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## **Patient Engagement: I.T. Takes a Village**

Session 28, March 6, 2018

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Erin Mackay, GetMyHealthData

# COMMITMENT

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# Conflict of Interest

Juana Romero

Has no real or apparent conflicts of interest to report.

# Conflict of Interest

Erin Mackay, MPH

Has no real or apparent conflicts of interest to report.

# Agenda



State of Consumer Data Access



Bright Spot: NYP's Patient Portal Help Desk



Keys to Success & Takeaways



Discussion

# Learning Objectives

- 1) Identify **persistent barriers to patient access** and effective use of their health information.
- 2) Discuss **new approaches and emerging best practices** to engage consumers with their health information online.
- 3) Diagnose common challenges with patient portals and describe **patient experience-centered solutions**.
- 4) Recognize necessary complementary **changes to culture and practice** that will modernize information sharing with patients and families.

## About Us

The **National Partnership for Women & Families** is a nonprofit, nonpartisan advocacy group dedicated to promoting fairness in the workplace, access to quality health care, and policies that help women and men meet the dual demands of work and family. **@NPWF**

**GetMyHealthData** is a National Partnership initiative working to help patients and families access and use their health information and support providers to redesign information sharing processes. **@GetMyHealthData**

**NewYork-Presbyterian** is one of the nation's most comprehensive academic health care delivery systems, dedicated to providing the highest quality, most compassionate care to patients in the New York metropolitan area and throughout the globe. **@nyphospital**

## Refresh: Where Are We?

- **70%** of total office-based physicians and **99%** of hospitals have adopted an electronic health record (EHR)<sup>1,2</sup>
- **\$34.7 billion** in Meaningful Use payments<sup>3</sup>
- **158,000** unique health apps in app stores<sup>4</sup>
- **\$8.1 billion** in investor funding on digital health industry (up from **\$1.1 billion** in 2010)<sup>5</sup>
- **5 years** of individual right to electronic access
- **3+ years** of View/Download/Transmit



### Sources

1. [ONC Office-Based Providers in EHR Incentive Programs](#)
2. [ONC Hospital-Based Providers in EHR Incentive Programs](#)
3. [CMS May 2016 Summary Report](#)
4. [R2G mHealth Economics 2017 Report](#)
5. [Statista Digital Health Industry Funding](#)

## Consumer Pain Points

What happens when people try to access or share health information?

- Confusing request processes
- Outdated delivery methods
- Non-useful formats
- Cultural resistance
- Lack of actionable data
- Excessive fees



# In Their Own Words



**Sources**

[GetMyHealthData Storyboard](#)  
[ONC’s Improving the Health Records Request Process for Patients Report](#)

# Data is for Doctors?

HOME / PATIENT & VISITOR INFORMATION / REQUEST MEDICAL RECORDS

## RELEASE OF INFORMATION DEPARTMENT

Your Medical Records

770-810-8880

Open Monday - Friday, 8 A.M. - 4:30 P.M.  
CLOSED ON HOLIDAYS

According to federal law, patients have the right to get copies of most medical records, whether they are paper copies, or electronic health records. Doctors' notes, medical test results, lab reports and billing information must be supplied to patients if they ask correctly.

The federal law that addresses medical records is called HIPAA, the Health Information Portability Accountability Act.

"Medical providers treat my data as if it were **top secret**. I understand their concern about revealing my data to third parties, but many are reluctant to reveal it to me ... **How can I make informed decisions about my own health if I don't have information?**"  
- Adele Z.



# How Much?!

 SHOW ME THE MONEY



**Charges Prohibitive**

"I never got my records, as I found the charges prohibitive. I don't recall what they were, only that it ...

[Read More](#)

Patient Portal Pricing			
	Basic no cost to you	Gold \$125 a year	Platinum \$250 a year
<b>Appointment Services / Bill Pay</b>			
View Upcoming appointments	✓	✓	✓
Pay bills online	✓	✓	✓
Make appointments		✓	✓
View Appointment History		✓	✓
<b>Labs / Dictations</b>			
Last 60 days of labs / dictations	✓	✓	✓
All labs / All dictations		✓	✓
<b>Medications</b>			
Medication listing		✓	✓
Allergy listing		✓	✓
Free refill requests		✓	✓
<b>Clinical Data / Documents / Referral</b>			
Immunization history		✓	✓
Vitals history		✓	✓
Active problem list		✓	✓

# Now What?



*“My attempt to reconcile three patient portals, CMS Blue Button data, and my Blue Cross health profile. Not an ad for Starbucks, just required a lot of caffeine to handle!” - Jeff H.*



## Bright Spots

- Providers have good intentions
  - Protecting sensitive information is paramount
- Culture is evolving
  - Emerging view: Sharing information improves engagement, introduces efficiencies
- Patient portals have potential
  - Most efficient, timely access
  - Download and transmit capabilities

# NewYork-Presbyterian Portal Journey

- myNYP patient portal dates back to 2009
  - Tech support = Juana. “Always on call.”
- Realization: It takes a village to make the portal work
  - Catalyst: New leadership with patient/family engagement experience
- NYP launched the help desk in 2012
  - Now responds to hundreds of requests each week



“We have awesome, brilliant minds in IT creating great software, but you need to have people with direct patient contact for that human element... someone that can hear the voice of the patient.”  
- Juana Romero

# NYP's Patient Portal Help Desk

- TODAY: Help desk is run by 4 FTE who speak English, Spanish and Chinese
  - Use interpretation services to address additional language needs
- Responds to 120–160 requests each week
  - While volume of requests has gone down over time, the complexity has gone up
  - Staff spend more time trying to fix problems



# How it Works

## Online:

- Preferred method so staff can track and respond to requests
- Individuals submit a request form →

## By Phone:

- Patients can speak to a customer service representative Monday through Friday from noon to 5:00 p.m. ET
- Leave a voicemail outside that time (translated for email delivery)

The screenshot shows a web form titled "CONTACT SUPPORT". It contains the following fields and options:

- First Name:** Text input field with a user icon.
- Last Name:** Text input field.
- Date of Birth:** Text input field with a calendar icon, containing the placeholder "MM/DD/YYYY".
- Phone Number:** Text input field.
- Email Address:** Text input field.
- Preferred Method of Contact:** Radio buttons for "Phone" and "Email", with "Email" selected.
- How Can We Help?:** A dropdown menu with "Select one" at the top and a list of options: "Compliment", "Issue with my User ID and password", "Patient Invite", "Unable to Match to my Records", "Unable to View my Medical Records", and "Other".
- Please Provide Details:** A text area for additional information.
- Buttons:** "SUBMIT" and "CANCEL" buttons at the bottom.

# Common Patient Requests

- **Technical questions**
- **Administrative issues**
- **Clinical help**
- **Correction and update requests**

“Acknowledge,  
Apologize  
and  
Amend.”

- NYP Help Desk Motto

# Common Patient Requests (cont'd)

## Technical Questions:

*"I can't log into the portal!"*

- Resetting passwords
- Resending registration auto-invitations
- Incorrect email address

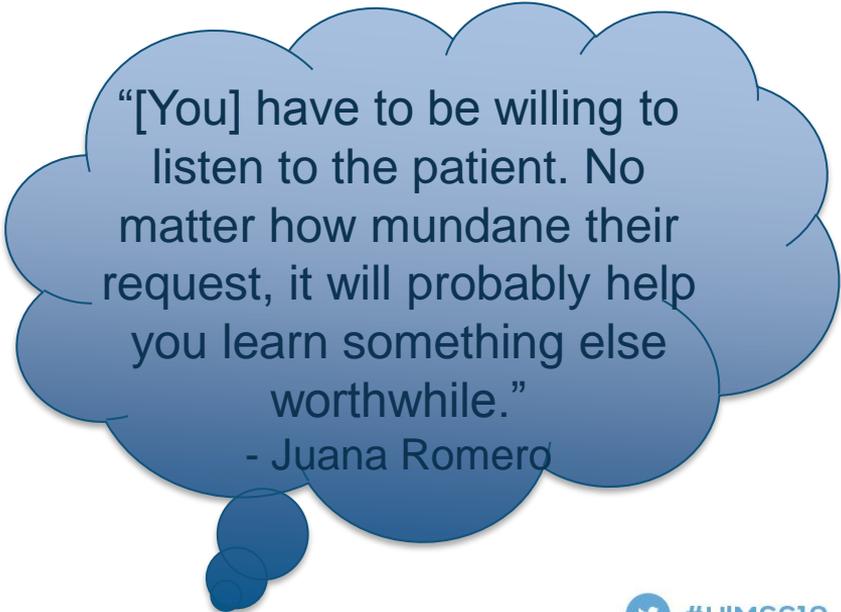


# Common Patient Requests (cont'd)

## Administrative Issues:

*"Why can't I see the records I'm looking for?"*

- Not looking in the right place
- Information not yet available (e.g., lab results)
- Sensitive information not routinely made available on portal
- Billing questions
- Upcoming appointments



"[You] have to be willing to listen to the patient. No matter how mundane their request, it will probably help you learn something else worthwhile."

- Juana Romero

# Common Patient Requests (cont'd)

## Clinical Help:

*“What does this medical jargon mean?”*

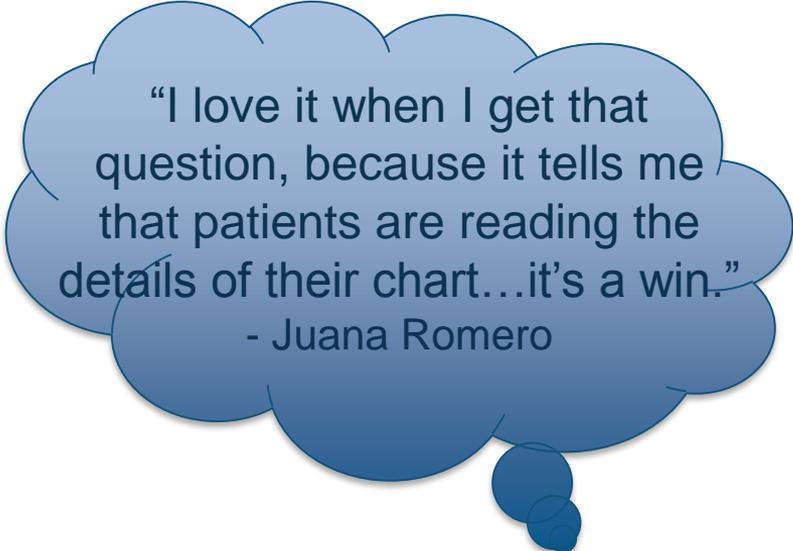
- Interpretation of lab results
- Submitting prescription refill requests



# Common Patient Requests (cont'd)

## Corrections and updates to record:

- Incorrect demographic information (race, ethnicity, etc.)
- Incorrect medical information:
  - *“Who said that I’m a chain smoker; I’ve never been a smoker in my life!”*



“I love it when I get that question, because it tells me that patients are reading the details of their chart...it’s a win.”  
- Juana Romero

# Keys to Success: Implement Standards

- Establish standards for responding to patient requests:
  - NYP help desk staff responds to online requests in 1 to 2 business days whenever possible
  - The team works to resolve the issue at first contact
  - For requests that require more time and coordination, staff tries to resolve in 3 to 5 business days

# Keys to Success: Patient Experience Mindset

- Think about the portal as a patient experience issue rather than an I.T. or compliance issue.
  - Meet regulations but also make sure that patients can understand, use the information.



“The support desk is a worthwhile investment because the patient will always need someone to talk to.”

- Juana Romero

# Takeaways

- **People first**
  - The patient portal is not a self-sufficient machine. There will always be a need for people to help solve technology problems.
- **Set appropriate expectations**
  - Be clear in portal promotional materials and outreach/education efforts about what information will not be available (i.e., sensitive test results, information from other locations).
- **Offer easy, electronic ways to get additional information**
  - Allow patients to request additional data, medical records directly from the portal.
- **View requests for information as an invitation**
  - Sign of patient engagement
  - Encourage and cultivate this tendency

## Discussion

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- Don't forget to complete your online session evaluation!



# Endnotes

1. Office of the National Coordinator for Health Information Technology. (2017, August). *Office-Based Health Care Professionals Participating in the CMS EHR Incentive Programs*. Retrieved 8 December 2017, from <https://dashboard.healthit.gov/quickstats/pages/FIG-Health-Care-Professionals-EHR-Incentive-Programs.php>.
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5. Statista. *Total digital health industry funding worldwide from 2010 to 2016*. Retrieved 8 December 2017, from <https://www.statista.com/statistics/388858/investor-funding-in-digital-health-industry/>.