Welcome!
All lines are muted.
Please use chat to ask questions or to comment at any time.

Alternatives to Face to Face Visits
Top 10 Ideas for Optimizing Your Patient Portal

Jim Meyers, DrPH, MHA, LFACHE

December 15, 2016
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

- Portal Basics
- Idea-Sharing Community
- Top Ten Optimization Ideas
- The Future
Survey Question
Patient Portal Basics
What is a Patient Portal?

- Patient
- Family
- Care Giver
- Secure Connection
- Internet Link
- Smart Phone/Computer
- Vendor App
- Provider
- Provider Organization
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

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## Elements of Successful Planning

<table>
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<th>Patient Engagement and Feedback</th>
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Idea-Sharing Community
Patient Portal Idea-Sharing Community

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

• On-site 3.5 hour Strategic Planning Sessions
• One-year TIGER Team Approach with Workbook and Metrics
Patient Portal Idea-Sharing Community

- Coaching and Idea Sharing Since 2010
- 25+ Organizations
- California and Colorado
- On-site 3.5 hour Strategic Planning Sessions
- One-year TIGER Team Approach with Workbook and Metrics

- 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 – nothing got lost

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

- Portal TIGER Team Leader
# Elements of Success

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# Patient Portal Operations Workplan

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<tr>
<th>Example Major Work Area</th>
<th>EXAMPLE Activity</th>
<th>Point of Contact</th>
<th>Status</th>
<th>Comments</th>
<th>Second 6 Months</th>
</tr>
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<tbody>
<tr>
<td>1. Develop Patient Portal Project Plan on monthly basis</td>
<td>a. Meet Monthly with at least team, clinical, ops and IT portal project leaders in attendance.</td>
<td>Pauline</td>
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<td>example colors</td>
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<td></td>
<td>b. Select Key Team Members</td>
<td>Dr. Lee</td>
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<td></td>
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<td></td>
<td>b. 1. Portal Overall Team Leader</td>
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<tr>
<td></td>
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<td>Anupriya</td>
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<tr>
<td></td>
<td>b. 3. Portal Staff Support Leader</td>
<td>Juan</td>
<td></td>
<td></td>
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Shared Resource

Workplan Tracking Spreadsheet
Support Organic Workflows

* Don’t **force** changes to the team’s care processes
* Have the Care Teams lead discussions
Setting up patient portal workflow tasks 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

MA
RN
Pharmacist

Patient Sends Portal Mail To “Care Team”
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

- Target
- Enrolled to Date
- Active Users
- Super Users

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Percentage of Patients Reporting that the Patient Portal Saved a Call or Visit to Clinic

- **Call**: Approximately 80% of respondents.
- **Visit**: Approximately 40% of respondents.

The chart shows the percentage of patients who reported that the patient portal saved a call or visit to the 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

Consumer Recovery Measure

Completed: 07/13/2016

Timeline

Score
# Impact

<table>
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<tr>
<th>NUMBERS:</th>
<th>June 1</th>
<th>July 1</th>
<th>August 1</th>
</tr>
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<td>Total PINS Issued:</td>
<td>4,931</td>
<td>5,339</td>
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<td>39</td>
<td>51</td>
<td>70</td>
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<td>58</td>
<td>66</td>
<td>81</td>
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Use Champions

 mesure 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 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 feedback to us.

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 list of responses for each question so you know immediately how your colleagues are feeling.

6 Questions, 5-Minutes, Free $5 Starbucks Card

https:// surveymonkey.com/portalsurvey

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

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

Warmly,

Christina Alvarez
CEO
# Patient Satisfaction

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<th>Statement</th>
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<tbody>
<tr>
<td>Portal information is easy to understand</td>
<td>73%</td>
</tr>
<tr>
<td>Portal is easy to register to use</td>
<td>72%</td>
</tr>
<tr>
<td>Portal is easy to use</td>
<td>69%</td>
</tr>
<tr>
<td>Portal makes me feel connected to my provider</td>
<td>65%</td>
</tr>
<tr>
<td>Portal has improved my communication with the clinic</td>
<td>50%</td>
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*Percentage “Agreeing” or “Strongly Agreeing”*
# Provider Team Satisfaction

*Percentage “Agreeing” or “Strongly Agreeing”*

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

11 by 17 Acrylic Holder
Attached Acrylic Tri-fold Holder
• 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 reduce barriers to meaningful access 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