A new view on patient retention: Follow-up letters

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Pacific University

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A new view on patient retention: Follow-up letters

Abstract
Patient retention is critical to a successful optometric practice. Patient education aids retention by promoting compliance and regular care. This study was conducted to determine if informational follow-up letters sent to the patient would better educate patients about their visual system and influence the patient to return to the same clinic for future care. Educational letters were sent to patients within one week of their vision examinations. To assess the value of the letter, a questionnaire was mailed one week later. Of the 74 questionnaires mailed to patients, 26 were completed and returned. The majority of patients were pleased to have received the letter, and most were somewhat influenced to return to the clinic based on the impression the letter created.

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Degree Name
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Committee Chair
Denise Goodwin

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A New View on Patient Retention:
Follow-Up Letters

By
Annelle Maygren
Trixie Eakin

A thesis submitted to the faculty of the
College of Optometry
Pacific University
Forest Grove, Oregon
For the degree of
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Advisor:
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A New View on Patient Retention: Follow-Up Letters

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Date: May 1, 2002
Annelle Maygren

Annelle Maygren graduated from Black Hills State University in Spearfish, South Dakota in 1999 with a Bachelor of Science degree, majoring in Chemistry, minoring in physics and mathematics. She is currently attending Pacific University College of Optometry and expects to graduate in May 2003. Her plans for the future include returning to her hometown of Mount Shasta, California where she will practice optometry.

Trixie Eakin

Trixie Eakin was born in Dallas, Oregon. She served three and a half years in the U.S. Army upon graduation from high school. She graduated Cum Laude with a Bachelor of Science degree in Biology from Oregon State University in Corvallis, Oregon. She is currently attending Pacific University College of Optometry in Forest Grove, Oregon.
Abstract

Patient retention is critical to a successful optometric practice. Patient education aids retention by promoting compliance and regular care. This study was conducted to determine if informational follow-up letters sent to the patient would better educate patients about their visual system and influence the patient to return to the same clinic for future care. Educational letters were sent to patients within one week of their vision examinations. To assess the value of the letter, a questionnaire was mailed one week later. Of the 74 questionnaires mailed to patients, 26 were completed and returned. The majority of patients were pleased to have received the letter, and most were somewhat influenced to return to the clinic based on the impression the letter created.
A New View on Patient Retention: Follow-Up Letters

**Introduction:**

Optometry is both our profession and our business. In an ideal world, the issues of maintaining a successful business would not come into play when caring for patients. However, without effective practice management, it is difficult to keep a practice solvent. Retaining patients is very important for any doctor. A doctor who focuses on attracting new patients while not maintaining the satisfaction of current patients is creating a leaking bucket.\(^1\) It has been show to cost 5-6 times more for a practice to attract new patients than to hold on to existing ones.\(^2,3\)

The retention of reliable and loyal patients provides a stable patient base from which to build a solid practice, thereby contributing to its economic stability.\(^4\) Ninety percent of patients base the choice of practitioner on their perception of the service experienced by themselves or others.\(^2,5\) To improve patient retention, patient satisfaction is paramount.\(^6\) One important aspect of this satisfaction in the optometric practice is communication and patient education, by the doctor and the staff.\(^7\) Patients need to be educated about the importance of lifetime optometric care. Good communication skills are among the most important skills that optometrists must develop in order to keep the patient informed and involved in their care.\(^6,8\)

What can be done to improve patient education and satisfaction? During a comprehensive vision examination the patient receives a large amount of information regarding their vision and ocular health. It is difficult for the patient to remember everything they are told.\(^6\) To aid the patient, a letter that reinforces the education received in the exam room can be sent to the patient following the exam. In addition to
helping the patient recall pertinent exam data, the letter can serve to aid in the patient’s understanding of their condition by providing them with terminology and treatment options. An educated patient will also have better compliance with recommended treatments, feel more comfortable making decisions, and will have more confidence in returning to the examiner.6

We were interested in knowing if a patient receiving an informative summary letter from their optometrist would feel influenced to return to the same clinic for future care and if this letter reinforced the patient’s confidence in the examiner and perception of care. The hypothesis was that if the patient received an informative letter summarizing the findings of the exam and explaining their significance to the patient, the patient would feel better educated about their visual system causing them to return to the same clinic for future care.

Experimental Design:

To evaluate the reaction of patients receiving a letter summarizing the findings of the vision examination, educational letters were sent to patients within one week of their vision examination at the Pacific University Family Vision Center (See Appendix A). A questionnaire was then mailed to the patient the following week (See Appendix B). A postage-paid, self-addressed envelope was enclosed with the questionnaire to facilitate straightforward return. The questionnaire was designed to determine the value of the letter to the patient as well as whether the patient would be more likely to return to the Pacific University Family Vision Center as a result of the letter.
Educational letters were sent to 74 patients who received a comprehensive vision examination between January 2002 and April 2002.

Data Analysis:

Of the 74 questionnaires mailed to patients, 26 were returned. This equates to a 35% rate of return. Table 1 shows the raw number and percent response to each statement.

<table>
<thead>
<tr>
<th>Table 1: Responses for each Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel more informed about my visual condition(s) after reading the letter.</td>
<td>44%</td>
<td>40%</td>
<td>8%</td>
<td>8%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>11</td>
<td>10</td>
<td>2</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>The content of the letter accurately represented the topics discussed at my eye exam.</td>
<td>48%</td>
<td>32%</td>
<td>16%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>12</td>
<td>8</td>
<td>4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>I feel that the time it took to read the letter was worthwhile.</td>
<td>52%</td>
<td>28%</td>
<td>16%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>13</td>
<td>7</td>
<td>4</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>The letter answered any remaining questions I had about my visual condition.</td>
<td>26%</td>
<td>39%</td>
<td>30%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>9</td>
<td>7</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>I was pleased to receive the letter.</td>
<td>56%</td>
<td>28%</td>
<td>12%</td>
<td>4%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>14</td>
<td>7</td>
<td>3</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>I would return to Pacific University Vision Center for my future eye care needs.</td>
<td>64%</td>
<td>28%</td>
<td>8%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td></td>
<td>16</td>
<td>7</td>
<td>2</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>The letter influenced my decision to return to Pacific University Vision Center.</td>
<td>29%</td>
<td>29%</td>
<td>24%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>6</td>
<td>5</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

Total Survey Response: 35%
It is interesting to note that there were only two “Strongly Disagree” responses. Both responses were in response to the statement regarding the influence of the letter on the patient’s decision to return to the Pacific University Family Vision Center. Of these two responses, one was a university employee who reported that they would return to Pacific University Family Vision Center unless something major occurred to make them go elsewhere. The other response indicated that he was not pleased to have received the letter, and he did not feel that the time it took to read the letter was worthwhile.

Table 2 separates the questionnaire responses by age and gender. The majority of patients scheduled represented three broad age groups: 0-19 years, 20-29 years, and 40-49 years.

<table>
<thead>
<tr>
<th>Table 2 Age and Gender Versus Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-19</td>
</tr>
<tr>
<td>Letters Mailed</td>
</tr>
<tr>
<td>Surveys Returned</td>
</tr>
<tr>
<td>% Returned - Gender</td>
</tr>
<tr>
<td>% Returned - Age</td>
</tr>
</tbody>
</table>

Of the 26 respondents, 61.5% were female and 38.5% were male. As indicated in Table 3, in most categories men chose neutral and disagreed with the survey statements more often than women.
<table>
<thead>
<tr>
<th>Gender % Response per Statement</th>
<th>Gender</th>
<th>Strongly Agree/Agree</th>
<th>Neutral</th>
<th>Disagree/Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel more informed about my visual condition(s) after reading the letter.</td>
<td>F</td>
<td>94</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>60</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>The content of the letter accurately represented the topics discussed at my eye exam.</td>
<td>F</td>
<td>88</td>
<td>19</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>70</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>I feel that the time it took to read the letter was worthwhile.</td>
<td>F</td>
<td>88</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>60</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>The letter answered any remaining questions I had about my visual condition.</td>
<td>F</td>
<td>63</td>
<td>31</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>50</td>
<td>20</td>
<td>10</td>
</tr>
<tr>
<td>I was pleased to receive the letter.</td>
<td>F</td>
<td>100</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>50</td>
<td>30</td>
<td>10</td>
</tr>
<tr>
<td>I would return to Pacific University Vision Center for my future eye care needs.</td>
<td>F</td>
<td>88</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>90</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>The letter influenced my decision to return to Pacific University Vision Center.</td>
<td>F</td>
<td>50</td>
<td>19</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>M</td>
<td>40</td>
<td>20</td>
<td>20</td>
</tr>
</tbody>
</table>

**Discussion:**

The data collected provides a glimpse into the possible influence educational follow-up letters could have. Unfortunately, due to the limited quantity of data, no significant conclusions can be supported. It can be said, however, that of those patients who received an educational summary letter and replied to the questionnaire, the majority were pleased to have received it. The majority were somewhat influenced by the letter to return to the Pacific University Family Vision Center because of the impression created by the letter.

Patient response to the questionnaire (35%) was exceptionally high. The average rate of return, without inducement, for a professionally prepared and distributed questionnaire is 20%. Typically those who respond to a questionnaire are those who have strong feelings of dissatisfaction or satisfaction. The high rate of return, positive response choices, and patient comments all support the hypothesis that a patient receiving
an informational letter would feel better educated about their visual system and would be more likely return to the same physician for future care.

Especially valuable were the comments. Of the 26 returned questionnaires, 15 included comments regarding the letter, specific statements in the questionnaire, the intern providing care the day of their visit, or the Pacific University Family Vision Center and Pacific University.

The following are some examples of comments written by patients in support of the letters:

"...I did appreciate the effort and time that was taken to inform me."

"...I thought the follow-up letter was an excellent, personal touch."

"I appreciate being sent a letter regarding my visit with information about it."

The process of preparing each letter from gathering patient information to mailing took approximately 5-10 minutes each. The most time intensive undertaking was composing the necessary paragraphs to be used in the letters. Each paragraph was designed to provide as much plain language information as possible in 4-5 lines. Special care was taken in preparing the letters because the wording of the letters was thought to determine the effectiveness of the letters.8

Due to the limited data accumulated, further research is required to make any significant conclusions regarding the effectiveness of educational summary letters to patients following a vision examination.
Conclusion

Many other factors, such as friendliness of the staff, efficiency of the office, and basic eye care play a very important role in patient satisfaction, and therefore loyalty. As a practitioner in a service-oriented business, a personal letter specifically discussing a patient’s vision presents an effective way to maintain a patient base. For a little extra time and effort, it is possible that one letter can make a very big difference to a patient and consequently to your practice.
References:


5. Americans Doctors Site Management. Website:
   www.americansdoctor.com/sm_main.htm#PR


7. Plasker, Eric (dr.), “Patient Retention In the Information Age.” Website:
   www.thefamilypractice.net/news/06.htm


10. List, D. Know Your Audience. June 2002. Online Book Website:
     www.audiencedialogue.org

Appendix A

Sample Letters
Myopia and Computer Eye Strain
Hyperopia and Astigmatism
Presbyopia
Mrs. Jane Doe 1  
123 4th Street  
Forest Grove, Oregon 97116  

January 21, 2002  

Dear Mrs. Doe 1,  

It was a pleasure working with you this week at the Pacific University Family Vision Center. It can be difficult to remember all of the details we discussed at your visit so we have included a summary of the information we discussed during the examination.  

During your vision examination we discussed nearsightedness and visual stress with computer use.  

Nearsightedness, also known as myopia, causes objects to not focus properly on the retina (the back of the eye). The eyeball can either be too long or the focusing mechanism may be too strong to create a clear image. This causes objects to appear blurry. Nearsightedness is often inherited or it can develop due to long periods of focusing on near tasks. Nearsightedness may develop rapidly and require frequent changes in glasses or contact lens prescriptions.  

The symptoms of nearsightedness are blurred vision, difficulty seeing distant objects, squinting, eyestrain, or headaches. Nearsightedness is easily treated using prescription glasses or contact lenses. Refractive surgery may be able to correct some forms of nearsightedness in adults.  

Working on a computer for extended periods of time can result in many symptoms. These symptoms include headaches, blurry vision, fatigue, dry eyes, and back or neck aches.  

To help prevent or relieve these symptoms, every 15 minutes you should relax your eyes by looking across the room for at least 15 seconds. Prescription computer glasses will also help to relax the eyes.  

Comfort in using the computer will also help to alleviate the symptoms you have. The monitor should be positioned below eye level. The chair and table heights should allow the feet to be flat on the floor. The chair should support the back and allow about a 90-degree angle between the bicep and the forearm while using the keyboard. It is important to be comfortable.  

Thank you for allowing us to provide for your vision care needs. If you have any questions on this material or any other items related to your vision, please feel free to call us at xxx-xxx-xxxx.  

Sincerely,  

Dr. U. C. Better  
Optometric Physician
Mrs. Jane Doe 2  
123 4th Street  
Forest Grove, Oregon 97116  

January 21, 2002

Dear Mrs. Doe 2,

It was a pleasure working with you this week at the Pacific University Family Vision Center. It can be difficult to remember all of the details we discussed at your visit so we have included a summary of the information we discussed during the examination.

During your vision examination we discussed farsightedness and astigmatism.

Farsightedness, also known as hyperopia, causes objects to not be focused properly on the retina (the back of the eye). The eyeball can either be too short or the focusing mechanism can be too weak to create a clear image. This causes objects to appear blurry. Farsightedness is often inherited.

The symptoms of farsightedness are blurred vision, difficulty seeing objects up close, eyestrain, aching eyes, or headache. Farsightedness is easily treated using prescription glasses or contact lenses. Refractive surgery may be able to correct some forms of farsightedness in adults.

Astigmatism is due to a variation in the shape of the front of the eye. It does not allow objects to be properly focused on the retina (back of the eye). This causes objects to appear blurry. Astigmatism is commonly present in combination with nearsightedness (myopia) or farsightedness (hyperopia). Astigmatism is very common. The cause is unknown, but it is often inherited.

The symptoms of astigmatism are blurred vision at all distances, squinting, eye discomfort, eye irritation, distortion of vision, or headaches. Astigmatism is easily treated using prescription glasses or contact lenses. Refractive surgery may be able to correct some forms of astigmatism in adults. There is no way to prevent or cure astigmatism. If you do not currently wear corrective lenses or your prescription has changed, you may need time to adjust to wearing glasses or contact lenses.

Thank you for allowing us to provide for your vision care needs. If you have any questions on this material or any other items related to your vision, please feel free to call us at xxx-xxx-xxxx.

Sincerely,

Dr. U. C. Better  
Optometric Physician
January 21, 2002

Dear Mrs. Doe 3,

It was a pleasure working with you this week at the Pacific University Family Vision Center. It can be difficult to remember all of the details we discussed at your visit so we have included a summary of the information we discussed during the examination.

During your vision examination we discussed presbyopia.

Presbyopia begins to develop after the age of 40. The lens of the eye begins to lose elasticity causing a loss of focusing power of the eye. Presbyopia is a normal aging process of the eye. People often have presbyopia in combination with nearsightedness (myopia), farsightedness (hyperopia) or astigmatism.

The symptoms of presbyopia are headache, tired eyes, eyestrain, and a decreased ability to focus at near. You may realize that you need to hold reading material further away in order to focus on it. Presbyopia is easily treated using bifocals, reading glasses or contact lenses. As the ability to focus on near objects decreases, your prescription will need to be changed. There is no way to prevent or cure presbyopia.

Thank you for allowing us to provide for your vision care needs. If you have any questions on this material or any other items related to your vision, please feel free to call us at xxx-xxx-xxxx.

Sincerely,

Dr. U. C. Better
Optometric Physician
Appendix B

Letter Accompanying
the Questionnaire
April 17, 2002

Dear Mrs. Doe,

During a comprehensive vision examination you receive a large amount of information regarding your vision and ocular health. It can be difficult to remember everything you have been told.

As your eye care practitioners, we have sent you an informative summary letter that is designed to reinforce the education received in the exam room.

For our thesis project we are hoping to determine the effectiveness of patient letters and if the letters are helpful to patients. We would appreciate it if you would take the time to complete the enclosed survey regarding the letter you received a few days ago that pertained to your eye exam. An addressed, postage-paid envelope has been provided for your convenience.

Records of this project will be maintained in a confidential manner and no name-identifiable information will be released.

Thank you for taking the time to assist us in our research.

Sincerely,

Optometric Intern

Optometric Intern
# Informative Letter Questionnaire

Age: ______ Gender: Male / Female

Please grade how strongly you agree or disagree with the statement below on a scale of 1 to 5. Please return this survey in the envelope provided at your earliest convenience. Thank You.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel more informed about my visual condition(s) after reading the letter.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The content of the letter accurately represented the topics discussed at my eye exam.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I feel that the time it took to read the letter was worthwhile.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The letter answered any remaining questions I had about my visual condition.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I was pleased to receive the letter.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I would return to Pacific University Vision Center for my future eye care needs.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>The letter influenced my decision to return to Pacific University Vision Center.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Comments:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

If you have any questions regarding this questionnaire please contact Interns X and/or X at Pacific University Family Vision Center at xxx-xxx-xxxx