



A Public Agency

OneCare (HMO SNP)

CalOptima

Better. Together.

Improving Patient Satisfaction in the Medical Office

June 2012

Quality Service for Patients

We have all experienced great service and poor service at one time or another.

Great service makes patients want to come back. Poor service makes patients wonder why they went there in the first place.

It is our job to be professional, efficient, and friendly to patients in order to leave a **positive** lasting impression.

Your Role in Patient Satisfaction

- Be considerate and listen patiently – you are the information expert in the office
- Offer assistance and provide conflict resolution when necessary
- Provide timely service in a courteous manner
- Understand that a successful medical office depends on being **proactive, customer focused, and team players**

Steps for a Positive Patient Experience

1. ANSWERING THE PHONE

- Always try to answer phone calls by the **second ring**
 - A caller measures the quality of your medical office before hearing a voice by the number of rings it takes to get an answer
- Maintain a **friendly and positive tone** when you answer the phone or greet a patient at the front desk

It's not what you say, but how you say it

Steps for a Positive Patient Experience

2. GREETING PATIENTS AT THE FRONT DESK

- Make direct **eye contact** and give the patient a **warm smile**
- Help make the patient feel **welcomed**:
 - Ask about his/her day
 - Ask if he/she has any questions before visit
- **Be prepared** by having the patient's chart and any other relevant information readily available to reference for the patient's visit

Steps for a Positive Patient Experience

2. GREETING PATIENTS AT THE FRONT DESK (Cont.)

- Maintain **professional conversation** among co-workers at the front desk

Tip for Office: Implement daily office “huddles” to monitor and manage patient flow

Steps for a Positive Patient Experience

3. PATIENTS IN THE WAITING ROOM

- Create a **hospitable environment** in the waiting room:
 - Maintain a clean waiting area
 - Stock area with magazines and health education materials
 - Play pleasant music in the background at a low volume
 - Display a health education program on the TV (if available)
 - Offer a cup of water or have a water dispenser available
- **Acknowledge** if there is a wait longer than 15 minutes and **apologize** to the patient:
 - Provide an explanation for the delay
 - Frequently update the patient on their status of being called back to a room

Steps for a Positive Patient Experience

3. PATIENTS IN THE WAITING ROOM (Cont.)

- Use waiting time as an **opportunity to educate** the patient on any needed screenings and find out if the patient has received important shots

Tip for Office: Use a flag system or summary page in each patient's chart that displays the screenings and shots needed so the patient can be notified while in the office

Steps for a Positive Patient Experience

4. TAKING PATIENTS TO THE EXAM ROOM

- Greet the patient with a **smile** and ask how he/she is
- Direct the patient to a **clean room** in an organized manner
- Tell the patient the general **range of time** before seeing a practitioner
- Provide **health education materials** to read while waiting in the exam room

Steps for a Positive Patient Experience

5. PRACTITIONER MEETS WITH PATIENT

- Review the patient's chart **before** entering the room
 - Note topics you would like to discuss with the patient, in addition to the reason for their visit
- Allow ample time for the **patient to explain** how he/she is feeling and address any concerns
- Use **effective listening** skills:
 - Give the patient an indication you are listening
 - Let the patient finish his/her statement
 - Confirm your understanding by repeating the request/inquiry
- Assess if there are any **other health issues** you would like to discuss with the patient

Steps for a Positive Patient Experience

5. PRACTITIONER MEETS WITH PATIENT (Cont.)

- Clearly explain the diagnosis and status of the patient's health in **common terms**
- Discuss the **pros and cons** of the treatment options
- Provide **health education** for other health issues whenever possible
- Give the patient an opportunity to **ask questions**
- Conclude the visit with a **summary of the next steps** and an action plan

Steps for a Positive Patient Experience

6. OFFICE STAFF CLOSES THE VISIT

- **Remind patient** of any necessary tests or exams he/she should get
- Schedule any necessary **follow-up appointments**
- Schedule the patient's next **annual preventive health appointment**
- Ask the patient to fill out a **short survey** about the visit that can be anonymously dropped in a box to get feedback on your services
- Give the patient a smile and **nice farewell**

How to Handle Upset Patients

- Managing an irate patient may be difficult; however, it can be rewarding if done properly
- Whatever the emotional state of the patient, it is important to understand his/her needs
- The patient is not upset at you. Don't take it personally!

Take the HEAT!

How to Handle Upset Patients

- **H**ear Them Out
- **E**mpathize
- **A**pologize
- **T**ake Action

How to Handle Upset Patients

Hear Them Out

- Allow the patient to speak and state his/her concerns without interrupting
- Ask questions to help you understand his/her needs
- Demonstrate active listening skills

Empathize

- Put yourself in the patient's shoes
 - How would you feel if the same thing happened to you?
- Treat the patient the way you want to be treated

How to Handle Upset Patients

Apologize

- Be sincere and specific with your apology
- Avoid over-explaining the mistake
- Acknowledge the patient's stress without playing the blame game
 - Example: "I'm sorry you had this problem."

Take Action

- Do whatever possible to correct/resolve the problem/issue
- Follow through until the issue is resolved
- Deliver on promises. If you can't deliver it, don't promise it.

Final Thought

- In a medical office, you play a very important role - you are often the first person a patient talks to and **you make a difference**
- You have one of the most important jobs in your organization - you help **build the reputation** for outstanding service
- There is no substitute for the human touch you provide when you **deliver excellent service** and quality interactions with patients

CalOptima's Mission

To provide members with access to quality health care services delivered in a cost-effective and compassionate manner

Other Resources

- Go online to www.caloptima.org to get more resources to help you with your patient care
 - Click on the “For Providers” link
 - Click on “Manuals, Policies and Resources”
 - Click on any of the resources available, especially on the left-side panel:
 - **Provider Toolkit** - to assist you and your staff with your daily office functions
 - **Health Education** – to access the Health and Wellness library materials and various clinical assessment tools
- Go to the California Quality Collaborative website www.calquality.org for ideas for how to improve patient care and satisfaction
 - Download this resource on their website:
http://www.calquality.org/programs/patientexp/resources/documents/Improving_Pt_Experience_Spread_Change_Pkg_UpdatedMay2011.pdf

Patient Satisfaction Assessment

- Please click on the link below to access the Patient Satisfaction Assessment. The questions are based on the information provided in this presentation. There are a total of 10 questions.

- **[2012 PATIENT SATISFACTION ASSESSMENT](#)**