Optimizing the EHR Using the KLAS EHR Experience Survey: An EHR-Agnostic Training Series
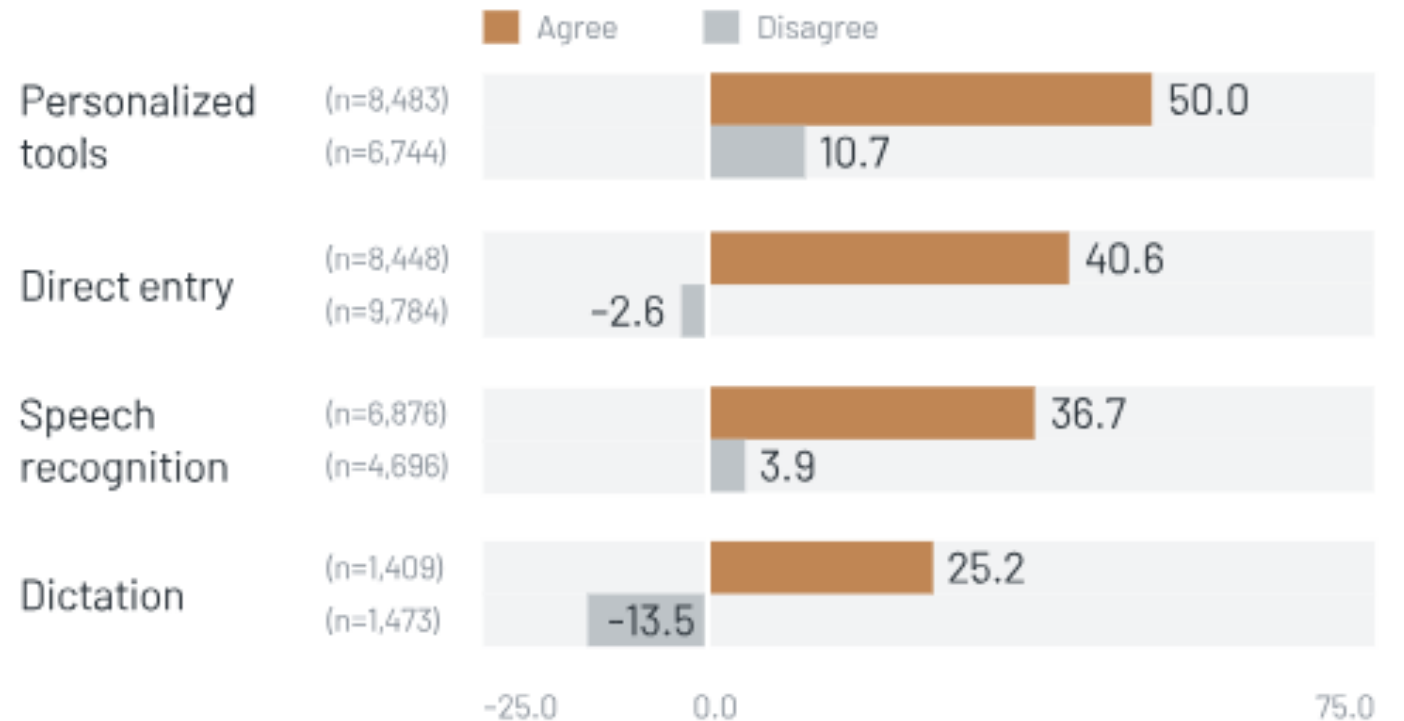
Session 3- April 17, 2024

Agenda

1. KLAS EHR Experience Survey Results- EHR Personalization Tools + Considerations When Adopting New Tools

2. KLAS Arch Collaborative Conference- EHR Training Formats + Promising Practices

3. Orlando Perez, Patricia Alisme, Shivangi Srivastava- Betances Health Center on EHR Personalization Tools

Why personalize your EHR?

Net EHR Experience Score—by Agreement That Documentation Training Was Satisfactory

Physicians only (−100 to 100 point scale)

Agree   Disagree

Personalized tools
(n=8,483) 50.0
(n=6,744) 10.7

Direct entry
(n=8,448) 40.6
(n=9,784) −2.6

Speech recognition
(n=6,876) 36.7
(n=4,696) 3.9

Dictation
(n=1,409) 25.2
(n=1,473) −13.5
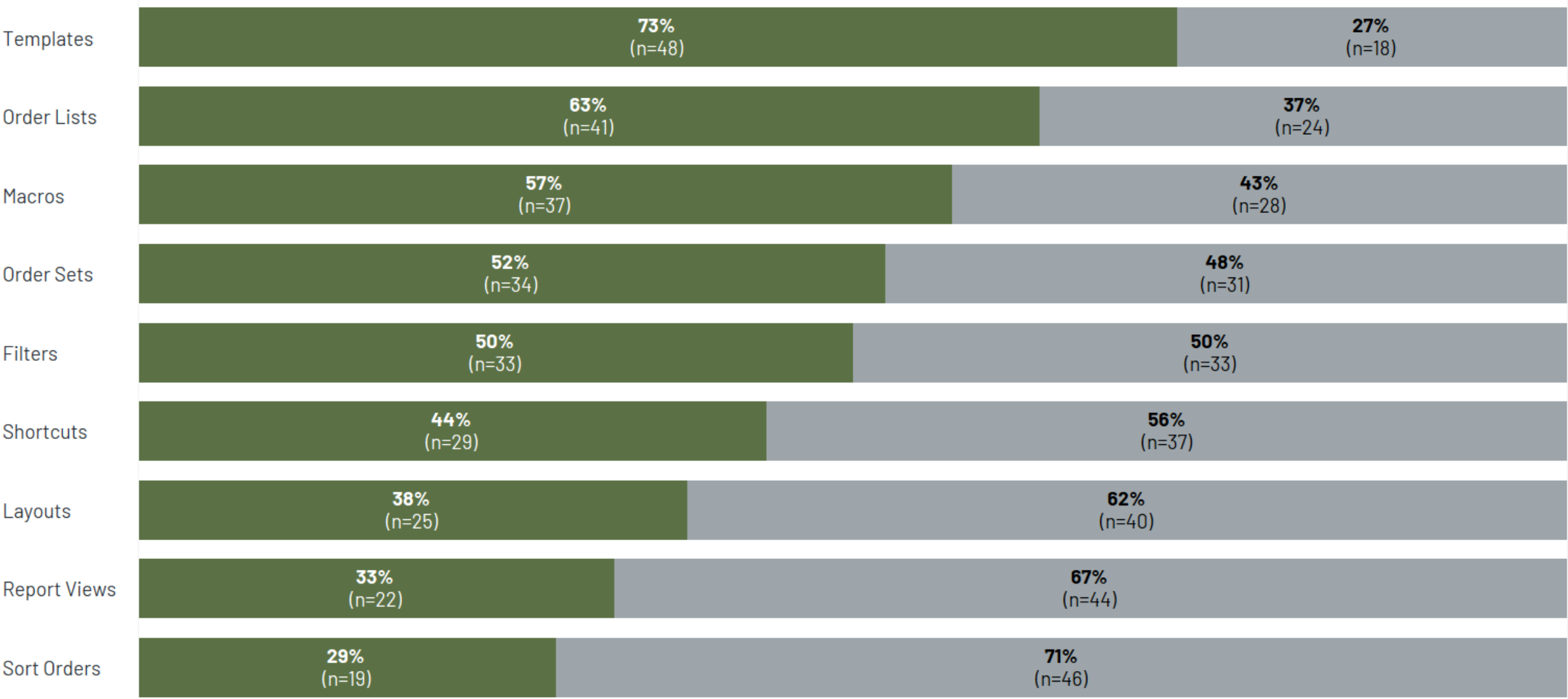
−25.0   0.0   75.0

KLAS RESEARCH

Why personalize your EHR?

- Majority of time spent on the EHR is because of documentation

- Better training + More personalization → Faster documentation, less burnout and more effective workflows

- Physicians who utilize personalized tools or speech recognition are the most likely to complete over half of their charting immediately after seeing the patient

KLAS RESEARCH

Use of EHR Personalization Tools
CHCANYS 23; physicians only

Legend: ■ Using ■ Not using

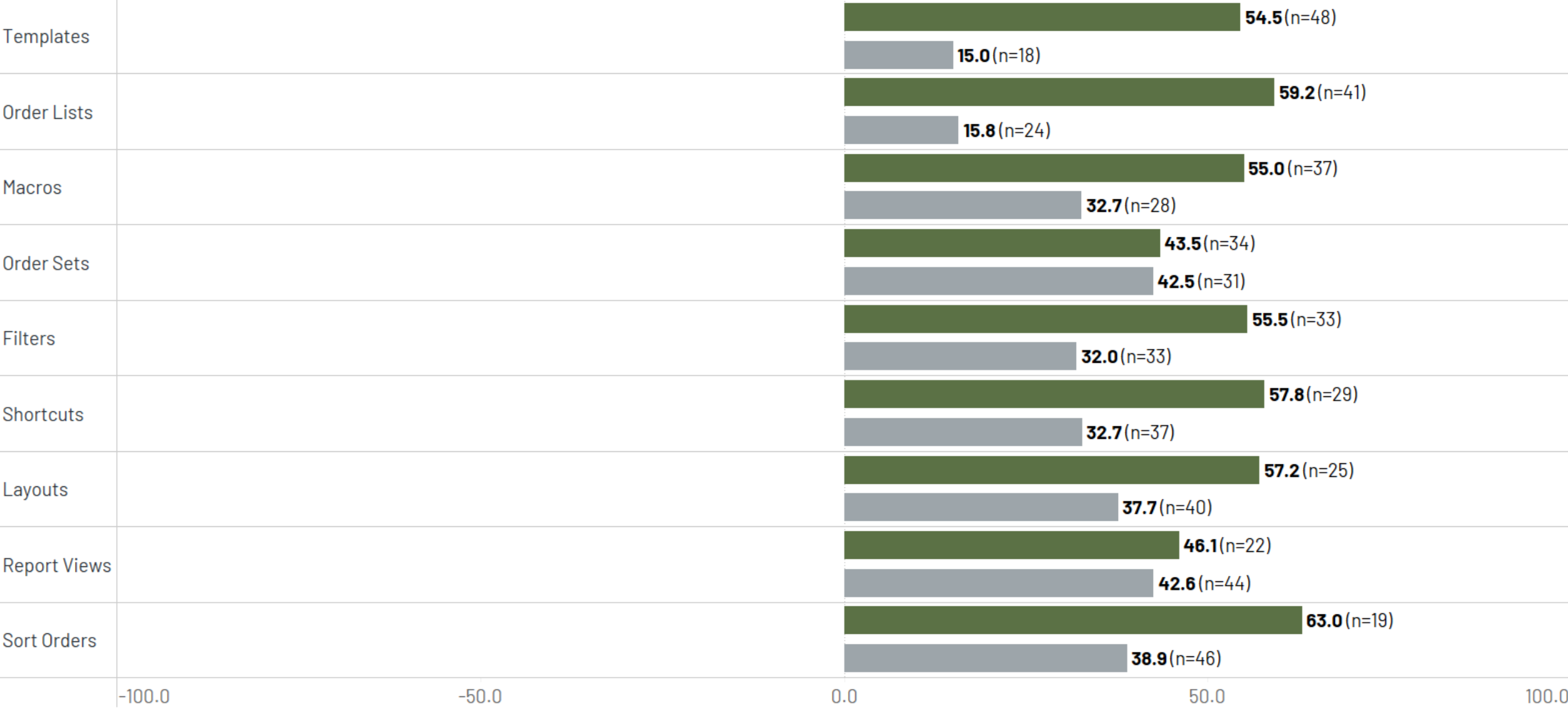| Tool	Using	Not using
Templates	73% (n=48)	27% (n=18)
Order Lists	63% (n=41)	37% (n=24)
Macros	57% (n=37)	43% (n=28)
Order Sets	52% (n=34)	48% (n=31)
Filters	50% (n=33)	50% (n=33)
Shortcuts	44% (n=29)	56% (n=37)
Layouts	38% (n=25)	62% (n=40)
Report Views	33% (n=22)	67% (n=44)
Sort Orders	29% (n=19)	71% (n=46)

0%   100%

Net EHR Experience Score—by Use of EHR Personalization Tools

CHCANYS 23; physicians only

Legend: ■ Using ■ Not using

Tool	Using	Not using
Templates	54.5 (n=48)	15.0 (n=18)
Order Lists	59.2 (n=41)	15.8 (n=24)
Macros	55.0 (n=37)	32.7 (n=28)
Order Sets	43.5 (n=34)	42.5 (n=31)
Filters	55.5 (n=33)	32.0 (n=33)
Shortcuts	57.8 (n=29)	32.7 (n=37)
Layouts	57.2 (n=25)	37.7 (n=40)
Report Views	46.1 (n=22)	42.6 (n=44)
Sort Orders	63.0 (n=19)	38.9 (n=46)

Axis: -100.0, -50.0, 0.0, 50.0, 100.0
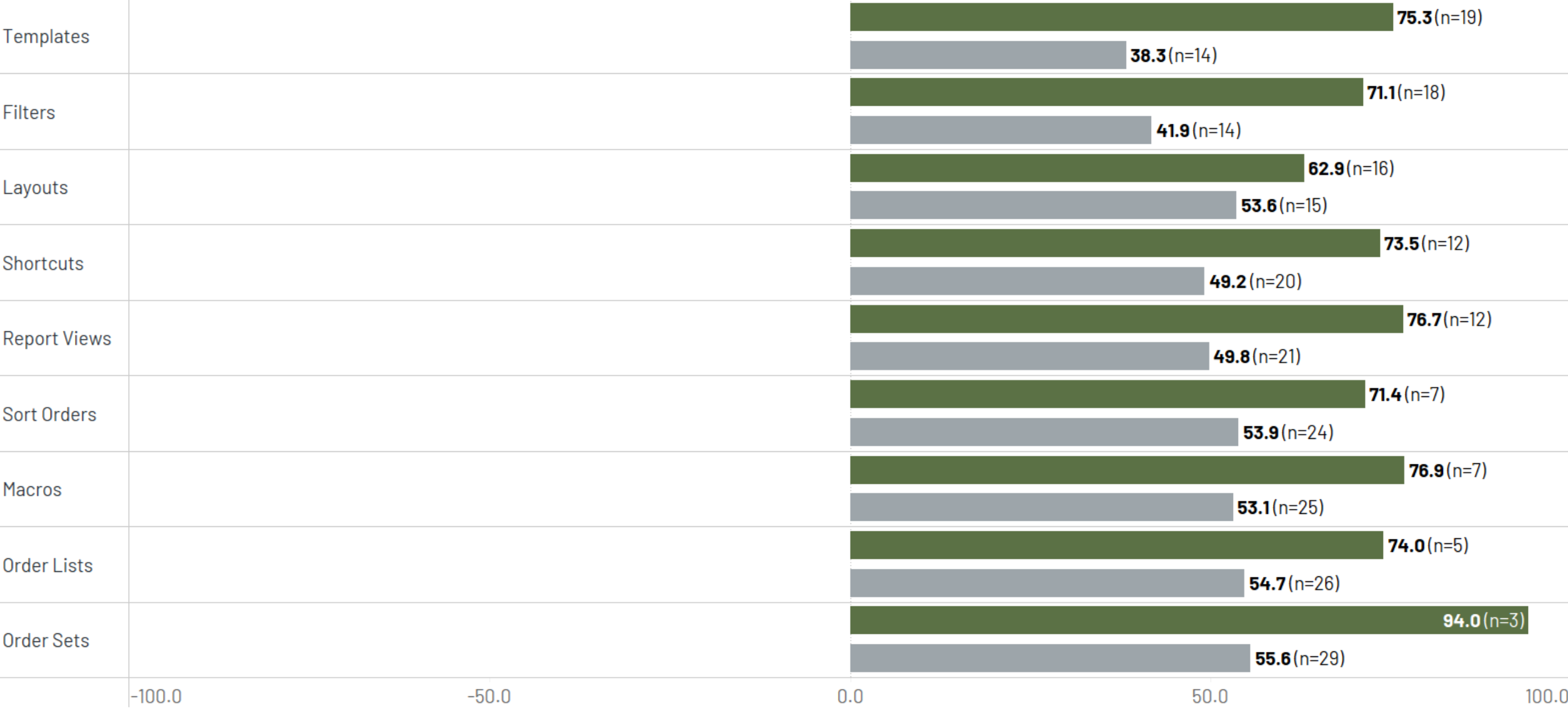
Net EHR Experience Score—by Use of EHR Personalization Tools

CHCANYS 23; allied health professionals only

Legend: Using (green), Not using (gray)

Tool	Using	Not using
Templates	75.3 (n=19)	38.3 (n=14)
Filters	71.1 (n=18)	41.9 (n=14)
Layouts	62.9 (n=16)	53.6 (n=15)
Shortcuts	73.5 (n=12)	49.2 (n=20)
Report Views	76.7 (n=12)	49.8 (n=21)
Sort Orders	71.4 (n=7)	53.9 (n=24)
Macros	76.9 (n=7)	53.1 (n=25)
Order Lists	74.0 (n=5)	54.7 (n=26)
Order Sets	94.0 (n=3)	55.6 (n=29)

Axis: -100.0   -50.0   0.0   50.0   100.0

Overall Benchmark Personalization Metrics CHCANYS 23
Included Clinical Backgrounds: **Physicians only at 178 Organizations**
Similar Organizations: **15 HCCNs**

Percentile

0 ▮▮▮ 100
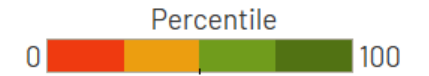
	Percent Agree	Rank: Collaborative	Rank: Similar Organizations
Using Templates	73% (n=66)	32nd Percentile	83rd Percentile
Using Macros	57% (n=65)	37th Percentile	58th Percentile
Using Order Sets	52% (n=65)	29th Percentile	75th Percentile
Using Order Lists	63% (n=65)	40th Percentile	85th Percentile
Using Report Views	33% (n=66)	36th Percentile	92nd Percentile
Using Shortcuts	44% (n=66)	72nd Percentile	82nd Percentile
Using Filters	50% (n=66)	44th Percentile	85th Percentile
Using Sort Orders	29% (n=65)	57th Percentile	77th Percentile
Using Layouts	38% (n=65)	26th Percentile	69th Percentile

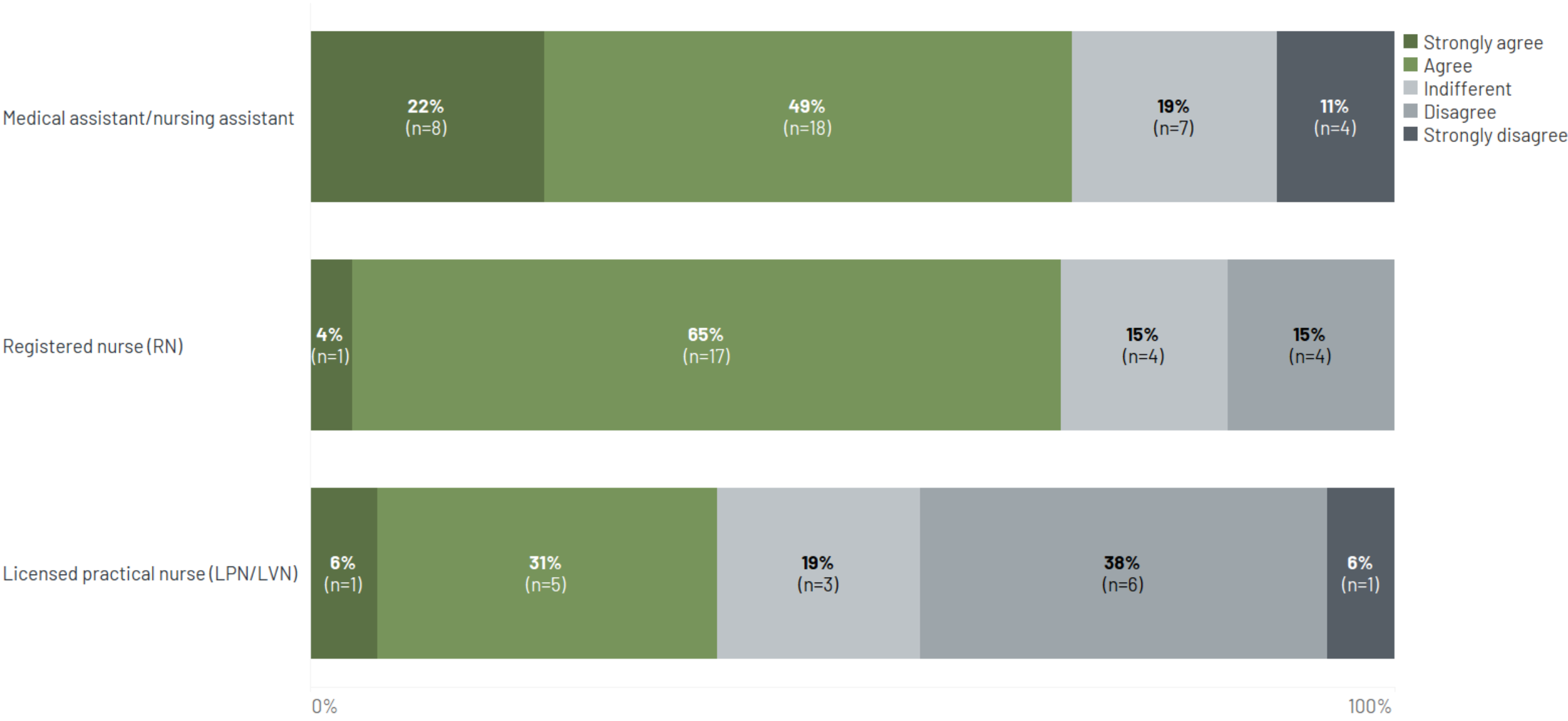# Personalization Metrics Measurement Comparison CHCANYS 23 vs. CHCANYS 22
Included Clinical Backgrounds: **Physicians only**

Difference
-10% ▮▮▮▮▮ +10%

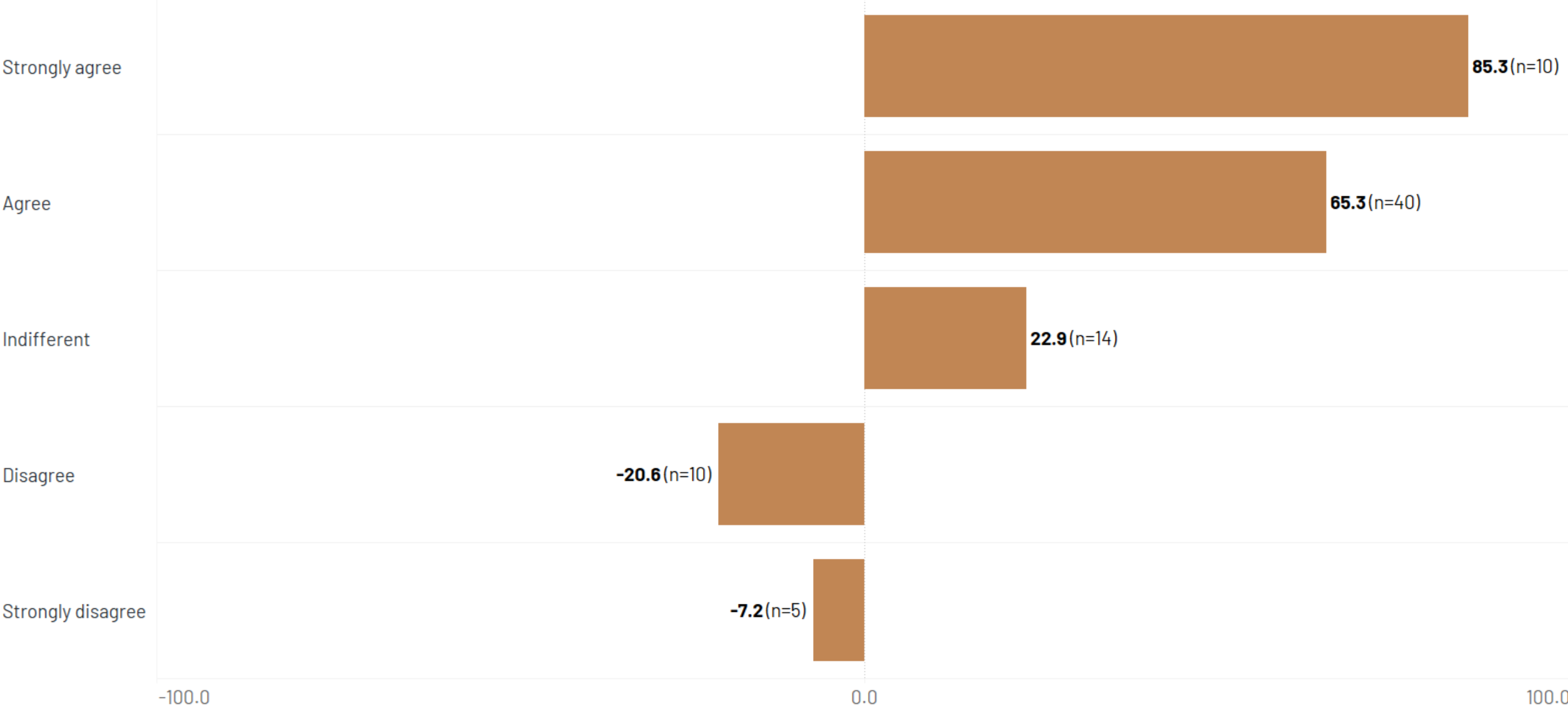|	Current Percent Agree	Previous Percent Agree	Change
Using Templates	**73%** (n=66)	**68%** (n=169)	+5%
Using Macros	**57%** (n=65)	**43%** (n=165)	+14%
Using Order Sets	**52%** (n=65)	**40%** (n=166)	+12%
Using Order Lists	**63%** (n=65)	**46%** (n=167)	+17%
Using Report Views	**33%** (n=66)	**22%** (n=167)	+11%
Using Shortcuts	**44%** (n=66)	**25%** (n=167)	+19%
Using Filters	**50%** (n=66)	**36%** (n=165)	+14%
Using Sort Orders	**29%** (n=65)	**16%** (n=165)	+13%
Using Layouts	**38%** (n=65)	**31%** (n=166)	+7%

Agreement That I Have Personalized the EHR to Best Support My Workflow

CHCANYS 23; nurses and medical assistants/nursing assistants only

Legend:
- Strongly agree
- Agree
- Indifferent
- Disagree
- Strongly disagree

Medical assistant/nursing assistant
- 22% (n=8) — Strongly agree
- 49% (n=18) — Agree
- 19% (n=7) — Indifferent
- 11% (n=4) — Strongly disagree

Registered nurse (RN)
- 4% (n=1) — Strongly agree
- 65% (n=17) — Agree
- 15% (n=4) — Indifferent
- 15% (n=4) — Disagree

Licensed practical nurse (LPN/LVN)
- 6% (n=1) — Strongly agree
- 31% (n=5) — Agree
- 19% (n=3) — Indifferent
- 38% (n=6) — Disagree
- 6% (n=1) — Strongly disagree

0% — 100%

Net EHR Experience Score—by Agreement That I Have Personalized the EHR to Best Support My Workflow

CHCANYS 23; nurses and medical assistants/nursing assistants only

Agreement	Net EHR Experience Score
Strongly agree	85.3 (n=10)
Agree	65.3 (n=40)
Indifferent	22.9 (n=14)
Disagree	-20.6 (n=10)
Strongly disagree	-7.2 (n=5)

-100.0   0.0   100.0

What To Consider When Adopting a New Personalization Tool

1. Understand Your Workflow
2. Involve Stakeholders
3. Customization Options
4. Training and Support
5. Vendor Support and Compatibility
6. Data Security and Compliance
7. Interoperability
8. Cost and ROI
9. Feedback and Iteration

COMMUNITY HEALTH CARE ASSOCIATION of New York State   chcanys.org

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Scripps Health

- Identify the workflows that need to be streamlined by tracking those with the most clicks
- Create an approval process that enables rapid implementation of changes
- Translate clicks saved into time and money saved to generate buy-in and keep clinicians and organization leaders engaged in workflow optimization

Best Practices – Scripps Health

- Shared ownership and governance
- Clinician efficiency and personalization

UCSF Health

- Provide opportunities for new Advanced Practice Providers (APP) to personalize the EHR with guidance from another provider in their specialty

- Focus on establishing optimal workflows and overall efficiency, not just high personalization rates

- Provide personalized, ongoing training for APPs

Best Practices – UCSF Health

- Extensive onboarding for new hires that includes at-the-elbow EHR training with experienced providers to accumulate SmartTools and personalize their workflow

- Initiatives within the organization address efficiency and optimization, leading to personalized solutions for providers

- Ongoing EHR training is conducted through tailored courses based on individual APPs' (Advance Practice Providers) needs, and feedback is collected to refine the program

Journal Article

Factors That Influence Clinician Experience with Electronic Health Records

Vimal Mishra, MD, MMCi, David Liebovitz, MD, Michael Quinn, PhD, Le Kang, PhD, Thomas Yackel, MD MBA, and Robert Hoyt, MD, FACP, FAMIA

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Abstract

Go to: ▸

Objectives

To report quantitative and qualitative analyses of features, functionalities, organizational, training, clinical specialties, and other factors that impact electronic health record (EHR) experience based on a survey by two large healthcare systems.

Methods

- VCU MC - 830 physicians, 750 residents and fellows, 400 advanced practice providers using Cerner
- UCM - 848 attending physicians, 1132 residents and fellows using Epic
- Used the KLAS EHR Experience Survey

>   General background
>
>   Training
>
>   EHR personalization
>
>   Satisfaction with EHR features
>
>   Satisfaction with the organization
>
>   Free text comments/ desired improvements

Personalization tools data

Questions were presents to all clinicians at VCU MC but to staff physicians, residents, fellows, NPs and PA at UCM

- 42% at VCU and 30% at UCM reported very low/no personalization
- Clinical templates were the most frequently used data input personalization tool at both centers
  - o 58% at VCU and 62% at UCM found templates useful
- Order sets not utilized by 47% at both institutions
- Over 50% at VCU did not use report views, shortcuts, filters, sorting orders or layouts; UCM ranged between 39% - 59% for this category

Net EHR experience

- VCU was 6.2 [Slightly positive]

  o Physicians was –6.2

  o Nursing was 14.92

- UCM was 19.7

  o Physicians was10.36

  o Nursing was10.19

Most Valuable Features

- Communication
  - Electronic consults, updates of patient information & discharge instructions
- E-prescribing
  - Prescribing Schedule II drugs and access to medication fill history
- Training and support
- Vendor responsiveness
  - Weekly updates and relevant tutorials
- Efficiency

Results

- Noted differences in physician and nursing EHR experience

- EHR personalization, years of practice → Impacted efficiency, quality of care and satisfaction with EHR training

- Specialties like family medicine, infectious diseases, pulmonology, endocrinology VERY low

Conclusion

- Better EHR training

- Increasing utilization of personalization tools

- Decreasing documentation burden

Health Center Spotlight:

Betances Health Center

Orlando Perez

Patricia Alisme

Shivangi Srivastava

AGENDA

1. About Us
2. EMR and Pop Health Solutions We Use
3. Challenges and Solutions
4. Q & A

ABOUT US

▶ FQHC - 2 Locations – Manhattan and Bushwick

▶ 12 Providers , 7 Specialist and 95 Staff

▶ In 2023 we served 7,377 Patients

▶ We offer full range of Primary Care and Preventative Services Including :

- ❑ Family Practice
- ❑ Pediatric Medicine
- ❑ Internal Medicine
- ❑ Women's Health
- ❑ Prenatal Care
- ❑ HIV/AIDS Care
- ❑ Dental
- ❑ Behavioral Health
- ❑ Podiatry
- ❑ Nutrition
- ❑ *Adding Vision Care (Optometry) by 2nd quarter 2024*
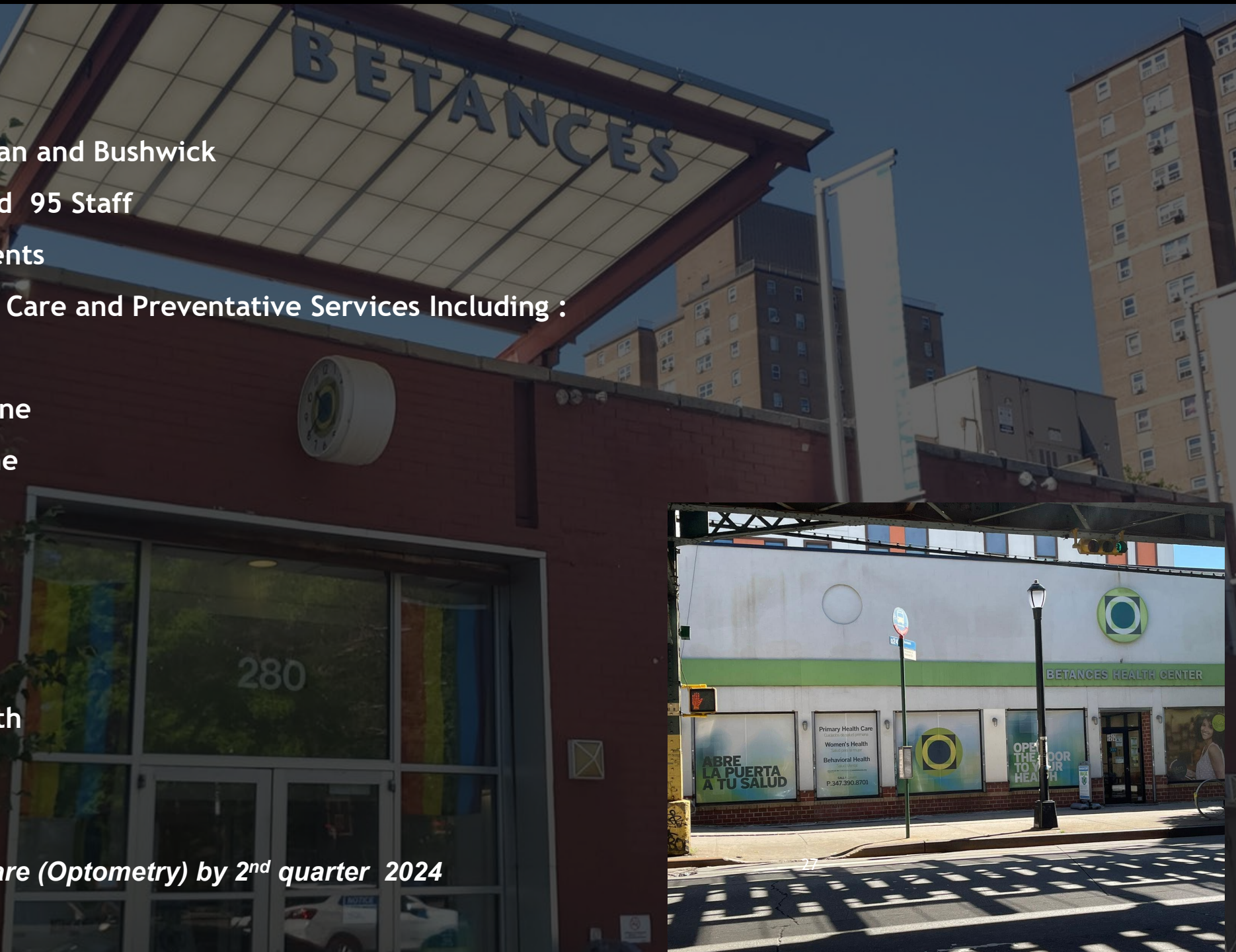
EMR & POP HEALTH SOLUTIONS WE USE

EMR AND POP HEALTH SOLUTIONS

▶ EMR: eClinicalWorks

Pop Health Solution

▶ Patient Outreach: Healow Messenger Campaigns

▶ Clinical Transcription: Scribe

▶ Care Management:

- ❑ Care Planning Module
- ❑ Chronic Care Management
- ❑ Transition Care Management

▶ Medical Home Recognition:

- ❑ PCMH Analytics Reports
- ❑ Screening Forms

▶ Reporting & Data Analysis:

- ❑ eCW Registry Reports
- ❑ Custom ebo Reports
- ❑ Healow Analytics
- ❑ eCW UDS eBO reports
- ❑ Azara DRVS

CHALLENGES

- ❑ Streamlining clinical documentation to avoid discrepancy and missed tracking opportunities because of limited community mapping options.

- ❑ Diverse documentation requirements based on the quality programs (NCQA Measures VS UDS reporting VS Payers requirements).

- ❑ Continuous Training & Education on EMR features based on frequent vendor updates/enhancements.

PCMH & UDS Use Case

1.) Identify measures/ concepts to be reported.

2.) Review with clinicians and key decision makers

3.) Complete the system setup.

4.) Build templates/ Order sets

1.) Custom workflow needs are assessed and supporting templates are created.

2.) Reports are run to determine the baseline performance.

3.) Azara reports are reviewed against the program requirements and EMR workflows.

PDSA

1.) Monthly Clinical champion meetings to review the progress.

2.) Reports are run before the meetings, and gaps are reviewed during the call.

3.) Action plans are set and reviewed during monthly provider meetings led by CMO.

1.) Team members are enrolled into webinars conducted by eCW.

2.) Clinicians and staff are provided with educational video/document repository within eCW & Azara portals.

3.) CMO does peer reviews with providers to minimize gaps.

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Monthly Population Health Team Meetings

Pediatrics

Diabetes

Hypertension

Women's Health

The power of communication: Goals of the Population Health Team meetings

Leverage the use of eCW and Azara DRVS

Workflows
Orders sets
Templates
Data Analysis

Workflow mapping and highlighting key decision points embedded with structured fields in our EMR.   Reviewing key processes within eCW

Discussing and reviewing the importance of key standardized order sets

 Analyzing and reviewing key reports from DRVS. Key information placed in eCW and then pulled from Azara DRVS.

Listen to the clinical team, present findings often and implement changes swiftly.

Question & Answers

Thank you
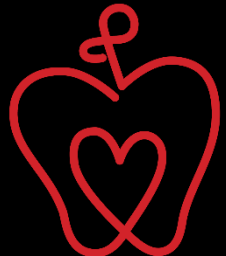
Contact Information

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sprasad@chcanys.org

Claire Heuberger, Program Manager (CHCANYS)
cheuberger@chcanys.org

Appendix

Additional KLAS EHR Experience Findings related to EHR personalization tools broken down by role: advanced practice providers and allied health professionals

Use of EHR Personalization Tools
CHCANYS 23; advanced practice providers only

Legend: ■ Using ■ Not using

Tool	Using	Not using
Templates	69% (n=27)	31% (n=12)
Order Lists	67% (n=26)	33% (n=13)
Order Sets	63% (n=24)	37% (n=14)
Macros	44% (n=17)	56% (n=22)
Layouts	36% (n=14)	64% (n=25)
Report Views	28% (n=11)	72% (n=28)
Filters	26% (n=10)	74% (n=28)
Shortcuts	21% (n=8)	79% (n=31)
Sort Orders	15% (n=6)	85% (n=33)

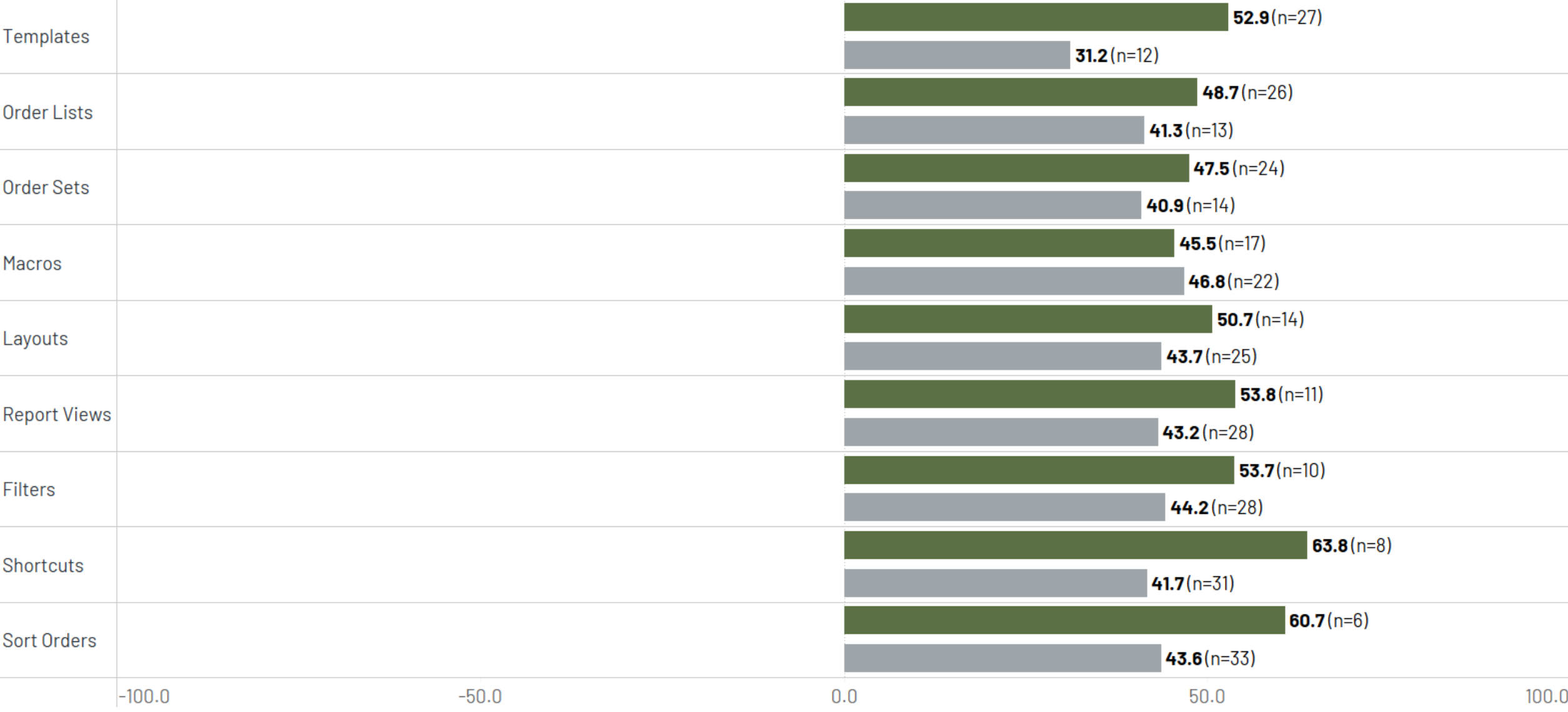0%   100%

Net EHR Experience Score—by Use of EHR Personalization Tools

CHCANYS 23; advanced practice providers only

Legend: ■ Using ■ Not using

Tool	Using	Not using
Templates	52.9 (n=27)	31.2 (n=12)
Order Lists	48.7 (n=26)	41.3 (n=13)
Order Sets	47.5 (n=24)	40.9 (n=14)
Macros	45.5 (n=17)	46.8 (n=22)
Layouts	50.7 (n=14)	43.7 (n=25)
Report Views	53.8 (n=11)	43.2 (n=28)
Filters	53.7 (n=10)	44.2 (n=28)
Shortcuts	63.8 (n=8)	41.7 (n=31)
Sort Orders	60.7 (n=6)	43.6 (n=33)

Axis: -100.0   -50.0   0.0   50.0   100.0
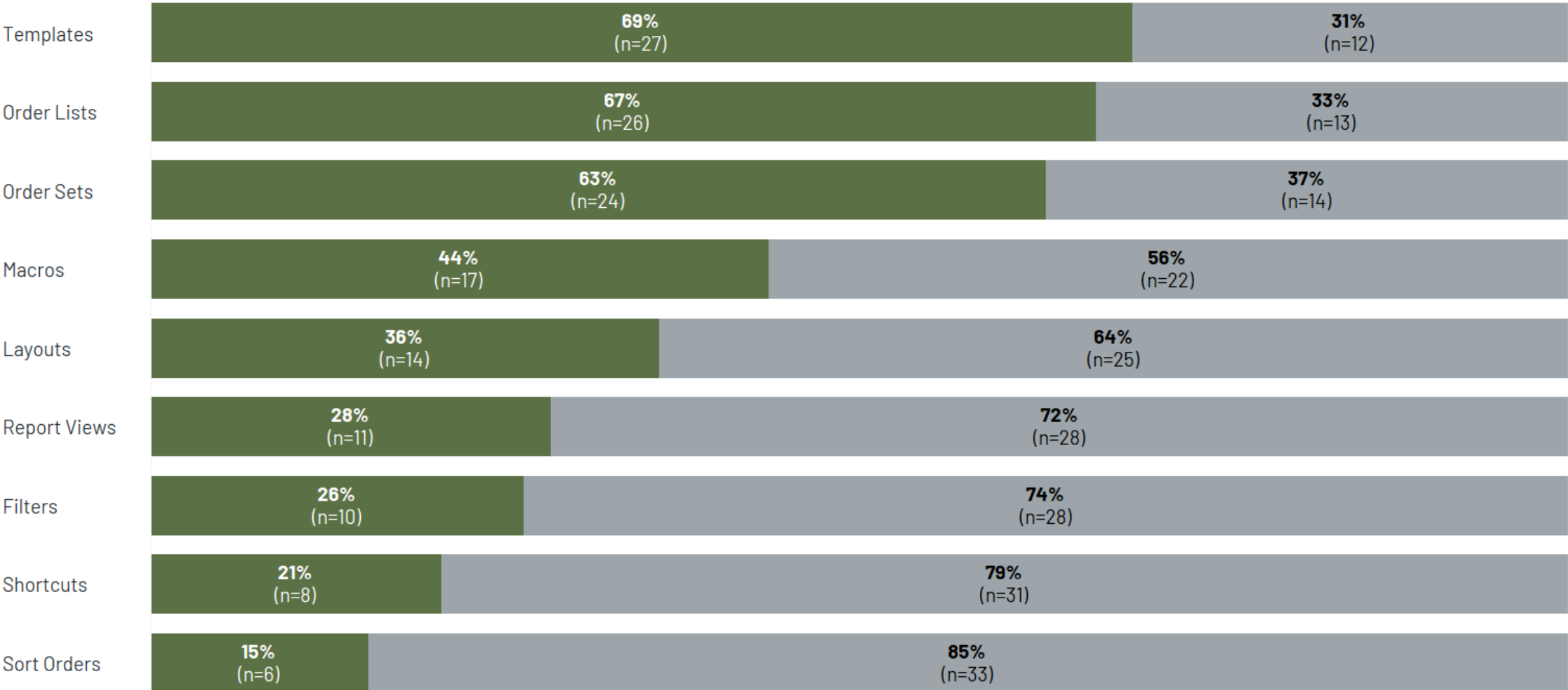
Use of EHR Personalization Tools
CHCANYS 23; allied health professionals only

■ Using
■ Not using

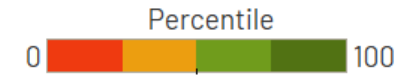| Tool	Using	Not using
Templates	58% (n=19)	42% (n=14)
Filters	56% (n=18)	44% (n=14)
Layouts	52% (n=16)	48% (n=15)
Shortcuts	38% (n=12)	63% (n=20)
Report Views	36% (n=12)	64% (n=21)
Sort Orders	23% (n=7)	77% (n=24)
Macros	22% (n=7)	78% (n=25)
Order Lists	16% (n=5)	84% (n=26)
Order Sets	9% (n=3)	91% (n=29)
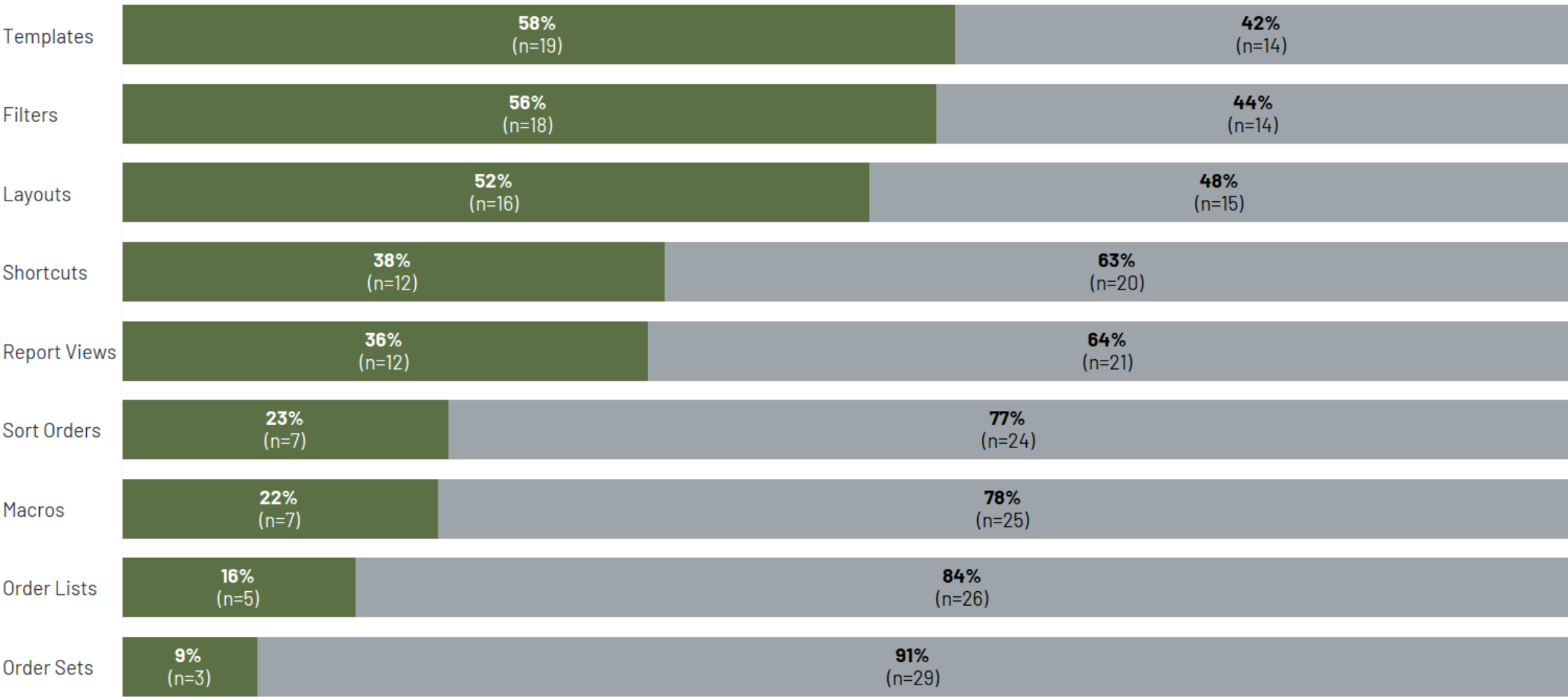
0%   100%

Overall Benchmark Personalization Metrics CHCANYS 23

Included Clinical Backgrounds: **Advanced practice providers only at 178 Organizations**
Similar Organizations: **15 HCCNs**

Percentile
0 ▮▮▮ 100

	Percent Agree	Rank: Collaborative	Rank: Similar Organizations
Using Templates	69% (n=39)	17th Percentile	36th Percentile
Using Macros	44% (n=39)	21st Percentile	27th Percentile
Using Order Sets	63% (n=38)	66th Percentile	82nd Percentile
Using Order Lists	67% (n=39)	46th Percentile	91st Percentile
Using Report Views	28% (n=39)	22nd Percentile	73rd Percentile
Using Shortcuts	21% (n=39)	15th Percentile	10th Percentile
Using Filters	26% (n=38)	8th Percentile	27th Percentile
Using Sort Orders	15% (n=39)	10th Percentile	9th Percentile
Using Layouts	36% (n=39)	21st Percentile	55th Percentile

Overall Benchmark Personalization Metrics CHCANYS 23

Included Clinical Backgrounds: **Allied health professionals only at 178 Organizations**
Similar Organizations: **15 HCCNs**
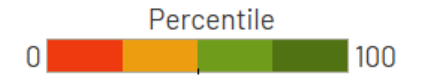
Percentile
0 ▬ 100

	Percent Agree	Rank: Collaborative	Rank: Similar Organizations
Using Templates	58% (n=33)	62nd Percentile	45th Percentile
Using Macros	22% (n=32)	64th Percentile	45th Percentile
Using Order Sets	9% (n=32)	9th Percentile	18th Percentile
Using Order Lists	16% (n=31)	12th Percentile	50th Percentile
Using Report Views	36% (n=33)	39th Percentile	83rd Percentile
Using Shortcuts	38% (n=32)	73rd Percentile	60th Percentile
Using Filters	56% (n=32)	48th Percentile	100th Percentile
Using Sort Orders	23% (n=31)	37th Percentile	83rd Percentile
Using Layouts	52% (n=31)	60th Percentile	100th Percentile

## Personalization Metrics Measurement Comparison CHCANYS 23 vs. CHCANYS 22
Included Clinical Backgrounds: **Advanced practice providers only**

Difference
-10% ▮▮▮▮▮ +10%

	Current Percent Agree	Previous Percent Agree	Change
Using Templates	69% (n=39)	70% (n=94)	-1%
Using Macros	44% (n=39)	30% (n=92)	+14%
Using Order Sets	63% (n=38)	29% (n=94)	+34%
Using Order Lists	67% (n=39)	36% (n=94)	+31%
Using Report Views	28% (n=39)	22% (n=94)	+6%
Using Shortcuts	21% (n=39)	22% (n=94)	-1%
Using Filters	26% (n=38)	29% (n=94)	-3%
Using Sort Orders	15% (n=39)	13% (n=92)	+2%
Using Layouts	36% (n=39)	28% (n=94)	+8%

Personalization Metrics Measurement Comparison CHCANYS 23 vs. CHCANYS 22
Included Clinical Backgrounds: **Allied health professionals only**

Difference
-10% [gradient bar] +10%
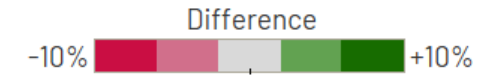
	Current Percent Agree	Previous Percent Agree	Change
Using Templates	58% (n=33)	57% (n=70)	+1%
Using Macros	22% (n=32)	13% (n=69)	+9%
Using Order Sets	9% (n=32)	13% (n=69)	−4%
Using Order Lists	16% (n=31)	13% (n=68)	+3%
Using Report Views	36% (n=33)	26% (n=69)	+10%
Using Shortcuts	38% (n=32)	20% (n=69)	+18%
Using Filters	56% (n=32)	38% (n=68)	+18%
Using Sort Orders	23% (n=31)	15% (n=68)	+8%
Using Layouts	52% (n=31)	24% (n=68)	+28%