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	Patients with a visit scheduled in	 Patient 18 years or older
Users Upcoming Visits [26981]	the next 30 days who are	 No duplications - patient only appears
	inactive in PG	once even if scheduled for multiple appts
MGH Patients not Active PPG	Patients who had a visit in the	in same or other MGH DEPs
Users Past Visits [27024]	last 30 days and are inactive in	• PG status of blank, inactive, code expired,
	PG	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.

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Workqueue List - Patient - Filtered			
C Refresh 🛛 🗄 Open 📮 Report 📑 Export	rt 🛛 🎢	⁶ Show Al	II 🝸 New Filter 💄 My WQs 🜟 Eavs
🖾 Account 💼 Adjustment Review 📔	Char	ge Revie	ew 💼 Charge Review 🚸 Charge Router Error Pool 🚸 Charge Ro
▼ Filter	^	() Th	e list is filtered 🕺 Remove 💉 Edit
Name Contains or ID		F	ID Name
26981		★	26981 MGH PATIENTS NOT ACTIVE PPG USERS UPCOMING VISITS

- 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.

		Filter Edit
Selec	t from rules currently associated	with this workqueue (must
	Rule 235005-MGH ROUTING RULE	Rule Editor Prop
	251139-PHS ADT EXCLUDE TE	department
	399198-PHS ADT EXCLUDE DE	Favorites Properties
	399978-PHS ADT EXCLUDE PR	Searched level:1 Matche
Selec	t existing rules (must satisfy all)	Properties Directly From
1		Patient (131)
		SignOnFileGrp
		🕂 Department
		Appointment Pi
		Last Encounter
Set a	dditional filters on the entries to	Patient MRN - I
Eva	Justion logic: And	🖶 Has Preadmiss
Lvo	And And	Home Health/H
dep	partment + Add Sh	Home Health/H

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

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Se	arch for new ite	m	+ Add	Show Pa	rameter Va	lues
	1: Patient »	Depart	ment			
	Operator:	=		<u>=</u>	\diamond	

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

Value:	
Property or Rule:	, , ,
	✓ <u>A</u> ccept × <u>C</u> ancel

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

Eva	luation logic: And	Or 🧲	JSIUIII.
Sea	arch for new item	+ Add Show	Parameter Values
#	Property	Operator	Value
1	Patient » Department	=	MGH NEURO ENDO COX1 [10020010145]
2	Patient »	=	MGH REVERE BROADWAY [10020380001]

- e. Click Accept.
- 2. 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.).
- 3. **Repeat** throughout the day, as needed, depending on volume.

Contacting Patients (Able to Reach)

- 1. Review the *Preferred Phone* number and *Preferred Language* columns and contact the patient.
- 2. If not calling from the office, use <u>Doximity</u> to mask your personal phone number.
- 3. Utilize below scripting for patient enrollment:

See Standalone Virtual Visit User Guide Or"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</name></morning>	Future Visit WQ Scripting	Past Visit WQ Scripting
you get set up right now."	See <u>Standalone Virtual Visit User Guide</u> Or See <u>Epic Integrated Virtual Visit User Guide</u> (Epic Integrated departments only)	"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."</name></morning>

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(if patient is reluctant – give them the benefits)

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

Send Activation Information			
Send activation information to an email address for the person listed below.			
Christopher Strom (Patient)	chris@email.com Send		
Resending activation information will invalidate all previously sent links.			

- 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?"

Last Updated: 1/12/2021

- 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



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

켜 Benefit Collec	ction 🖙 Estimates 🈫 Assign Referral	More
	<u>Column /</u>	<u>ctions</u>
MyChart Stat	Defer Until D Defer Message	Defe
Inactive	04/27/2020 2nd Attempt - call back at 3pm	CO

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

Test,Martab	MRN: 7005220
COOK, MICHAEL S. Deferred until 4/27	writes on Mon Apr 27, 7/20 at 3:09 PM EDT
2nd Attempt - no a	answer
COOK, MICHAEL S. Deferred until 4/2	writes on Mon Apr 27, : 7/20 at 1:43 PM EDT
1st Attempt - call	back at 3pm

Patient MRN 🔺 Nar

Contacting Patients (Unable to Reach)

<u>Unable to Reach (1st and 2nd Attempt)</u>

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

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"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 <u>patientgateway.massgeneralbrigham.org</u> 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.
 Patient Workqueue - MGH PATIENTS N



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

red: 4/27/2020 12:33:	34 PM		? X
<u>o</u> tes 🗙 Re <u>m</u> ove 🛛 🮘 B	enefit Collection 🖾 E	stimates 🍄 Assign Referral	More
		Column	Actions
Visit Date Visit Type	MyChart Stat	Defer Until D Defer Message	<u>^</u>
04/09/2020	Inactive	04/27/2020 Attempt 1 - no ansv	ver
12/05/2017	Inactive		

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

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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."

FYI	
New Flag	
Flag type: 	2
Title	Number
PCP Downgrade	20 🔨
PPG Efforts Exhausted	31160
Private Encounter (Cadence Only)	31105

10. Click Accept.

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.

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- 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.

FYI					
	Ν	New Flag			
		Flag type:	Q		
		Title	-	Number	
		PCP Downgrade		20	~
		PPG Efforts Exhausted		31160	
		Private Encounter (Cadence Only)		31105	

- 7. Click Accept.
- 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).