ENGAGE!

10 Powerful Ways to Engage Patients in Every Aspect of your Practice
# Table of Contents

- Engaging Your Patients Matters .................................................................................................................. 3
- Engaging before the Visit ............................................................................................................................ 5
- Engaging during the Visit ............................................................................................................................. 7
- Engaging after the Visit ................................................................................................................................. 9
- The Economic Impact of Patient Engagement ............................................................................................. 11
- Next Steps: Patient-Centered Medical Home ............................................................................................. 12
- References .................................................................................................................................................. 14
Engaging Your Patients Matters

“The blockbuster drug of the century is an engaged patient.”

—Eric Topol, MD

Patient engagement is about more than improving care, reducing costs, or attesting for Meaningful Use. It’s about your practice’s bottom line. What would the impact be on your practice if you increased your patient load by 10%? That’s what could happen if you succeed in meeting your patients’ expectations. Patients want to be more involved in their care, they want to have access to more information, and they will change providers if they aren’t happy. The best way to stay competitive? Improve patient satisfaction and engagement.

WHY PATIENT EXPECTATIONS ARE CHANGING

Many patients are paying more of their own healthcare expenses. As they do with other services, they want to feel like they are getting what they paid for—just like you do. In addition, today’s patients are both connected to the Internet and educated about health issues. Your patients use the Internet and mobile devices in most other areas of their lives and want the same kind of access to their healthcare provider. According to Pew Research, 59% of US adults say they’ve looked online for health information in the past year.¹

The era of patients staying with the same provider their entire lives is over. This is not your grandfather’s healthcare. Today, many patients report that they would change providers for better service, lower costs, or more connectivity. Don’t take your patients for granted. If they aren’t happy, they are likely to seek care elsewhere.

Patient Activation

You may have heard the term patient activation used in conjunction with or in place of patient engagement. So what’s the difference? According to the Institute for Healthcare Improvement, engagement is “actions that people take for their health and to benefit from care.” Patient-engagement researcher Judith Hibbard describes activation as, “understanding one’s own role in the care process and having the knowledge, skills, and confidence to take on that role.” They are certainly similar but not quite the same.
Today’s patients are footing more of the bill—as much as 25% to 30% out of pocket. According to the CDC’s Center for National Health Statistics, their expectations also are changing:

- 62% of patients want to correspond online with their primary physicians about their health.
- 65% of patients want appointment reminders via e-mail.
- 75% of patients are willing to go online to view their medical records.²

WHO IS RESPONSIBLE FOR ENGAGING PATIENTS

Patient engagement is not solely the purview of physicians, it does not take place solely in the exam room, nor is it focused only on care and outcomes. Because patient engagement and satisfaction are inextricably linked, to maximize your practice’s effectiveness, you must consider all areas of your practice—clinical and nonclinical.

NEXT STEPS

Think about patient engagement as a spectrum from the minute a patient schedules an appointment to the moment she visits an online patient portal to find her test results. There is value in assessing each step in the process to look for ways to improve the patient experience and connect with patients in positive and engaging ways. In this guide Kareo offers best practice suggestions to do just that.
Engaging before the Visit

The minute a patient calls your office, the process of patient engagement begins. Don’t miss a single opportunity to connect with your patients and provide them with a stellar experience.

CUSTOMER SERVICE STARTS AT THE FIRST CONTACT

Customer service can make the difference between a happy patient and a patient who goes elsewhere. But it means more than simply being warm and friendly. The following suggestions will help you provide excellent service in some of the areas where it can be needed the most:

- Don’t make people wait. When it can’t be avoided let them know why and apologize.
- Always ensure privacy when talking to patients in the waiting room, hallways, or exam room.
- Be responsive to phone calls—don’t leave people waiting too long on hold and call back the same day.

Social Media in Healthcare

Social media offers online platforms—blogs, social networking sites such as Facebook and Twitter, community forums, and more—that enable you to listen to the community and engage in online conversations with patients or potential patients.

Research from HIMSS suggests that the largest patient group using social media is chronically ill patients. Social media provides patients with information and support and offers providers a quick way to get information to patients. While many hospitals are now using social media, independent-practice physicians have been slow to adopt it. While it can be intimidating at the onset, it is a great way to engage your patients. For more information, visit the HIMSS topic area on social media or visit the Mayo Clinic’s Social Media Health Network.
5 WAYS TO HELP PATIENTS BEFORE THEY STEP THROUGH YOUR DOOR

From simple information about your practice to appointment reminders, there are many ways to help patients feel prepared and informed before a visit:

- **Website.** Provide a map and directions to your practice on your website, plus printable versions of commonly used forms such as Informed Consent, Payment Policies, New Patient Information, and Advanced Directives.
- **Social media.** Stay connected with your patients via social media. It’s a way to maintain your relationships and help keep patients informed with reminders for flu shots or quick tips for heart disease prevention and the like.
- **Online appointments.** Online appointment scheduling 24/7 gives patients the ability to schedule appointments at their convenience.
- **Eligibility verification.** Validating patient eligibility not only helps ensure that you get paid, it enables you to give patients a heads-up about their coverage and responsibility so no one is surprised come bill time.
- **Appointment reminders.** Offer your patients phone, email, or text reminders to help ensure they don’t miss appointments. They’ll receive the care they want, and you’ll avoid empty appointment slots.

Yes, You Need a Website!

Laurie Morgan, senior consultant and partner at Capko & Morgan, is adamant that every practice needs a website. Here are her four key recommendations:

1. If your site isn’t modifiable, it’s time for a new, Content Management System (CMS)-based site. They are easier to manage and update and regular refreshing helps with search-engine optimization (SEO).
2. Initial build should be by a partner that understands SEO.
3. The site should reflect your practice’s philosophy and personality, and coordinate with your printed marketing materials.
4. Patients value downloadable forms, appointment setting features, and patient portals. Include these on your site or via services such as ZocDoc.

For more information about how to market your practice, see Laurie’s webinar, [Marketing for Medical Practice Profitability](#).
When doctors don’t listen to patients and vice versa, a slew of issues can result: from physicians missing important cues and misdiagnosing patients to preventable hospital readmissions and poor outcomes because patients didn’t understand or follow care guidelines. The problem has become endemic:

- **80%** of what doctors tell patients is forgotten as soon as they leave the office.
- **50%** of what is recalled by patients is incorrect.
- **40%** of malpractice suits cite a breakdown in physician-patient communication as a cause.²

The result of this “low health literacy” is extra time and cost at the practice dealing with unnecessary phone and in-office follow up and as much as $73 billion in healthcare costs attributed to hospital stays caused by a patient not understanding or adhering to a doctor’s instructions.

In addition to issues around patient care and compliance, patients’ demand for physicians to use an EHR (although they may call it something else) at the point of care is growing and they want better access to their own medical information.

- **2 out of 3** people would consider switching to a physician who offers access to medical records through a secure internet connection.⁴
- **80%** of Americans who have access to their health information in an EHR use it.⁵
**EHR Proficiency**

For everyone to get the most from a mobile EHR, the provider must be proficient with it. Get comfortable with the device before entering an exam room to document an actual patient visit.

- Use the device for everyday tasks until you are proficient.
- Use technology solutions that allow gesturing and do not rely on keyboard use.
- Learn shortcuts and bail-outs:
  - Have a docking station with an external keypad
  - Practice voice recording via a Bluetooth headset
  - Set up a sequencing to your documentation that matches your thought process.
  - Use templates customized to your needs so you can get it to a set of simple gestures as you document.

These steps can significantly reduce documentation time. **Nurses using an EHR reported time savings of up to 45%.**

---

**HEADS-UP MEDICINE**

Heads-up medicine engages patients with and in spite-of technology. It enables a variety of actions to be accomplished by a simple gesture, finger swipe, or tap rather than diverting your attention with complex navigation, keystrokes, spelling, or editing. As a result, you can focus your attention on your patient, instead of your technology.

The use of a truly mobile EHR benefits both the physician and the patient in a variety of ways:

- It can enhance and expand patient interaction by enabling physicians to maintain eye contact.
- It helps providers have meaningful conversations with patients, share images and educational materials, drug interactions, and more on the device.
- It can provide care recommendations to improve both preventive care and chronic disease management.
- It can assist the provider in capturing accurate information efficiently, yet without distraction.
- It enables providers to print visit summaries and educational materials for review with patients before they leave the office.
- It can enable broader patient care beyond the boundaries of the office/office hours.

Even with all these tools, features and benefits, don’t forget to ask if your patient has questions! Then, answer them as thoroughly as you can.

---

Physicians who offer heads-up medicine have a competitive advantage when contracting with preferred payers and private-pay patients!
Patient care and engagement doesn’t stop at the door. Today’s physicians need to offer opportunities that extend the patient experience outside of the practice and keep patients informed, engaged, and compliant. We suggest the following two ways.

1. PATIENT PORTALS

Patient portals offer unparalleled access and connectivity for patients. They provide many features that can help improve their clinical experience and follow through. Specifically, patient portals enable patients to:

- Access and download their medical records
- See their lab test results
- Request refills
- Send secure communications to their physicians
- See and update demographic information
- Receive statement alerts, review bills, and make online payments

“We need to move from ‘what’s the matter with’ our patients to ‘what matters to’ our patients.”

—James Rickert, MD
2. PATIENT PAYMENTS
Simplifying the billing and payment process is another important way you can improve the patient experience. Many patients find medical billing confusing and frustrating, especially if they are being treated by multiple providers and receiving a lot of bills. This is often the case for patients with life-threatening and chronic conditions, including cancer.

There are many ways to make this process less stressful:
- Review the patient’s eligibility and coverage and discuss what the patient may owe.
- Provide your patient payment policy and set up any special arrangements in advance and in writing.
- Collect co-pays at the time of service.
- Offer flexible payments options: cash, check, and credit card.
- Make sure you can take payments in the office, over the phone, and online.
- Offer the option for paper or electronic statements.
- Include a link for online payments on your paper statements.
- If a patient calls with a question about their bill, take the time to answer and make sure they understand before you hang up.

“Many people in health care still don’t realize that patients are the ultimate stakeholder—the ones who have the most at stake in having good, accurate information at the point where it’s needed.”

—Dave deBronkart
Patient Advocate and Blogger

What the Open Notes Trial Revealed
Many physicians are concerned about what it means to give patients access to their visit notes. The open notes trial showed that patients want this access and believe that it improves their understanding of both their medical condition and their treatment compliance. The trial showed:
- 82% of patients opened at least one note.
- Of those, across three sites, 77–87% reported it made them feel more in control and helped them adhere to medication recommendations.
- 85% reported that having access to doctor’s notes would influence their choice of providers in the future.
Each of your patients represents a lifetime value to your practice. According to the American Academy of Family Physicians, the average patient visits their primary care provider 3.19 times a year. Many patients with chronic conditions see their specialist two to four times a year. Cost per visit varies widely by specialty but the estimates generally fall between $100 and $200 per visit. One study of uninsured gave a total per patient amount for the year of $630.

For this purpose, we’ll say the average patient sees their doctor three times a year and the doctor is reimbursed around $500. Over a patient’s lifetime, that equals approximately $25,000. This is probably a conservative estimate because patients with chronic conditions such as diabetes, heart disease, or obesity have much higher healthcare costs.

**INCREASING ENGAGEMENT CAN BOOST REVENUE**

There are many ways that engaging patients and providing improved service can boost your revenue. At the most basic level, it can help you retain existing patients and increase referrals from those patients. Each new patient results in an increase of about $500 a year.

Beyond that, many of the tools discussed in this guide provide other potential revenue benefits:

- Appointment reminders can reduce no-shows by half—that’s at least one no-show per day for the average physician.
- On-demand online appointment scheduling can fill open appointment slots.
- Offering online payment options can speed patient payments, which now make up 30% of practice A/R.
- Providing printed education materials, visit summaries and a patient portal, reduces phone calls and other unnecessary patient follow up, freeing staff for other tasks.

If your practice prevents one no-show and is able to fill one open appointment a day, that could result in an additional $200-$300 a day in revenue for the average provider. If you have 1,500 active patients, and you are able to increase that by 10% through patient referrals, you increase revenue by $75,000 a year.

Conversely, poor customer service and lack of patient engagement could cost you patients. If you experience a loss of 5%, you’re looking at a decrease in annual revenue of $37,500!
It’s an understatement to say that things can move slowly in healthcare. So it’s a good sign that in just a few years, the trend towards adoption of a Patient-Centered Medical Home (PCMH) model is steadily growing. According to the 2013 Great American Physician Survey, conducted by Physicians Practice and sponsored by Kareo, about 20% of providers had either already qualified as a PCMH or were transitioning. This data supports a growing sense that improving patient-care coordination and engaging patients in their wellness has the potential to transform healthcare.

In 2007, a consortium representing more than 300,000 physicians developed a set of joint principles for the PCMH model. These principles were intended to guide the development of a model focused on patient engagement and improved outcomes. From this initial proposal, recognition programs emerged and the National Committee for Quality Assurance (NCQA) became the most widely accepted PCMH program. It promotes the following goals:

- Improve the patient experience
- Recognize clinicians’ efforts
- Provide confidence for purchasers
- Value for money spent on quality care

Some payers have even implemented bonus programs and payment systems based on PCMH recognition.
PCMH ACCREDITATION
PCMH accreditation is aligned with Meaningful Use criteria and provides guidance on improving chronic-care management, as well as improving patient outreach and engagement. To obtain recognition, providers must meet six standard categories:
1. Enhance access and continuity
2. Identify and manage patient populations
3. Plan and manage care
4. Provide self-care support and community resources
5. Track and coordinate care
6. Measure and improve performance

NCQA lays out a very clear path to accreditation on its PCMH website. If you are interested in pursuing recognition for PCMH and becoming a truly patient-centered practice, NCQA is the place to start.

Best Practices for Patient Engagement
Eric Manley, eHealth system manager at the Mayo Clinic, and Dr. Simeon Schwartz, president/CEO of Westmed Medical Group in New York, discussed best practices for successful patient engagement at HIMSS 2013.

Key points included:
• Remember that we are now in an era in which patient care is no longer visit centric.
• Engagement must be meaningful and engage patients where and when it is convenient for them.
• Simply providing services such as a patient portal and reminders won’t cut it.
• Services like messaging should be a part of your practice. Do not look at them as a separate, second, or third option for communicating to patients.
References

1. Pew Internet and American Life Project, [www.pewinternet.org/Reports/2013/Health-online.aspx](http://www.pewinternet.org/Reports/2013/Health-online.aspx)
3. US Department of Health and Human Services, Health Resources and Services Administration, [www.hrsa.gov/publichealth/healthliteracy/](http://www.hrsa.gov/publichealth/healthliteracy/)
7. OpenNotes, [www.myopennotes.org](http://www.myopennotes.org)
Also from Kareo

Explore more of Kareo’s brief, informative guides by visiting www.kareo.com/resources.

Meaningful Use: A Small Practice Guide (Sept 2013)

EHR Implementation: A Small Practice Guide (July 2013)

Selecting the Right EHR for Your Practice: A Guide for Small Practices (June 2013)

HIMSS 2013: A Small Practice Point of View (April 2013)

To Hire or Not to Hire a Billing Service: How to Make the Right Choice for your Practice (February 2013)

ABOUT KAREO

Kareo is committed to providing education and insights to small medical practices. The company works with in-the-trenches influencers, consultants, and Kareo customers to provide relevant tips on how to successfully manage medical practices and medical billing services.

For more information on patient engagement and other important issues affecting your practice, follow @GoKareo on Twitter.