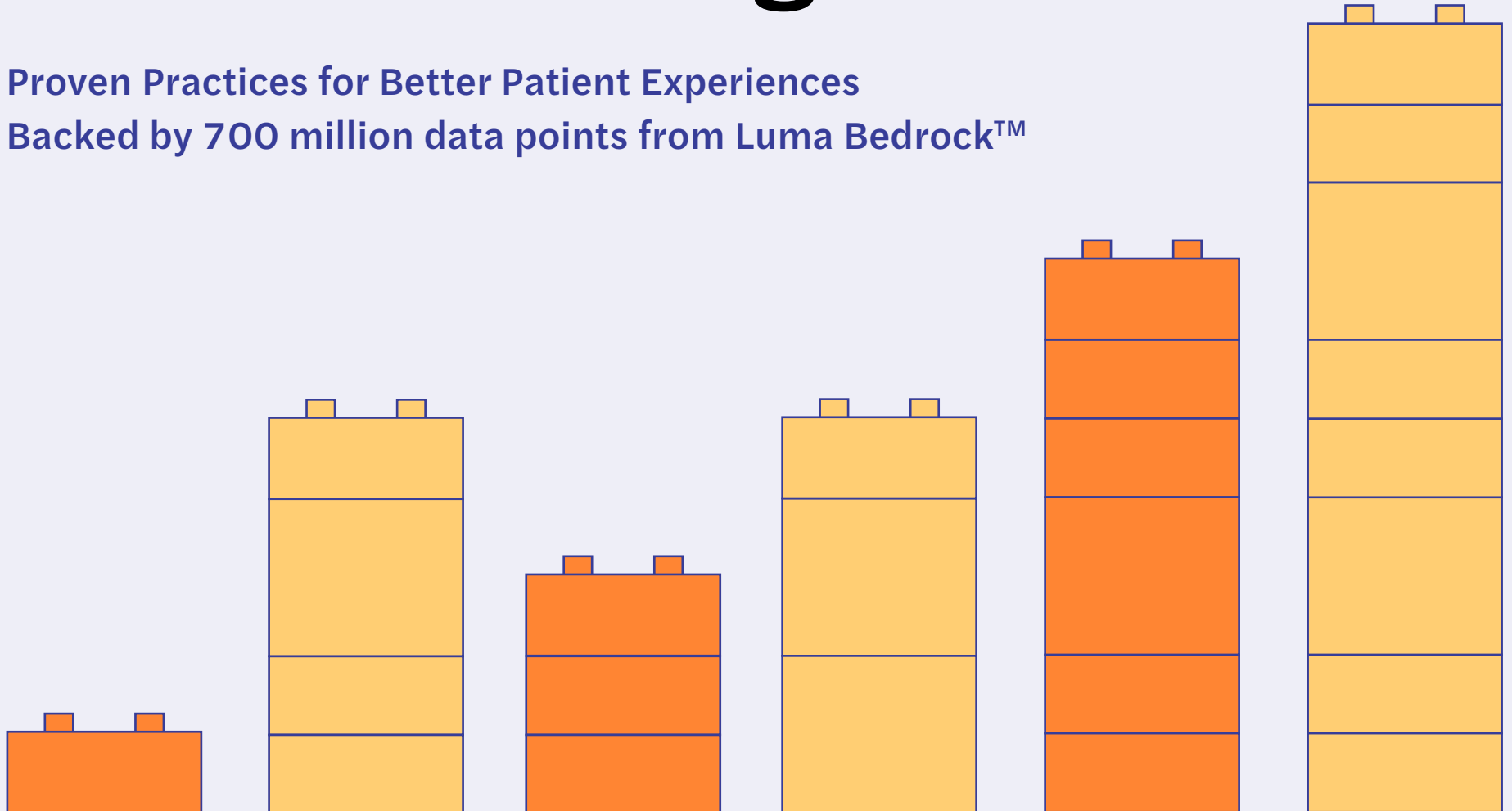




A Guide to Patient Success through Data

Proven Practices for Better Patient Experiences

Backed by 700 million data points from Luma Bedrock™



The Right Message, The Wrong Channel

The buzz and ping of constant notifications have become a familiar (and perhaps unwelcome) part of daily life. In our digital age, we receive messaging 24/7 through our phones, computers, text messages, social media, and more.

A recent Telefonica study found that the average smartphone user receives an average of 63.5 notifications per day.

This constant digital bombardment is not only personally annoying, but it also hinders the development of meaningful connections. Patients desire the same ease and clarity they experience in digital conversations with friends and family when communicating with their healthcare providers. Meanwhile, providers face the challenge of engaging patients without contributing to the overwhelming digital noise that already exists.

“ We’d like to do it all. Get patients in faster, keep a full schedule, ensure patients stick to their care plan, engage and guide them once they leave, and get them to return for follow-up care. **But, we struggle to simply reach our patients.**”

James Hereford

President & CEO | Fairview Health Services



Six Data-Backed Strategies for Patient Success



Aditya Bansod

Co-founder and CTO

Luma Health

“The healthcare industry has been a catalyst of change for the last several decades, ushering in exciting innovation and advancements. But throughout these changes, one voice has too often been missing from the conversation: the voice of the patient.”

Studies continue to show that when a patient is engaged in their care, outcomes change for the better. But especially for busy people already overloaded with 24/7 communication, it's critical that healthcare updates are delivered at the right time and in the right channel.

This guide aims to assist in finding a balance. It provides data-backed methods for orchestrating a communicative patient journey that goes beyond being just another notification in the sea of daily messages. Instead, aiming to be a genuine source of connection for Patient Success.

The recommendations included are based on Luma Bedrock™, a collection of strategic recommendations backed by over 700 million data points and insights gained from serving more than 650 healthcare organizations for over 8 years. Luma Bedrock was designed to provide a strong, data-backed foundation for your patient communication workflows.

From optimal appointment reminders to automated patient self-scheduling, discover actionable data-driven strategies that will help break down the barriers between you and your patients.

STRATEGY ONE:

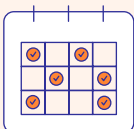
Self-Scheduling is Non-Negotiable

The ability to self-schedule appointments is a high priority for patients. Because it mitigates the need to call to schedule, it also reduces barriers to care and reduces workload for your staff.

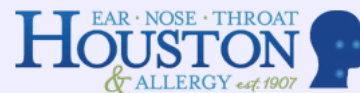
Making self-scheduling as simple as possible – while taking into account your organization's policies – maximizes the benefits of self-scheduling and helps you bring more patients in for care.

BEDROCK INSIGHT

Patients are more likely to book an appointment when they're shown more available times.



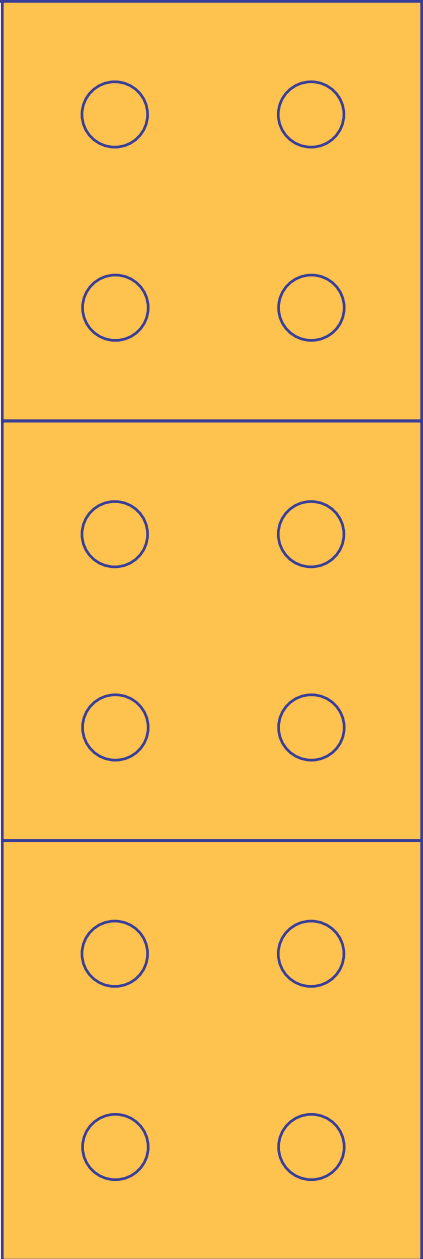
At Houston ENT & Allergy, self-scheduling integrated with their EHR helps patients choose available times. With easy access on the website's home page, **Houston ENT & Allergy saved \$1.8 million in prevented no-shows.**



What the Data Says

Our data suggests making the self-scheduling process quick and simple, while still gathering necessary information from patients. Doing so helps reduce drop-off rates, where patients don't schedule or call to schedule instead. For example:

- ✔ Overall, ask only must-have information totaling 6 questions or fewer.
- ✔ Consider moving some information, like insurance details, to pre-visit intake forms instead of requiring it to schedule. A majority of patients who didn't complete the self-scheduling process in our data set dropped off when asked an insurance question.



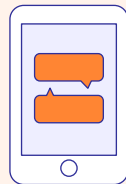
Simplify Rescheduling

Making rescheduling as simple as possible for patients has a direct impact on your provider utilization, your staff's time, and your bottom line.

Providing patients with a simple way to reschedule avoids “digital dead ends” that can create no-shows, impact your expected appointment volume, and create more work for your staff.

BEDROCK INSIGHT

Patients are 34% more likely to reschedule if they can do so directly from SMS instead of being directed elsewhere.



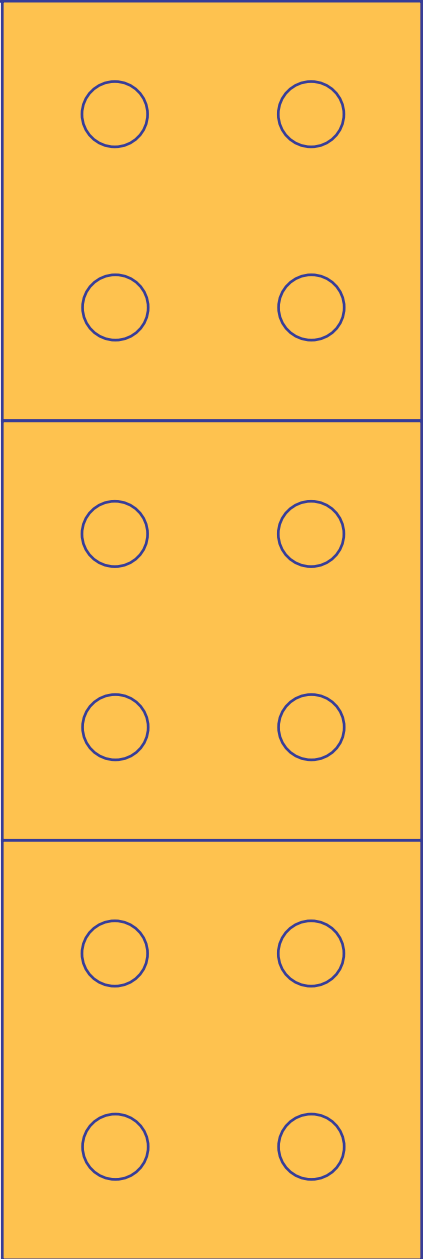
Ryan Health reschedules nearly **400 appointments per month** with Luma that might otherwise be left unfilled.

Ryan Health
Caring for New York. Here for You.

What the Data Says

Avoiding extra steps for patients increases the likelihood that they'll reschedule.
For example:

- ✓ Add the ability to reschedule directly to a reminder message instead of directing patients to a separate website.
- ✓ Configure SMS reminders to automatically prompt patients to reschedule if a patient responds with a certain keyword, such as "I need to reschedule."



STRATEGY THREE:

Learn About Your Patient Population with Real-Time Feedback

Nearly every healthcare organization has an online presence, and reviews are an important way that patients find and choose new providers. But without a process in place for encouraging patient feedback, these reviews can be heavily skewed toward occasional negative reviews and harm new patients' impressions of your organization. In addition, you might not have a chance to follow up with patients personally to resolve their feedback and ensure a better overall experience.

Luma community members have shared that consistent requests for patient feedback, combined with a process for addressing any complaints, improves both patient experience and the organization's online presence.

BEDROCK INSIGHT

Patients respond better when reminders are sent after the workday or on the weekend – unless they need to schedule a new appointment, when this trend is reversed.



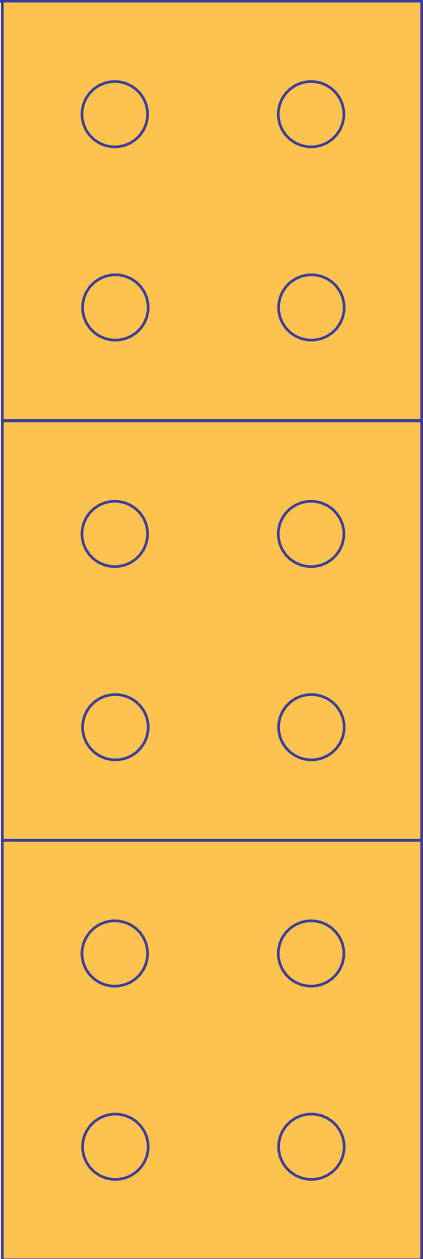
Tenaflly Pediatrics utilized automatic feedback requests to improve their Google review scores, enabling them to remain competitive in a saturated market. **They achieved an NPS score of 92.82 based on feedback from over 11,000 responses.**



What the Data Says

Patients don't always respond to optional requests for feedback, so the most key factor for improving reviews is consistently sending requests across your patient base. However, they're more likely to respond when these requests are infrequent:

- ✔ Limit how many times an individual patient is asked to rate your organization. Even if they're seen more often, we recommend asking each patient for feedback no more than twice per year.



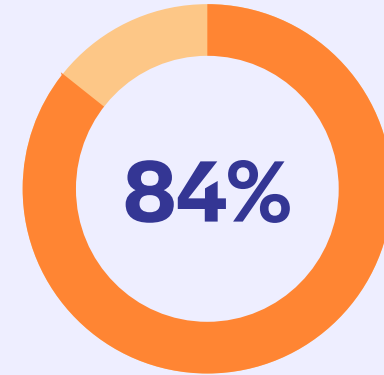
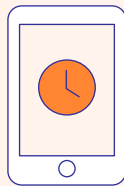
Use Reminders to Maximize Patient Response Rate

Healthcare organizations using Luma send an average 400,000 reminders to patients each weekday. These reminders contain a variety of actions for patients, from “confirm your appointment” to “complete your intake forms ahead of time.”

We’ve learned that it’s critical for patients to respond to messages you send that require an action – these actions can often save significant staff and patient time on appointment day and avoid time-consuming phone tag.

BEDROCK INSIGHT

Reminders sent less than 24 hours before an appointment are most effective.



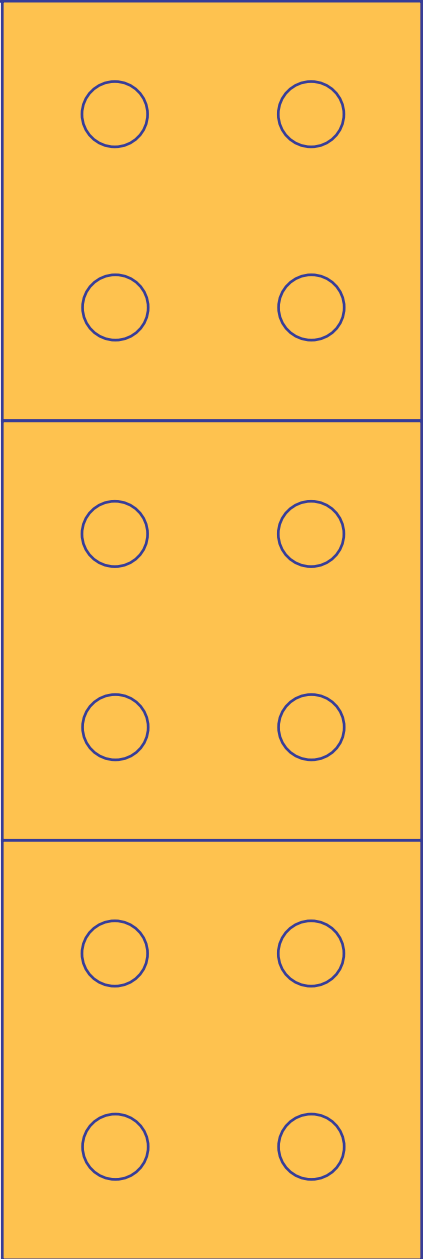
At St. Paul Eye Clinic, **84% of patients have their intake paperwork done before visits** with actionable pre-visit reminders. The advance prep saves an average of 11 minutes per patient in the office.



What the Data Says

Overall, our data points to making reminders as immediately actionable as possible. Doing so helps your messages stand out amongst the high volume of digital communication patients receive, builds trust in your organization, and makes responding simpler. For example:

- ✔ **Consider reducing the number of reminders and the length of your individual reminders. The data showed that patients are unlikely to respond to messages over 400 characters, for example.**
- ✔ **Send reminders close to patients' appointments, not far in advance. The data showed that response rates improved the closer a reminder occurred to the appointment date.**



STRATEGY FIVE:

Save Staff Time with Automated Care Follow-Up

Automated SMS recall reminders help bring patients in for follow-up care without additional manual calls from staff.

If you aren't sending recall reminders, but use SMS already, sending these reminders is another tool available to you to fill schedules and keep patients up to date with their care, without requiring additional staff time.

BEDROCK INSIGHT

Smaller practices see the best results when recall messages allow patients to self-schedule.



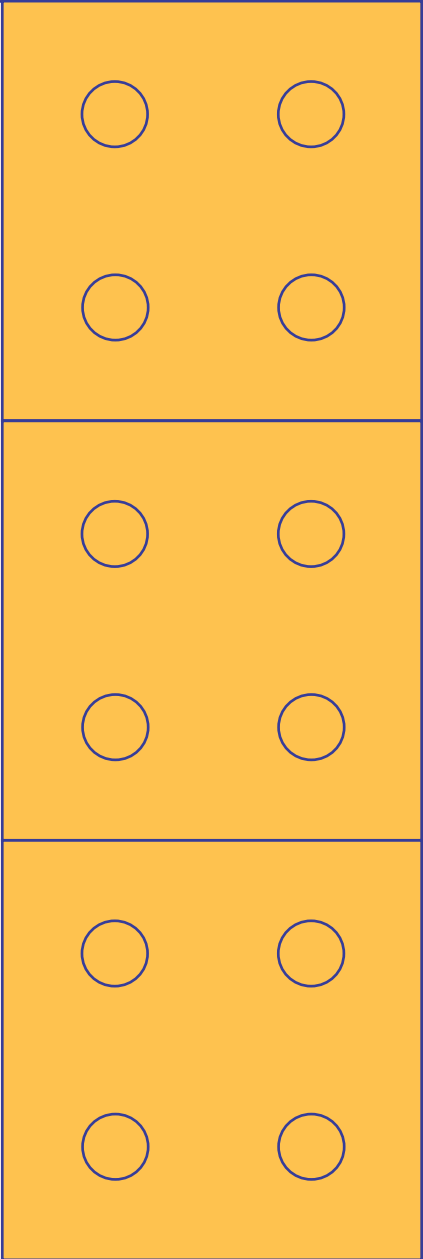
Digestive Health Specialists partnered with Luma to send automated recall messages based on data directly from their Epic EHR, reducing potential care gaps. **In one year, Luma sent recall reminders to over 22,682 patients.**

Digestive
Health Specialists, P.A.
Caring for You, Close to Home.

What the Data Says

Keep timing in mind. Our data findings note that recall reminders should be sent with a padded time frame – not too close to when the appointment is due, but also not too far in advance.

- ✓ About 3 months out, for example, is close enough to feel timely but far enough out for patients to have convenient times to choose from.
- ✓ Remind patients in a few words why it’s important that they be seen. Doing so can motivate patients to self-schedule.



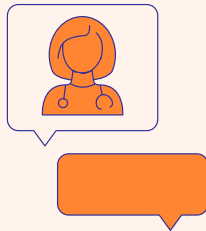
Attract and Keep New Patients with Automated Referral Outreach

Every healthcare journey is complex, and often, not a “one-stop shop” with any one provider. For specialty practices, referrals are a key method for procuring new patients and staying competitive. For FQHCs, similar outreach is needed to reach attributed patients who might not have been seen at the organization before. In each of these cases, reaching patients who might not have even heard of your organization is a core part of your success.

Luma customers have shared that quick, automated outreach to a list of referred or attributed patients is crucial to reach as many as possible without hours of manual calls.

BEDROCK INSIGHT

Patients are 3x more likely to schedule if the referral reminder includes the name of the referring provider.



At University of Washington Medicine, automatic referral messaging notifies patients when their referral is created and when the referral status is updated, keeping patients informed every step of the journey.

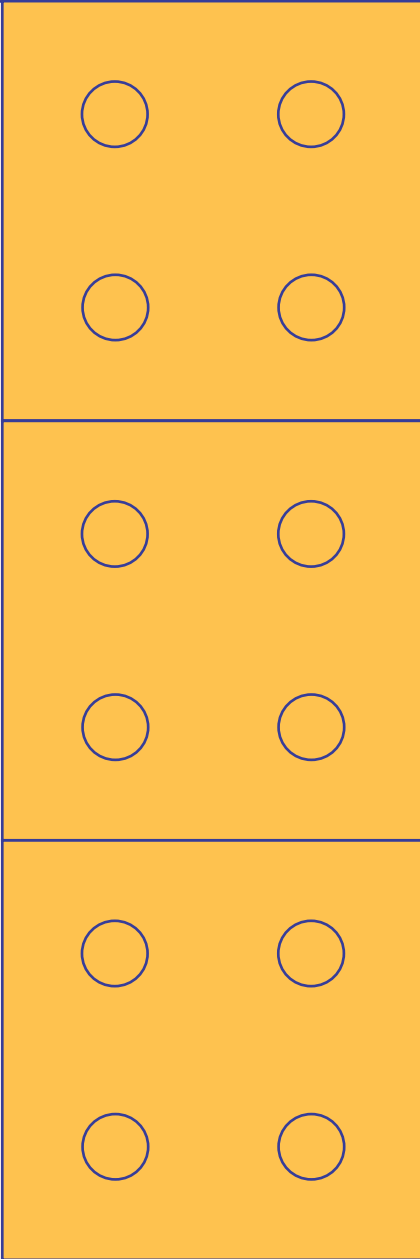
UW Medicine now achieves a referral conversion rate of over 40% and has reduced the time it takes to schedule a referral by 4.5 days.

UW Medicine

What the Data Says

Building credibility and making it convenient for patients to respond are critical to reaching referred patients, who likely have many choices for where to receive their specialty or follow-up care. For example:

- ✓ **Add credibility to your referrals by including the referring provider’s name in the message, which significantly increases patient responses.**
- ✓ **Avoid reminding patients about referrals on the weekend or late in the day – our data shows that patients are least likely to respond at these times.**
- ✓ **Don’t overdo your reminders. According to our data findings, patients who plan to schedule their referral will do so quickly, whereas patients who don’t plan to schedule won’t do so, regardless of the number of reminders they receive. Sending more than 1-2 reminders risks patients opting out of future communication.**



Recommendations & Next Steps

SO, WHAT'S NEXT?



Level up your organization's patient success with these three actionable recommendations. By implementing these strategies, you can improve patient interactions and create a more connected healthcare ecosystem.

- ① **Ask Your Patients for Their Preferences**
- ② **Build Your Digital Experience With Busy Patients in Mind**
- ③ **Deliver Next Steps Directly to Patients**

① Ask Your Patients for Their Preferences

It's simple, yet effective – when you ask your patients for feedback, not only is the patient empowered to be more engaged, but your practice receives real-time data about what is or isn't working.

When Houston ENT and Allergy realized patients weren't responding to automated scheduling calls, they asked patients for feedback. The team learned that patients often weren't able to pick up the phone during their workday, and switched to SMS-first communication instead. Patients now have a better experience – many choose to schedule online, and for those who do need to call, the wait times are significantly shorter.

Some organizations choose to create a patient feedback council for regular consultation. In a competitive market, staying current on patient feedback can help you provide a differentiated patient experience that gets patients in the door.

BEDROCK TIP

Remember to follow up with patients after making initial changes to understand whether the updated approach is better fitting their needs.

“**Our abandoned calls dropped over 50%** and patients are less frustrated, knowing they can schedule anytime they need and not play phone tag or sit on hold for a long time.”

Chuck Leider

CEO | Houston ENT & Allergy

② Build Your Digital Experience With Busy Patients in Mind

You haven't imagined it – the pace of healthcare is faster than ever, both for providers and patients. The healthcare experience you provide has to be able to meet your population where they're at, and with their preferences in mind.

"It's not feasible to ask patients to wait until 8AM the next day to call in for an appointment," said Farooq Ajmal, CIO at Ryan Health in New York City. "With Luma, patients have 24/7 access. I've even seen patients change appointments on Saturday at 2AM."

Ryan Health reaches over 60% of their patient population with Luma reminders, generating an additional \$322,575 in appointment revenue in six months.

Building flexible communication options for your patients allows them to stay connected to their care journey, at their convenience.

Likewise, keep communication brief and easy to understand (at a 6th grade reading level or below) so connecting with you requires less effort from busy patients.

BEDROCK TIP

Consider whether patients with a variety of schedules and preferences have digital options to engage with your organization.

“It's not feasible to ask patients to wait until 8AM the next day to call in for an appointment. **With Luma, patients have 24/7 access.** I've even seen patients change appointments on Saturday at 2AM.”

Farooq Ajmal

CIO | Ryan Health

③ Deliver Next Steps Directly to Patients

Keep it streamlined – when you eliminate extra steps for patients, their engagement increases. If your organization struggles with a patient experience pain point, like low patient portal sign-ups, it's possible that patients are being asked to jump through too many hoops.

At Seaview Orthopaedics, for example, new patients needed to email to request a new appointment, while existing patients needed to call to reschedule. Both patients and staff were frustrated by the extra steps.

Now, both new and existing patients can book online, and next steps are delivered directly to patients on the schedule via SMS.

Consider gathering patient feedback on their biggest struggle getting in for care, then evaluating whether that process can be streamlined or patients can be empowered to do more of the process on their own.

BEDROCK TIP

For organizations that prioritize enrollment in a patient portal, delivering a personalized sign-up or log-in link via text and explaining what information patients need to access in the portal can boost adoption.

“ We wondered, **how many new patients did we lose by not calling them back soon enough?**”

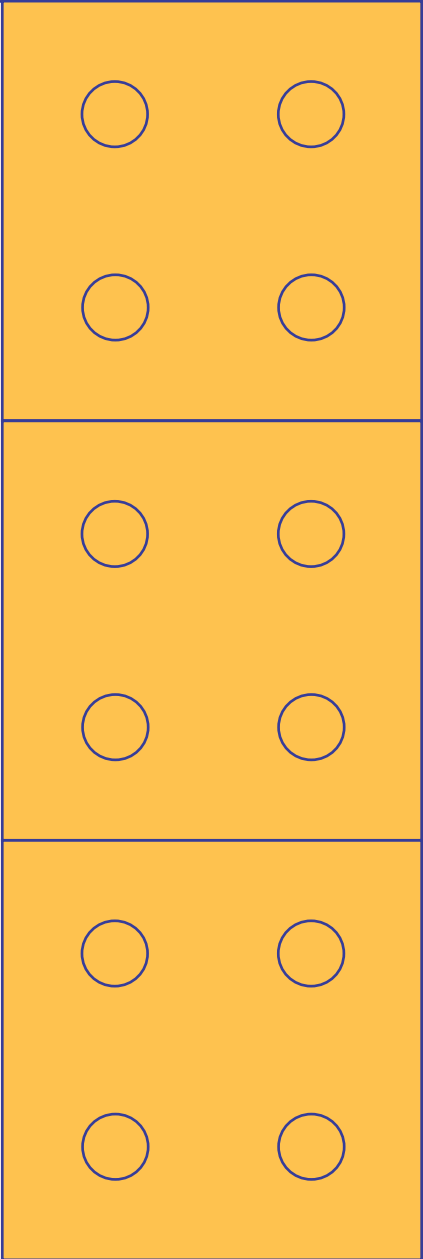
Micheal Gibson

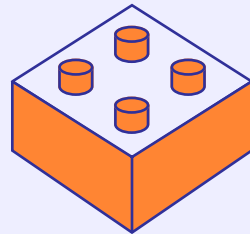
Director of Marketing, Business Development,
& Patient Engagement | Seaview Orthopaedics

Want more Bedrock insights?

Luma community members have free access to Bedrock Insights through the Luma Help Center. Sign in to your account on support.lumahealth.io and you'll be able to access Bedrock insights, data, and recommendations that you can immediately put into practice.

If you're not yet a Luma community member but are interested in learning more about building a stronger connection with your patients using Bedrock, reach out to a member of the Luma team at lumahealth.io.





Learn more at
go.lumahealth.io/bedrock

