Patient Portal Introduction and Overview
Control Panel

Audio Options:
- This is a listen-only presentation
- Audio by Phone
  - Select “Use Telephone”
  - Dial the provided number
    - Follow voice prompts
  - You will need to use the Access Code and Audio Pin
  - The Code and Pin are unique to each attendee

Minimizing your Meeting Controls:
- Meeting controls will minimize automatically
- To open & close controls, use the Orange arrow button

Raising your Hand:
- If you have been muted and would like to get the presenter’s attention, use the “Raise Hand” icon.

Asking Questions:
- Questions can be asked using the Questions Panel on the Meeting Controls
- We will attempt to answer all questions at the end of the session.
Agenda

- Background
- Meaningful Use
- Basic Features
- Workflow Functions
- Value Added Implementation
- Next Steps
NextGen® Patient Portal

- Increased Communication between provider & patient
  - Ease & Security
- Highest Used Communication Mediums
  - The internet!
Web Portals - Background

- Around Since Mid ‘90s
  - Part of our everyday lives
    - Financial Institutions (Online Banking, Stock Trading)
    - Government Institutions
    - Online Shopping
  - Healthcare
    - Lagging due to previous lack of incentives & need for HIPAA regulations (both issues now solved)
Why Patient Portals?

- Increasing trend towards seeking information online.
  - Patients want instant access to personal health data, billing information, and communication

- Improve the physician practice efficiency, resulting in improved revenues and reduced expenses
Meaningful Use

- Stage 1 and 2 require use of Patient Portal
  - Enrollment > 50%
  - View/Download PHR > 5%
  - Send secure messages > 5%
INTRO TO PATIENT PORTAL

Requirements & Features
Admin/Back Office Features

- **Scheduling:**
  - Appointment Requests: Receive patient appointment requests specifying available time, specific providers, and other preferences
  - Real Time Booking: Allows patients to enter appointment preferences, search for available appointment times, and book appointments directly from portal

- **Appointment Reminders**
  - Available on home page of Patient Portal

- **Alerts**
  - If practice has recall letters set-up, alerts are available on home page of Patient Portal

- **Online Statements** *NEW FEATURE*
  - EPM system can send electronic copies of patient statements to the Patient Portal. An email notifies patients when a new statement is posted.
  - *Additional fees may apply based on your Patient Portal agreement*

- **Bill Payment** **NEW FEATURE**
  - In conjunction with the Online Statements service, patients can make secure payment with credit card or electronic check
  - **Requires agreement with TransFirst, a third-party Payment Processing Clearinghouse**
Clinical Features

- **Templates (Online Forms)**
  - Streamlined check-in process, reduce waiting times, save on administrative costs associated with paperwork and wasted time
  - Online Forms: Series of template forms that can be completed by the patient and imported into the patient’s EHR chart

- **Prescriptions**
  - Patients can request refills of medications online in a secure manner
  - Patients can view active AND inactive medications, as well as select their preferred pharmacy

- **Uploading Documents and Images**
  - Ability to upload EHR documents and EHR images into the patient’s portal
  - Provides patients with access to key personal health information, such as patient plans, lab results, etc.
  - Documents and Images automatically converted into PDF format
LIVE DEMO
Patient Features

- **Research Center**
  - HealthWise patient research center (patient education resources)

- **Notifications from Practice**
  - Select where patient wants notifications of portal activity to be delivered, email addresses and sms text available
Shared Features

- Secure Messaging
  - Patients can interact with practice staff members
    - For example, can contact administrative staff with billing questions or their care provider(s) to understand their symptoms, resolve episodic issues, and seek guidance
  - Ability to create generic or specific message recipients and establish routing rules
  - Patients receive notifications of portal activity and can set up multiple email addresses and SMS notifications

- Request Health Record
  - Ability to view and download summary of health record
LIVE DEMO
NextGen EPM, EHR, and Patient Portal

WORKFLOW FUNCTIONS
PATIENT PORTAL ENROLLMENTS

Administrators have the ability to determine when enrollments take place.

Options:
- Check in – *(Recommended Option)*
- Check out
- During intake by clinical staff

**It’s always recommended to enroll New Patients and Established patients during scheduling calls**

Items to consider:
- **Volume of patients** checking in or out and which option is the most feasible for your practice
- **Kiosk/computer station** - can assist in enrollment adoption
Patient Portal Kiosk Idea

Courtesy of Tanya Stratford, Practice Manager, Arthritis & Osteoporosis Center
NextMD (Patient Portal) Appointment Types

Administrators have the ability to determine appointment types that are available to be requested or booked per provider from Patient Portal.

Examples of Appointments:
- **Real Time Booking** could be used for physicals, any appointment that has standard scheduling parameters
- **Appointment Requests** can be setup for any types of appointments these go directly to the person(s) determined by the administrator

Items to consider:
- What kinds (categories) of appointments should be available for each provider and each location?
- Which visits use Real Time and which use Requests?
NextMD (Patient Portal) EPM Inbox Workflows

Administrators have the ability to determine which staff members get what types of communications through creation of message routing rules.

For example- Appointment requests go to the front desk and billing questions go to the billing specialist.

Items to consider:
Who gets each kind of message, and do they vary based on provider?
NextMD (Patient Portal) EHR Inbox Workflows

Administrators determine which staff members get what types of communications through creation of message routing rules. EHR normally has users that receive different types of messages than EPM.

For example: Medication refills for Dr. Smith may go to Nurse Betty, and general medical questions may go to all nursing staff.

Items to consider:
Who gets the different kinds of messages, and do they need to vary based on provider?
Standard Responses

Administrators can create their own customized standard responses to a patient’s NextMD (Patient Portal) messages and requests. Automated responses are created in File Maintenance.

For example: When a patient requests an appointment, you could have a standard response for approved and denied appointment requests.

Items to consider:
What messages would have responses that don’t typically change? What would the best response text read?
A New & Redeveloped Client-Centered Approach

Value Added Implementation of NextGen® Patient Portal
Additional Resources

- Demonstration and End User Presentation materials & user guides
- Simple Marketing Suggestions
  - See “Bonus” section of your Portal Guidebook
- All available on our MU Central website
  - [www.tsihealthcare.com/MUCentral](http://www.tsihealthcare.com/MUCentral)
    - Password: success
Client-Centered Outreach

- **Starter Kits**
  - 1000 Informational Literature cards
  - 1000 Reminder Cards
  - Mailed after Core Group Training
- **Also Available**
  - Posters
- **Reorder**
  - Online in the Client Area section of our website
  - Contact helpdesk@tsihealthcare.com for discounted rates
Informational Literature

**NEXTGEN® Patient Portal**

**What is NextGen® Patient Portal?**
NextGen® is an intuitive online patient portal that enables patients and providers to securely access and manage health information and communicate weekly, providing patient/provider interaction and improving patient care.

**With NextGen® Patient Portal, you can:**
- Quickly and securely access your health information
- Instantly request and reschedule appointments
- Reduce wait time by filling out forms online
- Send secure messages to clinical staff
- Easily request prescription refills

**Your life just got easier!**
To learn how to get started today, ask your provider!

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**Life just got easier!**

**Enroll now for free! It’s as easy as 1, 2, 3!**
- Request an Enrollment Token during your visit.
- Click Enroll Now and simply follow the steps.

**Simple to use**
NextGen® Patient Portal is designed with you and your needs in mind. The interface is user-friendly to ensure quick and easy access to your information and your provider.

From the welcome screen onward, www.NextGen.com is easy to navigate and use.

**Ask your provider how to register today!**

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Actual Size: Standard post card
Reminder Cards

**NEXTGEN® Patient Portal**

*It's as easy as 1,2,3!*

**To participate:**
1. Request an **Enrollment Token** during your visit.
2. Visit www.NextMD.com
3. Click **Enroll Now** and simply follow the steps.

**NEXTGEN® Patient Portal**

*Life just got easier!*

**Benefits of using NextGen® Patient Portal:**
- Quickly and securely access your health information
- Reduce wait time before your appointments
- Easier prescription refills
- Instantly request and reschedule appointments
- Send secure messages to clinical staff

**Actual Size: Standard Business Card**
Educational Posters

DID YOU KNOW?
you can fill out forms online before your visit. (and spend less time waiting...)

DID YOU KNOW?
with one click you can request prescription refills online. (and pick them up immediately)

Your life just got easier!

With NextGen® Patient Portal, you can:
- Quickly and securely access your health information
- Instantly request and reschedule appointments
- Reduce wait time by filling out forms online
- Send secure messages to clinical staff
- Easily request prescription refills

+ ask your provider today about participating.

DID YOU KNOW?
you can request and reschedule appointments online at any time (good news for those on the go)

Your life just got easier!

With NextGen® Patient Portal, you can:
- Quickly and securely access your health information
- Instantly request and reschedule appointments
- Reduce wait time by filling out forms online
- Send secure messages to clinical staff
- Easily request prescription refills

+ ask your provider today about participating.
Next Steps

- **Complete “Configuration & Admin Training” Registration Form**
  - Please complete TODAY immediately after this session
  - Link available from our Meaningful Use Central website
    - www.tsihealthcare.com/mucentral
    - Password: success
    - Click Patient Portal Implementation Documents
  - Form will allow practice to select functionality, provide trainer with workflow information, and customize standard responses
  - After submission: TSI staff will process and complete initial set up for the Patient Portal in the system based on information provided on the form

- **Attend Configuration & Admin Training**
  - One-on-one session between practice’s portal team lead(s) and an Patient Portal trainer

- **Attend Core Group Training**
  - Link sent to practice manager

- **Test Portal functionality using Test patients**

- **Attend Testing Follow Up session**

- **Attend Patient Portal End User sessions**
  - Link sent to practice manager

- **Patient Roll-Out**

- **Post Go-Live follow-up**

- **Download Documentation**
  - Demonstration and End User Training slides, user guides, etc.
  - Link available from our Client Area section
    - www.tsihealthcare.com
    - Click Client Area
    - Username: tsiclient Password: tsihealthcare or
    - www.tsihealthcare.com/mucentral
    - Password: success
QUESTIONS?