SYNCRONYS Webinar Series

January 18, 2022

Click the link below for a reference guide focusing on searching and navigating patient records when you see more than one possible record for an individual patient. http://www.syncronys.org/wp-content/uploads/2022/02/SearchMultiplePtRecords.pdf





NEWS – WE'RE GROWING



WWW.INDEED.COM – SEARCH 'SYNCRONYS'





AT YOUR SERVICE

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Project Manager

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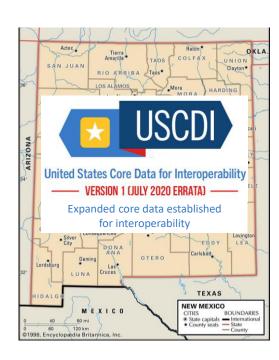
ENHANCING THE HIE HAS BROUGHT TOGETHER INNOVATORS . . .



. . . TO TRANSFORM LIVES & DELIVER HIGH QUALITY SOLUTIONS FOR HEALTHCARE IN NEW MEXICO



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OUR OBJECTIVE

Exchange a standard data set between hospitals, clinics, federally qualified health centers, prisons and detention centers, skilled nursing facilities, long term care, home health agencies, independent physicians and behavioral health clinicians.





USER SURVEY FEEDBACK

"The biggest need is filling information gaps. Having more entities provide up to date information is the key to SYNCRONYS success."

"Encourage more organizations to send more data, especially notes."



USER SURVEY FEEDBACK

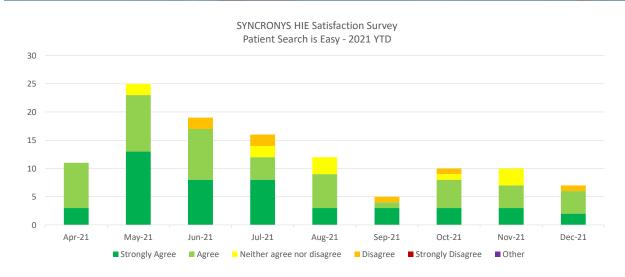
- Remind us where to find job aids.
- Suggestions that we can take to Orion Health.
 - Additional search criteria, e.g., by phone number and home address.
 - Pre-format date of birth field to include forward slash.
 - Change patient search tab order to default to demographic searches.
 - Provide county with other demographics.
 - Show insurance information.
 - Identify landlines vs. cell numbers.



SYNCRON

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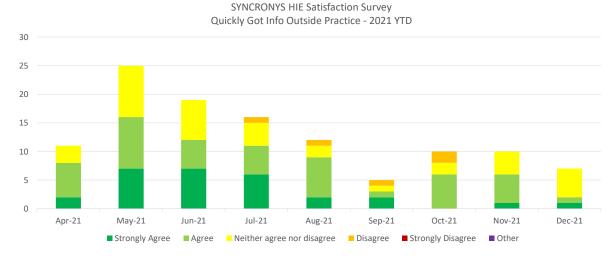
Patient Search is Easy



SYNCRONYS

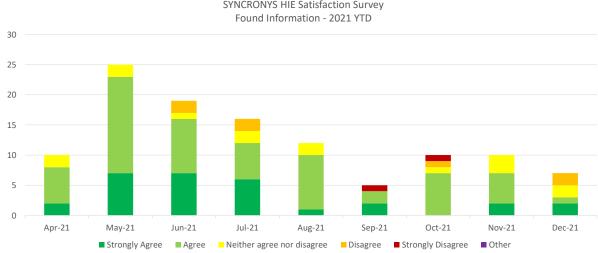
SYNCRONYS

Quickly Got Info Outside Practice



13

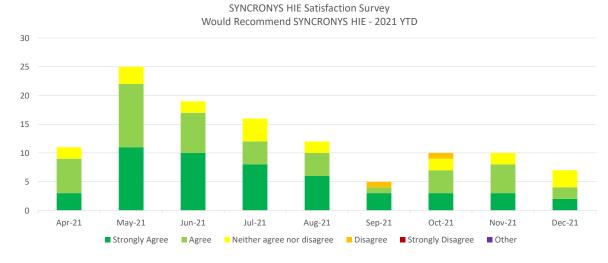
Found Information



SYNCRONYS HIE Satisfaction Survey

SYNCRONYS

Would Recommend SYNCRONYS



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User survey feedback

J	Identifier	Name	Date of Birth (Age)	Sex	Phone	Address	
ו	AEF-58. 6	Salisbury, April		Female	(505)30 992 (Home)	SAME ADDRESS	Jquerque, NM, 87110, USA
כ	AAY-825	SALISBURY, APRIL L	SAME DOB	Female	(505)30 -992 (Home)		LBUQUERQUE, NM, 87110 (Home)
					(505)938-9905 (Work)		
dd	checked results	to worklist 👻 Repla	ce worklist with checked re	sults v			

The most frequently mentioned dissatisfier is the volume of unmerged records for what seems like the same patient.

USER SURVEY FEEDBACK



- Very easy to use.
- Anytime Syncronys had updates they were very quick to update users and provide information around the update.
- The product and team are all great. They seem to think of what would be a good function well before we do.
- For our purpose, works fine.
- Thank you for doing this. Seamless care for New Mexicans! Please encourage all providers/organizations to sign up.



- Webinar topic January 18, 2022, user tips for patient search & selection
- Sending an email blast of tips to HIE portal users
- Developing additional training materials, based on the webinar
- Ongoing work on EMPI and unmerged patient records





"TIPS FOR USING THE SYNCRONYS HIE CLINICAL PORTAL"



April L. Salisbury, MBA-HCM Director of Onboarding and Training



PRESENTATION AGENDA

- Tips for any user searching for records
 - Patient Search, Selection, & Retrieval
 - Context Navigation
- Tips for <u>clinicians and their healthcare team</u> <u>members</u>
 - Timeline, Filters, Search tools for documents
 - Graphing numeric reports
 - Packaging and sharing data
 - Viewing images
 - New clinical documents (insights, assessments, summaries)



SYNCRONYS NOW HAS:

- Upgraded, HITRUST-Certified platform, Amadeus
- Advance Care Planning tools
- Circle of Care identification
- Transition of Care management
- ED, SUD, & MH Insights
- COVID19 results
- Hepatitis C summary
- Analytic tools
- Diagnostic quality images
- New print (PDF) options
- Medicaid claims data, including medications



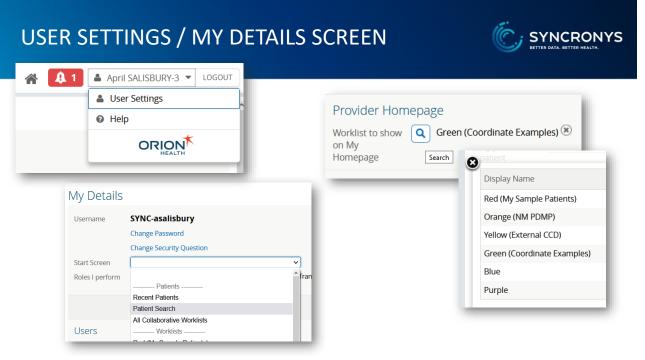
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Some survey requests can be addressed with tips or additional training:

- Set your Start screen / Home page preference
- Back button in search criteria fields, use Shift + Tab to go back
- Search for notes and labs use clinical documents search tools

← → C @ O P https://www.syncron	ys.org/onboarding/#training-needs			F 🖒
SYNCRONYS	SOLUTIONS ONBOARDI	NG RESOURCES	COMPANY	NEWS &
	Don't see what you DISCOVER CUSTOMIZ TRAINING	ED SOLUTIONS	ganization's tra	ning requi
ALL CLINICAL USERS PR	IVACY OFFICERS EN		LEVEL 4	SPE
SYLECTORYS THE WILL WILL WILL WILL WILL WILL WILL WIL	SYNCRONIS	A	RECENT	PATIENT SEA ATIENTS AN EXT NAVIGAT
(10:19 MIN.) Orientation to SYNCRONYS WATCH PRESENTATION HANDOUT	(5:44 MIN.) Logging In / Pass Requirements WATCH PRESENTATION HA			Gearching Records PRESENT





WAYS TO "GO BACK"



Click into the "hamburger"
to reveal the home screen's navigation menu

• Then use the menu to navigate to any screen you have permission to view.



Amadeus

PATIENTS
 Recent Patients
 Patient Search
 All Collaborative
 Worklists

Red (My Sample Patients) Orange (NM PDMP) Yellow (External CCD) Green (Coordinate Examples)

Blue Purple

- NOTIFICATIONS
- TASK LIST
- PORTAL MESSAGING
- ADVANCE DIRECTIVES AND MOST FORMS

WAYS TO "GO BACK"



• Use the Home icon, to go to the screen you chose in user preferences.



• Use Shift + Tab to go backward in the tab order for search fields.

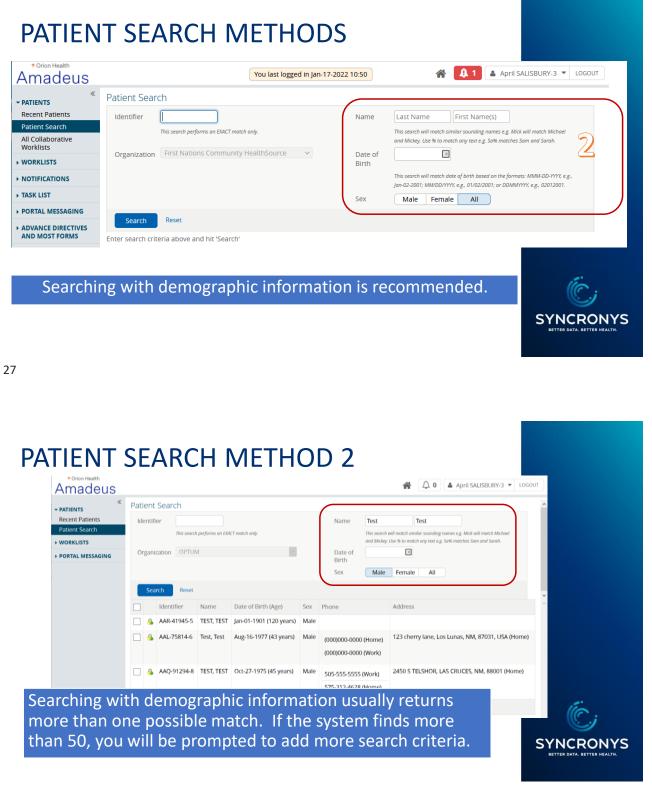
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PATIENT SEARCH METHODS

Amadeus	You last logged in Jan-17-2022 10:50 🚳 🔒 1 📤 April SALISBURY-3 🔻 LOGOUT
« PATIENTS	Patient Search
Recent Patients	Identifier Name Last Name First Name(s)
Patient Search	This search performs an EAAT match only. This search will match similar sounding names e.g. Mick will match Michael
All Collaborative Worklists	Organization First Nations Community HealthSource Organization First Nations Community HealthSource
WORKLISTS	Birth
NOTIFICATIONS	This search will match date of birth based on the formats: MMM-DD-YYYY, e.g., Jan-02-2001; MM/DD/YYY, e.g., 02/012001.
TASK LIST	Sex Male Female All
PORTAL MESSAGING	
ADVANCE DIRECTIVES	Search Reset
AND MOST FORMS	Enter search criteria above and hit 'Search'

- 1. Either by identifier number with associated organization, or
- 2. Using demographic information, i.e., Name, DOB, Gender





WHY AM I SEEING SO MANY UNMERGED PATIENT RECORDS IN THE CLINICAL PORTAL?

• SYNCRONYS has over 2,247,903 unique individuals in the HIE, as measured by distinct valid SSNs.



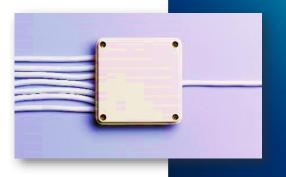
- Multiple data sources, with different business needs for capturing and sharing patient information.
- Certain data elements **must** match. (Some are not visible to you.) Some are heavily weighted, so if not entered correctly, it can prevent a merge.
- Key elements that help with matching include: 1) patient address, 2) patient SSN, 3) patient (home) phone number.



WHAT IS SYNCRONYS DOING TO MINIMIZE THE NUMBER OF UNMERGED RECORDS I SEE?

"SYNCRONYS is committed to solving this problem and has identified solving the unmerged records as a strategic initiative in 2022." ~ Terri Stewart, CAO

- Working several strategies now, e.g.:
 - Removing messages with no useful data. (e.g., old negative COVID19 results)
 - Carefully adjusting the merge criteria thresholds.
 - Accepting examples of unmerged patient records for investigation from users.





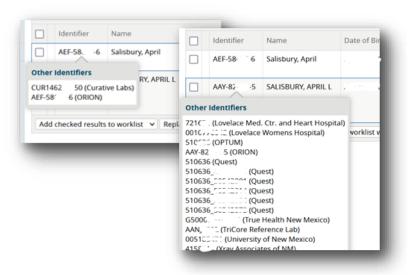
WHAT YOU CAN DO TO HELP MINIMIZE THE NUMBER OF UNMERGED PATIENT RECORDS

- Help ensure that key demographic elements needed for a match are complete and accurate in your EHR. (*i.e., first & last name, date of birth, patient home address, patient phone, and SSN if one is available*)
- If you find many unmerged records for what you think is the same patient, you can securely share this information with SYNCRONYS. (See handout for details.)
- Researching this information may lead to more strategies to minimize the problem of unmerged records and may allow us to merge the records that you help validate as the same patient.



WHEN THERE IS MORE THAN ONE, HOW CAN I KNOW WHICH RECORD I NEED?

- Hover your curser over the Identifier to see which data sources are included in that record.
- Choose the one with the most sources.
- Then use *Context Navigation* to see everything else.





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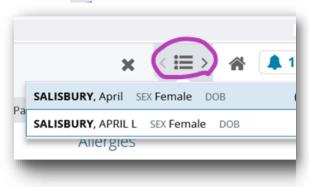
HOW CAN I VIEW ALL THE RECORDS DISPLAYED WITHOUT HAVING TO SEARCH REPEATEDLY?

Context Navigation Tool

The *context* is the list from which you selected a patient:

- Patient Search Result
- Recent Patients
- Worklists

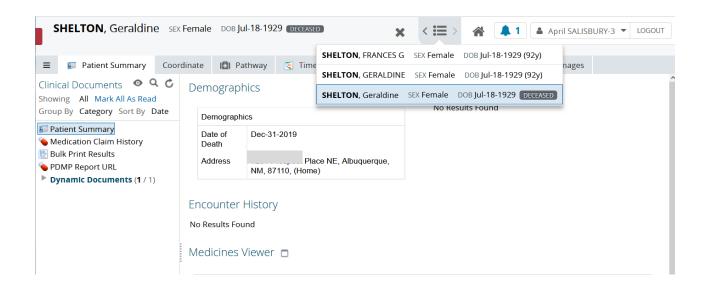
- > Next
- Show me the list



Patie	nt Search									
Iden	tifier				Name	Shelton		ieraldine Frances		
	Thi	is search performs an EXACT match	only.				illar sounding names e.g. Mick will match Michael and ny text e.g. Sa% matches Sam and Sarah.			
Organization				\sim	Date of Birth	Jul-18-1929				
							e of birth based on the formats: MMM-DD-YYYY, e.g., (, e.g., 01/02/2001; or DDMMYYYY, e.g., 02012001.			
					Sex	Male	Female	All		
5	Search	Reset								
	Identifier	Name	Date of Birth (Age)	Sex	Phone		Address			
Other	ABE-04314	-3 SHELTON, FRANCES	Jul-18-1929 (92	Female	(505 (Home)		(Home)	ST NE, ALBUQUERQUE, NM, 87110, US		
0015176809 (Lovelace Med. Ctr. and Heart Hospital) 929 (92 762747 (Lovelace Med. Ctr. and Heart Hospital)				Female						
110896 ABE-04	59 (OPTUM) 314-3 (ORIO	ace Womens Hospital) N) e Reference Lab)	929 ED	Female			(Home)	Place NE, Albuquerque, NM, 87110		
	•	· · · · · · · · · · · · · · · · · · ·	ist with check	ked results	~					

E 🖅 Patient Summary Coordi	nate 🖸	Pathway 🗧 Tim		ION, FRANCES G	SEX F	emale DOB Jul-18-19:		nages		
owing All Mark All As Read	Demographics			SHELTON, GERALDINE SEX Female DOB Jul-18-1929 (92y) SHELTON, Geraldine SEX Female DOB Jul-18-1929 DECEASED						
roup By Category Sort By Date	Other Ide	ntifiers	Emerge	ency Contact		Details	Reactions	Overall Severity	Onset Time	Ту
 Patient Summary Medication Claim History Bulk Print Results PDMP Report URL Dynamic Documents (1 / 1) Laboratory (78 / 78) Microbiology (4 / 4) Radiology (14 / 15) Transcribed Documents (15 / 15) 	Ctr. and H 762747 (L and Heart 00151768 Womens 1108969 ((OPTUM) 06 (TriCore	Name	APRIL		AMOXICILLIN-POT CLAVULANATE DIPHENHYDRAMINE HCL CEFACLOR			On Date 09- Feb-2019 On Date 09- Feb-2019 On Date 09- Feb-2019	Dri Alle Dri Alle
	Demographics Address					AMITRIPTYLINE			On Date 09- Feb-2019	Di Al
		NM, 87110, US (Home)				ERYTHROMYCIN			On Date 09- Feb-2019	Dr Al
	Phone	((Home)				INDOMETHACIN			On Date 09-	Dr Al

SHELTON, GERALDINE	SEX Female DOB Jul-18-1929 (92y)	★ < I > ★ 1 April SALISBURY-3 ▼ LOGOUT
E Patient Summary Coor	rdinate 🔯 Pathway 💽 Time	SHELTON, FRANCES G SEX Female DOB Jul-18-1929 (92y) SHELTON, GERALDINE SEX Female DOB Jul-18-1929 (92y)
Clinical Documents • • • • • • • • • • • • • • • • • • •	Demographics	SHELTON, Geraldine SEX Female DOB Jul-18-1929 DECEASED
Group By Category Sort By Date	Other Identifiers	No Results Found
Medication Claim History Bulk Print Results PDMP Report URL	Demographics	
Dynamic Documents (1)	Encounter History	
	No Results Found	
	Medicines Viewer	

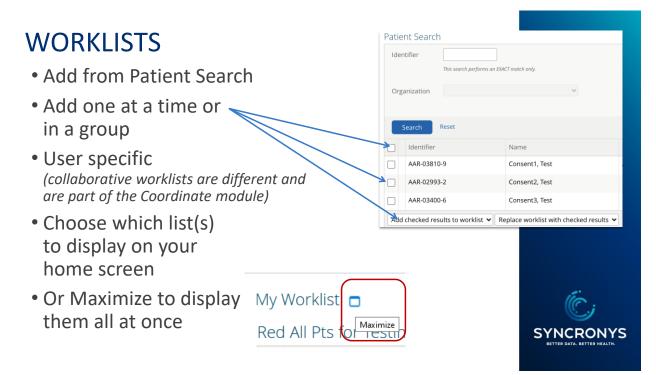


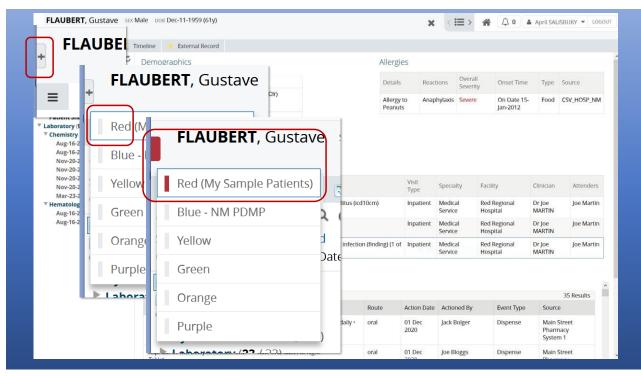
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WORKLISTS

- Worklists allow users to quickly access and manage patients
- Six worklists available user may rename
 - Red, Blue, Yellow, Green, Orange, Purple
 - Edit columns that appear on worklist
- 100 patients per worklist
- This worklist is full. To add to this worklist please remove at least 2.
- A user may wish to rename a worklist to follow a specific group of patients, e.g.:
 - Follow-up
 - By Care Team
 - By Condition







NAVIGATING THE PATIENT RECORD





MEDICATION CLAIM HISTORY



•	Ma	ale DOB	:011 (9y 11m)			×	A 1	▼ LOGOUT
😑 👔 Patient Summary 度	Timeli	ne 🛸 Exter	rnal Record 🛛 🧃	Payer Sourced Data	ges Adv	Directives/MC	DST	
Clinical Documents • Q C Showing All Mark All As Read		Fill Date	NDC Drug Code	Drug Description	Quantity	Days Supply	Prescribing Provider NPI	Pharmacy/Facility
Group By Category Sort By Date	9	Jun-27-2021	42192060816	GABAPENTIN 250 MG/5 ML SOLN	1450	90	1:	WALGREENS # 13927
Medication Claim History	9	Jun-03-2021	68462013001	ZONISAMIDE 100 MG CAPSULE	600	30	13	HIGHLAND PHARMACY
 Dynamic Documents (1 / 1) Laboratory (10 / 10) Radiology (2 / 2) 	9	Jun-24-2021	42806015033	AZITHROMYCIN 200 MG/5 ML SU	23	5	13(WALGREENS # 13927
 Unknown Category (1 / 1) 	9	Jun-21-2021	54838000650	VITAMIN D3 10 MCG/ML LIQUID	100	30	1	WALGREENS # 13927
	9	Jun-10-2021	64380097025	HYDROCORTISONE 5 MG TABLET	90	60	16(WALGREENS # 13927
	9	Jun-07-2021	62175011843	OMEPRAZOLE DR 20 MG CAPSULE	400	20	13069	WALGREENS # 11960
	9	Jun-02-2021	00574012901	CLINDAMYCIN (PEDI) 75 MG/5	500	11	136	WALGREENS # 13927
	9	Jun-02-2021	69238183107	LEVOTHYROXINE 50 MCG TABLET	30	30	1609*	WALGREENS # 13927

NEW CLINICAL DOCUMENTS

SYNCRONYS



PDMP (IF APPLICABLE) SYNCRONYS • The PDMP Report link performs an "API call" to the FLAUBERT, Gusta New Mexico Prescription Monitoring Program (PMP) to retrieve the patient's NARX report. It retains your user 😰 Patient Summary \equiv information, as well as the patient identifiers, so you Clinical Documents 🤷 don't have to log in and search another site. Showing All Mark All As Re The interface does not allow delegates to query the PMP Group By Category Sort By for a prescriber, so this is functional only for users with Patient Summary Rulk Print Results their own DEA number. 💊 PDMP Report URL Dynamic Documents (• If you want this feature and have your own DEA#, contact Laboratory (8 / 23) Radiology (23 / 27) our help desk to have it added to your user profile.

SYNCRONYS IS YOUR GATEWAY CONNECTION

eHealth Exchange What We Do ¥ Who's in Network The largest healthcare information network

in the country.

Active in all 50 states, eHealth Exchange is a Network of Networks also connecting federal agencies and non-federal healthcare organizations so medical data can be exchanged nationwide to improve patient care and public health.



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Resources *

https://ehealthexchange.org

YOU CAN QUERY THESE EXTERNAL **RECORDS AND MORE**

Advent Health

- Baptist Memorial Health Care (Tennessee)
- Centura Health (Colorado)
- Chevenne RMC
- Children's Hospital Colorado
- City of Ho
- Contra Co (Californ

- HASA (Texas)
 - Hawaii Pacific Health
- HealthCurrent (Arizona)
- HealthEast Care System
- HealthShare Exchange

Memorial Healthcare System

Midwest Health Connection

MMNCH: Clinical Integration

Nebraska Health Information

Connection (Georgia)

Initiative (NeHII)

Michiana Health Info, Network

IHIN (Iowa)

Carolina

- Northwestern Memorial Healthcare
- Norton Healthcare Novant Health
- OCHIN
- Office of Health Information

SYNCRONYS

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- SSM Health
- St. Luke's Health System
- Sutter Health Affiliates and **Community Connect Practices**
- Swedish Medical Center
- Tampa General Hospital

ehealthexchange.org/participants, <u>nttps:</u> Alliance Medical University of South

- Coordinated Care Health Network (Texas)
- Dignity Health (California)
- Fairview Health Services
- Franciscan Missionaries of Our Lady Health System
- Greenville Health System
- **Guardian Health Services**
- Guthrie Health

- Premise Health
- Providence Health and Services Alaska
- Providence Health and Services Washington
- Quality Health Network (Colorado)
- SacValley MedShare Samaritan Health Services
- South Dakota Health Link

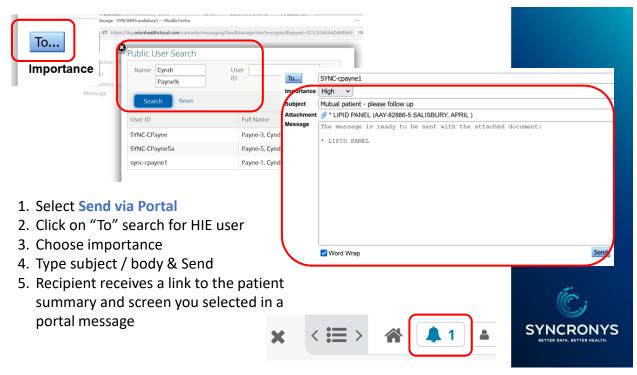
- UnitvPoint Health
- University of Calif. San Francisco
- Utah Health Information Network
- Vidant Health Western New York Clinical
- Information Exchange (HEALTHeLINK
- Yale New Haven Health

SHARING INFORMATION

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- Create a PDF:
 - Patient Snapshot
 - Print an Individual Result
 - Bulk Print Results
- Send the PDF via DIRECT Message or encrypted e-mail.
- Send a link to another HIE user via Portal Messaging.

dinate	🚺 Pathway 📑	Timeline	통 Exteri	nal Record	✔ More			
* LII	PID PANEL (10 months	ago)	Print	Print Send via Portal Download				
LIPID PANEL Cumulative « Show Older Show Newer »								
	Number	1 of 4	2 of 4	3 of 4	LATEST 4 of 4	Ref. R		
	Collected	20-Dec-18 08:18	16-Aug-19 08:12	14-Aug-20 07:25	12-Mar-21 08:01			
	Source	QUEST	QUEST	QUEST	QUEST			
	CHOLESTEROL, TOTAL	178	122	149	167	<200 (
	HDL CHOLESTEROL	* 37	* 36	§ * 45	§ * 40 BETTER DATA, BETTER HI	S EALTH.		
	HDL CHOLESTEROL	* 37	* 36	§ * 45	J	5		



SYNCRONYS

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ORION



- Clinical Documents Search Tools
- New Menu Items PDMP, Medication Claim History, Bulk Print Results, Advance Care Planning Tool
- New Tabs Images Tab & Payer Sourced Data (Coordinate & Pathway, if applicable)
- New types of clinical documents
- Custom Patient Snapshot (CCD)
- External Record

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BENEFITS OF ACCESSING THE HIE

		Mlan I
"UNM is able to look at the patient record, reduce duplicate services, target and query health issues to create service based on need, access better data, coordinate care and close gaps, and mo easier to value-based care." - Stetson Berg, MHA, Interim Director, UNM Center for Telehealth.	es of a patient's medical problems, especially when they're presenting	Why do you use the SYNCRONYS HIE??
"SYNCRONYS will help us get timely records so that the delay from cancer diagnosis to treatment is shorter, and by avoiding repeating tests, we can save money as well as avoid putting patients through more testing." - Barbara L. McAneny MD, AMA Former President, CEO New Mer Oncology Hematology Consultants, Itd	quality improvement activities and our HEDIS reporting). We use the data extracts to help identify members for	

S

YOUR CUSTOMER ENGAGEMENT TEAM



UNMH/SRMC | City, State, and Local Government | Fire/Rescue | Shelters – April Salisbury, Director Onboarding & Training asalisbury@syncronys.org; 505-938-9905

> Payers | PHS | City, State, and Local Government | Shelters – Terri Stewart, Chief Administrative Officer tstewart@syncronys.org; 505-938-9909



Ambulatory Clinic Groups/Systems | Specialty Clinics | Federally Qualified Health Centers – Renee Sussman, Customer Relationship Manager rsussman@syncronys.org; 505-938-9914





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YOUR CUSTOMER ENGAGEMENT TEAM



Hospitals (Western NM) | Indian Health Service | Tribal Health Systems/Clinics – Mona Benally, Customer Relationship Manager rbenally@syncronys.org; 505-938-9915

> Hospitals (East of I-25 and Metro) | Diagnostic Facilities – Victor Miramontes, Customer Relationship Manager vmiramontes@syncronys.org; 505-938-9902







Federal, State, and County Corrections Skilled Nursing Facilities | Long Term Care | Rehabilitation | Home Care | Hospice – Jerry Martinez, Customer Relationship Manager jmartinez@syncronys.org; 505-938-9916

QUESTIONS



CLINICAL DOCUMENTS

• Bulk Print Results feature

