



The Colorado Health Foundation™

Title: Getting Started Guide: The Role of Front Line Staff in Patient Portal Deployment

Author: Tom Dawson, Full Circle Projects, Jim Meyers, DrPH

Context for Use: This article is a guide to the role of front line staff in the deployment of a patient portal.

Permission to include this resource on this Patient Portal Knowledge Center has been obtained by the Colorado Health Foundation and is subject to the disclaimer written below.

The information set forth in this document should not be construed as legal or medical advice, a legal or medical opinion on specific facts or representative of the views of the Colorado Health Foundation, its directors, affiliates, agents or representatives unless so stated. This document is not intended as a definitive statement on the subject matter referenced herein. Rather, it is intended to serve as general information for readers, providing practical information for health care organizations seeking to implement and maintain patient portals.

By downloading, using or accessing this document, you agree to be bound by the Terms of Use set forth at <http://www.coloradohealth.org/terms-of-use> together with all agreements or instruments referenced therein.

Getting Started Guide: The Role of Front-Line Staff in Patient Portal Deployment

The Role of Front-Line Staff. A patient portal gives patients access to their health information and can provide efficiencies to clinics. Patient portals tie into your electronic health record (EHR) and are configured to give patients 24-hour access to health information such as after visit summaries, lab and diagnostic results, medications and immunizations. Patient portal features can include secure clinical messaging, appointments (view, notify, schedule or cancel) and access to a downloadable version of their health record.

Because front-line staff support patients through check-in, registration, scheduling and eligibility, they should be deeply involved in the patient portal implementation project. Select one or more members of the front-line staff (such as the clinic manager or a medical assistant) to be patient portal champions who will help carry out the implementation project.

Choose patient portal front-line staff champions who:

- Understand clinic culture, workflows and patient populations
- Are familiar with the EHR system
- Can effectively lead communications between front-line staff and the portal team
- Can communicate to patients the benefits of the patient portal

Key Steps: When getting started front-line staff champions should:

1. **Expose front-line staff to patient portal features and functions.** Offer demonstrations of your portal at department or team meetings to show how a portal can provide value for patients and clinic staff alike. Give front-line staff the opportunity to access the portal through a test account so they can see the system from a patient's perspective. If staff are also patients at the organization, encourage them to sign up and use the portal.
2. **Foster communications with colleagues.** A portal implementation will bring change. As new features and functions are implemented, workflows will need to be revised. Front-line staff champions take a key role in informing their peers about portal project activities. They also provide a conduit for ideas or concerns from front-line staff and the patients they serve. Make sure that front-line staff champions and their role in the project are known throughout the clinic.
3. **Share site-specific factors with the portal team.** One key role of front-line staff champions on the portal team is to represent their department and their clinic location on the portal team. Individual clinic sites can have different patient populations, services and operational realities. Portal team members are selected to represent both their departments and their clinic sites, informing them of issues that may have an impact on portal deployment.
4. **Prepare to communicate with patients about the project.** Front-line staff are a focal point for communications between patients and the clinic, and will take a key role in communicating the benefits of the portal to patients. Front-line staff should be prepared to articulate portal benefits, show a patient how to enroll, offer support in accessing their portal accounts and help them understand individual portal features and functions.
5. **Provide insights to guide patient portal marketing efforts.** Enrolling patients is an early focus of portal implementation projects, and marketing is used to encourage enrollment. Many patient portal marketing efforts take place in clinic public spaces, like waiting rooms or exam rooms. Front-line staff are aware of the locations within a

Getting Started Guide: The Role of Front-Line Staff in Patient Portal Deployment

clinic where marketing materials can be most effective, for example at blood draw stations, pharmacies or at the check-out station. Front-line staff and champions should evaluate their own clinic sites, identify marketing opportunities and pass the information to the portal team.