

# Patient Engagement



■ ■ ■ **Technical Series on Safer Primary Care**



World Health  
Organization

Patient Engagement: Technical Series on Safer Primary Care  
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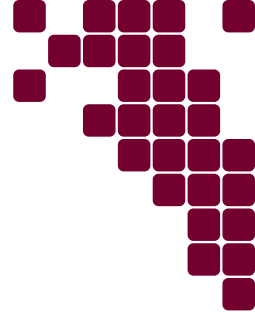
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# Preface

## Safer Primary Care

Health services throughout the world strive to provide care to people when they are unwell and assist them to stay well. Primary care services are increasingly at the heart of integrated people-centred health care in many countries. They provide an entry point into the health system, ongoing care coordination and a person-focused approach for people and their families. Accessible and safe primary care is essential to achieving universal health coverage and to supporting the United Nations Sustainable Development Goals, which prioritize healthy lives and promote well-being for all.

Health services work hard to provide safe and high quality care, but sometimes people are inadvertently harmed. Unsafe health care has been recognized as a global challenge and much has been done to understand the causes, consequences and potential solutions to this problem. However, the majority of this work up to now has focused on hospital care and there is, as a result, far less understanding about what can be done to improve safety in primary care.

Provision of safe primary care is a priority. Understanding the magnitude and nature of harm in primary care is important because most health care is now offered in this setting. Every day, millions of people across the world use primary care services. Therefore, the potential and necessity to reduce harm is very considerable. Good primary care may lead to fewer avoidable hospitalizations, but unsafe primary care can cause avoidable illness and injury, leading to unnecessary hospitalizations, and in some cases, disability and even death.

Implementing system changes and practices are crucial to improve safety at all levels of health care. Recognizing the paucity of accessible information on primary care, World Health Organization (WHO) set up a Safer Primary Care Expert Working Group. The Working Group reviewed the literature, prioritized areas in need of further research and compiled a set of nine monographs which cover selected priority technical topics. WHO is publishing this technical series to make the work of these distinguished experts available to everyone with an interest in *Safer Primary Care*.

The aim of this technical series is to provide a compendium of information on key issues that can impact safety in the provision of primary health care. It does not propose a “one-size-fits-all” approach, as primary care is organized in different ways across countries and also often in different ways within a given country. There can be a mix of larger primary care or group services with shared resources and small services with few staff and resources. Some countries have primary care services operating within strong national support systems, while in other countries it consists mainly of independent private practices that are not linked



or well-coordinated. The approach to improving safety in primary care, therefore, needs to consider applicability in each country and care setting.

This technical series covers the following topics:

**Patients**

- Patient engagement

**Health workforce**

- Education and training
- Human factors

**Care processes**

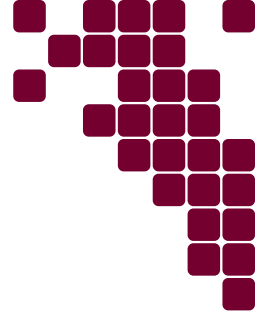
- Administrative errors
- Diagnostic errors
- Medication errors
- Multimorbidity
- Transitions of care

**Tools and technology**

- Electronic tools

WHO is committed to tackling the challenges of patient safety in primary care, and is looking at practical ways to address them. It is our hope that this technical series of monographs will make a valuable and timely contribution to the planning and delivery of safer primary care services in all WHO Member States.





# 1 Introduction

## 1.1 Scope

Health care systems are complex and include multiple stakeholders and providers. People using health care services have an essential role as co-producers of their health and indeed they represent the only consistent factor throughout the care pathway. They also hold key information vital for process, systems and policy improvement. Tapping into such a rich resource could contribute significantly to improving safety in primary care.

This monograph examines why it is important to involve people using services in improving safety and how this might best be done. The term “patient engagement” is used throughout this document and refers to the process of building the capacity of patients, families, carers, as well as health care providers, to facilitate and support the active involvement of patients in their own care, in order to enhance safety, quality and people-centredness of health care service delivery.

There are many definitions of patient engagement, but all share an underlying theme: the facilitation and strengthening of the role of those using services as co-producers of health, and health care policy and practice (1).

## 1.2 Approach

To compile information for this monograph, the team searched for systematic reviews in PubMed, the Cochrane Library and specific websites and databases. Feedback from experts was obtained and further references were identified through the peer review process. Information was drawn from 39 reviews about patient engagement in safety, although most were not specific to primary care settings. The original studies included in each of these reviews were read to ensure a focus on primary care. For brevity, not all citations are listed.

International experts in delivering safe primary care provided feedback, shared examples of strategies that have worked well around the world, and gave practical suggestions about potential priorities for the World Health Organization (WHO) Member States to improve the safety of primary care services.





## 2 Patient engagement

Patient engagement is increasingly recognized as an integral part of health care and a critical component of safe people-centred services. Engaged patients are better able to make informed decisions about their care options. In addition, resources may be better used if they are aligned with patients' priorities and this is critical for the sustainability of health systems worldwide.

People using health services are increasingly asking for more responsive, open and transparent health care systems. They expect practitioners to engage them in the decision-making process, although individual patients may vary substantially in their preferences for such involvement.

Health practitioners have multiple competing priorities, which may sometimes appear to conflict with patient safety. These may include organizational, reputational, financial priorities and self-esteem, amongst others. However, patients have their safety and well-being as primary drivers and thus, they can raise this as a priority in the health care they receive.

Patient engagement may also promote mutual accountability and understanding between the patients and health care providers. In most countries, primary care is often the first point of contact of patients with the health care system. Therefore, primary care offers a good starting point for further engaging patients throughout the system.

Primary care providers are ideally placed to engage patients in a dialogue about their health conditions, circumstances, health needs and personal values and preferences. Informed patients are more likely to feel confident to report both positive and negative experiences and have increased concordance with mutually agreed care management plans. This not only improves health outcomes, but also advances learning and improvement, while reducing adverse events.

## 3 Key issues

### 3.1 Areas for patient engagement

Engaging patients and families is equally important in all countries across the world, although the relative priority placed on this concept and the manner in which it is done still differs widely at present. There are many areas of health care training and implementation where patient engagement can be implemented.

Collecting information about the patient experience and outcomes of care may be the starting point for engaging patients. Such information can be collected through surveys, informal online feedback, interviews or focus group discussions. Feedback about the patient experience provides insight into patient needs, preferences and values, which can help to improve the quality and safety of care.

Patient engagement is a promising avenue in the area of health care education. Having real patients articulate their experiences and viewpoints helps those taking part in training to appreciate the patient perspective and the importance of preserving trust between clinicians and patients. These core values are essential to care that is compassionate, quality assured and, above all, safe. Exposure to patient stories during training is valuable and helps to motivate practitioners to improve safety.

At an organizational level, patients and families can be engaged in the design or development of patient-centred processes and system, for example as members of advisory committees (2).

Patient and family engagement in policy development has also gained increasing recognition. For example, patients can be engaged in the development and dissemination of tools, information and educational materials (3). They can be involved in research as a source of data and as co-researchers contributing to research design or the planning and execution of research (4).

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