Patient Engagement Platform - Training Guide

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1. Introduction

As the Product Owner, I developed this training guide for the Patient Engagement Platform (Jul 2022 - Dec 2022) to support hospital staff and patients in using the platform for appointment scheduling and communication. This 2-3 page excerpt, part of a 10-page manual, was distributed to three hospitals in Dec 2022, ensuring smooth adoption and contributing to a 15% no-show reduction and 20% patient satisfaction increase. The guide covers key tasks like booking appointments, managing reminders, and accessing analytics.

2. Audience

- Patients: Booking and managing appointments.

- Hospital Admins: Configuring reminders, viewing analytics.

- Clinicians: Monitoring no-show trends.

3. Prerequisites

- Access to Patient Engagement portal (web/mobile).

- Login credentials (provided by hospital IT).

- Basic smartphone or computer skills.

4. Step-by-Step Instructions

Task 1: Booking an Appointment (Patients)

- Step 1: Visit [Patient Engagement portal URL] or open the mobile app.

- Step 2: Log in with your patient ID and password.

- Step 3: Click “Book Appointment” on the homepage.

- Step 4: Select provider, date, and time slot from the calendar.

- Step 5: Confirm details and submit.

- Expected Result: Receive confirmation email within 1 minute.

- Notes: Contact hospital IT if slots are unavailable (may indicate EHR sync issue).

Task 2: Configuring Reminders (Admins)

- Step 1: Log into admin portal with credentials.

- Step 2: Navigate to “Settings” > “Reminders.”

- Step 3: Enable SMS/email reminders, set to 24 hours prior.

- Step 4: Save changes and test with a sample appointment.

- Expected Result: Reminder sent to patient; delivery status visible in dashboard.

- Notes: Ensure patient contact info is updated in EHR.

Task 3: Viewing No-Show Analytics (Clinicians)

- Step 1: Log into clinician portal.

- Step 2: Go to “Analytics” > “No-Show Trends.”

- Step 3: Filter by date or provider.

- Step 4: Export to CSV for reporting (optional).

- Expected Result: Dashboard shows real-time no-show rates, accurate to EHR data.

- Notes: Contact IT if data discrepancies occur.

Task 4: Switching Languages (Patients)

- Step 1: Log into portal (web/mobile).

- Step 2: Click language toggle (top-right) to select English or Spanish.

- Step 3: Navigate through booking or reminders to verify text.

- Expected Result: Interface fully translated, no errors.
- Notes: Report translation issues to hospital admin.

5. Troubleshooting

- Issue: Cannot log in. Solution: Reset password via “Forgot Password” link.
- Issue: No confirmation email. Solution: Check spam folder or contact IT.
- Issue: Analytics not updating. Solution: Verify EHR sync status in admin portal.

6. Additional Resources

- FAQ: Available on [portal URL]/faq.
- Support: Email [hospital support email] or call [hospital IT number].
- Feedback: Submit via portal’s feedback form (added in sprint 5).