

HIM Best Practices for Managing Patient Portals

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By Anne Dixon, RHIA

The healthcare industry is on the cusp of changing the way providers communicate with their patients. Technology holds great promise in empowering patients to manage their health.

Patient portals are one way organizations can engage patients in their healthcare. They enable communication between physicians and patients and save time and money for the patient, provider, and facility.

More and more HIM professionals and their departments are being put in charge of managing electronic, online patient portals. As such, HIM professionals must understand their role in supporting their facility's patient portal.

At Vanderbilt University Medical Center (VUMC), HIM staff have developed unique roles and established HIM best practices in helping implement the organization's patient portal.

Portal Development and Organization

VUMC developed its patient portal in 2004. A physician director and a portal project manager/administrator oversee the use and development of the portal. A portal committee, which includes staff from IT, marketing, physicians, nurses, billing, legal, risk management, informatics, medical librarians, patient affairs, and the HIM department, meets monthly under the direction of the project manager.

The number of registered users has grown dramatically. In 2006 there were more than 22,000 user accounts. Currently there are more than 165,000. More than 8,000 accounts are for pediatric patients (0–17 years old).

Through the portal the patient (or the patient's parent) can perform a number of tasks:

- Grant other individuals access to their portal account
- Securely send and receive messages to their current VUMC providers
- View many of their labs and radiology reports, vital signs, and immunizations records
- View their medication and allergy lists
- Request appointments with current or new VUMC providers and view existing appointments
- Access the online bill-pay site
- Update their password, e-mail address, and other personal information

Supporting the Portal

A portal is a cooperative effort engaging many departments throughout the facility. Each department plays a role in supporting the program.

Departments at Vanderbilt University Medical Center perform the following roles:

- Programmers and marketing staff release updates to the portal Web site and keep it looking fresh.
- IT keeps the feeds open between the EHR and the portal.
- Providers and triage nurses in all departments and units answer patients' specific clinical questions sent through the portal.
- EHR trainers help train providers and staff on the upgrades and changes to the portal.
- Billing staff answer billing questions sent through the portal.

- Legal staff and the privacy officer help write the Web site usage agreement and policies.
- Risk management, informatics, medical librarians, patient affairs, and others are all at the table helping to constantly improve and update the portal.

The HIM department supports many aspects of the portal development and daily management. HIM professionals continue their strong patient advocate role in assisting patients with fast and easy access to their medical information in the portal arena, just as they do in the release of information arena.

In the future, VUMC is working on enabling:

- Access to more medical reports, such as discharge summaries, operative reports, clinic notes, problem lists, and patient summaries
- Schedule-based medication reminders
- Two-way video conferencing and more areas for patients to self-manage their disease beyond the current blood pressure diary

HIM's Role

Two credentialed HIM professionals at VUMC take care of the daily needs and questions of the patients using the portal. They are responsible for:

- Helping patients who are having problems registering online for an account (patients can come to the department for assistance)
- Helping new employees register for accounts at weekly orientations
- Processing parent's applications for pediatric accounts and creating pediatric accounts (parents must appear in person to gain pediatric account access)
- Answering patient questions that come by phone, e-mail, mail, or direct patient contact
- Responding to assigned helpdesk tickets (e.g., patient questions or problems that come directly through the portal)
- Making service calls to clinics and departments to present a general portal overview at staff meetings or helping train new staff
- Helping to write and update policies, procedures, and application forms
- Resolving patient problems and portal problems with other support areas, such as programmers or IT
- Updating the "Frequently Asked Questions" section of the portal
- Making suggestions for portal improvements, which are often based on commonly received patient questions or comments

HIM professionals become super-users of the portal, which enables them to answer patient questions. When there is a technical problem with the portal they are often the first to be alerted from patient calls for help.

HIM Competencies That Transfer to Patient Portals

HIM professionals have a strong knowledge base in areas that are central to the daily management of the patient-portal interaction and patient access issues. For example, their knowledge of the following domains, which form the basis of the RHIA examination, are easily transferred to the patient portal arena:

- Health data management-develop and maintain organizational policies, procedures, and guidelines for management of health information
- Health statistics and research support-identify and/or respond to the information needs of internal and external healthcare customers
- Information technology and systems-implement and manage use of technology application
- Privacy, security, and confidentiality-design and implement security measures to safeguard protected health information

- Legal and regulatory standards-administer organizational compliance with healthcare information laws, regulations and standards (e.g., audit, report and/or inform)¹

Note

1. AHIMA. "Registered Health Information Administrator (RHIA) Examination Content."

Patient Interaction

From the patient's perspective, HIM professionals manage the portal. HIM staff handle any problems the patients are having with the portal. The HIM staff fills the user-support or "helpdesk" role for the patient.

HIM professionals have intense daily interactions with portal users. HIM professionals must have a clear understanding of how to walk patients through technical problems. Further, they must be able to help patients no matter their level of computer experience-the user may be very tech savvy or barely know how to use a mouse. A phone call or helpdesk ticket may take two minutes or an hour and 15 minutes to resolve.

Typical patient requests include:

- Help registering for an account, logging into the system, or forgotten username or password
- Problems seeing physician messages or sending messages to their physicians
- Help understanding medical information
- Help finding information in the portal (e.g., finding lab results, MRI report)
- Portal access rights (e.g., granting full access to a patient's account, enabling a family member access to an account)
- Correcting errors in their medical records

Interactions with Staff

HIM professionals also triage problems to be resolved. In order to do this successfully they develop a complete understanding of what parts of the portal are supported by which departments. As such they form strong interdepartmental lines of communication.

Typical questions or problems that need to be resolved for staff include:

- Granting full access to a patient
- Registering a patient for an account who has two medical record numbers
- Messaging errors, including the inability to message a patient or questions about how to attach lab results to a message

Portal Challenges

One of the main challenges is balancing the use of staff's time and patient satisfaction. A facility can have the most advanced portal available and it will not help patients if they are unable to get the help they need to use it.

Other challenges include:

- Communication between all departments supporting the portal
- Keeping up with regulatory changes and other changes such as HITECH and making the necessary updates to the portal's policies and procedures
- Prioritizing resources for future development
- Helping clinics and providers reap the benefits of the efficiency the portal can bring to their daily workflow
- Balancing patient need for easy, fast access to the information with keeping the information secure

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