

Patient Access Center Best Practices and KPI Benchmarks

Your patients live, work, and shop in a connected world revolving around the consumer. As patient choices diversify, creating a seamless access experience – phone, online, and mobile – is more critical than ever. To compete, your access channels must meet patients where they are.

We've compiled these best practices to help you size up where you are on your access journey. From centralizing access to scaling operations to creating an integrated digital strategy, Tegria has the experience to help get you there.

Category	Best Practices	Benchmark KPIs
Structure	<ul style="list-style-type: none"> An integrated Access Center provides one stop service for all specialties and locations Scheduling, financial clearance, nurse triage, and prescription refill services are all available within the Access Center The Access Center is powered by omni channel service software (phone, chat, online) 	<ul style="list-style-type: none"> First Contact Resolution > 80%
Services	<ul style="list-style-type: none"> Customer service and operator/PBX lines are live answered 24/7 Scheduling and care service lines are available beyond regular business hours Specialized access services are available for referring providers 	<ul style="list-style-type: none"> Abandonment Rate < 5% Call Service Level > 80% in 20 sec MyChart Messages > 95% in 4 hours
Workforce Planning	<ul style="list-style-type: none"> Service is monitored through real-time reporting and quality management platforms Agent staffing is managed through integrated workforce planning tools Productivity is tracked at the team and agent level against established benchmarks 	<ul style="list-style-type: none"> Agent Turnover Rate < 15% External Turnover Rate < 5% Agent Occupancy 85% - 90%

Training & Quality

- Metrics dashboards are designed to meet the needs of designated audiences, such as front-line operations and executive leadership
- A training and coaching program equips agents for success and ensures consistent service delivery
- A real-time knowledge management tool serves as the only reference tool for agents
- Calls are recorded and agent performance is monitored by dedicated Quality Analysts
- Agent Quality Rating > 90%
- Audit 2 calls per Agent per Week

Provider Capacity

- Provider schedules are aligned to clinical time expectations (cFTE, etc.)
- Capacity is monitored and managed at the specialty and provider-level
- No show and late cancellation rates are tracked and actively managed
- Schedule Utilization > 90%
- 3rd Next Available Appt < 7 days
- Same Day Availability
- No Show + Late Cancel Rate < 10%

Scheduling

- Schedulers can make appointments for all services and providers
- Decision trees guide to the correct specialty, provider, and visit type
- Referred patients are contacted and scheduled within 24 hours
- One Call Resolution > 90%
- Referred Patients Called < 24 hours

Nurse Triage & Care Assistance

- Prescription refills and care requests are available within the Access Center
- Nurses are available in the Access Center for real-time triage of urgent medical issues
- Care providers are focused on patients in their clinics, and not on phones and messages
- Urgent Triage < 15 minutes
- Non-Urgent Triage < 2 hours

Financial Clearance

- Price estimates and financial counseling are available
- Pre-registration is complete and insurance is verified at time of scheduling
- Authorizations are obtained in advance of the date of service
- Financial Clearance Rate > 98%
- Front-End Related Denials < 5%

Digital Engagement

- Patients can schedule, register, and complete check-in activities online
- Patients can complete clinical questionnaires, view test results, request prescription refills, and communicate with their provider online
- Patients can view and pay their bills online
- Patients receive automated confirmations with the ability to cancel via text or callback option
- MyChart Enrollment > 80%
- Online Scheduling Rate > 30%

Exceptional Patient Experiences Start With Access

Let's build or optimize your patient access center for today's consumer. Whether you have a few questions or you're facing large obstacles, we're right beside you, ready to solve, resolve, and wow.

Tegria provides consulting and technology services to help organizations of all sizes humanize each healthcare experience. Founded by Providence, with teams throughout the United States and internationally, Tegria is comprised of more than 3,500 colleagues who help their customers integrate technology, transform operations, accelerate revenue and optimize care. To learn more, visit tegria.com.