

Cultivating a Modern Patient Communication Solution Within PCC EHR



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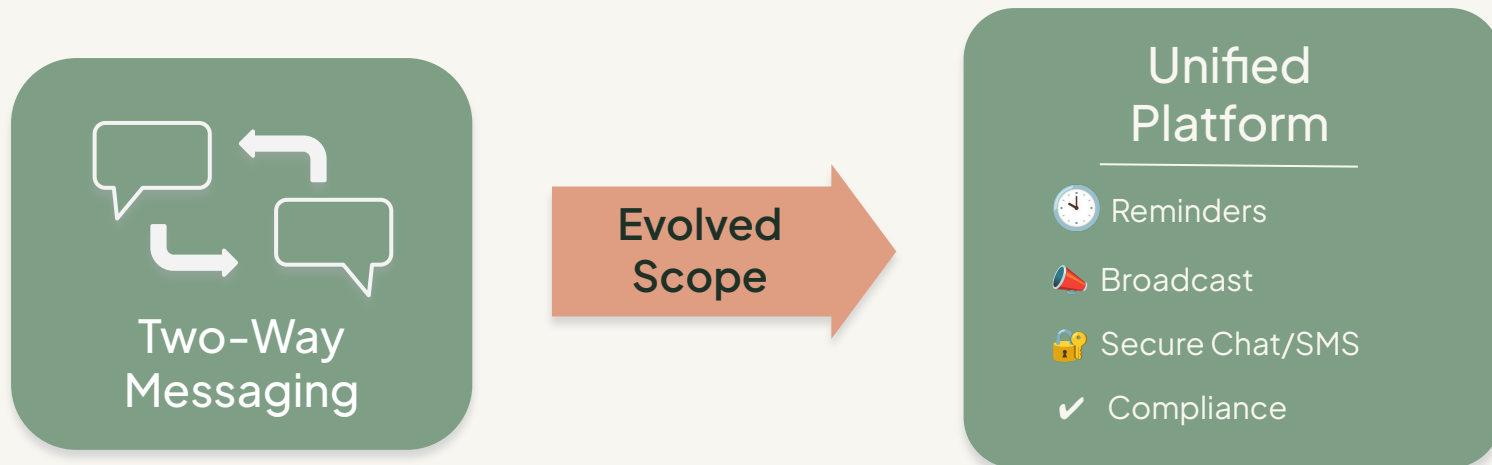
Lauren Smith

Planting the Seed

The Big Idea: From a Feature to a Platform

We began with a goal to add two-way messaging.

What we discovered is that to make two-way messaging work for our clients, it needed to be part of a unified communication platform.



Growing Our Understanding

Client Voices

The Patient Communication Project Team interviewed clients, Client Advocates, and key internal stakeholders (CAs, PEI, and others) to learn about the challenges and opportunities with patient communication.

What Our Clients Shared

“

A whole new generation of patients don't answer their phone, and some of them don't use the portal like they should. They respond when we text, but right now they can't reply.

”

What Our Clients Shared

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Eighty percent of our communication is related to appointments. Reminders, rescheduling, quick updates; it's all through text.

//

What Our Clients Shared

//

*We don't want to juggle multiple platforms.
We want one tool where reminders,
broadcasts, and messages all flow together
and connect to the chart.*

//

Initial Research Findings

Clients helped us define the problems and solutions.

What We Learned

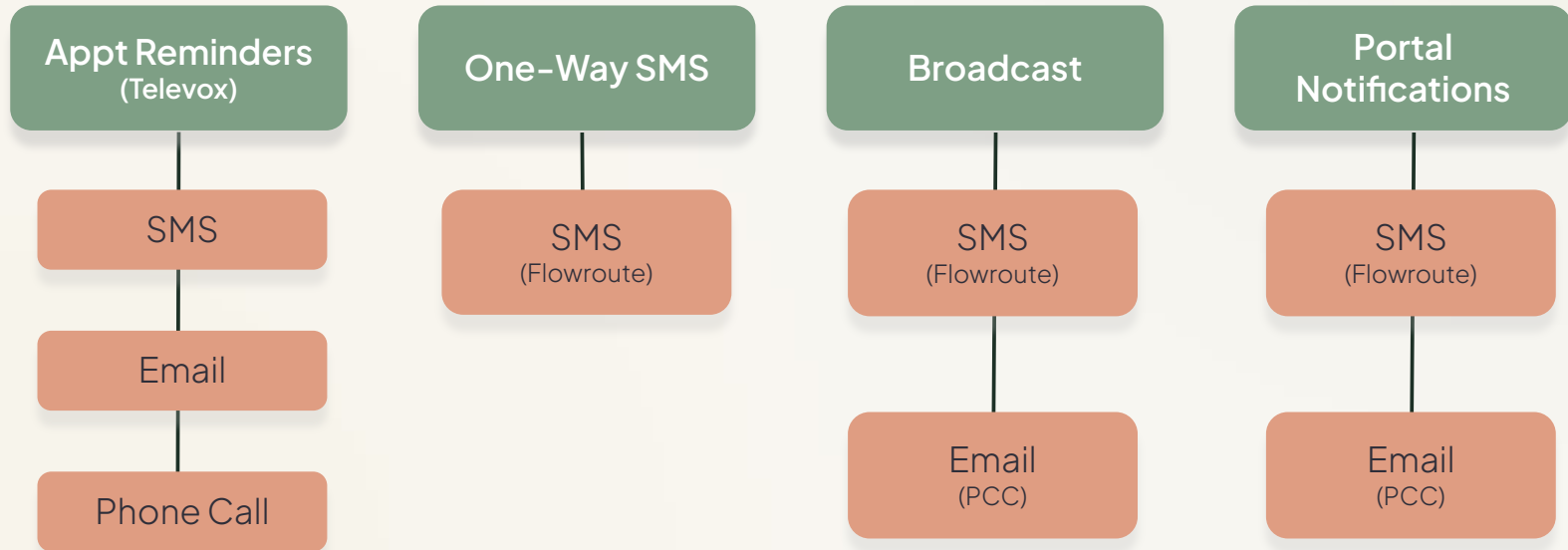
- Families prefer texting and quick replies
- Most texting is about appointments and rescheduling
- Clients want a unified communication experience
- Many clients aren't using Notify for appointment reminders
- Multiple platforms make it challenging to train/support

What It Means

- One-way messaging isn't enough
- Reminders need two-way messaging capability
- Fragmented tools lead to confusion & inefficiency
- One of our fundamental features isn't universal
- When workflows aren't connected, adoption suffers

The Problem Today: Fragmentation

PCC provides useful, but incomplete tools. The experience of using Notify, Single Text, and Broadcast feels disconnected, because it is.

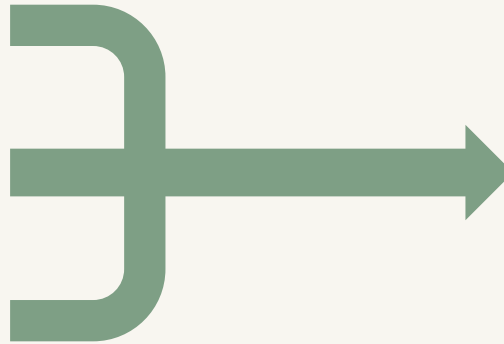


The Solution: Consolidation

If we're updating our communication tools, we should do it once, and do it right. Unifying messaging, reminders, and broadcasts now saves years of rework later.



Additional Two-Way
Messaging Vendor



Expanded Scope & Feature Requirements

Based on client feedback, feedback from internal stakeholders, and the knowledge we would need to update Notify eventually, we expanded the scope of this project.

Core Needs

- SMS and email messaging; voice/phone messaging is helpful
- Appointment reminders with confirm/cancel
- Broadcast messaging with replies
- Secure, real-time, bi-directional chat
- EHR integration for continuity of records

Additional Needs

- Family-based contact mapping (multiple children to one contact & vice versa)
- Support for multiple language translation
- Customization of messages
- Communication history
- Reminder configuration by provider, location, and time window

Build vs. Buy Comparison

BUILD

- Two separate products to build
- Long timelines (years)
- Heavy development effort
- Higher ongoing maintenance & support burden
- Still requires 3rd-party SMS vendor

BUY

- Much faster time to market
- Lower development effort
- Vendor handles industry complexity & compliance
- More powerful feature set
- Scalable & aligned with industry

BOTTOM LINE:

Buying gets us there faster, and cost may be equal or less.

Why Luma Stood Out

01

Comprehensive Functionality

Two-way messaging, reminders w/ confirm & cancel, broadcast messaging, secure chat, family mapping, reporting

02

Pediatric Experience

Supports pediatric practices and pediatric family structures

03

EHR-First Approach

PCC remains source of truth; communication flows back to chart

04

Technical Maturity

Robust APIs, major EHR integrations, scalability

05

Partnership Quality

Strong collaboration, best-practice guidance

About Luma

Luma's Mission

To get healthcare out of the way of health care

Our founding goal was to connect patients and their providers to keep people healthier. This vision continues to hold true – we believe that needing healthcare is hard, but getting care shouldn't be.



10+ Years of Experience



50M+

Unique Patients



1200+

Customers



500K+

Daily Patient Interactions



200,000+

Health Professionals



SOC 2

Type II Certified



ISO

27001:2022 Certified



HITRUST

Certified



Recognized

Standout Platform

Results of Friction in the Care Journey

 4 reviews
★★★★★ 7 months ago

We love our primary care doctors and their office staff at Gardens Family Practice, we'd been their patients for 8 years. Then they became part of our communication experience with the new organization has been appalling. Their phone line is impossible to get through - last week I waited for FORTY MINUTES for someone to pick up. I was only caller #4 for pete sake. Finally I just gave up. I needed to cancel appointments but their Breeze app messaging was down Sunday AND it turns out you can't cancel appointments through Breeze anyway, only confirm. There's no way to reply to their reminder text messages. What a terrible communication "system". I would give no stars but you can't do that, so had to give 1.

 1 review
★★★★★ 7 months ago

I love my Physician, but hard to find a help to communicate over the phone, or leave a message for the physician. I called for medication refill on this Monday the 07/25th, 2022, the Lady who answered the phone stated they sent prescription to pharmacy, but pharmacy did not receive. I called again, then they said they will call me back, but no call received. My husband is out his diabetic medication for since then. Today 7/29/22 for more than half an hour I was on the phone and call got hanged up, I called again in the front desk, explained to her my issues, then I was put on hold, then the final answer was this medication was not on my husband's profile. It is not our problem, we were told them what all medication we both take during the physician visit time. If they left out or forgot to write, or didn't transfer our medication list from our previous Physician, why the patients get punished without medication? Anyway we will look for another physician with good communication system. Terrible communication system.

 1 review
★★★★★ 3 months ago

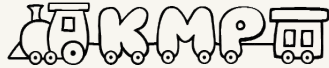
is the worst office now, before was so easy to communicate with the stuff and the doctors. I had the appointment scheduled 4 months ago, and I went today for my appointment. And they told me I'm not in schedule. What a joke! Supposedly they called, but I didn't receive any phone call or had a voicemail.

I'm just disappointed because my primary doctor is very good, but the new rules in that office is awful. I will not longer need the services from this office. Shame of you ClareMedica for letting me go home today, when I really need it to see my provider. I have serious health issues and one week ago I was in ER. How you take care your patients when they need you?

Luma = Positive Impact to Pediatrics!



South Lake Pediatrics



- 50% reduction in no-shows
- 10+ staff hours saved per day
- 73% Spanish reminder response
- Hundreds of daily calls eliminated
- 92.82 Net Promoter Score



01 — Appointment Reminders

Reliable, compliant, and secure reminders

- Automated, EHR-synced reminders that update in real time as caregivers respond
- AI-powered replies understand natural language and are delivered in 30+ languages

02 — Communication Hub

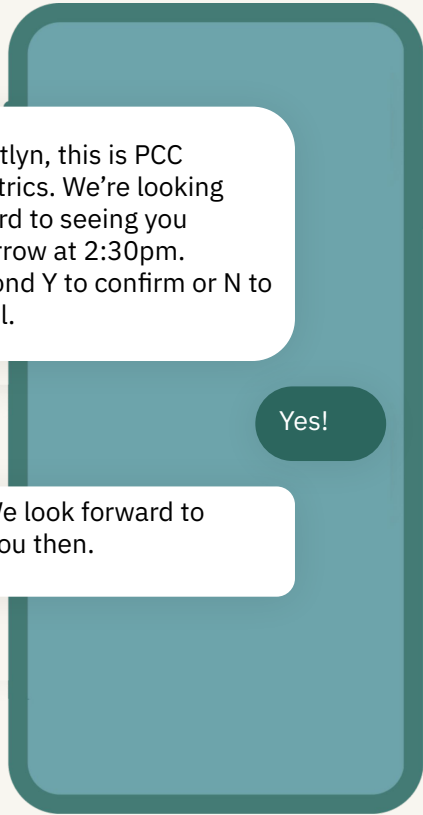
Secure conversations, no app or login required

- HIPAA-compliant two-way texting gives caregivers direct answers without phone tag
- A single view ties every conversation to the patient record, with nothing lost between shifts

03 — Broadcast

Reach your whole patient population in one send

- Instantly reach a group or your entire patient base for closures, delays, or call-outs
- Also powers proactive outreach like vaccine reminders and health campaigns



Hi Kaitlyn, this is PCC Pediatrics. We're looking forward to seeing you tomorrow at 2:30pm. Respond Y to confirm or N to cancel.

Yes!

Great! We look forward to seeing you then.

What's Next?

The Product MVP

Appointment Reminders

- Confirm/cancel on reminders
- Delivery configuration
- Message templates
- Reporting (reminders sent/received)

Two-Way Messaging

- Access to Luma messaging hub
- Full bi-directional message threads
- Initiate conversations from reminders

Platform Foundation

- Luma API development
- SSO & role management
- Access to Luma reports
- Access to Luma configuration

Future Feature Planning

System Notifications

Portal account creation, password reset, new message, etc. alerts

Other

Message history in chart, Luma chat as a pop-up frame in EHR

Broadcast & Recall Messaging

Mass messaging integration w/Luma via Report Library

Billing Reminders

Billing notifications for outstanding balances

Questions
