

Patient Recruitment & Enrollment:

A Guide from the Medication Optimization Technology Toolkit

Description

Goals for recruiting and enrolling patients into new technology-enhanced interventions are more often met when staff is engaged, the patient's primary care physician is involved, and a care manager has a pre-existing care management relationship with the patient. These factors support better communication and facilitate an increased likelihood of buy-in across all stakeholders. Other critical success factors include use of structured communications protocols and staff outreach resources, and patient education materials that support opportunities to discuss program features that optimize medication use and communicate the benefits in meeting patients' care goals.

Target Audiences

For program planners and staff involved in patient recruitment and enrollment.

Helpful Tips

Patient recruitment plans should include how targeted patients will be identified and enrolled, including details of data sources and methods.

1 Set Goals for Recruitment

What are the initial enrollment goals and outreach and recruitment methods for raising awareness among patients and physicians and guaranteeing enrollment in the medication optimization program?

2 Plan Enrollment Strategy

Who is responsible for leading the outreach effort and engaging staff, other providers, and patients, and what methods will they employ to be effective in

communicating with and supporting their needs?

3 Initiate Patient Enrollment

What resources will be made available to support staff with enrollment efforts and to train patients on the installation and operation of equipment, educate patients on medication management roles and responsibilities, and update users on user benefits and developments in technology-enabled medication management practices?

1 Set Goals for Recruitment

Establish program goals related to the desired number of patients to be enrolled according to the patient inclusion and exclusion criteria, identify strategies for supporting staff in outreach and encouraging targeted patients to participate, and outline procedures for staff to follow in the enrollment and clinical management of patients.

Why is it important – The patient recruitment and enrollment process is most effective when it aligns with standard clinical practices, engages clinicians in referring patients to the program, and uses incentives to align care manager tasks to meet targeted enrollment goals.

2 Plan Enrollment Strategy

Appoint a champion to reinforce goals and be responsible for leading the outreach effort and engaging staff, other providers, and patients, and develop the resources and outreach methods that will be needed to enable them to be effective in generating enthusiasm and interest in the program and meeting targeted levels of enrollment.

Why is it important – The motivation of staff and development of materials that promote programs to optimize medication use involving patient-centered technologies can take advantage of opportunities that staff often have as a result of an established relationship with the patient to create awareness and discuss the features and benefits of the program.

3 Initiate Patient Enrollment

Patients that enroll in the program need to be offered support on installation and use of the medication management technology, as well as guidance on patient responsibilities. This can be accomplished face to face during a clinic visit, in the patient's home, in a group setting, or by telephone. Once enrolled, ongoing feedback to staff and interaction with patients are critical to keeping all stakeholders engaged.

Why is it important – Keeping patients and physicians engaged is key to their ongoing involvement in the program and its continued success.