Patient Portals

How to Successfully Implement a Patient Portal for Meaningful Use and Beyond

February 6, 2014
Today’s Presenters

• Deepthi Rajeev, PhD, MS, MSc
  Medical Informaticist, *HealthInsight*
• Clare Tobin Lence, MPH, MPP (c)
  Project Coordinator, *HealthInsight*
• Brux McClellan, MPH, MHA
  Project Coordinator, *HealthInsight*
INTRODUCTION

Brux McClellan,
Project Coordinator, HealthInsight
Who is HealthInsight?

• Private, non-profit community-based organization dedicated to improving health and health care
  – Medicare Quality Improvement Organization (UT, NV, NM)
  – Agency for Healthcare Research and Quality Chartered Value Exchange (UT, NV)
  – Health Information Technology Regional Extension Center (UT, NV; NM subcontractor)
  – IC³ Beacon (UT, 2010-2013)
Our Experience

Meaningful Use Support
• Helped over 1100 providers meet Stage 1 Meaningful Use requirements
• Helped over 400 physician practices in Nevada and Utah overcome barriers to adopting and effectively using EHR

Patient Portals
• Two projects funded by the Office of National Coordinator of Health Information Technology to:
  – Identify key features of portals that impact adoption and use
  – Pilot test the sharing of patient data across multiple types of portals
Learning Objectives

- Patient portal requirements of Meaningful Use
- How to choose a patient portal
- How to successfully implement a patient portal
- How to encourage patient use of the portal
- Patient portals and providers: Beyond Meaningful Use
Definition

- **Patient Portal** = A patient portal is a secure online website that gives patients convenient 24-hour access to personal health information from anywhere with an Internet connection.

http://www.healthit.gov/providers-professionals/faqs/what-patient-portal
Patient Portals on the Rise

• Meaningful Use Requirements
• Clinical Integration & Accountable Care
• Consumer Demand for Health Information Technology

Poll Question

Q. At which stage is your practice in implementing a patient portal?
   a. Starting to consider implementing a portal
   b. Preparing to implement a portal
   c. Implemented a portal but still learning
   d. Already skilled at using a portal
PATIENT PORTAL REQUIREMENTS OF MEANINGFUL USE

Brux McClellan,
Project Coordinator, HealthInsight
Poll Question

Q. How well prepared do you feel to meet the requirements for Meaningful Use related to patient portals?

a. Very Prepared
b. Somewhat Prepared
c. Unsure
d. Not Very Prepared
e. What Requirements?!
# Meaningful Use Core Measures

1. CPOE
2. eRx
3. Demographics
4. Vital Signs
5. Smoking Status
6. Clinical Decision Support
7. Provide Ability to View Records
8. Clinical Summaries
9. Security Risk Assessment
10. Clinical Lab Test Results
11. Generate List of Patients
12. Preventative Reminders
13. Patient Education
14. Medication Reconciliation
15. Summary of Care Record
16. Immunization Registry
17. Secure Electronic Messaging

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### Patient Electronic Access

<table>
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<tr>
<th>Objective</th>
<th>Provide patients the ability to view online, download and transmit their health information within four business days of the information being available to the EP.</th>
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<td>Measure 1</td>
<td>More than 50 percent of all unique patients seen by the EP during the EHR reporting period are provided timely (available to the patient within 4 business days after the information is available to the EP) online access to their health information.</td>
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| Exclusion | Any EP who:  
(1) Neither orders nor creates any of the information listed for inclusion as part of both measures, except for "Patient name" and "Provider's name and office contact information, may exclude both measures.  
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Measure 7 of 17
Date issued: October, 2012

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# Stage 2
## Eligible Professional
### Meaningful Use Core Measures
#### Measure 17 of 17
Date issued: October, 2012

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Any EP who participates in the reporting period who does not conduct 50 percent or more of his or her patient encounters in a county that does not have 50 percent or more of its housing units with 3Mbps broadband availability according to the latest information available from the FCC on the first day of the EHR reporting period.

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Don’t Get Overwhelmed!!

• In 2014, you only have to meet Meaningful Use for one calendar quarter
• Contact your local Regional Extension Center for help
CHOOSE A PATIENT PORTAL

Clare Tobin Lence,
Project Coordinator, HealthInsight
Choose a Patient Portal

Questions to ask when selecting a portal:

1. Is this portal covered by HIPAA?
2. How will this portal integrate with my EHR?
3. Can patients edit part or all of their record?
4. What features are included in this portal?
Choose a Patient Portal

Is this portal covered by HIPAA?

– Many different types of portals
– Not all are covered by the Health Insurance Portability and Accountability Act
  • If not, a Business Associates Agreement may alleviate information security concerns
– Consider carefully before choosing a free portal
Choose a Patient Portal

How will this portal integrate with my EHR?

- Bi-directional flow of information
- Automatic or manual transfer of data
- Reporting of MU measures
  - Using a certified EHR and portal is required
    - Stage 1 or Stage 2
    - Complete or modular
  - Reporting algorithms
Choose a Patient Portal

Can patients edit part or all of their record?

– Standard and optional features
– Adding patient-entered information back into your EHR
Choose a Patient Portal

What features are included in this portal?

– Wide variation
– Varying cost structure based on which features are included or activated
Choose a Patient Portal

• Key features and functionalities
  – For Meaningful Use
    • Two-way secure messaging
  – For Patients
    • Lab results
    • Appointment scheduling
    • Simple password reset process
    • Mobile device compatibility
Choose a Patient Portal

• Mobile device compatibility

- 34% cell internet users go online mostly using their phones
- 63% of cell owners use their phones to go online
- 91% of American adults own a cell phone

http://pewinternet.org/Commentary/2012/February/Pew-Internet-Mobile.aspx
IMPLEMENT A PATIENT PORTAL

Deepthi Rajeev,
Medical Informaticist, *HealthInsight*
Implement a Patient Portal

Understand your User

- Implementing a patient portal is not the same as implementing an EHR
- New stakeholders with new needs
- Change in mindset
- Don’t forget the patient in patient portal!
Implement a Patient Portal

Phases

- Pre-implementation
- Implementation
- Post-implementation
Implement a Patient Portal

Pre-implementation

– Portal implementation team and a champion
– Define metrics to assess progress and success
– Coupled with ‘Choosing a portal’
  • Patient perspective
– Start collecting patients’ email addresses
Implement a Patient Portal

Workflow Changes

- Determine workflow changes needed
- Identify tasks, roles, and responsibilities
- Workflow diagrams to integrate the patient portal into routine workflow
Implement a Patient Portal

Establish New Policies

- Examples:
- Time interval between appointment request and appointment to avoid ‘no-show’
- Protocol for unanswered messages
- Releasing lab results after provider-patient communication
Implement a Patient Portal

Implementation

- Train providers and clinic staff
  - Role-specific and task-specific training
- Integrate enrollment and patient-training into the new workflow
- Train users not just on the ‘how’ but also the ‘why’
- Advertise!
Implement a Patient Portal

Post-Implementation

– Evaluate and monitor adoption and use
– Gather feedback from patients and providers
  • Assess provider and patient satisfaction
  • Determine challenges and barriers
– Re-train if needed
– Additional features
  • Select and roll-out
ENCOURAGE PATIENT USE OF THE PORTAL

Clare Tobin Lence,
Project Coordinator, HealthInsight
Patient Use

1. Raise awareness
2. Communicate the benefits clearly
3. Consider security and privacy concerns or lack of technological ability
4. Set expectations

Patients who use portals generally love them -- even if they use them only for limited functionality, such as viewing lab results
Patient Use

Raise Awareness

- Physician recommendation
- Implement a campaign
  - Put up posters
  - Provide flyers with sign-up instructions
  - Wear t-shirts
  - Change the phone line hold music
  - Send an email to patients’ personal address
  - Have front office staff sign people up
  - Provide a computer kiosk
Patient Use

Clearly Explain the Benefits to Patients

- View lab results sooner
- Schedule appointments online
- See progress over time on tests
- Obtain a copy of the visit summary
- Request prescription refills
- Secure messaging:
  - Communicate with the office even when it is closed
  - Ask their doctor a question without having to be on the phone at the same time
Patient Use

Address Privacy and Security Concerns

– Ensure that the portal is secure
– Explain privacy and security protections to office staff
– Recognize that not all patients will be convinced, or capable of using the portal
Patient Use

Set Expectations for the Portal

– Let patients know...
  • The portal is not for emergencies, or for same-day concerns
  • When they can expect a response through portal messaging
  • Who to call with questions
PATIENT PORTALS AND PROVIDERS: BEYOND MEANINGFUL USE

Deepthi Rajeev,
Medical Informaticist, HealthInsight
Providers and Patient Portals

Beyond Meaningful Use

- Time and cost savings
- Patients move from passive witnesses to engaged partners
- Tool to educate patients: health literacy
- Shift towards preventive care and patient-centered care
Providers and Patient Portals

Tips to Improve Adoption

– Friendly competitions
– Incentives
– Share post-visit summaries electronically
– No more phone tag!
– Preparing for the future!
  • Meaningful Use Stage 3 → patient empowerment
KEY TAKE-AWAYS

Brux McClellan,
Project Coordinator, *HealthInsight*
Take-Aways

- Focus on all the benefits of portals, not just Meaningful Use requirements
- Use your local Regional Extension Center
- Ask questions before choosing a portal
- Include features that patients will value
- Modify clinical workflow to integrate the portal
- Tell patients about the portal and the key features
- Preparing for the future → patient-centered care
Poll Question

Q. How well prepared do you feel to meet the requirements for Meaningful Use related to patient portals?

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Learning Objectives

Patient portal requirements of Meaningful Use

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Patient portals and providers: Beyond Meaningful Use
Questions?

- Brux McClellan
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