

Spreading Solutions That Work
Patient Portal Program

Idea Sharing
Webinar #2
Enrollment and
Password Reset

6/8/17

Welcome



Meaghan Copeland
Program Coordinator



Jim Meyers, DrPH
Coach

Housekeeping

- ❖ Webinar is being recorded and will be emailed with slides
- ❖ Line is muted
- ❖ Use chat box for questions

Agenda



- Idea Sharing Webinar Format
- Announcements
- Finish Up “Workflows” – San Mateo Medical Center
- Common Enrollment and Password Reset 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



- July 13: Idea Sharing Webinar #3: Options for a Successful Training
- Aug 10: Idea Sharing Webinar #4: Dashboards

Patient Portal Workflow

FINISHING UP FROM LAST TIME



San Mateo Medical Center

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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



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



Patient Portal Enrollment and Password Reset

COMMON APPROACHES AND RESOURCES

What Do We Know



- “Getting Through The Door”
- Automate as much as possible
- Linkable videos and FAQ docs
- Resources:
 - Enrollment Staff Guides, Policies and Procedures
 - Landing Page Examples
 - Forgotten Password Guides and Videos
 - Landing Page Examples
 - Welcome Letter and Sign-up Document Examples

Grantee Experiences

**PLEASE TRY TO STAY UNDER 5
MINUTES PRESENTATION TIME**



San Mateo Medical Center
A County System of Healthcare

San Mateo Medical Center

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PCMH COORDINATOR

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Portal Enrollment



- What we do now: When a patient tells our front staff that they are interested in the portal we send a temporary username and password via email that must be reset after logging in for the first time.
- Do you auto enroll all new members? No
- Do you have a plan to allow online enrollment? Not currently



Portal Password Reset



- What we do now: Reset online, call the MITS department for support or if in clinic a front staff PSA can help them.
- Do you have any videos or FAQs on how to reset password? No Videos but patient who sign up for the portal in clinic receive a document demonstrating how to reset their password.
- Do you have a plan to allow online password reset? Ecw allows the patient to reset online password if they know their security questions that they've set up previously.

Portal Enrollment and Password Reset



- What is working...
 - Sending out the enrollment link when patient already has email on file
- What is not working...
 - Gathering emails
 - Easily accessible portal sign up
- One question I have for the group...
 - Does anyone utilize volunteers or have a help desk to help patients create email accounts? If so, what have been your learning outcomes from either?



**Northeast Valley
Health Corporation**
a californiah⁺health center

Northeast Valley Health Corporation

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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



**Northeast Valley
Health Corporation**
a californihealth⁺ center

Portal Enrollment



- What we do now:
- Pts. who visit the HC are given an informational pamphlet on the portal; token and enrollment assistance is offered.
- Do you auto enroll all new members?
- No, non enrolled pts. are informed at each visit.
- Do you have a plan to allow online enrollment?
- No, we are concerned about inappropriate access and prefer to see the "whites of their eyes"
- to provide token/temp credentials for
- enrollment.



**Northeast Valley
Health Corporation**
a californihealth+ center

Portal Password Reset



- What we do now: Pts. who visit the HC are given an informational pamphlet on the portal; token and enrollment assistance is offered.
- Do you have any videos or FAQs on how to reset password?
- No video yet. Video software purchased to develop short in-service modules. FAQ to reset password in planning stage.
- Do you have a plan to allow online password reset?
 - If yes, how do you verify identity?
- Our Nexgen portal currently has online password reset capability. Pt. is identified by 3 criteria: last name, email and DOB.



Portal Enrollment and Password Reset



- What is working...
 - Informing pts. about the portal
 - Offering tokens
 - Handing out informative brochures
 - Creation of Member Services Dept.
- What is not working...
 - Not enough pts. engaged in bidirectional portal messaging. Calling the Call Center and clinics instead. Activity reports not available to show total portal usage.
 - Technical limitations (tokens)
 - Lag in message turnaround time
- One question I have for the group...
 - What is the most effective marketing method used
 - to motivate the patients to use the portal?
 - What steps have you taken to get full engagement from your staff? (Providers)





Planned Parenthood California Central Coast

YOLANDA ROBLES

VP OF CLINICAL OPERATIONS

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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 Enrollment and Password Reset



- What is working...
 - Working with Charlie to create reports to capture Otech enrollments
 - On track with our plan to roll out portal re-launch
- What is not working...
 - Identifying all of the URLs in NextGen file maintenance to update
 - Patients get assigned to wrong Planned Parenthood practice.
- One question I have for the group...
 - Does anyone have instructions on resetting Passwords in NextGen?



Portal Enrollment



- What we do now: Front desk staff enroll at the time of their appointment or they are instructed to self enroll on Otech kiosk in patient lobby.
- Do you auto enroll all new members? No
- Do you have a plan to allow online enrollment? Yes, we are working to launch this on June 19th with our refreshed website landing page.



Portal Password Reset



- What we do now: Password gets reset by health center staff at the time of their appointment or they contact the Call Center to have an agent reset.
- Do you have any videos or FAQs on how to reset password?
Not yet but it is part of our work plan for second part of grant year
- Do you have a plan to allow online password reset?
 - Not yet





UMMA Community Clinic

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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 Enrollment



- What we do now:
 - Patient Care Coordinators, web enable patients during registration, via phone and at times during check out.
 - Operators, web enable patients via phone but its not consistent.
- Do you auto enroll all new members?
 - No
- Do you have a plan to allow online enrollment?
 - No, but am interested to learn more about this process



Portal Password Reset



- What we do now:
 - No, requests have been made to reset passwords.
- Do you have any videos or FAQs on how to reset password?
 - No, but am interested to find some short quick videos or what other clinics are doing.
- Do you have a plan to allow online password reset?
 - If yes, how to you verify identity?
 - Not sure, but am interested in learning more about this process.



Portal Enrollment and Password Reset



- What is working...
 - Patient Care Coordinators are becoming more and more familiar and comfortable with web enabling patients during check in or over the phone.
 - Patient Care Coordinators are identifying key words regarding when to tell the patient more about Patient Portal and its benefits, which in turn help with Enrollment.
- What is not working...
 - Patient Care Coordinators tend to be busy throughout the entire day.
 - Patient Care Coordinators don't always have the opportunity to provide additional information or promote the Patient Portal to every patient that walks through our doors, time.
 - Continuous training
- One question I have for the group...
 - How do you do this and do you offer incentives to your staff to get most patients on Patient Portal?





Venice Family Clinic

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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



Portal Enrollment



- What we do now: Front desk issues token and volunteers (healthcare navigators) in the waiting room assist patients with enrollment
- Do you auto enroll all new members? No
- Do you have a plan to allow online enrollment? No



Portal Password Reset



- What we do now: Staff informs patient they can self reset with security questions. If the problem isn't not resolved, front desk or call center resets password
- Do you have any videos or FAQs on how to reset password?
 - No
- Do you have a plan to allow online password reset? No
 - If yes, how to you verify identity?



Portal Enrollment and Password Reset



- What is working...
 - Volunteers are a great resource. Motivated & great with technology
 - Front desk is consistent in issuing the token
- What is not working...
 - Technical support (password, troubleshooting, etc.)
 - Volunteer availability can be seasonal and varies across sites.
- One question I have for the group...
 - Who handles technical issues with the portal? Do you limit the scope of questions they can handle?



Contact Us



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Questions?

