

Case Study Profile and Overview

Follow the prompts to complete the section below. This information will make up a very brief profile on your project.

Organization Profile

Organization Name	West County Health Centers
Organization Website	http://www.wchealth.org/
Organization Description	West County Health Centers serve a primarily poor and rural population with over 80% of our patients are living at or below the federal poverty level and most living in small, isolated communities throughout western Sonoma County.
About the Region	Rural, Primary Care, Addiction Support Services, Homeless Services, HIV/AIDS Services.
Patient population, size & demographics	Patient Population is ~ 12,838 4 primary care locations with integrated behavioral health services. 1 Wellness Center 1 Dental Clinic 1 Teen Clinic

Solution/Project Profile

Solution/Project Title	Online Appointment Booking using Healow Open Access
Issue	Staff today appointment scheduling is an inefficient and time-consuming processes and limits access for patients whose only option is to call or walk in during office hours to book their appointments. Using online appointment scheduling healthcare organizations can save time, money and empower patients to self-advocate by giving them the convenience of online booking.
Stage	Running Pilot: In the hands of staff for trainings or testing. Includes Evaluation/Measurement.

Have questions? [Contact Angela.](#)

Financial Investment	<p>What's the current financial investment in the project</p> <ul style="list-style-type: none"> • \$\$\$: > \$5,000 <p>\$5075.46 for 6 months for All providers, including BH. \$39 per FTE per Month. 39 x 21.69 x 6 = \$5075.46</p>
In-Kind Investment	<p>1 FTE that dedicated 120 hours to this project.</p> <p>In addition, we had monthly 1-hour project team meetings with the following individuals:</p> <ul style="list-style-type: none"> • Innovation Program Manager • Director of Operations • IT Project Manager • Agency Trainer
CCI Investment	Tech Hub \$5,000 yearly stipend to pilot.
Partners	eClinicalWorks – Healow (Patient Engagement Team) KLH Consulting

Project Timeline

Please share a brief outline of your project milestones or actions at each month. Focus on milestones related to the project, not the CCI benchmarks. Use short phrases (1-10 words).

Date (Month or Quarter)	Milestone (Short Phrases)
January - February 2019	<p><i>Product Demo</i></p> <ul style="list-style-type: none"> • <i>Project leads vet product</i> • <i>Pitch idea to executive champion</i>
March 2019	<p><i>Project Team</i></p> <ul style="list-style-type: none"> • <i>Establish a project team</i> • <i>Establish reoccurring meetings</i>
April 2019	<p><i>Project Charter</i></p> <ul style="list-style-type: none"> • <i>Create AIM Statement</i> • <i>Establish stakeholders</i> • <i>Develop deliverables/milestones</i> • <i>Identify risks</i> • <i>Establish pilot metrics</i>
May 2019	<p><i>eClinicalWorks Configuration & Integration</i></p> <ul style="list-style-type: none"> • <i>Product Activation</i> • <i>Check Web Portal Tasks Schedule</i> • <i>EBO Reporting Patch Deployment</i> • <i>Healow Desktop Widget download & testing</i> <ul style="list-style-type: none"> ○ <i>Enable Item key for Health agent integration</i>

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	<ul style="list-style-type: none"> ○ Connect with KLH Consulting for deployment to specific workstations ○ Portal Widget Testing ○ Healow Widget Testing <p>Buy-in</p> <ul style="list-style-type: none"> • Care Team Pitch & Overview
June 2019	<p>Care Team & Call Center Training</p> <ul style="list-style-type: none"> • Training on how to accept appointments (reservations) • Training on how to use visit types <p>Patient Communication draft/finalization</p> <p>Pilot #1 Medication Refill Appointment Only</p> <ul style="list-style-type: none"> • List of patients due for a medication check/review <p>Pilot #2 Open Access</p> <ul style="list-style-type: none"> • Open Access recall list
July 2019	<p>Patient Communication sent out manually Pilot #2</p> <p>Patient Communication sent via Custom Campaign Pilot #1</p> <p>First appointment gets booked within 48 business hours!</p> <p>Check in with staff about workflow</p> <ul style="list-style-type: none"> • Are the initial workflows working? • What Changes should be made? <p>Decision for secondary contact of Patients made</p> <ul style="list-style-type: none"> • Manually and Automatically (Custom Campaign) sent Patient Communication <p>Project Wrap Up & Case Study Review</p>

Impact Metrics

List 3-5 key impact measures you tracked as part of solution implementation, including how many end users participated in your experiment.

Metric 1	<p>Number of patients in our pilot?</p> <p>Pilot #1 Medication Recall</p> <ul style="list-style-type: none"> • x = 43 patients <p>Pilot #2 Open Access</p> <ul style="list-style-type: none"> • x = 35 patients
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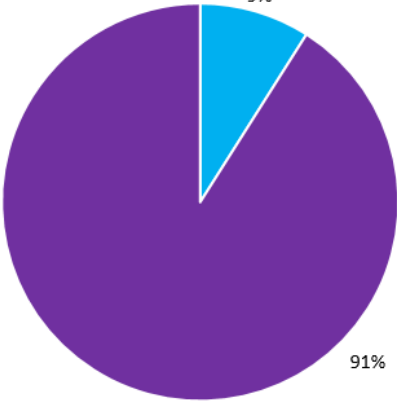
Metric 2

Combination of both pilots
• **x = 78 patients**

How many patients utilized online appointment booking?

Pilot #1 | Medication Recall
x = 4 patients or 9%

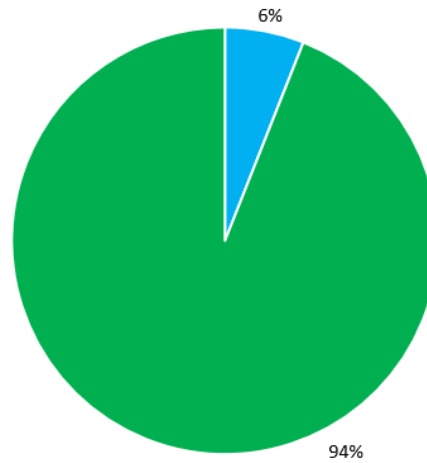
The percentage of patients that scheduled an appointment online.



Category	Percentage
Did not schedule online	91%
Scheduled online	9%

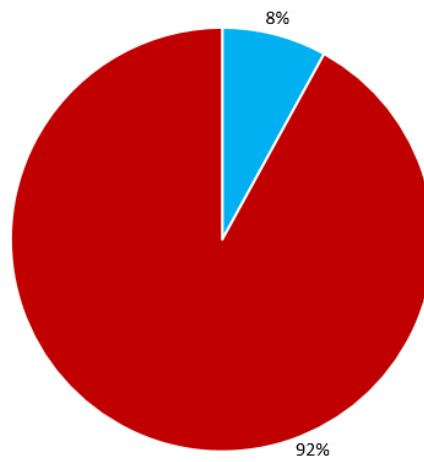
Pilot #2 | Open Access
x = 2 patients or 6%

The percentage of patients that scheduled an appointment online.



*Combination of both pilots
x = 6 patients or 8%*

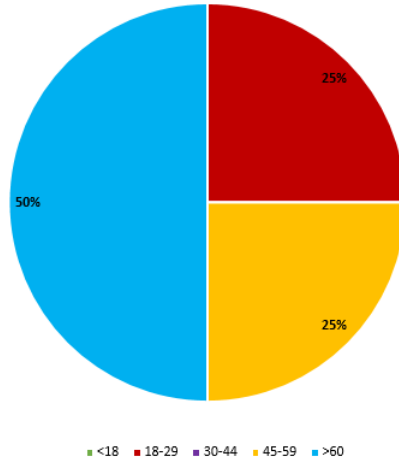
The percentage of patients that scheduled an online appointment.



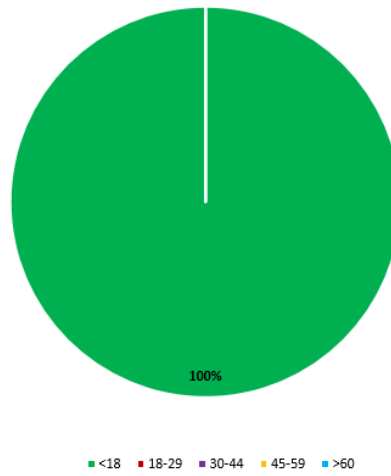
Metric 3

Age Distribution of the patients that booked online.

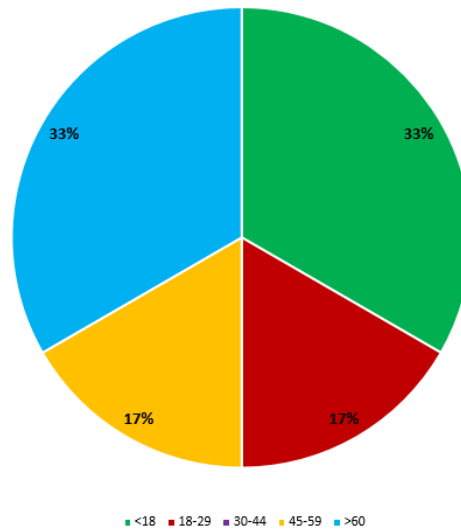
*Pilot #1 | Medication Recall
Ages 29-72*



*Pilot #2 | Open Access Recall
Ages 7-71*



*Combination of both pilots
Age 7 - 72*



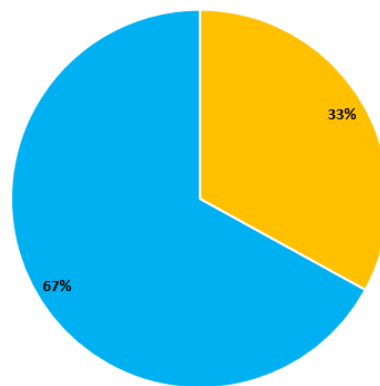
Metric 4

Number of patients that were contacted via text, email, portal or letter that opted to schedule their appointment by calling our call center.

Pilot #1 | Medication Recall

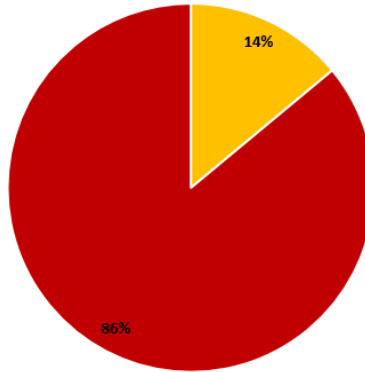
x = 14 or 33%

The percentage of patients that were contacted via text, email, portal or letter that opted to schedule their appointment by calling our call center



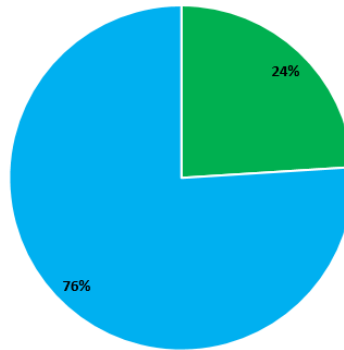
Pilot #2 | Open Access Recall
x=5 or 14%

The percentage of patients that were contacted via text, email, portal or letter that opted to schedule their appointment by calling our call center.



Combination of both pilots
x = 19 or 24%

The percentage of patients that were contacted via text, email, portal or letter that opted to schedule their appointment by calling our call center.



Metric 5

Of the patients that booked online in both pilots, what was the percentage of patients that showed up for their appointment?

X = 100%

Project Point Person

Provide contact information for the person that readers can reach out to if they want to learn more about the project. This will be shared on the CCI website.

Name	Kathleen Figoni
Title	Innovation Program Manager
Email	kfigoni@wchealth.org

Project Narrative Responses

The Process

Respond to the questions below in a narrative form. We want to hear how your team thought through the problem and project – successes, roadblocks, etc. **Don't hesitate to explain processes and details in depth, especially if the problem or solution is complicated. This will help the copy editor (a lay person) understand and minimize back and forth with you.**

- 1. Who are your end users (e.g., patients, clients, staff, providers)?** Describe them and their experience of the problem.

West County Health Centers serves patients across the demographic and socio-economic spectrum and provides traditional primary and obstetric care services in addition to homeless services, addiction support, behavioral and psychiatric services, teen health, wellness and dental services. As the only health care organization in most of our service area, access to these services and related support is a critical need for individuals and families.

Transportation insecurity, poverty, chronic homelessness and limited family or community resources provide a significant barrier to healthcare access and indirectly affect patient's health with lack of reliable access to food, education, employment, socialization and other community resources. With extensive economic, health and social barriers, access to quality affordable health care is difficult when our patients are trying to meet their basic needs. Because basic needs become one's priority our patients do not have the time to call or even walk into one of our clinics to schedule an appointment. With that said, considerable staff resource is allocated to identifying and supporting social needs that affect the health of our patients and communities often requiring significant effort and creative problem solving on the behalf of our patients. When staff work tirelessly to get our patients access to care and patients are not able to self-schedule their appointments we see in an increase in no-show and late cancel appointments and decrease in patient engagement ultimately leading to poor health outcomes.

- 2. Articulate the problem:** What needs weren't being met? How did you know your problem was a problem?

Today, people are busier and better connected than ever and while some may perceive that our patient population may not have access to mobile devices this perception is misconstrued. Our patients now more than ever use their mobile devices to follow up on job employment opportunities, housing leads, keep in touch with public assistance agencies and more. With technology at their fingertips and with it being a structural part of American Society, our patients have become accustomed to completing their basic errands online.

Have questions? [Contact Angela.](#)

In our current state, the patient-booking process can sometimes be difficult for both staff and patients alike. Scheduling appointments via phone is a time-consuming task which can create extended wait times when call volume is high frustrating patients and stressing staff. Right now, as we operate patients can only reach us by phone during our business hours from: 9:00 – 5:00PM with phones off from 12:00 – 1:30PM which adheres to the tradition of closing medical practices to accommodate staff lunches and dedicated work-time.

Alternatives to calling include: walk in appointment booking at a primary care location, or request an appointment through a portal message which requires a call back from a staff member. This combined with our traditional communication set up (phone operation hours) is not conducive for the average working patient who struggles to find time to reach us during business hours.

When patients can book online appointments, staff can be directed to other tasks and truly move beyond our clinic walls and address upstream factors impacting health at an individual and population level. When patients can self-schedule their healthcare appointments quickly and conveniently without worry this ultimately removes access barriers and promotes comprehensive quality care.

3. What did you hope to learn? What benchmarks did you need to meet to continue the project after the pilot? *3-5 sentences on your assumptions before implementation and realizations after implementation.*

Our pilot team conducted two small-scale pilot tests. We knew from past technology implementations like Hitch Health and Video Visits that testing out a new technology would result in slow adoptions rates, we were hoping to uncover the following elements in order to move into PHASE 2 of the pilot:

- Refine workflows that tackle issues like scheduling discrepancies;
- Examine staff inefficiencies;
- Increase staff and patient satisfaction;
- Discover the challenges on organizational culture and change management towards technology-based solutions;
- Showcase that the adoptability of this solution would be utilized by wide demographic of patients and;
- Gain insight about the solution we were testing.

4. What was your solution and how did you bring your project to life? Bullet point narrative describing your solution, step-by-step.

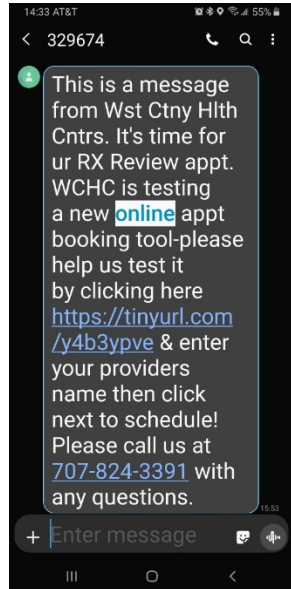
Healow Open Access Online Appointment Booking gives patients the freedom to book their appointment whenever and where-ever is convenient for them.

How does Healow Open Access Online Appointment Booking work?

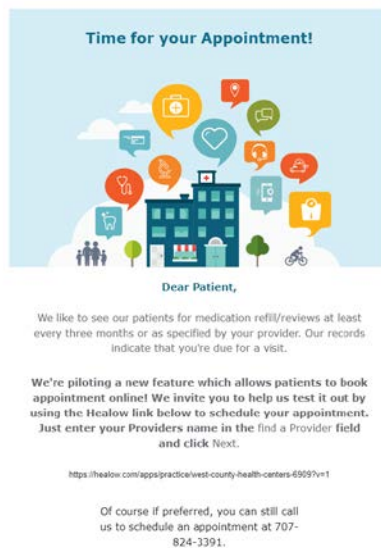
Steps for Pilot #1 | Medication Recall

- WCHC's IT Department builds the piloting Providers schedules to include visit type rules in eClinicalWorks which is directly linked to the appointment times made available to patients.
 - This included discussions about which visit types and what times to include.
- WCHC's IT Department built custom campaigns for Pilot #1 – Medication Recall.
 - Allows customizable messaging and multi prong communication (Text, Portal, Email)

- List of patients due for medication check/review pulled by WCHC's Quality Management Department.
 - WCHC IT Department configures excel spreadsheet to identify which modality the patient is configured for.
 - Excel spreadsheet with the list of patients was uploaded into eClinicalWorks.
- WCHC's IT Department publishes the custom campaign which triggers the patient communication via text, portal or email.
- Patient receives communication via portal, text and/or email.
- **Text Communication**



- **Portal & Email Communication**

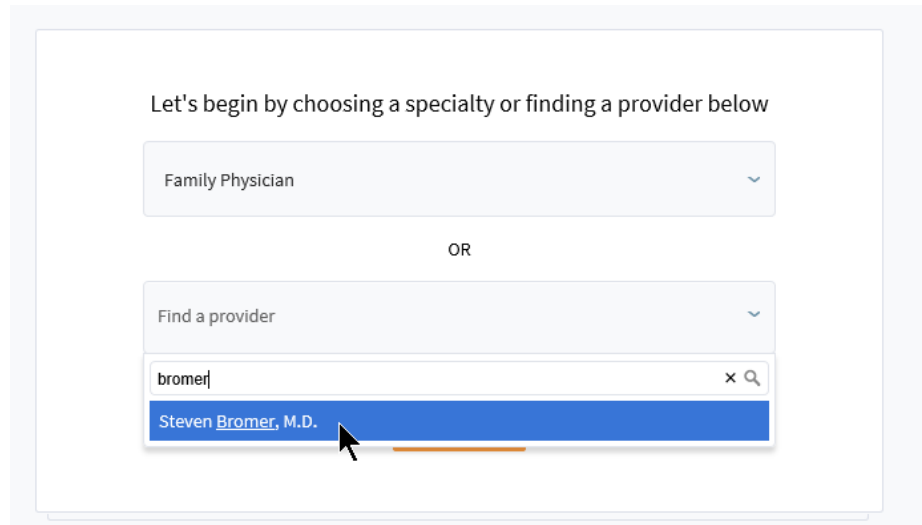


Have questions? [Contact Angela.](#)

- Patient clicks the “Book Now” or link to schedule their appointment.



- The link or “Book Now” button takes the patient to an online web-based site where the patient must search for their primary care provider.

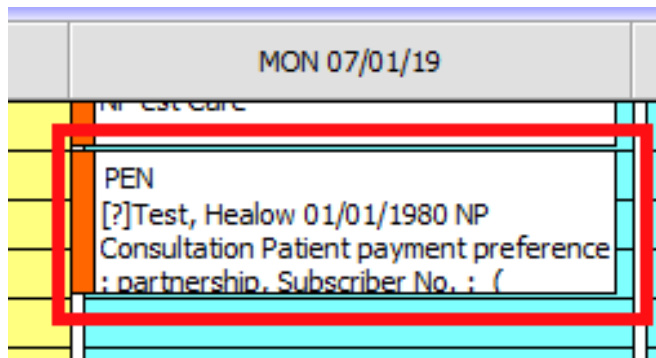
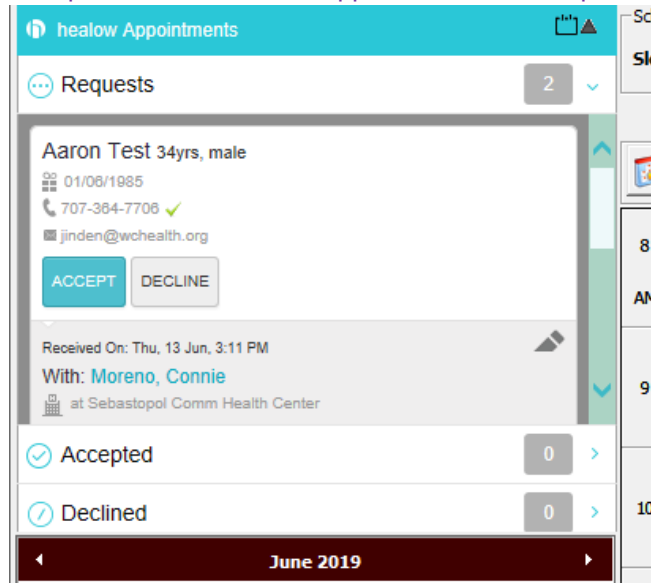


- Patient is asked, “If they have seen this provider before?”
- If the patient selects yes, then the patient can search for appointment times and schedule themselves directly onto the eClinicalWorks Schedule.

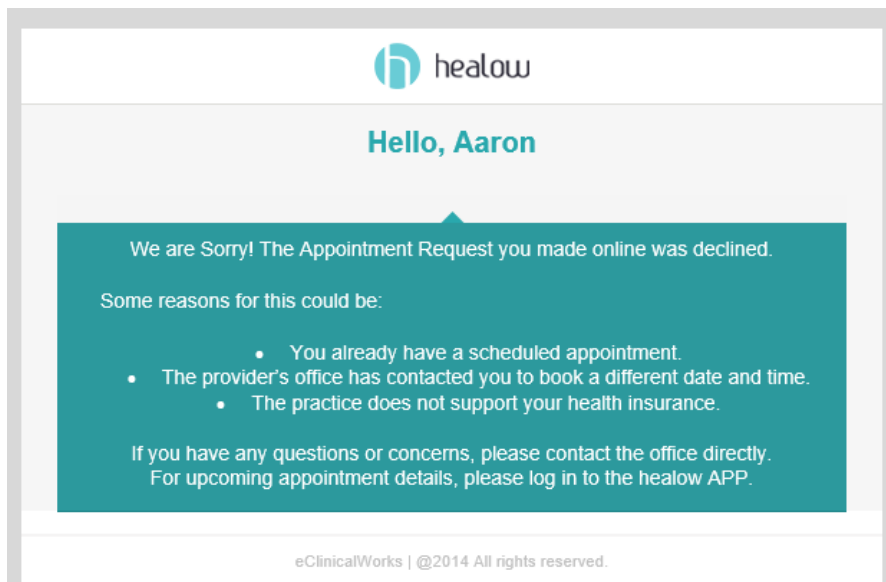
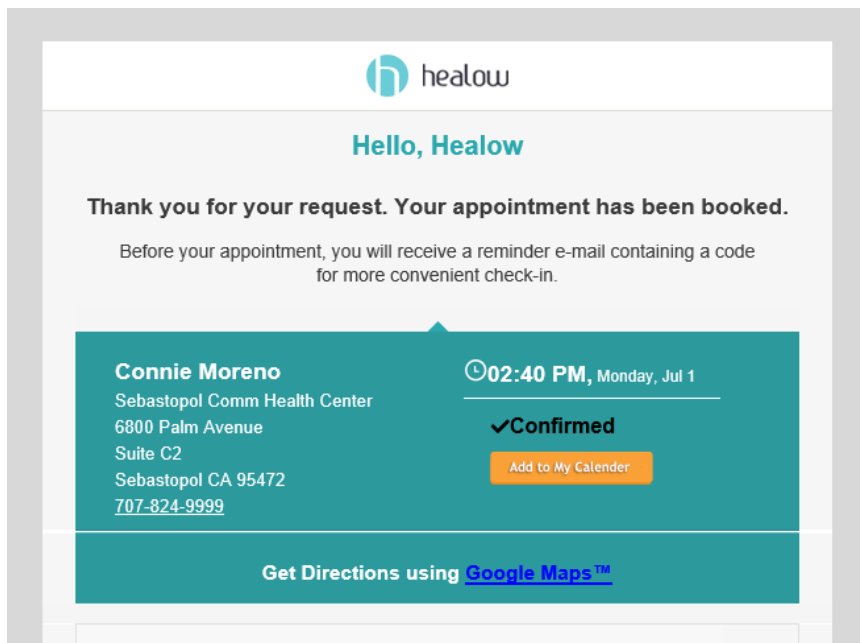
The screenshot shows the Healow patient portal interface. On the left, under 'Provider Details', is the profile for Steven Bromer, M.D., a Family Medicine physician who speaks English and Spanish. Below his profile is an 'About Steven Bromer' section and an 'Education' section listing Harvard Medical School (1995) and UCSF Family Medicine San Francisco General Hospital Fellowship. On the right, the 'Sebastopol Comm Health Center' address is shown: 6800 Palm Avenue, Suite C2, Sebastopol, CA 95472. Below this is a section titled 'Looking for a different date?' with a calendar view for July 2019. The date '02 Jul, 2019' is highlighted with a red box, and two appointment times are listed: '3:40 PM' and '4:00 PM'.

Have questions? [Contact Angela.](#)

- If the patient selects no, then they are prompted to provide specific for an appointment request.
 - The CTFO receives notice and ultimately declines the Healow appointment as this is meant for New Patient.
 - The CTFO always contacted the patient prior to declining to explain the process and book an appointment over the phone



- Throughout the process the patient receives email communication about the status of their booking, request, declination.

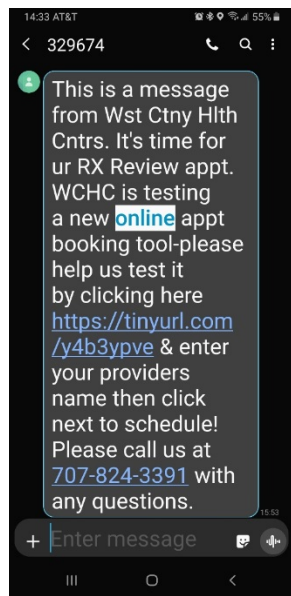


- If the patient is text or portal enabled, they will receive a reminder message 2 – 7 days prior to their scheduled appointment.
 - Through the text the patient has the capability to confirm or cancel their appointment both the 7- and 2-day reminders.
- 24 business hours before the appointment the Care Team Representative places a robust confirmation call to the patient regardless if the patient confirmed via text message.
- Patient arrives to clinic for their scheduled appointment.

Steps for Pilot #2 | Open Access Recall

Have questions? [Contact Angela.](#)

- WCHC's IT Department builds the piloting Providers schedules to include visit type rules in eClinicalWorks which is directly linked to the appointment times made available to patients.
 - This included discussions about which visit types and what times to include.
- WCHC's IT Department built text and portal messaging templates which included the piloting message and book now link.
- WCHC's IT Department and Care Team Representative pulled Open Access patient recall list in eClinicalWorks.
 - Manually went through each patient on list and determined if the recall alert has already been satisfied and if not, what is the recall appointment reason.
- Care Team Representative manually pushed communication based upon eCommunication settings.
 - If Portal or Text enabled-sent messages using one or both modalities.
 - If patient is minor or not enabled sent existing templated recall paper letter including an additional note about the Online Appointment Booking Pilot with website.
- Patient receives communication via portal, text and/or letter.
 - Text Communication



- Portal Communication (existing template with appointment booking link addition)

Dear _____,

During your last appointment, you were notified that we would be contacting you for a follow up visit. Your Provider requests you follow up at your earliest convenience for an office appointment for _____.

We're piloting a new feature which allows patients to book appointments online! We invite you to help us test it out by using the Healow link below to schedule your appointment. Just enter your Providers last name in the *find a Provider* field & Next

<https://healow.com/apps/practice/west-county-health-centers-6909?v=1>

Of course if preferred, you can still call us to schedule an appointment at 707-824-3391.

Your health is important to us and we look forward to hearing from you.

Sincerely,

- Letter Communication attached to standard recall letter.

Have questions? [Contact Angela.](#)

We're piloting a new feature which allows patients to book appointments online! We invite you to help us test it out by using the Healow link below to schedule your appointment. Just enter your Providers last name in *the find a Provider* field & Next

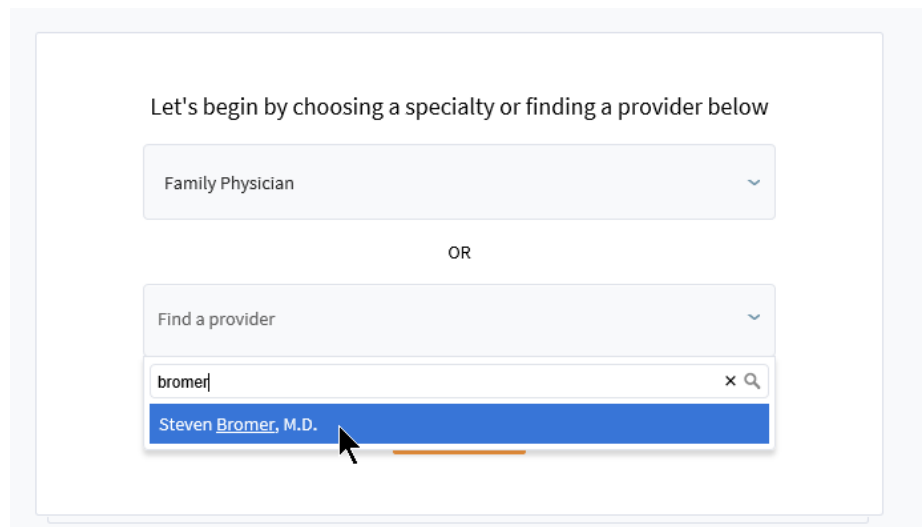
<https://healow.com/apps/practice/west-county-health-centers-6909?v=1>

When you come in ask us about our Patient Portal & Text messaging program!

- Patient clicks the “Book Now” or link to schedule their appointment.



- The link or “Book Now” button takes the patient to an online web-based site where the patient must search for their primary care provider.



- Patient is asked, “If they have seen this provider before?”
- If the patient selects yes, then the patient can search for appointment times and schedule themselves directly onto the eClinicalWorks Schedule.

Have questions? [Contact Angela.](#)

healow
Patient Portal

Provider Details

Steven Bromer, M.D.
Family Medicine
Language(s)
English, Spanish

About Steven Bromer
Working in NYC as a dancer in the 1980s, Steve was inspired by the challenges of the AIDS epidemic to pursue medicine. He attended Harvard Medical School and residency at UCSF. He has always had a passion for supporting health care systems accessible to all patients regardless of income. He is a family practitioner w/ special interest in taking care of patients with HIV, Hep C & Substance Use Disorders. In addition to his roles at WCHC, he is a Clinical Professor of Family Medicine at UCSF.

Education
Harvard Medical School
1995
UCSF Family Medicine San Francisco General Hospital
Fellowship

Sebastopol Comm Health Center
6800 Palm Avenue, Suite C2
Sebastopol, CA 95472

Have you been here?
Your response will

Looking for a different date?

02 Jul, 2019

Tue 02 Jul Wed 03 Jul Thu 04 Jul

3:40 PM
4:00 PM

- If the patient selects no, then they are prompted send an appointment request and provide weekday & time specifics.
 - The CTR receives notice and ultimately declines the Healow appointment as this is meant for New Patient.
 - The CTR always contacted the patient prior to declining to explain the process and book an appointment over the phone

healow Appointments

Requests 2

Aaron Test 34yrs, male
01/08/1985
707-384-7706 ✓
jinden@wchealth.org

ACCEPT DECLINE

Received On: Thu, 13 Jun, 3:11 PM
With: **Moreno, Connie**
at Sebastopol Comm Health Center

Accepted 0
Declined 0

June 2019

Have questions? [Contact Angela.](#)

MON 07/01/19	
NP Test Care	
PEN	
[?]Test, Healow 01/01/1980 NP	
Consultation Patient payment preference	
: partnership, Subscriber No. : (

- o Throughout the process the patient receives email communication about the status of their booking, request, declination.

The screenshot shows an email confirmation from Healow. At the top is the Healow logo. Below it, the text reads "Hello, Healow". The main message says "Thank you for your request. Your appointment has been booked." and "Before your appointment, you will receive a reminder e-mail containing a code for more convenient check-in." The appointment details are: **Connie Moreno**, Sebastopol Comm Health Center, 6800 Palm Avenue, Suite C2, Sebastopol CA 95472, 707-824-9999. The appointment is for **02:40 PM, Monday, Jul 1** and is **Confirmed**. There is an "Add to My Calendar" button and a link to "Get Directions using Google Maps™".

The screenshot shows an email declination from Healow. At the top is the Healow logo. Below it, the text reads "Hello, Aaron". The main message says "We are Sorry! The Appointment Request you made online was declined." and "Some reasons for this could be:" followed by a bulleted list:

- You already have a scheduled appointment.
- The provider's office has contacted you to book a different date and time.
 - The practice does not support your health insurance.

The email concludes with "If you have any questions or concerns, please contact the office directly. For upcoming appointment details, please log in to the healow APP." At the bottom, it says "eClinicalWorks | @2014 All rights reserved."

Have questions? [Contact Angela.](#)

- If the patient is text or portal enabled, they will receive a reminder message 2 – 7 days prior to their scheduled appointment.
 - Through the text the patient has the capability to confirm or cancel their appointment both the 7- and 2-day reminders.
- 24 business hours before the appointment the Care Team Representative places a robust confirmation call to the patient regardless if the patient confirmed via text message.
- Patient arrives to clinic for their scheduled appointment.

5. What challenges or hiccups did you face in the process?

- a. Prior to the configuration process, we believed that it was possible to utilize multiple visit type rules when setting up the providers schedule, which would allow providers to build a “perfect schedule” and have patient search for a specific Visit Type (ex: Annual Exam, Well Child Exam etc.). However, when we went to build this in our system, we learn that this feature was not yet available. In lieu of this insight we changed course and created one visit type rule per piloting provider.
- b. It was discovered when utilizing the Custom Campaign outreach featuring the Healow booking widgets the system will automatically remove the widget for patients who are assigned to providers that are NOT activated in online appointment booking.
- c. Customization of appointment reason dropdowns were needed for any activated providers as the patient side had list of reasons that did not fit our practice or pilot. Was able to work on configuring list provider specific.
- d. Initial Custom Campaign had high failure rate as configurations were not complete found portal failed because facility ID's were not included on excel sheet and facility tags were not removed from portal msg. Also found several patients were not uploaded at all because their patient account is alpha numeric which is a recognized Bug in eClinicalWorks. Created a workaround to allow all communication to be accepted in the Custom Campaign.
- e. The Online Appointment Booking system is set up to allow brand new patients send in an appointment request with no way to remove that option-we found that 3 patients utilized this option instead of the direct booking available to existing patients thus creating an Appointment Request which if accepted would have created a duplicate patient account.

6. Results: Describe what happens when you implemented your solution. How was it received? What worked? What didn't work? What surprised you about the outcome?

- a. Call Center staff & Care Team members really loved the idea allowing patients to control when and how they scheduled appointment. They felt that this allowed them to focus on patients in other ways.
- b. We were a bit surprised on the low number of patients who utilized the system, we believe this is due to the fact that we didn't market the tool prior to the pilot. eClinicalWorks states that Healow Online Appointment Booking usually gets off to a slow start even when full fledged marketing & education campaigns are done, so they were not surprised by our numbers.
- c. The age & geographic location range of patients who utilized the online booking tool shows that despite long held beliefs our patient population is ready and willing to use technology-based tools to engage in their healthcare.
- d. *We found that despite rolling out text messaging and re-rolling out patient portal a year ago, many staff were still uncomfortable using this tool to communicate with patients. Instead relying on outdated and inefficient communication.*

- e. *The number of patients who are text and/or portal enabled is not at the level that we believe it should be. It is critical to change the culture around this and build a foundation of text and portal enabled patients to set up for future successes in this area.*
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Lessons Learned

Share key lessons learned from your project (e.g., advice for someone else who is trying to adapt your idea). Please write in a way you would offer someone your reflections or advice about moving forward with a similar project.

1. *Gain staff buy-in – testing technology is a huge financial investment but more importantly it impacts staff, so make sure you communicate the value and advantage of launching your Healow Open Access Solution.*
 2. *Build a foundation and culture around eCommunication tools such as Portal & Text messaging-when you have a bigger base of enabled patients the value added, and adoptability increases substantially.*
 3. *We found that a sturdy foundation of portal and text enabled patients will greatly increase the adoptability*
 4. *Group training is not enough. It is important to sit with the Care Team Representative to reinforce the capabilities of the system to alleviate fears.*
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Next Steps

Share 5-7 short bullet-pointed next steps for your project beyond the scope of the program timeline.

1. *Interview patients that received a message about scheduling their appointment online but did not respond. We are looking to gain insights into how this program*
 2. *Increase communication with staff around Text & Portal enabling patients as a basis for the Online Appointment Booking. Pitch concept to all staff in broad manner.*
 3. *Collect information to build Provider Healow Profiles*
 4. *Standardize eCW schedule builds across all sites in preparation for Visit Type scheduling base Open Access Online Appointment Booking.*
 5. *Align patient outreach via multiple modalities with Clinical Priorities so recalls coincide with the Online Appointment Booking “Go Live”*
 6. *Train all staff on management of Healow Appointments*
 7. *Reaching out via Healow Open Access to our Partnership Health Plan patients that are due for their Annual Recall Health Screenings.*
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Quotes

List at least three verbatim quotes from end users or other stakeholders who participated in the process. Quotes can be about the process of implementing your solution, about the pain points they encounter, or about how they feel about the new solution.

Quote 1: Context of the problem

Quote	“As a working mom, I recognize that we are unable to offer access when we believe patients need it. By adopting this tool, we are expanding access for patients so they can make or change appointments as they need to (or can switch to: on their time).”
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Quotee Full Name	<i>Summer Penn</i>
Quotee's Title	<i>IT Project Manager</i>
Quotee Photo	DO NOT upload the photo here. Upload the photos to " Technology Hub Case Study Materials " folder using this naming format: HEALTH CENTER NAME_QUOTEE NAME.

Quote 2: Why the solution works/doesn't work

Quote #2	<i>"With the progression of technology in everyday facets of our life, the feature of being able to have access and book appointments with their healthcare provider is absolutely key in keeping up with the continuity of care for our patients. It makes healthcare more accessible bringing it to the patient's computers and mobile devices."</i>
Quotee Full Name	<i>Tristan Turner</i>
Quotee's Title	<i>Care Team Representative</i>
Quotee Photo	DO NOT upload the photo here. Upload the photos to " Technology Hub Case Study Materials " folder using this naming format: HEALTH CENTER NAME_QUOTEE NAME.

Quote 3: About the testing/piloting process itself

Quote #3	<i>"I appreciate that WCHC is trying to make it more convenient for me to make appointments and access my doctor. It's hard to get through when I don't have the time to call during specific hours of the day. Booking myself makes it easy."</i>
Quotee Full Name	<i>Anonymous – does not want to be identified by name or photograph.</i>
Quotee's Title	<i>Patient</i>
Quotee Photo	DO NOT upload the photo here. Upload the photos to " Technology Hub Case Study Materials " folder using this naming format: HEALTH CENTER NAME_QUOTEE NAME.

Case Study Materials and Assets

Note: DO NOT upload materials here. Upload the tools to "Technology Hub Case Study Materials" folder using this naming format: HEALTH CENTER NAME_TOOL/FILE NAME.

From the Vendor: Background Resources About the Solution

To help describe how a tech solution/vendor for the reader, please provide as many of the below resources you have available:

- News articles on the vendor
- Screenshots of the solution
- A "how it works" visual or video from the vendor
- Name and contact info of the vendor lead

From Your Project: Key Tools

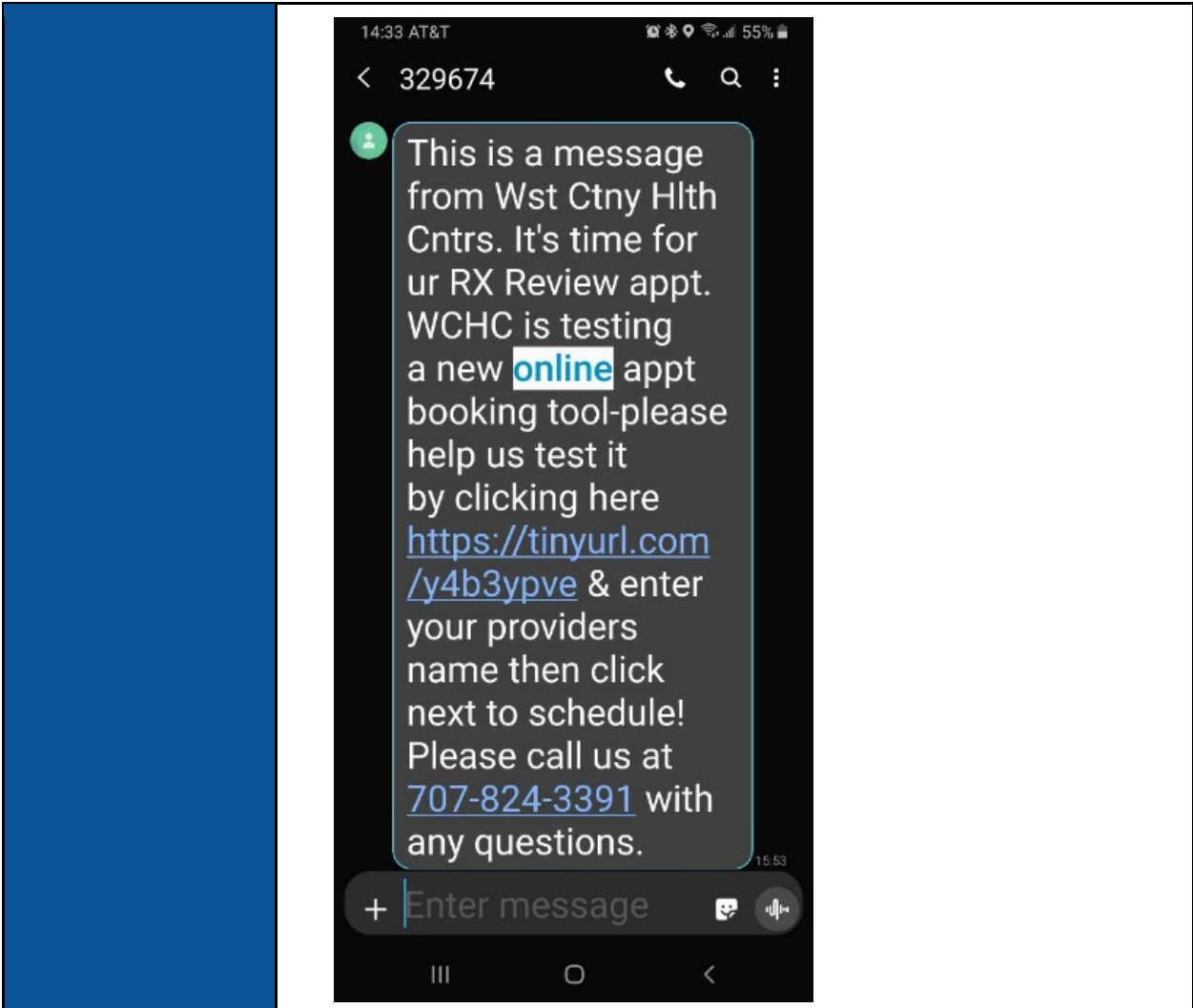
[Upload 1-3 PDF'ed tools](#) that were created to advance your work. Please "brand" documents with your organization name or logo.

Tool Name	Tool Description
<i>Tool #1 Healow Agent Setup OpenAccess Booking</i>	This training document was created to assist users in setting up the Healow Agent on their workstation.
<i>Tool #2 Healow OpenAccess Online Appointment Booking Requests</i>	This training document was created to support Front Office staff in using the Healow Agent to manage the appointment requests made through the online booking system.
<i>Tool #3 Healow OpenAccess Powerpoint for Staff</i>	Powerpoint presentation to engage staff in this work. Illustrates what Healow Online Appointment is and why it's important for our patients and it clearly outlines the expectations of staff.

From Your Project: Visuals/Screenshots Describing Your Project

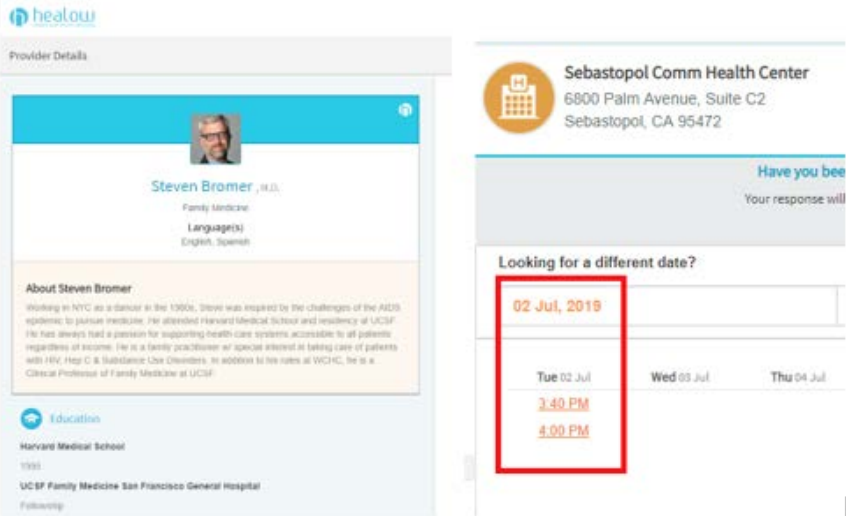
[Upload at least 3 photos/files](#) from your project (e.g., photos of end users in the project, workflow document, powerpoint, geographic map, technology used, data report, 3-D model, rough draft version of solution, etc.).

File #1 Caption	Screenshot of the text message that a patient received in pilot #1.
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File #2 Caption

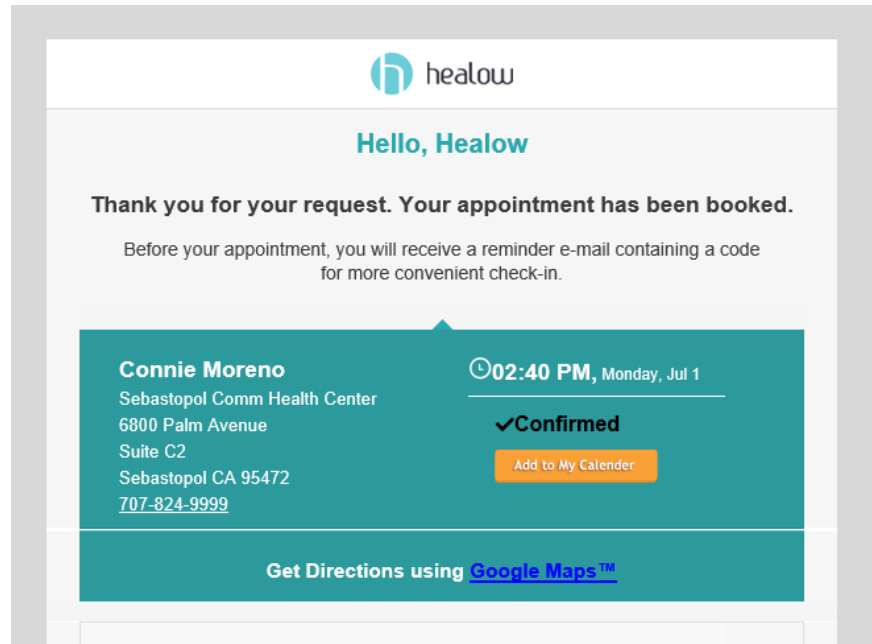
A screenshot of the biography of the provider along with the available times that are open to the patient to schedule their appointment with their provider.



Have questions? [Contact Angela.](#)

File #3 Caption

Screenshot of the confirmation email the patient receives when the appointment they booked was successful.

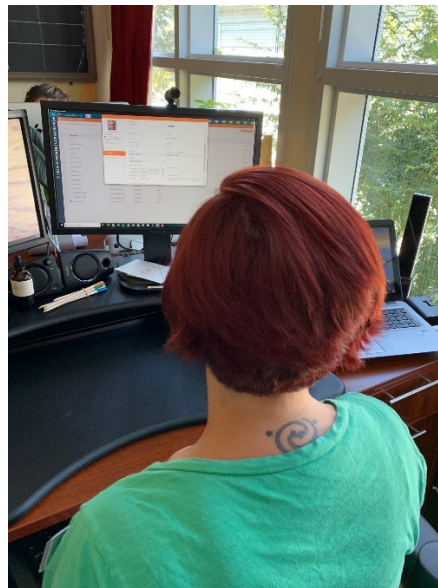


From Your Project: Images of Your Solution at Work In Your Organization

Upload at least 2 high resolution, website worthy (not dark) photos depicting the solution at work. Please get consents for use on CCI website from anyone whose face is visible in the photos.

**Photo #1
Caption**

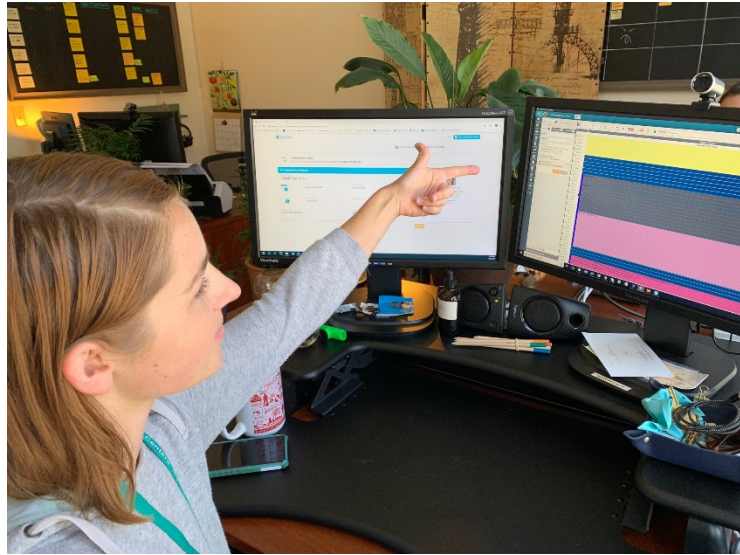
This is a photo of our Agency Trainer creating the biography for our piloting provider.



Have questions? [Contact Angela.](#)

Photo #2
Caption

This is a photo of our Information Systems Specialist showcasing what it looks like in eClinicalWorks when our Care Team Representative receives an alert that a patient would like to schedule with a provider that they have not seen before.



Again, **PLEASE DO NOT** upload materials here. Upload the tools to "[Technology Hub Case Study Materials](#)" folder using this naming format: **HEALTH CENTER NAME_TOOL/FILE NAME.**

Thank you!

Have questions? [Contact Angela.](#)