

AUTOMATE LETTER GENERATION

- Faster patient communication
- 2 FTE of staff time saved and redirected
- Manual errors eliminated
- Improved staff working experience



Improving Care Amid Turnover

HopeHealth, a South Carolina FQHC with nearly 60,000 patients, experienced turnover of about 60% in their patient care advocate (PCA) team in the spring of 2022. PCAs schedule referral appointments and send patients letters with appointment details. With fewer PCAs, it was hard to keep up with the letter volume. HopeHealth wanted to reduce turnover for new PCAs and ensure they could work efficiently and consistently, setting more appointments and sending information out faster.

Identifying Referral Roadblocks

The PCA team couldn't always send letters the day they set appointments, so patients got their information with less time to plan. HopeHealth requires that letters be sent at least a week before appointments. With the deadline hard to meet, some letters wouldn't get sent at all, leaving patients without reminders or important instructions. Those patients were more likely to no-show, impacting their care. That also impacted HopeHealth's relationships with its referral partners, who could be less inclined to accept referrals for patients who were likely to miss their appointments.

The Challenge: Tedious Daily Work

Each letter took around ten minutes to generate, requiring 16 or more hours daily.

Producing the letters manually was tedious, and cut into the time PCAs needed to schedule new appointments. "It was the last thing they wanted to do," said Debby Mays, Clinical Projects Manager. During the manual letter-generating process, PCAs could also accidentally select the wrong letter template or enter incorrect data in the patient's record, leading patients to receive incorrect information.

Automated Letters and Tracking

HopeHealth worked with Trumpet to automate their referral letter production. Their bot "Lettie" now produces 100% of HopeHealth's referral letters the same day appointments are scheduled, adds notes to the patient's EMR record, and assigns follow up tasks to the scheduling PCA.

"We're getting letters out faster with more accurate information. That gives us time to set more appointments and serve more patients."

- Debby Mays, Clinical Projects Manager

Saving Time. Improving Care.

Lettie saves about 2 FTEs worth of time, and helps the PCA team stay more productive with fewer interruptions. PCAs use this time to set more appointments, getting patients in sooner and improving their quality of care. As appointment volume grows, Lettie will keep up, saving even more staff time as referrals increase.