

HEALTH INFORMATION TECHNOLOGY,

**HIT EQ**

EVALUATION, AND QUALITY CENTER

**Patient Portal Optimization Peer Learning Series**

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**Session 2: October 27, 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](http://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

# Part Two of Four Part Series

Patient Portal  
Optimization

Patient Portal  
Functionality

Patient Portal Training  
Recommendations

Patient and Staff  
Feedback

1

In this first session we discussed the benefits of and how to optimize the patient portal. The patient portal can be used to increase patient engagement, align and assist with other organizational goals, and improve communication with patients. This session will also provide ways to incorporate portal use into the health center workflows.

2

**Today's session** will discuss how to increase the functionality of the patient portal and will provide considerations when it comes to the policies and procedures in the health centers. Functionalities that are available and the impact they can have on the organization will be discussed. We invite you to share successes and failures with patient portal features.

3

During the third session, we will learn how to develop training materials for staff on portal functionality and how to explain the benefits of the portal to patients. This session will provide simple, clear talking points and instructions for the patient portal that staff can review with the patient.

4

In this final session, we will discuss how to gather patient and staff feedback regarding patient portal use and how to use that feedback to improve the patient experience. There will be opportunity to hear from peers on challenges patients have accessing their health data and begin to explore ways to enhance patient communication.



# **SESSION 2**

## **Patient Portal Functionality**

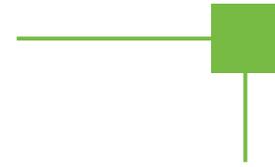


# Today's Discussion

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- Overview of portal functionality use across GPHDN
- General considerations for portal functionality
- Considerations for specific functionalities
- Planning for rollout of functionality
- Processes to support rollout of new functionality
- Closing Discussion





# Jillian Maccini, MBA, PCMH CCE

HITEQ Project Director

Health Center Supporter | Overall Data Lover

# Attendees of this session will be able to...

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1

Identify one or more portal functionality commonly used by peers.

2

Describe one or more considerations when enabling portal functionality.

3

Describe at least one health center process needed to support portal.



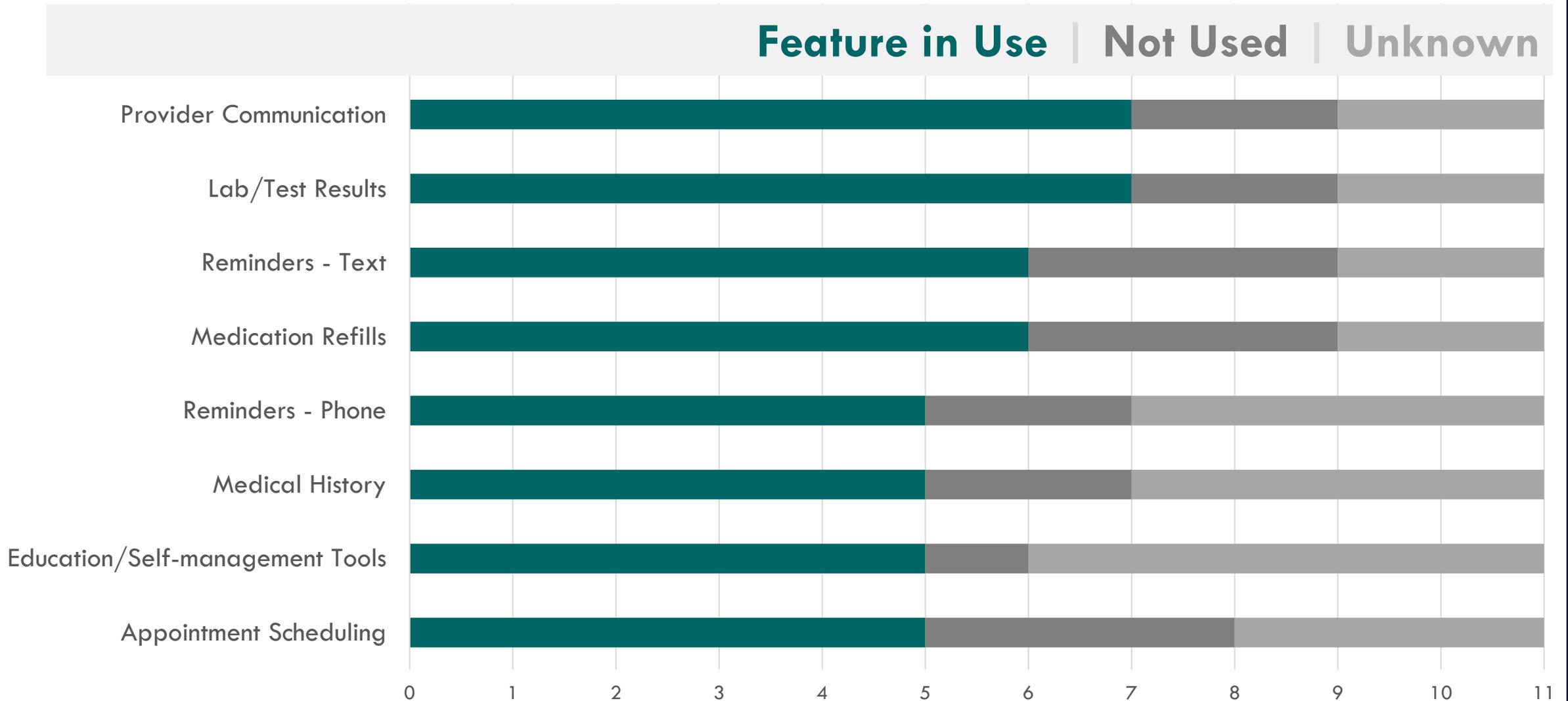
# PORTAL USE ACROSS GPHDN

A Snapshot of Features

# What portal functionality exists?

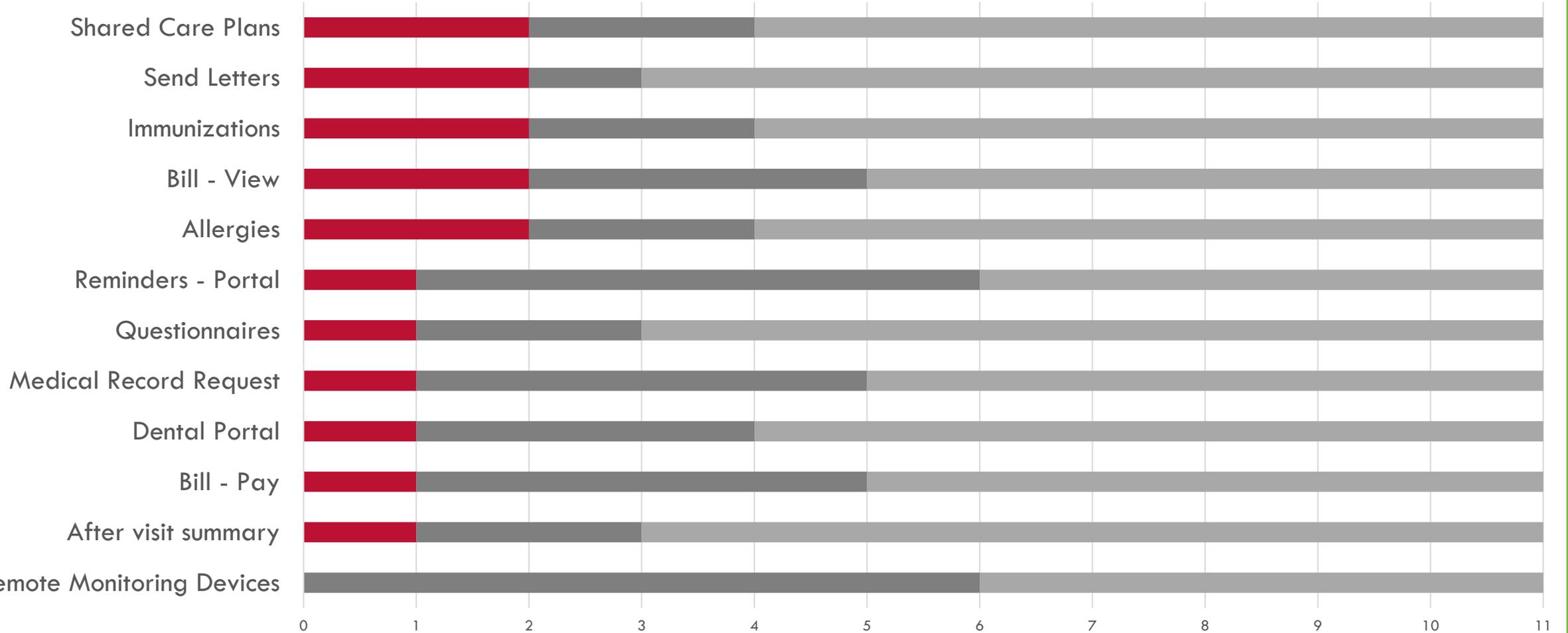
 After visit summary	 Allergies	 Appointment Scheduling	 Bill - Pay	 Bill - View	 Dental Portal
 Education/ self-mgt tools	 Immunizations	 Lab/Test Results	 Medical History	 Medical Record Request	 Medication Refills
 Provider Communication	 Questionnaires	 Reminders	 Remote Monitoring Devices	 Send Letters	 Shared Care Plans

# Portal Features Commonly Used in GPHDN Health Centers



# Portal Features **NOT** Commonly Used in GPHDN Health Centers

**Feature in Use** | Not Used | Unknown





More than **80%**  
of GPHDN Health  
Centers report  
that **at least one**  
**portal feature** has  
been  
implemented.



### **Most Common**

- Provider communication
- Lab/ Test Results
- Medication refills
- Medical History

### **Least Common**

- Questionnaires
- Medical Records Request
- Bill Pay
- After Visit Summary
- Remote Monitoring



# **PATIENT CONSIDERATIONS ACROSS FUNCTIONALITY**

The Basis for Adoption

# Patients Need to have Access to the Portal

## Promote on Website

Include a **link to web portal**

Include information about **downloading portal** app

- Include both iPhone and Android

Post **instructions** to access

- In multiple languages if needed for your population

## Assess Capacity to use Portal

What portion of health center patients have **technology and ability** to use the portal?

- Access to technology
- Digital literacy

# Promote on Health Center Website, Example 1



Cambiar a [Español](#)

## Welcome to Community Health & Wellness Partners

Our Patient Portal facilitates better communication with your physician's office by providing convenient 24 x 7 access from the comfort and privacy of your own home or office.



### healow

Access your health records through the healow mobile app

DOWNLOAD THE FREE HEALOW APP



Find us using our unique practice code on the healow app

DHIDAD

## Book an appointment with your doctor

Powered by healow

Sort By: [First Name](#)



CHWP Clinic  
Bellefontaine  
Community Health  
Center

212 E COLUMBUS AVE STE 1,  
340B00140900CH,  
BELLEFONTAINE, OH 43311

[Book an appointment](#)

## LOGIN TO YOUR ACCOUNT

We will send verification code to confirm access to this number.  
Standard text messaging rates apply.

[Using Mobile Phone](#)

OR

Enter the details below

[Trouble logging in](#)

[Login](#)

# Promote on Health Center Website, Example 2

Step-by-step instructions on video visits using FollowMyHealth from either a web browser (Desktop) or from Mobile device are provided below:

- [Mobile Application Step by Step Directions \(Instrucciones en Espanol\)](#)
- [Desktop Step by Step Direction \(Instrucciones en Espanol\)](#)

Instructions for mobile access and desktop access, in both English and Spanish. Can include this link in text reminders to patient or print out.

**Download the FollowMyHealth App**

Primero asegúrese de haber descargado la aplicación móvil FollowMyHealth. Está disponible para dispositivos iOS y android.

GET IT ON Google Play Available on the App Store

**Alice Scripts**  
Female, 32  
5' 5" HEIGHT 128.0 lbs WEIGHT 100 / 55 BP  
ASHWORTH DRUGS, INC. MAINE  
Cigna

**Action Center**  
Setup a Mobile Passcode to sign in faster.  
You have 97 unread emails in your mailbox.  
You have 3 unpaid bill.

**Recent Activity**  
FMH-QAR-PROPM1 added 1 notes to your record. 6/21/2017  
You added Glucose BldC-mCnc to your health record.

**Recent Activity**  
You have 2 unread emails in your mailbox.  
Your health record contains new clinical items.  
Reminder: Bun is overdue.

Quick video illustration of accessing the portal.

# Assessing Patient Capacity to Use Portal

## Digital Access

Access to device? Skills using device? Access to internet, and if so, what type? Preferred communication method. If no to any, then why not?

## Digital Health Literacy

How do you get general health information? For what purpose do you access online health info? Ever used electronic device to monitor health?

## Patient Preference

Ever used a portal? If no, why not? Do you feel the portal is useful? Why or why not? Frequency of use and most desired features.

## Barriers

What, if any, problems have you faced with using portal? Do you feel comfortable accessing your health record online? If no, why not?

## Demographics

Age, Gender, Race, Ethnicity, ZIP, Language, Education attained



# **IMPLEMENTING PORTAL FUNCTIONALITY**

Benefits, Process Considerations, and EHR Setup

# Most and Least Commonly Used Features

## **MOST COMMON**

- Provider communication
- Lab/ Test Results
- Medication refills
- Medical History

## **Least Common**

- Questionnaires
- Medical Records Request
- Bill Pay
- After-Visit Summary
- Remote Monitoring

**What similarities do you see across these common portal functionalities?**

**What similarities do you see across these less common portal functionalities?**

# Portal Success: Provider Communication

## PROVIDER COMMUNICATION

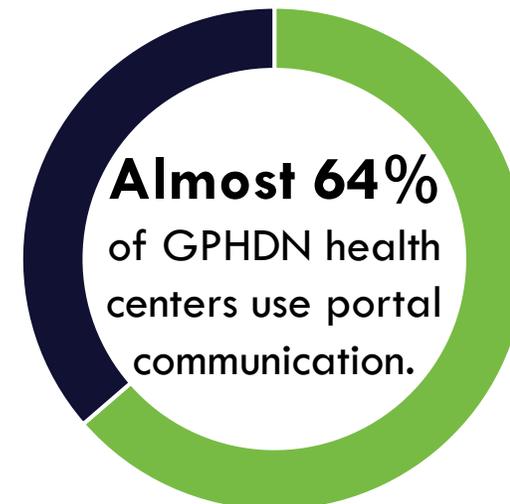
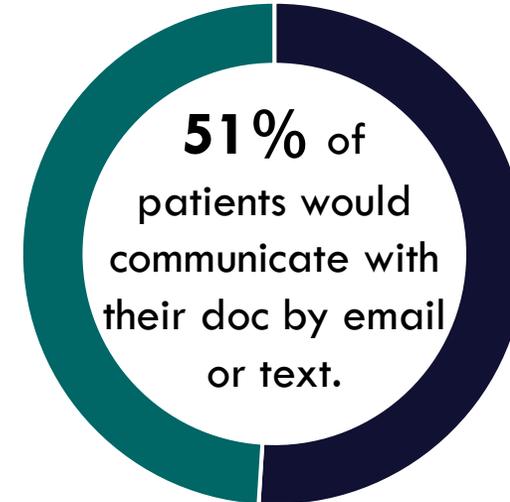
**Benefits:** Reduced call volume and less phone tag, freeing staff up to do other calls or tasks. Also provides a message trail that can be reviewed.

**Supporting factors:** Good reporting available (such as mgs sent and received) and desired by patients.

## Process Needed

**Workflow:** Determine which providers or facilities will accept messages and who each type of message will be routed to. Agree on required response times.

**EHR Setup:** Set up message routing by both identifying which sites/ providers accept messages and then assign messages to route to selected staff.



# Setting Up Provider Communication

Setting up provider communication often has options for setting up and routing general messages as well as messages related to appt requests, med refills, demographics or questionnaires, etc.

The image displays two overlapping screenshots. The primary screenshot is a web-based 'Patient Portal Settings' interface. It features a left-hand navigation menu with categories like 'Settings', 'Message Routing', 'Default Msg Names', 'Facility Accessibility Options', 'Provider Accessibility Options', 'E-mail Message Settings', 'Appointment Settings', 'Appointment Visit Type configuration', 'Labs Settings', 'Form(Ques &Imm) Settings', 'Menu Settings', 'Consent Form Settings', and 'Welcome Message Setting'. The main content area is titled 'Patient Portal Settings' and includes a 'Batch web Enable/Disable' button. Below this, there are dropdown menus for 'Facility : Default' and 'Message Ro...'. A 'Select Provider' section contains a 'Provider: Default' dropdown. A table titled 'Select the staff Responsible for handling the specific web portal messages.' lists various message types and their assigned staff members.

Message Type	Responsible Staff Member
General Messages	Willis, Sam
Refill Messages	Willis, Sam
Appointment Messages	Willis, Sam
Referral Messages	Willis, Sam
Lab Messages	Willis, Sam
Demographics Update Messages	Willis, Sam
Forms(Questionnaire/Immunization) Assigned To:	Willis, Sam

A 'Save' button is located at the bottom right of the settings panel. The secondary screenshot, partially visible on the right, shows the 'MyChart' mobile app interface with a 'Patient Name' field and a grid of activity icons including 'Next Results', 'Messages', 'Appointments', 'Medications', 'To Do', 'Find Care Now', 'Health Summary', 'Billing', 'Estimates', 'Settings', 'Questionnaires', and 'Track My Record'.

# Portal Success: Medication Refills

## MEDICATION REFILLS

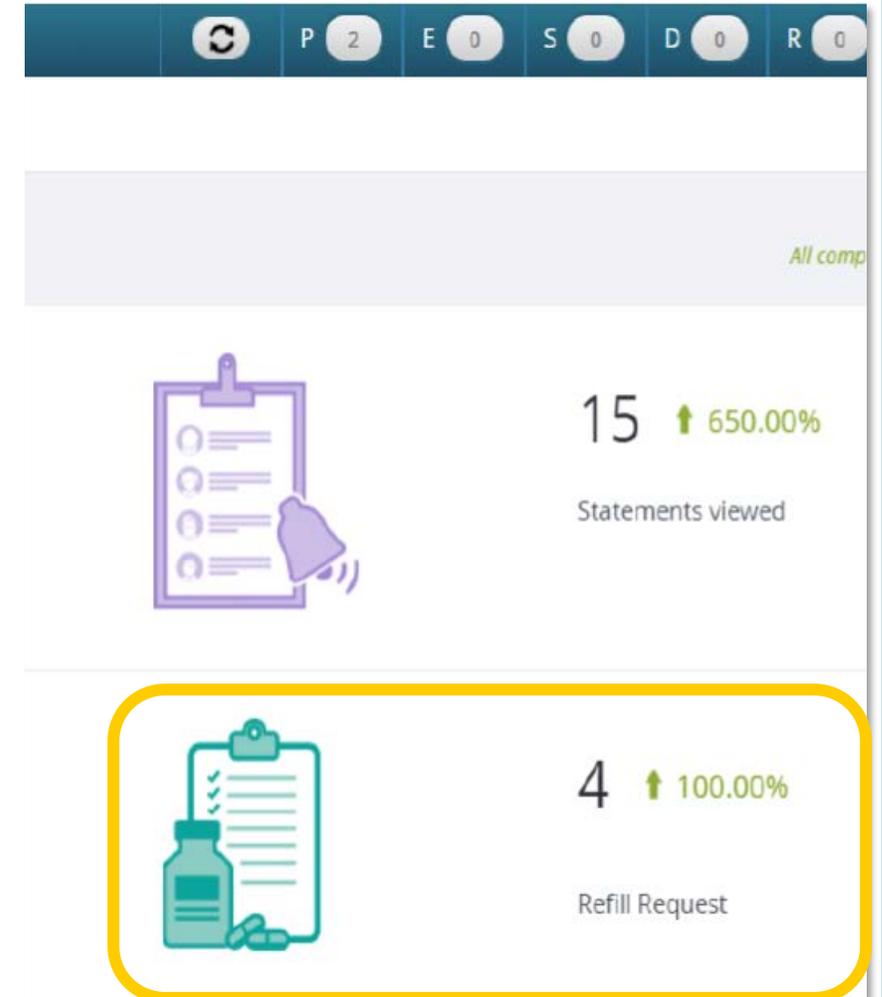
**Benefits:** Reduced call volume and less phone tag, clarity as to who is requesting information. Ability to batch requests. Creates a record of requests.

**Supporting factors:** Good reporting, generally good functionality, clarity of request, and desired by patients!

## Process Needed

**Workflow:** Determine which providers or facilities will offer medication refills through the portal, who on the care team will manage that process. Plan for monitoring.

**EHR Setup:** Enable medication refill functionality by site/facility and provider, then set who those refill requests go to for each. Set up message that is sent when refill request is fulfilled.



# Portal Success: Lab and Test Results

## Lab and Test Results

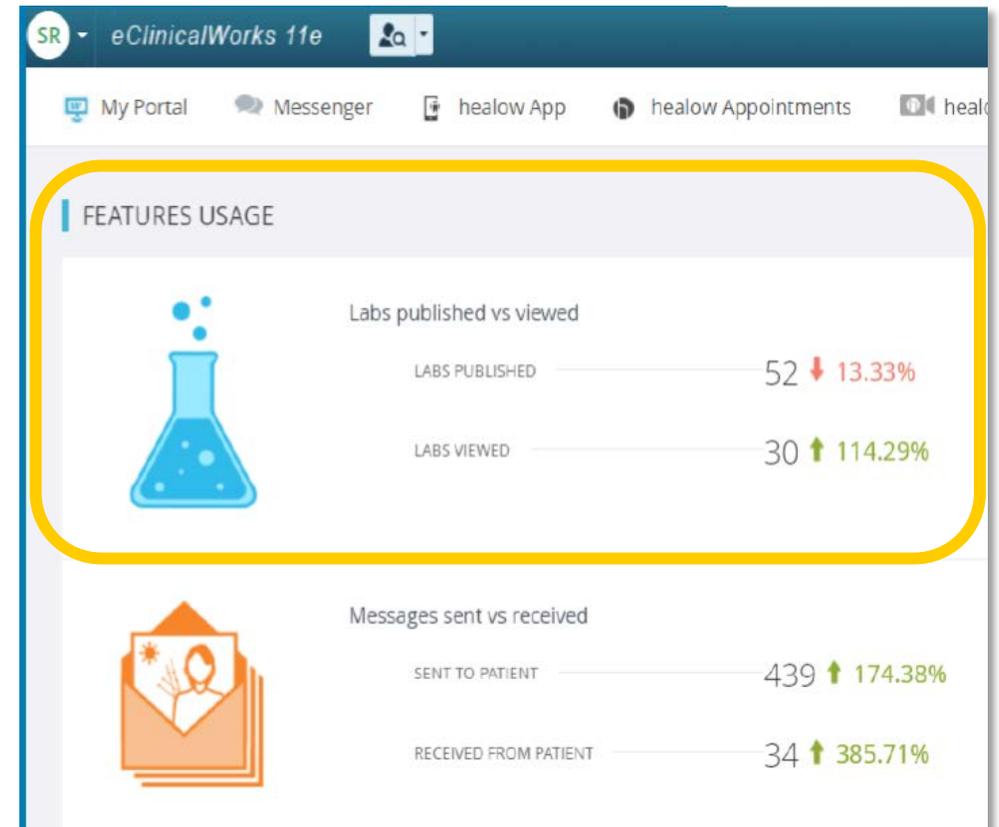
**Benefits:** Reduced burden on nurses to call patients with test results, can meet PCMH requirements to communicate lab and imaging results to patients.

**Supporting factors:** Good reporting, aligned incentives, able to set as default.

## Process Needed

**Workflow:** Determine which providers or facilities will push results to the portal, whether that will be done by default, who on the care team will receive messages related to labs/ results. Manage patient expectations.

**EHR Setup:** Set defaults for publishing labs and results to portal, including setting what detail is included (e.g., include notes or not), then monitor whether labs are viewed.



# Example of Managing Patient Expectations



**Test and Lab Results: We review all lab results before posting them. We will contact you before results are posted if there is anything urgent to discuss.**

- Sometimes results may appear abnormal but are not truly meaningful for your health. Other results may be only mildly abnormal and can be discussed at your upcoming visit. If you notice a result that seems significantly abnormal and you were not contacted, please message your provider through the portal. For milder abnormalities, please bring your question to your next visit.
- **Regarding hepatitis testing:** A reactive hepatitis result does not necessarily mean you have hepatitis. Often it simply means you are immune to hepatitis which is a good thing. A non-reactive test means you are negative AND non-immune. In this case, people at risk may want to be vaccinated to prevent infection. Please contact the clinic if you have further questions or would like to arrange vaccination.
- **Regarding syphilis testing:** If you have ever had Syphilis, a REACTIVE RPR does not necessarily mean you have a new infection. You will be receiving a call from The Center if this is a new infection.

# Portal Success: Reminders + Education

## REMINDERS AND EDUCATION

**Benefits:** The patient portal can be used to remind patients that they are due or overdue for recommended vaccines or vaccine doses. The portal can also be used to keep the patient's health record updated with vaccines received outside of the practice; for example, at a pharmacy. Use of the patient portal may improve health care quality, such as by increasing vaccination rates.

**Supporting factors:** Ability to use patient filters like order status diagnosis code, etc. to create patient groups.

The screenshot displays the 'Campaign Builder' interface. At the top, there are tabs for 'Campaign Type', 'Patient Filters', 'Patients', 'Message', 'Schedule', and 'Preview'. Below these, it shows 'Campaign Type: Custom - Single instance' and a note: 'Select from the filters below to determine which patients will receive your message. Note: Campaign messages are only sent to active patients.' A navigation bar includes 'athenaNet' and various menu items like 'Calendar', 'Patients', 'Claims', 'Financials', 'Reports', 'Quality', and 'Support'. The main content area is titled 'Campaign Builder: Product X 2nd Dose Reminder' and contains a disclaimer: 'Your practice is responsible for ensuring that the content of this communication complies with all applicable law. Accordingly, by entering content into the instructional Message field, you are affirming that the requisite level of consent has been obtained for all subsequent and related patient communications. Practices are prohibited from using this functionality for debt collection purposes or for marketing purposes.' Under 'Message types', 'Email' is selected, with 'Secure portal message' chosen. 'Secure Portal Message Settings' are visible, along with an 'Instructional message' field containing the text: 'Vaccine Reminder Product X Portal Message', 'This is a message from', 'The following is an important message for', 'Our records show that you may be due or overdue for your 2nd dose of Product X vaccine. Please schedule an appointment as soon as possible. If you have received the vaccine at another facility (for example your pharmacy), please reply with details about when and where it was given. To replay these instructions, please press 9 on your telephone keypad.' At the bottom, there are 'Back', 'Cancel', 'Save and Exit', and 'Continue' buttons.

# Middle of the Road Adoption: Appointment Reminders

## APPOINTMENT REMINDERS

**Benefits:** Can take the burden off staff making reminder calls, depending on the portal can tailor when and how the reminder is sent.

**Supporting factors:** May reduce no-shows, can support ROI on portal

## PROCESS NEEDED

**Workflow:** Determine how you want to send reminders (phone, phone and text, etc.), how far in advance, and what you want the confirmation settings to be, who will handle rescheduling.

**EHR Setup:** Set up when and how reminders will be sent, set up template for phone/ text/ portal reminders, as required. Set up confirmation settings.

## ROI Consideration:

**Step 1.** Determine average receipts per visit (can split further per site or per provider).

**Step 2.** Determine average no show or cancelled appts w/o rescheduling per week.

**Step 3.** Implement portal appt reminders.

**Step 4.** After implementation is complete and relatively widely adopted, determine average no show/ cancelled w/o rescheduling per wk.

**Step 5.** Take the difference between Step 2 and Step 4 (5.5 appts-3 appts= 1.5 visits) and multiply by average receipts per visit (1.5 \* \$112= \$168)

# Setting Up Appointment Reminders

The image shows a screenshot of the eClinicalWorks 11e Messenger interface, specifically the 'Global Settings' tab. The interface is divided into several sections:

- Global Settings:** Includes fields for 'Restricted messaging hours (Format : 8PM-7AM)', 'Voice gender' (Female/Male), 'Operator #' (555-555-5555), 'Send appt reminder # days in advance (Voice)' (1), 'Send appt reminder # days in advance (SMS)' (1), 'Facility name' (Missouri Medical C...), 'Caller ID #' (555-555-5555), 'Facility phone number' (Use as Operator), and 'Greeting message(English)' and 'Greeting message(Spanish)'.
- Specify day to send reminder:** A dialog box with a title bar and a close button. It contains a checkbox for 'Enable advanced functionality' (checked) and a section for 'Send multiple reminders for the' with a list of days and corresponding reminder counts: 'For Monday Appointments send', 'For Tuesday Appointments send', 'For Wednesday Appointments s', 'For Thursday Appointments ser', 'For Friday Appointments send r', 'For Saturday Appointments sen', and 'For Sunday Appointments send'.
- Visit Type Mapping:** A dialog box with a title bar and a close button. It contains a 'Note: Templates and settings from the Visit Status Mapping take precedence over similar settings from the Global Settings.' and a 'Visit Type' dropdown menu. Below this is a 'Select Templates' dialog box with a close button, containing several empty text input fields for templates: 'Appointment message template(English)', 'Appointment SMS/TEXT template(English)', 'Appointment message template(Spanish)', 'Appointment SMS/TEXT template(Spanish)', and 'Appointment machine template(English)'.

# Varied Adoption: Allergies, Medication, etc.

## ALLERGIES, MEDICATION, PROBLEMS, ETC.

**Benefits:** May allow patients to share information from other providers (e.g., medication prescribed elsewhere).

**Supporting factors:** Can improve understanding of full scope of patient condition.

**Considerations:** Reconciling information will be of paramount importance.

**Determine who will review and reconcile any information added through the portal. Here is one example:**

New Information	Care Team Staff	Provider
Medications	X	
Allergies	X	
Problems		X

# What is your experience?



- Why are you **not** using **questionnaires** through the portal?
- Why are you **not** using the portal to provide an **After-Visit Summary**?
- Why are you **not** supporting **medical records requests** through the portal?

# Opportunity for Adoption: Medical Records Request

## “Right of Access”– HIPAA requirement

- In providing access to the individual, a covered entity must provide access to the PHI requested, in whole, or in part (if certain access may be denied as allowed), no later than 30 calendar days from receiving the individual’s request. [...] The 30 calendar days is an outer limit and covered entities are encouraged to respond as soon as possible.<sup>1</sup>
- Recently we have seen health centers be fined by the office of civil rights for not meeting providing timely access to patient records upon request.<sup>2</sup>

Patient Portal can assist with this! Patients may be able to **submit their request their records this way, which can rout the request to the appropriate staff.** Making the patient aware of the availability of electronic data, and options for access their health information for the portal may 1. decrease overall requests for the patient’s whole record (e.g., if they can access the information they desire without a separate request) and 2. allow a secure way for the patient to download their full record.

1. <https://www.hhs.gov/hipaa/for-professionals/privacy/guidance/access/index.html>; 2. <https://healthitsecurity.com/news/ocr-settles-with-5-providers-over-hipaa-right-of-access-violation>

# Opportunity for Adoption: Questionnaires

## **Moving forms historically done in the waiting room to the portal:**

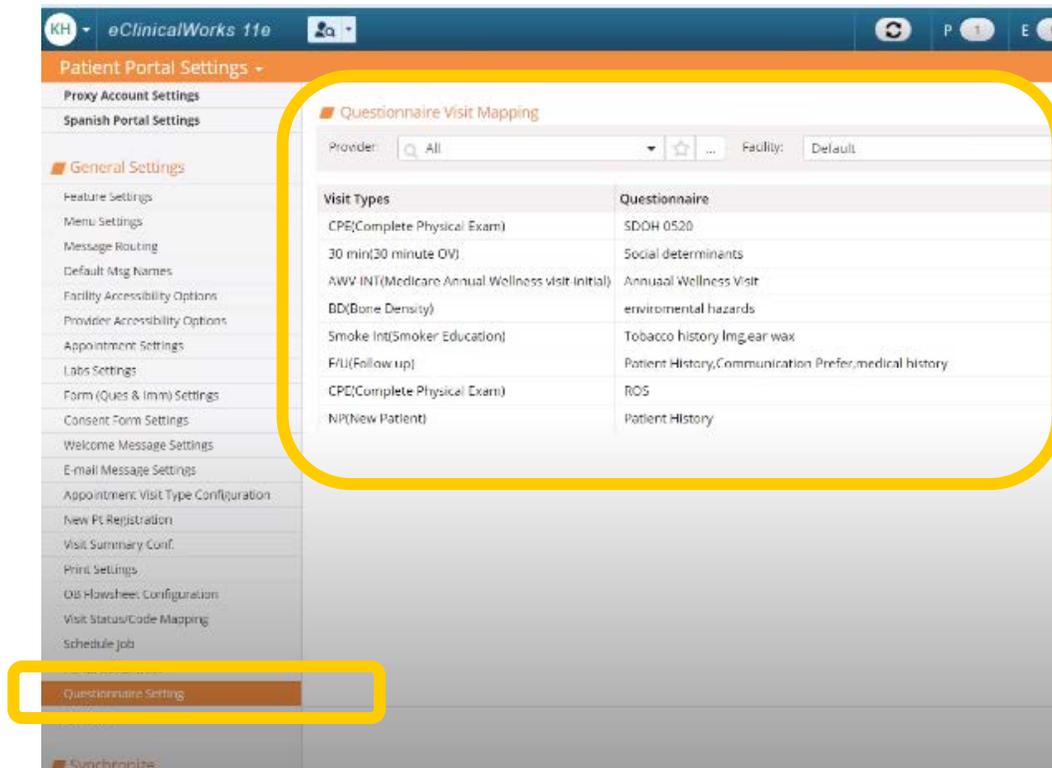
- Insurance and ID
- Consent forms
- New patient information
- Demographic information
- Pre-visit screenings
  - SDoH
  - PHQ-9

**Workflow:** When visit is scheduled, questionnaires are pushed to the patient portal based on visit type based on determined time and visit type. A process is needed for following up if the questionnaires are not completed in advance of the visit (e.g., phone screen), similarly, a process is needed for if the patient completes questionnaires and then no-shows.

**EHR Setup:** Questionnaires need to be set up and published, then linked to specific visit types. Determine notifications and timing.

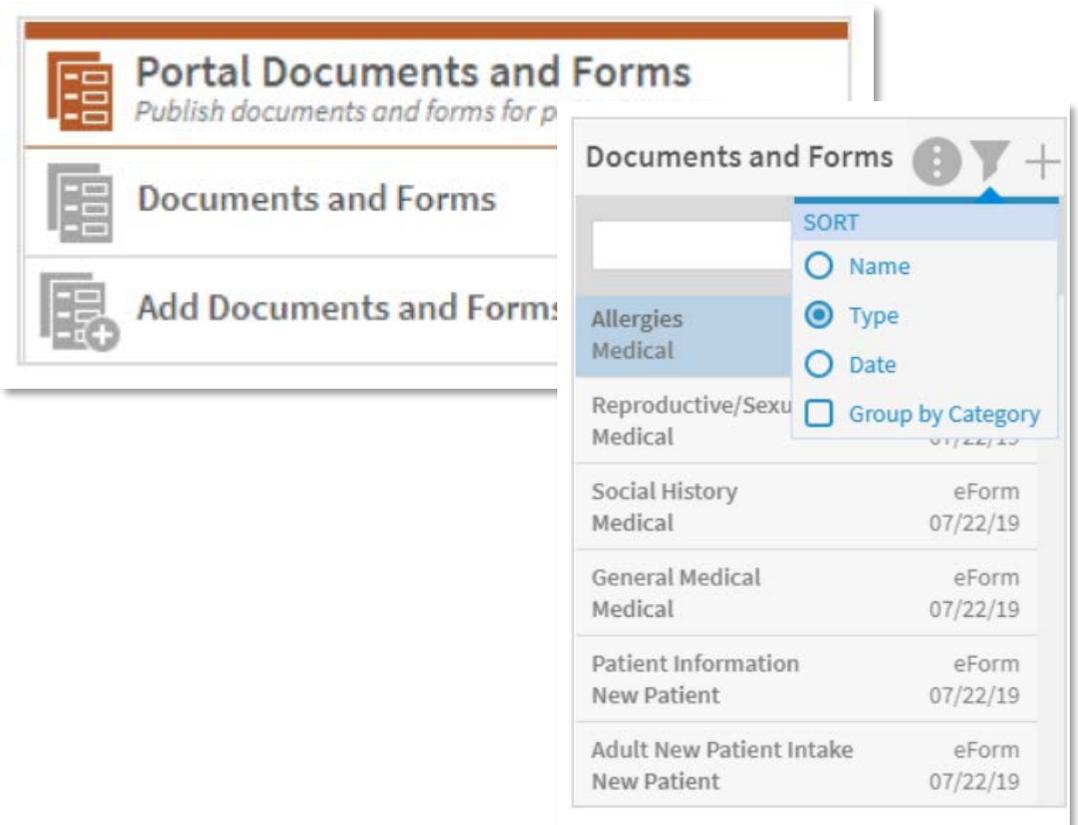
# Helpful Resources for Implementing Questionnaires

Several trainings about setting up questionnaires in eClinicalWorks are available. Cenevia has one titled [Creating questionnaires to capture social determinants of health in eCW](#) that walks you through the process.

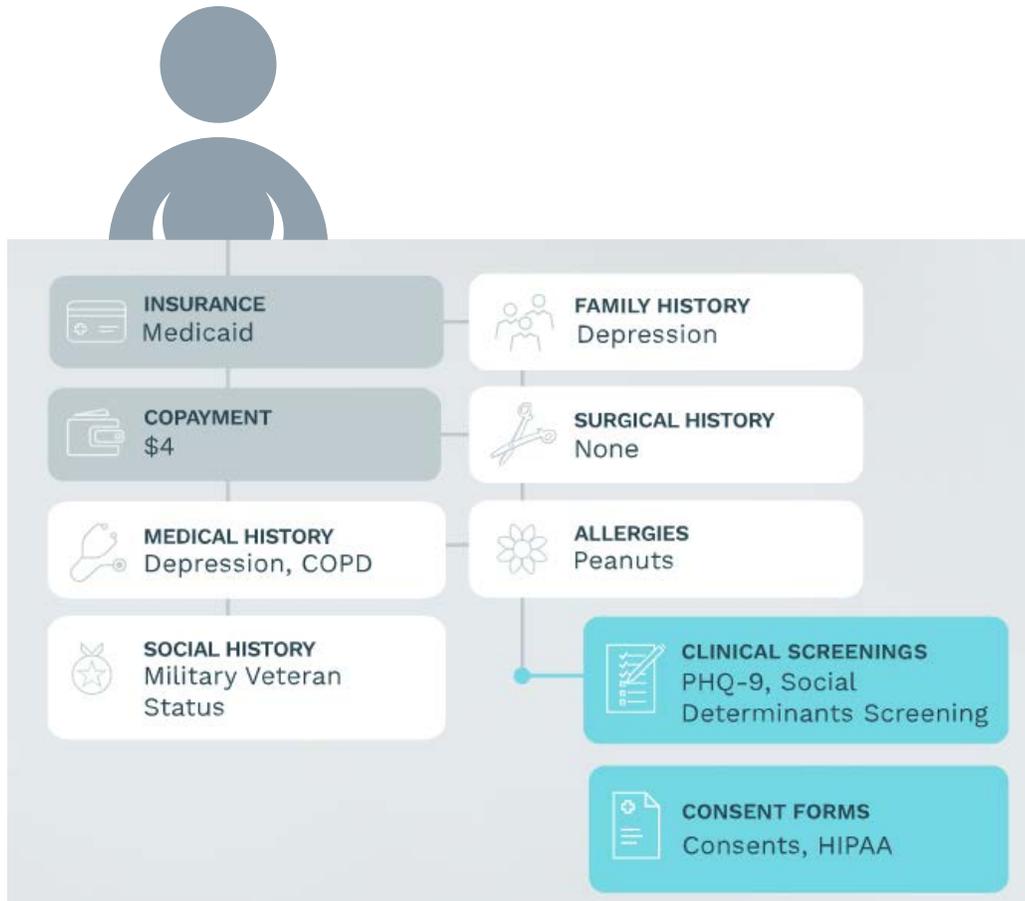


Greenway Instruction for Setting Up and Using eForms: <https://patient.greenwayhelp.com/eForms.htm>

No custom forms at this time (per their website), but there are several pre-programmed eForms.



# Valuable questionnaires to make electronic?



- Enabling questionnaires in the EHR can help complete the information in the patient record.
- Some tools allow health centers to **only ask for that information that requires updating or that is missing.** This is ideal for patient experience.
- Need to ensure that workflow is updated to **review information submitted and follow up as needed,** rather than duplicating efforts.

# Opportunity for (Re)Adoption: After Visit Summary

After Visit Summary was required for Meaningful Use. Since then some prompts to send the patient the summary have gone away. But there are still benefits!

**Benefits:** Reinforces ability of patients to remember, and, if necessary, convey to caregivers details of the visit. Supports greater patient engagement in around healthy behaviors and self-management of chronic conditions, which is essential to improving quality outcomes. Improves the quality of information in the EHR through transparency, by giving patients/ caregivers an opportunity to see information in their records so they can identify and correct data errors.

**Considerations:** Missing information must be identified and updated in the EHR throughout the patient interaction in order for the after-visit summary to be accurate and up-to-date when pushed to the portal.

# Other Portal Functionality

 After visit summary	 Allergies	 Appointment Scheduling	 Bill - Pay	 Bill - View	 Dental Portal
 Education/ self-mgt tools	 Immunizations	 Lab/Test Results	 Medical History	 Medical Record Request	 Medication Refills
 Provider Communication	 Questionnaires	 Reminders	 Remote Monitoring Devices	 Send Letters	 Shared Care Plans



# **BENEFICIAL FUNCTIONALITY**

Experiences Shared by Peers

# What Value Does the Portal Bring to your Clinic?

The greatest value comes from communication between patients and providers. Patients are able to directly message providers/RNs and their BH providers.

-- *GPHDN Member*

The communication to providers is usually screened via RNs if it's a medical question. BH pts can message their BH providers directly without the screening process. This increases response time for patient questions or concerns. This is something we had to set up via the EMR settings but it seems to work out reasonably well so far.

# What Value Does the Portal Bring to your Clinic?

Second would be their ability to see their My Health information on the portal. Labs, tests, etc. can be sent to the patient for their record and review in a secure manner over the portal.

-- *GPHDN Member*

We “push” the portal via check in and check out for patients to include a **Portal Handout** that informs patients how the portal may be able to help them contact their provider, receive their results, and pay their bills.

# What is your experience?



- What **value** does the portal bring to your clinic?
- How you have incorporated valuable features into your **workflows?**

# Patients Like Portal Features; We Can Too!

## It's growing!

In 2017, half of Americans were offered access to an online medical record.

## And it can be easy!

8 in 10 individuals who accessed their record reported it was both easy to understand and useful.

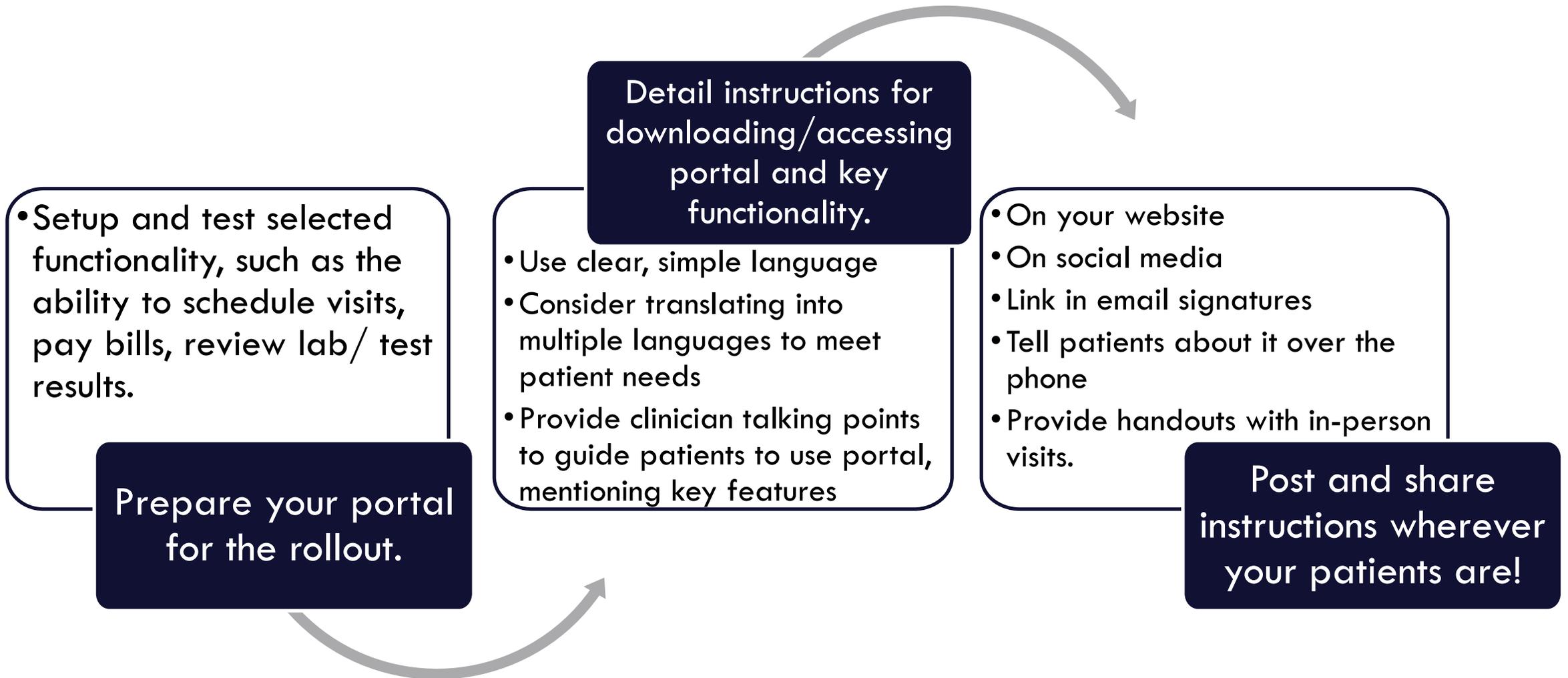
## Select your features

Select a limited set of high impact features to roll out; it is not necessary to do it all at once. Consider what features will support existing goals or challenges.

## Roll them out right

Dedicate resources to governance and set up, knowing that realizing value will come if those are handled well. Accept that the portal won't work for everyone, it doesn't have to!

# Portal Rollout: It's not just enable and go!





## **Next session we will talk about training to support the portal.**

During the third session, we will discuss how to develop training and materials for staff on portal functionality and how to explain the benefits of the portal to patients. This session will provide simple, clear talking points and instructions for the patient portal that staff can review with the patient.





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



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Phone: 1-844-305-7440

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