AWV Workflow Summary

ID target patients → Send target list to Healthy Plus → Schedule patients

Patient arrives at appointment → Patient check-in → New encounter is created → Patient is roomed → Visit is completed → Encounter left in review to MD → Patient check-out

If patient is identified as a candidate for CCM, enrollment discussion occurs

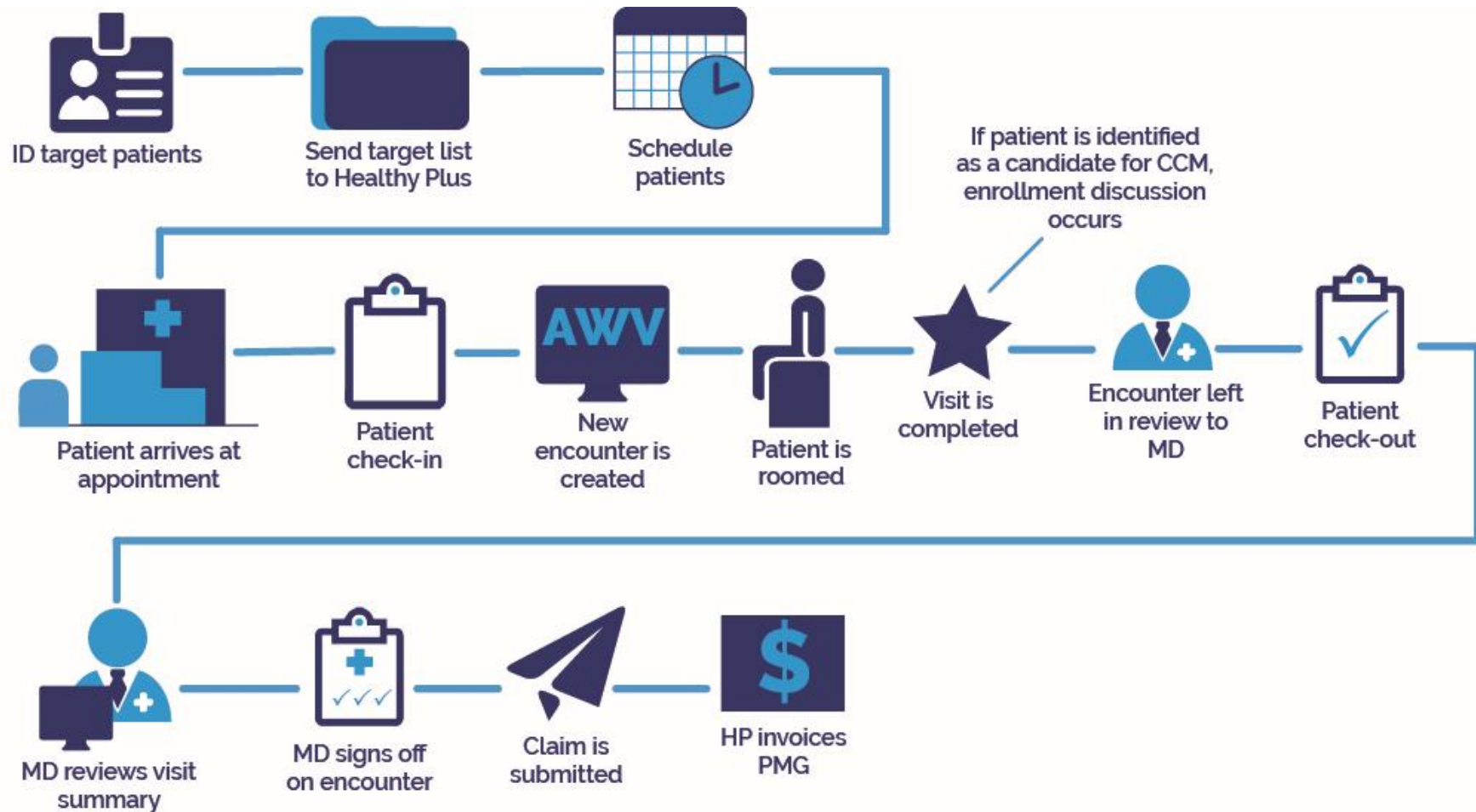MD reviews visit summary → MD signs off on encounter → Claim is submitted → HP invoices PMG

List Acquisition

- Privia Analytics to ID target patients.
- Targets to be defined based off of contract criteria and target Care Centers.
- Privia Analytics to send target contact list to HP to engage and schedule.

Questions:

Can we send Medicare Advantage Patients?
- *Yes, we can service these patients*.

How do we send these files?
- *We can either pull them from Athena (per integration) or you can place them in a secure dropbox.*

Do you expect them in a certain format?
- *We prefer them in Excel and have a standard format with designated field names.*

Can we set up an FTP site to export these directly to you to begin calling instead of collecting via email?
- *Yes, secure FTP is acceptable to us.*

What information is needed in the files?
- *It is clearly defined in the sample file attached.*

Healthy PLUS

Patient Scheduling

- The Healthy Plus call representatives will contact patients and schedule appointments.

Questions:

Where are these patients scheduled?
- Initially, in our software but due to integration it also appears on the Athena scheduled dedicated to our program.

Do our Care Centers need to create a separate Calendar in Athena?
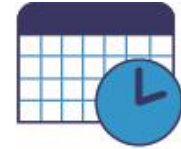*- Yes. We have it documented and we hold their hand through the process.*

How do we communicate open days/times to account for rooms?
- We ask for a set schedule for each location and we determine that up front. We can modify it as we go.

What phone # do your reps call from?
- We acquire one for each location. It is local to that area.

Healthy PLUS

Patient Scheduling

Healthy PLUS

Patient Arrives/Check-in

- Patient arrives the day of the appointment.
- Patient completes check-in at front desk.

Questions:

Is this the same check-in process as normal office visits?

- Yes.

How are HP staff notified?

- Using whatever the normal notification procedures are for the office. Usually via check-in within Athena.

What paperwork needs to be completed at check-in?

- A handout that is then given to the MA.

Is an encounter still opened in Athena at the point of check-in?

- Yes.

Does front office staff need access to HP technology?

- Not directly. They can work within Athena.

Healthy PLUS

Emmy MYATT

34yo F | 07-30-1983 | #51 | E#51

Find
Allergies
Problems
Meds
Vaccines
Vitals
Results
History
Quality

Visits and Cases

Arrange by: Date ▼

Existing Patient Appointment Booked via Blue Ocean Consulting - 1boc - VC Medical Application (open)
patient case - other
08-03-2017, patient

Existing Patient Appointment Booked via Blue Ocean Consulting - 1boc - VC Medical Application (open)
patient case - other
08-02-2017, patient

Existing Patient Appointment Booked via Blue Ocean Consulting - 1boc - VC Medical Application (open)
patient case - other
08-02-2017, patient

Existing Patient Appointment Booked via Blue Ocean Consulting - 1boc - VC Medical Application (open)
patient case - other
08-02-2017, patient

Existing Patient Appointment Booked via Blue Ocean Consulting - 1boc - VC Medical Application (open)
patient case - other
07-26-2017, patient

Medications

aspirin

Calcium 500

cholesterol (bulk)

Diabetes Health

Heartburn and Acid Reflux-Aloe

inhaler,assist devices,access

nutritional supplements

Pain Ease

prednisone

sertraline

Sleep

thyroid (pork)

warfarin

Patient Roomed

- Patient is roomed for their visit.

Questions:

Who rooms the patient?
- *Our MA.*

Is the rooming protocol different from that of the practice?
- *No, we follow standard practice.*

How long are the appointments?
- *20 minutes.*

What materials do you need in the room?
- *See attachment for room supplies.*

Healthy PLUS

Visit Complete

- AWV is completed.

Questions:

How long does it take for documentation to sync up with Athena?
- It is immediate.

How does the physician get notified to review and sign off?
- When a visit is complete, the Physician Report will drop in their clinical inbox.

What is the protocol for an issue needing escalation to the physician?
- We provide some guidelines during training (if the patient is in distress, high PHQ9 score, etc.). After that we follow whatever procedures are in place for that specific office.

Healthy PLUS

athenaNet   Calendar   Patients   Claims   Financials   Reports   Quality   Support

Emmy MYATT
34yo F | 07-30-1983 | #51 | E#51

Find

Allergies   HISTORICAL (0)   (+)

animal dander

bee pollen

egg

fire ant

latex

mold

peanut

pollen extracts

shellfish derived

venom-wasp

wheat

☐ NKDA

AWV survey allergies note: Allergy History notes
Notes from Provider

Problems

Meds

Vaccines

Vitals

Results

Visits

History

Quality

Medications

aspirin

Calcium 500

cholesterol (bulk)

Diabetes Health

Heartburn and Acid Reflux-Aloe

inhaler,assist devices,access

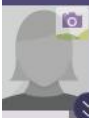nutritional supplements

Pain Ease

prednisone

sertraline

Sleep

thyroid (pork)

warfarin

---

athenaNet   Calendar   Patients   Claims   Financials   Reports   Quality   Support   👤 51   🔍   sravi8   Log out

Emmy MYATT
34yo F | 07-30-1983 | #51 | E#51

Find

Vitals   Vitals   TABLE | GRAPH   ⟨⟨

Allergies

Pulse   80 bpm
          Blue Ocean Consulting - 1boc - VC Medical
          Application (MDP Partner) | 09-14-2017

Problems

T   97.8 °F oral
          Blue Ocean Consulting - 1boc - VC Medical
          Application (MDP Partner) | 09-14-2017

Meds

BP   145 / 95
          Blue Ocean Consulting - 1boc - VC Medical
          Application (MDP Partner) | 09-14-2017

Vaccines

O2Sat   99 %
          Blue Ocean Consulting - 1boc - VC Medical
          Application (MDP Partner) | 09-14-2017

BMI   31.56
          Blue Ocean Consulting - 1boc - VC Medical
          Application (MDP Partner) | 09-14-2017

Results

Ht   5 ft 10 in
          Blue Ocean Consulting - 1boc - VC Medical
          Application (MDP Partner) | 09-14-2017

Visits

Wt   220 lbs
          Blue Ocean Consulting - 1boc - VC Medical
          Application (MDP Partner) | 09-14-2017

History

	09-07-2017	09-10-2017	09-12-2017	Today	
Pulse				• 80 bpm	80
T				• 97.8 °F oral	97.8
BP				• 145 / 95 •	145 95
O2Sat				• 99 %	99
BMI				• 31.56	31.56
Ht				• 5 ft 10 in	6 ft
Wt				• 220 lbs	220

09-07-2017 to Today

Emmy MYATT
34yo F | 07-30-1983 | #51 | E#51 | ⚠

Problems
HISTORICAL (0) | ⊕

overweight

malignant tumor of breast

malignant tumor of colon

migraine

hypertensive disorder

malignant tumor of prostate

stroke / transient ischemic attack
referral

food allergy

type 2 diabetes mellitus

Type 1 diabetes mellitus

disorder of cardiovascular system

viral hepatitis C

osteoporosis

chronic gouty arthritis

rheumatoid arthritis

arteriosclerotic vascular disease

stress

kidney disease

📄 Intellectual disability . This occurs in some people
who have CP. It is most common in people who
have total body CP, which affects the entire…

Care Episodes & Tracking
⊕

None recorded

Medications

aspirin

Calcium 500

cholesterol (bulk)

Diabetes Health

Heartburn and Acid Reflux-Aloe

inhaler,assist devices,access

nutritional supplements

Pain Ease

prednisone

sertraline

Sleep

thyroid (pork)

warfarin

Find

Allergies

Meds

Vaccines

Vitals

Results

Visits

History

Quality

athenaNet   Calendar   Patients   Claims   Financials   Reports   Quality   Support   ⚙

Emmy MYATT
34yo F | 07-30-1983 | #51 | E#51 | ⚠

Find

Allergies (11)

Problems

Meds

Vaccines

Vitals

Results

Visits

Quality

Go to ▼

Past Pregnancies   ⊕

Family History   ⊕

osteoporosis
Mother

arthritis
Father

diabetes mellitus
Father

malignant tumor of breast
Maternal Grandmother

dementia
Paternal Grandmother

disease of liver
Mother

hypertensive disorder
Mother
Father
Maternal Grandfather
Maternal Grandmother
Paternal Grandfather
Paternal Grandmother

blood coagulation disorder
Maternal Grandfather
Maternal Grandmother

malignant neoplastic disease
Paternal Grandfather

alcohol abuse
Mother

multiple environmental allergies
Father

myopic macular degeneration
Maternal Grandfather

Medications

aspirin

Calcium 500

cholesterol (bulk)

Diabetes Health

Heartburn and Acid Reflux-Aloe

inhaler,assist devices,access

nutritional supplements

Pain Ease

prednisone

sertraline

Sleep

thyroid (pork)

warfarin

Emmy MYATT
34yo F | 07-30-1983 | #51 | E#51 ❗

Go to ▼

Find

Allergies

Problems

Meds

Vaccines

Vitals

Results

Visits

Quality

Family History ⊕

Maternal Grandmother

pseudopolyposis of colon
Paternal Grandfather

migraine variant with headache
Paternal Grandmother

☐ Unknown

📄 AWV Survey indicated the following family
members had a disease. Siblings had Alcohol
Abuse, Liver Diesease, Stroke/TIA, Hypertension...

Social History ≫

Smoking status: current

Smoking - how much: 2 ppd

Tobacco-years of use: 11plusyr

Alcohol intake: occasional

Chewing tobacco: no

Exercise level: Low

Shooping activities: Needs Assistance. Money
Management: Needs Assistance2.
HousekeepingNeeds Assistance3. Drinks per day...

Surgical History ⊕

None recorded

📄 NOTE

Past Medical History ≫

None recorded

SHOW/HIDE SECTIONS

Medications

aspirin

Calcium 500

cholesterol (bulk)

Diabetes Health

Heartburn and Acid Reflux-Aloe

inhaler,assist devices,access

nutritional supplements

Pain Ease

prednisone

sertraline

Sleep

thyroid (pork)

warfarin

Patient Check-out

- Patient completes check-out process.

Questions:

Is this the same process as the normal office visit?

- Yes, the same and a follow-up visit is scheduled.

How are encounters closed and claims created?

- Once reviewed in the clinical inbox and closed, a claim is created.

Does your system export documentation to the patient's chart and leave in review to the physician?

- Yes. All info is mapped to the patient chart, and a report is left for the Physician in the clinical inbox.

What does the patient leave with?

- A printed Personalized Health Advice (report).

Healthy PLUS

Patient Check-out

Healthy PLUS

Physician Reviews

- Physician is notified of completed visit and reviews documentation.

Questions:

How is the physician notified?
- *When the report hits the clinical inbox, they get the same notification in Athena as they get now when they send a patient out for labs or other referral.*

Where is the physician notified?
- *In their clinical inbox.*

How frequently are encounters left to review?
- *Every encounter is sent for review in the clinical inbox.*

Where can they review a complete visit summary?
- *The patient information is sent to the patient chart, and a complete summary report is sent into the clinical inbox.*

Healthy PLUS

Physician Reviews

Physician Signs Off

- Physician completes review and signs off on visit summary.

Questions:

Is this as simple as signing off on the encounter?
- *Yes, it is the same procedure.*

Does this happen in Athena?
- *Yes.*

Does this have to go to a biller to create a claim and drop it?
- *Yes, just like a normal billable encounter.*

Does this happen daily, weekly, monthly?
- *The reports are sent daily in real time for review.*

Healthy PLUS

Physician Signs Off

Invoices

- HP sends invoice for work completed.

Questions:

How often are we invoiced?

- We will send billing for AWV on a bi-monthly basis. It is an invoice and supporting documentation of who has completed their AWV.

Healthy PLUS

Thank You.

Healthy PLUS