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# The Expert Guide to Patient Engagement Software

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## Introduction

Patient engagement software is a powerful tool for hospitals, health systems, and medical groups, offering a wide variety of benefits to both medical providers and their patients. As healthcare becomes increasingly fragmented and patients continue to absorb more of the financial responsibility for their care, keeping patients engaged and driving satisfaction becomes more difficult without [digital tools](#). Patient engagement software can help healthcare organizations bridge the gap with solutions that extend their reach and create a high-touch patient experience without requiring the FTE's and resources of traditional patient outreach.

For many, patient engagement software goes hand in hand with automated appointment reminders and while appointment reminders are an essential component of a strong digital patient engagement strategy, there are now many more components to help expand patient engagement strategies and deliver even more results. This guide will cover all the benefits of patient engagement software, why patient engagement is important, how to use it, and how to select a partner and get started.

## What is Patient Engagement?

Before going in-depth on the details surrounding patient engagement software, it's important to define and give context to what patient engagement is and why it's important to healthcare providers and healthcare organizations. [Patient engagement](#) is a broad term used to describe a patient's participation in the healthcare services they use. The term "patient engagement" can apply to any patient and any healthcare setting, including inpatient care, emergency room visits, retail clinics, and outpatient care settings like doctors' offices, outpatient imaging centers, and more.

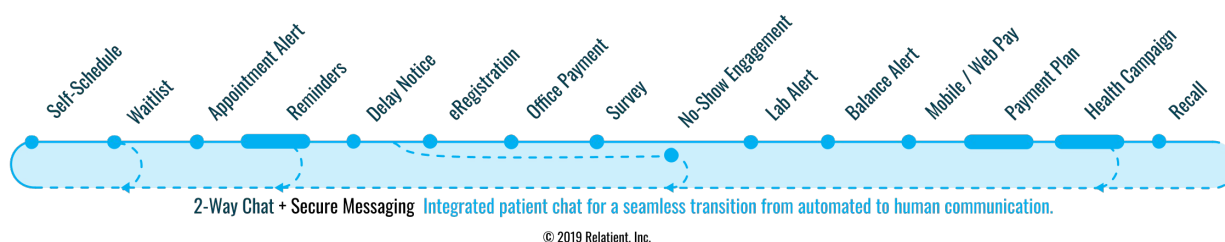
Patient engagement is important to healthcare providers because it's been shown to produce better patient outcomes and reduce healthcare costs. Achieving a high level of patient engagement can reduce readmission and redundant tests, speed patient payments, drive better adherence to care plans, support early detection of diseases, and more.

While driving patient engagement in the inpatient or hospital setting often includes strategies like including patients in daily rounding, technology to make education easier to deliver consistently, and post-discharge follow-up, outpatient settings have the unique challenge of engaging patients across multiple entry-points to the patient experience. Some of these entry-points include:

- Scheduling
- Registration
- Check-in
- Appointments
- Post-visit feedback
- Billing
- Patient recalls
- Patient education

## What is Patient Engagement Software?

Patient engagement software is a technology used by healthcare providers to automate and power communication with patients and makes it easy for patients to access their healthcare providers when they need them. First-generation patient engagement software solutions focused mostly on automated appointment reminders and were limited to one-way push communication to patients. Since this time, patient engagement software is often referred to as patient engagement platforms because they power several strategies for reaching patients and even make it possible for patients to reply to reminders. Best practice patient engagement platforms also write patient response data back into the scheduling or EHR software for added visibility and efficiency for medical office staff.



## Why Patient Engagement Software is Important

Patient engagement software is important because automation and digital tools create consistency and reliability that can't be matched by manual work and are more cost-effective, too. Medical practices can't consistently or effectively engage patients manually—even very small medical practices cannot realistically match the consistency in patient outreach that an automated system can create. Manual patient outreach relies on the availability of medical office staff to conduct the work and having records of patient outreach is dependent on consistent documentation. Additionally, manual patient outreach via voice calls is only effective if patients answer their phones because patients rarely listen to their voicemail messages and respond to voicemail even less frequently.

Patient engagement software extends the reach of a medical office, going beyond basic patient outreach for appointment reminders, recalls, and scheduling changes. Patient engagement platforms can now engage patients at touchpoints like patient registration and check-in the previously required patient to be present in the medical office and engage them digitally before an appointment and in the case of [telehealth appointments](#), without a patient ever appearing in-person at a clinic or medical office. Even patient billing now offers medical providers an opportunity to engage patients digitally.

Patient engagement platforms are vital to healthcare organizations that want to stay competitive in a rapidly changing healthcare environment. As patients absorb an increasing percentage of the financial responsibility for their medical care, they are more in tune with the experience and value they are getting from their healthcare providers. With this, patients are also holding healthcare providers to the same expectations they have developed from consumer industries that have been leveraging digital tools to create expanded access, self-service, and unprecedented ease and convenience. Patient engagement software and patient engagement platforms equip medical providers with the ability to offer their patients the access, self-service, and convenience that patients want, which improves patient satisfaction scores and can positively affect provider reimbursement.

## Benefits of Patient Engagement Software

The benefits of patient engagement software are well established in a variety of healthcare settings, including various sizes and structures. Small medical practices appreciate patient engagement



platforms because it enables them to compete in the marketplace and creates a sustainable extension of their medical office staff. Large healthcare organizations like hospitals and health systems recognize incredible cost savings and added revenue from patient engagement platforms and find that without automation and digital tools, they would not be able to replicate the ease of patient communication that patient engagement software provides. For healthcare organizations that have made significant financial investments in EHR systems like Epic, Cerner, and Meditech, patient engagement software can help them maximize ROI and drive higher portal adoption. Take a look at some of the other benefits of patient engagement software for medical providers and healthcare organizations.

### **Reduced Patient No-Shows**

Patient no-shows are a longtime problem for medical providers as they drive up the cost of healthcare, create gaps in provider schedules that can't be filled, and result in gaps in care. Patients who no-show for medical appointments are at higher risk for complications, higher acuity, and more complicated medical interventions later on. Patient engagement software ensures that patients are reminded of their medical appointments using established best practices for schedules and modalities used to communicate with patients and give patients the opportunity to confirm, cancel, or reschedule their appointments.

### **Higher Staff Efficiency and Productivity**

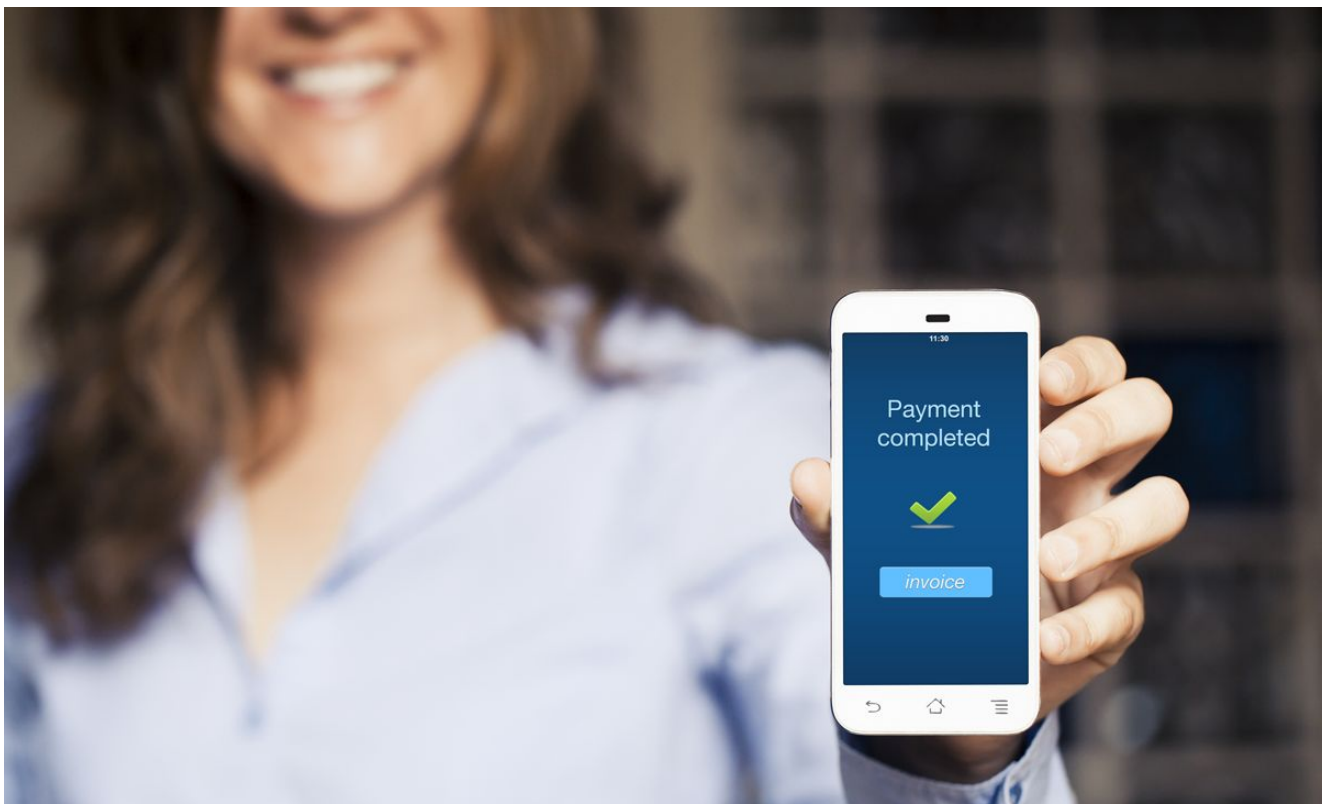
Because automated and digital tools reduce manual work and take non-skilled tasks off of medical office staff, they are more available to complete skilled tasks. Patient engagement software also



equips medical office staff with the ability to multi-task certain roles that previously could only be completed one patient at a time. A good example of this is one-to-one patient communication, which often results in patient phone tag—leave patient and medical office staff to call back and forth multiple times, leaving voicemails, and hoping to catch the other party on the next returned phone call. Patient engagement platforms that offer 2-way patient chat and secure messaging solutions power the ability for medical office staff to safely communicate in an SMS/text environment with patients. Because text messaging is widely accepted as the most preferred method of communication among patients of many demographic groups, this communication is much more efficient, enables staff to carry on more than one patient conversation at a time, and drives higher patient satisfaction.

### Increased Revenue

Patient engagement platforms engage patients at several touchpoints of the patient journey, keeping them on the schedule, increasing a practice's visibility in the market, bringing patients back into the practice for follow-up and preventive healthcare, and keeping provider schedules full. This drives higher revenue for medical practices and healthcare organizations, both by preventing the loss of appointments and by adding new patient appointments to the schedule. Patient engagement software often includes digital billing solutions, which can speed the collection of patient payments, reduce bad debt and write-offs, and further increase provider revenue.



### Decreased Costs

While the reduction in manual work and data entry accounts for some of the cost reduction that healthcare organizations see from using patient engagement software, additional cost reduction comes from using cloud-based technology that takes the place of hardware and equipment that requires upkeep, disinfecting, and general maintenance and troubleshooting. Patient engagement software also powers digital billing statements and mobile-first patient payments, reducing or even eliminating the need for paper statements that when combined with postage, and the manual work associated with mailing paper statements to patients.

### Better Patient Portal Adoption

Patient portals were developed by EHR systems in response to Meaningful Use, which mandated that patients have digital access to their medical information. Though well-intentioned, first-generation patient portals were designed as an after-thought and didn't represent the original intention of EHR systems—which were really built for medical providers. Though vast improvements have been made in the functionality and user-interfaces of patient portals since then, healthcare organizations still struggle to achieve portal adoption by over 30% on average. This is problematic as financial margins continue to shrink and organizations look to maximize ROI on their health tech investments. Patient engagement platforms can help healthcare organizations [achieve higher portal adoption](#) rates with patient outreach and messaging that engages patients outside the portal for anything that doesn't need to be guarded by a username and password and notifies a patient when there is something important they should access inside their portal account. Messaging can even include links to drive patients directly to the patient portal website and further ease the process of access personal health information.

## How to Use Patient Engagement Software

So what does patient engagement software look like in action? Here are key use cases for patient engagement software and patient engagement platforms.

### Automate Appointment Reminders

What once took at least one FTE in a medical office and often times more to manually call or email patients can now be automated with the most commonly used patient engagement solution, appointment reminders. This technology uses patient scheduling data, often powered by integration or API to the scheduling system itself, to reach out to patients in a variety of modalities to increase the likelihood of getting a patient's attention and prompting a response.

### Allow Patients to Self Schedule Appointments

Patient engagement software can power patient self-scheduling, also referred to as online or mobile scheduling. While the medical office can configure and maintain control over how patients access certain appointment types and even whether or not the system automatically approves each



appointment or requires staff approval, patients get the 24/7 access they have come to expect from other consumer-focused industries and providers have the advantage of filling the schedule even when no is answering the phones in their offices.

### **Make Patient Registration a [Pre-Appointment Activity](#)**

Traditional workflows require patients to complete a variety of forms and submit payer information upon arriving for their medical appointments. This workflow limits the ability for medical office staff to determine medical coverage, deductibles, and copays prior to patient appointments which also makes it more difficult to collect these patient payments. Traditional, manual patient registration is also dependent on shared materials like pens, clipboards, and paper and produces an enormous amount of manual data entry for medical office staff.

### **Power a Virtual Waiting Room**

With COVID-19 and the rapid rise in telehealth came a need for medical practices to change the way patients check-in and wait for their appointments. Virtual waiting rooms—also referred to as curbside check-in—quickly became the best practice for protecting both patients and staff and streamlining the patient check-in process. In place of signing a piece of paper at the front desk in a clinic, patients were offered the opportunity to either text the practice that they had arrived or use a mobile check-in solution that notified the medical office staff of their arrival. Patients could then remain in their vehicles while waiting for an exam room and provider to become available and the medical office would text the patient when it was time for them to enter the building and could take them straight to an exam or procedure room. Virtual waiting rooms are also helpful to providers offering telehealth, serving as a way to communicate with patients who are waiting for a provider to initiate a telehealth appointment.



### **Push One-Way Updates and Information to Patients**

Traditional patient outreach required manual phone calls and emails to patients when schedules changed, clinics closed, or new services became available. This often meant that medical offices had to set aside high-priority tasks to notify patients as quickly as possible when something would affect their appointments. With patient engagement software, this kind of mass messaging or broadcast communication can be done quickly and easily to as few or as many patients as needed within minutes. This functionality became even more important during the COVID-19 pandemic when information about safety protocols, access to clinics, providers, and telehealth, and later vaccine information changed rapidly and frequently and healthcare providers needed a way to push information to patients and staff quickly and easily.

### **Equip the “Phone Nurse” with SMS/Text Conversations**

It's common for medical offices to designate a “phone nurse” on some kind of rotation, this role fields patient phone calls throughout the day and triages patients over the phone, either advising them to come in to be seen by a provider, helping with prescription information, or answering clinical questions. The person in this role deals with a high level of inefficiency as patients navigate the practice's phone tree and often end up leaving a voicemail when the nurse is tied up on the phone with another patient, resulting in a game of nurse-to-patient phone tag that frustrates everyone.

[Secure messaging](#) equips nurses in a medical practice with the ability to respond to patients, even viewing and sharing pictures and documents when needed, to help patients navigate healthcare decisions and access care when needed.

Nurses can use this same strategy to reach out to patients post-discharge from an inpatient hospital stay or outpatient procedures. Because text messages are viewed and responded to more frequently and more quickly than any other form of communication, it makes more sense to follow-up with patients using this communication strategy and increasing the likelihood that patients will respond. Similarly, if patients are recovering from illness or injury, text messaging reduces the likelihood that a nurse calls the patient while they are resting and gives the patient the ability to view and respond to messages when they want to.

### **Add New Appointments to the Schedule & Reduce Gaps in Care**

While highly engaged patients are less likely to miss appointments or fall off track with preventive and follow-up care, it still happens and medical practices will always experience a mix of highly engaged patients to very disengaged patients. Patient engagement platforms can help automated outreach that is specifically targeted at re-engaging patients who are behind in aspects of their healthcare and educate patients about new services, tests, or vaccines that are available to them. These patient engagement solutions, often referred to as health campaigns, can include links to self-scheduling opportunities or short links and codes to securely indicate to a medical office which service or healthcare need a patient is trying to schedule.

### **Simplify Patient Billing**

One of the biggest shift in healthcare over the past many years has been the steep rise in patient financial responsibility, something that presents new challenges to healthcare organizations and medical billing as collecting payments from patients is more time-consuming, more expensive, and results in a longer revenue cycle than collecting from third-party payers. Patient engagement software can simplify patient billing, offering both patients and providers a better experience. For patients who want transparency in their bills and statements, access to payment plans, and 24/7 access to making quick payments—patient engagement platforms can power mobile-first billing that allows patients all these things outside of a portal, app, username, or password. Patients can receive text messages with their balances, a link to a clear statement, and the ability to make a payment or even keep a credit card on file for automated payments on smaller balances. For medical providers and billing offices, digital billing solutions can speed patient payments, reduce paper statement costs and manual work, reduce bad debt and write-offs, and more.

### **Collect Patient Feedback and Power Service Recovery**

Because patients are so responsive to text messaging, [patient satisfaction surveys](#) that concise, delivered within 24 hours of the patient appointment, and delivered via text offer healthcare organizations an incredible tool for collecting patient feedback and recovering dissatisfied patient experiences quickly. Many patient engagement platforms include a survey solution that leverages the same technology and best practices for patient communication that are effective across the rest of the platform.

### **Generate More Online Reviews**

Some patient engagement platforms power a reputation management solution that makes it easy for patients to leave positive reviews for their medical providers online. Providers can determine a review site of their choosing and direct patients directly to the review site via a short link in a text message. The more tightly the message delivery is to the time of the appointment, the higher the likelihood that a patient will leave a review.

### **Automate Your Waitlist**

As important as it is to know ahead of time if a patient won't be able to appear for their medical appointment as-scheduled, this information is most helpful if it's backed with an automated strategy for filling last-minute cancelations. While many medical practices keep a waitlist for patients who are interested in getting into the provider earlier than their scheduled appointment, few have time or resources to manually call through a waitlist to effectively fill cancelations. Patient engagement software can power automated waitlists that text patients in order of their place on the waitlist, continuing until a cancelation is filled. This keeps medical office staff free to tend to patients in the office and who need help instead of dialing through a list of patients and leaving voicemails.



## How to Measure ROI from Patient Engagement Software

How do you know if your patient engagement software is delivering results for your organization? There are a number of measures that can help an organization determine if they are getting the value they were promised from their patient engagement software vendor. It's important to know that having baseline data for each measure is paramount to being able to compare results over time and understanding how a patient engagement platform has delivered results.

### Patient Engagement Software—Measures of Success:

- Patient no-shows
- Appointment vacancies
- Total number of weekly and monthly appointments
- Patient payments
- Accounts receivable days/ days to collect (by payer)
- # of online reviews
- Average patient satisfaction rating
- Patient time waiting
- Portal adoption and utilization
- New patient appointments
- New patients added
- Incoming call volume
- Ease of reporting for MIPS, PCMH, and other quality initiatives

## Selecting a Patient Engagement Software Vendor

Chances are high that you're already working with a patient engagement vendor of some kind, though you may not have everything you need or be getting the results that you expected when you signed the contract. Because there are so many patient engagement vendors in the marketplace and many EHR and practice management systems also offer components of patient engagement as add-ons to their base platforms, it can be difficult to sort through the options and determine which option will serve your organization best. Here are some things to consider when evaluating various vendors.

### Communication Modality

Does this vendor offer voice, text, and email? Do they charge extra for any one of these modalities? Using a combination of voice, text, and email helps ensure you'll capture the attention of all your patients and their communication preferences, a vendor that can't accommodate this best practice may not be a good fit.

### HIPAA, SOCII, TCPA, and CAN-SPAM

Be sure to ask each vendor you're considering how they're ensuring you'll meet regulatory and privacy requirements when it comes to patient messaging and how they're keeping data safe, private, and secure. Industry leaders, like Relatient, will have security and privacy built into the patient engagement platform, be either HITRUST or SOCII certified, and utilize best practices in patient communication.

### Implementation & Training

Who does the heavy lifting? Will this vendor offer you dedicated resources to ensure your project stays on track and gets completed on time? What do handoffs look like? If you'll be responsible for pulling significant FTE resources to dedicate to this project, you may want to evaluate other vendors who are committed to lightening the burden.

Does training cost extra or included in your implementation? Training is key to the success of your go-live and long-term ROI, so be sure to partner with a patient engagement platform that will be around to help with training after go-live and offers manuals and guides for new employees.

### Long-term Support

Where will help be when you need them? How do you initiate a support case if you need help troubleshooting or making changes to locations, providers, appointment types, or messaging? Be sure the vendor you select is committed to your long-term success and will be easy to access when you need them. Ideally, they should offer a combination of phone support to complement the digital submission of support tickets so live help is available.





### **EHR/ Practice Management System Integration**

Access to patient response data is key to driving efficient workflows, equipping staff to respond quickly to patients who need to make changes to their appointments, and anticipating the schedule each day. The patient engagement software you select should be able to integrate with your scheduling data, whether that's in your EHR or a different practice management system. Ask your prospective vendor how data comes back and forth between the two systems and how your staff will be able to access patient responses.

### **Platform Capabilities**

While you may only be interested in starting with some of the basics of patient engagement software, like appointment reminders, broadcast messaging, and patient chat, you'll likely be looking to expand your digital patient engagement strategy at some point in time. When you're ready to add functionality like patient self-schedule or digital registration and intake, you won't want to start at square one with an additional new vendor. Look for a [complete patient engagement vendor](#) who can help you expand your strategy and scale to your organization's needs on your timeline.

## Conclusion

The patient engagement software market has grown a lot in recent years as the need to help patients navigate healthcare increases alongside their expectations for digital access and convenience. Sorting through patient engagement software vendors can be overwhelming but there are differences between industry leaders and those with more limited functionality. Integration to the other systems, platforms that encompass all the important patient touchpoints, scalability, and security and regulatory compliance built-in are some of the keys to identifying vendors who can deliver the results your organization needs.

Patient engagement software is essential and accessible to healthcare organizations of all sizes thanks to cloud-based technology that can be easily integrated with a wide variety of EHR and practice management systems. This is great news for small group practices to large health systems who are all looking to help patients take better control over their health and deliver higher patient satisfaction while working with fewer staff resources and increasing demands.



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