5 Elements of a Successful Patient Engagement Strategy
Executive Summary

In recent years, there has been a great deal of discussion about how to engage patients in their care. Patient engagement has always been considered a good thing in practices and health care organizations. Today it is vital to the business of delivering care.

Why the shift? Patient engagement is an essential strategy for achieving the “triple aim” of health care:

- **Improving the patient experience.** Patients are expecting and demanding greater control over their care. Provisions in the Affordable Care Act now link performance related to patient experience metrics to reimbursement. For the first time, health care organizations—and eventually individual providers—will be paid partly based on how they are rated by patients.

- **Advancing population health.** Today, health care practices must meet new industry standards that emphasize outcomes instead of services delivered. Practices are on the hook for achieving better cost and clinical outcomes with initiatives such as Meaningful Use, Patient-Centered Medical Homes (PCMH), and Accountable Care Organizations (ACOs).

- **Reducing costs.** Focusing on patient engagement can improve efficiency, reduce out-migration and reduce overall costs of patient care.

There are many definitions of the term “patient engagement.” However, true patient engagement is not just patient communication or education, nor is it simply implementing online patient portals.

True patient engagement refers to:

1) The knowledge, skills, ability, and willingness of patients to manage their own and family members’ health and care;

2) The culture of the health care organization that prioritizes and supports patient engagement; and

3) The active collaboration between patients and providers to design, manage and achieve positive health outcomes.

To successfully achieve patient engagement in your health care practice, consider these five elements:

1) Define your organization’s vision for patient engagement.

2) Create a culture of engagement.

3) Employ the right technology and services.

4) Empower patients to become collaborators in their care.

5) Chart progress and be ready to change and adapt.
Patient Engagement Now

Patient engagement has always been a good thing to strive for in health care practices. Today, however, patient engagement is an essential strategy for achieving what the Institute for Healthcare Improvement calls the “triple aim” of health care: improving the experience of care, improving the health of populations, and reducing per capita costs of health care. Specifically, patient engagement can help health care practices:

“If patient engagement were a drug, it would be the blockbuster drug of the century and malpractice not to use it.”
—Leonard Kish on August 28, 2012
www.hl7standards.com/blog/2012/08/28/drug-of-the-century/

Improve the patient experience. The Affordable Care Act links reimbursement to performance on patient experience metrics. For the first time, health care practices—and eventually individual providers—will be paid partly based on how patients rate them. For example, the Medicare Shared Savings Program includes 33 individual measures to assess the care provided by Accountable Care Organizations (ACOs). Of these, seven are related to the patient’s or caregiver’s experience of care, and they have equal weight with others related to care coordination and patient safety, preventive health, and at-risk populations. A recent survey by the California HealthCare Foundation found that patients pay more attention and become more engaged in their health and medical care when they have easy access to their health information online; this is especially true for patients with lower incomes. However, there is a dramatic gap between what patients want and what they actually experience:

• 80% of Americans who have access to the information in their electronic health records use it, a full two-thirds of those who don’t yet have electronic access say they want it.
• 41% of U.S. consumers would be willing to switch doctors to gain online access to their own electronic medical records.
• Only about 20% of U.S. adults currently have access to their medical records.

A Harris poll conducted in 2012 found that 75% of patients want access to their medical records.

While patient experience and patient engagement are linked, they are not the same thing. Engaged patients maintain a stronger attachment to their medical practices, and experience greater value, trust and quality
in their care—which lead to greater satisfaction and empowerment and an improved patient experience. And patient satisfaction is the number one priority for health care executives, according to the HealthLeaders Media Industry Survey 2013—above clinical quality, cost reduction, and many other issues.6

Meet new industry standards, with incentives for those who succeed and penalties for those who don’t. Patient engagement is a goal of major health care reform initiatives including Meaningful Use, Patient-Centered Medical Homes (PCMH), and Accountable Care Organizations (ACOs). In 2014, Meaningful Use Stage 2 will require providers to enable patients to view online, download and transmit their health information. Providers must also use secure electronic messaging to communicate with patients. Failure to meet these measures will result in penalties; practices that achieve the threshold for these measures will be eligible for incentives.

Reduce costs. Focusing on patient engagement, including the use of online portals, improves efficiency, reduces out-migration and can reduce the costs of care. A growing body of evidence demonstrates that patients who are more actively involved in their health care experience better health outcomes and have lower per capita costs compared to patients who are less engaged.7 Health care practices with a strong patient engagement strategy report increased efficiency, especially with the use of online portals for self-service.

Figure 2. Technology Use is Evolving
Recent surveys from the Pew Research Center indicate that a majority of U.S. adults use technology to engage in their health care:

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Action</th>
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<tbody>
<tr>
<td>63%</td>
<td>of adult cell owners use their phones to go online</td>
</tr>
<tr>
<td></td>
<td>• Has doubled since 2009</td>
</tr>
<tr>
<td></td>
<td>• 34% mostly go online using their cell phone</td>
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<td></td>
<td>• 21% do most of their online browsing using their mobile phone—and not some other device such as a desktop or laptop computer</td>
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<tr>
<td>69%</td>
<td>of U.S. adults track a health indicator like weight, diet, exercise routine or symptom</td>
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<tr>
<td></td>
<td>• Half track “in their heads”</td>
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<tr>
<td></td>
<td>• One-third keep notes on paper</td>
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<tr>
<td></td>
<td>• One in five use technology to keep tabs on their health status</td>
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<tr>
<td>35%</td>
<td>of U.S. adults have gone online to figure out a medical condition</td>
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<tr>
<td></td>
<td>• Of these, half followed up with a visit to a medical professional</td>
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<tr>
<td>39%</td>
<td>of U.S. adults provide care for a loved one</td>
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<td></td>
<td>• Up from 30% in 2010</td>
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<tr>
<td></td>
<td>• Many navigate health care with the help of technology</td>
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</table>

Source: Pew Research Center
5 Elements of a Successful Patient Engagement Strategy

check-in, automated appointment reminder and lab result services, and online and after-hours options for bill payment. Telephone volume decreases when secure messaging is introduced. And portal use can lower indirect and direct labor costs, such as mailing costs for lab results, online billing questions versus telephone, online appointment scheduling, and online appointment reminders.8

A growing body of evidence demonstrates that patients who are more actively involved in their health care experience better health outcomes and incur lower costs.

Source: Health Affairs/Robert Wood Johnson Foundation, 2013

Figure 3. Patient engagement is active collaboration between patients and providers

Elements of Patient Engagement

Organizations use the term “patient engagement” to mean anything from patient communication to online portals. However, true patient engagement is not simply patient communication or education; nor is it just implementing new technology.

Patient engagement refers to:

1) The knowledge, skills, ability, and willingness of patients to manage their own health care,

2) The culture of the health care practice that prioritizes and supports patient engagement; and

3) The active collaboration between patients and providers to design, manage and achieve health outcomes.
Achieve Success with Patient Engagement

To successfully engage your patients, consider these five steps.

1) Define your organization’s vision for patient engagement.

First, understand where you are and where you want to be in terms of patient engagement. Discuss what patient and family engagement means to your senior leadership, board, staff, patients and their families. With these discussions, you can work with the definition of engagement presented here or generate your own custom definition.

Create an “end state” vision of what your practice will look like when you have a strong patient engagement strategy in place.

Here is a sample end state vision for a typical practice:

The phone is quiet. Nobody is on hold. Patients flow in and out, having been reminded of their appointments electronically as well as by phone, having completed check-in paperwork before arriving, and leaving with prescriptions already submitted during the exam. There is no clacking printer spitting out lab results that will have to be put into envelopes for mailing. There are no phone messages piling up for providers, because most patient messages arrive via secure messaging and nurses have already prepared answers for most of them. At the end of the day—or whenever it’s convenient for them—providers can review the prepared messages and send them on with a click. Patients are prepared and informed. They do better following their care plans, which they can access online. Patient retention is up; days in accounts receivable are down; and you have met your patient engagement requirements for Meaningful Use Stage 2. Everyone works less, gets more done, and all with better financial and clinical results.

You may want to create several end state visions for different specialties, departments or practices. Next, develop goals and expected outcomes based on your patient engagement vision. Keep in mind that to fully engage patients and families, health care practices must plan for change at multiple levels:

- **At the individual level,** individuals and families should be encouraged and supported to be active participants in care and decision making.

- **At the health care team level,** the health care team should be prepared and supported for collaboration with patients, families and other members of the care team.

- **At the organizational level,** assign accountability, encourage partnerships and integrate the patient and family perspective into all aspects of strategic planning, implementation and evaluation of programs and services.9

Do older patients use new technology? Studies say yes.

- The 2013 Accenture Consumer Survey on Patient Engagement showed that at least three-fourths of Medicare recipients access the Internet at least once a day for email (91%) or to conduct online searches (73%) and a third access social media sites at least once a week.

- It also reported that 67% of Americans 65 and older say that accessing their medical information online is very or somewhat important, and 83% of U.S. seniors think that they should have full access to their electronic health records but only 28% actually do.

- In an AMA study, patients over 65 adopted portals at a rate greater than patients aged 18-35.

- The Pew Internet & American Life Project shows Internet use between 2000 and 2012 tripled for those 65 and older and doubled among those 50 to 64 years old.


Consider the resources you will need to support your patient engagement vision, including time and staff for planning, a patient portal with secure messaging, and other patient communication services such as live operator support and the ability to create automated calls and emails for appointment reminders and lab result delivery. When selecting and implementing new technology, consider input from physicians, nurses, medical assistants, administrators and other staff who will be using the technology on a daily basis. Make sure their needs are met and concerns addressed. Input from patients via focus groups, advisory panels, surveys, and usability trials are also important for successful implementation.

Finally, use your patient engagement vision to set achievable targets and ways to measure progress. For example, one metric could track patient portal adoption (i.e., we are currently at X% portal adoption and want to get to XX% in X months).

2) Create a culture of engagement.

Getting practice-wide support is critical for successful patient engagement, but it doesn’t have to be hard. When your practice’s leadership, staff, providers and patients have been involved in creating the patient engagement vision, they are more likely to be enthusiastic about implementing it. Rely on policies and procedures when moving forward with patient engagement. Be prepared with—and communicate often—the benefits of patient engagement for patients, staff and providers. Here are some additional tips for getting buy-in for patient engagement activities from front-line staff and providers.

To make sure staff are on-board with patient engagement:

• Make clear that staff are valued and critical to successful patient engagement.
• Explain why patient engagement is important to the practice: it is an opportunity to improve care delivery and the patient experience, increase revenue, see more patients, and take on new tasks and responsibilities.
• Make sure staff are comfortable with the tasks they’ll have to complete.
• Make a clear, enforceable policy around completing those tasks, but also add some fun to the process with rewards and recognition.
• Address any concerns that technology will replace them. Help them understand how patient engagement will decrease monotonous tasks so they can focus on more important work.

To get support from providers:

• Make sure providers understand the benefits of patient engagement for themselves, for patients, and for the practice, including meeting Meaningful Use Stage 2 requirements.
• Ease concerns that patient messaging requires more clinical time—in fact, secure messaging actually reduces clinical time compared to phone calls.
• Make sure providers are comfortable with the tasks they’ll have to complete.
• Address concerns about older patient adoption of new technology. Research consistently shows that patients aged 65 and over use the Internet regularly and are comfortable using patient portals to access medical records online.
• Consider provider competition for portal adoption rates.

What to Look for in a Patient Portal

User-friendly features, including online bill pay, secure messaging, and patient registration

- Built and branded for your practice with flexibility to add and customize features
- The right balance of online, live and automated services
- Compliant with new mandates, including ICD-10 and Stage 2 Meaningful Use, at no additional cost
- Integration with your medical billing and EMR systems
- Low up-front costs and low financial risk
- Easy, continuous upgrades
- Excellent support
3) Employ the right technology and services.

Having the right technology and services is key to successful patient engagement. Patient portals can enhance patient-provider communication and enable patients to check test results, refill prescriptions, review their medical record, and view education materials. Patient portals can streamline administrative tasks such as registration, scheduling appointments, and patient reminders. They allow practices to generate electronic statements and facilitate online payments. In addition, a patient portal that supports live operator and automated messaging can foster better patient retention and loyalty in the face of increasing competition. Together, technology and patient communication services can help satisfy patients who demand convenient, 24/7 access to their health information, and can increase revenue with more efficient self-pay collections and incentive payments for meeting Meaningful Use Stage 2 requirements.

Ideally, look for a patient portal solution that can be seamlessly connected to your EHR, billing and practice management systems. Here are other important considerations when choosing the best patient portal for your practice:

- **Cloud-based services and software.** Cloud-based portals offer the most cost-effective, flexible and robust solutions for health care practices creating patient engagement strategies. A cloud-based services vendor offers a combination of software, networked knowledge and back office support with low up-front costs. This kind of solution gives users immediate access to new features and functionality that are regularly added to the system. It can also quickly adapt to new patient engagement initiatives and other changes as they come.

- **An integrated patient communications platform.** Consider patient portal solutions that offer a full range of integrated patient communication services such as live operator support and automated phone, text and email reminders. A fully integrated patient communication system can offer practices automated appointment and bill reminder services, and can provide secure messaging in the patient’s preferred format. Practices can free up valuable staff time by using widely accepted automated calls, emails, and text messages to specific patient groups. Automated, secure messaging can be used as a medical appointment reminder, to deliver test results, remind patients of a medication schedule, alert them in the event of a weather closure, or promote an upcoming immunization clinic or other population health event. In addition, live operator services, including after hours answering services, can improve a practice’s schedule density, office efficiency, and self-pay collections rate by handling overflow calls during peak hours and offering live operator support to patients after business hours.

- **Compliance with HIPAA and Meaningful Use mandates.** Patient portals are relatively new in the health care industry, so few patient portal solutions have been built and tested over time. As a result, many legacy patient portals do not meet new standards for HIPAA-compliant, secure messaging. Meaningful Use Stage 2 focuses on measuring patient engagement and empowerment, which means that patients not only need to access their health information, but also view it, download it, or transmit it—that is, patients need to actively engage with their health records. That means health care facilities need to provide secure, HIPAA compliant messaging between patients and providers in order to meet Meaningful Use Stage 2 criteria.

When implementing a patient portal, work with your vendor to ensure that appropriate privacy and security safeguards are put in place. For example, it is important to make sure that patients who access a portal are who they say they are, including unique user IDs and passwords and potentially two-factor authentication [for example, a code being sent to a cell phone in addition to a password]. Patients should also be educated on appropriate use of the portal and the importance of safeguarding their log-in credentials as well as where they store any information they download or print. Consider working with a solution that offers flexible, continuously updated software that is supported by back-office experts in order to keep the patient portal current with future mandates as they evolve.

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We have a patient portal. Isn’t that enough?

A patient portal can benefit patients and providers by enhancing patient access and increasing administrative efficiency and productivity. However, without adequate features, promotion and use, a patient portal won’t help anyone. Make sure providers and staff are on board with portal selection and use. Ensure the portal meets industry mandates for security, interacts seamlessly with your EHR system and can be customized for your practice. Promote the portal to patients. Track and celebrate portal milestones such as a certain number of emails collected or time saved from having patients fill out forms electronically.
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4) Empower patients to become collaborators in their care.

What does an engaged patient look like at your practice? Develop your own definition of an engaged patient. It might include patient characteristics such as:

- Seeking health information and knowledge
- Adhering to treatment plans and medication regimens
- Participating in shared decision making
- Using online personal health records
- Engaging in wellness activities

Think about ways to incorporate regular patient input to inform and refine patient engagement efforts. Patient input could include:

- Short surveys eliciting the values, goals and needs of patients and families
- Opportunities to hear patients and family members describe their perspective of the care experience
- Involving patients and families in process improvement, redesign work and/or committees
- Working with patients and families in difficult situations

Having patients use your portal is an important component of patient engagement. Considering your patients' preferences, here are some ideas for helping engage patients with your portal:

- Promote the portal to existing patients and with new patients as they come on board. Make the benefits of using the portal clear, and provide incentives for patients to use it.
- Ask providers to talk with patients about how the portal can improve their experience.
- If necessary, walk patients through logging onto the portal, and show them how to do tasks they do regularly.
- When someone calls to do a task that they could do on the portal, walk them through it using the patient portal and encourage them to try it next time.
- Try to understand and address any hesitancy or concerns with using the portal.
- Rely on the patient portal for as much of your communication to patients as you can. The more you use it, the more they will too.
- Accept that some patients will not use the portal. Make sure it is consistently an option so they have opportunities to change their mind.

5) Chart progress and be ready to change and adapt.

Use your patient engagement vision to set achievable targets and ways to measure progress. Depending on your vision, your practice may want to track metrics such as patients’ understanding of how a given intervention is going to help with health goals, how patients are using technology to progress towards health goals, and any changes in confidence in managing their own health. At minimum, consider monitoring how many patients have signed up to use your patient portal, how many emails have been collected, or how often patients connect

Tips for implementing a new portal:

- Advertise the portal by posting signs, using telephone on-hold messages, distributing flyers and letters to patients, and staff wearing buttons to promote patient portal adoption.
- Make it everyone's job to encourage using the portal, from front-desk and telephone staff to physicians. Develop talking points for staff that encourage patients to sign up and use the portal.
- Develop policies and procedures for response times for messages and systems for routing and responding to messages.
- Phase in the portal rollout by pilot testing it with a few physicians or clinical sites first. Start by activating a few features and rollout new features over time.
- Minimize potential loss of patient interest by simplifying the registration process. Try bulk enrollment or having patients register at kiosks in the clinic. Designate staff to assist patients and troubleshoot.
- Educate patients about what kinds of communication are appropriate via the portal, how and when providers will use messaging, and when to check the portal for lab results.

Source: National Learning Consortium Fact Sheet
August 2012
4 Myths of Patient Engagement

**Myth #1. Patient engagement doesn’t have to be a top priority now.**

**Reality:** Patient engagement is a goal of several major health reform initiatives now—with rewards for those who succeed and penalties for those who don’t. Without a plan for meaningfully engaging patients, you could be penalized for failing to meet Meaningful Use Stage 2 guidelines. You could miss the boat on preparing for accountable care, Patient-Centered Medical Homes, and managing population health. What’s more, your patients will choose to go to other practices where they can securely view online and transmit records, and get the convenience and access to care they are demanding. It can take months to implement effective patient engagement strategies, so start now.

**Myth #2. Older patients won’t use an online patient portal.**

**Reality:** 67% of Americans 65 and older say that accessing their medical information online is very or somewhat important. 83% of U.S. seniors think that they should have full access to their electronic health records but only 28% actually do. In an AMA study, patients over 65 adopted portals at a rate greater than patients aged 18-35. And Internet use between 2000 and 2012 tripled for those 65 and older and doubled among those 50 to 64 years old.


**Myth #3. Sharing medical information with patients will add to provider workload.**

**Reality:** Giving patients access to their health records, lab results and progress notes does not mean providers will handle an influx of inquiries from confused patients. Rather, providers report increased efficiency and appreciate being able to respond to patients at their convenience. Evaluation studies find that telephone volume decreases when secure messaging is introduced. Studies also find that the communication content of patient messages tends to be appropriate, addressing non-urgent care issues. Portal features have been found to provide cost savings by decreasing indirect and direct labor costs, such as mailing costs for lab results, online billing questions versus telephone, online appointment scheduling, and online appointment reminders. Keep in mind that best practices suggest educating patients about when and how to use secure messaging, and to provide a brief explanation when posting test results along with guidance for any follow-up.


**Myth #4. Lower income patients won’t be able to use online patient information.**

**Reality:** Despite perceptions that lower income populations lack access to reliable Internet connections, a new study reports that a large majority of low income, underserved, and safety net patients want to communicate with their providers using email, text messaging, and online patient portals. In fact, 60% of lower income patients in the study reported using email regularly, 54% said they obtained general research information from the Internet, and 78% expressed interest in electronic communications with health care services. Digital disparities do exist among racial and ethnic minorities, the physically disabled, lower-income, and those with limited English proficiency. But used with appropriate outreach strategies, health information technology (HIT) such as patient portals can offer important tools to improve the quality and efficiency of care across at-risk and traditionally underserved populations.

with your providers and staff through the portal. To encourage continued success, establish a rewards or recognition system for providers and staff. This could reward a team or person based on goals reached.

It may take time to see outcomes in patient engagement. Patients who have adopted the patient portal may not have another interaction with the office for some time after they sign up. You will probably first see a time savings from reporting lab results on the patient portal and answering messages instead of patient calls. Check in with everyone in the practice to review the adoption results and talk through what processes from your original plan are working and which are not. Ask for suggestions on how to improve the processes, and then integrate into your plan any new procedures that might be effective as well as adjusting any that are not working.

Next Steps in Patient Engagement

In today’s health care environment, patient engagement should be an essential component of every practice’s operations. Make sure you have the pieces in place to achieve meaningful patient engagement, including an organization-wide vision, buy-in from front-line providers and staff, and the right tools and technology.

If you haven’t yet formally considered patient engagement, start by enlisting your practice’s stakeholders in creating a vision for patient engagement. Work with patients, providers and staff on understanding potential barriers and addressing concerns. Determine how you will create a culture of engagement by relying on policies and procedures to appropriately encourage engagement on all levels of the practice.

If you already have a patient portal, work with your vendor to understand whether it will meet industry mandates for patient and provider use, security, and efficiency. It’s not too late to switch or add components to your patient communication technology. Changes can be disruptive, so make sure your vendor has a plan for transitioning and plan ahead so you do not fail to meet industry mandates such as Meaningful Use Stage 2.

Finally, make sure your patient engagement strategy and technology solutions are flexible enough to accommodate inevitable change. Consider patient engagement solutions that offer optional add-on components, such as live operator support and automated patient calls, emails and text, to enhance and customize your patient communication as needed. Cloud-based solutions can roll out changes and updates to everyone on the network simultaneously. Consider working with vendors that prioritize service and innovation, connectivity and partnerships, so that your practice benefits from both cutting-edge tools and long-term expertise in patient engagement solutions.

The athenahealth difference

athenahealth is a company focused on making health care work as it should. To us, patient engagement is a continuous process of collaboration between patients and providers that is essential to achieving the triple aim of health care. Our patient engagement model focuses on an integrated platform of customizable services for practices that help align incentives, build relationships and create efficient behaviors with the use of appropriate technology. We continue to introduce new services and accelerate the introduction of high-value innovation via the cloud to empower your patients—and your practice.

About athenahealth

athenahealth is a leading provider of cloud-based electronic health record (EHR), practice management, and care coordination services to medical groups and health systems. Our services were voted 2013 Best in KLAS Overall Software Vendor and Best in KLAS Physician Practice Vendor. Our mission is to be the most trusted service to medical care givers, helping them do well by doing the right thing. To learn how our services can help your practice, contact us at 866.817.5738 or athenahealth.com.

athenaOne®

athenaOne includes our Best in KLAS practice management and EHR services, plus a comprehensive patient communications solution. Our patient communication services go beyond traditional scheduling software, reaching out to patient populations to effectively close gaps in care. Your patients are better informed and engaged, while you experience improved efficiency and greater profitability with an average 8% reduction* in no-shows. Empower your patients—and your practice—with a practice-branded web portal voted #1 patient portal by KLAS. Everyone benefits: you boost patient satisfaction while streamlining operations and relieving staff from time-consuming work. We also offer automated messaging solutions based on your practice’s needs and your patients’ preferences. Now you have a more efficient, cost-effective way to enhance patient communication and keep schedule openings filled. With our cloud-based software, networked knowledge and back-office service teams that take on practices’ most burdensome work, athenaOne improves every step of the workflow. Providers stay up-to-date and prepared for every industry change, from ICD-10 to Stage 2 Meaningful Use.

* 2013 Best in KLAS Awards: Software & Services,” January, 2014. © 2014 KLAS Enterprises, LLC. All rights reserved. www.KLASresearch.com

** Based on a comparison of the highest no-show rate among clients with athenaCommunicator and the average rate for appointments without the service for the year ending September 30, 2012.
Endnotes


Notes
Notes
Notes
we connect care™

A leading provider of cloud-based services and mobile tools for medical groups and health systems. Our mission is to be the most trusted service to health care providers, helping them do well by doing the right thing.