

Patient Portals: Playbook of Resources

Updated October 21, 2020

Patient Portal Engagement During COVID-19

- All documents courtesy Jim Meyers, DrPH jimmeyersdrph@gmail.com
- 10/21 webinar on *Patient Portal Engagement During COVID-19*: [SNI Link/Telehealth](#)

I. EXECUTIVE & PROJECT SUPPORT

- ***Patient Portal Deployment 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
- ***Moving the Needle on Active Patient Portal Use – A Celebration of Innovation in California’s Safety Net – Webinar Slide Set*** (Jim Meyers, DrPH) Slides detail a general background for optimizing patient portal enrollment and use and includes ten innovative best practices in patient portal redeployment actions by California Safety Net health organizations (.)
- ***Patient Portal Deployment 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 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 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
- ***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
- ***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
- ***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
- ***Sharing Ideas Webinar: Patient Portal Sustainment*** (The Colorado Health Foundation) Webinar featuring a presentation by a safety net’s CIO on sustaining constant improvement of a patient

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portal; additional presentation by a grantee cohort sharing on preparing for portal operations after grant funding

II. PATIENT ENGAGEMENT

- ***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 – 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
- ***Patient Portals: Patient Perspectives*** (California Healthcare Foundation) A three-minute video sharing patients’ perspectives about why they use portals: convenience, partnership, communication, access, and more

III. STAFF ENGAGEMENT & TRAINING

- ***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.
- ***MyWellness Competition Kickoff Video*** (LA DHS) One minute video for providers and staff to increase patient portal enrollment through supportive education, friendly competition, and incentives
- ***Patient Portal Online Satisfaction Survey - Staff Examples*** (High Plains Community Health Center) Example questionnaire to collect staff feedback about patient portals; English-only example
- ***Patient Portal Training Toolkit*** (LA DHS) Training materials for providers learning how to leverage MyWellness Portal including team preparation prior to patient enrollment, sample scripts, data tracking instructions, and more
- ***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
- ***Cerner HealthLife Portal Instructions on Setting Up Reminder Messages to Patients*** (GSK Open Source Guide) The Cerner HealthLife Portal provides multi-aspect features to enable patient interaction. The HealthLife Admin tool can be used by the practice IT team to configure rules based on criteria, which will send reminder messages to the patient via the HealthLife Portal.

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IV. COMPREHENSIVE METRICS

- ***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 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
- ***Patient Portal Tracking Reports*** (White Mountain Research Associates) Example patient portal reports used to measure portal enrollment and engagement across dozens of indicators

V. COVID-SPECIFIC 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.