



## Using Patient Portals to ensure patients receive all recommended doses of a GSK immunization

### Helping ensure patients receive all doses in an immunization series

When providers have patients for whom an immunization with multiple doses in a series has been ordered, they may encounter situations where patients are delayed in receiving or have not received the subsequent doses in the series. To help ensure patients receive all the required doses, it is paramount for providers to reinforce the importance of completing the recommended dosing regimen.

### Benefits of the Patient Portal for immunization series completion

The Patient Portal can be used to remind patients that they are due or overdue for recommended immunizations or immunization doses. The Patient Portal can also be used to keep the patient's health record updated with immunizations received outside of the practice; for example, at a pharmacy. Use of the Patient Portal may improve health care quality, such as by increasing immunization rates.

### Considerations:

- Not all patients are enrolled to use the Patient Portal
- All features of the Patient Portal may not have been activated at the practice

*If you have further technical questions, consult your internal or external EHR support resources.*

*This guide provides a high-level overview of how to use the Allscripts TouchWorks EHR Patient Portal to create patient reminders for immunization series completion, as well as how to enable communication to the provider about immunizations received outside the practice. This overview is designed to provide guidance for you, your practice's EHR champion, or IT staff.*

*Please note that this guide was created based upon Allscripts TouchWorks EHR version 20. Screens and features may change as new software versions are released.*

*This guide is for informational purposes only and is not intended to replace detailed instructions provided to you by your internal or external EHR support resources. The information in this guide is subject to change without notice. GSK makes no claims or warranties about the applicability or appropriateness of this information.*

## Using Patient Queries and Patient Communication settings in Allscripts TouchWorks EHR FollowMyHealth

Allscripts TouchWorks EHR provides a multi-aspect feature called **FollowMyHealth** to enable patient interaction via the Patient Portal. **Patient Queries** can be used to create a report based on specific criteria. The **Patient Communication settings** can enable focused **Reminder Messages** to be sent to the patient via the Patient Portal.

When creating **Reminder Messages** for patients, consider advising them on how to share information with you (ie, call the practice, or message a particular provider with details).

### How to send a Reminder Message to the patient

The example below illustrates the steps needed for a two-dose immunization where the second dose is due or overdue.

- Navigate to **Patient Query**
- Select **Manage Queries**, then select **New** to create a new **Query**. Add a **Query Name**, and select **OK**
- From the **Criteria List**, select **Immunizations**
- Search for and select criteria for the **Query**; for example, Product X. Click **OK**
- Add additional criteria to the **Query** as appropriate
- Select **OK**

Query Name	Last Process	Status
Pneumococcal	12/02/2020 08...	Successful
Polycystic Kidney Disease Patients	03/12/2020 08...	Successful
Portal Patient Status	03/30/2019 08...	Successful
Proteinuria greater than 500 mg/dl	05/28/2019 08...	Successful
Reminders - Hep B A	07/07/2019 08...	Successful
Reminders - Hep B C	07/08/2019 08...	Successful
Reminders - Hep B G	07/07/2019 08...	Successful
Reminders - Hep B M	07/07/2019 08...	Successful
Reminders - Hep B M	07/07/2019 08...	Successful
Reminders - Hep B R	07/07/2019 08...	Successful
Reminders - Hep B S	07/08/2019 08...	Successful
Reminders - Product X	10/08/2019 08...	Successful

- Options
  - New Group
- Criteria
  - Allergies
  - Appointments
  - Charges
  - Demographics
  - Diagnosis
  - Documents
  - Encounters/Insurance
  - Medications
  - Note Findings
  - Orders
  - Past Medical History
  - Patient Communication
  - Primary Care Providers
  - Results
  - Social History
  - Surgical History
  - Immunizations**
  - Vitals
- Query Actions
  - Save and Return
  - Cancel and Close

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- From the **Query Actions** list, select **Save and Return**
- Navigate to the **Patient Query** tab and select **Activate Query**
- From the **Action Set Properties** tab, create a corresponding **Action Set**, setting appropriate properties
- From the **Patient Communication** tab, select **Portal Communications** in the **Communication Method** dropdown

- **Text Templates** to be used in **Portal Communication** can be created and managed in the **TW Admin, Notes Admin** area
- Link the **Patient Query** and the **Action Set**
- When the **Query** runs, all registered portal patients in the resulting list will receive the selected communication in their portal inbox

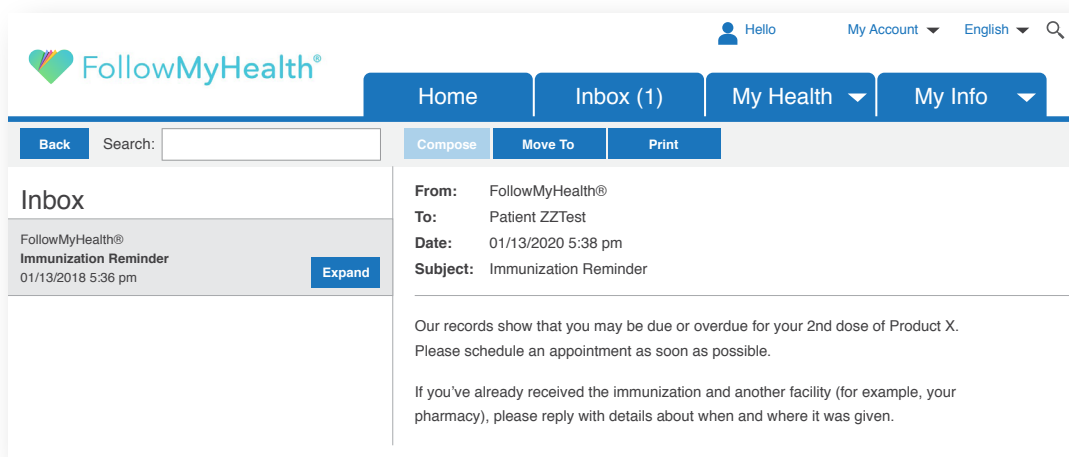
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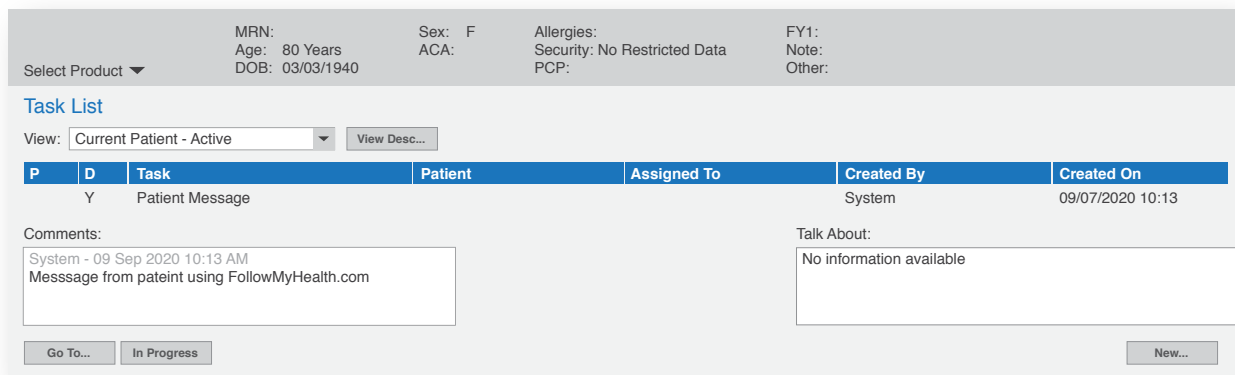
## Updating patient immunization information on the portal

The Allscripts TouchWorks EHR **FollowMyHealth** portal functionality, enables patients to update their demographic and HIPAA information (permission for others to access or view patient clinical information). Clinical information updates must be done by the practice.

Patients can message providers with details of immunizations given elsewhere; for example, a pharmacy. Details of an immunization can include the date that the second dose of Product X was given, as well as the name and location of the pharmacy.



Responses to a portal communication are viewed in the communication owner (individual or team) **Task List**, indicating the **FollowMyHealth Patient Message**.



Product X second dose information is transcribed by office staff to the Allscripts TouchWorks EHR, and the patient's immunization history is updated in the a patient's chart.

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