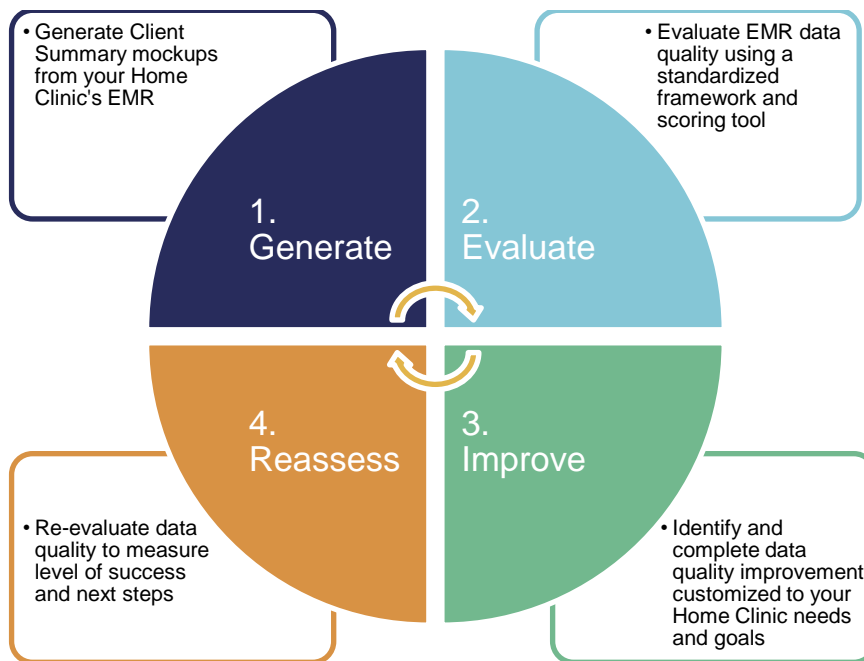# Home Clinic Toolkit Worksheet: Home Clinic Client Summary Mockups

Preparing and analyzing Home Clinic Client Summary mockups is a continuous quality improvement (CQI) activity your Home Clinic can complete to evaluate your EMR data quality and identify data quality strengths and challenges. This activity can help you better understand how the information contained in the Home Clinic Client Summary is captured in your EMR and how that might impact the quality of Client Summaries generated by your Home Clinic.

Results of this process can help frame a customized data quality improvement activity using other components of the Home Clinic Toolkit including SMART goal setting and the Plan-Do-Study-Act cycle from the Model for Improvement. The mockup process is comprised of four main steps:

- Generate Client Summary mockups from your Home Clinic's EMR

1. Generate

- Evaluate EMR data quality using a standardized framework and scoring tool

2. Evaluate

- Re-evaluate data quality to measure level of success and next steps

4. Reassess

- Identify and complete data quality improvement customized to your Home Clinic needs and goals

3. Improve

When generating the mockups, Home Clinics should make every attempt to include the maximum number of data elements included in the actual Client Summary document as displayed below.

To learn more about the Home Clinic Client Summary review this Info sheet, 5-minute video or FAQs. Contact your Home Clinic Liaison for more information on how to generate Client Summary mockups in your EMR.

Demographics	Health Conditions and Diagnoses	Surgeries, Procedures and Interventions	Susepcted Allergies and Intolerances	Prescribed Medications	Vital Signs Recorded
• Name* • Gender • Age	• Onset Date • Status • Condition Name	• Date • Description	• Allergen • Severity • Reaction Type • Reaction Description	• Date • Name • Strength • Dosage • Route • Frequency • Duration	• Date • Blood Pressure • Heart Rate • Height • Weight • Waist Circumference • Body Mass Index

*If optional peer review is taking place, Home Clinics may decide to remove the Name field to maintain patient privacy

The following table outlines the steps your clinic can follow to complete this activity:

Step	Activity	Time commitment
Phase 1		
1. Home Clinic selects patients to include plus prepares and generates EMR mockups *Home Clinic Liaison can provide support as required*	• Select ten (10) enrolled patients per participating provider • Align patient selection with any existing data quality goals or improvement planning • Prepare mockups in the EMR • Generate mockups from the EMR	Selecting patients: 30min Preparing mockups: 1 hour *Time may vary based on EMR used* Generating mockups: 15min - 1 hour *Dependent on number of participating providers*
2. Data quality evaluation of mockups: A. Each participating provider self-evaluates their mockups *B. Optional peer evaluation from a provider within same Home Clinic*	• Evaluate each mockup using three characteristics of the EMR Data Quality Evaluation Guide as directed • Record scores and contextual comments within the Microsoft Excel scoring tool	Provider: 1-2 hours *Peer reviewers: 1-2 hours (optional)*
Data quality improvement		
3. Review of evaluation results and identification of an EMR data quality improvement goal and associated activities	• Review the Results tab in the scoring tool for visual representation of the findings • *If using the optional peer review, compare findings between providers and discuss* • Develop a SMART goal for EMR data quality improvement targeted at the Client Summary	2-6 weeks *Supported by resources within the Home Clinic Toolkit and your assigned Home Clinic Liaison* *At minimum, improvement should be reflected in the ten patient records selected for mockup generation to enable comparison.* *After achieving success with your improvement, it can be disseminated more broadly.*
4. Implementation of data quality improvement activity	• Plan and implement a PDSA cycle to support your goal • Should enable achievement of SMART goal	
Phase 2		
5. Repeat generation of ten (10) mockups per participating provider	• Completed on same cohort of patients as Phase 1 to enable comparison	Generating mockups: 15min - 1 hour *Dependent on number of participating providers*

6. Repeat data quality evaluation of mockups:	• Evaluate each mockup using three characteristics of the EMR Data Quality Evaluation Guide as directed • Record scores and contextual comments within the Microsoft Excel scoring tool	Provider: 1-2 hours *Peer reviewers: 1-2 hours (optional)*
7. Review of evaluation results with comparison between Phase 1 and Phase 2 to determine success of activity and next steps	• Review the Results tab in the scoring tool for visual representation of the findings • *If using the optional peer review, compare findings between providers and discuss*	As per Home Clinic *Next steps could include modifications to and repeat of PDSA cycle or dissemination of improvement principles across the practice.*