Slide 1

The Magic of Scheduling Patients

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Slide 2

Objectives

- Be cautious attempting a cookie-cutter approach
- The purpose of scheduling patients
- Appointment types
- Why schedule training is important
- What does a good schedule look like
- Medical versus Vision exams
- Building flexibility into the schedule
- How revenue is impacted by scheduling patients
- How to gain staff buy-in when scheduling patients
- Maximizing revenue with scheduling patients
- Revenue, Resources, and Responsible Patient Care

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Slide 3

What is the purpose of scheduling patients?

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Slide 4

The purpose of scheduling patients

- They need to be seen!!!
- For efficient use of time
  - The cost of staff
  - Providers time
- Efficient use of staff
  - Putting the right people in the right place
  - Cross-training and staff utilization
- Efficient use of resources
  - Equipment, space, personnel, locations

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Slide 5
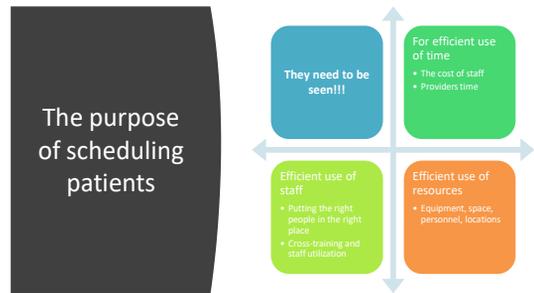
Heartbeat of the Practice

- A planned schedule
  - Monitor new growth
- Full Eye Exams
  - Drives testing
  - 16 per day ($1M)
  - 18 per day ($1.5M)
  - 20 per day ($2.0M)
- Know your recall system! (Solution Reach)
- No-shows need to be tracked!
- Billing
  - Closing the charts

Would you still go out if you could see it?

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Slide 6

Appointment Types

- Routine*
- Medical* Not glasses
- Vision
- Comprehensive
- New (3 years)
- Established
- Testing
- Follow-up
  - Short
  - Long

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Why are appointment types important?

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Routine*

Paton folds

Appointments based on unknown conditions and patient's chief complaints

There is truly no such thing as a "**routine patient**" until they have been seen by the provider

Retinochoroid Vessels

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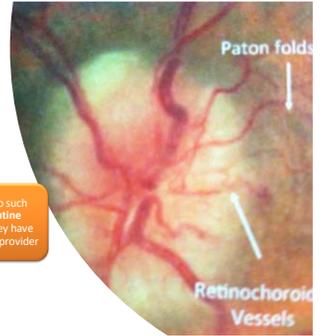
Medical

- When the patient has a known condition an is being treated.

- Ocular conditions
- Diseases of the body

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Vision

Correction of vision

Spectacle

Contact Lenses
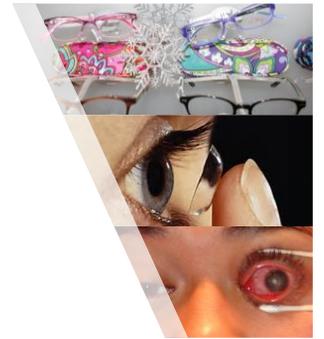
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Comprehensive

An exam that meets the criteria

Adult

Child

Medical VS Vision
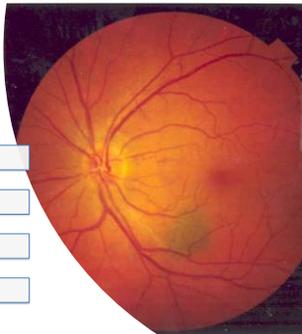
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New Patient vs Est

- Patient that has not been:
  - Seen in the same practice
  - Under the same tax ID
  - By the same specialty

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Testing/Contact Lens Patients
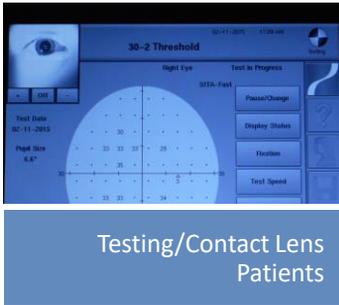
- OCT
- VF
- Retinal Photography
- Dry eye evaluations

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Slide 14

Why training is important

- The entire staff needs to understand the scheduling concept
- Consistency is necessary to track revenue

Good Morning — Rise and Shine

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Slide 15

30 Min		30 Min	
Comp		Comp	
Est	Est	Est	Est

Clinical and optical earnings are tied up in this process!

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Slide 16

What makes a good schedule

- Why am I working so hard and not seeing the revenue?
- Create a schedule that works, one that you can stick to it
- Adequate resourcing
- How much milk fits into a 16oz glass?

Medical versus Vision Exams

- Medical (**not glasses or contacts**)
  - OCT
  - VF
  - ERG
  - Specular microscopy
  - Disease management or discovery
  - Complications with contacts (ulcers)
- Vision (**glasses and contacts**)*
  - Capture rate
  - OPTOS (self-pay)
- Contact Lenses
  - Initial fit
  - Annual sales

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Slide 17

Building flexibility into the schedule

- Don't stress yourself or your staff out in the process
- How will you catch up once you get behind?
- How do you get your staff to lunch and home on time

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Slide 18

How to gain staff buy-in when scheduling patients

- Training
- Monthly Reporting
- Reward System
- Provider Capability
- Staff Capabilities
- Minimizes chaos if done properly
- Keeping the schedule filled

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Maximizing revenue with scheduling patients

- Two tracks
  - Those you have to see
  - Those you need to see

- Managing follow-ups
  - Spread them out

- Monitoring
- **Constant rescheduling of pts is a serious waste of revenue**

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Calculating Work-Flow

- Resources
  - Personnel
    - Providers
    - Front desk
    - Screening techs
    - Opticians
    - Providers
    - Testing

  - Available technology
  - Available space
    - Screening rooms
    - Exam rooms
    - Space in optical

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Pay Per Schedule Appt Type

- Insurance payers
- High paying insurers
- Cash pay
- Explanation of Benefits
- Authorizations
- Timeline for collection by ins carrier

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Insurance Requirements

- Authorizations
- Pre-authorizations
- Checklist:
  - Who needs an auth
  - How to get an auth
  - Verifying an auth has been received
  - Auditing day-to-day
  - Staff Reporting
  - Emergency visits protocols

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Exam Requirements

- Standardize
- Multiple providers
- Adult vs Children
- Testing

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Necessary Resources Requirements

- Capable EMR

- Room capacity

- Provider capacity

- Staff capacity

- Facility capacity

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Compliance Requirements

- **HIPAA**
- Meaningful Use
- PQRS
- MIPS
- MACRA
- CMS Discrimination notification
- Emergency Numbers posted

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Patient Appointment Notification

- When to verify
- What to verify
  - Insurance
  - Copay
  - Appointment
    - Date
    - Time
    - Patient is coming
- How to confirm it was done
- How to handle a no-show

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Pre-Appoint vs Recall

- Pre-appoints have a scheduled appoint
- A recall card says "It's time to schedule your appointment"
- Full Exams 1 year plus 1 week out to make sure insurance issues are resolved
- Appointment cards
- Confirmation card completed by the patient in their handwriting
- Caution solely depending on autocalls

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No-Show Rate

- You need to monitor your no-show rate weekly and monthly
- Understand and know your process for tracking no-shows
- Whenever you change part of the process, re-verify your process
- What is causing the no-show rate?
- Have a great no-show policy, post it

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Check-in Director of First Impressions

Verify appt	Verify patient with photo ID	Verify Insurance	Practice HIPAA	Notify staff patient is ready
Current info for every visit	Authorisation is for what we are seeing the patient for **Co-pay is collected**		Watch your volume Explain NOPP Have patient sign Privacy Statement Ensure family and emergency contacts	

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Checkout – Director of Lasting Impressions

- Additional fees collected
- Set up referrals and **tracking**
- Schedule next appointment
- Ask the patients to go on-line and comment about their experience

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Optical Capture Rate

- 16 comps per day
- 12 buying glasses in optical
- Average sale
- Number of multiple sales
- Progressive lens
- AR
- Blue Light
- Computer glasses
- National average: 67%
- **Desired goal 75%**

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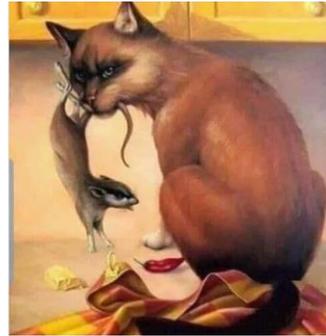
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Must Remember Tracking

- Profit

- Growth

- Efficiency

- Return On Investment
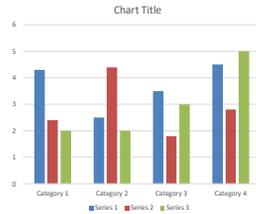
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Thank You

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