



Best Practices for Effective Patient Portals

Improve Practice Performance
With Enhanced Communication Capabilities

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Expect Amazing Results

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A Gateway to Better Patient Communications

In science-fiction movies, a portal is a gateway to another dimension. It is entered with a bit of trepidation, but also a lot of anticipation. Who knows what adventures wait on the other side?

In medical practices, portals might not sound as exciting as the movie version, but they do have the ability to transport patients to a world of better communication with their healthcare providers. That is good news for the patients, and great news for the practices as well.

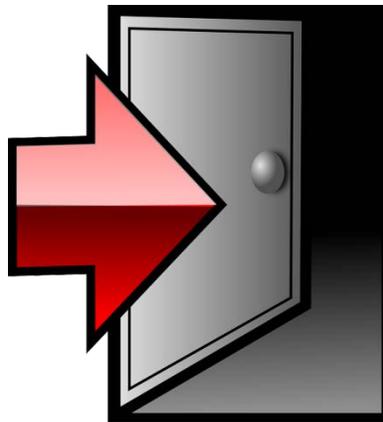
According to the official website of The Office of the National Coordinator for Health Information Technology (HealthIT.gov):

“A patient portal is a secure online website that gives patients convenient, 24-hour access to personal health information from anywhere with an Internet connection.”

Patients use portals to review and remind themselves of healthcare details such as appointments, discharge summaries, medications, immunizations, and lab results. In some cases the portal can be used to provide secure communications with the healthcare provider, request prescription refills, schedule non-emergency appointments, download and submit forms, update contact information, check insurance benefits, and review educational materials.

While the overall goal is to have patients become more engaged in, and educated about, their own healthcare, medical practices are also required to improve patients’ use of electronic health information by virtue of the [21st Century Cures Act](#), which was enacted into law on December 13, 2016. Practices seeking to maximize payments under MIPS, the Medicare value-based care payment program, are already seeing the benefits of incorporating the electronic exchange of information as part of the “Promoting Interoperability” performance measure.

On the practice side, the portal can save time and reduce administrative tasks, while improving the quality of the patient visit. Instead of spending time on endless logistics during an appointment, the provider can focus on engaging and educating the patient about his or her personal needs. This white paper is designed to open the door to a better understanding of the best practices for effective patient portals.



Basics of Implementing a Patient Portal

According to a [Medical Economics](#) article on patient portals, patients today receive care from other sources in addition to their primary care physician, such as an urgent care center or a practice that focuses on a particular form of care such as a cancer center or a pain management clinic. With the digital age advancing at a rapid pace, patients are demanding technology that consolidates all their health information into one easily accessible location that they can access whenever it is opportune for them.

For their convenience and sense of control, they will begin to look more and more for primary providers who are onboard with their technology focus. That is why it makes so much sense for medical practices to take the steps necessary to implement an effective patient communication portal. If you are just beginning on the road to creating a patient portal, you'll want to take into consideration your patient population, your practice culture, and available time and financial resources. Some key considerations include:



- **Set clear portal priorities:** Don't just jump into the idea of having a portal without first spending the time to consider what you want it to accomplish for your practice and your patients. Do the necessary research to determine what is possible, and then make decisions as to what is realistic for your individual situation.
- **Develop a list of desired features and benefits:** Based on your research you can develop a list of potential features and benefits to include into your portal. Then conduct an informal poll of staff, patients, and other practices to determine which of these are most crucial, so you can set an order of implementation to include the most important features at the outset and phase others in as time and resources allow.
- **Think about a rollout:** Do you initially want to make the portal available to all patients, or just a select group as a beta test? The initial patients would agree to provide input and honest assessments of the portal's effectiveness, and you would then be expected to make the appropriate adaptations. It might take a little longer, but it could be well worth it if the process results in a portal that is truly engaging.
- **Look outside the logistics:** While the most involved part of the process might be the actual development and implementation, you also have to think about how you will get your staff onboard with using the portal and set aside resources to educate your patients about it as well.
- **Trouble-shooting:** As with all new protocols, there are bound to be some initial bumps along the way. Have a plan in place to address these as they arise. Perhaps one or two staff members can be appointed as a kind of quick response team that is responsible for assessing the situation, determining alternative adaptations, implementing the necessary changes, and clearly communicating any changes to all stakeholder groups.

With foresight and a proper plan in hand, the design and rollout of the patient portal should be a manageable experience for the entire practice.

Best Practices for Effective Patient Portals

As your medical practice develops the framework for a new communication approach, here are some of the best practices to keep in mind for an effective patient portal:

- **It has to be easy to use:** Users expect everything they do on the internet to be fast and easy. If it's not, they get frustrated and move on to something else. Even the most experienced computer user gets angry at a site that does not operate efficiently. That is why it is so important for your initial test group to share their honest opinions, and for you to take action on that input. It does no good to spend a lot of time and effort creating a patient portal that nobody wants to use.
- **Make it mobile:** Keep in mind that these days most of your patients are going to access your portal via a mobile device, which requires a slightly different thought process. Make sure you specifically ask your test group to access the portal from a mobile device, so they can share their user experience with you.
- **Communication is the key:** This is not some type of secret project that is to be developed behind closed doors. Communicate early and often with staff and patients about what you are doing so you can get their input. Start building interest so the buy-in will be easier once the complete portal is online.
- **Choose features carefully:** In addition to providing access to the EHR, you'll want to be sure to have a portal that is truly utile to your patients. Take some time to consider what is important to your patient population, but also keep in mind that additional features might increase development time and add to the cost as well. Some features are just plain "nice to have," while others are truly important to the smooth functioning of your office. Do you want to start simply with viewing health data and maintaining health records, or is it important to be able to conduct all of your practice communications through the portal?
- **Be responsive:** If patients are using the portal to accomplish medical tasks that involve your staff, then that activity needs to be accommodated within the office structure. If a patient accesses the portal to ask for a prescription refill, wants to change an appointment, or asks a question, somebody needs to respond to that request in a timely manner or the patient will go back to old habits and reach for the telephone again.
- **Consider providing education:** A portal can be much more than a place where patients perform specific tasks; it can be an education center as well. Add helpful information, diet tips, connections to support groups, and medical articles that will help your patients take better control of their own health. You can write your own content, pay somebody to do it for you, or use prepared content from trusted resources. For example, the [Office of Disease Prevention and Health Promotion](#) lists a number of available resources you can access to help motivate your patients to take steps toward healthier lifestyles.

And, finally, **make sure it gets used!** As with anything new, patients might be reluctant to start accessing the new portal. They might be afraid or embarrassed about their computer skills, or might just forget about it and resort to their old habits. It's your job to get them involved and inspired. Here are some of the actions you can take to make sure your patient portal is a big success:

- Get your staff involved - train them about its benefits so they can assure the patients.
- Have an in-office demo so patients can see how easy it is, or ask them to sign up right when they are in the office for an appointment.
- Promote it heavily - put up signs in your office, mention it on your voicemail, include information in any billing or written patient communications, and be sure to talk about it on your website, blog and social media. If you have email addresses for patients, you can send updates there as well.
- Talk about it during the visit – say you will send results through the portal so the patient doesn't have to call, or tell patients how easy it is to update their information

Make sure everyone realizes how they benefit from using the portal!

Practice Benefits from an Effective Patient Portal

A patient portal isn't just for patients – it can also have many benefits for your practice, such as:

- **Reduced phone calls:** Patients won't have to call the office for routine transactions they can now handle through the portal. This will save a lot of office time just answering the telephone.
- **Clearer communications:** No more worrying about messy handwriting or hearing difficulties. Precise communications from the practice and patient can be achieved using the portal and secure messaging features.
- **Kept appointments:** Patients with portals are less likely to forget their appointments, because they can be easily reminded through the portal.
- **Increased patient involvement:** Patients become more actively involved in their own healthcare, forming a stronger partnership with the medical care team.
- **Office efficiency:** Patients can use the portal to complete administrative tasks that typically require the time of several staff members. Making appointments, requesting prescription refills, and updating the medical history are all tasks which the patient can handle now, thereby freeing up office staff for other functions.
- **Better practice profits:** Although there is some initial expense in formulating and implementing a patient portal, the long-term cost savings in terms of increased efficiency and reduced administrative tasks will far outweigh the initial investment.

Amazing Charts – An Ally in Improving Practice Management

Amazing Charts, a Harris Healthcare Company, is a software developer in the small group practice vertical with products that include Practice Management software for patient records, scheduling, billing and claims submission and Electronic Medical Records which house the patient visit, medications, diagnosis, and allergies information. We also offer multiple add-on options for better patient care such as CQM, Patient Notification, Patient Payment Options, CCM, Patient Engagement and Patient Care Gaps software.

Our company provides self-directed training, personalized training and in-depth Customer Support for all aspects of program implementation and utilization. Look for regional educational/user conferences to help users realize maximum user results from all the Amazing Charts products.

We offer a range of solutions for any practice regardless of size, specialty or budget. We offer a low cost – easy to use basic option as well as multifaceted systems to manage all the components of your office structure. If your practice is ready to move effective patient portals, better billing practices, increased patient satisfaction, and increased profits, contact Amazing Charts today for further information, or visit the website at <https://www.AmazingCharts.com> to request a complimentary personalized demonstration.



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