CONNECT Patient Interface Training

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Contents

Patient Interface Training Walkthrough

Introduction

In this training, you will learn how to set up the Patient Interface, how to setup and use email through **CONNECT** and how to setup data collection automation in **CONNECT**.

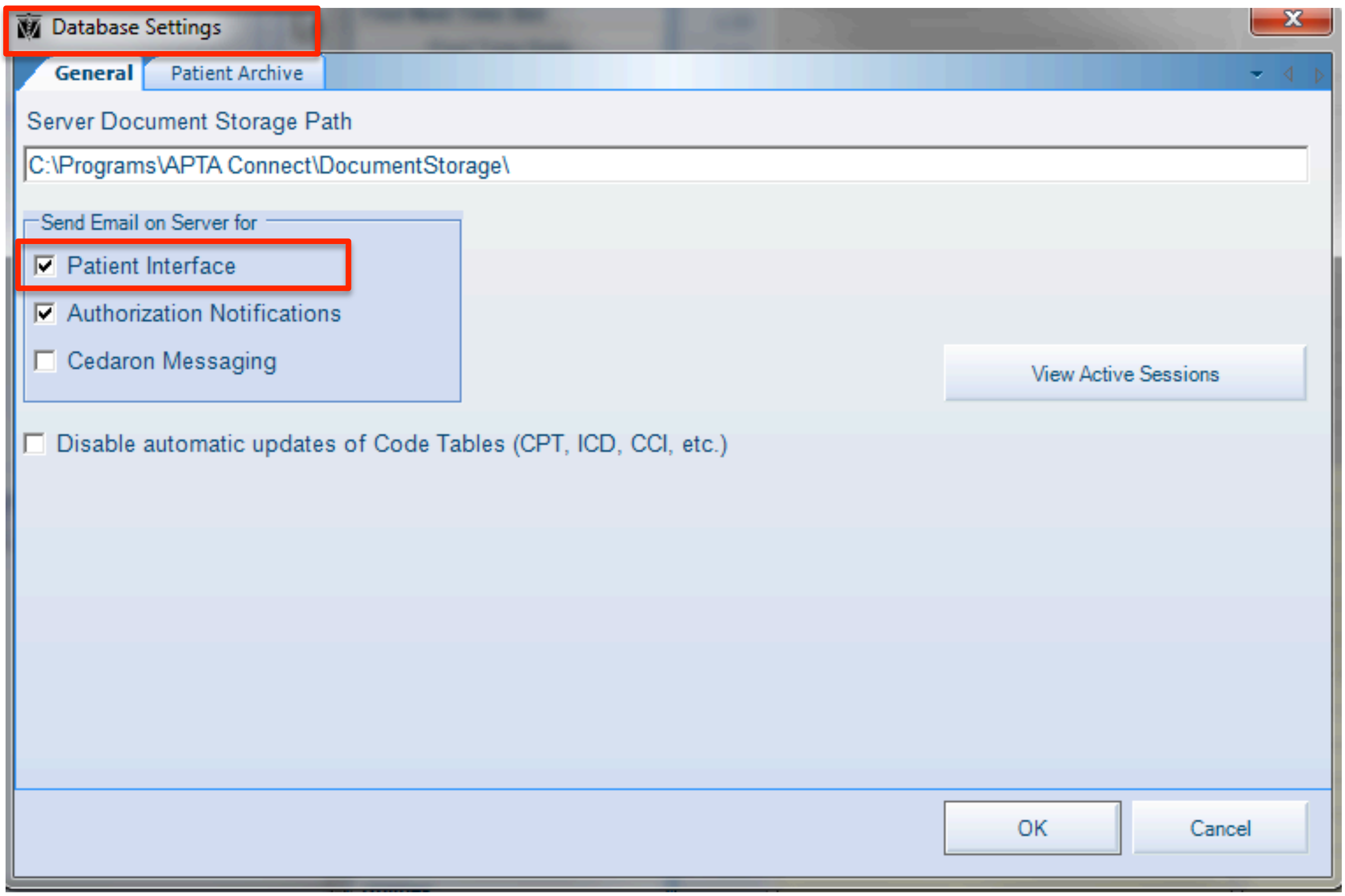
The Patient Interface allows you to send surveys to patients via email or through designated kiosks within your facility.

If your organization chooses to send surveys via email, the patient's email must be captured and entered into **CONNECT** prior to sending the survey.

Once the patient completes a form, it will automatically be uploaded into their clinical record.

Enabling the Patient Interface

If your patient interface is turned off, please go into the **Utilities** drop down menu on the top bar and scroll down to **Database Settings**. Make sure the P**atient Interface** box is checked. If the icon still isn't showing on the patient dashboard, please contact the Cedaron Interface Specialist.

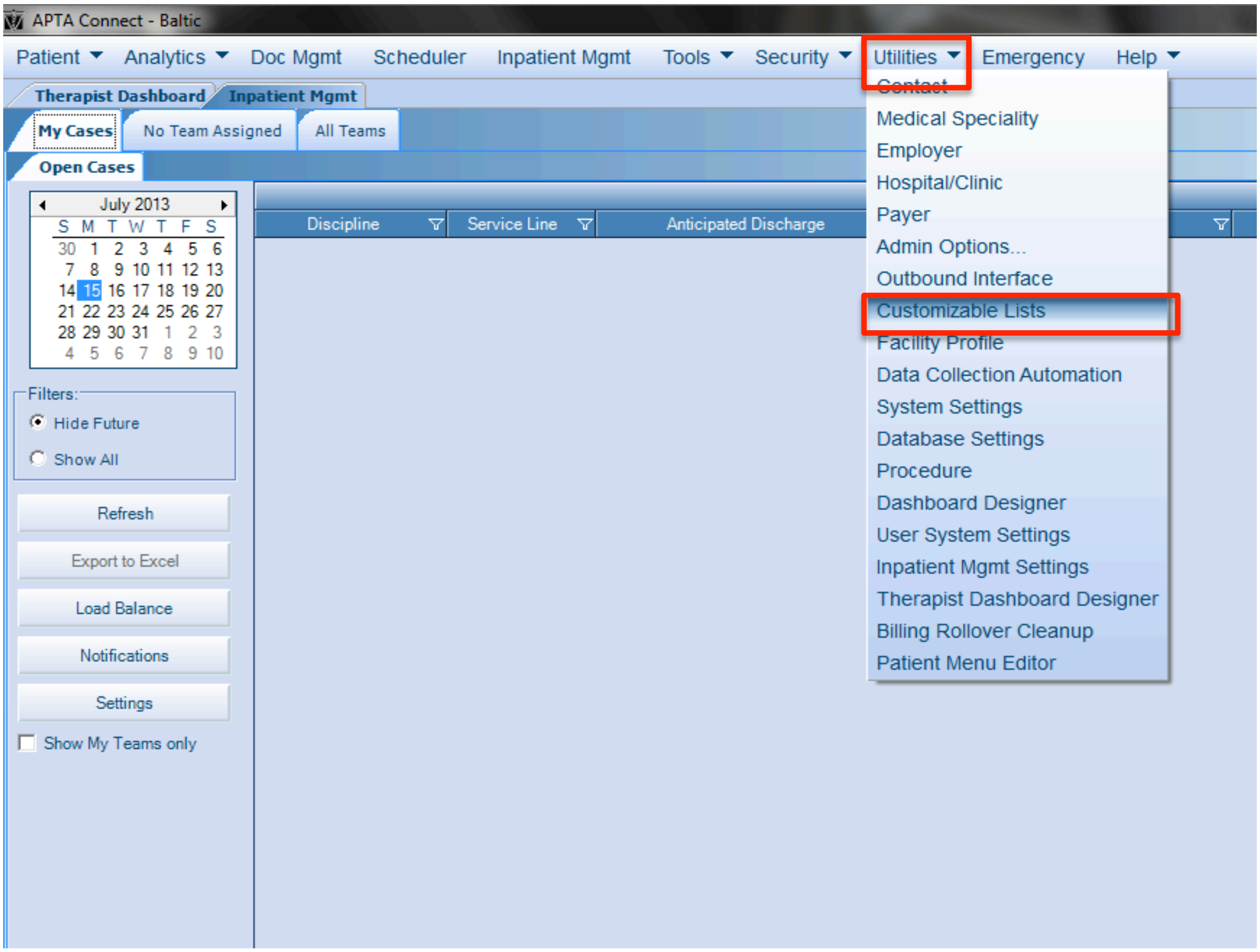


Patient kiosks are designated computers for a patient to use in order to complete surveys.

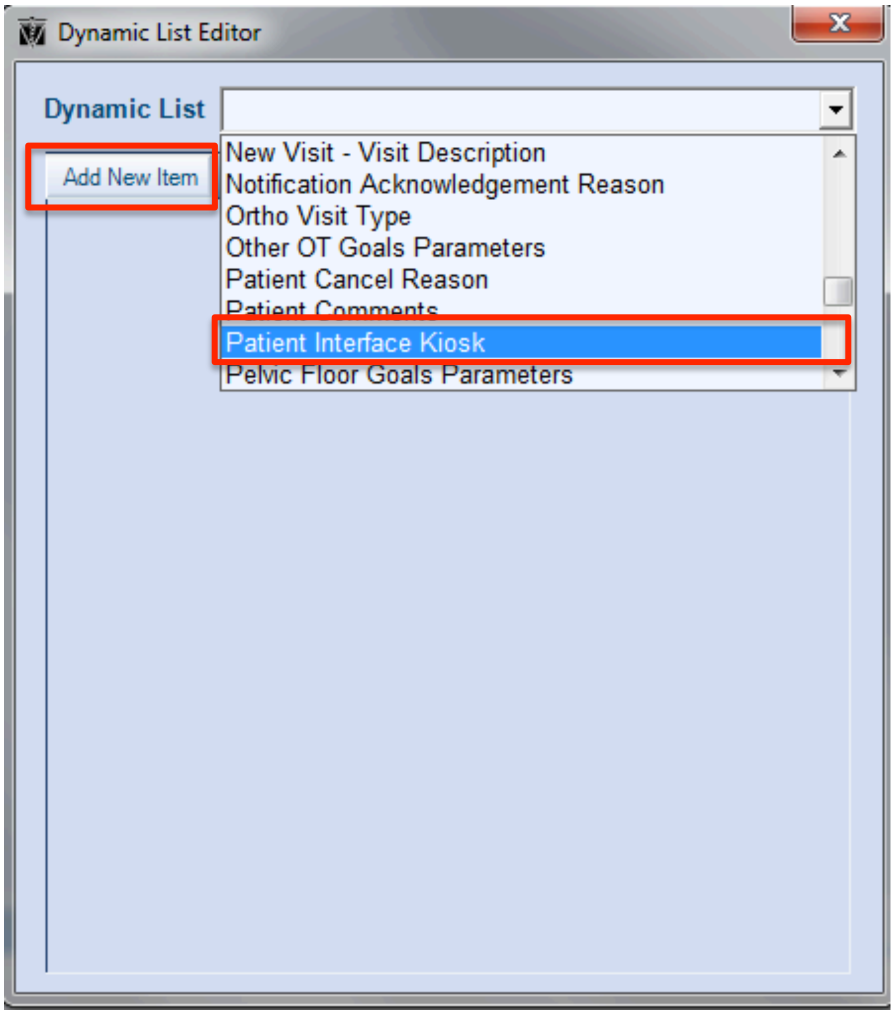
In order for the kiosk function to work in **CONNECT**, devices need to be assigned to receive the patient surveys sent from **CONNECT**.

Setting Up Kiosks

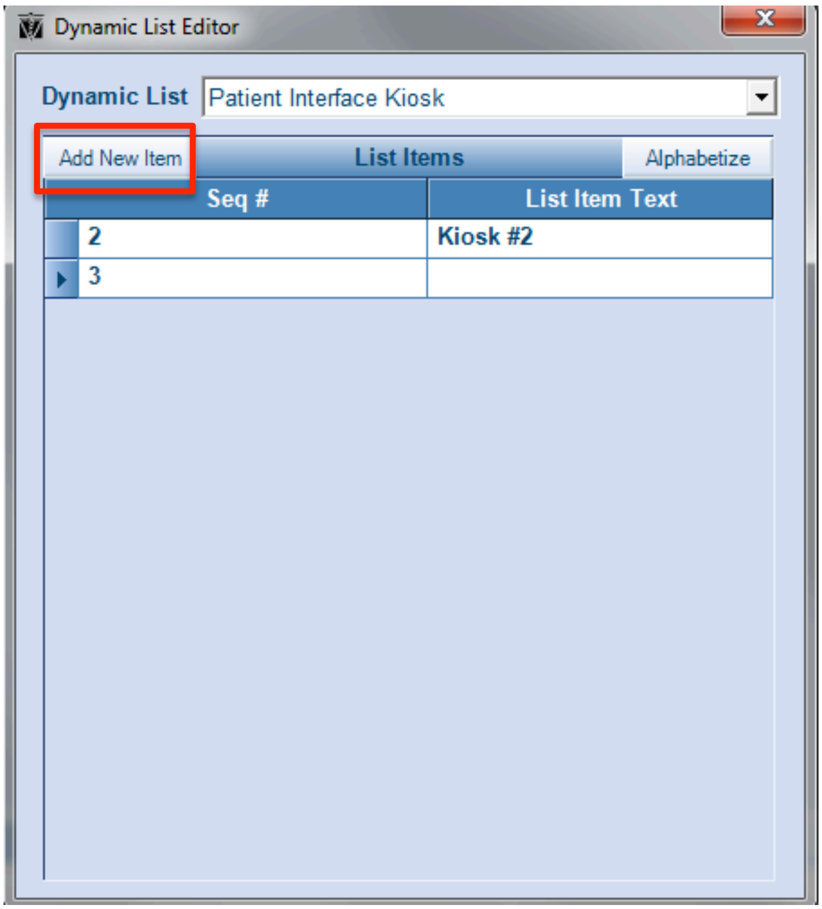
To set up the kiosk function, log into your CONNECT program and navigate to the **Utilities** menu and then click **Customizable Lists**.



The Dynamic List Editor window pops-up, click the drop down for the **Dynamic List**, and click on **Patient Interface Kiosk**.



In the **Dynamic List Editor**, click the **Add New Item** button to add a new device to receive patient surveys for completion.

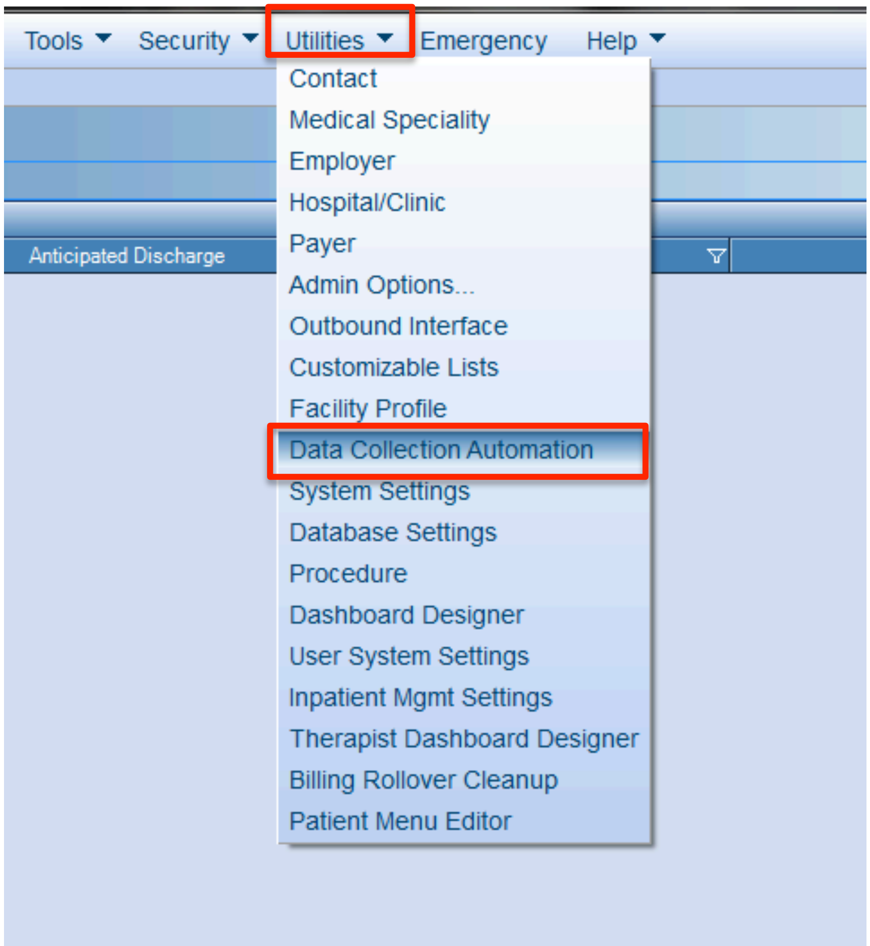


Under the **List Item Text**, write in a description of the device. It is important to be very descriptive so any staff will be able to identify specifically which device is being used.

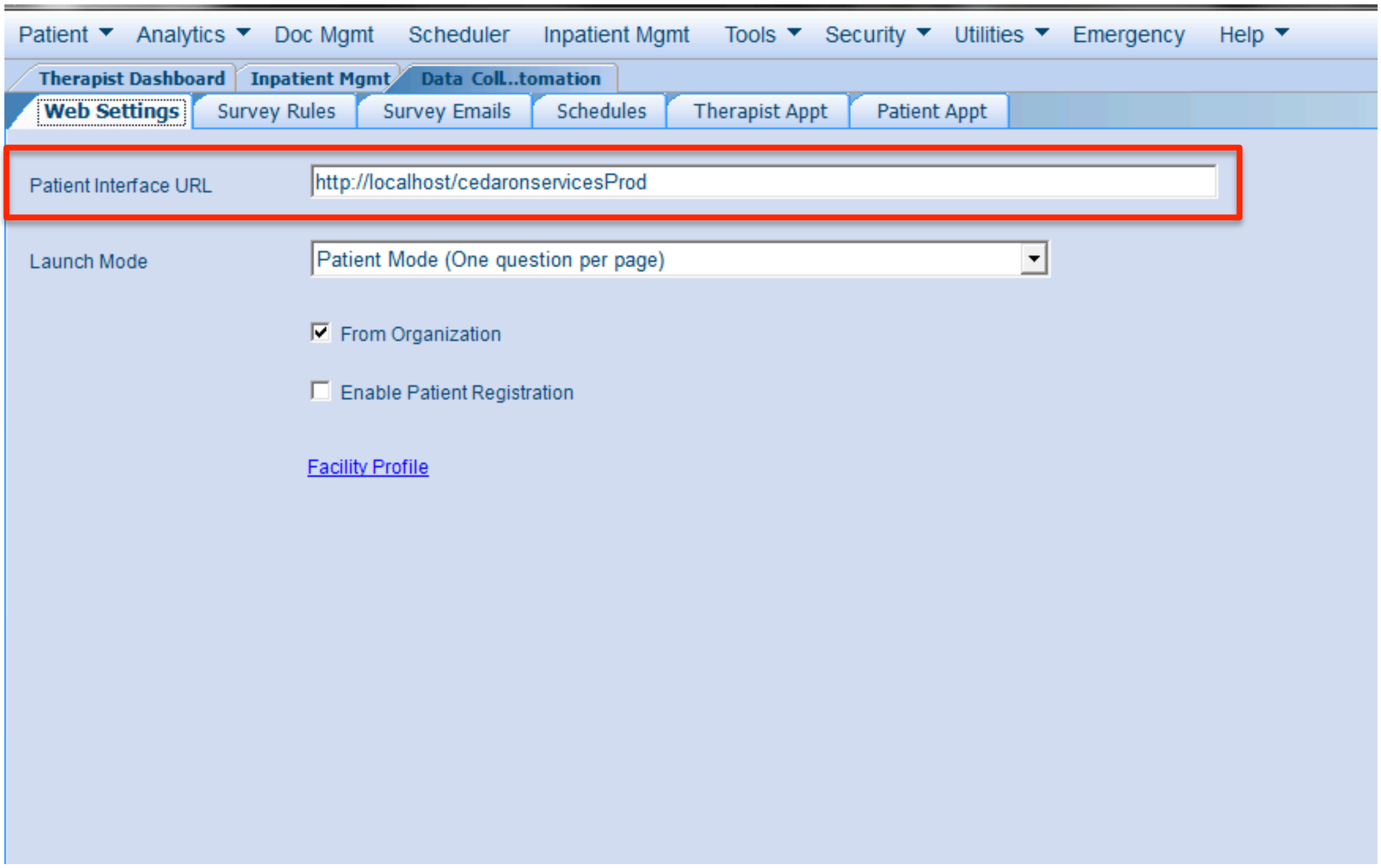
Once you have added all appropriate devices, click on the red **X** at the top right of the pop-up window to save and close.

To assign each device as a kiosk, you will need to navigate to the patient interface URL.

Click **Utilities** in the top menu and then scroll through the drop down box and click **Data Collection Automation**.


Tools
Security
Utilities
Emergency
Help
Contact
Medical Speciality
Employer
Hospital/Clinic
Payer
Admin Options...
Outbound Interface
Customizable Lists
Facility Profile
Data Collection Automation
System Settings
Database Settings
Procedure
Dashboard Designer
User System Settings
Inpatient Mgmt Settings
Therapist Dashboard Designer
Billing Rollover Cleanup
Patient Menu Editor
Anticipated Discharge

In the screen that pops-up you will see the Patient Interface URL.

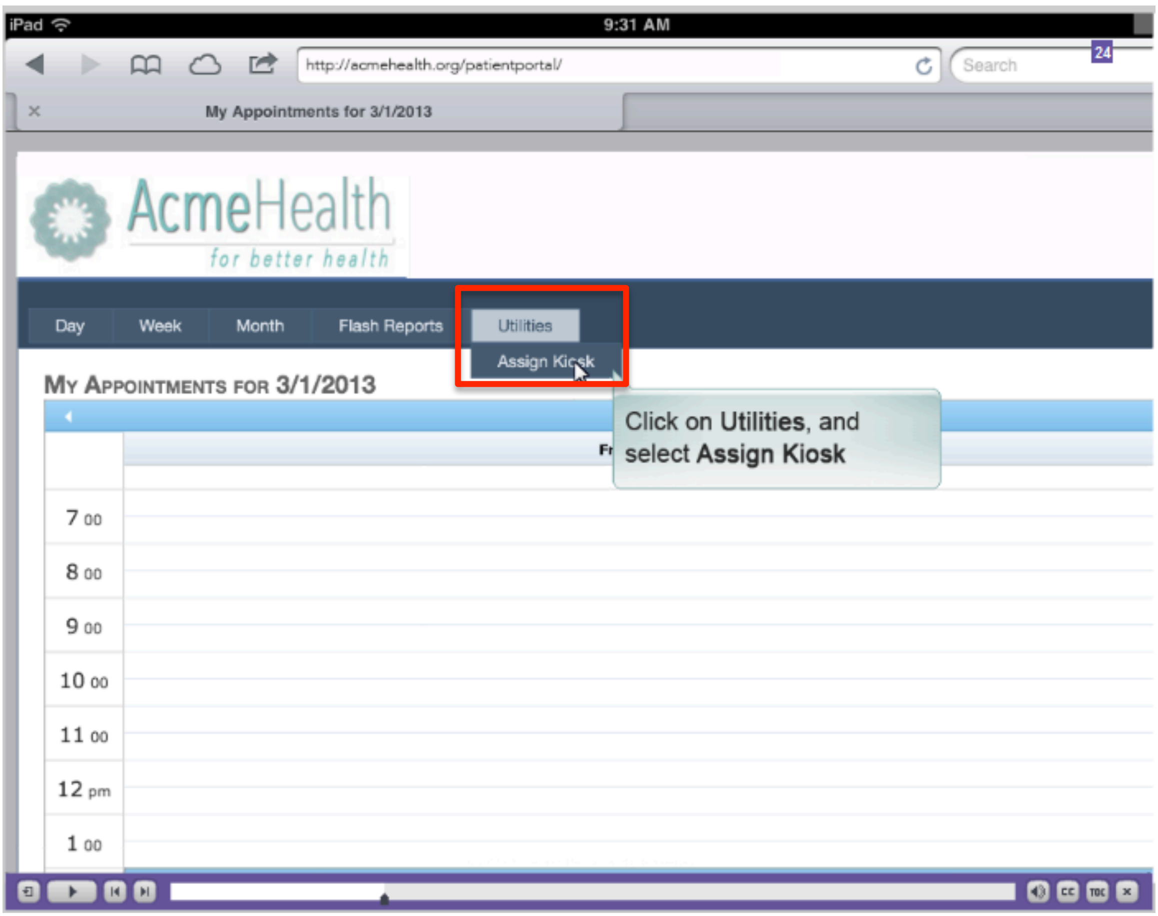


This is the URL you will type into the URL bar of the kiosk device. The best way to do this will be to copy the link and paste it into an email that you send to the kiosk device. Open the email in that device and click on the link. Log into the patient interface as an employee with your **CONNECT** credentials.

Please note, each organization will have a custom link.

The kiosks will not need **CONNECT** installed, only Internet access.

Once you've logged into the Patient Interface from the assigned device, click the **Utilities** tab and then **Assign Kiosk**.



Select your kiosk from the list and assign the device name and then click **Save**.

You can now send surveys to this device.

Capturing Patient's Email Addresses

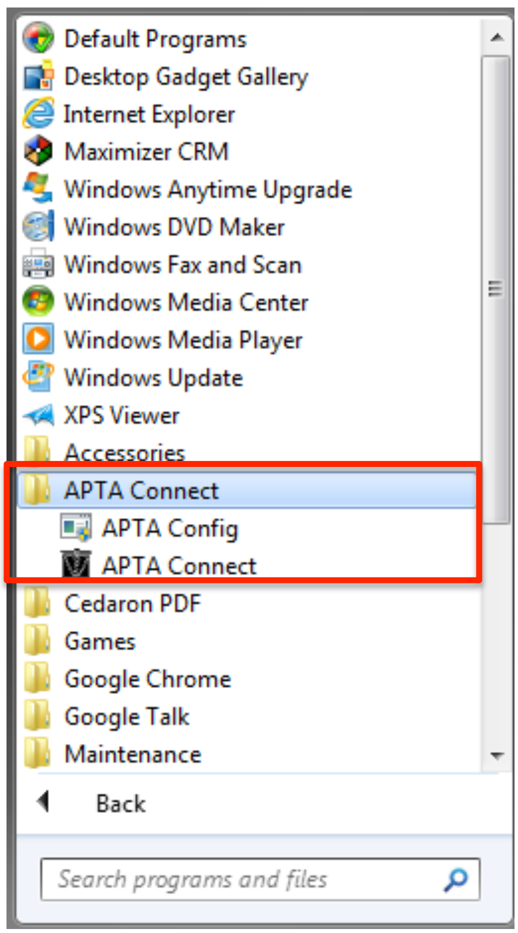
Before emailing surveys or questionnaires to patients, you will need to ensure you have the patient's email address captured. This information can be stored on the patient's dashboard, under the demographics box. To enter a patient's email address, click the red **Demographics** hyperlink

Once in the demographics window, the patient's email address can be found towards the bottom.

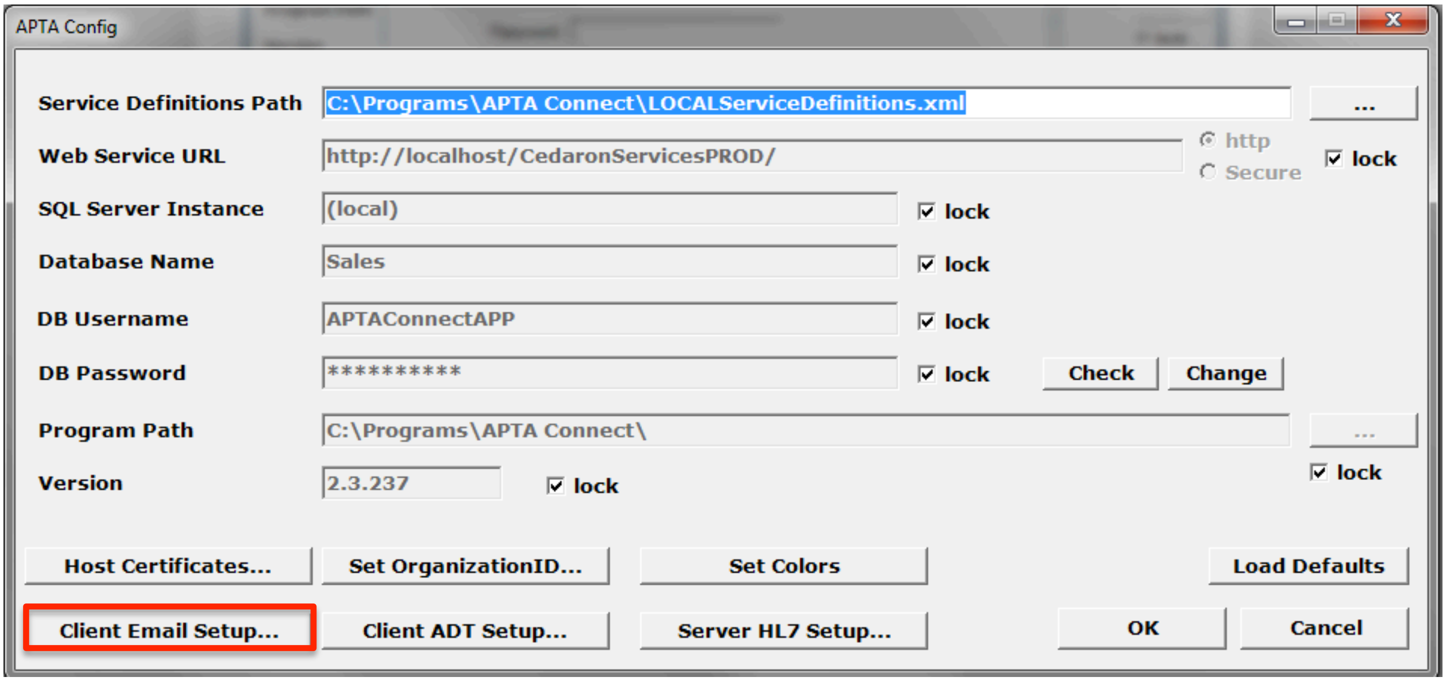
Setting up e-mail for your Patient Interface

To set up your workstation to send surveys to patients via email start by clicking the **Start** button in your Windows system.

Next, click **All Programs**, and navigate to the **APTA CONNECT** folder.

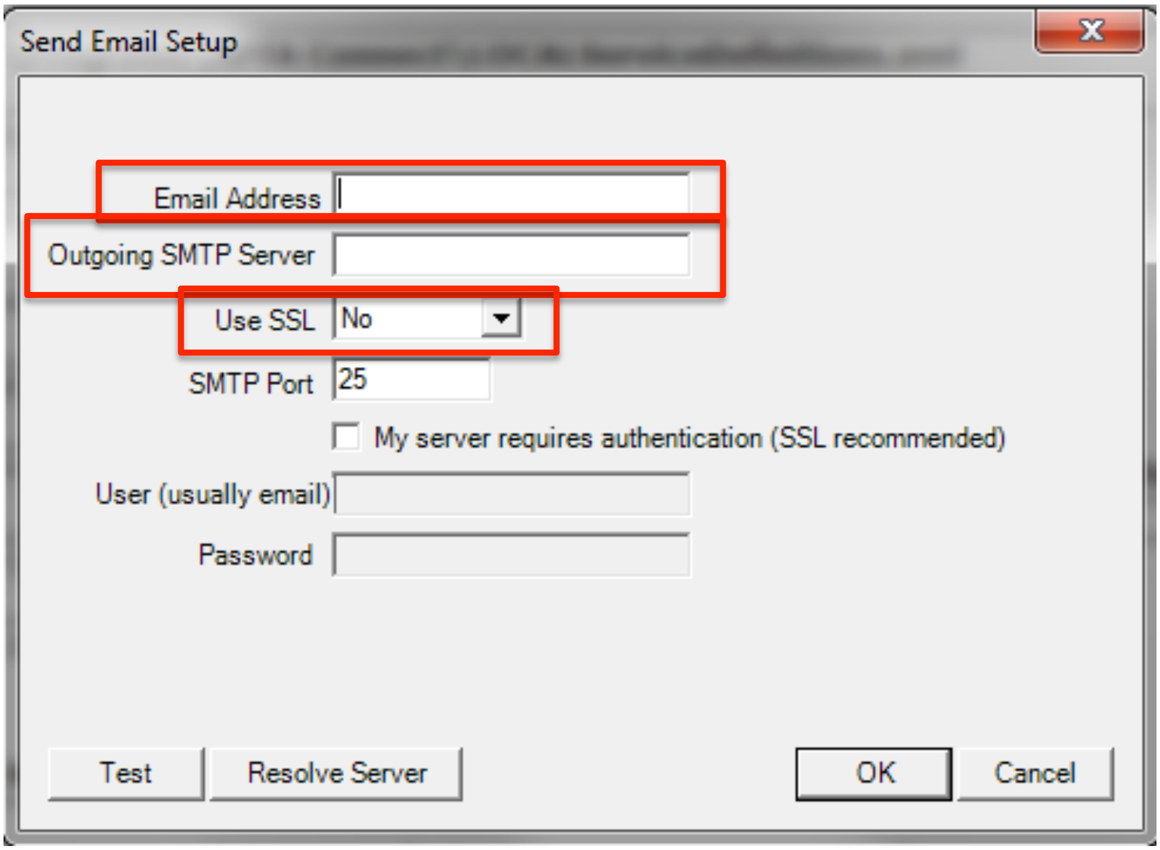


Next click the **APTA Config** folder to open the program and then click **Client Email Setup…**



The window that pops up is the setup screen where you will need to enter information into specific fields to setup your email.

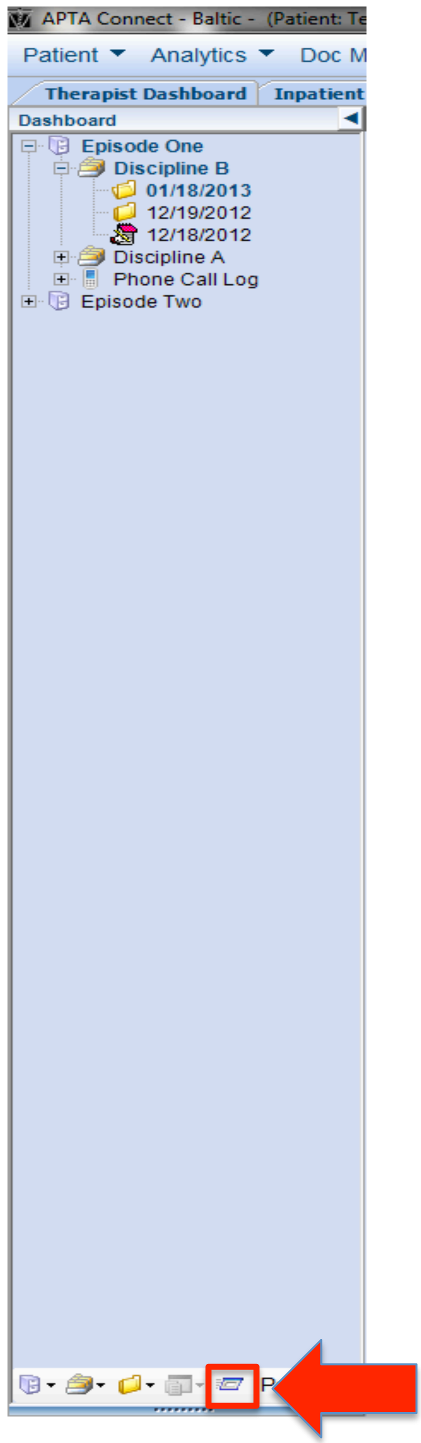
If you are not sure what to enter, please contact your onsite IT resource.



CONNECT is pre-loaded with surveys that can be sent out using the **CONNECT** patient interface.

Assigning a Survey to a Patient via Kiosk

To assign a survey to a patient, open the patient's dashboard, select a visit and then click on the **Patient Interface** icon (see red arrow at bottom of screen shot below).



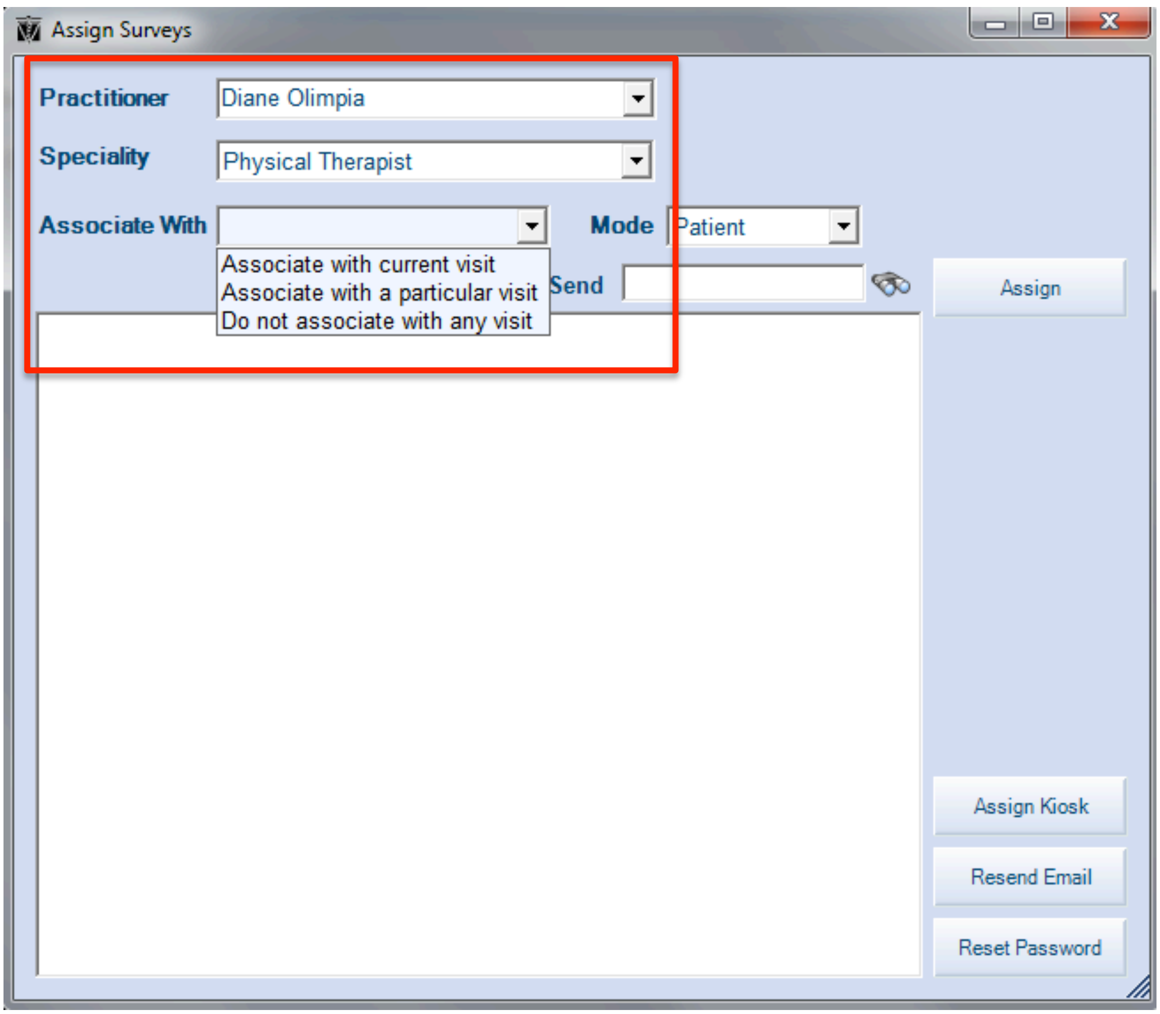
As you can see, the **Assign Surveys** dialogue box pops up.

Now, let's go through each of the fields in the Assign Surveys dialogue box.

The **Practitioner** field defaults to the therapist of record, but you can change this by clicking another therapist from the drop-down list.

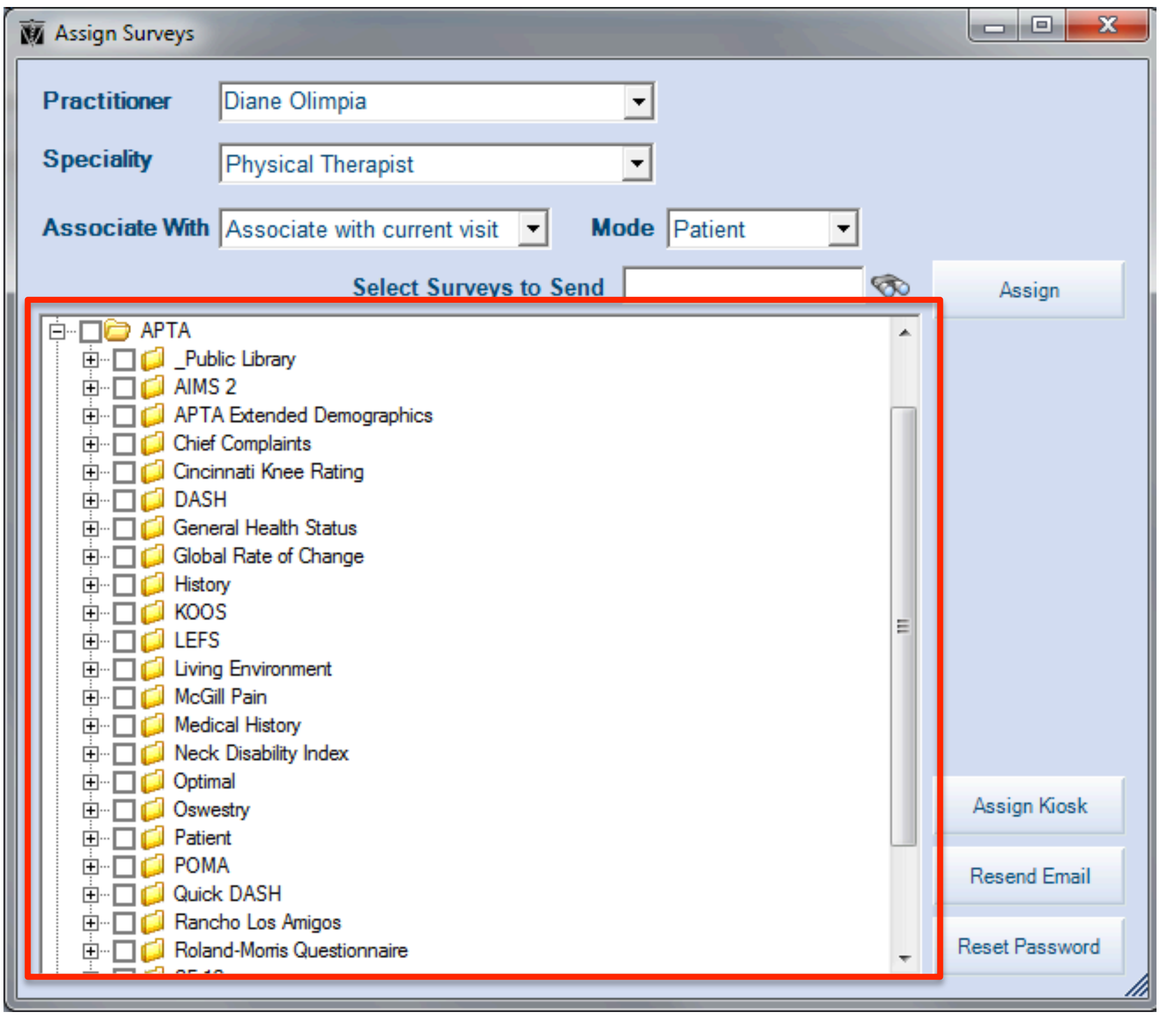
The **Specialty** field will be populated based on the contact information of the practitioner in the first field.

The **Associate With** field gives you the option of choosing which visit to associate the survey to. This field must be populated to proceed.



Based on which visit you associated the survey with, the white area of the screen will populate with surveys you may send to that patient.

Based on which visit you associated the survey with, the white area will populate with available surveys to send to the patient for that visit. Click the surveys you would like the patient to receive. You can choose as many surveys as you would like. Later you will be taught how to custom build surveys in Survey Builder Training.



The Mode button defines the format that the patient will receive the survey.

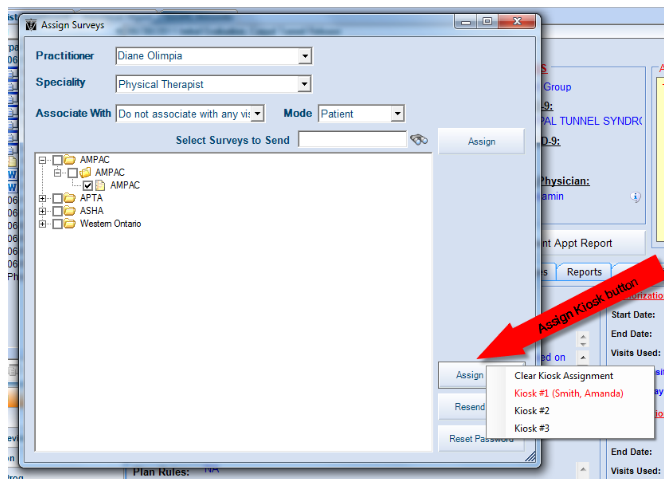
Patient mode displays one question at a time with a continue button to take the patient to the next question.

Clinical mode displays all the questions on one page.

If you are looking for a specific survey, you can utilize the **Select Surveys to Send** box.

If you are sending the surveys to a kiosk, send the survey to a device by clicking the **Assign Kiosk** button.

- A list of devices will pop up.
- If a device is displayed in red, it is not available for use at that time
- If a device is displayed in black, it is available for use at that time



To free up a specific device, go to the dashboard of the patient that is supposed to be at that device, click the **Patient Interface** icon, click the **Assign Kiosk** icon and then click the **Clear Kiosk Assignmen**t button.

This is useful if patients cancel appointments or if they did not complete the survey at a kiosk.

If you need to resend the survey via email, click the **Resend Email** button.

The R**eset Password** button sends the patient a new password to access the Patient Interface via email.

Once you've chosen the appropriate surveys and assigned the kiosk click the **Assign** button to send the survey.

You will see a confirmation box indicating the email has been sent.

Data Collection Automation

Data collection automation tells **CONNECT** to perform automated tasks based on pre-determined milestone.

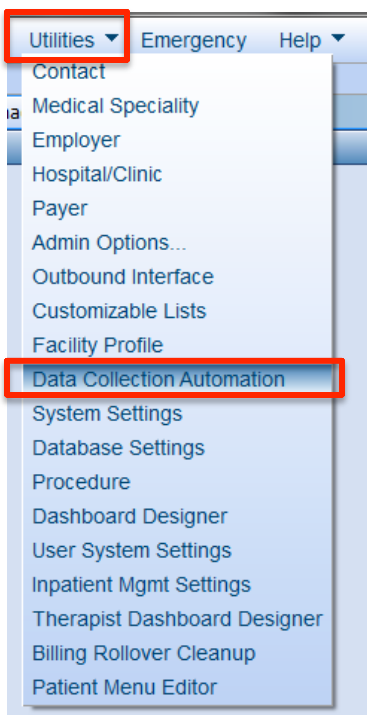
For example, you can configure the system to send out specific surveys based on occurrences in an episode of care, such as:

- First clinical visit
- Scheduled re-evaluation
- Specific responses to previous surveys

The automated data collection (sending surveys to patients) only works via email. It will not work via kiosks.

Start by logging into **CONNECT** and then navigating to the **Utilities** menu.

From the drop down list, click on **Data Collection Automation**.



A new screen with six different tabs will show in your **CONENCT** program.

Web Settings Tab

You may recognize the information on the first tab as it contains the Patient Interface URL.

If the URL is missing please go back to step #20, copy it from that location and paste here. This will need to be done for each facility.

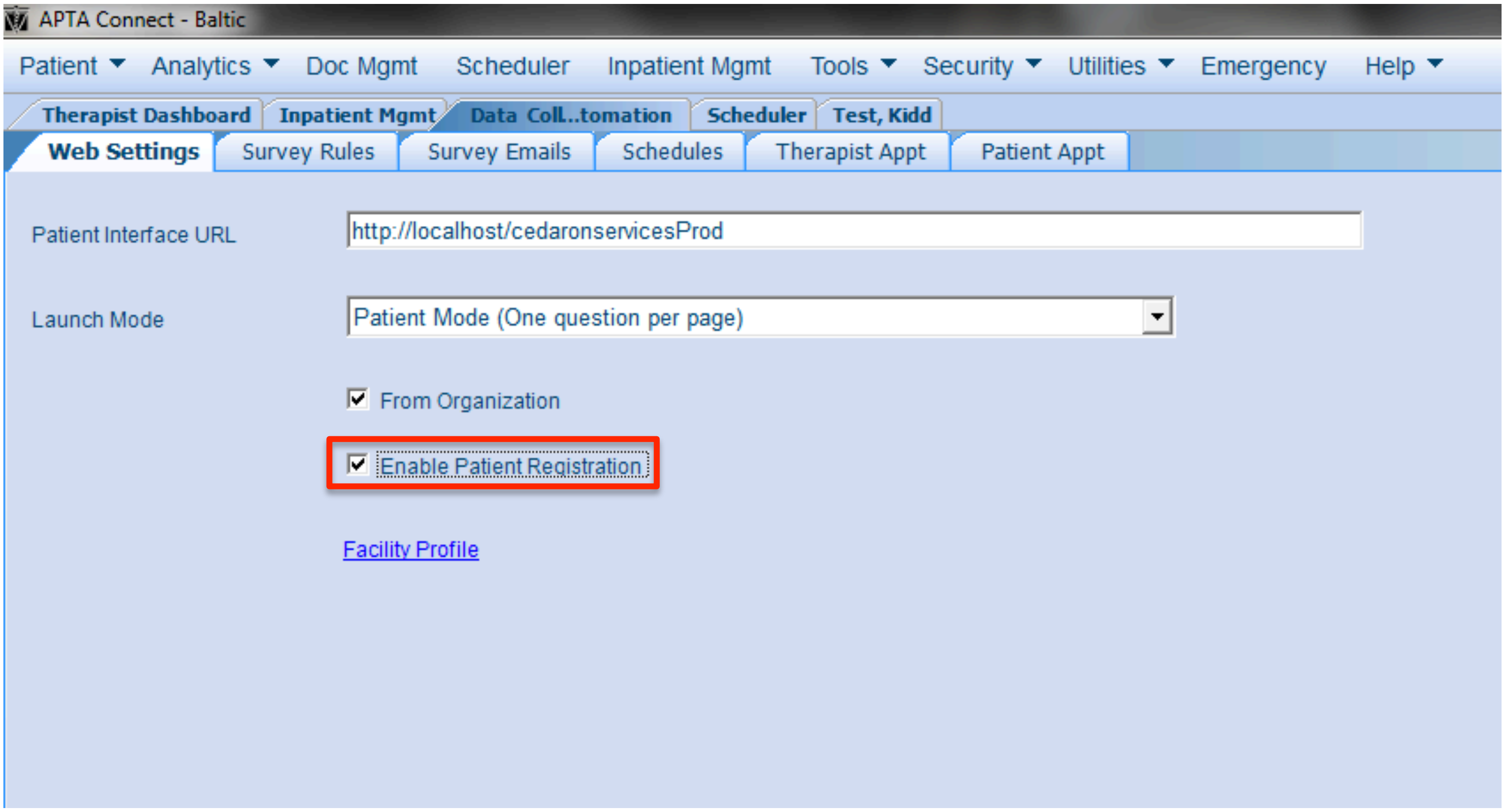
Additionally, there are several other fields.

Launch Mode allows you to choose the pay patients will read a survey

- Patient mode is one question at a time
- Clinical mode is all the questions on one page

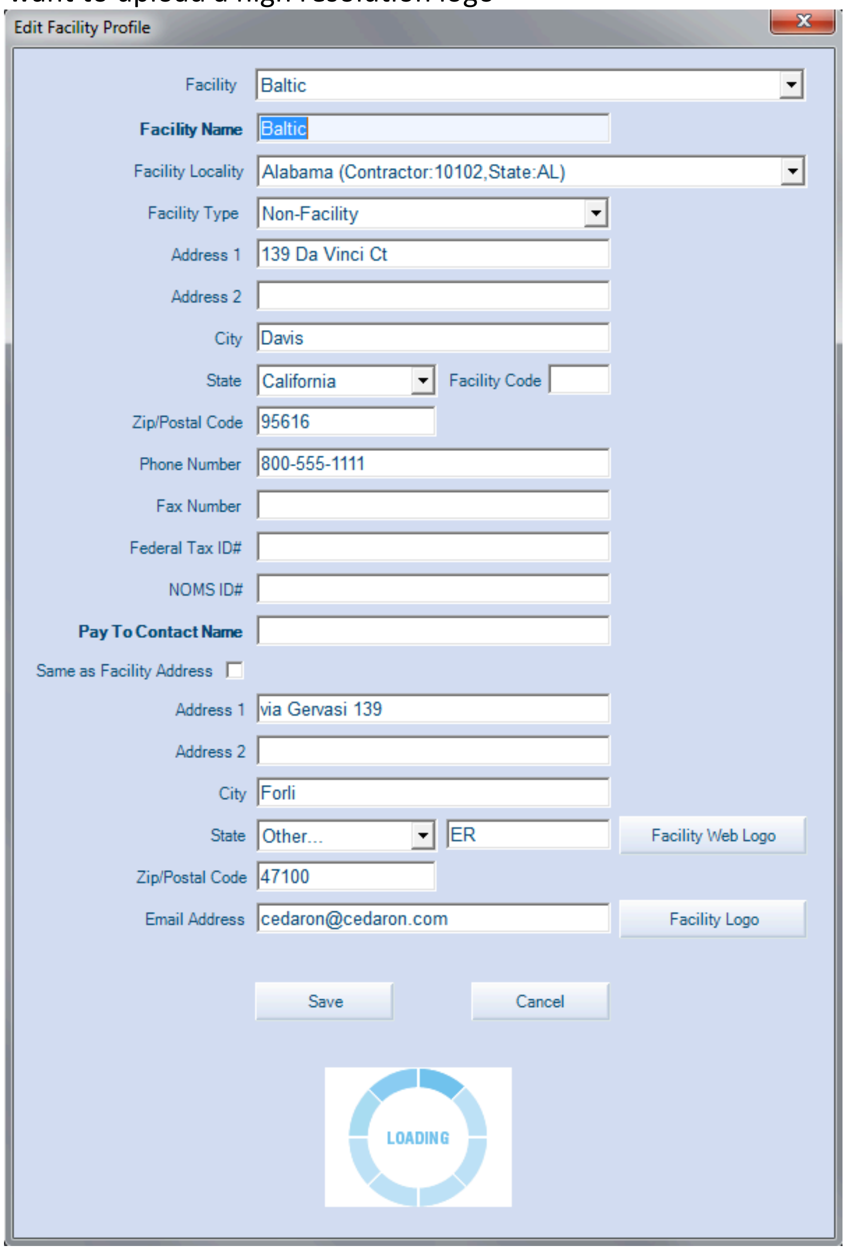
By clicking the **From Organization** box, surveys sent to patients will have your organization's name displayed as the send.

By clicking the **Enable Patient Registration** button, allows a patient to register via a kiosk.



The blue, **Facility Profile** link, will allow you to edit the following information in your facilities profile.

- Facility – select your facility from the dropdown list
- Facility Name – the name of your facility (if it differs from above)
- Facility Locality – Use the dropdown menu to select your location (for Medicare purposes)
- Facility Web Logo – upload your organization's logo for printing purposes. Please note, you will want to upload a high resolution logo



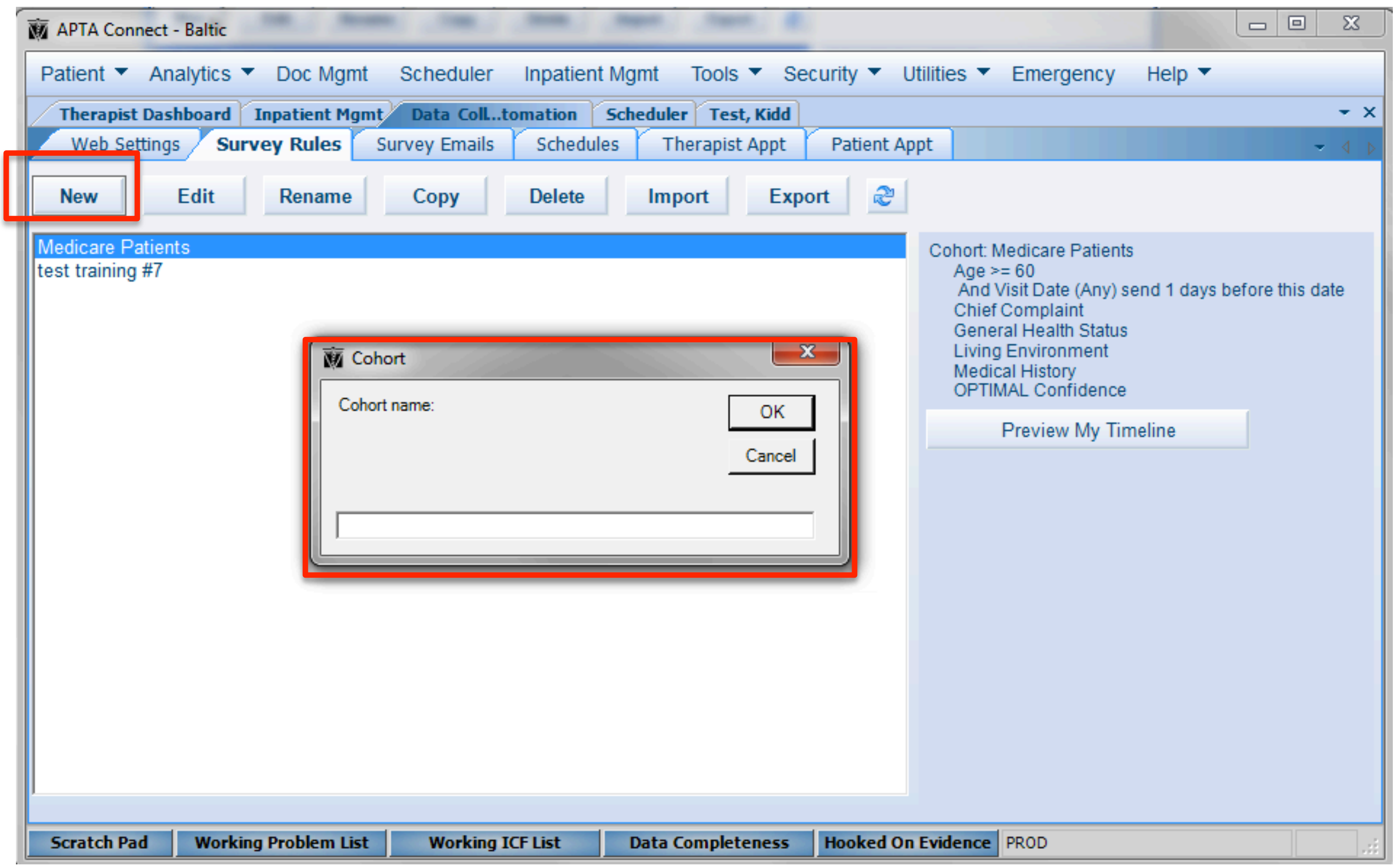
Save – When you have completed editing your facility's profile, click **Save**.

Survey Rules Tab

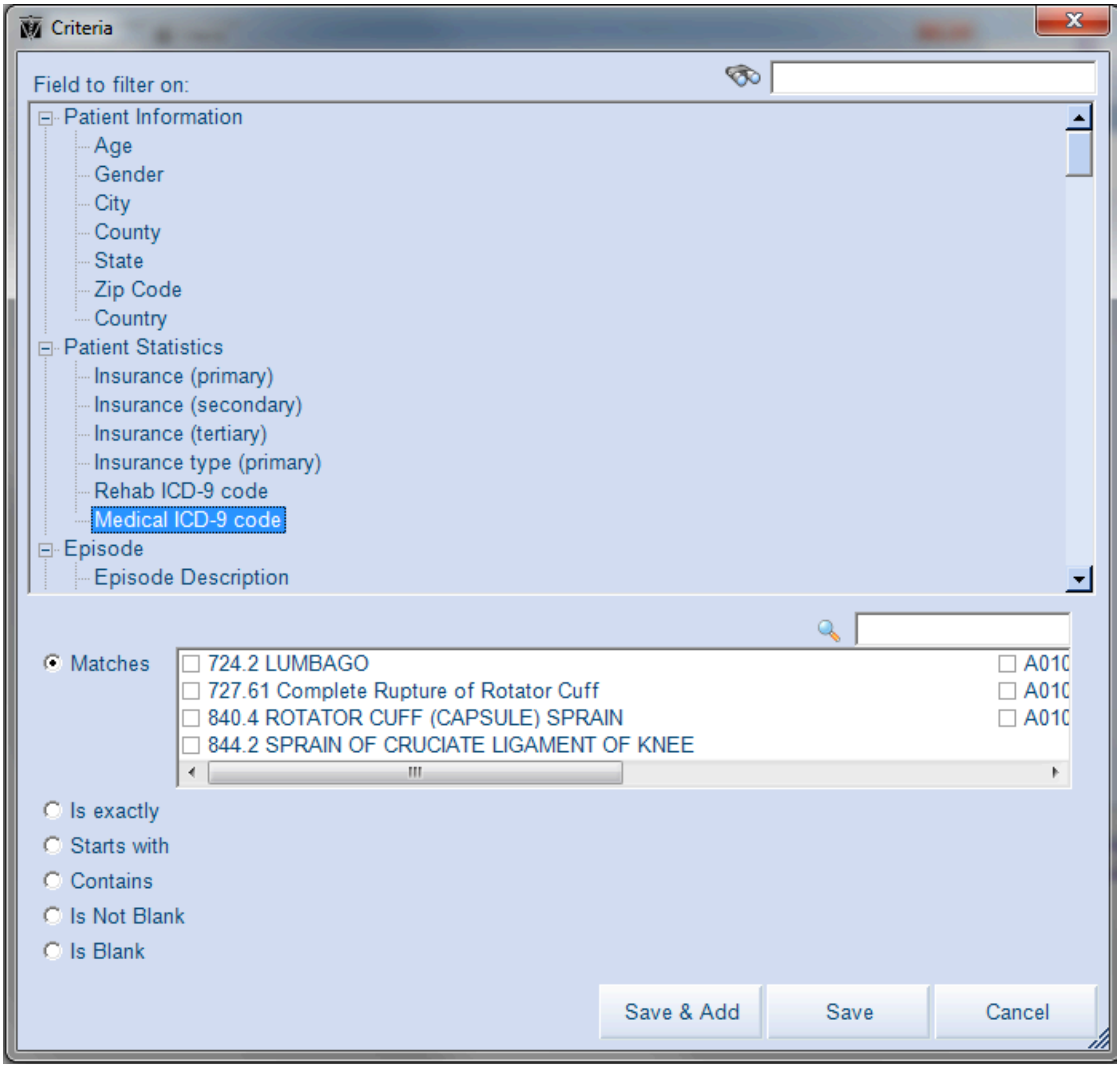
The next tab is **Survey Rules**. This is where you set up groups so **CONNECT** can recognize which groups or patients need to receive certain surveys at pre-determined intervals or based on certain rules. These groups are also called cohorts.

Create a new cohort or group by clicking the **New** button.

Enter the name of the cohort in the pop-up window.

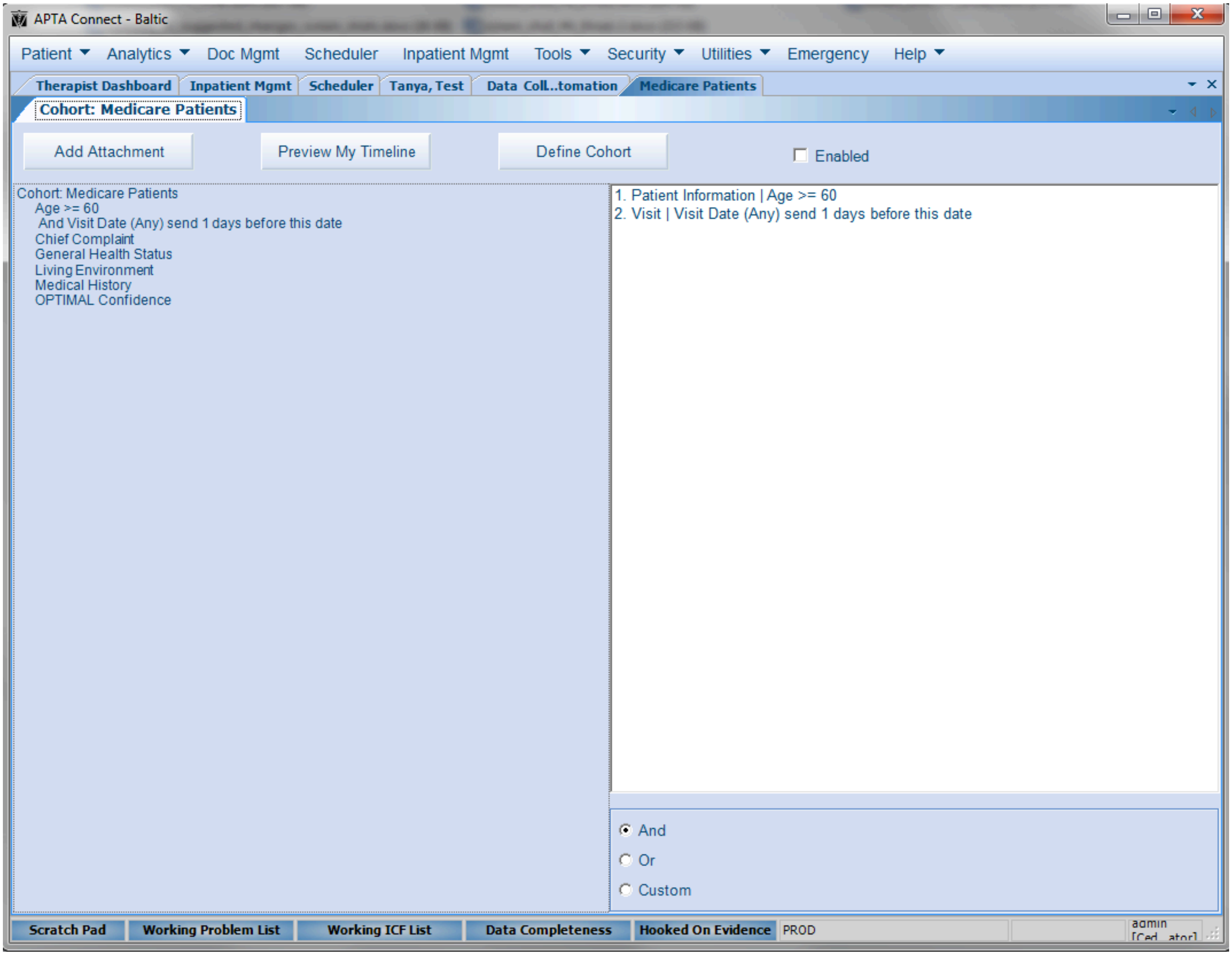


The next window that pops up lists the criteria you may choose from for the cohort you just created. To click a particular criterion, highlight it and fill out any additional information that populates the lower half of the screen.



Edit an existing cohort or group by highlighting the group and then clicking the **Edit** button.

As you can see, a new window will pop-up.



From here you can add an attachment by clicking the **Add Attachment** button.

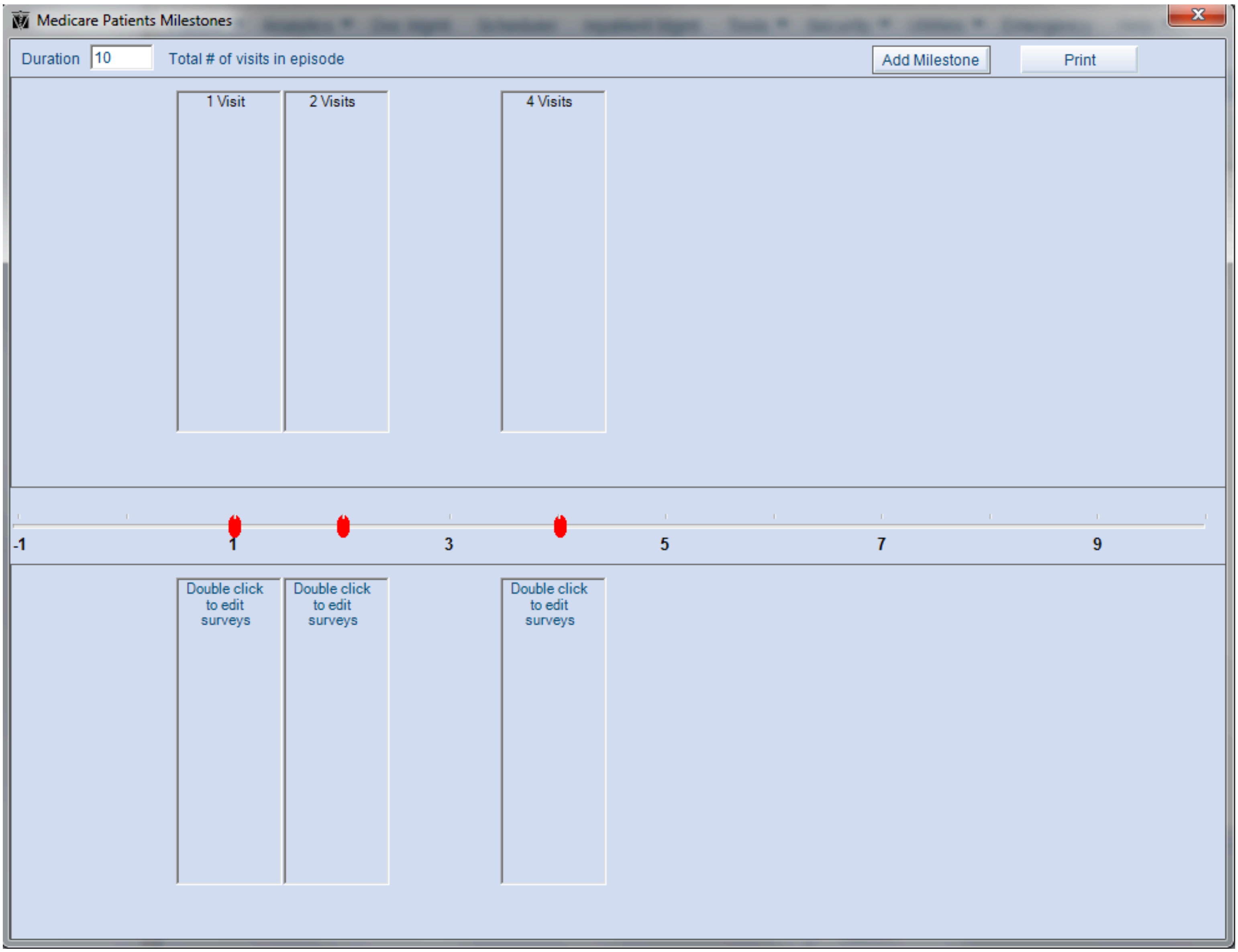
Please note that the **Enabled** box must be checked for this feature to begin emailing surveys.

Clicking **Preview My Timeline** will cause another window to pop-up that asks which Field you want to filter the cohort on and triggers the system to send out the survey.

For example, you may want to filter a cohort based on the number of visits a patient has had or after discharge.

Patient Statistics is usually the most common field to filter by.

The next screen (below) will allow you to **Add Milestones** to adjust which surveys go out a certain milestones.



The remaining buttons on the **Survey Rules** tab include:

Clicking 'Rename' will allow you to rename an existing cohort.

Clicking 'Copy' will allow you to copy a cohort. This is helpful if you are creating a new cohort with similar properties.

Clicking 'Delete' will delete the highlighted cohort.

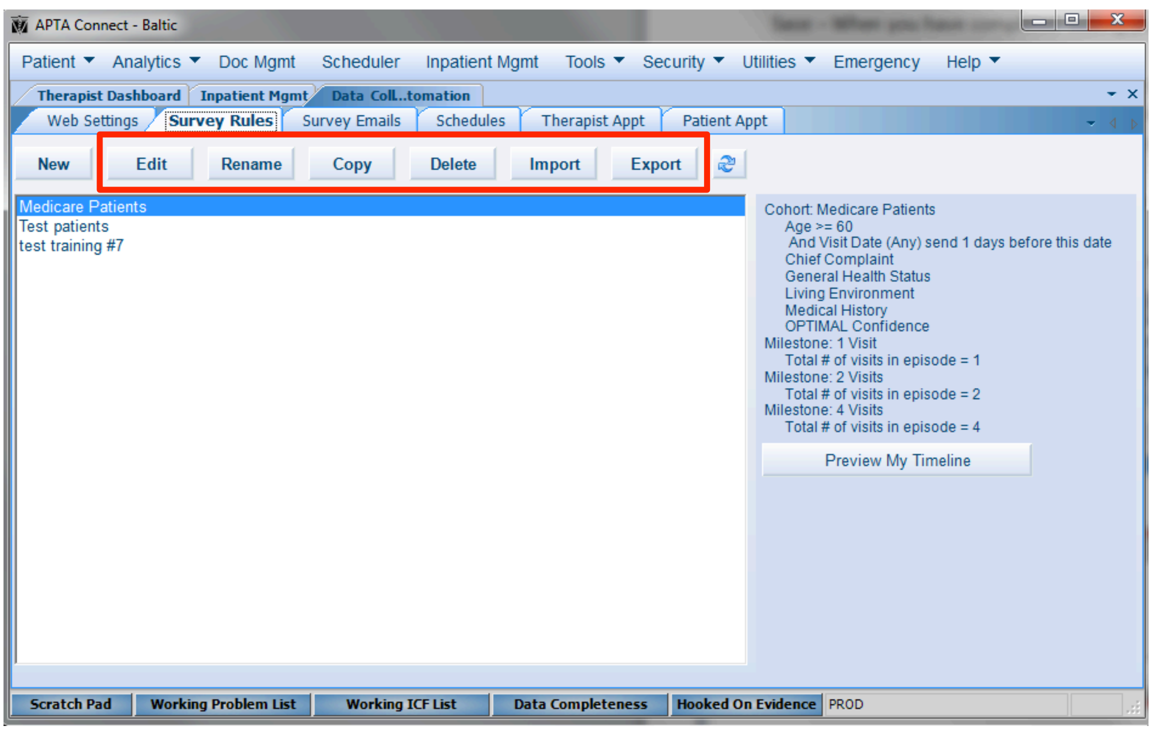
The 'Save & Add' button allows you to choose criteria, save and then add another criteria.

The 'Save' button allows you to save and exit this window.

The 'Cancel' button will cancel out of the window.

The 'Import' button will import a patient interface file.

The 'Export' button will export a patient interface file.



Survey Emails Tab

The next tab is the S**urvey Emails** tab.

This is where you would edit the content of the email that the patient receives along with their surveys.

Please do not edit the tags or the double angle brackets in the survey. Tags are identified by any text and the surrounding << >>.

The **Message** box, lets you select which email message you would like to edit.

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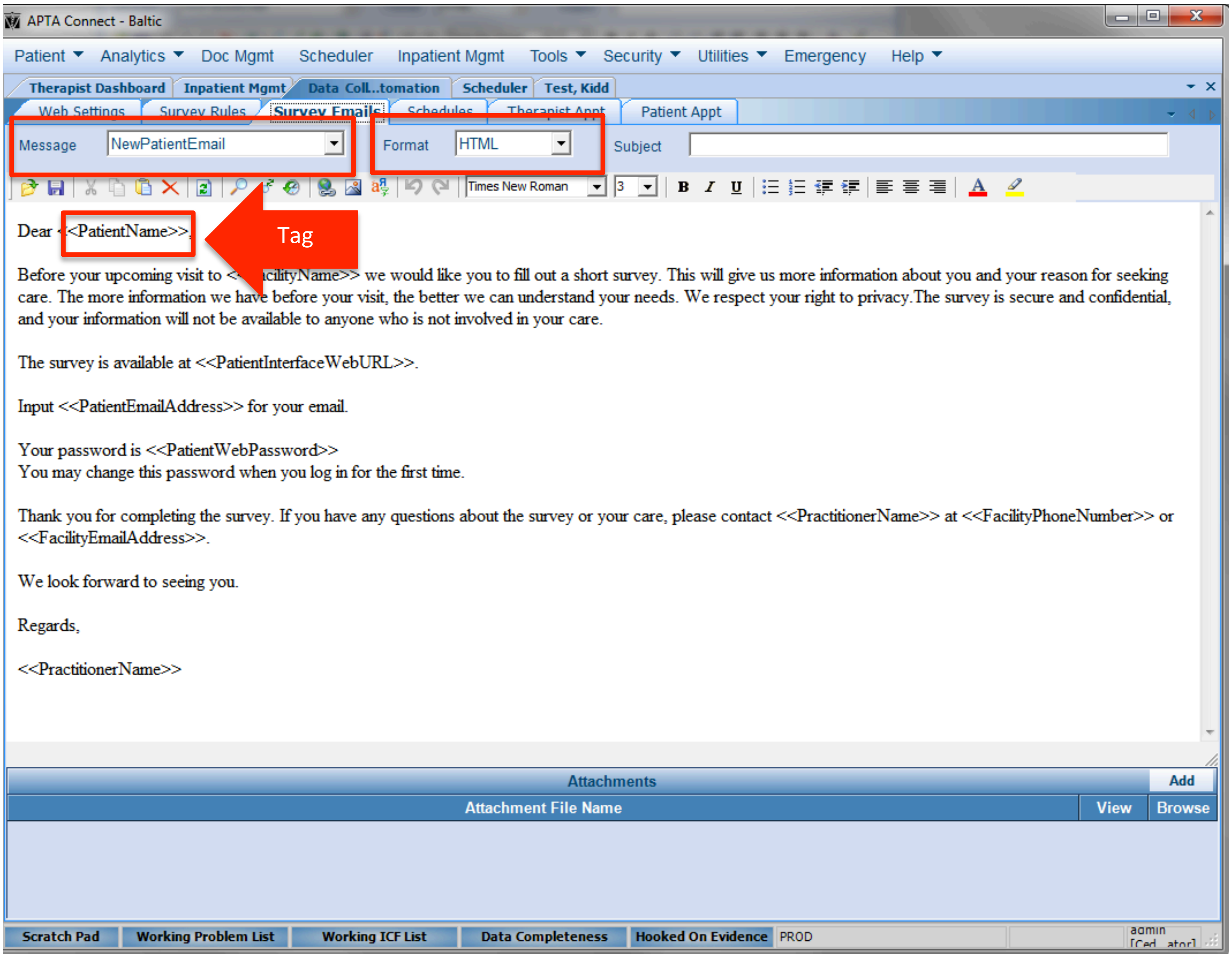
The **Format** box allows you to customize the email by adding images and formatting the text (if you use HTML). You may also add an attachment if you'd like to include specific facility documents (maps, etc.)

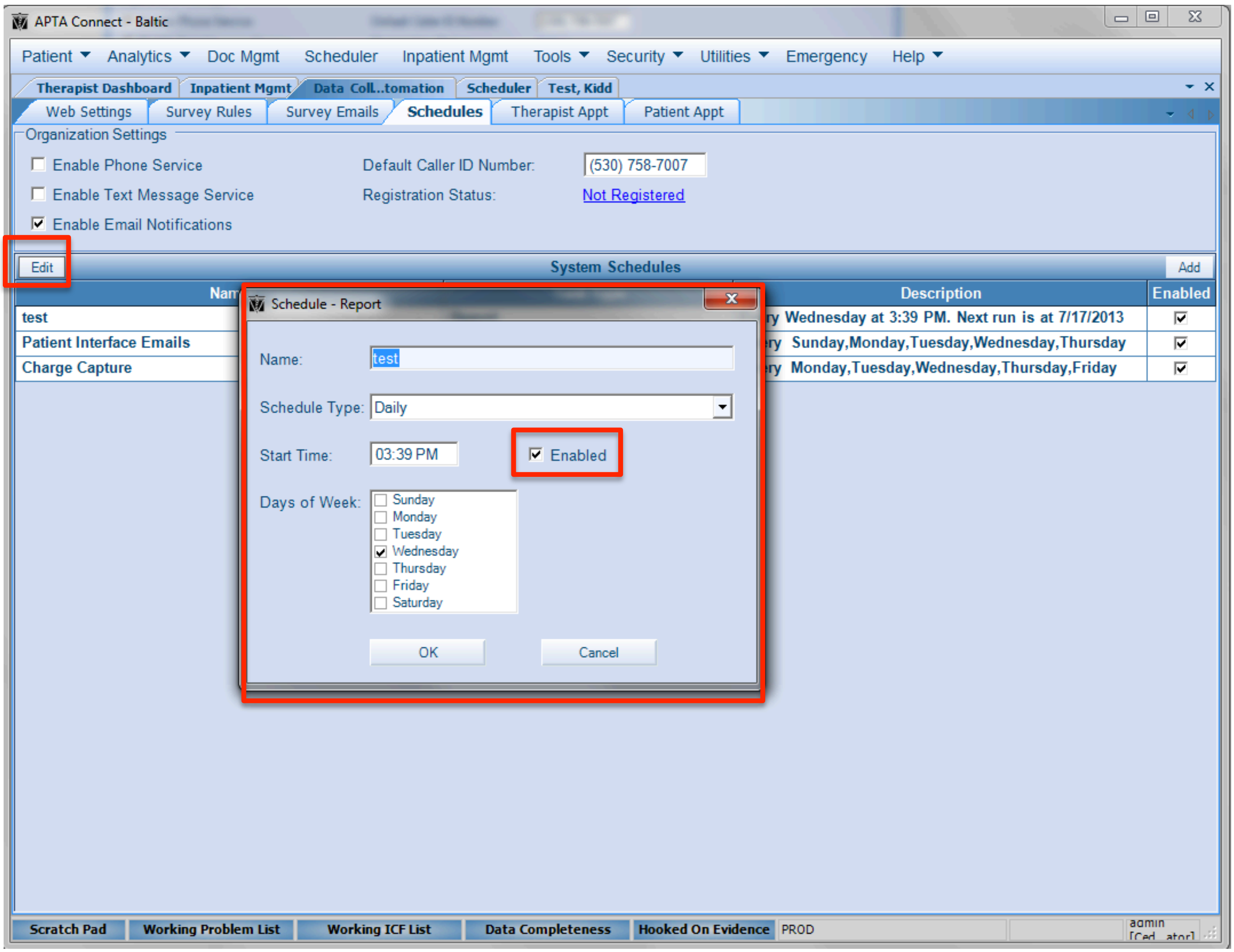


Scheduler Tab

The next tab is the **Scheduler** tab.

Click the **Edit** button to add the variables to schedule delivery of the surveys to patients.

The **Enabled** box must be checked, before clicking the **OK** button.



To create a new schedule, click the **Add** button.

A Schedule Dialogue Box will pop-up.

Complete each box as needed to determine the schedule for the surveys to be sent out.

We recommend the **Schedule Type** to be weekly

Please note that this schedule is set at the organization level, not the facility level.

Click **OK** to be taken back to the main Patient Interface Schedule window.

All the schedules you created will be visible in the main window. You can 'turn them off' as needed without deleting them by unclicking the **Enabled** button on the far right of each system schedule.

The boxes, Enable Phone Service and Enable Text Message Service, require additional set-up. If you're interested in this feature, please let your project manager know so you can receive a quote for the cost.

The next tab is the **Therapist Appt** tab.

If your facility has the scheduler module, upon arriving a patient, **CONNECT** will automatically send an email to the Therapist of Record.

The **Send Message on Scheduler Arrive Patient** button in the upper left corner must be checked.

The message may be sent as an email, text/sms or phone.

Please note that text and phone services require additional set-up. If you are interested in this feature, please let your project manager know so you can receive a quote for the cost.

Patient Appointment Tab

The final tab is the **Patient Appt** tab.

If your facility has the scheduler module, you will be able to send reminder messages to your patients about their pending appointments.

Messages can be sent via email, phone or text/sms.

Please note that text and phone services require additional set-up. If you're interested in this feature, please let your project manager know so you can receive a quote for the cost.

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Homework Due Prior to Next Training: