



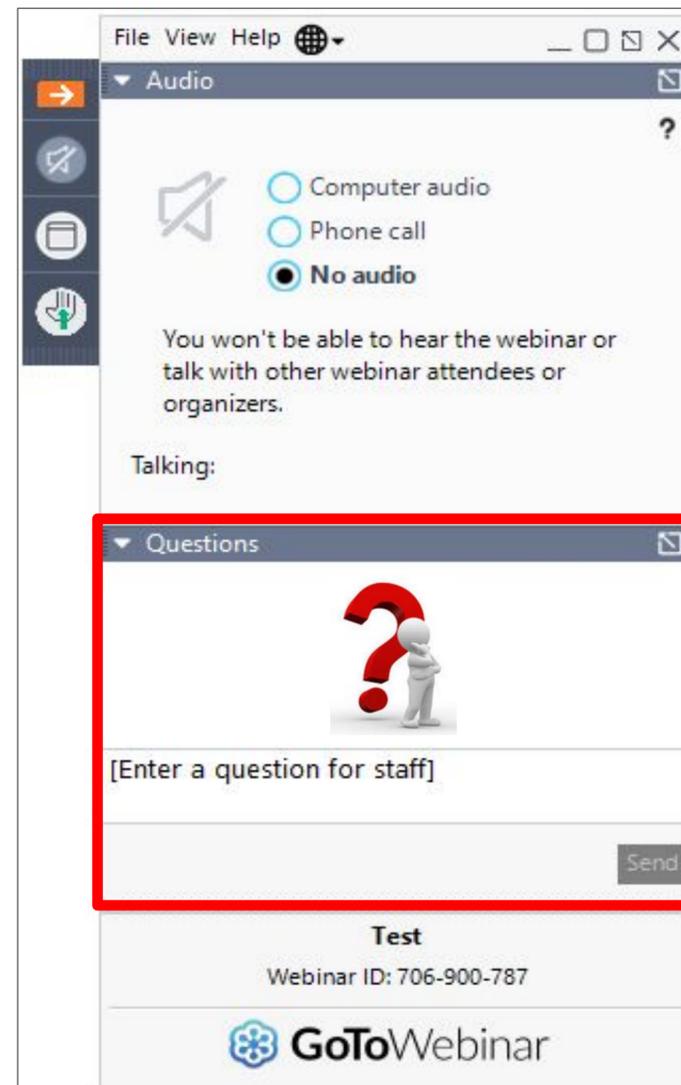
Data Integrity and the OP Patient Portal

Part 2
Webinar Series

Welcome to Data Integrity and the OP Patient Portal: Part 2

Audience: All

- Attendees will be muted. If you have a question, enter it into the **Questions** box.
- Any unanswered question(s) will be communicated to the Webinar attendees via email.



Recap of Data Integrity

Data Integrity, or the quality of data, is the first step toward **Data Governance**.

- **Quality** refers to the ability of data to be reliable enough to serve a specific purpose. Data quality possesses certain characteristics that determine whether the quality is sufficient.
- **Data governance** can be defined as an overall management of quality, usability, availability, security and consistency of an organization's data.

Recap of Data Integrity

To put this into perspective:

- As we move forward with new products and features, the overall management and integrity of data will become more important and play a vital role when paired with new technology.
- The data entered into OP, needs to be reliable enough to successfully send to the Portal. It needs to be **complete, valid, accurate, and consistent** across all practices.

Simply put, if we don't care about the quality of data going into our databases, we can't expect to feed **quality data** out of our databases.



Objectives

In this session, you will learn:

- How to prepare OP for the new OP Patient Portal, including:
 - The review of Appointment Types
 - The review of Visibility Settings
 - How to archive Database Records

Activity 1:

Perform Appointment Type Cleanup



Scenario:

Ensure all appointments are properly mapped to the IntelliChart portal but running a query to identify invalid **Appointment Types** attached to:

- Scheduled Appointments
- Visit Templates
- Patient Chart Defaults

We will:

- Run a query to compare the Appointment Type table with the 3 areas of OP where Appointment Types are applied.
- Query results display where there is a mismatch.

This activity accesses Database Viewer. Only an Administrator or staff member with permission: **Tools_DBViewer** can access DB Viewer.



Let's Get Started - SQL #1

1. Navigate to the SQL: [Invalid Appointment Types on Scheduled Appointments](#)
2. Use query results to adjust Appointment Types on Scheduled Appointments.

* This SQL may already be saved in a practice's DB Viewer as: **OPN_Appointment Type**.

Resource Diagram: Correct Appointment Type on Scheduled Appointments

1 Navigate to and open the scheduled appointment.

2 Use the Appt type drop-down menu to select a valid appointment type.

3 Save the appointment and repeat for all results of the query.

Window Content:

TESTPATIENT, ELLY
ID: 149 Sex: F DoB: 10/12/2012 Age on Appt Date: 7 yrs. 0 mos.
October 17, 2019

Appt text: TESTPATIENT, ELLY [216-555-1213 ID:149 DOB:10/12/2012] ~SICKVISIT, EST: Sore throat -- SJK

Appt reason: Sore throat

Appt type: ESTABLISHED SICK Start time: 4:00 PM

Location:	Type of Visit	Description	Duration
Staff:	PROCEDURE	PROCEDURE	30
Prim/alt ph	SICKVISIT, EST	SICK VISIT ESTABLISHED	15
Move-up of	SICKVISIT, NEW	SICK VISIT, NEW	30
Confirm sta	WELL VISIT, EST	WELL VISIT, ESTABLISHED	30
Arrival time	WELL VISIT, NEW	WELL VISIT, NEW	30
Presenter:	NEWBORN EXAM	INITIAL NEWBORN VISIT	30
	NURSE VISIT	IMMUNIZATION/SHOT	15
	CONSULTATION	CONSULTATION	15

Visit status: Well Visit
Room: After Hrs
Payment rcvd: Specialist \$0.00
Billing status: + Old Bal \$0.00
- Credits \$0.00

Financial Summary:
Pat credit: \$0.00 Pat ins bal: \$0.00 Pat ins cred: \$0.00
Fam balance: \$0.00 Fam credit: \$0.00 Fam ins bal: \$0.00 Fam ins cred: \$0.00

Buttons: Save, Cancel

Appointment Type Cleanup - SQL #2

1. Navigate to the SQL: [Invalid Appointment Types Associated to Visit Templates](#)
2. Use query results to adjust Appointment Types on Visit Templates.

*This SQL may already be saved in a practice's DB Viewer as: **OPN_Appointment Templates**.

Resource Diagram: Correct Appointment Type on Visit Templates

Navigate to the Template Editor and select the template: **Clinical tab > Encounter Templates or Well Visit Templates > Select the Template that is listed in the grid.**

Click the Edit button.

Save the template.

Click the ellipsis button to open the Choose Type of Appointment window.

Select a valid appointment type.

Click the red back arrow to apply your selection.

Return to the Template List and repeat for all results of the query.

Type of Visit	Description	Duration
Dept. : Providers		
NEWBORN EXAM	INITIAL NEWBORN VISIT	30
WELL VISIT, NEW	WELL VISIT, NEW	30
WELL VISIT, EST	WELL VISIT, ESTABLISHED	30
WELL VISIT, EXT	WELL VISIT, EXTENDED	45
PHONE FOLLOWUP	TELEPHONE FOLLOWUP	15
DISTANT, NEW	DISTANT, NEW	30
DISTANT, EST	DISTANT, EST	15
SICKVISIT, EST	SICK VISIT ESTABLISHED	15
SICKVISIT, NEW	SICK VISIT, NEW	30
SICK VISIT, EXT	SICK VISIT, EXTENDED	30
CONSULTATION	CONSULTATION	15
PROCEDURE	PROCEDURE	30
Dept. : Nursing		
EST	LACTATION, ESTABLISHED	15
NEW	LACTATION, NEW	30
MMUN	MMUN/SHOT	15

Appointment Type Cleanup - SQL #3

1. Navigate to the SQL: [SQL: Invalid Appointment Type Default in Patient Chart](#)
2. Use the query results to adjust Appointment Types Defaulted in the Patient Chart.

*This SQL may already be saved in your DB Viewer as: **OPN_Appointment Default**.

Resource Diagram: Correct Appointment Type Default in Patient Chart(s)

1 Navigate to and open the patient chart.

2 Click **Notes/Addl Info**.

3 Use the drop-down menu for default Sick and/or Well Visit type to select a valid appointment type.

4 Close/save the chart and repeat for all results of the query.

Patient Chart: ELLY TESTPATIENT (149) Sex: F DOB: 10/12/2012 Age: 7 yrs. 0 mos. Ins: AETNA PPO

Miscellaneous Notes

Default well visit type: ESTABLISHED WELL

Default sick visit type: PROCEDURE

Employed / Student: SICKVISIT, EST

Marital status: SICKVISIT, NEW

Miscellaneous notes: WELL VISIT, EST

WELL VISIT, NEW

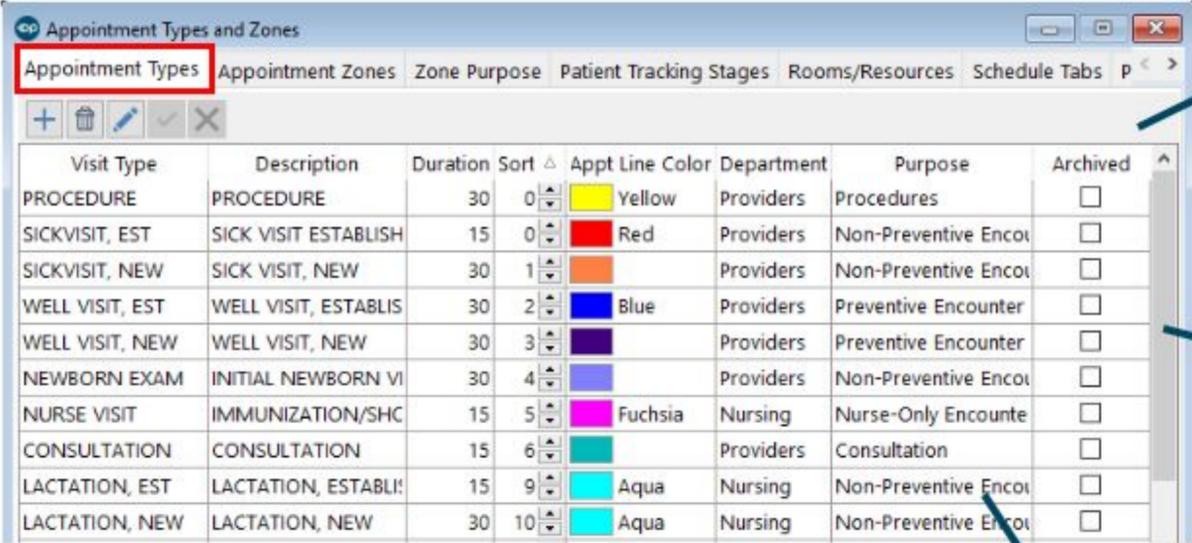
NEWBORN EXAM

NURSE VISIT

CONSULTATION

Why Validate Appointment Types?

Appointment Type mapping from OP to IntelliChart is a vital piece of data integrity!



Visit Type	Description	Duration	Sort	Appt Line Color	Department	Purpose	Archived
PROCEDURE	PROCEDURE	30	0	Yellow	Providers	Procedures	<input type="checkbox"/>
SICKVISIT, EST	SICK VISIT ESTABLISH	15	0	Red	Providers	Non-Preventive Encou	<input type="checkbox"/>
SICKVISIT, NEW	SICK VISIT, NEW	30	1	Orange	Providers	Non-Preventive Encou	<input type="checkbox"/>
WELL VISIT, EST	WELL VISIT, ESTABLIS	30	2	Blue	Providers	Preventive Encounter	<input type="checkbox"/>
WELL VISIT, NEW	WELL VISIT, NEW	30	3	Purple	Providers	Preventive Encounter	<input type="checkbox"/>
NEWBORN EXAM	INITIAL NEWBORN VI	30	4	Light Blue	Providers	Non-Preventive Encou	<input type="checkbox"/>
NURSE VISIT	IMMUNIZATION/SHC	15	5	Fuchsia	Nursing	Nurse-Only Encounte	<input type="checkbox"/>
CONSULTATION	CONSULTATION	15	6	Teal	Providers	Consultation	<input type="checkbox"/>
LACTATION, EST	LACTATION, ESTABLIS	15	9	Aqua	Nursing	Non-Preventive Encou	<input type="checkbox"/>
LACTATION, NEW	LACTATION, NEW	30	10	Aqua	Nursing	Non-Preventive Encou	<input type="checkbox"/>

Scheduled Appointments

Add/Edit Appointment

TESTPATIENT, ELLY
149 Sex: F DoB: 10/12/2012 Age on Appt Date: 7 yrs. 0 mos.

Tuesday, October 15, 2019

Appt text: TESTPATIENT, ELLY (216-555-1213 ID:149 DOB:10/12/2012) ~SICKVISIT, EST: Sore throat -- CLM

Appt reason: Sore throat

Appt type: SICKVISIT, EST Start time: 11:00 AM

Visit Templates

Encounter Template Editor

Template List

Template: ALLERGIC RHINITIS Appt type: SICKVISIT, EST

Category: Ears, Nose, Mouth, Throat

Author: 0

Visibility: Providers only

Location:

Finalize status:
 Providers only
 Any clinician
 None (archived)

Patient Chart Defaults

Patient Chart: ELLY TESTPATIENT (149) Sex: F DOB: 10/12/2012 Age: 7 yrs. 0 mos. Ins: AETNA PPO

Miscellaneous Notes

Default well visit type: SICKVISIT, EST

Default sick visit type:

Activity 2:

Review Visibility Settings



Scenario:

Patient Privacy is important to consider when preparing OP for the Portal. Patient charts must be reviewed to ensure the correct visibility level is selected on patient visits, medications, problems, etc.

- **Why?** Records with a visibility level of **Any Staff Member** are appropriate to be displayed on the Patient Portal.

Let's Get Started

- Some of the items that can have restricted visibility include:
 - **Global Settings:** Care Plans, Diagnostic Tests, Medication Favorites, Surveys
 - **Patient-Specific:** Allergies, Diagnostic Tests, Documents, Visits, Notes, Medications, Messages, Problem List items, Surveys
- Review where [visibility restrictions can be made](#) in OP

Reminder: Any Staff Member indicates the record can be seen on the portal!

Activity 3:

Archive Database Records



Scenario:

We want to archive database records to complete a wellness check on the database. Archiving records gives you the opportunity to take a large amount of data, based on a criteria, and archive it.

- **Why?** Much of the clinical data flow is dependent upon data being in a certain stage. For example, in order for a visit note to be displayed in the Patient Portal, it must be finalized.

Only an Administrator or staff member with permission: **Admin_Archive_Records** can archive DB records.



Let's Get Started

- Review [Data Clean-Up](#) and decide as a practice team how to complete this clean-up for your practice.

Navigate to the Archive Medical Records window: **Admin tab > Archive Records**

Takeaway Action Plan

Use what you have learned in today's webinar to complete the following:

- ❑ Run the Appointment Type cleanup SQLs and correct mismatched appointment types on scheduled appointments, visit templates, and as defaulted in patient charts.
- ❑ Review patient record visibility settings
- ❑ Perform Database Record cleanup

Resources

Help Center Articles:

- **Bookmark this!** [OP Patient Portal Learning Journey](#)
- [Appointment Type Cleanup for OP Patient Portal Readiness](#)
- [SQL: Invalid Appointment Types on Scheduled Appointments](#)
- [SQL: Invalid Appointment Types Associated to Visit Templates](#)
- [SQL: Invalid Appointment Type Default in Patient Chart](#)
- [Privacy Constraints \(Visibility Settings\)](#)
- [Set Visibility Levels](#)
- [OP Data Cleanup](#)

Have a Question?

- Type it into the **Questions** box
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The OP Way

We are committed to providing the best **pediatric technology, resources, and community** to drive practice success and quality patient outcomes.

Our Mission: Improving Health Through Technology

