

Positioning your organization's digital front door strategy for success

Deliver streamlined patient access to improve the patient experience

Consumers are changing the way they approach health care

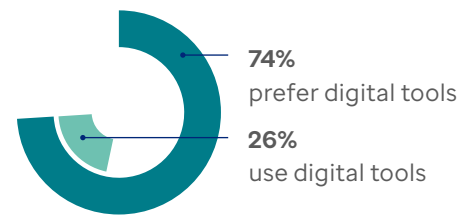
In a shifting health care landscape, patients are demanding more convenient and accessible experiences. A digital patient engagement strategy can provide easier access, reduce cancellations and enhance front-end collections. This helps streamline operations and improve patient satisfaction.

Providers must deliver consistent, personal and convenient experiences – from provider search and patient scheduling through payment. In fact, consumers increasingly prefer digital tools across all activities related to health care. It is critical to engage patients with modern technology including an enabling, omnichannel approach, to reduce no-show rates and help patients get the care they need.

Unfortunately, many patients are not confident that the health care industry has the technology they need to manage their care. Taking a digital approach and combining it with strategic service innovations can help organizations improve patient perceptions – and realize financial, clinical and strategic benefits. These innovations include a professionally staffed patient engagement center, self-service tools and analytics.

Improving the patient experience and your bottom line

A patient engagement center helps transition health care organizations from reactive to proactive by ensuring patients can get the right care at the right time, in the right care setting. For many provider groups, a strong, multi-modal patient engagement center improves experiences through advanced schedule management and a patient-friendly payment process. A high-performing engagement center can lower operational costs by applying self-service tools, redistributing patient interactions from costly phone encounters to more



More than two-thirds of patients prefer digital follow-up

In health care, digital use is far lower than demand. Three-quarters of health care consumers say they prefer digital tools, yet just one quarter report currently using them.¹

efficient digital touch points. It can also be foundational to thriving under value-based care. Effective patient outreach campaigns can enhance wellness visit performance, chronic care management and care plan adherence.

Value drivers for patient engagement centers

Practice efficiency

- Patient retention and attribution
- Specialty-specific communication and protocol scripting
- Reduced no-shows and improved provider productivity

Patient and physician satisfaction

- Ease of access leveraging self-service tools and multi-modal communications
- Financial transparency
- Reduced physician on-call burden

Financial performance

- Appointment-slot optimization
- Improved collections and reduced denials
- Improved patient revenue through proactive outreach

Three ways medical groups can build success into a patient engagement center

A 3-phase approach can help your engagement center remain competitive, elevate the patient experience and improve your bottom line. These phases include centralizing patient intake and outreach, elevating practice productivity through technology, and leveraging analytics to deliver timely care.

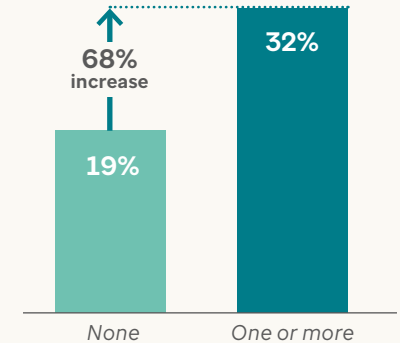
1 Create a centralized and consistent access point

McKinsey's Consumer Health Insights Survey asked 3,000 health care consumers which criteria mattered most when choosing a primary care provider (PCP). From 20 options, respondents chose "appointment availability" and "appointment times that meet your needs" as the top 2 factors. Increasingly, we see engagement center optimization including streamlined access points, and centralized, specialty-specific pod structures handling scheduling inquiries and outbound calls. Appointment scheduling is often the first impression a patient has of your practice, so a centralized strategy is critical. Well-executed, centralized scheduling improves patient access and satisfaction on multiple fronts while boosting practice productivity and efficiency. For a winning approach:

- Establish group-wide goals and institute scheduling reforms across specialties
- Reduce friction through scripting technology investments, scheduling protocol changes and staff realignment
- Engage your physicians early to mitigate natural resistance to change, and address any concerns on maintaining control over individual schedules and front-office relationships
- Utilize scheduling templates and standardization, including best-practice appointment times and measures to prevent double-booking
- Establish performance benchmarks specific to appointment fill rates and physician utilization

Patient attrition escalates with no-show patients

Patient attrition increases 68% based on one no-show appointment.²



Research based on 3.5 million patient visits by 1.2 million patients

Adhere to appointment standards

Schedule management is important for physician satisfaction. To be successful, organizations should establish protocols that office-based staff can follow when scheduling follow-up appointments.

Provider engagement teams should routinely share data with practices on no-show rates, booked and available capacity, blocked schedule statistics, referral patterns and more. Protocols should be introduced during implementation and new provider orientation, as well as reviewed with practice management periodically.

2 Apply technology and digital engagement

Successful patient engagement is more than convenient access to in-person appointments or addressing inquiries by phone. Today, engagement also requires connecting with patients using the latest technologies where and when patients want to be reached. While improving the consumer experience is a stated priority for many medical groups, few offer real-time self-service scheduling, accurate price estimation and 2-way communications with patients as an extension of their call center engagement services.

What does a successful digital patient engagement approach look like?

- Uses mobile-first access for routine tasks wherever possible
- Offers 2-way text communication to secure appointments, reschedule and make payments
- Provides access to accurate cost-of-care estimates based on individual health plan coverage, deductibles and copays
- Sends patient-preferred multi-modal reminders for appointments, payments, real-time office visit wait times and missed wellness checks

Improve revenue cycle performance and patient safety

Technology modernization improves patient engagement and loyalty while improving practice revenue cycle performance. Front-end automation verifies insurance eligibility and streamlines authorizations. Ultimately, preventing front-end denial issues ensures patients receive accurate and timely bills.

Utilizing technology can also positively impact patient safety. Automating physician protocol scripting is a critical success factor in developing a patient engagement center. Automating triage questions and scheduling the appropriate care can help with adherence to patient safety guidelines.

3 Apply data-driven outreach to improve appointment capture and care quality

Frequently, patients who need regular care can go long periods of time between visits, adversely affecting their health and potentially driving up care costs. On top of that, cancellations and rescheduling increase staff time for your practice. Provider organizations are finding that proactive outreach campaigns to patients increase medical adherence and timeliness of care. A well-designed and managed analysis of patients who have missed preventive screenings and suffer from chronic care conditions can be the backbone for outbound campaigns to ensure that patients receive appropriate care. These patient encounters also position clinics to provide additional care coordination, screening and preventive services.

90% of patients, including baby boomers, want access to self-scheduling tools. Yet only 53% of providers offer them – and many of those tools aren't integrated into provider workflows.³

Fewer than one-fifth of all eligible Medicare patients receive a wellness visit.⁴

Lessons learned from successful patient engagement center endeavors

Provider organizations looking to achieve full value from a customized engagement center should design an approach that accounts for the following principles:

Analytics and outreach improve patient access and quality



300

Number of primary care physicians



25%

Improvements in annual wellness visit and chronic care



6,911

Additional annual wellness visits and chronic care

Sample practice of 300 primary care physicians improving their annual wellness visit and chronic care appointments by 25%.⁵

Realize it's more than “just a call center.” A limited vision can lead to operating silos, reduced provider engagement and infrastructure gaps. The combination of contact center centralization, revenue cycle optimization and population health alignment is key for high-performance outcomes.

Take on an omnichannel strategy. A high-performing model includes advanced self-service tools, interactive voice response (IVR) tools, population health analytics, financial clearance applications, messaging tools and forms of intelligent automation.

Don't assume a “one-stop shop” means patients will only speak with one person. A truly integrated engagement center encompasses a multidisciplinary team that includes specialized team members to help with different needs.

Involve physicians and department leadership in key decisions. Engage your clinical personnel early and often for their feedback and insights on process improvements so as to not undermine the effectiveness of the engagement center strategy.

Rely on data. Real-time performance tracking will allow leaders to quickly respond to changes in demand and call volume, triggering the use of rollover resources and strategic call distribution to skill-based resource pools.

What is the best patient engagement center approach for your organization?

Consumer expectations in health care include higher levels of personalization and engagement. Providers have an opportunity to support consumers, and in doing so, ensure they continue to receive high-quality care. Meeting those expectations and maintaining patient satisfaction can lead to improved health care outcomes and greater patient retention.

Many providers are taking a do-it-yourself approach to patient engagement. However, lack of scale, necessary technology and workforce management strategies can result in higher operating costs and compressed ROI. Specialization and expertise can maximize patient access, facilitate financial conversations, triage calls to the appropriate levels of care, document interactions and track engagement metrics.

Partnering to enhance the patient experience and improve your bottom line

Reimagining the patient experience can seem overwhelming – but enlisting a strategic partner can help you identify best opportunities and prioritize. Optum will partner with you to design a tailored solution that meets your needs including consumer-centric digital solutions, best-in-class technology and skilled staffing, to quickly maximize the value of your investment. Our solutions, proven practices and technology turn every interaction into an opportunity to increase revenue, cut costs, grow patient satisfaction and improve medical group performance.

Reimagining the patient experience may seem challenging, but you don't have to do it alone.

Contact us today to learn how we can help you achieve the next level of patient engagement.

optum.com/contactus

Sources

1. McKinsey Consumer Health Insights Survey. [How COVID-19 has changed the way US consumers think about healthcare](#). June 2021. Accessed April 2022.
2. Hayhurst C. [No-show effect: Even one missed appointment risks retention](#). Athenahealth.
3. PatientEngagementHIT. [Optimizing the patient experience with online appointment scheduling](#). March 2022. Accessed April 2022.
4. Misra A, Lloyd JT. Hospital utilization and expenditures among a nationally representative sample of Medicare fee-for-service beneficiaries 2 years after receipt of an annual wellness visit. *Prev Med*. 2019;129:105850. doi:10.1016/j.jypmed.2019.105850.
5. Optum estimates based on existing medical group client base.



optum.com

Optum is a registered trademark of Optum, Inc. in the U.S. and other jurisdictions. All other brand or product names are the property of their respective owners. Because we are continuously improving our products and services, Optum reserves the right to change specifications without prior notice. Optum is an equal opportunity employer.

© 2023 Optum, Inc. All rights reserved. WF8134699 03/23