

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

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
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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**, then select **Web Enabled** from the dropdown
- As desired, from the **Encounters** tab, select an appropriate date range, and select **Run New**

The screenshot shows the 'Registry' interface with the 'Demographics' tab selected. The interface includes several filter fields: 'Age Range' (dropdown), 'From' and 'To' date fields, a checkbox for 'M', 'Sex' (dropdown set to 'Both'), 'PCP' (dropdown), 'Zip Code' (text input), 'DOB (Actual)' (dropdown), and two date fields for '02/05/2023'. A 'Select' dropdown menu is open, showing options: 'All', 'Web Enabled', 'Non Web Enabled', 'Preferred Method: Text', 'Preferred Method: Voice', 'Preferred Method: Letter', and 'Preferred Method: EMail'. A blue banner at the bottom of the form contains the note: 'Note: The Registry will only return results for patients with encounters. i'.

Using Patient Portals for immunization series completion in eClinicalWorks EHR



- 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 Range**, and set **Number of Shots to ≥ 2** and select **Run Subset (Not)**
- The list of patients matching the criteria displays; every patient is selected by default
- Select **Send e-Message**
- The list of patients matching the criteria displays; every patient is selected by default
- From the options at the bottom of the screen, select **Messenger**

Registry

Demographics Vitals Labs / DI / Proc. ICD CPT Rx Chief Complaints Medical History **Imm/T.Inj** Encounters Structured Data Reports Saved Reports Referrals Reports Allergies

Names ... Result Date Range To
Lot Number Number of Shots >=

Note: The Registry will only return results for patients with encounters. ?

Save Queries Run Subset (NOT) Run Subset Run New

Clear Search Copy Release Lock Analyze Data Exclude from Search Bulk Inactivate/Activate Patients

| <input checked="" type="checkbox"/> | Patient Name | DOB | Sex | Age | Tel. No. | Acc # |
|-------------------------------------|---------------|------------|-----|------|----------|-------|
| <input checked="" type="checkbox"/> | W Doe, Jane | 08/12/1944 | F | 78 Y | | |
| <input checked="" type="checkbox"/> | W Smith, Mary | 10/28/1955 | F | 62 Y | | |
| <input checked="" type="checkbox"/> | W Jones, Mike | 01/04/1955 | M | 62 Y | | |

Letter Run Letter Flowsheet Patient Hub New Appointment Messenger

No. of Result: 100 Total Counts: 0 < Prev Page 1 of 1 Next >

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

Portal eMsg

From

To

Subject

Preventive / Follow-up Care Message

Templates

Load Save Save As

✕ 📄 📄 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.

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](#)

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 |
| | <input type="checkbox"/> 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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