***Advanced Primary Care Curriculum***

***Session 3: Clinic Reception and Scheduling***

Notes on introductory slides (1-3)

**Discussion Questions:**

* Managing encounters
  + What changes to your templates would you want to make to optimize access?
  + When in the schedule would you put same day slots?
  + How long should your regular follow up visits be (20 vs 30 min)?
  + How long and when will your new patient visits be (40 vs 60 min)?
  + How will you ensure new patients show up for their first appointment?
* Creating new workflows and scripts
  + How will you want to communicate appointment options for patients?
  + How will your clinic handle a patient who may not be able to be seen that day (clinic schedule is booked)?
  + What role with the RN’s in the clinic play in triaging patients requesting/scheduling appointments?

**Special Appointments**

What kinds of new appointment types will need to be woven into the schedules?

Any special considerations for these visits?

RN only:

Group visits:

Procedures:

Care Management:

Phone appointments:

**Patient Communications:**

* How can you maximize the use of your electronic messaging portal?
* How do you inform patients about what to expect from messaging communications?

**Enrollment and Access:**

**Comprehensive Payment Model**

For your patients who are enrolled in a CPCP model, how will that be indicated in their registration information?

Who will manage the enrollment updates from the payer (insurance plan, employer, self-pay)

How will providers know who is under the managed care program?

**Blended Practices:**

How will your practice handle non-managed care, fee for service patients differently?

How will you prioritize access?

Team Communications:

Does your team have a clear and standard way of communication about patients with special needs or requirements? (FYI’s, longer than normal appointments, provider notifications if patient calls, etc.)

How do you communicate to other members of the team when you need help with a patient who arrives and needs assistance?

What are the gaps in teamwork that you see?

**Action Items:**

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| --- | --- | --- | --- |
| **Action Item** | **Person Responsible** | **Completion Date** | **Metric or Deliverable** |
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