SNI Workshop: Improving Patient Inreach and Outreach

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

Jim Meyers, DrPH

Safety Net Patient Portal SME Consultant and Senior Leader Coach jimmeyersdrph@gmail.com

Welcome!

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- Meet Each Other
- Hear Survey Results

- Learn What is Trending
 - Learn Innovations That are Working in the Safety Net

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

• Q&A



- Introduce Ourselves
 - 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

Introduce Yourself

Name Position in Organization

Answer One Question

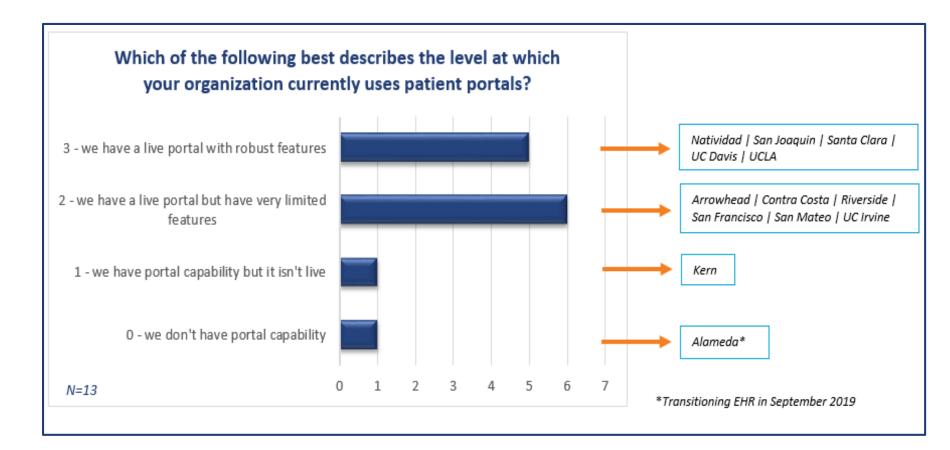
What would be the one most wanted portal function if you asked your providers? (1-5 words only)

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 uses and features are currently live on the portal?

Access and review lab results Access and review immunizations Access and review allergies Update contact information Access and review medications Secure messaging/e-mail Request prescription refills View educational materials Schedule non-urgent appointments Download and complete forms Push notifications Make payments n/a 2 4 6 10 12 8 n N=111

*Note: "n/a" indicates systems without a live portal 🖷

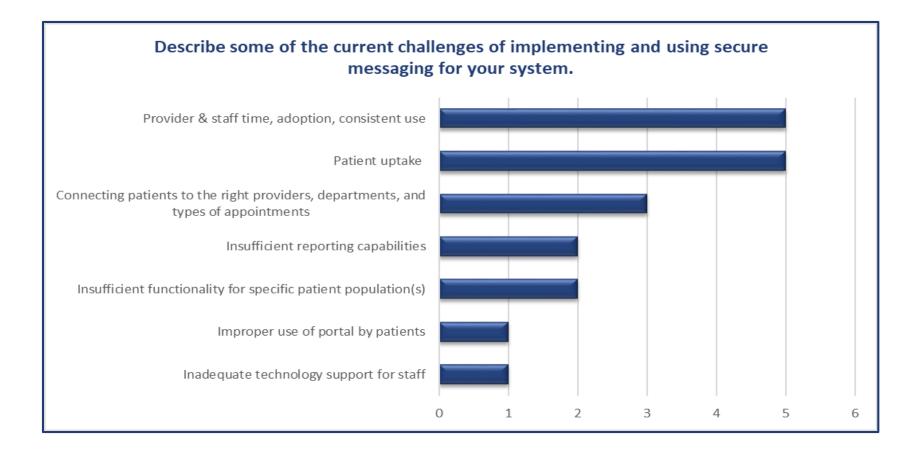
What Portal Features Are Others Using?

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?

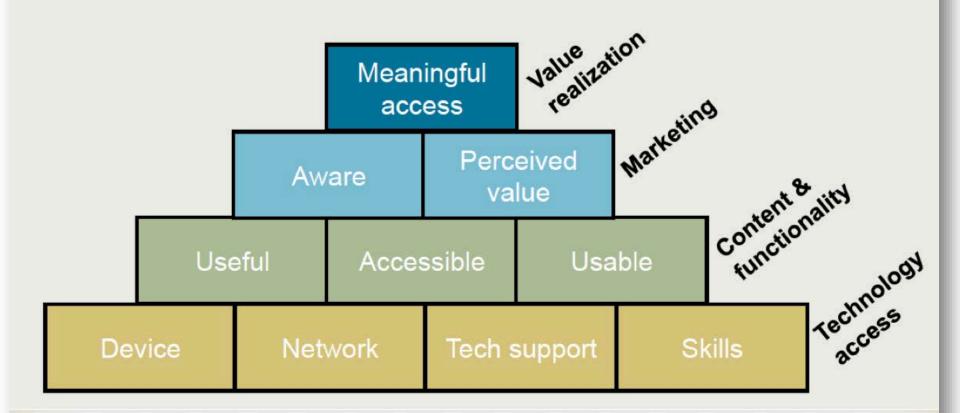


Successful Patient Portal Innovations

Trends in Portal Operations That Are Useful to Know



Meaningful Patient Engagement



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

National Trends

Information Sharing

- Care Records
- Bi-directional Communications
- MU \$

Marketing

 Strategic differentiator

] Future

- Secure
 Communication
- Inreach and Outreach Options

Drivers

Benefits

Patients:

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

Clinics/Providers:

- Administrative efficiencies (less calls)
- Push routine tasks to care team
- More time for critical patients

D Patients:

- "Digital Divide"
- Literacy
- Language
- Privacy concerns

Providers:

- Potential for added work
- Lack of reimbursement
- Inappropriate use by patients
- Liability for security breaches

Barriers

National Trends

What do we knov portals? a systen

Terese Otte-Trojel¹, Antoinette o

t developing patient terature review omas G Rundall², Joris van de Klundert¹

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

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Otte-Trojel T, et al. J Am Med Inform Assoc 2016;23:e162-e168. doi:10.1093/jamia/ocv114, Reviews

ZUCKERBERG SAN FRANCISCO GENERAL Hospital and Trauma Center

UCCE

Interest is not the barrier

 70% of patients in the SF safety net interested in ecommunication w/ providers:

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

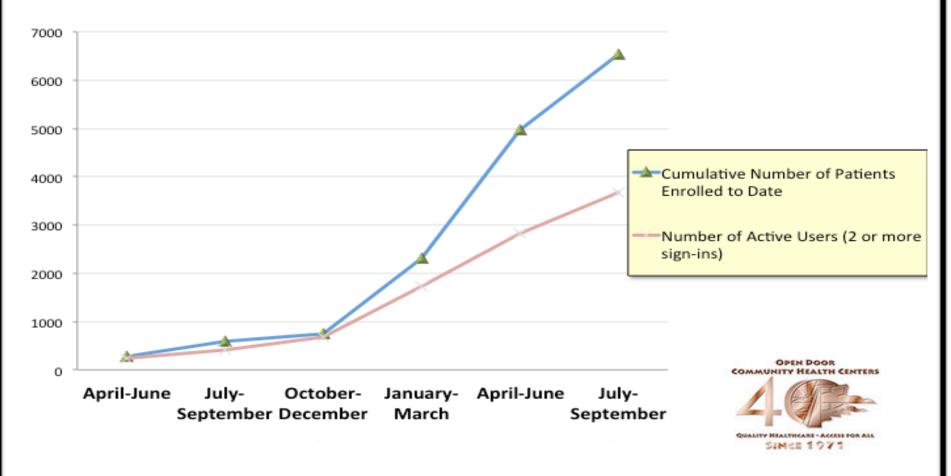
There is interest!

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"





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 want to use it?





Senior Leader "Bump"



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DHS Specialty Cara Forum: Hearing from the Front Line

By S. Mantes Sout, MD The Department of Health Save Instative leasted a Specialty Care Reserve

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(See TOHIN' as page 2)



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?

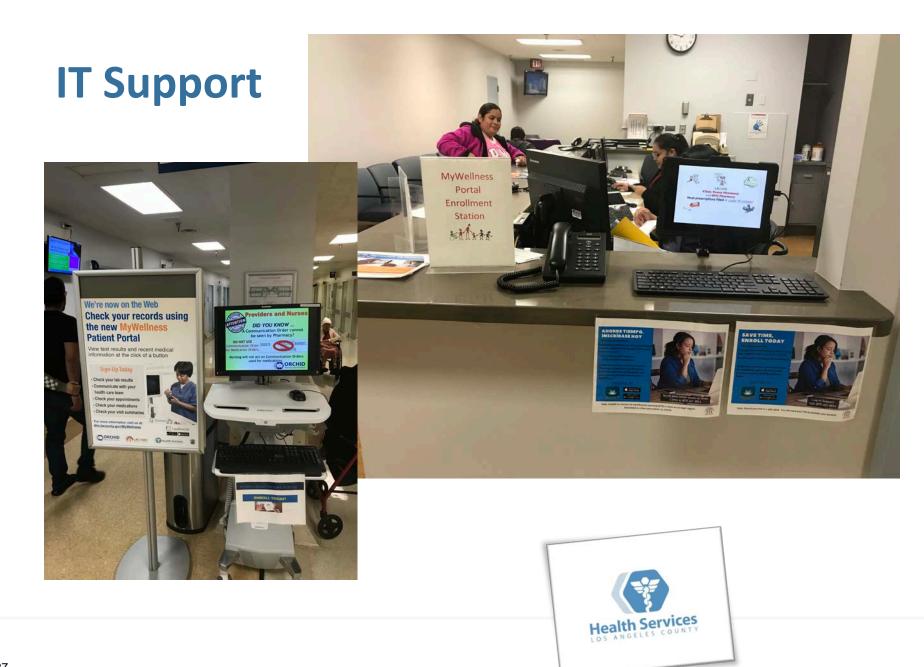
Listen to the Patient - Focus Groups

- 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



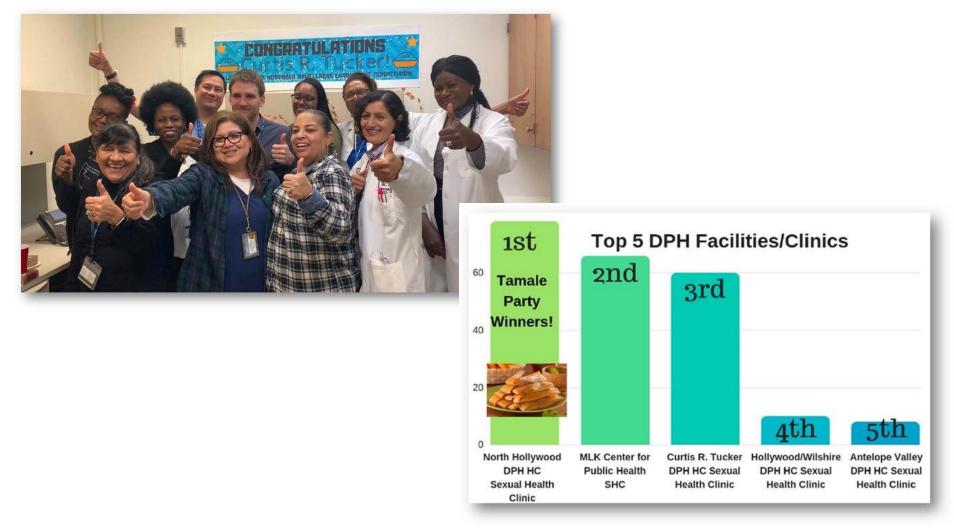
Targeted Marketing



Friendly and Effective Competition



DPH Engagement



Training – Led By Innovative Champion

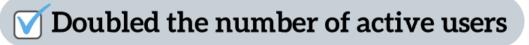
Primary Care Workgroup Subcommittee on MyWellness

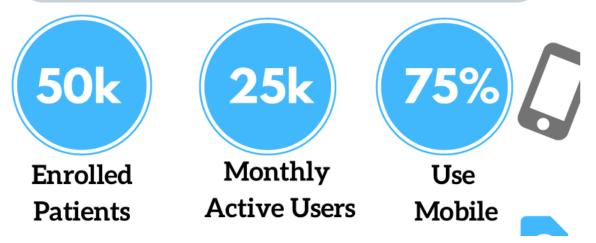
Barbara Rubino (LAC+USC), Jen Chen (Mid-Valley), Shari Doi (PAC)



Enrollment and Active Use

WHAT WE'VE ACCOMPLISHED







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

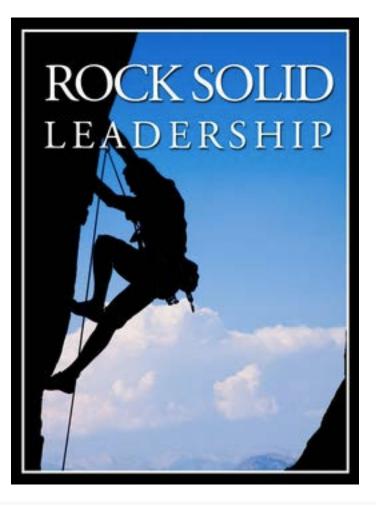
Six Keys to Portal Redeployment Success

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



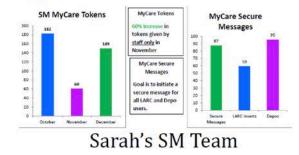
 We are improving access to care through easy to use technology by streamlining workflow, increasing patient engagement, and improving patient/provider communication.





3 Key initiatives for successful implementation

- Strategic Workshop
- MyCare Portal Re-Launch
- Monthly Dashboards







Planned Parenthood California Central Coast

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





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

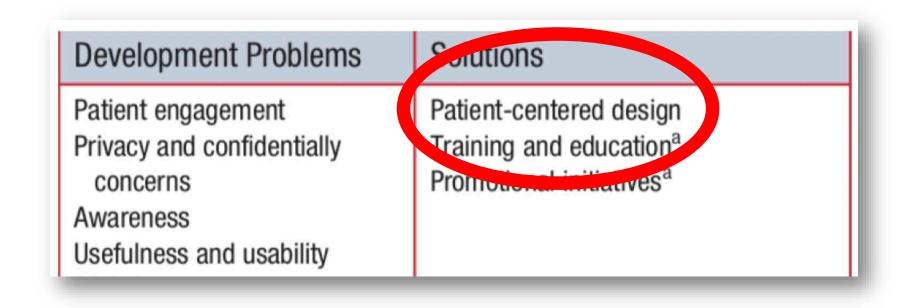


Keep pushing for the goals, even when there are setbacks because the result of hard work and commitment is worth it to the Team and to your staff.

2. Focus on What Really Drives Use



User Friendly and Useful!



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

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Patient Surveys

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730 port access to the Intern

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report being interested in entry of in MyWellness

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?



3. Focus The Marketing

Dedicated and Responsive Marketing Support





Dedicated Marketing Name for Portal



Check your records online using the new MyWellness Patient PortallRevise su expediente en línea con el/uevo Portal de paciente MyWellness

Ask your

DHC//County.gov/h

Medications Medicamentos healthcare team toda Lab results/Resultados de laboratorio Pida hoy su equipo de Message your care team/Mensaje de atención médica su equipo de salud Request appointments/Solicitar una cita Request medication renewals/Solicitar renovación de Update your contact information/Actualizar su información de

contacto

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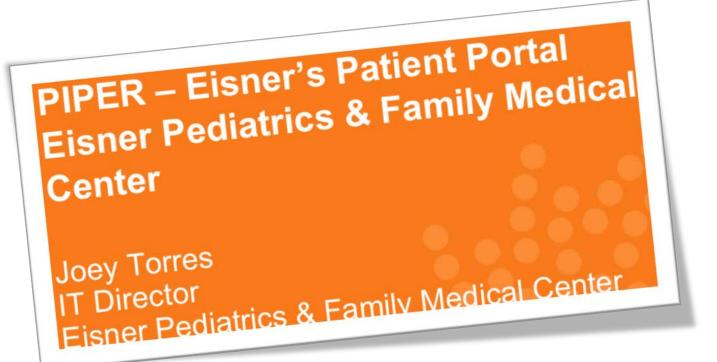


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2018-2019

MEDICATION





Piper!



Foothill Community Health Center (FCHC HEALTH CONNECT



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

musicessain boming 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



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

iInscribase hoy!

Para más información pregunte en Recepción o visite la pagina web: https://health.healow.com/foothillclinic









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 Care Team Members:

My Portal User Name:

For more information or to get

help with your account, call:

(818) 979-7444

or your NEVHC Health Center Business Office.

www.nevhc.org

Password Clue:

Rev. 05/17

My Provider:

NEVHC PATIENT PORTAL

NECTED!



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

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New Brochure

Foothill Community Health Center (FCHC HEALTH CONNECT

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4. Staff

Engagement

Venice Family Clinic 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

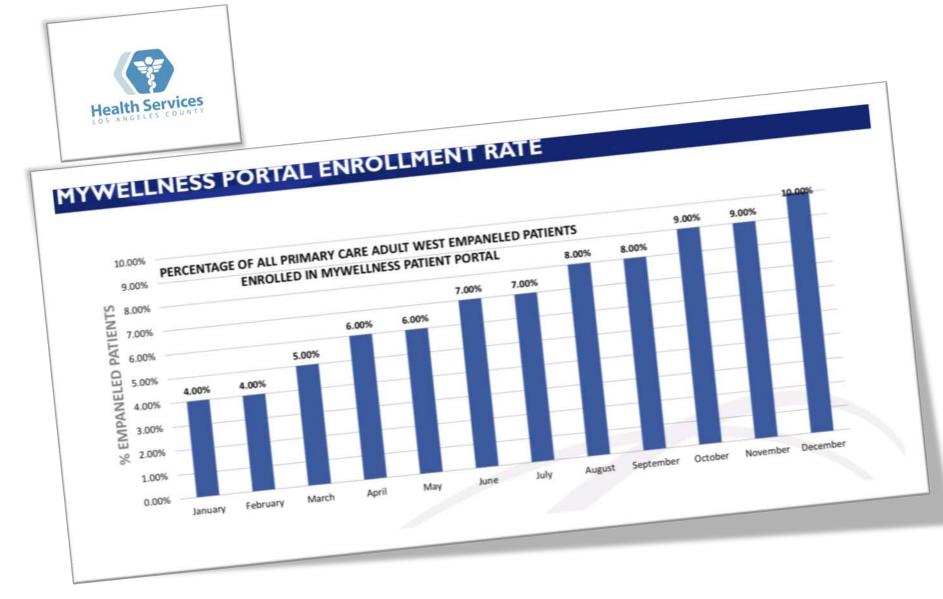


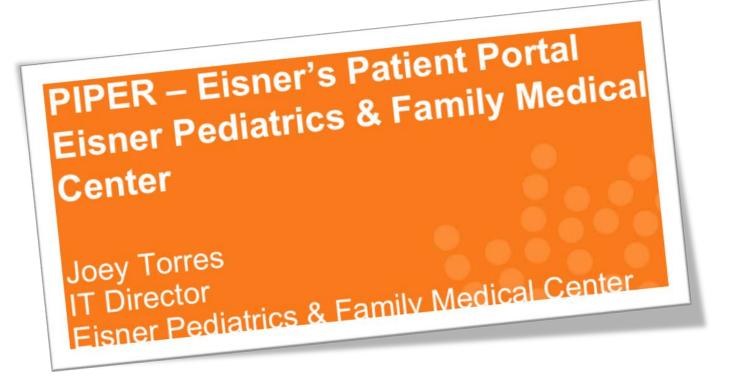
- The biggest impact we've seen from this solution:
- Focus on the "low hanging fruit", determine what the practice does most consistently and apply portal technology to assist in existing workflows.
- Get a provider onboard early, having our CMO onboard with Patient Portal yielded increased utilization quickly.
- "Quick Vids", record basic portal function workflows and make those recordings available to staff utilizing patient portal.



Innovative Clinical Champions







Starbucks Gift Card for staff member team with highest enrollment





LA DHS Enrollment Competition

Around DHS

MyWellness Patient Portal Enrollme

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 th 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).

npetition Kicks Off

Patien

DEPARTMENT-WIDE ENROLLMENT COMPETITION

Portal

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have wonderful family can

monicate 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



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?



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.

Ah-ha: Immunization Records in Transferable PDF Format



Challenges and Solutions

• Our biggest challenge in this last year:

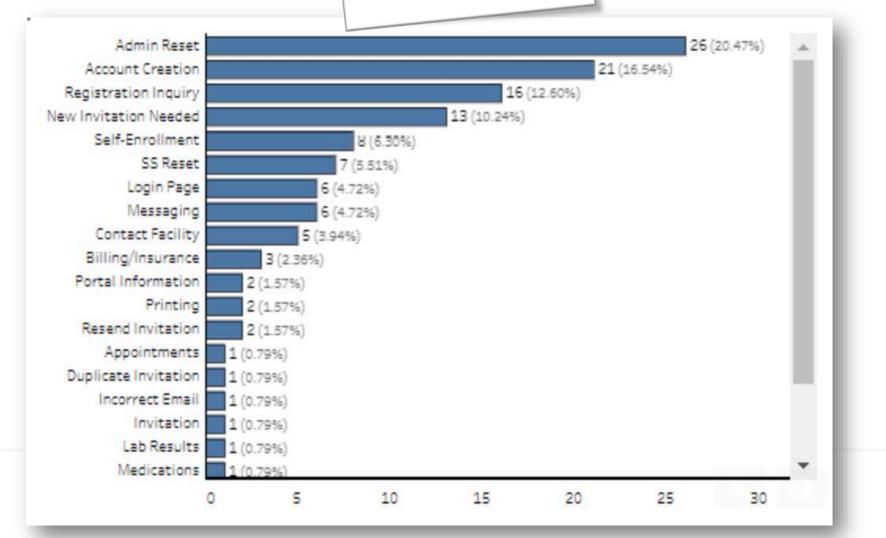
Texting Vs Patient Portal

- Portal is better positioned for clinical discussion regarding care.



Portal Help Desk Report

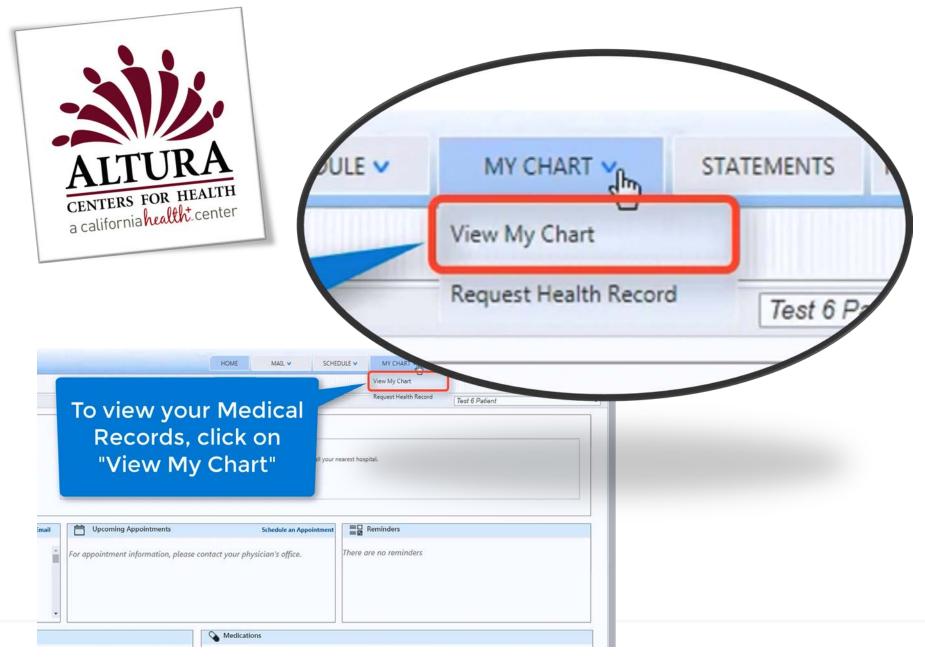


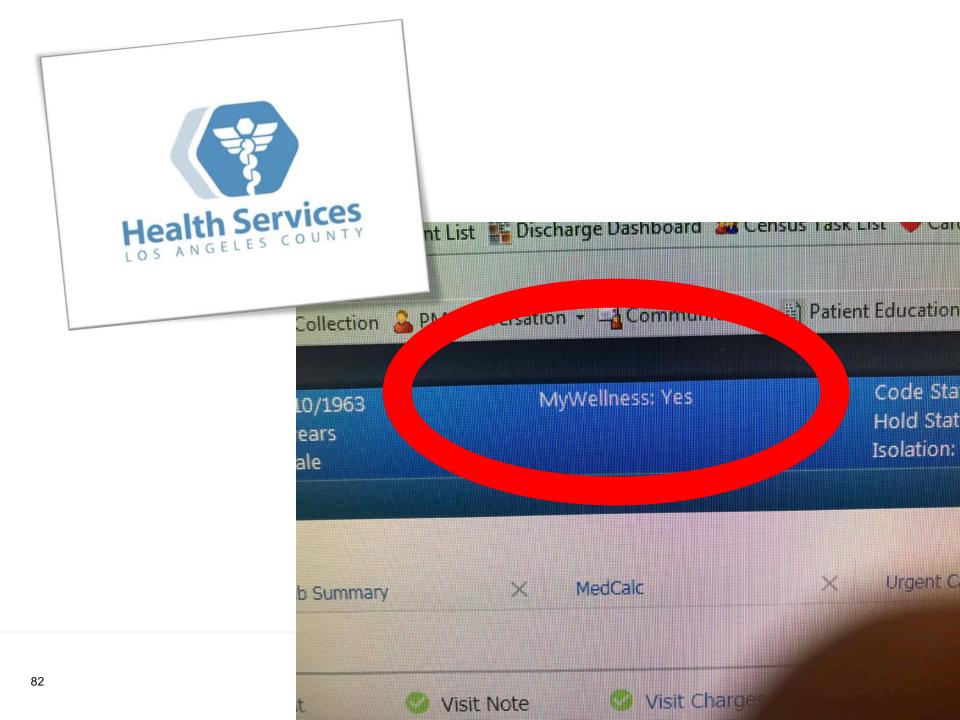




Customized Web Landing Page









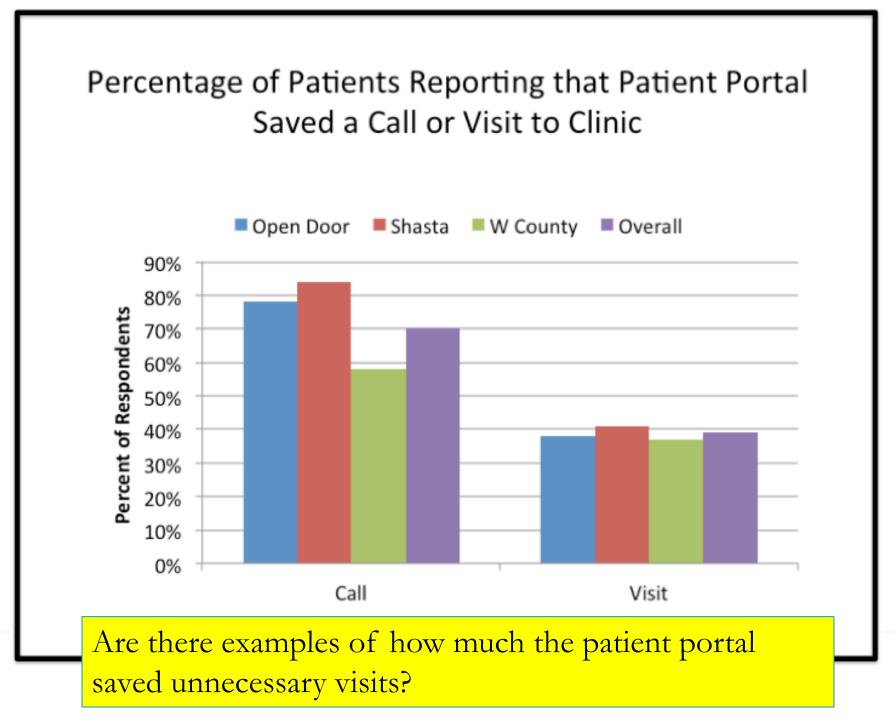




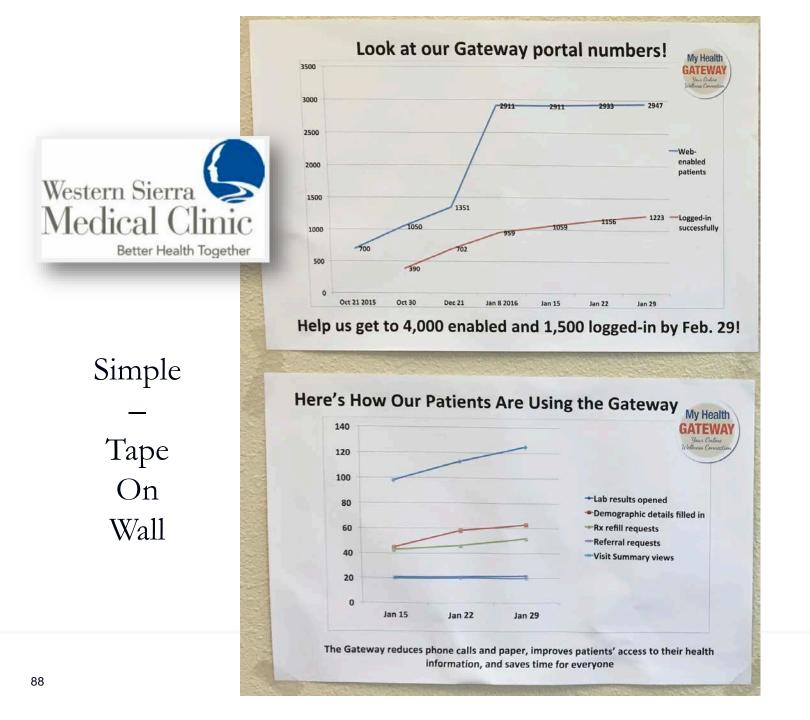
Comprehensive Metrics

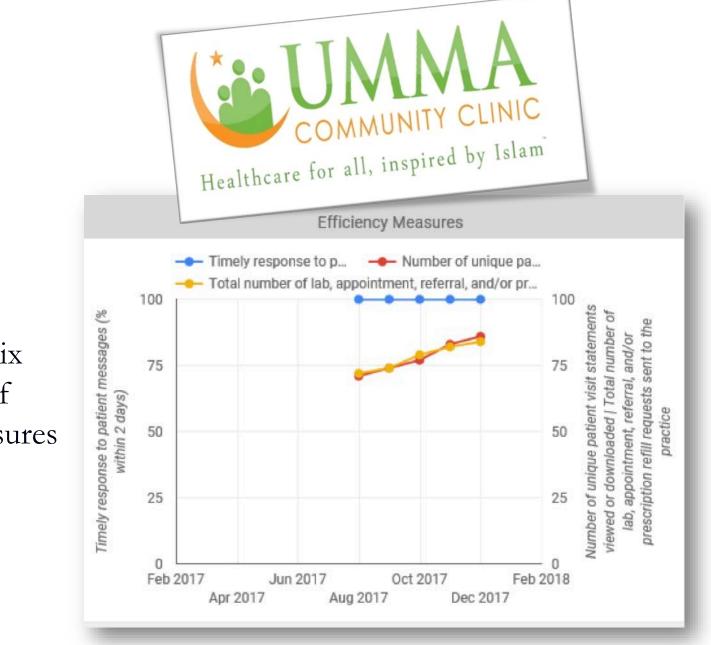


To impact any change in enrollment numbers, regular reporting to the clinics is necessary.

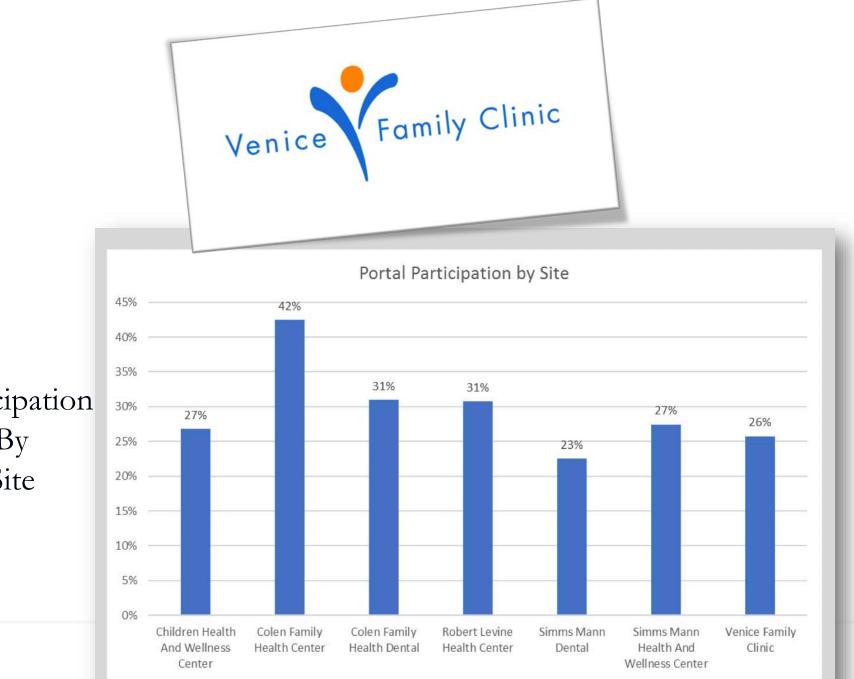








Mix of Measures



Participation By Site

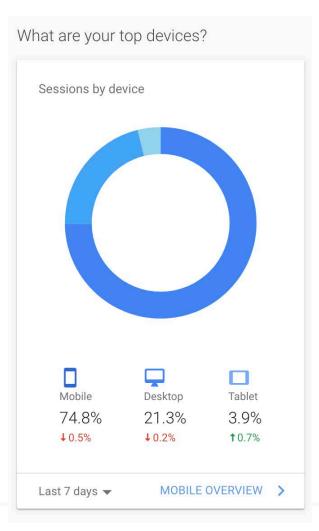




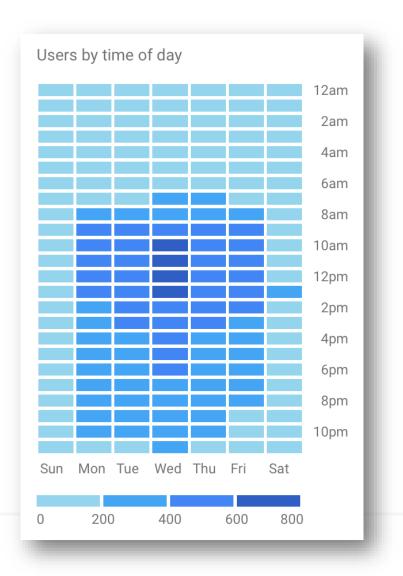
Comprehensive Metrics

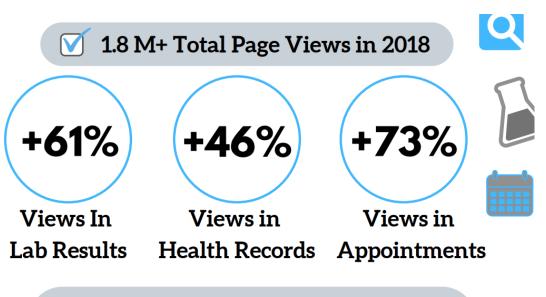


How Users Access The Portal



When Is The Portal Used?





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

Outreach

West County Health Centers Caring for our Communities	Referral Request
Cancer Iernal Grand Father Ins/concerns for next office visit Past Medicar. Please complete your health questionnaire to the	
Past Medical History Puestions/concerns Ask Doctor Ask Doctor Messages Count Information Personal Information Personal Information Additional Information Cuestions/concerns for	
Construction contrast to the set of the	





Secure Messaging

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



Decision Points

Decide

<u>Wait</u>

- Unsure of board/senior leader support versus other projects
- Unknown EHR vendor options
- Looking at other secure communications platforms - texting?
- Other?

Start Portal Enrollment Increase Project

 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</u> <u>today</u> to:

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



Jim Meyers, DrPH

Safety Net Patient Portal SME Consultant and Senior Leader Coach jimmeyersdrph@gmail.com