NYS- HCCN
Patient Portal and Engagement

June 7, 2017

Agenda

- Patient Portal Measure

- Patient Engagement

- Marketing Tips

- Portal Workflows

- Staff Engagement

- Next Steps and Takeaways

Patient Electronic Access Measure

	Measure	2015 -2016 Threshold	2017 Threshold
1	>50% of unique patients seen by the EP are provided online access to view, download, transmit (VDT) to a third party their health information within 4 business days	50%	50%
2	Patient needs to view, download, or transmit his/her health information to a third party their health information	1 patient VDT	5% VDT

Alternate Exclusion: Providers may claim an exclusion for the second measure if for 2015 they were scheduled to demonstrate Stage 1, which does not have an equivalent measure.

Patient Secure Messaging

Measure	2015 -2016 Threshold	2017 Threshold
Use secure electronic messaging to communicate with patients on relevant health information	At least 1 secure message from provider → patient	>5% of unique patients sent secure message from provider → patient

Alternate Exclusion: Providers may claim an exclusion if for 2015 they were scheduled to demonstrate Stage 1, which does not have an equivalent measure.

Portal Features and Content

What features do I want to enable?

- Test results
- Secure messaging
- Prescription refills
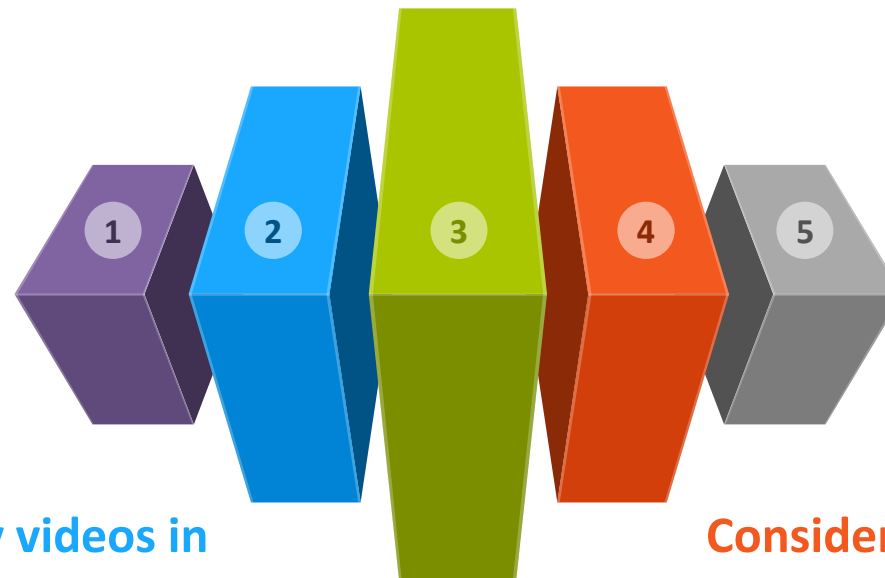- Clinical Visit Summary

Administrative Features

- Requesting an appointment
- Billing payments and pre-registration
- Patient reminders

Marketing Tips

Display signs advertising the portal

1

Play videos in The waiting room

2

Incorporate into Office hold music

3

Consider kiosks in the waiting room

4

Handout Informative Brochures

5

Getting Your Patients Engaged!

- **Make lab results available**
- **Education materials are available**
- **Make appointments quicker and easier**
- **Direct way to ask questions to your doctor**
- **Ability to refill prescriptions**
- **Use weight management & activity tracker**

Engaging Special Populations

Non English Speakers	• Utilize Spanish portal feature
No Internet Access	• Encourage patients to go to the library or kiosks in the waiting room
Elderly/No email	• Have staff create email addresses

Patient Portal Workflows

Who is opening the portal account

- Front desk staff
- Mid level staff
- Interns, medical assistants, volunteers

Helping patients login to the portal

- MA can enroll patients in the exam room
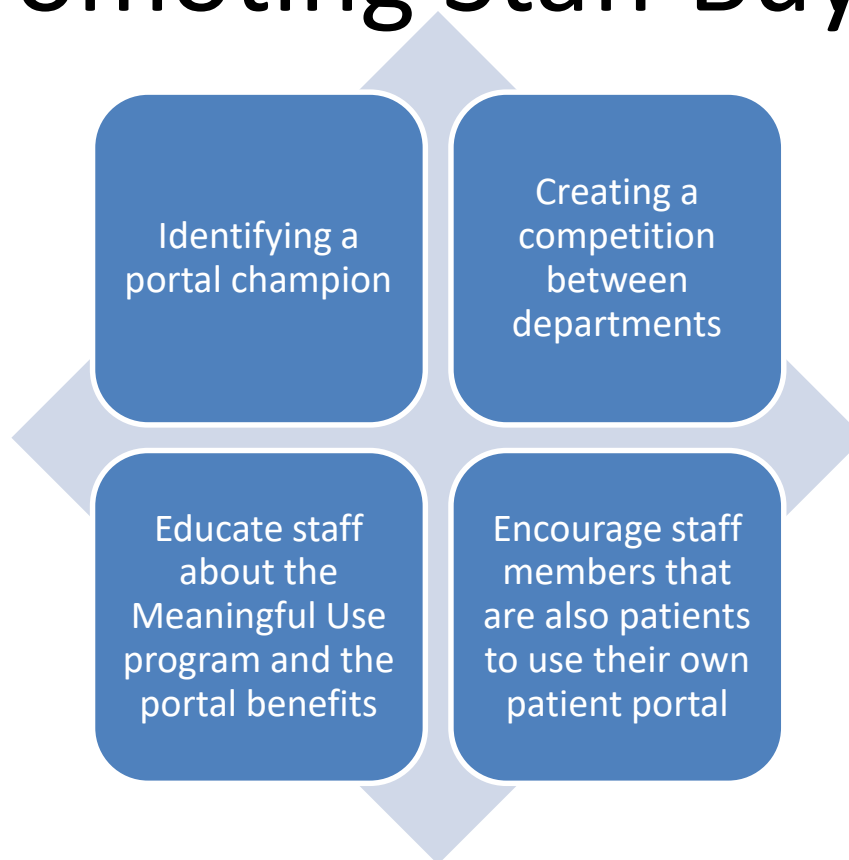- Kiosks/tablets in the waiting room

Patient Consents

Consents for:
- **Parents of Children**
- **Adult care givers**

Informational sheet for all patients regardless of needing consent

Promoting Staff Buy-In

Identifying a portal champion

Creating a competition between departments

Educate staff about the Meaningful Use program and the portal benefits

Encourage staff members that are also patients to use their own patient portal
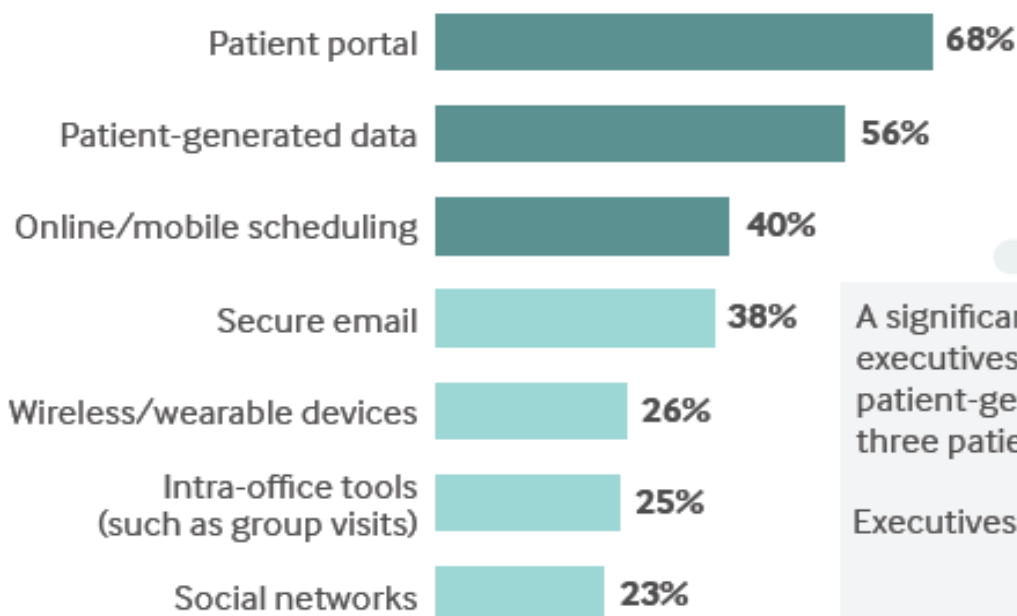
Next Steps and Takeaways

- Decide which features you want to enable in the patient portal
- Develop a portal marketing strategy for your patients including special populations
- Involve all staff members in the portal enrollment process
- Monitor your patients enrollment!

Appendix
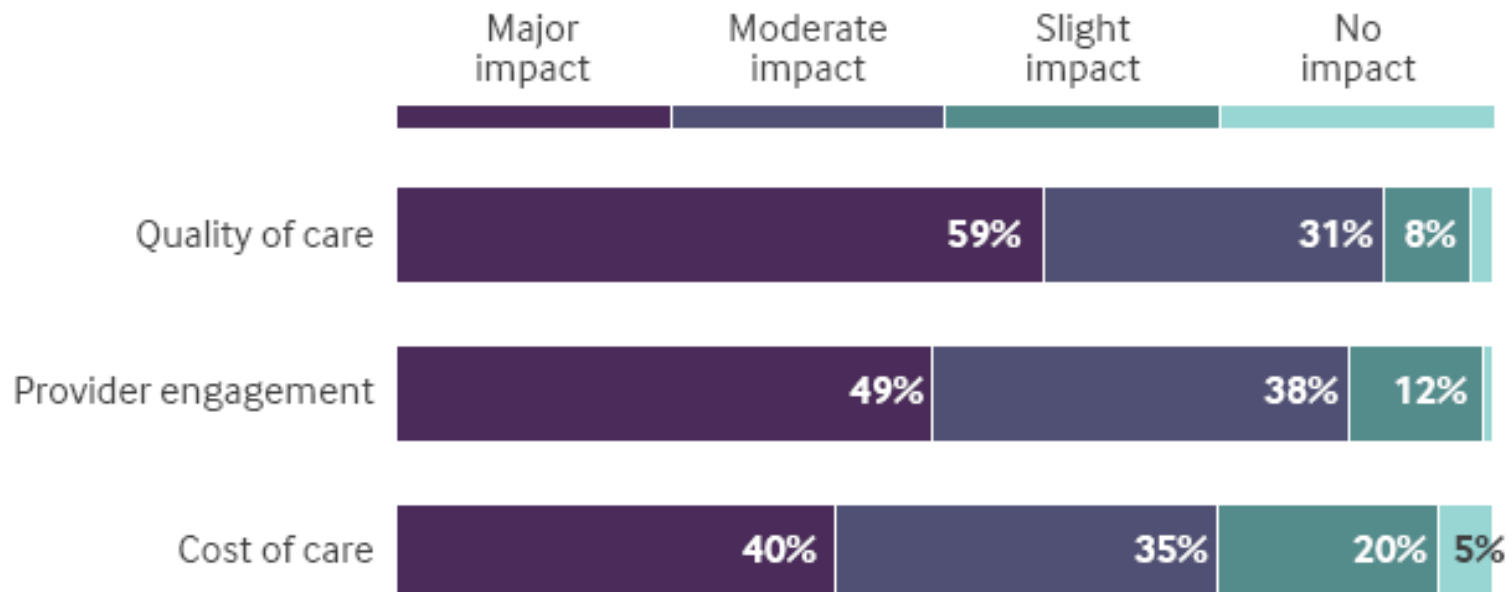
Stage 3 Patient Engagement Measures

Objective	Measure	Threshold	Exclusion?
Patient Electronic Access to Health Information (Must meet all measures in objective)	Patients seen by the EP are provided access to view online, download, and transmit their health information using any application of their choice (that is configured to meet the technical specifications of the API in the EP's CEHRT) within 24 hours of its availability to the provider	>80%	Any EP who has **no** office visits during the reporting period
	The EP must use clinically relevant information from CEHRT to identify patient-specific educational resources and provide electronic access to those materials	>35%	

Stage 3 Patient Engagement Measures (cont'd)

Objective	Measure	Threshold	Exclusion?
Coordination of Care through Patient Engagement (Must attest numerator and denominator for all three measures- however only two out of the three thresholds need to be met)	Patients actively engage with the electronic health record made accessible by the provider	2017: >5% 2018: >10%	Any EP who has no office visits during the reporting period
	A secure message was sent using the electronic messaging function of CEHRT to the patient, or in response to a secure message sent by the patient.	2017: >5% 2018: >25%	
	Patient-generated health data or data from a non-clinical setting is incorporated into the certified EHR technology for more than 15% of all unique patients seen by the EP.	>5%	

> *More than half of respondents (59%) believe that effective patient engagement has a major impact on quality of care, and 40% believe it has a major impact on cost of care.*