Four Strategies for Effectively Using Your Patient Portal

Communicating with your patients about their care is a fundamental part of your practice. In today's electronic world, online interaction should be an integral part of your overall communication strategy.

Patient portals are the *only* way to make such interaction possible in a secure and documentable manner that adheres to federal requirements. And they confer benefits on your practice, including increasing efficiency, boosting revenue, improving documentation, and facilitating your participation in the Merit-Based Incentive Payment System (MIPS). Beyond that, your patients will appreciate the additional services and convenience that portals provide them.

Here are 4 straightforward strategies for communicating effectively and efficiently with your patients.

Strategy 1: Use a Portal

"Never use personal email or texting for anything related to your practice," warned Joy Woodke, COE, OCS, OCSR. "Patient portals were created so communications from and to the practice would be secure, trackable, and HIPAA compliant when the software is certified." Ms. Woodke is chair of the AAOE Electronic Health Record (EHR) Committee and administrator at Oregon Eye Consultants in Eugene.

Understand the basics. Patient portals are typically an add-on software component that integrates with your practice management and EHR systems so that personal health information (PHI) is externally accessible to patients in a secure format while remaining protected by internal checks and balances. PHI is not transmitted directly to your patients; rather, they are invited by your practice to join your portal. Here they can, at a minimum, log in securely to access information regarding their medical status and history, diagnoses, and medication lists.

The portal enables them to view, download, and print their medical record, as well as to transmit copies of it to other physicians. The latter capability was formerly a federal requirement for participation in the EHR meaningful use program and is now part of MIPS.

Explore the options. Portals offer a variety of additional communication features that can be customized and implemented based on your practice's preferences. Sending out appointment reminders, accepting prescription refill requests, allowing patients to pay bills, and facilitating patient inquiries are just a few of the features you can include.

MIPS and Patient Portals

Use your portal to help achieve some of the MIPS advancing care information (ACI) measures and improvement activities.

ACI. If you are reporting the 2018 ACI transition measure set, for example, a patient portal can help you with the following measures:

- Provide Patient Access
- View, Download, or Transmit (VDT)
- Patient-Specific Education
- Secure Messaging

Improvement activities. Of the 24 improvement activities that you can report via the IRIS Registry, a patient portal is critical for one of them—IA_BE_4: Engagement of patients through implementation of improvements in patient portal—and could play a role in several others.

To learn more about MIPS, visit aao.org/medicare and also see June's *EyeNet* supplement, *MIPS 2018: A Primer and Reference.*

Before enabling these functionalities and rolling them out to patients, practices should first determine the degree of interactivity they want the patient to have with the portal. Each practice can then develop an implementation strategy that gradually incorporates one feature at a time, establishing solid protocols and providing appropriate staff training.

Jeffery Daigrepont, EFMP, CMPE, senior vice president at the Coker Group in Atlanta, outlined 3 broad categories of engagement that progressively build upon each other.

One-way communication. Patients

BY LESLIE BURLING-PHILLIPS, INTERVIEWING **JEFFERY DAIGREPONT, EFMP, CMPE,** AND **JOY WOODKE, COE, OCS, OCSR.**

can log in to the portal and look at, print, and download information and receive notices from the practice via secure email or text. However, reciprocal interaction from patient to practice is not permitted.

Two-way (limited) communication. Additional functionalities enable patients to contact the practice for routine queries such as scheduling an appointment or requesting prescription refills.

Two-way (comprehensive) communication. Patients can initiate, as well as receive, a wide range of communications. For example, they can confirm appointments, update their demographic information, and send and receive secure messages. Mr. Daigrepont said, "My physician allows his patients to contact him directly through his practice's portal, and he personally responds, which is incredibly convenient."

Prioritize patient privacy. Be sure to emphasize your commitment to protecting their privacy when you ask patients to sign up for your portal. "Before you correspond with your patients online, they should first give the consent to receive email or texts from your practice," said Mr. Daigrepont. He added that you can help increase your patients' level of security by providing guidance on protecting personal data and instructions for creating—and safeguarding—strong passwords.

Keep PHI secure. PHI such as a patient's demographics, medical history, laboratory and other test results, and diagnoses should never, under any circumstances, be transmitted in an insecure way. Because most personal email is not HIPAA compliant, all electronic communications related to a patient's PHI should be disseminated solely through a certified patient portal.

Mr. Daigrepont said, "The safest and most proper way to electronically communicate PHI is to invite patients to come in to your environment with their personal log-in credentials to access this information. Although anyone's credentials can be compromised, if the practice is not transmitting this information, it has little liability."

Strategy 2: Monitor Your Portal

Plan ahead. One of the greatest errors a practice can make is setting up a portal without first determining how it will be used to interact with patients and who on your staff should be involved with its day-to-day use, cautioned Mr. Daigrepont. He recommended designating a person or team responsible for responding to incoming communications through your portal, just as you would for triaging phone calls or handling face-to-face encounters.

Ms. Woodke agreed and added, "Our overall goal is to ensure that our patients feel like we are just as efficient electronically as we are when they call on the phone." She said that this goal can be achieved through training staff to follow practice protocols and approved scripts for communicating with patients. For example, if a technician receives a call regarding a patient's condition, the protocol is not to offer medical advice but rather to consult with a physician and then relay any message from the physician to the patient. "These policies apply to all practice communications, and portals should be treated no differently," she noted.

Strategy 3: Market Your Portal

No matter how functional and well honed your portal is, implementation will not be effective without a marketing campaign that involves patient education and portal promotion.

Initially, some ophthalmologists were concerned that their elderly patients would not embrace portals, the assumption being that these patients would be inexperienced or uncomfortable with electronics or not be able to use them because of low vision. These concerns have proved false—many senior ophthalmic patients are adept at using of smartphones, tablets, and other digital devices. "Indeed," said Ms. Woodke, "our first online appointment request was from an 80-year-old patient with macular degeneration." She added that at least half of her practice's patients use the portal.

See the big picture. Practices should think beyond using portals simply as a tool for communicating with patients. They can also be a mechanism for providing a higher level of ongoing support and education that can generate greater patient involvement with their health, possibly leading to better outcomes.

When utilized to its fullest, a patient portal can promote your practice as well, said Mr. Daigrepont. "One of the greatest benefits of collecting patients' email addresses and cell phone numbers is that they rarely change, making this a much more affordable way of reaching out to your patients than through traditional postal mail, which is quickly becoming an obsolete practice."

Build your brand. Design your portal to resemble your website, and incorporate your practice name and logo. And make sure that your website includes an easy-to-find link that launches the portal.

Mr. Daigrepont offered the following suggestions: "Maximize your marketing opportunity and integrate portal promotion with your online presence so your brand is consistent and complements all other forms of communication. Keep information up to date, add new features regularly, and make it easy for your patients to navigate so they will want to return."

Strategy 4: Learn From Your Portal

All correspondence that comes in to or goes out of your practice via the portal is documented within the system, so relevant reports can easily be generated. For example, if an appointment reminder is sent through the portal, the portal tracks the appointment's status, including when the reminder was sent and when the appointment was confirmed by the patient. You can then create a report that indicates how many appointments were confirmed through the portal. Ms. Woodke said, "Based on these reports, you can determine how much your efficiency has improved when compared to confirming patients by phone." She recommended using these data to identify areas needing improvement and to set goals for your staff.

Mr. Daigrepont is senior vice president at the Coker Group, a nationwide consultancy group based in Atlanta. *Financial disclosures: None.*

Ms. Woodke is the administrator of Oregon Eye Consultants in Eugene, an Academy consultant, and chair of the AAOE EHR Committee. *Financial disclosures: None.*