



Patient Engagement

Let's make engaging patients worth doing.

By James Geyer, MD and Jenna Cooper, CRNP



Patient engagement has been a catchphrase for several years now. Much like humpty dumpty after falling off the wall or the elephant being “viewed” by the 6 blind men, patient

engagement has been split into many separate ideas—each given different priorities and emphasis by different stakeholders and organizations. If, instead, we could gather the pieces together and return to the whole egg or true elephant in the room, we'd find that engaging our patients can solve numerous problems simultaneously. Effective patient and caregiver engagement can avert medical, social, and legal problems before they arise.

By the very nature of our work, practicing physicians know we have been engaging patients for years. That doesn't mean, however, that the modern evolution of patient engagement has to be a painful process of dubious merit. Instead, it means we are already in a strong position to leverage technology and communication to enhance care, improve patient and caregiver understanding, increase satisfaction with care, and maintain or recapture a healthy patient-physician relationship by helping patients become active participants in their own care.

Patient satisfaction plays an important role in assessing quality of care, but it shouldn't be the end-all-be-all. Regardless of how much education and attention is provided, many aspects of optimal medical care are too complex for the uninitiated. This doesn't mean we ignore patient education, engagement, and satisfaction. It does mean we have to be smart about how and what we communicate, taking the individual patient's current burden of disease, burden of care, knowledge, and self-knowledge into account in our interactions.

Patient, caregiver, and care team involvement needs to be a value-added service, and it must be cost effective. An actual roadmap for the process of patient engagement

would help. A cheap and easy roadmap would be even better, because a program that is too complex or too expensive to implement is counterproductive.

The Fractured Present

The initial focus of patient engagement was to enhance patient care. Many patient-engagement proposals are laudable but impractical for general adoption. Others give vague and nebulous goals with lofty expectations and little hope of real impact. Although several recent suggestions with important and achievable goals have surfaced, we lack formal meaningful guidance for instituting a patient-engagement program that successfully improves patient care in an easily adaptable and cost-effective fashion.

Advocacy groups promote patient interests and caregiver needs. This should always be at the forefront of our thinking. The practice of medicine should be a team sport. We often aggressively treat a medical disorder, unaware that the patient's desires and caregivers' needs may not always align with the treatment plan or the practice parameter being followed. Taking the time to listen actively (See our blog on Leadership Requires Effective Active Listening <https://www.smartbusinessgreatmedicine.com/leadership-requires-effective-active-listening/>) is a great starting point.

Some consultants promote patient engagement as a means of enhancing referrals or improving a social media presence. In the 21st century, improving your online presence and reputation can be important.

Patient portals are most associated with patient engagement today, and these are important tools that can give patients timely laboratory and test results, the ability to obtain and review their own medical records, obtain records, and options for communicating with the physician or staff. Simply having these capabilities does not create meaningful engagement. Maximum use of the patient portal improves the status of some chronic conditions. Unfortunately, the exact mechanisms for patient buy in,



staff buy in, and use of the portal are not well delineated. Truly optimized and focused use of the portal are even more elusive goals.

True Patient Engagement Begins in Person

Before we start any type of digital communication strategy, we need to engage patients in person. During a visit, we provide health guidance and layout a plan for the patient's care. In many cases, there is limited interaction or follow-up between visits. The patient is often advised to call the office if problems or concerns arise. This leaves the burden on the patient and does not express the physician's true level of concern for the individual.

At the end of a visit, in addition to telling patients to call if they have problems, we should stress the importance of communication and the potential benefits of using portals and other forms of digital communication. This builds a foundation for building a digital communications strategy that not only satisfies government requirements but more importantly, provides mechanisms for better management, better communication, improved patient satisfaction, and improved word-of-mouth advertising. Remember the adage "People don't care how much you know, until they know how much you care." Make it about relationships, not technology. During the visit and at checkout, a patient's upcoming communications should be arranged. If his or her patient portal account is not already functional, the account should be created and activated before the patient leaves the office. An initial message should be sent, and the patient should be given instructions on its use. Don't leave this to chance. Make sure the system works correctly, the patient understands the protocol, and most importantly, stress that using it is about your commitment to improving the patient's quality of life. This shows the patients that you care about them as individuals and that you are trying to improve their health as much as possible.

Test results are another opportunity to use the patient portal to improve patient engagement. For example, at the end of many visits, some standard labs are ordered, and the patient is reminded that they can see their results on the recently installed patient portal. Unfortunately, the system has not been customized to delay test notification/access so that the labs can be reviewed by the physician and appropriately interpreted. This results in frequent calls from concerned patients about unimportant laboratory findings. When a physician instead reviews the labs and attaches a simple explanation to the notification, the patient can avoid unnecessary worry, the office would have fewer phone calls, and the physician and staff would have more accurately expressed their degree of concern for the patient.

Meaningful Use

Why should we settle for having a patient portal that simply allows patients to check results or leave messages? We all deserve a system that enhances care and improves peoples' involvement in their own health care. Adoption of patient portals and other digital engagement systems has lagged behind the lofty predictions. We need to change this. Many tools are already available and can be leveraged to yield improvements in patient care, preventative health, reduction in health-related stress, and improvements in business practices.

We should leverage multiple platforms and approaches to create an effective collaboration (Figure). The process begins with a discussion between the physician and the patient outlining the importance of a collaborative effort. Establish the steps that will occur and what the patient will gain using this system. This should be echoed by staff to reinforce the importance. The patient portal and associated email and text systems should play an important role in the patient engagement effort. Also, don't neglect the phone, the practice website, and other social media outlets.

Effective patient engagement strategies include checking on efficacy of treatment and potential side effects after a management intervention, sending reminders about health maintenance activities, notifications about events of interest, and preparations for upcoming clinic

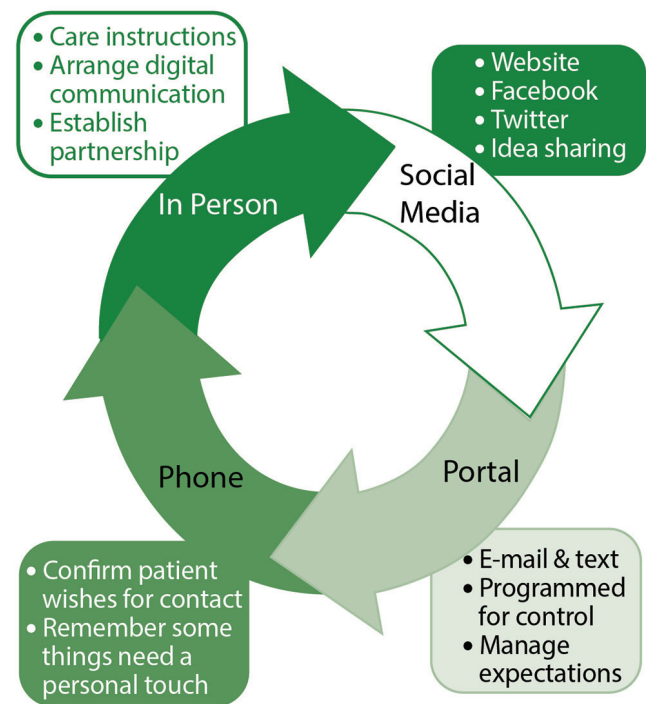


Figure. A carefully crafted approach to patient engagement uses all available methods of communication.



visits. A carefully crafted approach to using all the available components can yield real results without overwhelming the physician and staff with messages and busy-work. We can't afford more of either.

The Promise

During the clinic visit, a new medication is prescribed for treatment of an elevated cholesterol level. The physician reviews the appropriate drug administration, common side effects associated with that particular drug, and reminds the patient to call if any side effects occur. Most patients are overwhelmed by the volume of information provided during even the most focused medical interaction. Using a proprietary communications system integrated into the note, a message can be sent to the patient with a list of the common side effects. This can help focus the patient and limit searching through online sources of questionable validity. Simultaneously, the system can be set to send a timed reminder to the patient when follow-up laboratory testing is due. This approach not only documents the treatment plan but also initiates the plan and arranges intermediate follow-up care during the office visit. The physician-patient interactions are focused and require only simple selected answers. Negative responses would require no further intervention. Problems or side effects could be addressed early in the course before severe complications arise.

Streamlining and Enhancing Care

A common visit for a person with dementia entails a caregiver listing the medications and providing interval history while trying to interact with the patient to maintain a calm demeanor. All too often, some medications or details of a changing health status are forgotten. Being able to provide this information as an update in the week before a visit will result in much more accurate information. The caregiver can also be asked about information pertinent to coordinating comprehensive care.

Shortening and focusing the time in the office in this manner accomplishes multiple goals. It can decrease patient stress and confusion, create the framework needed to improve the transmission of information to the family, and provide the opportunity to answer the questions that the patient and caregiver(s) deem most important. It also gives the physician the chance to guide the conversation towards important topics that the caregiver may not recognize.

During a focused visit, messages about and links to adult care, sitting services, and other programs that could assist the caregiver can be sent to the caregiver's email. Intermittent informational messages about a person's condition, helpful hints, and news of interest can also both help the caregiver and provide some support.

System-Level Engagement

The interactions described above provide a marked improvement in care and serves to enhance the image of the physician and practice. Why stop there? Social media including integrated Facebook, Twitter, Instagram, and more can be used with the office website to push out important educational content. It can also serve as the hub for calls to action on various legislative actions, announcements for upcoming activities, and helpful hints and tips from patients to help and support other patients. This level of engagement can truly build a team and community spirit that involves everyone, including the physician, office staff, patient, caregivers, support groups, and other interested parties. Creating a pathway that enables patients to help each other can be very gratifying to everyone involved.

Enlisting a trusted group of patients and caregivers as engagement advisors can garner excellent ideas for patient engagement. This can be used in practice advertising through the practice media platforms and local media.

Marching Orders

Don't settle for a simple patient engagement system just to fulfill a mandate. Implement a program that improves care, enhances the practice image, grows your revenue, and improves population health. Leverage multiple technologies but don't neglect the face-to-face engagement that sets the tone for the entire program. This is not something only the large health systems can accomplish. With careful planning, a relatively small amount of effort, and a very small investment of time and money, any practice can field a multifaceted patient-engagement program. When implemented correctly, this system will more than pay for itself both medically and financially. ■

James Geyer, MD

Cofounder, Smart Business Great Medicine
www.smartbusinessgreatmedicine.com
Alabama Neurology and Sleep Medicine
Tuscaloosa, AL

Jenna Cooper, CRNP

Alabama Neurology and Sleep Medicine
Tuscaloosa, AL