

LESSONS LEARNED FROM EARLY ADOPTERS

Assessing the Strategic Benefits of Robust Virtual Triage

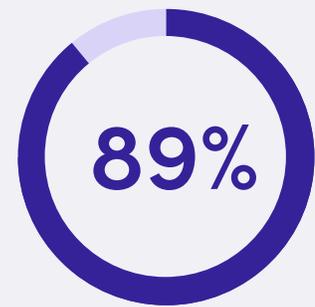
Our consumer-focused society has primed us to expect highly personalized and convenient experiences in every facet of our lives, and healthcare is lagging behind.

As health systems struggle to retain patients and staff, finding digitally-sophisticated and easy-to-use solutions to improve patient and provider experiences is crucial to future success.

A natural first step is deploying solutions that meet patients where they are—when they're shopping for care online, before they step into a facility. Doing so is a win-win for patients and healthcare organizations as patients have convenient access to quality care from the comfort of their homes and on their own devices, while organizations can garner their trust and lessen their staff's workload.

Taking that a step further, when health systems deploy virtual triage solutions to route their patients to the most appropriate care, they offload low-value care from overextended care teams, increase throughput and revenue, and generate higher margins, measured as the average work relative value units (wRVUs) that determines payment for most ambulatory care.

Considering that **89% of patients search for their symptoms online before seeking healthcare guidance or connecting with their provider**, it's never been more critical to provide patients with comprehensive and clinically robust virtual triage technology to provide timely, helpful, and accurate care and advice.



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HEALTH SYSTEMS MARKET ADOPTION OF ONLINE SCHEDULING & AI VIRTUAL ASSISTANTS IN 2023

After analyzing the public websites and web applications of the top 647 health systems in the United States, we found that they are making significant strides in adopting digital self-service solutions to meet rising consumer demand for convenient, easy access to the health care resources they need.



Inclusion Criteria

A cohort of 674 health systems from Definitive Healthcare’s complete list of U.S. hospitals and health systems with at least \$250M in Net Patient Revenue was curated using the following criteria:

- ✓ Hospitals or regional systems in an Integrated Delivery Network (IDN) with a shared, consolidated web experience were only counted once.
- ✓ IDNs with distinct web experiences for each hospital/system were counted individually.

RESEARCH APPROACH

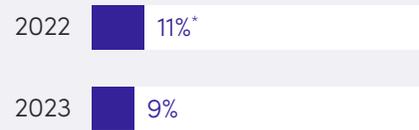
Clearstep analyzed each of the 647 health systems to document the following digital self-service capabilities:

- 1 How many have enabled standard or robust online scheduling?
- 2 How many have implemented a chatbot/virtual assistant on their website and/or web applications?
- 3 If a health system has implemented a chatbot, is it used for:
 - COVID-19 Virtual Triage (i.e. a temporary and narrowly focused symptom screening and navigation to appropriate care endpoint for COVID risk)
 - Virtual Triage for any symptom (i.e. online triage for any combination of symptoms or clinical conditions to route patients to the right point(s) of care across the health system)
 - Patient Services support (i.e. administrative, non-clinical workflows that help people find information, doctors, prescription support, billing information, etc.)

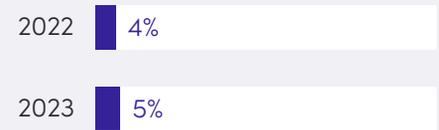
Adoption of public-facing online scheduling



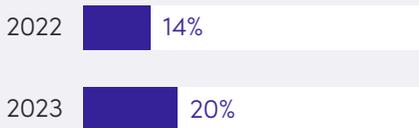
Adoption of any virtual triage AI assistants



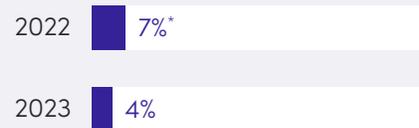
Adoption of robust virtual triage AI assistants



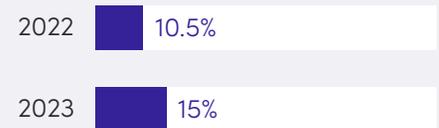
Adoption of robust online scheduling, including specialist appointments



Adoption of COVID-19-only virtual triage AI assistants



Adoption of patient services AI assistants



Our analysis revealed that 74% of health systems adopted public-facing online scheduling, of which 20% have adopted robust online scheduling, including specialist appointments—**both increased from 2022.**

The overall usage of any virtual triage AI assistant decreased by 2% YoY, largely due to the deactivation of COVID-19-related virtual triage services. However the implementation of robust virtual triage AI assistants saw a YoY increase to 5% and the implementation of AI assistants for patient services saw a YoY increase to 15%.

These numbers demonstrate the shift health systems are making from reactive virtual solution adopters (due to the pandemic) to proactive, strategic implementers of solutions that deliver value toward their organization’s key objectives—such as increased patient access, routing patients more efficiently, automating common patient requests/services, delivering autonomous and enhanced patient experiences, and operating more efficiently overall.

Traditional Triage: Current Challenges

Triage is a crucial process that determines the urgency of patients' conditions. However, in many healthcare settings, limited resources, lack of access, and time constraints lead to inefficiencies, errors, and missed opportunities to provide quality care.



LIMITED RESOURCES

Many healthcare organizations are strained due to shortages of qualified professionals, equipment, and facilities—leading to long wait times, delayed diagnoses, and overcrowded emergency departments.



LACK OF ACCESS

Many people, especially those in rural or underserved areas, face challenges in accessing healthcare services for a variety of reasons:

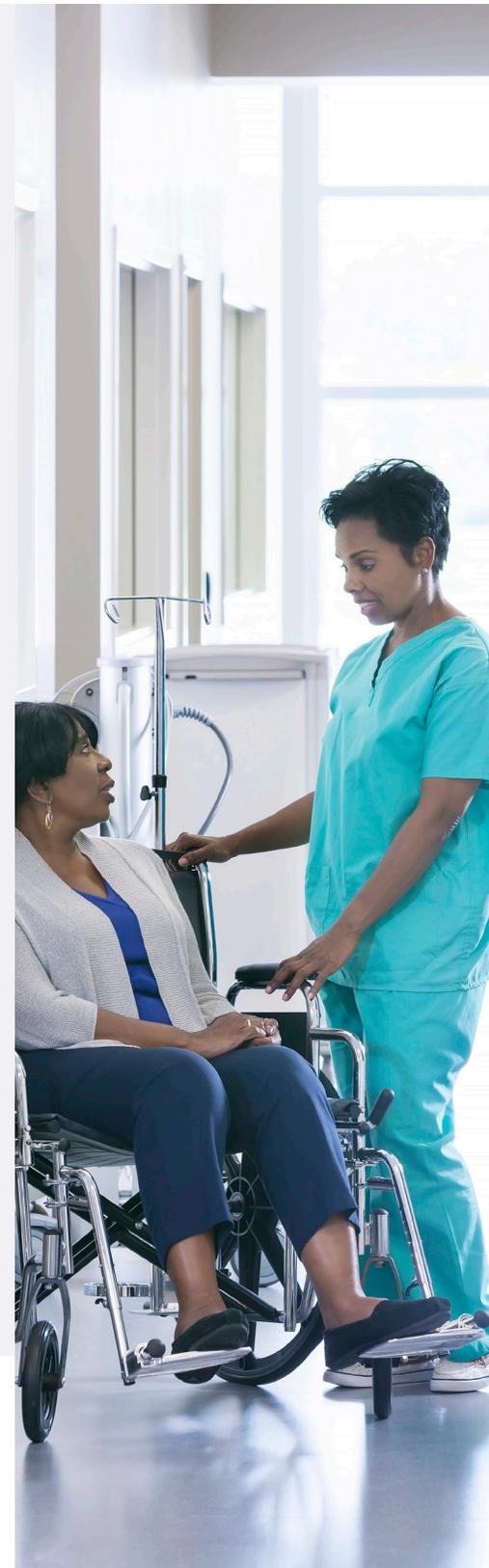
- Lack of reliable transportation
- Living far away from the closest healthcare facility
- The rising cost of receiving care

These inequities result in many patients who live within these communities delaying or foregoing medical treatment.



TIME CONSTRAINTS

Healthcare professionals are experiencing increasing pressure to see a specific amount of patients within a particular length of time, making it challenging to provide prompt and in-depth care to every patient. These time constraints can lead to rushed assessments, increased chances of errors, and decreased patient satisfaction.



Four Opportunities for Improvement Using A Virtual Triage Solution



Healthcare organizations that implement a robust virtual triage solution can enhance patient access, unlock their care team's capacity, increase throughput and revenue, and generate higher wRVUs.

1 ENHANCE PATIENT ACCESS

Virtual triage solutions allow healthcare organizations to meet their patients where they are, even if they live in remote or underserved areas. As long as a patient has an internet connection, they can receive timely medical advice and determine if further in-person care is required.

2 UNLOCK CARE TEAM CAPACITY

Implementing a virtual triage solution can automate and streamline the triage process. The system can quickly and accurately assess the urgency of cases by analyzing patient symptoms, medical histories, and risk factors.

By offloading low-value care that's easily handled virtually without an onsite visit, there's more capacity for higher-value cases that require a physical appointment. These complex cases are often more stimulating and rewarding for clinicians and care teams.

3 INCREASE THROUGHPUT AND REVENUE

Offering patients an easy-to-use and convenient virtual triage solution creates efficiencies for health systems and allows them to interact with thousands of people at scale without human intervention. Faster, more efficient triage helps to reduce waiting times and optimize patient flow. As a result, healthcare organizations can handle a higher volume of patients within a given timeframe, increasing throughput and revenue potential.

4 GENERATE HIGHER AVERAGE wRVUs

Because AI-powered virtual triage solutions can accurately assess the urgency and severity of patients' symptoms and route them to the best care option, organizations can avoid having a large number of patients with low acuity cases coming into their emergency departments or booking an onsite visit. Higher acuity cases have a higher average wRVU for the same unit cost, resulting in a higher visit margin.

Additionally, because virtual triage solutions can automate administrative tasks such as data collection, documentation, and scheduling, healthcare professionals can allocate more time to direct patient care.

What to Look Out for in a Virtual Triage Vendor

Selecting a virtual triage vendor is a significant decision for healthcare organizations seeking to enhance their care delivery and patient experiences. As you search for the right vendor for your organization's specific wants and needs, you may want to look out for these key factors.



SAFELY AND ACCURATELY LEVERAGES ARTIFICIAL INTELLIGENCE (AI) AND LARGE LANGUAGE MODELS (LLMs)

Selecting a virtual triage solution vendor that **knows how to safely leverage the power of AI and large language models (LLMs) for accurate care routing** is crucial for optimal patient care.

While some vendors may use AI and LLMs within their virtual triage solutions, it's important to ensure they're using it in a way that facilitates timely, helpful, and accurate care.

SEAMLESS INTEGRATION INTO EXISTING SYSTEMS

Selecting a vendor whose virtual triage solution can seamlessly integrate into your existing systems is crucial for accessing appointment inventory and clinical logic needed for care routing.

Seamless integration enables the virtual triage solution to securely exchange data with your electronic health records (EHR) system, allowing for accurate and timely transfer of patient information. This streamlines workflows, minimizes data entry errors, and promotes continuity of care.

WHITE LABEL CAPABILITIES

It's also advantageous to select a vendor who offers white label capabilities, as white labeling allows healthcare organizations to maintain a consistent and cohesive brand image across all patient touchpoints. Ultimately, this consistency reinforces brand identity, strengthens patient trust, and creates a better, less complicated patient experience.

CONFIGURABLE CLINICAL LOGIC AND ROUTING TO CLINICAL RESOURCES

Look for a vendor who allows you to configure care protocols, algorithms, and decision-making processes within their virtual triage solution. Ensure the system aligns with your organization's existing clinical workflows, preferred clinical guidelines, and best practices to reflect your unique approach to care and minimize disruption.

Flexible configuration enables you to address specific patient populations, specialty areas, or unique care pathways—ensuring the solution remains accurate and effective in meeting your changing needs.

USING AI AND LLMs FOR ENHANCEMENT AND MAINTENANCE

Look for a vendor who uses LLMs to continually learn from user interactions, feedback, and real-world outcomes. This iterative learning process helps refine their system's **accuracy**, adapt to new medical knowledge, and improve over time. It ensures that a triage solution will stay up to date with evolving healthcare practices and provides the most accurate assessments.

Additionally, it's important to find a vendor who integrates LLMs into existing clinically validated responses and manually verifies responses to any previously unseen patient questions.

Top Considerations When Sourcing RFPs for Virtual Triage Solutions

Once you find a virtual care solution you want to learn more about, you may send a request for proposal (RFP). This process will help you obtain more in-depth details about a solution to gain a better understanding of how it works in action.

However, if you don't ask the right questions, you may choose a solution that's not the right fit for your organization's needs and goals.

To help you during your next RFP process, we've outlined goals, requirements, and questions to ask a vendor regarding security and compliance, patient engagement and experience, scalability, clinical accuracy and quality, analytics, and customer service.

INTEGRATION

GOAL

Ensuring a vendor is able to integrate with your existing technology.

REQUIREMENTS:

- 1 Ability to integrate with EHR, scheduling, telephony systems, live-chat solutions, etc.
- 2 API access to technology

QUESTIONS TO ASK

- ✓ How much experience do you have integrating with {insert technology}?

ANALYTICS

GOAL

Ensuring you will have access to insights and trends from usage of the vendor's solution.

REQUIREMENTS:

- 1 Access to or ability to export data from solution

QUESTIONS TO ASK

- ✓ What analytics do you provide your customers?
- ✓ Are we able to extract data from the solution to import into our own analytics?



CLINICAL ACCURACY AND QUALITY

GOAL

Providing assurance that a vendor's clinical logic for routing patients meets the standards of your organization.

REQUIREMENTS:

- ① Vetted clinical logic for routing patients
- ② Ability to review clinical logic and provide feedback, if necessary

QUESTIONS TO ASK

- ✓ How much ability does the customer have to change clinical logic?
- ✓ What is the process for creating clinical logic? Who creates the logic?
- ✓ How often is clinical logic reviewed?
- ✓ Is the clinical logic derived from the same gold standard content used in the existing call centers?

CUSTOMER SUCCESS

GOAL

Ensuring a vendor provides a superior customer service experience.

REQUIREMENTS:

- ① Defined service level agreements (SLAs) for engagement
- ② Clear processes and timelines for engagement and implementation

QUESTIONS TO ASK

- ✓ What types of product support will be provided?
- ✓ Is support provided 24/7?
- ✓ What are typical support response times?
- ✓ What types of alerts and monitoring are available for product performance?

PATIENT ENGAGEMENT AND EXPERIENCE

GOAL

Ensuring a solution allows you to engage with your patients in a meaningful way.

REQUIREMENTS:

- 1 Offered across several platforms (desktop, mobile, in-app)
- 2 Can appropriately understand a patient's symptoms and directly route them to the correct care
- 3 Offered in both unauthenticated and authenticated experiences to allow for more reach
- 4 Addresses both clinical and non-clinical requests from patients
- 5 Design is visually appealing

QUESTIONS TO ASK

- ✓ What are any other consumer engagement offerings beyond chatbot?
- ✓ Does the solution offer a strong "guest experience"?
- ✓ How much control does the customer have over the product experience?

SECURITY AND COMPLIANCE

GOAL

Ensuring a preferred vendor meets your security standards.

REQUIREMENTS:

- 1 HIPAA Compliant
- 2 History of Security Audits (SOC 2, ISO 27001)
- 3 Response plan in the event of a security breach

QUESTIONS TO ASK

- ✓ Please describe your ability, certifications, and infrastructure that allow you to appropriately handle PHI/PII data.
- ✓ Is the solution HIPAA compliant?
- ✓ Is there a Written Information Security Program (WISP)?
- ✓ What is the IT Governance Framework?
- ✓ Are there annual SOC audits?

REFERENCES

GOAL

Understanding a vendor's experiences working with large healthcare organizations and how their current customers leverage the technology.

REQUIREMENTS:

- 1 Vendor has experience working with large, complex health organizations
- 2 Current customers report positive experiences with the vendor
- 3 A thorough understanding of resources needed from customer side to implement

QUESTIONS TO ASK

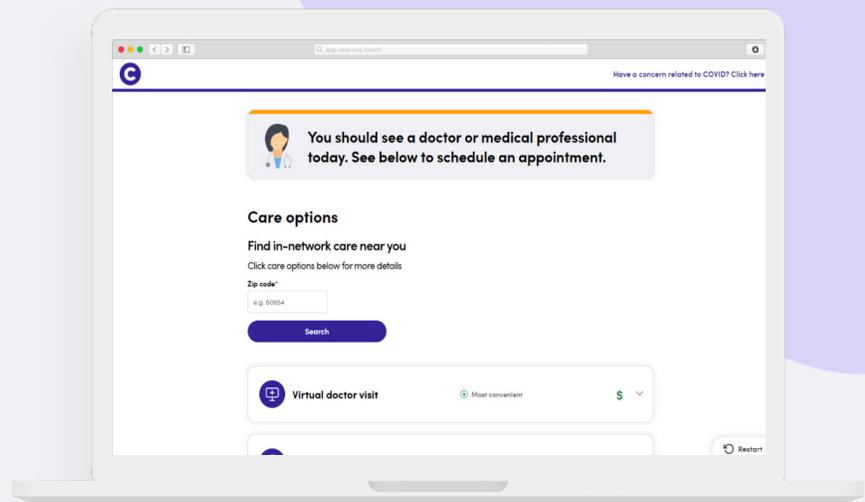
- ✓ Can you provide references for past implementations we can contact?
- ✓ Can you provide an overview of the implementation process?
- ✓ How many customers do you currently serve?

Leading the Way: Leveraging Virtual Triage Technology for Future-Ready Healthcare Organizations

Implementing **virtual triage software** represents a transformative opportunity for health systems to overcome industry challenges, improve patient outcomes, and enhance the provider and patient experience.

Carefully selecting a reliable and innovative virtual triage vendor ensures health systems find the right partner to stay ahead of the competition and fulfill their commitment to delivering high-quality, accessible, and patient-centered healthcare services in the digital age.

Clearstep's **Smart Care Routing™** can help your organization reach your virtual triage goals. Connect with us at info@clearstep.health for more information.



clearstep

Clearstep Virtual Triage guides patients' end-to-end healthcare journeys, delivers the superior digital experience today's patients expect, and creates significant operational efficiencies for integrated delivery networks.



Enhance
Patient Access



Enrich Patient
Engagement



Unlock Care
Team Capacity



Increase
Throughput
& Revenue



Generate
Higher Average
wRVUs

Interested in learning how Smart Care Routing™ can help your organization reach your virtual triage goals? Connect with us at info@clearstep.health

About Clearstep Smart Care Routing™

Clearstep's clinically validated, market-leading AI virtual healthcare assistant guides patient-consumers through the complexities of managing their health and care. Clearstep partners with health systems, hospitals, medical groups, retail pharmacies, population health organizations, and payers to activate technology on their websites, mobile apps, and patient portals.

Trusted by CVS Health, HCA Healthcare, Mount Sinai Health System, BayCare, Tufts Medicine, and health systems in 15+ states, Clearstep provides a consumer-centric experience that empowers patients to better manage their end-to-end healthcare journeys. Clearstep reduces administrative burdens for care teams by automating symptom checks, triage, common patient services, remote patient monitoring, and clinical workflows- ultimately improving efficiencies, experiences, and outcomes.

Learn more at clearstep.health

Trusted by leading healthcare organizations since 2018

