## Continuous Improvement Toolkit

# Patient Portal

## Learning Objective: *To understand what a patient portal is, what it can do for your practice, and how it will benefit your patients.*

## What is a patient portal?

A patient portal is a secure digital platform that allows patients to access their personal health records and communicate with their general practice.

The patient portal allows patients to:

* Book appointments online
* Access laboratory results
* Order regular prescriptions
* View past immunisations
* Access clinical notes
* Securely message their GP

## Why implement a patient portal?

A patient portal offers convenience to patients and can improve access to care, help patients play a greater role in managing their own care, and supports a patient-centred approach within the practice.

Portals may improve efficiency within your practice as they can reduce paperwork and streamline processes such as repeat prescriptions, appointment reminders and lab results. Increasing portal usage will also reduce the number of calls to receptionists and nurses. The result of this is staff who have more time to focus on the patient.

The critical success factor in implementing a portal is all staff understanding the benefits and reiterating these to patients in every interaction.

## Who does what?

|  |  |
| --- | --- |
| Staff | Role  |
| Receptionists/Administrators | Engage and promote the portal to all patients. |
| Nurses | Engage and promote the portal to all patients. |
| General Practitioners | Engage and promote the portal to all patients. |
| Portal Champion | Leads the implementation and patient uptake of the portal.Engages staff in the process of getting patients registered on the portal.Ensures visual board is up to date with accurate portal data, so that everyone can see goals and successes. |
| Management | Choose a patient portal and work with the vendor to install.Appoint and support a portal champion – someone who is passionate about the portal.Engage team members and show the benefits that having a fully functioning portal will provide the practice and patients. |
| WellSouth | Can assist with developing a portal implementation plan.Discuss the benefits of implementing a patient portal with everyone in the practice.Support the practice with data interpretation from the patient portal. |

## Implementation timeline

Preparation:

* Engage staff around the benefits of implementing a patient portal
* Research patient portal providers: ask other practices about their experience with portals
* Reach out to preferred provider and get patient portal installed
* Appoint a patient portal champion

Month 1:

* Ask vendor to supply training – the portal champion could be trained to show the rest of the team as needed
* Portal champion develops a plan for increasing uptake of the patient portal: WellSouth has good plans you can start with.
* Portal champion engages all staff in the plan and provides training to staff – what portal is, what it can do, how to sign up. This way everyone a patient could possibly talk to will be well equipped to answer confidently.

Month 2:

* Patient portal is officially launched with communications to patients
* Portal plan is implemented which pushes all staff members to engage with patients at every opportunity to increase patient portal numbers

Ongoing:

* Staff continue to engage patients and push for increased portal registrations
* Data is used to make informed decisions on the continued implementation of the portal
* Processes are reviewed to maximise efficiency using the functionality of the portal
* Staff and patients could be surveyed about the impact the patient portal has had

## Patients

A communications plan to patients should be included as part of the portal implementation plan. This will detail how your practice will communicate the benefits of the portal, and how to register and activate it. This may include:

* Website, maybe include a link so patients can sign up directly
* Social media
* Telephone message
* Posters in the waiting room
* Leaflets at reception (some practices have receptionists in t-shirts promoting portal!)
* Radio adverts
* Working with other community providers to promote

Patients should be engaged at every opportunity within the practice to register for the portal, and the registration process should be as simple as possible.

## How to measure success

The primary measure of success is the number of patients you have activated on the portal, and if you achieve the number of activations set out in your plan. A good aim is to get to >40% of your eligible enrolled population: at about this point benefits within the practice such as increased nurse availability due to a reduction in phone calls will be noticed.

Another measure of success is the number of patients using different functionality within the portal: the portals have reports you can see this information in. Patient surveys or engagement groups can also be used to measure the impact the portal has had on patients’ experience.

## Helpful Tips

* The patient portal is most effective when all functionality is turned on.
* Secure messaging is not something to fear. The patient is going to get in contact anyway, this is just the most efficient way for them to do so. *Same work, done differently.*
* The most effective way to increase the number of patients registered on the portal is to get the patient’s own GP to promote. GP can say that this is now how the patient will receive their lab results, and to sign up on the way out.
* *Incentivise your staff!* Healthy competition amongst staff is good. Make a competition of who can sign the most people up to the portal in a week and the winner gets a bottle of wine/box of chocolates.
* Patients may register for the portal but not complete their activation. The best way is to get them to activate in the practice. If this is not possible the portal plan should detail how these patients will be proactively followed up so they can start to use the portal.
* The portal implementation plan should detail the practice targets for the number of registered patients at the end of 1 month, 3 months, 6 months, and 1 year.
* The year 1 goal should be 40% of your patient population. Benefits to the practice are only seen when at least 40% of patients are registered and actively using the portal. *Keep going!*

## Further Resources

Video of Prue talking about secure messaging/portal???

<https://www.healthnavigator.org.nz/clinicians/o/opennotes/>

Continuous Improvement Toolkit: Visual Board