Using Patient Management Technology

Here's how to give each patient a positive experience.

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The Goal of Care Management Software

The patient-service cycle consists of three parts: pre-arrival; point of care; and post-visit, after the patient has left the doctor. The patient's clinical journey should be a seamless, convenient experience, from initial contact to post-visit feedback. The goal is to engage patients as early as possible, enabling them to complete the necessary administrative tasks before their appointment. This also significantly reduces the necessary administrative burden for the staff. Automated care management solutions deliver a positive patient journey and significantly increase patient satisfaction. These positive experiences also improve your online reputation, enhance patient outcomes, improve clinic productivity, and increase revenue.

Manual medical data input and transcription is time-consuming and contributes significantly to burnout. It requires considerable staff time, is expensive, and robs you of productivity. Today, you can automate the patient experience and, at the same time, eliminate manual data input. Not only can we ask the patient to do this before their appointment by using today's technology, but it also allows for self-scheduling appointments and obtaining prior authorization.

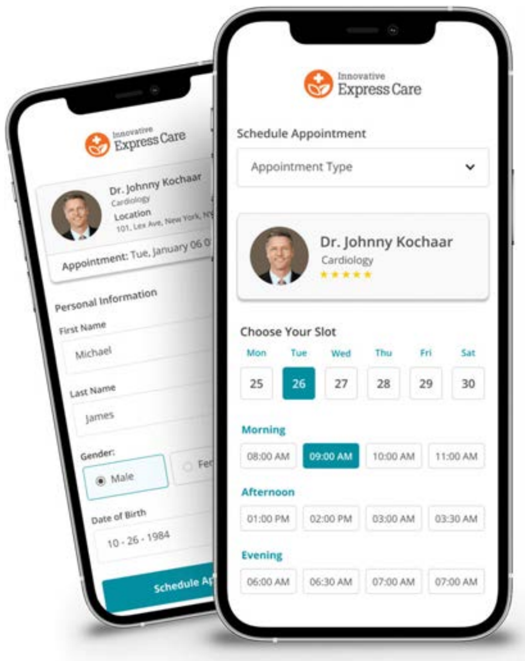

Figure 1: Use of mobile phone to schedule an appointment.

Dynamic Patient Self-Scheduling

Patient self-scheduling has to meet the needs of both the patients and the providers to deliver the best "moment of truth" for everyone involved. Just as it is possible to schedule a flight online, effective patient intake technology allows patients to schedule appointments online without communicating with a receptionist or patient scheduler. However, opening a provider's calendar for the public to self-schedule is problematic. The scheduling process becomes more nuanced if you have multiple providers in your organization. Self-scheduling automation should allow for a series of vetting questions and logic using custom developed logic trees that will guide the patient to the right provider and the appropriate time slot for demographics and appointment types and more (Figure 1).

Depending on the patient's answers, it is even possible to prevent the patient from self-scheduling, guiding the patient to contact the office to schedule that particular appointment type.

Before a new patient schedules an appointment, a typical scenario often begins with them looking at the physician's online reputation and reviews. The patient then reaches out to make an appointment, and the receptionist requests contact and insurance information. When a patient contacts the office via a phone call, they often are placed on hold, and then sent through a phone tree to make an appointment. This process may take as long as 20 to 30 minutes, resulting in a frustrated patient and an overburdened receptionist. With patient intake technology, this process can be streamlined, echoing the Amazon experience.

Patient Intake Software and the Moment of Truth

The initial phone contact with your practice is a moment of truth. This is the opportunity to start the streamlined patient process and cre-

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ate a positive first impression. You get one chance to make a first impression. How does your receptionist or appointment administrator handle this moment of truth? Are they

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abrupt or impolite? Do they put the patient on hold for several minutes? Any discourtesy will create a negative impression of your practice and lead to an injured online reputation. If the patient's perception is negative, that moment of truth may make the patient hesitant about visiting your office. Or it might create an anxious patient who may seek healthcare elsewhere. Did you know that 96% of patient complaints and bad reviews have nothing to do with care received from providers but are directed at the administrative customer service experience?[1]

Imagine the opposite scenario: the patient easily self-schedules, or the receptionist answers the phone, uses the caller's name, and is pleasant and amiable. This creates a positive impression. Most likely, the patient will approach the office visit positively, and the patient's anxiety level will be reduced.

You can streamline the patient experience in your practice by using customized intake forms unique for each physician, each appointment type, and more. The patient registration software also includes pre-arrival–focused patient intake forms that inform the patient of responsibility for any fees not covered by the insurance company. These patient registration forms record demographic information, insurance information, consent-to-treat forms, privacy notices, disclosures, customized health questionnaires, clinical data, history of present illness, review of systems, and more.

In short, if you collect it at the point of care, you should be able to collect it pre-arrival. This information can be integrated with your EMR system in real time. These patient intake platforms allow patients to sign the forms electronically before their first appointment. The care management technology will alert the patient that these forms and consents must be updated annually. You should be able to automate your nuanced and complex intake scenarios, making it easy for the patient to provide the correct

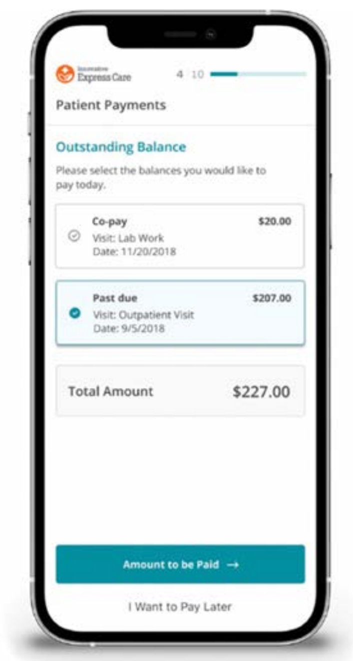

Figure 2: Screenshot that shows the patient's remaining balance.

information you require to deliver the best possible care.

Patient Bill Paying

Moments of truth are not restricted to making appointments and telephone calls. For instance, you must examine how staff members settle patient bills (Figure 2). Do you need to reduce the time it takes to complete patient information forms? The *Welcome to the Practice* package should instruct patients to contact the office during office hours for drug refills and not to request a refill after hours or on the weekend.

Patients will have a positive experience even before they come to your practice if your staff members send a "Welcome to the Practice" package before their first visit. This package might even be sent to the patient electronically. The following information should be included with the practice brochure:

- A link to your website;
- Any special instructions about parking or access to the care center;
- A newsletter;
- A map;
- Parking locations near the office; and
- Patient education material about the patient's specific medical problem or complaint.

Reducing Waiting Room Times

Another moment of truth is the bottleneck that can develop when patients are requested to complete forms and questionnaires in the waiting room (we prefer the term "reception area"). You can avoid these choke points in the office and the reception area by having patients complete everything administrative remotely before they arrive. Most patients prefer to use their cell phones on well-designed user interfaces that make it easy for them to complete them accurately. This is one of the best aspects of the automated care management technology performing this process. Using virtual reception area solutions means patients can enter the practice at the time of their appointment and be seen in a timely fashion. This process ensures that the patient has a streamlined experience with minimal waiting time, having already completed all the administrative forms and tasks before they arrived.

Obtaining prior authorizations (PA) for patients to be seen by the physician also can create delays. Most of us have had the experience of patients waiting an excessive amount of time while someone in the office contacts an insurance company or primary care physician to obtain authorization. Obtaining prior

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authorization may take an employee 20 to 30 minutes that would be better spent taking care of patients. This PA process can be accomplished with a care management software program embedded in your EMR that obtains the PA without your staff waiting for long periods on the phone to communicate with the insurance companies.

Practices that do not provide easy access, keep patients waiting, treat authorizations as a "burden," and have unfriendly staffs risk being dropped from the insurance carrier plan. This can mean the loss of hundreds and sometimes thousands of patients who will not be able to use your services.

Most healthcare practices leave patients in the reception area to complete the forms and questionnaires. This is time-consuming and starts the patient on the trajectory of a negative healthcare experience. An effective automated care management technology program significantly reduces the waiting time in the reception area, improving the patient and staff experience.

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More Time to Focus on Patients

Because patients no longer need to spend as much time in the reception area, the physicians have more time with the patient. Numerous studies have demonstrated that the more time the doctor spends with the patient, the better the outcome and the less likelihood of having a litigious patient.[2]

Another advantage of completing the forms before coming to the office is that the patient does not have to use a clipboard, a tablet, or a kiosk to enter data into the forms. This is particularly important in this era of COVID-19, when patients are reluctant to handle computers, pens, and clipboards used by other patients for fear of contracting the virus.

Technology can remove financial friction between patients and the practice. A robust and effective technology avoids the front desk ambush—that is, asking for money or making a credit card transaction, which may be a negative experience for the patient that should be avoided. Patients expect to pay for their care or provide their insurance information so that payment can be made to the practice promptly. However, asking for money for co-pays and deductibles is a pain point for patients that can be avoided by using healthcare technology to collect these

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fees before the patient arrives in the office.

The goal is to prepare the patient before the visit to make the patient experience positive and seamless. An effective automated program significantly reduces the need for administrative data transfer or the requirement for the clinical staff to handle patient data. One of the most popular patient intake and management systems, Yosi Health (www.yossihealth.com), has demonstrated savings of 14 to 17 minutes per patient during check-in. Less time spent on documentation by the physician, the medical assistant, or the scribe in the exam room translates to more eyeball-to-eyeball time with the patient.

The Peak–End Rule

The peak–end rule states an event is remembered by what occurs at the peak or the end of the encounter. Kahneman and colleagues [3] have shown that how we remember our past experiences is determined almost entirely by two things: (1) the average of how the experience felt at its peak (best/positive or worst/negative); and (2) how the experience felt when it ended.

This provides a summary to remind ourselves of how an experience felt, affecting our decisions about having that experience again. For example, the memory of an 18th birthday that was filled with laughter but ended with a fistfight will likely skew to the worst part of the experience.

Another pain point that occurs before the end of the communication between the doctor and the patient is the financial transaction that traditionally takes place at the end of the doctor–patient encounter. We suggest you reverse the payment process, telling the patient about deductibles, copays, and the anticipated visit cost, and collect the money before the patient is escorted to the exam room. Also, don't encourage the receptionist to ask, "Would you like to take care of your balance today?" The receptionist will usually receive a response that translates to "no." Instead, take care of the payment and financial transaction when the patient arrives in the practice.

Don't let making the follow-up appointment be the last interaction with the patient.

One alternative is to use technology to have the medical assistant arrange the follow-up appointment while the patient is still in the exam room. This makes the peak end more positive and allows the receptionist or scheduler more time to communicate with callers or new patients.

Use of Reputation Management Software

Don't forget that technology can create a positive experience for the patient even when they walk out the door and leave the practice. An effective program sends a follow-up to survey the patient, asking, "How did we do?" You want to know about the patient experience and how you can improve healthcare delivery. The patient intake technology also can send a customized thank-you note. These outstanding care management programs use artificial intelligence to send unique yet customized notes to patients who frequently return to the practice. This avoids the patient receiving the same survey or questionnaire after a return visit.

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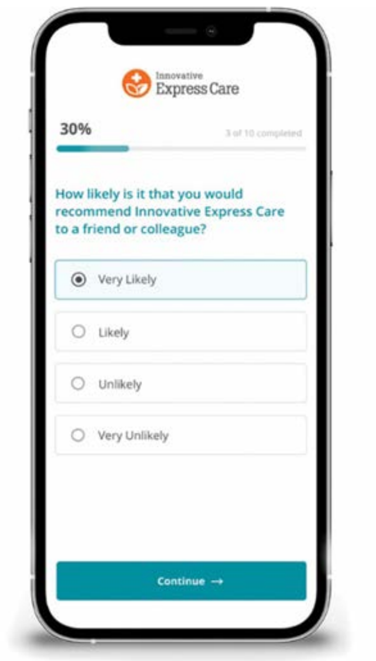

Figure 3: Use of cell phone to survey the patient's experience.

appointments. For example, a patient who is requested to return in 6 to 12 months is unlikely to remember to make a follow-up appointment. The program can be customized to send follow-up appointments at times designated by the practice or doctor.

The program asks if there have been any changes in insurance, new address, new conditions or diagnoses, and new medications. One of the benefits of these new technology programs is that there is no need to repeat the process of filling out forms at each return visit. Follow-up visits ask only for any changes since the previous visit, with the result that subsequent visits are more efficient and reduce the administrative burden for the staff.

The take-home message is that these technology programs tell patients that the practice and the doctors know them.

Improve Patient Reviews

More than ever, monitoring the practice's online reputation is essential. Doctors spend their entire careers protecting their reputations. Today, patients can damage a doctor's reputation with just a single click of the mouse. Therefore, keep-

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ing a pulse on your patients' satisfaction is imperative. Post-care surveys should prompt delighted patients to leave an online review while allowing unsatisfied patients to submit feedback.

New technology can capture patients' compliments at the point-of-service. It will undoubtedly enhance patient satisfaction surveys and the doctor's online reputation. Figure 3 shows a survey that is available using the patient's cell phone.

Patient Intake and Management System

When implementing a new patient intake and management system, consider a program without marketing ads, banner ads, or sales promotions. Let us never forget that providing medical care is a sacred experience between a doctor and a patient. Patient management

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technology does not replace the personal experience. Still, a good program can create an efficient, user-friendly experience, leaving the patient feeling positive about the encounter with the doctor.

Look for a vendor that customizes the doctor–patient experience. The program should incorporate the existing practice workflow. A single size or program does not fit every practice and every doctor. The best care management programs should be adapted to the practice; the practice should not have to adapt to the program. Ideally, in a perfect world, the patient intake and management system should work the way the practice works, not the way the computer programmer with no medical experience thinks would be best. Ask the vendor if the program was created by physicians or computer programmers. One size does not fit all.

The technology should be easy to navigate. The developers should be focused on removing barriers to patient engagement. Patient portals and apps have very low patient engagement because of the difficulty with access and poor design. When these antiquated programs have hurdles and obstacles, such as the need for passwords, usernames, and repeated logins, this results in poor compliance or use. However, if the engagement is as easy as that with Amazon.com, a significant increase in compliance is seen.

For example, imagine your patient's experience if they only need to click a hot link in a text message provided by your practice to access their pre-arrival intake/registration questions. Our studies of dozens of clients have demonstrated that removing these barriers has resulted in 84% of patients completing the important information before they arrive for their appointment.

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Bottom Line: The future of healthcare will be in managing the patient experience throughout the continuum of care. An effective care management system identifies the pain points and makes every effort to remove those negative interactions and create great moments of truth. The best software programs understand the patient experience and make every effort to manage that experience before the patient enters the practice, during their time in the practice, and even after the patient leaves the practice. You want to use medical intake technology that is constantly improving. It should be like the good farmer's fence—that is, always well-maintained, and always a work in progress. **PM**

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