

Scheduling for Profitability

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1 hour course

DESCRIPTION:

The schedule is one of the heart beats of your practice. It is vital to have a system that everyone in the office understands. Are you incorporating all the resources available to you in and getting your established patients back when you want to see them and getting new patients in within a timely manner? How well you schedule will determine your growth from year to year in your practice.

LEARNING OBJECTIVES:

1. The doctor is the one who should be setting a goal for how many exams they want to see a day and how they want them scheduled each hour.
2. How pre-appointing your schedule when done effectively gets your patients back in when the doctor wants to see them.
3. The importance of sticking with your template when you schedule patients and how to execute it smoothly.

INTRODUCTION

The schedule is one of the heart beats of your practice. It is vital to have a system that everyone in the office understands. We all make appointments in our offices when that is not our primary job and if we don't schedule patients on a regular basis it is confusing where to put a patient. Therefore they get put in a spot that does not have enough time for them and subsequently running other patients late for their appointment. That is why it is important to have a template in place customized for your doctor in the time increments he/she wants.

- I. Getting the Doctor's Input **10 Min.**
 - A. Set down with each doctor to see what their goal is for number of full exams per day.
 - B. Establish a time the doctor wants to begin seeing patients.
 - C. Establish the time the doctor wants to see the last patient for the day.
 - D. Mark off time for the doctor's lunch.
 - E. When this is decided then you are ready to begin your template on your appointment scheduler. Most software programs allow you to color code and set up specific times for each appointment type and it will only allow that type appointment to be scheduled at that time therefore avoiding mistakes and helping you stay with the goal amount of exams.
- II. Setting up your template **5 Min.**
 - A. Sample template below for seeing 16 full exams a day.

- B. On this template it is very easy for staff to know that on the even hours and the 30 minutes will always be a full exam.
- C. This is a sample but every doctor has an idea of how he would like to see patient scheduled that works best for them.

III. Office Visits **5 Min.**

- A. Office visits can be medical checks, glaucoma checks, dry eye work-ups contact lens recheck or prescription RX recheck.
- B. Make sure you are specific on the template why the patient is coming.
- C. Each type office visit requires a different time allotment, and you don't want these appointments to get behind schedule.

IV. Pre-Appointing **15 Min.**

- A. Doctor-Tell the patient during the exam when you want them to return.
- B. Staff-Make the next two appointments the doctor has scheduled for the patient. For example: VF, photos, and then their yearly exam.
- C. Give the patient an appointment card for each appointment you have made for them.
- D. One Month Before Appointment -Set your Patient Management System to contact the patient notifying them of their appointment to get a confirmation or a request to reschedule. This should have a date, and a statement that they need to call our office to confirm their appointment within the next 48 hours.
- E. Three weeks out send another electronic notification on your Patient Management System for the patient to confirm or a request to reschedule.
- F. Two weeks Before their appointment pull up your schedule and call all patients that are not confirm. Make multiple attempts to confirm with the patient at different times during the day. Notify them if they have not confirmed in 48 hours their appointment may be or will be cancelled.
- G. One week before their appointment if a patient has not responded to any of the messages they have received, cancel or double book the appointment
- H. The day before the appointment gives the confirmed patients a reminder call about their upcoming appointment the next day.

V. Executing the Schedule **10 Min.**

- A. Make sure all the patients that are not confirmed are double booked or canceled to give you the best chance of reaching your goals.
- B. Do a study after you have been working your template a month and see what your average no show rate is for the month and you can make adjustments and add in some extra exams if needed to reach your goals.
- C. Let the doctor make the decision where to add the additional exams. This needs to be a team effort to make this work.

- D. When patients arrive for their appointment be clear with the check-in staff how much time they have to get the patient's records ready and have them ready to go to pre-test.
- E. Do periodic studies on the above to make sure they are staying on time because this sets the pace for their whole visit. If they start out late it is hard to get caught up without making them feel rushed through one of the areas in the office.

VI. Patient Management Systems

10 Min

- A. There are multiple companies that will work in conjunction with your staff to help with contacting your patients.
- B. These companies use multiple ways of communication. If you have the information in the computer they will text, e-mail and some companies will even make phone calls for you.
- C. This does not replace totally staff involvement it just gives staff tools that minimize the phone calls they have to make which makes the practice more efficient.
- D. The Recall is the part of this system that seems to get dropped. These are the patients that have not been seen in over a year. Those are the patients that can become a liability for the practice if they are not managed properly.
- E. These companies use the latest technology to help you with this part of the system. The tracking part of these programs give you all the information on the patients with current appointments along with the patients they have contacted from your pre-appoint and recall list.

CONCLUSION

5 Min.

To be successful it will take some planning and a team of people to make this system work. The reward is reaching your practice goals for exams. The benefit for the patient is to have the appropriate amount of time with the doctor without unnecessary waiting. You stay in control of this process from start to finish. Utilize every tool you have to make your practice more efficient which means more profitable. It is a win-win system when a good system becomes a habit.

SAMPLE SCHEDULE TEMPLATE

8:00	Exam	1:00	Exam
8:15	Exam	1:15	Exam
8:30	Exam	1:30	Exam
8:45	OV	1:45	OV
9:00	Exam	2:00	Exam
9:15	Exam	2:15	Exam
9:30	Exam	2:30	Exam
9:45	OV	2:45	OV
10:00	Exam	3:00	Exam
10:15	Exam	3:15	Exam
10:30	Exam	3:30	Exam
10:45	OV	3:45	OV
11:00	Exam	4:00	Exam
11:15	Exam	4:15	Exam
11:30	Exam	4:30	Exam
11:45	OV	4:45	OV
12:00	Lunch	5:00	
12:15	Lunch		
12:30	Lunch		
12:45	Lunch		