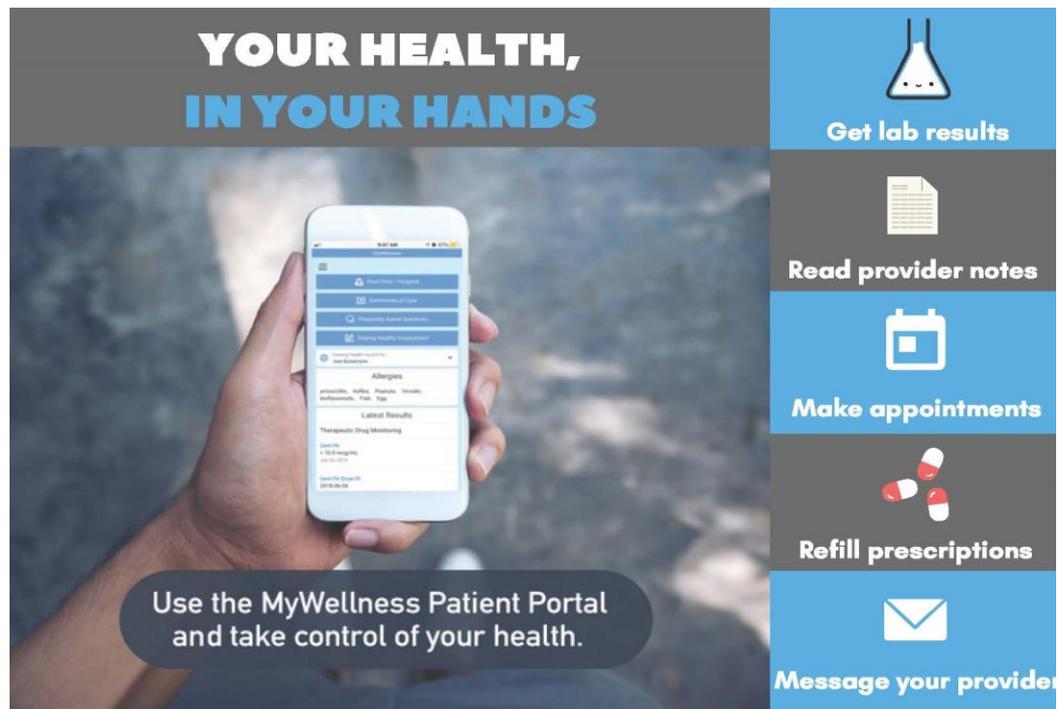


Curtis Tucker Public Health Center
Continuous Improvement Team
Quality Improvement Project

Improving Client Access to Laboratory Results Using ORCHID's MyWellness Patient Portal



**YOUR HEALTH,
IN YOUR HANDS**

Get lab results

Read provider notes

Make appointments

Refill prescriptions

Message your provider

Use the MyWellness Patient Portal and take control of your health.

February 7, 2019

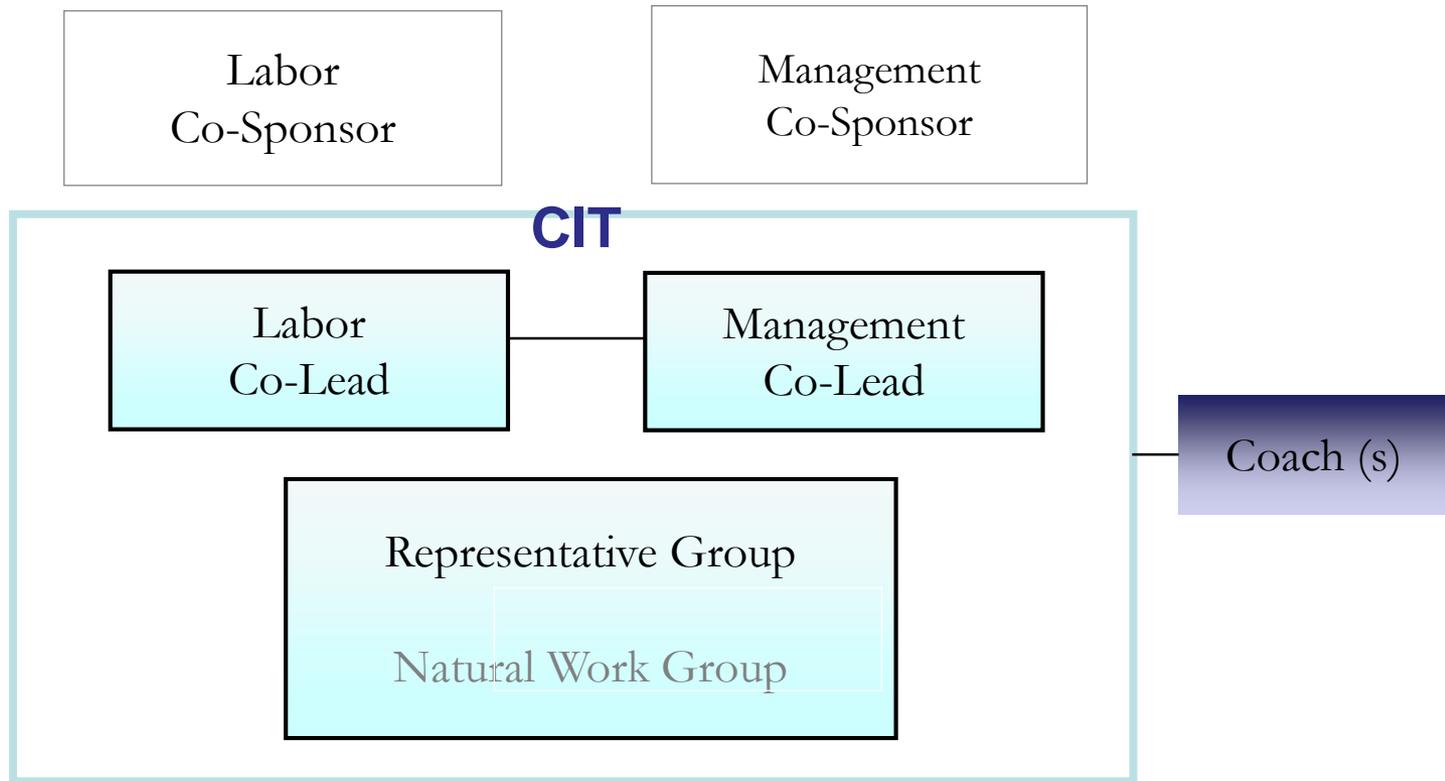


PLAN: Assemble the Team

The QI project team: Curtis Tucker Health Center's Continuous Improvement Team (CIT) members

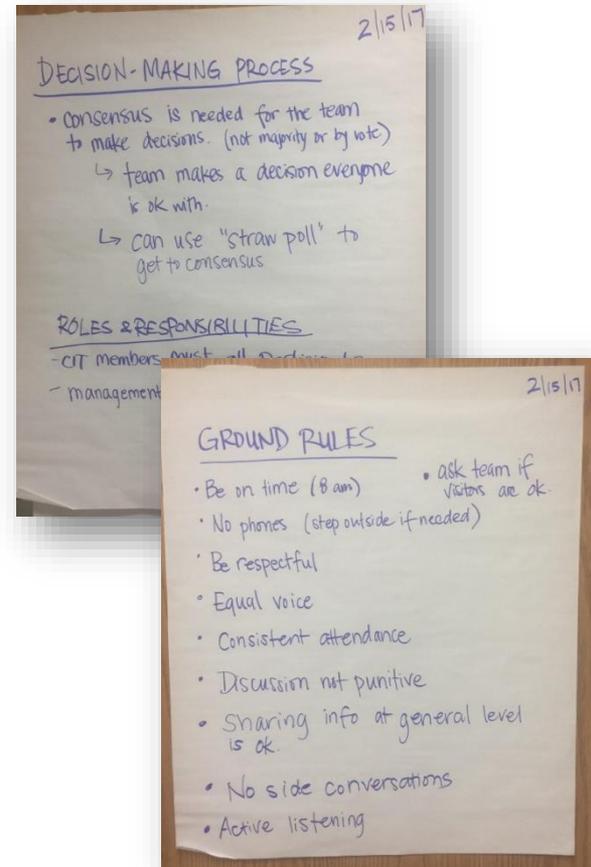


Continuous Improvement Team (CIT) Structure



How the CIT works together

- Everyone has a voice
- Decisions are made by “consensus”
- Focus on the system, not individuals
- Focus on issues within the team’s control (e.g., workflow, processes, etc.)
- **The team charter is an agreement of how the team will operate**



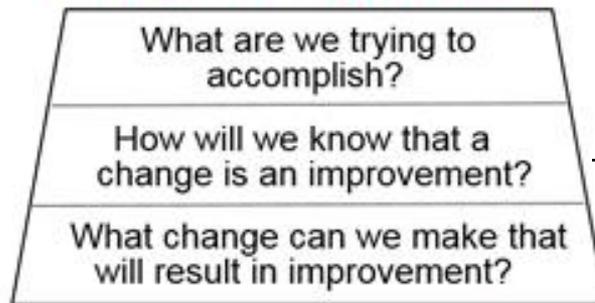
Curtis Tucker CIT Charter



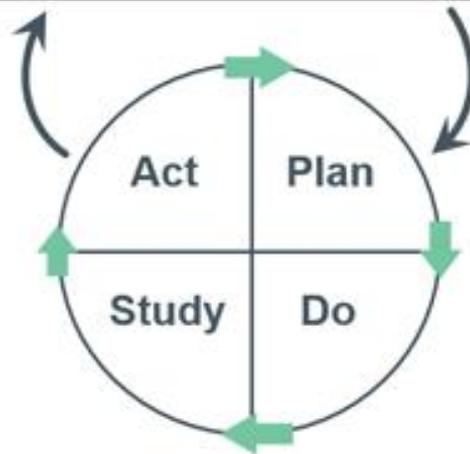
Continuous Improvement Team Process:

Institute for Healthcare Improvement (IHI) Model

Model for Improvement



→ 3 questions



→ Plan-Do-Study-Act Cycle

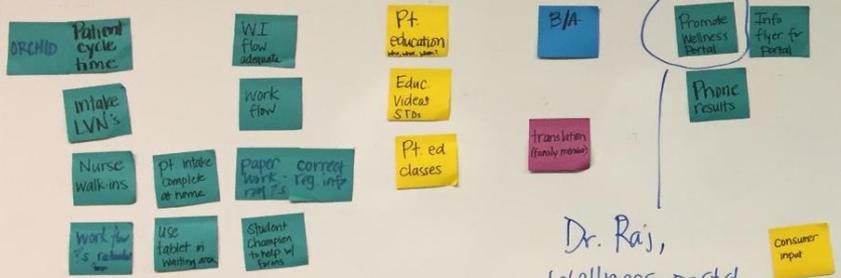


Brainstorm

CURTIS TUCKER PDSA CHART 1/24/18

PROBLEM STATEMENT:

Patients are anxious - need more information, have lots of questions



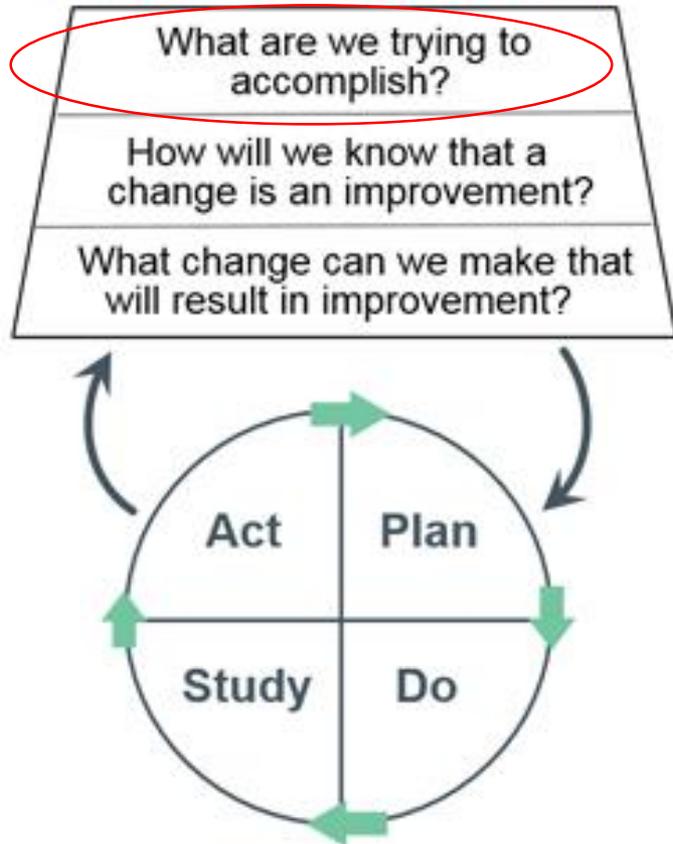
Dr. Raj,
Wellness portal
baseline

CI: 5/19/18
Brainstorm

- Cycle Time
- 2 intake LVNs (help w/ flow)
- Nurse walk-in - intake person (flow issue)
- Pt Education (what, when, what??)
Ed. videos in STD i.e. Herpes, HPV, gonorrhea, syphilis
- Soft tranquil Music - environment (for purpose of muffling external noise)
- B/A - 4-5 - per session (Look at prod report)
- Phone Results
- Promote Wellness Portal (English)
- WI flow adequate (Dr Raj gives pt how to access seems to be working)
- Sign off for family member to interpret & in clinic
- Refugee at process to max. care.
- Racial ID intake questions
- Specific Ethnic or racial grp.
- Flyer w/ steps on how to access w/ portal
- Pt re-direct from 114 to 117
- Communicate w/ pt. instructions how to navigate
- Better sign for Restroom Floor lines for direction.
- Pt Ed class - peer class or "promotoras" - pt survivor
- Use tablet in waiting area
- student champion to complete forms.



Model for Improvement



1. What were we trying to accomplish ?



Improve access to lab results for patients



PLAN: Identify the Problem

- The team identified timely access to lab results as an opportunity for improvement:
 - Lab results are given via phone or in person
 - Takes at least 1 week or longer
 - Requires dedicated staff on phones taking them away from other clinic duties



PLAN: Examine the Current Approach

- The team reviewed data logs to measure the current state

In December 2017 (before ORCHID):

- **Avg # of phone appointments:** 16 per day @ 3x's/week
- **Time spent on phone appointments:** Approx. 8 hours/week

PLAN: Identifying All Possible Causes

Delays in providing lab results via phone:

- Disconnected phones
- Incorrect phone numbers
- Dedicated staff & time



PLAN: Strategy Identified

- The team decided to use the electronic medical record (ORCHID)'s secure online patient portal known as: MyWellness Portal as an option for patients to access their lab results



Model for Improvement



2. How will we know that a change is an improvement?



Baseline data

February 12 – June 30, 2018:

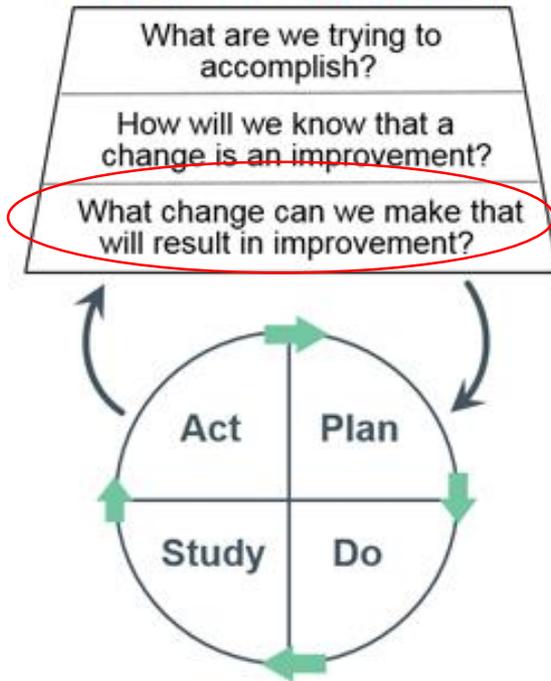
62.2% of Curtis Tucker patients successfully enrolled in MyWellness portal

SMART Goal:

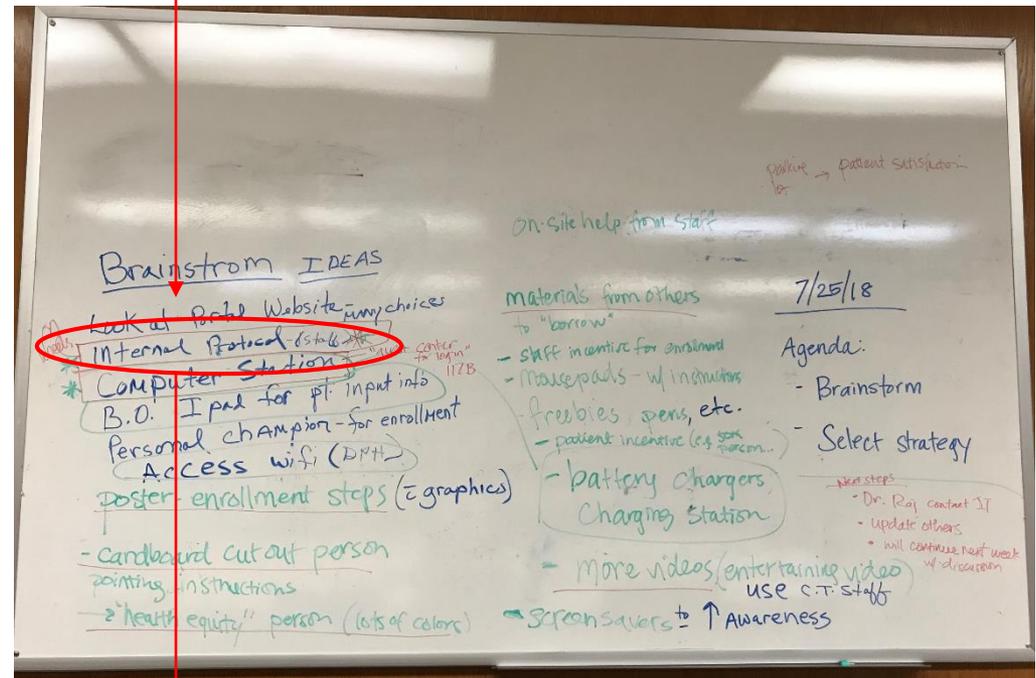
Increase enrollment to **70%** by August 31, 2018



Model for Improvement



3. What change can we make that will result in improvement?



Draft an internal protocol to promote MyWellness Portal in all units of the STD clinic work flow



Patient Portal Background

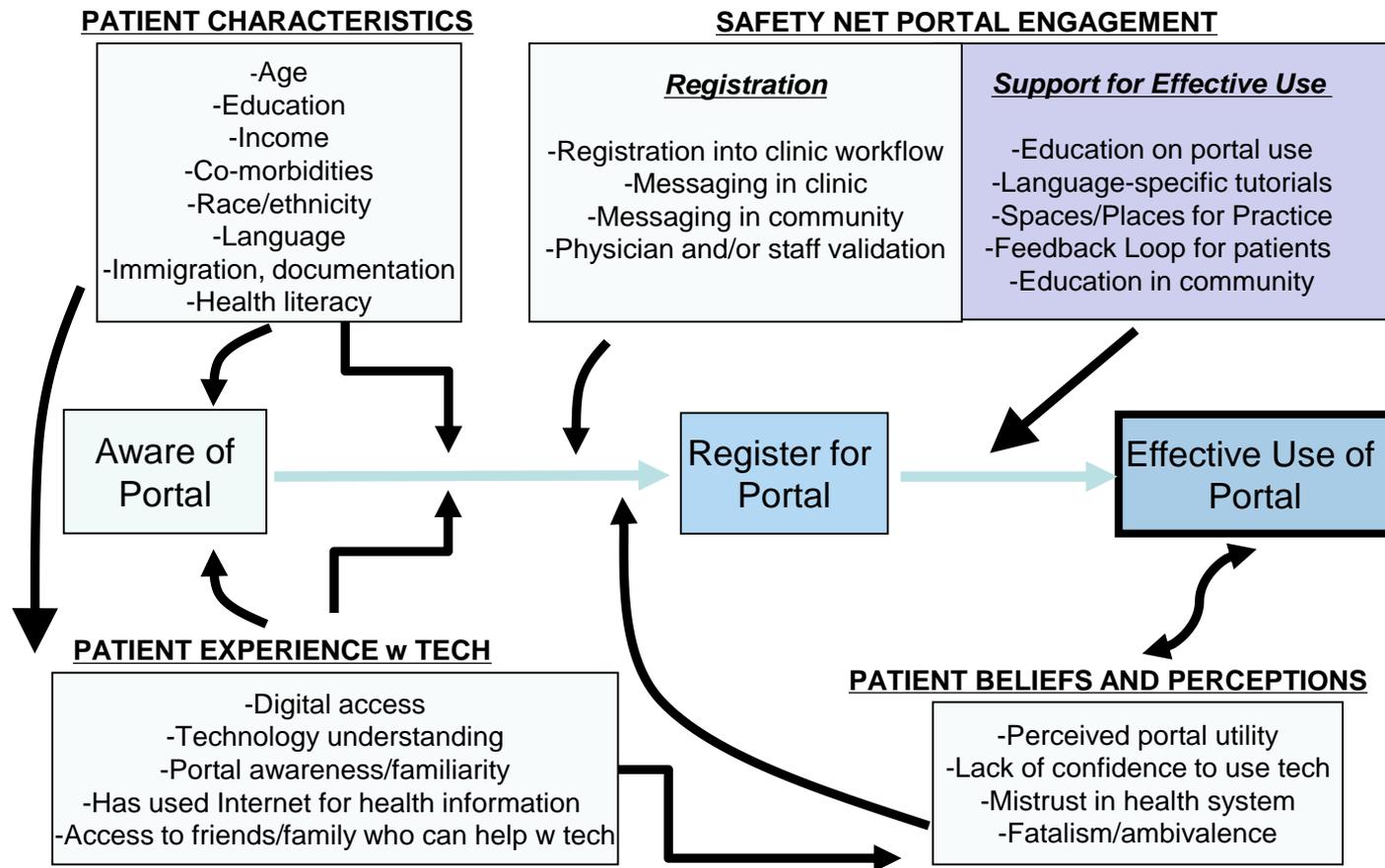
The Reality: Patient portals are a first step in connecting patients with their health information and teams



1. Health information
2. Self-service



Patient and Safety Net Factors that influence LAC Health Agency Portal Use



DO: Strategy Implemented

New Process Steps:



★ Patients were offered the option to enroll in the MyWellness Portal at all steps of the clinic visit



Screenshots: MyWellness Invitation Generation

Registration (From Ambulatory PreReg or Ambulatory Register Patient Screen)

Ambulatory PreReg

Last Name: ZZZZTEST First Name: TEST Middle Name: Preferred Name: Previous Last Name: Previous First Name: Suffix: Sex: Male Reason No Maiden Name: Unknown

Mother's Maiden Name: Reason For No SSN: Unknown Social Security Number: . . . Date of Birth: 02/14/1944 Age: 74Y DL/Other ID Number: Medical Record Number: 100376672 Financial Number: Census Tract Number:

Who Provided Info: Encounter Info Available?: No

Hispanic or Latino?:

Country of Birth: Jail Patient:

Mailing Address: Homeless: Returned Mail:

Mailing Address: 15555 Olive View Dr. Sylmar, CA 91342 Alternate Address: Add Address...

Phone and Email: Preferred Contact Method: Reason for No Phone Number: Home Phone: Work Phone: Cell Phone: Email Address 1: MyWellness Invitation: Challenge Questions: Challenge Answer:

Personal Data: Marital/Relationship Status: Family Size: Family Monthly Income: Preferred Language: Interpreter Required: Religion:

Employer Info: Employment Status:

Complete Cancel

Ready P0278 E536150 12/10/2018 15:39



Screenshots: MyWellness Invitation Generation

Nursing/PHI (From PowerChart)

This screenshot shows the PowerChart interface for patient ZZZZTEST, TEST. The 'Nursing' menu is open, and a red arrow points to the 'Nursing' option, which is labeled with a circled '1'. Another red arrow points to the 'Ambulatory Summary' tab, labeled with a circled '2'. The interface includes a menu on the left with options like 'Ambulatory Summary', 'Overview', 'Results Review', 'Diagnosis & Problems', 'Orders', 'Medications', 'Health Maintenance', 'Task List', 'Allergies', and 'Form Browser'. The main area shows 'Future Orders View', 'Patient Information', 'Allergies (0)', and 'Vital Signs'.



This screenshot shows the 'Nursing' form for patient ZZZZTEST, TEST. The form contains fields for patient information, including Last Name (ZZZZTEST), First Name (TEST), Middle Name, Date of Birth (02/14/1944), Gender (Male), Social Security Number, Medical Record Number (100376672), Financial Number (1010926287), and Home Phone ((310) 456-8899). A red arrow points to the 'MyWellness Invitation' tab, which is labeled with a circled '3'. The form also includes sections for 'Encounter Information', 'Patient Information', 'Emergency Information', and 'MyWellness Invitation'. The 'MyWellness Invitation' section includes fields for 'ACCESS EXPIRE DATE' (02/09/1962), 'Email Address 1' (zzzz@hotmail.com), 'Patient Portal Registration' (Yes, Generate Invitation), and 'Challenge Questions' (Last 4 digits of your phone number, What are the last 4 of your SSN, What year did you get married?, What year was your mother born?, Year you started elementary school). The form has 'Complete' and 'Cancel' buttons at the bottom right.



Screenshots: MyWellness Invitation Generation

Physicians (From PowerChart)

The screenshot shows the PowerChart interface for patient ZZZZTEST, TEST (DOB: 02/14/1944, Age: 74, Sex: Male). The 'PM Conversation' menu is open, and the 'Change Attending / MyWellness Invitation' option is selected. The 'Available Conversations' dialog box is open, and 'MyWellness Invitation' is selected. An arrow points to a detailed view of the 'MyWellness Invitation' form.

MyWellness Invitation Form Fields:

First Name:	Middle Name:	Last Name:	Medical Record Number:
TEST		ZZZZTEST	100376672
Community MRN:	Birth Date:	Sex:	ACSESXPIREDATE:
	02/14/1944	Male	02/09/1962
MyWellness Invitation:	Email Address 1:		
Yes, Generate Invitation	zzzz@hotmail.com		
Challenge Questions:	Challenge Answer:		
Last 4 digits of your phone number? What are the last 4 of your SSN? What year did you get married? What year was your mot... Year you started elementary school?			

Ready P0278 E445074 12/11/2018 15:39



Verification of MyWellness Portal Enrollment

Enrolled

Screenshot of the MyWellness portal for patient ZZZZTEST, JANA (DOB: 04/04/1969, Age: 49 years, Sex: Female). The "MyWellness" status is highlighted in a red box and labeled "MyWellness: Yes". A red arrow points to this status. The "Homeless" status is "N/A".

Not Enrolled

Screenshot of the MyWellness portal for patient ZZZZTEST, TEST (DOB: 02/14/1944, Age: 74 years, Sex: Male). The "MyWellness" status is highlighted in a red box and labeled "MyWellness: No". A red arrow points to this status. The "Homeless" status is "N/A".

Screenshot of the "New Message" form. The "To consumer" checkbox is checked and highlighted in a yellow box. A red arrow points to this checkbox. Other fields include Patient: ZZZZTEST, JANA, Caller: ZZZZTEST, JANA, and As: Phone Message/Call.

- From New Message
- Enrolled: "To consumer" enabled
 - Not Enrolled: "To consumer" not enabled



Patient Materials to Help Them Enroll

PORTAL ENROLLMENT STEPS:

- DID YOU GET YOUR MYWELLNESS INVITE ?**
 - Check your e-mail on phone
 - If no: check with staff
- OPEN THE INVITATION AND CLICK ON THE LINK TO ACCEPT**
- ANSWER THE QUESTIONS TO CREATE AN ACCOUNT**

YOU WILL GET A "CONGRATULATIONS" MESSAGE

(posters)

MyWellness ENROLLMENT STEPS:

- Did you get your MyWellness INVITE?**
 - Check your e-mail on phone
 - If you did not get the invite, ask a staff member for help
- Open the invitation & click on the link to accept**
- Answer the questions to create an account**

You will get a "CONGRATULATIONS" message

MyWellness
Patient Record Portal

Easy access to your health from home or on the go. With MyWellness you can:

- Contact your provider and team
- Make or see appointments
- Check lab results
- Prescription Refill/Renewal
- Health Record from visit

(postcards)



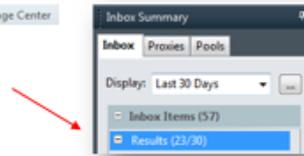
Tip sheet for clinic staff

LAC DPH – Curtis Tucker Public Health Center

How to Send a Patient Their Lab Results via MyWellness Portal

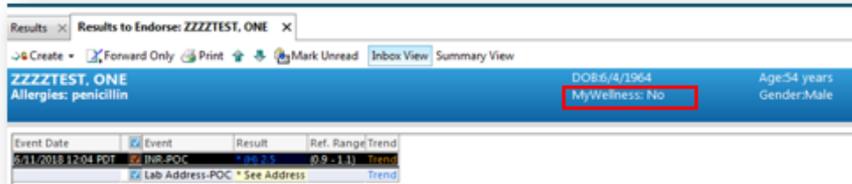
1. Navigate to **Message Center**

2. Click on **Results**



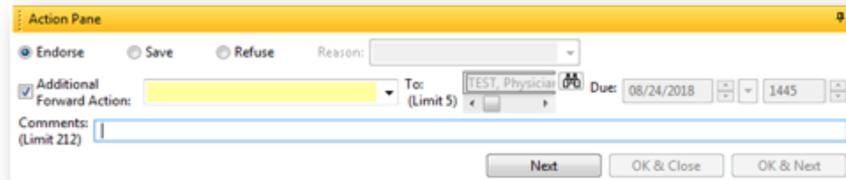
3. Double click on the result that you would like to send your patient. Review results.

4. Check to see if the patient is signed up for the MyWellness portal and can receive messages.  At the banner bar above the result, you will see **MyWellness: Yes or No**. **The patient must be enrolled to receive results.**



5. Navigate to the **Action Pane** (bottom of the page)

- Select **Additional Forward Actions**
- Select **Send To Consumer**.
- Enter a message to accompany the result(s) under **Comments**
- Select **OK & Close**



If your message is longer than 212 characters, you may also send a message by clicking the down arrow next to **Create**, select **Consumer Message** (this will be greyed out if patient is not on the portal)

Consumer Message

- Type in the subject and message (can create dot phrases for common messages about normal results, chronic disease advice, etc- will be discussed in a later section)
- Click **Send**



Patient View: Test patient demo

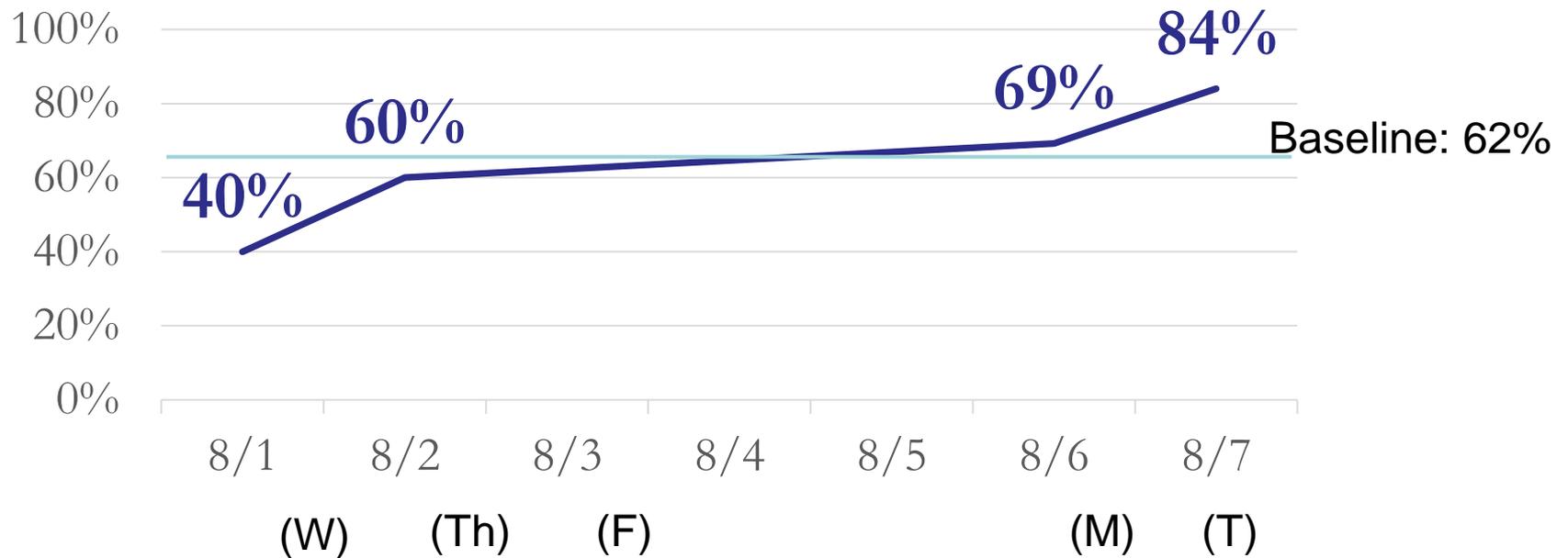
- <https://mywellness-ladhs.ighealth.com>
- **UserName:** TestJana
- **Password:** cerner2016
- **Patient:** ZZZZTEST, JANA
- **DOB:** 04/04/1969
- **MRN:** 10014460

Recent Results	Delivery Record	Care Management	Ambulatory	Lab - 7 Days	Lab - 18 Months	Microbiology	Diagnostics	Vital Signs	Assessments - Provider View	Assessments View															
Flowsheet: Patient Viewable Results Level: Patient Viewable Results Table Group List																									
May 18, 2016 10:07 PDT - January 18, 2019 09:07 PST (Clinical Range)																									
<table border="1"> <thead> <tr> <th>Navigator</th> <th>Patient Viewable Results</th> <th>11/06/2018 18:09 PST</th> </tr> </thead> <tbody> <tr> <td>Lab Results</td> <td>Lab Results</td> <td></td> </tr> <tr> <td></td> <td>C trachomatis Result-PHL</td> <td>NEGATIVE</td> </tr> <tr> <td></td> <td>N gonorrhoeae Result-PHL</td> <td>NEGATIVE, NEGATIVE</td> </tr> <tr> <td></td> <td>Trep Ab-PHL</td> <td>NEGATIVE</td> </tr> </tbody> </table>											Navigator	Patient Viewable Results	11/06/2018 18:09 PST	Lab Results	Lab Results			C trachomatis Result-PHL	NEGATIVE		N gonorrhoeae Result-PHL	NEGATIVE, NEGATIVE		Trep Ab-PHL	NEGATIVE
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	Trep Ab-PHL	NEGATIVE																							



STUDY: Check the Results

Week 1: Percent of new patients who successfully enrolled in MyWellness



STUDY: Check the Results

During the CIT pilot at Curtis Tucker HC, there were less phone appointments for results as more patients were receiving their lab results through the Portal

December 2017 (before ORCHID):

Average # of phone appts:
16 /day @ 3x's/week

Time needed for phone appointments:
Approx. 8 hours per week

Early August 2018:

Average # of phone appts:
2-3/day @ 3x's/week

Time needed for phone appointments:
Approx. 1.5 hours per week

*Both months had an average of 6-7 new patients per clinic



ACT: To Standardize or Not?

What action should be taken next?

- 1) ADOPT – Describe how the strategy will be standardized or plan for testing on a larger scale
- 2) ADAPT – Describe what variations of the strategy should be tested in the next PDSA cycle
- 3) ABANDON – Describe why the strategy is being abandoned and select a new strategy to test in the next PDSA cycle

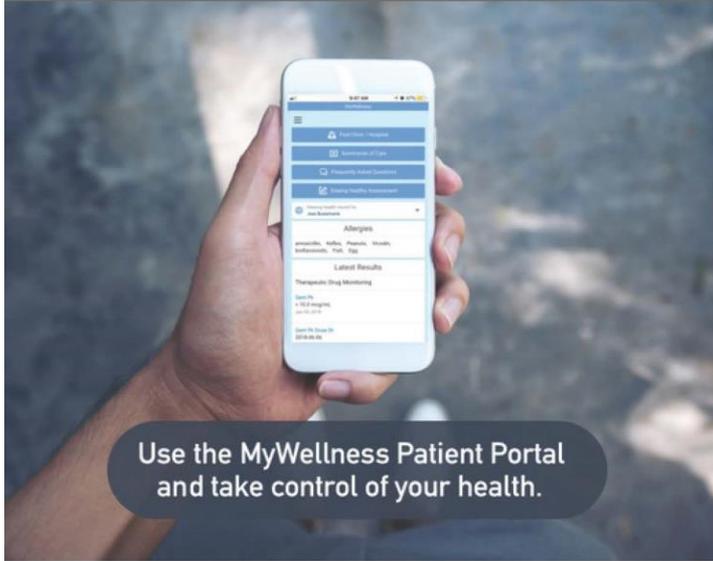


“Act” Phase

- All health centers *adopted* the strategy to offer patients the option to retrieve lab results through the MyWellness portal
- Prior to 12/18/18, all PH labs had to be sent to consumer by MD after review
- As of 12/18/18, all PH labs are auto-posted in the portal
(Except HIV Ab, hepatitis antigens, drug testing and processed tissue pathology, which by State law cannot auto-post and will have to be reviewed and sent to the consumer by the provider)
http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=HSC§ionNum=123148.
- Additional features of the portal:
 - Message Center: communication with clients
 - Preferred Pharmacy option



YOUR HEALTH, IN YOUR HANDS



Use the MyWellness Patient Portal and take control of your health.



Get lab results



Read provider notes



Make appointments



Refill prescriptions



Message your provider

New Rack Cards

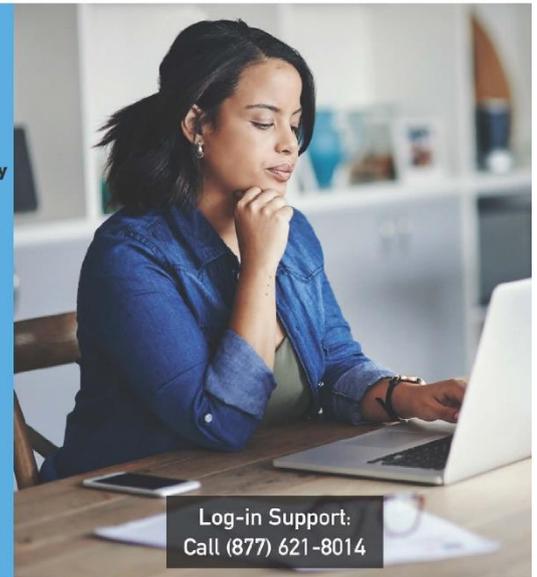
SAVE TIME, ENROLL TODAY

1) Accept the e-mail invitation sent to you by your medical team to create an account.

Or self-enroll at: bit.ly/mywellnesslacounty

2) Once you create an account, download the HealthLife app or log in on a web browser to access MyWellness Patient Portal.

HealthLife



Log-in Support:
Call (877) 621-8014

Note: Record your PIN in a safe place. You will need your PIN to activate your account.



Acknowledgements

Gema Morales-Meyer

Maxine Liggins

Anshu Abhat

Sara Simmons

Donna Sze

Rosie Martinez

Karen Swanson

ORCHID Sustainability Team

DPH Nurse Informatics

QI Team

