESTEROL WHAT DOES LOW CHLORIDE MEAN? CHLORIDE NORMAL:96-113 ☐ I WANT TO TALK MORE ABOUT THIS

PHYSICIAN NEEDS

\square Allow me to add additional information.	☐ Allow me to communicate privately with
	other physicians.

☐ Enable me to d	uickly spot clean and
validated data.	

☐ Enable me to quickly build st	trong
rapport with new patients.	

DESCRIPTION:

A continuum presenting lab results in context and with call-outs to educate patients and prompts to start conversations at the next visit.

CCD SECTION: RESULTS

PATIENT'S VOICE:

What do these results mean?

Are my results OK?

Can I have a conversation about this?

PATIENT NEEDS:

]	Represent what I	truly	care	about.
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- Present information in a way I can relate to.
- \square Help me cross-check my facts.
- Help me close communication loops amongst my care team.
- Set me up to have clarifying and guiding conversations.
- ☐ Clearly lay out the next steps.
- ☐ Help me see my trajectory over time.

CCD SECTION: RESULTS TITLE: MY LAB RESULTS (2/2) **DESCRIPTION:** A continuum presenting lab results in context and with call-outs to educate patients and prompts to start conversations at the next visit. **♦** BLOOD WORK (HEMATOLOGY) PATIENT'S VOICE: HEMOGLOBIN VALUE (HGB) (Normal: 14-18 g/dl) What do these results mean? WHAT DOES THIS MEAN? Are my results 0K? HIGH Can I have a conversation about this? \square I WANT TO TALK MORE ABOUT THIS NORMAL **PATIENT NEEDS:** Represent what I truly care about. Present information in a way I can **APR '00** FEB '09 **MAR '10** JUN '11 relate to.

TITLE: MY CARE TEAM NETWORK **CCD SECTION: ENCOUNTERS DESCRIPTION:** A map presenting the patient's visits with multiple physicians in context of time and speciality for a condition. I'd like to have a conversation I'd like to keep my entire care team updated on all changes. about this with my doctor. PATIENT'S VOICE: Will my doctor know who I have already seen? How do I communicate to my new doctor who is on my care team? Dr. Andrew Bookman How do I keep track of my visits, linking them **Emergency** Family Physician to specific conditions and/or treatments? Dr. Jessica Liu Task Cardiologist **PATIENT NEEDS:** Represent what I truly care about. Dr. Katie Clark Present information in a way I can Neurologist relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: LETTERHEAD WITH A CLEAR PURPOSE CCD SECTION: PROFILE **DESCRIPTION:** A letter head that clearly communicates the reason for transfer of care. **→** SPECIALIST REFERRAL PATIENT'S VOICE: Dr. Main Physician Dr. Specialist Rx TO: From: Why am I referred to a different doctor? 000 Main Street 000 Across Town Street Suite 000 Suite 000 Who will I be seeing? Where are they located? Downtown, MM, 00000 Suburbs, MM, 00000 How can I contact them? Does this have everything for the new doctor to accept me as new patient? CC: ☐ Dr. Specialist ENT □ Dr. Specialist Allergy ☐ Dr. Another Physician 800-555-5555 800-555-5555 800-555-5555 Who in my care team do I want to keep in the loop? Foot Examination Purpose: **PATIENT NEEDS:** X-Rays Enclosed: Represent what I truly care about. Present information in a way I can Patient Medical History relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. ☐ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY APPOINTMENTS (1/2) **CCD SECTION: ENCOUNTERS DESCRIPTION:** An overview of the patient's past & future visits, including appointment admins, activities and take-aways. DR. JESSICA LIU Jessica Stevenson (272) 282-2921 **SCHEDULED** MAY 30TH, 2011 Pulmonary Dx Test PATIENT'S VOICE: When was my last visit? DR. ANDREW BOOKMAN Rob Singh (272) 282-2987 MARCH 21ST, 2011 When is my next visit? Who do I see for which aspects of my condition? Take-aways 🗓 🛂 Cardiogram L Check Up What has been done? DR. JESSICA LIU **JANUARY 15TH, 2011** Jessica Stevenson (272) 282-2921 CT-Chest Pulmonary Dx Test Take-aways **PATIENT NEEDS:** DR. KATIE CLARK Jipananda Rosh (272) 272-0983 NOVEMBER 26TH, 2010 Represent what I truly care about. Present information in a way I can Take-aways MRI-Brain relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. \square Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY APPOINTMENTS (2/2) **CCD SECTION: ENCOUNTERS DESCRIPTION:** A detailed view of my visit with with one provider, including contact information, activities and take-aways, and if scheduled future visits. Dr. Andrew Bookman March 21st, 2011 Cardiac Care Primary Care PATIENT'S VOICE: Most recent visit - March 21st, 2011 When was my last visit? (*) Map Location When is my next visit? **E** Activity Take-aways Who do I see for which aspects of my condition? What was done? Cardiogram Prescription 5mg benazepril General Checkup Referral Dr. John Lee - Cardiologist Next Scheduled Visit - March 28th, 2011, 9:00AM **PATIENT NEEDS: ☆** (298) 287-2871 **→** andy@goodclinic.com 9:00AM - 5:00PM M-F Represent what I truly care about. Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY CARE INSTRUCTIONS CCD SECTION: ADV. DIRECTIVE **DESCRIPTION:** A tool to help patients keep track of their advance directive. ADVANCE DIRECTIVE PATIENT'S VOICE: WHAT IS AN ADVANCE DIRECTIVE? When do I need to start thinking about setting up an advance directive? MY CURRENT DIRECTIVE Is my past advance directive reflected correctly? **VERIFICATION** MY DIRECTIVE **DESCRIPTION** FIRST VERIFIED BY LAST VERIFIED BY POWER OF ATTORNEY ☐ I wish to update this Dr. Silvia Dualeh June 15, 1998 CA ☐ I WANT TO TALK MORE ABOUT THIS BECAUSE: **PATIENT NEEDS:** Represent what I truly care about. Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY FAMILY HEALTH HISTORY

I'd like to have a conversation FAMILY HEALTH HISTORY TREE about this with my doctor GrandFather GrandFather Passed away at Age 83 ME Cause of Death Diabetes Type I Heart Failure (Age 83) Onset: Age 8 Sister GrandMother Father GrandMother Mother No Reported Living - Age 89 No Data Living Issues Diabetes Type I Onset: Age 4 Stroke Onset: Age 58 Onset: Age 21 **Brother** Male No Data Female

PHYSICIAN NEEDS

☐ Allow me to add additional in	itormation. 🗀 A
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\square Enable me to	quickly	spot	clean	and
validated data	a.			

☐ Enable me to quickly build	strong
rapport with new patients.	

DESCRIPTION:

An overview of family members' conditions in a language patients can understand, including conversation prompts for the next visit.

CCD SECTION: FAMILY HISTORY

PATIENT'S VOICE:

Has my doctor captured my family's health history correctly?

What do I need to understand about my family history?

Do I need to find out more?

What about genetics, behavioral and environmental influences?

PATIENT NEEDS:

☐ Rep	resent what	: I truly	care	about.
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\bowtie	Present information in a way I o	can
	relate to.	

□ H	elp me	cross-	check	my fac	ts.
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Help me close communication loops
amongst my care team.

\boxtimes	Set me up to have clarifying an					
	guiding conversations.					

Clearly	lav	out the	next	stens.
 Otcui ty	tu y	out the	IICAL	Jicps.

_			_			
	Help	me see	my tr	rajectory	over	time.

TITLE: MY MED CHECK (1/2) **CCD SECTION: MEDICATIONS DESCRIPTION:** A tool to instruct patients on how to take multiple medications the right way, to elicit if the medications are listed correctly, and if the patient has any questions. PATIENT'S VOICE: MEDICATION A Do all my current treatments show up MEDICATION B correctly? MEDICATION C MEDICATION X MEDICATION Y Are my meds captured with the right dosages? DO NOT MIX MEDICATION Y WITH MEDICATION B **PATIENT NEEDS:** Call Your Primary Care Provider if: ☐ I'd like to have a Call 911 if conversation about Represent what I truly care about. this with my doctor Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY MED CHECK (2/2) **CCD SECTION: MEDICATIONS DESCRIPTION:** A view of current and past medications, with use status, common naming, and basic dosage information. **CURRENT PREVIOUS** PATIENT'S VOICE: Do all my current treatments show up correctly? Are my meds captured with the right dosages? **ACTIVE AS NEEDED NOT TAKEN** COMPLETE COMPLETE BRAND: GENERIC: GENERIC: **GENERIC:** GENERIC: Levathyroxine BRAND: BRAND: BRAND: BRAND: Synthroid DOSAGE DOSAGE: DOSAGE: DOSAGE: DOSAGE 40mg, 3 per day NICK NAME: **PATIENT NEEDS:** NICK NAME: NICK NAME: NICK NAME: NICK NAME: Thyroid Med Represent what I truly care about. ☐ THIS INFO IS CORRECT ☐ THIS INFO IS CORRECT Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY ALLERGIES SNAPSHOT **CCD SECTION: ALLERGIES DESCRIPTION:** An overview of patient's allergies organized by category, severity and reaction. MEDICAL ALLERGIES ☐ I WANT TO TALK ABOUT THIS PATIENT'S VOICE: LIFE THREATENING NON-LIFE THREATENING What am I allergic to? How allergic am I? Is This Up-to-date? Is This Up-to-date? IODINE PENICILLIN ☐ YES ☐ NO ☐ YES ☐ NO Reaction: Swelling Reaction: Hives When do I need to seek medical help? CODEINE Is This Up-to-date? **PEANUTS** Is This Up-to-date? Reaction: Hallucinate ☐ YES ☐ NO Reaction: Anaphylactic Shock ☐ YES ☐ NO **Allergy Suspicions PATIENT NEEDS:** ☐ I WANT TO TALK ABOUT THIS Substance _____ Substance Represent what I truly care about. Reaction _____ Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY MEDICATION TALK LIST	CCD SECTION: MEDICATIONS
MY CHECK-IN NOTES	DESCRIPTION: A tool for patients to prepare medication related questions for their next appointment, and to capture the conversation with the physician.
☐ I take my meds differently than listed.	PATIENT'S VOICE:
☐ I keep track of my meds and would like to	What do I want to discuss with my doctor regarding my meds?
	I want to show my doctor what I am tracking regarding my meds and get their opinion on
☐ I have side effects.	what I should be tracking.
☐ My goal is to get off my meds.	
MY ADDITIONAL QUESTIONS	PATIENT NEEDS:
	☐ Represent what I truly care about.
	Present information in a way I can relate to.
	Help me close communication loops amongst my care team.
	Set me up to have clarifying and guiding conversations.
PHYSICIAN NEEDS	\square Clearly lay out the next steps.
☐ Allow me to add additional information. ☐ Allow me to communicate privately with ☐ other physicians.	☐ Help me see my trajectory over time.
 □ Enable me to quickly spot clean and validated data. □ Enable me to quickly build strong validated data. 	

TITLE: MY PLAN **CCD SECTION: PLAN DESCRIPTION:** A timeline view of scheduled or planned action items with details to set expectations. Pulmonary Function: Preparation -July 9, 2010 PATIENT'S VOICE: What is it? What will happen next? Why do I need to do this? **30-40** minutes What do I need to prepare? How long will this take? **Blood Work:** What timeframe do I have to get this done? Preparation . July 2010 Aug 2010 (15-30 minutes Referral: **PATIENT NEEDS:** Preparation Represent what I truly care about. Nov 2010 Sep 2010 (*) 10-15 minutes Present information in a way I can relate to. July 0ct Nov Dec Aug Sept Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: MY PAST PRECEDURES **CCD SECTION: PROCEDURES DESCRIPTION:** An integrated view of the patient's history of procedures, stating the physicians involved and the reasons for the procedures on a time line. **PROCEDURES** PATIENT'S VOICE: NOV 21, 2010 **TOTAL HIP REPLACEMENT** DR. JESSICA LI What was my journey towards having the procedure done? Dr. Katie Starks Injection Treatment Who was involved in my procedures from start to Orthopedist 9/10/2010 9/17/2010 | 10/11/2010 Mevant Hosp. finish? Who might I need to keep informed of future issues related to this procedure? Referal Dr. Jessica Li Surgery Dr. Andy Brooks Family Physician 8/3/2010 Surgeon 11/21/2010 Mevant Hosp. Good Clinic **PATIENT NEEDS:** Represent what I truly care about. REASON I'd like to keep my entire care I'd like to have a conversation Present information in a way I can team updated on all changes. about this with my doctor. relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: ABOUT ME CCD SECTION: ----**DESCRIPTION:** A brief summary of patient's values, lifestyle and expectations that physicians can choose to use in their conversations with their patients. MY HEALTH GOALS: **ABOUT ME** PATIENT'S VOICE: How might I share what's important to me? Things like: - my treatment preferences - my knowledge of my condition **NUTRITION** NATURAL MED **CONCERNS EXERCISE** - my habits - my health goals - my health concerns - my values **PATIENT NEEDS:** Represent what I truly care about. Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: IMMUNIZATION TRACKER (1/2) **CCD SECTION: IMMUNIZATIONS DESCRIPTION:** An indicator for past immunizations, their status and when and where next steps need to occur. **IMMUNIZATION HISTORY** PATIENT'S VOICE: Influenza - Effective 12 Months 3 Months Remaining Which immunizations have I received? When did I get them? Where did I get them How long will those be effective until? When Received Now **Expiration** do I need to retake them? Dec 2011 Jan 2011 Aug 2011 WALGREENS - 57 El Camino Real, Palo Alto, CA Influenza Booster **PATIENT NEEDS:** SCHEDULED - JAN 2012 Represent what I truly care about. (298) 287-2871 Dr. Andrew Bookman abookman@uhospice.edu Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE: IMMUNIZATION TRACKER (2/2) **CCD SECTION: IMMUNIZATIONS DESCRIPTION:** A progress bar that indicates past immunizations, their status and when next steps are due. **IMMUNIZATION PROCESS** PATIENT'S VOICE: Multi-step Vaccination - Started Aug 3rd, 2011 What are the steps I need to take for multi-step vaccinations? COMPLETE COMPLETE **SCHEDULED** NOT SCHEDULED When did I get them? Where did I get them What is my next step? What is the latest date I Dr. Amelia Collins Dr. Andrew Bookman **COMPLETE BY** cane get it? July 2011 Oct 2011 Stage 3 - Scheduled **PATIENT NEEDS:** SCHEDULED - JAN 2012 Represent what I truly care about. (298) 287-2871 Dr. Andrew Bookman abookman@uhospice.edu Present information in a way I can relate to. Help me cross-check my facts. Help me close communication loops amongst my care team. Set me up to have clarifying and guiding conversations. PHYSICIAN NEEDS Clearly lay out the next steps. ☐ Allow me to add additional information. ☐ Allow me to communicate privately with Help me see my trajectory over time. other physicians. $\hfill\square$ Enable me to quickly spot clean and ☐ Enable me to quickly build strong validated data. rapport with new patients.

TITLE:		CCD SECTION:
		DESCRIPTION:
		PATIENT'S VOICE:
		PATIENT NEEDS:
		☐ Represent what I truly care about.
		Present information in a way I can relate to.
		\square Help me cross-check my facts.
		 Help me close communication loops amongst my care team.
		Set me up to have clarifying and guiding conversations.
PHYSICIAN NEEDS		\square Clearly lay out the next steps.
\square Allow me to add additional information.	Allow me to communicate privately with other physicians.	☐ Help me see my trajectory over time.
Enable me to quickly spot clean and validated data.	Enable me to quickly build strong rapport with new patients.	