



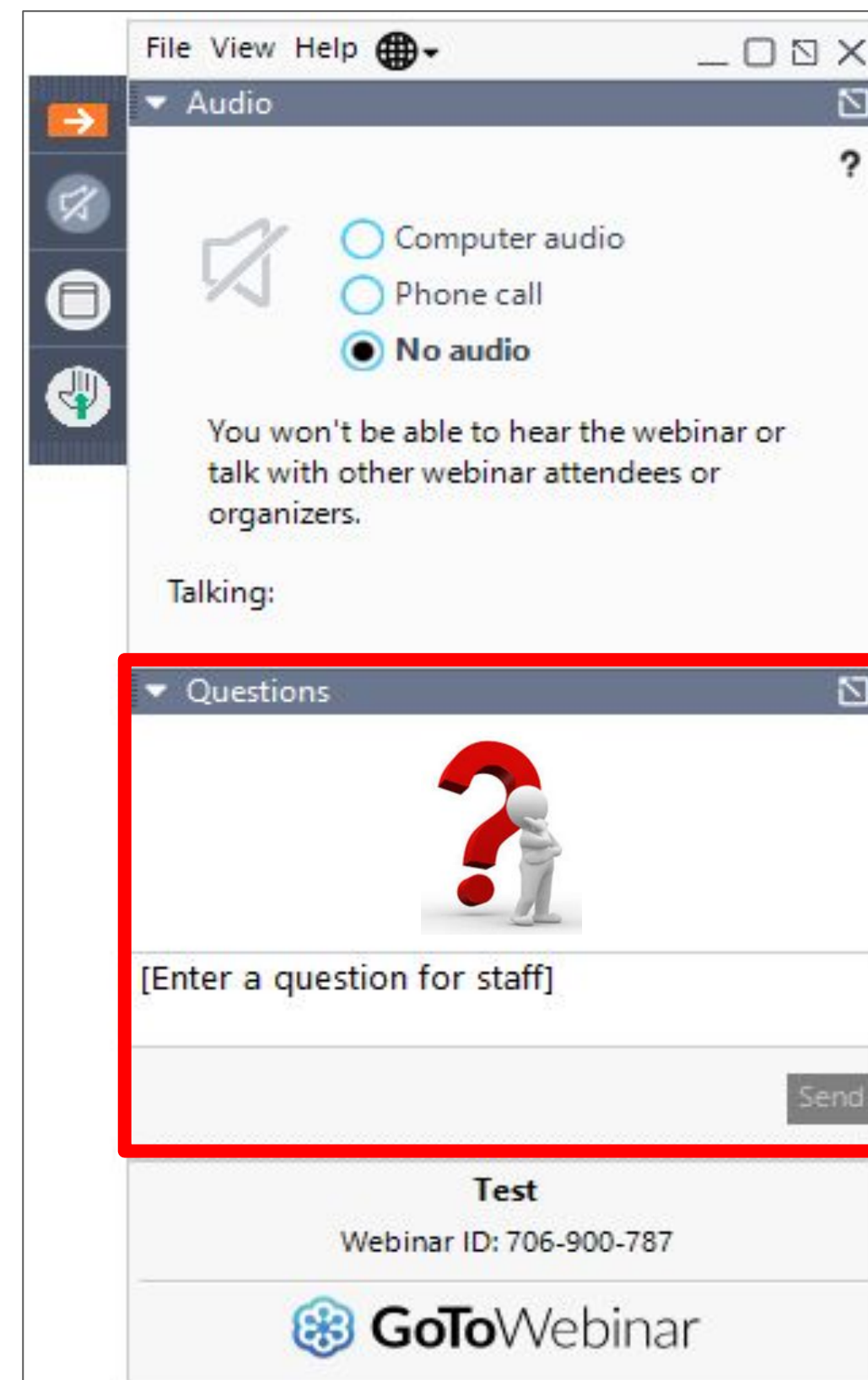
Data Integrity and the OP Patient Portal

Part 1
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.



Objectives

In this session, you will learn:

- What Data Integrity means, why it is important, and how it impacts users and our patients.
- How to prepare OP for the new OP Patient Portal, including the review of:
 - Staff and Provider records in OP
 - Patient Basic Information
 - Patient Family Contact Information
- How to validate your active patient list
- How to cross-map SNOMED codes

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.

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.

Data Integrity

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.

Activity 1:

Review Staff and Provider Records for Location



Scenario:

Ensure the Staff and Provider data flows accurately and completely to IntelliChart.

- **Why?** For Staff and Provider data to flow cleanly to IntelliChart, each Staff and Provider record must include a Location.

This activity accesses the Staff/Provider Directory. Only an Administrator or staff member with permission can access this.

Let's Get Started

Navigate to the Staff Directory in OP: **Practice Management tab > Staff/Providers**



Resource Diagram: Staff/Provider Locations

1 Navigate to the Staff Directory.

2 Select the All checkbox.

3 Review the Location(s) for each Staff/Provider, and add if missing.

4 Save your changes.

The screenshot shows the 'Staff Directory' application window. On the left is a list of staff members with columns for Staff Name, Initials, and ID. The right pane shows details for 'SLOANE KNOX, MD'. The 'Location(s)' table is highlighted with a red box and contains the text '<No data to display>'. The 'All' checkbox under the 'Location' filter is checked. The 'Save your changes' button is located at the bottom of the staff list.

Staff Name	Initials	ID
SLOANE KNOX, MD	SJK	305
CORA NOBLE, MD	CAN	681
WARNER, MD	CLM	1839
Stewart, MI	MKS	2029
GUY, NP	AUG	1841
CINDY DODSON	CAM	1874
SAWYER SHORT	SAW	1899
IVES MOSS	IVM	1845
DEVON ALBERT	DEV	1835
OLIVE L. LIVINGSTON	AS	1824
DEMO DOCTOR	DD9	107
An Administrator	SAD	102
Electronic Transmission	SED	660
Web Portal User	SWP	100
NURSE SCHEDULE	NS	2007
MICKEY MOUSE	MMO	2009
ADMIN PERSON	ADM	2010
ANNIE BARNES	ANB	2012
MANDY JONES	MAJ	2016
FLU CLINIC	FLU	2020
Holly A. Bygolly, NP	HBG	2023
CINDY REITER	CLR	2028
WILLIAM J. MAYFIELD, N	WJM	2030
Fax Server	SFX	-6
BROOKLYN JOHNSTON	SSM	1095
WILLA REYES, NP	WR	1880
SIERRA MCCALL	MLA	652

Basic Info | Data Visibility | Provider Info | Practice Info | IIS | Lab Links | e-Pre

First/middle name: SLOANE
Last name/suffix: KNOX MD
Initials: SJK Staff ID: 305 List#: 1
Login name: SJK Security Access
Colloquial name: Doctor Knox

Department(s)
Add staff to a dept

Location(s)
Add staff to a location
<No data to display>

Team(s)
<No data to display>

Display color: cTeal
Clinical level: Full provider, has billing credentials
Standard medical records visibility: Physicians only
Emergency medical records visibility: Author Only
Backup log manager status: No backup or archive responsibility
Phrase constructor: OP Default Settings
Printer preference: OP Default Settings

Activity 2:

Review Patient Basic Info for PCP and Medical Home



Scenario:

Ensure all active patients have a Primary Care Provider (PCP) and Medical Home selected in their chart.

- **Why?** For patient demographic data to flow cleanly to IntelliChart, each patient chart must include a PCP and Medical Home.

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

Let's Get Started

Navigate to the [Active Patient PCP and Medical Home SQL](#).

Resource Diagram: PCP and Medical Home

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

1 No privacy restrictions

Navigate to and open the patient chart.

2 Click Basic Information.

3 Enter the missing PCP or Medical Home.

4 Save your changes.

Demographics

Patient number: 149

Last / Suffix: TESTPATIENT

First: ELLY

Middle:

Birth date: 10/12/2012

Sex: Female

Gender identity: Unknown

Orientation: Unknown

Language: ENGLISH

Alternate ID:

Alt last name:

Alt first name:

Age:

Ethnicity:

Race(s):

Details:

Primary address: 123 ABC STREET

CLEVELAND OH 44130

County/country: UNITED STA

Primary phone: 216-555-1213

Day phone:

Cell phone:

Email address:

Emerg. contact:

Status: Active as of: 6/13/2019

Register date: 06/13/2019

Last visit: 07/25/2019

Last update: 06/13/2019 08:33 AM by: 305

Patient Preferred Contact Methods

Recalls:

General:

VFC eligibility: NOT ELIGIBLE

Medical home: Primary Location

PCP: 681 CORA NOEL

Team:

Risk group: not applicable

Photo ID

Activity 3:

Review Family Contacts for accuracy and completeness



Scenario:

Ensure that all Contact information is complete.

- **Why?** Each patient's Family Contacts should be reviewed for the following:
 - Primary Phone
 - Cell Phone
 - Valid Email address (no spaces, etc.)
 - Preferred Method of Contact for Reminders
 - Role/Reason: Mother, Father, or Legal Guardian *For OP Notify
 - Authority
 - Resides with checkbox

Let's Get Started

Navigate to the Family Contacts in the Patient Chart: **Clinical, Practice Management, or Billing tab > Patient Chart button > Family Contacts**

Resource Diagram: Family Contact Info

1 Patient Chart: SARAH TEST (103) Sex: F DOB: 08/02/2014 Age: 5 yrs. 3 mos. Ins: GUARDIAN

2 No privacy restrictions
☐ Include confidential
DEMOGRAPHICS
Basic Information
Notes/Addl Info
Privacy/Sharing
Family Contacts
Clinical Contacts
Consent Forms
ACCOUNT
Summary
Insurance
Claims
Charges
Payments
Credits
Statements
Disclosures
COMMUNICATION
Messages
Tasks
General Letters
REPORTS
Documents
Medical Records

3

Family Contacts

#	Name	Role/Reason	Authority	Res?	Start Date	End Date	Portal
1	DONALD TEST	Father	Exclusive	<input checked="" type="checkbox"/>			None

Fix Sort #

Last name: TEST
First name: DONALD
SSN:
Employee:
Occupation:
Notes:
Nickname:
Birth date:
Language:
Address: 123 HORSHAM RD
City: HORSHAM PA 19044
Country: UNITED STATES
Primary phone: 215-222-3456
Work phone: - -
Cell phone: 215-222-7890
Fax: - -
Home email: sarahasdad@email.com
Work email:
Preferred Contact Methods
Recalls:
General:
Portal:
Reminders: Text to Cell

4 Save Cancel

Save your changes.

Review the following fields and make changes as needed:

- Primary phone
- Cell phone
- Email address
- Preferred Method of Contact for Reminders
- Role/Reason (Mother, Father, or Legal Guardian) *For OP Notify
- Authority
- Resides with checkbox

Activity 4:

Validate active patient list by archiving patient records



Scenario:

Inactivate patients in bulk using the Archive Medical Records tool.

- **Why?** As part of Data Integrity, we want to take this clean-up opportunity to inactivate patients who have aged out of the practice or have not been seen in a specific timeframe.

Let's Get Started

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

Resource Diagram: Inactivate Patients

1 Navigate to the Database Cleanup tab of the Archive Medical Records window.

2 Click the **Register** tab.

3 Select the appropriate radio button and set criteria:
- Inactivate patients older than _ years.
- Inactivate patients not seen in _ months.

4 Click to inactivate patients who meet the set criteria.

The screenshot shows the 'Archive Medical Records' window. The 'Database Cleanup' tab is selected. Within this tab, the 'Register' sub-tab is highlighted with a red box. Below the sub-tabs, there are two radio button options for inactivation criteria, each with a dropdown menu for setting the time period. The first option is 'Inactivate any patient older than age: 0 Years' and the second is 'Inactivate any patient who hasn't had a sick or well visit in the past x months: 0 Months'. A 'Set Inactive' button is located at the bottom right of the criteria section.

A Note about Patient Status

Patients with one of the following statuses selected in their chart will **not** be sent to IntelliChart:

- Inactive
- Transferred
- Discharged
- Deceased
- Call Coverage
- Visitor
- Wait List
- Merged

The screenshot shows a patient chart window for MARY TESTPATIENT (99). The 'Demographics' tab is selected. The 'Status' field is highlighted with a red box and set to 'Active' as of '5/16/2000'. Other fields include Patient number: 99, Last / Suffix: TESTPATIENT, First: MARY, Middle: , Birth date: 5/16/2015, Sex: Female, Gender identity: Unknown, Orientation: Unknown, Language: ENGLISH, Primary address: 123 ABC STREET, CLEVELAND OH 44130, County/country: UNITED STA, Alternate ID: , Alt last name: , Alt first name: , Age: 4 yrs. 6 mos., Ethnicity: , Race(s): , Register date: 05/16/2000, Last visit: 05/13/2019, Last update: 05/13/2019 12:24 PM by: 305.

Patients with any other status, including ones that the practice created, **will** be sent to IntelliChart.

To send a patient with one of the statuses above to IntelliChart, simply change the status in the patient chart:
Clinical, Practice Management, or Billing tab > Patient Chart button > Basic Information > Status field



Activity 5:

Map SNOMED Codes for Diagnoses



Scenario:

Ensure educational handouts are displayed on the portal.

- **Why?** All Diagnosis Codes in the Assessment tab must be mapped to a SNOMED code to properly link educational handouts.

Let's Get Started

Navigate to Encounter Template Editor: **Clinical tab > Encounter Templates**

Takeaway Action Plan

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

- ❑ Assign each Staff member or Provider to at least one location in the Staff Directory
- ❑ Run the Active Patient with PCP and Medical Home SQL to identify patient charts that are missing a PCP and/or Medical Home. Add the missing data to those charts.
- ❑ Deactivate patients who have either reached a specified age or have not been seen for a visit in a specified time period.
- ❑ Cross-map diagnosis codes on Well Visit and Encounter templates, and review other diagnosis codes for which educational handouts may be provided.
- ❑ Review Family Contact records to ensure all contact records are accurate and completely filled out.

Resources

Help Center Articles:

- **Bookmark this!** [OP Patient Portal Learning Journey](#)
- [Adding Staff into the Staff Directory](#)
- [Deactivating a User Account](#)
- [Register a New Patient](#)
- [SQL: Active Patients with PCP and Medical Home](#)
- [InteliChart: OP Patient Portal Family Contact](#)
- [Adding Contacts to a Patient's Record](#)
- [OP Data Cleanup](#)
- [Cross Mapping SNOMED Codes](#)
- [How do I add a SNOMED Code to a template?](#)

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***

