Patient Experience:
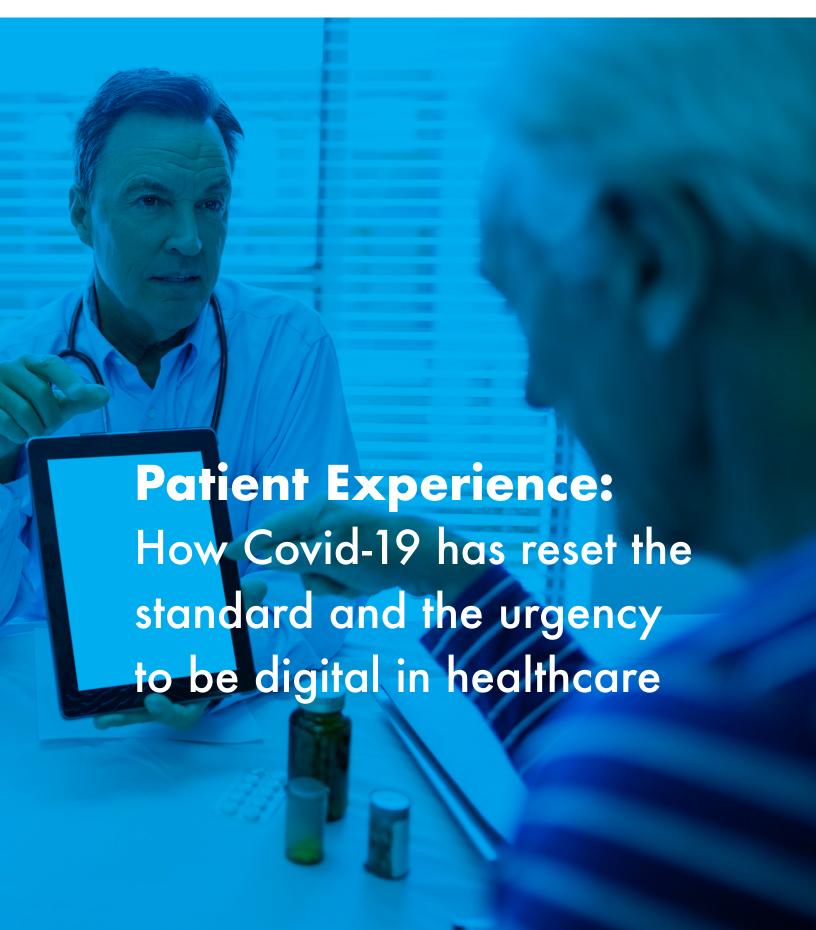## How Covid-19 has reset the standard and the urgency to be digital in healthcare

As everyone has a personal story about their pandemic, it is clear that some of the "new normal" is here to stay. As a world, we have accelerated our progress to digitization in every major sector. We are now doing 4 times more shopping online that we were in mid 2019. Being at home in lockdown, many basic transactions have moved online and even the heavily entrenched activities like grocery shopping have changed beyond recognition as people do not want to risk a crowded supermarket. Because the need for information is so apparent in healthcare - it has always been digital forward from a patient viewpoint. Healthcare appears to be the second most searched topic on Google. On top of that, healthcare is the third largest web activity across all generations. Digitalization has transformed relationships in the healthcare sector, as patients are more self reliant, better informed, more involved in their health and well-being journey.
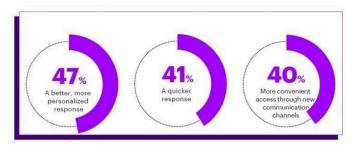
Technology increased satisfaction levels and patients moved their care "in-home".

What may be surprising to some is that actually, with all the challenges of COVID-19, patient experience has improved and customer satisfaction is up. Revealing results give room to feel positive about thoughtful technology - based on findings from an international survey by Accenture across 2,700 patients located in the United States, the United Kingdom, France, Germany, China and Japan with participants that had to have been going to a health care facility for treatment or self-administering at home and have one of the following conditions: Cardiovascular, Immunology and Oncology.

9 OUT OF 10 felt that the care they received from their healthcare provider was as good or better than before COVID-19

Reasons for improvement in care:

| 47% A better, more personalized response | 41% A quicker response | 40% More convenient access through new communication channels |

Conditions changed during 2020 with far fewer patients in the system

- 70% of patients deferred or cancelled treatments due to the COVID-19 pandemic.

- 1 out of 5 patients switched to a different therapy due to COVID-19, while nearly half considered making a change.

- 82% of patients said that they felt at least slightly afraid

- 16% were very afraid of possible exposure during a visit to their healthcare provider

- 77% of patients had their clinical trials suspended or delayed due to COVID-19

Virtual tools became essential lifelines for communication and guidance for patients now administering their own treatments at home. By using technology to support communication and care, healthcare providers were largely able to maintain or even improve on the patient experience. Patients appreciated the more personalized interactions, the faster response time, and the convenience of being able to manage and monitor their care from home. Nearly half of all patients reported that they are now getting treatment at home instead of going to their healthcare provider's office.

There is optimism that these changes should continue:

60% of patients want to use technology more for communicating with healthcare providers and managing their conditions

41% of patients used video conferencing to communicate with their healthcare providers about treatment – for many of them, this was their first-time using video calls for healthcare (70%)

44% of patients used new devices or apps to help manage conditions remotely during COVID-19

Increased telemedicine became a go-to for patient care

The impact of Covid-19 on consumer behavior has been "sweeping and immediate," a McKinsey and Company study found. To succeed in the "next normal," organizations must raise the bar for digital excellence, anticipate customers' needs, and meet increased expectations for a safe environment—findings that have strong implications for the healthcare revenue cycle.

Consider the ways in which Covid-19 transformed digital healthcare behavior. Before the coronavirus outbreak, just one in 10 consumers had tried telehealth. Now, experts predict virtual care visits will soar to more than 1 billion this year—and 89% of consumers report that they are satisfied or very satisfied with the experience. As this shift takes place, healthcare revenue cycle departments must assess how demand for digital access and excellence at each point in the care experience affects expectations for the patient financial experience—and where to invest to gain competitive advantage.

There's also been an explosion of mental health issues during the pandemic from isolation and the transition back to normal life. Compared to 2019, depression and anxiety rates have increased by over three-fold.

Patients are seeking online therapy options, as seen in Google search trends. There are a number of companies like Genoa Telepsychiatry and BetterHelp that offer these services, which are likely to have even higher utilization rates in the future. Because the doctor/therapist-patient relationship is rooted in personal connection, there may be a role in virtual reality-based telepsychiatry options in the future if patient mobility or travel becomes an issue.

However, telemedicine applies to more than just psychiatry. While the physical exam remains an important aspect of medical visits, many medical issues can be diagnosed and managed virtually. This is clearly evident in the growth in companies like Teladoc, whose Q2 revenue grew by 85% and total visits increased by 203% this year with the pandemic. Since virtual doctor visits reduce wait times, transport issues and individual mobility concerns, telemedicine is likely to be increasingly incorporated into routine medical care.

The move toward digital-first interactions

Consumers have "recalibrated their expectations for safety" following the pandemic, the McKinsey study notes, with a strong desire for contactless service. Today's digital-first consumer will expect virtual check-in—from online collection of data to communications via text or app that let patients know when their healthcare provider is ready to see them. For the revenue cycle, this means increasing the emphasis on tools that support online scheduling, remote eligibility checks, and digital financial communications with patients. It necessitates a revamp of traditional front-office procedures, including a shift away from capturing updates to patients' medical history and billing information on paper or in the office. And it calls for communications delivered in the consumers' preferred channel of delivery, from email to text to online apps or even phone (still a preferred option among many seniors).

Revenue cycle teams should explore opportunities to tighten up processes by transferring paper-based work to electronic interactions. When patients require one-to-one support, organizations should be looking for ways to engage patients by chat or by phone, where needed, depending on their preference. While a study conducted about seven months before the pandemic indicated some consumers were hesitant to incorporate chat bots into their healthcare experience, the desire to limit exposure to Covid-19 likely has changed their mindset. One best practice for adoption of chatbots and other tools: Emphasize safety, speed and convenience.

The rise in anticipatory customer service

The financial stressors related to Covid-19 are numerous—and they aren't limited to the expense of a Covid-19 initial diagnosis or record levels of unemployment:

- **87% of Covid-19 patients experience a lingering symptom two months after they were diagnosed.**

- **Patients with lingering symptoms aren't limited to those who had severe cases of Covid-19, according to the Centers for Disease Control and Prevention (CDC). In fact, one-third of "long haulers" who were not hospitalized experienced symptoms three months after diagnosis, the CDC found.**

- **Those who experience ongoing effects of Covid-19 may face high healthcare bills. For patients who remain too ill to work, these costs are especially overwhelming.**

These financial stressors weigh heavily on consumers' minds, and they likely will shape consumer purchasing decisions long after the pandemic is over. As a result, the ability to anticipate patients' financial needs and respond with agility and compassion will prove in the months ahead.

To successfully engage consumers who seek medically necessary treatment as well as those who have postponed preventive care, revenue cycle departments must take a hard look at the barriers that keep consumers from returning to healthcare facilities. Such barriers include lack of information around cost and options for managing their medical expense.

With this information in hand, healthcare organizations should:

- **Proactively reach out to patients to schedule postponed care.**

- **Uncover the concerns that hold patients back from scheduling treatment.**

- **Offer customized, highly flexible solutions—including around payment— that meet individuals' needs.**

Increased flexibility around payment terms and financing options is critical. Consider offering not just deep discounts for patients who have lost their jobs due to the pandemic, but also short-term and long-term financing that makes monthly payments more affordable. Give patients the option to self-manage their accounts, with the option to lower monthly payments when financial circumstances change, and allow them to combine accounts into a single payment plan.

Developing a Consumer-First Approach

The all-encompassing impact of Covid-19 on consumers and their families requires that hospitals rethink their approach to consumer financial engagement. By anticipating the trends that could stick following Covid-19, revenue cycle leaders can develop a patient-friendly experience that promotes patient retention and satisfaction and strengthens their organization's financial health. Creating patient led experiences that reduce the stress of

visiting a facility, emphasize the safety and hygiene at any point of the procedure and also accommodate family members or additional caregivers will drive customer satisfaction and goodwill

Recognizing the key role of nurses in the patient experience and in their hearts

Nurses are often the unsung heroes of a patient's clinical experience. Throughout COVID, they have brought courage, compassion, caring, determination and humour to work with them, as thousands of Tik-Tok dances within medical facilities bear witness.

"Often nurses are invisible in the discussion of health care, but the COVID-19 pandemic has brought to light the indisputable need for nurses," says Patricia Davidson, dean of the Johns Hopkins School of Nursing. It's become clear, she says, that "nurses provide the bulk of care and assume the brunt of danger that comes with stemming a worldwide health crisis."

Before the pandemic, nurse practitioner Jason Farley was embarking on the first fully telehealth-based study approved at Johns Hopkins, evaluating at-home treatment for sexually transmitted diseases including HIV/AIDS. At the time, he says, the concept of all-remote care seemed avant-garde.

"It really felt like we were pushing the envelope," says Farley, who says his infectious disease practice is now 90% telehealth.

According to Davidson, the potential for telehealth expansion has been clear for many years but it took a pandemic to break resistance to it. "The uptake of telehealth has been a silver lining potentially moving us forward decades over a few short months,"

The empowerment of nurses through IntelliTek Health's Conversational AI products, that are tailored to specific workflows and are designed to minimize repetitive inputs, record events by exception and take care of the JCI compliance workload in a fully automated solution is the next big thing and cannot come a moment too soon. As the people we picture when the world stood to applaud frontline healthcare workers, it is the nurses that have suffered the most in 2020 - over 1500 have been lost across 44 countries having died from Covid up to the end of October 2020. Often it is the nurses that create the most meaningful interactions with patients and their families, and with the power of technology designed by people with healthcare expertise, putting them back in front of patients and away from their computers will be a welcome sight to all.