

Practice Activity Workbook

Front Desk Bootcamp 2024



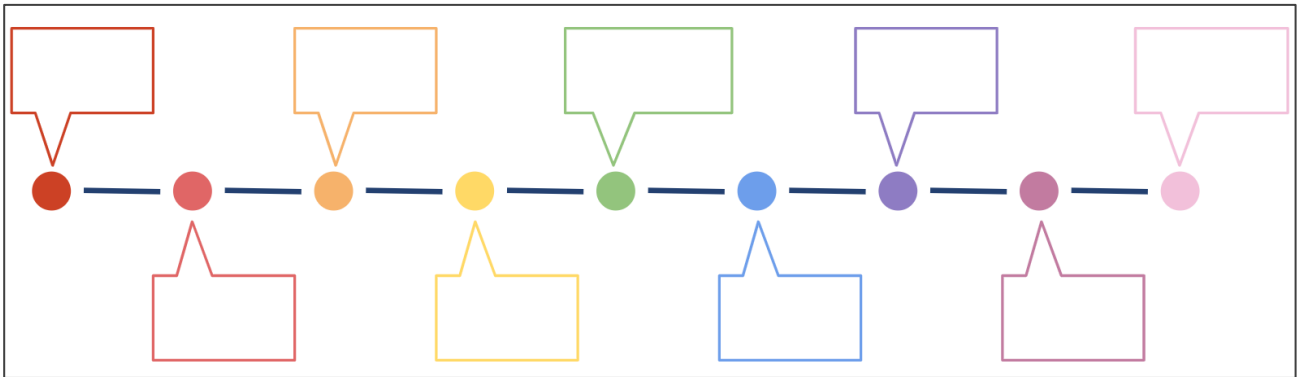
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SCHEDULE CONTROL BOOTCAMP

with Dee Bills, Front Office GURU

The Path That ALL Patients Follow

Fill in the Path Patients Take Through Care



Practical Question: *What can happen if you don't maintain control of the patient's path to success?*

Being the Patient Care Coordinator

Practical Question: List the actions you take that help patients get the care they need and deserve.

Mindset + Certainty + script to schedule

Practical Questions: Write down your top 3 most common negative attitudes or beliefs when working with patients.

Now, write out how you will work to change that to a positive attitude (or mindset).



Having Fixed Ideas

Practical Question: Write down any fixed ideas you have when it comes to working with patients or helping people.

Practical Question: Write down where / when you feel uncertain when working with patients. Then, next to each one, note what you're most afraid will happen.

Control vs Controlling

Practical Question: Make a list of times where you struggle to maintain control when working with patients. Then, next to each one, note what keeps you from handling them.

The PAIN Effect

Practical Question: Based on your practice specialty, make a list of patients you're experiencing the pain effect with. Look at:

- New patients who are rude, short, not following what's needed.

- Current patients who aren't as committed as they were before.



Needs vs Wants

Practical Question: Make a list of 3-5 things YOU need to survive in life. Give me an example.

Then write 3 things you need, in order to survive in your job.

Practical Question: In your workbooks, make a list of 3-5 things you want or hope to have in life.

And then list 3 things you wish for, or hope will happen in your career.

Practical Question: In your workbook, list 3 things that you need from your patients every day.

Confronting Situations and Having Intention

Practical Question: List 5 interactions/activities that you struggle to confront in your position

Practical Activity: Create a plan to improve your ability to confront one of the 5 actions you listed above.
Write it here:

Practical Question: Write out your definition of intention.

Practical Question: Write down at least 3 areas where you're going to work on your mindset and intention when helping patients.

Simple Scheduling Do's and Don'ts

Essential Phone Skills



Scripts and Practice Drills

Script #1 - Scripts to schedule any patient:

"I have [time A] or [time B]." or "I have [time A] or [time B]; which works best?"

Practice DRILL

Find a partner. (One of you will be the patient (coach), and the other will be the PCC.)

Choose the script that you feel most comfortable with and practice it until you have it down pat. Then, the PCC will schedule the patient (coach).

Coach, make sure the PCC sounds certain, and offers two times. Then switch positions.

Script 2 - Script to get ANY patient to call back:

"Hi [patient name], this is [name] calling from [practice name]. I have something really important to discuss with you. I need you to call me by 3pm today so I can review it with you."

Practice DRILL

Find a partner. (One of you will be the patient (coach), and the other will be the PCC.)

Learn this script that I've provided in your pack. Then, the PCC will leave the patient (coach) the voicemail.

Coach, make sure the PCC sounds certain, and uses the word 'need' and provides a specific time (before closing) to call back by.

Give feedback to ensure you've mastered it. Then switch positions.

Script #3 - Script to get a referred patient to call back:

"Hi [patient name], this is [name] calling from [practice name]. I just heard from Dr. [name] and I need to let him/her know that I've gotten you scheduled.

I need you to call me back by 3pm today so we can let him know this is handled."

Practice DRILL

Find a partner. (One of you will be the patient (coach), and the other will be the PCC.)

Learn this script that I've provided in your pack. Then, the PCC will leave the patient (coach) the voicemail.

Coach, make sure the PCC sounds certain, and uses the word 'need' and provides a specific time (before closing) to call back by. Give feedback to ensure you've mastered it. Then switch positions.

Script #4 – Script to avoid vs what to say instead

Scripts to avoid

“What’s a good time for you?”

“Will you be able to make payment today?”

“Would you like to reschedule?”

What you can say instead

“I have a 2pm or 4pm, which works best?”

“That will be \$50, how would you like to pay?”

“Let’s get you rescheduled. I have X or Y tomorrow.”

Practice DRILL

Find a partner. (One of you will be the patient (coach), and the other will be the PCC.)

Choose one of the scripts on the next slide and practice it until you have it down pat.

As the PCC, you will use the script to handle the patient (coach). Coach, make sure the PCC sounds certain, and uses the script properly. Then switch positions.

Script #5 - Script for offering an evaluation when there’s a wait list:

“Our next available appt is [day, date, time].”

Script #6 - Script – Phone Greeting:

Good [morning, afternoon, evening], [practice name], your name, how can I help you?

Practice Drill

Find a partner, one of you will be the PCC and the other will be the coach.

Practice the phone greeting until you’ve mastered it.

Coaches provide honest feedback on how they’re doing.

Do they greet the patient, state the practice name, and their name, and then offer help?

Do they sound interested in helping?





Return to Practice Activities for you and your team

Mindset

As you go through the next week, pay attention to your mindset when working with your patients, make note of moments where you're having a negative mindset.

Then ask yourself, 'how can I turn this into a positive mindset'? And then do it.

Fixed Ideas

As you go through the next week, note any

- Fixed ideas that come up when working with patients
- Or about patient care / patient management

Then ask yourself, 'how are these negatively affecting patient care?' and 'what changes can I make to better help my patients?' And then do it.

Certainty

When you go back to the practice,

- Identify when you feel uncertain with your patients
- Discuss this with your manager and create a plan for increasing your certainty through practice or new processes that help you manage them with confidence.

Scheduling a patient

Continue to practice these scheduling scripts with a partner. Make sure your entire team has mastered this script BEFORE you try to use it on your patients.

Begin to use the scripts with your patients and make sure to let me know how it goes.

Control

Work together as a team. Watch for times when you lose control of your patients and their care.

Begin to work on creating control so you don't have to become controlling.

Leaving Voicemails

Practice the scripts for leaving voicemails. Master each script and implement them in the practice.

Don't forget to share your wins with me!

The Pain Effect

When you go back to the practice, spend some time working on the list you have.

Get in better contact with these patients / parents and help them recommit to care.

** This will require some help from the providers as well.

Needs vs Wants

Over the next week, pay attention to how you're speaking to your patients.

Work to use the scripting we practiced today and make note of how your patient interactions go.

Share your wins with me!

Intention

As you return to the practice, keep focus on your mindset and intention when working with your patients. Pay attention to the times when you struggle most, and work to overcome those struggles.

Simple Scheduling Do's and Don'ts – NEVER Say Sorry

When you return to the practice, pay attention to times when you're saying you're sorry.

Ask yourself, did I do something wrong? If not, work to make changes so it doesn't keep happening.

Avoid Asking When Would You Like to Come In

When you return to the practice, make a personal policy to avoid asking patients when they want to come in.

Instead use the scripts you've learned today.



Front Desk Metrics BOOTCAMP

with Dee Bills, [Front Office GURU](#)

What do we need in order to be successful in any position?

What does winning come from:

What is a product:

List the main product of every practice:

List the 3 products of a Patient Care Coordinator:

What is the product of a phone call:

What is the product of leaving a voicemail?

What is the product of a confirmation call?

The 5 Front Desk Metrics:

Conversions: _____

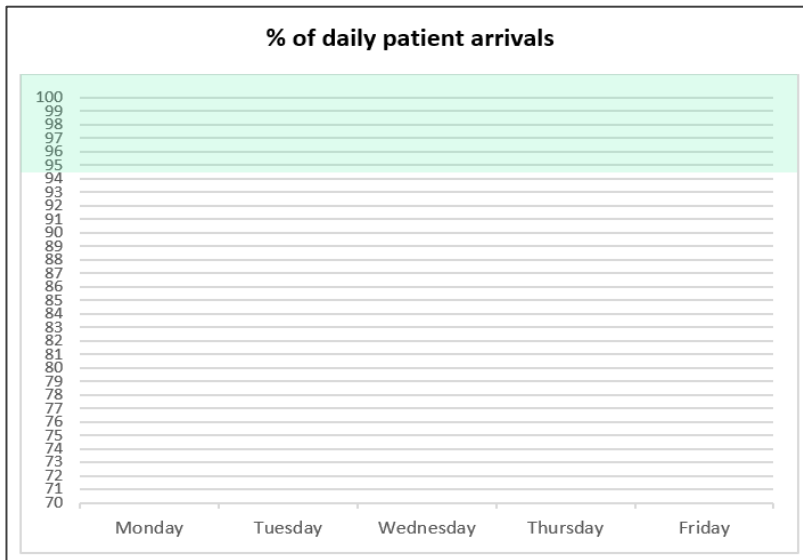
Arrival Rate: _____

Over-the-Counter Collections: _____

Visits Kept Per Week: _____

Schedule Utilization: _____

Graphs:



Return to Practice Activity – Front Desk Metrics



Conversions:

- When you go back, track the % of new patient calls scheduled for an evaluation.
- *Are you getting 90% scheduled or added to the waitlist put them on the waitlist?*
- Or does the patient/parent say “I’ll call back...”
- *Also, how are you able to manage patients with a long wait time to get in?*

Arrival Rate:

- Implement the Clean Arrival Tracking Sheet.
- Track how many visits were scheduled the day before, at closing.
- And how many same-day cancel / no-shows (no matter the reason)
- Don’t make it ‘ok to reschedule’
- You’ll then have a measurement of % of CLEAN ARRIVALS

Collections:

- Begin tracking over the counter collections %.
- Have a policy that if you don’t collect at the time of service, you’ll call before close of business to collect what’s due.
- If the % collected is less than 98%, you need to practice discussion cost of care, and collecting at the time of service

Visits Kept Per Week:

- Begin tracking over the counter collections %.
- Have a policy that if you don’t collect at the time of service, you’ll call before close of business to collect what’s due.
- If the % collected is less than 98%, you need to practice discussion cost of care, and collecting at the time of service

Schedule Utilization:

- Post weekly graphs at the front desk.
- Use the worksheets and track your daily numbers.
- Then enter your daily percentages on the graphs.
- Use the graphs during your daily planning huddles.