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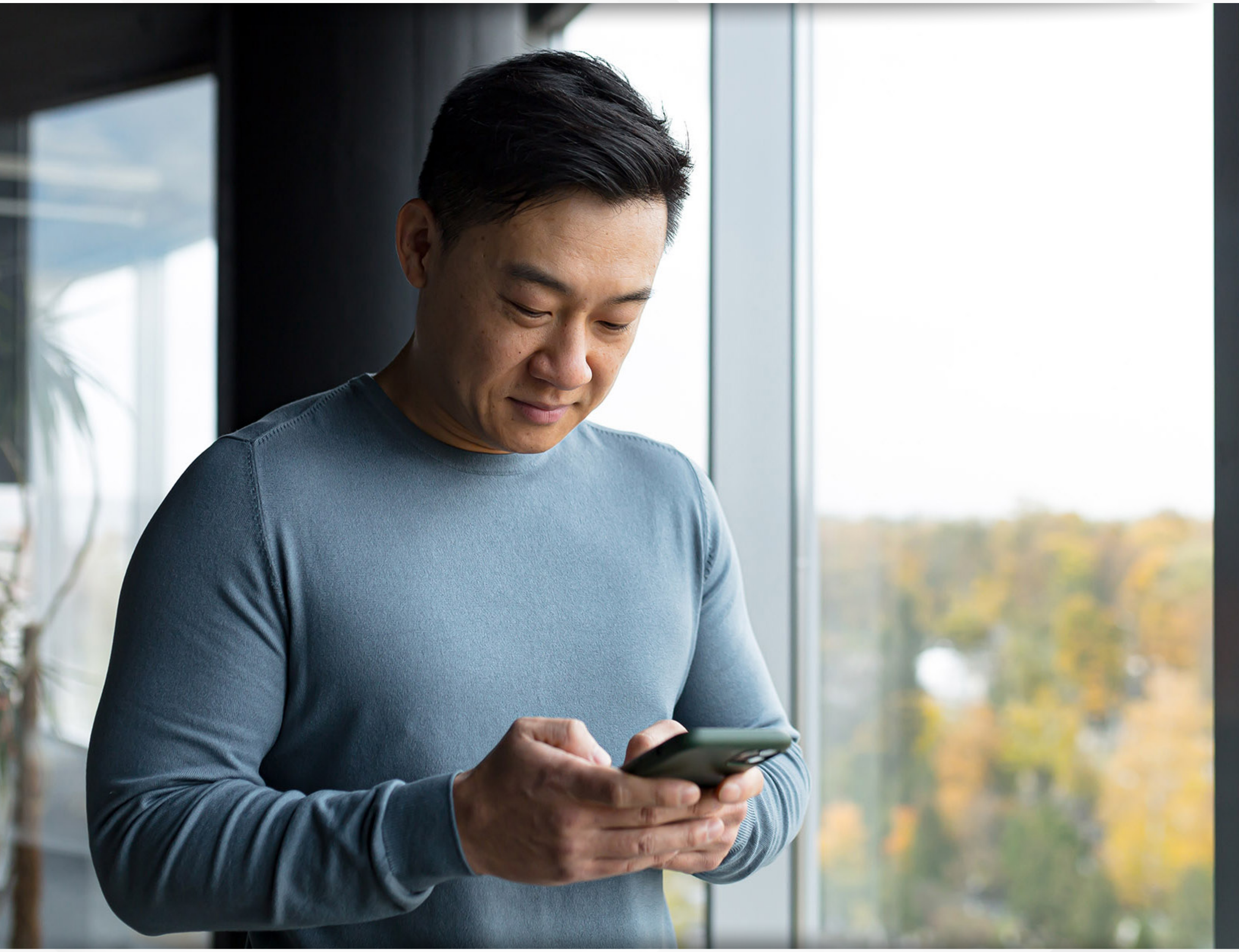
Segment Insights



Patient Engagement Ecosystem 2023

An Update on Vendor-Reported Capabilities

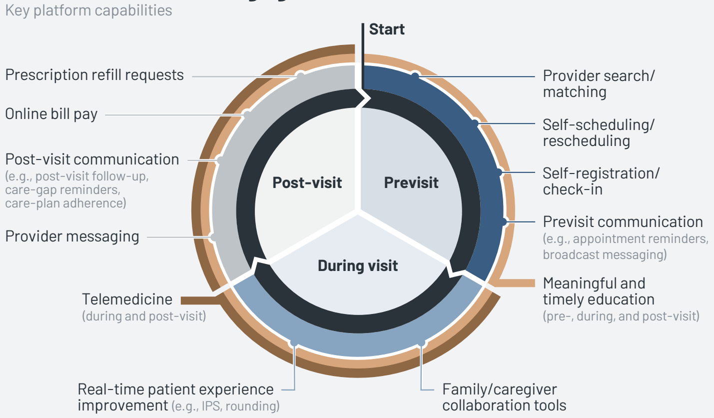
Performance Report | **July 2023**

Patient Engagement Ecosystem 2023

An Update on Vendor-Reported Capabilities

Amid the pressures of today's economic environment, healthcare organizations are investing heavily in patient engagement technology to help reduce costs, alleviate staffing challenges, and consolidate technology in other areas. Both provider and payer organizations seek to understand what patient engagement capabilities vendors offer that can meet their core needs. This study (along with additional deep-dive content that will be published on KLAS' website) is an update to KLAS' 2021 report and shows which vendors report the broadest capability sets, which vendors have made the most progress over the last two years, and how the industry as a whole has matured. For reader ease, links to relevant online content are provided where applicable. **Note that the data in this study is based primarily on vendor-reported information**, accompanied by a limited amount of KLAS performance data.

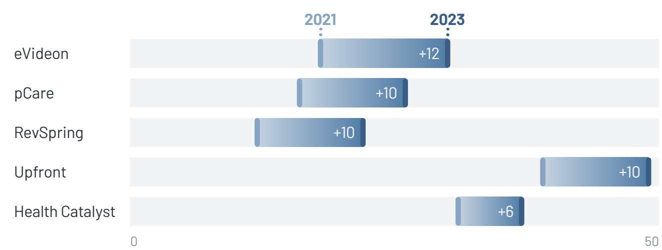
The KLAS Patient Engagement Platform†
Key platform capabilities



† The term "platform" refers to a set of software products, modules, or offerings that is provided by a single vendor and addresses a variety of patient and provider needs. It does not refer to a technological foundation on which applications and modules can be built. Today, most platforms are composed of disparate systems integrated together; the platform of the future will present a consolidated experience for patients and providers.

At KLAS' 2019 Patient Engagement Summit, vendor and provider executives helped refine KLAS' patient engagement framework and, using the patient voice as a guide, helped define the key platform capabilities that are most important for healthcare organizations to leverage and for vendors to create. Those capabilities form the KLAS Patient Engagement Platform. This summit group also identified other patient engagement capabilities, some patient-centric, some provider-centric (see page 7 for a full list). This study examines all three types of capabilities (key platform capabilities, other patient-centric capabilities, and other provider-centric capabilities). Vendors were asked to self-report which capabilities are available to customers today and the depth of adoption among their customer base. Note that KLAS intends to update the Patient Engagement Platform following the Patient Engagement Summit in November 2023.

Vendors with Most New Capabilities
# of reported capabilities (2021 vs. 2023); includes key platform capabilities and other capabilities. Vendors ordered by size of increase, then alphabetically.



eVideon, pCare, RevSpring, Upfront, and Health Catalyst Report Largest Growth in Capabilities since 2021

Most vendors in this study say they have expanded their number of capabilities since 2021. However, eVideon, pCare, RevSpring, Upfront, and Health Catalyst stand out for having the largest increases in their reported capabilities over the past two years. Further, KLAS performance data shows that the majority of these five vendors are rated above the market average for delivery of new technology (Health Catalyst is the exception). **eVideon**, whose focus is interactive patient technology, has grown their Vibe Health platform (announced in February 2022) by adding capabilities around prescription refill requests, communication, risk management, care management, the triage/symptom checker, and more. **pCare** has built upon their interactive patient solution by adding capabilities—e.g., care plan adherence, patient-reported outcomes, and care management tools—to engage patients' family members, communicate with patients before their visit, and follow up with patients post-visit. **RevSpring** has combined their former Talksoft product with their patient financial engagement capabilities and added key platform capabilities like self-scheduling, preregistration and check-in, and previsit education. They have also focused on the patient experience with capabilities such as triage/symptom checker and a virtual waiting room. **Upfront**—who acquired PatientBond in August 2022—has augmented their patient communication capabilities primarily with new financial tools such as online bill pay, text to pay, automated self-service payment plans, and billing details. The vendor also added capabilities for provider search, prescription refill requests, and reputation management. **Health Catalyst** (who focuses on AI and value-based care) acquired Twistle in June 2021 and has built upon the patient-driven care management capabilities, adding tools for care-setting guidance, prescription refill requests, shared decision-making, longitudinal care planning, and reputation management and advertising.

Patient Engagement Overview—Vendors Measured by KLAS

Overall performance scores calculated using data from 18-month window; some vendors' data combines multiple KLAS-measured patient engagement products. Vendors ordered alphabetically.

KLAS Emerging Solutions report
Click on icon to access report online

Customer organization types
Based on vendor-reported information
Ribbon=vendor-reported primary customer type

IDN/health system · Standalone hospital · Outpatient/ambulatory · Post-acute care† · Home health · Payer/insurer · Employer/private

Overall performance score (100-point scale) *Limited data
Patient engagement market average

# of key platform capabilities‡ Based on vendor-reported information (scale 1–12)

# of other capabilities‡ Based on vendor-reported information
Patient-centric (scale 1–22) · Provider-centric (scale 1–16)

Vendor	n	Overall performance score
Amwell	(n=53)	72.3
Andor Health	(n=11)	84.3*
Artera (WELL Health)	(n=34)	87.3
athenahealth	(n=62)	83.2
Avidex	(n=18)	87.8
Carium	(n=9)	87.9*
CipherHealth	(n=39)	87.0
Clearwave	(n=8)	89.9*
eClinicalWorks	(n=20)	61.5
Elsevier	(n=16)	85.8
Epic	(n=153)	88.7
eVideon	(n=18)	89.6
Feedtrail	(n=16)	94.4
FinThrive	(n=26)	76.6
Flywire	(n=21)	88.2
Get Well	(n=62)	83.9
Gozio	(n=12)	92.8*
Greenway Health	(n=49)	78.5
GYANT	(n=6)	85.8*
Health Catalyst	(n=16)	82.7
HealthTalk A.I.	(n=7)	97.1*
Healthwise	(n=30)	89.5
Huron	(n=19)	90.3
Innovaccer	(n=7)	95.3*
Kyruus	(n=9)	83.4*
Luma Health	(n=52)	86.4
MEDITECH	(n=12)	84.2*
ModMed	(n=13)	87.9*
NextGen Healthcare	(n=64)	70.3
Notable	(n=13)	88.7*
NRC Health	(n=84)	86.9
Oneview Healthcare	(n=8)	80.0*
Oracle Health (Cerner)	(n=27)	72.0
Orbita	(n=7)	86.2*
pCare	(n=30)	93.7
PerfectServe	(n=9)	82.3*
Phreesia	(n=98)	84.3
Press Ganey	(n=57)	81.1
Quality Reviews	(n=11)	92.6*
Qualtrics	(n=15)	88.9

50.0 — 100.0

† Includes long-term care, skilled nursing, etc.

‡ Capabilities above reflect only those that are live and offered directly by the vendor. For a full list of offered capabilities and greater visibility into capabilities available through third-party partnerships or on vendors' road maps, visit the Patient Engagement Ecosystem webpage, which will soon be published on the KLAS website.

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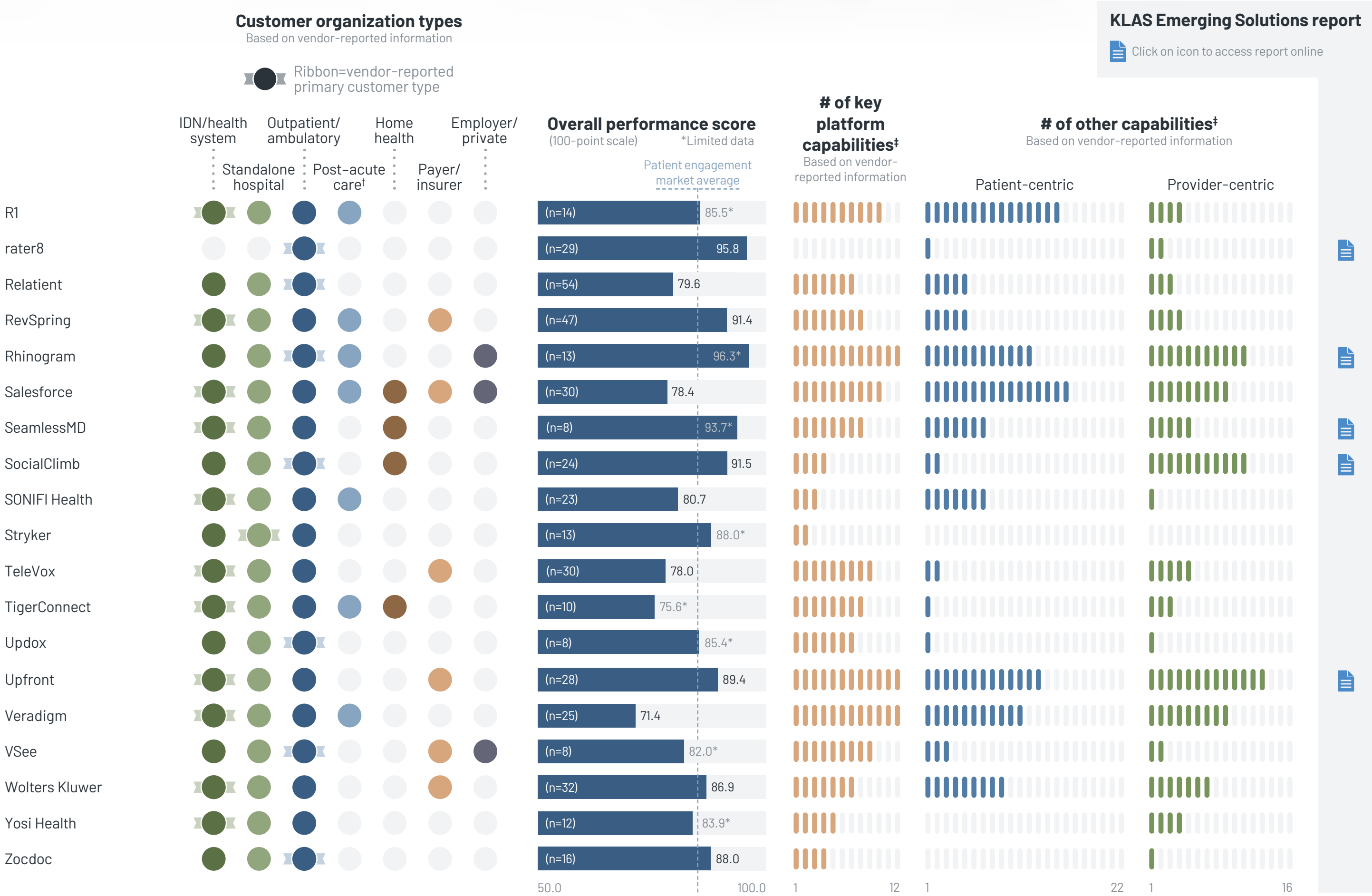
Patient Engagement Overview—Vendors Measured by KLAS

Overall performance scores calculated using data from 18-month window; some vendors' data combines multiple KLAS-measured patient engagement products. Vendors ordered alphabetically.



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Epic Continues to Lead in Capability Breadth among Health System–Focused Vendors; Salesforce and Get Well Also Offer Broad Solutions

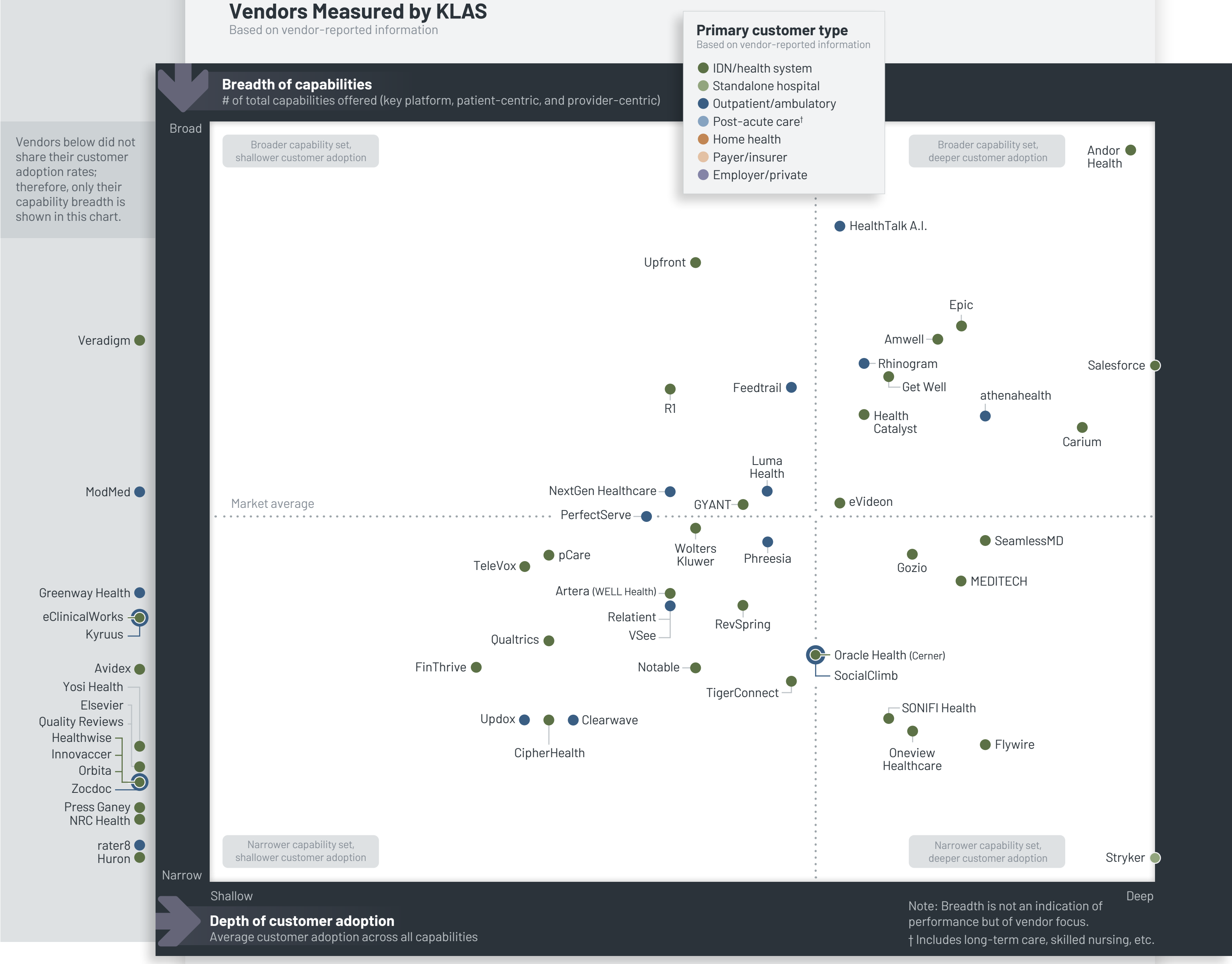
Compared to other types of healthcare organizations, health systems are the most likely to have moved beyond basic patient engagement use cases and deepened their ability to engage with patients. Thus, they are the primary customer type of many of the vendors in this study. Among the most feature-rich patient portals, **Epic** MyChart continues to be a leader in terms of capability breadth and is supported by additional engagement tools, including MyChart Bedside, Cheers (additional campaign features announced in 2022), and patient financial engagement capabilities that Epic has continued to develop.

Get Well focuses on patient-driven care management and has continued to expand their capabilities that follow the full patient journey, including preparing for a procedure, engaging during the hospital stay, and recovering at home. The vendor's acquisitions of Loop and Docent Health have augmented their self-developed capabilities. **Salesforce** Health Cloud builds on the vendor's CRM capabilities to help organizations address specific use cases and challenges along the patient journey, such as enabling patient access to care. Currently, customers must partner with outside vendors for education and financial experience capabilities.

Andor Health (mostly RPM) and **Amwell** (mostly telehealth) both offer broad patient engagement capabilities built around their core offerings—see the 2023 Telehealth/RPM Ecosystem report for more details on these vendors.

Breadth of Capabilities vs. Depth of Adoption—Vendors Measured by KLAS

Based on vendor-reported information



athenahealth Again One of the Broadest Ambulatory-Focused Vendors; Newly Measured Rhinogram and HealthTalk A.I. Also Report Broad Capabilities

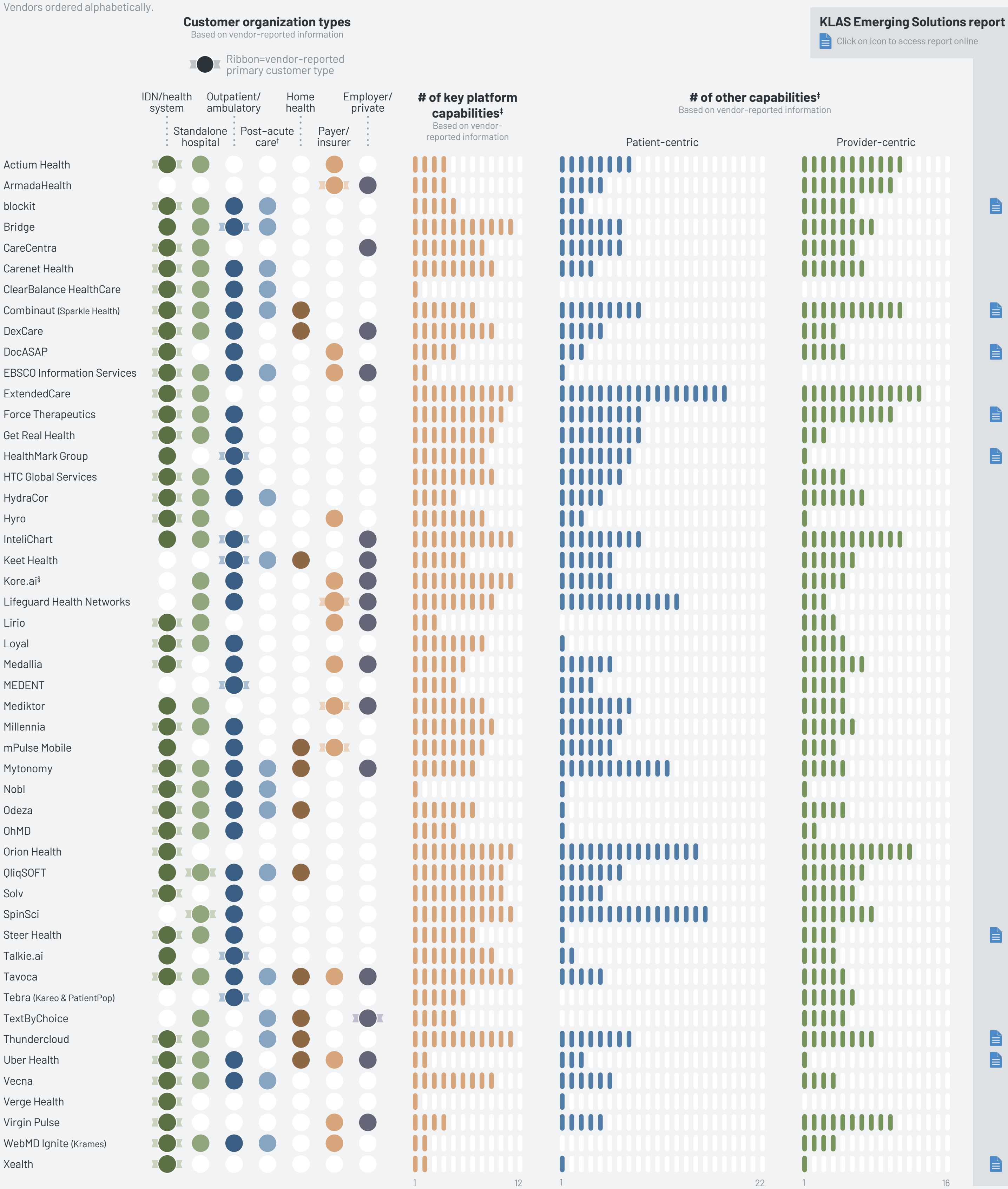
Most patients' healthcare touchpoints take place largely in an ambulatory setting, where organizations rely on patient portals and other tools to deliver information to patients, help patients communicate with the organization, and empower patients with capabilities such as self-scheduling and bill pay. Among the vendors who focus on ambulatory organizations, EMR vendor **athenahealth** continues to be a leader in the number and type of capabilities offered. athenaCommunicator provides nearly all platform capabilities, and athenahealth continues to enhance the scheduling, check-in, and patient outreach capabilities. **Rhinogram**, a newer entrant to the market, offers a solution centered on patient communication that is intended to engage patients in ways that offload work from front office staff. Rhinogram claims all 12 platform capabilities, and early feedback from customers suggests that the solution drives desired outcomes. Another recent market entrant, **HealthTalk A.I.**, focuses on conversational AI and also claims to offer a full suite of platform capabilities. Their digital front door and automated scheduling assistant are intended to improve patient access to care, while their automated patient outreach for things such as care campaigns can help improve operational efficiency.

Vendors Not Yet Measured in Patient Engagement

On KLAS' radar for patient engagement, additional vendors shared information about their customer bases, capabilities, and customer adoption; to date, KLAS does not yet have enough customer feedback on these vendors to show their performance in patient engagement. As KLAS continues our research efforts, vendor-reported capabilities will be further validated.

Patient Engagement Overview—Vendors Not Yet Measured in Patient Engagement

Vendors ordered alphabetically.



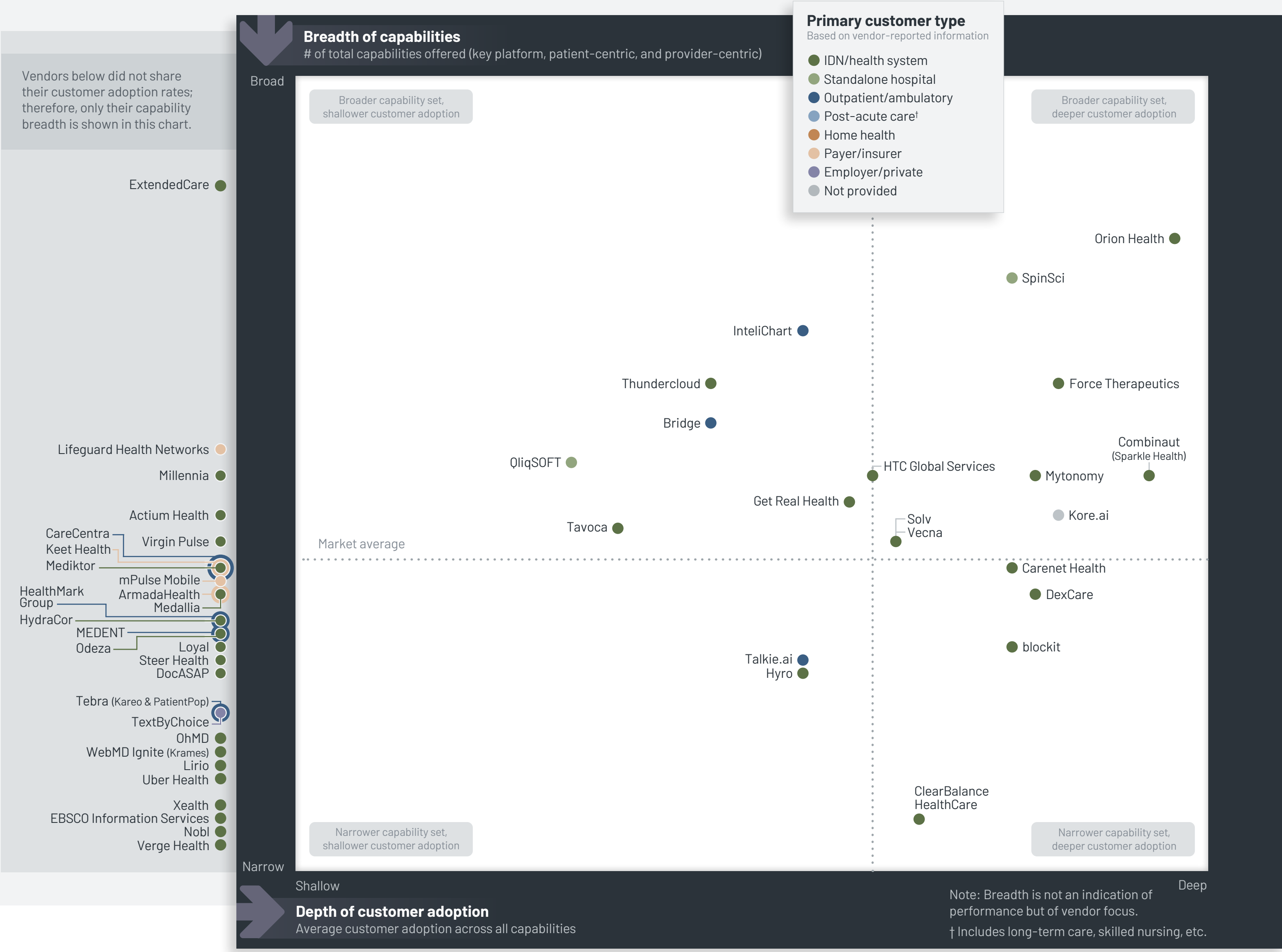
† Includes long-term care, skilled nursing, etc.

‡ Capabilities above reflect only those that are live and offered directly by the vendor. For a full list of offered capabilities and greater visibility into capabilities available through third-party partnerships or on vendors' road maps, visit the Patient Engagement Ecosystem webpage, which will soon be published on the KLAS website.

§ Vendor didn't share primary customer organization type.

Breadth of Capabilities vs. Depth of Adoption—Vendors Not Yet Measured in Patient Engagement

Based on vendor-reported information



Note: Breadth is not an indication of performance but of vendor focus.

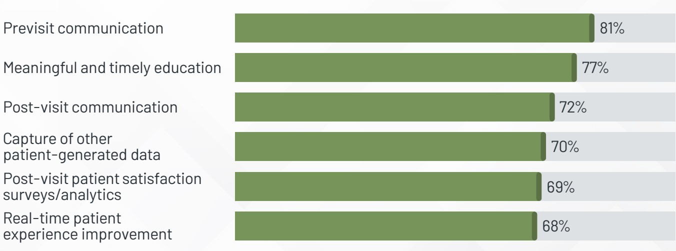
† Includes long-term care, skilled nursing, etc.

Industry Progress

The COVID-19 pandemic accelerated adoption of many digital health capabilities. As the industry emerges from that rapid growth period, organizations are looking for solutions to help them with current challenges such as staff turnover and burnout, razor-thin or negative financial margins, and increased consumer demands. Patients increasingly want to be empowered in their care journey; as a result, vendors continue developing and providers continue investing in capabilities like **self-scheduling** and **self-registration**. Other capabilities like **online bill pay** and **prescription refill requests** have also received significant development in the past two years.

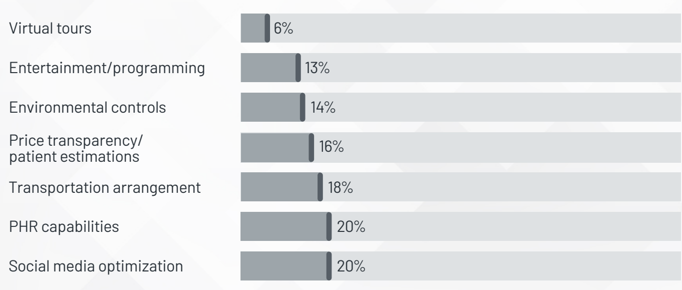
Most Commonly Offered Capabilities

Based on vendor-reported information on key platform, patient-centric, and provider-centric capabilities; ordered by percent of vendors offering capability (high to low) (n=108)



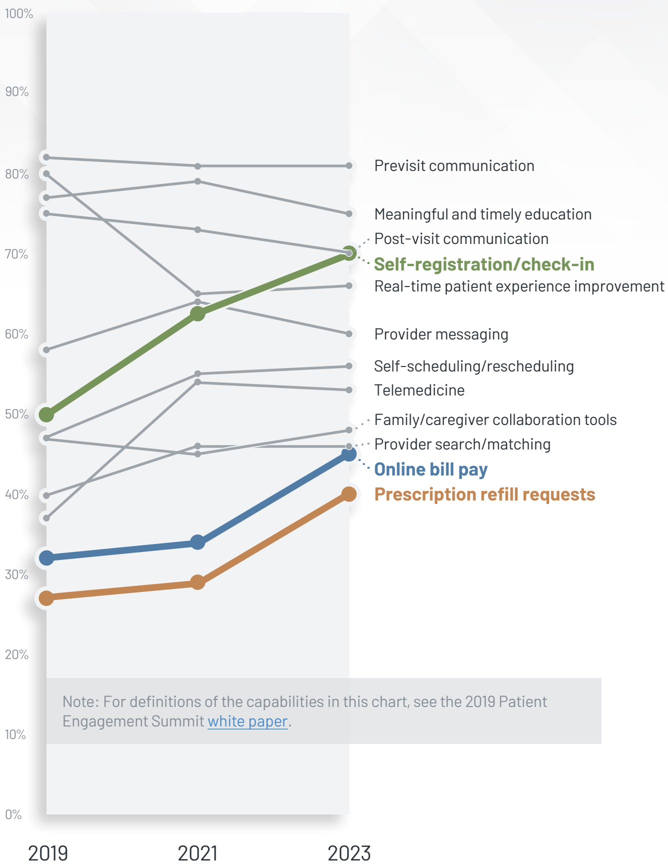
Least Commonly Offered Capabilities

Based on vendor-reported information on key platform, patient-centric, and provider-centric capabilities; ordered by percent of vendors offering capability (low to high) (n=108)



Key Platform Capabilities, 2019–2023

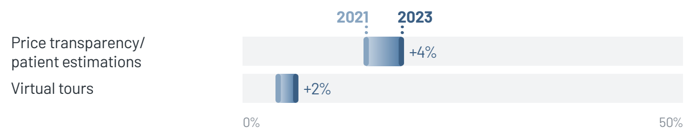
Percent of vendors reporting each key capability; based on vendor-reported information (n=108)



Beyond the key platform capabilities, a couple of other patient-centric capabilities have seen growth since 2021. **Price transparency** is one that has seen some of the most growth, given that the United States has recently passed legislation related to healthcare price transparency (see KLAS' 2022 Price Transparency report). However, there is still room to grow, as only one in five patient engagement vendors offers price transparency capabilities. **Virtual tours**, while still mostly delivered by niche vendors focused on that area, have had increased development by broader patient engagement vendors since 2021.

Other Patient-Centric Capabilities—Areas of Growth, 2021 vs. 2023

Percent of vendors reporting capability; ordered by size of increase (n=108)



Facing a difficult financial picture, healthcare organizations are working to attract and acquire patients to improve financial margins. Two provider-centric capabilities stand out for their growth year over year: **marketing campaigns** and **reputation management** capabilities. Both help organizations retain market presence and resilience and also get the message out about their services and the quality of patients' experiences.

Other Provider-Centric Capabilities—Areas of Growth, 2021 vs. 2023

Percent of vendors reporting capability; ordered by size of increase (n=108)

Looking for More?

KLAS intends to soon publish our Patient Engagement Ecosystem webpage, where readers can learn more about the vendors and capabilities listed throughout the report.

Patient Engagement Capabilities Index

Key Platform Capabilities

Previsit

- Provider search/matching
- Provider profile/quality data
- Care-setting guidance
- Self-scheduling/rescheduling
- Self-registration/check-in
- Preregistration forms/intake
- Appointment reminders
- Broadcast messaging
- Previsit education/instructions

During visit

- Family/caregiver collaboration tools
- Virtual visits
- On-site education
- Real-time patient satisfaction
- Surveys/analytics

Post-visit

- Discharge education/instructions
- Wellness education
- Remote patient monitoring
- Provider messaging
- Post-visit follow-up
- Care-gap reminders
- Care-plan adherence reminders/tracking (e.g., medications)
- Online bill pay
- Bill details/explanations
- Prescription refill requests

Other Patient-Centric Capabilities

Previsit

- Triage/symptom checker
- Price transparency/patient estimations
- Online patient guides/directions
- Virtual tours
- Transportation arrangement
- Visit-planning tools

During visit

- Shared decision-making tools
- Provider care-team visibility
- Care-plan/schedule visibility
- Patient access to requests/orders (e.g., meals)
- Environmental controls
- Service-recovery tracking
- Entertainment/programming
- Mapping/geolocation (inside and outside facilities)

Post-visit

- Capture of other patient-generated data
- Tracking of patient-reported outcomes
- Longitudinal care planning
- PHR capabilities
- Patient self-assessments
- Online coaching

Other Provider-Centric Capabilities

Organizational promotion/outreach

- Contact management
- Market intelligence/analytics
- Marketing campaigns
- Community/social media tools
- Social media optimization
- Reputation management
- Advertising
- White labeling

Organizational decision-making

- Risk assessment/analytics
- Care-gap identification/reminders
- Access to social determinants of health
- Post-visit patient-satisfaction surveys/analytics
- Care management/care planning tools
- Referral management
- Transitions-of-care planning

Report Information

Share your experience with peers.
Take a short survey about your patient engagement solution.

About This Report

This study is designed to give payer and provider organizations a clear picture of what capabilities vendors offer to meet their core patient engagement needs. Most data in this study comes from **vendor-reported** information.

A limited amount of KLAS performance data is also shared. Interviews were conducted over the last 18 months using KLAS' **standard quantitative evaluation** for healthcare software, which is composed of 16 numeric ratings questions and 4 yes/no questions, all weighted equally. Combined, the ratings for these questions make up the overall performance score, which is measured on a 100-point scale.

A vendor's sample size for performance data may not reach KLAS' required threshold of 15 unique respondents; when a vendor's sample size is less than 15, their score is marked with an asterisk (*) or otherwise designated as "limited data." If the sample size is less than 6, no score is shown. Note that when a vendor has a low number of reporting sites, the possibility exists for KLAS scores to change significantly as new surveys are collected.

Note: This report used a data collection window of 18 months to better represent the vendors on which KLAS has collected data. KLAS' 2023 Telehealth/RPM Ecosystem report, which includes some of the same vendors found here, used a data window of 12 months.

Note

Performance scores may change significantly when additional organizations are interviewed, especially when the existing sample size is limited, as in an emerging market with a small number of live clients.

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Our Mission

Improving the world's healthcare through collaboration, insights, and transparency.

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