



Patient and Family Engagement

This job aid includes a few key strategies you can use to begin increasing patient and family engagement in your practice. Caring Contacts, Shared-Decision Making, and Giving Patients Access to their Medical Records.

Caring Contacts

Caring Contacts are brief communications with patients during care transitions, such as when discharged from treatment, or when patients miss appointments or drop out of treatment. These contacts, through which providers continue to show support for a patient can promote a patient's feeling of connection to treatment and increase their participation in collaborative treatment.

Examples of caring contacts include:

- Postcards, letters, email messages, and text messages. Automated systems can be used to send any of these, as can some EHR systems. Some EHRs allow for two-way communication between client and provider, which can help maintain support for the client between appointments
- Phone calls made by clinical or non-clinical staff, including peers who have similar lived experience. Individuals making phone contacts must be trained.
- Home visits.

Sample caring contacts messages:

- Sometimes you just need to know someone cares about you.
- Thinking about you.
- We are here for you.

Jeff, thank you for coming in today and for answering all the questions. I know you were not comfortable. Based on our brief time together, I can see that you know how to get through hard times. I wish you didn't have to be - but it seems to me you are very strong.
-Ursula

Thinking of you today. I am so glad we met and I am looking forward to seeing you next month. Thank you for being so real with me!

-Joeden

<https://zerosuicide.edc.org/resources/resource-database/nowmattersnow-caring-contacts>

Shared Decision-Making

Shared decision making is the process of engaging with patients and families to make health care decisions together. It includes exploring and comparing the benefits and risks of each option within a clinical decision through meaningful conversations about what matters most to the patient.

Why is it important?

Shared decision making is an important approach to engaging patients in their own care. It allows patients to better understand their options for care and to make a decision that is both supported by medical evidence and consistent with their values and preferences. When patients participate in shared decision making, they are more likely to understand their care plan and more likely to follow through.

How can I start?

The SHARE Approach is a five-step process for shared decision making that includes exploring and comparing the benefits, harms, and risks of each option through meaningful dialogue about what matters most to the patient.

1. Seek your patient's participation
2. Help your patient explore & compare treatment options
3. Assess your patient's values and preferences
4. Reach a decision with your patient
5. Evaluate your patient's decision

Giving Patients Access to Medical Records: Open Notes.

The patient's record is just that... the PATIENT's record. Systems that give patients access to their notes have been associated with improved medication adherence, improved communication, increased understanding of care plans, greater patient and family engagement, and greater patient and provider satisfaction. Having access to patient notes helps patients better understand their diagnosis and plan of care and increases engagement in care.

Tips for getting started:

- Choose a patient portal that facilitates sharing of notes.
- Send an introductory email about your web portal and open notes
- Create an open notes page on your external website and patient portal. You can include links to stories and videos, FAQs, instructions for finding their notes in the HER, and other helpful resources.
- Create waiting room posters and materials to give patients at appointments.
- Let your patients know you about open notes on social media

Zero Suicide, Caring Contacts (Accessed April 2023). www.NowMattersNow.org
Sharing Open Notes Toolkit (Accessed April 2023). www.opennotes.org/implementation
AHRQ, The SHARE Approach (Accessed April 2023). <https://www.ahrq.gov/health-literacy/professional-training/shared-decision/index.html>

For questions, contact your Primary Care Representative directly or the Primary Care Department at primarycare@arkbluecross.com