



Patient Portal Work Plan

Work Plan Purpose and Instructions

This work plan has been designed and provided for you to outline key activities that are foundational to a new or existing patient portal. It is based on 16 common elements found when launching and operating a successful portal – elements that keep *successful patient engagement* foremost in mind. For grant participants that have an established patient portal, the work plan will document the existing operational structures and issues while providing a format for identifying and planning future improvement activities. This work plan was developed by Jim Meyers for use in CCI’s Spreading Solutions Program, funded by the Blue Shield of CA Foundation.

After completing this work plan, your organization should have a robust set of activities to move toward optimizing your portal.

Organization Information	
Organization Name:	Fill in
Overall Portal Success Team Leader:	Fill in
Overall Portal Success Clinical Leader:	Fill in
Overall Portal Success Support Staff Leader:	Fill in
Overall Portal Success IT Leader:	Fill in
Name of EHR vendor:	Fill in
Name of portal vendor:	Fill in
Describe the populations that will be served by the proposed work:	General Description of the Patient Population: Fill in % of Patients who prefer English as their primary language: Fill in % of Patients who prefer Spanish as their primary language: Fill in Please note if there are significant patients who chose another primary language: Fill in
Number of unduplicated patients seen annually by your clinic (including all locations):	Fill in
Please estimate the total number of unduplicated patients who will have online access to their health information through the patient portal by the end of the grant period:	Fill in



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Organization Information	
Please estimate the total number of unduplicated patients who will have viewed their health information online by the end of the grant period:	Fill in



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Work Plan Element One – Organizational Portal Strategy	
<p>Description: A sustainable organizational strategy for patient portal deployment, operation, and optimization is a key patient portal success factor. An effective strategy will include clearly articulated vision, accountable and monitored goals/objectives and action plans that are supported by leadership and widely communicated within the organization.</p>	
<p>Document an organizational vision statement for your patient portal one-year from the beginning of this project. Include in this vision statement your target market(s), features and functions that will be offered, and anticipated outcomes for users.</p>	<p>[Example Aim Statement: The Best Care Clinic will improve active use of the patient portal by our patient population to over 5% by August 2016. The portal will allow patients to: electronically communicate with their provider, request an appointment, request a medication refill, download a care summary and see lab results by August 2016. The increased use of the patient portal will improve access, enhance quality and increase patient engagement in their own health.]</p> <p>Fill in</p>
<p>Describe at least two major organizational motivations that drive your patient portal implementation:</p>	<p>Fill in</p>
<p>Describe the top three barriers or challenges that are most likely to limit your organization from achieving optimal patient engagement through the implementation or optimization of your patient portal:</p>	<p>Fill in</p>

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Element 1 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> Prepare and organizational vision for patient portal activities under the grant List major motivations for having an optimized portal List the top barriers/challenges expected in optimizing the patient portal. Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> Prepare a short report for senior leaders outlining the grant vision, motivations, expected key barriers to overcome, team members and basic plan for team meetings/operations. Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Two – Patient Portal Team

Description: A strong patient portal operations team has shown to be an effective way of launching and achieving optimal operational success with a patient portal. Effective teams often have the following attributes: regular meetings, strong senior leadership, accountability, stakeholder champions, representation across all portal touch points and meaningful feedback methods (performance measures/dashboard) for all of the major elements of portal operations.

Element 2 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> Identify key team members responsible for overall portal success, leadership of clinical issues, staff support and IT issues that arise. Identify a standard monthly meeting time. Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> Build an agenda and a set of patient portal tracking measures to be reviewed at the monthly meeting. Identify the key touch points – the people that interact with patients – and make sure they are represented on the portal success team. Add more... 	Jane Doe, IT Project Manager	Sept–Oct 2015	Put in the current status	

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Work Plan Element Three – Launch (or Re-launch) Plan	
<p>Description: The launch (or re-launch) plan for a patient portal significantly impacts all of the other operational elements. This plan must address two specific groups of people – the “go live” plan for the providers/staff and the “go live” plan for patient and family users. For both groups, this plan can vary widely from “going live” to just a few test users first to opening the portal up to all from the very first day. NOTE: if your organization has already completely opened the portal to all providers/staff and all patients/families, please describe the plan used when your organization went live in the first box. The other boxes may be left empty.</p>	
What is/was your plan for going live with your clinics?	Fill in
What is/was your plan for going live with your providers?	Fill in
What is/was your plan for going live with your patients?	Fill in

Element 3 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Develop a launch/relaunch plan for clinics, providers and patient populations. • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Launch/relaunch to a set of pilot users. Survey for satisfaction. Resolve issues. • Launch to all clinics, providers and patients. • Add more... 	Jane Doe, IT Project Manager	Sept–Oct 2015	Put in the current status	

Work Plan Element Four – Interoperability
Description: Interoperability refers to the degree that existing EHR and, as may occur, stand alone digital information systems (appointment system, health information links, business systems, etc.), work seamlessly with the operational requirements of the patient portal.

Element 4 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> Work with vendor to insure all portal features are tested and work seamlessly with the EMR. Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> Identify and test all system mapping to insure all systems that interface with the portal are working properly. Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Five – Enrollment and Password Reset

Description: Enrollment and continued patient portal use is often closely tied to the usability of or ease with which patients enroll, reset passwords, and then return to use the patient portal. The easier you make it, the more the patient will want to use the portal again.

Element 5 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Produce easy-to-understand written material on how to enroll and to reset passwords on the patient portal. • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Produce short non-commercial videos on how to enroll and reset passwords. Put a link on the sign-in page to these documents. • Text patients a link to these documents when they call in for help. • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Six – Patient Portal Features and Functions

Description: Patient portals can offer users multiple features and functions. These often include, but are not limited to, obtaining electronic copies of records, communicating with providers of care, checking test results, making and checking appointments, etc. The timing of the availability of each feature should be carefully planned, marketed (to providers and patients) and monitored to be sure the feature enhances patient engagement and overall quality of care.

Element 6 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Determine what portal features will be turned on and when. • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Test each feature prior to going live. • Monitor the use (page hits for each feature). • Ensure workflows are in place to quickly respond to the use of a portal feature (at least within 24 hours). • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Seven – Support Plan

Description: Operations support personnel and resources for patient portal operations include: support for providers of care, support teams, patients and their support family. Address support personnel and resources planned for prior to a launch, during the initial phases of operations, and through continuous operations. This includes personnel hours and planned resources specific to portal operations support.

Element 7 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Identify staff support needs for portal support activities: <ul style="list-style-type: none"> • Prior to launch (or re-launch): • During initial operations: • Additional ongoing or one-time continuous operations support: • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Identify a patient portal coordinator position. • Identify a patient portal navigator position(s) • Identify patient portal support staff for training, marketing, help desk, etc. • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

Work Plan Element Eight –Training Plan

Description: Training for patient portal operations includes providers of care, support teams, patients and their support family. Plans should include training prior to a launch, during the initial phases of operations, and through continuous operations.

Element 8 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Identify provider/staff training needs for portal activities: <ul style="list-style-type: none"> • Prior to launch (or re-launch): • During initial operations: • Additional ongoing or one-time continuous operations support: • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Train providers, staff and patients on how to use portal features prior to launching. • Provide “just-in-time” training videos and documents to provider/staff/patients for common retraining needs. Put on the intranet. Provide links via YouTube for patients. Include easy-to-follow screen shots. • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Nine – Patient Engagement and Feedback

Description: Feedback from patients is essential to knowing how your portal is used and why (or why not) users are getting optimal use and to ensure that the needs, desires, and preferences of your patients are understood. This includes just-in-time feedback, ad hoc, and regularly scheduled feedback processes. Feedback can be captured in electronic, paper-based, quantitative and qualitative formats. The engagement and feedback loop must also include timely review and corrective actions taken based on the feedback.

Element 9 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Identify at least one method for collecting patient portal user feedback from patients <ul style="list-style-type: none"> • During testing • During initial operations • During ongoing operations • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Start a virtual patient feedback group – ask new enrollees if they would like to participate in monthly virtual surveys. • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

Work Plan Element Ten – Provider / Care Team / Staff Engagement and Feedback

Description: Internal provider and staff feedback is essential to know how your portal is used and why (or why not) users are getting optimal use. This includes just-in-time feedback, ad hoc, and regularly scheduled feedback processes. The engagement and feedback loop must also include timely review and corrective actions taken based on the feedback.

Element 10 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> Identify at least one method for collecting patient portal user feedback from staff/providers <ul style="list-style-type: none"> During testing During initial operations During ongoing operations Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> Start a virtual staff/provider feedback group – ask super users if they would like to participate in monthly virtual surveys. Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Eleven – Marketing Plans

Description: Marketing plans can help target limited resources to fund communication to portal users on how to use and benefit from the patient portal. Provider, staff and patient-focused marketing are important and should focus on key touch points – the physical and virtual places users can learn about the portal - for each user. The plan should address pre-launch, launch and continuous operations.

Element 11 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Identify a central marketing theme for the patient portal • Rename the portal something other than patient portal • Identify the key marketing products to be used for providers, staff and patients for each of the following: <ul style="list-style-type: none"> • Pre-launch • During initial operations • During ongoing ops • Before and after introducing a new feature or software version. • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Use the provided marketing plan template to complete a full patient portal operations marketing plan • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Twelve – Work Flows

Description: The strength of patient portal operations is often only as strong as the weakest link in the workflow of each input and output task that comes from the use of the portal. Workflow mapping for each input and output – for those on the pathway of patient care (example: how do we process patient online e-mail to their provider) and for the patient using the patient portal online (how do I use the portal to get an appointment) – should be reviewed through a step-by-step mapping process. This important activity often highlights the simple connections to existing workflows, highlights the value of the portal (more portal e-mail means less telephone call-backing) and avoids unnecessary or repetitive work actions.

Element 12 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> Identify a simple method for conducting work flow reviews related to patient portal operations. Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> Conduct work flow review for all tasks that flow from each patient portal feature. Add more... 	Jane Doe, IT Project Manager	Sept–Oct 2015	Put in the current status	

Work Plan Element Thirteen – Risk Mitigation

Description: Patient portal operations can increase risk to patients. Risk mitigation should address, at minimum:

- the avoidance of portal use for emergencies
- identification of and operations during portal down time
- identification of and operations during clinic electrical and/or computer down time

Element 13 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> - Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Complete an analysis of: <ul style="list-style-type: none"> ○ the avoidance of portal use for emergencies (does your portal start with a warning to not use in case of emergency?) ○ identification of and operations during portal down time ○ identification of and operations during clinic electrical and/or computer down time • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	

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Work Plan Element Fourteen – Minor Users	
<p>Description: Federal and State law limits the sharing of health information regarding minors. It is important to operate a patient portal in compliance with applicable laws. Teens are also a perfect target group to engage their health through portal use. Clinics are encourage to work with vendors to comply with the law but optimize patient engagement with teens through the use of the patient portal.</p>	
Current state- document the current state of how patients between the ages of 12 and 18 are accounted for in patient portal planning or implementation:	Fill in
Future state- document the desired future state of patient portal implementation for patients between the ages of 12 and 18 after the year long duration of the project:	Fill in

Element 14 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> - Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> - Add more... 	Jane Doe, IT Project Manager	Sept–Oct 2015	Put in the current status	



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Work Plan Element Fifteen – Mobile Features and Functions	
<p>Description: Thanks to recent improvements in patient portal technology, patient engagement can be enhanced through mobile communications options. These emerging capabilities are important to consider in reaching many members of our underserved communities. This includes both mobile-enhanced patient portal connecting and text/SMS communications options.</p>	
<p>Current state- document the current state of patient portal planning or implementation to support SMS/text devices or smart phones:</p>	
<p>Future state- document the desired future state of SMS/text and/or smart phone functionality in patient portal implementation after the year long duration of the project:</p>	

Element 15 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	



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Work Plan Element Sixteen – Non-English Language Options	
<p>Description: Many of the populations served in your safety net clinic have limited English language proficiency. Providing communications options would improve patient engagement for these patients and their family members.</p>	
<p>Current state- document the current state of your non-English language vendor options for patient portal operations:</p>	
<p>Future state- document your vendor’s planned future state of non-English language options for patient portal operations at the end of the project year:</p>	

Element 16 Activities	Responsible Person	Timeframe	Project Start-up Status	Mid-project/Final Status Update
<p>Completed Activities</p> <ul style="list-style-type: none"> • Add more... <p>Planned Activities</p> <ul style="list-style-type: none"> • Add more... 	<p>Jane Doe, IT Project Manager</p>	<p>Sept–Oct 2015</p>	<p>Put in the current status</p>	