

OCHIN In Basket Approach

June 2022

NACHC Epic User Group

OCHIN

A driving force for health equity

Our Comprehensive Portfolio of Focused Solutions

As a trusted partner to a collaborative and growing network of health care providers nationwide, OCHIN helps you deliver more efficient, connected, patient-centered care for the diverse communities you serve.

- ▶ Improve your productivity and peace of mind with programs and tools reflecting **20+ years of practice-based research and solutions expertise.**
- ▶ As your single source for insight and innovation, we provide a **robust continuum of productivity resources**—informed by the largest community health data repository in the country.
- ▶ Our **integrated service portfolio** puts your organization, your patients, and your community at the center of equitable, sustainable health care transformation.



About OCHIN

UCHIN

With the largest collection of community clinical health data in the country and more than two decades of practice-based research and solutions expertise, OCHIN is a leader in equitable health care innovation and a ***trusted partner to a growing national provider network.***

6M+

active patients across

1,000+

health care delivery sites with

21,000+

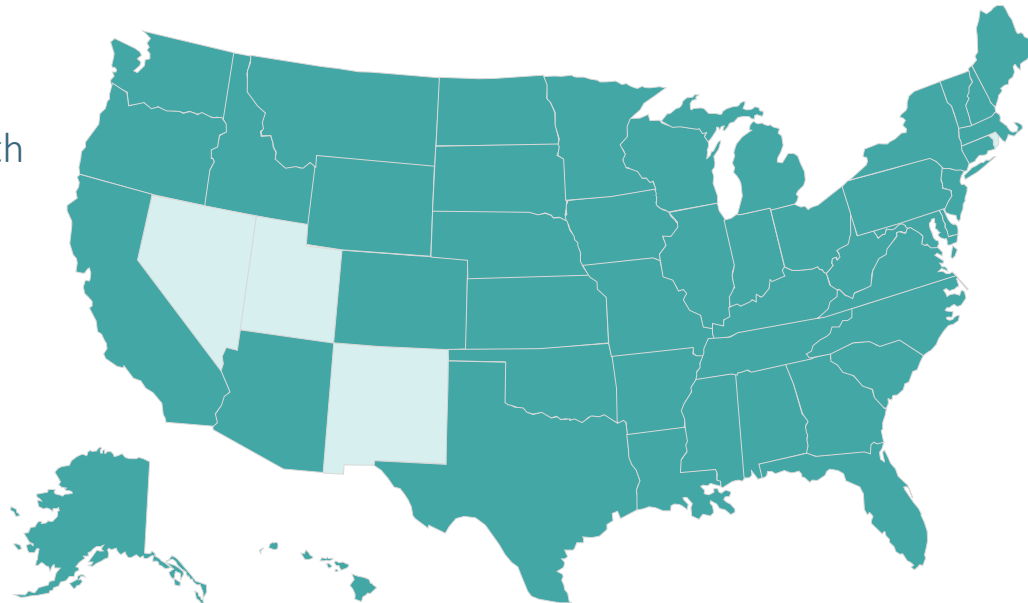
providers in

46

states with

272M+

clinical summaries securely
exchanged



21 years of serving



Rural Access Clinics



Federally Qualified Health Centers



School-based Clinics



Correctional Facilities



Behavioral Health Providers



Dental Clinics

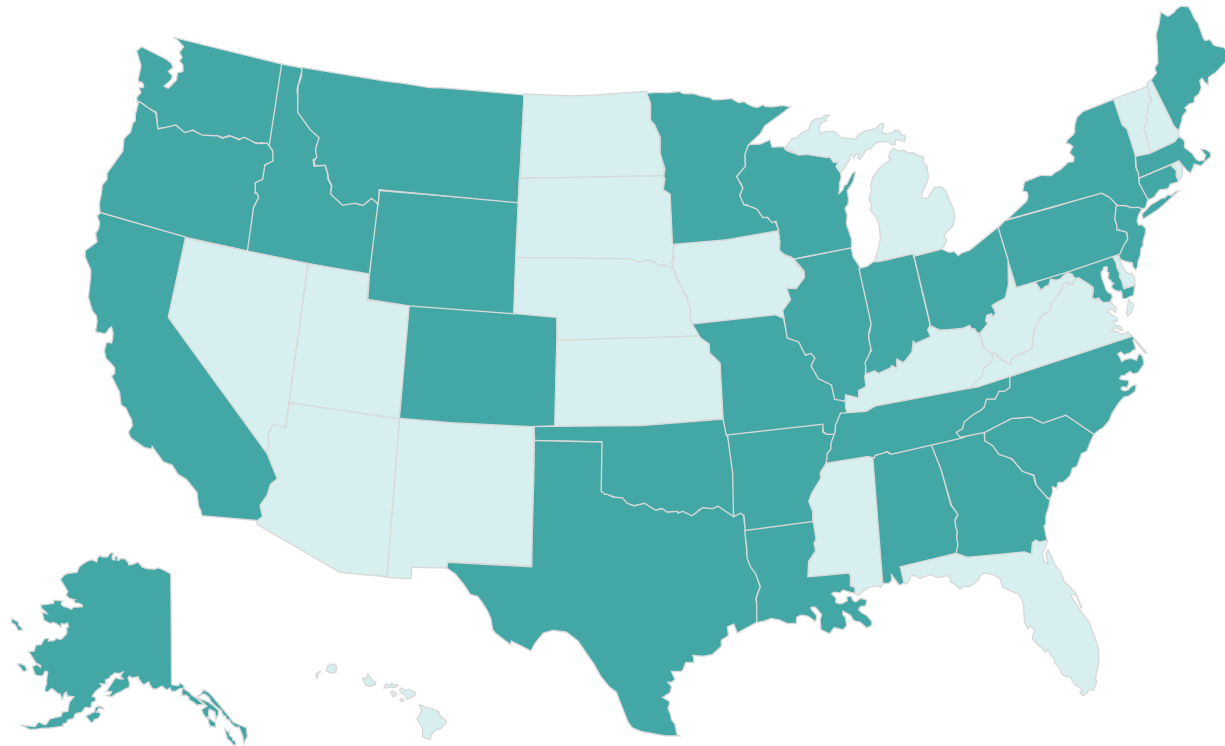


Public Health Departments



HIV/AIDS Care Organizations

About OCHIN Epic: Connecting Care Across 30 States



■ = OCHIN Epic States

4M

active patients across

171

organizations in

30

states with

60M+

clinical records
exchanged annually

Moving Data to Create a Nationwide Health Care System

239M+ Clinical Summaries exchanged since 2010

13M annual exchanges with non-Epic organizations

Regional Health Information Exchanges (HIEs): 22 contracted/legacy HIEs, **4** HIEs in pipeline

Community Referrals: 25 members live with **12** partners

Community Referrals: 20 health systems in pipeline

OCHIN leverages our resilient technology platform and ongoing member insights to create a more connected, dependable system of community care.



As of December 2021

Moving Data to Create a Nationwide Health Care System



State Registries

- **76** PDMP integrated members
- **10** members in process for PDMP
- **22** immunization registries (**19** bidirectional)
- **2** immunization registries in process

Laboratory

- **51** Labs (all bidirectional)

Electronic Case Reporting (eCR)

- **1.4M+** messages triggered by COVID events since April 2020

** PDMP = prescription drug monitoring program*

As of December 2021

Moving Data to Create a Nationwide Health Care System

Federal Partners

27K annual exchanges with Social Security Administration



250K annual exchanges with Department of Veterans Affairs



Carequality exchange framework



eHealth Exchange HUB two-way participant



OCHIN's In Basket Journey

In 2020, OCHIN sponsored an **In Basket Management Improvement Project**

- Response to member health centers requesting help and advice
- Providers and care teams felt overwhelmed by incoming messages
- Numerous message types indicate need for different approaches



Result: OCHIN's *In Basket Efficiency Setup and Support Guide*

In Basket Management: Enlisting the Care Team



- Many OCHIN members had a **default setup**.
- This led to a **high volume of messages** going directly to provider In Baskets:
 - ✓ Outside Events Messages
 - ✓ MyChart Advice Requests
 - ✓ Refill Requests
 - ✓ Scanned Documents
- In many cases, these messages could be **triaged** by other care team members.

Sample Recommendations for Message Types

Message Type	Recommended Approach/Recipient	Recommended Workflow	Message Notes/Distinctions
Outside Events Messages	Triage pool of care team members	<ul style="list-style-type: none"> Review for consult notes, results of outstanding diagnostic orders, hospital admissions/discharges Notify providers of relevant results; coordinate care transitions and ER follow-ups 	<ul style="list-style-type: none"> Often a blend of important and duplicate information, especially in the CHC setting Often too much information to review from provider's In Basket
MyChart Advice Requests	Triage pool of care team members	Triage like patient telephone calls	Smooth workflow helps ensure: <ul style="list-style-type: none"> Quick responses for patients Improved MyChart adoption
Refill Requests	<ul style="list-style-type: none"> When direct from SureScripts, to providers Otherwise, through triage pool 	Take advantage of refill protocols wherever appropriate	Can be addressed quickly when teed up for provider

Sample Recommendations for Message Types

Message Type	Recommended Approach/Recipient	Recommended Workflow	Message Notes/Distinctions
Scanned Documents	<ol style="list-style-type: none">Sort by document type and attach to orders where relevantForward to provider/other appropriate staff, or file without message where appropriate		<ul style="list-style-type: none">Many CHCs receive large fax volumes, which are difficult to manage unless well-organizedOften, provider review unnecessary
Overdue Results	To clinical support staff or lab pool	Review for missed results or tests	<ul style="list-style-type: none">An important safety check, especially for tests performed outside the health centerCan be numerous and hard to manage

In Basket Experience: Continued Monitoring



In Basket Dashboard

- Tool within Epic
- Helps supervisors identify overdue message responses and staff who may be struggling

Signal

- Available from Epic
- Identifies usage patterns across Epic, including In Basket.
- Can also identify message volumes, related patterns, and improvement opportunities

Tableau

- Monitors collaborative-wide for In Basket usage patterns

In Basket Experience: Lessons Learned

1

Adopting new workflows is challenging

Requires significant effort, even with best practice recommendations available

2

Community health centers are diverse

Roles, tasks, and support systems vary widely across the OCHIN collaborative and need attention

3

Patient information volume is high

EHRs are adept at accommodating these large volumes—so strategize and organize to optimize this capability

4

Continuous improvement = best experience

OCHIN continues to monitor usage patterns and gauge member feedback, adopting new tools/functionality



Meeting You Where You Are to Create a More Connected, Efficient System of Care



Moving Data More Effectively

Take advantage of **versatile tools and capabilities** that create a more connected, efficient nationwide health system.



Enlisting the Care Team

Identify key challenges associated with incoming messages to triage communications across the entire care team, **boosting your peace of mind while reducing provider burden.**



Continuing to Monitor and Adapt

Communication is key across the OCHIN collaborative, so experiences can be tracked and assessed—resulting in **more efficient workflows** that address your community's specific needs.

Thank You

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www.ochin.org



AnnMarie Overholser, MD
overholsera@ochin.org