

HIM Engaging the New Frontier of Patient Portals

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Advancement in the practice of medicine has entered its next generation through the launch of new medications, new medical techniques, and most of all new technologies. While many of the advancements impact the provider-patient relationship directly, such as the execution of treatment and diagnosis, other advancements provide for a different type of impact. Such is the case with online patient portals that enable patients to communicate directly with their providers and instantly access health information.

Patients continue to play an increasingly active role in their own healthcare by taking responsibility for the decisions made about them. They have become more informed and are more likely to educate themselves on the things they don't fully understand in healthcare. One technology that has remarkably helped with this change is the growing use of the patient portal. Portals enable communication between physicians and patients and save time and money for the patient, provider, and facility. [\[1\]](#)

Health information management (HIM) professionals have already been at the table to help implement and manage the health information maintained within electronic health record (EHR) systems, so, the natural progression for implementing and managing patient portals has also fallen to HIM in many healthcare organizations.

HIM professionals are very much aware that implementing a patient portal benefits patient care and provider workflow when developed in conjunction with an EHR. However, it is critical that HIM professionals have early involvement in the selection, implementation, and ongoing use of the patient portals, not just the management of its release of information functions.

Typical Portal Functionality Useful, But Limited

Incentive payments that are part of the “meaningful use” EHR Incentive Program are a major driver for many healthcare organizations to purchase and implement patient portals. Patient portals are one of several communication tools that can be used to achieve the federal stage 2 “meaningful use” EHR Incentive Program requirements. [\[2\]](#)

Many patient portals in use today serve only a few core functions:

- Provide patients with an electronic version of the post-visit summary
- Allow access to lab results that have been reviewed and approved for inclusion by a clinician or other staff
- Give patients the ability to request a prescription refill
- Serve as a platform for secure messaging with nurses, physicians, and other office staff
- Offer a list of upcoming appointments, or the ability to review and schedule an appointment online

There are opportunities for a number of additional functionalities to be incorporated into a patient portal. Some of these might include electronic release of information capability, the ability for patients to incorporate a personal health record (PHR) into their provider based health record, or allowing patients to read and request amendments to their EHR.

Engaging patients through a patient portal in a way that will be meaningful to the patient helps improve patient commitment to the organization, provides an opportunity for more effective management of the healthcare record, and assists in timely revenue capture, as well as potentially facilitates the quick removal of erroneous health information. All of these areas of engagement have a direct and positive impact on health information practices in the organization. The portal can also reduce staff time by facilitating a reduction in patient phone calls, reducing the need for paper forms, and promoting a 24/7 operation without the need for onsite staff to assist patients during off hours.

HIM Must Lead Portal Implementation

Portals are often implemented as part of an organizational strategy to improve patient communication and facilitate the coordination of patient care across the healthcare organization. The inclusion of HIM leadership is often an after-thought, and is not considered until the module or product has been installed and documentation or records management difficulties are encountered.

In preparing for implementation, HIM professionals must take the lead through the use of a variety of management and facilitation skills, including:

- Establish a portal implementation team, including stakeholders from across the organization, such as clinical staff, registration and business office staff, and IT staff to design workflows
- Define types of records/information/data to be transmitted through the portal, taking into consideration status, timeframes, and other rules of documentation (i.e., When will information be available in the portal? Will only signed documentation be available?)
- Develop and conduct training sessions for clinicians, nurses, receptionists, HIM staff, and billing/customer service staff
- Identify and gain support from a physician champion that can provide reinforcement and assist in gaining buy-in from physicians, nurses, and other clinicians during and after the conversion
- Engage patients through the creation of brochures, poster boards, and through verbal discussions with patients at the point of registration; HIM professionals can be relocated to patient care areas to assist with portal sign-up during the early post-implementation period

Becoming the Patient Portal Representative

Following implementation of a patient portal, HIM staff should be given the necessary tools and training to provide ongoing maintenance of the portal and support its growth. HIM leadership should consider hiring or appointing patient portal representatives to field calls from patients. The role of the portal representative may include some or all of the following tasks:

1. Answer any phone queries that come in through a dedicated patient portal phone line
2. Ensure resolution of any questions regarding the patient portal functionality and troubleshoot problems with personal identification numbers (PINs) or requests for PIN changes
3. Manage the process for proxy or guarantor access for parents of minors or for caregivers that the patient appoints to oversee the portal on their behalf
4. Quickly respond to any reports of incorrect information and direct patients to the necessary paperwork for changes
5. Review and respond to any requests directed through secure messaging to the HIM department (requests for release of information, restrictions, amendments, updated demographic information, etc.)
6. Facilitate communication with caregivers when test results or other information is not available for patient viewing

About More than Just Meaningful Use

Many physician practices and acute care facilities are anxious to incorporate a patient portal in conjunction with the implementation of an EHR to work toward qualifying for meaningful use incentives. But to ensure long-term success, HIM professionals must continue to provide oversight and management of key portal functionality.

HIM professionals can not only facilitate the organization's long-term strategy for increasing patient communication, but also take the lead in ongoing success of the portal to make sure that the goal of improved patient engagement and improvement in patient care is fulfilled.

AHIMA is currently working with subject matter experts on a Practice Brief providing recommended practices for the implementation and management of patient portals, due to be published in the April 2015 *Journal of AHIMA*. Discussing

operational and managerial needs, identifying stakeholders and system selection, issues and challenges such as the privacy and security of the protected health information within patient portals, and managing proxies and promoting consumer education and engagement will all be addressed within this upcoming Practice Brief.

Notes

[1] Dixon, Anne. "HIM Best Practices for Managing Patient Portals." *Journal of AHIMA* 83, no. 3 (March 2012): 44-46.

[2] Centers for Medicare and Medicaid Services. "Stage 2." www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/Stage_2.html?gclid=CNbq89HVw7oCFewRMwodQ2EAZQ.

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