

Tips to Help Improve the Patient Office Visit Experience

What to Keep At Top of Mind

We believe members who have positive experiences are more likely to follow medical advice and treatment plans from their care provider. That's why we've included a few best practices reminders for you to consider.

Prior to the Member Visit

- Ensure that you have appointments available according to the standards found in the care provider manual. Allow daily schedules to incorporate urgent visits each day.
- Engage the entire practice team staff in supporting patients. Schedule staff meetings and ensure that team members know their role with the patient. Set an expectation for a friendly, courteous environment.



Office Visit Reception – Best Practices

- Try to answer phone calls promptly, if a patient needs to be put on hold, inform them and try not to have them on hold for more than one minute.
- When scheduling a patient appointment, aim to offer the soonest available appointments.
- Collect patient clinical information and patient experience data before the visit. Provide forms digitally or by mail to the patient. Inform the patient that forms need to be completed prior to their scheduled appointment. This will allow you to use your time more efficiently.
- Have the schedulers/or the automated reminder calls inform the patient to bring in their completed forms, medications, a list of other health care providers including dates and visit summaries.
- Greet patients warmly. Continually inform them of wait time and any unexpected delays in being seen.

During the Visit – Physician Engagement

- Inquire on patient's goals to improve their health.
- Review the labs or procedures that were ordered with the patient.
- Review records to avoid misstatements and ensure medical records are up to date.
- Incorporate other treatment services (e.g. vaccine during a single visit). Set follow up visits as appropriate.
- Avoid interrupting the patient or rushing them. Take time to explain the objectives for the visit, including treatments and procedures and why it's necessary.
- Don't use medical terminology, use simple language. Ask if the patient understands the recommended treatment, procedure or tests results. You can ask the patient to explain it back to you in their own words to assess their understanding.
- When prescribing medication, explain the reason for taking medication and discuss potential side effects of the medications. Discuss other options such as generic, over-the-counter and natural alternatives.
- At conclusion of visit, ask if the patient has any questions. Ask the patient if they agree to the medication and treatment plan.

Post-Visit – Office Staff Engagement

- Offer to help make the follow up appointment and provide a referral printout (if applicable).
- Submit prior authorization requests to prevent delay in tests and treatments. Ask the patient to sign an authorization form for medical release of records for other health care providers (if medically necessary).
- Give the patient a handout that provides the locations for lab testing, radiology, procedure and surgery sites and specialty care providers.
- If you're a specialist, ensure that your staff shares consultation visit notes to the patient's Primary Care Provider. Consider an in-office care coordinator to help with patient care management.