CHUG – Fall 2012
Patient Portal Design

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THE "HAYES WAY"

Our People
Ensure continued growth through our commitment to employees.

- Recognize excellence and results
- Continually improve our skills
- Be passionate about our work
- Celebrate the diversity of our teams
- Promote teamwork and collaboration

Our Process
Help healthcare professionals and their businesses reach peak performance.

- Constantly challenge our way of thinking
- Create innovative solutions
- Leverage technology to do things better

Our Clients
Build long-term client relationships through our dedication, hard work, honesty and professionalism.

- Exceed client expectations
- Make every client a reference
- Communicate honestly and clearly
- Understand what makes clients unique
- Become trusted advisors to our clients
Patient Portals - Going Above and Beyond

• Access to portals helps meet the requirements of Meaningful Use Section 170.306(d)—Electronic Copy of Health Information.

• It is no secret Meaningful Use (MU) is driving patient portal popularity.

• Portals have much more to offer than what MU requires.

• This is the time to think beyond MU requirements and design the portal to support and streamline office workflows.
Patient Portal

DESIGN CONSIDERATIONS
Patient Portals - Design Considerations

• There are several portals to choose from and most were initially designed as a stand-alone solution.
• Many portal vendors now offer integrated EMR/EHR solutions.
Patient Portals - Design Considerations

- Before committing to a vendor, first consider the unique needs and workflows of the office.

- When you are ready to select, make sure the portal version is certified for meaningful use.
Patient Portals - Design Considerations

• **Current workflows.**
  – How information will be received from the portal into your EHR.

  – For example, will a refill request come into a single persons queue or will it be designed to come into a general queue where multiple users work such as “Rx Refills”? 
Patient Portals - Design Considerations

- **Current workflows.**
  - How will information get entered into the patient’s record? Will it automatically be imported or will staff first review information and manually enter the update?
Patient Portals - Design Considerations

• **Current workflows.**
  – If you have multiple locations, how will you keep track of who handles the work?
  – If you have multiple specialties, locations, or floating providers, how will this be worked into the build and design of the portal? Will this all be lumped into one website or will you have multiple portals?
Patient Portals - Design Considerations

• **Current workflows.**
  – How are you going to identify which patients you can contact via the portal? Is there an option in your EHR to make it readily visible?
Patient Portals - Design Considerations

• Information collected and displayed
  – What information will you collect from patients and how?
  – One suggestion is to break up the registration/insurance and medical history forms to aid the patient in completing the information without “timing out” of the online session.

Your session has timed out.
Your browser session has timed out, and you have been logged off. You are automatically logged off if there is no interaction with the application for a period of time that is specified by your system administrator.
Patient Portals - Design Considerations

• **Information collected and displayed**
  - Does your portal vendor offer a “save as you go” feature for patients?
  - Is there a progress bar option that can show the patient how much they have yet to complete?
Patient Portals - Design Considerations

- **Information collected and displayed**
  - Thinking of Meaningful Use, what medical information will you make available to the patient and how easy can they access it?
  - One portal offers the option of a real time CCD document for the patient to view or print on demand.

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Patient Portals - Design Considerations

• Information collected and displayed
  – Consider having forms for patients to print out as a solution if patients are having difficulties accessing the electronic forms.
Patient Portals - Design Considerations

- **Efficiency.**
  - Use the portal technology to improve the patient experience.
  - For example, what information from the patients PM or EHR record can be defaulted in the online forms for the patient?
  - Defaulted information will expedite the registration process for the patient and also provide a second check that the information was entered into the PM or EHR system correctly.
Patient Portals - Design Considerations

- **Permission and authorization forms.**
  - Now that you are offering an electronic method of communication, be sure to include an electronic authorization form for patients to sign.
  - Patients can sign this form along with the HIPPA disclosures or wherever it makes sense in your workflow.
Patient Portals - Design Considerations

• Permission and authorization forms.
  – Some portal vendors offer an electronic signature option where patients can legally sign documents and have them transfer directly into the EHR.
Patient Portals - Design Considerations

• Security.
  – Security levels can be set to accommodate the information you want to make available to patients depending on if they are logged in.
Patient Portals - Design Considerations

- **Security.**
  - Thinking of the levels of access on the portal, what information will be made available to patients not logged in, logged in but not verified identity, and finally logged in and identity verified?
Patient Portals - Design Considerations

- **Security.**
  - Think about how you are going to securely give patients access to their information through your portal.
  - What options does your portal vendor offer to verify patient identities and will the account link to the patient’s EHR record?
  - Will identities be verified only in person? What if a patient wants to do it over the phone?
  - This is a good time to discuss features and policy on what is the best practice to protect your patient identities.
Patient Portals - Design Considerations

- Secure email.
  - One feature offered that integrates with portals is secure emails. Are you going to allow staff or patients to email? If so, think about how security and develop policies on how this will be used with the portal.
Patient Portals - Design Considerations

- **Secure email.**
  - For Example: Will you allow two-way communication between staff and patients?
  - How will the workflows be designed to support secure emails?
  - Will you allow attachments to be sent and what information will you allow?
• **Access for minors.**
  – One area to consider when designing your portal is access for minors.
  – The emancipation age for each state varies and each office has their own policies regarding what information is made available to minors and parents.
Patient Portals - Design Considerations

• **Access for minors.**
  – Ask your vendor what options for minors are available. You may need to refine your policies on minor portal account accessibility.
  – Ask your vendor if multiple logins for both parents can be created for the child’s portal account.
Patient Portals - Design Considerations

• Linking with your main website.
• Keep your main company website and your portal website separate.

– While they are meant for different purposes, you can integrate them with hyperlinks to either site.
Patient Portals - Design Considerations

- **Linking with your main website.**
  - Put your portal link on the front page of your main company website to make it easy for patients to find.
  - You can also put your locations and directions on your company website and a link on your portal to direct the patient back to your main site. This is more efficient than maintaining two lists of locations on both sites.
Patient Portals - Design Considerations

• **Reporting.**
  – Ask your portal vendor about reporting tools available.
  – You must be able to see if your patients are using the portal and how it is being used.
    • What pages are the patient’s visiting the most?
    • How long are they staying on your portal?
    • What activities did they do?
    • Of the patient’s you gave portal access, how many are actually registering?
    • Who verified their identity to have full access?
Patient Portals - Design Considerations

- **Patient-centric navigation.**
  - Consider the look, feel, ergonomics and navigation from the patients’ perspective.
  - Perhaps you put all the resources on the left side of the screen and all the action items on the right.
Patient Portals - Design Considerations

• **Patient-centric navigation.**
  – Keep your portal visually appealing with pictures or clip art and balance this with minimal supporting text.
Patient Portals - Design Considerations

- **Patient-centric navigation.**
  - Use color wisely.
  - Light grey is hard to read.
  - Only urgent items should be in Red.
Patient Portals - Design Considerations

• Patient-centric navigation.
  – Don’t underline; unless it’s a hyperlink.
  – Keep hyperlinks blue.
    • When possible, control how links behave when clicking on hyperlinks.
    • For example, when a patient clicks on a link to see your main website, make the link open in a new window rather than directing your patient away from your portal.
Patient Portal

IMPLEMENTATION CONSIDERATIONS
Patient Portals- Implementation Considerations

• **Know what you are getting.**
  – What options does your portal come “pre-packaged” and what do you have to purchase in addition to the portal?
  – For example, does the portal come with the ability for patient’s to view and pay their bill, or is that an additional add-on product you will have to purchase?
  – How is the portal designed “out of the box” and what will you need to customize?
  – Does the portal require you to buy additional hardware?
  – Lastly, what is the pricing structure? Is it a monthly fee per provider or is it a one time fee?
Patient Portals - Implementation Considerations

• **Keep it simple.**
  
  – To obtain buy-in and increase the use of the portal, make it easy for patients to use.
  
  – Keep the vocabulary simple and leave out jargon.
  
  – Use words like “My Chart” to help the patient identify the portal as an easy to use tool made for them.
  
  – Provide clear registration instructions and inform your patients about the tools available on the portal once registered.
Patient Portals- Implementation Considerations

• **Heighten awareness.**
  – Educate patients and staff about the portal in a variety of mediums.
  – Change your on-hold music to promote your portal.
  – Some offices place a kiosk in the lobby.
  – Send a Welcome to our Portal email or letter with registration instructions.
Patient Portals - Implementation Considerations

- **Heighten awareness.**
  - Encourage your providers to endorse the use of the portal at difference points of an office visit.
  - For staff, utilize internal communications, hold webinars and present the portal in team meetings.
Patient Portals- Implementation Considerations

• Options are ok.
  – Some staff members may feel the portal is adding tasks to their day.
  – Others may have faith in the benefits the portal has to offer.
  – Some patients may welcome the portal while others would rather “do it the old way.”
Options are ok.

- All viewpoints are ok.
- Regarding staff pushback, it is true that new technology can add additional tasks to the day, but it can also save time. For example, staff members will now need to check phone and portal for prescription refill requests.
- At the same time, patient satisfaction will improve, staff can process portal requests at a convenient time, and staff can communicate status of the refill request more easily.
Patient Portals- Implementation Considerations

- **Implement incrementally.**
  - To aid the staff during this transition, implement your portal in stages.
  - Start with the Meaningful Use requirements, and then add features when your staff is ready.
  - For example, perhaps you implement Rx Refill Requests now and do Online Bill Pay in a few months. This will give everyone time to adjust to the changes in workflows.
Patient Portals- Implementation Considerations

- **Be there.**
  - Be prepared to support patients and staff using the portal.
    - When patients call or have problems, who will handle these questions?
  - Educate your staff who will encounter patient complaints and what questions they can ask.
    - More often than not, patient questions are regarding medical information and not IT related.
    - With that said, sometimes patients call with technical questions related to the portal and they do need assistance from IT. Both your clinical staff and IT staff will need to be prepared to help.
Patient Portals - Implementation Considerations

• **Ask for feedback.**
  - Last but not least, ask staff and patients for feedback!

  • Unless you hear about concerns, you will not have the chance to fix them.

  • Encourage your staff to get feedback from the patients as well and ask the patient if they can be contacted regarding their portal experience.
Patient Portal

IF YOU BUILD IT
THEY WILL COME
Patient Portals- If you build it they will come

• **A personal story from experience:**
  – One medical center implemented the portal thinking their older patients would not use it.
  – They were pleasantly surprised.
Patient Portals- If you build it they will come

• A personal story from experience:
  – Not only was it popular with this demographic, but the information sent from older patients via the portal was far more detailed than the paperwork they filled out in the office!
  – Why?
    • At home, patients are not rushed
    • They have access to all their personal files.
    • Guided questions on the portal give patients a clear opportunity to provide information they were not otherwise expecting to provide when they came to your office.
Patient Portals- If you build it they will come

• A personal story from experience:
  – For example, a patient may not think their last CT scan was relevant to their upcoming office visit.
  – Strategically placed questions on the portal such as “What tests have you had recently and who did you see?” will save time and return more complete information from the patient.
Patient Portals- If you build it they will come

• In Conclusion:
  – Designing a patient-friendly portal has advantages for your office and your patients.
  – If you make it easy for patients, you will dramatically reduce call volume.
  – Requests sent via the portal also provide the staff opportunities to complete tasks at convenient times.
  – Careful planning and implementation will add to its – and your – success.
In Closing…Questions?

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