

Front Desk Strategies

Workbook Reference: [Section 4](#)

Administrative staff have a crucial role to play in a successful Advanced Access environment and using the following strategies will help.

Strategy	Tips
Offer Appointment on Day of Choice <ul style="list-style-type: none"> Patients should be able to book an appointment for today, or the day of their choice, at the time that they call and by the modality they prefer When we ask people to phone back, we create a process called “Access by Denial”. This deflects demand and creates additional waits and delay in the system 	<p>Do not ask patients to call back for an appointment, or limit their ability to pre-book an appointment.</p> <p>Move away from a system where patients need to plead their case to be seen. Aim to offer an appointment for today with the patient’s provider, regardless of the reason for the visit. The first question the scheduler asks is not what is your medical problem? But who is your primary care provider? Also consider asking if they are open to a virtual appointment.</p> <p>Use a reminder system to prompt appointment scheduling closer to the time of the appointment for patients who require an appointment that is longer than three to four months out, for physiological or other reasons.</p>
Strategic Scheduling <ul style="list-style-type: none"> Offer same day appointments; book same-day virtual videoconference appointments later in the day Schedule pre-booked appointments later in the week and earlier in the day - determined by supply/demand (book early, book late) Guide patient to open slots you want to fill first 	<p>Track demand data to understand the pattern of appointment requests (daily and weekly demand) and where to guide pre-booked appointments.</p> <p>Schedule pre-booked appointment first thing in the morning. Fill morning appointments before offering afternoon appointments.</p> <p>Scheduling virtual videoconference appointments later in the day provides time to send the invite link and for the patient to download and test any necessary applications.</p> <p>If late in the afternoon and same day appointments are filled, it is an option to offer an appointment tomorrow. Do not tell the patient to call back (access by denial).</p>
Managing vs. Guarding <ul style="list-style-type: none"> Do today’s work today. Protecting appointments creates backlog Route patients to the appropriate provider Try looking at weekly schedule vs. daily schedule Know your patients 	<p>Do not hold appointments because you feel something more urgent will come up. Knowing your daily demand will assist in these circumstances.</p> <p>Is it necessary for the patient to see the physician or is it appropriate that they be seen by someone else on the care team?</p> <p>Review the weekly schedule to give you a view of what is to come. Is there anything you can move forward (e.g.: for a cancelled physical you can have the option to use for a same day appointment or bring another appointment forward).</p> <p>e.g.: When a patient who routinely brings family members along calls for an appointment, ask them if they require more than 1 appointment.</p>
Truth in Scheduling	Know your daily demand. Know what constitutes a long and short appointment

<ul style="list-style-type: none"> • Data collection is key to understanding the demand and supply of the practice • Know your capacity and organize your supply to meet your demand • Reduce appointment types to reduced queues 	<p>Communicate with provider regarding their schedule (e.g. if provider is going to arrive at 9:30, then appointments need to begin at 9:30 not 9:00)</p> <p>Have you allowed sufficient time for the reason for the appointment?</p> <p>Once the patient has been offered an appointment, ask patient the reason for their appointment so you can schedule appropriately</p> <p>Can you max-pack the appointment? (use health prompts/alerts)</p> <p>Commit to measuring your demand (daily/weekly/panel size) at regular intervals. Things change over time and this may be an indication to update your scheduling processes.</p>
<p>Communication Strategies</p> <ul style="list-style-type: none"> • Patients may be surprised and unprepared for a same day appointment when you first get started. Scripting is not used for triage, but rather for routing patients to alternate providers wherever possible. 	<p>Use scripting to help schedulers talk with patient about advanced access scheduling. Messages need to be simple and clear.</p> <p>e.g.: <i>Dr. Quality can see you today (tomorrow) at 10:30 or 1:15. Do either of these times work for you?</i></p> <p>e.g.: <i>Dr. Quality is out of the office and will be returning in four days. I can make an appointment for you when the doctor returns.</i></p>
<p>Reduce No Shows</p> <ul style="list-style-type: none"> • When a patient does not show for an appointment or arrives late, the result is lost provider supply 	<p>Reduce backlog to avoid booking appointments too far into the future</p> <p>Prompt the patient to call you if unable to keep the appointment. “Your appointment with Dr. X is on Monday June 20th at 1:00pm. You will give us a call if you are unable to keep that appointment won’t you?”</p> <p>If a patient does not show for a virtual appointment, consider calling them within the first few minutes to check if they are having issues logging on.</p> <p>Identify the patients who frequently do not show for their appointments and develop strategies to increase likelihood that they will keep their appointment.</p>
<p>Manage Late Arrivals</p> <ul style="list-style-type: none"> • Be prepared for late arrivals and how to manage them. Remember that providers often keep their patients waiting. 	<p>Use a signal to let the provider know that a patient is late and have high priority work available for them to do while waiting.</p> <p>When possible work the late patient into the schedule to avoid deflecting demand to the future.</p>
<p>Be Prepared- Planned Prepared Visit</p> <ul style="list-style-type: none"> • Staff at the front desk have a key role to play in contributing to a planned, prepared practice team responding to the needs of the patient at the appointment. 	<p>Identify patient needs when booking the appointment and use the daily huddle to prepare the team for the day.</p> <p>Identify opportunities for front desk staff to respond to EMR alerts for preventive screening, and to prepare patients to be ready to receive care virtually.</p>

Adapted from Health Quality Ontario (HQQ) Script for Appointing Patients; HQO Advanced Access and Efficiency Workbook; Murray, M. (2005) Answers to your questions about same-day scheduling. *Family Practice Management*. Pg 59-64; HQO Predict the Expected – Contingency plans to manage advanced access scheduling.