

Barb McLaughlin



Barbara's expertise is HOW TO COMMUNICATE EFFECTIVELY with a focus on Healthcare. A lot of the information presented to patients is not remembered, understood or complied to.

Barbara's life's passion is to help patients navigate and comprehend the healthcare world so they are not so frightened and upset by the mere process.

Barbara worked with Smart Source to create a series of products and services whose primary function is to educate and communicate to the patients. Visit our website at www.hand-holder.com and see how we meet this challenge. Then send us your comments and ideas so you too can help take care of everyone and feel good about your life every day!

Twenty Steps for AI Success in Patient Access and Operations

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Every time you open your computer you are bombarded with ads for the latest AI offering- many under different names like "Agentic AI," which is specifically pointed to healthcare applications. So how do you tell one from another? How do you know which one really works and which one will help with the specific problems you are trying to address?

Here is a list of 20 items to review before selecting a supplier:

1. Make sure your AI provider has implemented their solution; that they are installed and working.
2. Barring the above, make sure you have a supplier who listens carefully to your needs and has the staff and expertise to build what you want.
3. Get frequent and regularly scheduled meetings to monitor progress and continually test. Continuous improvement is important for success.
4. Ask for staff and patient input continually so you know where the weak points are and so improvements can be made quickly.
5. Evaluate and optimize your phone systems to ensure they can handle peak call volumes and sustained conversations with the agents without compromising performance. This is important for foreign language conversation support.
6. Verify that the pricing for each module is fair and consistent. What foreign languages does your supplier support? At what cost?
7. Monitoring calls constantly should be a primary function of your supplier along with your staff. This enables you to proactively uncover errors or address possible overlooked queries by patients.
8. Ensure calls are recorded for future access. This can be critical in the case of legal issues and insurance verification. How long will your supplier store the calls without additional charges? Does this include call scripts?
9. Safeguard conversation continuity, particularly when an interaction is transferred to a live agent. The agent should be able to view the complete conversation history so that patients, providers, and insurance representatives do not have to repeat their information or restate their issue.
10. Anticipate as many scenarios as possible- this is where knowledge, experience, and the ability to listen truly plays into the skills and abilities of the supplier.
11. Partner with experts who bring real-world healthcare experience and firsthand knowledge of the industry's complexities—because understanding



technology is not enough! A deep understanding of healthcare is the “Gold Standard” for success.

12. Choose an agentic supplier that prioritizes listening to the people closest to the work performed. By actively seeking the input of the people who perform the functions currently, the supplier can get a clear picture of what’s needed.
13. Question if your supplier can demonstrate success to help serve your WHOLE patient population. Foreign language experience is critical to the success of most healthcare applications and should not bear expensive set-up costs.
14. Consider pilot programs for verification of programming as these are essential to the success of the program. Accuracy in healthcare is not nice to have; it is a must have! Patients’ lives may be at stake. It is critical that all applications are extensively tested.
15. Select a supplier that will customize each application to the extent that it is quickly usable. Physician preferences are key to success and must be tested. While open scheduling is nice, most physicians have specific instructions, i.e. when they will see new patients, what cases they will not handle, and when quick routine visits can be easily accommodated for 15-minute slots.
16. Are all your agentic needs being met by a single supplier or do you need to address things piecemeal to accomplish your goals? If not, are they capable of building what you want quickly and accurately? Check what functions your supplier has implemented and what they know and understand about healthcare requirements.
17. Is the new patient onboarding/registration an easy, automated process or do you need large staff volumes to get a patient into your systems/EMR? Is it self-serve or people powered? Is training available? (For staff and patients)
18. Ask yourself - Is your patient communication/education adequate to support and sustain the automation? Patients must understand and cooperate for the programs to be successful.
19. Demand more than software delivery. Confirm support and training remain key aspects of this endeavor. Training documents and/or videos must be easily accessible, consistent and comprehensible, and available in multiple languages. Do not accept a program that just delivers software and then disappears, leaving it to your staff to make it functional.
20. Beware of hidden fees! Are there extraordinary API fees, or other hidden fees for every connection whether successful or not? Are there extreme after-hours fees? Virtual Agents work 24/7 and the cost should not change depending on time frames.

Use these twenty considerations as a guide to evaluate potential suppliers and ensure that your investment is built on a foundation of healthcare knowledge, operational standards, and a long-term commitment to your success.

Smart Source Healthcare

...the right solution should improve patient access, support staff, enhance operational efficiency, and deliver measurable value without adding unnecessary complexity or cost.