

# Utilization of the EMR to Improve Family and Support Person Engagement in Health Care

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## INTRO

- The purpose of this study was to explore the experiences of patients, healthcare team members, and support persons as they interact within the patient's MyChart through a **Patient Portal Proxy** function.
- No known studies have previously examined engagement of family and support persons using the EMR
- Opportunity Study is guided by the biopsychosocial-spiritual (BPSS; Engel, 1977, 1980; Wright et al., 1996) and the patient-and family-engagement (PFE; Carmen et al., 2013) frameworks

## METHODS

- Phenomenological study analyzed using Colaizzi's (1978) seven-step method
- Sample: 12 patients, 7 support person, 2 primary care providers
- Recruited participants using a purposive sampling strategy (Birks & Mills, 2015)
- Setting: employee health primary care clinic
- Semi-structured individual interviews with patients and support persons
- Focus groups with primary care providers

## PARTICIPANTS

Race/Ethnicity	Patients	Support Persons	Providers
Non-Hispanic White, or Euro American	5	4	2
Black, Afro-Caribbean, or African American	5	2	0
Native American or Alaskan Native	1	1	0
Latino or Hispanic American	1	0	0

## Utilizing the EMR Proxy Feature led to:

- Increased patient accountability & treatment plan adherence
- “Having everybody on the same page” enhanced communication between providers, patients, and support persons
- Improved provider workflow

“Without my support person, I don't know where I'd be.”

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\*For more information on results please listen to accompanied audio recording and attend session B8 “Strategies for Engaging Family in Managing Patients with Complex Care Needs using EMR/EHR Systems”

## RESULTS

### - Themes and Sub-Themes

Patient Results
1) Pro-Proxy Patient Characteristics <ul style="list-style-type: none"> <li>Values support from others</li> <li>Trust proxy to access EHR</li> <li>Motivation to learn</li> <li>Reasons for lack of use</li> </ul>
2) MyChart
3) Who are Proxies <ul style="list-style-type: none"> <li>Traits of proxies</li> <li>Actions of proxies</li> <li>Outcomes resulting from support person engagement</li> </ul>
4) Proxy Access Improves Patient Care <ul style="list-style-type: none"> <li>Enhanced communication</li> <li>Promoted patient agency</li> <li>Facilitated health goal achievement through increased communion</li> </ul>

Proxy Results
1) Proxy Values and Views <ul style="list-style-type: none"> <li>Patient-proxy relationship</li> <li>Communication improves patient's care</li> <li>EMR isn't everything</li> </ul>
2) Pre-Proxy Engagement
3) MyChart Use
4) My Role as Proxy – I provide...
5) Proxy Access Improved Patient Care by Creating a More Cohesive Treatment Team
6) Proxy Access Was Not Necessary to Fulfill My Role

Provider Results
1) Providers' Views of the Support Person's Role
2) Ambiguity Surrounding the Support Person's Role Creates Challenges
3) Utilization of the EMR to Engage Support Persons <ul style="list-style-type: none"> <li>Positive views of EMR and proxy access</li> <li>Potential concerns of proxy access</li> <li>Outcomes of proxy access</li> </ul>

Study Feedback – All Participants
1) Challenges with Paperwork Onboarding
2) The Study was a Smooth Process
3) Suggestions for EMR

## DISCUSSION

- Recruitment for this type of study is challenging if requires paper vs electronic methods.
- Providers expected proxy access would negatively impact workflow but reported the opposite
- Overall, patient, support persons, and providers all found the MyChart Proxy function important to patient care.

### Implications

- Powerful too for family engagement and patient care