New Patient Onboarding

Onboarding Objectives

Understand the importance of onboarding new patients.

Discuss how onboarding impacts the medical group practice.
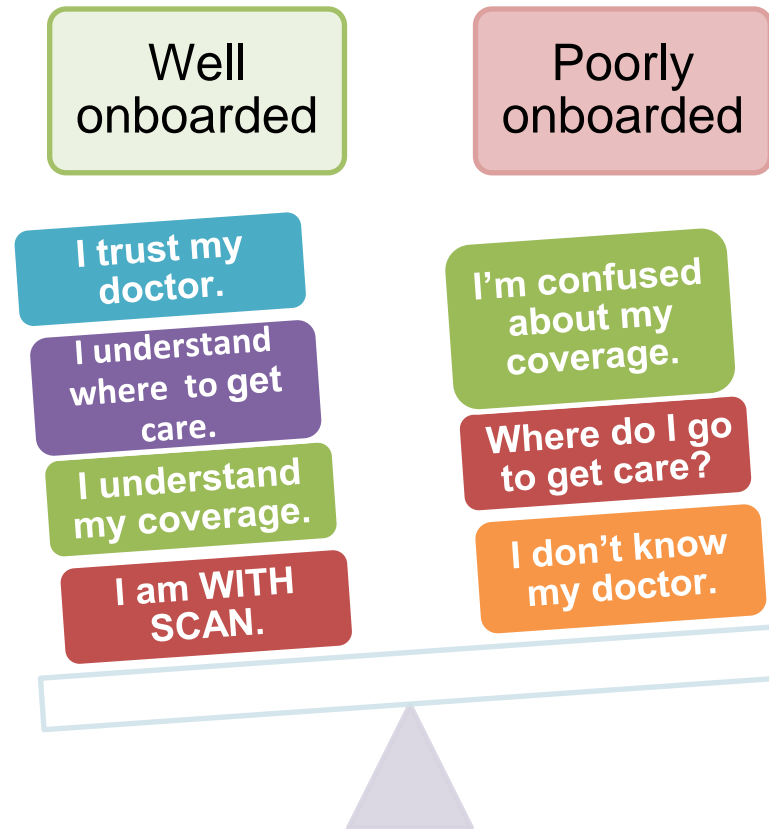
Define the role of the office staff.

Recognize the influence patient satisfaction has on medical group surveys.

Identify best practices.

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What Is Onboarding?

- The process of welcoming a new patient
- The opportunity to get a new patient on the early path to quality care

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 are not always healthy.

- Connecting with care helps 5-Star:
  - Preventive screenings
  - Preventable hospitalizations
  - Readmissions
  - Medication adherence

Source: SCAN Cohort Analysis 2014

Front Office

Characteristics

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

Roles

- Welcome to office (check-in)
- Appointments
- Follow-up
- Referrals
- Communication with patients and practice
- Check out

Front Office or Back Office

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Back Office

Characteristics

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

Roles

- Welcome to office (check-in)
- Appointments
- Follow-up
- Referrals
- Communication with patients and practice
- Check out

Patient Satisfaction Influencers

- Welcome the patient first!
- Patient interest or need
- What do you have in place to remember each person?
- "THE PACKET"
- Office behavior

"The Dreaded Packet"

Who fills it out?

Do you have staff to assist the patient with paperwork?

Is the font large enough?

Is the space big enough for writing?

Are any areas pre-loaded with patient information?

Are areas highlighted in colors other than **yellow** for seniors?

Do you have a tablet or mobile computer?

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What is CAHPS?

Consumer Assessment of Healthcare Providers and Systems

- Surveys ask consumers and patients to report on and evaluate their experiences with healthcare.

- Cover topics that are important to consumers.

- Focus on aspects of quality that consumers are best qualified to assess:

  - **Communication skills of providers**

  - **Ease of access to healthcare services**

  - **Wait times for appointments or in the exam room**

CAHPS Questions

❖ 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

❖ 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

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

Best Practices

Providers

High Touch Introduction

- **New patient letters**
- **New patient programs**
- **Picture on file**
- **Key social/ family info for welcome**

Customized Care and Outreach

- **PCP welcome appointment within 6 months**
- **Use key social info to make a patient feel that you remember them**

Staying in Touch

- **Annual wellness visit**
- **Birthday call/ letter with reminder for AWV**

Onboarding Resources

SCAN Onboarding Toolkit

- Draft welcome letters, guidelines for welcome materials, sample surveys, etc.
- Available at SCAN's Provider Portal
  - Under "Membership" tab. Zip file https://providerportal.scanhealthplan.com/SHD_/

Vendors to Support Onboarding

- Censeo Health - http://www.censeohealth.com/
- Advance Health - http://www.advancehealth.com/

Reference link: https://www.youtube.com/watch?v=cDDWvj_q-o8