IBM Phytel Coordinate Frequently Asked Questions

What do I do if the phone number is wrong in Phytel Atmosphere?
With regard to demographic information like phone numbers, Phytel simply presents back the information extracted from the source system. Make updates directly in your source system.

How do patients get on the list that I've created?
- First, we start with patients who have had an appointment or billing event with <u>any</u> provider in the health system in the last 2 years, including specialists and other providers you might not see in Phytel. We'll exclude patients who have an appropriate status in your system, such as inactive, deceased, dismissed, etc.

- Then, we'll include patients assigned to primary care providers across the health system. Note: We've put a safeguard in place for those patients who are actively seeing PCPs, but aren't assigned to a PCP in the system of record. We'll infer a PCP relationship (Phytel Assigned in the Patients report) and match those patients to providers so they don't fall through the cracks.

- Finally, patients will be considered for each condition based on the following criteria:

    - ✓ Gender and age range.
    - ✓ Identification of a chronic condition (diagnosis, billing, active problem)
    - ✓ Or, for identifying patients in need of ancillary or preventive services, by the *absence* of a service or billing code.
    - ✓ Length of time since their last test, service, vitals check, etc.

    NOTE: If you still have questions about why a certain patient is on your list, check for any additional details required by a specific measure. Look up the name of the measure in the report you're using, and verify the rules in the different tabs of the Measures spreadsheet. This is a great resource located in the Reports tab.

How do I update a patient's PCP?
As always, make any updates directly in the source system for the PCP. Be sure not only to remove an assignment, but also to enter the PCP "Unknown" for any patient that is NOT your patient and you do not know the correct PCP. Our system won't "see" the update unless you make that new assignment.

What if I choose a report and there are no patients on the list?
- Check your filters. Is the Huddle report set to a day when there are no patients scheduled?
- Refresh your data by selecting "Run."
- Check to make sure you're using the correct character when entering your provider names (semicolon or comma).
  - Examples:
    1. KENNEDY; FRANKFORD; JOHNSON
   2. KENNEDY, SAMANTHA; FRANKFORD, TIM; JOHNSON, SUE

  Note that these examples will return all patients associated to any provider containing those names. In the first example, patients who have appointments with all providers with a first or last name of Kennedy, plus those with an appointment with providers with a first name or last name of Frankford, plus those with an appointment with providers with a first name or last name of Johnson. To limit the patient set, you may use a naming convention as in #2 above.

Why can't I see all of the patients scheduled for an appointment with my provider today? Or next week?
If you're using a view to get a list of patients based on appointments, make sure to select "All" groups and providers. Example: Daily Huddle Reports will need to be filtered by "All Groups" and "All Providers" in the dropdown boxes to the right of the "Saved Page Views" dropdown.
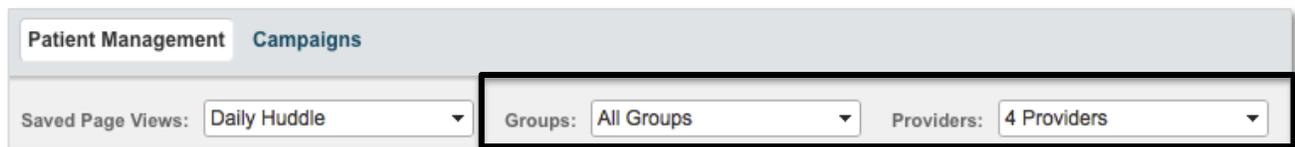
Then, if you want to filter the list of appointments to just show your providers, you'll do that in the Filtering section of the Grid. Add a field and select "Appointment Provider". You'll enter your provider name as the value.
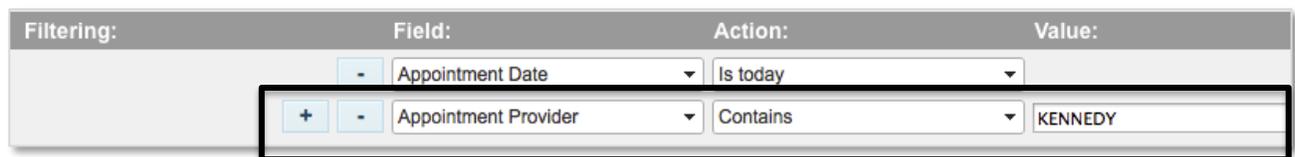

Why are Outreach protocols and Insight/Coordinate care opportunities both included in the Alerts and Recommendations?
To give you the most complete picture of a patient's clinical status.

How do I share a Coordinate view?
You must have Admin privileges to share views. If you do, select the Admin tab and then the Products page on that tab. Next select Coordinate and Share Page Views.
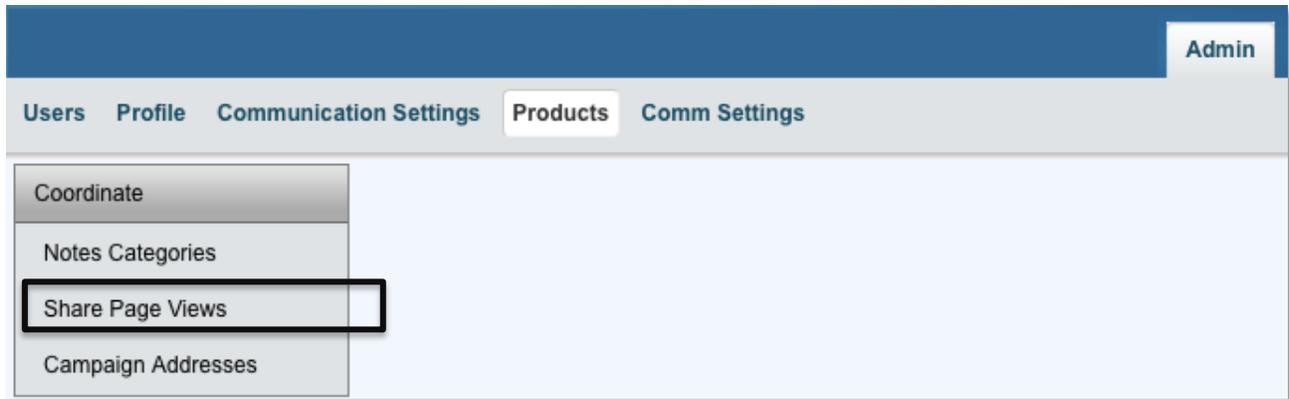
Once the page is populated, select the page view(s) you would like to share and then check the checkbox next to the name of the user(s) to share them with.

After you click on the Share Page Views button, the user(s) will need to log out of the system and back in to see the view in their Coordinate "Saved Page Views" dropdown menu.

How do I update a saved page view?
Your saved page views will always update with the most current <u>data</u> when you open them. If you want to update/change the <u>filters</u> you're using or change a filter value, expand the filters using the arrow at the right of the screen. When you've completed your changes, you can save the view with the same name or give the view a new name.

What if a new employee needs access to the system or I need to reset a password?
User management is done by key super users within your organization. Reach out to your manager for help in each of these scenarios.