Tips to Develop an Effective Patient Schedule

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Financial Disclosure

Elizabeth, Maureen and Laurie have the following financial interests or relationships to disclose:

BSM Consulting – C

Elizabeth, Maureen, and Laurie are Senior Consultants at BSM Consulting. BSM Consulting provides practice management solutions to specialty care providers, including the online resource BSM Connection® for Ophthalmology.

Course Objectives

1. Review Time and Motion studies, along with key benchmarks to track.
2. Review patient schedule examples.
3. Discuss a Case Study of a successful practice.
4. Review common problems and solutions related to patient schedules.
5. Outline process to implement new schedule templates.
Most patient schedules are based on the technician work-up time.

To create an effective schedule...

Start with the end in mind.

It’s the Doctor!

Create schedules based on how the Doctor moves from room to room.
Data Analytics

Understand industry

**Benchmarks.**

Making Sense of the Data

Office Visit Benchmarks

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Time (minutes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech Work-Up Time</td>
<td>10</td>
</tr>
<tr>
<td>Visit Time for the Doctor</td>
<td>10</td>
</tr>
<tr>
<td>(not including dilation time)</td>
<td></td>
</tr>
<tr>
<td>Dilation Time (if applicable)</td>
<td>15 to 25</td>
</tr>
<tr>
<td>Doctor Exam Time – General Ophthalmology</td>
<td>5 to 8</td>
</tr>
<tr>
<td>Doctor Exam Time – Retina and Refractive (new patient)</td>
<td>10 to 12</td>
</tr>
<tr>
<td>Check Out Time</td>
<td>2</td>
</tr>
<tr>
<td>Total Elapsed Time (without dilation)</td>
<td>48.5 to 54</td>
</tr>
<tr>
<td>Total Elapsed Time (with dilation)</td>
<td>63.5 to 66.5</td>
</tr>
</tbody>
</table>
ASOA – EHR Benchmarks

How long should it take our techs to work up patients?

Overall, for all exam types and all patients in our survey, a typical tech takes about 11
minutes to work-up a patient if using paper charts and 10:37 using electronic health records.
However, the type of exam affects the time techs need to spend with patients as shown in
this table, which includes patients worked up with both EHR and paper charting.

<table>
<thead>
<tr>
<th>TYPE OF EXAM</th>
<th>Number of Patients</th>
<th>History</th>
<th>Balance of Workup</th>
<th>Total Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Patient</td>
<td>597</td>
<td>6:00</td>
<td>12:00</td>
<td>18:00</td>
</tr>
<tr>
<td>Comprehensive Exam with Refraction</td>
<td>167</td>
<td>4:00</td>
<td>6:12</td>
<td>11:00</td>
</tr>
<tr>
<td>New Patient Emergency Exam</td>
<td>78</td>
<td>8:00</td>
<td>8:00</td>
<td>16:00</td>
</tr>
</tbody>
</table>

Time and Motion Studies

Clinical Data to Track

- Average doctor minutes for short exams
- Average doctor minutes for long exams
- Average tech time for patient history and chief complaint
- Average tech time for refraction (including autorefration)
- Average tech time for diagnostic tests (i.e., automated visual fields, OCT, and IOL Master/A-scan)
- Average dilation time (or the amount of time one estimates it should take)
- Average time from patient check-in until patient ready (chart up)
Patient Exam Types

<table>
<thead>
<tr>
<th>Brief</th>
<th>Intermediate</th>
<th>Long</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. MD Time: &lt; 5 Min.</td>
<td>5-10 Min.</td>
<td>Avg. MD Time: &gt;10 Min.</td>
</tr>
<tr>
<td>Brief Follow-up</td>
<td>3-4 Week Postop</td>
<td>New Patient Exam</td>
</tr>
<tr>
<td>Brief Postop</td>
<td>3-Month Glaucoma Check</td>
<td>Initial Visit Cataract</td>
</tr>
<tr>
<td>Diabetes Follow-up</td>
<td>Glass Checks</td>
<td>Initial Viso Rebuttals</td>
</tr>
<tr>
<td>Evaluate Gonioscopy</td>
<td>Visual Field Followed by a Visit with the Doctor</td>
<td>Second Opinion</td>
</tr>
<tr>
<td>Dry Eye Check</td>
<td>Sclera Removal</td>
<td>Newborn’s Compensation Exam</td>
</tr>
<tr>
<td>Computed Cine</td>
<td>Pre-op Testing</td>
<td>Neurosurgery Determinants Exam</td>
</tr>
<tr>
<td>Phlebotomy Check</td>
<td>FAR Flight Exam</td>
<td></td>
</tr>
<tr>
<td>Contact Lens Check</td>
<td>Minor Surgical Procedures such as Glaucoma</td>
<td></td>
</tr>
</tbody>
</table>

Understand Patient Demand

- Analyze your office’s physical space
- Look at patient visits by CPT code:
  - New Patients
  - Established Patients
- Determine how to categorize short, intermediate, and long exams
- Review patient wait time to schedule appointment
- Outline how many exam slots each provider needs to support current volume of patients

Case Study

- 3 MD Practice in Eugene, OR
  - 2 techs per MD + 1 tech for special testing/overflow
  - 1 scribe per MD
  - 1 VF tech, 1 contact lens tech
  - Rotated positions each session (half day)
- Adopted “ZERO Wait” policy for practice
- Completed time study to identify needs
- Eliminated the “intermediate” time slot
- Created new exam types for their practice
  - Post-op
  - Refractive screening
  - Pediatric exam
Develop Templates

Proportional Scheduling

6 Patients per Hour (24 Patients/Session, 48 Patients/Day)

<table>
<thead>
<tr>
<th>Time</th>
<th>8:00</th>
<th>8:10</th>
<th>8:20</th>
<th>8:30</th>
<th>8:40</th>
<th>8:50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam Type</td>
<td>Brief</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
<td>Intermediate</td>
<td>Long</td>
</tr>
<tr>
<td>Time</td>
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<td>9:20</td>
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<td>9:40</td>
<td>9:50</td>
</tr>
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<td>Long</td>
<td>Intermediate</td>
<td>Long</td>
<td>Brief</td>
<td>Intermediate</td>
</tr>
</tbody>
</table>

Develop Templates (continued)

Wave Scheduling

6 Patients per Hour (24 Patients/Session, 48 Patients/Day)

<table>
<thead>
<tr>
<th>Time</th>
<th>8:00</th>
<th>8:10</th>
<th>8:20</th>
<th>8:30</th>
<th>8:40</th>
<th>8:50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam Type</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
<td>Intermediate</td>
<td>Long</td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>9:00</td>
<td>9:10</td>
<td>9:20</td>
<td>9:30</td>
<td>9:40</td>
<td>9:50</td>
</tr>
<tr>
<td>Exam Type</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
</tr>
</tbody>
</table>

Develop Templates (continued)

Clinic Scheduling

6 Patients per Hour (24 Patients/Session, 48 Patients/Day)

<table>
<thead>
<tr>
<th>Time</th>
<th>8:00</th>
<th>8:10</th>
<th>8:20</th>
<th>8:30</th>
<th>8:40</th>
<th>8:50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam Type</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
<td>Intermediate</td>
<td>Long</td>
<td></td>
</tr>
<tr>
<td>Time</td>
<td>9:00</td>
<td>9:10</td>
<td>9:20</td>
<td>9:30</td>
<td>9:40</td>
<td>9:50</td>
</tr>
<tr>
<td>Exam Type</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
</tr>
<tr>
<td>Time</td>
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<td>10:20</td>
<td>10:30</td>
<td>10:40</td>
<td>10:50</td>
</tr>
<tr>
<td>Exam Type</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
<td>Brief</td>
<td>Intermediate</td>
<td>Long</td>
</tr>
</tbody>
</table>

Tips to Develop an Effective Patient Schedule
### Common Problems / Possible Solutions

#### Emergencies
- Specific appointment type
- End of session
- Larger practices: Assigned triage doctor

#### No Shows / High CX Rates
- Evaluate common types/times
- Build extra slots where least damaging to flow

#### Doctors Not Starting on Time
- Evidence of impact (patient satisfaction surveys, staff satisfaction surveys, cost of lost efficiency)
- Change schedule
- Possible impact to compensation

- Build in time for call returns / schedule calls and block schedule
- Use scribe/traffic cop to help move doctor
- Training
Common Problems / Possible Solutions

Registration Takes Too Long

- Advanced eligibility/insurance information
- Advanced paperwork
- Specific new patient slots, spread out
- Only established patients at clinic start
- Health questionnaire AFTER registration paperwork tech

Incorrect Scheduling

- Training
- Cross training
- Written protocol
- Computer system to block double booking
- Root out the real reasons

Implementation

Use team approach with task force

- Develop an action plan
- Assign person(s) responsible and due dates
- Schedule future date to avoid rescheduling patients
- Train phone staff to follow the template
- Develop SMART goals
- Continue to train, monitor, and adjust

Action Plan

<table>
<thead>
<tr>
<th>Description</th>
<th>Responsible Party</th>
<th>Completion Date</th>
<th>Notes / Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete time-in-motion study</td>
<td>Administrator</td>
<td>MM/DD-YY</td>
<td></td>
</tr>
<tr>
<td>Compare practice to industry benchmarks</td>
<td>Administrator</td>
<td>MM/DD-YY</td>
<td></td>
</tr>
<tr>
<td>Create template task force</td>
<td>Administrator</td>
<td>MM/DD-YY</td>
<td></td>
</tr>
<tr>
<td>Create new templates</td>
<td>Administrator</td>
<td>MM/DD-YY</td>
<td></td>
</tr>
<tr>
<td>Determine template start date</td>
<td>Administrator</td>
<td>MM/DD-YY</td>
<td></td>
</tr>
<tr>
<td>Complete staff training</td>
<td>Administrator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go LIVE!</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monitor and make adjustments</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**S.M.A.R.T. Goals**

- **S**pecific
- **M**easurable
- **A**ttainable
- **R**elevant
- **T**ime-Oriented

**SMART Goal Examples**

- Reduce patient appointment wait time to ___ minutes.
- Complete comprehensive patient exams in 90 minutes or less.
- Routinely end at 5:00 pm while maintaining high levels of customer service.

**Best Practices**

- Schedule emergency patients strategically
- Build “clinic” schedules
- Stagger doctor start-times
- Verify patient insurance before check-in
- Build in physician administrative time
- Minimize patient hand-offs
- Schedule diagnostic testing
Be **patient** and never stop **improving**.

**Summary**
- Track important clinical data and benchmarks
- Develop schedule by patient type
- Understand common problems and solutions
- Implement a plan for change
- Strive for continuous improvement

**Thank you for attending!**

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