



The New Journey

How Electronic Health Records Can Support Patient Activation

Virna Little, PsyD, LCSW-r, SAP, CCM
The Institute for Family Health

Patient Centered Care

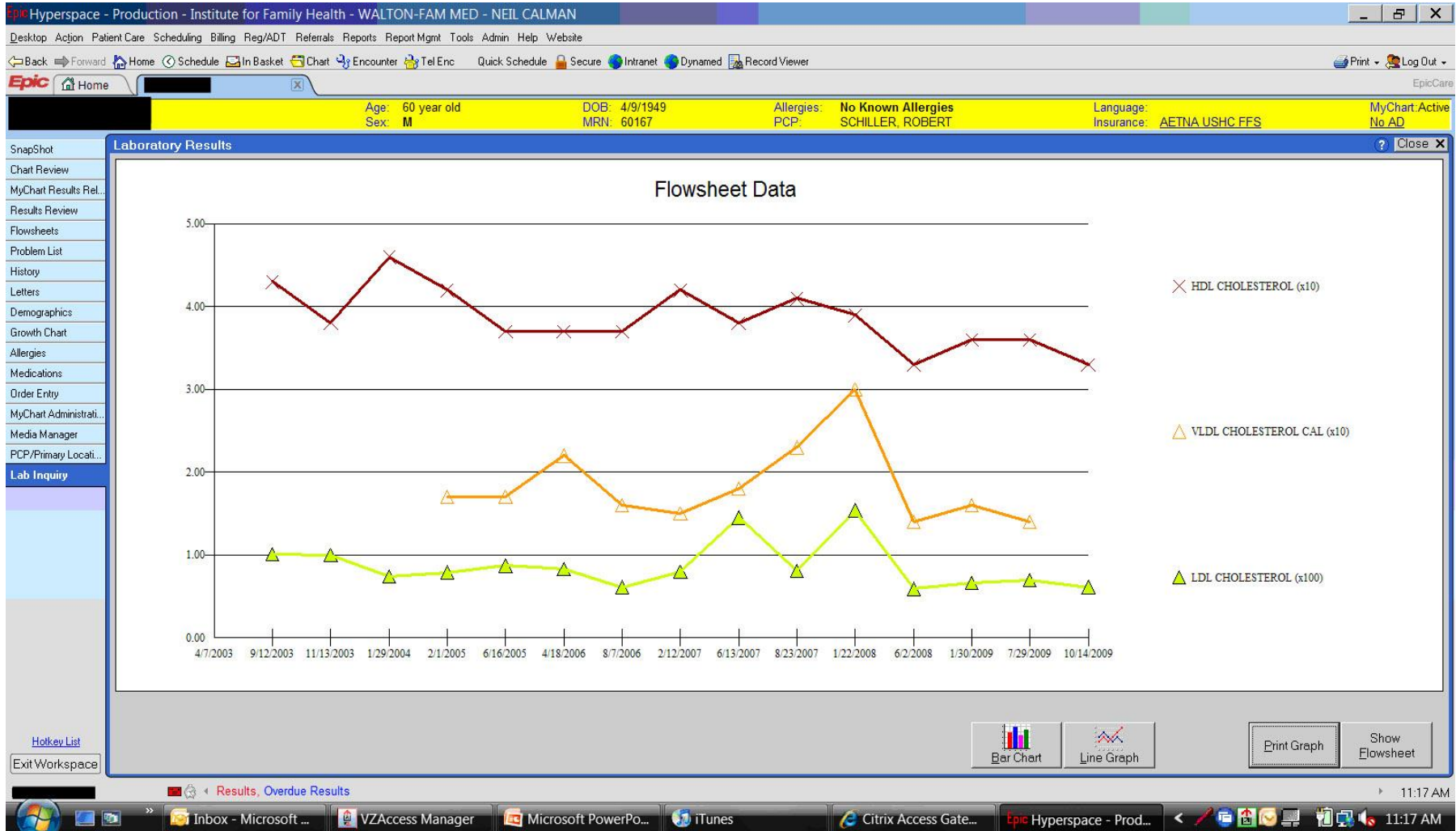
- Technology opens the door for engagement
- Technology changes practice
 - Use of portals
 - Concurrent Documentation
 - Patient Centered Documentation
 - Longitudinal Care Planning
 - Care Coordination
 - Enhanced access



EMRs in the therapy session can be used to engage patients



Review progress with patients



Technology Creates New Opportunities

- Patient engagement
- Care Networks
- Continuity
- Longitudinal Care Planning

A Patient Journey.....

A patient comes into a homeless soup kitchen .
Patient is disheveled, has not been caring for his diabetes and reports having relapsed on alcohol.
The staff go into the IFH portal to make an appt for the patient to see the medical and social work team next door

DIRECT SCHEDULING

Zztest, Zoe

Age: 59 year old DOB: 2/14/1952 Allergies: Penicillins INS: SLIDING FEE MyChart: Inactive
Sex: F MRN: 1078018 PCP: ZZTEST, MD Alert: HM Overdue or Due Soon

Clinical Review

- SnapShot
- Chart Review
- Results Review
- Flowsheets
- Allergies
- Problem List
- Medications
- Histories
- Growth Charts
- Upload Document

Patient Profile

Demographics

Referrals

- Referral by Member
- Referral by Provider

Scheduling

Quick Appt

- Upcoming
- Appointments

Logged in as:

LINK, DANREF

Make Appointment

[View More Times](#)

Select the appointment's start time from below to schedule the appointment.

Search Results - ACCESS FOLLOW-UP for Zztest,Zoe

Mon 12/26/2011 - WEISS, PHILIP in KINGSTON-FM - (30 min)

AM [8:00](#) [8:15](#) [8:30](#) [8:45](#) [9:00](#) [9:15](#) [9:30](#) [9:45](#) [10:00](#) [10:15](#)
AM [10:30](#) [10:45](#) [11:00](#) [11:15](#) [11:30](#)

Mon 12/26/2011 - GESSNER, WILLIAM in KINGSTON-FM - (30 min)

AM [8:00](#) [8:15](#) [8:30](#) [8:45](#) [9:00](#) [9:15](#) [9:30](#) [9:45](#) [10:00](#) [10:15](#)
AM [11:15](#) [11:30](#) [11:45](#)
PM [12:00](#) [12:15](#) [12:30](#)

Into the portal.....

They see that he has been seen before by the team and note he also has hypertension, they provide him with food appropriate for his diabetes and hypertension

Age: 58 year old DOB: 1/27/1954 Allergies: No Active Allergies INS: CAP GRANT MyChart: Active
Sex: M MRN: 1251120 PCP: LURIO, JOSEPH Alert:

Patient Snapshot

Patient Care Coordination Note

Lurio, Joseph Thu Feb 2, 2012 3:47 PM

Mr ZZTest is scheduled to see HIV specialist Monday Feb 6 at 9AM and then report to DSS for face to face that afternoon at 1:30 PM

Ambulette arranged by worker to pick patient up at home at 7:30 am.

Demographics

Adam Zztest

58 year old male

16 e 16th
NEW YORK NY 10003
212-206-5223 (H)
347-123-4567 (M)

Comm Pref:

Allergies

No Active Allergies

Last Reviewed by Zztest, Md on 1/19/2011 at 12:00 PM

Medications

- Zolpidem Tartrate 10 MG OR TABS
- PLAN B 0.75 MG OR TABS
- DIOVAN 160 MG OR TABS
- CHLORTHALIDONE 25 MG OR TABS
- IBU 600 MG OR TABS
- CARIMUNE NF 6 GM IV SOLR
- CLOZARIL 25 MG OR TABS
- CLOZARIL 25 MG OR TABS
- LIPITOR 20 MG OR TABS
- TAMIFLU 75 MG OR CAPS
- METFORMIN HCL 500 MG OR TABS
- LIPITOR 10 MG OR TABS
- DEXTROSE 5 % IV SOLN
- LIPITOR 40 MG OR TABS
- ASPIRIN 325 MG OR TBEC

Problem List

Chronic

- HEART MURMUR
- URINARY FREQUENCY
- DIABETES MELLITUS TYPE II UNCONTR UNCOMPL
- ABUSE NOS
- RHEUMATOID ARTHRITIS
- INSOMNIA NOS
- HYPERLIPIDEMIA NEC/NOS
- HYPERTENSION NOS

Next door.....

- The patient is seen by both primary care, case management and mental health all in one shared record

Snapshot Snapshot Care Plan Report: Snapshot

Demographics		Documents Filed to Patient	
Dan H Zz Test Bowser III	1223	Power of Attorney	Not on File
4 year old male	NEW YORK NY 10003	Living Will	Filed - date not specified
	United States	Code Status	Not on File
	000.000.0000 (A)	MyHealth Status	Code Exp

Problem List	
ROUTINE MEDICAL EXAM-ADULT	Chronic
HYPERTENSION NOS	
DIABETES MELLITUS TYPE II UNCONTR UNCOMPL	
ESOPHAGEAL REFLUX	
UNSOCIAL AGGRESS-UNSPEC	
Routine infant or child health check	
Asthma	
R/O Depression, major, single episode, severe	
Screening for depression	
Suicidal ideation	

Health Maintenance	
Hep B (#1)	1/1/2010
Diabetes Screening	1/1/2010
Urinalysis	1/1/2010
Lipid Panel	1/1/2010
Compass Psychosocial Screen	1/1/2010
Ipv (#1)	3/1/2010
Pneumococcal (Pcv) (#1)	3/1/2010
Hepatitis A (#1)	1/1/2011
Gc/chlamydia	11/3/2011
Dtan (#2)	8/5/2013

Allergies	
No Known Allergies	

Medications	
Amoxicillin (NORVASC) 10 MG OR TABS	Long-Term
Tramadol HCl 50 MG OR TABS	
Amoxicillin (NORVASC) 10 MG OR TABS	
Azithromycin 250 MG OR TABS	
Aspirin 325 MG OR TBEC	
Aspirin 325 MG OR TBEC	
Atorvastatin Calcium (LIPITOR) 10 MG OR TABS	
Aspirin 325 MG OR TBEC	
Aspirin 325 MG OR TBEC	
ASPIRIN 81 MG OR TBEC	
Metformin HCL 500 MG OR TABS	

Immunizations/Injections	
DTaP- Diphtheria tetanus toxoids and acellular pertussis vaccine	7/8/2013
Haemophilus Influenzae Type B Vaccine, prp-omp Conjugate	7/3/2012
Measles, mumps, rubella, varicella (mmrv)	7/3/2012

Significant History/Details	
Smoking: Former Smoker (Quit Date:01/01/2008), 1 ppd, 10 pack-years	
Smokeless Tobacco: Unknown	

The Journey Continues....

- The patient reports that he would like to re-enter treatment for alcohol use . The social worker goes into the electronic health record to review available referral sources

Zz Test Bowser, Dan H III, 4 year ... Care Team: My Sticky Note: Allergies: **No Known All...** Health Mainte...: **FYI** Language: None NO HIE
 1/1/2010 PCP: Pandya, Amy Mychart: No proxy exists AD
 Male Case Manager: Cooley, Re... Insurance: SELF PAYN...

Record Select

Search:

Number	Name	Type of Loc	Address
2548	NXU HEMATOLOGY ROBERT UDESKY	Place of Service	145 EAST 32ND STREET, #303 NEW YORK NY 10016
7161	PHYSICAL THERAPY SPORTS PHYSICAL THERAPY OF NEW YORK	Place of Service	1250 WATERS PLACE 12TH FLOOR BRONX NY 10461
5992	TERMINATION SVC PLANNED PARENTHOOD SOUTH BRONX	Place of Service	344 EAST 149TH STREET BRONX NY 10451
1588	ABR (AUDITORY BRAIN RESPONSE)	Place of Service	1000 TENTH AVENUE-1ST FLOOR ROOSEVELT HOSPITAL NEW YORK NY 10019
2002	ACCESS HEALTH SYSTEM	Place of Service	776A WATERVILET-SHAKER ROAD LATHAM NY 12110
6651	ACUPUNCTURE STONE RIDGE ACCUPUNCTURE	Place of Service	3457 U.S. 209 STONE RIDGE NY 12484
5950	ACT BRONX PSYCHIATRIC CENTER	Place of Service	3050 WHITE PLAINS ROAD, 2ND FLOOR BRONX NY 10467
5906	ACT BRONX-LEBANON HOSPITAL	Place of Service	1276 FULTON AVENUE, 4TH FLOOR BRONX NY 10456
5889	ACT CENTER FOR URBAN COMMUNITY SERVICES	Place of Service	665 PARKWAY NORTH BRONX NY 10467
5915	ACT JACOBI MEDICAL CENTER	Place of Service	1400 PELHAM PARKWAY, BUILDING #4 8TH FLOOR BRONX NY 10461
5916	ACT NORTH CENTRAL BRONX HOSPITAL	Place of Service	1400 PELHAM PARKWAY SO BUILDING, #4 8TH FLOOR BRONX NY 10461
6060	ACT PSCH, INC.	Place of Service	987-989 PROSPECT AVENUE, 1ST FLOOR BRONX NY 10459
5947	ACT ST. BARNABAS FORDHAM-TREMONT COMMUNITY MENTAL HEALTH CENTER	Place of Service	260 EAST 188TH STREET, 4TH FLOOR BRONX NY 10458
6054	ACT THE BRIDGE	Place of Service	866 EAST 165TH STREET, LOWER LEVEL BRONX NY 10459
5960	ACT VISITING NURSE SERVICES	Place of Service	355 EAST 149TH STREET, 4TH FLOOR BRONX NY 10455
367	ACUPUNCTURE	Place of Service	64 FULTON STREET NEW YORK NY 10038
1699	ACUPUNCTURE	Place of Service	PACIFIC COLLEGE OF ORIENTAL MEDICINE CENTER 915 BROADWAY 3RD FL
4208	ACUPUNCTURE ANNIE HU, MD	Place of Service	175 JERICHO TURNPIKE SUITE 302 SYOSSET NY 11791
6553	ACUPUNCTURE BRONX COMMUNITY WELLNESS CENTER	Place of Service	2510 WESTCHESTER AVE #110 BRONX NY 10461
5360	ACUPUNCTURE CITY ACUPUNCTURE	Place of Service	139 FULTON STREET NEW YORK NY 10038
6199	ACUPUNCTURE KATHERINE ROSKO, LAC	Place of Service	276 TINKER ST WOODSTOCK NY 12498
3893	ACUPUNCTURE KATIE FINLEY	Place of Service	449 MAIN STREET ROSENDALE NY 12472
5075	ACUPUNCTURE KINGSTON COMMUNITY ACUPUNCTURE	Place of Service	284 WALL STREET, 3RD FLOOR KINGSTON NY 12401
4670	ACUPUNCTURE NATURAL QI ACUPUNCTURE	Place of Service	80 EAST 11TH STREET NEW YORK NY 10003
5113	ACUPUNCTURE NEW VISION ACUPUNCTURE & HERB	Place of Service	273 ROUTE 32 CENTRAL VALLEY NY 10917
5507	ACUPUNCTURE OMNI WELLNESS NYC	Place of Service	928 BROADWAY STE 1200 NEW YORK NY 10010
6209	ACUPUNCTURE PORT EWEN ACUPUNCTURE CENTER	Place of Service	232 BROADWAY PORT EWEN NY 12466

27 records loaded, more records to load.

Accept Cancel

Snapshot

Chart Review

Results Review

Flowsheets

Letters

Demographics

Growth Chart

MyChart Admi...

Media Manager

HealthIX

FYI

More Activities

Pneumococcal (Pcv) (#1)	3/1/2010
Hepatitis A (#1)	1/1/2011
Gc/chlamydia	11/3/2011
Dtap (#2)	8/5/2013

Significant History/Details

Smoking: Former Smoker (Quit Date:01/01/2008), 1 ppd, 10 pack-years

Smokeless Tobacco: Unknown

Alcohol: 6.0 oz alcohol/week

The Patient Arrives.....

- At the treatment program. Staff sign into the portal and see the patients entire record, problem list , medications, labs and social assessment. The patient is expedited to the treatment unit.

Chart Review

InstituteLink Home In Basket Pt Lists Clinicals Patient Utils Secure Log Out **Epic** [Close patient record](#)

Zztest, Zoe Age: 59 year old DOB: 2/14/1952 Allergies: Penicillins INS: SLIDING FEE MyChart: Inactive
Sex: F MRN: 1078018 PCP: ZZTEST, MD Alert: HM Overdue or Due Soon

Clinical Review Chart Review - Loaded:30, Filtered count:30 [Last refresh: 11:17:15 AM]

Encounters Laboratory Imaging Procedures ECG Other Orders Medications Letters Notes Misc Reports Episodes Media Encounters

Start Review Refresh Filters Text Search Default filter Encounter Flowsheets

Applied Filters: Default filter (Load 30 more) (Load all)

<input type="checkbox"/>	Date ▼	Type	Department	Specialty	Provider	Description
<input type="checkbox"/>	11/16/2011	Community Orders	ELD		Epiccare Link, Physician, MD	Routine General Medical Examination At A Health Care Facility
<input type="checkbox"/>	10/19/2010	Nurse Only	NGIM	IM	Red, Pat	Vaccine for Influenza (Primary Dx)
<input type="checkbox"/>	10/06/2010	Community Orders	ELD			Diabetes Mellitus Type II-Uncompl
<input type="checkbox"/>	07/22/2009	Social Work	P-SW	PSYCHOSOCIAL	Meyer, Emma	Erroneous Encounter--Disregard (Primary Dx)
<input type="checkbox"/>	06/29/2009	Orders Only	KFM	FP	Roth, Robert	Angina Pectoris NEC/NOS (Primary Dx)
<input type="checkbox"/>	05/26/2009	Office Visit	AAFM	FP	Zztest, Md	
<input type="checkbox"/>	05/26/2009	Office Visit	E13-FM	FP	Zztest, Md	Hypertension NOS (Primary Dx)
<input type="checkbox"/>	05/26/2009	Office Visit	E13-FM	FP	Zztest, Md	
<input type="checkbox"/>	05/26/2009	Office Visit	SH-FM	FP	Zztest, Md	
<input type="checkbox"/>	05/22/2009	Office Visit	AAFM	FP	Zztest, Md	Erroneous Encounter--Disregard (Primary Dx)
<input type="checkbox"/>	05/22/2009	Orders Only	KFM	FP	Patel, Vijay R	Benign Hypertension
<input type="checkbox"/>	05/22/2009	Telephone	KFM	FP	Patel, Vijay R	Benign Hypertension (Primary Dx)
<input type="checkbox"/>	04/29/2009	Orders Only	SH-FM	FP	Zztest, Md	Hyperlipidemia NEC/NOS (Primary Dx); Chronic Depressive Person
<input type="checkbox"/>	04/29/2009	Office Visit	AAFM	FP	Zztest, Md	

Logged in as: LINK, DANREF

MEDICATIONS (Current/Past)

[Close patient record](#)

Zztest, Zoe Age: 59 year old DOB: 2/14/1952 Allergies: **Penicillins** INS: SLIDING FEE MyChart: Inactive
 Sex: F MRN: 1078018 PCP: ZZTEST, MD Alert: **HM Overdue or Due Soon**

- Clinical Review
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- Problem List
- Medications**
- Histories
- Growth Charts
- Upload Document
- Patient Profile
- Demographics
- Referrals
- Referral by Member
- Referral by Provider
- Scheduling
- Quick Appt
- Upcoming
- Appointments
- Logged in as:
- LINK, DANREF

Medications										
<input type="button" value="Current"/> <input type="button" value="History"/>										
<input type="button" value="Refresh"/> <input type="button" value="Legend"/>										
Prescription History : All medications loaded.										
Medication	Sig	Disp	Refills	Start Date	End Date	DAW	Comment	D/C Reason	Route	
NITROGLYCERIN 0.4 MG SL SUBL	One tab under tongue, may repeat every 5 min to max of 3 tabs	25 x4	2	6/29/2009					Sublingual	
TUBERCULIN PPD 5 UNIT/0.1ML ID SOLN	0.1 ML ID X 1 DOSE	0.1ml	0	9/19/2008	9/20/2008				Intradermal	
HYDROCHLOROTHIAZIDE 25 MG OR TABS	ONE -half TAB PO QD	30	5	6/24/2005					Oral	
ASPIRIN 81 MG OR TBEC	1 TABLET DAILY	30	0	6/24/2005					Oral	
FLUOXETINE HCL 20 MG OR CAPS	1 CAPSULE EVERY MORNING	30	0	2/24/2005	10/23/2008				Oral	
LIPITOR 10 MG OR TABS	1 TABLET DAILY	30	0	6/25/2004					Oral	
GLUCOPHAGE 500 MG OR TABS	1 TAB PO BID WITH MEALS	60	6	5/9/2004	10/6/2004				Oral	

Following Treatment....

- The patient completes treatment and is ready for discharge. The staff go into the portal and make a primary care and mental health appointment.
- Patient is discharged into an SRO which has access to the portal
- The discharge plan is uploaded into the portal for the primary care team and housing program

Document Upload

Zztest, Zoe

Age: 59 year old DOB: 2/14/1952
Sex: F MRN: 1078018

Allergies: **Penicillins**
PCP: ZZTEST, MD

INS: SLIDING FEE MyChart: Inactive
Alert: **HM Overdue or Due Soon**

Clinical Review

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Upload Document

Patient Profile

Demographics

Referrals

- Referral by Member
- Referral by Provider

Scheduling

- Quick Appt
- Upcoming
- Appointments

Logged in as:

LINK, DANREF

Upload a Document

Select a document to upload, enter a description, and click **Upload**. The document will through a verification process before it is attached to the patient record. If you want to upload the document to another patient, click the **Change Patient** button.

Upload a Document

Patient: Zztest, Zoe

Description:

Message for reviewer:

Document:

Maximum file size: 10.0 MB
Allowed file types: JPEG, BMP, PDF, DOC, TIFF, JPG, TXT, TIF

Priority

- High
- Routine
- Low

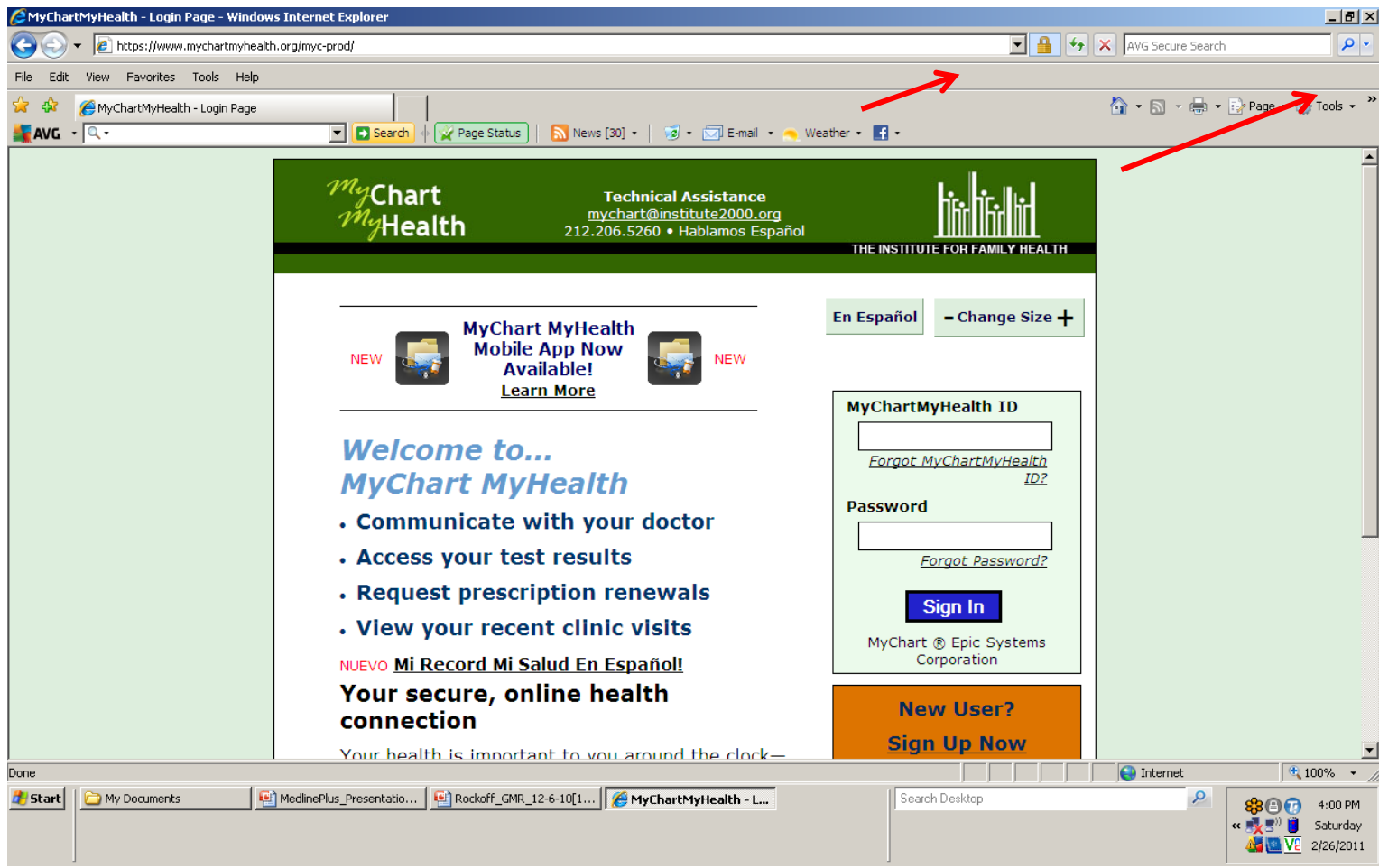
Required Item

The Journey

- Patient keeps primary care and mental health appointments. Patient is shown how to access his record on line through the patient portal in case he needs access to his record. Patient also attends the portal class happening that day in the center
- Patient is given a list of places nearby for free computer access

Patient Portal Classes





My Visit at the Institute for Family Health

Brook Zzacme
6/21/2010 Office Visit

Description: 60 year old male
Provider: SARAH NOSAL,MD
Department: Urban-Fam Med

My Regular Medical Provider

Your primary care clinician is listed as ANDREW GABLER,MD. If you have any questions after today's visit, please call 718-293-3900.

My Reason(s) for Today's Visit

Diabetes

Refill Follow-up

My Vital Signs

Blood Pressure	Pulse	Temperature	Height	Weight	BMI
150/79	76	98.6 °F	5' 2"	254 lb	46.45 (kg/m sq)

My Problems At This Visit and Problems Related to My Medications

DIABETES MELLITUS TYPE II UNCONTR UNCOMPL [250.02]

HYPERLIPIDEMIA NEC/NOS [272.4]

HYPER

EXTRIN

HYPOT

My Medications

Start Taking

SYNTH

METFO

METOP

LISINO

Stop Taking

METOP

This Is a Follow-up

SYNTH

METFO

METOP

LISINO

We Performed the Following

NCQA PROVIDER ASSESSMENT COMPLETED [99999.515 CPT(R)]

TSH, HIGH SENSITIVITY (SERUM) [84443 CPT(R)]

ALT (SGPT) [84460 CPT(R)]

CREATININE (BLOOD) [82565 CPT(R)]

LIPID PANEL [80061 CPT(R)]

HGA1C (HGB GLYCOSYLATED) [83036 CPT(R)]

RANDOM GLUCOSE IN HOUSE [82947 CPT(R)]

My Goals And Plans

You have a diagnosis of DIABETES. Here are your personal treatment goals:

HgbA1C (average sugar level): Your goal is less than 7 %

- Your last results are:

Lab Results Component	Value	Date
HGBA1C	8.3*	6/21/2010

LDL (bad cholesterol): Your goal is less than 70

**You have a diagnosis of DIABETES.
Here are your personal treatment goals:**

High A1C (average sugar level). Your goal is less than 7%.

- Change Size +


Home

Log Out

Welcome,
Michelle
Zztest!



Schedule an Appointment


[Step 1 of 5] Choose A Reason for Appointment 

Please choose a reason for visit and click **Continue**.

New Health Problem

Continue >

Cancel

If you do not see an appropriate reason for your appointment, or if you need help scheduling an appointment, you may [click here](#) to send a request, or call your health center directly. Requests will be responded to within 2 business days. 

New Health Problem	For new onset of symptoms.	15 minutes
Follow-Up Visit	For ongoing medical condition for which you have previously been seen by your provider.	15 minutes
GYN/PAP	To request gynecological or annual woman's health assessments. Not intended for obstetrics.	15 minutes
Preventive Care	For ongoing health maintenance such as immunizations. Not intended for annual physical.	15 minutes

▶ My Medical Record

▶ Message Center

▼ Appointments

Schedule an appointment

Cancel an appointment

Future appointments

Past appointments

▶ My Referrals

▶ Billing & Insurance

▶ Address & Settings

▶ Customer Service

Medline Plus

Find information on:

The Journey Goes National...

- The patient moves to California to live with family and goes to for care at a local hospital ambulatory care center.....He brings information from his health record in New York. The staff recognize they have the same electronic health record.....

Test, Betty
Age: 24 year old
DOB: 4/4/1988
Allergies: **Not on File**
Sex: F
MRN: 1324011
PCP: COMMUNITY, PCP

6/7/2012 visit with Zztest, Md for FOLLOW UP (PCP)

- Flowsheets
- Results Review
- Allergies
- History
- Problem List
- Demographics
- Letters
- Identity Manager
- MyChart Results R...
- Growth Chart
- Medications
- Order Entry
- MyChart Administra...
- Media Manager
- Forms
- Immunizations
- Enter/Edit Results
- Visit Navigator**

- Charting
- Care Everywhere
 - Chief Complaint
 - Vitals
 - BestPractice**
 - SmartSets
 - Nursing Notes
 - Mental Health
 - Problem List
 - Goals
 - Progress Notes
 - History
 - Diagnoses
 - Orders
 - Pt. Instructions
 - LOS & Follow-up
 - Close Encounter

Care Everywhere Outside Records (View Only)

This patient has no Care Everywhere information.
[Request Outside Record](#)

Chief Complaint

None

Vitals

[+ New Set of Vitals](#)

None Taken

Other Vitals	
OB/Gyn Status	Never r
Reviewed:	
Tobacco	
Smoking Status:	Never A
Packs/day:	0
Years:	0
Smokeless Status:	Unknow
Reviewed:	Never r

BestPractice Advisories

- Please offer Gardasil Vaccine ----[Click Here for Prescribing Info](#)**

Open SmartSet: HPV VACCINE (GARDASIL) [preview](#)
- Please perform patient's annual PHQ2 assessment.**
- Adult Underweight - If patient is 18-64 with BMI under 18.5 or patient is 65 or older with BMI under 22, Complete Adult**

Open SmartSet: ADULT UNDERWEIGHT (Diagnosis and Plan must be documented to turn off BPA) [preview](#)

[Refresh](#) Last refreshed on 6/7/2012 at 9:46 AM

Patient Query

Mount Sinai - Test

Test, Betty

99 ST
1
NEW YORK, NY 10020

Sex: Female
Home: 212-777-8888
SSN: [REDACTED]

DOB: 4/4/1988
Work:

Age: 24 years
Cell:

Local Patient Demographics

Test, Betty

99 ST
New York, NY 10020

Sex: Female
Home: 212-777-8888
SSN: 121-12-1121

DOB: 4/4/1988
Work:

Age: 24 years
Cell:

Is this the correct patient?

Yes

No

Questions ???

Vlittle@institute.org

