

Objective 6-Measure 3: Patient Generated Health Data

Last Modified on 05/04/2022 1:32 pm EDT

About

The ability to request an edit of patient data is a feature that can be turned on in the **OP Practice Portal**. Below you will find instructions on how this feature is turned on and the workflow to update the patient record in OP.

Enable Patient Updates

1. Log in to the Practice Portal.
2. Navigate to **User Administration > Staff Members**. Select the user in the staff member list.
3. Locate the **Permissions** section and select the two permissions necessary to use this feature.
 - Expand **Patient Administration** and click the **Patient Updates** checkbox.
 - Expand **Patient Interface** and click the **Editable Patient Data** checkbox.
4. Log off the Practice Portal then log back in to view the Editable Patient Data section.
5. Navigate to **Portal Management > Patient Interface**.
6. Locate the **Editable Patient Data** section and toggle on which features to allow updates from the Patient Portal.

| Editable Patient Data | FEATURE | ACTIVE |
|--|-------------------|--|
| Select all functions that patients should have access to update within the portal. | Demographics | <input checked="" type="checkbox"/> ON |
| | Emergency Contact | <input type="checkbox"/> OFF |
| | Family History | <input type="checkbox"/> OFF |
| | Medical History | <input type="checkbox"/> OFF |
| | Social History | <input checked="" type="checkbox"/> ON |
| | Visits | <input type="checkbox"/> OFF |
| | Vitals | <input type="checkbox"/> OFF |

7. Click the **Save** button.

Update Patient Demographics and/or History

Information may be updated on the Patient Portal for demographics or history. Request are made by the parent/guardian/patient to change information and it is the responsibility of the practice to modify OP and accept or deny the request on the Practice Portal.

1. Log in to OP and select the **Unread Portal** tab in the Message Center.
2. In the Scope section, select **\$AD** from the staff drop-down list.
3. Select a message with the Subject of:
 - Patient Medical History Update
 - Patient Social History Update
 - Patient Family History Update
 - Patient Demographics Update

| Read | Patient Name | Subject | Date/Time of Message | Spoke With | Sender | Recipient(s) |
|--------------------------|----------------|--------------------------------|----------------------|------------|-----------------|--------------|
| <input type="checkbox"/> | DEY, MARTIN | Patient Medical History Update | 08/14/19 01:23 pm | | Web Portal User | Admin User |
| <input type="checkbox"/> | DEY, MARTIN | Patient Social History Update | 08/14/19 12:46 pm | | Web Portal User | Admin User |
| <input type="checkbox"/> | DEY, MARTIN | Patient Social History Update | 08/14/19 12:38 pm | | Web Portal User | Admin User |
| <input type="checkbox"/> | BOSCH, HARRY | Patient Family History Update | 08/14/19 12:31 pm | | Web Portal User | Admin User |
| <input type="checkbox"/> | BOSCH, HARRY | Patient Family History Update | 08/14/19 12:23 pm | | Web Portal User | Admin User |
| <input type="checkbox"/> | NEWMAN, ALICIA | Appointment Request | 08/12/19 07:56 pm | | Web Portal User | Admin User |
| <input type="checkbox"/> | NEWMAN, ALICIA | Patient Demographic Update | 08/12/19 06:34 pm | | Web Portal User | Admin User |

4. Navigate to the areas of the patient chart and make the requested changes.



Note: All changes must be made in OP to update the patient record on the Practice Portal.

Accept/Deny Updates on the Practice Portal

1. Log in to the Practice Portal and select **Updates** in Filter by: in Manage My Patients section of the Dashboard.

| PATIENT | LOCATION | APPOINTMENT TIME | REASON | DEMOGRAPHIC UPDATES | CLINICAL UPDATES | SUBMITTED FORM |
|--------------------|----------|------------------|--------|---------------------|------------------|----------------|
| TESTWEBINAR, CINDY | | | | No | Yes | No |

- (Optional) Modify the date range to locate the patient(s) requesting demographic or clinical updates.
- Click a patient in the list to display the Patient Account page.
- Click the **Patient Updates** tab to view the requests.

| GENERAL | BIRTHPLACE | CHILDREN | OCCUPATION | MARITAL STATUS | EDUCATION LEVEL | RETIRED | CARBON MONOXIDE DETECTOR |
|---------|----------------------|---------------------------|----------------------|----------------------|----------------------|----------------------|--------------------------|
| | No change (No value) | No change (Not Available) | No change (No value) | No change (No value) | No change (No value) | No change (No value) | No change (No value) |

| CAFFEINE | USES CAFFEINE | TYPE | AMOUNT PER DAY |
|----------|----------------------|----------------------|----------------------|
| | No change (No value) | No change (No value) | No change (No value) |

| EXERCISE | HEALTH/FITNESS CLUB MEMBER | FREQUENCY | HOURS/WEEK | ACTIVITY LEVEL | ACTIVITY DESCRIPTIONS |
|----------|----------------------------|-----------|------------|----------------|-----------------------|
| | | | | | |

5. Select the appropriate button to Accept or Reject updates.

| TOBACCO | SMOKER STATUS | AMOUNT PER DAY | TYPE | YEARS USING | QUIT ATTEMPTS | QUIT DATE | SECOND HAND EXPOSURE |
|---------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| | No change (No value) | No change (No value) | No change (No value) | No change (No value) | No change (No value) | No change (No value) | Yes (New) |

| FAMILY HISTORY UPDATES | NAME | RELATIONSHIP | BIOLOGICAL RELATIONSHIP | CONDITION (STATUS) |
|--------------------------|-------------------------|--------------|-------------------------|--------------------|
| <input type="checkbox"/> | Bruce Testwebinar (New) | Father (New) | Yes (New) | Asthma (New) |

- Reject Updates/Reject Selected Updates:** Message displays, click the **OK** to reject the changes or **Cancel**.

Are you sure you want to reject these updates? ✕

- Accept Updates/Reject Selected Updates:** Message displays, click **OK** to accept the changes or **Cancel**.

Are you sure you want to apply these updates to your system?

x

Cancel

OK



Note: You must accept or reject the updates to update the record appropriately on the Patient Portal.