



SOLUTIONS

Solutions in Behavioral Healthcare

Do You Need A Consumer Portal?

The other night I discovered I was out of a medication and had no refills left. Instead of waiting until the morning to call my doctor's office, I jumped on line, accessed my doctor's consumer portal (Note: "consumer" is used to represent client, patient) and sent a secure email with my request. Early the next morning, I received an email in my regular In Box saying my doctor had sent me a secure email and I should log into the portal and retrieve it. Upon logging in, I found the email that said the refill was complete, sent to the pharmacy and ready for me to pick up. The consumer portal my doctor's office uses makes my interactions with his office much easier. I can complete history forms, send emails, and do many other functions. Consumer Portal use is on the rise and getting a lot of attention. But does this apply to Behavioral Health? Will BH providers need to have consumer portals as well? Yes - in order to meet the Meaningful Use (MU) criteria, BH providers will need to have a consumer portal with specific functionality.

If Behavioral Health providers are included in the meaningful use provision (and even if they are not, they may still need to meet MU requirements), then a consumer portal will be one requirement. The [final rules state](#):

§ 170.304(d). Patient reminders. Enable a user to electronically generate a patient reminder list for preventive or follow-up care according to patient preferences based on, at a minimum, the data elements included in:

1. Problem list;
2. Medication list;
3. Medication allergy list;
4. Demographics; and
5. Laboratory test results.

In other words, make the above information and appointment reminders available to consumers electronically.

§ 170.304(g) Timely access. Enable a user to provide patients with online access to their clinical information, including, at a minimum, lab test results, problem list, medication list, and medication allergy list.

§ 170.304(h). Clinical summaries. Enable a user to provide clinical summaries to patients for each office visit that include, at a minimum, diagnostic test results, problem list, medication list, and medication allergy list.

§ 170.304(i)—Exchange Clinical Information and Patient Summary Record

(1) Electronically receive and display. Electronically receive and display a patient's summary record, from other providers and organizations including, at a minimum, diagnostic tests results, problem list, medication list, and medication allergy list...

(2) Electronically transmit. Enable a user to electronically transmit a patient summary record to other providers and organizations including, at a minimum, diagnostic test results, problem list, medication list, and medication allergy list...

In other words – share information with other providers that the consumer authorizes. A consumer portal will accomplish many, but not all of these requirements. The problem is, not many behavioral healthcare providers are using EHR systems, let alone an EHR system that has a consumer portal. Even statistics on how many BH providers are using systems are scarce. The last estimate done by the [National Council](#) in 2006 showed showed under 8% of providers were using EHR systems with clinical components. In order to meet meaningful use requirements, BH providers should begin to think about consumer portals. Here are the main functions you want to look for in a portal:

Secure Provider – Consumer communication: Most portals have a secure messaging system. The more advanced ones send a notice to a consumer's regular email account saying they have a secure email, and providing a link to the system. Being able to communicate with your provider or treatment team has the potential to greatly enhance treatment outcomes.

According to the Deloitte Development's [2010 US Survey of Health Care Consumers](#), "One in five consumers rates their interest in accessing their health records by a secure Internet connection as high, would switch physicians to obtain access and would be very likely to use a mobile communication device to maintain them. However, only 10 percent report having a computerized personal health record (PHR)." All indicators suggest that interest in consumer portals is growing and can be a great step forward in truly providing consumer driven care by making communication between the consumer and provider as easy as possible and more on the consumer's timetable.

Appointment Scheduling and reminders: Consumers should be able to request and/or change an appointment, and your office should be able to use the system to send out automatic appointment reminders. My dentist's office even has a "Confirm Your Appointment" link embedded in the email they send me.

Complete Forms: Consumers should be able to complete admission and other forms prior to getting to your office. This information should be able to flow right into your EHR to avoid duplicate data entry. Consumers should be able to update their demographic and insurance information as well. Another advantage of using this type of system is a reduction in the amount of paper your office needs to handle. HIPPA Privacy Notices, consents, and other forms could all be handled electronically. There is great potential for return on your investment with this functionality; less time can be spent in the face to face session on paperwork, and

more on the consumer's goals. Allowing consumers to complete certain paperwork on line before the initial visit may also yield better and more complete information.

Manage Medications: Consumers should be able to request refills, view current medications and track their usage.

Provider information to the consumer and/or other providers designated by the consumer: The ability to send vital information to another provider electronically, or give the consumer the information in an electronic format, is one of the major components of Meaningful Use. The system my doctor's office uses already has a version of a Continuity of Care Document (CCD). This allows me to print my medications, allergies, lab results and other important information that I choose to share with another provider.

Pay Bills: Some systems allow consumers to check their billing information, account balances and pay their bills from the portal.

Report on Test Results: Although this is a key feature in medical portals, having the ability to report test results in BH can also be very important (and a key requirement for MU). Most of the examples I found in BH were reports on tests associated with medication management order by prescribers (Lithium levels, WBC, etc). It will be interesting to see if there is a push for more reporting to consumers of outcome measurement tools.

Depending on the sophistication, some systems have functions that are similar to your web site: Consumer information, provider bios, FAQ's, and office locations.

Other features:

- Surveys – Consumer satisfaction surveys (and results!) and other surveys can get a wide and economic distribution via your consumer portal.
- Consumers can gain access to other tools your agency may offer. For example, [one system](#) gives access to their video-conferencing system so consumers and providers can video-chat.
- Consumer education, wellness and disease management. The consumer portal is an ideal way to educate consumers on a host of topics.

Potential for clinical innovation:

I think we are just beginning to explore the potential of this type of non-urgent communications via consumer portals. A [Kaiser Permanente study](#) involving consumers with diabetes showed better control over their illness by emailing with their primary provider. In Behavioral Health, Netsmart's system (ConsumerConnect) allows consumers to record information in an online journal prior to a scheduled session and review and comment on their treatment plans.

Another [system](#), built for use by the special needs community, allows parents to get updates from providers. Taking this one step further, a consumer portal system should allow parents and guardians to easily communicate information to providers. This could also be a powerful

feedback tool and allow consumers to rate their progress on goals as often as is clinically appropriate and helpful.

I think there is also huge potential in the areas of outcomes and assessment tools. Consumers could complete these tools before a session, track trends, add comments to discuss in the next session.

Steps to take:

1. Talk to your EHR vendor. What are their plans for a portal and how will it interact with your existing EHR?
2. If you are in the process of looking for a vendor, add consumer portal to your list of required functions.
3. Be sure to ask what functions you can control.
 - a) Are you able to allow view only and view and update of certain fields by the consumer (phone, address, insurance, etc)?
 - b) Can you add your logo and web theme so the site is consistent with your brand.
 - c) Can you send individual and group secure communications?
4. If your EHR vendor has no plans to add a consumer portal, there are third party vendors that can help (and interface with your existing EHR). One company I found was [Sophrona Solutions](#).

The use of consumer portals in BH is in its infancy. I would be interested to hear from you about other innovations you have encountered or would like to see developed.

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