



CASE STUDY

Increasing Referral and Appointment Conversion with Proactive Patient Outreach



Case Study



A large academic health system in the Northeast deployed SpinSci Patient Notify to automate outbound outreach for referrals, appointment requests, and billing, replacing manual agent-driven workflows with intelligent, EHR-connected campaigns that reach patients on their terms.

ABOUT THE ORGANIZATION

This organization is a large academic health system serving patients across inpatient, outpatient, and emergency settings. With a high volume of inbound and outbound activity spanning referrals, appointment scheduling, and revenue cycle, the health system set out to modernize its contact center by automating patient outreach workflows and bringing consumer-grade responsiveness to every touchpoint.

THE CHALLENGE

Manual Outreach Slowing Access

The health system was managing two high-stakes workflows manually: appointment requests from patients who had self-referred through digital channels, and specialist referrals from providers. Agents were working through static lists, making calls without visibility into whether patients were ready to engage.

Unscheduled referrals sat in queues. Patients with outstanding balances weren't being reached efficiently. The contact center was absorbing the cost of a workflow that should have been working for them.

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“We were spending too much agent time trying to reach patients who weren't ready to engage. Patient Notify changed the equation. Patients tell us when they're ready, and our agents are there to answer. The manual effort is gone, and our referral workflows actually move now.”



**Operations Leader,
Academic Health System**

THE SOLUTION

Powering Proactive Patient Outreach with Patient Notify

SpinSci Patient Notify was deployed within the organization's Cisco environment, integrating directly with Epic to power proactive, intelligent outreach across referral, appointment, and billing workflows.

- Referral and appointment request campaigns that start with SMS, allowing patients to signal readiness before being routed to agents in live preview mode or followed up via Cisco predictive dialing
- Billing reminder campaigns powered by Epic, with self-service payment options enabling patients to resolve balances without agent involvement
- Real-time Epic integration that queries worklist items before outreach, removes notifications once actions are completed, and writes back patient responses and opt-outs
- Intelligent dialing logic that scales outbound volume during low inbound periods and reduces it during peak hours to protect patient experience while maximizing efficiency
- A unified agent worklist that consolidates referrals, appointment requests, and billing into a single prioritized queue, improving visibility and preventing duplicate outreach

OUTCOMES

- **Higher referral and appointment conversion** by engaging patients through their preferred channels before agent calls, increasing connection and scheduling completion
- **Reduced agent effort** on cold outreach, with predictive and preview dialing connecting agents only to reachable, ready patients instead of manual lists.
- **Improved revenue cycle performance** through proactive billing outreach and self-service payment options that reduce collection friction
- **Fewer wasted outbound attempts**, with real-time Epic queries ensuring outreach only targets patients who still need to act
- **Greater operational visibility** through dashboards tracking outbound dialer activity, enabling teams to manage capacity, monitor outcomes, and refine campaign rules



REDUCTION

Reduced agent effort



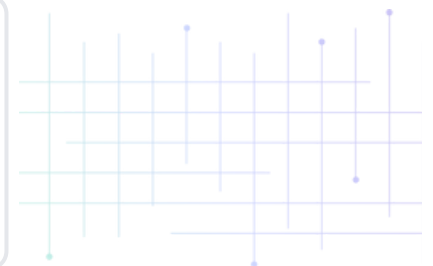
RESOLUTION

Higher referral and appointment conversion



SATISFACTION

Greater operational visibility





Get started now

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