

Patient Portal Engagement During COVID

Wednesday, October 21, 2020
1-2pm

[Recording Link](#)

Agenda

Time	Topic	Lead(s)
5 min	Welcome and Logistics	Amanda Clarke
45 min	Patient Portal Engagement during COVID <i>*Participant Polls and Discussion Throughout</i>	Jim Meyers, DrPH
5 min	Final Questions	All
5 min	Wrap-up & Announcements <ul style="list-style-type: none">• Upcoming Events• Post Event Survey	Amanda

Logistics



Please use the chat box to ask questions



Webinar will be recorded and saved on [SNI Link/Telehealth](#)



Please complete our pop-up survey

Introductions



Jim Meyers, DrPH

Safety Net Patient Portal

SME Consultant and Senior Leader Coach

jimmeyersdrph@gmail.com



Patient Portal Resurgence during COVID: Ideas for Maximizing Portal Engagement

Jim Meyers, DrPH, MHA

Safety Net Patient Portal

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Outline

- Resource Link Sharing
- Environment
- Idea Sharing
 - Refocus Your Strategic View of the Portal
 - Engaging Providers – Staff - Patients
 - Build a Strategic Governance Structure
- What You Can Do Right Now
- Creating The Future You Want

Resource Link in Chat Box



Look for this symbol on slides to know a resource is being shared on the topic.

SNC CALIFORNIA HEALTH CARE SAFETY NET INSTITUTE

Outreach Implementation: Playbook of Resources
Updated August 23, 2019

MOVING THE NEEDLE ON ACTIVE PATIENT PORTAL USE

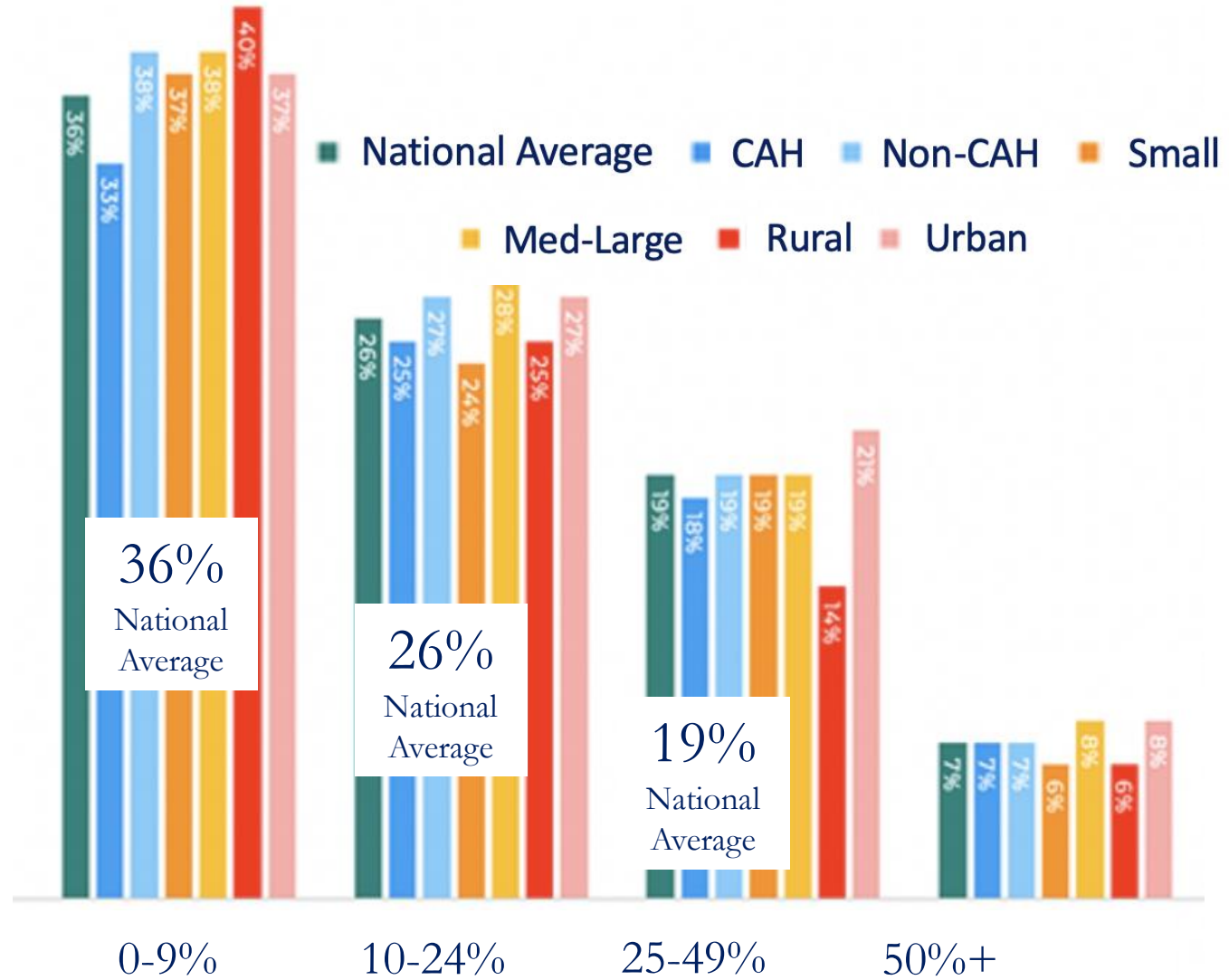
- All documents courtesy Jim Meyers, DrPH jimmeyrsdrph@gmail.com
- Link: [August 15, 2019 Workshop session slides](#)

I. EXECUTIVE & PROJECT SUPPORT

- **Patient Portal Deployment for Clinic Executive Leadership** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of the executive sponsor on a patient portal development team, including oversight, setting priorities, and evaluating progressing
- **Patient Portal Deployment for HIT Staff** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of Health Information Technology staff on a patient portal development team, including establishing role clarity, project management, and implementation preparation
- **Patient Portal Deployment for Portal Team Members** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of the portal team in the development and deployment of a patient portal, including selecting a multidisciplinary team, developing a work plan, and tracking progress
- **Patient Portal Deployment for Provider Champions** (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of provider champions in the engaging providers in portal deployment
- **Patient Portal Deployment Portal Team One-Year Work Plan** (Jim Meyers, DrPH) Sample work plan to launch a patient portal in a one-year timeframe, including 16 elements and associated tasks from setting vision, training staff, preparing for mobile features, to providing non-English functionality, and more
- **Patient Portal Deployment Project Management Plan** (Metro Community Provider Network) Sample project management plan including task name, duration, start and finish date, and status tracking
- **Patient Portals in the Safety Net: Patient Portal Planning (1 of 3)** (California Health Care Foundation) The first in a series of papers that documents the experiences, lessons learned, and tools used by three California community health centers from establishing the vision, assessing barriers, incorporating patient voice, launching portal planning team, and more
- **Patient Portals in the Safety Net: Implementation (2 of 3)** (California Health Care Foundation). The second in a series of papers sharing how California health systems tailored portals to their own

Environment

Low Enrollment – Low Use



Patient Portal Enrollees

Safety Net User Profiles

Varies by Demographic, Care Setting and Geography

1/3



One-Timers

1/3



Episodic

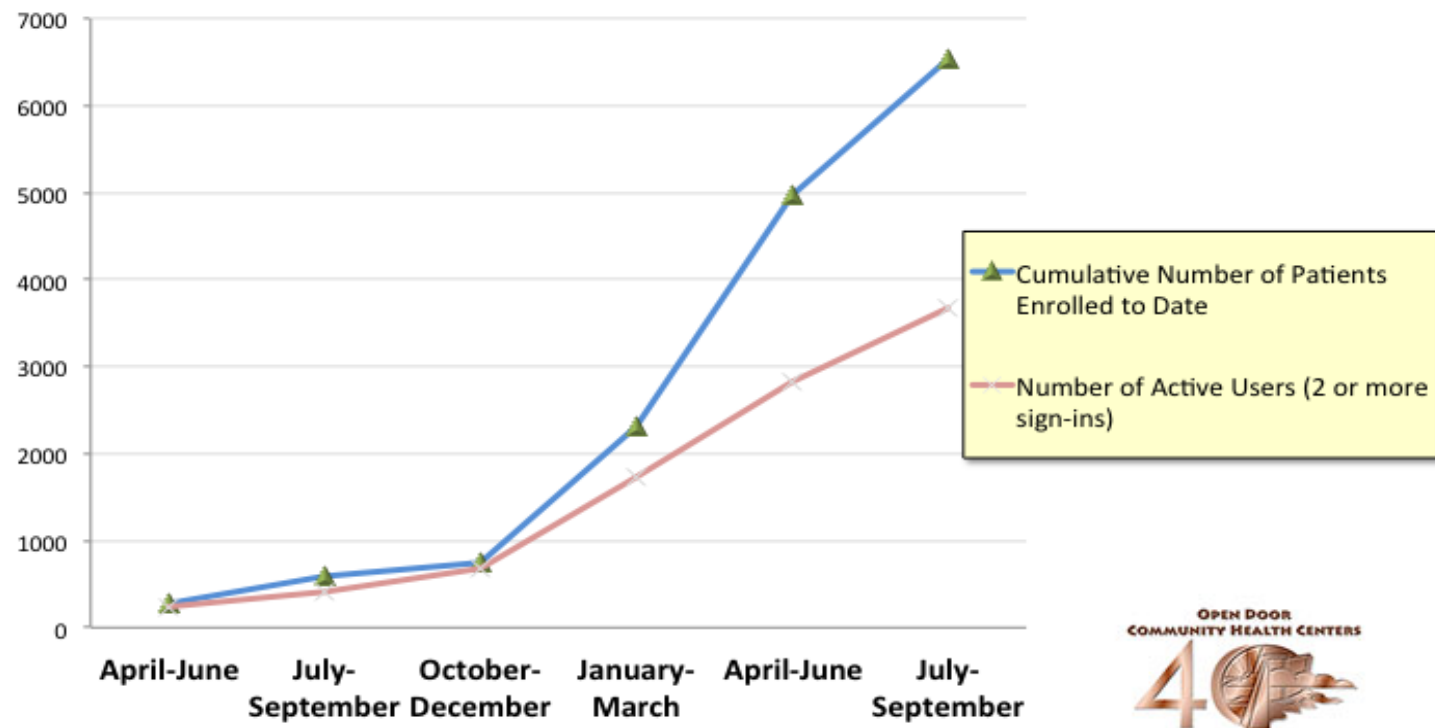
1/3



Medical Home

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Portal Enrollment and Active Use



Idea Sharing

See Playbook



1. Refocus Your Strategic View of the Portal

See Playbook



2. Engaging Your Providers – Staff – Patients

3. Building a Strategic Governance Structure

- *Quotes from the Field*
- Questions for the Group
- Best Practices and Resource Sharing
- Q&A

Refocus Your Strategic View of the Patient Portal

Survey

Since the start of your Patient Portal, how many times have you done a unique organization-wide “enrollment push”?

- Zero
- Once
- Twice
- Three or more times



LA DHS Patient Portal Redeployment:

An Example of Refocus Success



“Refocus” Approach

- 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



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*

Enrollment and Active Use Change Mid-2018 To Mid-2019

WHAT WE'VE ACCOMPLISHED

Doubled the number of active users



Enrolled
Patients



Monthly
Active Users



Use
Mobile



Enrollment and Active Use Today

WHAT WE'VE ACCOMPLISHED

Doubled the number of active users



Enrolled
Patients

Now
90k



Monthly
Active Users

Now
36k



Use
Mobile



Strategic Refocus Steps

Top Reason For Disruption - Process: “we committed uncountable.”

created a port to regular meetings





3-Minute Video in Playbook + Leader Guides

Senior Leadership Bump

Strategic Refocus Steps



Portal Redeployment Success: “we created a portal redeployment action team, committed to regular meetings and held each other accountable.”





Strategic Refocus Steps



Surveys and Workplan Template in Playbook

Senior Leadership Bump

Quick Environmental Scan

Top Reason For Portal Redeployment Success: "We created a project team, committed to regular meetings and held each other accountable"





Strategic Refocus Steps

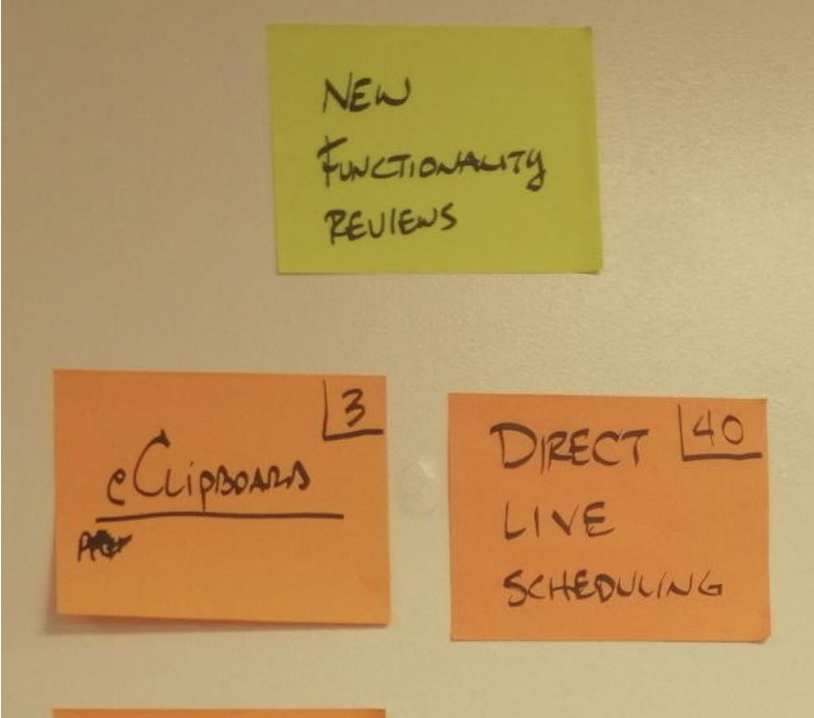


PM Tracking Tools in Playbook

Senior Leadership Bump

Quick Environmental Scan

C-Suite and Team Prioritization Summit





Strategic Refocus Steps



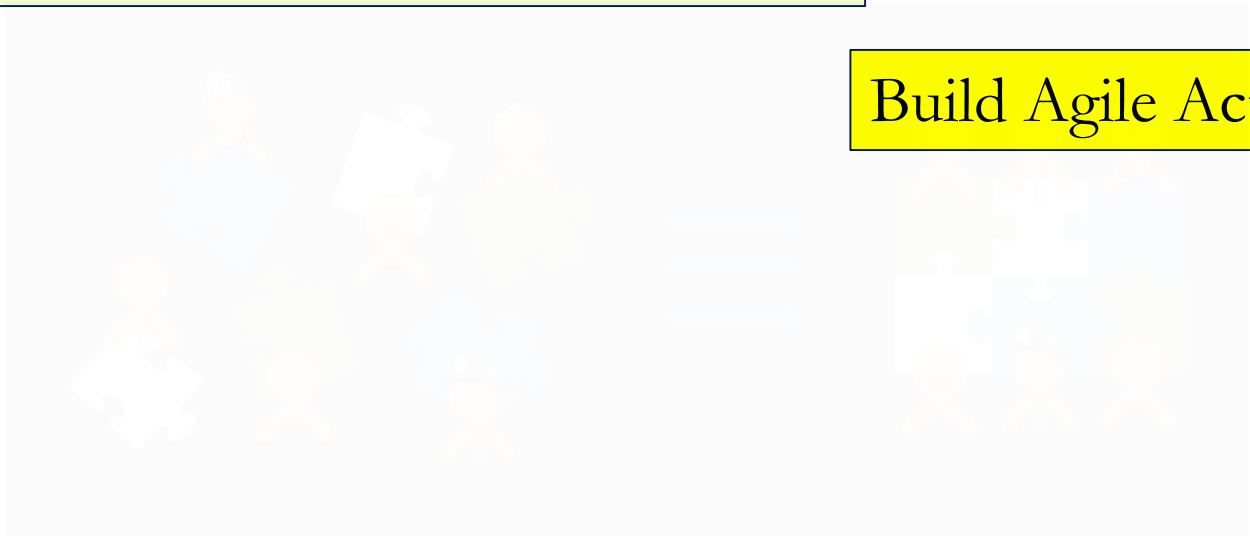
Team Guide in Playbook

Senior Leadership Bump

Quick Environmental Scan

C-Suite and Team Prioritization Summit

Build Agile Action Team



Quote From The Field

Top Reason For Portal Redeployment Success: “we re-envisioned our patient portal - we created a portal redeployment action team, committed to regular meetings and held each other accountable.”



**Planned Parenthood California
Central Coast**



Strategic Refocus Steps



Metrics
Charts,
Measures,
Guides in
Playbook

Senior Leadership Bump

Quick Environmental Scan

C-Suite and Team Prioritization Summit

Build Agile Action Team

Collect Data - Metrics – Build Just-in-Time Knowledge – Adjust Plan



Strategic Refocus Steps



PM Tracking Guides and Dashboards in Playbook

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Build Agile Action Team

Collect Data – Metrics - Build Just-in-Time Knowledge – Adjust Plan

PDCA – Market it - Adjust it - Go

Engage Your
Providers -
Staff -
Patients



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

Ask Your
Providers!

Survey

What would be the most wanted portal functions if you asked your providers – to best engage their patients – to best save time for everyone? Select up to three.

- View Allergies
- View Labs
- Download and Complete Forms
- Review Meds
- View Educational Materials
- View/Schedule Appointment
- View Immunizations
- Secure Message/e-mail
- Request Refill
- Connect with Video Visit

Results from a Pre-COVID Patient Portal Use Study

View Allergies 83%

View/Schedule Appointment 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%

View Educational Materials 58%

Connect with Provider Video Visit

Request Refill 58%

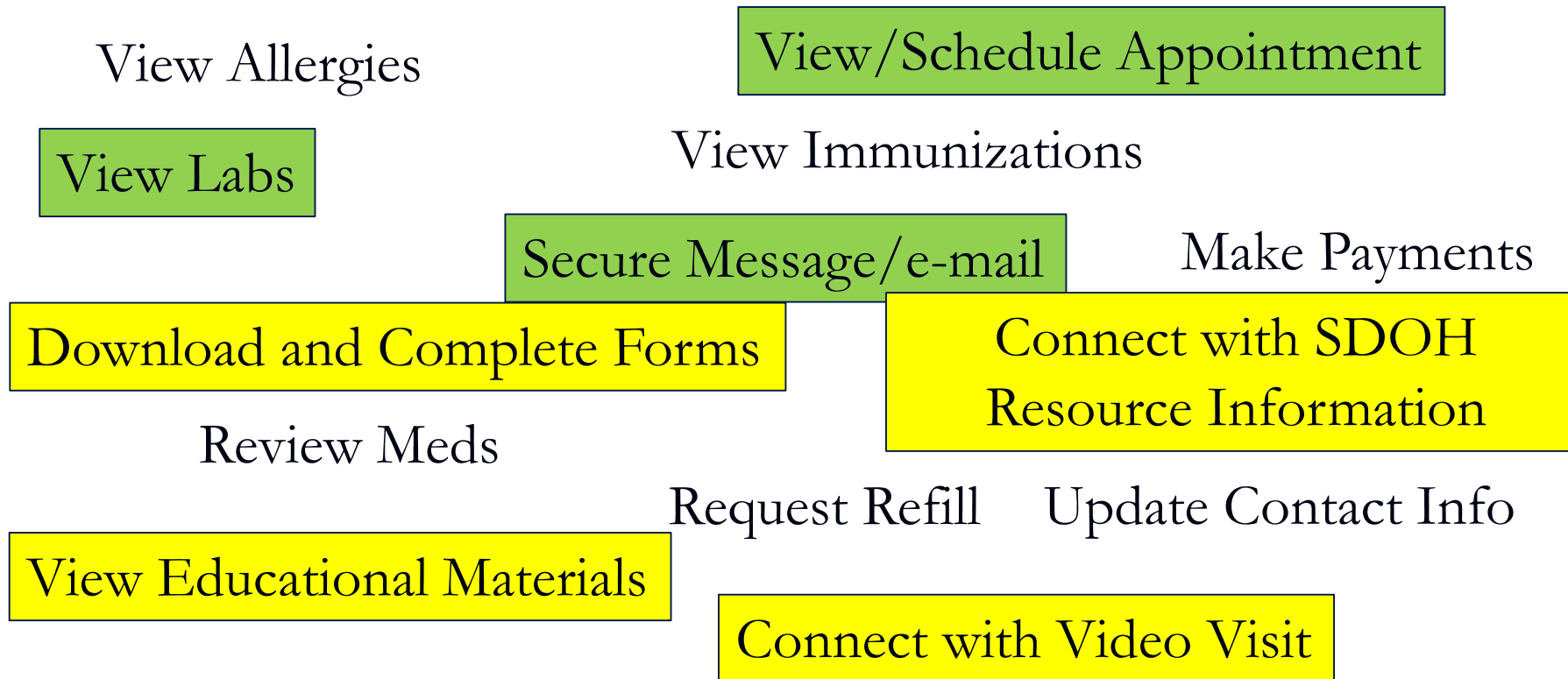
COVID-Period Interviews Results

- View Allergies
- View Labs
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Just Over The Horizon?



Quote From The Field

“Encourage feedback from clinical staff about ways to optimize and improve the patient portal tool and follow up on their suggestions. For example, dermatology clinics would like an easy way for patients to upload photos, since that’s important for skin care concerns”



Anshu Abhat, MD
Internist and Patient Portal Team Leader
Los Angeles Department of Health Services

Ask Your
Patients!



Quote From The Field

I love the patient portal! I can go on the portal after my kids are in bed and make an appointment.

Member, Patient Advisory Council
West County Health Centers



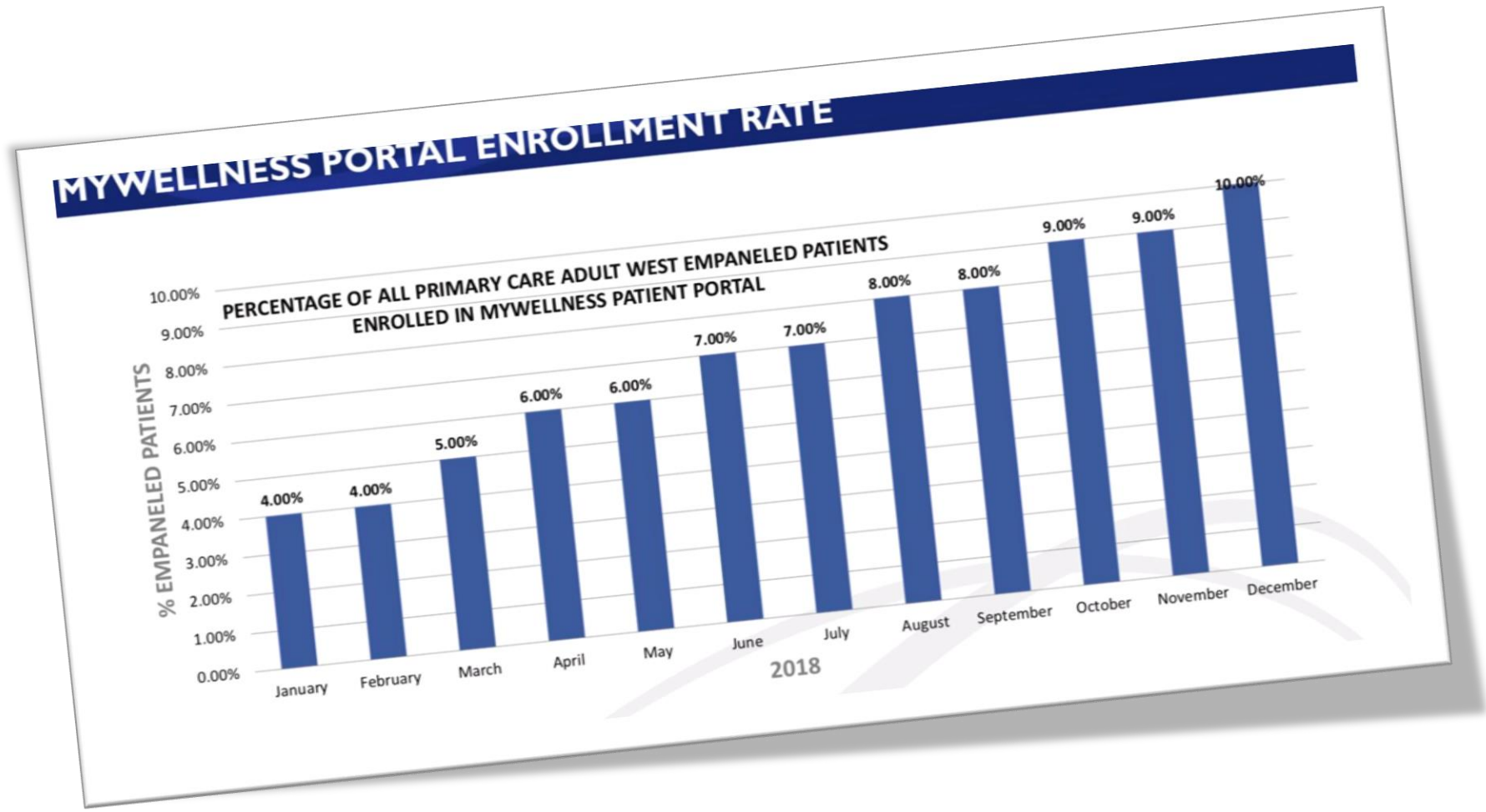
Patient Survey Results

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

Go Get The Data

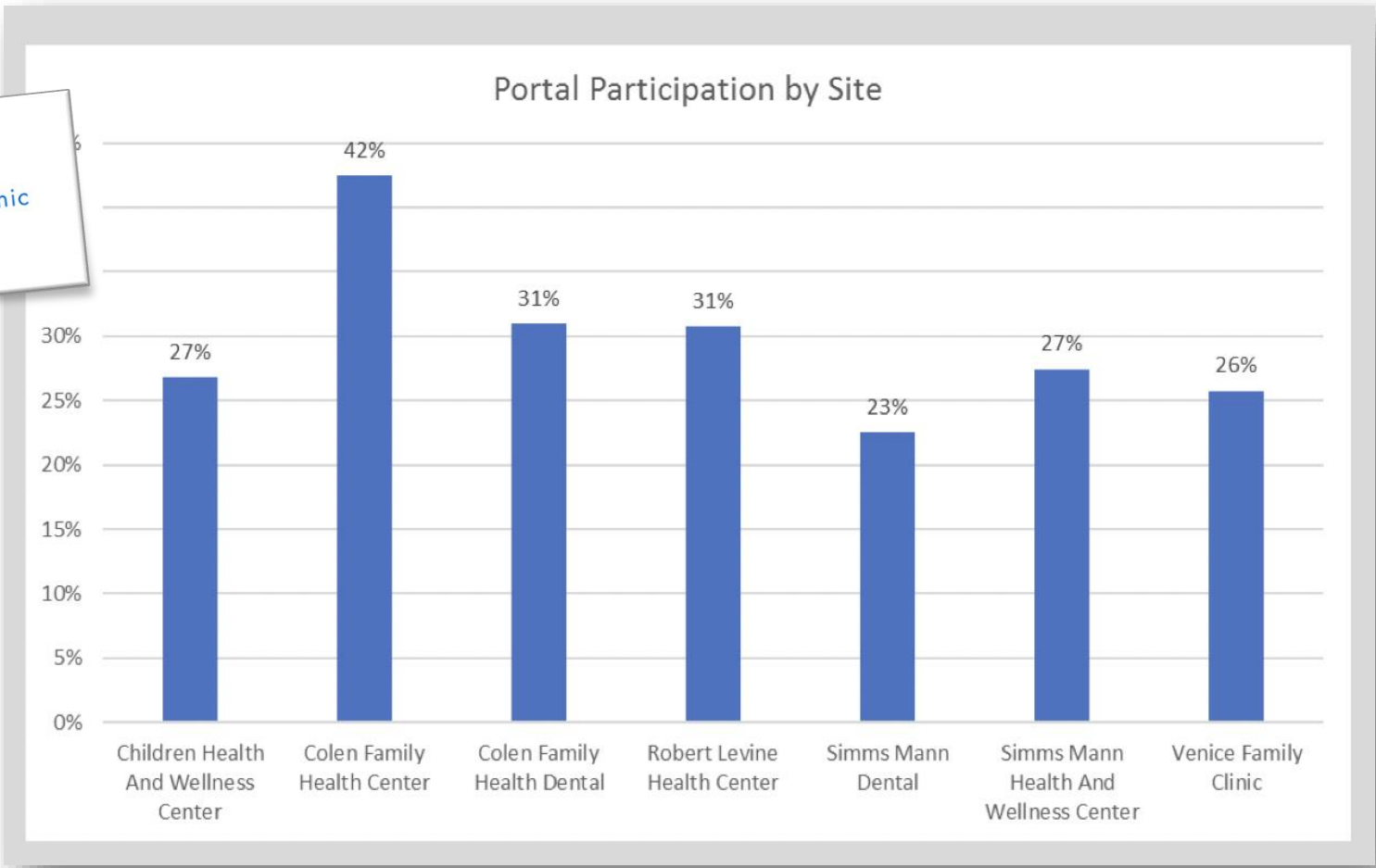
Enrollment Trends By Clinic



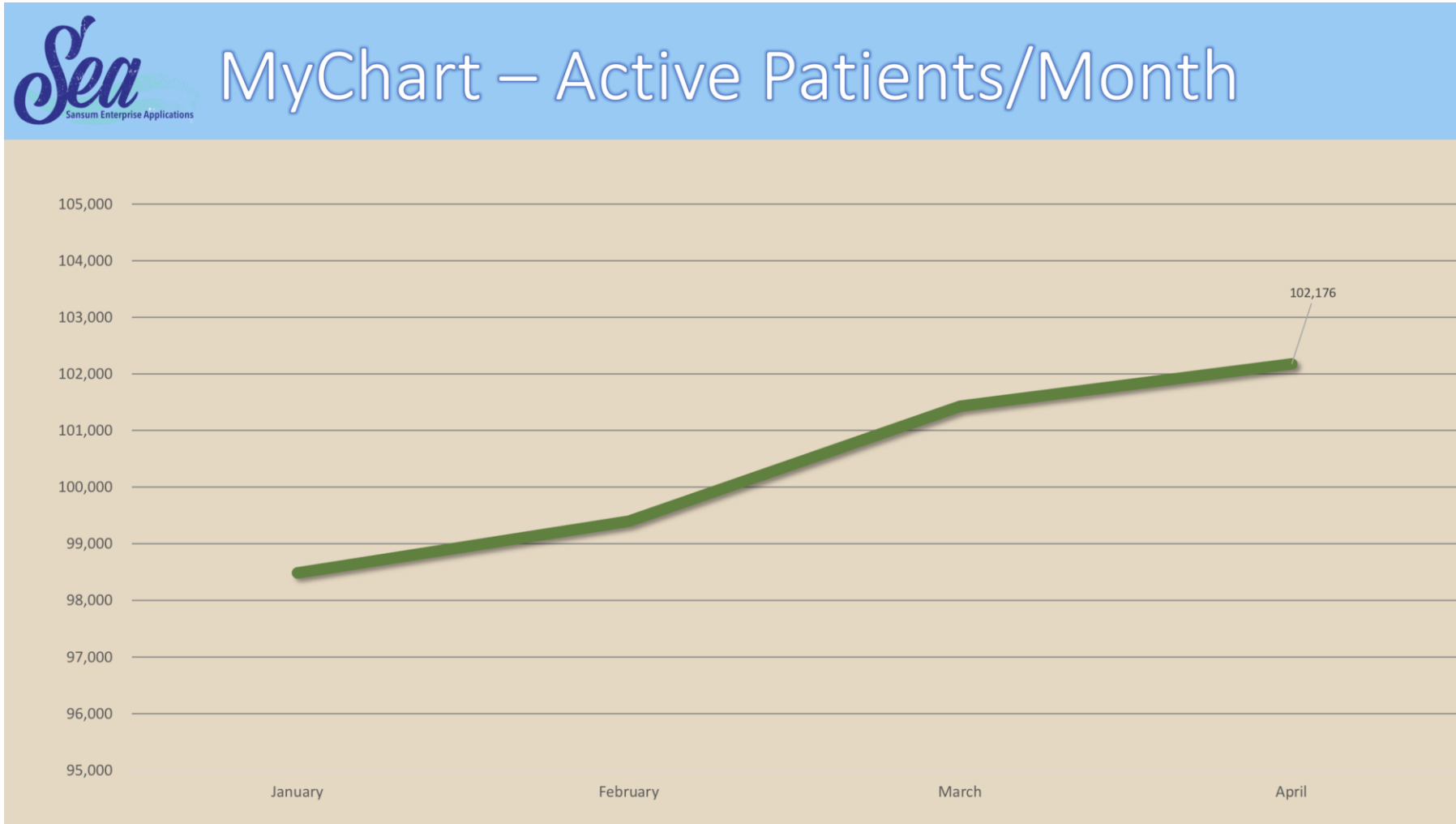
Enterprise-wide Views



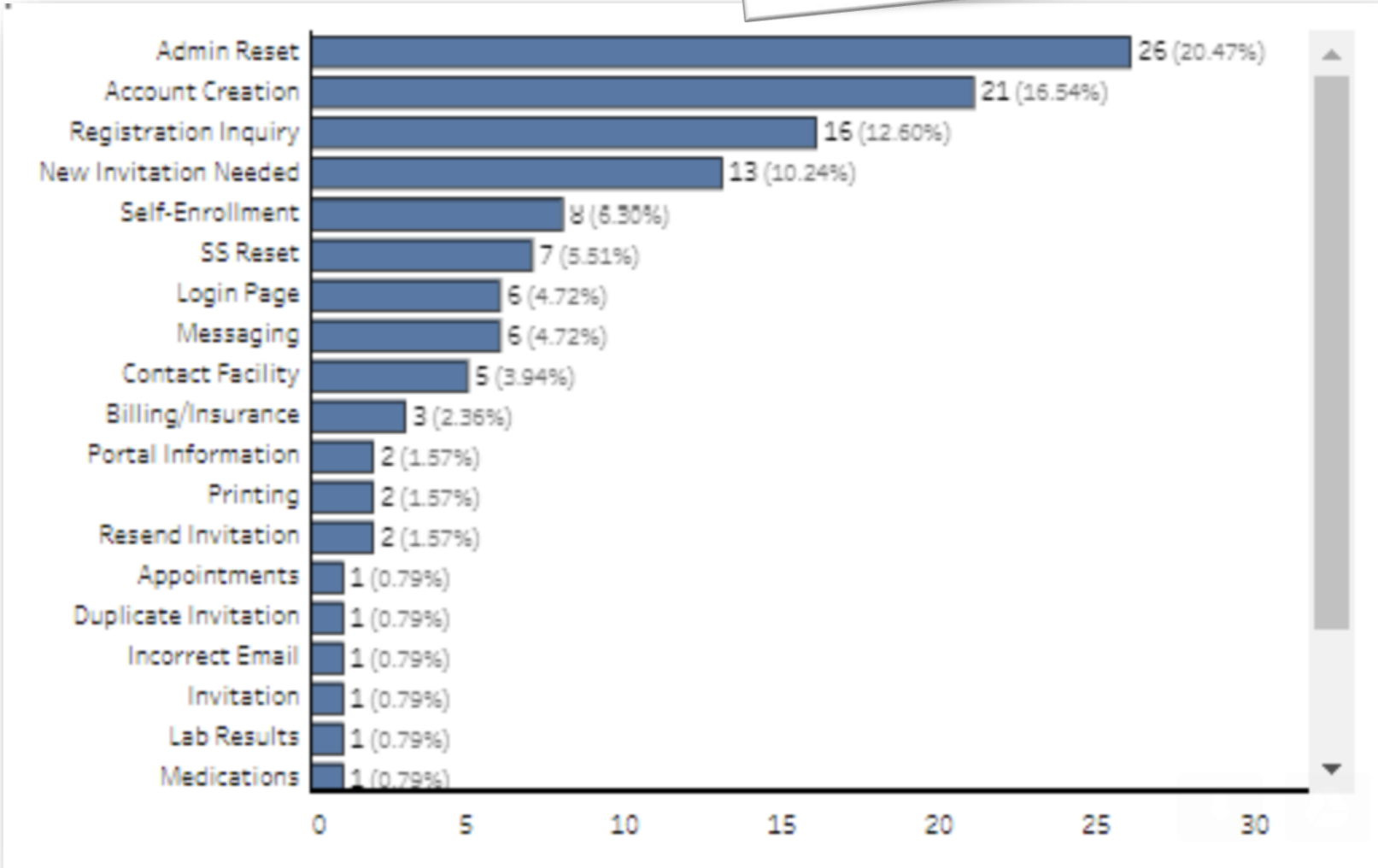
Enrollment
By
Site



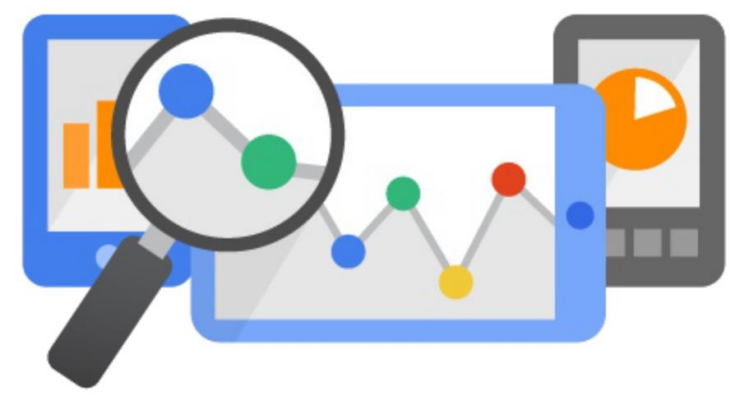
Active Portal User Report



Vendor Help Desk Report



Google Analytics



Top Visited Portal Functions

What pages do your users visit?

Page	Pageviews	P
/person/PERSON_ID/	6,668	
/person/PERSON_ID/health-record/results/	5,855	
/appointments	2,910	
/person/PERSON_ID/health-content/	2,153	
/messaging/	2,076	

Quote From The Field

“Our data show our patients are using the message function...

Patients are better at this than we thought.

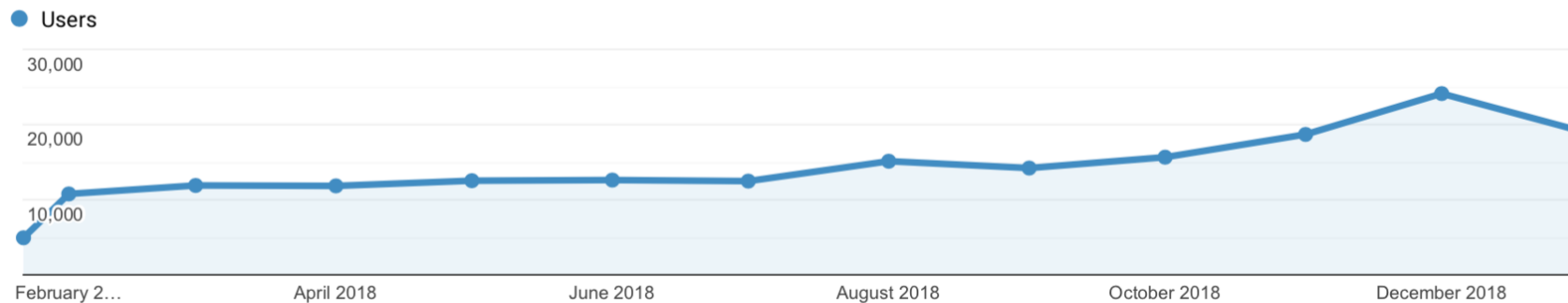
Writing an email is proving to be a more thorough and deliberate form of communication. Patients tend to supply the detail needed before sending the email, making follow-up or back and forth phone calls unnecessary. Both the sender and receiver of the message can process the information without distraction.”



Charles Kitzman
CIO, Shasta Community Health Centers

Comprehensive Metrics

Overview



Users
145,392



New Users
142,906



Sessions
367,070



Number of Sessions per User
2.52



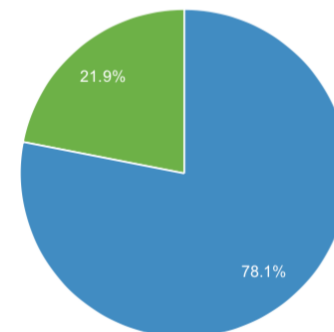
Pageviews
2,006,275



Pages / Session
5.47

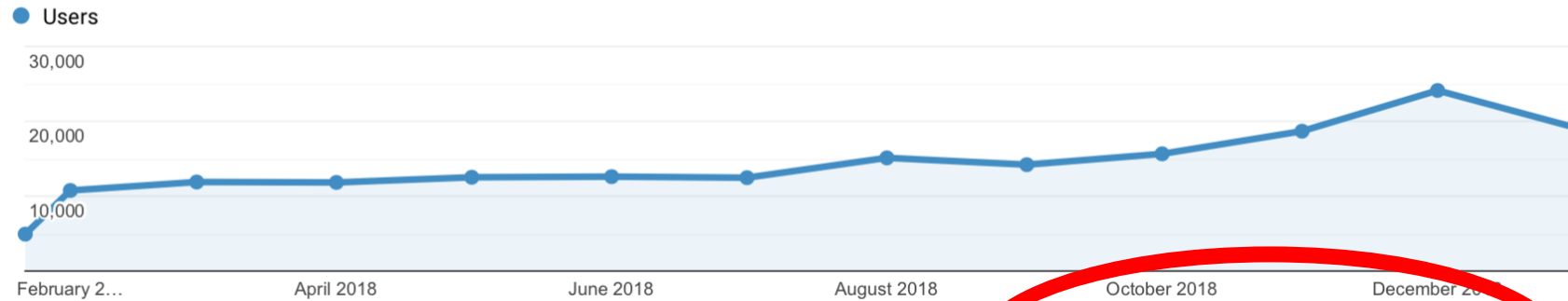


■ New Visitor ■ Returning Visitor



Comprehensive Metrics

Overview



Users
145,392

New Users
142,906

Sessions
367,070

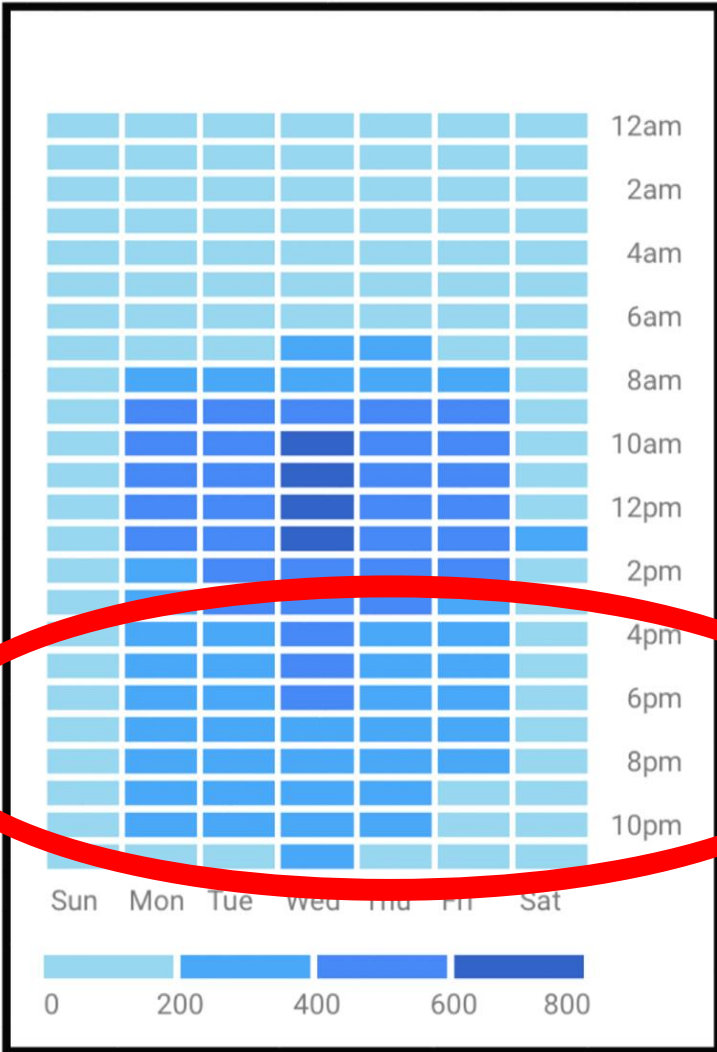
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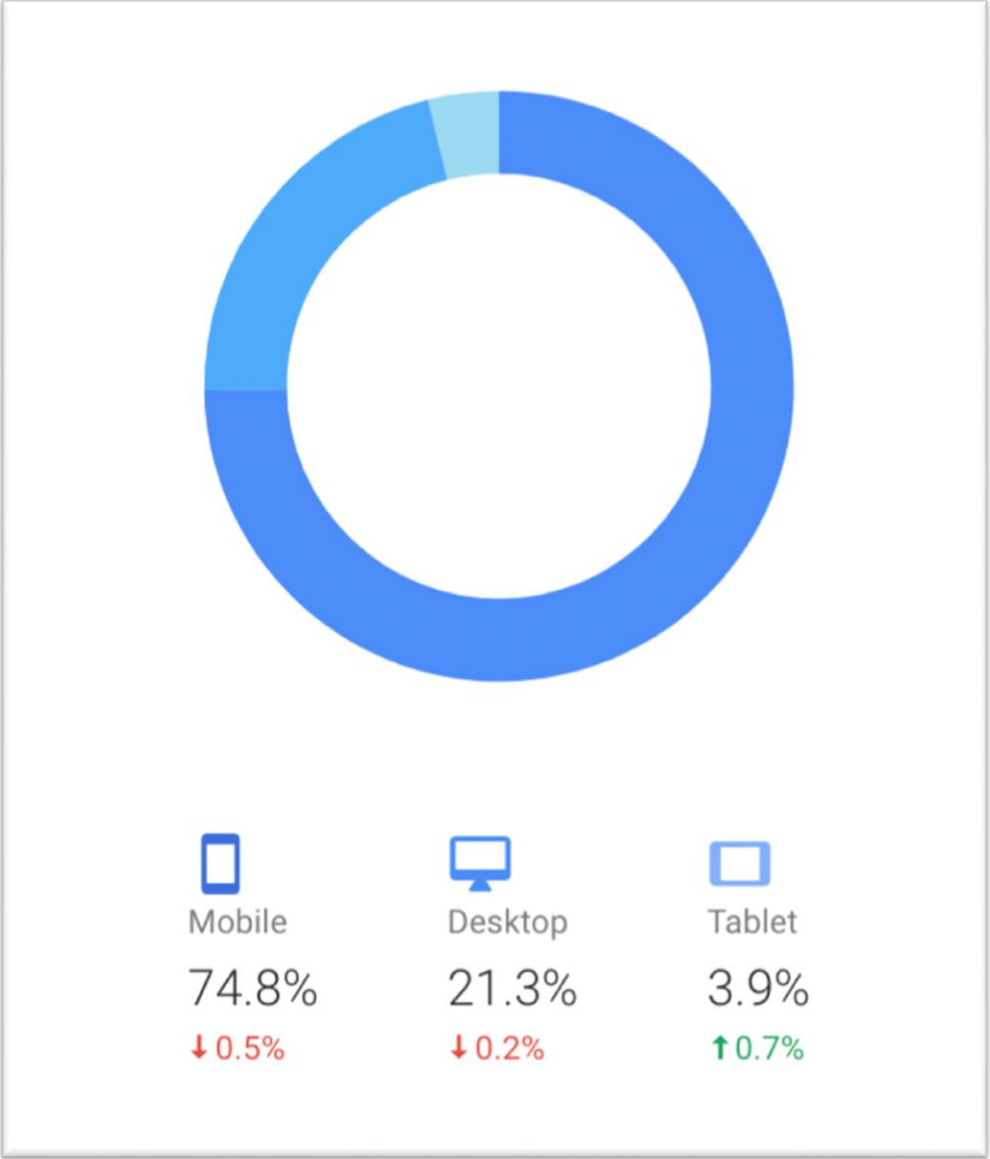
Pages / Session
5.47



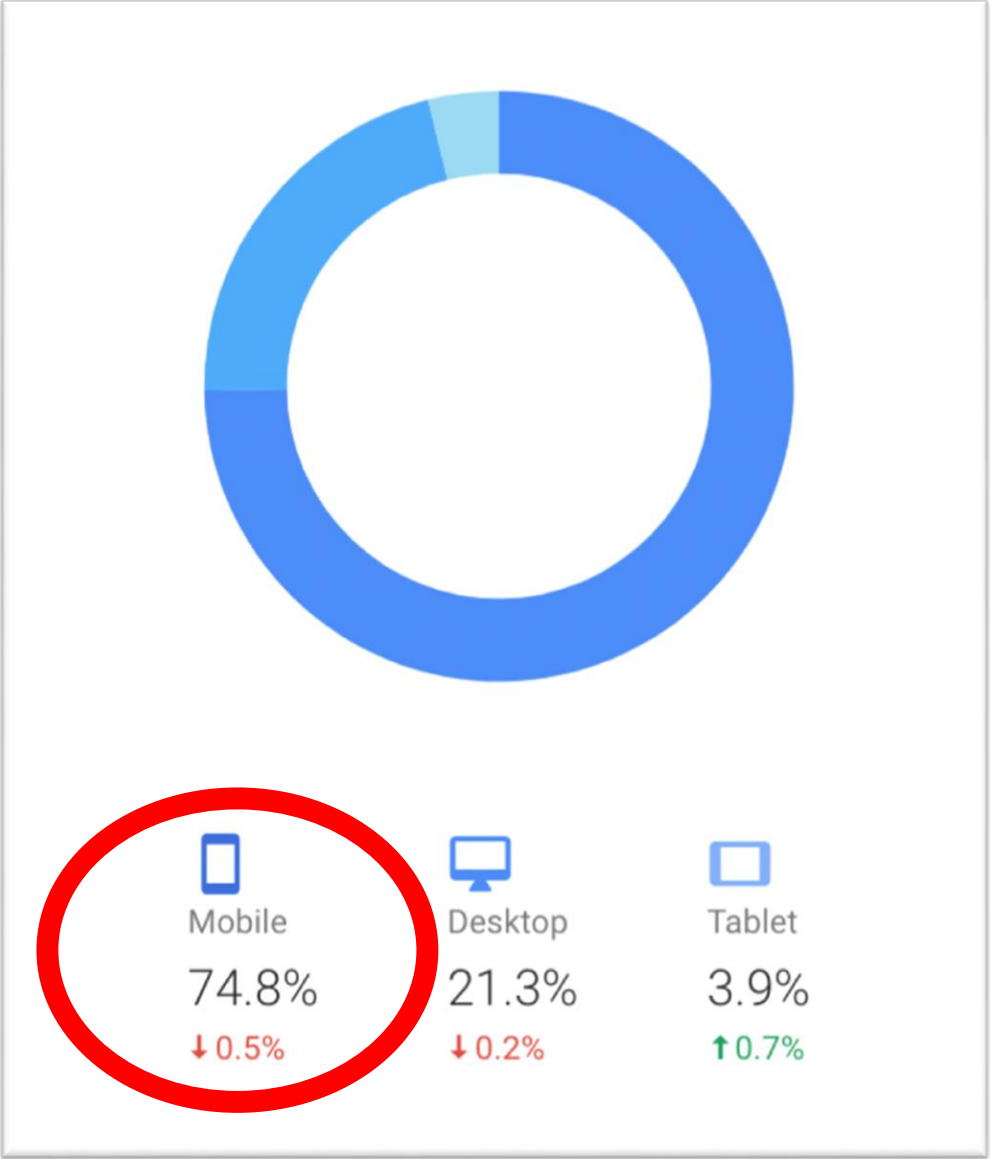
Users by Time of Day



How Do Your Users Access The Portal



How Do Your Users Access The Portal



Act on What You Learn

Target Market

Health Services **Public Health**

YOUR DOCTOR AT YOUR FINGERTIPS

MESSAGE YOUR PROVIDER ONLINE

Use the HealthLife app or the MyWellness Patient Portal

Available on the App Store
ANDROID APP ON Google play

Posters in Spanish and English



COVID-Specific Marketing Examples



Marketing

Online House Calls Available Now

Sansum Clinic is open and providing care to patients – and we're offering it in a new way to slow the spread of COVID-19.

Sansum Clinic Telehealth

- Stay home and have an online visit with your Sansum Clinic provider.
- We are now accepting new patients for Telehealth visits when appropriate.

sansum CLINIC
for your good health

Telehealth
Your Great House Call

Community Health is Our Commitment

WE ARE OPEN

- In-clinic appointments as needed
- Urgent Care for unplanned medical conditions
- Telehealth visits for primary & specialty care

Balancing the needs of all our patients with promoting the best course for public health, we are trying to reserve in-clinic appointments for patients who need to be seen in person. Many appointments are being conducted via Telehealth, allowing you to see a Sansum doctor from the safety of your home.

Please call (805) 681-7500, or visit telehealth.sansumclinic.org, and we can help you determine if a Telehealth visit is medically appropriate for you.

Urgent Care at 215 Pesetas Lane is open daily from 9:00 am to 4:00 pm for unplanned medical conditions.

Text #COVID to (805) 681-7500 for immediate information about COVID-19 symptoms, Telehealth appointments, and more.

sansum CLINIC
for your good health

200 Doctors. 30 Specialties. 23 Locations.
Working together to get our community through this challenging time.

SANSUMCLINIC.ORG

Free Use COVID Poster Templates



See Chat Box for Link to Free Use COVID Posters

¿Necesita una manera sencilla de obtener los COVID resultados de laboratorio?

Nunca tendrá que esperar por la llamada de su médico. ¡Ingrese a nuestro sitio web gratis para pacientes y vea los resultados de las pruebas de laboratorio en línea!

- Solicite o cambie citas
- Envíe un correo electrónico seguro a su médico.
- Vea los resultados de laboratorio.
- Solicite relleno de medicamento.
- Vea los expedientes médicos

¡Inscríbase hoy!
Para más información pregunte en recepción o visite el sitio web: www.portalname.com

Insert logo here

Want to Ask Your Doctor a COVID Question Any Time, Any Where?

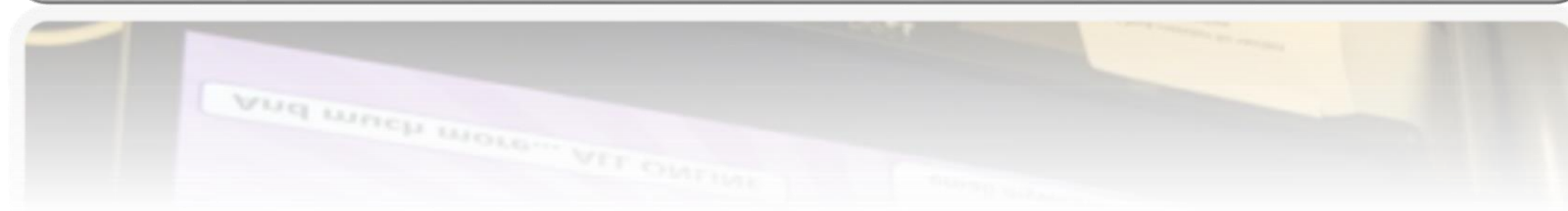
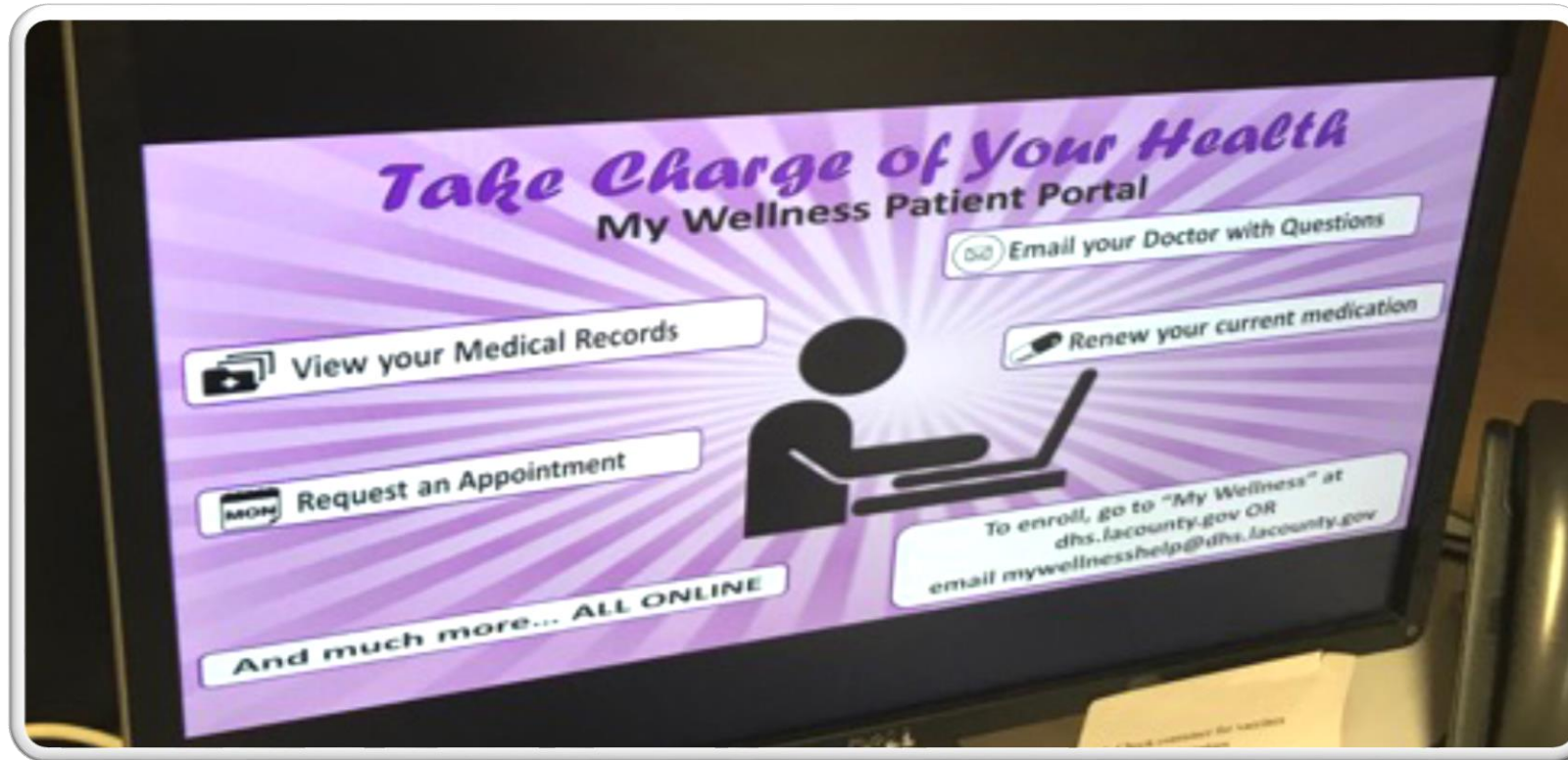
Join our **FREE Patient Website** and securely email your doctor online any time of the day!

- Request or Change Appointments
- Safely Email Your Doctor
- View Lab Results
- Request Prescription Refills
- View Medical Records

Sign Up Today!
For more information ask the front desk or go to www.portalname.com.

Insert logo here

Patient Waiting Room Screen Savers



Have Your Clinical Leaders Help Craft the Training

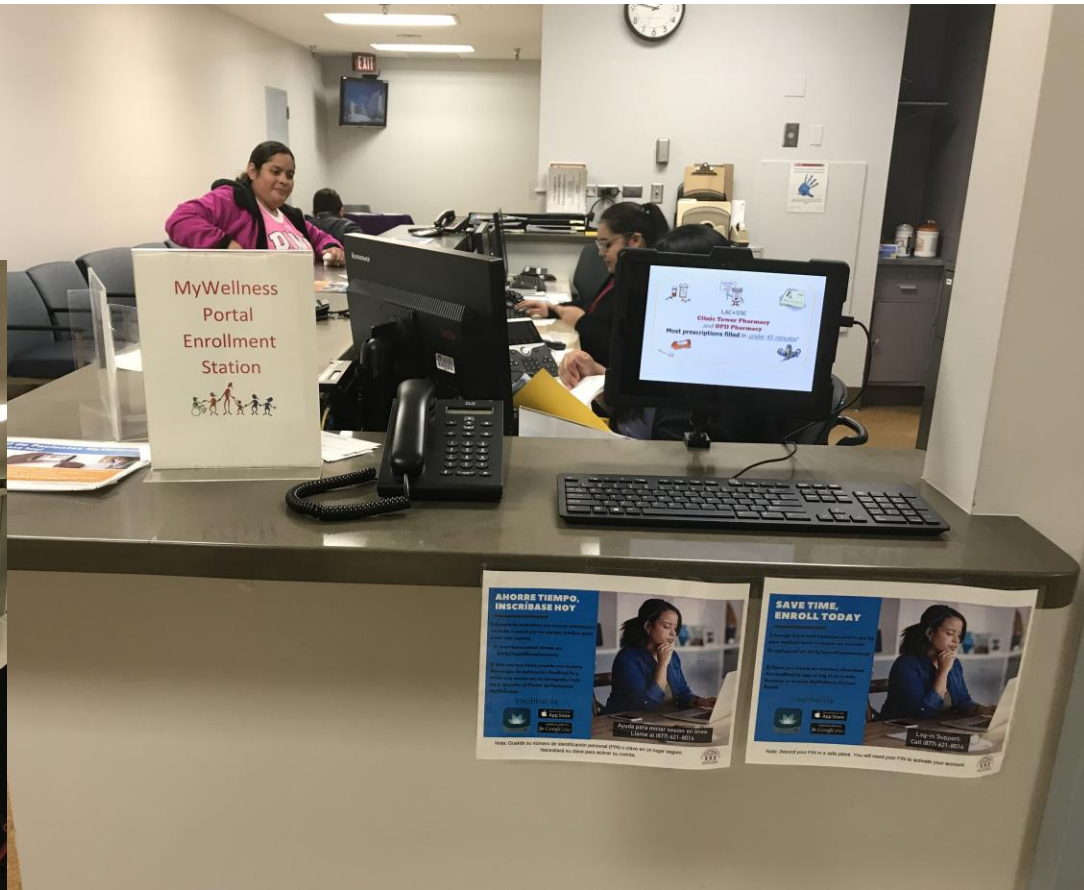
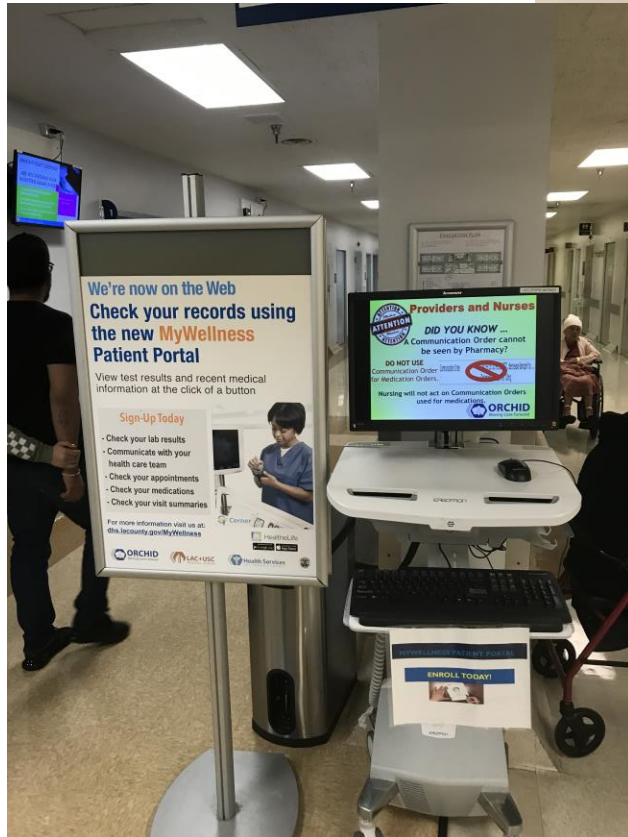


Playbook



**Thanks to the LA DHS Primary Care Workgroup on MyWellness: Barbara Rubino, MD (LAC+USC), Jen Chen (Mid-Valley), Shari Doi (PAC)*

Try Unique IT Support



Enrollment Made Easy

Access to Portal



**Dedicated
Marketing
Name for Portal**



Patient Portal Update E-mails

My HealtheVet Update | June 17, 2020 *Family/Health x

My HealtheVet <veteranshealth@public.govdelivery.com> [Unsubscribe](#)
to me ▾



Prescription for Better Messaging

Advice on clear communications

Secure Messaging puts you in direct access with your health care team, without call center hold times. With just a few tips from VA health care professionals, you'll be using it like a pro in no time. [Learn more.](#)



Rx Refills During the Pandemic

Keeping your medications stocked is crucial for your health. Make sure you know all of your options to request your prescription refills. [Learn more.](#)



Top Health Threats to Men

The top health threats to men aren't mysterious. Recognizing these possible dangers to your health and taking preventative steps can help you lead a healthier life. [Learn more.](#)

Friendly and Effective Competition



Chat Link



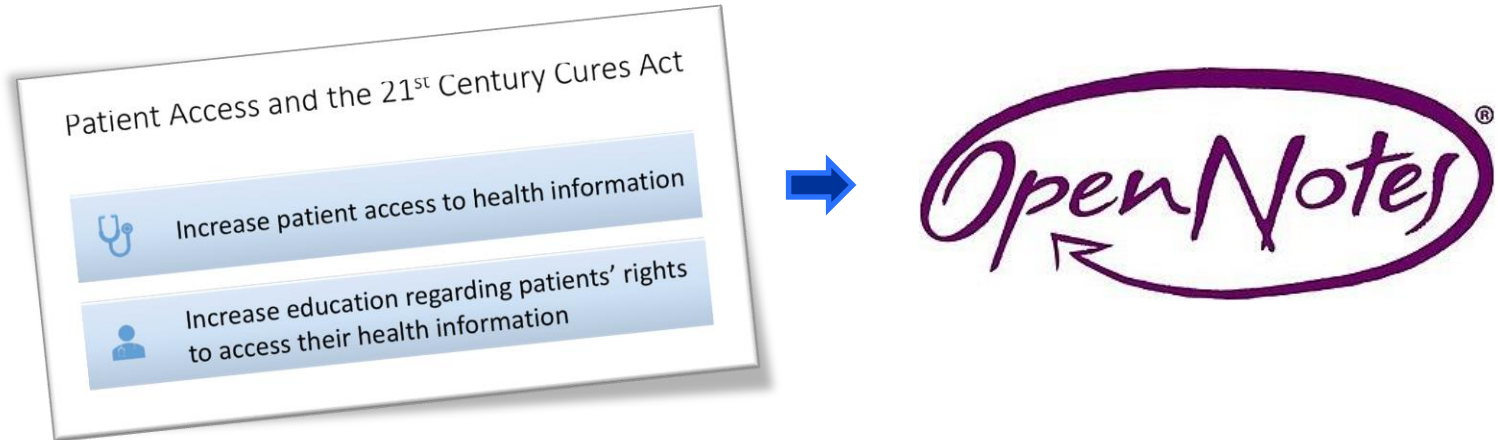
Call Center Support

- Text link to enrollment web page
- Call all who have a e-mail address on file



Best Practices

Activate New Portal Functions



- Complies with requirements of 21st Century Cures Act for patient access to medical records
- COVID win: inpatients who are not allowed to have visitors can have caregivers/health proxies use the portal to:
 - Review Open Notes for updates on care
 - Message the doctor with questions
 - Keep track of medication changes

Activate New Portal Functions

Flu Vaccine Reminder and eClipboard Pre-visit Check-in



Cerner Guide
in the
Playbook

Patient:



Flu Shot
Site:



Logs into Portal



Patient Checks in for Flu Shot



Completes Form,
Makes Appointment



Data is Imported into
EHR

**Thanks to the LA DHS Focus group on Flu Vaccines led by Barbara Rubino, MD (LAC+USC)*

Activate New Portal Functions

- COVID Positive Patient Education and Care
- Adolescent Use of Portal
- Behavioral Health Integration

Engagement

Q&A

Build a Strategic Governance Structure

Quote From The Field

“Once we get patients in the digital front door they see that there are so many tools they can use to keep track of their health,” she says. “It’s really the foundation for our health system and where we do a lot of our work around patient engagement. We want this portal to be an integral part of the fabric of how we deliver care to all our patients.”



Anshu Abhat, MD
Internist and Patient Portal Team Leader
Los Angeles Department of Health Services

Survey

What Governance Structure Do You See Patient Portals Falling Under in One Year?
Pick 1.

- The IT Department will have a specific Patient Portal Oversight Team
- Our Enterprise will have a Virtual Health Department and a Patient Portal Oversight Team will be in it
- There will not be a specific Patient Portal Oversight Team function – we will continue to address portal issues in current clinical and support oversight bodies
- Other: put response in chat box

Governance

Q&A

Reminder:
Steps You Can Take
Right Now



Steps You Can Take Right Now



Don't Forget the Playbook!

Senior Leadership Announcement

Quick Environmental Scan

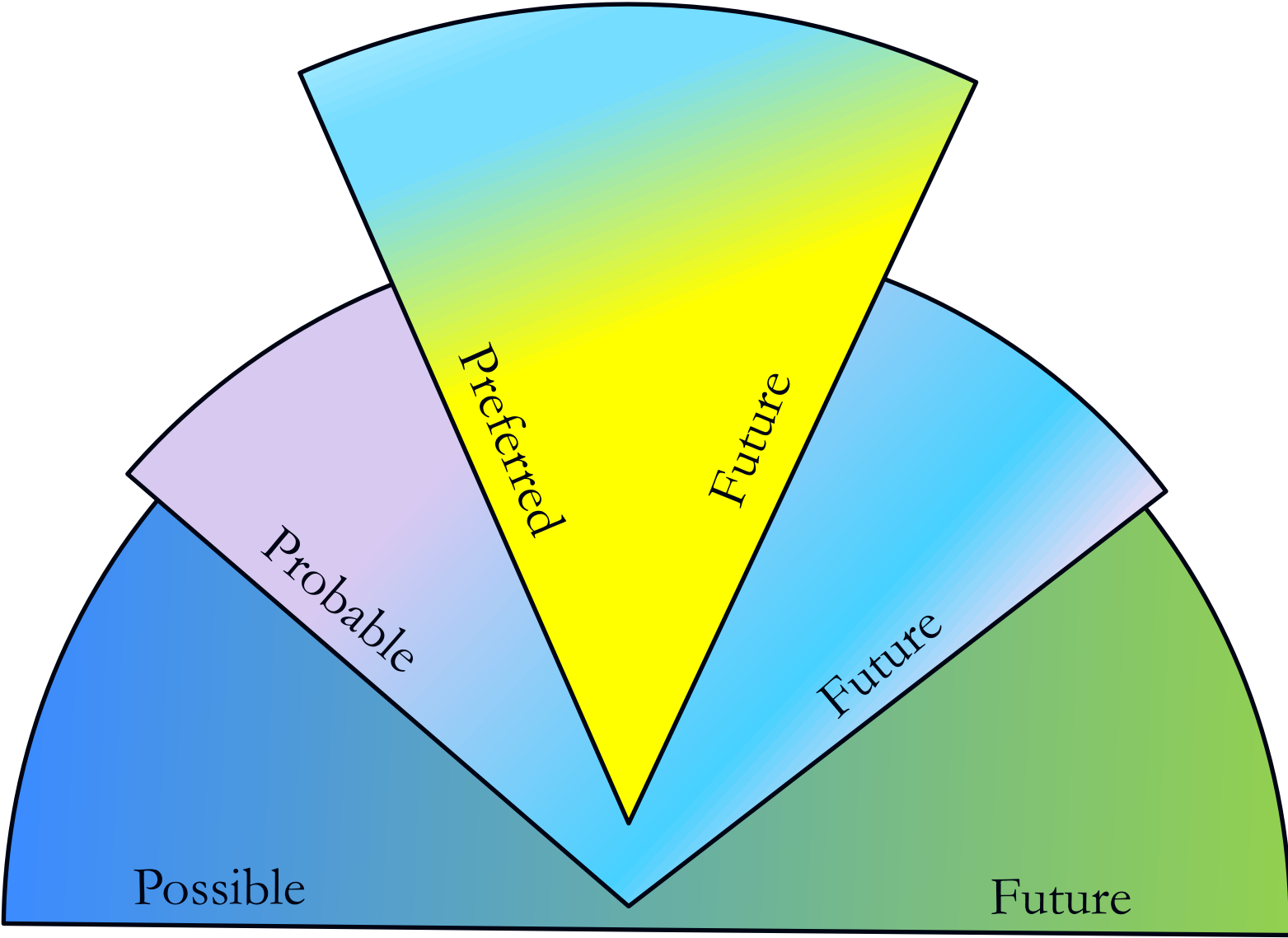
C-Suite and Team Prioritization Summit

Build Agile Action Team

Collect Data – Metrics – Build Just-in-Time Knowledge – Adjust Plan

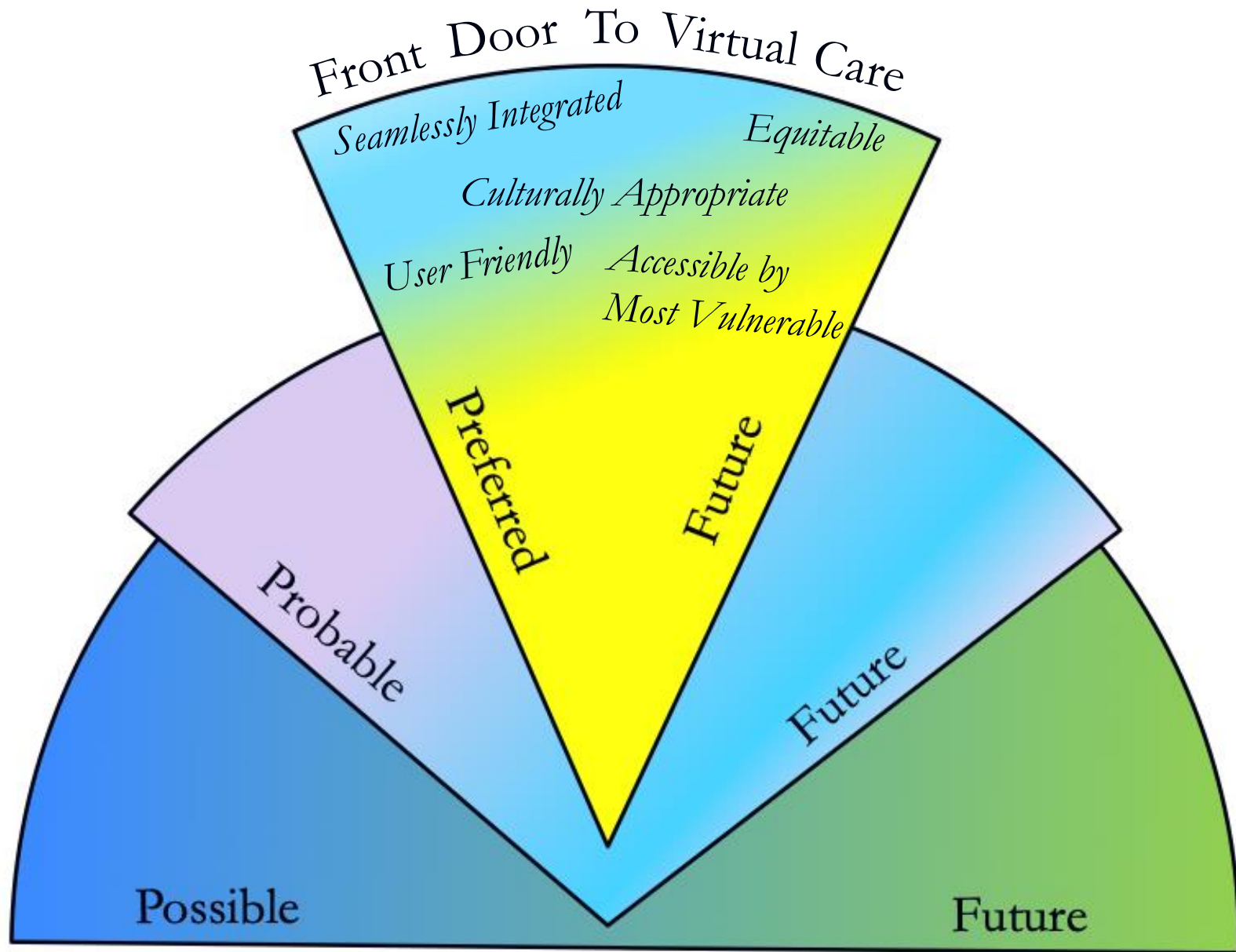
PDCA – Market it - Adjust it - Go

Create a Future
You Want





Playbook



Any Final
Comments/
Questions?

WRAP UP

Upcoming Webinars

Understanding and Addressing Digital Disparities. Nov 9 (12-1pm)

Contra Costa Health Services' Digital Disparities Workgroup will discuss early efforts to understand and address disparities in telehealth. [Register](#)

Getting It Right: Matching Patient Preference/Access, Provider Location, and Visit Modality. Nov 16 (12-1pm)

Leaders from Alameda Health System and Riverside University Health System will share approaches to adapt provider scheduling templates in response to COVID-19. [Register](#)

Best/Next Practices in Pediatric Well-Care and Provision of Immunizations. Nov 30 (12-1pm)

Pediatric leaders from Los Angeles Department of Health Services and Riverside University Health System will present strategies to maximize pediatric well-care and immunizations during the pandemic and beyond. [Register](#)

SNI Request for Information

Care Team Staffing Ratios/Roles + Telehealth Volumes.

Based on member interest, CAPH/SNI is collecting staffing ratios and telehealth volumes to share out. Survey results will also help inform CAPH/SNI's policy work around telehealth reimbursement. Please submit one response per system.

[Click to complete the survey](#)

Patient-Friendly Messaging and Materials for Video Visits.

SNI is gathering patient-friendly communications materials (e.g., scripts, marketing collateral) that promote uptake of video visits. Please send materials to [Zoe So](#). Example materials from Contra Costa are now available on [SNI Link](#).

SNI Link

SNI Link/Telehealth

<https://safetynetinstitute.org/member-portal/programs/telehealth/>



ABOUT SNI

WHAT WE DO

MEMBER SUPPORT

PUBLICATIONS

CONTACT



TELEHEALTH

HOME » SNI LINK » PROGRAMS » TELEHEALTH

Overview

SNI is developing new technical assistance to support members' transition to telehealth, both in the immediate term to respond to the COVID-19 emergency and in the long-term, as members incorporate telehealth into standard operations.

Contact [Zoe So](#) for more details.

Webinar Series: Technical Considerations in Telehealth

This series will address the technical aspects of telehealth implementation, including software

SNI LINK

- » Programs
 - » PRIME
 - » Medicaid Managed Care
 - » Global Payment Program
 - » Whole Person Care
 - » Alternative Payment Models

SNI Link

SNI Link/Telehealth

<https://safetynetinstitute.org/member-portal/program>



ABOUT SNI WHAT WE DO MEMBER

TELEHEALTH

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SNI LINK

- » Programs
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- » Global Payment Program
- » Whole Person Care
- » Alternative Payment Models

Your thoughts, please



**PLEASE COMPLETE
THE POP-UP
SURVEY**