



A Patient Portal Redeployment Guide and Resource Toolkit Commissioned by The California Health Care Safety Net Institute

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A Step-by-Step Patient Portal Redeployment Guide and Resource Toolkit

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About Meyers Health Consulting

Meyers Health Consulting is an independent consulting practice focused on supporting technological innovations and the successful integration of Social Determinants of Health screening, navigating and connecting in Safety Net Organizations. For more information on the author and his project portfolio, please visit <https://www.linkedin.com/in/jimmeyersdrph/>. Email: jim@meyershealthconsulting.com

About The California Health Care Safety Net Institute of California

The California Health Care Safety Net Institute (SNI) is the 501c3 affiliate of the [California Association of Public Hospitals and Health Systems](#) (CAPH) and supports California's public health care systems in their efforts to improve the way they deliver care. Since 1999, SNI has provided California's public health care systems with expert-led program offerings, hands-on technical assistance, and peer-learning opportunities, while working hand-in-hand with CAPH. More information at: www.safetynetinstitute.org

Guidance for Using this Guide and Toolkit

Intended Audience: The intended audience for this toolkit is deployment teams within organizations that are charged with improving patient portal active use. This is a guide to planning and kick-in off a redeployment effort and is not intended to guide the necessary sustainment activities that must follow for long term success.

Approach: The author intends the approach found in this Toolkit to be strategically different than an “enrollment push” focus found in many patient portal improvement campaigns. The goal of this Toolkit is to help a TIGER-type team have a basic set of steps they can consider and a set of example resources and lessons learned documents for each step. The focus is on high value patient portal uses. The steps provided follow a clear path to identifying high value patient portal uses for both the organization and the patients, improving those use processes, promoting those uses and then making it as easy as possible to enroll and actively use those high value functions. Enrollment and active use will then grow to the point where patient portal workflows and active use are a normalized part of the provider team and patient engagement process.

Instructions for Use: This toolkit has been written in sections that allow for a step-by-step deployment guidance written in a bullet list with accompanying resources. A patient portal “journey” starring a patient Maria, Doctor Garcia and Medical Assistant Tom’s starts the guide and continues into each section to give context. Access to shared resources is enabled by clicking on the purple wording (direct download links). Users will then be taken directly to the document or resource with either a direct download to the computer or by being opened in a user format in a separate browser window depending on the internet browser used.

Opportunity Statement: This toolkit is provided at a time of great disruption in the ways our safety net delivers care. At its best, the patient portal can be a vehicle to save time, optimize patient engagement and help lessen the many disparities found in health outcomes for the most vulnerable populations we serve.

The Journey: Maria, Doctor Garcia, Medical Assistance Tom and the Patient Portal

It was August and Maria opened her email to see that the elementary school had once again asked her to send in Julia's vaccination records and a signed annual physical for the start of school. For the past 3 years, this one email drove multiple calls, visits to the clinic and lots of frustration. This year she hoped it would be different.

Last month, Maria took Julia, her 8-year-old, in to see Doctor Garcia for her annual well-child visit. She saw an interesting poster about a patient "portal" that would allow her to send documents to her provider and even ask her provider questions online. The front desk clerk asked her if she would be interested in signing up for the portal, she said maybe next time. Inside, she was not sure she wanted to share her email address with the clinic.

When she saw Doctor Garcia, they had a discussion about the value Doctor Garcia had in using the patient portal to communicate with Maria online - it improved her and the clinic team ability to communicate with Maria whenever needed and it saved every time! When Maria shared she was concerned about sharing her email address, Doctor Garcia made it clear that the portal was as secure as the medical records have always been. Towards the end of the visit, Tom, the Medical Assistance rejoined the visit and asked if she would like to get her after visit summary electronically via the patient portal. Wow! Maria was convinced! She wanted to sign up for this portal! She shared her email address and was provided an iPad to enroll and set up parental access to her 8-year-old, Julia's, medical records. The clerk also helped her put a link on her smartphone main screen that opened an online version of the portal in Spanish.

As she sat looking at the email from the elementary school, she decided to give the portal a try. Maria took out her smartphone, clicked on the portal link and opened her patient portal. She found Julia's section and opened it up. The front screen had a message encouraging her to download Julia's vaccine record and a signed annual physical form for her school. She followed the directions, downloaded a PDF for both and attached them to a reply to the elementary school email. She was ecstatic! The portal saved her so much time - no extra visits or phone calls to the clinic or elementary school this year!

Step 1 – Start a Patient Portal Improvement Team

The Journey

Doctor Garcia was walking back to her exam room when Tom came around the corner. He seemed really excited. When asked what was up, Tom was relieved to say that the rumor of a “portal enrollment” push was incorrect – instead, the Chief Nurse told the MAs this morning that a team was being formed to take a new look at the patient portal and either scrap it or look for ways to deploy it to provider teams and the patients so that it actually works and saves everyone time! He was asked to join the team and he said “yes”!

Suggested Actions

- **Assign a team and a specific period of time for redeployment teamwork.** The senior leadership of the organization should:
 - Assign a team leader and allocate work time for team leadership functions
 - Assign team members to represent key organizational stakeholders and allocate work time for their participation in team activities
 - Name the team. Consider naming the team to promote cohesion and recognition of the importance of the effort (Patient Portal TIGER team, Patient Portal Improvement Project Team, Patient Portal Optimization Team, etc)
 - Set a period of time for the team to focus on improving active use of the patient portal. A common period of time for a team to build a successful plan, work action items and achieve positive results is one year.

Resources

- [***Patient Portal Deployment Guide for Portal Team Members***](#) (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of the portal team in the development and deployment of a patient portal, including selecting a multidisciplinary team, developing a work plan, and tracking progress.
- [***Patient Portal Deployment Guide for Clinic Executive Leadership***](#) (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of the executive sponsor on a patient portal development team, including oversight, setting priorities, and evaluating progressing.
- [***Patient Portal Deployment Guide for HIT Staff***](#) (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of Health Information Technology staff on a patient portal development team, including establishing role clarity, project management, and implementation preparation.
- [***Patient Portal Deployment Guide for Provider Champions***](#) (Tom Dawson, Full Circle Projects & Jim Meyers, DrPH) Guide to the role of provider champions in the engaging providers in portal deployment.

Step 2 – Orient the Team - Read Best Practices and Guides

The Journey

Doctor Garcia was impressed! Though Tom had missed a couple of mornings as her MA, he was obviously digging really deep into his new patient portal team assignment. The buzz around the clinic was picking up - this wasn't just another "project". The team had visited a local CHC that had seen great success with active use of their patient portal, they had read several "best in practice" studies and were meeting tomorrow with the portal vendor to look at all of the various functions of the portal (including functions they had yet to turn on).

Suggested Actions

- **Gain knowledge on patient portals and best practices for improving enrollment and use.** The attached resources are shared as background for working to improve patient portal enrollment and active use. It is recommended members read each one to gain context for the team's work and see examples of best practices.
- **Build knowledge on the functions available and turned on for the current portal.**
- **Assess the timing of any upcoming vendor changes to the patient portal versions and any potential impact to portal functions**

Resources

- [Was COVID-19 Healthcare's Use Case for the Patient Portal?](#) (Patient Engagement HIT Newsletter) Industry newsletter on the impact of COVID on patient portal use.
- [Moving the Needle on Active Patient Portal Use – A Celebration of Innovation in California's Safety Net – Webinar Slide Set](#) (Jim Meyers, DrPH) Slides detailing a general background for optimizing patient portal enrollment and use and ten innovative best practices in patient portal redeployment actions by California Safety Net health organizations.
- [Patient Portals in the Safety Net: Patient Portal Planning \(1 of 3\)](#) (California Health Care Foundation) The first in a series of papers that documents the experiences, lessons learned, and tools used by three California community health centers from establishing the vision, assessing barriers, incorporating patient voice, launching portal planning team, and more.
- [Patient Portals in the Safety Net: Implementation \(2 of 3\)](#) (California Health Care Foundation). The second in a series of papers sharing how California health systems tailored portals to their own operations and their unique patient populations.
- [Patient Portals in the Safety Net: Optimization \(3 of 3\)](#) (California Health Care Foundation) The third in a series of papers that document the experiences, lessons learned, and tools used by three California community health centers while increasing usage, expanding services, promoting long-term sustainability, driving quality improvement, and more.

Step 3 – Complete an Environmental Assessment

The Journey

It had been an inspiring week for Doctor Garcia. At the ALL STAFF meeting on Monday, the CMO had shown a 3-minute video of safety net providers and patients telling their story of why the portal was so important to them. After the video, the CIO demonstrated the full capabilities of the patient portal for providers and patients – she had no idea the portal could do so much! The CEO then made it clear that the new patient portal team was starting their work on a “discovery” phase before a year of “redeployment” of the portal for high value uses. Then, this morning, the CEO sent Dr Garcia an email asking her to complete a survey on her like, dislikes and hopes about the patient portal. The email made it clear it was short – 5 questions – 10 minutes of her time – all through an easy SurveyMonkey link. She was looking forward to taking the survey during her admin time today! And then, she just saw one of her favorite patients, Maria, for a clinic visit. Maria mentioned that she had just finished a short interview with her Spanish-speaking care navigator who asked her a few questions about the portal. Both were really pleased that they had been asked their opinions!

Suggested Actions

- **Providers, provider teams and staff**
 - Show all of the functions possible with the patient portal.
 - Ask them what patient portal function has the highest value for them and their patients. Ask what the key barriers they face in using the portal functions.
 - Consider online surveys, interviews and site visits.
- **Patients and caregivers**
 - Show all of the functions offered within the patient portal.
 - Ask them what patient portal function the highest value for them. Ask what the key barriers they face in using the portal functions.
 - Consider online surveys, patient interviews and fact-gathering conversations with those in the community with knowledge about how patients experience barriers with information technology and possible options for community-members to successfully use a patient portal in the future.
- **Collect available data on portal enrollment, active use and user satisfaction. Contact the patient portal vendor for assistance, as needed, to find and download user data. Review any patient portal satisfaction surveys collected in the recent past.**

Resources

- [**Patient Portal Provider Staff Research SurveyMonkey Survey**](#) (Jim Meyers, DrPH) This survey was created to give to key providers and staff to gain kick-off planning feedback on the current patient portal use environment.
- [**Patient Portal Online Satisfaction Survey – Patient Examples**](#) (Jim Meyers, DrPH) Three example questionnaires including multiple choice, checkbox, scale, and open-ended questions for collecting patient feedback; two questionnaires are in English, and one questionnaire is in Spanish.
- [**Patient Portal Users Tech Survey**](#) (Jim Meyers, DrPH) Sample questionnaire to assess patient access to phone and internet service to inform technology and portal strategy.
- [**Example Portal Virtual Feedback Group Invitation Letters**](#) (Los Angeles Department of Health Care Services, LA DHS) Sample letters used to invite stakeholders to join a feedback group, share the purpose of the group, explain how to join, and provide other relevant details; each letter is tailored to patients, providers, or other hospital system staff.
- [**Guidelines for a Virtual Patient Portal Feedback Group**](#) (Jim Meyers, DrPH) Guidelines tailored to patient portal feedback groups include tips and best practices for preparing discussion topics, collection processes, targeted recruitment, and many other considerations for successfully collecting regular feedback from targeted audiences.
- [**Patient Portal Online Satisfaction Survey - Staff Examples**](#) (High Plains Community Health Center) Example questionnaire to collect staff feedback about patient portals.

Step 4 – Choose Target Focus Areas and Supporting Action Items

The Journey

Tom was amazed at the process his team went through to understand and prioritize their work. After their “discovery” phase, the team really knew the patient portal, what worked, what didn’t, the barriers faced by staff and patients and now had several areas identified as high value portal uses for provider teams and the patients. He loved that senior leaders were holding to their promise – this was not to be an “enrollment push” – this was a journey to find the highest value uses for the patient portal for both provider teams and patients and build active use around those specific portal values. Sharing their knowledge learned of best practices from the field, their team met with their senior leadership team and key stakeholders and led a discussion and prioritization of the highest value patient portal improvement areas and specific action items they would work on in support of each improvement area.

Suggested Actions

- **Conduct a senior leader and stakeholder meeting to discuss and pick targeted high value patient portal improvement areas. If a meeting is not possible, conduct a stakeholder survey to collect feedback on potential high value portal improvement areas to focus on.**
- **Pick targeted high value patient portal improvement areas for the portal team to focus on during the redeployment period. Keep the number of improvement areas small enough to match the available assigned time for the teamwork. Consider assigning a person to lead each improvement team effort. Consider identifying people or departments that will have coordinating responsibilities for each improvement area.**
- **Discuss common action items for each targeted patient portal improvement area. Pick only a handful of action items – doable in a reasonable period of time. Consider a stakeholder survey to allow comment and prioritization of common action items for each improvement area if more input is desired. Prioritize action items for each of the patient portal improvement areas.**

Resources

- [Patient Portal Team Kick-off Prioritization Worksheet and Stakeholder Survey](#) (Jim Meyers, DrPH) A worksheet that leads a patient portal team in considering common steps in kicking off their portal redeployment and shares common patient portal improvement areas and action items they may choose to prioritize.

Step 5 – Build a Charter and Project Management Plan

The Journey

Doctor Garcia and Tom were eating lunch in the break area together and were sharing their praise for the organization's patient portal improvement plan for this next year. All staff had been emailed a detailed charter and supporting plan with clearly targeted improvement areas and actions to really make changes necessary to get the most out of the patient portal. Dr Garcia was super excited about her pediatric department being chosen as a high value patient portal improvement area. It was so encouraging that the portal team heard her voice in support of helping her patients get vaccine records and annual school physical letters through the patient portal. This was a perfect combination of high value for the provider teams and high value for the parent/patient – that sweet spot that drives up desire to use the portal! Interesting data charts were now posted in the break room with baseline portal use data. They were looking forward to the future of the patient portal!

Suggested Actions

- **Build a charter and/or a project plan.** The Charter or plan should include the overall project AIM Statement (using SMART guidelines), key focus areas, planned action items and metrics/measures.
- **Consider a formal project management tracking process for each action item.**
- **Review the portal use data available and choose measures and/or metrics for the portal team to track monthly progress.**
- **Have the charter or plan reviewed, revised as needed and then committed to by senior leadership.**

Resources

- [**Patient Portal Deployment Portal Team One-Year Work Plan**](#) (Jim Meyers, DrPH) Sample work plan to launch a patient portal in a one-year timeframe, including 16 elements and associated tasks from setting vision, training staff, preparing for mobile features, to providing non-English functionality, and more.
- [**Patient Portal Deployment Project Management Plan**](#) (Metro Community Provider Network) Sample project management plan including task name, duration, start and finish date, and status tracking
- [**Portal Project Management Tracking Form**](#) (Jim Meyers, DrPH) Sample project management task tracking Excel document, including tasks from convening portal team, reporting to senior leadership, writing job descriptions, developing marketing materials, developing staff workflows, and more.
- [**Case Study: Patient Portal Operational Tracking Charts**](#) (The Colorado Health Foundation) Examples of graphs displaying common patient portal operational measures, allowing the progress of a project to be tracked over time.
- [**Patient Portal Tracking Reports**](#) (White Mountain Research Associates) Example patient portal reports used to measure portal enrollment and engagement across dozens of indicators.
- [**Patient Portal Measures**](#) (Jim Meyers, DrPH) Commonly used measures in developing reports to assess and monitor how patients use portals, including user measures, operations measures, and satisfaction measures.

Step 6 – Act on the Plan -Engage Staff – Engage Patients – Measure Progress

The Journey

New posters were up in the waiting room with clear messaging on the high value of using the portal for getting patient documents! Patients were now actively interested in enrolling in the portal! The new computer set up in the lobby for portal enrollment and onsite follow-up use was getting lots of use. Additionally, an iPad was now available for families in the exam room so they can enroll and use the portal while waiting for their visit to start. At every step in the care process – call center, front desk, intake, patient visit, navigation to needed resources - staff really wanted to promote the portal for very specific high value reasons – and now it was really saving everyone lots of time. The number of calls and visits to the clinic to get copies of vaccine records and school physical letters had gone way down.

Suggested Actions

- Prepare for and conduct a project launch.
- Have the team meet regularly.
- Implement portal vendor software and hardware upgrades to support target use.
- Resource staff time to work on action items.
- Stay focused on working on high value uses of the portal.
- Engage staff – consider enrollment and active use competitions. Regularly survey for feedback and to gauge satisfaction. Consider an online/virtual staff feedback group.
- Engage patients. Regularly survey for feedback and to gauge satisfaction. Consider an online/virtual patient feedback group.

Resources

- The following are COVID-specific adaptations of posters that were funded by the California Health Care Foundation for free use and unlimited editing by all without additional permission required. They are in PowerPoint format for easy editing and poster printing.
 - [COVID Vaccine Area Poster English](#)
 - [Portal and COVID Vaccine Card English](#)
- **Poster Examples:** The following are posters that were funded by the California Health Care Foundation for free use and unlimited editing by all without additional permission required. They are in PowerPoint format for easy editing and poster printing.
 - [CHCF Poster Lab Room English](#)
 - [CHCF Poster Lab Room Spanish](#)
 - [CHCF Poster Waiting Room English](#)

- [CHCF Poster Waiting Room Spanish](#)
- [CHCF Poster Exam Room English](#)
- [CHCF Poster Exam Room Spanish](#)
- [Portal Sign-up One-page Infograph English](#) (Alameda Health System) Example of a one-page infograph given to patients to assist them with portal enrollment.
- [Patient Portals Marketing Video: Patient Perspectives](#) (California Healthcare Foundation) A three-minute video sharing patients' perspectives about why they use portals: convenience, partnership, communication, access, and more.
- [Example Set of 55 Common Patient Portal Messages and Staff Responses](#) (Western Sierra Medical Center) The spreadsheet has both common questions sent by patients through their patient portal message function and corresponding suggested staff responses.
- [Example Patient Portal Infographic](#) (LA DHS) An infographic for staff to share goals, relevant user & usage statistics, goals, strategies, and a provider spotlight.
- [Case Study – LA Health Department Party Prizes Boost Patient Portal Enrollment](#) (Center for Care Innovations) In pre-COVID days, there was nothing like the promise of a pie party/pizza party/tamale party—pick your favorite food adventure—to get the competitive juices flowing and tempt taste buds in the workplace, all to motivate staff to help patients enroll in the patient portal.
- [Patient Portal Training Toolkit](#) (LA DHS) Training materials for providers learning how to leverage the MyWellness Portal including team preparation prior to patient enrollment, sample scripts, data tracking instructions, and more.
- [Example Patient Portal Staff Competition Kickoff Video](#) (LA DHS) One minute video for providers and staff to increase patient portal enrollment through supportive education, friendly competition, and incentives.
- [Example eCW Portal Pre-Visit Questionnaire](#) (West County Health Center) Training material, including step-by-step picture instructions, on how patients and medical assistants complete and update pre-visit questionnaires to prepare for upcoming visits.

Appendix

The following is a spreadsheet with team kick-off, focus area and deployment action options.

Patient Portal Team Kick-off Prioritization Worksheet - Kick-off Steps and Options for Focus Improvement Areas and Action Items		
<p><i>This worksheet is shared for use for free. Please retain this attribution box in all future uses and adaptations. Please do not hesitate to reach out with any questions or requests for resources.</i></p> <p><i>Jim Meyers, 510-761-1609, jim@meyershealthconsulting.com</i></p> <p><i>Technical assistance made possible by generous funding from The California Safety-Net Institute</i></p> <p><i>©Meyers Health Consulting</i></p>		
Common Kick-off Steps		
<p>Step 1 –Start a Patient Portal Improvement Team</p> <p>Step 2 – Team Orientation - Read Best Practices and Guides</p> <p>Step 3 – Complete an Environmental Assessment</p> <p>Step 4 – Choose Target Focus Areas and Supporting Action Items - Using This Worksheet</p> <p>Step 5 – Build a Charter and Project Management Plan</p> <p>Step 6 – Act on the Plan -Engage Staff – Engage Patients – Measure Progress</p>		
Score Your Priority for Potential Portal Improvement Focus Areas		
Overview of Targeting Specific Improvement Areas	<ul style="list-style-type: none"> • Research, discuss and prioritize the highest value - most wanted - uses of the patient portal in very specific improvement areas. Consider prioritizing even short term uses that are hot right now (e.g. view COVID test results, COVID vaccine record retrieval) in addition to long term uses that reflect our new telehealth reality. • Build specific support actions to improve purposeful outreach, marketing, training, etc to these high potential portal success areas - versus just doing enterprise-wide general outreach to "enroll more patients in the portal". • A note of caution: Everyone is too busy for another general patient portal sign-up push - 	Remember: patient portal enrollment and active use growth that occurs as a result of targeting your action in very specific focus areas will also drive up general patient portal staff and patient awareness and use of the portal.
Covid-Specific Improvement Area Options	Improvement Area	Actions
Target COVID-Response High Value Focus Areas	Option: Focus on COVID test results patients.	Consider emailing all patients and outlining your process for screening and scheduling COVID testing. Allow them to sign up for a testing appointment and then work one-by-one with them to get enrolled in the portal if they are not enrolled. Provide email updates on the COVID testing process as appropriate. Remind them they do not need to call the clinic for updates. Send a message via portal to all patients after the COVID test reminding them how long the results can take, what results mean and how they can check for results via the portal. Remind them they can get a copy of their COVID test results via the patient portal at any time. Consider options for sending COVID positive test educational material to those who test positive and provide links to support services for food and income during their quarantine as needed.
	Option: Focus on COVID vaccine distribution and access to immunization records.	Consider emailing all patients and outlining the next steps in offering the vaccine. Allow them to sign up for distribution updates, vaccine opt-in and then work one-by-one with them to get enrolled in the portal. Provide email updates as the vaccine distribution process becomes more defined. Remind them they do not need to call the clinic for updates. When ready, offer appointment sign-up on the portal for both vaccine shots. Send a message via portal to all patients after the shot regarding common side effects and when/how to call the clinic if they experience unusual symptoms. Remind them they can get a copy of their CDC vaccination card via the patient portal at any time.

Non-Covid-Specific Improvement Area Options	Improvement Area Option	Specific Action Options
	Engage your provider teams one-by-one and help them focus on specific patients to target for enrollment and use of the portal.	Each provider and provider team know the patients who visit or call the clinic the most - and which could best be served by enrolling in and using the portal to handle most of their communication or information needs. Meet for 20 minutes with each provider and each provider team (e.g. nurse manager) and show each all of the functions available of the portal. Ask them for the names of each patient in their panel that could be best served by the portal. Contact the patient and help them enroll. Put their portal status on the huddle report. Put reminders in their record to mention the portal at every visit.
	Focus on virtual care, the portal and connection workflows related to telehealth	Engage with senior leaders on the emerging strategic plans for virtual care. Determine the role the patient portal will play in connecting to virtual care. Is there a plan to use the portal as the front door to all virtual care? Is there a specific set of uses of the patient portal that are critical to virtual care (connecting to video visits; sending and receiving from the patients their pre-visit surveys, patient education materials, questionnaires, appointment confirmation, virtual care readiness status, documents, pictures, etc; remote appointment check-in, etc).
	Focus on using the portal to administer surveys and questionnaires. This includes pre-visit intake/screening questions.	Turn on the portal option to administer documents, surveys and questionnaires. These could include annual health assessments, satisfaction questionnaires, pre-visit screening, etc. Some vendors have very good solutions via their mobile application - be sure to check that option.
	Focus on patients with their first chronic condition.	The patient portal affords an opportunity to share patient education materials and regular follow-up through the patient portal. Care management planning for these patients should consider the option of using the patient portal for care communications. Care teams could then target this population for enrollment and immediate active use of the portal for unique chronic disease management uses.
	Focus on care givers.	Outpatients can be helped by care givers and proxies having access to medication lists and options for requesting refills. Inpatients can be especially helped by having their care givers or proxies having full access to their patient portal. Uses include checking current care status and emailing questions to the care teams. Proxy access to patient status is particularly important in settings where patients are in isolation.
	Engage children's' (0-11) parents and teens (12-17) in the use of the portal.	Parents will especially benefit from access to their children's portal connection (email, appointment making, immunization records, absence excuse letters, etc) and teens (especially helpful for those who are being assisted in reproductive health clinics).
	Focus on remote patient monitoring options.	The patient portal can be a conduit for transferring remote patient monitoring data. Several examples of blood pressure reading collection are emerging in the safety net in California. Some use manual tracking tools and others use blood pressure devices that store and then transfer data directly through the portal to the EHR. Other examples are glucose monitoring and pulse oximeter readings.
	Focus on appointments	This would include appointment making, cancelling, reminding and confirming remotely through the portal.
	Focus on document transmission via the portal.	This functionality would be useful for all patient care areas. It would be helpful to focus on one use in one clinic to overcome any technology glitches and build example workflows - then spread to all clinics. This could include legal/consent documents (with specific signature verification processes), insurance information, proxy documents, custody paperwork and documents related to care (e.g. pictures of skin/wound).
	Specialty clinics (e.g. Derm clinic - focus on promoting the option to send a picture of the skin issue to your doc).	Some clinics are seeing significant improvements in patient engagement through virtual care. Examples are dermatology visits where patients can share pictures of their issues and behavioral health clinics where patients can consistently make their online appointments (after an initial in-person visit) and can share symptom surveys via the portal when they are experiencing a negative behavioral health incident.
	Please name	Please describe

Score Your Priority for Additional Action Items - Some Outside Your Targeted Improvement Areas (Above) - To Improve Overall Patient Enrollment and Active Use		
Action Category	Action Item Options	Description
1 Organizational Portal Strategic Planning and Redeployment	Build a patient portal optimization team and meet at least twice monthly.	Consider including stakeholders from IT, direct care, admin/front desk, admin/call center and include a senior leadership sponsor who attend periodically as well.
	Choose 2-3 patient portal improvement areas to work on for the next 6 months.	Prioritize by impact on highest value portal features for provider teams and patients and likelihood of success within 6 months to 1 year. Brief senior leadership and get their buy-in. Build SMART statements for each.
	Choose 4-5 action items for each portal improvement area.	For each action area: • Review the full list of common action items listed below to help put detailed tasks into each action item.
	For each action item - choose a person who is accountable for getting that action item completed.	Get buy-in from the person and their supervisor to dedicate time to complete the action in 6 months to 1 year.
	For each action item - identify any people who will be needed to coordinate the deployment of the action item in order to get it done.	Get buy-in from each person and their supervisors to dedicate time to help the team leader complete the action in 6 months to 1 year.
	Report Activity to Senior Leadership.	Get the patient portal team activities as a regular agenda item on a regular senior leadership operational update meeting. Use this platform to share project successes, barriers and needs.
	Other: please name	Please describe
2 Patient Portal Team Setup - Performance Measures	Add new members to the patient portal team to grow stakeholder representation.	Regular consider who else should join the portal team to enhance awareness of successful practices, barriers/challenges and who might have a significant impact on deployment success.
	Build team metrics.	Volume, efficiency, outcomes, and satisfaction measures: could include number of patients enrolled in portal; # of active users; # of Spanish users on portal; number of uses of the portal functions (# of messages sent, received, reviewed within 24 hours, etc); call center volume of portal assist calls; average wait times for call centers; patient no-show rates; provider/staff satisfaction with portal; and patient satisfaction with portal. You already have some metrics collected that you can choose good options for team reporting. New enrollee activation % is an interesting one you already collect. I like the message response average as well.
	Build dashboard metrics.	Show data on portal action items that are most meaningful for the entire enterprise (Active use changes by clinic/department, portal uses to connect to video visit, etc). Don't just show enrollment stats.
	Study the patient population enough to know: # of folks who have sought care just once; # who have sought care for one issue and then never returned; and, the regulars - the medical home patients. Then, figure out the enrollment and active use of these populations. What does it tell you? What target enrollment and active use should you want from each of the three?	
	Review the use of the term "activated" versus the term "active use". Both have important meaning - what is a reasonable target for	
	Other: please name	Please describe

3 Launch or Relaunch Plan	Relaunch Across the entire organization - create a specific portal project - relaunch marketing - with a focus of a specific timeline - one-year?	Enterprise-wide Portal Strategy - integrated with Virtual Care Strategy
	Relaunch to targeted uses - officially relaunch to a specific population and support with specific marketing and training.	
	Other: please name	Please describe
4 Vendor Relations and Interoperability	Work with the vendor on relaunch or target population support materials, training packages, admin reporting, new functions (video visit linking, etc).	This is important if the vendor connection has gone undeveloped by your team - the vendor has support personnel that can help if you ask - you are a big enough contract to get specific vendor support under your contract.
	Other: please name	Please describe
5 Enrollment and Password Reset	Study the key barriers to easy enrollment and password reset. Build a clear understanding of what are the hardest parts of enrollment and password reset.	This is about understanding the key issues. If you have a clear understanding already, you would limit attention to this action item.
	Consider options for improved user experience with enrollment. Consider online enrollment.	This is about responding to the key issues.
	Consider options for improved user experience with resetting a password. This could include online reset options and ease of use and call center/help line innovations to help clients reset their password (i.e. call center texts links to YouTube videos, links to reset web page, etc).	
	Other: please name	Please describe
6 Portal Features and Functions	Add links to SDOH resources.	
	Add information on COVID to share with patients/caregivers.	
	Add link to video visits.	
	Add link to share provider notes to comply with new federal guidelines on patient access to medical records.	
	Add link to pricing to comply with new federal laws on price transparency.	
	Other: please name	Please describe
7 Support Plan - Tech Advocate to Portal Specialist/Supervisor Job Descriptions	Review job descriptions from the field. What is a good set of job functions that grow a leader/manager to oversee the work of the portal team once the team dissolves. Who should provide oversight to patient portal management over time? Is this a service of IT or a care team leader or pop health or?	
	Other: please name	Please describe
8 Training Plan	Create patient portal use, enrollment, password reset, etc short videos and put them on YouTube. Have call center, clinic front and back end staff text YouTube links to patients who need help. These can also be shared with staff who run into patient portal use issues or need training.	Use simple screen capture with voice over video creation programs and don't get to involved in the production and editing - use the existing video education creation software available in the marketplace.
	Other: please name	Please describe

9 Patient Engagement and Feedback	Survey to recent patient user of the portal.	
	Ask all new patient enrollees if they would like to be part of an anonymous virtual feedback group. Use this group to beta test and get monthly feedback on a small set of issues.	
	Consider ways to identify patients prior to their visit who fit in target or high value portal use categories. Consider putting the patient enrollment status on any pre-visit "huddle report" processes.	Example: Mrs. Smith has a virtual visit today at 2pm. She is a high volume caller to our clinic. Let's get the MA to help sign her up on the portal today to make it easier to respond to her high volume of questions.
	Consider ways homeless outreach can include helping the patient get onto the patient portal. Let that be a common way for homeless folks to still reach out to care teams.	Free phones? Help homeless put the MyChart app on their phone. Help homeless put a link to the web-landing page for MyChart on their phone's home screen? Show them how to send a message. Show them how to get med refills. Show them how to review their lab results.
	The frequent users of the patient portal are often those who the vendor, Epic, has targeted with their user platform. White, connected to the internet, knowledgeable about smartphones and PC use. How can AHS engage better with those who don't fit this demographic?	This is especially important given that the AHS demographic is overwhelmingly not Epic's target user.
	Study and become very familiar with the different barriers to tech connection within your population. Build strategies to support local CBOs who help connect patients to the internet.	Work with homeless shelters, domestic abuse shelters, libraries, care givers, promotoras and other community-based organizations and share marketing documents and links to patient portal enrollment and use information and videos. Work with free cell phone distribution points to encourage the use of patient portal on the smart phone. Have admin teams assist patients in putting the portal app or a link to the portal web on their smart phone home page.
	Other: please name	Please describe
10 Provider Staff Engagement and Feedback	Online survey providers and provider teams on their key likes and dislikes of the portal during COVID.	
	Ask staff who are also portal users/patients if they would like to be part of an anonymous virtual feedback group. Use this group to beta test and get monthly feedback on a small set of issues.	
	Create a competition for defined care areas based on monthly increase in enrollment or active use of the portal by patients and provider teams. If they grow by a certain %, they get a taco party or Starbucks card or cafeteria card.	
	Other: please name	Please describe

11 Marketing	Consider adding a marketing person to the portal team. They would help build marketing materials and help prioritize portal action items to build active use.	
	Consider adding a call center person to the patient portal team. The call center can create innovative approaches to connect callers to patient portal enrollment/password reset links/YouTube videos, etc.	
	Look at ways the patient portal users can be reached on a regular basis (monthly?) via email to share population health information - share patient portal use updates - share other?	This is a common use by Kaiser and the Veterans Administration and it helps keep patients active and informed.
	Consider alternative ways to best communicate the name for your patient portal.	How does the marketing on posters connect patients to the name of your portal? Does the smartphone landing page have a connection to login to the portal? What label is used on that connection?
	Put information out to call centers and in public facing posters that the portal saves calls to the clinic. Provide text links to enrollment, password reset, instructional videos.	Being on telephone hold is a well-known hassle. How can care teams promote the portal at these choke points? How can call center folks promote the portal for those who complain about being on hold?
	Other: please name	Please describe
12 Workflow	Have clinic workflow leader (nurse manager would set this up) to look at MyChart routing options - to determine the best way to triage e-mails to doctors who want to have their emails triaged.	Remember, the option to have a RN triage will have differing levels of acceptance depending on the type clinic (OB/GYN, peds, etc) and the provider (some like to get all messages directly and others do not).
	Create a set of common portal email answers and "dot phrases". Make it easy to find on the desktop. Put patient responses in multiple languages.	
	Build a common set of patient education materials to send to all patients who have a positive COVID test result.	Use the portal to help those patients with information on how to best quarantine, where to get resources while in isolation (like food) and who to keep in contact with via the portal with how they are feeling (should they come to the ER?)
	Use and promote the portal as a place to connect patients with SDOH needs to information on CBO resources.	
	Other: please name	Please describe