Equicare's Marketing Kit: How to Edit

Introduction

Welcome to Equicare's Customer Marketing Kit! The kit contains several items that are intended to help your patients understand how to use Patient Portal, inform the general public about your patient engagement program, and provide a product overview for your organization's staff.

All of the items in this kit are yours to customize, edit and use in the manner you chose, including adding your own logo, changing the text, and editing images. Items intended for print have been included as Adobe InDesign files that can be customized and exported to PDF for professional quality printing, and as Word Documents that can be edited and printed with a desktop printer

To get started, we recommend downloading and installing the fonts so that you won't encounter errors. Simply click to download and save the files you're interested in using. If you have additional questions about using your marketing kit, please contact rachel.richardson@equicarehealth.com

Installing the Fonts

Some of the items included in this kit use unique fonts. We have included these fonts for you, and to maintain the look and feel of the marketing kit items, we recommend installing these fonts on your computer. To do this:

1. Open the downloaded zip folder and select all of the font files
2. Right click and select copy
3. Navigate to the control panel and select fonts to view the list of your currently installed fonts
4. Right click and select paste to install the new fonts here.

Patient Portal Brochure

InDesign File

1. Modify the place holder text. Place holder text includes:
    a. The name of your patient portal (if you give it a unique name), and its URL
    b. Your organization's contact information (found in the "Getting Started," Privacy," and "Contact us" sections
    c. The forms available to download (found in the "Do more with Patient Portal" section")
2. Delete the place holder logo and insert your own logo. (From the Links tab, right click on the image called yourlogo.png, select Relink, and navigate to find your own logo) Due to the background of the brochure, you logo will look best with a transparent background (.png format)
3. To export for printing, select File, Export, and export as Adobe PDF (print). In the dialogue box options, select "Marks and Bleeds" and ensure both the crop and bleed mark boxes are ticked, and select "Use document bleed settings"

4. Click Export, and you will now have a customized, print-ready PDF.

Word Document

1. Modify the place holder text. Place holder text includes:
    a. The name of your patient portal (if you give it a unique name), and its URL
    b. Your organization's contact information (found in the "Getting Started," Privacy," and "Contact us" sections
    c. The forms available in your forms download section (found in the "DO more with Patient Portal" section")
2. Replace the place holder logo with your own (Right click, select "Change Picture", and navigate to select your own logo) Due to the background of the brochure, you logo will look best with a transparent background (.png format)
3. Save the document, and print on a local computer.

Patient Portal Reminder Card

InDesign File

1. Modify the place holder text with your own details. The placeholder text includes:
    a. The patient portal name
    b. The patient portal URL
    c. Your organization's contact details
2. Replace the placeholder logo with your own (From the Links tab, right click on the image called yourlogo.png, select Relink, and navigate to find your own logo)
3. To export for printing, select File, Export and export as Adobe PDF (print). In the dialogue box options, select "Marks and Bleeds" and ensure both the crop and bleed mark boxes are ticked, and select "Use document bleed settings"
4. Click Export, and you will now have a business card sized document that is ready to send to your printer.

Word Document

This document uses a business card template that you can print on your office printer. It will need to be trimmed and cut to be the appropriate size.

1. Modify the place holder text in one of the "cells" with your own details. The placeholder text includes:
    a. The patient portal name (page 1)
    b. The patient portal URL (page 1)
    c. Your organization's contact details (page 2)
2. Copy your changes to the other "cells." Because text is included within text boxes, you can preserve formatting by copying text from within each text box individually, rather than trying to copy the entire card.
3. Replace the placeholder logo with your own (Right click, select "Change Picture", and navigate to select your own logo).
4. Repeat this process for each of the cells with the place holder logo.

5. Save the document and Print it double sided, then cut up to create customized business cards.

Patient Portal Poster

Customize the InDesign File

1. Replace the placeholder text. This includes
    a. The Patient Portal name (if you have a unique name)
    b. Your contact details
2. Replace the placeholder logo with your own (From the Links tab, right click on the image called yourlogo.png, select Relink, and navigate to find your own logo). Due to the background of the brochure, you logo will look best with a transparent background (.png format)
3. To export for printing, select File, Export, and export as Adobe PDF (print). In the dialogue box options, select "Marks and Bleeds" and ensure both the crop and bleed mark boxes are ticked, and select "Use document bleed settings"
4. Click Export, and you will now have a customized, print-ready PDF.

Customize the Word Document

1. Replace the placeholder text. This includes
    a. The Patient Portal name (if you have a unique name)
    b. Your contact details
2. Replace the placeholder logo with your own (Right click, select "Change Picture", and navigate to select your own logo). Due to the background of the brochure, you logo will look best with a transparent background (.png format)
3. Save the document and print on your desktop printer.

Press Release Template

1. Add your own logo - Double click within the header portion of the template to select the header. Right click on the logo template, and select "Change picture" from the menu. Navigate to the find your logo and select OK to replace the Place holder logo with your own.
2. Incorporate your address - Double click within the header portion of the template to select the header. Click on the place holder address, and replace the information with your own.
3. Customize the text of the press release - Place holder text within the press release has been bolded, so ensure all bolded text, including the headings, is replaced with the correct information for your organization. You can also change any of the other text, and delete the suggested quote from your organization.
4. Save the file, and distribute to your public relations agency, or post on the sites of your choosing

Physician Introduction Letter

1. Add your own logo - Double click within the header portion of the template to select the header. Right click on the logo template, and select "Change picture" from the menu. Navigate to the find your logo and select OK to replace the Place holder logo with your own.

2. Incorporate your address - Double click within the header portion of the template to select the header. Click on the place holder address, and replace the information with your own.
3. Customize the text of the letter to represent how your organization would like to work with physicians. Ensure you replace all Place holder text including:
    a. Physician name
    b. Your organization name
    c. Your organization contact details and website
    d. Any text you would like to place in the footer (date, location, copyrights etc.)
4. Save the file, and distribute to the physicians treating your patients.

PowerPoint Template

1. Along the top of the screen, click the "View" tab and then select "View Slide Master." The top slide is your master.
2. Either delete the place holder logo or replace with your own. To replace the logo, right click on the logo within this slide, and select "Change picture"
3. Navigate to find your own logo and select to replace the place holder.
4. Click on the copyright text in the bottom right to delete or customize with your own copyright or confidentiality information.
5. Click "Close Master View" to get back to the normal powerpoint view.
6. The slides can now be used or edited to share the message of your choice.