

How a Leading Academic Physician Practice Enhances Timely Patient Access Through Automation

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WestCX streamlines referral scheduling and enhances patient communication.

As one of the nation's largest academic multispecialty physician practices, the organization has long prioritized timely, seamless access to personalized care. The practice provides patients with the expertise of nearly 2,900 highly regarded physicians, surgeons, dentists, and nurses across more than 230 specialties and subspecialties.

In 2013, the practice established an access center to improve call scheduling efficiency and referral management, a resource-intensive process. Starting with just seven agents supporting one specialty's scheduling, the center grew rapidly as more departments recognized the value of the centralized resource. As demand for this resource grew, the team sought the right technology to keep pace with patient volumes and streamline and automate outbound referral scheduling.

Prioritizing Patient Experience Through Smart Integration

As the practice looked to expand and optimize its access center, leadership sought a solution that could integrate and utilize existing resources. This meant implementing technology that would streamline call management, such as automation. Automating outbound referral calls presented an opportunity to standardize processes, increase productivity, and provide consistent patient outreach. A new call management tool would also allow the organization to capture data to inform decision-making regarding resource allocation.

The organization's primary objectives in automating outbound referral management included:

- **Free up agents** to focus on high-value inbound calls and patient relationships
- **Streamline referral management** to improve the timeliness of patient outreach, increase in-network completion rates, and close care gaps
- **Leverage existing infrastructure** to avoid creating new and separate teams dedicated to outbound calls
- **Maintain patient-first communication** with timely scheduling

For the practice, it was about optimizing resources, improving timeliness, and ensuring that patients were not waiting longer to get care.

Case Study:

Automated Referral Scheduling
& Patient Access Automation



Organization Type:

Leading Academic
Multispecialty Physician Practice



Size:

2,900+ Providers | 230+
Specialties



Relationship:

WestCX Partner since 2013



Location:

New York, United States

REFERRAL TRANSFER RATE

3X

the industry average — 31.5% vs. 10%

31.5%
transfer rate

98.7%
success rate



Selecting WestCX: A Scalable Partner in Patient Access

The physician practice selected WestCX's automated patient engagement solution because it offered a proven, scalable solution to automate outbound referral scheduling and improve patient engagement for its spine center. WestCX is a trusted digital engagement platform with a 30-year track record in helping healthcare organizations connect with patients effectively. The organization had a relationship with WestCX and engaged the company to deploy its automated patient engagement solution, which offers the ability to automate outbound referral management calls, improving the patient experience and alleviating staff workload.

Several factors made WestCX the strategic choice:

Implementation with minimal operational disruption: With WestCX's team supporting the implementation of the solution at every step of the way, minimal lift was required from the physician practice's teams.

Alignment with the organization's mission to prioritize patient experience through automating routine outreach.

Familiarity with technology and team: Since WestCX already supported appointment reminders and billing campaigns for the practice, this created continuity and trust when considering additional technology.

Driving Measurable Results: Efficiency, Cost Savings, and Better Care

Since implementing WestCX's engagement platform for referral scheduling, the physician practice has realized measurable benefits across efficiency and patient experience. Their agents feel their impact is greater because they're focused on meaningful patient interactions. Patients also feel the benefits directly. Automated outreach ensures referrals are acted on as soon as they enter the queue, with calls beginning the very next day. This efficiency resulted in faster appointment scheduling, reduced delays in care, and fuller provider schedules that improve overall access. As of the most recent performance review, the practice's **referral transfer rate reached 31.5%—more than 3X the industry average of 10%—with a 98.7% referral success rate once a transfer is made.**

Beyond patient experience, the integration of the solution has delivered financial and operational benefits for the practice. With the automated tool, the organization has reduced costs, enhanced the timeliness of patient care, improved allocation of resources, and combatted referral leakage to close care gaps. Additionally, with all the data in one place, it's easier for the organization to oversee productivity and track performance. The team no longer has to pull from multiple systems to get a clear picture of productivity.

WestCX further strengthens internal operations by integrating directly into the physician practice's existing communication systems. Supervisors can now track productivity and appointment conversion from a single platform, eliminating the need for separate outbound referral teams. This seamless integration reduces staffing costs, simplifies workflows, and improves infrastructure efficiency.



The Future of Patient Access: Expanding Intelligent Automation

Following the successful implementation in one practice area, the organization plans to expand WestCX's referral scheduling automation to additional specialties. The organization also sees potential in leveraging WestCX's intelligent automation technologies, including intelligent virtual agents (IVAs) and next-best action capabilities, to further guide patient outreach and enhance patient experience.

The practice's focus has always been to provide patients with personalized, accessible care. WestCX helps the organization live that commitment every day, ensuring timely access and strengthening the patient experience.

