

Scheduling Template and Self-Service Enablement: Case Study

CLIENT PROFILE

- Academic Medical Center
- 2,200 Beds
- > 3,000+ employed physicians
- 6,500 Affiliated physicians
- Majority implemented EHR/PM/RCM enterprise-wide

THE CHALLENGE

- Long call times for appointment scheduling
- Long wait times for primary care and specialist appointments
- Referral leakage to competitive health system due to long appointment wait times
- Schedules are not optimized – variances in visit types and durations
- Assumptions that scheduling templates often failed to support contract patient facing hour expectations
- Centralized call center often called providers administrators to check availability before scheduling appointments regardless of schedule availability
- Patient self-service scheduling not broadly deployed and reduced during COVID surge timeframe
- Overall lack of accuracy in appointment availability/transparency to support expansion of patient self-service scheduling

RETURN ON INVESTMENT

- Optimized >7,500 templates
- Aligned scheduling templates to ensure providers contact hour obligations are met
- Instituted scheduling template best practices to avoid losing patients to competing healthcare facilities due to inability to see patients timely
- Added patient self-service scheduling across multiple specialties for nearly 1,700 providers
- Doubled online scheduling rate from 2.6% to 5.6%
- Q1 call center savings >\$900K from online scheduling improvements
- 45% increase in new patient Primary Care office visits booked online
- 260% increase in new patient Specialty appointments booked online
- 4-day improvement in average appointment lead time
- Bump rate improved from 2.1% to <1%

HIGHLIGHTS

A sample of optimization initiatives include:

- Interview administration, managers, clinic and call center staff, and providers
- Collaborative project tasking with direct involvement of providers, resources, and support staff
- Collecting documentation and data extracts, including provider templates, scheduling guidelines, and various practice and patient access metrics from each Department and provider
- Assess practice and call center strengths and challenges in the areas of call wait times, managing incoming requests, patient screening protocols, process for overriding the schedule and need to contact clinics and providers
- Remote video conferencing system demonstrations with providers and staff to educate on schedule/template functionality to best understand design and implementation
- Complete review, assignment, reassignment, and enablement of all visit types and visit type durations across enterprise provider templates
- Assessment, design, and implementation of schedule template sessions, blocks, appointment reasons, and instructions
- Standardized and reduced visit lengths, expanded slot availability, and contact hours
- Oversight of self-scheduling enablement at Department and Provider levels to meet template optimization design
- Enterprise template governance policies and procedures, best practice tips and toolkits, and post-implementation maintenance transition handoff