Housekeeping

- This session will be recorded.

- Video will be posted on CIN website within a week. www.chcf.org/cin

- To ask a question:
  - Logistical questions: Use CHAT to the Host
  - Questions for Speakers : Use CHAT to ALL

- Survey: Please look for quick online survey to let us know what you think.

Today's Speaker

Jim Meyers

DrPH, MHA, LFACHE

Patient Portal Optimization Coach

Independent Health Consultant

jimmeyersdrph@gmail.com

Top 10 Ideas
for
Optimizing Use of Your
Patient Portal

Jim Meyers, DrPH

Patient Portal Optimization Coach
jimmeyersdrph@gmail.com
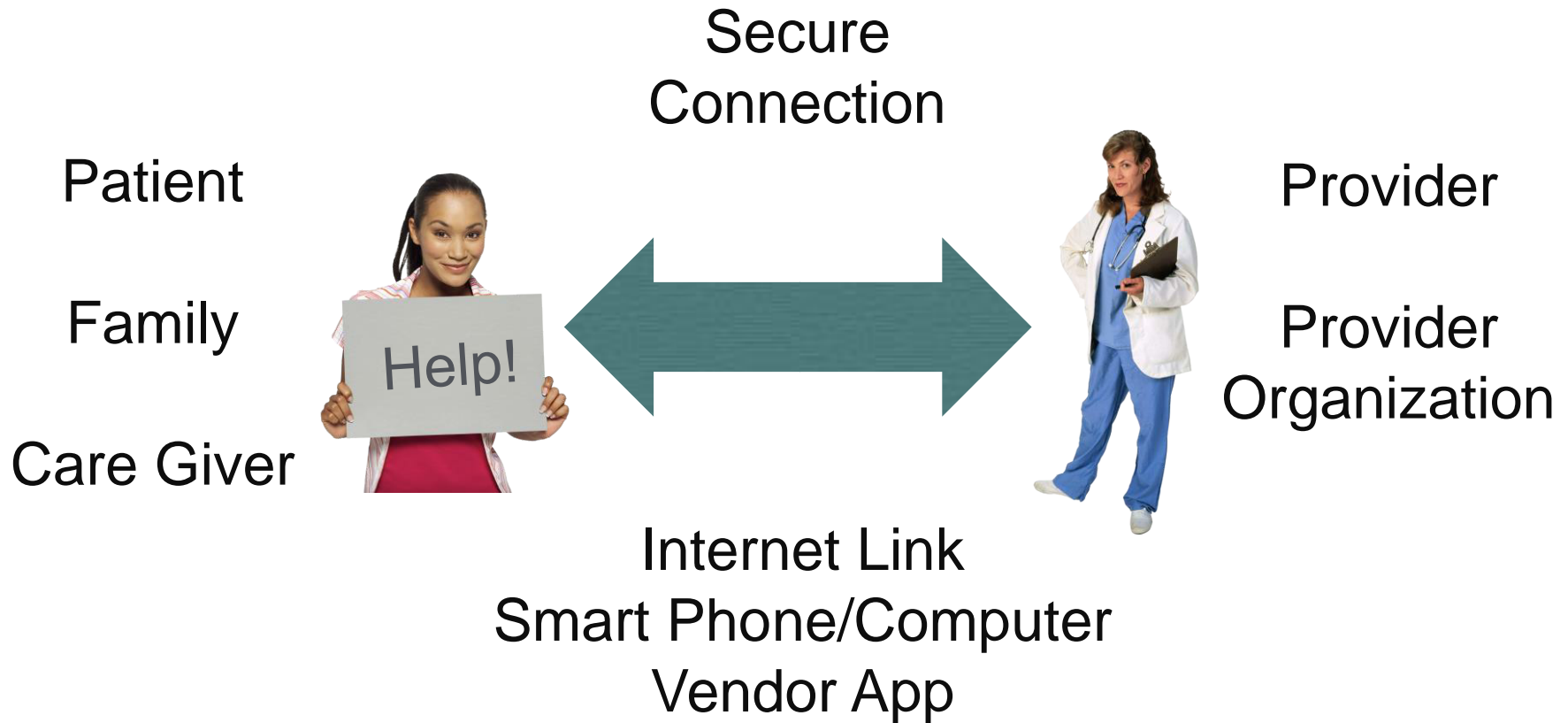
Learning Objectives

Idea-Sharing Community

Portal Basics

Top Ten Optimization Ideas

The Future

Survey Question

Patient Portal Basics

What is a Patient Portal?

Secure
Connection

Patient

Family

Help!

Care Giver

Provider

Provider
Organization

Internet Link
Smart Phone/Computer
Vendor App

National Trends

Drivers

- ❑ **Meaningful Use**
  - Electronic access to health records

- ❑ **Patient Centered Medical Home**
  - Patient -centered health IT and analytic tools

- ❑ **Health Reform**
  - Strategic differentiator for patient engagement

Benefits

- ❑ **Patients:**
  - Secure messaging
  - View Lab Results
  - Manage Appointments
  - Refill Prescriptions
  - View/Download Record
  - Complete Forms
  - Pay Bills

- ❑ **Clinics/Providers:**
  - Administrative efficiencies (less calls)
  - Push routine tasks to care team
  - More time for critical patients

Barriers

- ❑ **Patients:**
  - "Digital Divide"
  - Literacy
  - Language
  - Privacy concerns

- ❑ **Providers:**
  - Potential for added work
  - Lack of reimbursement
  - Inappropriate use by patients
  - Liability for security breaches

Elements of Successful Planning

- Organizational Portal Strategy
- Patient Portal Team
- Launch/Re-launch/ Optimization Plan
- Interoperability
- Enrollment/Password Reset
- Portal Features/Functions
- Support Plan
- Training Plan

- Patient Engagement and Feedback
- Internal Feedback
- Marketing Planning
- Workflows
- Risk Mitigation
- Minor Users
- Mobile Features and Functions
- Non-English Language Options

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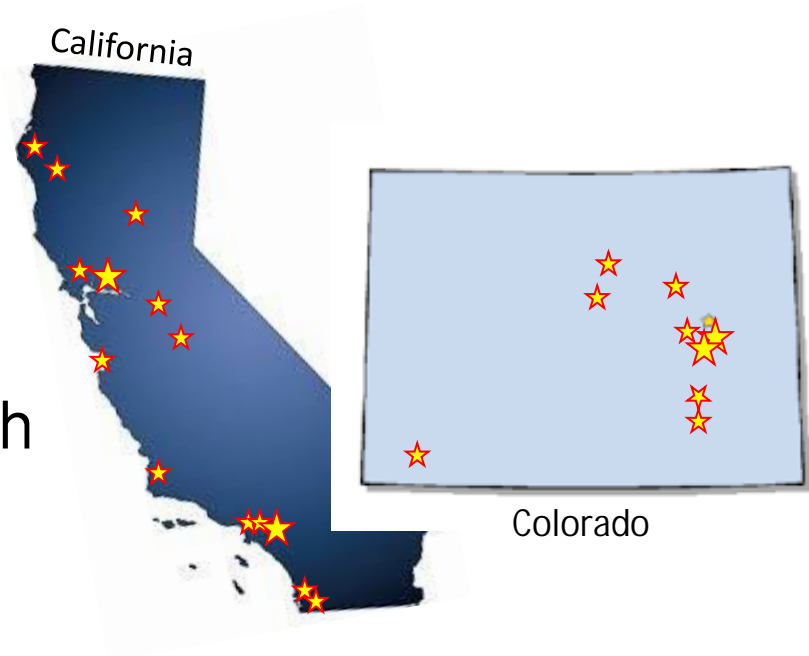- Non-English Language Options

Idea-Sharing Community

Patient Portal Idea-Sharing Community

- Coaching and Idea Sharing on Patient Portals Since 2010
- 25+ Organizations
- California and Colorado
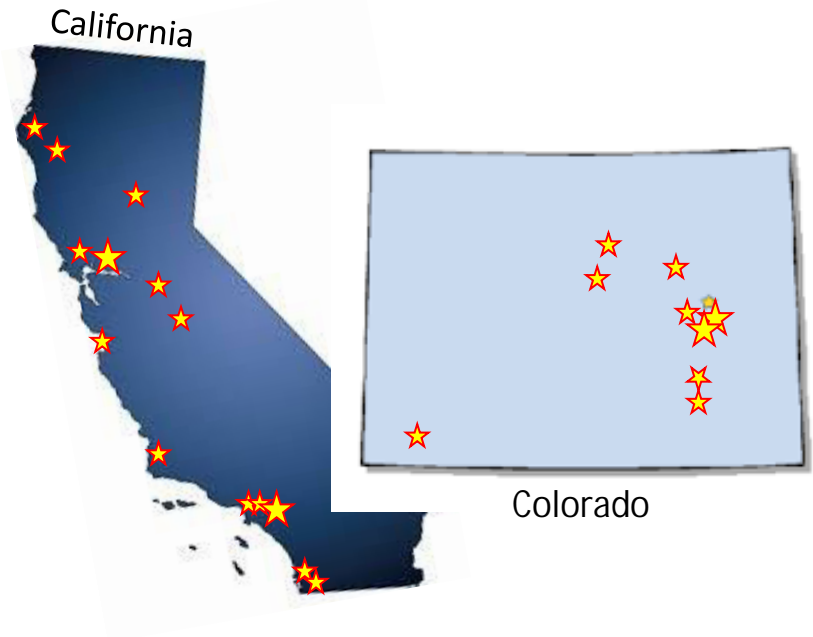
California

Colorado

Patient Portal Idea-Sharing Community

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- On-site 3.5 hour Strategic Planning Sessions
- One-year TIGER Team Approach with Workbook and Metrics
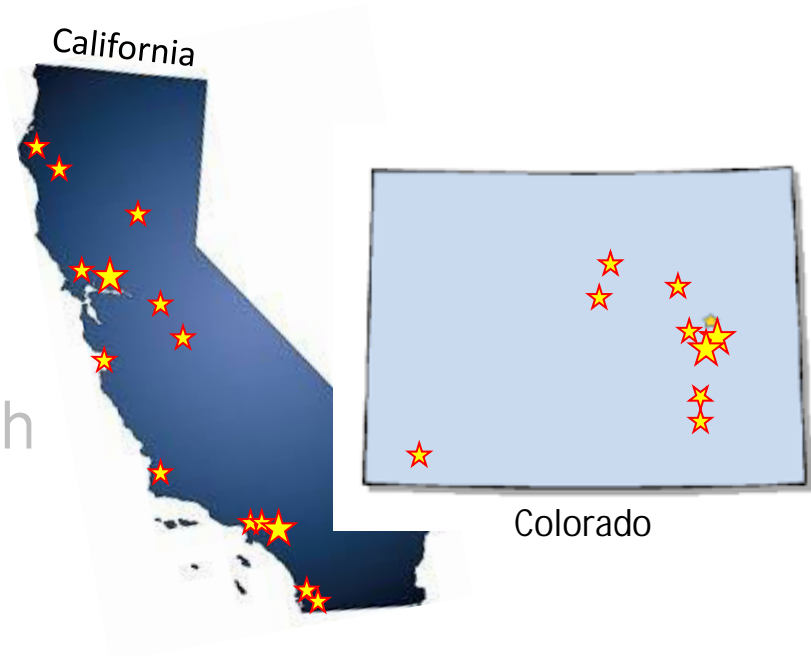
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California

Colorado

- Monthly Team Check-in
- Monthly Idea Sharing Webinar
- 500+ Resources

Top Ten Ideas: for Optimizing Use of the Patient Portal

Ah-Ha

If you just run patient portals as an IT project – you will fail.

Engaging patients is a core value and the portal is a core function in our team care processes.

- Chief of Quality Improvement of a Safety Net Clinic

Dedicated 1-Year Team

* Appointed Team Leader

* Provider, Staff, IT, Front Desk plus

  "Champions"

* Dedicated FTE Hours – One Year Timeline

* Meet Regularly – Report Regularly

Shared Resource

Patient Portal Deployment Case Study Poster

Patient Portal Policies and Procedures

Patient Portal Supervisor Job Description

Use a Workplan

* It is more involved than you think

* Use for launch, re-launch, new versions

* C-Suite sign-off

* Vendor support

Ah-Ha

The spreadsheet for each part of our workplan was a hit with my portal team AND our CEO!

...the team loved seeing progress across each area at our meetings – <u>nothing got lost</u>

...the CEO loved seeing the color coded progress – she could focus on the most important support needed

- Portal TIGER Team Leader

Elements of Success

- Organizational Portal Strategy
- Patient Portal Team
- Launch Plan
- Interoperability
- Enrollment/Password Reset
- Portal Features/Functions
- Support Plan
- Training Plan

- Patient Engagement and Feedback
- Internal Feedback
- Marketing Planning
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- Minor Users
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- Non-English Language Options

Patient Portal Operations Workplan

Example Major Work Area	EXAMPLE Activity	Point of Contact	First 6 Months		Second 6 Months	
			Status	Comments	Status	Comments
1. Organize Patient Portal Project on a monthly basis						
	a. Meet Monthly with at least team, clinical, ops and IT portal project leaders in attendance.		🟩	example colors		
	b. Select Key Team Members					
	b. 1. Portal Overall Team Leader	Pauline				
	b. 2. Portal Clinical Leader	Dr. Lee				
	b. 3. Portal Staff Support Leader	Anupriya				
	b. 4. Portal IT/IS Support Leader	Juan	🟥🟨			
	c. Review Portal Use Data from Vendor at each meeting					

Patient Portal Operations Workplan

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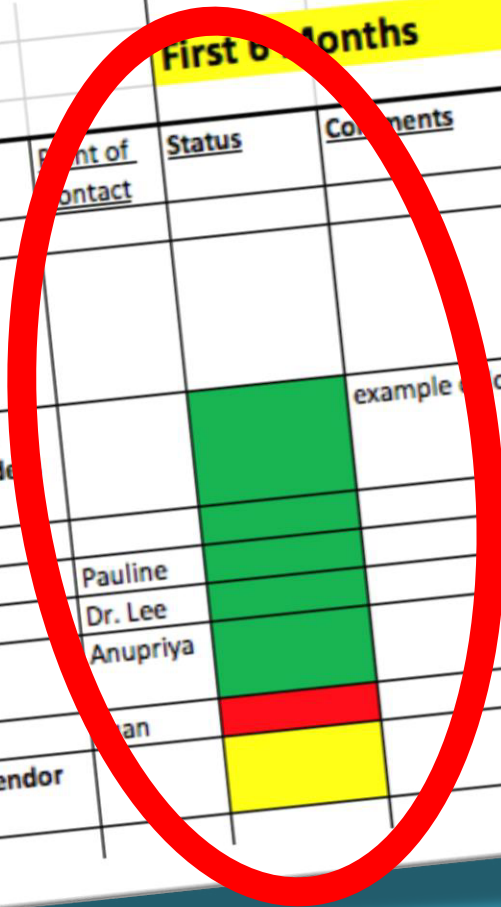
Shared Resource

Workplan Tracking Spreadsheet
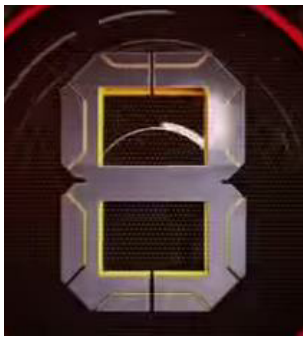
Support Organic Workflows

✳ Don't <u>force</u> changes to the team's care processes

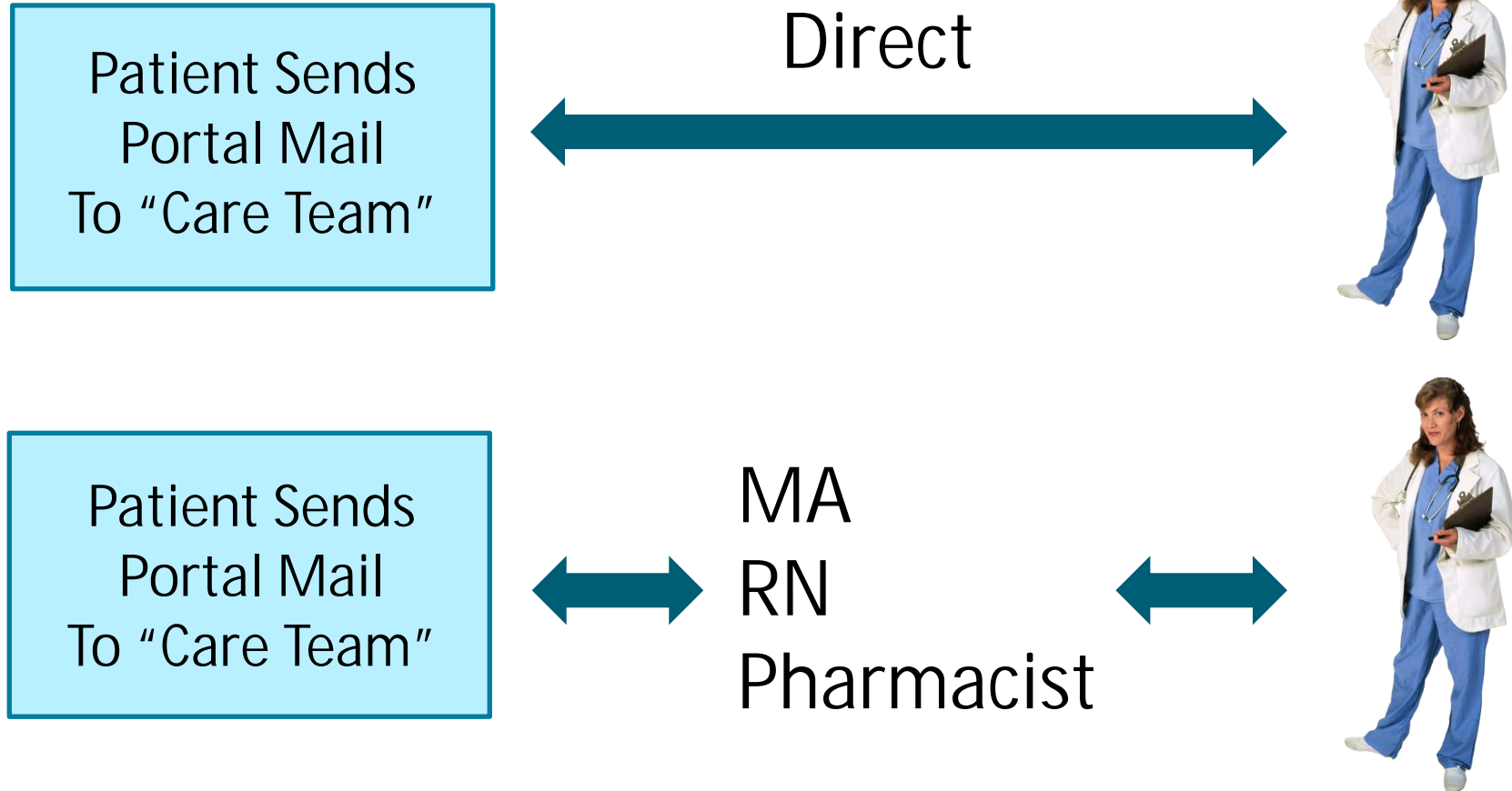✳ Have the Care Teams lead discussions

Ah-Ha

Setting up <u>patient portal workflow tasks</u> went much more smoothly when we first asked ourselves…

How do we do it now?

- CMO, Urban FQHC

Portal Communications

Patient Sends
Portal Mail
To "Care Team"

Direct

Patient Sends
Portal Mail
To "Care Team"

MA
RN
Pharmacist

Shared Resource

Patient Portal Workflow Examples

Let Data Drive Focus

✳ Keep reporting simple at first – what does the vendor provide?

✳ Don't forget log-in error rate

✳ Move to portal page metrics – what pages are used? How much time spent on page?

Ah-Ha

Portals also increase patient loyalty. Patients with access to a portal are 13 times more likely to schedule a return visit. Over 18 months, practices that adopted portals had an 80 percent retention rate, compared to a 67 percent retention rate of practices without portals.

- Portal Study Results, April 2016

*Patient portal adoption increases collections, patient engagement: 3 things to know, Pallardy C, April 4, 2016, Becker Hospital Review, accessed online 12/8/16.

Data Drives Focus

Implementation Measures

- Trends in enrollment and active use
- Most Used Features
- Error Reports
- Provider and patient satisfaction with portal

Impact Measures

- Reduced call volume
- Reduced missed appointments
- Patient satisfaction with care
- Screening/vaccination rates
- Better self-management

Patient Enrollment and Portal Use
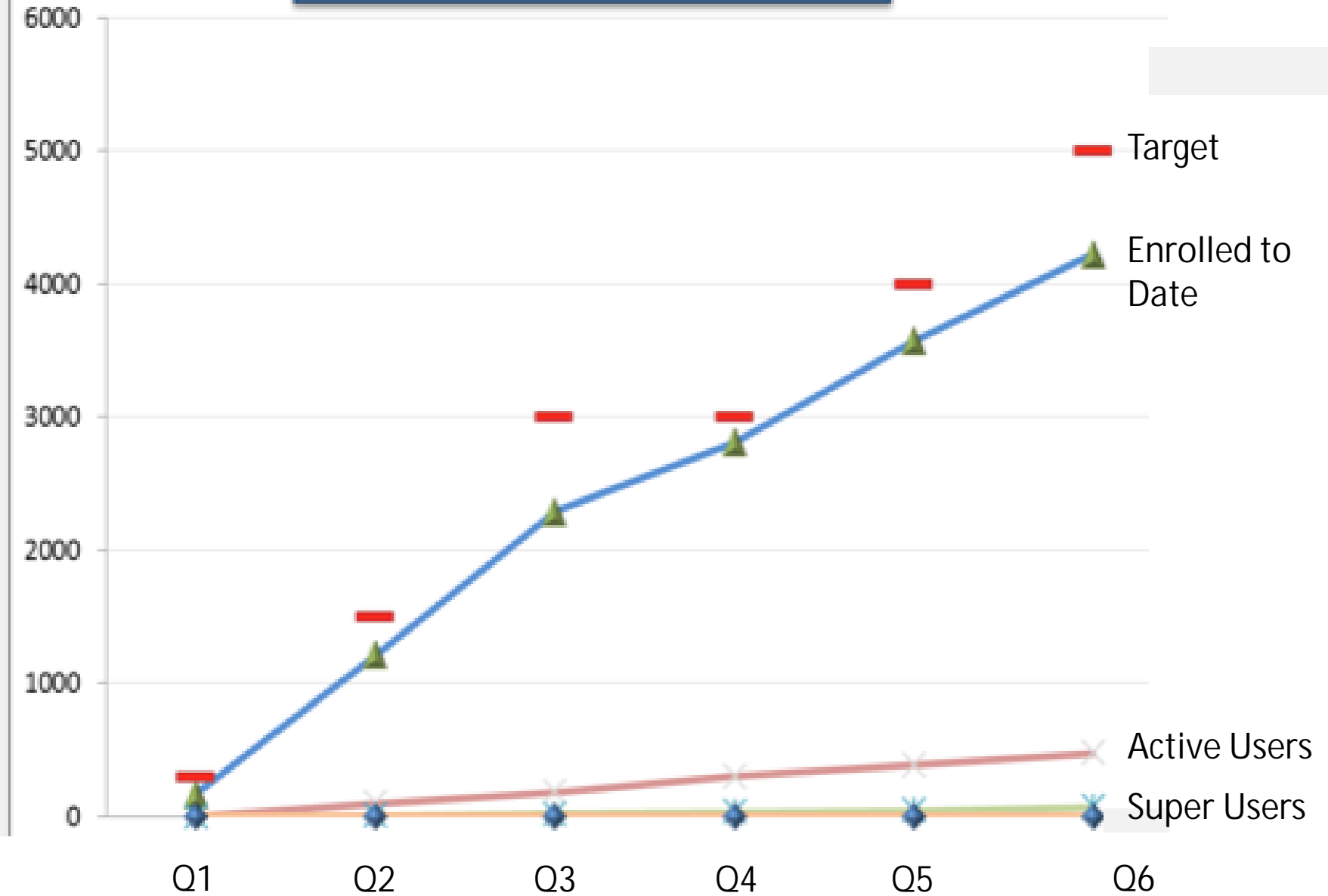
Percentage of Patients Reporting that the Patient Portal Saved a Call or Visit to Clinic
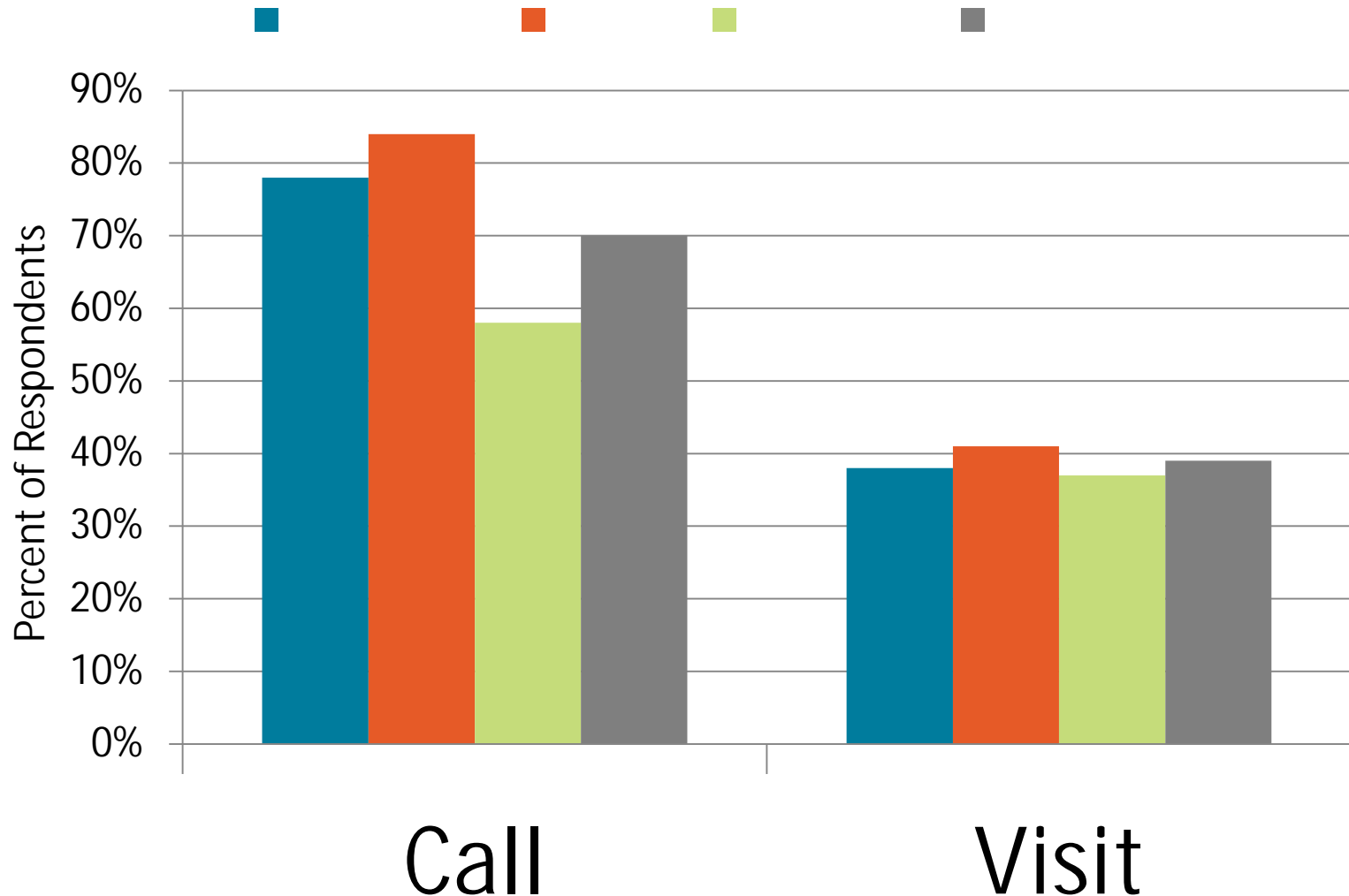
Shared Resource

Example Portal Team Patient Portal Dashboard

Example Quarterly CEO Report

Use Portal in Care Plan

⁎ Care teams should encourage the active engagement via the portal

⁎ Think outside just secure e-mail

Ah-Ha

A portal that provides mostly administrative functions, such as scheduling appointments and obtaining lab results, will be helpful but not as interesting to patients. Patients will be more likely to use a portal that is designed to address their personal needs. Portals that include interactive and personalized tools will be more engaging.

- HealthIT.gov

Track Mental Health Between Visits
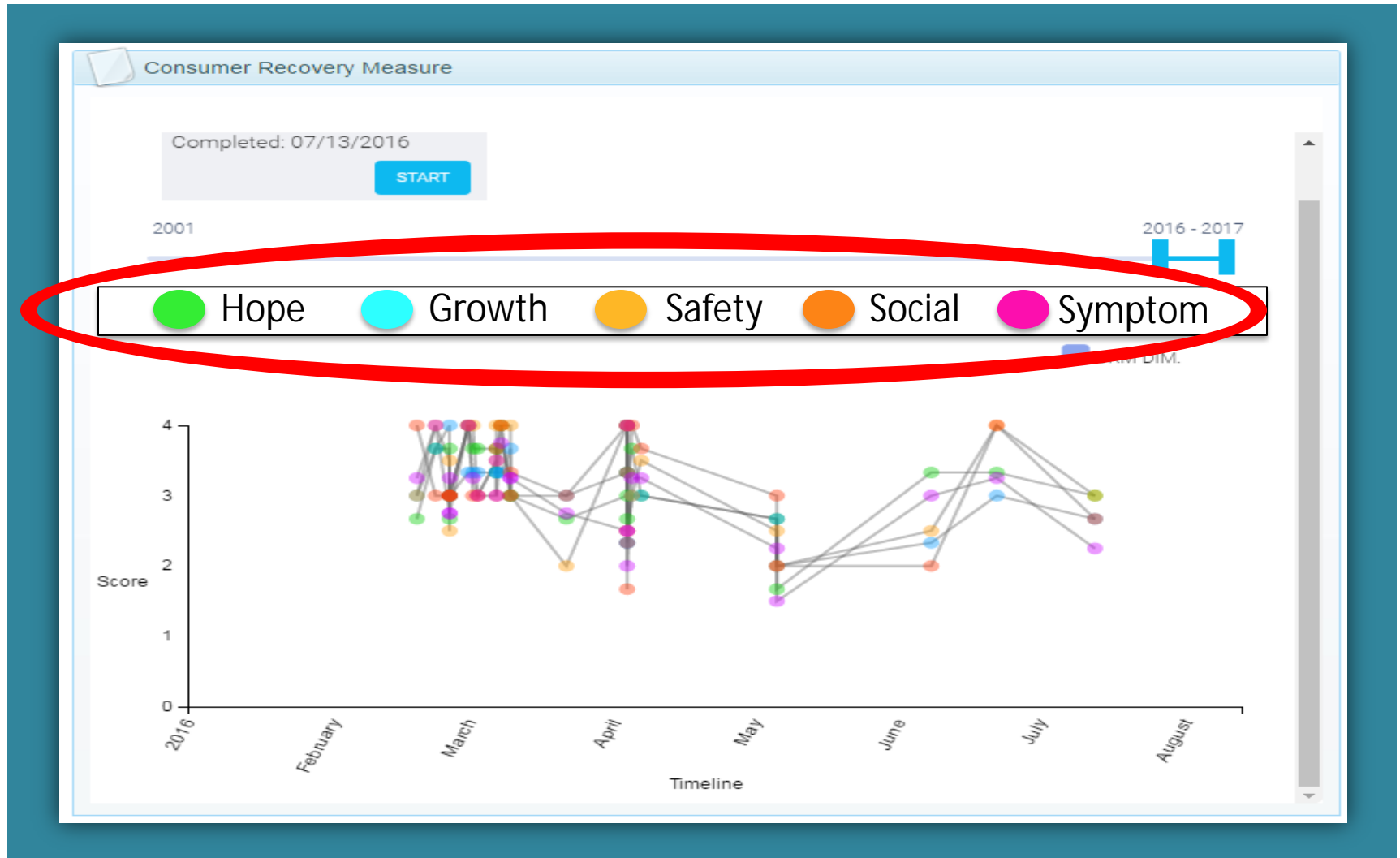
Impact

NUMBERS:

	June 1	July 1	August 1
Total PINS Issued:	4,931	5,339	5,498
Total PINS Activated:	1176	2,056	2,241
CRMs Completed:	522	1,534	1,561
New Appointments Requested:	112	142	164
Appointment Reschedule Requests:		51	70
Appointment Cancellation Requests:	58	66	81
Direct Messages Between Staff and Individuals	246	263	335

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Use Champions

* Have staff - who are also clinic patients - use portal!

* Pro Staff and All Staff video and personal story

* Provider and patient stories via e-mail

* Put framed story in elevator, wait areas

Ah-Ha

I believe that the portal has become more accepted by staff as they become more knowledgeable about the it.

Staff who are also patients use it.

Visit coordinators and triage nurses use it daily, so it has become habit for us. Most of our staff feels that it is a great communication tool to take advantage of.

- "Portal Champion" Visit Coordinator

Shared Resource

*Link to YouTube Videos:
- Patient Portals: Benefit to Providers
- Patient Portals: Patients' Perspectives

*http://www.chcf.org/patient-portals

Make Feedback Easy #1

✳ Use Online Survey Process

✳ E-mail link and tell how long it takes

✳ Take action and report results quickly

✳ Target feedback

Good Morning, Dr. Lee,

I can't thank you enough for your assistance last quarter in providing fe

I appreciated your comments at the Pro Staff meeting about how easy
and how fast our portal team fixed the broken data field you identified

Please link to this new survey so we can get your feedback again. A
of responses for each question so you know immediately how your c

6 Questions, 5-Minutes, Free $5 Starbucks Card
https://surveymonkey.com/portalsurvey

When completed, you will see a $5 Starbucks card magically appea

Thanks again for taking 5 minutes to help us make our portal bette

Warmly,

Christina Alvarez
CEO

Patient Satisfaction

Statement	%
Portal information is easy to understand	73%
Portal is easy to register to use	72%
Portal is easy to use	69%
Portal makes me feel connected to my provider	65%
Portal has improved my communication with the clinic	50%

*Percentage "Agreeing" or "Strongly Agreeing"

Provider Team Satisfaction

Statement	%
Portal is a good way to reach me about non-urgent matters	78%
Portal can improve my relationship with my patients	65%
Portals make it easier to do my job	60%
Using the portal takes up too much of my time	22%
I will get more calls due to patients not understanding the portal information	10%

*Percentage "Agreeing" or "Strongly Agreeing"

Ah-Ha

I want to be able to put my kids to bed and THEN deal with scheduling the next doctor's appointment!

By the time I get someone on the phone, I have forgotten something – I'd rather have time to think about what I need and write it down.

- Patient Advisory Group - Community Clinic Patient

Shared Resource

Example Online Patient Survey

Example Online Provider and Staff Survey

Make Feedback Easy #2

✳Virtual Feedback groups!

Ah-Ha

The link to the immunization page is no longer working!

- Virtual Feedback From an MA During Beta Testing of New Portal Version

Know Your Target Patient

✳ What patient group does your board want to focus on for 2017?

✳ How should you communicate with them?

Ah-Ha

To get to know our patients, we did a "Tech Survey":

- 50% have smartphone access to internet
- 20% have desktop computer access to internet

We are going to focus more on our vendor smartphone application now!

- Portal Team Leader, Inner-city Safety Net Clinic

Shared Resource

Tech Survey of Patients

Build Targeted Marketing

✳ Key message: "Saves Time"

✳ Target specific patient use

✳ Flexible, stand-alone

Survey Question

Ah-Ha

What was the absolute best marketing action to jump portal enrollment and use?

...put a poster right in front of the blood draw chair. "Want to see your results in 24 hours?"

- Kaiser Patient Portal Launch Team Member

Get Your Lab Results Faster

Sign up for
MY HEALTH GATEWAY
Your Online
Wellness
Connection

TAKE ONE →

11 by 17 Acrylic Holder

Attached Acrylic Tri-fold Holder
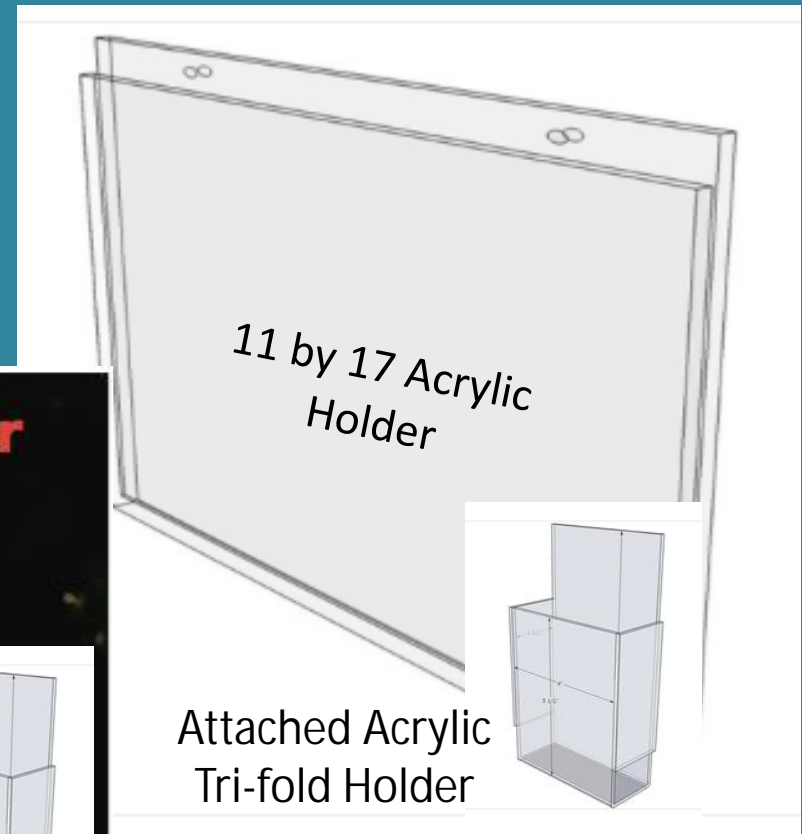
Shared Resource

- Poster artwork – free, unrestricted use

- http://www.chcf.org/ patient-portals
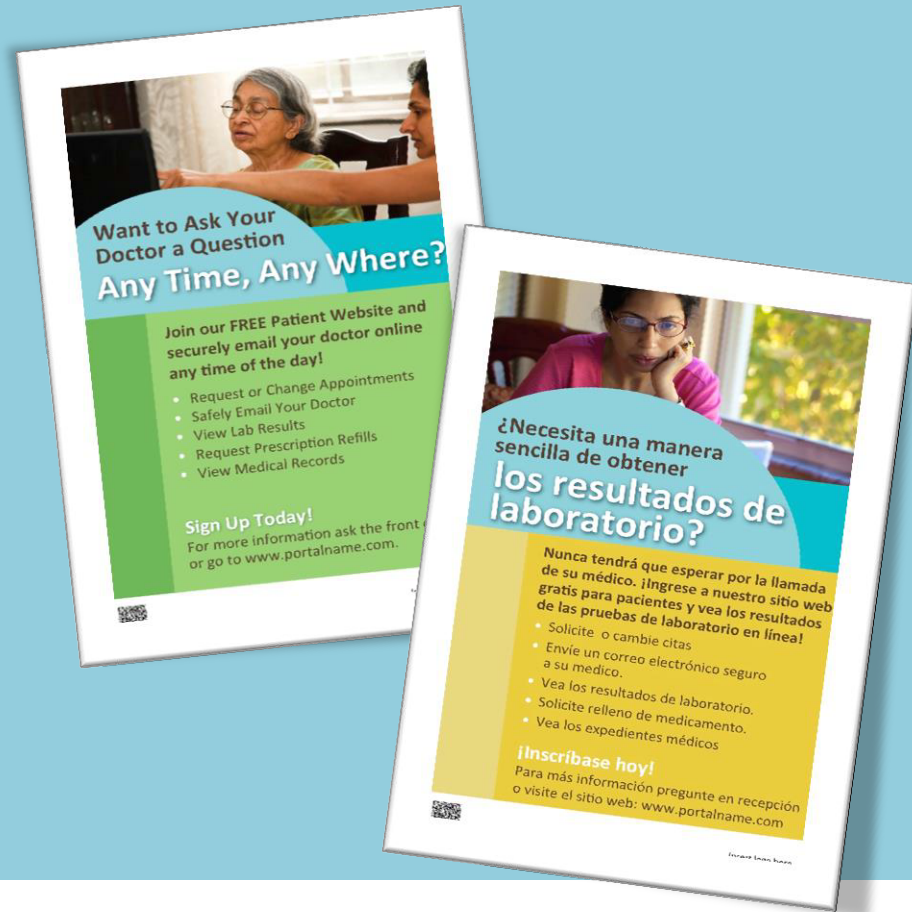
The Future

Portals Advancements

In the future, expect portals to better address:

- Language barriers

- Disparities in access to "patient engagement" processes

- Minors use of portal

- Text connections (next month!)

- E-visits – telemedicine – mobile engagement (Feb-Mar)

- Social connections – support sites

Ah-Ha

"We absolutely need to figure out how to <u>reduce barriers to meaningful access</u> to a patient's trusted primary care team. If we don't, patients will continually seek other sources of advice or end up seeking care in the ER or urgent care."

- CMO of a Safety Net Care Network

Questions/Comments?

- Dedicated 1-Year Team

- Use a Workplan

- Support Organic Workflows

- Use Portal In Care Process

- Use Champions

- Know Your Customer

- Make Feedback Easy #1

- Make Feedback Easy #2

- Know Your Patients

- Build Target Marketing

THANK YOU!

Resources

DropBox Site (Through January 2016)

The California HealthCare Foundation:
http://www.chcf.org/patient-portals

The Colorado Health Foundation – Patient Portal Knowledge Center (opens April 2016)

Jim Meyers, 510-761-1609 jimmeyersdrph@gmail.com

California Improvement Network News

- Alternatives to Face to Face Visits: Text messaging, Jan. 26

- Motivational Interviewing: Apply now, Dec. 16th calquality.org

- Join the network: www.chcf.org/cin