Patient Education and Messaging Via the Health Portal

Patient education on Santovia can be accessed from the “Education” button in the treatment screen. Choose “Patient Education” from the dropdown list.

Many options are shown here – for each diagnosis on the assessment list, links to documents and videos pertaining to the diagnosis are automatically selected. I deselect all choices, then checkmark only those items I wish to send to the patient’s health portal.

In this case, a video about hypertension...
...and a document about type 2 diabetes...

...and a video about emphysema were selected to be published to the portal for the patient.

Next, click on “Publish to Portal”.

ECW then asks if you want to add text to the treatment area under “Notes” regarding the education material published to the patient's health portal.
Clicking “Yes” on the previous pop-up results in the pop-up seen here to the left. Notice that all the text is entered in one place...

...under the diagnosis that was selected when the education site was accessed. In this case, all the text was entered under the notes section of hypertension. Santovia is working on improving the formatting of this text entry.

When the patient logs into the Prima CARE health portal and chooses patient education/Santovia, their home screen shows education choices for the most recent diagnoses in the “Top picks” panel.

Unfortunately, Santovia doesn't highlight the options chosen in the progress note. Santovia selects a bunch of education material about each topic. If the patient can't find the selected material on the “Top picks” panel, clicking on “Learn about my conditions” provides access to much more educational material.
A small section of the “Learn about my conditions” page is shown here. The choices selected at the visit are printed on the patient summary page – so the patient can scroll through the choices to find the educational material selected by the provider at the visit.

Sending Messages to Patients via the Portal

Electronic messages can be created from the Hub or from a telephone encounter. From the Hub, choose “Send eMsg”.

![Electronic message interface on the portal](image)
Text can be entered into the eMessage box – and formatted with the basic tools found in word processing programs. Macros don't work here, but you can load existing templates, or make your own template in a matter of seconds.

Clicking on “Load” opens a list of the current eMessaging templates. Clicking on a template name and then hitting “OK” writes over whatever is in the eMessage with the contents of the template.
To create a template, enter text into the messaging box, click “Save As”, name it, click OK, and you have a template to use in the future.

Now I can choose the new template and click OK to enter the text into the eMessaging box.

I can also choose to delete it or rename it from this screen.

From a telephone encounter, clicking on “Messenger” opens an error message.

But clicking on “Reply to patient” (even if no message was received
from the patient) opens the messaging screen.

Here I loaded my lab results template. Notice that the subject name was pulled from the reason box of the telephone encounter. This can be changed to “Lab results” and then sent to the patient.

Note that you can review labs and then open up the Hub from the lab result itself to create an eMessage.

If the patient has the Healow app on a smartphone, he/she doesn't need to even sign in on the portal to get the message – it comes right to the phone via Healow.

To view the message on the portal, the patient signs in and then navigates to the messages tab. The message sent from the telephone encounter is at the top (I did not change the subject line). The second message was the one begun from the Hub earlier in this document.
Note that if the patient does reply to a message, it will end up in the TJ jellybean as a new web encounter. Many offices set their office manager as the default recipient of all eMessages – so the provider may not see the response unless the office manager reassigns the web encounter to the provider.

Clicking on the subject line of the message in the portal opens the message itself.

Your message can be viewed again from the telephone encounter by clicking on the icon highlighted by the red box (I think that's a package with a small green arrow pointing upward).
The message also shows up in the progress note section of the chart.

Messages sent from the Hub, however, are more difficult to find. The log is found in the side panel “Messages” tab. It defaults to all messages from all providers on the current date. The date range can be changed, and messages can be filtered by patient name and by the person to whom the message is assigned.

In the screen above, set the date range for 2 months, and filtered messages sent by me. I have been testing this function with Five Pcarettest over the past week or so – as you can see from this recent history of messages.
In **ECW 11e**, the messenger log for a particular patient can be accessed via the Hub.

This is much more convenient. The log includes the last 3 months of messages by default – this saves multiple clicks and modifications when seeking the messages to/from a particular patient.

On point with regard to **ECW 11e**:

The messenger screen LOOKS like the user can send text messages to the patient via the portal – this is NOT true. As of 9/19, Prima CARE is rolling out Luna Health to offices, which does allow texting as well as other communication methods to stay in touch with patients.

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