



## Clinical Informatics in Physiatry

# It Takes Two to Tango: Engaging Patients and Providers With Portals

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**Abstract**

Patient portals are designed to be tools to more fully engage patients in their health care and help enable them to better manage their own health information. As the U.S. health care system rapidly adopted electronic health records (EHRs) over the past decade, many with linked patient portals, enthusiasm and expectations for this new technology as a means to engage and empower patients grew. Most patient portals have a set of core features designed to facilitate health care transactions, information tracking, and communication with care team members. The evidence supporting the anticipated benefits of patient portals on patient outcomes, however, remains mixed and incomplete. Moreover, a paradox exists in that, despite a high consumer interest in patient portals, widespread adoption remains relatively low. Potential reasons include the need for greater provider endorsement, examination and adaptation of clinical workflows, and the recognition of patient engagement as a reciprocal process.

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**Introduction**

As citizens of the information age, we have seen unprecedented advances in technology and access to information. We have seen a dramatic growth in public engagement with technology, manifested by the proliferation of mobile devices (smartphones) and consumer-facing mobile health applications. Nearly 90% of American adults and teenagers use the Internet [1], including those living in poorer households, and over 90% of adults owned cell phones. Although Internet use in general remains lower among the less educated and adults 65 years and older, rates of use continue rising within these subgroups as well. As the Millennial generation grows older, the “digital divide” will likely continue to narrow, whereas the societal expectation that online services will be universally available will continue to expand.

In health care, this shift has helped lead to the rapid development of consumer health information technology and a transformation in how patients interact with the health care system. Over 70% of adults report searching online for health information, and over one-third attempt to diagnose a problem that they or someone else are experiencing [2]. Patients and their caregivers also express a strong desire to use tools such as e-visits,

home health monitoring, and online communication with their providers [3]. Coupled with a paradigmatic shift toward more patient-centered care, it has created a new era of patient engagement and empowerment.

In the past decade, the United States has rapidly adopted electronic health records (EHRs), driven largely by the Meaningful Use (MU) initiative. This \$30 billion program, part of the Health Information Technology for Economic and Clinical Health (HITECH) Act of 2009, dramatically accelerated the investment in and use of EHRs in the U.S. health care system. The MU initiative authorized financial incentive payments and penalties based on compliance with certain criteria. Recent estimates have shown that over 75% of hospitals use at least a basic EHR, up from less than 10% in 2008 [4].

These EHRs are now commonly linked to patient portals, which have become an important pillar of patient-centered care and engagement. Providing patients access to their health information and tools to use that information helps to better position them to participate more completely in their care: through improved communication with their care teams, coordination of care across multiple providers and health systems, and resources and information to help self-manage their conditions.

Simultaneously, the transition of the U.S. health care system from a fee-for-service to a value-based care model has begun. Providers will be rewarded for improved patient outcomes, but also will be held responsible for managing the cost of care through more responsible use of resources. Success in this new environment will depend on improving the health and well-being of patients with a greater emphasis on prevention, while providing care in the most efficient manner possible. In this new era of health care, providers and health care systems must use technology to enlist their patients as partners in their care and to better analyze the value of the care that they are providing.

Patient-centered care is a key component of many efforts to transform care delivery and to improve population health. Although a large survey of 7.5 million patients of a large EHR vendor revealed that 87% wanted electronic access to their health records, only 37% had such access through a patient portal. Nationwide, the average overall portal adoption rate is only 29% [5]. Despite high consumer interest in patient portals [6-8] and a growing availability [9], widespread adoption remains low [10]. Studying the factors that influence implementation and adoption of patient portals is essential to success. In addition to consumer preferences and experience considerations, provider endorsement and adaptation for care team and delivery system workflows play a significant role in the success or failure of patient portals, and are necessary to achieve and sustain anticipated positive outcomes [11].

There is broad agreement that the social and organization changes that come with more patient access and engagement through the portal represent an important culture change for medicine [12-16]. Patient portals have the potential to help health care providers to move from a conventional, episodic relationship with their patients to a more continuous, collaborative one that encourages active participation in their care, more judicious use of resources, and improved patient outcomes. Realizing this potential, however, requires a comprehensive understanding of patient portal use by patients, care givers, providers, care teams, and health systems, and the complex ways in which they interact.

The purpose of this narrative review is to survey and synthesize a representative sample of the available evidence on patient portals, highlighting the following: the catalysts and drivers of their emergence; the most common features; the potential and proven impact on health care; and factors influencing successful implementation and sustained use by both patients and care givers, as well as providers and care teams.

## Methods

PubMed, LISTA and Scopus were searched for peer-reviewed literature in English published between January 2006 and September 2016. We searched for

literature on both patient portals and electronic personal health records (PHRs), because the terms are often used interchangeably in the literature and are relevant to this review.

We selected the articles to be included in the review by assessing each article's title and abstract and excluding those not presenting some evaluation of EHR-linked patient portals. The primary reviewer (S.D.S.) reviewed all articles, whereas the second reviewer (D.L.) reviewed a random sample of 10%. The agreement rate was 95%, and disagreement was resolved through discussion. Additional relevant articles were selected and included via reference mining as well.

## Discussion

### *Patient Engagement*

The patient-centric definition of patient engagement by the Agency for Healthcare Research and Quality (AHRQ) is "the involvement in their own care by individuals (and others they designate to engage on their behalf), with the goal that they make competent, well-informed decisions about their health and health care and take action to support those decisions" [17,18]. From a systems perspective, AHRQ also defines patient engagement as "a set of behaviors by patients, family members, and health professionals and a set of organizational policies and procedures that foster both the inclusion of patients and family members as active members of the health care team and collaborative partnerships with providers and provider organizations" [18].

Patient engagement and patient-centered care are now considered pillars of a high-functioning health care system, and crucial to efforts to improve the value of care. Survey data has shown that over 80% of U.S. Internet users have searched for health information online [19]. Information is an important resource for patients and their caregivers facing a health condition. At its best, it helps them to understand and contextualize diagnoses, lessen fears and misconceptions, and facilitate management plans. The management and exchange of this health information—with family members, caregivers and members of their care team—is an important part of self-management and shared decision making. Engaged patients—those who seek out information about their health and attempt to take a greater role in managing it—are more likely than others to participate in healthy behaviors, stay updated with their preventive care, self-manage their conditions, and achieve better outcomes [20-22]. An AARP study defined "activated" patients as those with the knowledge, skills, and confidence to manage their own health care. These patients were twice as likely to avoid a readmission to the hospital, half as likely to experience a medical error, and 3 times less likely to suffer a negative health consequence

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