

Tools and Resource Guide for Automatic Referral System Implementation

Automatic Referral System Key Resources:

1. Emory Healthcare. "Cardiac Rehabilitation: Electronic Referral Process Communication Tool." Available at: <https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/4.11.2018%20Files/R-14-34-CRCP-Emory%20Healthcare-CR%20Electronic%20Ref%20Process%20%20Comm%20Tool.pdf>

This slide deck, presented by Emory Saint Joseph's Hospital in Atlanta, provides screenshots of the health system's standardized electronic process to support CR referral.

2. Traynor, Kate. "Case Study: Self-Referral of Patient to a Cardiac Rehabilitation Program, Massachusetts General Hospital." *American Association of Cardiovascular and Pulmonary Rehabilitation*. Available at: <https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/4.18.2018%20Files/R-10-CRCP-Case%20Study-MGH-Patient%20Self%20Referral.pdf?timestamp=1524151616416>

This interview with Massachusetts General Hospital includes examples of fax cover sheets and other forms to facilitate patient self-referrals to CR.

3. Traynor, Kate. "Case Study: Referral of Patient to External Cardiac Rehabilitation Program, Massachusetts General Hospital." *American Association of Cardiovascular and Pulmonary Rehabilitation*. Available at: <https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/4.25.2018%20Files/R-5-CRCP-Case%20Study-MGH-External%20CR%20Referral.pdf?timestamp=1524684401393>

This interview with Massachusetts General Hospital discusses their implementation of a more efficient process to facilitate referrals to external CR programs. The case study includes examples of fax cover sheets and other forms used to facilitate these referrals.

4. Jolly, Elizabeth. "A Systemic Approach to Increasing Cardiac Rehabilitation Referrals, Penn Medicine." *American Association of Cardiovascular and Pulmonary Rehabilitation*. Available at: <https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/4.18.2018%20Files/R-36-CRCP-Case%20Study-Penn-Systematic%20Approach%20to%20Increasing%20CR%20Referrals....pdf>

This interview with a nurse from Penn Medicine summarizes the hospital's transition to an "opt-out" CR referral process. This case study provides screenshots of "nudge" alerts and dashboards that track eligible patients.

5. "Cardiac Intermediate Care Unit CR Referral Process." *University of Pennsylvania School of Medicine*. Available at: <https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/6.8.2018%20Files/R-12.5-CRCP-Penn%20Med-CICU%20CR%20Referral%20Process%20Map.pdf>

This diagram outlines the CR referral process for Penn Medicine's cardiac intermediate care unit.

6. "Cardiopulmonary Rehabilitation Referral Process Map." *Lake Regional Health System*. Available at: <https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/4.11.2018%20Files/R-12-CRCP-LRHS-Referral%20Process%20Map.pdf>

This diagram outlines the CR referral process for Lake Regional Health System.

7. "Bridging the Rehabilitation Care Continuum: Spotlight on NYU Langone Health." *American Association of Cardiovascular and Pulmonary Rehabilitation*. Available at:
<https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/R-38-CRCP-Turnkey-Bridging%20the%20Rehab%20Continuum.pdf?timestamp=1525103139064>
This case study summarizes efforts by NYU Langone Health to establish a system-wide integration of a care continuum infrastructure to increase the transitions of cardiac patients to cardiac rehabilitation.
8. "EHR Automatic Referral to CR." *Massachusetts General Hospital*. Available at:
https://www.aacvpr.org/Portals/0/Million%20Hearts%20Change%20Package/4.18.2018%20Files/R-20_1_2-CRCP-MGH-Automatic%20Referral%20to%20CR-EMR%20Screenshots.pdf
These screenshots highlight features in Massachusetts General Hospital's automatic order set for CR referral.
9. Journal of the American medical Informatics Association. "Testing electronic health records in the 'production' environment: an essential step in the journey to a safe and effective health care system." Available at: <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5201179/>
This article proposes how to safely incorporate testing in production into current EHR testing practices, with suggestions regarding the incremental release of upgrades, test patients, tester accounts, downstream personnel, and reporting.
10. Million Hearts. "Cardiac Rehabilitation Communications Toolkit." Available at:
<https://millionhearts.hhs.gov/partners-progress/partners/cardiac-rehab-toolkit.html>
This communications toolkit will equip your health system or practice with resources and messages to spread awareness about the value of cardiac rehabilitation and solutions for increasing participation.
11. HSAG HQIC. "One-Minute Elevator Speech Template." Available at:
<https://www.hsag.com/globalassets/hqic/hqic1minelevatorspeechtemplate.pdf>
A template for developing an elevator speech which is a short, concise, and persuasive synopsis of your proposed project.
12. The HCI Group. "EHR Go-Live: The Definitive Go-Live EHR Implementation Guide." Available at:
<https://info.thehcggroup.com/ebook-ehr-go-live-the-definitive-guide>
A white paper that details out step by step how to prepare for an EHR implementation, many of which are applicable to AR order set implementation.
13. Qualis Health. "EHR Implementation with Minimal Practice Disruption in Primary Care Settings: The Experience of the Washington & Idaho Regional Extension Center." Available at:
<https://www.healthit.gov/sites/default/files/ehr-implementation-wirec.pdf>
A white paper that describes the implementation errors that result in financial loss, practice disruption and patient safety issues and how they pertain to leadership, workflow, provider engagement, training, data interfaces and the user interface.
14. Online Journal of Nursing Informatics Contributors. "Your Data Looks Good on a Dashboard." Available at: <https://www.himss.org/resources/your-data-looks-good-dashboard>
This article is an overview of dashboards and a how-to on constructing simple dashboards.

15. Netherlands Heart Journal. "Patients who do not complete cardiac rehabilitation have an increased risk of cardiovascular events during long-term follow-up." Available at:
<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7431499/>

This article details that Cardiac rehabilitation (CR) has favorable effects on cardiovascular mortality and morbidity. Therefore, it might be reasonable to expect that incomplete CR participation will result in suboptimal patient outcomes.

16. Health Data Storytelling. "From Numbers to Narrative." Available at:
<https://healthdatastorytelling.com/numbers-to-narrative-guide/>

A practical guide to bringing health data to life through storytelling.

17. CR programs in the United States [How to Find Cardiac Rehabilitation Programs](#).

CRCP includes a searchable atlas to identify CR programs in the United States that were reported to the American Hospital Association