

## Education & Outreach Case Study: Helping Providers Engage Patients

**Overview of Case Study:** *In this case study, three Regional Extension Centers— Michigan Center for Effective IT Adoption, Louisiana Health IT Resource Center, and Telligen HIT Regional Extension Center —share their experiences helping providers engage patients and move toward Stage 2 meaningful use.*

**Key Takeaway:** *Providers are concerned about meeting the Stage 2 meaningful use patient and family engagement objectives, as well as developing strategies to continue to engage patients in the long-term. As trusted Health IT advisors, Regional Extension Centers are employing various strategies and tools to help providers overcome these challenges and increase patient engagement.*

### I. Patient and Family Engagement: The National Context

Patient and family engagement is an essential component of achieving the “three-part aim” – the national strategy to improve American’s health and quality of care while lowering costs.<sup>1</sup> “[Patient engagement](#)” refers to a set of “tools, activities, and relationships – by and for both patients and clinicians – that promote shared decision-making and facilitate improved health care outcomes for patients through patient empowerment.”<sup>2</sup>

Patient engagement can be a valuable tool for providers to improve health care quality and patient outcomes.<sup>3</sup> In one study, researchers found that the study’s least engaged patients were three times more likely to have unmet medical needs and twice as likely to delay seeking medical treatment than the study’s most engaged patients.<sup>4</sup> Patient engagement is critical in today’s health care context because engaged patients take a proactive approach to managing their health and health care, which results in improved patient outcomes.

Health IT and electronic health records (EHRs) have emerged as important tools for engaging patients and their families. Health IT and EHRs can:

- Enhance communication and collaboration between providers and patients;<sup>5</sup>
- Increase patient access to their health information;<sup>6</sup>
- Promote health maintenance and prevention; and<sup>7</sup>
- Support patient self-management of chronic conditions.<sup>8</sup>

Health IT and EHRs play a key role in the shift toward patient-centered health care and will ultimately help providers engage patients and improve patient outcomes.

## II. Provider Challenges

Despite the promise of Health IT to help providers engage patients and improve outcomes, providers face many challenges.

To encourage providers to use Health IT and EHRs for patient engagement, the Centers for Medicare & Medicaid Services (CMS) incentivizes certain patient engagement activities through the meaningful use program. Yet providers are struggling, for example, with the Stage 2 meaningful use patient and family engagement objectives. In particular, providers are concerned about the following meaningful use objectives, both of which require patients to play an active role in meeting the measure:

- [\*Patient Ability To Electronically View, Download & Transmit Health Information\*](#) – More than 5% of a provider’s patients must view, download, or transmit to a third party their health information.<sup>9</sup>
- [\*Secure Electronic Messaging\*](#) – More than 5% of a provider’s patients must send a secure message through the EHR system.<sup>10</sup>

For many providers, [patient portals](#) – secure online websites that give patients convenient 24-hour access to personal health information from anywhere with an Internet connection – are effective Health IT tools for meeting these objectives. Still, getting patients to sign up for and use patient portals can be difficult for many providers. To succeed in achieving Stage 2 meaningful use, providers must help patients understand the value of Health IT, EHRs, and patient portals.

Beyond meaningful use, Health IT supports other important developments in health care delivery, such as [Accountable Care Organizations \(ACOs\)](#) and [Medical Homes](#), which emphasize the patient as key to improving outcomes and health care quality.<sup>11</sup> Providers are struggling to integrate patient engagement into these practice transformation initiatives. “Patient engagement is one of the main pain points for providers trying to build medical homes or participate in ACOs,” explained Leslie Kiesel, Senior Marketing Coordinator at the Michigan Center for Effective IT Adoption. “We are trying to convince providers that patient engagement is not a burdensome requirement but rather a mechanism for increasing efficiency and improving health care quality.” In the context of practice transformation initiatives like medical homes and ACOs, providers need help establishing patient engagement as a long-term quality improvement strategy, rather than as a burdensome process required to achieve meaningful use. Ultimately, given the changing health care landscape, RECs must demonstrate the value of patient engagement to providers to help them embrace the broader potential.

### III. Providers Enlist Support from RECs

Providers are working closely with Regional Extension Centers (RECs) to increase patient engagement, achieve Stage 2 meaningful use, and transform health care. As experienced advisors in EHR implementation and meaningful use, RECs are well-positioned to meet provider needs. Three RECs, [Michigan Center for Effective IT Adoption](#) (M-CEITA), [Louisiana Health IT Resource Center](#) (LHIT), and [Telligen Health IT REC](#) (Telligen), share their experiences helping providers increase patient engagement.

#### M-CEITA Helps Michigan Providers Formulate Patient Engagement Strategies

According to Leslie Kiesel, Senior Marketing Coordinator at M-CEITA, patient engagement is a major pain point for providers involved with ACOs and other practice transformation initiatives. To help providers see the value of patient engagement in the context of the changing health care landscape in Michigan, M-CEITA developed a comprehensive patient engagement support program. The program is designed to help providers formulate patient engagement strategies in their practices, capitalizing on the many synergies between patient engagement and other quality improvement projects.

**“M-CEITA is helping providers get the most out of patient engagement, not just ‘check the boxes’ for meaningful use.”**

Laura Haerberle, Project Manager, M-CEITA

M-CEITA’s patient engagement support program has three main arms.

- **Patient Engagement Strategy:** To help providers develop strategies for incorporating patient engagement into their practices, M-CEITA uses provider and patient engagement assessment surveys to benchmark provider and patient readiness. Results from the surveys help M-CEITA inform development of the provider’s patient engagement strategy. “We go over the survey results with providers and use the results to develop goals and design a strategy for increasing patient engagement,” explained Laura Haerberle, Commercial Services Program Manager at M-CEITA. “It is important to help providers realize their patients are ready to be engaged and to assist providers in integrating promotion of patient portals into their patient visit processes.”
- **Patient Engagement Technology Support:** Capitalizing on its Health IT expertise as an REC, M-CEITA also works with practices to implement patient portals and other patient engagement technology solutions. “As an REC, we have worked with over 70 EHR systems, so we have in-depth knowledge of the technology in the field,” Ms. Haerberle remarked. Using this expertise, M-CEITA helps providers develop project

plans for technology implementation and supports providers throughout the process, including developing educational materials for providers to give to patients. For example, one handout, titled “Get connected! Manage your health information online,” describes to patients the benefits of using a patient portal.

- **Targeted Process Optimization:** M-CEITA helps providers redesign workflows in order to maximize patient engagement. “We look at day-to-day clinical processes, such as check-in and follow up with patients, and identify opportunities to build patient interest in the patient portal,” Ms. Kiesel explained.

Through this patient engagement support program, M-CEITA is positioning the REC to be a key partner as providers continue to engage patients to improve quality and transform health care. “Our central role as an REC is to be a liaison between technology and practice,” Ms. Haeberle said. “Our REC is showing providers that patient engagement improves practice efficiency, patient satisfaction, and patient outcomes, which are all important factors in today’s health care market.”

### LHIT Resource Center Helps Rural Health Clinics Engage Patients

When CMS released Stage 2 meaningful use, the needs of Louisiana’s providers shifted to focus increasingly on patient engagement, prompting LHIT’s to adapt its core service offerings. “Once Stage 2 meaningful use came out, we knew we had to take our [patient engagement services](#) to the next level,” explained Nadine Robin, Health IT Program Manager at LHIT. LHIT knew it had to help providers communicate the value of patient portals to their patients. Patient portals are essential for secure electronic messaging with patients as well as having patients view, download, or transmit their health information. “Rural health clinics in Louisiana were particularly vulnerable to this problem,” Ms. Robin explained. “The average rural provider does not have marketing and outreach staff to help promote Health IT and patient portals among their patients.” To fill this gap, LHIT stepped in to help rural health clinics encourage their patients to sign up for and use patient portals.

#### Patient Engagement Resources

RECs recommend the following patient engagement resources.

- [Using e-Health Tools to Engage Providers and Caregivers](#)
- [Using Patient Portals in Ambulatory Care Settings](#)
- [M-CEITA – “Patient Engagement: ‘Tying the Knot’ for Better Health” Webinar](#)
- [Patient Engagement: It’s for Small Clinics, Too – Nadine Robin, HIMSS Presentation](#)

Starting in October 2013, LHIT began developing tools and materials for Louisiana providers to distribute to patients. “We developed tools that the clinics could easily customize with their own logos, such as email and letter templates, brochures, and post cards,” Ms. Robin said. LHIT’s patient engagement strategy follows a logical progression. To get patients acquainted with Health IT and EHRs up front, LHIT initially distributed factsheets that covered general Health IT topics, such as “What’s an electronic health record?” and “What is health information exchange?” For its next round of materials, LHIT is developing tools that are specific to Stage 2 meaningful use, such as, “Five reasons to send your doctor a secure electronic message,” and “What’s so great about patient portals?” The two-step process is intended to introduce patients to Health IT and EHRs before providing education about specific patient engagement technologies (e.g., patient portals).

To date, LHIT is assisting fourteen providers from nine rural health clinics, as well as two hospitals. “We intend to reach out to 40 or 50 clinics in 2014,” Ms. Robin said. For LHIT, giving providers the tools they need to educate patients about Health IT will encourage patients to become more engaged in their health and health care and help providers achieve Stage 2 meaningful use.

### **Telligen HIT REC increases Patient Engagement Among Veterans in Iowa**

Many providers in Iowa have good relationships with their patients and their families, and may not necessarily see the value of Health IT in engaging patients and families to improve health

**“The Blue Button Pilot increases patient engagement because patients initiate data sharing between providers.”**

Susan Brown, Director  
Telligen HITREC

care quality. For some providers, “Using Health IT to engage patients often seems like it is just more work,” Susan Brown, Director of Telligen, explained.

In order to show providers the value of using Health IT to engage patients, Telligen helped launch the Department of Veterans Affairs (VA) Blue Button Data Exchange Pilot Project in summer 2013. The program aims to increase veterans’ engagement in the health care system and improve care transitions from VA to non-VA provider sites. Blue Button – a

symbol adopted by the VA and CMS to signify that a patient can access his or her health information online – can improve transitions of care by putting patient data in the hands of patients, enabling patients to ensure their data is available to all providers involved in their care.<sup>12</sup> The goal of the VA’s pilot project in Iowa is to ensure that non-VA providers can incorporate veterans’ health data (downloaded through Blue Button) into their EHRs.

Telligen’s trusted relationship with providers and hospitals in Iowa as well as its Health IT expertise positioned the REC to assist the VA with program implementation. Telligen recruited four critical access hospitals (CAHs) and their associated outpatient clinics to participate in the pilot. Having worked with each of the CAHs to implement EHRs and achieve meaningful use, Telligen facilitated a kickoff call with each of the CAHs at the start of the program. “We discussed the project’s goals and how the CAHs and outpatient clinics might incorporate Blue Button data into their EHR systems,” Ms. Brown explained. “We wanted to outline exactly what would happen if a veteran arrived with his or her health data or a veteran pushed data to the CAH from My HealtheVet using Direct Secure Messaging.” Telligen continues to support the CAHs and outpatient clinics in improving their processes to better incorporate Blue Button data from veterans and improve patient engagement.

To date, Telligen’s pilot sites are helping around twenty-five veterans facilitate data exchange. In addition to supporting the veterans, Telligen’s work is demonstrating the value of health information exchange. “This is only the first step in the process,” explained Ms. Brown. “Our goal with the Blue Button program is to get providers to think about the health care world outside of their office and ask themselves, ‘How can we use external data to better care for our patients?’ Our next project phase will evaluate how VA data is being used by non-VA providers to improve health care quality.” Iowa’s pilot has been so successful that the VA is planning to use the promising results to expand the Blue Button Data Exchange project nationwide.

**The Impact of Patient Engagement: Dr. Burdick Tells His Story**

*Dr. Tim Burdick, a [Health IT Fellow](#), details how his organization uses the patient portal to engage patients and improve health care quality.*

Dr. Tim Burdick is a family physician at Oregon Health & Science University Rural Health Clinic, the only primary care practice in Scappoose, Oregon. Serving a socioeconomically diverse community, Dr. Burdick works as the clinic’s unofficial “physician champion” of Health IT.

After leading a campaign to encourage more patients to sign up for the practice’s patient portal, Dr. Burdick sees the value of patient engagement in his practice as patients take greater ownership of their health and health care. Patients, for example, are frequently logging on to the portal to view their lab results and are even proactively scheduling follow-up appointments to discuss abnormal results! “Our patient portal is helping us achieve the three-part aim: increased health, improved patient and staff experience, and lower costs,” said Dr. Burdick.

The clinic’s progress with patient portals has triggered success with other quality improvement initiatives, such as the National Committee for Quality Assurance [Patient-Centered Medical Home](#) (PCMH) initiative. “The patient portal has been an instrumental part of gaining recognition as a PCMH,” Dr. Burdick remarked.

## IV. Patient Engagement Goes Beyond Meaningful Use

As the U.S. health care system continues to find new ways to achieve the three-part aim – improving health care quality and the health of Americans while lowering health care costs – patient engagement is critical for transforming health care delivery. Policymakers and other health care stakeholders are challenging providers to think creatively about engaging patients, offering incentives through the meaningful use program and innovative health care delivery models to provide patient-centered health care. “Many providers are still looking at patient engagement as a way to meet Stage 2,” explained Nadine Robin, Health IT Program Manager at LHIT. “RECs have such an important role in this work—we need to get providers excited about patient engagement for Stage 2 and beyond!” With the help of RECs, providers are leveraging Health IT and their EHR systems to improve health care quality and patient outcomes through patient engagement.

### Health IT Success Stories

For more stories about how providers are engaging patients and improving health care quality with the help of RECs, see the following Health IT Success Stories.

- [Dr. Hebou Uses a Patient Portal to Improve Patient Participation](#)
- [Dr. Maselli Leverages Health IT to Increase Patient Engagement](#)
- [Patient Portal Implementation Leads to Improved Patient Engagement at Desert Ridge Family Physicians](#)
- [Dr. Michael Gilbert: How to Use a Patient Portal](#)

<sup>1</sup> U.S. Department of Health and Human Services. “2012 Annual Progress Report to Congress National Strategy for Quality Improvement in Health Care.” 2012.

<sup>2</sup> Key Health Alliance. “Patient Engagement Portal.”

<sup>3</sup> “Health Policy Brief: Patient Engagement.” *Health Affairs*. 2013.

<sup>4</sup> Hibbard JH, Cunningham PJ. “How Engaged Are Consumers in Their Health and Health Care, and Why Does It Matter?” *Center for Studying Health System Change*. 2008.

<sup>5</sup> Hibbard JH, Cunningham PJ. “How Engaged Are Consumers in Their Health and Health Care, and Why Does It Matter?” *Center for Studying Health System Change*. 2008.

<sup>6</sup> HealthIT.gov. “Patient Participation.”

<sup>7</sup> HealthIT.gov. “Patient Participation.”

<sup>8</sup> Fluckinger D. “OpenNotes pilot suggests greater patient engagement is on the horizon.” *SearchHealthIT*. 2012.

<sup>9</sup> Centers for Medicare & Medicaid Services. “Stage 2 EP Meaningful Use Core Measures: Measure 7 of 17.” 2012.

<sup>10</sup> Centers for Medicare/Medicaid Services. “Stage 2 EP Meaningful Use Core Measures: Measure 17 of 17.” 2012.

<sup>11</sup> HealthIT.gov. “Issue Brief: Using Health IT to Put the Person at the Center of Their Health and Care by 2020.”

<sup>12</sup> U.S. Department of Veteran’s Affairs. “VA Blue Button.”