Health Services
LOS ANGELES COUNTY

Primary Care
All Hands on Deck for MyWellness
Portal Toolkit

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Introduction to MyWellness Portal for Primary Care

The MyWellness patient portal is an online website and app which helps our patients manage their care remotely. The portal makes it easier for our patients to be fully engaged in their own care – 24 hours a day. The portal saves everyone time and hassle.

Our patients can check their lab and radiology results, view their provider notes, request appointments, request refills, and message their clinical teams. Patients don't have to spend time or money going to medical records, as most of their health record is now online. When patients read their health record, it actually makes their healthcare safer!

When we survey our patients about the MyWellness portal, they tell us:
"I wish I had known about the patient portal, this is a great tool"
"I spend time checking Facebook, I would rather check on my health"
"My daughter works but she helps me manage my health. This would be a great reference if she can't come to my appointments."

This tool may help clinics and providers decrease walk-ins and improve efficiency around phone calls, refills, questions about results, and more. A more efficient clinic means happier patients and providers.

Our patients expect that they can take care of their healthcare online. Let's work together to enroll patients in MyWellness portal, and make care safer and easier for our patients.

Getting Ready for MyWellness Portal Enrollment

Before you start inviting your primary care patients to the portal as part of routine workflow, there are few preparatory steps your teams should take in order to assure that patient messages will reach your PCMH team appropriately:

- ✓ Review primary care provider and nursing pools, current set up and structure

    - o Assure accurate associations of PCPs in correct clinic / related to correct nursing pool

    - o It is important that provider and nursing assignments are up-to-date so portal messages are routed to the right team member

- ✓ Review nursing scheduling and assignments to assure adequate coverage of pools and ability to respond to incoming messages

- ✓ Make sure that teams are aware of what patients might ask (see FAQs) or see (see Screen Shots) once you invite them to enroll in the portal

- ✓ Demonstrate MyWellness portal to your primary care teams using a test patient. Go to http://dhs.lacounty.gov/wps/portal/dhs/mywellness/ and use the information to login:
    - o username: testjana
    - o password: cerner2016

Teams should be familiar with common questions and concerns that patients might have. Teams can refer to the FAQs section at the end of this toolkit and review these topics.

All patients should be encouraged to enroll in the MyWellness portal, and all team members should be involved in the effort to engage patients in their medical care via the patient portal. This is the basis of our "All Hands on Deck for MyWellness" campaign throughout primary care.

Workflow and Sample Script for MyWellness Portal Enrollment

After verification of other demographics information as part of the scheduling and/or registration process, staff should ask patients:

"May I have your email address? If it is easier for you, you can write it down. Our care teams like to be able to reach out to you more easily than by phone calling. We protect your email address just like we do your medical record."

If <u>No</u>, the patient states he/she has no email address:

"Do you have a family member or friend who helps you manage your healthcare information? I can set them up us a "proxy" for your MyWellness account. A proxy is an authorized user that has permission to access your account. They will have full access to help you manage your health information and your medical record."

If <u>No</u>, the patient states he/she has no email address and declines a proxy:

"You can create an email account for yourself and go to this website (http://dhs.lacounty.gov/wps/portal/dhs/mywellness/) and enroll using your medical record number and the last 4 digits of your social security number."

For more information about patient self-enrollment, click here.

If <u>Yes</u>:

"I'm sending you an invitation to sign up online in order to access your medical record, including your provider's notes and all of your results. You can find the invitation in your email folder. Make sure you check your Junk Mail folder in case you don't see it. The email will be sent from "MyWellness" LA County."

"When you access your email invitation, click on the link provided. You'll be asked for the answer to a challenge question. This will be the last four digits of your social security number."

Staff should use standardized Challenge Question, last 4 digits of SSN, in order to generate invitation. This way, if patients forget their Challenge Answer and call into the PAC asking for assistance, we can remind them of the answer. If no SSN available, ask the patient to select another Challenge Question (Year mother born/married/or started elementary school).

Instructions for Registration Staff to Generate Email Invitation

1. If the patient is interested **and** has an email address or desires to use a proxy's email address, the Registration Staff will:
   a. Enter the patient's Email Address- confirm by reading the email address back to the patient!
   b. Flip **MyWellness Invitation** indicator to **"Yes, Generate Invitation."**
   c. Select the appropriate challenge question (recommend using the last 4 digits of SSN)
   d. Type in the 4-digit answer

NOTE: When registering a minor, the email address of the parent or guardian should be captured in this field.
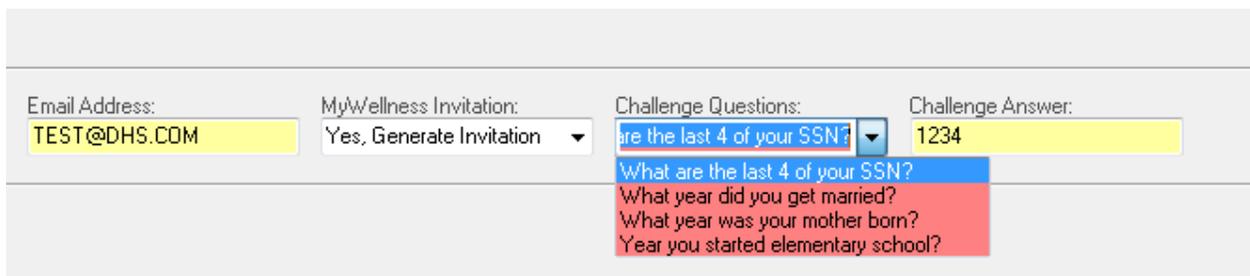
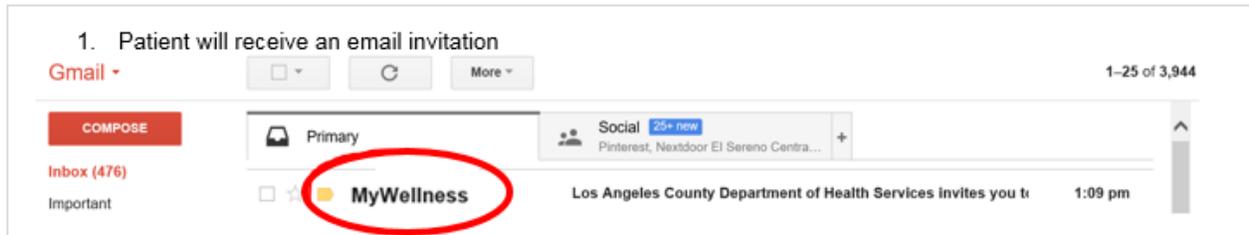| Email Address:	MyWellness Invitation:	Challenge Questions:	Challenge Answer:
TEST@DHS.COM	Yes, Generate Invitation	are the last 4 of your SSN?	1234
		What are the last 4 of your SSN?	
		What year did you get married?	
		What year was your mother born?	
		Year you started elementary school?	

After you have documented the necessary information, finish registering the patient for their appointment and click **"Complete"**.

Screen Shots of What the Patient Sees
(MyWellness Portal enrollment through email)

The patient will receive an email invitation.

1. Patient will receive an email invitation

Gmail ▾

☐ ▾   C   More ▾

1–25 of 3,944

COMPOSE

Inbox (476)

Important

☐ ☆ Primary   Social 25+ new   Pinterest, Nextdoor El Sereno Centra...   +

☐ ☆ ▢ **MyWellness**   Los Angeles County Department of Health Services invites you t⟨   1:09 pm

Dear SANDRA,

The Los Angeles County Department of Health Services is inviting you to access your electronic health record by joining MyWellness.
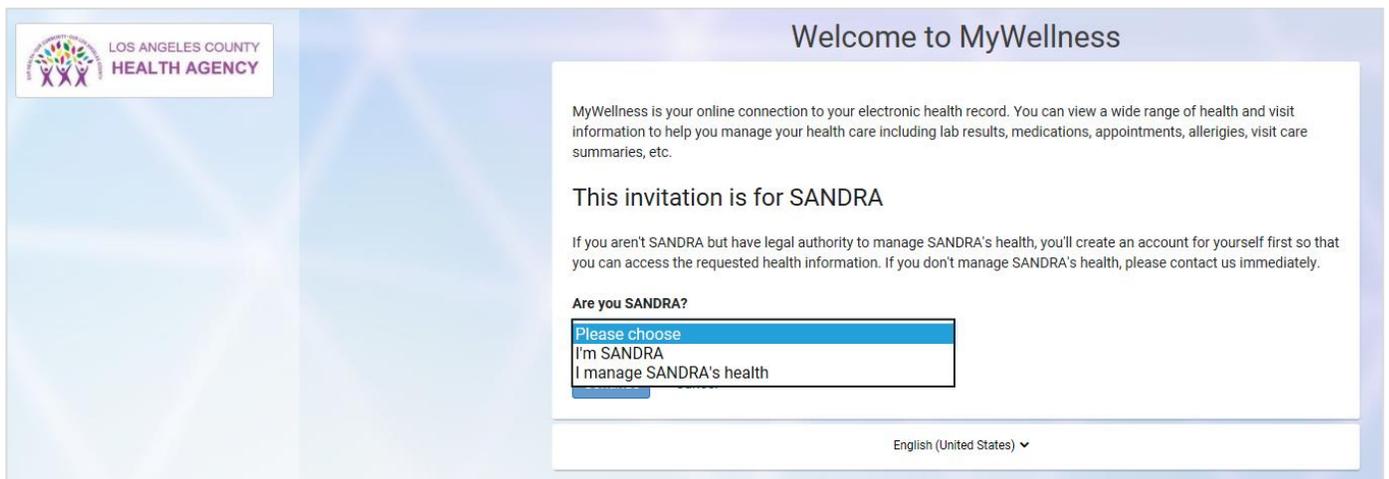
MyWellness lets you view your medical record and request an appointment. Your personal medical record has information like your lab results, visit care summaries, medications, procedures, scheduled appointments, and immunizations. To register, follow the easy steps below:

1. Click on this link: Accept Invitation to MyWellness
2. Follow the steps outlined on the page.
3. Don't forget to complete this process soon. This email invitation will expire after 90 days. We will send you a reminder before it expires. However, if you forget, contact your doctor's office to receive a new email invitation.

Once you've accepted the invitation, click on this link MyWellness.dhs.lacounty.gov to take you to your health record or login from www.dhs.lacounty.gov using the MyWellness link.

Sincerely,
MyWellness Support

LOS ANGELES COUNTY HEALTH AGENCY

Welcome to MyWellness

MyWellness is your online connection to your electronic health record. You can view a wide range of health and visit information to help you manage your health care including lab results, medications, appointments, allergies, visit care summaries, etc.

This invitation is for SANDRA

If you aren't SANDRA but have legal authority to manage SANDRA's health, you'll create an account for yourself first so that you can access the requested health information. If you don't manage SANDRA's health, please contact us immediately.

Are you SANDRA?

Please choose
I'm SANDRA
I manage SANDRA's health

English (United States) ▾

Verify Your Identity With Us

By verifying patient information with Los Angeles County Department of Health Services, you are helping us keep medical record information secure.

Complete Your Information

Date of birth

Month   **Day**   **Year**

Select ▾   [   ]   [   ]

Enter the year as 4 digits.

What are the last 4 of your SSN?

[   ]

The answer to this security verification question may have been provided when you were invited to join.

☐ **I agree to the Los Angeles County Department of Health Services Terms of Use and Privacy Policy.**

[Next, Create Your Account]   Cancel

English (United States) ▾

Already have an account? Sign in

Create an Account

All fields are required.

First name

SANDRA

Last name

ZZZZTEST

Email address

ssimmons2@dhs.lacounty.gov

Re-enter email address

Date of birth

Month   **Day**   **Year**

April ⌄   18   1985

Enter the year as 4 digits.

Gender

⌄

Username

Password

Passwords must be at least eight (8) characters long.

Re-enter password

Security question

⌄

Security answer

☐ I agree to the *Cerner Health* Terms of Use and Privacy Policy.

🔒 Create Account

Secure health identity provided by:

⊜ **Cerner**Health

Cerner Health uses a secure log in and password to access information about your health. If you don't own or control the computer you're using, turn on "private browsing" to protect your personal health information.

Using MyWellness Portal for Customer Service Recovery

Enrolling patients in MyWellness is an easy customer service recovery tool. When patients have difficulty getting medical records, lab results, refills, or knowing their appointment dates, offering and enrolling them in MyWellness can immediately address all of these concerns.

Here are some case examples of how MyWellness can serve as a great customer service recovery tool:

1. A patient has made several calls to the clinic and medical records requesting copies of her medical records without result. She decides to make a special trip to present to the clinic in person. The front desk staff encounters a frustrated and upset patient wanting to retrieve her medical records.
At the time of the initial phone call, or upon presentation to the clinic, the staff can enroll the patient in the portal and assist with navigation to help her view her records.

2. A patient calls the clinic and leaves a message asking about his lab results. On the phone with the clinic staff, he is frustrated about the long wait time it takes for someone to call him back.
Staff can help de-escalate this patient by facilitating enrollment in MyWellness so patients send messages directly to the clinic or see lab results within 72 hours.

3. A caregiver is having a difficult time coordinating various appointments and keeping track of medication changes for an elderly patient at the clinic. The caregiver often gets frustrated bringing the patient who sometimes arrives late to appointments or shows up on the wrong date.
During the patient's clinic visits, the clinic team can present the option of enrolling the patient in MyWellness portal with a proxy. Clinic staff should assist with enrollment if both the patient and caregiver agree to the proxy terms of use the patient portal.

4. A patient complains that her primary care provider didn't spend enough time clearly explaining the findings and plan of care at a recent visit.
The clinic staff or PCP can invite the patient to enroll in MyWellness so that she has access to her provider's notes and can message her provider and care team directly.

Tracking Your Progress on Invites and Enrollments

We hope to see an increase of 10% above each clinic or site's current baseline, or at least 25% of our empaneled patients enrolled in the MyWellness Portal by the start of January, 2019.

In order to track your site's progress, you can look at the MyWellness Dashboard found on the DHS website. <u>Go to the link below to review your site and individual clinic statistics for invitations and enrollment by month</u>.

MyWellness Statistics

You can view DHS efforts overall and by individual site (see tab "Monthly 2018"), or
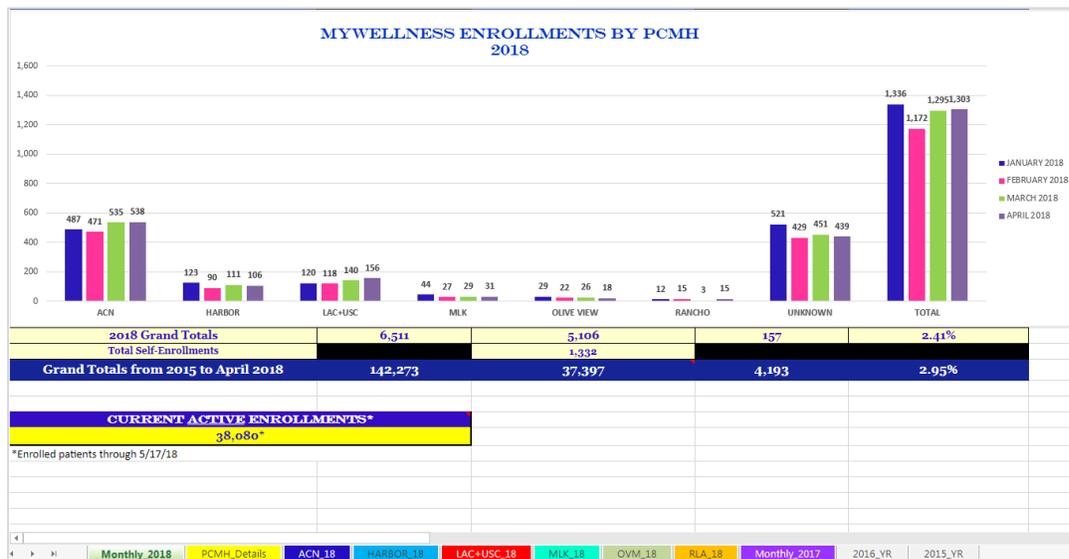
Use additional tabs along the bottom to sort by individual site and PCMH.
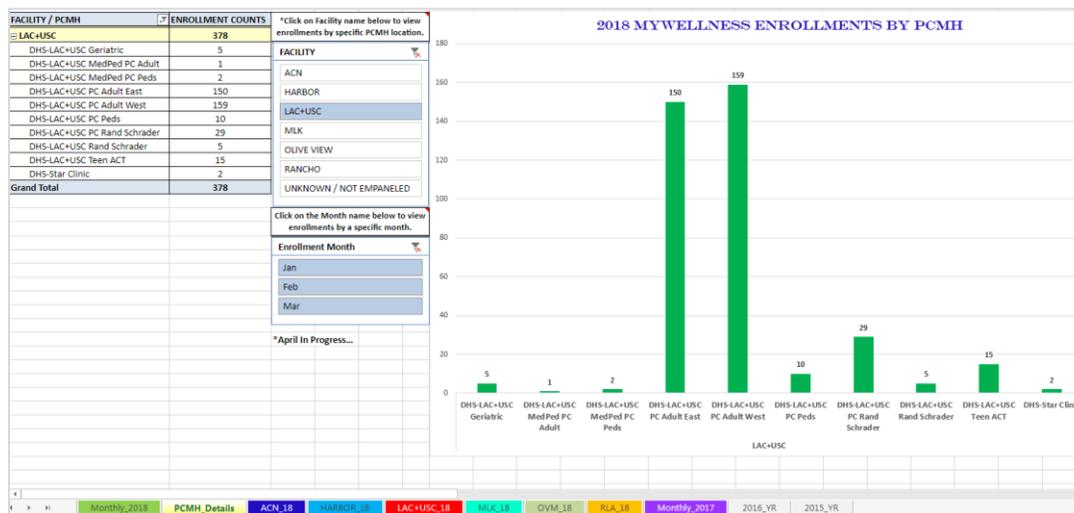
Success Stories of MyWellness Portal Usage

One of my primary care patients has multiple chronic conditions, does not have phone, and lives in his car. The only way he has been able to access his care team when he is outside of clinic is via the MyWellness message feature. He goes to his local library to communicate about both his physical and mental health concerns. He also gives shout-outs to our clinic team. He says that MyWellness portal helps him "feel connected to our clinic." He says that he is "more easily able to express himself via message feature than in person." He also uses the MyWellness portal to communicate with specialty clinics.

- Dr. Manuel Campa, a primary care provider at Primary Care Adult West LAC+USC

A primary care patient went to lab for results. The lab told him that he should go to our clinic for his results. He came to our clinic angry and frustrated. He was told that while we cannot provide him his results, we could assist him in enrolling in MyWellness portal. He enrolled, viewed his labs, and came back to clinic three weeks later. He expressed how grateful he was for being able to see his labs without having to go to medical records and pay for them.

- Ivania Cervantes, a clerk at Primary Care Adult West LAC+USC

Frequently Asked Questions

Question: *Can an adult patient use a "proxy" (designate another adult to be able to login to their MyWellness account for them)?*

Answer: **Yes**. This step is reflected as an option on page 6 above.

Question: *Can adolescents or their parents view their health records and other information on the portal?*

Answer: **No**, the portal is not available for our 12-17 year old patients.

Question: *Can HIV+ patients view their health record and other information on the portal?*

Answer: **Yes**, primary care HIV notes are available. For a complete list of patient viewable note types displaying in the portal and additional material around OpenNotes, please use the following link: OpenNotes Documentation

Question: *Can providers and nurses invite patients to join MyWellness portal as a part of their workflow?*

Answer: **Yes!** See links on page 14 for nursing, providers, and therapists.

Question: *If the patient is experiencing technical difficulties with their account, who can they contact?*

Answer: The log-in support team at 877-621-8014.

For more FAQs, see the attached MyWellness FAQ document or click the following link: MyWellness FAQs

For more information:

[Patient Portal Comprehensive Guide](#)
[Patient Portal Quick Tips and Tricks Guide](#)
[MyWellness-Inviting a Patient-Registration Staff Job Aid](#)
[MyWellness-Inviting a Patient-Providers and Therapists Job Aid](#)
[OpenNotes Documentation](#)
[MyWellness FAQs](#)