

CHECKLIST

Marketing the New Patient Portal

Get your practice and patients prepared to optimize the New NextGen® Patient Portal—the foundation of the NextGen® Patient Experience Platform

Get the word out

Step 1: Announce the new patient portal

Prior to upgrading to the new patient portal, we recommend you create a communication plan to prepare your patients.

Recommended timeframe: one month before going live

- ✓ Build a patient portal landing page on your practice website to house any patient portal information
Link from your homepage and include these resources:
 - Patient Portal [brochure](#) (personalized brand version available)*
 - Patient Portal Explainer [video](#)
 - [Patient FAQs](#)
- ✓ Create an announcement on the homepage of your practice website and link to landing page mentioned above
- ✓ Develop an email plan to inform patients that the new portal is coming — see [email template](#)
- ✓ Create an “announcement” on your legacy portal (if you have one) to inform your patients of the new portal
 - Example: Starting [insert date], [Insert practice/provider name] will offer a new patient portal. Keep an eye on your email inbox for more information.
- ✓ Audit patient emails on file and prepare staff to collect/confirm emails for invitation to enroll
- ✓ Use Facebook, Instagram, and LinkedIn accounts (if you have them) to announce the new patient portal

Step 2: Communicate with your patients post go-live

Once you have upgraded to the new patient portal, it's important to educate your patients and keep them engaged to maximize portal use.

Recommended timeframe: Post go-live

- ✓ Add links to the services offered through the patient portal from your website's homepage
 - Examples: Patient Portal | View your health records | Ask a question | Request an appointment
- ✓ Develop an email plan to inform patients on how to enroll—see [email template](#)
- ✓ Use your practice's Facebook, Instagram, and LinkedIn accounts to promote enrollment in the new patient portal
- ✓ If your practice regularly texts patients, let them know that the new patient portal is live
 - Example: We're live! [Insert practice/provider name] now offers a new patient portal so you can easily connect with your provider and view healthcare information through your mobile device or computer. Learn more: [insert practice URL]
 - Example: You've been invited to enroll in our new patient portal. You should've received an email to enroll. If you have not received an email, give us a call [insert practice phone number].

* Customizable Brochure and Poster Options

Visit the [print-on-demand site](#) for printing requests or digital downloads. Both require a small fee, but the digital version is free with any print order. For questions, refer to the [Print On-Demand FAQ](#).



Set your *practice* up for success

Be prepared to assist your patients during the pre and post go-live stages:

- Plan how you would like patients to request an account. Do you want them to call or fill out a webform on your practice website?
- Create a messaging script to help you communicate consistently with each patient
- Become familiar with the [Success Community](#) and how to open a support ticket (To learn more about the Success Community, visit [Pathway](#))
- Watch the [Patient Journey Demo](#)
- Print and display the [patient brochure](#) and [poster](#) in your clinic(s)*

Work with your NextGen Healthcare representatives to ensure you maximize your practice's customization/configuration of your patient portal that includes:

- Practice name, color theme, and logo
- Customized email templates
- Welcome message
- Practice information located on the footer of the portal
 - Social media links
 - Main contact information
 - Reference links (e.g [Patient FAQs](#))
- Patient portal broadcast message
- Solutions offered
 - Customized solution instruction messages
 - Customized thank you message
- If your practice website has a link for patients to self-register to the legacy portal or a third-party portal, you will need to remove the link. The new patient portal does not currently support patient self-registration.

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Contact your NextGen Account Executive for more information.