

# InteliChart Patient Portal Best Practice Guide

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## Key Features

1. Requesting appointments online
2. Requesting medication refills online
3. Appointment reminders sent via email and phone
4. Secure communication between patients and providers
5. Patient forms, such as mandatory screenings and assessments
6. Lab results posted in a timely manner, ability to filter lab results
7. Automated portal enrollment invitation sent via email and phone
8. Robust management portal for messaging and reporting

## Best Practices

1. Designate a team to manage the portal and set up user accounts in the management portal. Assign staff who will be responsible for:
  - a. Enrolling patients into the portal
  - b. Sending messages through the portal
  - c. Responding to appointment requests from the portal
  - d. Receiving messages by type from the portal
  - e. Reviewing and pushing labs to the portal
  - f. Sending additional documents to the portal
2. Include all providers in portal, even if they will not be receiving direct messages.
  - a. Best Practice Tip: designate another member of the care team to review and respond to portal messages, consult providers when necessary.
3. Review and edit all preset portal messages to be sent via email and text.



4. Set up NextGen portal task groups and set up all message routing to task groups.
  - a. Best Practice Tip: practice should respond to all messages within 24-48 hours of receiving the message.
5. Define which labs will be automatically shared or not shared to the portal.
  - a. Best Practice Tip: all labs should be considered to automatically share via the portal unless defined by the health center as an exception, or in compliance of CA health privacy laws (e.g., positive HIV labs)
  - b. Best Practice Tip: document protocols for sharing and responding to requests for information in a policies and procedures document.
6. Collect email addresses for current and new portal users.
  - a. Best Practice Tip: run reports on current portal users with an email.
  - b. Best Practice Tip: collect new or updated emails at the time of visit, target initial enrollment to patients with an email.
7. Enable automated enrollment for patients for patients to register without staff involvement.
  - a. Best Practice Tip: follow-up with patients after they receive portal invites to ensure they complete registration.
8. Create messaging and marketing materials around new portal enrollment.
  - a. Best Practice Tip: cobranding is key to let patients know that Intelichart is associated with your practice.
9. Train front office staff (or designated staff) to enroll patients at the time of visit.
  - a. Best Practice Tip: encourage patients to sign up for the portal while they are waiting to be seen (results in greater patient satisfaction)
10. Measure success by sharing regular reports on enrollment, most used features, or other feedback from patients.
  - a. Best Practice Tip: consider implementing a patient satisfaction survey or add a question(s) about the portal in an existing patient survey (e.g., post-visit survey).

## Lessons Learned from Partner Health Centers:<sup>1</sup>

1. **Discuss roles and responsibilities BEFORE launch.** Document clear expectations for staff responsible for responding to messages, or guidelines for sending labs and other health information to the portal.
2. **Develop marketing campaigns** and present INTERNALLY to staff and providers in order to gain buy-in and understanding. Explain the benefits of using the portal and its features so all staff can play a part in referring patients.
3. **Obtain provider buy-in!** Consistent and frequent messaging to providers on the benefits to patients is important to the portal launch and ongoing enrollment.
4. **Test default IntelliChart configurations** in development/testbed environment after updating NextGen and before rolling out portal to production to identify potential issues (broken setting, mapping issues) before going live.
5. **Send out a portal invite to every patient after every visit** if they are not already enrolled. Consider using Portal Ambassadors to help enroll patients onsite and troubleshoot portal and technology issues.

## Talking Points to Patients and Staff:

1. What are the benefits of using the patient portal for patients?
  - a. The portal offers patients personal and secure access to parts of their health information, making it easier for them to take charge of their own health and healthcare.

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<sup>1</sup> Based on feedback gathered from Parktree Community Health Center, Northeast Valley Health Corporation, and Asian Pacific Health Care Venture, Inc.



- b. The portal connects patients directly to their provider and care team, allowing them to check their appointments, ask non-urgent medical questions, and request appointments.
    - c. The portal reduces time spent waiting on the phone to ask questions of health center staff and eliminates potential for missed communication and undocumented follow-up.
  2. What has been done to protect patients' medical information in the patient portal?
    - a. Patient health information is safe from unauthorized access because the patient portal is password-protected and delivered via an encrypted connection.
    - b. The same laws that protect privacy with paper charts, and other electronic systems, apply to the portal.