Patient Access and Use of Patient Portals

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The NYeC Team

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About NYeC

• New York eHealth Collaborative (NYeC, pronounced “nice”) is a non-profit organization, working in partnership with the New York State Department of Health as the designated entity to improve healthcare through health information exchange (HIE) across the state. NYeC leads the advancement of the Statewide Health Information Network for New York (SHIN-NY), which connects seven regional networks, or Qualified Entities (QEs), allowing participating healthcare professionals, with patient consent, to quickly access electronic health information and securely exchange data with any other participant in the state.

• Health Care Advisory Professional Services (HAPs) team provides technical assistance to stakeholders in implementing technologies and processes to improve healthcare delivery in New York State.
Presenters

AJ Peterson  
VP, Interoperability  
Netsmart

Larry Seltzer  
GM, Client Alignment  
Netsmart
Today we will discuss:

• What is a patient portal?
• Identifying challenges and solutions
• Best practices for patient engagement
• Technical support & next steps
• Your questions & answers
Patient Access and the 21st Century Cures Act

- Increase patient access to health information
- Increase education regarding patients’ rights to access their health information
What is a Patient Portal?
What is a Patient Portal?

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

- View lab/immunization results
- Request refills
- Schedule appointments
- View personal health information
- Exchange secure messages with providers
- View education material
- Update demographic information
- Review referrals
Patient Portals Provide Access to...

- **Patient-Specific Education Resources**
  - The EHR incorporates an extensive library of patient education resources.

- **Visit and Clinical Summaries**
  - Practices can share visit and clinical summaries with patients directly through the portal.

- **Electronic Access to Health Information**
  - Patients can use the patient portal to access lab results.
Why Patient Portals?

- Improves healthcare utilization
- Allows patients to read and process health information at their own pace
- Gives patients more ownership of their own care

Patient Portal Impact on Emergency Room Visit Rates

- Accessed Patient Portal
- Did Not Access Patient Portal
# EHRs and Patient Portals

<table>
<thead>
<tr>
<th>EHR Name</th>
<th>Name of Patient Portal</th>
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</thead>
<tbody>
<tr>
<td>Foothold Technologies</td>
<td>Foothold Connect</td>
</tr>
<tr>
<td>Netsmart</td>
<td>MyHealthPointe</td>
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<tr>
<td>Accumedic</td>
<td>Accumed Cloud</td>
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<tr>
<td>10e11</td>
<td>eCR</td>
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<tr>
<td>Cerner</td>
<td>HealtheLife℠</td>
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<tr>
<td>Allscripts</td>
<td>FollowMyHealth</td>
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<td>EPIC</td>
<td>MyChart</td>
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<td>PSYCKES</td>
<td>MyCHOIS</td>
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Identifying Challenges and Solutions
Patient Portal Challenges

- Special Populations
- Patient Access
- Practice Staffing
- General Patient Population
# Challenges and Solutions: Special Populations

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Foster Care</th>
<th>Homeless</th>
<th>Geriatric/Older Population</th>
<th>Non-English Speaking</th>
<th>Disabilities</th>
<th>Adolescents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Solutions</strong></td>
<td>Utilizing Case Managers</td>
<td>Use of practice account</td>
<td>Providing access for caregivers or adult children</td>
<td>Develop materials in preferred language</td>
<td>Educating caregivers on care coordination and the patient portal</td>
<td>Proxy Access, Guardian Verification</td>
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<td></td>
<td>Using organizational accounts</td>
<td>Libraries/ Drop-In Centers</td>
<td></td>
<td>Translator</td>
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<td>Scheduling Call-Blocks</td>
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**Care Transitions Network**

for People with Serious Mental Illness
# Challenges and Solutions: Patient Access

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Non-Authorized Patient Representative</th>
<th>Lack of Internet Connection</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Solutions</strong></td>
<td>• Obtain Patient Consent</td>
<td>• Locate areas with WiFi</td>
</tr>
<tr>
<td></td>
<td>• Identify Patient Representative</td>
<td>• Utilize Smartphones in office</td>
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<tr>
<td></td>
<td>• Provide proxy access to patient representative</td>
<td>• Use kiosks/iPads available in the practice</td>
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<tr>
<td>Challenges</td>
<td>Constant Staff Turnover</td>
<td>Limited Staff Size</td>
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<td>---------------------------------------------------------</td>
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<tr>
<td>Solutions</td>
<td>• Developing Polices and Procedures</td>
<td>• Delegate tasks among staff</td>
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<td></td>
<td>• Training new and existing staff</td>
<td>• Assign Roles</td>
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<td></td>
<td>• Establishing a relationship with REC resources</td>
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## Challenges and Solutions: General Patient Population

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Patients are disinterested</th>
<th>Patients see no value</th>
<th>Patient privacy concerns</th>
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</table>
| Solutions  | • Actively promote the patient portal  
             • Encourage patient to use the patient portal | • Identify and explain the benefits of the patient portal | • Discuss the safeguards of the patient portal  
             • Remind patients they are the gatekeeper |
Incentivizing the Patient Portal for Adults

- Direct contact with provider
- Visit summaries
- Essential patient education material
Best Practices for Patient Engagement
Considerations for Patient Portal Use

**How** does the practice decide to use the patient portal? – What features does the practice need?
- Secure messaging
- Summary of care
- Lab results
- Engage with vendors!

**Who** are the patients? – How can the practice tailor the portal to patient needs?
- Pediatric
- Non-English speaking
- Transient

**Which** staff member is responsible for what task? – Delegate those tasks appropriately.
- Cross train
- Policies and procedures
Portal Education

• Combine a high level of desirable functionality with a user-friendly interface
  • More complex and overly complicated = patient engagement

• Develop a **two-fold education approach** to get patients to use the portal and engage in care collaboration
  1. Internal education strategy which puts your entire staff on the same page.
  2. External education strategy to reach the patients you serve.

Let’s look at some strategies for each of those.
Strengthening Practice Workflows for Patient Portal

Step 1.
- Patient arrives to the office
- Fliers to promote the patient portal

Step 2.
- Patient engages with administrative staff

Step 3.
- Patient sits in the waiting room

Step 4.
- Patient engages with provider staff

Step 5.
- Patient returns to administrative staff
Strengthening Practice Workflows for Patient Portal

**Step 1:** Patient arrives to the office

- Strategically place fliers around practice
  - Inside the bathroom
  - In provider office
- Laminated fliers on countertop
  - Limited information
  - Bold lettering
Strengthening Practice Workflows for Patient Portal

Step 1.
- Patient arrives to the office
- Fliers to promote the patient portal

Step 2.
- Patient engages with administrative staff
- Discuss the patient portal and encourage login

Step 3.
- Patient sits in the waiting room

Step 4.
- Patient engages with provider staff

Step 5.
- Patient returns to administrative staff
Strengthening Practice Workflows for Patient Portal

**Step 2:** Patient engages with front desk staff

- Start a conversation surrounding the patient portal
- Ask the patient if they have a portal account
  - If yes, encourage them to login
  - If no, assist with creating account
- Keep it simple
Step 1.
• Patient arrives to the office
• Fliers to promote the patient portal

Step 2.
• Patient engages with administrative staff
• Discuss the patient portal and encourage login

Step 3.
• Patient sits in the waiting room
• Provide reading materials and remind patients to login

Step 4.
• Patient engages with provider staff

Step 5.
• Patient returns to administrative staff
Strengthening Practice Workflows for Patient Portal

Step 3: Patient sits in waiting area

- Patient logins and account creation
  - Tablets
  - Kiosks
  - Smartphones

- Provide patient education

- Confirm patient information
Strengthening Practice Workflows for Patient Portal

Step 1.
- Patient arrives to the office
- Fliers to promote the patient portal

Step 2.
- Patient engages with administrative staff
- Discuss the patient portal and encourage login

Step 3.
- Patient sits in the waiting room
- Provide reading materials and remind patients to login

Step 4.
- Patient engages with provider staff
- Discuss the advantages of the patient portal

Step 5.
- Patient returns to administrative staff
Strengthening Practice Workflows for Patient Portal

**Step 4:** Patient engages with provider and staff

- **Highlight functionalities**
  - Patient education
  - Requesting refills
  - Visit summaries

- **Privacy**
  - Information presented in portal
  - Email notification

- **Secure Messaging**
  - Non-urgent questions
  - Direct contact
Strengthening Practice Workflows for Patient Portal

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- Patient engages with provider staff
- Discuss the advantages of the patient portal

Step 5.
- Patient returns to administrative staff
- Remind and reinforce
Step 5: Patient returns to front desk staff

- Informative fliers
- Scheduling appointments
- Account creation
- Remind and reinforce!
  - Updated Visit Summaries
  - New messages sent to email
Netsmart Patient Portal Demonstration
Consumer-driven Care

myHealthPointe™

WHOLE PERSON CARE
- Evidence-based content
- Consumer education resources
- Assessments
- Communication with care team
- Access to personal health data
- Notifications/reminders

OUTCOMES
- Longitudinal view into consumer’s health and wellness
- Improves client outcomes
- Organizational savings
- Increases appointment kept rate and medication adherence
- Decreases call volume

KEY FEATURES
- Secure messaging
- 24-hour access
- Notifications/reminders
- Medications
- Appointments
- Standardized consumer satisfaction surveys
- Evidence-based assessments
- Labs

Solution Marketing Kit: Tools to engage your clients and associates
Point-of-care Consumer Engagement

• *Business Perspective*
  
  - Encourage a spirit of transparency
  - Promote consumer empowerment
  - Support wellness and recovery
  - Facilitate communication
  - Standardized check-in procedures provide better data and reduce administrative tasks
  - Assessments and screeners completed prior to appointments can be incorporated into the EHR and viewed immediately by clinicians
  - Reduced wait times improve the consumer experience
The Growth of Telehealth

- Driving down costs, increasing efficiencies

Many individuals prefer to interact with care providers digitally.

- 75% of healthcare delivery organizations (HDOs) are investing in telehealth.

ENGAGEMENT

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
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<tbody>
<tr>
<td>51%</td>
<td>Improved efficiency or timeliness of care delivery</td>
</tr>
<tr>
<td>47%</td>
<td>Increased cost savings to the practice/facility</td>
</tr>
<tr>
<td>58%</td>
<td>Increased provider satisfaction</td>
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</tbody>
</table>

HDOs reported a better-than-expected result from telehealth.
Technical Support and Next Steps
Technical Support Workflow

1. Contact EHR vendor
2. Refer to EHR Guides
3. Troubleshoot issues with patient portal
Summary

• Practices may have specific challenges with the Patient Portal including special populations or implementing new workflows.

• Bolstering patient engagement could improve use of the patient portal.

• Technical support is available through NYeC for Behavioral Health Organizations that are NYS members of the National Council for Behavioral Health during the duration of our Learning Collaborative program.
Next Steps

- Identify specific tasks for practice staff when implementing a new workflow
- Examine or Implement policies and procedures on patient portal engagement
- Customize the patient portal
- Take advantage of resources and incentive programs
Services Provided by NYeC

- HIT Webinar Series
  1. Health IT 101 for Behavioral Health Providers
  2. EHR Optimization & Workflow Redesign for Behavioral Health Providers
  3. Behavioral Health Performance Measures
  4. Quality Improvement and Value Based Care
  5. Patient Access and Use of Patient Portals
  6. Health Information Exchange for Behavioral Health Providers

- 1:1 Consulting
- Vendor Workgroups
- RHIO Toolkit
- Learning Management System
Learning Collaborative Opportunities

• **Vendor Workgroup Sessions**
  - Come collaborate with other organizations utilizing your EHR and meet your vendor. Learn best practices on how to optimize your system
    - Session 5/6 dates:
      - Cerner – July 23, 2019 2 pm – 3 pm
      - 10e11 – July 24, 2019 2 pm – 3 pm
      - Foothold – July 26, 2019 2 pm – 3 pm
      - Accumedic – July 29, 2019 2 pm – 3 pm
      - Netsmart – July 30, 2019 2 pm – 3 pm

• **1:1 Consulting**
  - Personalized technical assistance and attention to your Health Information Technology (HIT) needs is available
    - If interested, please contact the Care Transitions Network via email at CareTransitions@TheNationalCouncil.org to be linked with NYeC’s expert team on how to optimize your HIT
Learning Collaborative Opportunities

• Upcoming Webinars and Dates
  • Webinar #6 – Interoperability and Connecting to the RHIO and Utilizing the SHIN-NY: Wednesday, July 31, 2019 from 12 PM to 1 PM

• Learning Management System Organizations may access the LMS library of resource material by sending an email to CareTransitions@TheNationalCouncil.org

• RHIO Toolkit coming soon
nyehealth.org

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Thank you!

www.CareTransitionsNetwork.org
CareTransitions@TheNationalCouncil.org

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