A Bigger Bang Patient Portal Strategy: How we activated 100K patients in our First Year

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Lindsay Altimare, MPA
Director, LVPG Operations
Lehigh Valley Health Network

Michael Sheinberg, MD
Medical Director, Informatics
Lehigh Valley Health Network
Who We Are

- 8 hospital campuses
- 1 children’s hospital
- 160+ physician practices
- 17 community clinics
- 16 health centers
- 81 testing and imaging locations

- 12 express care locations
- 18,000+ employees
- 2,005 physicians
- 834 APC’s
- 1,838 acute care beds
Agenda

• Review of our EHR implementation and patient portal functionality

• Break down milestones achieved to accelerate patient portal activation

• Employ strategies to involve colleagues in cultural transformation

• Gain an understanding of new targeted, digital marketing strategies to enroll patients

• Demonstrate operational and outcomes analytics
Background
### EHR Implementation Timeline

<table>
<thead>
<tr>
<th>Year</th>
<th>Quarter 1</th>
<th>Quarter 2</th>
<th>Quarter 3</th>
<th>Quarter 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>Q3</td>
<td>Q4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td>2015</td>
<td>Q1</td>
<td>Q2</td>
<td>Q3</td>
<td>Q4</td>
</tr>
</tbody>
</table>

**Phase 1:** Project Planning & Certification

**Phase 2:** Validation

**Phase 3:** Re-engineering & System Build Out

**Phase 4:** Testing & Training

**Phase 5/6:** Optimization

- **Ambulatory Go-Live**
- **Inpatient Go-Live**

**Kickoff**

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My LVHN Portal

You Might Want To...

- Schedule appointments for your current health reminders. 2 reminders need your attention.

- Read your letters. You have 1 new letter.

View your test results
Send a message to your provider
Refill your medications
Review your health summary
View your account summary
Request an appointment
MyLVHN Portal

Growth Charts (Christine)

CDC GIRLS (2-20 YEARS) - Length-for-age

Growth Chart: United States

Diabetes

Goals - Medications - Test Results - Health Reminders

Test Results

These are your diabetes related test result components. You may view a list of all your test results for more information.
Provider/Network Perspective

- Reducing Costs with Online Test Results
- Reducing Phone Calls
- Reducing Time Spent Charting with Online Questionnaires
- Reducing No-Shows and Saving Money with Online Scheduling
- Increasing Patient Loyalty
- Reducing Costs with Online Bill Pay
- Increasing Revenue and Saving Time with E-visits
MyLVHN Portal: Challenges

• New functionality

• Change management

• Requires patient activation

• Need high percentage rates for ROI
Portal Governance

MyChart Advisory Group
  (Marketing Chair)

Steering Committee

Epic

Legal/Risk
  Epic Ambulatory Manager
  MyChart Analyst
  Epic Medical Lead
  Cadence Manager
  Organizational Development
  Data Analytics
  HIM
Patient Portal Strategies
MyLVHN Portal Journey: Roadmap to Success

**Wave 1:**
- Ambulatory Go-Live
  - Feb 2015
- All LVPG Practices Promotion
  - Apr 2015
- LVPG Pilot Practices Promotion
  - Jun 2015

**Wave 2:**
- Inpatient Go-Live
  - Jul 2015
- All Patient Promotion
  - Aug 2015
- Text Message Reminders
  - Sep 2015
- Televox Autocalls To Patients
  - Oct 2015
- Direct Scheduling Enabled
  - Nov 2015
- Mass Media Campaign
  - Dec 2015
- Patient Entered Questionnaires Pilot
  - Jan 2016
- Consumer Relationship Management System Email Campaign
  - Mar 2016
- E-visit and Virtual Visit Pilots Launch
  - Apr 2016
- App Optimized
  - Jun 2016

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Pilot Practices

• Pilots induce learning from controlled environments

• Goal was to define roles, workflows, patient engagement, impact on practice work load (increase vs. economies)

• 14 practices selected-cross section of disciplines
Pilot Practices

• “On paper” processes tested and refined
• Best practices brought out through daily communication
• Practice Feedback/presentations yielded replicable methodology and success
FY16 Goal Setting

• LVHN sets annual Triple Aim Network-Wide Goals

• One of two goals under “Better Health” set as Patient Engagement was MyLVHN patient activations

• A network goal along with its inclusion under our Shared Success Plan ensured the engagement of all colleagues
FY16 Goal Setting

• Given experience of other systems, modest goals were set with a threshold of 25,000 and max of 40,000 patients.

• Early in Q2 the goals were revised at the request of the Board of Directors given our trajectory-max set at 55,000.

• As we blew past this goal we were in unchartered territory.

• Percentage versus “n”

<table>
<thead>
<tr>
<th>LVHN FY 16 NETWORK GOALS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Increase patient portal engagement</strong></td>
</tr>
<tr>
<td>as measured by total number of patients activated</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Threshold</th>
<th>Target</th>
<th>Maximum</th>
</tr>
</thead>
<tbody>
<tr>
<td>25,000</td>
<td>32,500</td>
<td>40,000</td>
</tr>
</tbody>
</table>
Colleague Engagement

- FY16 Goal tracking
- Video for how to enroll
- Email blasts
- LVHN Daily articles
- Leader-to-Leader presentation
- Department meetings
- Scripting
Mass Media Campaign

• Launched December 2015
• Patient Flyers
• Billboard
• TV, Radio
• Print
• Social Media
Nurture Email Campaign

• 80,000 patients identified
  – February 2015 to January 2016
  – Patients had code, but not enrolled
  – Email address on file

• MyLVHN Active
  – Resent code with reminder

• MyLVHN Expired
  – Provided new code and encouraged activation
Patient Engagement Strategy – Year 1

Optimization Project Timeline 2015-2016: MyLVHN Initiatives

**Wave 1 – Optimization**

*Comprehensive strategy to drive MyLVHN signup and utilization.*

**Completed Items:**
- View labs, graphs
- View/download/transmit AVS
- Text message appt reminders
- Request refills
- Proxy access/view
- Care everywhere auth

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**Patient Entered Questionnaires**
- ROS, HPI, Subset Specialty Questionnaires

**Pilot Go Live**

**LVPG Go Live**

**E-Visit**

**MyLVHN eCheck-In**

**Video Visit**

**MyLVHN Bedside**

**Mobile App Enhancements**

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**Appointment Cancellation**
- Patient Self Scheduling Well Visits-
  Primary Care

**Pilot Go Live**

**Patient Self Scheduling Well Visits- Pediatrics**

**Pilot Go Live**

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Patient Engagement Strategy – Year 2

### Optimization Project Timeline 2015-2016: MyLVHN Initiatives

<table>
<thead>
<tr>
<th>July</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan 2017</th>
<th>Feb</th>
<th>Mar</th>
<th>April</th>
<th>May</th>
<th>June</th>
<th>July</th>
<th>Aug</th>
<th>Sept</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Video Visit Go-Live</strong></td>
<td><strong>Open Scheduling</strong></td>
<td><strong>Pilot Go Live</strong></td>
<td><strong>Open Scheduling Expansion</strong></td>
<td><strong>Direct Scheduling (Sick Visit) Expansion</strong></td>
<td><strong>Pilot Go Live</strong></td>
<td><strong>Waitlist Appointment Offers (Fast Pass)</strong></td>
<td><strong>Go Live</strong></td>
<td><strong>eCheck-In Welcome Tablets</strong></td>
<td><strong>E-Visit Expansion</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **July**: Video Visit Go-Live
- **August**: Open Scheduling
- **September**: Pilot Go Live
- **October**: Open Scheduling Expansion
- **November**: Direct Scheduling (Sick Visit) Expansion
- **December**: Pilot Go Live
- **January 2017**: Waitlist Appointment Offers (Fast Pass)
- **February**: Go Live
- **March**: eCheck-In Welcome Tablets
- **April**: E-Visit Expansion

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Outcomes and Operational Analytics
Portal Activation
MyLVHN Activations - Monthly

- LVPG Pilot Practices Promotion
- FY16 Goal Setting
- Mass Media Campaign
- Consumer Relationship Management Email Campaign
Portal Activation

Enterprise Activation Rate

Epic Top 5%
Epic Average
Lehigh Valley Health Network

Aug  Sep  Oct  Nov  Dec  Jan  Feb  Mar  Apr  May  Jun  Jul
FY16 Key Patient Engagement Metrics

<table>
<thead>
<tr>
<th>Service</th>
<th># of Hits</th>
<th>Unique Patients</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Medical Advice Request</td>
<td>84,952</td>
<td>25,313</td>
</tr>
<tr>
<td>eCheck-In</td>
<td>65,529</td>
<td>11,236</td>
</tr>
<tr>
<td>Appointment request (non-direct)</td>
<td>38,251</td>
<td>20,793</td>
</tr>
<tr>
<td>Patient Medication Renewal Request</td>
<td>26,109</td>
<td>11,115</td>
</tr>
<tr>
<td>History Questionnaire Submission</td>
<td>20,306</td>
<td>18,377</td>
</tr>
<tr>
<td>Patient Appointment Direct Cancel</td>
<td>17,938</td>
<td>9,407</td>
</tr>
<tr>
<td>General Questionnaire Submission</td>
<td>15,928</td>
<td>11,050</td>
</tr>
<tr>
<td>Patient Appointment Schedule Request</td>
<td>12,071</td>
<td>7,961</td>
</tr>
<tr>
<td>Copay payment</td>
<td>3,632</td>
<td>2,221</td>
</tr>
<tr>
<td>Appointments Scheduled through MyLVHN</td>
<td>2,359</td>
<td>n/a</td>
</tr>
<tr>
<td>E-visit</td>
<td>56</td>
<td>43</td>
</tr>
</tbody>
</table>
FY16 Key Patient Engagement Metrics

### MyLVHN Appointments by Schedule Method

Data by Enterprise Analytics

<table>
<thead>
<tr>
<th>Schedule Method</th>
<th>Total Appointments Scheduled Online</th>
<th>Amount Saved through MyLVHN</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3,132</td>
<td>$0</td>
</tr>
</tbody>
</table>

For appointments scheduled between 09/01/2015 and 08/31/2016.

### Top Visit Types by Appointments Scheduled Through MyLVHN

Among All Patients, and Non-Canceled Appointments

<table>
<thead>
<tr>
<th>Visit Type</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preventive</td>
<td>2,279</td>
</tr>
<tr>
<td>Well Visit</td>
<td>285</td>
</tr>
<tr>
<td>Preventive GYN</td>
<td>236</td>
</tr>
<tr>
<td>Return Patient Visit</td>
<td>110</td>
</tr>
<tr>
<td>AnnualMedicare Wellness Visit</td>
<td>79</td>
</tr>
<tr>
<td>GYN Visit</td>
<td>57</td>
</tr>
<tr>
<td>Ill</td>
<td>19</td>
</tr>
<tr>
<td>Physical</td>
<td>18</td>
</tr>
<tr>
<td>New Patient</td>
<td>13</td>
</tr>
<tr>
<td>New Patient/Preventive</td>
<td>9</td>
</tr>
</tbody>
</table>
## FY16 Key Patient Engagement Metrics

### MyLVHN Activation - Unique Patients with Encounters

For all encounters occurring between 09/01/2015 and 08/31/2016. Grouped by Department. Filtering on Encounter Type, Service Area.

Patient percentages by MyLVHN status. Report shows the number and percentage of unique patients that had encounters in our network and are currently active on MyLVHN.

<table>
<thead>
<tr>
<th>Department</th>
<th>Unique Patients</th>
<th>% of Total</th>
<th>Currently MyLVHN Active</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grand Total</strong></td>
<td>414,201</td>
<td>100%</td>
<td>113,076</td>
</tr>
<tr>
<td>CC 1230 LVH DIAG IMAG [10016003]</td>
<td>19,460</td>
<td>5%</td>
<td>7,927 41%</td>
</tr>
<tr>
<td>M 1770 LVH-M IMAG MRI [10029013]</td>
<td>4,831</td>
<td>1%</td>
<td>2,058 43%</td>
</tr>
<tr>
<td>17 ADULT SLEEP CTR [10002020]</td>
<td>2,207</td>
<td>1%</td>
<td>1,143 52%</td>
</tr>
<tr>
<td>17 AIDS ACTIVITIES OFC [10002026]</td>
<td>1,244</td>
<td>0%</td>
<td>362 29%</td>
</tr>
<tr>
<td>17 ASU [10002012]</td>
<td>6</td>
<td>0%</td>
<td>3 50%</td>
</tr>
<tr>
<td>17 AUDIOLOGY [10002001]</td>
<td>8</td>
<td>0%</td>
<td>2 26%</td>
</tr>
<tr>
<td>17 BHS [10002007]</td>
<td>8,903</td>
<td>2%</td>
<td>2,532 28%</td>
</tr>
<tr>
<td>17 CC ADHD CLINIC [10002045]</td>
<td>128</td>
<td>0%</td>
<td>30 23%</td>
</tr>
<tr>
<td>17 CC ASTHMA [10002046]</td>
<td>236</td>
<td>0%</td>
<td>35 16%</td>
</tr>
<tr>
<td>17 CC AT LVH [10002037]</td>
<td>17,326</td>
<td>4%</td>
<td>1,559 9%</td>
</tr>
<tr>
<td>17 CC CAC [10002050]</td>
<td>402</td>
<td>0%</td>
<td>25 6%</td>
</tr>
<tr>
<td>17 CC CCT [10002056]</td>
<td>304</td>
<td>0%</td>
<td>36 12%</td>
</tr>
<tr>
<td>17 CC COMPLEX CARE [10002048]</td>
<td>148</td>
<td>0%</td>
<td>16 11%</td>
</tr>
<tr>
<td>17 CC OBESITY [10002047]</td>
<td>325</td>
<td>0%</td>
<td>45 14%</td>
</tr>
</tbody>
</table>

Currently MyLVHN Active: 113,076 of 414,201 (27.3%)

Data by Enterprise Analytics

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FY16 Key Patient Engagement Metrics

Percentage Patients First-Time Activated: Month-to-Month Trend
Among Patients for which a Code was Generated that Month

Nurture Reactivation
FY16 Key Patient Engagement Metrics

MyLVHN Messaging - Message Usage Stats

For messages received from patients between 3/1/2016 and 6/30/2016

Messages Received by Message Type

- Patient Medical Advice Request
- Patient Medication Renewal Request
- History Questionnaire Submission
- General Questionnaire Submission
- Patient Appointment Cancel Request
- Patient Appointment Schedule Request
- Patient Customer Service Request
- User Message
- Questionnaire Submission CC
- E-Visit

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FY16 Key Patient Engagement Metrics

Top 10 Methods of Activation Code Generation

- SmartText
- Billing Correspondence
- Proxy Access Activity (Enable for Proxy)
- E-mailed Activation Code (Success)
- MyLVHN Administration Activity
- Launch MyLVHN Signup
- Self-Signup (Success)
- Proxy Access Activity (Non-Patient Activation Code (Failure))
- Kiosk
- All Others
Lessons Learned
Lessons Learned

• Patients were interested in having their health information at their finger tips
  – Patients found the portal prior to active promotion
  – Cultural change needed to support new model of patient engagement
  – Include MyLVHN workflows with Go-Live

• Engaging patients with activation codes, but not activated

• Critical Success Factors (included in recipe)
  – FAQs, Tip Sheets, Workflows
Lessons Learned

• Challenges/Potential Risks
  – Proxy Access
  – Contest – attributing activations within practices

• Patient Enrollment Barriers
  – Changed from needing MRN to using SSN
  – Code expiration

• Prioritizing Optimization and responding to patient demand
Conclusions
Patient Portal Recipe for Success

<table>
<thead>
<tr>
<th>Prep Time</th>
<th>Cook Time</th>
<th>Serves</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Diligence Planning</td>
<td>Pilot before Launch</td>
<td>Your organization to achieve patient portal success</td>
</tr>
</tbody>
</table>
Patient Portal Recipe for Success

MyChart Recipe for Success
from Lehigh Valley Health Network

prep time
due diligence
planning

cook time
pilot before
launch

serves
your organization to
achieve MyChart success

ingredients

Robust Educational Materials
dash of best practice pilot tips
sprinkle of staff FAQs
1 teaspoon of workflow
1 cup of sample scripting

Marketing Tactics
heaping of MyLVHN brochures/flyers
6 tsp patient facing FAQs

Pilot Launch
Pint of pilot launch presentation
1 weekly MyLVHN pilot call

Colleague Engagement/Goal
Integration
5 cups internal website articles
Questions & Answer

Contact Information:

**Lindsay Altimare, MPA**
Director, LVPG Operations
Lehigh Valley Health Network
Lindsay.Altimare@lvhn.org

**Michael Sheinberg, MD**
Medical Director, LVHN Informatics
Lehigh Valley Health Network
Michael.Sheinberg@lvhn.org