

## SUMMER 2015 NEWSLETTER

Patient engagement is a hot topic in the healthcare industry. In this newsletter, we'll explore its meaning and share our thoughts on the patient portal. The patient portal is an important, although not the only, solution for involving patients in their health and the care that they receive.



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### HOW ENGAGED ARE YOUR PATIENTS?

A growing body of evidence demonstrates that patients who are actively involved in their own health and in the care that they receive have better outcomes and less costly care than those who are uninvolved. In response to this evidence, both public and private healthcare organizations are developing strategies to better engage patients. Examples of patient engagement are educating patients about their conditions and fully involving them in decisions about their care. Is it time for you to explore ways to improve patient engagement in your practice?

#### Patient Engagement: Its Importance and Its Obstacles

If patient engagement makes such good sense and can bring desired results, what's the challenge? We've observed two obstacles, one on the patient side and the second on the provider side.

**On the patient side**, patients vary in their knowledge, skills, cognitive ability, and willingness to manage their own care. Here are two examples:

- Patient A takes great pride in her lifestyle, making sure to exercise moderately and eat healthfully. She maintains a list of her medical conditions and current medication in her wallet so she can make it available to her providers when asked for information. Just recently, she downloaded an app for her phone that pulls information from her medical records. She can find a list of medications and test results from multiple providers in a single place – her Patient Record. When Patient A visits her physician, she's armed with knowledge and eager to receive information. She's engaged!
- Patient B takes a different approach. Right now she's overwhelmed with family responsibilities. She can barely manage her growing family of four young children and ailing parents, let alone concentrate on her own health and health information. She doesn't remember much about her health history and healthcare. When she takes time for a visit to her physician, she wants a quick and inexpensive fix. She's focused on a fast exit so she can pick up her children at school. She doesn't have the time or the interest in an extensive

discussion about stress reduction or generic drugs. She's not engaged, nor is she likely to be, without a concerted effort on her provider's part.

**On the provider side**, patient engagement doesn't just happen. It requires a planned strategy and positive intervention. Just as patients vary with respect to patient engagement, so do medical practices and their clinical and administrative staff. Some practices, providers, and staff are strongly committed to communicating with patients and families, before, during, and after office visits or procedures. These practices might set up a user-friendly website with a patient portal that not only allows but encourages patients to communicate with the practice. They might develop specific strategies for enhancing patient education and for encouraging patient compliance with recommended treatment plans. They might implement a system for following up with patients who have had a procedure performed in the office. Other practices take a hands-off attitude. They don't embrace the concept of patient engagement at all, nor do they care about the relationship between patient engagement and the financial incentive (or penalty) that might apply to them under the Meaningful Use program.

### **Patient Portals: One Way to Enhance Patient Engagement**

One of the most effective tools for enhancing patient engagement is a patient portal – i.e., a secure online doorway into your practice that enables both your practice and your patients to communicate with each other in a secure manner. Think of the airlines. Most airline passengers routinely use portals in order to book and pay for airline tickets, to check in, and to obtain travel information. The patient portal in a medical practice setting has similar capabilities. Let's examine how it can benefit your practice and your patients, how it works, and where you can get it.

A patient portal can enhance patient engagement by creating easy and secure two-way communication. A portal can also enhance administrative efficiency in a medical practice by reducing the number of incoming and outgoing telephone calls and faxes. Although not all portals have exactly the same capabilities, here are the most common features. Keep in mind that providers have the option of using some but not all features of the patient portal that they choose to offer.

- Exchange secure email with the healthcare team
- Receive appointment reminders
- Request prescription refills
- Request (and sometimes schedule) non-urgent appointments
- Check benefits and coverage
- Update contact information
- Download intake forms for patient demographic information and medical history
- View test results
- View patient balance and pay bills online

- Obtain visit summary information
- Obtain patient education materials recommended by the practice

There are multiple ways to create a portal and link it to a practice website. Many but not all software vendors that offer practice management system (PMS) and electronic health record (EHR) solutions now offer their own patient portal feature at minimal or no additional cost. In these cases, the portal is integrated into the vendor's software. If the PMS and/or EHR vendor chooses not to create its own portal but to offer a portal created by a different company, there might be an interface between the portal and that vendor's software. The practice still purchases everything from the PMS and/or EHR vendor. There may or may not be an additional charge for the interface between the two vendors' software. Another option is to purchase a patient portal directly from a company that specializes in portals. For example, Medfusion in Raleigh, NC offers a patient portal that is highly rated by the national rating service KLAS and that has been described as "agnostic". The Medfusion portal can either stand alone or connect with other software applications through an application program interface (API). In most cases, the vendor that provides the PMS and EHR software builds the interface. Be sure to ask about a fee for the interface, and make sure you know who will assume financial responsibility.

If you're interested in exploring options for patient portals, here are some good questions to ask of both your own practice and the vendors that offer them:

- What are your goals with respect to patient engagement?
- Do the features of the patient portal software meet your needs?
- How will you promote the patient portal both within your practice and with patients/families? The more you educate patients about the portal, the more likely they are to use it.
- Are you able to customize different features of the portal to suit your practice?
- What are the vendor's plans for future enhancements to the portal?
- What type of training will you receive (e.g., on-site and/or web-based) and at what cost?
- Following implementation, what type of technical assistance is available?
- Will there be a "go to" person to whom you can direct questions?
- How will the patient portal relate to other software that you have or are considering purchasing?
- If you are purchasing a freestanding portal, does it already have an interface with the other software solutions that you have in your practice, or must the interface be built? If it must be built, is your software vendor(s) willing to pay for the connection?
- Is the contract acceptable to you? (Review language, terms, price, and exit clause.)

Just setting up a patient portal doesn't mean it will help your practice enhance patient engagement. Your entire practice must embrace and promote it, both internally and with patients. Regardless of what you do to promote the portal, there will always be patients who don't use it. Respect their decision, and encourage patient engagement in a positive but non-electronic way.

## Need Help with Patient Engagement?

For additional information, contact Margie Satinsky, MBA, President of Satinsky Consulting, LLC, a Durham, NC consulting firm that specializes in medical practice management. She's the author of numerous books and articles, including *Medical Practice Management in the 21<sup>st</sup> Century*. Contact Margie at [Margie@satinskyconsulting.com](mailto:Margie@satinskyconsulting.com) or 919.383.5998, or check the website ([www.satinskyconsulting.com](http://www.satinskyconsulting.com)).

For information on Medfusion's patient portal, contact Carol Dorn Sanders, Vice President, Marketing, at [carol.sanders@medfusion.com](mailto:carol.sanders@medfusion.com) or check the website ([www.medfusion.com](http://www.medfusion.com)).

## Other Resources for Your Practice

We've written many articles on practice management that appeared in *The Triangle Physician* in 2015. Click on the links below to access them.

- ["Boost Marketing Initiatives"](#)
- ["The Art of Communication-Part 1"](#)
- ["The Art of Communication-Part 2"](#)
- ["Revisiting HIPAA Compliance"](#)
- ["On Your Own...Or Part of a Larger Healthcare System?"](#)
- ["Strategic Business Planning"](#)
- ["Patient Satisfaction Survey"](#)