



YOUR PRACTICE / BUSINESS

## Tips for Optimizing the Patient Journey

HOW TO CREATE A SEAMLESS PATIENT EXPERIENCE FROM THE START

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### WHAT YOU NEED TO KNOW

- Practice management software offers patients the ability to book themselves in for appointments via an online booking site.
- Practice management software also provides greater control over how an acupuncturist's schedule can be set up.
- What's more, creating rapport with patients can be simplified with practice management software.

Practitioners who are intentional about the way their patients interact with their clinic, even before they are treated, is an important first step in creating trust in a health care setting. For example, opening the lines of communication, being transparent about fees, and offering convenient ways to book treatments can go a long way in cementing strong relationships.

Practice management and electronic medical records (EMR) systems can help to facilitate the above and essentially guide the patient journey, starting with the initial appointment booking through to the long-standing patient. Ultimately, this software can play a key role in defining how practitioners develop rapport and instill confidence in their practice among patients.

#### Making The Booking Experience Convenient (For Everyone)

A clinic's booking process provides a valuable opportunity to set expectations and lay the foundation for a positive experience.

Practice management software offers patients the ability to book themselves in for appointments via an online booking site. Details on the online booking site can be customized, and important information like treatment type, cost, appointment length and description can be displayed. This creates transparency and ensures expectations between patient and clinician are aligned.

Patients are seeking out digital ways to book visits with their health care providers. The 2023 *State of Patient Access* report by Experian Health reveals that 76% of survey respondents “would like to schedule appointments online or via mobile device.”<sup>1</sup>

These tools can also offer waitlist options, allowing patients to add themselves and be notified if and when a previously taken appointment opens up due to a cancellation. On this note, appointment reminders can be sent via email or SMS, helping to reduce the risk of a no-show or forgotten appointment.

From a practitioner’s perspective, opting for an online booking site also helps in expediting workflows that would normally involve manually collecting patient information.

### Optimizing Appointment Setup & Staying Organized

Practice management software provides greater control over how an acupuncturist’s schedule can be set up. Practitioners can choose how many patients they want to see in a given time and stagger start times for each appointment. In addition, they can seamlessly chart for multiple patients as they move from room to room.

Practitioners can also maintain organization by tracking and managing spaces, tables, and devices within the software.

EMRs, often integrated with payment solutions, also offer a variety of ways to collect fees securely based on patient preference. While a patient might choose to pay onsite, payments can also be processed online and receipts can be sent via email. Patients can also pay by email or SMS at home through a secure link sent by a clinic via a pay balance email or SMS.

### Staying Connected, Post-Treatment

Creating rapport with patients can be simplified with practice management software. Perhaps a practitioner wants to share a document with their patient post-appointment. The software can facilitate this exchange and keep a record of shared documents within a patient’s online profile.

Along with delivering excellent care, creating an outstanding experience for patients is no small feat. Practice management and EMR systems can help remove roadblocks that might stand in the way, including patient friction or confusion in booking an appointment. Additionally, practitioners can free up time normally spent on collecting information over the phone and focus on other tasks.

Ultimately, these tools help guide the patient journey from initial visit to long-standing patient in a way that’s personable, genuine and appropriate for a practice.

### Reference

1. Report 2023: *The State of Patient Access - The Digital Front Door*. Experian Health, 2023.

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