BEYOND MEANINGFUL USE:

Patient portal adoption strategies to engage and partner with patients

RULES FOR SESSION

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- This is a participatory session.
- Sitting, looking bored is not an option.
- Have your smartphones out and ready. There will be text polling throughout the presentation.
- You are encouraged to participate!
- Be prepared to volunteer and ready to talk.

Which response most closely resembles how you are feeling right now?

This has been a great day! I cannot wait to learn more!

This session looks like fun!

My feet hurt! Glad to be sitting down!

I have been sitting all day! Hope this is worth sitting some more!

Keeping my spirits up so I can avoid road rage later

OMG, I hope my boss doesn't catch me napping!

Start the presentation to see live content. Still no live content? Install the app or get help at **PollEv.com/app**

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LEARNING OBJECTIVES

- List the strategies and tactics that are most effective for patient portal enrollment.
- Describe the motivators for patients to enroll.
- Illustrate the effectiveness of talking points and scripting for patient engagement.
- List follow-up activities that demonstrate the on-going value of portal utilization with the patient.

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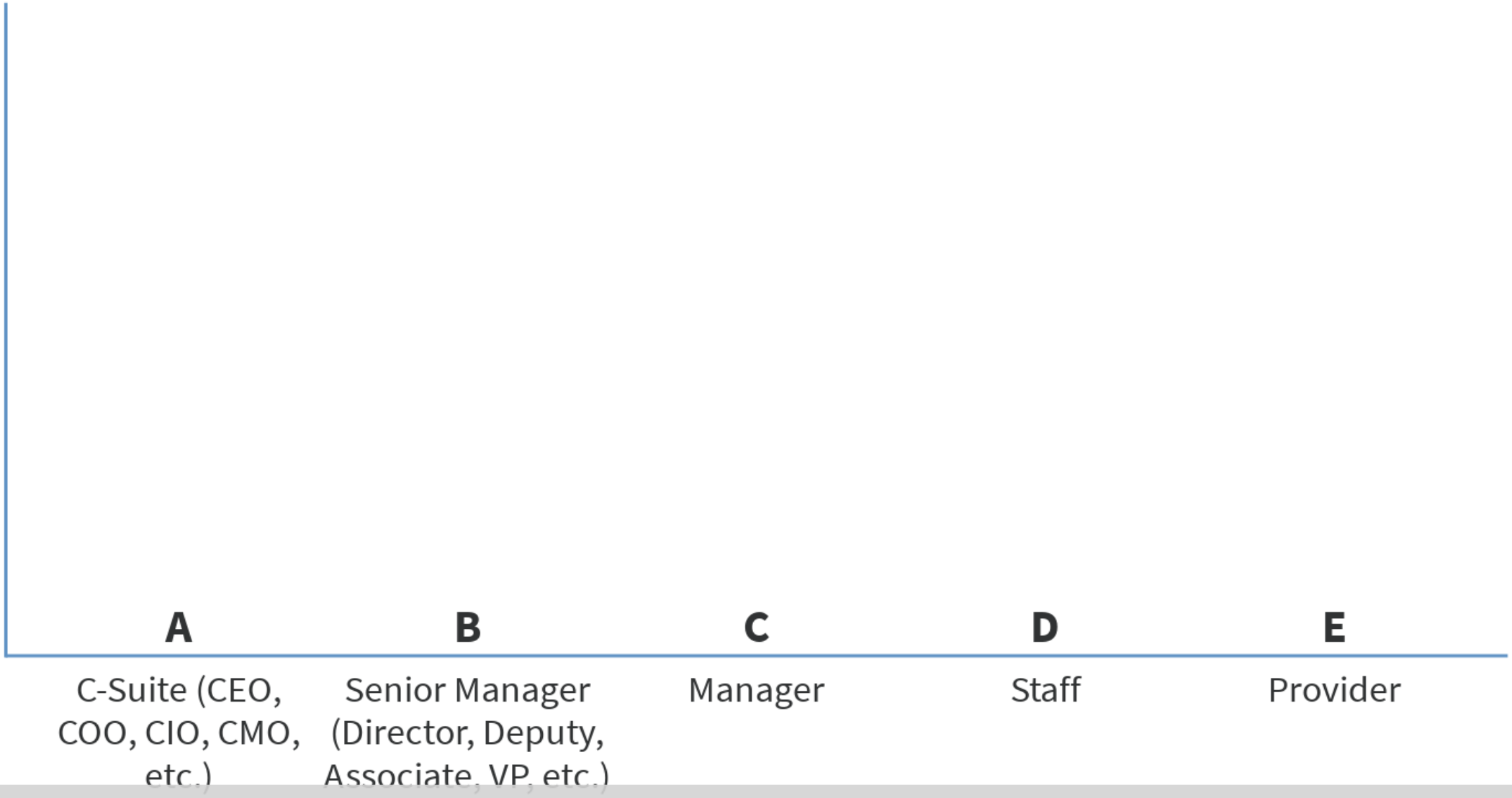
Who is in the room?



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History of Meaningful Use and Patient Portals

STAGES

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What it really means: At least 50% of the patients seen need to have an electronic record and a patient portal needs to exist, but there is no requirement that patients use it.

What it really means: At least 50% of the patients seen need to have an electronic record, a patient portal needs to exist, and now at least 5% of the patients must have used the portal at least once.

http://ascrs.org/sites/default/files/Final_PatientPortal.pdf

STAGE 3

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- Objective: The Eligible Professional (EP) provides patients (or patient-authorized representative) with timely electronic access to their health information and patient-specific education.
- Measure 1: For more than 80 percent of all unique patients seen by the EP:
  - The patient (or the patient-authorized representative) is provided timely access to view online, download, and transmit his or her health information; and
  - The provider ensures the patient's health information is available for the patient (or patient-authorized representative) to access using any application of their choice that is configured to meet the technical specifications of the API in the provider's certified EHR technology (CEHRT)
- Measure 2: The EP must use clinically relevant information from CEHRT to identify patient-

Invest in a different EHR that can do this for you.

https://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/Downloads/MedicaidStage3_PatientElectronicAccessTipsheet.pdf

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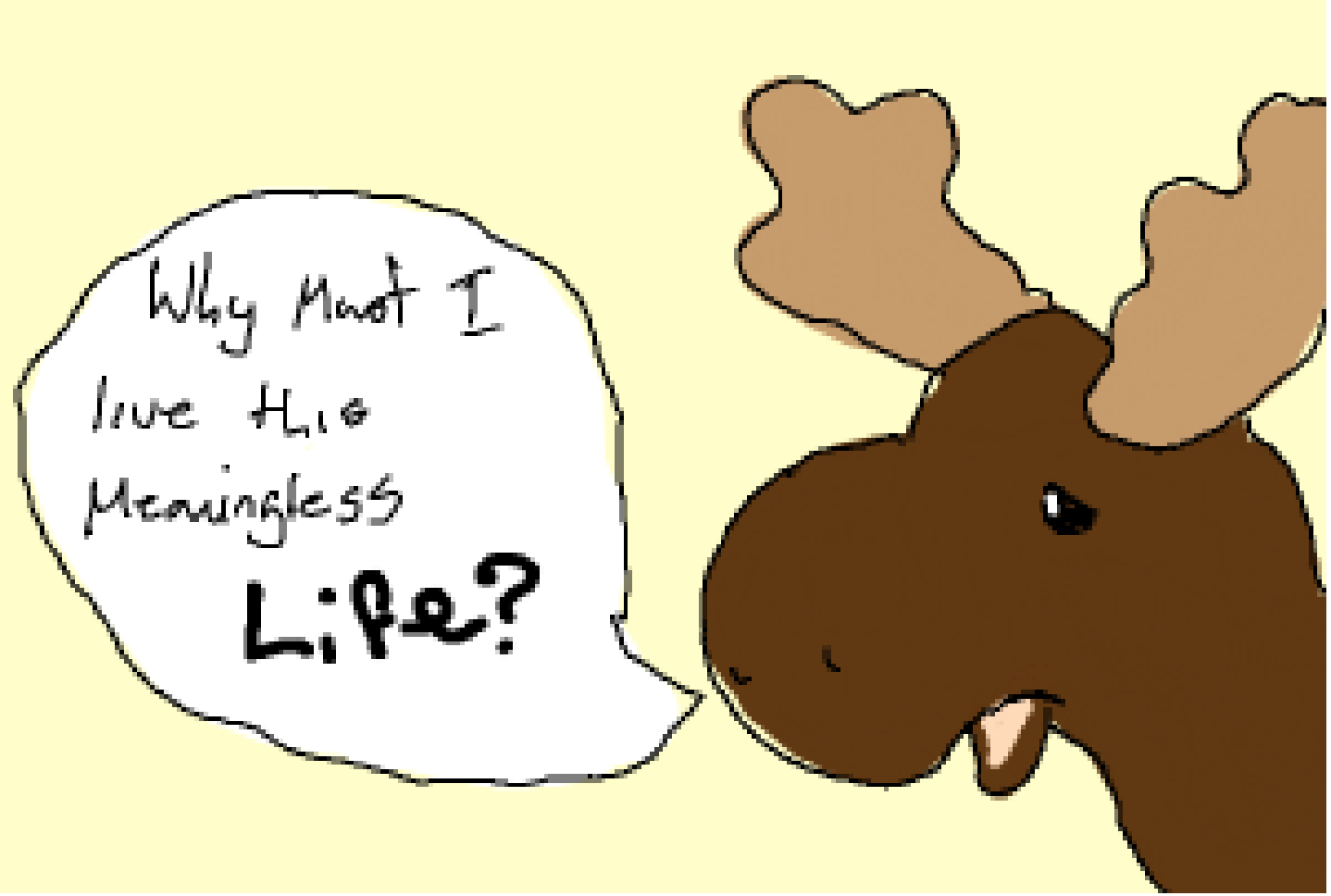

MEANINGLESS MOOSE

FEATURES OF QUEENSCARE HEALTH CENTERS

- OCHIN Epic EHR
- MyChart Patient Portal
- 5 health center site in Los Angeles
- Approx 25,000 unique patients
- Over 105,000 patient visits per year
- 200 staff in direct service to our patients
- Services include: Primary care 0-99, dental, optometry, Ob/Gyn, podiatry, clinical pharmacy, nutritional services, enrollment, staff lunches, and a great place to work!

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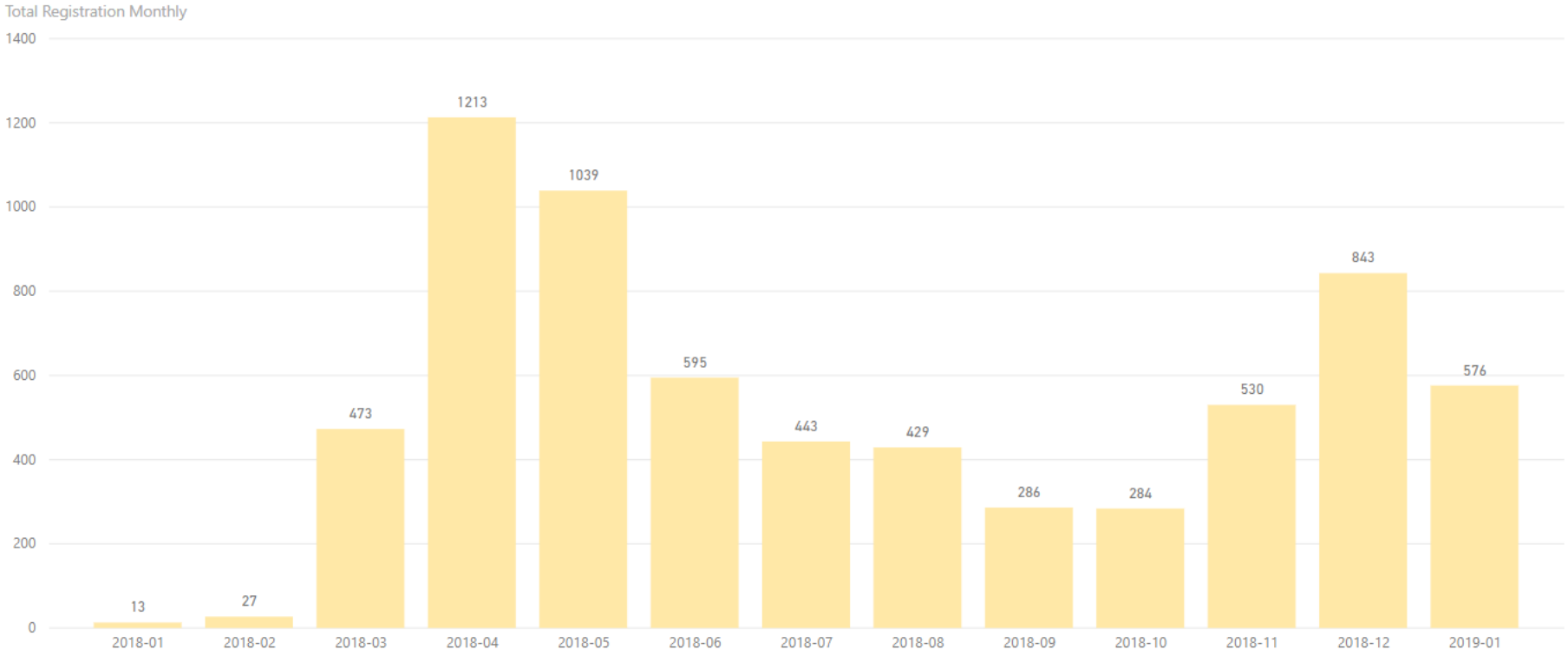

2018-01	2018-02	2018-03	2018-04	2018-05	2018-06	2018-07	2018-08	2018-09	2018-10	2018-11	2018-12	2019-01	**Total**
13	27	473	1213	1039	595	443	429	286	284	530	843	576	**6751**

STAFF INITIATED ENROLLMENTS BY MONTH JANUARY 2018 - JANUARY 2019

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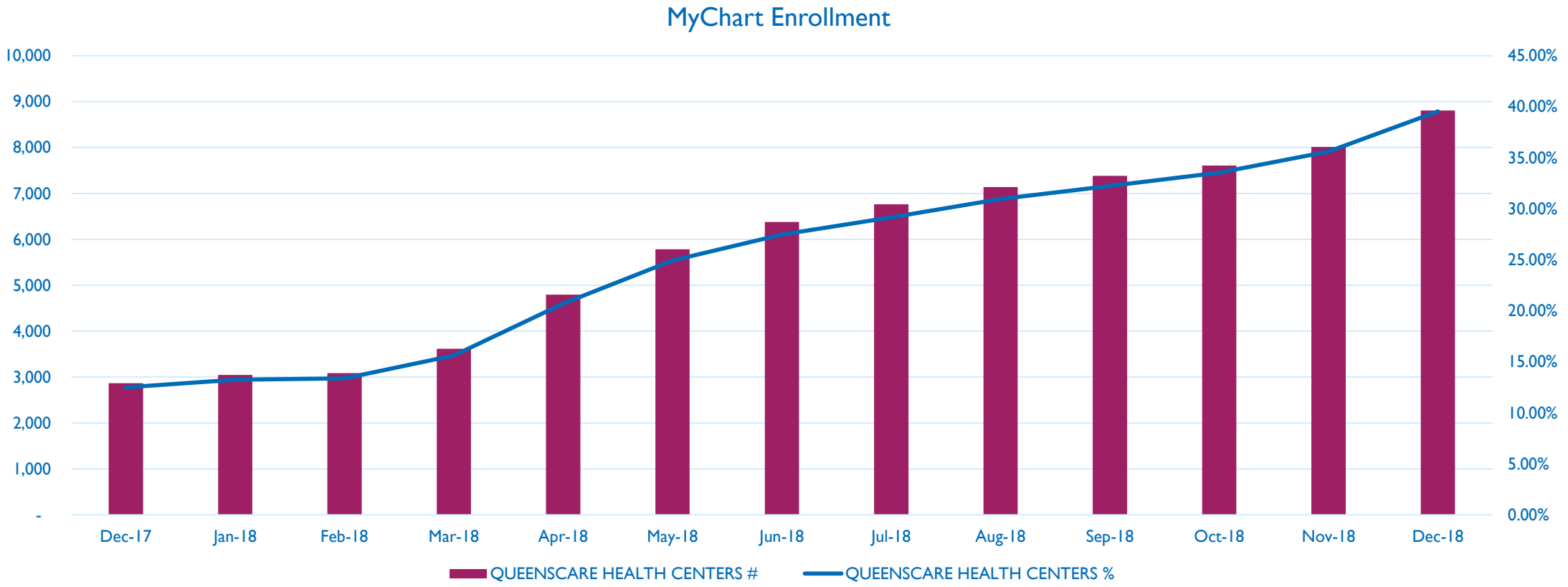

PATIENT PORTAL ADOPTION RATE DECEMBER 2017-DECEMBER 2018

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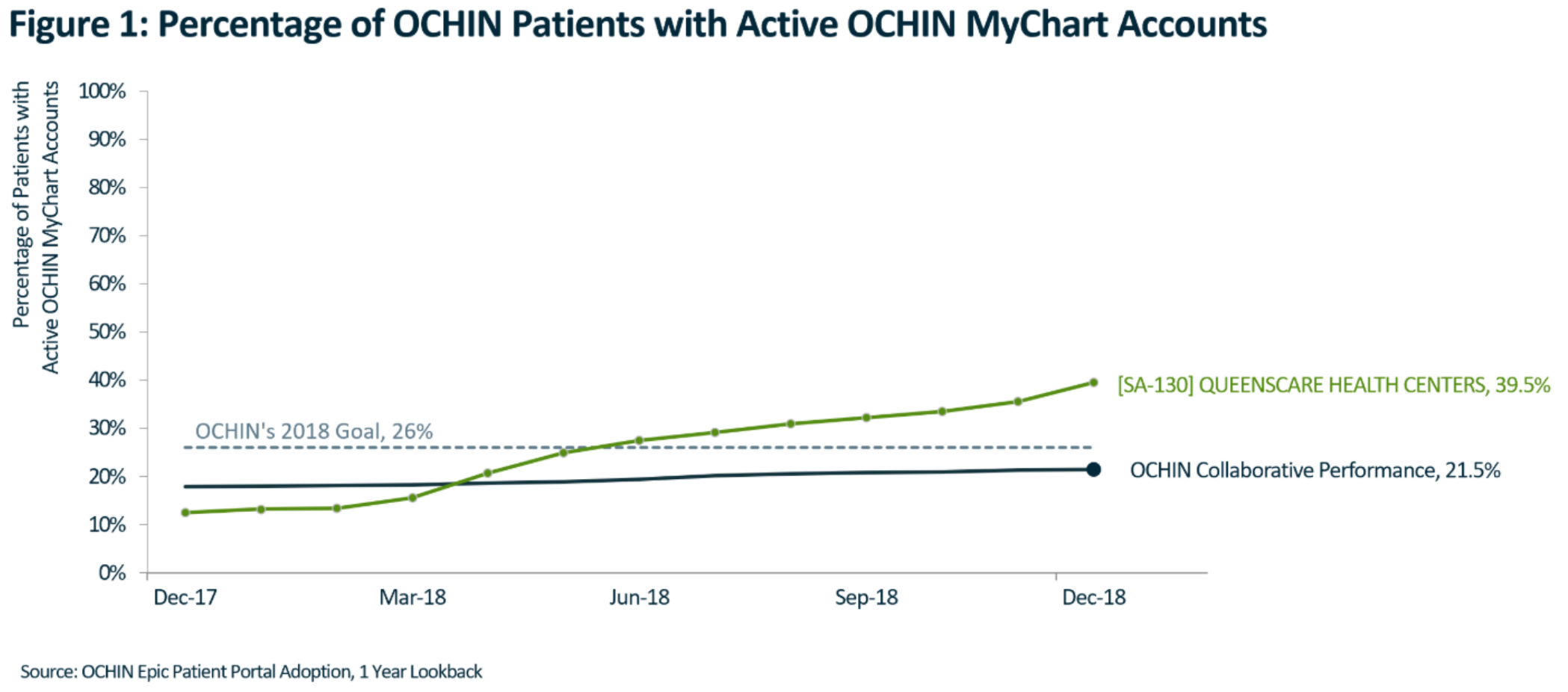

ACTIVE PORTAL ACCOUNTS COMPARED TO OCHIN COLLABORATIVE DECEMBER 2017 - DECEMBER 2018

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PATIENT INVOLVEMENT AND ENGAGEMENT

Reasons patients give us for not enrolling in patient portals

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WHO CAN ENROLL?

IS IT ONLY THE PATIENT?

- Caregiver
- Family member
- Parent of a child (up to 11 years old in CA)
- Adolescent (if you CEHRT will support)
- Facilitate gaining permission from the patient

WHO AT YOUR CENTER?

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Everyone!

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PATIENT PORTALS ADD VALUE - PROVIDERS

- Improve Care
  - Patients can approve information online including
    - Demographics, allergies, insurance and medical history
    - Forms can be filled out using the portal if configured
- Balancing Costs
  - Patients access information independently reducing burden on office staff and providers
    - Scheduling, rescheduling, lab results, prescription refills, treatment plan details
    - Condition specific interactive education

J. Barnett. Beyond Meaningful Use: The Value of Patient Portals. https://www.healthitoutcomes.com/doc/beyond-meaningful-use-the-value-of-patient-portals-0001

PATIENT PORTALS ADD VALUE - PROVIDERS

- Private, structured and direct communication
  - Patients feel safe discussing embarrassing and difficult topics via the portal
  - Improves outcomes
- Handling Workflows
  - Sensitive information automation such as record sharing, report creation and transmission to other caregivers
  - Patients can facilitate information sharing – reducing burden on staff in favor of other duties

J. Barnett. Beyond Meaningful Use: The Value of Patient Portals. https://www.healthitoutcomes.com/doc/beyond-meaningful-use-the-value-of-patient-portals-0001

PATIENT PORTALS ADD VALUE - PATIENTS

- Constant Connection
  - Patients feel connected directly to the provider and supported especially the frail and burdened with chronic disease.
  - Patient-oriented and intuitive portals increase communication channels for 2 way messaging, email, video chat and virtual visits.
- Staff Guidance
  - Training staff to speak to the value of the portal is essential
  - Initial time to educate the patient on the portal returns investment by reduced long-term burden on the practice and makes the patient a more efficient consumer.
- Bi-directional
  - Add value through regular messaging, AVS, medication instructions, lifestyle encouragement, immunization and recall reminders. Condition patients to expect to interact via the portal.

J. Barnett. Beyond Meaningful Use: The Value of Patient Portals.
https://www.healthitoutcomes.com/doc/beyond-meaningful-use-the-value-of-patient-portals-0001

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How long does it take to enroll a patient in the patient portal?

A. 60 seconds

B. 90 seconds

C. 2 minutes

D. 5 minutes

E. More than 5 minutes

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WHAT DID WE TRY AT QHC?

Portal Adoption 1.0

VENDOR POSTER

BRANDED POSTER AND FLYERS

Some cost ☹

Easy to get!

Easy to post!

Nobody paid attention!

Mid-2016

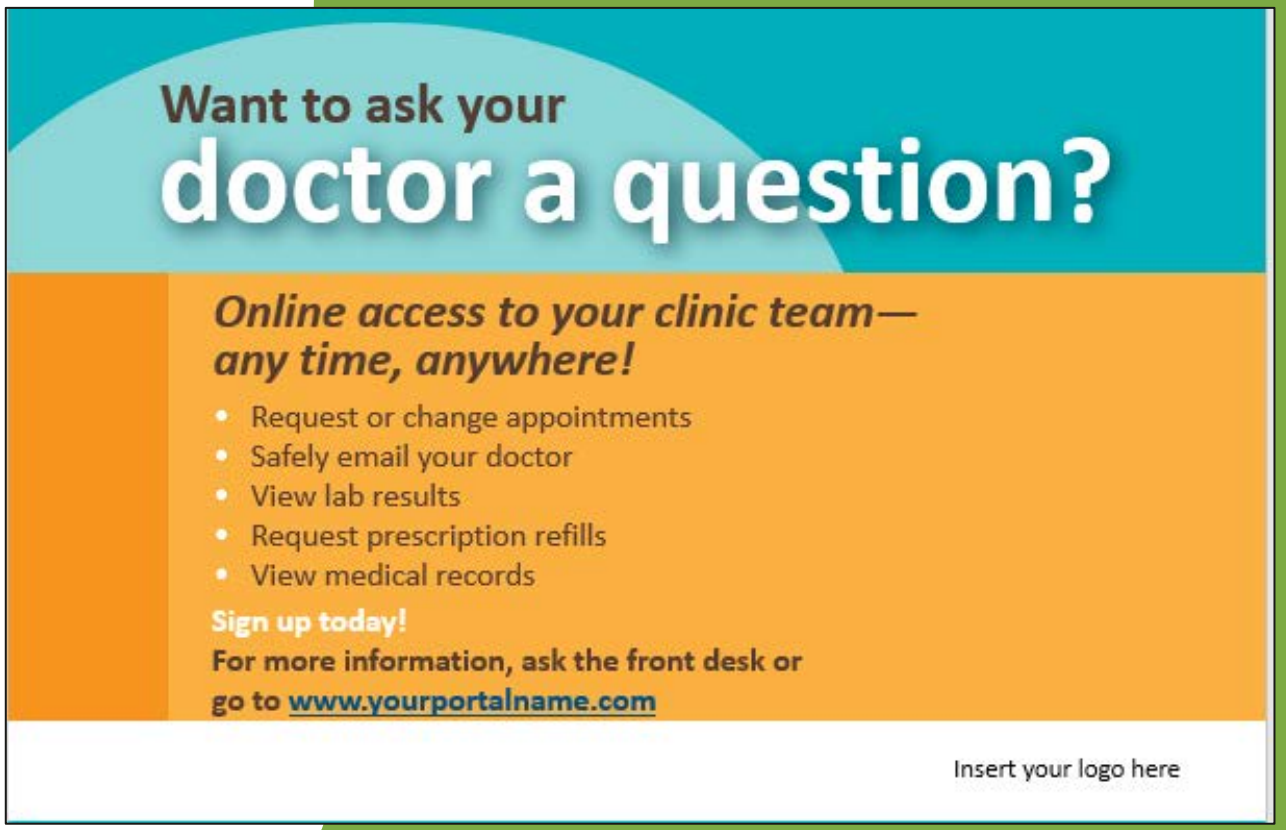
PASSIVE ENROLLMENT AND POSTCARDS

Asking patient to enroll

Sending Postcards

Ineffective!

Mid-2016



VENDOR FEEDBACK

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- OCHIN Study and Report
  - Patients more likely to access patient portal through a smartphone!

- Thought at QHC:

  Ah Ha! NOW THAT MUST BE THE SECRET SAUCE!

SMARTPHONES FOR PATIENTS

- Question: How do we make sure our patients have smartphones? We certainly cannot afford to buy them.
- Answer: California Lifeline wireless telephone service = free smartphone
- Strategy
  - Partner with vendor to provide smartphones
- Tactic
  - Have vendor set up in front of the health centers and offer smartphones to all patients.

Winter 2016 - 2017

Glidden
GRANING
PAINT CO.
DETOUR
SOUTH
441
HENLEY
BRIDGE
wireless
www.accesswireless.com
FREE

SMARTPHONES FOR PATIENTS

EPIC FAIL!

- Question: [illegible] patients have smartphones? We certainly cannot afford to buy them.
- Answer: California Life[illegible] = free smartphone
- Strategy
  - Partner with vendor to provide sma[illegible]
- Tactic
  - Have vendor set up in front of the health centers and [illegible]es to all patients.

Winter 2016 - 2017

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STRATEGY REMODEL

Demolish and leave up just one wall – Permits not required!

HYPOTHESIS: IF WE ENROLL THE PATIENT AS PART OF THE VISIT, THEY WILL ACCEPT ENROLLMENT.

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PILOT PROJECT

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- K.I.S.S. Method.
- One-Week Trial
  - Embed a Patient Advocate with a 3 provider care team and have the MAs direct the Patient Advocate to the exam rooms either during or after a visit to go over the patient portal and enroll patients.
- Questions to answer:
  - Will patients enroll, and at what frequency?
    - **Yes, 80% conversion rate**
  - Can 1 Patient Advocate support 3 providers?
    - **Yes, the ratio is perfect!**

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PORTAL ADOPTION VERSION 2.0

Strategy #1	Strategy #2	Strategy #3
Make the patient portal enrollment part of the 2018 enrollment process.	Make patient portal enrollment an all-hands activity.	Actively enroll patients at the point of care.

STRATEGY #1 - MAKE THE PATIENT PORTAL ENROLLMENT PART OF THE 2018 ENROLLMENT PROCESS.

Tactic #1	• Create a script, step by step process, and FAQs; make it easy.
Tactic #2	• Train all staff to introduce the patient portal as part of the 2018 enrollment process.
Tactic #3	• Encourage and monitor enrollment and reception staff to enroll patients upon arrival or during enrollment meeting.
Tactic #4	• Provide enrollment information to the patient after enrollment.

STRATEGY #2 - MAKE THE PATIENT PORTAL ENROLLMENT AN ALL-HANDS ACTIVITY

Tactic #1	• Train all staff how to enroll a patient into the patient portal.
Tactic #2	• Make data available to all staff about who is enrolling patients and how many.
Tactic #3	• Encourage providers to discuss the portal as: A communication tool that adds value to the visits.
Tactic #4	• Train call center staff to introduce the patient portal over the phone and facilitate enrollment or encourage enrollment during the visit.

STRATEGY #3 - ACTIVELY ENROLL PATIENTS AT THE POINT OF CARE. (MOST EFFECTIVE)

Tactic #1	• Hire and train specific staff for enrolling patients into portal.
Tactic #2	• Download daily schedule reports of patients that have not yet enrolled on the patient portal.
Tactic #3	• Embed portal enrollment staff with care teams with a ratio of no more than 1:3 providers and interact with MA staff to enroll patients in the exam rooms.
Tactic #4	• Monitor conversion rates and adjust staffing or redeploy staff when volume of non-enrolled patients is lower.

DEMONSTRATION

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- English
- Spanish

MyChart Script Quick Reference Guide

For QHC team members

1 MyChart Registration before the Visit

Before completing check in, complete patient's MyChart Registration

"Hello my name is (Employee Name), I am a(n) (Employee Title) for QHC. As part of your enrollment with QueensCare Health Centers, I'd like to assist you with your MyChart registration."

Patient Concern: "What is MyChart?"

Employee Response: "MyChart is an easy, confidential way to access your medical information online."

✓ MyChart allows patients to:	✓ Communicate with their health care team
✓ MyChart allows patients to:	✓ View portions of their electronic health record
✓ MyChart allows patients to:	✓ Request prescription refills/Request Appointment/Cancel Appointments
✓ MyChart allows patients to:	✓ Receive lab results electronically

2 MyChart Registration after the visit

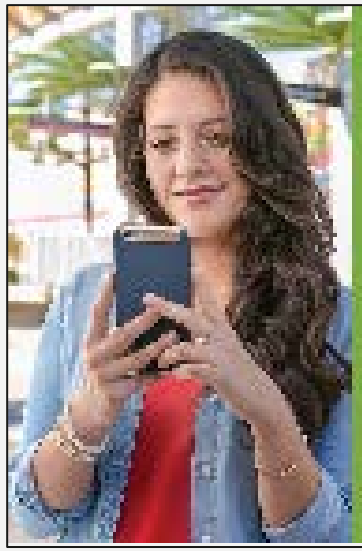
Before completing check out, complete patient's MyChart Registration

"Our E.H.R shows us that you have not registered for MyChart yet. I am able to assist you. May I have your date of birth?"

Patient Concern: "I am concerned that my information will be accessed by someone I do not want to have access"

Employee Response: "MyChart is completely confidential and secure. Only you are able to access your chart with a confidential username and password of your choice. If you would like to set up an adult or child proxy, for someone else to have access, I can assist you with that."

✓ Suggested username:	✓ Patient's first name and year of birth



Sign Up for our Patient Portal today!

Healthcare through your computer or mobile phone

- 24/7 access to doctors
- make appointments
- get lab results
- refill prescriptions
- and more!

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Visit:

https://mychart.ochin.org

Username:

_____

PATIENT STORY

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NEW CHALLENGES AND NEXT STEPS

- Challenges:
  - Fewer patients not enrolled coming into health centers
  - More staff are involved and Patient Advocate staff do not have enough patients to enroll
  - Patients are enrolled, but may not be using the portal
  - Who addresses portal inquiries (questions, medication refills, appointment requests, etc?)
- Next Steps
  - Text Message Enrollment!

QUESTIONS?