HEALTH INFORMATION TECHNOLOGY, HITEQ EVALUATION, AND QUALITY CENTER

Patient Portal Optimization Peer Learning Series

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,** 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.

JSI

Westat®

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 Three 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 3: Portal Training

Preparing Staff for Successful Portal Rollout

Nov. 19, 2020

Today's Discussion

- Finishing up from last session:

  – Planning for rollout of functionality

  – Processes to support rollout of new functionality

- Third Session: Training for Portal Success

  – Engaging staff in portal rollout

  – Identifying and creating materials for onboarding for staff and patients

  – Conducting portal training to create and sustain change

Jillian Maccini

HITEQ Project Director
Health Center Supporter | Overall Data Lover

Attendees of this session will be able to…

1 Identify one or more example(s) of helpful materials for portal rollout.

2 Describe one or more training consideration for training staff on the portal.

3 Describe at least one benefit key step in creating a training plan.

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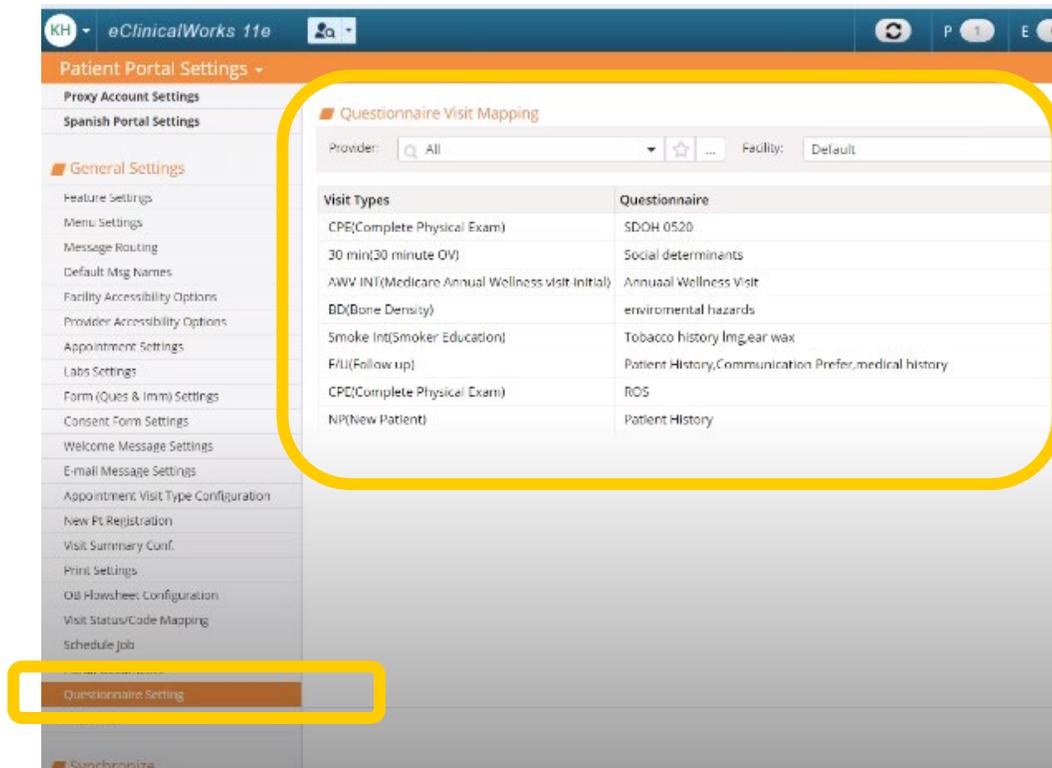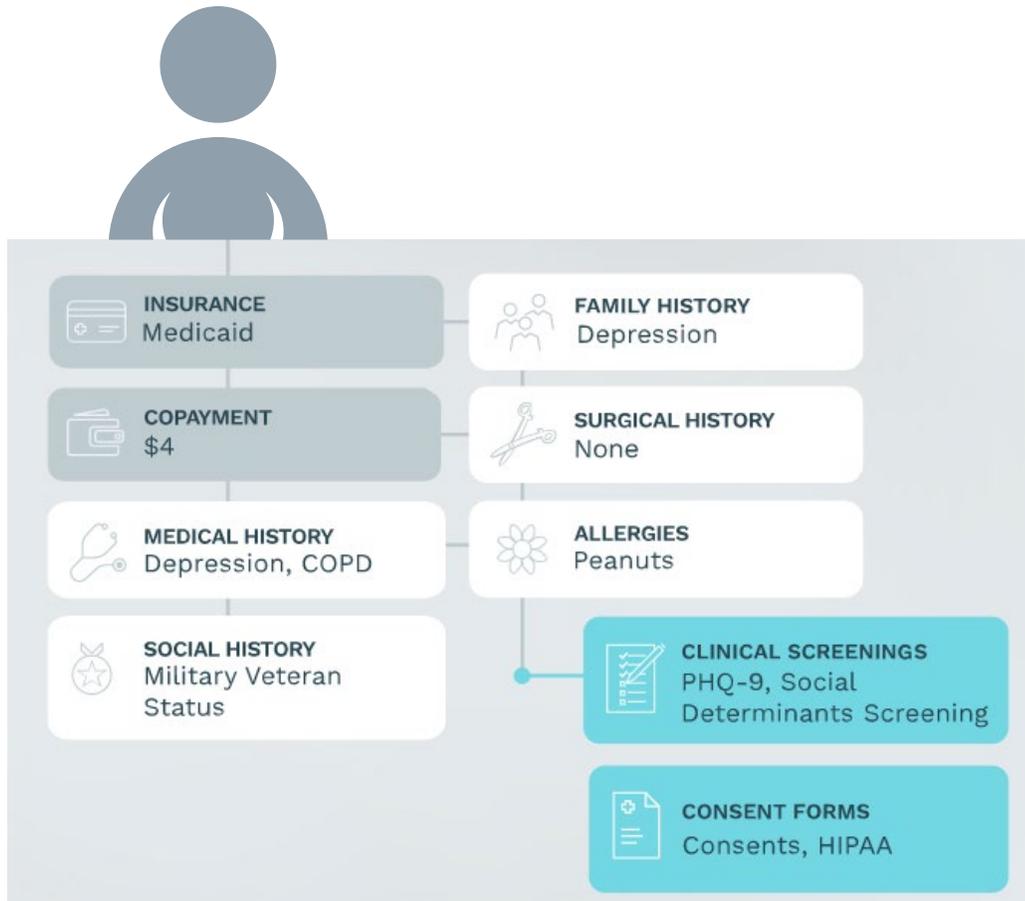
Greenway Instruction for Setting Up and Using eForms: https://patient.greenwayhelp.com/eForms.htm

No custom forms at this time (per their website), but there are several pre-programmed eForms.
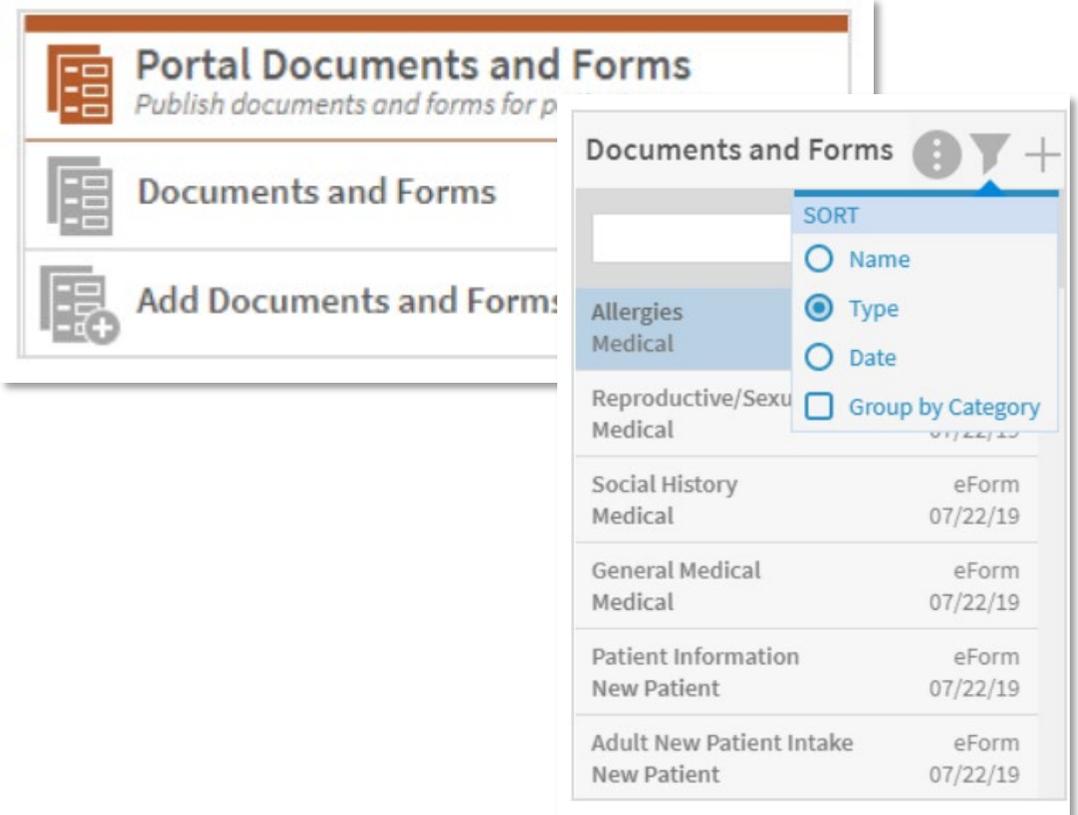
Valuable questionnaires to make electronic?

- 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.

Source and Helpful Reference: Providing Clinical Summaries to Patients after Each Office Visit: A Technical Guide

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.
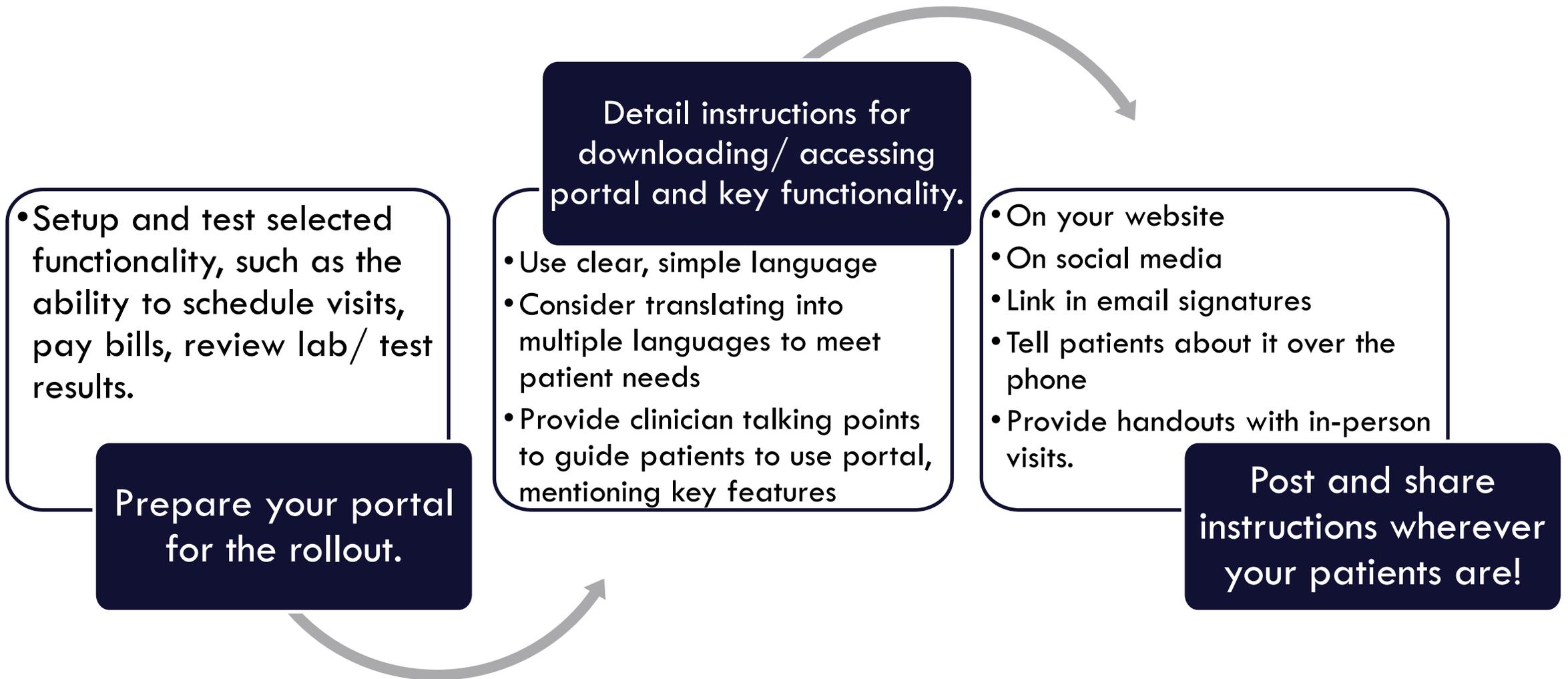
Select your features

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!

Source of patient specifics: https://www.healthit.gov/playbook/pe/full/

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

- Setup and test selected functionality, such as the ability to schedule visits, pay bills, review lab/ test results.

Prepare your portal for the rollout.

Detail instructions for downloading/ accessing portal and key functionality.

- Use clear, simple language
- Consider translating into multiple languages to meet patient needs
- Provide clinician talking points to guide patients to use portal, mentioning key features

- On your website
- On social media
- Link in email signatures
- Tell patients about it over the phone
- Provide handouts with in-person visits.

Post and share instructions wherever your patients are!

For the remainder of the third session we will talk about training to support the portal.

During the remainder of 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.

Successful Portal Training

Tips for Success

Applying Human Centered Design

Inspiration

Understand the needs of those involved, including what people hope to get out of portal usage and what their fears are. This will help you be more familiar with what will be needed to be successful.

Ideation

Take what you heard in the inspiration phase and identify opportunities to address them, then test those out. Test and refine the proposed solutions through iterative review with end users (staff, patients, etc.).

Implementation

Make it happen! Create an action plan, launch your portal rollout plan, including training. Be sure to keep getting feedback and iterating to ensure needs are met.

An Example from Another Health Center

Health center found it was taking 20-25 minutes to get someone set up in the portal, and then use was varied.

Health center surveyed patients and staff about what all their questions, concerns, and thoughts were.
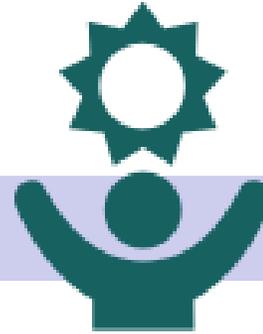
Health center pulled together tips, references, answers, and materials specific to the needs identified.

Health center provided regular training, on-boarding, and then regular in-services to reinforce and share experiences.

Keys to Successful Portal Training

Establish Value Proposition for All
Change is hard for everyone, particularly right now. In order to build any buy-in at all, it's critical that all stakeholders understand what is "in it for them".
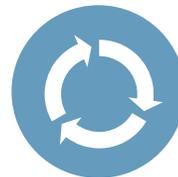
Compile Needed Training Materials
Challenges will arise. Having training and reference materials available allows those to be addressed more easily and consistently.

Provide Hands-on Person-Centered Training
A single portal webinar probably will not cut it. Plan training that is more dynamic and person-centered, to address the needs of staff and patients.

Reinforce, Reinforce, Reinforce!
As with all change, this is not one and done. Ongoing monitoring, reinforcing, and retraining will be needed. There will also likely be changes needed, plan for that!

Establish Value Proposition for All

Change is hard for everyone, particularly right now. In order to build any buy-in at all, it's critical that all stakeholders understand what is "in it for them".

Build it and they will come will *not* work with portal

What experiences have stakeholders had with the portal?

- Some staff may use a portal in their own life
- Some may have used one elsewhere

What concerns do they have?

- Many concerns are likely to center around 'whose job will this be?' and 'will this confuse patients or complicate things for them?'.

How do they see the portal incorporating into their work?

- Dig into this for everyone:
  - Nurses
  - Providers
  - Billing
  - Outreach/ case managers

Reminder of Portal Benefits

Increased Patient Engagement

- Patient portals offer the opportunity for **unified, longitudinal care management** through appt reminders, instructions, and medication refills.
- Improved **care continuity/ appropriateness and retention in care,** by allowing communication + scheduling.
- Allows for the patient's own voice.

Saves Time and Resources

- **Test, lab, radiology results** can be pushed to portal, lessening the need to call with results.
- **Intake/ screening** can be done through portal, lessening the need to call to conduct those.
- Respond to **messages through portal,** rather than answering voicemails at end of the day.
- **Clear record of communication,** reducing duplication.
- Patient self-scheduling.
- Record access for patients.
- Portal messages can be sent any time, reducing after hours calls.

Aligns with Organizational Goals

- **Decrease no shows** by sending appt reminders and getting patient confirmation.
- **Improve chronic care management** by enabling more timely prescription refills and sending reminders.
- Improved revenue
- **Improved patient information** by allowing and encouraging patients to update their own information, as appropriate.
- Assist with **reporting** req.

These benefits need to be clear to each stakeholder

- No one should think **that's what someone else is doing**, but rather, **this is what we are all doing**.

- By defining the benefits for each stakeholder (each staff role, department, leadership, and patients), everyone has **a reason** to make it work.

Value Proposition *(n):* A value proposition is a promise of value to be delivered, communicated, and acknowledged. It is also a belief about how value will be delivered, experienced and acquired.

Sample Value Propositions

LEADERSHIP

Use of the portal allows us to stay connected patients while also minimizing staff burden by automating processes. The portal also allows us to address key regulatory requirements, such as records requests and intake forms, in a consistent manner.

ADMINISTRATION

Use of the portal can both reduce call volume, and make calls that come in more productive, by letting patients know that when test results are available (for example), they will be in the portal and the patient will get an email. Similarly, when a patient calls about their bill, they can be referred to their bill in portal, so you can look at it together.

CLINICAL TEAMS

Use of the portal can reduce burden of callbacks and follow up, as well as automating important care gap reminders. Can provide important, consistent instructions or messaging to patients without taking additional care time.

Some EHR vendors have put a great deal of work into crafting strong messages communicating the benefits of the portal.
What have you seen or used?

Compile Needed Training Materials

Challenges will arise. Having training and reference materials available allows those to be addressed more easily and consistently.

Take what you learned in the last step and find answers!

- In defining the value proposition, you will likely hear lots of concerns and questions (and hopefully some good things too).
  - This will guide the identification of needed training materials and references.

In discussions with your teams, what have you heard from people about the portal?

Provide easily accessible training and guides

- Reference materials should include screenshots and step-by-step instructions about patient portal features.

- You'll need reference materials to reinforce training and support ongoing adoption, not just initial set up.

Key to Remember: There will likely be needs beyond just materials specific to technical aspects of the portal. For example, its not just how to sign up and sign in. Staff need to know what information is needed from a patient to sign up (so they don't get halfway through the process and find out they can't finish). Also, if the portal requires an email for example, materials to help patients sign up for an email will be needed. *With all that staff have on their plate, anticipating these ancillary needs will pay in dividends.*

Sample Materials

Talking Points

As we've discussed throughout, having quick, clear talking points for staff to use will be helpful.

"If you are not feeling better in a week, schedule a visit using the portal or send a message."

"When this prescription is almost out, you can request a refill through the portal."

Quick Reference Guide(s)

At least one for internal use (staff-focused) and one for external use (to provide to patients). Maximize the use of images, highlighting, and clear labelling. Also include a contact for any challenges.

Detailed Instructions

This manual or binder is where all the detail will be, including workflows, detailed instructions as to the who, what, where, when and how of the portal, as well as duties, and so forth. This should be as easy to navigate as possible (linked table of contents, tabs, etc.) and be kept up-to-date as changes are made, and should be available to everyone.

Materials for Patients with Limited Digital Literacy

As mentioned, materials needed may include building digital skills. Here are some helpful materials:

- [Public Library Association: Digital Learn Program](#) — This webpage has a collection of online tutorials covering computer and internet basics.
- [Telehealth Access for Seniors](#) — This webpage has multiple guides for digital literacy basics, including translation of guides into multiple languages.
- [Working with Patients with Limited Digital Literacy in Safety Net Settings](#) — This webpage has instructions for resetting passwords on smartphones as well as internet skill how-tos in English and Spanish.

Be sure training materials focus on training!

It is important to differentiate between **set up or configuration needs or issues** (things that IT or your EHR administrator will likely have to address) and **training needs** (things that clinical teams and other staff need to know).

Provide Hands-on Person-centered Training

A single portal webinar probably will not cut it. Plan training that is more dynamic and person-centered, to address the needs of staff and patients.

Offer trainings in a variety of formats

- **Consider different modalities to support different learning styles and needs:** Elevator speeches, talking points, job aids, cheat sheets, FAQs, and online presentations are effective delivery methods to educate your staff.

- **Consider tailored trainings for different groups, focused on the value proposition for each:**

Call Center or Outreach
Training: How to walk people through signing up, accessing, and finding information they are looking for in the portal.

Value: Reduced call volume, an answer for questions that are hard to answer otherwise (when will my results be in?)

Clinical Teams
Training: How and when to push information to the portal, establishing workflows to respond to portal messages and requests.

Value: Patient efficacy, key information readily available to patient, less voicemails and callbacks.

CLINICAL TEAMS
Use of the portal can reduce burden of callbacks and follow up, as well as automating important care gap reminders. Can provide important, consistent instructions or messaging to patients without taking additional care time.
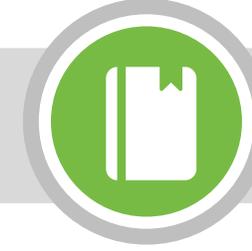
Sample Supplemental Training for Staff

Broad Training that includes Hands-On Application

Have everyone (really, everyone) sign up for and download the portal! Just having that initial experience will clarify a great deal. Then lay out a set of things that everyone should try in the portal or navigate to (may need to be through a test acct).

Lunch and Learn or In-services for Each Department or Staff Group

This is where we put the value proposition, talking points, materials, and changes specific to each team into action. Doing this by department may allow people in similar positions to learn from each other.

Regular Reminders of Portal Opportunities and Materials

Maybe each week, a reminder goes out via email and is shared in a meeting about a specific portal Functionality/benefit, along with links to materials to help promote it and successfully support use.

Why Supplemental Staff Training?

Your vendor likely offers general training on use and functionality. You should take advantage of that! These other trainings are to build buy-in and embed it in your processes.

+

IT may need to provide technical training (detailed training on the internal how-tos), obviously this is needed too!

Broad Training that includes Hands-On Application

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Sample Training Plan for Patients

Hands-On Sign Up Support

You may have already done this in the early MU days, but getting patients signed up and logged in is the first step. Typically, this would be in the waiting room or in-person, but right now, maybe it's by phone with the help of sending a link to instructions. Plan on 20 minutes and have all needed information ready.

Instructional Handout Spelling out Benefits and Opportunities

Probably the quick reference guide we discussed earlier along with a second page that simply spells our the benefits of the portal and what they can consider using it for. Maybe four key benefits and three key uses (keep it short).

Regular Reinforcement from All Staff

Whenever patients interact with the health center, it's a chance to recommend the portal! When appropriate, tell patients calling to schedule that they can schedule in the portal, tell patients that test/ lab results will come to the portal, send a note on the bill that they can pay through the portal. Provide handouts with in-person visits.

Reinforce, Reinforce, Reinforce!

As with all change, this is not one and done. Ongoing monitoring, reinforcing, and retraining will be needed. There will also likely be changes needed, plan for that!

Embedding Change

Standardize What Makes Sense	Portal become part of standard work, and standard workflow exists and updated for all those positions impacted.
Ensure accountability	Accountability for standardization is ensured through systems of routine review across every level of org. *Whoever is in charge of rollout, regularly follows up.*
Visual Management	Visual sharing of status of improvement. *Consider dashboards or other ways to share progress visually.*
Have problem-solving tools	Staff (particularly front line) have tools and bandwidth for addressing problems. *Think about the manual, digital literacy tools, etc.*
Escalating problems	Protocols exist for problems that cannot be solved at the front line to be escalated to the right level in the right time frame.
Integration across organization	Alignment across levels/ sites/ depts around goals and systems.

Source: http://www.ihi.org/resources/Pages/Publications/Ensuring-Health-Care-Improvements-Stick.aspx

Feedback Loops

Evidence

Relevance

Consequence

Action

Why do feedback loops work?

"…giving individuals a clear goal and a means to **evaluate their progress toward that goal** greatly increased the likelihood that they would achieve it."

"The true power of feedback loops is not to control people but to **give them control.**"

Harnessing the Power of Feedback Loops, Wired.com, 2011.

Example
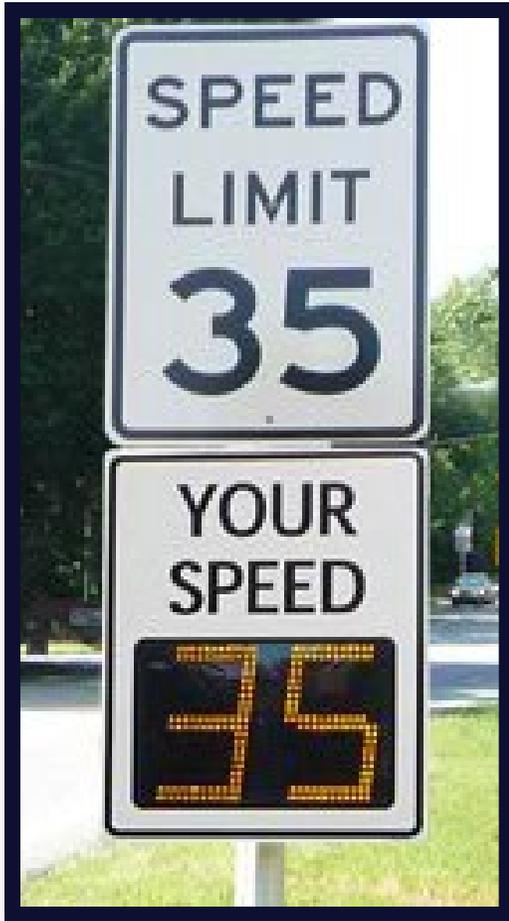
Raise your hand if you jump on your brakes when you see this.

Radar speed signs do not provide any information that is not freely available to the driver (all cars have speedometers!), but these signs have been shown to decrease speed for miles ahead.

Harnessing the Power of Feedback Loops, Wired.com, 2011.

Leveraging Feedback Loops

EVIDENCE Data must be measured, captured, and stored.

RELEVANCE Information must be relayed to stakeholders, not in raw data form, but in context that makes it resonant.

CONSEQUENCE The information must illuminate one or more paths forward.

ACTION There must be a clear moment when the stakeholders can recalibrate a behavior, make a choice, and act.

Harnessing the Power of Feedback Loops, Wired.com, 2011.

Use the built-in monitoring for this, and share!
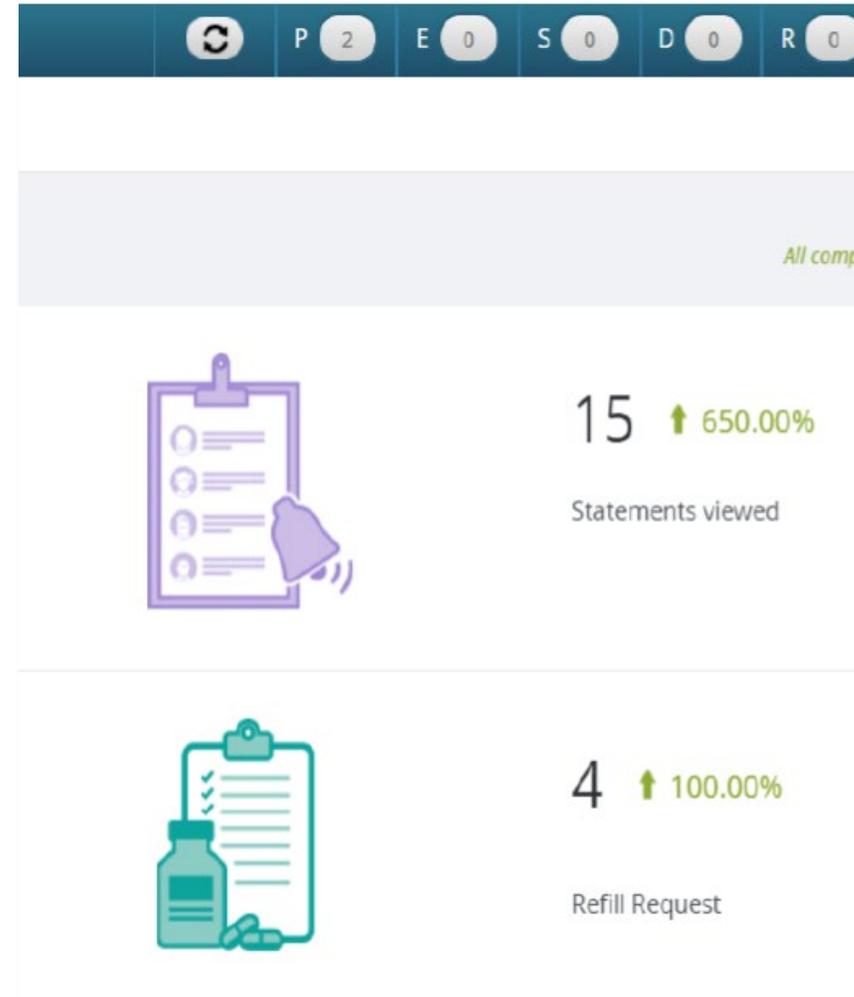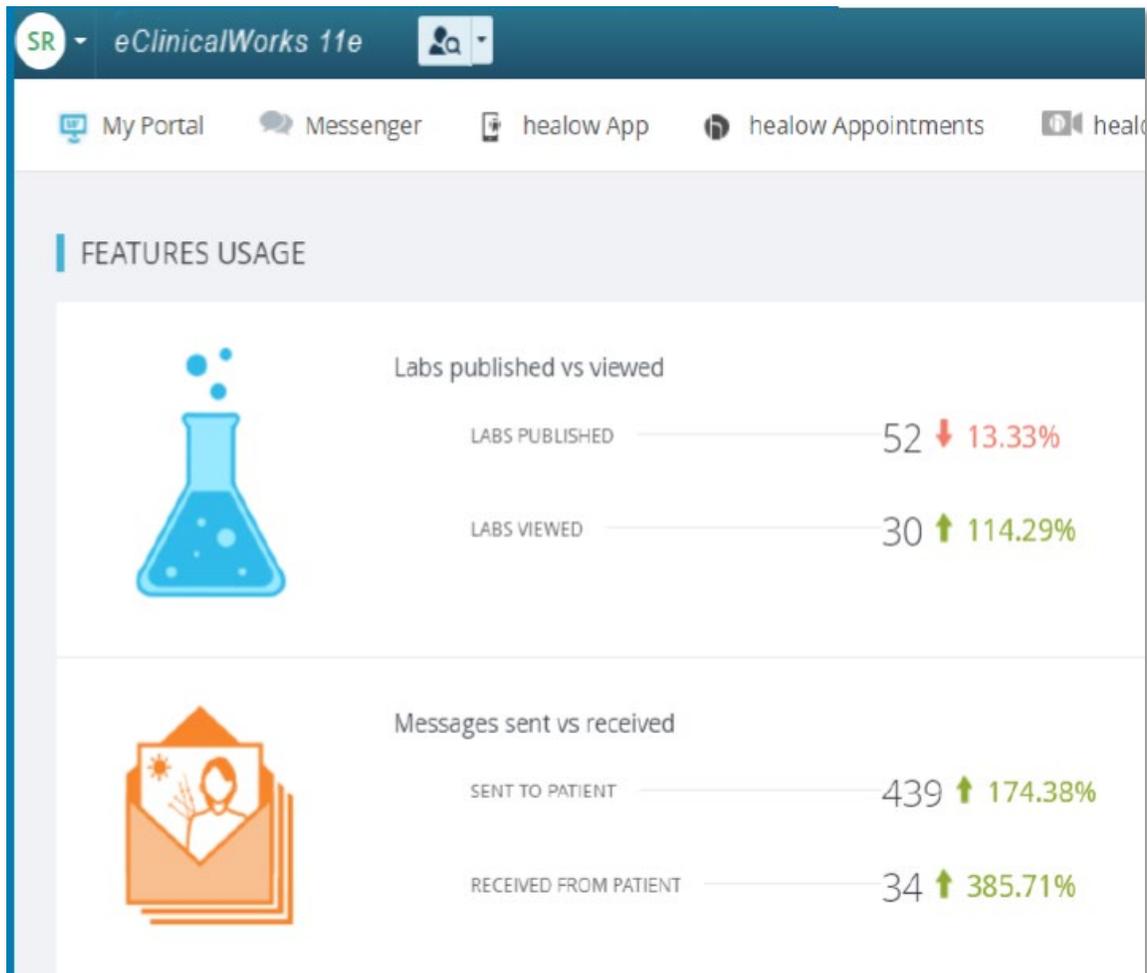
What is one thing you will do as a result of what we have discussed today?

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