Effectively Scheduling Appointments

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I n order to effectively schedule appointments with patients in a medical practice, one must build a solid foundation first. Establishing standard operating procedures (SOPs), policies, and consistent templates for each provider will ensure that appointments are scheduled appropriately. This article will review the 5 key steps that are necessary to effectively schedule appointments.

Step 1: Building Templates for Successfully Scheduling Appointments

If a template is currently in place, it should be reviewed to make sure that it is set up for success. Are all of the providers in the medical practice scheduled appropriately so they can stay on schedule? If cosmetic dermatology services are offered, are these mixed in with the general dermatology appointments for the day? Setting up a template for success ensures that new patients, cosmetic dermatology patients, and patients who require full-body checks are not scheduled on top of each other. Overlapping appointments slow down efficiency and put the provider behind schedule very quickly.

Two key items that should be factored into the schedule should be the number of no-shows that the medical practice averages and the number of emergency patients who are scheduled on a daily basis. If the medical practice averages 3 to 5 no-shows per provider and 2 to 3 emergency patients per day, these should be built into the template.

Once the template has been set up appropriately, make sure it stays that way. To ensure consistency with templates, appoint one key team member to be in charge of the templates. The key team member's responsibility is to ensure that each provider's schedule is running effectively. The key team member should review each template on a daily basis and look ahead to proactively prevent any future scheduling problems, as well as be the only one

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who can approve any changes to the template. Most software scheduling programs allow access code levels to be given to employees based on their position within the company. Using this feature in a software scheduling program will greatly reduce scheduling errors.

Step 2: Establishing SOPs for Scheduling Appointments

After the master templates are in place, what is the SOP for scheduling appointments? In order to ensure that each appointment is scheduled accurately, the medical practice must develop an SOP for scheduling appointments. All the steps that are required by the medical practice to schedule appointments should be clearly spelled out and listed in numerical order. This ensures that all team members involved in scheduling appointments, such as those in the reception area or triage department, are scheduling appointments consistently and in the same manner. Providing a list of steps also allows someone who may be filling in for a team member to successfully schedule appointments by following the steps listed in the SOP.

Once a medical practice has established an SOP for scheduling an appointment, an appointment binder should be developed that includes the SOP, the templates for each provider, and the standard greeting for the medical practice. The first 2 items were touched on in the previous section. The standard greeting for the medical practice is what the reception area or triage department should say when they answer the phone and greet a patient. The most important items that need to be mentioned in the greeting are the name of the medical practice as well as the name of the person receiving the incoming call from a patient. Also, it is very important to speak slowly, softly, and with a smile. This ensures that the patient calling understands what is being said and has a positive first impression of the medical practice.

Step 3: Confirming Appointments

Once the appointments are made, are they being confirmed? Confirming appointments reduces a medical practice's no-show rate and allows for less scheduling errors. The medical practice should establish a detailed SOP for confirming appointments with patients. Items

to consider when calling a patient to confirm an appointment should include providing directions to the medical practice, information on the medical practice, and advising the patient on what they will need to bring with them to their appointment. If a patient has a copay, let them know what it is in advance and that they are expected to pay it on the day of their appointment. If the medical practice has a Web site, are patients able to download new patient forms and information? If so, let patients know this when their appointment is confirmed. The more information provided to a patient in advance, the better their overall experience will be. The medical practice will also benefit from the improved efficiency as a result of implementing an SOP for confirming appointments.

Most medical practices confirm appointments 24 hours in advance. This is not ideal for 2 reasons. First, there is a high likelihood that a patient will not receive or check the message prior to their appointment. Second, even if they do receive the message, they may receive it after work hours and will not be able to contact the office directly to reschedule their appointment if necessary. This creates more missed appointments the following day when their message to reschedule or cancel is retrieved. To prevent these 2 things from happening, implement at least a 48-hour confirmation policy. This ensures that patients are called at least 2 days in advance of their scheduled appointment time and allows them adequate time to call to reschedule. Again, this creates a positive experience for the patient and reduces the no-show rate for the medical practice.

Step 4: Establishing a No-Show Policy

Does the medical practice experience a lot of no-shows throughout the day? To reduce the number of no-shows, a medical practice has to establish a no-show policy that must be enforced. A no-show policy should be an SOP that every medical practice has and implements consistently every time a patient does not show up. An example of a standard no-show policy is detailed below.

A standard no-show policy should give a patient the opportunity to miss an appointment 3 times. The first time a patient misses their appointment, send them a postcard that acknowledges this and make a note in their chart as well. The second time a patient misses an appointment, send them a letter stating that this is their second no-show and if they miss another appointment they will be blocked from being seen. Make sure this documentation is in their patient chart and on file as

well. If the patient decides to miss an appointment for the third time, they have clearly demonstrated that they do not respect the medical practice. A letter should be sent from the general manager or administrative staff that notifies the patient that they have been blocked from being seen at that particular medical practice. Included in the letter should be an outline of the 3 appointments that they missed and the dates that the notifying documents were sent to them. Keep all of these documents on file and in the patient chart as well.[1]

Implementing a no-show policy like the one previously described will reduce the number of no-shows a medical practice has, as well as keep patients away who do not respect the medical practice's policies.

Step 5: Communicating Schedule Changes

Lastly, communication is paramount to effectively schedule patients. Any changes in the schedule need to be communicated immediately to the receptionist or triage department. Steps 1 through 4 can be followed to perfection, but if step 5, communicating schedule changes, falls short, everything else will suffer as a result. In order to prevent this from happening in a medical practice, an SOP for communicating schedule changes should be in place. There should be one key person in charge of communicating schedule changes who is responsible for maintaining the master templates. This key person should proactively check each provider's master template daily and look ahead to forecast any potential scheduling errors. As they find errors or changes that need to be made, they should be communicating these directly to the receptionist or triage department, as well as to the provider whose schedule is affected.

Summary

In conclusion, effectively scheduling patients requires 5 key steps, including building templates for successful scheduling, implementing SOPs for scheduling appointments and confirming appointments, establishing a policy for no-shows, and communicating any schedule changes. Establishing these 5 key steps and using them consistently will ensure that a medical practice schedules patients appropriately. In return, these steps will enhance the overall efficiency of a medical practice and increase the patient's satisfaction level with the medical practice.

Reference

1. Practice Solutions. http://www.solutionsforpractices.com. Accessed September 24, 2008.