Digital Health Outreach Playbook



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PROJECT GOALS

1. Support efforts to increase access to personal health records and telehealth opportunities for Alameda Health System patients.

2. Assist patients in enrolling into MyChart electronic health communication portal.

3. Collect accurate patient data on technological preparedness and demographic information.

4. Ensure appropriate clinical follow-up for patient medical concerns.

Which patients to contact?

Three Methods for receiving patient information for outreach:

There are three ways for you to gather patient information to begin your outreach efforts: 1) *In basket CC'd charts* or 2) *Departmental schedule method or 3) Work an outreach list*. Instructions for both can be found below.

1. In basket CC'd charts:

1. Upon opening EPIC, you will see information about charts sent to you in *In Basket Glance*. Click on *CC'd Charts*.

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Care Manager Home	•			
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CC'd Charts	0	6	My High Risk Patients with No Visit in 3 Months	
Staff Message	0	1		
			Care Transitions Reports	Ø
AHS_CCM_EDIP_VISITS		¢ :	✓ Helpful Reports All Care Transitions Patients Care Transitions Patients w/ Episodes opened over 30 days ago	

2. Click on the patient record and then select "*Open Chart Review*." You are now ready to review the patient's chart.



2. Departmental schedule method:

1. If necessary, change the clinical context to match the department of the clinician whose schedule you are looking-up.

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2. At *Change Login Information,* enter the appropriate department. You can enter partial department names and use the search function.

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CCM PATIENTS EDIP VISITS		Helpful Reports All Care Transitions Patients		~

3. Click on the schedule icon. This will open a calendar that allows you to view the department schedule for a specific date.

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Care Manager Home	•	© :	Complex Care Management Reports	0 :	^
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4. Click on the schedule date of interest. This will provide a list of patients and providers for the given date. Click on the patient record you are interested in reviewing.

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		Select a patien	nt to get started.		

5. Click on *Open Chart Review*. You are now ready to review the patient's chart and gather patient demographic information.

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HGH PAIN MGMT CLINIC OCHIN Sutter Health Affiliates an UCSF Medical Center, Ben	d Community Connect Practices ioff Children's Hospitals San Francisco / Oakland, and Affiliated Practices	
C Demographics	Medications, History (Medical, Tobacco)	~

3. Work an outreach list method:

For Tech Advocates in Wellness Centers - the panel manager will work with you on a weekly basis to provide outreach lists. You will need to go into those patients' charts to look up patient information and create telephone encounters to document your work.

Gathering patient information before outreach attempt

RATIONALE:

In order to assess patient technological resources and to compare MyChart enrollment patterns among different populations, we are collecting demographic data and administering a brief survey.

1. Select the *Demographics* tab. This opens the *Contact Information* tab. You can find ethnicity, gender, DOB, phone numbers, and email here.

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Slide from ED Public Health Team Toolkit 7.14.20

1a. Additionally, look to the left of your screen to the area beneath the patient photo where you will see one of the following 4 icons, designating the patient's MyChart activation status.



2. Select the *Clinical Information* tab to find race and preferred language.

96	Hyperspace - Alameda Health System	- Production Environment (PRD) - H	IGH ED 🔤 🔹 🗖 🗙
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	Chart Review Care Everywhere Demographics Fy1 Trea	ment Team Assignment Notes Track	ing 💌 👂
	Contact Information Clinical Information	Additional Information Ad	Vance Directives Inpatient Information
	Patient Lists	Primary Location: Highland Hospi	ital
		Provider	PCP type
(4) Discharged		FLATTERY, DAVIDA NICOLE [783]	General
Total Time: (201:30			
Code: Assume Full (no ACP docs)	Pharmacy Preterences	EpicCare Patient Restricted	d access
CHIEF COMPLAINT Cough, Chest Pain	Lab Preferences	Code status: Comments:	Date updated:
		Context:	Code Status History
	Interpreter needed? No P	Preferred language: English	
	Religion: Catholic	Veteran? No, never	served
BOURED DOCUMENTATION 3 Overdue	Branch of Service:	Written language: 1 Spar	nish 📩
DISPOSITION	1 Other		
Discharge	Permanent comments: 10 1 10 1 2 2 + Insert Smarffext		
 Chest pain, unspecified type 			•

Slide from ED Public Health Team Toolkit 7.14.20

Contacting Patient by Telephone

Telephone protocol

Call each patient who has an INACTIVE or PENDING MyChart activation status. Call each of the patient's phone numbers once, excluding their emergency contact. If you are unable to reach them, please try their preferred number a second time. **Do not leave any voicemail messages**. If you are unable to speak to a patient by phone, please send them an activation code. To dial from your personal phone or any non-Alameda Health System Phone you have two options:

1. Use *67 before entering the patient's phone number. This will block your number. Many patients do not answer blocked numbers.

2. Use an ap for Android or iPhone called Doximity which will display the Alameda Health System Call Center's phone number in the patient's caller ID. In order to set up a Doximity account, email Dr. Jenny Cohen with your cell number and a brief message requesting Doximity access.

Translator services

1. Call the translator line (510-437-4491) and choose from the list of languages.

2. Tell the operator or translator that you are calling from the office you are supporting (Highland Hospital Pain Clinic for example).

3. A translator or operator will ask for the patient's name and medical record number and which number your wish to call.

4. If you get voicemail, do not leave a message

Phone script

Please use the following script when contacting patients.

"Hello, my name is [your name] and I am calling from [department name]. I am calling in order to help you enroll in MyChart, our electronic communication tool so that you can better access services in our health system like getting refills, asking your doctor questions, getting a summary of your visit and instructions, and looking at test results.

You'll learn more about the tool after your visit with your clinician, but spending a few minutes on the phone together now, we can help make sure you get the most out of your upcoming visit.

Are you interested in enrolling?"

If the answer is yes	If the answer is no
1. Verify patient date of birth	1. Ask technological resource questions below.
2. Ask technological resource	
questions below	2. Begin documentation process. (see page)
3. Send activation code and introductory email. (see page)	

page) Additionally, ask the following questions regarding technological resources within the

4. Begin documentation process (see

Additionally, ask the following questions regarding technological resources within the course of your discussion. Some patients may not have the time nor interest in answering these questions. Please respect these patients' wishes and do your best to ask the technological resource questions to as many patients as you can.

Technological Resource Questions

- Do you have a functioning computer at home?
- Do you have a smart phone?
- Do have an unlimited data plan?
- Do you have the internet at home?
- Are you interested in doing a video visit?

For patients who want help enrolling in MyChart, teach them first how to use speaker phone so that they can talk to you while manipulating aps and email on their phone.

We are working on a patient-facing pictorial-based tip sheet. V2 as of 9/8/2020 is below:

MyAlamedaHealth





My Alameda Health Download App Tip Sheet

To help the patient download the app on their phone and signup for My Alameda Health in the waiting room or the exam room follow the workflow.

Send Email from Epic

- 1. From the patient Storyboard or Rooming, select the MyChart icon
- 2. Select the email address option
- Enter the patient email address (if there is already an email address in the field, confirm with the patient that it is correct)
- 4. Click send



Ask the patient to follow these instructions

- 1. On the patient's phone: Open email from noreply@alamedahealthsystem.org
- 2. Select the link to sign up for My Alameda Health now

N noreply@alamedahealthsystem.org Signup information for My Alameda Health

Dear Ed Test,

My Alameda Health allows you to send messages to your doctor, view your test results, schedule appointments, and more.

Use this link to sign up for My Alameda Health now.

- 3. The patient will enter a User name,
- 4. The patient will enter a password
- 5. The patient will enter their date of birth
- 6. The patient will check the box agreeing to the terms and conditions.
- 7. Select submit



- 8. The patient will receive a confirmation
- 9. The patient will elect the App store the patient uses for the device



- 10. The App store or google play will open to the app to download
- 11. The patient needs to download/get the MyChart app by Epic
- 12. The patient will need to install the MyChart app
- 13. The patient needs to open the MyChart app





- 14. The patient needs to accept the Licensed application end user license agreement
- 15. The patient should allow MyChart to "access your location".



Install

LICENSED APPLICATION END USER LICENSE AGREEMENT

The MyChart for iPhone software product (the "Product"), as made available through the Apple, Inc. ("Apple") App Store, is licensed, not sold, to you. As used herein, "you" and "you" refer to the individual or entity that wishes to use the Licensed Application. Your license to this Product is subject to your prior acceptance of this Licensed Application End User License Agreement (this "License"), and you agree that the terms of this License will apply to this Product. Your license to this Product under this Licensed Application End User License Agreement is granted by Epic Systems Corporation ("Licensor"). This Product, as subject to the license granted under this License, is referred to herein as the "Licensed Application." Licensor reserves all ownership and intellectual property rights in and to the Licensed Application.

This Licensed Application supports the iPhone as well as the IPad and IPod touch devices, and certain supported data networks, and enables users to access, review and use certain data (and perform certain actions with such data) where such data is provided by a connection to an instance of the Licensor's server edition of MyChart, an application licensed by a third party (typically, your medica provider) under a separate agreement with Licensor.

a. Scope of License: This license granted to you for the Licensed Application by Licensor is limited to a nonexclusive, non-transferable, non-sublicensable, revocable limited license to run the Licensed Application on your Apple-branded product that runs the iPhone, iPad or iPod

ACCEPT

- 16. The patient needs to select an organization. If they allowed access to location, the app will know what state to display.
- 17. Select Alameda Health System

18. The patient can switch organizations in the future if you have charts at multiple organizations.









19. Log in with the user name and password from steps 3 & 4

AHS MyAlamedaHealthSystem Terms and Conditions

This web site ("Site") and related services are provided by Alameda Health System (AHS) to its patients is subject to compliance with the terms and conditions set forth below. Please read the following information carefully. Your continued use of this Site will indicate your agreement to be bound by the terms and conditions set forth below. If you do not agree to be bound by these terms and conditions, promptly exit this Site.

I. Privacy

Your privacy is of the utmost importance to us. Alamede Health System (AHS) will use your confidential medical information in order to provide your health care services. Alamede Health System will, at all times, maintain your confidential medical information is strict confidence and will not disclose any information regarding you to any unifiliated third party unless you authorite that person to receive your information or the information is permitted to add protoci your confidential medical information. All messages sent and received within Myalamedafeedbystem that contain medical information are subject to all state and federal laws governing the security and confidentially of medical records.



20. Accept the AHS MyAlamedaHealthsystem Terms and conditions

"MyChart" Would Like to Send You Notifications
Notifications may include alerts, sounds, and icon badges. These can be configured in Settings.

21. The patient should Allow Notifications

t Allow Allow

22. MyAlameda Health is open and can be used on the phone.



Doximity Tip Sheet

Because of Shelter-In-Place, we may have clinicians and other staff calling patients from their personal phones at home. This new workflow presents a problem as many clinicians and staff making calls from home do not want our patients having their personal home or cell phone numbers. They can use *67 to block their numbers however, we know this causes problems:

- Internal and external data supporting the fact that our patients are most likely to answer if they see their physician's office phone number on their phone rather than a "Unknown Callers".
- Many patients block "Unknown Callers".

Doximity has created a free app that is now available to clinicians and staff who have a medical center email address. The Doximity app includes a Dialer functionality which allows teams (medical assistants, administrators, nurses, etc) to call patients from their personal phones while displaying the office/hospital number on the patient's Caller ID.

How do you use the Doximity App?

Step 1: Create a Doximity Account (FREE). For more information: <u>https://www.doximity.com/about/faq</u> Step 2: Download the app by either going through the Doximity website or the App Store.





Step 3: Follow the instructions to set up the App.



Add Caller ID

Use a phone number that you would like patients to see when you call. Nicknames will not be displayed to patients.

AHS Call Center	
(510) 437-8500	
Save	
Cancel	

Step 4: The AHS phone number that will come pre-programed is not a working number. In case the patient misses your call, it is helpful for the number displayed to be that of the Call Center. Please add a Caller ID

1	2 ^BC	3 DEF
4	5 JKL	6 MN0
7 PORS	8 TUV	9 wxv2
	0	$\langle \times \rangle$

Documenting Phone Call

1. Select *Call Patient* at the center top of the page.



2. Select Outgoing Call.

4+:	Hyper	pace - Alamed	da Health	h System	- Product	Environment (PR	D) - HGH	PAIN MO	SMT CLIN	1 My Ope	n Encounter	a 🖴 O	- 0	×
Epic 🔹 📄 Patient Movem	nent 🎾 My Tasks 👘 Chart 🛔	Appts Reports	- 9r Enc	counter 🐛	Call Patient 🕅	Remind Me				Ð	O Per	rint - 🕻	Secure D+L	.og Out
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Patient Test														
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(no ACP docs)	Allergies BestPractice	contacts	1-		Culer				P 01			211L2 W		
Care Team: No PCP	Medication Review	Reason for	Call 🖉											
Coverage: None Allergies: Not on File	Problem List Neds & Orders	ne												
8/19 TELEPHONE No vital signs recorded for this encounter.	Documentation Routing Sign Encounter	Allergies/Co	ontraind	dication	ns /								,	
LAST 3YR		No Known Aller	rgies Ne	ever Update	ed (History)									
∿ No visits	N	Allergies on File												
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Start Review	+ ADD ORDER 😫											1	SIGN ENCOU	INTER

3. Fill in information for (*Relationship, Contact name, Phone*, and *Outcome*). Click *Accept*.

Q.R.	Hy	perspace - Alameda H	ealth System - Product	Environment (PR	D) - HGH PA	IN MGMT CLI	N 🖴 1 : My Open B	Encounters	2 0	۵ x
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Care Team: No PCP	Medication Review			Pharmacy						
Allergies: Not on File	Meds & Orders	Contact name:	θ							
	Documentation	Phone:	H							
8/19 TELEPHONE No vital signs recorded for	Routing	Outcome			10027250000					
this encounter.	Sign Encounter	o antonine.	P	No Answer/Busy	Left Message	Not Available	Missing or Invalid	Number		
LAST 3YR		Contact comments:								
9/ No visits										
A No results								Accent	Y Cancel	
CARE GAPS							-	Decebr	- Zaurigi	~
-	-									
Start Review	+ ADD ORDER 8								SIGN ENC	OUNTER

4. Under Reason for Call, free type "mychart."

Reason	Onset	Comment
mychart [Other]	7/9/2020	
Y Delete	Add to Proference Lie	

5. After you have attempted each of the patient's phone numbers, excluding emergency numbers, select *Documentation* from the menu on left.

	Hyp	perspace - Alam	eda Health Syste	em - Produce	Environment (PR	D) - HGH PA	AIN MGMT CLI	N 🖬 2 : My Open B	Encounters	= - 0	0 X	
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PT	Chart Re 8/19/2020 visit with Ge Triage Call @ Family	eview History erald Powell for Switch - III Refer	Allergies Problem Telephone ences 🛬 Dosage	ns Immunizations	Demographi	Select	Forms Educat	on Medic S	SnapShot	Call 💮 🎬	• • •	9 2
Patient Test Male, 3 y.o., 1/1/2017	TELEPHONE/REFILL ENCOUNTER	Contacts									14	^
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5a. Enter a short note explaining the reason for your call.

Example 1: "Explained benefits of MyChart enrollment. Patient requested emailed activation code and instructions."

Example 2. "Attempted to contact patient for MyChart outreach."

If the patient has no clinical questions or concerns, click SIGN ENCOUNTER. You have

completed documenting this encounter.

However, if the patient has questions about their medical condition or other clinical concerns, please continue to step 6a on the <u>next page</u>.

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****IMPORTANT INFORMATION****

If you are on the phone with a patient and they report any of the following medical conditions, ask them to call 9-11 immediately and document the information.

- Difficulty breathing, shortness of breath.
- Chest or upper abdominal pain or pressure.
- Changes in vision.
- Confusion or changes in mental status.
- Any sudden or severe pain.
- Fainting, sudden dizziness, weakness.

6. For non-emergency medical questions, you can either encourage patients with an active MyChart account to send a message to their health care provider or you can route the patient's chart to a medical assistant or care provider.

Routing medical questions: If a patient asks you a medical question please inform them that you are not a medical professional and that you will forward their question to a medical professional.

6a. Select *Routing* from the list of options on the left or scroll down from the *Documentation* field. Under *Recipient*, type *p* for "pool" and the partial name of the clinic you are supporting. You can type partial names to use the search function. This will allow you to forward the chart to whichever medical assistant or nurse is covering the clinic that particular day. Each clinic has a nurse/MA pool:

- Highland = P HGH Adult Medicine Clinic Nurse/MA
- Eastmont = P EWC Adult Medicine Clinic Nurse/MA
- Newark = P NWC Adult Medicine
- Pain Clinic = P HGH Pain Mgmt Clinic Nurse/MA
- Cardiology = P HGH Cardiology Clinic Nurse/MA
- Marina Wellness = P MWC Orthopedic Surgery Clinic Nurse/MA
- Neurosurgery = P HGH Neurosurgery Clinic Nurse/MA
- Dental = P EWC Dental Nurse/MA or P HGH Dental Clinic Nusre/MA

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6b. Select the appropriate clinic and click Accept.

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Start Review	+ ADD ORDER (E			SIGN ENCOUNTER

6c. In *Routing comment,* enter a brief note explaining the patient's clinical concern. Click *Send and Close Workspace*. Do not click *SIGN* ENCOUNTER, as the note will remain open until the recipient answers the patient's concern. You have now completed this patient's documentation in EPIC.

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Update Tracking Spreadsheet

A spreadsheet will be kept at a secure document management system. After completing your chart review for MyChart activation or completing your note after a phone call, please enter demographic information, the results of technological resources questions, and the patient's MyChart status into the spreadsheet. When you do not have information for a cell, please leave it blank.

To access the tracking sheet:

https://alamedahealthsystem.sharepoint.com/:x:/s/IS/ISPMOHome/TeleHealth/AmbulatoryTelehealth/EeuHDUEX5LFFmjTYuCrnrGwBPjb4jBalWZ4RKSSQ_jIUAg?e=5HB3qC

Additional Resources

Introductory Email Template English

Hello Ms. (patient last_name),

My name is (volunteer_name), and I am a volunteer with Alameda Health System.

I am writing to invite you to sign up for the Alameda Health System's electronic health record system through MyChart. This electronic communication tool is designed to assist you in accessing services like refilling medications, asking your doctor questions, reviewing visit notes and instructions, and looking at lab results.

The system requires you to download the MyChart app, and I am providing links for android and apple products.

Android: Mychart.

IPhone: MyChart.

You will also be receiving another email from Alameda Health System with the link to an activation code which you will need to complete the enrollment process.

Please feel free to email me with any questions you may have.

Sincerely,

(volunteer_name) Patient Tech Advocate Alameda Health System

This email is used for non-clinical purposes only and we are unable to answer medical questions. If you have medical questions or concerns please call 510-437-8500.

Introductory Email Template Spanish

Hola,

Durante el refugio en lugar, nos estamos acercando a pacientes que no están inscritos en MyChart y invitando a considerar la posibilidad de inscribirse. Esta aplicación le permitirá facilitar la comunicación con su proveedor (s) ver sus resultados de laboratorios, y enviar un mensaje seguro a sus médicos como algunos ejemplos de los beneficios de este programa.

Tambien, asiste en la comunicación con su doctor o doctores durante esta pandemia y reduce exponerlo o exponerla a covid-19.

Adjunto a este correo electronico se le ha enviado las instrucciones para descargar MyChart si está interesado (a).

También le he enviado separadamente por correo electrónico un código de activación a esta dirección de correo electrónico que necesitará para completar este proceso. Gracias!

Johanna Baltodano, CHOW, 2020

INSTRUCCIONES PARA INSCRIBIRSE EN MYCHART

1. Descargue la aplicación gratuita MyChart desde donde obtenga sus aplicaciones (iTu Google Play, etc.). La aplicación o icono MyChart se ve así:



Apple

Google Play

2. Una vez que haya descargado y abierto la Aplicación MyChart, verá lo siguiente Acuerdo de usuario, que deberá ACEPTAR:



 Aparecerá una ventana emergente preguntando si MyChart puede acceder a su ubicación. Porfavor, elija una opción







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		Sign Up	Close
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Co	ontraseña ". Aquí ingresarás en:	Step 2 of 3 All fields are required.	
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B.	Contraseña de tu elección (debe tener 8 caracteres o más y distingue entre mayúsculas y minúsculas)	Username may consist of a-z, 0-9, and , _ o Password	r @
C.	Reingrese la misma contraseña —	Eight characters or more; case sensitive Retype Password	
D.	Una pregunta de seguridad de su elección	Security Question	
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13. Ahora será redirigido a la pantalla de inicio de sesión. Por favor ingrese el nombre de usuario y . MED contraseña que acabas de elegir, y presiona el verde Botón "Iniciar sesión" -14. Verá My AlamedaHealthSystem Términos y condiciones ". Por favor acepte los términos y condiciones presionando el botón verde "Aceptar" en el fondo. 15. Verá un pequeño mensaje que dice que "MyChart "MyChart" Would Like to desea enviarle notificaciones push ". Por favor elija Send You Notifications ns may include alerts Allow or Don't Allow (permitir o no permitir) (Notificación push es un mensaje automatizado enviado por una aplicación a un usuario cuando la

aplicación no está abierta)



17. Si elige configurar un código de acceso, se le pedirá que lo ingrese y luego lo vuelva a ingresar. No hay un botón "enter". Solo tendrá que escribir los 4 dígitos y luego volver a escribirlo inmediatamente después.



NOTA: Si abre la página "Configuración de la cuenta", también puede activar en reconocimiento facial, en lugar de usar un código de acceso de 4 dígitos, si quisiera preferir. Esto se puede cambiar en cualquier momento, eligiendo los 3 puntos verticales en la esquina superior derecha de la página de inicio de MyChart y seleccionando "Configuración de la cuenta"



18. Una vez hecho esto, serás llevado a tu página de inicio de MyChart. Aparecerá una pequeña ventana informativa en la esquina superior izquierda de la pantalla. Cada vez que inicie una sesión, aparecerá esta ventana útil. Solo necesita presionar cualquiera de las opciones para obtener más información sobre lo que MyChart puede hacer, o puede tocar en cualquier otro lugar de la pantalla para que desaparezca (en cualquier lugar de la imagen para continuación que sea gris oscuro).



19. Voila! Ahora está en MyChart y puede aprovechar todo lo que tiene para ofrecer.

