Tips for Successful Patient Engagement

Continuous encouragement and education

- **THE PROVIDER CHAMPION:** Providers need to encourage staff and sell the benefits for the clinic and patients regarding portal utilization
  - **Provider:** Leading the way with patients
    - Portal provides access to patients for:
      - Communication directly with the provider
      - Submitting and receiving answers to health care questions
      - Efficient access to lab results, medication lists and clinical summaries

- **ENCOURAGEMENT:** All staff members, including the front office and clinical personnel, inform patients about the portal and encourage use of the portal

- **EDUCATION:** Designate staff members to demonstrate the portal to patients, focusing on ease of use and benefits. This team is responsible for ongoing patient education as new functionality is added

- **PERSONALIZATION:** Incorporate interactive, personalized tools
  - Patients are more likely to register for and continue to use a portal that has interactive decision tools and personalized messaging/tools

Keys to engagement

- **PROVIDER NEEDS TO TAKE OWNERSHIP OF ITS PORTAL** and personally educate and lead patients. The provider’s influence is key to engaging patient use of the portal

- **ENCOURAGE ONGOING FEEDBACK FROM PATIENTS**
  - Identify features they use most frequently
  - Identify any barriers encountered
  - Provide suggestions for new functionality
  - Identify functions of the portal that may not be working correctly