Patient Portal Optimization

Empower Patients as Partners in Health Care

Introduction

Contemporary patient portals allow patients and the health care team to have a truly modern-day relationship. At a time when patients expect communication to be effortless and information to be accessible and up to date, patient portals provide a central location on which to build this relationship. Patient portals provide a variety of self-service tools which, if used optimally, can empower patients and transform their role from recipient of health care to partner in health care. Patients who use patient portals report improved communication with their care team, greater participation in their health care, and increased satisfaction. Patients are not the only beneficiaries of patient portals. When used effectively, patient portals can also reduce workload and increase efficiency for physicians and the care team by transferring routine administrative tasks from the care team to the patient. Patient portals can reduce unnecessary office visits and provide a means to more coordinated and less expensive care. This will become increasingly more valuable to health care systems in the current era of transition from fee-for-service to value-based care and risk-based payment models.
Five STEPS to Optimizing Your Patient Portal

1. Understand How the Patient Portal Can Help You and Your Patients

A patient portal can serve as a valuable tool in enhancing the relationship between patient and physician. By communicating electronically, both patients and physicians gain real-time access to health information, clinical guidance, and billing and scheduling services. The portal benefits not only the patient and physician, but the entire care team, decreasing administrative burden on the physician and sharing the workload with other team members who can answer inquiries, assist with scheduling, and address any other patient needs that do not need to be handled by the physician.

Patient portals can allow patients to:

- Access personal and family health information, such as:
  - Problem lists and medication lists
  - Vaccine records
  - Released test results
  - After-visit summaries
  - Referrals
  - Letters from the care team
- Review and update information such as medication lists and contact details
- Securely message their doctors and care team with:
  - Referral requests
  - Medication refill requests
  - Non-urgent medical questions that can be addressed within 1-3 business days
- Schedule appointments
- Check-in for appointments upon arrival
- Complete televisits (e-visits) for certain non-urgent medical conditions
- Receive reminders for visits, immunizations, and screening tests
- Download or complete enrollment forms and health surveys/questionnaires. Portals can be set to automatically assign questionnaires to patients based on patient demographics, problem list entries, or...
appointment types. Responses from these questionnaires can be used to enhance discussions with patients, and sometimes can be incorporated directly into visit notes.

Patient portals can allow the care team to:

- Communicate on a more flexible schedule
  - Patients do not need to be available to take a physician's call and can read responses in their own time and on their own terms, thereby decreasing frustrating "phone tag" or being caught off guard while at work
- Respond to patient questions more efficiently and effectively
  - Smartphrases and quickactions can allow for efficient responses to common patient questions (see STEP 5), which are often less time-consuming for the care team than a phone call.
  - These encounters completed through the patient portal are documented and available for future reference by both the patient and physician.
- Minimize the risk of miscommunication and reduce the need for follow-up questions by providing centralized, consistent after-visit information to patients
  - Patients may be nervous or distracted amid all of the information provided during a typical visit. After-visit information provided through the patient portal allows patients to review information and process details of the visit at any time. This decreases the chance of miscommunication and the need for follow-up questions.

Q&A

Where can I find out more about my organization's patient portal?

Decisions on what features to enable or make active in the patient portal are often made at the organizational level. If you have specific workflow or EHR-related questions in connection with the patient portal, your organization's information technology (IT) department can help. If there are additional features that you think may be beneficial to your organization if enabled, raise the suggestion to your organizational leadership to ensure the suggestion is run through all the proper channels for consideration before implementing.

What about the concern of physicians “doing extra work for free”?

The goal of patient portals is to save time and increase efficiency. While there is some time investment for physicians upfront in learning to use the system and setting up appropriate shortcuts, patient portals should ultimately allow you as a physician to engage in less busywork—not more—each day.

There is no data available that specifically addresses time spent versus saved by using the patient portal. However, studies suggest patient portals do not decrease the number of billable encounters a physician has, and do not decrease the number of office visits a patient makes.

Encourage Patient Enrollment in the Patient Portal

Before your team can make the most of the patient portal, you need your patients to enroll. To encourage enrollment, it is important to communicate the benefits of the portal to your patients.

Here are some ways to encourage patient enrollment:

- Include information about the patient portal on your organization's website
- Provide patients with an enrollment link before the initial visit to create a new account
- Encourage team members to mention the patient portal when patients call to schedule appointments
• Put up flyers in the waiting room and exam rooms with information about accessing and using the patient portal.
• Provide access to technological devices that allow patients to sign up for the patient portal in the waiting room.
• Include information on how to create and use a patient portal account on printed after-visit summaries and on communications sent to patients with test results.
• Send patients an enrollment invitation to access their lab results after a visit.
• Consider a mass enrollment for patients not yet active on the portal and allow an “opt out” option.
• Provide proxy access for adult children of older patients, with patient permission, and for parents of minor children.
• Do not be affected by elder bias; older patients embrace technology more than we might think.

**Q&A**

**What about confidentiality and privacy concerns?**

Patient portals are password-protected and are therefore a secure means of accessing one’s own patient information. Organizations have safeguards in place to prevent inappropriate disclosures and ensure that proxy access is granted only when appropriate. While notifications of new results or new messages can be set to occur via email and/or text message, no patient information is included in these notifications.

3. **Develop an Office Workflow for Handling Patient Messages**

A variety of daily messages can be generated by and sent through the patient portal. The key to success in managing these messages is using a **team-based care model**. Most of the messages from the portal can be addressed by a nonphysician member of the care team. Tailoring how each type of message or task is received and triaged is key to minimizing physician time spent responding to messages. When optimized, patient portal message routing rules can reduce office phone calls, letters, and administrative work performed by the physician. As recommended in the STEPS Forward **inbox management module**, physicians should not be the first set of eyes on any message that comes in.

The following is an example of how pooling or grouping messages can ensure that tasks are carried out in a prompt and efficient manner. However, there are differences in state laws, organizational policies, and many other workflow factors, so the figure below is purely a suggested starting point and will not fit every clinical scenario.

**Figure 1.**

**Suggested Workflow for Handling Patient Portal Messages**
Physicians should not feel obligated to give medical advice that replaces a visit when they believe a visit is necessary. Practices should employ specific guidelines regarding how to handle questions about medical advice as well as a specific protocol for refill requests.

Rules can be built into the portal to ensure appropriate use by patients, improving the care team’s ability to address portal messages efficiently. These can include:

- Character limits to portal messages (eg, 100 to 500 characters)
- Restrictions on the ability to send messages unless patients have seen the physician within a certain timeframe (eg, past 1 or 2 years) or have an upcoming visit scheduled. If these criteria are not met, an auto-reply with a reminder to set up an appointment can be sent.

These rules can be set by your organization’s leadership team and legal department and are not automatically built into the patient portal. Physicians can also set individual rules with their own patients as needed. This can be done with a printed handout for each new patient, or by discussing their preferences with patients during the initial visit.

4 Increase Care Team Efficiency at Managing Patient Portal Tasks

Many interactions within the patient portal are repetitive actions. Follow an 80/20 rule—if you do something the same way 80% of the time, create a speed button or quick action for that task.

Table 1. Examples of Common Shortcuts to Optimize the Patient Portal
For some physicians, phone apps (eg, PowerChart Touch or Epic Haiku) can be beneficial tools to quickly respond to portal messages in between patient visits.

### Measure Increased Patient Satisfaction and Care Team Efficiency

It will be helpful to internally measure improvements in patient satisfaction and care team efficiency as patient portal uptake increases.

In terms of patient satisfaction, while there are no standard questions on the most common patient satisfaction surveys (eg, Press Ganey) about use of a patient portal per se, there are questions about access. One question asks patients to rate their ability to get an appointment when needed and another asks patients to rate communication with the physician's office via phone or email. When there is a patient portal in place that supports self-scheduling or facilitates scheduling with the office, those access questions on the survey could provide useful metrics. It is also possible to add custom questions to such a survey to provide additional metrics that are important for your organization.
In terms of care team efficiency, the EHR has a variety of tools that run in the background to measure the time spent on particular tasks. These metrics can be used to compare against other users in your health system, or other users on the EHR nationwide. It can track message volume, message types, time required to complete individual messages, and turnaround time for a message type. This data can be used to support a discussion for additional resources or message pooling for care teams and provider groups who have higher volumes of messages.

Conclusion

Patient portals are a fairly novel part of patient care, but are becoming rapidly integrated as a core component of the patient–physician relationship. Though many physicians have been hesitant to embrace the patient portal, with proper training and appropriate use of team-based care models, this technology can increase both patient and physician satisfaction.

AMA Pearls

- Patient portals offer a new, efficient way to communicate with patients in modern medicine
- Patient portals can improve both patient and physician satisfaction
- It is important for care team members to learn how to optimize use of the patient portal to maximize efficiency

Learning Objectives

1. Recognize how the patient portal can benefit both patients and physicians
2. Describe the full breadth of patient portal functionalities at your institution
3. Identify specific ways to effectively use the patient portal in your practice

Activity Information:

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References:


