

# Out with the Old and In with the New: Helping Our Patients Through the Transition!

Reedsburg Area Medical Center • Reedsburg, WI

## Objective

**Engagement, transparency, empowerment, efficiency and satisfaction** are just a few words that have been used to describe the benefits of a patient portal. Reedsburg Area Medical Center (RAMC) has taken on the task of assisting their patients to sign up for a new patient portal site with the implementation of a new electronic health record.

## Background

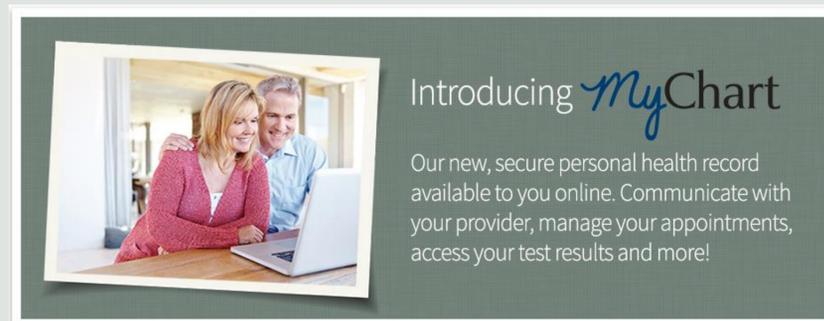
The previous patient portal required patients to access two separate systems; one for the hospital information and one for the clinic information. Both portals had very limited information available. RAMC decided to prioritize a new portal to improve efficiencies and communication. With a new EHR, patients could access more robust information all in one place. Below are the core team staff implementing this work:

- **Kim Garman, Quality Specialist RHIT, CPHQ**
- **Shelly Beschta, Clinic Nurse Manager**
- **Carla Mercer, Director of Marketing**
- **Rita Schara, Director of Patient Safety**
- **Jolene Westerman, Director of Clinic Services**

## Actions Taken

A **Patient Portal Task Force** was developed to identify the tools and resources needed to assist patients with signing up for the new portal. The Task Force met with the vendors to better understand the overall implementation timeline, roles, and responsibilities. It then coordinated with the marketing department, RAMC leadership, quality advisors, and the volunteer services department to adopt a transition plan. The go-live period began on February 24, 2019. Further actions taken are bulleted below:

- iPads were purchased and placed in the clinic registration areas for patients to use to sign up for the portal.
- New fliers and cards were printed and distributed to each patient registration area in the facility.
- Signage was placed strategically throughout the clinic to encourage patients to ask about the new portal.
- Registration staff received education and training, including how to assist patients with activating their portal account.
- The quality specialist was on-site with registration staff during the first two weeks of go-live to provide support with activation, communication, and promotion of the portal to patients.
- Volunteers were enlisted to support patient enrollment and guide them through the process utilizing the new iPads.
- The **Task Force** worked throughout go-live; making changes and providing more training and education where it was indicated.

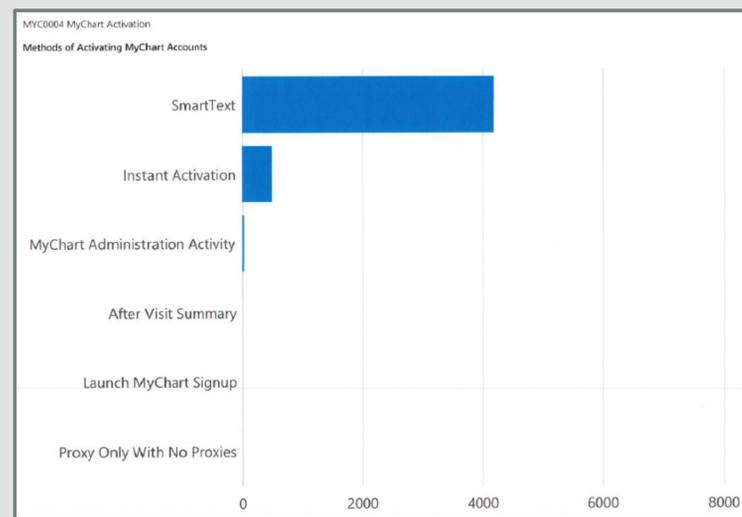


## Metrics

Since the portal adoption and promotion, a total of 5,781 patients signed up in the portal.

**This equates to 53% of patients seen over a 3-month period who have signed up!**

**53% Sign-Up Rate!**



## Analysis

RAMC continues to see an increase in the patient portal activation. Upon further abstraction, RAMC will promote and hope to see even more activation. Re-education of front registration staff is needed to enhance and streamline the current patient portal registration process.

The **benefits found** while implementing a new EHR and patient portal include the following:

- Building EHR vendor relationships that yield additional tips and tricks for staff.
- Experiencing increased efficient communication between the patients and the providers.
- Enhanced patient experience with 24/7 access to health information, to make appointments, and to send secure messages.
- Noticing decreased phone tag between the care teams and the patients.

**Many lessons** were learned along the way, which included the following:

- Abstract patient data and health information from the previous patient portal and imbed it into the new patient portal. RAMC heard from patients that they wanted their older health information available in the new patient portal.
- Be flexible as problems arose, such as updating the portal so patients can communicate directly with their Certified Diabetes Educator.
- Build time into staff schedules for patient education and registration of the portal. Do not expect staff to run their full schedules during go-live.
- Staff training is critical, including hands-on training over multiple timeframes.
- Add specifications and clinic-specific information on EHR and patient portal tip sheets. The ones provided through vendors are too general for staff.

## Next Steps

As RAMC continues to transition patients to the new patient portal, new learning **opportunities continue** to be introduced from both patients and staff. Next steps for the project include the following:

- Complete patient health information abstraction from the previous patient portal, including the addition of a permanent 1.0 FTE and **nursing student volunteers for abstraction purposes**.
- Update the health maintenance capability in the EHR.
- Expand the **volunteer roles** to locate patients in front lobby and enroll them into the patient portal.
- Add further promotion of the patient portal once technical barriers are overcome.
- Share patient portal sign-up data with staff.
- Monitor when registration codes are close to expiring in order to contact patients to sign up before codes expire.