Patient Alerts

Creating Timely Patient Specific Alerts

Speaker

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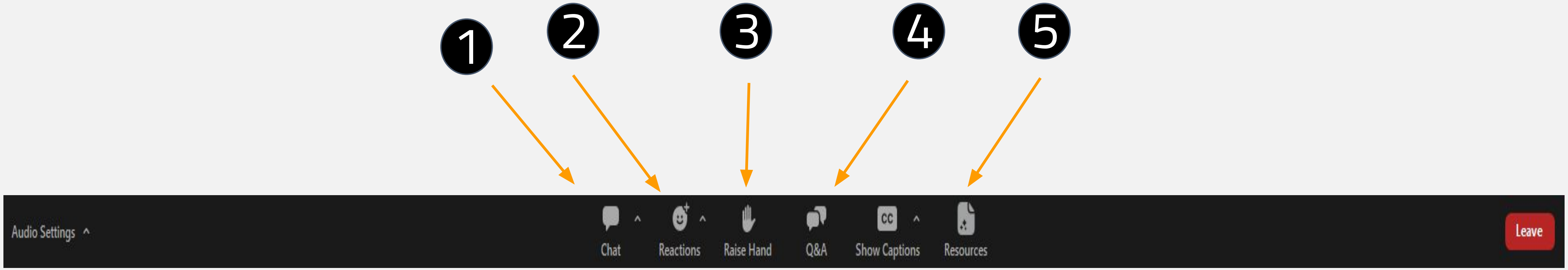
Director of Training

Navigating Zoom



All attendees will be muted during this webinar.

1. **Chat** - Please enter additional team members names, who have not registered for the webinar.
2. **Reactions** - Use this to react with smile, like thumbs up, or celebrate emoji.
3. **Raise Hand** - Attendees can raise hand to alert trainer you have a question. Please add your question to the Q&A tab.
4. **Q&A** - Send questions throughout the webinar to organizer and panelists
5. **Resources** - Are available to download during the session

Why Patient Alerts?

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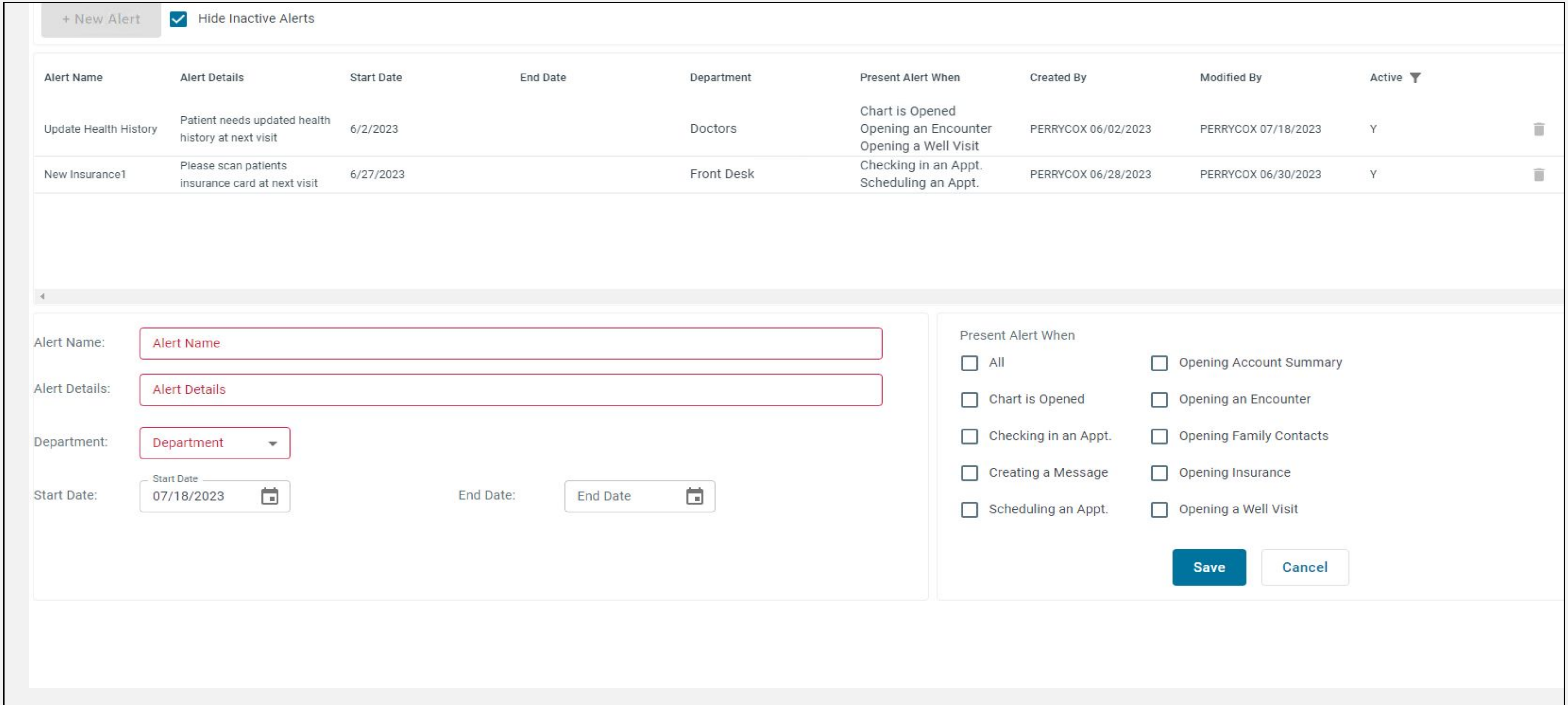
Problem:
Unable to create patient specific alerts that would be visible when opening the chart and something more robust than…
@@ in Billing and Misc Notes.

Solution:
Patient Alerts were created

Patient Alerts Overview



Objectives

- At the end of this webinar you will be able to:
  - Use Patient Alerts
  - Navigate Patient Alerts
  - Set up Access
  - Activate Patient Alerts
  - Create Patient Alerts

Security Permissions

Alerts_Access:
Allows access to the alerts module found under Communication in the patient's chart

Alerts_Complete:
Allows you to complete the alert when presented to you within your workflow

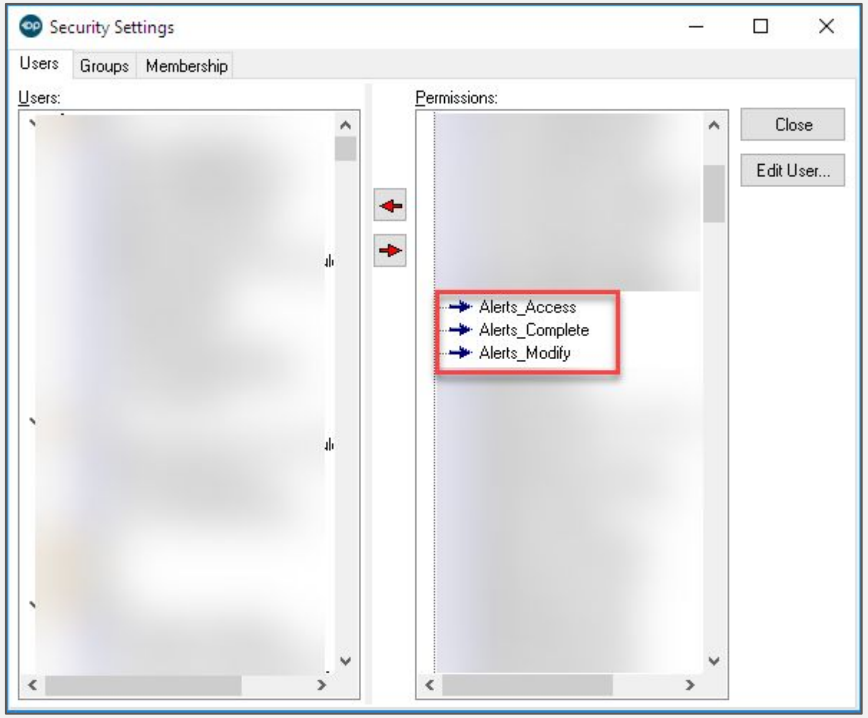
Alerts_Modify:
Allows you to create, update, and delete alerts

💡 Create a permission group or groups
.
Considerations:

- Alerts View / Complete
  - Alerts_Access
  - Alerts_Complete
- Alerts Admin
  - Alerts_Access
  - Alerts_Complete
  - Alerts_Modify

🧍 Who should have the ability to create alerts?
Considerations:

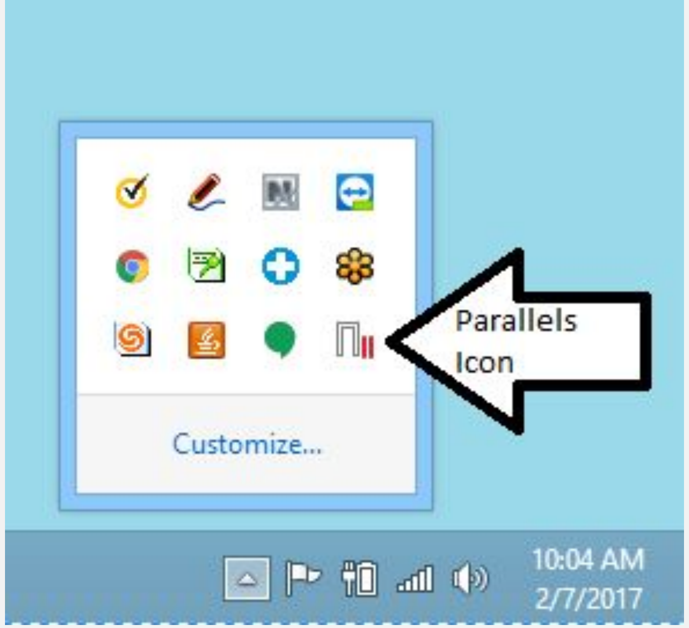
- Leadership roles in each functional area

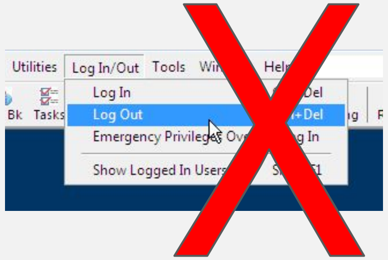


Activity 1: Permissions

Log off all Sessions

Find the Parallels icon in your taskbar (bottom right corner of your screen where you find the time and date). Right-click the Parallels icon and select Log Off All Sessions.





Logging out of OP is **not** the same as doing a Log Off All Sessions.

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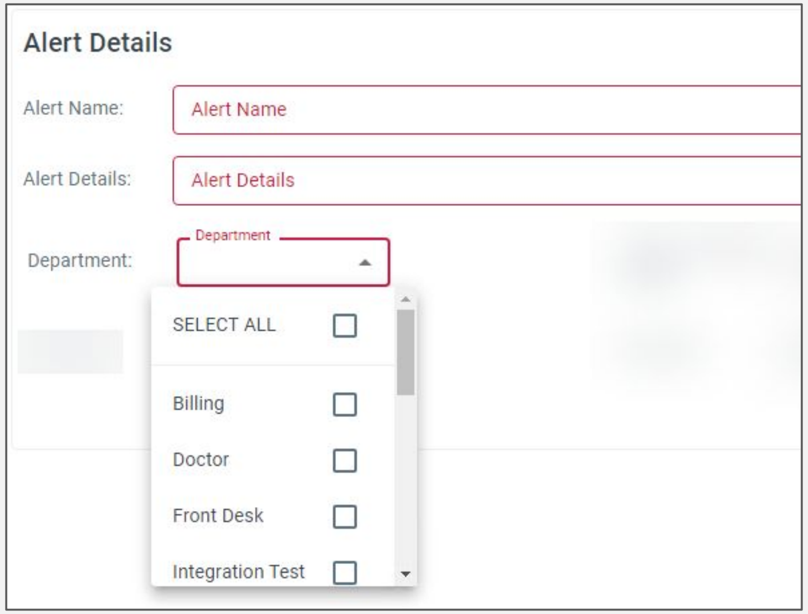
Types of Alerts

Department Use Cases- Tips and Tricks

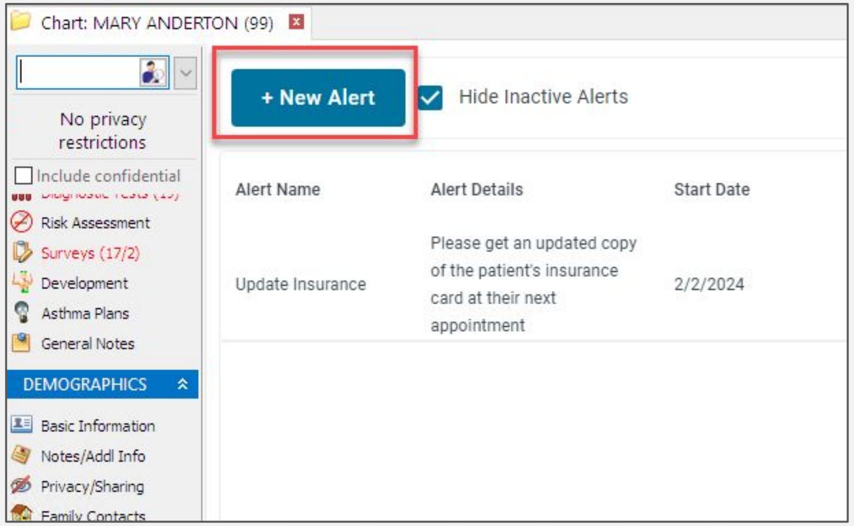


Department Use Cases by Dr. Suzanne Berman (Shared via Listserv)

- **All Departments:** for a true APB type situation
  - eg. when chart is opened or creating a message "We have been trying for weeks to reach mom about X! Next time she calls...."
- **Multiple Departments** (usually reception + billing OR clinicians + nurses) for clerical vs clinical needs -- "Mom needs to sign updated XYZ form" "Hep C RNA next time kid comes in"
- **One department** - like the above...
  - Often clinicians only if it needs to be a medical conversation with the family "Kid is candidate for PCV20 for high risk, talk to mom"
- 💡**One person-as-their-own-department**
  - You may have a clinician who is like Reminder Rita.
    - She loves putting lots of "sticky notes" on the chart for herself to remind herself about things. That way she has multiple things front of mind when she sees a kid. She loves it! However, because historically she was putting these notes-to-self in Tasks and the General Notes, it got to the point where the other providers (one in particular, who likes her charts clean lean and mean) was going bonkers.
    - So we made a Rita-Only department (of 1.) She can now make all her own popups and messages and reminders and so on and address them to her own Department of One so NO ONE ELSE HAS TO SEE THEM. It has led to great joy, peace, harmony, and prosperity :)

Creating a Patient Alert

- Requires Alerts_Modify permission
- Click + New Alert
- Enter required fields
- Click Save
- Missing fields will display in Red text below Save and prevent you from saving alert



Activity 2:

Alert Type: Alert for all Departments

In Workflow Notification

Acknowledgement	Suppressing	Completing
Clicking OK	Check Suppress	Checking Complete
Pop-up presents when action is performed again	Suppresses alert until log out and back into OP	Enters an end date of today + makes alert inactive

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Activity 3:

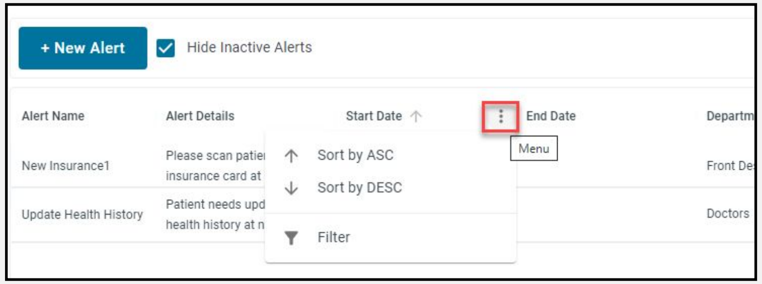
Alert Type: Multiple Departments

Activity 4:

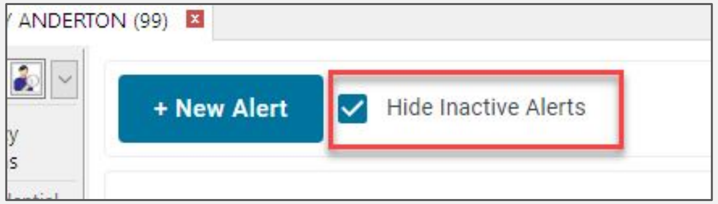
Alert Type: One Department

Managing Patient Alerts

Viewing Alerts
- Sorting on any column
- Filtering
  - Hover over column
  - Click ellipses



Inactivating Alerts
- Alerts will present until an End Date is entered
- Alerts will no longer present ON or AFTER the end date
- To view inactive alerts, uncheck Hide Inactive Alerts



Deleting Alerts
- Permanently removes from system
- Click Trash Can in the grid next to alert

Inactivating vs. Deleting Alerts

BOTH actions requires Alerts_Modify permission

Deleting Alerts

- Permanently removes the alert record
- Only record of it existing is in the audit trail

Inactivating Alerts

- Allows you to keep record of the alert
- Can re-use again but removing end date

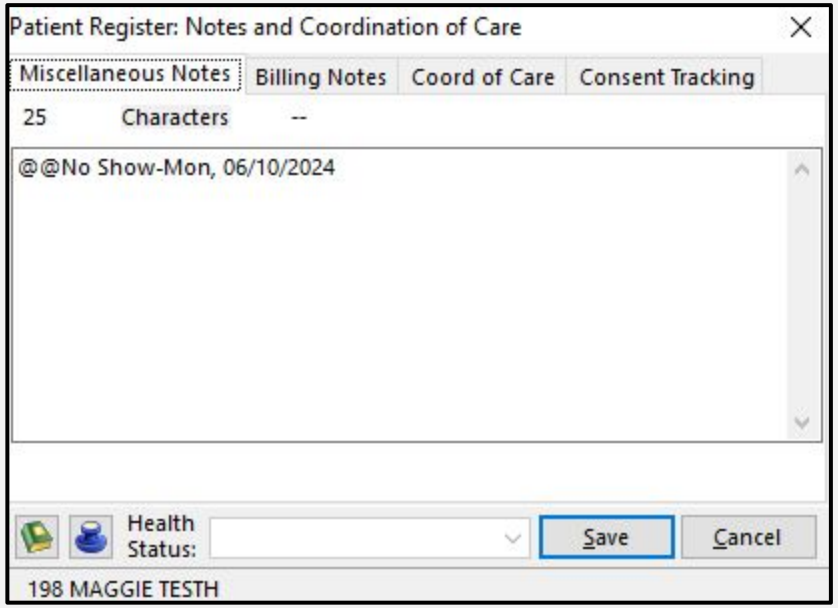
⭐Bonus Activity 5 ⭐

Alert Type: One Person Department

But what about @@?

@@ in Miscellaneous and Billing Notes Notes are still functional for cross functional teams to create a pop up alert, without all the the admin access of Alerts_Modify

Alerts_Modify:
Allows you to create, update, and delete alerts

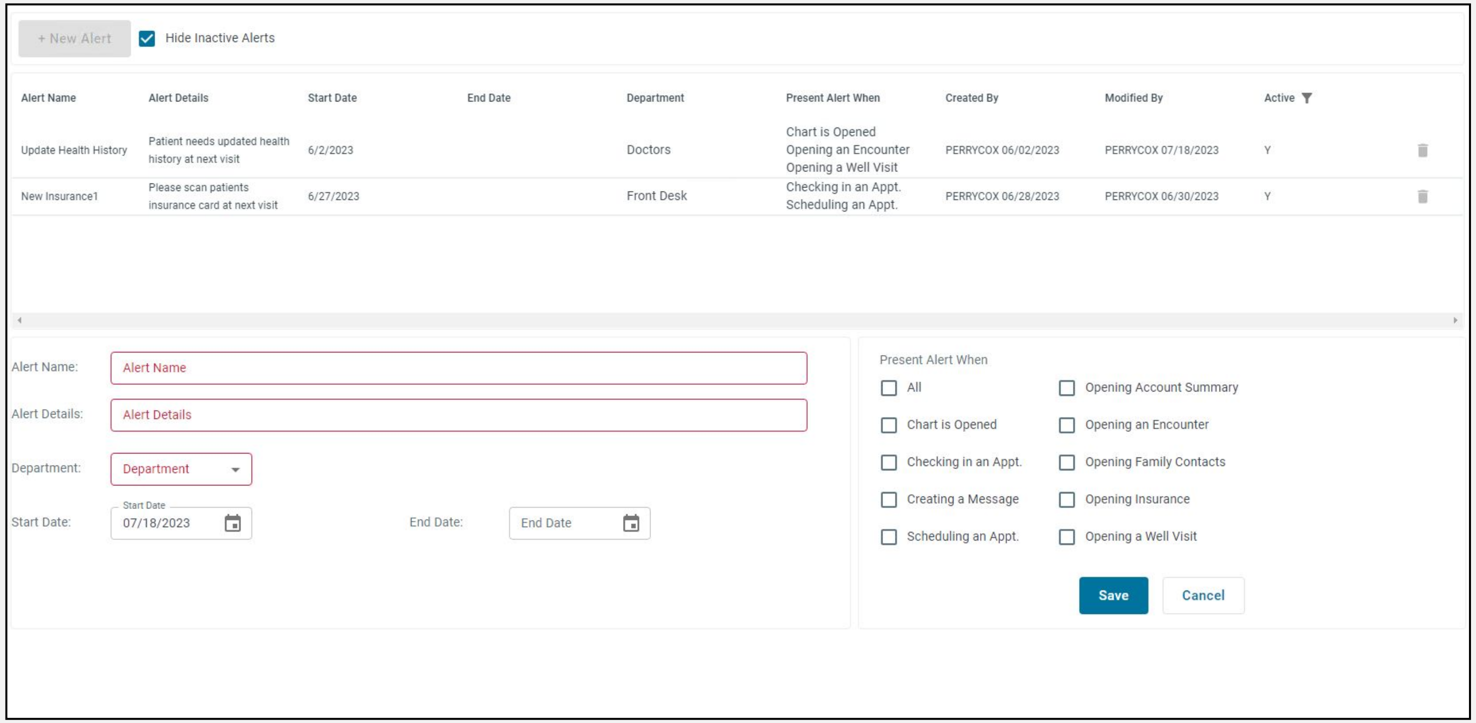


Appendix Resources

Accessing Alert Setup

Navigation:

Practice Management > Patient Chart > Alert Setup under Communications

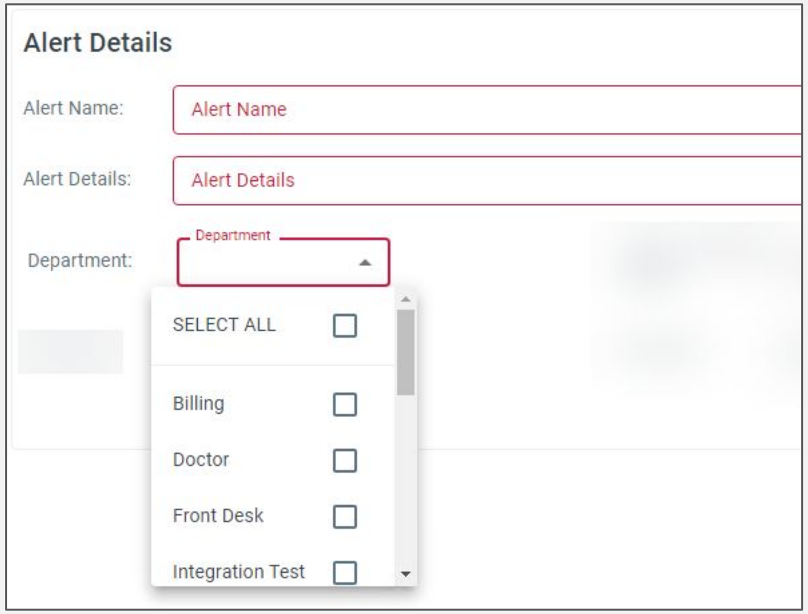


Alert Criteria

Alert Name
- Required field
- Holds up to 40 characters

Alert Description
- Required field
- This is what displays to the users
- Holds up to 250 characters

Department
- Required
- Multi-select option
- Drives what staff members see the alert



Alert Criteria

Start Date

- Required
- Defaults to today

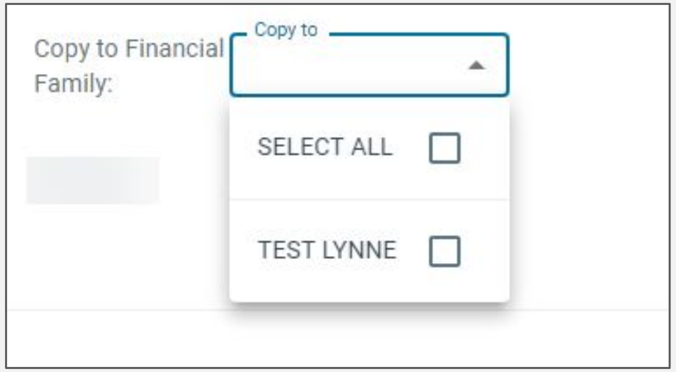
End Date

- Optional
- Makes alert inactive

Alert Criteria

Copy to Financial Family (Optional field)

- Only displays when patient has financial family
- Multi-select option
- Contains all siblings with the same financial guarantor
- Copying an alert only available when creating an alert
- No linkage - once copied to sibling it becomes an independent alert



Alert Criteria

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Present Alert When

- Required
- Specifies where in the workflow the user will see the alert
- Multi-select

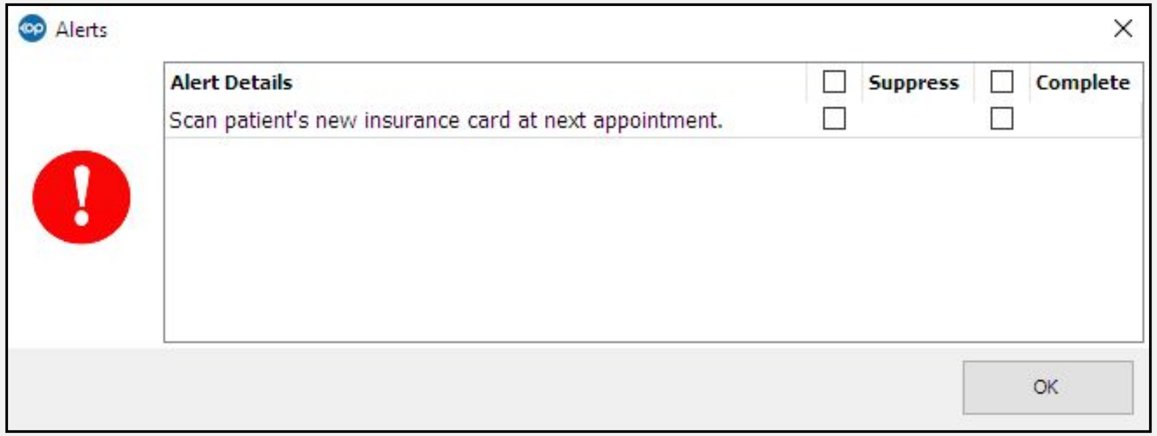
Present Alert When:

- [ ] All
- [ ] Chart is Opened
- [ ] Checking in an Appt.
- [ ] Creating a Message
- [ ] Scheduling an Appt.
- [ ] Opening Account Summary
- [ ] Opening an Encounter
- [ ] Opening Family Contacts
- [ ] Opening Insurance
- [ ] Opening a Well Visit

In Workflow Notification

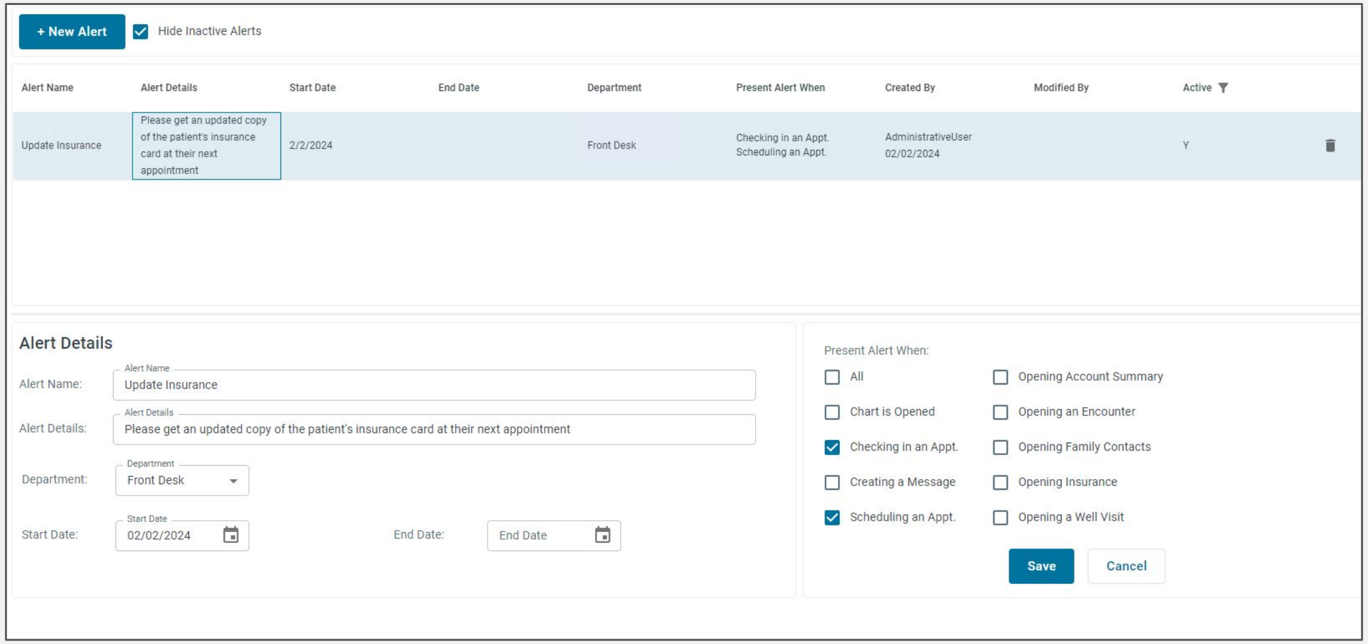
After an alert is created for a patient, when you perform the action that was specified in the **Present Alert When** section, a pop-up will appear on the screen.

Note: Pop-up will contain all alerts set to appear upon that action



Modifying a Patient Alert

- Requires Alerts_Modify permission
- Select an alert from grid
- Make changes
- Click Save



Q&A

Help Center Resources

- Patient Alerts Overview and Permissions
- Alert Criteria
- Create, Modify and Delete Alerts
- In Workflow Notifications for Alerts
- Audit Log Tracking for Alerts