

Patient Portal Training Evaluation Report

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Implementation Overview

The nurse and I met at the classroom a few minutes early to prepare the laptop for the presentation and computers for the learners. Learner guides were handed out as participants arrived so they could be seated quickly. The participants included six individuals and one married couple all within or slightly above the target demographic age. The introduction went quickly and according to the presentation. Then, the learners were asked to launch their web browsers to navigate to the patient portal only to reveal an inconvenient surprise.

The patient portal website, created by a third party vendor, had undergone a significant design upgrade. Most of the fields and functionality on the individual pages remained quite similar which matches the information in the learner guide. The class was able to continue but the visual difference between many of the slides and what the learners experienced added some difficulty. To compensate for this unforeseen discrepancy, learners stayed focused on their own screens and relied more on spoken prompts.

When instructing, it was difficult to verify that everyone was working on the same section while also managing the rapid switching of slides in the presentation. It did not seem to interfere with the activities or the timing, but the high number of slides felt cumbersome. The visual differences between the screenshots and the patient portal resulting from the upgrade slightly contributed to this issue. It is hard to speculate whether proposed class size of up to 20 participants would add further complication, but decreasing the number of slides is feasible and will ease delivery.

The learning objectives focus on the content and purpose of several portions of the site. Participants using their personal information such as account details and familiar concepts like appointments, medical records, and health details create a comfortable link to this new platform

for managing this information. Basic computer and internet skills required to participate brought learners who were confident navigating the portal but were unfamiliar with the extent of the information available. “For learners new to a content area, integrating component knowledge and skills into whole tasks results in higher motivation and a better ability to apply the newly acquired skill in new situations” (Merrill, p. 6, 2007). The evaluation shows the learners were confident with their ability to navigate the portal and the information it offers them. The initial class was successful but some improvements can be made to make facilitating easier and the content more useful to patients.

Assessment and evaluation data

This evaluation relies on a program oriented approach. To measure aspects of successful delivery, the “program-oriented approach encourages us to use characteristics of the program as our guide to the evaluation” (Fitzpatrick, Sanders, & Worthen, 2010, p. 321). For a short, new course, the assessments serve as a formative evaluation, revealing areas of the course that need modified, and a summative evaluation showing its effectiveness. The survey combined with facilitator feedback gives immediate insight on learner expectations. Ultimately, a follow up survey and patient portal usage statistics will be reported to determine long-term outcome and continued delivery of this program.

Statistics from the practice’s patient management system show that approximately half of the current patients range in age from 40 to 69. Participants in the initial patient portal training class included six individuals and one married couple ranging from 51 to 72 all with adequate computer and the internet skills. This raises a consideration for signing up couples with both

individuals participating or one who will participate while the other observes. Including couples does not change design or content, but may affect seating and room capacity.

The interactive quiz (Appendix A) was formulated to validate the transference of learning objectives while reinforcing them to the learner. The learning management system calculates quiz scores automatically and tabulates the survey data. Musial, Thomas, & Nieminen (2008) explain that this initial assessment helps reveal misconceptions and gauge the outcome. Two of the seven participants failed to select all the purposes of the personal health record in question four. This shows that this concept might need clarified to emphasize specific topics rather than the motivation of that part of the portal. Also, nearly half the learners missed the question that appointment inquiries are requests which was worded vaguely in the assessment and will be corrected.

The learning objective of patient communication is a prominent feature of the portal and applies to several departments of the practice. During instruction on patient-initiated communication, a few examples were improvised based on the nurse's experience and scope of practice. A specific, clear list of examples for appropriate and inappropriate questions prepared for the presentation will better convey proper usage of this function. If the instruction is expanded to include the other patient communication sections, they should include equally detailed examples. Assembling these samples will require additional subject matter experts from the corresponding departments.

On the learner survey (Appendix B), 43% of the respondents asked for additional information regarding renewal of prescriptions. A third of the respondents wanted information about paying their medical bill using the portal as well. It is possible to add this information without increasing class time by spending less time defining the account setup process in such

detail. The account setup process goes quickly and optional steps can be skipped and briefly covered when discussing the process of updating account information.

The underlying goal of the class is to meet the need defined in the meaningful use criteria for electronic health records by the Center for Medicare and Medicaid Services which is to increase the number of patients using the portal. Participants responded unanimously that they felt confident navigating the portal and 85% were more inclined to use it after training. Therefore, this course is a successful method for expanding patient usage of the portal. Next we want to measure the outcome of patients using it effectively. A confirmative evaluation will be necessary to follow up the outcome of its continued and proper use over time.

Proposed revisions

Learners asked about two specific portions of the portal that were not covered yet were visible when navigating the pages. These are the medical bill payment online and the prescription renewal request. These topics were originally omitted in the interest of time. Alterations can be made to allow for time to include these additional topics. The first learner activity, account creation and maintenance, duplicates multiple fields of information on repetitive screens. The process of creating user accounts cannot be avoided, however, account management and correction can be quickly demonstrated and is documented in the learner guide.

During development, the presentation broke individual sections down to a very granular level. Adult learners with computer and internet skills do not require this level of detail. Once they had a grasp of how to navigate to the various sections and the information they would find there, they did not need stepwise supervision. This will decrease the number of slides that the facilitator must manage and allow clearer examples as reference for patient initiated tasks. This

will also eliminate the need to replace as many screenshots when updating the presentation to reflect the upgrades performed on the portal website by the vendor.

A suggestion by the facilitator is that the information in the course should be shared with any staff that deal directly with patients. Currently, office and clinical staff are aware of, but not familiar with the details of, the patient portal. Nurses are ideal to facilitate classes with patients, however, department managers can learn this information and share it with their staff. With improved knowledge of the patient benefits of the portal, staff can answer patients' questions, share information, and encourage them to sign up for the class.

References

Fitzpatrick, J., Sanders, J., & Worthen, B. (2010). *Program evaluation: Alternative approaches and practical guidelines* (4th ed.). Boston, MA: Pearson.




Merrill, J. (2007). A Task-Centered Instructional Strategy. *Journal of Research on Technology in Education*, 40(1), 5–22.

Musial, D., Thomas, J., & Nieminen, G. (2008). *Foundations of meaningful educational assessment*. New York: McGraw-Hill.

Appendix A


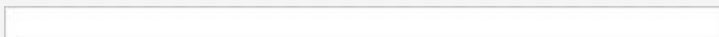

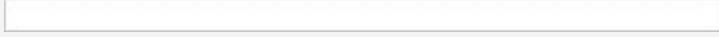
Pass / Fail: 2 / 5
 Scores: 100 % (high), 67% (low), 82% (average)

1. Logging in to the patient portal starts with these 4 steps: (Place the following steps in order.)
 (Sequence - 10 Points)

Answer		Percent	Total
Navigate to the website (http://havi-north.com) Click the Patient Portal button, Enter UserID and password, Go to the My Patient Page		71	5
Navigate to the website (http://havi-north.com) Click the Patient Portal button, Go to the My Patient Page, Enter UserID and password		14	1
Navigate to the website (http://havi-north.com) Go to the My Patient Page, Click the Patient Portal button, Enter UserID and password,		14	1


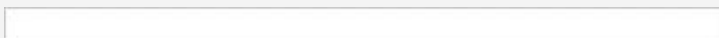
Total Responses: 7

2. I need to update my portal account and insurance information (Multiple Choice - 10 Points)

Answer		Percent	Total
✓ every time there is a change		100%	7
once a week		0%	0
once a month		0%	0
when my doctors asks me to		0%	0



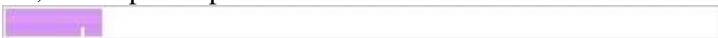
Total Responses: 7

3. The only information I can store in the personal health record is medication and allergy information (True / False - 10 Points)

Answer		Percent	Total
✓ False		100%	7
True		0%	0

Total Responses: 7

4. The personal health record helps me (Select all that apply) (Multiple Response - 10 Points)

Answer		Percent	Total
inform my healthcare providers of my needs		14%	1
✓ plan lifestyle changes , inform my healthcare providers of my needs		71%	5
plan lifestyle changes , inform my healthcare providers of my needs, renew prescriptions		14%	1





Total Responses: 7

5. The patient portal allows anyone to see my medical record (True / False - 10 Points)

Answer		Percent	Total
✓ False		86%	6
True		14%	1

Total Responses: 7

6. When can I schedule my own appointments using the portal (Multiple Choice - 10 Points)

Answer		Percent	Total
any day in the future		29%	2
✓ never		57%	4
when it is convenient for my doctor		14%	1
any time of day		0%	0


Total Responses: 7

7. If I would like one of The Heart & Vascular Institute physicians to provide a second opinion, or clearer explanation of a study to (Multiple Choice - 10 Points)

Answer		Percent	Total
✓ Transfer records to HAVI		100%	7
Transfer records from HAVI		0%	0




Total Responses: 7

8. If I have severe chest pains I should use the portal to email my physician's nurse. (True / False - 10 Points)

Answer		Percent	Total
✓ False		100%	7
True		0%	0

Total Responses: 7

9. Asking a nurse through the portal is a good way to (select all that apply) (Multiple Response - 10 Points)

Answer		Percent	Total
Ask about preparation for an upcoming procedure procedure, ask about side effects for a drug		29%	2
✓ Ask about preparation for an upcoming procedure procedure, ask about side effects for a drug, ask about lowering blood pressure		57%	4
Ask about preparation for an upcoming procedure procedure, ask about lowering blood pressure		14%	1

Total Responses: 7

Appendix B

1. Do you feel confident using the patient portal website on your own? (Pick One - Survey Question)

Answer		Percent	Total
Yes		100%	7
No		0%	0

Total Responses: 7

2. Please tell us if you agree or disagree with the following statements. (Likert - Survey Question)

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I am more inclined to use the Patient Portal after this class.	0 (0%)	0 (0%)	1 (14%)	5 (71%)	1 (14%)
The right amount of information was covered in class.	0 (0%)	0 (0%)	0 (0%)	5 (71%)	2 (28%)
This information was meaningful to me.	0 (0%)	0 (0%)	1 (14%)	4 (57%)	2 (28%)
I would recommend others take this session.	0 (0%)	0 (0%)	0 (0%)	4 (57%)	3 (42%)


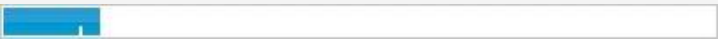



Total Responses: 7

3. Please tell us what you liked most about the class.

Answer	Percent	Total
easy to understand	14%	1
I didn't realize all the options it had.	14%	1
I probably will use the website to look up some of these things. I didn't know you could do them online.	14%	1
it was very personal and informal.	14%	1
it went through the site quickly and was not a lecture	14%	1
The information was good.	14%	1
user friendly	14%	1

Total Responses: 7

4. What else should we have added to the topics that were covered? (Select all that apply.)

Answer	Percent	Total
Advanced care and planning 	14%	1
Checking and paying medical bills through the portal 	14%	1
Nothing, the topics were perfect. 	29%	2
Renewing prescriptions 	29%	2
Renewing prescriptions, Checking and paying medical bills through the portal 	14%	1

Total Responses: 7

5. Please tell us what you did not like about the class. (Essay - Survey Question)

Answer	Percent	Total
I want to know if my other doctors have this too.	14%	1
I have a lot of perscriptions. That would have been nice to see that too.	14%	1
I thought it could track more health information. If it can I would like to know more about that	14%	1
It could have covered more parts of the website.	14%	1
It didn't cover some of the parts that looked very useful.	14%	1
nothing since it was thorough enough	14%	1
The information was good but I think it is still faster to call the office for most things	14%	1

Total Responses: 7