



*Enhancing HIV Care: Preconception Counseling, Including Sexual Health,
Community of Practice (CoP)*

**Electronic Health Record (EHR) Templates in Preconception Counseling,
Including Sexual Health: Lessons from the Field**

January 24, 2024

Division of Community HIV/AIDS Programs
HIV/AIDS Bureau (HAB)

Vision: Healthy Communities, Healthy People



HIV/AIDS Bureau Vision & Mission

Vision

Optimal HIV/AIDS care and treatment for all to end the HIV epidemic in the U.S.

Mission

Provide leadership and resources to advance HIV care and treatment to improve health outcomes and reduce health disparities for people with HIV and affected communities.

Agenda



- Icebreaker
- Participant Highlights
 - University of Toledo, Katie Himich
 - Bond Community Health Center, Dr. Faye Tinson
- Round Robin Discussion
 - EHR utilization
 - SmartPhrases
 - Data life cycle and preconception counseling
- Action Steps



Learning Objectives



By the end of this learning session participants will:

- Learn how CoP participants successfully enhanced EHR templates for PCC data collection
- Learn about strategies used by their peers to overcome barriers to EHR and data collection changes
- Outline strategies to develop or enhance their own EHR templates.



Put it in the Chat!



- Which EHR system does your organization use?





ENHANCING HIV CARE

WOMEN, INFANTS, CHILDREN, AND YOUTH (WICY)

Participant Highlight: University of Toledo

Pre-conception Counseling, Including Sexual Health



Introduction



Core Team

- Katie Himich – Program Director
- Erin Durante – Lead Case Manager
- Danielle Warren – Nurse Practitioner
- Tiffany Morgillo – Quality Supervisor
- Kristin Huntsman – Clinical Supervisor
- Ginny York – Behavioral Health Manager
- Christina Williams – Billing/Claims Supervisor; Outreach

Initiative

- Expand the EMR template for preconception counseling to include reportable fields and gender inclusive opportunities

Goal

- Capture elements needed to satisfy documentation requirements for Preconception Counseling (PCC) while creating efficiencies for administration and clinical staff.



EHR Development



Epic (EHR)

- Allows for SmartLists and SmartPhrases that create efficiencies and standardization in documentation

Process

- Engage providers
- Use provider preferences to build PCC SmartPhrases
- PCC Elements added to SmartLists that were embedded in SmartPhrase
- Small Scale Test of Change

PCC Elements

- Family Planning
- Phrases Health Education and Risk Reduction



EHR Preconception Template

Pregnancy Intention

GY PCC YN ↗

Include as label

GY PCC YN

Default?	Choice
<input type="radio"/>	Now
<input type="radio"/>	in 6-12 months
<input type="radio"/>	in 1 -2 years
<input type="radio"/>	Not applicable
<input type="radio"/>	...

EHR Preconception Template

No PCC Completed

GY NO_PCC ↗

Include as label

GY NO_PCC

Connection Logic

And

None

Nor

Or

Paragraph

Sentence

Default?	Choice
<input type="checkbox"/>	Patient does not have a uterus
<input type="checkbox"/>	Client is older than 65
<input type="checkbox"/>	***

EHR PCC Template



Provider Interventions

Include as label

Connection Logic And None Nor Or Paragraph Sentence

Default?	Choice
<input type="checkbox"/>	Discussed pregnancy intention
<input type="checkbox"/>	Discussed the importance of folic acid
<input type="checkbox"/>	Reviewed medical conditions
<input type="checkbox"/>	Reviewed family medical history
<input type="checkbox"/>	Discussed the use of non-prescription medications
<input type="checkbox"/>	Reviewed immunization status
<input type="checkbox"/>	Discussed the risks of environmental toxins
<input type="checkbox"/>	Discussed the risks of alcohol, nicotine, and illegal drug use
<input type="checkbox"/>	Discussed intimate partner violence
<input type="checkbox"/>	Discussed and reviewed nutrition and physical activity



EHR PCC Reporting



Epic: Report Library

PCC Ryan White Smartphrase Usage

Chart | Encounter | Communication | Questionnaire Series

Detail List | Explore

Filter

Re-run Report

MRN	Patient	DOB	Age Sex	PCP	Encounter Date	Prov/Res	Visit Type	Department	Note Author	Note Smartphrase
-----	---------	-----	---------	-----	----------------	----------	------------	------------	-------------	------------------

Epic: Slicer Dicer or Report Explore

Population

Base: PCC Ryan White Smartphrase Usage

Slices

1 Slice by Note Smartphrase

Measures

Number of Patients

Visual Options

Bar Color: 1 Slice by Note Smartp...
Y-Axis Range: Automatic



EHR PCC Reporting



Epic: Reporting Detail

**Data is from test patients in test environment*

- SmartElement Reporting Details
- 5+ SmartList results included
- No free text

Provider/Resource	Appt Status	Time	Visit Date	Dept	Type	MRN	Patient	Thinking of Baby (PCC)?	Partner Interested in Baby (PCC)?	Pregnant Timeline (PCC)	PCC Reason Not Complete	PCC Additional Discussion
[Redacted]					Office Visit [1004]	[Redacted]		Yes	Yes	Now	Patient does not have a uterus	Discussed pregnancy intention Discussed the importance of folic acid Discussed the use of non-prescription medications
					Office Visit [1004]			Yes	Yes	Other - see note	Other - see note	Discussed the importance of folic acid Reviewed medical conditions Reviewed family medical history Discussed the use of non-prescription medications



Barriers & EHR Training Guide



- Limited IT Resources
- Lengthy Report Build Timeline
- Delays in rollout



Successes & EHR Training Guide



- Provider Engagement
- Commitment to Initiative
- Whole Team Involvement



Next Steps



- Expand to Patient Questionnaire in MyChart
- Develop Provider Checklist Specific to Gender Inclusive Practices
- Expand Educational Opportunities



A graphic showing two hands, one in a darker red and one in a lighter pink, cupping a red ribbon that forms a circle. The text is overlaid on this graphic.

ENHANCING HIV CARE

WOMEN, INFANTS, CHILDREN, AND YOUTH (WICY)

Participant Highlight: Bond Community Health

Pre-conception Counseling, Including Sexual Health



Introduction



- Bond Community Health Center, Inc (Bond CHC) is in Leon County, in the Tallahassee Metropolitan area, a college town in the Capital City of Florida. Bond has provided uninterrupted primary care and HIV services since 2001. Bond CHC has provided Part D WICY services since 2012 to low- income women, infant, children and youth (WICY) in Leon and surrounding counties in the 2B area.
- Our Ryan White Part D Program serves 138 WICY and approximately 200 non-part D patients from diverse backgrounds who are low-income and living with HIV. Over the past several months, the Ryan White Team has focused on providing preconception counseling, including sexual health to WICY in CoP Action periods 1 and 2 at each office visit. We created an Athena based preconception and sexual health template for clinical staff use to document clinical findings and patient education at every visit.
- In this presentation, we will highlight preconception counseling including sexual health, EHR template prompts, reporting, successes, barriers and next steps.





**Faye Tinson,
NP/DNP Program
Director / QI Lead**



**Damon McMillan,
HIV Specialist &
Program Medical
Director**



**Cynthia Evans, HIV
Specialist Nurse
Practitioner**



**Ajegbu Okeke, HIV
Specialty Pharmacist**



**Kyla Shillington, OB/ GYN
Nurse Practitioner**



**Anastacia Kizer, Medical
Case Manager**



**DaShaneka Wright,
Consumer Advocacy
Coordinator**



**Tamika Leland, CQM &
Data Entry Specialist**



**Reginald Hamilton,
Transportation Specialist**

Development of EHR template/prompts



- An encounter type specific to women of child-bearing age and diagnosed with HIV, was created in the EHR system (Athena). All relevant staff were given access to the encounter type. During the intake stage, staff must select the appropriate reason for visit to load the custom encounter plan.
- A clinical template was then tied to the encounter type to facilitate the capturing of required data. This template included: specific information in the discussion section, clinical orders for a point of care urine pregnancy test and an order for preconception counseling that providers use to free text details.
- Provider use of these accelerators will ensure key points of intake, counseling and discussion, clinical orders, and educational materials, are included in each visit.



Reason for visit from encounter type

The screenshot shows a software interface with a top navigation bar containing 'Review', 'HPI', 'ROS', 'PE', 'A/P', and 'Sign'. Below this is a 'Reason for Visit' dropdown menu. A red arrow labeled '1' points to the 'Reason for Visit' label. The dropdown menu is open, showing a search bar and two categories: 'Follow-Up reasons (21)' and 'All reasons (205)'. Under 'Follow-Up reasons', there are three items: 'Follow-Up: impacted cerumen of bilateral ears', 'Follow-Up: tobacco user', and 'Follow-Up: blurring of visual image'. Under 'All reasons', there are two items: 'Medicare annual wellness visit- male EP' and 'HIV Female EP'. A red arrow labeled '2' points to the 'HIV Female EP' option.


HPI section

- Appropriate selections made from HPI section

History of Present Illness + Next

Patient in for management of .

Patient is a year old female| who stated
age. Appearance , oriented x3, mood
 affect , thought process
, thought content , insight
 nt , eye contact , motor
skills wnl, m , attitude . Patient
 ntly on ARTs. Viral load been



Orders and discussions

Assessment & Plan + DIAGNOSES & ORDERS Sign Orders (2)

Prescription drug monitoring report
Narcotics 000 Overdose 000 Sedatives 000 Stimulants 000
Viewed by cevans76 on 04/25/2022

human immunodeficiency virus infection
continue regimen, check labs to r/o pregnancy

Orders → pregnancy test, urine
preconceptional counseling



Point of Care Urine Pregnancy Test

Assessment & Plan + DIAGNOSES & ORDERS Sign Orders (2) Next

human immunodeficiency virus infection Active Problem + ×

continue regimen, check labs to r/o pregnancy

pregnancy test, urine DECLINE ×

Point of care Send out

Patient access to results Do not immediately publish results PRINT




[VIEW MORE](#)

Results Discussed with patient

HCG

Standing order

Specimen External Lab Office Home Add-On



Preconceptual Counseling

Assessment & Plan (+) DIAGNOSES & ORDERS

Sign Orders (2)

Next

human immunodeficiency virus infection

Active Problem (+) (x)

continue regimen, check labs to r/o pregnancy

pregnancy test, urine

preconceptual counseling

DECLINE | (x)

(Source: Custom)

Discussed with patient

Note to patient

Notify provider of pregnancy intentions prior to attempting to conceive. Use condoms during each sexual encounter. Report any changes in menstrual cycle to provider immediately. Discussed options for contraceptives. Discussed risk factors for complications should pregnancy occur.



Internal note

PRINT

VIEW MORE



Sexual Health Counseling

Assessment & Plan (+) DIAGNOSES & ORDERS

Sign Orders (3)

Ne:

Prescription drug monitoring report

Narcotics 000 Overdose 000 Sedatives 000 Stimulants 000

Viewed by cevans76 on 04/25/2022



HIV screening



HIV testing completed, HIV counseling completed, results reviewed

HIV (1+2) differentiation, rapid immunoassay, serum



sexually transmitted disease education

sexually transmitted infection education

HIV Screening Orders

Assessment & Plan + DIAGNOSES & ORDERS

Sign Orders (3)

Next

HIV screening



HIV testing completed, HIV counseling completed, results reviewed

HIV (1+2) differentiation, rapid immunoassay, serum



sexually transmitted disease education

(Source: Custom)

DECLINE | X

Discussed with patient

Handout

[View Handout](#)

Note to patient

Internal note

PRINT

[VIEW MORE](#)










Patient Education Handouts

1 / 2 | - 100% + | [Download] [Share]



(Page 1 is in English, Page 2 is in Spanish) October 2022

HIV 101

Without treatment, HIV (human immunodeficiency virus) can make a person very sick and even cause death. Learning the basics about HIV can keep you healthy and prevent transmission.

HIV CAN BE TRANSMITTED BY	HIV IS NOT TRANSMITTED BY
 <p>Sexual Contact</p>  <p>Sharing Needles to Inject Drugs</p>  <p>During Pregnancy, Birth, or Breast/Chestfeeding</p>	 <p>Air or Water</p>  <p>Saliva, Sweat, Tears, or Closed-Mouth Kissing</p>  <p>Insects or Pets</p>  <p>Sharing Toilets, Food, or Drinks</p>

PROTECT YOURSELF FROM HIV

- Get tested at least once or more often if you have certain risk factors. 
- If you engage in behaviors that may increase your chances of getting HIV, ask  PrEP.



Patient Education Handout cont.

(Page 1 is in English, Page 2 is in Spanish)

October 2022

SAFER SEX 101 FOR HIV

Some types of sex are riskier than others for getting or transmitting HIV. Here's how to reduce your chance of getting or transmitting HIV through sex.

UNDERSTAND THE RISKS

- **Anal sex** is when the penis is put inside the anus, and it is the **riskiest type of sex** for getting or transmitting HIV. Being the **bottom** or having your partner's penis inside you is **much riskier** than being the **top** or putting your penis inside your partner.
- **Vaginal sex** is when the penis is put inside the vagina. **Either partner can get HIV during vaginal sex**, though it isn't as risky as anal sex.
- **Oral sex** is when the mouth touches the penis, vagina, or anus. There is **little to no risk** of getting or transmitting HIV from oral sex.
- You can't get or transmit HIV from sexual **activities that don't involve contact with body fluids** (e.g., touching).



The only way to know your HIV status is to get tested. Knowing your status can give you important information and help you make good decisions to prevent getting or transmitting HIV.

REDUCE YOUR RISK

Discussions



Discussion Notes

Lab results reviewed

Reinforced safe sex practices at all times

Made aware of the Florida law to disclose HIV status with all sex partners

Counseled on options to reduce the risk of transmitting HIV. Counseled on the availability of PrEP therapy for HIV negative persons

Counseled on the importance of taking ARTs regularly and the same time each day to decrease the risk for resistance and to achieve an undetectable viral load.

Counseled on the importance of using condoms to prevent STD transmitted diseases, like chlamydia or gonorrhea.

Discussed current and future desires and plans to have children with your partner and primary care providers.

Discussed contraceptive options available for prevention of pregnancy and effects of HIV and ARTs on pregnancy course and outcomes.

Reporting PCC with Athena



An Excel spread sheet report is generated through Athena by requesting any clinical encounter with the below criteria:

- Women aged 13 to 50 years
- Diagnosis code of B20 and Z21
- Example: Select the report run time such as the 15th of each month to capture encounter data from the December 1, 2023 - December 31, 2023.



Reporting PCC with Athena



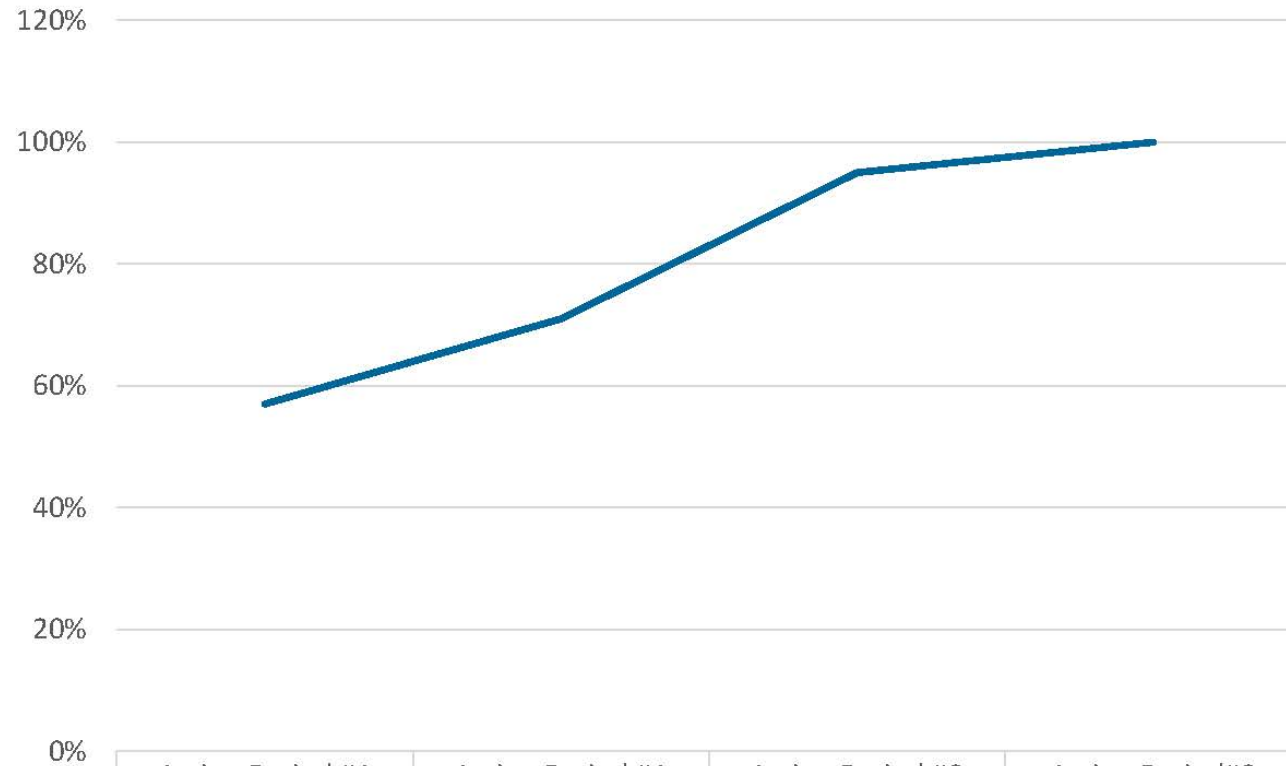
- The Excel spread sheet includes:
 - Some demographics
 - Staff title
 - Preconception Counseling date
 - Pregnancy test date and results
 - Chart review date
 - Notes
- A chart review was completed for each clinical encounter that met the criteria to confirm documentation of preconception and sexual health counseling.



Action Period #2 Data & Progress



PDSA Cycle: Study Preconception Counseling and Sexual Health



	Action Period #1	Action Period #1	Action Period #2	Action Period#2
Preconception Counseling and Sexual Health	57%	71%	95%	100%
Total Patients	12/21	15/21	20/21	21/21



Barriers



- Patient missing their scheduled appointment
- Relocation to another city or state
- Incarceration
- Some women are reluctant to be screened for cervical cancer screening and this is a barrier to providing preconception and sexual health counseling.
- Providers and key staff must select the appropriate reason for visit in order for the template to load.
- The menstrual history must be manually entered in the social history section and staff may not complete/providers may not review information.
- Patients who have physical limitations may need to request Dial-A-ride transportation prior to their scheduled appointment and may have a long wait time to return home.



Successes



- Developing the preconception counseling template will assure that key points are addressed at the visit, and it will maximize provider time.
- Ryan White Case managers are familiar with the templates, and use them for PCC, including sexual health counseling.
- Providers and key staff have been trained in the use of these templates and we have not identified any problems using the templates. They are receptive to using the templates.
- During chart review we identified women aged 50 with high-risk sexual behavior which prompted us to raise the age to 50 years for PCC including sexual health.
- We met our goal for PCC for Action Period 1 & 2 using Athena to run reports to confirm 100% of patients aged 13 to 50 who met the criteria and had an office visit received preconception counseling at the visit from staff using the preconception counseling template including sexual health counseling by February 1, 2024.



Next Steps & Q-and-A



- Review barriers that were identified in Action Periods 1 & 2 and develop a solution or work around.
- Measure efficacy of preconception counseling education by utilizing a printed patient survey. Once the patient has been seen the provider, this survey will be delivered by clinical staff.
- Continue monitoring and tracking the use of the PCC templates and make changes as needed.
- Discuss the feasibility of using the BeSafe or other model for PCC including sexual health education for WICY.
- Develop a policy and procedure for preconception counseling including sexual health.





**Bond
Mobile Unit**



**Bond Community
Health Center, Inc.**



**1720 South Gadsden Street
Tallahassee, Florida 32301**

**Bond Specialty
Care and Wellness**



Bond on Magnolia



Questions





Round Robin Discussion

Adrian Bishop, Director of eHealth and Organizational Development
Megan Williams, MPH, RN, Senior Consultant II





Round Robin Discussion Topics



- EHR utilization
- SmartPhrases
- Data Life Cycle and Preconception Counseling (PCC)



Action Steps



- Confirm with your EHR provider that your templates and prompts are being used to the highest level.
- Evaluate whether your current set of templates and prompts reflects the workflow you would like to have or have tried to change through your PDSA project.
- Review how the data cycle can be utilized in your organization.
- What action steps are **YOU** going to take? Please send an answer in the chat to this question:
 - How can your organization incorporate EHR prompts and templates?
 - What can you do differently?



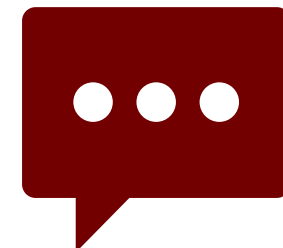
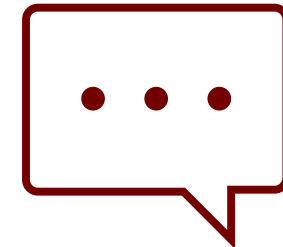
TA Session - Satisfaction Poll

How satisfied were you with the information presented in this TA Session?

- Very Satisfied
- Satisfied
- Somewhat Satisfied
- Dissatisfied
- Very Dissatisfied

I expect to use the information presented during this TA Session to enhance the care provided to women, infants, children, and youth served by our organization.

- Strongly Agree
- Agree
- Somewhat Agree
- Disagree
- Strongly Disagree





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