

WOLL™

# Optimizing Revenue In Uncertain Times





## Overview

In February 2021, the American Hospital Association (AHA) released sobering statistics compiled from an analysis by Kaufman, Hall & Associates, LLC about revenue losses the healthcare industry can expect in 2021. In a positive economic outcome, hospitals and health systems are on track to lose \$53 billion in revenue while in a downturn, total revenue losses are projected to total \$122 billion.<sup>1</sup>

Attributing to a portion of these losses are patients that delayed care, either out of caution or because their preferred facilities were not open for non-urgent medical needs. Surveys show anywhere between 30-40% of Americans chose to avoid urgent care and forgo appointments such as cancer screenings, routine wellness exams, and chronic condition check-ups.<sup>2</sup> Gaps in care can lead to preventable medical issues often resulting in patients needing secondary or tertiary care, which is more expensive to both the patient and health systems.<sup>3</sup> While the exact cost is unknown, experts are predicting that we will continue to see these economic ripples play out over the next several years.

As the healthcare industry navigates operational and financial recovery post-pandemic, technology and process automation is a big opportunity to drive efficiencies in the revenue recovery cycle. Healthcare leaders agree that the ability to automate repetitive and manual processes is critical to freeing up staff to perform more direct patient care services.<sup>4</sup> Efficiencies such as mobile digital self-service, including patient self-scheduling, intake, and payment, provide patients a more direct and safer consumer experience.

1 [https://www.aha.org/system/files/media/file/2021/02/KH-2021-COVID-Impact-Report\\_FINAL.pdf](https://www.aha.org/system/files/media/file/2021/02/KH-2021-COVID-Impact-Report_FINAL.pdf)

2 <https://www.cdc.gov/mmwr/volumes/69/wr/mm6936a4.htm>

3 <https://www.healthleadersmedia.com/nursing/more-one-third-us-adults-delayed-or-skipped-medical-care-because-pandemic>

4 <https://www.healthitoutcomes.com/doc/health-system-cio-priorities-changes-ahead-due-to-covid-0001>



## Patient Communication Enables Revenue Recovery

WELL™ Health allows healthcare providers to project confidence to their customers during times of uncertainty. As health systems initiate revenue recovery efforts and resume normal operations, patient communication and engagement will initiate success.

WELL™ supports multiple workflows for facilitating patient communication and is uniquely positioned to help health systems recapture lost revenue using four primary drivers: rescheduling, campaigns, broadcast messages, and conversational automations. Each targets a unique set of patients with tailored messaging to help you achieve your objectives.

COVID-19 has presented an entirely new set of challenges and new workflows so reopening will require experimentation and adjustment. WELL enables health systems to be agile and respond to patients in real-time with effective configurations to accommodate the uncertainty.

## Scheduling Backlog of Deferred Appointments

Use tools to keep patients engaged so when they are ready to make appointments, they can easily contact providers. Send Broadcast Messages to specific groups of patients, up to 3,000 at a time per practice, based on set criteria, such as appointment date or appointment type.

Health systems can coordinate both automated and manual patient rescheduling for telehealth and in-person visits through the WELL™ platform.



# 1

## SEND RESCHEDULED APPOINTMENT CONFIRMATIONS

For appointments that were postponed or canceled, proactively schedule new appointment times. Send messages regarding new appointment times to patients and request confirmations. This is the most effective method for recapturing lost appointments because it requires the least effort from patients and staff.

*"Hello {clientFirstNameProperCase}, we know the impact of COVID-19 made it impossible for us to see you for your last appointment. As a courtesy, we've reserved a time for your new appointment on {eventDateAtTime}. Will this work for you?"*

For patients who decline, WELL can launch a self-rescheduling workflow (available through Epic App Orchard) that presents alternate times. This will eliminate the manual workflow of texting or calling the office to reschedule. For clients who do not have self-rescheduling enabled, the patient will be directed to a staff person to schedule the new appointment.

# 2

## INVITE PATIENTS TO RESCHEDULE

If you prefer to allow patients to reschedule their own appointments, send a message to all patients with missed appointments during the previous month inviting them to reschedule:

*"Hello {clientFirstNameProperCase}, we are ready to reschedule your March appointment for June. Please text or call us to find a new date and time."*

*"Hello {clientFirstNameProperCase}, please reschedule your March appointment for June. Please schedule your appointment at {eventSelfScheduleAppt}."*





## Restore Patient Confidence

Send campaigns to your entire patient roster to communicate the current availability of services and remind patients it's time to reschedule postponed or canceled appointments. Messaging can reassure patients about safety protocols and explain virtual waiting rooms process.

### 3

#### EXPLAIN SAFETY PROTOCOLS AND VIRTUAL WAITING ROOMS

Help patients feel safe during in-person visits by screening patients prior to appointments and remind them about safety protocols. **A study found that patients are now accustomed to virtual waiting rooms and want them to continue since patients feel they are more efficient and convenient.**<sup>5</sup> If you have a virtual waiting room, make sure patients can digitally check-in to enable social distancing while patients wait for their appointments.

*"Hello {clientFirstNameProperCase}, upon arriving for your appointment with {eventProviderName} please reply to this TEXT or call us at 555.555.1111 to let us know you have arrived. So that we may safely prepare for your visit, remain in your car and a member of our care team will contact you to let you know we are ready for your visit. If you have MyChart and have not completed e-check-in, please click on this link <https://healthsystem.org/mychart/>."*

# 4

## REDUCE CONTACT USING DIGITAL INTAKE FORMS

Send digital patient registration information, intake forms, and check-in communication to limit exposure risks.

*"Hi {clientFirstNameProperCase}, thank you for scheduling your appt on {eventDateAtTimeShort} with {practiceName}. Please fill out and bring the following documents to your appt: [LINK]"*

*"Hello. This is {practiceName}. Please log in to MyChart to begin your eCheck-in process for {clientFirstName} {clientLastName} on {eventDateAtTimeShort} with {eventProviderName}."*

# 5

## PROVIDE VACCINE EDUCATION

Provide patients with COVID-19 vaccine information in the event they have not yet been vaccinated.

*"We are pleased to inform you that WELL Health Clinic is now offering a COVID-19 vaccine to members of our community according to our state Department of Public Health guidelines. You can learn more about the COVID-19 vaccine at [LINK]. Are you interested in receiving the vaccine? Please Reply 1 for Yes or 2 for No."*

# 6

## REDIRECT PATIENTS TO A NEW LOCATION (IF NECESSARY)

If your office has relocated, send the new address in appointment confirmations and reminders.

*"Hi {clientFirstNameProperCase}, our office has moved to a new location. It is located at [INSERT LOCATION ADDRESS]."*







## Identify Patients with the Greatest Needs

Prioritize patients who have the highest clinical needs to schedule their appointments first.

7

### CLOSE GAPS IN CARE WITH OUTREACH TARGETING CHRONIC CONDITIONS

Send a message to patients with certain chronic conditions to resume continuity of care.

*"Hello {clientFirstNameProperCase}, we understand the challenge of managing diabetes during this time. Our primary care department is now seeing patients. Please schedule an appointment with your doctor to review your care plan, receive an eye exam, and schedule labs. To schedule an appointment, reply to this message."*



# 8

## UNADDRESSED HEALTH PROBLEMS

Patients who experienced acute symptoms that normally would have gone to the ED may have postponed care, putting them at increased risk for more acute symptoms. Send general outreach to reassure patients telling them that your facility is safe and capable of addressing non-COVID emergencies.

*"We want to reassure our patients that the ED is prepared to care for patients experiencing non-COVID-19 related emergencies. If you have chest pain, symptoms of a stroke, or other symptoms that worry you, do not hesitate to seek care. We have safety protocols in place to keep you safe."*

# 9

## REMOTE MONITORING AND REPORTING

Remotely monitor patients with messages about screenings, digital health assessments, and education on equipment use to supervise those with chronic conditions and enable better care management.

*"Hi {clientFirstNameProperCase} This is a reminder to take a blood pressure reading. Click here to report your results [Link]. If you have any concerns, please call or text us at XXX-XXX-XXXX to schedule your appointment."*

*"Hi {clientFirstNameProperCase} Welcome to {eventLocationName}. Click here to learn how to set up your new equipment and get started on your health journey {Link}."*





## Back to Business

Routine preventative and wellness care have largely been postponed due to the COVID-19 crisis. Sending patient messages to remind them it's time to schedule appointments helps to fill both care and revenue gaps.

# 10

### PREVENTATIVE AND WELLNESS OUTREACH

Reschedule routine exams, adult and child immunizations, cancer screenings, and preventive procedures like colonoscopies. Reach out to patients to invite them to reschedule these appointments in several ways. Patients can text or call staff, you can set an appointment time and ask the patient to confirm, or ask the patient to self-schedule.

*"Hello {clientFirstNameProperCase}, our records indicate that you are overdue for your routine mammogram. Please text us or call our office at XXX-XXX-XXXX and we would be happy to assist you in scheduling this. We Want You Well."*

*"Hello {clientFirstNameProperCase}, our records indicate that you are overdue for your routine mammogram. As a courtesy, we've reserved a time for your new appointment on {eventDateAtTime} Will this work for you?"*

#### **For Epic EHR clients:**

*"Hello {clientFirstNameProperCase}, our records indicate that you are overdue for your routine mammogram. Please schedule your appointment in your MyChart {MyChartlink}."*



# 11

## ELECTIVE PROCEDURES

There is a spectrum of elective procedures from joint replacements to cosmetic surgeries that can now be scheduled with priority given to patients with more severe health issues.

*"Hello, {clientFirstName}. We are ready to reschedule your procedure. Please text or call us to find a new date and time."*

## Blood Pressure/Hypertension Remote Monitoring Campaign

Due to COVID-19, patients with blood pressure or hypertension issues did not prioritize simple screening appointments for fear of exposure. Providers can proactively engage these patients and teach them how to remotely monitor their blood pressure and report the results to their doctor.

Centers for Medicare & Medicaid Services (CMS) reimburses health systems \$51.61 per patient for remote blood pressure monitoring which includes data review and patient communications about treatment. Monitoring a patient for six months brings in \$310 while monitoring 100 patients in the same time frame generates \$31,000 in revenue.<sup>6</sup>



Remote Monitoring



\$31,000 in Revenue

<sup>6</sup> <https://validic.com/your-guide-to-reimbursement-for-remote-patient-monitoring/>



## Streamline Operations

Use WELL to increase patient retention by reminding patients of follow-up appointments and referrals. Over 98% of text messages are opened within 3 minutes of receipt, making it easier to help patients book these appointments. By automating this outreach, you can ensure prompt communication with patients while freeing up time for staff.

WELL can also be leveraged to make sure schedules stay full and are used efficiently by automating pre-appointment tasks like appointment reminders, collecting insurance information, and facilitating mobile payments. This ensures that everything is set for the patient's appointment while allowing staff to focus on more complex tasks.

# 12

### FOLLOW UP ON REFERRALS

Automate outreach to increase the number of patients completing referrals and keeping the referral business (and the associated revenue) within your healthcare system.

*"Hi {clientFirstNameProperCase}, you've recently visited Houston Methodist and received a specialty referral from {referralByProviderName}. May we assist you with scheduling or obtaining authorization for this referral? {referralSchedulingRequestText}. Please feel free to call or text this number at any time."*



# 13

## FACILITATE RECALL APPOINTMENTS

Engage and retain patients by sending patient reminders to schedule a follow-up appointment with your health system even if it is months in advance.

*"Hi {clientFirstNameProperCase}, our records indicate that {clientFirstNameProperCase} is due for a follow-up appointment. Please call or text us at XXX-XXX-XXXX to schedule your appointment."*

# 14

## AUTOMATE GENERAL APPOINTMENT REMINDERS

Update appointment reminders to reflect current safety protocols.

*"Hello {clientFirstNameProperCase}, we are looking forward to seeing you at {PracticeName} tomorrow {eventDateAtTime} We are requesting that all patients wear a mask. Please call us when you arrive and remain in your car for further instructions."*

## Mammogram Medical Reimbursement

The 2021 National Average Medicare reimbursement rate for a mammogram is \$134.00 per patient.<sup>7</sup> Sending a patient engagement campaign resulting in 100 patients getting a mammogram nets \$13,400 for your health system.



Patient  
Engagement



\$13,400  
in Revenue

<sup>7</sup> [https://www.hologic.com/sites/default/files/2021-02/MISC-03286-Rev-012-Breast-Imaging-Coding-Guide\\_7197r5p.pdf](https://www.hologic.com/sites/default/files/2021-02/MISC-03286-Rev-012-Breast-Imaging-Coding-Guide_7197r5p.pdf)



# 15

## CONFIRM INSURANCE ELIGIBILITY

Consider updating appointment reminders and confirmations with a request for new or updated insurance information or help patients better understand what is covered by their insurance.

*"Hello {clientFirstName} has an appt {eventDateAtTimeShort} with {eventProviderName} at {eventLocationAddress}. Please reply back to this secure message with a picture of your insurance cards (front and back) and photo ID. We would greatly appreciate it. Thank you!"*

# 16

## ENABLE MOBILE PAYMENTS

Due to virtual waiting rooms and telehealth, patients often bypass the front desk. Depending on your integration system, you can collect co-pays by sending links to payment systems such as Swervepay. Send a message request for co-pays along with appointment reminders and confirmations.

*"Hi {clientFirstName}, you have a co-pay due for your upcoming visit. Please use this link to make a payment prior to your visit to expedite your check-in process - {eventSwervePayCopay}"*



## Behavioral Health

The COVID-19 pandemic has accelerated the demand for mental health services. Behavioral health experts can send messages regarding administrative details such as therapist availability, scheduling telehealth visits, and insurance eligibility.

# 17

### THERAPIST AVAILABILITY

Therapists are constantly in session and have little time to return phone calls about their availability. Send messages when requests come in about accepting new patients and provide information about other resources.

*"Hello {clientFirstNameProperCase}, I am not accepting new patients at this time but I want you to know that there are resources available to you. Please contact the National Suicide Prevention Lifeline at 1-800-273-TALK (8255) or the Crisis Text Line's number (741741) to reach someone right away."*

*"Hello {clientFirstNameProperCase}, I am accepting new patients. Please text us or call our office at XXX-XXX-XXXX and we would be happy to assist you in scheduling your appointment. Our office hours are M-F 8am-5pm."*





# 18

## SCHEDULING BEHAVIORAL HEALTH APPOINTMENTS

During the pandemic, most therapy sessions are done virtually and many will continue to be telehealth. Send appointment confirmations and if in-person visits are available, include information about safety protocols.

“Hello {clientFirstNameProperCase}, we are looking forward to seeing you at {PracticeName} tomorrow {eventDateAtTime} We are requesting that all patients wear a mask in the waiting room.”

# 19

## BEHAVIORAL HEALTH INSURANCE ELIGIBILITY AND PAYMENTS

For new patients, send a request for insurance information. Depending on your integration system, you can collect co-pays by sending links to payment systems such as Swervepay. Add a request for digital co-pays to the appointment confirmation.

“Hello {clientFirstName}. As a new patient, please reply back to this secure message with a picture of your insurance cards (front and back) and photo ID. Thank you!”

“Hello {clientFirstName} has an appt {eventDateAtTimeShort} with {eventProviderName} at {eventLocationAddress}. You have a copay due for your upcoming visit. Please use this link to make a payment prior to your visit {eventSwervePayCopay} Thank you!”



## Get Started

For current WELL clients, you can begin implementing the workflows above immediately through Campaigns, Broadcasts, and Keyword Automations. If you are interested in the Self-Rescheduling, Recalls or Referrals functionality, reach out to [accountteam@wellapp.com](mailto:accountteam@wellapp.com) or your assigned WELL client support representative.

### HERE'S WHAT YOU NEED TO DO TO GET STARTED:

- Determine priority for rescheduling appointments based on time of original appointment, appointment type, availability of staff, and other considerations and constraints.
- Outline the changes to locations and safety protocols that need to be communicated with patients.
- Write a text message to respond automatically to inbound keywords and implement the workflows in the WELL platform.

All of the suggested workflows can be implemented directly by your team in the WELL console, provided they have Enterprise user access. If you have questions or would like assistance, please reach out to your WELL CSE who will guide you through implementing these suggestions.

**For new customers, learn more or request a demo at [sales@wellapp.com](mailto:sales@wellapp.com).**



## About Well Health Inc.

WELL™ Health is a SaaS digital health leader in patient communications and the 2021 Best in KLAS winner in Patient Outreach. The WELL Health intelligent communications hub is the only two-way digital health solution engaging patients throughout their entire care experience.

WELL Health enables conversations between patients and their providers through secure, multilingual (19 different languages) messaging in the patient's preferred communications channel: texting, email, telephone, and live chat. WELL Health helps 200,000+ providers facilitate more than 1.1 billion messages for 37 million patients annually. By unifying and automating disjointed communications across healthcare organizations, WELL Health reduces unnecessary provider stress and potential errors, while increasing patient visits and loyalty.

Founded in 2015, WELL Health is based in Santa Barbara, California. WELL Health has been named No. 10 on 2021 Forbes America's Best Startup Employers list, among the 2020 Best Places to Work by Modern Healthcare and ranked #170 on the Inc. 5000 list of fastest growing private companies in 2020.

### THE ROLE OF WELL™ HEALTH IN COVID VACCINE EFFORTS

**Since the COVID vaccine became available in the United States, leading healthcare providers have used WELL Health communications technology to:**

**Facilitate more than**  
**6.5 MILLION**  
**COVID vaccine appointments\*\***

**Send more than**  
**31 MILLION**  
**COVID-related messages, with 51%**  
**of those messages pertaining to the**  
**COVID vaccine\*\***

\*\*Data set from 12/9/2021 to 6/8/2021, pulled by WELL Health Data Insights.