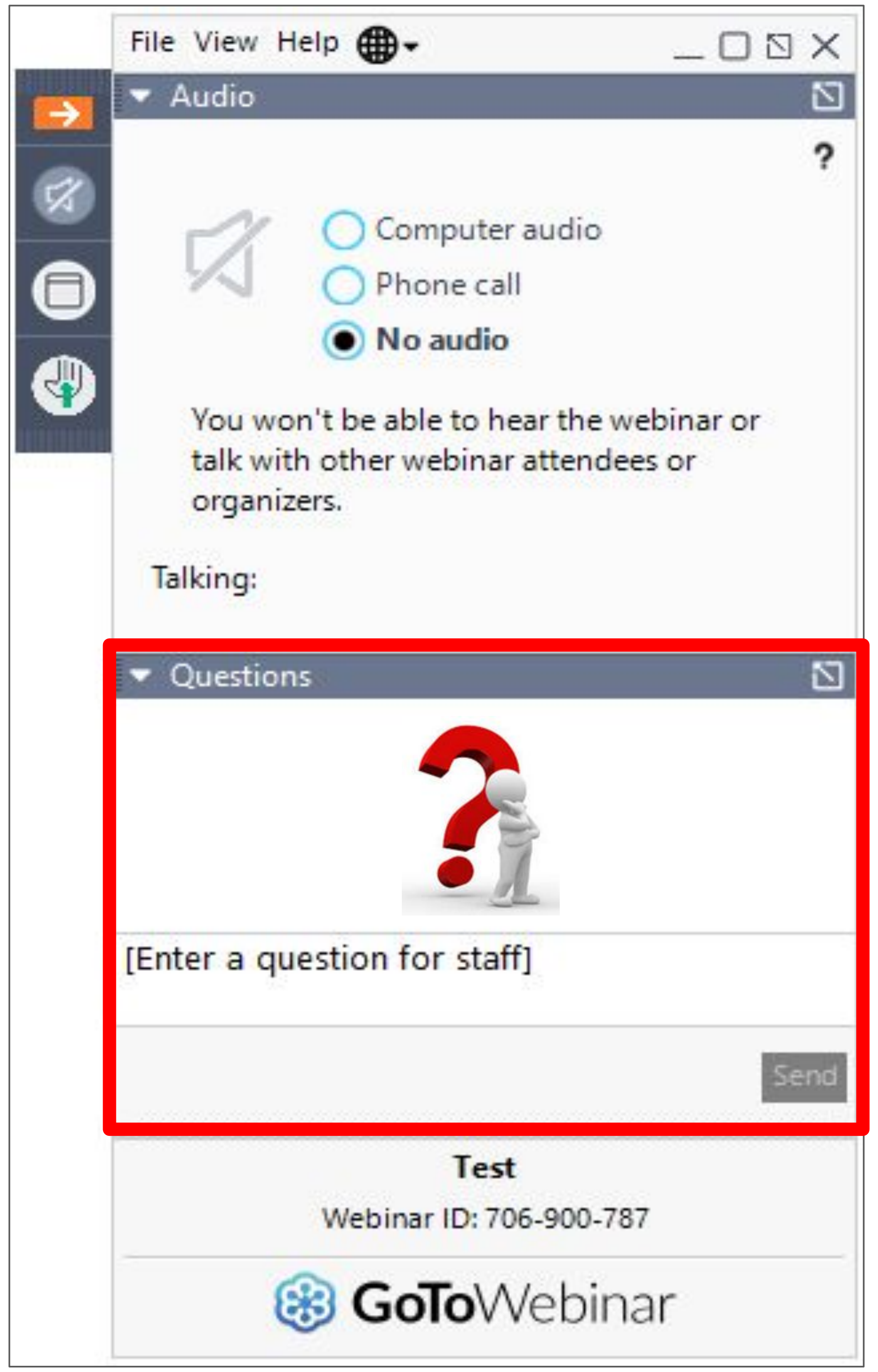
Data Integrity and the OP Patient Portal

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 InteliChart.

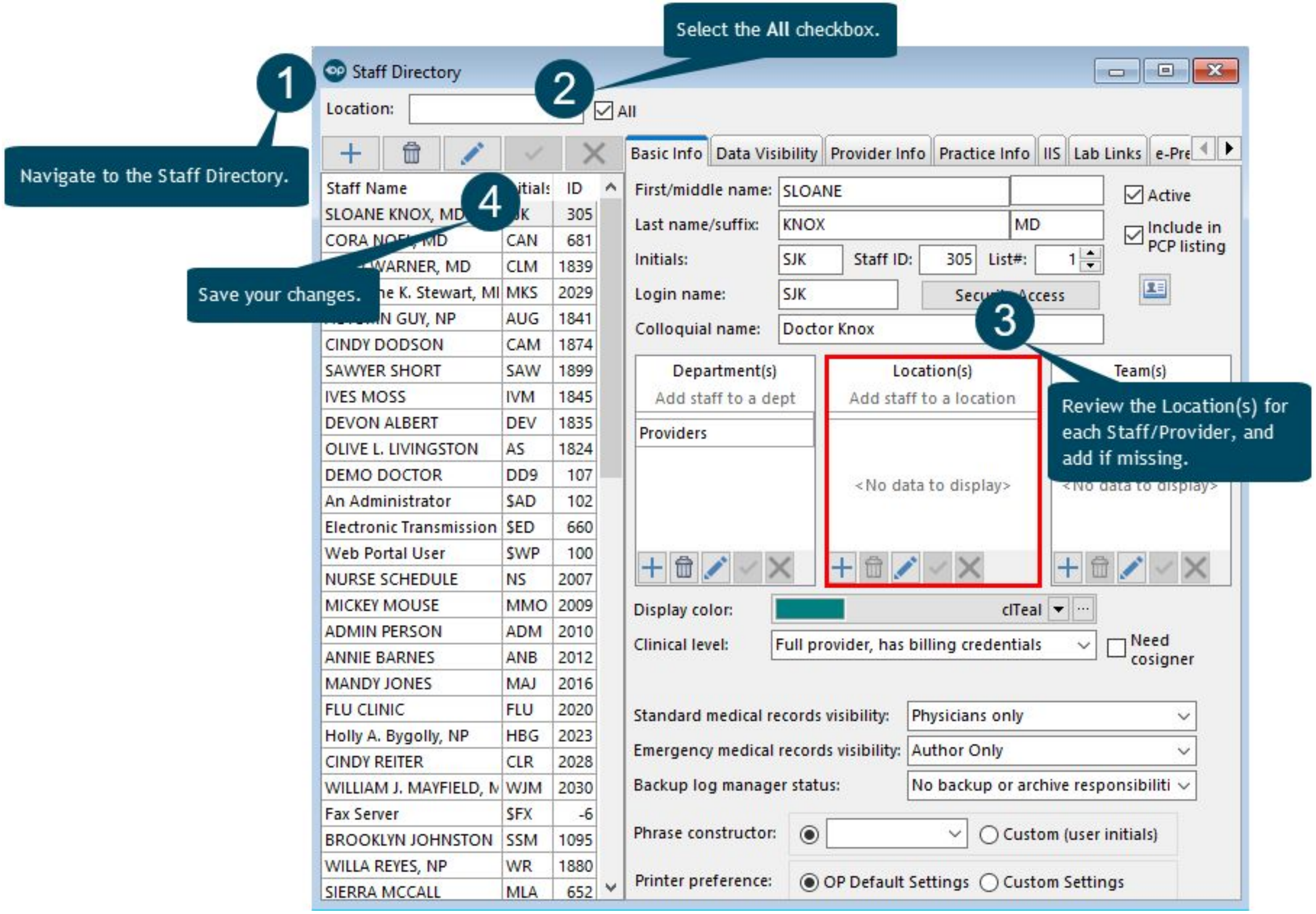
- **Why?** For Staff and Provider data to flow cleanly to InteliChart, each Staff and Provider record must include a Location.

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



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.

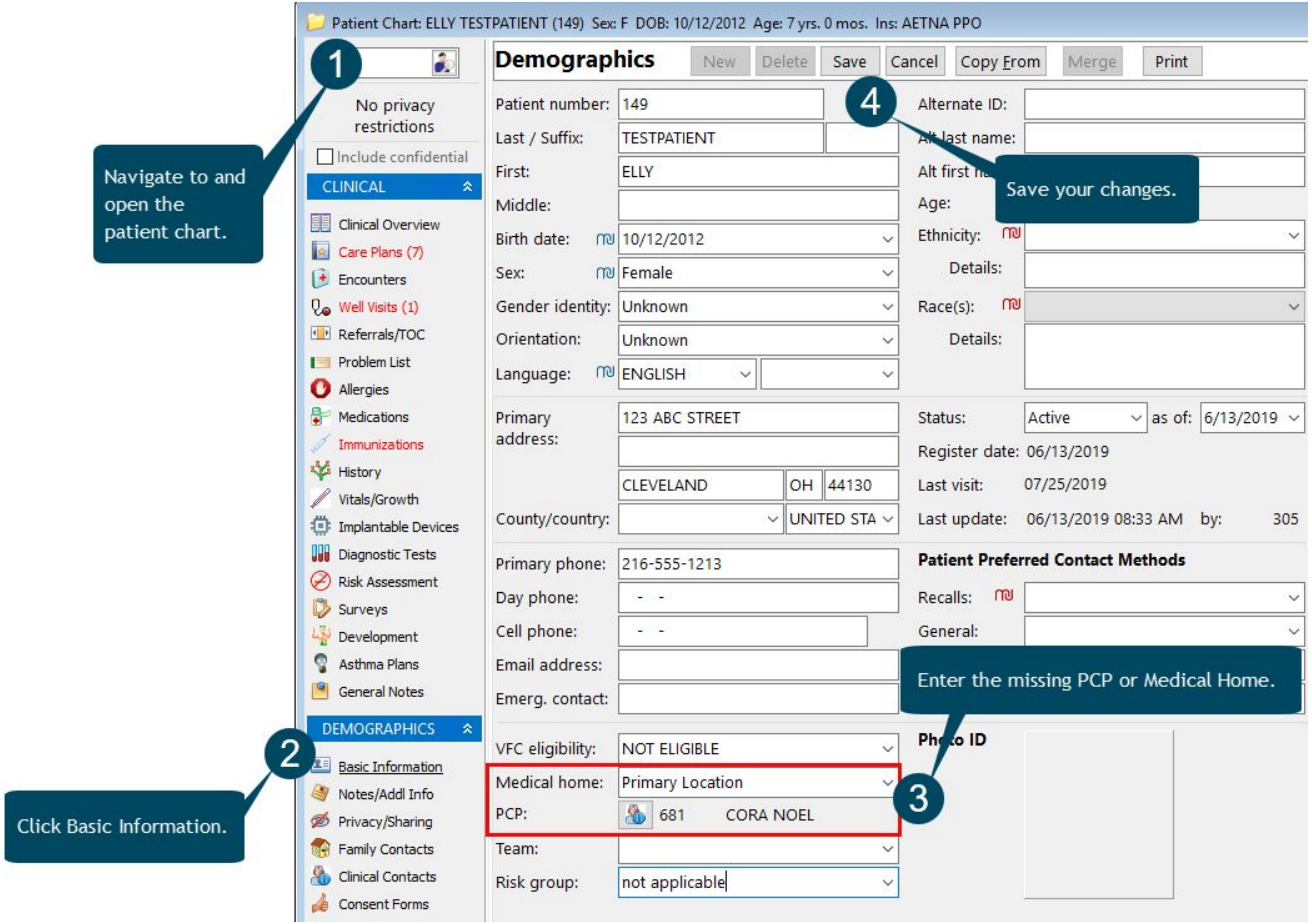
- **Why?** For patient demographic data to flow cleanly to InteliChart, each patient chart must include a PCP and Medical Home.

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



Activity 3:

Review Family Contacts for accuracy and completeness

Scenario:

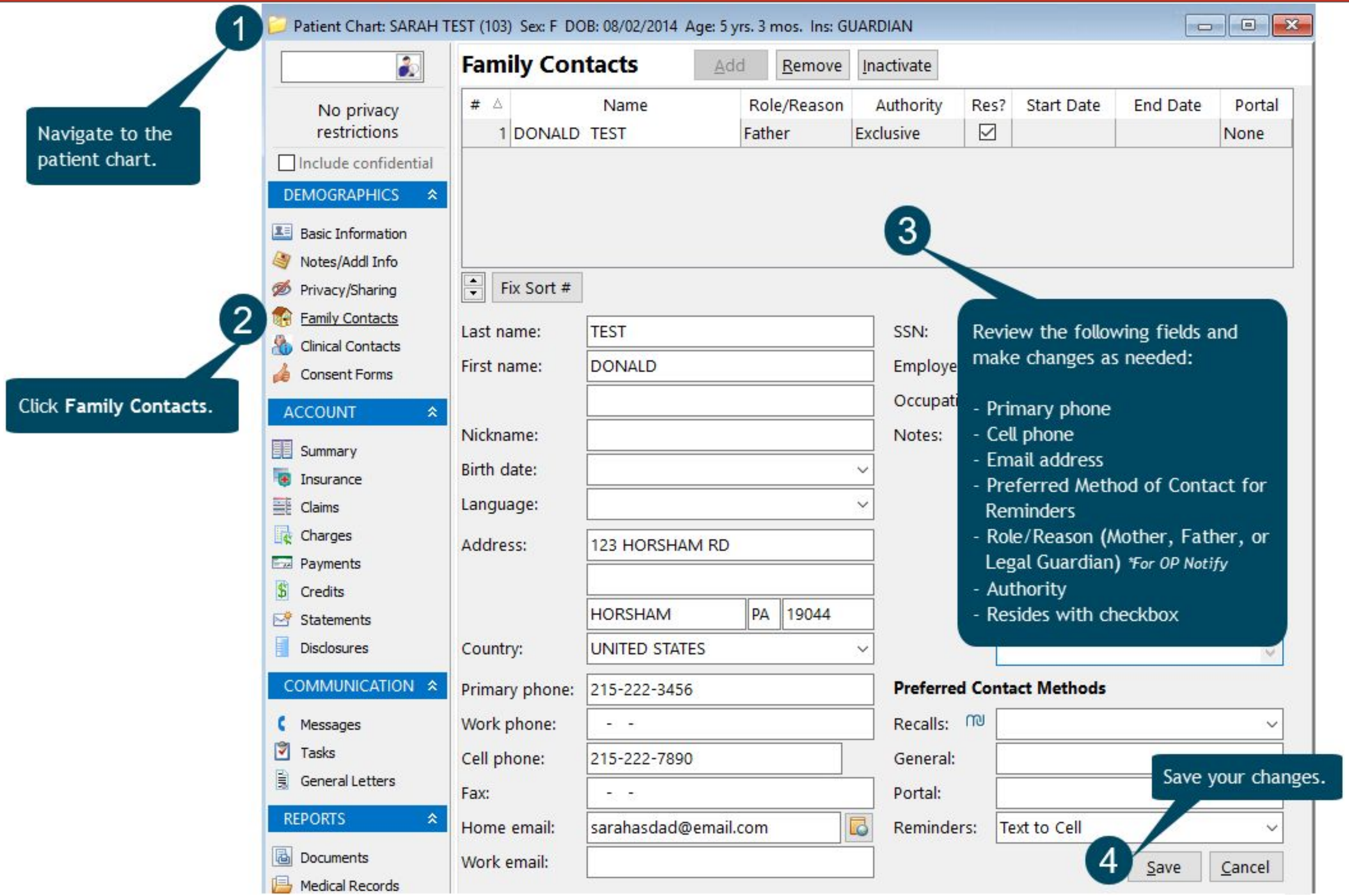
Ensure that all Contact information is complete.

- **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



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

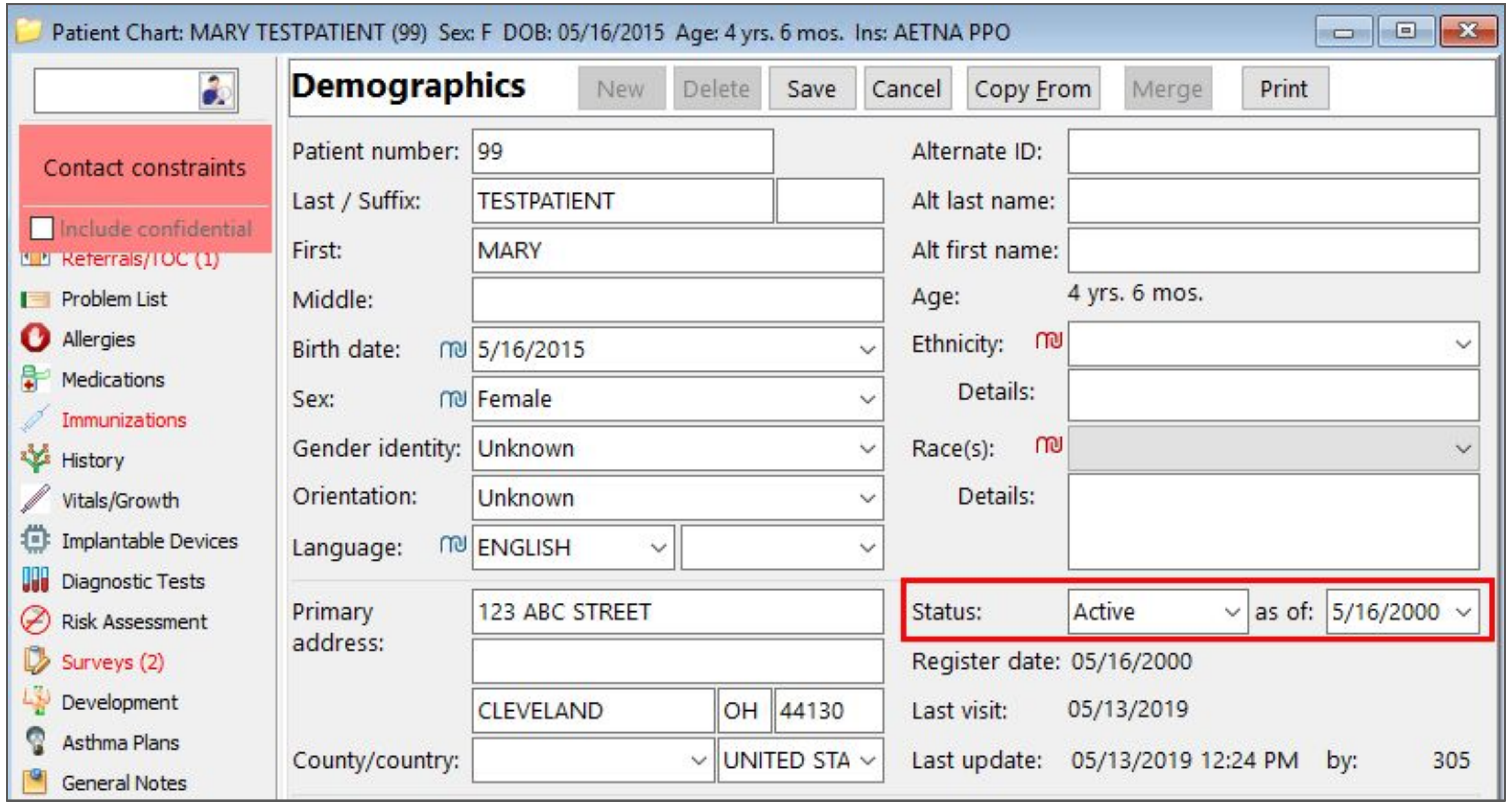
Navigate to Archive Medical Records: **Admin tab > Archive Records**

Resource Diagram: Inactivate Patients

A Note about Patient Status

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

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



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

To send a patient with one of the statuses above to InteliChart, 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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Improving Health Through Technology

Office Practicum

The OP Way

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