IntakeQ

7 Steps to Make Your Intake Process Fast and Hassle-Free

This is an extra resource to go along with the original article:
[New Patient Intake Methods to Help Your Practice]

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1. Adopt EMR (Electronic Medical Recordkeeping)

If you aren't using digital medical records, you are behind the times. Not only do they save space and paper (which is money), but they save time. You'll spend less time searching for information and no time organizing it.

2. Allow Online Appointment Scheduling

For many healthcare practices, online scheduling is an easy way to let your patients pick their appointments without burdening your staff. Of course, your online scheduling tool must integrate with whatever tool you or your team use so there are no double bookings. Obviously certain appointments (surgeries, procedures, long consultations, tests, etc.) must be booked by staff.

3. Use Online Patient Intake Forms

Online forms greatly expedite the intake process. Patients can fill out their paperwork before stepping foot in your office. Using conditional logic, you can ask more detailed questions and eliminate questions that don't apply. These forms can automatically be integrated with your EMR system so data appears right where it's supposed to be.

4. Validate Insurance Information (Before the Appointment)

Ensuring your patients have insurance (and that their insurance will cover your service) is an important part of getting paid. Instead of validating after the appointment or making the patient wait while you check their insurance, have it validated before they arrive. Collect this information through your online intake forms.

5. Separate Billing and Scheduling Personnel

If you have a busy practice, separate the billing and scheduling responsibilities. Instead of using two employees to both bill and schedule, assign one as a billing desk and one as a scheduler. This will improve the flow in your office and allow your team members to specialize.

6. Use a Smart Office Layout

You can improve your intake process by using a clever office design. Arrange your office so reception is the first room they enter. Create a circular flow so patients never take the same path twice. This eliminates confusion and keeps everyone moving where they are supposed to go.

7. Establish a Reasonable Late/No-Show Policy

Tardiness and missed appointments are part of the business, but you should protect your patient flow and intake process by creating a policy and sticking to it. You shouldn't wait all day for late arrivals or feel obligated to fit them in when they show. For instance, you might decide that patients who are 20 minutes late are canceled and notified of an opportunity to reschedule. You might also charge repeat offenders a fee for wasting your billing time.