

CASE STUDY

Connecting Patients to Care

How a year-long MyChart campaign transformed digital access, trust, and adoption

A unified messaging initiative that turned confusion into confidence—proving that when people understand the journey, they're far more likely to join it.



BACKGROUND

When the MyChart initiative began, adoption sat at just 12%, well below the 30% target needed to qualify for Epic's incentive. Patients didn't understand the portal's purpose or value, and the existing materials—dense with technical jargon and confusing visuals—failed to engage.

Executives formed a cross-department committee to drive adoption. I represented the marketing department, coordinating efforts across IT, clinic leadership, and communications. This wasn't just a digital rollout—it was a system-wide shift in how Salem Health communicated with patients about care access.

CHALLENGE

- **Low awareness & unclear benefits:** Patients saw MyChart as another login, not a useful tool.
- **Technical barriers:** Existing instructions were cluttered and filled with jargon.
- **Fragmented experience:** Inconsistent materials across web, print, and clinics.
- **Accessibility gaps:** Content lacked plain language, Spanish translations, and mobile design.
- **High visibility project:** The initiative was under executive and IT leadership scrutiny, with monthly committee reviews.

STRATEGY | Making Digital Care Human | Part 1

The MyChart campaign began as a system-wide initiative to improve patient access and digital engagement. While Salem Health's goal was to get more people to sign up for MyChart, my goal was to make MyChart simpler, more intuitive, and more trusted. By focusing on clarity, consistency, and compassion in every message, the campaign helped patients see MyChart as part of their care experience, not just another login.

Objectives

1. Raise adoption above 30% system-wide.
2. Modernize how patients learn about and use MyChart.
3. Create a cohesive, bilingual experience across all materials.
4. Strengthen patient confidence and reduce confusion.
5. Build collaboration between Marketing, IT, and clinical staff.
6. Deliver measurable results for executive reporting.

Target Audiences

We prioritized segments based on clinic feedback and observed behavior patterns.

Primary Segments

1. Adult children of aging parents

- *Message:* "Help mom or dad manage care from anywhere."
- *Tactics:* Proxy-access guides, QR-coded rack cards, front-desk scripts.

2. Adults 50+

- *Message:* "Skip phone tag. See results faster."
- *Tactics:* Large-type handouts, bilingual pages, help-at-check-in prompts.

3. Adults 30–50

- *Message:* "Finish sign-up in a minute. Message your care team on the go."
- *Tactics:* Mobile-first emails, app download CTAs, simple web path.

Measurement (Privacy-Safe)

We tracked adoption rates, proxy sign-ups, QR scans, and web engagement—no personal data used.

We began by reimagining how Salem Health talked about digital access. The strategy centered on clarity, cross-department coordination, and consistent messaging across every channel. The campaign aimed to simplify, educate, and build trust—helping patients see MyChart as a direct connection to their care, not another app to manage.

Audience Strategy & Targeting

We prioritized segments based on clinic feedback and observed behavior patterns.

Primary Segments

1. Adult children of aging parents

- *Message:* “Help mom or dad manage care from anywhere.”
- *Tactics:* Proxy-access guides, QR-coded rack cards, front-desk scripts.

2. Adults 50+

- *Message:* “Skip phone tag. See results faster.”
- *Tactics:* Large-type handouts, bilingual pages, help-at-check-in prompts.

3. Adults 30–50

- *Message:* “Finish sign-up in a minute. Message your care team on the go.”
- *Tactics:* Mobile-first emails, app download CTAs, simple web path.

Measurement (Privacy-Safe)

We tracked adoption rates, proxy sign-ups, QR scans, and web engagement—no personal data used.

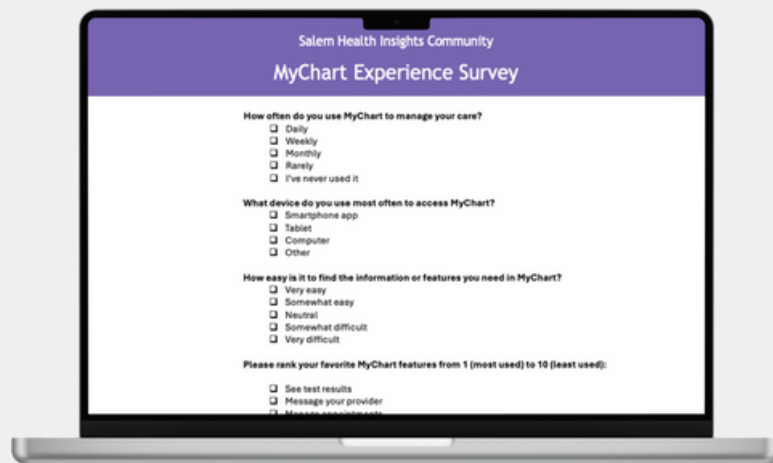


Audience Insight & Message Refinement

To guide our messaging, we partnered with VisionCritical (now Alida)—an opt-in patient community used for feedback and testing. When surveyed about their favorite MyChart features, we were surprised by the results. This insight reshaped our message hierarchy. We shifted from promoting administrative tasks (“manage appointments”) to emphasizing immediacy and connection (“get your results fast” and “message your provider directly”).

Top-ranked features:

1. See test results
2. Message your provider
3. Manage appointments
4. Schedule imaging
5. Request refills
6. Access virtual care
7. See discharge instructions
8. Download records
9. Link family accounts
10. Pay bills

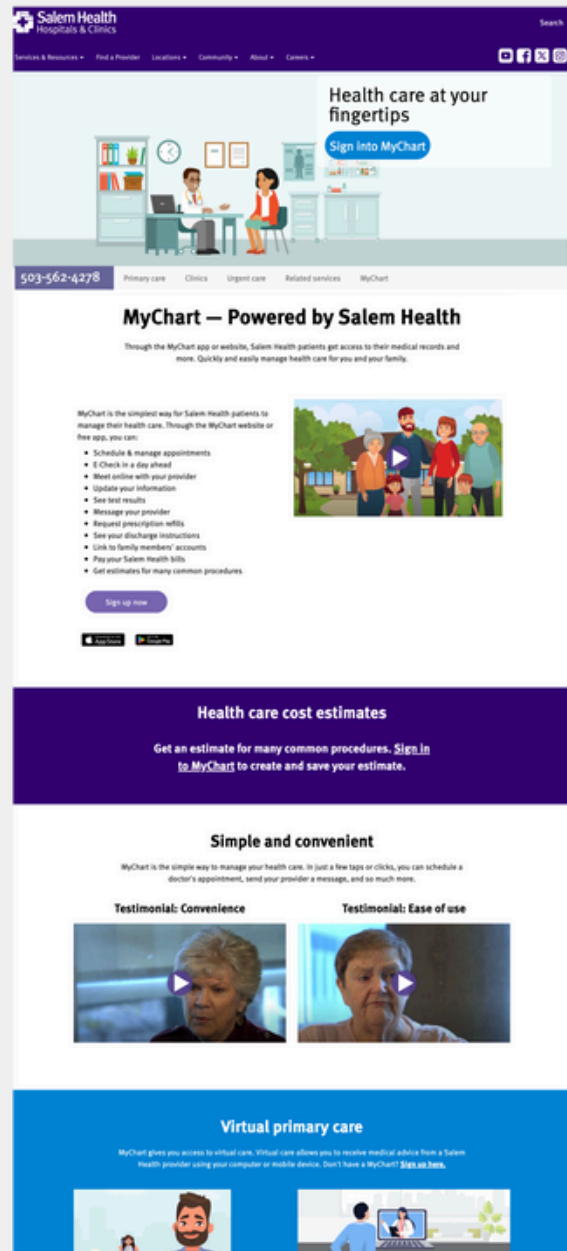


Human First Messaging

We began by reimagining how Salem Health talked about digital access. The strategy centered on human clarity, cross-department coordination, and consistent messaging across every channel. The campaign aimed to simplify, educate, and build trust—helping patients see MyChart as a direct connection to their care, not another app to manage.

Built the Digital Hub

I designed and launched the new MyChart landing page from scratch—writing all copy, structuring layout, selecting imagery, and ensuring mobile optimization. The page housed tutorials, FAQs, and quick links to both desktop and app experiences.



ACTION | Bringing the Plan to Life | Part 2

Reimagining Patient Education

Existing IT-created instructions were cluttered and confusing, with mismatched screenshots and no visual guidance. I led a complete redesign:

- Produced step-by-step video tutorials for both web and mobile.
- Created printable written guides to accompany each video.
- Directed bilingual versions (English and Spanish).
- Worked with Epic's brand team to approve a promotional video, writing the narration, storyboard, and visual direction.

Print Materials & On-Site Visibility

We developed rack cards (English & Spanish) promoting MyChart and explaining sign-up. Each included a QR codelinking to the landing page—tracked via UTM parameters to measure engagement. Despite initial skepticism toward QR codes, analytics proved consistent use.

I personally distributed materials to every primary care and urgent care clinic and placed pull-up banners highlighting top features in high-traffic areas.



ACTION | Bringing the Plan to Life | Part 3

Email Campaigns: Consistent Connection

We ran monthly MyChart awareness emails targeting patients who had completed an appointment within 18 months. Each message highlighted a single feature and directed users to the landing page.

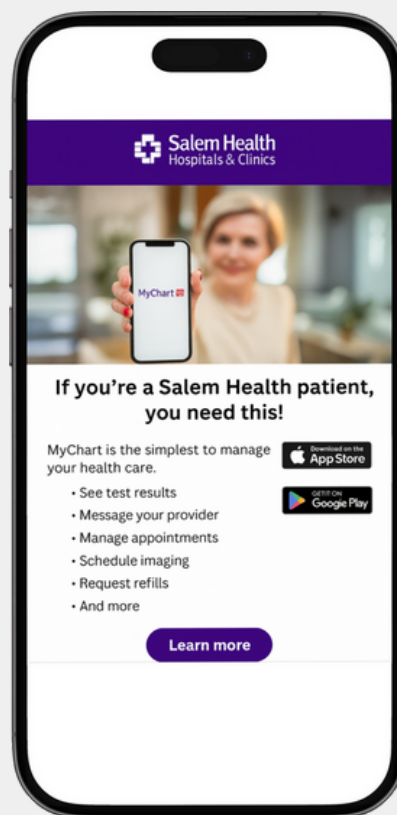
The campaign's **breakout success** came from a plain-language spotlight email focusing on test results and messaging providers. That message achieved 80%+ open rates using a subject of "If you're a Salem Health patient, you need this," 70%+ click-throughs, and triggered the largest single-week adoption spike—pushing total usage from 12% to 24%.

Governance & Measurement

To maintain clarity and consistency, I established the MyChart landing page as the single source of truth. Outdated materials were retired, and a dashboard tracked adoption rates, video views, QR usage, and web engagement. This data informed quarterly updates to materials and messaging.

Cross-Functional Leadership

I worked within a multidisciplinary MyChart Committee composed of IT, clinic managers, and security stakeholders. While they handled technical implementation, I owned public communication and user experience. I presented monthly adoption metrics and proposed adjustments, earning executive support for continued investment in patient education and analytics.



Bringing the Plan to Life: Part 3

RESULTS & IMPACT

- **The campaign exceeded its goal of 30% adoption, reaching 36% within nine months; 4 months early.**
- Helped patients feel more confident and connected to their care through clearer communication.
- Strengthened collaboration between Marketing and IT, proving how fast, coordinated teams can deliver meaningful change.

LESSONS LEARNED

- **Clarity beats complexity.** People respond best when instructions feel simple, visual, and conversational.
- **Consistency builds trust.** When messaging matched across web, email, and clinic materials, adoption followed naturally.
- **Cross-team alignment accelerates progress.** Collaboration between Marketing and IT created faster turnarounds and fewer barriers.
- **Equity is strategic.** Designing bilingual and mobile-first materials wasn't optional, and sometimes not popular. But it was essential to reaching everyone.
- **Empathy scales up.** By focusing on human understanding, not just technology, MyChart became part of the care experience instead of another digital hurdle.

WHY THIS MATTERS FOR CHERRIOTS

This campaign parallels the mission of connecting people to opportunity:

- **Unified public experience:** Clear, accessible web and print information—just like route and service updates.
- **Community engagement:** Digital + on-site communication to reach diverse riders.
- **Equity:** Bilingual, readable, mobile-friendly content for every audience.
- **Cross-department coordination:** Aligning operations, IT, and outreach for consistent messaging.
- **Data-informed storytelling:** Turning metrics into insight for board reporting and public trust.

*Whether it's patients or passengers, the principle is the same: **clarity connects people.***

Collin Nelson

503-341-8622
collinnelson@live.com
linkedin.com/in/collinnelson