



WHITE PAPER

Digital transformation of the patient access experience:

A practical guide

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INTRODUCTION

Traditional healthcare practices will soon be, if they are not already, competing with Amazon. The online retail giant announced nationwide availability of its Amazon Care virtual health services recently, stating that “patients are tired of a health care system that doesn’t put them first”.

The challenge is clear: Healthcare must focus on solutions that support a more patient-centric approach to care, a sentiment reinforced by a recent HIMSS white paper, which stated that “reaching patients requires a thoughtful engagement approach that is highly personalized and minimizes the burden on staff members”.

72%

of patients want more personalized care.

(Source: [Abbott](#))

As Amazon and other technology leaders continue to transform the landscape into a consumer-centric marketplace, patients are demanding a care experience that is simple, convenient, efficient, and personalized. These newly empowered patients want to know that their providers know their name, understand their needs, and are responsive when they reach out for help.

This new focus on personalized care is shining a new light on the patient access experience at the “digital front door,” where providers and staff engage with patients to help them schedule and change appointments, provide answers to questions about their care, manage payments, and more.

The way in which these critical communication touchpoints are managed sends an important message

to patients about how their doctor-patient relationship is valued. When patient communications are efficient and personalized, everyone benefits. Patients are more engaged and likely to comply with treatment plans. And a modernized patient access platform benefits the practice, too, by optimizing work processes and driving incremental revenue.

Cloud-based patient communications systems—integrated with the electronic medical record (EMR) or other patient data systems—can provide practice staff with convenient access to a single view of a patient’s health and history whenever and wherever it is needed, making personalized communication with patients possible. They can also enable important connections to the range of communication channels that patient prefer.

58%

of patients want messages from doctors to be personalized to fit their needs.

(Source: [TeleVox Healthy World](#).)



Where are we now?

So, how close are today's healthcare practices to implementing a highly personalized patient access experience? In many cases, patients continue to experience frustrations with long wait times, complicated processes, and impersonal communications when they contact the physician office. All too often, the burden is on patients to serve as their own advocates and provide their details and histories.

This fragmented patient access experience can be traced to lagging adoption of digital technology. And, even while healthcare organizations have implemented EMR messaging, online scheduling, patient reminder software, and other technologies to improve service to patients, interoperability remains a challenge.

While the EMR, for example, collects and stores patient data for use at patient portals, it cannot effectively be used to support a personalized patient access experience. Today, the reality is that most healthcare practices are working with a complex web of disconnected systems, each of which is designed to support an individual touchpoint in the patient journey.

When accommodating the need to communicate with patients via multiple channels, the situation becomes even more confusing. Compared with the past, when phone calls and voice messaging were the only ways that healthcare teams communicated with patients, today there are more channels than ever for communicating with patients.

Communication issues and patient feedback.

For these reasons, the patient access experience often does not measure up to patient expectations. Without implementation of a cloud-based system that can accommodate multiple communication pathways and channels, practices will continue to experience issues that include:

- > Inconsistency in messaging pathways that create confusion.
- > Broken workflows result in no-shows or late cancellations.
- > Siloed patient portals create fragmented communications.
- > Lack of staff training cause patient frustration.
- > Lack of monitoring can lead to miscommunication and medical errors.

In today's consumer-centric environment, issues like these do not go unnoticed by patients. In fact, patients are publishing their feedback and evaluations for everything from the appointment scheduling process to parking availability—reviews that can significantly impact reputation and revenue for a healthcare practice or provider.

Where do we want to be? How do we get there?

Clearly, the goal for any practice today is to provide a patient access experience that seamlessly merges digital and direct communications in a hyper-personalized manner and a way that earns and retains their patients' trust.

Ensuring an ideal patient access experience requires a new focus on the all-important patient contact center. By recognizing the important role it plays in coordinating patient care, today's healthcare practices can begin taking steps to transition from legacy on-premise platforms to powerful, flexible cloud-based solutions that provide the ability to proactively serve the needs of patients.

Achieving a truly personalized patient access experience is all about moving from reactive care to proactive care. That requires that your contact center staff always have access to complete information about every patient at every point of contact, so that they are able to anticipate their patients' needs and integrate technologies and contact across multiple channels.

The journey to the ideal patient access experience encompasses a thoughtful process in which each step builds on the one before.

75%

of patients look at online reviews when searching for a new doctor.

(Source: [SoftwareAdvice.com](https://www.softwareadvice.com))



A single negative review can result in the loss of as many as 30 patients

(Source: PatientPop Survey, 2021)

36%

of patients left a provider in the last year, citing poor experience, lack of access, and communication.

(Source: [Quaintise.com](https://www.quaintise.com))

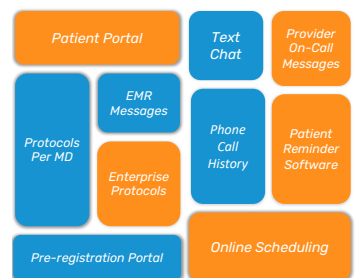
28%

of patients switched providers in 2020 because of a poor digital health care experience

(Source: [Forrester](https://www.forrester.com))

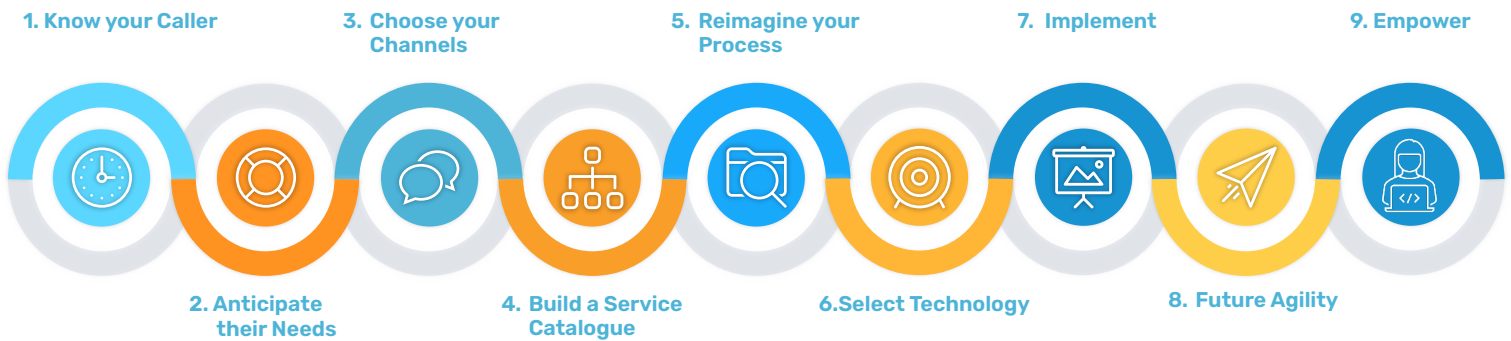
"Frankenstein"

is the result of the lack of integration



"The lack of integration stems from adding systems incrementally as they became available over the past 10 years. You probably would have done it differently if you implemented them all at once."

- Jeff Mock, CEO of PatientSync



Step 1. Know your caller.

The practice phone staff must always understand precisely what they are empowered to do on each call and have access to complete information about every caller—including basic name and contact information, the patient’s preferred form of address, interaction history, referring physician, and insurance provider.

Providing staff with these capabilities requires an advanced phone system integrated with the practice’s information systems, with capabilities that include:

- > Call recording – for quality assurance of phone interactions with patients
- > Advanced call routing – to enable a strategy for assigning incoming calls to the most suitable agent
- > Remote operation – so that virtual call centers across multiple practice sites and outsourced contact center partners can work seamlessly with the same phone system.

Armed with complete patient data, a skilled operator will always be able to automatically route calls to the appropriate associate, eliminating the need for the patient to provide the information.

Step 2. Anticipate the patient’s needs.









In each case, the individual taking the call should be able to call up on the phone screen a summary of all vital and relevant data about that patient. Agent scripting and support tools are available that provide everything the agent needs to know in the context of the call at the right time, which can eliminate the need to memorize and retain printed scripts.

Thanks to the exploding adoption of artificial intelligence (AI), this capability promises to evolve with even more sophistication in the coming years, so that even more staff will be empowered to handle calls professionally and effectively. It also makes it possible for outside resources to support the contact center.

Step 3. Identify patient communication channels.

In today's multichannel world, it's important to communicate with patients in the way that they prefer. According to HIMSS, the ideal patient communications platform enables multichannel outreach (including SMS) and two-way communication. Yet, with the many ways there are to communicate with patients, it is important to determine the channels that the practice group would be able to manage effectively.

Start with a requirement grid like the example below that includes a range of channels and factors that might affect assignment of staff for a multichannel contact center. A chart like this can serve as a foundation for structuring the processes for each channel, determining the staffing and response times that will be needed to create a satisfying, effective and personalized experience at each channel.










	 Patient Portal	 Email	 Texts	 Web Chat	 Phone	 Scheduling	 Reviews	 DM Social Media
WHO: Clinic Hours	MAs, RNs	MAs, RNs	Front Desk 1	Front Desk 1	Front Desk 2	Front Desk 2	Reputation Mngt Firm	Front Desk 1
WHO: After Hours	N/A	Call Center or Answering Service	Call Center or Answering Service	Call Center or Answering Service	Call Center or Answering Service	Call Center or Answering Service	N/A	Call Center or Answering Service
ACTIONS	<ul style="list-style-type: none"> • Medical Advice • Escalate Issues • Refill Rx 	<ul style="list-style-type: none"> • Scheduling tasks • Follow up • Confirmations • Refill Rx Requests • Record Requests 	<ul style="list-style-type: none"> • Scheduling tasks • Reminders • Take a message 	<ul style="list-style-type: none"> • Scheduling tasks • Reminders • Take a message 	<ul style="list-style-type: none"> • Scheduling tasks • Reminders • Connect to provider • Records requests • Take a message 	<ul style="list-style-type: none"> • Scheduling requests • Confirmation/Rescheduling 	Post responses to reviews and comments	Engage and redirect to other comms channels
SERVICE LEVEL	Slow	Slow	Fast	Fast	Fast	Slow	Slow	Varies

Step 4. Build a service catalog.

To ensure that staff are prepared with all the information they will need to be effective in their communications, build a database of every potential individual that might contact your practice. Working with your front desk, list every potential caller, including:

- > Referring physicians
- > Hospitals
- > Attorneys
- > Patients
- > Patient family members caregivers
- > Nursing homes
- > Insurance companies

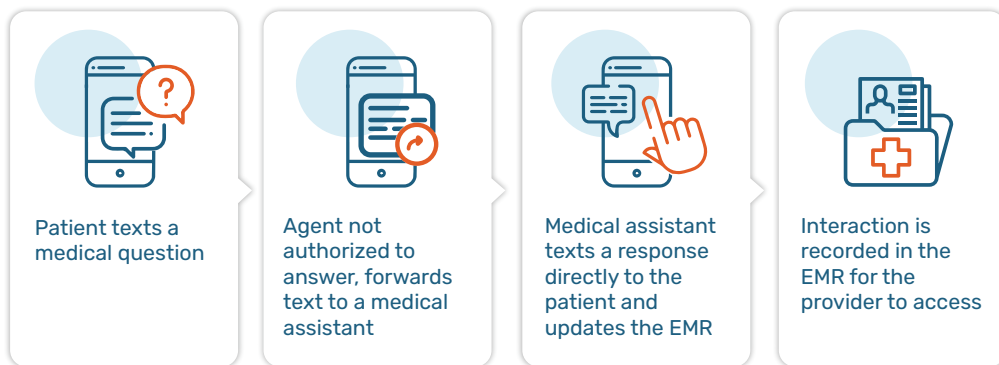
Next, map out the actions that each agent is empowered to take for each caller. The example below lists eight channels, indicates who should handle the interaction, actions they should take, and the service level for each. For every interaction, the patient access solution technology should provide agents with everything they need to know about patients and determine how best to meet their needs.

	 Emergency Room	 Referring Doctors	 Your own Providers	 Hospitals	 Patients	 Employer/ Team Partnerships	 Caregivers/ Family	 Insurance Groups	 Attorneys
SPEED	Instant	Fast	Instant	Fast	Fast	Fast	Medium	Slow	Slow
GOAL	Connect the caller to the right person or information	Ensure protocols and agreements are upheld	Connect them to the right person or information	Connect to the right person or information	Serve the needs of the patient or connect to someone who can	Ensure protocols and agreements are upheld	Serve the needs of the patient while upholding privacy and compliance rules	Timely response following compliance and billing guidelines	Timely response upholding privacy and compliance rules
EXPERIENCE	Efficient – least red tape, greatest speed	VIP; Personalized, greeted by name; 1 call resolution	VIP; personalized, greeted by name	1:1, efficient; critical thinking; 1 call resolution	1:1, live; empathetic; personalized; 1 call resolution	VIP; personalized greeting; prioritized service	Empathetic, accurate, 1 call resolution	Automated; online or voicemail	Automated; online or voicemail

Step 5. Reimagine your process and your teams.

Ensuring a completely personalized patient access experience requires more than an investment in new technology. It demands a new look at your current scheduling process, staff, and workflows.

This is an ideal point at which to consider collaborating with a consultant to help you take a deep dive into your scheduling process. They can help you identify inefficiencies and areas for improvement, streamline processes, and reduce touchpoints. They can help you develop a map of the individuals who contact your practice, the actions that can be taken, and a process grid that includes the stakeholders involved and their geographic location. The flowchart below outlines an efficient process that provides the ability to requeue a text message to the appropriate contact and eliminates callbacks and response delays.



Step 6. Choose your technology solution.

While EMR systems are an essential component of practice operations, they are not designed to provide the customer relationship management (CRM) functionality that can ensure a personalized patient access experience.

When choosing a solution that meets the precise needs of your patients and your practice, the new process and workflows developed in step 5 should inform the selection. Use a selection grid like the one below with criteria that enable you to evaluate and rank each product based on its ability to fulfill your business requirements.

CONTACT CENTER TECHNOLOGY CRITERIA:

WHY IT'S IMPORTANT

- | | |
|---|---|
| <input type="checkbox"/> A cloud-based platform that requires little or no involvement from your IT team | > Your IT team does not have the bandwidth for a complex system implementation |
| <input type="checkbox"/> Software specially designed for healthcare | > Busy healthcare staff need the speed and convenience of a plug-and-play platform |
| <input type="checkbox"/> A partner that can help you identify areas of standardization with fewer nuances | > 90% of your scheduling rules and protocols will apply across all your providers—only about 10% will be unique |
| <input type="checkbox"/> A platform that meets your patients where they are and enables text, emails, calls or web chats for scheduling outside your patient portal | > Your patient portal is most often used for post-visit communication and patient follow-up |
| <input type="checkbox"/> A platform that enables every change to be global and instantaneous | > Your staff should always be able to access patient data that is accurate and consistent |
| <input type="checkbox"/> CA system that is available to your patients 24/7/365 and interfaces with your EMR | > You need to be able to your meet patient scheduling needs in real time |

Step 7. Implement your solution.

The effectiveness of your new patient access solution will depend on how well you educate and communicate with patients and staff about the new platform. To help ensure your success, you may want to taking any or all of the following steps:

- > Add a new section at your website with details about how to contact your practice and what to expect
- > Develop a handout for new patients that includes information about what to expect when they contact the practice
- > Update patient privacy forms to include opt-ins for receiving texts
- > Change patient HIPAA forms to include information about texting your practice
- > Educate your team about their roles in the new patient access experience
- > Create measurement points for service levels / patient satisfaction

Over time, it will be important for you to measure outcomes against the service levels for each communication channel and patient satisfaction.

Step 8. Future-proof your solution.

Just as the expectations of the customers of consumer-facing companies have continued to evolve, so will the patients and staff who use your patient access solution. With the right platform, you will be able to leverage its capabilities for a wide range of initiatives and provide new, more interactive experiences for your patients.

Over time, by integrating key patient interactions into your patient communications platform—such as health maintenance reminders, revenue capture, patient test order queue, and more—you can quickly transform your contact center into a revenue center.

Step 9. Empower your patient scheduling staff.

Most patient scheduling processes in use today require staff to memorize data and react to every potential patient scenario. A technology solution that provides all users—including new staff—with the tools and knowledge they need can ensure the same level of service and a highly personalized experience. Here's how that might look: for each communication channel and patient satisfaction.

Incoming calls. For incoming calls from patients and physicians alike, the agent's screen will populate with the information needed to create a satisfying personalized experience.

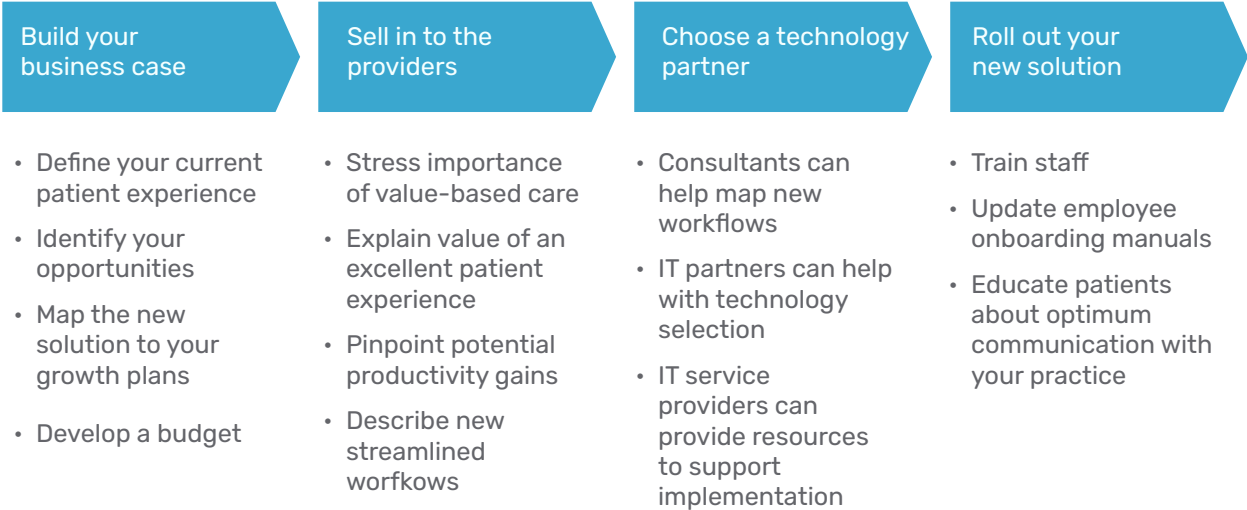
When a patient calls, the agent will view the patient's full contact history and any pending clinical messages, so he is able to anticipate the reason for the call. When a referring physician or other healthcare provider calls, the agent will view the caller's profile, which will trigger a workflow that ensures the efficient application of relevant protocols and script a greeting.

Outgoing communications. When reaching out to patients or providers, the agent will be prompted with a script that is formatted for the platform in use, whether phone or text, and the outcome of the contact is recorded into the individual patient's record in the EMR.



How to Win The Patient Access Experience

Implementing a new patient access experience into a comprehensive, truly personalized, and effective workflow that redefines the role of your patient contact center will require a significant investment and a painstaking process that includes securing buy-in from every stakeholder at your practice—from board members and providers to staff.



This is a sensitive and complex undertaking, one that requires a high level of expertise. For that reason, it may be advisable to seek the support of a consultant with special expertise in healthcare technology.

CONCLUSION

The patient contact center now has an even more critical role to play for today's healthcare practice. The good news is that solutions are now available that ensure the instant availability of real-time, HIPAA-compliant data about patients that can be used to drive best actions for ensuring a positive patient access experience.

PatientSync provides a cloud-based unified communication platform and call-center software that enables a concierge-style, 1:1 caller experience. Since 2014, PatientSync has strived to make it easier for medical call center associates to serve callers. Using PatientSync's proprietary guided workflow software makes it possible for every call center agent to perform as well as your best call center agent, while offering patients unified omnichannel communications options for engaging with your organization.



**To learn more or to request a demo
visit us at patientsync.us**