Los Angeles County Department of Health Services

Policy & Procedure Title:	Patient Portal Policy			
Category:	100-199 General Administration		**Policy No.:**	101.03
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DHS Division/Unit of Origin:	Ambulatory Care Network			
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Distribution: DHS-wide ☒	**If not DHS-wide, other distribution:**			

PURPOSE:

The purpose of this policy is to provide guidance to Department of Health Services (DHS) workforce on the use of DHS' ORCHID Patient Portal and to delineate responsibilities that will facilitate effective and secure communications between DHS and its consumers. The DHS ORCHID Patient Portal delivers secure messages between patients or their authorized representatives and clinical teams via the patient portal. The portal can be accessed anywhere the patient has Internet access. The portal allows patients to view designated elements of their medical record; request appointments and receive appointment reminders; cancel appointments; access important health information; view their medication list; request prescriptions; immunizations; test results; obtain educational information; and maintain account information.

DEFINITION(S):

A. Portal – A secure website where patient medical information is stored
B. Consumer – the patient, authorized family member or Proxy
C. Proxy (i.e. Authorized Representative) – A authorized person appointed to manage a patient's portal information
D. Enrollment – The process of setting up a portal account
E. Activate – The patient process of activating an enrollment

POLICY:

It is the policy of the DHS to provide patients and authorized representatives the opportunity to enroll in a secure, confidential and easy-to-use website that provides patients access to

The mission of the Los Angeles County Department of Health Services is to ensure access to high-quality, patient-centered, cost-effective health care to Los Angeles County residents through direct services at DHS facilities and through collaboration with community and university partners.

Revision/Review Dates:
Department Head/Designee Approval:

designated elements of their medical record 24 hours a day, 7 days a week and access to their clinical team Monday through Friday 8:00 a.m. to 4:30 p.m.

Because the patient portal is an online, internet-based method of communications, DHS will utilize a secure internet connection to maintain the privacy and security of patient medical information and appropriate user authentication as directed through various State and federal laws and regulations and DHS privacy and security policies and procedures regarding the confidentiality of protected health information.

PROCEDURE:

A. Secure Messaging
   1. All electronic communication with Consumers must occur through the ORCHID Patient Portal
   2. Responses to any communication received from a Consumer through the portal should be sent within three (3) business days.
   3. Received messages do not go directly to providers.
      a. Designated Registered Nurses will handle all clinically related messages.
      b. Designated Clerical staff will handle all non-clinical related messages.
      c. Staff will speak directly with the provider if necessary.
   4. Responses from LA-DHS to the Consumer do not leave the portal and must be retrieved by the Consumer via the portal. A notification is sent to the Consumer's e-mail that a new portal message has posted to their portal.
   5. The portal is not appropriate for communicating urgent medical issues or matters that require immediate attention.

B. Sending a Secure Message to a Consumer
   1. Log onto PowerChart
   2. Access the patient chart
   3. Select "Communicate," then select "Message"
      a. A popup window will appear with options to compose the message.
      b. In the New Message popup, select the intended recipient of the message in the "Patient" field located in the upper right corner of the window. If the intended recipient is a current portal user, an option for "To Consumer" will be available on the right side of the screen. The checkbox next to "To Consumer"
      Note: If "To Consumer" is not available, it will not be possible to send a message to that patient.
   4. To forward a Result to a patient
      a. Click "Results" to endorse folder.
      b. Open the result, and then click "Create" in the top left.
      c. Select a pre-set message template from the "Subject" dropdown or enter a free text subject.
      d. When the message is complete, ensure "To Consumer" is checked and click "Send."

C. Receiving a Secure Message from a Patient
1. Consumer messages sent from the portal will be routed to a messaging pool where they will be evaluated by the supporting staff members.
   a. Clinically related messages will route to a clinical pool with designated registered nurses who will review the messages.
   b. Non-clinically related messages will route to a clerical pool with designated clerical staff who will review the messages.
   c. Messages requiring provider review will be forwarded to the appropriate provider.
2. Messages forwarded/generated will be found in the provider's "General Messages" section of their Message Center.
   a. To reply to a Consumer message that has been forwarded:
      i. Select and open the message and click "Reply."
      ii. When the message is complete, ensure "To Consumer" is checked and click "Send."
      Note: If the message is clinically relevant, there is also the option to "save to chart." Selecting this feature will save the message to the patient's chart as a document.

D. Adolescent Patients
1. Patients age 0-11 years must have a Proxy who is either a parent or legal guardian.
2. Once an adolescent approaches age 12, a message will be sent 30 days prior to their birthday notifying the Proxy that the adolescent's portal account and the Proxy's access will be terminated when the patient turns 12 years of age.
3. At age 12, the adolescent patient may sign up for their own portal account and they can access their record independently through the portal and their own confidential e-mail.
   a. The adolescent patient will need to call the provider's office to have an invitation sent so that they can create their own portal account.
   b. If the adolescent patient will need to re-grant Proxy access to the parent or guardian they will need to contact their provider's office and have an invite resent to the appropriate e-mail address. The parent or legal guardian can re-claim the invitation from the Portal to regain access to the adolescent patient's account.
   c. Note: State law requires special handling of adolescent records once they reach age 12. Parents still have full access through Medical Records Release of Information, except for very specific conditions and diagnoses that require the adolescent's consent prior to releasing the information.
4. Once an adolescent approaches age 18, a message will be sent 30 days prior to their birthday notifying the patient or Proxy that the portal account and access will be terminated when the patient turns 18 years of age.

E. Patient Enrollment/Sign Up
1. A person may sign up for the ORCHID Patient Portal if they have been a patient at a DHS facility and possesses a valid e-mail address.

2. Registration staff will check a patient's portal status.
3. If the patient does not have a portal account, staff will make every effort to provide guidance and offer assistance with the sign up process.
4. Staff will print the portal information with instructions on how to sign up if the patient decides to do his/her own activation at home.

F. Enrollment Instructions
    1. Registration staff will log into the PMlaunch application.
    2. Click on the "Portal Registration" icon.
    3. Perform the appropriate patient search.
    4. The following fields must be completed:
        a. Record Consumer interest in having a portal account
            i. Yes, Generate Invitation
            ii. No, Not interested
            iii. Note: If an invitation has already been sent this field will be pre-populated with "invitation sent." Staff should remind the patient to check their e-mail to claim their account.
        b. E-mail Address
            i. This field must be captured to send a Consumer their invitation.
            ii. When registering a minor, the e-mail address of the Proxy should be captured within this field.
        c. Security Question
            i. Select a question from the dropdown and ask the Consumer to respond.
        d. Security Answer
            i. Enter the answer to the Security Question here.

G. Deactivating a Portal Account
    1. A portal account may be deactivated for the following reasons:
        a. Patient reaches age 12
        b. Patient reaches age 18
        c. Patient requests a deactivation
        d. A proxy change request
        e. A patient terminates care
        f. LA-DHS terminates the clinical relationship
        g. A patient violates the portal terms, uses abusive language or use of the portal for emergencies.
        h. A patient expires
        i. If an LA-DHS employee feels that a patient is using abusive language or is repeatedly violating the terms and conditions of use, the employee should complete an incident report.