



New Patient Onboarding

Office Staff Training



Onboarding Objectives

- ▶ Understand the importance of onboarding new patients
- ▶ Discuss how onboarding impacts the medical group practice
- ▶ Define the roles of office staff
- ▶ Recognize the influence patient satisfaction has on medical group surveys
- ▶ Identify best practices

What Is Onboarding?

- ▶ The process of welcoming a new patient
- ▶ The opportunity to get a new patient on the early path to quality care
- ▶ Well onboarded
 - I trust my doctor
 - I understand where to get care
 - I understand my coverage
 - I am WITH SCAN
- ▶ Poorly onboarded
 - I'm confused about my coverage
 - Where do I go to get care?
 - I don't know my doctor

Who Is Responsible for Onboarding?

- A. The medical group
- B. The PCP
- C. Health plan
- D. All of the above

Why Is Connecting with the PCP Important?

- ▶ Members who see their PCP have better care.
- ▶ Members who don't see their PCP have poorer health outcomes.
- ▶ Connecting with care improves 5-Star outcomes
 - Preventive screenings
 - Preventable hospitalizations
 - Reduced readmissions
 - Medication adherence

Office Staff Characteristics and Roles

► Roles

- Welcome to office (check in)
- Appointments
- Follow-up
- Referral expert
- Problem solver
- Communication with patients and practice
- Checkout

► Characteristics

- High-performing
- Organized
- Efficient processes
- Manage office flow
- Timely communication
- Excel at customer service
- Knows impact of CAHPS questions

Best Practices for Patient Satisfaction

- ▶ Welcome the patient first
 - Prepare packets for new patients
 - Orientation programs, welcome letters
 - High-touch introduction

Best Practices for Patient Satisfaction

▶ Patient-centered care

- Customized care and outreach
- PCP welcome appointment within six months
- Identify the need/reason patients are there
- Every patient is special

Best Practices for Patient Satisfaction

▶ Personal identifiers

- Have the patients' pictures on file
- Use key social information to make patients feel you
- remember them
- Cultural awareness and social determinants of health

Best Practices for Patient Satisfaction

▶ The dreaded packet

- Who fills it out? Is there assistance?
- Font size, no yellow highlighters, pre-populated forms and information
- Use of tablets or mobile computers

Best Practices for Patient Satisfaction

▶ Office behavior

- Smile and introduce yourself
- Know your job and the office
- Communicate clearly and be of assistance

Best Practices for Patient Satisfaction

- ▶ Office policies and procedures
 - Explain office flow
 - Appointments, check in/out, insurance forms, lab requests, pharmacy, after-visit summary
 - Medication reconciliation
 - Specialist referrals

Best Practices for Patient Satisfaction

- ▶ Outside resources
 - SCAN members should be referred to Member Services for assistance
 - Transportation, pharmacy, Medicare information
 - Community programs
- ▶ Staying in touch
 - Annual wellness visits
 - Birthday cards
 - Appointment reminders
 - Newsletters

Understanding CAHPS

▶ What is CAHPS?

- Consumer Assessment of Healthcare Providers and Systems

▶ What is the definition?

- CAHPS is a survey that asks consumers and patients to report and evaluate their experiences with healthcare

▶ What is the focus?

- Consumers assess communication skills of providers, ease of access, wait times, etc.

CAHPS Questions

- ▶ In the last six months, how often did you and your personal doctor talk about all the prescription medicines you were taking?
 - Never, sometimes, usually, always
- ▶ Wait time includes time spent in the waiting room and exam room. In the last six months, how often did you see the person you came to see within 15 minutes of your appointment time?
 - Never, sometimes, usually, always

CAHPS Measurements

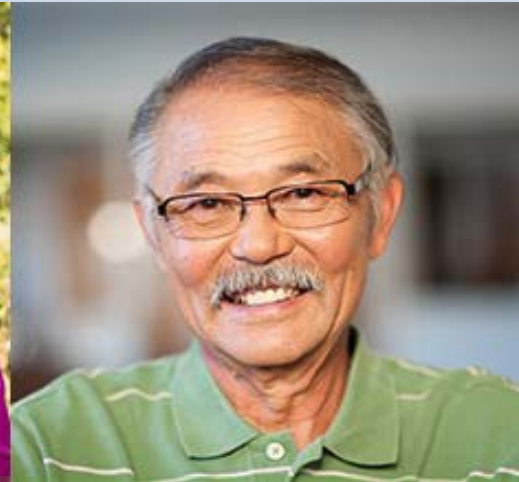
▶ Patient experience

- Provider and staff
- Health issues
- Appointments
- Tests, Tx, labs
- Healthcare plan
- Specialists
- Medical records
- Office procedures

Future State for Patient

- ▶ Supported and confident
- ▶ Empowered
- ▶ Understanding what to do
- ▶ Feeling listened to
- ▶ Receiving hands-on action
- ▶ Creating personal relationships
- ▶ Thriving
- ▶ Streamlined care with easy access

You always make me feel **special!**



Empathy: The Human Connection to Patient Care

“Could a greater miracle take place

https://www.youtube.com/results?search_query=cleveland+clinic+empathy

Empathy: Looking through their eyes.



<https://www.youtube.com/watch?v=ovHcr1tOpBs>