Elation

GUIDE · 2026

PATIENT ENGAGEMENT

Is Your Practice Getting Patient Engagement Right?

A practical guide to building stronger patient relationships, improving outcomes, and cutting administrative work — without adding to your team's load.

6	90	0
Engagement gaps to close	Day action plan included	Added burden on your staff

OVERVIEW

Closing the Convenience Gap

Your patients book flights, move money, and message their kids' teachers from their phones. Then they call your front desk to schedule a physical.

Closing that gap is what patient engagement really means. Done right, it doesn't add work for your team. The right tools cut phone tag, reduce manual data entry, and give patients more control, while protecting the physician-patient relationship at the center of primary care.

This guide helps you find where the gaps are and what to do about them.

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Self-assessments to find your gaps

90

Day action plan to close them

01

SELF-SERVICE SCHEDULING

Let Patients Book Their Own Appointments

WHY IT MATTERS

Phone tag for appointment scheduling wastes valuable staff time and creates friction for patients. When patients can't easily book appointments, they may delay necessary care or look elsewhere. Self-service scheduling reduces administrative burden while giving patients the flexibility to book care on their own time.

> *"I have been encouraging my patients to set up their Passport accounts, and am extremely pleased with the overall system."*
>
> — PRACTICE PHYSICIAN

ACTION STEP

Turn on online self-scheduling for at least one appointment type (e.g., annual physicals, follow-up visits) over the next 30 days. Track adoption rates and staff time savings.

SELF-ASSESSMENT

Is your scheduling holding you back?

- [ ] Do patients call during business hours because they can't book online?
- [ ] Does staff spend real time on phone scheduling?
- [ ] Do patients struggle to find slots that fit their schedule?
- [ ] Are you experiencing high no-show rates due to scheduling confusion?

Self-scheduling that syncs with your EHR, so there's no double-entry and your calendar stays accurate.

Learn More →

02

SECURE MESSAGING

Make Communication Secure and Simple

WHY IT MATTERS

Patients have questions between visits, and playing phone tag creates delays in care and frustration on both sides. Secure messaging lets patients reach your practice when it suits them, and staff can reply when it's convenient, which cuts interruptions and keeps care on track.

24–48h

A realistic response window keeps expectations clear for patients

1

Chart. Every message documents itself automatically, nothing to re-enter

ACTION STEP

Turn on secure messaging for one patient group (say, patients managing chronic conditions) and set clear response protocols.

SELF-ASSESSMENT

Is patient communication streamlined?

- [ ] Can patients message your practice securely without calling or scheduling an appointment?
- [ ] Does your team have a clear way to triage and respond?
- [ ] Are patient communications automatically documented in the chart?
- [ ] Can patients easily access visit summaries, lab results, and care plans?

Secure messaging integrated directly into the patient chart means every communication is automatically documented and easily accessible during visits.

Learn More →

03

DIGITAL INTAKE

Simplify Patient Intake & Forms

WHY IT MATTERS

Clipboards and paper forms create data entry work for your staff and frustration for patients. Digital intake lets patients fill out forms before their visit, cutting wait times and duplicate entry. When intake flows directly into the EHR, staff can focus on care instead of paperwork.

FROM CLIPBOARD TO CHART

- → Patient completes intake form on any device before the visit
- → Responses flow directly into structured fields in the chart
- → Staff spend the visit on care, not re-typing paperwork

ACTION STEP

Convert your most commonly used intake form to a digital format and invite patients to complete it before their next visit. Measure time savings and patient feedback.

SELF-ASSESSMENT

Is intake creating friction?

- [ ] Are patients filling out paper forms in your waiting room?
- [ ] Does your staff manually enter patient information into the EHR?
- [ ] Do patients repeat the same information at every visit?
- [ ] Are visit delays caused by incomplete or unclear forms?

Digital forms that patients can complete on any device, with responses flowing directly into structured fields in the patient chart.

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04

PATIENT TRANSPARENCY

Give Patients Their Own Health Information

WHY IT MATTERS

When patients can easily view their visit summaries, lab results, medications, and care plans, they take a more active role in their care. That transparency builds trust, improves medication adherence, and helps patients follow through on care recommendations between visits. It also reduces "results check" calls to your practice.

↓

Fewer "results check" calls when sharing is automatic

60

Days to monitor portal adoption after turning sharing on

ACTION STEP

Turn on automatic sharing of visit summaries to your patient portal. Monitor portal adoption and feedback over 60 days.

SELF-ASSESSMENT

Can patients access their information?

- [ ] Can patients view visit summaries and care plans after appointments?
- [ ] Do patients have secure access to lab results when they're ready?
- [ ] Can patients review their medication list and care instructions at home?
- [ ] Is sharing automated, or does staff manually send information to patients?

Visit summaries, lab results, and care plans automatically shared with patients in an easy web and mobile experience.

Learn More →

AUTOMATED REMINDERS

05 Reduce No-Shows with Automated Reminders

WHY IT MATTERS

Missed appointments hurt both patient outcomes and practice revenue. Automated appointment reminders via text and email lower no-show rates without requiring staff time. When patients receive timely reminders with easy options to confirm or reschedule, they're more likely to show up, or give you notice if they can't.

HOW IT WORKS

- → Reminders send automatically via text and email at intervals you set
- → Patients confirm or request a reschedule right from the message
- → Your calendar updates itself, no staff follow-up call required

ACTION STEP

Turn on automated appointment reminders via text and email. Track no-show rate changes over 90 days.

SELF-ASSESSMENT

Are no-shows a problem?

- [ ] Is your no-show rate higher than 5%?
- [ ] Does your staff manually call patients to confirm appointments?
- [ ] Do patients miss appointments because they forgot or got confused about timing?
- [ ] Can patients confirm or reschedule from reminder messages?

Automated text and email reminders sent at intervals you set, with options for patients to confirm or request changes.

Learn More →

06

FAMILY & CAREGIVERS

Support Family & Caregiver Access

WHY IT MATTERS

For pediatric care, older patients, and those with chronic conditions, family and caregivers are central to care coordination. When caregivers can schedule, message, and see health information on a loved one's behalf, it reduces burden on patients and improves outcomes.

PEDIATRICS | AGING PATIENTS | CHRONIC CONDITIONS

ACTION STEP

Enable proxy access for caregivers of at least one patient population (e.g., pediatrics, aging patients) and create a simple process for setting up access permissions.

SELF-ASSESSMENT

Is caregiver access supported?

- [ ] Can parents/guardians access their children's health information and schedule appointments?
- [ ] Can caregivers securely communicate with your practice on behalf of patients?
- [ ] Are proxy permissions easy to set up and manage?
- [ ] Do family members have to call your office for routine tasks they could handle online?

Family-centered features that make it easy to grant appropriate access to caregivers while maintaining security and privacy.

Learn More →

A UNIFIED APPROACH

A Unified Patient Engagement Strategy

The best patient engagement solutions don't feel like separate tools, they feel like a seamless extension of your practice. Every interaction patients have with you, in person, online, or by phone, should feel connected and simple.

WHAT ONE CONNECTED EXPERIENCE LOOKS LIKE

- → A patient schedules an appointment online at 11 PM
- → They complete intake forms on their phone before the visit
- → After the appointment, they automatically receive a visit summary and care plan
- → They securely message a follow-up question mid-week
- → They receive an automated reminder before their next visit

✓ **None of it required anyone on your staff to touch a fax, re-key data, or make a call.**

KEY PRINCIPLES FOR SUCCESS

1. START WITH ONE WORKFLOW

Don't try to transform everything at once. Pick one high-impact area and do it well.

2. INTEGRATE, DON'T ADD

Every interaction should document itself in the chart, with nothing to re-enter.

3. MEASURE WHAT MATTERS

Track portal adoption, no-show rate, staff admin time, and patient satisfaction.

4. COMMUNICATE THE CHANGE

Patients can't use what they don't know exists. Keep the message simple.

COMMON BARRIERS

Common Barriers (and How to Overcome Them)

"Our patients aren't tech-savvy"

REALITY CHECK

The 2026 Digital Health Trends report found 71% of US adults already use health-related apps, and 88% want the same or more technology for health management. Even older patients are increasingly comfortable with digital tools.

SOLUTION

Start with your most tech-comfortable patient segment and expand from there. Offer in-office assistance with enrollment.

"We don't have time to implement new tools"

REALITY CHECK

Modern patient engagement tools save time after a short implementation period.

SOLUTION

Choose tools that integrate with your existing EHR and phase implementation one feature at a time.

"Our staff worries about being overwhelmed"

REALITY CHECK

Secure messaging often reduces interruptions compared to phone calls, because staff can respond when convenient and triage efficiently.

SOLUTION

Set clear response-time expectations (e.g., 24-48 hours for non-urgent questions) and establish triage protocols.

"Our last patient portal went unused"

REALITY CHECK

Most early portals were hospital tools handed down to small practices, built to serve a system rather than the physician-patient relationship. Patients could tell.

SOLUTION

Don't judge a portal on its feature list. Judge it on who it was built for, then make the first login worth it.

NEXT STEPS

Your 90-Day Action Plan

1–30 Assess & Plan

- [ ] Complete all self-assessments in this guide
- [ ] Identify your top 2–3 patient engagement priorities
- [ ] Review your current tools and identify gaps
- [ ] Get team input on pain points and opportunities

31–60 Implement & Train

- [ ] Select or configure patient engagement features
- [ ] Train staff on new workflows and protocols
- [ ] Create patient-facing communications and materials
- [ ] Pilot with a small patient cohort

61–90 Optimize

- [ ] Review metrics and gather feedback from pilot group
- [ ] Adjust workflows based on early learnings
- [ ] Expand to broader patient population
- [ ] Celebrate wins with your team

METRICS THAT MATTER

PATIENT PORTAL ADOPTION | NO-SHOW RATE | STAFF ADMIN TIME | PATIENT SATISFACTION

Elation

ABOUT ELATION HEALTH

Most EHRs were built for hospitals. Elation was built for independent primary care, and Elation Passport is what that difference looks like for your patients.

Elation Health is the leader in modern primary care technology, trusted by over 50,000 clinical users and 25 million patients. Patient Passport delivers self-scheduling, secure messaging, automatic visit summaries, and caregiver access, all built into the chart rather than bolted on. Every interaction documents itself. Nothing to re-enter, no separate system for your staff to manage. Passport is included with Elation at no extra cost.

50,000+
Clinical users on the Elation platform

25M
Patients receiving Elation-powered care

$0
Extra cost for Patient Passport

Purpose-built for your modern primary care success.

Transform Patient Engagement

See how Elation's Passport helps your practice give patients a modern, connected experience without adding to your team's load.

Schedule a Demo →

www.elationhealth.com/demo