Outreach Implementation: Playbook of Resources

Updated August 23, 2019

Initiating, Implementing, and Sustaining Centralized Telephone Outreach (with Cipher)

- All documents courtesy UCSF (Meg Wheeler & Kristin Gagliardi)
- Link: August 15, 2019 Workshop session slides

I.   SCRIPTS

- ***Advance Care Planning Outreach, English*** Script for outreach to explain what advance care planning is, offering advance care planning staff support, and offering additional information
- ***Cancer Screening, English*** Cancer Screening Voice Script in English includes the Cipher automated script, inbound message script, and SMS message script
- ***Depression Outreach, English*** Script for depression outreach for Primary Care empaneled patients including patient outreach criteria, depression screening "check-in" script, administering follow-up PHQ assessment, and scheduling appointments
- ***Flu Vaccine Outreach Retroactive, English*** Script for influenza vaccine outreach for primary care patients, including patient criteria, call schedule, collecting patient and family flu shot history, and SMS message script
- ***Generic Cipher Script, Due for Screenings, English*** Script for generic phone outreach for routine screenings, including responses for inbound messages and SMS messages
- ***Hypertension Care Gap Outreach Voice Script, English*** Script for Hypertension Outreach Voice includes the Cipher automated script, inbound message scripts, and SMS message scripts, as well as the patient outreach criteria.
- ***Panel Cleanup, English*** (UCSF) Script for initiating panel clean-up, including providing clinic locations and determining if patient still wants to receive care at site
- ***Primary Care Panel Management General Scripting Recommendations, English*** Recommendations for scripting live patient calls cover questions that are out of scope for MAs/PMs, addressing patient complaints, scheduling new appointments, and calling with appointment reminders

II.   WORKFLOWS

UCSF Workflows includes patient criteria, volume of calls, documentation steps, and differentiated automated vs. manual steps

- ***Cancer Screening Panel Management Workflow***
- ***Advance Care Planning, Health Care Navigator Outreach Workflow***
- ***Hypertension Panel Management, Health Care Navigator Workflow***
- ***Depression Follow-up Screening Protocol Workflow***

III.   OTHER RESOURCES

- ***Advance Care Planning, Health Care Navigator Manual*** (UCSF) Manual to conduct Cipher calls to support advance care planning including running reports for eligible patients in CipherHealth and Apex, scripts for patient questions, and documentation workflows and step-by-step instructions

- All documents courtesy Jim Meyers, DrPH jimmeyrsdrph@gmail.com
- Link: August 15, 2019 Workshop session slides

I. EXECUTIVE & PROJECT SUPPORT

- ***Patient Portal Deployment for Clinic Executive Leadership*** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of the executive sponsor on a patient portal development team, including oversight, setting priorities, and evaluating progressing

- ***Patient Portal Deployment for HIT Staff*** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of Health Information Technology staff on a patient portal development team, including establishing role clarity, project management, and implementation preparation

- ***Patient Portal Deployment for Portal Team Members*** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of the portal team in the development and deployment of a patient portal, including selecting a multidisciplinary team, developing a work plan, and tracking progress

- ***Patient Portal Deployment for Provider Champions*** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of provider champions in the engaging providers in portal deployment

- ***Patient Portal Deployment Portal Team One-Year Work Plan*** (Jim Meyers, DrPH) Sample work plan to launch a patient portal in a one-year timeframe, including 16 elements and associated tasks from setting vision, training staff, preparing for mobile features, to providing non-English functionality, and more

- ***Patient Portal Deployment Project Management Plan*** (Metro Community Provider Network) Sample project management plan including task name, duration, start and finish date, and status tracking

- ***Patient Portals in the Safety Net: Patient Portal Planning*** *(1 of 3)* (California Health Care Foundation) The first in a series of papers that documents the experiences, lessons learned, and tools used by three California community health centers from establishing the vision, assessing barriers, incorporating patient voice, launching portal planning team, and more

- ***Patient Portals in the Safety Net: Implementation*** *(2 of 3)* (California Health Care Foundation). The second in a series of papers sharing how California health systems tailored portals to their own operations and their unique patient populations

- ***Patient Portals in the Safety Net: Optimization*** *(3 of 3)* (California Health Care Foundation) The third in a series of papers that document the experiences, lessons learned, and tools used by three California community health centers while increasing usage, expanding services, promoting long-term sustainability, driving quality improvement, and more

- ***Portal Project Management Tracking Form*** (Jim Meyers, DrPH) Sample project management task tracking Excel document, including tasks from convening portal team, reporting to senior leadership, writing job descriptions, developing marketing materials, developing staff workflows, and more

- ***Sharing Ideas Webinar: Patient Portal Sustainment*** (The Colorado Health Foundation) Webinar featuring a presentation by a safety net's CIO on sustaining constant improvement of a patient portal; additional presentation by a grantee cohort sharing on preparing for portal operations after grant funding

II.   PATIENT ENGAGEMENT

▪ *Example Portal Virtual Feedback Group Invitation Letters* (Los Angeles Department of Health Care Services, LA DHS) Sample letters used to invite stakeholders to join a feedback group, share the purpose of the group, explain how to join, and provide other relevant details; each letter is tailored to patients, providers, or other hospital system staff

▪ *Guidelines for a Virtual Patient Portal Feedback Group* (Jim Meyers, DrPH) Guidelines tailored to patient portal feedback groups include tips and best practices for preparing discussion topics, collection processes, targeted recruitment, and many other considerations for successfully collecting regular feedback from targeted audiences

▪ *Patient Portal Online Satisfaction Survey – Patient Examples* (Jim Meyers, DrPH) Three example questionnaires including multiple choice, checkbox, scale, and open-ended questions for collecting patient feedback; two questionnaires are in English and one questionnaire is in Spanish

▪ *Patient Portal Users Tech Survey* (Jim Meyers, DrPH) Sample questionnaire to assess patient access o phone and internet service to inform technology and portal strategy

▪ *Patient Portals: Patient Perspectives* (California Healthcare Foundation) A three-minute video sharing patients' perspectives about why they use portals: convenience, partnership, communication, access, and more

III.   STAFF & TRAINING

▪ *Example Patient Portal Infographic* (LA DHS) An infographic for staff to share goals, relevant user & usage statistics, goals, strategies, and a provider spotlight

▪ *MyWellness Competition Kickoff Video* (LA DHS) One minute video for providers and staff to increase patient portal enrollment through supportive education, friendly competition, and incentives

▪ *Patient Portal Online Satisfaction Survey - Staff Examples* (High Plains Community Health Center) Example questionnaire to collect staff feedback about patient portals; English-only example

▪ *Patient Portal Training Toolkit* (LA DHS) Training materials for providers learning how to leverage MyWellness Portal including team preparation prior to patient enrollment, sample scripts, data tracking instructions, and more

▪ *Example eCW Portal Pre-Visit Questionnaire* (West County Health Center) Training material, including step-by-step picture instructions, on how patients and medical assistants complete and update pre-visit questionnaires to prepare for upcoming visits

IV.   COMPREHENSIVE METRICS

▪ *Case Study: Patient Portal Operational Tracking Charts* (The Colorado Health Foundation) Examples of graphs displaying common patient portal operational measures, allowing the progress of a project to be tracked over time

▪ *Patient Portal Measures* (Jim Meyers, DrPH) Commonly used measures in developing reports to assess and monitor how patients use portals, including user measures, operations measures, and satisfaction measures

▪ *Patient Portal Tracking Reports* (White Mountain Research Associates) Example patient portal reports used to measure portal enrollment and engagement across dozens of indicators