

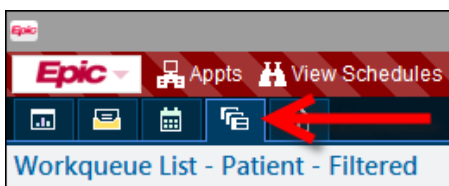
Patient Gateway Enrollment Workqueue

This tip sheet outlines how to access and use two MGH workqueues for Patient Gateway enrollment. These workqueues contain patients who currently do not have an active PG account and staff need to reach out to enroll. They are broken out into patients who have an upcoming appointment and patients who've had an appointment in the last 30 days.

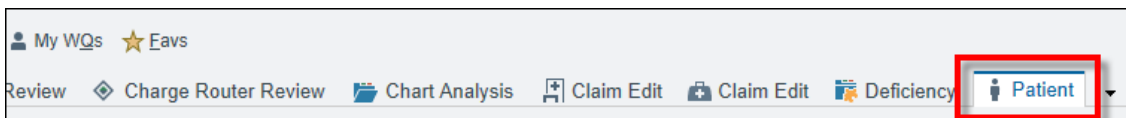
Workqueue Name	Description	Parameters
MGH Patients not Active PPG Users Upcoming Visits [26981]	Patients with a visit scheduled in the next 30 days who are inactive in PG	<ul style="list-style-type: none"> • Patient 18 years or older • No duplications - patient only appears once even if scheduled for multiple appts in same or other MGH DEPs
MGH Patients not Active PPG Users Past Visits [27024]	Patients who had a visit in the last 30 days and are inactive in PG	<ul style="list-style-type: none"> • PG status of blank, inactive, code expired, or declined

Accessing the PG Enrollment Workqueues

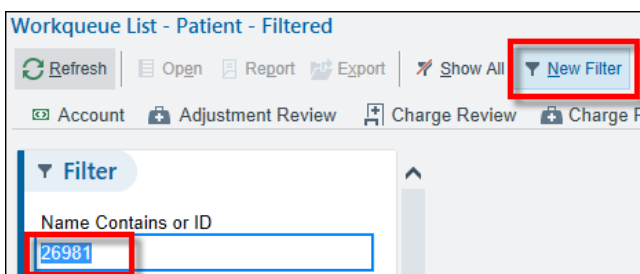
1. Click the **Workqueue List** tab or click **Epic > Scheduling > Workqueue List**.



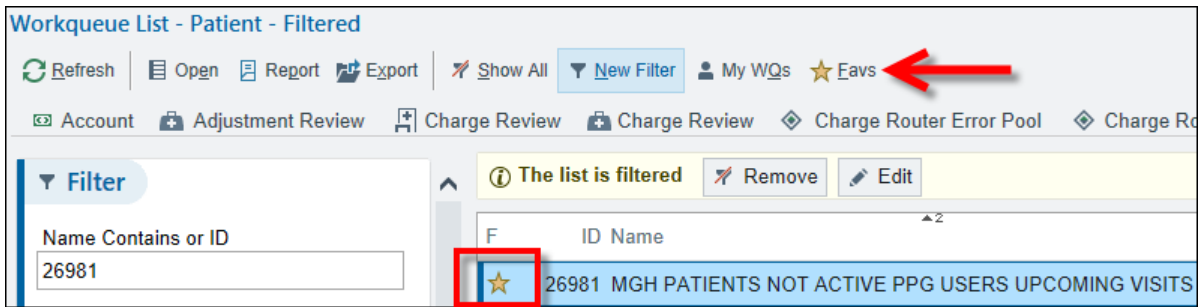
2. From the top of the Workqueue List, click the **Patient** tab.



3. To find the workqueue, click the **New Filter** button.
4. In the **Name Contains or ID** field, type **"26981"** for future appointments or **"27024"** for the past appointments.



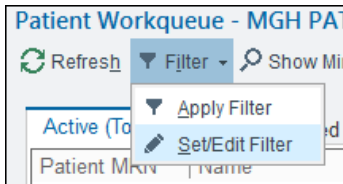
5. Click **Apply**.
6. Click the **star** icon to make the workqueue a favorite. In the future, click the 'Favs' button on the toolbar to easily access.



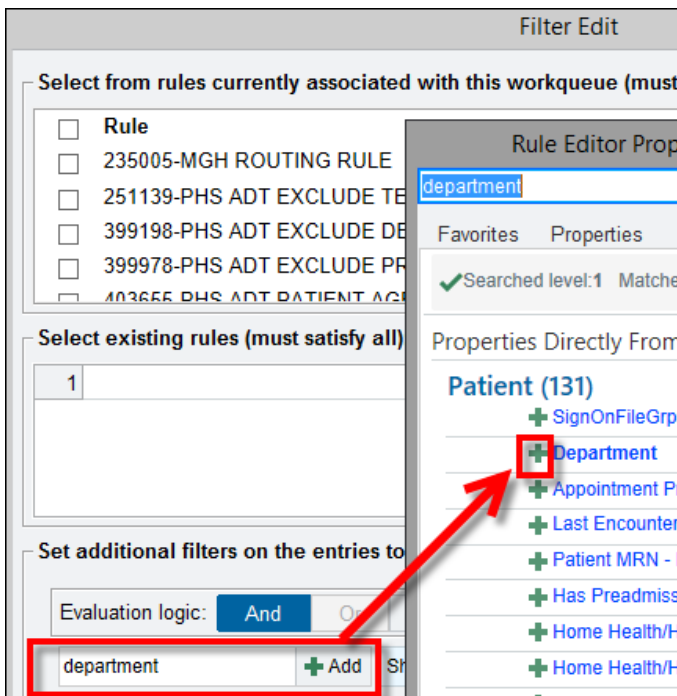
7. Double-click the workqueue to open it.
8. **Filter** workqueue based on patients assigned to you by your Manager/Lead PSC.
9. Click on any of the column headers to **sort** the workqueue list. You can also drag and drop columns in desired locations on the workqueue.

Daily Workqueue Assignments (Manager or Lead PSC)

1. Open the workqueue (upcoming or past appts) and filter for your DEP(s).
 - a. From the workqueue toolbar, click **Filter > Set/Edit Filter**.



- b. In the Evaluation logic search field, type “**department**” and then click the **Add** button.



- c. In the **Operator** field, select the = sign.

d. In the **Value** field, type your department name.

- Repeat steps b-d to add additional DEPs, but ensure Evaluation logic is set to **Or**.

#	Property	Operator	Value
1	Patient » Department	=	MGH NEURO ENDO COX1 [10020010145]
2	Patient » Department	=	MGH REVERE BROADWAY [10020380001]

e. Click **Accept**.

- Assign out to staff** to avoid duplicate calls to the patient (e.g., patients with Spanish preferred language to Spanish speaking staff and then remaining patients divide up among staff by provider, appt date, patient last name, etc.).
- Repeat** throughout the day, as needed, depending on volume.

Contacting Patients (Able to Reach)

- Review the **Preferred Phone** number and **Preferred Language** columns and contact the patient.
- If not calling from the office, use [Doximity](#) to mask your personal phone number.
- Utilize below scripting for patient enrollment:

Future Visit WQ Scripting	Past Visit WQ Scripting
<p>See Standalone Virtual Visit User Guide Or See Epic Integrated Virtual Visit User Guide (Epic Integrated departments only)</p>	<p><i>“Good <morning/afternoon>. This is <name> from Massachusetts General Hospital. I’m calling to check in with you during this difficult time and to let you know that one of the best ways to keep connected with details from your past appointments and any future appointments is to enroll in Patient Gateway. The enrollment process is easy, and I can help you get set up right now.”</i></p>

(if patient is reluctant – give them the benefits)

- Request prescription refills
- View test results
- View appointment & receive email reminders
- Complete questionnaires
- Communicate directly with your care team
- Verify insurance
- eCheck-In
- Pay copays (when required)

If patient is willing to enroll...

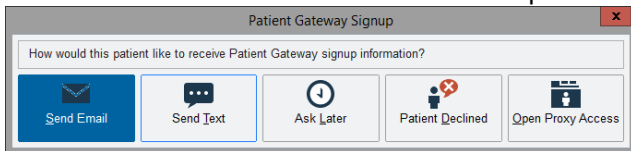
1. Tell patient –

“All we need to do to get you enrolled is to send you a link and once you click on that link, you'll be taken to the Gateway website. Would you like to receive that via e-mail or text? Once you click on the link, you'll be asked to verify your identity, create a user name and password, and accept the terms and conditions. Would you like me to stay on the line and assist while you enroll?”

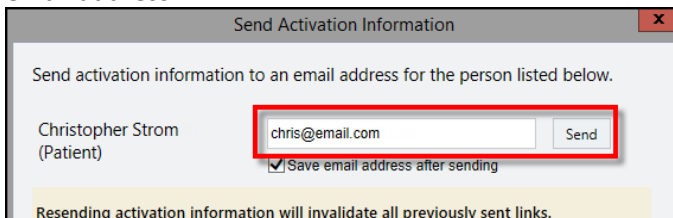
2. From the workqueue click the **Registration** button on the toolbar.
3. Click the **Patient Gateway icon** in the Storyboard.



4. Click **Send Email** or **Send Text** based on the patient’s preference.



5. Ask the patient to confirm either their email or mobile phone number. If no email is on file, enter the email address.



6. Click **Send**.
7. Click **Finish** to close the Registration activity.

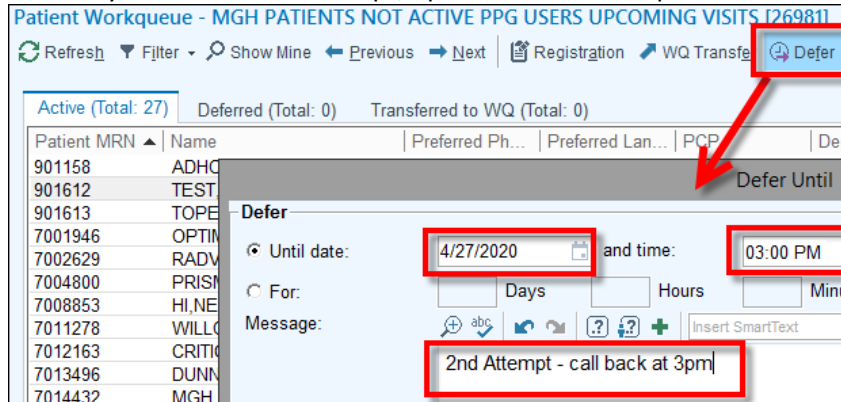
Note: Sending the PG activation code via email/text from the Registration activity removes the patient from the workqueue real-time. Sending from the Appt Desk won't remove real-time, so best practice is to go through Registration.

If patient says it’s not a good time...

1. Ask patient –

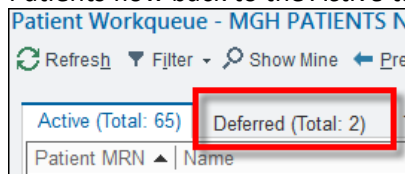
“Is there a better date/time to call you back or would you prefer I send you an activation link to enroll which will be valid for 30 days?”

2. If patient requests activation link be sent, send via email/text. If patient requests a call later, click the **Defer** button on the toolbar.
3. Enter a **Defer until** date and time of 3 days out (**T+3**).
4. Enter the number of attempts and comment (see below) for tracking and click **Accept**.
 - a. If blank, enter "1st attempt - <message>"
 - b. If already marked as 1st Attempt, update to "2nd attempt – <message>"
 - c. If already marked as 2nd Attempt, update to "3rd attempt" and see next section

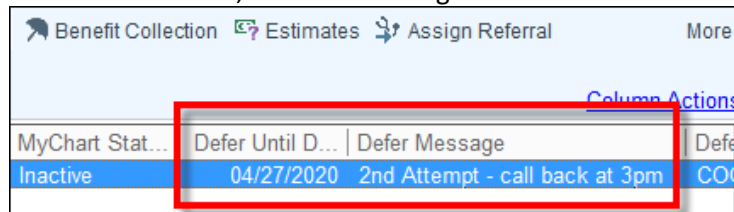


Result: Patient is moved to the *Deferred* tab.

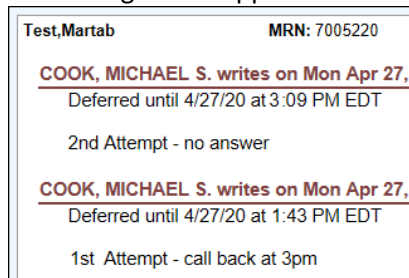
- Patients flow back to the *Active* tab when the defer date/time is reached.



- From the *Active* tab, deferred messages can be viewed via the **Defer Message** column.



- All messages also appear on the bottom half of the workqueue.



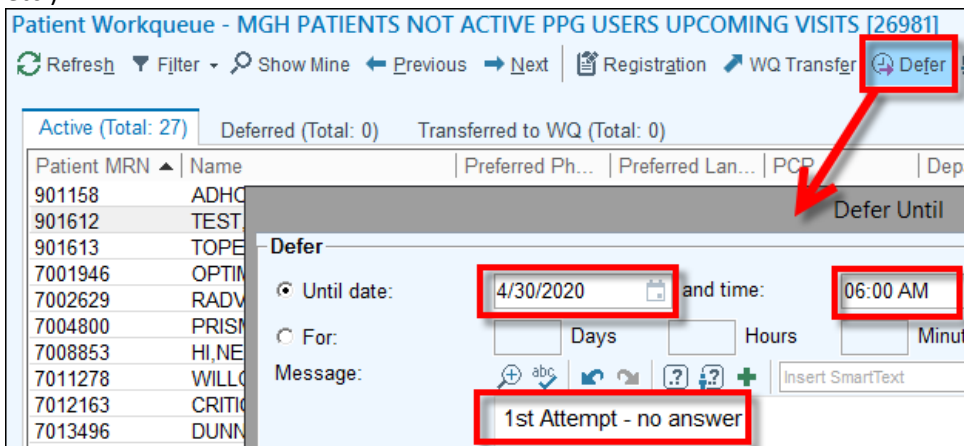
Contacting Patients (Unable to Reach)

Unable to Reach (1st and 2nd Attempt)

1. If you reach a patient's voicemail, leave a message directing the patient to go to the Patient Gateway website and enroll.

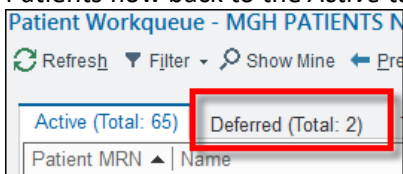
“Good <morning/afternoon>. This is <name> from Massachusetts General Hospital. I’m calling to check in with you during this difficult time and to let you know that one of the best ways to keep connected with details from your past appointments and any future appointments is to enroll in Patient Gateway. The enrollment process is easy, and you can enroll by going to patientgateway.massgeneralbrigham.org and then click the Enroll Now button. Please contact our office at <number> for any questions.”

2. After leaving a voice message or if the patient doesn’t answer the phone/is unavailable, click the **Defer** button on the toolbar.
3. Enter a **Defer until** date of “**T+3**” and a time of “**6a.**”
4. Enter a message about the call attempt (e.g., “1st Attempt - no answer,” “2nd Attempt – left voicemail,” etc.).

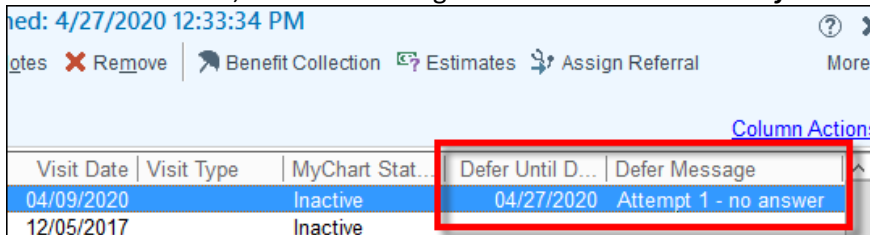


Result: Patient is moved to the *Deferred* tab.

- Patients flow back to the *Active* tab when the defer date/time is reached.



- From the *Active* tab, deferred messages can be viewed via the **Defer Message** column.



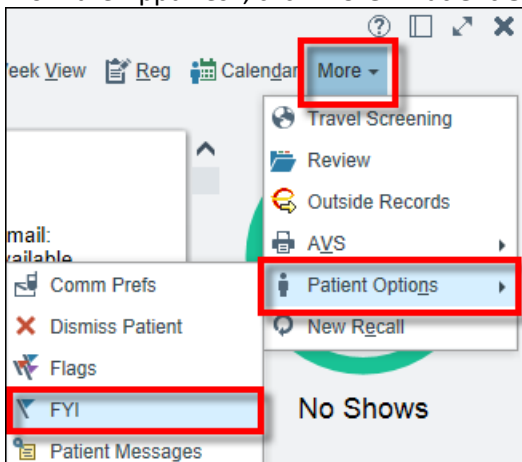
- All messages also appear on the bottom half of the workqueue.

Test, Martab	MRN: 7005220
COOK, MICHAEL S. writes on Mon Apr 27,	
Deferred until 4/27/20 at 3:09 PM EDT	
2nd Attempt - no answer	
COOK, MICHAEL S. writes on Mon Apr 27,	
Deferred until 4/27/20 at 1:43 PM EDT	
1st Attempt - call back at 3pm	

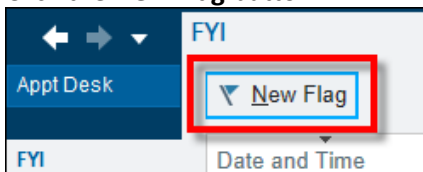
Unable to Reach (3rd Attempt)

If on the 3rd attempt you are still unable to reach the patient, you must set the “PPG Attempts Exhausted” FYI flag so the patient falls off the workqueue.

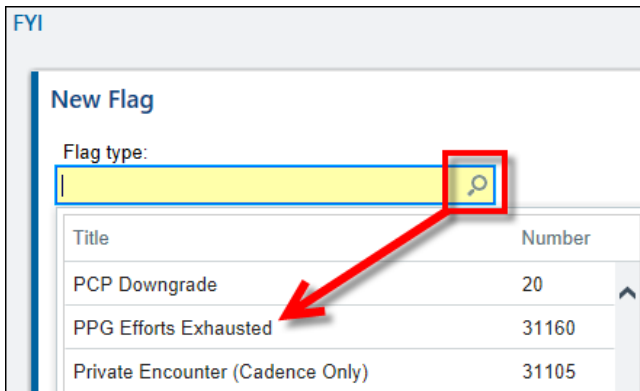
1. From the workqueue, click the **Note** button on the toolbar.
2. Enter the note – “**3rd attempt – efforts exhausted.**”
3. Click **Add**.
4. Click **Close**.
5. To set the FYI flag, from the workqueue, click **Appt Desk** on the toolbar.
6. From the Appt Desk, click **More > Patient Options > FYI**.



7. Click the **New Flag** button.



8. In the **Flag type** field, select **PPG Efforts Exhausted**.
9. Enter a note of “**Unable to reach patient.**”



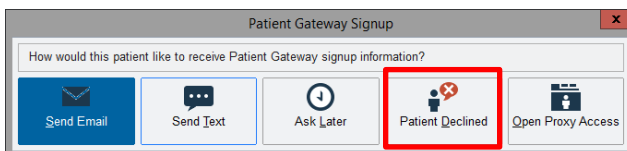
10. Click **Accept**.
11. Click the **X** to close out of the FYI activity.

Result: The patient falls off the workqueue (you may need to click 'Refresh' on the workqueue toolbar).

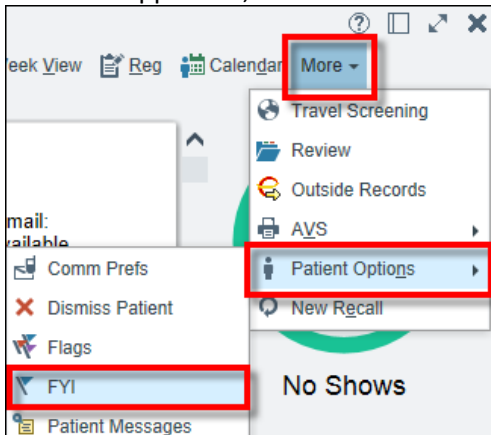
Documenting Patient Declined

When patients decline to enroll in Patient Gateway, a new Patient FYI flag must be added to remove the patient from the workqueue. To set the flag –

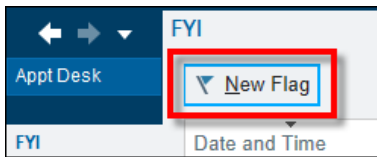
1. From the workqueue toolbar, click **Appt Desk**.
2. If the patient's PG status is not already set as "Patient Declined," click the **PG icon** in Storyboard and select **Patient Declined**.



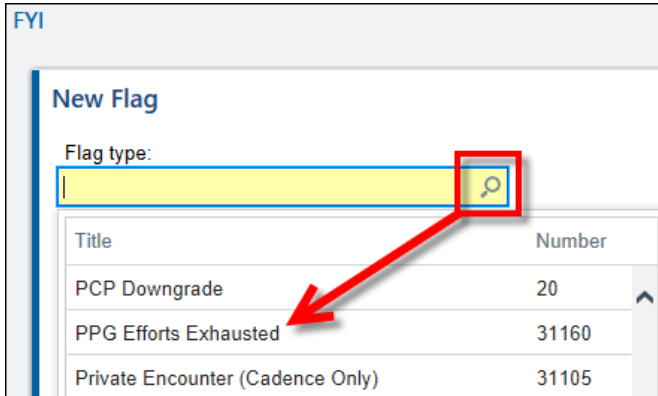
3. From the Appt Desk, click **More > Patient Options > FYI**.



4. Click the **New Flag** button.



5. In the **Flag type** field, select **PPG Efforts Exhausted**.
6. Enter a note of "**Patient Declined**" so other users know the patient declined vs. not able to reach.



7. Click **Accept**.
8. Click the **X** to close out of the FYI activity.
Result: The patient falls off the workqueue (you may need to click Refresh on the workqueue toolbar).