

Digital Health Outreach Playbook



Table of Contents

1.	Project goals	3
2.	Which patient to contact	4
	a. In-basket method	4
	b. Departmental schedule method	5
3.	Gathering patient information before outreach attempt	8
4.	Contacting patient by phone	10
	a. Translator Services	10
	b. Technological resources questions	11
	c. Doximity Tip Sheet	17
5.	My Alameda Health Download App Tip Sheet	12
	a. Sending activation email	12
	b. Patient screen views	12
6.	Documenting phone call	18
	a. Routing patient chart	22
7.	Update Excel Spreadsheet	23
8.	Additional Resources	24
	a. Introductory email template – English	24
	b. Introductory email template – Spanish	25
	c. Patient MyChart instructions - Spanish	26

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.

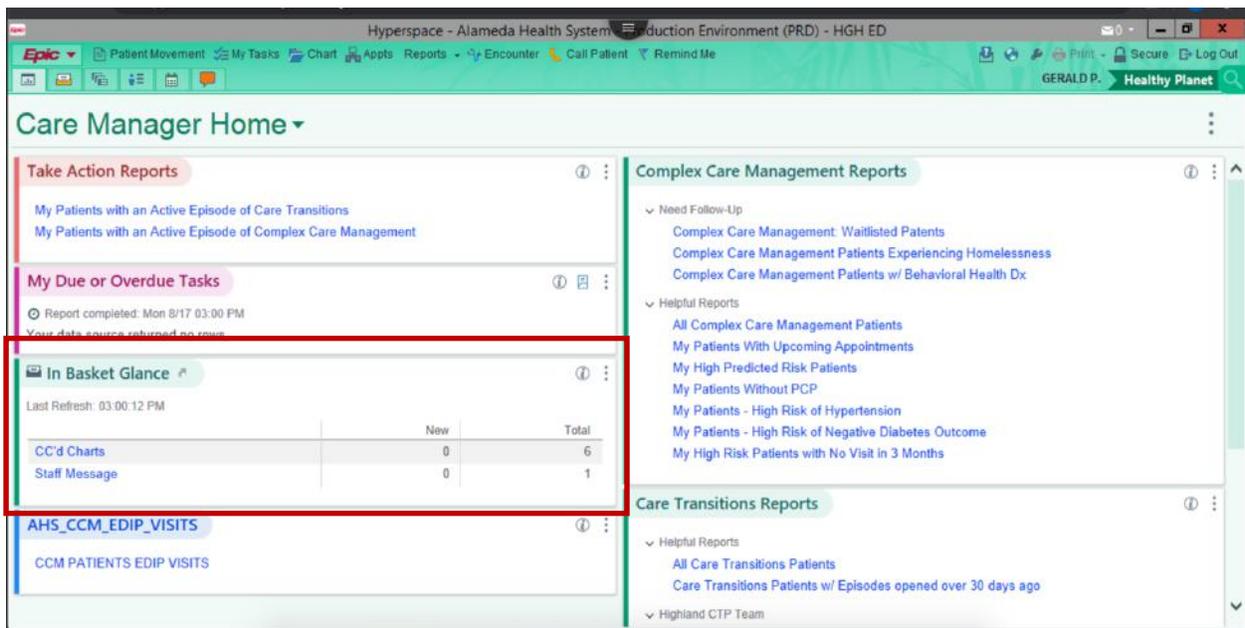
Which patients to contact?

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:

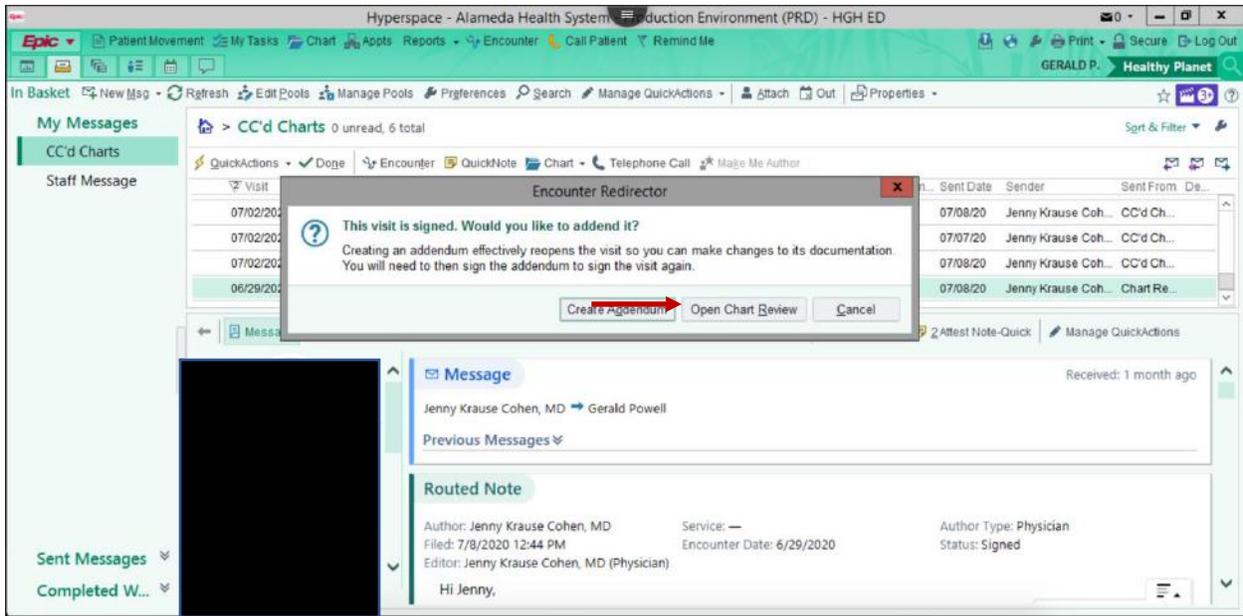
1. Upon opening EPIC, you will see information about charts sent to you in *In Basket Glance*. Click on *CC'd Charts*.



The screenshot shows the EPIC Care Manager Home interface. The 'In Basket Glance' section is highlighted with a red box and a red arrow pointing to it. The table below shows the number of new and total items in the basket.

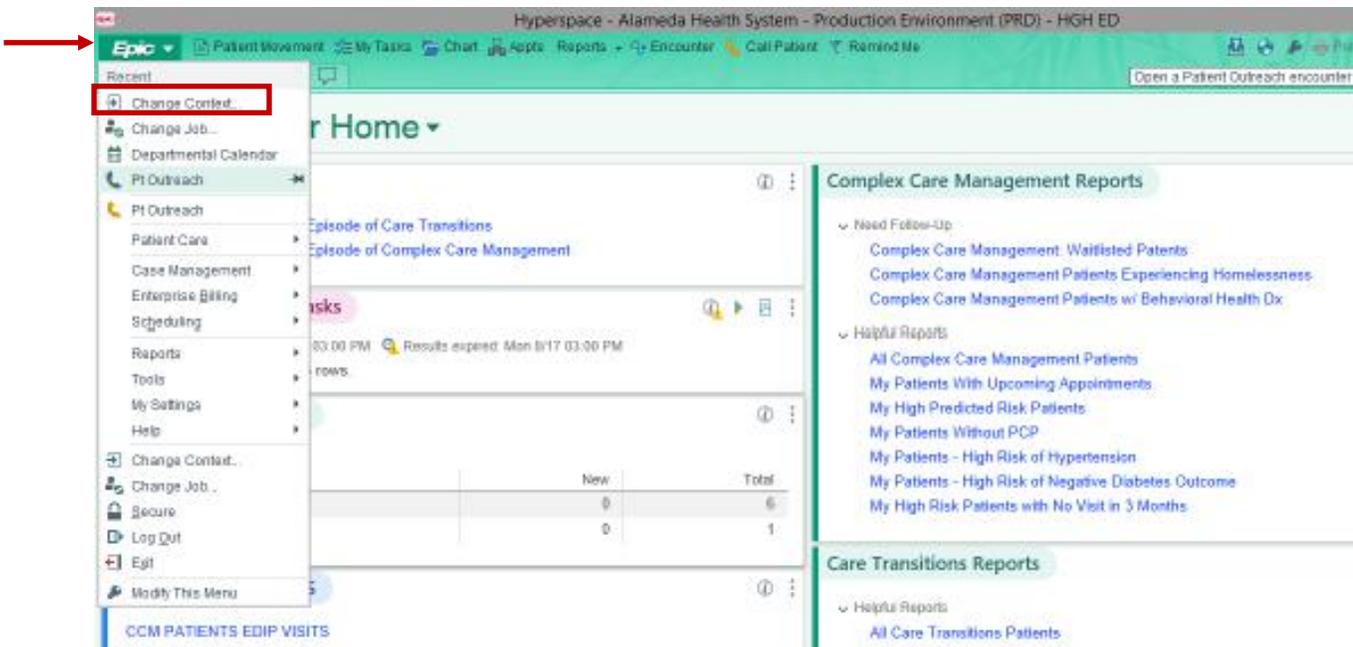
	New	Total
CC'd Charts	0	6
Staff Message	0	1

2. Click on the patient record and then select “Open Chart Review.” You are now ready to review the patient’s chart.

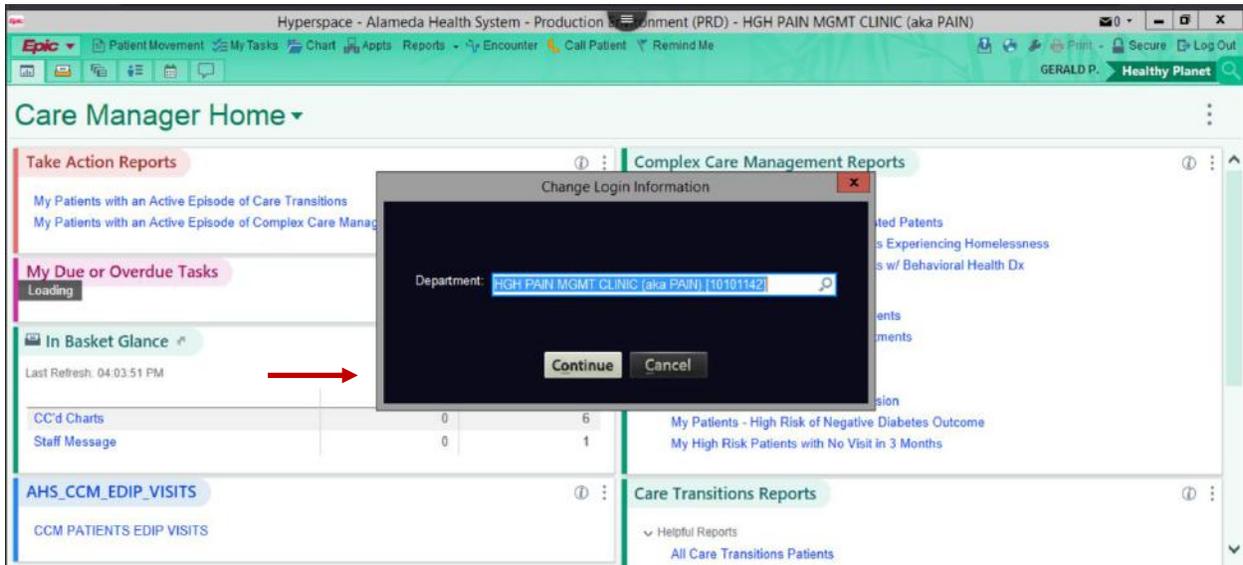


2. Departmental schedule method:

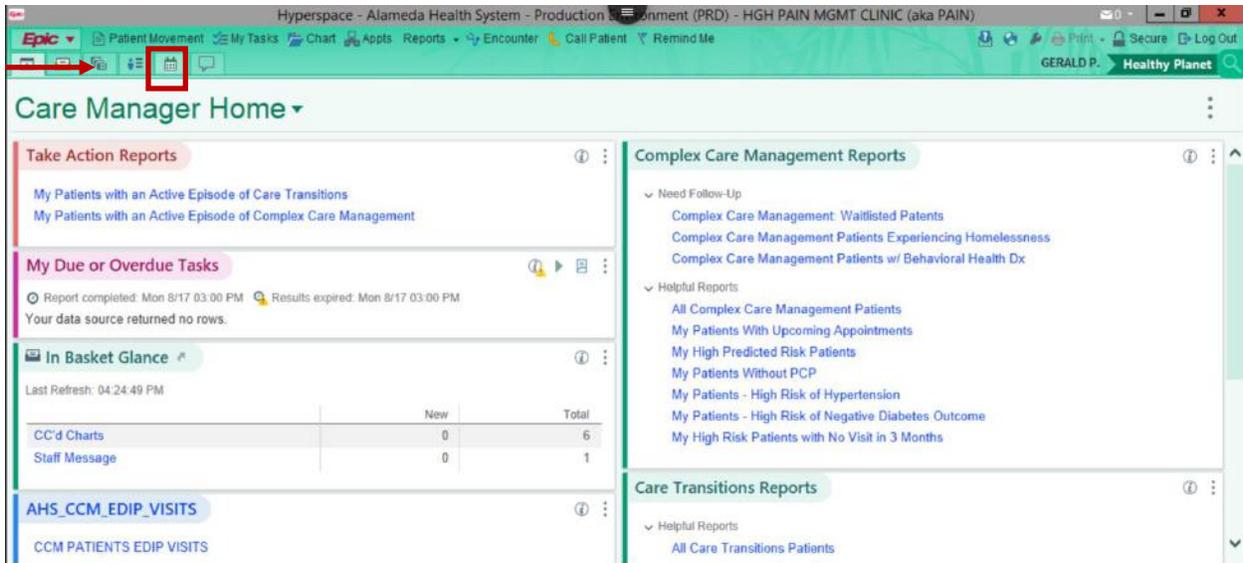
1. If necessary, change the clinical context to match the department of the clinician whose schedule you are looking-up.



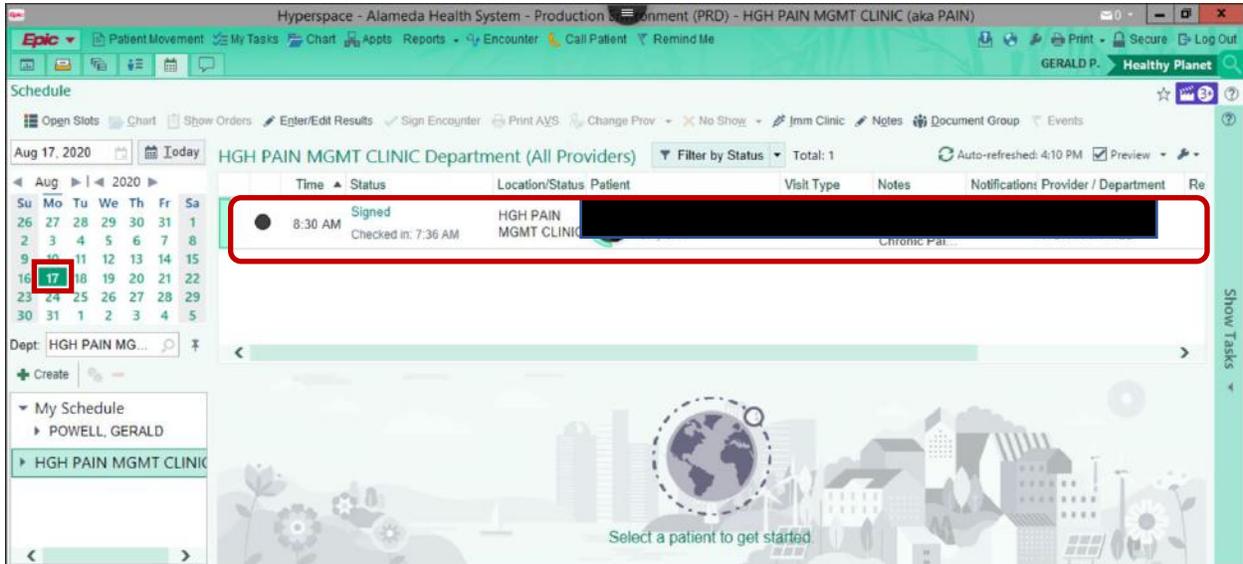
2. At *Change Login Information*, enter the appropriate department. You can enter partial department names and use the search function.



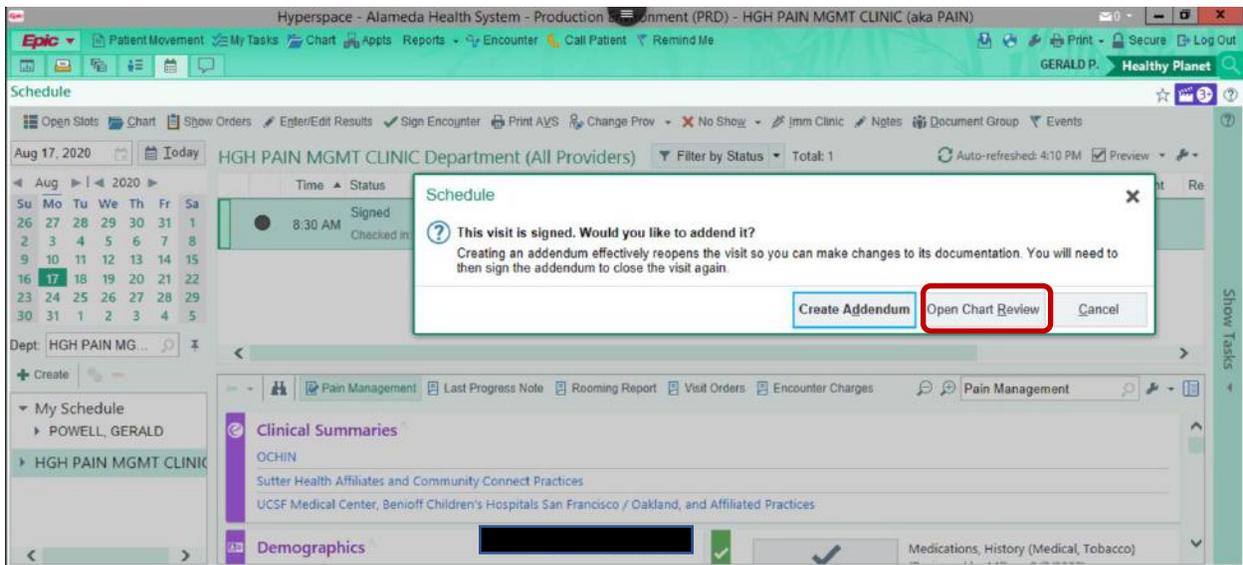
3. Click on the schedule icon. This will open a calendar that allows you to view the department schedule for a specific date.



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.



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



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.

The screenshot shows the Epic Demographics tab for a patient. The 'Contact Information' sub-tab is active. Fields are organized into sections: Personal Information (Name, SSN, Sex, Birth date, Patient status, Marital status, Ethnic group), Address (Address, City, State, ZIP, County, Country), and Contact Information (Number Type, Number, Email). Several fields are circled in red: the 'Demographics' tab label, the 'Contact Information' sub-tab label, the 'Sex' field (Male), the 'Birth date' field, the 'Ethnic group' field (Other Hispanic, Latino/a, or...), the 'Address' field, the 'City (or ZIP)' field (OAKLAND), the 'State' field (CA), the 'ZIP' field (94601), the 'Country' field (United States of America), and the 'Contact information' table with its 'Number' column.

Number Type	Number
1 Home Phone	[Redacted]
2 Work Phone	[Redacted]
3 Mobile	[Redacted]
No Email	

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.



INACTIVE



ACTIVE



PENDING



DECLINED

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

The screenshot shows the Epic EMR interface for a patient's Demographics. The 'Demographics' tab is selected in the top navigation bar. Underneath, the 'Clinical Information' sub-tab is also selected. In the 'Race' field, '1 Other' is selected. In the 'Preferred language' field, 'English' is selected. Other visible fields include 'Religion: Catholic', 'Branch of Service', 'Veteran? No, never served', and 'Written language: 1 Spanish'. The left sidebar shows patient status as 'Discharged' and 'CHIEF COMPLAINT' as 'Cough, Chest Pain'.

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 you 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

1. Verify patient date of birth
2. Ask technological resource questions below
3. Send activation code and introductory email. (see page)
4. Begin documentation process (see page)

If the answer is no

1. Ask technological resource questions below.
2. Begin documentation process. (see page)

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

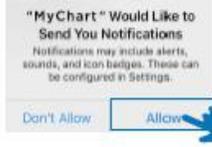
- Do you have a functioning computer at home?
- Do you have a smart phone?
- Do have an unlimited data plan?
- Do you have the internet at home?
- Are you interested in doing a video visit?

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 apps 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



- 1  noreply@alamedahealthsystem.org
- 2  Sign up for My Alameda Health now
- 3  
- 4   
- 5  
- 6  
- 7  
- 8  
- 9  
- 10  
- 11  
- 12  
- 13  
- 14  

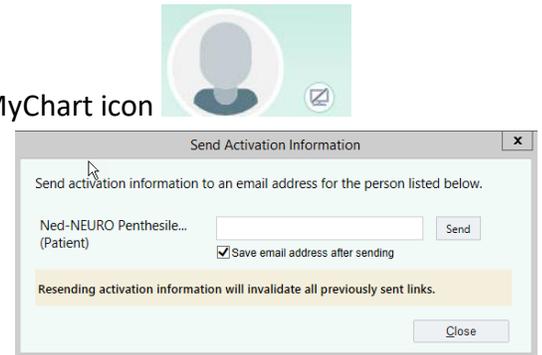


My Alameda Health Download App Tip Sheet

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.

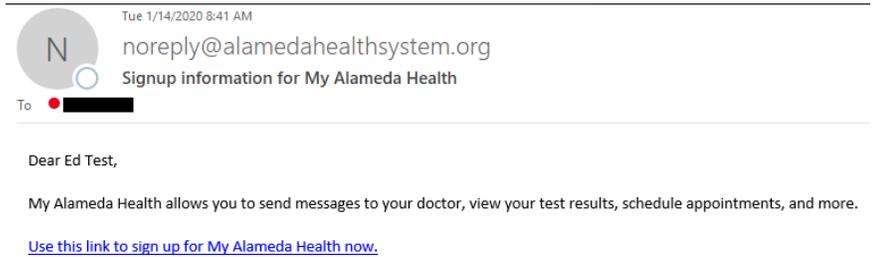
Send Email from Epic

1. From the patient Storyboard or Rooming, select the MyChart icon
2. Select the email address option
3. 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

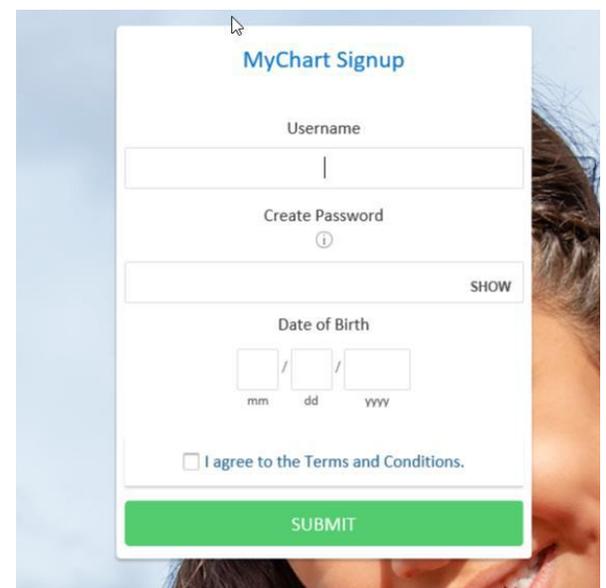


Ask the patient to follow these instructions

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



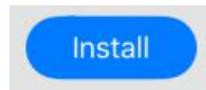
3. The patient will enter a User name,
4. The patient will enter a password
5. The patient will enter their date of birth
6. The patient will check the box agreeing to the terms and conditions.
7. Select submit



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

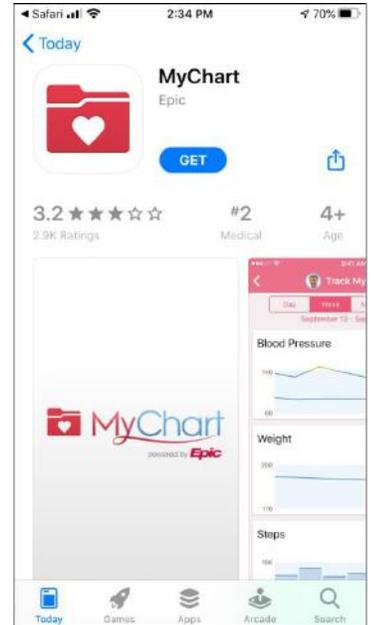
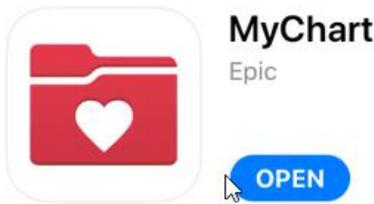


- 10. The App store or google play will open to the app to download
- 11. The patient needs to download/get the MyChart app by Epic

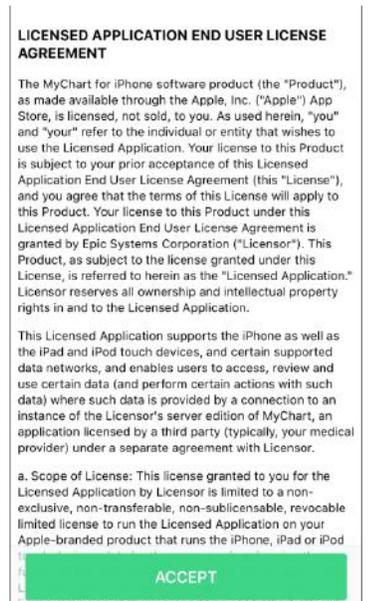
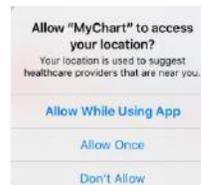


- 12. The patient will need to install the MyChart app

- 13. The patient needs to open the MyChart app



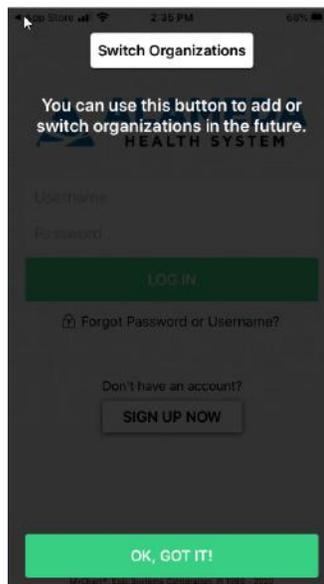
- 14. The patient needs to accept the Licensed application end user license agreement
- 15. The patient should allow MyChart to "access your location".

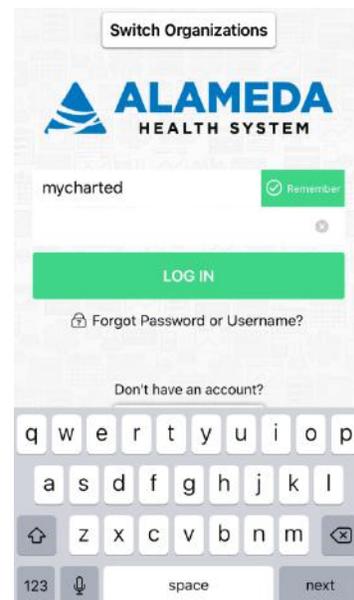
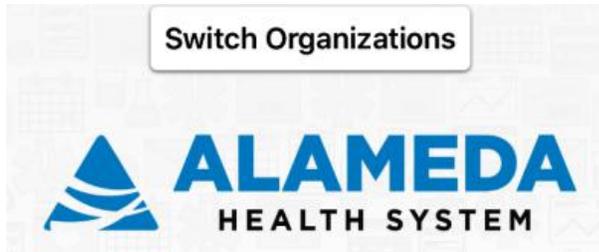


- 16. The patient needs to select an organization. If they allowed access to location, the app will know what state to display.
- 17. Select Alameda Health System



- 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. Alameda Health System (AHS) will use your confidential medical information in order to provide you health care services. Alameda Health System will, at all times, maintain your confidential medical information in strict confidence and will not disclose any information regarding you to any unaffiliated third party unless you authorize that person to receive your information or the information is permitted to be disclosed by law. Please review AHS Notices of Privacy Practices for a thorough description of how we gather, use and protect your confidential medical information. All messages sent and received within MyAlamedaHealthSystem that contain medical information are subject to all state and federal laws governing the security and confidentiality of medical records.



20. Accept the AHS MyAlamedaHealthsystem Terms and conditions

"MyChart" Would Like to Send You Notifications

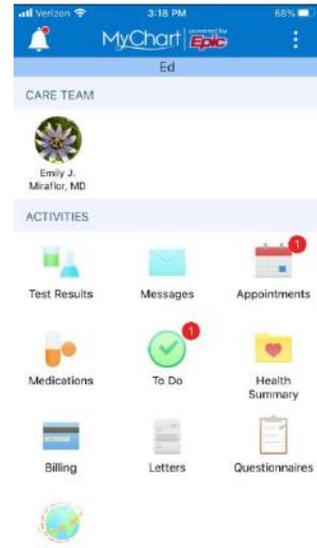
Notifications may include alerts, sounds, and icon badges. These can be configured in Settings.

Don't Allow

Allow

21. The patient should Allow Notifications

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:

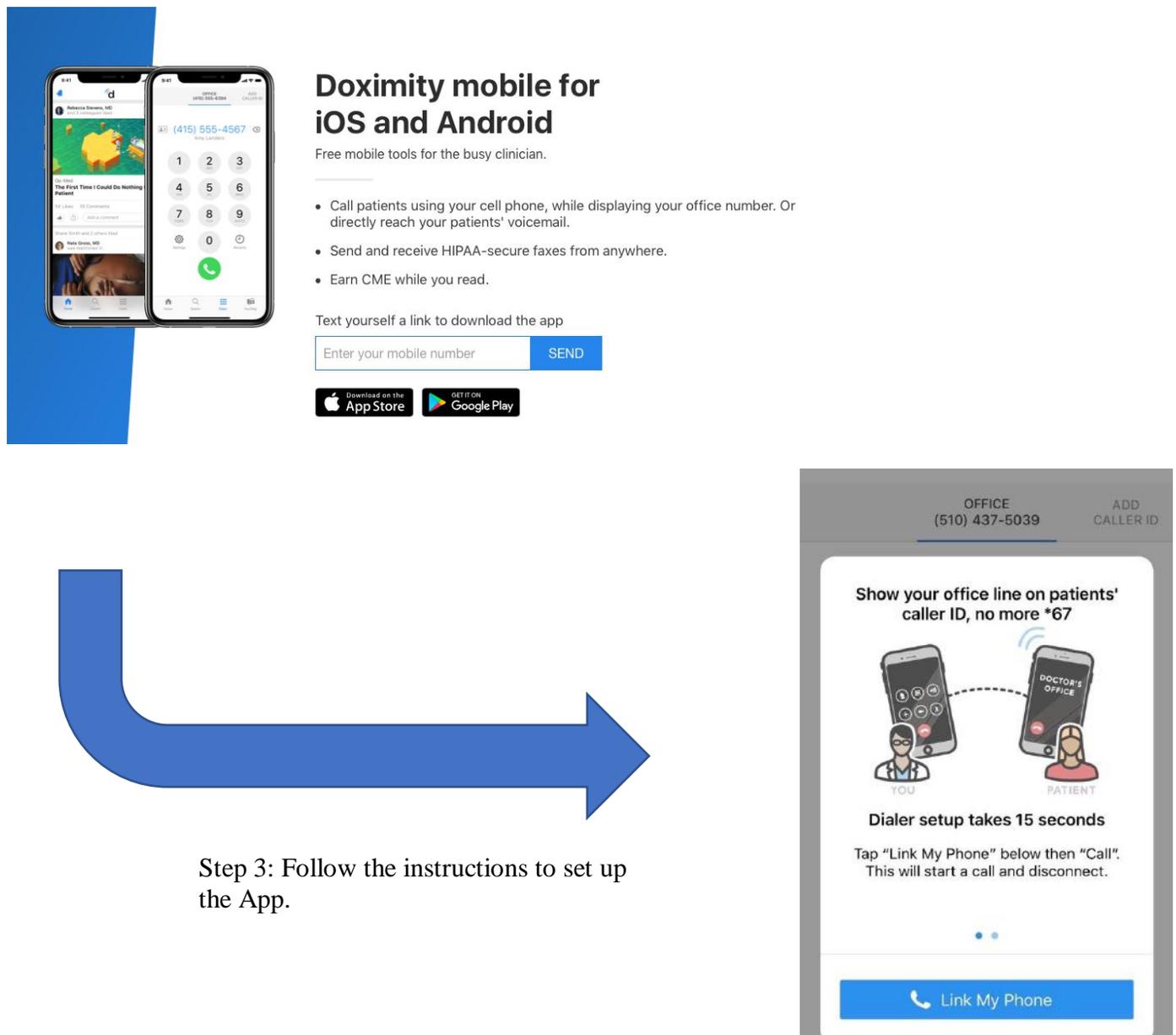
- Internal and external data supporting the fact that our patients are most likely to answer if they see their physician's office phone number on their phone rather than a "Unknown Callers".
- Many patients block "Unknown Callers".

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: <https://www.doximity.com/about/faq>

Step 2: Download the app by either going through the Doximity website or the App Store.



Doximity mobile for iOS and Android

Free mobile tools for the busy clinician.

- Call patients using your cell phone, while displaying your office number. Or directly reach your patients' voicemail.
- Send and receive HIPAA-secure faxes from anywhere.
- Earn CME while you read.

Text yourself a link to download the app

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

OFFICE (510) 437-5039 ADD CALLER ID

Show your office line on patients' caller ID, no more *67

YOU PATIENT

Dialer setup takes 15 seconds

Tap "Link My Phone" below then "Call". This will start a call and disconnect.

2:00



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

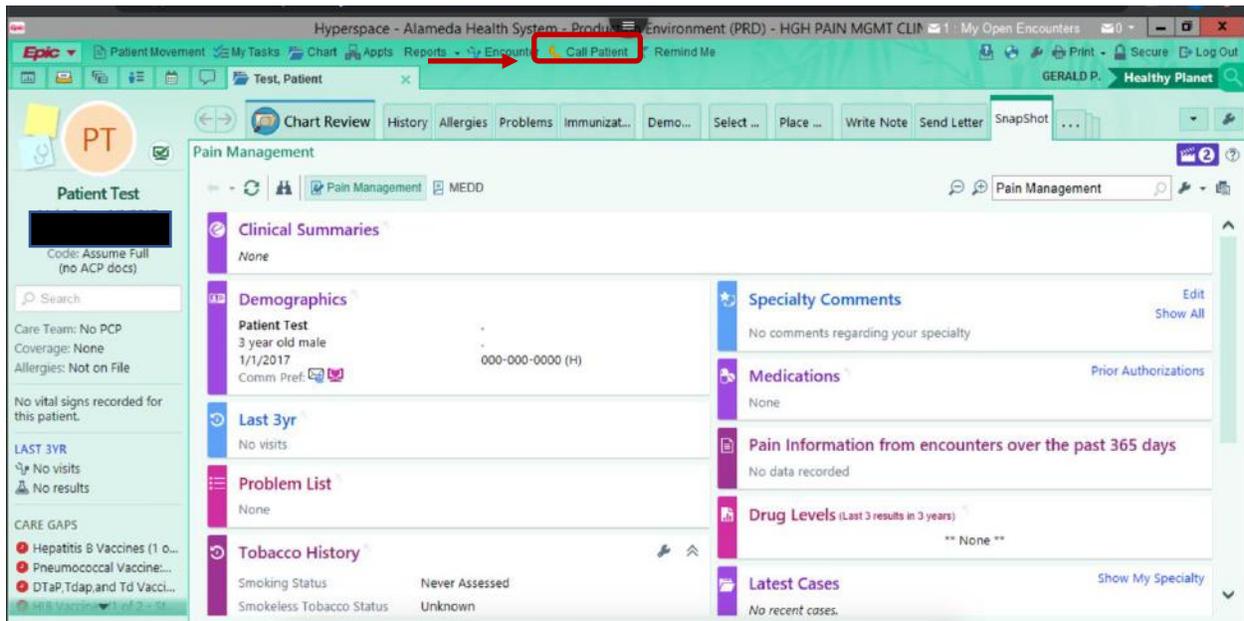
Cancel

Step 4: The AHS phone number that will come pre-programmed 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

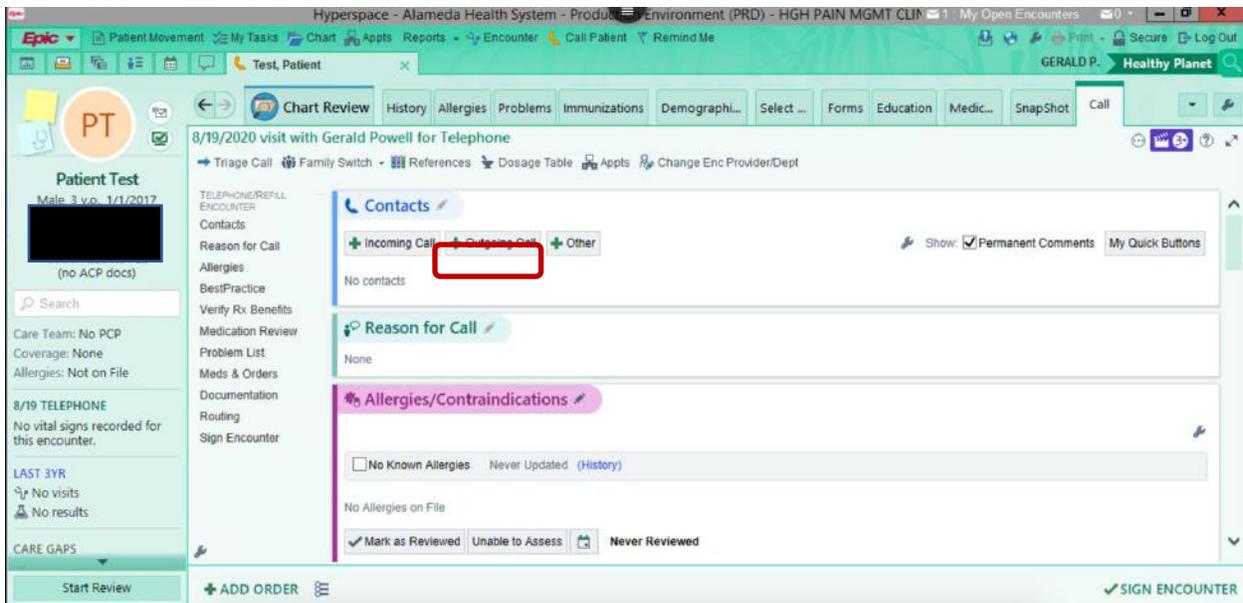


Documenting Phone Call

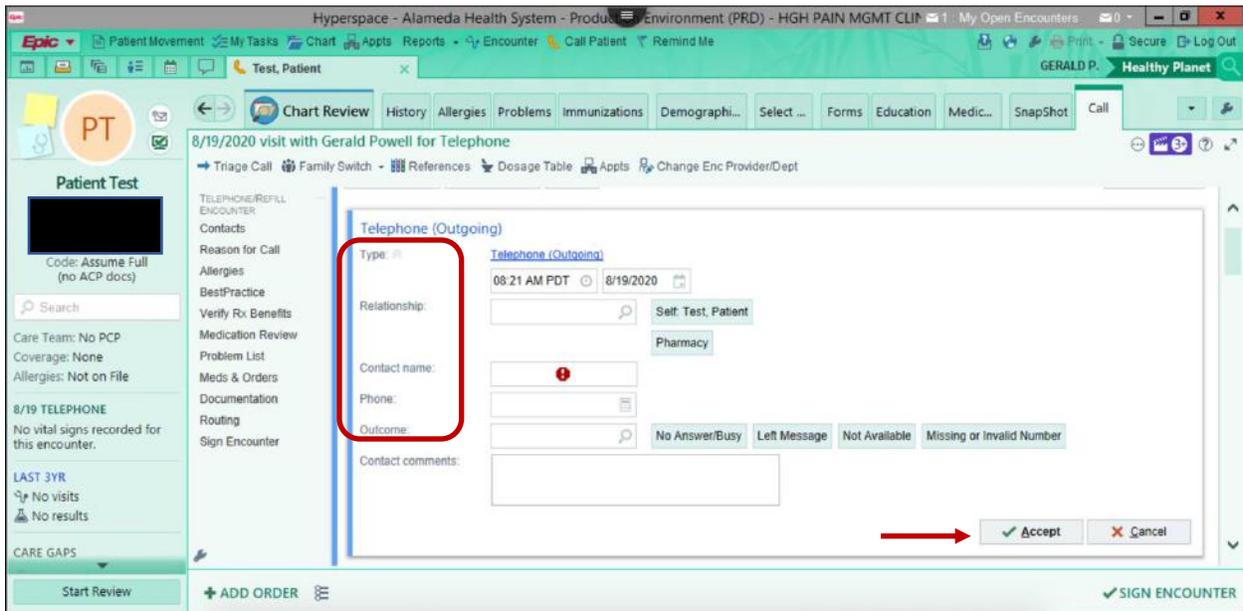
1. Select *Call Patient* at the center top of the page.



2. Select *Outgoing Call*.



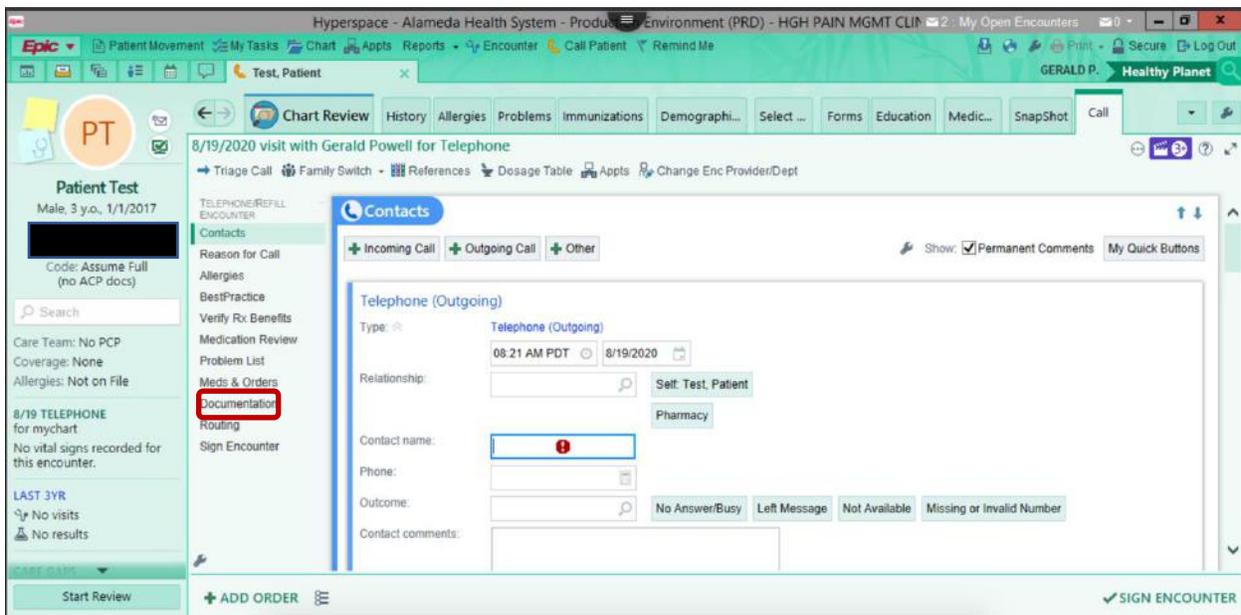
3. Fill in information for (*Relationship, Contact name, Phone, and Outcome*). Click *Accept*.



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

Reason for Call		
Reason	Onset	Comment
mychart [Other]	7/9/2020	
<div style="display: flex; justify-content: space-between; margin-top: 10px;"> ✕ Delete Add to Preference List </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> ⏪ Restore ✓ Close </div>		

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



5a. Enter a short note explaining the reason for your call.

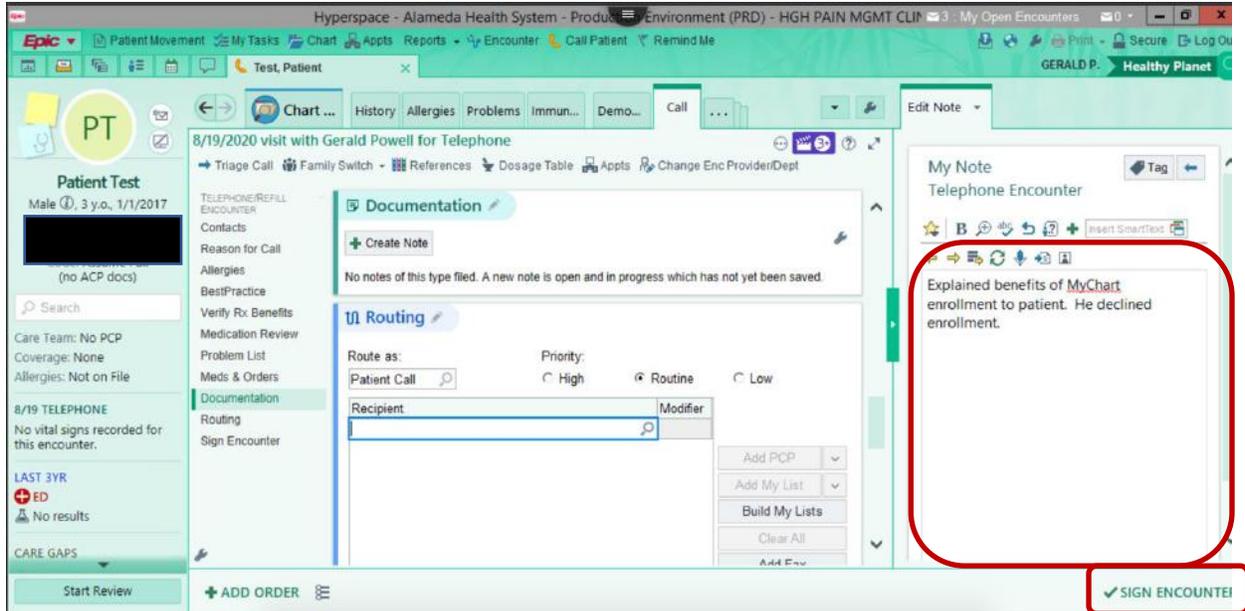
Example 1: “Explained benefits of MyChart enrollment. Patient requested emailed activation code and instructions.”

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 [next page](#).



****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.

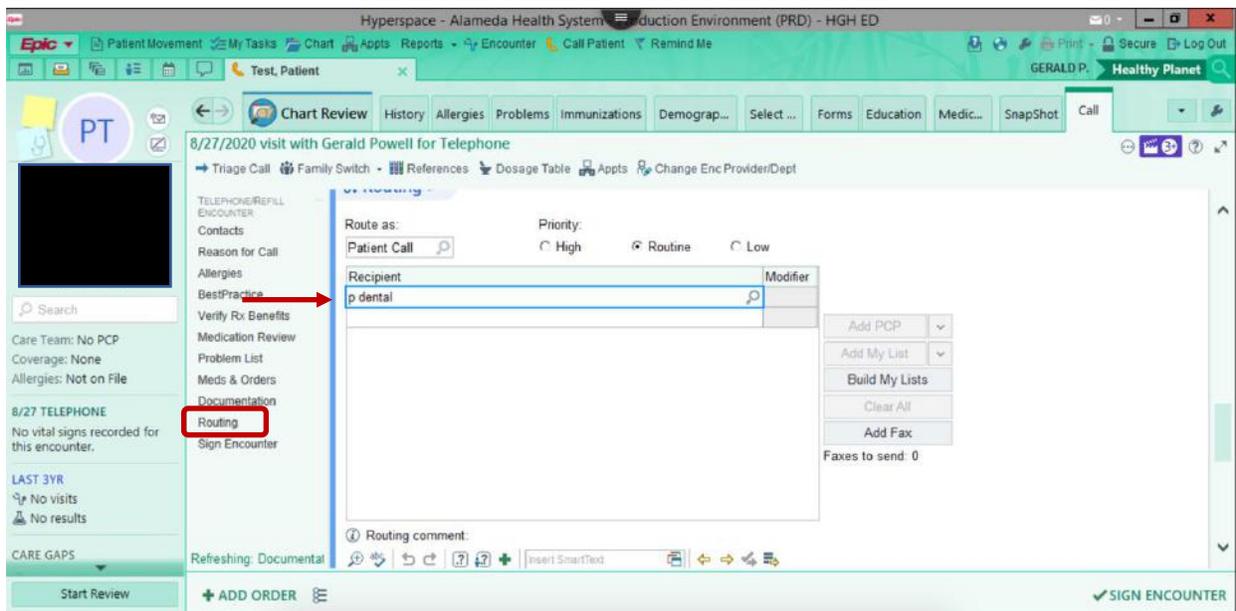
- Difficulty breathing, shortness of breath.
- Chest or upper abdominal pain or pressure.
- Fainting, sudden dizziness, weakness.
- Changes in vision.
- Confusion or changes in mental status.
- Any sudden or severe pain.

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.

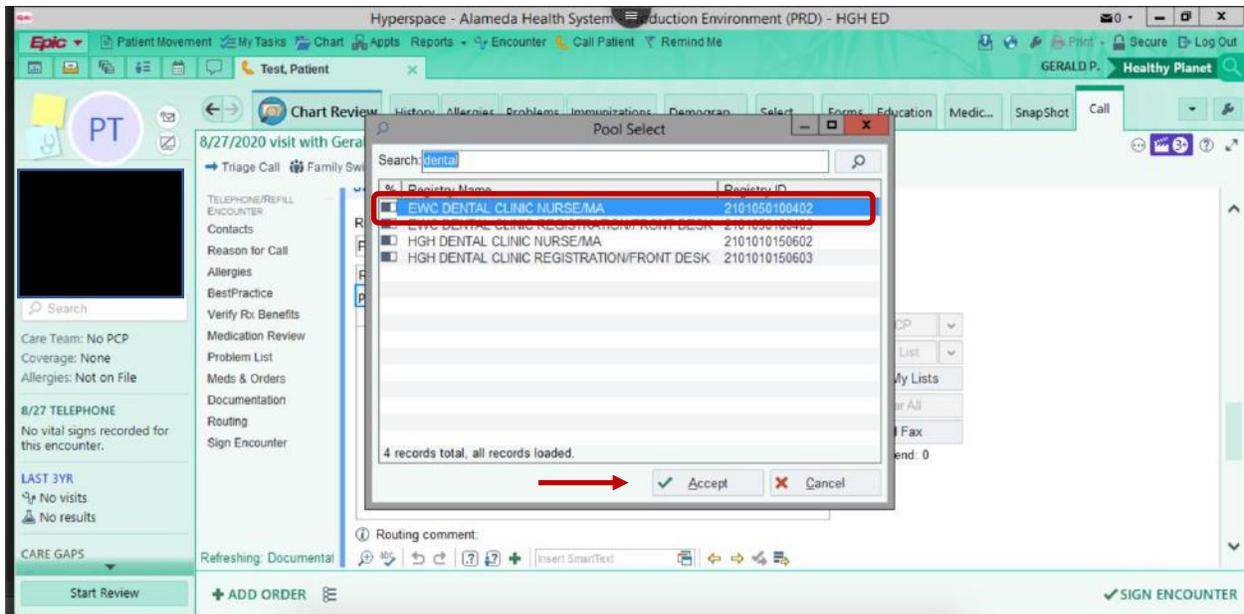
Routing medical questions: If a patient asks you a medical question please inform them that you are not a medical professional and that you will forward their question to a medical professional.

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:

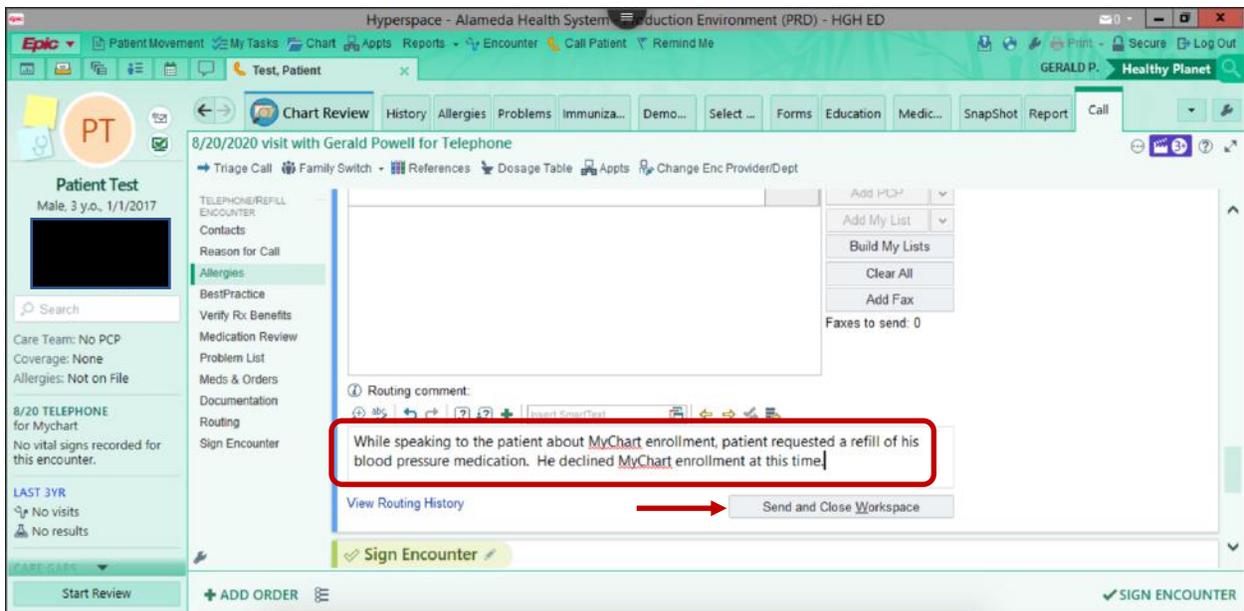
- Highland = P HGH Adult Medicine Clinic Nurse/MA
- Eastmont = P EWC Adult Medicine Clinic Nurse/MA
- Newark = P NWC Adult Medicine
- Pain Clinic = P HGH Pain Mgmt Clinic Nurse/MA
- Cardiology = P HGH Cardiology Clinic Nurse/MA
- Marina Wellness = P MWC Orthopedic Surgery Clinic Nurse/MA
- Neurosurgery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



6b. Select the appropriate clinic and click *Accept*.



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.



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/EeuHDUEX5LFFmjTYuCrnrGwBPjb4jBaIWZ4RKSSQ_jlUAg?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.

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

Adjunto a este correo electrónico 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

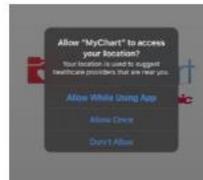


Google Play

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



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



4. Luego, tendrá que seleccionar ALAMEDA HEALTH SYSTEM de la lista de hospitales participantes:



5. Luego aparecerá una página de consejos que le informará que puede cambiar de organización si alguna vez quiere cambiar de médico proveedores en el futuro (y ese proveedor / hospital usa MyChart). Presione el verde, "OK, lo tengo!" botón:



6. Esto lo llevará a la pantalla de inicio de sesión. Necesitará para elegir el botón "Registrarse ahora" en la parte inferior.



7. Luego, un empleado de Highland generará un código de para usted. HGH: Abre su tabla en Epic. En la parte superior de la barra lateral, haga clic en el icono MyChart a la derecha de la imagen del paciente:



activación

8. Genera el código de activación

9. Verá la página "Identifíquese". Aquí, debe ingresar lo siguiente:

- A. Código de activación recién generado
- B. Últimos 4 dígitos de su número de Seguro Social (ingrese cuatro ceros, si no tiene SS #, ej.: 0000)
- C. Su fecha de nacimiento en formato de MM /DD/AAAA

Luego, presione el botón verde "Siguiente"

10. A continuación, pasará al "Nombre de usuario & Contraseña ". Aquí ingresarás en:

- A. Nombre de usuario de su elección (puede consistir en A-Z, 0-9, . _ @)
 - B. Contraseña de tu elección (debe tener 8 caracteres o más y distingue entre mayúsculas y minúsculas)
 - C. Reingrese la misma contraseña
 - D. Una pregunta de seguridad de su elección (Ej: color favorito, mascota, automóvil, apellido de soltera de la madre, etc.)
Nota: esto lo ayudará a restablecer su información de inicio de sesión en caso de que alguna vez quedar bloqueado
 - E. La respuesta a su pregunta de seguridad
- Luego, presione el botón verde "Siguiente"

11:41 Sign Up Close

Choose a Username & Password

Step 2 of 3
All fields are required.
Please choose your MyChart Username and password.

MyChart Username
Username may consist of a-z, 0-9, . _ or @

Password
Eight characters or more; case sensitive

Retype Password

Security Question

Secret Answer
Cannot include your password

NEXT

11. La siguiente pantalla será la pantalla "Notificación por correo electrónico".

- Elija (presionando) Sí o No
 - Dirección de correo electrónico
 - y luego vuelva a ingresarla:
- Luego, debe presionar el botón verde "Iniciar sesión"

11:41 Sign Up Close

E-mail Notifications

Step 3 of 3

Enable E-mail Notifications?
When new information is available (such as test results or messages), we will send a notification message to your Internet e-mail address.

Yes No

E-mail Address
Example: ohis@company.com

Retype E-mail Address

SIGN IN

12. Aquí, verá una pequeña pantalla de "Bienvenida" que indica que ahora puede iniciar sesión. Presione el botón "OK":

Welcome!
You can now log in with your new Username and Password.

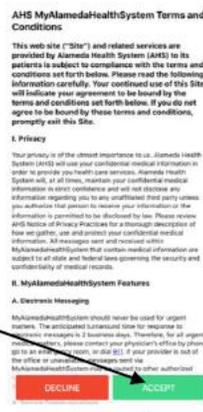
OK

13. Ahora será redirigido a la pantalla de inicio de sesión. Por favor ingrese el nombre de usuario y contraseña que acabas de elegir, y presiona el verde

Botón "Iniciar sesión"

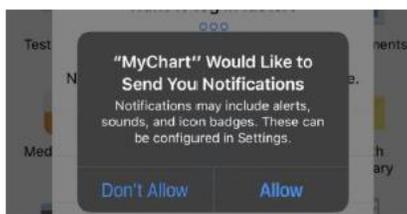


14. Verá My AlamedaHealthSystem Términos y condiciones ". Por favor acepte los términos y condiciones presionando el botón verde "Aceptar" en el fondo.



15. Verá un pequeño mensaje que dice que "MyChart desea enviarle notificaciones push ". Por favor elija Allow or Don't Allow (permitir o no permitir)

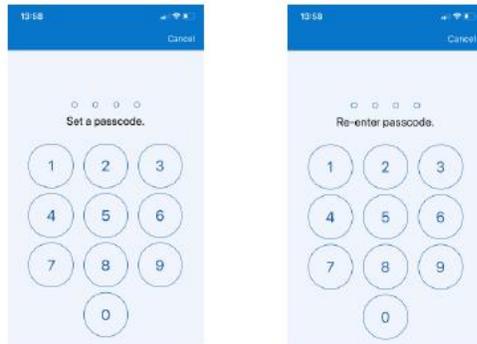
(Notificación push es un mensaje automatizado enviado por una aplicación a un usuario cuando la aplicación no está abierta)



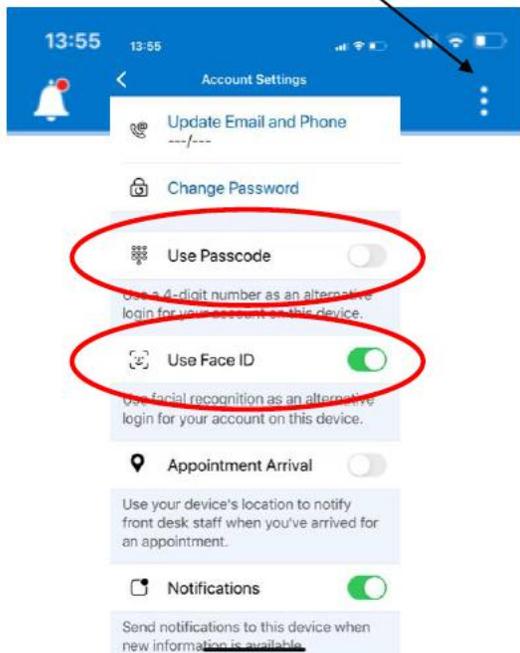
16. A continuación, aparecerá una ventana útil que le dará la opción de crear un pin de 4 dígitos, que le permitirá iniciar la sesión más rápido en el futuro. Si estás interesado (y te recomendamos esta opción para ahorrarle tiempo en el futuro), elija "Configurar ahora"



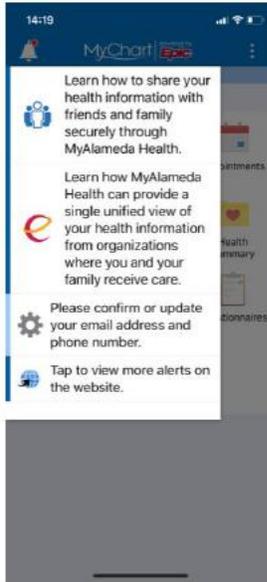
17. Si elige configurar un código de acceso, se le pedirá que lo ingrese y luego lo vuelva a ingresar. No hay un botón "enter". Solo tendrá que escribir los 4 dígitos y luego volver a escribirlo inmediatamente después.



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.

