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## Tips for Staying True to a Practice Schedule

By Lynne Flaherty

**Practices with long wait times are commonly the site of frustrated staff members, mismanaged physician time, and worst of all, upset patients.** In today's economy, practices cannot afford to turn a blind eye to these issues. The root cause of such dysfunction is likely a scheduling problem.

Many times it is not the schedule that is the problem, rather a lack of adherence to the schedule. No matter how good it appears on paper, a schedule is useless unless it is honored. Here are a few simple tips to help practices stick to their schedules:

**Develop a realistic schedule.** The goal of an ideal schedule is to maximize the number of patients seen within a day while maintaining the highest level of customer service. Establishing an effective schedule is complex and requires factoring in staffing, physician style, and appointment types and average lengths. Many methodologies exist for developing a functional schedule. It is up to management (physician and administrator) to determine which style works best for the practice.

**Plan for the unplanned.** Even the best schedules can be derailed by add-in appointments or late arrivals. To avoid this, practices must clearly outline policies for staff to follow when dealing with these situations. Last minute add-in appointments should only be accommodated in true emergency situations. Exactly what defines "emergency" must be outlined in the practice policy documentation so there is no confusion.

**Set clear expectations for patients.** It is important to set proper scheduling expectations for patients from the beginning. Patients who know they will be required to reschedule an appointment if they arrive late will make a greater effort to be on time. Once they understand that all of the practice's processes are motivated by a sincere desire to best serve them, they will feel more strongly about adhering to appointments and timelines.

**Avoid the blame game.** A large part of running an efficient practice lies in the hands of the staff. Without clear guidelines and outlined responsibilities, often times the ball gets dropped and the finger pointing begins. Management should review current job descriptions and make sure they are updated to include specific tasks for servicing the patient.

**Make appointment reminder phone calls.** With the world seemingly moving at warp speed these days, it is vital that the practice provide appointment reminders for all patients to avoid no-shows that lead to gaps in the schedule. Reminder phone calls, ideally made two days in advance, can reduce a practice's no-show rate significantly.

**Prepare for the next day.** The more time spent preparing a patient's chart in advance, the more time the physician can devote to that patient. By preparing charts a day ahead, the staff can become familiar with the patients on the schedule and prevent last-minute scrambling while the patient sits in the exam room. Every afternoon, a designated staff member should print and review the upcoming schedule and prepare charts for the next day.

**Establish an efficient check-in process.** Even if all patients arrived on time, if the required paperwork is not ready and the patients are not checked into the system in a timely manner, they will not be seen on time. To stay on schedule, patients should have all registration paperwork completed and in hand upon arrival.

**Develop an effective communication system.** Practices that frequently discover patients waiting, yet no one knows for whom or what they are waiting, might need a better system of staff communication. A good communication system is a simple and logical visual tool that allows all staff to work as a team to prevent any patient from being left behind. There are many options available depending on the practice patient volume. For high volume clinics, EHR tracking systems and light systems work well. For practices with lower patient volume that cannot invest in the previously listed options, one low-cost option is to implement a patient tracking board.

### A Strategic Imperative

Proper scheduling is not just a "nice to have" in today's challenging economic climate, rather it is a strategic imperative. Starting with a highly functional schedule and evaluating the effectiveness of a practice's process from first contact all the way through to clinical operations will shed light on areas needing improvement.



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