TEXAS TECH UNIVERSITY HEALTH SCIENCES CENTER™ EL PASO

Ambulatory Clinic Policy and Procedure

Title: **PATIENT PORTAL POLICY**	Policy Number: **EP 5.16**
Regulation Reference: Texas Health Steps	Effective Date: **7/2017**

Policy Statement:

It is the policy of the Texas Tech University Health Sciences Center El Paso (TTUHSC El Paso) to encourage engagement with the patient in their own healthcare by the use of technology to deliver secure communication between patients and clinical teams.

Staff at Texas Tech University Health Sciences Center El Paso (TTUHSC El Paso) Ambulatory Clinics will provide patients and authorized family members or legal guardian the opportunity to access selected protected health information (PHI) using a secure, confidential website referred to in this policy as the patient "portal". The portal gives the patient 24 hour access to elements of their medical records and a means of communication with their clinical team Monday through Friday 8:00 a.m. to 5:00 p.m. with the exception of scheduled holiday times. The goal of such convenient, real-time access to PHI is to educate the patient about their existing health care conditions and treatments and engage the patient in assuming greater responsibility for, and participation in, their own health care decisions.

Patients can view their portal accounts anywhere they have Internet access. They can review parts of their medical record including immunizations, lab results, active problems and medications, and more. Patients can view upcoming and past appointments, request new appointments and prescription refills, and request updates to their demographic information. Users can also send messages to their clinic asking non-urgent medical questions or to request medical documentation.   Additional features and content may be added as it becomes available.

TTUHSC El Paso shall utilize a secure internet connection to maintain the privacy and security of each patient's PHI. This secure connection shall be accessible by each patient only after unique verification information has been established in accordance with this policy. The patient shall be solely responsible for maintaining the confidentiality of their own authentication information.

Scope and Distribution:

This policy applies and will be distributed to all TTUHSC El Paso ambulatory clinics.

Procedure:

All Texas Tech Physicians of El Paso Clinics (excluding Transmountain Practice)

A. <u>Inviting and Activating a Portal Account</u>: Clinic personnel should invite the patient, parent or legal guardian to sign-up for the portal when a previously uninvited patient presents to the clinic for an episode of care and for each new patient by generating a PIN from GE Centricity EMR. The issued PIN is only valid for 30 days and will need to be regenerated if the patient did not activate their Patient Portal account. Written instructions will be provided explaining how to access the secure web site and create their portal account using the unique PIN provided.   A PIN can be issued to a patient, parent or guardian over the phone or through the Patient Portal support email, as long as the following are verified:

1. <u>Last four of SSN</u>
2. <u>Patient's zip code (as it appears on the patient's chart)</u>
3. <u>Full Name (as it appears on the patient's chart)</u>

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B. <u>Portal Registration</u>: After receiving a PIN, the patient, parent or guardian will access the secure web site and follow the steps to register their Patient Portal account. They will create an account username and password and answer the required security questions. Patients will complete registration by using the unique PIN to link their portal account to their medical record. The patient, parent or guardian then becomes responsible for maintaining the confidentiality of the username and password, and for any and all activities that are conducted through the Patient Portal.

Texas Tech Physicians of El Paso at Transmountain

A. <u>Inviting and Activating a Portal Account</u>: Patients who meet the following criterion will automatically be sent an invite to the Cerner Healthelife Portal:
1. <u>Patient had an arrived encounter the previous day</u>
2. <u>Patient is older than the age of emancipation</u>
3. <u>Patient has not declined patient portal participation on that visit</u>
4. <u>Patient has not previously accepted a patient portal invitation</u>
5. <u>Patient does not have an active invitation</u>
6. <u>Patient has a valid email documented in their chart</u>
7. <u>Patient has a valid zip code documented in their chart</u>

Clinic personnel should use the Healthelife Administration Tool to send a Patient Portal invitation manually for proxy access. Invites are valid for 90 days and can be re-sent to the patient upon request.

All Clinics

<u>Correspondence with Patients through the Patient Portal</u>: All correspondence between patients and their clinic/provider in the Patient Portal is done through Secure Messaging. Messages sent by patients through their portal account do not go directly to the provider's secure messaging inbox. They are instead sent to the provider's assigned clinic's secure messaging inbox for triage. Clinical staff will review and address all clinical issues and forward administrative issues to the proper person. They may forward the message directly to the provider, if necessary. The provider may respond to the patient or have staff complete the communication. Responses to any communication received from a patient through the portal should be sent no later than (3) business days.

1. Patients are advised on the portal messaging webpage that the portal is not appropriate for communicating urgent medical issues or anything that requires immediate attention. Patients are instructed on the portal site that if an emergency exists, to dial 911.

2. When new information is available in the patient's portal inbox, a message is automatically sent to the patient's email address, notifying him or her to log in to view the information.

3. Any direct communication regarding clinical information sent outside of the patient portal to an external email address should be sent in a secure encrypted manner

. <u>Adolescent Patients</u>:

1. Legal guardians or parents of patients age 0-12 may gain access to the portal account with proxy access for a child.
2. When the child reaches the age of 13, the portal account will be automatically deactivated. EMR staff will run monthly reports for adolescent patients nearing 13 years of age. They will notify the clinics at 60 and 30 days prior to the adolescent patient's 13th birthday so that letters can be sent to the parents/patient reminding them that the portal account access will be deactivated on the child's birthdate.

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3. For parents/caregivers of patients reaching the age of 13 using the Texas Tech Physicians of El Paso at Transmountain Patient Portal will receive an e-mail notification 30 days prior to the patient's birthdate notifying them that their access will be revoked.

4. Patients ages 13 to 18, parents, authorized family members, or legal guardian may request Patient Portal Proxy Access by completing a Proxy Access form.

. Reason for Deactivating Portal Account:

A portal account may be deactivated for the following reasons:

1. Patient reaches age 13.
2. Patient requests a deactivation
3. Legal or medical guardian change
4. Patient terminates care
5. Patient violates the portal conditions and terms, uses abusive language or uses the portal for emergencies.
6. Patient expires.
7. If the physician believes that access to the portal is not in the patient's best interest.

Contact should be made with Clinic Information Systems at (915) 215-4111, option 3, to implement portal access termination for any of these reasons.

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Signatory approval on file by:	Juan Figueroa, M.D. Director of Clinical Operations Clinic Operations Committee, Chair Paul L. Foster School of Medicine		