

# Patient Engagement

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Patient engagement refers to a set of interventions to increase patient activation and healthy behaviors – typically through partnership with providers. Patients need to be engaged to learn what is important, what to do to manage their care and have the confidence to do it. To help, providers need to understand what the patient values, what their fears and barriers are, and provide the right tools and support. The focus changes to person-engagement instead of disease- or condition- engagement. According to the Center for Advancing Health, two thirds of adults do not feel they have the ability to master their own health. It is therefore up to providers to build trusting relationships, actively invite patients to participate in their care, and welcome their input.

The advantage to the practice is that engaged patients help manage their care and have improved health outcomes. Engaged patients take responsibility to think about the information they need and ask questions. They stay informed about their health, make daily decisions to manage their condition, such as staying active, eating a healthy diet, and getting preventive care screenings, labs, and immunizations. They learn about their medications and take them as prescribed, knowing what to watch for and who to contact if there is a problem.

We can think of patient in engagement as a series of steps.

## ➤ **Step 1. Patient Outreach.**

Practices are responsible for their entire patient panel – those who come in for care and those who do not. Identifying high-risk patients who have not been in for regular care enables outreach to those patients in greatest need of engagement. This strategy is particularly important for population health and value based contracting models. Finding and connecting with some patients can be complicated by inaccurate addresses or phone numbers, cultural and linguistic barriers, and limited practice staff available to outreach to patients in the community. To address some of these challenges, practices may consider exploring social media or contacting the patient's managed care organization to get updated demographic information. It may also be useful to consider incorporating community health workers into the care team or connecting with community-based organizations such as Health Homes, homeless shelters, or food pantries, along with developing warm hand-off processes back to the practice. Establishing data-sharing agreements to obtain access to timely, reliable data to find patients may also be useful.

## ➤ **Step 2. Develop a Trusting Relationship.**

Engaging with patients and developing a helpful, trusting relationship facilitates them sharing their thoughts and feelings and helps motivate them to want to make improvements in their life. Start where the patient is by identifying and meeting basic needs to help establish trust. Ask open ended questions to understand what's important to them. Critical listening skills are required. Explain your role and what you can do to support their health to set clear expectations. Explain the benefits of providing you with a signed consent in order to support your efforts to coordinate care between providers, especially in the event of an emergency.

## ➤ **Step 3. Clarify Communication Mechanics.**

Ask about communication preferences. Many patients are digital natives and may prefer patient portal access for routine communication while others may prefer texts. For more in-depth conversations, they may have preferences between in-person, video, or phone calls. If remote conversations are desired, explore the location that works best for them for privacy and verify that they the equipment and network bandwidth they need, as well as a working knowledge about how to log in and use your virtual platform. Be sure to discuss security, privacy, &

consent. At the conclusion of any visit – whether in-person or remote, ask if the process worked for them or if they have suggestions for improvement.

➤ **Step 4. Identify Patient Engagement Needs.**

Patients typically need knowledge, motivation, skills, and resources to effectively manage their health and their care, but everyone is different. The specific needs of each patient are unique to them. For example, some patients may have health literacy or numeracy challenges, others may need support in making decisions between various care options, and some patients may have questions about a medication or change in condition that requires dedicated time with a provider. It is important to be sure that the patient has an open line of communication with the practice and that they are able to get through call trees or the call center in order to reach you to ask for support. Other supports such as a patient portal, reminder calls, or medication adherence apps may be appropriate, depending on their unique circumstances.

➤ **Step 5. Uncover What Patients are Bringing with Them.**

It is important to uncover what patients are bringing with them as you work to engage them in managing their health. All human behavior is motivated by intrinsic and extrinsic factors – some factors are obvious, others are not. The need for knowledge, experience, and resources may be easy to uncover through simple questioning. Other extrinsic factors may be more difficult to address unless the patient tells you about them. These factors may include concerns about the cost of medications; difficulties with transportation, housing, or other social needs; psychiatric symptoms they may be experiencing or substance use; poor experience with healthcare professionals in the past; difficulty understanding the condition or treatment due to complexity, cognitive impairment, or current stressors. Intrinsic factors such as needs, beliefs, feelings, values, and desires require deeper conversations to uncover. It is important to uncover the factors presenting barriers to patient engagement and address as many as possible.

➤ **Step 6. Adopt Patient-Centered Principles.**

Preparing yourself as a patient-centered coach takes some reflection. This approach requires recognizing that the patient is an expert in themselves and makes daily decisions which move them in the direction of good health or poor health – such as choosing to eat an apple or a bag of potato chips. As such, they possess solutions within themselves and the role of providers becomes that of a guide on the side, promoting their problem-solving skills and building confidence in their ability to actively manage their own health. Our best engagement skill is non-judgmental curiosity as we demonstrate genuine interest, listen to understand, reflect what we hear from the patient's perspective, and acknowledge their feelings.

➤ **Step 7. Provide Patient Engagement Coaching.**

The basic activities of patient engagement involve keeping information simple, specific, goal-directed, shared, and focused on accountability. To ensure universal understanding, explanations should begin at the sixth-grade level, and be simplified further if needed. This also applies to any written materials or videos. Be specific in giving patients directions about what to do to improve their health by providing detailed information about how to do it. Try to get patients involved in setting their own health goals. Patients will be much more likely to follow a plan if they know they are working toward a goal that is important to them. The more concrete and personal the goals are, the more likely the patient will be to follow the plan of care to achieve them. Start by exploring what is important to them. Avoid assuming that the patient understands the information provided, but instead test for understanding to ensure you are both on the same page. Work to make information sharable with other providers and care team members to ensure patients are receiving consistent direction and encouragement from everyone on their care team. Establish measurable accountability by helping patients track progress toward their goals with tangible reminders such as a log sheet. Be sure to review progress at each encounter, celebrate successes, and support problem solving when best efforts don't result in the outcome expected.

The work of patient engagement can result in patient confidence, knowledge, and partnership with their providers in improving their health outcomes.