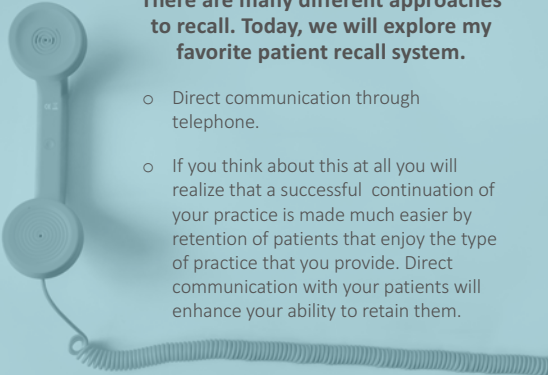




COURSE OBJECTIVES

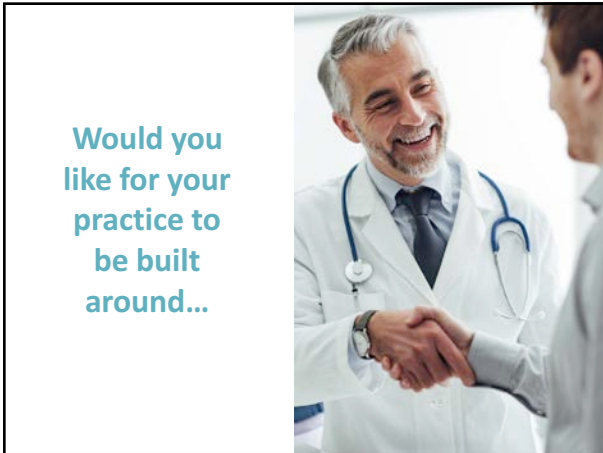
- How to utilize a patient communication coordinator
- Duties of patient communication coordinator, specifically with respect to patient recall.



There are many different approaches to recall. Today, we will explore my favorite patient recall system.

- Direct communication through telephone.
- If you think about this at all you will realize that a successful continuation of your practice is made much easier by retention of patients that enjoy the type of practice that you provide. Direct communication with your patients will enhance your ability to retain them.

YOU WILL NOTICE THAT I DIDN'T SAY A RETENTION OF **ALL** PATIENTS BUT THE RETENTION OF **SPECIFIC** PATIENTS.



Patients that appreciate your attention to detail?

Patients that appreciate your knowledge in a particular area?

Patients that want to see you because of who you are, and what you do, and not because of something that you sell?

<p>Any good patient communication system begins when the patient enters the front door of your office and is greeted by your staff.</p>	<p>As the patient progresses through the examination process, your technicians and doctor become critical advocates for the return of patients to your office.</p>
<p>Remember, the patient's image of your office is many times formed in the first four minutes.</p>	<p>It is absolutely essential that the doctor discusses all of the reasons that the patient should return to your office at any particular time and do so with a technician.</p>
<p>Information is obtained relative to their demographics; specifically contact information and information regarding other family members.</p>	<p>This will increase the ability of the technician to pre-appoint future visits.</p>

Pre-Appointments

- In our practice we have found that we are able to pre-appoint a visit occurring six months or sooner nearly 100% of the time.
- Pre-appointment of patients at one year is a more complex issue and its success is many times relative to the reason for visit.
- In our office our patient recall system is essential to the continued viability of our practice.

What do we actually hope to accomplish with our patient recall and communication system?


A PRACTICE HOPES TO ACCOMPLISH AT LEAST FOUR THINGS:

<p>1</p> <p>Better ongoing vision care for our patients.</p>	<p>2</p> <p>Creation of a pre-appointment safety net.</p>
<p>4</p> <p>Monitoring the health of your practice; i.e. are your patients choosing to seek care elsewhere due to a poor experience?</p>	<p>3</p> <p>Increase the positive response of patients to a consistent communication system.</p>

What are the **minimum parameters** needed for **patient recall**?

In our office we use:

- Patient's demographics
- Patient's insurance eligibility
- Patient's account balance
- Last examination date
- Their last office visit and reason for that visit
- Today's recall reason
- Time of day, where and how the patient prefers to be contacted





Prepare your staff to do recall

Make sure that your Patient Communication Coordinator has a thorough understanding of their responsibilities.

RESPONSIBILITIES INCLUDE:

- Knowing all of the doctors schedules helps expedite filling any cancelled or rescheduled appointments
- Creating the recall lists
- Schedule Appointments
- Propagate statistical analysis spreadsheets
- Notify pre-appointed patients 4 weeks in advance by email, text or phone, send letters if necessary

RESPONSIBILITIES INCLUDE:

- Keep track of ongoing recall statistics:
 - Total recalls made
 - Attempts made to reach the patient
 - Number of patients reached
 - Number of appointments scheduled
 - Success rate
- Track the number of patients who have moved out of the area and whether or not they wish to remain active
- Track the number of patients who have switched to another doctor

Mechanics of a well functioning telephone recall system:

1

We pay close attention to the age of the patient that we are attempting to schedule. If the patient is a child, always talk to a parent (preferably the child's mother)

2

Do not leave messages with children. The parent rarely gets the message and you look foolish for leaving it.

3

If you are calling to schedule an adult, try to speak directly with the person. It is much less effective to talk to a spouse; although, sometimes it is unavoidable.

Mechanics of a well functioning telephone recall system:

4

If attempting to reach a patient at work, do not leave messages with co-workers (CAN YOU SAY HIPPA VIOLATION?!); call back at a more convenient time.

5

We attempt to reach each patient five times by phone. On the fifth attempt, we leave a message if we are unsuccessful in speaking to the patient.

6

We only send letters when the telephone number we have on file is disconnected or we have a wrong number.

Examination Scripts

You may write a better script than I have, or our friends at Williams Group may assist you in writing scripts.

Whatever you do:

Do not try this without a script!



"Hello, this is _____ with Dr. Cockrell's office.

When Dr. _____ examined you last (exam date), he/she recommended that you be seen again this (month) to re-evaluate your eye health and vision performance. I am calling to help you schedule the appointment.

Dr. _____'s first available appointment is _____. Would that appointment be convenient for you?"

If so, schedule the appointment. If not, go to the next available appointment.



Taking this approach is very helpful in keeping your schedule working for you instead of ambling aimlessly through time.

Try this a couple of times before asking the patient when they would like to schedule. Otherwise, you will spread your appointments all over the place and defeat your goal of being busy as much of the time as possible.

Additional Recall Scripts

"Hello, this is _____ with Dr. Cockrell's office. When Dr. _____ examined you last (exam date), he/she recommended that you be seen again this (month) to re-evaluate your (glaucoma, cataract, retina, or diabetes)(Try to always have a reason). I am calling to help you schedule the appointment. Dr. _____'s first available appointment is _____. Would that appointment be convenient for you?"

Contact Lens Follow-up Script

"Hello, this is _____ with Dr. Cockrell's. When Dr. _____ examined you last (exam date), he/she recommended that you be seen again in 6 months to re-evaluate the health of your eyes and the fit of your contact lenses prior to ordering your next supply of lenses. You may recall that this visit is included in the cost of your contact lenses. I am calling to help you schedule the appointment. Dr. _____'s first available appointment is _____. Would that appointment be convenient for you?"



Always try to pre-appoint:

It should be easier due to being a time frame less than 6 months.

You may sell mostly annual supplies and schedule to see the patient again in one year, BUT you lose several opportunities to help your patient.

Glaucoma, Cataract, Retinal and Diabetes Recall Scripts...

“Hello, this is _____ with Dr. Cockrell’s office. When Dr. _____ examined you last (exam date), he/she recommended that you be seen again this (month) to evaluate the progression of your (glaucoma, cataract, retina, or diabetes). I am calling to help you schedule the appointment. Dr. _____’s first available appointment is _____. Would that appointment be convenient for you?”

One of the best ways to avoid negative responses is to not hesitate after your introductory comments to the patient. You should try to guide the patient directly into the appointment without giving them an option to say “no” or think much about it. At that point, they have already decided to make the appointment and you can move to the day and hour that they would like to schedule the visit.



Common Negative Responses

"I can't afford an appointment right now."

- "Your health insurance may include a vision benefit. We are happy to pre authorize your examination if you would like. You would be responsible for all non-covered services and copays."
- If the patient does not have insurance: "We offer a 15% Time of Service discount."

"I'm too busy right now to schedule an appointment."

- "Is there a more convenient time to reach you?"

"I will call you back. I need to check my schedule."

- "I understand. Please do not hesitate to call me at (phone number). If I do not hear from you in the next few weeks, may we contact you again.?"

"My vision is fine."

- "The Drs. Recommended the evaluation not only to check your vision prescription, but also to examine the overall health of your eyes and performance of your visual system.. Your doctor hopes to detect or prevent problems that may not be affecting your vision presently such as diabetes, glaucoma or high blood pressure."

"I'd like to wait another year before scheduling an appointment."

- "Okay, I will pre-appoint you in a year. If you experience any vision changes or problems between now and then, please do not hesitate to call us."

"I don't want to schedule an appointment at this time."

- "I understand. Should I call you back in 3-6 months to schedule an appointment?"

"I just ordered a new supply of contacts."

- "Don't worry, your contact lens prescription may be fine. However, if your prescription has changed, we will exchange your unopened boxes for those with the new prescription at no additional fee."

"I just got new glasses last month."

- "I hope that your new eyewear is performing well. However, prescription verification is only one part of your examination and it is important to evaluate the health of your eyes as well."

How do you establish a successful personal patient recall program utilizing the telephone?

Your recall communications coordinator should have a working list of all of the potential reasons for contacting the patient to return to your office.



Examples of Patient Recall Reasons:

- A general eye health and vision performance evaluation
- Contact lens evaluation
- Glaucoma evaluation with auxiliary testing
- 1 week contact lens follow up, 1 month contact lens follow up, 3 month contact lens follow up, and 6 month contact lens follow up
- Corneal evaluation
- Keratoconus evaluation
- Progress evaluations with respect to binocular vision anomalies
- Cataract evaluation
- Retinal evaluation
- Diabetes evaluation
- Neurologic evaluation
- Sensory motor evaluation
- Vision therapy evaluation

The Recall Reason...

- Should be established by the doctor in the examination room.
- Should be part of the patient record.
- There are reasons other than recall that make this important; foremost of which is proper coding and billing with respect to third party care.

We Use Multiple Methods To Generate Recall Contacts

- The patients due this month.
- The patients due in the last six months.
- The patients due one year ago.
- The patients due two years ago.
- The patients due 3-5 years ago.

Another Option for Managing Your Patient Contacts:

- The patients due this month
- The patients not able to be contacted are rolled forward three months
- Retain the previous twelve months of recall lists to revisit periodically to make sure that no-one is missed

Perform your recall in a consistent manner so the list will rotate and you will not lose patients to oversight

THANK YOU!



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