



How to Grow Your Practice and Create a Superior Patient Experience

Taking a technology-based, patient-centered approach can boost your collections rate, patient experience and improve healthcare delivery outcomes.



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Introduction



As with all service-based industries, customers want to feel listened to, appreciated and have a say in the services they are purchasing. They want to feel as though you value their time and money and expect to be your number one priority. Creating the ultimate customer experience is what keeps a company in business for the long run. And the healthcare industry is no different. Patients are consumers just like other industries, especially with the increase in patients enrolling in high-deductible plans, which are increasing in cost every year.

Since patients are paying more of their own healthcare costs, they are more discerning in selecting a provider and practice. By becoming more savvy healthcare consumers, they expect more from a practice such as increased scheduling flexibility, appointment convenience, and more secure options to pay their bill. The practices that can deliver on patient expectations are poised for a strong future and greater patient retention and [satisfaction](#) (1).

In 2018, the Medical Group Management Association (MGMA) co-partnered a survey given to a group of healthcare leaders who had implemented patient-focused technology in the last 5 years. The researchers found that to truly prioritize the patient, and deliver a more consumer-friendly and personalized experience, a practice must look at the entire patient journey — from checking in for an appointment, partaking in the clinical encounter to bill payment at the point of service.

The survey results were shared in [MGMA's Research & Analysis Report: Optimization of Healthcare Technology to Improve Patient Engagement](#). According to President and Chief Executive Officer of MGMA, Halee Fischer-Wright, “the use of technology is more instrumental than ever in helping providers enhance operations and overall patient care. Building a data platform utilizing technologies, like patient portals, automated appointment reminder systems and digital payment options, helps practices improve patient engagement and allows providers to focus on what they do best — care for people.”

A Patient-Centric Approach

Taking a patient-centric approach in your practice means going beyond thinking of your patient's best interests and considering their preferences for scheduling appointments and paying their bill, to name a few. Taking this approach includes everything from the type of technology your practice invests in, the way in which you train your staff—and most importantly, the way you partner with



each patient to achieve the best health outcomes. This end-to-end, patient-centric approach is the future of healthcare, which is why the need for patient engagement is important now more than ever!

To be successful in a highly competitive marketplace, practices need to think big picture – taking a holistic view of what your patients experiences at every touchpoint of your practice along the way.

At Kareo, we believe patient engagement is essential to a successful and profitable independent healthcare practice. Our mission for this guide is to share the areas where you can enhance your patient's experience using technology and how it helps to build and maintain a positive relationship, improving care outcomes and patient collections. Research has shown that practices that focus on improving engagement with their patients help encourage positive behaviors such as not missing their appointments, feeling more accountable to their treatment plans, being more proactive in their overall health, remaining loyal customers as well and sharing their positive experiences with others through reviews and personal referrals. These, in turn, generate more business for your practice and happier, healthier patients.

Having the right optimized, end-to-end technology is the key to making this happen, which equates to a more efficient office workflow for you and your staff and a better experience for your patients. Now, let's get started.





FIRST IMPRESSIONS MATTER

1. Practice Website and Online Reviews

To help articulate the nuances of the patient experience, we will follow the journey of an average patient looking for healthcare. Let's start at the beginning – **searching for a new provider**. Most patients will begin their search online. What will they find when they come upon your practice and how might it affect their decision to contact you? Does your practice give off a favorable impression online via stellar patient reviews? Negative impression? No impression at all?

Next step is looking at your **website**. Do you even have one? When was it last updated? Is it easy to navigate and visually appealing? Think of it as your digital business card. Patients often perceive a website as an extension of a practice. If the site is outdated and not user-friendly, patients may assume the quality of care they'll receive is also subpar. Your website should be used as a launchpad for a positive patient experience.

94% of patients use online reviews to evaluate physicians

What else can a patient find out about you? An internet search will likely yield a whole host of **third-party rating sites** (e.g., Google Reviews, Healthgrades, Vitals, WebMD, and Yelp), which may be the only sites a patient sees. This happens either because your practice doesn't have its own website or because the website isn't optimized for search engines, meaning it doesn't show up prominently in search results. With the help of technology, you don't have to spend as much time ensuring your practice information is correct. For example, patient engagement software can help you claim your business profiles and update your contact information. This technology automatically syncs your correct location data on dozens of healthcare sites, search engines, mobile apps, ad platforms, and more.

When it comes to online reviews, what do your reviews say about your practice? According to a recent [survey](#) (2), 94% of patients use online reviews to evaluate physicians, and almost three quarters (72%) of patients use these same reviews as the very first step in finding a new physician. This means that your online reputation counts more than you know.

For a little help with online reviews, here are some quick tips:

- ✓ Address positive patient reviews by thanking patients for their feedback and loyalty to your practice. This will encourage them to keep the glowing reviews coming.
- ✓ For negative reviews, ask the individual to call the practice directly to address their concerns. You can also respond publicly by explaining changes you've made to the practice that specifically addresses the issue, if applicable. The key is engage your patients! They want to be heard and addressing a negative review directly will often result in a disgruntled patient rescinding a negative review.
- ✓ You can harness the power of positive reviews by sharing the reviews on your own website or propagating them through your practice's social media accounts.
- ✓ To help with marketing your practice, ask patients to submit a review online or use a program that solicits a review via text or email upon the completion of their appointment. Timing is everything so make sure you follow best-practices by requesting a review immediately while their positive experience is still fresh in their minds.

2. Social Media

We know how busy you are in your practice and being active on social media platforms is probably low on your priority list - if at all. But remember, social media can no longer be considered an afterthought because you better believe your competitors are using it to promote their practices! According to a [PricewaterhouseCoopers report](#) (3), 41% of patients said that social media content impacted their choice of practice or physician. Now that you see the importance in increasing patient engagement by using social media, here are some tips:

- ✓ The most popular social media platforms where your patients are most likely active include Facebook, Instagram and LinkedIn.
- ✓ Consider assigning this task to a social media-savvy staff member, college student or part time employee for a few hours a week.
- ✓ As with your website, your social media accounts should also include your correct bio, address, office hours, and contact information.



- ✓ Make sure your content is helpful and relevant to your patients. It's about adding value to their lives. Share relevant articles as well as keep patients updated on new developments at the practice such as adding new physicians, services, the latest treatment news applicable to your specialty and more.
- ✓ Commit to providing regular content to stay at the forefront of your patients' minds.
- ✓ For additional help, check out Kareo's guide to managing your practice's online reputation [here](#).

How can Kareo help?

Patients are the lifeblood of your practice. To thrive in today's patient-centered market, you need a holistic approach to how you deliver patient experience alongside patient care. Kareo Engage helps you manage your reputation by creating a superior end-to-end patient experience, getting found online, communicating with patients, appointment reminders, sending patient surveys to garner stellar patient reviews and increase SEO traffic to your practice's home page.

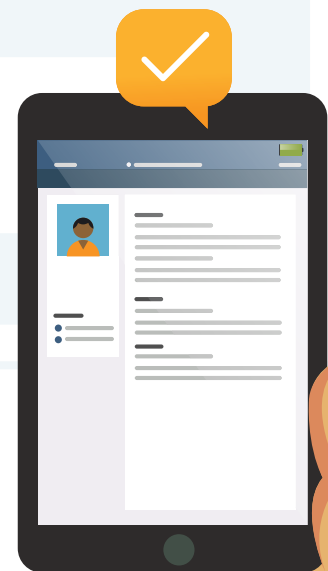
Kareo also includes an Online Directory Manager (ODM), which syncs your current location data on dozens of healthcare sites, search engines, ad platforms and on your own website and ensures your information is correct and up-to-date.

The result is better care delivery, increased collections and happier, healthier patients. For more information on Kareo's ODM and other patient engagement services, [click here](#).



[Learn More About Kareo Engage](#)

Grow your practice and create a superior patient experience





BEFORE THE VISIT

3. Online Scheduling

The next step to ensure a positive experience for a new patient is during the scheduling process. Improve their experience by adhering to these two helpful offerings:

Offer the option to schedule appointments online

Wouldn't it be better if the patient could book their appointment online when and where it was convenient for them and not have to take time away from the front office staff to make their appointment?

Patients increasingly demand the convenience of online scheduling that they see in a variety of non-healthcare industries. Online scheduling is one of the most popular tools used by forward-thinking healthcare providers in this current day and age.

In fact, 76% of participants in a recent study said they want the ability to book, change, or cancel appointments online. An added bonus is that when patients can schedule their own appointments, front office staff can spend less time answering phones to accomplish the same task and focus on generating more business for your practice and managing your financial bottom line

Offer extended hours

People don't only get sick during regular business hours. Having extended weekday hours on one or more days a week and/or a few Saturday appointments a month helps patients tremendously. With urgent care centers and retail clinics on the rise, practices that don't adapt their schedules to cater to patients' busy lifestyles may find themselves with fewer patients.




With the help of technology, having an online scheduling option presents an ideal opportunity to enhance the patient experience. By focusing on convenience, access, and preferred methods of communication for scheduling-related tasks, you'll prove to patients that you respect their busy lives and want to remove administrative burdens.

Online patient intake

Patients know the drill. On their first visit to a new practice, most patients receive a clipboard full of cumbersome intake forms, only to stop filling them out when the pen runs dry. They head back to the front desk and must wait for the office person to get off the phone. The patient finally gets another pen and proceeds to fill out a handful of forms quickly before their hand starts to cramp and their name is called. Many patients end up skipping entire sections because they can't recall certain information, or simply don't have enough time to jot everything down. This is not what anyone would describe as a "stellar" experience for the patient or front office staff. Now couple this with a real medical emergency, such as a patient being under physical and mental duress, and you can kiss that completed intake form goodbye!

However, compare that scenario to a practice that uses technology to help with this process.

Here are three examples:

-  **Patient kiosk.** By simply using your practice's iOS or Android-based mobile device, Kareo Patient Kiosk eliminates the need for in-office paper intake and allows patients to digitally enter their historical information, fill out intake forms and update basic demographic fields in an electronic format.
-  **Online patient intake.** With this solution, you can leave the clutter and confusion of paper forms behind. Delight your front office staff and patients by removing manual and redundant steps from your patient intake process. The practice emails the documents ahead of the visit and the patient completes the information (such as demographics, insurance coverage, emergency contacts, and pharmacy and referral source) on their own time and at their location. Most importantly, your practice will get faster reimbursements with less effort because you can check eligibility and reduce claim rejections and denials that slow down reimbursements.
-  **Digital patient consent forms.** You will want to choose an EHR that includes a consent form, like the one Kareo offers. An online consent form outlines the purpose, benefits and risk of a procedure so the patient can make an informed and voluntary decision. By sending and receiving this form digitally, there is no scanning, filing or searching for the document. It automatically shows up on the patient chart when the chart is completed. It also asks for the patient's signature and date, confirming their agreement with the terms of the practice. You can customize the consent forms, just like the intake forms, to work best for your specialty and clinical workflow of your practice or mental health clinic.

Lastly, consider adding an open-ended question at the end of your intake form. It can say something like, 'Is there anything else you want us to know today?' Although most patients will probably leave this blank, some won't—and the information they provide can be extremely helpful for your staff. Taking steps to streamline the paperwork says to your patients that you appreciate their time and can help in improving patient satisfaction. The result is a more accurate and quicker patient check in process, with the only thing a patient having to do is relax and read a magazine until their name is called.



4. Appointment Reminders

Did you know that 90% of cell phone users ignore calls and rarely check voicemail? However, people respond to text messages in about 90 seconds and check email 34 times a day on average. What this means is that practices solely relying on phone calls are not reaching patients. Kareo's text, email and phone appointment reminders ensure that patients show up for their appointments.

Once the patient has set up their appointment, technology can lighten the burden of your office staff to ensure the patient keeps the appointment. Non-obtrusive appointment reminders can help reduce costly no-shows as well as ensure on-time arrivals. Patients appreciate when a practice confirms upcoming appointments using their preferred method of communication such as text or email.

You will also want to determine a reminder frequency that works best for each patient. You can obtain this information anecdotally by simply asking when they check out or by including a question in a short satisfaction survey that the patient can fill out after the appointment.

5. Check-In

Now it's time for the new patient to check in for their appointment. As we discussed earlier, you can use mobile technology to streamline the process by offering a self-service kiosk to enter in their information or have them send their papers ahead of time electronically. An outstanding patient experience is about taking every opportunity to show patients how much you value them.

Improving the patient experience is largely connected to improving employee training, with a rigorous training and onboarding program before they're allowed to interact with the public. Make sure front-office staff understands your expectations. Train them not only on formal policies and procedures but also on being empathetic and communicating effectively with patients and listening to their concerns.

Lastly, a few simple actions your front-office staff can do to make a patient's visit an even better one includes greeting each patient by their name and with a smile and thanking them for coming to your practice. It is always a good idea to let your patients know how much you appreciate them on an ongoing basis.

How can Kareo help?

Using an integrated, end-to-end platform like Kareo makes scheduling, intake and checking in to a doctor's appointment a breeze for your patients. [Kareo Engage](#) helps with online scheduling, online patient intake and consent forms, to automated appointment reminders and a patient kiosk. Start saving time and minimize frustrations for your office staff, while improving the patient experience ten-fold!

6. Waiting Room

As the patient enters your waiting area, what will they find? You may not think of your waiting area as particularly important, but it definitely plays a large role in the overall patient experience. In fact, the waiting area may be where patients spend the majority of their time while at your practice, meaning it's ripe with the opportunity to make—and keep—patients happy.

Some ways to improve upon this area includes providing amenities like free Wi-Fi connection, TV and updated magazines. Free coffee, water and/or tea, can be a nice addition. Also, consider arranging chairs in a less compacted manner, which is especially appreciated during the COVID-19 crisis. Lastly, adding plants, positive artwork such as landscapes and waterfalls, and even a fish tank can provide a serene and relaxing environment for your valued patients.

Wait Times

Everyone leads busy lives, and nobody likes to waste time waiting. But the reality is that sometimes situations come up that take up more time than scheduled such as a patient taking longer to treat, or the schedule gets double booked due to seasonal illnesses. The good news is technology can help. For example, if your patient engagement solution has a text feature, your staff can send text updates to let patients know ahead of time when a provider is running behind.

If the patient is unable to accommodate the shift in schedule, they can go online and schedule another appointment. As mentioned earlier, a patient check-in kiosk can also help reduce wait times by streamlining the check-in process. A kiosk gives patients the ability to update their information, confirm their eligibility, and provide a credit card on file or update an existing card number. And guess what? Practices love the ability to capture a patient's payment information up front because it allows them to store it for future use and utilize in the event of patient no-shows.



DURING THE VISIT CLINICAL CARE

7. In the Exam Room

Improving the patient experience at this point in the journey is all about going the extra mile to reduce stress and give each patient your full attention. The Council of Accountable Physician Practices (CAPP) said in a [2017 report](#) that patient-provider interactions are the most important aspect of quality care. CAPP conducted a national survey of healthcare consumers and providers on their expectations of a healthcare visit and found that patients want a provider that is a good listener, understands their needs, and has the ability to take complex information and break it down to a level they can understand.

The researchers pointed out that while bringing technology into the patient-provider relationship may sound counter-productive to creating a better patient interaction, it helps because technology automates certain processes to save time. The provider can then use that extra time to truly focus on their face-to-face interaction with their patient.



There are ways technology can help you provide an even better experience for your patient while you are both in the exam room. For example, you can use:

- ✓ **Flexible notes section of your EHR.** The right EHR will provide many templates within the flexible notes section to choose from that provide shortcuts and gives you the ability to customize for your specialty. The end result is using a customized template will save time in writing notes.
- ✓ **Assigning someone to be a Scribe.** Having someone help take notes for you can give you more quality time with your patient.
- ✓ **Voice-Activated scribe systems.** Technology such as Dragon speech recognition software helps reduce the amount of time it takes to type everything out. The more quality time you can spend with your patient, versus taking time to write notes, greatly contributes to a positive patient experience.
- ✓ **EHR to engage patients.** Think of your EHR as a tool that can improve patient engagement. For example, flip the EHR monitor so your patient can view visual representations of their data. Explain each action you take using the EHR so they can follow along.
- ✓ **Flowsheets.** An EHR like Kareo Clinical provides flowsheets, which allow providers the ability to review a combination of pertinent patient vitals and lab results in an easily viewable screen. Kareo's flowsheets will effectively allow providers to get a holistic view of their patient's key data over time and allow them to analyze progress.

It's imperative for providers to assess a patient's health progress by reviewing historical clinical data and comparing it with the most recent encounter data. Today, providers have a difficult time evaluating a patient's progress and are required to review and compare lab results individually - a time consuming and tedious task that results in a lot of scrolling and clicking.

Flowsheets will allow providers to easily review a combination of pertinent clinical data in one easy-to-read location. This will effectively allow providers to get a holistic view of the patient's key data over time and allow them to analyze progress.

“

There's no way I have time to write notes by hand. Dictating a note takes at least 20 minutes per patient. With Kareo, I can use smart phrases, and the system inserts complete sentences. I now finish a note quickly, in about one fourth of the time as before, and avoid the cost associated with transcription fees.

—
Dr. Naheed Ali, MD, FHM

Board Certified in Internal Medicine,
Dilshad Concierge Medicine

8. Telehealth

Especially in a post-COVID-19 era, consumers want more convenience in healthcare—the ability to seek care from the comfort of their own home, office, or whatever place they choose. The answer is telehealth. The benefits of this care delivery option includes keeping patients safe from exposure to COVID virus, saving on travel costs and travel-related hassles and is a lifesaver for those with childcare issues.

Offering a telehealth option is important to providing a more positive patient experience. However, it is important to find a telehealth solution that seamlessly integrates with your EHR, such as Kareo Telehealth, which is HIPAA compliant and easy to use. By incorporating a telehealth solution like the one Kareo offers, you can connect with patients anywhere, anytime. It's simple, secure and streamlined, seamlessly integrates with the Kareo platform —and is fully reimbursed by private payers.

Here are some key features [Kareo Telehealth](#) provides:

- ✓ **Increase Staff Efficiency**
Video visits are more efficient than in- person appointments. Spend less time on administrative tasks and more face-to-face with your patients.
- ✓ **Improved Patient Outcomes**
Telehealth helps patients to comply with treatment plans, manage medications, and engage in lifestyle coaching, resulting in better health outcomes.
- ✓ **More Satisfied Patients**
Offer your patients the convenience and accessibility of telehealth. Our clients see 98% patient satisfaction on average for video visits.
- ✓ **Scheduling Flexibility**
Video visits can happen anywhere, anytime. Offer extended hours or even weekend availability without incurring office and staff overhead.
- ✓ **Reduce Patient No-Shows**
Transportation issues, time off from work, and child care are no longer an issue for patients seeking follow-up appointments and convenient care.
- ✓ **Generate Incremental Revenue**
Convert unpaid follow up phone calls or emails to fully reimbursable video telehealth visits.

Whatever telehealth solution you select, remember that you need to know your state laws and medical licenses for treating patients remotely. Medicare and Medicaid reimburse for telehealth services in all 50 states, but the rules vary by state. Thirty-six states and D.C. also have parity policies for private payer coverage. Be sure to select a HIPAA-compliant solution like Kareo Telehealth and remember, Skype and Facetime are not HIPAA compliant.

Lastly, be sure to promote your telehealth services by posting information in your practice lobby, exam rooms, website and on social media. It is a good idea to announce your new service through an email or text – such as using the broadcast feature of your patient engagement solution. It is also best to train staff to suggest virtual visit vs. in office when scheduling appointments or follow ups.

How can Kareo help?

With [Kareo Telehealth](#), you can increase staff efficiency and spend less time on administrative tasks, with no activation or onboarding required. Using Kareo's telehealth solution gives you more satisfied customers, scheduling flexibility, reduction in patient no-shows and additional incremental revenue.



[Learn More About Kareo Telehealth](#)

Make Every Moment Matter with HIPAA-Compliant Video Visits



9. Treatment Plans

For practices that focus on mental and behavioral health, treatment plans are an important tool and highlight key assessment information, define areas of focus and establish concrete goals for treatment. They are classically used by psychiatrists, psychologists, professional counselors, therapists, nursing teams and social workers in most levels of care.

Kareo's latest addition to its growing portfolio of mental health features include digital treatment plans. This addition not only improves overall practice synchronization with patients, but it also supports clinical decision-making, giving providers and their teams the plans that help guide patients towards their goals and assists them in monitoring progress to adjust the treatment plans as necessary. The best part is that it's modular – add as many goals, objectives and interventions that you want – hand in hand alongside your patient.

Being included in the development of a customized treatment specifically for themselves allows patients to have a voice in the goals and objectives that outline each step of their program. Oftentimes, simply being a part of a process makes people more likely to adhere to objectives that satisfy a goal and are more likely to stay on track. This is similar to working alongside a motivating personal trainer rather than copying a diet program from a manual. That's a win-win for the practice and the patient. Additionally, practices are more likely to see reimbursement from insurance providers in some cases, as treatment plans show proof that treatment was provided and that both parties participated in the process via signatures. Some practices actually require treatment plans for reimbursement.

10. Patient Collections and Billing

In the area of patient collections, patients are dealing with more financial and emotional stress than ever before due to:

- ✓ Higher amount of out-of-pocket expenses from choosing high deductible plans.
- ✓ Feeling the financial impact of the COVID-19 crisis due to lost or reduced income.
- ✓ Dealing with more stresses from society's new "normal" caused by COVID-19, such as homeschooling, health fears, loneliness from isolating, etc.

Here is a list of top frustrations patients have with patient collections and what you can do to alleviate it, with the help of technology:

- ✓ **I'm not sure what my insurance covers.** Your practice can dramatically reduce the number of rejected claims from non-eligibility. With a [practice management system](#) like Kareo offers, you have easy eligibility checks, re-checks, automated checks and group checks at your fingertips, so you can do multiple verification to ensure claims go through clean and easily.
- ✓ **Too many errors on my patient statement.** Whether the error is due to coding, pricing or something else, patients get upset when their health care bill is incorrect, which causes them to ignore future statements. Utilizing a practice management system can ensure that the health claims your practice submits to payors are clean and can be paid immediately upon submission. More details provided in the next section.
- ✓ **I've been so busy, I forgot to pay my balance.** Better communication is the key to better collections. Technology can make it easier to stay in closer contact with patients throughout the collections process by offering the ability for two-way communication through text or email, group broadcast and more. You can send automatic direct messages(via text or email) to single or multiple accounts at one time - such as communicating a link to their patient statement or reminder of what is due for the month.
- ✓ **My invoice is confusing.** Research shows that patients are often confused by their health care bills, which makes them skeptical about making a payment. Mailing easy-to-understand patient statements helps your practice to get paid quicker. Refer to the next section on what to look for in sending an effective patient statement.
- ✓ **I would like different options to pay my bill.** Does your practice still require cash or checks as the only form of payment? If so, yikes. At a minimum, patients expect the ability to pay with a credit card, and most consumers also assume they can pay their healthcare bill online. This isn't an unrealistic expectation. It's a convenience to which they're accustomed in most other non-healthcare industries. Choosing a credit card swiper machine gives you a secure method to collect payments. Online bill-pay is another option that can boost patient satisfaction because it's quick and easy. Simply provide a link on the paper or electronic invoice that directs the patient to the practice's portal or other secure website specifically for online bill pay.

For more information on patient-friendly billing, click [here](#). (4)

By using Kareo's [Credit Card Swiper](#), you can provide patients the option to use their credit card to pay their bill. Kareo offers a reliable and easy-to-use swiper technology that gives practices (or health clinics) like yours the ability to process patients more efficiently, while improving overall patient collections. Here are some advantages to using this type of payment technology:

- Some billing solutions, like Kareo, offer seamless integration of the swiper with your regular billing workflow.
- Shorten your revenue cycle with just a click and a swipe to post a payment and record transactions immediately.
- Store credit cards on file and easily capture patient balances for future visits.
- Take payments in any location and easily take payments in person, over the phone and online.



Billings

The connection between the revenue cycle and the patient experience may not be obvious. However, there's certainly a link between the two. Fundamentally, if you don't do your part to collect accurate information and submit accurate claims, patients could receive a bill they're not expecting. This makes you less trustworthy, and it frustrates patients who then need to spend time following up with their insurance company to rectify the problem. A practice management system can help you improve your billing accuracy by:

- ✓ Conducting regular audits to identify problem areas before they get out of hand.
- ✓ Scrubbing claims before they go out the door to prevent denials on the front end.
- ✓ Providing an Accurate Charge Capture & Management function letting you view and enter charges directly in Kareo and never miss another charge.
- ✓ Deploying smarter insurance billing and patient collections ensure you get paid with advanced claim processing, tracking tools and features designed to help you stay on top of your patient A/R.
- ✓ Utilizing billing analytics helps you better understand your billing performance and avoid surprises.
- ✓ Getting complete visibility at a glance by showing you outstanding items that need your attention for the day through an intuitive agenda overview.

Lastly, it also helps to invest in front-end training, so your staff collects accurate demographic and insurance information—and verify that information at every visit. Instead of asking if anything has changed, have your front office staff take the time to go through the information data field by data field. It only adds a few additional seconds to the check-in process, but it makes a huge difference in terms of reducing denials.



AFTER THE VISIT

11. Patient Statements and Reminders

The invoice presents yet another opportunity to enhance the patient experience. Create a patient-friendly invoice with these seven elements:

- ✓ Itemized breakdown of services for each date of service, including what the insurance paid vs. what the patient owes.
- ✓ Total amount due and payment method options.
- ✓ Clear instructions on how to pay the bill.
- ✓ Information that explains the difference between a bill, a statement, and an Explanation of Benefits.
- ✓ Additional resources (e.g., billing and customer service numbers as well as Medicare and Medicaid websites).
- ✓ Contact information for local patient advocates.
- ✓ Statement envelopes that include a ‘forwarding and address corrected requested’ message next to the return address.

Convenient payment options

Think about the non-healthcare invoices you’ve paid promptly versus the ones you’ve set aside because you don’t understand them. Nobody wants to be told they owe a lump sum of money without any context. If you want patients to pay—and pay promptly—you need to assess the quality of your invoices. With the right technology, you can future proof your patient collections. [Kareo Patient Statements](#), for example, helps you to spend less time billing, while increasing patient collections and enhancing your patient experience. Our patient statements solution gives you the ability to automate the delivery of statements, batch process patient statements with a few mouse clicks and configure your custom instructional messages.

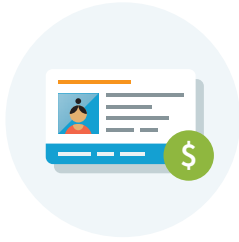


How can Kareo help?

For an all-in-one, turn-key solution, consider [Kareo Patient Collect](#) to simplify patient collections and maximize patient balance resolution. As consumer payment responsibility continues to increase, providers are tasked with collecting higher balances more frequently from their patients. The need to reach patients in a clear and convenient way, while providing various payment options, has become paramount.

When you implement a solution like Kareo Patient Collect, it takes the headache out of patient collections by clearly communicating outstanding balances to patients at the right time, and on the right device. Now you can get your practice to collect more, faster.

Key Features of Kareo Patient Collect include:



Patient Payments

With Kareo Patient Collect, we make it more convenient for your patients to make healthcare payments by providing the flexibility to collect payments and remove unnecessary complexity. Patients will be able to easily process payments quickly and securely over the phone or online.



Patient Statements

Kareo has proven success in helping practices reduce administrative costs, save time and collect more money in less time with our customizable patient statements. You get email, text, and mailing options to send patient statements and can send them individually or in batch statements.



Unlimited Text Messaging

Kareo's actionable SMS text statements ensure patients receive alerts regarding outstanding balances long before they receive a paper statement, while their visit is still top of mind.



Delivery Reporting

Leverage Kareo Patient Collect's delivery reporting dashboard to confirm the delivery of text, email and mailed statements. It also identifies invalid email addresses, as well as outdated or incorrect telephone numbers for updating.

12. Patient Collections and Billing

Patients are increasingly becoming more active in their healthcare, and they want to be informed of the latest and greatest treatments and procedures. Here are some ways technology can help you with providing important health information to your clients:

- ✓ **EHRs.** Patient education materials are automatically included in EHRs that have been certified using Meaningful Use stage 2 criteria. This means when physicians enter a diagnosis in the EHR, it automatically maps to relevant educational material that physicians can print or send to the

patient's portal. Patient education materials can be related to diagnosis, medications and sometimes immunizations/vaccines.

- ✔ **Broadcast messages.** With a patient engagement solution, you can send a text or email message to your entire patient base or a specific group within your base at one time. An example of this is sending out a message of upcoming national observances to remind them to schedule their annual exams or immunizations or notifying your patients that you are now offering telehealth services.
- ✔ **Patient surveys.** You can use the patient survey function of your engagement solution to find out what health topics your patient base is concerned most about and then use the newsletter function to include those topics in upcoming newsletters. This saves time for you and your staff, reducing the time to explain the same information to several patients.

For patient communications, you can't beat having a [portal](#) (4) for providing important health information to patients. After your patient leaves the practice, they may turn to the portal for continued communication (e.g., to ask a clinical question, access a lab result, or check an appointment time). Patients can access the portal 24/7, from anywhere and on their own time schedule. A patient portal often can circumvent the need for your patients to call the practice (and wait on hold) or go there in person.

It is important that you select an EHR that provides a patient portal, and be sure to work with your vendor to ensure that patients can use it to perform these self-service tasks:

- ✔ Review their complete health records and immunization history.
- ✔ Access lab results and after-visit summaries.
- ✔ Ask for prescription refills and referrals to specialists.
- ✔ Complete new patient questionnaires.
- ✔ Pay bills (if you have purchased an integrated platform that includes a billing function).
- ✔ Schedule, reschedule, and verify appointments.
- ✔ Send secure messages. (Note: The closer the communication is to real time, the more it feels as though the clinician is accessible to patients, which improves their overall experience).

If your practice doesn't offer a portal, you're missing out on a big opportunity to enhance the patient experience. Patient portals give patients access to their health information when and where it's convenient for them.[5]

13. Outreach

Staying in touch with your patients is one of many ways you can show that you care and improve the patient experience. But as with any busy practice, finding time to do so is usually why it falls to the bottom of the priority list. With a little help from technology, you can reach out to your patients more easily, which serves as good reminders for them to follow their treatment plans, get their annual health exams, and recommend your practice to friends and family.

When using a patient engagement solution, like the one Kareo offers, here are some opportunities to reach out to patients:

- ✓ **Kareo Rx Saver.** Powered by GoodRx, Kareo Rx Saver gives you the option to offer your patients information on the best prescription pricing available in the area as well any coupons for their medication, all directly from the Kareo Clinical workflow. You may email, text or print the discount and deliver the coupon via web and mobile to lower patient prescription medication costs.
- ✓ **E-prescribing.** This feature saves you time and eliminates phone calls for you and your staff with electronic prescribing. Saves your patients money too!
- ✓ **Preventive care reminders.** Seventy percent of consumers will choose a provider who sends reminders via email or text when it's time for preventive or follow-up care. [6]
- ✓ **Patient newsletters.** This doesn't need to be a major time commitment. Kareo's patient engagement solution can help make it easier to send a monthly or quarterly newsletter that can include quick health tips, Q&A, national health observances and practice updates.
- ✓ **Surveys.** Send follow-up surveys within 24-48 hours of a visit, as well as periodically to find out how your practice is doing. Discuss results during team huddles, and then be sure to follow through with the suggestions.
- ✓ **Patient birthdays and holiday greetings.** Let patients know you're thinking of them on their birthday and at the holidays. Birthday emails have been shown to drive more visits to a practice and increase patient satisfaction. Besides, who doesn't like a well-intentioned email on their birthday.

How can Kareo help?

Today's patients are hungry for information and often come to their appointments prepared with questions. With Kareo Engage, you receive a number of features to maximize your communication with your patients, educating them on important health-related information, and keeping them engaged in their personal health progress to – which helps make them more accountable. The [Kareo Engage](#) solution includes a patient portal that just needs the patient's address and we do the rest – inviting them to join and sending out easy instructions for them to follow. You can also send out patient broadcasts, text messages, surveys, and newsletters all with the help of Kareo!



Retail stores stay in touch with their valued customers through promotional emails and coupons, and with a little extra effort, you can do it as well. Patients of Naheed Ali, MD, FHM, Dilshad Concierge Medicine, have appreciated the coupons she sends them using an engagement feature on Kareo's integrated platform. After a doctor visit that includes medication needed, Dr. Ali sends an electronic transfer to a patient's pharmacy, followed up with an automated text message on the patient's phone, notifying them of a discount to their prescription. One of her patients appreciated the gesture so much, she mentioned it as part of her positive review of the practice on Yelp.

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We frequently sent out patient reminders and a large volume of holiday cards by mail. Now, these messages are integrated into our Kareo system, so emails are automatically sent out – for free!

Dr. Scopelliti

Jersey Shore Regional Center

Conclusion

If you want to improve the patient experience at your practice, it's time to make some changes that put patients front and center on your priority list. Look beyond healthcare to see what other consumer-facing industries are doing to move the needle on customer satisfaction. It's all about convenience, expediency, and cost effectiveness. Improving the patient experience also requires big-picture thinking. Radical thinking. The patient experience isn't only about the face-to-face time patients spend with their provider. It starts long before they set foot in your practice, and it continues indefinitely. It encompasses various touchpoints, each of which is an opportunity to show patients that their health matters—and that it matters to you personally.

Why Choose Kareo?

After more than 15 years, Kareo has a proven proficiency in addressing the needs of healthcare and mental health providers and the unique challenges they face. Our all-in-one integrated platform is designed to help you increase your patient volume, reduce patient no shows, offer virtual care, speed up the check-in process and e-prescribe with ease. Moreover, Kareo offers exceptional customer support which includes:

- ✓ Free onboarding, including a dedicated Customer Success Coach.
- ✓ Immediate access to role-based training through Kareo University.
- ✓ No long-term contracts and flexibility to adjust your subscription without penalty.
- ✓ A clear and simple pricing model that offers affordable ways to grow your practice of clinic.
- ✓ Access to our knowledge base where you can find self-help articles, guides, short training tutorials, product releases and more!

We would love to be your technology partner and can help you grow your client base, increase your reimbursements, minimize burnout and improve care delivery, all while helping you to provide the best patient experience! For more information – visit us at [Kareo.com](https://www.kareo.com)

[1] <https://www.accenture.com/us-en/insights/health/todays-consumers-reveal-future-healthcare>

[2] <https://www.softwareadvice.com/resources/how-patients-use-online-reviews/>

[3] <https://www.forbes.com/sites/andrewarnold/2018/11/07/how-social-media-usage-affects-doctor-to-patient-relationships/#28245b415d3c>

[4] <https://www.hfma.org/content/dam/hfma/document/article/PDF/5556.pdf>

[5] <https://www.healthit.gov/playbook/pe/chapter-2/>

[6] <https://www.accenture.com/us-en/insights/health/todays-consumers-reveal-future-healthcare>



The only complete technology platform for your independent practice

Kareo offers the only cloud-based, clinical and business management technology platform dedicated to serving the unique needs of independent practices. Our software helps you find and engage with patients, run a smarter business, provide better care, and get paid faster. More than 75,000 healthcare providers rely on Kareo with nearly 150,000 users logging in to our software every day.

Visit www.kareo.com to learn about the integrated software platform for patient collection success.



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