

### Customize Your Patient Portal

- **Tech Support:** Every portal is different. If you are not sure what features are currently enabled, contact your EHR vendor and request a consultation. Your vendor can explain your portal's features and help you turn them on/off according to your preferences. Make sure all staff are familiar with the portal's functionalities.
- **Useful Features:** By enabling features such as appointment requests and prescription refills, you can reduce the amount of incoming phone calls to the front desk. The provider can quickly approve prescription refill requests through the portal.

### Learn Your Patient Portal Invitation Process

- **Test Account:** Create a portal account for yourself so you can understand its features and invitation process. Knowing the invitation process will help you teach your patients how to access the portal.
- **Email Invitation:** If patients are invited by email, customize the automated email notifications. The email should have the practice and provider name in the subject line to help patients identify and open emails from your practice.

### Involve Patients' Caregivers

- **Setting up an email address:** Ask the patient if they have a family member (child, spouse, parent, etc.) whose email could be used for their portal account. Alternatively, work with the patient in the office to set up a free email account.
- **Caregiver access:** Direct the patient's caregiver to use the portal to keep track of medication list, labs, diagnosis, etc.
- **Caseworker access:** Notify patients with social workers or caseworkers that they can use a caseworker's email address for the portal account instead of their own. Some EHRs allow one email address to be connected to multiple patients; ask your vendor if your system has this capability.

### Activate the Patient Portal in the Office

- **During wait times:** Dedicate staff to train patients to use the patient portal. Have patients log into the portal while in the waiting room. If your portal is mobile-friendly, encourage patients to log in using their mobile phones. If the patient is waiting in the exam room, the Medical Assistant can demonstrate how to use the portal.
- **At check-out:** Have front desk staff guide patients through the portal activation process before leaving the office. Staff should print out the patient's login credentials for them.
- **NOTE:** If your patient portal is only in English and cannot be translated into another language, be sure to notify non-English speaking patients and help them to use the portal while in the office.

### Talk to Your Patients about Patient Portal Benefits

- Explain the benefits of being able to access health records online, including having all their medications and diagnosis information in one place.
- Remind patients that it is for non-urgent use only.
- Emphasize ease of use: "Signing up for the portal gives you direct access to me. You can message me directly and I can respond to you directly."
- Remind patients that caregivers can access the portal to coordinate appointments, tests, refill medications, and review general care plans.