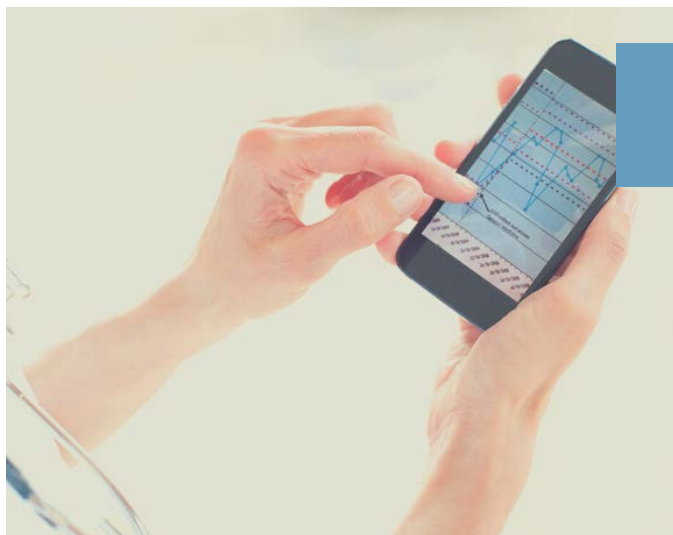


ELECTRONIC PATIENT ENGAGEMENT INVENTORY

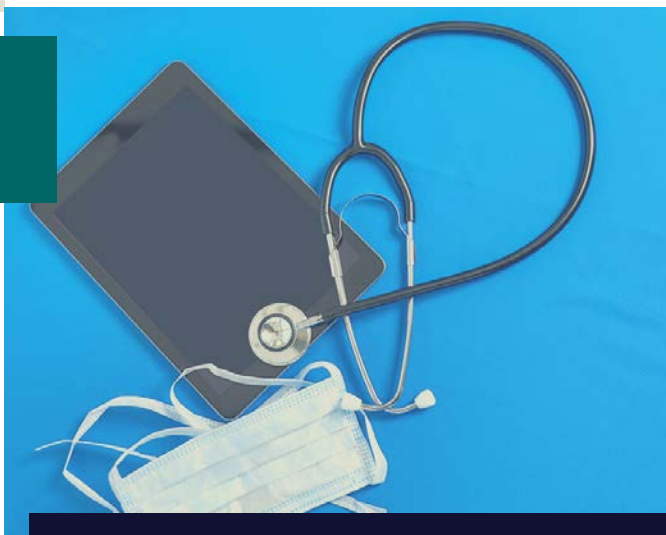


WHY THIS INITIATIVE?

The current HRSA Health Center Controlled Network grant includes a goal to expand use of new electronic tools that promote patients' engagement in their care. To support health centers and HCCNs in achieving this goal, HITEQ formed a Change Agent Team of representatives from more than ten diverse HCCNs to develop resources relating to electronic patient engagement (EPE). At the same time, health centers are rapidly adopting patient engagement tools to reach patients at home.

HOW WAS THIS INFORMATION GATHERED?

HITEQ and its Change Agent Team (the Team) were interested in gathering information on a broad range of EPE Tools, including those that enable: bidirectional messaging, patient surveys, education, patient outreach, electronic self-scheduling & self-registration, and more. In the spring of 2020, the Team developed a survey to gather detailed information on health center experiences with a variety of EPE tools and included questions about product functions, strengths & weaknesses, cost, integration with EHRs, ease of implementation, and quality of vendor support. The perspectives of health centers would add valuable information to that which is available through third party reviews, vendor websites, and demos. Members of the Team were asked to submit the survey based on their own experiences or through interviews with their health centers. Information on 8 tools was gathered in this way. An additional 4 interviews were conducted with health center contacts outside the Team. HITEQ also gathered third party ratings from Capterra, a public review site for business software including EMRs, patient engagement, and patient portal tools. Lastly, HITEQ gathered additional information from demos/conversations with six vendors. Information from these vendors is included in the profiles, and labeled as provided by the vendor. Two vendors were contacted and did not respond. Patient portal vendors were not contacted, as these products are specific to the particular EHRs.



The final inventory, found on subsequent pages, is a set of one page summaries of each product reviewed.

HITEQ would like to continue to build this inventory. If you are interested in sharing your experience with these or other EPE tools, please contact us at HITEQinfo@jsi.com



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PATIENT ENGAGEMENT

CareMessage



Patient communication | www.caremessage.org

CareMessage is a texting/messaging platform specifically for safety net organizations that supports messaging to tailored segments of patients. Our FQHC reviewers found it useful for patient outreach including mass messaging to promote preventive screenings, broadcast the availability of new services, and send weekly educational messages to patients with specific chronic conditions (e.g. diabetes).

Information from Vendor:

- EHR integration is strongest for appointment reminders.
- Educational campaigns can target specific groups - most customers use Azara DRVS, i2i, or Relevant Pop Health systems to create groups.
- Education/health coaching programs allow some personalization based on "branching" logic in program. There are 19 of these programs.
- Content is based on clinically validated approaches, motivational interviewing, & 6th-grade reading level.
- Additional languages can be included if the health center provides the translations; machine translation is deemed too risky.
- CareMessage LITE: free for up to 60 days during COVID-19 - offers outreach & texting; no EHR integration.
- Includes a tool to facilitate patient referrals
- CareMessage is not a telehealth platform, but offers tutorial videos.

	Information provided by FQHCs	Information provided by vendor	No information given
Functionality 	• Patient Reminders • Medication refills • Health education • Patient-generated data	• Patient Surveys • Care gap outreach	• FAQs • Billing + payment • Patient self registration • Patient Health Info • Appt. scheduling • Secure messaging • Care plan compliance • Patient monitoring • Telehealth

Integration



- Azara DRVS Population Health
- GE Centricity
- i2i Population Health
- Relevant Population Health
- Other EHRs, for appointment reminders: Greenway, Athena, Epic, NextGen, eCW

DETAILS AS OF JULY 2020

COST:

Annual subscription based on total patient population; implementation: 10% of subscription.

RATINGS:

CAPTERRA



www.capterra.com/p/194357/CareMessage/#reviews

STRENGTHS:

- Educational campaigns text patients 1-2x per week with diagnosis-related tips
- Mass messaging
- Analytics on product use & patient responses

WEAKNESSES:

- SMS messaging not HIPAA-compliant without specific consent
- Follow-up to patient responses largely manual (e.g. creating call lists)
- Limited 2-way communication
- English & Spanish only

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.



Westat

PATIENT ENGAGEMENT

Relatient



Patient communication | www2.relatient.net

Relatient is a texting/messaging platform. Our FQHC reviewers found it useful for mass messaging to patients, board members and employees. The messages are easily customizable by health center staff. Confirmations in response to appointment reminders are integrated into the EHR.

Information from Vendor:

- Includes 34 pre-built Health Campaigns to engage patients in preventive care. (Integration for patient detail from EHR is done via SFTP or HL7.)
- For patient, no password required.
- Offers 2-way chat (HIPAA-compliant).
- For e-registration, the company will digitize a health center's existing forms.
- Appointment alert comes with a link to add to patient calendar.
- Scheduling function has automated wait list.
- No-Show re-engagement is available via text.
- Additional languages are available via translator tool.

Pricing examples: \$100 - \$125/provider/month reminders, scheduling or e-registration; \$19-\$29/provider/month for mass messaging, surveys or secure messaging. Bundling discounts available.

DETAILS AS OF JULY 2020

COST:

Per provider pricing varies by functionality. Savings through bundling. Example from 1 FQHC: \$3,550/mo unlimited text, email, voicemail for 90 providers; +750/mo to include prospective patients

RATINGS:

CAPTERRA



www.capterra.com/p/183345/Relatient/reviews/

KLAS #1 in Patient Outreach

STRENGTHS:

- Very easy to use, customize messages
- Company very responsive
- ROI: 1,000s of messages can be sent within minutes, saving staff time spent on outreach

WEAKNESSES:

- English & Spanish only
- Does not integrate fully for cancelled appointments

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.

	Information provided by FQHC(s)	Information provided by vendor	No information given
Functionality 	• Patient Reminders • Appt. scheduling • Secure messaging • Health education	• Patient Surveys • Care gap outreach • Billing + payment • Administrative Reporting • Patient self registration	• FAQs • Patient-generated data • Care plan compliance • Patient monitoring • Telehealth • Lab and test results • Medication refills

Integration 	• Greenway Health (appointment confirmation) - cost included in small set-up fee	• Epic • GE Centricity • NextGen • eClinicalWorks • Athena • Allscripts • Dentrux • 80 other EHRs (a degree of integration varies)
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PATIENT ENGAGEMENT

Care Thread



Patient communication | www.carethread.com

Care Thread is a texting/messaging platform originally designed to support care team communications. A custom-branded interface for patients is in development and will provide the ability to complete depression screenings, receive appointment reminders, request appointments and refills. The product also has embedded secure video chat for telemedicine, and the ability to securely transmit a high-resolution image. Because there are advanced logic escalation rules, and unique quick texts for common usage, any message can be directed to the best recipient (e.g. a message requesting an appointment might go to the call center for average risk patients, but right to their nurse if they are high risk).

Care Thread supports multiple interface types - HL7, WTCP, etc. Each data feed has a cost to start, and a nominal annual cost.

Information from vendor:

No response.

	Information provided by FQHC(s)	No information given
Functionality 	• Patient Reminders • Patient health info • Medication refills • Appt scheduling • Secure messaging • Health education • Care plan compliance	• FAQs: • Patient Surveys • Care gap outreach: • Patient-generated data: • Telehealth

Integration



- Greenway Health - cost associated with each data feed from provider IT systems
- Cerner

DETAILS AS OF JULY 2020

COST:

Example from 1 FQHC:

Initial install: \$18,000

\$6/mo/Provider

\$.10 - \$.50/mo/Patient

RATINGS:

CAPTERRA: Not rated

STRENGTHS:

- Functionality includes both provider-provider and health center-patient communications
- HIPPA-compliant messaging
- Very responsive company
- Low maintenance product
- High reliability
- Highly scalable

WEAKNESSES:

- Lack of multilingual options

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.



PATIENT ENGAGEMENT

Updox



Patient communication | www.updox.com

Updox is a texting/messaging platform. In addition to the functionalities listed below, it can send, receive and manage e-faxes. The product was found to work best with tech-savvy patients and those who will use the online and phone features, including telehealth.

Information from Vendor:

- There are 3 ways to integrate Updox with the EHR:
 - Direct: Full integration of schedule & patient info
 - Indirect Partners: Updox is part of the EHR (white label)
 - Stand-alone: Practice can upload files to Updox
- Secure messaging is available via web link sent by text

	Information provided by FQHCs	Information provided by vendor	No information given
Functionality 	• Patient Reminders • Medication refills • Appt scheduling • Secure messaging • Telehealth • Patient portal	• Administrative reporting • Billing + payment	• FAQ • Lab and test results • Health education • Care plan compliance • Patient surveys • Patient self registration • Care gap outreach • Patient monitoring • Patient-generated data

Integration



- eClinicalWorks
- NextGen
- Greenway Health
- AthenaHealth
- eMD
- Allscripts
- Partner with 150+EHRs

DETAILS AS OF JULY 2020

COST:

Example from 1 FQHC:

\$2,800/MO complete package (special promotion), no Cost for an EHR that is already integrated

RATINGS:

CAPTERRA:



<https://www.capterra.com/p/147554/Updox/reviews/>

STRENGTHS:

- Mass messaging

WEAKNESSES:

- Integration not as flexible as desired; required workflow changes
- Lack of multi-lingual options; an interpreter has to load messages in Spanish
- Start-up & training issues; Manual provided but other support is lacking.

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.



PATIENT ENGAGEMENT

Phreesia



Patient Intake Tool | www.phreesia.com

Phreesia is a patient intake tool that integrates to the EHR and offers self-registration, patient surveys, and screenings (PHQ-9, SBIRT, etc.) for primary care and a variety of specialties, including pediatrics and OB. Programmed forms or screening tools can be completed prior to the visit in several ways (e.g., email, iPads, etc.)

Information provided by vendor:

No response.

DETAILS AS OF JULY 2020

COST:

Example from 1 FQHC:
One-Time up-front cost + Monthly Per provider (\$50-\$75) and per tablet (\$60) cost; No additional cost for an EHR that is already integrated.

RATINGS:

Capterra:



www.capterra.com/p/131633/Phreesia/reviews/
2020 Best in KLAS for Patient Intake Management

STRENGTHS:

- Demographic information is fully integrated to EHR
- Analytics on product use

WEAKNESSES:

- Information other than demographics becomes a PDF that requires manual entry to the EHR

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.

Information provided by FQHCs

Information provided by vendor

No information given

Functionality



- Patient Surveys
- Patient self registration

- Appt scheduling
- Health education
- Billing + payment
- Care gap outreach

- FAQ
- Patient Reminders
- Lab and test results
- Medication refills
- Secure messaging
- Care plan compliance
- Patient monitoring
- Patient-generated data
- Telehealth

Integration



- eClinicalWorks
- NextGen
- Greenway Health
- AthenaHealth
- eMD
- Allscripts



PATIENT ENGAGEMENT

Healow - eClinicalWorks



Patient portal | www.eclinicalworks.com/products-services/patient-engagement/

Healow is a mobile and web-based patient portal built for the eClinicalWorks EHR. Healow integrates telehealth and messaging as well as registration kiosks and pre-visit forms or screenings. Patients can also request medication refills, appointments and more using the Healow portal. Our FQHC reviewer wishes the portal was more robust, allowing the patient to do more. Additionally, as 50% of the FQHC's patients speak a language other than English or Spanish, it is less useful than it could be.

Information was not requested from vendors for EHR portals.

DETAILS AS OF JULY 2020

COST:

Based on number of Licenses

RATINGS:

CAPTERRA: Not rated

STRENGTHS:

- EHR integration, unified system

WEAKNESSES:

- English & Spanish only
- Can't load historical data that predates patient's registration in portal
- Training documentation
- Requires patient email address

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.

	Information provided by FQHCs	Information provided by vendor	No information given
Functionality 	• Patient Reminders • Patient health info • Medication refills • Appt scheduling • Secure messaging • Health education • Telehealth	• Patient monitoring • Patient-generated data	• FAQ • Care plan compliance • Patient Surveys • Patient self registration • Care gap outreach

Integration

- eClinicalWorks



PATIENT ENGAGEMENT

SolutionReach



Patient communication | www.solutionreach.com

SolutionReach is a web-based text/message/voice platform. In addition to the functionality listed below, it can produce newsletters. Our FQHC user did not find success with the product and switched to another tool shortly after initial adoption.

Information from Vendor:

- 2-way texting includes a HIPAA consent tool.
- e-Registration is fully encrypted.
- Demographic registration data is written back to EHR.
- Pre-built patient groups are available for blast messaging.
- Practice can create groups.
- Integration to VoIP & PM systems identifies patient callers & provides relevant information.
- Refer-a-Friend facilitates patient referrals.
- Automated recall is available for patients due for visit (based on EHR recall flag).

DETAILS AS OF JULY 2020

COST:

Flat Fee per site & license per provider
Example from 1 FQHC with 5 sites and 16,000 patients: \$32,000/yr license & support

RATINGS:

CAPTERRA:



<https://www.capterra.com/p/160916/Solutionreach/reviews/>

KLAS #2 in Patient Outreach

STRENGTHS:

- No feedback provided

WEAKNESSES:

- Poor vendor responsiveness
- Training limited to online videos

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.

Information provided by FQHCs

Information provided by vendor

No Information Given

Functionality



- Patient Reminders
- Secure messaging
- Patient Surveys
- Care gap outreach
- Health education

- Appt scheduling
- Billing + payment
- Patient self registration:

- FAQ
- Lab and test results
- Medication refills
- Patient monitoring
- Patient-generated data
- Telehealth
- Care plan compliance

Integration



- NextGen
- Epic
- GE Centricity
- Athena
- Allscripts
- Greenway



PATIENT ENGAGEMENT

Otech



Patient Intake tool | www.otechgroupllc.com

Otech is a mobile and web-based app that facilitates patient e-registration before or upon arrival at the health center through products named Ustart & Uarrive, respectively. It's Usign product allows a patient to complete forms & record consent. Our FQHC user is new to the product and preferred not to list strengths & weaknesses.

Information from the vendor:

- The software integrates to provider's scheduling system & can do anything generally done at the front desk, i.e. obtain demographic data, patient photo, insurance verification, address & email look-up, telehealth check-ins, appointment cancellations.
- Under a direct integration (available at no additional cost with 4 EHRs - see below), bidirectional read-write capability allows system to request only data that is missing and tailor check-in based on type of appointment, timing of last visit, demographics.
- PRAPARE template can be included to capture social determinants.

*Information
provided by FQHCs*

*Information
provided by vendor*

*No information
given*

Functionality



- Patient Reminders
- Patient self registration

- Billing + payment

- Lab and test results:
- Medication refills
- Appt scheduling
- Secure messaging
- Health education
- Care plan compliance
- FAQs
- Patient Surveys
- Care gap outreach
- Patient monitoring
- Patient-generated data
- Telehealth

DETAILS AS OF JULY 2020

COST:

Ustart is per provider
Uarrive is per device (kiosks & tablets)
Usign is generally bundled into the other products, but can be purchased separately

Example pricing from 1 FQHC:

Ustart: \$2,900/month

Uarrive & Usign: \$1,250/month

Costs include implementation & maintenance.

RATINGS:

CAPTERRA: Not Rated

STRENGTHS:

- No feedback provided

WEAKNESSES:

- No feedback provided

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.

Integration



- i2i Population Health: for recall & marketing plans & preventive care outreach
- NextGen
- Athena
- Allscripts
- Greenway Health



PATIENT ENGAGEMENT

athenaOne athenaCommunicator Portal



Patient portal | www.athenahealth.com/AthenaOne

athenaOne athenaCommunicator Portal is the a patient portal for Athenahealth EHR which allows practices to send lab and test results, as well as messages. Patients can schedule appointments, access their history, and more through the portal. Our FQHC reviewer to send mass messages for care reminders in the month due. They have also had success with outgoing texts. The health center would prefer that the appointments function work without requiring the patient to log-in. The health center also noted that it would be helpful if publication of lab results to the portal was a default, not requiring provider action.

Information was not requested from vendors for EHR portals.

*Information
provided by FQHCs*

*Information
provided by vendor*

*No information
given*

Functionality



- Patient Reminders
- Lab and test results
- Appt scheduling
- Secure messaging
- Health education
- Care gap outreach

- Medication refills
- Care plan compliance
- FAQs
- Billing + payment
- Patient Surveys
- Patient self registration
- Patient monitoring
- Patient-generated data
- Telehealth

Integration



- Athena EHR

DETAILS AS OF JULY 2020

COST:

Included with EHR

RATINGS:

CAPTERRA:



<https://www.capterra.com/p/203065/athenaOne/reviews>

STRENGTHS:

- Good utilization reporting

WEAKNESSES:

- Difficult for patients: log-in required for most functions
- No 2-way communication
- English & Spanish only

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.



PATIENT ENGAGEMENT

Luma Health



Patient communication | www.lumahealth.io

Luma Health is a web-based texting/messaging platform. It asks common questions by text and can be used to support scheduling & registration. Through EHR integration it enables real-time self-scheduling, showing available slots and allowing bi-directional communication. Under the automated wait list, if patients' preferred slots are not available Luma can send a broadcast message to everyone on the waiting list if the slot becomes available or offer it to patients one at a time, in wait list order, allowing each patient 15 minutes to respond before messaging the next patient on the list. The software can upload cohorts created by Azara DRVS Population Health system.

Information from vendor:

- Bidirectional interfaces available for 7 EHRs.
- The product supports 20 languages.
- Luma enables patient reviews & referrals.
- Broadcast messaging is available.
- Secure links are embedded in SMS text messaging to handle PHI.
- System can send patient education based on ICD & CPT codes.

DETAILS AS OF JULY 2020

COST:

Example from 1 FQHC:
\$170/FTE provider/mo; \$219 if include telehealth.
\$10,000 for implementation, integration, & training.

RATINGS:

CAPTERRA: ★★★★★
<https://www.capterra.com/p/176533/lumahealth/reviews>

STRENGTHS:

- Real-time self-scheduling
- Automated wait list
- Over 70 languages

WEAKNESSES:

- No feedback provided

Costs, strengths, and weaknesses included here are based on interviews with health center users. Please do your own due diligence to confirm costs and functionality for your purposes.

Functionality



- | Information provided by FQHCs | Information provided by vendor | No information given |
|---|--------------------------------|---|
| <ul style="list-style-type: none"> • Patient Reminders • Appt scheduling • Secure messaging • Care plan compliance • Patient Surveys • Patient self registration • Care gap outreach • Telehealth | | <ul style="list-style-type: none"> • Lab and test results • Medication refills • Health education • Patient monitoring • Patient-generated data • FAQs • Billing + payment |

Integration



- | | |
|--|---|
| <ul style="list-style-type: none"> • Athena Health • eClinical Works • Epic • Allscripts • Azara DRVS Population Health | <ul style="list-style-type: none"> • Greenway Health • NextGen • GE Centricity |
|--|---|

