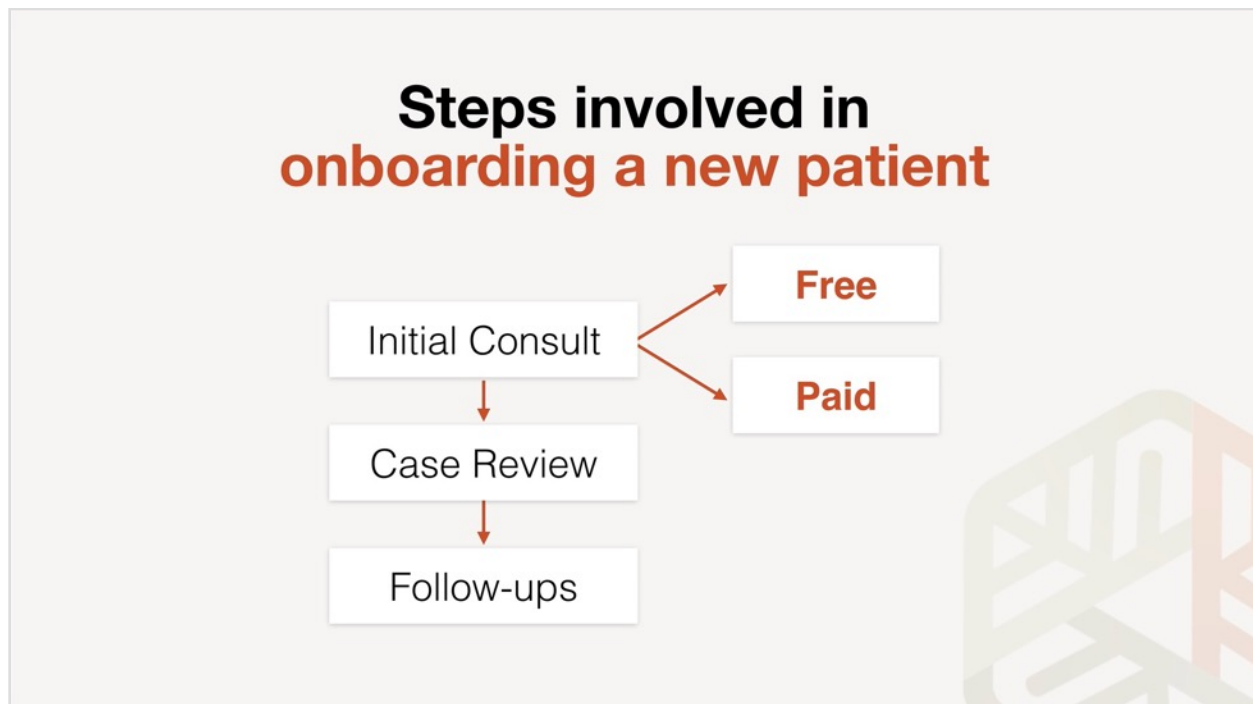


# New Patient Onboarding – Part 1

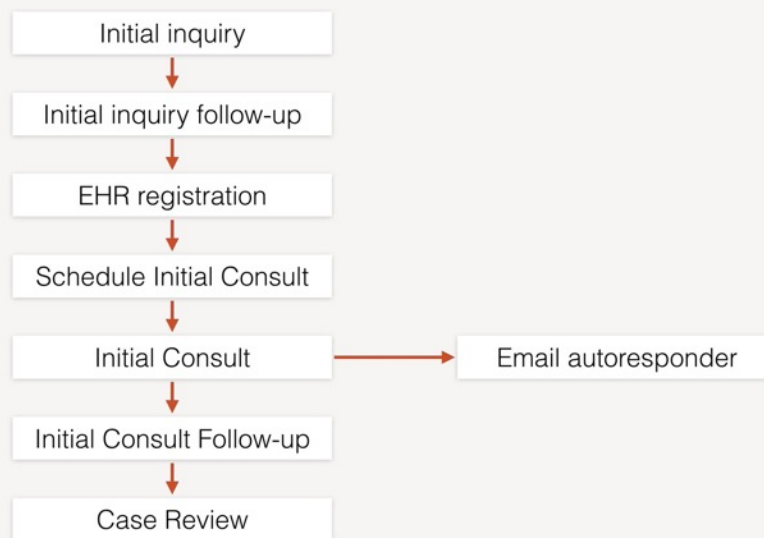
Hey, everybody, in this practice management presentation, we're going to review the steps involved in onboarding new patients. When we talk about new patient onboarding, I'm referring to everything that needs to happen from initial patient inquiry, when they first contact you about becoming a new patient, through the completion of the case review, and then transition to follow-up care. So as a reminder, here's a visual overview of the patient flow, which we've talked about before.



New patients will start with an initial phone or video consult, depending on your preference or their preference. That initial consult might be free, if you're just starting out as we've discussed, or it could be paid if you're more established, and the appointment length can be anywhere from 15 to 30 minutes, depending on whether you're doing a free consult or a paid consult. From there, you move on to the case review appointment, which is a 60- to 75-minute in-office appointment where you present the report of findings and treatment plan, and you answer any questions that the patient may have. And then after that, you move on to follow-up care, which is how you execute the treatment plan over time.

So let's start with an overview of all the steps involved, and then we'll talk about each one in more detail.

## Steps involved in onboarding a new patient




Make sure to download the outline of the new patient onboarding process; we have a handout available in the supplemental materials area. So let's start with the initial application. We use an online form, we use Wufoo, but there are plenty of other online providers that offer similar functionality. So the patient fills out an online form that triggers an email autoresponder that sends them an email automatically after they submit the form with some additional information.

The next step is to follow up on that initial application, and this can be automated by email or you can do it by phone, depending on your staff resources and where you're at. Then the patient is directed to register in your electronic health record, MD HQ in our case. They would electronically sign a privacy and cancellation policy, provide their credit card information, and then their basic patient information.

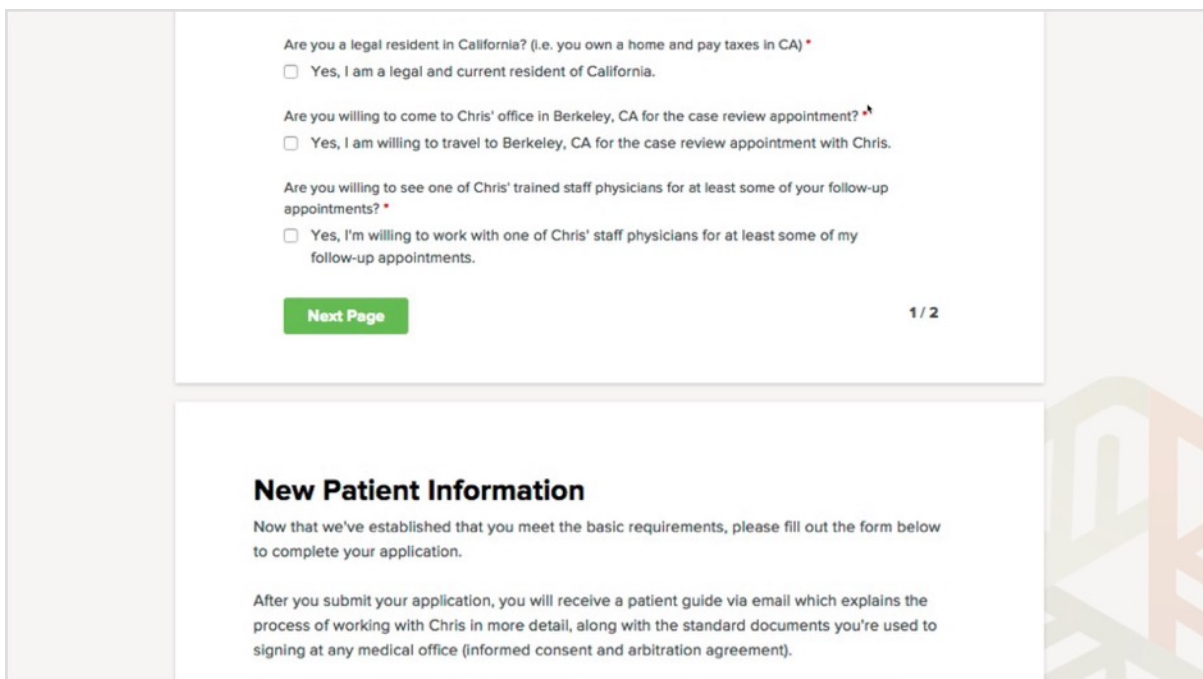
From there, they would schedule their initial consult. We use the MD HQ built-in scheduling system, prior to that we were using GenBook, which is another online calendar system, but I like to have it all under one roof with MD HQ. Then, after the initial consult is scheduled, the next step will be the initial consult itself. After the initial consult, you can send additional emails, follow up, and encourage the patient to move on to the case review. We also have a follow-up that we do, a phone call follow-up after the initial consult, where a member of our staff calls and does some follow-up, which we'll discuss later, and then we have the case review appointment itself. So that's an overview of the steps.

So the first step in more detail here is the initial application. The purpose of this is to welcome the patient, establish the basic requirements for working with you, collect the relevant info for moving to the next step, and inform the patient of what those next steps are going to be. So we

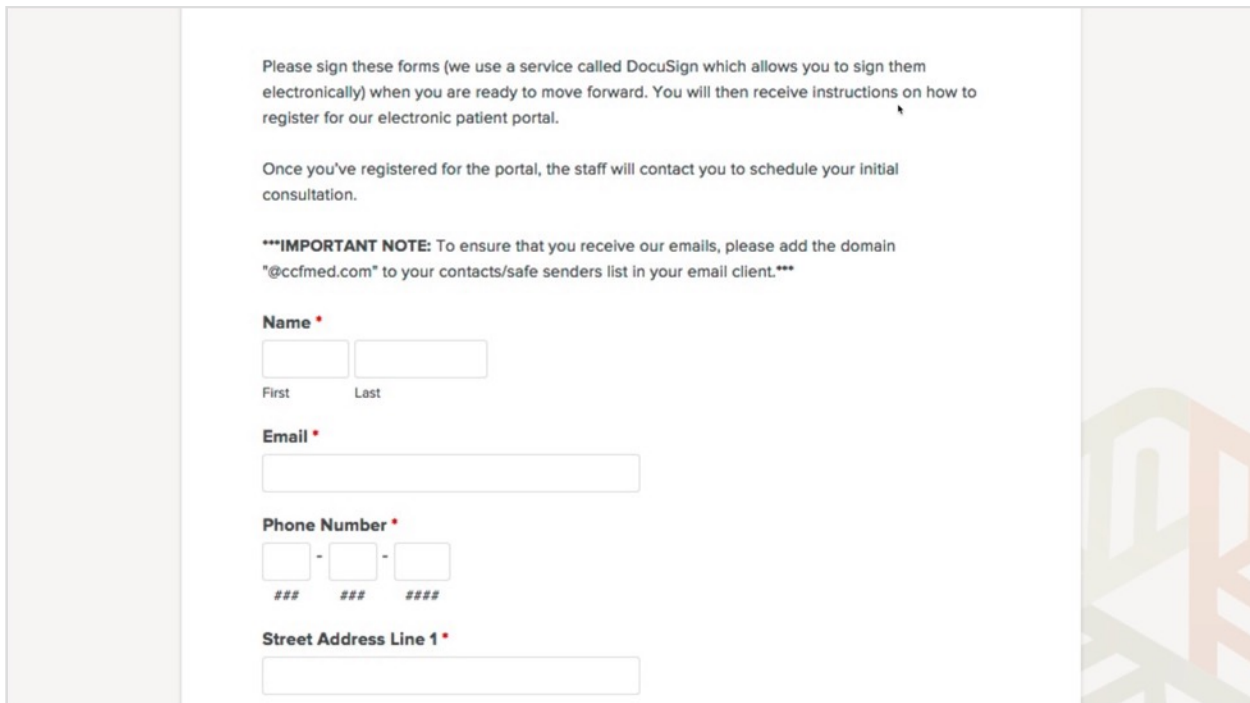
accomplish this, again, using an online form, we use Wufoo. There are plenty of others out there, and here's a screenshot of the first part of the application.



You can also see it by going to our website, CCFMED, and click on New Patients and follow the links to the application form. The first section just welcomes them and explains a little bit of the process. The next section establishes the basic requirements of becoming a patient in our practice.



So, for a period of time I was only accepting patients that resided in California; that's not the case now, but when I took this screenshot it was the case, so it asks them if they're a legal resident of California. It asks them if they're willing to come to my office in Berkeley for the case review appointment, because that's a mandatory requirement, in-person appointment for the case review, and then I ask if they're willing to see one of my trained physicians for at least one of the follow-up appointments because my time in the clinic is somewhat limited, given my other obligations and commitments. I have trained Dr. Nett, as many of you know, and we're about to hire another clinician, and they do some of my follow-ups. I continue to do follow-ups with my patients, but given my patient load and number of hours available, it's necessary for me to have some help there, and so in order for a patient to come into my practice as a patient of mine, they have to be willing to do at least some of the follow-ups with the clinicians that I've trained.



Please sign these forms (we use a service called DocuSign which allows you to sign them electronically) when you are ready to move forward. You will then receive instructions on how to register for our electronic patient portal.

Once you've registered for the portal, the staff will contact you to schedule your initial consultation.

**\*\*\*IMPORTANT NOTE:** To ensure that you receive our emails, please add the domain "@ccfmed.com" to your contacts/safe senders list in your email client.\*\*\*

**Name \***

First Last

**Email \***

**Phone Number \***

-  -   
### ### ###

**Street Address Line 1 \***

So then we tell them a little bit more about what to expect after they complete the applications, we give them some forms to sign, then we ask them for the basic information we need to add them to the wait list—name, e-mail, phone, address—and then they submit that form. So, regardless of whether patients are finding you online or calling your office as the initial inquiry, I do recommend directing them to a form like this to apply because it allows you to efficiently capture their information, and if you're automating the follow-up, then it triggers the next step in the process.

So when a patient submits that initial application, they should be added to your email list, and again there are numerous providers. We use MailChimp, there are others like AWeber and Infusionsoft. I've used most of these, if not all of them, over the years, and MailChimp is the one I

prefer—feel free to ask me why in the webinar’s Q&A—but it doesn’t really matter, a lot of it comes down to personal preference and which one feels right for you, but one of the reasons that MailChimp is nice is that it integrates with Wufoo, so when a patient submits the Wufoo application form which I just showed you, you can set it up so that they’re automatically added to your email list. You have to have a little checkbox that the patient ticks giving you permission to send them email, but when a patient is signing up to become a patient or to your wait-list, they’ll almost certainly check that box because they’ll want to receive email follow-ups that advise them of what the next steps are and what their position is on the wait-list, if you have a wait-list. So, they can be added to just your general email list, or they can be added to a segment of your email list, which is what I recommend. A segment is like a grouping, and you can create a segment called “prospective patients” or something like that in MailChimp, and when the patient completes the form, they’ll be automatically added to that segment, and that way you can keep track of who’s who in your email list, and if you have a group of people who filled out that form but didn’t go on to become a patient, then you can, if you’d like, you can email them later if you decide to do any kind of promotion, or if you have any changes in your practice or things that you think might interest them, you’d be able to know who they are and email them as a group.