Patient Portals: How to Train Your Patients to Use Them

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SYNOPSIS

Your EHR's patient portal enables patients to track and follow-up on their health care needs. Patients also must use your EHR's patient portal for your practice to meet Meaningful Use requirements--and taking steps to train patients in its use can increase usage of this resource.

ACTION POINTS

PROVIDE HANDS-ON HELP. Before or after the patient's appointment, have staff work with patients to log into the portal and set up a username and password.

ASK PATIENTS TO UPDATE INFO ONLINE. Explain when patients call for appointments that they can fill out forms ahead of time through the portal, updating their information.

ENCOURAGE PATIENTS TO USE PORTAL. At the end of exams, let patients know they can visit the patient portal to review all the prescriptions and product information you discussed during the visit.

Your electronic health record's patient portal is an important new resource. It elevates patient care providing them a secure way to view records, schedule appointments, send messages to staff, and otherwise interact with your office. Ensuring patients understand how to use the patient portal is essential for more than their own good, though. To meet the Centers for Medicaid and Medicare's 2015–17 Meaningful Use (MU) requirements, patients must not only establish a username and password in your portal; they also must use it.

To meet MU requirements in 2015, 2016 and 2017, you must provide more than 50 percent of your patients access to their health information within four business days. In addition, at least one patient must act upon their health information during your reporting period by viewing, downloading or transmitting their health information to another doctor. To meet both of these requirements, you need a patient portal that is not only secure, but easy to use.

In my practice, we take steps to move more patients to use our patient portal, which is part of our Eyefinity EHR.

In 2015, I have used four other physicians' portals as a patient myself, and as the father of a patient. None are as easy as Eyefinity EHR. It is easy to navigate, to get my daughter's information as a representative, update her history, send a message to myself, her doctor, print out reports…everything is easier with Eyefinity EHR's patient portal than with the four other portals I have used over the last year.

The patient portal on Dr. Bass's practice web site. Dr. Bass says it's essential to let patients know while they are in your office that they can use the patient portal to access their records, to make appointments and to send secure messages to the doctor and staff.

Encourage Patients Calling for Appointments to Visit Patient Portal

When patients schedule their appointments on the phone, or when we confirm/remind patients of their appointment by phone, we request they go to our web site, www.cus2c.com, and click on the "Patient Portal," to update their patient history.

We explain to patients that they can use the portal to fill out forms ahead of time, rather than having to spend time at the beginning of their appointment doing it at our office.

Patients are able to fill out their medical history at home online, and it integrates into the patient record. No need to take staff time to enter the information. All our staff need to do is go into the EHR to verify the medical history at the appointment.

The information patients see on the portal is similar to what the staff and doctor sees. It is not an "intake form" as much as it is a complete medical and ocular history. Patients cannot adjust their name, address or phone numbers. This information must be exactly as their insurance card/company has it; even if incorrect. In order to file claims, the patient information must match what the insurance company or employer has on file.

Use In-Office Signage

We have a sign mounted prominently in our reception area, about all that's available on our practice web site, including on the patient portal:

Ask US About Our WebSite
www.cus2c.com
About Us
Patients
On-Line Store
Patient Portal
Location

Provide Instructions for Using Patient Portal

We print the patient portal instructions on our practice business cards: Go to our web site, click on "Patient Portal," put in the log-in name and password we gave you, then, when logging in, you must change the password to one you will remember, and then explore the portal.

Provide Hands-On Portal Training In Office

The most effective thing we've done to encourage more patients to use the patient portal is having my staff take the time to work with patients to log in and change their password before they leave the office. Once patients use the portal and see how easy it is, the more likely they will use it again. It's good for the patient and good for
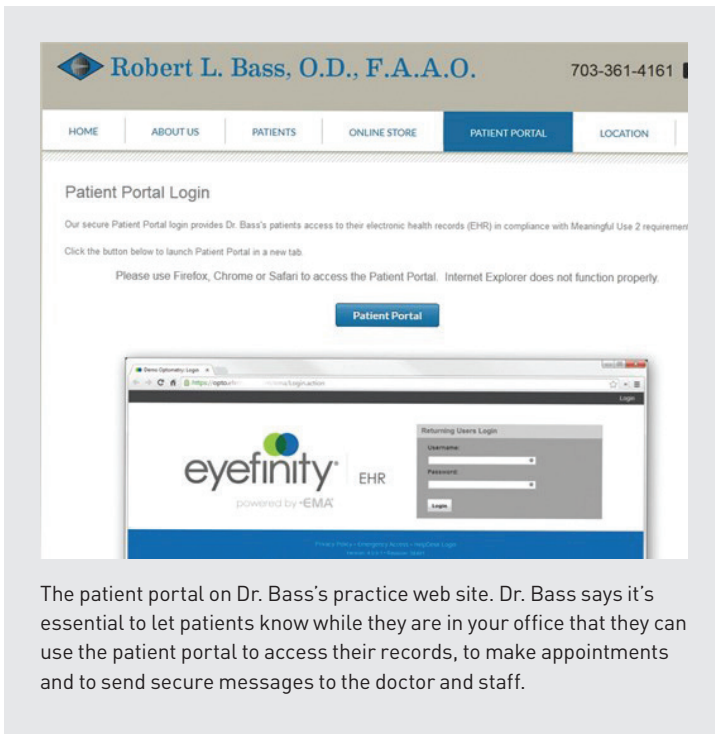
helping my practice meet the MU requirements.

Provide Patient Portal Button on Web Site
Eyefinity helped us by putting a Patient Portal button on my web site. Other than that, no help was needed from Eyefinity because Eyefinity EHR's patient portal, like the rest of its system, is so user-friendly. Eyefinity has made updates since the system's inception to make the language on the portal more patient-friendly and easier to understand. Eyefinity also lets doctors share in an online user network tricks of the trade for getting patients to use the patient portal. You need to figure out what works for your office. For example, I just changed the way I talk about the portal with patients based on a staff suggestion last month. Every patient has a unique log-in and password of our choice, but on log-in, the patient is forced to change the password with certain criteria to something easier for them to remember.

Assure Patients Their Information & Communications are Secure
Eyefinity EHR maintains confidentiality by encrypting all communication to and from our servers to a doctor's desktop computer or an iPad during transmission. Encryption is achieved using (AES-256 256-bit) SSL encryption. This is the same high-level encryption banks use for online transactions. The encryption is always automatic and needs no set up by the users. This method of encryption allows exchange of information even on public networks, such as a coffee house or airport, as all the data to and from Eyefinity EHR will be encrypted and secure. Eyefinity EHR does not support unencrypted methods of communication; all communications are always encrypted.

Explain Patients Can Send Records to Another Doctor
In the portal, patients can communicate securely with me or my staff only. If they want to send a report to another doctor, they may. There are three ways they can do this: they can print their visit note (exam report) to a PDF file and print it out and mail. Or they can copy their records to a PDF file and send electronically to their "other" doctor's portal. Last, they can assign their other doctor as what the portal calls a "Representative," and allow them to have a log-in and password to our portal. A Representative may be a doctor, caregiver, guardian, or anyone else whom a patient would like to have access to their file.

At End of Visit, Direct Patients to Portal to Review Information
Provide your patients a reason to go to the portal after their visit. Let them know that they can review and print a summary of their visit, including their Encounter Form, Education Report, and a CCDA for their visit. Your patients will be able to view the same "Visit Note" as it appears in their chart after it's finalized. Imported documentation from peripheral testing equipment is not brought to the portal, but a summary of their results is included. The Visit Note also includes eyewear and contact lens prescriptions, as well as any refractions done during the visit. There is no way to isolate the Rx information, but a signed prescription may be requested via the portal.

The patient portal is a great tool to keep your patients informed and engaged in their health, as well as it being required for MU requirements. Many patients are becoming more comfortable with online communication with their doctors, so adoption may become easier in the future. But for now, remember to show your patients how easy it is to log in and the valuable information available. Hands-on experience in your office will lead to higher patient adoption.

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