



Generational Considerations for Shared Decision Making

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INTRODUCTION

The Institute of Medicine defines patient-centered care as “providing care that is respectful of and responsive to individual patient preferences, needs, and values, and ensuring that patient values guide all clinical decisions.”¹ It is widely recognized that patients whose needs and preferences are taken into account have better healthcare experiences, are better equipped to make informed and personally relevant decisions about their care, have better clinical outcomes, and have lower healthcare costs.²⁻⁴ Shared decision making (SDM) improves patient adherence and outcomes by helping patients and providers identify patient preferences, needs, and values. Education on shared decision making equips providers and patients to enter into a productive and meaningful dialogue to define the patients’ treatment goals and to develop a mutually agreed upon plan of care. Patient engagement and shared decision

making also help providers meet the requirements of Meaningful Use Stage 2 and its successor, Advancing Care Information, that has been folded into the Merit-Based Incentive Payments System (MIPS) of the Medicare Access and CHIP Reauthorization Act of 2015 (MACRA).

Patient engagement results when patients/caregivers receive information and support that they need in order to fully participate in their care.

In 2015, Medscape Education surveyed WebMD.com site users to determine if and how generational factors might influence patients’ and care partners’ perspectives on patient engagement. The patient/care partner survey focused on perceived roles, desires, actions, confidence levels, and abilities to be engaged in their health care. In parallel, Medscape Education conducted a survey of physician members to better understand their patient engagement beliefs and behaviors, and how their and their patients’ ages might influence their care decisions. Medscape Education then examined how patient and provider beliefs and behaviors related to patient engagement and, further, if generational factors influenced beliefs and behaviors.

GENERATIONAL REPRESENTATION AND HEALTHCARE ARCHETYPES

According to Linda MacCracken, head of Accenture's Innovation and Thought Leadership, generational representation broadly impacts patient engagement, with the Silent Generation more likely to follow their doctors' orders, Baby Boomers more likely to debate with their doctors, Generation X patients more likely to get privately educated before they visit a physician, and Millennials looking for any connected health care.⁵ Research by MacCracken and her cohorts provides the following perspective⁶⁻⁷ on generational representation on healthcare archetypes. Medscape Education's 2015 patient survey results both corroborate certain previous research and literature findings and offer new perspectives and actionable insights.

Silent Generation Born prior to 1942



Literature Summary: "Direct Me"

The Silent Generation relies on their personal doctors to provide medical care direction. They are prepared to seek information from and defer to their physician. They have frequent and longer visits due to clinical acuity and patient preferences around medical care. Silent Generation patients have rigid definitions of good service, believing the customer is always right. In addition, they identify only physicians and nurses as health professionals.

2015 WebMD Survey Summary

The Silent Generation trusts their physicians. They are the most confident generation in their ability to take ownership of their own health and thereby be an engaged patient. However, they rely on their physicians to set them on the right course and defer to them on health-related topics. In addition, while they are digital immigrants, approximately 15 percent will sport healthcare wearables. They will also register for patient portals if doing so is recommended by their physician, but their use beyond lab data review is limited.

Baby Boomers Born 1943-1960



Literature Summary: "Engage Me"

Baby Boomers value individual healthcare engagement and identify only physicians and nurses as health professionals. They seek counsel from and bring information to the physician,

then research physician recommendations. They have an interest in quality, as evidenced by use of third-party comparisons or ratings as a means of self-directing to specialists and providers. Boomers are involved in decision making for aging parents while simultaneously informing the health needs for their children. As caregivers for their parents or children, they can create communication challenges for physicians because the primary healthcare decision maker may express Boomer values, while the patient expresses the values and concerns of a Silent Generation member or Millennial.

2015 WebMD Survey Summary:

Baby Boomers respond best to a physician's verbal instruction, followed by written, and then Internet, communication. This generation is moderately confident in shared decision making and patient engagement. Nearly 20 percent of Boomers use healthcare wearables.



Generation X Born 1961-1981

Literature Summary: "Educate Me"

Generation X patients are relatively healthy. They have an interest in being engaged and educated, and assume physicians and staff are knowledgeable. They are notably curious and actively

seek information. They are more likely to switch physicians and hospitals based on their most recent experiences, rather than their overall past experience. They have more in common with the Millennials than with the Boomers. They identify physicians, nurses, nurse practitioners, physician assistants, insurance companies, and pharmacies as medical professionals.

2015 WebMD Survey Summary

Generation X patients respond most to a physician's verbal instructions, followed by written and Internet communication equally. This group is mildly confident in shared decision making and engagement actions. Generation X patients use portals, but use them primarily for lab results, along with communication with their healthcare provider, scheduling, and medication refills. Nearly 20 percent of Generation X patients use wearables.



Millennials Born 1980-2000

Literature Summary: "Connect With Me"

Millennial patients access the health system through primary care providers (PCPs), urgent care centers, and obstetricians/gynecologists (OB/GYNs),

with a higher likelihood than other generations of using OB/GYNs as PCPs. They have low use of inpatient and outpatient services, but when they do use those services, they come through the emergency department or maternity ward. Millennial patients use and appreciate technology. They value health information and seek it from multiple sources. They also have a positive personal relationship with their physicians, but are more likely to switch physicians or hospitals if they lose confidence in the care provided based on recent experience.

2015 WebMD Survey Summary

Millennials respond most to a physician's verbal instructions, followed by written and Internet communication equally. However, they are a little less comfortable asking questions and discussing concerns than members of other generational cohorts. This generation is minimally confident in shared decision making and engagement actions. Nearly 20 percent use wearables.

20 percent are the Silent Generation, 20 percent are Generation X, and 3 percent are Millennials.

Where Patients Get Health Information

All surveyed generations rely primarily on verbal instructions from their doctors or other healthcare providers (HCPs), a source of information that evaporates once their healthcare appointments end. Silent Generation and Baby Boomers use written instructions from their doctors more than they use the Internet to help manage their health, while Generation X and Millennials use written instructions and the Internet equally. Regardless, a large percentage of all generations use the Internet as a source of information to help manage health. They do so of their own accord, as two-thirds of survey respondents note (with no generational difference), that their doctors or HCPs didn't recommend any Internet resource in the previous 12 months.

2015 PATIENT SURVEY RESULTS AND IMPLICATIONS

Medscape Education's patient survey (fielded on WebMD.com) results are based on 2600 survey respondents, each of whom had seen a healthcare provider for themselves or as a caregiver within the 3 months prior to completing the survey. More than half, 57 percent, of respondents were Baby Boomers,

Where do you get information to help you manage your health?

Where	Silent	Baby Boomers	Gen X	Millennials
Verbal instructions from doctor or HCP	84%	79%	88%	73%
Written instructions from doctor or HCP	51%	51%	48%	46%
Internet (websites)	40%	45%	46%	46%
Portal	13%	13%	11%	11%

(Shows who ranked these sources from 9 choices as his/her primary or secondary source.)



Patient Involvement in Care Plan Development

There are generational similarities and differences among patient engagement perspectives. Overall, people of all ages affirm they are responsible for their health, with strength nearly equal to ownership, and believe they take appropriate action. They also all value sharing healthcare decision making with their doctors and HCPs. However, there are generational differences in how people engage in their healthcare. Silent Generation and Boomers are more likely than the other generations to bring information they find about their condition on the Internet to show to their doctors and to follow provider medication recommendations. Boomers are more likely, though, to follow prescribed treatment plans without question than are other generations. Yet, only Silent Generation patients are more likely to make necessary lifestyle changes and stick to plans to exercise and eat healthy foods. The oldest and youngest generations, Silent Generation and Millennials, are less likely to know when to call their doctors in the first place. Furthermore, Millennials are statistically less comfortable talking to their doctors, asking questions, or bringing up concerns.

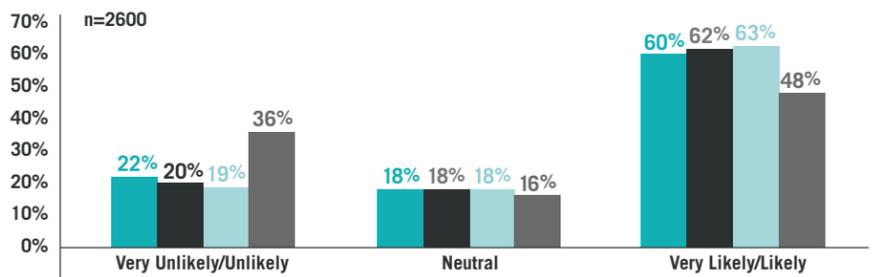
NO GENERATIONAL DIFFERENCES

- People of all ages feel responsible for their health and take action accordingly
- Shared decision making is valued by all

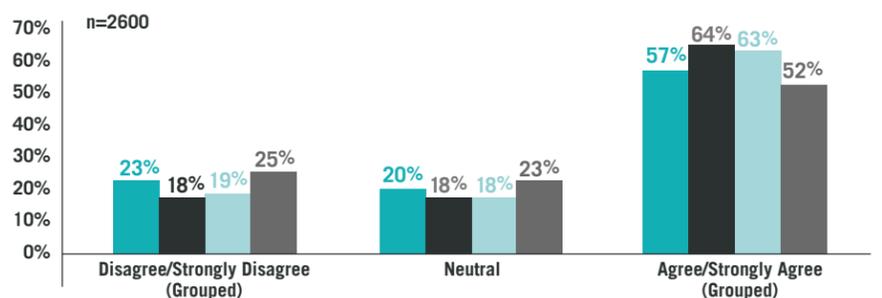
GENERATIONAL DIFFERENCES

- Silent Generation and Boomers more likely to follow provider recommendations regarding medication
- Silent Generation and Millennials less likely to know when to call their doctor than Baby Boomers and Generation Xers
- Boomers more likely to follow the prescribed treatment plan, no questions asked, than the Silent Generation, Generation X, and Millennials
- Silent Generation more likely to make necessary lifestyle changes and stick to plans to exercise and eat healthy foods than Boomers, Generation Xers, and Millennials
- Silent Generation and Boomers more likely than Millennials to bring information they found about their condition to show to their doctor
- Millennials are a little less comfortable talking to their doctor, asking questions, or bringing up concerns than Generation X, Boomers, and Silent Generation

How likely are you to bring information or education that you found on the Internet to your doctor or HCP?



Do you share healthcare decision making with your doctor or HCP?



Mean 3.77 across cohort
 Boomers (3.82), Silent Generation (3.65); significant difference at the 90% level

INTERPRETING THE DATA: 1 equals 'I follow the treatment plan as provided by the doctor or HCP, no questions asked' and 5 equals 'I am very involved in the development of the plan of care.' (1&2 disagree and strongly disagree grouped and 4&5 agree and strongly agree grouped).

IMPLICATIONS FOR HEALTHCARE PROVIDERS

The younger generation needs more help with engagement. Proactively question and discuss health issues with younger patients. Providers could utilize patient engagement helpers such as patient care coordinators and health coaches to motivate and support Baby Boomers, Generation X patients, and Millennials to follow treatment plans.

Patient Portal and Tech Tool Use to Manage Health

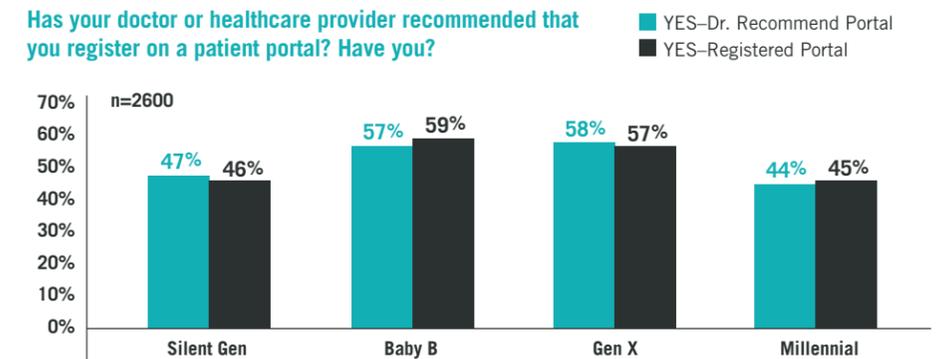
Patient Portal Use

All generations register for electronic patient portals, if doctors and HCPs recommend that they do so. More than half of Baby Boomers and Generation X patients use a patient portal. However, less than half of Silent Generation and Millennials use one. Across generations, portal use is limited, with patients predominantly using them to check lab or test results. They do also use portals, though, to communicate with HCPs, to schedule and cancel appointments, and to request prescription refills. However, Silent Generation patients are less likely to use the full capacity of portal services. A small percentage of patients across generations use the portal to check on benefits and coverage, with Millennials statistically more likely to use the portal for this purpose.

Wearables and App Use

Across generations, more than 40 percent of people are likely to use some form of wearable or app to help manage their health. However, Millennials are less likely to use tech tools than other generations, as indicated by a statistically higher percent of this generation disagreeing/strongly disagreeing about use of such technology tools for health management. For those who do not use wearables, cost is the primary reason, with Millennials statistically more likely to cite cost more than other generations. Lack of doctor recommendation is another primary reason for not using wearables, with the Silent Generation statistically more likely to cite this reason. While cited less often, all generations believe to a certain degree, without statistical difference, that wearables and apps aren't effective at changing their behavior.

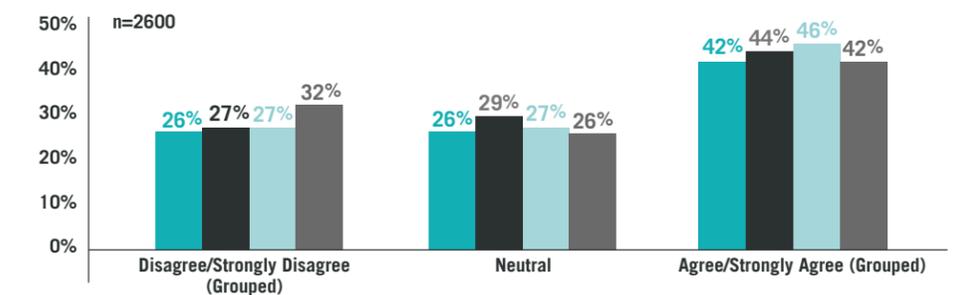
PATIENT PORTAL: DOCTOR RECOMMENDATION/SUBSEQUENT REGISTRATION



IMPLICATIONS FOR HEALTHCARE PROVIDERS

Doctors and HCPs are leaving Meaningful Use incentives on the table. Engagement tools are untapped in Millennials and the Silent Generation. Providers can drive patient engagement and increase incentives by proactively introducing, demonstrating, and "prescribing" patient portals to patients during patient visits. Practice administrative staff can then enroll patients in the portal during the patient visit. In addition, there is likely price sensitivity among Millennials inherent in their benefit and coverage checks.

Please rate your level of agreement with the following statements: /my dependent uses tools like checklists, apps, diaries, or fitness trackers (eg, Fitbit™, smart watch, pedometer) to help better manage the condition or disease (1=strongly disagree, 5= strongly agree)



IMPLICATIONS FOR HEALTHCARE PROVIDERS

Millennials may benefit from the incentive of free devices to use trackers. Older patients continue to look for direction from their healthcare provider and may increase use with doctor recommendation.



PHYSICIAN AND PATIENT ENGAGEMENT BELIEFS AND BEHAVIORS

Medscape Education surveyed physicians to gain comparative generational representation and overall provider insights. Of the 792 respondents, 15 percent are PCPs and 85 percent are specialty doctors. Nearly half of respondents are Baby Boomers and a little over a quarter are Generation X. Silent Generation members comprise approximately 15 percent, with Millennials and those who declined to answer each comprising less than 5 percent.

Patient Engagement Roles and Value

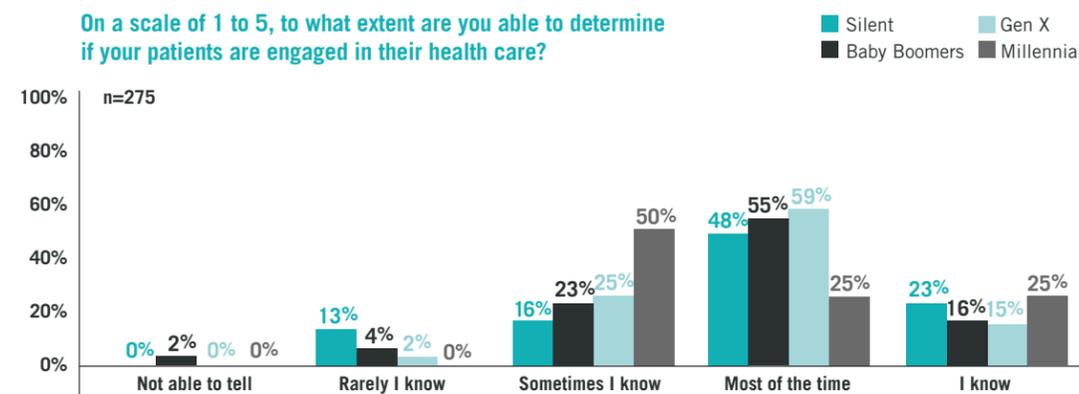
The majority of doctors, 70.9 percent, believe they are primarily responsible for patient engagement, compared with 23.2 percent who believe the patient is primarily responsible for engagement. The majority believe that patient engagement is time-consuming, and Generation X doctors are least likely to find it easy. Generation X doctors are statistically ($P < .01$) less likely to deem patient engagement “easy” as compared with Boomers and Silent Generation physicians.



doctors are fairly confident in their ability to assess their patients’ engagement, but they lack certainty. Millennials are less certain, with half feeling fairly confident or certain, and half only sometimes knowing when patients are engaged.

also likely to report that they consider patient values, beliefs, and preferences when recommending treatment plans. They are likely to gather input from patients, families, and caregivers and take the time to understand patient needs, challenges, support systems, and living situations when making treatment recommendations. Providers are least likely to explain to their patients how to use the Internet or other technology for healthcare information management. Provider survey results also show that only 31.1 percent of doctors currently employ a patient engagement support person,

On a scale of 1 to 5, to what extent are you able to determine if your patients are engaged in their health care?



such as a health coach, patient navigator, patient educator, or coordinator, to facilitate patient education and care coordination needs.

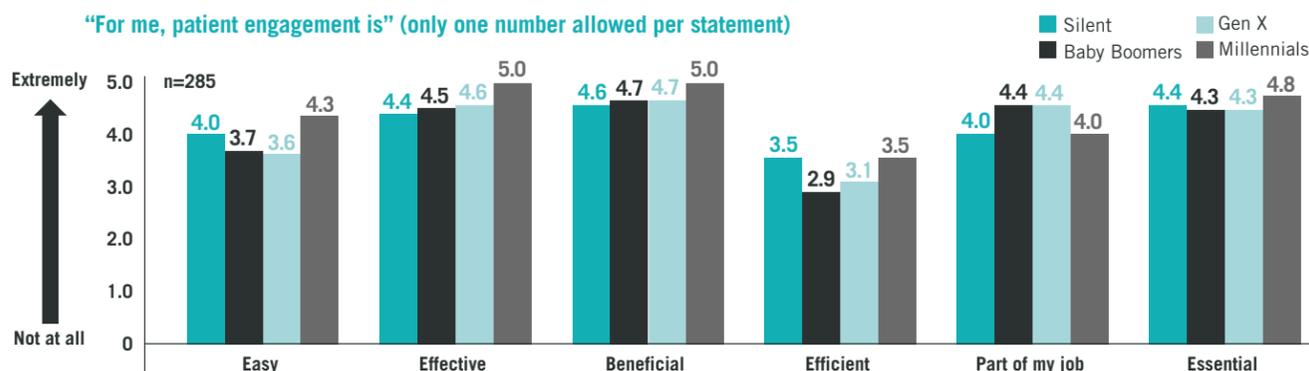
Patient Desire to Be Engaged

When asking physicians “How involved (engaged) do patients of different age groups want to be when it comes to decision making about their health and treatment plan?” there is a disparity between physician and patient perspectives on how involved different generational patient groups want to be in their healthcare decisions. Physicians across all age groups believe that Generation X and Boomers want to be more engaged in their care than Millennials and Silent Generation patients. Patient survey results indicate that this assessment is accurate for Millennials but is not accurate for members of the Silent Generation.

Per patient survey results, doctors may be making inaccurate assumptions about older patients’ technology capabilities, assuming that older patients aren’t very tech savvy. It might behoove physicians to ask assessment questions during the patient visit such as “Do you ever use the Internet to look at health information?” or “Do you own a phone or have cable that can connect to the Internet?” before assuming lack of tech savviness.

GENERATIONAL PERSPECTIVES ON THE ROLE OF PATIENT ENGAGEMENT

“For me, patient engagement is” (only one number allowed per statement)



Regardless, the majority of physicians believe that patient engagement is beneficial: 69 percent believe engaged patients take medications as prescribed; 62.6 percent believe these patients are honest about their health behaviors and medication adherence; 54 percent believe engaged patients come to their doctor with questions, 51.3 percent believe these patients use Internet resources to better understand symptoms and conditions, 51.9 percent believe engaged patients follow their medical advice, and 48.7 percent believe they reduce or eliminate unhealthy habits.

Determining Patient Engagement

With no statistical generational difference, physicians utilize the same indicators and metrics to determine how engaged patients and caregivers are in managing patient health. They primarily rely on patterns of nonadherence to treatment plans and medication regimens. They also depend on information gleaned during the patient’s visit, including behavioral clues and patients’ ability to verbally demonstrate understanding of conditions and treatment plans. Silent Generation, Boomers, and Generation X

Engaging Patients

Patient Engagement Strategies

Physicians across all generations use the same patient engagement strategies, primarily engaging patients via conversations during office visits, including discussing and providing treatment options. In addition, they believe that they take into account their patient’s health literacy and technology capability and adapt their communications and recommendations accordingly. The majority are

Per patient survey results, patient use of the Internet and other technology for health management implies there is opportunity for physicians to improve patient engagement between office visits by recommending trusted online resources. In addition, there’s an opportunity to employ or partner with a patient engagement helper such as patient care coordinator or health coach to increase post- and between-visit patient engagement and treatment plan compliance.

Using Electronic Patient Portals, Apps, and Wearables

In comparison with Medscape Education’s 2014 physician survey of PCPs, the 2015 provider survey shows that specialists are less likely to offer patient portals. The percent of doctors providing patients with access to their clinical data via electronic patient portals decreased from 55 percent in 2014 to only 45.3 percent in 2015. In the 2015 survey, 54.7 percent of doctors indicate that they do not provide or don’t know if they provide portal access. Access to electronic health information by patients and providers helps

to support collaboration and informed decision making.⁸ According to the California HealthCare Foundation, “patients pay more attention and become more engaged in their health and medical care when they have easy access to their health information online.”⁹ Therefore, doctors could, and should, increase adoption and functional use of portals by older patients by simply “prescribing” their use during a patient visit.

More than 68 percent of providers across age groups recommend the use of wearable devices such as a Fitbit™ or a smart watch to their patients, with 67.2 percent of those providers believing the primary benefit is to motivate patients to follow health and treatment plans. Baby Boomer physicians are nearly twice as likely as doctors from the Silent Generation to recommend apps to their patients and 3 times more likely to recommend wearables. Nearly half of providers who recommend using health apps believe the primary benefit is to help patients stay engaged in their health or disease management. Only 27 percent believe that health apps are motivational tools for patients to follow their health and treatment plans. Even fewer, 12.1 percent, believe in the use of health apps for collecting patient-generated health data to supplement clinical data.

The providers’ assessment aligns with over 40 percent of patients across all generations believing that apps and wearables help manage conditions and diseases. However, older patients who don’t use a wearable device or app cite their doctor not recommending them as a major reason. This suggests an opportunity for doctors to increase use by more clearly “prescribing” specific wearables and apps and explaining how to use them. Or, doctors may partner with third-party partners such as health coaches to provide, explain, and support the use of apps and wearables.

LESSONS FOR HEALTHCARE PROVIDERS

Providers who incorporate patients’ generational perspectives into their patient engagement strategies can improve patient engagement, treatment plan adherence, and patient outcomes. For patients across all age groups, providers need to supply or recommend tools that help patients stay engaged and follow care plans beyond and between patient visits. Effective tools range from a printed patient visit summary with recommended actions and resources to patient engagement helpers such as patient care coordinators and health coaches to technology tools such as patient portals, trusted online resources, apps, and wearable devices. Clinician recommendations or “prescriptions to learn” for these tools are critical, especially for older patients.

In addition, providers need to help younger patients more than older patients with engagement and need to be ready to engage Millennials digitally.

LESSONS FOR THE MEDICAL EDUCATION INDUSTRY

- Help HCPs understand that clinician recommendations/“prescriptions” are critical, especially with older patients, and HCPs should exploit “Tech Tools” beyond/between visits:
 - Patient portal (older patients less likely to use full functions)
 - Online resources patients trust
 - Apps
 - Wearables
- Encourage HCPs to print and deliver visit summary with recommended actions (and resources)
- Don’t assume older patients are not digitally savvy
- Younger patients need more help with engagement than older patients
- Millennials, particularly, are not likely to engage until they need to do so (become sick), and will need to be prepared to do so digitally once they are
- Doctors view patient engagement as essential; younger doctors find it more challenging than older ones. The medical education industry can help

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