Health Information Compliance Alert

Patient Engagement: Boost Patient Success With These Scheduling Insights

Tip: Keep HIPAA on the front burner as you set up protocols.

Not only can informed and efficient scheduling eliminate stress and headaches in the office, but it can also increase patient satisfaction and boost practice morale.

"You really want to try and go that extra mile for your patients,” said **Marcy Garuccio, CPC, CPMA, CANPC**, Fellow, ACS-AN, during a session at AAPC HEALTHCON 2021.

Consider the First Impression

A patient's first experience of a practice may be a website, but the interactions involved in scheduling an appointment will really set the tone for their visit and form their opinion of the office as a whole.

Think about your phone system and website: are they organized in a way that is very "to the point” and easily accessible for patients? For example, if you have a phone system, consider designing it so the patient pushes 1 for scheduling or questions about an appointment, 2 to speak to a nurse, 3 for billing, etc., Garuccio says.

Build Your Policies on These Basics

You may want to consider prioritizing scheduling referrals, as they can be the life of a practice, Garuccio says. Craft a policy with providers and, if applicable, shareholders, that applies to the whole office for referral scheduling.

Include these basics in your patient-scheduling policies: aim for a mix of payors and an even flow; schedule daily blocks to accommodate emergency appointments; pay attention to trends like patient insurance carrier, cancelations, and the kinds of encounters that drive your practice, she says.

Then decide and communicate to staff which team members or roles are authorized to perform certain actions:

- Who can schedule patients?
- Who can treat which patients?
- What are the nitty-gritty details on incident-to and how it plays out in your practice?
- Who can refill prescriptions?

Do patients seeking refills need to be seen in the office or can the provider call or e-prescribe?

Don't forget to communicate these policies to everyone involved, from practitioners and managers to additional clinical and administrative staff. It's also a good idea to review the HIPAA Privacy Rule and how those provisions might impact scheduling via the phone or by text to safeguard your patients' protected health information (PHI).

Keep Providers in the Loop

The whole point of scheduling is making time for patients to see providers. It's crucial to make sure providers are kept in the loop, and that everyone is on the same page about when the provider will be in the office and how they can best use that time.

Blocking off time can be important to allow for better workflows, but make sure you establish policies and protocols that specify who arranges the blocked off time. The organizer should utilize technical tools and block the free time for when providers aren't seeing patients. More importantly, the policies and protocols should be consistently applied to all staff - including the most senior clinicians.

When parts of the schedule are blocked off, especially at the last minute or without sufficient warning, staff can get overwhelmed. Blocking off time on the schedule can increase calls to patients and even push some service dates outside of range of authorization. If providers block off schedules excessively, it can reflect poorly on a practice, as providers - or the whole office - can even develop a reputation among patients for constantly rescheduling or being unavailable, Garuccio says.

Invest Time in a Template

"Put in the time early on to make a template for scheduling, to save time down the line," Garuccio says.

Your template should be detailed and specific, so your scheduler knows what rules to abide by and what information to collect. When creating the tools, include the what, when, where, length of visit, and whether any kind of authorization is required.

Build confirmation into the scheduling template, too. Staff and patients should agree that the date, place, and time are correct, and that staff advise patients of any pertinent office policies, like last-minute cancellations or no-shows upfront.

If the patient shows up at the wrong office (if your organization has multiple locations) or the wrong time, make sure your staff know what to do - your practice should have a policy and maybe even a script to address such a situation.

Tip: As you build your template, ensure that it is HIPAA compliant. Additionally, ensure your staff understand how to use the template properly and in a way that protects patients' data from being seen by other patients when scheduling in office.

Identify Wiggle Room

One action that can take your scheduling to the next level is educating your scheduling staff on which visits are less time-intensive. Learning where to identify wiggle room in the calendar can help you squeeze in more patients, either out of necessity on a crazy day or as office policy to provide a buffer for expected cancellations.

Doctors and other providers should designate which services or visits qualify as fodder for wiggle room, possibly even on an individual basis. Doctor A may think a recheck is quick, but nurse practitioner B may want to spend a little more time evaluating a patient in that situation.

Attend to Patient Comfort

If you work for a practice that offers services that require a patient to have a full bladder, such as an ob-gyn or urology practice, make sure you're thinking about the patient's comfort, Garucccio says. Don't stack appointments in such a way that someone will be extremely uncomfortable physically while waiting to see the provider; make sure the provider will be able to see such a patient as soon as they arrive.