HIPAA Security and Text Notifications

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Carolinas IT
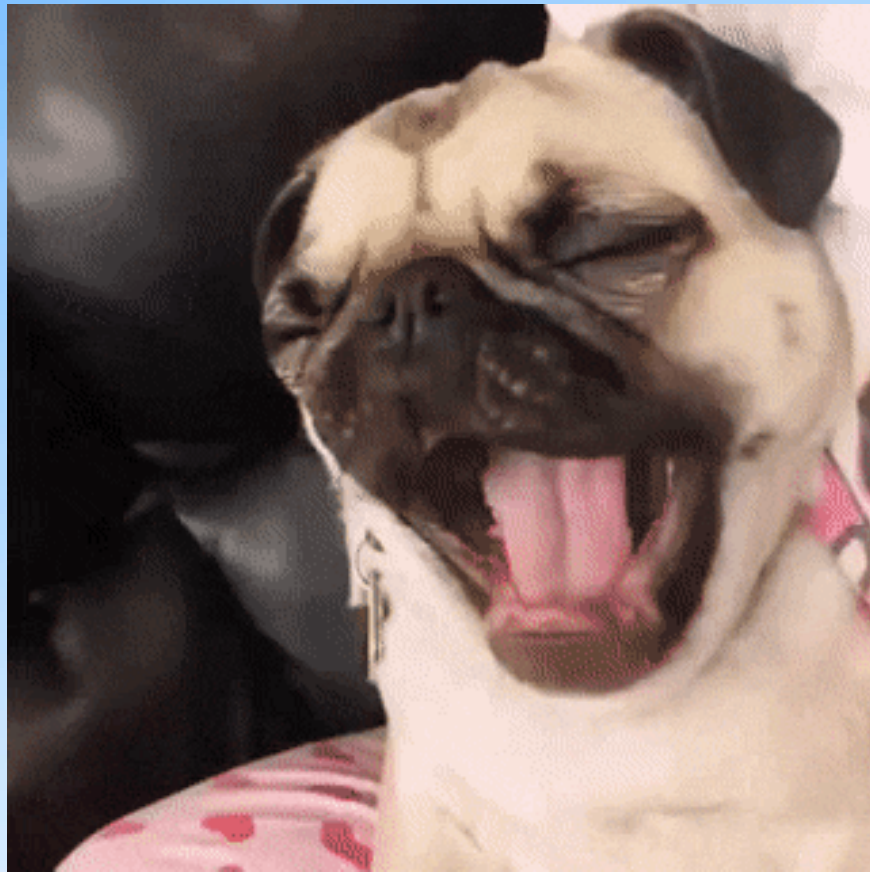Experience Peace of Mind

CureMD UC'19
Raleigh, North Carolina

Today's Plan

- Critical Assumptions

- Recommended Controls for Text Notifications

- Overview of Applicable CureMD Screens

- Policy Template

Restricting Functionality

Good!

Bad!

CureMD
Practice without boundaries

CureMD UC'19
Raleigh, North Carolina

Controlling the Service

Note: Setup Requires Unique Superuser with Role Access to Practice Settings

- Enable for All Patients

- Edit the Notification Messages (stay generic)

- Activated/Deactivated by Individual Patient

    - Ensure there is a valid number!

    - Ensure there is a protocol for Opt Out…

    Warning! This is a manual process, regardless of the portal

Controlling the Service

- Preferences Event Log

- Administration +TM Status Log

- Data Retention Specifications Aligned Patient Record

- CureMD has a BAA with the Text Service Provider

Tuesday, September 17, 2019 3:13 PM

Inbox Task [4] Today's Patients [2] Lab [72] Billing Problem list [10]

Settings – Device Integration

| Device Integration | Resource Setups |

Messaging Online

💾 Save

- Practice
  - My Practice
  - My Practice Settings
    - Audit Trail
    - Billing
    - CureBilling
    - Clean Claim Checks
    - CureConfirm
    - Custom Apps
    - **Device Integration**
    - EDI
    - EHR
    - Reports
    - Scheduler
    - Security
    - Inventory
    - CCM
  - Appointment Reason
  - Appt Reason Group
  - Global Block Schedule
  - Quality Programs
  - eSuperBill
  - Reminders & Confirmations
  - Appointment Chains
  - Bank
  - Agency
  - Reference Data
  - Financial Aging
  - Provider
  - Provider Groups
  - Provider Taxonomy Codes
  - Outsource Location
  - Recall Reason
  - Resource
  - Smart Phrases
  - Title
  - Transport
  - Void Appointments

IQmark Reports

- ☐ Digital ECG
- ☐ Digital Spirometer

Check-In App

- ☑ Check-In App

Online Payment

Gateway

[TransEngen ▼]

☐ **Genesis Digital Imaging**

Path * [   ] Browse

User * [   ]

Server * [   ]

Welch Allyn

- ☐ Spot Vital Signs Design
- ☐ Cardio Perfect

LDX Machine

- ☐ LDX Machine

Information Transmission

- ☑ Email
- ☑ Fax   [InterFax ▼]

Drug Database Update

Date *
9/11/2019 5:47:06 AM

Validity Period
2 years

Text Message (TM) Alerts, Notification and Reminders

☑ Enable SMS Alerts   ☑ Send SMS from Scheduler   **Enable Alerts For All Patients**   Disable Alerts For All Patients

☑ Scheduled Appointment

2 days before

Dear «Patient First Name»,
You have an appointment with with Dr.«Appointment Provider First Name» «Appointment Provider Last Name» on «Appointment Date and Time».
Please call «Current Practice Phone» to confirm/change

☑ Confirmed Appointment

2 days before

Dear «Patient First Name»,
Your appointment is confirmed with Dr.«Appointment Provider First Name» «Appointment Provider Last Name» on «Appointment Date and Time».
To reschedule, please call «Current Practice Phone»

☑ Follow Up Visit Alerts

2 days before

Dear «Patient First Name»,
Your Follow up visit is due on «Follow Up Visit Date» with Dr.«Patient Provider First Name» «Patient Provider Last Name»
Please call us at «Current Practice Phone» to schedule

☑ Administrative Alerts

2 days before

Dear «Patient First Name»,
«Admin Alerts Subject» is due on «Admin Alerts Date». Please call us back regarding your follow-up visit.
You may receive a call from «Current Practice Name». We look forward to hearing from you

☑ Clinical Reminders

2 days before

Dear «Patient First Name»,
Your «Clinical Reminders Subject» is due on «Clinical Reminders Date» with Dr.«Patient Provider First Name» «Patient Provider Last Name»
Please call «Current Practice Phone» to schedule

☑ Lab Result Notifications

Dear «Patient First Name»,
Your labs have been received by Dr.«Patient Provider First Name» «Patient Provider Last Name».
Please visit «Current Practice Name» for details

☑ Birthday Greetings

Dear «Patient First Name»,
Dr.«Patient Provider First Name» «Patient Provider Last Name» wishes you very happy birthday.Have a great day.
«Current Practice Name»

☑ Patient Search Report

Dear «Patient First Name» «Patient Last Name»

Add/Edit Text Message   ✕

💾 Save

Dear «Patient First Name»,
Your labs have been received by Dr.«Patient Provider First Name» «Patient Provider Last Name».
Please visit «Current Practice Name» for details.

Appointment
Claim Denial
Current Location
Current Note
Current Practice
Current User
Family
Immunization
Last Visit
Medication
Next Appointment
Oncology
Other
Patient
Patient Insurance
Patient Resp. Party
Portal User
VitalSigns

Fields

--Select-- ▼   Add to Text

Appointment Provider Last

Appointment Provider Last

er First Name» «Patient

egarding your follow-up visit.
earing from you

Dr.«Patient Provider First

Provider Last Name».

very happy birthday.Have a

Clinical Summaries via: ◯ Print ◯ Fax ⦿ Email ◯ Patient Portal ◯ None

Patient Profile

Special Population

Agriculture Worker ☐ Migrant ☐ Seasonal   ☐ School Based Health Center Patient ☐ Veteran

Residence

☐ Homeless   Type --Select--   ⌄   ☐ Public Housing   ☐ Nursing Home   ☐ Jail   ☐ Prison

Pharmacy ➕	Address	Phone	Fax	SureScripts	Default	
Walgreens Drug Store 07548	2624 SUNSET AVE, ROCKY MOUNT NC - 27804-3747	(252) 937-4999	(252) 937-8396	NewRx, Refill	☐	🗑
CVS/pharmacy #3831	102 N. BICKETT BLVD, LOUISBURG NC - 27549	(919) 496-6111	(919) 497-0540	NewRx, Refill, Cancel	☐	🗑

Reports

☐ Discontinue Statement Confidenital Patient ⌄ ➕   Deliver Statement to Patient-Current Address ⌄

☐ Exempt from reporting ☐ Medical Home   ☐ Dental Home

☐ Exempt from HIS batch reports

		Preferred Method	
Alerts	Text	Email	Phone
☑ All	☑	☑	☐
☑ Scheduled Appointment	☑	☑	☐
☑ Confirmed Appointment	☑	☑	☐
☑ Follow Up Visit Alerts	☑	☑	☑
☑ Administrative Alerts	☑	☑	
☑ Clinical Reminders	☑	☑	☑
☑ Lab Result Notifications	☑	☑	☑
☑ Birthday Greetings	☑	☑	☑

Tuesday, September 17, 2019 3:24 PM

Inbox   Task **4**   Today's Patients **2**   Lab **72**   Billing Problem list **10**

Theresa Test LEP 🚩	Home (919) 609-2598
38Y 8M Female	
DOB 1/1/1981	
Account 133	
blake.wright@curemd.com	

2.06	24.95
BSA	BMI
184 lbs	6'
Weight	Height

Allergy
Sulfa Antibiotics

Insurance $ 498.5

	Balance	Unapplied
Patient	$167.9	$60
Family	$167.9	$60

Notes ⊕

Patient - Profile

Demographics | Insurance | Contacts | Consents | Disclosures | Preferences | Restrictions | **Preferences Event Log**

🟢 Messaging   Online

⊞ **Registration**
⊞ **Provider Notes**
⊞ **G0 Services**
⊞ **Clinical**
  Messages
⊞ **Interoperability**
  Documents
⊞ **Appointment**
⊞ **Billing**

◢ 9/17/2019 3:24:27 PM   Modified by Corey, Theresa

|	
Scheduled Appointment Alerts Preferred Method:	
Confirmed Appointment Alerts Preferred Method:	
Follow Up Visit Alerts:	Yes
Follow Up Visit Alerts Preferred Method:	Text and Email
Administrative Alerts:	Yes
Administrative Alerts Preferred Method:	Text and Email
Clinical Reminders:	Yes
Clinical Reminders Preferred Method:	Text and Email
Lab Result Notifications:	Yes
Lab Result Notifications Preferred Method:	Text and Email
Birthday Greetings Alerts:	Yes
Birthday Greetings Alerts Preferred Method:	Text and Email

▷ 9/4/2019 10:49:20 AM   Modified by Corey, Theresa
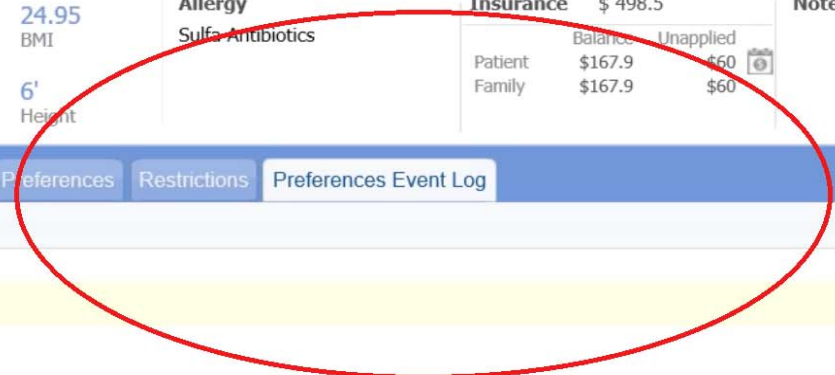
Messaging Online

- Dashboard
- **Messages**
  - Inbox
  - Sent
  - Draft
  - Inbox Archive
  - Sent Archive
- **Tasks**
  - Not Started 4❗
  - In Progress
  - Complete
  - Other
  - Allocated 5
  - All 6
- Today's Patients
- **Orders & Results**
  - Lab 72
  - Procedure 193
  - Radiology 3
  - Consultation 4
  - Other 1
- Referrals
- My Notes 941
- Documents
- CCDA Tracking
- ⊞ KPIs
- **Administration**
  - CureConfirm Status
  - Fax Status Log
  - **TM Status Log**
  - ⊞ **Interoperability**
  - Eligibility
  - Clinical Alerts
  - **Orders & Results**
    - Lab
    - Procedure
    - Radiology
    - Consultation
    - Other
  - **Tracking**
    - Document
    - Message
    - Batch Message
    - HIS Batch

TM Status Log

🔍 Search

Last Name		First Name		Mobile No.	
Type	All ▼	From	[____] 📅 ▶	To	[____] 📅 ◀
Status	All ▼				

Date	Patient	Mobile No.	Message	Type	Status
9/17/2019 12:04:53 PM	Test, Kristina	19195225465	Dear Kristina, You have an appointment with with Dr. on 09/19/2019 11:00AM. Please call (919) 856-2300 to confirm/change.	Scheduled Appointment	Successful
9/16/2019 9:02:13 AM	Test, Kristina	19195225465	Dear Kristina, You have an appointment with with Dr.Kristina Cramarossa on 09/18/2019 08:00AM. Please call (919) 856-2300 to confirm/change.	Scheduled Appointment	Successful
9/1/2019 9:03:19 AM	Bennet, Luke	19014022349	Dear Luke, Dr. wishes you very happy birthday.Have a great day. CMDHC	Birthday Greetings	Successful
8/31/2019 9:01:37 AM	Test, Susan	13369990110	Dear Susan, Your Follow up visit is due on Sep	Follow Up Visit Alerts	Successful

SRA and Audit – Policy Review

- Effective Policy + Staff Training *(refresh review of email and phone references too)*

- Incident Response and Breach Notification Policy Updated

- Compliance to Policy Review of Message Content in Practice+Device Config+TM Alerts

SRA and Audit - Testing

- Substantive Sample Testing of Patient Alert Preferences to Patient Profile and Preferences Event Log

- Substantive Sample Testing of Patient Opt-Out to Preferences Event Log

- Special Considerations for Telehealth (Facetime)

Let's have a conversation...

Thank You!

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