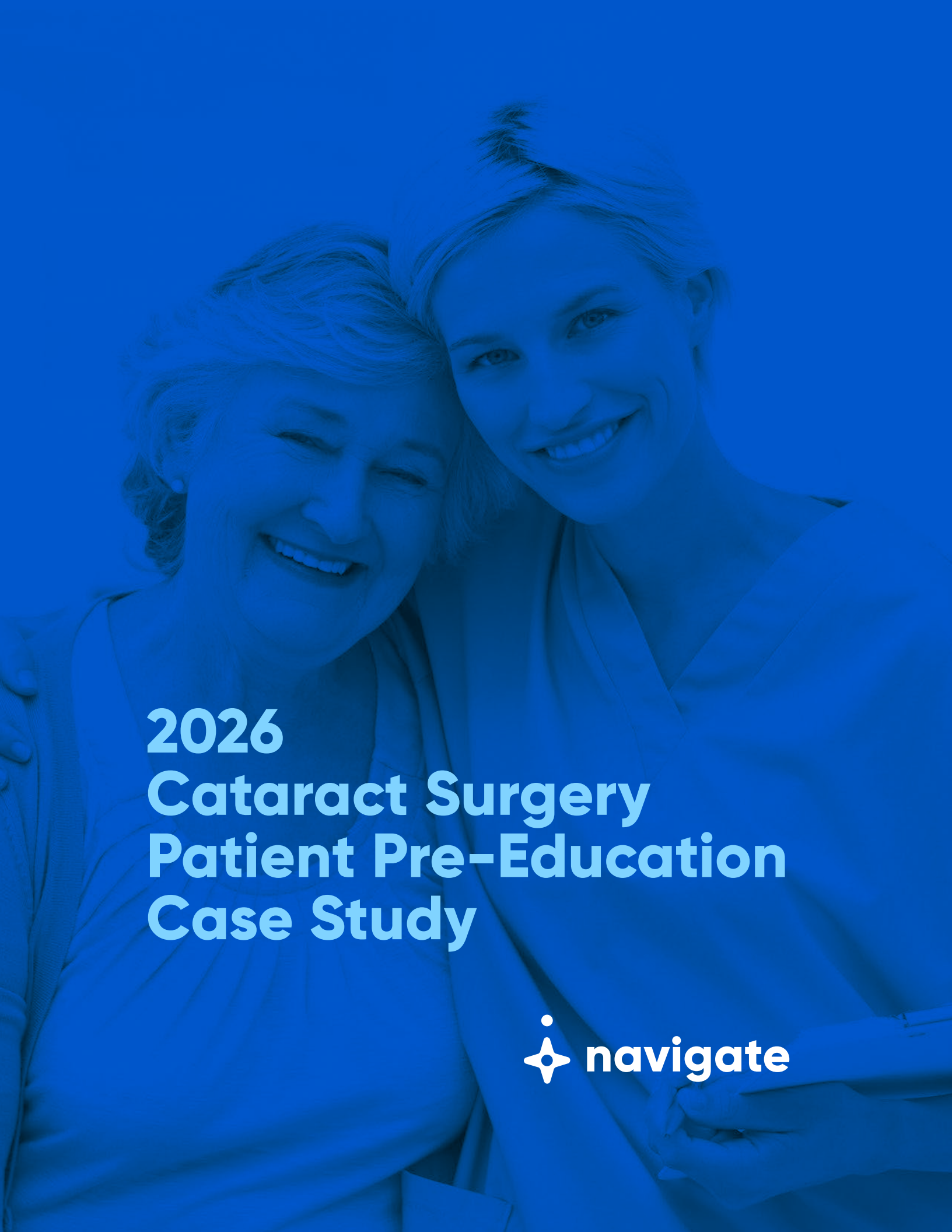




2026 Cataract Surgery Patient Pre-Education Case Study



Navigate Patient Solutions 2026 Cataract Surgery Patient Pre-Education Case Study

Navigate Patient Solutions conducted an analysis of the performance across 11 participating providers within three practices from July 2025 to February 2026.

The analysis evaluated outcomes for patients who received Navigate education support versus patients who did not receive Navigate support during the evaluation period.

Across all participating providers, Navigate-supported patients demonstrated stronger performance across two of the most economically significant cataract practice KPIs:

- Higher consult-to-surgery conversion (“Surgical Capture”)
- Higher Advanced Technology adoption rates

Key findings include:

- Navigate-supported patients achieved a **78.6% Surgical Capture rate versus 70.5% among unsupported patients**
- Advanced Technology adoption increased from **11.1% to 18.8% among Navigate-supported patients**

These findings suggest Navigate is functioning as a meaningful patient conversion and education infrastructure layer that positively influences *both* procedural throughput and premium technology utilization.

Operational Performance Summary

	Non-Navigate Patients	Navigate-Supported Patients	Performance Delta
Scheduled Consults (Eligible Patients)	1,042	2,179	—
Completed Evaluations	602	1,941	—
Surgical Capture Rate	70.5%	78.6%	+8.1 pts
Advanced Technology Adoption	11.1%	18.8%	+7.7 pts

Estimated Economic Impact

To avoid double-counting financial impact, the economic model below integrates both Surgical Capture and Advanced Technology adoption into a single margin framework.

The model assumes:

- Two eyes per converted patient
- Advanced Technology adoption measured at the patient level
- \$1,200 incremental margin per premium surgical eye
- \$500 margin per standard cataract surgical eye

	Non-Navigate Patients	Navigate-Supported Patients
Surgical Capture Rate	70.5%	78.6%
Advanced Technology Adoption	11.1%	18.8%
Expected Surgical Eyes (per 100 Completed Evaluations)	141.0	157.2
Expected Premium Surgical Eyes (per 100 Completed Evaluations)	15.7	29.6
Expected Standard Surgical Eyes (per 100 Completed Evaluations)	125.3	127.6
Estimated Margin (per 100 Completed Evaluations)	~\$81,500	~\$99,300
Estimated Margin (per Completed Evaluation)	~\$815	~\$994
Estimated Incremental Margin (per Completed Evaluation)	—	+~\$179

In only eight months, Navigate materially increased the expected economic value generated from each completed cataract evaluation progressing through the surgical funnel.

Aggregate Financial Impact

The Navigate program investment for these practices across the evaluation period totaled \$255,140. Applying the modeled margin improvement (~\$179 per completed evaluation) across the 1,941 completed Navigate-supported evaluation population suggests:

Estimated incremental margin impact: \$347,000

Based on the modeled analysis, Navigate-generated incremental margin significantly exceeds program investment during the evaluation period.

Additional Operational Value

In addition to the measurable financial impact outlined above, practices have also reported meaningful *time savings* associated with Navigate support.

By handling portions of the patient education and counseling process, Navigate is able to reduce the burden on physicians, counselors, and technicians during the cataract evaluation journey.

In this study, Navigate Patient Educators averaged 175 hours per month spent with patients over the first eight months. Navigate Patient Educators save practices, on average, 24 minutes per patient. In the last month of this study (February 2026), all 11 surgeons were onboarded and active. Navigate Patient Educators spent a total of 307 hours educating their patients.

Calculated at a rate of \$80 per hour, Navigate saved \$26,000 of staff time in just 1 month

While difficult to quantify directly, several practices, have reported leveraging these efficiency gains into increased patient volume and additional cataract evaluation capacity.*

*These operational benefits are not included within the financial analysis presented and may represent additional unmodeled value.

Strategic Observation

The data suggests Navigate is functioning as more than a traditional patient outreach or administrative support program.

Observed performance patterns indicate the service may reduce patient hesitation, improve understanding of surgical options, and decrease friction between consultation and surgical scheduling.

This effect appears particularly relevant within high-volume cataract environments where:

- Physician counseling time is constrained
- Staff education workflows vary by location
- Patient decision-making consistency impacts procedural economics

Even modest improvements in consult-to-surgery conversion and premium adoption create a disproportionate financial impact due to the margins of cataract surgery and Advanced Technology utilization.

Ready to Learn More?

Scan the code to learn more about how Navigate educates patients, decrease no-shows, create more ATIOL conversions.



A smiling woman with blonde hair, wearing a white lab coat, is the central figure. She is looking towards the camera with a friendly expression. The image is overlaid with a semi-transparent blue filter. The word "Appendix" is written in white, bold, sans-serif font on the left side of the image.

Appendix

Practice-Level Performance Analysis: Practice A

Metric	Value
Providers Supported	1
Evaluation Period	Jul 1, 2025 - Feb 28, 2026
Navigate-Supported Scheduled Consults	197
Navigate-Support Completed Evaluations	182
Navigate Program Investment	\$26,400

KPI Comparison

	Non-Navigate Patients	Navigate-Supported Patients	Performance Delta
Scheduled Consults (Eligible Patients)	165	197	—
Completed Evaluations	123	182	—
Surgical Capture Rate	64.2%	72.5%	+8.3 pts
Advanced Technology Adoption	21.5%	27.3%	+5.8 pts

Estimated Economic Impact

	Non-Navigate Patients	Navigate-Supported Patients
Expected Surgical Eyes (per 100 Completed Evaluations)	128.3	145.0
Expected Premium Surgical Eyes (per 100 Completed Evaluations)	27.6	39.6
Expected Standard Surgical Eyes (per 100 Completed Evaluations)	100.7	105.4
Estimated Margin (per 100 Completed Evaluations)	~\$83,100	~\$100,200
Estimated Margin (per Completed Evaluation)	~\$831	~\$1,002
Estimated Incremental Margin (per Completed Evaluation)	—	+~\$171

Applying the modeled incremental margin improvement across the 182 Navigate-supported completed evaluations suggests:

Estimated incremental margin impact:	~\$31,000
Navigate program investment during the evaluation period:	\$26,400
Estimated positive net margin impact:	~\$4,600

Practice-Level Performance Analysis: Practice B

Metric	Value
Providers Supported	6
Evaluation Period	Jul 1, 2025 – Feb 28, 2026
Navigate-Supported Scheduled Consults	993
Navigate-Support Completed Evaluations	837
Navigate Program Investment	\$121,480

KPI Comparison

	Non-Navigate Patients	Navigate-Supported Patients	Performance Delta
Scheduled Consults (Eligible Patients)	416	993	—
Completed Evaluations	195	837	—
Surgical Capture Rate	73.9%	78.6%	+4.7 pts
Advanced Technology Adoption	6.9%	16.7%	+9.8 pts

Estimated Economic Impact

	Non-Navigate Patients	Navigate-Supported Patients
Expected Surgical Eyes (per 100 Completed Evaluations)	147.8	157.1
Expected Premium Surgical Eyes (per 100 Completed Evaluations)	10.2	26.2
Expected Standard Surgical Eyes (per 100 Completed Evaluations)	137.6	130.9
Estimated Margin (per 100 Completed Evaluations)	~\$81,100	~\$96,900
Estimated Margin (per Completed Evaluation)	~\$811	~\$969
Estimated Incremental Margin (per Completed Evaluation)	—	+~\$158

Applying the modeled incremental margin improvement across the 837 Navigate-supported completed evaluations suggests:

Estimated incremental margin impact:	~\$132,000
Navigate program investment during the evaluation period:	\$121,480
Estimated positive net margin impact:	~\$10,500

Practice-Level Performance Analysis: Practice C

Metric	Value
Providers Supported	4
Evaluation Period	Jul 1, 2025 – Feb 28, 2026
Navigate-Supported Scheduled Consults	989
Navigate-Support Completed Evaluations	921
Navigate Program Investment	\$107,260

KPI Comparison

	Non-Navigate Patients	Navigate-Supported Patients	Performance Delta
Scheduled Consults (Eligible Patients)	461	989	—
Completed Evaluations	284	921	—
Surgical Capture Rate	71.2%	79.9%	+8.8 pts
Advanced Technology Adoption	9.9%	19.2%	+9.3 pts

Estimated Economic Impact

	Non-Navigate Patients	Navigate-Supported Patients
Expected Surgical Eyes (per 100 Completed Evaluations)	142.3	159.9
Expected Premium Surgical Eyes (per 100 Completed Evaluations)	14.1	30.7
Expected Standard Surgical Eyes (per 100 Completed Evaluations)	128.2	129.2
Estimated Margin (per 100 Completed Evaluations)	~\$81,100	~\$101,400
Estimated Margin (per Completed Evaluation)	~\$811	~\$1,014
Estimated Incremental Margin (per Completed Evaluation)	—	+~\$203

Applying the modeled incremental margin improvement across the 921 Navigate-supported completed evaluations suggests:

Estimated incremental margin impact:	~\$187,000
Navigate program investment during the evaluation period:	\$107,260
Estimated positive net margin impact:	~\$80,000

Key Operational Observations

Practice A

- Demonstrated meaningful improvement across both surgical capture and Advanced Technology adoption metrics
- Surgeon has been live with Navigate since July 1, 2025 and represents the sole supported provider within the practice
- The consistency of observed improvement across both conversion and premium utilization metrics suggests strong workflow integration and patient engagement effectiveness

Practice B

- Demonstrated one of the strongest observed improvements in Advanced Technology adoption across the evaluated practices
- The majority of participating surgeons did not go live until late November 2025, limiting the amount of available post-implementation surgical data during the evaluation period
- Surgeon, who went live on July 1, 2025, demonstrated particularly strong performance:
 - 80.1% surgical capture rate
 - 20.3% Advanced Technology adoption
- Surgeon results suggest financial impact may increase further as additional providers mature within the Navigate workflow over a longer evaluation window

Practice C

- Demonstrated meaningful improvement across both surgical conversion and Advanced Technology utilization metrics
- Surgeon #1 went live on July 1, 2025, while the remaining three providers were onboarded in late November 2025
- Similar to Practice B, the shortened post-implementation evaluation window for most participating providers likely understates steady-state program impact
- Observed results suggest additional opportunity exists as newer providers mature within the Navigate workflow