
PRACTICE PERFECT

INFORMATION TECHNOLOGY

Patient Portals, Part 3: 10 Ways to Get Patients Online

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INTERVIEWING DENISE FRIDL, COT, COE, JANNA MULLANEY, COE, COT, OCS,
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You created a robust, user-friendly portal for your practice that includes all of the latest and greatest bells and whistles. Next, you need to get patients into the habit of using it. This could be a particular challenge for ophthalmologists, whose patients tend to be older and less at ease with technology than the patients of other specialists. Nevertheless, you'll need to get patients using your portal once you reach Stage 2 of the government's incentive program for meaningful use (MU) of electronic health records, so it's wise to start early. Three practice managers share 10 tactics that they have used to boost usage of their patient portals.

Use Written Materials

Your plan to promote your portal should include creating new promotional materials and updating existing paperwork.

1. Before your portal launches, use signs to prepare your patients. "One of the most important lessons we have learned while making significant

changes in our practice is to inform our patients prior to the change," said Janna Mullaney, COE, COT, OCS. In order to accomplish this, "we place posters in the elevators, display table tents in the waiting room, and hang signs on the back of our exam room doors that say: 'What's Next,'" she said. This signage includes the expected launch date and a testimonial about why the change is beneficial to their patients. Ms. Mullaney is chief operations officer at Katzen Eye Group & Aesthetics by Katzen.

2. Create a brochure promoting your portal. Ms. Mullaney's practice created a "very simple, large-print, black-and-white brochure that notified our patients that we had new components of our electronic system available. It described the latest features and how to access them."

3. Any document that you give to patients could be an opportunity to promote your portal. "The new patient packet offers a good opportunity to educate your patients about what your portal can do and all of the advantages it has to offer," said Oregon Eye Consultants administrator Joy Woodke, COE, OCS. Billing statements are also an ideal place to promote your portal. "Our patients have really come to appreciate the convenience of using the online bill payment feature, which is advertised on our billing statements. It simply includes a brief statement that

notifies our patients that they can pay their bill online through our portal," said Ms. Woodke. By accessing the online bill payment system, patients are passively exposed to the other available features, thus creating a 'soft' contact form of portal promotion.

Your Staff Members Are Key

It takes some time for patients to appreciate all of the benefits a portal has to offer and to use it on a regular basis. Consistent education of your patients by your office staff is one of the most effective and cost-efficient ways to promote your portal. For the best chance of success, make portal promotion a part of your staff members' regular routines, and consider using incentives to reward them for their efforts.

4. Make promoting the portal a routine part of patient interactions. Initially, Asheville Eye Associates chief performance officer Denise Fridl, COT, COE, thought that they would have one person in the practice—the scribe who escorts the patient out at the end of the appointment—intro-

Got Tips?

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duce and discuss the portal with their patients. However, they have found that it is more effective to make this discussion a recurring part of patient interactions: “When patients call for an appointment, we tell them that they can make an appointment online through our patient portal, which will automatically send them an appointment reminder. We also explain that they can complete or review their history online, which will help expedite their appointment. After each appointment, we send our patients an e-mail that requests that they preregister for their next appointment through our portal. At this time, we also remind them that they can access their clinical summary online. And patients who are prescribed contact lenses are referred to the portal, where they can place orders and view their renewals,” said Ms. Fridl. As a result of this comprehensive promotional strategy, nearly 20 percent of Asheville Eye Associates’ patients are currently using the portal to initiate preregistration, appointment requests, or secure messaging; and the practice is able to communicate electronically with 75 to 80 percent of its patients.

At Ms. Woodke’s practice, staff emphasize the convenience of online clinical summaries. “Our patients are accustomed to us handing them the summary at the end of their visit. In lieu of this, our technicians and scribes will communicate with our patients the new availability of this information online, which is accessible for their review 24/7. Rather than having to save the documentation, they can simply log in and look at their clinical visit summary along with other data like their problem lists or medication lists,” said Ms. Woodke. Instead of printing multiple pages for a patient to pick up, practices can save time and money and increase efficiency by encouraging patients to retrieve this information via the online portal.

5. Use the portal to communicate with staff; this gives employees a sense of the patient’s perspective. Keeping their employees engaged in the process has been the key to success

with portal usage at Ms. Mullaney’s practice. After implementing their patient portal, Ms. Mullaney required every employee to register for the portal and began communicating with them through the portal with updates about office procedures or the acquisition of new equipment, for example, which helped them realize the benefits the portal had to offer.

6. Create a competition among employees. “We gave employees numbered brochures with their names on the back that they distributed to our patients,” said Ms. Mullaney. When patients create an account for the portal, they are asked to type in the staff name and the number from the brochure. “We ran weekly reports to determine how many patients each employee had signed up for the portal and rewarded the employee with the most registrants. The first week, the incentive was a restaurant gift card, and we continued to increase the incentives over time.”

7. Learn from staff accomplishments. “At the end of each week, we announced which staff member had signed up the most patients and asked them to share their techniques,” said Ms. Mullaney. “Successful employees wrote sample scripts based on their experiences that were then used by other staff members with our patients,” she said.

8. Capitalize on staff self-interest. “It was easy for our technicians to promote our portal because they realized how much easier their job became if the patient had completed their registration before their appointment or were able to access their information online. As a result, techs were excited about educating our patients about our portal. When they appreciate the positive effects, the incentive to promote the portal becomes intrinsic,” said Ms. Fridl.

Incentivize Your Patients

Over time, patients will realize it is more convenient to do some tasks online than over the phone or in person, but how do you speed up that transition?

9. Give a monthly prize to portal users. “We are incentivizing our patients by sponsoring a monthly giveaway,” said Ms. Mullaney. “At the end of each month, we run a report of all of our patients who have registered and select a random new enrollee and a random patient who has conducted business through the portal. This way, not only are they rewarded for signing up, but they are also incentivized to continue using the system. Our monthly prize is an iPad. We also offer our patients a 2 percent discount on their self-pay balances when paid through the portal.”

10. Create an app. While some patients may technologically lag behind others, many regularly use smartphones and other mobile devices. Offering the latest technology to this group keeps you on the cutting edge and provides yet another way for your patients to interact with your portal. “We had an app created for our practice that we have been promoting for a couple of years. Our patients can download the app and access our portal and all of its features,” said Ms. Fridl. To promote this new amenity, her practice placed a large sign in their waiting room that said: “Asheville Eye App: Download and make your appointments, preregister, etc.”

Be Creative

Achieving the MU requirements that must be accomplished through portal implementation will not be an easy task. When planning your marketing strategy, consider all of your options, apply a variety of strategies, and be patient. By starting early and taking an innovative approach, your practice can achieve success. ■

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