Patient Portal Implementation Practices

Pre-implementation

**FORM A PORTAL TEAM**

- Have an actively involved physician champion
  - The team should be comprised of a physician, clinical nurse or MA, front office staff and a patient with technical abilities

**DEVELOP A PLAN**

- Reach out to your HITArkansas implementation specialist for assistance on the following questions
  - What are the goals of the portal?
  - Which features and services should we offer?
  - Should these features be offered at once or phased in one at a time?
  - Will the portal be open initially to all patients or a select group?
  - Decide how you will handle marketing, enrollment, training and support for patients’ use of the portal.

**DEVELOP A PATIENT PORTAL POLICY AND PROCEDURES DOCUMENT**

- Policy and procedures examples: https://www.slideshare.net/aschettino/patient-portal-toolkitfinal-copy
- Contact your implementation specialist for further assistance

**EDUCATE STAFF MEMBERS**

- Prior to portal implementation, all staff members need to be educated on the patient portal
  - Assign roles and responsibilities
  - Review features and benefits
  - Staff training
Launching Your Patient Portal

ADVERTISE THE PORTAL

- This should be done prior to and during portal implementation
  - Signs/posters – Display in all office areas (lobby, nurses station, hallways, exam rooms)
  - Educational flyers
  - “Ask me about our Patient Portal” buttons for staff
  - Add a quick link to the patient portal from the clinic website

MAKE IT EVERYONE’S JOB TO ENCOURAGE PATIENT ENROLLMENT

- Create multiple patient touch points, from the front office to the physician
  - Display posters/flyers
  - Develop talking points for staff
  - Encourage nurses and physicians to discuss the portal with patients prior to leaving the exam room

- Simplify the registration process
  - Options: Bulk enrollment or have patients register at kiosks in the clinic; designate staff to assist patients and troubleshoot
  - Develop simple registration sheets and have them available for patients in the office
  - Include portal information in patient reminders
  - Email portal information to all patients with email addresses on file

- Educate patients
  - Develop procedure/workflow in which patients are educated on portal
  - Verbally encourage patient sign-up during patient visits
  - Develop easy-to-follow, step-by-step instructions sheets or record a training video and post to your website
    - How to sign in
    - What features are available
    - Where to find lab results, messages, prescription refills and scheduling appointments, etc.

BEST PRACTICE: Request all staff members enroll themselves and their immediate family members to test access to the portal. Recruit a few patients to enroll in the portal, utilizing your instructions and providing feedback. This will help you identify and correct any issues before going live with all patients.