Home INR Monitoring

USING PATIENT PORTAL TO ENGAGE PATIENTS AND GATHER DATA

CHARLES KITZMAN, MMI CHIEF INFORMATION OFFICER SHASTA COMMUNITY HEALTH CENTER DECEMBER 6 2016

Agenda

- Introduction
- General Portal Concerns/Strategies/Feedback
- Development of the Concept/Drivers/Goals
- Build Barriers Implementation Lessons Learned
- Process
- Demonstration
- Discussion

Vital Signs

- FQHC Since 1988 32,000 Unduplicated pts
- 140,000 Encounters
- 40 FT Providers
 - Primary Care/Pediatrics/Behavioral Health/Ryan White/Homeless
 - Residency 2-2-2 | NP/PA Post Graduate Fellowship
 - 19/19 Score HRSA Site Visit June 2015
- NextGen shop. EPM 2004/EMR 2007
- "We go first a lot."
 - Portal/EPCS/Scribes/HIE





Timeline and Numbers

- Went live Oct 2011 Phased Approach
- Communications→Refills→Appointments→PHR
 →Interactive Forms→ Bill Payer
- 39182 Enrollees (Including Declinations)
- 2755 Super Users >3/yr uses since signing up
- > 53K messages handled
- 5000 appointment requests
- 10K Medication refills

Meaningful Use

 Electronic access to health records

Patient Centered Medical Home

 Patient -centered health IT and analytic tools

Health Reform

 Strategic
 differentiator for patient engagement

Drivers

Benefits

Patients:

- Conveniently view personal health information
- Request / schedule appointments
- Communicate securely with providers
- Links to credible info

Clinics Providers:

- Administrative efficiencies (less calls)
- Push routine tasks to care team
- More time for critical patients

Patients:

- "Digital Divide"
- Literacy
- Language
- Privacy concerns

Providers:

- Potential for added work
- Lack of reimbursement
- Inappropriate use by patients
- Liability for security breaches

Barriers

Hows it Work?

- *Uses Patient email as point of contact
 - *Less likely to change than a physical address/phone
 - * Notifications are sent to email prompting patient to visit the portal
- *Functionality = Basic Communications, Medication refill requests, Appointment requests, Forms*, Pt Education
- *Can send documents created by EMR/Scans through portal
- *Try to make the phone ring less
- *Move toward data capture/patient engagement

Set Expectations

*Respond within 2 business days
*Keep communication methods congruent
*Can request but not *make* appointments
*Establish trust in the tools by exceeding expectations
*Solicit input via surveys and advisory groups

Obstacles

*How to manage minor confidentiality *Promoting use/make it attractive* *Issues with user security (nurse) *Lack of analytics from vendor *****PHR updates *Staff Engagement

Monitoring

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Using the Tools you Have

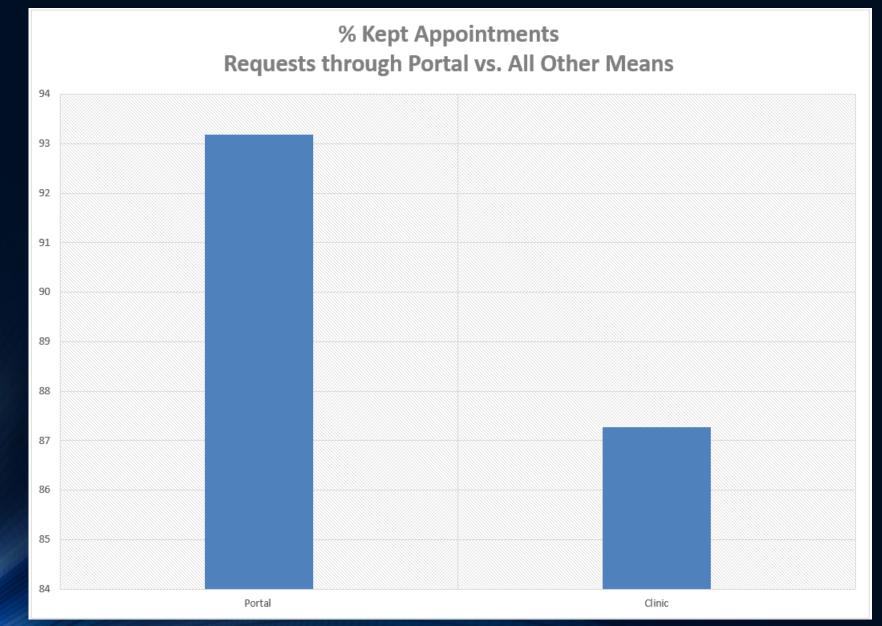
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- Pentaho
- SQL/SSRS

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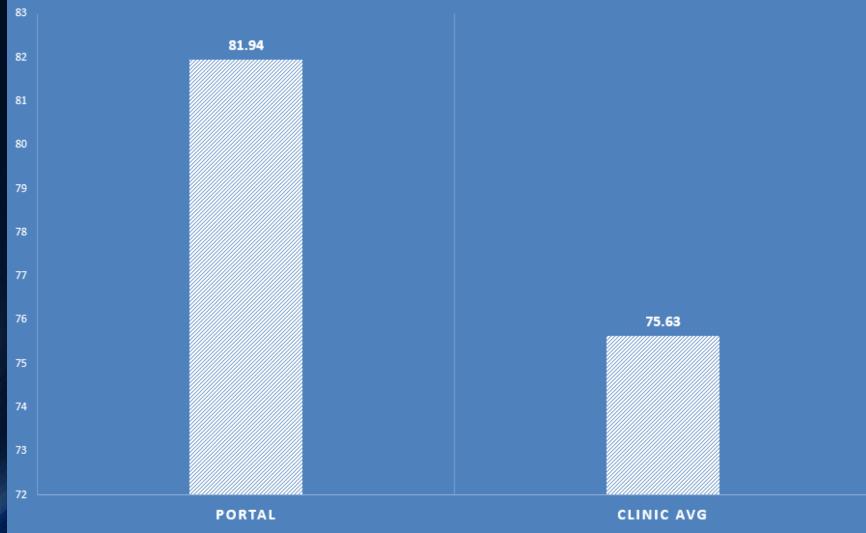
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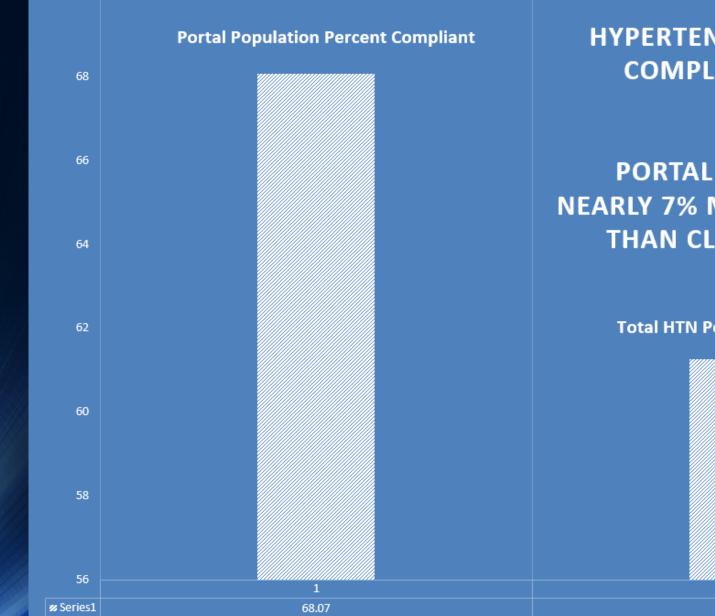
- *Slow climb/be patient Even the best systems took time
- *Expect greater mobile device integration in the future *Alternative Touch option Providers carry most weight in promoting the tool

Outcomes/Use Data to Promote









HYPERTENSION PATIENTS COMPLIANCE RATES

PORTAL POPULATION NEARLY 7% MORE COMPLIANT THAN CLINIC AVERAGE

Total HTN Population Compliant

61.26

Advice/Takeaways

*Route messages using existing workflows
 *Establish trust in the system by answering ASAP/Service Model

*Compare tools and challenge vendors

Engage clinicians to help promote the product

*Monitor and analyze for trends/build canned responses

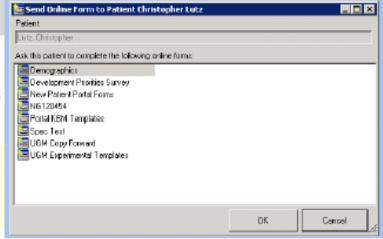
Portal Data Forms

Agenda

- Life Cycle of Online Forms (Templates)
- Online Forms
 - KBM Patient Portal Templates (Online forms)
 - Custom Created Templates (Online Forms)
 - Publishing Form Sets
- Supported Functionality
- Interactive Medical History (IMH)
 - IMH Discrete



- The template is assigned to the patient.
 - Enrollment
 - Manual Assignment
 - Attachments to communications

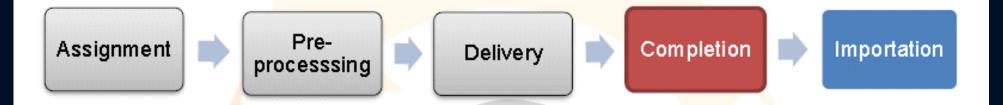




- Preprocessing Event
 - Demographic information is extracted and prepopulated
 - Copy Forward Data is prepopulated
 - The NextGen Communication Services fires the special "Prepopulate" triggers
 - Snap shots of picklists are taken

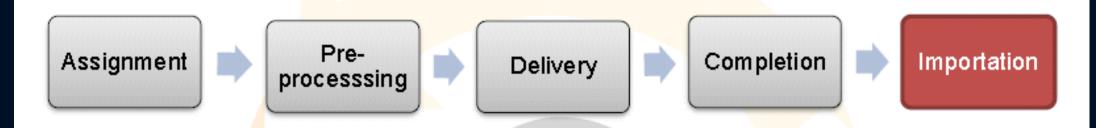


- Delivery
 - Template is posted to the website
 - Patient Receives the email notification



- Completion
 - Patient completes the template online
 - Template is delivered to the practice for importation

Established	d Patient - Update Packet (Page 3 of 5)	~
G Back to	io Inbox 🔇 Previous 🕤 Next 🔛 Submit Completed Forms 🎒 Print	
F	Past Surgical History	
	Please select any of the surgeries or procedures you have ever had.	
1	📄 Abdominal aortic aneuryom	
	Appendicitis of a pelvic appendix.	
	Cancer	1



- Importation
 - Staff Member Imports the template
 - Template tables are populated.
 - Post Data Import Triggers are fired.

Existing Online Forms (Templates) Available

Template Name	Display As Name
nxmd_demographics	Patient Portal Demographics
nxmd_FamilyHealthHX	Patient Portal – Family Health History
nxmd_PastMedHX	Patient Portal – Past Medical History
nxmd_PastSurgHX	Patient Portal – Past Surgical History
Nxmd_spec_type	Patient Portal – Spec Template
Nxmd_config	Ngkbm Nxmd Template Config

Existing Online Forms (Templates) Available

Template Name	Display As Name
nxmd_social_hx	Patient Portal – Social History
nxmd_ob_SHX	Patient Portal – OB Social Hx
nxmd_peds_sochx1	Patient Portal – Peds Social HX 1
nxmd_peds_sochx2	Patient Portal – Peds Social HX 2
nxmd_peds_sochx3	Patient Portal – Peds Social HX 3
nxmd_meds_allerg	Patient Portal – Medications and Allergies

Select Template ×	
Ngkbm Eyeconfig Ngkbm Immunizations Ngkbm Manage Custom Links Ngkbm Medication Classes Ngkbm Ob Ed Custom Ngkbm Ob Ed Custom Ngkbm Office Diagnostics Ngkbm Peds Dev Definition Ngkbm Proc Timeout Config Ngkbm Psafety Report Ngkbm Recommended Care Ngkbm Setup Flowsheets	Ngkbm Nxmd Template Config
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OK Cancel	

e	Template Type /	Template Name	Display 1	Display 2	Display 3	Display 4	Display 5
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si st	Family History	nxmd_spec_type_RD_FH	Abdominal aortic	ADD/ADHD	Alzheimer's disease	Anxiety	Angina, grandparen
	Family History	nxmd_FamilyHealthHX	Hypertension	Diabetes	Depression	Cancer	
In ty/	Past Medical History	nxmd_PastMedHX	Acute appendicitis with appendix abscess	Cancer	Congenital muscular hypertrophy-cerebral syndrome		
La Ch	Past Surgical History	nxmd_PastSurgHX	Abdominal aortic aneurysm	Appendicitis of a pelvic appendix	Cancer		

Patient Portal Template Customization

The following is used to configure the Patient Portal templates copied from nxmd_spec_type template.

Open R Custom Patient Portal templates (Double-cick a row to add or edit items in that row.) Delete Template Type / Template Name Display 1 Display 2 Display 3 Display 4 nxmd_spec_type_RD_Alle (D)-LIMONEN 0.3 % SODIUM Allergies Add New FLAVOR Open CHLORIDE nxmd_spec_type_RD_FH Abdominal ao Alzheimer's disease Anxiety Family History Delete aneurysm Sort Special Family History nxmd FamilyHealthHX Hypertension Add New Depres Cancer Past Medical nxmd PastMedHX congenital muscular Acute append Sort Special History with appendic hypertrophy-cerebral Cancel syndrome abscess Cancel Past Surgical nxmd_PastSurgHX Abdominal ao Cancer Default Sort Default Sort History aneurysm 1 ۲

Contact: (215) 057-7010 (H) Enterprise ("Pati: "Portal temple"	Nxmd Template T
Patient Portal Template Customization	Template type:	Allergies Family History Medications
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2.) Launch the configu 7.)		

Patient View

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Dack to In	
Pa	ast Surgical History
	Please select any of the surgeries or procedures you have ever had.
	Abdominal aortic aneurysm
	Appendicitis of a pelvic appendix
	Cancer
	Comments:

How to Use the "Spec Type Template"

- Make a copy of the template in template editor
 - Know which category content you plan to configure this copied template for and possibly name it accordingly.
- Set up the template in System/Practice template NGKBM NXMD
 Template Config
- Publish template via a form set

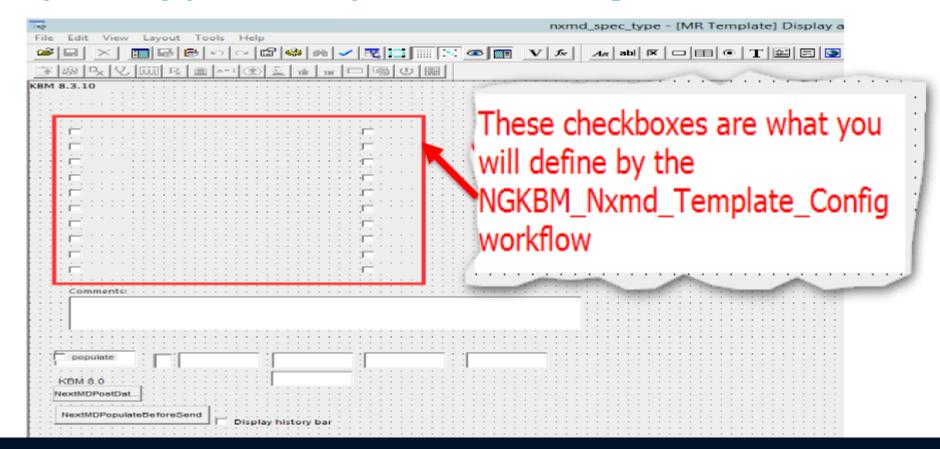
"Spec Type" template

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nxmd_pastmedhistory	Medical Records	Allie Smith	09/23/13 01:20 PM
nxmd_PastMedHX	Medical Records	Allie Smith	09/23/13 01:20 PM
nxmd_PastSurgHX	Medical Records	Allie Smith	09/23/13 01:20 PM
nxmd_peds_sochx_1	MR Popup	Allie Smith	09/23/13 01:20 PM
nxmd_peds_sochx_2	MR Popup	Allie Smith	09/23/13 01:20 PM
nxmd_peds_sochx_3	MR Popup	Allie Smith	09/23/13 01:20 PM
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OB_Accuracy_Help	MR Popup	Allie Smith	09/23/13 01:20 PM
4			Þ
Find Templates 💌 that r	natch these search criteria:		
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emplate name: nxmd_spec_typ	e		Cancel
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"Spec Type" template - copy

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"Spec Type" template - configure



Copied "Spec Type" template - configured

Custom Patient Portal templates (Double-click a row to add or edit items in that row.)

Template Type	Template Name	Display 1	Display 2	Display 3 T	Display 4	Display	5	
Family History	nxmd_FamilyHealthHX	Hypertension	Diabetes	Depression	Cancer			
Past Medical History	nxmd_PastMedHX	Acute appendicitis with appendix abscess	Cancer	Congenital muscular hypertrophy-cerebral syndrome				
Past Surgical History	nxmd_PastSurgHX	Abdominal aortic aneurysm	Appendicitis of a pelvic appendix	Cancer				
Family History	nxmd_spec_type_RD_FH	Abdominal aortic aneurysm	ADD/ADHD	Alzheimer's disease	Anxiety	Angina,	grandparent	
Allergies	nxmd_spec_type_RD_Alk		0.2 MICRON FILTER	0.3 % SODIUM	0.9 % SODIUM	1,2-HEX	ANEDIOI	
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<u> </u>							Add Nev	,

Sort Special

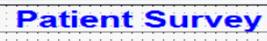
Default Sort

Cancel

How to customize Patient Portal templates:

- In template editor, copy the template nxmd_spec_type. It is recommended to name the template according to the speciality and type of template. You must choose "Create New" as the Template Fields option. For example a Pediatric medication template would be named nxmd_peds_meds.
- 2.) Launch the configuration popup from the Custom Patient Portal templates grid. Right-click and select add new.

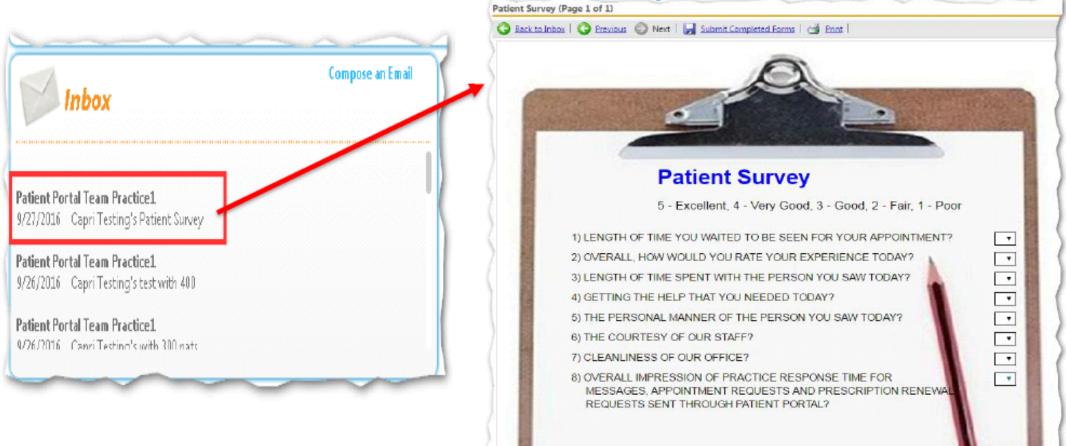
Create Template – Sample



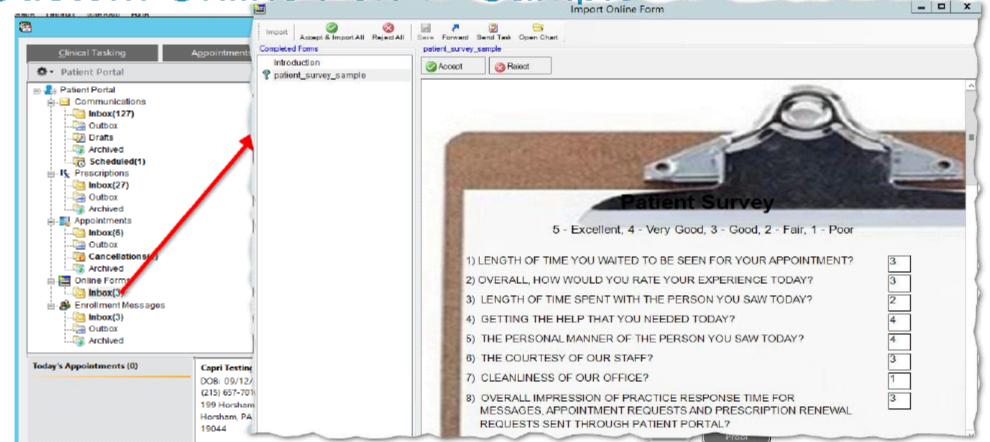
5: - Excellent; 4: - Very Good, 3:-: Good; 2: - Fair; 1: - Poor :

 LENGTH OF TIME YOU WAITED TO BE SEEN FOR YOUR APPOINTMENT?
 OVERALL, HOW WOULD YOU RATE YOUR EXPERIENCE TODAY?
 LENGTH OF TIME SPENT WITH THE PERSON YOU SAW TODAY?
 GETTING THE HELP THAT YOU NEEDED TODAY?
 THE PERSONAL MANNER OF THE PERSON YOU SAW TODAY?
 THE COURTESY OF OUR STAFF?
 CLEANLINESS OF OUR OFFICE?
 OVERALL IMPRESSION OF PRACTICE RESPONSE TIME FOR MESSAGES, APPOINTMENT REQUESTS AND PRESCRIPTION RENEWAL REQUESTS SENT THROUGH PATIENT PORTAL?

Custom Online Form - Sample

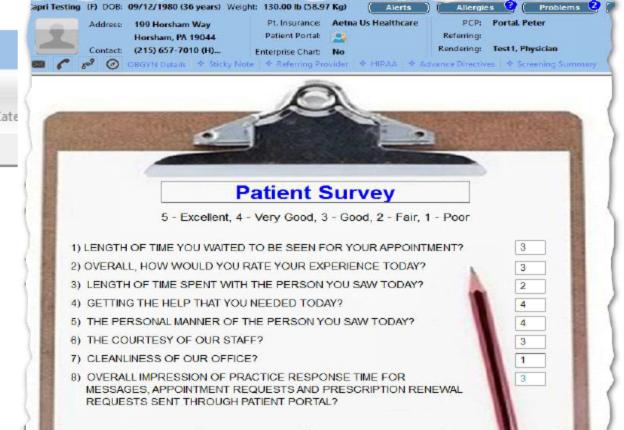


Custom Online Form - Sample



Custom Online Form - Sample

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	P	atient Su	urvey Sample	Э	
	10/13/	2016 11:	17 AM EDT		
	li 10/10/	2016 09:	14 AM EDT		
	10/03/	2016 03	03 PM EDT		

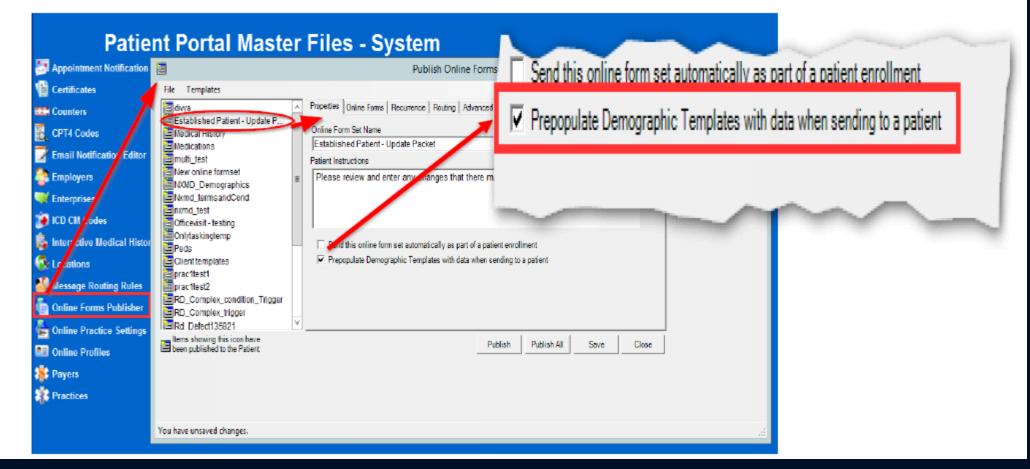


Reporting

Publishing Templates

- Create Form Set for patients to fill out
- Configuration Options
 - Prepopulating with Data
 - Automatically sending forms as part of an enrollment
 - Assigning templates to the Form Set
 - Recurrence
 - Routing

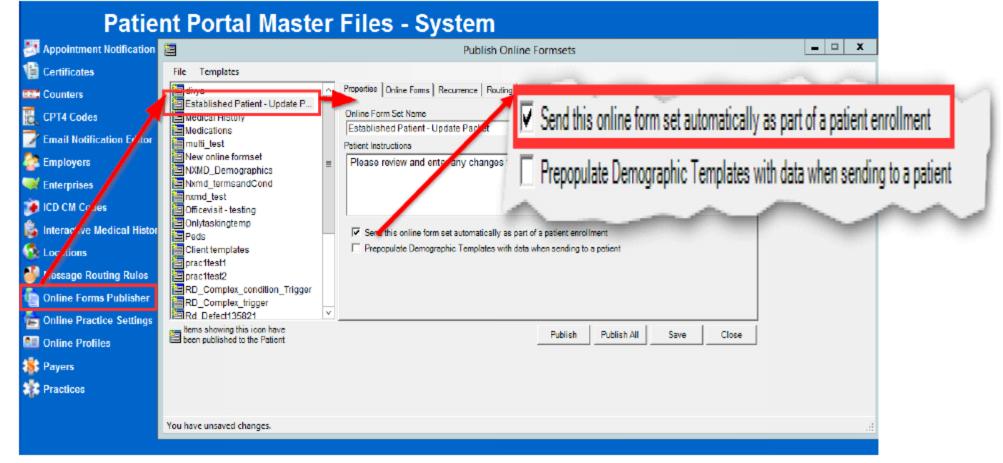
Online Form Set - Data Pre-population



Online Form Set - Data Pre-population

- When the "Pre-populate flag is set" the following data is fetched
 - Data from demographic tables
 - Medical Record Template fields with the "Copy Forward" attribute
 - The "Pre-populate" special event will fire.

Online Form Set - With New Enrollment



Online Form Set - Assigning Templates

In Translation	
ile Templates divya ^ Established Patient - Update P Propertie Medical History EHR Templates that are part of this online formset Medications nxmd_FamilyHealthHX multi_test nxmd_PastMedHX New online formset nxmd_PastMedHX NXMD_Demographics nxmd_demographics Nxmd_termsandCond nxmd_demographics Onlytaskingtemp Patient Survey Peds Planned Parenthood Northern	

Online Form Set - Recurrence

ile Templates divya Established Patient - Update P Medical History Medications multi_test New online formset NXMD_Demographics Nxmd_termsandCond nxmd_test Officevisit - testing

Online Form Set – Routing Rules

	Publish Online Formsets
ile Templates divya Established Patient - Update P Medical History Medications multi_test New online formset NXMD_Demographics NXMD_Demographics Nxmd_termsandCond nxmd_test Officevisit - testing Onlytaskingtemp Patient Survey	Properties Online Forms Recurrence Routing Advanced This template set is of the following type: Est Pt Packet (These values are defined in the routing rules editor) When a patient completes this form set, send a task list item t Name Dr., Jones John, Smith (These values are defined in the routing rules editor)
Peds Planned Parenthood Northern	

SCHC Custom Template – INR project

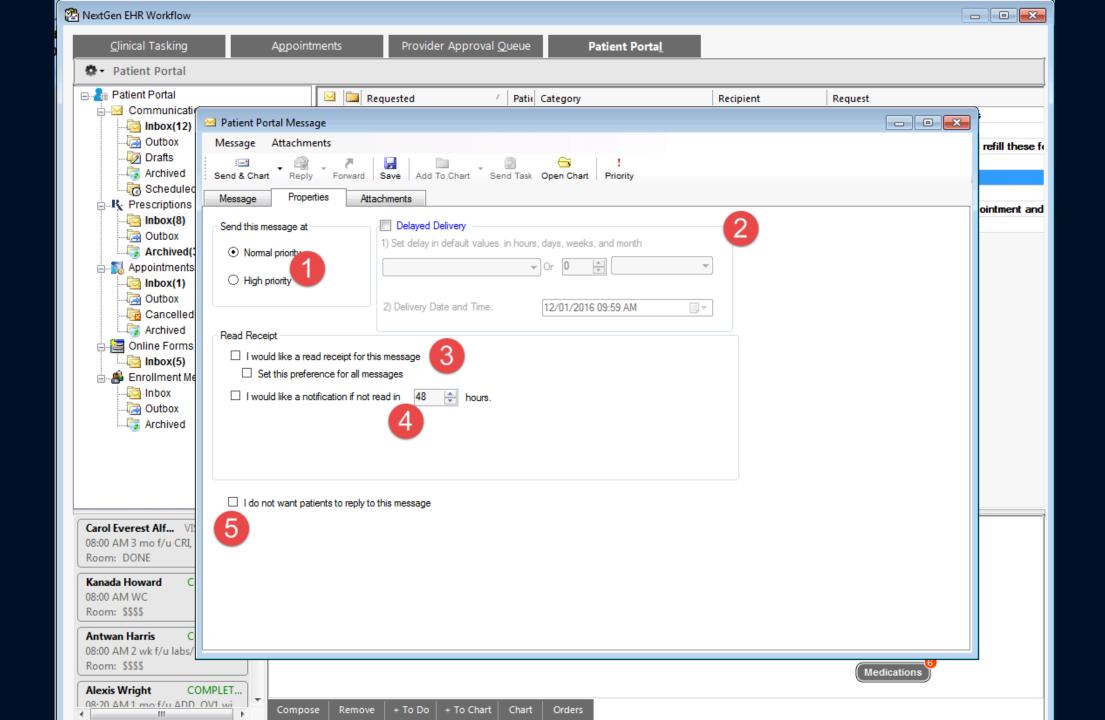
- PDSA Plan Do Study Act Requirement for all Managers
- Coumadin Program 200 patients. 1 RN manages using integrated EHR/Reporting process.
- Some Medicare patients have Home INR monitors
- Generally more complaint than rest of cohort
- Medicaid does not cover Home INR machines

If Medicaid Pts had Home INR, will it improve compliance?

- Identify 10 patients with the following criteria
 - Partnership Health (MediCal Managed Care Patients
 - History of non-compliance
 - Been in the program for at least 18 months.
- Purchase Machines and Distribute to 10 patients
 - If not portal account, create one.
 - Train on both machine and portal at next scheduled appointment.
- Get data
 - Ask PHC for True cost going back 18 months on all 10 patients
 - Compare to the pilot after 6 months.
- Present Case to PHC

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🔁 NextGen EHR Workflow		
<u>C</u> linical Tasking	Appointments Provider Approval Queue Patient Portal	
🔅 - Patient Portal		
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Patient Side

PROVIDING INFORMATION VIA TEMPLATE TO CLINICAL TEAM

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Patient Portal Dashboard)						Linda Test		~
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Anticoagulant Home Monitoring - Message From: Coumadin Nurse								
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Anticoagulation Management Home Reporting

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Please follow the on-screen instructions and complete the following forms that have been sent to you from your practice. If you have any questions or concerns please contact your practice.

Please click the **<u>Next</u>** button to begin filling out your on-line medical forms.

Special Instructions from your practice:

Please enter your daily PT/INR results and questionnaire so that we can track your progress.

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Anticoagulation Management Home Reporting

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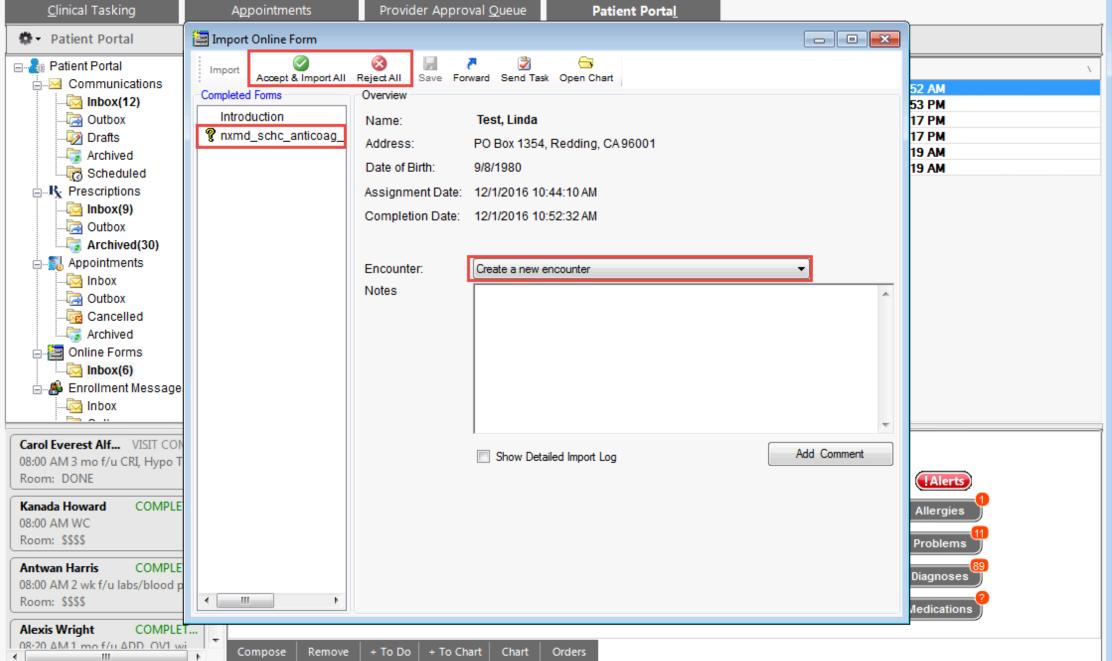
Thank you for taking the time to complete these online forms. Your completed forms have been submitted to your practice for review.

Practice Side

MANAGING INBOUND INFORMATION

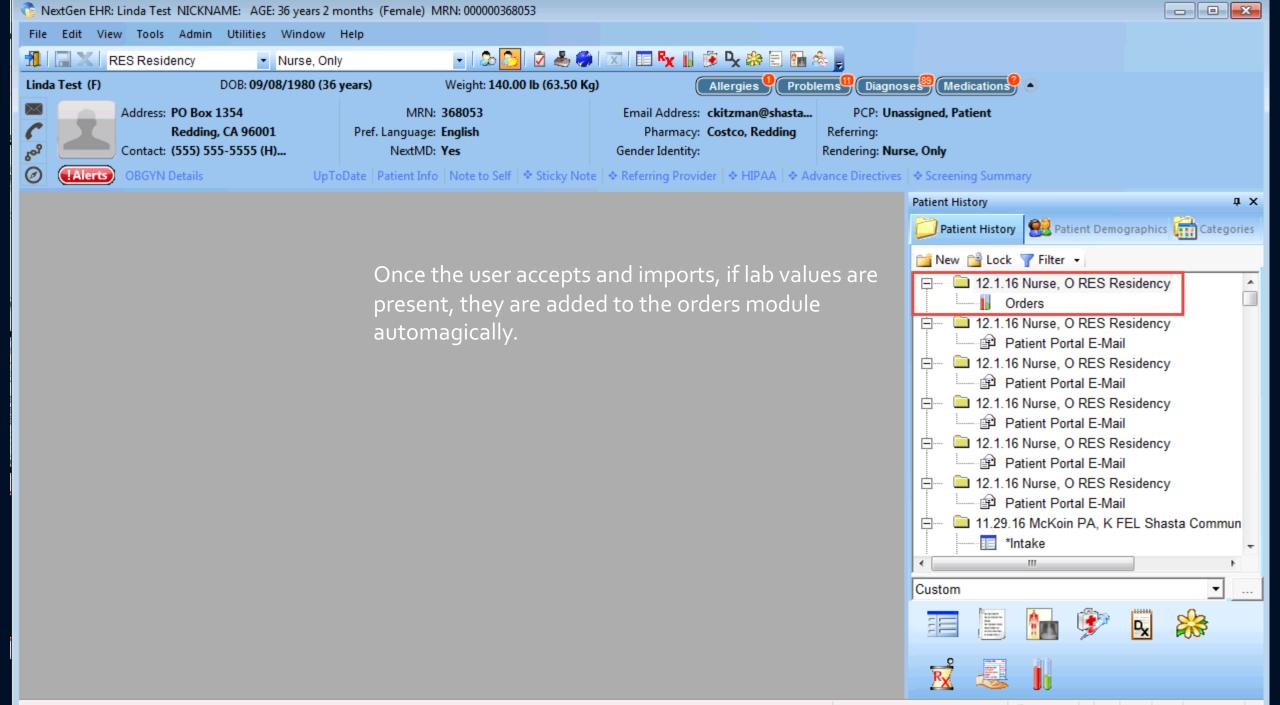
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Lind	a Test (F) DOB: 09/08/1980 (36 years) Weight: 140.00 lb (63.50 Kg) Allergies Problems Diagnose Medications? •	
	(Alerts) OBGYN Details Up ToDate Patient Info Note to Self * Sticky Note * Referring Provider * HIPAA * Advance Directives * Screening Summary	
4 /	12/01/2016 11:15 AM : "Anticoagulation Dosing" x	· · · · · · · · · · · · · · · · · · ·
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Communit	Intake Anticoagulation SOAP Finalize Checkout Standing OrdersAdult Immunizations Peds Immunizations My Plan Procedures Order Management Document Library Care Guidelines Global Days Panel Control: © Toggle @ Cycle ♥	 □ 12.1.16 Nurse, O RES Residency □ Orders □ *Intake □ 12.1.16 Nurse, O RES Residency □ 12.1.16 Nurse, O RES Residency □ Patient Portal E-Mail
	General Information Patient Active in Anticoagulation Tracking E Caregiver: Preferred Lab: Preferred Lab:	 12.1.16 Nurse, O RES Residency Patient Portal E-Mail 12.1.16 Nurse, O RES Residency Patient Portal E-Mail 12.1.16 Nurse, O RES Residency 12.1.16 Nurse, O RES Residency
	Order and Dosage Information Coumadin Initiated: Date of Initial Referral: Expected Duration Sun Mon Tues Weekly Total	 Patient Portal E-Mail □ 12.1.16 Nurse, O RES Residency □ Patient Portal E-Mail
	Month Year of Therapy: 5	
	Notify clinician if INR < 1.5 or > 5 Submit	Letter to L. Test
	Anticoagulation Management Initial Visit Checklist Print Letter 1 Print Letter 2 Dosing Letter INR Home Monitor Agreement INR Date Result View Home Report Time Interval Image: Started eating beef and bok choy Next INR due Image: Started eating beef and bok choy Next Provider Education given on medication, diet, interactions and complications? Yes No Order Comments: Clear Image: Started eating beef and bok choy Image: Started eating beating beef and bok choy Image	 NGP1141145: Pap + HPV Physical Therapy Referral (2) WH - GYN - HRT/PCOS Referral (1) Problem Orders 11.29.16 McKoin PA, K FEL Shasta Communication: 11/29/16 Communication: 11/29/16 Anticoagulation Dosing Telephone Call Anticoagulation_Dosing Orders
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NGProd Shasta Community Health Center 🚨









Demo and Discussion

CHARLES KITZMAN, MMI

CKITZMAN@SHASTAHEALTH.ORG @CIO4SCHC LINKEDIN