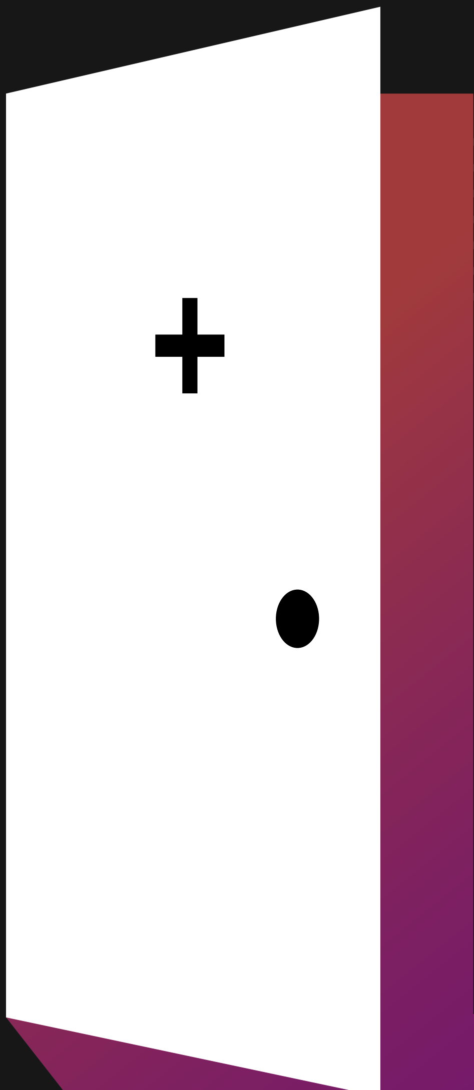
DIGITAL FRONT DOOR



The Remix

The Evolution of the Digital Front Door in Healthcare

Phase2

Digital Front Door: The Remix

The remarkable thing about the Digital Front Door (DFD) is that two people can confidently speak about it and be talking about entirely different things. After more than 20 years of industry evolution and advancements in technology, health systems occupy a wide variety of DFD maturity levels.

No matter your definition, the focus is easy access and satisfying engagement for consumers. With consumer expectations rising as fast as digital investments in the DFD, we are entering an era where it will be fully realized — personalized, anticipatory, and complete.

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Two Decades of Digital Front Door

Universal, but often misunderstood, the DFD evades a singular definition. And it is no wonder, since the shape and maturity of the DFD has transformed from simple portals to fully integrated digital experiences.

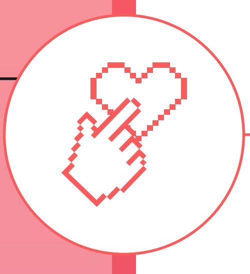
Today, we recognize the DFD to mean: **A centralized hub for patients and caregivers to manage patient health, offering personalized care pathways and support tools.** This can include patient portals, self-scheduling, pre-registration, chatbots, digital finance, digital waiting rooms, and digital wayfinding.

For many organizations, the DFD has never been fully realized, and implementation by leading health systems has been varied and inconsistent.

To understand the future, let's consider how we got here.

EARLY 2000s

In 2003, HIPAA's Privacy Rule is implemented, establishing standards for PHI in the digital age.



Wide adoption of EHRs

CONSUMER EXPECTATIONS

Low consumer expectations for digital health services

DESKTOP

Patients begin to seek health information online

- Brochure websites
- Operating hours, locations, directions, basic business listing info
- No authenticated experience

LATE 2000s

The HITECH Act of 2009 incentivizes health systems to adopt EHRs and sets standards for secure electronic transmission of health information

Early patient portals

- First authenticated experience
- Patient-focused
- View health info, schedule appointments, communicate with providers

CONSUMER EXPECTATIONS

Consumer expectations rising

Huge discrepancy between in-person and online experiences

EARLY 2010s

A 2010 Pew Research Center report noted that 17% of cell phone users had used their phones to look up health or medical information.

Widespread adoption of smartphones

Early mobile health apps

- Mobile access to health information
- Calendar integrations
- SMS integrated reminders
- Secure communication with care teams

The Affordable Care Act creates health insurance exchanges

The term "Digital Front Door" first emerges

MID 2010s

By 2017, there were over 325,000 health-related mobile apps available

First telehealth instance emerges

In 2016, the 21st Century Cures Act promotes information interoperability and specific point solutions become more popular

Mobile health apps become mainstream

CONSUMER EXPECTATIONS

Major differences in consumer preferences - generational, access, etc

External market digital experiences raising the expectation bar

"Looking at what healthcare providers need to get right in order to ensure a satisfactory experience, four things stand out: ***scheduling an appointment (47%), being treated as an individual (39%), finding a doctor in network (30%), and clear communications from healthcare providers (30%).****"*

—Phase2 Digital Patient Experience Survey 2017

LATE 2010s

Integration and personalization

- Communications and recommendations are largely personalized
- Efficiency and service improves through data integration
- Early AI and machine learning models are accepted for integration

DESKTOP + MOBILE

Adoption trends: varied

- Most health systems have some version of a DFD, but maturity varies wildly from simple portals to sophisticated and integrated digital experiences

2020

COVID-19 is an incredible disruptive force and accelerator in healthcare

The CMS Interoperability and Patient Access Rule of 2020 ensures patients have access to their health information — incentivizing portable health information

Rapid DFD advancement

- Telehealth explodes
- Virtual triage, check-in
- Online Covid assessments
- Vaccine schedulers
- Integration with other healthcare services

CONSUMER EXPECTATIONS

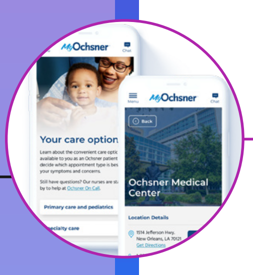
COVID changes everything - consumer expectations, digital and telehealth capabilities, consensus driven approach to DFD

Two years of healthcare digital transformation got accomplished during the first two months of the COVID-19 pandemic.

—IDC

2021 - 2024

Major disruptive entrants into the market create new levels of competition and challenges to longitudinal care



New avenues of competition fuel truly integrated DFD experiences

- Focus on uniting authenticated and unauthenticated states
- Integration of AI becomes commonplace (virtual assistants, predictive analytics, etc)
- Personalized care plans are prevalent
- Health management and holistic wellness focus
- Remote monitoring on the rise

Widespread adoption of LLMs and GenAI are propelling innovation and invention at a breakneck pace

CONSUMER EXPECTATIONS

Wide spectrum of adoption and maturity

Disruptive forces supercharging consumer expectations

DESKTOP + MOBILE + AR/VR

2024 - BEYOND

The Remix

2024 – BEYOND

The Remix

If there is one constant about the DFD, it is evolution and new depths due to the constant advancement of technology solutions. Through every iteration, the DFD has delved deeper into improving patient experience.

So what is growing and developing now and what might the future hold?

Digital Literacy, Aging Populations, and Access in Sharp Focus

Between generational factors, digital literacy, and device access, health consumers express a wide variety of preferences and abilities to navigate a digital experience. In this way, the DFD must not only be a launch pad, but it must welcome audiences of all kinds with helpful personalized guidance.

True Omnichannel Consistency Between Digital and In-person Experience

Consumers are fluent in moving between digital and physical experiences with ease. In pursuit of health, this can range from a health tracker to a gym session to an online scheduler to an in-person doctor visit to a virtual follow-up, and on and on and on.

And the DFD will be the home base and the orchestrator of it all. Health systems can meet consumer demand by investing in multi-experience technologies to improve user experience across channels, devices, touchpoints, and interaction mechanisms. And in all of it, the experience must be simple and intuitive.

"We are currently integrating digital front door technology, but it isn't the only front door. We need a blend of both the human center as well as the digital approach to provide patients with optimal choices. We have a few options."

—Hospital VP from a Center for Connected Medicine Report

Disruptive Competitive Forces from Every Corner

Traditional consumer brands are making big plays in the health space, and with a head start in experience building, health systems are feeling the impact. From virtual care services like Teladoc and HealthTap to in-person clinics from Amazon (One Medical) and CVS to health data management from Apple and Google Health, consumer entrants into healthcare are increasing exponentially.

Over the next decade, nontraditional primary care providers could capture around 30% of the US market. **—Bain & Company**

Despite the likelihood of living longer, consumers of healthcare judge it based on their experience in consuming it and their out-of-pocket cost to pay for it. Consumers set the bar very high for customer satisfaction and compare healthcare to other consumer products and services. They order something from Amazon and have it at their front door in hours. They call Apple support and encounter smart, friendly, people who really care about the problem for which the caller is seeking help. **—Mhealth**

Brands like Amazon and Apple have set the standard for consumer digital experience — one that is intuitive, anticipatory, and personalized. The rise of personalization in particular has made consumers accustomed to contributing their personal information in exchange for a truly valuable and customized experience and in anticipation of better outcomes. The DFD can be a beacon of customer centricity as the entry point of a connected consumer experience.

"I would say we do have a digital front door, but it is not very good based on what is possible. For example, with an airline or hotel, people can book a service, but health care is much more complicated. For airlines or hotels, I never have to interact with a person until I show up at the hotel. We are nowhere near that in the hospital system. We can't have patients just show up to get their vital signs checked before they see the doctor without interacting with a human. There is some capability for that kind of thing, but the experience is not nearly as efficient as with the airline or hotel industry."

—CMIO from a Center for Connected Medicine Report

Revenue Generation in Balance with Consumer Experience

While investments in the DFD are ever-growing, the potential for revenue generation is growing as well. Consumer experience is at the heart of any DFD strategy because of the enormous impact to patient acquisition and retention. In addition, health systems can surface revenue generating opportunities to patients such as virtual care, online prescriptions, and site of care guidance. This is the win-win of maximizing experience and revenue opportunities.

Cohesion of Unauthenticated and Authenticated Experiences

Before a user enters identifying credentials, the DFD looks incredibly different. And as such, the authenticated and unauthenticated experiences are often managed and envisioned separately. But in the truly connected experience, the patient journey must account for both and for users to move seamlessly in and out of these two layers.

Expanding Access Beyond the Patient

While the majority of today's DFDs consider only the patient, health systems are further embracing a personalized CX approach, acknowledging the different roles in caregiving beyond the patient and provider. Caregivers, parents, children, and the care team all need different levels of information and personalization. The DFD providing role-based access and resources for all of these roles will quickly become the standard.

AI and ML Driving Efficiency and Continuous Monitoring

AI has the potential to disrupt the concept of the DFD altogether. The front door is a place you enter and leave as needed, but with AI and ML, the future is ongoing remote patient monitoring and analysis and predictive analytics for preventative care. AI virtual assistants with anticipatory care plans could mean a world where patients are always "inside" receiving care.

81%

of Leading Health System executives plan to increase spending on DFD in the next 3 years — the highest of all categories measured

—THMA

80%

of patients would change their provider solely due to convenience factors. Nearly 20% would make the switch if they're able to save $500.

—NRC Health

68%

of people are more likely to choose a medical provider who offers the ability to book, change, or cancel appointments online.

—Phase2 Research

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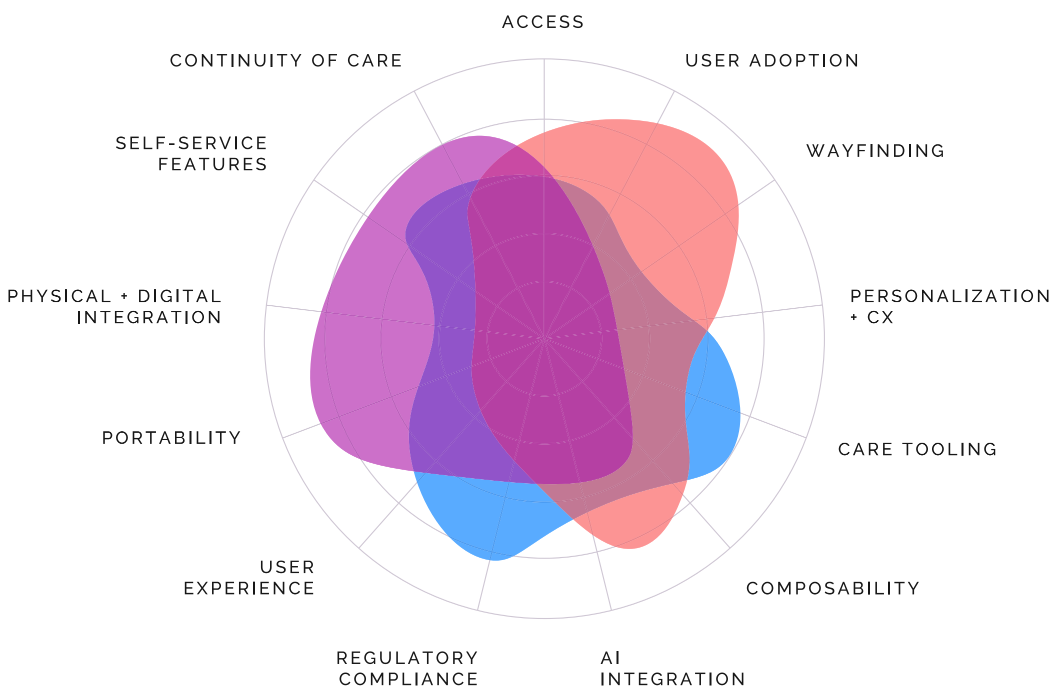
Where to Invest

Given the long and varied history of the DFD and all the facets a truly integrated experience entails, leading health systems find themselves at various levels of maturity. **When investing in a DFD, there are 13 critical factors to consider.**



81%

of Leading Health System executives have not scaled DFD solutions and 50% believe solutions are underperforming

—THMA

"Our CEO and senior leadership recognize the digital front door is critical to our success in the future, so it has been prioritized at a system-wide level in relation to our online scheduling goals, our telemedicine goals, and our MyChart sign-up goals. That initiative has been out there for two or three years at the system level, and we keep updating the overall goals that are going to help drive more digital patient engagement."

—LHS CIO from a Center for Connected Medicine report

Generally, Phase2 recommends balanced growth of these factors, but specific business cases and addressing friction points within an organization certainly indicate prioritization.

The Northwell Health DFD Story — Continuous Growth and Customer Centricity

Northwell Health®

Nearly a decade ago, Phase2 worked with Northwell Health on early iterations of their Digital Front Door. As pioneers, Northwell invested in robust user research to prioritize the initial digital front door features, according to their business goals. Over time, we have helped Northwell iterate on its Digital Patient Experience (DPX) and it has grown into a world-class experience.

"It's one of those things where you can really start anywhere and the place that we chose to start first is the patient experience. At the end of the day, that is what we are here for. We are here for caring for people... and we know that is more than just about what medication we can prescribe and what surgeries we can perform."

—Emily Kagan Trenchard, SVP, Chief of Consumer Digital Services at Northwell Health

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The Next Era

In 2024, investments in the DFD are increasing, and it is a good thing as a lot is needed to meet increasing consumer expectations and confront disruptive competitive forces.

After making DFDs for leading health systems for nearly a decade, our experts know how to guide the way to business impact. But where should you go next?

"In today's rapidly evolving healthcare landscape, investing in a robust Digital Front Door strategy is crucial for health systems looking to enhance patient access, drive revenue growth, and stay ahead of the competition. By prioritizing seamless integration, empathetic AI, inclusive design, accessibility, revenue optimization, and robust security, you can create a digital experience that not only meets the needs of your diverse patient population but also positions your organization as a leader in innovative, patient-centric care."

—Jen Segalini, VP of Strategy

The DFD has a long history, but in many ways is just starting to realize its full potential to set the standard for a connected, accessible, and effective experience. Digital experience can advance the human experience, and the Digital Front Door will continue to lead the way.

Phase2

Phase2 is your digital experience partner for healthcare. We are passionate about customer experience, grounded in data and insights, and rooted in more than two decades of successful technology delivery. We have been building digital front doors for some of the most influential health leaders in the industry for nearly a decade.

With every project we undertake, **Phase2 is health. Connected.** Your systems are complex, but a seamless, connected experience for the health consumer is table stakes. We untangle, edit, optimize, grow, and bring ease to your single connected platform. In other words, Phase2 makes digital experience that advances the human experience.

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