



Health Care Transformation Task Force

86Borders: Effective Patient Engagement

September 15, 2026

Partners in Promoting Value



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Effective Patient Engagement for **Complex Populations**

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MORE OUTREACH ≠ MORE ENGAGEMENT

A call made, text delivered, or reminder sent tells us we reached a phone. It doesn't tell us whether we helped a patient move forward. The question is simple: What is standing between this patient and action?



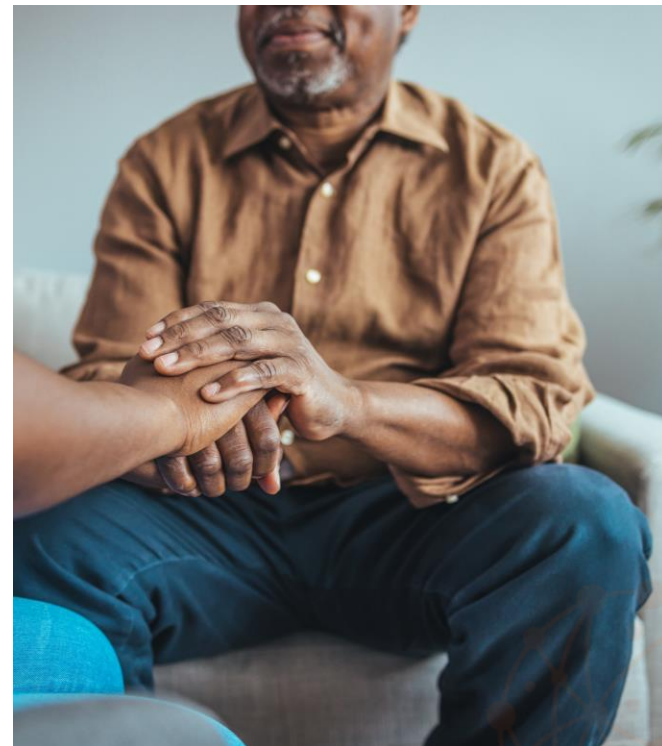
Look Beyond the Care Gap

There may be more behind that missed next step

Transportation | Social needs | Confusing benefits
Provider access | Health literacy | Cost concerns
Work & family responsibilities | Technology & access
Previous health care experiences | Competing priorities

Start with the right questions:

- What is preventing action?
- What does this patient need next?
- How can we make that next step easier?





Trust Is an Engagement Strategy

Effective engagement starts with relationships, not reminders.

- Listen and understand
- Communicate clearly
- Meet patients where they are
- Provide locally aligned support
- Be consistent
- Do what you say
- Stay with the patient

Trust grows through follow-through.

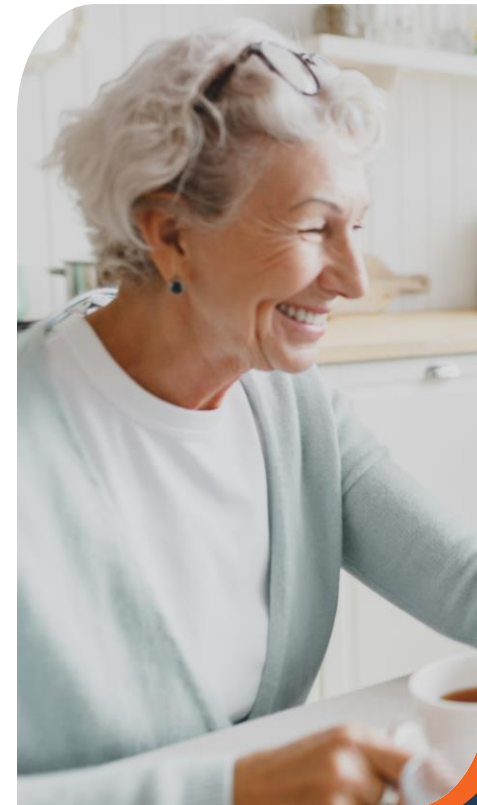


Make the Next Step Easier

Move from notification to navigation.

- Understand the need
- Explain the benefit
- Identify the right resource
- Address the barrier
- Coordinate the next step
- Confirm what happens next

Effective engagement reduces friction between the patient and care.



Persistent, Not Repetitive



Repetitive

- Same outreach
- Same message
- Same barrier
- Same result



Persistent

- Listen
- Learn
- Adapt
- Support
- Follow through

| The first “no” — or no response — doesn’t always mean the end of engagement.

Measure Movement, Not **Just Activity**

Outreach Activity

- Calls made
- Texts sent
- Contact rate
- Attempts per member

Meaningful Action

- Appointments scheduled/completed
- Care gaps closed
- Services accessed
- Barriers resolved
- Patients re-engaged

! **Contact is a step. Action is the goal.**





Four Questions to Take **Back to Your** **Organization**

- Do we know **WHY** patients aren't acting — or only that they aren't?
- Are we designing engagement around our workflow or the patient's reality?
- Who owns follow-through after contact is made?
- Are we measuring outreach activity or meaningful patient action?





Questions & Discussion

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for Complex Populations

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Thank you for Joining

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