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CHEAT SHEET

Patient Engagement

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Key takeaways

- Patient engagement initiatives aim to increase patients' level of involvement and ability to manage their health and health care.

- There are a wide variety of patient engagement strategies. Examples include: providing in-person coaching, leveraging shared decision making techniques, and offering robust patient education.

- All staff interacting with patients—from front desk staff, to care managers, to physicians—have a role to play in building patient engagement.

What is it?

Patient engagement initiatives aim to increase patients' level of involvement and ability to manage their health and health care. Patient engagement helps support smooth patient recovery, care plan and medication adherence, and ongoing self-management.

There are a wide variety of strategies that health systems use to engage patients. These strategies include: health literacy screening and support, shared decision making techniques[1], in-person and virtual health coaching, patient education, post-discharge support, care management programs for rising-risk and high-risk patients, financial navigation and counseling, and increased access to patient medical records, among others. These types of initiatives help build patients' knowledge, skills, and motivation to be effective partners in their care.

Patient engagement is often conflated with patient experience. While the two concepts are closely related, they focus on different aspects of care. Patient experience largely focuses on improving patients' experience and perception of a single episode of care such as, an office visit or hospital stay. Patient engagement *includes* patient experience, but focuses more broadly on empowering and equipping patients to become active participants in their care—during interactions with the health system, as well as in-between visits and beyond.

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1. Shared decision making is when clinicians and patients make medical decisions together. To support shared decision making, clinicians often use decision aids to engage patients in medical decisions. The aids can be printed brochures, audio or video presentations, interactive and Web-based materials, or another format.

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Why does it matter?

Many of today's patients are not meaningfully involved in care plan decisions, have limited understanding of their diagnosis and treatment, or are not well-equipped to self-manage care between visits. For example, almost half of patients with chronic diseases struggle to adhere to their prescribed treatment. These dynamics contribute to sub-optimal outcomes and preventable costs. Patient engagement helps improve quality and reduce costs by building patients' knowledge, skills, and motivation to follow their care plans, and proactively seek the appropriate follow-up or preventative care.

DATA SPOTLIGHT

$100 billion

Preventable medical costs per year from care plan nonadherence[1]

21.5pt ⬆

Percentage point increase in patient satisfaction for overall hospital[2,3]

29% ⬇

Decrease in adverse event rate with increased patient engagement[2]

1. Of all medication-related hospital admissions in the United States.
2. Results seen after implementation of a structured team communication and patient engagement program in the ICU.
3. Of patients who reported a top box score (9 or 10 on the 0-10 HCAHPS question [19]) for overall hospital rating.

Source: Kleinsinger F, "The Unmet Challenge of Medication Nonadherence," *The Permanente Journal*, 22, (2018): 18-033, https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6045499/; Dykes P, et al., "Prospective Evaluation of a Multifaceted Intervention to Improve Outcomes in Intensive Care: The Promoting Respect and Ongoing Safety Through Patient Engagement Communication and Technology Study," *Critical Care Medicine*, 45, no. 8, (2017): 806-813, https://www.ncbi.nlm.nih.gov/pubmed/28471886; Physician Executive Council interviews and analysis.

How does it work?

An effective patient engagement strategy starts by understanding patients' current level of engagement to determine how best to support them. While there is no universal way to measure patient engagement, many organizations use tools such as the Patient Activation Measure® (PAM).[1] PAM evaluates patients' knowledge, skills, and confidence to manage their health and health care. Other assessment options include Patient-Reported Outcomes Measurement Information System (PROMIS), Patient Health Engagement Scale, Self-Efficacy for Managing Chronic Disease, Morisky Medication Adherence Scale, and other health literacy screenings.

Based on assessment results, care team members can tailor care plans and patient interactions appropriately. For example, a physician might integrate shared decision making into a visit to collaboratively decide on a course of treatment that aligns with the patients' values and goals. Or a financial counselor might work with a patient to understand the costs of different treatment and payment options to inform their care plan. Or a care manager might work with a patient between visits to build health literacy and self-manage.

While every member of the care team has a role to play in building patient engagement, the ultimate goal is to equip and empower patients to manage their health effectively, proactively ask questions, and effectively navigate the health system. Increasingly, organizations are leveraging technology and digital tools to support that aim across the care continuum. These technologies include: patient portals, online scheduling capabilities, accessible medical records, wearables and remote monitoring, virtual education modules, as well as on-demand access to clinicians through telehealth and chat platforms.

1. PAM is one of the most robustly and systematically evaluated tools to measure how confident, willing, and capable a patient is to manage their care. But taking the questionnaire does not activate the patient, nor is it accompanied by an activation plan for your care team to follow. Here are 500+ research studies featuring the PAM survey as a key variable: https://www.insigniahealth.com/research/archive/.

Source: Insignia Health, "Patient Activation Measure (PAM)," 2018, https://s3-us-west-2.amazonaws.com/insignia/PAM-Fact-Sheet-20180212.pdf; Physician Executive Council interviews and analysis.

Conversations you should be having

01 Decide on screening tools for patients' engagement levels, in order to appropriately tailor care plans and allocate resources.

02 Equip members of the care team to engage their patients by providing effective tools and trainings, such as decision aids and shared decision making techniques.

03 Identify opportunities to engage and empower patients in areas of the care journey that are often overlooked, such as scheduling, billing, and post-discharge.

Many organizations find the biggest challenge in incorporating patient engagement into care delivery is buy-in from the care team—while there is widespread agreement that patient engagement is important, there is often concern around the required time investment during patient visits. However, many patient engagement strategies do not require an outsized time investment on the part of physicians or APPs to do well. And time spent engaging patients upfront can save time and resources downstream.

Source: Physician Executive Council interviews and analysis.

Related resources

WEBINAR SERIES
Patient Engagement 101
advisory.com/patientengagement101

TOOLKIT
The Physician Executive's Guide
to Patient-Centered Communication
advisory.com/pec/patientcommunication

PICK LIST
How to create patient-centered scripting
in ongoing care management
advisory.com/CMscriptingpicklist

REFERENCE GUIDE
Care Delivery Innovation Reference Guide
advisory.com/caredeliveryreferenceguide

RESEARCH REPORT
Deliver a Quality-Driven Patient
Experience for Polychronic Patients
advisory.com/pec/polychronicpx

RESEARCH REPORT
Patient Activation Measure: An Emerging
Tool for Patient Self-Management
advisory.com/PAM

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