



Using Patient Portals to Achieve Meaningful Use Stage 2

Introduction

A **patient portal** is a secure application accessible via the Internet that allows patients to interact with their healthcare provider. The patient portal allows patients to view parts of their medical record (chosen by the healthcare provider) and communicate with their provider through secure messaging.

To meet the 2014 requirements of the Centers for Medicare & Medicaid Services (CMS) Electronic Health Record (EHR) Incentive Program, often referred to as “Meaningful Use,” healthcare providers must have a patient portal installed. The requirements for how actively the provider and patients use the portal are dependent upon the Stage of Meaningful Use in which the provider is participating.

- For Meaningful Use Stage 2, the provider must interact with the patients using the portal.
- For Meaningful Use Stage 1 in 2014 and beyond, patients must have the ability to view their information through the portal, but there are no requirements that patients must be able to interact with the provider through the portal. However, it is recommended that providers begin to foster interaction with patients online as soon as possible.

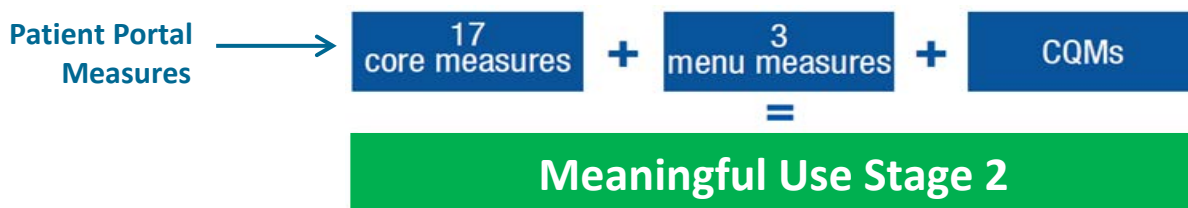
Patient Portals in Meaningful Use

CMS believes that healthcare providers are in the best position to encourage patients to take a more active role in their healthcare by using Health Information Technology (Health IT) such as a patient portal or **personal health record (PHR)**. The information below provides details about each EHR Incentive Program (Meaningful Use) measure that requires a patient portal, along with a checklist to review individual requirements.

To demonstrate Meaningful Use, providers must meet the thresholds for the measures (or qualify for an exclusion). There are no partial incentive payments – failure to meet *any* of the requirements results in no payment, and possible subjection to a penalty.

A Patient Portal is required in order to meet the Core Measures for Meaningful Use Stage 2.

The Patient Portal may also help to meet a menu measure and several additional measures because it encourages patients to populate their health information online. It also allows providers to exchange clinical information with their patients electronically.



** For those providers and hospitals still attesting to Stage 1 in 2014: You are required to use a patient portal to provide discharge instructions/clinical summaries to 50% of your patients electronically.*



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Overview of Objectives

In Meaningful Use Stage 2 there are 17 **Core Objectives**. Eligible Providers must meet ALL 17 Core Measures.

Stage 2 Meaningful Use: 17 Core Objectives

Patient Portal REQUIRED	1. Use computerized provider order entry (CPOE) for medication, laboratory and radiology orders	10. Incorporate clinical lab-test results into Certified EHR Technology
	2. Generate and transmit permissible prescriptions electronically (eRx)	11. Generate lists of patients by specific conditions to use for quality improvement, reduction of disparities, research, or outreach
	3. Record demographic information	12. Use clinically relevant information to identify patients who should receive reminders for preventive/follow-up care
Patient Portal HELPS	4. Record and chart changes in vital signs	13. Use certified EHR technology to identify patient-specific education resources
	5. Record smoking status for patients 13 years old or older	14. Perform medication reconciliation
	6. Use clinical decision support to improve performance on high-priority health conditions	15. Provide summary of care record for each transition of care or referral
	7. Provide patients the ability to view online, download and transmit their health information	16. Submit electronic data to immunization registries
	8. Provide clinical summaries for patients for each office visit	17. Use secure electronic messaging to communicate with patients on relevant health information
	9. Protect electronic health information created or maintained by Certified EHR Technology	

In Meaningful Use Stage 3 there are 6 **Menu Objectives**. Eligible Providers must meet AT LEAST 3 Menu Objectives. There are no measures that require a Patient Portal; however, the Patient Portal may help you to meet the requirements.

Meaningful Use: 6 Menu Objectives

Patient Portal HELPS	1. Submit electronic syndromic surveillance data to public health agencies
	2. Record electronic notes in patient records
	3. Imaging results accessible through CEHRT
	4. Record patient family health history
	5. Report cancer cases to a public health central cancer registry
	6. Report specific cases to a specialized registry



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Core Objectives: Patient Portal Guidance

Core Objective 3

Summary

Record the following demographics: preferred language, sex, race, ethnicity, date of birth.

Patient Portal HELPS

Record demographics	
What this measure requires	More than 80% of all unique patients seen by the EP have demographics recorded as structured data.
What that means for you	For more than 80% of your patients you have to record the following in the certified EHR: <ul style="list-style-type: none"> • Preferred language • Gender • Race • Ethnicity • Date of Birth
Are you excluded from doing this?	There are no exclusions. Everyone must meet this objective.

Comment: You are not required to have the patient record this information. However, providing the patient the ability to record the information and have it available in the EHR may help you to meet this measure.

Core Objective 3 Checklist

- Can the patient enter Demographics into the patient portal?
 - Preferred language
 - Gender
 - Race
 - Ethnicity
 - Date of birth

- Is the patient recorded information available in the EHR, and can you update the patient's record using this information?

- Do you have a report/dashboard monitoring that more than 80% of your patients have demographics recorded?



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Core Objective 7

Summary

Provide patients the ability to view online, download and transmit their health information within four (4) business days of the information being available to the EP.

Patient Portal REQUIRED

Provide patients the ability to view online, download and transmit their health information	
What this measure requires	<ul style="list-style-type: none"> • More than 50% of all unique patients are provided online access to their health information within 4 business days after the information is available to the EP. • More than 5% of all unique patients view, download or transmit to a third party their health information.
What that means for you	Not only do you have to provide online access to health information for over half of your patients, you also have to make sure that more than 5% of your patients actually access the online health information you have made available.
Are you excluded from doing this?	<p>You can be excluded from meeting this objective if you do not order or create any of the required information, except for "Patient name" and "Provider name" and office contact information.</p> <p>You can also be excluded if your practice is in an area with low broadband availability. For more information about qualifying for this exclusion, visit the Stage 2 Meaningful Use Specification Sheet for this objective http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/downloads/Stage2_EPCore_7_PatientElectronicAccess.pdf.</p>

Core Objective 7 Checklist

Measure 1

- Are you able to easily provide User Name / Passwords to your patients?

- Is information available to patients within 4 business days?

- Is the information provided through a secure channel that is encrypted and integrity-protected?

- Is the following information available?
 - Patient name
 - Provider's name & office contact information
 - Current and past Problem List
 - Procedures
 - Laboratory test results
 - Current medication list and medication history
 - Current medication allergy list and medication allergy history



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- Vital signs (height, weight, blood pressure, BMI, growth charts)
 - Smoking status
 - Demographic information (preferred language, sex, race, ethnicity, date of birth)
 - Care plan, including goals & instructions
 - Known care team members, including the PCP
-

Do you have a report/dashboard monitoring that information was provided to 50% of your patients within 4 business days?

Measure 2

Is the portal easy to use?

Does the portal provide patients instructions on how to download and transmit information?

Can patients view, download and transmit to a third party?

Do you have a report/dashboard monitoring that 5% of your patients access the information?



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Core Objective 8

Summary

Provide clinical summaries for patients for each office visit

Patient Portal HELPS

Provide clinical summaries for patients for each office visit	
What this measure requires	Clinical summaries provided to patients within one business day for more than 50% of office visits.
What that means for you	For more than half of your office visits, patients receive a clinical summary within one day of the visit.
Are you excluded from doing this?	If you do not conduct any office visits, you can be excluded from meeting this objective.

Core Objective 8 Checklist

- Is the Clinical Summary available to patients within 1 business day for office visits?

- Is the following information available?
 - Patient Name
 - Provider's Name & contact information
 - Date and location of the visit
 - Reason for the visit
 - Current problem list
 - Current medication list
 - Current medication allergy list
 - Procedures performed during the visit
 - Immunizations / Medications administered during the visit
 - Vital signs taken during the visit (or other recent vital signs)
 - Laboratory test results
 - List of diagnostic tests pending
 - Clinical instructions
 - Future appointments
 - Referrals to other providers
 - Future scheduled tests
 - Demographic information maintained (sex, race, ethnicity, DOB, language)
 - Smoking status
 - Care Plan information, including goals & instructions
 - Recommended patient decision aids (if applicable to the visit)

- Do you have a report/dashboard monitoring that Clinical Summaries were provided within 1 business day to 50% of your patients seen for office visits?



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Eligible Provider (EP) Edition
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Core Objective 12

Summary

Use clinically relevant information to identify patients who should receive reminders for preventive/follow-up care and send these patients the reminders, per patient preference.

Patient Portal HELPS

Identify patients who should receive reminders for preventive/follow-up care	
What this measure requires	More than 10% of all unique patients who have had 2 or more office visits with the EP within the 24 months before the beginning of the EHR reporting period were sent a reminder, per patient preference when available.
What that means for you	The measure for this objective has changed slightly from Stage 1. Now you can limit patients who receive a reminder to those with whom you have more frequent contact—over 10% of patients with 2 or more office visits within the last 24 months. The reminder should be sent via the patient's preference of the methods available.
Are you excluded from doing this?	You can be excluded from this measure if you had no office visits in the 24 months before the reporting period.

COMMENT

You are not required to send Education resources electronically. However, the ability to send Education resources electronically may help you meet this measure.

Core Objective 12 Checklist

- Can you identify patients who should receive reminders for preventive/follow-up care?

- Can you electronically select, sort, access and create patient lists by date and time, by communication preference and at least 1 of the following?
 - Problems
 - Medication
 - Medication allergies
 - Demographics
 - Laboratory tests and values/results

- Can you record patient preference for receiving messages (mail, phone or secure messaging)?

- Can you send a reminder, per patient preference?

- Do you have a report/dashboard monitoring that more than 10% of your patients were sent a Reminder?



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Eligible Provider (EP) Edition
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Core Objective 13

Summary

Use clinically relevant information from Certified EHR Technology to identify patient-specific education resources and provide those resources to the patient.

Patient Portal HELPS

Identify patient-specific education resources and provide those resources to the patient	
What this measure requires	More than 10% of all unique patients with office visits are provided patient-specific education resources.
What that means for you	For over 10% of your patients, you should use your certified EHR's ability to recommend educational resources to your patients. Your EHR is certified with the ability to make these recommendations based on patient-specific variables, such as chronic conditions (e.g., diabetes).
Are you excluded from doing this?	You can be excluded if you have no office visits during the reporting period.

Core Objective 13 Checklist

- Can you electronically send Education resources?

- Do you have a report/dashboard monitoring that more than 10% of your patients received Education resources?



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Core Objective 17

Summary

A secure message was sent using the electronic messaging function of CEHRT by more than 5 (five) percent of unique patients (or their authorized representatives) seen by the EP during the EHR reporting period.

Patient Portal REQUIRED

Use secure electronic messaging to communicate with patients

What this measure requires	A secure message was sent using the electronic messaging function of CEHRT by more than 5% of unique patients (or their authorized representatives) seen by the EP during the EHR reporting period.
What that means for you	Certified EHR technology will contain the capability to send secure messages between you and your patients. In order to meet this objective, you have to make sure that more than 5% of your patients actually use this capability by sending you a secure message.
Are you excluded from doing this?	You can be excluded if you have no office visits during the reporting period. You can also be excluded if you practice in an area with low broadband availability. For more information about qualifying for this exclusion, visit the Stage 2 Meaningful Use Specification Sheet for this objective http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/downloads/Stage2_EPCore_17_UseSecureElectronicMessaging.pdf .

Core Objective 17 Checklist

- Can a patient send a Secure message to the EP?

- Do you have a report/dashboard monitoring that more than 5% of your patients have sent at least one secure message? (Stage 2 only)



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Menu Objectives: Patient Portal Guidance

Menu Objective 4

Summary

Record patient family health as structured data.

Patient Portal HELPS

Record patient family health history	
What this measure requires	More than 20% of all unique patients seen by the EP during the EHR reporting period have a structured data entry for one or more first-degree relatives.
What that means for you	You must record family health history for over 20% of your patients. The family health history must include one or more first-degree relatives.
Are you excluded from doing this?	You can be excluded if you have no office visits during the reporting period.

COMMENT

You are not required to have the patient record this information. However, providing the patient the ability to record the information and have it available in the EHR may help you meet this measure.

Menu Objective 4 Checklist

- Can the patient enter Family Health History into the patient portal?

- Is the patient recorded information available in the EHR and can you update the patient's record using this information?

- Do you have a report/dashboard monitoring that more than 20% of your patients have Family History recorded?



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Final Comments

The key to success is having a Patient Portal that contains the information patients want AND is easy for patients to use. If you can't get meaningful information to the portal, or your patients don't use the portal, you won't meet the measures.

Checklist for Success

- Can I send meaningful information to the portal?

- Can I easily provide Activation Information to patients?

- If a patient forgets their User Name / Password, can they easily retrieve it?

- Is the patient portal easy to use for patients of all ages?

- Is it easy for a patient to download & transmit information?

- If a patient has a question about information on the portal, is there someone they can call?

- Is the portal available on mobile devices?

- Is the portal available in multiple languages?

This document is provided for general information purposes. Nothing in this document should be construed as legal advice, and you should obtain your own appropriate legal and other advice on this subject matter.

All Meaningful Use charts in this document come from the Centers for Medicare & Medicaid Services (CMS) website at http://www.cms.gov/Regulations-and-Guidance/Legislation/EHRIncentivePrograms/Stage_2.html.



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