CORE STRATEGIES TO REDUCE FRICTION IN PATIENT ENGAGEMENT
The Shift to Healthcare Consumerism

- **30%** of healthcare spend is out-of-pocket for patients.²
- **40%** of patients would pay medical bills in advance if they knew their cost.⁴
- **$150B** is lost annually because of missed appointments in the United States.⁵
- **Over 80%** of consumers said that shopping for healthcare should be as easy as shopping for other common services.¹
- **72%** of healthcare consumers prefer digital self-service interactions to phone.³

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¹ 2020 Change Healthcare Harris Poll Consumer Experience Index  
² National health expenditures by type of service and source of funds, CY 1960–2017. CMS.gov  
³ EBRI/Greenwald & Associates Consumer Engagement Health Care Survey (CEHCS)  
⁵ Healthcare Innovation Article “Missed Appoints Cost the US Healthcare System $150B Each Year”, 2017
Patients Feel Healthcare Experiences are Taxing and Burdensome

67% “Right now, it feels like every step of the healthcare process is a chore.”

62% “The healthcare experience feels like it is purposefully set up to be confusing.”

56% “The healthcare experience is so bad today that I know people who will do anything to avoid seeking care.”

Source: 2020 Change Healthcare-Harris Poll Consumer Experience Index Research
Patients are Expecting the Future of Healthcare

- **Website**: This website is so difficult to navigate!
- **Scheduler**: Why didn't they communicate that I need lab results and imaging prior to scheduling?
- **Reminders**: Robocalls feel impersonal!
- **Patient Registration**: Haven't I filled this out already?!
- **Patient Portal**: I didn't understand the instructions. What can I do?!
- **Patient**: This portal is too difficult to use!
- **Treatment Instructions**: Why am I getting multiple bills? These financial statements are too difficult to comprehend and act upon!

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Section 2.0

Short-Term Provider Strategies
Patient’s desire for a **personal** provider connection doesn’t change with digital channels. Patients also feel that getting information needed to make sound healthcare decisions is a **chore**.

Provide the patient with **easily accessible** information about the provider they are going to visit ... like how long they’ve been in practice, their schooling, etc.). Share information that can make the provider more **relatable**.
Patients don’t understand what the cost of care will be, which many times leads to them avoiding care.

**Current Challenge**

**Opportunity**

*Price Transparency* is now an expectation of the consumer. Providers not only need to improve transparency before the visit but also provide information and bills to patients in a **timely** manner post-visit.
While Most Feel Empowered to Identify Providers for Their Needs, Transparent Pricing Information is More Elusive

The Index Says:
TOTAL FOR FINDING CARE

86

NOT VERY DIFFICULT

LEVEL OF EFFORT

Extremely Difficult (150-200)
Very Difficult (101-149)
Difficult (100)
Not Very Difficult (50-99)
Effortless (0-49)

108 Comparing price estimates across potential providers
101 Estimating out-of-pocket costs for appointments/treatments
91 Determining if/how treatment is covered by my health insurance
87 Finding quality information about a provider
85 Understanding the provider’s approach to medicine/advanced techniques
84 Finding objective reviews or testimonials for potential providers
78 Determining which providers work best for my schedule
74 Finding the right provider(s) for my need
65 Determining which providers accept my health insurance

Source: 2020 Change Healthcare-Harris Poll Consumer Experience Index Research
Patients don’t want to be handed a clipboard and stacks of papers when they show up for an appointment.

Reduce friction by having patients fill out pre-visit forms digitally prior to appointment day. Reduce redundant questions and paperwork so that patients aren’t required to give information twice.
Strategy #4 – Arm Patients With Knowledge of What to Expect During Their Visit

Current Challenge

Many patients deal with the anxiety of not knowing their options or possible outcomes of a health visit beforehand.

Opportunity

Inform patients prior to visit about possible treatment options available after the appointment. Having information beforehand will help reduce anxiety and appointment no-shows.
Long-Term Provider Strategies
Strategy #1 – Seek to Remove Barriers Which Impede a Patient’s Access to Care

Current Challenge

The ease of access to healthcare is not as easy as patients are used to in other industries. Current digital experiences have as much friction as manual efforts.

Opportunity

Implement a digital front door strategy to bring in prospective patients and make it easy for them to schedule appointments. Look to create a “frictionless” consumer experience throughout their healthcare journey.
Consumers Avoid Seeking Care Because It’s Too Hard

THE CONSUMER EXPERIENCE: TODAY’S HEALTHCARE JOURNEY

INSURANCE LINE OF BUSINESS

- **Total**
- **Medicare Advantage**
- **High deductible employer-sponsored**
- **Other employer-sponsored**
- **Individual plan**
- **Medicaid**
- **Uninsured**

Source: 2020 Change Healthcare-Harris Poll Consumer Experience Index Research
Healthcare feels disjointed and siloed to patients. Patients want to take ownership of their healthcare but struggle to navigate healthcare's multiple bureaucratic layers.

Seamlessly connect every touchpoint throughout the patient journey by sharing information between providers, patients, and across organizations. We need to simplify access to the information and tools needed to make high-value healthcare decisions.
Strategy #3 – Simplify the Financial Process for Patients

Current Challenge

Patients have to deal with complicated billing statements that cause dissatisfaction and payment delays. Those unknown costs discourage consumers from needed care.

Opportunity

Simplify consumers’ ability to reconcile insured benefits with provider billings. Give patients information on what bills they will be getting so they can plan.
The Value of a Strong Patient Engagement Strategy
Providers Who Streamline Healthcare to Meet Patient Expectations Will Gain a Competitive Advantage

- **Drive Patient Acquisition** through digital, retail-like shopping experiences that let consumers search local providers, compare reviews and cost, schedule their treatment, and pay in advance.
- **Increase Patient Retention** by providing a seamless patient experience to prevent leakage.
- **Boost Collections** by providing a patient-centric payment solution to collect from patients as early in the revenue cycle as possible.
- **Optimize Efficiency** by giving patients the autonomy through technology to shop, schedule, and pay for their care, enabling providers to work by exception,
Questions?

First, a quick poll question for you.