Front Office Success and Scheduling Strategies

JOY L GIBB, ABOC
EYESOFJOY@YAHOO.COM

1

Introduction

► How important is the front office?
  ► Typically first contact point
  ► Sets the mood and tone of the office
  ► Is a hub of activity
  ► Well versed and adaptable team members

2

First Impressions

► Look at your waiting area through the patient's eyes
  ► Cleanliness
    ► Who is responsible?
    ► How often?
  ► Seating
    ► Is it clean and in good repair?
    ► Is it user friendly?

3

First Impressions

- Involving the senses
  - What do you see?
  - What do you hear?
  - What do you smell?

4

First Impressions

- Education
  - Front office team members may need to be the most well educated people on your team

5

Telephone Skills

- Answering Etiquette
  - Within the first two rings
  - Smile
  - Greeting
  - Do you know them? Do they know you?

6

Telephone Skills

- Triage the call
- Do they know where you're located?
- What are their preferences?

7

Scheduling Challenges and Solutions

- Define type of appointment and length
- Match patient needs with available appointments
  - Day or time
  - First available
- Cancellation List

8

Scheduling Challenges and Solutions

- Do you have an appointment map?
  - Long vs Short
  - New vs Established
  - Testing
  - Family Appointments

9

Scheduling Challenges and Solutions

- Staying on time
- Be forthright with delays
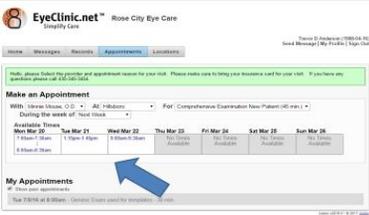 - Give them options

10

- 38% OF ALL APPOINTMENTS ARE BOOKED AFTER HOURS.
- IT TAKES 8.1 AVERAGE MINUTES TO SCHEDULE AN APPOINTMENT.
- BY 2019, 64% OF PATIENTS WILL SCHEDULE APPOINTMENTS DIGITALLY.
- 63% OF THE TIMES, AGENTS TRANSFER PATIENT CALLS.
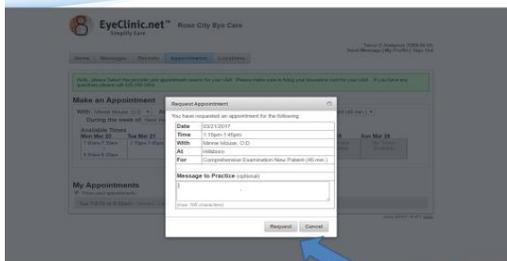- BY 2019, 80% OF APPOINTMENT VOLUME WILL BE SELF-SCHEDULED.

11

Online Scheduling

- Patient can access offices online scheduler 24-7 and actually see open appointments
- Patient selected appointments typically puts patients choice on "hold" for office approval and once approved patient is notified by text, email or patient portal
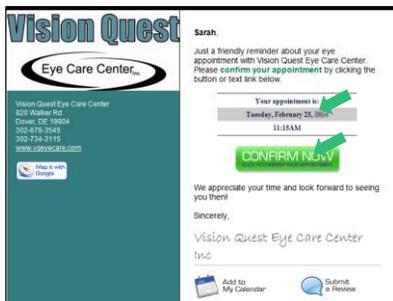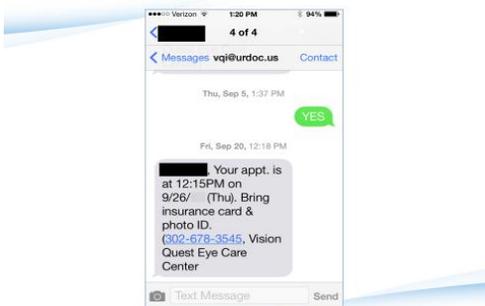- Let's see how it looks …

12

13

14

15

16

17

18

Appointment Reminders

- Automated appointment reminder systems can make your office extremely efficient
- Benefits of automation:
  - All patients can be sent multiple reminders of their upcoming appointment in numerous ways
  - Patients can easily reply to confirm they are coming to appointment with a simple click or "yes" reply
- The Best part… **This process can happen entirely automatically with no staff intervention**

19

20

21

Confirmations/Conversations

▶ Some programs have the ability to instant chat with patients if they need to reschedule or have questions

22

Conversations
SR Conversations
More than Two Way Texting-
Seamless, Contextual, Intelligent Chatting
from your existing office phone number!

23

Reducing Check In Time and Frustrations

▶ Start gathering information
  ▶ Can be done prior to appointment
    ▶ Online demographics and medical history update
  ▶ Verify benefits for exam and materials prior to appointment
  ▶ Gather ALL insurance information
  ▶ Make sure patients know when to arrive and what to bring with them!
▶ Once patient arrives …

24

Reducing Check In Time and Frustrations

- Insurance
  - Patient responsibility
  - Insurance liaison

25

Effective Patient Communication

- Explaining insurance benefits
  - Prior to the appointment
  - During the appointment
- Reminder call/emails/texts
- Patient information
  - Don't reinvent the wheel

26

Conclusion

- Front office team members are crucial to the success and image of your practice!

27

Thank you for attending!

eyesofjoy@yahoo.com

28