The Role of the Nurse in Patient Engagement

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Conflict of Interest Disclosure

Mark D. Sugrue, MSN, RN-BC, FHIMSS, CPHIMS

Has no real or apparent conflicts of interest to report.
Learning Objectives

The Role of the Nurse in Patient Engagement

This session will focus on lessons learned and best practices on how to engage patients more proactively in their healthcare, as well as offer helpful advice on how nursing staff can be the change agents and role models when it comes to patient engagement activities.

1. Review the Meaningful Use initiatives related to Patient Engagement
2. Discuss best practices for engaging patients in their healthcare and corresponding technologies available to help manage their data and increase the overall patient experience
3. Identify when and how to integrate Patient Generated Health Data (PGHD) into Electronic Health Records
Outline

I. Introductions
II. Definitions
   a) Patient Engagement
   b) Patient Generated Health Data
III. Meaningful Use and Patient Engagement
IV. Patient Engagement Framework
V. Patient Engagement Strategies
Lahey Health
Lahey Health
- 7 Hospital System
- Northeastern MA
- 850 Total Beds
- 1400 Providers
- $1.6B Revenue
- Accountable Care Organization

Beverly Hospital
A member of Lahey Health

Winchester Hospital
A member of Lahey Health

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Lahey Health: Highly Coordinated Care

[Map of Lahey Health facilities and locations with various markers indicating different clinics and hospitals across the region.]
New EHR: Live on 3/28/2015

“Lahey Health is committed to being on the forefront of healthcare technology with one goal in mind: providing the highest quality, safest patient care.”

New EHR Goals:

• Advance the highest safety and quality of patient treatment at the most reasonable cost, location and level of care

• **Increase patient and family engagement**, as well as satisfaction for every interaction

• Improve colleague effectiveness, efficiency and satisfaction

• Enable coordination of care and integration of health information

• Provide backbone for institutional growth and financial stability
Definitions: Patient Engagement & Patient Generated Health Data
The Patient Engagement (PE) Enigma:

- The operational definition of patient or person-centered engagement continues to be widely debated in healthcare.
- PE is increasingly conceptualized to include a composite of practices that impact key behaviors and health.
- Commitment behaviors by the patient, provider/system, technology partner are all involved in an individual's well being and increasingly include:
  - Understanding
  - Communication
  - Delivery
  - Consumption
  - Retention
  - Adherence

The blockbuster drug of the 21st century

Susan Dentzer, editor of *Health Affairs*

What is Patient Engagement? Why does it matter?

• Patient engagement is the process by which patients become invested in their own health.

• Health systems with effective patient engagement programs provide patients with the information and tools needed to take control of their care.

• From Meaningful Use to Value-Based Purchasing, patient engagement is a key feature of payment reform and is instrumental in readmissions reduction, HCAHPS, and patient loyalty.

• Engaged patients not only have better outcomes, but engaged patients are better business.

• Not only offer electronic access to patient health records, but also provide the resources patients need for the day-to-day management of disease.

• If patients are to take charge of their health, then health systems and plans must meet them where they are--and that would be their mobile devices.

Benefits

- A Commonwealth Fund-supported study demonstrated that patients with the lowest engagement generated 21% more health costs.

- In another study, patients suffering from depression were given interactive engagement tools. These patients showed a 33% increase in antidepressant medication adherence, decreased overall depression scores, and a 61% increase in satisfaction.

"...health-related data created, recorded, or gathered by or from patients (or family members or other caregivers) to help address a health concern."

PGHD: Considerations

• Validity of patient generated data
  – Patient actions or technique
  – Medical device or sensor accuracy or maintenance
  – Timeliness
  – Veracity
• Where and how data is used in EMR
  – Segregated from validated sources vs. comingled
• Data Provenance and Propagation of information

SAMPLE PGHD:

• Forms: history, medication lists, allergies
• Demographics
• Objective clinical data from connected devices:
  – Weight
  – Blood glucose
  – Blood pressure
• Social Media
Meaningful Use and Patient Engagement
Meaningful Use

• American Recovery and Reinvestment Act (H.R.1)
• Aka: “Economic Stimulus Package”
• $787 Billion
• Signed: 2/17/2009
• $19B for HIT
• Carrot & Stick Incentives
• Certification
• Quality measures
• “Meaningful Use”
“These goals can be achieved only through **the effective use of information** to support **better decision-making and more effective care processes** that improve health outcomes and reduce cost growth.”

**Meaningful Use Over Time**

2011
Data Capture and **Sharing**

2013
Advanced Clinical Processes

2015
Improved Outcomes

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<table>
<thead>
<tr>
<th>Stage 2</th>
<th>Stage 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EH (16)</strong></td>
<td><strong>EP (17)</strong></td>
</tr>
<tr>
<td>1 CPOE</td>
<td>&gt; 60%</td>
</tr>
<tr>
<td>&gt; 30%</td>
<td>&gt; 30%</td>
</tr>
<tr>
<td>&gt; 30%</td>
<td>&gt; 30%</td>
</tr>
<tr>
<td>2 Demographics</td>
<td>&gt; 80%</td>
</tr>
<tr>
<td>3 Vital Signs</td>
<td>&gt; 80%</td>
</tr>
<tr>
<td>4 Smoking Status</td>
<td>&gt; 80%</td>
</tr>
<tr>
<td>5 Interventions/CDS</td>
<td>5</td>
</tr>
<tr>
<td>Enable</td>
<td>Enable</td>
</tr>
<tr>
<td>Enable</td>
<td>Enable</td>
</tr>
<tr>
<td>6 Lab Structured</td>
<td>&gt; 55%</td>
</tr>
<tr>
<td>7 Patient List</td>
<td>Generate</td>
</tr>
<tr>
<td>8 eMAR</td>
<td>&gt; 10%</td>
</tr>
<tr>
<td>&gt; 10%</td>
<td></td>
</tr>
<tr>
<td>9 Patient Access</td>
<td>&gt; 50%</td>
</tr>
<tr>
<td>View, Download, Transmit</td>
<td>&gt; 5%</td>
</tr>
<tr>
<td>&gt; 5%</td>
<td>&gt; 5%</td>
</tr>
<tr>
<td>10 Education</td>
<td>&gt; 10%</td>
</tr>
<tr>
<td>11 Med Reconciliation</td>
<td>&gt; 50%</td>
</tr>
<tr>
<td>12 Summary of Care</td>
<td>&gt; 50%</td>
</tr>
<tr>
<td>13 Immunizations</td>
<td>Ongoing</td>
</tr>
<tr>
<td>14 Labs - Public Health</td>
<td>Ongoing</td>
</tr>
<tr>
<td>15 Syndromic Surveillance</td>
<td>Ongoing</td>
</tr>
<tr>
<td>16 Security Analysis</td>
<td>Conduct/Review</td>
</tr>
<tr>
<td>17 eRX</td>
<td>&gt; 10% (Menu)</td>
</tr>
<tr>
<td>18 Preventive Reminders</td>
<td>&gt; 10%</td>
</tr>
<tr>
<td>19 Clinical Visit Summary</td>
<td>&gt; 50%</td>
</tr>
<tr>
<td>20 Secure Message</td>
<td>&gt; 5%</td>
</tr>
<tr>
<td>M Advance Directives</td>
<td>&gt; 50% (Menu)</td>
</tr>
<tr>
<td>M Imaging results</td>
<td>&gt; 20% (Menu)</td>
</tr>
<tr>
<td>M Family History</td>
<td>Ongoing (Menu)</td>
</tr>
<tr>
<td>M Cancer Registry</td>
<td>Ongoing (Menu)</td>
</tr>
<tr>
<td>M Specialized Registry</td>
<td>Ongoing (Menu)</td>
</tr>
<tr>
<td>M Progress Note</td>
<td>&gt; 30% (Menu)</td>
</tr>
<tr>
<td>M Labs - Provide to EP</td>
<td>&gt; 20% (Menu)</td>
</tr>
</tbody>
</table>
# Patient Engagement: Stages 1 & 2

<table>
<thead>
<tr>
<th>MU Patient Engagement</th>
<th>Stage 1</th>
<th>Stage 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Access</td>
<td>eCopy</td>
<td>&gt; 50%</td>
</tr>
<tr>
<td>View, Download, Transmit (VDT)</td>
<td></td>
<td>&gt; 5%</td>
</tr>
<tr>
<td>Discharge Instructions (EH)</td>
<td>&gt;50%</td>
<td>Combined with VDT</td>
</tr>
<tr>
<td>Timely Access (Portal)</td>
<td>&gt;10%</td>
<td>Combined with VDT 4 Days (EP) 36 Hrs (EH)</td>
</tr>
<tr>
<td>Patient Specific Education</td>
<td>10% (Optional)</td>
<td>10% (Required)</td>
</tr>
<tr>
<td>Secure Messaging (EP)</td>
<td>N/A</td>
<td>&gt;5%</td>
</tr>
<tr>
<td>Patient Reminders (EP)</td>
<td>&gt;20% (Optional)</td>
<td>&gt;20% (Required)</td>
</tr>
</tbody>
</table>
Proposed Meaningful Use Phase 3 Rule: Identification of key engagement priorities

① Increase from 5 to 25% of patients reviewing, downloading and transmitting their personal data. May use an Application Programming Interface (API). >80% of all patients provided access.

② >35% of all patients seen by a provider or discharged from the hospital will receive a secure electronic message via the electronic health record (EHR) or in response to a secure message sent by the patient.

③ >15% of patients to contribute to patient-generated health data or data from a non-clinical setting to integrate in the EHR.

④ Increase to 35% Provide electronic access to Patient Education resources.

Rule Published: 3/30/2015
Comment Period: 5/29/2015
Proposed MU Modifications for 2015-17

Proposed Rule: *Electronic Health Record Incentive Program—Modifications to Meaningful Use in 2015 Through 2017*

- Providers can report any continuous 90-day period in 2015
- EHs report on the calendar year rather than the federal fiscal year
- Consecutive year-long reporting for all providers in 2016 and 2017
- Removes measures, lessens certain patient engagement thresholds
- Mandates electronic prescribing for EHs beginning 2016
- Accelerates program participation timelines for providers new to MU
- Aligns public health requirements with the proposed Stage 3 structure

Patient Engagement Framework
Welcome to the value revolution: The Triple Aim meets patient engagement

Source: IHI Triple Aim

The Evolution of Contemporary PE Models: HIMSS Five Phases of Patient Engagement
Regional Primary Care Coalition: Six Dimensions of Patient Engagement

- **Patient satisfaction**: providers learn about patient and family experiences via surveys and feedback
- **Informed choice**: clinicians share treatment plans and “allow” patients to guide planning
- **Shared decision-making**: providers work with patients and families closely to better align options with preferences
- **Partnering with patients**: patients & families and health systems jointly design the delivery of care
- **Ownership of health**: patients & families have high health literacy and engage the health system as needed
- **Engagement in population health**: patients and family members engage to improve health and healthcare

Patient Engagement Strategies
Vision for patient and family engagement: Eight strategies for change

- Patient and family preparation
- Clinician and leadership preparation
- Care and system redesign
- Organizational partnership
- Measurement and research
- Transparency and accountability
- Legislation & regulation
- Partnership in policy

## The Engaged Consumer

- Services will be consumed across five phases of engagement.
- Each phase will need to be enabled via capabilities built into the institutions PE framework.
- Each of the phases target one of two consumer audiences:

<table>
<thead>
<tr>
<th>Phases of Engagement</th>
<th>Capabilities (Examples)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seek Information</td>
<td>- Static information retrieval&lt;br&gt;  - Physician, Facility, Condition, Medication, Procedure lookups</td>
</tr>
<tr>
<td>Access Care</td>
<td>- Online Forms&lt;br&gt;  - Pre-registration, questionnaires&lt;br&gt;  - Social Media (e.g. &quot;Yelp reviews&quot;)&lt;br&gt;  - Insurance quotes&lt;br&gt;  - Share PHI in advance&lt;br&gt;  - Scan documents (e.g. prescriptions)&lt;br&gt;  - Well-being assessments, wellness surveys</td>
</tr>
<tr>
<td>Receive Care</td>
<td>- eCheck-in&lt;br&gt;  - eCare&lt;br&gt;  - eReferrals&lt;br&gt;  - eReminders (e.g. prescriptions)</td>
</tr>
<tr>
<td>Follow up Care</td>
<td>- Patient Satisfaction Survey&lt;br&gt;  - Care Management, Care Transitions&lt;br&gt;  - Reminders, Compliance</td>
</tr>
<tr>
<td>Manage Personal Health &amp; Wellness</td>
<td>- Wellness plan management&lt;br&gt;  - Virtual coaching&lt;br&gt;  - Ongoing monitoring, trend analytics/alerts&lt;br&gt;  - Aggregate 3rd party apps&lt;br&gt;  - Behavior-based push recommendations&lt;br&gt;  - Integrate family health records&lt;br&gt;  - Appointment reminders&lt;br&gt;  - Chronic care management&lt;br&gt;  - Social incentives</td>
</tr>
</tbody>
</table>

“Captive”
Outside Service Area
## Patient Engagement Strategies Across the Continuum

<table>
<thead>
<tr>
<th>Health Care System</th>
<th>Examples of Engagement Strategies</th>
</tr>
</thead>
</table>
| Community          | Providing health education and health literacy classes  
|                    | Providing healthy cooking and physical education classes  
|                    | Using patient navigators and peers to provide support to help patients achieve healthier lifestyles (e.g., smoking cessation programs)  
| Organization       | Support care and family advisory councils,  
|                    | Social media (e.g., Facebook, Twitter)  
| Health Care Team   | Providing shared decision-making tools  
|                    | Using patient teach-back  
|                    | Using clinic-based multidisciplinary care teams  
| Individual         | Seeking health information and knowledge  
|                    | Adhering to treatment plans and medication regimens  
|                    | Participating in shared decision making  
|                    | Using online personal health records  
|                    | Engaging in wellness activities |
Health IT tools to assist with PE

- Internet
- Portals
- Secure Messaging
- Secure Mobile Applications
- Industry Resources
- Proxy access
Gartner Hype Cycle

Source: Gartner (July 2013)
Websites

Patients engage through access to websites for health information from other consumers.

- Patient’s Like Me
- Caring Bridge
- My Lifeline.org
- Healing well.com
Access to Medical Record and Portals

- Patients want and need tools that help them communicate and collaborate with their providers.

- Shared medical records help provide availability of information.

Portals help because “They’re important because they allow patients to take charge and do the things they should be doing on their own like scheduling appointments and receiving notifications and reminders for those appointments and medications.”

# Challenges: Portal Data Release

## Timeframes

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Vendor</th>
<th>MA AMC</th>
<th>MA Health System</th>
<th>OH Health System</th>
<th>NC AMC</th>
<th>CO Hospital</th>
<th>VA Health System</th>
<th>MI Health System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal Labs</td>
<td>1 day</td>
<td>Same day</td>
<td>Same Day</td>
<td>72 hrs</td>
<td>Same Day</td>
<td>Same Day</td>
<td>Same Day</td>
<td>Same Day</td>
</tr>
<tr>
<td>Abnormal Labs</td>
<td>1 day</td>
<td>Same Day</td>
<td>Same Day</td>
<td>72 hrs</td>
<td>Same Day</td>
<td>Same Day</td>
<td>Same Day</td>
<td>Same Day</td>
</tr>
<tr>
<td>Sensitive Labs/STD/Pregnancy</td>
<td>5 days</td>
<td>Same day</td>
<td>7 days</td>
<td>72 hrs</td>
<td>Manual</td>
<td>Same Day</td>
<td>14 Days</td>
<td></td>
</tr>
<tr>
<td>Pathology</td>
<td>5 days</td>
<td>7 days</td>
<td>7 days</td>
<td>72 hrs</td>
<td>Manual</td>
<td>14 day</td>
<td>14 days (xc PAPs)</td>
<td></td>
</tr>
<tr>
<td>Plain Film/Bone Density</td>
<td>2 days</td>
<td>Same Day as final result</td>
<td>Same Day as final result</td>
<td>72 hrs</td>
<td>96hrs</td>
<td>Same Day</td>
<td>7 days</td>
<td>Same Day as final result</td>
</tr>
<tr>
<td>CT MRI advance Rad</td>
<td>5 days</td>
<td>7 days</td>
<td>3 days</td>
<td>72 hrs</td>
<td>96hrs</td>
<td>7 day</td>
<td>7 days</td>
<td>Same Day as final result</td>
</tr>
<tr>
<td>Drug Tox</td>
<td>5 days</td>
<td>Same day</td>
<td>7 days</td>
<td>72 hrs</td>
<td>Manual</td>
<td>Same Day</td>
<td>14 days</td>
<td></td>
</tr>
<tr>
<td>Genetics</td>
<td>5 days</td>
<td>Same day</td>
<td>7 days</td>
<td>72 hrs</td>
<td>Manual</td>
<td>Not Released</td>
<td>14 days</td>
<td></td>
</tr>
<tr>
<td>HIV*</td>
<td>Not Released</td>
<td>Not Released</td>
<td>72 hrs</td>
<td>Manual</td>
<td>Not Released</td>
<td>14 days</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
My Lahey Chart Activations

Activations

3/31/2015
4/30/2015
5/26/2015

299
9268
15531

Lahey Health

NURSING INFORMATICS INSTITUTE
More than 4.8 million patients have easy access to their clinician's notes thanks to OpenNotes.
Society for Participatory Medicine

Participatory Medicine is a model of cooperative health care that seeks to achieve active involvement by patients, professionals, caregivers, and others across the continuum of care on all issues related to an individual's health.

Participatory medicine is an ethical approach to care that also holds promise to improve outcomes, reduce medical errors, increase patient satisfaction and improve the cost of care.

http://participatorymedicine.org/
Patient-Centered Care

- Move to patient-centric healthcare
- Patient is at the center of his experience and controls the environment.
- Use of many tools to connect the patient to the healthcare arena
  - Mobile apps
  - Wearable devices
  - Social media
  - Portals- personal health record, EHR
  - Interoperability
  - Internet Sites-
    - Patient’s Like Me
- More Data exchange and availability of data in one location
- Tools to help patient’s manage their healthcare information

Dr. Charlotte Hovet, MD, Medical Director of Global Healthcare Solutions, Dell Services/Healthcare and Life Sciences. Dec. 2, 2014 from New Mandates, New Solutions: The Evolving Roles of the CMIO and Clinical Informatics Team- Slide 8-10
Patient Directed Care

RI: **Safe Transitions Program**

- Patient-centered care,” “is all about the patient, but it often doesn’t include the patient [and what he or she wants].” Patient-directed care “has them leading and taking charge.”
- The “Patient” will see you now.
- Patient information digitalized
- Connecting patients to their care-allowing them to take ownership.

Results:
- 20.2% ↓ Readmissions
- 1500 Avoided Readmissions
- $13.9M Medicare Savings

Remote Patient Access & Monitoring

- Video Visits
- Telemedicine
- Peek-A-Boo [https://www.youtube.com/watch?v=6XQcgx75BRw](https://www.youtube.com/watch?v=6XQcgx75BRw)
Patient Education

- Interactive
- Pre-Admit - Auto assigned based on procedures scheduled
- Inpatient - Ordered by the RN through the EHR
- Ambulatory - Ordered by staff to be viewed at home.
Mobile Apps

• Mobile Apps- Mayo Mobile App
• Mayo Clinic Application - https://www.youtube.com/watch?v=UAymmf5ZUNo
Exhibit 2. Implementation Status of Cell Phone Interventions Among Providers

What is the status of implementation of specific cell phone interventions that your organization currently provides or supports?

- Currently provide
- Will provide within the next year
- Under review
- Currently no plan to provide
- Policies do not support use

Gamification: The Avatar Will See You Now

Medical centers are testing new, friendly ways to reduce the need for office visits by extending their reach into patients’ homes.

Receiving remote medical care is becoming more common as technologies improve and health records get digitized. Sense.ly, the California startup running the trial, is one of more than 500 companies using health-care tools from Nuance, a company that develops speech-recognition and virtual-assistant software. “Our goal is basically to capture the patient’s state of mind and body,” says Ivana Schnur, cofounder of Sense.ly and a clinical psychologist who has spent years developing virtual-reality tools in medicine and mental health.

Challenges with patient engagement-related technology

• Adoption - by patients
• Disparate systems - not a single unified experience
• Language concerns
• Nursing Challenges
  – Increased workload
  – Patient identification - correct patient access
  – Confusion/Lack of knowledge about the portal content and functionality.
Nursing Opportunity

1. Lead efforts to promote Patient Engagement
2. Advocate for federal, state, local and institutional changes in support of Patient Engagement
3. Assess patient/family health literacy
4. Continue as trusted patient advisor
5. Support patient engagement at all levels
6. Learn Patient Engagement strategies and tools
7. Be an engaged patient!!
Practical Advice – ePatient Dave

• Stop referring to patients in the third person as if they are not in the room.

• Let patients and families fill in the blanks on things that might be missing from their records.

• Recognize that Googling about one’s diagnoses is a sign of patient engagement.

• Adopt the belief that patients will perform better in managing their care if they are better informed.

• Understand that information alone is not enough—make it easier for patients to do the right thing by designing easy interventions and reminders.

Practical Advice – ePatient Dave

• Work to clarify and simplify your messages when giving patients information.

• See the value in patient networking—patients with similar problems know what patients want to know.

• Welcome family interest in the patient’s care.

• Let patients scour the earth for information on their health problems and appreciate their efforts.

• Let patients help with quality and safety by valuing their questions and reminders.

- Thank you -

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