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The Patient Access Decisioning Guide

Inside the Guide

From Hype to High-Stakes:
The New Reality of Healthcare

Across the United States, <u>patient appointment</u> wait times now average more than three weeks, revealing a growing strain on healthcare operations and access to care. To address these delays, healthcare leaders are shifting investment priorities in scheduling technologies that improve efficiency, reduce manual workload, and expand access channels.

In a <u>recent survey</u>, healthcare executives indicated prioritizing and investing to enhance their patient's experience while also seeking to increase efficiency. The leading access priorities included call center infrastructure upgrades, patient portal enhancements, and AI-enhanced scheduling tools, highlighting a shift toward digital-first, operationally driven transformation across patient access.

Among these investments, AI-enhanced scheduling tools have emerged as a key level for change. Intelligent platforms can predict no-show risk, optimize appointment slots, and automatically notify patients when last-minute openings arise. By transforming capacity management into a proactive process, healthcare organizations are moving from curiosity to capability and embedding intelligence directly into the operations that define patient access.

OPERATIONAL PHASE — Embedded intelligence

APPLIED PHASE — Early Measurable Outcomes

EXPLORATORY PHASE — Isolated use cases

Technology adoption in patient access is evolving from isolated experimentation to operational infrastructure

Where to Begin:
Anchoring Intelligence in Patient Scheduling

For many healthcare leaders, technology decisions begin with enthusiasm but quickly meet complexity. Often, advanced features sound promising but don't always address an organization's immediate realities of scheduling and access operations. The result can be stalled rollouts, unclear ROI, and solutions that don't meaningfully lighten operational workload.

One of the most persistent pain points is waitlist management. When patients cancel or reschedule, staff spend hours manually calling others to fill open slots. Intelligent automation can handle this process automatically by sending messages to patients on the waitlist the moment a slot becomes available, allowing them to claim the opening within minutes. This reduces manual effort and prevents lost appointment capacity.

The most effective starting point for automation is where it complements existing workflows. High-volume, repetitive scheduling activities such as verifications, reschedules, and cancellations follow clear patterns, making them ideal for automation that improves accuracy, saves time, and builds early trust across teams.

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> AI should start with your organization's goals, not a feature list. When automation aligns with how teams already work, that's when it delivers real impact.

David Dyke
Chief Product Officer
Relatient

Rethinking How Technology Decisions Are Made

The differences between short-term pilot and lasting value often come down to how decisions are made. Many organizations still begin by comparing product features rather than assessing what fits within their day-to-day workflows.

Feature-led adoption can generate quick excitement but rarely long-term success. It often results in disconnected tools that operate in silos.

"Someone shouldn't tell you what you need before they understand who you are," Dyke shared. **"In healthcare, we would never prescribe before diagnosing, and the same applies to AI."**

By contrast, operations-led adoption starts with how scheduling, staffing, and coordination already function, ensuring new technology integrates seamlessly with existing systems, data flows, and provider rules. This mindset shift from feature-first to operations-led thinking ensures every investment strengthens access, efficiency, and patient experience.

Two Paths to AI Decisioning

Feature-Led Decisions

- Begins with technology capabilities
- Measures success by deployment speed
- Focus on isolated use cases
- Guided by external product roadmaps

Operations-Led Decisions

- Driven by operational needs
- Success measured by operational and patient outcomes
- Integrates automation across patient access workflows
- Aligns with long-term organizational goals

The Patient Access Decision Matrix

As intelligent automation becomes more embedded in patient access, leaders need a clear way to evaluate where it adds value and where human interaction remains essential. The Patient Access Decision Matrix helps organizations make that distinction.

The framework maps patient access tasks across two dimensions: how rules-based a process is and how complex it is to complete. This helps organizations determine which workflows can be automated, which are best supported by automation, and which should stay human-led.

For example, routine scheduling tasks such as appointment verifications, cancellations, and reminders follow clear, consistent rules. These can often be automated to reduce repetitive work. More nuanced tasks like prescription refills, referral outreach, or pre-visit instructions combine structure with patient context, making them better suited for assistance rather than full automation.
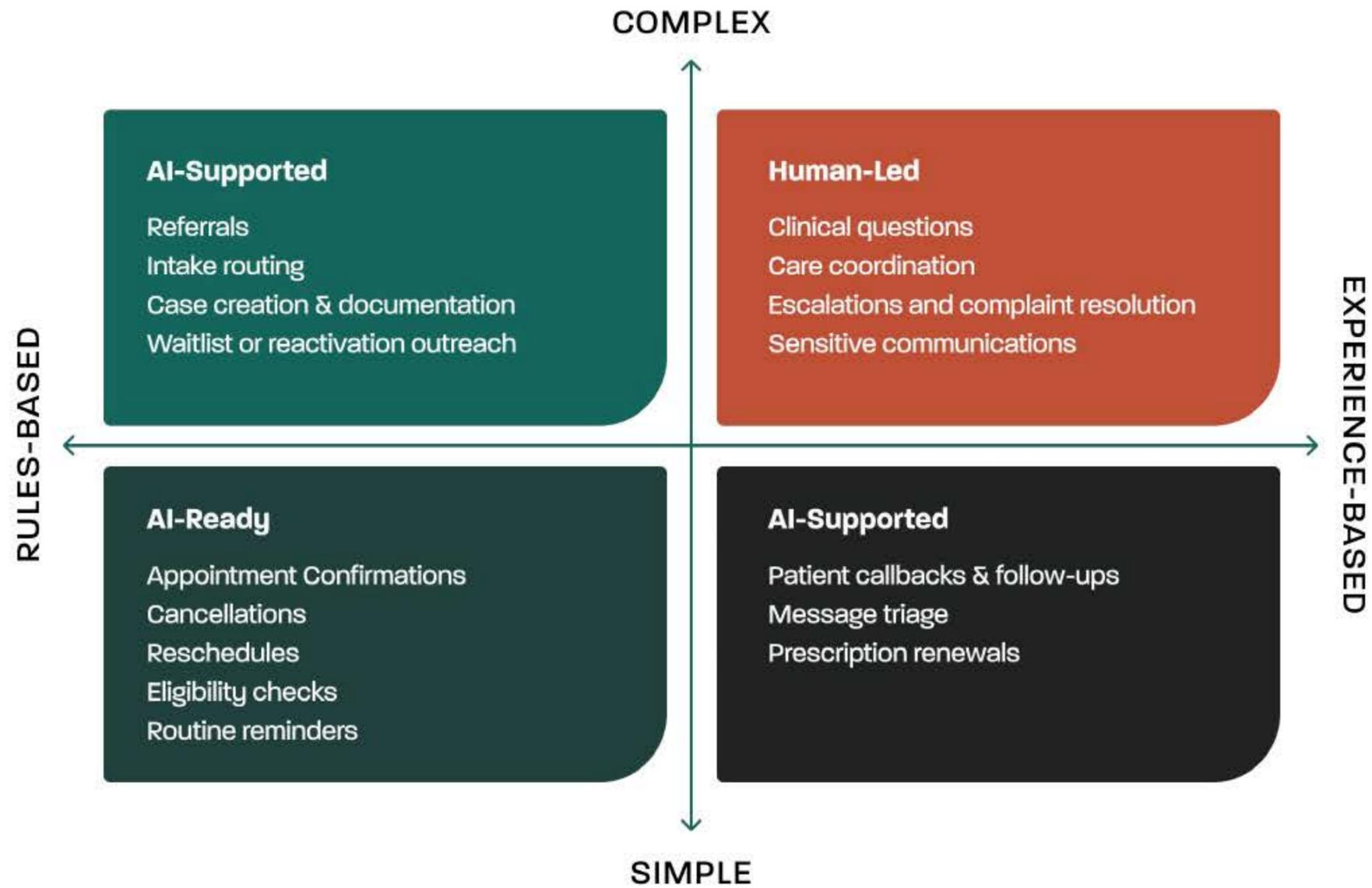
On the other hand, tasks that require human empathy, discretion, or clinical understanding such as resolving billing disputes or managing care coordination depend heavily on human judgment. Keeping these human-led ensures quality interactions and protects patient trust.

The Decision Matrix provides a simple way to visualize how automation can fit into daily operations without overextending. This framework also leads directly into the next section, which outlines how to apply it in practice through a phased adoption strategy.

View the complete matrix →

The Patient Access Decision Matrix

A framework for aligning automation with operational reality.

COMPLEX

RULES-BASED

EXPERIENCE-BASED

AI-Supported

Referrals

Intake routing

Case creation & documentation

Waitlist or reactivation outreach

Human-Led

Clinical questions

Care coordination

Escalations and complaint resolution

Sensitive communications

AI-Ready

Appointment Confirmations

Cancellations

Reschedules

Eligibility checks

Routine reminders

AI-Supported

Patient callbacks & follow-ups

Message triage

Prescription renewals

SIMPLE

The Decision Matrix provides a strategic lens for aligning technology investment with operational priorities. It distinguishes where automation enhances performance, where human oversight remains essential, and how leaders can scale impact with intention.

Building Momentum:
The Four Phases of Operational Maturity

Once leaders understand where automation fits, the next step is to scale with intention. The Four Phases of Operational Maturity outline how to move from early, low-risk automation wins to a fully connected, intelligent access operation.

Each phase balances innovation with stability, giving teams confidence and visibility into what's changing and why:

1 **Relieve:** Begin by automating repetitive tasks to free staff capacity and validating smart workflow logic.

3 **Expand:** Extend automation to related workflows such as referrals and billing inquiries.

2 **Standardize:** Apply consistent scheduling rules and data governance across every access channel.

4 **Optimize:** Use analytics to refine performance, measure ROI, and guide future operational decisions.

Together, these stages create a roadmap for continuous improvement, strengthening trust, improving accuracy, and supporting patients with simpler, more reliable access to care.

The Four Phases of Access Adoption:
Climbing Toward Operational Maturity

From early scheduling automation to ongoing optimization, each phase marks progress toward a connected, data-driven access strategy that balances efficiency with empathy.

Phase 4:
Optimize
Turn insights into action to measure, refine, and grow the value of automation over time.

Phase 3:
Expand
Bring automation to new workflows and connect more of the patient access journey.

Phase 2:
Standardize
Create a single playbook for scheduling logic, data accuracy, and governance.

Phase 1:
Relieve
Start where automation makes the day lighter, proving fast results.

Connecting Automation to What Matters Most

Technology is a powerful tool, but it is not the ultimate solution. True progress in patient access happens when technology supports the people and processes that already make care work. The organizations seeing the greatest results use automation to enhance their existing strengths. They focus on outcomes that matter most: appointment accuracy, call resolution, and patient experience.

When automation improves scheduling accuracy or reduces the time needed to confirm or reschedule appointments, the benefits extend across the system. Patients are guided to the best experience every time, whether that means receiving a smart link to self-schedule a new appointment or connecting with staff for more complex needs.

"The AI has been able to take on about 20% of the calls that come in every day." shared Meredith Warf, CEO of Mississippi Sports Medicine and Orthopedic Center. "It's also able to send a message directly to our care team."

This is where technology meets strategy. When all departments share a unified definition of success, automation stops being about systems and starts being about impact. It strengthens performance, reinforces trust, and ensures every workflow improvement translates into real patient value.

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> The AI has been able to take on about 20% of the calls that come in every day. It's also able to send a message directly to the care team. It can just listen to the call and get a message to the team. Again, just creating a bit simpler way to get the job done every day."

Meredith Warf
Chief Executive Officer
Mississippi Sports Medicine
and Orthopedic Center

Putting the Framework into Motion

Once the framework is defined, success depends on how it's put into practice. The most effective approach follows a structured rollout, one designed to show measurable impact early, minimize disruption, and build confidence across teams.

At 30 days, the focus is on relief: automating the highest-volume, most repetitive scheduling tasks. These workflows often represent almost half of inbound call volume and deliver fast, visible results for teams.

By 60 days, the goal shifts towards consistency. Teams align localized rules and preferences across every scheduling channel whether it's phone, text, chat, or web, ensuring automation follows the same logic everywhere patients book care.

At 90 days, organizations move into optimization. With real performance data available, leaders can refine logic, measure ROI, and identify additional workflows ready for assisted or automated support.

The goal is steady progress with low risk, with each phase delivering measurable outcomes that build confidence and pave the way for broader adoption.

30 DAYS : MOMENTUM

60 DAYS : CONSISTENCY

90 DAYS : EXPAND

Turning Insight into Action Through a Structured, Low-Risk Rollout

30 DAYS : BUILD MOMENTUM

Automate high-volume, low-complexity scheduling tasks like verifications, cancellations, and reschedules.

QUICK WIN

Improved call handling capacity

60 DAYS : CREATE CONSISTENCY

Extend the same intelligence to text, chat, and digital scheduling, so every smart workflow follows the same logic.

QUICK WIN

Reduced scheduling errors and improved patient experience

90 DAYS : OPTIMIZE & EXPAND

Use early data to refine workflows, measure ROI, and expand automation into assisted or AI-supported tasks.

QUICK WIN

Sustainable performance gains and a clear path to continued improvement

From Operation to Orchestration:
The Power of Intelligent Scheduling

Throughout this guide, one principle has been consistent: technology creates real impact when it strengthens the operations that already define patient access.

Intelligent scheduling is where that alignment becomes orchestration. It connects localized rules, contact center workflows, and digital channels through one coordinated layer of logic. Every interaction, whether managed by staff or automated, follows the same framework for accuracy, speed, and context.

When automation becomes orchestrated, every part of access moves in sync. Staff spend less time managing tasks, patients get faster access to care, and leaders gain measurable performance.

SELF-SERVICE
CHANNELS

ORCHESTRATED
INTELLIGENCE

AI-DRIVEN
DEFLECTION

STAFF-ASSISTED
SCHEDULING
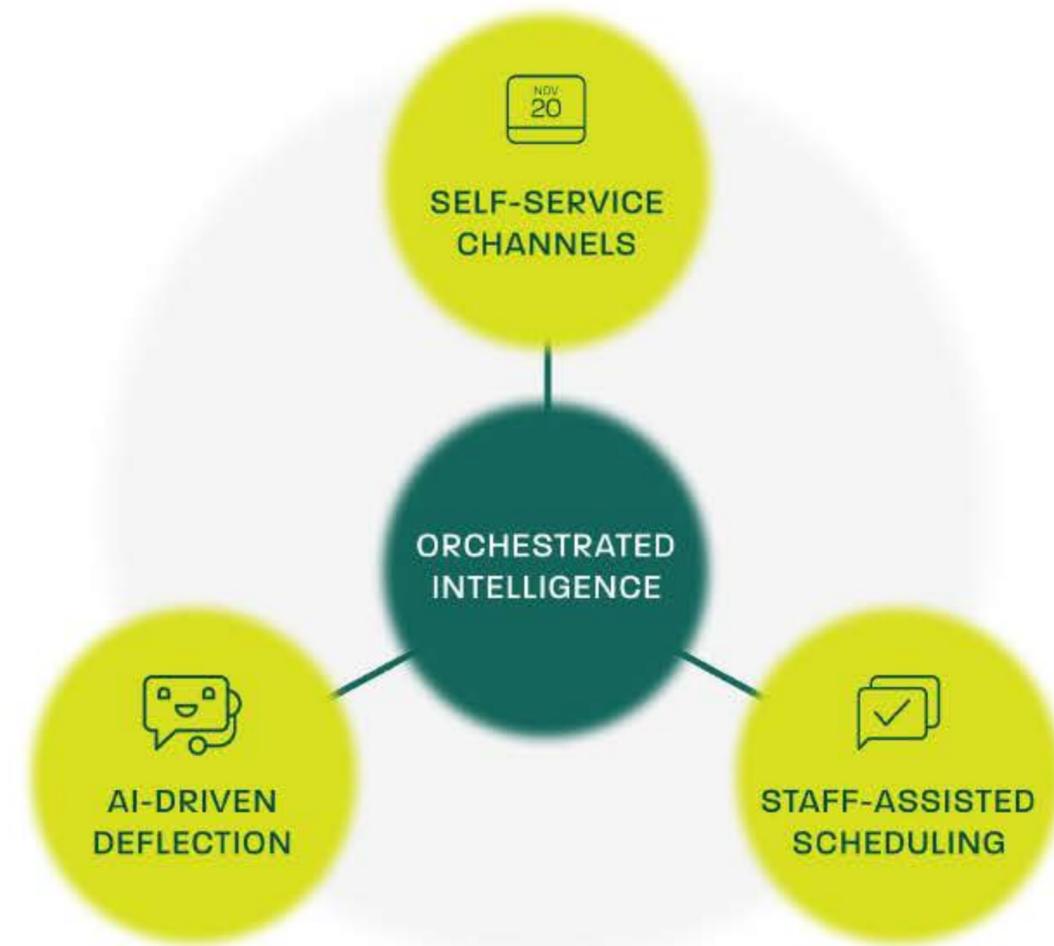
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See Dash in Action

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