

Appendix G. EPIC Code Book

<ul style="list-style-type: none"> • Category and Code/Value 	<ul style="list-style-type: none"> • Definition
<ul style="list-style-type: none"> • Type of visit: 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Attempted intake 	<ul style="list-style-type: none"> • Unsuccessful attempt to reach a patient by phone for an intake visit
<ul style="list-style-type: none"> • Attempted intake – warm handoff intro 	<ul style="list-style-type: none"> • Warm handoff in person that does not result in full intake
<ul style="list-style-type: none"> • Attempted follow-up 	<ul style="list-style-type: none"> • Unsuccessful attempt to contact a patient in person or by phone for a follow-up visit
<ul style="list-style-type: none"> • Office - intake 	<ul style="list-style-type: none"> • Completed in-person intake that is not the result of a warm handoff
<ul style="list-style-type: none"> • Office – intake – warm handoff 	<ul style="list-style-type: none"> • Completed in-person intake that results from a warm handoff
<ul style="list-style-type: none"> • Office – follow-up 	<ul style="list-style-type: none"> • Completed in-person follow-up visit
<ul style="list-style-type: none"> • Phone – intake 	<ul style="list-style-type: none"> • Completed phone intake visit
<ul style="list-style-type: none"> • Phone – follow up 	<ul style="list-style-type: none"> • Completed phone follow-up visit
<ul style="list-style-type: none"> • Letter 	<ul style="list-style-type: none"> • Letter to a patient that contains information related to health coaching or referral that does not duplicate documentation in another record
<ul style="list-style-type: none"> • Invitation Letter 	<ul style="list-style-type: none"> • Letter to a patient or patient’s parents inviting them to work with the CRS
<ul style="list-style-type: none"> • Visit fragment 	<ul style="list-style-type: none"> • A part of a visit, e.g., an after-visit summary, that contains codeable information but doesn’t fit in any of the other categories above
<ul style="list-style-type: none"> • Specific project categories: 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Kids Link – No 	<ul style="list-style-type: none"> • This patient is not part of the Kids Link program
<ul style="list-style-type: none"> • Kids Link – Yes 	<ul style="list-style-type: none"> • Indication that a child aged 6–17 and his/her parents/family worked with CRS as part of the Kids Link program
<ul style="list-style-type: none"> • Chronic Disease - No 	<ul style="list-style-type: none"> • Visit was not related to a chronic disease
<ul style="list-style-type: none"> • Chronic Disease – Yes 	<ul style="list-style-type: none"> • Any work with CRS related to management of a chronic disease; if a goal is set for a self-management practice, double-code with this code

<ul style="list-style-type: none"> • Category and Code/Value 	<ul style="list-style-type: none"> • Definition
<ul style="list-style-type: none"> • Weight Management – No 	<ul style="list-style-type: none"> • Visit was not related to weight management
<ul style="list-style-type: none"> • Weight Management – Yes 	<ul style="list-style-type: none"> • Any work with CRS related to managing weight
<ul style="list-style-type: none"> • Neighborhood Health Link - Used 	<ul style="list-style-type: none"> • Documentation of referral to NHL resource
<ul style="list-style-type: none"> • Neighborhood Health Link – Used/URL 	<ul style="list-style-type: none"> • Documentation of link to NHL resource
<ul style="list-style-type: none"> • Neighborhood Health Link - No 	<ul style="list-style-type: none"> • No documentation of referral or link to NHL
<ul style="list-style-type: none"> • Goals and progress: Values (columns) 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Goal 	<ul style="list-style-type: none"> • Documentation of clearly stated goal in category
<ul style="list-style-type: none"> • Progress – Made progress 	<ul style="list-style-type: none"> • Any statement of progress toward goal/action plan in category in a follow-up visit
<ul style="list-style-type: none"> • Progress – Met action step 	<ul style="list-style-type: none"> • Completed action step in category that was set in a previous visit
<ul style="list-style-type: none"> • Progress – Verbalize no progress 	<ul style="list-style-type: none"> • Statement that no progress was made toward goal/action plan in category
<ul style="list-style-type: none"> • Progress – N/A 	<ul style="list-style-type: none"> • No goal or action plan set previously
<ul style="list-style-type: none"> • Made goal 	<ul style="list-style-type: none"> • Documentation that set goal in category during current encounter (see above)
<ul style="list-style-type: none"> • Action plan 	<ul style="list-style-type: none"> • Documentation of clearly stated action plan in category
<ul style="list-style-type: none"> • Goals and progress: Categories (rows) 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Documentation of goal and/or action plan related to:
<ul style="list-style-type: none"> • Goal – Addiction support 	<ul style="list-style-type: none"> • Reducing or stopping use of addictive substances (tobacco, alcohol, other drugs)

<ul style="list-style-type: none"> • Goal - Chronic disease • self management 	<ul style="list-style-type: none"> • Chronic disease self-management, e.g., taking medication regularly, • testing blood sugar, monitoring blood pressure, joining Group Health
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<ul style="list-style-type: none"> • Categ ory and Code/Value 	<ul style="list-style-type: none"> • Definition
<ul style="list-style-type: none"> • practice 	<ul style="list-style-type: none"> • Living Well workshop, diabetic eye exams, etc.
<ul style="list-style-type: none"> • Goal – Accessing appropriate health services (non-chronic disease) 	<ul style="list-style-type: none"> • Accessing appropriate health services that are not related to managing a chronic disease, e.g., getting a recommended screening test or vaccination, routine preventive exam, etc.
<ul style="list-style-type: none"> • Goal - Healthy eating 	<ul style="list-style-type: none"> • Eating healthily, changing eating patterns; includes individual family and group efforts/activities
<ul style="list-style-type: none"> • Goal – Parenting support 	<ul style="list-style-type: none"> • Support for parenting children of any age, including post-partum/infant support
<ul style="list-style-type: none"> • Goal – Physical activity 	<ul style="list-style-type: none"> • Physical activity, exercise, increasing movement, adaptations for physical/mental limitations; includes individual family and group efforts/activities
<ul style="list-style-type: none"> • Goal – Personal enrichment 	<ul style="list-style-type: none"> • What patient enjoys or wants more of in life; includes spiritual activities/resources not covered in other categories
<ul style="list-style-type: none"> • Goal – Psychosocial issues 	<ul style="list-style-type: none"> • Social isolation, depression, grief, stress, family issues, relationships with peers/coworkers, etc.
<ul style="list-style-type: none"> • Goal – Accessing social services 	<ul style="list-style-type: none"> • Accessing social services resource, including employment & training, respite care, housing, financial, WIC, food bank, senior services/Information
<ul style="list-style-type: none"> • Goal – can't tell 	<ul style="list-style-type: none"> • Can't tell which category from the notes; use sparingly, only if it's completely unclear
<ul style="list-style-type: none"> • Goal – no goal set 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Referrals: Values (columns) 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Referred 	<ul style="list-style-type: none"> • Documentation of resource referral in category
<ul style="list-style-type: none"> • Follow-up 	<ul style="list-style-type: none"> • Documentation of discussion of/follow-up on previous referral in category

<ul style="list-style-type: none"> • Used 	<ul style="list-style-type: none"> • Any statement that patient used previously referred resource
<ul style="list-style-type: none"> • Resource not used/refused 	<ul style="list-style-type: none"> • Statement that patient did not use or refused resource

<ul style="list-style-type: none"> • Category and Code/Value 	<ul style="list-style-type: none"> • Definition
<ul style="list-style-type: none"> • Referrals: Categories (rows) 	
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Referral to:
<ul style="list-style-type: none"> • Ref – Addiction support 	<ul style="list-style-type: none"> • Program for reducing or stopping use of addictive substances (tobacco, alcohol, other drugs)
<ul style="list-style-type: none"> • Ref - Chronic disease management program 	<ul style="list-style-type: none"> • Chronic disease management program other than Living Well that is facilitated and that focuses on information, skills-building, and/or goal- setting
<ul style="list-style-type: none"> • Ref – Comprehensive weight management program 	<ul style="list-style-type: none"> • A comprehensive program like Weight Watchers or the YMCA Lose to Win program that addresses both healthy eating and physical activity as well as other topics related to weight management
<ul style="list-style-type: none"> • Ref - Health care provider – non-GH 	<ul style="list-style-type: none"> • Any non-Group Health provider or health care service, including complementary and alternative medicine, foot care, screenings, dental care, etc.
<ul style="list-style-type: none"> • Ref - Healthy eating: Group support 	<ul style="list-style-type: none"> • Group support for healthy eating, e.g., Weight Watchers, diabetic cooking class, PCC (local natural market) low-fat cooking class, Overeaters Anonymous, etc.
<ul style="list-style-type: none"> • Ref – Parenting support 	<ul style="list-style-type: none"> • Any parenting support resource, including post-partum/infant support
<ul style="list-style-type: none"> • Ref - Physical activity: Individual/Family 	<ul style="list-style-type: none"> • Self-initiated individual and/or family physical activity, not part of an organized group, that involves a referral, e.g., walking trails, NHL
<ul style="list-style-type: none"> • Ref - Physical activity: Organized 	<ul style="list-style-type: none"> • Organized sports, recreational activities, or any physical activity that is done in an organized group, e.g., soccer team, Mountaineers hikes, group bike trips, mall walking, etc. Does not include group fitness center activities
<ul style="list-style-type: none"> • Ref – Physical activity: Fitness Center 	<ul style="list-style-type: none"> • Physical activity done in a place that has exercise equipment, classes, training, etc. (may not be called a fitness center, e.g. the YMCA)

<ul style="list-style-type: none"> • Ref – Other recreation activities 	<ul style="list-style-type: none"> • Any recreational activity not focused on physical activity, including card playing, etc. Can be individual or group
<ul style="list-style-type: none"> • Ref - Social services 	<ul style="list-style-type: none"> • Any social services resource, including employment & training, respite care, housing, financial, WIC, food bank, senior services/information
<ul style="list-style-type: none"> • Ref - Support groups 	<ul style="list-style-type: none"> • Any support group, including grief support, multiple sclerosis or other • chronic disease support, etc. Assumes group of peers primarily for

<ul style="list-style-type: none"> • Categ ory and Code/Value 	<ul style="list-style-type: none"> • Definition
<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • sharing common experiences; not primarily focused on education or skills-building; may be led by professional or not
<ul style="list-style-type: none"> • Info – Written material or website (non-GH) 	<ul style="list-style-type: none"> • Any non-GH written material or web-based information that will assist the patient in reaching a goal; may be health-related, social service, etc.
<ul style="list-style-type: none"> • Info – GH: Written material or website 	<ul style="list-style-type: none"> • Any GH written material or web-based information (www.ghc.org) that will assist the patient in reaching a goal; may be health-related, social service, etc. Includes referrals to GH Customer Service.
<ul style="list-style-type: none"> • Ref – GH: Living well 	<ul style="list-style-type: none"> • Living Well with Chronic Conditions groups
<ul style="list-style-type: none"> • Ref – GH: SW 	<ul style="list-style-type: none"> • Group Health Social Services
<ul style="list-style-type: none"> • Ref – GH: BH 	<ul style="list-style-type: none"> • Group Health Behavioral Health
<ul style="list-style-type: none"> • Ref – GH: Primary care team 	<ul style="list-style-type: none"> • Group Health primary care team
<ul style="list-style-type: none"> • Ref – GH: non-primary care provider GH provider 	<ul style="list-style-type: none"> • Any GH provider including dietician, etc. Does not include social worker/behavioral health
<ul style="list-style-type: none"> • Ref – GH: Walk and Talk 	<ul style="list-style-type: none"> • GH Walk and Talk program
<ul style="list-style-type: none"> • Facility - Senior center 	<ul style="list-style-type: none"> • Senior Center; must double-code specific service referred to if applicable
<ul style="list-style-type: none"> • Facility - Community center (must double code) 	<ul style="list-style-type: none"> • Community Center; must double-code specific service referred to if applicable
<ul style="list-style-type: none"> • Facility – YMCA (must double 	<ul style="list-style-type: none"> • YMCA; must double-code specific service referred to if applicable

code)	
<ul style="list-style-type: none"> • Facility – School/summer camp (must double-code) 	<ul style="list-style-type: none"> • School or summer camp; must double-code specific service referred to if applicable
<ul style="list-style-type: none"> • No referral made 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Challenge 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Hard to find what’s available 	<ul style="list-style-type: none"> •

<ul style="list-style-type: none"> • Categ ory and Code/Value 	<ul style="list-style-type: none"> • Definition
<ul style="list-style-type: none"> • Transportation 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Cost 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Not in my community 	<ul style="list-style-type: none"> • Resource not available in patient’s community
<ul style="list-style-type: none"> • Don’t have time 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Physical/mental health limitations 	<ul style="list-style-type: none"> • Disabilities or other limitations
<ul style="list-style-type: none"> • Motiv ational ambivalence 	<ul style="list-style-type: none"> • Patient seems ambivalent about motivation to complete action steps or achieve goal
<ul style="list-style-type: none"> • Kids Link parent issue 	<ul style="list-style-type: none"> • In Kids Link, an issue related to the parent is a barrier to completing action steps or achieving goals. Double-code with other challenge codes if appropriate.
<ul style="list-style-type: none"> • Kids Link child issue 	<ul style="list-style-type: none"> • In Kids Link, an issue related to the child/teen is a barrier to completing action steps or achieving goals. Double-code with other challenge codes if appropriate.
<ul style="list-style-type: none"> • Other 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • No challenges noted 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Completion of work with CRS 	<ul style="list-style-type: none"> •

<ul style="list-style-type: none"> • Verbalized finished 	<ul style="list-style-type: none"> • Documentation that the patient and/or the CRS verbalized the end of contact
<ul style="list-style-type: none"> • Finished not satisfied 	<ul style="list-style-type: none"> • Documentation that the patient and/or the CRS verbalized the end of contact; patient states not satisfied with CRS services
<ul style="list-style-type: none"> • Never connect 	<ul style="list-style-type: none"> • Letter sent to a patient as the last attempt to contact; CRS had no direct contact with patient
<ul style="list-style-type: none"> • Lost connection 	<ul style="list-style-type: none"> • Letter sent to a patient as the last attempt to contact; CRS worked with patient at least once, then lost contact
<ul style="list-style-type: none"> • N/A 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Finished – not interested 	<ul style="list-style-type: none"> • Documentation that the CRS contacted the patient, who was not interested in or refused CRS services

<ul style="list-style-type: none"> • Category and Code/Value 	<ul style="list-style-type: none"> • Definition
<ul style="list-style-type: none"> • Other 	<ul style="list-style-type: none"> •
<ul style="list-style-type: none"> • Review complete?* 	<ul style="list-style-type: none"> • All coding on this record complete? Click if “yes”
<ul style="list-style-type: none"> • Issue 	<ul style="list-style-type: none"> • Any coding issue that the team needs to discuss

NHL, Neighborhood Health Link: Website with community resources for healthy living in King and Pierce counties, where the CRS interventions occurred; WIC, Special Supplemental Nutrition Program for Women, Infants, and Children; GH, Group Health