HEALTH INFORMATION TECHNOLOGY,

HITEQ

EVALUATION, AND QUALITY CENTER

Patient Portal Optimization Peer Learning Series

Session 3: December 9, 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

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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

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Part Four 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 4

Patient and Provider Feedback

Today’s Discussion

- Where we left off!
- Using existing information for monitoring and feedback
- Gathering additional information
- Reinforcement and feedback loops
- Closing discussion

Attendees of this session will be able to…

1

Identify one or more approach to gathering meaningful provider feedback related to the patient portal.

2

Identify one or more approach to gathering meaningful patient feedback related to the patient portal.

3

Discuss one more option for acting on the feedback received.

Building on Session 3: 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.

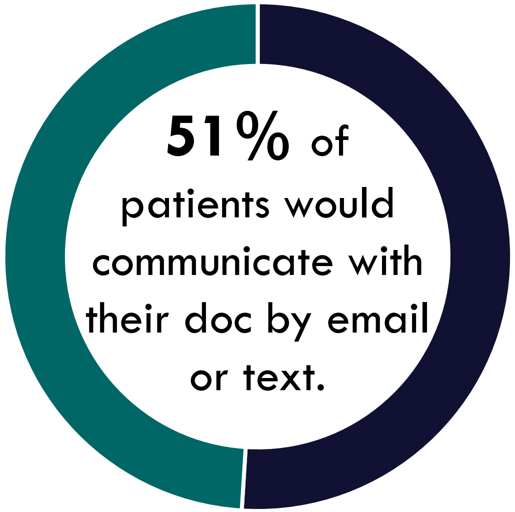
Be sure to keep getting feedback and iterating to ensure needs are met.

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.

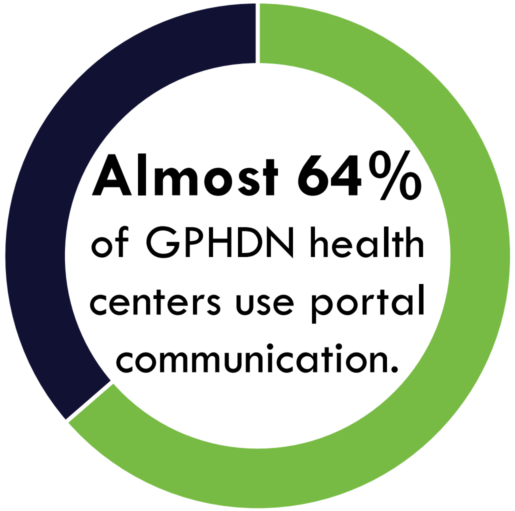
Supporting factors: Good reporting available (such as mgs sent and received) and it is desired by patients.



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.



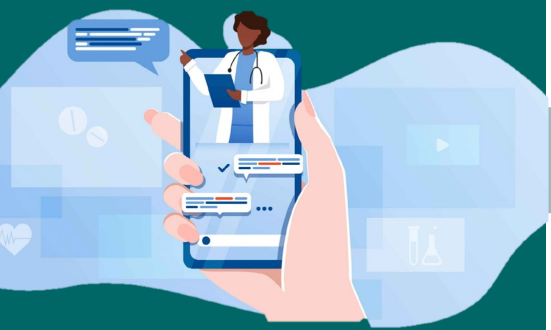
What Value Does the Portal Bring to your Clinic?

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.

An Example from Another Health Center



Health center implemented and rolled out patient portal, focusing on high value features that patients and staff wanted.

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.

Gathering Feedback from Patients and Staff

1. Use existing information and monitoring tools available in your system.
2. Focus on those with something to share, such as high adopters and low adopters.
3. ‘Survey’ or ask patients in the moment, while you have them.

1 Use Existing Monitoring Tools

Portal Use by Patients

Sign Ups/ Registrations: Your system almost certainly provides information on the portion of patients who have signed up for the portal.

Logins: Good reporting available (such as mgs sent and received) and it is desired by patients.

Actions in the Portal: Messages sent/ received, statements viewed, lab or test results viewed, etc.

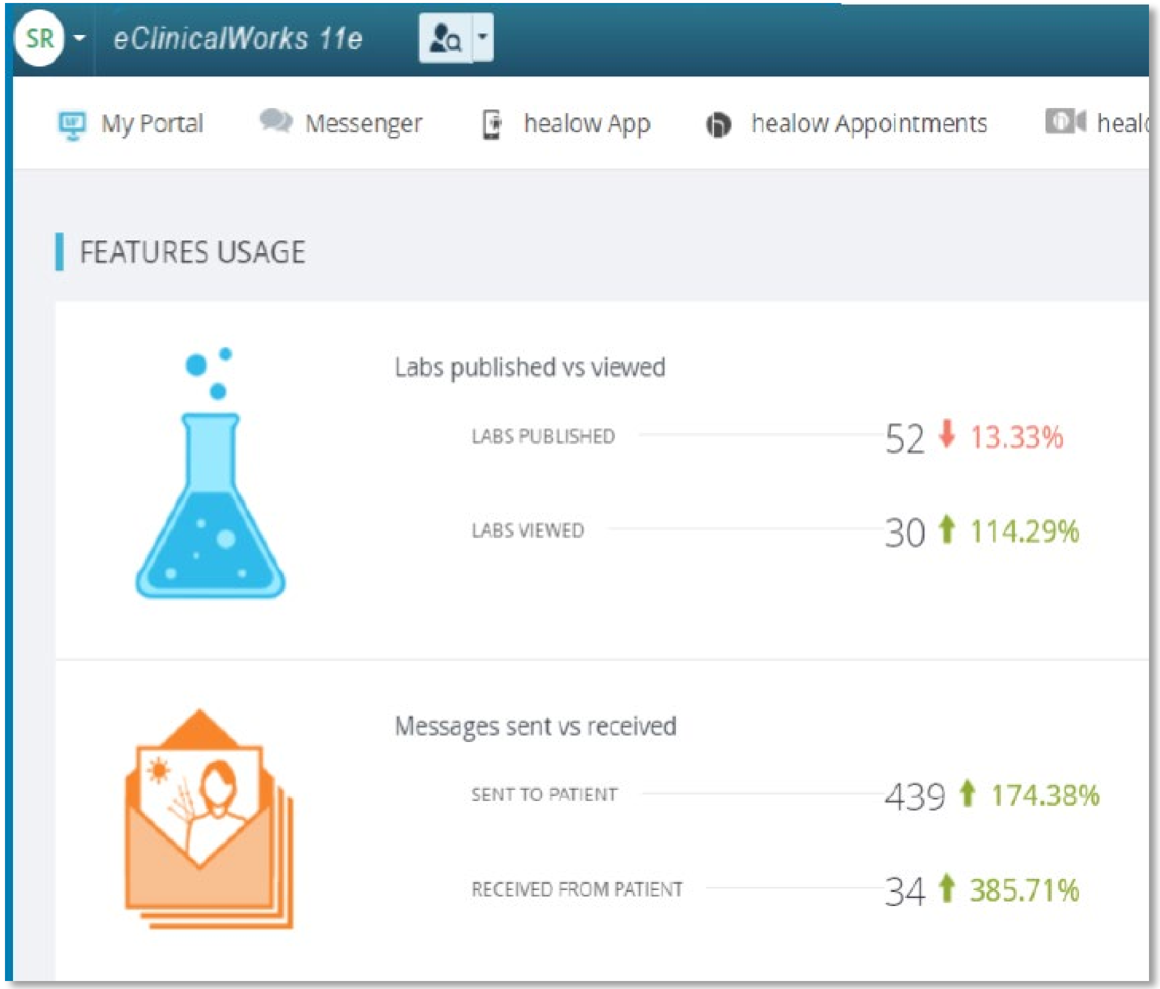
Engagement Analytics: Showing trends of logins, age groups, etc.

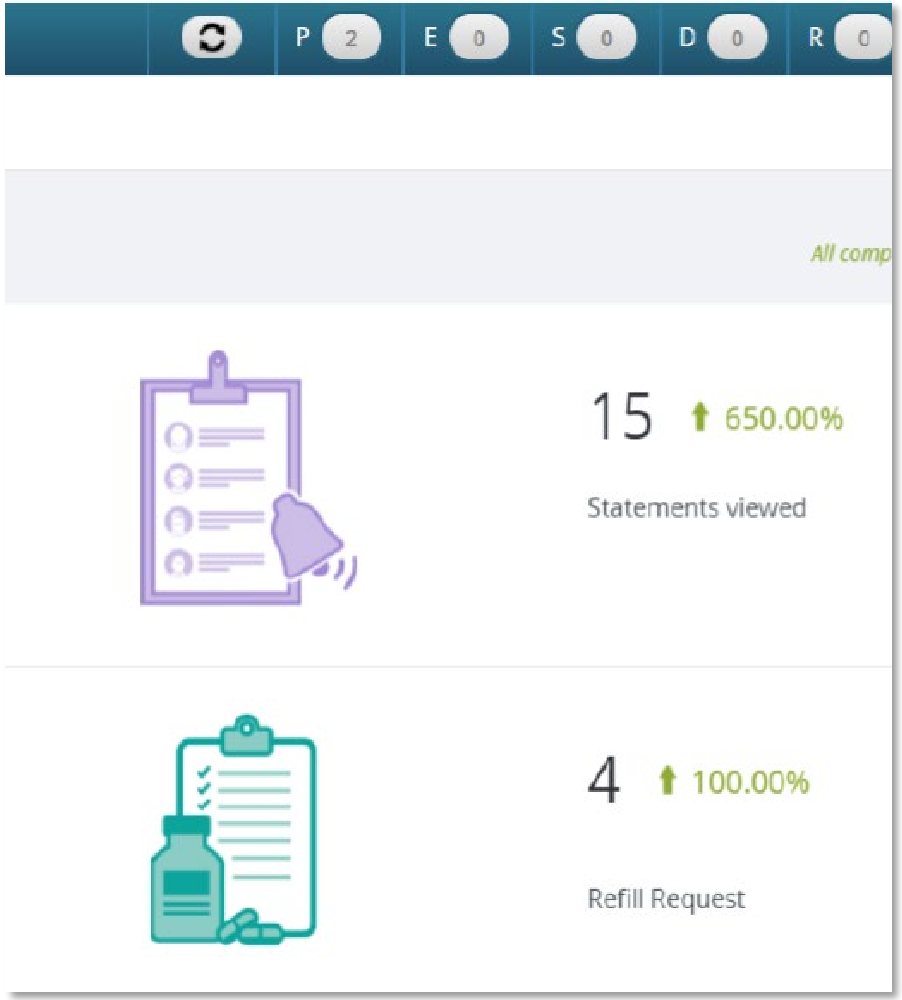
Portal Use by Staff

Messages sent/ received: You may want to monitor messages sent and/ or received by facility, provider, or staff as this will provide insight as to who are your high adopters and low adopters.

Response Times: In documented process, you establish response times. Monitor against those response times on an ongoing basis.*

Use the built-in monitoring for this, and share!





2 Focus on High AND Low Adopters

Staff/ Provider High Adopters:
- How are you letting your patients know about the portal?
- What, if anything, are you highlighting?
- What is your workflow for portal messages?
- Who is responding and when (are there dedicated staff and time)?
- What do you think the benefits are?

Patient High Adopters:
- Have you tried out the portal?
- What have done or tried to do in the portal?
- Did you/ do you find the portal helpful?

Everyone has someone to learn from these groups!

Staff/ Provider Low Adopters:
- How are you letting patients know about the portal?
- What, if anything, are you highlighting?
- What is your workflow for portal messages?
- What barriers/ challenges have you experienced?
- What benefits or drawbacks do you see?

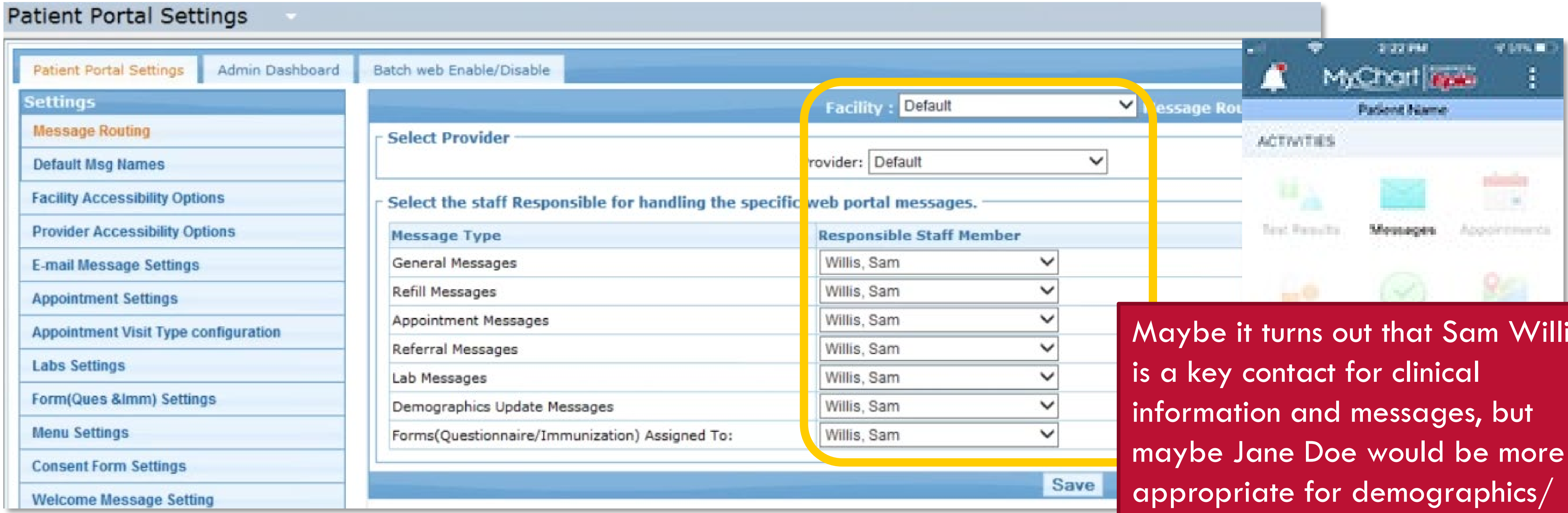
Patient Low Adopters:
- Have you tried out the portal?
- What have done or tried to do in the portal?
- Did you/ do you find the portal helpful?

What have you heard from your staff?

- Even informally, what have you heard from your **low adopters**?
  - Barriers, impressions, issues?
- What have you heard from your **high adopters**?
  - Benefits, workflows?
- What have you seen as the **primary difference** between the groups?

Optimizing Provider Communication

Setting up portal 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. **ITERATE AS NEEDED, these are not set it and forget it!**



Maybe it turns out that Sam Willis is a key contact for clinical information and messages, but maybe Jane Doe would be more appropriate for demographics/ questionnaires etc.

3 Ask patients in the moment

Points of Contact

Identify key points of contact where patients can and should be asked about the portal. Chief among these is when patients are calling for results or appointments. Seize the moment to ask about portal use/ satisfaction!

Scripts

Identify a couple specific questions to ask patients in that moment:

- Do you know you can see results/ schedule an appt in the portal? Have you tried it?
- Why or why not?
- What would help you use that?

Tracking

Track responses consistently in the most simple way that is widely available– categorize responses into 3-4 categories and keep a count. This can inform your efforts in promoting and/ or supporting the portal.

Then, use the information from patients!

Common Issue: Patients lack technology.

Next Steps: Decide what you as a clinic can/ will assist with (such as setting up email) and what means the patient will just continue to be contacted in traditional ways.

Common Issue: Patients don't see/ understand the value or why they would use it.

Next Steps: Craft messages focused on benefits to patients, rather that capabilities.

Common Issue: Patients are concerned about security.

Next Steps: Craft messages that explain how msgs/ results are handled and security.

Common Issue: Patients are need assistance/ further instruction.

Next Steps: Make clear portal instructions available in desired languages. Provide portal TA.

USE CASE: Patient Portal for COVID Vaccine

1. COVID Vaccine Broadcast Messaging- General
2. COVID vaccine broadcast messaging- dx specific
3. Bi-directional direct/ secure messaging
4. Pre-vaccination questionnaires/ eligibility assessments
5. Vaccine scheduling
6. Virtual waiting room/ 'Text when you arrive'

Keys to Successful Portal Implementation + Feedback

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!

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Embedding Change within the Organization

Standardize What Makes Sense	Portal becomes 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/ departments around goals and systems. This can't be another task just layered on top.

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 (or chat in) 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.

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

GPHDN: Next Steps with Portal

Where are we going from here?

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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.