

The Benefits of Patient Education Software



A roundup of several available technologies.

BY BLAKE K. WILLIAMSON, MD, MPH, MS; RICHARD M. AWDEH, MD; JOHN P. BERDAHL, MD; ROBERT J. CIONNI, MD;
DARRELL E. WHITE, MD; TERRENCE J. DOHERTY, MD; AND JAMES C. LODEN, MD



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Calibrator Health: One Way to Establish an Emotional Connection With Patients

BY BLAKE K. WILLIAMSON, MD, MPH, MS

Establishing emotional connections with patients and providing memorable experiences can be just as impactful as delivering good surgical outcomes. To be truly exceptional in 2020, you must deliver on all three of these elements.

Surgeons may not have taken courses on the patient experience, but they did swear to uphold the Hippocratic Oath—and its provisions on warmth, sympathy, and humanity are guides for addressing patient experience and practice culture. Both of these are especially important if you have a large practice with multiple providers and locations, as we do at Williamson Eye.

With the increasing consumerization of health care services, providing a high-quality patient experience is no longer a luxury but a business priority. Patients who have a truly great experience are much more likely to refer people they know to that practice. With that in mind, taking steps to provide exceptional service every time is crucial.

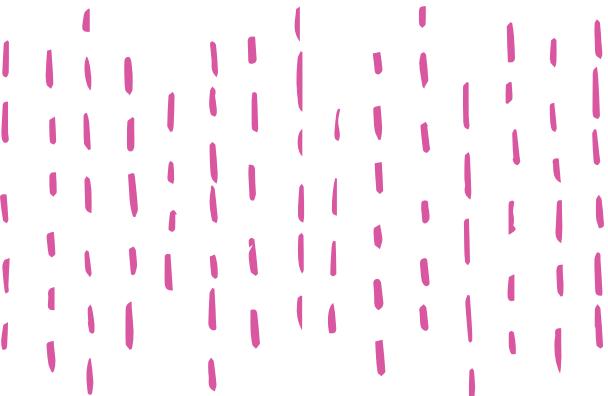
THE FIRST STEP: MEASURE THE EXPERIENCE

Before you can improve the patient experience, you must measure it. To help us do this, we chose Calibrator Health (www.calibrator.com, Figure 1), not only for its ease of use but also for its robust feedback management platform. Calibrator offers a number of tools to help practices optimize the patient experience. Its system delivers real-time patient surveys and collects feedback via text messages.

We chose a text-based platform because of high open and response rates. Industry data show that text message systems have open rates as high as 98%,¹ and the average response rate across Calibrator customers is more than 35%.² These rates are exponentially higher than those for email surveys or the old-school paper surveys we used to have at our front desk. Additionally, according to the company's data, 30-year-olds are just as likely as 70-year-olds to respond to texts; this fits well with the ages of our average LASIK and refractive cataract surgery patients, respectively.

Calibrator can calculate your patient experience scores by location, individual provider, and even visit type. With the company's high response rates, by about 1 week after launch we had comprehensive, granular data on our entire organization and staff.

The Calibrator system also uses a series of algorithms to automatically classify patient comments any time follow-up is required and combines



that with a proprietary issue-tracking system to make sure no feedback slips through the cracks. This has been one of the most beneficial aspects of the technology because it allows us to address our unhappy customers before they vent their frustrations online. Often a patient is so appreciative that a doctor or nurse called to address his or her concerns that our biggest potential detractors become our biggest promoters.

GET MORE REVIEWS, SHARE POSITIVE FEEDBACK

To stay competitive in today's marketplace, a positive online presence is a must, but most eye surgeons don't like to ask their happy LASIK patients to review them on Facebook. A technician can ask, but how many patients will actually take the time to write the review? Instead, we use Calibrator to automatically send text reminders to patients, prompting them to share their experiences online. For those looking to streamline online review



Figure 1. A graphic from the Calibrator Health dashboard.

Courtesy of Blake K. Williamson, MD, MPH, MS

TAKING IT ONE STEP FURTHER: ONLINE REPUTATION MANAGEMENT

BirdEye (www.birdeye.com), Reputation.com, and Podium (www.podium.com) all offer a suite of tools to help practices understand their online presence and even respond to patient reviews.

Calibrator Health has an integrated partnership with Reputation.com and is developing the same relationship with BirdEye.¹ Now whether a negative patient

comment is received on a review site or from the practice's surveys, they can be tracked and managed from a single place.

1. Calibrator Health partners with reputation.com to deliver seamless patient relationship and reputation management. PR Newswire. prnewswire.com/news-releases/calibrator-health-partners-with-reputationcom-to-deliver-seamless-patient-relationship-and-reputation-management-300449650.html. Published May 02, 2017. Accessed December 17, 2019.

management, other great services are available as well. For more information, see *Taking It One Step Further: Online Reputation Management*.

We're also able to share positive feedback from their surveys as reviews on our marketing site, formatted specifically to improve our ranking in Google search results and even earn our listing star ratings. Google search crawlers love fresh content, and, because we're publishing reviews that haven't been anywhere else on the web, we get a constant boost in search engine optimization.

THE SECOND STEP: IMPROVE THE EXPERIENCE

An equally important piece of the patient experience is knowing how to distribute insights to your staff, especially when you manage teams in different locations. Negative feedback must be shared with the staff, but positive feedback must also be communicated

regularly. This will boost morale and keep your providers engaged. Sharing feedback also increases productivity, decreases burnout, and gives staff members the tools they need to improve the overall patient experience.

One way to accentuate the positive is by letting patient experience tools do the heavy lifting. The Calibrator software can deliver feedback on problem areas, giving providers and staff a chance to turn their performance around before site managers ever have to sit down with them. Continuous automated feedback, backed by real-time evidence, creates the foundation for better dialogue with providers. And it means that one-on-one meetings with providers can be more focused on getting their feedback, rather than delivering yours.

Unifying culture is challenging in a large organization with multiple clinics. In this case, it's often the providers, more so than the senior leadership

team, who establish localized culture for patient centricity and engagement.

MAKE IT A PRIORITY

The patient experience is a top priority at Williamson Eye Center, and, thanks to Calibrator Health, we can easily see who on our team is delivering a fantastic experience and who isn't. We measure the patient experience at every interaction and make sure everyone on our team knows the difference between our happy patients and our unhappy ones.

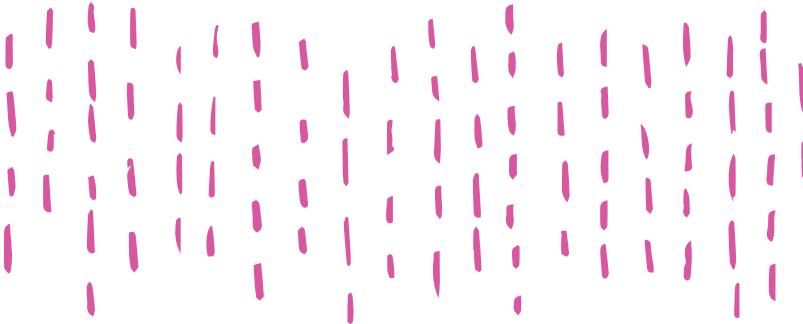
Calibrator Health has introduced transparency and accountability to our organization and has helped us get noticed online. This is the perfect solution for ophthalmologists looking to provide the highest-quality patient experience and grow their practice.

1. ROI showdown: SMS marketing vs. email marketing. Campaign Monitor Blog. January 18, 2019. campaignmonitor.com/blog/email-marketing/2019/01/roi-showdown-sms-marketing-vs-email-marketing/. Accessed December 10, 2019.

2. Data on file with Calibrator Health.

CheckedUp: Actively Engaging Patients

BY RICHARD M. AWDEH, MD


*S*am in the unique position of being both a practicing ophthalmologist and the founder of a patient education company. Born from my dual professional

responsibilities is a unique perspective on patient care. I believe that the use of patient education technology can improve patients' experience of ophthalmology in general and of your own practice in particular.

BACKGROUND

Nine in 10 patients say technology provides a valuable educational experience.¹ I created CheckedUp in 2012 as a technology platform designed for specialty point-of-care



Figure 2. CheckedUp monitors placed in the waiting room (A) and examination room (B) serve specific purposes.

patient education. My idea was to design software that could actively engage patients, caregivers, and physicians in the waiting room, in the examination room, and at home. I wanted to create better patient education materials so that physicians could easily educate their patients and so that patients would become confident and active in their decision-making process.

The goal of CheckedUp is to empower physicians and patients to make better health decisions together at the moment that matters most. The platform engages patients before, during, and after visiting a medical practice by using a variety of digital touchpoints. Each touchpoint, including Explorer Waiting Room TV and Consult Digital Exam Room Wallboard (Figure 2), is geared toward helping patients make crucial decisions about their treatment.

A CLOSER LOOK

About 75% of health care professionals say patient requests influence their treatment decisions.² In the waiting room, you can build your patients' awareness by playing specialty-specific educational content on large digital TVs like Explorer Waiting Room TV as they wait for their appointments. The

programming includes interactive video, relevant and engaging health content that is updated regularly, practice information and premium treatment options, and branded and unbranded ads. Physicians can customize their devices to include physician biographies, promote their procedures and services, and provide other desired custom content.

In the examination room, the Consult Digital Exam Room Wallboard facilitates patient-physician dialogue with interactive visualization and real-time annotation. This software can be used to describe conditions to patients and to educate them about their surgery and treatment options. The touchscreen wallboard allows physicians to zoom, rotate, and annotate 3D anatomic renderings and diagrams, which can be shared with patients via email. The software includes more than 75 diagrams, videos, and 3D images. With informational content and interactive diagrams, physicians can provide in-depth views of difficult concepts, conditions, and treatment options.

In the immediate postoperative period, patients receive custom emails with the annotated visuals and educational content that were discussed at their appointment. By further reviewing the content at

home, patients are better prepared to make final treatment decisions.

The CheckedUp platform also helps to drive incremental revenue in your practice. In a 2017 analysis of our CheckedUp member profiles,³ 28% of practices that used the service had seen an uplift in the adoption of premium services and procedures, with approximately a 2.6-fold increase in conversion rates. These surgeons had also experienced a twofold increase in the number of procedures they performed. Lastly, 98% of patients who experienced CheckedUp programming reported that they felt better educated and more prepared for their visits.

CONCLUSION

CheckedUp is an example of educational software that helps physicians and their staffs engage with their patients, elevating the patient experience in the waiting room, examination room, and even the patient's home. By using products such as Explorer Waiting Room TV and Consult Digital Exam Room Wallboard together, physicians can expand the care they provide and increase the likelihood of patients selecting a premium procedure.

1. Data on file with The Nielsen Company.

2. Consumer Insights, 2014.

3. Data on file with CheckedUp.

MDbackline: A Just-in-Time Approach to Patient Information

BY JOHN P. BERDAHL, MD

We like to think we're giving our cataract and refractive patients the best possible outcomes and surgical experiences. We like to think that, if we don't hear from them in between their postoperative follow-up appointments, they're happy and content with their new vision.

But do we really know if we've identified patients who are the best candidates for premium IOLs? Knowing who these patients are before they even walk through our doors benefits not only the patient but our practice as well.

Our goal with premium and standard lenses is not only to provide outstanding postoperative vision but also to ensure that patients believe they have made the best choice to achieve their visual goals. How do we know that we've accomplished that objective? The last thing I want to do is unknowingly send unhappy patients out into the community or back to their referring doctors.

If we know about dissatisfaction, we can almost always fix it. But it's my experience that patients often don't report negative perceptions unless specifically asked during follow-up visits.

So how do we learn about dissatisfaction? Patients need more consistent follow-up and more productive interactions with the physician and staff that go beyond the examination room. What if we could deliver the right information to patients in the right moment preoperatively so that they can make well-informed, unhurried decisions about their personal visual goals? We should, of course, always educate patients about all the options they have in cataract surgery, but it can be a better conversation when they have had some pre-education.

JUST-IN-TIME INTERACTIONS

We started using MDbackline in early 2019 as a way to gauge patients' interest in premium lenses and to learn how they are doing after their office visits or surgeries. This cloud-based, secure online system automates our contact with patients before and after office visits and surgery to educate them, provide customized coaching, and collect data for the meaningful-use aspects of our health care system.

The concept of just-in-time management is used in manufacturing where companies order parts and materials

only as needed to keep their inventories lean and costs down. MDbackline provides just-in-time information to our patients; returns just-in-time information to us, helping us to streamline the surgical experience for patients; and provides just-in-time delivery of patient information throughout the patient's journey. We can deliver these bits of information and education in small doses on a timeline we specify, so that the process is easy for the patient to understand.

For example, in a video that patients receive before their consultation, we explain what a cataract is and the options that the patient will face (see *Watch It Now*). This video reinforces that our patient's decisions will depend on how they want to

Courtesy of MDbackline

Visual Profile Report																																																		
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Information presented for illustration only. Medical decisions must be based upon an exam and clinical judgment.
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Figure 3. MDbackline's Visual Profile Report. (Note: This is a fictitious representation of a potential premium IOL patient. Responses are for illustrative purposes only.)

use their vision for the rest of their lives. We send this out 2 to 3 weeks before patients come in, so that they have time to think about what type of vision they want or need postoperatively.

Once patients have made the decision to proceed with surgery, they receive a preoperative preparation video, reassuring them that getting nervous about surgery is normal and emphasizing that they should reach out to us with any concerns about the surgery or the preoperative drops we've recommended. We send out another video within the first 3 months postoperatively, supporting patients as they get used to their new vision and reminding them to report any abnormalities they may notice to their optometrist or our offices (the software automatically alerts our offices when a patient reports an issue). Finally, we send a thank-you video in which we reiterate just how honored we are to have helped patients with their vision.

MDbackline works in the background of an electronic health record system; it securely sends emails from our office asking patients for feedback. Preoperatively, the software

asks specific questions to help us determine patients' interests and visual needs. Postoperatively, it asks about treatment efficacy and helps our staff identify patients who perceive subpar outcomes. This feedback helps me determine which treatments are best for which types of patients. The system also encourages patients to review their experiences online at sites such as HealthGrades, where positive reviews help build our referrals. And it gives us outcomes data in real time.

NEW OPTIONS

Our group recently started to implement MDbackline's Vision Profile Report. This upgrade allows our practice to invite cataract patients to take a brief preoperative vision survey, ascertaining variables such as where patients face visual challenges, what their vision habits are, and how motivated they are to be spectacle-free.

The report tracks which of the suggested educational videos the patient has opened and viewed and allows patients to add personalized comments, such as what they're concerned about or what ocular issues

► WATCH IT NOW ◀

In this patient education video, practitioners at Vance Thompson Vision describe what a cataract is.



→ YOUTUBE/BUYV7RHZESM

they have. The algorithm then helps us determine the probability that a given patient will benefit from and have a successful outcome with a premium lens (Figure 3).

CONCLUSION

Adding MDbackline into our practice has meant that we can be responsive to our patients in a timely manner. It allows us to provide patients with knowledge they need to make informed decisions about their future eyesight without overwhelming them with information. This, in turn, has made patients more comfortable with the overall surgical process and more confident in having chosen our practice as their surgical provider.

Ocular Innovations: Patient Referral Programs, Educational Videos, and More

BY ROBERT J. CIONNI, MD

*J*ncreasingly, collaborative care, or comanagement between optometrists and ophthalmologists, is becoming an accepted mode of practice. In this world of collaborative care, ophthalmology practices often struggle to

obtain and maintain healthy, patient-centered referral systems. This type of system is vital for practices that focus on cataract and refractive services because referrals from other doctors and previous patients are the lifeblood of these types of practices.

How can you create a system to make the referral process simple for the referrer—whether that is another doctor or a happy patient—as well as the patient being referred?

We've found a solution that works for us in Ocular Innovations, a referral platform that provides tools to make

Figure 4 and 5 courtesy of Robert J. Conn, MD



Figure 4. Touch card for referral. The QR code will link the patient to an associated video.

the referral process easy, short patient education videos to prepare patients for what's to come, and a simple way for patients to review and rate our practice once their procedure is complete.

SIMPLIFYING PATIENT EDUCATION

Ocular Innovations leverages a device that patients always have with them—their smartphones. Referring doctors can educate their patients on our practice and the procedures

► WATCH IT NOW ←

Keyword: Ocular MB
Text to: 72000



→ WWW.OCULARINNOVATIONSINC.COM

that we offer by providing them with a touch card customized to their practice (Figure 4). Patients begin the process by simply pointing their phone's camera at the Quick Response (QR) code on the card. The patients then immediately receive a text message with a brief video introduction from the practice, which features our surgeon thanking the referring optometrist by name. Our referring doctors love how this showcases a feeling of continuity and trust between our practices.

Patients also receive a short video overview of our consultation process and what they can expect on the day of their appointment. Throughout the patient journey, patients are automatically sent educational content via text messages over multiple days. Preoperatively, the content describes what they should do to prepare for surgery. Postoperatively, patients receive reminders about their drop schedules, appointments, and do's and don'ts to observe during the recovery period (Figure 5).

This entire process is achieved without the need for patients to use email, download an app, or create a login or password, making it a user-friendly experience for the referring physician and the person who is referred. The benefits of this education are twofold: Before surgery, patients are more comfortable and better prepared when they come to see us. After surgery, teams can expect to handle fewer triage calls because patients have instant access to the answers they need.

CAPITALIZING ON PATIENT EXPERIENCE

Following the surgical procedure, at the time when patients are in their height-of-delight moment, we use the Ocular Innovations platform to invite them to rate their experience with us. This is also done via a text, QR code scan, or a near-field communication tap of the patient's phone on a small

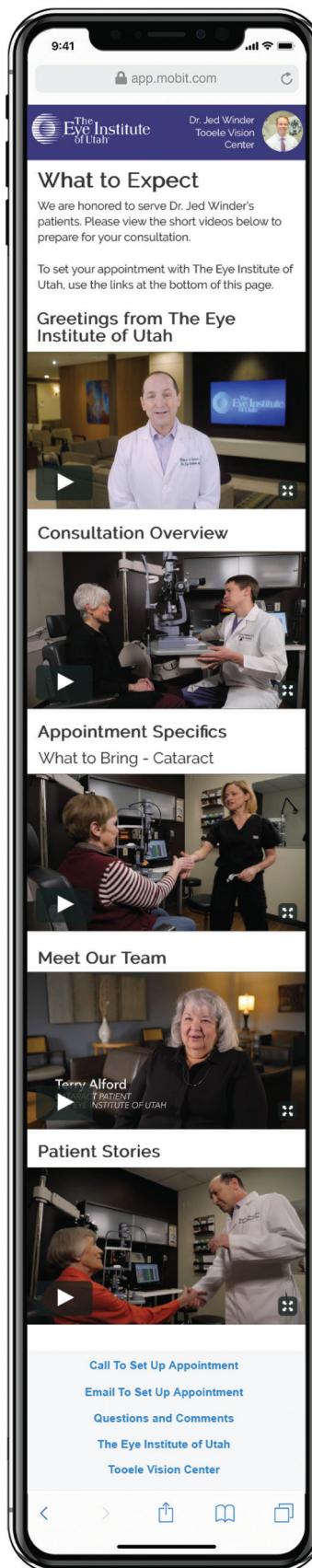


Figure 5. Example of videos that patients can access with a smartphone.

review sign. The mobile platform then takes patients directly to a rating and review page, making it easy for them to rate the practice. In the few months we have been using Ocular Innovations, we have seen

our five-star ratings grow tenfold, from an average of two per month to 20 per month.

From introducing patients to our practice, to educating them before and after their procedures, to even helping

them publicize their happiness via five-star reviews, the Ocular Innovations platform has paved the way for our practice to increase and accelerate conversions on every step of the patient journey.

Rendia: A Simplified Pre-Education Process

BY DARRELL E. WHITE, MD

Rorough patient education is crucial in today's ophthalmology landscape, where patients have high expectations and an ever-increasing number of procedures and technologies to choose from in the hopes of achieving excellent visual outcomes.

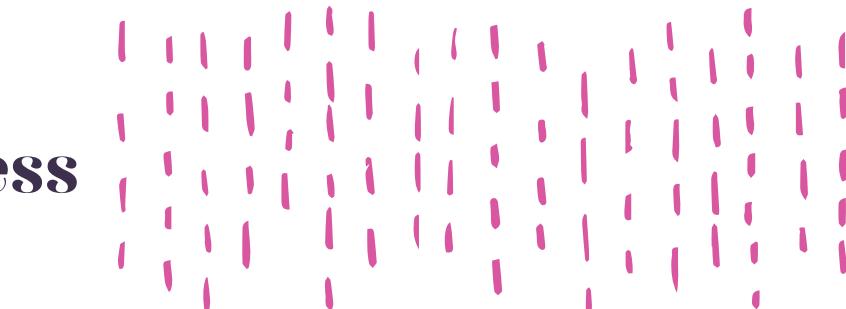
One of the best decisions I made when I opened Skyvision Centers was to invest in an interactive patient education software solution, Rendia, that allows me to educate my patients effectively and efficiently. Most important, this supplementary tool has helped me to better connect with my patients, so that we can work together to make well-informed decisions about their eye health.

People learn in different ways. Some people learn by listening, some by reading, and others by seeing. Generally speaking, people tend to recall things better when information is presented in two different ways. An interactive patient education solution such as Rendia is valuable because it combines written information with a visual learning experience. Our practitioners then add a third, verbal component during initial consults and patient examinations to achieve optimal patient understanding.

DUAL-PURPOSE SOFTWARE

Rendia can be used to educate patients prior to their appointments. Once a patient contacts our practice, he or she is sent an email with a direct link to a website branded for Skyvision (Figure 6) that provides a playlist of animated videos on the specific condition or disease that caused the patient to book an appointment.

For new patients, we send a link to a video that talks about the eye and what happens during an eye examination. The animated video prepares them for different facets of the



Figures 6 and 7 courtesy of Rendia

Figure 6. Patients receive an email from Rendia with a direct link to a website branded for the specific practice a patient is visiting.

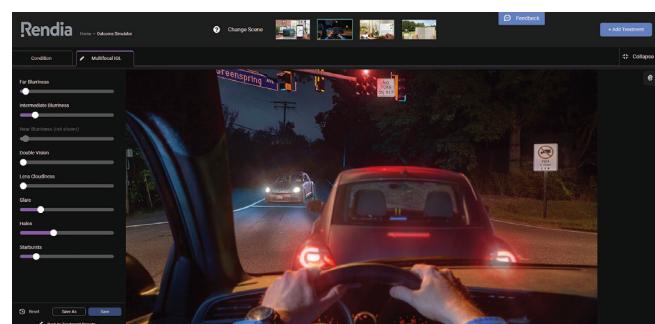


Figure 7. Rendia simulation of patients' vision with various lenses.

examination, such as having their pupils dilated. To those of us in the eye care community, pupil dilation is standard procedure, but many patients are surprised by pupil dilation and unsure of what is involved. When they aren't aware of how it is performed beforehand, they are more likely to become nervous during their appointment.

Similarly, patients who call about cataract surgery are directed to Rendia's cataract animations, which provide information on what a cataract is and what the cataract

surgery experience will be like and encourages patients to consider their lifestyle and desired outcomes after surgery. Patients can see a simulation of their vision with various lens options to make a confident decision (Figure 7).

Providing pre-education resources such as these is beneficial for two main reasons. First, it helps us to ensure that our patients learn about eye health from an accurate and reliable source, rather than a less-credible website, and it helps prepare them for what they're going to encounter in the office. Second, it affords patients the privacy to learn about their conditions in their own home, freeing them from experiencing an initial shock at their first appointment. This way, when

patients come to the office, they are ready to talk about their issue and how you're going to take care of it.

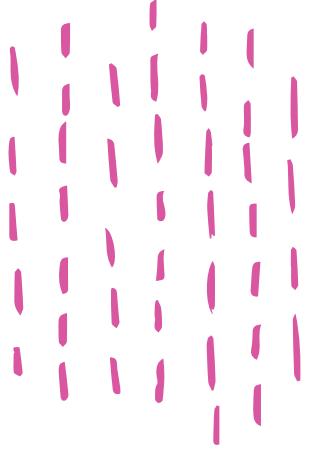
Rendia can also be used after patients' visits to reinforce everything that they learned during their appointment. As part of our follow-up process, our technicians send patients educational videos that review the discussion they had during their appointment and reinforce the decisions made. This can be done directly from the computer in the examination room.

A RICH PAST AND A NOD TO THE FUTURE

One unique thing about Rendia is that the DNA of the company is in

eye care. The company was founded by a family of optometrists who saw a need for patient education in eye care and developed a robust library of condition- and treatment-specific content to fill that need. Building on its rich past, Rendia is currently working with electronic health record companies to create seamless integration with their software programs.

Rendia is an all-encompassing educational experience for patients, and it has been a vital part of how we at Skyvision have interacted with our patients from day 1. This tool is the cornerstone of how we educate our patients about the nuances and complexities of eye care.



SurgioRithm: Personalizing Recommendations and Increasing the Efficiency and Productivity of Cataract Evaluations

BY TERRENCE J. DOHERTY, MD; AND JAMES C. LODEN, MD

Today's cataract surgery patients vary greatly in age, activity level, and desire for spectacle-free vision, and cataract surgeons have increasingly more options to offer them. Matching a patient's desired experience and visual outcome with the latest technology while appropriately managing their expectations is something that cataract surgeons must master if they want to deliver a premium experience.

But in their efforts to understand patients' visual needs, surgeons can

find themselves bogged down in lengthy conversations with talkative patients. The resulting longer chair times can create delays in the flow of clinic. A frustrated surgeon who becomes impatient can have the tendency to shorten a conversation by advising the patient not to consider any premium options. On the other hand, a poorly informed or confused patient is not likely to consider any additional out-of-pocket investment for a premium product. Some may even reconsider having cataract surgery altogether.

A BETTER FORM OF PATIENT EDUCATION

Patient education software offered by SurgioRithm can be a great way to solve these dilemmas. It allows your practice to invite patients to complete an at-home preparation session via a secure email link or an abbreviated phone survey.

The software uses a series of simple questions and statements to analyze patients' visual needs and lifestyle preferences. During the preparation session, the software also assesses patients' level of perfectionism and their willingness

Courtesy of Terrence J. Doherty, MD

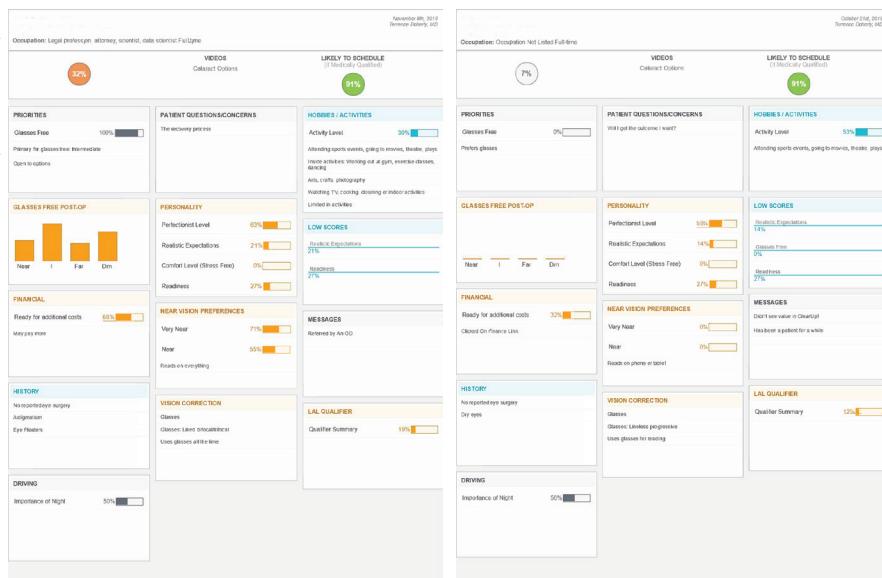


Figure 8. SurgioRithm's insight printouts of two patients' response items. The patient on the left indicated a high interest in spectacle-free vision and readiness to consider additional costs. The patient on the right does not seem to mind wearing spectacles and does not want to incur additional costs. Helpful information about personality, hobbies, and visual preferences is also displayed on the printouts.

to consider additional out-of-pocket costs. Afterward, patients have the option to click on links that play informative videos or that direct them to your practice's website, where they can learn more about their surgeon and get information about other areas such as financing options. The entire process is customizable.

The second major benefit of SurgioRithm is the feedback loop it provides to the surgeon. Information from the at-home preparation session is presented on a printable online dashboard that includes color-coded bar graphs and percentages (Figure 8). The categories are separated into individual boxes that can be arranged in any order and include things such as the patient's priorities, financial situation, hobbies, and vision preferences. The SurgioRithm software can also notify the surgeon to which patients clicked on the financing link; we have found this information to be very helpful.

Lastly, SurgioRithm also helps the practice keep track of the number of

patients who book surgery and how many of them upgraded when given a premium recommendation. This can help the practice to measure and improve its revenue from premium options.

ADDING A PERSONAL TOUCH

Armed with this information, we feel that we can greet our patients in a personalized way, knowing more about their backgrounds and having an idea of how likely a given patient is to choose a premium product. This makes our evaluations much more efficient and productive. It also just feels more personal to be able to ask a patient, "Would you like to be able to cycle and snow ski without having to wear glasses?" or, "I see that you like photography; do you have to wear your glasses for editing?"

In our practice, we begin each patient conversation by thanking the patient for taking the time to fill out the SurgioRithm information ahead of his or her appointment, and we try our best to make the patient feel that

it was worth the time he or she spent completing it.

Using this software has improved our interactions with patients, and it helped to make many patients more likely to consider an upgraded option. ■

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