

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 NextGen 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 NextGen EHR version 5.8 UD3. 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 Recall Plans in the NextGen EHR Patient Portal

NextGen EHR provides a multi-aspect feature called the **Patient Portal** to enable patient interaction. **Recall Plans** can be used to send **Reminders** based on specific criteria to the patient via the portal.

When creating **Reminders** 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 a Reminder to the patient

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

- Create a **Patient List Report** based upon appropriate criteria, such as patients who have received only one dose of Product X, patient **Age**, service **Date Range** for the **Patient List Report**
- Add patients from the **Patient List Report** to a **Recall Plan** by clicking the **Recall** icon



- The **Recall Plan Maintenance** window displays
- Select the appropriate **Recall Plan**
- Select the **Return Date**, **Event**, **Resource** and **Location**
- Select **OK** to associate the **Recall Plan** with all patients on the **Patient List Report**

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NOTES:

- The **Recall Plan** configuration enables the ability for **Recall Messages** to be automatically printed or sent to the patient's NextGen **Patient Portal** if the practice is using the portal
- The **Recall Plan** functionality is only available in NextGen EHR version 5.8 UD3 or higher

Updating patient immunization information on the portal

- For the **Reminder** to display in the **Patient Portal**, the **Recall Plan** must have the **Enable Recall Notifications** selected to be sent via the **Patient Portal**.
- Once the **Recall Plan** is created and set for portal notification, it must be assigned to the patient

The screenshot shows the 'Recall Plans' configuration window. The title bar reads 'Recall Plans' with standard window controls. The main content area is titled 'Recall Plan' and contains the following fields and options:

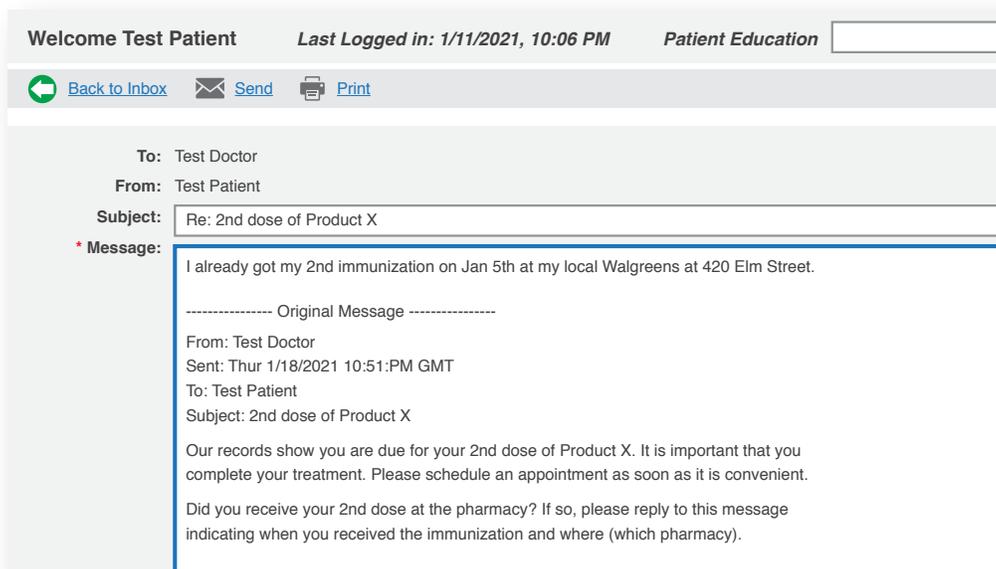
- Recall Plan:** A text field containing 'Patients Overdue for 2nd Dose of Product X'.
- Appointment Information:** A section containing:
 - Patient expected to return in:** A spinner box set to '60'.
 - Default Event:** A dropdown menu set to 'Adult Est. Patient - Portal' with an 'Allow override' checkbox.
 - Default Resource:** An empty dropdown menu with an 'Allow override' checkbox.
 - Default Location:** An empty dropdown menu with an 'Allow override' checkbox.
 - Which appointment status should discontinue participation in this plan?:** Radio buttons for 'Kept' (selected), 'Scheduled', and 'None'.
- Mailing Information:** A section containing:
 - Enable recall notifications to be sent via Patient Portal**
 - Generate Tasks:** A button.
 - Send 1st:** A dropdown set to '2nd dose Product X recall', a spinner set to '0', the text 'days prior', an unchecked 'Mailing Labels' checkbox, and an empty dropdown.
 - Send 2nd:** An empty dropdown, a spinner set to '0', the text 'days prior', an unchecked 'Mailing Labels' checkbox, and an empty dropdown.
 - Send 3rd:** An empty dropdown, a spinner set to '0', the text 'days prior', an unchecked 'Mailing Labels' checkbox, and an empty dropdown.
- Note:** A large text area for additional notes, with a 'Hide' checkbox to its right.

At the bottom right, there are three buttons: 'Next', 'OK', and 'Cancel'.

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- The **Reminder** displays in the **Reminders** section of the portal home page, and patients will receive a secure message in their portal inbox with information about the **Recall Notification**



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

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