



# 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

By 2027, remove barriers to health care access for our members, implement same-day treatment authorizations and real-time claims payments for our providers, and annually assess members' social determinants of health.

# 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

# 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

# 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 preventative 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.)

## ○ **Hear 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

## ○ **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 (cont.)

## ○ **Apolo**gize

- 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"

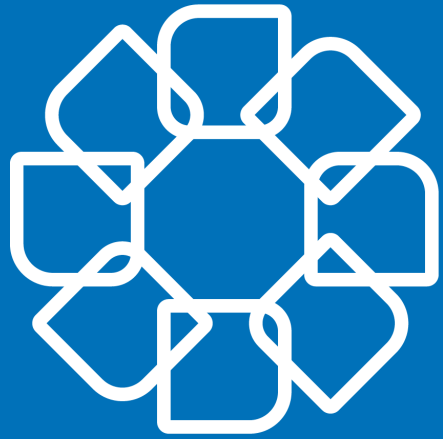
## ○ **Take Action**

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



# 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



# CalOptima Health

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