

# HOW TO SUCCEED WITH ChartMaker® PatientPortal



5 Steps To Guide Your Office Implementation of  
ChartMaker® PatientPortal





# WHAT IS THE PATIENT PORTAL?

The ChartMaker® PatientPortal is an online service that allows a patient to keep track of their personal medical information. Likewise, it affords practices the ability to share and receive information easily with their patients. However, implementing your patient portal can be a daunting task for many offices particularly if you have a patient population that's less than willing to participate.

Gathering patient emails and encouraging them to effectively utilize their portal are just a few of the challenges that many offices encounter. However with proper communication and teamwork, any office can succeed with the PatientPortal.

One of those ChartMaker® PatientPortal success stories is Meetinghouse Family Physicians, a family practice made up of Dr. Sloan Robinson, Dr. Ronaldo de Guzman and Dr. Farah Roomi. With a busy family practice, their office came together to create an office strategy to achieve greater patient engagement on the portal. Some of the benefits they saw included a reduction in the time they spent on phone calls with their patients for questions such as labs results. And likewise, their patients noticed how much quicker they received access to things like their lab results and prescriptions refills.

Most importantly, their efforts helped to achieve better care management for their chronic care patients as the use of the PatientPortal helped facilitate proper follow-up in regards to their care plan.

So if you're struggling with patient portal engagement, follow these 5 steps below as championed by Meetinghouse Family Physicians to guide your office in the right direction:





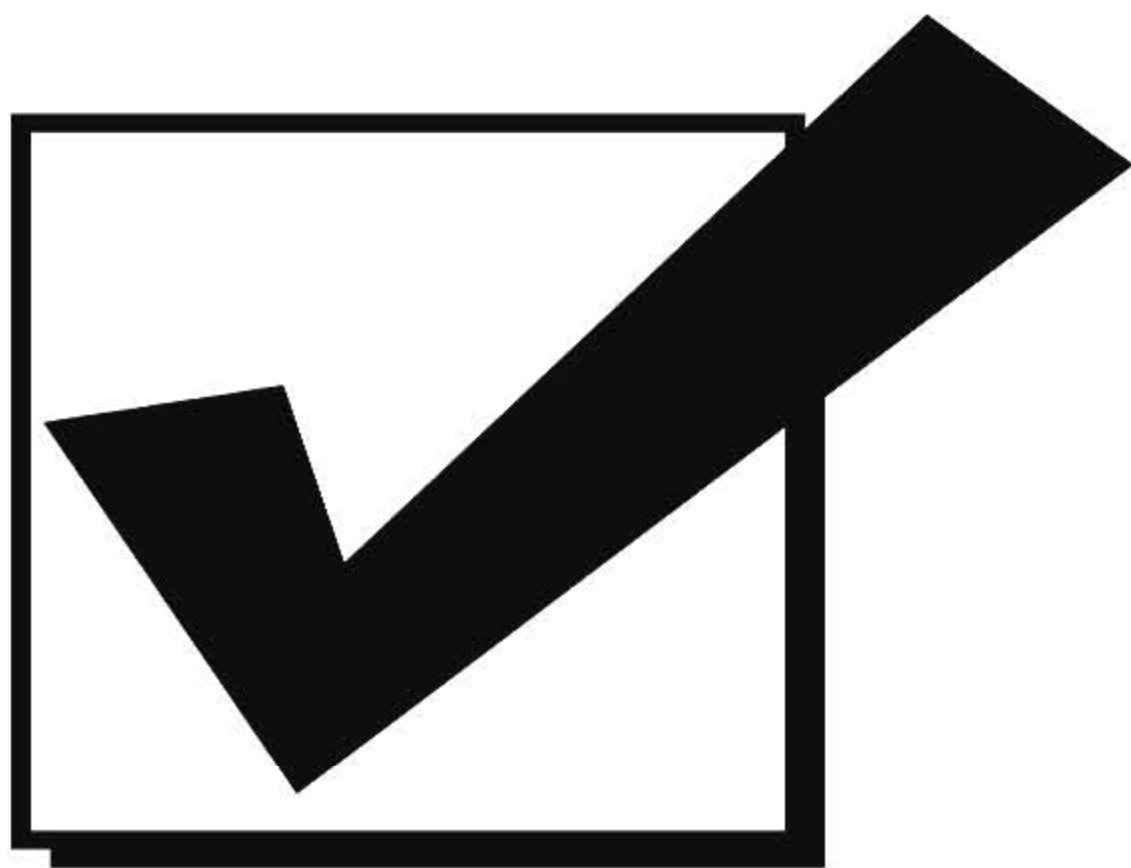
## #1 - Have a “Patient Portal Advocate(s)”

### Introducing Patients to the Portal

Whether it’s the front desk staff, medical assistant or the doctors themselves, make sure each patient is introduced or reminded about the benefits of the portal for their own personal health care each time they visit your office. Continually educating your patients on the benefits of the portal will make them more likely to participate and engage with you online. For example at Meetinghouse, Paula is the designated “Patient Portal Advocate” and is dedicated to introducing the portal to every patient and is also the point person for troubleshooting issues ( i.e. password resets, etc.).



## #2 - Set Up Your Patient Portal Distribution Lists



### Delegating with Distribution Lists

Karen, the office manager at Meetinghouse Family Physicians, agrees that when you delegate each distribution list to a specific person, it ensures that the correct messages are sent to the correct staff member. In addition, it ensures that each message is addressed in a timely manner.

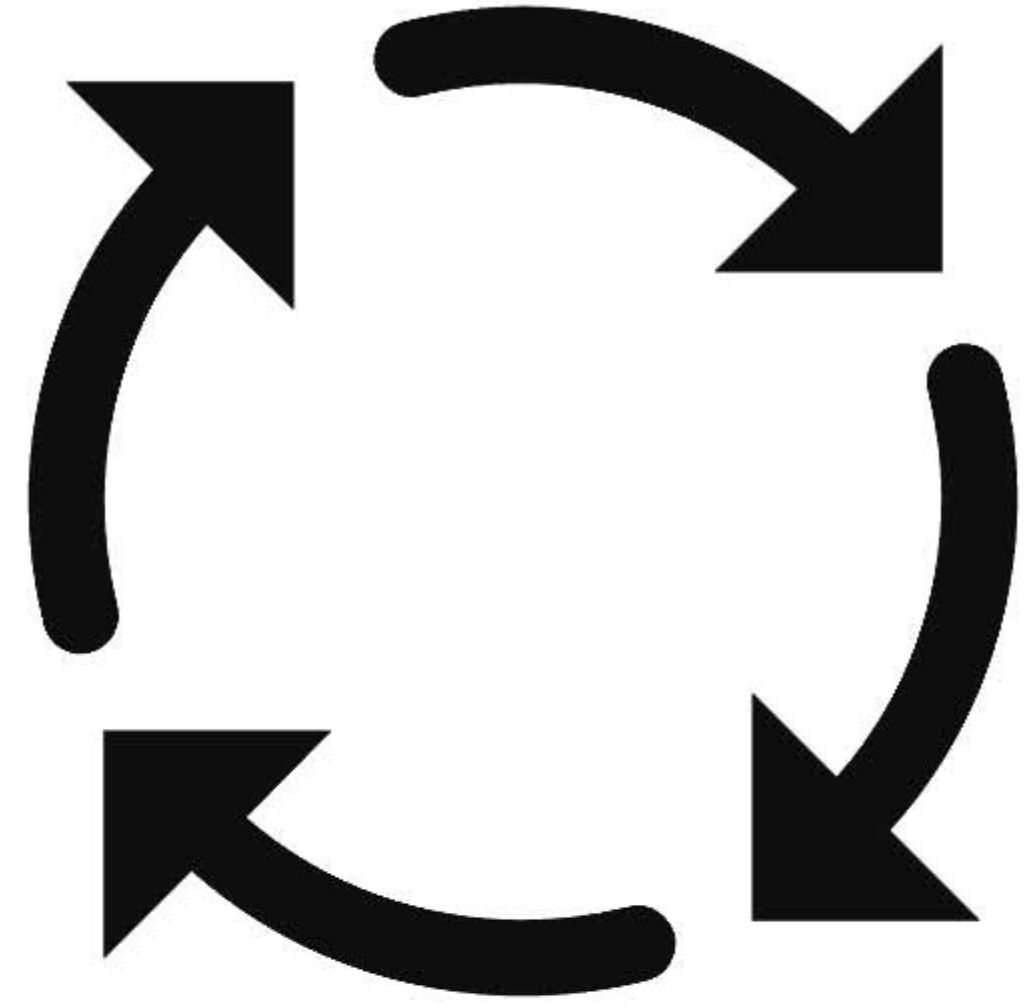




### #3 - Allow Yourself and Your Staff Enough Time to Get Adjusted to a New Workflow

#### Be Patient with the Process

Introducing the PatientPortal to your staff and patients will undoubtedly cause a change in workflow and typical duties for staff members. This may be hard to adjust to at first but keep in mind that with time and patience, things will fall into place as both you, your staff and your patients begin seeing the benefits of the PatientPortal.



### #4 - Have a Regular “Team Huddle”



#### Team Meetings Are Essential

Monthly meetings ensure that you and your team are on the same page. It allows for regular discussion of issues and/or new suggestions that can improve the workflow of your office. As for Meetinghouse, their monthly huddles also allow them to “check in” with one another to discuss various goals for the office in addition to their portal performance.

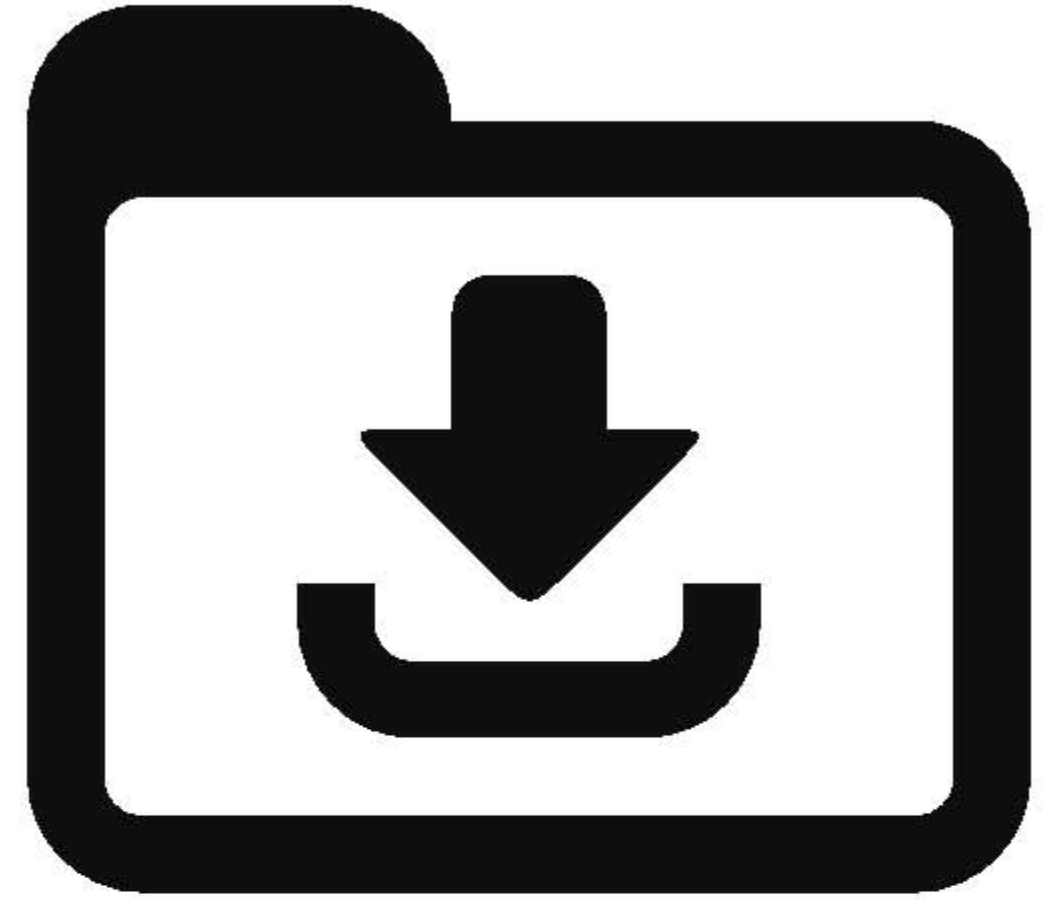




## #5 - Check With Your Vendor to Check for New Enhancements Regularly

### Stay Connected

As your vendor continues to provide updates and enhancements to the patient portal, stay connected with them to receive timely notifications of changes. In addition, this allows your practice the opportunity to provide feedback to them. As features are released, both you and your patient population will continue to see benefits that allow for greater management of care and coordination which is the ultimate goal of the portal.



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