

Spreading Solutions That Work  
Patient Portal Program

Idea Sharing  
Webinar #3  
Options for Successful  
Training

7/13/17

# Welcome



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Coach

## Housekeeping

- ❖ Webinar is being recorded and will be emailed with slides
- ❖ Line is not muted; please control your own muting to eliminate background noise
- ❖ Use chat box for questions

# Agenda



- Announcements
- Lessons from the Field
- Grantee Idea Sharing
- Discussion

# Idea Sharing Webinar Format



- Just-in-time!
  - You Pick the Topics
  - TA – Solid Examples
  - Learning Community Sharing
- Sharing Common Examples, the Good and the Bad
- Record Webinar for Future Sharing
- Follow-up With Each Other

# Announcements



- Aug 10: Idea Sharing Webinar #4: Dashboards
- Sept 14: Idea Sharing Webinar #5: Overcoming Language Barriers
- Oct 12: Idea Sharing Webinar #6: Vendor Partnerships

# Lessons From The Field

# Common Themes in Training



- Let videos (and their links) help you with simple training
  - Call centers love the videos – they can text the patient a link
  - Volunteers in the waiting room love the videos
- Make portal training part of onboard training
  - Share where “just-in-time” videos are located
- There is no training as good as high volume use
  - Expect to retrain until overall portal use becomes a daily routine
- Survey and train to meet real need
- KEY: If you repeat training, video it

# Resources



- Videos and Guides on How to Make Simple Training Videos
- Patient Portal Training Resources
  - Examples of “how to” videos
  - Portal landing page examples
- Provider/Staff Training Resources
  - Work guides – task sheets for portal volunteers
  - Example portal tip sheets for providers
  - Example training courses and “just-in-time” videos
  - Written portal guides for staff
- Idea Sharing Webinar Recordings on Training Ideas



# Resources Shared Today



- Northeast Valley Health Corporation (Vallarie)
  - Provider “how-to” slides on portal tasks (with screenshots)
  - Provider/Staff “how-to” slides on enrolling patients on the portal (with screenshots)
- Planned Parenthood California Central Coast (Yolanda):
  - An example marketing handout – business card type
  - Example marketing posters
  - Example portal satisfaction survey to patients with results

## Grantee Idea Sharing

**Please keep comments under 5 minutes**



# UMMA Community Clinic

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# Who We Are



- Where We Are Located: South LA
- Number of Clinics in the Organization: 2
- Total Number of FTE Providers: 7
- Date Portal First Went Live: February 2016
- Portal Vendor: eClinical Works (eCW)
- Target Population the First 6 Months:
  - Diabetic Patients requesting medication refills
  - Parents/Guardians requesting copy of Immunization record



# Patient Training: Now and Future



- What Patient Portal Training Do You Do Now for Patients?
  - If the patient needs training right now:
    - Currently, we do not provide any patient training. Please share your ideas.
  - Permanent - long term training plan in place now:
    - Currently, we do not have a plan, we are looking into how other clinics do this and what they have put in place.
- What Patient Portal Training Do You Plan in the Future for Patients?
  - Currently, we do not have a plan, we are looking into how other clinics do this and what they have put in place.



# Provider/Staff Training: Now and Future



- What Patient Portal Training Do You Do Now for Providers and Staff?
  - If the provider or staff member needs training right now:
    - Our providers are not trained as they do not have requests assigned to them directly through patient portal.
    - Some of our support staff such as frontline staff, operators and few back office are the ones mainly utilizing Patient Portal.
  - Permanent - long term training plan in place now:
    - As we look into additional training catered to UMMA's workflow we will gradually train all staff including providers.
- What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  - Currently, we do not have any trainings, we are looking for ideas.



# The Good, The Bad...



- What is working...
  - We have not received too many requests from patients via the Patient Portal that my frontline staff has not been able to address.
- What is not working...
  - UMMA does not have all staff trained across all depts.
  - UMMA does not have a training module.
  - UMMA has not put this in our daily workflow process for back office and providers.
- One question I have for the group...
  - Provider Specific: Do providers have additional admin to f/u on all PP related messages. How much time is allotted? Do these visits/messages count towards the providers productivity numbers (productivity goal) set by the organization?





**Northeast Valley  
Health Corporation**  
a *californiahealth+* center

# Northeast Valley Health Corporation

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# Who We Are



- Where We Are Located: San Fernando, CA
- Number of Clinics in the Organization: 14
- Total Number of FTE Providers: 142
- Date Portal First Went Live: 2014
- Portal Vendor: Nextgen
- Target Population the First 6 Months: All Patients

# Patient Training: Now and Future



- What Patient Portal Training Do You Do Now for Patients?
  - In-person one-on-one via the portal ambassador at time of enrollment
  - Member Services help desk provides additional phone support with general navigation
- What Patient Portal Training Do You Plan in the Future for Patients?
  - Future plan is to create a “how to” video tutorial on our website
  - Create a one page “how to” handout to be given at time of enrollment



# Provider/Staff Training: Now and Future



- What Patient Portal Training Do You Do Now for Providers and Staff?
  - Portal Response Teams at each site
  - Schedule training with Clinician Informaticist as needed
  - Director of Ops & Special Projects Admin goes out to sites and trains select members of the Portal Response Teams
- What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  - Create webinars and self teaching tutorial to be made available via out intranet and can be accessed by all staff

# The Good, The Bad...



- What is working...
  - In-person training individualized and group
  - Developed training materials
- What is not working...
  - Staff manpower
  - Trainer manpower
  - Bandwidth
- One question I have for the group...
  - Has anyone created an internal “how to” video tutorial for staff and patients?





San Mateo Medical Center  
*A County System of Healthcare*

# San Mateo Medical Center

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# Who We Are



- Where We Are Located: San Mateo, California
- Number of Clinics in the Organization: 8 physical locations providing multiple services in each site
- Total Number of FTE Providers: 120+
- Date Portal First Went Live: 2012
- Portal Vendor: eClinicalWorks
- Target Population the First 6 Months: Primary Care, Adults followed by a diabetic educator

# Patient Training: Now and Future



- What Patient Portal Training Do You Do Now for Patients?
  - If the patient needs training right now:
    - If patient is in clinic they are offered a printout for username and password
  - Permanent - long term training plan in place now:
    - Call the number if help is needed and questions will be answered.
- What Patient Portal Training Do You Plan in the Future for Patients?
  - Our desire is to increase enrollment and have a possible volunteer group that can assist patients in the clinic with their portal questions.
  - Interested in learning more about training videos

# Provider/Staff Training: Now and Future



- What Patient Portal Training Do You Do Now for Providers and Staff?
  - If the provider or staff member needs training right now:
    - No current staff training in place
  - Permanent - long term training plan in place now:
    - First roll out: all staff was trained on how portal worked, how enrollment works and how to enroll, and education on active portal features
- What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  - Roll out a training based on the functions that are turned on to the appropriate staff members



# The Good, The Bad...



- What is working...
  - Broad scale questions can be answered by a staff member when patients call the number they are given
- What is not working...
  - Front office staff has less time to fully guide patients through the portal
  - Need staff training on current functions of the portal
- One question I have for the group...
  - How have you allocated time for a staff training? Have you held separate trainings depending on workflows or a single staff training?



# Planned Parenthood California Central Coast

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# Who We Are



- Where We Are Located: California Central Coast covering San Luis Obispo, Santa Barbara and Ventura Counties
- Number of Clinics in the Organization:5
- Total Number of FTE Providers: 14
- Date Portal First Went Live:12/2015
- Portal Vendor: NextGen
- Target Population the First 6 Months: Follow up contact within 30 days to review most common side effects with all patients initiating long acting reversible contraceptives (LARC) and depo as their birth control of choice.

# Patient Training: Now and Future



- What Patient Portal Training Do You Do Now for Patients?
  - All of our health centers do verbal registration or self registration, both are opportunities to inform patients of portal and a token is given to those who want to participate. Patients are given instructions and told to login while waiting in patient lobby.
  - MAs assist target population with login and first secured message.
- What Patient Portal Training Do You Plan in the Future for Patients?
  - All patients will either be coached through first login or given a brochure with instructions to login at their convenience.

# Provider/Staff Training: Now and Future



- What Patient Portal Training Do You Do Now for Providers and Staff?
  - Currently only centralized Case Management staff send or respond to secure messages. They get one on one training by our Clinical Informatics Specialist.
  - Support staff (MAs and reception staff) get trained to enroll and help target population send their first secured message
  - Providers are asked to encourage patients to look for lab results in portal
- What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  - Incorporate portal into new employee orientation
  - Evaluate ability for all providers to send/receive messages

# The Good, The Bad...



- What is working...
  - Invest in portal branding
  - Report monthly on metrics and set up incentives
- What is not working...
  - Patients who enroll through Otech are not getting MyCare email.
  - Portal goes down
- One question I have for the group...
  - If you are on NextGen, are you interested in collaborating to develop an app?





# Venice Family Clinic

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# Who We Are



- Where We Are Located: Venice, CA
- Number of Clinics in the Organization: 10 clinical sites
- Total Number of FTE Providers: ~35
- Date Portal First Went Live: November 2014
- Portal Vendor: NextGen (NextMD)
- Target Population the First 6 Months: Diabetics & Teens





# Patient Training: Now and Future



- What Patient Portal Training Do You Do Now for Patients?
  - If the patient needs training right now:
    - Healthcare navigators are available in the waiting room to orient the patients to the portal and its functions
  - Permanent - long term training plan in place now:
    - We would like to expand training to include classes for patients.
- What Patient Portal Training Do You Plan in the Future for Patients?
  - Continue with healthcare navigators, more online resources (videos, etc.), and scheduled classes.



# Provider/Staff Training: Now and Future



- What Patient Portal Training Do You Do Now for Providers and Staff?
  - If the provider or staff member needs training right now:
    - We have completed department trainings, and staff are oriented by EHR trainers during onboarding
  - Permanent - long term training plan in place now:
- What Patient Portal Training Do You Plan in the Future for Providers and Staff?
  - Ongoing portal trainings, Identify super-users, include structured training in the onboarding process



# The Good, The Bad...



- What is working...
  - Sharing portal functions with frontline staff
  - Call center and coordinators learning and troubleshooting as they go
- What is not working...
  - Not a lot of portal expertise at front desk
  - Only a handful of providers utilizing portal as a tool to communicate with patients
- One question I have for the group...
  - How do you train on the portal during onboarding



# Questions?



# Contact Us



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