Peer to Peer Sharing Webinar #2
Wednesday, July 22, 2020, 1:30 PM ET

Using Patient Portals and Medical Health Records as a Tool for Arthritis and Lupus Self-Management Practices

Webinar Notes and Resources

Call Summary Themes:

- Heather Kitzman, PhD., Director of Research, Baylor Scott and White Health and Wellness Center, Dallas, TX – Health System perspective
  - Integrating a referral platform for Walk With Ease into the health system electronic health record (Epic) through both EpicCare Link and Care Everywhere.
  - Heather provided an overview of the WWE NACDD hub project and the need for integrating WWE referrals into the health systems Epic health record.
  - Working to integrate referral platform for WWE into Epic platform for internal referral. CareLink will be used for WWE referral outside of the health system.
  - Work over the next six months will set up the internal referral process within Epic. This integration into Epic will help sustain arthritis/WWE referral efforts.
- Heather Hodge, M.Ed., Senior Director for Community Health, YMCA of the USA – Community Based Organization perspective
  - Demonstration project with healthcare system to order physical therapy. They are collecting data through REDCap and using electronical medical record for referral.
  - Work in this area began about 5 years ago using technology to track program outcomes; part of the work included a partnership with Sound Generations.
  - Originally proposed using an EHR as the solution to help with referral; tried this throughout the federated network of 501c3 orgs (YMCAs). Interoperability was a challenge from the beginning.
  - After a couple of years and evaluation of the process, the team looked into fast healthcare interoperability resources (FHIR) - standards describing data formats and elements (known as "resources") and an application programming interface (API) for exchanging electronic health records (EHR).
  - The YMCA decided to see if they could use a simpler data system but still facilitate the referral of patients/individuals to community-based entities.
  - Y-USA provided guidance on FHIR standards specific to arthritis and demonstrated that they could facilitate from EMR through FHIR standards to REDCap (a secure web application for building and managing online surveys and database).
  - The team is in the process of beginning a pilot with a few Ys who use Epic.

- Adam Burch, DC, MPH, Chronic Disease Pain Management Coordinator, New Hampshire Department of Health – State Health Department perspective
  - Partnering with network of Federally Qualified Health Centers to edit the electronic health record system (Centricity EMR).
  - Tracking physical activity for patients through the Exercise Is Medicine Physical Activity Vital Sign tool.

- SHD worked to understand the barriers that clinicians face in referring patients to evidence-based interventions. The top three barriers they uncovered were time, money, and technology.
- Potential solutions for these barriers include:
    - Exercise is Medicine Physical Activity Vital Sign (PAVS) integration
    - Bi-directional referral through Unite US platform
    - Billing, coding, and documentation

Key Takeaways:

- Leverage partners: Consider opportunities for cross-sector collaboration and alliances of individuals and organizations as a way of tapping into diverse perspectives and resources to achieve a shared goal.
- Understand barriers and facilitators: Identify the facilitators and barriers to using patient portals and electronic health records to triage patients to evidence-based self-management resources.
- Utilize a systems approach: Aim for developing a process or a protocol where the healthcare system identifies patients who have a chronic disease, or who are at risk for chronic disease, and triages and counsels that patient to local evidence-based interventions.
- Think big, start small, and scale up: Look for opportunities to expand a pilot or small-scale project to reach more people and/or broaden the effectiveness of the approach.

Post Webinar Question and Answer with the Panelists:
1. How has COVID-19 altered your approach to using electronic health records to facilitate referrals to exercise or other self-management strategies?
    a. Heather Kitzman: All our programs have moved to virtual for now. We are calling individuals in our patient database to recruit to WWE as providers are very busy handling COVID related issues.
    b. Heather Hodge: At this time COVID-19's main impact has been on the healthcare system partners. They have been detailed to COVID-19 efforts which has slowed down our timelines for project implementation.
    c. Adam Burch: The OA patient population is particularly susceptible to worse COVID-19 infections. NH has placed a heavier emphasis on solutions that work for telehealth visits as well as in person visits including helping CHAN locate additional sources of funds to overhaul its patient portals.
2. If you could share one piece of actionable advice for our grantees what would that be?
    a. Heather Kitzman: Look for scalable approaches that work with your healthcare system or clinical partner - make sure it's a light lift for providers who are already busy with many other tasks. Further, explore use of MA and community health workers as potential referral mechanisms.
    b. Heather Hodge: Talk to your partners. There is no one size fits all for referrals and the feedback loop between healthcare partners and Ys. You can start at whatever level both organizations are comfortable – test and build from there.
    c. Adam Burch: Talk to full time practicing healthcare providers in non-research clinical settings about what they need to screen, counsel, and refer for physical activity in everyday practice before you ask them to do it. If they aren't highlighting the main barriers for you, you're probably missing something important.

Resources:

- [REDCap](#)
- Older Americans Act Title III-D [Funding](#)
- NACDD Arthritis [Resource Page](#)
  - Links to Community Clinical Linkages Webinar Series
    - Recordings
    - Presentations and related documents
  - Links to other tools and resources
    - Leveraging Partnerships to Develop a Sustainable Approach to Increasing Adoption of Arthritis Appropriate Evidence-Based Interventions with Employers
    - Walk With Ease worksite flyers
    - Sample WWE provider referral talking points
- Healthcare Provider Toolkit and Related Communications – [DRAFT](#)
- [Unite US](#)
- Exercise is Medicine
  - [Physical Activity Vital Sign Tool](#)
  - [RX for Heath Series](#)