

HEALTH INFORMATION TECHNOLOGY,

HIT EQ

EVALUATION, AND QUALITY CENTER

Patient Portal Optimization Peer Learning Series

Session 1: September 10, 2020

Intro to HITEQ

The HITEQ Center is a HRSA-funded National Training and Technical Assistance Partner (NTTAP) that collaborates with HRSA partners including Health Center Controlled Networks, Primary Care Associations and other NTTAPs to engage health centers in the optimization of health IT to address key health center needs through:

- A **national website, HITEQcenter.org**, with health center-focused resources, toolkits, training, and a calendar or related events.
- **Learning collaboratives, remote trainings, and on-demand technical assistance** on key content areas.



HITEQ Topic Areas

Access to comprehensive care using health IT and telehealth

Privacy and security

Advancing interoperability

Electronic patient engagement

Readiness for value based care

Using health IT and telehealth to improve clinical quality and health equity

Using health IT or telehealth to address emerging issues: behavioral health, HIV prevention, and emergency preparedness



SESSION 1

Patient Portal Optimization



Agenda

- Overview of benefits and drawbacks
- Potential organizational benefits of portal
- Increase portal functionality
- Maximize portal use
- Closing Discussion





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Health Center Supporter | Overall Data Lover

Attendees of this session will be able to...

1

Identify one or more benefits of portal use to the organization.

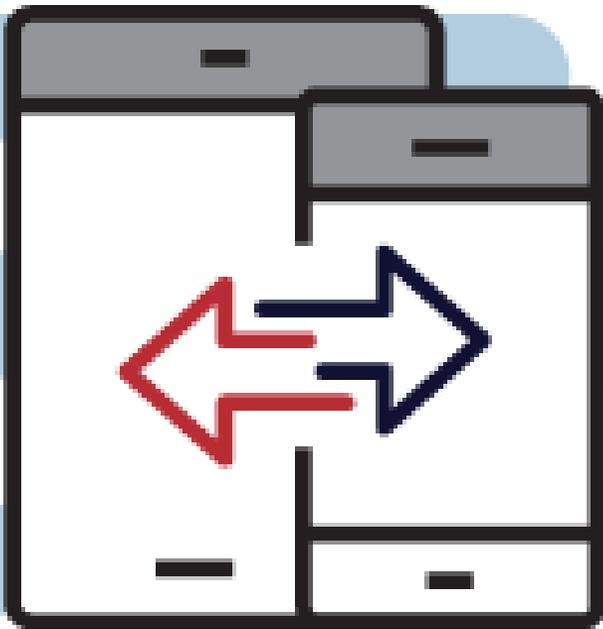
2

Describe one or more ways that using the portal can align with organizational goals.

3

Describe one way to increase portal use by patients.

How is portal adoption at your health center?



- We have had some good adoption of our patient portal, patients who use it find it valuable.
- With some significant support from our staff, we have gotten some patients set up with the portal but patients do not find much value.
- Both patients and provider staff have access to the portal, but it gets minimal usage.
- We don't use our portal at all.

Benefits and Drawbacks of Patient Portal

BENEFITS

- Can **centralize** patient communication.
- Can **reduce the call volume** to the clinic.
- Often allows many types of communication.
- Many health center services may be **easily integrated** in portal, such as telehealth, medication refills, bill pay, etc.
- Empowers patients who are able to access it.

DRAWBACKS

- Many clinics have **low portal adoption**.
- May be hard to get patients to sign up for or download patient portal.
- Some EHRs do not have high quality portals.
- Need to have a **process in place** to manage portal messages, scheduling through the portal, etc.



INCREASED PATIENT ENGAGEMENT

Benefit of portal use to organization #1

Effective patient care requires ongoing longitudinal care management, which is can be more challenging than ever in 2020.

Health center patient with chronic conditions sign up for the portal.

Health center can send appt reminders or follow up through portal.

Health center can send patient instructions and health education through the portal.

Patient can request medication refill through the portal, health center can remind them when it's time for refill.

Increased continuity and retention in care

Patient has an immediate concern, and they are considering going to urgent care.

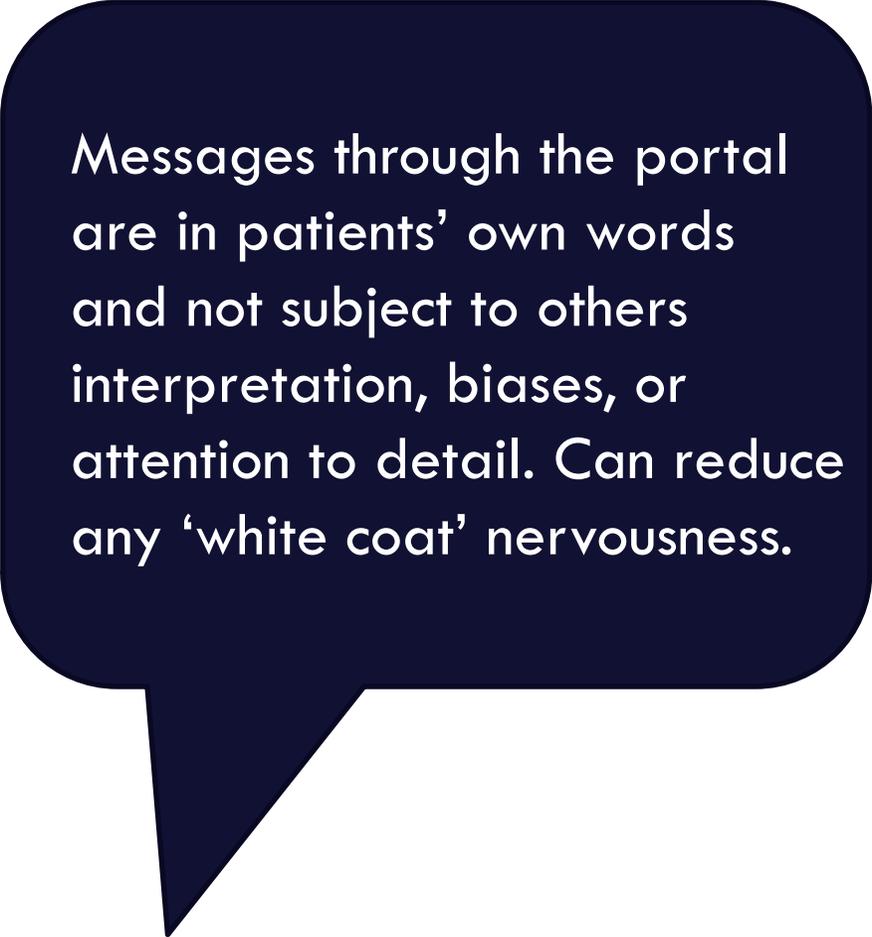
The patient can instead request a same day or virtual visit or send a message.

The care team can respond to the patient's concern, either via secure message, virtual visit, or giving the patient a call.

Improved continuity and appropriateness of care as well as improved retention in care.

Allows for the patient's own voice

- Some patients may have a hard time communicating in the office.
- Sometimes notes or requests can be subject to interpretation or other factors.
- Sometimes, details can be missed.



Messages through the portal are in patients' own words and not subject to others interpretation, biases, or attention to detail. Can reduce any 'white coat' nervousness.



SAVE TIME AND RESOURCES

Benefit of portal use to organization #2

Less time on the phone!

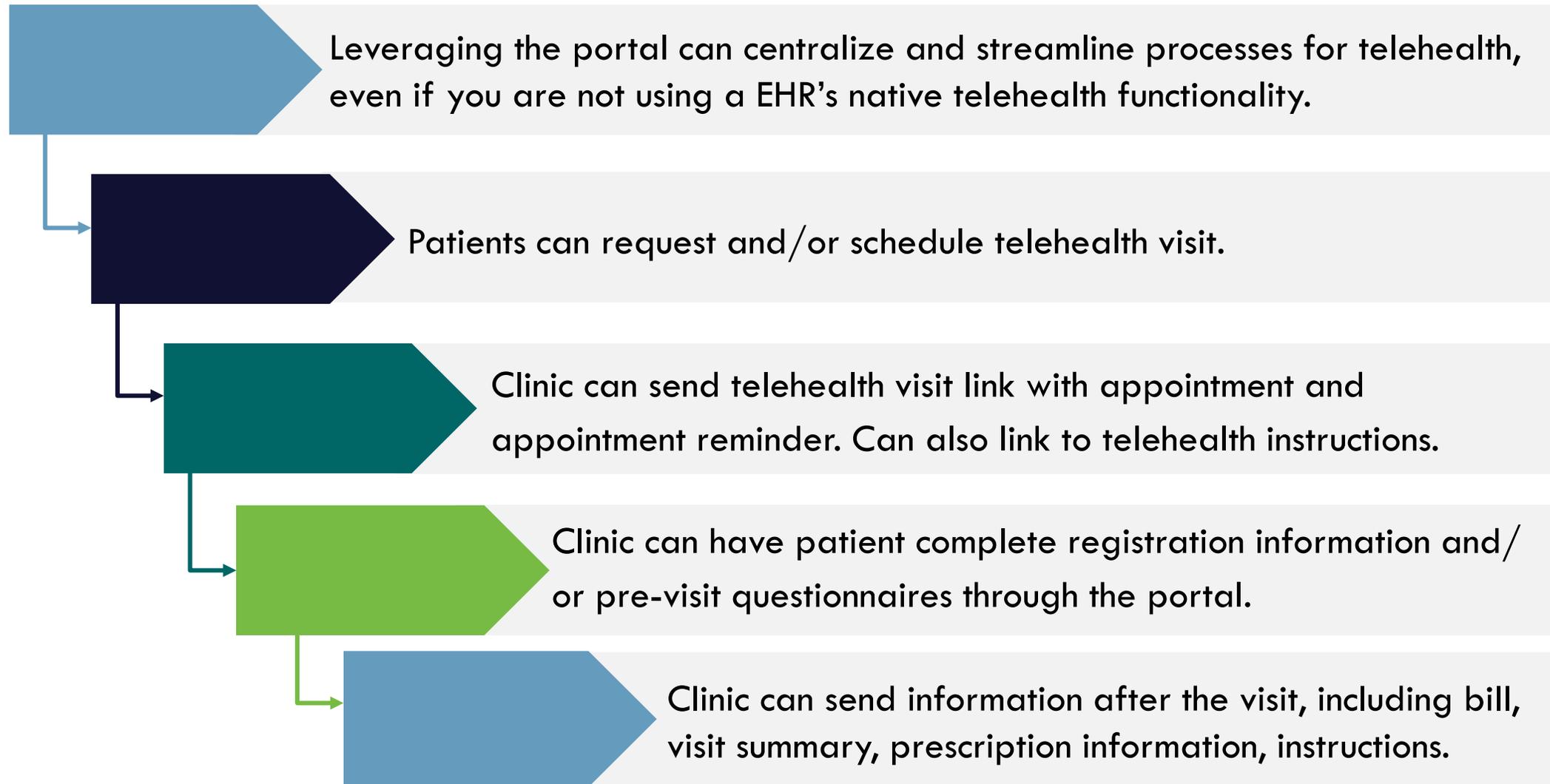
Nurses/ Care Team

- Test, lab, radiology results can be pushed to the portal, lessening the need for the care team to call with results.
- Intake/ screening can be done through portal, lessening the need for nurse or care team to call to conduct those.
- Responding to messages through portal, rather than answering voicemails at end of the day.
- Clear record of communication, reducing duplication.

Call Center

- Patients may be able to schedule appointments through the portal, so they no longer need to call to schedule.
- Patients may be able to access their record through the portal, no longer needing to call for access.
- Patients can send a portal message anytime, reducing after hours calls.

Streamline telehealth processes





ALIGNMENT WITH ORGANIZATIONAL GOALS

Benefit of portal use to organization #3

Depending on what functionality you enable, the portal can assist with many organizational needs.



Reducing Call Volume, less phone tag, freeing staff up to do other calls or tasks.



Improve chronic care management by enabling more timely prescription refills.



Decrease no shows by sending appointment reminders and getting patient confirmation.



Improved revenue by sending bills through the portal, rather than getting lost in the mail.



Improved patient information by allowing and encouraging patients to update their own information, where appropriate.

Patients, some of whom may be very familiar with using mobile apps, can act on their own health care needs. This is particularly helpful for patients who live in rural areas or with limited transportation.

Patient can request an appointment.

Patient can send secure message to care team.

Patient can update their own insurance or information.

Engaging in their care in this way has been associated with better outcomes for patients.

Can assist with meeting reporting requirements

PCMH

AC 07: Has a secure electronic system for patient to request appointments, prescription refills, referrals and test results.

AC 08: Has a secure electronic system for two-way communication to provide timely clinical advice.

CC 01: Systematically manages lab and imaging tests including notifying patients of lab and imaging test results.

CM 05: Provides a written care plan to the patient for patients identified for care management.

KM 03: Conducts depression screenings for adults and adolescents using a standardized tool.

KM 12: Proactively and routinely identifies populations of patients and reminds them about needed services (Preventive care services, Immunizations, Chronic or acute care services, etc.).

KM 15: Maintains an up-to-date list of medications for more than 80 percent of patients.

UDS

- Demographic information updated regularly
- Income updated at or within 12 months of most recent visit
- Insurance information updated at each visit.
- Depression screening done once in the year at or within 14 days of visit.



INCREASE PORTAL FUNCTIONALITY

For patients and staff



Be selective about what functionality you roll out, and how it is presented.

Staff and patients may have both tried the portal before and not had positive experiences. There may be many more user-friendly features now, but **selecting just a few high value features to start with may make the rollout smoother.**

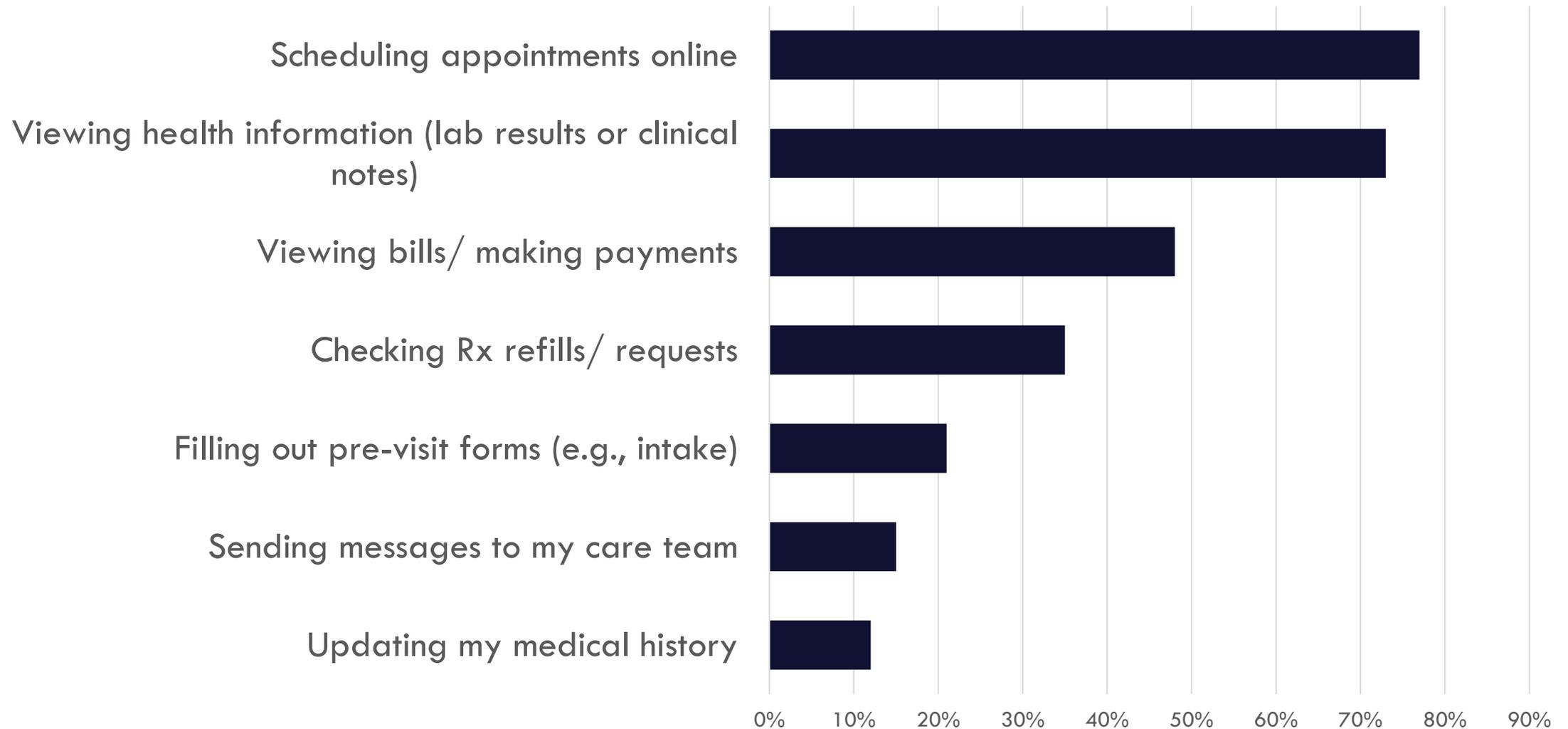


What portal features are **most useful**?

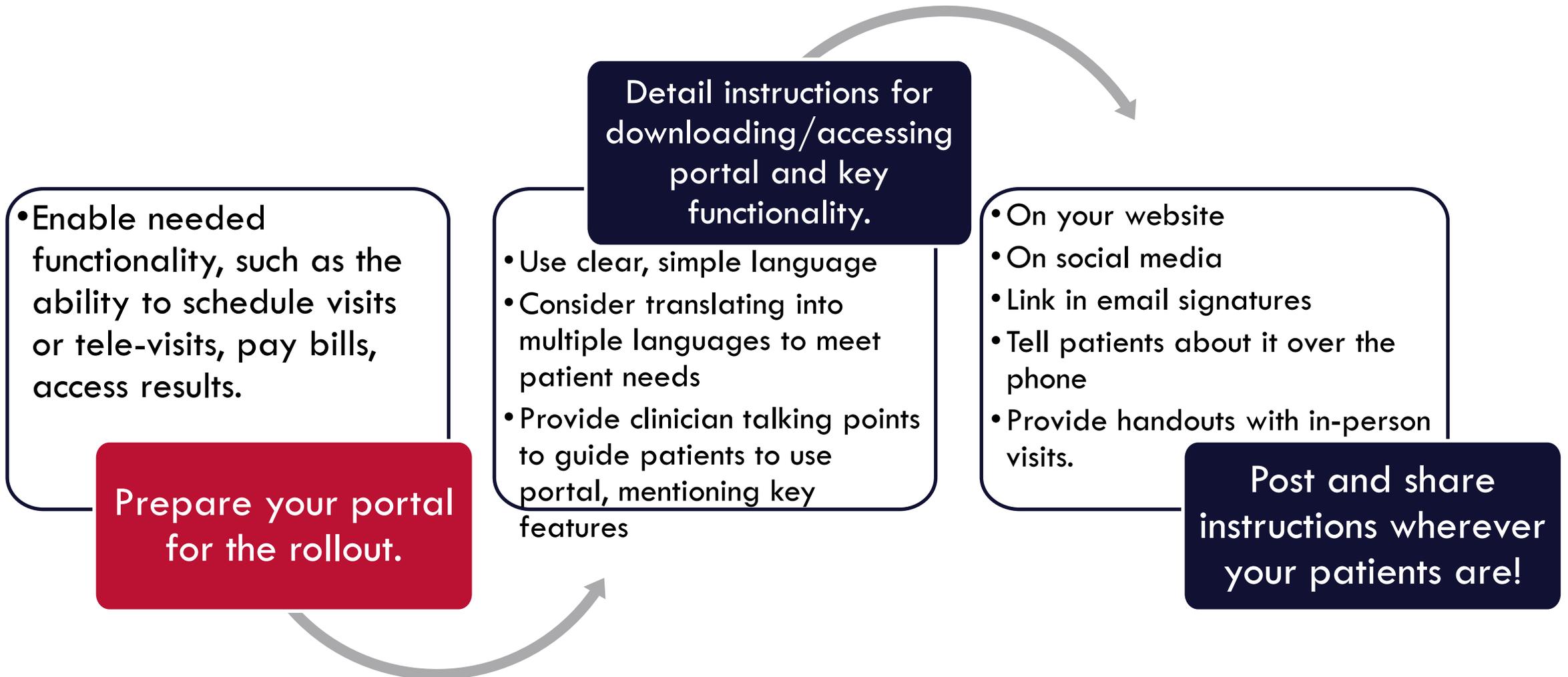


- ❑ Bill view/ bill pay
- ❑ Pre-visit and screening forms
- ❑ Self-scheduling appointments
- ❑ Bi-directional communication
- ❑ Visit summary
- ❑ Lab, radiology, test results
- ❑ Remote monitoring data
- ❑ Medication refills
- ❑ Something else?

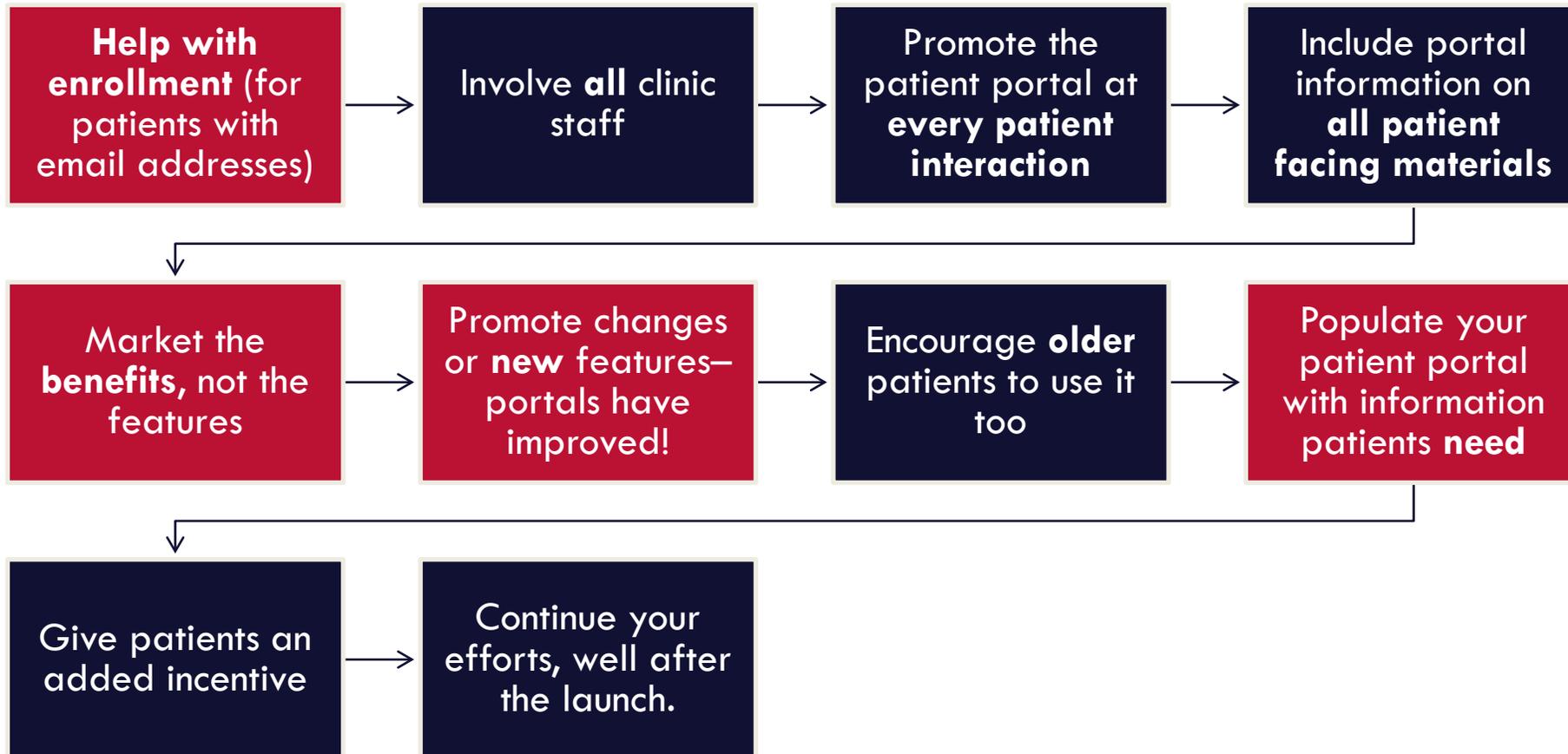
Patient preference for portal features



Addressing limitations to functionality



Dedicated resources to the pain points



Tips for addressing pain points

Train staff (and provide resources for them to) sign patients up in the moment that the portal will be useful, such as when they are getting a test for which they will want to results. Automate as much of this as possible.

Provide references and tip sheets to staff so they can clearly and concisely answer questions that arise.

Identify staff who can be portal champions, serving as a go-to resource for portal questions.

Provide talking points tailored to various staff that tout the benefits of the portal. Think about three bullets for each group: call center, clinical, IT, leadership, etc. and who the audience is for each.

What portal features are you **worried** about or **has not gone well** when you tried it?



- ❑ Bill view/ bill pay
- ❑ Pre-visit and screening forms
- ❑ Self-scheduling appointments
- ❑ Integrated telehealth
- ❑ Bi-directional communication
- ❑ Visit summary
- ❑ Lab, radiology, test results
- ❑ Remote monitoring data
- ❑ Medication refills
- ❑ Something else?



MAXIMIZE PORTAL USE

By improving the value for users

Consider who the portal can best serve

You may decide to segment your portal approach, using 'high touch' or resource intensive approaches for patients who are at higher risk/ need, and lower touch (and perhaps higher tech) approaches for lower risk.

Highest Risk or Need

(~10%) May need high-touch care coordination, and frequent one-on-one interaction, may be less able to adopt portal.

Medium Risk or Need

(~30-40%) May need outreach for coordinated care for stable conditions; may be better able to adopt portal with some assistance.

Lower Risk or Need

(~50%) Focused on coordination and prevention, more likely to have minor health issues. Virtual/mobile access appropriate, including self-service.



By providing useful services through the patient portal for those who can access them, you are freeing up clinic resources for other patient needs.

The portal is not going to work for everyone, but if those who are able to access and use it do so consistently and find value in it, then it will allow resources to be leveraged elsewhere.



Myth Busting: Older Patients and the Pt Portal

Older Patients' Interest in Patient Portal

- Older adults perceive the portal as useful
- Older adults report that they intend to use the portal
- Older adults see general convenience of the portal for simple tasks and medical history, but prefer human contact for questions.
- Older adults appreciate current features and are excited about the possibility.
- Older people and their families are interested in online resources such as medication lists, provider rosters, clinicians' encounter notes and guides to community resources.

Older Patients' Experience Using Portals + Takeaways

- 43% have authorized someone else to access the portal on their behalf
 - **Takeaway:** Focusing on caregivers of older adults who are unable or unwilling to engage with portal on their own may be helpful; “health supporters” such as adult children are willing and able to help but often feel left out by both patients and providers.
- Many older adults are uncomfortable with electronic interactions substituting for a phone call or in-person conversation.
 - **Takeaway:** Be clear with patients that the portal doesn't *substitute* for visits, but rather *supplements* visits.
- Older adults are quickly discouraged by slow response time, usability issues (such as login troubles), or unmet expectations (such as features mentioned not clearly accessible).
 - **Takeaway:** It's very important to only make features that you are prepared to manage available to patients, and clearly communicate what they will see or receive through the portal.



These examples are specific to older adults, but the takeaways are likely applicable to other groups and staff too!

Everyone will benefit from clear expectations, manageable information flow, and consistently implemented processes. If patients are instructed that they can message their provider through the portal, then it's important that they receive a response in the agreed upon timeframe. Similarly, if a patient completes a pre-visit questionnaire through the portal, then that should be apparent and available to the care team so a nurse or intake staff duplicate that effort.



Example of Maximizing Portal Use

Novant Health is a 2,300 provider organization in the Southeast US. In recent years, they've rapidly ramped up use of the patient portal from 0 in 2012 over **two-thirds** of primary care patients using the portal in 2018. **Their three pronged approach:**

Pre-Login

Create a **pre-login** experience for patients

- Create value on landing page with info pts want
- Find a provider (to have a video visit with!)

Post-Login

Create a **post-login** experience for patients

- Request med refill
- Video visits
- Messaging with provider after visit
- Test results

Alignment

Align portal usage with other org goals

- Remote screenings
- Close care gaps
- Sending important information (e.g., f/u, results)

Patients like portals, and we can too!



Patients like portals.

In 2017, half of Americans were offered access to an online medical record. **8 in 10** individuals who accessed their record reported it was both easy to understand and useful.

3

- Those who use portals effectively, both patients and providers, find them to be helpful.
- As we have discussed today, there are important considerations:
 - Select a limited set of high impact features to roll out, don't try to do it all at once.
 - Consider what features will support existing goals or initiatives.
 - Dedicate resources to pain points, knowing that everyone will realize value once you've overcome those challenges.
 - Accept that the portal won't work for everyone, it doesn't have to!



What questions do you have based on what we have discussed?



What is one thing you will do as a result of what we have discussed today?

Questions? Feedback?



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