Patient Onboarding
Best Practices

Definition

Onboarding is the process by which patients are welcomed and oriented into a provider's practice. Introducing new patients to the office procedures and systems helps them navigate the office and healthcare experience.

When a patient receives good onboarding, the following occurs:

- The patient connects with the doctor and staff and is more likely to follow his or her treatment plan. The patient is also not afraid to ask questions and feels comfortable with everyone providing care for him or her.

- The patient understands how to navigate the system and is more likely to keep his or her appointments and receive the necessary treatments.

- The patient will know who to talk to about his or her coverage and/or payments.

- The patient is more likely to have better healthcare outcomes, which decreases emergency room visits and hospitalizations.

- The patient will see that everyone in the office values him or her.

Welcome the Patient First!

- Always use a title and last name when requested: "Welcome, Mrs. Jones."

- Do not forget to smile and to look the patient in the eye.

- Ask essential questions and provide the necessary paperwork to establish the patient's history:

    - "I see you're here today for your annual wellness visit. Do you have any questions you'd like to ask the doctor?"

    - "Welcome to your first visit with our practice. I have a packet of information for you that we will review together."

Identify the Patient's Interests or Needs

- Do *not* ask "How are you feeling?"

- Establish the relationship between patient and staff.

- Make sure you identify the need and reason for the patient's visit.

Patient Recognition

What steps do you have in place to remember each patient?

- Photo in chart

- Special information about the patient's personal life (pets, grandchildren, work)

"The Packet" (Patient Forms)

- Who fills it out? Make sure the patient has something to write with.

- Is the font large enough for the patient to read?

- Are the spaces big enough for writing?

- Is there staff available to assist the patient with the paperwork?

- Are any areas pre-loaded with patient information that will save time and decrease first-day stress?

- Are areas highlighted or are font colors used that senior patients will have difficulty reading?

- Does the office use tablets or mobile computers instead of paper?

- Does the office provide online documents or mail these documents prior to the first appointment so the patient can review and fill them out in advance?

Be sure to include a map to your office and other important locations that can help the patient if needed. This map should provide information about the office location, pharmacy, labs, radiology, billing, urgent care, emergency assistance, etc. If these services aren't provided in the same location, provide contact numbers, addresses and directions to these locations with your office as the starting point.

When reviewing "the packet" with the patient, be sure to discuss his or her insurance coverage so that the patient understands how much he or she will pay for services.

Onboarding Support Tools

- Onboarding toolkit:

    - Provides draft welcome letters, guidelines for welcome materials, sample surveys, etc.

    - Some other ways to stay in touch and customize care include: invitations to patient programs, patient newsletters, handwritten birthday cards and call or email reminders about upcoming visits/appointments.

    - Available at **SCAN's Provider Portal** under the "Membership" tab.

- Additionally, there are vendors available to support your practice with patient onboarding. Contact askthetrainer@scanhealthplan.com for more information.