

# athenaPractice / Flow Roadmap



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Chad Dodd

# athenahealth's vision

To create a thriving ecosystem  
that delivers accessible,  
high-quality and sustainable  
healthcare for all



## Supporting organizations with scale and solutions to improve their performance

### **athenaOne**

SaaS-based clinical workflows, RCM, population health, and patient engagement



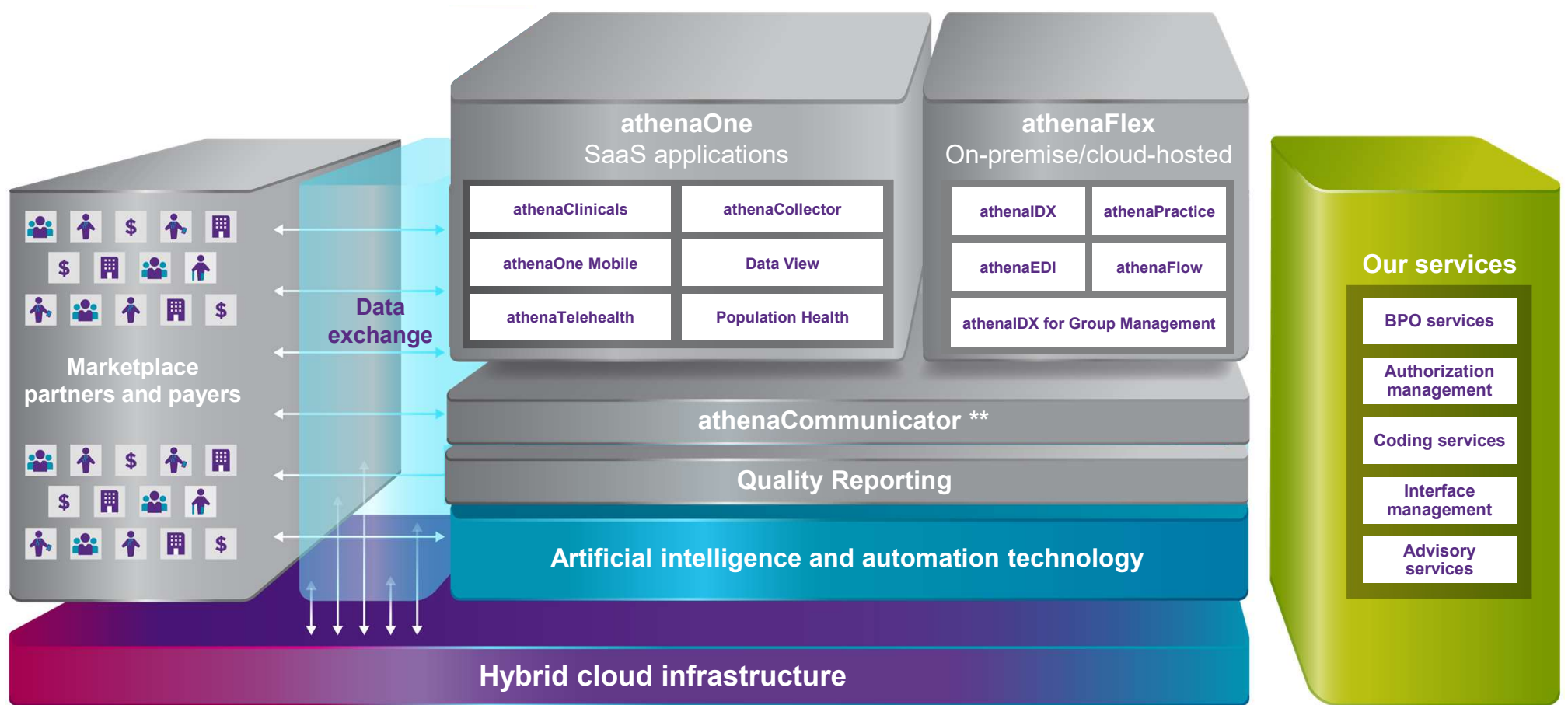
### **athenaFlex**

On-premise and cloud-hosted RCM, clinical workflows, and EDI services

### **epocrates**

Clinical decision support application for providers at the point of care and beyond

# Leveraging technology and expertise across athena



# Continuing to improve athenaPractice/Flow user satisfaction and outcomes

## Users enjoying an improved experience

*athenaPractice/Flow NPS*

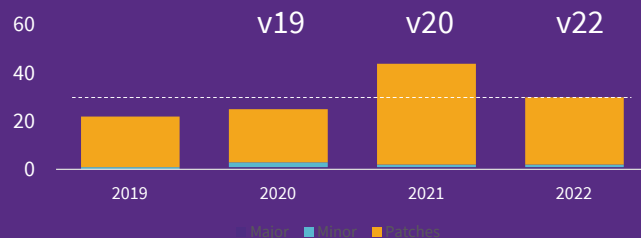


## Helping providers consistently perform

**99.85% of providers** are projected to receive a positive MIPS 2021 payment adjustments

**20% of providers** are projected to achieve exceptional performance

## Continuing to deliver releases (major, minor & targeted patches)



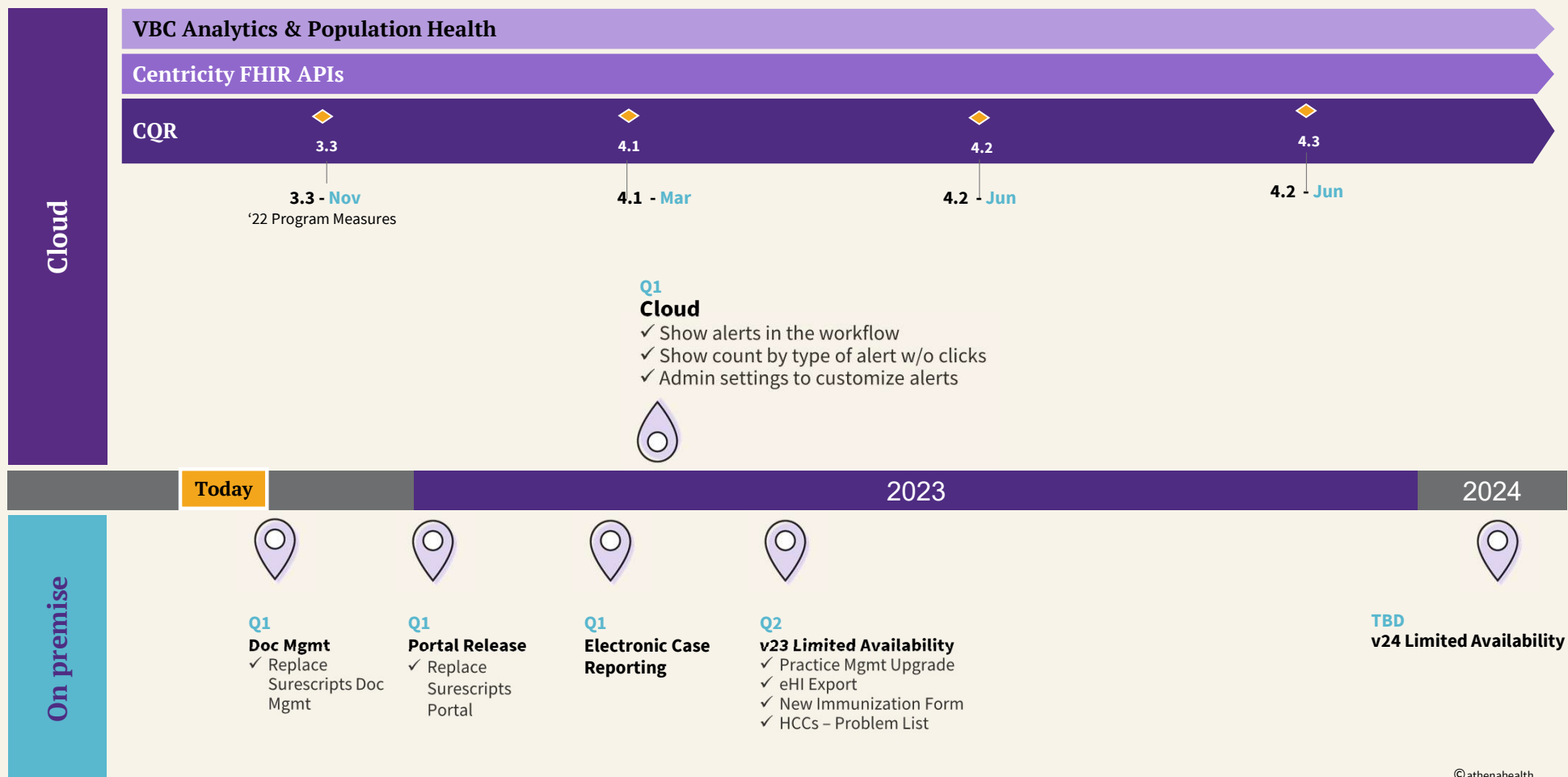
## Growing our APIs and connections

**46** Read APIs (21 Clinical, 16 system, 9 PM)

**15** Write APIs

**8** New PM in v23

# While continuing to release new features





## athenaPractice/Flow is a comprehensive practice management and clinical solution that aims to ...



**Optimize** practice tasks  
while streamlining  
appointments and billing



Increase **provider  
efficiency**

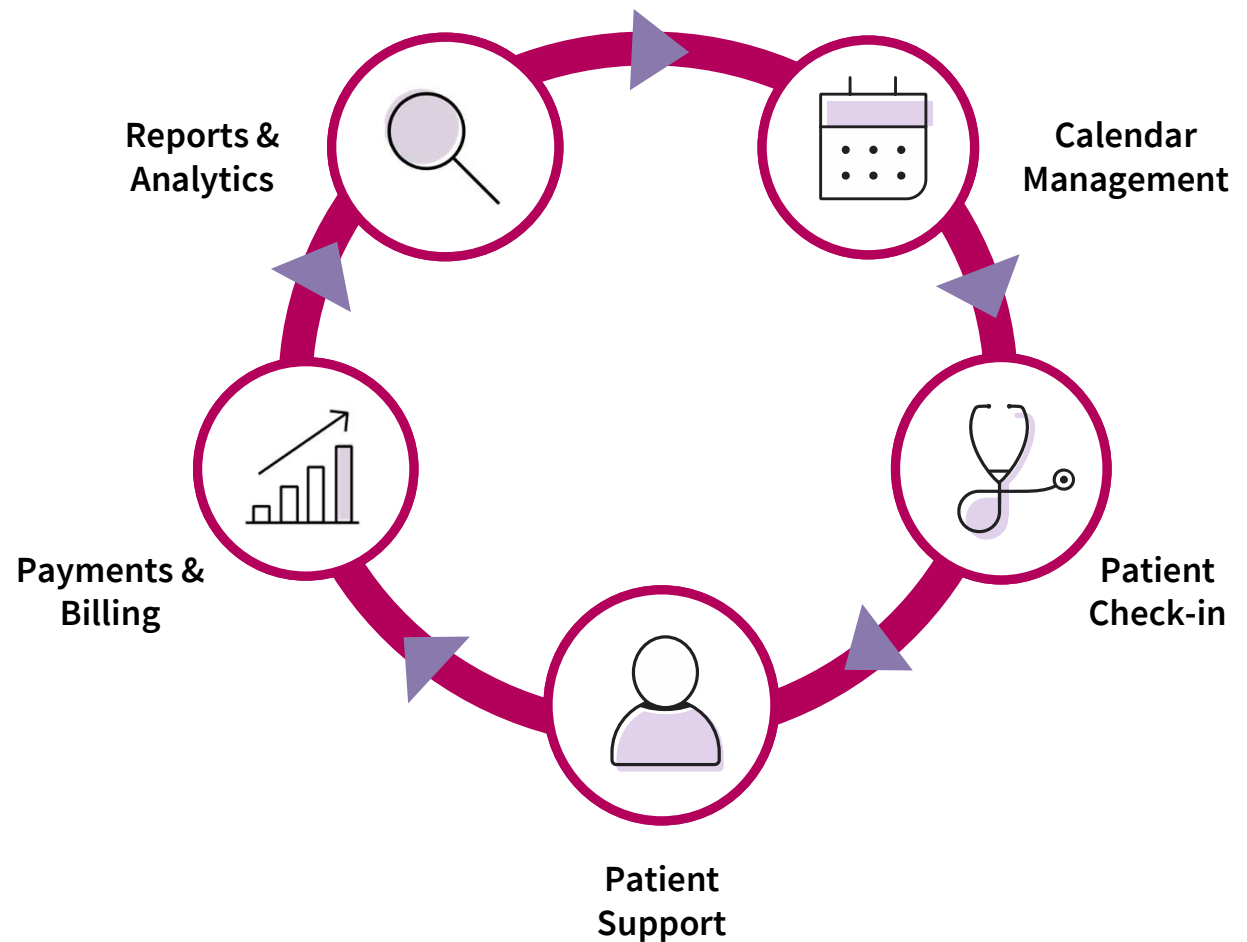


**Seamlessly integrate**  
with the healthcare  
ecosystem while being  
highly reliable.

# Optimizing practice tasks while streamlining appointments and billing



Our goal—  
to help **practices save  
time** with practice  
administrative tasks  
so that you can spend  
more time with  
**patients.**



# Visits | Improved user experience with enhanced performance

Underlying technology uplift and architecture to improve performance

Visit - - dacamara, alejandro D - 14491 (10/19/2022)

File Edit View Options Help

Resp, Provider: User010 ARNP, Luser L

Visit Description:

Status:

Visit Info **Filing 1** Filing 2 Filing 3 Filing 4 Dental Ambulance Notes Charges Transactions Correspondence Claims

Date of Illness:

Disability Dates:  From  To

Hospitalization Dates:  From  To

Condition Related To

☐ Employment ☐ Abuse ☐ Accident ☐ Responsible

☐ Auto ☒ Other

Accident Detail

Country code:  State code:  Time:

Outside Lab Charge:

Consult/Surgery:

Date last seen by Supervising:

PRO Approval Number:

Special Program Reason:

Estimated Date of Birth:

Delay Reason Code:

Service Authorization:

Med. Rec. Number:

Authorization Number:

Resubmission Code:

Emergency Indicator:

Local Use:

Local Use:

Supplemental Filing

Claim Type:

Other Insurance:

Secondary Insurance:

Status:

EPSDT Referral

☐ Homebound ☒ DME CMN Form ☒ Status Inquiry

Type of Bill:  LMP Date:

## Improved look

User interface re-imagined to enhance an end user's experience.

# Visits | Improved user experience with enhanced performance

Underlying technology uplift and architecture to improve performance

More Diagnosis

Visit - WRMC000006 - sensel, yajaira A - 10558 (11/30/2009)

File Edit View Options Help

Resp. Provider: mette MD, sulema Visit Description: Lorem ipsum Status: ✓ Collection

Visit Info Filing 1 Filing 2 Filing 3 Filing 4 Dental Ambulance Notes **Charges** Transactions Correspondence Claims

Charge Set Case Case set Fee Schedule 2010

**Diagnosis** ↑ ↓ New Modify Delete

	ICD Code	Code	Description	POA Ind
1	327.23	327.23	Obstructive sleep apnea (adu	
2	780.79	780.79	Other malaise and fatigue	
3	300.00	300.00	Anxiety state, unspecified	
4	305.1	305.1	Nondependent tobacco use c	
5	786.50	786.50	Unspecified chest pain	
6	99.19	99.19	Injection of anticoagulant	

**Procedures** ↑ ↓ New Modify Delete Auto Adjustment

	Code	Description	Diagnosis	M1	M2	M3	M4	DOS From	DOS To	Quantit	Fee	Co-Pay	Allow
1	99214	Established Patient	1,2,3,4					11/30/200	11/30/200	1.00	120.00	25.00	111.
2	81000	Urinalysis, by dip st	1,2,3,4					11/30/200	11/30/200	1.00	0.00	0.00	0.00
3	70130	Radiologic examin	1,2,3,4					11/30/200	11/30/200	1.00	0.00	0.00	0.00
4	33016	Pericardiocentesis,	1,2,3,4					11/30/200	11/30/200	1.00	0.00	0.00	0.00
5	33011	Pericardiocentesis,	1,2,3,4					11/30/200	11/30/200	1.00	0.00	0.00	0.00
6	76825	Echocardiography,	1,2,3,4					11/30/200	11/30/200	1.00	0.00	0.00	0.00

Tax 0.00 Total 120.00

**Billing Notes** Manage Billing Notes View Inactive List

Date	Note Subject	Note Text	Created By	Modified Date	Modified
10/19/2022 2:50:00 PM	Billing note 2	2nd billing note added	hwinston	10/19/2022 2:50:00 PM	hwinston
10/19/2022 2:49:00 PM	Billing note1	1st billing note added	hwinston	10/19/2022 2:49:00 PM	hwinston

More Procedures

# Proactive & actionable insights at the point of care

**In app alerts**  
Proactively validating data  
and giving alerts in the app

Visit - DB003812 - Iavorini Sr, genaro W - 15691 (11/19/2010)

File Edit View Options Help

Schedule

Resp. Provider: User021 MD, Luser J

Visit Description:

Status: In progress - Secondary

Visit Info Filing 1 Filing 2 Filing 3 Dental Ambulance Notes Charges Transactions

Ticket #: DB003812

Company - Required:    
 company is required.

Resp. Provider - Required: User021 MD, Luser J

Facility - Required: Duncan Bone & Joint

Referring: User021 MD, Luser J

Supervising:

Attending:

Operating:

Admitting:

Other Phys.:

PCP:

Resource: User021 MD, Luser J

Owner: None

Visit: 11/19/2010 10:15 AM

Entered - Required: 11/24/2010

**Insurance Carrier Information**

Move Up Move Down Set Carrier Auth/Ref

	Carrier	Number	Issued Date	Type	Expi
<input checked="" type="checkbox"/>	Medicare				
<input checked="" type="checkbox"/>	Medicaid				

Allocation Set - Required: 1 Copay

Financial Class - Required: Medicare

Benefit Assignment: Assigned

**Filing Method**

Filing Type: ☐ None ☐ Paper ☒ Electronic

Filing Method: HCFA

Patient Birthdate: 08/21/1930, 90 yrs

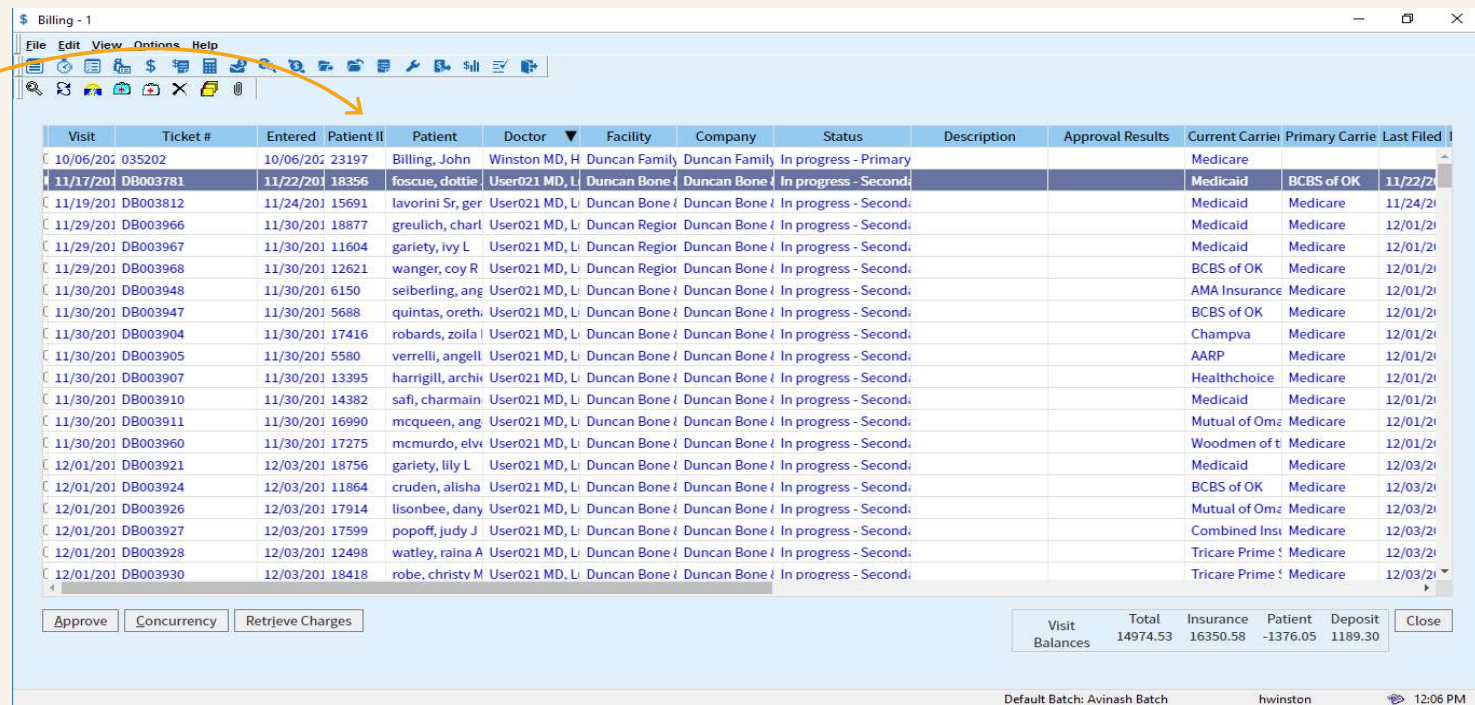
Patient Weight: 0.00 (none)

# Billing | Improved user experience with enhanced performance

Underlying technology uplift and architecture to improve performance

## Improved Sorting

Single click sort and multi-column sort by clicking the header



The screenshot shows a web application window titled "Billing - 1". It features a menu bar (File, Edit, View, Options, Help) and a toolbar with various icons. Below the toolbar is a table with the following columns: Visit, Ticket #, Entered, Patient ID, Patient, Doctor, Facility, Company, Status, Description, Approval Results, Current Carrier, Primary Carrier, and Last Filed. The table contains 20 rows of data. An orange arrow points to the "Ticket #" header, indicating the sorting functionality.

Visit	Ticket #	Entered	Patient ID	Patient	Doctor	Facility	Company	Status	Description	Approval Results	Current Carrier	Primary Carrier	Last Filed
10/06/20	035202	10/06/20	23197	Billing, John	Winston MD, H	Duncan Family	Duncan Family	In progress - Primary			Medicare		
11/17/20	DB003781	11/22/20	18356	foscue, dottie	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Medicaid	BCBS of OK	11/22/20
11/19/20	DB003812	11/24/20	15691	lavorini Sr, ger	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Medicaid	Medicare	11/24/20
11/29/20	DB003966	11/30/20	18877	greulich, charl	User021 MD, L	Duncan Region	Duncan Bone	In progress - Second			Medicaid	Medicare	12/01/20
11/29/20	DB003967	11/30/20	11604	gariety, ivy L	User021 MD, L	Duncan Region	Duncan Bone	In progress - Second			Medicaid	Medicare	12/01/20
11/29/20	DB003968	11/30/20	12621	wanger, coy R	User021 MD, L	Duncan Region	Duncan Bone	In progress - Second			BCBS of OK	Medicare	12/01/20
11/30/20	DB003948	11/30/20	6150	seiberling, ang	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			AMA Insurance	Medicare	12/01/20
11/30/20	DB003947	11/30/20	5688	quintas, oreth	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			BCBS of OK	Medicare	12/01/20
11/30/20	DB003904	11/30/20	17416	robards, zoila	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Champva	Medicare	12/01/20
11/30/20	DB003905	11/30/20	5580	verrelli, angell	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			AARP	Medicare	12/01/20
11/30/20	DB003907	11/30/20	13395	harrigill, archi	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Healthchoice	Medicare	12/01/20
11/30/20	DB003910	11/30/20	14382	safi, charmain	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Medicaid	Medicare	12/01/20
11/30/20	DB003911	11/30/20	16990	mcqueen, ang	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Mutual of Om	Medicare	12/01/20
11/30/20	DB003960	11/30/20	17275	mcmurdo, elve	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Woodmen of t	Medicare	12/01/20
12/01/20	DB003921	12/03/20	18756	gariety, lily L	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Medicaid	Medicare	12/03/20
12/01/20	DB003924	12/03/20	11864	cruden, alisha	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			BCBS of OK	Medicare	12/03/20
12/01/20	DB003926	12/03/20	17914	lisonbee, dany	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Mutual of Om	Medicare	12/03/20
12/01/20	DB003927	12/03/20	17599	popoff, judy J	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Combined Ins	Medicare	12/03/20
12/01/20	DB003928	12/03/20	12498	watley, raina A	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Tricare Prime	Medicare	12/03/20
12/01/20	DB003930	12/03/20	18418	robe, christy M	User021 MD, L	Duncan Bone	Duncan Bone	In progress - Second			Tricare Prime	Medicare	12/03/20

At the bottom of the window, there are buttons for "Approve", "Concurrency", and "Retrieve Charges". A summary box shows: Visit Balances, Total 14974.53, Insurance 16350.58, Patient -1376.05, Deposit 1189.30. The status bar at the bottom indicates "Default Batch: Avinash Batch", "hwinston", and "12:06 PM".



## Enhanced Integration Framework

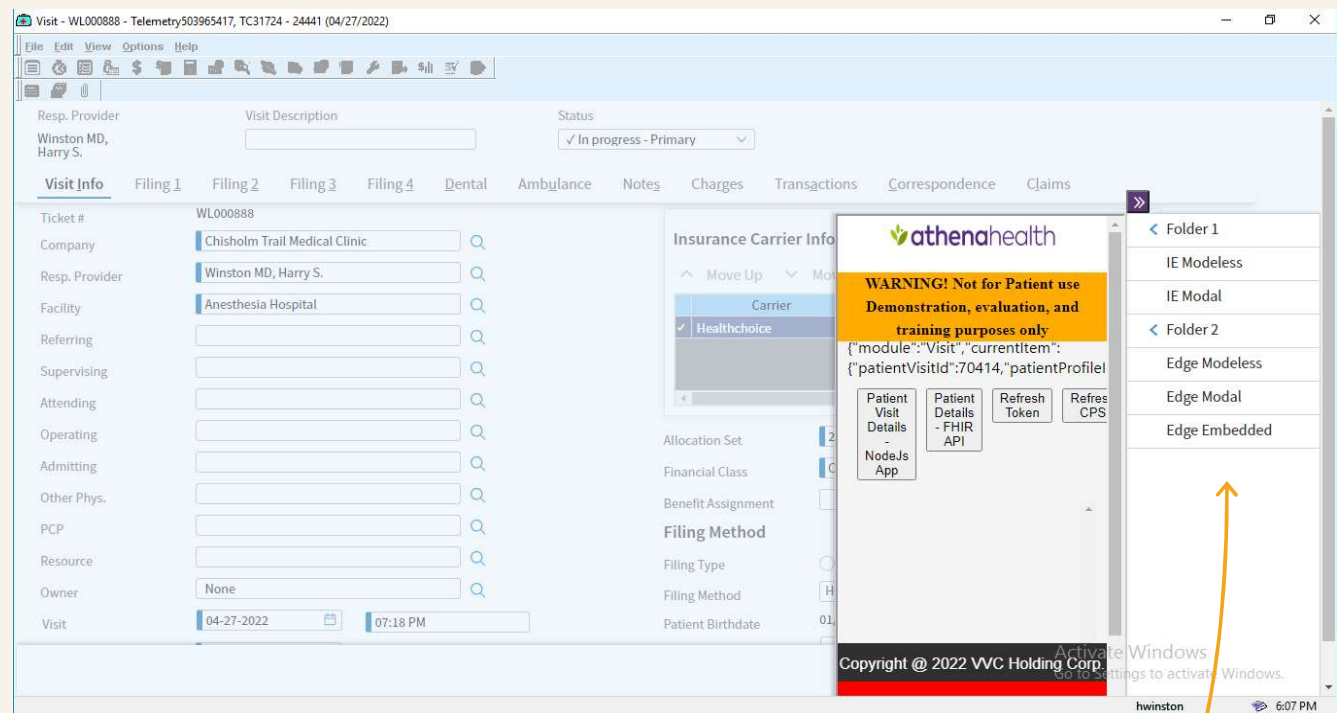
- ✓ New enhanced and secure FHIR integration framework

- ✓ New integration options:

- Launch in expanded form
- Launch in suppressed form
- Edge modal
- Edge embedded
- Edge modeless

- ✓ Partnering with

- Quatris Healthco
- Virtual Office Ware
- Visualutions
- SummitSoft Tech
- Unlimited



Edge Embedded Mode

# Automation | Batch Patient Statements

Reduce manual effort by leveraging automation

Manage Schedule

Dashboard

Company

- Select (Multi Select) | ▾

Facility

- Select (Multi Select) | ▾

Responsible Provider

- Select (Single Select) | ▾













Financial Class

- Select (Multi Select) | ▾

Clearing House

- Select | ▾

+ Create New

	Criteria Name	Last Run Date	Next Schedule	Status	Enabled	Statement	Actions
✓	DRH GP	05/12/2022 12:30	06/12/2022 12:30	Starts in 2 hrs	Yes		 
✓	WRMC	05/01/2022 12:30	06/12/2022 12:30	Success	Yes	WRMC-05012022	 
✓	LRMC	04/04/2022 10:00	05/04/2022 10:00	Failed	Yes		 
✓	Duncan International	03/04/2022 12:30	05/04/2022 12:00		No		 
✓	Velma Regional Medi	03/04/2022 18:00	05/04/2022 18:00	Completed with errors	Yes	Velma Regional M...	 
✓	DBH	03/22/2022 20:00	05/04/2022 20:00	In Progress Action	Yes		 

## Process Statements

Feature to schedule statements' processing. Works in the background Electronic & Paper

## One Stop Dashboard

Manage all user actions from one screen: Create & Manage; View status & Track Errors

CONCEPT ONLY

## Product Roadmap – other notable mentions

### Optimizing practice administration

Today (v22)	Tomorrow (v23)	On the HorizonFuture
<b>UX Uplift for Limited Availability</b> PM uplift is available for limited availability and for partner validation.	<b>Visits</b> Visits module uplift to new tech. Key workflows improved	<b>Automated Patient Eligibility Check</b> Create a schedule and act on exceptions. Improving cash collections.
<b>Regulatory</b> USCDI requirements Ability to store previous name & Address	<b>Billing &amp; Collections</b> Billing module uplift to new tech. Key workflows improved	<b>Flexible Schedule Template</b> Apply schedule Practice/Provider reqs (Every Other Friday, Every Third Friday etc)
<b>EDI plugins</b> All EDI plugins uplifted to new tech and improve supportability & longevity	<b>Balance Forward</b> Balance Forward module uplift to new tech.	<b>Enhanced Patient Appointment Status</b> Differentiate appointment status for checked-in patients
<b>Display Eligibility Status</b> Display eligibility status if verified within specified timeframe.	<b>Regulatory</b> EHI Export b(10) compliance tools. Ease of exporting data and regulatory compliance	<b>Enhance Patient Eligibility Responses</b> Manage “On-Demand” bulk Patient Eligibility request from a schedule
<b>Record Patients Prior Address</b> Ability to record a patient prior address with an effective time period	<b>New Integration framework</b> FHIR based custom apps integration with Billing, Collections & Visit modules.	<b>Visit Enhancements</b> Add additional fields on Insurance table & differentiate patient alerts

# Increases Provider Efficiency

# Medications | Streamlined alerts

The screenshot shows the 'Add Medication/Prescription' window in the PatientAdvisor system. The patient is Kara Whiteside, 69 years old, female. The search results for 'amox' show several amoxicillin formulations. Alerts for 'Diagnosis' and 'Duplicate Therapy' are displayed at the bottom right of the results list.

Medication	Brand	Generic	Alerts
amoxicillin tablet (generic)			
10 mg	P1	P2	
20 mg	P1	P2	
40 mg	P1	P2	
80 mg	NF, PA	P2	Notes (3)
amoxicillin-clarithromycin-lansoprazole combo pack (generic)			
amoxicillin tablet (generic)			
500 mg	P1		
875 mg	NF		
amoxicillin tablet, chewable (generic)			
amoxicillin-pot clavulanate suspension (generic)			
amoxicillin-pot clavulanate tablet (generic)			
amoxicillin-pot clavulanate tablet extended release 12hr (generic)			

## Formulary

Before selecting a med to prescribe, providers can see the number and types of contraindications and can drill down on each type for details

## Interactions

Before selecting a med to prescribe, providers can see the number and types of contraindications and can drill down on each type for details

## Dose check

Similar indicators shown immediately when dose is entered, before final review



## Medications | Pharmacy messages

**Pharmacy Messages**

View Messages For: All Providers | Message Type: All

Displaying 1 - 10 of 10 messages

**Demo B Limp** 09/09/1954 Female 123 New York, NY 25332 Mobile: (907) 060-5040

**atenolol 100 mg tablet** **Renewal Request**

**PRESCRIBED** [ atenolol 100 mg tablet ]  
**REQUESTING** [ atenolol 100 mg tablet ]  
Take 1 tablet by mouth every day  
**DISPENSE** 30 tablet **TOTAL FILLS** 1 Substitution Permitted  
**WRITTEN DATE** 11/18/2021

**RESPONSE**

**ACTION**  
None  
None  
Forward  
Remove  
Modify suggested  
Choose a new drug  
Deny  
Renew

**PROVIDER**  
Winston, Harry S.

**Office Comments**  
Enter comment

Ability to Change Location

### More Options

Clinical users see more options - responses automatically create a new RxRefill document add to document holding Medication lock

### Ease of Removing

Patient messages that don't have an appropriate match can be removed or denied

## HCC | Raise visibility of chronic disease risk

Find Problem

a01.0

Refine

Term	ICD10CM	HCC Code	HCC Coef
Typhoid arthritis	A01.04	39	0.431
Typhoid fever with heart involvement	A01.02		
Typhoid fever with other complications	A01.09		
Typhoid fever, unspecified	A01.00		
Typhoid meningitis	A01.01		
Typhoid osteomyelitis	A01.05	39	0.431
Typhoid pneumonia	A01.03	115	0.205

Most Specific

Typhoid osteomyelitis  
ICD10: A01.05  
HCC Code: 39 HCC Coef: 0.431

OK Cancel

### HCC Category

Highlight which problems impact Risk score calculation. Initial support for CMS HCC program, community-based population;

### HCC Coefficient

Display the coefficient used for risk factor calculation. Administrator can configure to hide coefficient in workflows, show only HCC as Yes Support CMS HCC v24 for 2022 payment year

# Simplified Workflows

Quick access buttons

## Logical flow

Review history  
Recommend orders  
Administer ordered  
Immunizations  
Plan for next  
immunizations due

## Age specific list

Age specific list  
Show what is relevant  
for adult patients based  
on their current age

Immunization Management										
History			Order		Administer		Upcoming			
Age - based view			Pediatric 0y to 10y		View by		Series age			
Vaccine	Series #	Status	Series 1	Series 2	Series 3	Series 4	Series 5	Series 6	Series 7	Series 8
COVID-19	-	Due								
DTAP	4	Due	03/04/2017 0y 2m	05/01/2017 0y 4m	07/04/2017 0y 6m	07/04/2018 1y 6m	Hx			
FLU	-	Due	02/10/2018 1y 1m	03/09/2019 2y 2m	09/09/2020 3y 8m					
HepA	2	Complete	06/05/2018 1y 5m	12/12/2018 1y 11m						
HepB	2	Immunity	10/02/2017 0y 9m	04/18/2017 0y 3m						
HIB	3	Complete	03/04/2017 0y 2m	07/04/2017 0y 6m	07/04/2018 1y 6m					
MMR	-	Due								
PneumoPCV	4	Complete	03/09/2017 0y 2m	05/09/2017 0y 4m	07/10/2017 0y 6m	07/09/2019 2y 6m				
Polio	3	Due	03/04/2017 0y 2m	04/06/2017 0y 3m	08/04/2018 1y 7m					
ROTAVIRUS	1	-	05/09/2017 0y 4m							
VARICELLA	-	Due								
Other Vaccines (No Data Available)										
Vaccines Not Given										

# Consistent Info Capture

**Scorecard** | Exclusions | 22 | 50 | 68 | 69/155 | 124/125 | 127/147 | 130 | 136 | 138 | 139 | 149 | Diabetic |

**Scorecard**

Legend: ✔ = Complete ✖ = Missing Data ✖ = Excluded/Excepted

CMS22 - Screening for High Blood Pressure	CMS50 - Closing the Referral Loop	CMS68 - Documentation of Current Medications
<span style="background-color: green;">CMS22</span> <span style="color: green;">✔</span>	<span style="background-color: yellow;">CMS50</span> <span style="color: red;">✖</span>	<span style="background-color: green;">CMS68</span> <span style="color: green;">✔</span>
CMS69 - BMI Screening and Follow-Up	CMS122 - Diabetes: Hemoglobin A1c Poor Control	CMS124 - Cervical Cancer Screening
<span style="background-color: green;">CMS69</span> <span style="color: green;">✔</span>	<span style="background-color: gray;">CMS122</span> <span style="color: red;">✖</span>	<span style="background-color: yellow;">CMS124</span> <span style="color: red;">✖</span>
CMS125 - Breast Cancer Screening	CMS127 - Pneumococcal Vac Status for Older Adults	CMS130 - Colorectal Cancer Screening
<span style="background-color: gray;">CMS125</span> <span style="color: red;">✖</span>	<span style="background-color: gray;">CMS127</span> <span style="color: red;">✖</span>	<span style="background-color: gray;">CMS130</span> <span style="color: red;">✖</span>
CMS131 - Diabetes: Eye Exam	CMS134 - Diabetes: Medical Attention for Nephropathy	CMS136 - Follow-Up for Children Prescribed ADHD Meds
<span style="background-color: gray;">CMS131</span> <span style="color: red;">✖</span>	<span style="background-color: gray;">CMS134</span> <span style="color: red;">✖</span>	<span style="background-color: gray;">CMS136</span> <span style="color: red;">✖</span>
CMS138 - Tobacco Use: Screening and Cessation	CMS139 - Falls: Screening for Future Fall Risk	CMS142 - Diabetic Retinopathy
<span style="background-color: green;">CMS138</span> <span style="color: green;">✔</span>	<span style="background-color: gray;">CMS139</span> <span style="color: red;">✖</span>	<span style="background-color: gray;">CMS142</span> <span style="color: red;">✖</span>
CMS147 - Influenza Immunization	CMS149 - Dementia: Cognitive Assessment	
<span style="background-color: green;">CMS147</span> <span style="color: green;">✔</span>	<span style="background-color: gray;">CMS149</span> <span style="color: red;">✖</span>	

HPI | Entry | PMH | FH | SH | Risk Factors | ROS | VS | PE

**CQM Measure Details**

Record numerator details, navigate to another form or record exception reasons

Aligns with workflow in Quality Reporting guide. Codes mapped

**CQM Scorecard**

Indicator for each quality measure indicates whether patient qualifies in denominator and whether data is missing data. Drill down for detail

**CMS22 - Preventive Care and Screening: Screening for High Blood Pressure and Follow-Up Documented**

Percentage of patients aged 18 years and older seen during the reporting period who were screened for high blood pressure AND a recommended follow-up plan is documented based on the current blood pressure (BP) reading as indicated

Sitting BP:  /  Vital Signs

**No Blood Pressure**

Reason for not recording blood pressure must be documented

No Systolic BP - Medical Reason:  OR No Systolic BP - Patient Reason:

No Diastolic BP - Medical Reason:  OR No Diastolic BP - Patient Reason:

Note: Only BP Sitting values are referenced

HPI | Entry | PMH | FH | SH | Risk Factors | ROS | VS | PE | Problems | CPQE A/P | Instructions/Plan | Copyright

# Interoperable

The screenshot displays the PRAPARE form interface, which is organized into three main sections: Personal Characteristics, Family & Home, and Money & Resources. Each section has a 'Decline to answer' option and a radio button to 'I choose not to answer' the questions in that section.

**Personal Characteristics**

Question	Current Value	Previous Value
1. Are you Hispanic or Latino?	Yes	
2. Which race(s) are you?	American Indian/Alaskan Native	
3. At any point in the last 2 years, has season or migrant farm work been your or your family's main source of income?		
4. Have you been discharged from the armed forces of the United States?	Yes	
5. What language are you most comfortable speaking?	English	

**Family & Home**

6. How many family members, including yourself, do you currently live with?	2	
7. What is your housing situation today?	I do not have housing (staying with others in a...)	
	Added Problem Homelessness	Remove Problem Homelessness
8. Are you worried about losing your housing?	Yes	
		Add Problem for Risk of losing housing
9. What address do you live at? (current address/location)		

**Money & Resources**

10. What is the highest level of school that you have finished?		
		Add Problem for education and literacy
11. What is your current work situation?	Full-time work	
		Add Problem for Unemployment
12. What is your main insurance?	None/uninsured	
		Add Problem for Uninsured
13. During the past year, what was the total combined income for you and the family members you live with? This information will help us determine if you are...		

## Structured data

CC Basic forms capture data critical for quality and public health reporting. Terms mapped to structured terminologies for each program

## Improved workflow

SDOH example - add or remove problems directly in the form



## Product Roadmap – other notable mentions

### Increase provider efficiency

Today (v22)	Tomorrow (v23)	On the HorizonFuture
<b>Meds</b> Modeless Med Management allows navigation within chart to find details	<b>Meds</b> FIE, Desktop error mgt., Doc location (340B), Reduced chaining, Rx via MEL	<b>Meds</b> Alerts in search results, drill down for detail & compound dose entry (e.g. tapered)
<b>Meds</b> Pharmacy messages; Non-clinical matches patients; agents renew from desktop	<b>Meds</b> Multi-patient mode allows providers/agents to match or deny, creates RxRefill doc	<b>Med</b> Match med list, highlight differences “Approved” keeps structured sig (no chain)
<b>Problems</b> Adv. problem search drills to billable codes Disease specific forms: HTN, DM	<b>Problems</b> Show CMS HCC in Adv. problem search edit and summary screens, New HCC MEL	<b>Problem</b> Add HHS HCC, highlighting HCC problems needing assessment each year in workflow
<b>Immunizations</b> Age Based vaccination History Views	<b>Immunizations</b>   New multi-tab form	<b>Immunizations</b> Multi-tab form with new forecasting engine
<b>Clinical Content</b> New form Pkgs Basic & Specialties (HTML form uplift, quality form)	<b>Clinical Content</b> SDOH – Problems via Social, Psych form Quality form replaces MU Core Checklist	<b>Clinical Content</b> Mapping Factory OBs to LOINC/ SNOMED CPT II – CAMS vs clicks

**Highly interoperable and reliable.**

# Interop Updates

## v22

- FHIR Read and Write APIs updated to R4
- Developers Portal and resources updated to R4
- CCDa updated to meet USCDI V1 standards and new data elements added such as Clinical Notes and Provenance
- Electronic Case Reporting (eCR) support
- FHIR Bulk Data Export (g.10) support

## v23

- Support for eHI Export (b.10)
- New custom APIs for PM data introduced
- Hospital Connect uplifted to support CDA 2.1
- Apple Health App integration introduced



## eCR. Easy as 1, 2, 3... 4, 5.

1

### **Provider enters information**

Healthcare provider documents patient visit information into athenaPractice or athenaFlow as part of their normal workflow.

2

### **Health technology sends information**

Criteria entered triggers an electronic initial case report (eICR) to automatically send (through FHIR API).

This includes medications, diagnosis, suspected disorders, lab orders, lab test results.

3

### **Reportability is determined**

Case report is automatically validated and if reportable, is forwarded to the appropriate agency.

Healthcare provider is notified via a chart document if a disease case is submitted.

4

### **Cases are analyzed and evaluated**

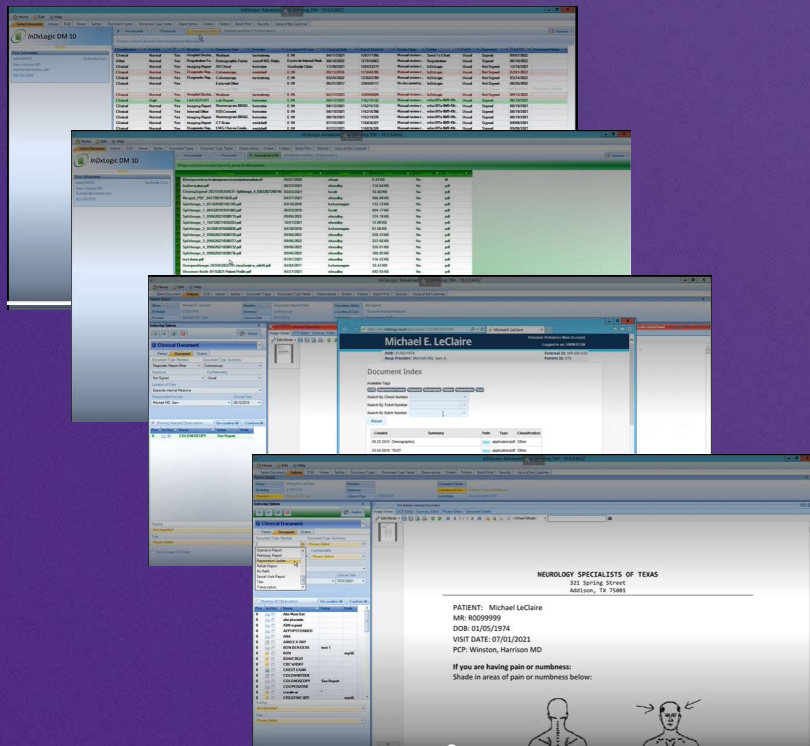
Public health authorities receive the disease case for analysis and evaluation.

5

### **Additional feedback is shared with provider**

The provider may receive guidance on patient care and outbreak response from public health.

# Announcing: InDxLogic



- ✓ Selected **InDxLogic** as the replacement solution for the Surescripts Document Management
- ✓ InDxLogic has been providing best in class document management products **since 2004**
- ✓ InDxLogic offers advanced capabilities such as **cloud based automated indexing, release of information (batch printing)**, and other features

## What's Next:

We will provide you with details to begin your transition to the InDxLogic DM in the coming weeks:

- This will include product demonstrations, transition support materials, training and other details
- We plan to begin migrating customers in Q4



# Announcing Medical Office Technologies (MOT): ezAccess and ezDirect

- ✓ Selected **ezAccess** and **ezDirect** as the replacement for Surescripts Patient Portal and Secure Messaging
- ✓ MOT has been providing patient portal and secure messaging solutions **since 2006**, widely adopted by the athenaPractice and athenaFlow customers today
- ✓ MOT solutions are **ONC Certified**, and support additional capabilities such electronic **Check in**, **Online Payments**, **Reminders** and **Surveys**.

## What's Next:

We will provide you with details to begin your transition to the **ezAccess and ezDirect** in the coming weeks:

- This will include product demonstrations, transition support materials, training and other details
- We plan to begin migrating customers in Q1

## 2023 Product Roadmap – other notable mentions

Enable success in value-based care by helping to improve patient outcomes

Today (v22)	Tomorrow (v23)	On the HorizonFuture
<b>Platform</b> Update to latest relied upon vendor releases (Microsoft, Citrix, Oracle, etc.)	<b>Platform</b> Update to latest relied upon vendor releases (Microsoft, Citrix, Oracle, etc.)	<b>Platform</b> Update to latest relied upon vendor releases (Microsoft, Citrix, Oracle, etc.)
<b>Interop</b> 46 FHIR API resources (21 Clinical; 9 PM; 16 System; 15 read and write)	<b>Interop</b> eHI Export support to meet b.10 Regulatory compliance (Including 8 new PM Custom Resources)	<b>Interop</b> Extend API resource support and add writable resources
<b>Interop</b> Electronic Case Reporting (eCR) Support via eCR Now App.	<b>Interop</b> Apple Health App integration to enable patient access to their health data	<b>Interop</b> FHIR R5 Uplift for API resources and updates to Developers Portal
<b>Interop</b> Uplift FHIR Platform to R4 while maintain support for R2	<b>Interop</b> Hospital Connect Support for CDA 2.1	<b>Interop</b> Hospital Connect – Improved data reconciliation and usability
<b>Interop</b> FHIR Bulk Data Export g.10 support	<b>Interop</b> eCR updates to version 3.0 eCR Now application	<b>Platform</b> Crystal Reports Uplift and full retirement of IE

# athenaOne Overview

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# athenahealth's SaaS-based platform has services powering industry-leading clinical, financial, and patient workflows

## Patient Engagement

- Patient outreach
- Scheduling
- Patient intake
- Drug couponing



## Clinician Experience & Support

- Care quality management
- Clinical documentation
- Patient records
- Care planning
- Telehealth



## Healthcare Payments

- Claims management
- Revenue cycle dashboards
- Performance reporting
- Medical coding
- Authorization management



## SaaS-based platform and services

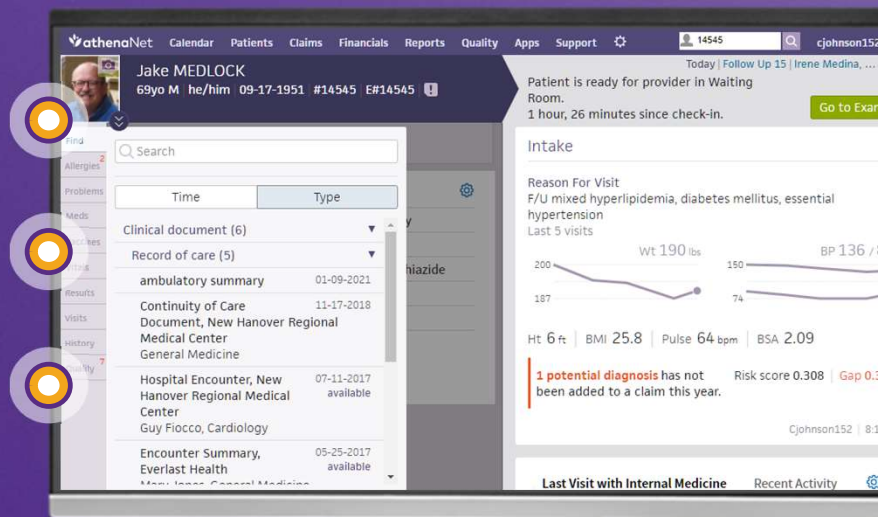
Enables critical functionality in payer/provider integration, analytics-driven solutions, ecosystem connectivity, AI-enabled insights and optimization

# Innovate faster by leveraging a SaaS-based model and an ever-evolving solution

Nightly software updates

Major enhancements made to athenaOne three times per year

SaaS-based model allows flexibility to smoothly pivot for urgent product needs



You talk, we listen

165+

customer feature/enhancement ideas implemented between 2020 and 2021





# Bringing in external data from across the ecosystem at the point of care to improve provider efficiency

## Integrated patient record sharing

Commonwell and Carequality data surfaces in our searchable timeline.

## Comprehensive network of receivers

View and select from a comprehensive network of labs and imaging centers.

## Vaccine data

State vaccine registry data is integrated and surfaced in the vaccines tab.

## Clinical decision support

Our Stanson Health integration presents recommendations at ordering, enabling easy compliance with PAMA requirements.

The screenshot displays the athenaNet interface for a patient named Sarah TEST. The interface is divided into several sections:

- Header:** Includes the athenaNet logo, navigation tabs (Calendar, Patients, Claims, Financials, Reports, Quality, Apps, Support), and user information (371612, jzoidberg, Log out).
- Patient Information:** Shows Sarah TEST, 60 yo, with dates of birth (05-29-1960) and medical record number (E#371612).
- Order Group:** Displays a list of orders for "thunderclap headache". The ordering provider is Cds Test, MD. A "Sign Orders (1)" button is visible.
- Decision Support:** A sidebar on the right provides recommendations for CT, BRAIN, W/ CONTRAST. It includes a "Recommendation for CT, BRAIN, W/ CONTRAST" section with a link to "View detailed guidance from Intermountain Healthcare". Below this, it asks "Which suggestion do you want applied?" and offers two suggestions: "Suggestion 1: Switch from CT, BRAIN, W/ CONTRAST to CT, BRAIN, W/O CONTRAST" and "Suggestion 2: Remove CT, BRAIN, W/ CONTRAST". An "Apply" button is at the bottom.
- Left Sidebar:** Contains a vertical menu with icons for Allergies, Problems, Meds, Vaccines, Vitals, Results, Visits, History, and Quality.

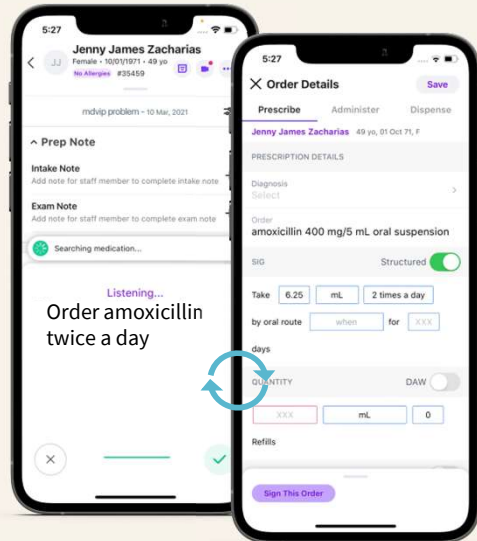
Lines connect the text blocks on the left to specific features in the interface: "Integrated patient record sharing" points to the patient timeline; "Comprehensive network of receivers" points to the "thunderclap headache" order; "Vaccine data" points to the "Vaccines" tab in the left sidebar; and "Clinical decision support" points to the decision support sidebar.

**18%** annual growth in global connections



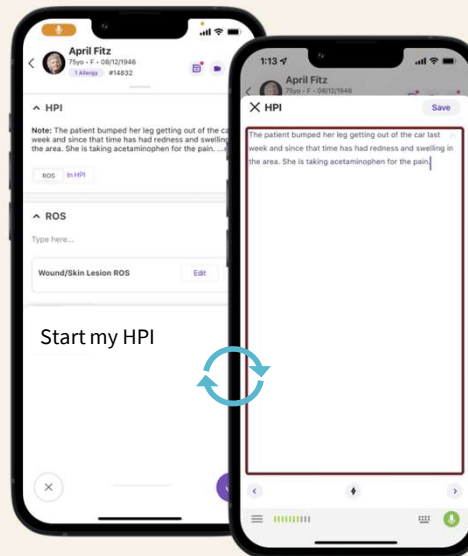
# Mobile + Voice Assistant | Simplified documentation, navigation, and task completion

Accelerate meaningful clinical tasks



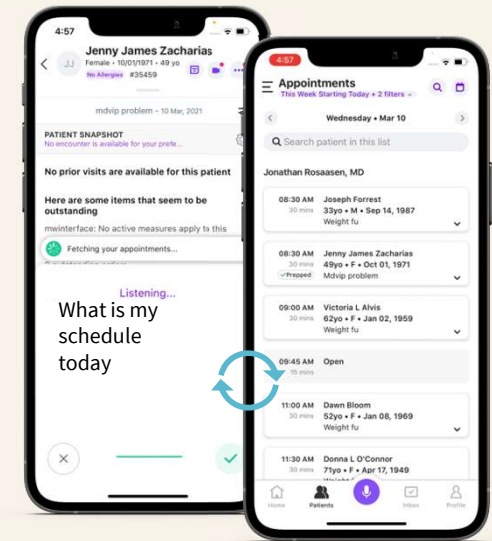
“Hey athena, order amoxicillin twice a day.”

Efficiently document patient visits



“Hey athena, start my HPI.”

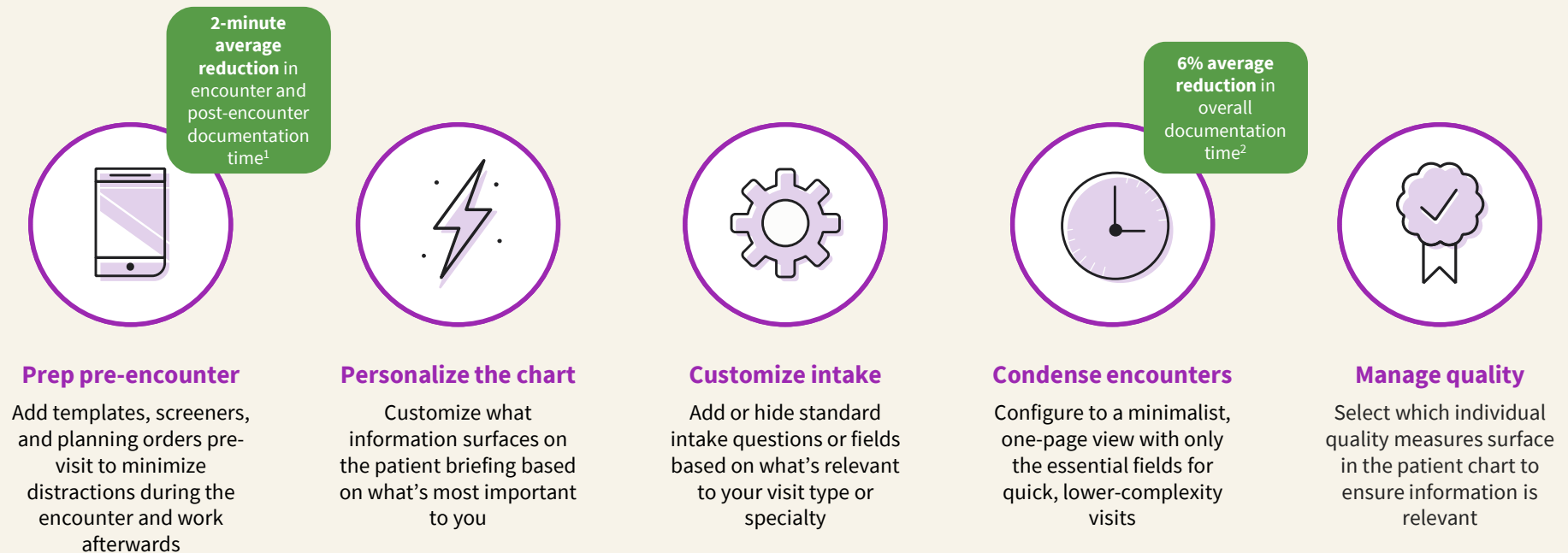
Quickly retrieve key information



“Hey athena, what is my schedule today?”

(Available now for add-on purchase)

# In 2019 we started our journey to develop **intelligent & configurable** clinical workflows



1. Compared to users' previous encounter workflows; based on athenaOne data as of March 2021.  
2. Compared to users' previous encounter workflows; based on athenaOne data as of March 2021.

# In 2022+, we continue with additional configurable options & specialty workflows allowing care teams to work how they want

## Self Service Quality Enrollments

Happy Valley Custom Program 2021

Measure	Enroll	Enroll	Enroll	Enroll	Enroll
Preventive Care and Screening: Body Mass Index (BMI) Screening and Follow Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preventive Care and Screening: Smoking for High Blood Pressure and Follow Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preventive Care and Screening: Tobacco Use Screening and Cessation Intervention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Diabetes Control	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preventive Care and Screening: Smoking for Depression and Follow Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preventive Care and Screening: Smoking for High Blood Pressure and Follow Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Controlling High Blood Pressure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2022

## Specialty-specific Encounters

Patient TEST

Specialty	Encounter	Enroll
Cardiology	Cardiology	<input type="checkbox"/>
Neurology	Neurology	<input type="checkbox"/>
Orthopedics	Orthopedics	<input type="checkbox"/>
ENT	ENT	<input type="checkbox"/>

2023 or later

## Referral Networks

Referral Networks

Referral Network	Enroll
Referral Network 1	<input type="checkbox"/>
Referral Network 2	<input type="checkbox"/>
Referral Network 3	<input type="checkbox"/>
Referral Network 4	<input type="checkbox"/>
Referral Network 5	<input type="checkbox"/>

2022

## Personalized Orders

Personalized Orders

Order for: [Patient Name]

Order Type: [Order Type]

Order Date: [Order Date]

Order Time: [Order Time]

Order Location: [Order Location]

Order Status: [Order Status]

Order Details: [Order Details]

2023

## Provider-Friendly Terms

Provider-Friendly Terms

Term	Enroll
Term 1	<input type="checkbox"/>
Term 2	<input type="checkbox"/>
Term 3	<input type="checkbox"/>
Term 4	<input type="checkbox"/>

2023 or later

## Problem List by Specialty

Problem List by Specialty

Cardiac and Vascular

- coronary artery disease
- cardiac palpitations
- atrial fibrillation, paroxysmal

Coag and Thromboembolic

- warfarin anticoagulation
- elevated INR

Endocrine and Metabolic

- DM type 2
- adrenal insufficiency, primary

2023 or later

# Freeing up our clients' staff by handling their most cumbersome work



**740 million**  
patient  
messages sent  
by athenahealth  
last year<sup>1</sup>

Hours of work  
saved per  
provider per  
week:  
**3+ hours<sup>2</sup>**

✓  
**Minimize the  
distractions from  
delivering  
care**

**Patient  
outreach**

**Patient record  
sharing**

**Electronic  
order  
submission**

**Clinical  
document  
processing**

**Result  
calls**

**95%**  
of prior  
authorizations  
obtained with  
zero customer  
work<sup>5</sup>

**29%** reduction  
in coding-related  
denials<sup>6</sup>

**Alleviates:  
3.86 min  
per claim<sup>3</sup>**

Reduces total  
task completion  
time by  
**88%<sup>4</sup>**

✓  
**Reduce the  
cost of  
getting paid**

**Eligibility  
checking and  
coverage scan**

**Authorization  
management**

**Self-pay**

**Coding**

**Claim prep  
and scrub**

**Claim  
submission**

**Denials  
resolution**

**Overpayment  
management**

**Remittance  
processing**

<sup>1</sup>Total automated patient messages delivered annually in 2020 across phone call, email, and text, including appointment reminders

Based on internal estimations of the average amount of time spent 2 managing inbound faxes, outbound faxes, and lab results, 3 performing pre-submission claim work, and 4 performing overpayment management work for 3,000 visits per year.

<sup>5</sup> Based on the performance of clients using the service, annualized data extrapolated from a three-month dataset from Sept-Nov 2020; <sup>6</sup> based on data for customers using the service for a minimum of 6 months as of November 2020

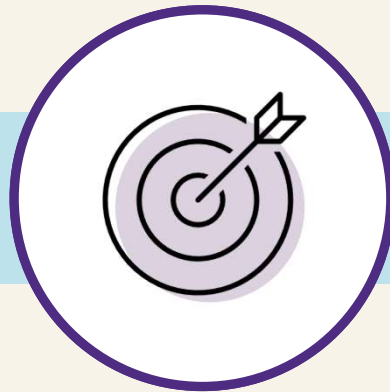
# Questions & Discussion



**It takes more than an EMR to deliver care today. We are working to provide a comprehensive clinical solution that ...**



Increases provider  
efficiency



Optimizes practice tasks  
while streamlining  
appointments and billing



And is highly  
interoperable and  
reliable.



Thank *you*