

HEALTH INFORMATION TECHNOLOGY,

**HIT**EQ

EVALUATION, AND QUALITY CENTER

**Electronic Patient Engagement Tools:  
Building an Inventory for Health Centers**

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October 21, 2020

# Intro to HITEQ

The HITEQ Center is a HRSA-funded National Training and Technical Assistance Partner (NTTAPs) that collaborates with HRSA partners including Health Center Controlled Networks, Primary Care Associations and other NTTAPs to engage health centers in the optimization of health IT to address key health center needs through:

- A **national website** with health center-focused resources, toolkits, training, and a calendar or related events.
- **Learning collaboratives, remote trainings, and on-demand technical assistance** on key content areas.



email us at [hiteqinfo@jsi.com](mailto:hiteqinfo@jsi.com)!

## HITEQ Topic Areas

Access to comprehensive care using health IT and telehealth

Privacy and security

Advancing interoperability

Electronic patient engagement

Readiness for value based care

Using health IT and telehealth to improve Clinical quality and Health equity

Using health IT or telehealth to address emerging issues: behavioral health, HIV prevention, and emergency preparedness

# Today's speakers

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**Jillian Maccini, Project Director  
The HITEQ Center**

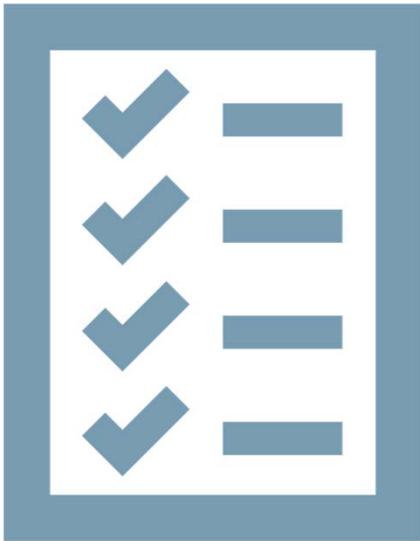


**Lisa Perry, Principal  
Morningside Health Strategies**



# Agenda

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- I. Project Background
- II. Early steps
- III. Gathering information
- IV. Creating the Inventory
- V. Sample products
- VI. Key considerations for product selection
- VII. Next Steps

# I. Project Background

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**01**

**Project Origins**

**02**

**Project objectives**

**03**

**Project Team**

# Project Origins

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- HRSA HEALTH CENTER CONTROLLED NETWORKS | 2019-2022
  - Goal A: improve patient and provider experience
    - Objective A1: improve patient access to personal health information
    - Objective A2: improve patient engagement in care
- Health centers increasingly interested in tools for electronic patient engagement to improve care, achieve efficiencies and increase patient and provider satisfaction
- Relevance and value of these tools heightened as health centers dealt with the impacts of the Coronavirus pandemic
- HITEQ desire to support HCCNs and health centers in this

# Project Objectives

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- An inventory of Electronic Patient Engagement tools that reflects community health center needs and experiences
- **By** and **for** community health centers



# Project Team

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- HITEQ Center staff and a group of HCCNs came together to create a ***Change Agent Team***
- Morningside Health Strategies



## II. Early Steps

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- Testing the concept with the Change Agent Team:
  - Would such an inventory have value for you?
  - What would need to be included?
- Defining Electronic Patient Engagement (EPE)
- Developing the survey tool
- Soliciting surveys via SurveyMonkey from members of Change Agent Team

# Define EPE

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- Tools that require patient action
- Examples:
  - Communication with providers
  - Response to health center outreach
  - Self-registration or appointment scheduling
  - Requests for personal health information, medication refills, etc.
  - Patient-generated data (e.g. food intake, compliance with care plan)
  - Education
  - Surveys, reviews, feedback
- We decided not to include telemedicine, as this is a topic large enough for its own inventory and was changing in real time.

# Developing the Survey: Key Considerations for Product Selection



Status of  
health  
center  
adoption



Key features  
that  
influenced  
decision to  
adopt



Cost (both  
upfront and  
ongoing)



Integration  
with other  
electronic  
platforms,  
such as EHR



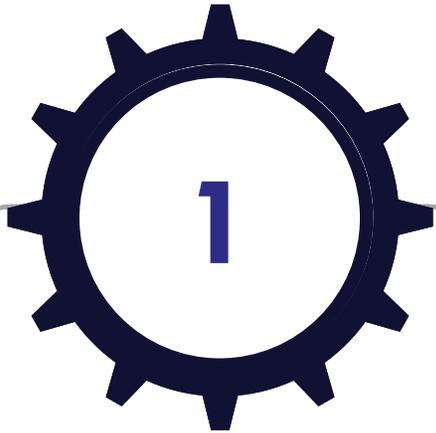
Overall  
satisfaction



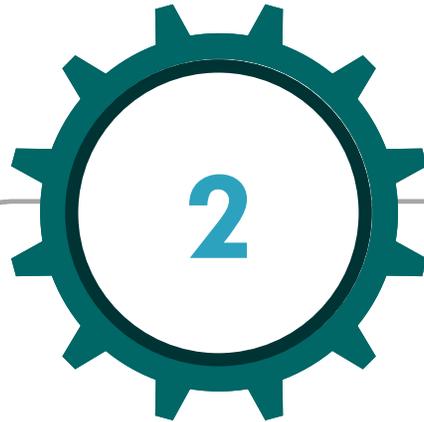
Features  
that are  
lacking or  
pose  
barriers to  
adoption

## III. Gathering the Information

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**Challenges**



**Expanding our  
Outreach**



**Addressing Data  
Validity**

# Challenges

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- COVID-19
- Coronavirus
- The Pandemic
- ...and the usual difficulties in collecting survey responses
- Validating the responses

## Expanding the outreach

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- Additional health center contacts
  - Change Agent Team
  - HITEQ Center
  - Consultants
- Phone interviews

# Addressing Data Validity

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- Handling conflicting information on the same product
- Follow-up questions
- Vendor demos and interviews: 8 requested; 6 granted
- Customer reviews on other websites
- Coding inventory to indicate data sources

## IV. Creating the Inventory

**01**  
Format

**02**  
Content

**03**  
Sample Tools

# Format of Inventory

## Report

- **Pros:** Could provide helpful context about the process; could summarize lessons learned; could include assessment
- **Cons:** Wouldn't be as good of a reference or at-a-glance for health centers; less user friendly

## Excel Table

- **Pros:** Could sort or organize as user sees fit, standardized format allows more apples-to-apples comparison
- **Cons:** Not visually appealing, information about the tools is not completely standard, so there would be gaps

## Infographic

- **Pros:** Visually appealing, easily digestible,
- **Cons:** Not able to be sorted or categorized as meaningfully, would not include assessment or overarching lessons learned.

## Other

- Create some combination of these to be most useful to health centers.

# Format and Content



## CareMessage

Patient texting/messaging tool | [www.caremessage.org](http://www.caremessage.org)

CareMessage is a texting/messaging platform. It was developed by a non-profit company whose mission is to leverage technology to help safety-net organizations fulfill the essential needs of underserved populations. Our FQHC reviewers found it useful for patient outreach including mass messaging to promote preventive screenings, broadcast the availability of new services, and send weekly educational messages to patients with specific chronic conditions (e.g. diabetes).

### Information from Vendor:

- EHR integration is strongest for appointment reminders
- Educational campaigns can target specific groups - most customers use Azara DRVS, i2i or Relevant Pop Health systems to create groups
- Education/health coaching programs (19) allow some personalization based on "branching" logic in program
- Content based on clinically validated approaches, motivational interviewing, 6th-grade reading level
- Additional languages if health centers do translations; machine translation too risky
- CM LITE: free for up to 60 days under pandemic - outreach & texting; no integration
- Tool to facilitate patient referrals
- Not a telehealth platform, but offers tutorial videos.

### FUNCTIONALITY

- |                          |                            |
|--------------------------|----------------------------|
| patient Reminders: ✓     | FAQs: --                   |
| patient Health Info: --  | Billing + payment: -- ✓    |
| medication refills: ✓    | Pt Surveys: --             |
| ppt. scheduling: --      | Pt self registration: -- ✓ |
| secure messaging: --     | Care gap outreach: --      |
| health education: ✓      | Pt monitoring: --          |
| care plan compliance: -- | Patient-generated data: ✓  |
|                          | Telehealth: --             |

### INTEGRATION

- Azara DRVS Population Health ✓
- i2i & Relevant Population Health ✓
- EHRs: Greenway, Athena, Epic, NetxtGen, eCW, GE Centricity for appointment reminders ✓

Information provided by FQHCs: ✓ = information provided by vendor

### DETAILS AS OF JULY 2020

#### COST:

Annual subscription based on total patient population  
Implementation: 10% of subscription

#### RATINGS:

CAPTERRA



[www.capterra.com/vp/194357/CareMessage/#review](http://www.capterra.com/vp/194357/CareMessage/#review)

#### STRENGTHS:

- Educational 'campaigns' text patients 1-2x per week with diagnosis-related tips
- Mass messaging
- Analytics on product use & patient responses

#### WEAKNESSES:

- SMS messaging not HIPAA-compliant
- Follow-up to patient responses largely manual (e.g. creating call lists)
- Limited 2-way communication
- English & Spanish only



- One-page per product
- Summarizes features, strengths and weaknesses
- Includes survey and vendor data, with vendor data clearly identified
- Cost and rating data included when available

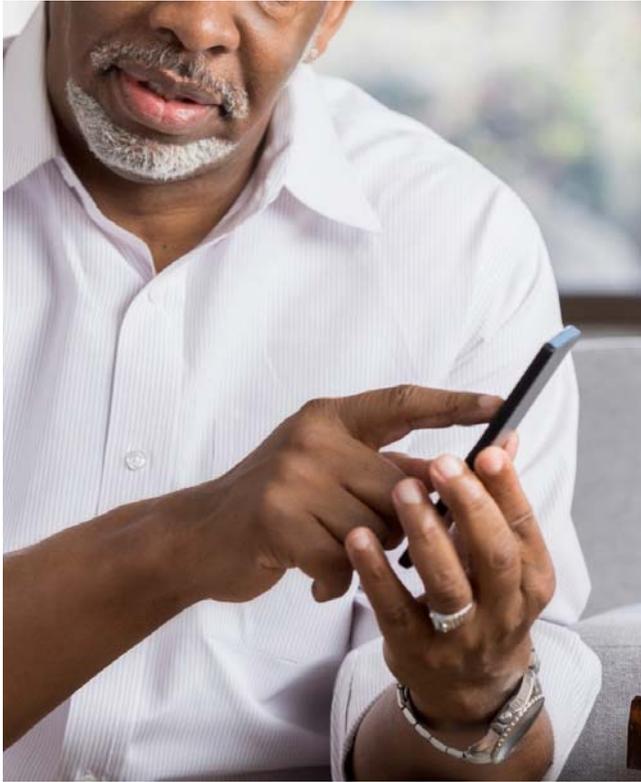
# Inventory to-date

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- 10 EPE products
  - 6 for patient communication
  - 2 for patient intake
  - 2 patient portals
- 16 interviews/surveys
- Published on [HITEQcenter.org](http://HITEQcenter.org)

# Sample of Tools

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- Relatient
- CareMessage
- UpDox
- SolutionReach
- Luma Health
- Phreesia
- Otech

# Patient Communication: *Relatient*

- Mass-messaging
- Library of pre-built health campaigns
- HIPAA-compliant 2-way chat
- Appointment alerts – confirmation is integrated to reviewer's EHR; cancellation not fully integrated
- Appointment scheduling with automated wait-list – no password required
- Patient self-registration
- Billing and payment

**Strengths:** easy to use and customize;  
vendor very responsive

**Weaknesses:** available in English and  
Spanish only (translator tool available)

# Patient Communication: *CareMessage*

- Mass messaging
- 19 health education programs with diagnosis-related tips
- Text-based coaching programs allow some customization through branch logic
- Appointment reminders – confirmation integrated to several EHRs; cancellation integrated if write-back is allowed
- Integration to Population Health Management systems
- A non-profit company, with a mission to leverage technology to serve the patients of safety-net organizations

**Strengths:** mass messaging; educational campaigns; vendor support; analytics on product use

**Weaknesses:** limited 2-way communication; follow-up to patient responses largely manual; supports English and Spanish only (health center can do translations in other languages)

# Patient Communication: *Updox*

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- Mass messaging, appointment reminders
- Appointment reminders and scheduling
- Secure messaging via text with web link
- 3 levels of integration available, depending on EHR
- Can send, receive and manage e-faxes
- Billing and payment

**Strengths:** mass messaging

**Weaknesses:** EHRs with lower level of integration require more manual work/workflow changes; English and Spanish only; vendor support

# Patient Communication: *SolutionReach*

- Mass messaging with pre-built groups
- Appointment self-scheduling and reminders
- Automated recall when EHR flag indicates patient due for visit but not scheduled
- e-self-registration, with some write-back to EHR
- 2-way texting with HIPAA consent tool
- Pre-built educational campaigns by diagnosis; can be scheduled at intervals post-appointment
- Refer-a-friend facilitates patient referrals

**Weaknesses:** Vendor Responsiveness

**Integration** to VOIP and PM systems identifies patient callers and provides relevant information

# Patient Communication: *Luma Health*

- Reminders & self-scheduling
- Mass messaging
- Secure links embedded in SMS texting for PHI
- Enables patient reviews and referrals
- Patient education based on ICD and CPT codes
- e-self registration

**Strengths:** Self-scheduling, real-time and with automated waiting list; supports 20+ languages

**Interfaces:** 7 EHR bi-directional (most common EHRs among CHCs); Azara DRVS

# Patient Intake: *Phreesia*

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- e-self-registration
- Patient Surveys
- Screenings (PHQ-9, SBIRT, etc.)
- Appointment scheduling
- Billing and payment

**Strengths:** Demographic information fully integrated to 7 EHRs; analytics on product use

**Weaknesses:** Information other than demographics becomes a PDF for manual entry to EHR

# Patient Intake: *Otech*

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- Patient e-self-registration before or upon arrival
- Patient e-form and consent completion
- Can do anything usually done at the Front Desk (scheduling, registration, insurance verification, etc.)
- Under a direct integration (available free with 4 EHRS) bidirectional read-write capability allows system to request only data that is missing
- Billing and payment
- Reminders

**Strengths and weaknesses:** due to recent implementation, health center was not comfortable providing this information

## VI. Key Considerations for product selection:

### Functionality

- What functionalities are most important to your teams?
  - Develop use cases for vendor to demonstrate during selection process.

### Workflow

- What *workflow changes* or *task reassignment* will be required?

### Automation

- Does the tool reduce manual work sufficiently for your needs?
  - How automated is messaging for normal labs, no-show rescheduling, responding to appointment and refill requests?

### Ease

- How *easy is it for patients to use*?
  - Is it an app requiring a smartphone? Is a password required? What languages are available? How intuitive is the user interface?

# Other Key Considerations



**Integration can mean many things. Dive deep in conversations with vendor.**

- Is it a PDF uploaded to your EHR?
- Is it a data file sent via SFTP? How automated is this process?
- Can data be integrated to EHR data fields/is write-back to EHR allowed?
- Can the tool create and use patient groups for targeted messaging, provider and staff groups for task assignment? Or must the groups be created with another tool and sent to vendor via SFTP?



**How do existing customers feel about vendor support while implementing and ongoing?**



**How does cost compare to cost of any comparable functionality available through your EHR?**

## VII. Next Steps

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- Additional products
  - Survey still available from HITEQ
- “Contact Us” button on Inventory webpage for more information

# Contact Us

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# Questions? Feedback?

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