Patient Engagement process – Demo and Training to increase portal use

**Phase:**

1. **Check in**
   - Inquire about portal access
   - Does the patient have portal access?
     - Yes: **Sign up for portal**
     - No: **Wait time**

2. **Wait time**
   - Recently used?
     - Yes: **Talk to patient about benefits of portal**
     - No: **Wait time**

3. **Talk to patient about benefits of portal**
   - Is it preferable for MD, NP, or PA to review benefits?
     - Yes: **Conduct portal demo with patient**
     - No: **End**

4. **Conduct portal demo with patient**
   - Go through portal demo with Admin
     - Recently used?
       - Yes: **Treat patient**
       - No: **End**
   - Recently used?
     - Yes: **Treat patient**
     - No: **End**

**Opportunity:**
- Is it preferable for MD, NP, or PA to review benefits?

**Activities:**
- Take vitals
- Visit details documented in EHR
- Vitals documented in EHR
- Visit details documented in EHR

**Locations:**
- Patient visit
- Clinical Admin
- Medical Assistant
- NP or MD
- EHR