

KICKOFF MEETING
10 Most Critical Questions
Doctor's Office :: ONLINE SCHEDULING

BIG PICTURE

- Who are the Decision makers for this project and are any of those decision makers not present at this meeting today?

GOALS:

- What's working really well with the current way you schedule patients? What's not working at all?
- What are your top three scheduling goals? In other words, what would a smashing scheduling success look like for your organization.

SCHEDULING DETAILS

- Step by step, tell me the entire flow (including staff) of how an appointment is currently being scheduled.
- (for any unanswered questions from previous question) Help me understand the details of the appointments. (Ex: How many providers are seeing patients? How many separate provider locations are there? How long are appointments? Are there different types of appointments? Do providers need breaks between appointments?)
- PAPERWORK: Are there any paperwork/forms/releases/intakes required to complete a successful patient scheduling (ex: HIPAA release, Medical Records release, Intake Form, etc)?
- PAYMENT: Do you require pre-payment or deposit or any verification (ex: proof of veteran status) in order to schedule?
- How do you handle late cancellations and no shows?

AVAILABLE DATA

- When your potential/new patients call your office or walk in off the street what are the 3 most common questions they ask to decide if they want to schedule?
- What existing consistent feedback regarding scheduling (yelp reviews, emails, surveys, voicemails) do you have from current patients?