



Appendix 2.4

Documentation Electronic Health Record (EHR) Features

Below are suggested electronic health record (EHR) features to include in your disability status and accommodation needs build. These recommendations are informed by learnings from health systems across the country actively implementing documentation of disability status and accommodation needs in their EHRs.

Disability Field and Accommodation Needs Field Requirements

- For both Disability and Accommodation fields
 - Timestamped for when last entered/updated
 - Multiple disability types and accommodation needs can be selected
 - Once completed by anyone (see next section for options of people), previous values/information carried forward across systems/encounters
 - If new disability/accommodations are identified during verification by anyone (see next section for option of people), the new information is now the “default/baseline” information that would then be verified in subsequent visits (this is independent on who entered the information)
 - If a patient’s responses are not verified, then their original disability/accommodations remain
 - Appears in Storyboard
 - “Alert” within the Banner or Sideboard. The staff/clinician can click and hover on the disability and the disability types and accommodation needs appear
 - Lives in demographics or personal information
 - Identical fields for companion
- Accommodation field
 - Accommodation needs will need to be a drop-down.
 - All accommodation options are available to all patients
 - For patients with an identified accommodation need, prompt study team to record whether the accommodation(s) was used, if not, why it was not (including patient decline). (Note: For the inpatient setting, this will likely only occur once at the beginning of the patient’s stay.)
 - Can be completed at the beginning or end of an encounter
 - Can be completed by Medical Assistant, clinician, or another clinic staff member

Functions by Role

- Registration or Scheduling Staff Requirements
 - New patients: need a prompt to ask about disability status
 - New patients: need a user-friendly form to ask disability status questions and record answers
 - New patients: need a prompt to ask about accommodation needs based on reported disabilities
 - New patients: need a user-friendly form to ask accommodation needs questions and record answers

- Return patients: need a prompt to verify, update disability status, or complete if field is empty
 - User-friendly form, same as for new patients
- Return patients: need a prompt to verify or update accommodation needs
 - User-friendly form, same as for new patients
- Patients and Proxies Requirements
 - Via patient portal: need the ability to enter or verify disabilities anytime
 - Via patient portal: need the ability to enter or verify accommodation needs anytime
 - Perform both activities via web-based and mobile patient portal applications
 - Prompt during e-check to enter or verify disability
 - Prompt during e-check to enter or verify accommodation needs
 - Via patient kiosks need ability to enter or verify disabilities anytime
 - Via patient kiosks need ability to enter, verify accommodation needs anytime
- Medical Assistants, Rooming Registered Nurses, Front Desk Staff
 - New patients: need a prompt to ask about disabilities
 - New patients: need a user-friendly form to ask disability status questions and record answers
 - New patients: need a prompt to ask about accommodation needs based on reported disabilities
 - New patients: need a user-friendly form to ask accommodation needs questions and record answers
 - Return patients: need a prompt to verify, update disability status, or complete if field is empty
 - User-friendly form, same as for new patients
 - Return patients: need a prompt to verify or update accommodation needs based on disabilities
 - User-friendly form, same as for new patients
 - Run templated report to identify upcoming scheduled patients' accommodation needs
- Clinicians or Care Teams
 - Can edit the disability fields
 - Can edit the accommodation fields

Auditing and Reporting for Operations, Quality Improvement, and to Support Research

Discrete data elements

- Included item on Daily Activity Report (DAR) or other similar reporting for staff to plan for patient accommodation needs
- Data to support reporting of process
 - #/% events asked, verified
 - Includes who entered the information
 - #/% accommodations provided
 - Includes the accommodations provided
 - Includes reason why accommodation was not provided
 - Clinic (Epic department) the patient was scheduled in

- Should be templated reports
- Data to support reporting of disability accommodation needs by geographic region, by practice, etc.
 - Need to be able to pull at one point of time if a patient had a disability during that encounter (note: it should be the reported disability status/accommodation need during the date range, which may be different from patients' current status and needs)
 - Needs to be prospective and retrospective