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QUESTIONS TO ASK
WHEN CHOOSING A

PATIENT ENGAGEMENT SYSTEM



SOLUTIONREACH™

WHAT IS A PATIENT ENGAGEMENT PLATFORM AND HOW DO I CHOOSE ONE?



WHAT IS A PATIENT ENGAGEMENT PLATFORM?

At the most basic level, a patient engagement platform is focused on automated patient outreach. It consists of various tools that allow you to streamline communication between your practice and your patients, and—ideally—improve the quality of your outreach.



WHAT DO THEY DO?

From automated appointment reminders to patient newsletters, healthcare practices use patient engagement platforms to keep patients engaged throughout the continuum of care. The platform's tools and services are typically used to improve patient retention, education, reactivation, and even new patient acquisition.



HOW DO THEY WORK?

Patient engagement services are typically cloud-based, so—rather than buying the software off of the shelf—you “lease” the software and access the tools and services by logging in to a personal dashboard with your own account credentials.

Most patient engagement platforms automate patient messaging by securely syncing with practice management software to safely pull the patient and schedule data needed.



HOW DO I CHOOSE ONE?

There are a handful of these cloud-based platforms out there, and no two are exactly the same. Never fear!

Below we have reviewed the main functions of the services to aid you in evaluating potential systems. We've even given you a list of questions to use in your search to help you dissect the differences in the technology and capabilities of various platforms.

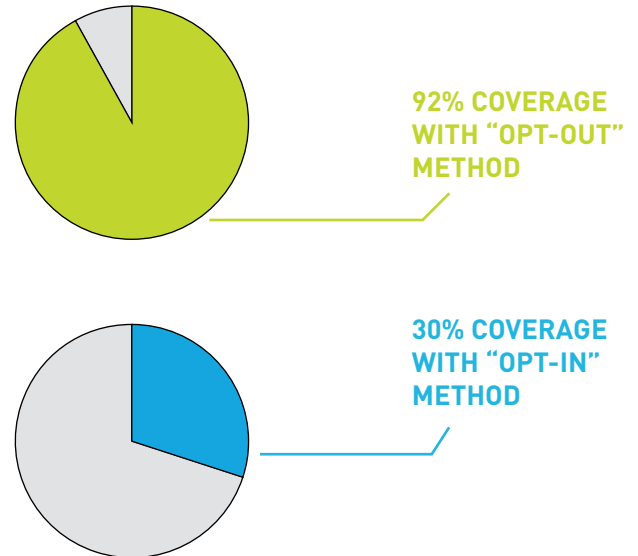
PATIENT MESSAGING TECHNOLOGY

First things first. Regardless of what platform you select, it will likely have one key thing in common with its competitors: automated patient messaging. Every platform you are evaluating should automate text and email messages to your patients. (If not, keep looking!)

But patient messaging technology is only as good as its capabilities. Here are some things to think about and questions to ask in your search.

REACHING 100% OF YOUR PATIENTS

The platform you choose has to be able to send texts, emails, and also automated phone calls on Day One in order to reach every single patient right off the bat. The whole point of using a system like this is to eliminate work for your staff and improve patient communication. If the system can't accomplish this... why bother? Here are the requirements:



1. OPT-OUT, NOT OPT-IN

IS THE MESSAGING OPT-IN OR OPT-OUT?

Most systems use an 'opt-in' method of digital messaging, which means you have to go through the trouble of signing everyone up before they will receive messages. Opt-in services only end up actually sending messages to about 30% of patients. On the other hand, opt-out services reach 100% from day one. After the initial messages, there is an average 8% opt-out rate, which means 92% of patients are reached long-term.

3. AUTOMATE LANDLINE CALLS

DOES THE SYSTEM AUTOMATE PHONE CALLS?

What about patients who don't use text or email? In order for a system to reach all of your patients, they have to cater to the patients who don't want a text or email. Additionally, you won't necessarily have mobile and email contact information for each patient. A system that doesn't automate phone messages just won't contact them!

2. INCLUDE EMAIL MESSAGES

AM I CHARGED FOR EMAIL MESSAGES?

Make sure your service fee includes unlimited email messages. Many services charge a fee for each email, which means you end up with extra fees or patients who don't get contacted.

4. UNLIMITED MESSAGING

HOW MANY MESSAGES CAN I SEND?

Many platforms limit the number of messages you can send, which means that you'll end up with either a lot of patients that don't get reached or a lot of fees you hadn't expected.

WHY DOESN'T EVERYONE USE OPT-OUT MESSAGING IF IT WORKS SO MUCH BETTER?

Most platforms use an external provider to send messages. Although healthcare messaging doesn't legally have to be "opted-in to" unless you are including marketing material, most other types of customer messaging does legally require getting the recipient's permission. Many messaging services make it an across-the-board requirement.

CUSTOMIZATION AND PERSONALIZATION

Patients will often disregard messages that look like they are coming from a third party. Choose a system that lets you customize the content of your messages to match your practice. Your patient engagement will be more personal and effective.

5. MESSAGE TEMPLATE PERSONALIZATION

WHAT CUSTOMIZATION OPTIONS ARE AVAILABLE FOR THE TEXT AND IMAGES IN DIGITAL MESSAGES?

A system that allows you to personalize your messages with custom images or text that matches the unique tone of your practice will help your patients feel more personally connected and engaged.

6. PHONE CALL PERSONALIZATION

DO AUTOMATED PHONE MESSAGES INCLUDE A NATURAL-VOICE INTRODUCTION FROM MY PRACTICE?

People have little patience for robots, which makes it hard to automate effective phone messages. Be sure you or a member of your staff can record a personalized introduction so patients know it's you when they pick up the phone.

7. PATIENT PREFERENCES

CAN I SET THE DELIVERY METHOD AND SCHEDULE FOR EACH PATIENT?

Make sure the platform lets you tailor each patient's message preferences, so they are contacted how, when, and how often will be best for them.

8. LOCATION AND PROVIDER-SPECIFIC

DO MESSAGES SPECIFY WHICH PROVIDER THE PATIENT SEES AND THE LOCATION THEY ARE SEEN IN, OR SIMPLY INCLUDE A GENERAL REFERENCE TO THE PRACTICE?

If your practice has more than one provider and/or location, eliminate confusion and frustration down the line by finding out if messages will automatically populate the correct provider and location details for each patient.



COMMON FEATURES OF A PATIENT ENGAGEMENT PLATFORM

We've created a list of features that may be available in the platform you are investigating. The list will explain why each feature may be included, what to look for, and how to know if it's right for you.

AUTOMATED APPOINTMENT REMINDERS AND CONFIRMATIONS

Appointment reminders that used to be delivered manually by office staff can now be automated by patient engagement systems. Automating the messages will streamline appointment reminder outreach. With the system that is right for you, you'll reduce no-shows and boost the efficiency of your office.



9. FREQUENTLY SYNC WITH YOUR PM

DOES THE PLATFORM SYNC WITH MY PRACTICE MANAGEMENT SYSTEM?

In order to automate messages the system has to be able to pull patient and schedule data from the PM, so make sure it works with yours. Also, find out if you are able to determine how often the sync will occur so you know your data remains current.

10. FAMILY MESSAGING

CAN A SINGLE REMINDER COVER MULTIPLE APPOINTMENTS?

To avoid overwhelming your patients, some systems will intuitively send only one reminder to mom or dad when the family has multiple appointments scheduled.

11. CONFIRMATIONS

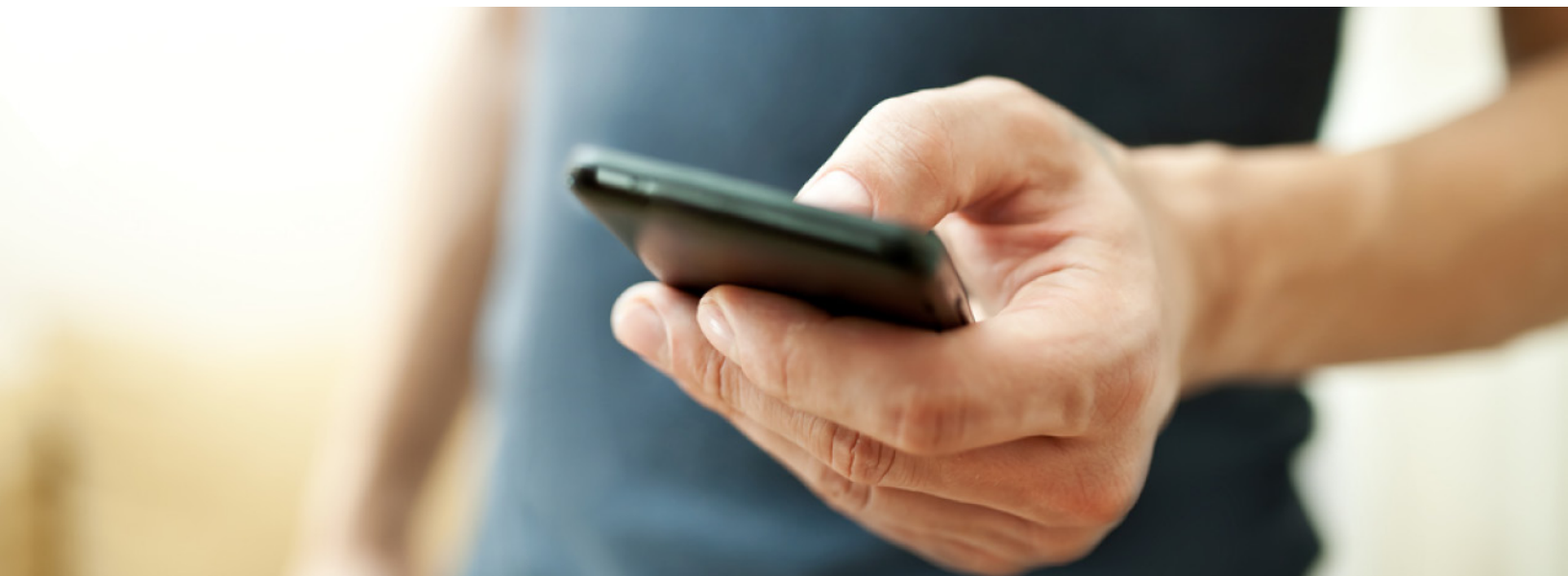
WILL THE REMINDERS INVITE PATIENTS TO CONFIRM THEIR APPOINTMENT?

Some systems allow patients to respond to your text, email, or phone reminder with just one word, click, or press of a button to confirm their appointment.

12. WRITE-BACK FUNCTIONALITY

WILL PATIENT CONFIRMATIONS AUTOMATICALLY APPEAR IN MY PM SOFTWARE?

If you are using a less popular software, you may find that a platform which will communicate with it may be difficult. In those cases, the confirmation should still show up in your platform dashboard so you can view it there or transfer it manually.



AUTOMATED PATIENT RECALLS

Platforms that automate recalls pull from the patient information to automatically notify patients when they are due for their next appointment. When done correctly, recalls are often the feature of a patient engagement system that delivers the most ROI.

Recall services vary from one system to another, so be sure to evaluate this feature when looking into potential systems.

13. REACH EVERY PATIENT

DOES IT AUTOMATE TEXT, EMAIL, AND PHONE CALL RECALL REMINDERS?

One of the biggest reasons to automate recalls is that it helps you be certain no patient is getting overlooked. If you can't use all all forms of outreach for your recalls, you most certainly will not reach every patient.

14. PERSONALIZED RECALL STRATEGY

HOW MUCH RECALL SUPPORT DO YOU OFFER?

If the system you choose doesn't have a support team that will assist you in setting up the recall services to help you meet your unique goals, the learning curve can negate the benefits of automated recalls.

15. ANALYTICS AND REPORTING

DOES THE PLATFORM INTEGRATE ANALYTICS FOR THE SUCCESS OF MY RECALLS?

You want to be able to SEE what it is doing for you, so pick a platform that shows you things like how many appointments have been made as a result of recall messages and provides a real-time report on how much revenue those appointments have generated for your practice.

WHY AUTOMATE YOUR RECALLS?



Automated recalls eliminate the inefficiencies of manual recall tactics, saving countless hours usually spent on making phone calls and sending postcards.



Automated recalls ensure that no patient is overlooked, keeping patients engaged in their health and on track with treatment or preventative care plans.



The increase in effectiveness when recalls are automated decreases patient attrition, which is common when patients aren't proactively contacted about routine or follow-up visits.



Automating recalls allows you to reduce overhead costs for labor and postage outreach, while increasing revenue by keeping your patients active and engaged.

E-NEWSLETTERS

E-newsletters are incredible tools for educating patients, highlighting practice news, or promoting services, but they can be time-consuming and hard to do if you aren't tech-savvy.

Some platforms have tools to help you create and send effective patient E-newsletters. If the feature is included with the platform you're investigating, dig in to determine whether or not it will deliver the results that are right for your practice.

16. PRE-WRITTEN CONTENT

IS THERE A LIBRARY OF PRE-WRITTEN ARTICLES THAT I CAN PUT IN MY NEWSLETTERS? HOW EXTENSIVE IS IT?

If you have to spend hours writing educational pieces to include with your outreach, you're missing out on a lot of the time-saving capabilities of this particular service.

17. TEMPLATE CUSTOMIZATION

CAN I CUSTOMIZE NEWSLETTERS?

Unless you have a staff member that is an HTML whiz, creating an engaging newsletter that looks professional can be nearly impossible. Find a system that offers user-friendly options for customizing or creating your own templates, as well as unlimited assistance in the event that you need help or suggestions.

18. EDUCATIONAL OR MARKETING NEWSLETTER CAMPAIGNS

CAN I CREATE SCHEDULED NEWSLETTER, EDUCATIONAL, OR MARKETING CAMPAIGNS?

Being able to send ONE newsletter is nifty, but the real benefit of automated systems comes from being able to create a set of newsletters and send them out using a delivery schedule you determine.

19. RECIPIENT GROUPS

CAN I TARGET SPECIFIC GROUPS RATHER THAN SENDING EVERY NEWSLETTER TO EVERY PATIENT?

You want to educate patients by giving them information that pertains to THEM, so choose a platform that lets you group patients who meet specific criteria (like women, families with children, people with certain conditions, etc.)

DID YOU KNOW?



Physical newsletters are rarely read. Sending newsletters via email means that nearly every patient will see and interact with it.



Using newsletters to educate your patients encourages engagement. Education for engagement plays a significant role in treatment adherence and health accountability.



E-newsletters make it easy to promote new services or offer deals for old ones that fill up your schedule and increase your ROI.



E-newsletters are FREE. No postage, no labor costs. Sending regular communication to your patients keeps your practice at the forefront of their minds, so they're less likely to fall off the grid.

PATIENT SURVEYS

If the platform you are investigating offers patient surveys, there are several key features to look for.

20. AUTOMATED SURVEYS

WILL THE SYSTEM AUTOMATICALLY SEND A SURVEY TO PATIENTS AFTER THEIR APPOINTMENT?

Asking patients about their experience right after their appointment gives you the ability to immediately address their concerns or complaints. You'll improve retention and prevent negative reviews from dissatisfied patients.

21. SCHEDULED SURVEYS

CAN I SEND A SURVEY TO ONE, ALL, OR SOME OF MY PATIENTS WHENEVER I WANT?

This feature may be valuable when you'd like specific patient feedback regarding a particular procedure, product, etc.

22. CUSTOMIZATION

WHAT PARTS OF THE SURVEYS CAN I CUSTOMIZE?

You can often choose the questions, but being able to customize the way patients answer allows you to be more specific (i.e. multiple response, written, rating).

WHY USE PATIENT SURVEYS?

- Automating surveys ensures that every patient is contacted. Every patient will feel like you value their opinion.
- Every patient will have the opportunity to complain to YOU before they complain on a patient review site and damage your online reputation.
- Surveys that automatically analyze the results can give you excellent insight on what needs to change, as well as which patients are your best options for referrals or positive reviews.

23. ANALYTICS AND ALERTS

HOW DO I UNDERSTAND THE RESULTS?

You should be able to tell the platform which question and answer combos are the most important to you and have it alert you when someone responds with answers that meet your set criteria.



ONLINE REPUTATION MANAGEMENT AND PATIENT REVIEWS

According to a 2015 local consumer survey*; 92% of people look online to determine the quality of local businesses. Your practice simply will not continue to thrive if you don't establish and maintain a positive online presence!

If the patient engagement platform claims to help with your online reputation, use the questions below to evaluate whether or not the service you are investigating is right for you.

24. MONITORING AND REPORTING

HOW DOES THE SERVICE HELP ME KNOW WHAT MY ONLINE REPUTATION LOOKS LIKE?

Does the system comb the web and find review sites where your practice is/should be mentioned? Choose a platform that provides you with easy-to-read analytics that will help you understand which sites need attention.

25. VIDEO TESTIMONIALS

DOES THE SYSTEM HELP ME COLLECT AND POST VIDEO TESTIMONIALS?

Posting a video testimonial to YouTube and using it to market your practice is one of the best ways to use your happy patients to generate new ones. If the platform integrates with a video collection tool, this can be done right from your front desk. Ideally, the platform will also help you use those videos on your website or social media page.

26. SOCIAL MEDIA

WILL YOU HELP ME USE SOCIAL MEDIA TO BOOST MY ONLINE PRESENCE?

Find out if the system includes in-platform tools to post content to your social media page and whether they will help you get started. Creating a custom banner or icon can be daunting, so select a company that includes the support you need to do it just the way you like it.

27. REVIEW COLLECTION AND POPULATION

HOW DOES THE SERVICE HELP ME COLLECT AND POPULATE PATIENT REVIEWS?

Find out how they request reviews (within reminders, surveys, newsletters, etc.) and whether or not they direct patients to the places that need the most attention...automatically.



MANAGING YOUR ONLINE REPUTATION INVOLVES:

- Monitoring review sites
- Encouraging patients to review your practice
- Populating review sites that need a boost (helping you show up in search results)
- Managing your local search pages
- Keeping an active online presence through social media



OTHER PATIENT COMMUNICATION

There are many types of outreach that can be included in a patient engagement platform, and they all have benefits. Find out which ones are included with the system you're evaluating.

28. WAIT LIST OR ASAP MESSAGING

CAN I SEND LAST-MINUTE OPENING TEXT OR EMAIL MESSAGES?

These messages will allow you to fill multiple empty slots all at once when day-of cancellations occur.

29. GROUP AND MASS PATIENT NOTIFICATIONS

CAN I QUICKLY SEND A MESSAGE TO A SPECIFIC GROUP OR ALL OF MY PATIENTS?

If an emergency arises and you have to cancel appointments, mass notifications for the day's patients eliminates the need to call everyone to reschedule.

30. BIRTHDAY WISHES

DOES THE SYSTEM AUTOMATICALLY SEND BIRTHDAY GREETINGS?

If the system sends birthday wishes, find out how much personalization it allows you to add (like picture or video greetings from your practice) and whether you can specify what time of day the messages go out. Not only do your patients feel important, but birthday messages are also a great referral tool!

ADVANCED TOOLS

Some platforms include additional tools for improving your practice. Here are some powerful features to look for in your solution:

31. PATIENT PORTAL

IS A PATIENT PORTAL INCLUDED WITH THE SERVICE?

24/7 access to front desk services is critical in today's thriving practices. Give patients more control over their ongoing care while saving time in your practice.

32. DIGITAL CHECK-IN

IS THERE A WAITING ROOM TOOL THAT LETS PATIENTS CHECK THEMSELVES IN?

Systems that offer a digital check-in tool will help you reduce inaccuracies and eliminate the need to sort and shred documents. You can also use the tablet for point-of-care education opportunities as a great way to engage your patients while they wait.

33. MOBILE MESSAGES

CAN I EXCHANGE SECURE MESSAGES WITH MY PATIENTS?

Sending messages that are HIPAA compliant is tricky, so find a system with a mobile app that lets you send secure messages.

34. MOBILE PAYMENTS

CAN MY PATIENTS SUBMIT MOBILE PAYMENTS?

A mobile payment option is more convenient for patients and can streamline billing procedures. Most importantly, it will dramatically improve the success of your outstanding payment collection.

35. PLATFORM INTEGRATIONS

WHAT OTHER VALUABLE SERVICES ARE INTEGRATED INTO THE PLATFORM?

For example, the Solutionreach platform is available with special integrations like CareCredit, Eyemaginations, and others.



COMPANY, CLIENT SUPPORT AND THE FINE PRINT

36. UNLIMITED TRAINING AND SUPPORT

DO YOU HELP ME TRAIN MY EMPLOYEES?

As with any service that involves technology, there can be a learning curve. Make sure training and support is unlimited and included, so you have the assistance you need in order to customize the platform to meet your needs. You won't be out of luck if your practice has some turnover.

37. SATISFACTION GUARANTEE

WHAT IF I DON'T LIKE IT?

This speaks for itself. If the company is confident that their system will work for your practice, they'll back it up by offering a way out should it not meet your expectations.

38. PRICE FOR LIFE

WILL MY PRICE GO UP IN THE FUTURE?

Whether it's because they've added on new features or just due to the rising cost averages in the industry, be sure to ask about what you can expect for the future of your pocketbook.

WRAP-UP

Patient communication, engagement, and relationship management technology is essential if you want your practice to grow while providing outstanding patient care. By asking the right questions, you'll be able to uncover hidden fees and find a platform that is right for you. With this guide by your side, you'll be on your way to healthier patients and a more successful practice.

SOURCE:

1. "Local Consumer Review Survey", BrightLocal

