

## 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 eClinicalWorks 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 eClinicalWorks EHR version 11. 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 Immunization Registry Reports and e-Messages in eClinicalWorks EHR Patient Portal

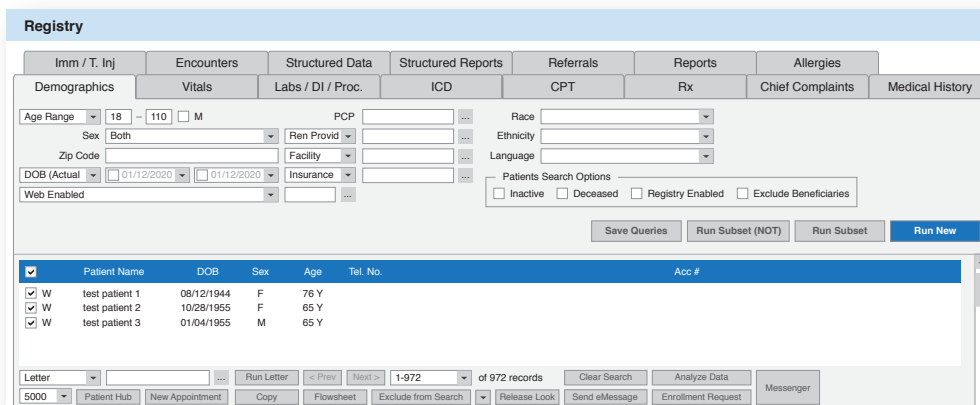
eClinicalWorks EHR provides a multi-aspect feature called the **Patient Portal** to enable secure patient interaction. A **Registry Report** can be used to send **e-Messages**, based on specific criteria, to the patient.

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

### How to send an e-Message to the patient

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

- Select the **Registry** button
- Select the **Demographics** tab
- Select appropriate **Age Range** and **encounter dates**, select **Web Enabled** from the dropdown and select **Run New**



The screenshot shows the 'Registry' interface with the 'Demographics' tab selected. The search criteria are: Age Range: 18 - 110, Sex: Both, PCP: [blank], Race: [blank], Zip Code: [blank], Facility: [blank], Language: [blank], DOB (Actual): 01/12/2020, Insurance: [blank], Web Enabled: [checked]. The 'Patients Search Options' are: Inactive [unchecked], Deceased [unchecked], Registry Enabled [checked], Exclude Beneficiaries [unchecked]. The 'Run New' button is highlighted. Below the search criteria is a table of patients:

	Patient Name	DOB	Sex	Age	Tel. No.	Acc #
<input checked="" type="checkbox"/>	W test patient 1	08/12/1944	F	76 Y		
<input checked="" type="checkbox"/>	W test patient 2	10/28/1955	F	65 Y		
<input checked="" type="checkbox"/>	W test patient 3	01/04/1955	M	65 Y		

At the bottom, there are buttons for 'Letter', 'Run Letter', 'Patient Hub', 'New Appointment', 'Copy', 'Flowsheet', 'Exclude from Search', 'Release Lock', 'Send eMessage', 'Enrollment Request', and 'Messenger'. The 'Send eMessage' button is highlighted.

- Select the **Imm/T.Inj** tab
- Select appropriate criteria to identify patients who will receive the message via the portal, such as the **Immunization Name, Date, Patient Age**; and set **Number of Doses to  $\geq 2$**  and select **Run Subset (Not)**
- The list of patients matching the criteria displays; every patient is selected by default
- Select **Send e-Message**

# Using Patient Portals for immunization series completion in eClinicalWorks EHR



- Compose message to be sent to the patient via the **Patient Portal**
- Select **Send**

Portal eMsg

From: [ ]

To: test patient 1

Subject: Product X Second Dose Reminder

Preventive / Follow-up Care Message

Templates

Load Save Save As

X [ ] [ ] B I U [ ] [ ] T

We are writing to let you know that you are due or overdue for your second dose of Product X.

If you received your second dose of Product X outside of our practice, for example at a pharmacy, please reply to this message stating the date of the immunization and the pharmacy name.

Send Cancel

## Updating patient immunization information on the portal

The eClinicalWorks EHR **Patient 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.

Welcome to the Patient Portal

Our patient portal is a safe and secure way to communicate with your physician clinics. The patient portal is designed for you, the patient. Using the patient portal will keep you connected to your physicians and allow you to take an active part in your healthcare.

Click [here](#) to access a map of our clinic locations.

If you have any questions regarding the Patient Portal, click [here](#) to send us an email.

**Should you need immediate medical attention, please contact 911.**

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**Messages (5)**

Subject:	Date:
Product X Second Dose Reminder	01/15/21
Free Seminar for Women	06/09/21
Orthopedic Clinic is Moving	06/09/21
RE: Phone	04/06/21

create a message view all messages

**Current Medication**

Lisinopril  
5mg once-daily

request refill view all meds

**Latest Lab Results**

Lab:	Date:
RAD CHEST 2 VIEWS...	01/18/21
RAD CHEST 4 OR MOR...	08/16/19
CBC (INCLUDES DIFF...	02/12/19
SEROTONIN SERUM (S...	01/09/18

view all my labs

# Using Patient Portals for immunization series completion in eClinicalWorks EHR



The patient can open the **Patient Portal** secure message from the **Messages** Section, then:

- Select **Reply** and enter the pharmacy name and date for second dose of Product X received
- Select **Submit** to transmit the message to the practice

Powered by eClinicalWorks

EXPAND ALL

Dashboard

Medical records

My Account

**Messages** ^

[Inbox](#)

Refill Requests

Ask a Question

Appointments

Education

Reply

To: Portal Message Administrator

Subject:

Re: Product X Second Dose Reminder

Message:

Pharmacy X  
Date 1/12/2021

To:

Submit Cancel

- The practice receives the patient's reply in the **Telephone/Web Encounters** tab

Telephone/Web Encounters						
		Open	Addressed		All	All Open (All Dates)
Provider	All	Assigned to	Facility	All		
w	Ref#	Date	Patient Name	Provider	Reason	
	1043037	01/15/2020	test patient 1		Re: Product X Second Dose	

- Product X second dose information is transcribed by office staff to the eClinicalWorks EHR, and the patient's immunization history is updated in the patient's chart

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