

# Front Office Staff Development for Practice Health and Wellness

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# Today's Agenda

- Define the role of the Receptionist in setting the practice image
- Learn how to develop effective communication skills that promote patient compliance.
- Understand how to optimize revenue activity and improve collection performance.
- Gain a behavioral mindset that will ensure quality patient service.

*The Receptionist is  
the Ambassador for  
the medical office*



# Front Office Tasks and Responsibilities



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# Tasks and Responsibilities

- **Appointment Scheduling**
- **Registration**
- **Treatment authorization**
- **HIPAA compliance standards**
- **Chart and records management**
- **Telephone communications**
- **Revenue and collection activity**
- **Mail management**
- **Facility management**
- **Patient safety and comfort**



# **Optimal Task Performance**

## **Ensures Quality Patient Service**

- Clear performance expectations related to tasks and responsibilities
  - Current Job Description
  - Defined mission for practice growth



- Training

- Orientation to the job tasks and systems
- Coaching
- Feedback



- Understanding the front office systems
  - Training
  - Management Support
  - Coaching



- Access to resources for optimal task management
  - Front office work station design
  - Computer technology
  - Communication systems
  - Forms and procedure manuals



- Freedom to succeed and to fail
  - Staff support to achieve a shared goal
  - Staff working together in the effort to deliver quality patient service
  - Leadership sharing common understanding
  - Feedback



# Behavioral Qualities of a **Great** Receptionist



# A Great Receptionist is....

- Dependable
- Organized
- Professional appearance
- Positive attitude
- Kind
- Pleasant
- Honest
- Assertive
- Detailed
- Social
- Understanding
- Active listener
- Knowledgeable
- Tactful
- Diplomatic
- Truthful
- Flexible
- Caring
- Compassionate
- Nice
- Thoughtful



# Patients Surveyed

- Across all age groups most consistent drivers of patient satisfaction in a doctors office setting were:



1. How friendly and courteous they are.
2. How much time physicians spend with their patients.

Press Ganey Associates, Inc.



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# The Practice Image

Not what you think you are.....

But rather what people  
perceive you to be !



The **First Impression**  
A one time **Opportunity**



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# It is in the **Eye** of the Beholder

- The professional **Appearance**
  - Hair
  - Clothing
  - Cleanliness
  - Posture
  - Smile
  - Eye Contact



# The **Message** is in the delivery

- The positive **Attitude**
  - Enthusiastic
  - Confident
  - Polite
  - Kind
  - Humble
  - Natural Self
  - Able, Can, and Will



# There is only **One Goal!**

- **Commitment** to quality service
  - Active listening
  - Eye contact
  - Clarification of facts
  - Appreciation
  - Results oriented



# Adding Up the **Power** of the **First Impression**

- Body Language 55%
- Tone of Voice 38%
- Words 7%



# Patient **Wants** and **Expectations**



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# Patient **Wants** and **Expectations**

- To be Valued
  - Focused attention
  - Understanding
  - Comfort
  - Reduced fear



# Patient **Wants** and **Expectations**

- Provider Access
  - Reasonable appointment access
  - Timely communication
  - Dependable provider service



# Patient **Wants** and **Expectations**

- Treated with Respect
  - Eye Contact
  - Open body language
  - Active listening
  - Confirmation of needs
  - Understanding



# Patient **Wants** and **Expectations**

- Recognized as an Individual
  - Compassion
  - Willingness
  - Desire to serve
  - Results



# Patient **Wants** and **Expectations**

- Affordable Healthcare
  - Defined financial obligations
  - Education in their financial responsibilities
  - Resources for healthcare opportunity



# Patient **Wants** and **Expectations**

- Quality Healthcare
  - Qualified healthcare providers
  - Time with the provider/physician
  - Timely coordination of treatment and resources
  - Access to medical treatment technology



# Patient **Wants** and **Expectations**

- Confidentiality
  - Personal Health Information
  - Financial Information



# Patient **Wants** and **Expectations**

- Safety and Comfort
  - Prevention of exposure to disease
  - Compliance with industry regulations and standards
  - Emergency and disaster controls
  - Facility maintenance and design
  - Equipment maintenance



# Wants and Words

- Affordability
- Quality
- Comfort
- Confidentiality
- Ease
- Dependability
- Access

*Lets play the  
Match Game.....*



# Role of the Physician



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# The Physician's Role



- To be accessible to the patient
- Deliver quality healthcare
- Provide quality treatment coordination
- Spend time with the patient



# Our *Aim* is to deliver

- Compassion.....
- Courtesy.....
- Competence.....

*In everything that we do*



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# Qualities of an effective communicator



# Quality Communication

- **Task Knowledge**

- What to do
- How to do
- Power to do

- **Attitude**

- Having the patient's welfare in mind
- Willing
- Able
- Want to do

- **Perception**

- View the patient as able to understand, commit and comply



# Building the **PRACTICE IMAGE**



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## Communication Skills

*Enhance the practice image*  
*Develop positive patient relations!*  
*Promote Patient Compliance*



# Positive Communication

- “ Thank you for calling Best Maryland Health Center, This is Marvela, I can help you.”

## *Phone attendant routing -Voice Mail option*

- “This is Marvela, I am away from my desk. My job is to help you. Please leave me a message (instructions). I will return your call as quickly as possible”



# Positive Communication

- “Mr. Smith, you are paying for your health insurance benefits. All the more reason that you should value from a complete understanding of your benefits”. There is an 800 customer service # on the back of your card.”



# Positive Communication

- “Ms. Understood, yes the physician has contracted with your plan to provide you with covered access to health care here at *Happy to Serve You Clinic*. We want to keep fees affordable for you. It’s about giving you access to the benefits you have paid for. I need your ID card to process your claim. In the event you do not have the card, we will bill *you* as uninsured for today.”



# Positive Communication

- “Good to see you, Mr. Albert.”
- “The doctor will be glad to see that you are here.”



# Positive Communication

- “To all of you waiting for Dr. Late, patients have had great needs today”. He will be with you shortly.”
- “Thank you for your patience, Dr. Tardy has not arrived to the office for good reason. Does anyone require rescheduling of their time?”



# Positive Communication

- “Ms. Cheap, your co-payment is your responsibility under your insurance benefit plan. Your selected health plan has a share of cost to continue to assist in the payment of your health care services. Should you not choose to meet your obligation, it may affect your coverage.”



# Positive Communication

- “Mr. Tight, you have not paid your last three co-payments at the time of your visit. Your plan allows for a surcharge of \$\_\_\_\_\_ when you have three or more unpaid co-payments.”



# Words that Influence Patient Response and Compliance

- I understand.
- I can hear that you are angry.
- I can see that this upsets you.



# Words that Influence Patient Response and Compliance

- I don't know, but let me get someone who does.
- I will let Dr. Kind know that you feel this way about paying your bill. Thank you for explaining your position.
- Let me make sure I understand.



# Words that Influence Patient Response and Compliance

- Did we meet your needs today?
- Let me give you the options for the appointment time that the doctor will need to evaluate you.



# Words that Influence Patient Response and Compliance

- I can arrange a three tier payment program to make this more comfortable for you.
- For ease of payment, you can authorize your charge card for a telephone payment transaction, set a limit, and we can take care of your bill for you.



# Words that Influence Patient Response and Compliance

- I am sorry that happened, I will take personal responsibility to see that this issue is addressed by the close of the day (*or whatever time line is reasonable*).
- Dr. Exact will want to know this. I will pull your chart and bring your concern(s) to her attention immediately.



**It's about.....**

**Understanding your role  
Optimizing your behavioral qualities**

**TURNING YOUR COMMUNICATION  
INTO A POWERFUL PRACTICE  
BUILDING TOOL**



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***Let's exercise what  
we've learned...***



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