How to Select a Patient Portal

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The patient portal can be a highly efficient and cost-effective way to communicate with patients. Also, these online applications can provide a platform for meeting some measures of the government's meaningful use (MU) program—giving ophthalmology practices extra incentive to consider the purchase of a patient portal.

What's available? "Vendors want to differentiate their products from competitors. They are looking to capitalize on the patient portal for patient services purposes as well as to facilitate documentation within the practice," said president and principal consultant of Sterling Solutions, Ron Sterling, CPA, MBA.

Selecting a patient portal that integrates easily with your existing hardware and software is key—but, with all the options available now, how does a practice make an informed decision about which portal to purchase? Start by considering your goals and then evaluate how easy (or difficult) it will be to integrate particular portals with your existing systems. Keep in mind that implementing a patient portal will involve adjustments to your practice's workflow.

What Are Your Goals?

Although some basic operational characteristics overlap between practices, each has its own distinct needs and unique workflows that should be assessed and addressed prior to portal selection. Do you simply want to meet the MU requirements, or would you prefer to partake in all that a patient portal has to offer? If you plan to incorporate a lot of functions into your portal, do you go live with all those features at the same time or is your strategy to start small, with just a few functioning features, and slowly integrate additional capabilities once you are sure those earlier features are working effectively?

"We use our patient portal solely for the purpose of meeting the MU requirements and have been successful thus far in doing so. We never wanted to have patients make appointments or payments online—that was not our goal," said Fairview Eye Center practice administrator, Mary Becka, whose Ohio practice began its search for a patient portal in 2010.

Beyond MU, decide what else you need. Apart from the functionality needed to meet the requirements of the MU program—from secure messaging to providing access to clinical summaries—patient portal vendors also offer additional features that can improve your practice's efficiency (and bottom line). Decide, for instance, whether you want patients to use the portal to complete their new patient registration paperwork, update their demographic information, check their medication list, request appointments, and pay bills.

What About Interfacing?

As software continues to improve, some practices are recognizing that their existing patient portal may not have been the best choice or that it is no longer the ideal option.

The challenge of integrating multiple systems. "Not all interfaces are created equal," said Mr. Sterling, who emphasized that it is very difficult to combine electronic information generated from different systems—specifically, electronic health records (EHRs), the practice management system (PMS), and the patient portal. He explained that 5 or 6 years ago, "there were several patient portal vendors that were regularly used by a number of EHR products. However, you can no longer choose the best of breed and 'bubble gum' these pieces together on your own. It is just not a good idea. Nowadays, the best-case scenario is to purchase these electronic products from one vendor. In doing so, a single vendor will complete the entire setup for you, as opposed to having multiple vendors working in tandem to integrate the systems properly."

Denise Fridl, COT, COE, the chief performance officer at Asheville Eye Associates in North Carolina, said that her practice recently switched from a third-party patient portal vendor due to rising software subscription costs and the inability of their systems to interoperate seamlessly. "We had numerous complications with our original portal because we had 3 systems operating on the same server that did not integrate and communicate with each other fluidly," she said. "Every time we installed a software update, we encountered problems related to the portal."

Talk to your current vendor(s). The first thing to do before selecting a portal is to determine whether the EHR vendor offers a proprietary patient portal. If not, see which products can be successfully interfaced with your EHR system.

Communication is key. "All of your systems must be able to communicate with each other," said Ms. Becka. "If they do not, you will spend a lot of money to accomplish this. Start with your EHR and/or PMS vendor(s) and find out which patient portal vendor(s) they work with. Your selection may be limited, but this is really the only way to choose a portal that will not cause you long-term complications." At Ms. Becka's practice, they are using a patient portal that was recommended by their EHR vendor. "The initial setup was easy for us because our EHR system was integrated with a patient portal that our EHR vendor customarily works with. And we did not incorporate the portal right away because we always wait until a product has been thoroughly vetted before we move forward."

Look at the big picture. "Both our PMS and EHR vendors offer a patient portal," said Ms. Fridl. "We met with one vendor, and although their product was able to meet the MU requirements, it was too basic for what we wanted. After meeting with the other vendor for a demonstration, we found that its portal met all of our needs." Of course, Ms. Fridl's practice was already familiar with this vendor's customer service—and was pleased with it. "Next, we contacted other practices in our area and found that all of the physicians we typically share patients with use this portal; this enables us to exchange patient records with them easily when necessary. That was a huge turning point in our decision, and we felt like selecting the software that offered these enhanced capabilities was the best choice for us."

Rethink Your Workflow

Evaluate and modify your practice's workflow patterns. Each task that can be accomplished through your patient portal will result in corresponding operational changes within your practice. "Practices must rethink their approach to patient service. In order to facilitate this, consider all of the ways that you interact with patients and how you are going to address their issues on a timely basis, and all the while document due diligence," Mr. Sterling recommended.

Be willing to revise your plan. "Trying to figure out how to add a portal into our office flow was a challenge, and we experienced some hiccups along the way," said Ms. Becka. "Asking patients to provide their email address was the primary hurdle we had to overcome. In the beginning, we explained the procedure for portal registration and asked our patients to set up their own account. This morphed into the technician assisting the patient with the registration process during appointments. This approach has been a great success, but it took us some time to find the best solution for our practice."

Be vigilant for teething problems. "Within an hour of activating our portal's appointment reminder feature, we had to turn it off," said Ms. Fridl. "The problem was that the confirmation button was missing from the message that was sent to our patients, and we became inundated with confirmation calls." Fortunately, they were able to fix that glitch quite quickly, and the portal's confirmation feature has subsequently proved to be a significant time-saver for the reception staff.

Make sure your staff members know what to expect. Small blips in software programming can easily turn into large-scale issues. "Make sure that everything you send to your patients through your portal is correct—both in format and appearance," advised Ms. Fridl. Before you turn on your portal and actually go live, conduct some mock exams and do some test runs with the features you will be using so your staff can see exactly what the patient is going to see.

Be mindful of HIPAA rules. Certified EHRs have built-in tools that enable you to comply with HIPAA security and privacy issues. "This does not mean in a de facto way that you are using the patient portal in a HIPAA-compliant manner. For example, the system requires that a password be used for access, but if the password is not kept secure or a user fails to log out, patient information may be compromised," said Mr. Sterling. Be mindful of HIPAA regulations during your workflow redesign to eliminate these risks. ■

Ms. Becka is the practice administrator at Fairview Eye Center in Fairview Park, Ohio, and an AAOE board member. Relevant financial disclosures: None.

Ms. Fridl is the chief performance officer at Asheville Eye Associates in Asheville, N.C. Relevant financial disclosures: None.

Mr. Sterling is the president and principal consultant of Sterling Solutions, a consultancy based in Silver Spring, Md. Relevant financial disclosures: None.

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Patient Portals and the Patient Service Strategy (407). Ronald Sterling, CPA, MBA (senior instructor). **When:** Monday, Nov. 16, 9:00-10:00 a.m. **Where:** Casanova 505. **Access:** Academy Plus course pass required.