

# Grouping Rules and Actions

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Version 14.19

## About

This article explains how Grouping Rules and Actions can be used in Care Plan Triggers. The table uses the example columns (Grouping Rules, Item Name, Condition, and Values) to allow you to begin thinking how the rules have an impact for qualifying patients.

- Each Begin Group has its own evaluation, but they will be evaluated as a complete statement to qualify a patient for the Care Plan.
- From example columns below:
  - In the first Begin Group, the trigger is searching for children between the ages of 5 to 10 with one of the SNOMEDs entered in the problem list or a medication prescribed from the NCD list.
  - In the second AND Begin Group the trigger is searching for children over the age of 15 with one of the SNOMEDs entered in the problem list.
  - In the third OR Begin Group the trigger is searching for children over the age of 15 with a BMI or BMI% at a specific value.

Grouping Rule	Definition	Example			
		Grouping Rules	Item Name	Condition	Value(s)
Begin Group	Must always start the Triggers evaluation with the Begin Group Statement.	Begin Group	Age in years	is greater than or equal	5
AND	Include the trigger to qualify a patient. Using the AND grouping rule would require all AND statements to be met for the patient to qualify for the Care Plan.	AND AND	Age in years Active problem SNOMED	is less than or equal is in list	10 '70156005','41040004', '205615000','205616004', '254264002','371045000'
OR	This rule allows you to evaluate multiple values and will qualify a patient if any OR statement is met.	OR	Takes medication by NDC	is in list	'31722021230','68180035202'
AND Begin Group	Using this grouping rule begins a new set of trigger conditions to include to qualify a patient.	AND Begin Group	Age in years	is greater than or equal	15
		AND	Active problem SNOMED	is in list	'70156005','41040004', '205615000','205616004', '254264002','371045000'
OR Begin Group	Using this grouping rule begins a new set of trigger conditions where either	OR Begin Group	Age in years	is greater than or equal	15

Grouping Rule	Definition			Example	
	group may be true to qualify a patient	OR	Most recent BMI	is greater than or equal	30
		OR	Most recent BMI%	is greater than or equal	90

**Example:** How do I setup the Triggers if I want to see boys between the ages of 9-13 or girls ages 11-14 who have ADHD and are active patients:

1. BEGIN Group, Sex, is equal to, 'M'
2. AND, Age in years, between, '9' AND '13'
3. OR Begin Group, Sex, is equal to 'F'
4. AND, Age in years, between, '11' AND '14'
5. AND Begin Group, Active problem SNOMED, is in list, (Enter all the SNOMED codes for ADHD)
6. AND, Patient Status, is equal to, 'ACTIVE'

**Example:** How do I setup the Triggers if I want to see all active patients ages 2-18 with BMI <5% or >95% and has insurance for Blue Cross/Blue Shield:

1. BEGIN Group, Patient status, is equal to, 'ACTIVE'
2. AND, Age in years, between, '2' AND '18'
3. AND, Primary payer, is equal to, '(enter in your code for the health plan)'
4. AND Begin Group, Most recent BMI, is less than or equal, 5
5. OR, Most recent BMI%, is greater than or equal, 95

Version 14.10

## Overview

This article explains how Grouping Rules and Actions can be used in Care Plan triggers. The table uses the example columns (Grouping Rules, Item Name, Condition, and Values) to allow you to begin thinking how the rules have an impact for qualifying patients.

- Each **Begin Group** has its own evaluation, but they will be evaluated as a complete statement to qualify a patient for the Care Plan.
- From example columns below:
  - In the first **Begin Group**, the trigger is searching for children between the ages of 5 to 10 with one of the SNOMEDs entered in the problem list or a medication prescribed from the NCD list.
  - In the second **AND Begin Group** the trigger is searching for children over the age of 15 with one of the SNOMEDs entered in the problem list.
  - In the third **OR Begin Group** the trigger is searching for children over the age of 15 with a BMI or BMI% at a specific value.

Grouping Rule	Definition	Example			
		Grouping Rules	Item Name	Condition	Value(s)
	Must always start the	Begin	Age in years	is greater than	5

Grouping Rule	Definition	Group		or equal Example	
AND	Include the trigger to qualify a patient. Using the AND grouping rule would require all AND statements to be met for the patient to qualify for the Care Plan.	AND AND	Age in years Active problem SNOMED	is less than or equal is in list	10 '70156005','41040004', '205615000','205616004', '254264002','371045000'
OR	This rule allows you to evaluate multiple values and will qualify a patient if any OR statement is met.	OR	Takes medication by NDC	is in list	'31722021230','68180035202'
AND Begin Group	Using this grouping rule begins a new set of trigger conditions to include to qualify a patient.	AND Begin Group	Age in years	is greater than or equal	15
		AND	Active problem SNOMED	is in list	'70156005','41040004', '205615000','205616004', '254264002','371045000'
OR Begin Group	Using this grouping rule begins a new set of trigger conditions where either group may be true to qualify a patient	OR Begin Group	Age in years	is greater than or equal	15
		OR OR	Most recent BMI Most recent BMI%	is greater than or equal is greater than or equal	30 90

**Example:** How do I setup the triggers if I want to see boys between the ages of 9-13 or girls ages 11-14 who have ADHD and are active patients:



1. BEGIN Group, Sex, is equal to, 'M'
2. AND, Age in years, between, '9' AND '13'
3. OR Begin Group, Sex, is equal to 'F'
4. AND, Age in years, between, '11' AND '14'
5. AND Begin Group, Active problem SNOMED, is in list, (Enter all the SNOMED codes for ADHD)
6. AND, Patient Status, is equal to, 'ACTIVE'

**Example:** How do I setup the triggers if I want to see all active patients ages 2-18 with BMI <5% or >95% and has insurance for Blue Cross/Blue Shield:



1. BEGIN Group, Patient status, is equal to, 'ACTIVE'
2. AND, Age in years, between, '2' AND '18'
3. AND, Primary payer, is equal to, '(enter in your code for the health plan)'
4. AND Begin Group, Most recent BMI, is less than or equal, 5
5. OR, Most recent BMI%, is greater than or equal, 95

