

The Client Who Felt Seen

Creating a seamless path to
care through digital access and
personalized patient engagement



Table of Contents

Chapter 1: The Road to Getting in the Door	3
The Problem: Disruption as a roadblock	3
The Solution: Paving the path to access	4
Chapter 2: Leaning into Support	5
The Problem: The weight of the world	5
The Solution: Lifting the weight.....	6
Chapter 3: The Road Forward	7
The Problem: Veering off track.....	7
The Solution: Mapping progress	8

Behavioral health organizations play a vital role in supporting the mental, emotional, and social well-being of the individuals and communities they serve.

But what if that behavioral healthcare never has a chance to be delivered?

Roadblocks to scheduling, person-centered visits, insurance eligibility, payments, and more, can stop care before it even starts.

Discover how the right tools support person-centered care, breaking down barriers to support clients, providers, and staff in achieving stronger outcomes.

The Road to Getting in the Door



THE PROBLEM

Disruption as a roadblock

The Client

- **Fighting the first step:** Ongoing feelings of anxiety and hopelessness make the thought of calling an organization for help too much to handle.
- **A closed door:** Long waits for an available appointment, complicated or no insurance, and lengthy paperwork create barriers that keep the door to help closed.
- **The day-to-day struggle:** Without support, disruptive symptoms remain and negatively affect work, relationships, and overall quality of life.

The Organization

- **Support that's out of reach:** Busy phone lines, leaving clients on hold, and no readily available appointments leave the support that could be provided to potential clients feel out of reach.
- **Trying to sift through disruption:** Piles of paperwork, non-stop phone calls, and a line of clients waiting to be checked in create an unmanageable administrative load.
- **Broken workflows burden care:** When the goal is to serve those in need, high client volumes and broken workflows impede the delivery of quality care and weaken organizational performance.

THE SOLUTION

Paving the path to access

The Client



- **There when you need it:** A quick internet search leads to an organization with easy online scheduling, offering the peace of mind that there's someone ready to help.
- **A wide-open front door:** NextGen® Self-Scheduling and Waitlist powered by Luma offer easy scheduling on one's own time, and the opportunity to get in the door sooner.
- NextGen® Patient Engage powered by Luma sends appointment reminders, remote self-check-in via text, and easy-to-complete digital intake forms within NextGen® PxP Portal—a reminder that treatment is ahead.

The Organization



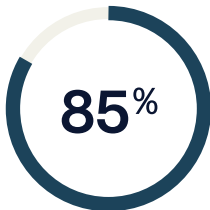
- **There when they need you:** A strong online presence, backend scheduling, and intake automations allow the organization to confidently open the door to clients in need.
- **Eliminating the friction:** Client scheduling, waitlist automations, and NextGen® Navigator powered by Luma alleviate manual backend operations so the focus can be on the clients.
- **Preparing for personalized care:** Digital intake, history, medications, and labs can be reviewed in advance, ensuring the most personalized care possible.

“I can say my team has been on the phone less time. They usually spend 4 to 5 minutes on a call, and now it's at the tip of their fingers.”

Tracy Lara, Operations Manager
Valle del Sol, Inc.



reduction in
no-shows with
NextGen Patient
Engage powered
by Luma



85% of calls
processed by
Navigator
without human
intervention

2-3
HOURS

2-3 hours
saved per staff
member each
day on manual
communications

Leaning into Support



THE PROBLEM

The weight of the world

The Client

- **A disappointing disconnect:** The first visit can feel daunting. Worries about the unknown and fear that an individual won't be understood can develop. Clients hope to connect with the provider, but sometimes the provider barely looks up from the computer.
- **Still unseen:** Despite physically getting in the door, emotionally, the client feels unseen. The hopes of connecting and having someone to lean on fade away.
- **Now what?** Taking the first step is hard, but after feeling disconnected and unseen on the journey for help, is it even worth going back?

The Organization

- **Losing the balance:** With high client volumes and important details to note, provider focus during the visit shifts to paperwork, not the client.
- **A job that never ends:** Bringing notes home, missing out on family life, and what feels like endless charting takes an emotional toll, causing burnout.
- **What's next?** Burnout and compassion fatigue leave a provider wondering how, and if, they can continue showing up for clients.

THE SOLUTION

Lifting the weight

The Client



- **Finding connection:** Sitting down with a provider, connecting face-to-face, and feeling their presence during the visit offers the support and understanding the individual has been looking for.
- **Truly seen:** Active engagement, personalized conversation, and a space to be heard and respected are the first steps to establishing a care plan that will fit with the client's life.
- **The next steps:** With a provider who truly makes the client feel seen, they can confidently look ahead to the next steps on their care journey.

The Organization



- **Finding the balance:** Being present for the client, not the paperwork, should be normal. Let AI document in the background and capture what the provider needs, without hindering the human element of care.
- **Lifting the burden:** Step away from the keyboard and back in front of clients with **NextGen® Clinical AI**. End after-hours charting and eliminate the documentation burden.
- **A newfound confidence:** The ability to connect with the client, without the burden of notetaking and after-hours charting, reinvigorates the provider's passion for medicine. Now, they show up for clients with confidence.

“Mobile AI is honestly seamless. It gets the provider out from behind the computer and back in front of the patient to be able to have that connection to the patient again. From what I have seen, the patients are loving it.”

*Amie Flannery, Practice Management System Administrator
Preferred Family Healthcare*

2.5
HOURS

~2.5 hours back
per provider per
day with NextGen
Clinical AI



57% reduction
in after-hours
charting

5-10
INCREASE

5-10 more
clients seen per
provider per day

The Road Forward



THE PROBLEM

Veering off track

The Client

- **Gaps in care:** Continued scheduling inconveniences and struggles with ordering prescriptions hinder ongoing care.
- **Payments that pile up:** Insurance confusion and complicated payment options leave the client putting off bills.
- **Feeling alone:** After the first visit, uncertainty about what's next and if they've really found support feels isolating.

The Organization

- **Availability roadblocks:** Client volume, charts, and continued demand restrict time for individual client follow-up.
- **Slowing the revenue cycle:** Lack of coverage detection, claim monitoring, and client-friendly payment options leave staff overwhelmed with manual processes as cash flow slows.
- **The ongoing weight:** Uncertainty around clients' continued struggles and worrying that they are missing the tools they need contribute to provider burnout and fatigue.

THE SOLUTION

Mapping progress

The Client



- **Support at your fingertips:** A patient portal for secure communication, prescription refills, and follow-up scheduling keeps the client on track—they're just a click away from support.
- **Payments you can plan for:** NextGen® Patient Pay powered by InstaMed offers convenient online payment options and payment plans that allow the client to easily pay on their own time.
- **One foot in front of the other:** With a follow-up visit scheduled and ongoing care management resources, it's easier to take steps forward each day.

The Organization



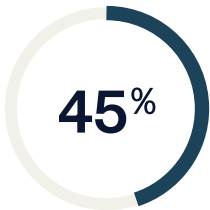
- **Continue to be there:** Personalized and proactive virtual care coordination through CareHarmony gives the provider insights into client progress between visits and on the impact of delivered care.
- **Insights that pay:** An automated rules engine and staff augmentation through NextGen® RCM Services helps catch errors, minimize days in A/R, and expedite charge processing and claim resolutions.
- **Practice confidently:** Charts complete, clients supported, staff burdens lifted. Thanks to integrated patient engagement, AI documentation, and billing solutions, the organization can seamlessly deliver care.

“We’ve made huge improvements in the short amount of time that NextGen has been on board, and we’re looking forward to a strong finish to our fiscal year.”

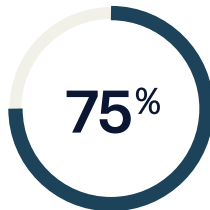
Sean Fitzpatrick, CFO
CFG Health Network



30% denial resolution



45% faster claim resolutions



75% of claims auto-corrected

< 1% claims rejection rate

When providers, staff, and clients have access to the right tools, care is not just delivered—it makes a real difference.

When clients feel seen, heard, and understood, they feel a connection that leaves them more likely to stay engaged and invested in their care journey.

Integrated, automated, and user-friendly solutions empower your organization to deliver the experience your clients need and deserve. Whether you're delivering integrated, whole-person care, or focus solely on behavioral health, the right tools make an impact.

See what NextGen Healthcare solutions can do for your organization.
Connect with us today.



Talk to an expert today.

Partner with us at 855-510-6398 or results@nextgen.com

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