



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

Patient Engagement

Natalie Martin & Val Tuerk, Object Health
June 25, 2014
6:00 pm to 7:30 pm



Agenda

- ① Defining Patient Engagement
- ① Requirements for Meaningful Use and PCMH
- ① Patient Engagement from a Clinical Perspective
 - ① Best Practice Strategies
 - ① Patient Self Management
- ① Patient Engagement from a Technological Perspective
 - ① Patient Portals
- ① Contact Information

3

WHAT IS PATIENT ENGAGEMENT?



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

Patient Engagement is the process by which a patient becomes invested in their own care; the actions that a patient must take to obtain the greatest benefit from the healthcare services available to them.



WHY PATIENT ENGAGEMENT?

The main reason for the focus on patient engagement is that it is linked to **quality patient outcomes**.

- How patients manage their health is often more important than the actual medical care that they receive.
- Most patients need assistance in learning how to manage their health:
 - Information on healthy lifestyle including diet, exercise, immunizations, regular preventative screenings.
 - Learning how to prevent and manage chronic diseases such as diabetes and hypertension.
 - Assistance with maintaining dignity and independence when the end of life is imminent.



5

WHAT IS THE PROVIDER'S ROLE?



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

Working in partnership with the patient
utilizing collaborative decision-making



- ✓ Information sharing
- ✓ Skills building
- ✓ Confidence building
- ✓ Providing tools to the patient
- ✓ Goal setting

HOW CAN HIT HELP?



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

Electronic Health Records, specifically the Patient Portal component, have a key role in promoting patient engagement.

- Provides access to medical record/medication list
- Facilitates access to information on conditions
- Reminders for daily care
- Possibility of appointment scheduling
- Online access to test results



MEANINGFUL USE

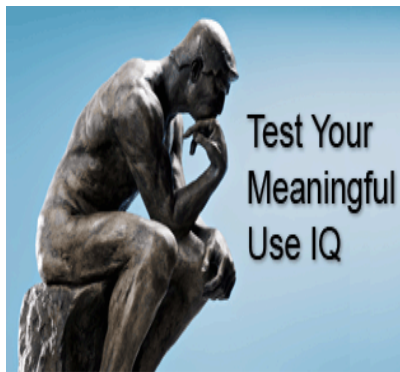


Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

Core 7 – Patient Electronic Access aka “Patient Portal”

Provide Patients the ability to view online, download, and transmit their health information within 4 business days

- More than 50% of patients have health information available within 4 business days. Provider may decide to withhold information
- More than 5% of patients view, download or send their health information to a third party during the reporting period



Core 17 – Use Secure Electronic Messaging

Use secure electronic messaging to communicate with patients

- More than 5% of patients (or their authorized representatives) send a secure message to their provider
 - Using messaging function of EHR
 - Provider does not have to personally respond
 - Provider/staff may decide follow-up call or office visit is more appropriate as an answer

These two core measures require patient engagement and participation.

PATIENT CENTERED MEDICAL HOME



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan



PCMH 1 : Enhanced Access & Continuity

- Clinical Advice by telephone and messaging
- Electronic Access to medical record
- Culturally and linguistically appropriate care
- The practice team (care coordination)

PCMH 2: Identify and Manage Patient Populations

- Health Assessment
- Data for Population Management

**Each of the PCMH standards represents an opportunity
for patient engagement and crosses over to the
Meaningful Use**

PATIENT CENTERED MEDICAL HOME



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan



PCMH 3: Plan and Manage Care

- High risk patient identification
- Care management
- Resources

PCMH 4: Self Care Support and Community Resource

- Self Care Process
- Referrals to Community Resources

PCMH 5: Track & Coordinate Care

- Coordinate with Facilities and Manage Care Transition

PCMH 6: Measure and Improve Performance

- Patient /Family experience

**Each of the PCMH standards represents an opportunity
for patient engagement**



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

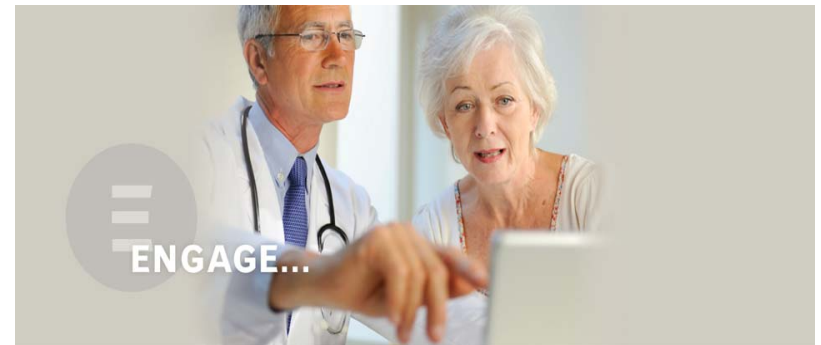
PATIENT ENGAGEMENT STRATEGIES



WHERE DO I BEGIN?

Every interaction is patient engagement

- Meaningful Use
- Patient Centered Medical Homes
- Practice Design and Delivery of Care Model
- Provider-Staff Behavior
- Provider-Patient Interactions
- Disease Self Management
- Technology Strategies





Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan



PATIENT
RESPONSIBILITIES

PATIENT ENGAGEMENT MODEL (CENTER FOR ADVANCING HEALTH)

Patient Responsibilities:

1. Find safe, decent care
2. Communicate with healthcare professionals
3. Organize healthcare
4. Pay for healthcare
5. Make good treatment decisions
6. Participate in treatment
7. Promote health
8. Get preventative healthcare
9. Plan for the end of life
10. Seek health knowledge



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan



BEST PRACTICE STRATEGIES

- Define your office care delivery model
- Clarify roles
- Assign a care team to the roles
- Assess patient opportunities
- Build a **self management** program around a selected patient population
- Select or create tools
- Address workflow and EHR use
- Outline pre and post encounter activities by role

PATIENT SELF MANAGEMENT PROGRAM

- ✓ Organizes the team around the patient to empower and prepare patients to manager their own health
- ✓ Patient centered and directive
- ✓ Team based model
- ✓ Incorporates patient self care
- ✓ Population health



WHAT IS PATIENT SELF MANAGEMENT?



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan



- Facilitating care outcomes through daily decisions about diet, exercise, medications and preventative strategies
- Self management organizes the team around the patient to empower and prepare patients to manage their health
- Effective strategies include assessment, goal-setting, action planning, problem-solving and follow-up
- Internal and community resources are critical to provide ongoing self-management support
- Patient education is used strategically

5 A'S TO SUPPORT SELF MANAGEMENT



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

- **Assessment** – knowledge, beliefs and behavior
- **Advise** should be linked to scientific evidence, not provider biases
- **Agree** on goals that are important to patients/families and actions to reach them
- **Assist** by identifying barriers and problem-solving to deal with them
- **Arrange** a specific follow-up plan which includes utilizing internal and community resources





HOW DO I IDENTIFY OPPORTUNITIES FOR PATIENT ENGAGEMENT?

- Quality Data:
 - How well do our patients manage their care?
- Operational Key Results Metrics
 - What is the no show rate for this population?
 - How can we affect it?
- Patient Satisfaction Surveys/Complaint Process
 - How often do these patients complain and about what?
- What available methods of communication may work for this population (email, text, face time)?
- What are all the care options available to this population (group visits, clinics, community services)?

NEXT STEPS

Create your patient engagement strategy

- ✓ Set your strategic direction/goals
- ✓ Define your performance measures
 - ✓ Set achievable milestones
- ✓ Create reports and analyze
- ✓ Review progress over time
 - ✓ Coordinate patient satisfaction and clinician feedback to improve processes over time
- ✓ Use MU or PCMH as your guide





Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

PATIENT PORTAL



20



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

The New Patient Portal

View test results and recent
medical records at the
click of a button.



[Learn More >>](#)

STEP 1: DETERMINE PORTAL SCOPE

- All patients, or a subset?
- All providers, or a pilot program?
- What languages are available?
- All at once, or roll it out over several months?
- Where do we start?



STEP 2: PATIENT ELECTRONIC ACCESS

- Do our patients have access to the internet?
- To what degree do patients have laptops, smart phones and other devices?
- Do our patients have email addresses?
- How many patients in our practice are interested in accessing their information electronically?
- What is patient receptivity to text messaging, face time or email?

STEP 3: TERMS OF USE



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan



Authorization

- Who is authorized to use the portal?
- How/when can a patient change the authorization?
- Can this all fit on one friendly page?
- Must the patient sign a document, or just click?

Potential Uses

- What can patients request or do?
 - Appointments, med refills, info from care team
 - View/download medical records, lab results, care plan, new patient packet
- Who is responsible for posting or replying? What is the response time?
- Privacy – aging parent, minor (13-18 yrs), populations
- When to post vs. calling patient vs. recall for visit. Who decides?

STEP 4: ENROLLMENT



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan



- ❑ Determine who enrolls patient and explains the access rights and privacy choices
- ❑ Collect patient email addresses
- ❑ Who individualizes the portal accounts?
 - ❑ Clicks boxes on the template per patient/provider choices
- ❑ Who trains the patient on how to access and use the portal?
- ❑ What is the plan for ongoing patient enrollment, education and usage tracking?



STEP 5: ONGOING SUPPORT

- ❑ Who supports portal operations?
 - ❑ Troubleshooting, explanations, help with access
- ❑ How is the support provided?
 - ❑ By email, phone, or during visits
- ❑ What is the workflow to handle various patient requests?
 - ❑ Scheduler, care team member, provider
- ❑ Who manages security?
- ❑ How does the care team reinforce use on every visit as part of self-management or care plan progress?



Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

STEP 6: PORTAL PROMOTIONS

- ❑ Staff and providers to remind patients to access portal for requested information
 - ❑ Access to medical records/test results
 - ❑ Written communication with provider
- ❑ Pamphlets/posters/fliers
- ❑ Slide shows/videos in the waiting room
- ❑ Phone “on hold” messaging
- ❑ Enrollment kiosk at check in/check out

NEXT STEPS

- ❑ Build a patient engagement strategy that furthers chronic disease management priorities and accomplishes compliance with MU Stage 2 and PCMH
- ❑ Incorporate techniques to leverage patient visits to meet portal and patient messaging thresholds
- ❑ Test the impact of new methods of communication on patient achievement of self management goals and improved outcomes for chronic disease.





Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

Questions?





Sponsored by Riverside County Medical Association,
San Bernardino County Medical Society,
Inland Empire Health Plan

Contact Us:

Natalie Martin, Natalie.martin@objecthealth.com, 858-602-2853
Val Tuerk, Val.tuerk@objecthealth.com 949-702-0517
www.objecthealth.com

Kathy Thunholm, kthunholm@ieehrc.org, 951-686-1825

Past Presentations Available at www.ieehrc.org