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Patient Portals: Pathway to Patient Engagement and an Enhanced Patient Experience

A Carefx White Paper

A Letter from Andrew Hurd, CEO, Carefx Corp.

The stakes are high. Hospitals, health systems, integrated delivery networks (IDNs) and health information exchanges (HIEs) already accustomed to tackling quality, safety, efficiency, cost and access now face a new set of challenges—from disconnected communities, providers and patients and lackluster population health management to slashing the number of invasive procedures, readmissions and extended hospital stays.

Under pressure to achieve patient-centered, high-performance, accountable care, a growing number of hospitals, systems, IDNs and HIEs have found a new solution: meeting meaningful use requirements and engaging patients, not with a formal payer- or government-sponsored Accountable Care Organization (ACO), but with a flexible, scalable patient portal that promotes prevention, wellness and patient engagement through focused, sustained patient-provider interaction.

The strategy: Connect with patients and enhance patient-provider collaboration by inviting patients to check their health status, track medications, arrange office visits, update health information, connect with medical record information, and obtain discharge instructions and plans for medication and post-op care. At the same time, bring providers into a patient care dialogue by enticing them to send patients test results, medication updates, alerts, reminders and educational resources.

Developed by Carefx, a subsidiary of Harris Corporation, this white paper offers guidance on patient portal features, functions and benefits. It focuses on how the optimum patient portal can create an efficient communications environment where providers can share test results with patients and patients can easily view and manage personal health information.

The benefits of such portals are far-reaching—from higher patient involvement and heightened communication among patients and providers, to greater clinical integration. HCOs savvy enough to implement patient portals in the early days of the evolution toward patient-centered, accountable care will surely see the results – in lowered readmission rates, shorter patient stays, fulfillment of meaningful use, enhanced hospital throughput, population health management and patient-provider collaboration.

Carefx is pleased to provide you with this patient portal white paper. We're available to answer your questions and concerns about patient portal and support you in making a patient portal decision. Please find additional information at www.carefx.com/patient-portal, or contact us at info@carefx.com or 480-833-5010.

Sincerely,

Andrew Hurd
CEO
Carefx Corp.

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Patient Portals: Pathway to Patient Engagement and an Enhanced Patient Experience

“In an ideal scenario, the patient portal helps move patients into ambulatory care, avoiding steep inpatient and readmission costs, simplifies care through provider-patient efficiency, and sustains a patient-centric focus needed in medical homes and accountable care.”

Eric Leader
Vice President
Technology Architecture
Carefx

Healthcare organizations (HCOs) are under unprecedented pressure to deliver on high quality care, meaningful use, a platform for accountable care and direct connection of patient populations into a system of care. But how can HCOs help patients manage individual care plans and stay as healthy as possible with little or no patient-provider communication around clinical questions, appointment scheduling and discharge instructions? How can they overcome the inevitable clinical and financial consequences of readmissions, extended hospital stays and duplicative care?

HCOs are playing for high stakes. If they successfully implement and use certified electronic health records (EHRs), they can receive some of the \$334 billion available through American Recovery and Reinvestment Act (ARRA) funds. If they integrate providers into the provider-patient dialogue, they can move closer to accountable, high-value healthcare and higher levels of reimbursement. And if they engage and involve patients, they can improve chronic care management and engage patients for a life-long, collaborative relationship. The patient portal offers a partial means to achieve these goals.

The best patient portals offer hospitals, health systems, IDNs and HIEs the opportunity to engage communities and providers in care plan management and health maintenance. Using a patient portal, HCOs can better integrate patients and providers, achieve meaningful use, build a foundation for more integrated and accountable care, and boost efficiency by allowing patients to take at least some of the time-consuming tasks of pre-admission.

“In an ideal scenario, the patient portal helps move patients into ambulatory care, avoiding steep inpatient and readmission costs, simplifies care through provider-patient efficiency, and sustains a patient-centric focus needed in medical homes and accountable care,” says Eric Leader, Vice President, Technology Architecture, Carefx.

With functions that include clinical messaging, patient demographic updating, electronic prescription requests and refills, test result alerts, automatic appointment scheduling and secure provider posting of medical information, the patient portal has the potential to:

- Streamline processes across the continuum of care
- Motivate patients to manage medications, care plans and admissions
- Enhance population health management
- Reduce costly readmissions
- Facilitate ambulatory care expansion
- Improve health system brand recognition via patient outreach

Patients come first, but the best patient portals are designed around the lives, workflow needs and priorities of both patients and providers. Providers who use a patient portal gain a newfound power to streamline scheduling, update patient care plans, accelerate the pre-admission process and slash the costs of admissions and readmissions.

Patients, in turn, can tap into a portal to enter health history, monitor test results, access provider-driven education and collaborate with clinicians—all in a cocoon of privacy and security. Patients can monitor their health status from pre-admission to post-discharge via education materials, links and secure messages from their providers.

The time is right. “The population that’s beginning to consume care is used to a social networking communication style—text-based, asynchronous and bi-directional,” says Leader. “They will expect the same from their physicians. If they can’t get it, they’ll seek out new providers.”

The best patient portals orchestrate an electronic dialogue between patients and providers via secure messaging. Patients can schedule appointments and view provider-posted test results, reminders and alerts, while providers can update medication lists and test results for patient viewing.

“The long-term strategy is for providers to work with patients more collaboratively, free from the time-consuming burdens of telephone phone tag,” says Leader. “With a patient portal, physicians and patients can work asynchronously, sending messages one day and receiving responses the next.”

Just as important are required portal interfaces, including native patient demographics, clinical results, third party bill pay services, native electronic medical records (EMRs), practice management systems, eligibility, pharmacy, disease education and vocabulary services.

The patient portal revolution is already on. In just two years, Sharp Rees-Stealy Medical Centers, a cluster of 19 facilities in San Diego County, has registered some 58,000 patients—a quarter of its patient population—for its mySharp (<http://www.sharp.com/mysharp/>) patient portal. Built by a coalition of Sharp professionals from operations, nursing, medicine, clinical information technology and patient services, the portal offers patients the opportunity to better manage their own health through a variety of patient-focused features, including appointment scheduling, access to online lab results and secure messaging with physicians.

How a Patient Portal Works

Charlene, a 50-year-old registered dietician, learned that the local community hospital had developed a patient portal designed to help its patients schedule procedures, communicate with providers and better manage their own health. Charlene decided to register with the portal so she could request an appointment, check on the cost of an inpatient procedure and verify insurance coverage.

Once the hospital scheduled Charlene for her inpatient procedure, it entered her into its clinical information system as a known patient. Charlene submitted pre-admission information such as medical history, which ultimately became part of her clinical record. She also used the portal to access the results of recommended lab tests, along with her physician’s interpretation and commentary. After Charlene completed her inpatient procedure, she viewed results and generated an electronic copy for import into her Microsoft HealthVault personal health record (PHR).

Eventually, Charlene will use the hospital’s patient portal to receive up-to-the-minute information on how multiple professionals and organizations—from imaging centers and physician practices, to pharmacies and labs—are using a care plan to better manage and treat her conditions.

“Experiences like Charlene’s will become increasingly typical as patient portals proliferate, improving care quality, efficiency and timeliness,” says Leader. “Patients will review the results of tests and procedures more quickly and become full participants in their care plan, a boon to treating the chronic conditions that consume an extraordinary percentage of healthcare costs.”

The Push for Patient Engagement

Patient portals are more than features and functions. They must deliver value by helping hospitals, health systems, IDNs and HIEs engage patient populations in personal health management and maintenance and streamline patient-provider communications. Doing so helps HCOs build a foundation for accountable care, meet meaningful use requirements, and achieve high quality care across the enterprise and care spectrum.

A patient portal offers the benefit of more engaged, involved patients. As defined by the Center for Advancing Health (<http://www.cfah.org>) engagement includes “the actions individuals must take to obtain the greatest benefit from the healthcare services available to them.”

In contrast to compliance, which suggests a patient obey a provider’s directive, engagement means a patient is “involved in a process through which he harmonizes robust information and professional advice with his own needs, preferences and abilities in order to prevent, manage and cure disease,” says CFAH.

HCOs play a critical role in engagement as they work to “meet and exceed patients’ expectations of both the transactional and transformational aspects of care to create patient engagement,” according to Gallup, a research firm involved in measuring varied forms of engagement. To do so, HCOs must move beyond a focus on satisfaction or loyalty scores to a place where patients are “emotionally attached to the provider’s brands or services. They are engaged.”

But what’s an HCO to do? Patients may need to become as accountable as HCOs, according to Erica Drazen, writing in “Preparing for Accountable Care: The Emerging Role of Health IT in Engaging Patients” (http://www.csc.com/health_services/insights/67074-preparing_for_accountable_care_the_role_of_health_it_in_engaging_patients). That, in turn, means that physicians, hospitals and vendors must persuade patients to regularly use PHR systems, mobile health monitoring devices and other high-tech aids designed to improve health.

By partnering with patient-focused health IT vendors, HCOs can:

- Target, educate and motivate patients and families who are most likely to benefit from IT-driven engagement, but least likely to consistently use it to manage their health.
- Focus on ease of use, convenience and practical features designed to make patients want to further engage with a hospital, health system, IDN or HIE through IT.
- Offer patients real-time access to their health information, while teaching both patients and providers how to use and manage the information to maintain good health and improve chronic care management.
- Educate patients and providers on a full range of IT-driven solutions: secure messaging, patient portals, telehealth applications, remote monitoring devices and Web-based virtual visits.

Equally important are non-technological solutions to engagement, including the creation of a pact or agreement “about roles and responsibilities that recognizes mutual interdependence of the parties (providers and patients). Neither can solve the problem without the other.”

As delineated by the Center for Advancing Health (http://www.pcpcc.net/files/Supporting_Engagement_PCMH.pdf), the Patient-Clinician PACT offers a list of 10 behaviors organized into the categories of sharing information, shared decision making and responsibility for care that support transparency and active engagement by patients and clinicians.

A Guide to Patient Portals

If patient engagement is the goal, patient portals offer a means to achieve. But not all patient portals are created equal. They differ dramatically in features, functionality, usability, transparency and benefits to patients and providers. Following are criteria for selecting a patient portal solution that fits your HCO's needs.

One: Make sure that the portal's features and benefits cover the bases

Key issue: Does the portal have the capabilities and features needed to address multiple goals and objectives?

The portal should be able to deliver on promises related to meaningful use certification, patient-provider integration, enhancement of clinical workflow and 360 degree views of the patient.

Providers will fulfill meaningful use requirements only if a portal offers patients reminders for follow-up care, electronic copies of health information and discharge instructions, access to reports and test results and educational resources. (For more on meaningful use see the appendix at the conclusion of this white paper). Among the primary meaningful use requirements a portal can fulfill for patients are these:

- Maintain problem list and health conditions: 170.302 (c/d/e)
- Enter vital signs: 170.302 (f)(1)
- Calculate body mass index: 170.302 (f)(2)
- View tests results: 170.302 (h)
- Review education resources made available through the EHR: 170.302 (m)
- Audit patient and provider access and use: 170.302 (r)
- Receive notifications of test results: 170.304 (d)
- Process patient information quickly: 170.304 (g)
- View clinical summaries: 170.304 (h)
- Exchange clinical information and summary records with providers: 170.304 (i)
- Obtain electronic copies of information and discharge instructions: 170.306 (e)(d)(1)

Government mandates to demonstrate meaningful use of EMRs by 2012 or face penalties have only heightened pressures on providers. The average 500-bed hospital could face annual reductions in Medicare reimbursement rates equivalent to \$3 million to \$6 million annually for failing to meet meaningful use requirements.

Equally important, the portal should support an HCO in its transition to the patient-centered medical home (PCMH) and integrated, high-performance, accountable care. That requires clinical integration, population health management, secure messaging and virtual health visits. Of course, nothing is set in stone.

"Even providers and payers involved in pilot programs are struggling to understand the function, scope and metrics of ACOs," says Leader. "If the strategic goal is a platform for collaboration between providers and patients within an ACO and PCMH, it makes sense to approach a portal incrementally. That way, patient portal developers can better respond to trends and embrace the lessons learned of accountable care."

Patient-provider integration calls for a portal to deliver a secure messaging platform for patients to ask questions and access reports, test-results and provider-selected education materials. Streamlined provider workflow demands that a patient portal offer electronic appointment requests, prescription refills, test result posting and delivery notifications and confirmations.

“A patient portal builds loyalty between patients and providers,” says Leader. “Patients have the opportunity to interact with a higher level of information—from lab and radiology results to educational material delivered in the context of an event.” For example, if cholesterol results are out of range, a physician can send the patient educational materials on how to better manage cholesterol.

In summary, the ideal patient portal will offer—or have plans to offer—these functions to fulfill the goals of meaningful use, patient-provider integration and clinical workflow improvement:

- Reminders, notifications and confirmations
- E-copies of health information, discharge instructions
- Posting of and access to reports, tests results
- Patient education
- Patient-provider communication via secure messaging
- Electronic appointment requests
- Prescription refills

Example #1 Patients Self-Register via Patient Portal

Sixty-three-year-old Jenna wants to get more involved in documenting her personal health information to streamline care and enhance her one-on-one time with her primary care physician. Whether she’s scheduled for an office appointment, ambulatory test or procedure or inpatient surgery, she sees the benefit of providing updated information for her physician to review.

Using a patient portal offered through a local community hospital, Jenna is able to register as a new user and enter and update demographic information, including her preference to communicate in Spanish. She documents her lifestyle as a non-smoking, vegetarian who exercises at least 45 minutes a day and takes five prescription medications.

The result: Jenna’s physician can access updated patient information at any time or place, while Jenna happily takes on a more vested role in managing her health.

Two: Address the needs and priorities of patients, physicians and practice referral coordinators

Key issue: How well does the portal solution meet the current and emerging needs of patient/consumers, providers and physician office staff?

In developing a patient portal, it pays to get input from multiple constituencies. Sharp Rees-Stealy did just that. In response to patient portal initiatives already developed by Kaiser and other southern California healthcare leaders, Sharp Rees-Stealy, in 2007, brought together a group of vice presidents and C-level executives to discuss portal features and functions.

The top priorities: integrate a patient portal with Sharp’s existing health IT systems and focus on patients’ personal health management needs by offering online access to information they would typically receive via face-to-face encounters at medical centers.

“The ideal patient portal will offer secure access – either through the Web or mobile devices – to every provider within the care continuum, ensuring that community providers and staff operate with role-based identity, access control, integrated data and decision-making tools.”

Eric Leader
Vice President
Technology Architecture
Carefx

By November 2008, Sharp Rees-Stealy began to assemble 8 multidisciplinary teams to discuss the design of patient portal features and functions. Representatives from areas such as operations, nursing, clinical IT, medicine, patient services and Sharp corporate analyzed how potential features might influence business and clinical workflow, as well as patient health status, satisfaction and engagement.

Overall, patients and consumers are eager to participate in prevention, wellness and health maintenance through appointment and refill requests and review of result and report notifications. They look for a secure portal to enter, edit and maintain personal health data, receive results and schedule appointments.

The ideal portal offers patients a low-cost, low-touch, scalable solution for service and transaction delivery, including the potential to self-manage disease, engage in self-registration, edit and update health information, connect with providers and care team members, view test results, manage medications, order and refill prescriptions, request appointments and manage bill payment.

Providers, on the other hand, turn to a patient portal to view and approve patient updates and appointment requests, send notifications and communicate with patients via secure messaging. They seek a secure platform to send results, schedule appointments and answer patient inquiries.

But communication with a single provider is only a partial solution. “The ideal patient portal will offer secure access – either through the Web or mobile devices – to every provider within the care continuum, ensuring that community providers and staff operate with role-based identity, access control, integrated data and decision-making tools,” observes Leader.

Such access will be essential as a growing number of providers collaborate with care teams to set up appointments and complete pre-appointment functions. For example, a patient portal should allow any care team member to disseminate pre-admission or pre-admit forms electronically, saving patients from having to complete forms manually and easing provider follow-up on scheduled appointments and no-shows.

“With a patient portal, physicians have a better sense of what’s going on with an individual patient and within the physician practice,” he predicts. “The portal offers physicians an unprecedented mechanism for feedback and collaboration with patients.”

Physicians will be able to add notes to lab results, identifying, for example, next steps and whether the result is positive or negative. Patients can then respond—either directly to the physician or with the office staff. Such electronic interchange will be essential as physicians enter into accountable care or patient-based organizations and qualify for incentives around collaboration and management of a care plan.

Leader counsels patient portal shoppers to dismiss EMR vendor claims of portal availability. “Such portals are typically decent but highly limited in their features and functions. Neither primary care physicians nor members of the cross-organizational care team are typically involved,” he says. “What’s needed is a scalable patient portal platform that expands to meet patient and provider needs for access, coordination and collaboration.”

Of course, not all providers are alike. Primary care physicians view and approve patient-entered information, answer patient questions via secure messaging and validate lab and test results before sending them to office staff for posting on the portal. Specialists are likely to do the same and also offer patients electronic discharge instructions.

And no one can neglect the critical role of physician office coordinators. Their top priority: maintain a real-time, configurable physician schedule and offer patients available time slots. Like providers, these coordinators rely on a portal to review prioritized appointment requests, schedule appointments, maintain provider calendars by handling rescheduled and cancelled appointments, and send patient appointment confirmations and notifications of test results.

“We realized that patients simply wanted a secure, easy way to manage their health online.”

Michael Sanchez

Principle
Technical Analyst & Architect
Sharp HealthCare Information Services

Example #2 Patients Request Appointments through a Patient Portal

Twenty-eight-year-old Rob was wired in every area of life—except healthcare. He was eager to find a patient portal that offered an electronically efficient way to request a preferred appointment with his physician. Using a patient portal, Rob can schedule a clinical visit that matches his personal preferences with his physician's availability. Instead of initiating a chain of time-consuming phone calls, Rob logs into the secure portal, enters a preferred appointment time into his physician's inbox, and waits for the physician office manager to respond.

The result: Rob gets a new appointment along with the ability to view and manage his other scheduled appointments.

Three: Address patients' personal health management needs

Key issue: Does the patient portal enable patients to better manage health status, including chronic disease, through features like PHR export, allergy management, health profile management, symptom assessment, care plans and reviews of radiology images, lab results and summary documents from an EHR?

The ideal patient portal invites patients and family members to view a PHR or health profile featuring information on history, allergies, lifestyle, problems and immunizations. Distinct from the hospital or health system's clinical record, the health profile and PHR allow patients to enter and update health and medical history, revise problem lists, document immunizations, identify allergies, document and describe lifestyle behaviors like exercise, nutrition and smoking, specify prescription and over-the counter medications and access a care plan offering guidelines for managing a disease or condition.

Sharp Rees-Stealy conducted several quantitative and qualitative surveys to identify preferred patient portal features and functions.

The results: patients most wanted to book appointments online, engage in secure messaging with a provider's office and view lab tests.

“We realized that patients simply wanted a secure, easy way to manage their health online,” says Michael Sanchez, Principle Technical Analyst & Architect, Sharp HealthCare Information Services. “They wanted to e-mail their physician's office with questions and concerns without having to play phone tag or wait for the office to open, and book and cancel appointments for themselves and their kids, keep track of existing appointments and even get directions to a physician's office.”

Also important to a patient portal is a proxy feature that allows a registered patient to designate a family member, social worker or home health professional who can view the patient's personal patient health information. Such features are invaluable in integrating family members who may lack the time and knowledge to track down health information into care decision-making.

Sharp Rees-Stealy offers its customers two levels of access—one for current patients and another for those whose child or dependent is a Sharp Rees-Stealy patient. Existing patients are able to e-mail their physician's office, pay bills, refill prescriptions, schedule primary care and lab appointments, manage accounts of children, spouses and relatives and view lab results and personal health information, including allergies, immunizations, heart rate and blood pressure. New patients save time by completing the patient registration process online.

“mySharp saves time for patients and providers, while offering patients more control over personal health information and confidence in their ability to manage their own health and the health of family members.”

Michael Sanchez

Principle
Technical Analyst & Architect
Sharp HealthCare Information Services

Consumers whose children or dependents are Sharp Rees-Stealy patients, including a high number of military families, have a more limited but still valuable range of portal options, including bill payment, prescription refills, primary care physician and lab appointment scheduling, updating of personal and insurance information, and viewing of lab results and selected health profile information on immunizations and allergies. Even those who aren't Sharp Rees-Stealy patients can still subscribe to and manage its e-mail newsletters, manage the account of a Sharp Rees-Stealy child or loved one and refill prescriptions.

“mySharp is all about ease of use and convenience. As patients enter the portal, they see a single screen that features their scheduled appointments, e-mail messages, lab results and outstanding bills,” says Sanchez.

“mySharp saves time for patients and providers, while offering patients more control over personal health information and confidence in their ability to manage their own health and the health of family members.”

A patient portal should have—or have plans to develop—these health profile features:

- Health and medical history
- Problem list/symptom assessment
- Immunizations
- Allergy management
- Lifestyle behaviors
- Medication management
- Patient care plan strategy

Ultimately, chronic care patients will use a patient portal to journal about a disease—CHF, COPD, diabetes, asthma – including information ranging from home medical device data to daily emotions and issues of the day, according to Leader. Multiple care team members will access the data, including, for example, alerts on out-of-range blood pressure readings and the absence of patient-entered glucose scores.

Four: Enhance communication and collaboration between patients and providers

Key issue: Does the portal provide a platform for secure, private communication between patients and providers through an e-mail-like interface and messaging?

The best patient portals offer calendars that feature recent and upcoming activities, events and reminders, including referral and appointment requests. Providers are able to send e-mail notices, inviting patients to log into the portal and access reminders of appointments, immunizations, and prevention tips, as well as posted and approved summaries of test results, encounters and discharge instructions.

Although providers may still review and finalize patient appointment requests, patients have the power to initiate appointment requests, manage existing appointments and send appointments to a personal calendar. They can also request medication refills or ask for a specialist referral based on time, location and provider preference.

“The ability of patients—especially chronic care patients—to collaborate with care providers is essential to the effectiveness of patient-centered medical homes and ACOs,” says Leader. “The patient portal provides a platform for ongoing coordination and collaboration and encourages patients and families to more fully participate in care decisions.”

The ideal patient portal should include - or have plans to develop - these provider-patient collaboration features:

- Patient calendar
- Calendar notifications and reminders
- Appointment scheduling
- Export to patient calendar
- Test results review
- Secure messaging
- Referral and medication refill requests
- Patient clinical encounter summaries
- Discharge instructions
- PHR export

Five: Increase revenues through enhanced patient account management

Key issue: Does the portal allow patients or designated family members or caregivers to enter and maintain non-clinical information related to demographics, insurance and preferred providers, pharmacies and medical facilities?

The most effective patient portals make it easy for patients to register as new users using a self-generated username and password, receive hospital staff verification and assignment to a medical record, and then complete the full registration needed to collaborate with providers and view clinical results. Like providers, patients can enter the portal through a single log-in screen, avoiding the need for repeated log-ins.

If patients intend to share basic information with providers, they can enter demographic data, including language preferences, along with scans and uploads of insurance cards and forms that would allow them to view eligibility and coverage information for specific procedures.

If collaboration is the goal, patients can grant certain providers access to their health record, while also identifying preferred pharmacies for prescription routing, preferred family members, guardians or caregivers for providing health information updates and preferred medical facilities such as labs or imaging centers.

The ideal patient portal should include—or have plans to develop—these patient account management features:

- Self-registration
- Single sign-on
- Demographic information entry
- Insurance information entry
- Preferred providers, pharmacies and facilities
- Family member involvement through proxy assignment
- Billing summaries
- Management of payment plans

Example #3 Patients Receive Notifications and Confirmations through Patient Portal

A husband and father of three, 50-year-old Bob is a diabetic with a family history of heart disease. He needs an easy, convenient way to find out about test results, reports and confirmed appointments. A patient portal overcomes Bob's problem of knowing his health results are available but unable to reach him because of inadequate delivery options. Now, Bob reads a notice in his public domain email about a secure message on the patient portal. He securely logs in and views a summary of test results already reviewed and approved by his physician, along with confirmations and announcements.

The result: Bob acquires advanced knowledge of his condition, including strategies for improved management. His physician streamlines communication and saves time by sending Bob his results over a secure portal rather than scheduling a face-to-face appointment.

Six: Use the portal to facilitate care management and administer the system

Key issue: Does the patient portal offer access to tools that enable providers to better manage patient care?

The most effective patient portals aren't just for patients. They're also for providers who work hard to enhance care management through access to provider-only pages. Using role-based queue management, providers are able to review, prioritize and route clinical questions or patient requests for appointments. They can search and view patient-entered information, validate and match patient registration information to a local medical number, scan patient messages by time and date, and review portal usage and access through timely operational/auditing reports.

The ideal patient portal should include—or have plans to develop—these care management features:

- Role-based queue management
- Patient search and view
- Patient registration and validation
- Inbox review of patient messages
- Reports on access and usage

Seven: Promote and educate patients and providers on patient portal features and benefits

Key issues: How can patients and providers be motivated to adopt and use the patient portal?

To convince clinicians, patients and family members of the value and benefit of the patient portal, providers can present scenarios to document improvements, identifying how patients, providers and family members typically interacted in the past compared with the features, functions and benefits available through the patient portal.

mySharp's success is the result of a savvy marketing and communications campaign. Trained in portal features and functions, staff members were at varied Sharp Rees-Stealy facilities to help patients register for the portal. Patients also learned about the portal from flyers, e-mail communications, radio ads and a Web site that offers a video, frequently asked questions and explanations of features.

Following are just some of the commentary HCOs can use in communicating with providers and patients:

Improve patient registration and information updating: "Right now, office staff struggle to take down patient information at the start of every office visit. With the patient portal, patients can go online to self-register for procedures and office visits, entering demographics, health history, and information on insurance and eligibility."

Give patients the appointments they want—quickly and efficiently: "Your practice has probably grown accustomed to patients who call in and schedule appointments blindly. With the patient portal, patients can quickly and easily request an appointment time slot with a chosen provider."

Help patients refill prescriptions: "Patients often call your practice to secure approvals on prescription refill requests. Your practice must approve the request, arrange a prescription refill with the pharmacy and alert patients when the refill is ready. With the patient portal, patients make refill requests online, while providers send approvals to pharmacies and patients and notify patients when refills are available."

Allow patients to view their test results: "Patients typically used to wait by the phone or travel to a physician practice to view test results and reports. With the patient portal, patients need only wait for a provider to approve and post reports and results, complete with physician notes, before viewing them."

Help patients manage chronic disease: "Patients with diseases like diabetes, congestive heart failure and asthma typically go over a care plan during a physician appointment. With the patient portal, patients can easily review disease-specific content, announcements, disease assessments and management and decision support alerts."

Provide a platform for patient-provider secure messaging: "For years, practices have interacted with patients via public domain e-mails, in-person appointments and phone calls. With the patient portal, patients can join in routine healthcare decision making by exchanging secure messages with their providers."

Example #4 Patients Send Secure Messages over Patient Portal

Celeste, a 35-year-old mother of two, needs a secure way to communicate with her pediatrician and primary care physician about discharge instructions, test results and lab and radiology reports.

Meanwhile, Celeste's physicians want to send test results, lab and radiology reports securely over the Web, allowing Celeste to quickly view the results and make healthcare decisions for herself and her family. Through a patient portal, Celeste and her physicians can exchange secure e-mails, including clinical questions and results posting.

Eight: Ensure security and system administration

Key issue: Does the portal offer patients and providers secure access and convenient system administration?

The optimum patient portal offers providers the opportunity to conduct systems administration through a single systems administration page. This page allows administrators to manage message recipients, contacts for defined system roles and providers taking charge of patient-centric activities.

The best patient portals deliver security via automatic page time-outs based on site- specified parameters, interfaces to enterprise lightweight directory access protocol and one-time authentication through which users sign in just once to access authorized pages.

Effective patient portals also address multiple security roles, groups and functions, including systems, patient, queue, financial and content administration, clinical reference maintenance, registered and non-registered patients, physician and non-physician clinicians, and management review, reports and audits.

The ideal patient portal should include—or have plans to develop—these systems administration and security features:

- Message center configuration
- Contact administration
- One-time authentication
- Automatic page time-outs
- Multiple security roles, groups and functions

Lessons Learned

Sharp HealthCare's Michael Sanchez offers these recommendations for the design and implementation of a patient portal:

- Involve professionals from every affected department in the design, implementation and education and promotion of the patient portal
- Think big. "Start with your dreams for an optimum patient portal solution," says Sanchez. "The worst thing you can do at the outset is to limit your thinking."
- Set limits. "Figure out what you can and want to do, and what you're not willing to do at this particular moment in time," advises Sanchez.
- Focus on helping patients better manage their health online
- Survey potential users on preferred portal features and functions with the question: "What would you most like to be able to do online?"
- Solicit ongoing input from both healthcare professionals and patients on how they use and benefit from the patient portal
- Think ahead. Sharp Rees-Stealy has plans to make mySharp available through other hospitals in the Sharp system and have radiology results available online
- Evaluate the impact of portal features and functions on clinical, financial and operational performance and the workflows of healthcare professionals

Conclusion

The patient portal can be indispensable in helping hospitals, health systems, IDNs, and HIEs fulfill the requirements of meaningful use, offer patients access to personal health information, and deliver enhanced communication and collaboration between patients and multiple providers along the continuum of care.

But not all patient portals are alike. Some focus on business functions while ignoring or downplaying the clinical elements of care. Others offer a variety of features and functions, but lack the agility to adapt to changes generated by PCHM, value-based purchasing, bundled payment and high-performance, accountable care.

HCOs would do well to take a disciplined, phased in approach to patient portals. Consider portals that streamline clinical and business workflows while offering providers a fresh opportunity to engage, communicate and collaborate with patients and other providers. At the same time, look for portals with the potential to address patients' changing health management needs and bring them into a partnership with multiple care professionals and organizations.

Resources

Transforming Patient Engagement: Health IT in the Patient-Centered Medical Home

<http://www.pcpcc.net/files/pep-report.pdf>

Supporting Patient Engagement in the Patient-Centered Medical Home

http://www.pcpcc.net/files/Supporting_Engagement_PCMH.pdf

Meaningful Connections: A Resource Guide for Using Health IT to Support the Patient-Centered Medical Home

http://www.pcpcc.net/files/cehia_mc.pdf

Making Healthcare Better with Patient Engagement

<http://www.healthleadersmedia.com/content/MAR-243638/Making-Healthcare-Better-with-Patient-Engagement##>

The Five of Patient Engagement with HIT

<http://www.dcpatient.us/2011/04/the-5-myths-of-patient-engagement-with-hit/>

Making Patient Engagement Useful

<http://geekdoctor.blogspot.com/2011/06/making-patient-engagement-useful.html>

InformationStat

<http://www.informationstat.com/main.html>

The Missing Ingredient in Accountable Care

http://www.nytimes.com/2011/01/27/health/views/27chen.html?_r=1

Ten Ways to Improve Patient Engagement through Technology

<http://cal-med.com/Company/Blog/tabid/108/EntryId/9/10-Ways-to-Improve-Patient-Engagement-With-Technology.aspx>

Patient Portals: A Look Forward

<http://www.healthleadersmedia.com/page-1/MAG-263727/Patient-Portals-A-Look-Forward##>

Measuring the Impact of Patient Portals: What the Literature Tells Us

<http://www.chcf.org/publications/2011/05/measuring-impact-patient-portals>

Patient Portals: A Jumpstart on Meeting Meaningful Use Requirements

<http://www.himss.org/ASP/ContentRedirector.asp?ContentId=74627&type=HIMSSNewsItem>

Patient Portals: Beyond Meaningful Use

<http://www.physicianspractice.com/technology/content/article/1462168/1890621>

Patient Portal Use Becoming an Inevitability

<http://www.fiercehealthit.com/story/patient-portal-use-becoming-inevitability/2011-04-23>

Will Patient Portals Open the Door to Better Care?

http://www.healthdatamanagement.com/issues/18_3/will-patient-portals-open-the-door-to-better-care-39853-1.html

Patient Portal and PHR Info

<http://www.patientportalguru.com/>

Much Ado about Patient Portals

<http://chilmarkresearch.com/2011/03/18/much-ado-about-patient-portals/>

Appendix

Meaningful use

Patient portals should provide direct and indirect support of meaningful use requirements. For example, in the category of direct support, a strong patient portal will help providers meet these meaningful use requirements:

Build in access controls-170.302(o): A portal should provide access control to patients and providers, while offering emergency access through match or waive measures.

Report laboratory test results-170.302(h): A portal should present patients with secure summaries of clinical encounters, including views of specific test results.

Provide patient-specific education-170.302(m): A portal should provide patients with access to patient education and resources, allowing providers to direct patients to disease or condition-specific resources.

Create an automatic log-off-170.302(q): A portal should issue a time-out after a predefined period of inactivity, require authentication before subsequent log-ins and support privacy for access from public workstations.

Track users-170.302(r): A portal should use an audit log to track each user who accesses the portal, including patients, providers, system administrators and executives.

Ensure data integrity-170.302(s): A portal should use database encryption to secure data stored within a repository.

Offer registration plus authentication-170.302(t): A portal should provide access by requiring registration followed by authentication.

Encrypt information-170.302(u)(v): A portal should secure data within a repository by providing general database encryption, as well as encryption during electronic health information exchange.

Send patient reminders-170.304(d): A portal should allow providers to not only send patients secure e-mail reminders of health screenings, immunizations and events, but also invite patients to log in and review secure reminder messages.

Present patients with discharge summaries and copies of health information-170.304 (f) (h): A portal should provide patients with clinical summaries generated through physician office or hospital visits, provider-submitted information such as lab results and cardiology reports, medications, discharge summaries and other information. The portal should also allow patients to print out and export information.

Commit to timely patient access-170.304(g): A portal should offer patients timely access to clinical summaries and other critical health information.

Not every patient portal will provide direct support of meaningful use requirements, but they can provide invaluable indirect support. Evaluate how well a patient portal solution indirectly supports these meaningful use requirements:

Perform drug-drug and drug allergy interaction checks-170.302(a): A portal should provide access to patients' medication and allergy entries, opening the door for providers to update information within the EHR.

Maintain up-to-date problem lists-170.302(c): A portal should deliver problem list functionality, allowing for patient information entry and patient and provider information viewing. Providers should be able to generate and offer patients access to increasingly complete problem lists.

Develop an active medication list-170.302(d): A portal should offer providers access to patient-entered medication lists.

Create an active medication allergy list-170.302(e): A portal should invite patients to enter their medications so providers can better understand patients' health status and update medication and allergy lists.

Report on vital signs-170.302(f1): A portal should encourage patients to enter health status indicators, offer designated providers access to information and ultimately upload and import findings from medical monitoring devices.

Support calculation of body mass index-170.302(f2): As part of a patient-generated health status indicator, a portal should be able to calculate body mass index and make the result available to patient-designated providers.

Plot and display growth charts-170.302(f4): A portal should invite patients or parents of patients, to enter the height and weight information needed in growth charts and then make the charts available to patient-authorized providers.

Monitor smoking status -170.302(g): A portal should offer providers access to patient-entered information on smoking status, goals and progress on smoking cessation.

Share lab test results-170.302 (h): A portal should allow patients to view lab test results online, add results obtained through other settings such as health fairs and share results with authorized providers.

Reconcile medications-170.302(j): A portal should invite patients to enter all current medications, allow providers to update the portal with information on prescribed medications and refills and make patient-entered information available to all authorized caregivers.

Calculate measures automatically-170.302(n): A portal should deliver data for meaningful use compliance reports, including the number of summary documents supplied to a patient in a certain time frame with specific dates for encounters, report requests and report creation.

Facilitate electronic prescribing-170.304(b): A portal should support real-time prescription renewal requests via secure messaging, which accelerates the renewal process and delivers more timely feedback to patients on renewal outcomes.

Record demographics-170.304(b): A portal should invite patients to enter demographics information and make the information available to authorized providers who can update EHRs.

Provide patients with e-copies of discharge instructions-170.306(e): A portal should offer hospitals and health systems the opportunity to store discharge instructions for patient access.

Offer advance directives-170-306 (h): A portal should query patients on whether they have an advance directive, invite them to upload the document, and make the information available to all authorized providers.



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