The Colorado Health Foundation™

Title: Getting Started Guide: The Role of the Portal Team in Patient Portal Deployment

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Context for Use: This article is a guide to the role of the portal team in the deployment of a patient portal.

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The Role of the Portal Team: The executive sponsor, a member of the clinic's executive team, selects appropriate staff to join the portal team, which will manage a year-long focused patient portal deployment or re-launch project. The executive sponsor is also a member of the portal team, acting as a two-way conduit of information from the portal team to the executive team. The project manager leads the day-to-day operations of the portal team, coordinating the activities documented in the project plan. The remainder of the team members should come from the departments most directly affected by portal deployment.

Choose portal team members who:
- Represent their department or clinic location, bringing knowledge of operations and workflows
- Can make time for portal team meetings, tasks and activities throughout the project
- See the value of the patient portal to both patients and staff
- Can facilitate communication between the portal team and their department or location

When getting started the portal team should take these key steps:

1. **Select the multidisciplinary patient portal team.** The executive sponsor selects the patient portal team members who meet regularly throughout the duration of the project. A project manager will manage the project on a day-to-day basis. Departments most directly affected by portal deployment contribute a member or members to the team, including clinical, operations, front-line and health information technology (IT) staff. Begin with a year-long plan. Implementation can go longer if necessary.
2. **Write a project charter.** The project manager leads the development of a project charter, a document that details key elements that will guide execution of the project, including goals and objectives, team member roles and responsibilities, decision-making protocols and project timelines. The completed project charter, signed by the chief executive officer, sets expectations for the project across the organization and provides guidance to the project manager and the portal team as they execute the project.
3. **Develop a detailed one-year work plan.** The project manager works with the patient portal team to create a one-year work plan. The patient portal project consists of a collection of action items, some of which are quite involved and complex. Major tasks and activities are documented in the work plan, with detail that can include a description of the work, measurable goals, timelines, staffing and budgets. The information in the work plan gives the portal team and the people doing the work the criteria to use to determine if the project is on track. A work plan tracking spreadsheet can provide a living document to track in detail the individual action items over time.
4. **Set goals and benchmarks and track metrics.** The project manager builds goals and benchmarks for implementation and use of the portal into the work plan. Set goals based on each phase of the project. For example, at the beginning of the project, when the focus is on enrollment, look at metrics for enrolled patients and patients actively using the portal. Track metrics on impact measures such as reduced call volume. Compare these metrics to your goals to determine whether the project is on track. If goals are not being met, the portal team can hold staff accountable or make adjustments to the project plan. It will be useful to set

benchmarks for the use of each functionality as it is implemented and review them at each portal team meeting.

5. **Make changes to portal team membership as the project requires.** The size and membership of the portal team may change through the year-long project. Certain tasks and activities can dictate changes, for example adding clinicians during implementation of lab results or messaging could strengthen the project. Adding representatives from different clinic sites may pay dividends during a patient enrollment push. Marketing staff may be essential during the first six months of a portal project, but becomes less influential as the project goes on. While changes are to be expected, a balanced multidisciplinary portal team is always required.