

# PATIENT PORTAL CHECKLIST

***Are you missing out on patient engagement tools your organization already owns within your MEDITECH system?***

Use this checklist to quickly assess areas for improving patient engagement and efficiency through the MEDITECH Patient and Consumer Health Portal.

## **My organization's MEDITECH team has completed or is able to:**

- Set up proxy and shared user accounts.
- Manage and consume EMR information sent from the portal.
- Manage basic or integrated remote monitoring via the portal, and integrate with our care plans.
- Set up notifications on tracker and status boards that show when data from the portal is available.
- Generate administrative reports to show patient enrollment and what/where they are logging into.
- Create and manage internal portal users.
- Adjust the color and display settings of the portal to align with organization's branding.
- Customize content parameters to reflect policies and information specific to my organization.
- Send automatic portal invitations to new patients.\*
- Send mass emails to portal users.\*

## **My patient population is able to:**

- Send messages to their care team.
- Request prescription refills.
- Schedule appointments.
- Send scanned images to their care team via the portal.
- Send their health information to other providers assisting with their care.
- Set up shared access to their information allowing family members to assist in their care decisions.
- Update their demographic and contact information in their patient profile.
- Access their reports such as radiology in pdf format.
- Access their test results for lab, microbiology, and pathology and graph trends.
- View their bills online or find the link to an external billing site.\*
- View history and trends of tracked health measures.\*
- Use the MHealthApp for mobile portal functionality.\*
- Complete pre-registration, consent forms, and check-in prior to arriving for their appointment.\*
- Complete questionnaires such as medical history, mammography, and family health history.\*
- Access the portal in Spanish and English as well as other languages.
- Set up appointments, and attend via virtual visits -- even if they've not had a visit with the facility previously.

*\*new enhancement functionality*

### **DOES YOUR ORGANIZATION HAVE A PATIENT PORTAL ROADMAP?**

Ensure your organization isn't missing out on owned functionality. Get help from our CereCore MEDITECH-Ready experts on a Patient Portal Assessment. We have partnered with hospital technology leaders across the country to assess portal environments, correct errors along the way, highlight opportunities for improvement, and where functionality is underutilized. The result is a roadmap that uses the portal to gain efficiencies and improve patient engagement. What's more, a typical assessment is accomplished in 5-6 days of consulting services and is a minimal investment.