



## A Guide to Patient Recall: Preventive Care

Restore healthy habits by encouraging preventive care exams, screenings, and vaccinations.



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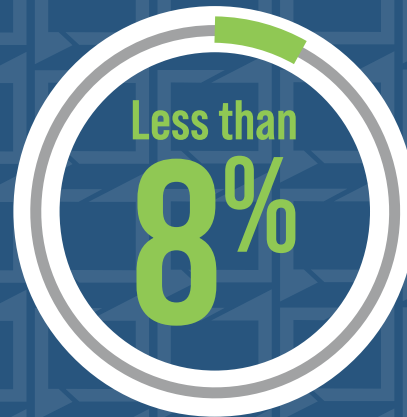


## The Importance of Recall and Reminder

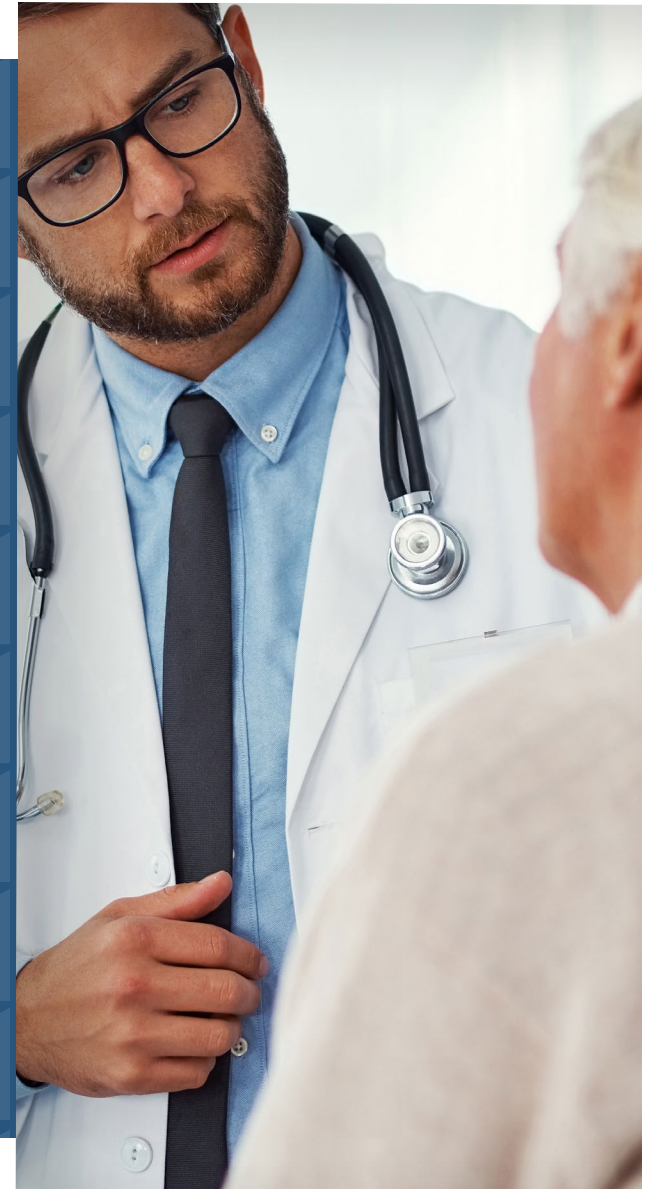
According to one study, less than **eight percent** of Americans are receiving recommended preventive services that have the greatest potential for improving health. This is too few patients engaging with important health screenings, which can negatively impact clinical outcomes.

Like many health system leaders, you may be striving to meet aggressive clinical, financial, and patient experience goals, all of which can be impacted by the utilization of preventive care and wellness services. Bringing patients back into the healthcare system for these visits can be challenging at the best of times, but it's especially difficult when your organization is facing staffing or resource constraints. Manual recall efforts involving chasing down patients and playing phone tag can be a serious drain on your staff's time and energy. And reminder postcards are both costly and ineffective. But there is an opportunity to leverage strategic, proactive digital engagement to up the efficiency of recall efforts and encourage patients to seek preventive and wellness care. This renewed focus on patient health outcomes can have far-reaching impacts on care outcomes as well as your organization's own financial health and sustainability.

In order to implement an effective digital engagement campaign, there are a few simple steps that can ensure patients are **reminded**, **reassured**, and **educated** about these services throughout the process.



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## Why Patients Skip Out on Prevention

To jump start these efforts, it's critical to understand why patients put off preventive care visits. These individuals need more than just encouragement and reassurance. They must also be reminded about the optimal timing and importance of preventive care, especially if these visits are long overdue, while being educated about their value. Consider the [top reasons](#) for non-compliance with these visits:



### Patients forget.

Almost one-third (28 percent) of patients don't know which services are recommended for them, and nearly one in four don't know when they are due for a visit.



### Patients are uncertain.

Patient hesitancy to schedule preventive services can often be due to access issues (20 percent report not knowing where to access care). In addition, nearly one in three individuals thinks they can't afford preventive care, even though many health plans cover these services with little or no patient cost.



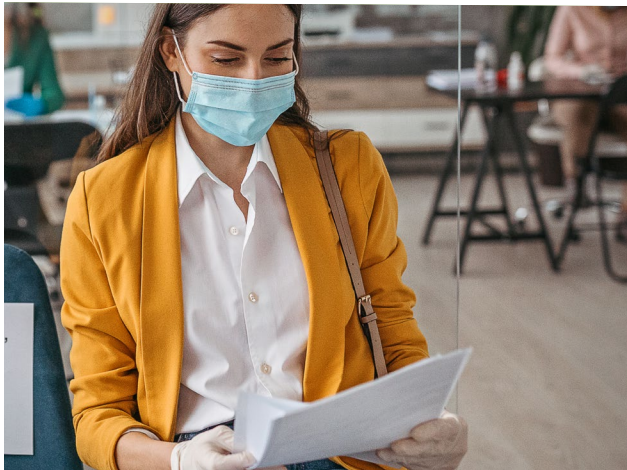
### Patients aren't motivated because they aren't sick.

Almost one-third (27 percent) of people only schedule a doctor's visit when they're sick. However, proactive screenings and regular physicals—even when an individual feels well—can diagnose conditions early and impact care outcomes.



## A Patient Engagement Strategy for Timely Preventive Visits, Procedures, and Immunizations

Understanding patient perceptions and potential barriers to preventive care can help you address these issues with a wide variety of people with different risk factors, demographics, and needs. Educating patients so that they feel reassured and confident in when and how to seek recommended services has the potential for a measurable improvement in health outcomes, a heightened patient experience, and bolstered revenue for your health system thanks to fuller schedules and higher visit volumes.



**With these goals in mind, your organization will want to act quickly to encourage patients to schedule vaccinations, annual exams, and routine visits. The following are just a few recommendations compiled from evidence-based research, public health resources, and industry best practices that can assist you. Together, these strategies can be deployed to create a targeted, timely, and effective preventive care campaign.**

# Patient Engagement Strategy

## 1 Use the latest evidence-based research and resources

The Community Preventive Services Task Force (CPSTF), a task force of the Department of Health and Human Services, has developed a variety of [recommendations](#) for patient outreach that promote prevention, from immunizations to cancer screenings. It also specifically recommends client reminder and recall interventions to increase [vaccination rates](#) in children, adolescents, and adults as well as for other patient services like [colonoscopies](#).

Below are just a few opportunities for impactful preventive care outreach:

- **Vaccinations** are an ideal patient engagement campaign topic given their ability to prevent many serious childhood diseases and their importance in health maintenance. Plus, preventing illnesses like the flu and COVID-19 helps to reduce the number of related hospital visits each year, especially important given staffing constraints post-pandemic. Even prior to the pandemic, [immunization rates](#) for some of these conditions, like measles, had room for improvement.
- **Routine preventive services** have a meaningful impact on quality of care and outcomes thanks to early detection and treatment of serious illnesses like cancer. These services include regular mammograms for women, prostate exams for men, and colonoscopies. Those three screenings alone impact a large portion of middle-aged adults. CDC data shows that about [30 percent](#) of Americans aged 50-75 are not up-to-date with colorectal screenings and nearly [one-quarter](#) of women aged 50-74 have not had a mammogram in the past two years.
- **Mental health screenings** may also be [more critical](#) now than ever. These screenings can be valuable in both adults and adolescents as research shows that [46 percent](#) of mental health conditions begin by age 14. Yet the average delay between when symptoms first appear and intervention is between [eight and 10 years](#). Screenings for mental health issues like depression and other conditions can narrow this gap and help ensure patients are seeking the support and treatment they need.



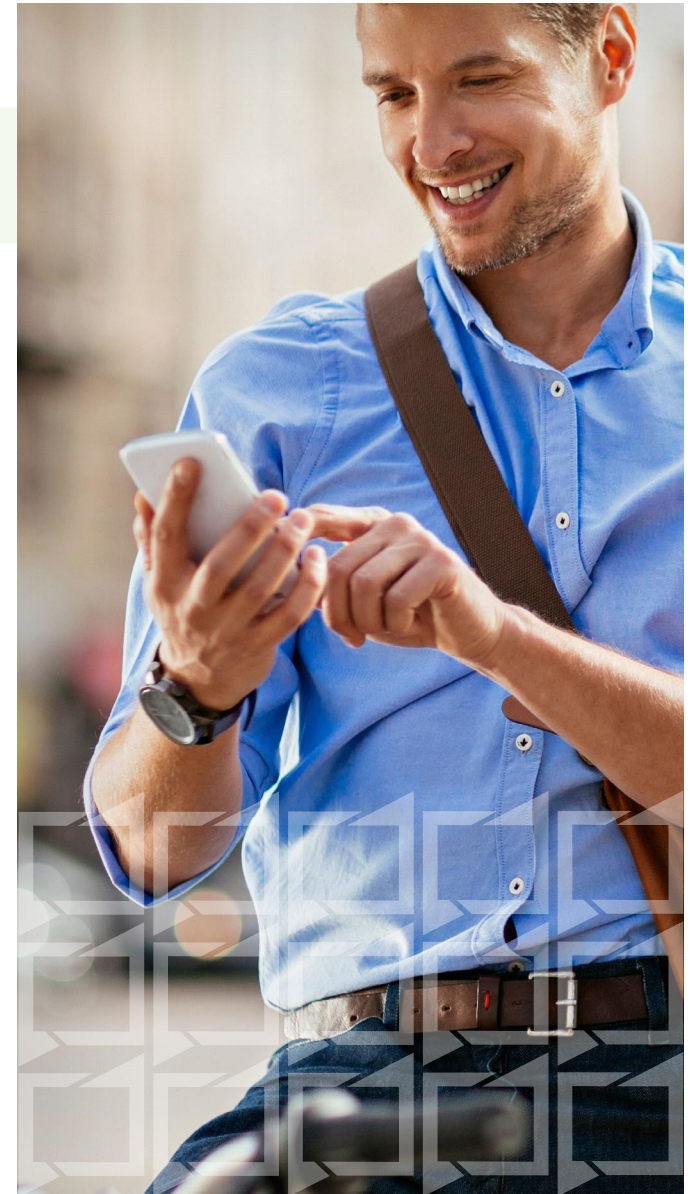
# Patient Engagement Strategy

## 2 Take advantage of today's technology to automate engagement

Your organization should be looking to the latest technology, including automated patient engagement systems, to optimize reminder and recall efforts. Automation can dramatically streamline and manage various reminders, scheduling, and rescheduling tasks by rapidly deploying SMS, phone, and email-based communications. It can even optimize time-intensive referral management workflows that may arise after a recommended preventive screening. Two-way, technology-enabled communications embedded into your existing electronic health record (EHR) can make these interactions closed-loop. This enables patients to respond to an SMS message and directly schedule or reschedule an appointment. This information is then written back to the EHR to document scheduling, outreach, and patient data. All of this can occur without any manual data entry or hands-on phone outreach.

### Benefits of Automation:

- **Saves your healthcare team's time**, relieving these individuals who are already overburdened and experiencing burnout.
- **Enhances care and the patient experience** by employing a multi-touch approach, which is valuable given that many patients need several reminders to motivate them to seek care (especially when they're feeling well).
- **Saves money and increases revenue** by eliminating mailed or manual phone outreach—including printing, postage, and staff time—while actually generating income thanks to higher visit volumes.





## Patient Engagement Strategy

### 3 Think multi-modal motivation

Studies show that leveraging multi-modal communications like phone, SMS text, and email can make a real impact on recall and reminder effectiveness. The most impactful campaigns will also state the benefits of a particular action, personalize messaging as much as possible, and provide opportunities to take this action and ask questions—for example via links, live transfers, and even self-scheduling.

Using a digital patient engagement platform, personalized messaging can be easily deployed at scale to help patients understand the facts about the safety of these preventive health and wellness measures, as well as their efficacy in preventing serious illnesses.





## Turning Preventive Care into Meaningful ROI

While immunizations, annual exams, and screenings are not necessarily high-dollar services, they can encourage patients to seek care, improving outcomes and even recall in the months and years to come. And prevention is a **large part** of accountable care, quality, and value-based care initiatives, which deliver bonus payments that can help bolster your organization's bottom line.

In a real-world example, this timely, technology-powered engagement approach has demonstrated meaningful return on investment for healthcare organizations of all sizes. In one example, a Northeastern OB-GYN practice leveraged automated patient engagement to reach patients due or overdue for mammograms. Based on \$150 in revenue per mammogram, the practice was able to gain approximately \$45 for every \$1 spent. In another real-world instance, a large Louisiana-based health system used automated SMS messaging to send scheduling reminders to patients with recent orders for colonoscopies. Of the 3,137 patients contacted, 578 scheduled their test by the conclusion of the campaign, achieving an incredible 18.4 percent conversion rate and generating nearly \$700,000 based on an average revenue of \$1,185 per procedure.



### Example #1: **Northeastern OB-GYN Practice**

Leveraged automated patient engagement to reach patients due or overdue for mammograms.

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Used automated SMS messaging to send scheduling reminders to patients with recent orders for colonoscopies.

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## It's (Always) the Season for Wellness and Prevention

There are many opportunities to engage patients to ensure that they stay on track with preventive care visits, screenings, and vaccinations. Yet allowing staff members to focus their efforts on managing patient care requires a thoughtful approach to ensure that patient outreach and reminders are not burdening these overtaxed individuals. Today's technology, paired with a strategic, evidence-based approach, can ensure that your patients understand the value of prevention and see your organization as a long-term partner invested in their health.

To assist you in these efforts, Intrado has developed a patient preventive care and wellness outreach calendar that can keep your campaigns timely and on track. The entire 12-month calendar can be downloaded free [here](#).



**To learn more about how Intrado can help you optimize your patient outreach for preventive care or any other routine care services while delivering meaningful ROI, contact Intrado Healthcare today by emailing [HouseCallsPro-Inquire@intrado.com](mailto:HouseCallsPro-Inquire@intrado.com).**

