

12.0 Patient Web Portal

Goal: Patients have access to a web portal enabling patients to access medical information and to have electronic communication with providers

14 total capabilities; 2 retired.

All capabilities applicable to: Adult and Peds patients

Applicable to PCPs and specialists.

Patient web portal is a system that supports two-way, secure, compliant communication between the practice and the patient. For capabilities pertaining to patient's use of portal, practice unit staff must be trained in and have implemented this capability, patients must be able to use it currently, and at least 50% of patients must be actively using the portal.

12.1

Available vendor options for purchasing and implementing a patient web portal system have been evaluated

PCP and Specialist Guidelines:

- a. Assessment of vendor options may be conducted by PO or Practice Unit.

12.2

PO or Practice Unit has assessed liability and safety issues involved in maintaining a patient web portal at any level and developed policies that allow for a safe and efficient exchange of information

PCP and Specialist Guidelines:

RETIRED

- a. Safety issues may include prohibiting electronic communication for emergency situations, etc.
- b. All messages exchanged must be secure and HIPAA compliant.
- c. Attestation of PO is acceptable

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none">• Discuss w/PO implementation plan if not in use, if in use, ask for policies related to use of the portal – must be HIPAA compliant with PHI. Safety issues & emergency scenarios discussed or demonstrated	

12.3

Patients actively request appointments electronically

- a. PCP and Specialist Guidelines: Practice schedules patients and notifies them of their appointment time

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none">• Ask the practice staff to access the portal and demo appointment request, ask how they are notified of request and how they fulfill requests (practice will schedule patients and notify them of their appointment time)• Portal usage log is acceptable demonstration of capability	

12.4

Patients actively log and/or graph results of self-administered tests (e.g., daily blood glucose levels, blood pressure, weight)

PCP and Specialist Guidelines:

- a. Option should be available to patients, recognizing that not all patients will choose to use these tools. Demonstration of use is required

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none">• Patients can log/graph self-administered tests (e.g., glucose log)• Ask the practice staff to pull up a patient example, demo use of tool. Who is responsible for reviewing information received? What does practice do with information on logs/graphs?	

12.5

Providers are automatically alerted by system regarding self-reported patient data that indicates a potential health issue

PCP and Specialist Guidelines:

- a. "Flags" may be set using customized parameters for individuals based on their care needs.

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none">• Ask the practice staff to demo how they are alerted and the process that follows the alert	

12.6

Patients actively participate in E-visits

PCP and Specialist Guidelines:

- a. POs and/or Practice Units have developed and implemented protocol for responding to patient messages/requests for e-visits in a consistent and timely manner (e.g., a triage system), using structured online tools.
- b. Please refer to the AAFP guidelines for e-visits for more information. The guidelines are available here:
<http://www.aafp.org/online/en/home/policy/policies/e/evisits.html>

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • PU to demonstrate how an e-visit would look • Portal usage log is an acceptable demonstration of capability 	

12.7

Providers are routinely using patient portal to electronically send automated care reminders and health education materials.

PCP and Specialist Guidelines:

- a. Both types of communications must be occurring
- b. An automated care reminder is a patient-specific communication, such as a reminder about gaps in care
- c. Information must be actively transmitted to patients (not merely available on website)

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • PU to demo automated care reminder & discuss the process after the reminder is sent - walk through the resources available to the patient via the portal. 	

12.8

Patient portal system has capability for patient to create and update personal health record

PCP and Specialist Guidelines:

- a. Personal health records are created and maintained by patients to improve their health care experience and reduce fragmentation of care, and typically include:
 - i. PCP name and phone number, allergies, including drug allergies, medications, including dosages, chronic health problems, major surgeries, living will or advance directive, family history, immunization history, results of screening tests, cholesterol level and blood pressure, exercise and dietary habits, health goals
 - ii. Content of personal health record may be defined by patient and PO/Practice

Unit, within context of patient portal system, but must contain at least some of the following patient-supplied elements

- Chronic health problems, family history, exercise and dietary habits, health goals
- b. Patients must be actively adding or augmenting existing health information in the portal
 - i. The capability must exist for the patient to add the information themselves directly into the personal health record
 - If patient prefers, information may be given to provider to be entered

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • Demo how the patient creates the health record. 	

12.9

Patients actively review test results electronically

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • Demo of how the patient views the lab/test results • Portal usage log is an acceptable demonstration of capability 	

12.10

Patients actively request prescription renewals electronically

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • Demo of Rx request & process that follows • Portal usage log is an acceptable demonstration of capability 	

12.11

Patients actively graph and analyze results of self-administered tests for self-management support

PCP and Specialist Guidelines:

- a. Option should be available to patients, recognizing that not all patients will choose to use these tools

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • Demo of graphing results and how this info is used at point of care 	

12.12

Patients actively view registries and/or electronic health records online that contain patient personal health information that has been reviewed and released by the provider and/or practice

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • Demo of how the patient accesses the medical record & what info is available to them 	

12.13

Patients actively schedule appointments electronically through an interactive calendar

PCP and Specialist Guidelines:

- a. Patients should have the ability to see currently available appointments and insert themselves into the schedule of the practice. Time slot is then reserved for patient.
 1. May be subject to final confirmation by practice

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • Demo appointment scheduling, ask how PU is notified of scheduled appt • Cannot be a request only - patients should have the ability to see currently available appointments and insert themselves in to the schedule of the practice. • Time slot is then reserved for patient 	

12.14

Practice routinely uses patient portal to prepare patient for planned visits, alerting patients to needed tests that can be done in advance, gathering information about questions and issues patients would like to discuss

Required for PCMH Designation: NO	Predicate Logic: n/a
PCMH Validation Notes for Site Visits	
<ul style="list-style-type: none"> • Provide examples of alerts or questionnaire 	