Patient Portals, Part 2: What Features Do You Need?

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As the federal meaningful use (MU) criteria for electronic health records (EHRs) evolve through each of the stages of implementation, the ability to exchange information electronically is quickly moving to the forefront of the requirements. Under the Stage 2 MU objectives, for example, your patients will need to be able to access their health information online, and you'll need to be able to exchange electronic messages with patients securely—and you should expect a patient portal to meet these requirements.

Beyond the MU requirements. Most vendors also offer a number of additional useful modules with their patient portal. When implemented, these features give practices the opportunity to move beyond the MU requirements. "Our patients like being able to book an appointment without going through our [telephone system's] auto attendant, to pay their bills at their convenience, and to send an e-mail to their doctor when they have a query," said Janna Mullaney, COE, COT, OCS, chief operations officer at Katzen Eye Group & Aesthetics by Katzen. "These features are accessible day and night and can be used whenever our patients want, which is a tremendous advantage for both our practice and our patients."

Know Your Options

Evaluate your options and create a long-term strategy. By assessing the full range of portal components, you can then determine which capabilities will best suit your practice. After considering which options your staff and patients will find useful, you'll need to decide whether to roll them out all at once or introduce one or two elements at a time (see last month's *EyeNet*).

Which features will prompt patients to use your portal? "Some features tend to draw patients to a portal more than others," said Joy Woodke, COE, OCS, practice administrator at Oregon Eye Consultants. "For example, the ability to pay their bill online might be more appealing or helpful to some patients than the features that we are trying to get them to use in order to meet the MU requirements." And once patients become comfortable with one feature, they'll be more likely to start using others.

Registering

Save the patient time in the office. When registration is completed prior to an appointment, patients spend less time in the waiting room and more time engaged in their care.

Give patients a heads-up on how long it takes to register. "Whether it is done online or while a patient is in our office, it usually takes 10 to 15 minutes to complete all of our registration forms. For patients who complete the information online, we inserted a notice at the beginning of the program that lets them know how long it will take if they are filling everything out for the first time," said Asheville Eye Associates chief performance officer, Denise Fridl, COT, COE.

12 Features to Consider

A robust patient portal should include the following features:

- Clinical summaries
- Secure (HIPAA-compliant) messaging
- Online bill pay
- New patient registration
- Ability to update demographic information
- Prescription renewals and contact lens ordering
- Appointment requests
- Appointment reminders
- Medication lists
- Lab and test results
- Medical history
- Patient educational materials

Screen registration information for bad data. "Our patients can complete their registration and update their information online, but we review it before it is accepted into our EHR—it is not a live interaction where patients can update the system," said Ms. Woodke. "We want to make sure that the data is valid before accepting it. If something is not entered or updated correctly in registration, it could hold up our claims or cause other problems that can affect the patient and the practice."

Secure Messaging

When your patient portal is integrated with your EHR system, secure messaging provides an efficient way to exchange information with both patients and other providers.

Communicate with patients more efficiently. Answering, triaging, and returning patient phone calls can take a tremendous amount of your staff's time. "One available component of the portal that practices might not always appreciate is the secure messaging feature, which enables a practice to communicate with patients in a HIPAA-compliant manner," said Ms. Woodke. "Activating this module of your patient portal can reduce the time that your patients are placed on hold and helps your practice to overcome the frequent challenges of reaching a patient. It is often much easier or convenient for a patient to send us a message that says: 'I have new insurance—please call me at a certain time.'"

Exchange data with other providers. "Patient portals allow us to communicate effectively and promptly with our referring physicians by exchanging information and test results. These tests or chart notes can then be imported into a patient's electronic record, where they will be permanently stored. Implementing this process may be helpful in meeting other MU2 core objectives," said Ms. Woodke.

Requesting Appointments

"When we first made appointment requests available online, our patients were able to send us a request for an appointment, and we could either book the desired appointment time or respond to the request with an alternate option if the requested appointment time was not available. This helped us with appointment scheduling right away," said Ms. Mullaney. "We later upgraded the feature, making it more sophisticated. In order for the feature to work properly for us, the setup had to be very specific. We had to enter the hours for each location, every doctor who works in each of those locations, the hours that they work, and the exam types that they accept so that when a patient requests an appointment, they are actually requesting a viable appointment."

Providing Educational Materials

Diagnoses and treatment plans can be difficult for patients to understand and remember. In order to reinforce this information, practices have been giving patients supplemental printed materials for years. And now, with a portal, patients can access these materials online.

Are patient education materials available through your EHR system? "One advantage of our EHR system is the ability to right click and send anything we have in writing through the portal to our patients. Every relevant education piece is not only saved to a patient's chart but is also sent to the portal. Before our patients leave the office after an appointment, we tell them that we will be sending this information to their portal account. When they get home, they can read it at their leisure and share it with their family or friends. And included on every brochure at our office is a notice that says that the brochure is also available through the patient portal," said Ms. Mullaney.

Is your EHR vendor using Academy materials? Several EHR companies have signed licensing agreements with the Academy, allowing them to incorporate Academy patient education materials into their EHRs. These materials include more than 90 downloadable handouts about common eye-related issues, 3-D animations that illustrate standard procedures and treatment options, and educational videos that detail common ophthalmic conditions. "We integrated this content with our EHR system so when a patient receives their clinical summary, they also receive educational information based on their diagnosis. We can also add information such as supplemental brochures, customize information, or include links that redirect patients to the AAO website or our contact lens distributor for more information," said Ms. Mullaney. For more information, including a list of participating EHR vendors, go to: http://store.aao.org/ehr-integration-information.html.

Ask for Patient Feedback

It is important to communicate with your patients and ask for feedback about your practice's performance and services—including your patient portal. In order to get tips from them for making the portal more useful, Ms. Woodke suggested asking: "'What would make your interaction with our portal better? Is there something else that we could offer that would make this experience better for you?' The answers you receive should guide you in improving your features so that more patients are willing to access your portal."

Asheville Eye Associates has a patient satisfaction survey built into their portal. "Satisfaction surveys are included with every e-mail that we send to our patients, including questions about our portal. We have had excellent feedback from everyone who has responded about the ease of our portal's use. For the most part, our transition into portal use has been very smooth," said Ms. Fridl. ■

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