

Utilizing Patient Clipboard (eForm) (Patient Generated Health Information)

Hello, and welcome to today's educational recording on (utilizing patient clipboard). Today, we'll be learning how patient clipboards are sent to a patients' portal account for them to review, update, and electronically return into the Cerner database.

The clipboard allows Patient Portal users with upcoming appointments to enter and review information prior to their appointment, such as medications, allergies, health issues, procedures or surgeries, family history and general health questions. Any added or updated information is available in the Ambulatory Workflow components and in a document for the patient's healthcare team to review and use to update the patient's chart as needed. Clipboard forms can also be used for non-appointment interactions, including follow-up questions related to an appointment or quality surveys.

Appointment-Based Clipboards

Clipboard forms are enabled to automatically send to patients with an active portal account for the following appointment types, 7 days before their scheduled appointment.

- FP New Patient
- FP Established Patient

The electronic form includes the following sections to obtain reviewed information from the patient:

1. Medications
2. Allergies
3. Active Health Issues
4. Procedures and Surgeries
5. Immunizations

Users have the ability to manually send a clipboard to a patient, should it be necessary or an appointment scheduled after the 7 day window lapses.

1. To manually send a clipboard (eForm), log into PowerChart, navigate to 'Communicate' then 'Message'



2. Complete fields specific to the message or response (**Patient, responsible provider, to consumer, subject, & contents of the message**)

New Message

Task Edit

High Notify Message Journal (6) Portal Options

Patient: AMBMUNSON, LAUREN K Caller: AMBMUNSON, LAUREN K Caller #: H (231) 935-2073, M (215) 443

To:

CC:

Subject: General Message

☒ Save to Chart As: Patient Letter

Message

General Message:

General Message to the patient

3. Select 'Portal Options', and attach the appropriate clipboard(s). And select 'OK', then 'SEND'.

High Notify Message Journal (8) Portal Options

Patient: AMBMUNSON, LAUREN K Caller: AMBMUNSON

To:

CC:

Subject: General Message

Message

Portal Options

Available Clipboard

Select	Clipboard
<input checked="" type="checkbox"/>	Testing 11/3

4. Message will be sent to the patients portal with an electronic eForm to complete and electronically return to the clinic

Patient will click on the link provided in the email message, which will take them to the login of patient portal site. Upon entering credentials, patient will see a message in their portal inbox to select. Patient will begin by selecting the embedded link to start the process.

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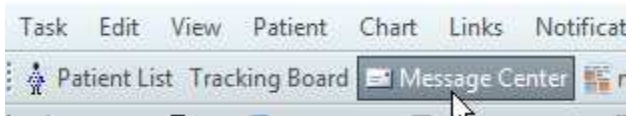
2 Clipboards to complete

You have an assigned Clipboard to complete in preparation for an upcoming appointment or as part of transferring information to your health providers.

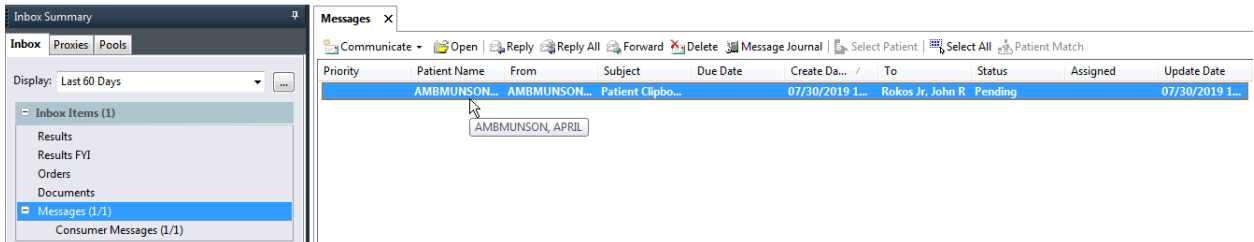
Clipboard Arrives Back from Patient (((EDUCATE RIGHT AFTER THE ABOVE, SAME SESSION)))

Now we will see the steps needed when a patients' clipboard has been returned back to the clinic for review and importing. Depending on your sites workflow, the message and review of the patient submitted data could be done by multiple staff. Confirming with the patient and reconciling the information is always important.

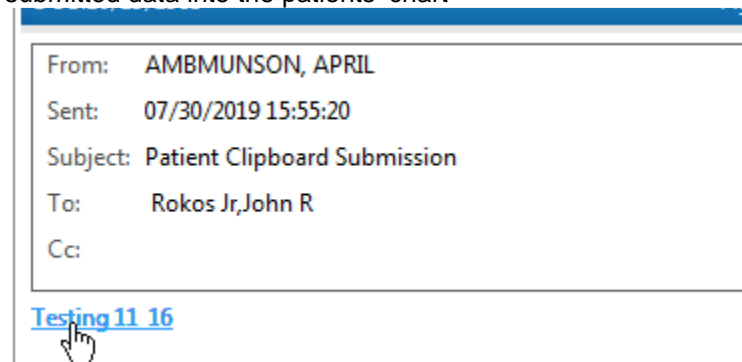
1. Access PowerChart and navigate to Message Center



- The message and eForm will arrive into Powerchart's Message Center. The message will be located in the 'Consumer Messages' folder. If your practice is using pool groups, make sure you are checking and have appropriate access to the 'Pools' tab. Message routing is configured on the back end of the system based on the needs of your practice.



- Open the message and select the link for 'Health History' and will review/approve the patient submitted data into the patients' chart



- When select the form, you will visually see what has been updated. It will be important to select the 'SAVE TO CHART' button at the bottom of the page. This allows the data to import into the chart awaiting confirmation and reconciliation.
- Seen here will be how data will display in a chart until reconciliation has been completed.




In addition, there are other items that can be scanned into a patients' chat that also count for Patient Generated Health Information. These include:


- AMD & DPOAH note type
- Notes Authored by the Patient note type
- Patient Amendment note type
- Patient Provided Medication List note type (if patient bring in list, copy it and scan it)

***** Author should now be the person scanning


*Type: AMD/DPOAH ▼

*Author: Scanned, Documents 


*Type: Notes Authored By Patient ▼

*Author: Scanned, Documents 

*Type: Patient Amendment ▼

*Author: Scanned, Documents 

*Type: Patient Provided Medication List ▼

*Author: Scanned, Documents 

This concludes today's session on utilizing the patient clipboard functionality.