medbridge

Patient-reported outcomes: An operational playbook

A practical guide to launching, scaling, and sustaining patient-reported outcomes

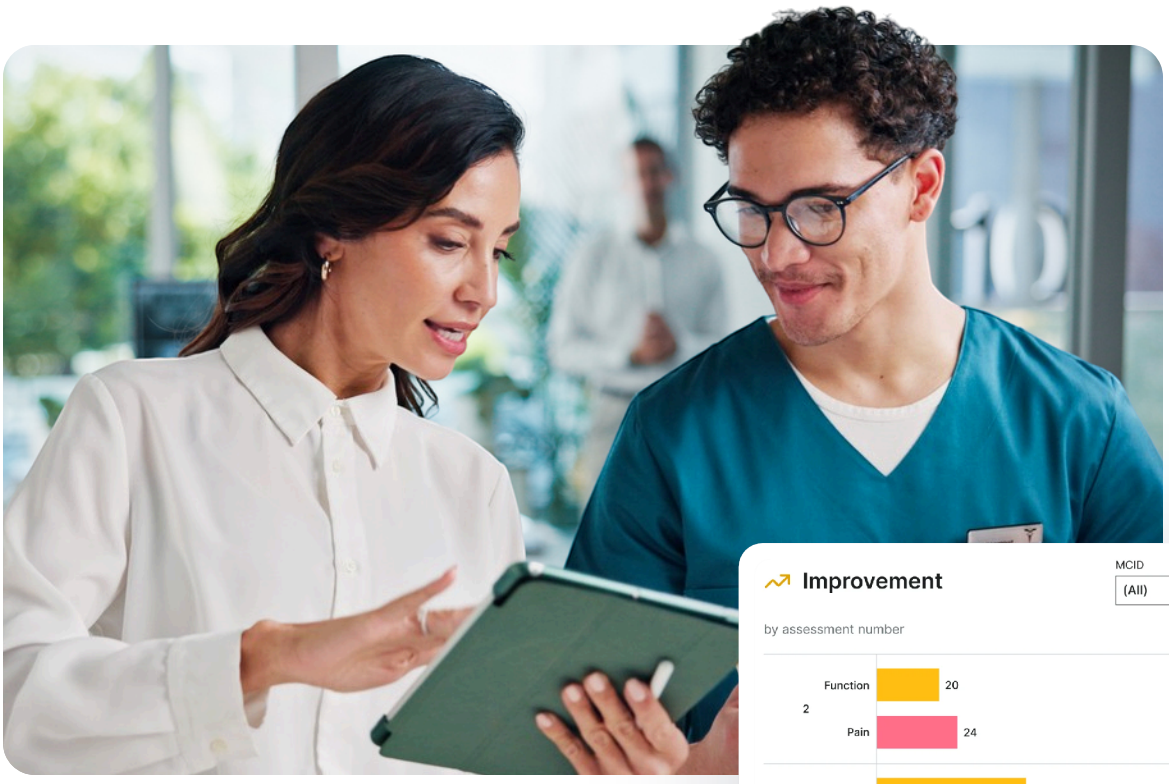


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Overview



Patient-reported outcomes (PROs) give clinicians a clearer view of how patients are progressing, while also giving organizations a consistent way to understand clinical performance across teams and clinics.

But for PROs to become part of standard care, organizations need more than just an outcomes platform. They need the right leadership, clearly defined workflows, consistent clinician training, and an ongoing rhythm for monitoring and acting on the data.

This playbook translates the ACES framework—**Align**, **Clarify**, **Enable**, and **Sustain**—into the day-to-day actions needed to operationalize PROs.

> **The goal is simple:** help clinical leaders move outcomes from a leadership decision to a repeatable standard of care.

The ACES framework

A successful PRO program starts with strategy but succeeds through execution.

ALIGN

Establish the ‘why’

Define what you want outcomes to accomplish for patients, clinicians, and the organization, and establish the leadership support needed to get started.

CLARIFY

Define the workflow

Build a clear workflow for assigning, communicating, collecting, and reviewing PROs.

ENABLE

Equip your team

Give clinicians and supporting staff the training, tools, and standards they need to make outcomes collection routine.

SUSTAIN

Measure, report, and reinforce

Monitor performance, identify opportunities, reinforce successful workflows, and use outcomes data to drive clinical improvement.

Align



Establish the ‘why’

Simply put, we must establish ‘why’ we are collecting outcomes by defining what outcomes should accomplish for patients, clinicians, and the organization. That’s why the most effective PRO programs begin with a different question:

How can we better understand whether our patients are improving?

When that question drives the program, organizational value becomes a result of better clinical visibility, not the primary reason for collecting outcomes. That’s because outcomes are first and foremost a tool for **patient care and clinical quality**, and everything else follows from that foundation.

Once that has been established, narrow down what outcomes should accomplish for your patients, clinicians, and the organization as a whole. Your PROs program can help you:

Prove the value of your care to demonstrate clinical effectiveness, while driving referrals and payment.

See performance variation by comparing clinics and clinicians to target coaching where it moves the needle.

Protect reimbursement and compliance by reporting results from an up-to-date system of record.

Direct training resources with confidence by enabling mentorship where performance shows it is needed.

ALIGN

How to get ready before you launch

Once you've established what you want your outcomes program to accomplish, you might be tempted to launch fast and get that valuable outcomes data flowing as soon as possible.

But if you skip the foundation, you risk high rates of clinician resistance and early abandonment.

Before you ever think about going live at a clinic, put these four elements in place:

1 **Executive sponsor**

Assign a leader, such as a VP or Director of Rehabilitation Services, Clinical Quality, or Clinical Education, to own the initiative and connect it to concrete organizational objectives.

2 **Clinical champions**

Identify respected clinicians who can model the workflow, answer peer questions, and help troubleshoot concerns during rollout. Clinical champions are especially important during the initial implementation period, when teams are learning how outcomes fit into everyday care.

3 **Standardized measure selection**

Determine which measures should be used for each treatment category at the organizational level. Measure selection should not become a per-patient decision, and clear organizational standards give clinicians a consistent framework and reduce unnecessary decision-making during the visit.

4 **Patient records and digital connection**

Patients need a record and an active digital connection before a PRO can reach them. Before launch, understand where your organization stands using our Care Analytics Dashboard so those foundational pieces don't become barriers to adoption.

ALIGN

Define success before you start

A successful PRO program needs clear operational targets, and three metrics provide the foundation for measuring progress:

Outcome assignment rate

The percentage of new evaluations with a PRO assigned. This tells you whether outcomes are becoming part of the routine evaluation workflow.

YEAR 1	MATURE PROGRAM
80% of evaluations	≥90%

Completion / capture rate

The percentage of patients with a baseline plus at least one follow-up. This is the minimum needed to analyze improvement.

YEAR 1	MATURE PROGRAM
60% with 2+ captures	≥75%

Clinical improvement rate

The percentage of patients who improve beyond the applicable minimally clinically important difference (MCID) threshold. This is the ultimate measure of program value.

YEAR 1	MATURE PROGRAM
Establish a baseline	Track against MCID

The second capture is the critical number

A baseline PRO without a follow-up produces no outcomes data, because the follow-up tells you what changed. Without that second capture, you don't have the outcomes data needed to understand improvement.

That makes follow-up completion one of the most important operational priorities in your PRO program.

Clarify



Define the workflow

Once your organization is ready, define exactly how PROs fit into care.

Medbridge supports both a front desk-led model and a clinician-led model, but front desk-led is recommended. In this model, the front desk or support staff creates the patient's episode, assigns the PRO bundle, names the clinician who will monitor it, and sends the patient their assessment by email, SMS, or QR code. Why choose this model? Because **sending before the visit saves time in the clinic!** This gives the patient time to complete PROs at home, so their outcomes are ready when they arrive for their appointment.

The front desk-led PRO workflow

1. **Create the episode**
   Create a PROs Only episode before the visit, which collects outcome measures without an existing course of care (exactly what the front desk flow is built for!)
2. **Share with patient**
   Invite by email, SMS, or QR code. The patient then receives the PRO digitally, which the platform will deliver automatically.
3. **Track patient engagement**
   A PRO due alert flags every patient with a PRO in a due or overdue state, so you can find who needs an invite before opening a single record.
4. **Confirm the assignment & hand off to clinician**
   Confirm the assignment landed and the right clinician is named. From here, monitoring belongs to the clinician that was designated.

The clinician-led PRO workflow

1. **Assign**
   The clinician assigns the PRO alongside the HEP at evaluation.
2. **Share**
   The patient then receives the PRO digitally, which the platform will deliver automatically.
3. **Communicate**
   Start by explaining to the patient what the PRO measures, then connect it to the patient's care to drive home the importance.
4. **Follow-up**
   The clinician confirms the follow-up PRO is complete at each visit. The platform sends automated reminders between visits, so the clinician prompts only when needed.

CLARIFY

How clinicians should introduce PROs

Patient completion is won at first assignment depending on how the clinician frames what the PRO is and why it matters. Proactive framing is the lever that puts success into motion.

Name what it measures:	"A short survey about how your condition is affecting your daily life and activities."
Connect it to their care:	"We'll use this information to help set goals that matter to you, and understand if there are adjustments we need to make to your plan."
Set the expectation:	"You'll receive a survey once every two weeks so we can track your progress together."

SAMPLE INTRODUCTION

“As part of your treatment plan, I'm going to send you a short survey about how your condition is affecting your daily activities. You'll complete this first one so we know where you're starting from, and you'll get another every two weeks so we can track how things change over time.”

CLARIFY

What clinicians should do at every visit

The clinician owns the full PRO loop. The collection step requires patient input, and the review step is the clinical value-add.

1. **Open the patient profile**
   Review the patient's HEP and outcomes data.
2. **Check assessment status**
   Determine whether the latest PRO has been completed.
3. **Prompt if outstanding**
   If needed, have the patient complete the assessment during the visit using a QR code or SMS/email link.
4. **Review and act on the data**
   Look at the patient's trajectory, determine whether progress is moving in the right direction, and consider whether treatment needs to be adjusted.

CLARIFY

How clinicians should discuss PROs at follow-up visits

Once a patient has completed an assessment, the follow-up visit is where the PRO earns its keep. Reviewing it out loud shows the patient that their data matters and turns the score into a shared decision.

Check for a survey:	Look at the patient record to see whether the latest survey is done. If it's outstanding, invite the patient to complete via email/SMS or have them scan the QR code in the clinic that navigates directly to the PROs for immediate completion.
Review the trend:	Is the score moving in the right direction, staying the same, or getting worse? The direction matters more than any single number.
Respond to what you see:	If progress is stalling or not improving, adjust exercises, discuss barriers, or explore other factors. Review it with the patient to inform the next steps.

SAMPLE FOLLOW-UP

"Let's look at your survey scores before we get started. Your score has stayed mostly the same over the last few weeks, so let's talk about what might be getting in the way and adjust where we can."

CLARIFY

How clinicians should discuss PROs at discharge

Discharge is another opportunity to use outcomes data as part of the patient conversation. Reflecting on how far the patient has come gives them a concrete sense of their progress and sets expectations for maintaining it.



Celebrate progress:

Help the patient see how far they've come and what they can do now that was difficult before.



Make it their win:

Connect improvement to the patient's effort and progress.



Set the path forward:

Help the patient understand how to maintain that progress and when to reach back out if things begin to decline.

SAMPLE DISCHARGE

"Look at how far you've come since we started. This is the result of the work you put in, and it's yours to keep building on. If things start to slip down the road, that's your cue to reach back out so we can help."

Enable



A workflow is only effective when everyone understands it. Successful PRO programs train across four areas, with each mapped to certain roles:

Workflow

All clinicians + clinic leaders

How the PRO lifecycle works, from assignment at evaluation through follow-up at every visit.

Communication

All clinicians

How to introduce PROs proactively to patients with clinical framing and "we" language.

Assignment

Clinicians + front desk

Which measures to select for each treatment category, when to assign, and how to set patient expectations.

Monitoring

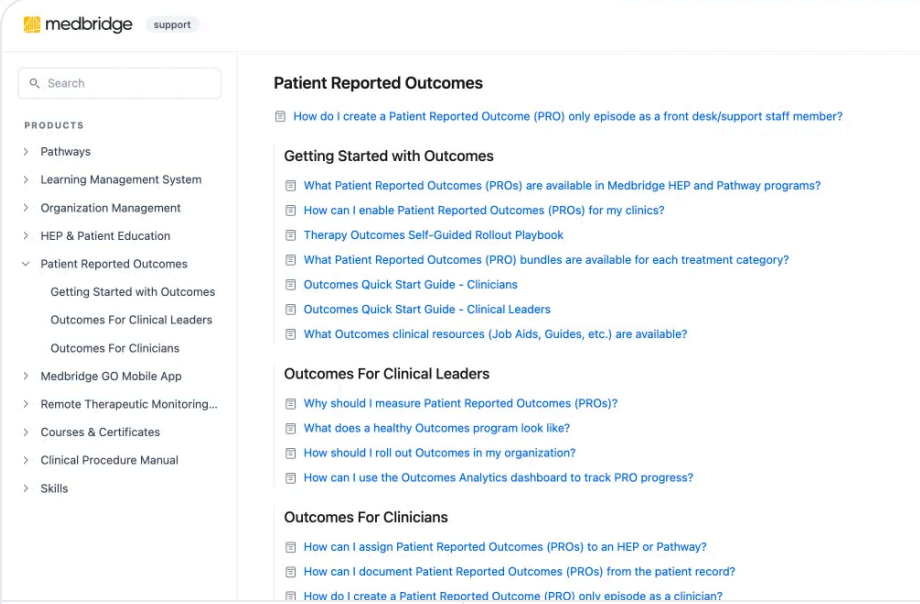
Clinical leaders + department heads

Reading the Outcomes dashboard, interpreting trends, and acting on signals.

Make training easy to find

Your team shouldn't have to search for answers when a workflow question comes up. The **Outcomes Help Center** provides a central location for PRO training, support articles, product guidance, job aids, and best practices.

ENABLE



SCAN OR VISIT

Medbridge Support → Patient Reported Outcomes

Bookmark this section

Always current
Updated with every release

All in one place
Articles, job aids, best practices

Searchable & shareable
Send a link or embed in LMS

Make these resources part of your ongoing operational rhythm.

- **During onboarding:** Introduce the workflow and expectations.
- **During rollout:** Give clinicians just-in-time resources as they begin using PROs.
- **During reinforcement:** Use support materials to address recurring questions and workflow gaps.
- **As the product evolves:** Keep teams connected to current guidance.

Sustain



Execute, report, and reinforce

PRO implementation doesn't have to happen across every clinic at once. In fact, it's recommended to start with a focused pilot that gives your organization an opportunity to prove the workflow, understand completion rates, identify barriers, and refine training before expanding to the full organization.

PHASE 1

Weeks 1–6

Multi-clinic pilot

Goal: Prove the workflow and confirm completion rates.

- Launch at two to three clinics across different teams
- Assign PROs at episode creation for all active MSK patients
- Weekly champion check-ins; share early wins

What to watch out for:

- Are clinicians assigning PROs consistently?
- Are patients completing their baseline?
- Are follow-up assessments being captured?
- Where is the workflow breaking down?

Maintain momentum by sharing early wins and identifying workflow challenges.

PHASE 2

Week 6+

Full-organization expansion

Goal: Make outcomes the standard of care across the organization.

- Use learnings from pilot to adjust training and roll out to all remaining clinics and clinicians
- Enable clinician-level dashboard visibility org-wide
- Use aggregate data in performance reviews, payer talks, referrals

SUSTAIN

Build a monthly outcomes rhythm

Once the program is live, outcomes should become part of your regular leadership cadence, not a metric reviewed only periodically. The monthly dashboard should follow the outcomes funnel: how many patients you saw, how many got a PRO, how many completed a follow-up, and how many measurably improved. Each is available at the clinician, clinic, and organization levels.

Patient volume

How many visits did we have?

Total evaluations completed in the month. The denominator for every rate below.

Assignment rate

Did we assign PROs?

Share of those evaluations that had a PRO assigned.

Completion rate

Did we capture assessments?

Share of assigned patients with a baseline plus at least one follow-up.

Improvement rate

Did they improve?

Share of those patients who improved past the MCID threshold (a clinically meaningful change).

Close the loop with education

Outcomes data becomes more valuable when it drives action, and Medbridge can connect the insight from outcomes data with targeted education.

1. **Outcomes data reveals underperformance**
   Aggregate PRO data surfaces a treatment category, condition, or team that's not hitting MCID at expected rates.
2. **Targeted CE assigned from the library**
   Leadership assigns continuing education content directly from the Medbridge CE library, matched to the gap identified in the data.
3. **Insight becomes action at the point of care**
   Clinicians complete the targeted education and apply it to the next patient — closing the loop between data and clinical practice.

Your outcomes operational checklist

ALIGN

- [ ] Define why outcomes matter to patient care
- [ ] Identify an executive sponsor
- [ ] Identify clinical champions
- [ ] Standardize measures
- [ ] Confirm patient records and digital connection
- [ ] Establish success targets

CLARIFY

- [ ] Define the evaluation workflow
- [ ] Establish when PROs are assigned
- [ ] Standardize patient communication
- [ ] Define follow-up expectations
- [ ] Establish how clinicians review outcomes
- [ ] Define the discharge workflow

ENABLE

- [ ] Train clinicians on the PRO workflow
- [ ] Train clinicians on patient communication
- [ ] Train clinicians and front desk on assignment
- [ ] Train leaders on dashboard monitoring
- [ ] Make Outcomes Help Center resources accessible

SUSTAIN

- [ ] Launch a focused pilot
- [ ] Monitor assignment and completion
- [ ] Hold clinical champion check-ins
- [ ] Refine the workflow based on pilot learnings
- [ ] Expand across the organization
- [ ] Establish monthly dashboard reviews
- [ ] Use outcomes data to identify clinical opportunities
- [ ] Connect data to targeted education
- [ ] Reinforce successful workflows

Conclusion

A successful PRO program is ultimately more than the sum of the number of assessments completed. It's defined by what we do with that information.

When clinicians consistently assign outcomes, patients understand why they matter, follow-up assessments are captured, and clinicians review the data as part of care, outcomes become part of the clinical workflow.

For leaders, that creates a repeatable way to understand performance, identify opportunities, support clinicians, and reinforce a culture of clinical quality.

Align your organization. **Clarify** the workflow. **Enable** your team. **Sustain** the practice. And reap the benefits of a successful PROs program with Medbridge.