Shasta CHC Patient Portal

CPCA Webinar
Charles Kitzman, MMI
CIO Shasta Community Health Center

Vital Signs

- 40 FT Provider FQHC
- Live on NEXTGEN HEALTHCARE since May 2007
- 140,000 encounters annually
- Multiple services
  - Primary Care – Residency 3-3-3
  - NP/PA Post Graduate Fellowship
  - Pediatrics
  - Primary Care Neuropsychiatry
  - Urgent Care
  - 2 Homeless Vans
  - Integrated Behavioral Health/ISAP/MAT
  - Various Specialties – Rheumatology, Podiatry, Neurology, etc

- and a partridge in a pear tree…..

About your host

* SCHC CIO 2010-Current

* MMI - Northwestern University

* 19 years in Technology field

* Likes long walks on the beach, candlelit dinners and puppies.

Timeline and Numbers

- Went live Oct 2011 – Phased Approach

- Communications→Refills→Appointments→PHR →Interactive Forms→ Bill Payer

- 29182 Enrollees (Including Declinations)

- 3000 Super Users >3 uses since signing up

- > 97K messages handled

- 6371 appointment requests

- 7846 Medication refill requests

What shall we talk about?

deployment

findings/hurdles

progress

forward
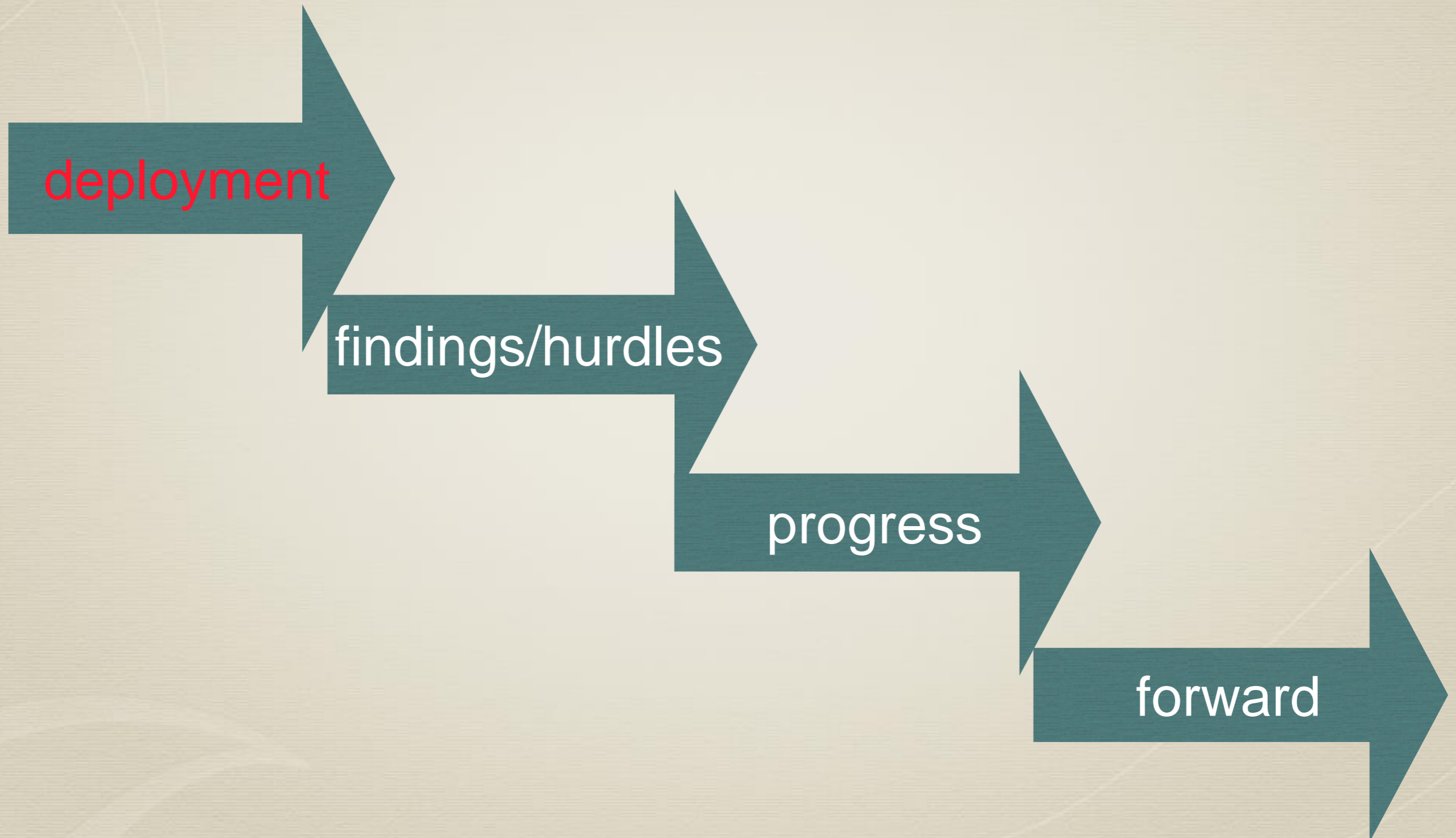
Benefits

Drivers

❑ **Meaningful Use**
- Electronic access to health records

❑ **Patient Centered Medical Home**
- Patient-centered health IT and analytic tools

❑ **Health Reform** ★
- Strategic differentiator for patient engagement

Benefits

❑**Patients:**
- Conveniently view personal health information
- Request / schedule appointments
- Communicate securely with providers
- Links to credible info

❑**Clinics Providers:**
- Administrative efficiencies (less calls)
- Push routine tasks to care team
- More time for critical patients

Barriers

❑ **Patients:**
- "Digital Divide"
- Literacy ★
- Language
- Privacy concerns

❑ **Providers:**
- Potential for added work
- Lack of reimbursement
- Inappropriate use by patients
- Liability for security breaches

Testing the waters

✳ Perceptions were way off!!! Pre-project patient surveys indicated a 65% willingness to use a portal for contacting the health center.

✳ Work | Home | Public Library | Family | Friends

Funding

Licensing, Time, Talent, Training

*Give your conscience an alibi!! - "MU will cover it."

The Gods Smiled Down Upon Us

Selected for PPI project

1 of 3 cohorts

Extremely *Valuable* Experience

TONS of Resources

Website Available

http://www.chcf.org/patient-portals

Jim Meyers DrPH, MHA, FACHE

CALIFORNIA
HEALTHCARE
FOUNDATION

How's it Work?

✳ Uses Patient email as point of contact (optional)

   ✳ Less likely to change than a physical address/phone

   ✳ Notifications are sent to email prompting patient to visit the portal

✳ Functionality = Basic Communications, Medication refill requests, Appointment requests, Forms*

✳ Can send documents created by EMR/Scans through portal unidirectional

✳ Try to make the phone ring less

Our Approach

✳ Targeted Populations (DM, EIS, ADHD etc)

✳ Quickly scratched that for a Full Court Press!!

  ✳ Summer Students willing to help!

  ✳ Lobby, Exam Rooms, Post Visit. - Orientation/Bribes

✳ Providers were not originally directly involved at all.

  ✳ High Ratio of RN to Providers

  ✳ Already overwhelmed/Non-emergency type messages

✳ PCMH - MU

What are we talking about?

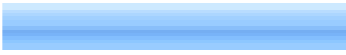deployment

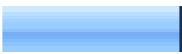findings/hurdles

progress

forward

Patients

Better at this than we thought

Deliberate form of communication

Supply enough detail

Thankful for service

Appropriate use

Expectations

✳ Respond within 2 business days *or better*

✳ Keep communication methods congruent

✳ Can request but not *make* appointments

✳ Establish trust in the tools by exceeding expectations

✳ Solicit input via surveys and advisory groups

4. In the past 6 months, how many times did you send an e-mail to SCHC staff or your doctor?

		Response Percent	Response Count
None		30.4%	14
1		30.4%	14
2		15.2%	7
3		10.9%	5
4		13.0%	6
5		0.0%	0
More than 5 times		0.0%	0
		answered question	46
		skipped question	2
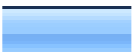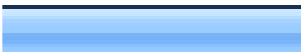
6. If you emailed SCHC in the past 6 months, what was your reason for doing so? (check all that apply)

		Response Percent	Response Count
Make or change an appointment		51.7%	15
Ask for a referral		3.4%	1
Refill prescriptions		34.5%	10
Ask about lab results		13.8%	4
Ask a question		44.8%	13
Other reason:		13.8%	4
	answered question		29
	skipped question		19

7. If you emailed SCHC in the past 6 months, what is your overall rating of this email communication?

		Response Percent	Response Count
Poor		13.3%	4
Fair		10.0%	3
Good		20.0%	6
Very Good		26.7%	8
Excellent		30.0%	9
	answered question		30
	skipped question		18

8. How many times have you used NextMD Patient Portal in the past 6 months?

		Response Percent	Response Count
Never		6.4%	3
1		10.6%	5
2		25.5%	12
3		25.5%	12
4		12.8%	6
5		6.4%	3
More than 5 times		12.8%	6
		answered question	47
		skipped question	1

9. If you used NextMD Patient Portal in the past 6 months, for which services did you use it? (check all that apply)
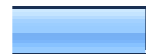
	Response Percent	Response Count
Communicate with doctor or nurse	69.8%	30
Refill prescriptions	32.6%	14
View health records	9.3%	4
Find information about a health issue	18.6%	8
Request a referral	2.3%	1
View lab results	4.7%	2
Make or change an appointment	46.5%	20
Pay a bill	0.0%	0
Other: _____	23.3%	10
answered question		43
skipped question		5
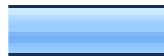
10. If you used NextMD Patient Portal in the past 6 months, what is your overall rating of it?

		Response Percent	Response Count
Poor		6.8%	3
Fair		11.4%	5
Good		15.9%	7
Very Good		29.5%	13
Excellent		36.4%	16
	answered question		44
	skipped question		4

11. Did using NextMD Patient Portal save you a call to the SCHC in the past 6 months?

	Response Percent	Response Count
Yes	80.4%	37
No	15.2%	7
I did not use NextMD Patient Portal in the past 6 months	4.3%	2
answered question		46
skipped question		2

18. In general, how would you rate your overall health?

		Response Percent	Response Count
Poor		12.8%	6
Fair		29.8%	14
Good		29.8%	14
Very Good		23.4%	11
Excellent		4.3%	2
		answered question	47
		skipped question	1

22. What is the highest grade or level of school that you have completed?

	Response Percent	Response Count
8th grade or less	0.0%	0
Some high school, but did not graduate	2.1%	1
High school graduate or GED	21.3%	10
Some college or 2-year degree	53.2%	25
4-year college graduate	14.9%	7
More than 4-year college degree	8.5%	4
answered question		47
skipped question		1

Patient Advisory

✳ Cross Pollinate the group by gender, age, experience

✳ ICF Homes - Possibility

✳ Congruence is desired

✳ Timely responses

✳ Transportation savings/Hassle factor

✳ Ex. Izzy records, Jury Notes

Obstacles

✳ How to manage minor confidentiality

✳ Promoting use

✳ Issues with user security (nurse)

✳ Lack of analytics from vendor

✳ Labs/PHR

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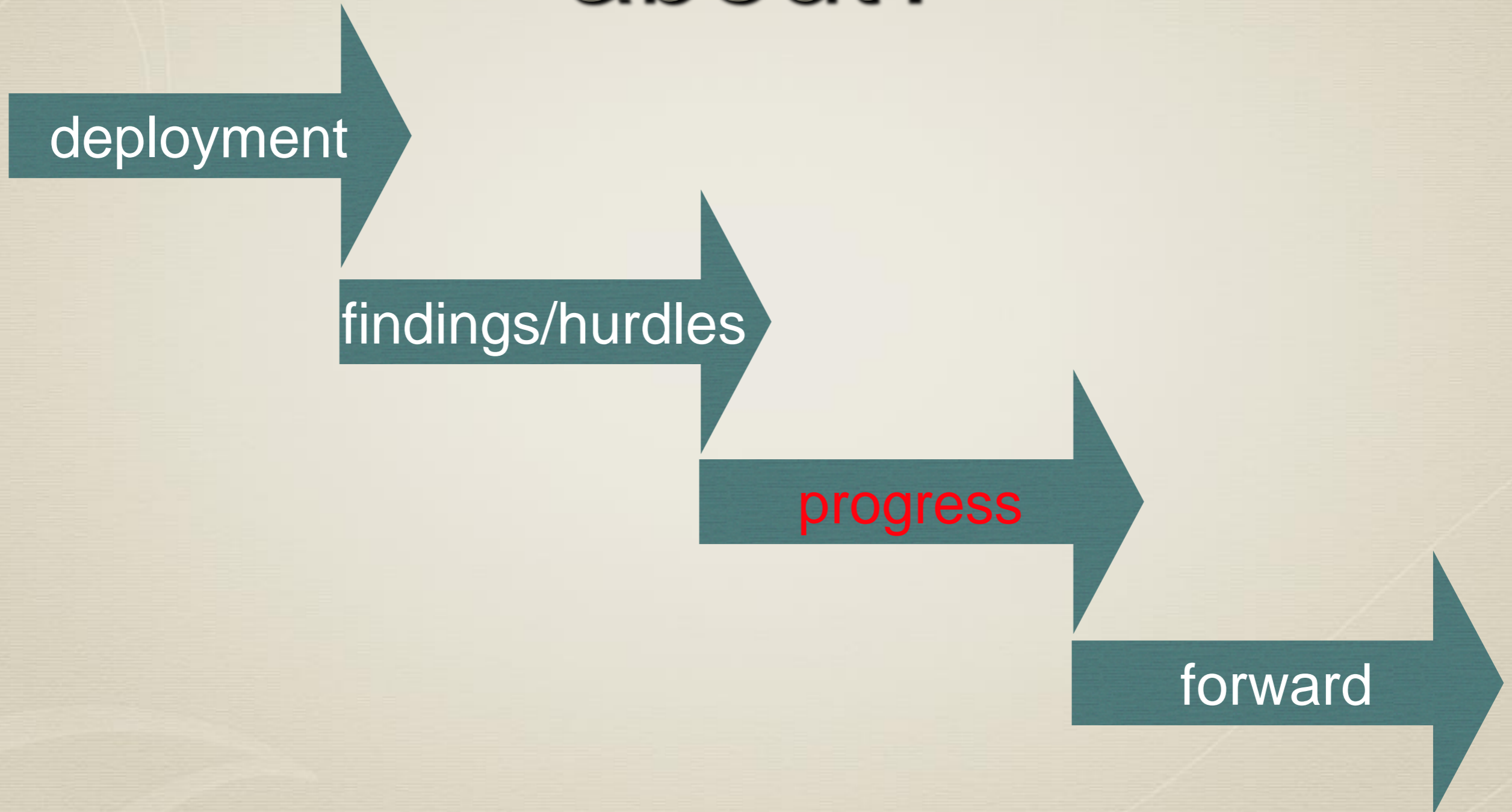
- Posters
- Pins
- Facebook
- PublicWebsite
- Instructional Videos
- Brochures
- Intake Packets
- Scribes? Providers? Nurses?
- Portal Coordinator

Monitoring

| | 1 | of 1 | | 100% | | Find | Next |

NextMD Cycletimes

Responder	Responses	Avg Cycle Time
Hunt, Kimberly	90	0 day(s) 03:39:00
Kitzman, Charles	36	0 day(s) 09:59:00
Speed, Brenda	16	0 day(s) 07:30:00
Johnson, Kristi	13	0 day(s) 18:09:00
Stoute, Landi	11	0 day(s) 23:56:00
Villalobos, Joe	6	0 day(s) 18:18:00
Hendrix, Myra	5	0 day(s) 04:58:00
Valentine, Jonathan	5	0 day(s) 03:40:00
Stewart, Christine	5	0 day(s) 03:36:00
Roach, Ann	3	0 day(s) 01:17:00
Merrill, Johnna	2	2 day(s) 05:20:00
Selbo, Tracy	2	0 day(s) 11:37:00
Melger, Jessica	2	0 day(s) 00:05:00
Beech, Tatum	1	3 day(s) 18:02:00
Choate, Jacqueline	1	0 day(s) 01:35:00

Tracking

Ascherman FNP Harold					
⊞ 12 or Younger	0	0	0	0	39
⊞ 13 to 18	0	0	0	0	42
⊞ 19 to 30	5	3	2	0	134
⊞ 31 to 40	0	16	23	1	169
⊞ 41 to 50	7	32	30	6	178
⊞ 51 to 60	1	8	8	4	229
⊞ Over 60	8	32	32	5	219
Total	21	91	95	16	1010

Davainis MD Paul					
⊞ 12 or Younger	0	3	3	2	79
⊞ 13 to 18	0	0	0	0	22
⊞ 19 to 30	0	3	0	0	23
⊞ 31 to 40	0	1	0	0	16
⊞ 41 to 50	0	1	3	0	25
⊞ 51 to 60	0	1	3	0	59
⊞ Over 60	0	1	2	4	68
Total	0	10	11	6	292

Utilization

Display Utilization by **Age Range** ▼   Start Date **8/1/2014**

End Date **10/18/2014**

| ◄◄ | ◄ | 1 | of 1 | ▷ | ▷| | 100% ▼ | | Find | Next |

NextMD Utilization

Age Range		Appointment Requests	Communications Received	Communications Initiated	Medication Refill Requests	Registered Users
⊞ 12 or Younger	Total	2	14	15	12	5755
⊞ 13 to 18	Total	1	4	5	0	2284
⊞ 19 to 30	Total	22	68	66	18	3800
⊞ 31 to 40	Total	23	140	185	27	2894
⊞ 41 to 50	Total	59	249	265	51	2712
⊞ 51 to 60	Total	52	333	340	67	3323
⊞ Over 60	Total	25	333	358	49	3301
Total		184	1141	1234	224	24069

Responder Name	Count Responses	Avg Cycle Time Conv
Clinic Wide	1002	0 day(s) 14:51:00

Not all portals are created equal

✳ NextMD

✳ eClinical Works

eClinicalWeb
Schedule. Prescribe. Chart. Charge.

Questions/Concerns
- 🧑 Ask Doctor

Messages
- 📥 Inbox
- 📤 Sent Messages
- ✖ Deleted Messages

Account Information
- 👥 Personal Information
- 👥 Additional Information
- 👥 Reset Password

Intake Forms
- 📂 Questions/concerns for next office visit
- 📂 Past Medical History
- 📂 Surgical and Allergies

Review
- Lab / Diagnostic Reports
- Patient Education
- Current Statement
- Past Statement
- Referrals
- PHR-Complete Report
- PHR-View

Appointments
- 📅 New Appointment
- Current Appointment
- Historical Appointments

Requests
- Lab Request
- Referral Request

Welcome Russian River Health Center Test,

West County Health Centers is pleased to offer you our Patient Portal. The Patient Portal is a tool that all view appointments, change your personal demographic information, view your medical history, and fill c medical needs or concerns. If you have a true medical emergency, call 911 or call your local police or fi provider or Care Team, please call the office directly.

⊙ **Please remember that this service is for non-urgent communications only!**
If you have an emergency needing clinical care, please dial **911**.

Personal Health Record

🗂 **Request your PHR**

Messages

✉ You have 4 new message(s)

eClinicalWeb

Schedule. Prescribe. Chart. Charge.

Questions/Concerns

👤 Ask Doctor

Messages

📨 Inbox

📨 Sent Messages

✕ Deleted Messages

Account Information

👥 Personal Information

👥 Additional Information

👥 Reset Password

Intake Forms

📁 Questions/concerns for next office visit

📁 Past Medical History

📁 Surgical and Allergies

Review

➕ Lab / Diagnostic Reports

📋 Patient Education

📇 Current Statement

📇 Past Statement

📋 Referrals

📋 PHR-Complete Report

🗑 PHR-View

Appointments

📅 New Appointment

📅 Current Appointment

📅 Historical Appointments

| Questions/concerns for next office visit | Past Medical History |

Please enter your concerns or questions for your next

Web Portal

I would like to discuss the following items at my next office visit: #1

[   ]

#2

[   ]

#3

[   ]

#4

[   ]

#5

[   ]

Submit

health portal

Dashboard
My Account
Messages
Medical Records
Appointments
Questionnaires
Trackers

Hi Parker,

Welcome to the Patient Portal at Santa Cruz Community Health Centers! DO NOT attempt to access emergency care through this online patient portal. If you think you are having an emergency requiring urgent medical attention, CALL 911 or go to the closest Emergency Room. If you are unsure whether you are experiencing a true medical emergency, please call us at (831) 427-3500 We are excited to introduce to you an exciting new advancement in the management of your health care. As a patient, you play a key role in managing your care. Through the Online Patient Portal, you will have instant access to selected lab results, past visit summaries, current and upcoming appointments, as well as education materials from your healthcare provider. You can also request new appointments, and send messages to your care team quickly and securely! We hope that you find the Online Patient Portal to be easy to use and reliable as we partner with you in improving your health care experience. Please do not hesitate to ask our staff at your next visit if you have questions, concerns, or reccomendations. You can also call us at (831) 427-3500 during regular business hours. We will do our best to respond to all messages and requests within 5 business days, however you

3 Taking	**CURRENT MEDICATION**	👁 View All

Melatonin 1 MG	Once a day
Ultram(TraMADol HCl) 50 MG	every 6 hrs
Ibuprofen 200 MG	every 6 hrs

Request Refill

1 New	**LATEST LAB RESULTS**	👁 View All

A1C (In House) 8.1	01/23/2018

MEDICAL RECORDS	👁 View All

Personal Health Record can be requested by clicking on the Request PHR below

Request PHR

View Medical Records

Details

.SANTA CRUZ WOMENS HEALTH CTR

Elisa Breton, MD TEST

Family Medicine

Address:
250 LOCUST STREET ,SANTA CRUZ, CA 950603813

Tel:
831-427-3500

Fax:
831-457-2486

RESULT

Patient
Parker Wood

DOB
03/29/1997

Address
222 QUARRY LN, , SANTA CRUZ, CA 95060-2061

Phone
559-375-5069

Ordered Date
01/23/2018

Test Name
A1C (In House)

Assessments
Diabetes

Name	Value	Reference Range
Hemoglobin A1c	**8.1**	**<5.7 - % of total**

Result
8.1

Notes

Received Date
01/30/2018

health portal

Dashboard

My Account

Messages

Medical Records

Appointments

Questionnaires

Trackers

📃 **REMINDERS**

| Reminders | CDSS |

Test Name	Last Done	Due
FLUZONE/(pur)NVFC P-FREE FLU 6-35 mos, 0.25ml		Currently Due

↻   ◁ ◁◁ | Page 1 of 1 | ▷▷ ▷   View 1 - 1 of 1

Reminders

CDSS Alerts

   CDSS Alerts

Track...

📑 REMINDERS

Reminders   CDSS

Measure Name	Status	Last Done/Due
Smoking status	Non-Compliant	Due: 09/06/2016
Body Mass Index	Non-Compliant	Due: 09/06/2016
Alcohol use screening	Non-Compliant	Due: 09/06/2016

⟳ |◁ ◁◁   Page 1 of 1   ▷▷ ▷| View 1 - 3 of 3

Dashboard

My Account

Messages

Medical Records

Appointments

Questionnaires

Trackers

← → ⟳ ⓘ https://mycw112.ecwcloud.com/portal15359/jsp/jspnew/trackers.jsp?mainNav=Alerts&pgId=trackers

⦿ Apps | ▤ Managed bookmarks | ▨ Clinic Data | Powered | ⦿ WellPartner | G Gmail | ▤ chickens | ▤ Midcentry Modern | ▤ Clay | ▤ Dashboards | ▤ Ecuador | ▤ eCW | ▤ Excel Tips | ▤ HIPAA | ▤ PCMH | ▤ R Studio | ▤ Spring Bird trip | ▤ Recipes | ▤ Span

health portal

⌂ Home   ⊙ Welcome Parker   ⊕ Cambie a Español

Dashboard	My Trackers	**All Trackers**		Search steps devices	🔍

My Account

Messages

Medical Records

Appointments

Questionnaires

Trackers

‹

👣 Steps | 🚶 Distance | 🔥 Calories | ⏱ BMI | ⏰ Sleep | ❤ Heart Rate | 💓 Blood Pressure | 🧗 Floors | 🍎 Blood Glucose | ⏱ Activity

›

If you do not own or plan to purchase one of these wellness devices,
you can still manually enter data directly into one of our free healow trackers.

Yes, I want to manually track Steps

Devices that track Steps

Fitbit charge 2
The Charge 2 is equipped with SmartTrack...

$129.95   🛒 BUY

Already Have a Fitbit Account?   Setup

Also tracks 🔥 🚶 ⛰ ▢ ⏱

Fitbit Flex 2
Fitbit flex 2 is the most iconic tracker...

$79.95   🛒 BUY

Already Have a Fitbit Account?   Setup

Also tracks 🔥 🚶 ▢

QUESTIONNAIRE

| New Patient History | Patient Health Questionnare (PHQ-9) | SC health Centers Behavioral Health Questionnaire |

Thank you for choosing Santa Cruz Community Health Centers! Please complete this survey to the best of your ability so we can help provide you with the best care. After all, noone knows your health and health history better than yourself!

General:

Today's Date:

[_____] 📅 (mm/dd/yyyy)

Your Date of Birth:

[_____] (mm/dd/yyyy)

What is the main purpose of today's visit?

[_____]

Other concerns (if applicable):

[_____]

In general, how would you rate your overall health?
- ○ Excellent
- ○ Very Good
- ● Good
- ○ Fair
- ○ Poor

[Submit and Next >>]

eClinicalWorks[10]

Patient Portal Settings
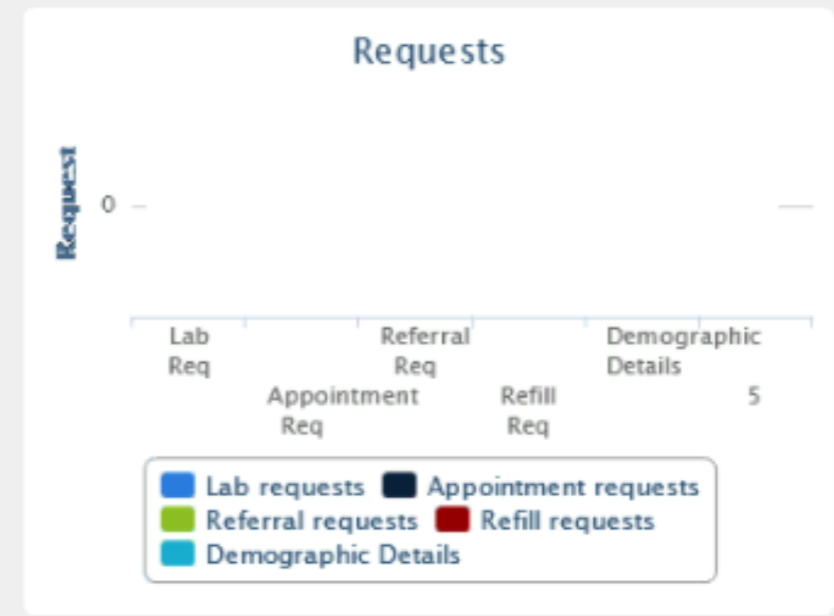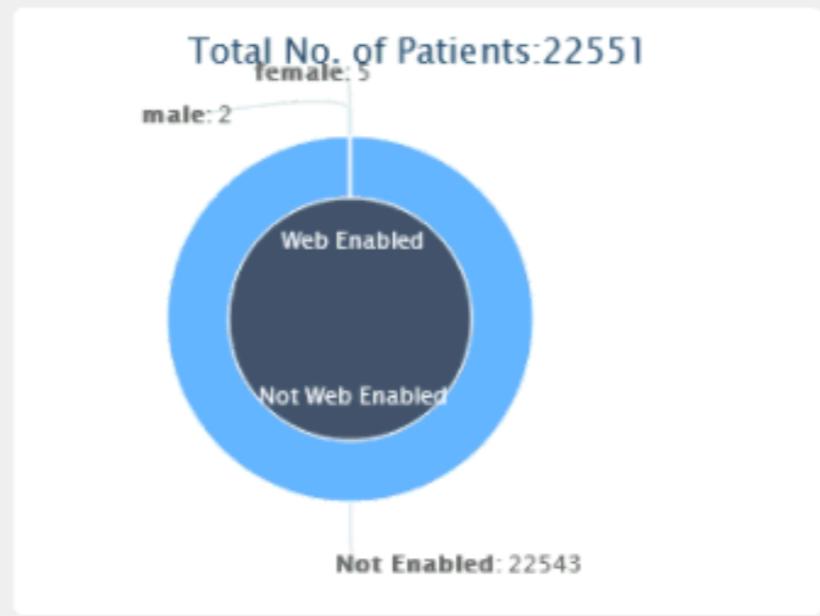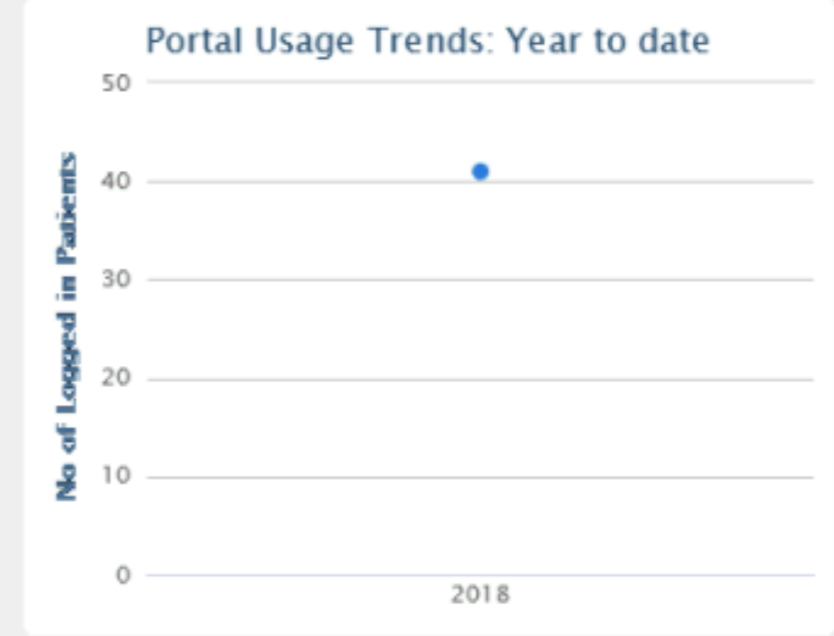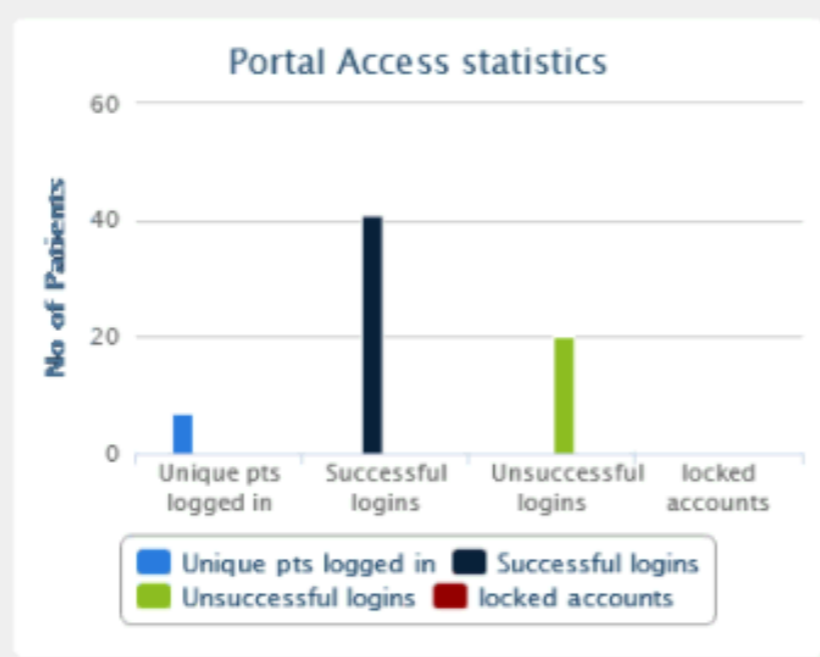
PHM Setup

Content Distrib...

Patient Portal S...

Product Activati...

Resources

User Logs

Chronic Care A...

Order Set Confi...

eCW P2P Admi...

Content Distrib...

CQW Admin

Practice

PHM

healow

Registry

Referrals

Messages

Patient Portal Settings	Admin Dashboard	Batch web Enable/Disable

Notification Logs

Sent eMails Logs

eMail Failures Logs

Portal Customization

Site Builder

Responsible Party Settings

Access Logs

Health Record Access Logs

Lab Access Logs

Statement Access Logs

Patient Access Logs

Locked Accnts

Unsubscribed User List

Switch to List

Portal Access statistics

Legend: Unique pts logged in · Successful logins · Unsuccessful logins · locked accounts

X-axis: Unique pts logged in, Successful logins, Unsuccessful logins, locked accounts
Y-axis: No of Patients (0–60)

Portal Usage Trends: Year to date

Y-axis: No of Logged in Patients (0–50)
X-axis: 2018

Total No. of Patients:22551

female: 5
male: 2
Web Enabled
Not Web Enabled
Not Enabled: 22543

Requests

Legend: Lab requests · Appointment requests · Referral requests · Refill requests · Demographic Details

X-axis: Lab Req, Appointment Req, Referral Req, Refill Req, Demographic Details — 5
Y-axis: Request (0)

Portal Usage Areas

X-axis: Labs, Statements, Messages from practice, Messages to practice
Y-axis: Viewed (0–5)

Portal Notification statistics

X-axis: Appointment Reminder, Appointment Confirmation, Lab Notification, Message Notification
Y-axis: No of Patients (0–4)

Notes on eCW

New upgrade has Spanish 11E
PHR does not auto-update – must be requested by patient
PHR can be downloaded as .pdf or as CCDA
Provider notes on lab results do appear in the portal
Bulk messages are possible
Forms can be created to be proactive on some UDS/HEDIS measures Ex. PHQ-2 Some glitches remain
Data for portal not available to end-users even if locally hosted
Patients can update demographic info from portal

Best – Tracker has potential, FITBit integration
Worst – Analytics piece is limited.

What did we talk about?
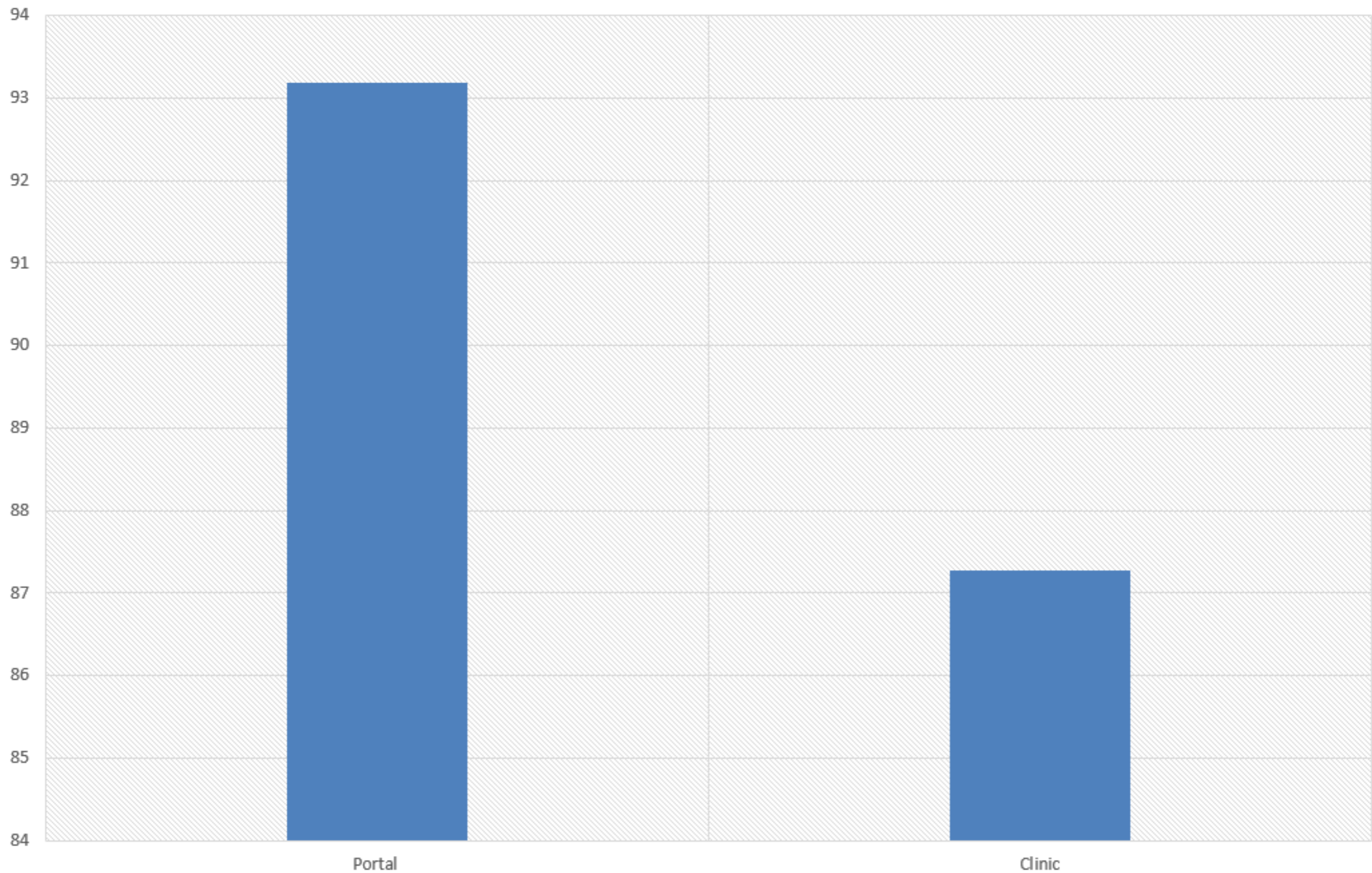
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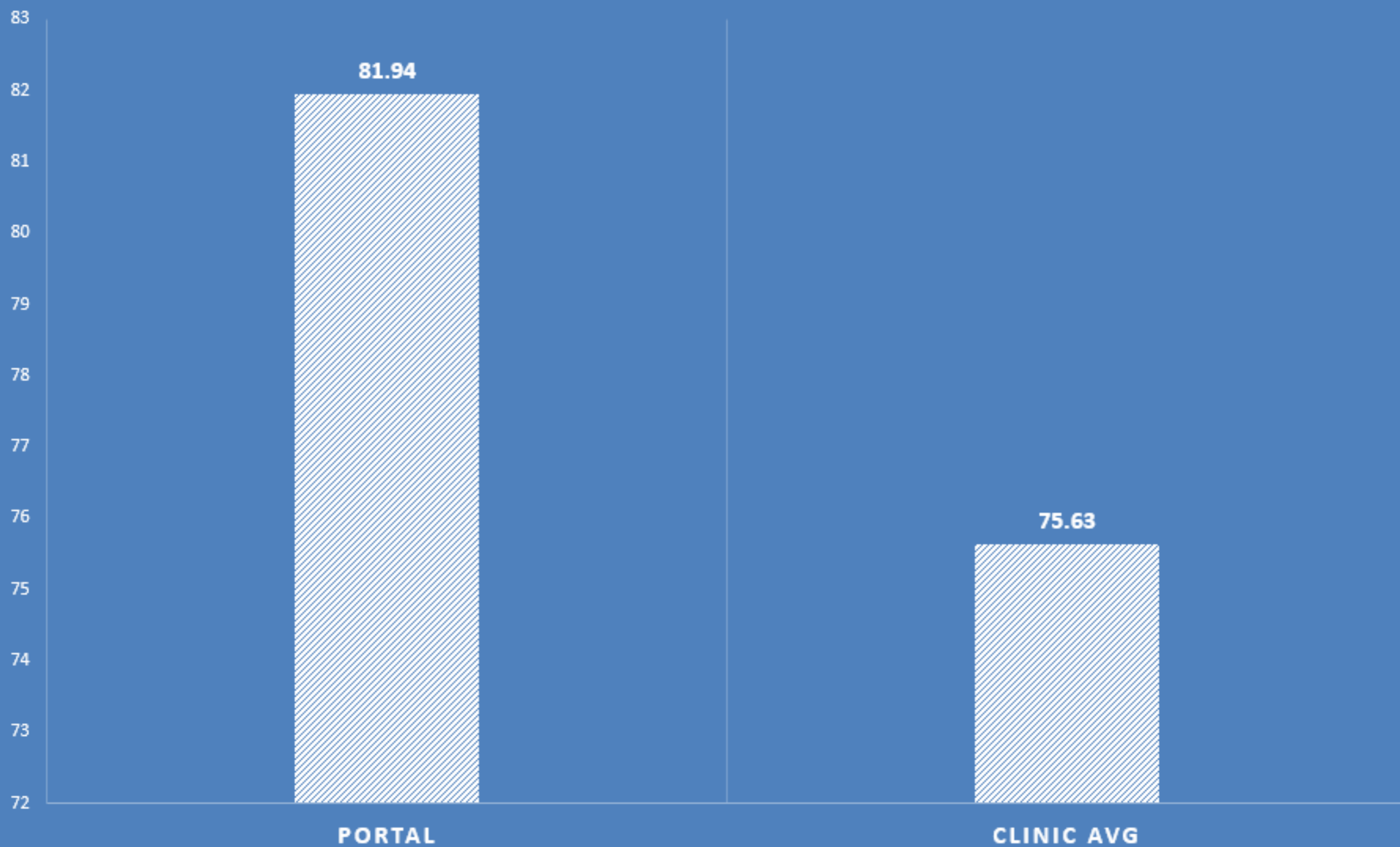
findings/hurdles

progress

forward

Here to stay......

* Slow climb/be patient - Even the best systems took time – Kaiser took 12 years to get to 30% use

* Expect greater mobile device integration in the future

* Is PCMH possible without one?

* Providers carry most weight in promoting the tool

Outcomes
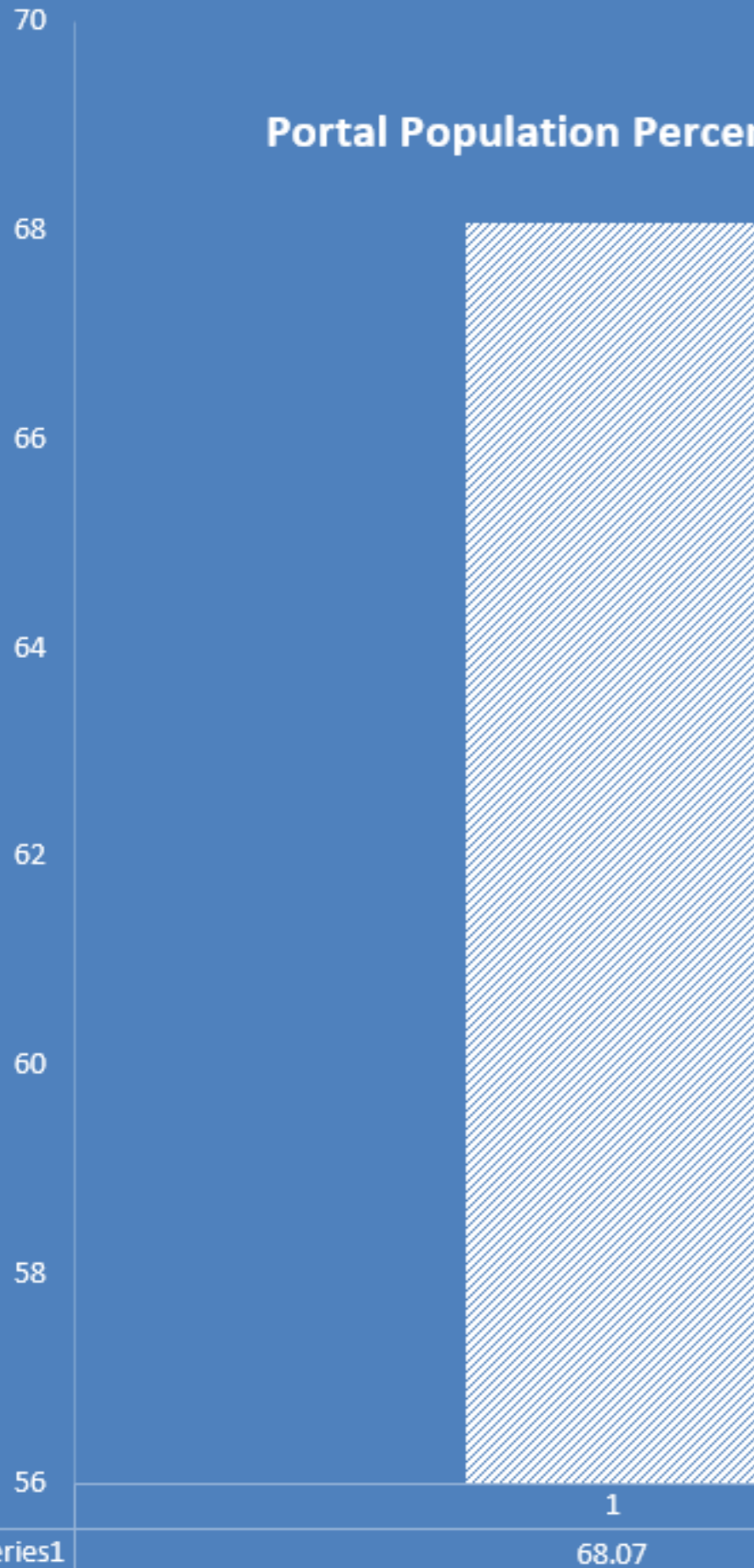
LAB COMPLIANCE
PORTAL COHORT VS. CLINIC AVERAGE
BIGGER IS BETTER

	PORTAL	CLINIC AVG
	81.94	75.63
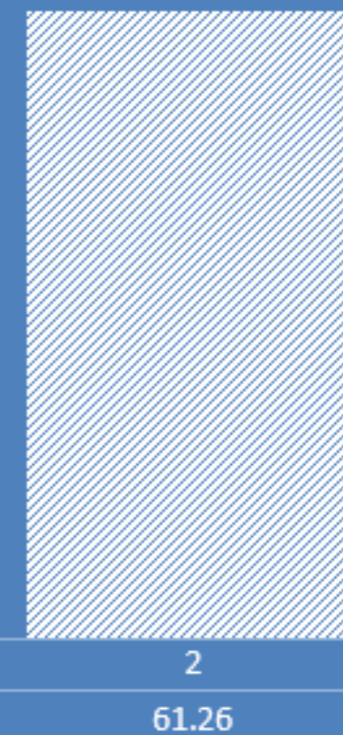
Advice/Takeaways

✳ Route messages using existing workflows

✳ Establish trust in the system by answering ASAP

✳ Compare tools and challenge vendors

✳ Engage clinicians to help promote the product

✳ Monitor and analyze for trends/build canned responses

Thanks for listening.....

Questions?