An Inside Look

The Illusive Fundamentals of Operating a Provider Business

Sanitas Medical Center | lucerna Health Forward

VBCExhibitHall.com

Educational Webinar Series

Presenters

Lina Agamez

National Sr. Director of Operations,
Learning & Development

Sanitas

Craig Thomas

Co-Founder & CEO

lucerna

John Wagner

VP VBC Growth

lucerna

Company Introductions

Sanitas: Leader in patient-centered care and health ecosystems

Lucerna: Powering and connecting health ecosystems for better outcomes and better business

POPULATION HEALTH | PHSO

NEEDS & COSTS

+

ADVANCED/ ACUTE CARE

SPECIALTY CARE PROGRAMS

MENTAL HEALTH

CARE AT HOME

HOLISTIC PRIMARY CARE
Embedded Behavioral Health

24/7 VIRTUAL CARE

COMMUNITY-BASED SERVICES

−

Consumer Acquisition

Consumer Navigation

Provider Performance

Leap Platform

Patient Engagement

Provider Operations

Provider Engagement

Today's Discussion

INSIGHT AND ENABLEMENT

FUNDAMENTALS OF OPERATING A PROVIDER BUSINESS

PROVIDER PRACTICE PROCESSES

- Data as an Asset
- Actionable Insight
- Patient Engagement
- Operational & Digital Enablement

- Patient Flow Management
- Experience Improvement
- Resource Management
- Performance Management

Sanitas | lucerna

HOUSTON
WE HAVE A PROBLEM

35 %
Appointments slots not used.
$1.5B/yr missed appts cost

↓ **$250K**
Average loss per PCP per year by Health System

61 %
Patients want more continuous engagement.

72 %
Patients rely on online reviews to pick providers

48 %
Physicians report burnout.
30% time on admin tasks.

20
Payer contracts per practice.
35-82 for Hospitals, highlining significant complexity.

Sanitas | lucerna

Operational success lies in mastering the fundamentals

> " I believe in the basics. They may seem trivial, even laughable, but they are fundamental to success in basketball, business, and life. "
>
> *John Wooden*

What do you know on a timely basis?

- How many active patients do you have ?

- Who are your priority patients?

- Are your patients matched with the right providers?

- Are your patients satisfied across your teams and processes?

- What's your provider capacity and productivity?

- Are you optimizing payer contract performance?

What is the biggest challenge for provider business operators?

1. Leveraging data and technology as an asset?

2. Supporting clinical processes?

3. Managing and retaining scarce resources effectively?

4. Meeting patient and provider expectations?

Poll

Insight & Enablement

INSIGHT AND ENABLEMENT

FUNDAMENTALS OF OPERATING A PROVIDER BUSINESS

PROVIDER PRACTICE PROCESSES

- Data as an Asset
- Actionable Insight
- Patient Engagement
- Operational & Digital Enablement

- Patient Flow Management
- Experience Improvement
- Resource Management
- Performance Management

Sanitas | lucerna

3 Steps to Leverage Data as an Asset
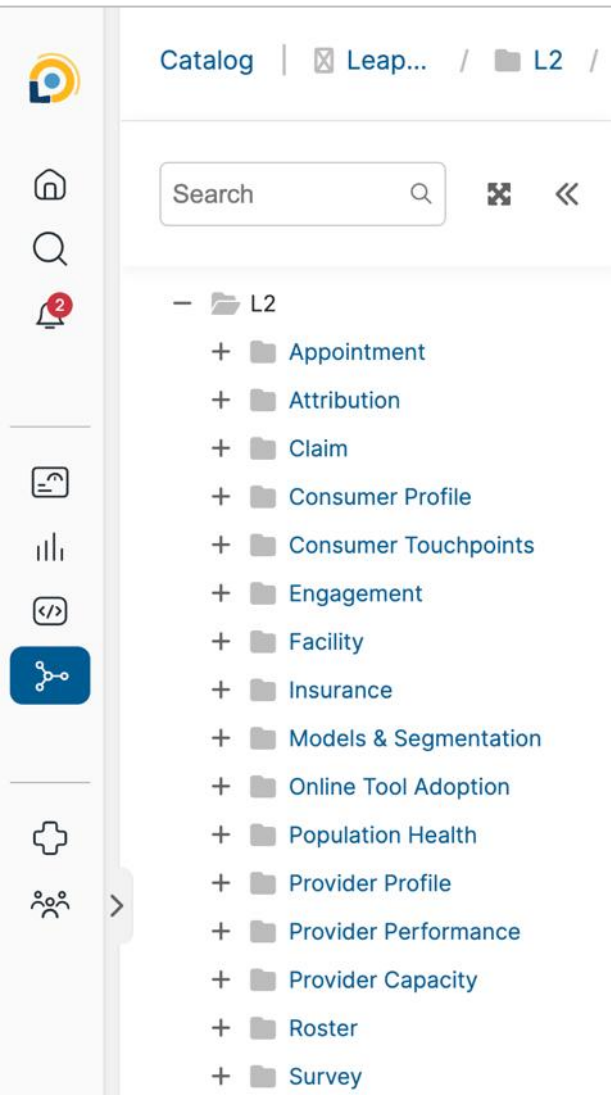
Integrate, Transform, & Unify Data

- Ecosystem Integration
- Unified Data Model
- Enrichment & Validation

Create Insight for Activation

- Consumer 360
- Provider 360
- Patient-Provider Matching
- Impact Analytics

Connect Key Operational Processes

- Patient Experience
- Provider Engagement
- Performance Management
- Operational Optimization

Catalog | Leap... / L2 /

Search

- L2
  - Appointment
  - Attribution
  - Claim
  - Consumer Profile
  - Consumer Touchpoints
  - Engagement
  - Facility
  - Insurance
  - Models & Segmentation
  - Online Tool Adoption
  - Population Health
  - Provider Profile
  - Provider Performance
  - Provider Capacity
  - Roster
  - Survey

Sanitas | lucerna

Creating Timely Actionable Insight

Consumer Registry

Add Registry

All Registries

All Registries

| | All Registries \| My Registries |

🔍 Search   Status \| Active ✕   Add filter +
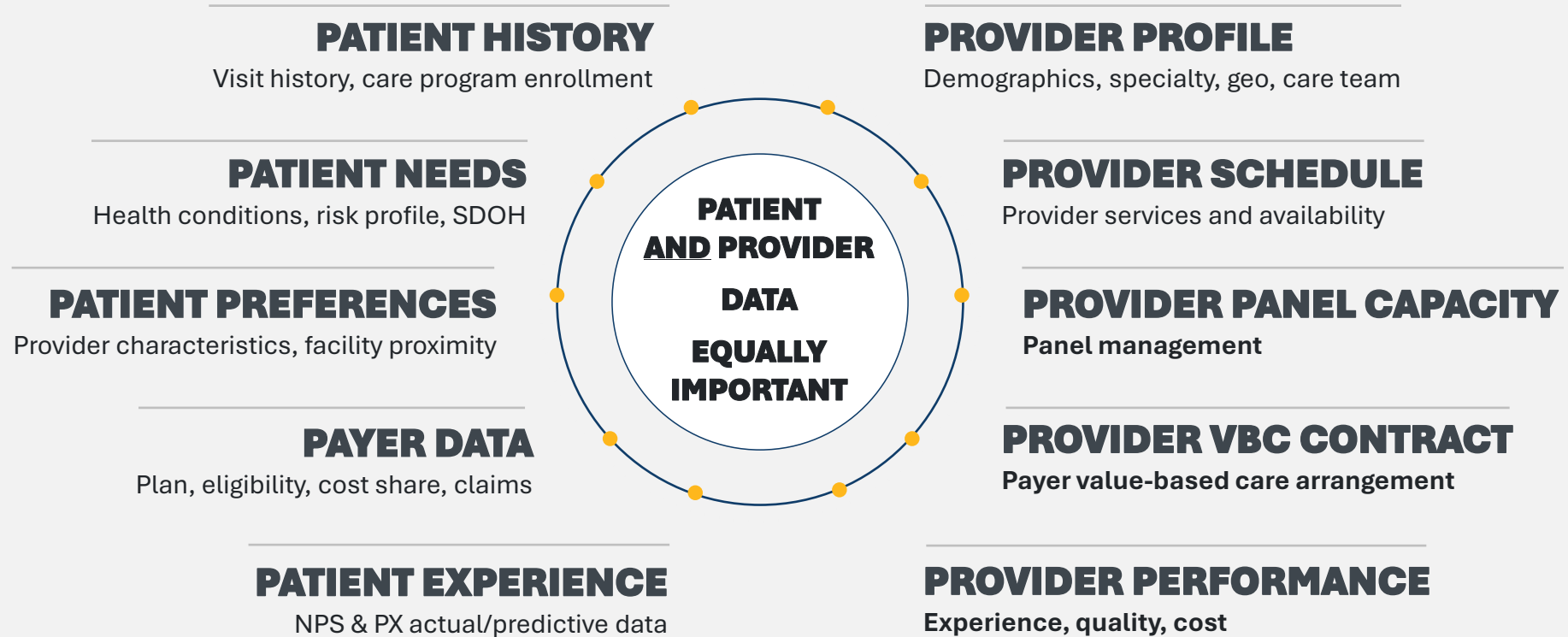
NAME	STATUS	LABELS
Patient with Next PCP Visit – Not Matching Assigned Care Team	Published	Care Continuity
Roster Member with 2+ ER Visits – No PCP Visit This Year	Published	Priority Cohort Engagement
Payer Roster Women 25-65 – No Cervical Cancer Screening Claim	Published	Care Gap
Diabetic Roster Member – No A1c Test in Past 6 Months	Published	Care Gap
High-Risk Member with Recent IP – No PCP Visit in Next 14 Days	Published	Priority Cohort Engagement
Patient with Scheduled Visit – No Patient Portal App Registration	Published	Engagement

- Bridge the gap between data and operations for impact
  - Don't fly blind
- Connect your insight to drive business and clinical processes
  - Insight alone doesn't impact results
- No code practical tools for business analysts
  - Democratize data across the practice
- Consumer Registry example: patient cohorts for care management and personalized outreach

Sanitas | lucerna

Patient Engagement

- Leverage data and insight for targeted and personalized outreach

- Engage priority patients

- Match patients with the right provider for outcomes

- Integrate with operations for efficiency and access to care

Operational/Digital Enablement

- Leverage data to power websites and patient apps

- Personalize patient communication from their provider

- Support front desk service

- Drive on-line and efficient call center appointment booking

Today's Discussion

FUNDAMENTALS OF OPERATING A PROVIDER BUSINESS

INSIGHT AND ENABLEMENT

- Data as an Asset
- Actionable Insight
- Patient Engagement
- Operational & Digital Enablement

PROVIDER PRACTICE PROCESSES

- Patient Flow Management
- Experience Improvement
- Resource Management
- Performance Management

Sanitas | lucerna

Complex Operational Environment

Facilities & Providers		Business/ Services Lines	Patient Population	
2	States	Primary & Urgent Care		All Payer Segments
9	Regions	Virtual Medical Center	**600K**	Patients
78	Facilities	Specialty Care, Metal Health, Palliative Care	**90%**	VBC Program
327	Providers	PHSO	**1.2M**	Appointments

Sanitas | lucerna

Effective technology is foundational. Connecting to the people and processes behind it creates value.

Insight

+

Activation

=

RESULTS

Sanitas | lucerna

Patient Journey Management

Insight

PATIENT/ PROVIDER MATCHING

APPOINTMENT EFFECTIVENESS
- Wait times
- Availability
- No Show, Cancelations, Reschedule

RESOURCE PRODUCTIVITY

Activation

☑ **PATIENT ENGAGEMENT**

☑ **OPERATIONAL READINESS**

☑ **PROCESS IMPROVEMENT**

☑ **RESOURCE PLANNING**

Measuring Impact

- Access to care
- Care continuity
- Operational Excellence

Consumer 360 — Jane Doe

Consumer 360 | Jane Doe ✕

Jane Doe [Chronic]
MRN: 12345341

Consumer Info | Care Team | Consumer Details

Assigned Primary Care Provider: Adrian Artiles
Assigned By: Denise Fernandez - 02/07/25

Practice Type	Speciality	Facility	Panel	Last PCP Visit
Medical Director	Internal Medicine	Miramar	Adult	07/11/2024

Next PCP Visit	Last PCP Visit Provider	Next PCP Visit Provider	Availability Slots by Week			
03/07/2025	Liz Laguardia	Adrian Artiles	27	35	45	70

Assigned Primary Care Team

NAME	PRACTICE TYPE	AVAILABLE SLOTS BY WEEK			
Yofre Alarcon, APRN	Primary Care	18	10	30	30
Liz Laguardia, APRN	Virtual Care	45	80	95	100
Rocio Suao, APRN	Primary Care	10	12	27	11

Secondary Care Team

Assignment History

Sanitas | lucerna

Experience Improvement

Insight

PATIENT & PROVIDER SURVEYS

PX ACTIONABLE ANALYTICS:
- Clinical
- Operational
- By Process, Care Team, location

SERVICE RECOVERY REGISTRY

Activation

☑ **PROCESS IMPROVEMENT**

☑ **TECNOLOGY ADOPTION**

☑ **REPUTATION MANAGEMENT**

☑ **PATIENT/ PROVIDER OUTREACH**

Measuring Impact

- Market Reputation
- Patient Retention
- Care Engagement
- Recruitment/Retention

Consumer 360   Jane Doe ✕   Pinned Profiles

Jane Doe [Chronic]
MRN: 12345341
Consumer Info   Care Team   Consumer Details

Primary Care Appointments

PCP Appointment This Year   PCP Appointment Last 12 Months
No   Yes

Next Appointment Analytics

Date   Provider   Appt With Assigned PCP   Appt With Care Team   Potential No Show   Potential Detractor
03/07/2025   Liz Laguardia   No   Yes   92%   88%

Catergory   Facility
Primary Care   Miramar

Last Appointment Analytics

Date   Provider   Appt With Assigned PCP   Appt With Care Team   Catergory   Facility
07/11/2024   Adrian Artiles   Yes   No   Primary Care   Miramar

Identifiers

LUCID   Master Member ID   Master Patient ID
SNTS20290617716866087979 421910   421910
402

Assignment Audit

Consumer Data History

Resource Management

Insight

PROVIDER PANEL OPTIMIZATION

CAPACITY ANALYTICS

PRODUCTIVITY ANALYTICS

Activation

☑ **FOOTPRINT EXPANSION**

☑ **PROVIDER HIRING PLAN**

☑ **PANEL LOAD BALANCING**

☑ **PROCESS IMPROVEMENT**

Measuring Impact

- Productivity
- Cost efficiency

Performance Management

Insight

PAYER CONTRACT PERFORMANCE

PROVIDER/ CARE TEAM PERFORMANCE

ADMINISTRATIVE PERFORMANCE

Activation

☑ **PAYER CONTRACT MANAGEMENT**

☑ **COACHING/ DEVELOPMENT & COMPENSATION**

☑ **CLINICAL PROCESS IMPROVEMENT**

☑ **OPERATIONAL PROCESS IMPROVEMENT**

Measuring Impact

- Growth
- Profitability
- Quality of care
- Value-based care

Performance Breakdown for ████████████████████ **Primary Care**
KPIs Details - 2024

Category	KPI	Goal Name	Target	Actual	% Target	Weight	Score
Clinical Performance	E-Learning Courses	E-Learning Courses Completed	100%	100.0%	100.0	10%	10.0
Operations	Closing Notes	Notes Closed %	95%	99.4%	100.0	5%	5.0
	Productivity	Avg Daily Chk / Daily Target	90%	71.1%	79.0	5%	3.9
Patient Experience	Dr. Evaluation Question	Dr. Evaluation	90%	91.9%	100.0	5%	5.0
	NPS	NPS	75%	92.7%	100.0	5%	5.0
Pop Health / Quality	Chronic Patients	Chronic Patients Seen	82%	92.9%	100.0	10%	10.0
	HCC Audit	HCC Audit	80%	94.6%	100.0	10%	10.0
	HEDIS	Breast Cancer Screening	85%	88.4%	100.0	4%	4.0
		Cervical Cancer Screening	82%	78.8%	96.1	4%	3.8
		Colorectal Cancer Screening	75%	62.9%	83.9	4%	3.4
		Comprehensive Diabetes Care: …	65%	72.1%	100.0	4%	4.0
		Controlling High Blood Pressure	83%	91.7%	100.0	4%	4.0
Total						70%	68.1

Sanitas | lucerna

Stop by our VBCExhibitHall.com Virtual Booth

lucerna
Health Forward

REQUEST INFO

in

SMART ENGAGEMENT AS A SERVICE
START TOUR

Transform data into meaningful action. Acquire, engage, and retain patients or members with our Leap platform and experienced team solution.

RESOURCES

Consumer Acquisition
Consumer Navigation
Provider Performance
Leap Platform
START TOUR
Ecosystem Integration
Provider Engagement
Patient Engagement

John Wagner
VP of VBC Growth
john.wagner@lucernahealth.com
(904) 536-4044

RESULTS THAT MATTER

Growth
Revenue
VBC performance
Operational efficiency

CLICK TO VISIT

Thank You

Connect with us today to move healthcare forward!

Sanitas

lucerna

Alberto Ospina
VP, Corporate Development
703-282-0569
aospina01@mysanitas.com

John Wagner, MHA
VP, VBC Growth
904-536-4044
John.Wagner@lucernahealth.com