



# Creating a Successful Patient Engagement Environment

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- Understanding patient engagement
- Creating a culture of engagement
- Review of engagement strategies
- Meaningful use and patient engagement



# Patient engagement: More than a portal

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“Meaningful patient engagement, the kind that leads to long-term health behavior change, begins with patient-centered, interpersonal relationships between patients and their doctors. As far as I know, we don’t have an app for that.”

*John Moore*

*Founder and Managing Partner, Chilmark Research*



# Authentic engagement

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- Patient engagement is more than an incentive program requirement
- Must occur interpersonally, not exclusively online
- Leads to increased patient participation in health management
- Prepares practices for a successful future in healthcare



# Patient benefits

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- Cost of care shrinks when patients are knowledgeable, skilled and confident about managing their care<sup>1</sup>
- Fewer hospital admissions<sup>2</sup>
- Improved access to health records
- Improved patient satisfaction



<sup>1</sup><http://content.healthaffairs.org/content/32/2/216.abstract>

<sup>2</sup><http://www.ncbi.nlm.nih.gov/pubmed/23381521>



# Practice benefits

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- Improved patient outcomes<sup>1</sup>
- Patients more likely to keep appointments when engaged in care
- Streamlined communication ensures nothing is overlooked
- Improved efficiency in sending routine patient communications
- Increased patient loyalty

<sup>1</sup>[http://www.healthaffairs.org/healthpolicybriefs/brief.php?brief\\_id=86](http://www.healthaffairs.org/healthpolicybriefs/brief.php?brief_id=86)





# Culture of engagement

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- Patient engagement happens throughout your practice
- Identify how your practice wants to engage patients
  - In person
  - Over the phone
  - Via social media
  - Online
  - Through a patient portal





# Keys to effective patient engagement

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- Transparency
- Repetition
- Resources
- Patience
- Goals



Source: Thomas Goetz, *The Decision Tree*, 2011





- The myth of the ‘all-knowing’ physician
  - Some patients leave appointments without a clear understanding of diagnoses or treatments because they are afraid to ask questions
- Encourage providers to share what they do and do not know about patients’ conditions or courses of treatment
  - This will help patients feel comfortable participating in dialogue about their health



# Repetition

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- For staff, the clinic is a comfortable place, part of their routine. For patients, it can be frightening, intimidating or uncomfortable
- Many patients analyze every comment a provider makes yet most information is forgotten by the time they leave
- Repetition is vital to retention of instructions and information
- If patients don't write down instructions, provide them with written diagnosis, treatment and prescription information



- Give patients access to their records, lab results and notes
- Direct patients to online forums and websites that your practice has reviewed and approved
- Inquire about patients' Internet use. If patients are researching conditions online, ask what they've read and help them understand whether it's relevant

Source: Thomas Goetz, *The Decision Tree*, 2011



- Patients do not always take their providers' advice. They may even do the opposite
  - If so, talk to patients about why they chose not to listen
  - This may help the physician and patient find a more successful treatment plan
  
- Not all patient encounters or treatment plans will end successfully, don't be discouraged by failures
  - Help discouraged patients (and providers) understand that they can make their way toward better health in spite of a few missteps
  - Explain that treatment responses vary from person to person and encourage them not to lose hope if attempts aren't effective

Source: Thomas Goetz, *The Decision Tree*, 2011



- Encourage patients to develop healthy goals
  - Talk about their health goals and how you can help them achieve them
  - Provide a to-do list or summary at checkout, so they leave with a provider-approved plan to help them succeed
- Identify areas where patients can take control of their health
- Develop patient engagement goals with each staff member and help them see how they can engage with patients every day
  - Make sure goals are specific, measurable, attainable realistic and time-bound (S.M.A.R.T.)

Source: Thomas Goetz, *The Decision Tree*, 2011



# Getting started

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- Involve staff in patient engagement efforts — they'll need to embrace the initiative for your practice to see a real change
- Design workflows around employees' skills and your practices' unique strengths
- Discuss the benefits of patient engagement with staff regularly, keeping the office motivated





# Building enthusiasm

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- Host a staff “lunch & learn” to launch new engagement efforts
  - Explain the benefits of patient engagement and share why you’re excited about improving engagement in your practice
  - Brainstorm tools and resources that can help, ask for feedback
  - Identify misconceptions about engagement, including portal usage
- Schedule regular reviews of each staff member’s goals
  - Award prizes upon completion
- Host contests for staff who sign up the most patients on the portal
  - If you have multiple locations, they can compete with each other
- Track the percentage of patients engaging via patient portal. Celebrate milestones and offer incentives





# Sticking with it

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- Review the effectiveness of engagement efforts
  - Identify what works and for whom. For example, does a certain patient group respond better to a specific method?
- Adapt and improve ineffective efforts
- Encourage staff to share new ideas
- Remind providers that staff will follow their lead — they must implement engagement efforts, too!







# Communication

- People communicate, process and interpret information differently
- Take cues from how patients communicate with you to determine how to reach them
  - For example, if they are soft spoken, you should be soft spoken
- Invite patients to ask questions
- Ask if patients understand next steps





# Communicating effectively

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- Train staff in effective communication
  - Listening
  - Nonverbal communication
  - Managing stress
  - Emotional awareness



Source: [http://www.helpguide.org/mental/effective\\_communication\\_skills.htm#online](http://www.helpguide.org/mental/effective_communication_skills.htm#online)



- Focus on what is said and how the speaker feels about it
- Avoid interrupting
- Don't judge the speaker
- Show your interest by asking questions
- Restate what the person said to confirm your understanding



# Nonverbal communication

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- Body language can help you understand how someone is feeling
  - Practice observing people and be aware of individual differences
  - Learn to interpret and use nonverbal communication effectively. For example, nod to show someone you hear and understand what they're saying
  - Open body language — arms uncrossed, standing with an open stance or sitting on the edge of your seat — will help patients feel comfortable approaching you
  - Look patients in the eye when you speak to them



# Managing stress

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- Stress can inhibit a positive patient engagement
- Recognize when you are becoming stressed
- Calm down
  - Take deep breaths or take a short walk
- Look for the humor in things
- Look for opportunities to compromise
- Agree to disagree



# Emotional awareness

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- Emotions play an important role in communication
- Analyzing how you feel can help you better understand how patients feel
- Understanding your own emotions can help you communicate clearly and effectively, especially when delivering negative messages



# Communication

- High-level communication skills come with practice, and the patient experience is catapulted to the next level when everyone uses the same techniques
  - Initiate an office meeting to discuss and practice these skills
  - Ask coworkers to observe your interactions with patients and provide constructive criticism
  - Encourage staff to see the office from the patient's perspective





- Execute role-specific engagement activities.
  - Check-in staff can greet patients warmly, using their name
  - Clinical staff can ask if there's anything the patient would like to speak to the doctor about in addition to the reason for visit
  - Check-out staff can offer to email or text the patient with their next appointment date
  - Billing staff can include portal registration and payment information with bills





- Make sure everyone understands how their tasks contribute to overall goals
- Coach staff on proper conduct and attitude





- **Patients are most likely to respond to physician instruction than anyone else in the practice**
- Physicians can engage with patients in various ways
  - Invite patients to ask questions during exams
  - Verbally confirm that patients understand diagnosis and treatment
  - Provide tips for making positive life changes





- Physicians can promote portal usage, too
  - Ask the patient if they are registered for the portal and if not, encourage them to get started
  - Inform patients that any questions that arise after the exam can be submitted through the portal
  - Thank them for using the portal





# Patient portal

- Patient portals are a great engagement tool and all staff should be able to share the benefits
- Portal benefits include:
  - Improve patient outcomes
  - Secure connection between patients and caregivers
  - Help practices meet requirements of incentive programs such as meaningful use Stage 2
  - Streamline office workflows and improve efficiency
  - Simplify prescription refill requests
  - Minimize paperwork
  - Faster response time
  - More secure than voicemail





# Recruiting for the portal

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- Everyone in the office should encourage patients to use the portal
  - On the phone
    - Use on hold messages to share the benefits of the portal
  - In the waiting room
    - Interns can demonstrate the portal and register patients
    - Front office staff can provide patients with portal registration information
  - In the exam room
    - Medical assistants and nurses enroll patients or help with passwords or other issues
  - At checkout
    - Inform patients they can pay bills or change appointments through portal



- Staff and providers can emphasize the convenience and access of the portal using phrases like:
  - “It’s the best way to reach me”
  - “You won’t have to wait on the phone or leave messages”
  - “You’ll get your lab results quickly”
  - “If you think of questions after you leave, send them to us through the portal”



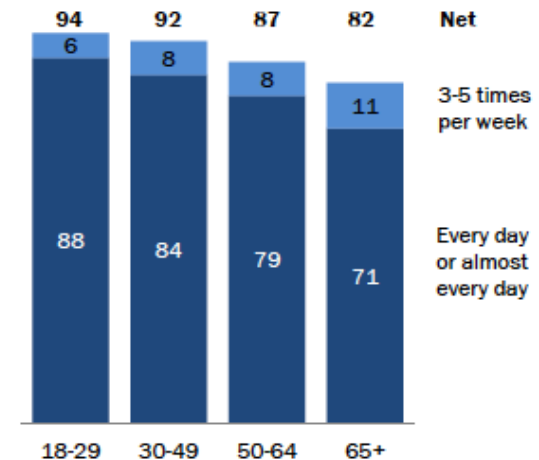


# Portal challenges

- For patients who lack Internet access or are not comfortable using the patient portal, suggest:
  - Accessing the Internet at the public library or other locations
  - Having a family member use the portal as a designated proxy
- Elderly patients may resist using the portal
  - Discuss the portal's value
  - Allow adult children to act as proxy

## A majority of older internet users go online on a daily basis

*% of internet users in each age group who go online*



Pew Research Center's Internet Project July 18-September 30, 2013 tracking survey.



## Customer success story

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**Ranetta S. Scott, CPC, CHTS-PW**

Ranetta is in charge of coding, clinical informatics including meaningful use, PQRS, security risk and all portals at Cardiology Physicians Associates LLC, a hospital-owned cardiology practice with seven physicians and five locations in five counties around Hickory, NC .





# Registering patients for portal

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- Staff members registers patients and either gives the temporary password or mails the temporary password to the patient
  - Resulted in increased participation
- Registered more than 1,400 patients in eight months
- On schedule to meet MU Stage 2 requirement



# Engaging patients on portal

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- Remind patients that they can update their paperwork online to save time in the office
- Post portal links to patient paperwork, including an electronic medical records request that provides patients with free records
- Send visit summary via secure messaging. Many patients forward the document to their family practice
- Ask patients to review and confirm medication accuracy via the portal. This starts a line of communication that counts toward meaningful use requirements



# Engaging patients on portal

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- Send newsletters that include information such as closings due to inclement weather or holidays, and reminders to send timely prescription requests
- Publish semi-monthly newsletter with educational information, including information on upcoming health fairs at local hospitals
- Host patient portal user group sessions to teach patients how to become portal “superusers”



# Meaningful use

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- Meaningful use Stage 2 requires online engagement, communication and information sharing between practices and patients
- Practices who wish to participate in MU Stage 2 must have a patient portal and messaging solution as part of their meaningful use-certified solutions





## Core Objective 13

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- Use certified EHR technology to identify patient-specific education resources and provide those resources to the patient if appropriate
- Tips to help you meet the objective:
  - Follow up on an in-office discussion by sharing an educational topic using **secure messaging**
  - Ask patients what they think — this will help solicit a response via secure messaging
  - Choose a timeline that works for your practice and make this a process



## Core Objective 8

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- Provide clinical summaries for patients for each office visit
- Tips to help you meet the objective:
  - Create a dialogue to help your patients understand their clinical summaries
  - Help patients take an active role in their healthcare
  - Show the importance of using the patient portal
  - Send a follow-up message through secure messaging
  - Choose a timeline that works for your practice and make this a process



## Core Objective 7

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- Provide patients the ability to view online, download, and transmit their health information within four business days
- Tips to help you meet the objective:
  - Encourage new patients to register for the portal and download new patient paperwork prior to first appointment
  - This can increase portal registrations and begin habit or portal usage



# Tracking progress



- Provide your entire staff with regular updates on progress toward meeting meaningful use objectives
- Identify areas where you're doing well and where you can improve. Come up with a plan of action
- Celebrate when you meet your goals for meaningful use and for creating an environment where patients are actively engaged in their health





# Questions?

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