

HIGH TECH = HIGH TOUCH

Which Tools Keep ECPs In High-Tech Touch With Their Patients?



Systems Intelligence from VM

The Intelligent Office

BY JOHN SAILER / SENIOR EDITOR

Electronic communication . . . some might assume that it would make for impersonal interaction between the doctor and the patient. In fact, the reverse is true. As interactive communication technology becomes more automated it allows for more customization and ultimately more, not less, personalization. Eyecare professionals (ECPs) and their patients can now choose the ways in which they stay in touch—by email, text, cell phone, or even the old tried-and-true methods such as landline or postcard.

As electronic communication techniques evolve to enable ECPs and their patients to communicate as frequently (or infrequently) as they like, in the ways in which they choose, newer technologies are also becoming available. Now, not only do these systems automate recalls, scheduling and other basics of com-

munication between ECPs and patients, but they can also access and manipulate all the data a practice has on file to make staff members exceedingly more efficient and practitioners exceptionally more effective.

By now, most ECPs should be familiar with the four primary interactive, patient communication and engagement systems in widespread usage throughout the optical field—4PatientCare, Demandforce, Solutionreach and Websystem3—and the basic features they offer. In addition, a couple of new players have recently come forth to expand the field even further—TeleVox and Brevium.

On the following pages, learn how ECPs throughout the country are using these patient communication systems to keep their schedules full, make their staff members more efficient and ultimately improve their bottom lines. In addition, new features and new technologies are enabling ECPs to drill down even further, accessing data they already have on file while

gathering new information to not only bring in more patients but to maintain and improve the relationships with the ones they already have.

Read the following “High Tech = High Touch” sections about Recalls and Reactivation, Integrating and Partnering, and What’s on the Horizon to find out how you too can tap into automated electronic communications systems to free up your time, fill up your schedule and create a far more efficient operation.

This article continues Vision Monday’s series on The Intelligent Office, covering how eyecare practices use new technologies to manage information with unprecedented speed and efficiency. From reaching out to patients before they make an appointment, through connecting with them while they’re there, and following up with them afterward, The Intelligent Office automates the interaction between patient and practitioner, streamlining communications and improving efficiencies. For more on The Intelligent Office, see sidebar, page 48. ■



Recalls and Reactivation

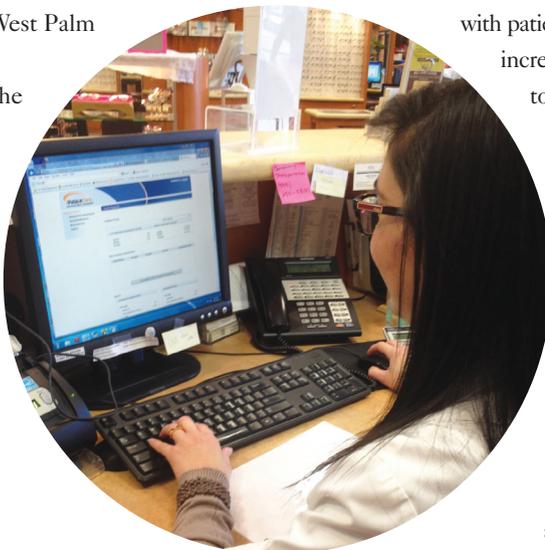
Appointment reminders and patient reactivation remain the foundation of patient communication

Ensuring that patients make and keep their appointments at the appropriate interval, while simultaneously keeping practitioners' schedules optimally filled, are among the most basic and prevalent uses for patient communication systems. Automating the old-fashioned manual system of sending out appointment reminders on postcards via snail mail, electronic systems now automatically mine a practice's data to determine who needs to be reminded to keep an appointment and who needs to be notified that it's time to make one.

Based on pre-determined preferences already entered into a patient's record, these systems know whether to send out a reminder via email, text or telephone.

"Not every patient wants email or text message notifications, yet many do, and we find it tremendously valuable to provide communication in the format our patients request," said Demandforce user April Jasper, OD, FAAO, of Advanced Eyecare Specialists in West Palm Beach, Fla.

"The key is getting the right message to the right patient with the modality that they respond to," Jeffrey J. Guterman, MD, MS, chief medical officer with 4PatientCare, told *Vision Monday*. "We configure communication campaigns to the specific provider, location, appointment reason, insurance, age group, gender, preferred language, and patient communication preference."



David Golden, OD, describes his practice's use of 4PatientCare's 'Intelligent Escalation' as "increasing in the amount of touch" when recalling his patients.

The company recently developed "Intelligent Escalation" to assure an effective and efficient outreach campaign. Dr. Guterman explained how the system works: "You can initiate communication with a low-cost modality (email or text) and escalate to more advanced methods such as automated voice, reserving the most expensive human voice and postal services only for those who do not make an appointment with the less expensive approaches. 4PatientCare automatically tracks who requires what communication, with what message, and with what modality."

David Golden, OD, uses 4PatientCare in his Golden Optometric Group practice in Whittier, Calif. He described it as "increasing in the amount of touch" as it proceeds from email to voicemail to phone call or however you've customized it. "It's a huge time saver that frees us up to focus on our patients instead of doing the mundane tasks of the day," he said.

Not only does this illustrate the latest capabilities available when automatically connecting with patients, but it also shows the increasing availability of customization. "Our motivation for developing Intelligent Escalation came from the fact that each patient has their own desired approach to communication and each practice also has their own approach to communication," Dr. Guterman said.

In many cases, an actual telephone call is necessary because obtaining patient's cell numbers and email addresses remains elu-

sive. "The most basic tenet of communication is that you have to use a modality for which there is data in the practice management system," said Dr. Guterman. "Email and text messages are great communication modalities but the average optometric practice has only 50 percent accurate email addresses and cell phone numbers. In fact, the two most common entries in the email field are the words "refused" and the email address no@none.com."

Still, even a human voice phone call can be automated. Peter Cass, OD, of Beaumont Family Eye Care in Beaumont, Texas, recently implemented Solutionreach's SR Voice system, which combines automated phone messaging with a custom built natural voice engine. "The most important feature for us has always been the recall system," said Cass, who installed Solutionreach when he moved to a new location in January 2011.

"There are several ways to do recall, and we prefer text based," he said. But for those patients for whom the practice has no cell phone information, he added, "We supplement text with Solutionreach's new SR Voice, which reaches out to patients for whom we have a phone number but no cell phone information. It can search our systems and find possible working phone numbers for those patients."

Postcards, The Modern Way

At times, automation can even be combined with seemingly old techniques, such as postcards, for effective results. Among the early adopters of Demandforce's system, Robert C. Janot, OD, FAAO, of Sulphur, La., participated in a beta testing group of Vision Source doctors. "I found it to be a welcome change from the traditional staff calling patients or mailing postcards for appointment reminders," he said. "As a totally automated system, integrating directly with my practice manage-

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Automating Everything From Postcards to Text Messages

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ment software (OfficeMate), Demandforce has freed up a staff person by automating my recalls and appointment confirmations via text and email. By the time we approached the Vision Source national meeting in April 2011, it had such a profound impact on my practice that I actually provided a testimonial in Demandforce's vendor presentation."

He's come full circle and is back to sending out postcard recalls at times, but now he's using Demandforce to manage them. He's found that there's still a portion of his patients who prefer this less technological way of staying in touch. "For those patients who do not use email or text messaging, typically our older patient population, Demandforce has recently added postcard recalls," he explained. "Before you think how antiquated that is, these postcards are super slick, double-sided, glossy cards that are fully customizable with your practice logo, message, patient testimonials, and even promotions. They are done behind the scenes with no input necessary from the staff, pulling data from our practice management software. They are even posted for mail and sent from Demandforce."

Reminders are not just for appointments but for eyeglasses and contact lenses as well. Some patient communication and engagement systems offer a feature that automatically notifies patients when their glasses or contacts are ready.

Drilling Deeper

There's a new category of patient reactivation technology that drills deep into the practice's records to catch patients who have fallen through the cracks. Brevium's software combs through every patient record every night attempting to find patients who are overdue either because they didn't respond to a recall or because they never got one in the first place. "It's not about bringing back any patient," Steve Gottfredson, Brevium's vice president of sales and marketing, told *Vision Monday*. "It's about bringing back the right patient at the right time to see the right doctor at the right location at an appropriate interval of care."

The system works by reviewing every patient's record to see if they are scheduled for an appointment or for a recall. If they're not, it reviews their visit history and billing data to determine any dis-

eases they might have and the date they were last seen. Depending on their health, Brevium (Latin for "brief"), determines when they should be contacted based on tolerances that are preset by the practice.

"It's one thing for a practice to try to bring back patients who haven't been in at some generic interval of care, but it's even better to ensure patients with specific disease states are being targeted at customized care intervals," Gottfredson told *Vision Monday*. "For optometric practices with a medical emphasis, Brevium software makes it easy to target patients with glaucoma at three months, diabetics at six or 12 months, etc."

When it's time to contact patients who need to be reactivated, a staff member opens up the Brevium caller program that lists the name of the patient, their phone number, visit history, diagnosis, the insurance plan on file, and how long they are overdue. After making the call, the staff member can indicate the results in the program, and Brevium monitors the patient's reaction, giving credit to the caller if an appointment is made.

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Step Into The Intelligent Office

Vision Monday's Intelligent Office series of articles continues exploring how eyecare practices and optical retail stores use new technologies such as smart phones, tablets, apps and cloud computing to manage information with unprecedented speed and efficiency.

In this installment of The Intelligent Office series, *Vision Monday* explores patient communication and engagement systems from 4PatientCare, Brevium, Demandforce, Solutionreach, TeleVox and Websystem3. These software programs integrate with electronic health records, practice management systems and other electronic tools to interact with patients

before, during and after an appointment, ensuring that they remain engaged throughout the entire process while making the practice itself more efficient and successful.

In conjunction, *Vision Monday* has also created an information-rich Intelligent Office microsite at www.visionmonday.com/intelligent-office that serves as a unique resource where you'll find information from The Intelligent Office series as well as links to related articles, videos and other content about mobile health, EHR, patient portals, patient education, diagnostic instruments, patient education, lens and dispensing technology, practice management and staff training. ■



Integrating and Partnering

As 'The Intelligent Office' becomes more automated, communication systems network more partnerships

ECPs continue automating their offices with electronic health records (EHRs) and practice management systems. According to the latest CMS figures from November 2013, a total of 13,469 optometrists have registered for the Medicare EHR incentive program. As electronic health records become more and more commonplace in practices throughout the country, there's an ever increasing need for patient communication systems to integrate with them.

When asked which programs they're compatible with, providers of communication systems will invariably say that they are capable of working with all of them. This is because integration is possible as long as the system can generate a simple report, according to Jeffrey J. Guterman, MD, MS, chief medical officer with 4PatientCare. He said that 4PatientCare has

maintained a "Switzerland" approach, integrating with every major practice management system on the market today. Most recently, 4PatientCare announced partnerships with MyVisionExpress and with VisionWeb's new Uprise electronic health records software in 2013.

4PatientCare also announced a partnership with ECP alliance PECAA in November 2013. And Dr. Guterman said, "4PatientCare has partnered with every major system vendor in the eyecare industry and associations such as the Optical Women's Association. We were the first communications company to become a certified Eyefinity partner and have our True Webscheduler connect directly to the EyeMed 'Find a Provider' locator."

Solutionreach partnered with Eyemaginations last year to provide automated animated education

to the patients of its users. In addition, Solutionreach has also established relationships with Eyefinity, Cleinman Performance Partners, IDOC and The Williams Group.

After entering the optometry market just two years ago, Demandforce now partners with a range of industry leaders including: Carl Zeiss Vision, Vision Source, Essilor, ABB Concise, Eyefinity, Compulink, MaximEyes, RevolutionEHR, Crystal Practice Management, My Vision Express, Red Tray and Optometry Giving Sight.

Websystem3 took its alignment with industry leaders to extremes last year when the company announced that it was purchased by contact lens company, CooperVision, Inc., in December 2012.

Beyond partnering with electronic health records,

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'Bringing Back the Right Patient at the Right Time'

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The system gathers additional metrics including whether patients kept their appointments and how much money they spent, enabling even further analysis of the effectiveness of reactivation.

To automate the recall system, Brevium recently integrated with TeleVox, which automatically phones patients who need to be reactivated. The patient then receives an automated call with options for connecting with the office in order to make an appointment.

"AIO recently began participating in a beta test partnership between TeleVox and Brevium," Shelby Williams of AIO Vision in West Mifflin, Penn., told *Vision Monday*. "This software is able to mine data from our current electronic health records, based on a number of easily adjusted set-

tings. We are able to recall patients based on diagnosis, doctor or appointment type and make an automated or live recall that they are due, or overdue, for their care."

Justin Everette, TeleVox's senior marketing manager, told *Vision Monday*, "The integration with Brevium allows practices to use both automated calls and human calls to have the greatest impact to drive patient compliance and improve care quality. In addition, practices can bring patients back in for overdue care with a very clear picture of the return on investment from those efforts."

According to Jessica Crooker, OD, of Dr. Gordon Price and Associates, in Scituate, Mass., her practice has reactivated almost 90 patients so far using Brevium. ■



After calling patients indicated by the Brevium system, staff members can record the results in the program.



Networking Both Within and Outside the Optical Field

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practice management systems and companies within the optometric profession, patient communication and engagement systems are also aligning themselves with mainstream technology leaders as well.

For example, Demandforce works with partners such as search engines and social media sites to generate more attention for the reviews posted by customers using the system. “Partners such as Bing, Facebook and CitySearch provide automated syndication of the reviews we collect for our customers to the other major sites/search engines,” said Aimee Leifer, head of Demandforce’s Health Services Division.

A few of TeleVox’s partnerships are with GE, NextGen, and Allscripts.

Mobile – The Next Big Thing

Soon after Demandforce realized that approximately 45 percent of those interacting with emails were doing it on mobile, according to Leifer, “we made all of our products ‘mobile first,’ designed for a user experience on a mobile phone,” she told *Vision Monday*. “When you build it, you deliver it so it’s optimized for mobile. The old way it was developed for



Demandforce began designing for mobile when the company realized 45 percent of users were interacting in that way.

the computer first then adjusted and squeezed to fit mobile,” she explained.

The results were immediate and dramatic. “We saw a massive increase in the number of people completing reviews,” she said. “It increased interaction because it was user friendly.”

Reviews and Surveys

David Golden, OD, of the Golden Optometric Group practice in Whittier, Calif., has also noticed an increase in post-visit survey responses when he gives patients a chance to reply at their convenience. “People don’t take the time in the office to respond to a survey,” said Golden, who uses 4PatientCare in his practice. “They like to do it on their own time.”

Intelligent surveys from 4PatientCare include both traditional email-based communication after a visit and a new in-office survey with real-time

alerting. “With our real-time alerting system, practices now have the ability to directly speak with an unhappy patient or customer prior to them ever leaving the office,” Guterman of 4PatientCare told *Vision Monday*. “Your staff can now help prevent a negative

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OD Excellence and PA eHealth Studying E-Reporting of Diabetic and Glaucoma Exams

The Pennsylvania eHealth Partnership Authority is conducting a statewide study in conjunction with primary eyecare providers on the effectiveness of electronically sharing medical records on compliance reporting for diabetic eye exams and glaucoma tests. The study is focused on the use of DIRECT messaging, a secure email system to share patient medical records and health information.

“By sharing health information electronically, we expect ophthalmologists and optometrists to improve their compliance reporting for diabetic eye exams and glaucoma tests,” said Alix Goss, Pennsylvania

health information technology coordinator and program director for the Pennsylvania eHealth Partnership Authority. “By using technology, patients will have better care because doctors will have information when and where they need it.”

The Pennsylvania eHealth Partnership Authority is working with the OD Excellence alliance of eyecare professionals. The study is designed to track and analyze the reporting rate of referrals between optometrists and ophthalmologists.

The study is open to optometrists and ophthalmologists who currently use, or are willing to install, DIRECT messaging, and incorporate qualifying

patients in the study. For more information, contact Richard Sabbara at c-rsabbara@pa.gov.

The Pennsylvania eHealth Partnership Authority is an independent state agency that is working to meet federal requirements for eHIE (electronic health information exchange) in Pennsylvania. eHIE is the electronic sharing of health-related information among unaffiliated providers and organizations according to nationally recognized standards. Pennsylvania was awarded \$17.1 million under the American Recovery and Reinvestment Act to help establish a health information exchange. ■



What's on the Horizon for Patient Communication Systems?

Like many electronic health records and practice management software programs, patient communication and engagement systems continuously add features, both in conjunction with other software programs as well as on their own. For example, Solutionreach became one of the first cloud-based companies in 2000, and others, such as Websystem3, have followed suit.

A more recent development for Solutionreach was the 2013 launch of PatientReach, a digital application designed to improve the patient check-in process. Practices can download PatientReach onto an iPad, transforming it

into an automated system for gathering patient information. The iPads are distributed to incoming patients, who then begin a simplified check-in process.

Aimee Leifer, head of Demandforce's Health Services Division, told *Vision Monday* about a number of new developments in store for this patient information and engagement software. These include a major change to text messaging that will help users adhere to new TCPA (Telephone Consumer Protection Act) laws. Initial tests show a significant increase in the utilization of text messaging to confirm appointments, according to Leifer, who said

that two times as many patients were confirming through text than before the change.

Other new additions planned for Demandforce include two-way confirmations with other management systems and new automated optometric-specific templates to help doctors manage care. Demandforce has also been selected by Yelp to bring bookable appointments to its pages. Real-time scheduling will allow patients to book and confirm their own appointments, similar to making dining reservations on OpenTable, a feature that's already available from 4PatientCare. ■

Feedback, Both Good and Bad, Helps Build Practices

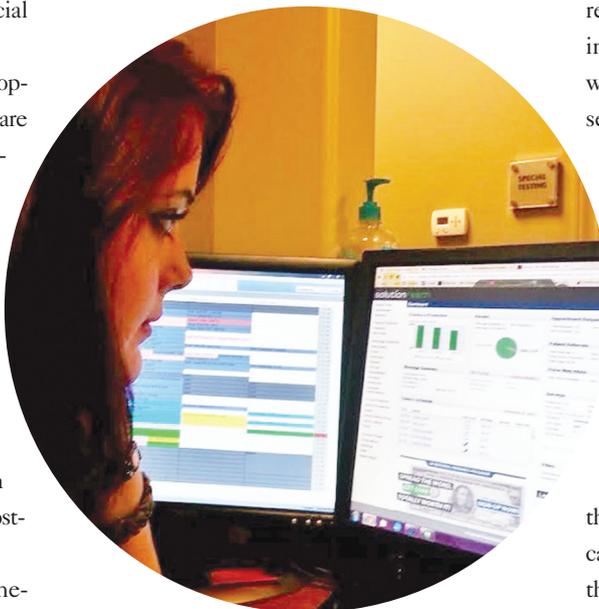
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patient experience from going viral through social media and review outlets."

Websystem3 directly links satisfied patients to popular online review sites. The software enables eyecare practices to deploy survey requests, push text messages to patients and integrate with Facebook.

Peter Cass, OD, of Beaumont Family Eye Care in Beaumont, Texas, has been using Solutionreach's survey feature for about a year now. "We're getting a little more aggressive with them so we can monitor how the visit went, how we are doing things, and tweak if necessary to try to improve things if we have a problem," he told *Vision Monday*. But he also takes it further than that by replying to every survey completed and posting them to the internet to gain more traction.

"We reply to every survey," he said. "If somebody sends us a survey, it automatically gets posted to the website. We reply to every survey, and if it's bad, we start with an apology. We had a new patient



Solutionreach has helped Beaumont Family Eye Care grow 20 percent in its second year since moving to a new location.

choose us specifically because we went back and responded to every single survey. We're also posting all the surveys to the Solutionreach website, which Google picks up as a secondary website for search, grabbing the better ones and embedding them on a page of our website."

Not only has this enabled Cass to promote his practice, but it's also helped him improve it based on real experiences from his patients. "We're getting a lot more feedback than in the past," he said. "I would much rather know about problems and have the opportunity to address them than have unhappy patients out there."

He explained his procedure for dealing with a negative survey: "We print it out, find out where the problem is and what we can do to fix it. Then we call them within a few minutes. It often surprises them that we call. We apologize and make it better. Patients respond really well to that. In the past, the patient would probably just go away mad and probably tell others." ■