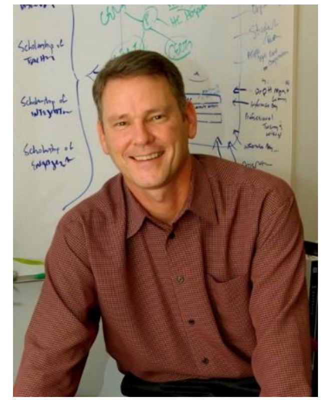
Spreading Solutions That Work
Patient Portal Program

Idea Sharing Webinar #1
Workflow

5/11/17

Welcome

Meaghan Copeland
Program Coordinator



Jim Meyers, DrPH
Coach

Housekeeping

- ❖ Webinar is being recorded and will be emailed with slides
- ❖ Please mute yourself to avoid background sound
- ❖ Use chat box for questions or unmute yourself

Agenda

- Idea Sharing Webinar Format
- Announcements
- Common Approaches and Resources
- Grantee Example Sharing
- Discussion

Idea Sharing Webinar Format

- Just-in-time!
  - You asked for it
  - 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

- Work Plans are Due – Use Tracking Spreadsheet if you wish
- Metrics are Due: May 17 (Link to Form Sent)
- June 8: Overcoming Enrollment and Password Reset Barriers
- July 13: Options for a Successful Training
- Minors Issues – watch video (Webinar Link - Minors Patient Portals and California Law - Rebecca Gudeman - Oct 2015), look at slides
- Dashboards – soon?

Patient Portal Workflows

COMMON APPROACHES AND RESOURCES

What Do We Know

CCI
CENTER FOR CARE INNOVATIONS

- Organizational culture dictates success
- Common Theme: follow the worn path – people chose it for a reason
- Resources:
  - 2 areas with resources – section 6 (Portal Features and Functions) and section 12 (Workflows)
  - 1-hour Webinar - Patient Portal Appointment Scheduling
  - Appointment options, case studies workflow example
  - Patient Portal work flow charts and examples for front desk, portal representative and providers

Grantee Experiences

PLEASE TRY TO STAY UNDER 5 MINUTES PRESENTATION TIME

Northeast Valley Health Corporation

MAITE MARTIN
DIRECTOR HEALTH CARE OPERATIONS
PATIENT PORTAL TEAM LEADER
MAITEMARTIN@NEVHC.ORG
818-898-1388 X 41710

Who We Are

CCI
CENTER FOR CARE INNOVATIONS

- 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

NEVHC
Northeast Valley Health Corporation
a california health+ center

Portal Functions and Workflow

- Appointment Request
  - Who gets this portal task
  - What do they do with it?
- Call Center receives appointment requests.
- Non-Sick appoint. Requests: Call Center provides appoint. options via Portal
- Sick appoint. Requests: Call Center sends message to Triage Nurse.
- Medication Refill Request
  - Who gets this portal task? Portal Response Teams
  - What do they do with it? Responds to Pt. or forwards to Provider

Portal Functions and Workflow

- Function #3 Secure Messaging
  - Who gets this portal task? Portal Response Team
  - What do they do with it? Answer what they can based on scope of practice. Forward messages requiring Provider feedback to PCP.

Portal Workflow

CENTER FOR CARE INNOVATIONS

- What is working…
  - Secure Messaging, Appointment Requests, Lab result and Rx Refill Requests options being used by patients.

- What is not working…
  - "Request Summary of Medical Records" currently under development by NG.
  - Message Response time.

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- One question I have for the group…
  - Has anyone developed a "Pay my Bill " option on the NG Portal?

Planned Parenthood California Central Coast

YOLANDA ROBLES

VP OF CLINICAL OPERATIONS
YOLANDA.ROBLES@PPCENTRALCOAST.ORG
805 722-1512

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.

Portal Functions and Workflow

- Ask a nurse
  - Case Management nurses are responsible for all incoming patient messages.
  - They review the message and send a reply.

- Review Medical Records
  - Call Center agents or Case Management Nurses
  - If patient needs a password reset, it can be handled by agents. If records have not been released they must message a nurse.

Portal Functions and Workflow

- Review Lab results
  - Results must be reviewed by a nurse.
  - Once the result gets reviewed it is posted to the portal or a follow up plan is communicated if lab is abnormal.

- View an Invoice
  - Billing department
  - Billers must post the invoice on the patient portal

Portal Workflow

- What is working…
  - Using Otech (self registration) to enroll patients in portal
  - Reports – data with number of enrollments by health center staff

- What is not working…
  - Portal Landing Page is NextGen design not PPCCC
  - Portal token does not always work and patients have to call in to reset.

- One question I have for the group…
  - Is anyone having staff assist patients to access a function on the portal during their visit?

UMMA Community Clinic

SUSY 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

Portal Functions and Workflow

- General Messages
  - Who gets this portal task? Susy, Director of Clinical Operations
  - What do they do with it?

- Refill Messages
  - Who gets this portal task? Amanda, Lead MA
  - What do they do with it?

Portal Functions and Workflow

- Appointment Messages (live)
  - Who gets this portal task? Not activated
  - What do they do with it? Not activated

- Referral Messages
  - Who gets this portal task? Jose, Lead Patient Referral Coordinator
  - What do they do with it?

Portal Functions and Workflow

- Lab Messages
  - Who gets this portal task? Magdalena, Phlebotomist
  - What do they do with it?

- Demographic Update Messages
  - Who gets this portal task? Susy, Director of Clinical Operations
  - What do they do with it?

Portal Workflow

- What is working…
  - Messages are coming through and responses are being handled within 3-5 days
- What is not working…
  - Staff training
  - Delegation
- One question I have for the group…
  - Do you have a Goal, set # of patients the key team must enroll in Patient Portal?
  - Do you offer incentives to the key team if they meet their goal?

Venice Family Clinic

MEGHAN POWERS
DIRECTOR OF QUALITY IMPROVEMENT
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: 30ish
- Date Portal First Went Live: 2015
- Portal Vendor: Next MD
- Target Population the First 6 Months: Adult Diabetics & Teens

Portal Functions and Workflow

- Appointment Request
  - Who gets this portal task? Call Center
  - What do they do with it? They communicate with the patient to schedule an appointment
- Medication Refill Request
  - Who gets this portal task? Not currently live
  - What do they do with it?

Portal Functions and Workflow

- Appointment cancelation
  - Call center
  - Cancel patient's appointment

- Medication Question
  - Portal group, sorted or handled by Dr. Loeza
  - Forward to provider or appropriate staff member (followed up with an e-mail reminder)

Portal Workflow

- What is working…
  - Appointment requests
  - Select providers using portal to communicate with patients (outgoing messages)

- What is not working…
  - Labs
  - Incoming messages

- One question I have for the group…
  - Strategies to test and resolve technical issues

San Mateo Medical Center

BRENDA MACEDO

PCMH TRANSFORMATION STRATEGIST

BMACEDO@SMCGOV.ORG

650-578-7133

NIA JOHAR

PCMH COORDINATOR

NJOHAR@SMCGOV.ORG

650-573-4721 EXT 804721

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

Portal Functions and Workflow

- Appointment Request
  - Who gets this portal task? NA
  - What do they do with it? NA

- Medication Refill Request
  - Who gets this portal task? NA
  - What do they do with it? NA

Portal Workflow

- What is working…
  - Lab/Radiology results viewing
  - Visit summary viewing

- What is not working…
  - Strategies of expanding features to offer more usability to patients
  - Ability to spread to Teen population

- One question I have for the group…
  - Diversity in implementations, management around language limitations and management of the single operators receiving messages, volumes, decision and distribution to multiple teams/staff

Contact Us

meaghan@careinnovations.org
Meaghan Copeland
Program Coordinator

jimmeyersdrph@gmail.com
Jim Meyers, DrPH
Coach

Questions?