Example Quarterly Patient Portal Senior Leader Report

The attached is an example of a report provided quarterly to senior leaders on patient portal operations. The author has given permission to share broadly without restrictions except as noted below.

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For further information about this resource please feel free to contact Jim Meyers, DrPH at jimmeyersdrph@gmail.com or 510-761-1609.

Patient Portal Quarterly Tracking

Clinic Name
Data Collection Date
Quarter Covered

METRIC	VALUE	DEFINITION
Patient Enrollment and Portal Use		
Total Patient Population *(from grant agreement)*		Total number of unduplicated patients who receive services at your clinic
Target Number of Patients Using Portal *(from grant agreement)*		Your identified goal for the number of unduplicated patients who will view, download, or transmit to a third party their health information using the patient portal *over the grant period*
Cumulative Number of Patients Enrolled to Date		Running total of the number of unduplicated patients enrolled/registered to use the portal (cummulative)
Cumulative Number of Patients who Have Used the Portal to Date		Running total of the number of unduplicated patients who have viewed, downloaded, or transmitted to a third party their health information using the portal (cummulative)
Population Penetration		
Average Number of Times Logged into Portal		Average number of times patients have logged into the portal *this quarter*
Patient Portal Services Used		
Number of Emails Sent to Providers		Total number of emails sent to providers from the portal *this quarter* (Report only if it is easily feasible with your portal system. If your system does not track this figure, leave blank.)
Number of Times Lab Test Results Viewed		Total number of times lab results were viewed in the portal *this quarter* (Report only if it is easily feasible with your portal system. If your system does not track this figure, leave blank.)
Number of Appointment Transactions		Total number of appointments made via the portal *this quarter* (Report only if it is easily feasible with your portal system. If your system does not track this figure, leave blank.)
Number of Medication Refill Requests		Total number of refill requests made via the portal *this quarter* (Report only if it is easily feasible with your portal system. If your system does not track this figure, leave blank.)
Other Measures		
Number of Visits to Portal Site		Number of hits to patient portal site *this quarter*
Average Length of Time (in Minutes) Spent on Portal Site Per Visit		Average time spent on the portal site *this quarter*
Number of Hits to Popular Links on Portal Site		Identify top five links each quarter and document the number of hits to each link
Login		
Appointments		
Lab Results		
Message		
Download Record		