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Communication, Collaboration Are Key to Advancing Patient Portal Use

By Aine Cryts

To serve patients effectively, patient portals must be user-friendly, safe, and effective. And to the health information (HI) professionals charged with making that happen, Madonna LeBlanc, MA, RHIA, FAHIMA, has a piece of advice: Channel your own experience as a patient or care navigator for your family.

To illustrate, LeBlanc, an assistant professor of health informatics and information management at the College of St. Scholastica in Duluth, MN, shares her experience as a patient. She's on a six-month cycle for colonoscopies because of a history of polyps. Despite that, she was listed in her patient portal as being on a 10-year cycle for the procedure, along the lines of what the US Preventive Services Task Force recommends for adults ages 45 to 75. After discovering this incorrect information, she called her doctor's office to have her patient record corrected.

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While LeBlanc doubts she'll forget to schedule her colonoscopies at six-month intervals, the reminders she gets from her patient portal are helpful, she says.

'Better Access' to Health Data

Epic Systems and the Palo Alto Medical Foundation embarked on a patient-specific challenge in 1999: Develop functionality requirements for the first patient portal, which was called MyChart. Palo Alto Medical Foundation became the first MyChart customer in late 2000.

"The intent of [patient portals and similar systems] is clear – to give patients better access to their own healthcare data and enable them to be stewards of their own information," wrote John Halamka, MD, formerly of Boston's Beth Israel Deaconess Medical Center (now with Mayo Clinic Platform); Kenneth Mandel, MD, MPH, of Boston Children's Hospital; and Paul Tang, MD, of Palo Alto Medical Foundation in a 2008 article for the *Journal of AHIMA* about their early work with patient portals.

Halamka and Tang concluded that patient portals can help data sharing between patients and their healthcare providers. Still, they cautioned that attention must be paid to privacy, security, data stewardship, and personal control.

Approximately 78 percent of 50- to 80-year-olds in the United States use at least one patient portal, according to a University of Michigan National Poll on Healthy Aging released in May. The poll revealed a significant uptake in usage from five years ago when that figure was 51 percent.

In 2020, approximately 40 percent of patients across the country logged in to a patient portal, a 13 percent increase in usage since 2014, according to the Office of the National Coordinator for Health IT (ONC).

Health information about recent doctor visits, discharge summaries, allergies, medications, lab results, and immunizations are accessible to individuals who log in to their patient portal, which ONC boasts as "[giving] patients convenient 24-hour access…from anywhere with an internet connection." Some patient portals also allow patients to request prescription refills, make payments, and securely message their doctor or nurse, in addition to other functionality.

Patients need to take an active role in reviewing their patient record, and HI professionals should encourage them, says Colleen Goethals, MS, RHIA, FAHIMA, vice president of mid-revenue cycle at Xtend Healthcare.

Goethals' mother had a mastectomy after a cancer diagnosis. Many years later, a medical resident tried to confirm that her mother had had a left nephrectomy (or a removal of the left part of her kidney). After that encounter, Goethals advised her mother to have an amendment made to her patient record.

Education and Encouragement for Patients

According to the ONC, patients who are encouraged by their providers to access their portal are more likely to log in than those who don't receive such encouragement. Rose Costello-Reyes, MHA, CDIP,

RHIA, director of HIM and CDI services at Xtend Healthcare, points out that helping a patient access their patient portal is a smart time investment.

Costello-Reyes' pitch to patients is simple: "[Your patient portal] puts all of your information at your fingertips almost immediately."

But it's not enough for patients to know that they have a patient portal. Patients also have to review their record for accuracy, says LeBlanc, referring again to her own experience as a patient.

She was concerned about the incorrect schedule for a colonoscopy in her record–and in other patient records–for good reason: A missed screening may lead to a cancer diagnosis that could have been addressed earlier. Research backs this up: While breast cancer has a 99 percent five-year survival rate when discovered before it spreads, with colorectal cancer, the survival rate is 90 percent when the cancer is localized.

HI professionals' role is to help patients understand the depth and breadth of the information at their fingertips, notes LeBlanc, who has previously served in supervisory roles in health informatics in the hospital environment. "It's important to encourage patients to read their patient record as a way to engage in their own healthcare."

Leading the Charge on Policies and Procedures

HI professionals must lead the charge on setting policies and procedures for keeping patient records safe and accessible, says Goethals. "We're the ones who would set up what information goes to the portal, what information is available, and [what] information isn't available," she says.

Keeping patient records safe is also a concern. It's important to realize that if a state's laws related to patient privacy is more restrictive than the Health Insurance Portability and Accountability Act of 1996 (HIPAA), the state's laws will be applicable, she says. In Illinois, where Goethals lives, rules restrict the information that can be shared about drugs and alcohol, disability, and mental health for patients age 13 and older, she says.
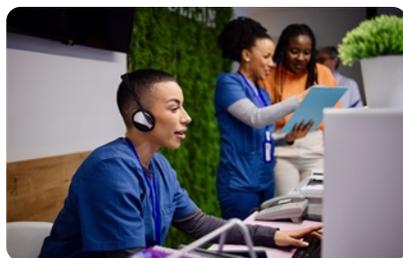
Kelly McLendon, RHIA, CHPS, senior vice president of compliance and regulatory affairs at CompliancePro Solutions, encourages HI professionals to work closely with colleagues in information technology and clinical informatics departments to ensure that their health informatics and patient privacy perspective and expertise helps drive patient portal projects.

"They're the [colleagues] you want to get close to, because if they respect HI they'll ask for HI's input," he notes. "Otherwise, they'll just forget and do whatever they think is best [from a patient privacy perspective] and it's always wrong."

McLendon laments that, often, HI professionals aren't brought to the table for major projects. His advice is to serve as subject matter experts, discover project scopes, and "insist that we have to [participate] because we're actually part of compliance and it's the law," he says.

Aine Cryts, *based in Kennebunk, ME, is a healthcare writer who is pursuing a masters in public health focused on social determinants of health and health informatics.*

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