Moving the Needle on Active Patient Portal Use
A Celebration of Innovation in California's Safety Net

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Safety Net Patient Portal
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Welcome!

MEETING OBJECTIVES

Part 1

- Learn Priorities From Each Other

- Hear Survey Results

Part 2

- Learn What is Trending

- Learn Innovations That are Working in the Safety Net

Part 3

- Share Ideas on:
  - Decision Points on What To Do Next
  - How Portals Can Be Used to Improve Outreach

- Q&A

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AGENDA

- Quick Vote

- Share Your Pre-Conference Survey Responses

- Share Portal Deployment Innovations!
    - Trends that are Useful to Know

    - Los Angeles DHS – Redeployment Example

    - Six Keys to Portal Redeployment Success with Examples from California Safety Net Organizations

- Weighing Your Next Steps – What Are Your Decision Points?

- Share Potential Portal Uses for Outreach

What would be the one most wanted portal function if you asked your providers – to best engage their patients – to best save time for everyone?

View Allergies

Schedule Non-urgent Appt

View Labs

View Immunizations

Secure Message/e-mail

Make Payments

Download and Complete Forms

Review Meds

Update Contact Info

Request Refill

View Educ Materials

What would be the one most wanted portal function if you asked your providers – to best engage their patients – to best save time for everyone?

View Allergies 83%

Schedule Non-urgent Appt 42%

View Labs 91%

View Immunizations 83%

Secure Message/e-mail 58%
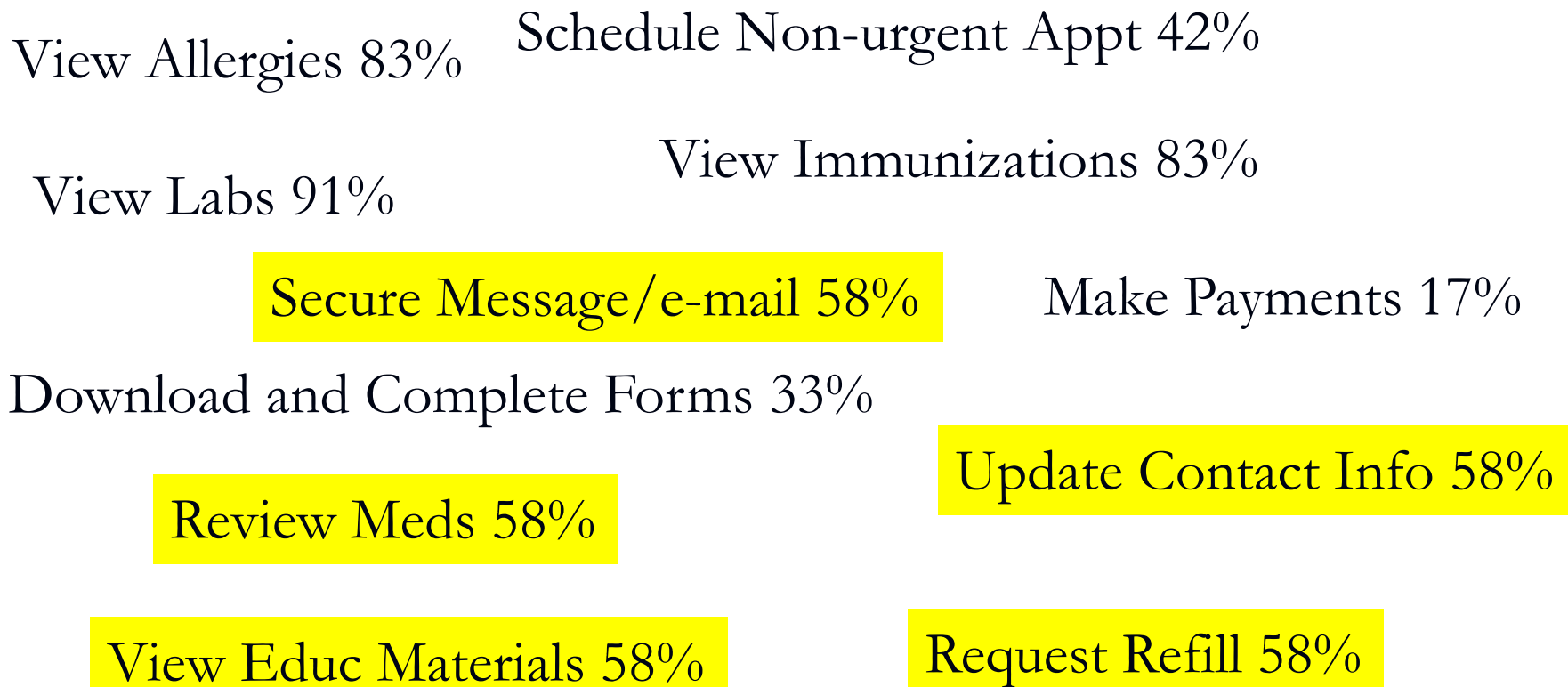
Make Payments 17%

Download and Complete Forms 33%

Update Contact Info 58%

Review Meds 58%

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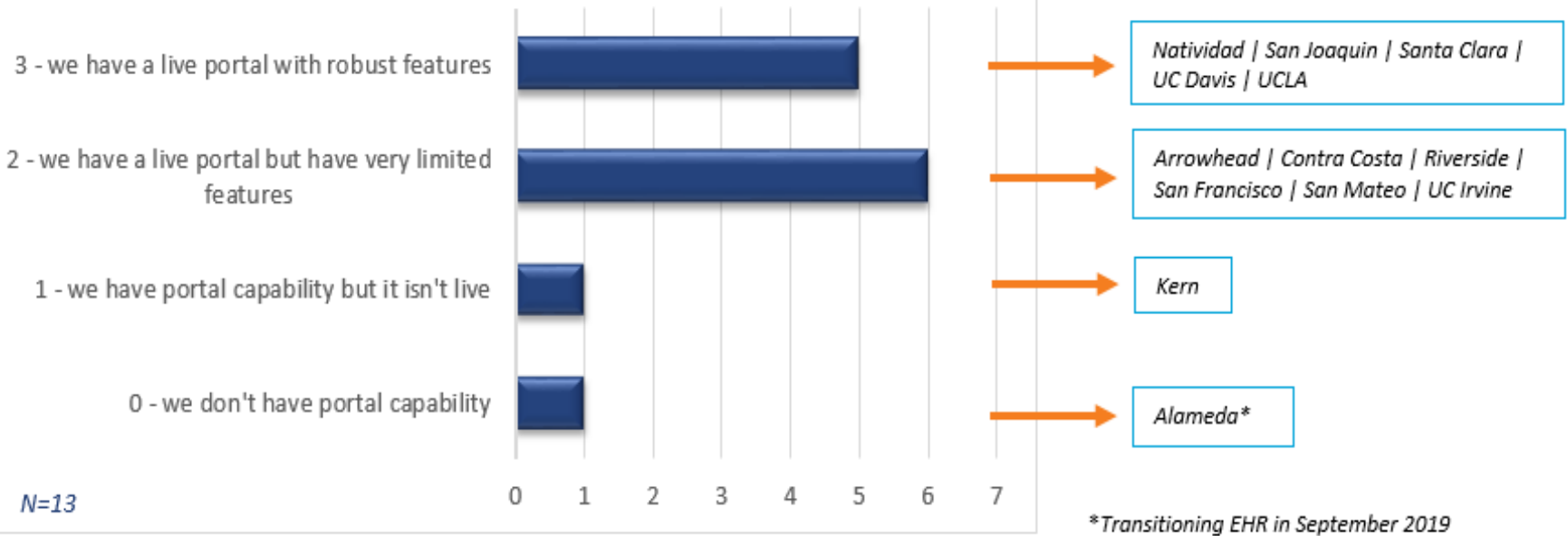
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View Educ Materials 58%   Request Refill 58%

Final Discussion Question

What is one new thing you learned today to improve use of the patient portal to reduce care gaps/improve patient <u>outreach</u>?

Survey Results

Your Survey Questions Highlighted Throughout

Which of the following best describes the level at which your organization currently uses patient portals?

3 - we have a live portal with robust features → Natividad | San Joaquin | Santa Clara | UC Davis | UCLA

2 - we have a live portal but have very limited features → Arrowhead | Contra Costa | Riverside | San Francisco | San Mateo | UC Irvine

1 - we have portal capability but it isn't live → Kern

0 - we don't have portal capability → Alameda*

N=13

*Transitioning EHR in September 2019

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How many patients have signed up for the patient portal (approximately)?

- PHS generally have around **25-35%** of patients signed up for a patient portal

Note: "Active" User % is Underreported

What differences are others seeing in enrollment versus active use?

Describe some of the current challenges of implementing and using secure messaging for your system.

Challenge	Value
Provider & staff time, adoption, consistent use	5
Patient uptake	5
Connecting patients to the right providers, departments, and types of appointments	3
Insufficient reporting capabilities	2
Insufficient functionality for specific patient population(s)	2
Improper use of portal by patients	1
Inadequate technology support for staff	1
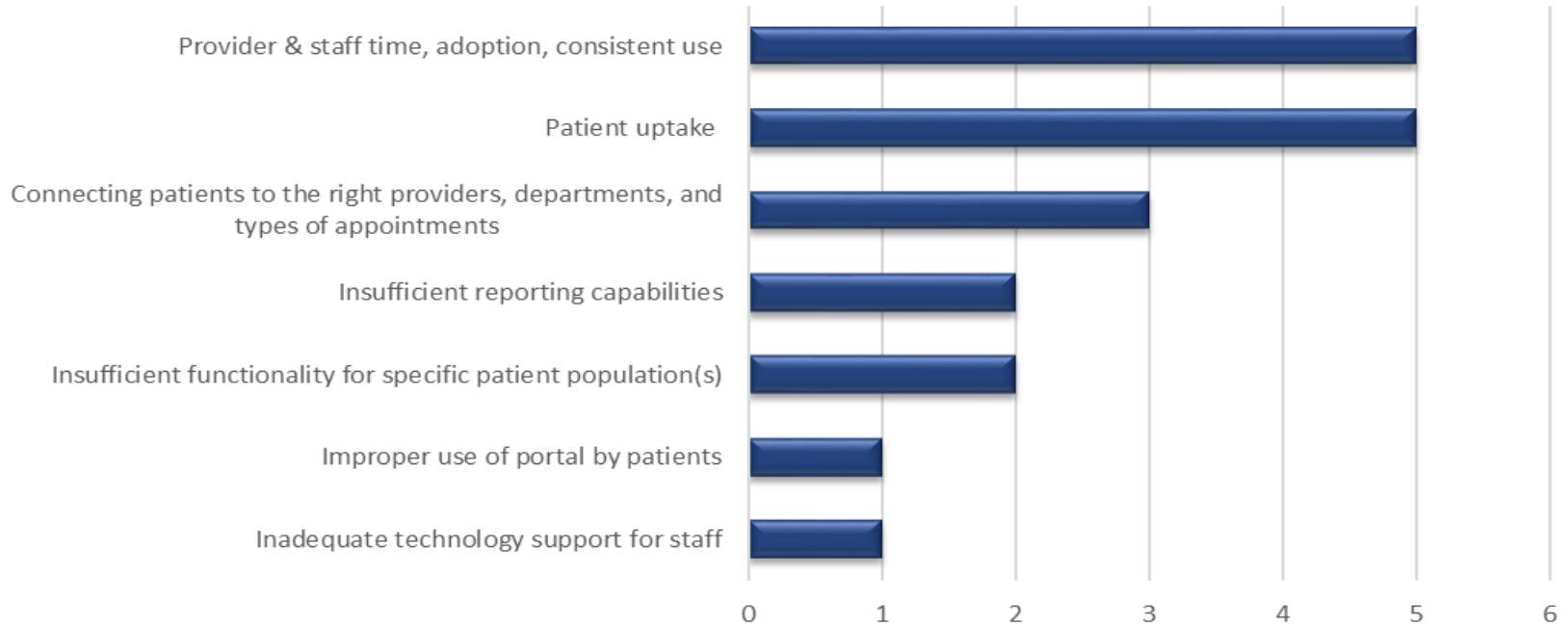
Successful Patient Portal Innovations

Trends in Portal Operations That Are Useful to Know

DELETE COOKIES?!

What's The Landscape?

Meaningful Patient Engagement
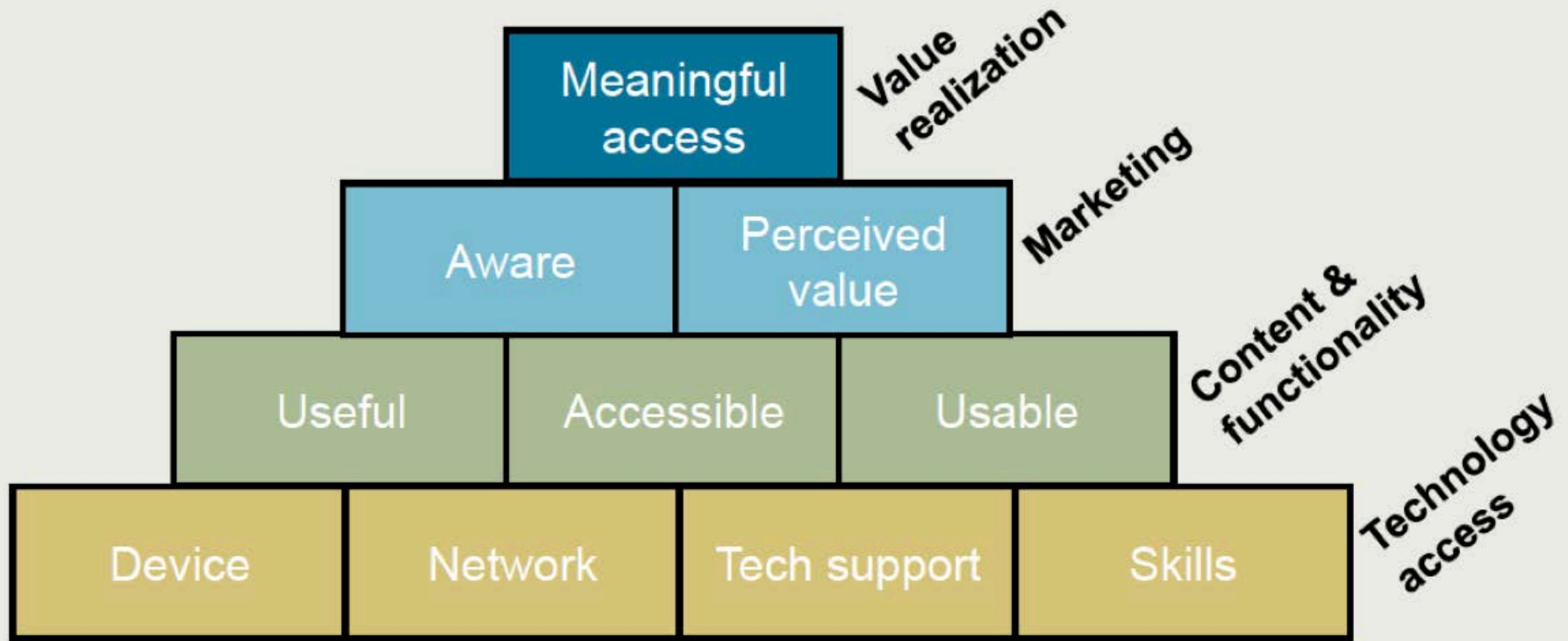
Kaiser Presentation on Disparities in eHealth, 10/26/11, Tim Kieschnick

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National Trends

Drivers

- ❑ **Information Sharing**
  - Care Records
  - Bi-directional Communications
  - MU $
- ❑ **Marketing**
  - Strategic differentiator
- ❑ **Future**
  - Secure Communication
  - Inreach and Outreach Options

Benefits

- ❑ **Patients:**
  - View Lab Results
  - Secure messaging
  - Manage Appointments
  - Refill Prescriptions
  - View/Download Record
  - Complete Forms
  - Pay Bills

- ❑ **Clinics/Providers:**
  - Administrative efficiencies (less calls)
  - Save time on routine tasks
  - More time for critical patients

Barriers

- ❑ **Patients:**
  - "Digital Divide"
  - Literacy
  - Language
  - Privacy concerns

- ❑ **Providers:**
  - Potential for added work
  - Lack of reimbursement
  - Inappropriate use by patients
  - Liability for security breaches

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Development Problems	Solutions
Patient engagement Privacy and confidentially concerns Awareness Usefulness and usability Digital access Health literacy Socio-economic disparities	Patient-centered design Training and education[a]- Promotional initiatives[a]
Health service provider engagement Workload and workflow Skills and capacities	Workflow engineering Workflow training[a] Notifications and signaling of urgency

What do we know ___ t developing patient portals? a system ___ terature review

Terese Otte-Trojel[1], Antoinette ___ omas G Rundall[2], Joris van de Klundert[1]

Interest is not the barrier

- 70% of patients in the SF safety net interested in e-communication w/ providers:

  90% of pts w/ current email account, 50% of pts w/out email account

There is interest!

The State of the Digital Divide and Implications for Patient Outreach

Courtney Rees Lyles, PhD
Center for Vulnerable Populations
Division of General Internal Medicine at
Zuckerberg San Francisco General Hospital
University of California, San Francisco

Portal Enrollment and Active Use
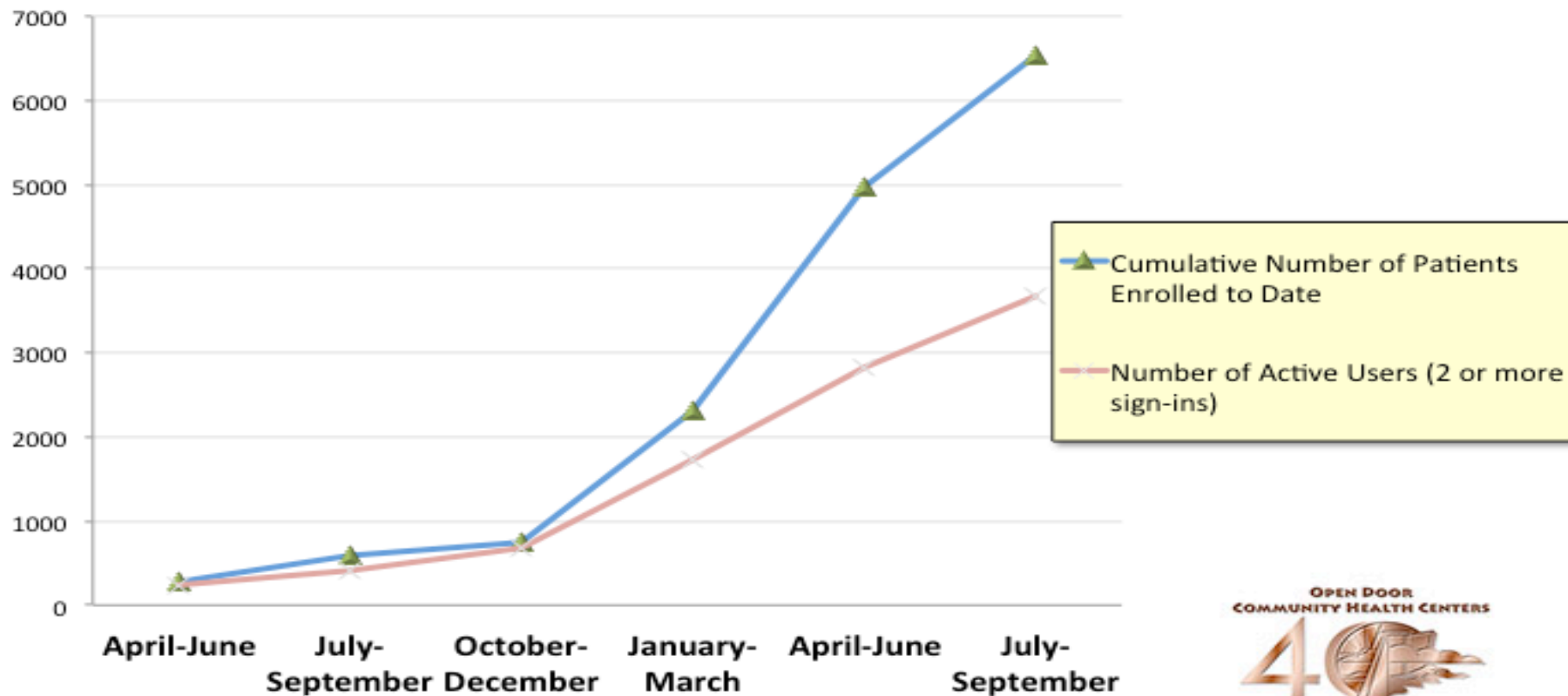
What is on the Horizon?

- 211/Unite Us Connections to Resource Support, including more detailed fields that help connect to resources (REAL & SOGI)

- Forms via eClipboard – previsit, ongoing care, annual surveys, etc

- Enrollment and Insurance AI – autopopulate information, including more detailed fields that help connect to resources

- Secure Login to Suite of Communication Options - Telemedicine Visits

- Input options and analytics for self-wear/personal devices (BP, Glucose, Healthy Lifestyle)

LA DHS Patient Portal Redeployment:

An Example of Redeployment Success

LA DHS: "Patient Portal is the Foundation for Secure Patient Engagement in the Digital Age"

"Purposeful" Redeployment Strategy

- Senior Leader Push
    - Engage Providers – Champions Helped Build Simple Training Toolkit
- Survey and Site Visit
- Strategic Planning Senior Leader Meeting – Everyone Voted on Top Action Items
- Program Management Tracking Tool - Clear Action Item Owners
- Marketing Support for Top Action Items
- Top 5 Action Items:
    - Start Live Scheduling
    - Put Lifestyle Reminders (ELM, etc) on Portal
    - Make User Experience for Spanish-primary speakers easier
    - Allow Phone Numbers to Be Used To Enroll
    - Develop Process to Send Appointment Reminders

How do I get providers/staff to <u>want</u> to use it?

Senior Leader "Bump"

Please join the challenge to enroll our patients in the DHS Patient Portal! Using the Portal, patients can check up on their lab and radiology results, communicate with their provider and his/her team, refill prescriptions, reschedule appointments, among other functions. This is a great way for patients to receive information and services they need right from their homes. Please encourage the patients you interact with to enroll today!
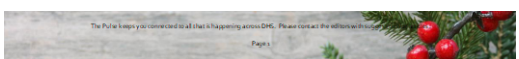
Listen to Your Providers

"What is it about the portal that you love – that makes it worth the clicks"

" What is it that your patients would love about the portal – to overcome the enrollment/password reset/clicks hassle?"

How do we identify value to providers and staff to make patient engagement part of their processes?

Listen to the Patient - Focus Groups

- Focus groups at Harbor-UCLA and Mid-Valley (Dr. Alejandra Casillas)
  - English and Spanish speakers

- "My appointment letter came 2 days after my scheduled first oncology appointment. It would be great to see appointments on the portal."

- "I waste time on Facebook. I would rather be checking on my health just like I check my bank account."

Listen to the Patient - Surveys

Patients are interested in the portal and have access to the internet

- 167 patients surveyed across DHS sites this year

  - 73% report access to the internet

  - 65% have not heard of MyWellness

  - 16% report being enrolled in MyWellness

  - 68% report being interested in enrolling in MyWellness

IT Support
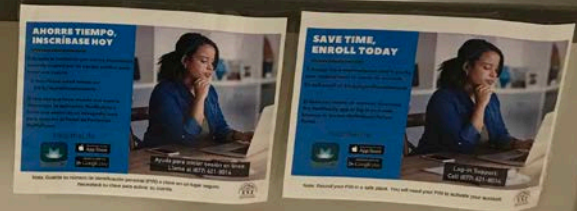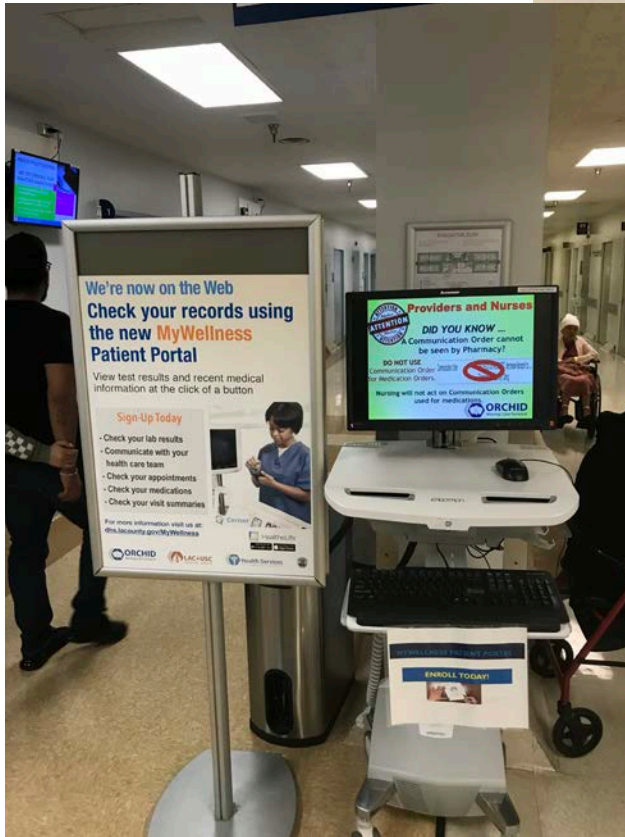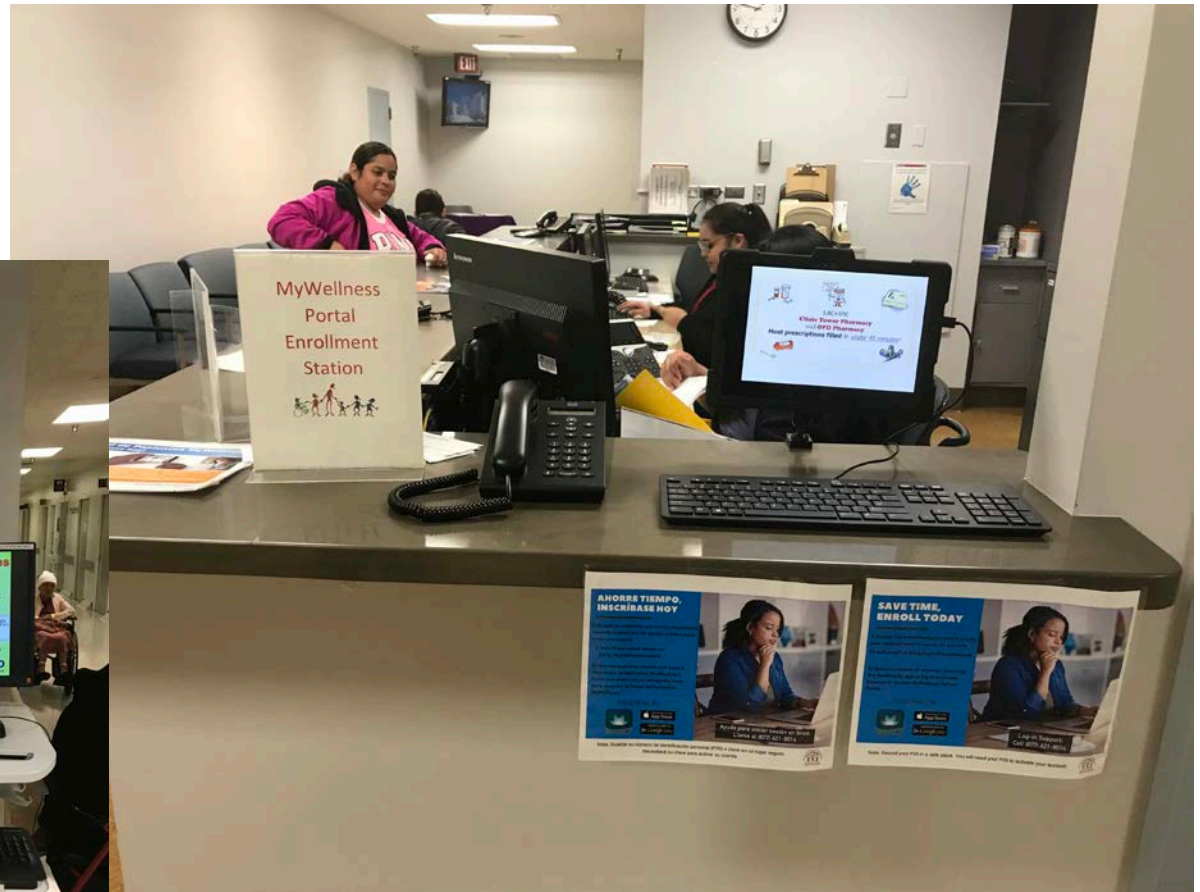
Targeted Marketing

Friendly and Effective Competition

January Winners: Pizza Party

DPH Engagement
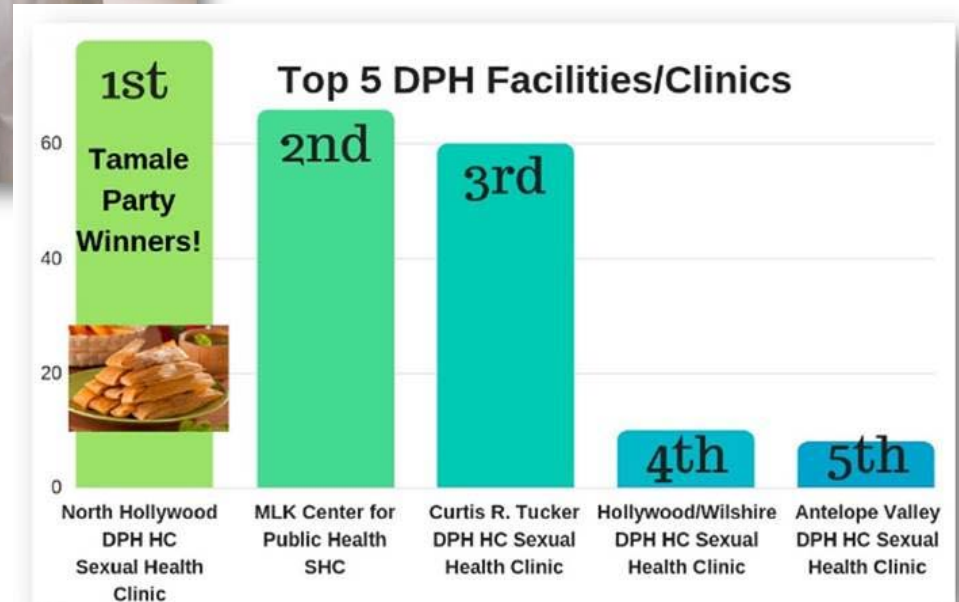
Training – Led By Innovative Champion

- Primary Care Workgroup Subcommittee on MyWellness
  - Barbara Rubino (LAC+USC), Jen Chen (Mid-Valley), Shari Doi (PAC)

Enrollment and Active Use

WHAT WE'VE ACCOMPLISHED

☑ Doubled the number of active users

50k
Enrolled
Patients

25k
Monthly
Active Users

75%
Use
Mobile

Quotes From Staff After 6 Months

- *Providers are starting to really like it – it saves time and increases the quality of patient care!*

- *Providers report more comprehensive visits with portal users*

- *Providers report portal patients participate more in shared decision-making*

- *Saves time for everyone – major reduction in admin task time/calls*

Future Directions

Future Goals

Short-Term Goals

- Create a Virtual Patient Advisory Group
- Improve Functionality and Usability
- Upgrade Patient Education
- Engage Specialty, Nursing, Inpatient leaders
- eClipboard

Long-Term Aspirations

- Telemedicine and Video Visits
- Texting
- Plug in your home device (glucometer, etc)
- Customer Relations Management (CRM) tool
- Remote Monitoring

Show Movie Clip

Six Keys to
Portal Redeployment
Success

Examples From California Safety Net Organizations

1. Strong Leadership
2. Focus on What Really Drives Portal Use
3. Focus the Marketing
4. Staff Engagement
5. Supportive IT
6. Comprehensive Metrics

1. Strong Leadership
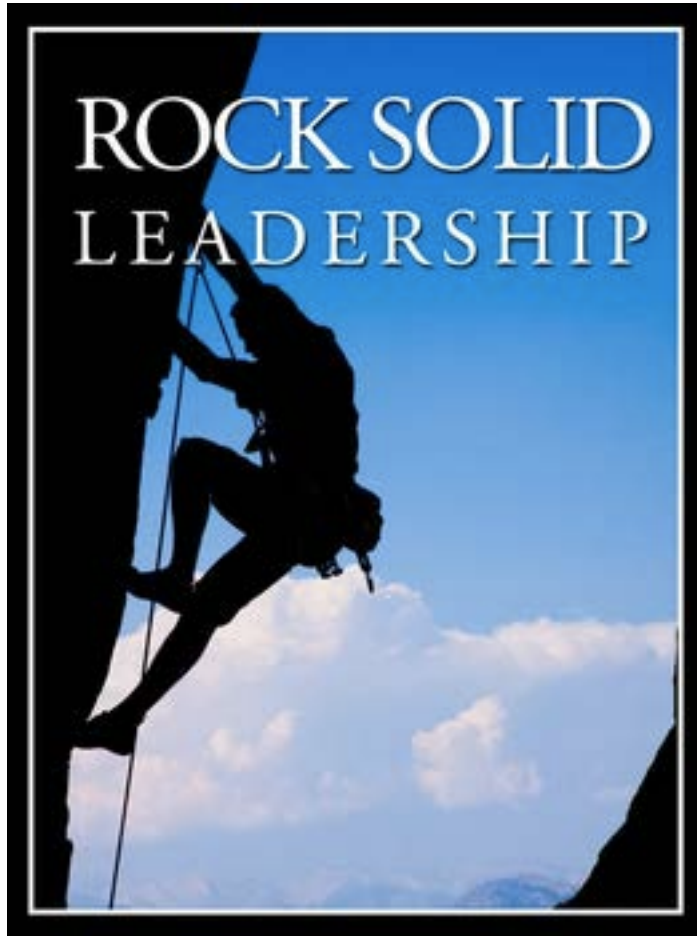
Dedicated team leadership

Multidisciplinary Deployment Team

Detailed strategic planning and participatory execution

Accountability

Our Value Proposition

- *We are improving access to care through easy to use technology by streamlining workflow, increasing patient engagement, and improving patient/provider communication.*

Best Practices

Planned Parenthood California Central Coast

- 3 Key initiatives for successful implementation

  - Strategic Workshop

  - MyCare Portal Re-Launch

  - Monthly Dashboards
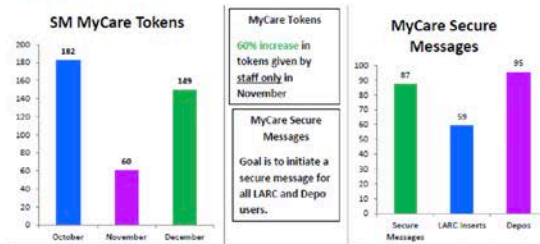
Sarah's SM Team

Planned Parenthood
Care. No matter what.

Planned Parenthood California
Central Coast

- **Create a portal team, commit to regular meetings, document meetings, hold each other accountable.**

Native American Health Center

Valerie Arnold, Health Information Systems Project Manager
Eulalia Valerio, Director of Member Services

Team Impact: Each team member brought different areas of knowledge and consideration to our portal planning, with emphasis on our Members

Golden Valley Health Centers

Sheena Truong
Training and Project Coordinator
Golden Valley Health Centers

Spreading Innovations Outcome Webinar

Keep pushing for the goals, even when there are setbacks because the result of hard work and commitment is worth it to the Team and to your staff.

2. Focus on What Really Drives Use

"It's a simple stress test—I do your bloodwork, send it to the lab, and never get back to you with the results."

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User Friendly and Useful!

Development Problems	Solutions
Patient engagement	Patient-centered design
Privacy and confidentially concerns	Training and education[a]
Awareness	Promotional initiatives[a]
Usefulness and usability	

What do we know about developing patient portals? a systematic literature review; Otte-Trojel T, et al. J Am Med Inform Assoc 2016;23:e162–e168. doi:10.1093/jamia/ocv114, Review

Learn from Your Patients

"We learned that just getting people logged on is a significant barrier."

San Francisco Health Network

Learn From Your Providers

"What is it about the portal that you love – that makes it worth the clicks"

" What is it that your patients would love about the portal – to overcome the enrollment/password reset/clicks hassle?"

Best Practices

Patient Surveys

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Meet Patients Where They Are

■ If you want to improve use in the Spanish-primary speaking population:

  ■ User friendly and correct language use on portal pages

  ■ Engage cultural connections – promotoras, family support structures

  ■ Engage specific uses – migrant worker father on heart medication…

  ■ Marketing should reflect the target community

How do best increase use in the Spanish-speaking population?

Target High Value Uses

- Opening "Live-Scheduling" feature – we are very excited to expand this to other clinic locations

3. Focus The Marketing

Dedicated and Responsive Marketing Support

Health Services
LOS ANGELES COUNTY

Los Angeles County Department of Health Services
MyWellness Patient Portal

MyWellness Marketing & Communications Roadmap

This document provides a framework ... ng the MyWellness Patient Portal to patients to achieve the following objectives:

- Create awareness and understanding of the benefits of MyWellness
- Motivate patients to enroll in MyWellness to manage their health care activities
- Build acceptance and confidence in using MyWellness to manage health related activities

Target Audiences

- Ambassador and Patient Advocacy Groups - Provide instructions, educational materials, ...isting... setting up MyWellness accounts to patients.

**Dedicated
Marketing
Name for Portal**

Best Practices

PIPER – Eisner's Patient Portal
Eisner Pediatrics & Family Medical Center

Joey Torres
IT Director
Eisner Pediatrics & Family Medical Center

Piper!

Foothill Community Health Center (FCHC)
HEALTH CONNECT

Receiving Your Appointment Reminders Has Never Been So Easy

Connect to our FREE patient website. It's fast, easy and you never have to listen to on hold music again!

- Review upcoming appointments
- Safely Email Your Doctor
- View Lab Results
- Request Prescription Refills
- View Medical Records and after visit summaries

Sign Up Today!

For more information ask the front desk or go to:

https://health.healow.com/foothillclinic

Foothill Community Health Center

Solicitar Su Cita Nunca Ha Sido Más Fácil.

Es rápido, fácil y nunca tendrá que escuchar música en espera otra vez!

- Revise sus próximas citas
- Envíe un correo electrónico seguro a su medico.
- Vea los resultados de laboratorio.
- Solicite relleno de medicamento.
- Vea los expedientes médicos y el resumen de su vista

¡Inscríbase hoy!

Para más información pregunte en Recepción o visite la pagina web:

https://health.healow.com/foothillclinic

Foothill Community Health Center

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New Brochure

Northeast Valley Health Corporation
a california *health*+ center

Get CONNECTED!

FREQUENTLY ASKED QUESTIONS

1.) Can I give access to my family member who cares for me?

Yes, you can grant access to those who are caring for you and overseeing your health care. With your permission, they will be able to schedule appointments, request prescription refills, and handle other healthcare needs.

2.) What kind of questions can I ask on the Patient Portal?

You will be able to ask your Provider and Care Team any non-urgent medical questions about your lab results, medications, or your health issues.

3.) How do I know my health information is secure?

NEVHC follows strict (HIPAA) practices to protect your information. The data on your Patient Portal is safe as long as you do not share your log-in information with others.

MY PATIENT PORTAL INFORMATION

My Provider:

My Care Team Members:

My Portal User Name:

Password Clue:

For more information or to get help with your account, call:

(818) 979-7444
or your NEVHC Health Center Business Office.

www.nevhc.org

Get CONNECTED

Rev. 05/17   NEV-551

NEVHC PATIENT PORTAL

Manage your health and **CONNECT** with your Provider and Care Team.

- EASY   • SAFE
- QUICK   • CONVENIENT

NEVHC CORPORATE OFFICE: (818) 898-1388
1172 N. Maclay Avenue • San Fernando, CA 91340

Northeast Valley Health Corporation
a california *health*+ center

Foothill Community Health Center (FCHC)
HEALTH CONNECT

4. Staff Engagement

What are 1-2 lessons you have learned?

- Providers are a great marketing tool for enrollment

- The portal is worth the investment in time & energy – more patients on the portal → less work for call center

ALTURA
CENTERS FOR HEALTH
a california *health* center

- **The biggest impact we've seen from this solution:**

- Focus on the "low hanging fruit", determine what the practice does most consistently and apply portal technology to assist in existing workflows.

- Get a provider onboard early, having our CMO onboard with Patient Portal yielded increased utilization quickly.

- "Quick Vids", record basic portal function workflows and make those recordings available to staff utilizing patient portal.
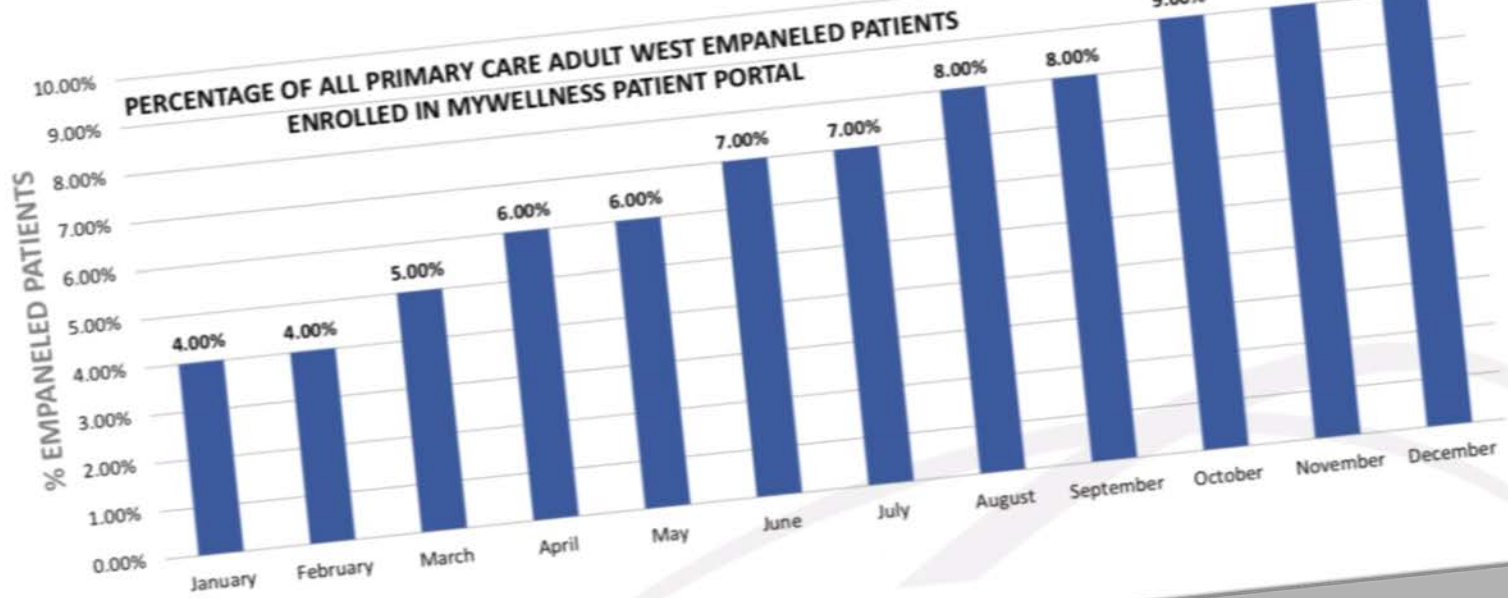
Best Practices

Innovative Clinical Champions

Health Services
LOS ANGELES COUNTY

MYWELLNESS PORTAL ENROLLMENT RATE

PERCENTAGE OF ALL PRIMARY CARE ADULT WEST EMPANELED PATIENTS ENROLLED IN MYWELLNESS PATIENT PORTAL

January 4.00%
February 4.00%
March 5.00%
April 6.00%
May 6.00%
June 7.00%
July 7.00%
August 8.00%
September 8.00%
October 9.00%
November 9.00%
December 10.00%

PIPER – Eisner's Patient Portal
Eisner Pediatrics & Family Medical Center

Joey Torres
IT Director
Eisner Pediatrics & Family Medical Center

Starbucks Gift Card for staff member team with highest enrollment

LA DHS Enrollment Competition

MyWellness Patient Portal Enrollment Competition Kicks Off

By Damiyah McKell and Ismael Chinchilla

On November 1, 2018, DHS kicked off a department MyWellness Patient Portal enrollment competition for staff MyWellness Patient Portal is a website and mobile app that allows patients to take control of their health. Patients are able MyWellness to:

- Schedule appointments
- Refill prescriptions
- Message their provider and medical team
- View lab and radiology results
- View provider notes

When staff help patients sign up for the portal, lines our waiting rooms can be reduced since so many routine actions be handled online. This will help us improve direct care for the patients in our clinics, ER's and hospitals.

The competition is as follows: Staff invite patients to register for the MyWellness Patient Portal during any stage of their hospital and clinical visit (Intake, Clinical, Pharmacy, Labs etc.). Once patients receive the email, they can register online and start managing their health.

The competition will last for three months from November 2018 to January 2019. At the end of every month, the service team with the highest number of enrollments will be rewarded with a celebratory party: a Pie Party in November 2018, a Tamale Party in December 2018 and a Pizza Party in January 2019. The persons with the highest individual number of enrollments in November 2018, December 2018 and January 2019 will be featured in a marketing campaign (three separate winners).

...impact of MyWellness Patient Portal is al... felt. "J... patient avoided an ER... ing asthma by... er patients have wonderful family car... municate with the clinic via the portal. My patients love being able to see their lab results and read my notes. I personally save time by messaging patients through the portal instead of relying on repeated phone calls and voicemails," said Dr. Anshu Abhat, Director of Digital Patient Engagement.

For more information on how to enroll patients or the competition visit: bit.ly/patientportalsharepoint. For specific questions on how to enroll patients or the competition details email: maketing@dhs.lacounty.gov or call (626) 525-5333.

My Wellness Patient Portal
Competition Update
December Winners!

5. Supportive IT

Key Take-Away Points for Health Systems

Approaching health tech as an IT solution will fail. Needs to be integrated across clinic workflows and approached as a shift in care delivery. Usability challenges and language barriers remain.

Can I customize the portal options?

- Find out what the vendor offers in the current contract – are we using the portal to its fullest capability?

Challenges and Solutions

- **Our biggest challenge in this last year:**

Texting Vs Patient Portal

- *Portal is better positioned for clinical discussion regarding care.*

Best Practices

Portal Help Desk Report
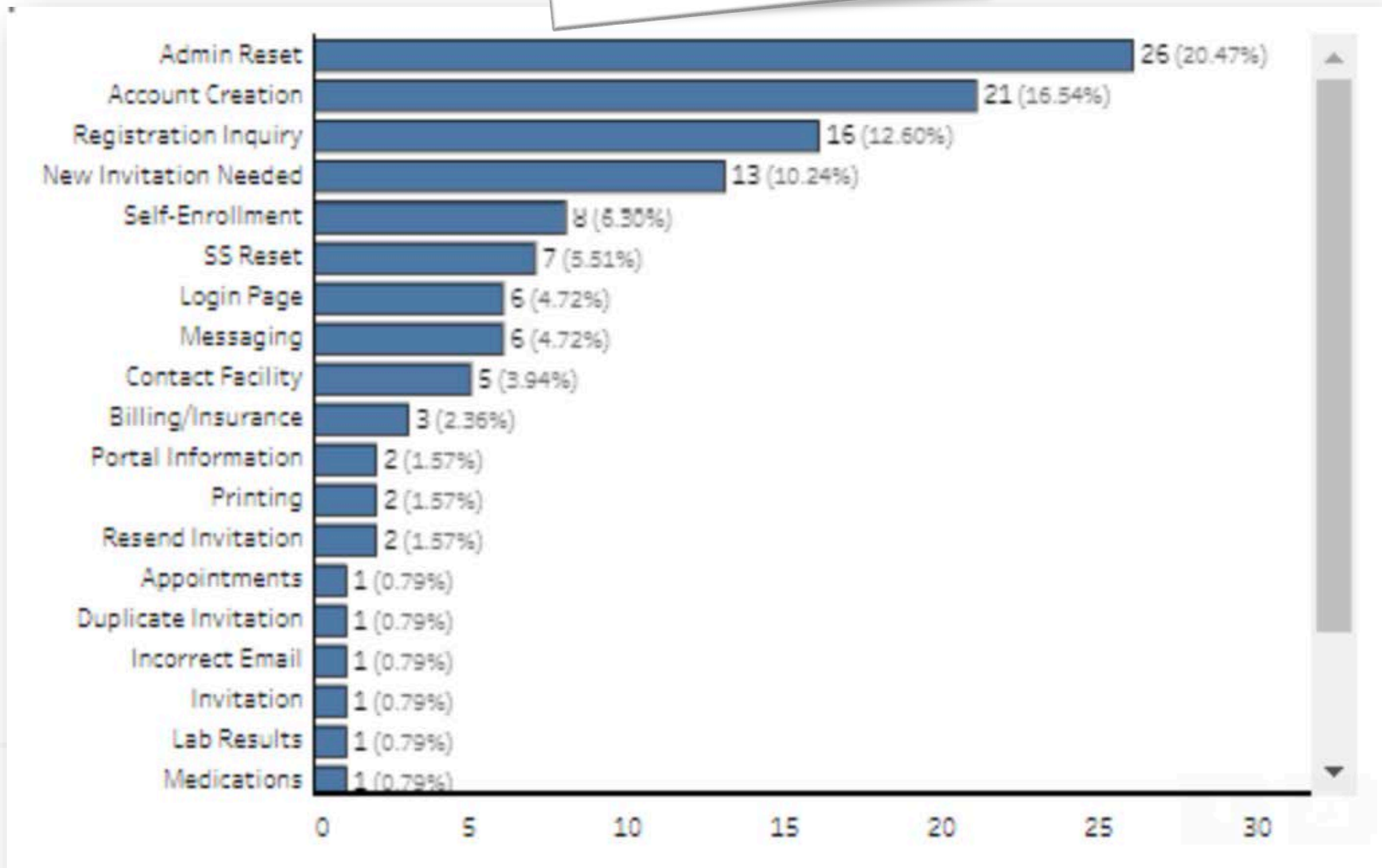
Customized Web Landing Page
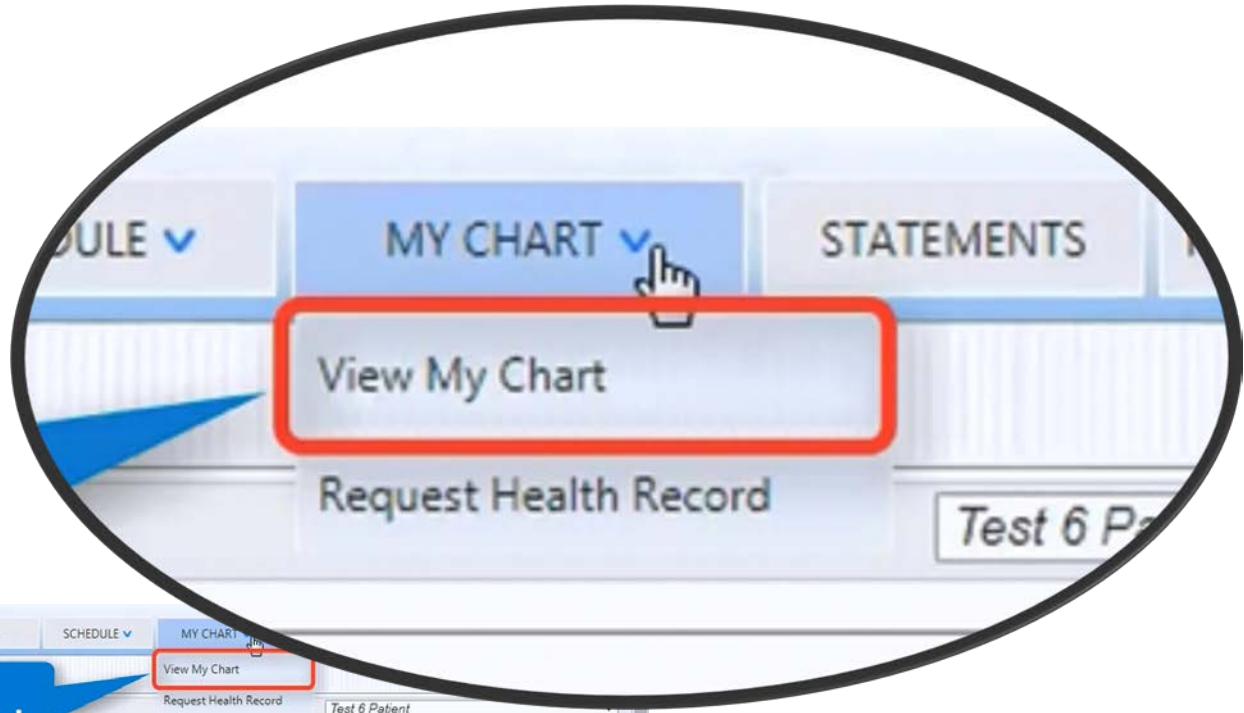
To view your Medical Records, click on "View My Chart"
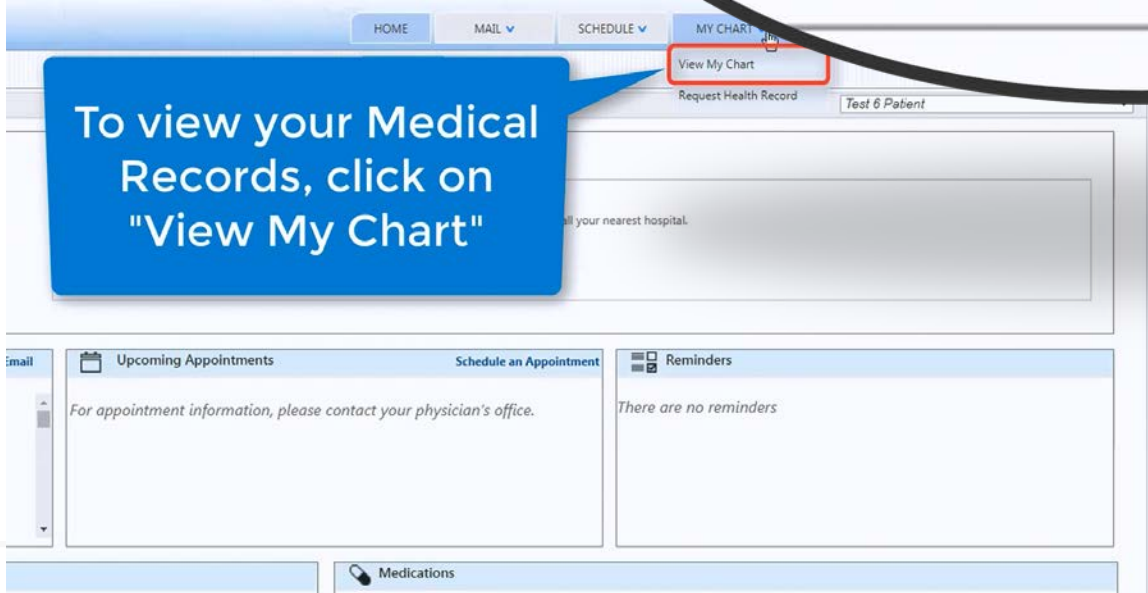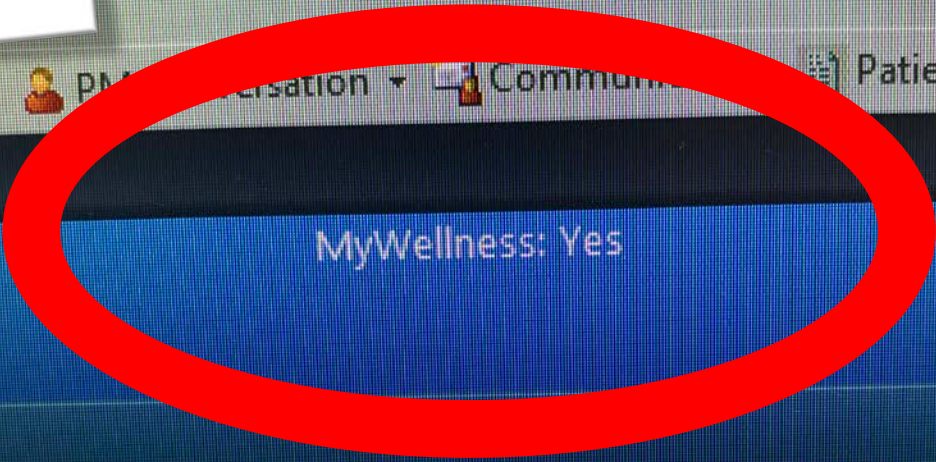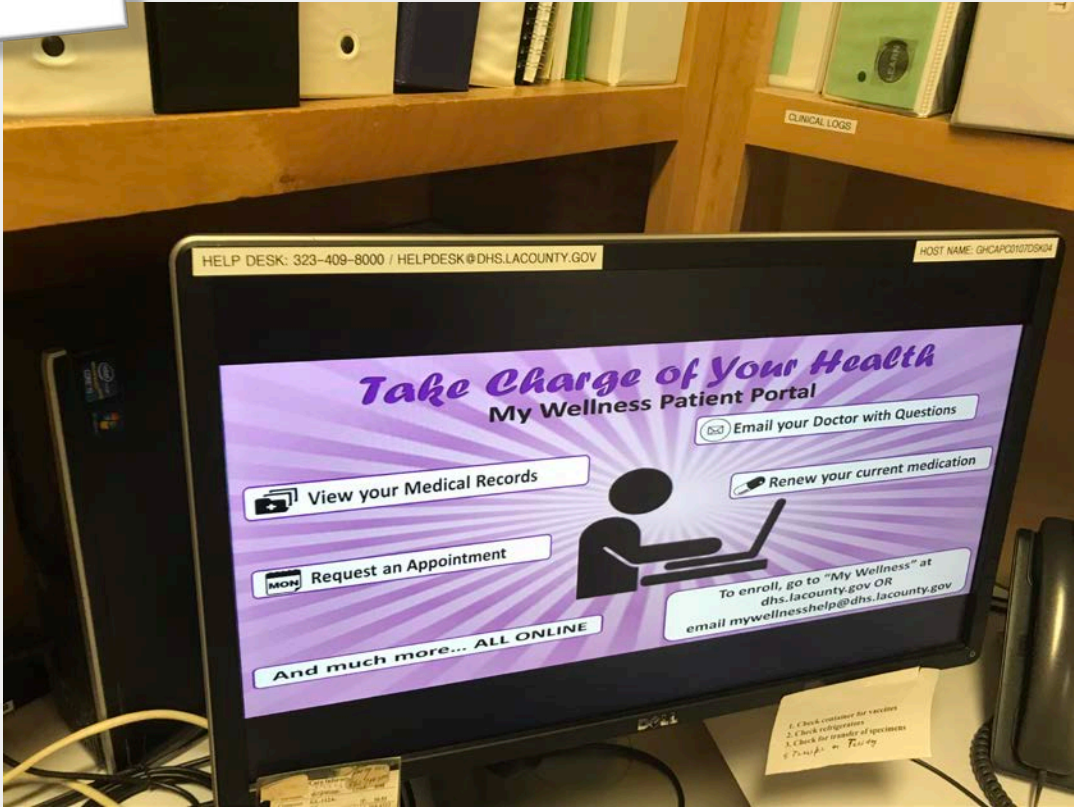
6.
Comprehensive Metrics

La Clinica de La Raza

Kevin Baxter
Director of Meaningful Use
La Clinica de La Raza

To impact any change in enrollment numbers, regular reporting to the clinics is necessary.

Percentage of Patients Reporting that Patient Portal Saved a Call or Visit to Clinic
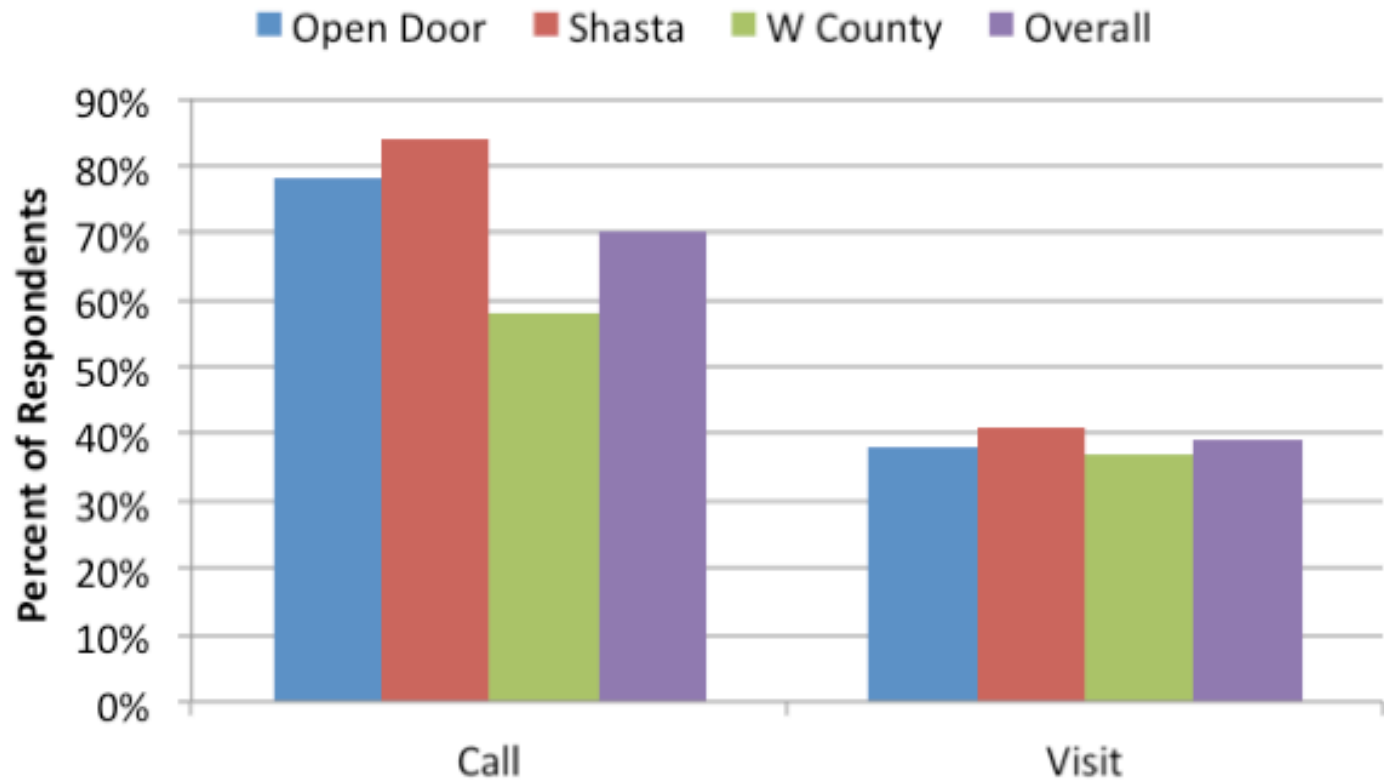
Are there examples of how much the patient portal saved unnecessary visits?

Best Practices
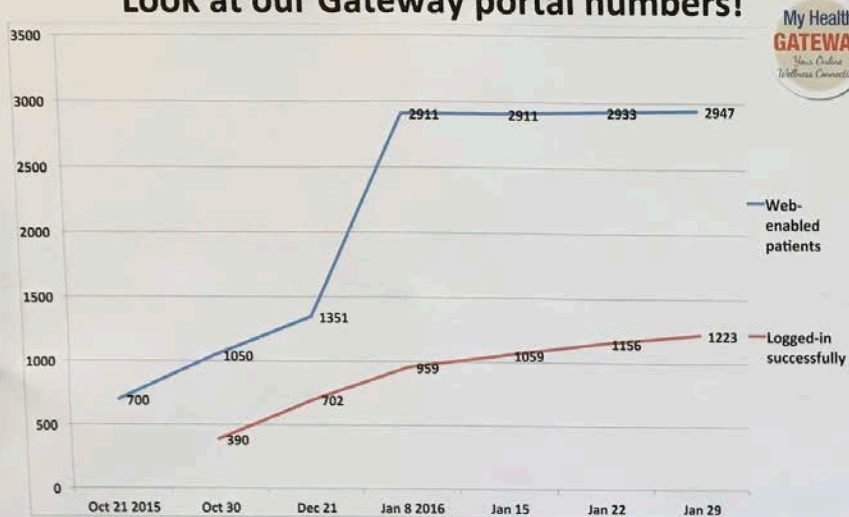
Simple
—
Tape
On
Wall

Mix
of
Measures

UMMA COMMUNITY CLINIC
Healthcare for all, inspired by Islam

Efficiency Measures

Timely response to p...   Number of unique pa...
Total number of lab, appointment, referral, and/or pr...
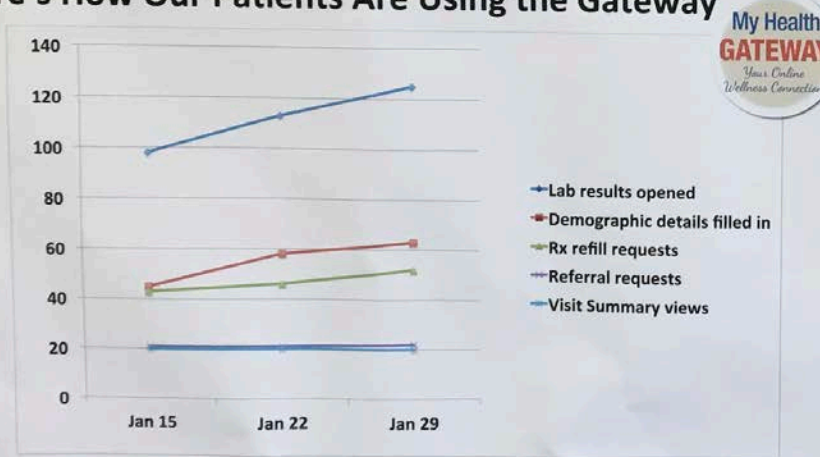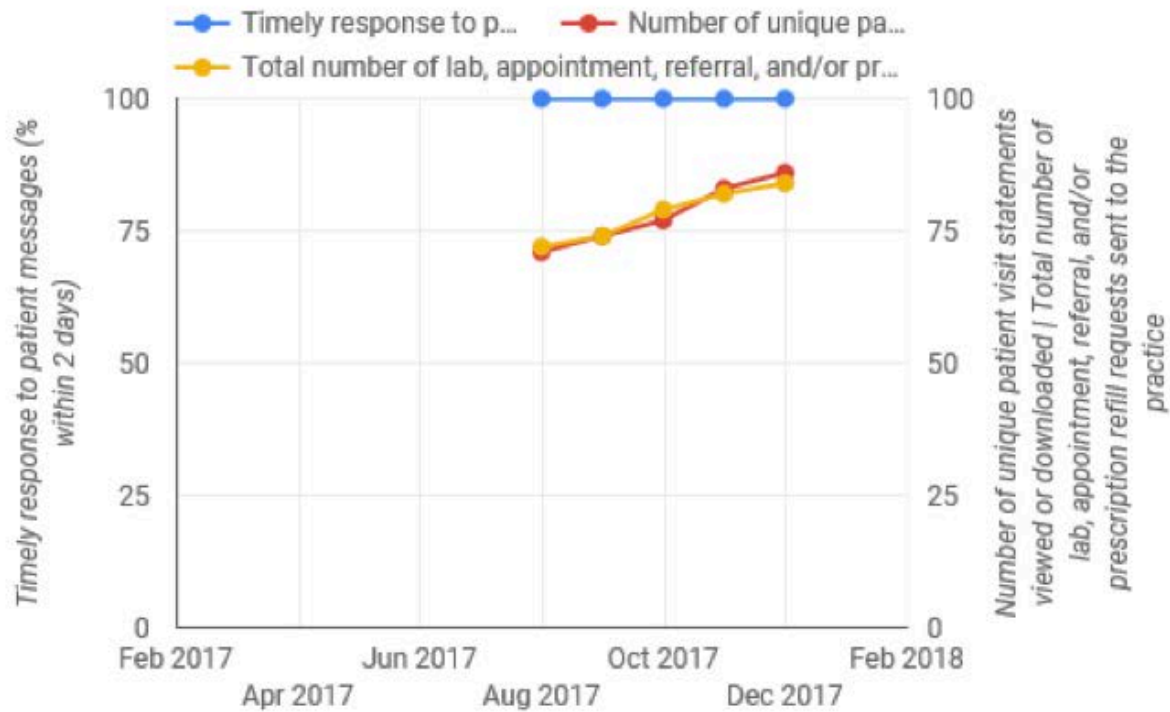
Participation By Site

Portal Participation by Site
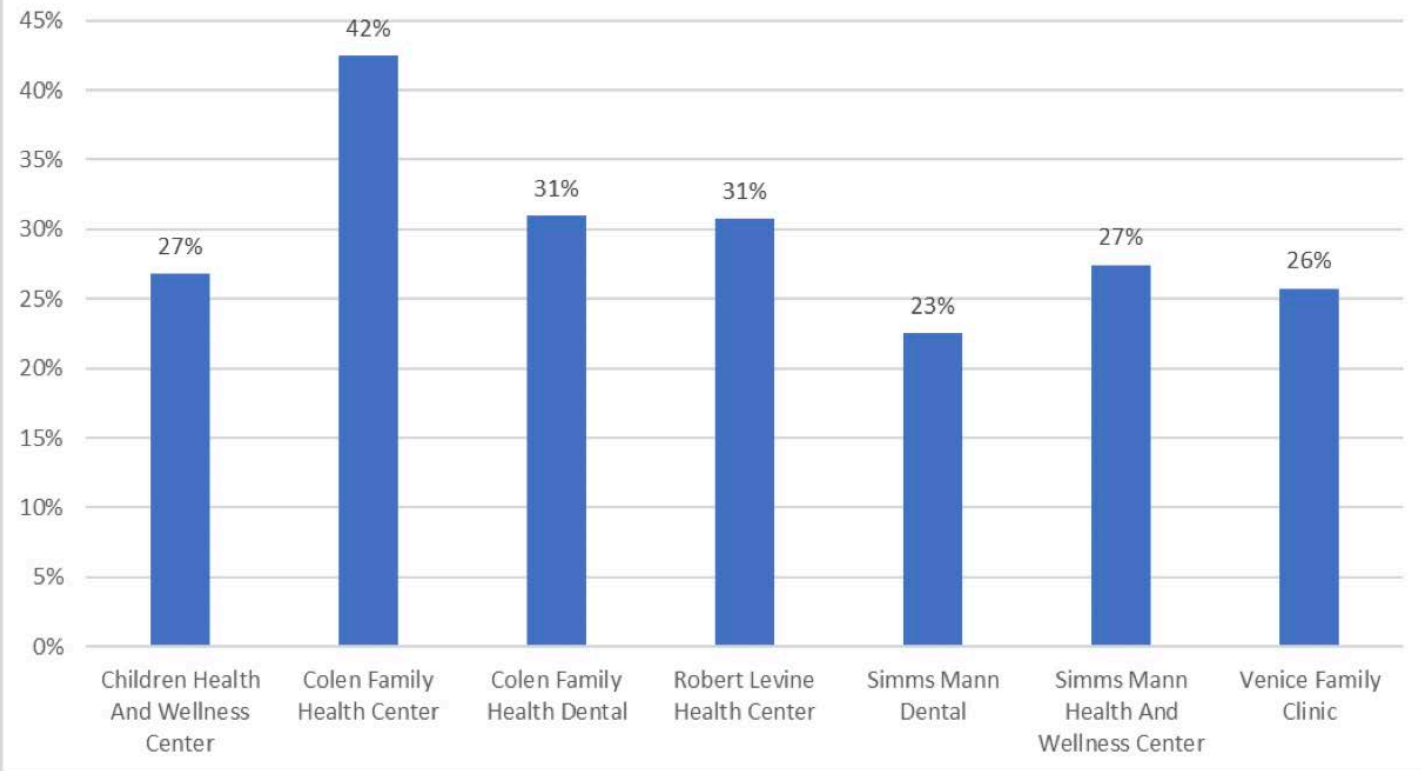
Site	Participation
Children Health And Wellness Center	27%
Colen Family Health Center	42%
Colen Family Health Dental	31%
Robert Levine Health Center	31%
Simms Mann Dental	23%
Simms Mann Health And Wellness Center	27%
Venice Family Clinic	26%
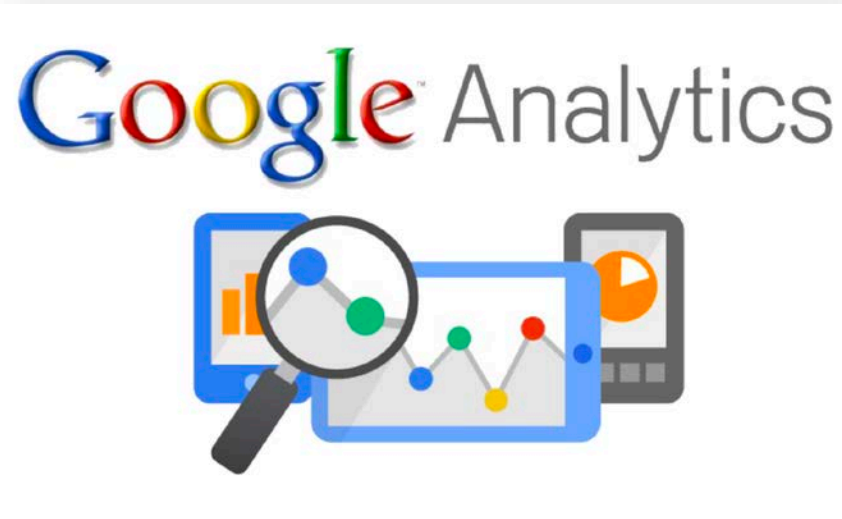
Comprehensive Metrics
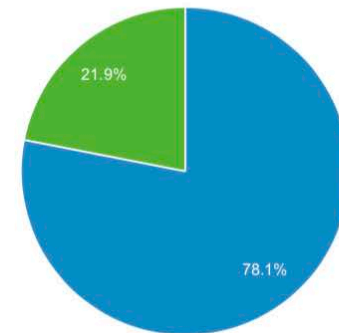
How Users Access The Portal

What are your top devices?

Sessions by device
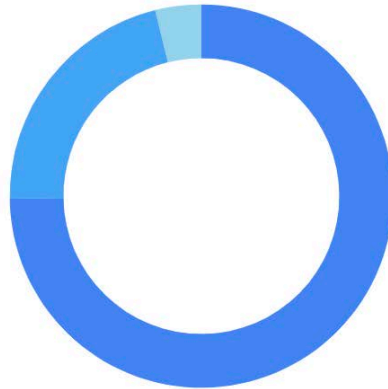
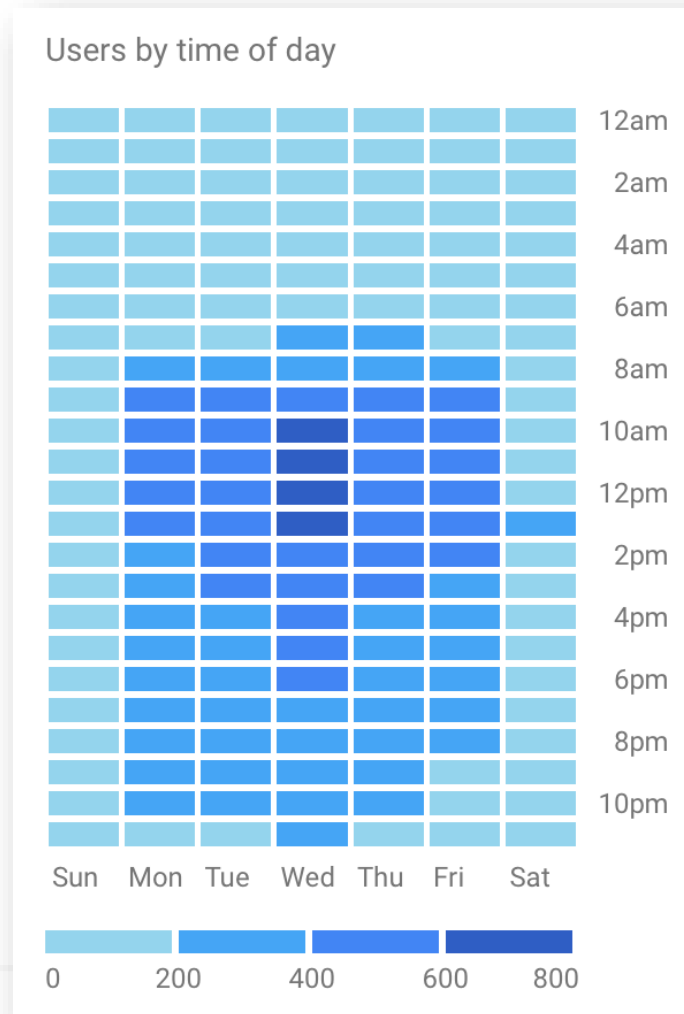| Mobile	Desktop	Tablet
74.8%	21.3%	3.9%
↓0.5%	↓0.2%	↑0.7%

Last 7 days ▾   MOBILE OVERVIEW ❯

When Is The Portal Used?

✓ 1.8 M+ Total Page Views in 2018
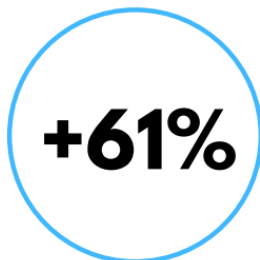
+61%
Views In
Lab Results
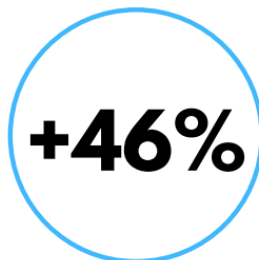
+46%
Views in
Health Records
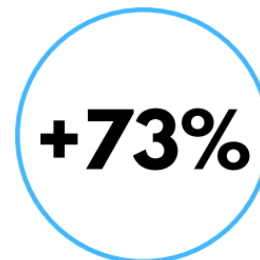
+73%
Views in
Appointments

✓ Quadrupled the number of patients
reading their provider's notes online

Outreach

West County
Health Centers

Caring for our Communities

Referral Request

Family History
Mother

Diabetes

Family History

Mother

Diabetes

Father

Cancer

...ternal Grand Father

...ns/concerns for next office visit   Past Medical

Please complete your health questionnaire to the

Past Medical History

eClinica
Schedule.

appendectomy

Questions/Concerns
Ask Doctor
Messages
Inbox
Sent Messages
Deleted Messages
Account Information
Personal Information
Additional Information
Intake Forms
Questions/concerns for next office visit
Past Medical History
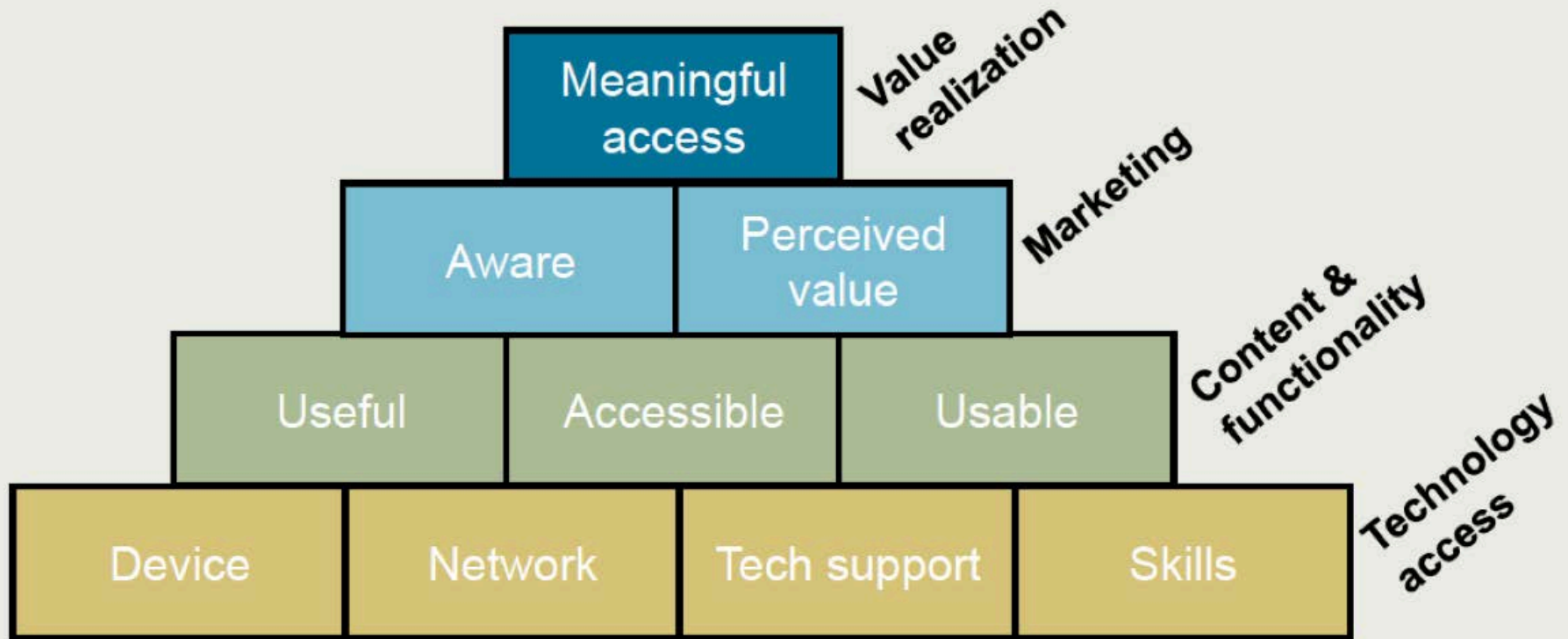Surgical and Allergies

Past

appendectomy

99

Secure Messaging

- Maintaining contact with our patients from our High School clinic while they were on Summer Break

Decision Points

Meaningful Patient Engagement

Kaiser Presentation on Disparities in eHealth, 10/26/11, Tim Kieschnick

Decide

Wait	Start Portal Enrollment Increase Project
• Unsure of board/senior leader support versus other projects • Unknown EHR vendor options • Looking at other secure communications platforms - texting? • Other?	• EHR vendor options are useful • Known specific patient engagement use • Known incentive payment enhancement • Want secure communications platform • Board/Senior leader optimism and support for project and team

Final Discussion Question

What is <u>one new thing you learned today</u> to:

improve use of the patient portal to <u>reduce care gaps</u>/<u>improve patient outreach</u>?

Q&A

Jim Meyers, DrPH

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