CASE STUDY

Artera ChatAssist AI Saves Sansum Clinic 159 Staff Hours in COVID-19 Vaccine Rollout

2021 marked Sansum Clinic's 100th Anniversary as the oldest and largest independent nonprofit healthcare organization on California's Central Coast.

- 22 locations
- 200 providers
- 30 specialties
- 700,000 patient visits per year

The Results

24 Hours
from concept to implementation on a new workflow that sent out 26,600 essages, saving 159 hours of staff time

35,000 Conversations
Within 6 months of deployment, 13 different use cases resulted in 35,000 fully automated patient conversations

New technology further improved Sansum Clinic's patient communications in key areas such as telehealth, portal enrollment, insurance verification, and COVID vaccinations.

Sansum Clinic—an Epic EHR customer—has been successfully using the Artera™ platform for a variety of use cases so they were selected to participate in a pilot of the new Artera ChatAssist AI feature. ChatAssist AI uses automated conversational sequences to independently navigate complex, multi-step patient communication. The new functionality creates custom bi-directional conversations that adapt to reflect the information provided by the patient using Natural Language Understanding.

ChatAssist AI vaccine workflow implemented in 24 hours

The initial plan was to start by piloting ChatAssist AI with certain departments for a small set of use cases. However, once administrators realized that they could use the upgrade for all of their patient communications, Sansum quickly rolled out ChatAssist AI across almost all of their departments.

ChatAssist AI has been especially helpful to Sansum in navigating the COVID vaccine process. One of the challenges Sansum was facing as a vaccination center was an inconsistent supply of vaccines. They often found out last-minute that they were getting a shipment so they did not have much time to contact patients to schedule appointments.

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Prior to ChatAssist AI multistep workflows, Sansum staff had to manually call people, starting with their older patient population, only to discover many had already been vaccinated elsewhere. Only one in every six phone calls would result in a patient needing a vaccination. Sansum knew there had to be a more efficient way to reach thousands of people without having to make numerous phone calls each time they received the vaccine on short notice.

"We just knew that there had to be a better way and we had confidence that Artera could help us solve this," said Lindsay Cortina, Director of Organizational Initiatives. She contacted her support team at Artera with an idea of what she wanted to accomplish.

Within 24 hours of contacting Artera with this problem, Sansum was able to deploy its new text message and phone call campaigns. In a ten-day period, this ChatAssist AI workflow sent out 26,600 messages, saving the staff 159 hours of work. Cortina said, "Going from concept to implementation with the Artera team, specifically with this use case, I couldn't have asked for anything better."

> ***"It's been life-changing. Artera has definitely given us a competitive advantage to continue in this industry."***
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> **Jessica Acevedo**
> Call Center Patient Access Manager

> ***"Supporting our call volumes has been just an ongoing challenge for several years. Artera has been our Swiss army knife of a solution for some of the challenges we've faced."***
>
> **Karen Handy**
> Vice President of Operations

Reducing telehealth and insurance workloads

ChatAssist AI had a big impact on streamlining the workflow for Sansum's telehealth appointments. Previously, Sansum staff would manually call patients before their telehealth appointment to ensure patients had the technical capabilities for the visit. While important in creating a positive telehealth experience for patients, these calls were repetitive and reduced staff availability for other tasks. Using ChatAssist AI, Sansum now automates this outreach to patients via text. In addition to saving staff time, addressing potential technical issues before the appointment ensured the provider can focus their time on patient care during the visit.

Sansum also built a custom conversation to address one of Sansum's other big pain points—insurance verifications. Using the flexibility offered by ChatAssist

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AI, Sansum built a conversational flow to automate the verification process. To help staff prioritize their work, ChatAssist AI also handles the identification of which patients can be scheduled immediately and which need additional authorization.

Artera and ChatAssist AI is "life-changing" for call center

One of the ever-present challenges of call centers is scheduling staff for changing workloads. Using a pre-built ChatAssist AI conversation for their MyChart patient portal enrollment saved the Sansum staff hundreds of work hours by enabling automated patient texts containing their activation code.

"Supporting our call volumes has been an ongoing challenge for several years. Artera has been our Swiss army knife of a solution for some of the challenges we've faced," said Karen Handy, Vice President of Operations. "It's been life-changing," added Jessica Acevedo, the Call Center Patient Access Manager, "Artera™ has definitely given us a competitive advantage to continue in this industry."

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