



CalOptima Health

Improving Patient Satisfaction in the Provider Office

Our Mission

To serve member health with excellence and dignity, respecting the value and needs of each person.

Our Vision

Provide all members with access to care and supports to achieve optimal health and well-being through an equitable and high-quality health care system.

Quality Service for Patients

- We have all experienced great 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

This is Aptos 12 pt. You can place footnotes in this section here. If you do not have footnotes, just leave the field as is and it will not show up in your presentation.

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
 - Before hearing a voice, a caller measures the quality of your medical office 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 (cont.)

- 2. Greeting patients at the front desk
 - Make direct eye contact and give the patient a warm smile
 - Help make the patient feel welcome
 - Ask about their day
 - Ask if they have any questions before their 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 (cont.)

- 2. Greeting patients at the front desk (cont.)
 - Maintain professional conversation among coworkers at the front desk
 - Tip for the office: Implement daily office “huddles” to monitor and manage patient flow

Steps for a Positive Patient Experience (cont.)

- 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 (cont.)

- 3. Patients in the waiting room (cont.)
 - Use waiting times as an opportunity to educate the patient on any needed screenings and find out if the patient has received important shots
 - Tip for the office: Use a flag system or summary page in each patient's chart that displays the screenings and find out if the patient has received important shots

Steps for a Positive Patient Experience (cont.)

- 4. Taking patients to the exam room
 - Greet the patient with a smile and ask how they are
 - 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 (cont.)

- 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 they are feeling and address any concerns
 - Use effective listening skills:
 - Give the patient an indication you are listening
 - Let the patient finish their 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 (cont.)

- 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 (cont.)

- 6. Office staff closes the visit
 - Remind patient of any necessary tests or exams they 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 their needs
- The patient is not upset at you. Don't take it personally!
- Take the **HEAT!**

How to Handle Upset Patients (cont.)

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

How to Handle Upset Patients (cont.)

○ **H**ear Them Out

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

○ **E**mpathize

- 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 (cont.)

○ Apologize

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

○ Take Action

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

Final Thoughts

- 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



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