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4 steps to better patient engagement:

Effectively using identity data to attract today's healthcare consumer



Healthcare marketing has changed significantly over the past decade. Patients no longer stick to their nearest facility or the doctor their family has used for decades, but switch more often, getting information about their conditions and available treatments online. Health system marketing departments have adapted, customizing their messages, clarifying their services, and trying to establish lasting relationships with patients by increasing digital engagement via mobile and other channels.

Two things haven't changed much, though:

The budget of a health-system marketing department is still extremely tight, and the contact list managed by Marketing's own CRM, derived from marketing campaigns and other sources, still has significant quality problems.

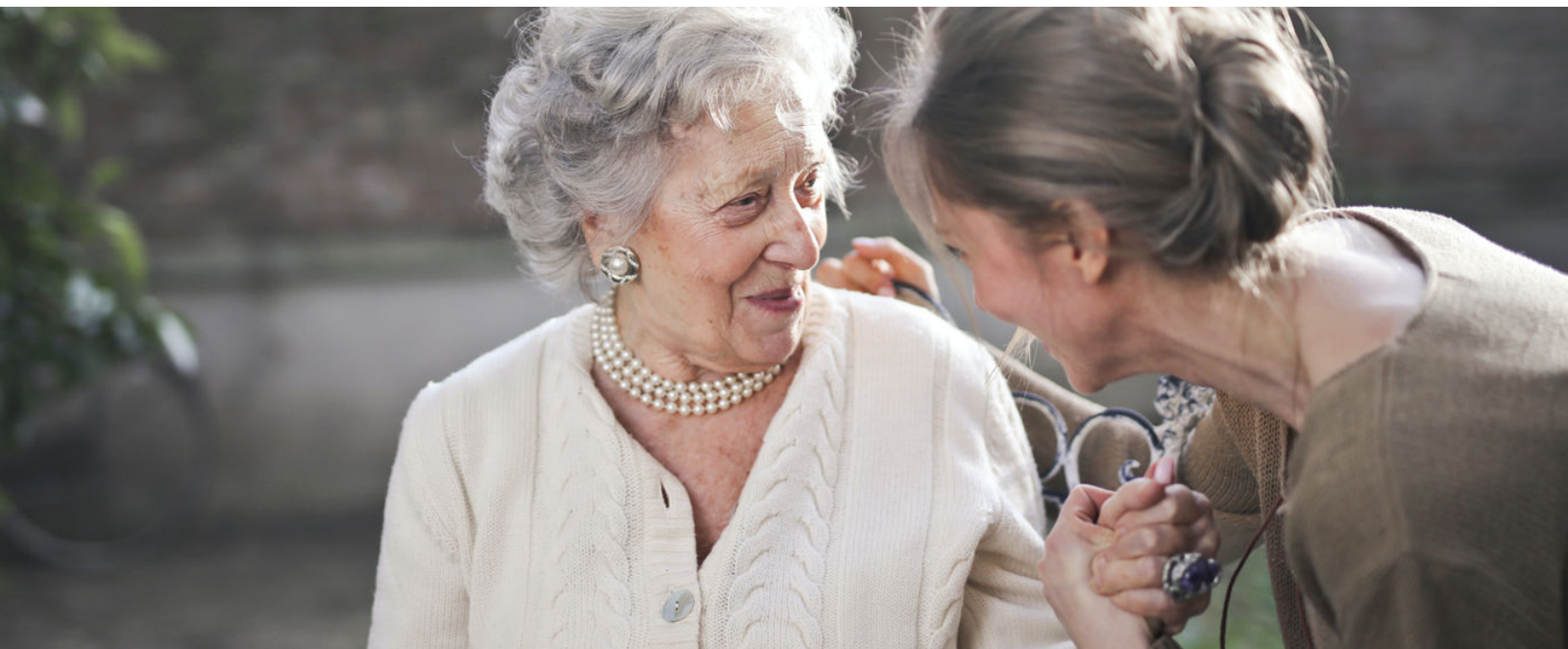
The information about patients and prospective patients is incomplete and fragmentary, and often comes from less-than-reliable third-party sources. Bits of information Marketing and other health system departments have acquired are in separate siloes, isolated in different systems. No one can get a complete picture, and Marketing's is probably the least complete.

If these fragmented records could be resolved and reliably linked to specific individuals, the resulting 360-degree view of each person would enable Marketing to optimize and track the effects of marketing efforts on an individual level.

What's inside

Introduction	1
Patient digital engagement faces a significant hurdle	3
The patients are way ahead of you	4
Four steps to better patient engagement	5
Focus on identity first	
Understand consumers as whole people	
Carefully manage this 360-degree view	
Activate your plans based on reliable patient identity	
Marketing needs a seat at the table	9
Identity data management in action	10

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More specifically, reliable consumer data management would:



Provide a complete and trusted understanding of each individual Marketing wants to communicate with, so that messages can be customized to their needs, experience, previous communications, preferences, and past behavior.



Enable reliable tracking of each patient journey, making attribution of marketing efforts and determination of marketing rate of return on investment easier and clearer.



Minimize inadvertent data exposure by being sure of the patient's identity, thus avoiding HIPAA violations.

But establishing clear patient identity is also a problem for healthcare providers. There have always been many duplicates and errors in patient records, even within a single EHR. In response to the HITECH Act, the gaps revealed by the COVID crisis, and a need to improve patient care, health systems are now undergoing a complex and often painful digital transition.

There is now an advanced approach for unified data management, called healthcare master data management or [hMDM](#), which will support not only health system clinical and operations needs, but it will also provide Marketing with a trustworthy source of truth for person data enriched by [other data sources](#), that will support effective marketing campaigns while ensuring privacy and security.

Patient digital engagement faces a significant hurdle

Hospitals do a lot of work to encourage patient digital engagement with their care, from portals to email check-ins from their provider, but these efforts are still hard to integrate and connect reliably to an individual patient. Patients still get irrelevant notices and communications that make them feel that their healthcare providers don't really know them. Reliable knowledge of each patient's identity would make it possible to make them feel known and understood and clarify which efforts have had the most impact and which activities most reliably convert leads to patients.



The problem stems from an inability to reliably assemble a complete and trusted view of each consumer from the many different sources of useful data that exist both within and outside the enterprise.

To ensure that each interaction is with the right person, using that person's complete and correct information, the organization must first resolve and manage the data to be sure they know who is who.





Over the past few decades, a combination of ad hoc systems acquisition and constant merger and acquisition activity has led to a proliferation of separate systems with multiple incompatible streams of data. Marketing customer relationship management (CRM) system is often completely isolated from these other systems. Even when Marketing's CRM does interact with patient registration and scheduling, the call center, and EHRs to update its records, it suffers from the same difficulties in ensuring lack of duplication, patient record quality, and mapping the right person in one system to the same person in another system.

Those other hospital patient databases are themselves split and poorly reconciled.

While progress is being made on a reliable system of patient reconciliation, most hospitals still face challenges with patient identity.

Some of this comes from poorly matched records within each system, and some from the existence of separate records for the same patient in different systems, including EHR, medical imaging, billing and coding, laboratory, pharmacy—and Marketing.

As a result, there is no complete, reliable 360-degree view of the patient journey usable by everyone. There is no guarantee that you're capturing every digital interaction the patient has with your health system.

Patients can feel that the system they are interacting with does not know them, and continually requests information from them it should already have. Without a solid foundation in patient identity, digital transformation and expanding digital engagement will be handicapped from the start.

The patients are way ahead of you

Today's patients are also today's consumers and so have significant expectations for digital engagement.

One of these expectations for healthcare is recent: the ability of patients to request and receive access to all their medical information, regardless of what system initially captured it. The 21st Century Cures Act and the ONC Final Rule have established this right as a matter of law. Ensuring this is possible is a significant challenge for data collection, aggregation, and presentation.

Patients are already used to accessing similar information from multiple sources through a variety of channels, from financial institutions to online purchasing. And this access is increasingly from mobile devices. The expectation has grown that this access will be multi-channel, intuitive, and smart—and at the consumer's convenience, not that of the system that holds their data. The demand for precision and flexibility from the healthcare system will only grow.

But healthcare is behind. There are good reasons for this: patient data is complex, subject to multiple regulations, and highly personal and emotional. There are also less-good reasons: multiple systems, data blocking between healthcare organizations, poor data hygiene, inadequate regulation, and data integration problems following mergers and acquisitions. As a result, healthcare struggles to update data handling while improving its methods of digital engagement with patients. And patients will perceive the quality of the healthcare system based on its ability to provide a high-quality interaction.

There are three things to know about digital transformation and identity:



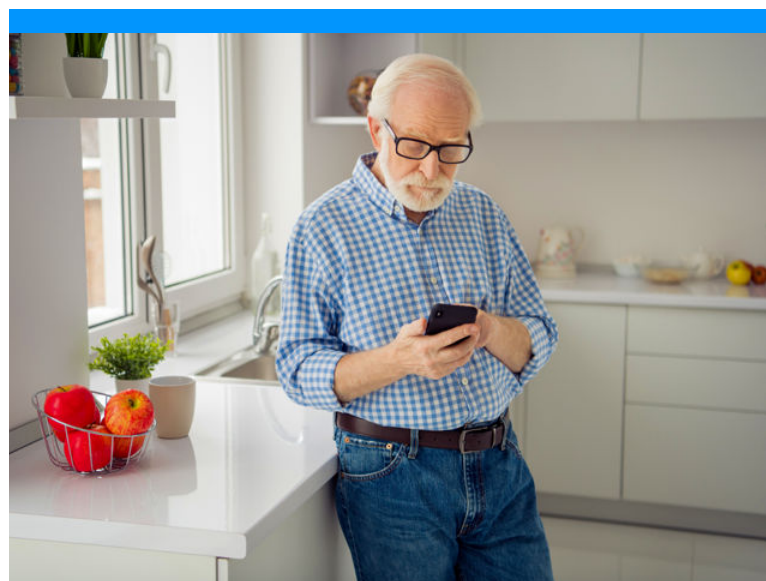
Hospitals and health systems have to manage a significant digital transformation process to better communicate with patients.



Accurate identity is the foundation of this digital transformation.



Health systems that solve the problem of accurate identity will transform more effectively and quickly, and as a result, will have a competitive advantage.



Four steps to better patient engagement

1

Focus on identity first

Much of the difficulty hospital marketing departments have in finding and maintaining contact with current and potential patients would be reduced if they were sure who is who, across every hospital data system. Only by first resolving identity unambiguously can fragmented data about an individual be confidently assembled.

Master patient index (MPI) solutions were created specifically to match patient data within one single source system like an EHR—and health systems tend to have multiple EHR systems across their sites and affiliated providers. [Enterprise master patient index](#) (EMPI) solutions arose to match patient data across multiple sources including those other than EHRs. EMPI removes and prevents duplicates and ensures that a patient record in one system can be reliably matched to a record from that same patient in a different system.

EMPIs use a variety of deterministic and probabilistic matching algorithms to determine whether two records point at the same person, but the only secure foundation for patient identity is what is called “[referential matching](#)”: basing person identity on a large, curated proprietary database that has a long history, consistently collects and reconciles a wide range of different data sources, and is consistently updated using the best available probabilistic algorithm.



The essential
first step is
*knowing who
is who.*

2

Understand consumers as whole people

Once identity is established, you can then increase its value by tying in other information about that patient, from demographics to social determinants of health (SDOH).

Additional sources of data—often procured from third parties—confidently linked to an individual can provide significant contextual information, including on other members of their household, their economic situation, their geographical location, their distance from the hospital, and SDOH like food or housing insecurity and access to transportation. Considerations of **these** additional data and knowledge of family relationships, for example, can help children keep up on their vaccinations, find family members who have been left out of the system, and provide referrals to support services that are not explicitly medical but support health. This supports other public health goals, as well as increasing patient retention.

Additional enrichment data can also power propensity models, which use multivariate statistical techniques to provide insight into the likelihood that a certain patient may benefit from a particular healthcare intervention or treatment. With reliable patient identity, such models can identify individuals who are good prospects for hip replacement surgery, a greater degree of cardiac surveillance, or some type of family support. Engaging in outreach to identified individuals can provide them with significant health benefits.

The intended result overall is a complete and trusted, 360-degree view of each consumer and a single source of truth for that information.

Additional information sources are beneficial only if they can be effectively reconciled with the patient record while considering their level of reliability. A database with a specific, otherwise unavailable set of data about individuals should not be rejected because it has errors and duplicates in it, but its reliability needs to be carefully gauged. The best way to gain benefit from unique data sources that may have quality problems is to assign a tier of trustworthiness to each data source. You can then match different data sources with similar reliability across their tier. The record of an individual in these data sources can be tied to the individual in your own high-quality patient record. This extracts the maximum utility from these data sources while not allowing any of their errors to reduce the reliability of the fundamental record.

You might have data from a web form, from the attendance list at an event, or in response to a direct mail solicitation. All of these are useful data, and tied to some kind of patient identification. They can enrich the patient record and support various marketing activities, without the risk of introducing errors. The ability to match tiers increases both the flexibility and power of the tools Marketing has available.

3

Carefully manage this 360-degree view

A complete and trusted 360-degree view of each consumer is a powerful tool, but only if you've got data management (including data mastering and stewardship) in place to be sure you can deliver the right data about the right person to the right place to make the right decisions—including all aspects of communications personalization. You can accomplish

this through Master Data Management (MDM). With MDM for patients, providers, and organizations you can get a highly accurate record from multiple systems, including relationships. By connecting all of these data sources, MDM creates and maintains a single source of master data that everyone in the enterprise can rely on. MDM also provides data governance. Every department has its own composite view into this unified data, so that it can get the data it needs for its own workflows, each with specific safeguards against showing sensitive information.

While various types of MDM are commercially available, healthcare has specific data requirements that are not satisfied by generic MDM solutions. What healthcare organizations need is a form of MDM specialized for their specific business needs and workflows, that is easy to implement out of the box for healthcare use cases like patient engagement marketing. This is called hMDM, and combines the critical functions of identity management and EMPI, built for clinical uses, and MDM, stimulated by Marketing requirements, to provide healthcare with a best-of-both-worlds solution.





4

Activate your plans based on reliable patient identity

Marketing can now plan efforts in engagement, outreach, and communication with the confidence that they are based on reliable and updated, complete and trusted patient and consumer records.

Of course, your success in driving value and results from a better understanding of each consumer you're hoping to attract and retain relies on the easy and seamless integration of your data management system to the data sources, such as EMR and CRM, that store critical data, and to the workflow tools, such as call center and marketing automation systems, that you use to execute strategy.

Given this deeper and more reliable knowledge of each individual, Marketing can identify the most effective touchpoints, and so refine and customize message content, timing, and frequency to increase effectiveness while minimizing intrusiveness. And each response to a campaign feeds back into the individual record, at the appropriate tier. This also provides Marketing with a clearer understanding of the effectiveness of each effort and the corresponding return on marketing investment.

Patients often feel anonymous in a bureaucratic health system, subject to a barrage of generic health advice and warnings. A secure identity for each patient supports customized communications that provide them with a feeling of being known and understood. In return, any provider they encounter has all the necessary information about them immediately at hand and can focus on their needs without needing to ask redundant questions. This supports a more trusting relationship on both sides.



Marketing needs a seat at the table

It's not only data that is stuck in siloes. All the functions in the healthcare system are still partly cut off from each other. And Marketing is no exception.

Marketing activities have a significant impact on the healthcare system's patient base and thus its bottom line. And without maintaining the flow and retention of patients and the resulting reimbursements, a healthcare system cannot perform its mission.

Campaigns and outreach, as well as all interactions with patients and consumers, benefit enormously from being based on reliable identity information. Marketing needs to make its voice heard on issues of patient identity. Marketing doesn't need access to the same detailed clinical data essential to the functioning of other departments. But it does need to be certain that the information it does need access to, as well as the information it generates as a result of its activities, is reliably tied to the same identified patient.





Furthermore, with appropriate focus on identity to connect records from across siloed systems, the information Marketing derives from its patient interactions can map back into improving the effectiveness of portals, health communications, health center location and design, and public health services. The effectiveness of every encounter with that patient or consumer can be improved with marketing information. And secure knowledge of who that patient is ensures that efforts hit the right targets.

The most effective healthcare providers know that identity is foundational for all

digital transformation activities. It enables them to integrate multi-channel, highly targeted, and specific online and offline efforts to drive growth and engagement. To execute effectively on these initiatives, marketing needs access to accurate, complete patient and consumer identity information.

To improve its operations and benefit the healthcare system as a whole, Marketing must understand and then articulate its specific patient identity needs to the organization. Only in that way can it be sure it is providing the best performance possible to its healthcare system.

Identity data management in action

Verato helps large Texas health system deliver a consumer-grade care experience

Who

Nonprofit health system that cares for more patients in North Texas than any other provider through large physician groups, hospitals, outpatient facilities, neighborhood-based care and wellness centers, home health, and preventive and fitness services.

Challenge

Health system is committed to deliver a completely connected consumer experience from marketing to digital health to in-person care—despite data being highly fragmented across systems including Salesforce and Epic, and without the historical ability to unite and consume this data across systems.

Solution

- Focus on identity management as critical, foundational first step to creating seamless experiences for patients and consumers
- Verato delivers a single ID and unified understanding of each person across dozens of siloed source systems, providing a single source of truth
- Verato platform with Referential Matching improves matching accuracy of Epic's MPI and automates identification and resolution of duplicate records
- Easily integrated >40 sources of data within one week instead of months.





Verato, the identity experts for healthcare, enables smarter growth, improved care quality and efficiency, and better population health by solving the problem that drives everything else—knowing who is who™. The Verato University Identity™ platform, the industry's first purpose-built healthcare master data management (hMDM) solution, enables a complete and trusted 360-degree view of patients, members, providers, and communities. Over 80 of the most respected brands in healthcare rely on Verato to resolve, manage, and enrich person and provider data across the complex digital health ecosystem with unprecedented accuracy, ease, and time-to-value. With an enterprise-wide single source of truth for identity, Verato ensures that you get identity right from the start.

For more information, visit verato.com.

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