Patient Engagement Process – Setting up Patient Portal access

**Clinical Team:** PCP, MA

**Office Assistant**

1. **Check in**
2. **Offer portal access to patient**
3. **Initiate portal set up**
4. **Provide access info to patient**
5. **Document patient decline in EHR**
6. **Vitals documented in EHR**
7. **Visit details documented in EHR**
8. **Complete patient check-out**

**EHR**

**Patient visit**

1. **Check in**
2. **Offer portal access to patient**
3. **Initiate portal set up**
4. **Provide access info to patient**
5. **Document patient decline in EHR**
6. **Vitals documented in EHR**
7. **Visit details documented in EHR**
8. **Complete patient check-out**

**Phase**

- **Yes**
  - Receive portal access info from office assistant
  - Go to exam
  - Conduct visit/examine patient

- **No**
  - Room patient and take vitals
  - Document patient decline in EHR
  - Vitals documented in EHR
  - Visit details documented in EHR
  - Complete patient check-out