



# Tips to help elevate the patient office visit experience

We believe patients who have positive experiences are more likely to follow medical advice and treatment plans from their health care professional. That's why we've put together this list of a few best practices for you to consider.

## Before scheduling patient visits

- Ensure that you and your practice have enough availability to schedule appointments according to the standards found in the care provider manual. Also, try to allow for time in your schedule for urgent patient visits.
- Meet with your team to discuss their role when engaging with patients

## Office visit reception

- Provide clinical and experience forms to patients by mail or in a digital format. Remind them to complete the forms before arriving for their appointment.
- Have the schedulers or the automated calls remind patients to bring in their completed forms, medications and a list of other health care professionals, including appointment dates and visit summaries

## During the visit – health care professional engagement

- Discuss the patient's goals to improve their health
- Review the patient's labs, procedures and medical records and try to incorporate other treatment services (e.g., vaccine during a single visit)
- Discuss why you're prescribing a certain medication, if applicable, and explain the potential side effects. If appropriate, provide generic, over-the-counter or natural alternatives.
- Check with the patient at the end of the visit to see if they understand the treatment plan you've recommended and if they have questions

## Post-visit – office staff engagement

- Offer to help make any follow-up appointments, and based on your recommendations, print out the following information for the patient:
  - Referral information
  - Lab testing sites
  - Radiology sites
  - Procedure and surgery sites
  - Specialty health care professional information
- Submit prior authorization requests to prevent delays in tests and treatments. Ask the patient to sign an authorization form for medical release of records for other health care professionals (if medically necessary).
- If you're a specialist, remind your staff to share consultation visit notes with the patient's primary care physician. You may also consider an in-office care coordinator to help with patient care management.