

TIPS FOR TRANSITIONING TO NEW "INSIGHTS" IN POINTCLICKCARE*

FOLLOW THIS GUIDE TO GET STARTED

THIS GUIDE IS INTENDED FOR USE
FROM OCTOBER 2023 - OCTOBER 2024

<u>What are "Insights?"</u> <ul style="list-style-type: none">• What are "Insights?"• What are the benefits of "Insights?"• Tips for information sharing	<u>2</u>
<u>What is changing with the new "Insights?"</u>	<u>3</u>
<u>How to prepare for new "Insights"</u> <ul style="list-style-type: none">• When will this happen?	<u>4</u>
<u>How to prepare for new "Insights"</u> <ul style="list-style-type: none">• How to move existing care guidelines into new "Insights"	<u>5</u>
<u>Frequently Asked Questions</u>	<u>6</u>

WHAT ARE "INSIGHTS?"

- **"Insights" are clinical and care coordination information** that is applicable across a patient's care continuum.
- **"Insights" appear in the PointClickCare network** (fka EDIE, Collective Platform, or PreManage).*
- **The "Insights" section is found on the Patient Overview page** in the web portal and in Notifications sent to emergency departments.
- **The purpose is to share a brief synopsis** on how to provide the best care for the patient.
- **"Insights" are a way for you to collaborate with healthcare providers** and influence the care a member is getting in different settings.

What are the benefits of using "Insights?"

- Content is delivered in a single, cohesive patient plan authored between facilities/organizations and providers
- Provides relevant information to ensure providers succinctly receive the most accurate info
- Increases collaboration across the PointClickCare network, particularly outside of the ED node
- Reduces multiple and conflicting content about patients in the platform

***For more information about PointClickCare network in Oregon, please [click here](#)**

Tips for information sharing

What to Include

- Information that is brief, patient specific and relevant in an ED setting
- Patient's usual presentation
- Relevant behavioral health history or treatment
- Complex medications
- Enrollment in special programs (e.g., ACT), particularly if they receive real time ED notifications and could potentially respond by phone or in-person to the ED

What NOT to include

- Generic information or phrases (e.g., "Don't give narcotics")
- Copied and pasted large care plans
- Psychotherapy notes
- Information about current substance use (Part 2) treatment programs
- Acronyms

WHAT IS CHANGING WITH "INSIGHTS?"

- Existing Care "Insights" (aka Care Guidelines, Care Histories) are only able to be edited by a single facility or organization.
- This causes problems when multiple "Insights" exist for a single patient, often with duplicate information, and causing end user confusion.

Current State

- With the new, collaborative "Insights," content can be updated by any member of the care team across multiple organizations working with the same patient.
- In this way, "Insights" will help improve patient care coordination as they move through the care continuum.

Future State

HOW TO PREPARE FOR "INSIGHTS"

When will this happen?	Oregon	Nationwide
New "Insights" will be turned on	10/9/2023	Live since early 2023
<p>Users advised to review, update, and copy over helpful content to keep into new "Insights" section</p> <p>Delete old, outdated content* <i>(content deleted from production; stored in PCC's database)</i></p>	10/9/2023 to TBD	In process; end date TBD
Final reminder to users to copy and paste content, as desired	TBD	TBD
Care Guidelines and Care Histories moved to read-only	TBD	TBD
<p>Read-only content removed from platform*</p> <p><i>(content deleted from production; stored in PCC's database)</i></p>	TBD	TBD

HOW TO PREPARE FOR "INSIGHTS"

USER ARE ADVISED TO REVIEW, UPDATE, & COPY OVER HELPFUL CONTENT TO KEEP INTO NEW "INSIGHTS"

To do this, users logged into PointClickCare, should:

- Review existing Care Guidelines/Care History authored by themselves or their team in the platform:
 - **Use the Groups page**, pull a Care Guidelines report, review content, and update outdated content.
 - **Copy and paste over** any Care Guidelines/Care History you want to keep and put them in new "Insights" section.
 - **Delete existing Care Guidelines/Care History** from Patient Page so the new content will be in the "Insights" section moving forward.
- **Familiarize your teams** with new "Insights" features.
- **Use new Tip Sheet: "Best Practices for Using Insights"**

IMPORTANT!

Your current Care Guidelines/Care History will move to read-only and eventually be removed from the network. Timeline will be coordinated with PCC's nationwide transition plan.

Be sure to review existing Care Guidelines/Care History and copy over important information you want to make available in the new "Insights" section.

FREQUENTLY ASKED QUESTIONS



1. WHAT ARE INSIGHTS?

Important clinical and care coordination information that is shared across the network by members of the patient's care team. Insights can range from purely medical information to issues pertaining to behavioral health to issues related to social determinants of health with the overarching aim of providing a holistic picture of the patient as an individual person with a specific history, specific preferences, and specific health related goals.

2. WHAT'S THE DIFFERENCE BETWEEN INSIGHTS & CARE GUIDELINES/CARE PLANS/CARE HISTORIES

Insights consists of multi-facility authored content. Whereas Care Guidelines were only able to be edited by a single facility, Insights can be updated by any member of the care team. This solves for problems experienced with Care Guidelines where multiple Care Guidelines existed for a single patient, often with duplicate information, and causing end user confusion as to which one should be primarily referred to.

3. WHO CAN CREATE/AUTHOR/UPDATE INSIGHTS?

Any user with 'patient access' can create/author/update an Insight. End user access is governed by Account Managers at the facility level itself. An organization may choose to have few or many Account Managers depending on the size of the organization. It is always recommended to have at least two Account Managers due to staff turnover, staff out sick, etc. A facility's Account Manager adds and removes end users at one's facility. End user access can be limited by the Account Manager to a 'read-only' status if the facility would like certain end users to not have edit privileges. Conversely if an organization would like to ensure certain end users are able to author and contribute content then access entitled 'patient access' can be enabled allowing these end users to write Insights, Safety and Security Events, etc.

FREQUENTLY ASKED QUESTIONS

4. WHY IS POINTCLICKCARE GOING TO USE INSIGHTS INSTEAD OF CARE GUIDELINES/CARE PLANS/CARE HISTORIES?

We're moving to Insights to better encourage and support collaboration, make it easier to find relevant information (by using topics), and provide quality insights using the technology that wasn't available while using Care Guidelines & Care Histories in order to deliver a single source for a patient's Insights.

The benefits of using Insights includes:

- Content is delivered in a single, cohesive format authored between facilities/organizations and providers
- Provides relevant information to ensure providers succinctly receive the most accurate info
- Increases collaboration across the Network

5. HOW LONG WILL I BE ABLE TO SEE CARE GUIDELINES/CARE HISTORIES?

We will continue to trigger notifications sent to visit based facilities (ED's, SNF's, and Inpatient) for 18 months since creation or last update. Inactive content will continue to persist in the portal, but will not trigger notifications. Once Care Guidelines and Care Histories are moved to a read-only status those that are still active (less than 18 months since last update or authorship) will still trigger notifications. In Oregon, inactive content will be removed from the portal, per PCC's nationwide transition plan.

6. WILL I BE ABLE TO EDIT CARE GUIDELINES/CARE PLANS I ADDED PREVIOUSLY?

Once the Insights feature is enabled, you will be able to view previous content, edit it, and delete it. Eventually, these will become read only. End-users may delete read-only Care Guidelines from their own facility if they wish. In Oregon, inactive content will be removed from the Collective portal per PCC's nationwide transition plan.



FREQUENTLY ASKED QUESTIONS

7. WILL I BE ABLE TO EDIT AN INSIGHT THAT SOMEONE ELSE WROTE?

Yes - you will be able to add additional information in an Insight that has been authored by someone else. You can also delete outdated information. This will ensure up-to-date & relevant information is available to end users. Active users are encouraged to provide their contact information in the Insights or Care Team section on the Patient Overview page.



8. WHAT IF THE ATTACHMENT TYPE(S) IN AN INSIGHT DOESN'T EXACTLY MATCH THE DOCUMENT I WANT TO UPLOAD?

Attachments in the Insights can still be used. It is likely we will add document types and other enhancements in future updates to this feature.

9. WILL INSIGHTS DISPLAY ON NOTIFICATIONS?

We will continue to trigger notifications sent to visit based facilities (ED's, SNF's, and Inpatient) for 18 months since creation or last update. Inactive content will continue to persist in the portal, but will not trigger notifications. Once Care Guidelines and Care Histories are moved to a read-only status those that are still active (less than 18 months since last update or authorship) will still trigger notifications. In Oregon, inactive content will be removed from the portal in October 2024 per PCC's nationwide transition plan.

10. WILL INSIGHTS "TRIGGER" NOTIFICATIONS IN THE ED?

Yes, active Insights trigger notifications to the ED.

11. CAN I GET INSIGHTS IN SCHEDULED REPORTS?

Scheduled Reports can include a field for whether or not an Insight exists for a patient (Y/N reporting), but not full Insights text. However, currently the Homelessness & Housing Insecurity Insight is available through Scheduled Reports. Additional topics will be added to this feature in the future.

FREQUENTLY ASKED QUESTIONS

12. CAN I GET REPORTING ON WHO AUTHORED & WHO EDITED INSIGHTS FOR INCENTIVE TRACKING?

The author contribution history is visible on the entry. However, author contributions are not available in reporting at this time.

13. CAN USERS DELETE INSIGHTS?

Yes, end users with 'patient access' privileges can edit and delete content within an Insight.

14. HOW WERE THE INSIGHTS TOPICS DETERMINED?

The PointClickCare Product team worked with our Clinical leadership and partners on the development of these specific topics.

15. WHO WILL BE ABLE TO SEE THE INSIGHTS CONTENT?

Visibility follows the same rules as Care Histories & Care Guidelines. Once a topic is turned on, roles with the permissions to view/create/delete/modify today will have the same level of access.

16. WILL WE BE ABLE TO INTEGRATE INSIGHTS WITH FHIR?

We're currently looking at where Insights fits on the FHIR roadmap, but do expect that Insights will eventually populate for facilities with SMART on FHIR integration (currently only offered for EDs with an EMR of Epic or Cerner).



17. WHAT DOES THE MIGRATION FROM CARE GUIDELINES/CARE HISTORIES TO INSIGHTS LOOK LIKE?

After gathering further feedback from customers using Insights, we will potentially move the Care Guidelines and Care Histories content to the new Insights section as read-only entries appearing beneath the Insights section. For users who wish to move Care Histories and Care Guidelines into Insights, they should copy and paste over the content.

FREQUENTLY ASKED QUESTIONS

18. IS THERE A WAY TO INCLUDE CONTACT INFORMATION FOR THE AUTHOR SO OTHER USERS CAN CONTACT THEM FOR MORE INFORMATION?

This is not something currently in scope as a structured field. If the author is part of the Care Team, their contact information can be found there. Or if the author wants to be contacted, they can leave their contact information in the content of the Insight.



19. CAN SUD PROVIDERS, USING POINTCLICKCARE'S CONSENT FUNCTIONALITY CONTRIBUTE TO INSIGHTS?

A SUD organization that is a Part 2 covered program, using our 42 CFR Part 2 compliant consent functionality, can view Insights from the Network and contribute non-collaborative Insights (which appear within the Insights section, but are not editable by viewing facilities). If the patient has not consented for their SUD provider to share information, Insights will not be seen by the rest of the care team on the Network.

20. HOW DO I FIND OUT WHAT TYPE OF ACCOUNT I HAVE OR HOW TO GET ONE?

Please contact your supervisor or your PointClickCare system administrator in your own organization for help with account access questions.

OHA, OHLC, and HIT Commons manage the EDIE Utility in Oregon which leverages the PointClickCare network. If you have any other questions or need more information please reach out to:

PointClickCare Support Team
cmt-support@pointclickcare.com

HIT Commons
HITInfo@hitcommons.org