Welcome Call

With the introduction of Patient Portal requirements in the CMS EHR Incentive Program, the successful implementation of NextGen Patient Portal has become an important undertaking. It will require preparation, testing, evaluating, training, and tweaking by designated staff members at your practice. NextGen and TSI Healthcare have spent many hours perfecting the process to ensure a successful transition. We are committed to assisting you through the project.

Training Process

<table>
<thead>
<tr>
<th>Session</th>
<th>Topics Covered</th>
<th>Suggested Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Welcome Call</td>
<td>Review training process, select team, discuss dates</td>
<td>Required: Practice Manager Optional: Patient Portal Team Lead</td>
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<tr>
<td>2. Demo Session</td>
<td>Webinar provides an overview of portal functionality, and sneak peek of what the users see from both a NextGen perspective and a patient perspective</td>
<td>Required: Practice Manager, Patient Portal Team Lead, and Core Group</td>
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<td>3. Configuration &amp; Admin Form</td>
<td>Online form designed to collect practice’s preferences regarding how the portal will be set-up</td>
<td>Required: Practice Manager, Patient Portal Team Lead, and Core Group</td>
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<td>4. Configuration Training</td>
<td>Review of initial set-up completed by TSI Healthcare, training on making changes, and additional configuration functionality</td>
<td>Required: Patient Portal Team Lead Optional: Practice Manager, Core Group</td>
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5. Complete Training

<table>
<thead>
<tr>
<th>Patient Portal Team Lead</th>
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<td>Required: Practice Manager, Patient Portal Team Lead, and Core Group</td>
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6. Testing

| Each team member will create/use a test patient to confirm functionality is working as expected. It will also allow super users to familiarize themselves with the Portal |
| Required: Practice Manager, Patient Portal Team Lead, and Core Group |

7. Complete Training or Recorded Session

| Detailed training of all portal functions from the EPM, EHR, and Patient View perspectives |
| Required: Patient Portal Team Lead, All Staff not on 1st Complete Training |

8. Patient Roll-out

| Selected day & week during which your practice will roll-out Patient Portal to patients |
| Required: All staff |

9. Post Go-Live Follow-Up

| Review progress, provide additional training as necessary, answer any questions that have arisen |
| Required: Practice Manager, Patient Portal Team Lead Optional: Core Group |

Selecting your Patient Portal Team

- **Client: Designate Your Patient Portal Team Lead.** This person will be responsible for performing all administrative/configuration tasks for your practice, including attending required training sessions, performing configuration and testing, and/or training the rest of your practice staff. They will be the go-to person when changes need to be made in the future.

  - Patient Portal Team Lead: ________________________________

- **Client: Designate your Core Group.** These staff members will represent the super-users among your practice staff. They will be responsible for attending a majority of the sessions, will receive training on the same information several times, will be responsible for completing testing, and will be the “cheerleaders” during our enrollment campaigns.

  - EPM Core Group: ________________________________
  - EHR Core Group: ________________________________
Review Training & Roll-out Expectations. The success of your patient portal is COMPLETELY correlated to your group’s dedication throughout the training process and most importantly encouraging patients to utilize the product. With that in mind, and based on our experience, we provide the following expectations which should be shared with your team:

- **Practice Expectations**
  - The practice must actively “push” portal utilization to encourage Patient adoption
  - Buy-in & excitement is the only way staff will be willing to “push” this product
  - Testing and understanding the functionality **outside of training** will be key
    - If they don’t understand how it works, they won’t be as comfortable suggesting it to the patients
  - “Marketing” your portal to patients will impact the adoption rates
- **TSI Healthcare Expectations**
  - We will provide you with the necessary training and follow-up to get your team comfortable with the portal
  - We will provide your practice with suggestions and tools to encourage patient adoption

Preparing for your Next Session

- **Register** for your Project Intro & Overview session and Complete Training sessions if not completed on Welcome call. You will receive a GoToMeeting invitation for your sessions, which will provide access to view the training webinars.
- **Download the Slides for each training session.** These slides can be used by your team to take notes during the session. Slides are available online at [www.tsihealthcare.com/mucentral](http://www.tsihealthcare.com/mucentral)
  - Password: success
Demonstration of Patient Portal

☐ Client (per practice preference): Download a copy of the Demo Training Slides. These slides can be used to take notes and as a reference when making decisions about your portal implementation. Slides are available online at Slides are available online at www.tsihealthcare.com/mucentral
  - Password: success

☐ Review Patient Portal Meaningful Use Objectives. There are three key MU objectives that impact your group’s deployment of Portal and should guide your group as you establish what goals you wish to accomplish by installing this product. We will cover these in-depth during the training. The overview of those objectives are:
  - Enrollment: 50% of patients seen must have electronic access to their health information.
  - View/Download Personal Health Record: 5% of patients seen must view or download a copy of their health record.
  - Send Messages: 5% of patients must send an electronic message to the practice.

☐ Complete a Demonstration of the Patient Portal. Our team will utilize a training checklist as a guide for our live demonstration featuring the functionality of the portal. During this session, practice staff should consider:
  - Functionality: Which features your group would like enabled/disabled
  - Workflow: The functions presented and how they will be implemented at their practice based on workflow
  - Staff: Which staff members will be responsible for each task
  - It is recommended that you take notes on these three pieces as we proceed through the demo to help you complete the Configuration & Set-Up form at the end of this session.

☐ Review Impact of Staff Participation on Patient Adoption.
Introduce Marketing Materials. To encourage patient adoption, TSI Healthcare has gathered a series of resources which can help increase the amount of patients that enroll in your portal. These marketing materials are available online at www.tsihealthcare.com/client-login.
  o User Name: tisclient
  o Password: tsihealthcare

Consider Enrollment Workflow. As part of your go-live, your team will set goals for patient enrollment rates. In order to accomplish these goals, your practice will want to establish a specific workflow for when during the patient’s visit they’ll be enrolled.
  o Check-In? Check-Out? New Patient Phone Calls?
  o Will you provide a laptop or tablet?
  o Will your staff walk the patient through the process?

Introduce the Configuration & Admin Form. We’ve developed this form to help our trainers provide you with a superior installation process. We will use this form to prepare for your one-on-one Configuration Training Session.
  o This form will take approximately 20 minutes to complete.
  o The more thoroughly the form is completed, the more functionality can be ready for our next session.

Schedule Remaining Training Sessions if not scheduled on Welcome Call.
  o www.tsihealthcare.com/mucentral
  o Password: success

Preparing for your Next Session

Complete the Configuration & Admin Form. This form should be completed after this session, if possible, with assistance of the team that viewed the demo. This form is necessary for our team to complete your system setup.
  o www.tsihealthcare.com/mucentral
  o Password: success

Review the Marketing Materials. Your practice should begin establishing a game plan on how your group will market the new portal and encourage patient adoption. We will discuss your plans during our next session.
## Configuration Training Session

- **TSI Trainer: Complete Basic Configuration.** Based on your Configuration & Admin form, our team will complete the basic configuration steps to prepare the foundations for your portal implementation. *As of this session, your licenses are installed and NextGen Patient Portal is live and active.*
- **Review Configuration.** Your team will have the opportunity to review the set-up completed. Your trainer will review how to make future changes to the file maintenance portions of Patient Portal.
- **Complete Any Additional Changes.**
- **Discuss Online Portal Statements.** As part of your demo session our team reviewed the ability to send online portal statements to patients. Practices seeking to take advantage of this functionality will need to complete submit a signed service agreement. Online portal statements help provide another way for your practice to communicate with patients about their outstanding balances and help reduce days in AR.
- **Discuss Online Bill Pay.** Online bill pay allows your patients to make payments through NextGen Patient Portal at no additional charge! This feature is available for practices that participate in the Portal Statement services. As an added value, TSI Healthcare has partnered with TransFirst, one of the nation’s leading payment processing organizations. Clients seeking to implement online bill pay will have the opportunity to schedule a credit card fee analysis during which our team will help you determine if better credit card rates are available. Credit card processing functionality is also available through NextGen EPM, also at no additional charge, allowing your team to collect payments directly and replace your stand-alone machine. We can provide additional information on all of these features.

## Preparing for your Next Session

- **Schedule/Confirm Dates for Complete Training.**
- **Review Dates for Complete Training/Recorded session trainings for the rest of your staff members.**
## Patient Portal Implementation Process

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<td>2</td>
<td>Demo Session, Configuration &amp; Admin Form</td>
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<td>3</td>
<td>Configuration Training Session</td>
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<td>4</td>
<td>Complete Training, Testing, and Complete Staff Training</td>
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<td>5</td>
<td>Patient Roll-Out &amp; Post Go-Live Follow-up</td>
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<td></td>
<td>Bonus</td>
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### Complete Training

Complete Training serves as your first session reviewing all content and functionality set-up during your configuration session. This is an opportunity for your Super Users to become accustomed to system functionality. Using this training, your Core Group will be better prepared to assist other practice staff during and after their Complete Training session.

- [ ] Complete EPM Training
- [ ] Complete Patient View Training
- [ ] Complete EHR Training
- [ ] Discuss Enrollment Workflow. How do you plan on enrolling patients to meet the 50% access requirement?
  - How do you plan on reaching the 5% “View, Download, Transmit” health information requirement?
    - [x] Check-In? Check-Out? New Patient Phone Calls?
    - [x] Will you provide a laptop or tablet?
    - [x] Will your staff walk the patient through the process?

- [ ] Discuss Patient Adoption & Marketing. Your Patient Portal is live and ready for deployment to patients. We recommended establishing a marketing plan prior to the End-User training and prepare to discuss that with the rest of your practice staff during your next session.

### Testing

After Complete Training is completed, the Core Group is responsible for completing testing on your portal. We recommend you utilize the checklist provided at the end of your Complete Training session as a list of functionality pieces to test and learn.

- [ ] Each Core Group Member: Create 1 Test Patient & Test Functionality. Staff may utilize an existing test patient already used for other projects or training purposes. You will be the super users for the portal within your clinic.
This testing is used to assist you in the ability to answer day to day questions should they arise from your co-workers.

- **Document Questions or Issues and submit to trainer.** If there are issues, schedule time to review **PRIOR** to end user trainings.

### Preparing for your Next Session

- Once testing is complete, confirm with your trainer that all features are functioning.
- Prepare for and confirm dates of the rest of the staff member’s Complete Training.
- **Review enrollment workflow.** Be sure this planned workflow will apply to your practice. End-user training is the best opportunity to share this with your team.
- **Prepare your marketing plan.** Share your marketing plan with your team.
Complete Staff Training

- EPM View
- Patient View
- Discuss Enrollment Workflow
- Discuss Patient Adoption
- EHR View
- Patient View
- Discuss Enrollment Workflow
- Discuss Patient Adoption

Preparing for Patient Roll-Out

- Set The Date. Establish a plan and set expectations for staff
- Set Enrollment Goals. Based on your appointment load, set appropriate goals. Your staff will not be able to enroll every patient from the start. Plan on incremental increases over a short period of time.
- Confirm Marketing Materials Are Ready.
### Patient Roll-Out

#### Day 1

- **Team Lead/Practice Manager:** Review the following with your team:
  - Enrollment Workflow
  - Goals for today, this week, next 3 weeks
  - Encourage providers to mention Portal to patients
- **TSI: Follow-up & Run Enrollment Report.** Your trainer will contact you during the morning of your Patient Roll-Out to determine how roll-out is progressing. We will also assist with running the enrollment report to determine if staff is meeting expectations.
- **Reassess Workflow.** Based on your first hand experience, determine if modifications should be made.

#### Day 3 & Forward

- **Run Enrollment Report.** Continue running the Enrollment Reports on a regular basis. Gauge staff participation levels. Confirm providers and all staff are mentioning Portal to patients.
- **Reassess Workflow.**
- **Contact TSI as Necessary.**

### Post Go-Live Follow-Up

- **TSI: Review Progress & Run Enrollment Report.**
- **Discuss Enabled/Disabled Features.** Are they working properly? Are there any that should be disabled or enabled based on your experience? Are there changes in routing rules, appointment types, etc that need to be made? Our team will shadow your Patient Portal Team Lead as they make those changes.

- **Confirm Patient Adoption/Marketing Plan is Active.**

- **Discuss Additional Resources.**
### Marketing Checklist

Patient Adoption of your new portal is directly correlated to the efforts your team makes to “push” this exciting new service to your patients. Please use this checklist as a guideline to enhancing the adoption and utilization of your portal.

Remember, your practice will derive the most value from your new Portal when your patient adoption is at its highest, when patients are interacting with your office online instead of on hold on the phone. Your practice efficiency will increase along with your patient satisfaction.

### Recommended Marketing Ideas

- Print your website address or the Portal’s address (nextmd.com) on appointment cards, letterhead, business cards, all patient handouts, and all traditional advertising.
- Customize your Patient Plan document to include information about the portal for patients who still receive a printed version.
- Advertise your website on your statements: “Pay your bill online @ [your practice web address or www.nextmd.com]. Call us today to enroll.” Notes may be added to your statements via Practice Preferences.
- Adapt your new patient workflow to include enrollment on the first phone call and completion of registration before their first visit.
- Mention your website and various features on voicemail, after-hours voicemail, and telephone on-hold messages.

#### Patient Portal Implementation Process

| 1 | Welcome Call |
| 2 | Demo Session, Configuration & Admin Form |
| 3 | Configuration Training Session |
| 4 | Complete Training, Testing, and Complete Staff Training |
| 5 | Patient Roll-Out & Post Go-Live Follow-up |

**Bonus**

- Additional Resources for Adoption Success
Tell patients they should go online to request appointments, check lab results, and refill prescriptions online, etc.  
Establish “Push Marketing” expectations with staff (ex. When a patient calls in for an appointment, say: “You can now request an appointment online through our Online Patient Portal”).  
Add a computer kiosk or laptop at check-in or check out so patients can register.  
Send a letter, email, or automated phone call to all of your patients to announce the new portal solutions.  
Provide the Patient with an Enrollment Token reminder card as they leave the office.

**Additional Easy and Inexpensive Portal Marketing Ideas**

- Hang posters/banners advertising your Portal in public areas of the office.  
- If you practice has digital display boards, update/add portal to the slides  
- Place table top “tents” with Portal Information in your waiting room and encounter rooms.  
- Ask nursing/MA staff to hand detailed info sheets as you move patients to the encounter room. Physically giving this to them while they wait on the doctor will increase likelihood they will read the information.  
- Have staff wear buttons advertising the portal.  
- Using the Broadcast Messaging feature, send mass notifications to your patients about the new portal. Continue sending messages during special times of the year featuring Portal Functionality (online bill pay, medication refills, etc or Breast Cancer Awareness Month Check-Ups, Back To School Physicals).  
- Add inserts to all office correspondence to patients to advertise Portal services.  
- Change the existing web browser homepage on each computer to land on Portal so your staff becomes familiar with the site.

**Free Resources**

- Starter Kit: As a special thank you for your continued support and confidence, we are providing your practice with educational literature your patients. Additional marketing items may be ordered by contacting us via helpdesk@tsihealthcare.com.  
- More information is available online at www.tsihealthcare.com/client-login.