

# Strategies to Increase Patient Portal Utilization at Riverside University Health System

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Thursday, May 27, 2021  
12-1pm

[Recording Link](#)

# Housekeeping

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Please stay on mute if you're not speaking, and save questions for designated Q&A



Chat in questions at any time



Feel free to leave your video off during the meeting, but you're encouraged to turn it on when you're asking a question



This meeting is being recorded for those who can't attend live



Materials will be sent out after the meeting

# Agenda

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Time	Topic	Lead(s)
5 min	<b>Welcome and Introductions</b>	Zoe So Thuy-Ann Le
2 min	<b>Announcement: Patient Portal Active Use Improvement Guide and Resource Toolkit</b>	Thuy-Ann
40 min	<b>Strategies to Increase Patient Portal Utilization at Riverside University Health System</b>	Melissa Taylor, BS, RN-BC Kathleen Lima, DO Evelyn Garcia
12 min	<b>Q&amp;A</b>	All
1 min	<b>Wrap-up &amp; Announcements</b> <ul style="list-style-type: none"><li>• Post Event Survey</li></ul>	Zoe

# Introduction

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**Thuy-Ann Le, MPA, MPH**  
Associate Director of Programs  
California Health Care Safety Net Institute  
[tle@caph.org](mailto:tle@caph.org)

# Coming Soon

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- Patient Portal Active Use Improvement Guide and Resource Toolkit
  - A Step-by-Step Guide and Set of Resources to Successfully Increase Patient Portal Active Use
- Proven processes and tools to guide patient portal deployment efforts
- Developed in collaboration with Jim Meyers, DrPH

# Strategies to Increase Patient Portal Utilization at RUHS

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Melissa Taylor, BS, RN-BC, Clinical Informatics Officer, RUHS Informatics Team

Kathleen Lima, DO, RUHS Pediatric Clinic Director

Evelyn Garcia, Healthcare Administrative Manager



# Strategies to Increase Patient Portal Utilization at RUHS

Melissa Taylor, BS, RN-BC - Clinical Informatics Officer

Kathleen Lima, DO – RUHS Pediatric Clinic Director

Evelyn Garcia – Healthcare Administrative Manager



- Introductions
- The Value of the Patient Portal
- MyChart Adoption at RUHS
- Assessment & Recommendations
- Key Takeaways & The Road to Process Improvement
- Clinic Spotlight: RUHS Pediatric Clinic

# Agenda





# Do patient portals improve health outcomes?

“While the evidence is currently immature, patient portals have demonstrated benefit by enabling the discovery of medical errors, improving adherence to medications, and providing patient-provider communication, etc.”<sup>4</sup>

- Significant association between portal use and health outcomes was not observed in some studies [[2](#),[4](#),[20](#)] but was observed in others [[54](#)]
- Patient portals facilitated discovery of EMR errors by patients [[24](#),[26](#),[30](#),[54-56](#)]<sup>4</sup>



# What are some ways portals improve the patient & provider experience?

- Improved adherence to medication  
[[3](#),[9](#),[39](#),[43](#),[52](#),[57](#)]
- Improved patient satisfaction  
[[3](#),[29](#),[30](#),[39](#),[45](#)]
- Enhanced patient-provider communication  
[[6](#),[30](#),[40](#),[43](#),[52](#)]
- Improved patient safety [[6](#),[26](#),[52](#),[55](#)]
- Reduced patient uncertainty and anxiety  
[[3](#),[24](#),[36](#)]
- Increased patient engagement  
[[6](#),[19](#),[24](#),[30](#),[41](#),[43](#),[45](#),[51](#),[52](#)]<sup>4</sup>



A large, abstract teal watercolor splash graphic on the left side of the slide, with various shades of blue and green blending together.

## What are some of the biggest barriers to patient portal adoption?

- Lack of appropriate training [[33](#)]
- Doubt of the portal's usefulness [[38](#)]
- Lost passwords [[38](#),[39](#)]
- Difficulties in using portals [[16](#),[33](#),[34](#)]
- Anxiety associated with viewing personal medical information [[38](#)]
- Data security and privacy concerns [[34](#),[40](#)]
- Lack of encouragement from providers [[3](#),[40](#)]<sup>4</sup>

# Leveraging the Patient Portal



- Patient portals are primary tools for engaging patients as partners in their healthcare, **but only if patients enroll and use them.**

<sup>1</sup>



- Portals provide patients with unprecedented transparency into health information, which evidence suggests can **prevent medical errors, increase shared decision-making, and improve health outcomes.** <sup>2</sup>



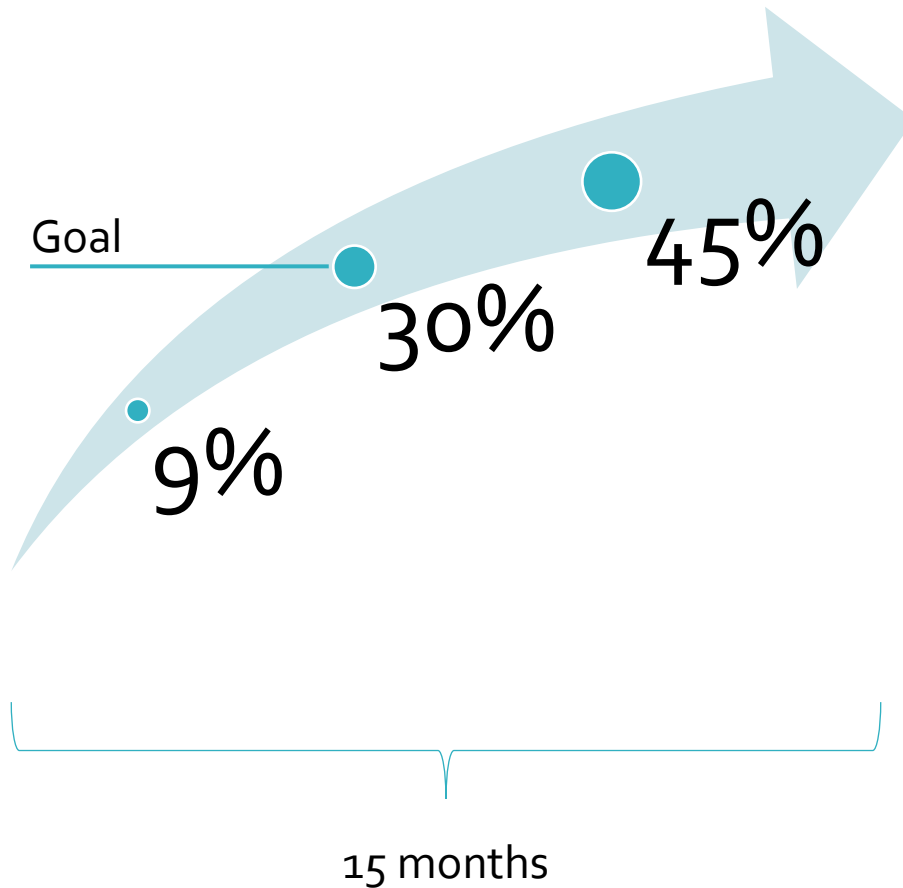
- It takes more than marketing and promotion to increase enrollment, it takes **broad culture change.** <sup>1</sup>

# Case Study

"One of the first things we did was try to figure out why. Is it our unique population?

We're a county hospital, a safety net healthcare system and we have some challenges. We have a lot of different languages patients are speaking, we have socio-economic disparities that we try to be attune to. Was it technology-related? We really focused on the ambulatory sector, we did some deep dives, we did lots of observations, we got into the clinics, we talked to a lot of people and we talked to patients," he says.<sup>3</sup>

## MyChart Activation Rates Maricopa Integrated Health System





## SMART

To understand how to  
set and measure the  
right goal



## Evidence-Based

To create workflows  
and goals based on  
best practices for  
enrolling patients



## Culture Change

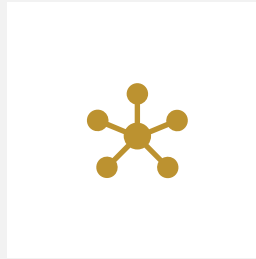
To identify  
collaborators across  
departments to  
support normalizing  
portal use as standard  
care

# Objectives





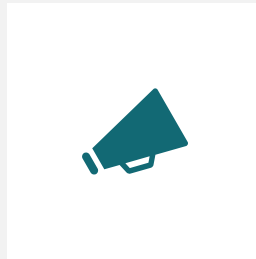
Increase  
Access  
To Care



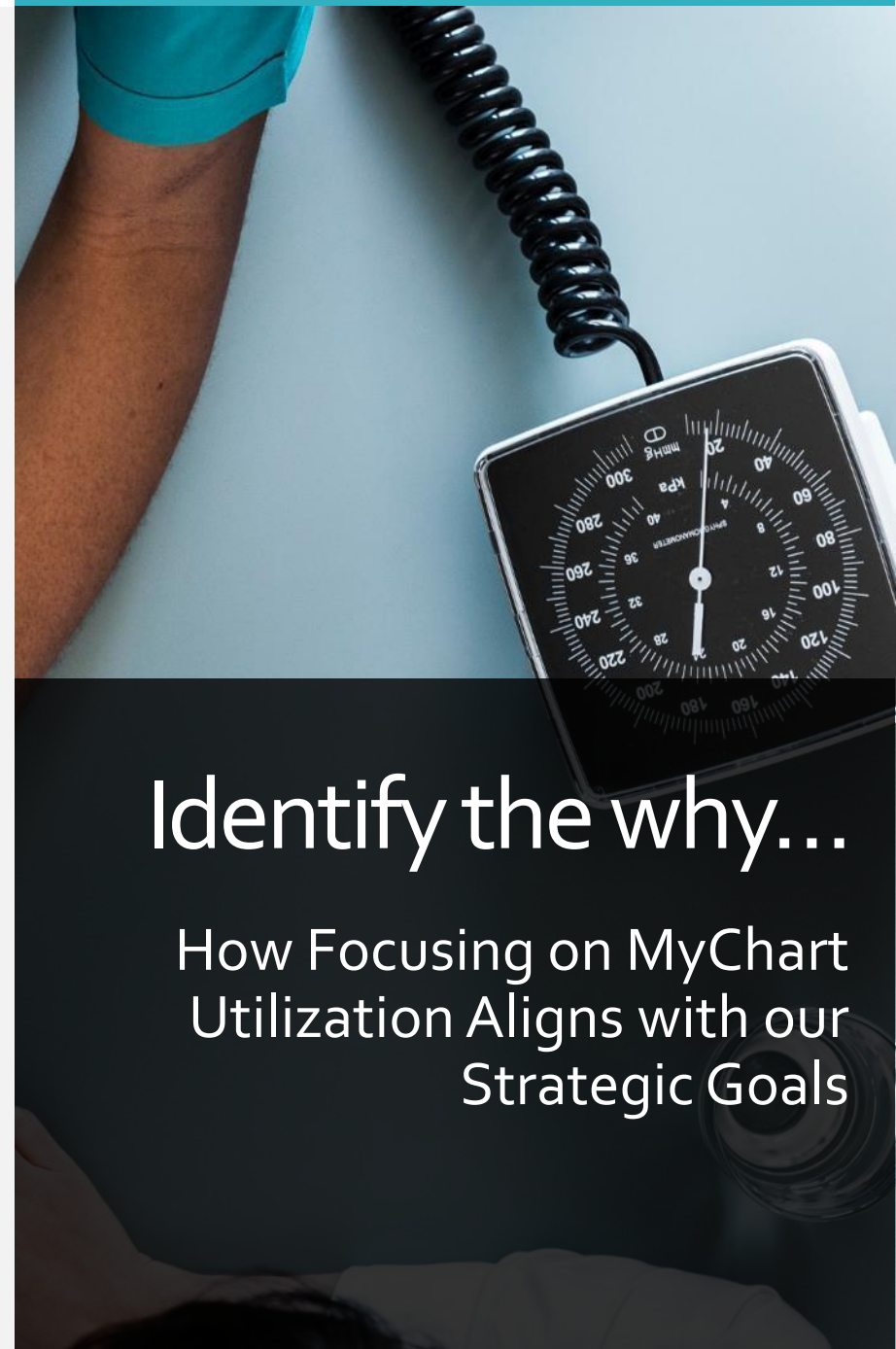
Staff, Provider & Patient  
Engagement



Close Care Gaps  
in Underserved  
Populations

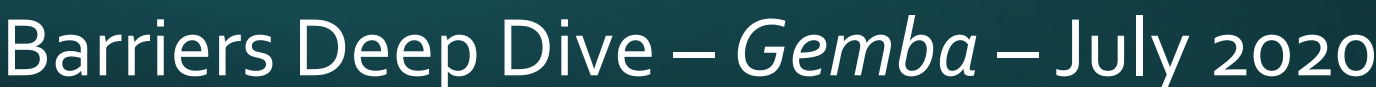


Promote  
LEAN  
Strategies



# Identify the why...

How Focusing on MyChart  
Utilization Aligns with our  
Strategic Goals



# Corona CHC – Lessons Learned

## Assessment / Opportunities



### Person-based

Staff & provider encouragement and support of patients to sign up for MyChart; technology support for patients



### Tool-based

Metrics & data; user security; system enhancements & features; training tools & elbow-to-elbow



### Task-based

Rooming workflows, schedule utilization; rescheduling practices; outbound calls



### Environment-based

Public Wifi, signage and marketing; huddles & staff awareness, healthy competition



### Organization-based

Cultural adoption, change management; Web-presence, pull (not push) mentality

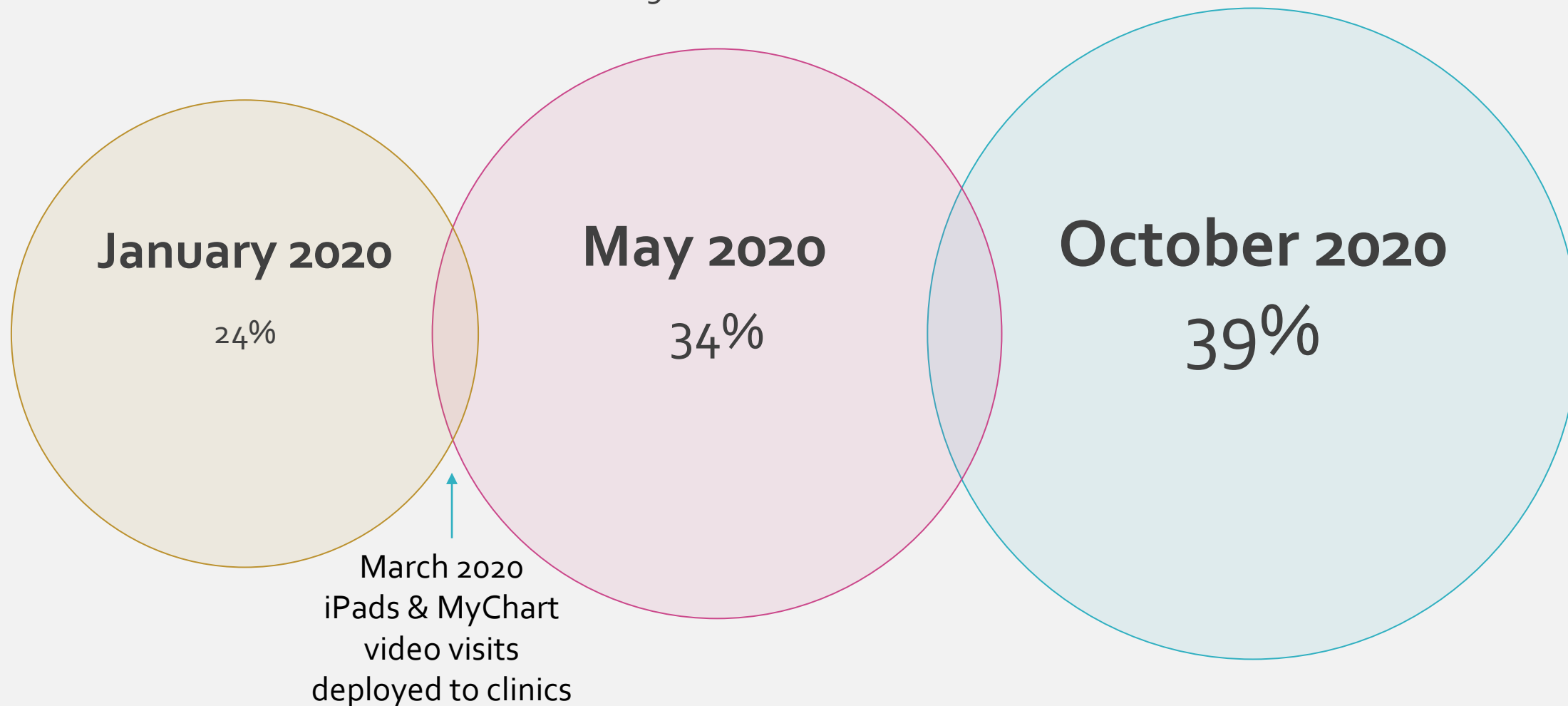
# Identify Key Metric Baselines

Overall RUHS MyChart  
Activation Rates  
(Ambulatory)



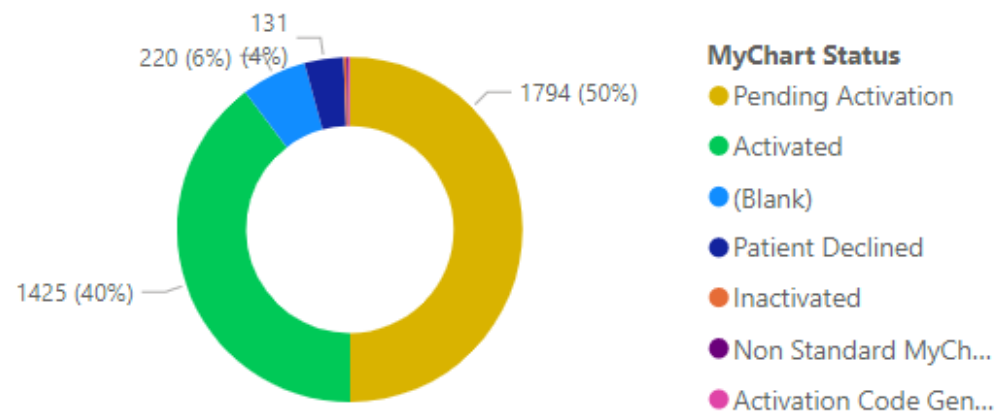
# % of Patients with Scheduled Visits that are Active on MyChart 2020 Stats Q1-Q3

COVID19 and the rush to Telehealth



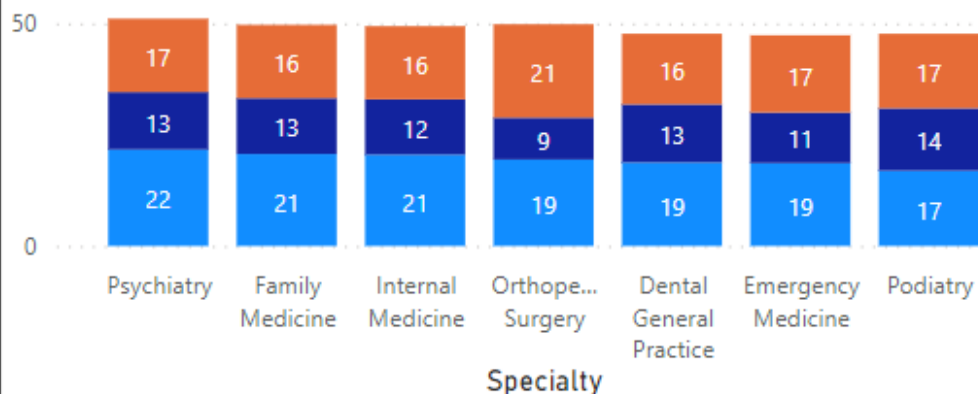


## MyChart Activation status for completed Virtual visits

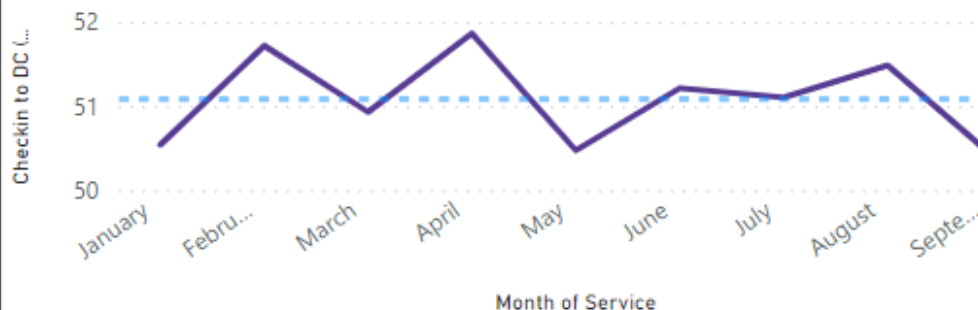


## Cycle Time (minutes) by Specialty

● Check-in to Rooming ● Rooming to Physician ● Physician to DC



## Checkin to DC (minutes) by Month of Service

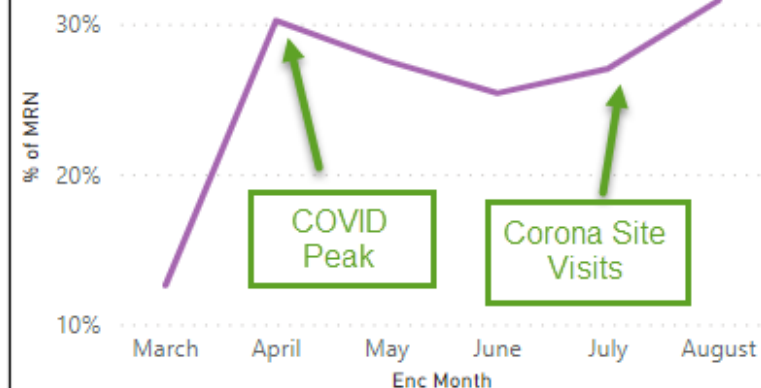


# Corona CHC: Completed

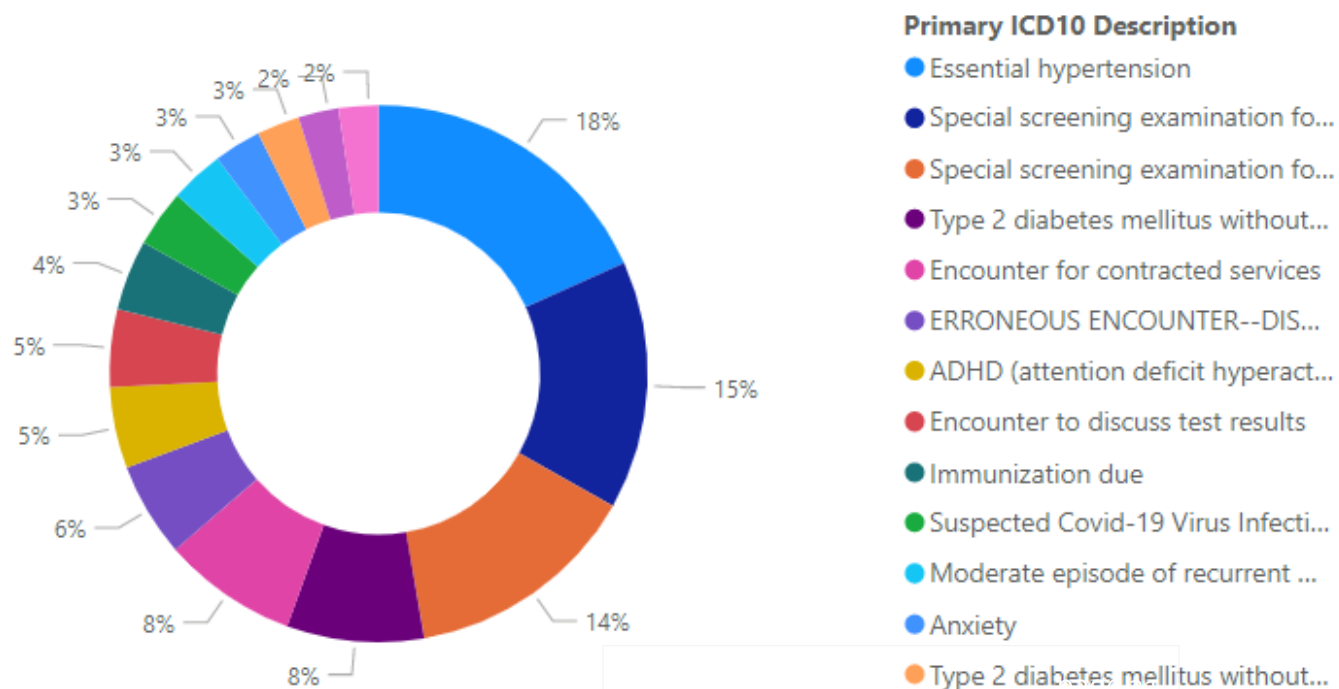
## Type of Virtual Visits



## MyChart activation rate by Month



## Top Diagnoses



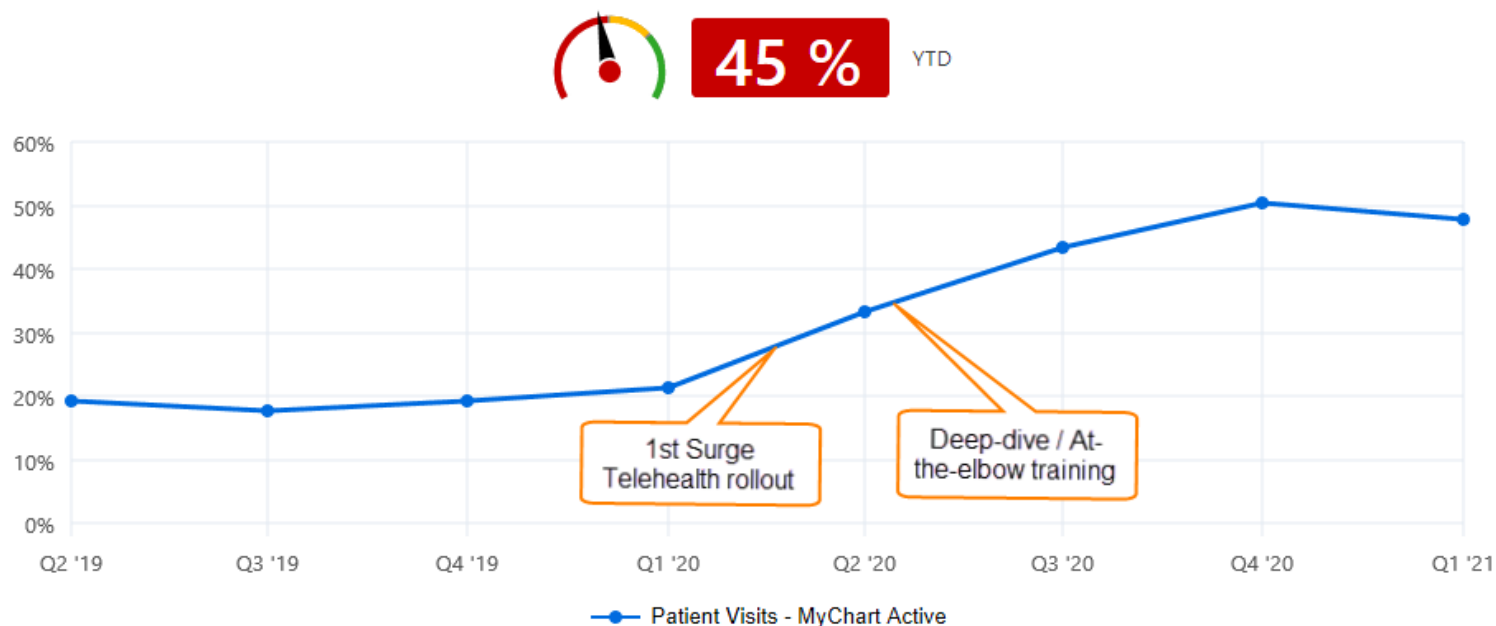
# Identify Key Metric Baselines

Corona CHC  
Activation Rates  
(Ambulatory)

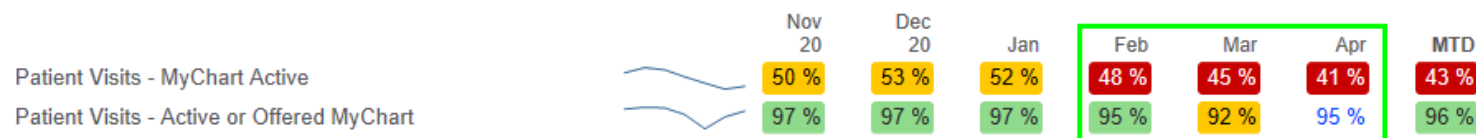
## MyChart Department Utilization

Department: RUH CORONA CLINIC

### MyChart Ambulatory Activation



### MyChart Activation Trends







“If you build it, they will come.”

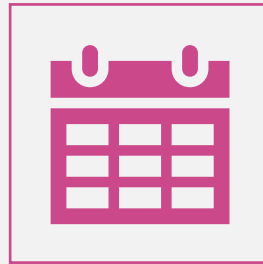
# (Just a Few) Key Features

Effort to increase enrollment/utilization will result in better patient engagement & long-term time-savings for Operations.



## MyChart Messaging

The primary method for communicating with our patients; questionnaires & patient-entered data



## Self-Scheduling

Direct & Open; reduced burden on call center



## Fastpass

Automated waitlist & access to specialty care



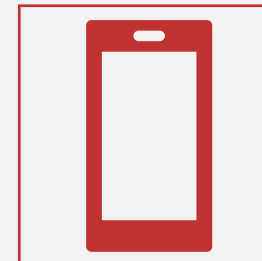
## Access to Results & Records

Reduced calls to clinics; Adult and Pediatric proxy



## Medication Refills

Provider productivity and patient satisfaction



## Telehealth

Access and convenience for patients; safety and reduced strain on resources

# Marketing Efforts

**MyChart**

**Communicate with your doctor**  
Get answers to your medical questions from the comfort of your own home

**Access your test results**  
No more waiting for a phone call or letter – view your results and your doctor's comments within days

**Request prescription refills**  
Send a refill request for any of your refillable medications

**Manage your appointments**  
Schedule your next appointment, or view details of your past and upcoming appointments

**Manage your bills**  
Pay balances, set up payment plans, and opt for paperless billing

**eCheck-In for your appointments**  
Complete some of your pre-appointment paperwork from the comfort of your own home with eCheck-In

**Riverside University HEALTH SYSTEM**

**LOMA LINDA UNIVERSITY HEALTH**

**SAC HEALTHSYSTEM**

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Ver en Español

MyChart Username

Password

**SIGN IN**

[Forgot Username?](#) [Forgot Password?](#)

**New User?**

**SIGN UP**

**PAY**

11:59

Select an Organization  
Where do you receive your healthcare?

🌐 Ruhs Cancel

**Riverside University HEALTH SYSTEM**  
MyChart

11:59

Switch organizations

**Riverside University HEALTH SYSTEM**

Username

Password

**Log in**

[Forgot Password or Username?](#)

Use Face ID

Don't have an account?

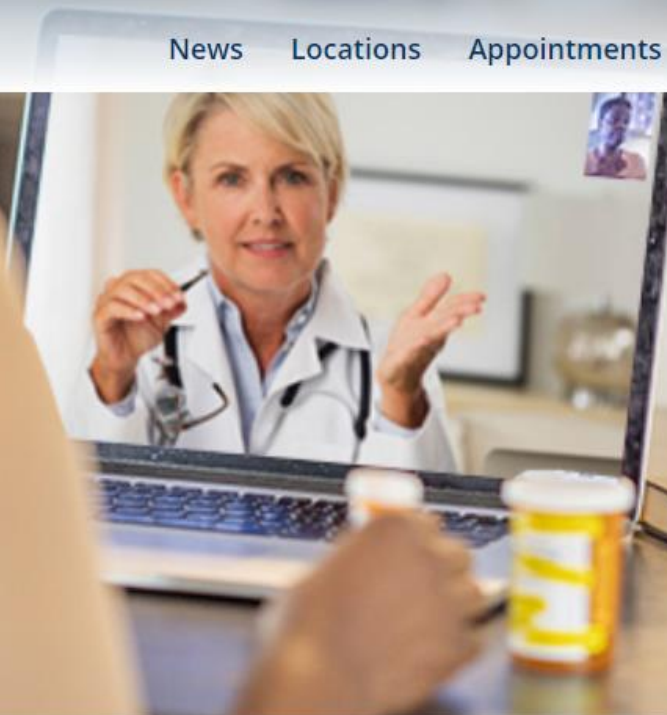
**Sign up now**

q w e r t y u i o p  
a s d f g h j k l



## Virtual Care

Your healthcare provider is ready to see you



### What is Virtual Care (Telehealth)?

Telehealth appointments are virtual visits with your physician via a smart phone, tablet or computer. During the appointment, you will see and hear your physician or specialist and be able to ask questions just as you would at the doctor's office.

Primary and specialty care physicians can provide care and treatment for many conditions via telehealth.

Billing and insurance coverage for telehealth is the same as for an in-person medical appointment. You may be billed your standard co-pay for a visit.

### Video Visit: How To

Develop patient-facing materials to encourage engagement & support staff efforts to activate their patients easily & consistently



**Ask about MyChart and sign up today.**

**Tiene un mensaje nuevo en MyChart.**



Quickly schedule appointments

Programe citas rápidamente



Connect with a doctor no matter where you are

Póngase en contacto con un doctor sin importar dónde se encuentre.



Care for your children and family members

Cuide de sus hijos y otros miembros de la familia

**MyChart - Your digital patient portal**

All your health information in one place

**MyChart - Su conexión segura por internet a su información médica.**

Toda su información médica en un sitio.



[myruhealth.org](https://myruhealth.org)

Develop Scripting for each role in the workflow (front desk, clinic support, providers) to optimize consistency

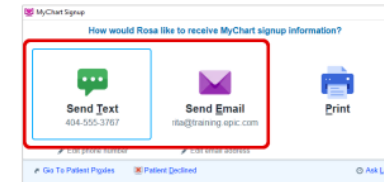
## RUH CLINICS: MyChart Activation Steps for Front Desk

Here are topics that need to be discussed for every patient who has not signed up for MyChart at RUHS.

This is a general MyChart Sign-Up process and can assist signing patients up for the 'COVID Care Companion' (COVID Tracker) or other MyChart features at a later time.

### Instant Activation

Instant Activation can be used at any step in the process: Check-in, Rooming, or Check-out. *Note: if you are unable to use Instant Activation (pictured) then please send an Activation Code as an alternative.*



### Front Desk Staff to Talk About Benefits

- Speaks to MyChart Benefits:  
Tell patient/caregiver...

*'We have a MyChart smart-phone app that allows you to view lab results, send us messages, schedule an appointment, view medications and more.'*

*"Tenemos una aplicación para teléfonos inteligentes que le permite ver resultados de laboratorio, enviarnos mensajes, programar una cita, consultar medicamentos y más..."*

- Evaluate the situation, example: Language used and what type of smart-device the patient has.
- Walk the patient through sign-up before or after the clinic visit. This step can also be completed during the rooming process as needed. *(Note: The provider/physician might send the patient back to the Front Desk in order to complete MyChart activation.)*
- A caregiver can be assigned as a 'proxy' when appropriate. Refer to MyChart Proxy Access tip sheet.  
*(Example: A patient is less than 12 years old, the parent can be assigned 'Proxy' access when making medical decisions for their child.)*



### Contents

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Front Desk Staff to Talk About Benefits .....	1
Rooming Staff .....	2
Physician/Provider...	2

### OUR MISSION


*Improve the health and well-being of our patients and communities through our dedication to exceptional and compassionate care, education, and research.*

### OUR VISION

*Lead the transformation of health care and inspire wellness, in collaboration with our communities, through an integrated delivery network to bring hope and healing to those we serve.*

### OUR VALUES

Teamwork  
Respect  
Integrity  
Excellence  
Discovery



# MyChart Activation

## Key Workflow Recommendations

- **Implement 4-touch workflow approach to signing up patients for MyChart:**
  - *Central Scheduling\**
  - Front Desk Support Staff
  - Clinical Support Staff
  - Providers
- **Activation “gold standards”:**
  - Scheduling/Front Desk → Instant activation link (**maximize**)
  - Clinical Support (during rooming process) → In-Clinic sign-up, Instant activation
  - Provider emphasis during patient encounter → closes the loop by informing patient how MyChart can enhance communication and follow-up; trigger Clinical Support to finalize enrollment via in-clinic sign-up prior to check-out



# Path to Process Improvement: Metrics

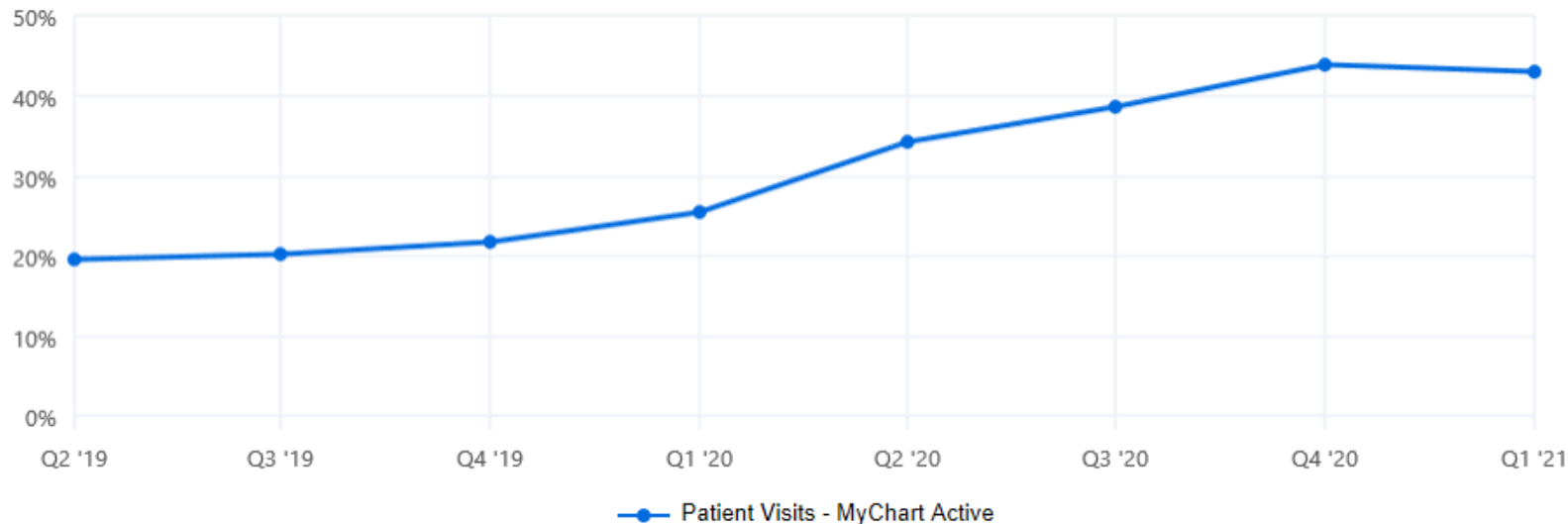
Goal:

All clinics @ 50% by 6/30/2021 (or if >50% increase January baseline by 10%)

## MyChart Utilization

Summary Level:  Service Area:

### MyChart Ambulatory Activation

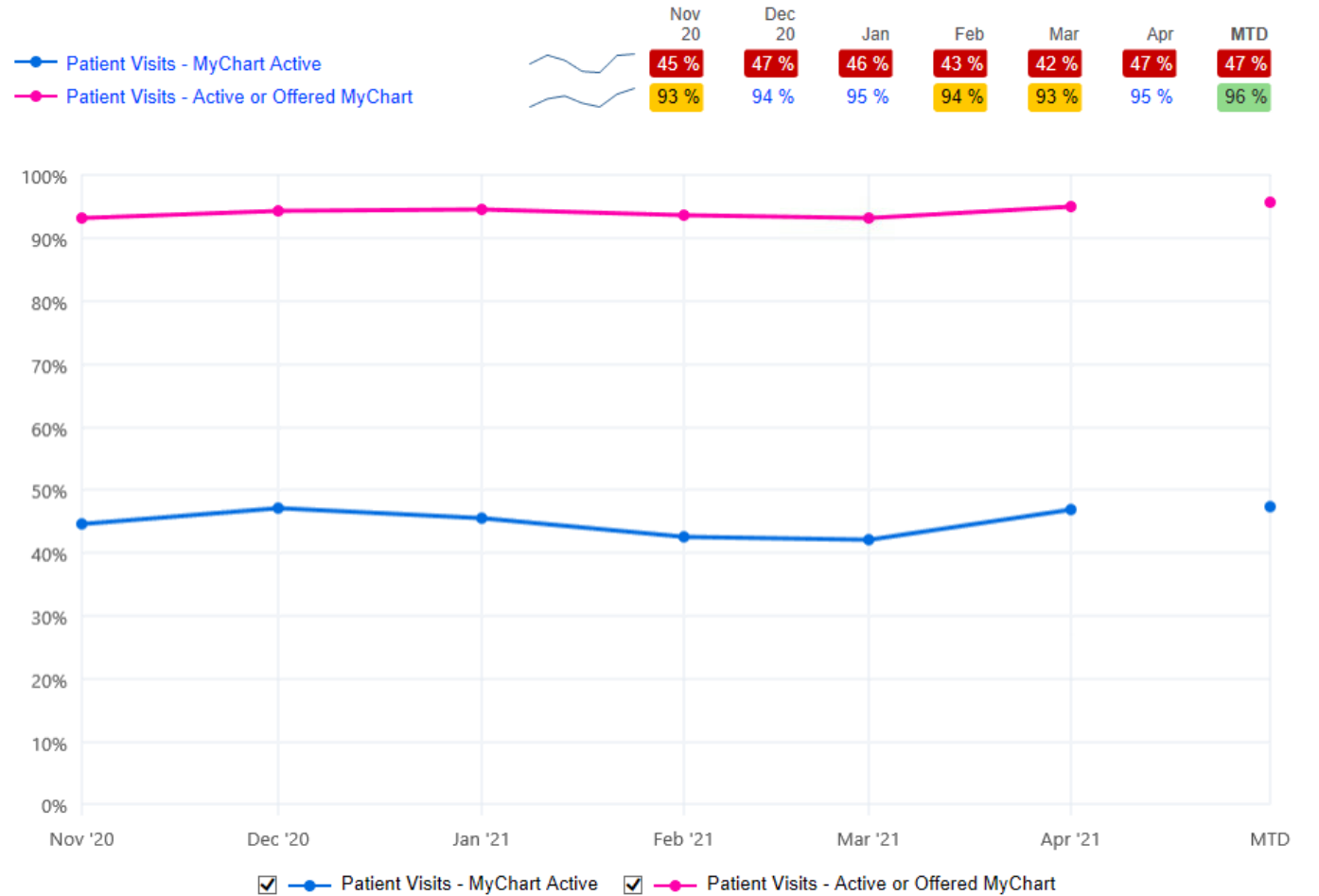


Overall  
RUHS  
MyChart  
Activation  
Rates  
(Ambulatory)

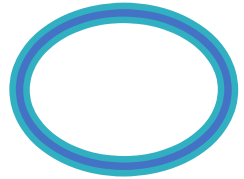
# Path to Process Improvement: Metrics

Goal:  
By June 30, 2021, all clinics offer rate 99% or better

## MyChart Activation Trends



Overall  
RUHS  
MyChart  
Offer Rate  
(Ambulatory)



## Driving Outcomes Next Steps...



- ✓ Partner with key operational stakeholders
- ✓ Establish access for key stakeholders to relevant, valid data
- ✓ Identify key metrics, baselines and set measurable Clinic/Department-specific goals focusing on MyChart Activation and Utilization
- ✓ Align on standard activation workflows using 4-touch approach & best practice activation methods, develop scripting
- Deliver training to Superusers, Nurse Coordinators (functionality, scripting, dashboards)
- Empower superusers and leaders to drive efforts (LEAN – “pull not push”) = Access to meaningful real-time data; embed MyChart performance in the culture of operations
- Clinic-by-clinic deep dives to provide training on activation workflows and functionality
- ✓ Measure and communicate progress regularly

# RUHS Pediatric Clinic Spotlight: MyChart Efforts

Kathleen Lima, DO

Evelyn Garcia

page  
33

# RUHS Pediatrics Clinic

- First intervention

- Rooming staff create instant activation code
- Log in for patient in the room on the computer (locked to other locations/chart)
- Family signs up while waiting for doctor.
- Chose non-WCC visits and not for adolescents
- Was working slowly but then COVID and move.
- Some issues with students/providers coming in before family was done.

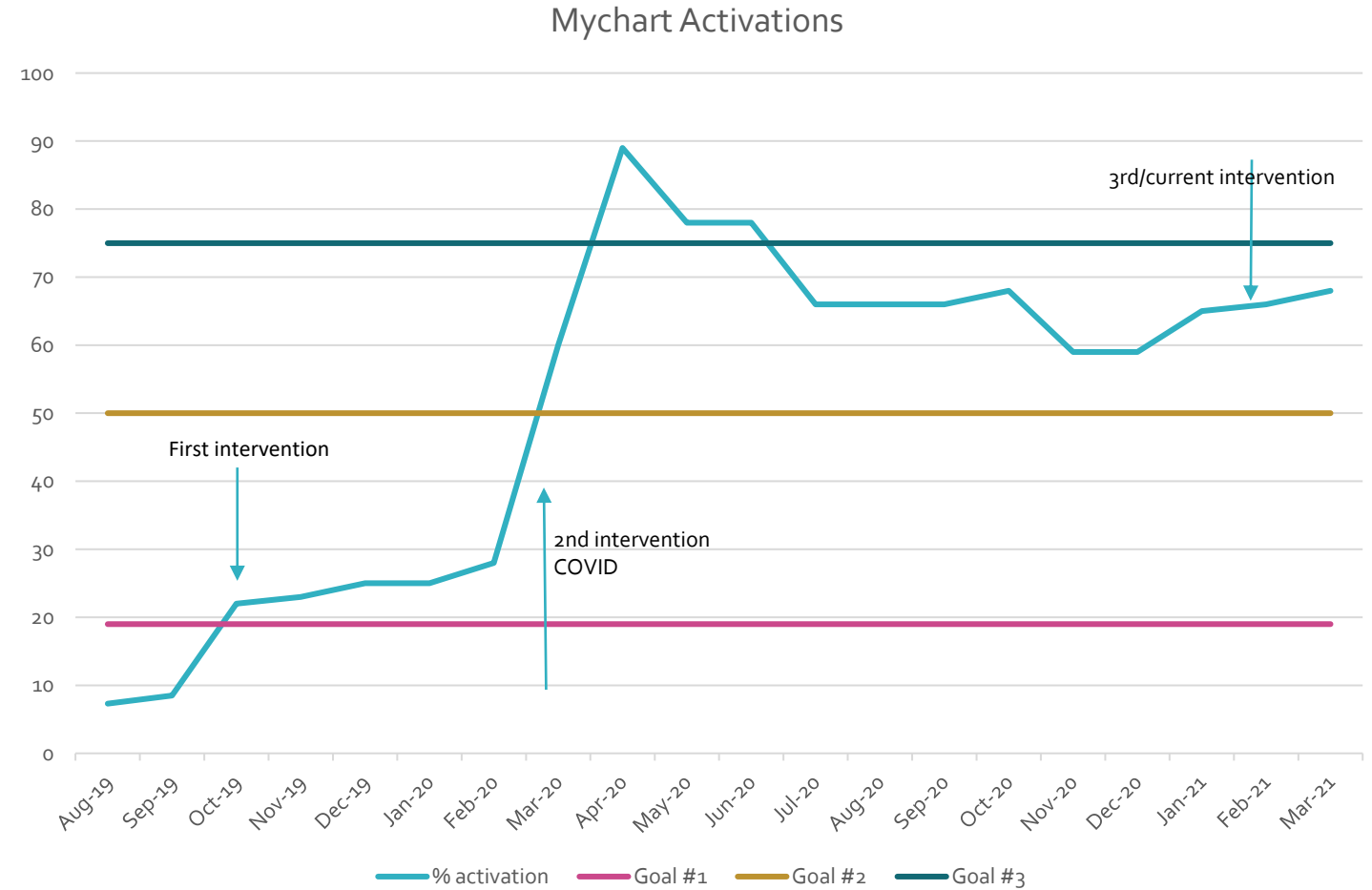
- Second intervention

- COVID!!
- All in for telehealth within Mychart
- Avoided using Zoom or Doximity
- All hands on deck – all staff can generate the code. All staff able to help sign a patient up.
- Often done at the time of the video visit
- Worked VERY well but not sustainable as volume and in person picked up.

- Third intervention

- OA on phones doing reminder calls have a goal to sign up 5 non-activated patients per day.
- This is in progress
- Main issue is teens – need to offer in private to allow them to decline parent proxy.
- Plan for room computer visual cue so the provider asks.

# RUHS Pediatric Clinic: MyChart Activations

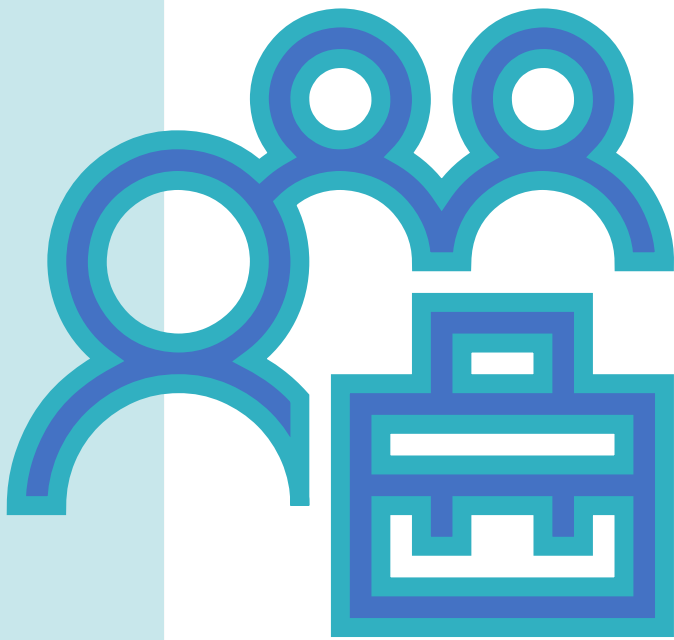


# Balance Measures

- In Basket management
  - More communication to keep up with
  - Need updated policies
- Direct scheduling







1. S. Trent Rosenbloom, MD MPH FACMI, Terrell Smith, MSN RN, SHSMD and Vanderbilt University: A Game Plan for Increasing Patient Portal Enrollment, [https://www.shsmd.org/system/files/media/file/2019/08/Con4\\_Game\\_Plan\\_Increasing\\_Enrollment.pdf](https://www.shsmd.org/system/files/media/file/2019/08/Con4_Game_Plan_Increasing_Enrollment.pdf)
2. Lisa V Grossman, Ruth M Masterson Creber, Natalie C Benda, Drew Wright, David K Vawdrey, Jessica S Ancker, Interventions to increase patient portal use in vulnerable populations: a systematic review, *Journal of the American Medical Informatics Association*, Volume 26, Issue 8-9, August/September 2019, Pages 855–870, <https://doi.org/10.1093/jamia/ocz023>
3. Heather Landy, <https://www.hcinnovationgroup.com/population-health-management/article/13028952/one-health-systems-journey-to-improve-patient-engagement>
4. Dendere R, Slade C, Burton-Jones A, Sullivan C, Staib A, Janda M. Patient Portals Facilitating Engagement With Inpatient Electronic Medical Records: A Systematic Review. *J Med Internet Res*. 2019;21(4):e12779. Published 2019 Apr 11. doi:10.2196/12779

# Wrap-up

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# SNI Link

[safetynetinstitute.org/member-portal/](https://safetynetinstitute.org/member-portal/)

Slides and recording from this session will be posted on SNI Link, our members-only portal.

Check out SNI Link for the latest offerings, learning materials, and member-submitted resources.

## TELEHEALTH



[Click here](#) to access member-submitted telehealth implementation resources.

[Click here](#) to view upcoming webinars on Creating the New Normal in Primary Care.

### Webinars

#### **Understanding and Addressing Digital Disparities. November 9, 12-1PM.**

Leaders from Contra Costa Health Services' Digital Disparities Workgroup discussed early efforts to identify and address disparities in telehealth access and engagement. View our [Webinar Recap](#) of key takeaways from the session. [View Webinar Slides & Recording](#).

#### **Patient Portal Engagement during COVID. October 21, 1-2PM.**

Dr. Jim Meyers shared strategies to improve portal adoption and engagement, including how to leverage COVID-19 to increase patient and staff buy-in. Meyers is a national expert on patient portals and has worked with PHS to increase portal use in the safety net. View our [Webinar Recap](#) of key takeaways from the session. [View Webinar Slides & Recording](#).

- Click here for [Patient Portals: Playbook of Resources](#)

#### **Team-Based Care in a Telehealth Setting. August 19, 12-pm.**

Leaders from San Mateo Medical Center shared their experience developing, testing, and adapting standard work flows for team-based care in ambulatory telehealth settings. Presenters shared

# Tell us how we did

Remember to take the post-event survey that's linked in the chat.  
Let us know what suggestions you have for future content!

