Andrew N. Pollak, MD
CHAIR

MARYLAND
HEALTH CARE
COMMISSION

Ben Steffen
EXECUTIVE DIRECTOR

Engaging Patients Using Telehealth

Overview

Patient engagement is a continuous process in which providers, patients, and caregivers work together to improve health. This process is an integral part of health care; engaged patients are able to make more informed decisions about their care options, and resources are better utilized when they align with patient priorities.[1]

Telehealth can help increase patient engagement by expanding access to services and improving continuity of care.[2] As a catalyst for trust in the provider and patient relationship, patient engagement in telehealth requires the same standards of professionalism as in-person care. Also important is exhibiting ease and proficiency using technology when interacting with patients.[3]

In using telehealth, as with in-person care, follow ethical guidelines such as:

- Taking steps to ensure care continuity;

- Protecting confidentiality of patients' electronic data while receiving, storing, and transferring the data; and

- Respecting the patient's decisions about their care and participating in telehealth.

Provider Tips

Patients engaged in their own care often experience better health outcomes.[4] The following themes support virtual care and successful patient engagement: (1) personalization, (2) access to necessary resources, (3) commitment to delivering quality care, and (4) building a positive patient-provider relationship.[5]

Tailor communication and services

Communication between patients and providers should reflect the provider's commitment to the patients' health and be respectful of their unique preferences, values, and health goals.[6] Understand patient goals and share enthusiasm for helping them reach those goals; consider having a care team member follow up with patients or engage caretakers.[7]

---

[1] World Health Organization, Patient Engagement, 2016. Available at: apps.who.int/iris/bitstream/handle/10665/252269/9789241511629-eng.pdf;jsessionid=B329DBCB34226C689EF27354824CF076?sequence=1.

[2] American Medical Association (AMA), Telehealth Implementation Playbook. Available at: www.ama-assn.org/system/files/2020-04/ama-telehealth-playbook.pdf.

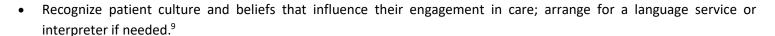[3] AMA, Ethical Practice in Telemedicine. Available at: www.ama-assn.org/delivering-care/ethics/ethical-practice-telemedicine.

[4] Barello S, Triberti S, Graffigna G, et.al, eHealth for Patient Engagement: A Systematic Review. *Front. Psychol*., (2016). Available at: www.frontiersin.org/articles/10.3389/fpsyg.2015.02013/full.

[5] Patient Engagement HIT, How Can Healthcare Professionals Define Patient Engagement? Available at: patientengagementhit.com/news/how-can-healthcare-professionals-define-patient-engagement.

[6] Health IT Outcomes, Consistent Communication Helps Providers Deliver Better Healthcare Experiences, March 2019. Available at: www.healthitoutcomes.com/doc/consistent-communication-helps-providers-deliver-better-healthcare-experiences-0001.

[7] AMA, Digital Health Implementation Playbook Step 9: Patient Partnership. Available at: www.ama-assn.org/practice-management/digital/digital-health-implementation-playbook-step-9-patient-partnership.

- Use multiple communication methods (e.g., patient portal, website, email, text messages, phone calls) to:[8]

  - Showcase benefits of telehealth, including increased convenience and access to specialized care;

  - Educate patients about using telehealth with guidance on things like downloading needed applications, the telehealth process and what to expect, and payment and billing;

  - Collect patient satisfaction feedback and schedule follow-up care; and,

  - Keep patients up to date on new telehealth services and capabilities available to them.

- Recognize patient culture and beliefs that influence their engagement in care; arrange for a language service or interpreter if needed.[9]

Prepare needed information and resources

Educating patients about their health, treatment plans, potential outcomes, and other information can empower patients and equips them with the knowledge necessary to make healthcare decisions.[10]

- Make available information on frequently asked questions before and during the telehealth interaction, including topics such as:[11, 12]

  - Verifying patient identity by providing personal information or documentation;

  - Maintaining privacy and confidentiality of patient information;

  - Collecting patient consent to participate in telehealth service(s);

  - Providing feedback following the telehealth encounter; and,

  - Scheduling follow up care if needed.

- During the telehealth encounter, provide visual materials (e.g., pain scales, care instructions) that are specific, clear, and concise to improve patient/caregiver understanding.[13, 14]

Don't let technology impede quality

Attentiveness to patients and their needs (above technology highlights or challenges) is central to principles of respect and dignity for patients as active participants in their own care.[15]

---

[8] *See n. 2, Supra.*

[9] Nickel W, Weinberger S, Guze P, Principles for Patient and Family Partnership in Care: An American College of Physicians Position Paper, *Annals of Internal Medicine,* (2018). Available at: annals.org/aim/fullarticle/2716698/principles-patient-family-partnership-care-american-college-physicians-position-paper.

[10] Patient Engagement HIT, The Difference Between Patient Education and Patient Health Literacy, June 2017. Available at: patientengagementhit.com/news/the-difference-between-patient-education-and-health-literacy.

[11] *See n. 2, Supra.*

[12] AHIMA, Telemedicine Toolkit (2017). Available at: healthsectorcouncil.org/wp-content/uploads/2018/08/AHIMA-Telemedicine-Toolkit.pdf.

[13] *See n. 2, Supra.*

[14] Hersh L, Salzman B, Snyderman D, Health Literacy in Primary Care, *Am Fam Physician,* (2015). Available at: aafp.org/afp/2015/0715/p118.html.

[15] Nickel W, Weinberger S, Guze P, Principles for Patient and Family Partnership in Care: An American College of Physicians Position Paper, *Annals of Internal Medicine,* (2018). Available at: annals.org/aim/fullarticle/2716698/principles-patient-family-partnership-care-american-college-physicians-position-paper.

- Review and familiarize yourself with the patient's health record before initiating a virtual visit.

- Ask targeted questions about the present illness and health history following key clinical guidelines.

- Familiarize yourself with common technical concerns (e.g., echoing audio, allowing access to the camera and microphone, browser compatibility) to help patients deal with issues they might encounter.

Build a positive relationship with patients and caregivers

Engaging patients as partners in health care requires patient-provider relationships founded on trust. Telehealth can help build strong connections between providers and their patients when competent care is provided.[16]

- Don't neglect the human experience; patients will be more satisfied with a telehealth encounter if they feel the care is customized and important, and the provider maintains a warm and personal bedside manner.[17]

- Setting expectations about what patient data will look like and what data points are normal vs. those that may cue the need for medical intervention.[18]

- Include patient's family members in the engagement/education process.[19]

Preparing patients and caregivers to use telehealth helps ensure they…[22]

- Are confident with the technology;

- Participate and generate accurate data;

- Know how their data will contribute to their care; and

- Feel empowered to troubleshoot issues.

Additional Resources

American Medical Association (AMA), Telehealth Playbook
www.ama-assn.org/system/files/2020-04/ama-telehealth-playbook.pdf

Maryland Health Care Commission (MHCC), Telehealth Virtual Resource Center
mhcc.maryland.gov/mhcc/Pages/hit/hit_telemedicine/hit_telemedicine_virtual_resource.aspx

The Office of the National Coordinator for Health Information Technology (ONC), Patient Engagement Playbook
www.healthit.gov/playbook/pe/

Questions?

Contact us at mhcc.telehealth@maryland.gov.

---

[16] AMA, Ethical Practice in Telemedicine. Available at: ama-assn.org/delivering-care/ethics/ethical-practice-telemedicine.
[17] For more information on making the most of a telehealth visit see MHCC's Making the Virtual Visit A Success – Provider Tips for Telehealth, available at: mhcc.maryland.gov/mhcc/pages/hit/hit/documents/HIT_Telehealth_Visit_Flyer.pdf.
[18] *See n. 2, Supra.*
[19] MHCC, Remote patient Monitoring Telehealth Grants, Brief and Final Reports, (March 2017). Available at: mhcc.maryland.gov/mhcc/pages/hit/hit_telemedicine/documents/Telehealth_Brief_Reports_FINAL_031617.pdf.
[20] *See n. 2, Supra.*