

Reporting Free-Text Comments from BPA for Thematic Analysis

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BPA-TECH Project


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Objective

- Recode the **subjective free-text comments** from the **Patient declined/not ready** and **Patient Not Appropriate** acknowledgment reasons from the BPA (6-month data) into defined categories

Type 1 Diabetes (T1D): Automated Insulin Delivery System NOT prescribed

This patient with type 1 diabetes is **NOT** prescribed an Automated Insulin Delivery system, which is the preferred insulin delivery method according to practice guidelines.



If patient is already on AID system, do at least one of the following:

- Add device to med list either manually or using Order Set below (preferred)
- Select device on diabetes intake form.
- Click "Add Problem" below

Perform the following actions

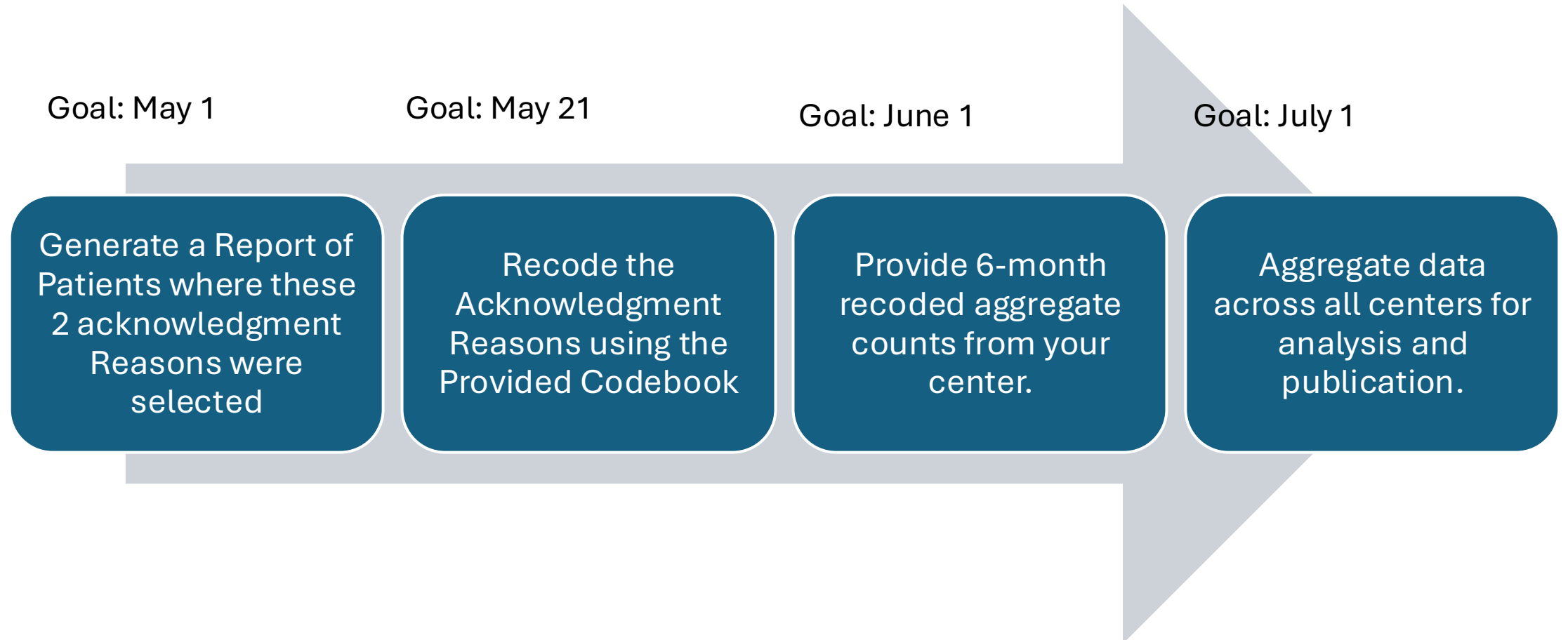
- Open Order Set: **Automated Insulin Delivery (AID) Systems** [Edit](#)
- Add Problem: Presence of hybrid closed-loop insulin pump system (Share with patient) [Edit Details](#)
- Add: Insulin Pump Initiation and Training (Create episode: Diabetes Insulin Pump Initiation)

Acknowledge and continue

- Not T1D, will update problem list
- Patient declined/not ready**
- Patient not appropriate
- Cost/insurance
- Patient ready, deciding on pump
- Pump ordered, not yet started
- Already on AID, will update med list
- SNOOZE for me - Will review

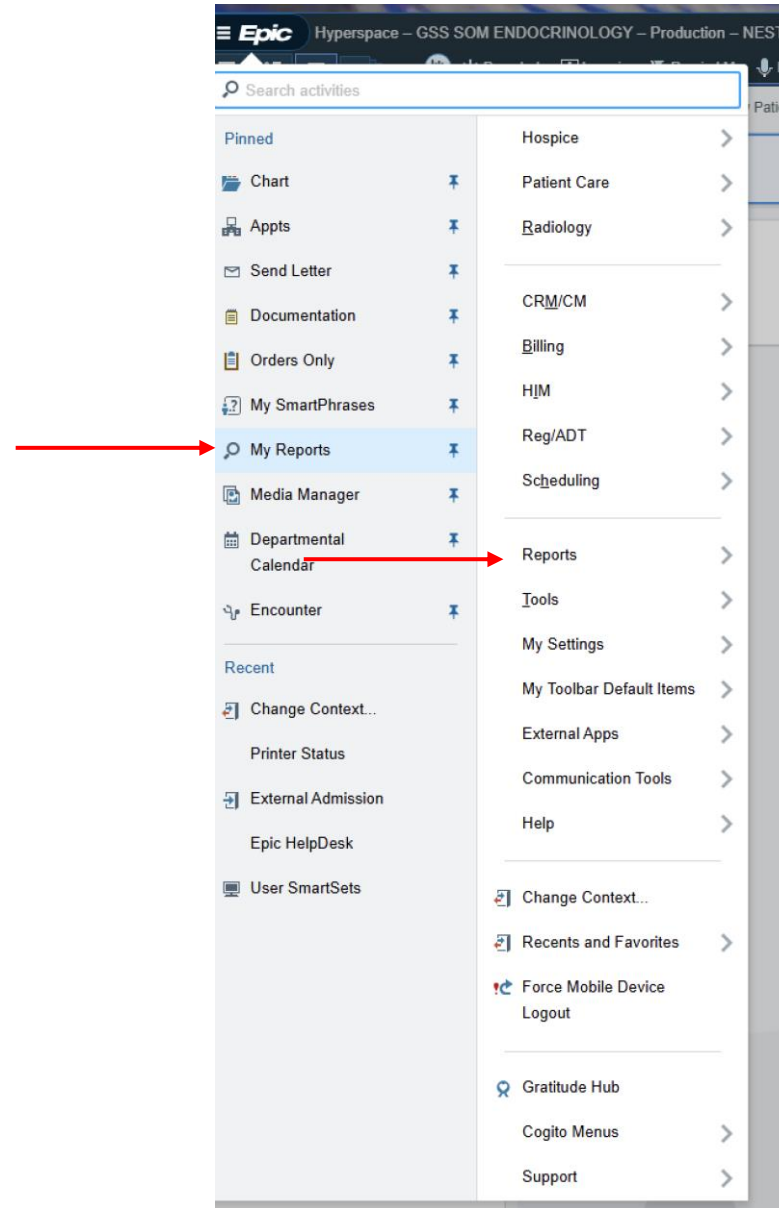
Defer to Storyboard to address later

Big Picture Process



Generating Patient Report from the OPA Utilization

Step 1: Select “My Reports” Under Epic pull-down



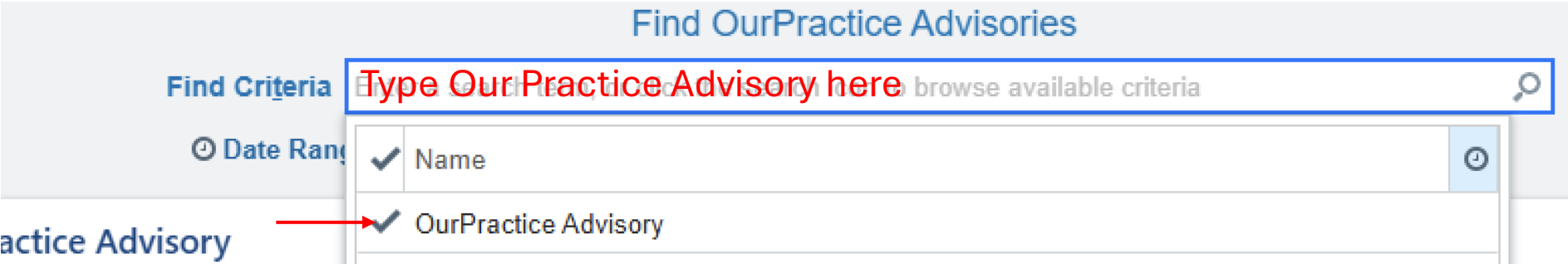
Step 2: Search for “Best Practice Alert Usage.” Click the Star Symbol to the Right.

The screenshot shows a web application interface with a search bar at the top containing the text "Best Practice". Below the search bar, there is a sidebar on the left with a "Content Type" section containing checkboxes for "Dashboards", "SlicerDicer", and "Components". The main area displays "Search Results" with a list of four items. The fourth item, "Best Practice Alert Usage", is highlighted in blue. A red arrow points to the search bar, another red arrow points to the "SlicerDicer" checkbox, and a third red arrow points to the star icon on the right side of the highlighted search result.

Search Results

- ☆ Best Practice Alert Usage for BPA Active IVIG Treatment Interference
- ☆ Best Practice Alert
Search for patients who have met the criteria for a selected OurPractice Advisory (OPA), whether or not the OPA has actually been triggered. It is recommended that you fill in at least one of the following criteria: Primary Care Provider (PCP) field or Health Maintenance (HM) Modifier field. Filling in one or both of these fields c...
- ☆ Best Practice Alert Usage with Hospital Chart (BPA)
- ☆ Best Practice Alert Usage

Step 3: In Find Criteria, select “Our Practice Advisory”



Step 4: Enter name of your OPA in the OurPractice Advisory field

The screenshot shows a software interface with a header 'OurPractice Advisory' and three icons (up arrow, info, trash) on the right. Below the header is a text input field containing 'OurPractice Advisory'. A red arrow labeled '1' points to the input field, which now contains 'T1D|'. A dropdown menu is open below the input field, showing a 'Recent' section and a list item 'AMB T1D NOT ON AID SIMPLE [5576]'. A red arrow labeled '2' points to this list item. A blue label 'Criteria' is positioned to the left of the dropdown menu.

Note: This is center-specific. The name of the OPA shown here is for Johns Hopkins. Yours may be different.

Step 5: Search for “Specific Override Reason” in Criteria

Find Our Practice Advisories

Find Criteria

specific override reason|









🕒 Date Range From: 5/6/2025 8:00 AM

To: M+6 8:00 AM



Step 6: Select two reasons that reflect “Patient Declined” and “Patient Not Appropriate”

Specific override reason    

Specific override reason	
1	Patient Decline/Not interested [201008]
2	Physician Decline [201016] 
3	<input type="text"/> 

Criterion Logic **OR**

Note: The naming of these acknowledgement reasons differs across centers. The Johns Hopkins names are shown here, but you will need to select the ones that appropriate based on your OPA build.

Step 7: Change the data range to reflect the 6-month period following the initial OPA deployment at your center

Find OurPractice Advisories

Find Criteria

Date Range From: 8:00 AM To: 8:00 AM

Deployment date

Check criteria match this:

Report Settings - Best Practice Alert Usage_BPA TECH PROJECT [75924762]

Criteria | Display | Appearance | Summary | Print Layout | Toolbar | Override | General

Find OurPractice Advisories

Find Criteria

Date Range From: 5/6/2025 8:00 AM To: M+6 AM

- OurPractice Advisory
AMB T1D NOT ON AID SIMPLE
- Specific override reason
Patient Decline/Not interested OR
Physician Decline

Step 8: Click Display Tab. Move “OurPractice Advisory Detailed Actions” from Available Columns to Selected Columns by selecting it and clicking arrow. Click Save.

Report Settings - (New)

Criteria **Display** Appearance Summary Print Layout Toolbar Override General

Available Columns

Search available columns

OurPractice Advisory Detailed Criteria [98061]

+ Add

Selected Columns

- ALT ID [17701]
- ALT Name [17702]
- OPA ID [17703]
- OPA Trigger Place [17704]
- ALT Override Reason [17706]
- ALT Followup Action [17705]
- Alert User [34632]
- Alert Patient Name [34144]
- OurPractice Advisory Detailed Actions [98060]

Width (px): 200

Anchor: 0 Columns

Detailed Views

Detailed View	Display Name

Run Save Save As Restore Close



Criteria **Display** Appearance Summary Print Layout Toolbar Override General

Available Columns

Search available columns

- OurPractice Advisory Detailed Criteria [98061]



+ Add

Selected Columns

- ALT ID [17701]
- ALT Name [17702]
- OPA ID [17703]
- OPA Trigger Place [17704]
- ALT Override Reason [17706]
- ALT Followup Action [17705]
- Alert User [34632]
- Alert Patient Name [34144]
- OurPractice Advisory Detailed Actions [98060]
- Alert Comments [34630]



Anchor: 0 Columns

Detailed Views

Detailed View	Display Name

Step 9: Click Add. Search for Alert Comments to make it an Available Column. Click Accept.

Report Settings - Best Practice Alert Usage_BPA TECH PROJECT [75924762]

Criteria **Display** Appearance Summary Print Layout Toolbar Override General

Available Columns

Search available columns

Selected Columns

- ALT Name [17702]
- OPA ID [17703]
- OPA Trigger Place [17704]
- ALT Override Reason [17706]
- ALT Followup Action [17705]
- Alert User [34632]
- Alert Patient Name [34144]
- OurPractice Advisory Detailed Actions [98060]
- OurPractice Advisory Detailed Criteria [98061]**

Width (px): 200

Anchor: 0 Columns

+ Add

Detailed Views

Detailed View Display Name

Run Save Save As Restore Close

Report Settings - Best Practice Alert Usage_BPA TECH PROJECT [75924762]

Search Existing Columns

alert comments Search Advanced

Alert Comments [34630]

Data type: String

INI: ALT

Extension: IP/RW ALT - ALERT COMMENT [34440]

This column displays the comment associated with an alert.

Extension 34440- IP/RW ALT - ALERT COMMENT retrieves this data by first looking at the Specific Override Comment (I ALT 905) item. If a specific override comment is not found, the extension retrieves the Overall Override Comment (I ALT 510). If both items are empty, then "-" displays.

Technical Details:

Contact or Record based: Contact

INI/Item or Extension: IP/RW ALT - ALERT COMMENT (R LPP 34440)

1 / 1 Columns Loaded

Accept Cancel

Step 10: Move alert comments from Available Columns to Selected Columns by clicking right arrow. Click Save.

Report Settings - Best Practice Alert Usage_BPA TECH PROJECT [75924762]

Criteria **Display** Appearance Summary Print Layout Toolbar Override General

Available Columns

Search available columns

Alert Comments [34630]

+ Add - Remove

Selected Columns

- ALT Name [17702]
- OPA ID [17703]
- OPA Trigger Place [17704]
- ALT Override Reason [17706]
- ALT Followup Action [17705]
- Alert User [34632]
- Alert Patient Name [34144]
- OurPractice Advisory Detailed Actions [98060]
- OurPractice Advisory Detailed Criteria [98061]**

Width (px): 200

Anchor: 0 Columns

Detailed Views

Detailed View Display Name

Run Save Save As Restore Close

Step 11: Click Run to generate report.

Report Settings - Best Practice Alert Usage_BPA TECH PROJECT [75924762]

Criteria **Display** Appearance Summary Print Layout Toolbar Override General

Available Columns

Search available columns

Alert Comments [34630]

Selected Columns

- ALT Name [17702]
- OPA ID [17703]
- OPA Trigger Place [17704]
- ALT Override Reason [17706]
- ALT Followup Action [17705]
- Alert User [34632]
- Alert Patient Name [34144]
- OurPractice Advisory Detailed Actions [98060]
- OurPractice Advisory Detailed Criteria [98061]**

Width (px): 200

Anchor: 0 Columns

+ Add - Remove

Detailed Views

Detailed View	Display Name

Run Save Save As Restore Close

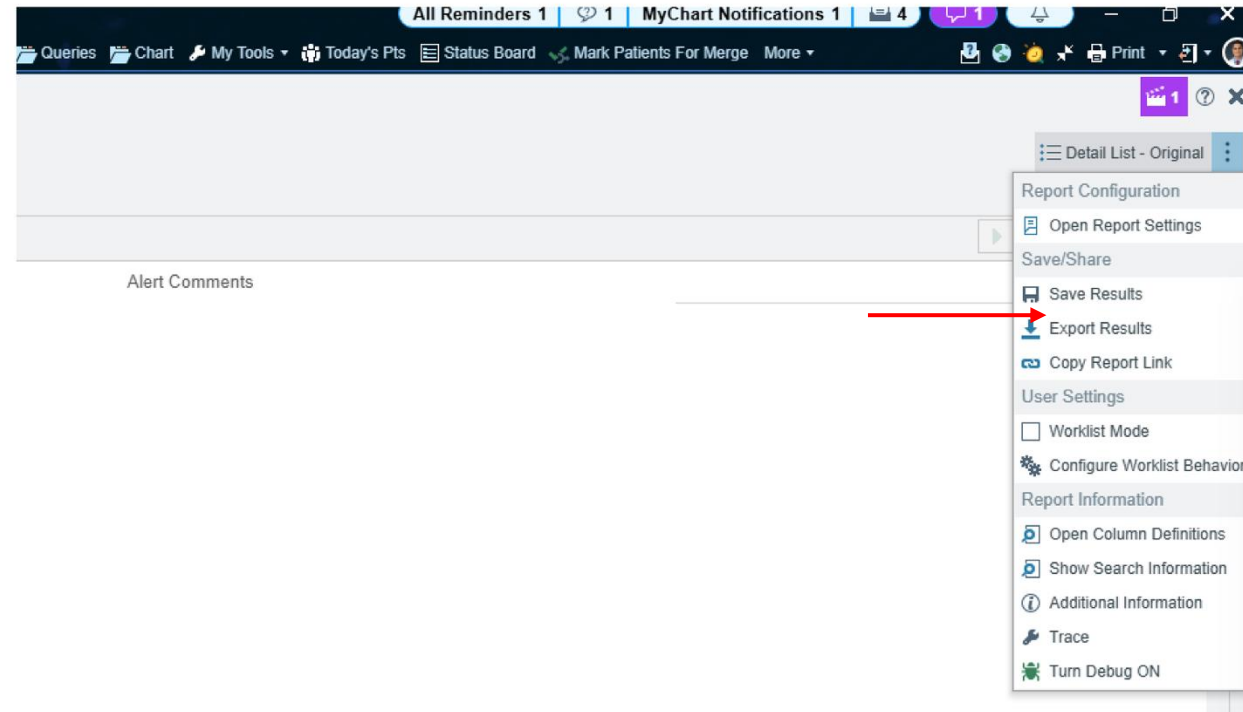
Detail List [Explore](#)

Filter

ALT ID	Warning Name	OPA Record Name	Trigger Point	Override Reason	User Follow-up Action	User	Patient Name	Detailed Actions	Detailed Criteria	Alert Comments
404034304	AMB T1D NOT ON AID SIMPLE	AMB T1D NOT ON AID SIMPLE	Open Patient Encounter	Patient Decline/Not interested	Acknowledge/Override Warning	[REDACTED]	[REDACTED]		Criteria - LGL: JHM CLAMB T1D ACTIVE PROBLEM OF TYPE 1 DIABETES E10 [21010407] Rule - CER: JHM AMB T1D Active Problem of Type 1 Diabetes E10 [210171705] Criteria - LGL: CL AGE 2+ [21051047] Rule - CER: JHM AGE >= 2 [1723314]	Newly diagnosed
404546494	AMB T1D NOT ON AID SIMPLE	AMB T1D NOT ON AID SIMPLE	Open Patient Encounter	Patient Decline/Not interested	Acknowledge/Override Warning	[REDACTED]	[REDACTED]		Criteria - LGL: JHM CLAMB T1D ACTIVE PROBLEM OF TYPE 1 DIABETES E10 [21010407] Rule - CER: JHM AMB T1D Active Problem of Type 1 Diabetes E10 [210171705] Criteria - LGL: CL AGE 2+ [21051047] Rule - CER: JHM AGE >= 2 [1723314]	Patient does not want device attached to body
404784610	AMB T1D NOT ON AID SIMPLE	AMB T1D NOT ON AID SIMPLE	Open Patient Encounter	Physician Decline	Acknowledge/Override Warning	[REDACTED]	[REDACTED]		Criteria - LGL: JHM CLAMB T1D ACTIVE PROBLEM OF TYPE 1 DIABETES E10 [21010407] Rule - CER: JHM AMB T1D Active Problem of Type 1 Diabetes E10 [210171705] Criteria - LGL: CL AGE 2+ [21051047] Rule - CER: JHM AGE >= 2 [1723314]	Newly diagnosed, having issues with CGM accuracy

Step 12

- Option 1: Export Report to Excel (if you have that privilege)- copy and paste relevant roles to Excel data collection sheet (codebook)
- Option 2: Manually add information to Excel data collection sheet (codebook)



Step 13

- Recode free-text using provided codebook
- More than 1 reason can be selected per patient

Recoding the Free Text Data:
Select most specific reason
possible

1. Not T1D, will update problem

Note: We do not expect this code to be used often when recoding Patient declined or Not Appropriate, but it is possible that providers will select the incorrect acknowledgment reason button to indicate this reason. (i.e. selected patient not appropriate because the patient does not have T1D, as opposed to selecting the “Not T1D, will update problem” button)

2. Patient declined/not ready

2. Patient declined/Not Ready

2.1. Needs more time/education

2.2. Undecided|

2.3.1. Not otherwise specified

2.3.2. Satisfied with current management

2.3.3.1. Past experience with AID

- 2.3.3.1.1. Too burdensome
- 2.3.3.1.2. Anxiety about hypo/hyperglycemia
- 2.3.3.1.3. Skin issues/adhesive allergy
- 2.3.3.1.4. Aesthetics/visibility of device
- 2.3.3.1.5. Privacy/data sharing concerns
- 2.3.3.1.6. Adverse outcome/safety issue (e.g. pump failure, DKA)
- 2.3.3.1.7. Lifestyle (sports, swimming, etc.)
- 2.3.3.1.8. Not specified

2.3.3.2. No prior experience with AID

- 2.3.3.2.1. Perceived burden (e.g. carb counting, site changes, troublesh
- 2.3.3.2.2. Anxiety about hypo/hyperglycemia, pump malfunction
- 2.3.3.2.3. Skin issues/adhesive allergy
- 2.3.3.2.4. Aesthetics/visibility of device
- 2.3.3.2.5. Privacy/data sharing concerns
- 2.3.3.2.6. Lifestyle (sports, swimming, etc.)
- 2.3.3.2.7. Not specified

2.3.4. Not interested in CGM

2.3.4.1. Past experience with CGM

- 2.3.4.1.1. Perceived burden
- 2.3.4.1.2. Anxiety about hypo/hyperglycemia
- 2.3.4.1.3. Alarm fatigue
- 2.3.4.1.4. Concerns about device accuracy
- 2.3.4.1.5. Skin issues/adhesive allergy
- 2.3.4.1.6. Aesthetics/visibility of device
- 2.3.4.1.7. Privacy/data sharing concerns
- 2.3.4.1.8. Adverse outcome/safety issue (device malfunction)
- 2.3.4.1.9. Lifestyle (sports, swimming, etc.)
- 2.3.4.1.10. Not specified

2.3.4.2. No prior experience with CGM

- 2.3.4.2.1. Perceived burden
- 2.3.4.2.2. Anxiety about hypo/hyperglycemia
- 2.3.4.2.3. Concerns about device accuracy
- 2.3.4.2.4. Alarm fatigue
- 2.3.4.2.5. Skin issues/adhesive allergy
- 2.3.4.2.6. Aesthetics/visibility of device
- 2.3.4.2.7. Lifestyle (sports, swimming, etc.)
- 2.3.4.2.8. Privacy/data sharing concerns
- 2.3.4.2.9. Not specified

2.4. Legal guardian/caregiver not available

3. Patient Not Appropriate

3. Patient Not Appropriate

3.1. Not otherwise specified

3.2. Diagnosis and clinical status

3.2.1. Newly diagnosed T1D

3.2.2. New patient to provider

3.2.3. Unclear diagnosis

3.2.4. Adequate endogenous insulin production, honeymoon phase, LADA

[REDACTED]

3.3.1. Not using CGM consistently

3.3.2. Technical limitation (Smartphone capability)

[REDACTED]

3.4.1. Unable to safely use AID

3.4.2. Previous challenges with CGM

3.4.3. Previous challenges with AID

3.4.4. Disease management concerns (complexity of medical illnesses)

3.4.5. Low engagement in care

3.4.6. Cognitive or developmental issues

[REDACTED]

3.5.1. Acute/competing priorities

3.5.2. Insufficient time during visit

3.5.3. Inadequate resources/staff

4. Cost/Insurance

- Note: We do not expect this code to be used often when recoding Patient declined or Not Appropriate, but it is possible that providers will select the incorrect acknowledgment reason button to indicate this reason. (i.e. selected patient declined because of cost considerations, as opposed to selecting the “Cost/Insurance” acknowledgement reason”)

5. Patient Ready, Deciding on Pump

- Note: We do not expect this code to be used often when recoding Patient declined or Not Appropriate, but it is possible that providers will select the incorrect acknowledgment reason button to indicate this reason. (i.e. selected patient declined because the process of deciding on the pump is still underway, when they should have selected “Patient Ready, Deciding on Pump”)

6. Pump Ordered, Not Yet Started

- Note: We do not expect this code to be used often when recoding Patient declined or Not Appropriate, but it is possible that providers will select the incorrect acknowledgment reason button to indicate this reason. (i.e. selected patient declined because the patient has not yet received the pump, when they should have selected “Pump Ordered, Not Yet Started”)

7. Already on AID, will update med list

- Note: We do not expect this code to be used often when recoding Patient declined or Not Appropriate, but it is possible that providers will select the incorrect acknowledgment reason button to indicate this reason. (i.e. selected Patient Not Appropriate because the patient is already on an AID system, when they should have selected “Already on AID, will update med list”)

Recoding process

- Transfer Name, Patient Identifier, and Alert Comment to provided Excel data collection sheet
- Recode each reason using the pull down list from the codebook in Sheet 1
- A max of 3 reasons can be listed per patient
- In Sheet 2, list your Center Name and the number of unique patients included in Sheet 1

Sheet 1: Recoding

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	Name	ID	Alert Comment	Reason 1	Reason 2	Reason 3												1. Not T1D, will update problem
2	John Doe	1234	Can't wear AID, works as lifeguard	<input type="text"/>														2.1 Patient declined - Needs more time/education
3				1. Not T1D, will update problem														
4				2.1 Patient declined - Needs more time/education														
5				2.2 Patient declined - Undecided														
6				2.3.1 Patient not interested - NOS														
7				2.3.2 Patient not interested - satisfied with current management														
8				2.3.3.1.1 Patient not interested in AID - Past Experience with AID - Too burdensome														
9				2.3.3.1.2. Patient not interested in AID - Past Experience with AID - Anxiety about hypo/hyperglycemia														
0				2.3.3.1.3 Patient not interested in AID - Past Experience with AID- Skin issues/adhesive allergy														
1				2.3.3.1.4 Patient not interested in AID - Past Experience with AID - Aesthetics/visibility of device														
2				2.3.3.1.5 Patient not interested in AID - Past Experience with AID - Privacy/data sharing concerns														
3				2.3.3.1.6 Patient not interested in AID - Past Experience with AID - Adverse outcome/safety issues (e.g. pump failure, DKA)														
4				2.3.3.1.7 Patient not interested in AID - Past Experience with AID - Lifestyle (sports, swimming, etc.)														
5																		2.3.3.2.4 Patient not interested in AID - No prior experience with AID - Aesthetics/visibility of device
6																		2.3.3.2.5 Patient not interested in AID - No prior experience with AID - Privacy/data sharing concerns
7																		2.3.3.2.6 Patient not interested in AID - No prior experience with AID - Lifestyle (sports, swimming, etc.)
8																		
9																		

46
47

Recoding Center Information +

Ready Accessibility: Good to go

Sheet 2: Center info

The screenshot displays the Microsoft Excel interface. The ribbon at the top includes 'think-cell', 'Home', 'Insert', 'Draw', 'Page Layout', 'Formulas', 'Data', 'Review', and 'View'. The 'Data' tab is active, showing options like 'Get Data (Power Query)', 'From Picture', 'Refresh All', 'Queries & Connections', 'Properties', 'Workbook Links', 'Stocks', and 'Currencies'. The spreadsheet shows columns A through G and rows 1 through 47. The data is as follows:

	A	B	C	D	E	F	G
1	Center Name	Johns Hopkins Adult					
2	Number of Unique Patients Included	1503					
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The bottom navigation bar shows the 'Center Information' tab selected, with a '+' sign to its right. The status bar at the bottom indicates 'Ready' and 'Accessibility: Good to go'.

Data Sharing

- Save a copy of the Excel document in a **secure location** per your institution's requirements
- Create a **new, de-identified copy** of the Excel document:
 - Remove Patient Name
 - Remove Patient ID
 - Remove Alert Comments
- Save file: “YYYY-MM-DD_Center Name_BPA-TECH Thematic Analysis”
- Email de-identified dataset to coordinating center (T1D Exchange) by 6/1/2026

Communication

- Please reach out to coordinating center if you are encountering roadblocks or challenges at any step

