blue of california
foundation

CCI
CENTER FOR CARE
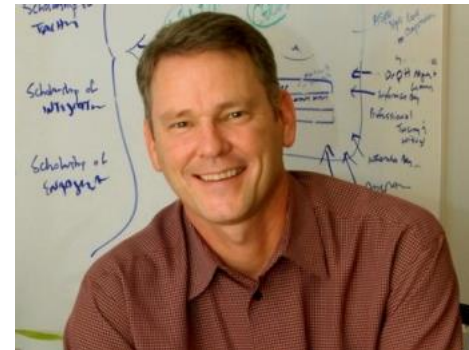INNOVATIONS

Spreading Solutions That Work
Patient Portal Program

Idea Sharing
Webinar #4
Data Visualization

8/10/17

Welcome

Jennifer Wright, MPH
Improvement Advisor and Spreading
Solutions Program Manager

Jim Meyers, DrPH
Coach

Housekeeping

❖ Webinar is being recorded and will be emailed with slides
❖ Line is not muted; please control your own muting to eliminate background noise
❖ Use chat box for questions

Agenda

- **Announcements**

- **Lessons from the Field**

- **Grantee Idea Sharing**

- **Discussion**

Idea Sharing Webinar Format

- **Just-in-time!**
  - You Pick the Topics
  - TA – Solid Examples
  - Learning Community Sharing

- **Sharing Common Examples, the Good and the Bad**

- **Record Webinar for Future Sharing**

- **Follow-up With Each Other**

Announcements

- **Sept 14: Idea Sharing Webinar #5: Overcoming Language Barriers**

- **Oct 12: Idea Sharing Webinar #6: Vendor Partnerships**

Lessons From The Field

Common Themes in Dashboards

- **KEY: Visualization shown over time and with comparison to a goal or standard (use of stop light colors and arrow up for good is a plus)**

- **Measures are often split between operations measures and satisfaction measures shown trended over time**

- **Common Measures are:**
  - **# of unduplicated patients**
  - **# offered enrollment**
  - **# enrolled**
  - **# of active users**
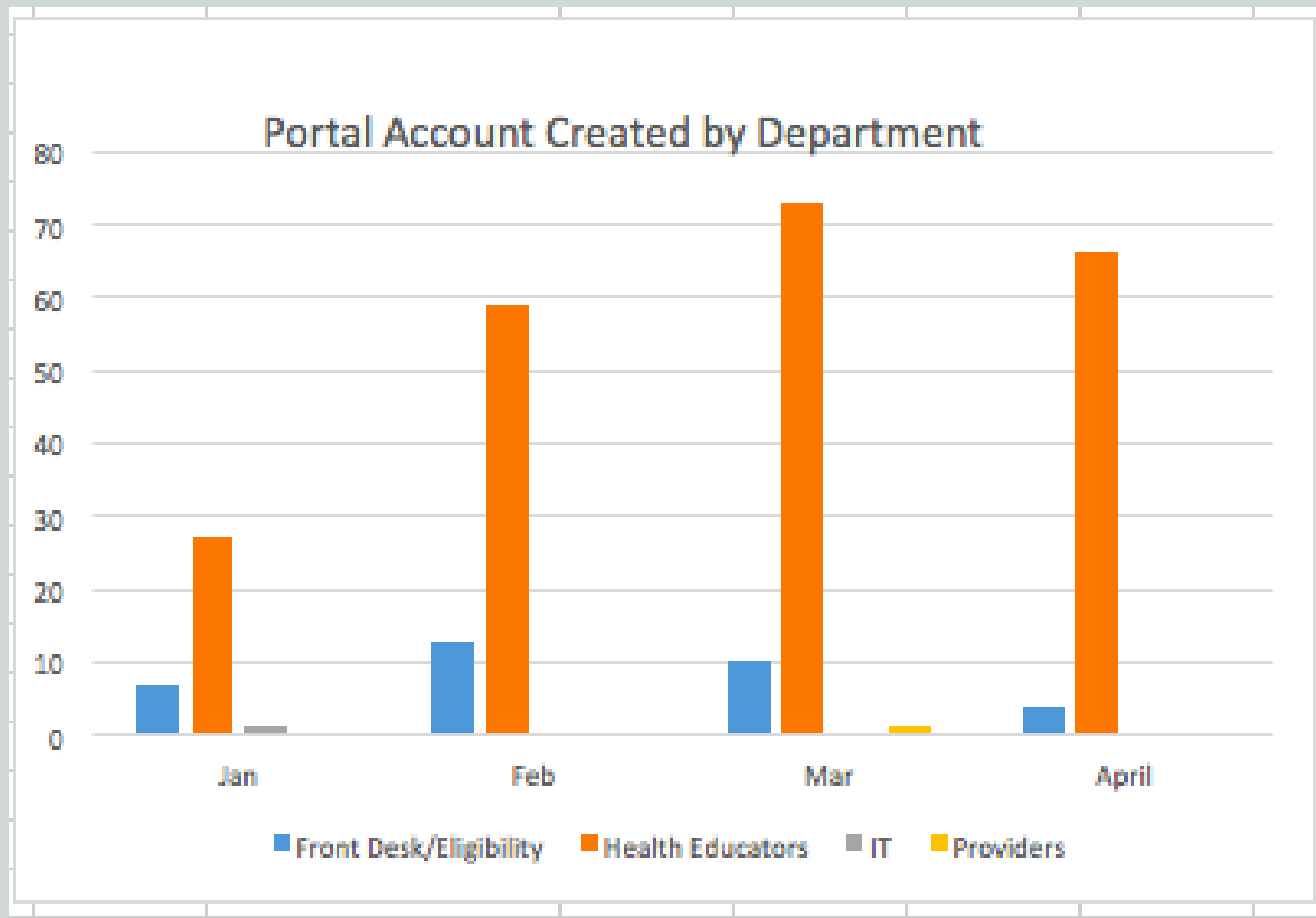
Common Themes in Dashboards

- **Progressive Measures**
  - **Pages that are hit**
  - **Portal task turn around times**
  - **Error report**

- **Really Progressive Measures! (Outcomes Measures)**
  - **Portal users and better clinical outcomes**
  - **Portal users and better financial outcomes**

Resources

- **Ideas for Portal Performance and Outcomes Measures – From An Experienced Safety Net Clinic CIO**

- **Common Patient Portal User - Operations - Satisfaction Measures**

- **Vendor-specific Folders on Producing Patient Portal Metrics Reports**

- **Over a dozen examples of reports and dashboards for single and multiple location reporting**
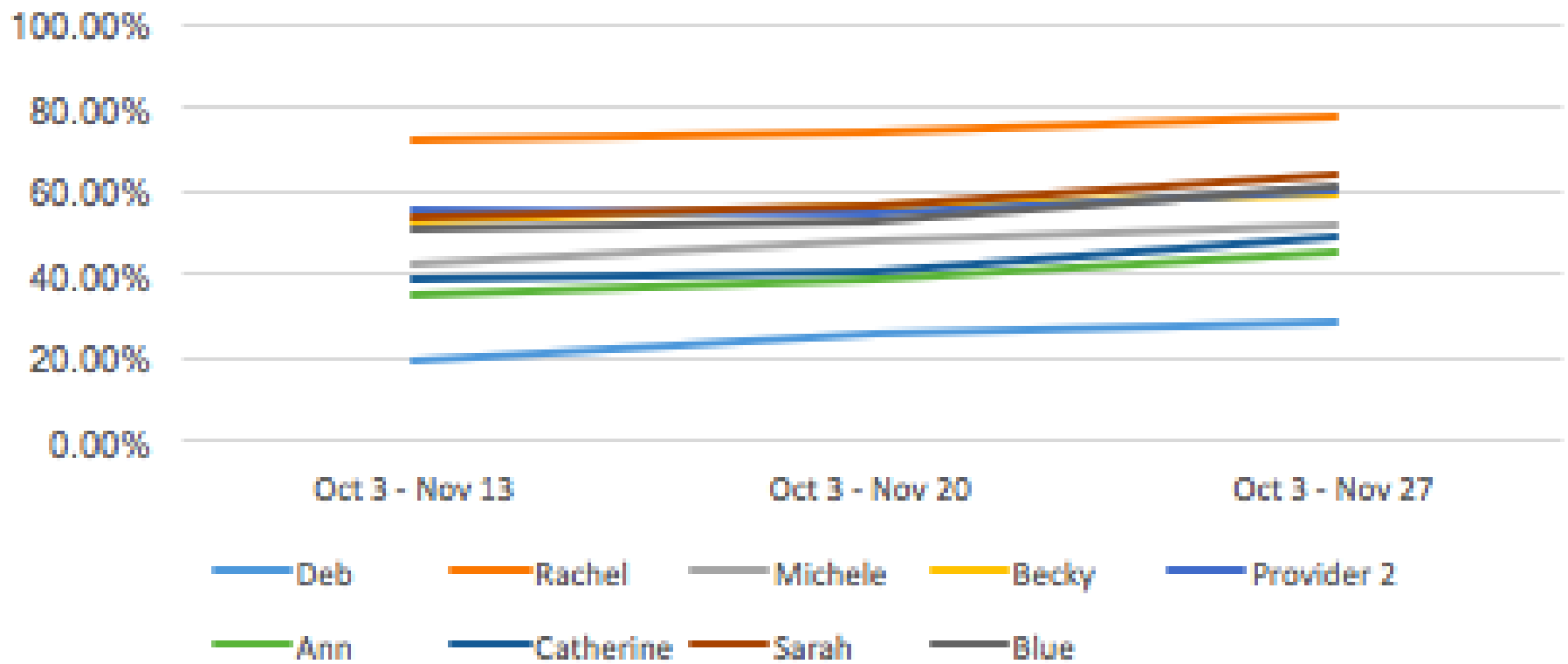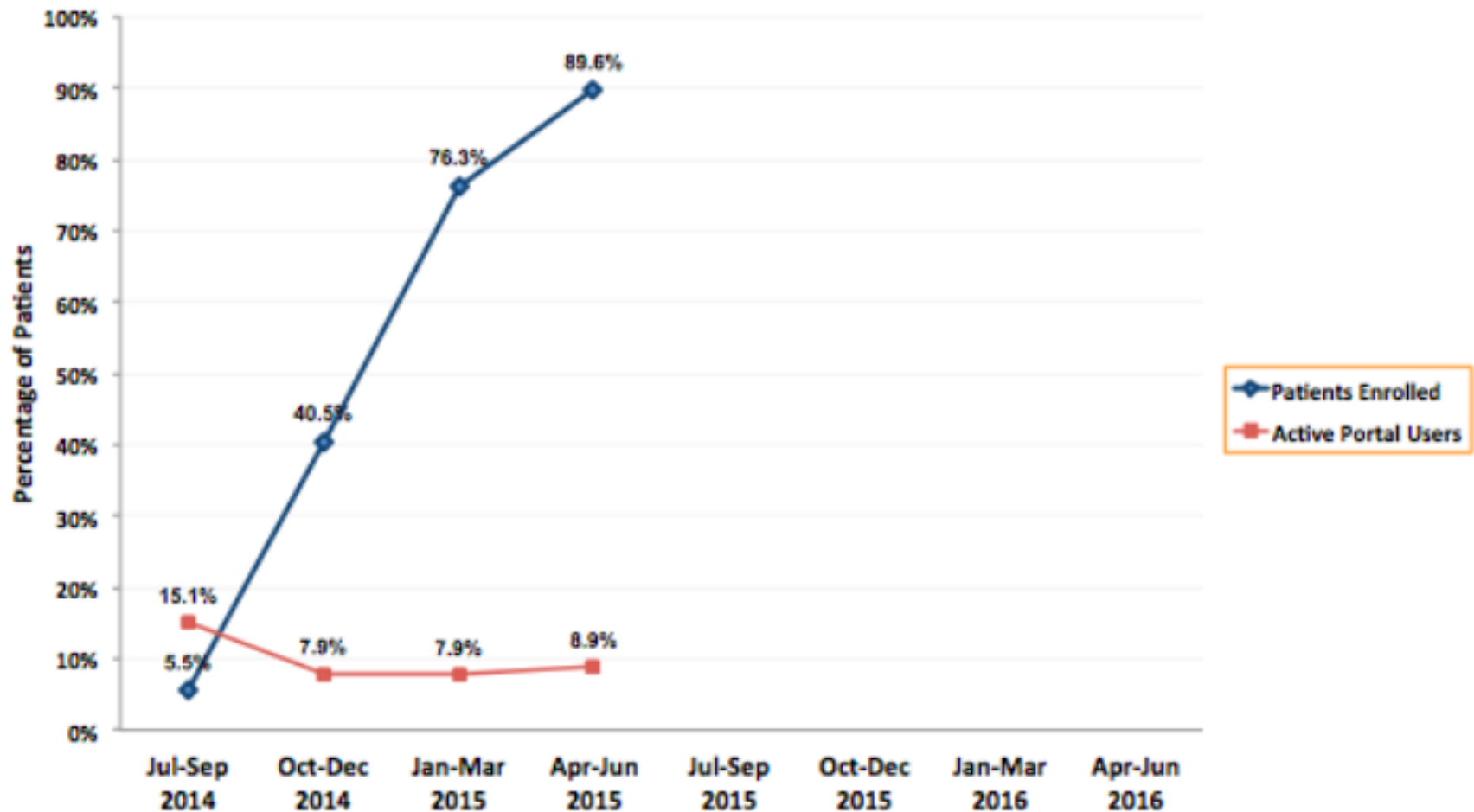
Examples of Portal Data Visualizations

Portal Account Created by Department

Legend: Front Desk/Eligibility, Health Educators, IT, Providers

Examples of Portal Data Visualizations

Portal Enrollment by Provider Name

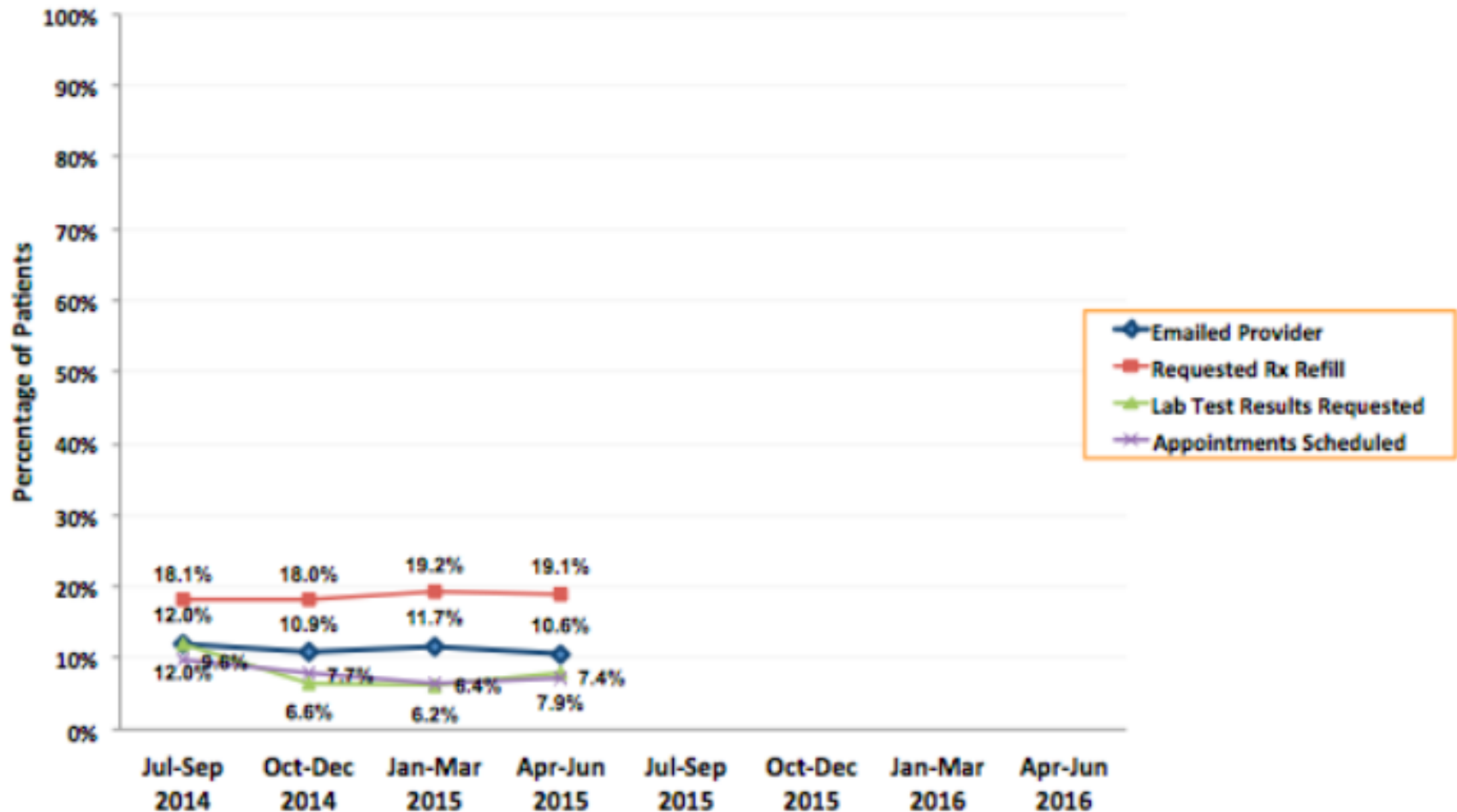# Examples of Portal Data Visualizations

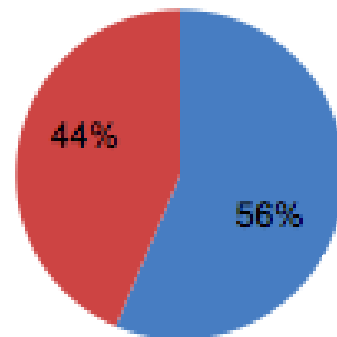# Examples of Portal Data Visualizations

Patient Portal Services Used

Examples of Portal Data Visualizations
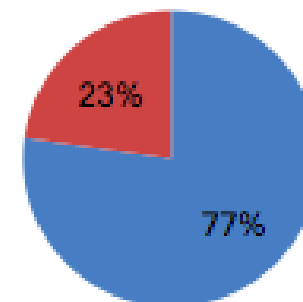
Grantee Idea Sharing

Please keep comments under 5 minutes

San Mateo Medical Center

NIA JOHAR
PCMH COORDINATOR
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650-573-4721

Who We Are

- **Where We Are Located: San Mateo, California**
- **Number of Clinics in the Organization: 8 physical locations providing multiple services in each site**
- **Total Number of FTE Providers: 120+**
- **Date Portal First Went Live: 2012**
- **Portal Vendor: eClinicalWorks**
- **Target Population the First 6 Months: Primary Care, Adults followed by a diabetic educator**

Showing Data to Your Team

- Do you show data on patient portal operations to your team at the monthly meeting?
  - *Yes we take a look at the reported data from eCW*

- How do you show that data?
  - *We've found that eCW gives us a limited data set.*
  - *There is a chart version as well but we don't find it very helpful (SEE NEXT SLIDE)*

Notification Logs

Sent eMails Logs

eMail Failures Logs

Portal Customization

Site Builder

Responsible Party Settings

Access Logs

Health Record Access Logs

Lab Access Logs

Statement Access Logs

Patient Access Logs

Locked Accnts

Unsubscribed User List

Switch to Charts

Usage Log Statistics [Captured after 2014-06-11 14:11:53.0]

Total number of web enabled patients:	12163
Total number of unique patients who have logged in:	3543
Total number of successful logins:	19420
Total number of unsuccessful logins:	5877
Total number of locked accounts:	2
Number of unique labs viewed:	11393
Number of unique statement viewed:	0

Usage Log Statistics from portal Go-Live

Total number of messages received from the practice:	48
Total number of general messages sent to the practice:	0
Total number of lab requests sent to the practice:	0
Total number of appointment requests sent to the practice:	0
Total number of referral requests sent to the practice:	0
Total number of refill requests sent to the practice:	0
Total number of personal demographic updates submitted by patients:	0
Total number of additional demographic updates submitted by patients:	0
Total number of web interviews submitted by patients:	0
Total number of appointment reminders sent from the practice:	0
Total number of appointment confirmations sent from the practice:	0
Total number of lab notifications sent from the practice:	23331
Total number of message notifications sent from the practice:	0

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INNOVATIONS

Showing Data to Your Organization

- **Do you show data on patient portal operations to your organization – meetings, senior leader reports/dashboards?**

  - **Not currently**

The Good, The Bad…

- What is working…
  - *Ability to view basic metrics*
  - *Have a new patient portal rep from eCW*

- What is not working…
  - *We wish that we were able produce more helpful metrics from eCW's raw data*
  - *The data is not able to be broken up by a certain time period*

- One question I have for the group…
  - *To the other team who has eCW, have you found a way to manipulate the data from eCW? Outside vendor?*

Planned Parenthood California Central Coast

YOLANDA

Who We Are

- **Where We Are Located: California Central Coast covering San Luis Obispo, Santa Barbara and Ventura Counties**

- **Number of Clinics in the Organization:5**

- **Total Number of FTE Providers: 14**

- **Date Portal First Went Live:12/2015**

- **Portal Vendor: NextGen**

- **Target Population the First 6 Months: Follow up contact within 30 days to review most common side effects with all patients initiating long acting reversible contraceptives (LARC) and depo as their birth control of choice.**
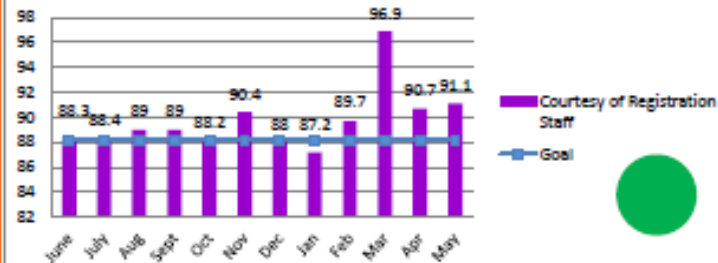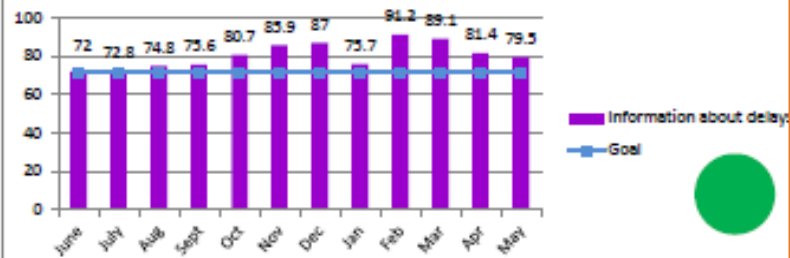
Showing Data to Your Team

- Do you show data on patient portal operations to your team at the monthly meeting?
  - *Yes, every health center has a monthly meeting. A week prior, the manager receives their monthly dashboard results. They share with their team and must report back on what is going well, challenges and improvement work plan if they are not meeting a metric.*

  - *We will begin including portal data with their July report to be reviewed during August staff meeting 8/25.*
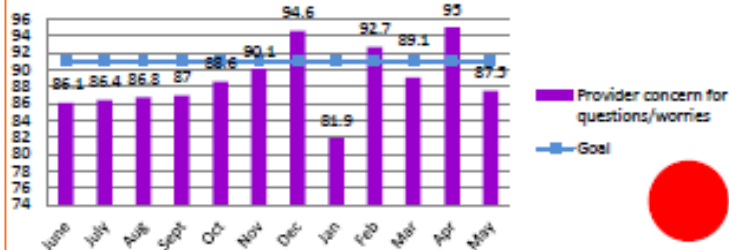
- How do you show that data? (See Screen Shots next)

Sample Screenshots – Patient Experience

Sample Screenshot

MyCare Tokens
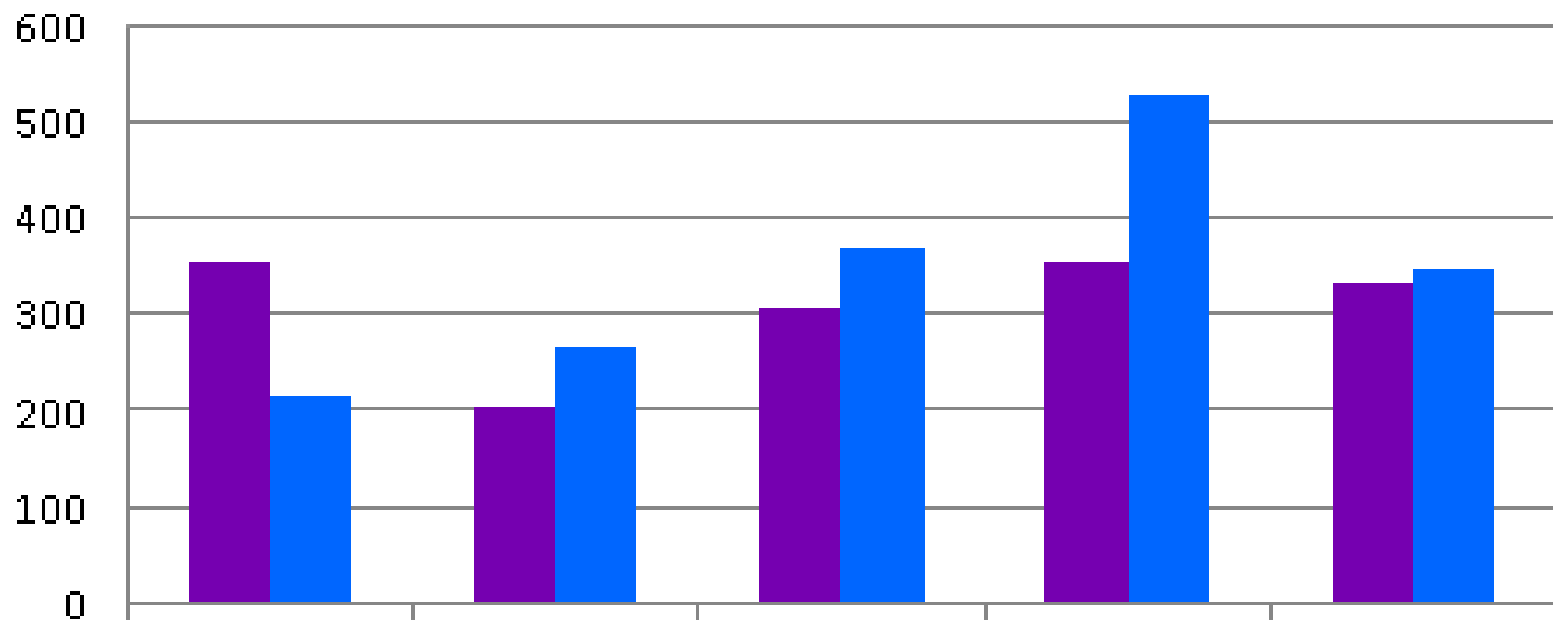
	SLO	SM	SB	VTA	TO
Jun	355	202	305	355	333
Jul	214	265	369	526	345

Showing Data to Your Organization

- Do you show data on patient portal operations to your organization – meetings, senior leader reports/dashboards?
    - *Yes, quarterly we have an affiliate wide webinar. Each senior leadership member must report their department dashboards results along with what is going well, challenges and plan for improvement. Our first meeting for this fiscal year will be in October and will include portal metrics*

- How do you show that data? (See Screen Shots next)

Sample Screenshots – chlamydia screening metric

CT Screening for Females 24 and under

	Apr	May	Jun
SLO	93%	89%	90%
SM	88%	86%	84%
SB	84%	83%	84%
VTA	80%	82%	74%
TO	85%	83%	80%
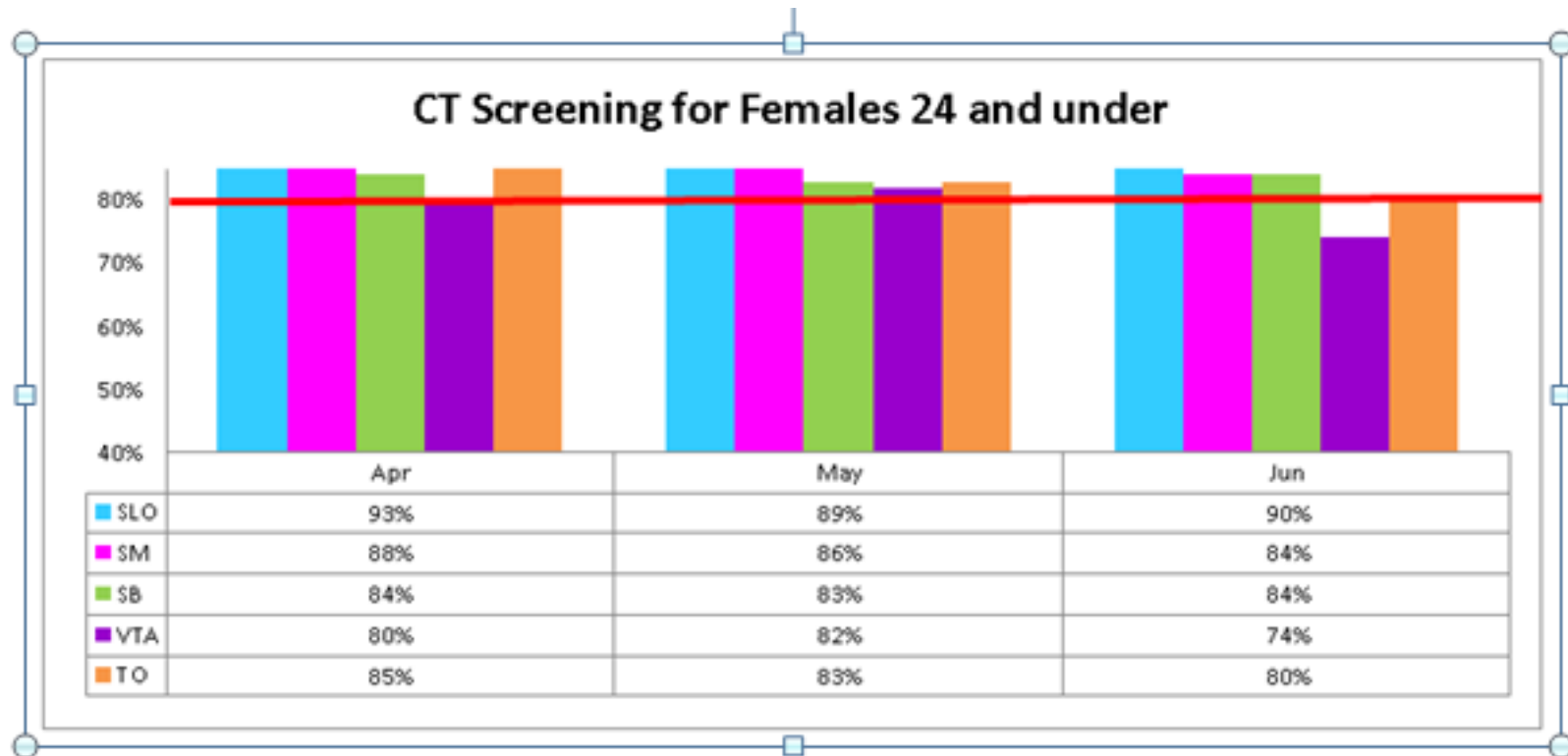
Chlamydia testing (target: 80% of females 24 and under)

Sample screenshot – cycle time metric

ilth care and their provider.

Family Planning Cycle Times

	Apr	May	Jun
SLO	58	60	56
SM	70	55	55
SB	50	51	50
VTA	57	56	55
TO	60	54	57
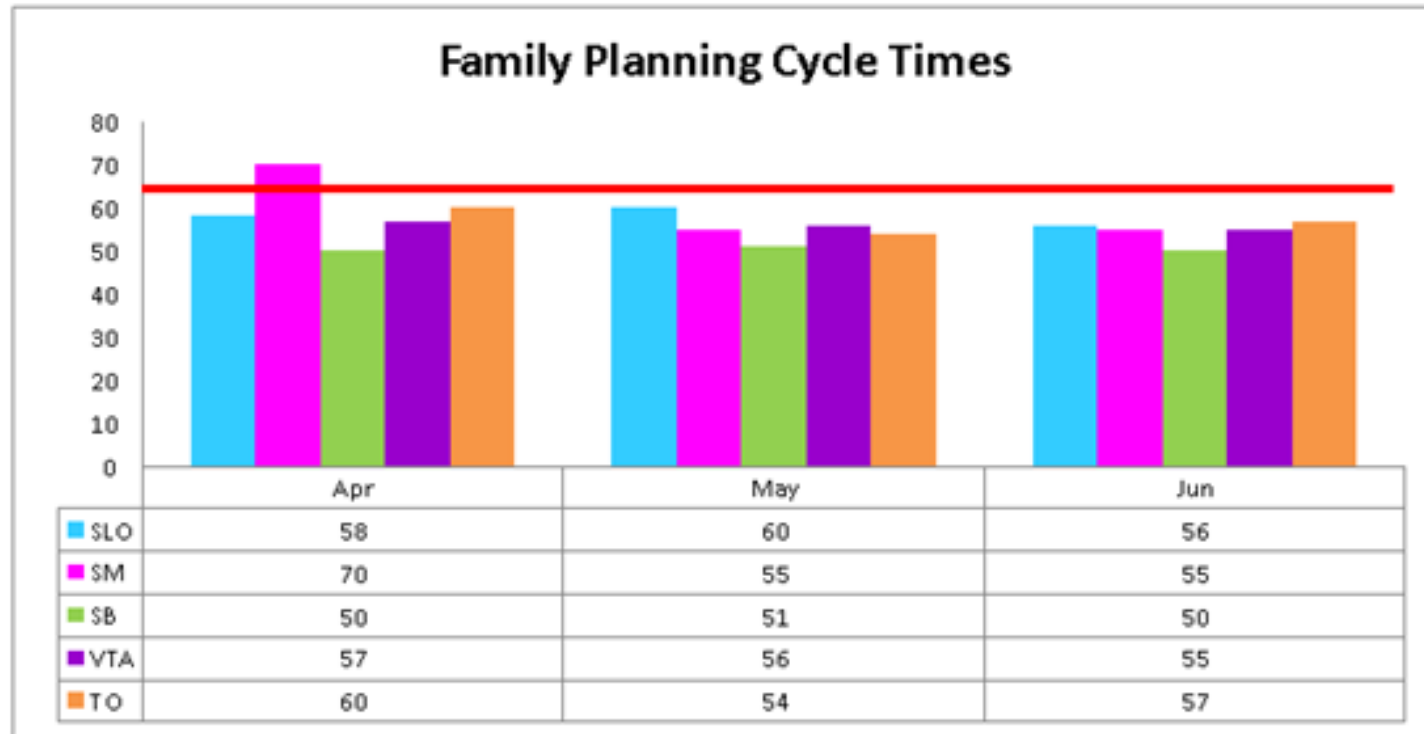
Cycle times (target: 65 minutes or under)

The Good, The Bad...

- What is working...
  - *Setting up metrics by department prior to new fiscal year*
  - *Monthly reporting followed by quarterly senior leader reporting*
  - *Incentives for staff*
- What is not working...
  - *Still experiencing some difficulty with portal reports but we are continuing to work with Charles.*
- One question I have for the group...
  - *No questions regarding data at this time.*

Venice Family Clinic

MEGHAN POWERS

QUALITY IMPROVEMENT MANAGER
MPOWERS@MEDNET.UCLA.EDU

310-664-7634

Who We Are

- **Where We Are Located: Venice, CA**
- **Number of Clinics in the Organization: 10 clinical sites**
- **Total Number of FTE Providers: ~35**
- **Date Portal First Went Live: November 2014**
- **Portal Vendor: NextGen (NextMD)**
- **Target Population the First 6 Months: Diabetics & Teens**

Showing Data to Your Team

- Do you show data on patient portal operations to your team at the monthly meeting?
  - *Yes, portal data is shared at a variety of meetings. We review at each of our portal team meetings. Additionally, metrics are shared monthly at our "coordinating team" meeting*

Showing Data to Your Team

Average of…

170 patients enrolled
190 messages sent by patients
300 message sent by staff
146 appointments requested

… monthly

7,200
Patients enrolled in portal

4,079
Active portal users in FY 16-17

16% of all patients were active portal users last FY
57% of enrolled users were active portal users last FY
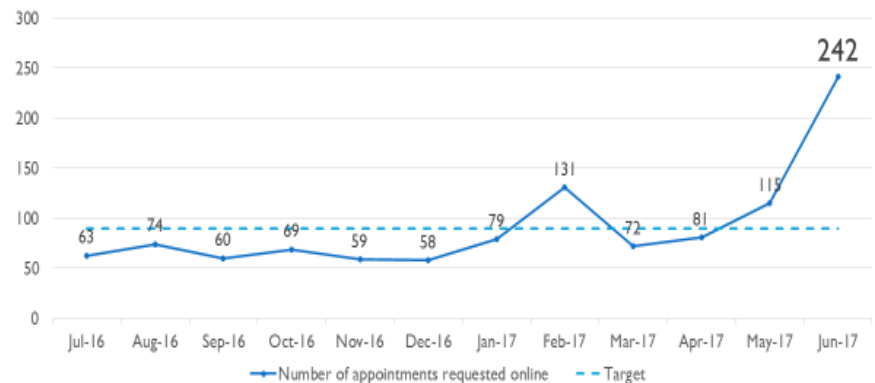
Showing Data to Your Team

Showing Data to Your Team
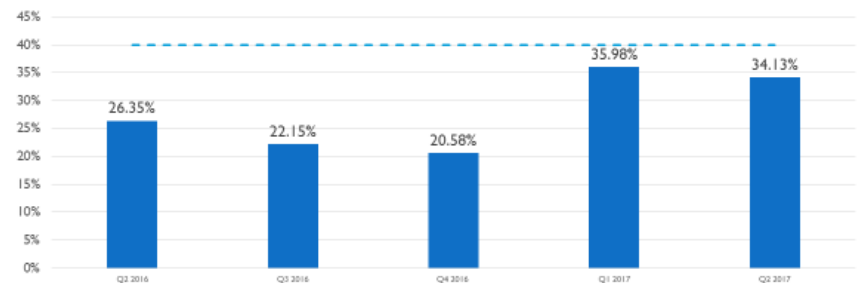
Showing Data to Your Organization

- Do you show data on patient portal operations to your organization meetings, senior leader reports/dashboards?
  - *Yes, at shared at operations, provider and site meetings. Portal data is not yet on an organizational dashboard reviewed by senior managers or the board, but they are provided updates as appropriate. The board is interested in the portal and leveraging it to improve patient experience and access, so we have been asked to present at an upcoming meeting.*

- How do you show that data?
  - *Similar style. Power point slides with charts and key figures.*

The Good, The Bad…

- What is working…
  - *Access to metrics, updating regularly*
  - *Using data to inform portal strategies and updates*

- What is not working…
  - *Stuck at # of staff sending messages to patients*

- One question I have for the group…
  - *What is your goal for active portal users? How do you arrive at goals for portal related metrics.*

Northeast Valley Health Corporation

MAITE MARTIN
DIRECTOR HEALTH CARE OPERATIONS
PATIENT PORTAL TEAM LEADER
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818-898-1388 X 41710

Who We Are

- **Where We Are Located: San Fernando, CA**
- **Number of Clinics in the Organization: 14**
- **Total Number of FTE Providers: 142**
- **Date Portal First Went Live: 2014**
- **Portal Vendor: Nextgen**
- **Target Population the First 6 Months: All Patients**

Showing Data to Your Team

- Do you show data on patient portal operations to your team at the monthly meeting?
  - *Yes.*
  - *Data is presented with all team members at the monthly Portal Team Meeting, Care Team Meetings, Access to Care Meetings and other. Data is also presented at the clinic site level and shared at the Provider Supervisor Meetings as well as the All staff Site Meetings.*
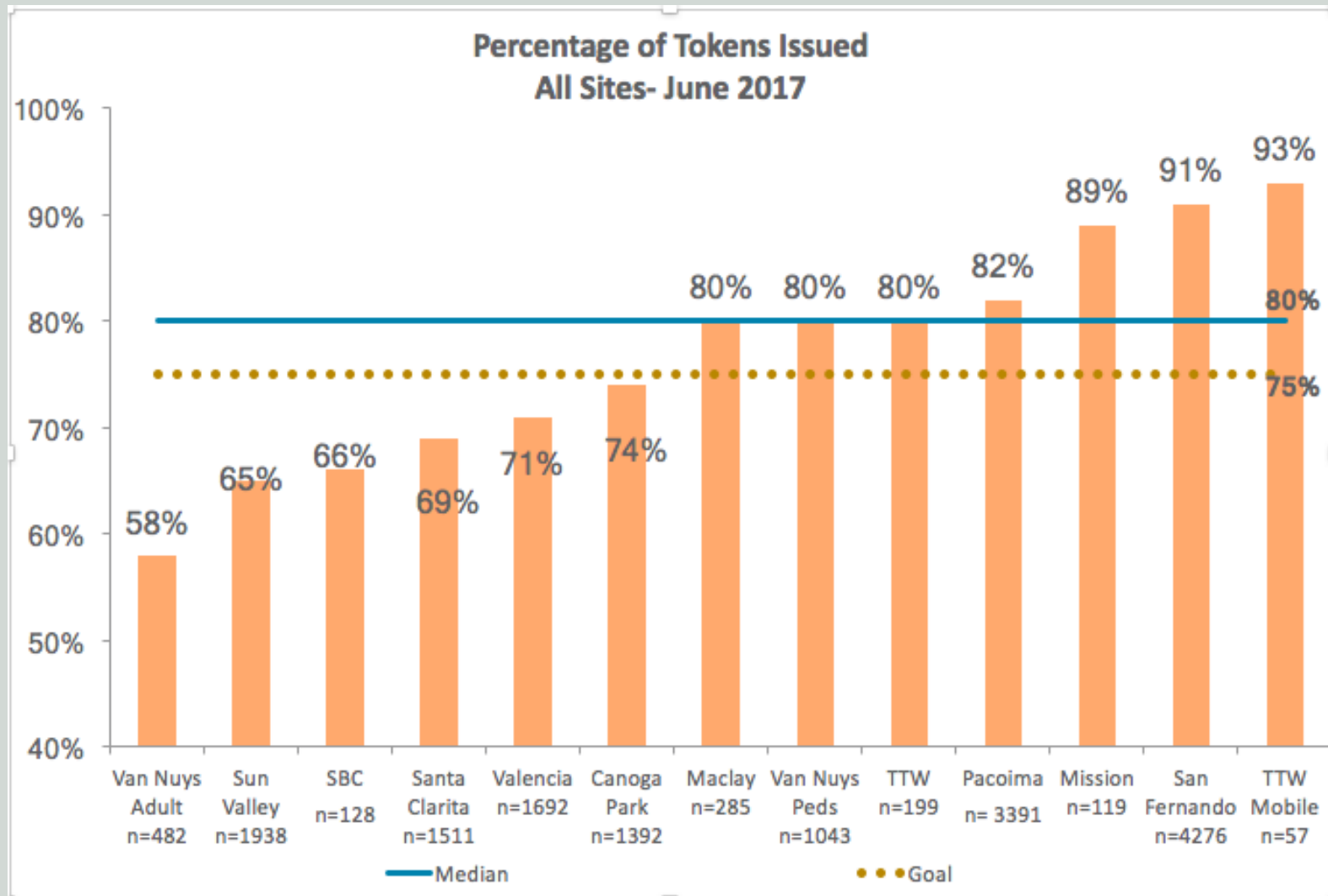
Showing Data to Your Team

Percentage of Tokens Issued
All Sites- June 2017

Showing Data to Your Organization

- Do you show data on patient portal operations to your organization meetings, senior leader reports/dashboards?
  - *Yes.*
  - *Data is also presented at the clinic site level and shared at the Provider Supervisor Meetings as well as at the All staff Site Meetings.*

Showing Data to Your Organization
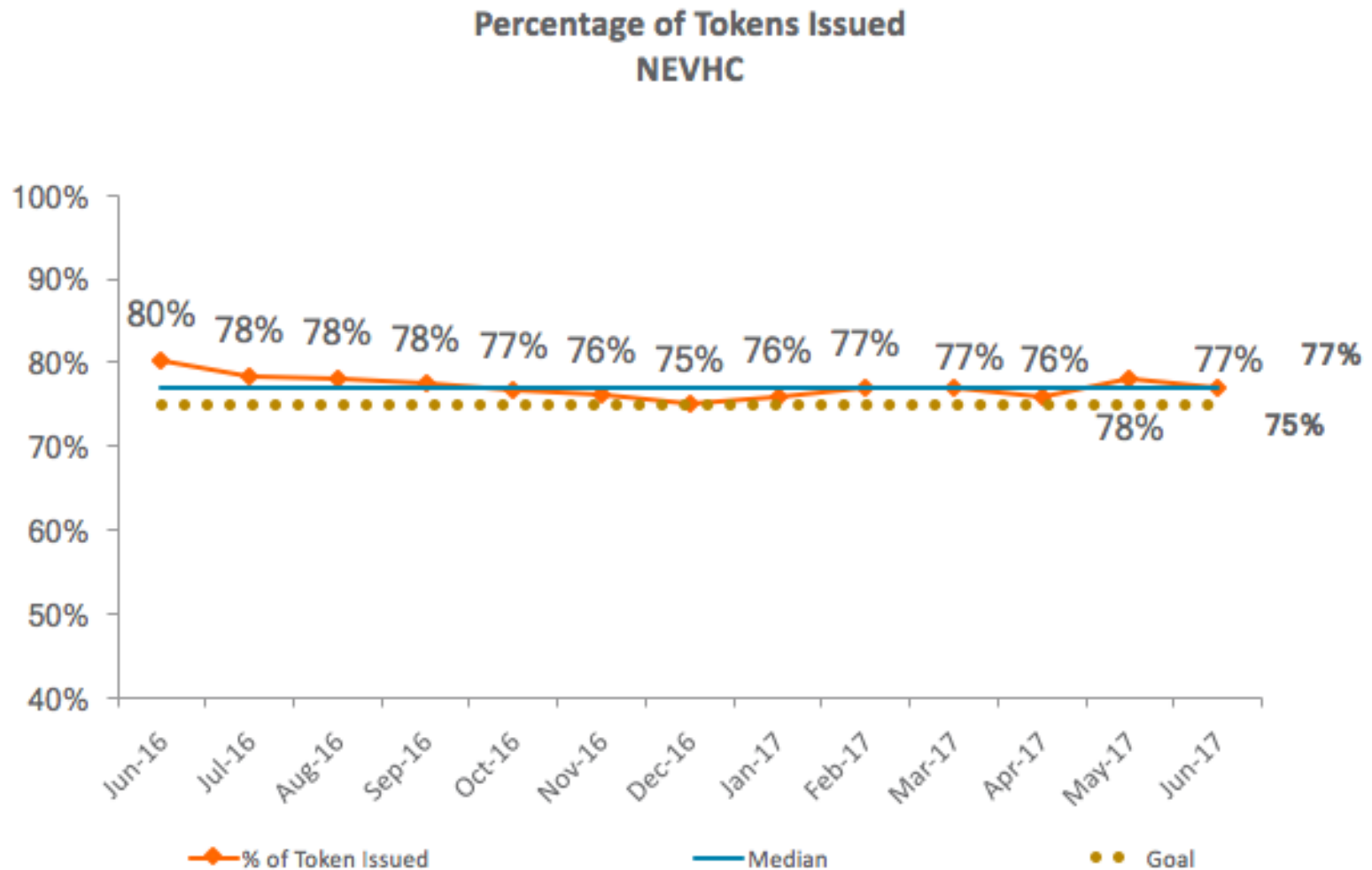
The Good, The Bad…

- What is working…
    - *As a result of the various venues in which the portal data is reviewed, we continue to examine our reports for accuracy, in an effort to keep them simple and easy to understand for all levels of Management, and staff.*

    - *Making the data reports simple and meaningful provides a clear understanding of our current state, more clearly defines where focused interventions are needed, and fosters engagement at all levels to help drive the changes necessary to meet and exceed our future target goals.*

The Good, The Bad… (cont.)

- <u>What is not working…</u>
  - *Team struggle with lack of administrative, staff and IT bandwidth, needed to reinforce the trainings, policies, and our current efforts.*

- <u>One question I have for the group…</u>

  Are any other Clinics currently releasing radiology or diagnostic imaging into the Portal? If so, what Portal and EHR are you using?

UMMA Community Clinic

SUSANA FLORES
DIRECTOR OF CLINICAL OPERATIONS
SFLORES@UMMACLINIC.ORG
OFFICE: 323.668.7736 CELL: 310.408.6615

Who We Are

- **Where We Are Located: South LA**
- **Number of Clinics in the Organization: 2**
- **Total Number of FTE Providers: 7**
- **Date Portal First Went Live: February 2016**
- **Portal Vendor: eClinical Works (eCW)**
- **Target Population the First 6 Months:**
  - **Diabetic Patients requesting medication refills**
  - **Parents/Guardians requesting copy of Immunization record**

Showing Data to Your Team

- Do you show data on patient portal operations to your team at the monthly meeting?

    – *Currently, we do not present patient portal data to our team.*

- How do you show that data?

    – *Currently, we do not but if we did it would be as seen on the next slide:*

Showing Data to Your Team

Usage Log Statistics [Captured after 2014-03-28 13:29:54.0]	
Total number of web enabled patients:	2463
Total number of unique patients who have logged in:	326
Total number of successful logins:	1248
Total number of unsuccessful logins:	247
Total number of locked accounts:	0
Number of unique labs viewed:	61
Number of unique statement viewed:	0

Usage Log Statistics from portal Go-Live	
Total number of messages received from the practice:	9509
Total number of general messages sent to the practice:	125
Total number of lab requests sent to the practice:	2
Total number of appointment requests sent to the practice:	7
Total number of referral requests sent to the practice:	12
Total number of refill requests sent to the practice:	50
Total number of personal demographic updates submitted by patients:	40
Total number of additional demographic updates submitted by patients:	13
Total number of web interviews submitted by patients:	0
Total number of appointment reminders sent from the practice:	20428
Total number of appointment confirmations sent from the practice:	0
Total number of lab notifications sent from the practice:	0
Total number of message notifications sent from the practice:	0

Showing Data to Your Organization

- Do you show data on patient portal operations to your organization meetings, senior leader reports/dashboards?
  - *Currently, we do not present patient portal data to our team.*

- How do you show that data?
  - *Currently, we do not but if we did it would be seen as shown on the previous slide*

The Good, The Bad…

- What is working…
  - *Currently, we do not present patient portal data to our team.*
- What is not working…
  - *We do not have a great reporting tool on our EMR which shows us the data we want. Other than the one's shown:*

Usage Log Statistics [Captured after 2014-03-28 13:29:54.0]	
Total number of web enabled patients:	2463
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Total number of web interviews submitted by patients:	0
Total number of appointment reminders sent from the practice:	20428
Total number of appointment confirmations sent from the practice:	0
Total number of lab notifications sent from the practice:	0
Total number of message notifications sent from the practice:	0

- However, we will begin to work with our QI Coordinator on helping to gather data from EBO.

- One question I have for the group?
  - *For eCW Users, how do you gather your data, this dash-board, EBO or other?*

Contact Us

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Coach