

# Why Patient Self-Scheduling

*Healthcare Trends & Getting Started*



# What is Patient Self-Scheduling?



*Patient self-scheduling is the ability for patients to schedule their healthcare appointments online via a portal, website, or through text messaging, anytime, day or night, without staff interaction.*

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Self-scheduling is fast and convenient for patients and saves tremendous time and resources for healthcare organizations that have previously relied on staff to schedule appointments.

Self-scheduling is well on its way to healthcare organizations in the United States. [In 2019 100% of the top 100 health systems](#) are projected to have some solution available by the end of the year, with 50% of medical practices following. The trend is inevitable as patients have been able to self-schedule dinner reservations, book flights and hotels, and request service appointments from smartphones, tablets, and computers for years — it's now an expectation and patients will seek out healthcare providers that can provide them that convenience.

Not all patient self-scheduling solutions are equal, some are less accessible to patients or less integrated into current workflows. Over the following paragraphs, we'll walk through why patient access is both King and Queen, how patient self-scheduling solutions will help your organization achieve its goals, how the various iterations differ, and review best practices.

## Executive Summary

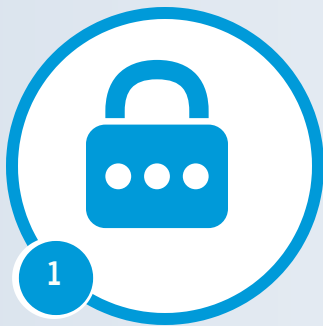
- [Patient Self-Scheduling](#) will quickly become a patient expectation as adoption increases and the demand for self-service and convenient access continues to grow.
- [Patient access](#) can be complicated by multiple barriers, including finances, hours of operation, transportation, and wait time for an appointment. Self-scheduling can address the most significant barriers to access.
- Medical group staff are over-extended and in need of margin to focus on emerging initiatives and financial priorities. Automation is key in creating this margin.
- While patients are anxiously awaiting self-scheduling, having a defined strategy for introducing self-scheduling to your patient population will be important in achieving the results it can offer. Concerns and hesitations are to be expected with new technology, though thoughtful product design should address these.
- Self-scheduling will have the greatest impact to a medical practice when matched with industry best practices.
- Not all self-scheduling solutions are created equal, be sure you know what to look for in the marketplace.
- There are some easy ways to impact pricing and create greater value for you and the vendor you select.

# Patient Access Can Be Complicated

A patient's ability to connect to a provider, schedule an appointment, travel to the provider's location, and pay for healthcare services can all hinder a patient from getting the care they need and can have a significant impact on their health. While self-scheduling can't address every barrier, it does address some of the most significant barriers.

## 3 Barriers to Patient Access

Addressed by Patient Self-Scheduling



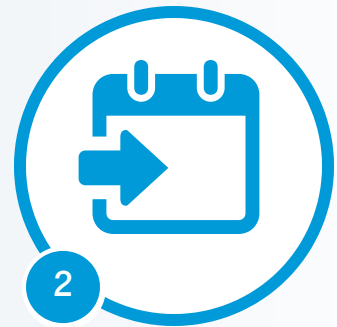
### Business Hours

Business hours restrict patient access, making it difficult for patients to schedule appointments during times that are convenient for them. For many patients, this means it's just easier to put off care as long as possible. A recent Accenture report found that 43% of self-scheduled appointments are booked after business hours.



### Time to Appointment

It takes an average of 24 days to get a first-time appointment with a physician and in some areas of the country this lead time can be as high as 51 days. During this time, a patient's condition(s) can escalate or patients may get discouraged and decide not to seek care at all.



### Distance & Location

Transportation and travel time create significant barriers for many patients who live in rural areas or don't have access to reliable transportation. We also know that transportation issues contribute to patient no-shows. Self-scheduling gives patients greater visibility to available appointments and allows them to choose a date and time that their schedules and commutes can accommodate.

## Self-Scheduling Helps Your Staff, Too

As we watch reimbursement rates get squeezed tighter and tighter, we know healthcare budgets are enduring the same. And yet responsibilities continue to expand, leaving staff with the challenge to accomplish more with fewer people, hours, and less overtime. The scope of both administrative and clinical responsibility continues to grow as roles that were once more clearly defined now encompass any number of additional functions. Some of these include:

## Quality Initiatives

MACRA/MIPS, Patient-Centered Medical Home, Practice CAHPS, and numerous other quality initiatives have emerged to improve healthcare's ability to meet patient needs and control cost. While valuable, these initiatives all come with a heavy data collection and reporting burden that is shared across staff as both administrative and clinical resources adopt new processes, [capture data, store it appropriately, and report as required](#).

## Financial Clearance

It can be a lengthy process to clear a patient for a procedure or test. Medical group staff often spend long periods of time on the phone with payers to obtain approval for the care they need. It's time intensive, confusing, and complicated. The process requires someone who will ask the right questions, advocate for the patient, and complete the appropriate paperwork. In multi-provider medical groups and large health systems, there may be one or more staff dedicated to this role but in many smaller medical groups, this is just one function of someone's varied job responsibilities yet it is vital to the financial well being of the practice and the patient.

## Outstanding Patient Balances

Physician practices don't collect patient payments at the time of service in two out of three appointments, according to research by [Athena Insights](#). This leaves the majority of patient balances to be collected at a later point, a significant task that will only become more important as patient responsibility grows and payer reimbursement shrinks.

Collecting patient balances is becoming increasingly more difficult, a recent [TransUnion report](#) projected that by 2020, the percent of patients who don't pay their full responsibility of their medical bills will rise to 95%. Compounding the problem is the 13% drop between 2015 and 2016 in patients that paid even a portion of their medical bills. Billing staff can enlist the help of a collections agency for large troublesome balances but not without paying [20%-50% of the patient balance](#) in fees. This means you'll need more availability from your staff to [collect patient payments](#), and offering self-scheduling can unlock their time to do this.



Self-scheduling offers new opportunity to empower patients and staff alike. We can give patients the tools and accessibility to set appointments that fit their schedules so they'll stay healthier and they can do it in a fraction of the time it takes for them to sit on hold or navigate the phone tree. And because [self-scheduling frees up one FTE for every 100 appointments that would have been scheduled over the phone](#), staff can now use what would have been scheduling time to tackle some of the half-touched initiatives that have the potential to change the face and wellbeing of their practices.





Self-  
scheduling  
saves one  
FTE for  
every 100  
self-  
scheduled  
appoint-  
ments

## A Deeper Look at Self-Scheduling

Now that we've discussed patient access as an issue and a changing dynamic in healthcare, let's examine self-scheduling more closely as a solution. We'll explore both the benefits and potential sources of resistance to arrive at a well-rounded conclusion.

### Benefits of Patient Self-Scheduling

**It will improve patient satisfaction.** The time savings alone will get your patients pumped about self-scheduling. It takes a patient an average of eight minutes to schedule an appointment over the phone, and a significant portion of this time is spent on hold and being transferred. In fact, [patient calls are transferred 63% of the time](#). That's a great way to end up with a grumpy patient or worse yet, one who gives up, hangs up, and delays their care even longer. Self-scheduling on the other hand only takes a patient two minutes—that's a huge difference! Couple the convenience of the process with having 24/7 access to the schedule and that experience is pretty hard to beat. With [the growth of online review sites and social media channels](#) as platforms for patients to share experiences and recommendations, their reach is now broader than ever which means patient satisfaction is more important to your practice than ever.

**You'll save money.** We've already discussed how long it takes patients to self-schedule, so let's look at staff time. A self-scheduled appointment requires no staff intervention but an appointment scheduled over the phone costs staff an average of 4 minutes\*. That's a lot of staff time tied up in phone calls that aren't driving patient satisfaction or efficiency. The saved time between self-scheduling and traditional scheduling equals a savings of 1 FTE for every 100 appointments booked via self-scheduling. Here's another way to look at this savings: it takes six self-scheduled appointments daily to break-even on the cost of a self-scheduling solution and every self-scheduled appointment that follows saves the practice \$1.

\*The difference between patients and staff in the average time it takes to schedule an appointment traditionally can be accounted for in transfer/hold time for patients.

**It adds flexibility to your staffing model and improves employee engagement.** You have incredible talent working for you, they want to be engaged in meaningful roles where they feel valued. Freeing your staff from manual tasks that can be automated gives them more opportunity to engage with patients face-to-face or apply their talents to a role that can't be replaced by technology.

**It attracts new patients.** Self-scheduling is a great opportunity to differentiate your practice while it's still relatively new to healthcare. Contrary to the belief that only unhappy patients share their experiences, happy patients do this, too. Patients will perceive the expanded access and convenience of self-scheduling as a result of your practice's awareness and sensitivity to their needs and expectations.

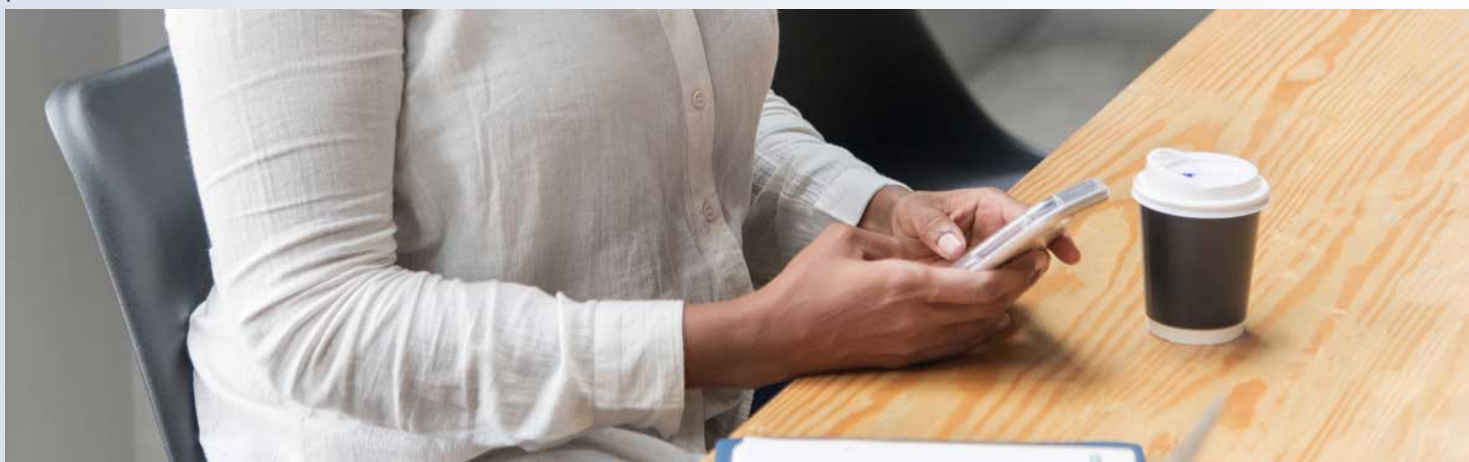
**It reduces your no-show rate.** Patients are more likely to attend appointments they have scheduled themselves [according to experts](#). Scheduling your own appointment increases engagement and engaged patients are more likely to attend as scheduled or notify you if a conflict arises.

**It minimizes non-billable hours by auto-filling last minute cancellations.** Last minute cancellations create a serious revenue leak for health systems and practices because

they are notoriously hard to fill. In fact, only 15% of canceled appointments get filled with a new appointment and 90% of physician practices don't utilize a waitlist. Waitlists are important because they give health systems an immediate source of patients to offer the new appointment opening. An automated waitlist executes this function without staff intervention, notifying patients and allowing them to claim an open spot using text messaging. In the end it fills cancellations faster than your staff could using manual phone calls and maximizes the productivity of your schedule.

07 AVERAGE NUMBER OF PHONE CALLS  
required to fill a last minute cancellation

**It gives your patients after-hours access** without requiring you to hire after-hours staff or pay a call center to provide this service.



## Resistance to Patient Self-Scheduling

Patient self-scheduling seems like a no-brainer: patients want it and it helps lighten the workload for your staff. What's not to love? We stand by our enthusiasm over digital scheduling and we are confident in its ability to solve very real needs for healthcare organizations but it's important to

recognize where resistance can emerge. For many reasons, change can be difficult to adopt, especially in healthcare. So let's examine possible sources of resistance and how to respond.

## Reasons You May Encounter Resistance to Patient Self-Scheduling

### **There is comfort in having control over the schedule.**

Releasing this control to patients seems reckless as practice staff have scheduling down to a science, including providers' preferences, appointment types, charting time, and patient flow. For specialty practices with many appointment types, the schedule is finely tuned and even intricate. But there is great news because self-scheduling can do this thinking and organizing for you. The best self-scheduling solutions on the market allow you to customize how each provider builds his or her schedule. Down to appointment duration and type and what periods of the day certain appointments are accepted, you can customize the structure and ensure optimal patient flow. If it's still unnerving to let automation take care of this for you, you can start with manual approvals until you are confident in the technology's ability and then release appointments to automatic approval.

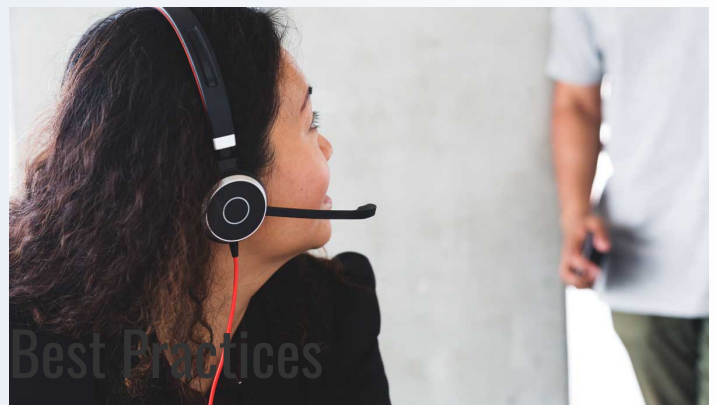
### **It's hard to trust patients to know what they do or don't need.**

Whether it's a patient who doesn't really need to be seen, one who should go directly to the ER, or one that is known for frequently missing scheduled appointments, there's often fear that left to their own devices, patients may misuse self-scheduling. The reality is that quality initiatives aimed at improving patient engagement coupled with unlimited access to information mean patients are more informed than ever and more aware of their options when they need help. As an added fail-safe, self-scheduling solutions should be accompanied by informative messaging so patients understand how to use self-scheduling appropriately. Finally, for patients who are repeat no-show's, ask your self-scheduling vendor if they offer the ability to flag specific patients for prior approval so they can't occupy appointments without staff intervention.

**There's skepticism over patient adoption.** If a practice has a large percent of senior-aged patients or serves an under-served population, they are sometimes unconvinced that self-scheduling will be well-received. The good news is that [research shows](#) an increasing rate of tech adoption by consumers aged 65 and older, and [39% of digitally scheduled appointments are booked by patients over the age of 40](#). Research also supports [technology as a much-needed intervention](#) for under-served populations as it

increases access and has the potential to improve the overall health of those communities.

**Some medical groups employ full-time schedulers.** Self-scheduling can be an intimidating concept to employees in these jobs and their managers—they are valued members of the team. Rest assured that self-scheduling doesn't eliminate the need for your valuable employees but rather, it gives you the opportunity to focus their talent to other priorities. The truth is that **you need every FTE your budget allows** and practice staff are over-extended now more than ever. As the demands on medical groups continue to grow, automation will be key to helping staff keep up.



If you think self-scheduling may be for you, you'll want to be sure you're equipped with practices for implementing and using self-scheduling in your organization. Here are some ways to maximize the return on your investment and ensure you see the most impact from your hard work and resources.

### **Automate Your Waitlist**

Many practices utilize a waitlist for patients who are looking to get into an earlier time slot in the schedule. Having a waitlist makes it easy for practices to fill last minute cancellations but most practices set this in motion with manual phone calls. Your self-scheduling vendor should offer an automated waitlist that initiates communication to patients and continuously rolls through your waitlist until the opening is filled. **Best practice:** Offer every patient a spot on the waitlist in case an earlier appointment opens up.

### **Define Meaningful Appointment Types**

Defining your appointment types is key to keeping your schedule organized and making it easy for patients to identify what kind of care they need from you. Having



appointment types that are too broad makes it difficult to define an appointment length and maintain an accurate picture of patient flow. Having too many appointment types is hard to manage and will be confusing to patients.

### **Integrate with a Complete Patient Engagement Platform**

Self-scheduling can stand alone and offer your patients innovation but health systems and medical groups that are strategic about patient access adopt self-scheduling as part of an [integrated patient engagement platform](#).

This can include at minimum, appointment reminders, but can also include outreach like surveys, health campaigns, and electronic registration. The efficient, digital practice is one that allows patients to self-schedule, automatically reminds them when they are due for an exam or preventative care, confirms their appointments and records their responses, and allows them to complete their forms and paperwork from a mobile device. It sounds futuristic but the digital practice is here and it offers health systems unprecedented efficiency and an engaged patient population.

### **Use The Same Vendor for all Patient Engagement**

If you're currently engaged with a patient communication vendor who doesn't offer self-scheduling, you'll want to consider making a change. Partnering with one vendor can mean:

- Cost savings: most vendors will bundle services and offer reduced pricing on each stand-alone tools if you buy multiple services at the same time
- Lower set-up costs
- Less integration to manage
- Better TCPA compliance: The important task is easier if all your patient messaging is managed by the same vendor.

### **Develop a Self-Scheduling Rollout Strategy**

Your patients will be excited to have the option to schedule appointments without dialing a number, but only if you tell them about it! Housing self-scheduling on your website or inside a portal isn't enough because neither are places patients visit routinely. Here are some ways to inform your patients about self-scheduling and drive adoption:

- Post it on your social media channels
- Add an announcement on your website
- Blog about it
- Equip your staff to talk about self-scheduling when they are with patients
- Use signage in your office and in waiting areas
- Use SMS messaging to notify patients that self-scheduling is available to them and provide them a link to access the service

*"The key is to really work with medical groups during implementation to define what they need for the practice while also minimizing options for the patients. Part of this is asking good questions of patients during scheduling, the answers to their questions will define what appointment type they require."*

Ginny Shipp, Relatient Product Specialist



# Navigating the Marketplace

While patient self-scheduling is relatively new in healthcare, there are several companies offering some version of the service. Each has designed their self-scheduling solution to perform various tasks in their space and it can be confusing to make sense of it all. As you begin evaluating vendors and watching demos, here's a quick break-down of what you may hear during the process and what it means to you.

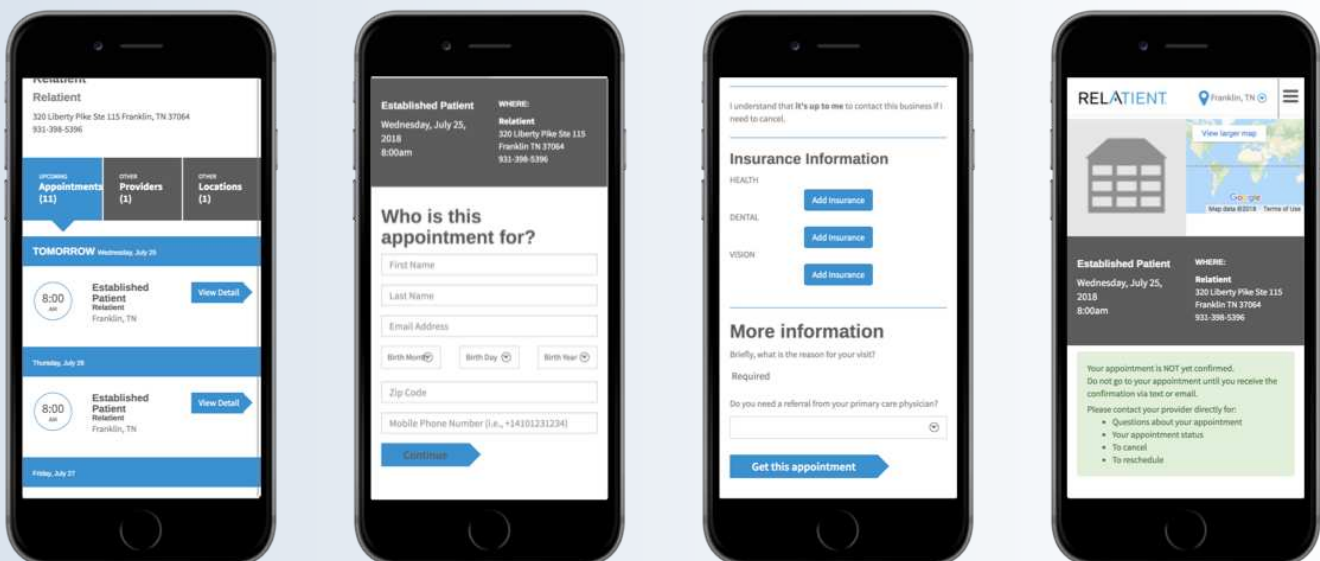
## In-Portal vs. Portal Independent

Driving adoption of patient self-scheduling will hinge on the accessibility of the solution, something that is difficult to offer when self-scheduling is housed inside a portal. If you have already established solid adoption of your patient portal, meaning the majority of your patients access your portal for all their ongoing medical needs, this may be a viable option for your practice. However, most practices find that portal adoption is hard to come by, partly because it requires patients to adopt another account, username, and password. If a patient only accesses the portal a couple times a year, it's likely they'll have to jump through some hoops to reset a forgotten password and reacquaint themselves with the portal each time they use it. If this is the case, the time savings and convenience for the patient is lost and they are unlikely to utilize self-scheduling in this application. Self-scheduling options that are available to patients independent of your patient portal will garner much higher adoption as accessibility will be available to everyone,

including those without a portal account. If your organization arrives at the conclusion that your portal's self-scheduling model is the best option, it will be even more important to develop a strong rollout strategy to drive adoption.

## Stand Alone Solutions vs. Integrated Platforms

A stand-alone solution is a one that is sold separately and is not connected to any other patient engagement solution. This kind of solution can be attractive because the company selling the product likely specializes in one specific technology, making it their sole focus of both product development and customer support. If this is your only strategy for engaging patients, it may be a viable option. Alternatively, an integrated platform offers a solution that complements other components of your engagement strategy. For example, an integrated platform can use a digital health campaign to notify your patient she's due for a mammogram and then also direct her to the self-scheduling link. Once she confirms an appointment, she'll get appointment reminders leading up to her exam so she doesn't forget to prepare for it and attend. Many stand-alone self-scheduling solutions will offer appointment reminders, but only for appointments scheduled through the solution. Appointments made over the phone or in-office won't be included in reminders, putting those patients at higher risk of becoming no-shows.



Relatient Self-Scheduling Platform

### Standard vs. Customized Appointment Types

Every vendor should be offering custom appointment types and durations, this is standard across self-scheduling solutions. The best solutions will take this a step further and help you regulate each day's appointment set up. Maybe the provider prefers to only see sick patients the last hour of the day, so you configure your self-scheduling setup to accommodate this.

### End-to-End Automation vs. Form Request

You'll find some solutions in the marketplace masquerading as "self-scheduling" that in truth are really just appointment requests. They involve completing a form, submitting for review, and having someone from the practice respond. Often a patient still ends up on the phone with a practice because they weren't able to view open appointment slots in real time leaving them to take a stab in the dark for an open date and time. This results in a lot of back and forth and



frustrated patients. Ask your vendor about the process, what can the patient see, and what does the practice see?

### Auto vs. Manual Approvals

When we talk with health systems and medical groups about adopting self-scheduling, one of the most common reservations we encounter is anxiety related to handing the reins over to patients. It's unnerving to think of the mess patients could create given free rein over the schedule. The idea of self-scheduling is to offer your patients convenience and self-service, it's something they want and will soon expect. Customized appointment types help identify what types of appointments are making their way onto the schedule and the ability to determine manual vs. auto approval allows the practice to retain tight control.

It gives the practice manager an opportunity to review the appointment type, what follows and precedes the appointment, and intervene if necessary. If everything looks great, the practice manager hits approve and the patient is confirmed. As staff learn from the patterns and feedback of both patients and providers, they can make tweaks to the set-up and process and set it free to auto-approve appointments.

### Pricing

At some point in your search for a self-scheduling solution, you'll need to evaluate price. And while price can be impacted by a number of variables, we can shed some light on what the common pricing model looks like and how you can impact the final price.

The simplest and most common way to price a solution like self-scheduling is to offer a flat fee per provider per month (pppm). A per provider pricing model offers clarity and manageability, which is why we have yet to see other pricing models utilized for self-scheduling. You can also expect to pay an initial set-up fee, this is standard practice for covering the time and resources required to integrate your solution with your EHR/PM System, testing, and quality assurance. Baseline pricing serves as a starting point in negotiations. You can impact the final price in a number of ways.



# 6 Ways to Impact The Price of Technology



Bundling services- bundling is a great way to put together an integrated patient engagement strategy at maximum value, including self-scheduling.



Contract length- if you're willing to make a long-term commitment, you may be able to negotiate a lower monthly rate in exchange for establishing a long-term relationship.



Beta testing- if you're willing to take part in the beta testing around a new product launch, you can often get your hands on the products or service for a reduced fee.



Serve as a reference- if you love a product and are willing to sing the praises of the product and the company behind it, you can sometimes earn a discount for the time and resources involved in sharing your experience with potential customers.



Find a flexible system- a rigid system will charge you high fees for anything deemed "customization", driving up your price and your blood pressure. Selecting a flexible solution will allow you to configure the technology in a way that meets your specific needs without incurring these costs.



Quick decision-making- pulling the trigger on a contract can often take ages to finalize. If you are able to pull together approvals in an expedited fashion, you can sometimes use this to lock in a deal.

Check out the index for our vendor checklist and [download a copy](#) to use in evaluating patient self-scheduling solutions.

## Conclusion


Self-scheduling is here to grant your patients the [access they want](#) and help your staff get more done. It isn't a trend that we can expect to dissipate as excitement wears off, it is quickly becoming the new front door to a physician's practice. Now is the time to begin planning for this changing dynamic so that when self-scheduling is all but expected, organizations large and small are equipped to meet this need. And while self-scheduling offers patients unparalleled access to health care, the potential gains for practice staff are staggering.

With complicated financial priorities and quality initiatives emerging, organizations need a cost-effective way to shift manual processes to automation so they can focus resources elsewhere. The optimal self-scheduling solution can be utilized via a mobile device and is [not housed inside a portal](#)

because mobile devices have far-reaching adoption regardless of generation, race, or socioeconomic status. Mobile devices offer both voice and internet access where it is otherwise unavailable, making it key to access for patients in both urban and rural locations. Finally, there is much value in having a solid understanding of your organization's specific needs as they relate to a self-scheduling solution and the options you are likely to encounter as you evaluate vendors. Beginning your journey with good information can help you discern between those who claim to offer a robust solution and those who can deliver the results you seek.



Appendix 1.

<div>RELATIENT</div> <div>Self-Scheduling Vendor Comparison</div>			
Features	Solution 1	Solution 2	Solution 3
Vendor Name			
Accessible w/o Portal Account			
Integrated Patient-Engagement Platform			
Customizable Appointment Types Messaging			
End-to-End Automation			
Auto & Manual Approval Available			
Unlimited Volume			
EHR/PM System Integration			
Automated Waitlist			
Built-in Workflow Management			

Download a copy of the checklist [here](#).