Patient Portal Workplan Tracking Form Example

The attached is an example of a report used to summarize the current status of all of the activities in a patient portal team's deployment/redeployment workplan.

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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.

Note: the workplan shown below was developed from tasks outlined in a specific clinic's grant-required workplan. Your activities may vary significantly. This is being shared as an example format.

Patient Portal Operations Workplan

			First 6 Months		Second 6 Months	
Example Major Work Area	**EXAMPLE Activity**	Point of Contact	**Status**	**Comments**	**Status**	**Comments**
1. Convene Patient Portal Project Team on a monthly basis						
	a. Meet Monthly with at least team, clinical, ops and IT portal project leaders in attendance.			example colors		
	b. Select Key Team Members					
	b. 1. Portal Overall Team Leader					
	b. 2. Portal Clinical Leader					
	b. 3. Portal Staff Support Leader					
	b. 4. Portal IT/IS Support Leader					
	c. Review Portal Use Data from Vendor at each meeting					
2. Completed required grant evaluation documents on time						
	a. Updated team member contact list sent to funder					
	b. Quarterly evaluation forms completed					
3. Develop job descriptions for Patient Portal Project Manager and Portal Engagement Specialists, post positions, interview, hire	**a. Create job description for patient portal navigators**					
	Interview / Hire					
	Intern recruiting					
4. Develop portal quality assurance checklists - staff	**a. Conduct quality audits on various features of the portal and features**					
5. Develop Workflows to each Portal Application						
	Secure Messaging					
	Help Forms					
	Questions					
	Scheduling					
6. Creation of portal navigators						
	a. Determine job needed					
	b. Develop short video aids					
7. Access to outside resources that can help promote the patient portal with staff and patients						
	Review external Videos from Jim and modify for Eisner					
	Push Videos to YouTube after branding					
8. Purchase and use tablets in clinics to support patient engagement						
	a. Buy tablets					
	b. Load application function on tablets					
	c. Deploy securely to patients					

9. Production of marketing materials, including educational handouts and videos, in English and Spanish	**a) create handouts to be given to patients with instructions how to register and technical questions.**					
	b) Production of posters for waiting area in colloboration with marketing department					
	c) Create a FAQ doc for patients to refer to with questions when using the portal.					
10. Set up feedback stations--boxes, paper, pens for forms and surveys	**a) Create patient portal surveys to be completed by providers and staff. The survey will be conducted monthly**					
11. Develop language for banners for risk mitigation	**a) Have verbage assigned to risk mitigation**					
12. Develop staff protocols for technical problems and emergencies	**a) Staff to send email to IT helpdeks when the portal is down**					
13. Patient access to portal for minors						
	a. Develop Policies and Procedures					
14. Spanish Version of Portal						
	a. Develop Policies and Procedures					
	b. Translations services needed?					