



The Colorado Health Foundation™

Title: Getting Started Guide: The Role of Providers and the Provider Champion 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 providers and the provider champion 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 Providers in Patient Portal Deployment

The Role of Providers and the Provider Champion. A patient portal can offer providers and their clinics a way to engage patients more in their own care. Patient portals tie into your electronic health record (EHR) and can be 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.

Providers are integral to the deployment of a patient portal, as the portal will require changes to some provider workflows. A provider champion will represent the needs and concerns of clinical staff on the patient portal team and will guide the clinical aspects of portal implementation.

Choose a provider champion who:

- Understands existing clinical workflows and provider concerns about portal deployment
- Communicates well with peers, executive leaders and clinic staff
- Has a strong understanding of health information technology (IT), EHR and patient portal functionalities
- Can make time available to participate fully in portal team and implementation activities

When getting started the provider champion should take these key steps:

1. **Engage providers in the portal project.** As with any major change in clinic workflows, there will be challenges. Provider engagement is critical to achieving a successful patient portal implementation. A positive word from their provider can be hugely influential in a patient's decision to enroll and use the patient portal. Clinic staff are also influenced by provider engagement. Encourage your provider champion to share patient portal benefits and success stories.
2. **Expose providers to patient portal functionalities.** Providers are more likely to be enthusiastic about a portal deployment if they see the opportunities for engagement with their patients and understand the value of the portal from their patients' perspective. Offer providers access to the portal from the perspective of a patient through presentations or by giving them access to a test patient account.
3. **Prioritize high-value features.** Provider engagement is earned when portal implementation solves existing problems or saves providers time. Implement portal features that simplify workflows and provide value to providers early in the project. Providers see lab results, prescription refills and patient education materials as features that streamline workflows and save time.
4. **Communicate positive impacts of the portal implementation to providers.** Providers with full schedules can see portal deployment as a burden. Share positive patient outcomes and metrics that demonstrate time savings and efficiencies.
5. **Respond to provider concerns.** Be open to provider concerns and address them quickly and honestly. Help them understand that new tasks that come with workflow changes actually make a given process more efficient and less time consuming. Conduct small-scale tests of new workflows with one or two providers, making tweaks as necessary. Share the results of successful tests with providers before rolling out the functionality more broadly.