Title: Getting Started Guide: The Role of Health Information Technology Staff in Patient Portal Deployment

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Context for Use: This article is a guide to the role of the health information technology staff in the deployment of a patient portal.

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The Role of Health Information Technology Staff. It is helpful to select a member of the health Information technology (HIT) staff to be part of the patient portal implementation team. The HIT staff member brings to the project expertise in the electronic health records (EHR) system and often a working relationship with the software vendor for the patient portal. The HIT department likely has experience managing projects with have a technology component, which will be a valuable asset to the portal team.

Choose a patient portal HIT champion who:
- Has experience working as part of multidisciplinary teams involving providers
- Can listen and communicate well with people from all clinic departments
- Is familiar with the EHR and portal system used by the clinic
- Has experience working collaboratively with HIT vendors

When getting started the health IT champion should take these key steps:

1. **Set appropriate expectations for the HIT role.** Patient portal implementation is fundamentally a clinical project, facilitated by HIT. Strategic decisions, including what features to implement and in what order should be made by the portal team, including clinicians, front-line staff, the executive sponsor and HIT staff. HIT staff bring competencies like project management, testing and training to help the team accomplish those strategic goals.
2. **Brief the team on the capabilities of your patient portal.** Each EHR and patient portal system have characteristics and capabilities that will influence how they are implemented. Present to the members of the portal team a briefing on the EHR, the portal system and the vendor. Provide the team with any background that could influence planning and execution of a patient portal implementation.
3. **Develop vendor resources and contacts.** Implementation of a patient portal requires tight coordination between the patient portal team and the portal vendor. Software updates and bug fixes, which will impact the features and functions within a portal system, can happen frequently. Work with your vendor to understand the nuances of how the portal performs, and elicit help from your vendor to resolve problems that come up during implementation. Nurture vendor relationships and, if needed, reach out to the members of your vendor's staff that have the expertise you need.
4. **Provide project management and HIT expertise to the planning process.** The patient portal project plan will cover a one-year period and include phased implementation of several features and functions. Each project task or activity should be described in detail in the project plan, and a timeline developed. The HIT champion can help with a realistic assessment of the time that should be assigned to each task.
5. **Prepare the portal team for implementation activities.** It is helpful for the portal team to know the processes followed by the HIT department in deploying new systems and modules as they plan the portal implementation. Being informed about implementation activities, from configuration to testing to documentation to process redesign, will help the portal team develop a better implementation plan and identify resources to move the project from the planning to the deployment phase.