New Patient Onboarding Introduction

Hey, everyone,

In this section we're going to discuss onboarding new patients.

By onboarding, I mean everything that is required to get a new patient established in your practice, from the initial application through the scheduling of the initial consult.

In a conventional practice with a traditional model, setting up a new patient is pretty straightforward. The prospective patient calls the practice, and the phone is answered by a front-desk person that is sitting in the office during business hours. The patient describes what they want to be seen for and by whom, if the office has multiple clinicians, and the front-desk person takes the necessary info and schedules the first appointment.

However, in the lean model I'm teaching you, it's not quite so simple. You will likely not have a full-time front-desk person sitting there all day waiting to answer the phone—in fact, if you're renting a room in a shared office, it's possible you might not have a front desk at all.

One option would be to simply allow prospective patients to leave a message and then have your patient administrator call each of them back. The upside of this approach is that the prospective patient can talk to a member of your staff and ask any questions they might have about working with you. It also gives your staff a chance to screen patients and determine whether they are a good fit for your practice. If you are just starting out, and you're not receiving a high volume of inquiries each day/week, this is probably the best approach.

The downside of doing it this way is that you may end up devoting staff resources to calling people back who aren't really ready to become a patient, for any number of reasons. If you are busy and receiving multiple inquires every day, this can be a big time suck for your staff.

With this in mind, I'm going to give you two options for onboarding new patients, depending on where you are in your career and what your preferences are. Some clinicians simply prefer a more hands-on, personal approach—especially up front—while others may see value in automating parts of the onboarding process to make it more efficient and cost effective.

Okay, let's dig in!