

## Course Description

Discover ways to incorporate the best practices for onboarding patients and improving satisfaction in your offices. These national best practices related to office role transparency, patient communication and developing brand loyalty have been employed to enhance patient satisfaction and improve performance on Consumer Assessment of Healthcare Providers and Systems (CAHPS), Health Outcomes Survey (HOS) and Healthcare Effectiveness Data and Information Set (HEDIS). Continue the journey to becoming a 5-Star practice!

## Purpose

Front-line medical office staff is the welcoming face of all medical groups. Ensuring patient satisfaction with care, access and knowledge about the practice promotes empowerment, improved outcomes and patient loyalty. The course will cover implementing best practices to empower patients and improve medical practice loyalty.

## Learning Objectives

By the end of the session, participants will be able to:

- Identify best practices that could be assimilated into their office settings.
- Recognize the different approaches for communication with patients at various ages.
- Recognize the influence member satisfaction has on medical group surveys.
- Better assist members with understanding their benefits.

## Target Audience

- Licensed vocational nurses
- Medical assistants
- Office managers
- Registered nurses
- Other administrative personnel

## Training Time and Set Up

- Set up: 15 to 30 minutes
- Training: 40 to 50 minutes

## Required Materials

- Class notes
- Evaluation form
- Handouts/tip sheets
- Ice breaker toolkit
- Interactive activities
- Sign-in sheet
- Slide deck
- Treats (such as candy) **Optional**

## Expected Outcome

At the end of this training session, the staff will be able to improve patient satisfaction, communication and brand loyalty by implementing best practices for onboarding new patients.

## Discussion Prompts

- **Share an experience.** If you've had an experience with a new patient who didn't understand his or her benefits, how did you handle the situation and what was the outcome?
- **Share an experience.** How do you manage patient flow when short staffed and keep best practices in place?
- **Consider changes.** What types of changes could you make to improve satisfaction that would ensure new patients are welcomed and onboarded appropriately?
- **On the "Future Slide."** What do each of these future statements mean to you and your office?

## Interactive Techniques

**Stand up/sit down (or raise hands).** Ask participants to stand/raise their hand if they have ever had to welcome and onboard a new patient, assist a patient with understanding his or her benefits or fill in for an office role they don't usually perform. Ask how they felt in each of these situations.

**The toolbox.** The toolbox provides the trainer with items that can be used to develop ice breakers or develop interactive activities. These "tools" should be used to get a class started and get people engaged. The contents of the toolbox may include:

- Candy
- Legos
- Little soft balls
- Pads
- Pens
- Pipe cleaners
- Play-Doh
- Red and green cards