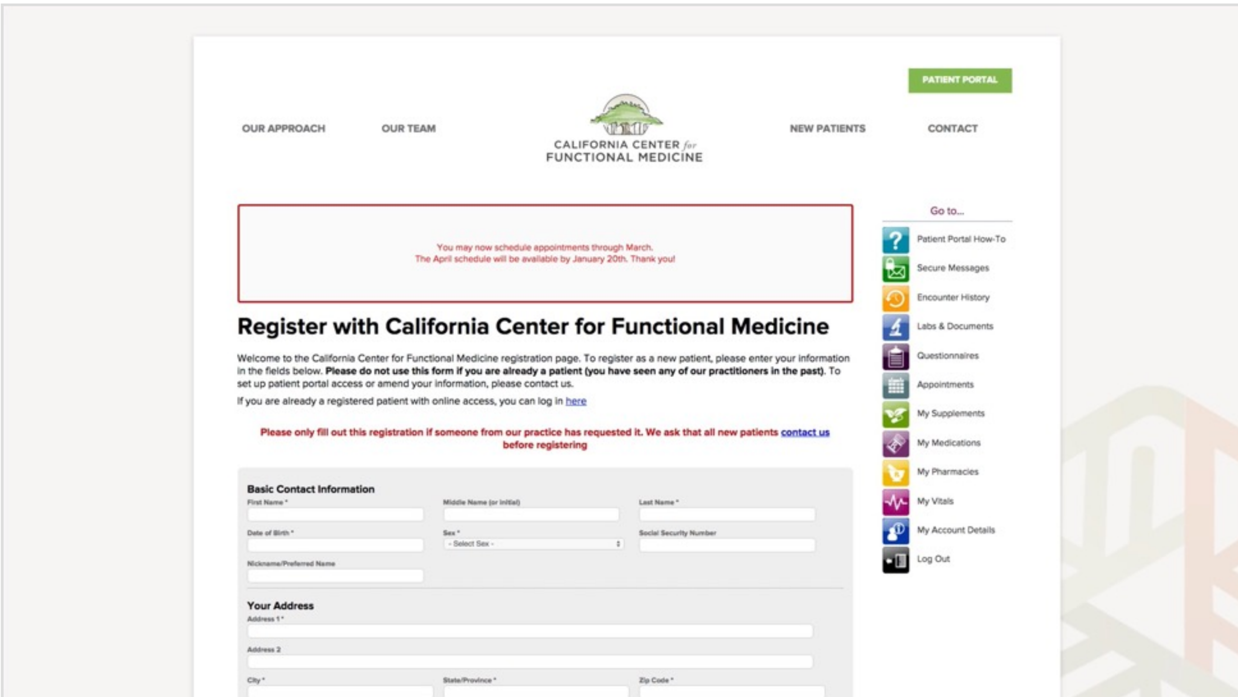
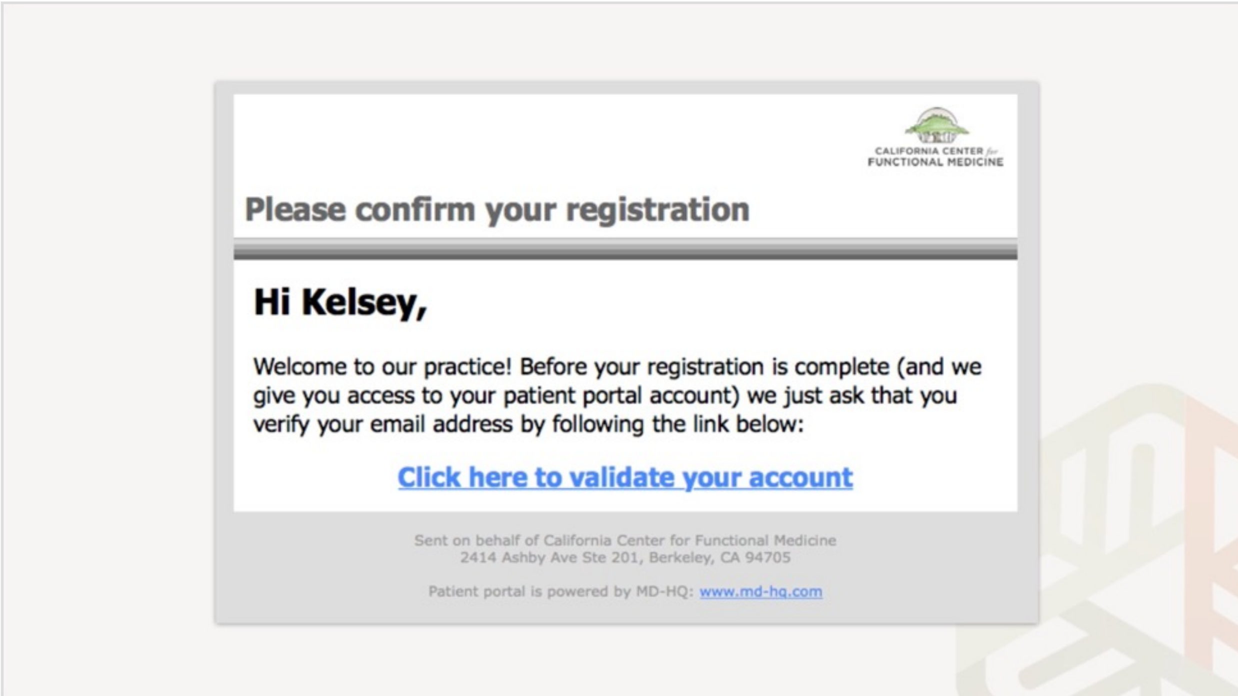
New Patient Onboarding – Part 3

So the next step is getting them registered for your EHR, again we're using MD HQ and that's the one I'll be teaching throughout the course. This is a screenshot of the registration page.



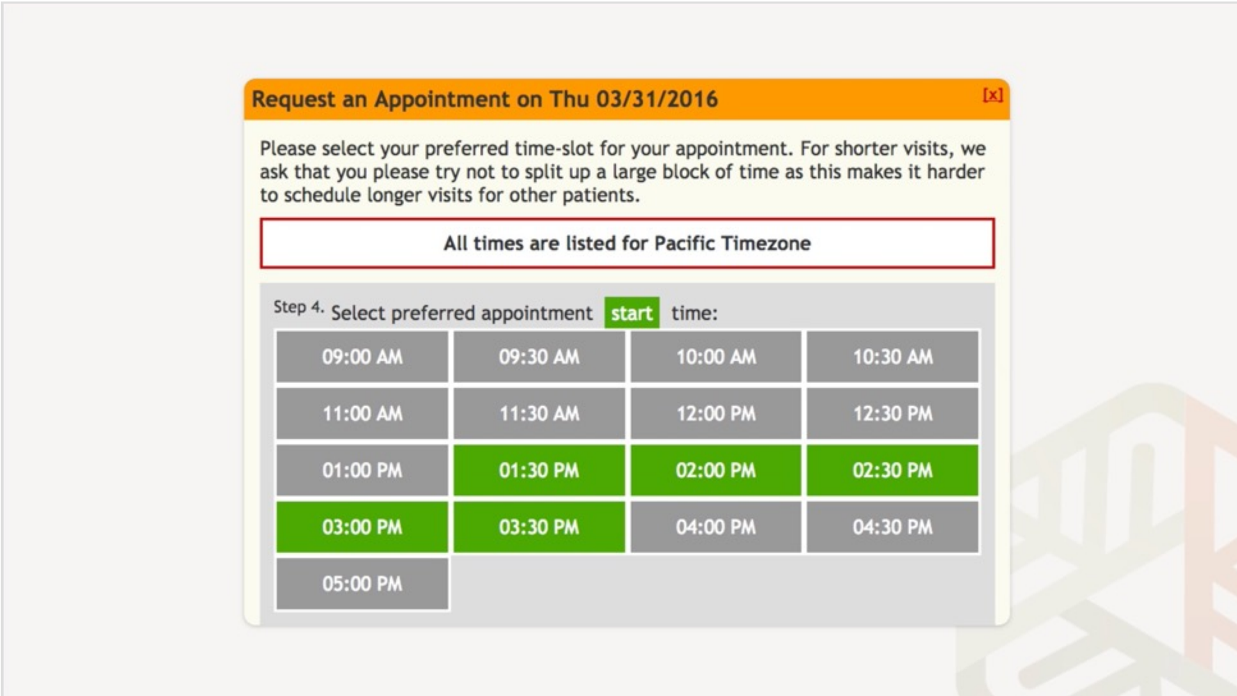
It's pretty basic stuff. We ask for a few things. A patient has to electronically sign the privacy policy, that's a requirement of MD HQ, which describes how we protect their sensitive information. They have to sign a new patient agreement, which talks a little bit about how our practice works and also has some basic legal stuff, and then they have to sign the cancellation policy, gives them very clear guidelines about cancellation and what we charge if they don't abide by the policy, and then they have to provide their personal information and their credit card details so we're able to charge them for that initial consult. So it's all the typical info you'd collect before the first appointment, but it's done electronically in a secure way, and it's really great because once they complete this process, you have everything you need to go to the next step.

So once they finish the registration, they see a confirmation screen like this:



So, it welcomes them to the practice and they have to verify their email address, and again, in our new updated version of this process, we're thinking about having another video of me talking about the next steps, a little bit more information and then a link directly to the scheduling system so they can go on to schedule their initial consult. So they've just registered, they've submitted all the information they need, and the next step is to actually schedule the initial consult using the online system. So, the way we have it set up right now is they get an email that asks them to schedule their initial consult from our staff, which obviously involves a bit more manual labor on our part, but the way we're going to set it up is this confirmation screen will have a video of me, it'll have this basic information, it'll still need to confirm their email address, but there will also be a link to the MD HQ scheduling system, which will allow the patient to schedule their own appointment. And again, if you want to do kind of a hybrid automated process with a little more interaction, if the patient has registered in MD HQ but they haven't scheduled an initial consult within three to four days or a week or whatever time period you choose, then you can follow up with them on the phone, you can give them a call and ask them if there's anything, any questions that your staff can answer.

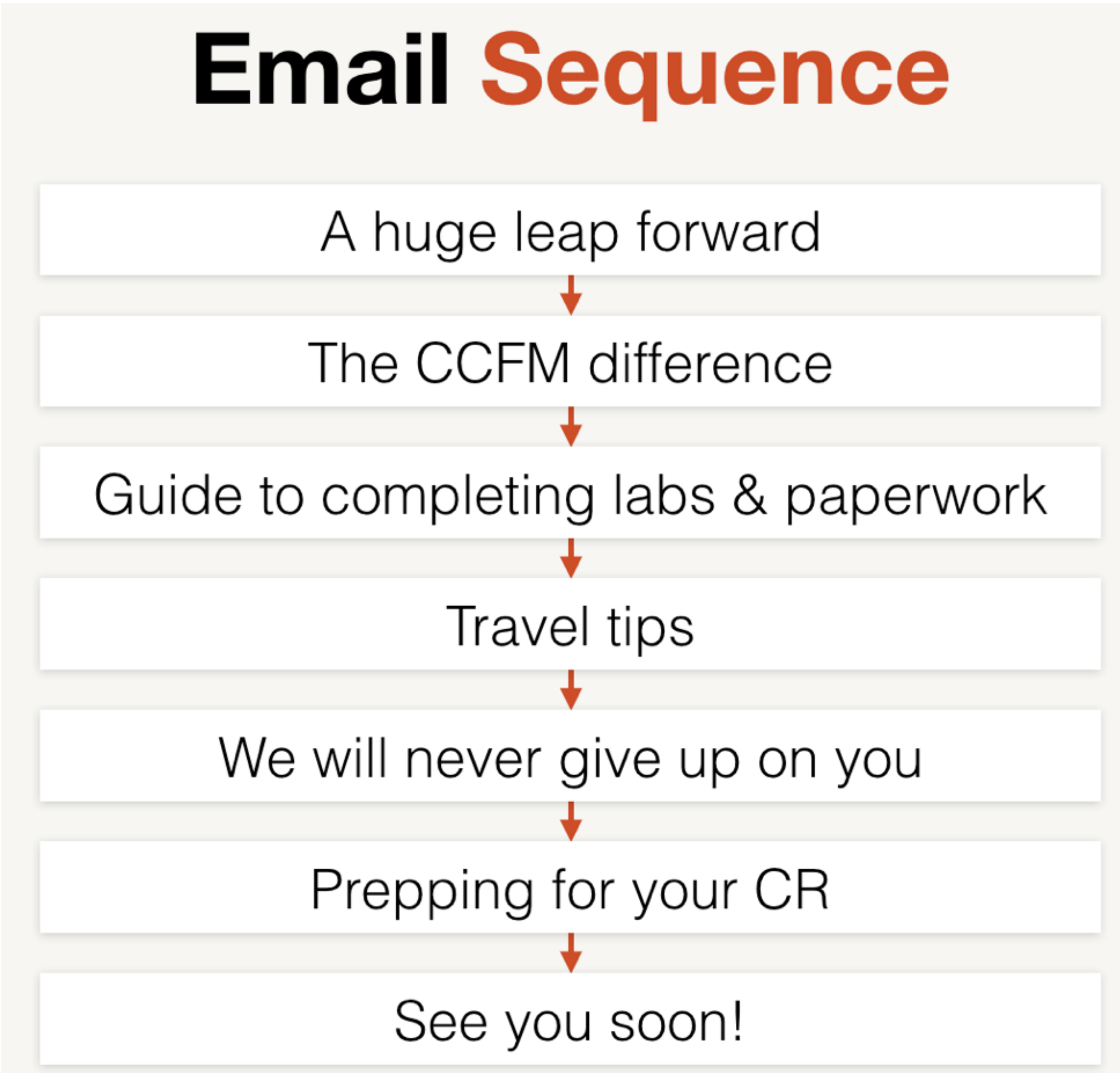
So the MD HQ scheduling system is great. It allows you to create different types of appointments, so you can create an appointment type called initial consult, and then if you link to that appointment type from that registration confirmation screen, it will just list the available slots for that particular appointment time, so, for example, here's a list of the available initial consult times based on the dates that the patient chose.



And the patient just selects this appointment, and then they get a confirmation email with a little attachment, I'm sure you've seen these, where they can automatically add it to their Google calendar. This is great, because the patient can choose their own time, it doesn't involve staff resources going back and forth trading phone messages or emails, and they can also manage their appointment themselves, so if they need to change it, provided it's within the cancellation policy, they can do that at two in the morning without your intervention at all, and it's helpful because you can control the flow of new patients because you can limit the number of a certain kind of appointment that's available each week. So if you have an appointment type called "initial consult," for example, when I was seeing new patients I was only taking between six and eight a week, depending on the week, so I could just set it up so that there were only six initial consult slots available on a given week, so I made sure that I didn't have too many new patients coming into the practice.

After scheduling the initial consult, the patient in our sequence receives a single follow-up email, and the goal of this is again to make them feel welcome and supported and guide them through what to expect in the onboarding process, and then to help those that may be on the fence to take the next step forward. Currently, we're doing this manually, so when a patient schedules their initial consult, our staff is notified and then they add the patient to a different sequence in MailChimp. It's a bit cumbersome, and we're actually working with MD HQ, and I hired a developer to create a connection between MD HQ and MailChimp, and as we make progress with that, I'll share the information with you so that if you want to create that kind of connection, you're able to do it too and it can be completely automated. In the meantime, you can have a staff person who handles new patient onboarding, and they will just, when they see the initial consult that's been scheduled, they can just log into MailChimp, add that patient to a new segment that you've created, and once they're added to that segment it will automatically send this follow-up email.

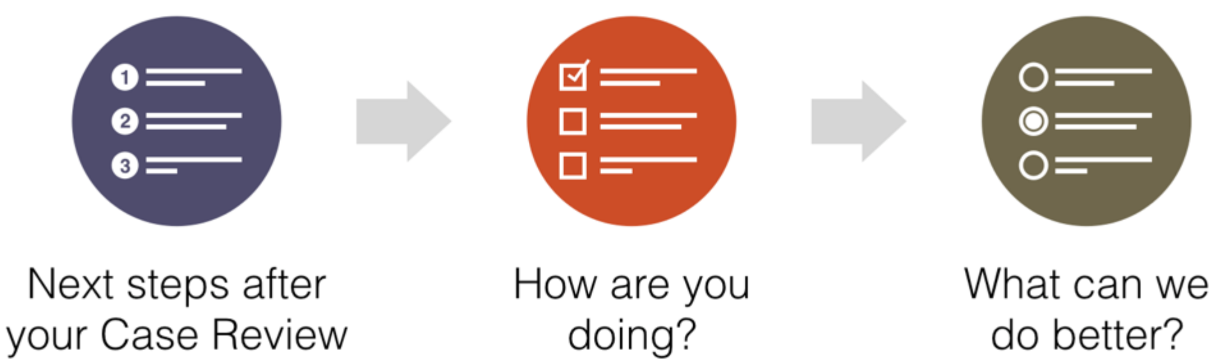
The next step is the initial consult itself, and we're going to be going over this in a lot more detail in an upcoming section, so I'm not going to talk about it here.



After the initial consult is the follow-up that we do. I mentioned this briefly earlier, but once they've had the initial consult, I'm going to go into a lot more detail about this too in a subsequent video, but I just want to give you a really basic idea of what the sequence of emails is that we send, and again this is totally optional, we didn't start doing this until basically just now, five, six years into my practice and I've had a very successful practice without doing this, this is just part of our ongoing growth and evolution, so if this seems overwhelming to you, don't worry about it, don't stress about it, you can have a very successful practice without this.

If your practice is more mature and you have staff resources and time to implement something like this, I think it can be pretty powerful and worth doing, so I'm just going to go through it quickly. They've had their initial consult, you've talked to them about how you think you might be able to help, and the first email goes out, welcome again to the practice, info about what to expect next, you remind them that you've ordered the labs and you'd ask them to do the labs in a timely fashion so that they're back before the case review, and remember to fill out the case review paperwork. Email number two is … we call it the CCFM difference, we're talking about how our clinic is different from other healthcare experiences that they've probably had, and you could do the same for yours. Number three is a guide to completing labs and paperwork; this can be really overwhelming for patients if they're not used to this kind of work, and they could have multiple test kits, lab requisitions, huge stack of paperwork, intake paperwork to fill out, which we're going to talk about later. So, we have developed FAQs for each of the labs, and then we offer some staff support for that, so we go over that in that email. Email number four is travel tips to the Bay Area, this obviously won't apply if you have only a local practice, but we have patients that are coming from all over the U.S. to see us, so we give some travel tips there. Number five, the subject line of that email is "We'll never give up on you." I talked a little bit about this earlier. I think maintaining hope is a really important ingredient in the treatment process, and it's something that we can offer patients as clinicians, and if you, like many other clinicians that I know, have struggled with your own health problems and been able to overcome them, you can provide a pretty powerful reflection for your patients in that regard, so that email basically says "I've been there, I know what this is like, and in my own case I never gave up and I'm not going to give up on you, for as long as you're here and willing to stick with us, we're going to stick with you." Number six is what to expect at the case review and how to prepare for it, it's an unusual appointment, it's different than a lot of kinds of appointments patients have had in the past. And then, number seven is the final message, we're looking forward to seeing you at the case review appointment, it's warm and personal.

Then we have the case review appointment itself, and we're going to go over that in a lot more detail later, so we're not going to cover it here.



And finally we have the follow-up after the case review, so the staff calls the patient within 48 hours to answer any questions, we send detailed follow-up materials explaining the treatment plan and supplements and anything else that was discussed during the appointment, and then we add the patient to the final email autoresponder. So we have three emails in that one, the first is just explaining the next steps after the case review, so reminding them to get any follow-up testing that was ordered, to go ahead and schedule their follow-up appointment because many of our clinicians are booked out at least six to eight weeks in advance, and reminding them that if they have any questions they can submit them to the portal or call the staff. And email number two, we check in with them to see how they're doing with the treatment plan, empathize a little bit about how overwhelming this can all be and offer support. Email number three, we link to the patient feedback survey. This is really important, it's really crucial to get feedback from patients to see how you're doing and see how you can improve, and it's also a good way to collect testimonials, so you can have a checkbox that says something to the effect of giving us permission for us to use them in our website or other promotional materials, and most patients who submit the feedback form check that box, so it's a good way for you to collect testimonials, and you can even have a place for them to upload a picture, and you can ask them whether you can use their full name, or their first name and first initial of their last name, and location. Generally, the more information that they will allow you to use in the testimonial, the more powerful it is.

So that takes us through the overview of the new patient onboarding process. The next steps in the practice management unit are going to be to go into much more detail on each individual component of the process that we just covered, so what we just did was an overview, and we're going to be going into a lot more detail on every piece that we talked about.

Let's talk a little bit first about some of the resources I've included to help you get up and running with this. The first is detailed working procedures that describe step by step how to do each part of the new patient onboarding process. These working procedures are things that we developed recently when I hired a consultant to systematize and make our business more efficient. They've had a dramatic impact on our results, on our ability to onboard new staff members, and just reducing mistakes and making operations more efficient. We'll be talking more about working procedures and how to develop them for your own processes later in the program, but in the meantime I'm just going to give you our working procedures, which will help you to start making your own before we cover that in more detail, train your staff effectively and reduce mistakes. I've also included a copy of our privacy policy and new patient agreement. These have been vetted by our healthcare attorney here in California; I don't recommend using them exactly as they are—obviously you'll need to change names and other things—but you should also consult with an attorney in your own state, because these legal things are different from state to state, and of course your own practices and the way you structure your practice and what's actually in this new patient agreement will differ, but you're welcome to use ours as a guide and a way to think about what should be in there and how to structure it.

I think that's it for now, the next video we're going to dive more deeply into the initial consult, what's part of that appointment, how to do it, how to make it effective, and from there we'll go into more detail on all of the other parts of the new patient onboarding process. I'll talk to you soon.