CASE STUDY

eClinicalWorks

CARSON MEDICAL GROUP, OF NORTHERN NEVADA

COVERING FAMILY MEDICINE, PEDIATRICS, OB/GYN, EAR, NOSE & THROAT MEDICINE, AND PAIN MANAGEMENT

improving healthcare together

eClinicalWorks

Carson Medical Group, Carson City, Nevada

Growing Patient Engagement in an established practice

The Challenge

Encourage staff and patients at a well-established, multi-specialty medical practice in northern Nevada to adopt new technologies and Patient Engagement tools in order to streamline workflows and improve the quality of care.

The Solution

Beginning with its family medicine group in 2011, Carson Medical Group began widespread implementation of Patient Portal, Messenger, and healow apps from eClinicalWorks, and steadily spread their use to the entire clinical staff, while encouraging their adoption among patients.

The Results

Through consistently demonstrating Patient Portal to patients, and offering incentives for those who used it, Carson Medical Group achieved steady increases in the use of online engagement tools, met Meaningful Use requirements, and increased office efficiency.

Change Comes to Northern Nevada

Founded in 1974, Carson Medical Group is a multi-specialty group practice serving thousands of patients in Northern Nevada. Carson's 25 board-certified physicians, along with registered nurses and office support staff, cover family medicine, pediatrics, obstetrics and gynecology, pain management, and ear, nose and throat medicine.

Like many long-established medical practices, the medical providers and staff at Carson had spent years focusing on care delivery and built a reputation for excellence throughout the region. They were far more comfortable focusing on medicine than struggling with the new world of government incentive programs, shifting payment models, and the arrival of electronic health records — even though they recognized the importance of remaining current with emerging technologies and requirements.

Although Carson Medical Group had begun working with eClinicalWorks in 2007, it was not until 2011, with the arrival of Meaningful Use requirements, that the practice turned its attention to maximizing the use of available patient engagement tools, beginning with the Patient Portal for online communications and lab results.

That process was not always an easy one.

"For us, it was mostly because of Meaningful Use," said Marie Sanders, Clinical Services Manager at Carson. "It didn't take us long to realize it would be good for the patients to actually utilize the Portal, so we did it as a have-to and then it ended up being really exciting for us."

Carson decided to begin the rollout of Patient Portal in their family practice, which has long served as a place for piloting initiatives, since it affords the practice the opportunity to see how families will respond – including moms and dads, their kids, and aging parents.

Implementing Patient Portal

Carson Medical Group's experience with patient engagement tools illustrates how much can be done through determination, persistence, and a bit of creativity. As with many initiatives — in medicine or other fields — success is determined by patience and teamwork.

Once the decision to begin using Portal had been made, the problem became one of logistics and implementation. Providers began to speak with their patients about Patient Portal, spending a few minutes at the end of their regular office visits, and even demonstrating how easy it is to log in, and read and send messages. Email addresses were gathered. Within six months, the new patient engagement tool had spread well beyond family medicine to include all Carson's specialties.

"It was rough in the beginning for me to learn it," said Janet Turner, Carson's front office manager. "I was told, 'Well, why don't we start and you can let the employees know what this is all about?' And I can remember saying 'I don't even know what it's all about!' So learning it and then trying to spread it to all the departments and all the employees, for me was a little tough, because it was really just kind of trial and error."

In a sense, the entire healthcare industry has been engaged in a similar process as medicine has entered an era of Big Data, seemingly limitless — and sometimes contradictory — online resources, and ever-shifting government rules and regulations.

One thing that is not in question is that patient engagement is a key element in improving health outcomes, and that engaging healthcare consumers online is important.

An October 2015 article in Health IT Outcomes, for example, reports that 5% of the approximately 4.7 billion daily Google searches are for health-related information. That's 235 million health-related queries each day. And more than three-quarters of all patients who booked an appointment with a healthcare provider had conducted an online search prior to making that appointment.[1]

1 http://www.healthitoutcomes.com/doc/the-importance-of-patient-engagement-and-technology-0001
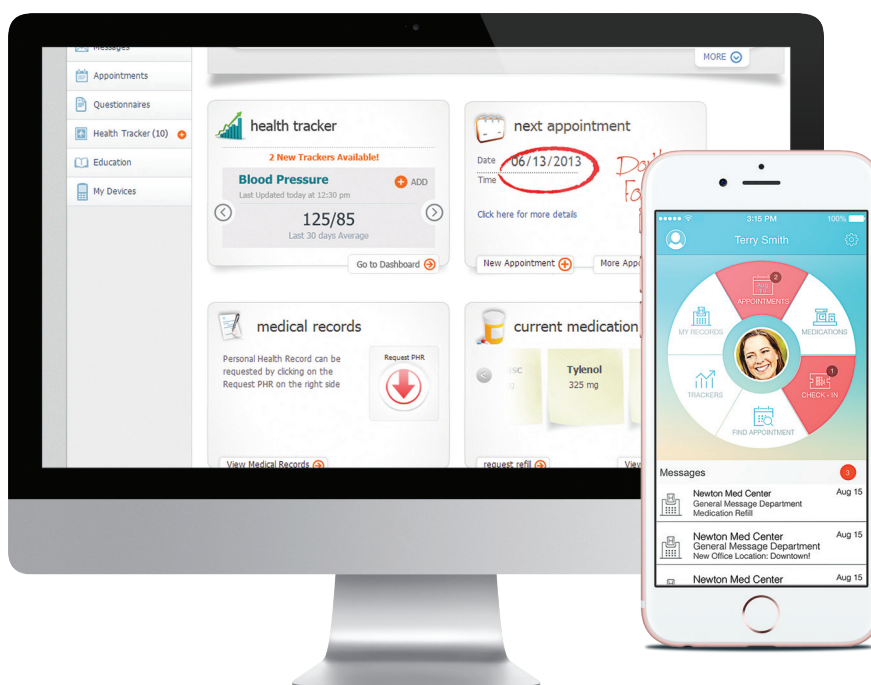
Still, knowing that Patient Engagement matters is one thing; getting providers to embrace the tools needed to make engagement happen was another.

Getting providers on board

At first, Carson's medical providers were not eager to embrace patient engagement tools.

"They took a lot of convincing," Sanders said. "Back in 2011, their biggest fear was 'This is my record, and I don't want my patient to see what I'm writing.' There were a few ways around that. One, we took screenshots of what their actual Progress Note looked like, compared to what a patient saw on a visit summary on the Portal and how we could control some of those things that are there."

Sanders noted that laboratory results were also an issue. Physicians were concerned that if they simply were to publish all lab results to the Patient Portal, patients would see the results and might call them before they had had a chance to review the results, decide upon a course of treatment, and communicate that to the patient.

But the Health Insurance Portability and Accountability Act of 1996 had fundamentally shifted the physician/patient relationship with regard to patient records.[2]

"They were afraid of the patient calling them on something – 'Hey, you said that I was 'rotund' in the notes,' " Sanders said. "It took some convincing, saying they [patients] could get these records at any time, thanks to HIPAA. These are the patients' records, they are not your records."

The increasing power and sophistication of the software soon alleviated physicians' concerns. As they learned more about the products, their confidence grew.

"Our providers have grown as the Portal has grown," Sanders said. "I think it's been nice that we started when we did, and the providers have grown and adapted it as the functions have changed. Now, they're so much more comfortable, everything is published to the Portal automatically, as opposed to how it used to be."

"There was a little pushback at first," acknowledged Dr. Amy Hayes, a member of Carson's obstetrics and gynecology group. "People were a little worried that it wasn't secure, and there were several people

Sanders added that it's not just a matter of getting providers on board, but having the entire clinical staff buy into a new system. That includes have nurses and medical assistants trained to mention Patient Portal to patients each time they interact with them.

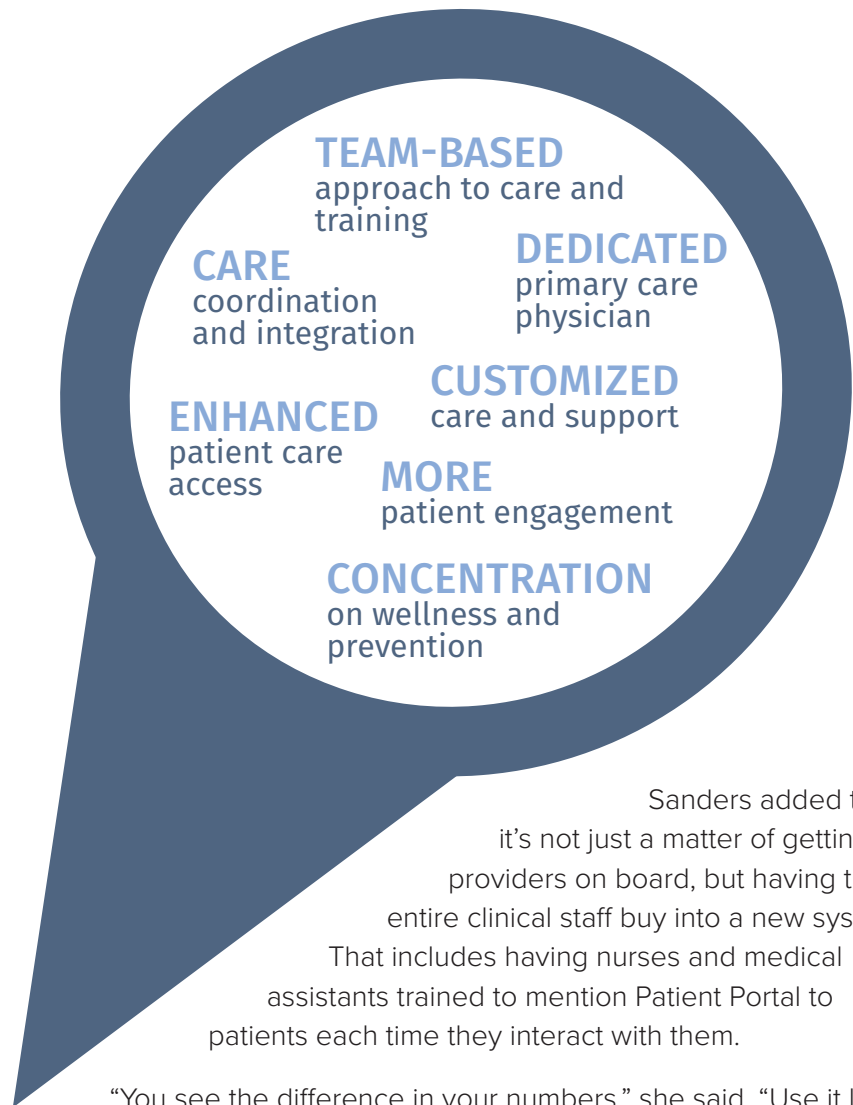2   http://www.hhs.gov/hipaa/for-individuals/medical-records/

who thought it would be difficult. Once I was able to show them the healow app, then they don't have to remember their login and their password. And I think the fact that I tell people I use it and I hand them the piece of paper and say 'This is really important and this allows you to have a direct line to my assistant and me,' is useful."

What Is Patient-Centered Medical Home? The Patient-Centered Medical Home (PCMH) is best described as a model of primary care that is patient-centered, comprehensive, team-based, accessible, and focused on quality and safety.

It is augmented by robust health information technology, provider/patient reform based on patient outcomes and health system efficiencies, and team-centered education and training.

TEAM-BASED approach to care and training

CARE coordination and integration

DEDICATED primary care physician

ENHANCED patient care access

CUSTOMIZED care and support

MORE patient engagement

CONCENTRATION on wellness and prevention

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"You see the difference in your numbers," she said. "Use it like a vital sign, when you check your patient in, say 'Hey, are you on the Portal? Are you web-enabled? If you're on the Portal, that's how we are going to send you your records and lab results.' We have a huge practice that has long hold times – oh, you don't like those hold times? Use the web. You can send us a message and it comes right in. You never have to talk to the front desk, you never have to be on hold for 20 minutes."

6 Benefits of Coordinated Patient Engagement Tools

- Personal Physician
- Physician Directed Medical Practice
- Whole Person Orientation
- Enhanced Access
- Quality and Safety
- Care Is Coordinated & Integrated

Strengthening patient relationships

Introducing patient engagement tools throughout Carson Medical Group was an important step, but ensuring that those tools would remain in place required that providers and staff engage in some gentle marketing — and relationship building — with patients.

Turner, who served as the practice's first "Portal ambassador," recalls one older patient with whom she had frequent phone conversations about Patient Portal.

"It was like 'Hi, good morning Janet, I'm calling to have coffee with you, do you have your coffee? Because now I have another Portal question,'" Turner said. "We literally developed a relationship on the phone, via the Portal. Finally, he came in and said 'I just need to meet you in person because I have coffee with you two or three mornings a week!'"

Turner used that example to illustrate how front-office staff can go about building a strong relationship with patients, striking a balance between moving them in the direction of new technologies while respecting their needs and limitations.

"We're not forcing them, we don't want to pull their teeth," she said. "That's not what we want to do. But we do want to show them a way to communicate better with us without the hold times, without the frustration. When you first start out it is a little frustrating for the patient learning it, but it doesn't take much to get them. If you can just capture their attention and be excited about it, I think that really makes all the difference."

Adding a bit of creativity

Another way that Carson Medical Group captured the attention of its patients was through some home-grown marketing.

By October 2014, the practice had had considerable success implementing Patient Engagement tools. But while some doctors were using Patient Portal successfully, others remained resistant. Progress had stalled, and uneven adoption rates were jeopardizing the practice's ability to meet compliance measures used by the Centers for Medicare & Medicaid Services for calculating reimbursement rates.

"We didn't realize how much we could reach out," Turner said. "I don't know why it never dawned on me to just call eClinicalWorks and see what we're supposed to do! Then, when we decided to do a Portal campaign, we would have these meetings and brainstorm, and say 'How is this going to be different than what we've done in the past?'"

That something turned out to be simple and effective. Styled on the famous "Got Milk?" advertising campaign, the idea was to put "Got Portal?" on what the practice calls "obnoxious lime green" tee-shirts. Each Wednesday, staff wore the shirts, which soon elicited queries from patients. Carson then added a contest: Any patient who went onto the Patient Portal and sent a message to their healthcare provider would be entered in a drawing to win $50.

"The thought behind that was if they can send us a message that says, 'Enter me in the drawing,' then they're going to get comfortable sending a message that says, 'I'm not feeling real great, not sure if I need to come in,'" Turner said.

Sustaining changes in the practice

Carson Medical Group's experience with Patient Engagement tools illustrates how much can be done through determination, persistence, and a bit of creativity. As with many initiatives — in medicine or other fields — success is determined by patience and teamwork.

One of the most interesting results to emerge from Carson's Patient Engagement campaign was the realization that older patients were more likely than younger ones to make consistent use of online communication tools.

Carson Medical Group's experience with patient engagement tools illustrates how much can be done through a combination of determination, persistence, and a bit of creativity.

"We found that people from 55 to just under 70 are our highest utilizers of the Patient Portal, which was unusual and surprising to us," Sanders said. "We thought it would be the younger crowd."

That is likely a function of young people being generally healthier and thus feeling less need to check in with their doctor on a regular basis.

Carson also found that adoption of Patient Portal lagged in its pediatric practices, although the reason was not a lack of interest, but parents' need to get answers as quickly as possible about their kids' health. A mother or father worried about their child's illness wants reassurance as soon as possible, and thus tends to pick up the phone and call.

In time, however, Carson expects to see the pediatrics area increase its use of Portal as parents recognize its utility for appointment booking, immunization reminders, and other non-urgent purposes.

Messenger and beyond

Moreover, since the successful implementation of Patient Portal, Carson Medical Group has seen success with other Patient Engagement tools, notably Messenger, which they have used to send out more than 200,000 appointment reminders. They have also used the built-in health and wellness campaigns included in the eClinicalWorks software, and those efforts have helped Carson meet the requirements of Meaningful Use.

"We've had our appointment reminders for the annuals on for years, that runs in the background," Turner said. "We see the progression of the campaigns, how we can use that with Messenger. So it's been very nice."

"I love the Portal," said Dr. Hayes. "And, more importantly, my medical assistant loves the Portal, and that is a big part of how I sell it. I explain to patients that by utilizing the Portal, they can communicate with us 24/7. People can send me messages, I can see those messages and respond to them, without interrupting my patient flow, and without playing phone tag with patients."

"Especially with my OB patients," she added, "we are talking to them frequently about lab results and information, so almost all of my obstetrical patients are on the Portal, that's just an expectation." ■

Patient-Centered Medical Homes (PCMH) are transforming primary care practices into what patients want, focusing on patients themselves and all their healthcare needs. More than 10% of U.S. primary care practices, approaching 7,000 altogether, are recognized as PCMHs by the National Committee for Quality Assurance (NCQA), which has the nation's largest PCMH program.