

Provider Perspectives on Digital Access

2022 Edition

200 Providers Weigh in on Access, Engagement, and Today's Top Challenges



INTRODUCTION: PROVIDERS ARE PIVOTAL FOR PATIENT ACCESS AND EXPERIENCE

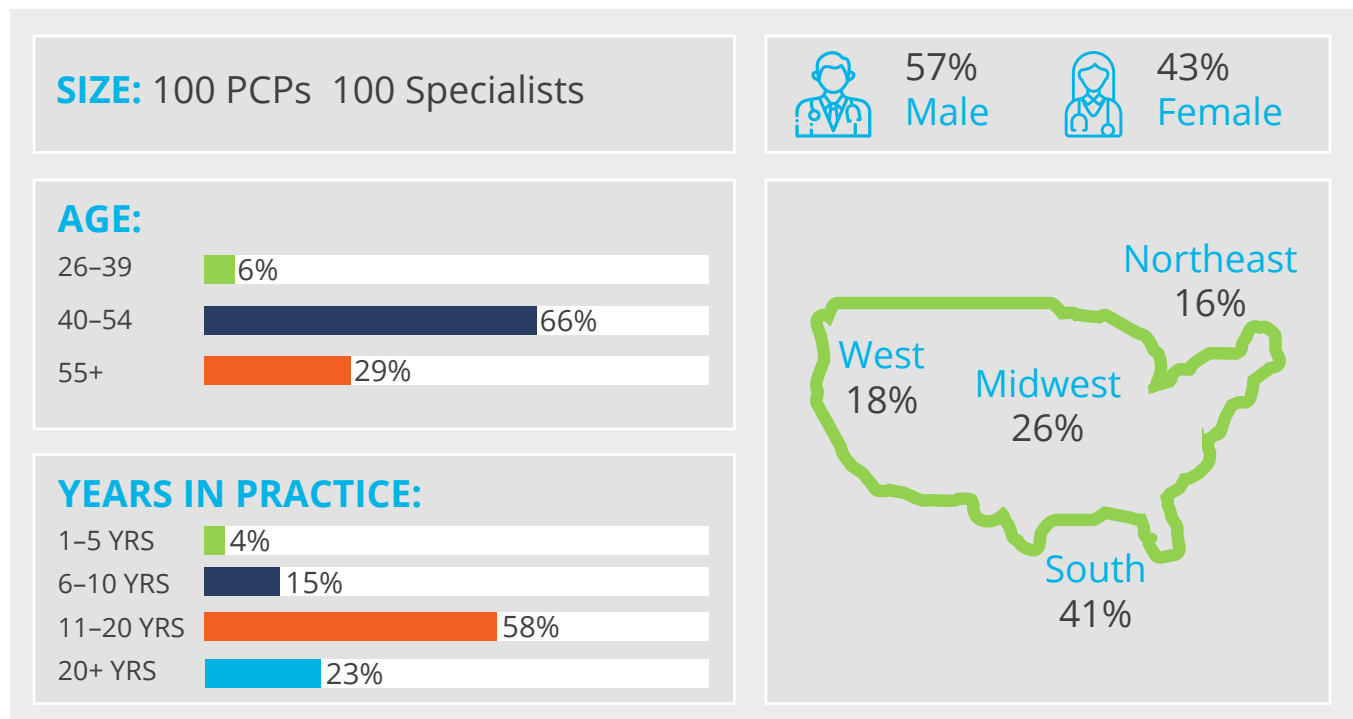
Today's patients are more digitally engaged and their expectations for easily finding, selecting, and scheduling care are higher than ever. To keep pace, healthcare organizations have focused on creating engaging digital experiences to meet growing consumer demand for convenience and self-service—and the COVID-19 pandemic has only increased the urgency to innovate.

While focusing on patient needs is essential, healthcare organizations must not lose sight of an equally important stakeholder group in patient access and experience: healthcare providers. Since Kyruus' last study of provider perspectives in 2019, primary care providers (PCPs) and specialists have endured rapid-fire changes in care delivery, staffing, clinical and practice management technology, and more.

This report serves as a platform for providers to share their current beliefs on their healthcare organizations' digital access strategies, their most pressing challenges, and how they want to partner with their organization going forward. Armed with these perspectives, healthcare organizations can better engage providers to gain insight, secure buy-in, and ultimately influence the success of patient access and engagement efforts—whether in the form of richer, more accurate provider profiles, greater adoption of online scheduling solutions, or faster acceptance of emerging technologies.

ABOUT THE SURVEY

The information in this report is culled from an online survey conducted in April 2022 by Wakefield Research, an independent research firm, on behalf of Kyruus. The survey included 200 providers who have been in practice for > 1 year, spend 20+ hours a week seeing patients, are employed by a hospital or health system, and treat patients in ambulatory settings.



KEY FINDINGS



The majority of providers are satisfied with the quality of their online find-a-provider profiles, and while nearly all are involved in creating and maintaining these at some level, 94% still want to be more involved. Those who are dissatisfied say it's because their profile lacks information they'd like included—a concern that's doubled in incidence in the past three years.



Similar to our 2019 study, providers focus on three top reasons for maintaining a robust digital profile: to showcase professional experience (45%), academic experience (e.g., research, publications) (42%), and improve visibility to referring providers (39%). Accuracy is key here, as it helps providers differentiate themselves to both referring providers and consumers seeking care.



Providers want their profiles to surface everywhere consumers might search online for care—including health plan websites, search engines, and health-related third-party sites—as a means to boost patient acquisition. But they can't make this happen on their own: two-thirds say it's extremely or very important for healthcare organizations to be more active in online channel expansion, up from just over half in 2019.



Online scheduling marks the greatest area of change in this year's survey, with two-thirds of providers reporting consumers can book appointments with them on their healthcare organizations' websites, an increase of over 30 percentage points since 2019. The same significant upward trend holds true for provider interest in online scheduling, and virtually all providers say it benefits both existing and new patients and helps their office staff save time.



Providers want to partner with healthcare organizations on digital access initiatives, and two-thirds are satisfied with how these initiatives are communicated to them, a marked increase from three years ago. Providers are also looking to their organizations to help them alleviate major challenges, including staffing shortages, by leveraging technology.



A ROBUST DIGITAL PRESENCE ON HEALTHCARE ORGANIZATION WEBSITES IS PARAMOUNT

Providers continue to value a high-quality digital presence, saying it's critical to ensure their profile is an accurate representation of their experience.

A high-quality profile—one that surfaces a range of relevant attributes—on their healthcare organization's public find-a-provider website continues to be extremely or very important to the majority (78%) of providers, indicating a desire to present an accurate and complete picture of themselves to consumers seeking care as well as to other providers. In fact, when identifying the top reasons why they value a high-quality profile, nearly half (45%) ranked accurately conveying their professional experience as the most important reason, followed closely by showcasing their academic research, publications, and experience (42%) (Figure 1).

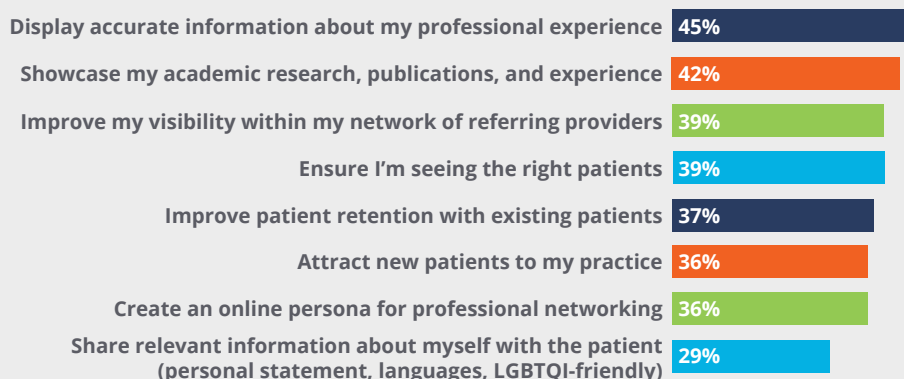
Providers believe their digital profile is also important to differentiate themselves from their colleagues, which they see as vital to improving their visibility to referring providers (39%) and helping to ensure the patients who schedule care with them are clinically appropriate (39%).

While overall provider satisfaction with their digital profiles remains high (87%), their levels of satisfaction have dropped slightly in the past three years: fewer say they are completely or mostly satisfied, and the number who are dissatisfied has risen by five percentage points.

Of those providers who are dissatisfied with their digital profiles, nearly 60% say their profiles lack important attributes, a number that has doubled over the past three years. Further, providers cite irrelevant, inaccurate, and outdated information as a source of dissatisfaction (39%, 35%, and 30%, respectively). About one-third of providers who are dissatisfied with their digital profiles say they were not involved in its creation; that number jumps to 50% for PCPs.

Figure 1: Recognizing the Value of High-Quality Provider Profiles

Please rank the following reasons for having a high-quality find-a-doctor profile in terms of how important they are to you.



Note: The top 3 ranked responses are shown and indicate the percent of providers that selected a response as either their first, second, or third choice.

n = 200

RECOMMENDATIONS FOR HEALTHCARE ORGANIZATIONS

- **Provider buy-in.** Providers continue to view their digital profile as a powerful platform to spotlight their unique skills and build referral relationships. By focusing more on the specific benefits that resonate with providers, healthcare organizations will be more likely to win initial buy-in for digital initiatives.
- **Provider engagement.** Healthcare organizations can also offer support by establishing a provider engagement program that shares guidance about what attributes are most important to surface and enables providers to validate their profile data and define their clinical focus areas in detail.
- **Data governance.** While there are many benefits to data quality when providers and their staff can access and update data, it is important to establish a clinically-led data governance strategy that defines processes to ensure data accuracy and security. Creating these processes enables healthcare organizations to engage providers and administrators effectively in maintaining accurate data with appropriate approvals and minimal risk.

PULSE CHECK: ENHANCING PROVIDERS' DIGITAL PRESENCE



81%

of providers say a high-quality profile is extremely or very important for patient retention



78%

of providers say it is extremely or very important to share information about themselves (personal statement, languages spoken, LGBTQI-friendly) in their profile



50%

of primary care providers say they were not involved in creating their find-a-provider profile



PROVIDERS WANT HELP TO EXPAND THEIR CROSS-CHANNEL DIGITAL PRESENCE

Providers view external channels as a conduit for patient acquisition and rely on healthcare organizations to help ensure they are accurately represented across the web.

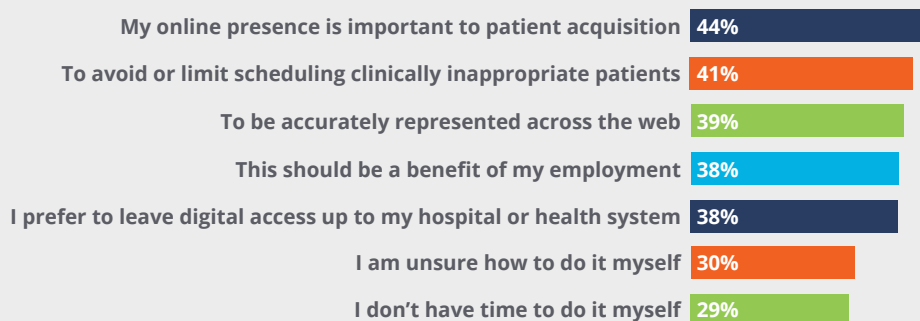
Consistent with the 2019 survey, nearly all (98%) providers agree that it is important for their healthcare organization to take a more active role in managing their profiles in external digital channels—such as Google, health plan directories, and third-party healthcare websites (e.g., Healthgrades, ZocDoc, Vitals, Doximity).

Health plan directories top the list of external digital channels where providers want healthcare organizations to more actively manage their profiles (77%), narrowly edging out Google (76%), and with third-party healthcare websites also highly desired at 70%.

When asked why their healthcare organization should more actively manage their profiles externally, providers most frequently say this support is needed to drive patient acquisition (44%) and to help avoid or limit the scheduling of clinically inappropriate patients from these channels (41%) (Figure 2). The latter can be minimized through greater profile accuracy—which enables consumers to select the right care for their needs—so it is logical that nearly two-fifths of providers cite being accurately represented across the web among their top three reasons for healthcare organizations to take the lead in increasing cross-channel visibility.

Figure 2: Managing Provider Profiles Across Channels

What are the most important reasons healthcare organizations should take an active role in managing provider profiles on Google, insurance provider websites, and other third-party websites (e.g., Healthgrades, ZocDoc, Vitals, and Doximity)?



Note: Respondents were able to select up to three options

n = 199

RECOMMENDATIONS FOR HEALTHCARE ORGANIZATIONS

- **Cross-channel reach.** A rich digital presence across channels is important to providers, and healthcare organizations should explore opportunities to leverage their provider directories in other digital channels such as search engines, health plans, and other healthcare-related websites. This will help ensure providers are accurately represented wherever patients are looking for care online.
- **Profile quality.** Providers are vocal in their desire to convey high-quality profile data, so it's important to ensure that their data is surfaced in third-party channels at the same level of quality as on the healthcare organizations' websites. A robust provider data management system is key here, as it helps healthcare organizations centralize and manage their provider data, so when data is shared, it is both up-to-date and consistent.
- **Healthcare organization support.** Providers know they cannot build their presence in third-party channels themselves—support from their healthcare organization is critical. Engaging providers in the exploration phase of third-party channel opportunities helps secure their buy-in and encourages them to continually improve and maintain their own profile data.

PULSE CHECK: SEEKING CROSS-CHANNEL PRESENCE



66%

of providers say it is extremely or very important for their healthcare organization to more actively manage their profile externally



38%

of providers prefer to leave digital access management to their healthcare organization



44%

of providers say their healthcare organization should more actively manage their profile externally to drive patient acquisition



OFFERING ONLINE SELF-SCHEDULING TO NEW AND EXISTING PATIENTS IS THE NEW NORM

Availability of—and interest in—online scheduling has increased rapidly, as providers see benefits for new and existing patients as well as staff.

Our survey reveals a major change in the availability of and interest in online scheduling. Online scheduling availability has increased by 31 percentage points in the past three years, with two-thirds of providers (68%) now reporting that consumers can schedule appointments with them on their healthcare organization's public-facing website, i.e., outside of a patient portal. The rate is slightly higher for PCPs (70%) than for specialists (65%).

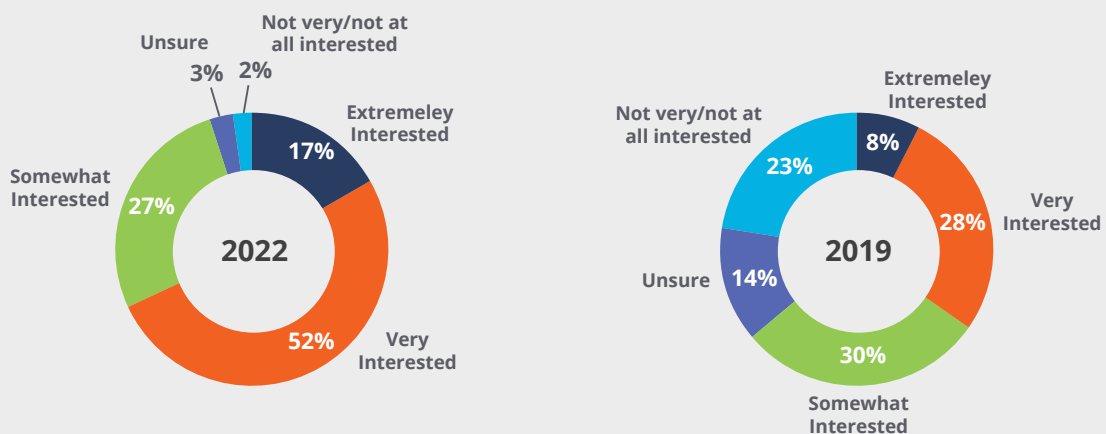
Interest in online scheduling has also skyrocketed since 2019, with 96% of providers reporting that they are interested in this capability—an increase of 30 percentage points (Figure 3).

When asked about the potential benefits of online scheduling, providers' responses reveal their belief that it can serve both existing and new patients. Nearly half (48%) say online scheduling helps keep existing patients in-network, while 46% say it provides greater convenience for existing patients. They also recognize benefits such as attracting new patients (42%) and enabling them to self-schedule their own appointments (43%).

More providers now (44%) than in 2019 report that online scheduling is a boon for the office staff as well, saving them time so they can focus on other tasks (an increase of 9 percentage points).

Figure 3: Skyrocketing Interest in Online Scheduling

How interested, if at all, are you in allowing patients to self-schedule appointments online?

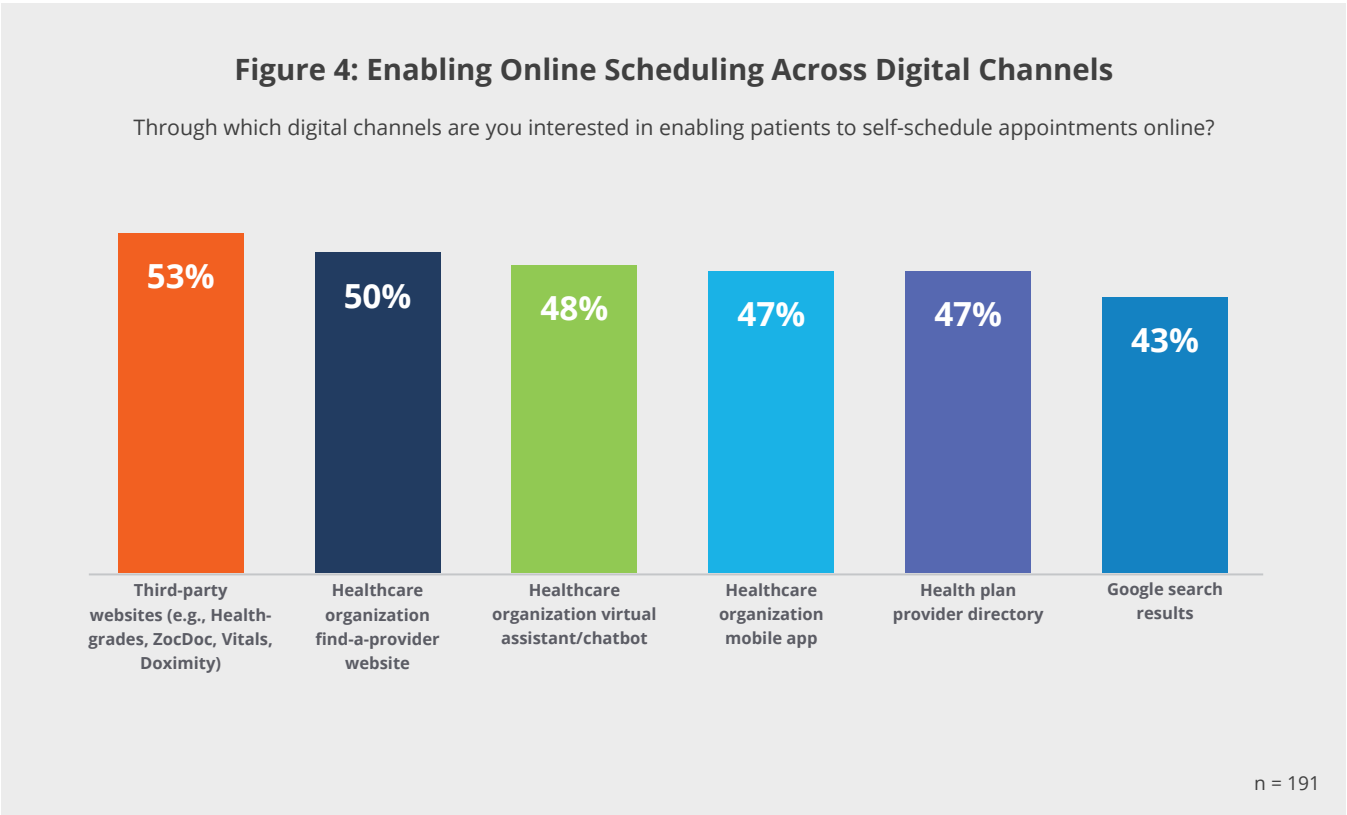


n = 200

Providers are interested in enabling online scheduling for many appointment types, with established patient and ancillary services (e.g., imaging, labs, vaccines) appointments topping the list at 59% and 52%, respectively. Not surprisingly given their explosive growth over the past few years, virtual care appointments round out the top three, with 47% of providers saying they are interested in online scheduling for telehealth visits.

Consistent with their desire to build their digital presence across the web, providers are most interested in enabling online scheduling from external third-party healthcare websites (e.g., Healthgrades, Vitals, Doximity) (53%). They are similarly interested in having online scheduling available across their own organizations' web properties: find-a-provider website (50%), virtual assistant or chatbot (48%), and mobile apps (47%). Health plan directories also feature prominently, with nearly half (47%) of providers wanting to enable online scheduling from this channel (Figure 4).

While providers are leaning into online scheduling, there are aspects that can give them reason for pause. Some of their top concerns—inappropriate insurance (43%), appointment lengths (41%), and patient types (35%)—indicate that providers believe that online scheduling, when not done right, could negatively impact their practice financially and/or operationally. They also worry that online scheduling may cause them to lose control of their schedule (36%) and require them to standardize their existing scheduling template (30%).



RECOMMENDATIONS FOR HEALTHCARE ORGANIZATIONS

- **Provider adoption.** Given the significant change in provider interest regarding online scheduling, healthcare organizations should encourage more providers to adopt this capability. By doing so, they will maximize their ROI from online scheduling and deliver wide-scale convenience to today's digitally empowered consumers.
- **Provider hesitancy.** Despite the rapid increase of online scheduling, some providers are still hesitant. Healthcare organizations should reach out to these providers to understand and address their concerns. Sharing the positive experiences of other providers who offer online scheduling can inspire confidence through real-life proof points.
- **Healthcare organization guidance.** Providers who show interest in online scheduling need a roadmap. Let these providers know that online scheduling can be implemented over time and encourage them to start with a subset of appointment types to gain experience and comfort with the process.

PULSE CHECK: EMBRACING ONLINE SCHEDULING



100%

of providers recognize at least one benefit of online self-scheduling for patients



50%

of PCPs are interested in online booking for virtual care appointments



53%

of providers are interested in enabling online scheduling from third-party websites



PARTNER WITH PROVIDERS TO BUILD ENGAGEMENT AND ADVOCACY

Providers appreciate improved communication and engagement around digital access initiatives—and they want to collaborate to solve the top challenges they face today.

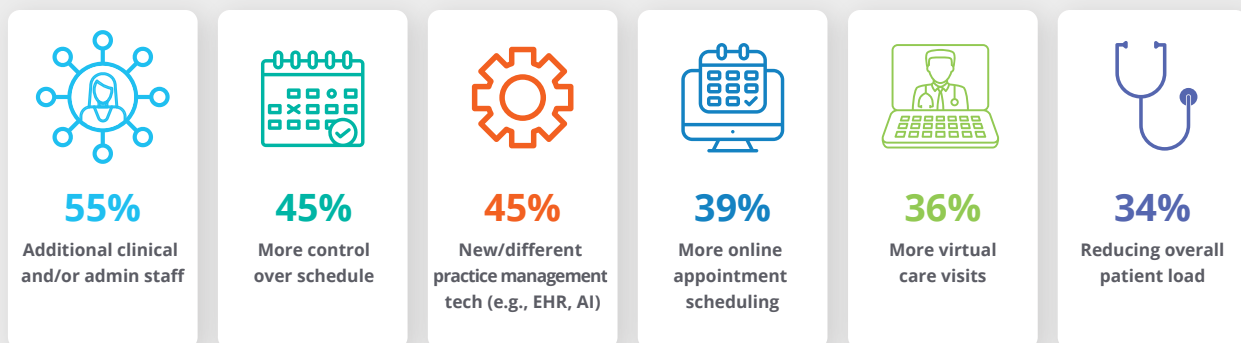
Communication between providers and their healthcare organization is a critical component to the success of digital access strategies—when providers understand the objectives and benefits of these initiatives, they are more likely to support them. The good news is that two-thirds of providers are completely or mostly satisfied with communication from their healthcare organization around digital access initiatives (like the ones described in this report)—a marked change compared to three years ago, when less than half (46%) said the same.

Providers also want to play a role in digital access strategies. Today nearly all (93%) say they are involved to some degree in creating their profile on their healthcare organization's find-a-provider website, a slight increase over the 2019 survey. What's more, 94% want to be more involved in creating and maintaining their online profile, either personally or through their staff, with specialists wanting to be more personally involved and PCPs preferring to lean on their staff.

A new research area in the 2022 survey asked providers to identify their top clinical and industry challenges, and among their most frequently cited responses is staffing shortages that impact them (42%) and their staff (40%). This is another opportunity for healthcare organizations and providers to work together on a solution. For example, aside from the most obvious remedy, adding additional staff, providers who include workforce shortages as a top challenge say having greater control over their schedules (45%) and implementing new technology solutions—including new/different practice management tools (45%) and more online scheduling (39%)—would have the greatest impact on alleviating this critical issue (Figure 5).

Figure 5: Alleviating Staffing/Workforce Shortages

Which of the following options, if anything, would have the greatest impact on helping alleviate staffing or workforce shortages for you and your practice?



Note: Respondents were able to select up to three options

n = 128

RECOMMENDATIONS FOR HEALTHCARE ORGANIZATIONS

- **Provider communications.** Continuing the momentum of improved provider communications surrounding digital access initiatives established during the pandemic is important. Provider buy-in remains essential to keep pace with growing consumer demands for greater access and convenience.
- **Data management.** Creating and maintaining a robust digital profile may seem daunting to some providers. Alleviate their concerns by centralizing provider data in a single repository so it is easy to access and establish a data governance committee that helps providers focus on attributes that differentiate themselves and are most likely to impact demand conversion.
- **Technology adoption.** Staffing shortages are significantly impacting providers and their practices. Healthcare organizations can help by making it easy for providers to adopt or increase their use of online scheduling and other practice management technologies into their workflows. Clearly conveying the benefits and providing implementation support will help ease the transition.

PULSE CHECK: FOSTERING PROVIDER COLLABORATION



50%

of specialists want to be more involved in creating and maintaining their own digital profile



49%

of providers not involved in profile creation/maintenance opt out due to lack of time



40%

of PCPs impacted by staff shortages say more online scheduling can alleviate this challenge

CONCLUSION: PROVIDER ENGAGEMENT IS KEY TO ONGOING ACCESS INNOVATION

The events of the past three years have forever changed how healthcare organizations and providers work together, and providers' collective experiences are evident throughout the responses shared in this study. Increased levels of communication between providers and their healthcare organizations is a positive trend—and a clear signal that healthcare organizations should continue to engage providers in their strategic roadmaps, working with them to enhance their digital profiles, expand online scheduling capabilities, and adopt other practice management technology to increase efficiency and improve patient experience. There's room to grow these relationships as well, with providers looking to their healthcare organizations for help addressing staffing shortages and other concerns today and in the future.



For more insights on patient access and provider data management—including white papers, case studies, and more—visit the Kyruus Resource Library at <https://www.kyruus.com/resources>.