

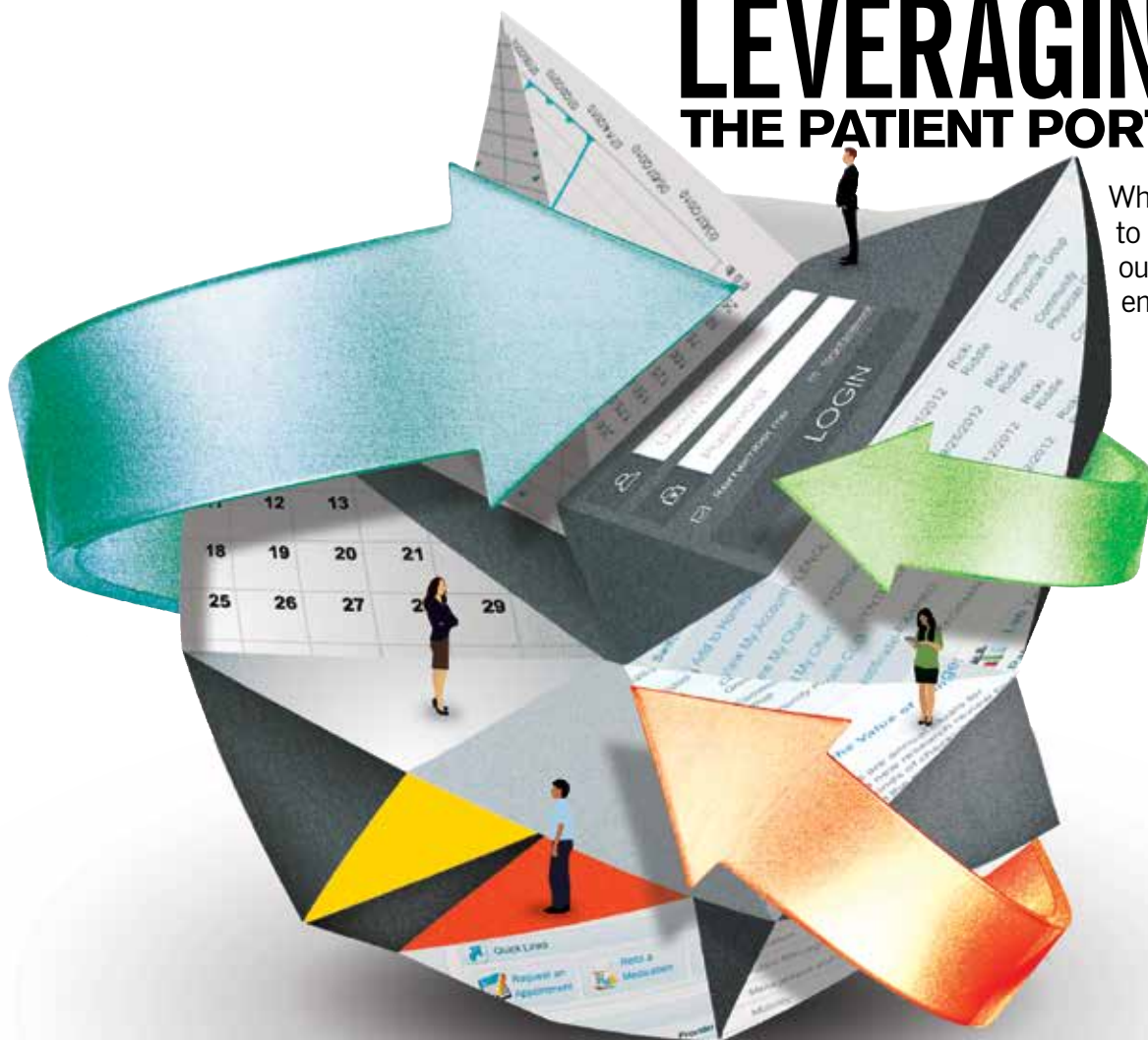


PHYSICIANS PRACTICE

YOUR PRACTICE YOUR WAY

LEVERAGING THE PATIENT PORTAL

Why practices need to get the most out of this patient engagement tool





When you deliver the control and convenience your patients want, it benefits the needs of your practice.

BY CHRISTINA SCANNAPIEGO

GIVING CONVENIENCE THROUGH THE PATIENT PORTAL

Imagine you're getting ready to take a well-deserved vacation over the holidays, dreading the impending experience at the airport, which you expect to be a zoo. What is your first step to making the process as painless as possible? Easy — you check in online. This is exactly the way you want your patients to view your patient portal. Consumers like to feel self-sufficient. They shop online, check themselves out in the grocery store — so why should your patients approach their own healthcare any differently?

Joseph Smith a cardiologist and chief science and medical officer at the Gary and Mary West Health Institute, stated in a recent [blog](#): “If our healthcare system were to implement the automation, connection and coordination that other industries have used to change the face of consumer engagement, boosting patient engagement wouldn't be an issue. We would instead be easing the burdens on the very patients we are trying to help.”

A state-of-the-art patient portal that will serve your patients and make your practice more efficient at the same time should include a sophisticated check-in feature. With a good online check-in

feature, your staff will no longer need to retype the many pages of paper forms that patients traditionally filled out at the office.

The check-in feature for your patient portal should be completely customizable and allow you to select which pages or forms your patients can access in the check-in process, including editable PDFs. Any updates to a patient's family, medical, surgical or social history as well as immunizations should be automatically added to the patient's encounter summary in the EHR.

In these types of portals, patients can complete all of their forms conveniently from anywhere they choose, on any computer, their smartphone or tablet. As you might surmise, the online check in feature greatly decreases waiting time and receptionist time used to check patients in and congestion in the waiting room. Some point out that moving patients through the waiting room quicker also reduces their risk of picking up infections, even if it plays but a minor contribution to the overall health of their patients.

Ultimately, with patient portal features like the check in, your patients will feel more empowered in their healthcare. They also will appreciate the time-shifting you're allowing them.

Just like you, your patients are busy. Everybody is pressed for time. In many cases, your office hours are their office hours, and requiring them to spend more time filling out forms in your waiting room causes added stress or inconvenience. Giving your patients the freedom and control to prepare for their appointment in their down time can only benefit both parties.

The trend of empowering patients through technology is only gaining momentum. The number of physicians providing their patients with access to view, download or transmit their EHR is greatly increasing, as pointed out in a [recent article](#) compiled by HealthIT.gov highlighting the reality that the majority of providers are now granting online access to health information. The same article shows that 81 percent of those who accessed their health information online found it useful and more than half of individuals who were offered access viewed their health record within the past year. ■

Christina Scannapiego is the Content Marketing Manager at HealthFusion. Christina has been a healthcare marketer for several years, and a lifestyle, sports and wellness editor and journalist for more than 10 years.



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FIVE REASONS YOUR PATIENTS WANT TO USE A PATIENT PORTAL

For many reasons, patients would be willing to use an online portal your practice can offer them. Here are five that stand out in particular.

BY CHRISTINA SCANNAPIEGO

A 2014 report on [How Consumers Value and Use Health IT](#) conducted by National Partnership for Women & Families states that six in 10 individuals with online access say it improves their desire to do something about their health. Consumers look for these major attributes in their healthcare: control, convenience, transparency, communication, and mobility. Giving your patients access to their health records as well as more online control over their own health care via a patient portal that is at the same time easy to navigate, robust and versatile empowers them — and motivates them — to participate more actively in their health.

Here are five features that will entice your patients to adopt a patient portal and stay engaged.

1. Patients want to use an online payment feature. Your patients may pay their bills, balance their checkbooks, and do most of their banking online. Seniors have proven to be digitally savvy in their everyday lives, especially when it comes to healthcare. A data brief from the Office of the National Coordinator for Health IT (ONC) published in June 2015 showed that 67 percent of

U.S. adults age 65 and over say that accessing their medical information online is important.

A comprehensive payment history function with detailed statement views makes it easy for patients to see, at a glance, what items they have paid and what may still be outstanding, eradicating any frustrating ambiguity. A 2014 study by Intuit found that 77 percent of patients would be willing to pay medical bills online if possible.

2. Scheduling. According to a survey conducted by Software Advice, “Scheduling appointments,” was the number one factor motivating patients to use a patient portal. Online appointment scheduling is typically the most requested patient portal feature, making the process of reviewing physician availability and getting an appointment on the books much easier for both parties.

3. Requesting refills and checking prescriptions. This is one of the most significant ways in which a patient portal supports interaction between patients and your practice that is invaluable to those in your care. A 2014 study in *Medical Care* showed that patients with diabetes who used an online patient portal to refill medications

actually increased their medical adherence and improved their cholesterol levels.

4. The ability to view test and lab results: When Kaiser Permanente added a feature to its portal allowing patients to view their test results, registration increased from 9 percent to 27 percent. Patients should be able to view their test and lab results, as well as review all of their information and history to make sure all data is correct. This feature represents the perfect compromise — you can choose how much information your patients will see and your patients can feel at ease, with all of their pertinent information viewable at their fingertips.

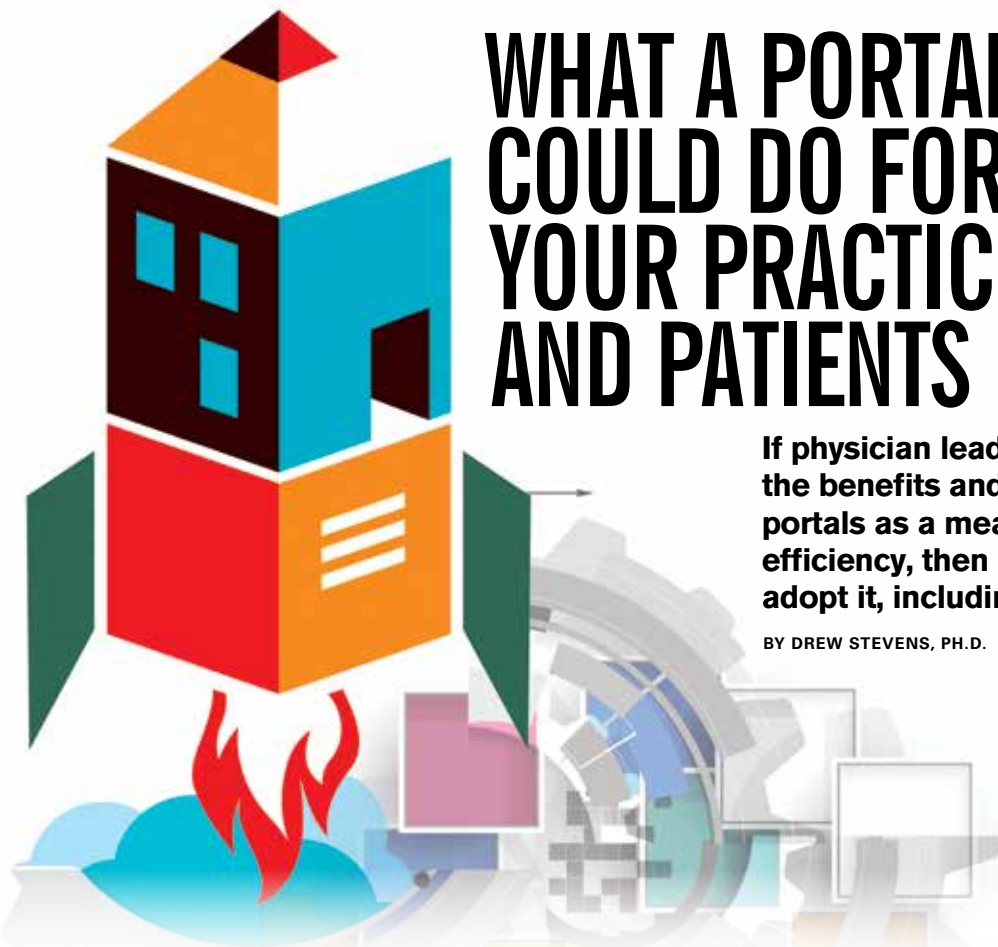
5. Secure messaging. In addition to many other features, secure electronic messaging also offers an additional channel for communication and studies have shown that most patients indicate an interest in communicating directly with their healthcare providers online. ■

Christina Scannapiego is the Content Marketing Manager at HealthFusion. Christina has been a healthcare marketer for several years, and a lifestyle and wellness editor and journalist for more than 10 years.

WHAT A PORTAL COULD DO FOR YOUR PRACTICE AND PATIENTS

If physician leaders explain the benefits and uses of patient portals as a means of better efficiency, then all will quickly adopt it, including staff.

BY DREW STEVENS, PH.D.



In the age of technology, everyone, including patients, is seeking faster alternatives to communicate. With a wealth of social media, blogs, websites, and video there is a barrage of information. To that end, patients seek easier means to communicate with physicians and their staff. It appears with doctors' offices busier and visitation gaps longer, patients desire easier ways to connect with doctors about their health — enter the patient portal.

Patient portals enable patients to schedule appointments online, e-mail doctors about prescriptions or issues in health, gain valuable information in the form of a newsletter, view health information, and so on.

In addition to providing convenience and access to patients, patient portals boost patient engage-

ment because they provide patients with a means of self-managed care.

According to research from the Pew Research Center, 35 percent of U.S. adults have gone online to figure out a medical condition; of these, half followed up with a visit to a medical professional. And, according to the Pew Internet Project, 63 percent of adult cell phone owners now use their phones to go online, a figure that has doubled since 2009. In addition, 34 percent of these Internet users say that most of their online use is via cell phone.

With this type of usage, more patients will begin using their phones to attempt to access your patient portal. Make sure your portal is mobile friendly.

Portals also bring significant benefits to practices. Call volumes might decrease with the plethora of data instantly avail-

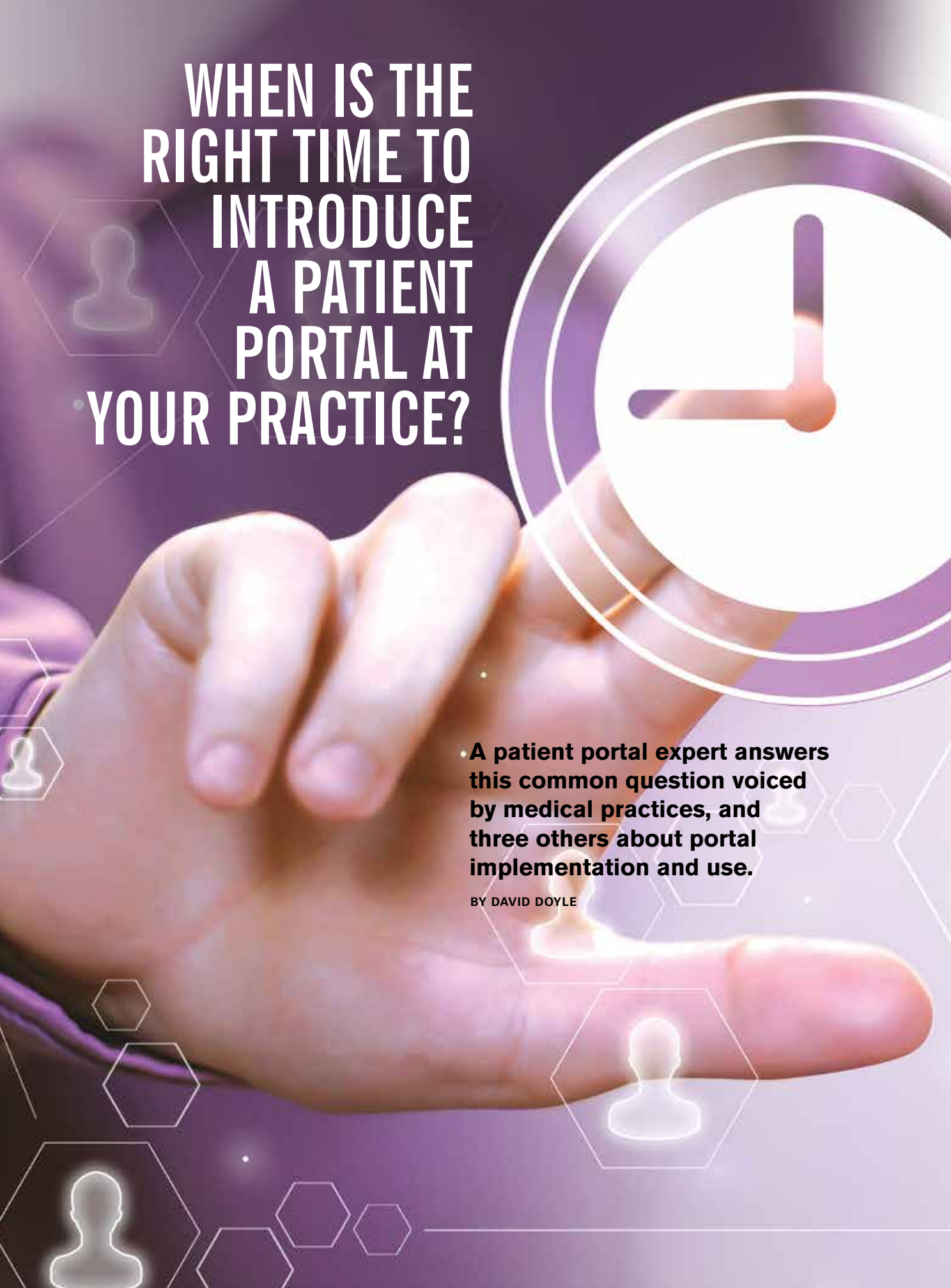
able on the portal. Further, these new electronic means actually diminish work flow, paper, and time lags, allowing both the doctor and staff to attend to other important tasks.

As conducive as portals can be, there can be some limitations if staff, physicians, and patients are not fully on board.

If physician leaders explain the benefits and uses of the technology as a means of better efficiency, then all will quickly adopt it, including staff. Discover today what a portal might do for your practice. ■

Drew Stevens, PhD, is the author of *Practice Acceleration* and over 700 articles on healthcare practice strategy. He developed the *Practice Management Certificate* at Saint Louis University in Missouri. For additional information call him at 877-391-6821.

WHEN IS THE RIGHT TIME TO INTRODUCE A PATIENT PORTAL AT YOUR PRACTICE?

A hand is shown pointing towards a large clock icon in the upper right corner. The background is a dark purple with various white hexagonal icons, some of which are person silhouettes. The overall theme is digital healthcare and patient portals.

• **A patient portal expert answers this common question voiced by medical practices, and three others about portal implementation and use.**

BY DAVID DOYLE

A 2012 study conducted by Accenture found that 90 percent of patients want to access their medical information online, but 46 percent don't know if they're able to do so. Many healthcare providers are now using patient portals to move patient communication online without compromising patient privacy or care.

Here are answers to some of the common questions voiced by practices that have not yet introduced or implemented a patient portal:

How are patient portals currently being used in practices?

They are used by both patients and physicians. Patients can perform a number of tasks related to self-managing their healthcare, but the full range of options depends on the specific portal that a practice adopts. Generally, portals allow patients to request appointments and prescriptions/referrals; view and pay their medical bills; view lab and test results from recent visits; ask physicians general or personal health questions.

Portals also enable physicians to respond to inquiries more quickly. DoctorBase CMO Zachary Landman, for instance, implemented patient portals in 12,000 practices and after integrating the system into the daily work flow at the practices, physicians' patient response time dropped from 12 to 14 hours to just two hours.

Can patient portals improve overall patient care?

A 2013 study appearing in the *Journal of the American Medical Informatics Association* shares the results of a review of 32 evaluation studies of patient portals, dating back to 2003. It concludes that the use of most patient portals led to improvements in clinical outcomes,

patient behavior, and experiences. Researchers evaluated 18 randomized clinical trials and saw positive effects in 15 of them, with no serious adverse consequences from patient portal implementation.

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Do patient demographics play a role in determining how quickly you should introduce a patient portal into your practice?

Not necessarily. For example, Kaiser Permanente's portal, My Health Manager, has 3 million members. While the age range of its users is 13 to 95, most fall between the ages of 40 and 60. Roughly 60 percent of the members are female, almost half of all enrollees don't have a college degree, and half have annual incomes under \$75,000.

Another patient portal called PatientSite, which is used at a Boston teaching hospital, found that its enrollees were more likely than non-enrollees to be white and less likely to be on Medicare or Medicaid. And most of the users of myGeisinger, the patient portal for

Geisinger Health System in Pennsylvania, could be categorized into one of three groups: young parents, family members caring for elderly parents, and patients with chronic illnesses.

While younger patients are more likely to register for a patient portal, elderly patients are not averse to using this type of resource once they understand the benefits of doing so. And neither are patients with lower incomes or less education.

When is the right time to implement a portal?

The largest determining factor in ensuring patient usage is the reliability of physician communication. Physicians who don't buy into the need for a new patient portal probably won't see the need to make any changes in the speed or quality of their patient communications either, which will likely cause their patients to stop using the portal altogether. Therefore, it's important that practice managers ensure physician engagement.

To increase physician engagement, get them involved when you're evaluating potential vendors — just to make sure the doctors feel comfortable using the chosen portal. Consider offering incentives for those physicians who devote time each day to check for patient messages in the portal.

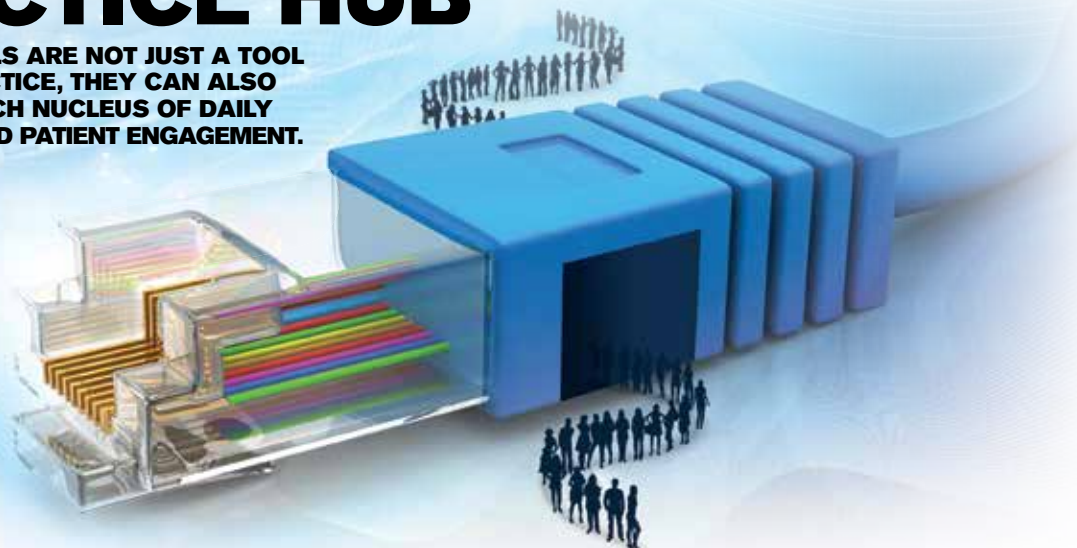
Practices with stubborn physicians who refuse to use the portal can instead direct their portal communications to other members of the staff. Staff members can then sit down with these physicians at a set time each day to address any patient messages and input a response on the physicians' behalf.

In short, the best time to introduce a patient portal to your practice is after you've put a system in place to ensure physician engagement. ■

MAKE THE PATIENT PORTAL YOUR PRACTICE HUB

PATIENT PORTALS ARE NOT JUST A TOOL FOR YOUR PRACTICE, THEY CAN ALSO BE THE HIGH-TECH NUCLEUS OF DAILY OPERATIONS AND PATIENT ENGAGEMENT.

BY AINE CRYTS



There's no way around it. Practices have little choice but to invest in patient portals — that is, if they plan to achieve meaningful use. Meaningful use rules require that a percentage of your patient population use some kind of patient portal to view, download, and transmit their health information.

“There are two ways of achieving meaningful use ... by trying to meet the letter of the law or the intent of the law,” said Shane Pilcher, vice president at Bethel Park, Penn.-based Stoltenberg Consulting. “What that means is you can just check the box, or you can try to get to the place where you're engaging with patients in a meaningful way. The patient portal has to be more than just a place patients get their data. That information has to be in layman's terms, in plain English. Patients have to understand how this information has an important effect on their lives.”

First, of course, you need to get your patients signed up to

access the patient portal. Morris Stemp, CEO at Long Island City, NY-based Stemp Systems, a healthcare IT consulting firm, works with a practice that has integrated patient portal sign up as part of the patient experience. After appointments, patients can use a kiosk right there in the office to sign up. The benefit for patients is they won't have to bring home loads of papers, plus they'll have access to all of their medical information online.

Beyond providing patients with access to their medical information, patient portals should include functionality that will continue to pull them back to engage with the platform. One way to keep your patients coming back to the portal is by sending them notifications specific to their health issues, Pilcher said. For example, using the patient portal to send notifications to a 50-year-old male who smokes five packs of cigarettes a day that he should schedule a colonoscopy or a follow-up appointment can be helpful.

Also important to keep in mind, according to Pilcher, is the need to

provide patients' family members with proxy access to their loved one's records via the portal — that's the case whether it's a parent who wants access to their child's records or an adult child who wants access to their elderly parent's medical information. “While this is a vital need, it's not a simple process,” he said. “There are many statewide age-specific rights that govern what healthcare information a parent or guardian has a right to and what privacy expectations a child has.”

He recommended that practices work closely with care providers, legal counsel, and privacy officers to ensure policies allowing proxy access to patient information conform to state and federal law.

Joncé Smith, vice president of revenue management at Stoltenberg Consulting, recommended providing prices for various procedures on the patient portal, which treats patients like they're actually consumers.

“It's very important to use the patient portal as an education point for payment, times of service, and total cost,” said Smith. ■

TIPS FOR PATIENT PORTAL OPTIMIZATION

FOUR WAYS YOUR PATIENT PORTAL SHOULD SAVE YOU TIME AND MONEY

BY CHRISTINA SCANNAPIEGO

As sophisticated patient portals should become an essential part of your workflow. When it's optimized and used as a seamlessly integrated tool, it will improve the quality of care and enhance efficiency and revenue. Your patient portal is *the* patient interface of your EHR, empowering parents to become true partners in their healthcare. When your practice utilizes a patient portal, patients and their families take on the responsibility of managing the patient's information, enabling them to be a well-informed, active participant — while cutting down on mundane tasks for you and your staff to perform. The easy interaction with your practice via portal eradicates many phone calls, allows you to meet current meaningful use requirements, and will help your practice achieve positive outcomes with your patients in the future, as we continue to transition into patient-centered care.

Optimize these four main components of a sophisticated patient portal and you'll find time to see more patients with fewer costs, and free up your staff for more imperative duties.

1. PAYMENT

- Online bill pay functions replace paper statements. Payments are received faster and cost less to process — reducing postage, paper use, and printing. With statement views, patients can find in their portal

display the same level of detail listed in paper statements.

- The patient or patient's family member enters all patient information, payment methods and insurance, rather than providers and staff members, freeing up a significant amount of time for other duties. A payment history feature is useful when compiling receipts for flex spending accounts.

2. SCHEDULING

- The option to give patients access to certain time blocks that are open for appointments and request appointments online eliminates the time staff spends fielding requests via back-and-forth phone calls.

3. CHECK-IN

- The wait time in doctor's offices averaged 21 minutes last year, a 6 percent increase in wait time from the year before. Family members, guardians, and patients can check in online prior to the appointment, on their smartphone while they're waiting, or a tablet provided by the practice (if your practice chooses to provide waiting room tablets for your patients) minimizing time spent in waiting rooms.
- 1990 called, it wants its paper forms back. Today, patients and family members can enter patient data via the portal. No more data entry duties on your end, delayed appointments and unnecessary errors. Information is easily updated.

4. INTERACTION

- When you use secure messaging, the time spent messaging greatly cuts down on the time your practice spends processing and routing phone calls.
- Patients should be able to request medication refills via the portal, cutting down on phone calls.
- An immunizations module aligns with CDC Child and Adult Immunization Records. Patients and family members can print their own copies, saving staff time, ink and helping to eradicate office "bottlenecks."
- Patients can review their test results online, after you've reviewed them and provided any necessary instructions or guidance in interpreting results.
- Virtual office visits for non-urgent care or follow-up treatments via chat and computer-based, video-conferencing eliminates inconvenient travel time.

The patient portal software that you choose for your practice should possess the agility and sophistication to perform all of the functions listed here. This standard of technology is your key to providing the happy medium between patient empowerment and physician supervision. ■

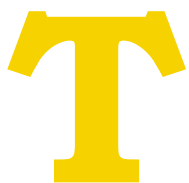
Christina Scannapiego is the Content Marketing Manager at HealthFusion. Christina has been a healthcare marketer for several years, and a lifestyle, sports and wellness editor and journalist for more than 10 years.

PATIENT PRIVACY **IN THE AGE OF** **THE PATIENT** **PORTAL**

Patient portal use can bring up tricky privacy situations for practices to adhere to. Here are some things they should know.

BY SETH FLAM, DO





here are times that data on a patient portal should be hidden. Let's take the case of a young female adolescent

patient that has traditionally shared portal and EHR access with her parents at their insistence. This adolescent female has just become sexually active, she wants counseling regarding avoiding STDs and she has decided to begin using the birth control pill. Breaching her confidentiality could ultimately cause her to forgo her care. So, how do you negotiate between her privacy and the use of an EHR?

Or, consider a care plan for an overweight uncontrolled diabetic patient. A physician may be accustomed to writing notes like: "I keep telling the patient that they are too heavy and they will never get their sugars under control if they don't lose weight."

We all know that the provider can easily accomplish the same type of documentation by stating: "We discussed the patient's elevated BMI and the ways that impacts their blood sugar and the impact of their BMI on their overall health."

Except for certain mental health issues where the patient's emotional state is very fragile and a few other exceptions, the overwhelming majority of office-based chart notes should be able to reflect the honest and forthright communication that ought to occur during the encounter.

Patient privacy issues and limits remain one of the most complicated matters to date. Privacy requirements can vary by age and location, and permission levels vary according to clinical role or family relationships. Providers need a sophisticated EHR and patient portal with nuanced, flexible and granular functionality, to deal with this issue. The key is to find an EHR system that provides a versatile privacy infrastructure with controls that allow for appropriate access, de-

pending on any of the variables mentioned above.

The *Journal of Adolescent Health* (2014) presented some specific recommendations for the ways in which EHRs should address the issue of patient privacy rights when dealing with young adults:

"The American Academy of Pediatrics [AAP] has recently described the lack of current EHR standards to protect adolescent health information in their position statement (endorsed by the Society for Adolescent Health and Medicine) [14]. The Society for Adolescent Health and Medicine has previously affirmed that 'confidentiality protection is an essential component of adolescent health care.' Privacy is good care and a right for all patients. Adolescents may forgo health care if they do not perceive that health care providers will keep their private information private, especially for reproductive health, mental health, and substance abuse concerns. The desire for increased transparency and electronic access to health information should be counter-balanced by privacy protections to ensure access to appropriate confidential care for all patients, especially vulnerable adolescents."

They further commented about what type of solution EHRs should provide:

"Recommendations for vendors/electronic health record system requirements: EHR systems have largely been designed to facilitate sharing of information within a clinical system and not usually to restrict the flow of that information ... EHRs should have the functionality to designate problems, medications, visit notes, laboratory and radiology results, genetic testing, and social and family history as confidential, so that these can be easily suppressed ..."

In the case of pediatrics, an EHR should be able to support meaningful use objectives and maintain the confidentiality of an adolescent or young adult. An

ideal EHR will default to stringent privacy settings according to state law compliance — and there are times that data on a patient portal should be hidden, as the AAP posited, regarding reproductive health, choices in care, mental health, or drug use. A system should facilitate the sharing of most every medical record, with the ability to allow for selective "hiding" of certain data in these types of complex circumstances, because different individuals will need or have a right to different levels of access, depending on each individual's relationship to the patient in question.

Portal privacy is not just an issue for young adults. Older patients may also share their login credentials with their children. They may not want to share certain information related to social issues with their children. For example: Sometimes a patient's children may be contributing to an anxiety disorder. Hiding certain encounters or medications related to that disorder could be perfectly appropriate.

Patient engagement is happening. Meaningful use has mandated patient engagement, and even if the future of those requirements are in flux, they are still applicable now. Long-term patient engagement features on patient portals enhance the model in which patients and clinicians work in a partnership toward the common goal of improved health, and it will become the norm. We must empower physicians to make more granular decisions about how patient medical records are shared; this capability is key to making the adoption of portals grow. ■

Seth Flam is one of the founders of HealthFusion and serves as the company's CEO and President. He is board certified in Family Practice and is one of the creative forces behind MediTouch EHR. More information about Dr. Flam can be found at www.SethFlam.com



FIVE WAYS TO GET MORE OUT OF YOUR PATIENT PORTAL

As portals become more common, physicians should find ways to maximize their value and encourage patient use. Here are five ideas.

BY RON VATALARO

In order to qualify for Stage 2 of the government's EHR incentive program, physicians and hospitals are required to have a percentage of their patients accessing their medical records online. Many will accomplish this requirement through patient portals.

A patient portal is an innovative asset to any practice. It's an efficient way to provide secure online access to patient health records, as well as to interact and follow up with patients, set appointments, and deliver lab results.

Patient portals can save practices significant time and money. They're also great for patients since they facilitate online appointment check in, bill paying, submission of routine questions, and prescription refill requests. However, despite patient demand for online access to their health records, many physicians have experienced difficulties in getting patients to actually adopt and use the portals.

PATIENTS ARE OFTEN UNAWARE OF PATIENT PORTALS

The problem is often a lack of awareness. A recent survey by Technology Advice shows that many patients simply do not know whether their physician even offers a patient portal. The survey also revealed that while patients of all ages prefer to be contacted and to receive lab results through a phone call, younger people are more likely than older to schedule appointments online.

A surprising insight was that nearly half (48 percent) of physicians did not follow up with patients after a visit; of those who did, a phone call was more common than an online portal (23 percent vs. 9 percent).

Physicians could be missing opportunities to better engage patients and meet the requirements for meaningful use. Edu-

cating patients takes some time and effort, but can really pay off with increased awareness and patient portal use.

FIVE WAYS TO MAXIMIZE YOUR PATIENT PORTAL

As portals become more common, physicians should find ways to maximize their value and encourage patients to embrace it. Here are five ideas to make a patient portal more useful.

1. Create a comprehensive symptom survey. A detailed symptom survey can provide physicians with a snapshot about a patient's most pressing health concerns, from neurological issues and weight gain to sensitive issues, such as depression. Putting a survey online offers benefits, such as a greater degree of comfort. Patients often prefer to complete these surveys on their own time, in familiar surroundings, rather than in a waiting room. Patients will also feel more inclined to divulge important health information that they would deem to be otherwise too embarrassing or unimportant to include in a paper form.

2. Allow for post-treatment feedback. Encouraging feedback after treatment gives patients the feeling that the patient portal is set up for their benefit. Simple, customized surveys can gather "yes," "no," and more detailed answers to questions about improvements and progress (or declines) in a patient's condition. Patients who have undergone invasive procedures can express their satisfaction (or dissatisfaction) with the results of the surgery, and all patients can share their feelings about their overall experience.

3. Curb patient anxiety. Most patients prefer to receive lab and test results through phone calls. However, the ability to review them later through the patient portal can be reassuring. Patients

can set aside their emotions, take all the time needed to read through their results, ensure they correctly heard the details, and process the information.

4. Engage your vendor. Most EHR vendors are well versed in patient engagement. Consider each vendor or potential vendor to be a valuable partner; its job is to help practices and patients get the most out of the entire EHR system, including the patient portal.

5. Invest in educating patients. Introduce patients and family members to the portal while they are still in the office. Designate a patient educator: a knowledgeable staff member who can assist in setting up accounts, logging in, and navigating through the features. When patients are comfortable accessing the portal in your office, they're much more likely to continue using it on their own.

PATIENT PORTALS WILL BECOME ROUTINE

Technology has made it easier for consumers to do their shopping, banking, and social networking online. But there is still a user gap when it comes to accessing patient information from hospitals and physicians.

Much like consumer demand led to the rise in e-commerce, patient demand can inspire more physicians to offer online patient portals and get engaged in eHealth. Getting patients to use them will require efforts to provide value and educate patients, but as their use spreads, patient portals will become routine for every healthy lifestyle. ■

Ron Vatalaro is a writer at Bisk Education with the University of South Florida Morsani College of Medicine and writes about health informatics. Ron holds an advanced degree in business administration with a concentration in technology.



Patient Communication Preferences

What you communicate to patients should also consider how you reach them. And with the variety of messaging available, there is also varying patient preference.

BY JOANNA HAUGEN

Vital in Care Compliance

Despite the emphasis in creating apps and communicating with patients via text message, a quarter of patients want their doctor to contact them via e-mail, and nearly 43 percent would prefer to be reached via a phone call, according to a recent FICO report on mobile technology.

Asking patients about their preferred method of communication is simple but important in getting patients to follow through on the messaging, said healthcare consultant Marcia Tourtellott, who presented “Using Technology to Drive Patient Action” at the [2014 Medical Group Management Association Conference](#).

“If I communicate with you in a channel you prefer, it’s going to be more effective,” she said.

ACCOMMODATING THE PATIENT

With the proliferation of digital communication, there are myriad ways to communicate with patients today including text message, app-initiated reminders, e-mail, and secure messaging. Patient portals are becoming increasingly popular, but some people still prefer the classic phone call or mailed letter for communication. The best practice in determining how to communicate with patients is to ask them each time they check-in, verify their contact information, and capture any consent needed to utilize those channels.

Tourtellott pointed out that, in addition to capturing the preferred communication method, knowing other personal preferences can also help ensure compliance or response on behalf of the patient. For example, medical practice staff should note the ideal time for communication, if there are reminder preferences and preferred language of communi-

cation. “This helps you be more personal in your messaging so it’s more effective,” Tourtellott said.

ONE TOUCH POINT, ONE GOAL, ONE ACTION

“As a society, we tend to try to put a lot of information in one message, and that’s not very effective,” Tourtellott said. During her presentation, she used the example of sending a reminder

PATIENT PORTALS ARE BECOMING INCREASINGLY POPULAR, BUT SOME PEOPLE STILL PREFER THE CLASSIC PHONE CALL OR MAILED LETTER FOR COMMUNICATION. THE BEST PRACTICE IN DETERMINING HOW TO COMMUNICATE WITH PATIENTS IS TO ASK THEM EACH TIME THEY CHECK-IN, VERIFY THEIR CONTACT INFORMATION, AND CAPTURE ANY CONSENT NEEDED TO UTILIZE THOSE CHANNELS.

to get a flu shot. There’s a tendency to provide too much information—what the flu is, why the flu shot is important, where it can be received, etc.—when the patient communication should simply state one clear message: Get a flu shot.

Effective reminders move patients to action, she noted. The message should state a clear goal

timely to the action desired. It should be easy for the patient to take action and delivered via the preferred communication platform. Additionally, the content should be direct and to the point, and be stated at an appropriate health literacy level, in the preferred language, and actionable.

Tourtellott also noted that if you want a patient to take action, this is not an appropriate time to provide educational material as well.

CHOOSING THE RIGHT TECHNOLOGY

Though patients may have preferred forms of communication, Tourtellott pointed out there isn’t a one-size-fits-all approach in relaying information. Depending on the audience and objective of the communication, consider using different methods. “Ask yourself: ‘What is best suited for the audience and what I want to accomplish?’” she suggested.

Automated voice calls tend to work well for reminders and to capture data, and older patients generally respond well to this particular method. E-mail is good for reminders, detailed instructions, and information that should be saved such as test results. Established patient portals are a good place to store more informational and educational materials as well as videos for reference. The patient portal may also be a good place to store laboratory and procedure results, which can be revisited by the patient at their convenience.

Though there is a move to use more text messaging in communication, Tourtellott notes this method is particularly effective when communicating with younger and low income patients, and if there is a need to communicate specific directions or timely actions. This population is more likely to have access to text-enabled phones as opposed to the Internet to consistently access health information. ■

HOW TO MAKE THE MOST OF YOUR PRACTICE'S PATIENT PORTAL



HOW TO SELECT, IMPLEMENT, AND MARKET A PORTAL THAT WILL APPEAL TO YOUR PATIENTS.

BY AUBREY WESTGATE

With so many challenges facing practices, from declining reimbursement to reform initiatives to the meaningful use incentive program, it's understandable that many of you are hesitant to implement a patient portal. But practices that have taken the plunge say the time and money spent implementing the new technology leads to big payoffs — and quickly.

“Basically it frees my staff up so they can work on other things; so they can be more attentive to referrals, and prior authoriza-

tions, and appointments; and pretty soon we're going to engage the functionality that allows the patients to schedule some appointments online,” says solo family physician Christine Smith, who recently implemented her portal. “It just kind of streamlines things so [patients] can take care of some of the more usual things on their own.”

Smith, of Baton Rouge, La., estimates that about 20 percent of her patients are already using the portal, which enables them to request prescription refills, exchange secure messages with her and three staff members, view

test and lab results, and more. In addition to saving her time, Smith says the portal is improving patient engagement, and helping her satisfy the meaningful use requirements for the government's EHR incentive program.

While Smith has had great success with her portal, not all practices that implement them experience such positive results. Part of the reason: Unlike many other initiatives that practices take on, such as EHR implementations or recognition as patient-centered medical homes, successful portal implementations require not only staff and physician engagement,

but patient engagement. A practice might have the best portal in the world, but if its patients don't use it, it's going to be of little use.

For that reason, medical practice technology experts and consultants, as well as practice managers and physicians that have successfully implemented portals, say practices must keep patients' perspectives in mind throughout the portal selection, implementation, and marketing process. Here's more on the various considerations practices should take to ensure they are making the most of their patient portals.

DEFINE YOUR NEEDS

Once your practice decides that it's time to implement a patient portal, take your time to define your portal expectations and requirements prior to shopping around, says reproductive endocrinologist and OB/GYN Robert Wah, chief medical officer at CSC, a health information technology services and solutions company. Practices that fail to define their expectations in advance often get lured in by products that look great initially, but ultimately fail to meet their needs, says Wah, who is also president of the AMA.

Some of the key features to look for in a portal include the ability to:

- Upload medication lists, problem lists, immunization lists, and lab and test results;
- Exchange secure messages with patients;
- Offer and respond to prescription refill requests;
- Provide online statements and bill pay capabilities; and
- Enable patients to request or schedule appointments.

When outlining your portal needs, consider what features will likely attract patients to the portal. The more attractive the features are to patients, the more

likely they are to use it. Stephen Snyder, president of MTBC, a healthcare IT solutions provider for physician practices, which provided Smith with her patient portal, says his clients find that key patient drivers are the ability to review statements, pay balances, and schedule appointments through the portal.

Those features will also benefit your practice, as online bill pay will streamline collections, and research suggests that offering patients the ability to schedule their own appointments

PRACTICES THAT FAIL TO DEFINE THEIR EXPECTATIONS IN ADVANCE OFTEN GET LURED IN BY PRODUCTS THAT LOOK GREAT INITIALLY, BUT ULTIMATELY FAIL TO MEET THEIR NEEDS

Robert Wah, chief medical officer at CSC

decreases patient no-shows, says Donna Bristow, a senior adviser at healthcare IT consulting company, Impact Advisors.

To determine what other features will benefit your practice, ask for staff input. For instance, talk with your front-desk staff to identify what telephone inquiries they commonly receive. Then, think about what portal features may help offset those calls, says Wah.

EVALUATE THE FIT

After outlining your portal requirements, it's time to start shopping around. If you already have an EHR vendor, and that vendor offers patient portals, that's a great place to start your search, says Bristow, noting that

information is likely to flow more easily between the EHR and the portal if the products come from the same vendor. "I would say nine times out of 10 that is probably going to be their best option," she says. "... Nobody has to manually upload or build an interface; information should flow back and forth."

Still, that doesn't mean you should always select your EHR vendor's portal. Make sure it matches up to your list of requirements and expectations. "If there's something they really want and their vendor doesn't do it, then they need to look at, 'How do we get that in there?'" says Bristow. You may want to consider widening your search if the vendor is not willing to work with you to provide the missing feature, or provide it by a certain date, she says.

When assessing a potential portal, also determine whether the product is (or can be) configured appropriately for your practice and your patients. For instance, if you want to offer secure messaging, make sure the messaging feature is patient friendly and easy to use, says pediatrician Peter M. Kilbridge, a physician executive and informatics researcher at the Advisory Board Company, a global research, technology, and consulting firm. Or, if you want to offer online appointments requests, make sure the portal requires patients to fill out enough information so that staff can determine how long the patient's appointment should last, and how urgently the patient needs to be seen. "I think you have to look at the options that the vendor provides in terms of different ways of doing it," says Kilbridge.

IDENTIFY YOUR TEAM

As with any major project, identify a group who will determine the portal implementation timeline, monitor progress, and deal

with any problems that arise, says Bristow. Also make sure it's clear who has what authority when it comes to the portal. Individuals on this team might include your vendor partner, a physician leader, the practice manager, and if possible, patients and staff members who can share their input.

THROUGHOUT THE PORTAL IMPLEMENTATION AND ADOPTION PROCESS, ADJUST AND TWEAK YOUR WORK FLOWS TO BETTER ACCOMMODATE THE NEW TECHNOLOGY. THIS WILL ENSURE THAT YOU ARE MAXIMIZING THE EFFICIENCY IMPROVEMENT BENEFITS THE PORTAL PROVIDES.

Robert Wah, chief medical officer at CSC

“Providers are awesome, they are brilliant, but they don't always think like a patient,” says Bristow. “They might think, ‘Wow, this is slick, and this is going to work great,’ and the patient can't even figure out, ‘How do I run this thing?’”

Prior to implementation, train staff on portal use to ensure they will be comfortable discussing it with patients and answering questions. Critical items to cover include how to quickly create logins, how to reset passwords, and who to turn to when problems arise, says Snyder.

DETERMINE YOUR OBJECTIVES

Just as you should define your needs prior to selecting a portal,

you should identify your objectives prior to implementing one. That's because your implementation and marketing approach may vary depending on those objectives, says Snyder.

If your main priority is to use the portal to improve efficiencies and save staff time, a broad marketing strategy may be the best route. On the other hand, if your primary objective is to use the portal to help you satisfy the meaningful use requirements, you may want to focus more on promoting certain portal features to patients during and post implementation, such as the ability to exchange secure messages, and download and transmit lab reports, Snyder says.

Once you define your objectives, make those priorities clear to physicians and staff, and then set corresponding goals, says Snyder. For example: If your main objective is to save staff time and improve work flow, your goal might be 40 percent of new appointments are scheduled through the portal within 90 days of implementation.

ADJUST YOUR WORK FLOWS

Throughout the portal implementation and adoption process, adjust and tweak your work flows to better accommodate the new technology, says Wah. This will ensure that you are maximizing the efficiency improvement benefits the portal provides.

One big area to consider is how the portal influences work flow at the front desk. Many practices find that as more patients use the portal, staff members experience fewer phone calls per day because patients are submitting more of their inquiries and requests online. As a result, these practices can ask their front-desk staff to take on new or additional responsibilities.

“Oftentimes we are very wed to our old way of doing things, and the old way of do-

ing things was set up the way it was because of limitations of phone calls, or messaging, or something like that,” says Wah. “One thing that a portal allows is asynchronous communication, whereas a phone call requires synchronization — somebody's got to be there to answer the call when it comes in. With a portal, the receiver and the sender don't have to be on the portal at exactly the same time.”

While the portal might ease up on some staff members' responsibilities, keep in mind that there are some new responsibilities associated with it that staff must take on, says Wah. For example,

“YOU WANT TO MARKET THAT BABY WELL BEFORE IT COMES OUT SO YOU GENERATE SOME EXCITEMENT.”

Donna Bristow, a senior adviser at healthcare IT consulting company, Impact Advisors.

a staff member should regularly check the portal for messages and requests; and physicians and/or other clinical staff should set aside some time each day to respond to messages.

PROMOTE EARLY AND OFTEN

Since so much of portal success hinges on patient engagement, start promoting it to patients as soon as you embark on the portal adoption process. Use a variety of methods, such as advertising on posters and in pamphlets; including information on billing statements; and discussing it with patients when they call to set up appointments and come in for visits, says Bristow. “You want to market that baby well before it comes out so

you generate some excitement.”

Staff and physicians will play a key role in marketing the portal, so determine how to weave portal promotion into every day work flows. For example, every time a patient calls the front desk to request a prescription refill, staff should describe the portal’s prescription refill request feature and offer to help patients through the portal log on and prescription refill request process, says Snyder. To ensure staff members know how to broach these conversations, Snyder recommends providing them with a list of talking points.

For a sample of talking points provided by Snyder, visit bit.ly/portal-talking-points.

If you have the manpower, ask staff members to meet with patients one-on-one to discuss the portal, and help them register. “Rather than hoping the patient will do it, [some practices] sit down and do it with them,” says Kilbridge. “That’s very effective.”

Another idea: Print out small cards with information about the portal and how to log on so that staff and physicians can distribute these cards to patients, says Kilbridge, adding that physicians are a game changer when it comes to patient portal engagement. “If the doctor tells you that they want you to go and look at the results and follow up on this visit on the portal, you’re more likely to do that than if you just got an e-mail from your doctor or a [promotional] piece of mail ...” he says. “The doctors need to actively market the portal in person with patients.”

When promoting the portal, staff members should make it clear how the various features will benefit patients, says Snyder. For instance, rather than saying, “Wouldn’t it be great if you could access your clinical information?” staff should say, “Wouldn’t it be great if you could generate a message to us any

time?” Or, “Wouldn’t it be great if you could request a refill online rather than having to call in?”

To provide even more incentives to get patients onboard, provide special perks to portal users, such as appointment slots reserved specifically for patients who schedule appointments through the portal, says Snyder.

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ENSURE CONTINUED ENGAGEMENT

Make sure you also provide appropriate incentives to keep staff motivated to meet your various patient portal objectives. One of Snyder’s practices, for instance, hosted a special lunch for staff members after a certain percentage of patients had registered for the portal.

In addition to crafting a plan to keep staff motivated, have a plan to keep patients coming back to the portal. On a monthly basis, consider generating an announcement or message to patients through the portal so that patients are notified via e-mail that they

have a message waiting for them and they log back in, says Snyder. Also, respond to patient inquiries and messages sent via the portal quickly and appropriately.

Another way to ensure continued patient engagement: Address technical glitches quickly so that patients don’t give up on the portal when they encounter problems. Meredith Pakpour, who manages a solo internal medicine practice in Atlanta, says that strong communication when problems arose was one of the key reasons her practice was able to successfully implement its portal last year. “It was really important that we had everybody working together in order to get issues taken care of,” says Pakpour. “It was so important to have good communication with IT and with whoever was, for instance, receiving the calls from the patients with their input.”

MESSAGE MISCONCEPTIONS

A common feature found in patient portals is the ability for patients to securely message their practices and physicians. But while it’s a convenient tool for patients, some physicians fear they will be inundated with patient messages.

Peter Kilbridge, a physician executive and informatics researcher at The Advisory Board Company, however, says that’s a big misconception. “... The asynchronous nature of the secure messaging actually makes for a much more efficient day, and the doctors don’t spend nearly as much time on the phone,” he says. “It’s very, very difficult to have a phone call that only lasts 20 seconds, but in fact you could have an e-mail that takes you 20, 30, 40, 50 seconds that includes everything the patient needs to know in response to their questions.” ■

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