

Patient Engagement = Better Outcomes Effective Use of the Patient Portal; Creating a “Buzz” to Engage Your Patients



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“Improving Ohio’s Health” is an on-going series of articles and webinars that are developed to help providers in the care management of patients with hypertension and/or diabetes.

This article explores the patient portal as one of the easiest ways to engage patients in managing their chronic conditions; and identifies the importance of marketing portal use to patients by creating a “buzz” about the portal and thereby increasing a patient’s knowledge about improving their health.

It is widely accepted that patients engaged in their own care have dramatically better outcomes. One tool used by many care providers for patient engagement is the patient portal. While the studies on portal use by patients specifically with hypertension and diabetes is very limited, there is an overwhelming amount of research stating that portals are an essential tool for chronic disease management. In July 2016, Scott Mash wrote an article titled “Technology Tactics to Make Patient Engagement Easier” that focused on the utilization of patient portals, kiosks, phone based apps and connected devices to increase patient engagement. That article shared information on studies that show the positive impact and future potential with the utilization of portals and other tools to engage patients with chronic diseases including hypertension and diabetes.

This article focuses solely on the patient portal:

- Potential barriers to success that must be addressed early in a project plan
- Practical advice provided by Holzer Health System staff on marketing and patient adoption tactics that led to their very successful and highly utilized portal
- Research showing why the portal should be the central technology tool for patient engagement



Throughout the article, we will discuss the various elements that should be considered for a successful portal strategy; barriers that you may experience; and how to overcome the barriers to ensure your portal becomes a highly-utilized tool by your patients with hypertension, diabetes and other chronic conditions. While the information included in this article contain strategies used by a large healthcare system, the same strategies can be

customized for any size organization. Team work is by far the most important element to ensure your patients are using your patient portal to manage their health.

First, let's reflect on why engaging your patients with one or more chronic conditions, especially those patients with hypertension and/or diabetes, is so important.

Patient engagement is described as a key strategy encompassing tools and actions taken by patients, caregivers, and physicians that promote informed decision-making and behaviors that lead to improved health outcomes.

Self-management of *any* disease, which is built on the foundation of patient engagement, can greatly improve outcomes, reduce healthcare related costs and lower the likelihood of hospital admissions.

Potential Barriers to Portal Success

Technically, the implementation of a portal does not truly vary between vendors. The implementation team must establish connectivity, identify the clinical information that will flow, validate the EHR workflow necessary to push data to the portal, and then ensure that the portal is secure. The team must realize that initial adoption may be slow, work to not lose momentum, accept that issues will occur, and react positively when the issues do arise. The variance between organizations, with respect to portal implementations, will be the non-technical barriers that arise during implementation and rollout.

A successful implementation requires a cross-functional team that accepts that challenges will arise and are open to inventive means of overcoming those obstacles. These barriers can be both internal and external to the organization and may be completely out of the realm of influence for the implementation team. Most will find that the primary barriers will be limited adoption due to a lack of awareness by both patients and providers, the lack of desire to use the portal, and the technical aptitude to use and understand the portal.



External barriers may be driven, in part, by socio-economic factors as the use of patient portals is strongly influenced by factors such as the patient's age, culture, education level, health literacy and the "digital divide." One study stated that "characteristics such as younger age, greater education, non-minority race, and higher income were associated with increased enrollment in portals among patients with diabetes."¹ This same study also stated that patients who are of a minority race or ethnicity, lower income or without a

college education are more likely to only access the internet through smartphones or mobile devices.

The members of the care team and organizational leaders serve as the primary internal barriers to a successful portal strategy. It is critical that physicians, nurses and other care team members believe in the portal's benefits and encourage patients to utilize the portal. Even one negative comment to a patient regarding the portal can have a significant effect on the patient's motivation to effectively use the portal.

Often clinicians express concerns about patient portals that include: patient anxiety regarding test results posted in the portal; patient entered data flowing from the portal to the EHR; the possible liability for tracking and acting on patient entered information (such as blood glucose levels and blood pressure readings); the potential change in patient expectations regarding the patient-provider relationship; and the anticipation of an increased workload from patient messages.ⁱⁱ While studies show that these concerns are often unfounded and that the ability for patients to view labs is often the most useful, the team should take the time to listen when these concerns are expressed and follow up several months after the portal goes live to ensure that all concerns were addressed.

Practical Advice: Successful Portal Use is Possible in a Rural Health System

Holzer Health System is a multi-disciplinary healthcare system located in southern Ohio and western West Virginia with 15 ambulatory locations, a 25-bed critical access hospital, a 266-bed hospital and 160 providers in over 30 specialties. Holzer undertook a project to promote its portal by increasing the number of registered portal users. In a very short time, Holzer was successful in increasing the number of registered portal users from 5,000 to 20,000 users. This effort, led by Kevin Waller, Director of Communications, successfully divided the project into three major strategies:

- 1. Define the portal**
- 2. Be proactive**
- 3. Meet Meaningful Use**

Define the Portal

Since 2013, Holzer has had the *FollowMyHealth* portal; yet the portal had not been defined as a patient engagement tool to providers and as a service to patients. When Waller took the



helm of this project, the team quickly recognized that people didn't understand that *FollowMyHealth* is a patient portal. "The biggest benefit of *FollowMyHealth* to a patient is the ability to put your record at your fingertips," Waller shared. So, taking inspiration from a local home improvement store's marketing campaign, he rebranded the portal to *MyHolzer.com*," Waller shared, "The

biggest thing for achieving success with a patient portal is actually getting out to your patients and telling them why they should use it. One of the marketing tools was an elevator speech that addressed the three primary useful benefits for patients: 1) Renew your prescriptions, 2) Request an appointment, and 3) Send a message to your doctor.”

Be Proactive

“You cannot take an ‘If you build it they will come’ approach and expect high usage of your portal. You need to inform patients that “Hey here’s this *MyHolzer* tool. It’s something that has the potential to change your life’,” said Waller. Every patient is different so it requires a variety of approaches to connect with patients about using the portal. The care team, with assistance from their marketing colleagues, developed a multi-channel marketing campaign with three distinct approaches to reach their broad patient base: *utilize the call center, operationalize sign-ups as part of the patient visit, and heighten awareness.*

1. **Utilize the call center** – Waller stated that, “Our phone center, also called our contact center, had the greatest impact with encouraging patients to sign up for the portal. We receive about 100,000 calls per month. With every call, they describe to the patient what the *MyHolzer* portal is, what benefits it provides, then send the patient an invite via email right then.” The *MyHolzer* portal provides functionality for nearly every patient need that would have previously required a phone call to a provider.
2. **Operationalize sign-ups as part of the patient visit** – Holzer engaged their clinical staff by demonstrating the direct portal benefits while addressing the concerns of physicians and nurses and involving them in the marketing efforts. Including the physicians, nurses, office staff and other clinical providers creates multiple opportunities to register and engage patients with the portal.
3. **Heighten awareness** – “The Holzer marketing team deserves a great deal of the credit for developing an innovative campaign to generate patient interest in the portal that included newly designed brochures and using iPads as raffle prizes for new portal registrations,” said Waller. Waller developed a presentation that provided an overview of the *MyHolzer* portal which he presented to local civic groups, senior centers, chamber of commerce meetings and at any other opportunity where Holzer’s patients may have been in attendance.

Meet Meaningful Use

Waller readily admits that the implementation of the portal was initially driven by the requirements of the Meaningful Use program. Meaningful Use did provide incentives for providers to become involved as this program had two portal measures with thresholds that must be exceeded for providers to meet the Meaningful Use requirements. The first objective, commonly referred to as VDT (view, download, transmit), measured the number of patients that logged into the portal after their recent visit and viewed their clinical information. The second objective,



called Secure Messaging, measured the number of patients that sent a secure message or prescription refill request to their provider.

The portal team generated reports for providers and made it clear how many patients each provider needed to enroll and engage within the portal. The dashboard reports provided clear manageable goals. “Stage 2 of Meaningful Use was much harder since it included the VDT and Secure messaging measures. Our portal initiative is one example of what Meaningful Use was all about; finding ways to engage patients in their own care. It was important for everyone involved to remember that we did all this to help our patients,” Waller shared.

[Research and the Importance of Patient Portal Use](#)

The studies on the general use of patient portals, though limited in number and breadth, have a common theme—the subset of patients with poorly controlled conditions, who lack the skills to manage their conditions, can benefit from a patient portal that provides access to their clinical information and education about their specific conditions. A patient not engaged in their own care can benefit from, and may become engaged by, the basic and useful features available in many portals: requesting prescription refills, receiving appointment reminders and

submitting payments. One study found that patients who used the secure messaging feature (patient emails) to interact with the care team led to early clinical interventions such as non-routine appointment scheduling or laboratory testing.ⁱⁱⁱ

Several portal studies focused specifically on patients with hypertension and diabetes where findings generally followed the broader portal studies. These studies found that people with

hypertension and diabetes were no more or less likely to use the portal. However, one study did find that diabetic patients engaged in using the portal experienced improved outcomes including reduced A1c and cholesterol levels.ⁱ The greatest impact from portal use was found to be from patients who were required by their provider to author a Diabetes Care Plan within the portal prior to an appointment, resulting in a lowering of the medication needed to control their conditions.ⁱⁱ

[Conclusion](#)

Hypertension and diabetes can be effectively managed with a partnership between patients and their providers. Organizational efforts, with regards to the portal, should focus on increasing portal utilization among patients that could benefit most from the portal. The patient portal provides a tool that can increase health literacy, improve communication between patients and their care teams, and strengthen the patient-provider partnership. It is important to remember that the portal is not intended to be a replacement for, but a



supplement to traditional office-based care by keeping patients engaged between visits. However, both patients and providers need to believe in the portal's benefits and that message is a critical component for marketing efforts. The portal may be the missing link to increasing patient engagement, which is the precursor to self-management.



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Holzer Health System



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