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This webinar may be recorded. This webinar presents a sampling of best practices and overviews, generalities, and some laws. This should not be used as legal advice. Itentive recognizes that there is not a “one size fits all” solution for the ideas expressed in this webinar; we invite you to follow up directly with us for more personalized information as it pertains to your specific practice and issues.

Thank you, and enjoy the webinar.
About Us

Our passion is to provide solutions for our healthcare provider partners which help them improve patient care, enhance the patient experience and maintain a financially healthy practice.

Since 2003 we have specialized in NextGen® Healthcare services including:

- Consulting
- Hosting
- Customization
- And productivity tools such as ChartGuard® and RefundManager®
Upcoming Webinars

- The Future of Healthcare Delivery: Telemedicine
  - Wednesday, September 21, 2016

- Also, keep your eyes peeled for any other webinar invites dependent on future regulatory changes
Patient Online Scheduling
Do the Risks outweigh the Rewards?
Introductions

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Patient Online Scheduling

Do the Risks outweigh the Rewards?
Today’s Webinar

• Introduction
• NextGen Patient Portal Scheduling
  ▪ Functionality
  ▪ Advantages/ Disadvantages
  ▪ Client Testimony
• Build Your Own Option
• 3rd Party Scheduling Systems
  ▪ Functionality
  ▪ Advantages/ Disadvantages
  ▪ Client Testimony
• Overall Evaluation of Patient Self-Scheduling
Patient Self-Scheduling

- Patient scheduling is an integral part of daily operations for healthcare professionals and their practice management teams. Traditionally, medical office staff scheduled appointments by communicating with patient over the phone or in-person. However, now many practices are considering another option; patient self-scheduling.

- This methodology would allow the patient to schedule their own appointments through an online portal or software.
Industry Pressure

• Patient engagement initiatives
• Patients are now consumers
  ▪ Satisfaction
  ▪ Convenience
  ▪ Competitive market
• Technological Innovation is expected
NextGen Patient Portal Scheduling
NextGen Patient Portal

• The NextGen Patient Portal is a patient-centered tool that allows for communication between providers and their patients.

• It is a web-based application that allows physicians and patients to share health information remotely in an effort to boost patient engagement.

• Through this healthcare tool patients can perform numerous tasks including the ability to request, book, and cancel appointments.
Requesting an Appointment

There are two different options for a practice to set-up how patients request appointments through the portal:

1. A patient can submit an appointment request by selecting a preferred date and time and then they must wait for a response from the practice with the actual date/time.

2. A patient can book an appointment themselves by finding and selecting an available date and time – Also known as real-time booking.
Generating an Appointment Request

Under the schedule tab, the user can select Request Appointment which will launch the Appointment Request page.

Here the patient will need to fill out the following information:

- Practice
- Provider
- Location
- Type of Appointment
Search Appointment

• To submit an Appointment Request the patient must select the following information:
  - Reason for Appointment
  - Priority
  - Timeframe of appointment
  - Preferred date/time
  - Alternate date/time

• Once the user submits an appointment request they will then have to wait to hear back from the practice

• Submitting an appointment request does not guarantee an actual appointment, the practice must respond to confirm for an appointment to be booked
Booking an Appointment

The user will generate an appointment request the same way we just went over, however instead of submitting it with a preferred date/time they will have the ability to search for an appointment in that preferred timeframe. The patient will click search and the first five available appointments will be shown.
Booking an Appointment

- If there are no appointments available for the date and time selected the user will have to pick a different date and time and search again OR click submit request to have the practice respond.

- Once an appointment is selected the user clicks book appointment and will get a confirmation that it is booked.
If you don’t want patients to have the ability to book appointments on their own and you choose to have requests sent to the staff then they would need to accept the request and notify the patient
Submitted Requests

• An appointment request is submitted and received at the practice through EPM via the Mailbox.

• Double click on the request in the mailbox and you are routed to the schedule using the criteria entered by the patient.

• The scheduler will follow normal standards to schedule the appointment.
Submitted Requests

The practice books and charts to patient record and a response is sent to patient
Accepting an Appointment Request

• The patient receives a notification that the appointment has either been booked or that they have a request in their inbox

• If the appointment has been booked the email will say so and no action is required

• If the patient receives a pending request they will be required to accept it in order for the appointment to be scheduled
Types of Appointment Confirmation

Appointment is booked – A patient can book an appointment themselves by finding and selecting an available date and time, if this method is used confirmation then requires no action.

Appointment is pending – When a patient submits an appointment request by selecting a preferred date/time they must click accept to confirm.
Replying to an Appointment Request

• To reply to an appointment request simply click Reply
• The reason for a new appointment box will launch where you can enter in reasoning for a different appointment date/time and then send
Canceling an Appointment Request

• To cancel a pending appointment request simply go into your inbox, open the pending appointment message, and click Recall Appointment Request

• A confirmation pop-up will ask you if you are sure and you just need to hit Ok
Rescheduling / Canceling a Booked Appointment

- To cancel or reschedule a booked appointment before the appointment date, navigate to your appointments and click either Cancel this Appointment or Reschedule this Appointment. The user will be asked to provide a reason why from a drop down box and then submit.

- The appointment status will then change to Cancelled for either a cancellation or a reschedule.
My Appointments Page

• The My Appointments page, which you can access under the Schedule tab, displays all the patient’s appointments, booked or cancelled.

• From this page you can:
  - Print
  - Book
  - Cancel
  - Reschedule
  - Delete

• The user can also export appointments to your own personal online calendar (Outlook or Apple) by clicking the Export to Calendar link.
## Summary of Functionality

The image shows a screenshot of an appointment management system. The system allows users to view and manage their appointments, including keeping, booking, canceling, and removing them. The interface is user-friendly, with options to filter and sort appointments by status, patient, provider, or practice. Each appointment entry includes details such as the patient name, date, provider, location, and phone number. The system also provides options to cancel or reschedule appointments.
We started with two patient slots per day per provider in order to control and monitor the process. Participation is increasing and once they reach a certain threshold, they will increase the slots. Patient reaction has been positive. As an added benefit, the no show rate for those that self-scheduled is reduced to 2% much lower than those that were scheduled through other methods.

- Kachina Gayton, Lone Star Circle of Care
Advantages

• The patient appointment has been scheduled and notified without a single phone call
• Less time was spent on the part of the practice and the patient
• No time was spent on hold
• The request was not limited to only the practice hours as the patient requested the appointment at their convenience and the practice responded at its convenience
• The entire transaction has a history at the patient level and the practice level eliminating questions or confusion
• No-show rates decreased
Disadvantages

• Improper Scheduling
  ▪ Patients may not understand that different appointment types have different scheduling needs
    • For example: A patient may choose “Annual” as the appointment type when it is really a problem visit

• Overbooking or unforeseen backup
  ▪ The practice staff and provider may not be aware of last minute schedule changes or additions and therefore may not be prepared

• This will not work for new patients. They must be enrolled in the portal to have access.
Build Your Own Options
ENT and Allergy

- ENT and Allergy has over 170 physicians practicing in 40+ office locations in Westchester, Putnam, Orange, Dutchess, Rockland, Nassau and Suffolk counties, New York City and northern/central New Jersey
- The practice sees over 70,000 patients per month
- ENT and Allergy use their own web-based appointment scheduling system to facilitate patient scheduling through their own website by clicking book appointment
- As of January 2nd, 2016 they implemented their own web appointments module for all 170+ providers
- They have successfully scheduled 25,000+ appointments year to date with this new software
Gaining Provider Buy-In

In order to gain physician buy-in by all providers they required the web-based patient self scheduling system to:

- Show only some not all open appointments online
  - In response, they agreed to show 8 available appointment times based on an algorithm which are:
    - 1st in the AM
    - Last in the AM
    - 2 Appointments equidistant between the first and last in the AM, as per availability
    - 1st in the PM
    - Last in the PM
    - 2 Appointments equidistant between the first and last in the PM, as per availability
  - The site then recalibrates once an appointment is booked
The providers also required the scheduling software be:

- **Insurance participation friendly**
  - Meaning a provider can only be selected if they take the patient’s insurance
- **Take into account different appointment durations by provider**
  - So, while some physicians allot 10 minutes for a new patient visit others may set aside 30 minutes
- **Date of Birth verification**
  - Some providers have age restrictions on the patients they treat
  - For example: Dr. Smith may only see patients under the age of 4 years old. So when scheduling if a patient who is 18 tries to schedule with Dr. Smith an error message will appear preventing the appointment from being booked because of the DOB verification.
How It Works – Back End

• This is read-only, it does not write directly to the database, instead ENT and Allergy has a call center working a queue

• It refreshes available appointments in the database every 5 minutes

• So, from the patient perspective they are self-scheduling, however on the backend people are manually scheduling appointments placed in the queue with a tool that has rules built-in to eliminate the possibility of a mistake
  - i.e. scheduling a provider at the wrong location, or scheduling a patient for a provider that doesn’t take their insurance
How it Works – Front End

• Patient makes an appointment through the practice website
• The patient will then get an email saying that their appointment is pending
• Then someone on the backend will see the appointment in the queue and manually enters it into NextGen
• Lastly, the patient is notified their appointment is confirmed
Book an Appointment

From the patient perspective scheduling an appointment would start by visiting the practice’s website and clicking on the book appointment tab.
Book an Appointment

• Once the patient navigates to the Book Appointment tab they will be prompted with a location drop box

• Once a location is selected they will need to click one of the two radio buttons indicating if they are a new or returning patient
Insurance and Physician

• Once the patient’s insurance is selected, the patient has the option to select a physician from another dropdown menu or leave it at the default selection which is “No Preference”

• Also, customized for this practice is an added checkbox for patients experiencing ear related problems
New Patient

If they are a new patient an insurance drop box will appear listing only the types of insurance accepted at the practice.
Established Patient

- If they are a returning patient the insurance dropdown menu does not appear.
- They can then just select the provider they had previously seen or leave it at the default “No Preference” before submitting.
- Also, notice the additional customized option for patients needing allergy shots.
  - This only appears for a follow-up patient.
Choosing An Appointment

Once the user hits submit they will be able to see a provider’s schedule with appointment openings to choose from.
Appointment Management

- Appointments are then managed through QuickDash, an appointments management dashboard, to ensure the uptime of physician appointments.
Why Manual?

• Although the practice has the capability, there were concerns with writing directly to the database which many practices face as they decide to implement online patient scheduling.

• In the end, ENT and Allergy came up with a hybrid of patient online scheduling. They were able to offer patients the convenience of online self-scheduling while also keeping providers and practice management staff happy by still having the actual appointment booking process done manually.
The Results

• ENT and Allergy found that the average phone call to schedule an appointment took 4 minutes and 40 seconds. They identified workflow as a contributing factor for the call time.

• After implementing their own web-based scheduling system they were able to cut phone call times down to 2 minutes and 1 min and 30 seconds to manually book the appointment.

• This takes 1 minute and 10 seconds off of the average phone call duration for patient scheduling saving the practice time and improving efficiency.
Client Experiences

Patient access with the Affordable Care Act is huge, patients need to be able to be seen right away. This web-based patient scheduling was a pivotal strategic move to allow patients to make an appointment in real-time.

We have been very successful and have scheduled 25,000+ appointments year to date with this new software.
3rd Party Scheduling Software
3rd Party Scheduling Software

One 3rd party scheduling software we are aware of is Zocdoc. Zocdoc is an online healthcare scheduling service, providing a healthcare search facility for end users (patients) by integrating information about medical practices and doctors' individual schedules in a central location.

Information taken from zocdoc.com
Scheduling System

• Zocdoc provides a scheduling system on a paid subscription basis for medical personnel

• The scheduling system can be accessed by subscribers both as an online service and via the deployed office calendar software, or integrated with their websites

• Zocdoc also provides a searchable database that shows specialties, range of services, office locations, photographs, personnel educational background and user-submitted reviews

• For each doctor the users are able to review the free slots in the schedule and make appointments for specific time slots

• Zocdoc surfaces inventory in 2 ways, their marketplace (Zocdoc.com) and Instant booking under a practice’s brand (White-label)
This is a searchable database where patient’s who often do not have a provider go to find one. This is a major value-add for practice growth as it facilitates new patient acquisition. The database includes:

- Individual Provider Search Listings
- 24/7 Online Booking
- Custom Zocdoc Profile
  - Includes information such as in-network insurances, the procedures you offer, and your real-time availability
- Multiple practice locations can be listed
- Patient Reviews
Zocdoc White-Label Solution

- The Zocdoc white-label solution operates through the practice’s website keeping the practice logo and brand front and center.
- It’s biggest value-add is allowing existing patients better access to scheduling.
- New patients can also book an appointment through the practice website if they travel directly there versus the Zocdoc marketplace.
We have provided an example of the monthly reports Zocdoc provides to physician practices summarizing their performance. Zocdoc describes itself as an inventory management tool that works to lower no-show and cancellation rates for an efficient ROI.
Zocdoc Integration

• Zocdoc will synchronize with your existing practice management solution

• Integration with NextGen
  ▪ A NextGen interface currently exists today

• Integration with your practice website
Zocdoc Results

- Improves patient access
- Improves new patient acquisition
- Enhances online reputation

Information taken from zocdoc.com
Client Experience With Zocdoc

We are doing about 1,000 appointments per month with Zocdoc and we have about 55 doctors out of 180 on the platform.

Zocdoc is great for their search engine optimization and user base who are already using the product. Zocdoc is another great way to attract new patients to your practice.
InQuicker

• Online, self-scheduling and discharge scheduling solutions that support provider strategies around:
  ▪ Patient acquisition and retention
  ▪ Patient experience and satisfaction
  ▪ Care coordination and management
  ▪ Efficiency and load balancing

• InQuicker enables patients to self-schedule into your system via your website and search engines, or to schedule at discharge after visiting your facility

Information taken from inquicker.com
InQuicker Features

- **Two ways to operationalize:**
  - Provides the option to choose between an integrated or non-integrated approach. With integrated it would feed directly into your EHR and practice management software.

- **“Powered By” Branding:**
  - Use a white-label approach to place the practice brand front and center, creating a seamless patient experience that resembles a retail—like guest checkout.

- **Self-scheduling and discharge scheduling functionality:**
  - InQuicker enables patients to self-schedule into your system via your website and search engines, or to schedule at discharge after visiting your facility.

- **A search engine-optimized platform:**
  - InQuicker landing pages are built for optimal search engine rankings.

- **Detailed reporting:**
  - This reporting provides insights into patient volume, new patient mix, patient satisfaction and important demographic information.

*Information taken from inquicker.com*
InQuicker Scheduling

• Two-click scheduling for office visits
• InQuicker’s patient-centric, online self-scheduling solution supports satisfaction with:
  ▪ Convenience and control through 24/7 access to care: InQuicker increases the number of hours patients have to access to care from 40 to 168 hours per week
  ▪ Satisfaction by minimizing wait times: Patients who use InQuicker average 90% patient satisfaction scores

Information taken from inquicker.com
Patient Online Scheduling

Location: Columbus, OH
Insurance: Blue Cross Blue Shield PPO

Primary Care:
- Family Medicine
- Internal Medicine
- OB/GYN
- Pediatrics
- Nurse Midwifery
- Breastfeeding Medicine

Specialty Services:
- Specialty Care
- Colonoscopy

Appointment Type: Office Visit

Appointment Times:
- Today:
  - 12:00 pm
  - 12:10 pm
  - 12:20 pm
  - 12:30 pm
  - 12:40 pm

Appointment Times:
- Tomorrow and Thursday

In order to ensure you receive the right type of care, please take 2 minutes to answer the following series of questions.

This appointment is for existing IHA primary care patients only. Do you already have an IHA primary care physician?

- Yes
- No

ITENTIVE Healthcare Solutions
Other Customizable Options

- InQuicker allows clients to customize the set-up of their website and patient workflow for booking an appointment.

- This client chose to distinguish between a new and existing patient right away and then used a pop-up for an insurance notice.
Patient Forms

• InQuicker offers the option to include and customize patient forms for your practice when patients are scheduling an appointment.

• For example, on IHA’s website when a patient selects a physician and appointment time they are then prompted to fill out visit information and patient information.
Reporting and Analytics

• A reporting dashboard that provides insights into patient volume, new patient mix, patient satisfaction and important demographic information

• Patient data matched all the way to revenue through revenue cycle management (RCM) integrations. This functionality positions you to see the downstream financial impact patients who use InQuicker have on your bottom line

• Digital marketing-based, origin analytics, so that you can see who your patients are, how they’re finding you and what behaviors they’re exhibiting once they do

• Monthly reports, to provide insight into product utilization and support tracking of ROI

Information taken from inquicker.com
Non-Integrated Approach

• On the front end of the process, your Practice Manager blocks times for self-scheduled patients

• Once a prospective patient schedules via InQuicker, the person on your team responsible for scheduling receives a notification via fax, email, text, phone, pager or browser pop-up information

• The notification directs them to the InQuicker console, where prospective patient information – including status, notes and contact information – can be found. Note: If the notification is faxed, information is included in the secure document, which means logging into the InQuicker console isn’t necessary

• Your representative enters the information into your patient registration system, so that when the patient arrives, you’re prepared for them

Information taken from inquicker.com
Integrated Approach

• The appointment automatically populates into your EHR or practice management system in real time

• Appointment mapping recognizes the appointment types that are associated with each slot in your system and shows them within the scheduling solution

• Real-time checks assure appointment slots are still available, making double-bookings impossible

• Patient record checks attempt to match the patient’s demographic data with existing patient records in your system. If a match is found, the existing patient record is placed into the appointment. If no match is found, a new patient record is generated

• If a prospective patient cancels an appointment, it can be marked ‘canceled’ in most systems

Information taken from inquicker.com
Customization Options for Integrated Approach

- Schedule availability
- Appointment types and durations
- Accepted insurance plans
- Screening questions
- Practice and provider information
- Instructions upon arrival
- Link to additional paperwork
Integration Benefits

Provider benefits associated with an integrated approach include:

• No special planning needed
  ▪ Because schedules stay synced, there is no need for special planning for InQuicker appointments or estimated treatment times

• Operational efficiency
  ▪ Your staff doesn’t need to hold specific InQuicker times – openings on your schedule automatically populate, minimizing paper workarounds by clinical staff

• Appointment and estimated treatment time accuracy
  ▪ Because your schedule automatically updates, the times shown online are accurate, and our Real-Time Check automatically prevents double-booking

• Greater patient choice
  ▪ Because integration allows for more available times to be shown to patients, they are provided more choices and more likely to find a time that fits their schedule

Information taken from inquicker.com
Who InQuicker is Integrated With

- They can provide clients using these products a “guest check out experience” to improve patient access for new and existing patients without logging into a portal (for existing patients).
- If you use NextGen, they can implement a 2-way communication solution that will show available appointments live and allow any patient to easily book without having to do a login process.

Information taken from inquicker.com
IHA Case Study

• IHA, a not-for-profit, multi-specialty medical group located in southeast Michigan, wanted to make the most of 2015’s open enrollment period. A key part of the group’s strategy was to strengthen its online presence to encourage both the acquisition of new patients and retention of existing patients.

• IHA made the decision to implement the InQuicker digital self-scheduling solution with 200 providers across 30 of its practices. IHA choose to implement Bi-directional integration with the provider group’s NextGen EHR platform.

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<tr>
<th>The Results</th>
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<tr>
<td>Between IHA’s soft launch at the end of September 2015 and end-of-the-month October 2015:</td>
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<tr>
<td>604</td>
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<tr>
<td>appointments were scheduled via InQuicker.</td>
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Overall Evaluation of Patient Self-Scheduling
Current State of Self-Scheduling

Accenture published two studies in which they found:

- 77% of patients prioritized booking, changing and canceling appointments online as important
- Patients spend an average of 8.1 minutes scheduling an appointment and 63% of the times their calls are transferred
The Future of Self-Scheduling

Accenture also predicted that by 2019:

• 66% of health systems will offer self-scheduling
• 64% of patients will use self-scheduling
• 2 out of 3 health systems will adopt tools to book appointments online
• 38% of appointments will be self-scheduled, which is about 986 million appointments creating $3.2 billion in value
Benefits

• Build patient loyalty
• Increase rebooking
• Improve attendance
• High reimbursements
• Online presence
• Maximize your availability
• Strengthen your reputation
• Be available 24/7
• Get verified reviews
Challenges to Self-Scheduling

- Patient privacy concerns
- Job security concerns
- Conflict over buying or building
- IT requirements
- Scheduling concerns
10 Reasons Why You Should

1. It’s What Patients Want
2. Online Scheduling’s Future Valued in the Billions
3. Practices Can Hone A Competitive Edge
4. Younger Demographic Prefers It
5. Online Scheduling Reduces Strain on Office Staff
6. New Patients Will Seek It Out
7. Online Scheduling Keeps Waiting Rooms Full
8. It Reduces No-Shows
9. People Dislike Talking on the Phone
10. Demand is There Now
Uncertain Where Your Practice Stands?

Let Itentive help:

• By assessing your current readiness
• Providing recommendations
• Implementation of new processes and procedures
Next Steps

• Visit us Itentive.com
• Sign-up for our informative webinars and blog
• Consider our 3-day, fixed price on-site consultations:
  ▪ Clinical Workflow
  ▪ Revenue Cycle and Front Office
  ▪ Technology and Performance
• Test Drive our Products
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Thank you