

Progress, Not Perfection: Care Access in the Digital Era

300 Hospitals and Medical Groups
Weigh In on Digital Patient Engagement
and Operational Efficiency



INTRODUCTION

Healthcare's Digital Shift: Progress Achieved, Opportunity Ahead

The healthcare industry is at a pivotal juncture in its digital transformation journey. Over the past decade, medical groups, hospitals, and health systems have embraced digital-first strategies in response to growing consumer expectations for seamless experiences. But despite widespread adoption, challenges remain—many organizations feel that their patient workflows are not fully optimized, especially those managing a large number of different vendors. Still more feel that arrival management workflows are detracting from the patient experience, a dynamic that is amplified for organizations using solutions built in-house or provided by their EHR vendor. Opportunity remains for healthcare organizations to optimize and expand utilization of digital tools to better meet patient-centric goals and help teams work more efficiently.

About the Survey

Findings in *Progress, Not Perfection: Care Access in the Digital Era* are based on a survey of 300 healthcare administrators at medical groups and small to medium health systems by Wakefield Research in July 2024 on behalf of Kyruus Health.

All sample sizes in the report are n=300 unless otherwise noted. Percentages may not always total 100% due to rounding.

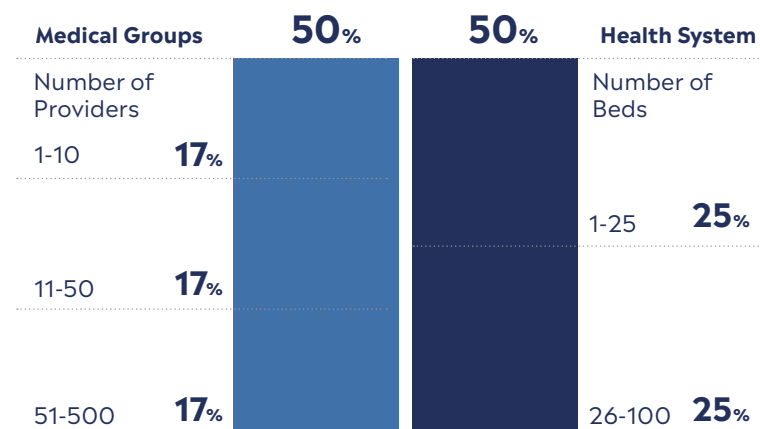
Size:

300 practice managers, administrators, and front office staff managers

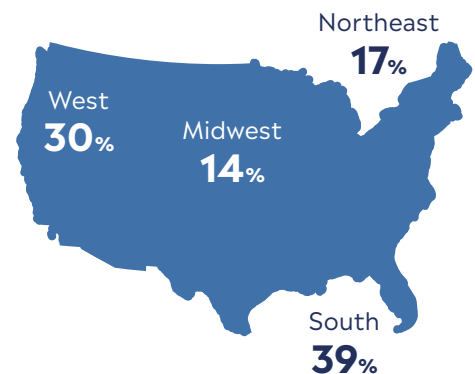
Date:

July 2024

Organization Type:



Location:



Greeting Patients on the Digital Doorstep

100%

of organizations surveyed now use digital solutions to manage 5 or more major patient-facing workflows.



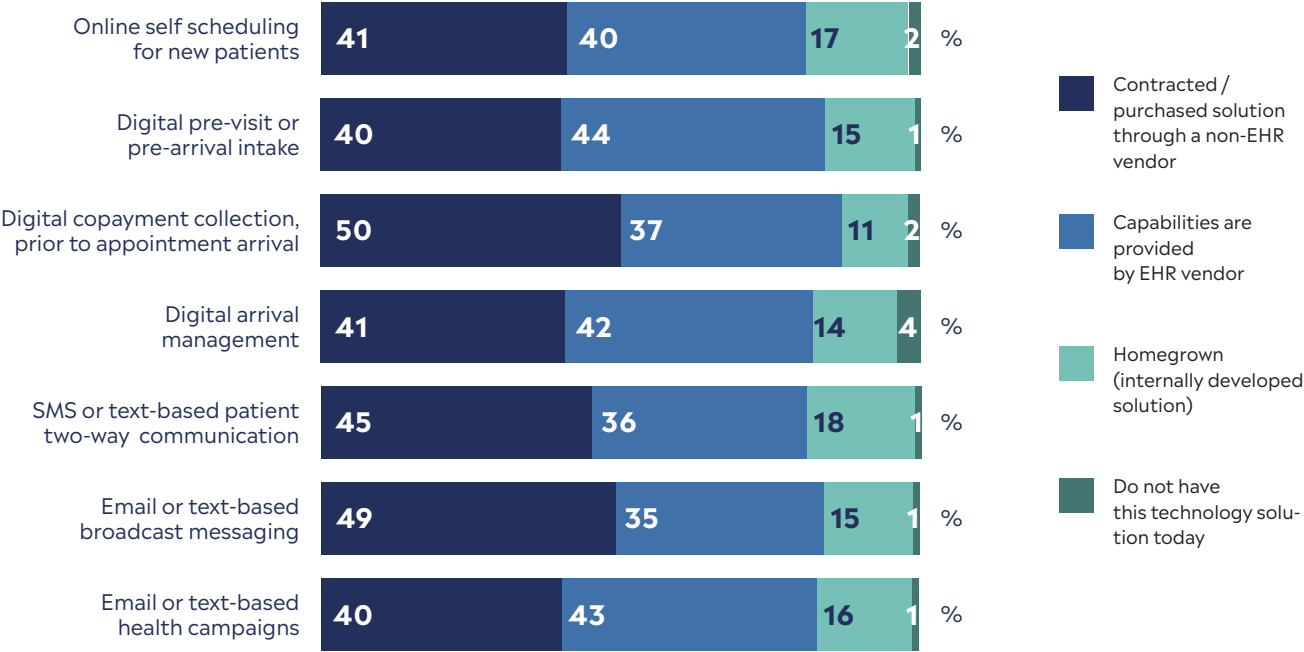
Progress: Digital Adoption Is Near Universal

Gone are the days when referrals and word of mouth were the primary ways that clinicians managed their reputations and acquired new patients—patients today are increasingly moving toward a digital-first approach when searching for and engaging with care.

Digital patient self-service tools are now the standard among provider organizations: 100% of those surveyed use digital solutions for at least five major **patient-facing workflows**, with 92% managing all patient-facing workflows digitally.¹ Commonly digitized activities include online self scheduling (98%), patient intake (99%), pre-arrival payment (98%), and arrival management (96%).

ADOPTION OF DIGITAL TOOLS FOR PATIENT-FACING WORKFLOWS

What type of technology solution do you use for each of the following?



¹ All patient-facing workflows included in the survey.



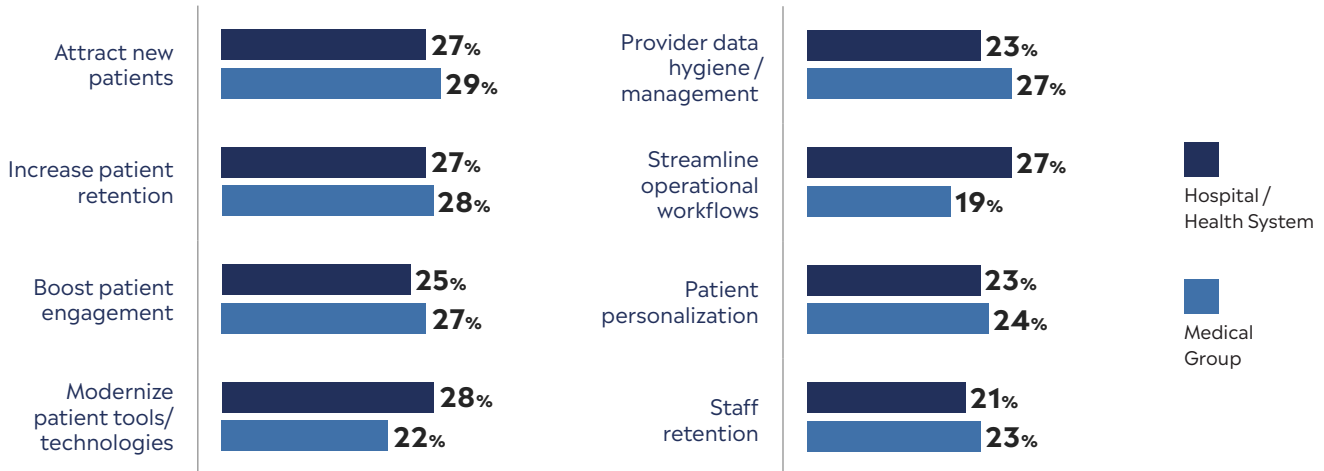
Progress: Digital Channels Help Organizations Meet Their Top Priorities

Growth through **new patient acquisition** remains at the top of the to-do list for medical groups and health systems (28% cite it as a top two priority), with patient retention (27%) and patient engagement (26%) following closely behind.

Organizations lean heavily on digital tools to address their top priorities. In fact, the most successful channels for new patient acquisition are digital, with 41% of organizations (and 56% of small medical groups) successfully using **social media** for this purpose.

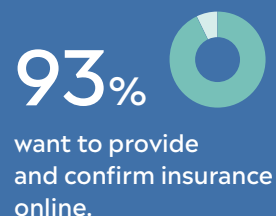
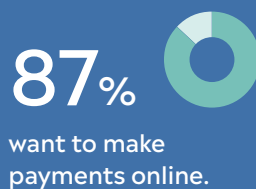
ORGANIZATIONAL PRIORITIES

What are the top two priorities for your organization? Please select 2 responses.



Patients Increasingly Want to Self-Serve

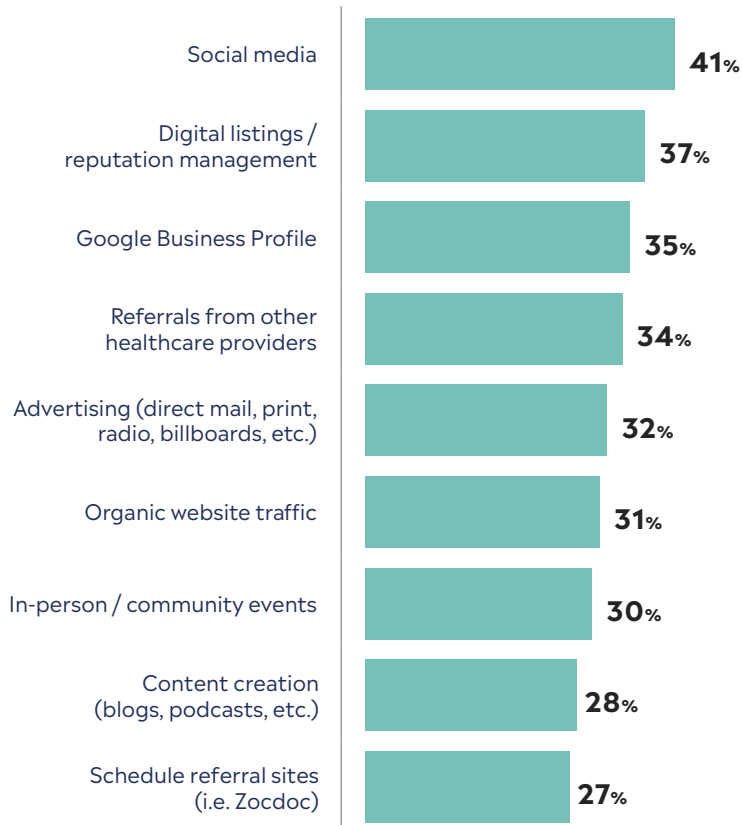
Recent research² shows that 70% of all patients consulted online resources or tools (such as search engines, health plans' online directories, and healthcare organizations' websites) when they last searched for a new healthcare provider, service, or care location. Patients overwhelmingly prefer digital self-service methods for many of the administrative tasks related to care access:



² <https://kyruushealth.com/resource/2024-care-access-benchmark-report-for-healthcare-organizations/>

MOST SUCCESSFUL APPROACHES FOR ATTRACTING NEW PATIENTS

To attract NEW patients, what are the top three most successful approaches for your organization?



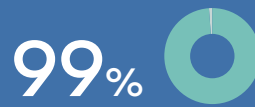
When it comes to engaging the patients they serve, **digital communication has become a mainstay** for healthcare organizations:



99% use two-way SMS/text-based communication.



99% use email or text-based broadcast messaging.



99% use email or text-based health campaigns.



Opportunity: Arrival Workflows Detract From the Patient Experience

High adoption of digital technology alone does not ensure a positive patient experience; antiquated technology or ineffective implementation can disrupt the patient journey. While most organizations have a **digital arrival management** solution in place, 86% feel these workflows **negatively affect the patient experience**.

Organizations leveraging a purpose-built arrival management solution from a vendor are nearly 50% more likely to report a **favorable patient experience** than those with a solution provided by their EHR—and almost seven times more likely to report a favorable experience than those with a solution built internally.

CURRENT ARRIVAL WORKFLOWS' IMPACT ON PATIENT SATISFACTION

How strongly do you agree or disagree with the following statement: My organization's current patient arrival workflows (i.e. the tasks between when a patient enters the practice and before seeing their provider) have a *negative* impact on patient satisfaction.



ACTION PLAN: USE A SOLUTION THAT IS OPTIMIZED TO ENHANCE THE PATIENT EXPERIENCE

By leveraging technology to enhance the patient experience, organizations can increase patient engagement and loyalty: when patients are satisfied, they are more likely to return and recommend the facility to others. Patient arrival workflow solutions in particular play a critical role in enabling a positive experience, as they can streamline the check-in process for patients and staff—and minimize wait times. Organizations should seek out a purpose-built arrival management solution with features designed to smooth the patient journey while reducing manual work for staff—for example by having patients verify (rather than re-enter) data or upload insurance instead of giving it to front office staff to enter.

Maximizing Staff Efficiency in the Digital Age



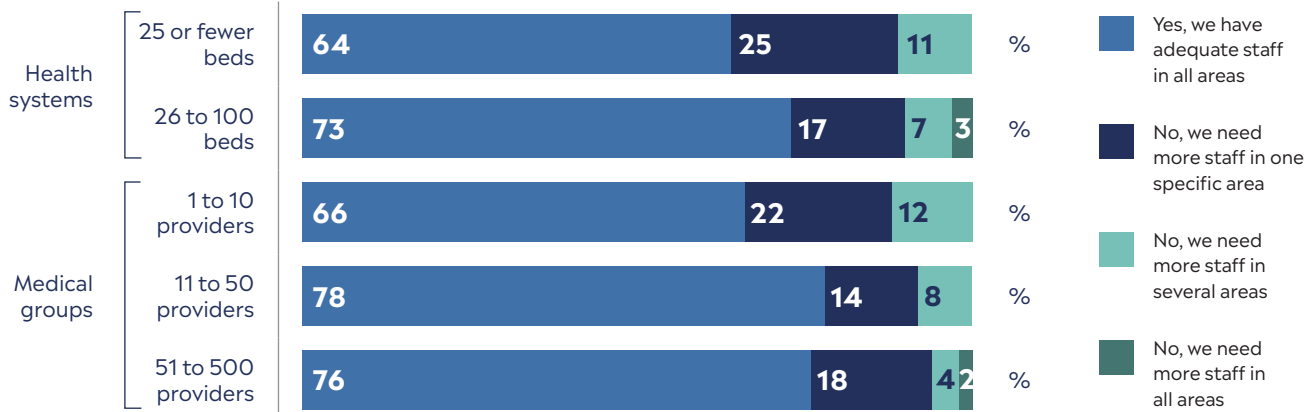
Progress: The Front Office Is Rebounding From Staffing Shortages

Digital solutions aren't just for improving the patient experience—they are also an important way to reduce the tedious manual tasks required of administrative staff, freeing up capacity to address more complex work.

Despite staffing shortages that were heightened by the COVID-19 pandemic, most organizations surveyed have rebounded. They feel sufficiently staffed when it comes to administrative and front-office staffing, though small hospitals and medical groups are more likely to feel understaffed than their larger counterparts.

SENTIMENT ON ADMINISTRATIVE/FRONT OFFICE STAFFING

Based on your current workload, do you feel you have the appropriate number of staff for the patient management workflow you are managing? Choose the statement that most aligns.



When it comes to administrative and front-office staffing:

71% of provider organizations feel that they are sufficiently staffed, with only 9% needing additional staff in two or more specific areas.

Small hospitals (25 or fewer beds) are 33% more likely to feel understaffed than hospitals with 26 to 100 beds, and 36% of them report needing more staff in at least one area.

Small medical groups (ten or fewer providers) are almost 50% more likely to feel understaffed than those with 11+ providers, and 34% report needing more staff in at least one area.

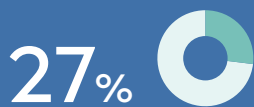
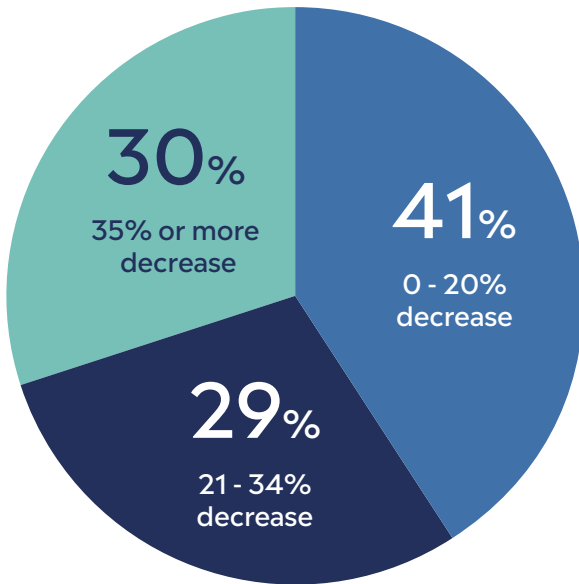


Progress: The Move to Digital Offers Some Improvements in Efficiency

Organizations have achieved early successes as they've progressed in their digital transformation journeys. Many are leveraging digital self-service tools like online patient self scheduling and digital patient intake with some measure of success, underscoring the power of digital tools to drive operational efficiency.

TIME SAVED ON PHONE-BASED SCHEDULING

Since implementing patient online self scheduling, what percentage decrease have you seen in the amount of time staff spend on phone-based scheduling? Your best estimate is fine.



Average time reduction on phone-based appointment scheduling after implementing online self scheduling.



have reduced the amount of time spent on phone scheduling by at least 30%.



have seen at least some positive impact on efficiency as a result of implementing digital patient intake workflows.

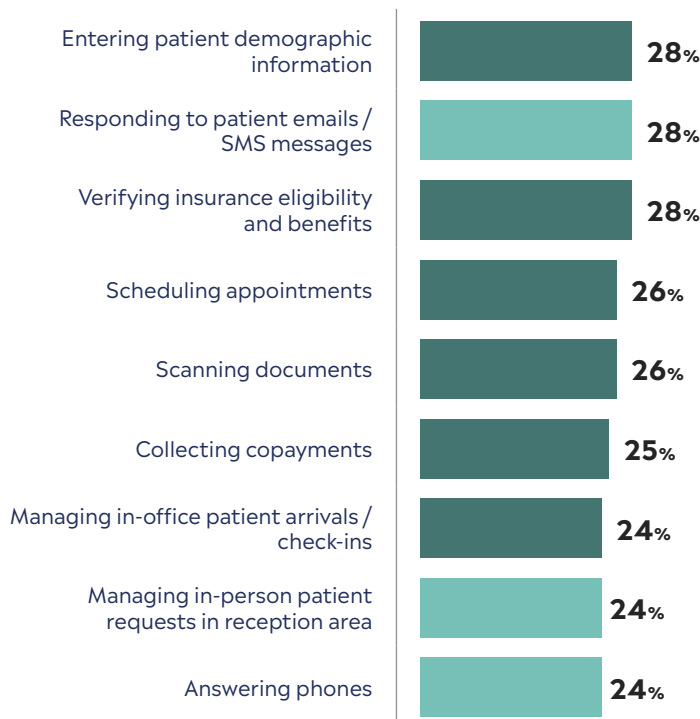


Opportunity: Despite Digitization, Time-Consuming Manual Processes Persist

Although self-service tools have been widely adopted, repetitive tasks continue to place a significant burden on administrative staff. Work remains highly manual, with administrative staff spending a significant amount of time on work that could be taken off their plates—**six of the top seven most time-consuming tasks could be automated**, representing a significant opportunity for optimization.

MOST TIME CONSUMING WORKFLOW TASKS FOR STAFF

What patient management workflow tasks are MOST time consuming for staff? Select all that apply.



■ tasks that can be automated

■ tasks that cannot be automated



6 of the top 7

most time-consuming tasks for front office staff could be automated.

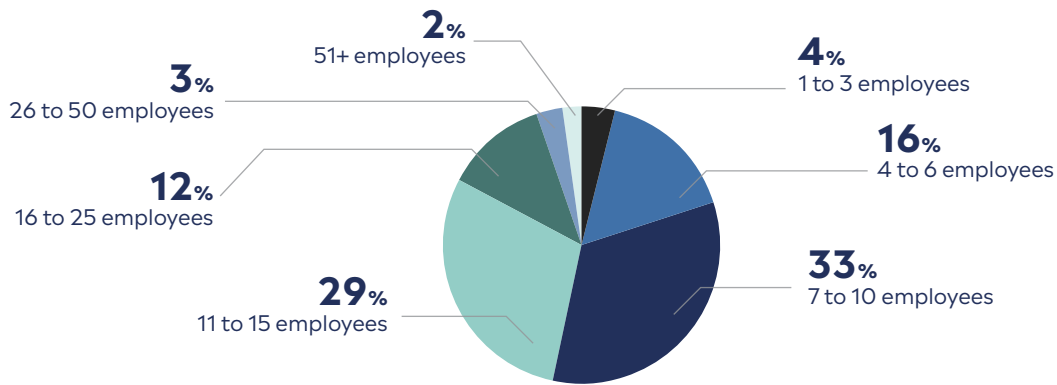
Tools on their own aren't enough; in fact, leaders report mixed results on the impact of digital tools for patient self-scheduling and pre-visit patient intake.

While 99% use some kind of digital patient intake solution and almost all say that there has been a positive impact on efficiency, only 27% say that impact has been significant.

Despite 98% using an online self-scheduling solution (for new and existing patients) and experiencing an average of 27% reduction in staff time spent on phone-based scheduling, nearly 80% of organizations surveyed have **seven or more staff** directly responsible for scheduling via phone. On average, these staff spend nearly 40% of their time scheduling appointments, suggesting that there's room for improvement in optimizing staffing models in addition to leveraging patient self-scheduling.

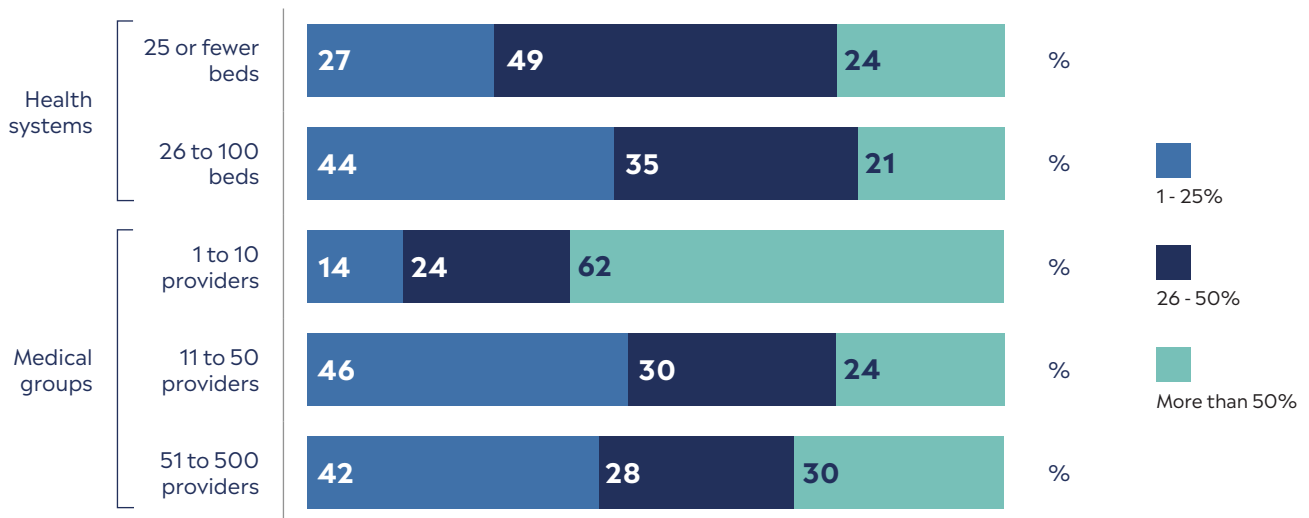
ADMINISTRATIVE STAFF ALLOCATION TO APPOINTMENT SCHEDULING ON THE PHONE

How many staff members are directly responsible for appointment scheduling via the phone, as part of their primary job responsibility?



ADMINISTRATIVE STAFF HOURS SPENT ON PHONE

Among those whose primary responsibility is appointment scheduling, what percentage of staff time is spent on the phone scheduling appointments each day? Your best estimate is fine.



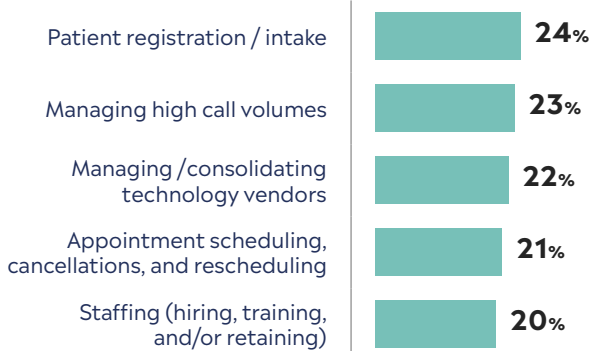


Opportunity: Digital Workflows Are Not Fully Optimized to Drive Efficiency

Three of the top four administrative challenges—patient registration/intake, managing high call volumes, and appointment scheduling, cancellations, and rescheduling—are tied to **patient-facing workflows**. Only half (52%) of medical groups and health systems strongly agree that their patient-facing workflows are optimized and working well. Managing a large number of vendors appears to negatively affect workflow optimization—organizations with more than 10 vendors were less likely to strongly agree (45%) compared to those with five or fewer vendors (53%).

TOP ADMINISTRATIVE CHALLENGES

What are your top two administrative /operational challenges? Please select 2 responses.



52%

strongly agree that their organizations patient management workflows are optimized and working well.



ACTION PLAN: LEVERAGE DIGITAL SELF SERVICE TO REDUCE MANUAL TASKS

Although most leaders feel that their organization is sufficiently staffed, there is a significant opportunity to enhance operational efficiency. By reworking workflows to better integrate digital self-service tools (and better educating patients on how to use them), organizations can recapture or redirect bandwidth spent on manual, time-consuming tasks. Organizations must prioritize the continual optimization of workflows using technology to stay competitive.

Opportunity in Ongoing Optimization

As medical groups and health systems advance along their digital transformation journeys, they are beginning to realize the benefits of automation and self service. But while progress has been made, significant opportunity remains for organizations to optimize their patient-facing workflows and digital tools. Many believe that their patients are dissatisfied with the current state, and they are likely spending significant time and resources managing disparate patient experiences across multiple tools and vendors.

To position their organizations to stay competitive in this dynamic market, leaders must make the most of the opportunity afforded by digital. The winners will leverage comprehensive solutions to streamline their workflows, focusing on building a seamless patient experience, improving satisfaction, and driving efficiency.

For more insights on acquiring and engaging patients, delivering optimal patient experiences, and driving operational efficiencies—including white papers, guides, and case studies—visit the Kyrus Health Resource Library at KyrusHealth.com/resources.

