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On the topic:
Effective Patient Scheduling in the Medical Practice
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Effective Patient Scheduling in the Medical Practice

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INTRODUCTION
How To Create a Positive First and Lasting Impression

- Researchers have found that a first impression is made within the **first seven (7) seconds** after you meet someone new.
- When you meet someone for the first time, they are taking a rapid inventory of your gait, your smile, your handshake, and how you present yourself.
- As you are making your approach, they are deciding if they can trust you, if you are genuinely nice, if they want to know and work with you - so many questions are answered in those first few critical seconds based on what they see, and how you make them feel.
<table>
<thead>
<tr>
<th>Tip</th>
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<tr>
<td>Be mindful of how you appear to others</td>
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<td>Be on time</td>
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<td>Watch the body language</td>
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<td>Turn off your cell phone</td>
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<td>Begin the conversation</td>
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<td>Keep it positive</td>
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<td>Pay attention</td>
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<td>Don't forget your manners</td>
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<td>Just relax and be yourself</td>
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Goals of Successful Patient Scheduling

To maximize the number of patients seen while maintaining quality of care, patient satisfaction and patient access.

Have reporting process to track wait times, no-shows, appointment reminders, etc.

Use data to make more informed decisions that improve operations, efficiencies and patient service.

Effective Patient Scheduling

If your patients are waiting more than 15 minutes to be seen, that is too long. Several things could be happening that are within your control:

- Too little time scheduled for each patient
- Too many patients scheduled
- Facility physical arrangements and staff not working together
- Appointment types scheduled for wrong time of day
- Staff not working as a team
- Not ready to see patients
- Rooms not properly stocked
- Patient arrives late
- Appointment time becomes family conference
- Physician and/or other staff not using time productively
Effective scheduling must be a staff and physician project. Everyone should understand the consequences and the negative patient relations that result from poor time management. Scheduling must be realistic:

- Do you start on time?
- Have you accomplished a time analysis?
- Do you consider the type of appointment (new or established; emergency)?
- Have you considered cluster appointments?
- Do you have a policy that only the patient goes to the treatment room?
- Do you know what your busiest days of the week are?

Is the physician consistently late from surgery?
- Do you consider the type or personality of patient (child vs. elderly vs. adult)?
- Do you allow for emergencies and physician call-back time?
- Do you triage the patient’s need to come in?
- If you schedule new patient appointments over the phone, do you mail a patient brochure, welcome letter, and appointment card? Do you direct patients to your practice website so they have the information they need in advance?
- Do you have written protocol on when to interrupt the physician?
- Are the treatment rooms set up consistently?
- Are the rooms fully supplied at all times with medical supplies and forms?
• Is there effective use of nurse practitioner, physician assistant, or physician extender?
• Is there a written office policy on managed care patients that require referrals prior to treatment, and is it followed?
• Do you allow enough time for surgeries, hospital rounds, meetings, and travel time?
• Do you have prepared materials or pre-printed instructions for frequent and common questions your patients might have, or do you have that information available on the practice website?

How to Handle Wait Times

• No matter how efficient you may be, there will be times when your patients or others will have to wait. Some suggestions for those times:
  – Inform patients when they arrive approximately how long the wait may be.
  – Apologize to the patients; let them know that you realize their time is valuable.
  – Offer the opportunity to reschedule the appointment
  – Consider calling patient in advance to advise that the office is running late.
  – Consider allowing patient to leave with a time given to return; provide a beeper to call the patient back in.
  – Have current magazines for the different interests of those waiting.
• Ask patients when scheduling appointments if you may call to remind them and what number you can reach them at.
• Have music or television on
• Have a DVD player with informational DVDs
• Validate parking ticket
• Consider having an aquarium
• Request that the providers inform you of on-call schedules, information about out-of-office appointments that could conflict with the office schedule if they were delayed.
• If you relocate patients to a treatment room, inform them of any additional wait time and check in with them occasionally, offer a magazine, etc. Do not put a patient in a treatment room and expect him or her not to think of it as additional waiting (wasted) time.
• Patients who have excessive wait times, more than 30 minutes, are more likely to sue. Always remember, a clean and attractive facility with a friendly staff that keeps the patient informed will go far in maintaining good patient relations.
**Time-specified Scheduling**

- Scheduling appointments at a specific time
- Keeps a steady flow of patients
- There should be time to accommodate for urgent visits
  - **Goal:** To minimize the wait time for the patient

**Wave Scheduling**

- 3 to 4 patients are scheduled every half hour
- They are seen in the order that they arrive
- Waiting time is often shorter
  - **Goal:** To always have patients waiting to be seen and arrive in “waves”
Double Booking

Giving two patients the same appointment time slot

Can be used when one patient is undergoing a procedure

• Goal: To allow for patients with an injury or severe illness to be seen even with a full schedule.

Open Booking

Giving patients a timeframe for when they should come in

They are seen in the order they arrive

Some practices have walk-in hours before regular office hours

This works best for practices that are not busy

• Goal: To allow for patients with injury or serious illness to be seen ahead of other patients.
Clustering

Scheduling patients with similar conditions into groups

These groups are seen on specific days and/or times

• Goal: To treat patients with similar conditions on the same day.

Multiple Offices

Appointments can either be scheduled in a central system or at each office

It is important to know which office the patient wants to go to

If paper charts are being used, it may be necessary to transport them from office to office

• Goal: To make sure patients are scheduled at the appropriate office.
ENGAGE PATIENTS BEFORE APPOINTMENT

Financial Policy Goals

You are showing them that you are not only concerned with their personal health, but also their financial health.
Sample Financial Policy

The providers and staff at the _______ Group feel that we can better serve your healthcare needs if you are familiar with the following policies and procedures of the group:

OFFICE HOURS: The _______ Group is open Monday through Friday from 8:00 a.m. to 5:00 p.m. Providers are available on an emergency basis at any time.

APPOINTMENTS: Appointments may be made by calling (555) 555-5454 during our office hours. Appointments may be requested with the provider of your choice. Every effort will be made to provide the earliest possible attention for the convenience of the patient. Due to the unscheduled nature of emergencies imposed upon the providers, occasional delays do occur. We hope that you will understand that these delays are unavoidable. If you are unable to keep your appointment, please cancel as far in advance as possible. Some other patient who can be booked into the open time will be grateful for your thoughtfulness. **If you do not cancel your appointment at least 24 hours before, or if you no-show, we will assess you a $25 missed appointment fee.**

PAYMENT FOR SERVICES: Patients are requested to pay at the time the service is rendered. In our contract with insurance carriers, we are required to collect a co-pay for your visit with the provider, therefore, we will be collecting your co-pay prior to your visit. We will accept cash, check, or credit card. Returned checks will incur a $30.00 service charge. **In order to participate in protecting your medical identify, we do ask for a copy of a health insurance card, Driver’s License (ID card) upon check-in.**

Payment will include any unmet deductible, co-insurance, co-payment amount, or non-covered charges from your insurance company. If you do not carry insurance, payment in full is expected at the time of your visit.
However, if this is not possible, a copy of your account charges will be provided the day of your visit. Payment of your account is expected within 10 days of receipt of charges. In the event that timely payment cannot be made, special and specific arrangements may be made by calling our Patient Accounts Department at (555) 555-2455. We will be most understanding and willing to accommodate unusual circumstances.

You are directly responsible for any unpaid balance on your account with us. You will receive a statement each month, even if insurance payment is pending. The medical information necessary for insurance claim forms is provided as a courtesy to you.

The _______ Group cannot accept responsibility for collecting your claim or negotiating a settlement on a disputed claim since we are not a party to your insurance contract.

Any special arrangements between patient and provider for payment of your account must be presented directly to the patient Accounts Department.

After 90 days, if no payments have been received and no extended payment arrangements have been made, necessary collection proceedings will begin.

It is important that you notify us of any changes of address promptly since undeliverable statements are turned over to collection agencies immediately.

In accidents, legal cases, etc. in which an insurance company or other party is presumed liable for your expenses incurred as a result of your accident or illness, the _______ Group looks to the party receiving the services for payment and cannot be expected to wait for the conclusion of long-term court cases or the settlement of disputed insurance claims before being paid. The party receiving such services is normally expected to take care of his/her account in line with the above credit guidelines.
INSURANCE CLAIMS: If you have indemnity insurance, which will pay for services rendered at the _______ Group, it is our policy to provide to you, without charge, a statement with all the information needed by your insurance company. You should forward this statement together with your insurance claim form, filling out the patient part only, directly to your insurance company. It must be understood, however, that financial responsibility for the account rests with the patient. Insurance claims on services performed must be requested by the patient. You will be responsible for any deductible at time of service.

*Caution: If your insurance covers services rendered in the _______ Group, it is your responsibility to request an itemized statement from our insurance department covering these services. If you have filed an insurance claim and no payment or rejection notice has been received within 60 days from the date of filing, we encourage you to:

A. contact your insurance company as to the reason for delay.
B. make regular payments on your account to keep it in good standing. Any overpayment will be refunded in the event that the insurance pays directly to the _______ Group.

DIVORCED PARENTS OF PATIENTS: By signing below, the adult who signs a minor child into our practice on the day of service accepts responsibility for payment. This office does not promise to send bills or records to the other parent/guardian for issues of payment or communication. We will communicate about treatment and payment with the parent who signs in that day. Parents are responsible between themselves to communicate with each other about the treatment and payment issues.

FORM FEES: There will be a $10.00 fee charged to complete forms. The following list includes, but is not limited to: disability, FMLA, loan, cancer policy, supplemental insurance policy & daycare forms. Payments must be made prior to the completion of the forms. The office will have 10 business days in which to complete forms before making them available for patient to pick up.
EMERGENCIES: Call our phone number, (555) 555-5454, at any time. A provider is available on call to meet emergency needs. New patients making their first visit to the group are requested to arrive 15 minutes before their scheduled appointment for the purpose of registration.

COMPLAINTS: It is our sincerest desire that you will have no occasion to register a concern, but if that occasion should arise, please call any of the providers or the clinic administrator at (555) 555-5454. Your constructive criticism is encouraged at all times to assist us in improving service to our patients.

I have read and understand the practice’s financial policy and I agree to be bound by its terms. I also understand and agree that such terms may be amended by the practice from time to time.

____________________________
Signature of Patient (or Guarantor, if applicable) Date

Please print name of patient

LEAD YOUR TEAM TO A “WIN-WIN”
Team Tips For Effective Appointment Scheduling

Start on time for office appointments.

Staff should be advised far in advance when delays develop.

Follow written appointment scheduling instructions and triage criteria for defining appointments.

Receive necessary training for scheduling appointments.

Channel all appointments through appointment desk.

All staff should support appointment scheduler when they are following directions.

Avoid interruptions, such as telephone calls, etc., when seeing patients or other scheduled appointments. Put the criteria in writing.

Communicate with patients and others who have arrived for their appointment and must wait.

Personally apologize to patients or others when late and thank them for waiting.

Daily “team huddles”
Team Tips For Effective Appointment Scheduling

Improve patient connections with email or text advance check-in
Kiosk check-in
Informing patients of wait times
Track “no-show” reasons ($$, transportation, did not remember)
Review and resolve as a team - patient complaints/suggestions

Tips, Tools & Techniques

Create a culture where “patient satisfaction” is real and sincere
Select the appointment scheduling technique that best fits your office
Properly train staff on how to handle patient wait times with respect
Make successful patient scheduling a “team effort”
Questions?

Thank you for your attendance!

Get your questions answered on PMI's Discussion Forum:
http://www.pmimd.com/pmiForums/rules.asp