Spreading Solutions That Work
Patient Portal Program

Idea Sharing
Webinar #3
Options for Successful Training

7/13/17
Welcome

Jennifer Wright
Improvement Advisor

Meaghan Copeland
Program Coordinator

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

• Aug 10: Idea Sharing Webinar #4: Dashboards

• Sept 14: Idea Sharing Webinar #5: Overcoming Language Barriers

• Oct 12: Idea Sharing Webinar #6: Vendor Partnerships
Lessons From The Field
Common Themes in Training

• Let videos (and their links) help you with simple training
  – Call centers love the videos – they can text the patient a link
  – Volunteers in the waiting room love the videos

• Make portal training part of onboard training
  – Share where “just-in-time” videos are located

• There is no training as good as high volume use
  – Expect to retrain until overall portal use becomes a daily routine

• Survey and train to meet real need

• KEY: If you repeat training, video it
Resources

• Videos and Guides on How to Make Simple Training Videos

• Patient Portal Training Resources
  – Examples of “how to” videos
  – Portal landing page examples

• Provider/Staff Training Resources
  – Work guides – task sheets for portal volunteers
  – Example portal tip sheets for providers
  – Example training courses and “just-in-time” videos
  – Written portal guides for staff

• Idea Sharing Webinar Recordings on Training Ideas
Resources Shared Today

- Northeast Valley Health Corporation (Vallarie)
  - Provider “how-to” slides on portal tasks (with screenshots)
  - Provider/Staff “how-to” slides on enrolling patients on the portal (with screenshots)

- Planned Parenthood California Central Coast (Yolanda):
  - An example marketing handout – business card type
  - Example marketing posters
  - Example portal satisfaction survey to patients with results
Grantee Idea Sharing

Please keep comments under 5 minutes
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
Patient Training: Now and Future

• What Patient Portal Training Do You Do Now for Patients?
  – If the patient needs training right now:
    • Currently, we do not provide any patient training. Please share your ideas.
  – Permanent - long term training plan in place now:
    • Currently, we do not have a plan, we are looking into how other clinics do this and what they have put in place.

• What Patient Portal Training Do You Plan in the Future for Patients?
  – Currently, we do not have a plan, we are looking into how other clinics do this and what they have put in place.
What Patient Portal Training Do You Do Now for Providers and Staff?

- If the provider or staff member needs training right now:
  - Our providers are not trained as they do not have requests assigned to them directly through patient portal.
  - Some of our support staff such as frontline staff, operators and few back office are the ones mainly utilizing Patient Portal.

- Permanent - long term training plan in place now:
  - As we look into additional training catered to UMMA’s workflow we will gradually train all staff including providers.

What Patient Portal Training Do You Plan in the Future for Providers and Staff?

- Currently, we do not have any trainings, we are looking for ideas.
• What is working…
  – We have not received too many requests from patients via the Patient Portal that my frontline staff has not been able to address.

• What is not working…
  – UMMA does not have all staff trained across all depts.
  – UMMA does not have a training module.
  – UMMA has not put this in our daily workflow process for back office and providers.

• One question I have for the group…
  – Provider Specific: Do providers have additional admin to f/u on all PP related messages. How much time is allotted? Do these visits/messages count towards the providers productivity numbers (productivity goal) set by the organization?
MAITE MARTIN
DIRECTOR HEALTH CARE OPERATIONS
PATIENT PORTAL TEAM LEADER
MAITEMARTIN@NEVHC.ORG
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
Patient Training: Now and Future

• What Patient Portal Training Do You Do Now for Patients?
  – In-person one-on-one via the portal ambassador at time of enrollment
  – Member Services help desk provides additional phone support with general navigation

• What Patient Portal Training Do You Plan in the Future for Patients?
  - Future plan is to create a “how to” video tutorial on our website
  – Create a one page “how to” handout to be given at time of enrollment
Provider/Staff Training: Now and Future

• What Patient Portal Training Do You Do Now for Providers and Staff?
  – Portal Response Teams at each site
  – Schedule training with Clinician Informaticist as needed
  – Director of Ops & Special Projects Admin goes out to sites and trains select members of the Portal Response Teams

• What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  – Create webinars and self teaching tutorial to be made available via out intranet and can be accessed by all staff
The Good, The Bad...

- **What is working...**
  - In-person training individualized and group
  - Developed training materials

- **What is not working...**
  - Staff manpower
  - Trainer manpower
  - Bandwidth

- **One question I have for the group...**
  - Has anyone created an internal “how to” video tutorial for staff and patients?
San Mateo Medical Center

NIA JOHAR
PCMH COORDINATOR
NJOHAR@SMCGOV.ORG
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
What Patient Portal Training Do You Do Now for Patients?

- If the patient needs training right now:
  - If patient is in clinic they are offered a printout for username and password

- Permanent - long term training plan in place now:
  - Call the number if help is needed and questions will be answered.

What Patient Portal Training Do You Plan in the Future for Patients?

- Our desire is to increase enrollment and have a possible volunteer group that can assist patients in the clinic with their portal questions.
- Interested in learning more about training videos
• What Patient Portal Training Do You Do Now for Providers and Staff?
  – If the provider or staff member needs training right now:
    • No current staff training in place
  – Permanent - long term training plan in place now:
    • First roll out: all staff was trained on how portal worked, how enrollment works and how to enroll, and education on active portal features

• What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  • Roll out a training based on the functions that are turned on to the appropriate staff members
The Good, The Bad...

• What is working…
  – Broad scale questions can be answered by a staff member when patients call the number they are given

• What is not working…
  – Front office staff has less time to fully guide patients through the portal
  – Need staff training on current functions of the portal

• One question I have for the group…
  – How have you allocated time for a staff training? Have you held separate trainings depending on workflows or a single staff training?
Planned Parenthood California
Central Coast

YOLANDA ROBLES
VP OF CLINIC OPERATIONS
YOLANDA.ROBLES@PPCENTRALCOAST.ORG
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.
Patient Training: Now and Future

• What Patient Portal Training Do You Do Now for Patients?
  – All of our health centers do verbal registration or self registration, both are opportunities to inform patients of portal and a token is given to those who want to participate. Patients are given instructions and told to login while waiting in patient lobby.
  – MAs assist target population with login and first secured message.

• What Patient Portal Training Do You Plan in the Future for Patients?
  – All patients will either be coached through first login or given a brochure with instructions to login at their convenience.
Provider/Staff Training: Now and Future

• What Patient Portal Training Do You Do Now for Providers and Staff?
  – Currently only centralized Case Management staff send or respond to secure messages. They get one on one training by our Clinical Informatics Specialist.
  – Support staff (MAs and reception staff) get trained to enroll and help target population send their first secured message
  – Providers are asked to encourage patients to look for lab results in portal

• What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  – Incorporate portal into new employee orientation
  – Evaluate ability for all providers to send/receive messages
The Good, The Bad...

• What is working…
  – Invest in portal branding
  – Report monthly on metrics and set up incentives

• What is not working…
  – Patients who enroll through Otech are not getting MyCare email.
  – Portal goes down

• One question I have for the group…
  – If you are on NextGen, are you interested in collaborating to develop an app?
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
Patient Training: Now and Future

- What Patient Portal Training Do You Do Now for Patients?
  - If the patient needs training right now:
    - Healthcare navigators are available in the waiting room to orient the patients to the portal and its functions
  - Permanent - long term training plan in place now:
    - We would like to expand training to include classes for patients.

- What Patient Portal Training Do You Plan in the Future for Patients?
  - Continue with healthcare navigators, more online resources (videos, etc.), and scheduled classes.
Provider/Staff Training: Now and Future

- What Patient Portal Training Do You Do Now for Providers and Staff?
  - If the provider or staff member needs training right now:
    - We have completed department trainings, and staff are oriented by EHR trainers during onboarding
  - Permanent - long term training plan in place now:

- What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  - Ongoing portal trainings, Identify super-users, include structured training in the onboarding process
The Good, The Bad...

• What is working...
  – Sharing portal functions with frontline staff
  – Call center and coordinators learning and troubleshooting as they go

• What is not working...
  – Not a lot of portal expertise at front desk
  – Only a handful of providers utilizing portal as a tool to communicate with patients

• One question I have for the group...
  – How do you train on the portal during onboarding
Questions?
Contact Us

meaghan@careinnovations.org
Meaghan Copeland
Program Coordinator

jennifer@careinnovations.org
Jennifer Wright, MPH
Improvement Advisor

jimmeyersdrph@gmail.com
Jim Meyers, DrPH
Coach