

# What Can a Patient Portal do for My Practice?

Research and Real Life



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# Collaborative, online, healthcare services

- Approximately 45 percent of medical practices in the United States have purchased some form of a clinical portal solution
- How many are using them?

Learning your way around Personal Patient Portal ...

The screenshot shows the 'Personal Patient Portal' interface. The left sidebar contains navigation menus: Questions/Concerns, Messages, Account Information, Intake Forms, Review, and Appointments. The main content area includes a 'Welcome Bill Test' section, a 'Personal Health Record' section with a 'Request your PHR' button, and a 'Reminders' table. Callouts provide detailed explanations for various elements:

- message center for sending /receiving communications to/from our staff**: Points to the 'Messages' section.
- ask our staff questions that they will respond to via e-mail**: Points to the 'Questions/Concerns' section.
- welcome screen**: Points to the top banner area.
- complete with name/address/birthday/emergency contact**: Points to the 'Account Information' section.
- use for updating pharmacy/address/contacts/employer**: Points to the 'Account Information' section.
- reset password for optimum security**: Points to the 'Account Information' section.
- complete for surgeries/allergies/immunizations**: Points to the 'Intake Forms' section.
- view referrals created/sent on your behalf**: Points to the 'Review' section.
- view/print/download complete health record**: Points to the 'Review' section.
- view past appointments - dates/times/reasons**: Points to the 'Appointments' section.
- convenient health record request link**: Points to the 'Request your PHR' button.
- indicates when inbox has messages**: Points to the 'Messages' section.
- displays past statements**: Points to the 'Current Statement' link in the 'Review' section.
- displays current billing statement**: Points to the 'Current Statement' link in the 'Review' section.
- menu to access specific lab reports - individual lab results**: Points to the 'Lab / Diagnostic Reports' link in the 'Review' section.
- lists alerts/upcoming vaccines**: Points to the 'Reminders' table.
- searches previous visits for treatments/recommendations**: Points to the 'Historical Appointments' link in the 'Appointments' section.
- uses tabs to list allergies/problems/procedures/vitals/medications/immunizations/labs/social/family histories**: Points to the 'Personal Health Record' section.

Reminder	Last Done	Due
Annual Flu Vaccine 6-35 Mos		Currently Due
Diabetes Alert(s)	2011-02-14	02/14/2012
Diabetes Alert(s)		Currently Due
Diabetes Alert(s)		Currently Due
Acute Pharyngitis alerts		Currently Due
Asthma Alerts		Currently Due

# From our Leaders....

- The transition from volume-based to value-based care requires patient communications modalities that respond to the new alignment of care incentives
- In the not-too-distant future, patients may send you pictures or video showing them performing prescribed rehabilitation exercises or function tests for you to evaluate. Surgical patients might send you photos of the surgical incision site so that you can monitor for postoperative infections
- Using a patient portal for effective, timely communications can increase your efficiency and productivity.



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# Would You Use a Portal?

- Who banks online? Books travel? Reservations? Facebook?
- Why? Convenience and reduce time spent and costs

*Patient portals, however, represent an opportunity for patients and clinicians to work together to achieve improved health outcomes through coordination of care, sharing of pertinent data and records, and continuous tracking of patient health indicators (e.g., blood-pressure and glucose levels)*



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# Power Shift with Risk

- Clinicians will no longer be the gatekeepers of health information
- Costs are responsibility of the practice
  - Inherent responsibility on the part of healthcare organizations: ensuring that appropriate resources and education tools are available
  - Non-reimbursable
- Empowering patients is an important element of the patient centered care and MU movements
- Patient has an educated voice
- Patient has more access to provider



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# Risk?

## **May 1 2014 Attestation figures** CMS's Office of eHealth Standards and Services

- 50 of the 225 eligible professionals that have attested for the 2014 reporting year have done so for Stage 2; and
- Just four of the 30 eligible hospitals that have attested for the 2014 reporting year have done so for Stage 2
- However, meaningful use registration has reached:
  - Nearly 95% among hospitals eligible for the Medicare program;
  - 57.8% among health care professionals eligible for the Medicare program; and
  - 28.9% among those eligible for the Medicaid program



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# Functionality

- Appointments
- View their lab results
- Request prescription refills
- View personal health record and visit summaries
- Receive educational materials
- Send and receive secure e-mail messages to and from clinic staff
- Complete intake forms (medical, social, and family history)
- Receive appointment and health reminders
- View past billing statements and pay current amounts due
- Update demographic information as it changes
- View and request referrals



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# Value Proposition

- Completing intake forms electronically, in the comfort of their home
  - Can find medication names
  - Automatically imported into the patients' progress note in advance of their appointment
  - Demos, MU, History, questions
- Rural patients have a more effective communication medium
- Chronic diseases are easier to manage
- Research access
- Personal record keeping (compliance)



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# MU Require a Portal?

- Core Measure 12- Provide patients with an electronic copy of their health information (including diagnostic test results, problem list, medication lists, and medication allergies) upon request
- Menu Set Measure 5- Provide patients with timely electronic access to their health information (including lab results, problem list, medication lists, and medication allergies) within four business days of the information being available to the eligible provider

Replaced with in Stage 2

- Core Measure 7- Provide patients the ability to view online, download, and transmit their health information within four business days of the information being available to the eligible provider
- Core Measure 13- Provide clinical summaries for patients for each office visit



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# CORE Measure – 7 - Patient Electronic Access to Health Info Workflow

Example (from Kryptiq Patient Portal) – Once exported by provider, patient can view their chart online and transmit to a 3rd party.

The screenshot displays two side-by-side panels from a patient portal. The left panel, titled "My Medical Summary", shows a navigation menu on the left with categories like Personal Information, Advance Directives, Allergies, Immunizations, Insurance, Lab Results, Medications, Plan of Care, Problems, Procedures, Social History, and Vital Signs. The main content area shows a "Chart Summary" for "Jarold J" and "Brother Y". It includes a "Full Chart - Madison Medical Center P. A." section with generation and recipient information, and a patient profile for "Alice Aaron" with details on birth date, sex, marital status, and address. The right panel, titled "TRANSMIT CHART", features navigation buttons (Previous, Next, Review, Submit) and a form for transmitting the chart. It includes a note about required fields, the title "TRANSMIT CHART (Jarold J Crandall)", and a list of available charts for selection.

**My Medical Summary**  
My Medical Summary

Jarold J | Brother Y

**Chart Summary** [Download] [Print] [Send]

Full Chart - Madison Medical Center P. A.

Generated by: Vitera Integy Product Suite on July 11, 2013  
Intended Recipient: Export

Office Contact Info:  
34 Sycamore Street Suite 3 Madison, CA, 95653  
tel--1-916-555-7654 (Work)  
tel--1-916-555-7657 (Work)

Alice Aaron

**Birth Date:** December 11, 1940      **Address:** 918 Great Potomac Lake Dr  
Madison, CA, 95655

**Sex:** Female      **Patient Contact Info:** tel:+1-916-555-5568 (Home)

**Marital Status:** Widowed

**TRANSMIT CHART**

[Previous] [Next] [Review] [Submit]

\* Required fields are marked with an asterisk.

**TRANSMIT CHART (Jarold J Crandall)**  
New page

\* **Send To (Email Address):**

Select chart

- JaroldJ.Crandall-Chart-Summary-29072013.xml
- JaroldJ.Crandall-Chart-Summary-29072013.pdf

# CORE Measure – 7 - Patient Electronic Access to Health Info Changed in Stage 2 (Moved from Menu to Core)

## Measure – 2 measures combined into 1

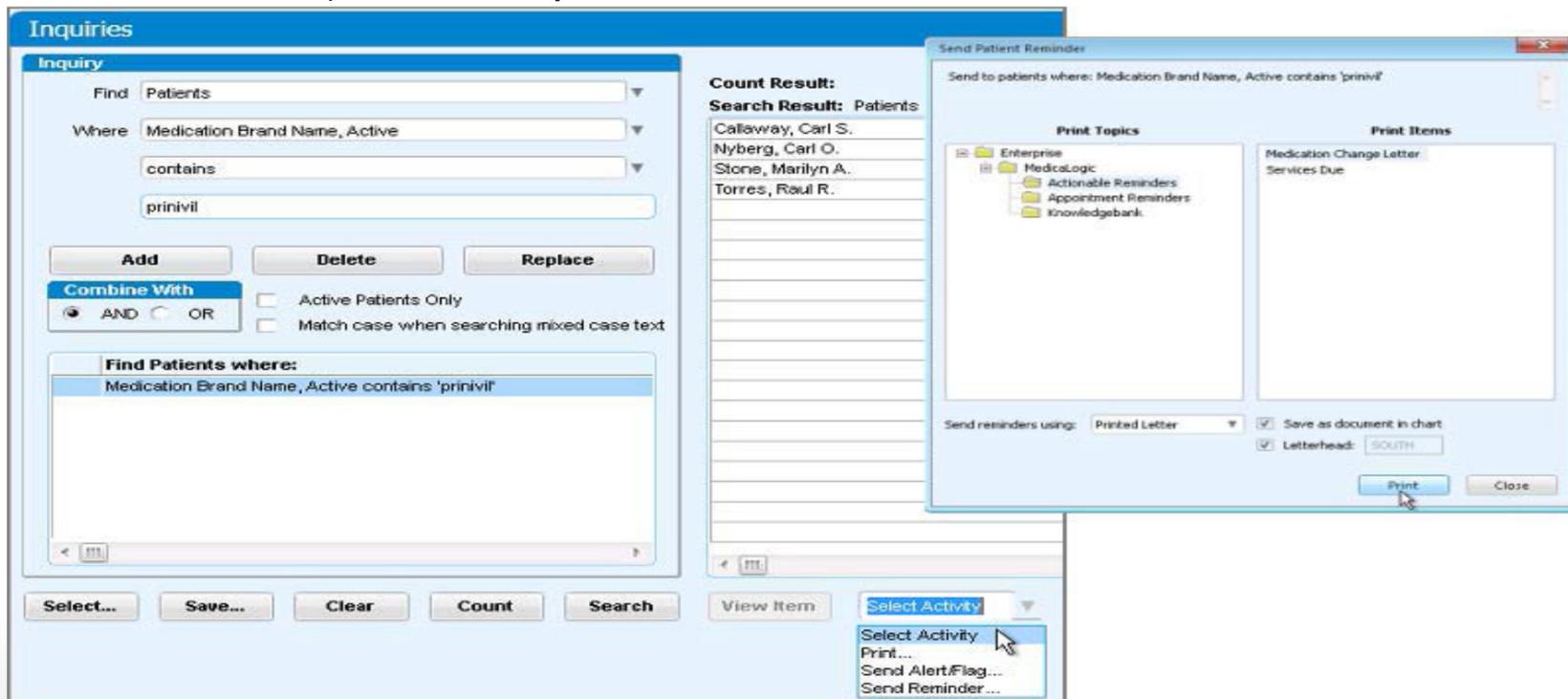
- Change from **>10%** of all patients of the EP have timely access to their health information within **3 business days** to: **>50%** of all unique patients seen by the EP during the EHR reporting period are provided timely (available to the patient within **4 business days** after the information is available to the EP) online access to their health information
- Change from **>50%** of all patients of the EP who request an electronic copy of their health information are provided it within 3 business days to **>5%** of all unique patients seen by the EP during the EHR reporting period (or their authorized representatives) **view, download, or transmit** to a third party their health information



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# CORE Measure – 12 – Patient Reminders Workflow

After configuring and running an inquiry to identify a list of patient, select **Send Reminder** in the Activity list to set up and print a reminder letter (form the “Actionable” folder) for each patient.



T H

# CORE Measure – 13 – Patient-Specific Education Resources Changed in Stage 2: (Moved from Menu to Core)

## Measure

- Changed from >10% of all unique patients seen by the EP are provided patient-specific education resources to **patient-specific education resources identified by CEHRT are provided to patients for >10% of all unique patients with office visits seen by the EP during the EHR reporting period.**

## Workflow

- Use **Info button** to look up and/or print patient/context-specific education materials for **medications, problems, and lab results.**

## Configuration

- Info button vendor must be configured in Setup/Administration



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# CORE Measure – 17 – Secure Electronic Messaging **New** in Stage 2

## **Measure**

- A secure message was sent using the electronic messaging function of Certified EHR Technology by more than 5% of unique patients seen during the EHR reporting period.

## **Workflow**

- Use a supported Secure Messaging integrated application.



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# CORE Measure – 17 – Secure Electronic Messaging Configuration

## Kryptiq Secure Messaging

The screenshot displays the Eastside Family Medicine secure messaging interface. The main window is titled "Send a Message to My Provider (Walter S. Caldwell)". It includes a navigation bar with "Home", "Inbox", "Appointments", "Medical Records", "Medical Forms", and "Contact". The "Inbox" tab is active, showing a list of messages. The message composition area is visible, with fields for "Organization" (Eastside Family Medicine), "Provider" (Winston MD, Harry), "Subject" (Non urgent medical), and "Details" (Hi Doctor....). A red warning message states: "Do not use this form for Emergencies. If you are having an emergency, call 911 now." The interface also shows a sidebar with navigation options like "New Message", "Inbox (15)", "Sent", "Drafts", "Templates", "Deleted", "User", "EMR", "Delegates", and "Admin".

**System of Record Patient Matching Information**

Patient Name:	Walter S. Caldwell
Patient Sex:	Male
Patient DOB:	03/02/1946
Patient MRN:	MR-846-624
Patient ID:	721
External ID:	Not Available

**Send a Message to My Provider (Walter S. Caldwell)**

Send a Message to My Provider

**Do not use this form for Emergencies. If you are having an emergency, call 911 now.**

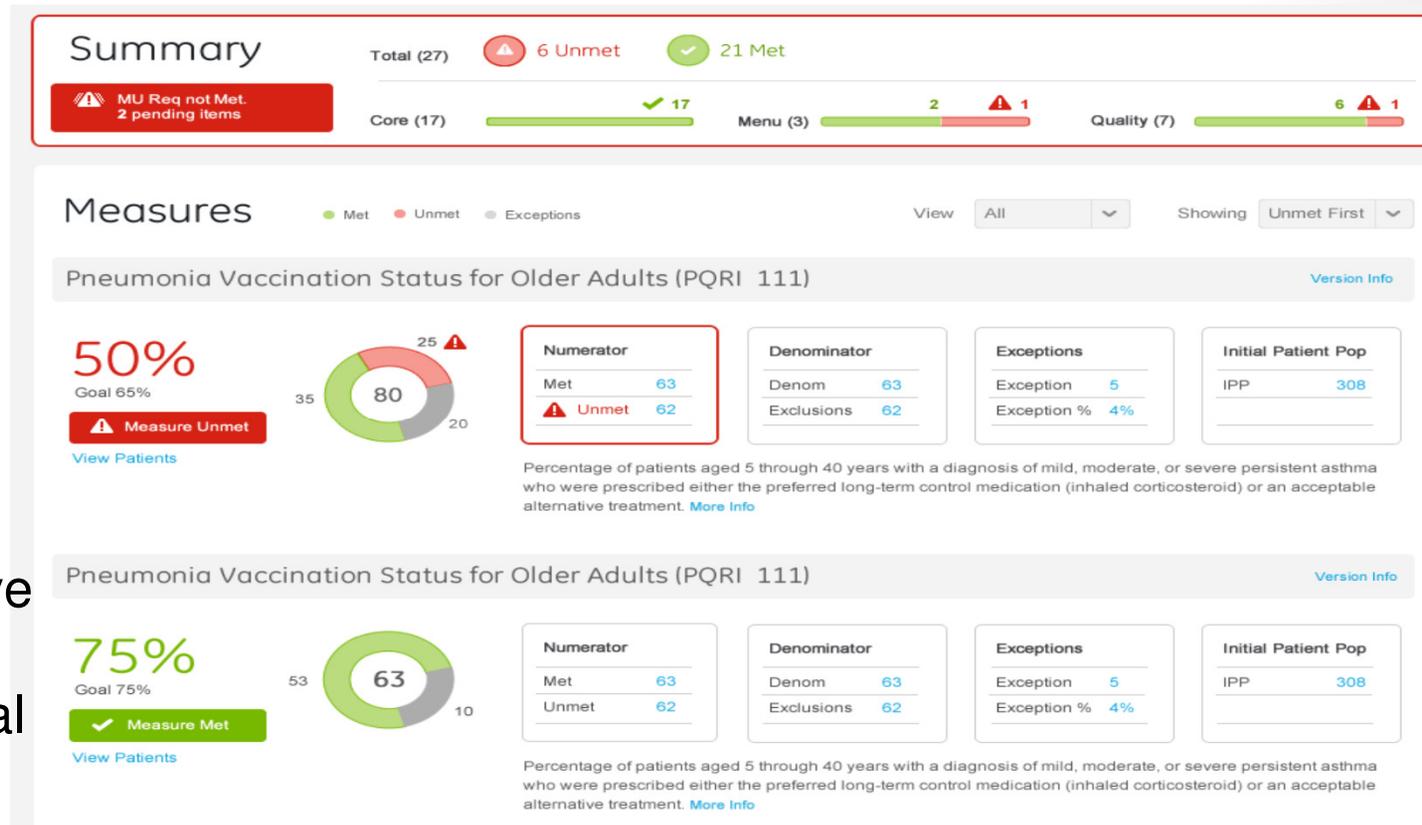
Subject:  
Non urgent medical

Details: (Please provide as much information as possible)  
Hi Doctor....

# Clinical Quality Reporting (CQR)

Use CQR for submission to CMS/state

•Use CQR dashboard to visualize how each provider is performing relative to each Functional/Clinical Quality Measure



# PCMH Standard 1- Enhance Access and Continuity

1. Electronic copy of health information within three days to more than 50% of patients who request it (correlates with meaningful use Core Measure #12)
2. Electronic access to current health information within four days to at least 10% of patients (correlates with meaningful use Menu Measure #5)
3. Clinical summaries provided for more than 50% of office visits within three days (correlates with meaningful use Core Measure #13)
4. Two-way communication
5. Request for appointments or prescription refills
6. Request for referrals or test results



## Key Lessons Learned

- Planning
- Implementation
- Workflow



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# Policies – In Writing!

- Adolescents who seek care independent from their parents, particularly sensitive reproductive-related health care
  - Have the same expectations and rights
  - Ensuring confidentiality for these minor patients introduces a high level of complexity to handling
- Practice response time
  - Who, when
- Privacy and Security
  - Sensitive issue management
  - Certified portal and messages
  - Procedures for monitoring the portal and include a clear disclaimer regarding monitoring
- Patients who attempt to use the portal for emergencies should receive an alert notification



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# Planning

- Drivers -MU, PCMH, Payment Reform
- Benefits-Save staff time-appointment requests
- Barriers–*Digital Divide*, Language, Literacy-patient population
- Analyzing these factors in the context of your practice
- Actionable and measurable parts with clear accountability for each
- Hard and soft costs
- Is portal a good name?
- What will you use it for?



# Workflow

- Who can help enroll the patient?
- Documentation to meet measures
- Pre-completed forms
  - What I want to discuss with my doctor
  - Demos and insurance
  - HX and FH
  - MU questions
- Message management
  - Does a doctor have to manage a patient message?
- Monitor patient outcomes and track recovery between office visits -may also improve patient satisfaction



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# Implementation

- Patient engagement is key
- Enrollment process
- Marketing materials — posters, pamphlets, buttons, slide shows, and videos on monitors in the waiting room — direct staff or provider outreach
- Messages while on hold—you can request appointment or get results on portal
- Advanced capabilities
- Training patients and staff

**Do you have an ongoing health problem like arthritis, diabetes, heart disease, or lung disease?**

Does it **1** stop you from doing things you enjoy?

**Learn what you can do to feel better and take control of your health.**

**Take Charge!**  
MANAGING YOUR HEALTH

**2** Chronic or ongoing health problems can be frustrating. They can get in the way of your everyday activities—those things you would love to do. Controlling symptoms, like pain or fatigue, can be difficult. The costs of doctors' visits and medications can add up. If you have more than one health problem, it can be harder to do things that keep you healthy, like staying fit and watching your weight.

**3** **HOW CAN THESE CLASSES HELP ME?**

- Self-management education workshops and physical activity classes can help with a variety of chronic ongoing health problems like arthritis, diabetes, heart disease, and lung disease.
- They can help you learn ways to reduce symptoms like pain and fatigue, get around more easily, and do more things on your own.
- Studies show that the classes are safe and they work. The Centers for Disease Control and Prevention recognize their effectiveness and your doctor recommends them.
- The classes are open to everyone.
- They're affordable, easy to get to, and taught by trained instructors who understand the health problems you face.

**WHAT CAN I DO?**

Don't let your health stop you from doing the things you enjoy. Take charge by signing up for a self-management education workshop or physical activity class being offered in your community. They'll help you learn how to manage your health and stay independent. And they don't involve more medications.

*"These health problems weigh you down. It's so easy to give up. The classes teach us what we can do about them."*

*"It never dawned on me before that there are other ways I could manage besides medication. The pain and fatigue don't go away. But you learn to manage them, instead of letting them manage you."*

Fold

Fold



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# Success stories

- Kaiser Permanente, which has one of the most expansive patient portal deployments in the nation, reports that 53.3% (218,456) of eligible members in its Northwest region were registered patient portal users.
- VA- My Health<sup>e</sup>Vet -make informed decisions and manage your health care
- American Academy of Family Physicians, 41 percent of family practice physicians use portals for secure messaging, another 35 percent use them for patient education, and about one-third use them for prescribing medications and scheduling appointments



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# Use Case Rheumatology

- Impact of **patient**-accessible electronic medical records in rheumatology: use, satisfaction and effects on empowerment among patients
  - 54% of respondents with Internet access had viewed their **EMR**
  - Respondents were positive about the ease of use and usefulness of the **portal** and reported very few problems
  - 44% reported feeling more involved in their treatment
  - 37% felt they had more knowledge about their treatment



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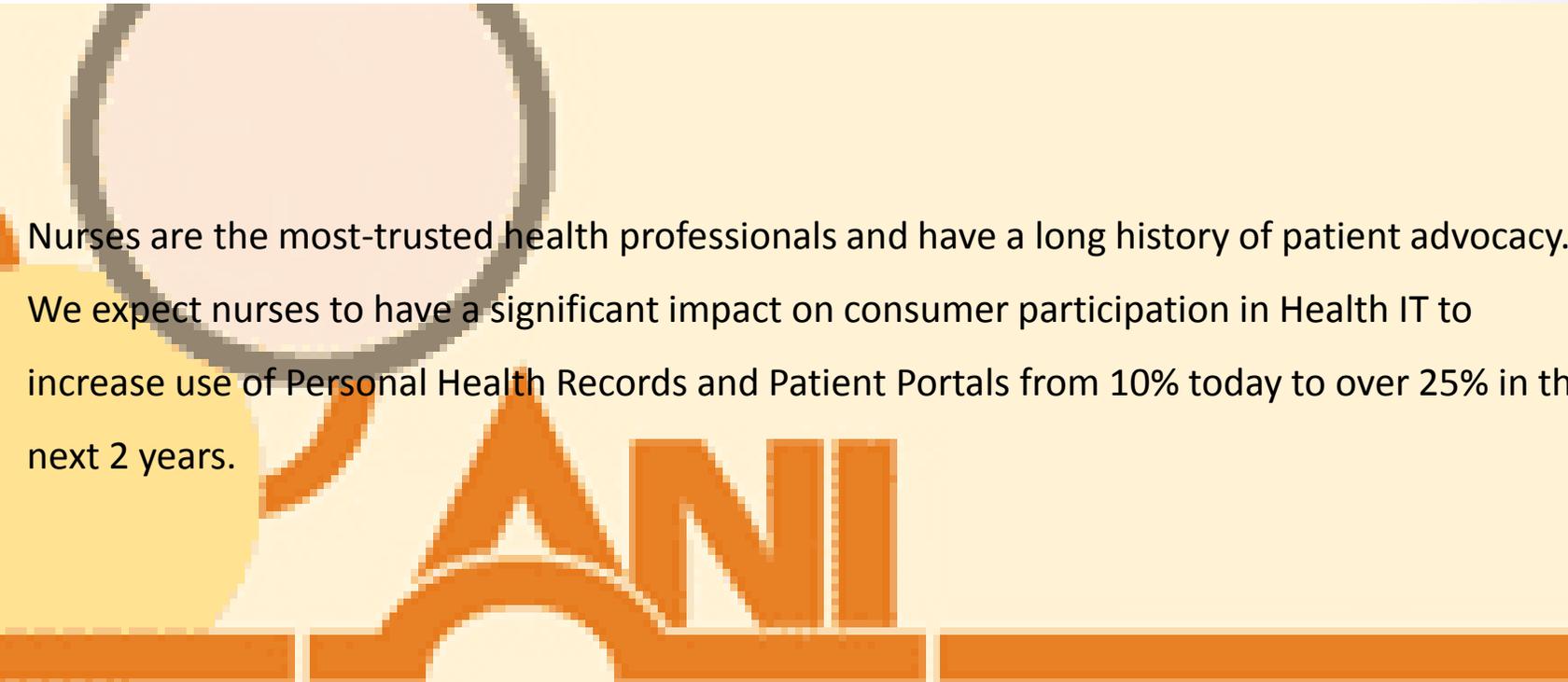
# Use Case Cancer

- Using a Patient Portal for Electronic Communication With Patients With Cancer: Implications for Nurses
- Electronic communication with patients presents an opportunity to move away from the idea of a patient visit being a single in-person event to an ongoing relationship
- In the outpatient setting, oncology nurses care for patients along the entire care continuum—from diagnosis, through treatment, and to survivorship or death
  - The incorporation of secure messaging to oncology practice offers nurses and patients a unique alternative that allows more frequent and timely communication between nurses and patients



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# Alliance for Nursing Informatics Pledge to Support Consumer eHealth 2013



Nurses are the most-trusted health professionals and have a long history of patient advocacy. We expect nurses to have a significant impact on consumer participation in Health IT to increase use of Personal Health Records and Patient Portals from 10% today to over 25% in the next 2 years.

About ANI

# GE Solutions

- Integrated for more advanced functionality
  - Kryptiq Portal and Secure Messaging
- Numerous other HIEs and Portals connected



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# Kryptiq Chart Summary

The image shows a screenshot of a website's navigation menu. At the top, there is a horizontal menu with five items: Home, About Us, Contact Information, My Medical Summary, and Online Patient Services. A mouse cursor is hovering over the 'My Medical Summary' item. Below this menu is a vertical dropdown menu. The first item in the dropdown is 'Personal Information', which is followed by a list of medical categories: Advance Directives, Allergies, Immunizations, Insurance, Lab Results, Medications, Plan of Care, Problems, Procedures, Social History, Vital Signs, Chart Summary, and Chart Access History. A large black bracket on the left side of the dropdown menu groups all these items together. A blue dashed arrow originates from the 'My Medical Summary' item in the top menu and points to the 'Chart Summary' item in the dropdown menu.

Home	About Us	Contact Information	My Medical Summary	Online Patient Services
------	----------	---------------------	--------------------	-------------------------

- Personal Information**
- Advance Directives
- Allergies
- Immunizations
- Insurance
- Lab Results
- Medications
- Plan of Care
- Problems
- Procedures
- Social History
- Vital Signs
- Chart Summary
- Chart Access History

# Kryptiq Pin Generator

Home: 503-645-6677 Work: 503-531-7771  
Patient ID: 110-TEST011 Insurance: BHI (Futura) Group: BHI19743 Contact By: Home/Alt Phone

Probs Meds Refills A

Medications Alerts/Flags Flowsheet Orders Documents Update

08/14/2014 10:11 AM by Paula Infeld Alerts(0)/Flags(0)

Drug interactions Attach Properties...

Pin Generator: Martha G. Clancy

Patient Portal Chart Access PIN

This form creates a unique patient portal PIN for the patient.

Auto Generate

These changes will take place when this document is signed

Pin Generator Form v1.5

Prev Form (Ctrl+PgUp) Next Form (Ctrl+PgDn) Close

# **NORTH MISSISSIPPI HOSPITAL CENTER**

Patient Portal Experience

Lori Pruitt, MIS Physician Analyst Supervisor

## WHO WE ARE

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- » North Mississippi Health/Medical Center cover 24 counties in north Mississippi and Alabama
- » North Mississippi Medical Clinics is a network of more than 30 primary and specialty clinics; and nursing homes
- » Our main focus is to provide convenient access to quality health care
- » NMHS is a 2012 recipient of the prestigious Malcolm Baldrige National Quality Award

## WHO I AM

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- » North Mississippi Health/Medical Center cover 24 counties in north Mississippi and Alabama
- » I manage a team of nurse informaticists that manage all MU, PCMH, and regulatory issues, as well as training and testing of applications
- » I manage multiple platforms for our EMRs, as well as HIE and portal services

# HOW WE DID IT

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- » Approach
- » Process Changes
- » Resources
- » What I would do Differently?

# Thoughts?

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- <http://www.chcf.org/patient-portals>
- Electronic copies of all marketing materials are available on the CDC Web site at [www.cdc.gov/arthritis/interventions/marketing-support/1-2-3-approach](http://www.cdc.gov/arthritis/interventions/marketing-support/1-2-3-approach)



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